

**NATIONAL
PROVIDER
ENROLLMENT
CONFERENCE**

57 Million Patients, 2 Million Providers, ONE Mission

Submitting Your Enrollment Online

Vani Annadata

Acting Director, Division of
Enrollment Systems at CMS

Carl Schell

Acting Deputy Director, Division of
Enrollment Systems at CMS

Anthony Peterson

Operational Team Leader, Provider Enrollment
Noridian Healthcare Solutions



Session Overview

- ❖ PECOS: Introduction, Key Features and Online Benefits
- ❖ I&A Overview – Getting Started
- ❖ I&A Connections Explanation and Demo
 - I&A Connection Types
 - Real-World Examples
- ❖ I&A Surrogacy Explanation and Demo
 - Real-World Examples
- ❖ Wrap-up

What is PECOS ?

- ❖ The Provider Enrollment Chain and Ownership System (PECOS) is a national database of Medicare provider, physician, and supplier enrollment information. PECOS is used to collect and maintain the data submitted on CMS 855 enrollment form.
- ❖ PECOS Provider Interface (PECOS PI) - <https://pecos.cms.hhs.gov> can be used to:
 - Submit an initial Medicare enrollment application
 - View or submit changes to your existing Medicare enrollment information
 - Submit a Change of Ownership (CHOW) of the Medicare-enrolled provider
 - Add or change reassignment of benefits
 - Reactivate an existing enrollment record
 - Withdraw from the Medicare Program

Key Features of PECOS

- ❖ Track your application
- ❖ Upload Digital Document
- ❖ Submit Electronic Signatures
- ❖ Submit or Update EFT (CMS-588) information
- ❖ Pay Application Fee (Pay.gov)
- ❖ Print Medicare enrollment information

Key Features of PECOS

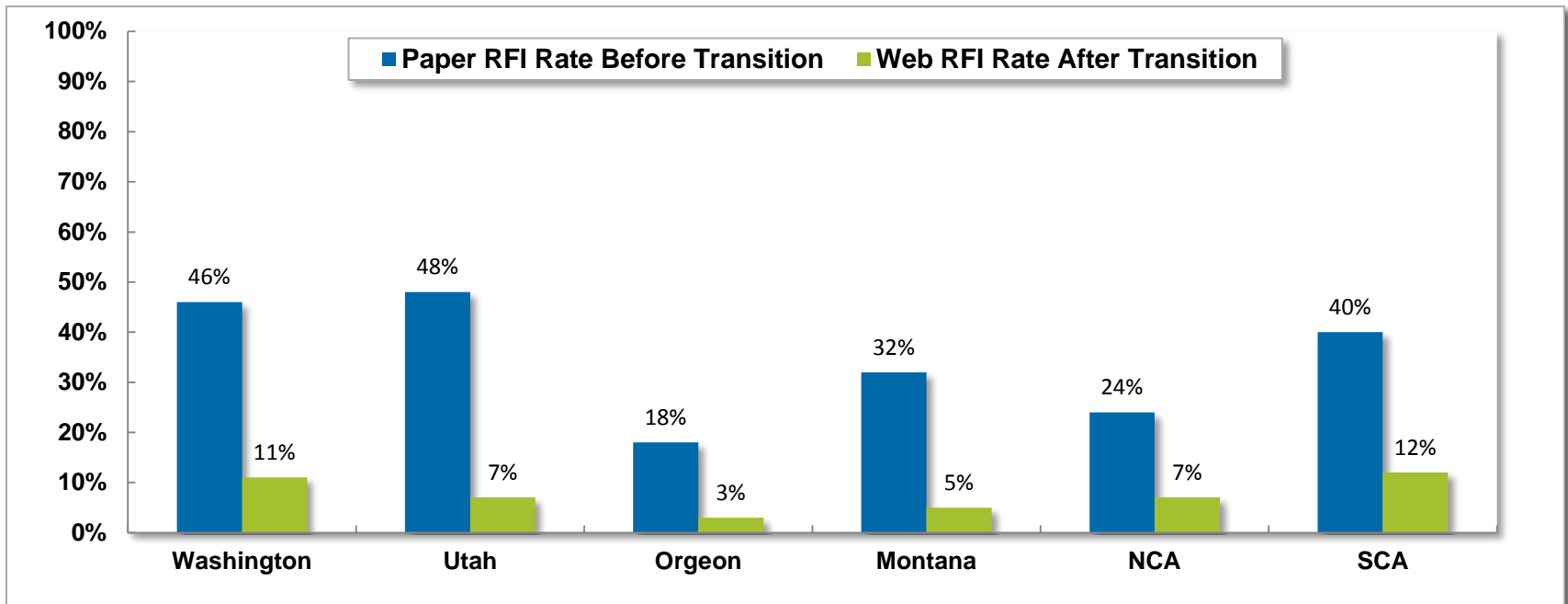
- ❖ Add & Store Multiple Contact Information
- ❖ Fast Track View of Medicare Enrollment Information
- ❖ Transparency for Groups Accepting Reassignments
- ❖ Revalidation Notification Center
- ❖ Review and update NPI records as part of enrollment submission

Benefits of Using PECOS

- ❖ Faster processing times
- ❖ Easier to Revalidate and make changes to enrollments
- ❖ Greater control and accuracy
- ❖ Fewer developments
- ❖ Cleaner applications
 - Built in efficiencies that are in-efficiencies in paper
 - More applications approved
- ❖ Less rejections
- ❖ Less returns
- ❖ Less waste

Benefits of PECOS

- ❖ Examples of decreasing development rates organizations that have transitioned from paper to PECOS



What is I&A?

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

One account to access multiple systems



The screenshot shows the login interface for the CMS Identity & Access Management System. At the top is the CMS logo and the text 'Centers for Medicare & Medicaid Services'. Below this is a header bar with 'Identity & Access Management System' and a 'Help' link. The main content area contains a message: 'Authorized users are able to sign in to the Identity & Access Management System. If you are a new user you must first [register](#).' On the left, there is a 'Sign In' section with a note '* indicates required field(s)' and a label '* User ID:' followed by a text input field. On the right, there is a section titled 'One account to access multiple systems' with the text: 'Create one account with the Identity & Access Management System to manage access to NPPES, PECOS, and EHR incentive programs, manage staff, and authorize others to access your'.

Who can get an I&A Account?

Anyone can get an account in I&A if they want access to PECOS, NPPES or EHR Information or act as a surrogate on behalf of another EIN

Real World Examples

Individual Providers

Third Party Users

Office Assistants

Administrative User

Organizational Representatives

Summer Interns

Lawyers

You!

How do I get started?

<https://nppes.cms.hhs.gov/IAWeb>

The screenshot shows the CMS Identity & Access Management System login page. At the top, the CMS logo and 'Centers for Medicare & Medicaid Services' are displayed. Below this, the title 'Identity & Access Management System' is shown with a 'Help' link. A message states: 'Authorized users are able to sign in to the Identity & Access Management System. If you are a new user you must first [register](#).' The 'Sign In' section includes a note '* Indicates required field(s)', fields for 'User ID:' and 'Password:', and a 'Sign In' button. Below these are links for 'Forgot Password', 'Retrieve Forgotten User ID', and 'Enter your PIN'. To the right, a section titled 'One account to access multiple systems' explains that one account can be used to manage access to NPPES, PECOS, and EHR incentive programs. It includes a 'Create Account Now' button. Below this, three boxes provide more information: 'PECOS' (Use this system to register for Medicare or update your current enrollment information.), 'EHR' (Register to receive EHR incentive payments for eligible professionals and hospitals that adopt, implement and upgrade or demonstrate meaningful use with certified EHR technology.), and 'NPPES' (Use this system to apply for and manage National Provider Identifiers (NPIs).). At the bottom, there are two links: 'Quick Reference Guide' (Overview of features and tools to manage your account.) and 'Frequently Asked Questions' (Answers to common questions about registration, who should register, and how to manage your account.).

- ❖ Follow the Web URL above.
- ❖ Accept the Terms and Conditions
- ❖ Click the “Create Account Now” button

Demo: User Registration

The screenshot shows the 'User Registration' page of the CMS Identity & Access Management System. The page has a blue header with the CMS logo and the text 'Centers for Medicare & Medicaid Services'. Below the header is a light blue bar with 'Identity & Access Management System' and a 'Help' link. The main content area is white and contains a 'User Registration' section. This section includes a note about the email address, two required input fields for 'E-mail Address' and 'Confirm E-mail Address', a CAPTCHA image with the text 'gch67', and a 'Submit' button. To the right of the registration form is a sidebar with two links: 'Quick Reference Guide' and 'Frequently Asked Questions', each with a PDF icon and a brief description.

CMS Centers for Medicare & Medicaid Services

Identity & Access Management System [Help](#)



User Registration

* indicates required field(s)

Note: The e-mail address provided must be a unique e-mail address for you, and will be the e-mail address used to contact you regarding your user account.

* E-mail Address:

* Confirm E-mail Address:

  [Listen to audio](#)

* Enter the text from the image above:

| [Cancel](#)

Quick Reference Guide
Overview of features and tools to manage your account.

Frequently Asked Questions
Answers to common questions about registration, who should register, and how to manage your account.

First page of the **user registration process**. Email address is a unique field and the system will not allow you to create an account with an email that already exists.

Public Access to:

- Help
- Quick Reference Guide
- FAQ

User Registration - User Security

Step 1 User Security Step 2 User Info Final Review

* indicates required field(s)

* User ID:

* Password:

* Confirm Password:

User ID

- Must be 6-12 alphanumeric characters and unique within the Identity & Access Management System and NPDES.
- Must not contain more than four digits, nor spaces or special characters.
- Must not contain personally identifiable information such as SSN or NPI.

Password

- Must be 8-12 characters.
- Must contain at least one letter.
- Must contain at least one number.
- Must contain at least one [special character](#).
- Must not start with numeric characters.
- Must Not be the same as the User ID.

Please select five different security questions and enter their answers below:

* Question 1:

* Answer 1:

* Question 2:

* Answer 2:

* Question 3:

* Answer 3:

* Question 4:

* Answer 4:

* Question 5:

* Answer 5:

Continue

Cancel

User Registration

Step 1 of 3

❖ **Step 1** asks you for the standard information shown on the screen here. You are also prompted to set up your security questions for future password resets.

❖ The user is also shown the **progress bar** at the top to show what step they are in during the account creation process

CMS Centers for Medicare & Medicaid Services Logged in as cschellgov Sign Out

Identity & Access Management System Help

User Registration - User Information

Step 1 ☒ User Security Step 2 ☒ User Info Final Review

Please provide the details below. They will be used to verify your identity. [Back to Previous Page](#)

* Indicates required field(s)

<p>* First Name: <input type="text"/></p> <p>Middle Name: <input type="text"/></p> <p>* Last Name: <input type="text"/></p> <p>Suffix: <input type="text"/></p> <p>* Business Phone Number: <input type="text"/></p> <p>Fax Number: <input type="text"/></p> <p>* Date of Birth: (MM/DD/YYYY) <input type="text"/></p> <p>* SSN: <input type="text"/></p> <p>Primary E-mail Address: carl.schell@cms.hhs.gov</p>	<p>* Personal Phone Number: <input type="text"/></p> <p>* Home Address Line 1: <input type="text"/></p> <p>Home Address Line 2: <input type="text"/></p> <p>* City: <input type="text"/></p> <p>* Country: <input type="text" value="United States"/></p> <p>* State/ Province/ Territory: <input type="text" value="SE - Select One"/></p> <p>* Postal/ ZIP Code: <input type="text"/></p>
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[Continue](#) | [Cancel](#)

User Registration

Step 2 of 3

- ❖ **Step 2** asks you for the account profile information shown here. Information here may be used for future verification process (i.e. SSN)
- ❖ The progress bar indicates that you are currently on Step 2 and that Step 1 is complete.

User Registration

Step 3 of 3

- ❖ **Step 3** is the confirmation screen and you are done. Click “Continue to the Homepage” to continue.

The screenshot shows the 'Identity & Access Management System' interface. At the top, there's a header with the system name and a 'Help' link. Below the header, the page title is 'User Registration - User Information'. A progress bar indicates three steps: 'Step 1 User Security' (completed with a green checkmark), 'Step 2 User Info' (completed with a green checkmark), and 'Final Complete' (highlighted in blue). A message box states: 'Congratulations, your account has been successfully created.' Below this, a list of instructions is provided: 'If you are an Individual Provider, you will be able to see all associations with your NPI.', 'If you are an Authorized Official or a Delegated Official, you will need to add your employer(s) to manage staff and connections associated with your employer(s).', and 'If you are a Staff End User, you will need to ask an Authorized Official or Delegated Official associated with your employer to invite you to work on the behalf of the employer.' At the bottom, there is a 'Continue To Homepage' button with a right-pointing arrow.

DEMO: Tab - Home

Identity & Access Management System? **Help**

HomeMy ProfileMy ConnectionsMy Staff

Home

My Pending Connections

These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.

Total Pending Providers: 0

Total Pending Surrogates: 0

News & Alerts

i EUS Contact Information:
External User Services (EUS)
PO Box 792750
San Antonio, Texas 78279
<https://eus.custhelp.com>

Quick Actions

Add Connection

Add Staff

Add Employer

DEMO: Tab - My Profile

Home

My Profile

My Connections

My Staff

My Information

Name: Carl Schell

Date of Birth: 11/14/1974

SSN: 123-45-6789

Business Phone Number: 408-576-8777

Fax Number:

Home Address: 1234 Main St
San Jose, CA 95131
United States

Personal Phone Number: 408-576-8777

Modify My Information

Primary E-mail Address: carl.schell@cms.hhs.gov

Modify Primary E-mail

Password

Your Password will expire in **60 day(s)**.

[Change Password»](#)

Security

[Change Security Questions & Answers »](#)

DEMO: Tab - My Profile

Home

My Profile

My Connections

My Staff



Employer Information

Employer ▼	My Role with this Employer ▼	My Status with this Employer ▼	PECOS	EHR	NPPES
+ Carl's Org Two	Staff End User	Approved	NO	NO	YES
+ Schell, Carl	Authorized Official	Approved	YES	YES	YES
+ Test Care Diagnostics, Inc.	Authorized Official	Pending Approval Tracking Id A4484250	NO	NO	NO

If you wish to add an employer, click "Add an Employer".

Add an Employer

DEMO: Tab - My Connections

Home

My Profile

My Connections

My Staff

☐ XYZ Org

XYZ Org is a surrogate for the following providers:

XYZ Org has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below.

Name	NPI	Tracking ID	Business Function	Access Status
<input type="checkbox"/> New Other Org		S1673371	NPPES	Approved

XYZ Org has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of XYZ Org

DEMO: Tab - My Connections

[Home](#)[My Profile](#)[My Connections](#)[My Staff](#)

Schell, Carl

Schell, Carl is a surrogate for the following providers:

Schell, Carl has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. Use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Find Provider

Name	NPI	Tracking ID	Business Function	Access Status
TESTCHECK INC		S1673351	PECOS	Pending
		S1673352	EHR Incentive Program	Pending
		S1673353	NPPES	Pending

DEMO: Tab – My Staff

[Home](#)[My Profile](#)[My Connections](#)[My Staff](#)

Active Staff

Skip to [Inactive Staff](#) [Role Requests](#)

[Add Staff](#)

Search by: * Last Name

First Name

[Search](#)

Name ▼	Role	PECOS	EHR Incentive Program	NPPES
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Pending Role Requests

Skip to [Active Staff](#) [Inactive Staff](#)

Search by: * Last Name

First Name

[Search](#)

Name ▼	Current Role	Request Role	Action
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Inactive Staff

Skip to [Active Staff](#) [Role Requests](#)

Search by: * Last Name

First Name

[Search](#)

Name ▼	Role	PECOS	EHR Inc Program	NPPES	Notes
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I have an account now... can I use PECOS?

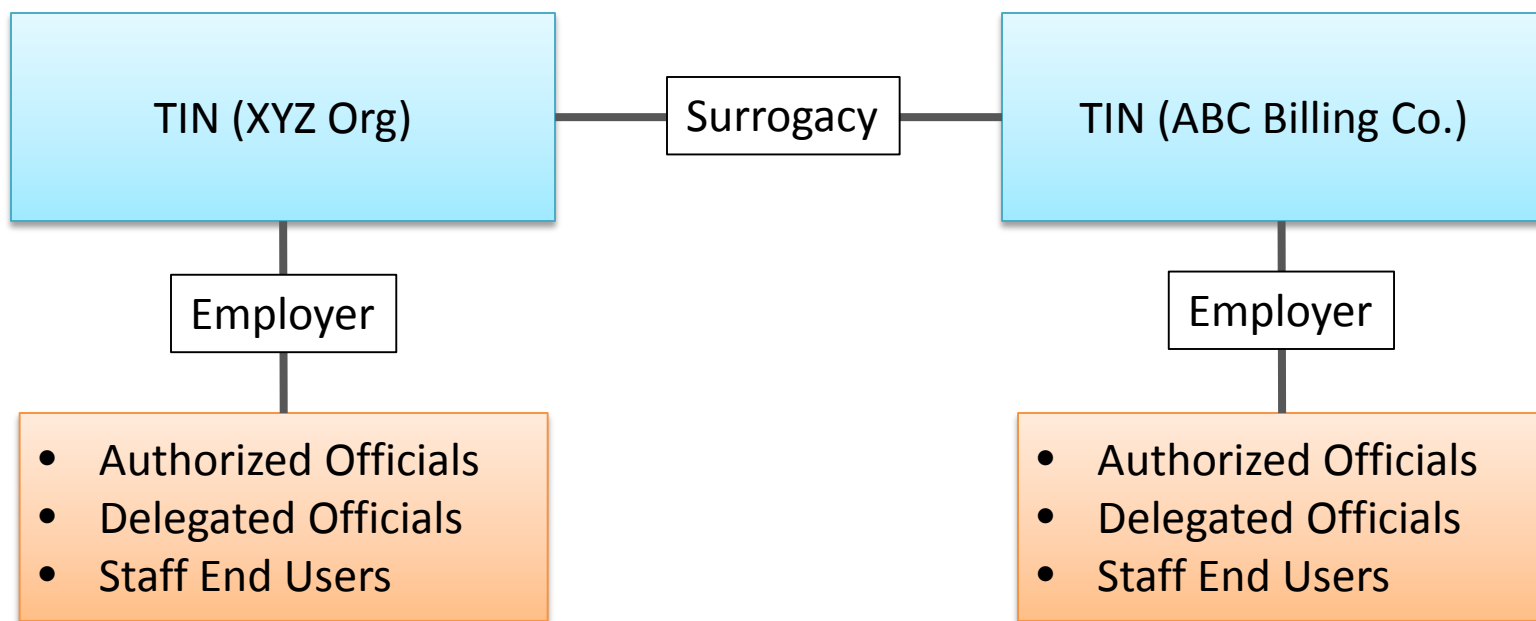
Not yet, you don't have any
connections!

What is a Connection?

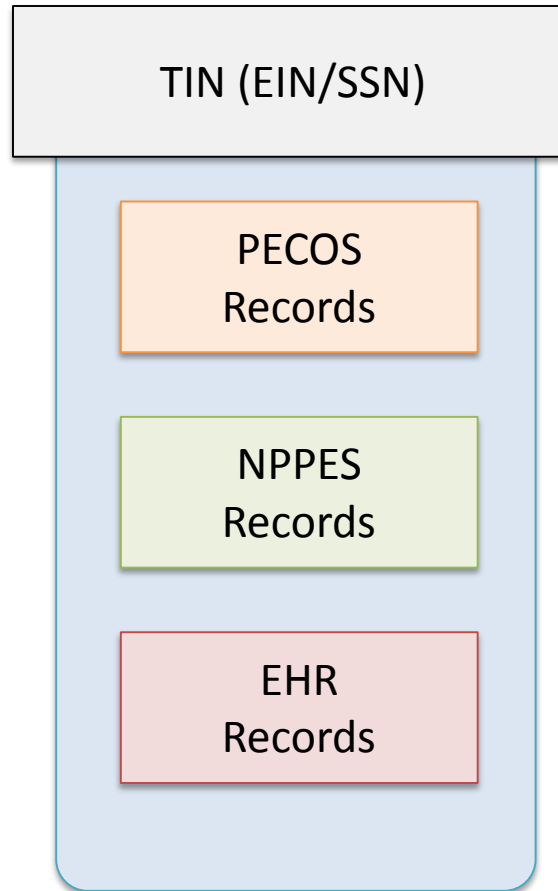
A Connection is, quite simply, ***a way to connect to a TIN (EIN or SSN)*** in order to **gain access** to PECOS, NPPES and HITECH records. There are two types of connections...

- ❖ **Employer Connection** – Connecting **your account** to an Individual Provider (SSN) or an Organizational Provider (EIN) in order to gain access to their records.
- ❖ **Surrogacy Connection** – Connecting two TINs together to allow a third party access on the TINs behalf.

Connections: Employer/Surrogacy



Tax Identification Number (TIN) as a Bucket



Employer Connection

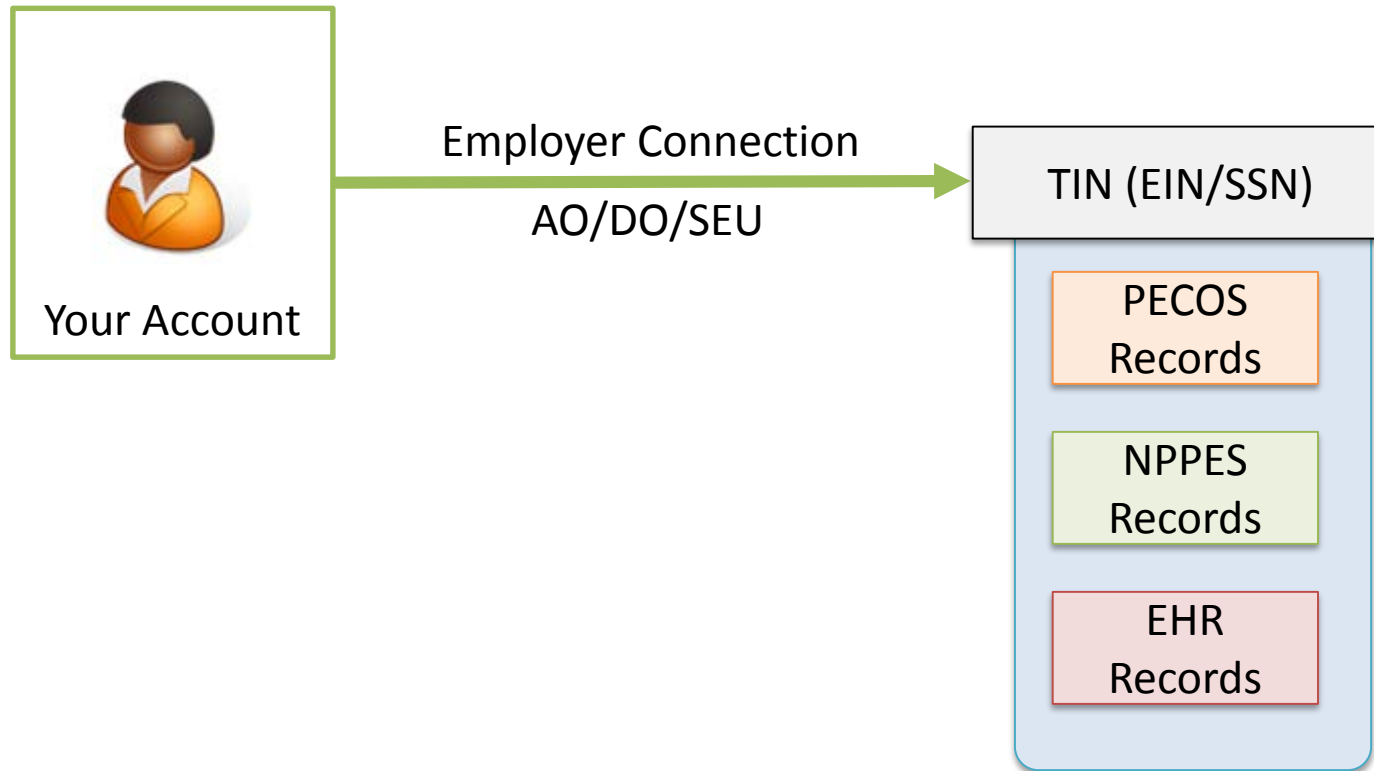
You can **“Add an Employer”** to connect to an Individual Provider (SSN) or an Organizational Provider (EIN) as one of the roles below.

You **must have a connection to a TIN (*EIN or SSN*)** in order to access their records or manage other users access levels.

❖ Employer Connection Access Types:

- Authorized Official (AO)
- Delegated Official (DO)
- Staff End User (SEU)

Employer Connection Example



What is an AO?

AO is an **Authorized Official** for a TIN (EIN or SSN) and is the highest permission level in I&A.

- ❖ AOs have rights to all business functions (PECOS, HITECH, and NPPES) for their employer.
- ❖ AOs can manage and approve DO and SEU users
- ❖ Can request and manage employer connections
- ❖ Can request and manage surrogacy connections
- ❖ Can approve or reject access on a system by system basis

I&A AO vs. PECOS AO

AO in PECOS	AO in I&A
Enroll, make changes and ensure compliance with enrollment requirements	Assign surrogacy and controls access to PECOS and NPPES records
<ul style="list-style-type: none">▪ CEO, CFO, partner, chairman, owner, or equivalent appointed by the organization.▪ may sign all applications (<i>must sign initial application</i>)	<ul style="list-style-type: none">▪ less restrictive AO requirements than PECOS▪ Automatically approved if listed as AO in PECOS. If not, CP575 must be provided to approve access▪ manage staff and connections for the employer▪ approve DO/SEU for the employer

What is a DO?

The DO is a **Delegated Official** for a TIN (EIN or SSN) and is the second highest permission level for I&A.

- ❖ DOs have rights to all business functions (PECOS, HITECH, and NPPES) for their employer.
- ❖ DOs can approve SEU users.
- ❖ A user can be an DO for one employer and a AO, DO or SEU for other employers.
- ❖ Can add and remove users who are SEUs for their employer.

AO/DO Approvals

I&A has built in automatic approval functions for the AO and DO requests in ***certain situations...***

- ❖ The SSN for the requesting account in I&A matches the Authorized Official or Delegated Official in PECOS.
- ❖ The SSN on the account for an Individual Provider matches the SSN on the NPPES record.
- ❖ If an automatic match is not available, You must submit to the EUS help desk a copy of the CP 575 [or approved alternate] for the organization for which you are connecting to. (To help expedite your request please write the I&A Tracking ID on the copy of the CP 575 you submit to EUS).

I&A DO vs. PECOS DO

DO in PECOS	DO in I&A
Appointed by the AO with authority to report changes to enrollment information	Authority to assign surrogacy and controls access to PECOS and NPPES records
<ul style="list-style-type: none">▪ ownership, control, or W-2 managing employee▪ multiple DOs permitted▪ may sign changes, updates and revalidations (<i>cannot sign initial application</i>)	<ul style="list-style-type: none">▪ delegated by the AO of org provider or 3rd party org▪ may add the employer to his profile, manage staff and connections for the employer▪ multiple DOs permitted▪ DO can approve SEUs

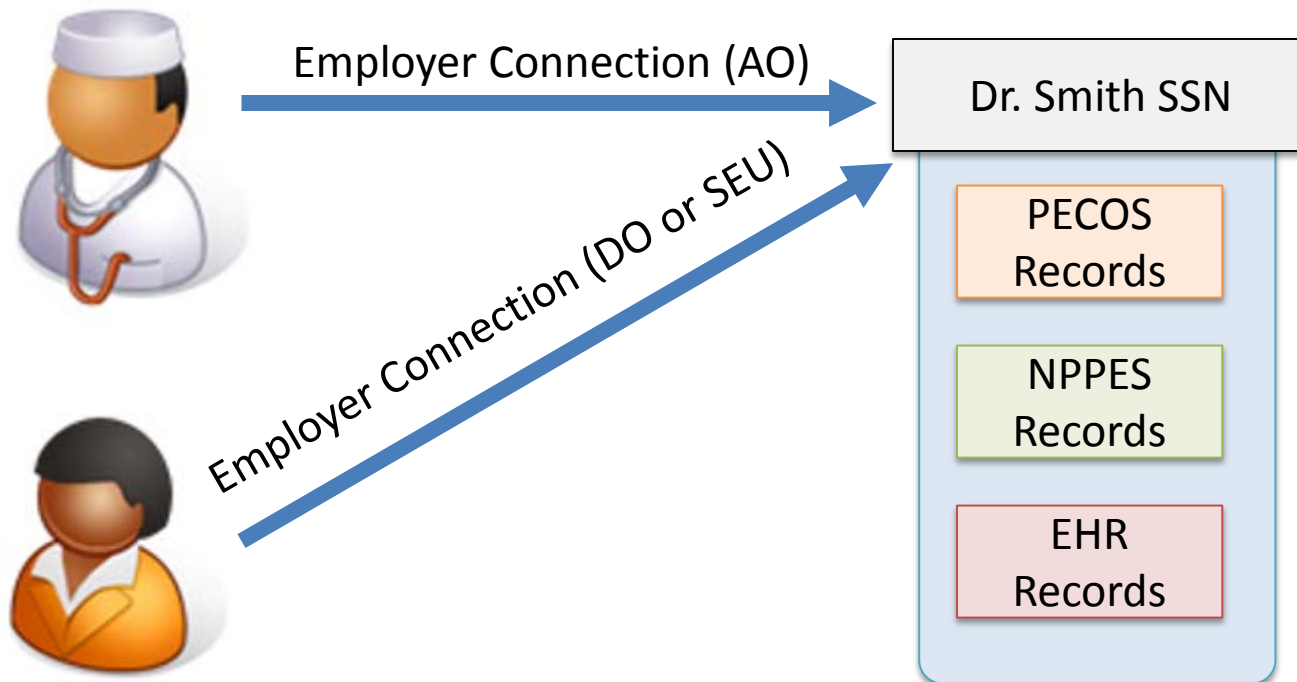
What is a SEU?

The **SEU** is a **Staff End User** and is the lowest permission level for I&A.

- ❖ Must be approved by a AO or DO of their employer connection
- ❖ Rights to business functions from their employer connections must be explicitly assigned
- ❖ Rights to providers that their employer connection has surrogate rights for and must be explicitly assigned access by an AO or DO of their employer connection

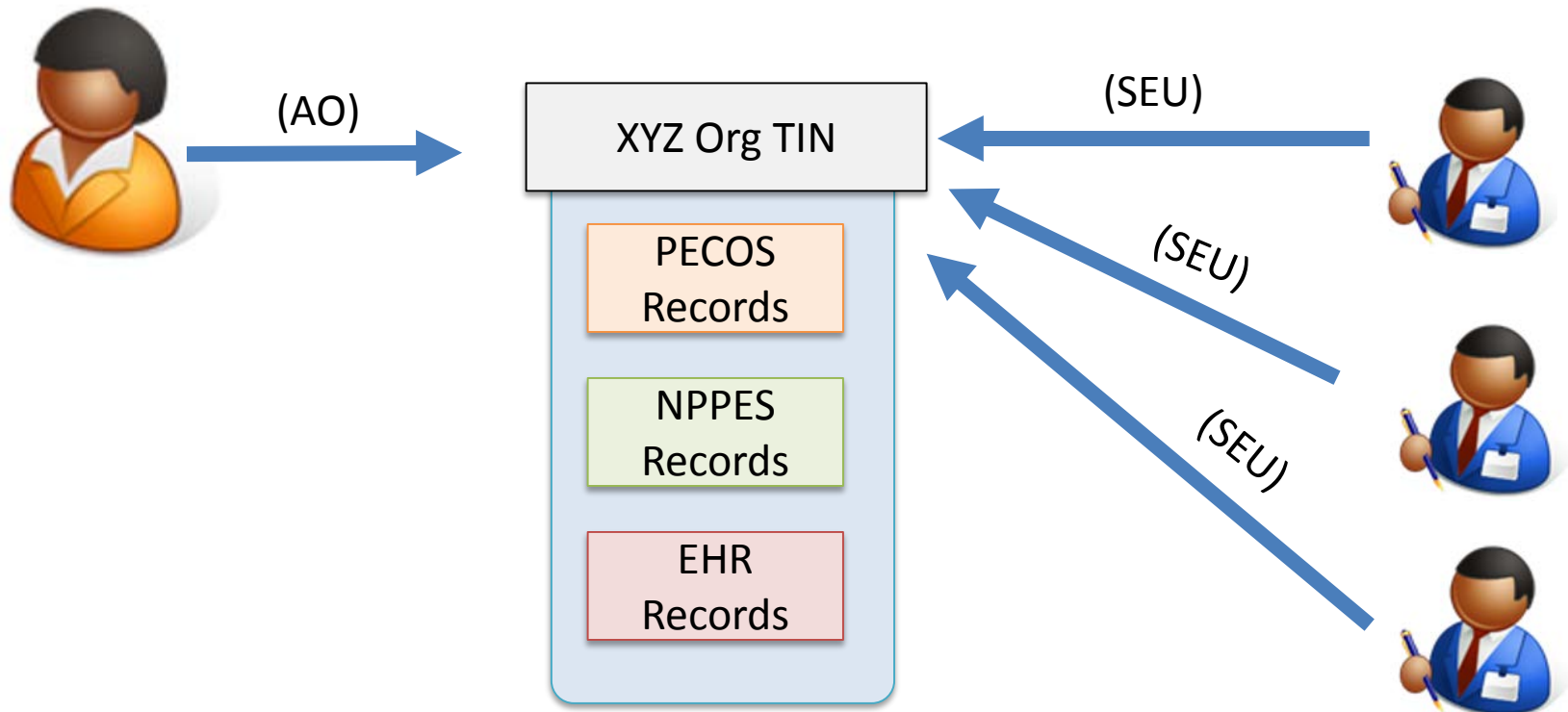
Employer Connection Example 1

Individual provider connects to his/her own SSN as AO – approves office assistant as DO or SEU to manage his/her records



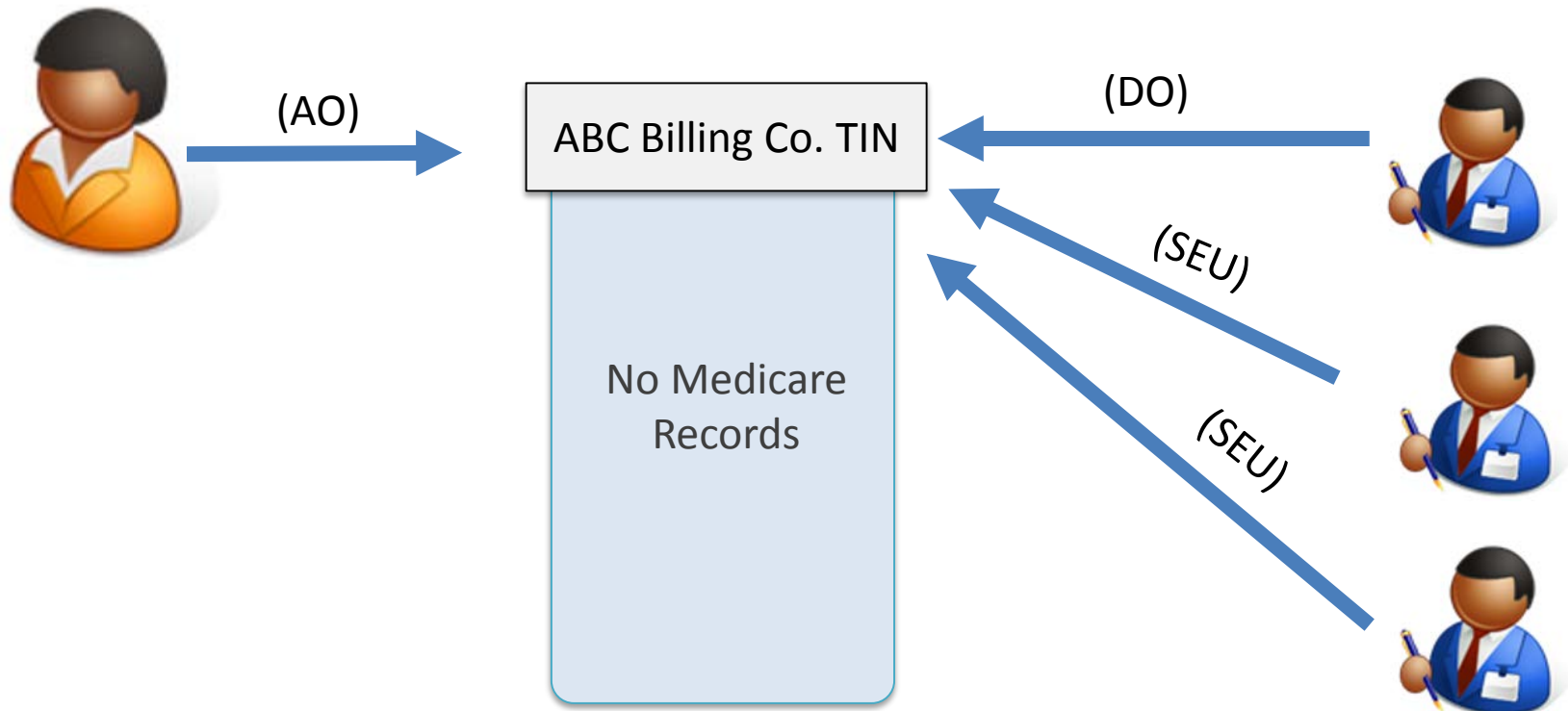
Employer Connection Example 2

Health group office manager connects to their TIN (EIN) as AO and approves three analysts as Staff End Users



Employer Connection Example 3

A 3rd Party Surrogate wants to set up an employer connections in order work on behalf of other organizations.



DEMO: Set up Employer Connection

Home

My Profile

My Connections

My Staff

Employer Information

Employer ▼	My Role with this Employer ▼	My Status with this Employer ▼	PECOS	EHR	NPPES
+ Carl's Org Two	Staff End User	Approved	NO	NO	YES
+ Schell, Carl	Authorized Official	Approved	YES	YES	YES
+ Test Care Diagnostics, Inc.	Authorized Official	Pending Approval Tracking Id A44-150	NO	NO	NO

If you wish to add an employer, click "Add an Employer".

Add an Employer

My Profile Tab – At the bottom, click “Add an Employer”

DEMO: Set up Employer Connection

[Home](#) [My Profile](#) [My Connections](#) [My Staff](#)

[My Profile](#) ► Add Employer Search [« Back to Previous Page](#)

Search for Organizations or Individual Providers that you wish to be associated with as your employer. You can search by entering one or more of the following: Organization Name, Individual Provider's Last Name, City, State, ZIP or NPI. If you are searching for a Provider to work on their behalf, please use My Connections.

Organization Name:

NPI:

Search

First Name:

Last Name:

City:

State:

SE - Select One ▼

ZIP:

Enter the entity information and click Search

DEMO: Set up Employer Connection

Home My Profile My Connections My Staff

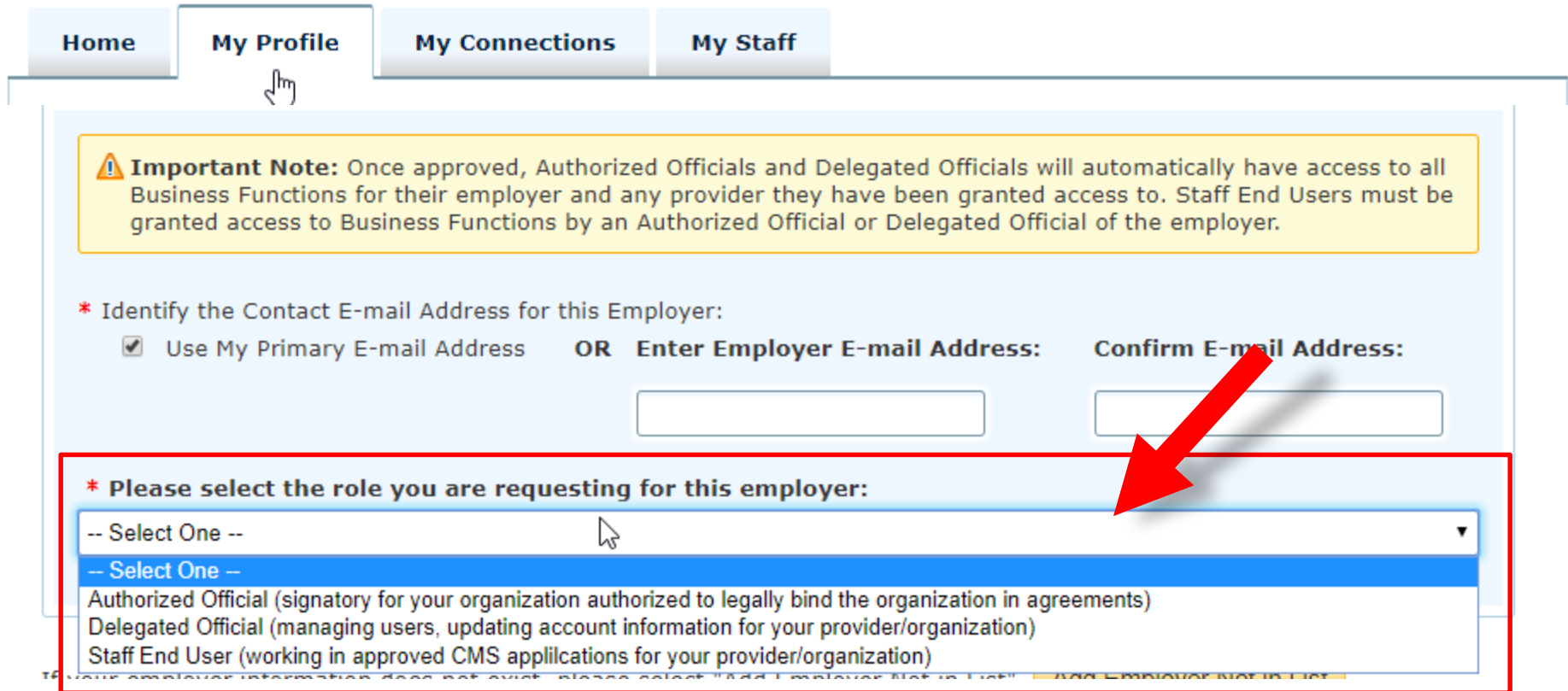
Search Results

	Name	Doing Business As	NPI	Address	View NPI	View Other Name
<input type="radio"/>	Test Care Diagnostics, Inc.			PMB 254, #90, Ave Rio Hondo Bayanon, PR 00961 United States	View NPI(s)	View Other Name(s)

If your employer information does not exist, please select "Add Employer Not in List". [Add Employer Not in List](#)

Choosing the employer will bring up the connection options.
You can also add an employer if they are not found.

DEMO: Set up Employer Connection



Home **My Profile** **My Connections** **My Staff**

Important Note: Once approved, Authorized Officials and Delegated Officials will automatically have access to all Business Functions for their employer and any provider they have been granted access to. Staff End Users must be granted access to Business Functions by an Authorized Official or Delegated Official of the employer.

* Identify the Contact E-mail Address for this Employer:

☒ Use My Primary E-mail Address **OR** Enter Employer E-mail Address: Confirm E-mail Address:

* Please select the role you are requesting for this employer:


-- Select One --

-- Select One --

- Authorized Official (signatory for your organization authorized to legally bind the organization in agreements)
- Delegated Official (managing users, updating account information for your provider/organization)
- Staff End User (working in approved CMS applications for your provider/organization)

Choose your role and click submit at the bottom. You must know the AOs contact info is selecting DO/SEU

DEMO: Set up Employer Connection

<div>HomeMy ProfileMy ConnectionsMy Staff</div>					
Employer ▼	My Role with this Employer ▼	My Status with this Employer ▼	PECOS	EHR	NPPES
 Test Care Diagnostics, Inc.	Authorized Official	Pending Approval Tracking Id A4484250	NO	NO	NO

Once requested, you will be automatically approved, the AO will approve you OR you will need to send in the proper documentation to EUS to be approved. You can find your tracking ID and status in the employer information table in the My Profile tab.

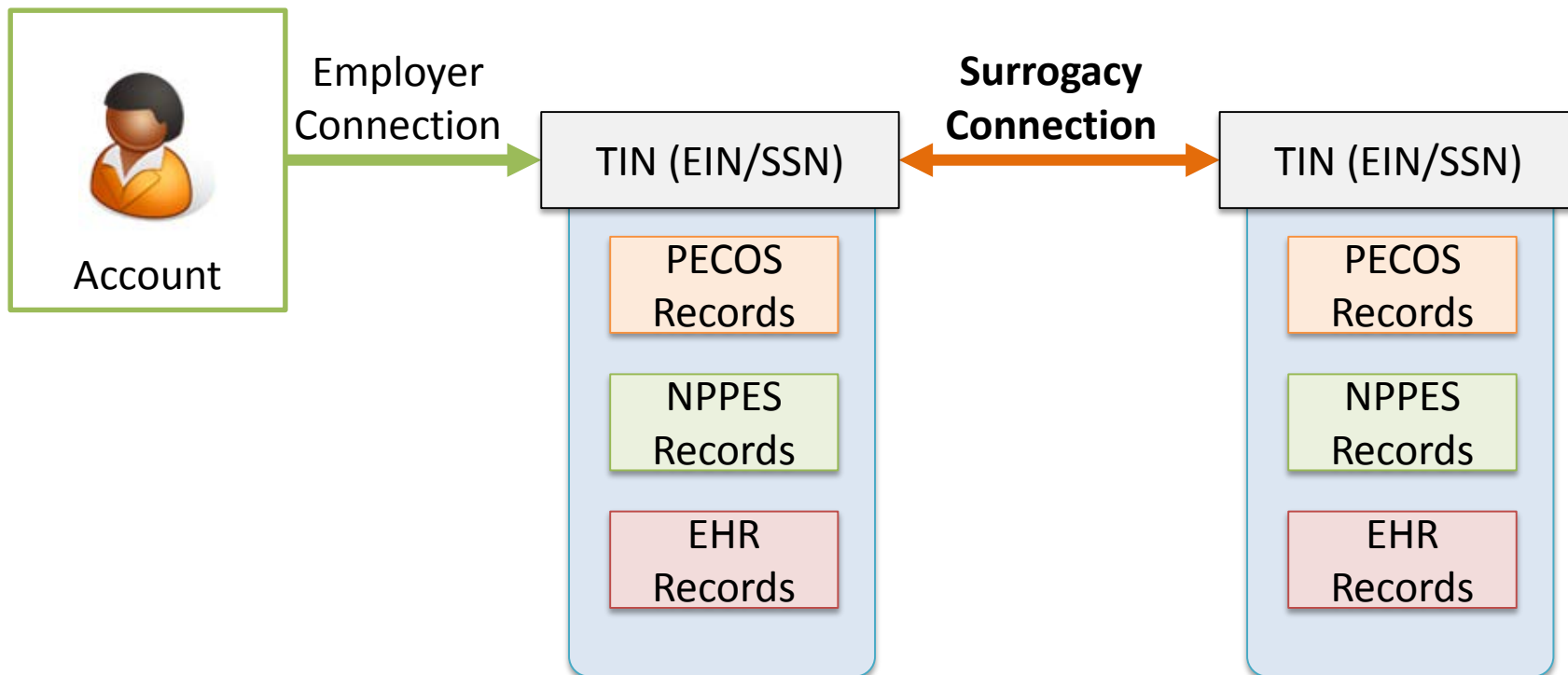
What is Surrogacy?

A surrogacy connection is simply a connection between two Employers (TINs) that allows the AO/DO/SEU users of the **initiating** Organization (TIN) to **access the records on behalf** of the **accepting** Organization(TIN).

- ❖ Providers can **designate Surrogates** to work on their behalf.
- ❖ Rights are **assigned by business function** (NPPES, PECOS, or HITECH).
- ❖ AO's and DO's can **initiate requests** for Surrogacy.
- ❖ AO's and DO's can **approve or reject Surrogacy Requests** for their employer.
- ❖ SEU's for surrogate will **only have rights if implicitly assigned** by one of their AO's or DO's

Surrogacy Connections

A surrogacy connection is simply connecting two TINs together. This allows users connected to the TIN access to the other TIN's records.



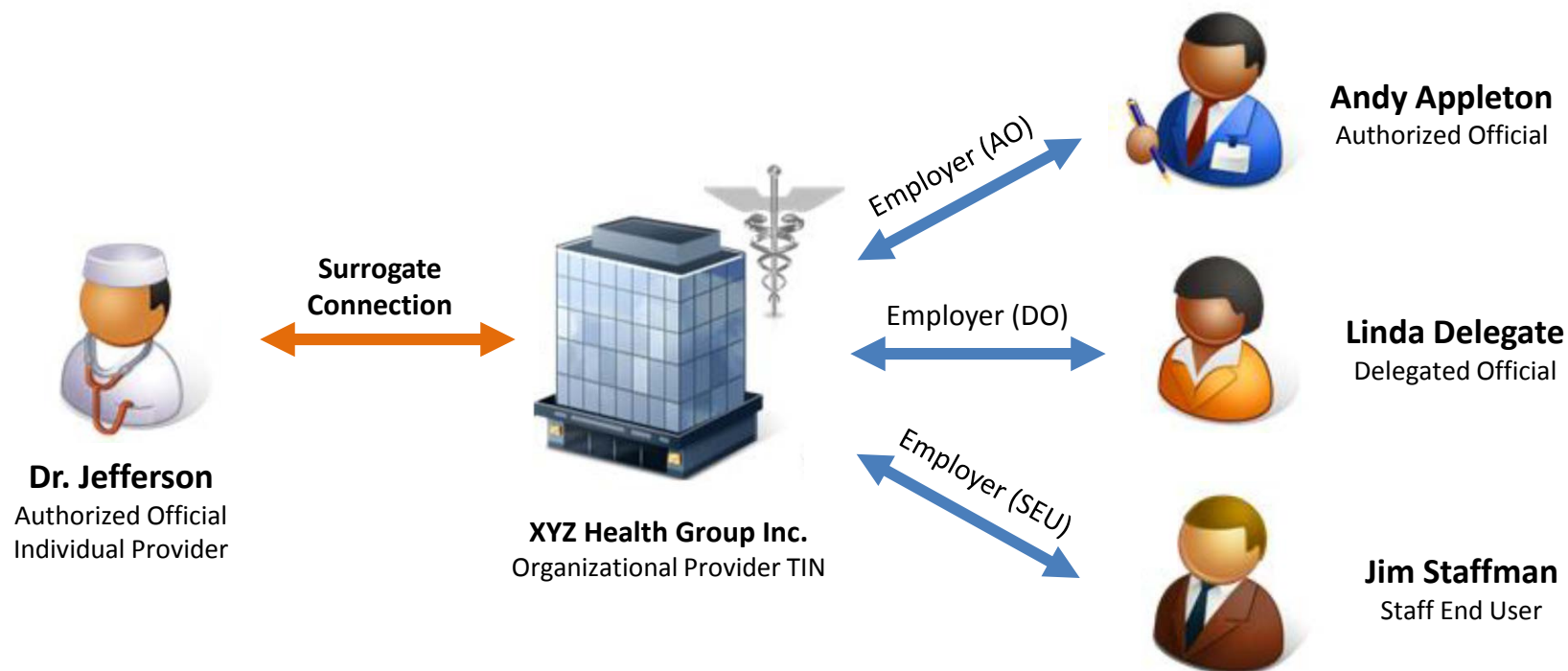
Surrogacy – One Level Deep

If you have a Surrogacy connection with **XYZ Org**, you will not have access to any other Organization (TINs) that **XYZ ORG** has Surrogacy with. You can **only access** the TIN you have an active surrogacy connection with. There are other options to gain access:

- ❖ Option #1: Become a Staff End user (SEU) for the other organization.
- ❖ Option #2: Set up other Surrogacy connections with the other organization.

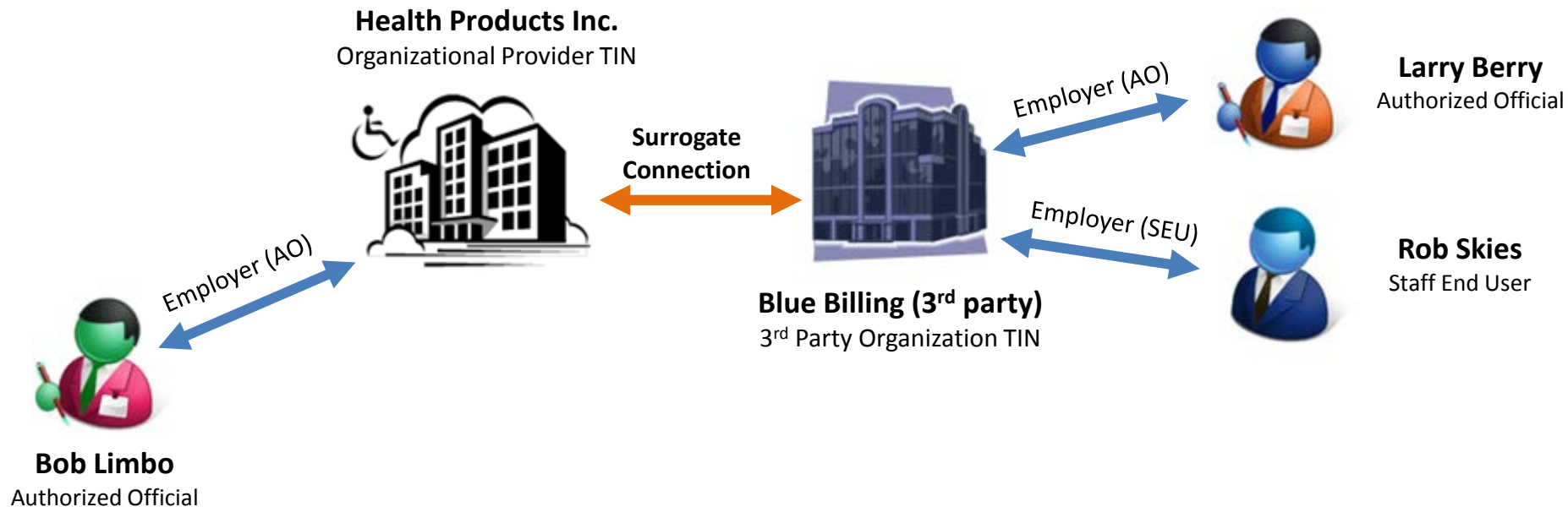
Surrogacy Connection Example 1

Individual Provider working for an Enrolled Group



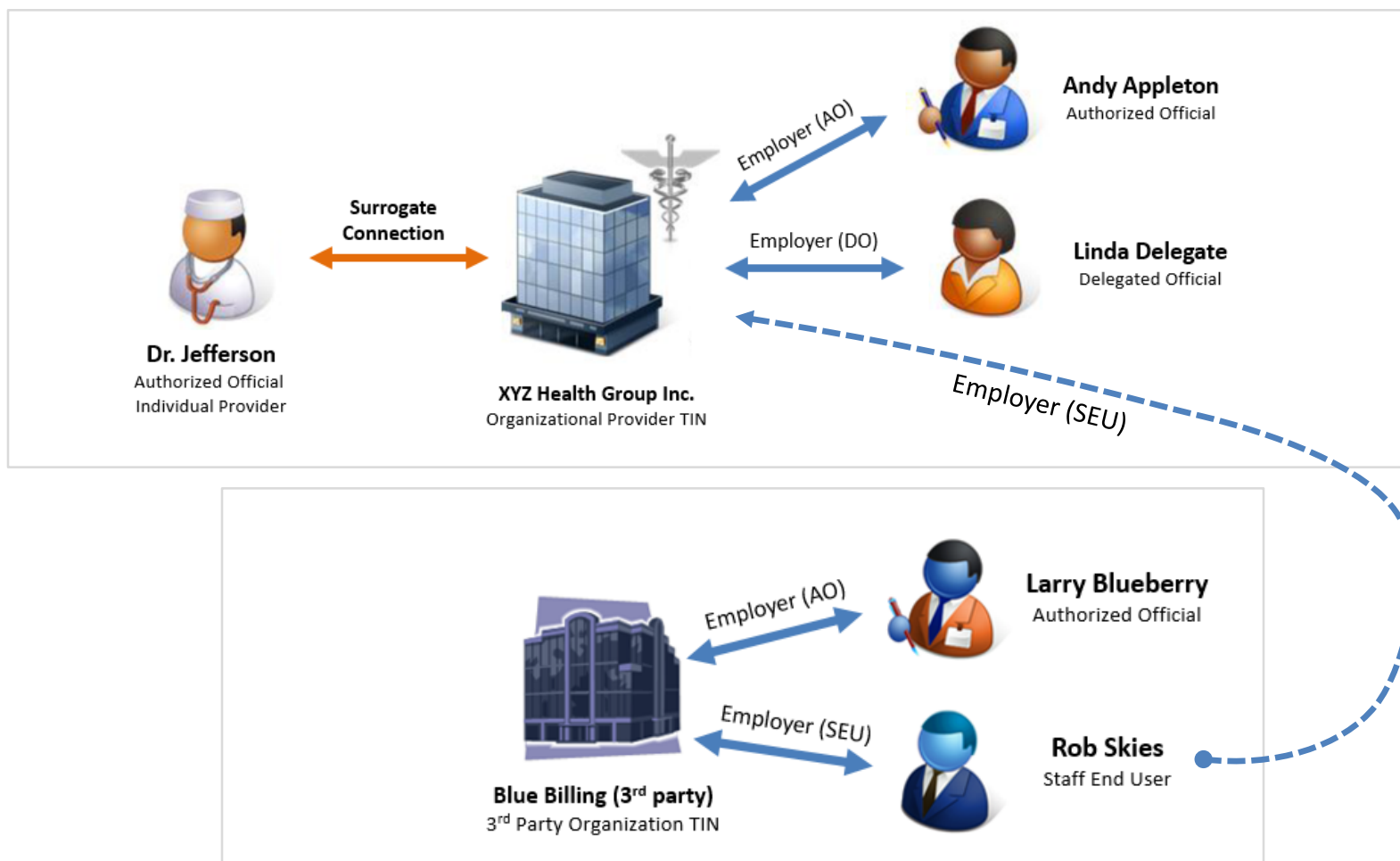
Surrogacy Connection Example 2

Organizational Provider hires **3rd Party Organization** to manage PECOS information



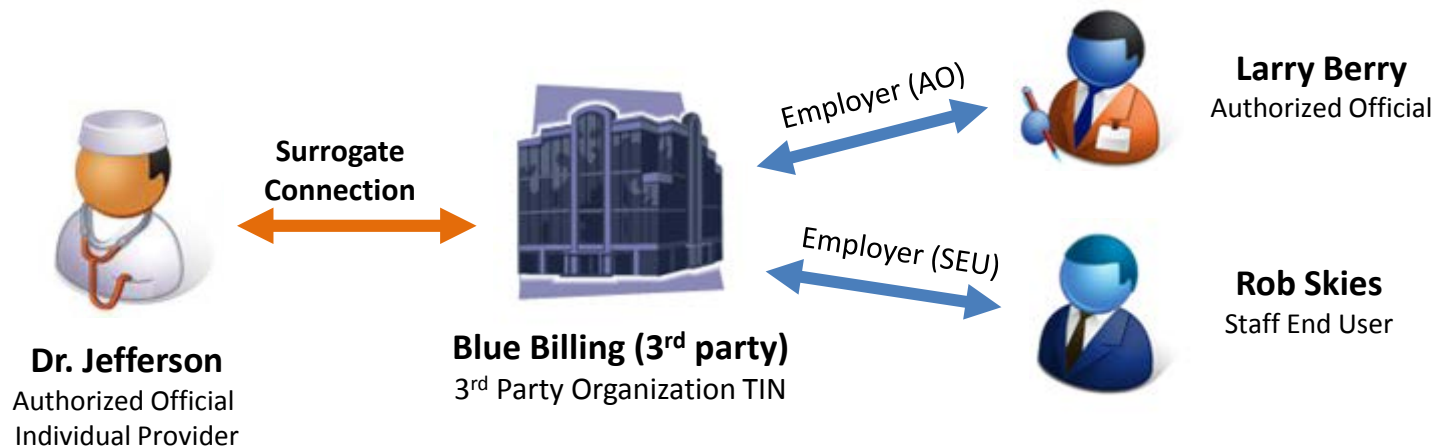
Surrogacy Connection Example 3

Group Practice hires 3rd Party Organization to manage PECOS information



Surrogacy Connection Example 4

Individual Provider Hires 3rd Party Organization to Update PECOS records.



DEMO: Set up Surrogacy Connection

Home **My Profile** **My Connections** **My Staff**

My Connections

Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

+ Third Party Org

Click the expand (+) button on the organization that you want to connect via surrogacy

DEMO: Set up Surrogacy Connection

[Home](#) [My Profile](#) [My Connections](#) [My Staff](#)

☐ Third Party Org
Third Party Org is a surrogate for the following providers:

Third Party Org has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. Use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Find Provider

Name	NPI	Tracking ID	Business Function	Access Status
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Click “Find Provider” to search for the entity you want to establish a surrogacy connection with

DEMO: Set up Surrogacy Connection

Home

My Profile

My Connections

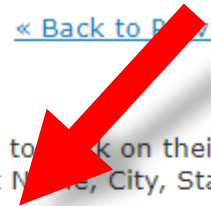
My Staff



My Connection ► Add Provider

[« Back to Previous Page](#)

Search for an Organization or an Individual Provider that you wish to be associated with as a surrogate to work on their behalf. You can search by entering one or more of the following: Organization Name, Individual Provider's Last Name, City, State, ZIP or NPI.



Organization Name:

NPI:

Search

First Name:

Last Name:

City:

State: SE - Select One ▼

ZIP:

Search for the entity to connect to.

DEMO: Set up Surrogacy Connection

The screenshot shows the 'My Connections' tab in the CMS interface. A table lists connections, with the first entry being 'TESTCHECK INC'. A red box highlights the radio button next to the entity name. Below the table, a section titled 'Select the business function(s) you would like to access on behalf of the provider:' contains three checkboxes: 'PECOS', 'EHR Incentive Program', and 'NPPES'. A red box highlights these checkboxes. Two red arrows are present: one pointing to the radio button and another pointing to the checkboxes.

Name ▼	NPI	Business Mailing Address
<input type="radio"/> TESTCHECK INC		PO Box 733 Woodville, TX 75979-0733

[View NPI\(s\)](#) [View Other Name\(s\)](#)

Select the business function(s) you would like to access on behalf of the provider:

- ☐ PECOS
- ☐ EHR Incentive Program
- ☐ NPPES

Select the radio button of the entity and choose the business functions you want access to. Hit continue...

DEMO: Set up Surrogacy Connection

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[My Connection](#) ► [Add Provider](#) [« Back to Previous Page](#)

⚠ You have requested to work on behalf of TESTCHECK INC as a surrogate. Once the connection has been approved, you will automatically be connected to all associated NPI's. Review the information listed below before you continue.

Name: TESTCHECK INC

Business Function(s) Selected:

- EHR Incentive Program

To send this connection request notification to a another e-mail address in addition to what is currently on file for this provider, enter the additional e-mail address below.

Additional E-mail Address:

You will see a confirmation page where you can add an additional email address for notification. Click Submit.

DEMO: Set up Surrogacy Connection

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☐ Third Party Org

Third Party Org is a surrogate for the following providers:

Third Party Org has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. Use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Find Provider

Name	NPI	Tracking ID	Business Function	Access Status
<input type="checkbox"/> TESTCHECK INC		S1673351	PECOS	Pending
		S1673691	EHR Incentive Program	Pending
		S1673353	NPPES	Pending

Your request is now pending on the My Connections Tab

Access Matrix

Role	Represent an Organization	Manage Staff	Approve/Manage Connections	Act on behalf of individual Organizational Providers
Individual Provider (AO)	Yes	Yes	Yes	Yes
Authorized Official (AO)	Yes	Yes	Yes	Yes
Delegated Official (DO)	Yes	Yes	Yes	Yes
Staff End User (SEU)	No	No	No	Yes
Surrogate	No	No	No	Yes

Lessons Learned

- ❖ Take your time and get it right the first time
- ❖ Talk with those at your organization that set up EHR
- ❖ Choose the right Authorized Official
- ❖ Initial set up is the most time consuming
- ❖ Explore hiring temp staff to set up connections
 - Access can be modified at any time
 - The AO can delegate authority to whomever they wish
 - Access can be dissociated quickly and efficiently
- ❖ You will continue to establish connections with new providers as they are hired

Lessons Learned

- ❖ This will be a culture change at your organization
 - Educate provider so they are ready to approve access requests
 - Do workshops with providers to get everything set up
 - Have instructions for providers to approve access requests
- ❖ Start setting up connections for providers Revalidating
 - As they come due for Revalidation:
 - Check the Revalidation Notification Center
 - Set up connections and/or submit application
- ❖ This doesn't have to be all or nothing
- ❖ Call the EUS, they are there to help with the I&A
- ❖ To learn how to use PECOS, check your MACs website

Resources

- ❖ I&A: <https://nppes.cms.hhs.gov/IAWeb>
- ❖ PECOS: <https://pecos.cms.hhs.gov>
- ❖ NPES: <https://nppes.cms.hhs.gov>
- ❖ End User Services (EUS):
 - <https://eus.custhelp.com>
- ❖ I&A Online Help:
 - <https://nppes.cms.hhs.gov/IAWeb/help/help.do?topicName=LoginHelp>
- ❖ I&A FAQs
 - <https://nppes.cms.hhs.gov/IAWebContent/FAQs.pdf>
- ❖ I&A Quick Reference Guide:
 - https://nppes.cms.hhs.gov/IAWebContent/Quick_Reference_Guide.pdf



Questions?