



Individuals Authorized Access to the CMS Computer Services (IACS) User Guide

Attachment A

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

September 2008

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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

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 CMS 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.

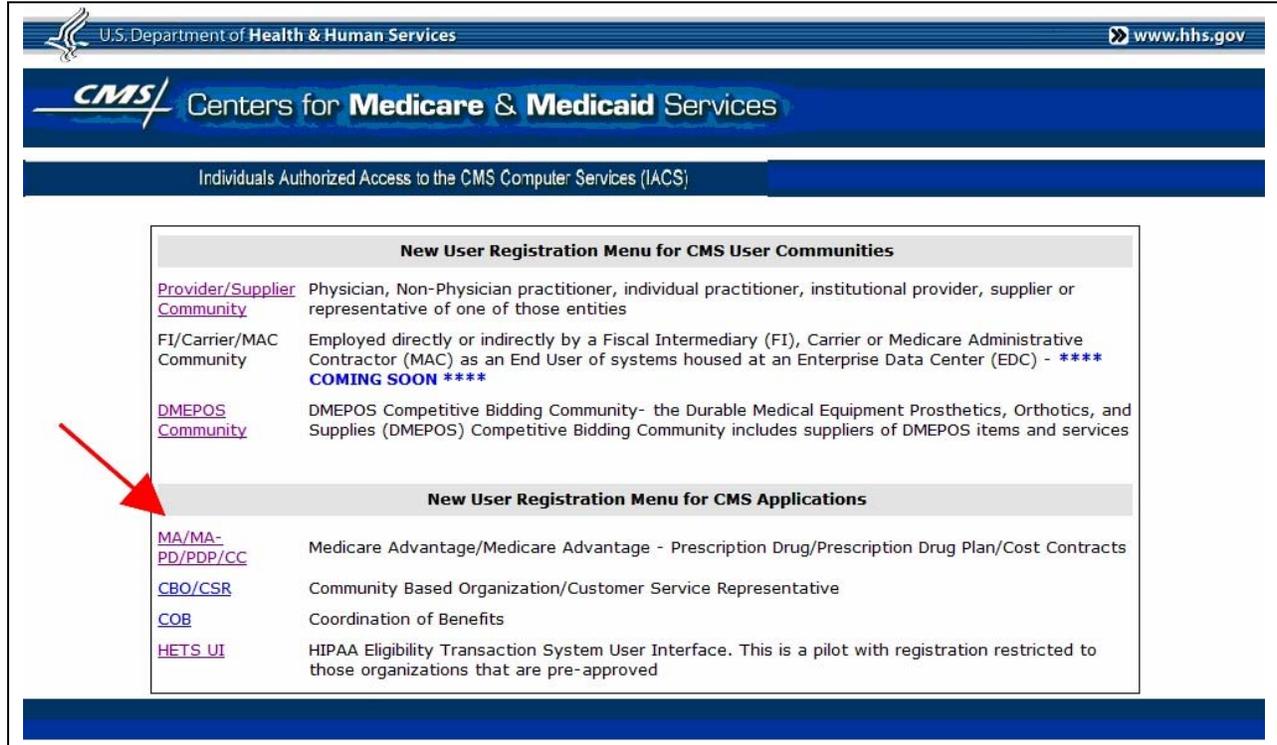


Figure A 1: New User Registration Menu Screen

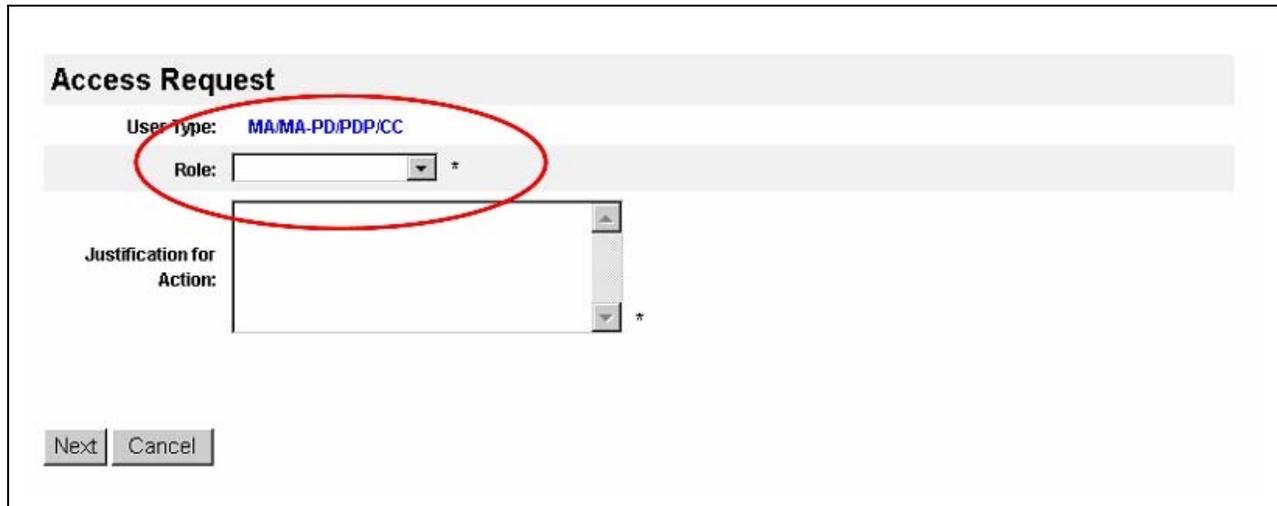
You then selected the hyperlink for the MA/MA-PD/PDP/CC application, as illustrated in Figure A 1, and the **New User Registration** screen opened.

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

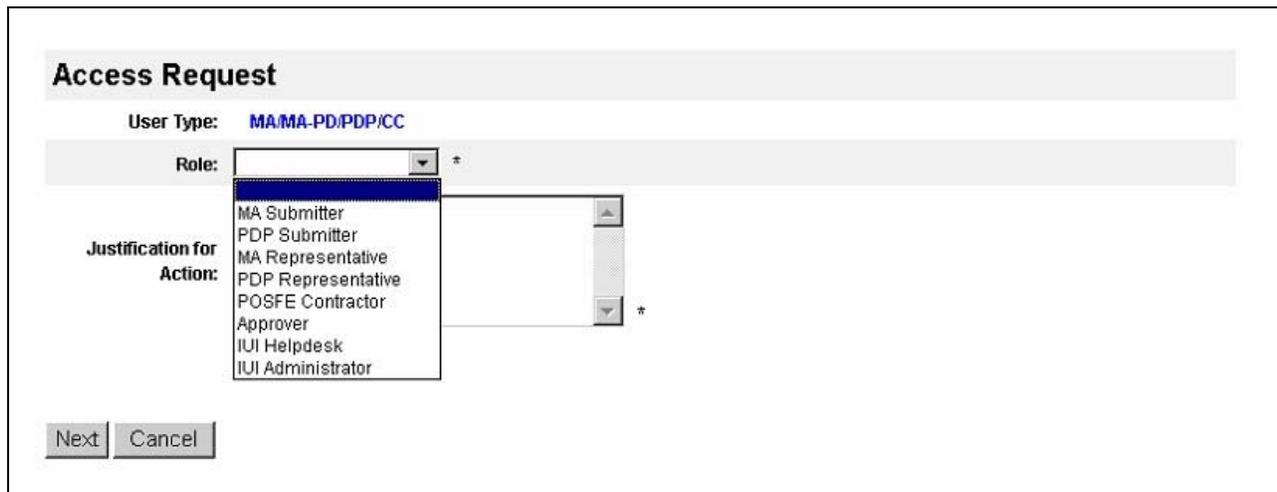
In the **Access Request** portion of the **New User Registration** screen, as illustrated in Figure A 2, the *User Type* field will be pre-populated with the MA/MA-PD/PDP/CC application selection you made on the **New User Registration Menu** screen. A *Role* field and *Justification for Action* field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



The screenshot shows the 'Access Request' form. At the top, the 'User Type' is pre-populated with 'MA/MA-PD/PDP/CC'. Below this, the 'Role' field is a dropdown menu with a red circle around it. The 'Justification for Action' field is a text area with a vertical scrollbar. At the bottom, there are 'Next' and 'Cancel' buttons.

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

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



The screenshot shows the 'Access Request' form with the 'Role' dropdown menu open. The dropdown list contains the following roles: MA Submitter, PDP Submitter, MA Representative, PDP Representative, POSFE Contractor, Approver, IUI Helpdesk, and IUI Administrator. The 'User Type' is still 'MA/MA-PD/PDP/CC'. The 'Justification for Action' field and 'Next/Cancel' buttons are also visible.

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

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.

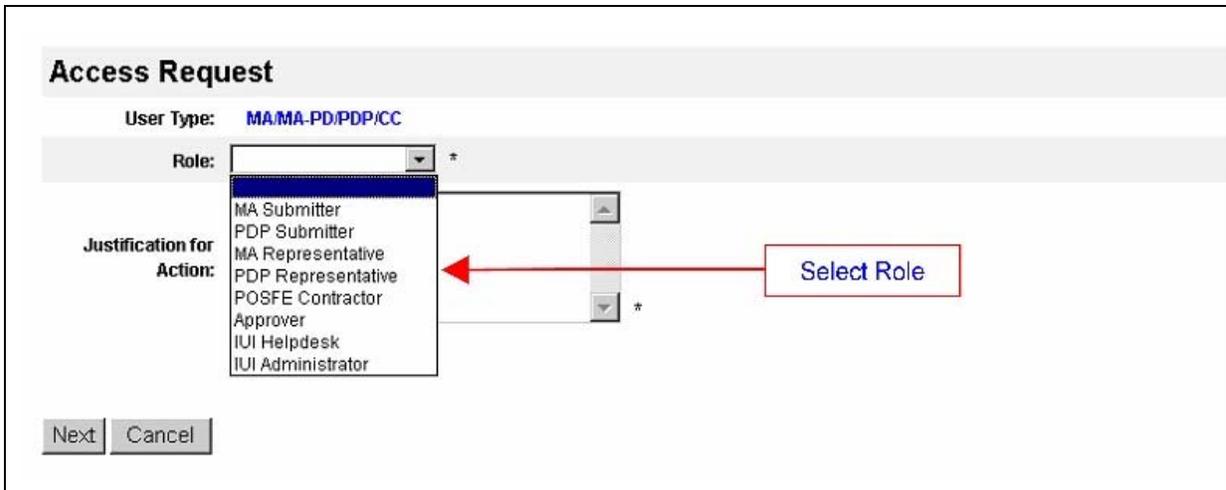


Figure A 4: MA/MA-PD/PDP/CC – Role Selection

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.

The screenshot shows the 'Access Request' form. At the top, the 'User Type' is set to 'MA/MA-PD/PDP/CC' and the 'Role' is 'MA Submitter'. A note states: 'For the User/Submitter Role, at least one Contract/Mailbox Number must be submitted.' Below this are three input fields: 'Plan Contract Number', 'PDE Mailbox Number', and 'RAPS Mailbox Number'. Each field has an 'Add' button and a placeholder 'Ex: Hxxxx or Sxxxx'. A red callout box on the right contains the text: 'Enter Contract Number' and 'Select Add after each number entry.' Red arrows point from this box to the 'Add' buttons of the three contract fields. Below these fields is a 'RACF ID' field and a 'Justification for Action' text area. At the bottom left are 'Next' and 'Cancel' buttons.

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

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.

Access Request

User Type: MA/MA-PD/PDP/CC

Role: MA Submitter *

For the User/Submitter Role, at least one Contract/Mailbox Number must be submitted. *

Plan Contract Number: Add Ex: Hxxxx or Sxxxx

PDE Mailbox Number: Add Ex: Hxxxx or Sxxxx

RAPS Mailbox Number: Add Ex: Hxxxx or Sxxxx

Contract(s): H1050

PDE Contract(s): H1051

RAPS Contract(s): H1052

RACF ID:

Justification for Action:

Next Cancel

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

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 CMS System Users: If you have already been assigned a RACF ID to access CMS 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.

Access Request

User Type: MA/MA-PD/PDP/CC

Role: MA Submitter *

For the User/Submitter Role, at least one Contract/Mailbox Number must be submitted. *

Plan Contract Number: Add Ex: Hxxxx or Sxxxx

PDE Mailbox Number: Add Ex: Hxxxx or Sxxxx

RAPS Mailbox Number: Add Ex: Hxxxx or Sxxxx

Contract(s): H1050

PDE Contract(s): H1051

RAPS Contract(s): H1052

RACF ID:

Justification for Action: *

Next **Cancel**

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

- 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,

The screenshot shows the 'Access Request' form with the following fields and elements:

- User Type:** MA/MA-PD/PDP/CC
- Role:** MA Representative *
- Plan Contract Number:** [Text Input] **Add** Ex: Hxxxx or Sxxxx
- RACF ID:** [Text Input]
- Justification for Action:** [Text Area]
- Buttons:** Next, Cancel
- Footer:** 0938-0989

A red box highlights the 'Add' button and the text 'Enter Contract Number and Select Add after each number entry.' A red arrow points from this box to the 'Add' button.

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

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.

Access Request

User Type: MA/MA-PD/PDP/CC

Role: MA Representative *

Please enter one contract at a time and click 'Add'

Plan Contract Number: Add Ex: Hxxx or Sxxx

Contract(s): H1050

RACF ID:

Justification for Action:

Next Cancel

OMB: 0938-0989

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

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 CMS System Users: If you have already been assigned a RACF ID to access CMS 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.

Access Request

User Type: MA/MA-PD/PDP/CC

Role: MA Representative *

Please enter one contract at a time and click 'Add'

Plan Contract Number: Add Ex: Hxxx or Sxxx

Contract(s): H1050

RACF ID:

Justification for Action: *

Next Cancel

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

- 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 CMS System Users: If you have already been assigned a RACF ID to access CMS 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.

The screenshot shows a web form titled "Access Request". At the top, there is a "User Type" field with a dropdown menu set to "MA/MA-PD/PDP/CC". Below that is a "Role" dropdown menu set to "POSFE Contractor" with a red asterisk to its right. Underneath is a "RACF ID" text input field. The largest field is "Justification for Action", which is a multi-line text area with a vertical scrollbar on the right and a red asterisk to its right. At the bottom left of the form are two buttons: "Next" and "Cancel".

Figure A 11: POSFE Contractor – Data Input Fields

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.

The screenshot shows the 'Access Request' form for an Approver role. The form includes the following elements:

- Access Request** (Section Header)
- User Type:** MAMA-PD/PDP/CC
- Role:** Approver (dropdown menu)
- Plan Contract Number:** Input field with an **Add** button and an example: *Ex. Hxxxx or Sxxxx*
- Justification for Action:** Text area
- Buttons:** Next, Cancel

A red box highlights the **Add** button with the text: **Enter Contract Number**
Select Add after each number entry. A red arrow points from this box to the **Add** button.

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

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.

Access Request

User Type: **MAMA-PD/PDP/CC**

Role: **Approver** *

Please enter one contract at a time and click **'Add'**

Plan Contract Number: **Add** Ex: Hxxxx or Sxxxx

Justification for Action: *

Next **Cancel**

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

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.

The screenshot shows a web form titled "Access Request". At the top, there is a "User Type" field with a dropdown menu set to "MA/MA-PD/PDP/CC". Below that is a "Role" dropdown menu set to "IUI Helpdesk", with a red asterisk to its right. Underneath is a "RACF ID" text input field. Below the RACF ID field is a "Justification for Action" text area with a vertical scrollbar and a red asterisk to its right. At the bottom left of the form are two buttons: "Next" and "Cancel".

Figure A 14: IUI Help Desk – Data Input Fields

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 CMS System Users: If you have already been assigned a RACF ID to access CMS 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.

The screenshot shows a web form titled "Access Request". At the top, there is a "User Type" field with a dropdown menu showing "MA/MA-PD/PDP/CC". Below that is a "Role" dropdown menu with "IUI Administrator" selected and a red asterisk to its right. Underneath is a "RACF ID" text input field. The largest field is "Justification for Action", which is a multi-line text area with a vertical scrollbar on the right and a red asterisk to its right. At the bottom left of the form are two buttons: "Next" and "Cancel".

Figure A 15: IUI Administrator – Data Input Fields

- 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 CMS System Users: If you have already been assigned a RACF ID to access CMS 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 CMS 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 CMS website.

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

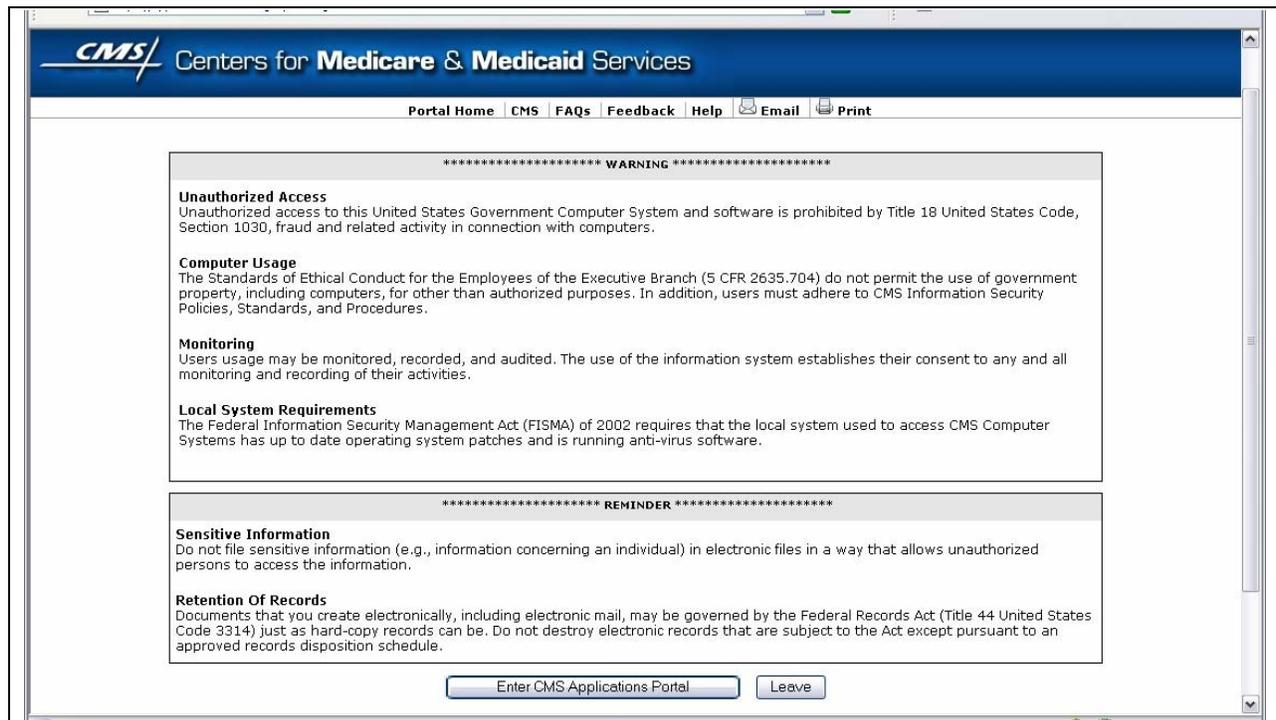


Figure A 16: CMS Applications Portal WARNING/REMINDER Screen

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

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

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure A 17.

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CMS Centers for **Medicare & Medicaid** Services

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CMS Applications Portal Introduction

The CMS Applications Portal is property of the Centers for Medicare & Medicaid Services (CMS). CMS is a Federal agency within the U.S. Department of Health and Human Services. To learn more about CMS, visit the [CMS Website](#).

The CMS Applications Portal is a gateway being offered to our Business Partners to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs. This portal is in its initial implementation stage with new capabilities being added on a regular basis.

To use the CMS Portal you must first register and then choose a role:

- **Account Management** - Registration and user management services required to access applications within CMS' Applications Portal
- **Plans** - Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
- **Providers** - Providers that participate in the Medicare program such as Hospitals and Physicians
- **Data Services** - Data Services for internal CMS users

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 Centers for Medicare & Medicaid Services, 7500 Security Boulevard Baltimore, MD 21244

Figure A 17: CMS Applications Portal Introduction Screen

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.

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CMS Centers for Medicare & Medicaid Services

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Account Management

CMS has established a single system to provide user registration and user account self-service capabilities. The links below will launch the registration application for new users to request access to the applications offered within the CMS Applications Portal and the self-service application for registered users.

- » [New User Registration](#) - Apply for a CMS computer services account
- » [My Profile](#) - Manage your CMS computer services account
- » [Computer Based Training \(CBT\) For Account Management](#)
- » [Forgot Your User ID?](#)
- » [IACS Community Administration Interface](#) - For assisted user accounts management functions

Help Resources

- Provider Community users should direct questions or concerns to the External User Services (EUS) Help Desk at 1-866-484-8049, TTY/TDD at 1-866-523-4759 (Monday - Friday 7am-7pm EST) or via email at EUSsupport@cgi.com
- Medicare providers participating in the HETS UI pilot should direct questions to the MCARE help desk at 1-866-440-3805 (phone), 1-615-238-0822 (fax) or via email mcare@cms.hhs.gov
- Participants in the Post Acute Care Payment Reform Demonstration may direct questions and concerns related to the CARE application and the PAC-PRD demonstration to the RTI helpdesk by emailing help@pacdemo.rti.org or by calling 1-866-412-1510.
- Health Plans should direct questions or concerns to MMAHelp desk at 1-800-927-8069 or via email at mmahelp@cms.hhs.gov
- Suppliers for the Competitive Bidding Program should direct questions or concerns to the Competitive Bidding Implementation Contractor at 1-877-577-5331 (Phone) or via e-mail CBIC_admin@palmettogba.com

Figure A 18: Account Management Screen

Action: Select the *My Profile* hyperlink.

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

U.S. Department of Health & Human Services www.hhs.gov

CMS Centers for **Medicare & Medicaid** Services [HELP](#)

Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

Password

[Login](#) [Forgot Your Password?](#)

Figure A 19: Login to IACS Screen

- 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.

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CMS Centers for **Medicare & Medicaid** Services [LOGOUT](#) [HELP](#)

Individuals Authorized Access to the CMS Computer Services (IACS)

My Profile

Welcome, **DBER937**. Please select one of these options:

- >> [Modify Account Profile](#)
- >> [Change Answers to Authentication Questions](#)
- >> [Change Password](#)

[Logout](#) Logged in as: DBER937

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

- 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.

The screenshot displays the 'Modify Account Profile' interface. The 'User Information' section includes fields for User ID (DBER937), First Name (Malva), MI, Last Name (Thyme), RACF ID (UVJL), E-mail Address (mthyme@network.net), Office Telephone (410-919-5455), Company Name (Beech Associates), Company Telephone (410-919-5588), Address 1 (1279 N. Wilson), Address 2, City (Paint), State/Territory (MD), and Zip Code (57910). The 'Access Request' section features a 'Select Action' dropdown menu currently set to 'View My Access Profile'. A table titled 'View My Access Profile' is highlighted with a red oval, containing the following data:

Community/Application : Role	Profile Summary	Possible Actions
MA/MA-PD/PDP/CC : User/Submitter	Contract(s): Plan H0151	As a Submitter: ○ Add/Remove Plan/PDE/RAPS contracts

A 'Cancel' button is located at the bottom left of the form.

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

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

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 CMS 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

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.

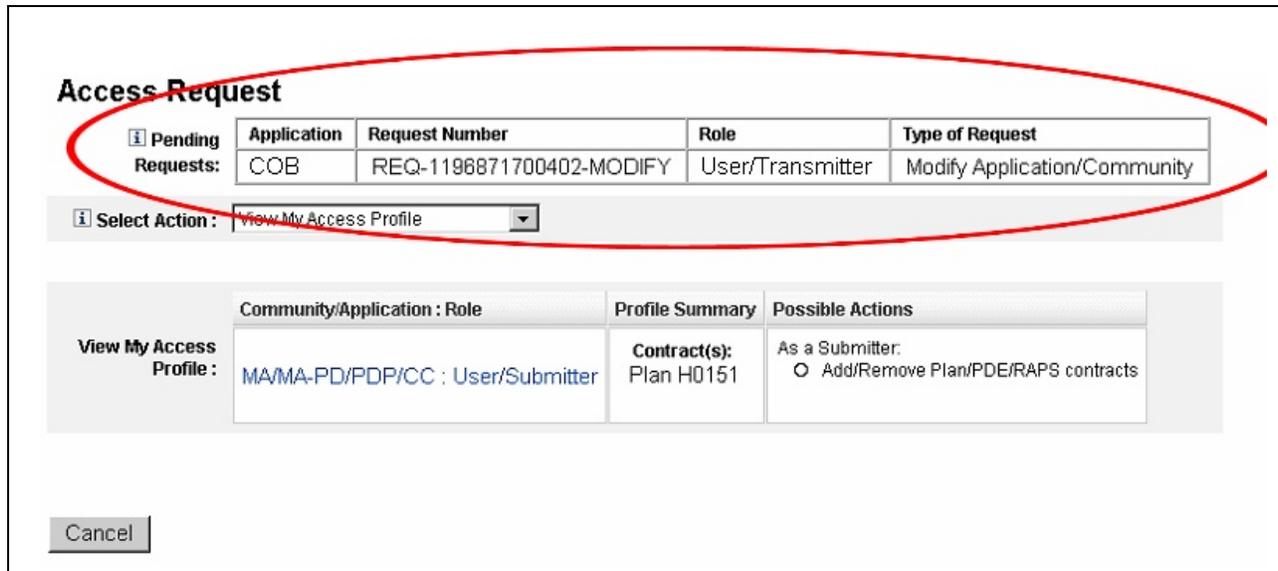


Figure A 24: Pending Requests Table on Screen

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.

Access Request

Select Action: Modify Profile: MA/MA-PD/PDP/CC

User Type: MA/MA-PD/PDP/CC

Role: User/Submitter

Plan Contract Number: Add

PDE Mailbox Number: Add

RAPS Mailbox Number: Add

Modify Plan Contracts:

Existing Contracts and Selected Contract	Contracts to Remove
H0150 H0151 S5775	
> < >> <<	

Modify PDE Mailboxes:

Existing Contracts and Selected Contract	Contracts to Remove
H0151 S5775	
> < >> <<	

Modify RAPS Mailboxes:

Existing Contracts and Selected Contract	Contracts to Remove
H0150 H0151 S5775	
> < >> <<	

Justification for:

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

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:

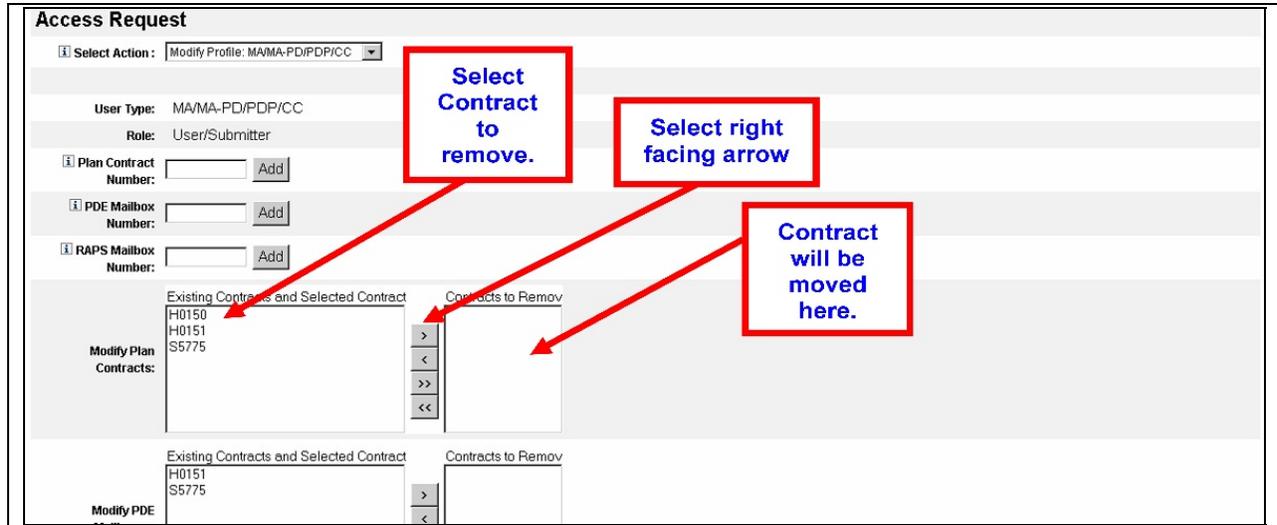


Figure A 26: Modify MA/MA-PD/PDP/CC Profile Screen – Remove Contract Steps

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

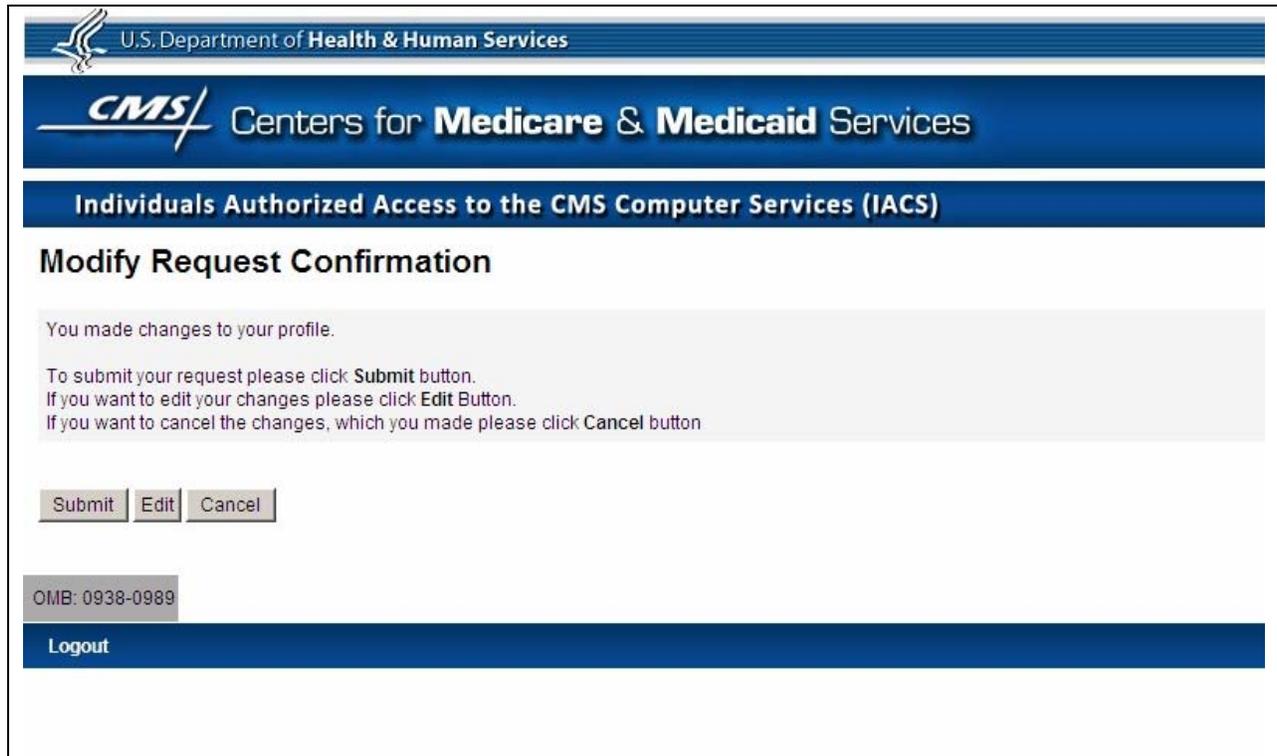


Figure A 27: Modify Request Confirmation Screen

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.

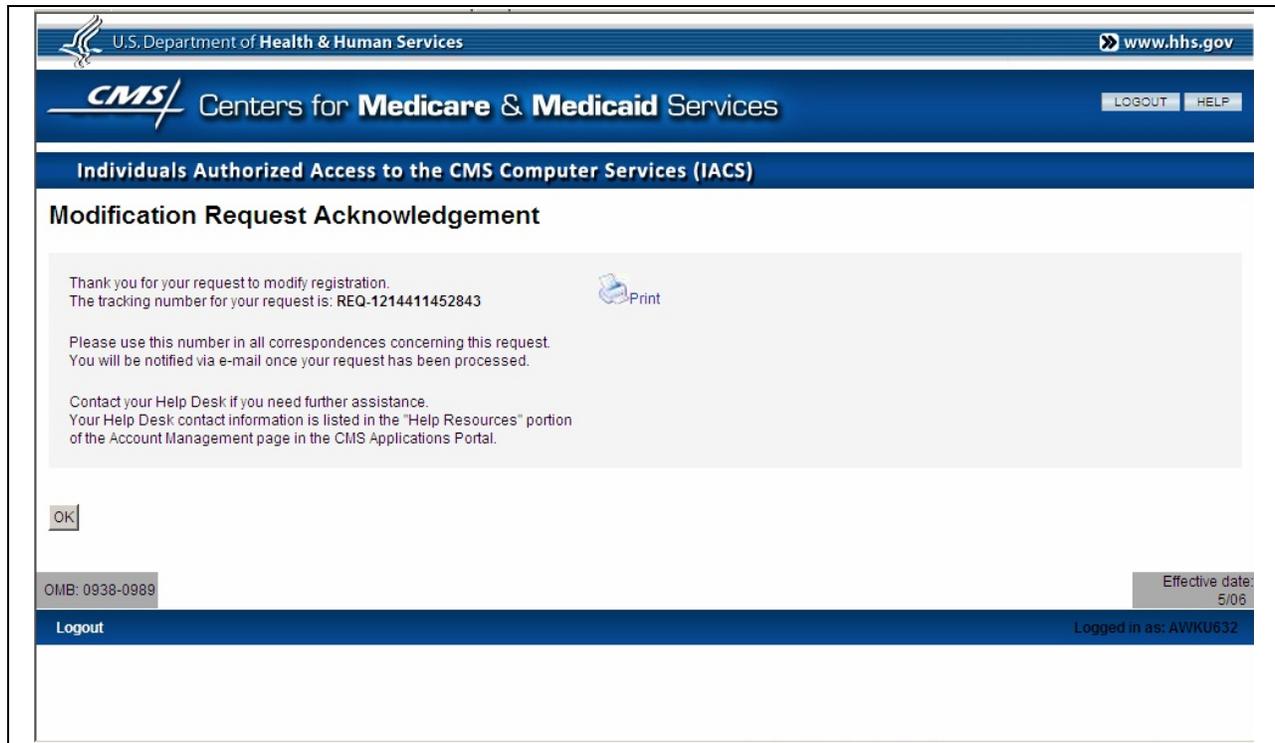


Figure A 28: Modify Request Acknowledgement Screen

The **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 CMS 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.

The screenshot shows a web form titled "Access Request". At the top, there is a label "Select Action:" followed by a dropdown menu currently showing "Add Application". Below this is another label "Select Application:" followed by a dropdown menu showing "Select Application" and an asterisk. The third field is labeled "Justification for Action:" and contains a large, empty text area with a vertical scrollbar on the right side, also marked with an asterisk. At the bottom left of the form, there are two buttons: "Next" and "Cancel".

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

The *Select Application* field has a drop-down list of the other CMS 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**.

The screenshot shows a web form titled "Access Request". At the top, there is a "Select Action:" dropdown menu with "Add Application" selected. Below this is a "Select Application:" dropdown menu with a list of application names: "Select Application", "MA/MA-PD/PDP/CC", "CBO/CSR", "COB", and "HETS UI". The "Select Application" option is currently selected and highlighted. To the right of the dropdown is a vertical scrollbar. Below the dropdown is a "Justification for Action:" text input field. At the bottom left of the form are "Next" and "Cancel" buttons.

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

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

Please refer to the procedures for requesting access to the various CMS 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 CMS 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.

The screenshot shows a web form titled "Access Request". It contains three main sections: 1. "Select Action:" with a dropdown menu currently set to "Add Community". 2. "Select Community:" with a dropdown menu currently set to "Select Community" and an asterisk to its right. 3. "Justification for Action:" with a large text area and a vertical scrollbar, also marked with an asterisk. At the bottom left, there are two buttons: "Next" and "Cancel".

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

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

This screenshot is similar to Figure A 31 but shows the "Select Community" dropdown menu open. The menu lists three options: "Select Community" (highlighted in blue), "Provider/Supplier", and "FI/Carrier/MAC". The rest of the form, including the "Justification for Action" field and the "Next/Cancel" buttons, remains the same as in Figure A 31.

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

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

Please refer to the procedures for requesting access to the various CMS 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 CMS website.

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

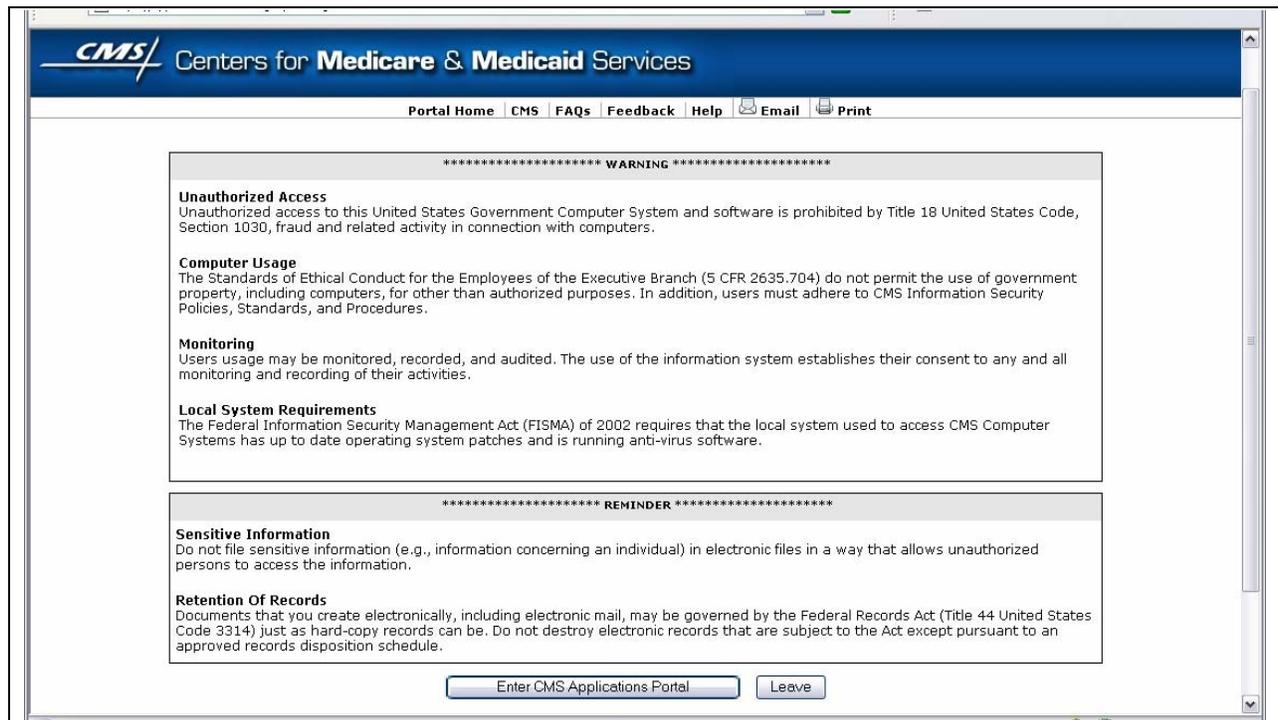


Figure A 33: CMS Applications Portal WARNING/REMINDER Screen

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

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

The **CMS Application Portal Introduction** screen will display as illustrated in Figure A 34.

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CMS Applications Portal Introduction

The CMS Applications Portal is property of the Centers for Medicare & Medicaid Services (CMS). CMS is a Federal agency within the U.S. Department of Health and Human Services. To learn more about CMS, visit the [CMS Website](#).

The CMS Applications Portal is a gateway being offered to our Business Partners to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs. This portal is in its initial implementation stage with new capabilities being added on a regular basis.

To use the CMS Portal you must first register and then choose a role:

- **Account Management** - Registration and user management services required to access applications within CMS' Applications Portal
- **Plans** - Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
- **Providers** - Providers that participate in the Medicare program such as Hospitals and Physicians
- **Data Services** - Data Services for internal CMS users

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Centers for Medicare & Medicaid Services, 7500 Security Boulevard Baltimore, MD 21244

Figure A 34: CMS Applications Portal Introduction Screen

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.

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Plans

CMS continues to work toward streamlining and improving Plan user access to beneficiary data required to administer MMA contracts. CMS is implementing new screens that combine the information that Plans previously accessed using the separate MARx and MBD User Interfaces. As a result, Plans will access a single user interface to obtain a consistent view of beneficiary eligibility and enrollment data.

The following applications are available to Health Plans participating in the Medicare program:

- » [Medicare Advantage & Part-D Inquiry System \[MARx - Internet\]](#) - Plans facing MARx UI
- » [Forgot Your User ID?](#) - Retrieve Your User ID
- » [Medicare Advantage & Part-D Inquiry System \(MAPDOIS\)](#)

The MAPDOIS is a beta system. Plans are strongly cautioned to not use any data displayed in the MAPDOIS for daily processing activities, as the system is not in live mode. Until otherwise notified by CMS, Plans should continue to use the Common UI.

Help Resources

Please direct questions or concerns to the MMAHelp Desk at 1-800-927-8069 or via email to mmahelp@cms.hhs.gov.

[Department of Health & Human Services](#) | [Medicare.gov](#) | [Firstgov.gov](#)
[Email Updates](#) | [Privacy Policy](#) | [Freedom of Information Act](#)
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Figure A 35: Plans Screen

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

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

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Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

Password

[Login](#) [Forgot Your Password?](#)

Figure A 36: Login to IACS Screen

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