High-level I&A Registration Steps

1.1   Introduction:

This abbreviated walkthrough lists the steps required to complete the registration process for the individuals with the roles listed below. This account will allow access to PECOS in order to create and update medicare enrollment Information on behalf of organizations that are healthcare provider and suppliers. Please read and comply with all on screen instructions to ensure compliance with CMS Policy and associated Medicare Programs.

> **NOTE: The following steps assume the organization already has an organizational NPI in NPPES, and all individuals registering have the appropriate authority to access enrollment information for these healthcare organizations.**

1.2   Registering as an Authorized Official for an Organization in I&A

1) **From the PECOS homepage:**
   a. Select the "Register for a user account" hyperlink under the BECOME A REGISTERED USER heading (top right corner of the screen).

2) **A second Internet Explorer window opens directing you to the I&A website**

3) **On the Application Security Check page**

a. Answer the 2 security questions and click the "Next" button

Application Security Check

This security check is used to prevent the creation of fictitious accounts. Please provide answers to the **2 security** questions listed below.

Questions	Answers
∗ What direction is the South Pole?	
∗ What color is a blue car?	

■ Next >

4) **On the I&A – Create User ID and Password page**
   a. Enter a unique user ID
   b. Enter a unique password
   c. Answer the 5 Secret Questions (please remember the response to these questions, you will be presented with your security questions when you need to reset your password
   d. Click the "Next" button

I&A - Create User ID and Password

Please create a User ID and password for accessing I&A and the systems that use I&A.
Creating an organization user account does not represent applying for an NPI.

∗ User ID: [   ]
Note: Personal information, such as a Social Security Number, should not be used as the User ID. The User ID can contain a maximum of four digits. Please note: The User ID cannot be changed.

∗ Password: [   ]
∗ Retype Password: [   ]
Note: Password must be 8-12 characters long, contain at least one letter, one number, no special characters, and not be the same as the User ID.

∗ Select Secret Question 1: [▾]
∗ Answer 1: [   ]
∗ Select Secret Question 2: [▾]
∗ Answer 2: [   ]
∗ Select Secret Question 3: [▾]
∗ Answer 3: [   ]
∗ Select Secret Question 4: [▾]
∗ Answer 4: [   ]
∗ Select Secret Question 5: [▾]
∗ Answer 5: [   ]

■ Next >

5) **On the I&A – User Profile page**

a. Enter all required fields

Note: A valid E-mail address that you have access to must be used when creating a user ID; a confirmation E-mail will be sent by I&A upon approval of the AO request.

6) **On the I&A – Employer Information page**
   a. Enter all required fields
      Note: Regarding the street address, it does need to be a valid US postal address. Users should be sure to accept the standardized address supplied by the system if valid to avoid having their NPI request "Pend", requiring manual intervention by an administrator. This will not prevent creation of the account; however will delay completion of the process by a few days.
   b. Click the "Next" button

7) **On the I&A – My Access Requests page**
   a. Click the "Add Access Request" button

8) **On the I&A – Select Request Type page**
   a. Select the "You are the Authorized Official of the provider/supplier organization" radio button
   b. Click the "Next" button

I&A - Select Request Type

*Indicates Required Field

Note: Please use the Previous and Next buttons to navigate between the pages in the application.

* Select the request type desired for the NPI being added:

⊙ You are the Authorized Official of the provider/supplier organization.
   (The Authorized Officail is responsible for managing users for the provider/supplier organization)

○ You are an end user of the provider/supplier organization

○ You are requesting to act on behalf of an individual provider.

[◼ < Previous]   [◼ Next >]

9) **On the I&A – Provider/Supplier Organization NPI page**
   a. Enter the Organization NPI
   b. Click the "Search" button

I&A - Provider/Supplier Organization NPI

Please provide the provider/supplier organization NPI: [   ]   [◼ Search]

Note: Please use the Previous button to navigate between the pages in the application.

[◼ < Previous]   [◼ Save]   [◼ Save & Add Another]

   c. After you click the "Search" button, the Organization information that you entered in NPPES displays
   d. Click the "Save" button

10) **Back on the I&A – My Access Requests page**
   a. Check the checkbox under the Provider/Supplier Organization heading
      Note: The table displays **Yes** for the "Are you the Authorized Official?" column.
   b. Click the "Submit" button

11) **On the Submit Confirmation page Select the "Yes" button**

12) On the Thank you. Your request will be processed page

    a.   Print this page for your records, make note of your Tracking ID, Organization Name, and Organization NPI.

    b.   Complete all instructions on this page.

Thank you. Your request will be processed.

Note: Please read the following instructions carefully as these instructions are specific to the access request type submitted. Include tracking number on all applicable correspondence.

If you are applying to act on behalf of an **Individual Provider**(e.g. physician, eligible professional, etc)

- You must be approved by the Invdividual Provider before you will be able to act on behalf of the provider.
- You do NOT need to send any documentation to CMS or any of the CMS help desks or information centers.

If you are applying as the **Authorized Official** of your Provider Organization (e.g hospital, physician group, clinic, etc). Please contact the EUS helpdesk for more information (contact information below).

- You must be approved by the CMS External User Services before you will be able to access your organization's data.
- Please send a copy of your organization's IRS CP575 to EUS as supporting documentation so that they can approve your access.
- Write your I&A Tracking ID at the top of your IRS CP575 copy before sending it to EUS.
- You will receive an email when EUS processes your request.

If you are applying as an **Organization End User**

- You must be approved by your Organization's Authorized Official before you will be able to access your organization's data.
- You will receive an email when your Authorized Official processes your request.

Provider/Supplier Organization

App Type	Tracking ID	Provider/Supplier Organization EIN	Provider/Supplier Organization Name(LBN)	Organization NPI
N/A	A05312012462201	XXXXX2012	Jamaica Health	1326328238

13) Log Off

    a.   On the Log Off confirmation page Click the "OK" button to confirm that you would like to log off

14) Once your Authorized Official request has been approved by the CMS External User Services, you will use the user ID and password to log into PECOS.

15) To see finalized enrollment applications in PECOS, follow the "Submitting the Security Consent Form (SCF) for Access to Finalized Enrollment Application in PECOS" steps below.

1.3   Submitting the Security Consent Form (SCF) for Access to Finalized Enrollment Applications in PECOS

1) From the PECOS Homepage

    a.   Login to the USER LOGIN section with your user ID and password

2) **On the Welcome screen**
   a. Select the "ACCOUNT MANAGEMENT" button

3) **On the Account Management page**
   a. Select the "Request access to Medicare provider enrollment records via a Security Consent Form (SCF)" radio button
   b. Click the "Next Page" button

4) **On the Employer and Provider Organization page**
   a. Select the radio button next to the entity for which you are requesting access
   b. Click the "Next Page" button

   Note: The example screen only lists one entity. Other users may have access to multiple entities. If you require access to more than one entity, please follow these steps for each access request.

Employer and Provider Organization

Employer and Provider Organization

(*) Red asterisk indicates a required field.

You are associated to the following Employer:

LBN: Jamaica Health

TIN: 60-6012012

* Which provider is the application being created for?

○ Provider Name: Jamaica Health
Provider Tax Identification Number (TIN): 60-6012012

[◄ PREVIOUS PAGE]   [NEXT PAGE ►]

5) **On the Security Consent Request page**
   a. Click the "View and Print" hyperlink

Security Consent Request

Results

The following Medicare information was found for the Medicare provider that you have identified.

Please print and sign this form below, and mail the signed Security Consent form to the External User System (EUS).

If you wish to add additional records, select the "Previous Page" option below to return to the entry screen.

View and Print Consent Form

Action	Document Name
View and Print ▯	Security Consent Form

Note:
- Documents in PDF format require the Adobe Acrobat Reader® ▯. If you experience problems with PDF documents, please download the latest version of the Reader® ▯.

[◄ PREVIOUS PAGE]   [DONE ►]

6) **A second Internet Explorer window opens displaying the Medicare Provider Enrollment Security Consent Form**
   a. Print this form, populating any missing information

> b. Sign the form and follow the instructions in Section 5 for mailing the form to the External User Services (EUS) helpdesk

7) After you've printed the Security Consent Form
   a. Close the second Internet Explorer window

8) On the Security Consent Request page
   a. Click the "Done" button
   b. The "Done" button will return you to the Account Management screen

9) On the Account Management page
   a. Click the "Return to Home" button

10) The "My Enrollments" button on the PECOS Welcome Screen will remain disabled until EUS approves the users AO request.

1.4 Registering as an Authorized Official for a second EIN in I&A

NOTE: The following steps assume the organization already has an organizational NPI in NPPES that is associated with the EIN, and all individuals registering have the appropriate authority to access enrollment information for these healthcare organizations.

1. **Go to: I&A URL - https://nppes.cms.hhs.gov/NPPES/IASecurityCheck.do**

2. **Use your I&A user id and password you previously created to log into PECOS**

3. **Click the "Account Management" button**

4. **Select the "Update user account information" radio button the click "Next Page" button**

5. **Click "Yes" to continue**

6. **Enter your login credentials**

7. **Confirm your User Profile Information is accurate and click the "Next" button**

8. **Confirm your Employer Information is accurate and click the "Next" button**

9. **On the My Access Requests page**
    a. Select the "Add Access Request" button

I&A - My Access Requests

* *At least one organization is required*

Note: Please use the Previous button to navigate between the pages in the application.

Note: App Type Legend: P=PECOS - Medicare Provider Enrollment; E=EHR Incentive Program

Use the button below to add the NPIs you wish to access:

[Add Access Request]
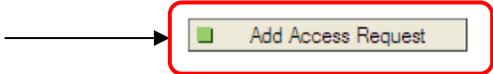
Use the buttons below to select and remove NPIs before they are submitted for processing:

[Select All]   [Clear Selected]   [Delete]

Provider/Supplier Organizations

10. **Now follow steps 8-15 above in "1.2 - Registering as an Authorized Official for an Organization", selecting an NPI that is registered in NPPES associated with the EIN of the Organization you need to access records for.**

1.5   Registering as an End User for an Organization in I&A: If the user does not currently have an I&A account

1. **Go to: I&A URL -** https://nppes.cms.hhs.gov/NPPES/IASecurityCheck.do

2. **On the Application Security Check page**
   a. Answer the 2 security questions
   b. Click the "Next" button

3. **On the I&A – Create User ID and Password page**
   a. Enter a unique user ID
   b. Enter a unique password
   c. Answer the 5 Secret Questions (please remember the response to these questions, you will be presented with your security questions when you need to reset your password
   d. Click the " Next" button

4. **On the I&A – User Profile page**
   a. Enter all required fields

      Note: A valid e-mail address that you have access to must be used when creating a user D; all notification will be sent to the e-mail on this page.

5. **On the I&A – Employer Information page**
   a. Enter all required fields

Note: Regarding the street address, it does need to be a valid US postal address. Users should be sure to accept the standardized address supplied by the system if valid to avoid having their request "Pend", requiring manual intervention by an administrator. This will not prevent creation of the account; however will delay completion of the process by a few days.

Note: The EIN: Entered should be the same EIN that was entered as the Authorized Official who registered (example above: 123456789).

b.   Click the "Next" button
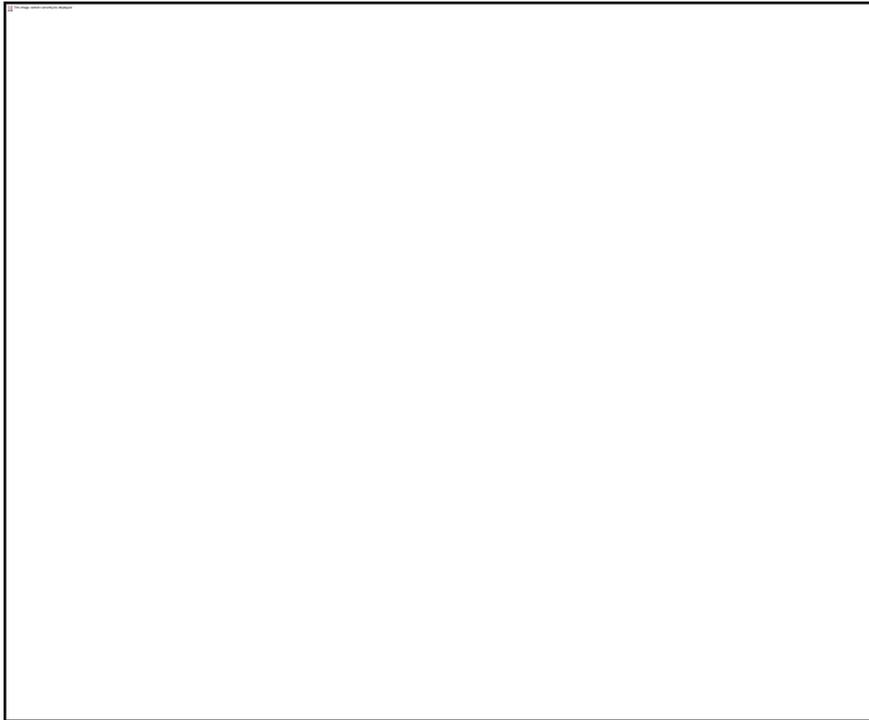
6.   **On the I&A – My Access Request page**
a.   Click the "Add Access Request" button

Note: the access level is tied to the EIN.
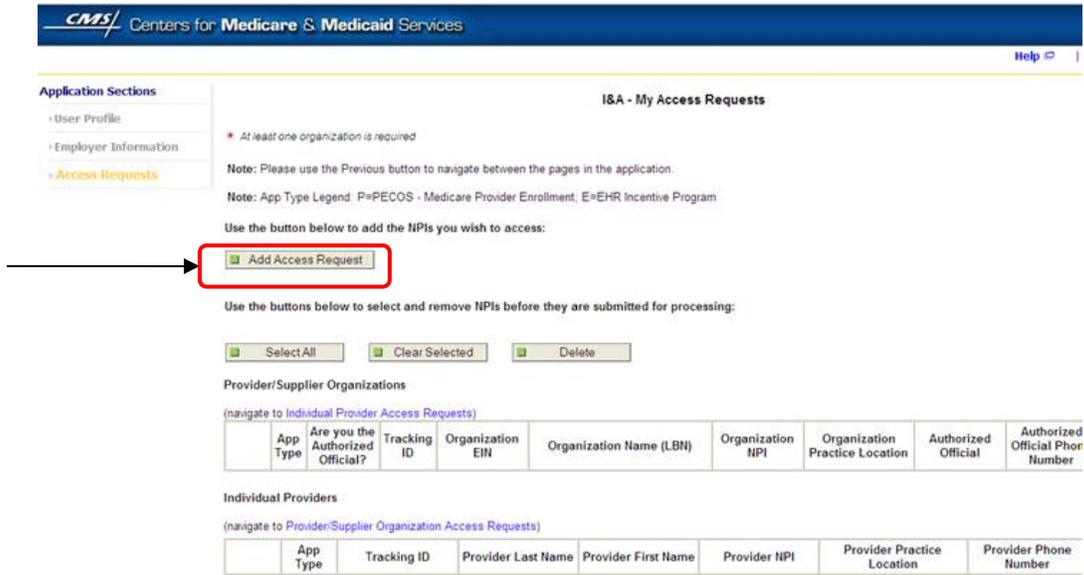
7. On the I&A – Select Request Type page
   a. End users will select the second option. "You are an end user of the provider/supplier organization".
   b. Click the "Next" button
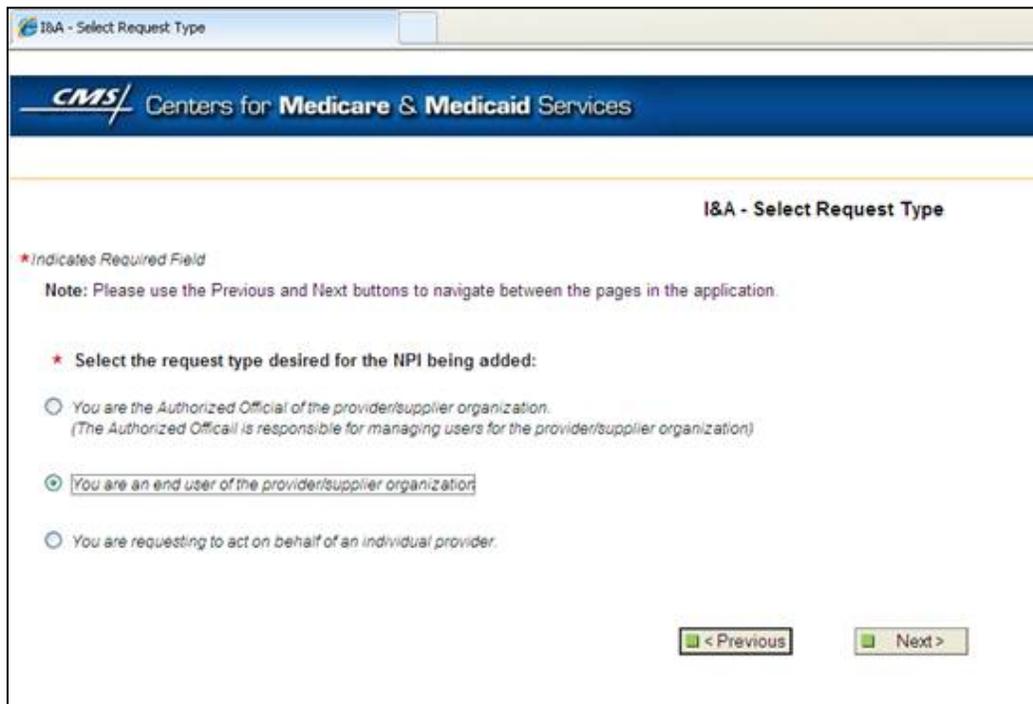
8. On the I&A - Select Application Type page
   a. Select the application for which you are requesting access
   b. Click the "Next" button

9. **On the I&A - Provider/Supplier Organization NPI page**
   a. Enter the Organization NPI

      Note: This NPI must be linked to the EIN for this organization.

   b. Click the "Search" button
   c. After you click the "Search" button, the Organization information that you entered in NPPES displays
   d. Click the "Save" button

10. **When directed back on the My Access Request page, scroll to the bottom and click the Submit button**

11. **On the Submit Confirmation page select "Yes"**

12. **AT THIS POINT THE AUTHORIZED OFFICAL ASSOCIATED WITH THE TAX ID YOU LISTED UNDER YOUR EMPLOYER MUST LOGIN AND APPROVE YOUR REQUEST. Note: External User Services (EUS) does not approve End User requests.**

1.6 Registering as an End User for and Organization in I&A: If the user has an I&A account

1) **Go to:** https://pecos.cms.hhs.gov/pecos/login.do

2) **Use your I&A user id and password to log into PECOS**

3) **Click the "Account Management" button**

4) **Select the "Update user account information" radio button the click "Next Page"**

5) **Click "Yes" to continue**

6) **Enter your login credentials**

7) **Confirm your User Profile Information is accurate and click Next**

8) **Confirm your Employer Information is accurate and click next**

9) On the My Access Requests page select the "Add Access Request" button

High-level I&A Registration Steps

10) Select the second option - "You are an end user of the provider/supplier organization" and click Next

11) On the Provider/Supplier Organization NPI page, search for the Provider/Supplier Organization's NPI associated with the EIN you would like to connect to.

Note: you can confirm this information in NPPES by logging in with the login for that NPI.

12) Back on the My Access Request page, scroll to the bottom and click the Submit button

13) On the Submit Confirmation page select "Yes"

14) AT THIS POINT THE AUTHORIZED OFFICAL MUST LOGIN AND APPROVE YOUR REQUEST. Note: External User Services (EUS) does not approve End User requests.

1.7 Approving an End User Request for an Organization in I&A: As the Authorized Official

1) **Go to:** https://pecos.cms.hhs.gov/pecos/login.do

2) **From the PECOS Homepage**
   a. Login to the USER LOGIN section with your Authorized Official user ID and password

3) **On the Welcome page**
   a. Select the "ACCOUNT MANAGEMENT" button

4) **On the Account Management page**
   a. Select the "Update user account information" radio button
   b. Click the "Next Page" button

Account Management

(*) Red asterisk indicates a required field.

Introduction

The Medicare Enrollment for Providers and Suppliers application allows for the creation, editing, and submission of Medicare data by not only Medicare Providers and Suppliers, but also other individuals or organizations authorized to assist and submit information on behalf of those Providers and Suppliers.

The following options allow the user to update user account information and request access to Medicare provider enrollment records. Select the first option to update profile information and request or remove access to provider organization(s). Select the second option to generate a Security Consent Form (SCF). For a user to access the Medicare enrollments of a provider organization, the user's employer must have a signed security consent form (SCF) from the provider organization acknowledging that the user's employer is authorized to access the provider organization's Medicare enrollment information. Only one SCF is required between an employer and the provider organization.

User Account and Security Management Options

* What would you like to do?

○ Update user account information

○ Request access to Medicare provider enrollment records via a Security Consent Form (SCF)

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5) **On the PECOS Identity and Access Management (I&A) page**
   a. Click "Yes" to continue

The PECOS Identity and Access Management (I&A)

You will be navigated to the PECOS I&A system, which will allow you to update your account information and request access to organization(s) for Internet-based PECOS.

If you select "Yes", you will be directed to the PECOS I&A system and will be required to log in again.

Would you like to continue?

YES   **NO**

6) **On the "Login for I&A" page**
   a. Enter your Authorized Official login credentials

b. Click the "Login" button

7) **On the "Welcome to the I&A System" page**
    a. Click the "Manage My I&A Access Requests" button

8) **On the I&A – Access Requests Search page**

     a. Click the "Search" button to locate "Pending" access requests for your Individual/Organization

9) **On the I&A – Access Requests Results page**
    a. Where the <u>App Type</u> field displays **E**, select the <u>Requesting Tracking ID</u> hyperlink

10) **On the I&A – Access Request Status page**

a. Review the user profile information of the end user
b. If you approve the end user's access, click the "Approve" button

11) **Once approved, the requesting end user will receive a confirmation e-mail stating that the request was successfully processed and approved.**

12) **Upon receipt of the approval e-mail, the requesting end user can now login to PECOS with their user ID and password.**