



Creating and Verifying Your National Provider Identifier Call

Moderated by: Diane Maupai
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Operator: At this time, I would like to welcome everyone to today's Medicare Learning Network® event.

All lines will remain in a listen-only mode until the question-and-answer session. This call is being recorded and transcribed. If anyone has any objections, you may disconnect at this time. I will now turn the call over to Diane Maupai. Thank you. You may begin.

Announcements & Introduction

Diane Maupai: Thank you. This is Diane Maupai from the Provider Communications Group at CMS in Baltimore, and I'm your moderator today. Welcome to this MLN Connects Call, Creating and Verifying Your National Provider Identifier.

It is now easier to create, verify, or look up your National Provider Identifier, or NPI, using the National Plan and Provider Enumeration System. During this call, an expert will discuss improvements to this system. You will have an opportunity to ask questions following the presentation.

Before we get started, you received a link to the presentation in your confirmation email. The presentation is available at the following URL: go.cms.gov/npc. Again, that URL is go.cms.gov/npc.

I would now like to turn the call over to Srinu Kunnam from CMS contractor TurningPoint Global Solutions. Srinu is the Requirements and Quality Assurance Manager for the NPI system. He'll be talking about new features and provide several tips and tricks so you can use the system more effectively. Srinu?

Presentation

Srinu Kunnam: Thank you very much, Diane. Good afternoon, everyone. We are on slide number 1 now. As we go along, I'll announce the slide number, that way you can follow along.

As we all know, NPPES allows you to create NPIs. If you go to the second slide. The background is, let's say you are a new provider and you want to start your practice. The first thing you need is NPI before you start billing your insurance companies. So you go into NPPES and then you request your Type 1 NPI, if you're an individual provider, or if you're a group practice, you ask for an organization NPI.

This system has been in place for the past 10 years. And to access NPPES, PECOS, or HITECH, we have one authentication system. That is the Identity & Access Management System. In today's presentation, we recently



launched NPPES – the new version of NPPES. We call it NPPES 3. So we’re going to talk about all of the new features, cool features in NPPES 3. And, also, we’ll provide you some tips and trick to make your life easier. At the end, we’ll have a question-and-answer session.

Launch of the New NPPES 3

Let’s go to slide number 3. Approximately 2 months back, I vividly remember that 12th of May, we worked the entire weekend and launched the new NPPES. We launched this 6 weeks ahead of the original schedule. As human beings, we get only a few chances to do great things in our lifetimes. And this is one of the great things we did, and we are proud of it.

There are several cool features in this NPPES 3 system. The first one is it is modern. If you look at Google or if you look at Amazon.com and if you look at NPPES, you won’t see any difference. It’s very modern. And, also, it gets very responsive. What that means is the other day one of my daughters asked me, “What do you do?” I said, “I work on NPPES.”

And then she – I was outside with them. And, then, she asked me, “Can you show me on your mobile phone?” I put it up on my smartphone and then the screen fit the size of the system. So, it adapts to the screen size. Let’s say you’re binge watching something on Netflix, and then you finally realize that, I have to get my NPI. You can switch your screen on your tablet and then get an NPI within a few minutes. But – thanks to the responsive design.

The next one is a single authentication system. If you remember the whole system, let’s say you manage 10 providers: 9 doctors plus 1 for your group practice. You have to remember 10 user IDs and passwords. Of course, we all have great memories, right? We don’t write down our user IDs or passwords.

Not anymore. You don’t have to worry about remembering all your user IDs and passwords. All you have to do is remember one user ID and password. With that, you can log in to I&A, you log in to NPPES, you can log in to PECOS and you can log in to HITECH. Previously, PECOS and HITECH aligned their support of surrogacy. Now, NPPES is also supporting surrogacy. We are going to go in to the details in a bit.

In the previous system, you had to finish your entire NPPES application in one sitting. So imagine that, let’s say, your doctor asks you to submit NPI request. And then you start filling in the application form and you suddenly realize that you don’t understand the doctor’s handwriting. But, unfortunately, he’s busy in a surgery.



So you have to start all over again. Instead, what you can do is you can save and come back the next day once you have the information. You can do it over several days. It's called a partial save.

The next cool thing about NPPES is, wherever you see grids or tables – wherever you can see grids or tables, you will be able to do at least two things. One is you can sort by clicking on the column title or you can also do filtering. That is called the smart filter.

As you type the data in the grid or the table, it will automatically filter. You can try it on any filter. As soon as you log in to the main page, you will see that feature. If you look at the practice location address page, let's say you want to look at all the practice locations in Honolulu, Hawaii. All you have to do is start typing "Honolulu" and then it will filter automatically.

The next thing is knowing doctor practices in various locations. I know a doctor who practices in Virginia, in Maryland, in Washington, D.C. Previously, we allowed only one practice location. The new system? You can put an alternate practice location – addresses if you want. All you have to do is identify your primary practice location.

The next one is surrogacy. Surrogacy – in simple terms, what it means is you as an office manager or a staff end user can remember just one user ID and password and still manage multiple providers' information. All you have to do is in I&A, make sure that you're a staff end user, authorized official, other delegated official for your provider. And then when you log in to NPPES, you will see all the provider information on the main page grid.

The third bullet from the bottom on slide number 3 is smart context-sensitive help. Let's say you are on the Practice Location Address page, and then you see a checkbox that says, "Military Address," and you don't understand what that is. When you hit the Help button, it will show you the help information that is relevant to that page. So depending on the feature you are on, depending on the page you are on, you will see only the help that is necessary for that screen.

The second bullet from the bottom on slide number 3, address standardization updates. What this means is, let's say you put in an address and then it can be standardized. As long as it can be standardized, even if you choose to pick "input address" as your input address, you will still be able to enumerate your application right away.



So, here is an example. We report No. 1 Jefferson Street. And then the address standardization software comes back and says, 1 West Jefferson Street. You can pick 1 West Jefferson Street, and then that will enumerate your application and you will get it right away. Or, for some reason, even if you choose 1 Jefferson Street, since your address can be standardized, we will assume that you wanted to pick that address for a reason.

But we will go ahead and enumerate your application right away. In the previous system, it was getting routed to the help desk and then it was taking a while. Not anymore. As long as your application passes address standardization, there are no duplicates with taxonomy and then you didn't put in a duplicate NPI for the provider, it should get enumerated within a few minutes.

The last item on slide number 3 is smart filters. Wherever you see a grid or a table, you can start entering just by – just like what you do in Google search. As you type, you can see the results in Google search. Just like that, in NPPES also, as you type what you want in the practice location address or in the NPI main page, it will automatically filter. Let's say you have a thousand doctors to manage. You know the doctor's last name is Smith. All you have to do is start typing "Smith," and then all the Smiths will appear on the main page grid.

Let's go on to the next slide, slide number 4. I'm not done. There are more cool features to see.

So one is taxonomy entry. Taxonomy is important information about providers. We made it very easy for you to import that information. All you have to do is just start typing. Let's say you want to pick pediatrics as a specialty for your provider. As soon as you start typing "pediatrics," the list will be filtered to pediatrics. It could be pediatric cardiology or pediatric endocrinology, whatever the case may be. It will filter and show you only the relevant taxonomies. In the previous system, it took multiple screens to capture the information. We may it very easy for you to pick the taxonomy in the new system.

Let's say – the next item on slide number 4 – the second bullet is – let's say you work for a teaching hospital, and then 13 new residents are starting their residency on July 1st. You have two options. You can put in 13 new NPI applications on screen or you can use our bulk feature. Previously, we had .XML. And if you're not comfortable using .XML, you can always use CSV in the new system.

CSV is a feature off of Excel. What you do is you put in the data and then save it as a CSV file and you upload it. We also have a template on the EFI page where you can download and see the data that is there. And, then



you can modify it based on your accounts. That is the second bullet, allowing CSV file format for the bulk upload.

To be able to upload our bulk CSV files or XML files to use –to be allowed to be used in the future, what you have to do is you have to become an EFI organization. That is the Electronic File Interchange organization. And once your organization is approved, then you become a new EFIO User. For that, you have to submit a signed declaration statement. That certification statement – we have made it very easy.

What we have done is we have prepopulated all the information you have to fill in. You can download it and then you can just sign it and then mail it in. As soon as we crosscheck all your information, you will get EFI access. Then, after, you can use the bulk upload feature. This feature is available as soon as you log in to NPPES and go to the main page and see the links at the bottom of the screen.

Right now, the – we call it the data dissemination file. NPI information is available to the public in data.cms.gov. We are going to augment that and provide the new information. Remember, we are capturing additional practice locations. That is going to be available. And we'll be also capturing additional other names for our organization providers. That is also going to be available.

The third thing is that – which is the second bullet from the bottom – the end point. End point is for exchanging information between providers in a secure way. Okay, for example, your primary care physician wants to send some blood test results to your cardiologist. You have two options. You can print out everything and take it with you or you can ask the provider to send it to your specialist in a secure way. Okay, this is for secure – this is for secure communication between providers. You don't want to send it by gmail. Obviously, it can be hacked and you don't want your information to be out there on public domain.

So, instead what you do as providers – sign up for End Point. We can capture the information. Okay. for Dr. John Smith, this is his direct address. And then you can give this information to your primary care physician, and then he can transfer this information in a secure way to your specialist. That is the end point. In essence, what we are going to do is we're going to capture the information because we want NPPES to be a provider directory with all the information about all the providers in the U.S.



The last one is multiple practice location. We talked about that. If a doctor practices in multiple locations, in the previous system, we allowed just one practice address to be captured. In the new system, we understand the requirements of the providers nowadays. So we capture as many practice locations as the doctor practices in.

NPPES 3 Tips and Tricks

Okay. We are going to go to slide number 5, which is tips and tricks. What are some of the tips and tricks you can use to finish your application very quickly? I know we are all busy. So, we want to be able to finish our NPPES application, the new applications and change requests, the most efficient way possible. So we have a thing like that. So we have provided lots of cool features that you can use to get through your application very quickly.

The first one is on the homepage of NPPES. Let's say you forgot your user ID or password. You no longer have to call the help desk. You can click the Forgot User ID or Password link, and then it will ask you a few questions. And then as long as you answer them correctly, you can be given your user ID and password. That way, you don't have to even make a phone call. It's available for you right away.

Let's say you have – in the second bullet on slide number 6 is, let's say you have several providers to manage and all of them are organizational providers. In the old system, you had several user IDs to remember. In the new system, you have to associate those user IDs, those providers, with your account. Remember, in the new system, you have only one user ID and password to remember. So you need to associate all of those organizational providers to your account. We've made it easy.

What you do is you log in to NPPES with your I&A account. And as soon as you log in, you click the Access Type 2 NPI button just below the main page grid. Once you do that, it will ask you for the EIN of your provider. Once you put in the EIN, it will ask you for the NPI of the provider and also the user ID and password from the old system.

If you enter all these correctly, then you will be automatically associated with the provider as a staff end user. You will get two chances to get it right. Then, after, if you still don't remember, you can ask one of your colleagues to try the same thing with their own user ID and password from the old system or you can always call our help desk. But we encourage you to try this feature because it is used by several of the surrogates already.



Let's say – there are two examples when it comes to organizational providers. Bullet number 3. Let's talk about one of those scenarios. Let's say you have – you work for Hopkins. You already have several NPIs under that EIN. And if you want to apply for one more NPI, let's say, for intervention cardiology, in that case, since your hospital already has the EIN and the NPI associated with that, you have to be in some way associated with that organization in I&A.

You can be an authorized official, delegated official, and staff end user. For existing NPIs, for existing Type 2 providers, you have to be associated with that EIN in I&A. Only then you can request new NPIs for the organization providers.

Third is bullet number three on slide 6.

And, then, on the slide – slide number 6, second from the bottom. We evented this scenario. Let's say you have several providers for whom you need to request NPIs. It can be a new NPI request or it can be a change request. Here's an example. Let's say there's a group practice that is moving from one location to the other. You have two choices. You can put in practice location change request for all those 10 providers using the UI one by one. Or you can use the bulk upload feature. It can be in an XML format or CSV format.

The last bullet is one of those connected to the third bullet. So you remember we talked about an existing hospital asking for another NPI under the same EIN. That is bullet number 3. Bullet number 5 is, let's say there's a brand-new hospital and you want to get an NPI for the hospital, and that EIN does not have an NPI yet.

In that case, you can go into NPDES, log in using your I&A account, and, then, what you can do is you can request a brand-new NPI, another EIN, for the hospital. Once you do that, you'll automatically become a staff end user. Thereafter, you can submit a change request or any other changes in the future. Okay. Let's go on to the next slide, slide number 7, more tips and tricks.

We talked about partial save. You don't have to submit and NPI application or a change request in one sitting anymore. You may wonder how the data gets saved. If you click any of the navigation buttons, your data will be saved. Let's say you hit the Next button from the profile page and go to the Practice Location Address page.



Your data will be saved. Even if you shut down the machine, your data is already there. Also, you can save your progress and then come back and finish it any other time.

Let's say you start an application, and then somebody else from your group already submitted an application for the provider. What you can do is you can go on, delete your application. In case of new requests, you can delete. In case of change requests, you can do an undo of your changes and then start from scratch. That is bullet number 3 on slide 7.

And then, we talked about smart filtering. Just like Google search, as you type in the Filter button or filter box, the grid will automatically filter the results just to show you what are –information you want to see. But going back to the example, let's say you want to look at all the providers in a specific location. Start by typing the street address or start typing the city name. Once you do that, it will automatically filter and show you only the providers who work – or practice in that street or city.

The third – the fourth item from the bottom on slide number 7 is, on all the table and grids, by clicking on the column name, you can sort the data. Let's say you want to look at all the information for providers who practice in Baltimore. You can use the smart filtering feature or you can just sort by the city name. And it will report Baltimore up front, and then you can look at all the providers.

The third bullet from the bottom is – there's where you see the I – the yellow I button. What this means is you have – you have more information. If you just hover over, it will show you more information about that feature.

The second bullet from the bottom on slide 7 is the online help. Online help is very good and it is context-sensitive. What it means is, depending on the screen you are on, you will see the information that is relevant to the screen. Let's say you are on the Contact Person page and you want to get more information on what email address you want to put in that screen.

What you do is click the Help button, and then it will show you exactly what email address you need to put in. In this example, the email address you want to put in is the email address you want to get our correspondence from. Because as soon as an NPI gets enumerated, that is the address we are going to use to send your NPI information.



The last bullet on slide number 7 is, let's say you want to use our bulk feature and you don't know where it is because in the old system, it used to be on the login page.

In the new system, we want to make sure that we use one login ID for everything. So as soon as you log in, at the bottom of the main page, you will see an option to upload or request to use our bulk upload feature.

Okay. Now, we are on slide number 8. That is the question-and-answer session. Now, I will turn it over to Diane. Thanks, Diane.

Question & Answer Session

Diane Maupai: Okay. Thank you, Srimi. We're now going to get ready to take your questions. As a reminder, this call is being recorded and transcribed. All right, Dorothy, We 're ready for our first caller.

Operator: To ask a question, press star followed by the number one on your touch-tone phone. To remove yourself from the queue, press the pound key. Remember to pick up your handset before asking your question to assure clarity. Once your line is open, state your name and organization.

Please note, your line will remain open during the time you are asking your question, so anything you say or any background noise will be heard in the conference. If you have more than one question, press star, one to get back into the queue, and we will address additional questions as time permits.

Please hold while we compile the Q&A roster. Please hold while we compile the Q&A roster. Your first question comes from the line of Sheila Roberson. Ms. Roberson, your line is open.

Sheila Roberson: Hello. Okay. Thank you for taking my question. First off, the presentation was really hard to hear on the phone because it was kind of echo-y. So, you may have addressed this, but I need to ask. We're having issues in the new NPPES system when we go in. We're an existing provider and have been for a while. If we need to make changes, it's not accepting our changes, and we're having to submit them by paper. Is that being addressed?

Diane Maupai: We're going to take – or, you're going to answer?

Carl Schell: Yes. So, Sheila, what kind of changes are you trying to do currently?



Diane Maupai: Sheila

Sheila Roberson: I'm here. Sorry.

Diane Maupai: What kind of changes...

Sheila Roberson: We're trying to change our tax ID numbers. We – and they wouldn't accept that. They said we had to do it by paper, and they said that the system was having issues with changes, so everything had to be submitted by paper.

Srini Kunnam: This is...

Sheila Roberson: It changed, and then it reverted back. So ...

Srini Kunnam: This is –for organizational providers, correct?

Sheila Roberson: I'm sorry. I couldn't understand you.

Srini Kunnam: This is for Type 2 providers, right?

Diane Maupai: Organizational providers.

Sheila Roberson: Yes, we're an organizational provider.

Carl Schell: And just so that we know, did you also contact the help desk already and they're telling you that it's your responsibility to put it in as – by paper?

Sheila Roberson: Yes.

Srini Kunnam: Well, we'll take a look at that.

Sheila Robertson: Okay.

Carl Schell: Right. So what we can do is we'll take that back and contact the help desk and see what kind of guidance they're giving on that. And, then, can you hold on one second, please?



Sheila Roberson: Absolutely. Thank you.

Diane Maupai: Sheila – I mean, Sheila, on slide 9 of the deck, at the bottom, you'll see an email address and a phone number for a help desk. If you'll contact them, that way when we get an answer, we can reach back out to you.

Sheila Roberson: Yes. Because I guess they were telling our people that there's some kind of system error. It's a known system error and they – you had to submit it by paper. So – but, we will send that email. Thank you.

Srini Kunnam: Yes. We got that. We'll check that. Yes. Thank you.

Diane Maupai: Okay. Thank you.

Operator: Your next question comes from the line of Jean Akins.

Jean Akins: Hi. Thank you for taking my call. I guess my call is a similar question to the previous question. And that is, with the new tax ID and a submission for a new group NPI, how long should that processing take?

Srini Kunnam: New NPI?

Diane Maupai: Go ahead.

Srini Kunnam: Jean, the new NPI request – this is for organizational providers also. Correct?

Jean Atins: It's for a group practice.

Srini Kunnam: Yes. Does this group practice already have an NPI?

Jean Akins: They have individual NPIs.

Srini Kunnam: Dual NPI under the same EIN?

Jean Akins: It's a brand-new group NPI. They did not previously have a group NPI.

Srini Kunnam: Did you use the standardized address?

Jean Akins: Did I use – I'm sorry...

Srini Kunnam: When you put in the address for mailing address and practice location, did you pick the standardized address?

Jean Akins: Yes.

Srini Kunnam: In that case, it should have gotten enumerated right away. So when did you submit that?

Jean Akins: Two weeks ago.

Srini Kunnam: Okay. So...

Jean Akins: And on the website, when you look at it, it says that it's pending.

Srini Kunnam: In some cases, it can take up to 30 days. So, we will check...

Jean Akins: It'll take 30 days.

Srini Kunnam: Yes.

Jean Akins: Okay.

Srini Kunnam: Thank you.

Diane Maupai: Thank you, Srini.

Operator: Your next question comes from the line of Betty Cole.

Betty Cole: Hi. My name's Betty Cole from Benefis Medical Group. And I'm wondering if the taxonomy for an NP needs to be nurse practitioner or if it can be changed to their specific specialty that they're working. For instance, I have an NP working as a hospitalist. Can her taxonomy change to a hospitalist?

Carl Schell: Just one second, please. Hi, Betty. As far as the taxonomy goes in NPPES, this is Carl Schell from CMS. We actually – we would like you to choose whatever fits best to the description of what they're doing. It's



not – there’s nothing in NPPES that really defines any sort of future action based on that specialty. It’s just more of describing what that person is doing. So that should be fine.

Betty Cole: Okay. Terrific. Thank you.

Vani Annadata: Okay. This is Vani Annadata from CMS. And you also have the option of entering the secondary taxonomy. So, you could – you can enter more than one taxonomy as part of your NPI.

Betty Cole: Sure.

Diane Maupai: Thank you, Vani.

Operator: Your next question comes from the line of Susan Lau.

Susan Lau: Yes. Hi. Thank you.

We have an existing NPI. But I need to add a tax ID number because I’m trying to add that into my PECOS, and it shows up saying that the information does not match the NPPES info. How do I go about doing that?

Carl Schell: Hi. This is Carl again. So what you’re saying is that when you’re in PECOS, that you are trying to enter in your EIN or your TIN, and your legal business name and it’s – and there’s a check that it checks with NPPES, and you’re saying that it’s not matching. Is that correct?

Susan Lau: Well, it’s not in NPPES. So, I need to add a TIN and new location to what is existing under my NPI because, you know, I had an NPI before and, you know, my location and TIN was different at that time.

Carl Schell: So, I’m just trying to understand here in the room still. In NPPES, you already have one TIN with one NPI in there.

Susan Lau: That’s right. That’s right.

Carl Schell: And you want ...

Susan Lau: I need to...



Carl Schell: You want to add another TIN.

Susan Lau: ...add – yes.

Carl Schell: So, does this new TIN – it does not have an NPI yet, correct?

Susan Lau: The new TIN – no. It doesn't have a – do I need to have an NPI for that new TIN? It's just a solo practice.

Carl Schell: Yes, you would. You would do a Type 1 NPI – I'm sorry – Type 2 NPI for that new – for that new TIN and request the new – yes, so, request the new NPI. And, then, once that's in there and you're enumerated with an NPI, you should be good to go in PECOS.

Susan Lau: I see. So, I need to request a Type 2 – a new Type 2 NPI...

Carl Schell: Correct.

Susan Lau: ... even though I have an existing NPI? For the new TIN? Okay.

Carl Schell: Right. Because that exiting NPI is linked directly to that other TIN.

Susan Lau: I see. Thank you.

Carl Schell: Yes.

Diane Maupai: Thank you, Carl.

Operator: Your next question comes from the line of Brandon Voltzke.

Brandon Voltzke: Hi. This is Brandon Voltzke from Allina Health System. I've got a question for Type 2 NPIs for – under the section of identifiers. Under Issuer, we used to be able to choose Medicare. That is no longer an option.

Srini Kunnam: Yes. That is correct, Brandon. We don't capture the Medicare information anymore because in some cases, it was CMS, their SSN or TIN. So we didn't want to publish that since that information gets

published. So we don't capture Medicare other identifiers anymore. You don't have to enter that anymore. It's an optional section anyway.

Diane Maupai: Thank you, Srin.

Brandon Voltzke: Okay. Thanks.

Operator: To ask a question, press star followed by the number one on your touch-tone phone. To remove yourself from the queue, press the pound key. Your next question comes from the line of Tracy Childress.

Tracy Childress: Hi. Good afternoon. Thank you for taking my question. My question is regarding – I know there are two types of NPIs, correct, like there's Type 1 for individual and Type 2 for organizational.

If there's a situation where there would be an NPI that – a specific NPI that you would use based on whether you're dealing with a commercial or Medicare as a payer if you have the individual provider tied to different organizational NPIs.

Vani Annadata: So – this is Vani. So a Type 1 NPI, an individual NPI – you can only ever obtain one per individual. So, that will be the same NPI you would use across Medicare, Medicaid, all other programs. But a Type 2 NPI – you are eligible to obtain more than one. And if you want to use one of those NPIs for Medicare program and another one for Medicaid – and that's a possibility.

Tracy Childress: That's a possibility?

Vani Annadata: Does that answer your question?

Tracy Childress: Yes, it does. I understood that an individual could be tied to – an individual only has one NPI that follows that individual. But, he or she could be tied to different organizational NPIs. But my question, and you answered, was would you use a different organizational NPI depending on, you know, what payor you're using. And I wasn't familiar with that as a concept. So, yes, you answered my question. Thank you.

Diane Maupai: Thank you, Vani.

Operator: Thank you. Your next question comes from the line of Shaki Nanianas.



Shaki Nanianas: Good afternoon. Thank you for taking my question. I am going back to the slide which said – which mentioned capture provider end point information. And the presenter mentioned about direct messaging.

Currently, direct messaging is an added feature through EMR. So what – am I right in understanding that we can use NPPES to transfer information between the providers just like the direct messaging, which would now take the additional task for the physicians from the EMR?

Carl Schell: So – this is Carl Schell again. No. NPPES is just an aggregator of those end points. So we just collect it. And then we will also present it within the next 6 months. We will add it to the NPPES registry so that other people would be aware of what your end points are. But we don't facilitate any sort of information transfer through the NPPES system. Did that answer your question?

Shaki Nanianas: Yes, sir. Thank you.

Carl Schell: Great. Thank you.

Operator: Your next question comes from the line of Ansley Weeks.

Ansley Weeks: Hello.

Diane Maupai: We hear you.

Ansley Weeks: Hello?

Carl Schell: Yes.

Diane Maupai: We hear you.

Ansley Weeks: Okay. I'm sorry for the delay. I'm just now getting used to logging in under my own login information for PECOS and I&A and NPPES. And I'm very curious about this CSV file or XML file for the bulk upload feature. I've never uploaded anything to NPPES before, so I'm wondering what kinds of things would I use that for?



I have logged in right now so I could see that you all were talking about. And I'm looking at the EFI access request, which I assume would be the first step in requesting that access for the employers that you have listed for yourself. But what then? And for what purpose?

Carl Schell: So – this is Carl again. The EFI CSV spreadsheet that you would upload would be the same sort of information that would be in an NPPES application for an NPI. So, if you wanted – if you had 10 people that you needed to get individual NPIs for, you would be able to fill out the template that's there with all the necessary information.

That way, when you uploaded it, it would take the place of creating from scratch 10 individual NPI applications in the interface online. It would actually shorten that so all you would be doing would be typing it into Excel, saving it as a CSV, and then uploading it for batch processing. Did that make sense?

Ansley Weeks: Okay. I think so. To be sure I understand, say I've got a new group and I've applied for an NPI for that group and I want to associate the group's providers to that group. Instead of just adding that location to each one of those providers, I could put their information on the template and upload that.

Carl Schell: Let us – let me talk about that internally here. Hold on one second.

Ansley Weeks: Okay.

Carl Schell: So I guess I am – we're a little confused here in the room as far as when you – when you're discussing linking providers. I believe – and Srini can answer if I'm incorrect – you can make edits to your NPI through EFI.

Srini Kunnam: Yes.

Carl Schell: But there is no linking or reassignments or anything similar to that in NPPES that you can do through the EFI process. Did that answer your question?

Ansley Weeks: I'm not sure. I think I'll have to play with it to see about this. But, luckily, I have a new group and can do that. So ...

Carl Schell: Sure. Yes. Absolutely.



Ansley Weeks: Thank you.

Carl Schell: Thank you.

Operator: As a reminder, to ask a question, press star followed by the number one on your touch-tone phone. To remove yourself from the queue, press the pound key.

Your next question comes from the line of Lyn Snow.

Lyn Snow: Hello. I work for a state. And 3 years ago, I revalidated two institutes' Medicare numbers and then – had no problem and gotten into everything – and now, I just revalidated our Medicaid numbers with the state and have come into a situation where none of our information matches. And I think before revalidation, it didn't really matter.

But now that the systems are talking to each other, many people, again, have gone in over the years for many reasons to sign up for things. So I can get into NCPDP. I get into PECOS. But I can't get into NPPES. And I've tried to call the help line, and they said that they don't see me. So, I guess I'm trying to make all the systems consistent with legal names and NPIs and addresses, and I don't really know where to begin.

Carl Schell: Okay. So, in this particular case, you might need some extended guidance from our enumerator or EUS help desk. So, what we would suggest is to give a call into the number on the last slide – last page of the slide.

Diane Maupai: Slide nine.

Carl Schell: Slide 9. And mention to them that you're calling from this call, from the National Provider Call. And what we'll do is we'll make sure that anyone from this call that's calling in there will get – sort of we'll have visibility into that here at CMS so we'll get to see how that path is going in case there really is an issue that we can help resolve. Does that help?

Lyn Snow: But I did call that line, and they said that the only way I could do it was to reapply for NPPES for every number the state has.

Srini Kunnam: Do you have an NPI right now?



Lyn Snow: Yes. I have – I have numerous NPIs.

Srini Kunnam: Okay. These are all Type 1s or Type 2s?

Lyn Snow: Organization.

Srini Kunnam: Organization. Okay. Are they all on the same EIN or different EINs?

Lyn Snow: Are they all under what?

Srini Kunnam: Different tax IDs or same tax ID?

Lyn Snow: No. They're the state of – it only has one EIN.

Srini Kunnam: Okay. Very good. Do you have an I&A account? Do you have a user ID and password to get into I&A?

Lyn Snow: I thought I did because I – wouldn't I have had to use that to revalidate the Medicare numbers?

Carl Schell: Yes. If you went into PECOS and did revalidation process, that means you have an I&A account as long as you logged into the web version of PECOS and did your revalidation.

Lyn Snow: I did and I can get into PECOS. I can't get into NPPES. And, then, I've gotten the same messages that information was not matching in NPPES.

Carl Schell: So just so that we can make sure we understand. You can log currently into PECOS. You can also log currently into I&A with no problem. But when you log in to NPPES, you get an error.

Lyn Snow: I can't log in to NPPES. And the errors that I'm getting from the other database is saying that the information doesn't match like – and it doesn't because somebody applied for NPIs for the whole state and they used one facility's address. So...

Carl Schell: Right. So, I guess, what I'm asking though, before we get to that point – because I understand you're trying to go into PECOS and update something in there and it's checking with NPPES and it's not matching.



Lyn Snow: Yes.

Carl Schell: So now you'd like to go into NPPES and update and edit that so it does match correctly.

Lyn Snow: Yes.

Carl Schell: But, you're unable to log in to NPPES when you go there and use your I&A account?

Lyn Snow: Yes.

Srini Kunnam: Can you please try logging into I&A directly? Do you know how to do that?

Lyn Snow: I've got files with instructions on each of the separate – I do have files for that.

Carl Schell: So, are you talking about multiple user names and passwords that you're trying to log in to NPPES with?

Lyn Snow: No. Just my own.

Carl Schell: All right. So, hold on. Let us talk about this for a second.

Lyn?

Lyn Snow: Yes.

Carl Schell: Would I be able to get a contact information directly for you? I don't know if you could give me your email. And I can email you and talk directly about – through this with you?

Lyn Snow: That'd be great.

Carl Schell: Go ahead.

Lyn Snow: It's.....

Carl Schell: Okay. Great. And I will make sure that I give you an email and we get this handled. Thank you.



Lyn Snow: Thank you so much.

Diane Maupai: Thanks, Carl.

Operator: Your next question comes from the line of Susan Stafford.

Susan Stafford: Hello. I just want to understand a little bit clearer. If I have my own user ID and password, go into NPPES, create a new NPI for an organization, I will have access to the NPI profile. But will I have access to the PECOS profile?

Srini Kunnam: Yes. You will have access to NPPES, but not PECOS. To get PECOS access, you have to go into I&A and follow the process there.

Susan Stafford: That's what I thought. Okay. Thank you very much.

Diane Maupai: Thank you, Srini.

Operator: Your next question comes from the line of Terry Allen.

Terry Allen: Hi. I just want to refer back to the answer given for Brandon's question about the Other Identifier field. There are some Medicare MAC – well, there is one Medicare MAC in particular, Noridian, that validates against NPPES when processing forms requesting access to the FISS DDE system.

And they very – they have very strict guidelines about meeting the PTANs to say very specifically, "This is a Medicare OSCAR" whatever and have the state code in there and have all this information. But you're saying you don't allow Medicare to be selected as an option. So, you know, how are the providers that process through that particular MAC supposed to handle this so they can get access to FISS DDE for their users, for their PTANs?

Carl Schell: So when you are saying that Noridian is asking for that information, are they asking for it for your Medicare applications or another application that you're working on through them?

Terry Allen: It's their internal application to request access for FISS DDE for any PTAN. They require their providers to go into NPPES and update the Other Identifier field saying very specifically "This is a Medicare



OSCAR or Medicare PIN” whatever and fill in those fields in the Other Identifier section with that information or they will reject the forms.

Carl Schell: Okay. So...

Terry Allen: And ...

Carl Schell: This is Carl again. What we’ll do is we will go talk to the person here who works with Noridian and see if we can get more information on that process because, I think, the one thing that we’ve – we have to worry about is having NPPES giving out any sort of personal information if someone puts something into that Medicare field. We don’t have any control over whether or not ...

Terry Allen: Yes.

Carl Schell: ... they’re putting out sensitive information. So, if – and I’m not – I’ve only heard this about Noridian before. So we’ll make sure we have that discussion with them to see if we can come up with the alternate solution.

Terry Allen: Yes. They’re the only ones that do have that requirement. And currently, we’ve kind of talked with them, and they are allowing the other dash non-Medicare option to be used. But, then, the providers have to, automatically, you know, type in whatever the information is.

Carl Schell: Yes.

Terry Allen: Another thing just so you know just so providers don’t get confused or anybody who’s trying to do this, in NPPES, when you go in to just, you know, search the NPI registry or do something like that, you put in your NPI, you click on it to get into the information, you go up to the Help option. And under Other Identifiers, it actually has six options that are available and it has Medicaid, Medicare NSC, Medicare OSCAR Certification, Medicare PIN, Medicare UPIN, and the Other. So if that’s not appropriate, perhaps you could update that information to where it only gives whatever the options are that are provided for an organization or whatever.

Carl Schell: Yes. This is Carl. We definitely do have that in our pipeline currently.

Terry Allen: Okay. Because it’s kind of confusing. So, just wondering. All right. Thank you so much.



Diane Maupai: Thank you, Carl.

Operator: To ask a question, press star followed by the number one on your touch-tone phone. To remove yourself from the queue, press the pound key. Your next question comes from the line of Anna Rose.

Anna Rose: Hello. Thank you for taking my call. My name is Anna Rose, and I work at Carolina Family Health Centers Incorporated in North Carolina. And we're an FQHC. We're getting ready to open a new site.

We haven't – I actually got our HRSA okay yet. So that's what we're waiting for. When I applied for my NPI for an organization, am I supposed to go under Manager Provider Information and do it there or on the main page?

Srini Kunnam: On the main – on the – okay. So, you – this is Srini Kunnam. What you do is you log in to NPPEs. On the main screen, you will have – you will see three buttons.

Anna Rose: Yes.

Srini Kunnam: You will see three buttons. One is – the first button is Apply for an NPI for Yourself. The second button is Apply for an NPI for Another Individual Provider, like a doctor. And then the third one is the one you want to pick, Apply for an NPI for an Organization.

Anna Rose: Okay. Thank you.

Srini Kunnam: You're welcome.

Diane Maupai: Thank you, Srini.

Operator: Your next question comes from the line of Lena McDougal.

Lena McDougal: Thank you. With the launch of this new portal, can we now delete NPI numbers online or do we still have to send in the paper application?

Srini Kunnam: Actually, I'm glad you asked. We are working to – it will be in the future – to deactivate. We don't delete.



Lina McDougal: Okay.

Srini Kunnam: We deactivate an NPI. So that's coming up very quickly. For now, you have to – if you need to do it right away, then you have to send in the paper forms. But it's in the pipeline in the near future.

Lena McDougal: Okay. Thank you.

Diane Maupai: Thank you, Srini.

Operator: Your next question comes from the line of Blessing Amushie.

Blessing Amushie: Good afternoon. I have a couple of questions because I'm a little bit confused. And the first question is, I need to get the website for the I&A. And the second one is, I'm assuming that all this applies to home health agencies as well.

Carl Schell: This is Carl. Can you please just repeat the first part of that? I couldn't hear it quite well.

Blessing Amushie: The first part is, Can I get the email or the link to I&A?

Srini Kunnam: Yes. Actually, I can give it to you right now. If you go to slide number 9 where it says the NPPES login page, you could click that.

And then, if you click on the right side, there is a Create or Manage my I&A account.

Blessing Amushie: So, that's under the...

Srini Kunnam: Slide 9, please. It's the first link on slide 9, NPPES login page.

Diane Maupai: It's the slide that's titled Resources.

Srini Kunnam: Yes. If you put it in presentation mode, you will be able to click it directly.

Blessing Amushie: Slide 9. Presentation mode.

Carl Schell: And what was your second question?



Blessing Amushie: The second question is, do we have to re-register with the NPPES as a home health agency?

Srini Kunnam: No. You see – do you have an –okay. With I&A – do you have an I&A account right now?

Blessing Amushie: Yes, we do.

Srini Kunnam: Okay. That's good. That ID should work. And in this case – does this health agency have an NPI already or not?

Blessing Amushie: Yes, we do.

Srini Kunnam: Okay. In that case, are you a staff end user, authorized official, or delegated official in I&A?

Blessing Amushie: Yes.

Srini Kunnam: Okay. As soon as you log in to NPPES by clicking the first link on slide 9, if you enter your user ID and password, right on the main page, you will see your health agency's NPA information.

Blessing Amushie: Okay. I'll do that then. Thank you.

Carl Schell: Great. Thank you.

Srini Kunnam: Thank you, Srini.

Operator: Your next question comes from the line of Bridget Carter.

Bridget Carter: Hi. This is Bridget. I'm calling from JD Matthews. I had a question about, if you – if I'm – if I log in through my I&A on the NPPES account, and I create an NPI for an organization and, then, I'm no longer responsible for updating that organization anymore, how does that organization then – if they have changes, how do they go in and update their information?

Carl Schell: So, I guess I'm trying to figure out – this is Carl again, sorry. How are you currently connected to that organization in I&A? Are you connected as an authorized official?



Bridget Carter: I'm actually not connected to that organization at all through I&A. I created my own I&A account and then I helped with setting up a practice – so, applying for their group NPI and getting them set up with insurance companies. And then, after they're set up, they leave me and I don't handle them anymore. So that even includes like updates.

Carl Schell: Okay.

Bridget Carter: How would they then go in and update?

Carl Schell: So, what I would suggest is that the company should have an authorized official that is connected to their EIN, whether that's – it's probably not going to be you. It's probably going to be an official or somebody that would be able to maintain that account at their company.

And then what you would do is from your company, you would connect from your account to their account as the surrogate. And once you have that surrogate – so, you would request surrogacy access.

The AO from that Tax ID number would be able to approve that surrogacy and, then, you would be able to do whatever you wanted to. And, then, in the future, you could remove that surrogacy or whatever, leaving them with an account that they could easily use any time with an AO that's at their location.

Srini Kunnam: Yes. Carl is correct. In this example, you want them to remove your surrogacy connection. That way, they can go where the new surrogates are. They can manage it themselves.

Carl Schell: Did that make sense?

Bridget Carter: Okay. So – yes. So should they – like if it's a brand-new practice, brand-new tax ID, they've never had a group NPI before, should they go ahead and set up the AO account and then make me a surrogate before I apply?

Carl Schell: Yes. Exactly. Yes. And, so, you can help them by going onsite and setting up their account with them. But one thing I want to make clear from CMS' perspective is that there should never be any sharing of user name and password information between different people.



That's definitely against CMS security policies. But you can definitely be a part of helping guide them through that process and then the connection through surrogacy should allow you to be able to log in and do anything you want there for them.

Srini Kunnam: And they don't have to have ...

Bridget Carter: Okay. And, then, they can just ...

Srini Kunnam: Yes. Go ahead. Sorry. Go ahead.

Bridget Carter: They could term my surrogacy when I'm done creating it. Correct?

Srini Kunnam: Yes. If they want to or they can keep. Yes. The answer to the question is yes. And, also, they can be an organization in I&A without having an NPI. That is allowed. So...

Bridget Carter: Okay. Thank you.

Srini Kunnam: You're welcome.

Operator: Your next question comes from the line of Cathy Purcell.

Cathy Purcell: Hi. I have a question in regard to being able to set up the main account for me to be able to manage all of the NPIs. I have multiple tax IDs and multiple NPIs that go with those. And so, I was wondering how I can set up one account where I can manage all of those together.

Srini Kunnam: That is very – go ahead Carl.

Carl Schell: Yes. So, typically, what we have you do is create one account for yourself.

Cathy Purcell: Yes.

Carl Schell: And, then, you would have to do one of two things.

Cathy Purcell: Yes.



Carl Schell: You – it really depends on how you want to manage this, right? If you wanted to set up yourself as an authorized official for every one of those tax ID numbers, you can. But then you have to give proof that you are able to be an AO, meaning send in a CP 575 and give that information to the help desk.

Or you could have each one of the people responsible for the TINs set up their AO accounts and then become surrogates for them. I guess – I just want to make sure – I'm not sure if I know your complete structure setup. But in the past, we have had people where they have one single person who is the authorized official for 150 TINs, but they have to go in and request that access.

Cathy Purcell: Okay.

Carl Schell: Now, we do have ways to help bulk approve those AO accounts if you're a large organization that has a lot of authorized official accounts that you need to have approved and you are unable to find all of the CP 575 information. Then we can – then please contact the help desk and they should be able to direct you to getting ahold of me at CMS.

Cathy Purcell: Excellent. Thank you so much.

Carl Schell: Yes. No problem. Thank you.

Additional Information

Operator: Thank you. I will now turn the call back over to Diane Maupai.

Diane Maupai: Thank you. Since we have no further questions, this concludes our call. As we referred to many times, slide 9 has a lot of good resources for you to learn more about the NPI system. There's also the email address for our help desk. For more information on evaluating today's call, please see slide 10.

My name is Diane Maupai. I'd like to thank our presenter, Sрни, and you for participating in today's Medicare Learning Network call. Have a great day, everyone.

Operator: Thank you for participating in today's conference call. You may now disconnect.