I&A System Quick Reference Guide

I&A Features

The recent updates have streamlined access when it comes to managing your information in NPPES, PECOS, and HITECH. **If you accessed any of these systems prior to October 7th 2013, your existing account will still work just as it did previously, and has been updated to take advantage of the new features.**

Create an Account

Depending on the type of user you are, and how you have setup your account, I&A will allow you to access various CMS computer systems such as NPPES, PECOS, and HITECH and perform actions such as creating an NPI or updating Medicare Enrollment information.

Retrieve and Reset Forgotten Usernames and Passwords

All Users will have the ability to retrieve forgotten user IDs and reset forgotten passwords through the online tools, rather than contacting CMS External Users Services (EUS).

Register to access CMS Systems on behalf of your Organization

Authorized and Delegated Officials will be able to add their Organization as an employer in I&A, in order to access PECOS or HITECH on behalf of their Organization, or so their 3rd Party Organization can work on behalf of Providers.

Add and Manage Staff within your Organization

I&A allows Authorized and Delegated Officials to add and remove Staff from their Organization, and control the functions accessible to those staff.

Work in CMS Systems on behalf of Individual or Organizational Providers

I&A allows its users to quickly and securely manage connections between Individual Providers or Organizational Providers, and their relationships with Surrogates who work on their behalf.

IMPORTANT NOTE:
Registering or updating information in the I&A system does not automatically enroll you in Medicare, register you for an NPI, or perform any other actions or updates in the PECOS, NPPES, or HITECH systems.

If you created your account prior to October 7th 2013, and the information shown under your profile information, employers, or connections is not accurate please see the Frequently Asked Questions (FAQ) for more information on how to update your information.

What Type of User are You?

Review the terms. Which term best defines you and your organization? Depending on your situation it may change.

Individual Provider/Supplier

- An individual that provides services to Medicare beneficiaries and submits claims to Medicare and/or reassigns benefits to an **Organizational Provider** (such as a group practice or hospital) that submits claims to Medicare on their behalf (e.g., Provider working for a Group Practice, or Solo Provider).
- Must have or be eligible for a Type 1 NPI in NPPES.

Organizational Provider

- An Organization that provides medical items and/or services to Medicare beneficiaries (e.g., DMEPOS Supplier, Physician Group Practice, Hospital, etc…) that submits claims to the Medicare Part A and/or Part B programs
- Must have or be eligible for a Type 2 NPI in NPPES.

3rd Party Organization

- A third-party organization (e.g., billing agency, credentialing consultant, or other staffing company) that has business relationships with **Individual Providers** or **Organizational Providers** to work on their behalf.

Authorized Official (AO)

- An appointed official of an **Organizational Provider** or **3rd Party Organization** with the authority to legally bind that organization and conduct business on behalf of the organization. If an **Organizational Provider**, also ensure the organization's compliance with Medicare statutes, regulations and instructions.
- Able to initiate or accept connections, and manage staff on behalf of his or her organization.

Delegated Official (DO)

- An individual, delegated by the Authorized Official of an **Organizational Provider** or **3rd Party Organization**, with the authority to legally bind the organization and conduct business on behalf of the organization. If an **Organizational Provider**, also ensure the organization's compliance with Medicare statutes, regulations and instructions.
- Able to initiate or accept connections, and manage staff on behalf of his or her organization.

Staff

- An individual (e.g., Credentialing Specialist, Office Manager, etc…) who has been approved by an Authorized or Delegated Official of an **Organizational Provider** or **3rd Party Organization,** or who has been approved by an **Individual Provider**, as an employee of that Organization, or is employed by that Provider.

Surrogate

- An employee of an **Individual Provider** or **Organizational Provider** that is authorized to access, view, and modify information within a CMS computer systems on behalf of their employer (e.g., Staff); **OR**
- An **Organizational Provider** that has a business relationship with an **Individual Provider** to access, view, and modify information within CMS computer systems on their behalf; **OR**
- A **Third-Party Organization** that has a business relationship with an **Individual Provider** or **Organizational Provider** to access, view, and modify information within CMS computer systems on their behalf.

What You Can Do?

Role	**Represent an Organization**	**Manage Staff**	**Approve/Manage Connections**	**Act on behalf of Individual or Organizational Providers**
Individual Provider	Yes	Yes	Yes	Yes
Authorized Official	Yes	Yes	Yes	Yes
Delegated Official	Yes	Yes	Yes	Yes
Staff	No	No	No	Yes
Surrogate	No	No	No	Yes

Examples – Setting Up Your Account

Retrieve and Reset Forgotten Usernames and Passwords

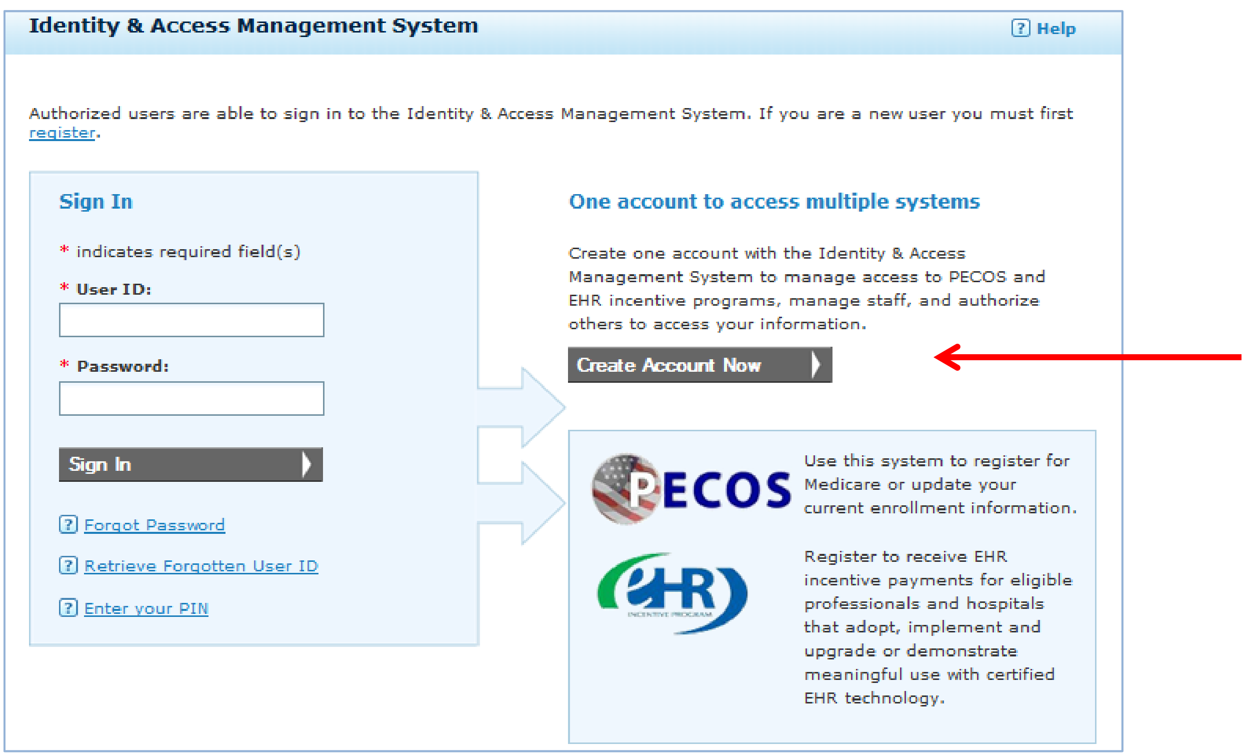
- **Reset Forgotten Password**

    - On the I&A Homepage select the **Forgot Password** hyperlink.
    - On the Reset Forgotten Password – User ID page, enter your User ID and click the **Continue** button.
    - On the Retrieve Forgotten Password – Challenge Questions page, answer the three security questions, previously established, and click the **Submit** button.
    - On the Reset Password page enter your new password and click the **Reset** button.
    - On the Reset Forgotten Password – Confirmation page, you will see that your password has been reset. Click the **Continue to Login Page** button to continue. You will also receive a confirmation e-mail informing you that your password has been changed.

- <u>**Retrieve Forgotten User ID**</u>
  - On the <u>I&A Homepage</u> select the **Retrieve Forgotten User ID** hyperlink.
  - On the <u>Retrieve Forgotten User ID – Information</u> page, you can chose to enter your *E-mail Information* OR your *User Information* and then click the **Continue** button.
  - When you choose to enter your *E-mail Information*, on the <u>Retrieve Forgotten User ID – Confirmation</u>, you will see that your user ID has been sent to the e-mail address provided. Click the **Continue to Login Page** button to continue.
  - When you choose to enter your *User Information*, on the <u>Retrieve Forgotten User ID – Challenge Questions</u> page, you will be prompted to answer security questions, previously established, and click the **Submit** button.
  - On the <u>Retrieve Forgotten User ID – Confirmtaion</u> page, you will see the user ID associated with your user inforation. Click the **Continue to Change Password** button to continue.
  - On the <u>Reset Password</u> page, enter your new password and click the **Reset** button.
  - On the <u>Reset Forgotten Password – Confirmation</u> page, you will see that your password has been reset. Click the **Continue to Login Page** button to continue. You will also receive a confirmation e-mail informing you that your password has been changed.

Register as an Authorized Offical/Delegated Official

- To register/create an Authorized Official/Delegated Official account in the Identity & Access Management System, select the **Create Account Now** button from the I&A homepage.



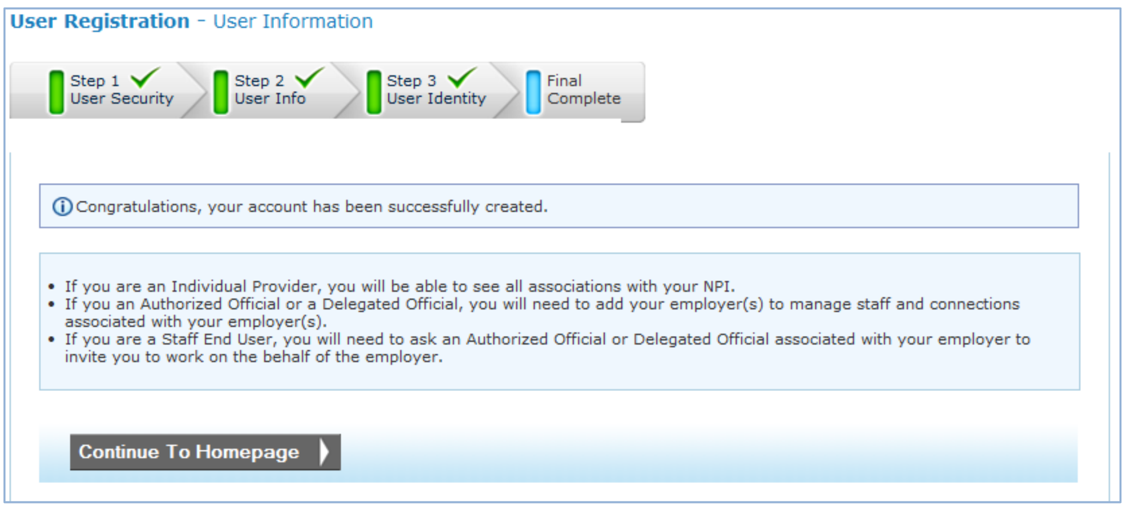
- On the User Registration page, enter your e-mail address, security image, and click the **Submit** button.

- On the Received PIN page, enter the PIN sent to your e-mail address and click the **Submit** button. Note: The e-mail will come from EUS Support and subject line of the e-mail will read E-mail Validation.

- On the User Registration – Step 1 User Security page, enter a user ID and password, then select and answer five security questions, and click the **Continue** button.

- On the User Registration – Step 2 User Information page, complete all of the required fields. When answering the *Do you want to confirm your identity now?* Questions, select **I will confirm my identity later**. Click the **I Agree** button to continue.

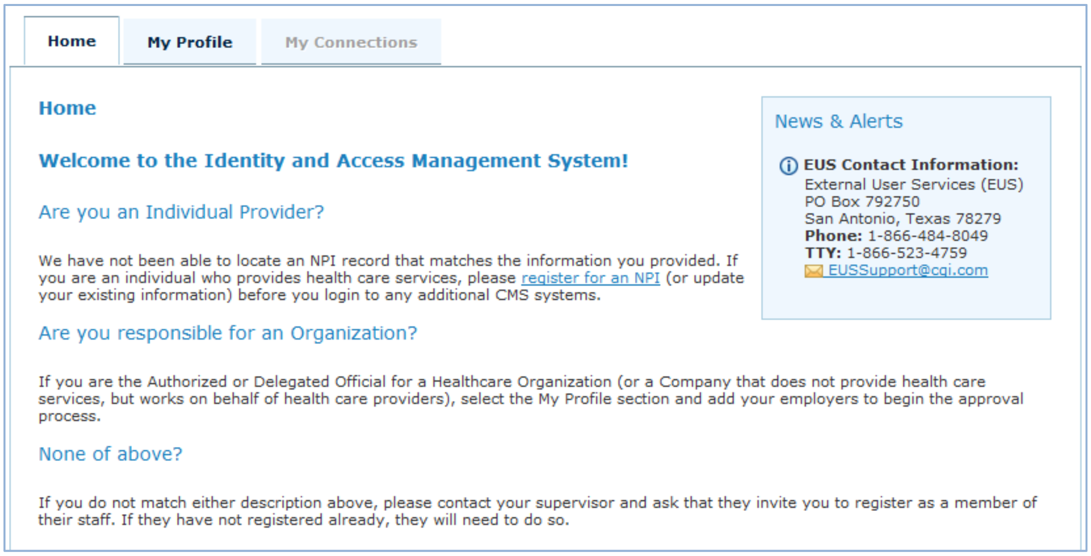
- Since you selected to confirm your identity later, Step 3 – User Identify will be marked complete and you will receive the successful account creation page. Click the **Continue To Homepage** button to continue.



- Your account has been setup in I&A.
- **IMPORTANT NEXT STEP:** In order to identify yourself as the Authorized Official/Delegated Official, you will need to setup your Organization as an empolyer.

How to Setup Your Organization

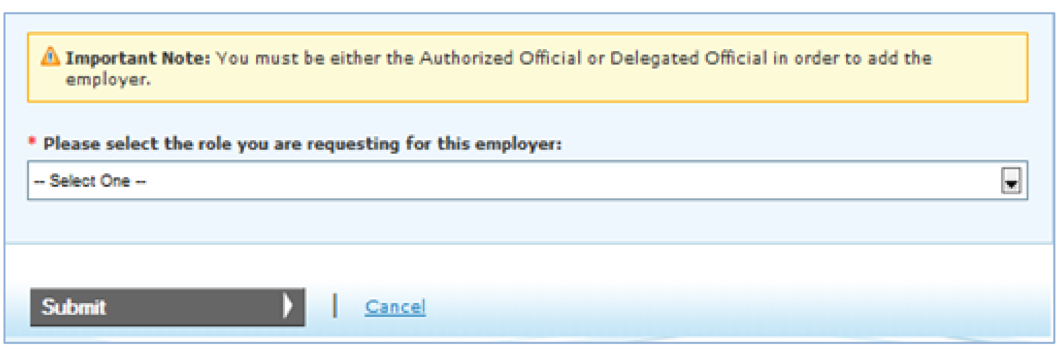
- Log in to your I&A account.
- On the Home tab you will read *if you are responsible for an Organization select the My Profile tab and add your employers to begin the approval process*.



- On the <u>My Profile Tab</u>, scroll to the bottom of the page – under Employer Information – and select the **Add an Employer** button.

- On the <u>My Profile – Add Employer Search</u> page, enter criteria to search for your employer and click the **Search** button. (NPI Search is recommended for Organizational Providers with an existing NPI.)

- If your Employer is returned in the search, select the Employer from the list and continue.
  - NOTE: If your Employer is not found in the Search, click the **Add Employer Not in List** button. Enter all of the required fields, select the e-mail address that you wish to use for the Employer.
  - Select the role you are requesting for this employer (Authorized Official/Delegated Official), and click the **Submit** button. **IF YOU ARE STAFF, THEN THE AUTHORIZED OR DELEGATED OFFICAL FOR YOUR ORGANIZTION MUST REGSITER AND SEND YOU AN INVITATION TO CREATE AN ACCOUNT.**



- On the My Profile – Add Employer – Confirmation and Review page, review the actions you will need to take in order to be approved as the Authorized Official/Delegated Official and click the **Done** button. The Authorized Official/Delegated Official will receive a New Employer e-mail confirmation.
  - If you are already listed as the Authorized or Delegate Official for an Organizational Provider, which is currently enrolled in Medicare then your application should be approved immediately.
  - If your Organization is not currently enrolled, not eligible to enroll, or you are not already listed as an AO or DO for an enrolled Medicare Provider you will be required to submit verification information to CMS External Users Services for review before you can be approved.

- You can track your Authorized Official/Delegated Official request status at the bottom of your My Profile tab.

- **Important Note:** Once your Authorized Official/Delegated Official request is approved, please wait 2 – 3 hours for your account to synchronize before attempting to access the PECOS/HITECH system.

How to Initiate a Connection (Surrogate) Request to an Individual Provider

1. As an Authorized/Delegated Official, log in to your I&A account
2. On the My Connections Tab under the Group/entity requesting to work on behalf of the provider select the **Find Provider** button
3. On the Add Provider screen, enter either the:
   a. Organization Name (with City/State or ZIP)
   b. OR Last Name (for Individual Provider)
   c. OR NPI (for Individual Provider or Organization)

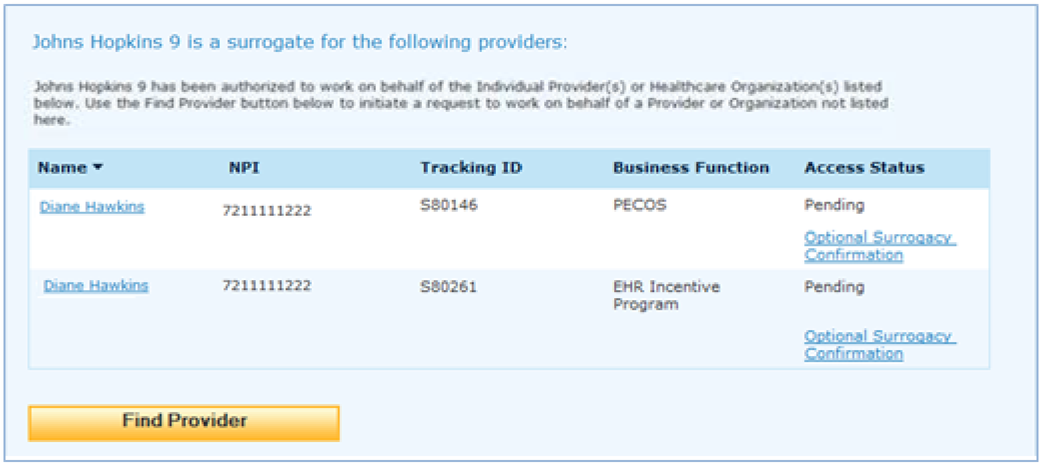
   Then click the **Search** button
4. Under the section "Search Results", select radio button next to the provider's name. This expands the screen so that you can select the business functions you would like to access on behalf of the provider.
5. Select the checkbox next to PECOS/EHR/NPPES (Future) and click the **Continue** button
6. On the Add Provider confirmation page, review the information on the page for accuracy and click the **Submit** button to move forward with the request.

Note: Once you click the Submit button an e-mail will be sent to the provider notifying him/her of your surrogate request. Please also note that you have not completed the connection request steps until you click the **Done** button at the bottom of the Add Provider > Review screen.

7. On the Add Provider > Review page you will see a summary of your connection request.

Note**:** Your connection request is complete once you click the **Done** button.

8. After you click the **Done** button you will see the provider added to the list of providers you are a surrogate for with an Access Status of "Pending".

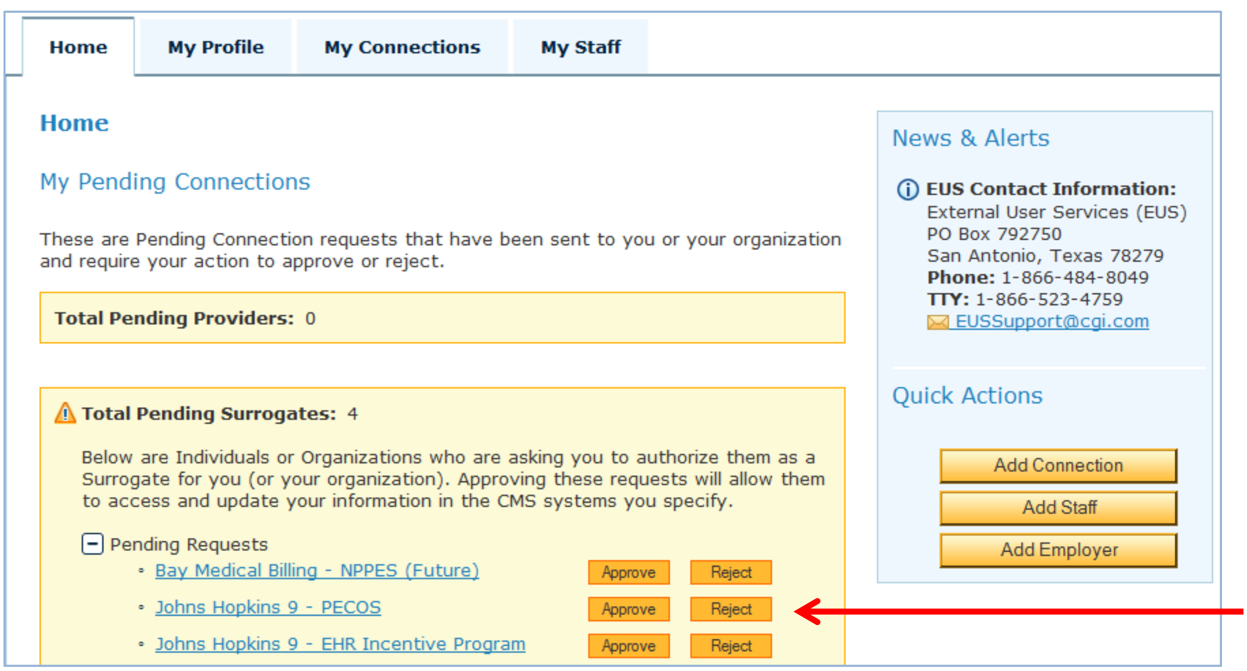


How Individual Providers Approve/Reject a Connection (Surrogate) Request

After the provider receives the connection (surrogate) request e-mail, the provider can take the following steps to approve/reject the request. The following steps apply to an Individual Provider who has previously signed in to I&A <u>and</u> has completed their User Information Integrity Check.

1. Log in to I&A
2. The provider will see the **Approve** button available on their *Home* tab.

Note: There are separate approve buttons to Approve/Reject PECOS and EHR requests.



Examples – Common Connection/Surrogate Scenarios

Example #1: Individual Provider approves Group Practice to manage their PECOS information

John Smith (Individual Provider) is part of a group practice Health Group Inc. (Organizational Provider). Brian Johnson is the Authorized Official for Health Group Inc. Tom and Alex (Staff) are both credentialing specialists that work for Health Group Inc. John has made business arrangements with Health Group Inc. to manage his enrollment information within PECOS and update information in EHR.

Assumption: Health Group Inc. is already found in I&A and already has an NPI. Brian, Tom, and Alex are already established with their respective roles in I&A. John already has an NPI.

Brian Johnson (AO for Health Group Inc.):

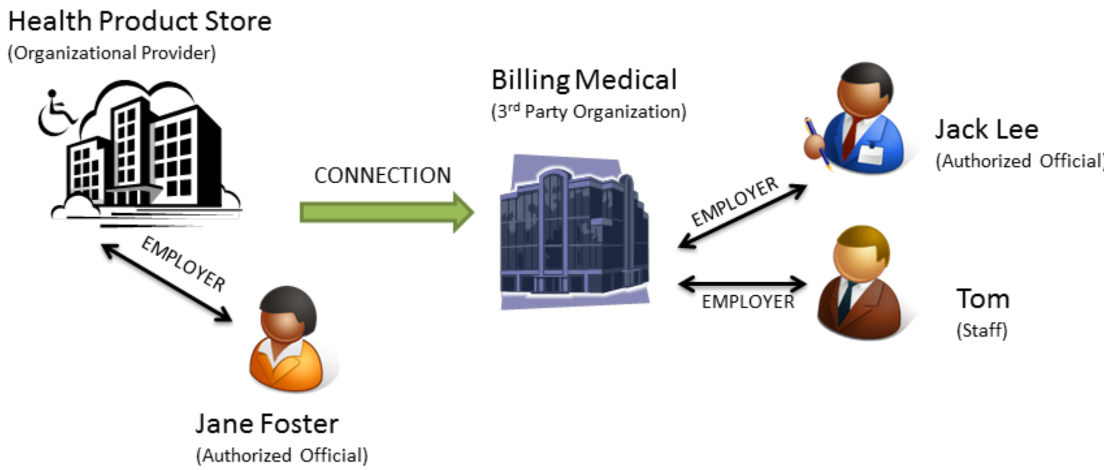
1. Logs in to I&A;
2. Goes to My Connections, and clicks Find Provider, under Health Group Inc.;
3. Searches for John Smith by his NPI;
4. Selects him and then the PECOS, and EHR business functions; and
5. Confirms the connection request.

John Smith (Individual Provider):

6. John Smith receives notification of the requested connection.
7. Logs in to I&A;
8. Sees the pending request from the group to add him on both the Home page and in the list of connections on the My Connections page;
9. John approves the request;
10. John receives notification of approved connection request;
11. Health Group Inc. receives notification of approved connection request.

These steps establish the connection (surrogacy relationship) between John Smith and Health Group Inc. – which allows any member of Health Group Inc.'s staff (i.e., Brian, Tom, or Alex) to access information for John Smith. If Health Group Inc. had established a Delegated Official they could also initiate the connection request.

Example #2: Organizational Provider hires 3rd Party Consulting Company to manage PECOS information.



Health Product Store (Organizational Provider) has made business arrangements with a 3rd party consulting company, Billing Medical (3rd Party Organization) to manage their enrollment information in PECOS. Jane Foster is the Authorized Official of Health Product Store, Jack Lee is the Authorized Official of Billing Medical, and Tom (Staff) is a credentialing specialist that works for Billing Medical.

Assumption: Health Product Store already has an NPI, Billing Medical is already established in I&A, and Jane, Jack, and John are setup with their respective roles.

Jack Lee (Authorized Official of Billing Medical):

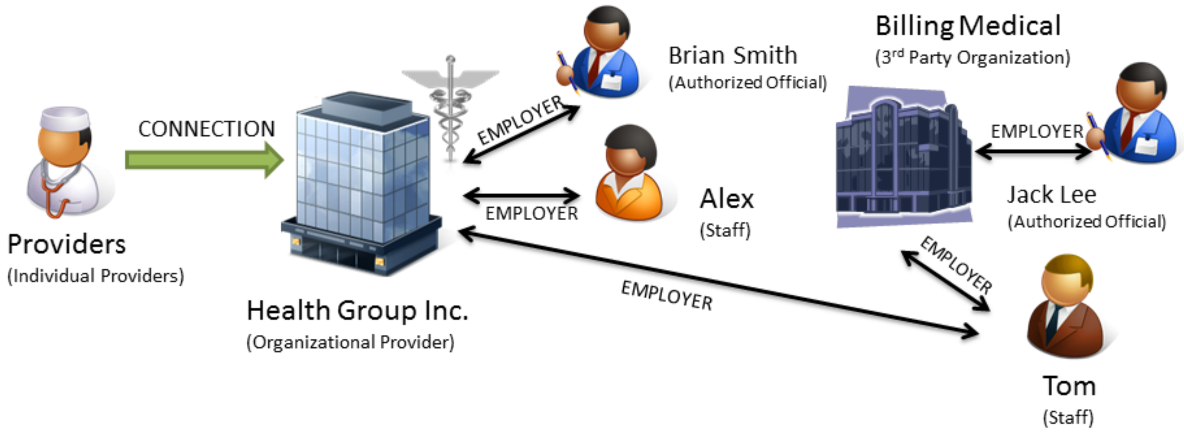
1. Logs in to I&A;
2. Goes to My Connections, and clicks Find Provider, under Billing Medical.;
3. Searches for Health Product Store by its NPI;
4. Selects Health Product Store and then the PECOS business function; and
5. Confirms the connection request.

Jane Foster (Authorized Official of Health Product Store):

6. Health Product Store Authorized Official receives notification of the requested connection.
7. Logs in to I&A;
8. Sees the pending request on both the Home page and in the list of connections on the My Connections page;
9. Jane approves the request;
10. Jane receives notification of approved connection request;
11. Billing Medical receives notification of approved connection request.

These steps establish the connection (surrogacy relationship) between Health Product Store and Billing Medical – which allows any member of Billing Medical's Staff to access information for Health Product Store. If Billing Medical had established a Delegated Official they could also initiate the connection request.

Example #3: Group Practice hires 3rd Party Consulting Company to manage PECOS and EHR information for itself, AND all the Individual Providers who have already connected to it.



Health Group Inc. (Organizational Provider) has made business arrangements with a 3rd party consulting company, Billing Medical (3rd Party Organization) to manage their enrollment information in PECOS, and the enrollment information for all their Individual Providers who have previously connected to Health Group Inc. Brian Smith is the Authorized Official for Health Group and Alex (Staff) is the office manager. Jack Lee is the Authorized Official for Billing Medical, and Tom (Staff) is already a member of the Staff on Billing Medical, and will be the only person working on information for Health Group or any of its Providers.

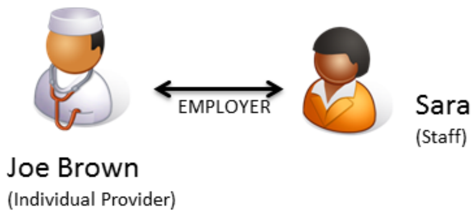
Assumption: Health Group Inc. *already has an NPI, Billing Medical is already established in I&A, and both Brian and Tom are setup with their respective role, Individual Providers have established connections with Health Group Inc.*

Brian (Authorized Official):
1. Logs in to I&A;
2. Goes to My Staff, and clicks Add Staff;
3. Enters Tom's name and e-mail address;
4. Submits the request.

Tom (Staff of 3rd Party Organization):
5. Receives an e-mail requesting that he register as a staff for Health Group Inc.;
6. Selects the link from the e-mail;
7. Enters his e-mail address and the PIN provided in the e-mail;
8. Since Tom is already a registered user in I&A he log's in and finalizes the registration.
9. Upon successful registration Tom will now see he is a Staff member for Health Group Inc.

These steps establish the connection (surrogacy relationship) between Health Group Inc. and Billing Medical via Tom, a member of Billing Medical's staff. Tom from Billing Medical can now access information for Health Group Inc., AND all of the Individual Providers who have previously approved connections between themselves and Health Group Inc.
IMPORTANT NOTE: If Health Group Inc. creates a CONNECTION to Billing Medical rather than making an individual of Billing Medical's Staff a member of their staff, Billing Medical's Staff would only have access to the PECOS information for Health Group Inc., NOT any of the Individual Providers who previously authorized Health Group Inc. to work on their behalf.

Example #4: Individual Provider adds Office Manager to Update PECOS records.



Joe Brown (Individual Provider) has a private practice JB Medical Clinic. Sarah Douglas is Joe Brown's office manager and will be managing his enrollment information within PECOS and update information in EHR.

Assumption: Joe Brown already *has an NPI and is already established in I&A.*

Joe Brown (Individual Provider):

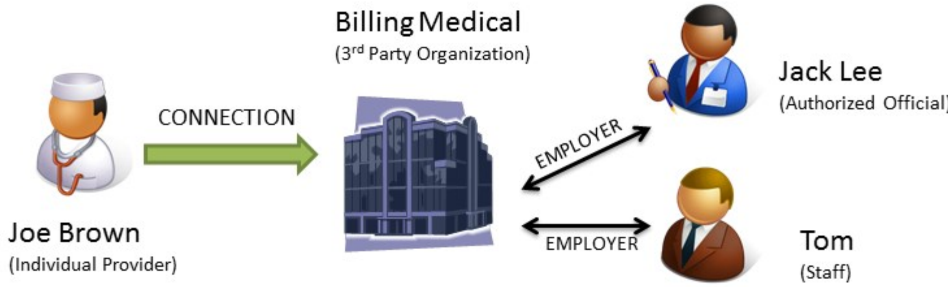
1. Logs in to I&A;
2. Goes to My Staff, and clicks Add Staff;
3. Enters Sarah's name and e-mail address;
4. Selects Sarah's employer (Joe) and Role – Staff End User and then the PECOS/EHR business function; and
5. Submits the request.

Sarah Douglas (Staff - Office Manager):

6. Sarah receives an e-mail requesting that she register as a staff end user for Joe;
7. Sarah selects the link from the e-mail;
8. Enters her e-mail address and PIN provided in the e-mail;
9. Since Sarah is not currently a registered user in I&A she will select Continue to Registration;
10. Sarah follows the screens through the Registration process.
11. Once registration is successful Sarah will see on her My Profile tab that she now a Staff End User for Joe Brown

These steps establish the employment relationship between Joe Brown and Sarah Douglas. Sarah Douglas. As a member of Joe Brown's Staff she can now act as a surrogate for Joe Brown.

Example #5: Individual Provider Hires 3rd Party Organization to Update PECOS records.



Joe Brown (Individual Provider) has a private practice JB Medical Clinic, and has made a business arrangements with a 3rd party consulting company, Billing Medical (3rd Party Organization) to manage his enrollment information in PECOS and EHR. Jack Lee is the Authorized Official of Billing Medical.

Assumption: Billing Medical is already established in I&A, and Jack is already setup as the AO. Joe Brown already *has an NPI and is already established in I&A.*

Jack Lee (AO for Billing Medical):

1. Logs in to I&A;
2. Goes to My Connections, and clicks Find Provider, under Billing Medical.;
3. Searches for Joe Brown by his NPI;
4. Selects him and then the PECOS, and EHR business functions; and
5. Confirms the connection request.

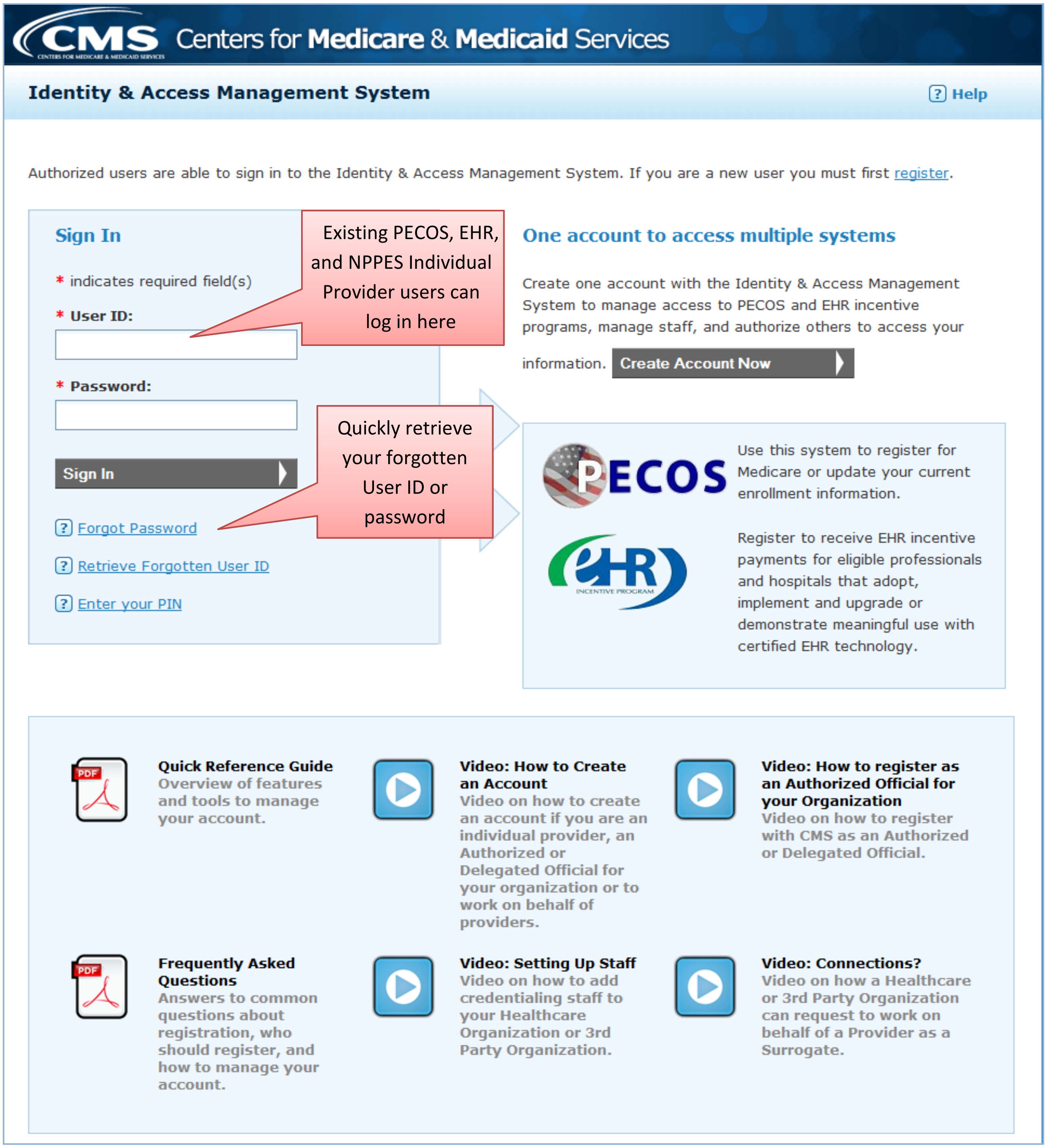
Joe Brown (Individual Provider):

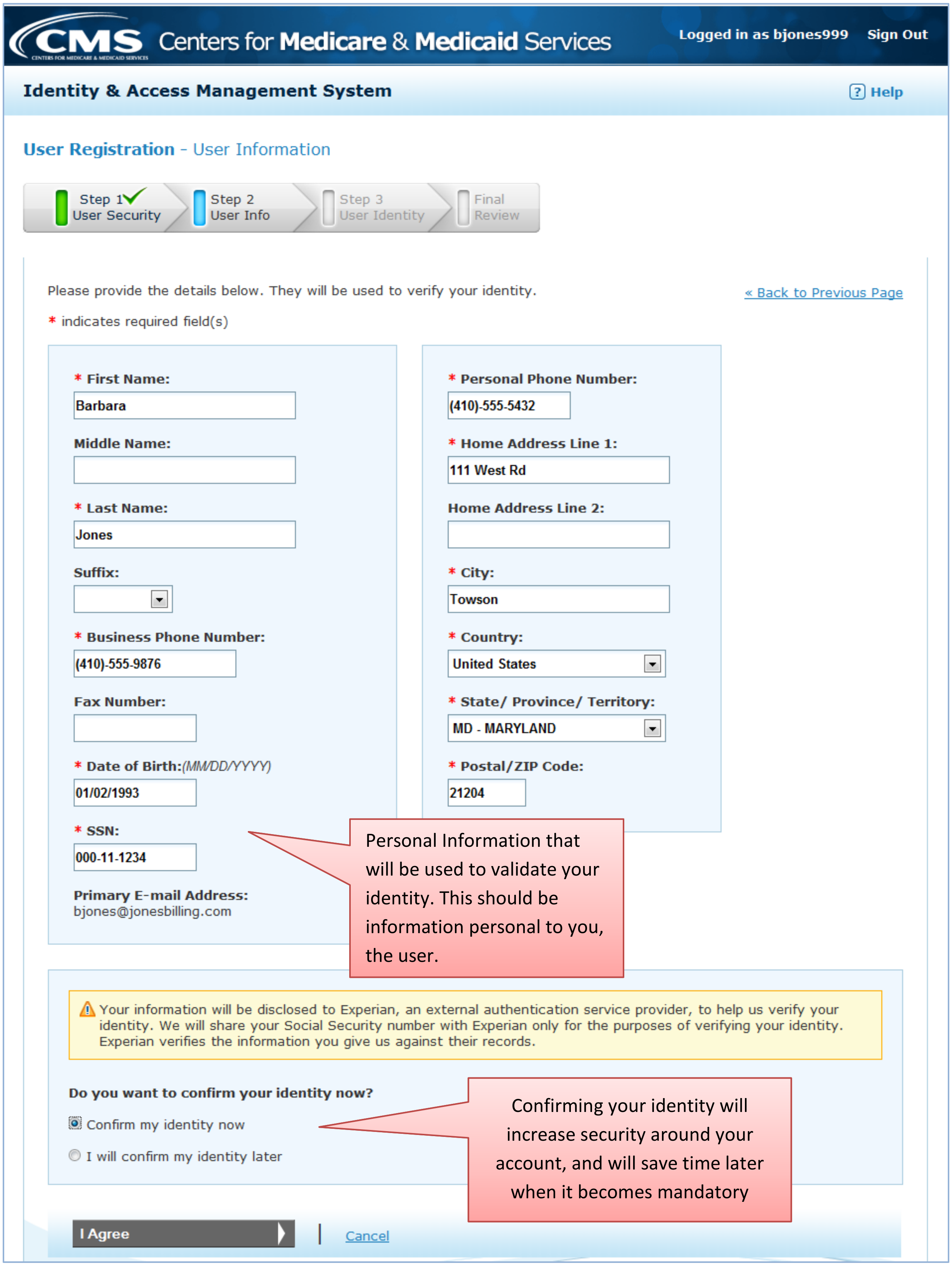
6. Joe Brown receives notification of the requested connection.
7. Logs in to I&A;
8. Sees the pending request on both the Home page and in the list of connections on the My Connections page;
9. John approves the request;
10. Billing Medical receives notification of approved connection request

These steps establish the connection (surrogacy relationship) between Joe Brown and Billing Medical – which allows any member of Billing Medical's staff to access information for Joe Brown. If Billing Medical had established a Delegated Official they could also initiate the connection request.

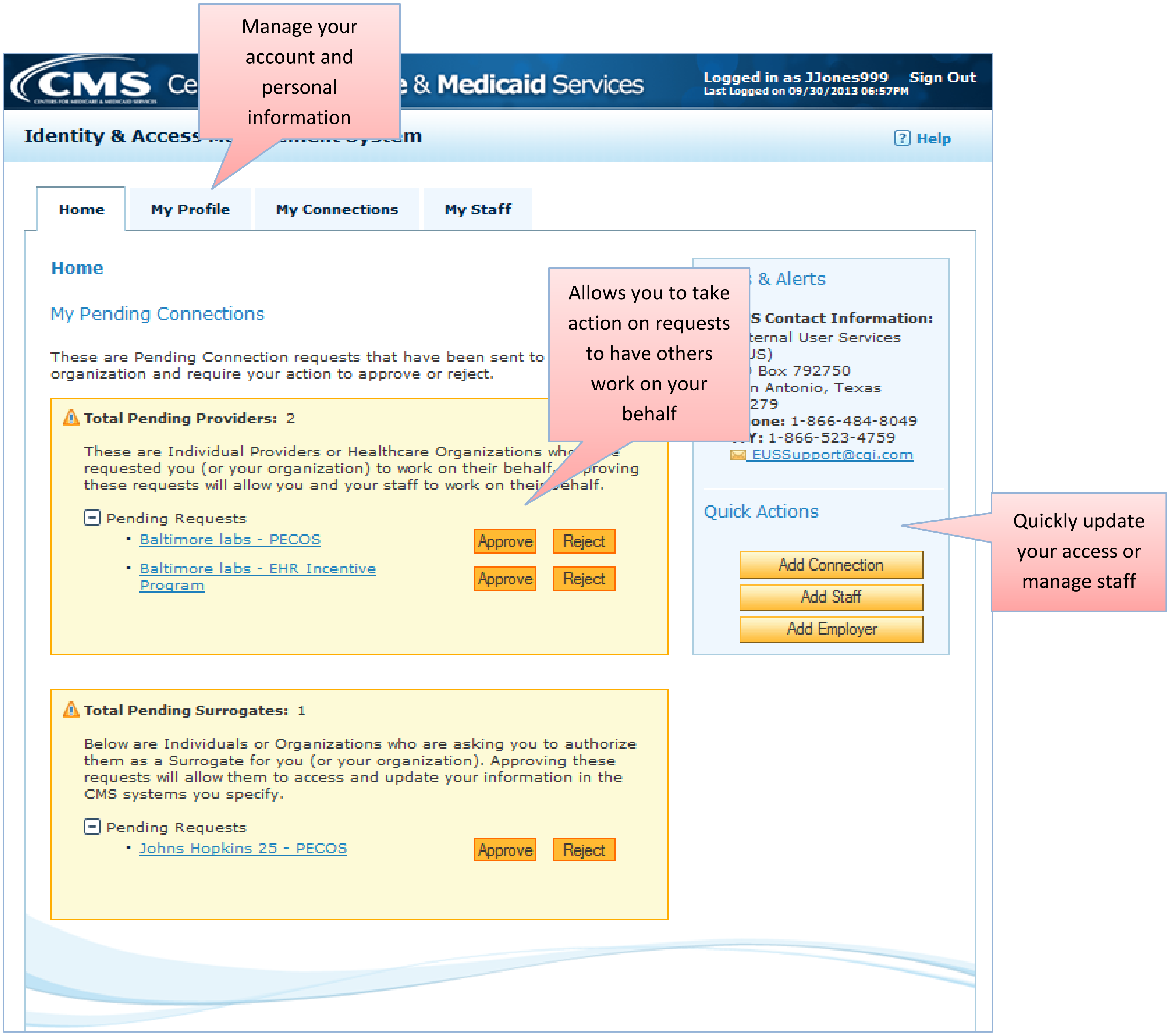
Screens

The **Sign In** page is the first screen users will see when they access the Identity & Access Management System.

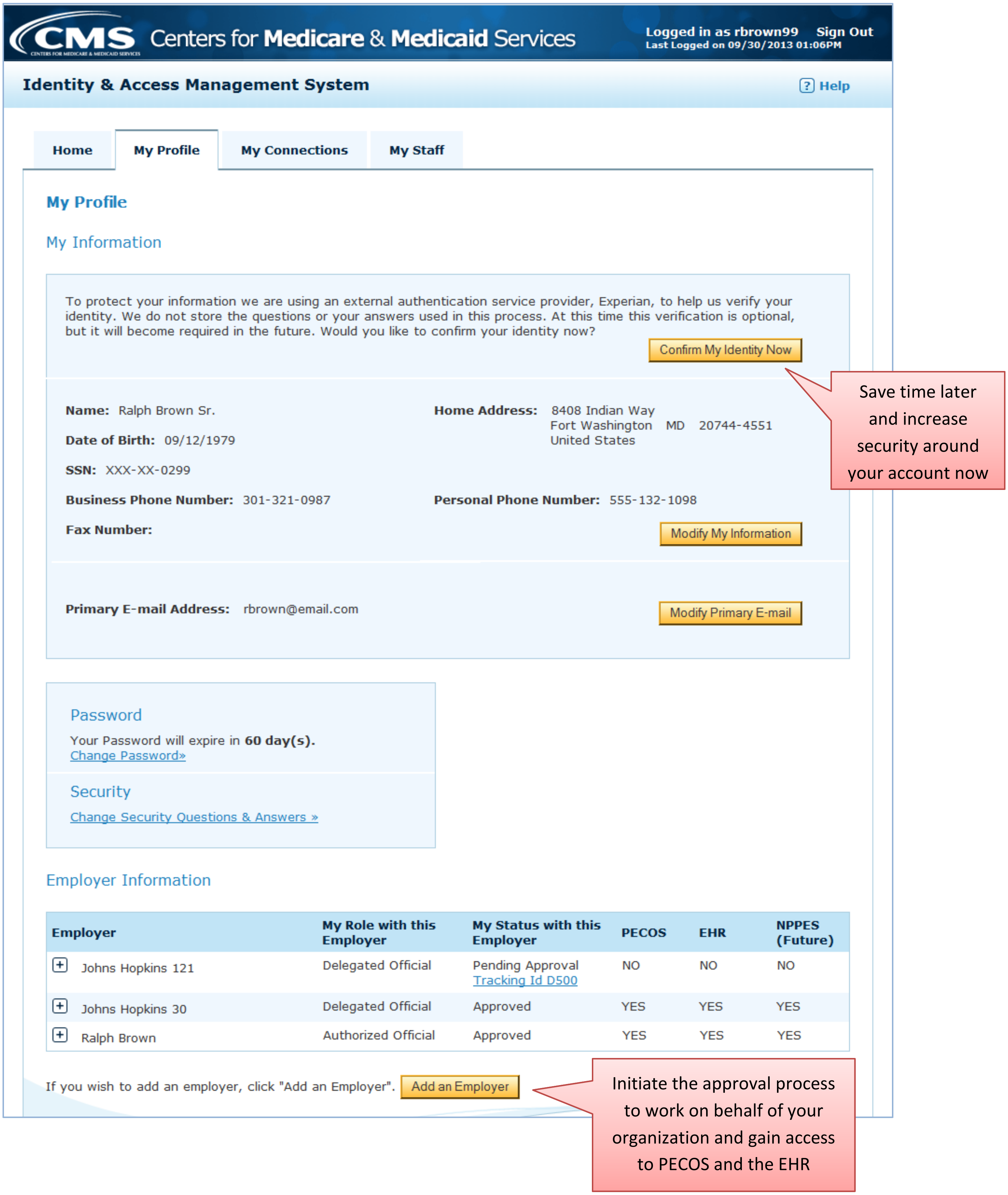



CMS Centers for Medicare & Medicaid Services
Logged in as bjones999
Sign Out
Identity & Access Management System
Help
User Registration - User Information
Step 1 User Security
Step 2 User Info
Step 3 User Identity
Final Review
Please provide the details below. They will be used to verify your identity.
« Back to Previous Page
* indicates required field(s)
* First Name:
Barbara
Middle Name:
* Last Name:
Jones
Suffix:
* Business Phone Number:
(410)-555-9876
Fax Number:
* Date of Birth:(MM/DD/YYYY)
01/02/1993
* SSN:
000-11-1234
Primary E-mail Address:
bjones@jonesbilling.com
* Personal Phone Number:
(410)-555-5432
* Home Address Line 1:
111 West Rd
Home Address Line 2:
* City:
Towson
* Country:
United States
* State/ Province/ Territory:
MD - MARYLAND
* Postal/ZIP Code:
21204
Personal Information that will be used to validate your identity. This should be information personal to you, the user.
Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. We will share your Social Security number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records.
Do you want to confirm your identity now?
Confirm my identity now
I will confirm my identity later
Confirming your identity will increase security around your account, and will save time later when it becomes mandatory
I Agree
Cancel

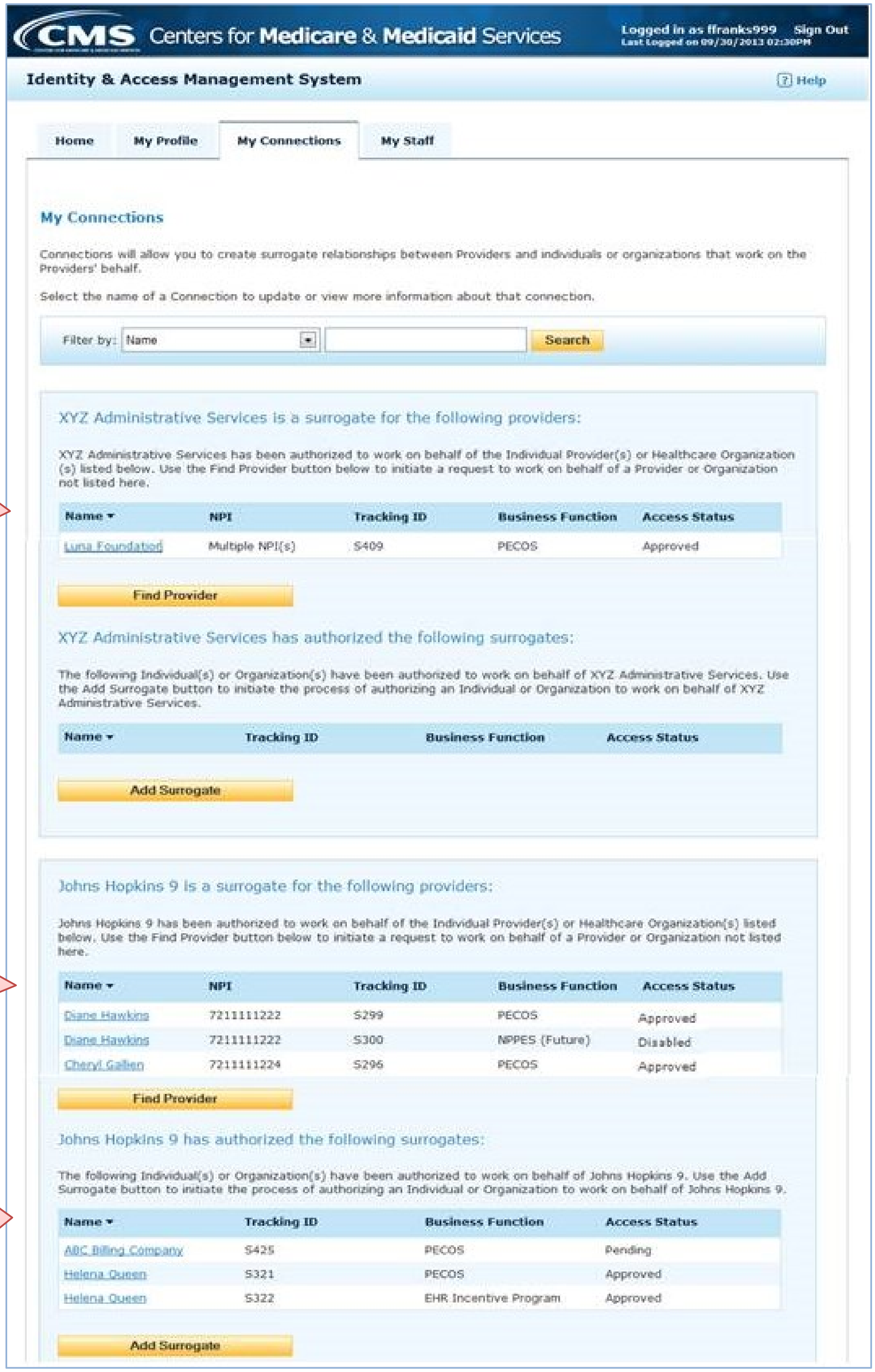
The **Home** Page will display different features depending on the role you play in your organization or in the Medicare program.



The **My Profile** pages enable users to view and modify their personal and employer information.



My Connections allows users to view provider and surrogate connections for each of their employers.



CMS Centers for Medicare & Medicaid Services

Logged in as ffranks999 Sign Out
Last Logged on 09/30/2013 02:30PM

Identity & Access Management System

Help

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.

Filter by: Name Search

XYZ Administrative Services is a surrogate for the following providers:

XYZ Administrative Services 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.

Name	NPI	Tracking ID	Business Function	Access Status
Luna Foundation	Multiple NPI(s)	S409	PECOS	Approved

Find Provider

XYZ Administrative Services has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of XYZ Administrative Services. Use the Add Surrogate button to initiate the process of authorizing an Individual or Organization to work on behalf of XYZ Administrative Services.

Name	Tracking ID	Business Function	Access Status

Add Surrogate

Johns Hopkins 9 is a surrogate for the following providers:

Johns Hopkins 9 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.

Name	NPI	Tracking ID	Business Function	Access Status
Diane Hawkins	7211111222	S299	PECOS	Approved
Diane Hawkins	7211111222	S300	NPPES (Future)	Disabled
Cheryl Gallien	7211111224	S296	PECOS	Approved

Find Provider

Johns Hopkins 9 has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of Johns Hopkins 9. Use the Add Surrogate button to initiate the process of authorizing an Individual or Organization to work on behalf of Johns Hopkins 9.

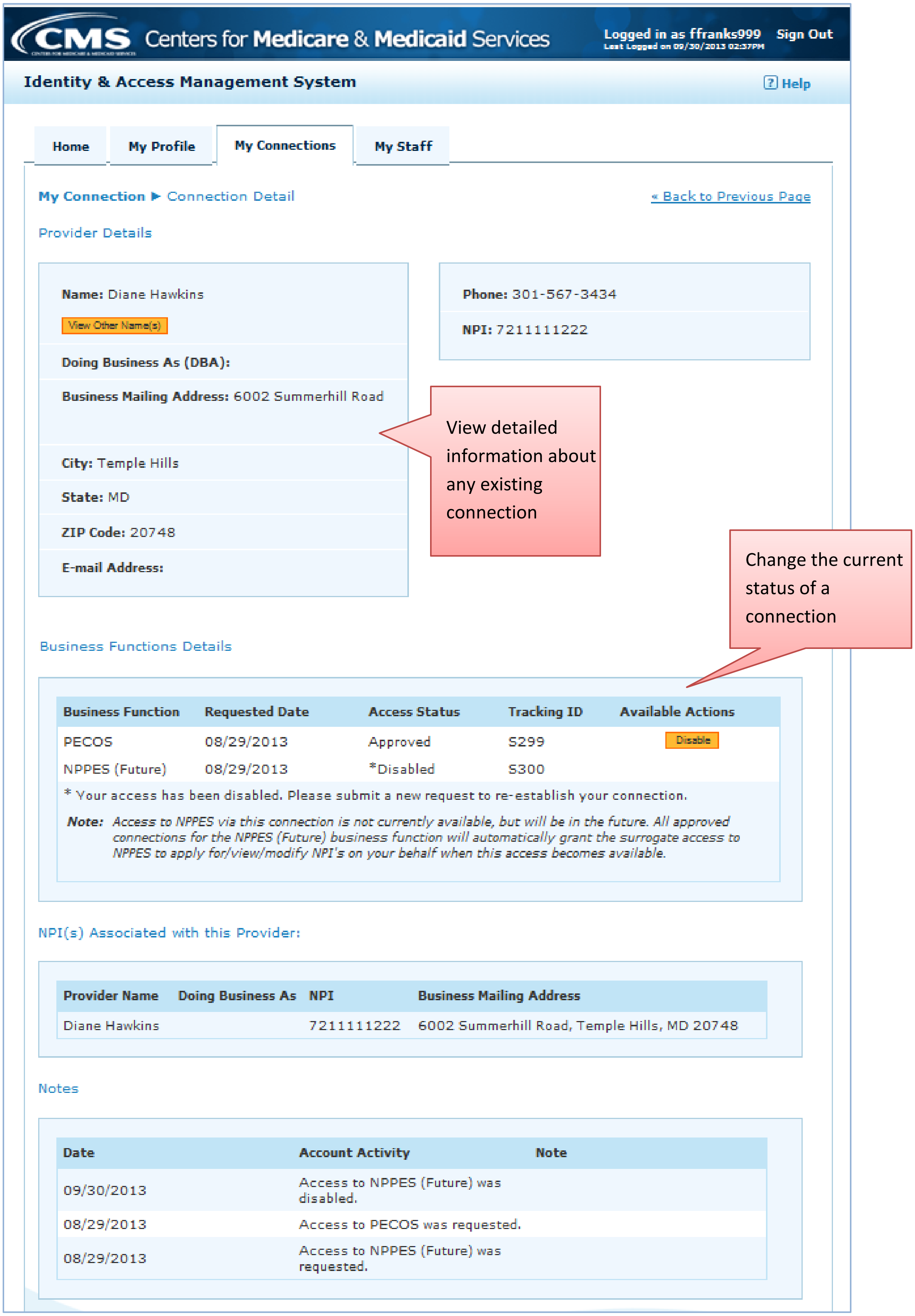
Name	Tracking ID	Business Function	Access Status
ABC Billing Company	S425	PECOS	Pending
Helena Queen	S321	PECOS	Approved
Helena Queen	S322	EHR Incentive Program	Approved

Add Surrogate

View a list of health care organizations that you are working for

View a list of the providers that you are working for

View a list of individuals or organizations that are working on your behalf



CMS Centers for Medicare & Medicaid Services

Logged in as ffranks999 Sign Out
Last Logged on 09/30/2013 02:37PM

Identity & Access Management System

Help

Home | My Profile | My Connections | My Staff

My Connection ▶ Connection Detail

« Back to Previous Page

Provider Details

Name: Diane Hawkins

View Other Name(s)

Doing Business As (DBA):

Business Mailing Address: 6002 Summerhill Road

City: Temple Hills

State: MD

ZIP Code: 20748

E-mail Address:

Phone: 301-567-3434

NPI: 7211111222

View detailed information about any existing connection

Change the current status of a connection

Business Functions Details

Business Function	Requested Date	Access Status	Tracking ID	Available Actions
PECOS	08/29/2013	Approved	S299	Disable
NPPES (Future)	08/29/2013	*Disabled	S300	

* Your access has been disabled. Please submit a new request to re-establish your connection.

Note: *Access to NPPES via this connection is not currently available, but will be in the future. All approved connections for the NPPES (Future) business function will automatically grant the surrogate access to NPPES to apply for/view/modify NPI's on your behalf when this access becomes available.*

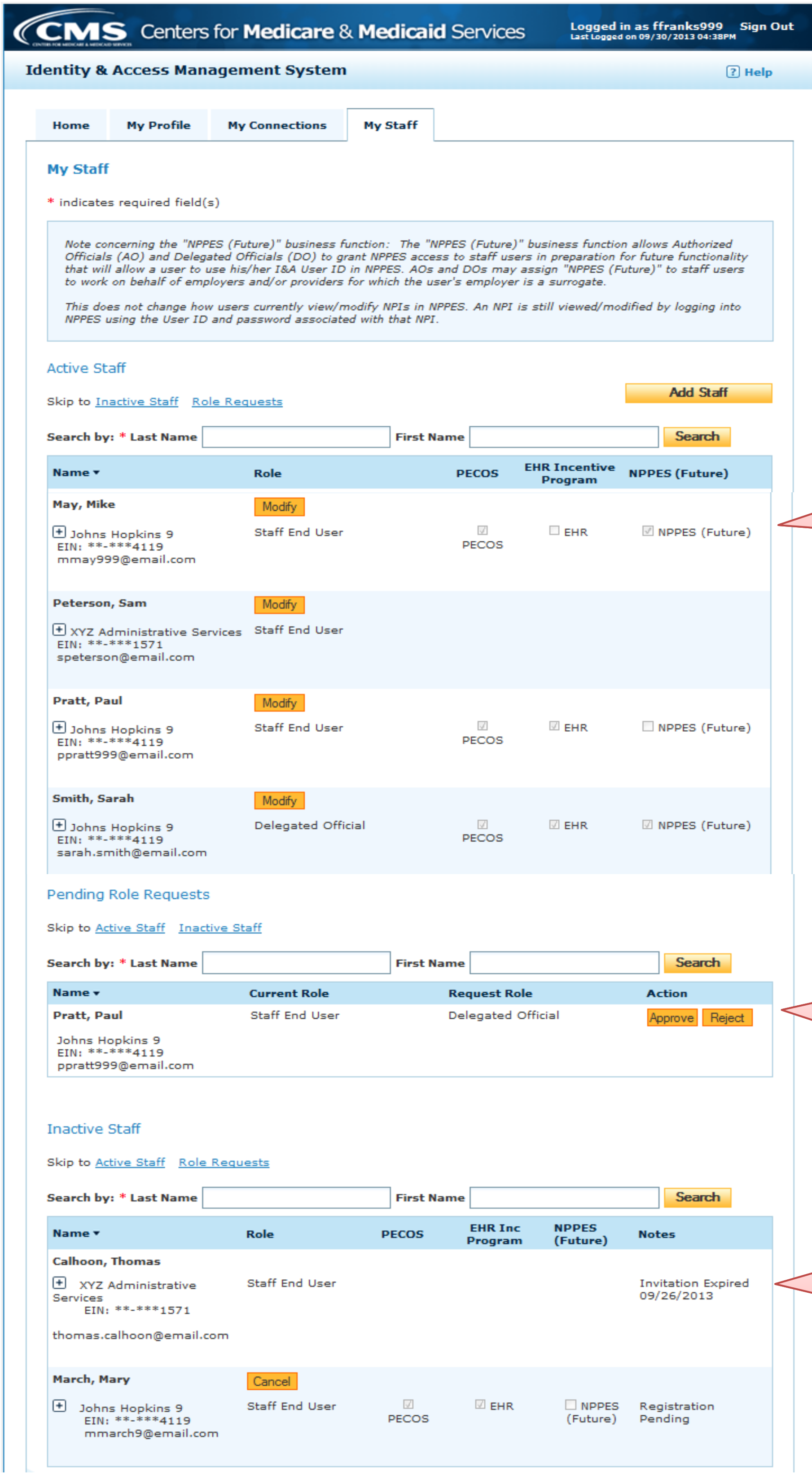
NPI(s) Associated with this Provider:

Provider Name	Doing Business As	NPI	Business Mailing Address
Diane Hawkins		7211111222	6002 Summerhill Road, Temple Hills, MD 20748

Notes

Date	Account Activity	Note
09/30/2013	Access to NPPES (Future) was disabled.	
08/29/2013	Access to PECOS was requested.	
08/29/2013	Access to NPPES (Future) was requested.	

The **My Staff** pages enable AOs, DOs, and Individual Providers to manage their staff users.



View and manage staff access to PECOS and the EHR Incentive Program

Manage role changes for staff

View pending and inactive staff

Appendix A – Acronyms, Key Terms, and Definitions

Acronym	Description
EHR RNA	Electronic Health Records Registration & Attestation System
EUS	External User Services
HITECH	Health Information Technology for Economic and Clinical Health Act
I&A	Identity & Access system
IP	Individual Provider
NPI	National Provider Identifier
NPPES	National Plan & Provider Enumeration System
PECOS	Provider Enrollment, Chain and Ownership System
Staff End User (SEU)	Staff user who is allowed to work for an EIN/organization but does not have the authority to perform AO and DO tasks. Staff End Users only have access to those EINs, Individual Providers, and Business Functions granted to them by an AO or DO.
Status – Account/Profile	**Account/Profile Status** – Status of the user's account/profile. This is not the same as the user's status with his employer(s). ♦ **Active** – user successfully ID-proofed and can see his Home page and profile information (what he sees for the employer info is dependent on the status the user has with his employer(s)) ♦ **Deactivated** – deactivated by EUS (User must have their account Reactivated by EUS) ♦ **Locked** – account/profile is locked because a password was entered incorrectly three times (The user must have their password reset by EUS) ♦ **Disabled** – account has been "disabled" due to inactivity > X days but < Y days. (The user must reset their password.) ♦ **Archived** – account/profile has been archived due to inactivity > Y days. (The user must create a new account/profile.)
Status – Connection	Connection Status – Status of the a connection between two entities (provider + surrogate) ♦ **Approved** – Connection has been approved ♦ **Pending** – Connection request has been submitted but it has not yet been acted on ♦ **Disabled** – Previously approved connection has been disabled ♦ **Rejected** – Connection request was rejected and was never approved OR was not acted on within 30 days of its initiation ♦ **Deactivated** – Last Provider NPI associated with connection has been deactivated
Status – E-mail	E-mail Status – status of an e-mail address ♦ **Validated** – e-mail address has been validated ♦ **Pending Validation** – e-mail address has been submitted for validation but user has not yet responded to the validation request ♦ **Not Validated** – e-mail address has not been validated nor has it been submitted for validation

Acronym	Description
Status – Employer	Employer Status – Status of the user with regards to employer(s). A user will have a status for each employer. ♦ **Approved** – user has been approved for the employer ♦ **Pending Approval** – user has not yet been approved for the employer. This may occur in the following situations: • AO or DO awaiting vetting and approval by EUS for a new employer • DO awaiting approval by AO for a new employer • DO or Staff End User awaiting approval of a role change request ♦ **Disassociated** – user no longer has access to the employer ♦ **Rejected** – request for approval was rejected ♦ **Archived** – User's User ID has been archived
Status – Invitation	Invitation Status – status of a staff invitation request issued by an AO/DO/IP to a new staff user ♦ **Registration Pending** – an invitation has been issued but has not yet been responded to/acted on ♦ **Registration Cancelled** – a pending registration invitation was cancelled before the staff user responded to the invitation ♦ **Expired** – an invitation request that has been Pending Registration for more than 72 hours ♦ **Accepted** – invitation has been accepted by the user who received it
Status - PIN	PIN Status – status of a PIN that has been issued following a request ♦ **Active** – PIN is still active and can be used ♦ **Expired** – PIN has expired and can no longer be used. ♦ **Used** – PIN has been used and cannot be reused ♦ **Cancelled** – the action taken that resulted in the generation of the PIN was cancelled (e.g., when an AO/DO/IP cancels a staff user's invitation before that staff user registers.) ♦ **Deactivated** – a user attempted to use PIN but was not able to enter the correct e-mail address in three tries. The PIN has been deactivated and cannot be used.