PECOS Medicare Enrollment Report Help
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PECOS Medicare Enrollment Report Help

Use of the data contained herein is subject to CGI Federal restrictions and applicable Federal Acquisition Data Rights Clauses
1 What’s New?

1.1 Section Headers
The Medicare Enrollment Report has an added Section Header to allow for easy identification of the topic content. These light blue Section headers provide a reference to the corresponding part of the 855x paper forms. Examples of the added Section Headers (see below) are: “FROM SECTION 2: IDENTIFYING INFORMATION” and “FROM SECTION 4: PRACTICE LOCATION INFORMATION”.

Exhibit 1 – Section Headers

1.2 Sub-Headers
Sections of the Medicare Enrollment Report display additional light blue sub-headers to logically group blocks of data. For example, as shown below, Liability Insurance Information is grouped by Policy Information, Agent Information, and Underwriter Information.

Exhibit 2 – Sub-Headers
1.3 Link to Medicare ID Report
For enrollments that have been approved at least once before, a View Medicare ID Report link displays on the Medicare Enrollment Report. This allows direct access to the Medicare ID Report.

Exhibit 3 – View Medicare ID Report link

1.4 Medicare Application Fee Payment Information
Information relating to the Medicare application’s fee and fee payment display for submitted applications. Prior to application submission, it displays ‘Upon submission’.

Exhibit 4 – Payment Information in Submitted Application

1.5 Application Signature(s)
Information regarding application signatures, including paper vs. electronic and the status of the signature, displays for applications between the time of submission and when the enrollment or change of enrollment is finalized/approved.

The APPLICATION SIGNATURE(S) section displays signatures associated with the application, including:

- Authorized Official/Delegated Official certification statement,
- Authorized Official/Individual reassignment authorization statement,
- Supervising Physician (for 855B IDTF only), and
- EFT Authorized Official signature information.
1.6 Medicare Enrollment Report Link Availability

1.6.1 Link to Medicare Enrollment Report from Topic View
A link to the Medicare Enrollment Report displays in the “Reports” section near the top of the “Topic View” page in the Provider Interface (PI). The Medicare Enrollment Report reflects all data entered by a Provider/Supplier prior to generating the report.
1.6.2 Link to Medicare Enrollment Report from Fast Track View

A link to the Medicare Enrollment Report displays in the “Reports” section near the top of the “Fast Track View” page in the Provider Interface (PI). The Medicare Enrollment Report reflects all data entered by a Provider/Supplier prior to generating the report.

Exhibit 7 – Medicare Enrollment Report Link – Fast Track View

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1.6.3 Link to Medicare Enrollment Report from Submission Page

A link to the Medicare Enrollment Report displays in the “Reports” section on the “Submission Page” that appears with the “Complete Submission” button at the bottom, prior to submitting the application. The Medicare Enrollment Report reflects all data entered by a Provider/Supplier to be submitted with the application when it is submitted.

Exhibit 8 – Medicare Enrollment Report Link - Submission Page

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1.6.4 **Link to Medicare Enrollment Report from Submission Confirmation Page**

A link to the Medicare Enrollment Report displays in the “Reports” section on the “Submission Confirmation Page” after successful submission of the application. The Medicare Enrollment Report reflects all data entered on the application submitted to the Medicare Administrative Contractor (MAC), including the application signature(s) and Medicare Application Fee.

![Exhibit 9 – Medicare Enrollment Report Link - Submission Confirmation Page]

**IMPORTANT NOTE**: Please save a copy of your submitted application to help facilitate discussion with your Medicare Administrative Contractor after approval.

1.7 **Report Structure**

The Medicare Enrollment Report displays topics according to a set structure for each type of 855 form. Sections or sub-sections that do not apply to a given application scenario or form type (855 A, B, I, O, R or S) do not appear in the report. Data fields display in the report only when the fields apply to the scenario and form type being submitted.

2 **Identifying Changed Data, No Data Provided, Large Records**

2.1 **Identifying Added, Edited, or Deleted Data**

When a Change of Information (COI) application or Revalidation application is submitted, data that changed (i.e., added, edited, or deleted) is flagged accordingly.

A tag displays that identifies data as “Added”, “Edited” or “Deleted”. For further identification, a dark border displays around each edited, added or deleted section of data. For added visual impact, added records display highlighted in light green and deleted records display highlighted in light red in both the header and data background areas.
2.2 Change Information Roll-Up

When data has been changed (added, edited, or deleted), the headers above the identified change are annotated as “Updated”. The section header displays as “Updated” to flag the section as having modified data, allowing quick identification of updates.

Note: When the application is an initial application, data is not marked as “Added” or “Updated” because the filing is all new data, with the exception of previously accepted ownership in an initial 855S application.
2.3 No Data Provided

When there is no data entered for a section that applies to a form and scenario, the section header and sub-section header identify that there is “No Data Provided”. The message “You have indicated that the applicant does not have any information for this topic.” no longer appears.

**NOTE:** When data can be entered for a form, but no data has been entered or selected for a field, the report displays the label for the field and no value appears for the field. That means a blank field value in a section where some data was entered in the section indicates that a user has not provided data for the field.
2.4 Records in Sections with Large Number of Records

In sections that can have large volumes of data (greater than 50 records), the individual records are identified at the beginning of each set of data by a header with a purple background and a different font.

Exhibit 13 – Record Identification

<table>
<thead>
<tr>
<th>Name</th>
<th>Date of Birth</th>
<th>State of Birth</th>
<th>Country of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>DFASDF, DFASDF</td>
<td>11/11/XXXX</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax ID Number(TIN)</td>
<td>NPI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>XXX-XXX-XXXX (SSN)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ownership/Managing Control Information

<table>
<thead>
<tr>
<th>Role</th>
<th>Effective Date</th>
<th>Exact Percentage</th>
<th>Title</th>
<th>Types of services furnished</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTHORIZED OFFICIAL</td>
<td>07/28/2014</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5% OR GREATER DIRECT</td>
<td>12/12/1999</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OWNERSHIP INTEREST</td>
<td>12/12/1999</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>W-2 MANAGING EMPLOYEE</td>
<td>12/12/1999</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OPERATIONAL/MANAGERI</td>
<td>12/12/1999</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AL CONTROL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Indicate if individual is Authorized or Delegated official: AUTHORIZED OFFICIAL

Telephone Number (455) 434-4333

Is the delegated official a W2 employee? No

Final Adverse Legal Actions: No Data Provided

3 Displaying Large Numbers of Records

3.1 “Show All” Buttons

Seven sections of the Medicare Enrollment Report are known to sometimes contain more than 50 individual records. The data that initially displays in the Medicare Enrollment Report is limited to 50 records. When there are more than 50 records for an enrollment, a “Show All <Data Type>” button displays directly under the section to enable display of the remaining data, as is shown in the “Show All IDTF Technicians” example below.

The seven sections are:

- Application Signatures
- IDTF Technician (applicable to 855B, Attachment 2)
- Ownership and/or Managing Control Info (Individuals)
- Ownership and/or Managing Control Info (Organizations)
- Physicians Assistants
- Practice Locations
- Reassignments
The “Show All <Data Type>” button for a section displays as active until used. When the “Show All <Data Type>” button is selected, the application retrieves, formats and displays the results in a single web page, which takes time. The button is disabled once selected.

Exhibit 14 – “Show All” Button Example for “Show All IDTF Technicians”

Exercise caution when selecting a “Show All <Data Type>” button because it may cause a lengthy delay while loading data to your screen. The message “Please wait. Data is loading and will display when complete.” appears while the data is being retrieved. When the data is available on your screen, the message no longer appears on the page.

Warning: Selecting another browser function while the message that data is loading is shown on screen may cause the browser to stop responding. The browser may stop responding if the amount of memory required to display the data exceeds the memory available to your browser.

Note: The “Generate CSV Report” button for Practice Locations and Reassignments no longer appears on the report.

The report with all data can be printed. To include all records, the “Show All <Data Type>” button for each section with a large volume of data must be selected prior to printing the report.

3.2 Sorting of Data

To reduce the need to show all records, the data is sorted in seven sections with the potential for a large volume of data. The data displayed in applications with changed data first shows the changed data as a sorted block, followed by the unchanged data as a sorted block of data. When combined with the limitation to display the first 50 entries, this enables the review of the most relevant data first.

When there is no changed data, such as with an initial application, the changed or unchanged part of the sort order does not apply.

The sort order for each of the seven sections is described below.
3.2.1 Application Signature(s) Sort Order
  - Signature Status, by group
    - Last Name
    - First Name

Signatures requiring further action appear before signatures that do not require further action.

Statuses requiring further action include: Pending, Paper Signatures Expected, E-Signatures and Pending.

Statuses that do not require further action include: Complete, Manual Override, Decline, N/A, and All Signatures Complete.

3.2.2 IDTF Technician Sort Order
  - Changed followed by Unchanged
    - Last Name
    - First Name

3.2.3 Ownership and/or Managing Control Info (Individuals) Sort Order
  - Changed followed by Unchanged
    - Last Name
    - First Name

3.2.4 Ownership and/or Managing Control Info (Organizations) Sort Order
  - Changed followed by Unchanged
    - Legal Business Name
    - Name (Last, First, Middle) when person is acting as an organization

3.2.5 Physicians Assistants Sort Order
  - Changed followed by Unchanged
    - Last Name
    - First Name

3.2.6 Practice Locations Sort Order
  - Changed followed by Unchanged
    - Practice Location Name

3.2.7 Reassignments Sort Order
  - Changed followed Unchanged
    - Last Name
    - First Name
    - Legal Business Name
4 Printing the Report

The report prints all data for each section of the report. For sections that have the “Show All <Data Type>” button, the button has to be selected prior to printing to have all records from the section display in the printed report.

To facilitate finding changed data on the printout, there are thick lines around the updated (i.e., added, edited, or deleted) data. The flags for changed data (“Updated”, “Added”, “Deleted”, and “Edited”) are aligned on the right-hand edge of the printout on the section and sub-section headers to facilitate scanning the report to locate sections and data that changed.

Printing is done via browser print capability (for example, by using Right-click>Print Preview>Print, in Internet Explorer).

The printed report has a plain white background with black and red text, as shown below.

Exhibit 15 – Example of Printed Medicare Enrollment Report

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NEW MEDICARE APPLICATION

Application Summary

Tracking ID: T123020140000002
Enrollment Status: NEW

Medicare Application Fee Required? Upon Submission
Medicare Application Fee Paid? Upon Submission

FROM SECTION 2: IDENTIFYING INFORMATION

PERSONAL INFORMATION
Date of Birth: [Date]
Gender: [Gender]
Type of Other Name (Specify): [Other Name]
Medicare School or Other Professional School: [School]

APPLICATION SIGNATURE(S)
Signature Status: [Signature Status]

FROM SECTION 1: IDENTIFYING INFORMATION

PRACTITIONER SPECIALTY
Practitioner Type: PHYSICIAN
Primary Practioner Specialty: INTERNAL MEDICINE

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