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

Attachment B – CBO/CSR

Community Based Organization/Customer Service Representative

July 2008

CONTENTS

FIGURES

Important Note

The ***IACS User Guide Main Body*** contains information about, and instructions on how to complete procedures, *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 Community Based Organization/Customer Service Representative (CBO/CSR).
2. Modify your account profile.

B 1.0 CBO/CSR Access Request Fields

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 B 1.

You then selected the hyperlink for the CBO/CSR application 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 CBO/CSR application.

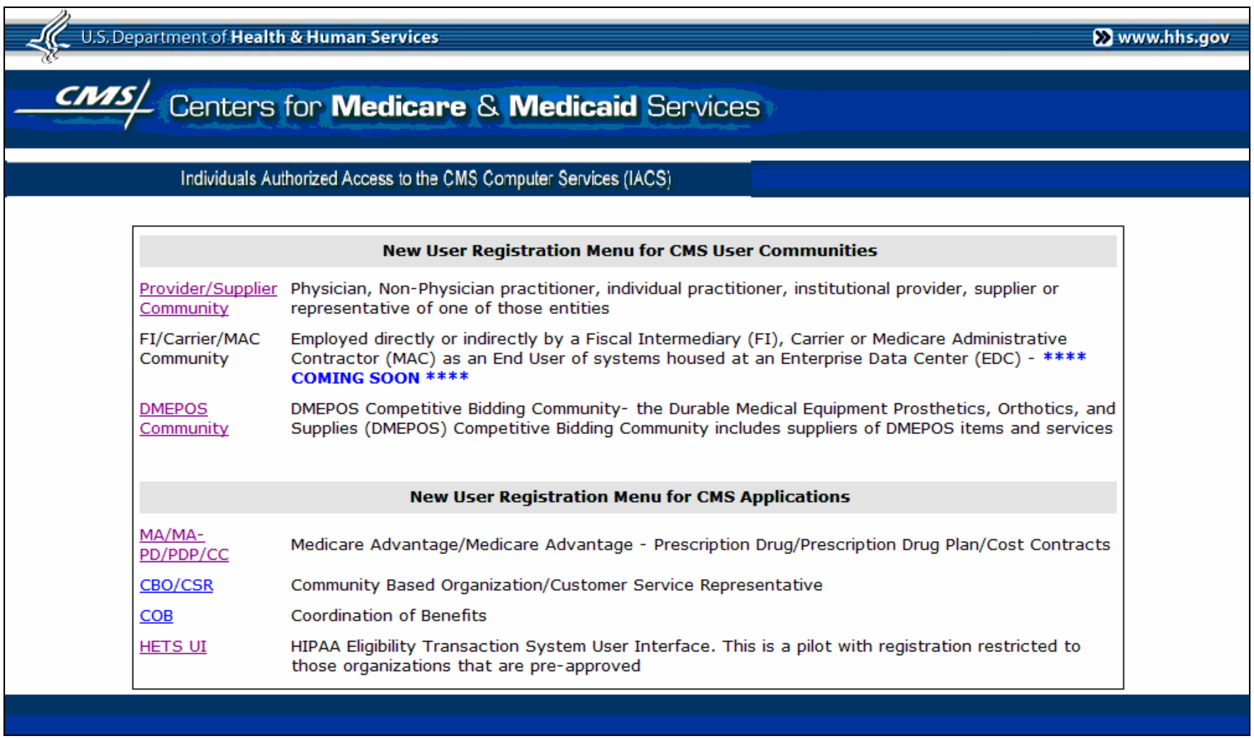

Figure B 1: New User Registration Menu for CMS Applications Screen

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

Figure B 2: CBO/CSR User Type Displayed

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

The *Call Center* field contains a drop-down list of available Call Centers as illustrated in Figure B 4.

You may select one of the following roles for the CBO/CSR application:

- **User** – This role will be able to perform CBO/CSR functions for selected call centers.
- **Approver** – This role will be able to approve Users for the CBO/CSR application

You may select one or more of the available Call Centers you require.

B 1.1 CBO/CSR - User

To register in IACS as a CBO/CSR **User** you must select the user role from the drop-down list in the *Role* field as illustrated in Figure B 3.

Figure B 3: CBO/CSR Role Selection

Action: Select the ***User*** role from the *Role* field drop-down list**.**

You must then select your desired Call Centers from the *Call Center* field drop-down list as illustrated in Figure B 4.

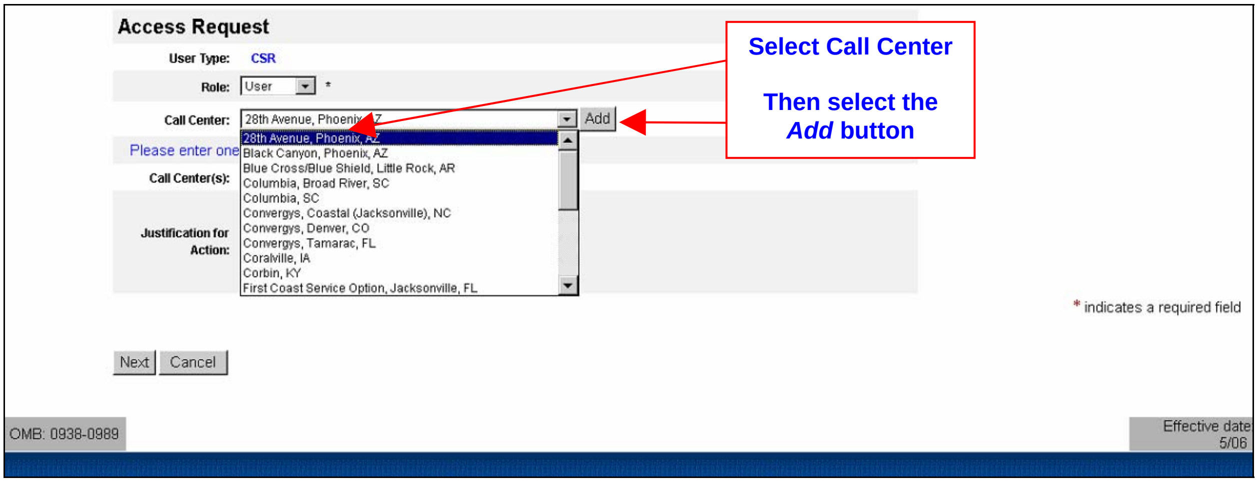

Figure B 4: CBO/CSR User – Call Center Selection

Action: Select a ***Call Center*** from the *Call Center* field drop-down list.

Action: Select the ***Add*** button to the right of the *Call Center* field.

The screen will refresh and display the selected Call Center above the *Justification for Action* field as illustrated in Figure B 5.

Note: If you require additional Call Centers, continue making selections from the *Call Center* field drop-down list, one at a time, until you have made all the necessary selections.

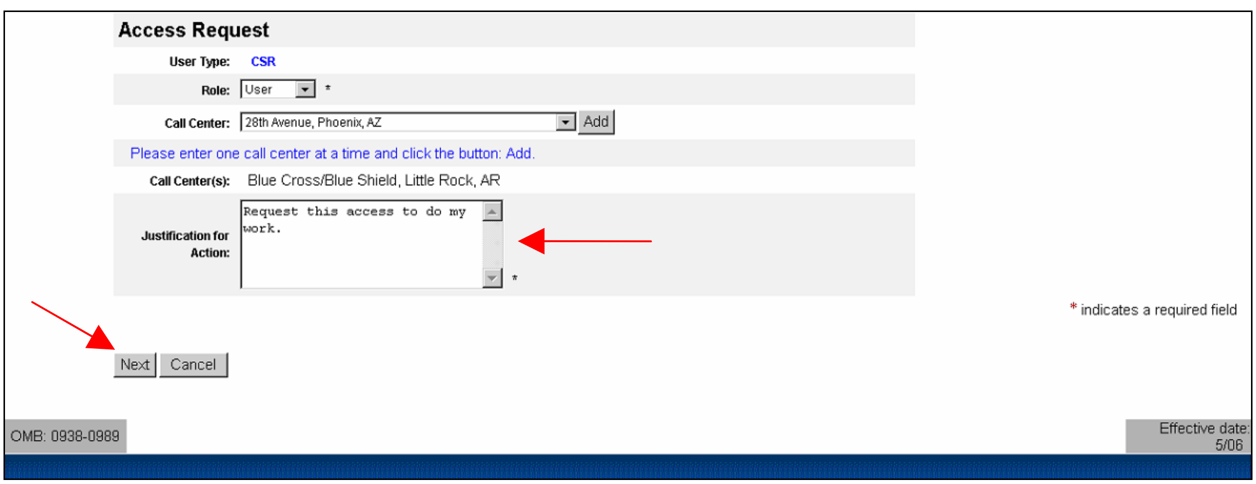

Figure B 5: CBO/CSR User – Justification for Action Field

Action: Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure B 5. 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 of data that needs to be corrected or required fields that still need to be filled.

When the data in all fields are 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.

B 1.2 CBO/CSR Approver

To register in IACS as a CBO/CSR **Approver** you must select the Approver role from the drop-down list in the *Role* field as illustrated in Figure B 6.

Figure B 6: CBO/CSR Role Selection

Action: Select the ***Approver*** role from the *Role* field drop-down list**.**

You must then select your desired Call Centers from the *Call Center* field drop-down list as illustrated in Figure B 7.

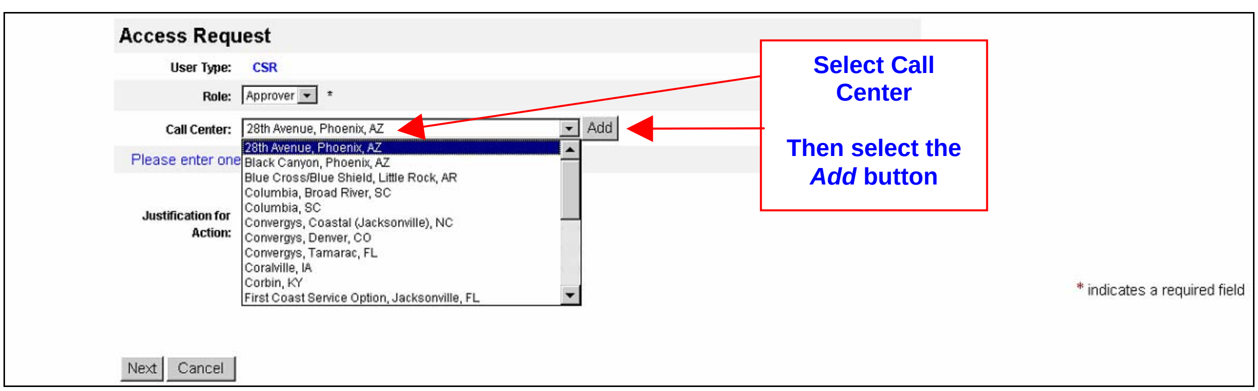

Figure B 7: CBO/CSR Approver – Call Center Selection

Action: Select a ***Call Center*** from the *Call Center* field drop-down list.

Action: Select the ***Add*** button to the right of the *Call Center* field.

The screen will refresh and display the selected Call Center above the *Justification for Action* field as illustrated in Figure B 8.

Note: If you require additional Call Centers, continue making selections from *Call Center* field drop-down list, one at a time, until you have made all the necessary selections.

Figure B 8: CBO/CSR Approver – Justification for Action Field

Action: Enter a brief justification statement for your request in the *Justification for Action* field as illustrated in Figure B 8. 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 of data that needs to be corrected or required fields that still need to be filled in.

When the data in all fields are 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.

B 2.0 Modify Account Profile

You may need to modify your IACS account profile to add call centers to the list of those to which you already have access, to delete call centers to which you no longer need access, or request a role in another IACS integrated CMS Application or CMS User Community.

The following steps and screens show you 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 B 9.

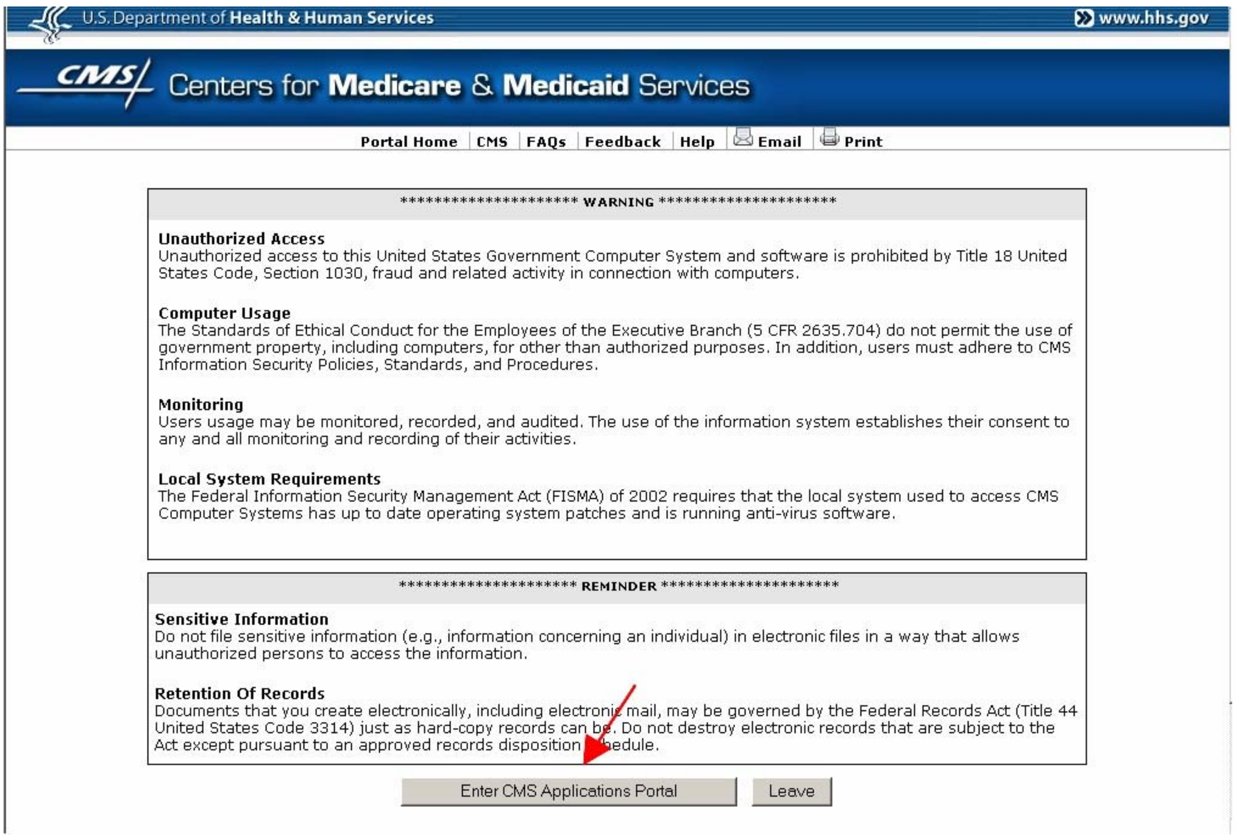

Figure B 9: CMS Applications Portal WARNING/REMINDER Screen

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 B 10.

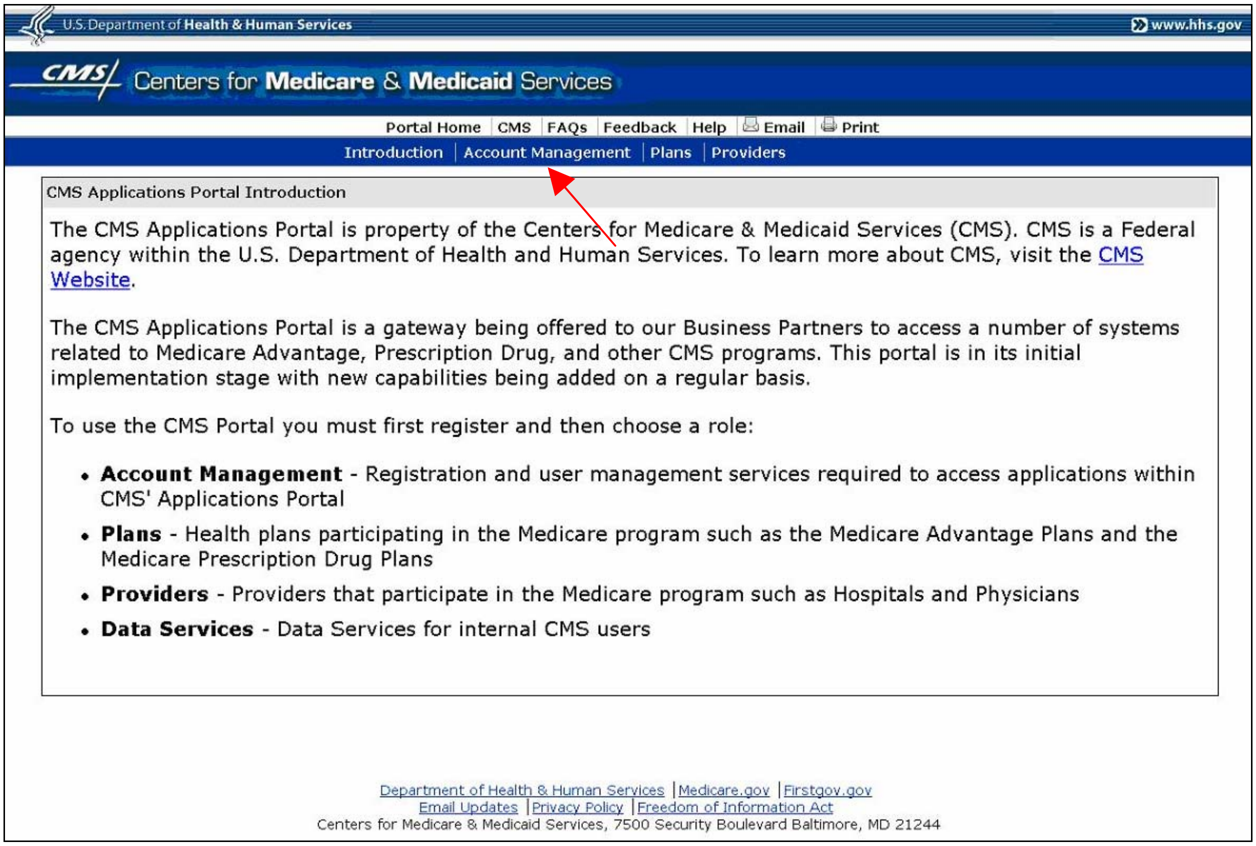

Figure B 10: CMS Applications Portal Introduction Screen

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

The **Account Management** screen will display as illustrated in Figure B 11.

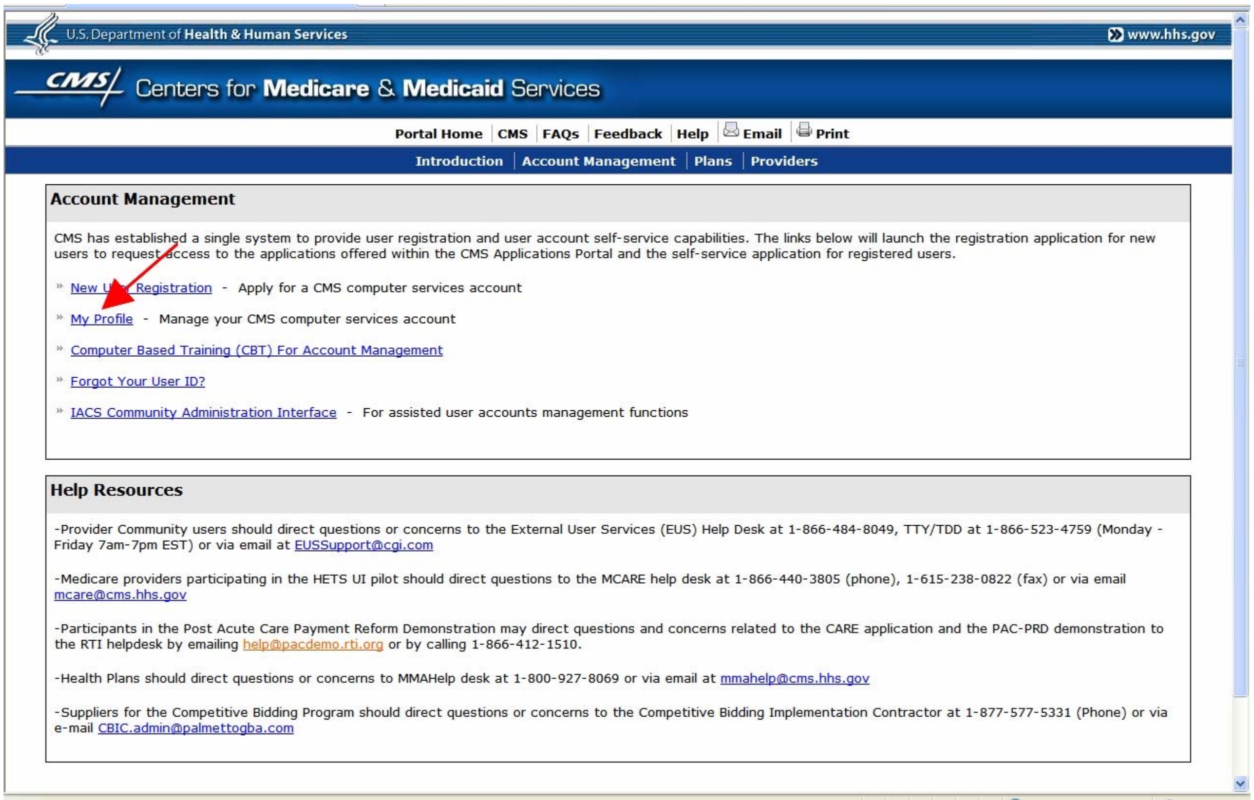

Figure B 11: Account Management Screen

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

The **Login to IACS** screen will display as illustrated in Figure B 12**.**

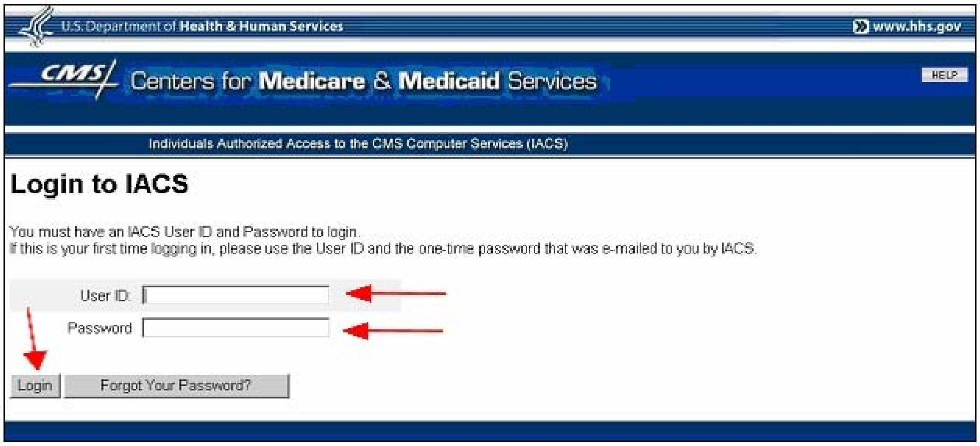

Figure B 12: Login to IACS Screen

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

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

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

The **My Profile** screen will display as illustrated in Figure B 13.

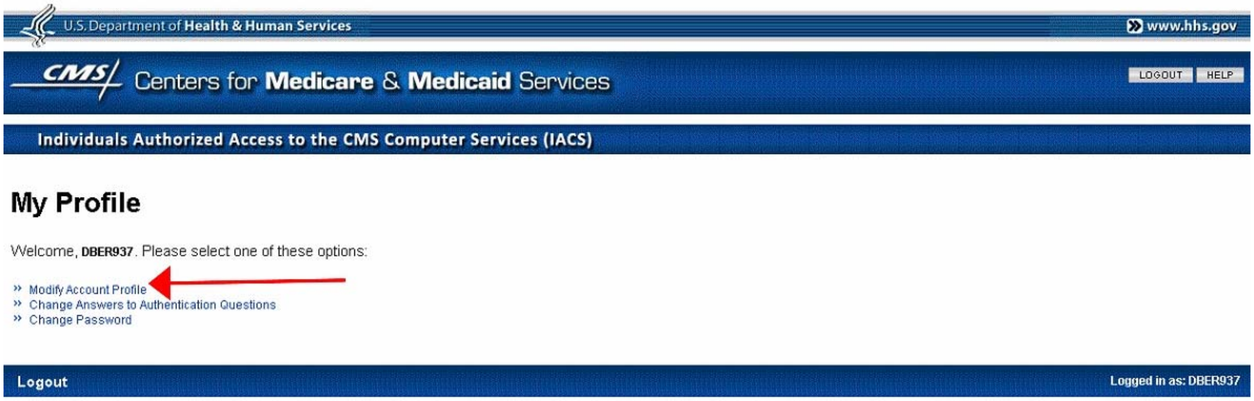

Figure B 13: My Profile – Modify Account Profile Option

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 B 14.

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 B 14: 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.

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.

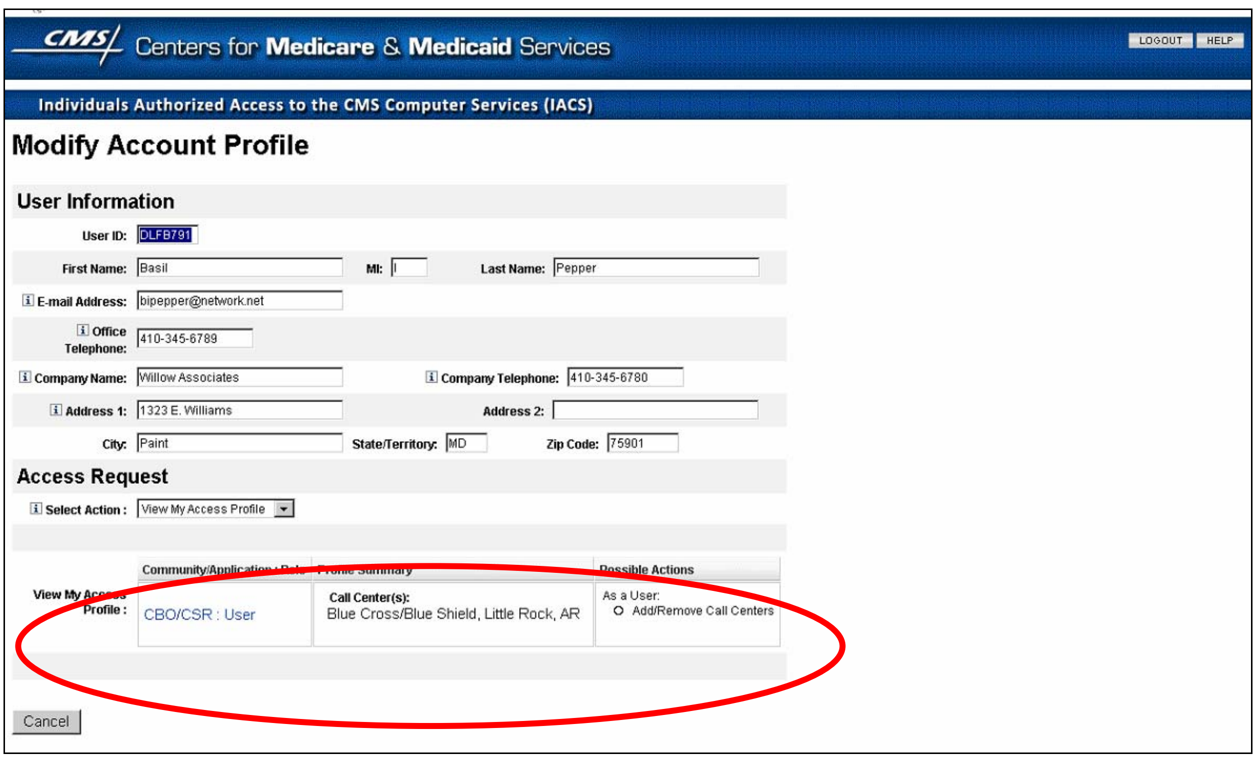

Figure B 14. Example of CBO/CSR Modify Account Profile Screen

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 B 15.

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.

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 B 2.4.
- **Modify CBO/CSR Profile –** Allows you to modify your CBO/CSR profile. Select this action if you want to add or remove Call Centers from your profile. If you add one or more Call Centers, the request will have to be approved by the appropriate CBO/CSR Approver. Requests to delete one or more Call Centers do not need to be approved. If this is the action you want to take, go to Section B 2.1.
- **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 CBO/CSR. If this is the action you want to take, go to Section B 2.2.
- **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 B 2.3.

Figure B 15: Modify Account Profile – Select Action Drop-Down List

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

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

B 2.1 Modify CBO/CSR Profile:

When you select the action of **Modify CBO/CSR Profile**, the screen will refresh and display a screen similar to the one illustrated in Figure B 16.

- If your Role is that of **User**, the ***Access Request*** portion of the screen will appear as illustrated in the example in Figure B 16.
- If your Role is that of **Approver,** the screen that will appear will be similar to the one illustrated in Figure B 16, except that the *Role* field will have your specific role displaying.

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

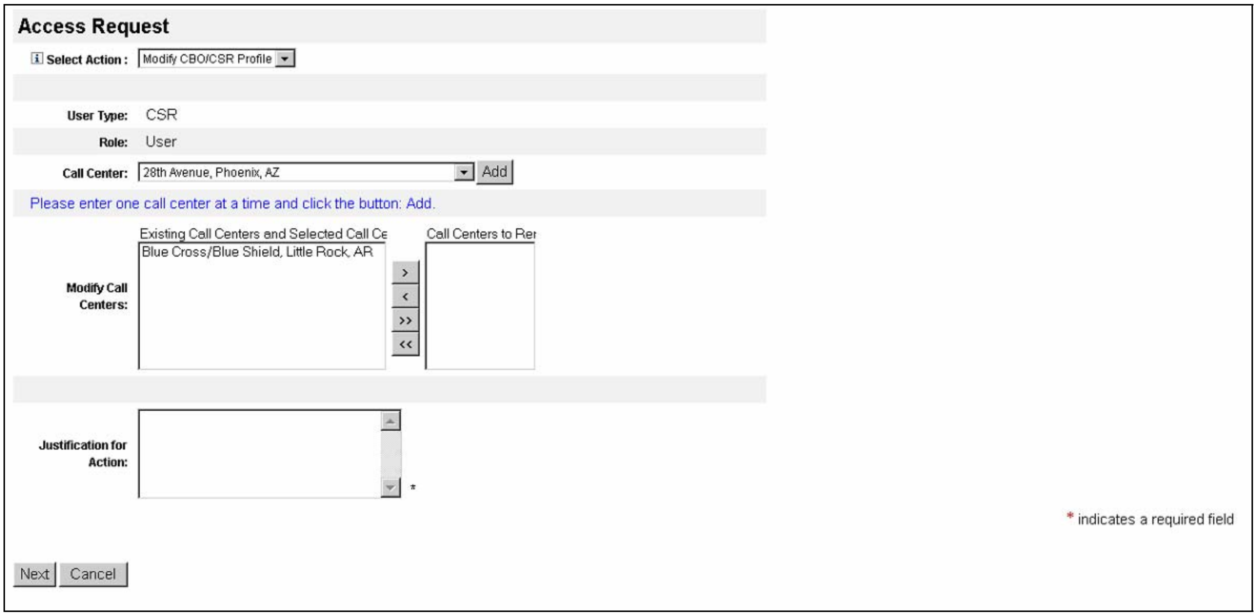

Figure B 16: Modify Account Profile – CBO/CSR

B 2.1.1 Add Call Centers

If you want to ***Add a Call Center*** to your current list of Call Centers, do the following:

Action: Select the Call Center from the *Call Center* field drop-down list.

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

If you want to add another Call Center, repeat the above Actions.

B 2.1.2 Remove Call Centers

If you want to ***Remove a Call Center*** from your current list of Call Centers, do the following:

Action: In the *Modify Call Centers* field areas, within the *Existing Call Centers* area, select the Call Center you want to remove.

Action: Select the button with the right-facing arrow.

The system will move the selected Call Center to the *Call Centers to Remove* area to the right. If you change your mind, you can move the Call Center back to the *Existing Call Centers* area by selecting the button with the left-facing arrow.

If you want to move all the Call Centers in the *Existing Call Centers* area to the *Call Centers to Remove* area, select the button with the double right-facing arrow.

If you change your mind, you can move all the Call Centers back to the *Existing Call Centers* area by selecting the button with the double left-facing arrow.

B 2.1.3 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.

Go to the **Completing Your Account Profile Modification** section of this document for instructions on how to complete your Account Profile modification.

B 2.2 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 17. 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.

Figure B 17: Modify Account Profile – Add Application

The *Select Application* field has a drop-down list of the other CMS applications integrated with IACS as illustrated in Figure B 18.

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

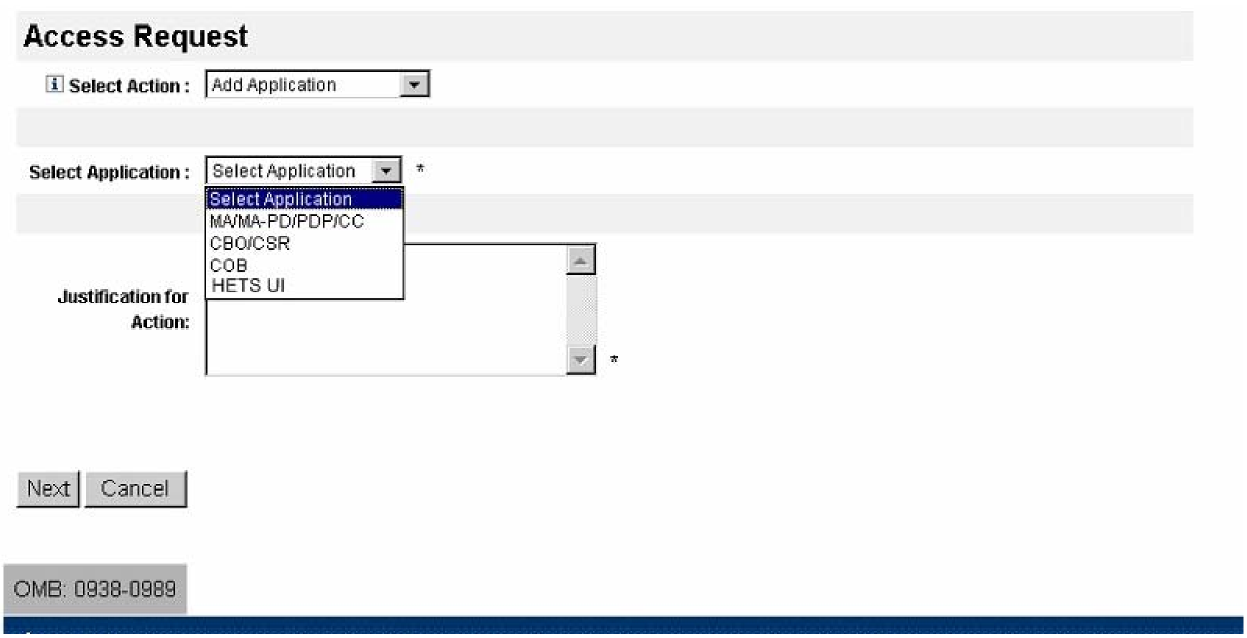

Figure B 18: Modify Account Profile – Select Application Drop-Down List

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 A – MA/MA-PD/PDP/CC –** Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts
- **Attachment C – COB –** Coordination of Benefits – VDSA and COBA Organizations
- **Attachment D – HETS UI –** HIPAA Eligibility Transaction System User Interface

B 2.3 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 B 19. 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.

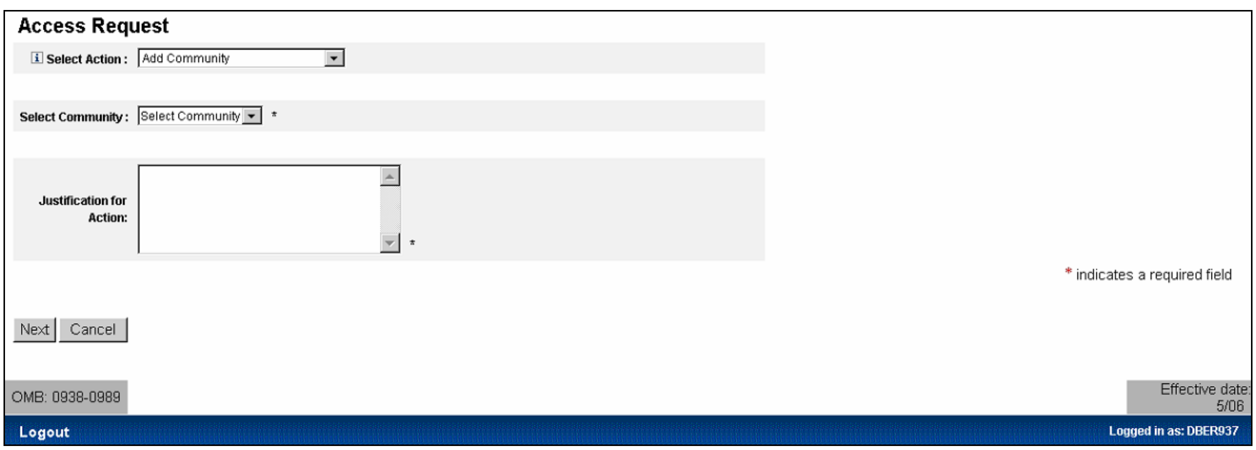

Figure B 19: Modify Account Profile – Select Community Field

The *Select Community* field has a drop-down list containing the available CMS User Communities as illustrated in the example in Figure B 20.

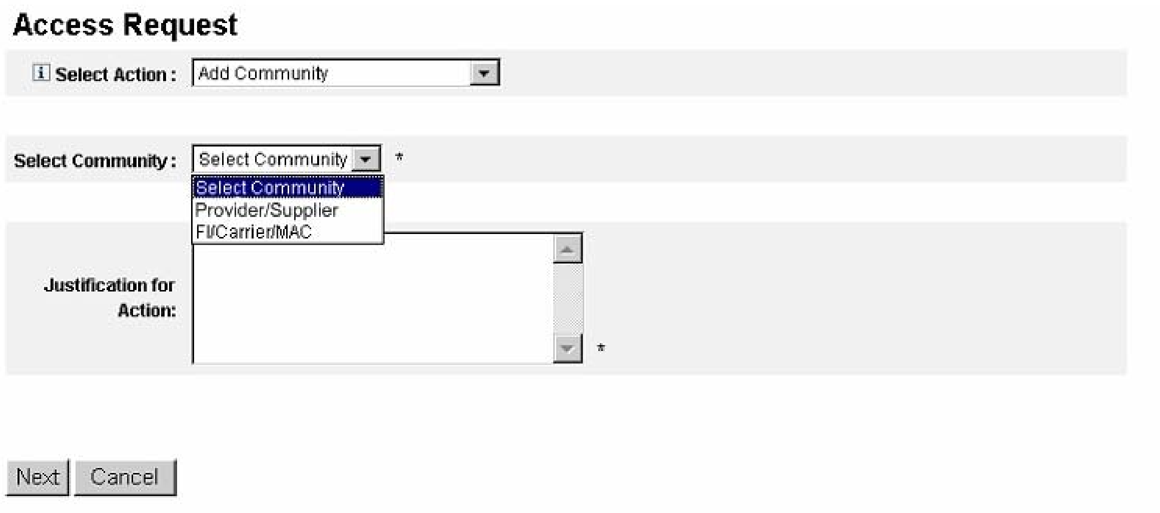

Figure B 20: Modify Account Profile – Select Community Drop-Down List

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**

B 2.4 View My Access Profile

With the ***View My Access Profile*** action selected, the screen will look similar to the example illustrated in Figure B 21. 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.

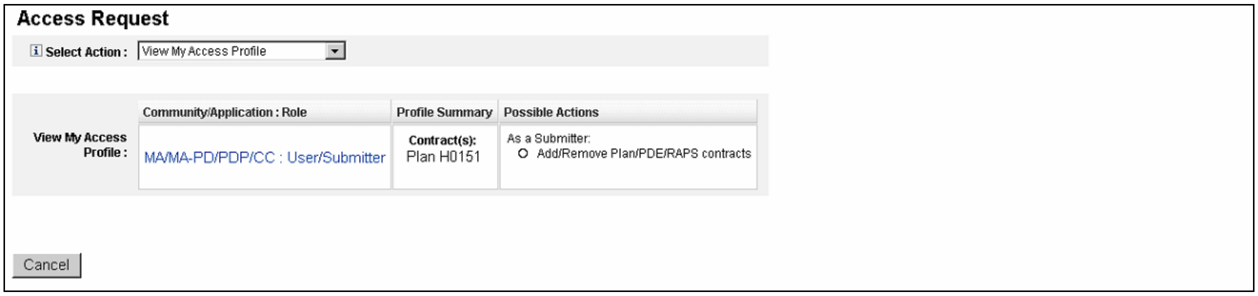

Figure B 21: Example of View My Access Profile Screen

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 contain all the requests you have submitted that are still awaiting approval. This table is illustrated in Figure B 22.

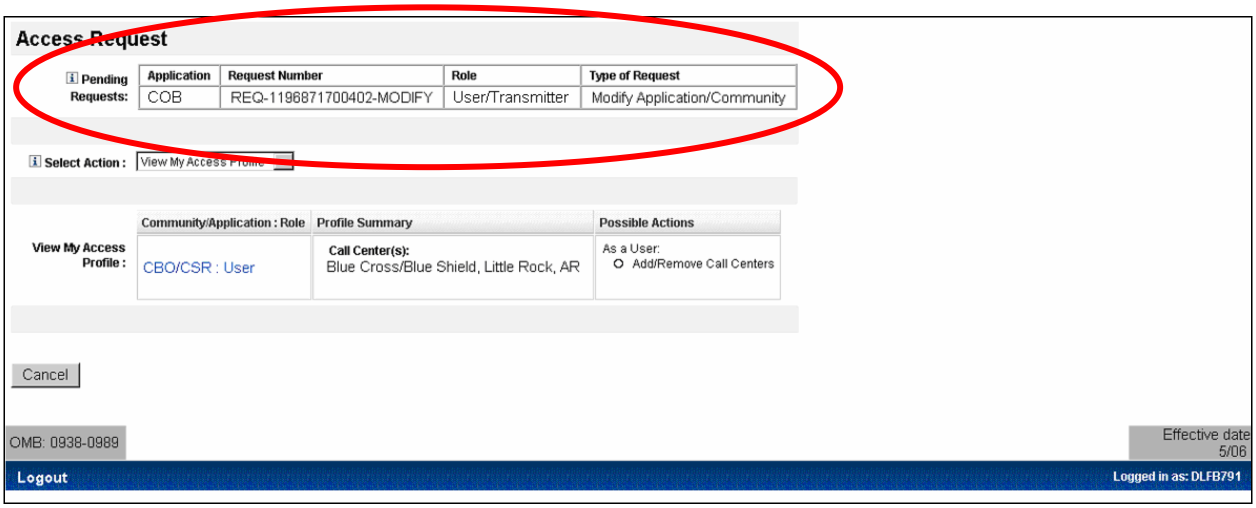

Figure B 22: Example of Pending Requests Table Screen

B 2.5 Completing Your Account Profile Modification

When you select the **Next** button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure B 23.

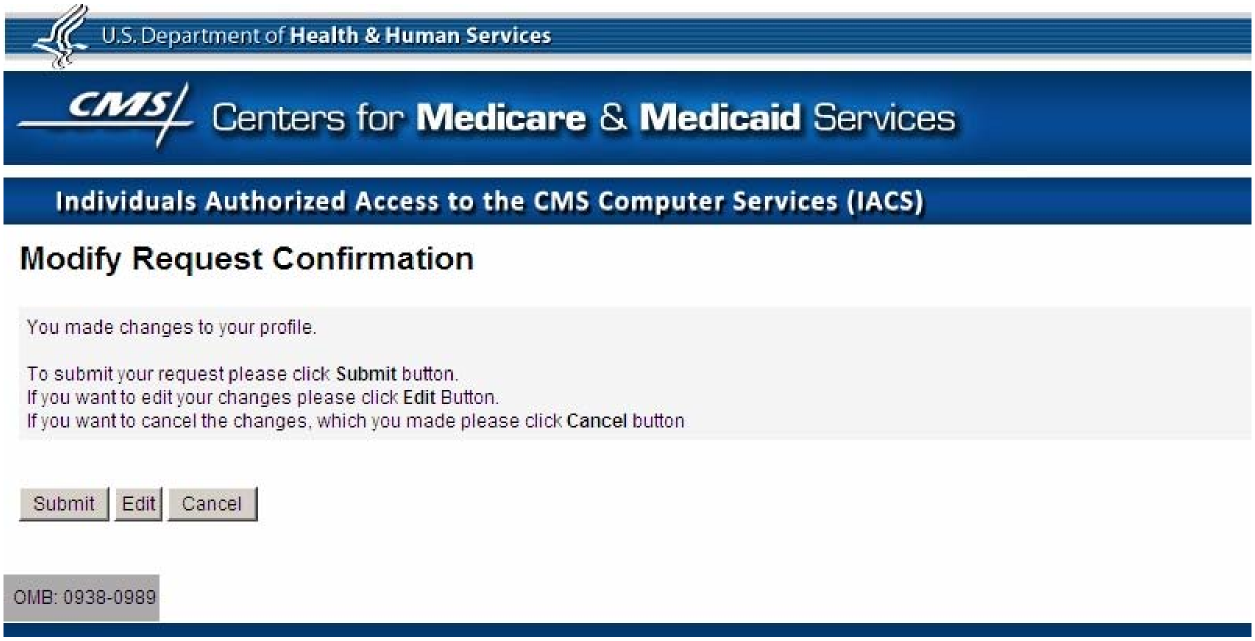

Figure B 23: Modify Request Confirmation Screen

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.

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 B 24. You must select the ***OK*** button to complete your account profile modification.

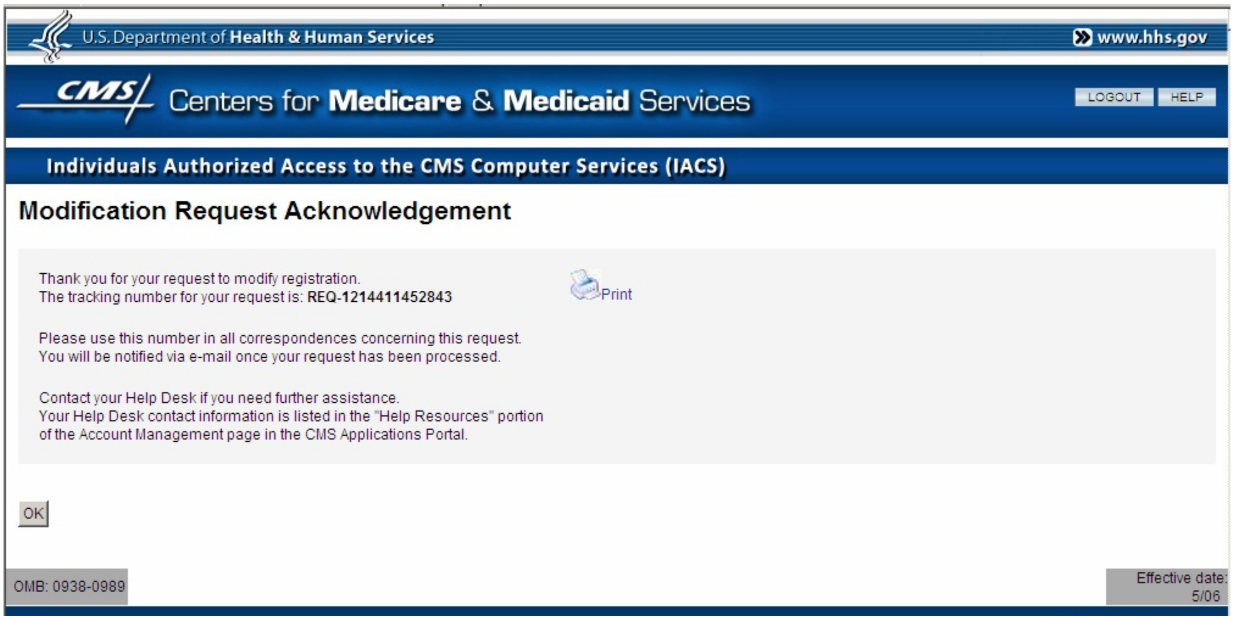

Figure B 24: Modify Request Acknowledgement Screen

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, Figure B 13.

B 2.6 After Your 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.

Note: Removal of Call Centers does not require approval.

End of Attachment B