PECOS Check

Prepared for

myUnity Essentials Financial

Netsmart

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Overview

This document (for Non-Clinical clients) outlines the steps for updating the PECOS verified status for doctors prior to billing. Medicare requires that physicians submitted on the claim form are PECOS enrolled. Agencies using clinical software should verify the PECOS information there.

Process

Download the PECOS File

Go to https://data.cms.gov and download the Order and Referring data file in CSV format. Save the file to an accessible drive on your computer.

Run the PECOS Check

Go to **File > File Lists > Entity > Entity Lists.**

Report Sequence: Alphabetic or Numeric

Type: Doctor

Report Options: check Extended Data (shows NPI and PECOS date)

Click on the **Pecos Check** tab.

Doctor Include Options: All Doctors

Pecos Update: Update Verified Date

Click the button to browse to and select the PECOS CSV file that was downloaded from CMS.

Pecos File Format: 10 Digit NPI (only select 4 Digit if CMS changes the file format)

Matching Options: Both First/Last Names

Press **Preview** and press the button to jump to the last page of the report. This runs the PECOS check for all doctors in the report and marks their record with the current date so you know the last time a PECOS check was run.

When finished, you can run the report again for **Only Bad/Missing NPI** to identify any doctor records that didn't get marked as PECOS enrolled. Confirm the doctor's first name, last name and NPI match the information in the PECOS CSV file. Prefixes and suffixes should be in the corresponding fields and not in the first or last name fields.

Agencies should check CMS's website regularly as CMS updates this file periodically. Its recommended to verify the PECOS status for doctors prior to billing.