

**Individuals Authorized Access to  
the C M S Computer Services  
Accessible (IACS) User Guide  
Attachment A**

**MA/MA-PD/PDP/CC – Medicare Advantage/Medicare  
Advantage-Prescription Drug/Prescription Drug Plan/Cost  
Contracts**

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## Important Note

The ***IACS User Guide Main Body*** contains information about and instructions on how to complete procedures that are *applicable to all IACS users*. You must have an understanding of these procedures and information to understand what is presented in this Attachment.

Please read the ***IACS User Guide Main Body*** before you begin to use this Attachment. It can be found under General User Guides and Resources at: [www.CMS.hhs.gov/IACS](http://www.CMS.hhs.gov/IACS)

This IACS Help Document Attachment provides instructions on how to:

1. Complete the ***Access Request*** portion of the ***New User Registration*** screen for Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts, MA/MA-PD/PDP/CC.
2. Modify your account profile.
3. Access your desired C M S plans.

## A 1.0 MA/MA-PD/PDP/CC Access Request Fields

### A 1.1 MA/MA-PD/PDP/CC – Generic Registration Fields and Screens

When you began your registration process, you selected the **New User Registration** hyperlink on the **Account Management** screen. The system then displayed the **New User Registration Menu** screen illustrated in Figure A 1.

#### Figure A 1: New User Registration Menu Screen

The figure displays the New User Registration Menu screen.

There are two sections: the top section is for the C M S User Communities and the bottom section is for C M S Applications.

This screen shows a listing of the current user communities and applications that C M S provides access to. These are shown on the screen as active hyperlinks, each hyperlink representing the name of a C M S application, system access area, or user community.

As C M S increases the number of applications it provides access to and the user communities it serves, the list of selections on this screen will also increase.

End of figure.

You then selected the hyperlink for the MA/MA-PD/PDP/CC application, as illustrated in Figure A 1, and the **New User Registration** screen opened.

You completed the **User Information** portion of this screen according to the instructions provided in the IACS User Guide Main Body.

Up until this point, the information you provided was generic and identified you to IACS. Now we will examine the information fields that are specific to the MA/MA-PD/PDP/CC application.

## **A 1.2 MA/MA-PD/PDP/CC – Specific Access Request Fields and Screens by Role**

In the **Access Request** portion of the **New User Registration** screen, as illustrated in Figure A 2, the *User Type* field will be pre-populated with the MA/MA-PD/PDP/CC application selection you made on the **New User Registration Menu** screen. A *Role* field and *Justification for Action* field are also displayed.

### **Figure A 2: MA/MA-PD/PDP/CC – User Type Displayed**

The figure displays the Access Request portion of the new user registration screen. The user type field shows the pre selected application for this user, it is the MA/MA-PD/PDP/CC application. Also displaying are a role field and a justification for action field. The screen shows two navigation buttons, a next button and a cancel button.

End of figure.

The *Role* field contains a drop-down list of Roles as illustrated in Figure A 3.

### **Figure A 3: MA/MA-PD/PDP/CC – Role Drop-down List**

The figure displays the Access Request portion of the new user registration screen as previously described. However, in this figure, the drop down list in the role field is displayed. The roles that are shown are discussed in detail after this figure.

End of figure.

You may select one of the following roles for the MA/MA-PD/PDP/CC application:

- **MA (Medicare Advantage) Submitter** – This role will be able to view all application screens and all information for the periods during which the beneficiary was enrolled in the user's plan, **including** Batch File Status and Report Order screens. Pre Enrollment information is viewable for any beneficiary.
- **PDP (Prescription Drug Plan) Submitter** – This role will be able to view only Part D information on all application screens for the periods during which the beneficiary was enrolled in the user's plan, **including** Batch File Status and Report Order screens. Pre Enrollment information is viewable for any beneficiary.
- **MA Representative** – This role will be able to view all application screens and all information for the periods during which the beneficiary was enrolled in the user's plan, **except for** the Batch File Status and Report Order screens. Pre Enrollment information is viewable for any beneficiary.
- **PDP Representative** – This role will be able to view only Part D information on all application screens for the periods during which the beneficiary was enrolled in the user's plan, **except for** Batch File Status and Report Order screens. Pre Enrollment information is viewable for any beneficiary.
- **POSFE (Point-of-Sale Facilitated Enrollment) Contractor** – This role will be able to view only the application Pre Enrollment and Enrollment screens. Pre

Enrollment information is viewable for any beneficiary. Enrollment information is limited to Contract/PDP/Segment Numbers and Effective Dates, Drug Plan, Part D Opt Out, Part D Prescription (Rx) Drug information, and Added Date for any beneficiary.

- **Approver** – This role will not have access to the application.
- **IUI (Integrated User Interface) Helpdesk** – This role will be able to view all application screens and information, **except for** the Report Order screens.
- **IUI Administrator** – This role will be able to view all application screens and information, **except for** the Report Order screens.

#### Figure A 4: MA/MA-PD/PDP/CC – Role Selection

The figure displays the Access Request portion of the new user registration screen as previously described with the role field drop down list displayed. However, in this figure there is a graphic arrow that points to these roles and indicates the user must select a role.

End of figure.

**Action:** In the *Role* field, select your desired **Role** as illustrated in Figure A 4.

Information you will need to register for the above roles is provided in the following subsections.

#### A 1.2.1 MA Submitter and PDP Submitter Roles

When you select the role of **MA Submitter** or **PDP Submitter**, the screen will refresh and *Contract Number* fields will display as illustrated in the example in Figure A 5. If you are an **MA Submitter**, you may enter a Contract Number (example: Hxxxx or Sxxxx) in the fields displaying, which are:

- *Plan Contract Number* field,
- Prescription Drug Event, *PDE Mailbox Number* field, and or
- Risk Adjustment Processing System, *RAPS Mailbox Number* field.

You can enter Contract Numbers in any, or all, of the Contract/Mailbox Number fields as they apply to your work. All types of Contract Numbers are acceptable.

However, if you are a **PDP Submitter**, you may only enter **S** type Contract Numbers in the *Plan Contract Number*, *PDE Mailbox Number*, and or the *RAPS Mailbox Number* fields.

**PDP Submitters** can enter **S** Contract Numbers in any, or all, of the Contract/Mailbox Number fields as they apply to their work.

**Contract Level Security:** Application users can only view beneficiary information for those beneficiaries who have been enrolled in the user's plan, based on the user's assigned contract numbers.

**Example:** If a beneficiary has multiple contracts and a user is assigned access to only one contract for the beneficiary, then the user will only be authorized to view the beneficiary information which matches the user's authorized contract number.

#### Figure A 5: MA or PDP Submitter – Contract Number Fields

The figure displays the Access Request portion of the new user registration screen for the role of MA Submitter. For this role the screen displays the plan contract, PDE mailbox, and RAPS mailbox number fields each with an add button to the right of the field. Also displayed are a RACF ID field and a justification for action field. In this figure a graphic arrow points to the three number fields and indicates that users must enter their contract numbers in these fields one at a time and must select the Add button, to the right of the field to submit each contract number.

End of figure.

**Action:** Enter contract numbers (example: Hxxxx, or Sxxxx) one at a time in the appropriate fields. The fields are illustrated in Figure A 5.

**Action:** Select the **Add** button to record each entry.

- If you enter an invalid contract number, the screen will refresh and a warning message will appear near the top of the screen informing you of this and requesting that you enter a valid contract number. Move down the page to the contract number fields and enter a valid contract number.
- Contract numbers must be entered one at a time. Select the **Add** button after each entry.

**Note:** Once a contract number has been added to the registration screen, it **cannot be changed or removed**. Please ensure that you are requesting a valid contract for you to access on behalf of your company prior to selecting the **Add** button. If you enter an incorrect contract number, you must cancel your registration request and start a new request.

After each contract number is entered, the screen will refresh and display the entered Contract Numbers in separate, labeled fields under the *Plan Contract Number*, *PDE Mailbox Number*, and *RAPS Mailbox Number* fields. This is illustrated in Figure A 6.

Below the entered Contract Number fields is an additional field for you to enter your RACF ID if you have this ID number.

### Figure A 6: MA or PDP Submitter – Contract Number Entry and RACF ID Screen

The figure displays the Access Request portion of the new user registration screen for the role of MA Submitter as described in the previous figure. However, in this figure, above the RACF ID field, contract numbers are now displayed to illustrate how they would appear on screen after a user adds them to his or her request. In this figure a graphic arrow points to the contract numbers to draw attention to them.

Navigation buttons remain the same, a next button and a cancel button.

End of figure.

**Action:** Enter your **RACF ID**, if you have one.

**Note:** The RACF ID should be entered in all UPPER case characters. If you have forgotten your RACF ID, **STOP** and call your Help Desk to obtain your RACF ID information.

If you do not have a RACF ID at the time you complete your IACS New User Registration and your role requires that you have one, the system will automatically assign you a RACF ID once your request is approved.

**Attention Existing C M S System Users:** If you have already been assigned a RACF ID to access C M S systems, for example, HPMS, you must enter this ID when you register for IACS. The IACS system enforces this rule based on your Social Security Number, SSN.

Once you've been approved as an IACS user, your RACF and IACS passwords will automatically be synchronized, as long as you use IACS for all future password changes.

Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

### Figure A 7: MA or PDP Submitter – Justification for Action Field

The figure displays the Access Request portion of the new user registration screen for the role of MA Submitter as described in the previous figure except that in this illustration there is a graphic arrow to draw attention to the justification for action field which has the justification, "Need for work" entered in it. Another graphic arrow indicates the next button, which the user would select if they had completed entries on this screen.

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure A 7. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the data you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with a warning message at the top of the screen informing you what data needs to be corrected or of required fields that still need to be addressed.

When the data in all fields is valid and all required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen.

Go to the **Completing Your New User Registration** section in the IACS User Guide Main Body, for an example of the **Review Registration Details** screen. This section also explains how to complete the IACS new user registration process.

### A 1.2.2 MA Representative and PDP Representative Roles

When you select the role of **MA Representative** or **PDP Representative**, the screen will refresh and a *Plan Contract Number* field will display as illustrated in the example in Figure A 8. If you are a **MA Submitter**, you may enter all types of Contract Numbers.

If you are a **PDP Representative**, you may only enter **S** type Contract Numbers in the *Plan Contract Number* field,

#### Figure A 8: MA or PDP Representative – Contract Number Field

The figure displays the Access Request portion of the new user registration screen for the role of MA Representative. The same screen would display for the role of PDP Representative.

For this role the screen displays only the plan contract number field with an add button to the right of the field. Also displayed are a RACF ID field and a justification for action field. In this figure a graphic arrow points to the plan contract number field and indicates the user must enter their contract numbers in this field one at a time and must select the Add button, to the right of the field to submit each contract number.

Navigation buttons remain the same, a next button and a cancel button.

End of figure.

**Action:** Enter **Contract Numbers** (example: Sxxxx) one at a time.

**Action:** Select the **Add** button to record each entry.

- If you enter an invalid contract number, the screen will refresh and a warning message will appear near the top of the screen informing you of this and requesting that you enter a valid contract number. Move down the page to the contract number fields and enter a valid contract number.
- Contract numbers must be entered one at a time. Select the **Add** button after each entry.

**Note:** Once a contract number has been added to the registration screen, it **cannot be changed or removed**. Please ensure that you are requesting a valid contract for you to access on behalf of your company prior to selecting the **Add** button. If you enter an incorrect contract number, you must cancel your registration request and start a new request.

After the Contract Numbers are entered, the screen will refresh and display the entered **Contracts** as illustrated in the example in Figure A 9.

**Reminder:** Contract numbers can only be added **one at a time**.

Below the displayed **Contracts**, there is the *RACF ID* field for you to enter your RACF ID, if you have one.

**Figure A 9: MA or PDP Representative – Contract Number Entry and RACF ID Screen**

The figure displays the Access Request portion of the new user registration screen for the role of MA Representative as described in the previous figure except that in this illustration, above the RACF ID field, a contract number is now displayed to illustrate how it would appear on screen after a user adds it to his or her request. In this figure a graphic arrow points to the contract number to draw to it.

End of figure.

**Action:** Enter your **RACF ID**, if you have one.

**Note:** The RACF ID should be entered in all UPPER case characters. If you have a RACF ID, but cannot remember it, **STOP** and call your Help Desk to obtain your RACF ID information.

**Attention Existing C M S System Users:** If you have already been assigned a RACF ID to access C M S systems, for example, HPMS, you must enter this ID when you register for IACS. The IACS system enforces this rule based on your Social Security Number, SSN.

Once you've been approved as an IACS user, your RACF and IACS passwords will automatically be synchronized, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

**Figure A 10: MA or PDP Representative – Justification for Action Field**

The figure displays the Access Request portion of the new user registration screen for the role of MA Representative as described in the previous figure except that in this illustration there is a graphic arrow to draw attention to the justification for action field which must be completed after the user has finished making entries to this screen.

End of figure

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure A 10. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the data you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with a warning message at the top of the screen informing you what data needs to be corrected or of required fields that still need to be addressed.

When the data in all fields is valid and all required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen.

Go to the **Completing Your New User Registration** section in the IACS User Guide Main Body, for an example of the **Review Registration Details** screen. This section also explains how to complete the IACS new user registration process.

### **A 1.2.3 POSFE Contractor Role**

When you select the role of **POSFE Contractor**, the screen will refresh and display a *RACF ID* field as illustrated in Figure A 11. The IACS system automatically assigns a Contract Number to you when you select this role.

The only information you must enter in the **Access Request** portion of the screen is your RACF ID, if you have one, and a brief justification statement in the *Justification for Action* field giving the justification for your access request.

**Action:** Enter your **RACF ID**, if you have one.

**Note:** The RACF ID should be entered in all UPPER case characters. If you have a RACF ID, but cannot remember it, **STOP** and call your Help Desk to obtain your RACF ID information. If you do not have a RACF ID, the system will automatically assign one.

**Attention Existing C M S System Users:** If you have already been assigned a RACF ID to access C M S systems such as HPMS, you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN.

Once you've been approved as an IACS user, your RACF and IACS passwords will automatically be synchronized, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

#### **Figure A 11: POSFE Contractor – Data Input Fields**

The figure displays the Access Request portion of the new user registration screen for the role of POSFE Contractor.

For this role the screen displays only the role field, a RACF ID field, and a justification for action field. Navigation buttons remain the same, a next button and a cancel button.

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the data you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with a warning message at the top of the screen informing you what data needs to be corrected or of required fields that still need to be addressed.

When the data in all fields is valid and all required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen.

Go to the **Completing Your New User Registration** section in the IACS User Guide Main Body, for an example of the **Review Registration Details** screen. This section also explains how to complete the IACS new user registration process.

#### A 1.2.4 Approver Role

When you select the role of **Approver**, the screen will refresh and a *Contract Number* field will display as illustrated in Figure A 12.

##### Figure A 12: MA/MA-PD/PDP/CC Approver – Data Input Fields

The figure displays the Access Request portion of the new user registration screen for the role of Approver.

For this role the screen displays only the plan contract number field with an add button to the right of the field. Also displayed are a RACF ID field and a justification for action field. In this figure a graphic arrow points to the plan contract number field and indicates the user must enter their contract numbers in this field one at a time and must select the Add button, to the right of the field to submit each contract number.

Navigation buttons remain the same, a next button and a cancel button.

End of figure.

**Action:** Enter *Contract Numbers* such as Hxxxx, or Sxxxx, one at a time.

**Action:** Select the **Add** button to record each entry.

- If you enter an invalid contract number, the screen will refresh and a warning message will appear near the top of the screen informing you of this and requesting that you enter a valid contract number. Move down the page to the contract number fields and enter a valid contract number.
- Contract numbers must be entered one at a time. Select the **Add** button after each entry.

**Note:** Once a contract number has been added to the registration screen, it **cannot be changed or removed**. Please ensure that you are requesting a valid contract for you to access on behalf of your company prior to selecting the **Add** button. If you enter an incorrect contract number, you must cancel your registration request and start a new request.

After the contract numbers is entered, the screen will refresh as illustrated in Figure A 13.

##### Figure A 13: MA/MA-PD/PDP/CC Approver – Justification for Action Field

The figure displays the Access Request portion of the new user registration screen for the role of Approver as described in the previous figure except that in this illustration there are graphic arrows to draw attention to the justification for action field, which must be completed after the user has finished making entries to this screen, and the next navigation button, which the user would select when he or she has completed their entries on this screen.

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the data you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with a warning message at the top of the screen informing you what data needs to be corrected or of required fields that still need to be addressed.

When the data in all fields is valid and all required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen.

Go to the **Completing Your New User Registration** section in the IACS User Guide Main Body, for an example of the **Review Registration Details** screen. This section also explains how to complete the IACS new user registration process.

### **A 1.2.5 IUI Help Desk Role**

When you select the role of **IUI Help Desk**, the screen will refresh and a *RACF ID* field will display as illustrated in Figure A 14.

The only information you must enter in the **Access Request** portion of the screen is your RACF ID, if you have one, and a brief justification statement in the *Justification for Action* field giving the justification for your access request.

#### **Figure A 14: IUI Help Desk – Data Input Fields**

The figure displays the Access Request portion of the new user registration screen for the role of IUI Helpdesk.

For this role the screen displays only the role field, a RACF ID field, and a justification for action field. Navigation buttons remain the same, a next button and a cancel button.

End of figure.

**Action:** Enter your **RACF ID**, if you have one.

**Note:** The RACF ID should be entered in all UPPER case characters. If you have a RACF ID, but cannot remember it, **STOP** and call your Help Desk to obtain your RACF ID information. If you do not have a RACF ID, the system will automatically assign one.

**Attention Existing C M S System Users:** If you have already been assigned a RACF ID to access C M S systems, for example, HPMS, you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN. Once you've been approved as an IACS user, your RACF and IACS passwords will automatically be synchronized, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure A 14. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the data you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with a warning message at the top of the screen informing you what data needs to be corrected or of required fields that still need to be addressed.

When the data in all fields is valid and all required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen.

Go to the **Completing Your New User Registration** section in the IACS User Guide Main Body, for an example of the **Review Registration Details** screen. This section also explains how to complete the IACS new user registration process.

### **A 1.2.6 IUI Administrator Role**

When you select the role of **IUI Administrator**, the screen will refresh and a *RACF ID* field will display as illustrated in Figure A 15.

The only information you must enter in the **Access Request** portion of the screen is your RACF ID, if you have one and a brief justification statement in the *Justification for Access* field giving the justification for your access request.

#### **Figure A 15: IUI Administrator – Data Input Fields**

The figure displays the Access Request portion of the new user registration screen for the role of IUI Administrator.

For this role the screen displays only the role field, a RACF ID field, and a justification for action field. Navigation buttons remain the same, a next button and a cancel button.

End of figure.

**Action:** Enter your **RACF ID**, if you have one.

**Note:** The RACF ID should be entered in all UPPER case characters. If you have a RACF ID, but cannot remember it, **STOP** and call your Help Desk to obtain your RACF ID information. If you do not have a RACF ID, the system will automatically assign one.

**Attention Existing C M S System Users:** If you have already been assigned a RACF ID to access C M S systems, for example, HPMS, you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN. Once you've been approved as an IACS user, your RACF and IACS passwords will automatically be synchronized, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure A 15. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the data you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with an error message at the top of the screen informing you what data needs to be corrected or of required fields that still need to be addressed.

When the data in all fields is valid and all required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen.

Go to the **Completing Your New User Registration** section in the IACS User Guide Main Body, for an example of the **Review Registration Details** screen. This section also explains how to complete the IACS new user registration process.

## A 2.0 MA/MA-PD/PDP/CC Modify Account Profile

You may need to modify your IACS account profile to add contract numbers to the list of those to which you already have access, to delete contract numbers to which you no longer need access, or add a C M S User Community role to your profile.

The following steps and screens show how to access your profile account in IACS to make desired modifications.

**Action:** Browse to <https://applications.CMS.hhs.gov> on the C M S website.

The **C M S Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure A 16.

### Figure A 16: C M S Applications Portal WARNING/REMINDER Screen

The figure displays the C M S Government Computer System Warning/Reminder screen which contains important user information.

Two navigation buttons are at the bottom of the screen; an Enter C M S Applications Portal button which will provide access the C M S Applications Portal and a Leave button which will bring the user to the C M S Website.

Additional hyperlinks on this screen are in the screen banner and a navigation bar at the top of the screen.

The screen banner hyperlink is a hyperlink to the Health and Human Services web site.

The top navigation bar has hyperlinks to various screens on the Centers for Medicare and Medicaid (C M S) web site. These hyperlinks are: a hyperlink to the C M S Applications Portal Home screen (this is the current screen), a hyperlink to the C M S web site Home Page, a hyperlink to the C M S web site F A Qs, a feedback hyperlink to the C M S feedback screen, a hyperlink to the C M S web site Help screen, an email hyperlink that enables the user to send this page to someone, and a print icon that will print the current page.

End of figure.

**Action:** Read the important information on this screen and indicate your agreement by selecting the **Enter C M S Applications Portal** button.

If you do not want to proceed any further and you want to exit, select the **Leave** button.

The **C M S Applications Portal Introduction** screen will display as illustrated in Figure A 17.

### Figure A 17: C M S Applications Portal Introduction Screen

The figure displays the C M S Applications Portal Introduction screen.

An additional navigation menu bar has been added to the top of the screen. The additional hyperlinks now available are:

Introduction, this is the current screen

Account Management, a hyperlink to registration and user management services required to access applications within C M S's Applications Portal

Plans, a hyperlink to Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans

Providers, a hyperlink to Providers that participate in the Medicare program such as Hospitals and Physicians

End of figure.

**Action:** Select the **Account Management** hyperlink in the menu bar toward the top of the screen.

The **Account Management** screen will display as illustrated in Figure A 18.

Hyperlinks on this screen will allow users to access IACS registration, login functions, the Forgot Your User ID? functionality, and the IACS Community Administration Interface.

The bottom portion of the screen provides Help Resources with Help Desk contact information and email hyperlinks.

### Figure A 18: Account Management Screen

The figure displays the Account Management screen showing account management information and available hyperlinks.

The hyperlinks on the Account Management screen are:

New User Registration, which will allow you to register, request access to C M S computer applications, and, for primary security officials, enter relevant organizational and account information on the E D I Registration form.

My Profile, which will allow you to manage your IACS profile information.

Computer-Based Training (C B T) for Account Management, which will allow you to access online training for the IACS account management functions.

Forgot Your User I D?, which will allow you to retrieve your user I D if you were required to enter your date of birth during your IACS registration process.

A help resources section at the bottom of this screen contains information on and email hyperlinks to the various C M S helpdesks and help resources.

End of figure.

**Action:** Select the ***My Profile*** hyperlink.

The **Login to IACS** screen will display as illustrated in Figure A 19.

### Figure A 19: Login to IACS Screen

The figure displays the login to IACS screen displaying the User ID and Password fields, a login button, a Forgot Your Password? button and, at the top right of the screen, a help button.

The banner on the screen remains the same on all IACS screens and will contain the hyperlink to the health and human services website on the upper right of the screen.

Graphic arrows draw attention to the User ID and Password fields indicating that the user must complete those fields in order to login to IACS.

The forgot your password? Will bring the user to the password reset functionality, if he or she has forgotten their IACS password.

The help button will bring the user to help information for this screen.

End of figure.

**Action:** Enter your *User ID*

**Action:** Enter your *Password*.

**Action:** Select the *Login button*.

The **My Profile** screen will display as illustrated in Figure A 20.

#### **Figure A 20: My Profile Screen – Modify Account Profile Hyperlink**

The figure displays the My Profile screen for C M S applications users. The screen displayed is for a user who has previously registered and logged into IACS. It displays three hyperlink options:

Modify Account Profile – a hyperlink that brings the user to the modify account profile functionality.

Change Answers to Authentication Questions – a hyperlink that brings the user to the change answers to authentication questions functionality.

Change Password – a hyperlink that brings the user to the change password functionality.

In addition two logout navigation options appear; a logout button on the upper right of the screen next to the help button, and, a logout hyperlink on the lower left of the screen.

A graphic arrow indicates the modify account profile hyperlink which the help document will now explain.

End of figure.

**Action:** Select the *Modify Account Profile* hyperlink.

The **Modify Account Profile** screen will display. Selected *User Information* fields will be filled in with information you previously provided during the registration process, however, the information in these fields cannot be changed. Also, the SSN field is not displayed. Sample *User Information* fields in a **Modify Account Profile** screen are illustrated in Figure A 21.

In the **Access Request** portion of the **Modify Account Profile** screen a *Select Action* field and a **View My Access Profile** table display. Both are illustrated in Figure A 21: The **View My Access Profile** table contains the following information:

- **Community/Application: Role** – Displays your current applications or communities and your role within each application or community.

- **Profile Summary** – Displays a summary of your IACS account profile.
- **Possible Actions** – Displays a listing of possible actions you can take based on each of your approved roles.

**Note:** If you have a role in more than one application or community, each application or community will display in a separate row in the table.

**Figure A 21: MA/MA-PD/PDP/CC – Modify Account Profile Screen**

The figure displays the Modify Account Profile screen. Selected User Information fields will be filled in with information previously provided during the user's IACS registration. These fields are information only and the information in these fields cannot be changed. Also, the user's SSN field and number are not displayed.

In the Access Request portion of the Modify Account Profile screen, at the bottom of the screen, a Select Action field and a View My Access Profile table display.

The View My Access Profile table contains the following information:

Community/Application: Role – Displays your current applications or communities and your role within each application or community.

Profile Summary – Displays a summary of your IACS account profile.

Possible Actions – Displays a listing of possible actions that you can take based on each of your approved roles.

If you have a role in more than one application or community, each application or community will display in a separate row in the table.

The select action field displays the default action which is: View my access profile. The field has a drop down list with additional actions which will be illustrated later.

The screen has one navigation button at the bottom left, a cancel button.

End of figure.

The *Select Action* field provides a drop-down list of actions you can take when modifying your account profile. This list is illustrated in Figure A 22.

The *default* view is **View My Access Profile**, which allows you to view your existing IACS profile with all roles and provides a brief summary of entities specific to each role.

**Figure A 22: Modify Account Profile – Select Action Drop-down List**

The figure displays the *Select* action field from the previous screen with the drop down list displayed. The actions in this list are:

Modify Profile – which will contain the name of the user’s current application or user community.

Add application – which will bring the user to the add application screens.

Add community – which will bring the user to the add community screens.

View my access profile – which is the default view described in the previous figure.

These actions will be explained in detail in this help document.

End of figure.

In the *Select Action* field drop down list, you can select one of the following actions:

- **View My Access Profile** – This is the *default* view and it allows you to view your existing IACS profile with all roles and provides a brief summary of entities specific to each role. If this is the action you want to take, go to Section A 2.1.
- **Modify MA/MA-PD/PDP/CC Profile** – Allows you to modify your MA/MA-PD/PDP/CC profile. Select this action if you want to add or remove plans from your profile. If you add one or more plans, the request will have to be approved by the appropriate Plan Approver. Requests to delete one or more plans do not need to be approved. If this is the action you want to take, go to Section A 2.2.
- **Add Application** – Allows you to select an application to which you want to request access. You can only request access to one application at a time. Select this action if you want to request access to applications other than MA/MA-PD/PDP/CC. If this is the action you want to take, go to Section A 2.3.
- **Add Community** – Allows you to select a C M S Community to which you want to request access. You can only request access to one community role at a time. If this is the action you want to take, go to Section A 2.4.

**Action:** Select the *Action* you want to take.

Detailed explanations of each action are provided in the following subsections.

### **A 2.1 View My Access Profile**

With the **View My Access Profile** action selected, the screen will look similar to the example illustrated in Figure A 23. In the **Access Request** portion of the screen, a table showing your current applications and roles is displayed. All of the applications and or community roles for which you are approved to access are listed in this table.

There are no actions for you to take if you select **View My Access Profile**.

**Note:** This is the *default* view that appears when the Modify Account Profile screen first displays. If you then select the **View My Access Profile** action from the *Select Action* field, the screen will not change.

#### Figure A 23: View My Access Profile Table on Screen

The figure displays a close up view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the view my access profile, default, action selected in the select action field.

End of figure.

However, if you have recently submitted a Modify Account Profile update request and the request is still awaiting approval, a *Pending Requests* table will display immediately below the **Access Request** label and will contain all the requests you have submitted that are still awaiting approval. This table is illustrated in Figure A 24.

#### Figure A 24: Pending Requests Table on Screen

The figure displays a close up view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the view my access profile, default, action selected in the select action field.

However, in this view, the user has pending requests and the figure illustrates the pending requests table which will display above the select action field and show the user any pending request that were submitted and not yet processed by their approver or approvers.

End of figure.

### A 2.2 Modify MA/MA-PD/PDP/CC Profile

When you select the **Modify MA/MA-PD/PDP/CC Profile** action, the screen will refresh and display a screen similar to the one illustrated in Figure A 25.

- If your User Type is **MA/MA-PD/PDP/CC** and your Role is **MA Submitter** or **PDP Submitter**, the **Access Request** portion of the screen will appear as illustrated in the example in Figure A 25.
- If your Role is that of **MA Representative**, **PDP Representative**, or **Approver**, the screen that will appear will be similar to the one illustrated in Figure A 25 except that the *Role* field will display your specific role. Additionally, **only the Plan Contract fields will be available for you to modify**. These fields are the *Plan Contract Number* field for adding more contracts and the *Modify Plan Contacts* field for removing contracts.
- If your Role is that of **IUI Help Desk** or **IUI Administrator**, there are **no specifics for you to change** in Modify Profile for your role. You can, however, request access to roles in other applications.

### Figure A 25: User/Submitter – Modify MA/MA-PD/PDP/CC Profile Screen

The figure displays a view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the modify profile action selected in the select action field.

The view my access profile table is no longer displayed on screen.

For this role the screen displays the plan contract, PDE mailbox, and RAPS mailbox number fields each with the user's current contract numbers displaying in a field labeled: Existing Contracts and Selected Contract. To the right of each of these fields is a vertical selection of four navigation buttons; a right facing arrow button, a left facing arrow button, a double right facing arrow button and a double left facing arrow button.

To the right of these navigation buttons, is an empty field, labeled: Contracts to remove.

Below these fields is the justification for action field and a next navigation button.

End of figure.

#### A 2.2.1 Add Contracts

If you want to **Add a Contract Number** to your current list of contract numbers, do the following:

**Action:** Enter the contract number in the appropriate *Plan Contract Number, PDE Mailbox, or RAPS Mailbox* field.

**Action:** Select the applicable **Add** button.

If you want to add another contract number, repeat the above Actions.

## A 2.2.2 Remove Contracts

If you want to remove one or more contract numbers, do the following:

### Figure A 26: Modify MA/MA-PD/PDP/CC Profile Screen – Remove Contract Steps

The figure displays a view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the modify profile action selected in the select action field.

Graphic arrows indicate the steps a user needs to take to remove a contract from their profile. These are discussed in detail in the document.

End of figure.

**Action:** In the *Modify Contracts/Mailboxes* field areas, within the *Existing Contracts and Selected Contracts* area, select the contract number you want to remove.

**Action:** Select the box with the right facing arrow.

The system will move the selected contract number to the *Contracts to Remove* area to the right. If you change your mind, you can move the contract number back to the *Existing Contracts and Selected Contracts* area by selecting the box with the left facing arrow.

If you want to move all contract numbers in the *Existing Contracts and Selected Contracts* area to the *Contracts to Remove* area, select the box with the double right facing arrow.

If you change your mind, you can move all the contract numbers back to the *Existing Contracts and Selected Contracts* area by selecting the box with the double left facing arrow.

## A 2.2.3 Justification for Action

Once you have finished making your modifications, do the following:

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field. This field must include the reason you are requesting this action.

**Action:** Select the **Next** button when you are done entering your justification statement.

When you select the Next button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure A 27

#### **Figure A 27: Modify Request Confirmation Screen**

The figure displays the Modify Request Confirmation screen with a notice stating that the user has made changes to their profile and offering three navigation buttons at the bottom left of the screen. These are:

Submit

Edit

Cancel

The functions of each button are explained in this help document.

End of figure.

**Action:** Select the **Submit** button to submit your modification request.

- To return and edit your changes, select the **Edit** button.
- If you select the **Cancel** button, your request will be cancelled and any modifications you entered will be lost. A screen indicating this will be displayed. You must select the **Submit** button to confirm the action.

**Note:** Your modifications will not be completed unless the **Submit** button is selected.

When you select the **Submit** button, a **Modification Request Acknowledgement** screen will display as illustrated in Figure A 28. You must select the **OK** button to complete your account profile modification.

#### **Figure A 28: Modify Request Acknowledgement Screen**

The figure displays the Modification Request Acknowledgement screen which contains a message that indicates the user's request has been successfully submitted and provides a tracking number for the request.

The screen has one navigation button on the lower left, an OK button which, when selected completes the modify account profile process and returns the user to the My Profile screen.

End of figure.

The **Modify Request Acknowledgement** screen indicates your request has been successfully submitted and provides a tracking number for your request. **Record this tracking number** and use it if you have questions about the status of your request.

**Note:** You can print the information contained on the screen by selecting the **Print** icon.

**Action:** Select the **OK** button to complete the Modify Account Profile process.

The **Modify Request Acknowledgement** screen will close and the system will return you to the **My Profile** screen.

#### **A 2.2.4 After Account Profile Modification**

You will be sent an email confirming that IACS has received your request and providing you with a Request Number. You should use that request number if you contact your Help Desk regarding your request.

If an email notification is not received within 24 hours after you modify your profile, please contact your Help Desk.

Your approver will be notified of your pending request via email. You will be notified via email if your requested account profile modification is approved or denied.

#### **A 2.3 Add Application**

When you select the **Add Application** action, the screen will refresh and you will be presented with a screen similar to the one illustrated in Figure A 29. This action will allow you to request access to other C M S applications integrated with IACS.

In the **Access Request** portion of the screen, the **View My Access Profile** table showing your current applications and roles **is no longer displayed**.

A **new field is displayed** entitled *Select Application* along with the *Justification for Action* field.

**Figure A 29: Modify MA/MA-PD/PDP/CC Profile – Add Application**

The figure displays a close up view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the Add Application action selected in the select action field.

The view my access profile table is no longer displayed on screen.

A new field, the select application field with a drop down list, is displayed.

Below this field is the justification for action field.

The screen shows two navigation buttons, a next button and a cancel button, on the lower left of the screen.

End of figure.

The *Select Application* field has a drop-down list of the other C M S applications integrated with IACS as illustrated in Figure A 30.

**Note:** Your current application would not be listed because you may only have ***one role in an application.***

#### **Figure A 30: Add Application – Select Application Drop-down List**

The figure displays a close up view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the Add Application action selected in the select action field as described in the previous figure.

The drop down list, in the select application field, is displayed showing the current applications available to the user.

The remaining screen features remain the same.

End of figure.

**Action:** Select the desired ***Application*** from the drop down list.

Please refer to the procedures for requesting access to the various C M S applications, using the Modify Account Profile option, which are provided in the following IACS Help Document Attachments:

- **Attachment B – CBO/CSR** – Community Based Organization/Customer Service Representative

- **Attachment C – COB** – Coordination of Benefits – VDSA and COBA Organizations
- **Attachment D – HETS UI** – HIPAA Eligibility Transaction System User Interface

## **A 2.4 Add Community**

When you select the **Add Community** action, the screen will refresh and you will be presented with a screen similar to the one illustrated in Figure A 31. This action will allow you to request a role in a C M S User Community.

In the **Access Request** portion of the screen, the **View My Access Profile** table showing your current applications and roles **is no longer displayed**.

A **new field is displayed** entitled *Select Community* along with the *Justification for Action* field.

### **Figure A 31: Modify MA/MA-PD/PDP/CC Profile – Select Community**

The figure displays a close up view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the Add Community action selected in the select action field.

The view my access profile table is no longer displayed on screen.

A new field, the select community field with a drop down list, is displayed.

Below this field is the justification for action field.

The screen shows two navigation buttons, a next button and a cancel button, on the lower left of the screen.

End of figure.

The *Select Community* field has a drop-down list containing the available C M S user communities as illustrated in the example in Figure A 32.

### **Figure A 32: Add Community – Select Community Drop-down List**

The figure displays a close up view of the access request portion of the screen for a MA/MA-PD/PDP/CC user/submitter role with the Add Community action selected in the select action field as described in the previous figure.

The drop down list, in the select community field, is displayed showing the current user communities available to the user.

The other screen features remain the same.

End of figure.

**Action:** Select the desired ***Community*** from the drop-down list.

Please refer to the procedures for requesting access to the various C M S User Communities, using the Modify Account Profile option, which are provided in the following IACS help document attachments:

- **Attachment E – DMEPOS Community** – Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Competitive Bidding System (DBidS) Community
- **Attachment F – Provider/Supplier – Individual Practitioner**
- **Attachment G – Provider/Supplier and FI/Carrier/MAC Communities**

## A 3.0 Login to MA/MA-PD/PDP/CC Plans

Once you have been approved and provisioned in IACS, you will want to access the screens for the plans on which you will be working. When you login to IACS the system will verify your identity and authorize you to access the desired plan. You will then be presented with the opening screen for the plan you are accessing.

The following steps and screens show how to access your desired plans through IACS.

**Action:** Browse to <https://applications.CMS.hhs.gov> on the C M S website.

The **C M S Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure A 33.

### Figure A 33: C M S Applications Portal WARNING/REMINDER Screen

The figure displays the C M S Government Computer System Warning/Reminder screen which contains important user information.

Two navigation buttons are at the bottom of the screen; an Enter C M S Applications Portal button which will provide access the C M S Applications Portal and a Leave button which will bring the user to the C M S Website.

Additional hyperlinks on this screen are in the screen banner and a navigation bar at the top of the screen.

The screen banner hyperlink is a hyperlink to the Health and Human Services web site.

The top navigation bar has hyperlinks to various screens on the Centers for Medicare and Medicaid (C M S) web site. These hyperlinks are: a hyperlink to the C M S Applications Portal Home screen (this is the current screen), a hyperlink to the C M S web site Home Page, a hyperlink to the C M S web site F A Qs, a feedback hyperlink to the C M S feedback screen, a hyperlink to the C M S web site Help screen, an email hyperlink that enables the user to send this page to someone, and a print icon that will print the current page.

End of figure.

**Action:** Read the important information on this screen and indicate your agreement by selecting the **Enter C M S Applications Portal** button.

If you do not want to proceed any further and want to exit, select the **Leave** button.

The **C M S Application Portal Introduction** screen will display as illustrated in Figure A 34.

### Figure A 34: C M S Applications Portal Introduction Screen

The figure displays the C M S Applications Portal Introduction screen.

An additional navigation menu bar has been added to the top of the screen. The additional hyperlinks now available are:

Introduction, this is the current screen

Account Management, a hyperlink to registration and user management services required to access applications within C M S's Applications Portal

Plans, a hyperlink to Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans

Providers, a hyperlink to Providers that participate in the Medicare program such as Hospitals and Physicians

End of figure.

**Action:** Select the **Plans** hyperlink in the menu bar toward the top of the screen.

The screen will change to the **Plans** screen as illustrated in Figure A 35.

Hyperlinks on this screen will allow users to access available Plans and the Forgot Your User ID? functionality.

The bottom portion of the screen provides Help Resources with Help Desk contact information and email hyperlinks.

### **Figure A 35: Plans Screen**

The figure displays the Plans screen.

The current screen displays a message from C M S and three active hyperlinks which are:

Medicare Advantage & Part D Inquiry System (Marx Internet) for plans facing Marx UI

Forgot your User ID? to retrieve your IACS user id if you have entered your date of birth during your IACS registration. Otherwise you will have to contact your helpdesk for assistance.

Medicare Advantage & Part D Inquiry System

As additional plans are added, these hyperlinks will be updated.

At the bottom of the screen, a help resources section displays the MMA helpdesk contact information and email hyperlink.

End of figure.

**Action:** Select the *Medicare Advantage & Part-D Inquiry System* hyperlink.

The **Login to IACS** screen will display as illustrated in Figure A 36.

### Figure A 36: Login to IACS Screen

The figure displays the login to IACS screen displaying the User ID and Password fields, a login button, a Forgot Your Password? Button and, at the top right of the screen, a help button.

The banner on the screen remains the same on all IACS screens and will contain the hyperlink to the health and human services website on the upper right of the screen.

Graphic arrows draw attention to the User ID and Password field indicating that the user must complete those fields in order to login to IACS.

The forgot your password? Will bring the user to the password reset functionality, if he or she has forgotten their IACS password.

The help button will bring the user to help information for this screen.

End of figure.

**Action:** Enter your *User ID*

**Action:** Enter your *Password*.

**Action:** Select the *Login* button.

**Note:** If you have forgotten your IACS password, select the *Forgot Your Password?* button.

When you login with your IACS User ID and Password:

1. The IACS system will verify your identity
2. Notify your plan application software that you are authorized to access the application
3. The application will then open the first screen for you to begin work.

## End of Attachment A