

NATIONAL PROVIDER ENROLLMENT CONFERENCE

61.5 Million Patients, 2.8 Million Providers, ONE Mission

**August 28 - 29, 2024** 

# Provider Enrollment 101 Part 4

Presented by

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Director, Division of Enrollment Systems

Anthony Peterson, Noridian HealthCare Solutions LLC Manager, Provider Enrollment





### Session Overview

- Introduction to PECOS
- Register for a PECOS account
- Overview of the PECOS Home Page
- Medicare ID Look up Tool
- Revalidation Notification Center
- Submitting Revalidation Application
- Submitting Initial Application
- Submitting Change of Information





## Introduction to PECOS

#### What is PECOS?



The Provider Enrollment, Chain and Ownership System (PECOS) is the system that houses all provider's enrollment and billing information.

PECOS can be used in lieu of the paper CMS-855 enrollment application to:

- ✓ Submit an initial Medicare enrollment application
- ✓ Submit changes to existing Medicare enrollment information
- ✓ Revalidate your enrollment information
- ✓ Track the status of an enrollment application.
- ✓ Reactivate an existing enrollment record
- ✓ Withdraw from the Medicare Program

### Log in Screen



USER LOGIN
Please use your I&A (Identity & Access Management System) user ID and password to log in.
* User ID
* Password
LOG IN
Forgot Password?□
Forgot User ID? <sup>□</sup>
Manage/Update User Profilet□
Who Should I Call? [PDF, 155KB] ☐ - CMS Provider Enrollment Assistance Guide

#### BECOME A REGISTERED USER

You may register for a user account if you are: an Individual Practitioner, Authorized or Delegated Official for a Provider or Supplier Organization, or an individual who works on behalf of Providers or Suppliers.

Register for a user account

Questions? Learn more about registering for an account

**Note**: If you are a Medical Provider or Supplier, you must register for an NPI 🖾 before enrolling with Medicare.

#### **Helpful Links**

Application Status - Self Service Kiosk to view the status of an application submitted within the last 90 days.

Pay Application Fee 🗗 - Pay your application fee online.

View the list of Providers and Suppliers [PDF, 94KB] who are required to pay an application fee.

### Register for a PECOS account



#### Identity & Access Management System (I&A)

I&A is the Identity & Access system used by CMS to allow users to access and control access to PECOS, NPPES

One account to access multiple systems



### **I&A System Key Highlights**



- □ Authorized Officials (AOs) or Access Managers (AMs) are able to add their organization as an employer in I&A to work on behalf of their organization or so a 3rd party organization can work on behalf of providers (& suppliers).
- □ AOs and AMs can add and remove Staff from their organization and control the functions accessible to those staff.
- □ Registering or updating information in the I&A system does not automatically enroll you in Medicare, register you for an NPI, or perform any other actions or updates in the PECOS, NPPES.

### Home Page



#### Welcome

#### Release Notes

Want to learn what's new in the latest PECOS release? Please review the Release Notes [PDF].

#### System Notifications

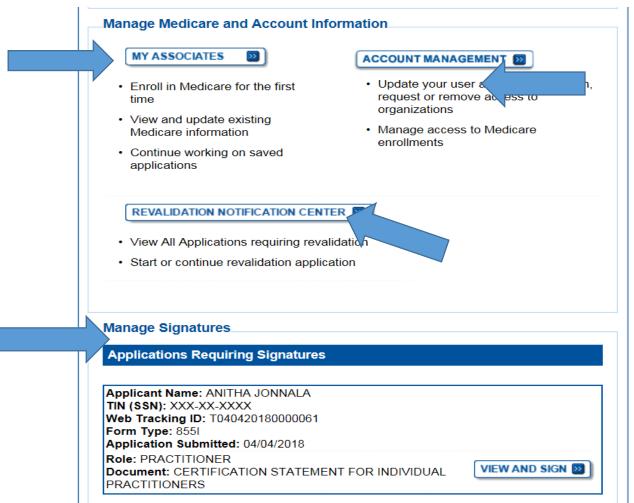
**Note**: JavaScript must be enabled in your internet browser for PECOS to work properly. If JavaScript is currently disabled in your browser, refer to the Accessibility section in PECOS Help for instructions on enabling JavaScript.

#### Details

 PECOS users are no longer able to mail documents that require a signature. When submitting your application, be prepared to provide an e-signature or upload your documents that require a signature.

### Home Page





### Home Page - Medicare ID Look up Tool



#### Welcome Anitha Jonnala Release Notes Want to learn what's new in the latest PECOS release? Please review the Release Notes[PDF]. System Notifications Note: JavaScript must be enabled in your internet browser for PECOS to work properly. If JavaScript is currently disabled in your browser, refer to the Accessibility section in PECOS Help for instructions on enabling JavaScript. **Details** Some features of PECOS are not compatible with IE 10 and IE 11 browsers. These issues can be remediated by enabling Compatibility View. For assistance, please contact your internal IT support helpdesk. For more details on this compatibility view settings for IE 10 please go to the For more details on this compatibility view settings for IE 11 please go to the following site 🖵. · PECOS users are no longer able to mail documents that require a signature. When submitting your application, be prepared to provide an e-signature or upload your documents that require a signature.



#### Manage Medicare and Account Information

#### MY ASSOCIATES

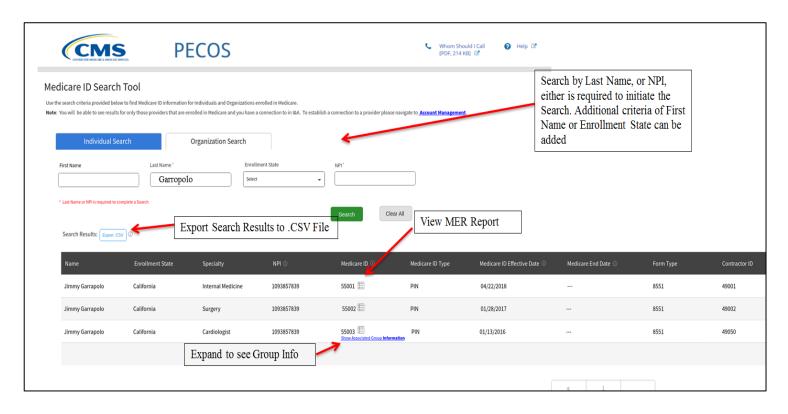
- Enroll in Medicare for the first time
- View and update existing Medicare information
- Continue working on saved applications

#### ACCOUNT MANAGEMENT

- Update your user account information, request or remove access to organizations
- Manage access to Medicare enrollments

### Medicare ID Look up Tool

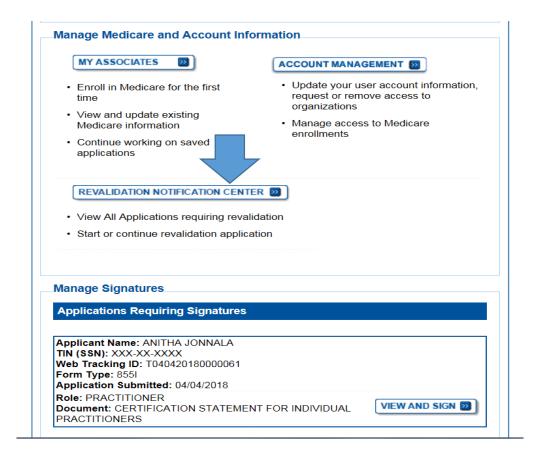






## Question & Answer Session









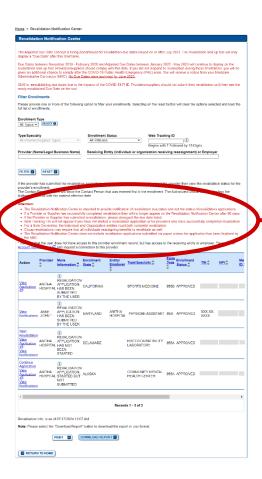
The Adjusted Due Date concept is being discontinued for revalidation due dates issued on or after July 2023. The revalidation look up tool will only display a "Due Date" after this timeframe.

Due Dates between November 2019 - February 2020 and Adjusted Due Dates between January 2022 - May 2023 will continue to display on the revalidation look up tool. Providers/suppliers should comply with this date. If you did not respond to revalidation during these timeframes, you will be given an additional chance to comply after the COVID-19 Public Health Emergency (PHE) ends. You will receive a notice from your Medicare Administrative Contractor (MAC). No Due Dates were assigned for June 2023.

CMS is reestablishing due dates due to the impacts of the COVID-19 PHE. Providers/suppliers should not submit their revalidation until they see the newly established Due Date on the tool.

selected and load the full list of enrollme		ecting on the reset button will clear the options
All Types SELECT		
Type/Specialty	Enrollment Status	Web Tracking ID
All Provider/Supplier Types	✓ All Statuses	Begins with T Followed by 15 Digits
Provider (Name/Legal Business Nam	e)	
Receiving Entity (individual or organ	ization receiving reassignment) or E	mployer
FILTER RESET RESET		





If the provider has submitted the revalidation application, go to the My Associates page to select the provider then view the revalidation status for the provider's enrollment.

The Contact Person column will show the Contact Person that was entered first in the enrollment. The Authorized Official column displays the Authorized Official with the earliest effective date.

#### Attention:

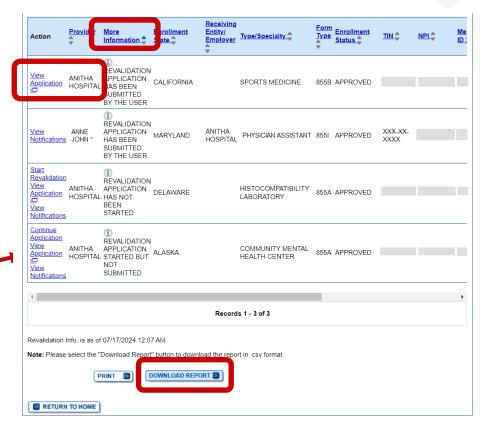
- The Revalidation Notification Center is intended to provide notification of revalidation due dates and not the status of revalidation applications.
- If a Provider or Supplier has successfully completed revalidation they will no longer appear on the Revalidation Notification Center after 90 days.
- If the Provider or Supplier has submitted a revalidation, please disregard the due date listed.
- Web Tracking IDs will not appear if you have not started a revalidation application or for providers who have successfully completed revalidation.
- For a Sole Ownership, the Individual and Organization entities must both complete revalidation.
- . Group revalidations may require that all individuals reassigning benefits to revalidate as well.
- The Revalidation Notification Center does not include revalidation applications submitted via paper unless the application has been finalized by the MAC.

\* indicates that the user does not have access to this provider enrollment record, but has access to the receiving entity or employer.

Please go to Account Management. — and request a connection to this provider.









Action <u>Provider</u>	Receiving Entity/ Employer	Type/Specialty.	Form Type	Enrollment Status TIN	<u>NPI</u> ♣	Medicare ID ♣	<u>Web</u> Tracking ID ♣	Revalidation Due Date	Contact Person	Authorized Official
#		FAMILY PRACTICE	8551	$\begin{array}{ll} \text{APPROVED} \begin{array}{l} \text{XXX-XX-} \\ \text{XXXX} \end{array}$				08/31/2018		
#		PHYSICAL THERAPIST	8551	APPROVED XXX-XX-				11/30/2018		

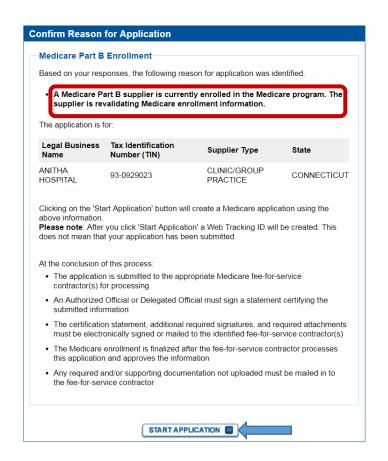
If you are not the surrogate for the provider a '#' will be displayed. GO TO I&A to establish surrogacy



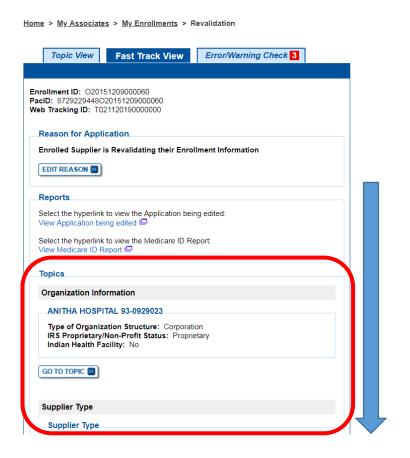
## **Submitting Revalidation Application**

### **Revalidation Application**



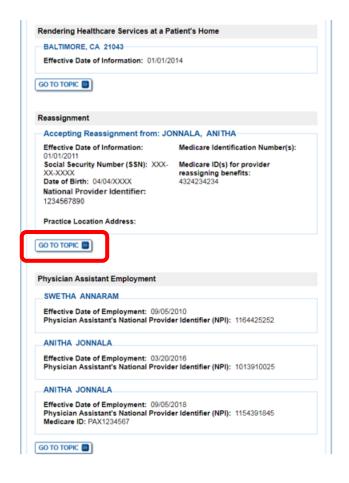


### Revalidation Application – Enrollment Information

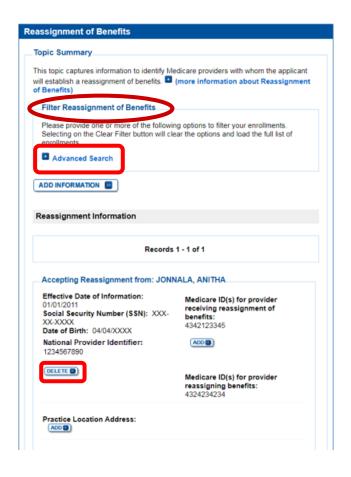


### Revalidation Application - Reassignments



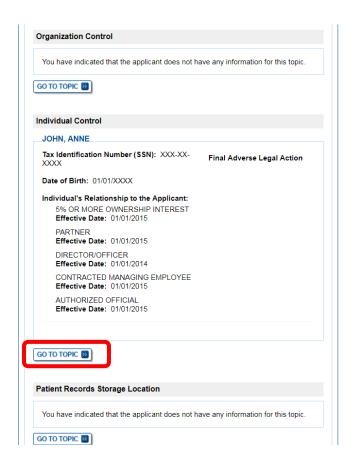


#### Revalidation Application – Update Reassignments



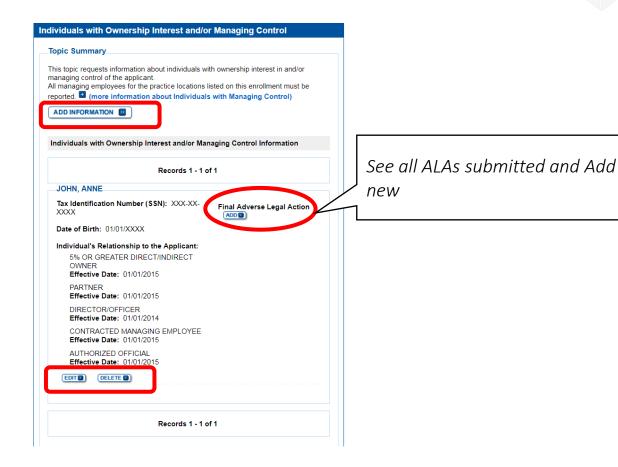
### **Revalidation Application - Control**





### Revalidation Application – Update Control

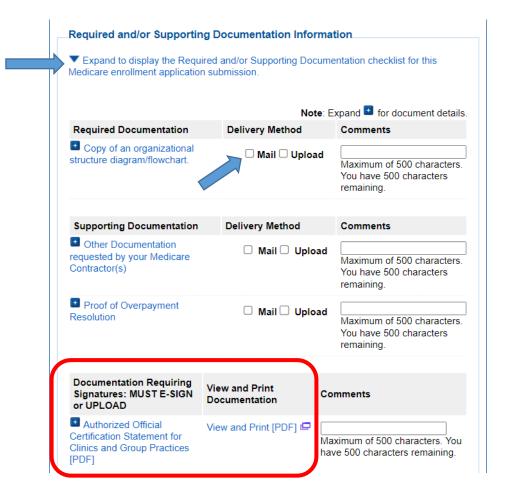




CMS | National Provider Enrollment Conference | August 2024

### **Supporting Documents**

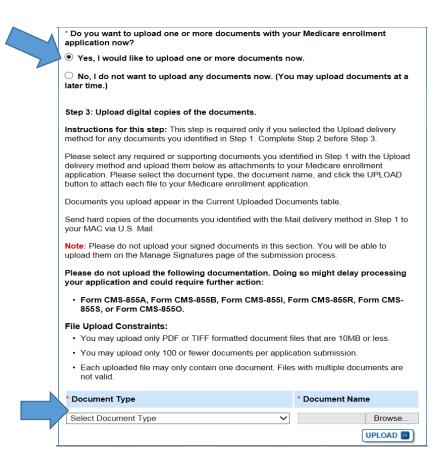


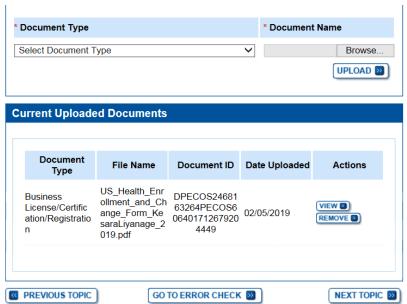


- Expedite Application Processing
- Submit PDF and TIFF formats
- Copy of CMS-855 Form not needed
- Copy of Certification Statement should not be uploaded here

### **Supporting Documents**







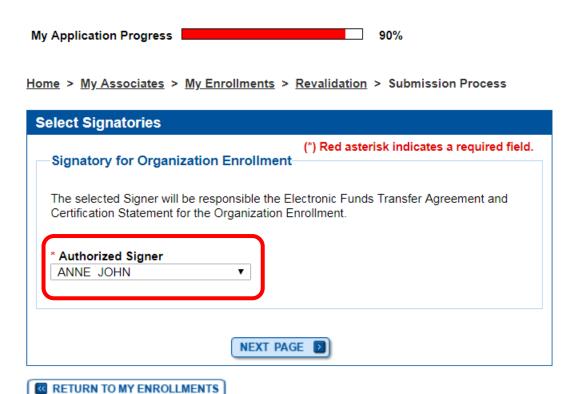
### **Begin Submission**



Medicare Enrollment for Providers and Suppliers ANITHA HOSPITAL   INDEPENDENT DIAGNOSTIC TESTING FACILITY (IDTF)   CALIFORNIA	Home   Help 🔄	Log Out
Topics Topics for this Enrollment		
My Application Progress 90%		
Home > My Associates > My Enrollments > Revalidation		
Topic View Fast Track View Error/Warning Check 1		
Enrollment Submission  Note: Your application is ready for submission with warning messages. Please review the warning messages and select the Begin Submission button.  BEGIN SUBMISSION   Description:		
Enrollment ID: O20160316000092 PacID: 8729229448O20160316000092 Web Tracking ID: T021120190000015		
Reason for Application		
Enrolled Supplier is Revalidating their Enrollment Information		
EDIT REASON   Departs		

### **Submit Signatures**



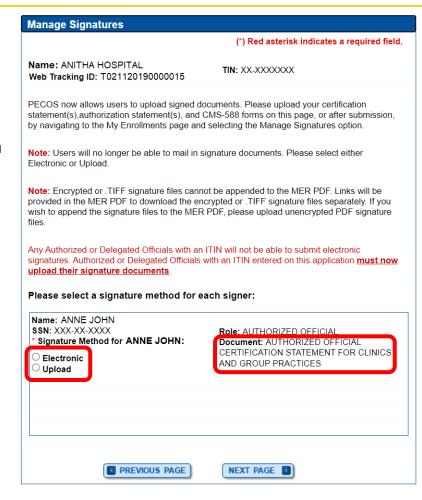


### Submit Signatures



#### **FACTS**

- The Authorized Official (AO) for the organization or Practitioner must sign all initial application
- A Designated Official for an organization can sign a Change Of Information application, so long as the AO is not updated
- When establishing a new contact person for EFT a signature is required
- When establishing adding an IDTF supervising physician a signature is required
- When establishing reassignments for the first time, both the group and the member must sign
- If deleting or modifying an existing reassignment only the initiating party need to sign

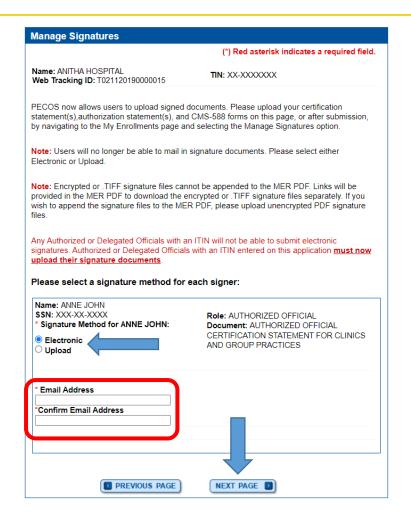


- Sending mailed certification statements will delay application.
- Electronic signatures will help in getting your application processed quickly.
- MLN Matters

https://www.cms.go v/Outreach-and-Education/Medicare -Learning-Network-MLN/MLNMattersAr ticles/downloads/M M10845.pdf

### Submit Signatures - Electronic





### Sample Email



#### Anne John,

A Medicare application for Hospital & Research Center for Initial Enrollment has been submitted by ANITHA JONNALA, 123-12-1231,

@cgi.com. You have been identified as an authorized signer for this application for which CMS allows you to provide an electronic signature using the instructions below. Please disregard this email if you have already submitted a signature.

#### **Enrollment Application Information:**

Provider/Supplier Name: Hospital & Research Center Provider/Supplier Specialty Type: SKILLED NURSING FACILITY

State: GA

Form Type: AUTHORIZED OFFICIAL CERTIFICATION STATEMENT FOR INSTITUTIONAL PROVIDERS (855A)

Practice Location: , ATLANTA, GA

NPI:

Web Tracking ID: T071520240000000

Signatory Name: Anne John
Signatory Role: AUTHORIZED OFFICIAL

T--:-/- Ch-------

Topic/s Changed: All Topics



#### Instructions:

#### If you have a PECOS user ID:

- \* Provide an electronic signature by logging in to PECOS (https://pecos.cms.hhs.gov/pecos/login.do) and navigating to Pending e-Signatures, OR
- \* Directly review the submitted application and e-sign here: Medicare Enrollment Report (<a href="https://pecos.cms.hhs.gov/pecos/EnrollmentReport.do?">https://pecos.cms.hhs.gov/pecos/EnrollmentReport.do?</a> src=login&ryl=true&webtrackingid=T071520240000000) (PECOS login required).

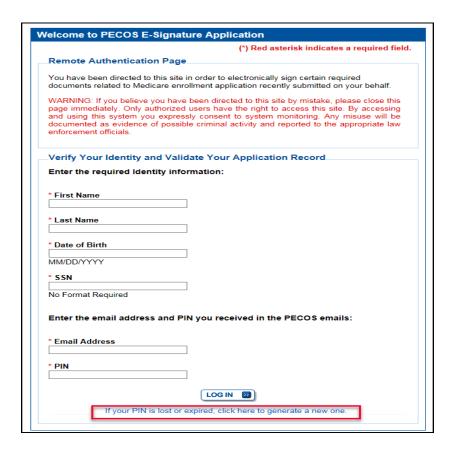
#### If you do not have access to PECOS:

- \* Contact the application submitter above for a copy of the signature document, OR
- \* Review the submitted application and e-sign through the PECOS E-Signature website (https://pecos.cms.hhs.gov/pecos/eSignLogin.do).
- To log in, use your identifying information, e-mail address, and the following unique PIN: 1721054824592.
- Continue to the 'Pending Signatures' section and locate the respective enrollment application to review and apply your E-Signature.

NOTE: The PECOS E-Signature website PIN is valid for 14 days from the time the submitter completed the application. If 14 days or more have elapsed, access the PECOS E-Signature website to request a new PIN or contact the submitter.

### Signatures with PIN





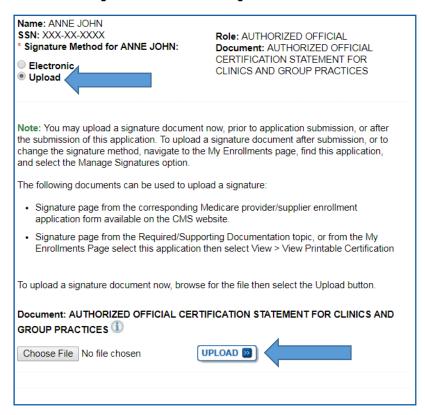
The E-signature page will ask for your information and the PIN from the email

Relocate to the bottom of the screen for a new PIN

### Submit Signatures - Upload



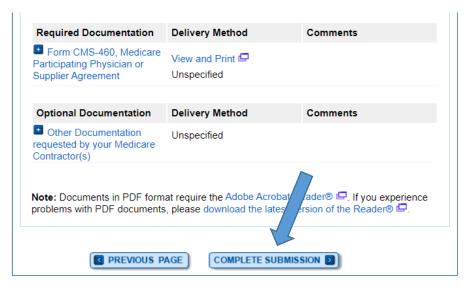
#### Please select a signature method for each signer:



### **Complete Submission**



#### **Submission Page** (\*) Red asterisk indicates a required field. Medicare Contractor The Medicare Contractor(s) listed here would be responsible for processing your electronic and printed application materials. If more than one contractor is listed, you must mail copies of print documents to each contractor listed. You must mail all required print documents within 15 days of submitting the electronic part of your application. Note: Encrypted or .TIFF signature files cannot be appended to the MER PDF. Links will be provided in the MER PDF to download the encrypted or .TIFF signature files separately. If you wish to append the signature files to the MER PDF, please upload unencrypted PDF signature files. Medicare Contractor: NORIDIAN HEALTHCARE SOLUTIONS NORIDIAN HEALTHCARE SOLUTIONS PO BOX 6773 FARGO. ND 58108 Reason(s) for submission: . A Medicare Part B practitioner is currently enrolled in the Medicare program. The practitioner is adding, deleting, or changing general Medicare enrollment information. Reports Select the hyperlink to view the Application being submitted: View Application being submitted 🖃 Select the hyperlink to view the Medicare ID Report: View Medicare ID Report 🖃



#### **Submission Confirmation**



#### **Submission Confirmation - Print Your Receipt**

#### Submission Complete

You have successfully submitted your application!

#### Remember:

- If you selected to electronically sign this application, an e-mail containing the PIN and Web Tracking ID have been sent to the Authorized Signer(s) to complete the E-Signature process for documents pertaining to this enrollment application.
- If you selected to upload the signature for any Authorized Signer(s) for this
  application, and have not done so yet, please navigate to the My Enrollments page,
  find this application, and select the Manage Signatures option to upload a signature
- Your application is not complete until the Medicare Contractor receives fully signed documentation for your application.
- Mail all remaining supporting documents to your Medicare Contractor within 15 days
  of submitting the electronic part of our application.
- Include the Tracking ID or a copy of this page when you mail supporting documentation to your Medicare Contractor.
- Print this page for your records. Note: You can print and/or save copies of the application and required documents for your records by also visiting the "My Enrollments" page.
- When submitting an application with Electronic Funds Transfer (EFT) Information, please include a voided check or confirmation of account information on bank letterhead
- Make sure to add "customerservice-donotreply@cms.hhs.gov" to your safe sender list. You will receive e-mail from this address about your application status.

#### **Enrollment Tracking Information**

Applicant Name: ANITHA HOSPITAL

Tracking ID: T021120190000015

Submitted Date: MON - FEBRUARY 11 2019 01:33:27 PM EST

Submitted By: Anitha Jonnala



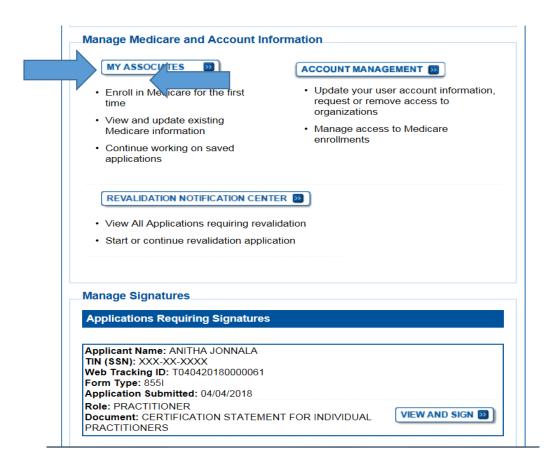
## Question & Answer Session



# **Submitting Initial Application**

## My Associates Button





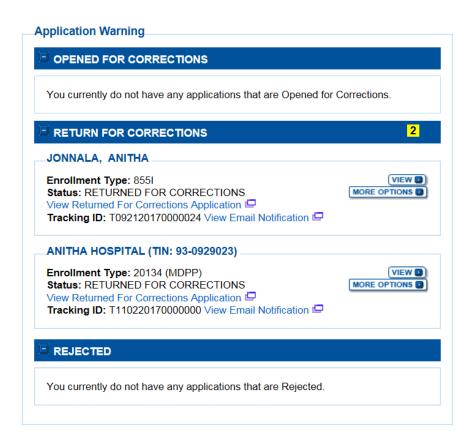
# My Associates – Filter



All Types V	All Provider/Supplier Lynes
Associate Legal Business Name	All Provider/Supplier Types  TIN  XXX-XX-XXXX
Associate Last Name	NPI  10 Digits
Associate First Name	State All States

### My Associates Page - Application Warnings





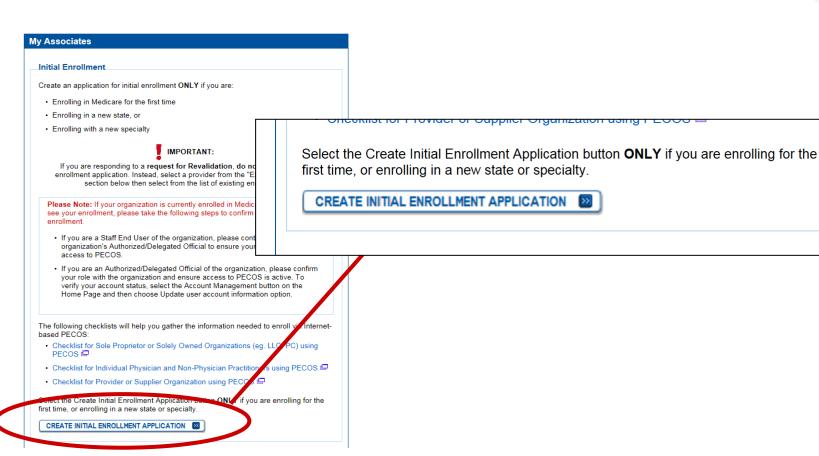
**Opened for Correction** You can see applications that have been retracted after being submitted. You can retract submitted applications so long as all signatures are not submitted with the application. The retracted application will reject 20 days from the first submission if not submitted.

Return for Corrections This section contains electronic applications that were returned for corrections by the MAC due to missing information. An email is also sent to the contact person containing more details on the missing information. You can re-open your application, make the necessary updates and resubmit. If not submitted within 30 days they will be rejected by MACs.

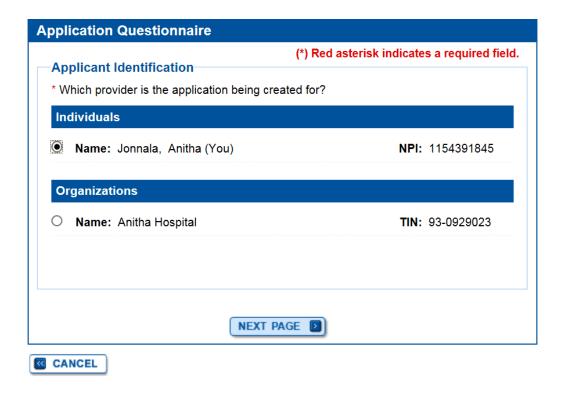
**Rejected applications** These are applications that are rejected by the MAC. If these applications aren't re-opened they are removed/deleted after 60 days from PECOS.

### My Associates Page – Create Initial Application





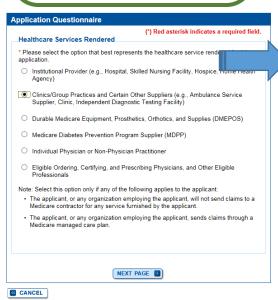
# Application Questionnaire – Select Provider

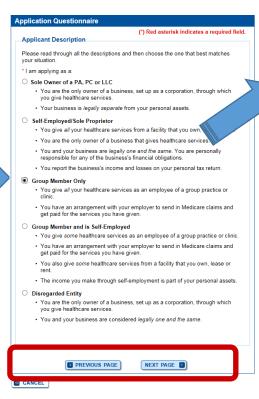


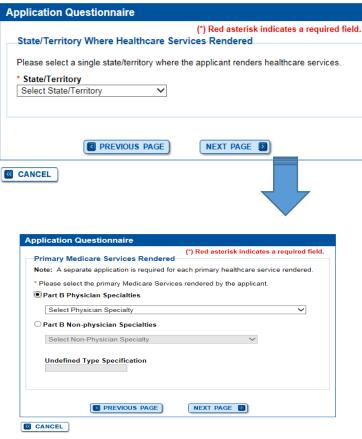
# **Application Questionnaire**



- PECOS will navigate you through a series of questions designed to determine the correct application
- Very Important! If answered incorrectly, the wrong application will populate
- You can click back to the previous question, or Cancel during questionnaire at any time

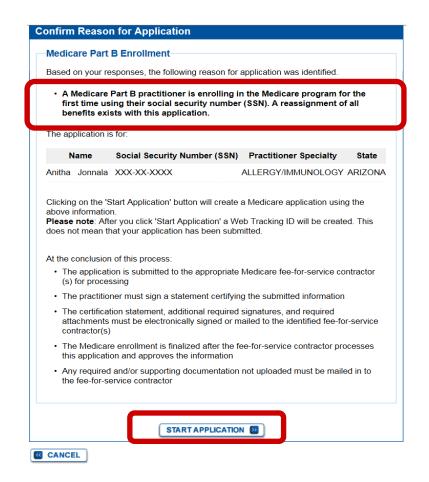






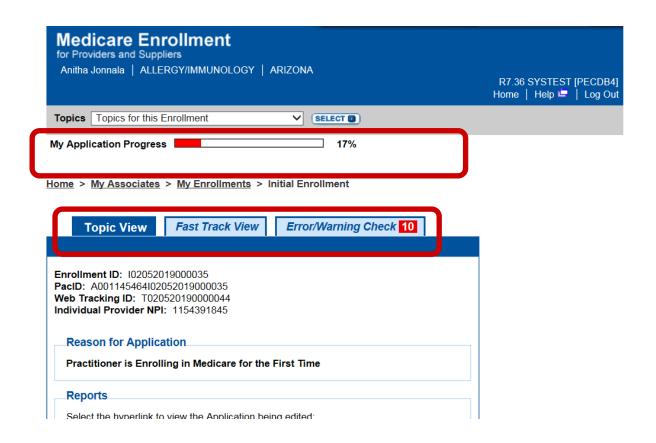
# **Start Initial Application**





# In the Application





# In the Application – Topic View

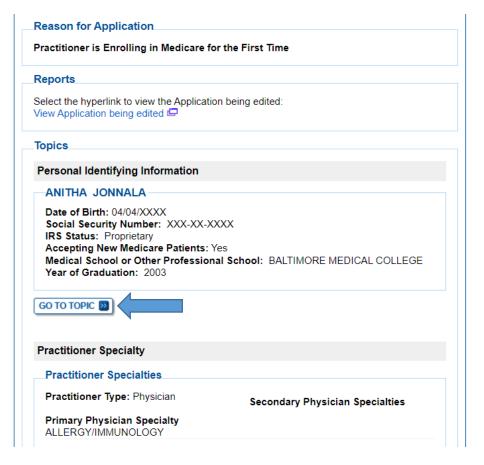


	ired for this enrollment application is grouped into topics. In order to submit this enrollment application, you must complete all of the following
	and print this enrollment application at any time during the enrollment cking the View and Print button below.
This application	on is collecting the following topics:
Completed	Topics
_	Personal Identifying Information Personal Identifying Information
✓	Practitioner Specialty
	Reassignment • more information about Reassignment
	Resident Status  more information about Resident Status
_	Mailing Address more information about Mailing Address
_	License, Certification, and DEA Information about License and Certification Information
	Final Adverse Legal Actions ■ more information about Final Adverse Legal Actions
_	Organization Control more information about Organization Control
_	Contact Person more information about Contact Person
_	Required and/or Supporting Documentation  about Required and/or Supporting Documentation
_	Withdraw Existing Medicare Enrollments Withdraw Existing Medicare Enrollments

- The Topics View displays the topics that need to be completed for your application
- It is designed to align with information needed for the 855 form
- You can navigate to each section by clicking the topic
- As you complete a topic,
   PECOS will apply a check

# In the Application – Fast Track View





- Fast Track View displays information that has been entered on the electronic application
- Go to Topic to update or review

# In the Application – Error/Warning Check



#### Errors for this Enrollment

Errors were found for this enrollment application or the enrollment on file with Medicare. Please review the errors listed below and verify that the information entered is correct.

Verification of this information is required; the submission process will not continue without verification of this information.

Topic	Error
Contact Person	Contact Person is required.
Required and/or Supporting Documentation	Required and/or Supporting Documentation is required.

#### Warnings for this Enrollment

No Warnings were found for this enrollment application.



# **Submitting Change of Information**

### My Associates Page – Existing Enrollments





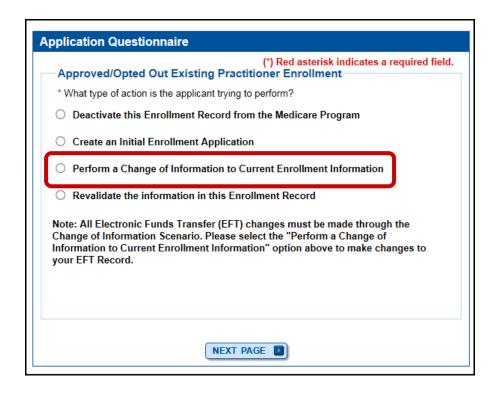
# View Approved Enrollment Record



Please Note: The enrollment records below are displayed in alphabetical order by State a nd Type/Specialty. **Existing Enrollments** Contractor: NORIDIAN HEALTHCARE SOLUTIONS VIEW 📵 State: NORTH DAKOTA REVALIDATE Type/Specialty: CARDIOVASCULAR DISEASE (CARDIOLOGY) MORE OPTIONS Enrollment Type: 8551 View Medicare ID Report 🗗 Medicare ID: Status: APPROVED View Approved Enrollment Record 🗁 Current ADI Accreditation?: No Existing Reassignments: 1 Pending Reassignments Applications: 1 View/Manage Reassignments

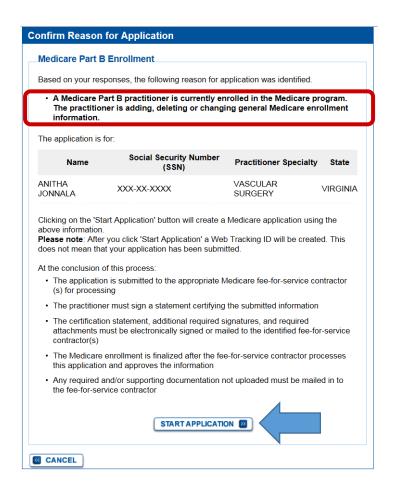
# **More Options**





# Start Change of Information





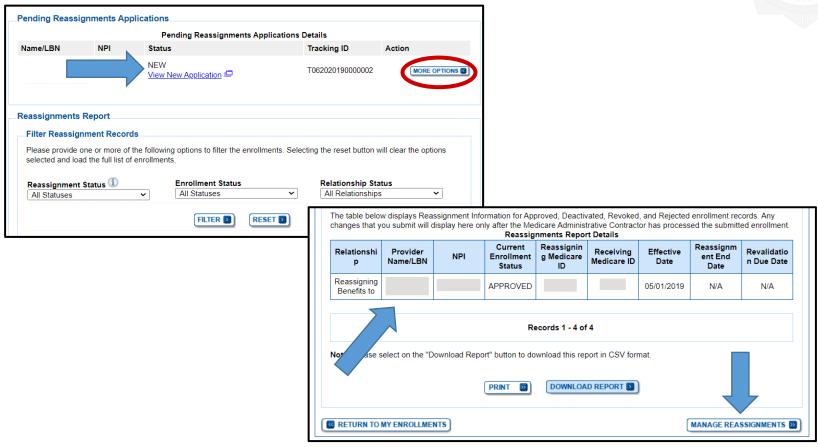
# View Manage Reassignments



<b>Please Note:</b> The enrollment records below are displayed in alphabetic nd Type/Specialty.	cal order by State a
Existing Enrollments	
Contractor: NORIDIAN HEALTHCARE SOLUTIONS State: NORTH DAKOTA Type/Specialty: CARDIOVASCULAR DISEASE (CARDIOLOGY)  Enrollment Type: 855I Medicare ID: View Medicare ID Report  Status: APPROVED View Approved Enrollment Record  Current ADI Accreditation?: No	VIEW (2) REVALIDATE (3) MORE OPTIONS (2)
Existing Reassignments: 1 Pending Reassignments Applications: 1 View/Manage Reassignments	

## View Manage Reassignments





# View Approved Enrollment Record



<b>Please Note:</b> The enrollment records below are displayed in alphabetic nd Type/Specialty.	al order by State a
Existing Enrollments	
Contractor: NORIDIAN HEALTHCARE SOLUTIONS State: NORTH DAKOTA Type/Specialty: CARDIOVASCULAR DISEASE (CARDIOLOGY)  Enrollment Type: 855I Medicare ID: View Medicare ID Report  Status: APPROVED View Approved Enrollment Record  Current ADI Accreditation?: No	VIEW (3) REVALIDATE (3) MORE OPTIONS (3)
Existing Reassignments: 1 Pending Reassignments Applications: 1 View/Manage Reassignments	

# View Approved Enrollment Record



State of Birth
AK
patients? Yes
No Data Provided

## **PECOS** is Easy



We encourage you to use PECOS instead of the paper Medicare enrollment application. Advantages of using PECOS include:

- ✓ Completely paperless process, including electronic signature and digital document feature
- ✓ Faster than paper-based enrollment
- ✓ Tailored application process means you supply only information relevant to your application and specialty
- More control over your enrollment information, including reassignments
- ✓ Easy to check and update your information for accuracy
- ✓ Less staff time and administrative costs to complete and submit enrollment to Medicare



# Question & Answer Session