Individuals Authorized Access to the CMS Computer Services

(IACS) User Guide

Attachment D – HETS UI

HIPAA Eligibility Transaction System User Interface

July 2008

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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 HIPAA Eligibility Transaction System User Interface, HETS UI.
2. Modify your account profile.
3. Access your desired CMS application.

D 1.0 HETS UI 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 D 1.

You then selected the hyperlink for the HETS UI 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 HETS UI application.

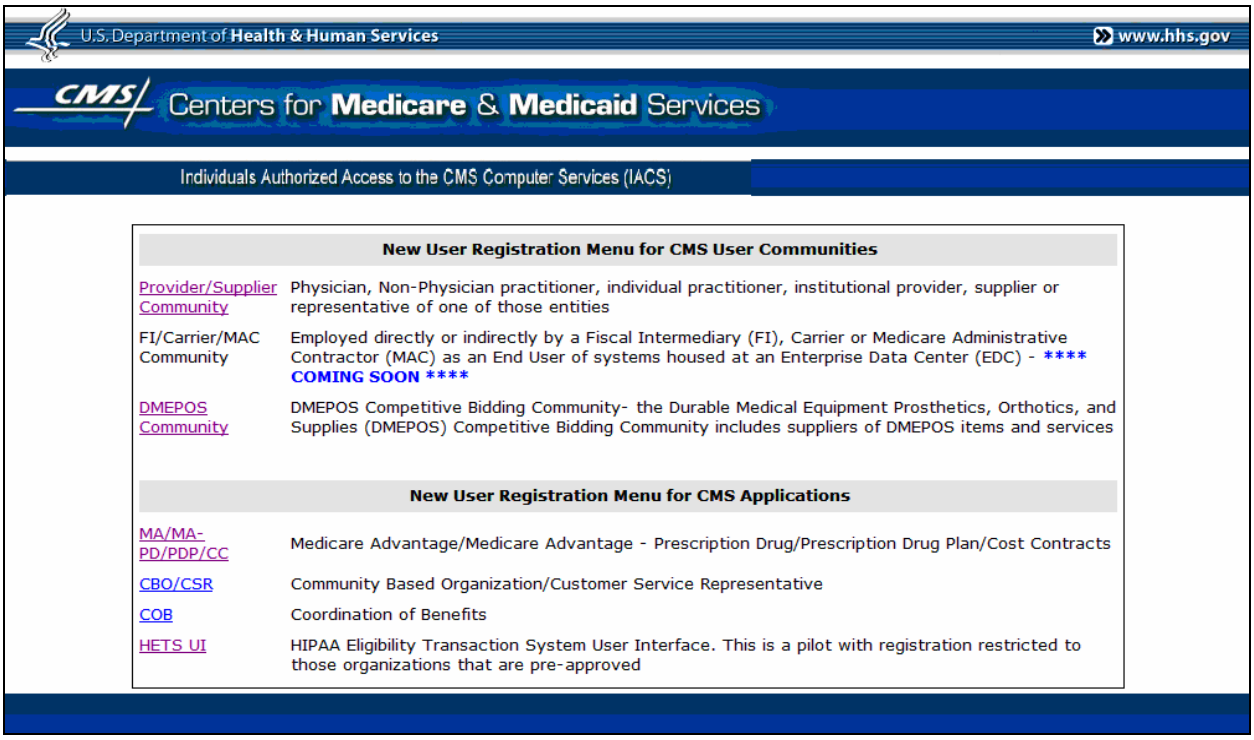


Figure D 1: New User Registration Menu Screen

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

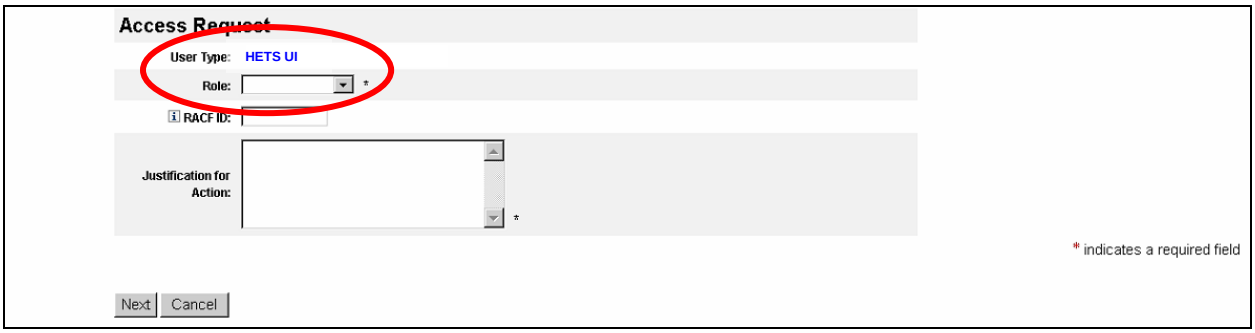


Figure D 2: HETS UI User Type Displayed

In the ***Access Request*** portion of the **New User Registration** screen, as illustrated in Figure D 3, the User Type field will be pre populated with the HETS UI application selection you made on the **New User Registration Menu** screen. A *Role* field, *RACF ID* and *Justification for Action* field are also displayed.

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

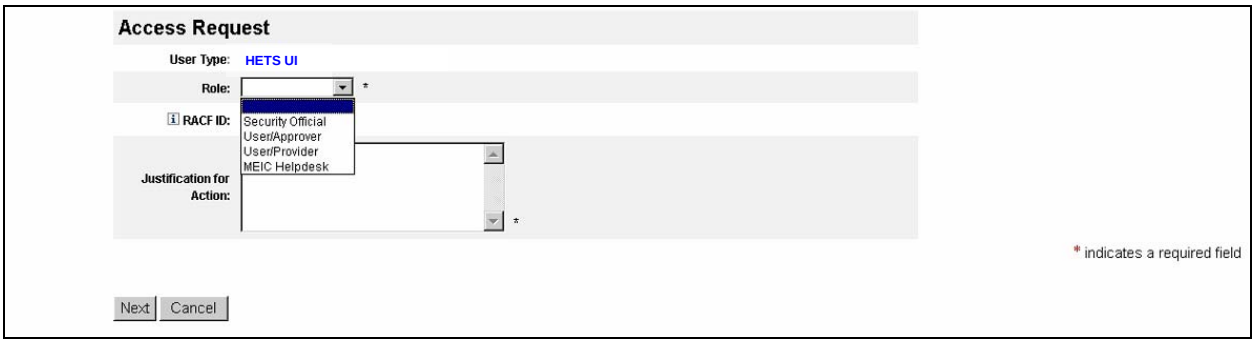


Figure D 3: HETS UI Role Drop-down List

You may select one of the following roles for the HETS UI application:

- **Security Official** –This role represents the organization or facility in IACS. This role registers the organization with IACS using an online version of the Electronic Data Interchange Registration Forms, or EDI Form.
    - There can be two Security Officials at a facility or organization – the ***primary*** Security Official and a ***backup*** Security Official.
- **User/Approver** – This role will be able to approve new user requests for personnel requesting access to the HETS UI Application as User/Providers. Approvers also provide the proper ***Billing Provider NPI*** to new users. This role is also known as an External Point of Contact, or EPOC.
- **User/Provider** – This role will use the HETS UI application to send Medicare eligibility inquiries and read the responses.
- **MEIC Helpdesk** – This role will provide help desk assistance for the CMS Medicare Eligibility Integration Contractor, or MEIC.

D 1.1 HETS UI – User/Provider Role

When you select the role of ***User/Provider***, the screen will refresh and the *Billing Provider NPI, Provider Type*, and *RACF ID* fields will display under the *Role* field as illustrated in Figure D 4. You must provide the required information to register.

- The *Billing Provider NPI* field, required, is a ten digit number that should be provided to you by your Approver or EPOC. If your organization doesn't have an Approver or EPOC, you should check with your Security Official, who will be able to give the NPI number to you.
    - If you are not sure who is your EPOC or Security Official, contact your Help Desk for assistance. This is the MCARE Help Desk. Their phone number is 1-866-440-3805. Their Fax number is 1-615-238-0822. Their email address is: mcare@cms.hhs.gov.
- The *Provider Type* field, required, has a drop-down list that you can use to select your provider type as illustrated in Figure D 5.
- The *RACF ID* field, optional, is provided for you to enter your RACF ID if you have this ID number. This field is illustrated in Figure D 6.

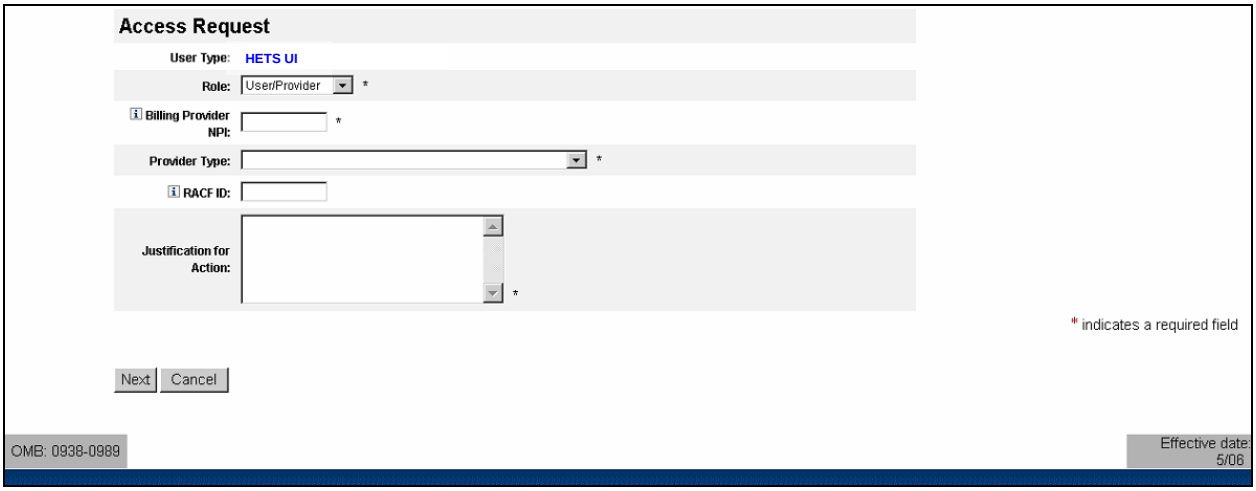


Figure D 4: User/Provider Entry Fields

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

Action: Enter your ***Billing Provider NPI*** in the *Billing Provider NPI* field.

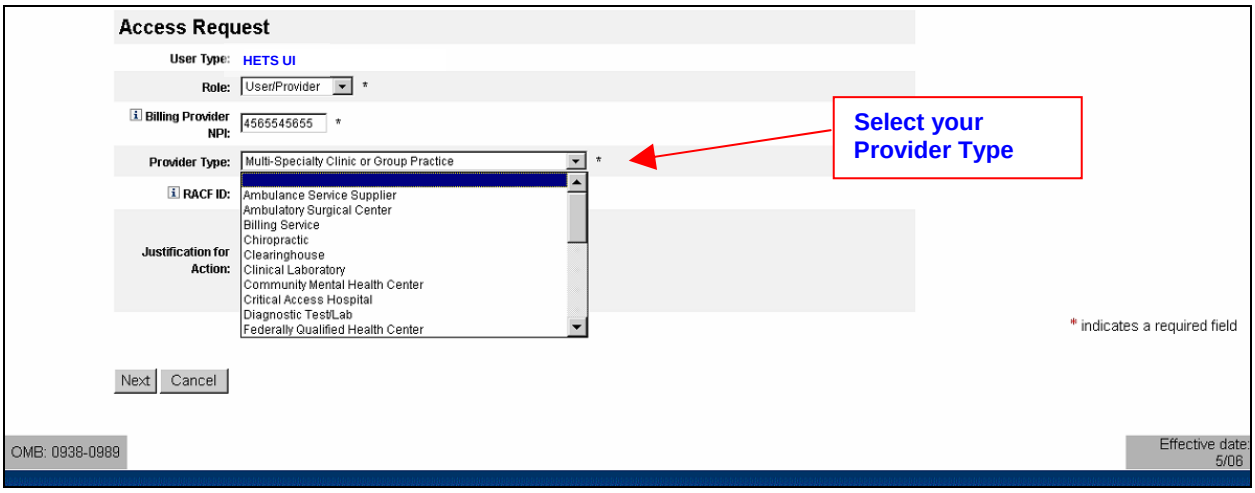


Figure D 5: User/Provider – Provider Type Selection

Action: Select your ***Provider Type*** from the *Provider Type* field drop-down list.

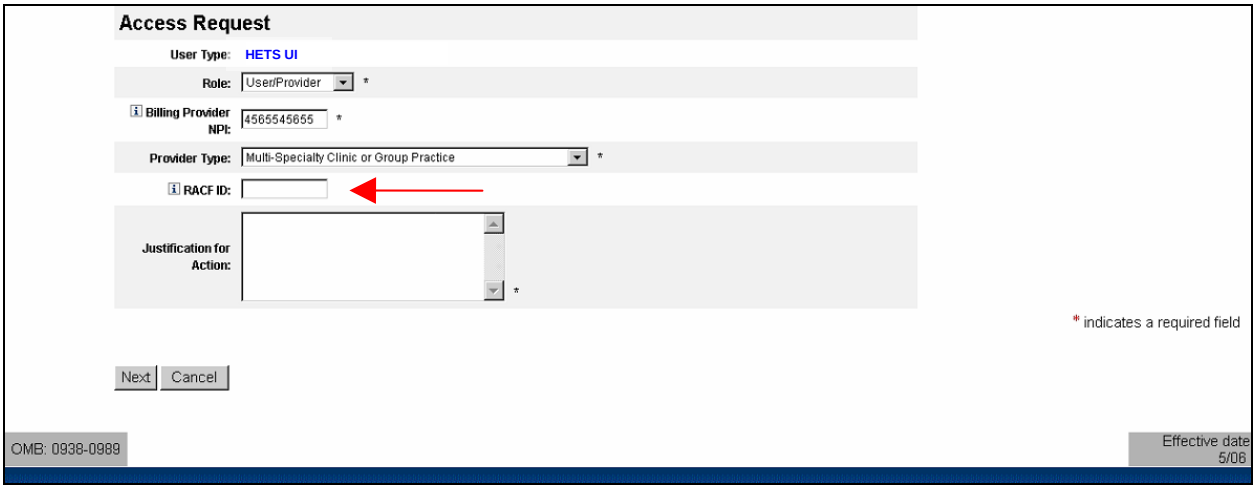


Figure D 6: User/Provider RACF ID Field

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

Note: The RACF ID should be entered in all UPPER case. 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 the IACS **New User Registration** screen 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. IACS 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 synchronize, 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.

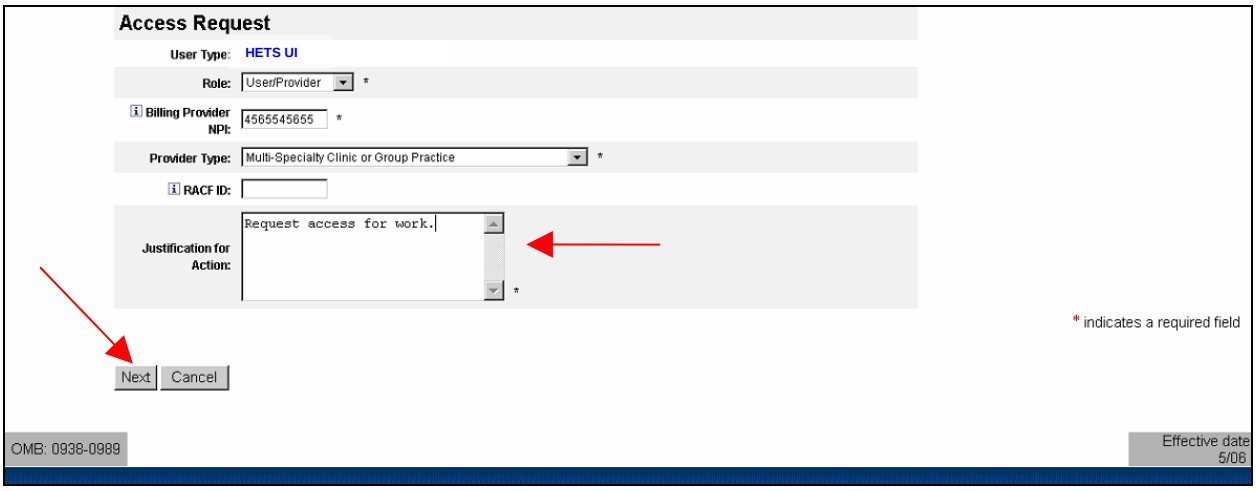


Figure D 7: User/Provider Justification for Action Field

Action: Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 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 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.

D 1.2 HETS UI – User/Approver Role

When you select the role of ***User/Approver***, the screen will refresh and the *Billing Provider NPI, Provider Type*, and *RACF ID* fields will display under the *Role* field as illustrated in Figure D 8. You must provide the required information to register.

- The *Billing Provider NPI* field, required, is a ten digit number that should be provided to you by your Approver or EPOC. If your organization doesn't have an Approver or EPOC, you should check with your Security Official, who will be able to give the NPI number to you.
    - If you are not sure who is your EPOC or Security Official, contact your Help Desk for assistance. This is the MCARE Help Desk. Their phone number is 1-866-440-3805. Their Fax number is 1-615-238-0822. Their email address is: mcare@cms.hhs.gov.
- The *Provider Type* field, required, has a drop-down list that you can use to select your provider type as illustrated in Figure D 9.
- The *RACF ID* field, optional, is provided for you to enter your RACF ID if you have this ID number. This field is illustrated in Figure D 10.

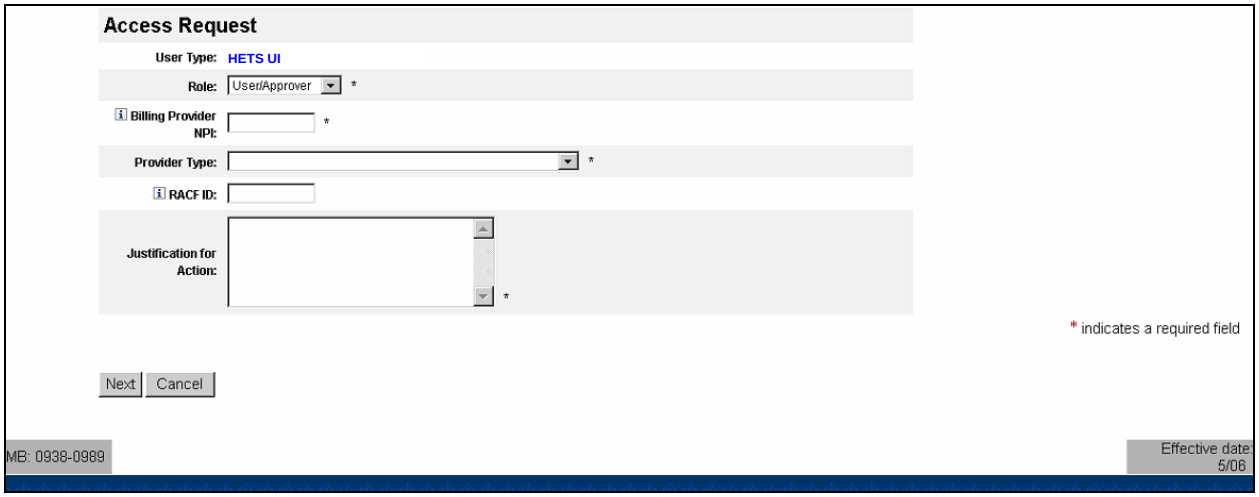


Figure D 8: User/Approver Entry Fields

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

Action: Enter your ***Billing Provider NPI*** in the *Billing Provider NPI* field.

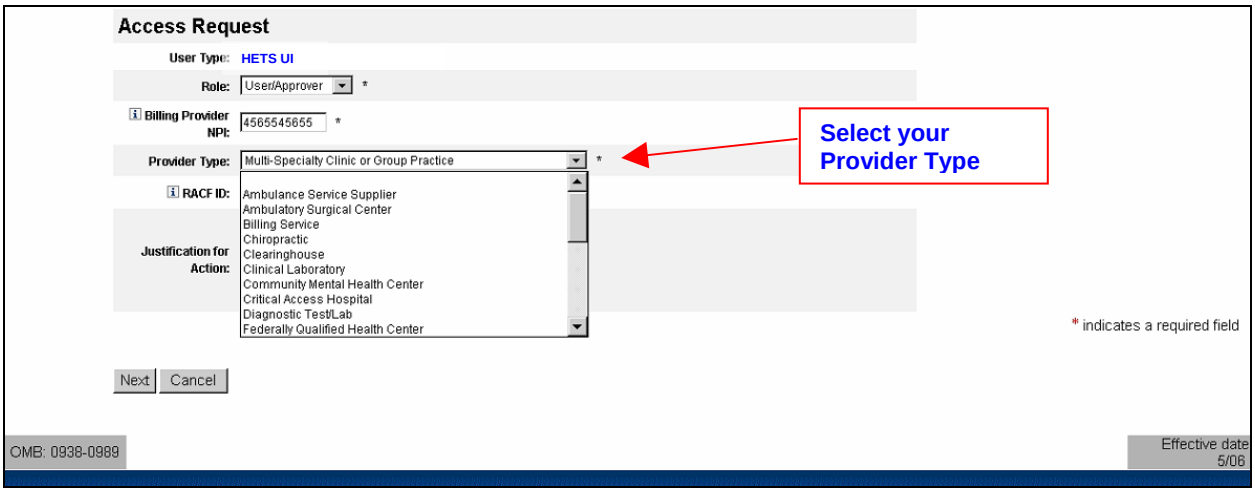


Figure D 9: User/Approver Registration Fields

Action: Select the ***Provider Type*** from the drop-down list in the *Provider Type* field.

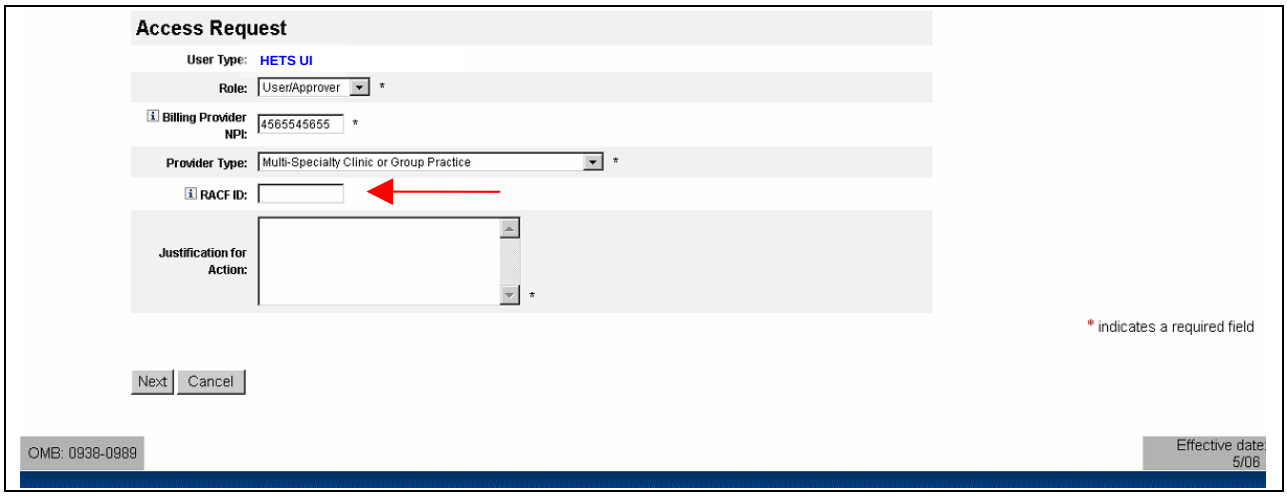


Figure D 10: User/Approver RACF ID Field

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

Note: The RACF ID should be entered in all UPPER case. 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 synchronize, 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.

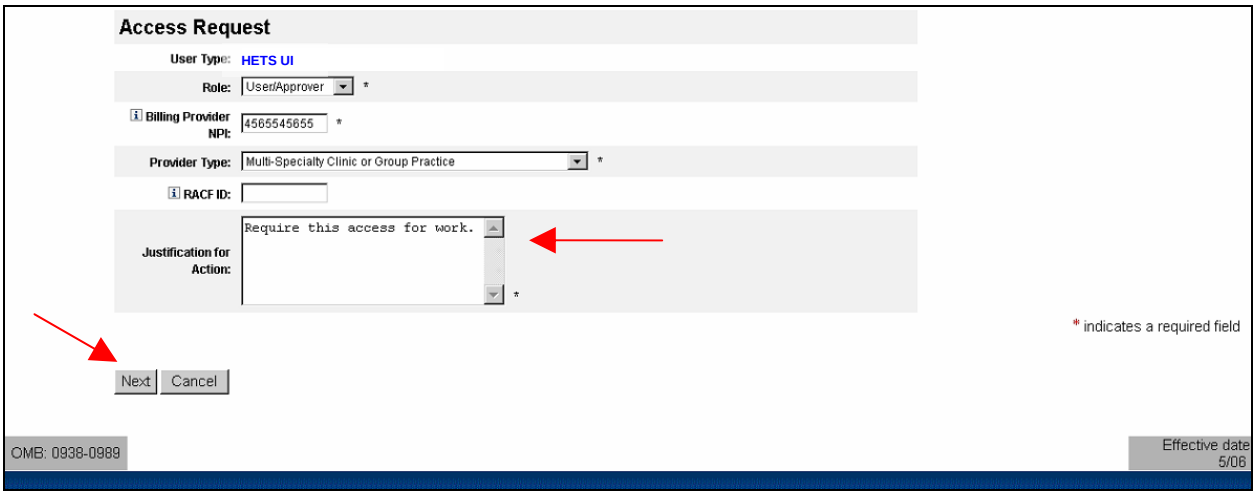


Figure D 11: User/Approver Justification for Action Field

Action: Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 11. 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.

D 1.3 HETS UI – Security Official Role, Primary and Backup

When you select the role of ***Security Official***, the screen will refresh and the *Billing Provider NPI, Provider Type*, and *RACF ID* fields will display under the *Role* field as illustrated in Figure D 12. You must provide the required information to register.

- The *Billing Provider NPI* field, required, is a ten digit number. If you are not sure what this number is, contact your Help Desk for assistance. This is the MCARE Help Desk. Their phone number is 1-866-440-3805. Their Fax number is 1-615-238-0822. Their email address is: mcare@cms.hhs.gov.

- The *Provider Type* field, required, has a drop-down list that you can use to select your provider type.

- The *RACF ID* field, optional, is provided for you to enter your RACF ID if you have this ID number.

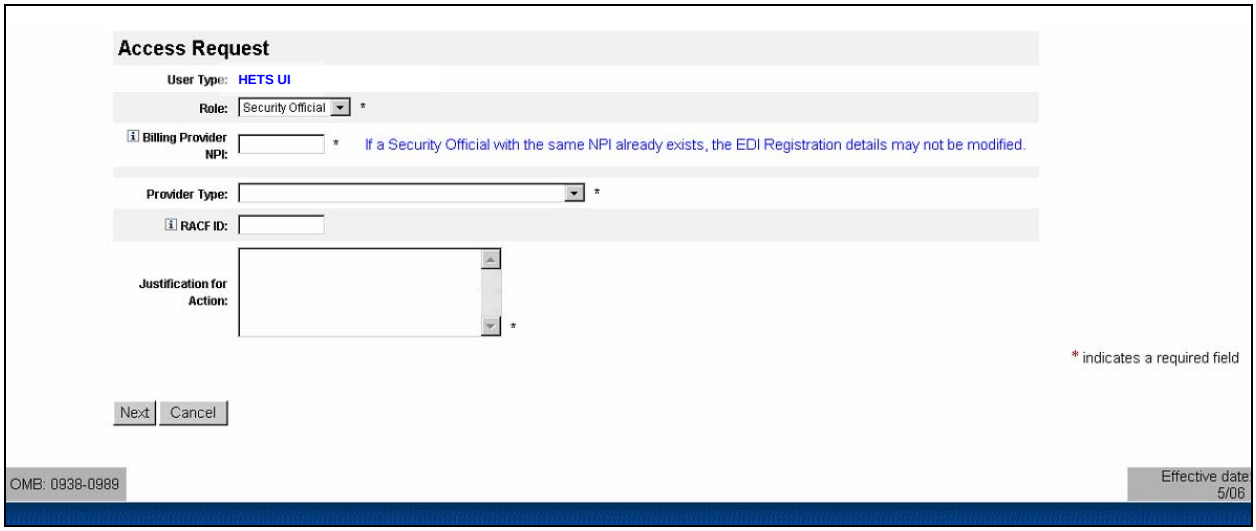


Figure D 12: Security Official Fields

Action: Enter your ***Billing Provider NPI*** in the *Billing Provider NPI* field.

Note: When you enter your Billing Provider NPI, IACS will check to see if there is another user registered as the ***primary*** Security Official for that Billing Provider NPI. If IACS does not find anyone already registered, it will assign you the role of ***primary*** Security Official. If there is a Security Official already registered in IACS for that Billing Provider NPI, you will be assigned the role of ***backup*** Security Official.

- The ***Primary Security Official*** will be required to complete the EDI Registration Form. The procedures for this are presented in Section D 1.3.1, below.

- The ***Backup Security Official*** will be presented with a completed EDI registration form after entering the Billing Provider NPI. This is presented in Section D 1.3.2 of this document.

D 1.3.1 Primary Security Official

The ***primary*** Security Official is responsible for:

- Providing the proper Billing Provider NPI to new users (**User/Providers** and **User/Approvers**) registering in IACS.

- Approving IACS registration requests for certain **User/Approvers.** Please go to Section D 2.0, in this document, for more information on this item.

- Keeping the lists of Physicians, Physician NPIs, and Contractors associated with your provider up to date.

When IACS identifies you as the ***primary*** Security Official, after it checks against the Billing Provider NPI you entered, the screen will refresh and display an EDI Registration Form for you to complete. This screen also contains messages regarding the EDI Registration information. The screen is illustrated in Figure D 13.

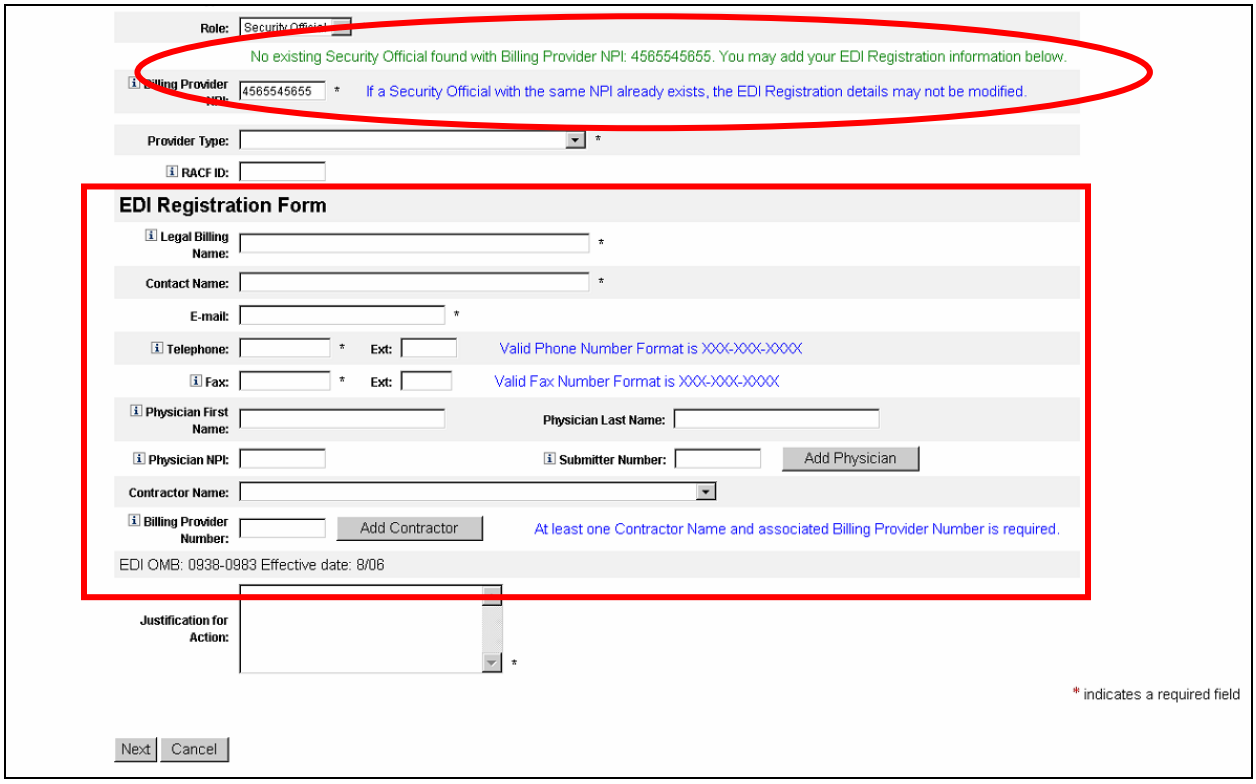


Figure D 13: Primary Security Official Messages and EDI Registration Form

Action: Read the system message displayed under the *Role* field.

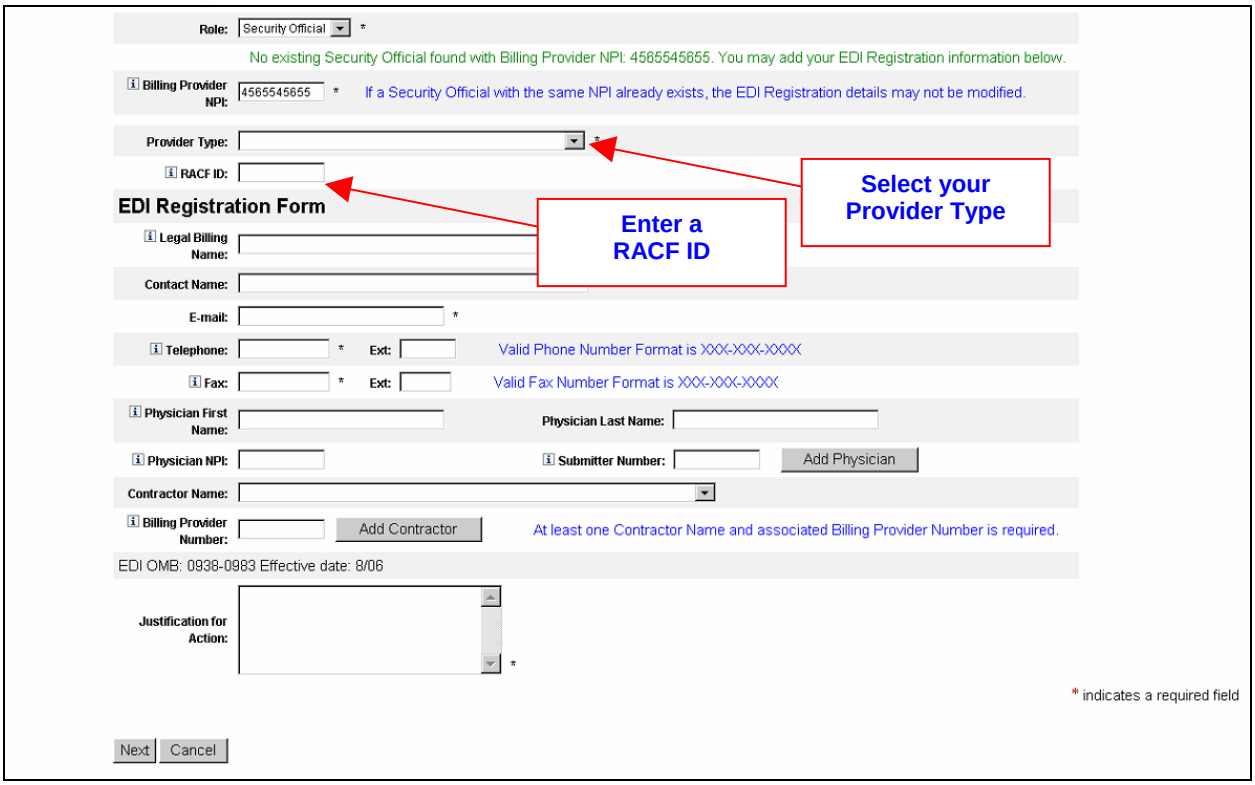


Figure D 14: Security Official - Provider Type and RACF ID

Action: Select the ***Provider Type*** from the drop-down list in the *Provider Type* field.

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

Note: The RACF ID should be entered in all UPPER case. 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 synchronize, 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.

You must then complete all the required fields on the **EDI Registration Form** as illustrated in Figure D 15.

D 1.3.1.1Completing the EDI Registration Form

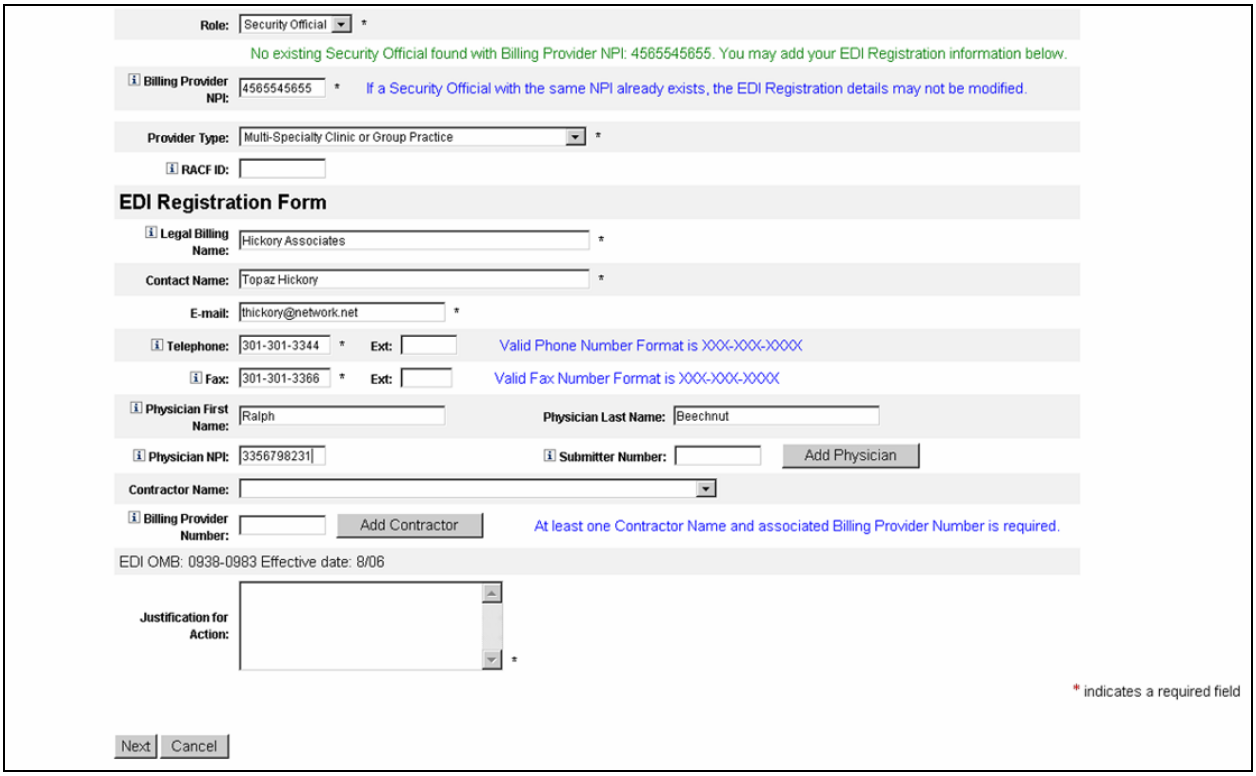


Figure D 15: Security Official EDI Registration Form Fields

Action: Enter the ***Legal Billing Name*** of the Organization in the *Legal Billing Name* field.

Action: Enter the ***Contact Name*** of an authorized contact person at this Organization in the *Contact Name* field.

Action: Enter the business ***Email*** address of this contact person in the *Email* field.

Action: Enter the ***Telephone*** number of this contact person in the *Telephone* field.

Action: Enter the ***Fax*** number of the Organization in the *Fax* field.

Note: To **add a Physician** on the EDI Registration Form, do the following:

Action: Enter the ***Physician's First Name*** in the *Physician First Name* field.

Action: Enter the ***Physician's Last Name*** in the *Physician Last Name* field**.**

Action: Enter the ***Physician's NPI Number*** in the *Physician NPI* field.

Action: Enter the ***Physician's Submitter Number*** in the *Submitter Number* field, if applicable.

Action: Select the ***Add Physician*** button to record your entry.

The screen will refresh and display *Physicians Added/Removed* areas that contain the Physician's name, NPI, and, if appropriate, Submitter Number. This is illustrated in Figure D 16.

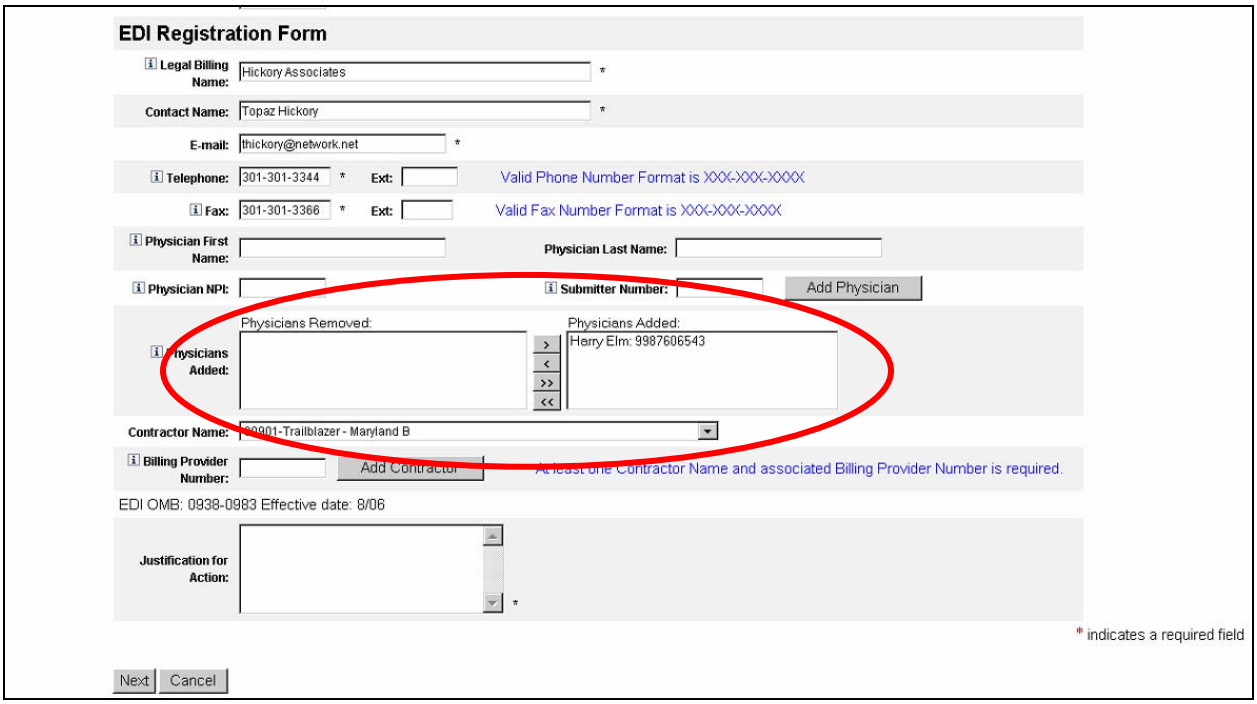


Figure D 16: Security Official – Physicians Added/Removed Areas

If you want to add ***another*** Physician, do the following:

Action: Enter the ***Physician's First Name*** in the *Physician First Name* field.

Action: Enter the ***Physician's Last Name*** in the *Physician Last Name* field**.**

Action: Enter the ***Physician's NPI Number*** in the *Physician NPI* field.

Action: Enter the ***Physician's Submitter Number*** in the *Submitter Number* field, if applicable.

Action: Select the ***Add Physician*** button to record your entry.

The screen will refresh and this physician will be added to the list in the *Physicians Added* area giving the physician's first and last name, NPI number, and, if appropriate, Submitter number.

Repeat this process for each physician you want to add.

Note: To **remove a physician** from the EDI Registration Form, do the following:

Action: Highlight the name of the physician to be removed In the *Physicians Added* area.

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

The system will move the selected physician to the *Physicians Removed* area to the left.

- You can reverse the process and move the physician back to the *Physicians Added* area by highlighting the physician's name and selecting the button with the right-facing arrow.

If you want to **remove all the physicians** in the *Physicians Added* area, select the button with the double left-facing arrow.

- You can reverse the process and move all the physicians back to the *Physicians Added* area by selecting the button with the double right-facing arrow.

When you have finished adding or removing physicians, continue completing the EDI Registration Form.

Note: To **add a Contractor** on the EDI Registration Form, do the following:

Note: The EDI Registration Form ***must contain at least one*** Contractor Name and Billing Provider Number.

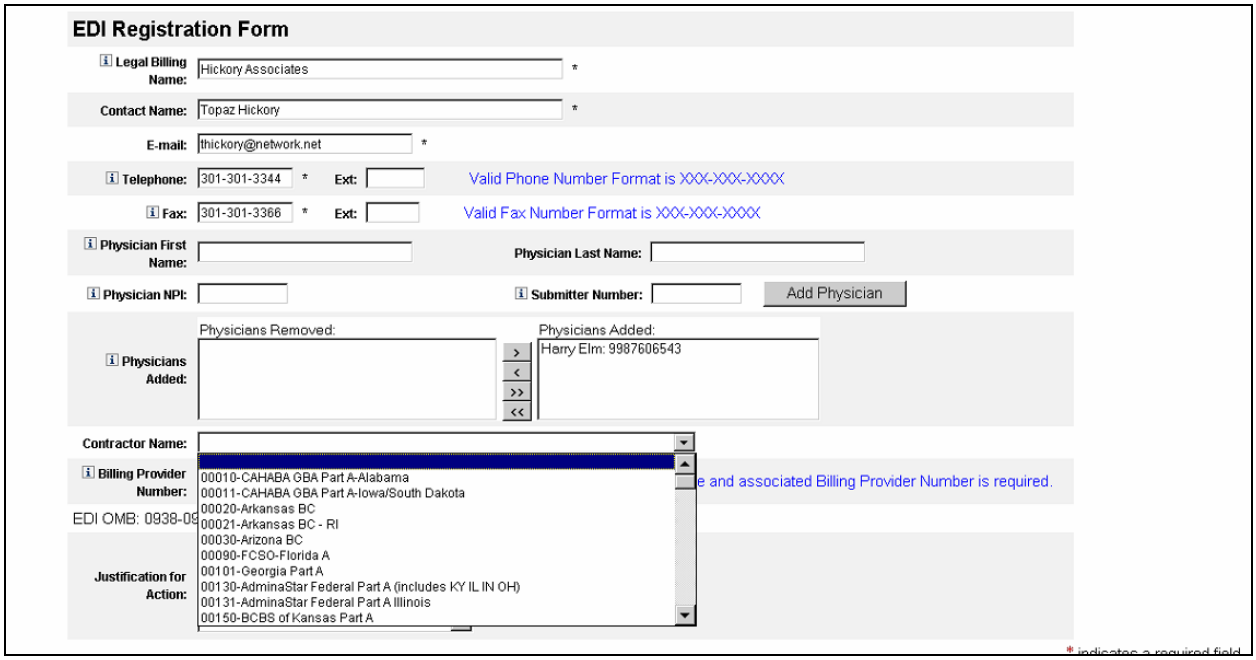


Figure D 17: Security Official – Contractor Name Drop-Down List

Action: Select the ***Contractor Name*** from the drop-down list in the *Contractor Name* field as illustrated in Figure D 17.

Note: The *Contractor Name* field information provides the ***Contractor Workload Identifier***. This identifies the contractor to whom you submit your claims for processing. All such contractors should be identified.

Example: If you send Part A claims to Noridian, select **00320 Noridian A** from the drop-down list and enter their Billing Provider Number. If you also send Part A claims to Chisholm, you would select **00340 Chisholm Adm Services OK A**, and also enter a Billing Provider Number with that contractor as well.

After you select a contractor name, the screen will refresh and add a Contractor Information area label to the EDI Registration Form as illustrated in Figure D 18.

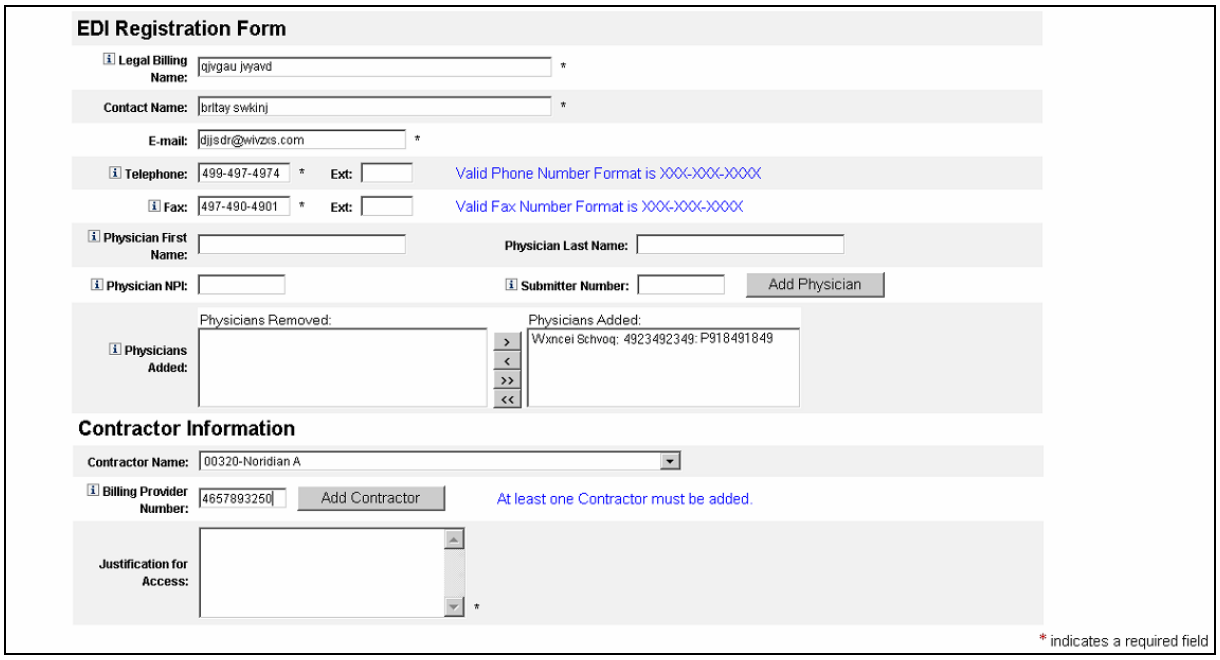


Figure D 18: Security Official – Contractor Billing Provider Number

Action: Enter the ***Billing Provider Number*** in the *Billing Provider Number* field.

Note: The Billing Provider Number can be from two to ten alphanumeric characters long. This number should be your organization's legacy Medicare Provider ID number. That is the Medicare Provider number your organization used prior to obtaining an NPI number.

Action: Select the ***Add Contractor*** button to record each contractor and billing provider number entry.

The screen will refresh and display *Contractor Added/Removed* areas that contain the Contractor Name and Billing Provider Number as entered in the Contractor Information area of the screen and illustrated in Figure D 19.

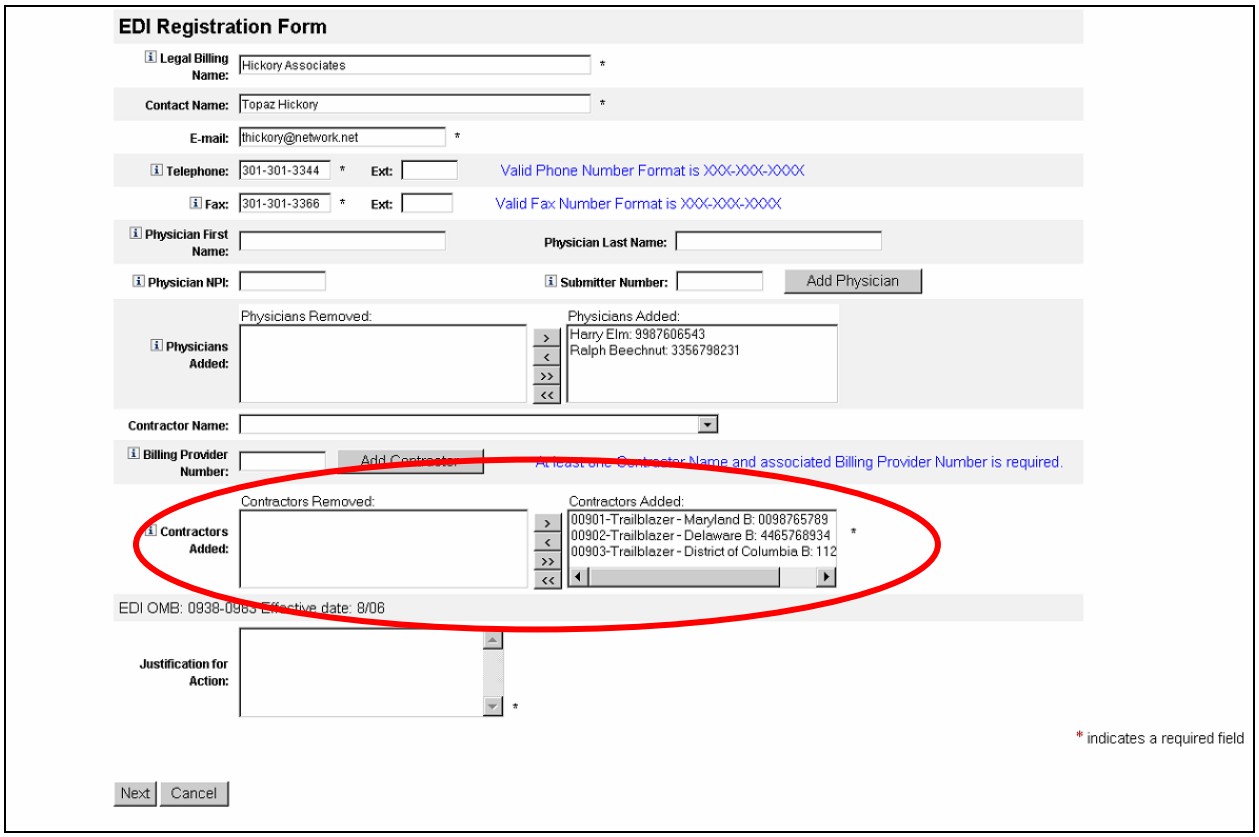


Figure D 19: Security Official Add/Removed Contractor Areas

If you want to ***add another Contractor***, do the following:

Action: Select the ***Contractor Name*** from the drop-down list in the *Contractor Name* field as illustrated in Figure D 17.

Action: Enter the ***Billing Provider Number*** in the *Billing Provider Number* field.

Action: Select the ***Add Contractor*** button to record each contractor and billing provider number entry.

The screen will refresh and this contractor will be added to the list in the ***Contractors Added*** area.

Repeat this process for each contractor you want to add.

If you want to **remove a contractor** from the EDI Registration Form, do the following:

Action: Highlight the name of the contractor to be removed In the ***Contractors Added*** area.

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

The system will move the selected contractor to the ***Contractors Removed*** area to the left.

You can reverse the process and move the contractor back to the ***Contractors Added*** area by highlighting the contractor's name and selecting the button with the right-facing arrow.

If you want to **remove all the contractors** in the ***Contractors Added*** area, select the button with the double left-facing arrow.

You can reverse the process and move all the contractors back to the ***Contractors Added*** area by selecting the button with the double right-facing arrow.

When you have finished adding or removing contractors, continue the registration process.

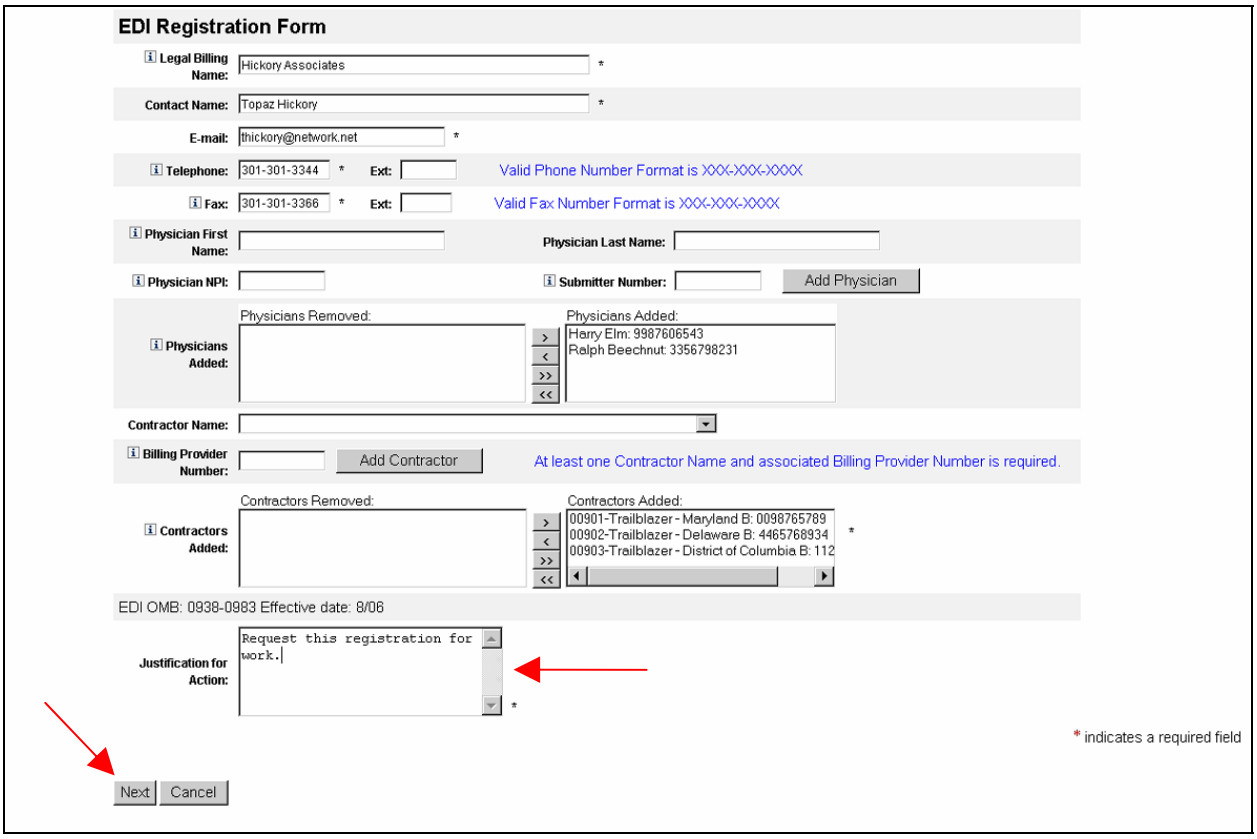


Figure D 20: Justification for Action Field for Security Official

Action: Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 20. 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.

D 1.3.2 Backup Security Official

The ***backup*** Security Official is responsible for:

- Approving IACS registration requests for certain **User/Approvers**, as an additional approver. For more information on this item, see Section D 2.0, in this document.
- During the ***absence of the primary*** Security Official:
  - Keeping the lists of Physicians, Physician NPIs, and Contractors associated with your provider up to date.
  - Providing the proper Billing Provider NPI to new users (**User/Providers** and **User/Approvers**) registering in IACS.

Note: If you are ever required to assume the role of ***primary*** Security Official, you must call the MEIC Help Desk and request that they change your status from ***backup*** to ***primary*** Security Official. The help desk should also change the status of the primary Security Official so that he or she can no longer act as Security Official while you are acting in that role.

When the former primary Security Official is ready to reassume the duties of that role, you must call the MEIC Help Desk and request that they change your statuses again.

The MEIC Help Desk phone number is 1-866-440-3805. They can also be contacted by email at *MCARE@cms.hhs.gov*.

Note: There should ***only be one Security Official*** for your provider organization ***at any time.***

IACS will identify you as the ***backup*** Security Official, after it checks against the Billing Provider NPI you enter.

The screen will refresh and display an EDI Registration Form that has already been completed by the ***primary*** Security Official. You cannot modify the information on this EDI Registration Form.

This is illustrated in Figure D 21.

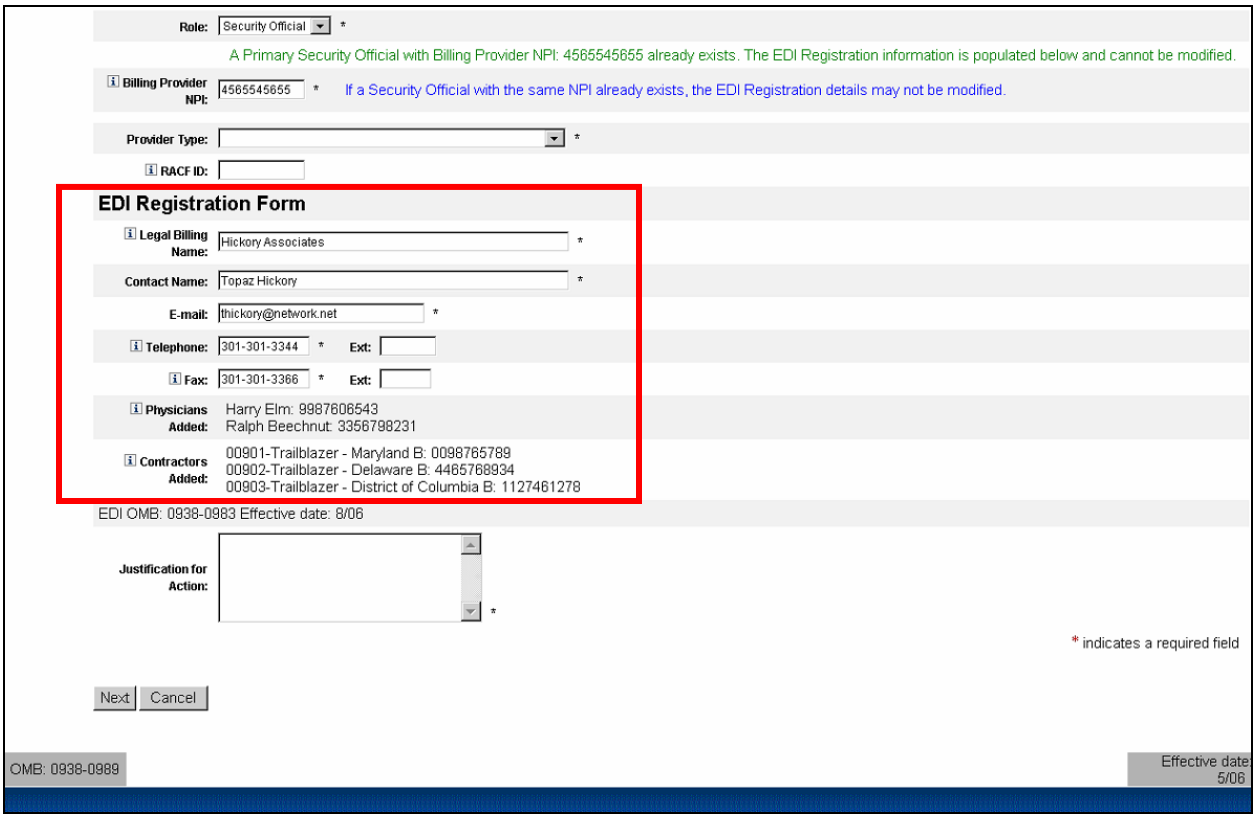


Figure D 21: Backup Security Official Screen with Completed EDI Registration Form

Continue with your registration as illustrated in Figure D 22.

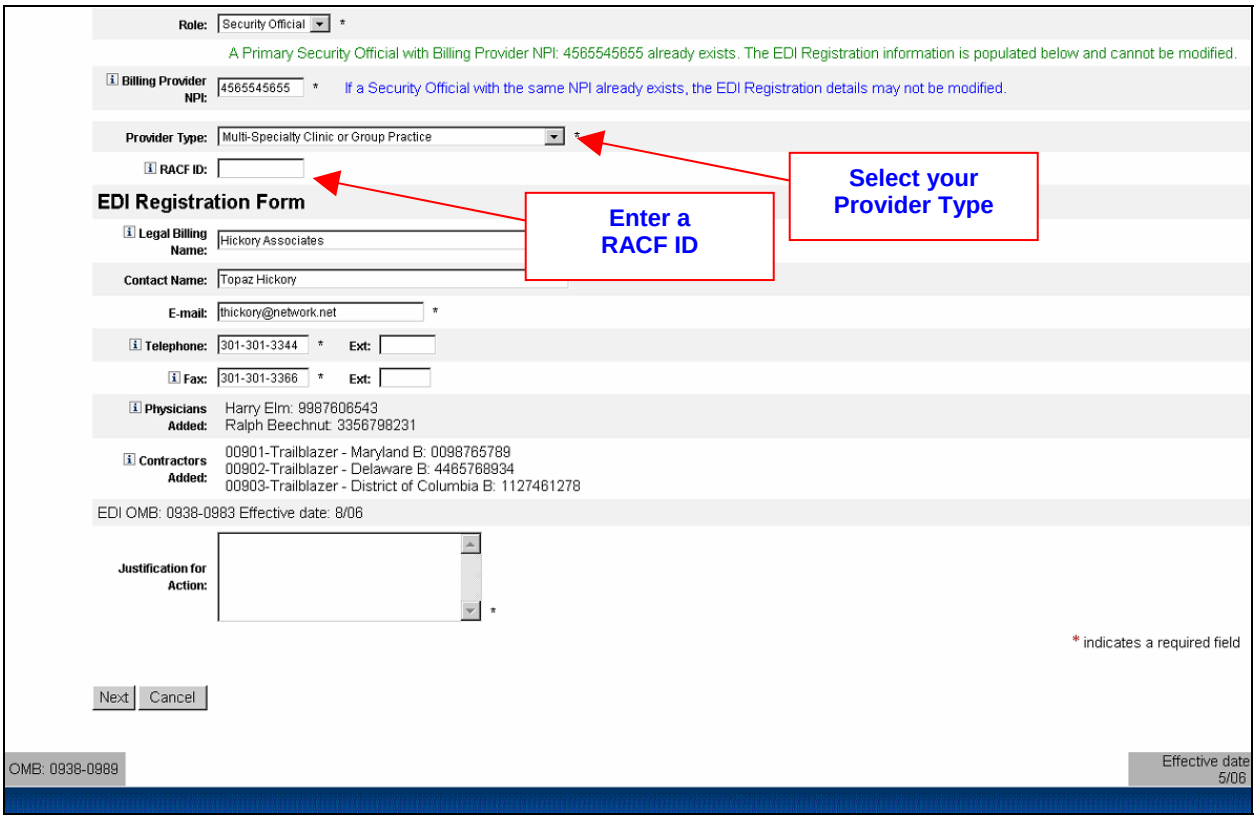


Figure D 22: Backup Security Official Provider Type Selection and RACF ID Field

Action: Select the ***Provider Type*** from the drop-down list in the *Provider Type* field.

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

Note: The RACF ID should be entered in all UPPER case. 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 synchronize, 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.

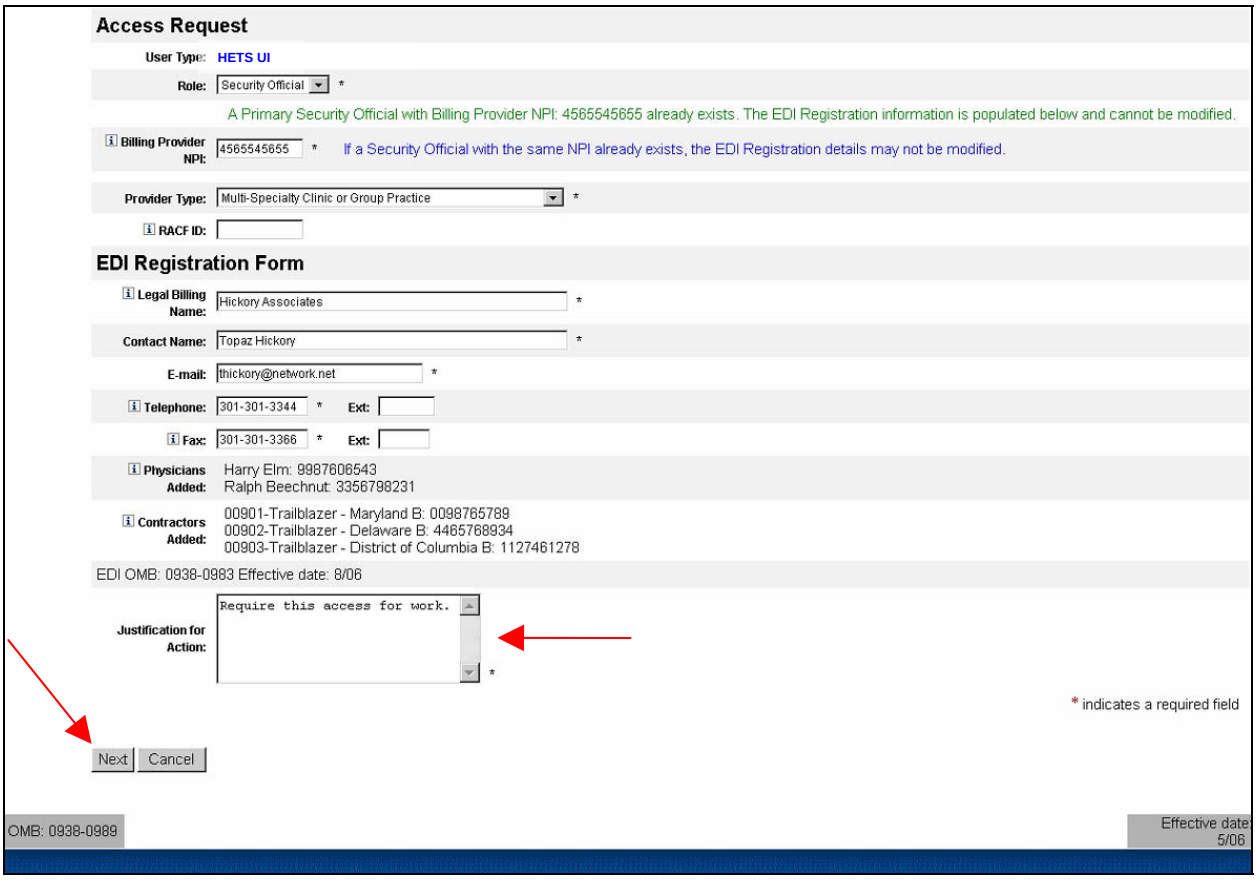


Figure D 23: Backup Security Official Justification for Action Field

Action: Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 23. 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.

D 1.4 MEIC Help Desk Role

When you select the role of ***MEIC Help Desk***, the screen will refresh and a *RACF ID* field and *Justification for Action* field will display as illustrated in Figure D 24.

The ***MEIC Help Desk*** is responsible for:

- Approving IACS registration requests for certain **User/Approvers** and **Security Officials**, as described in Section D 2.0, in this document.
- Maintaining the status of an organization's ***primary*** and ***backup*** Security Officials to ensure that there is only one active ***primary*** Security Official, at any time.
- Validating and/or correcting invalid information provided by Security Officials during registration.
- Identifying small organizations, that is, providers with less than ten personnel.
- Revoking and Restoring access privileges for HETS UI registrants.
- Producing specified reports.

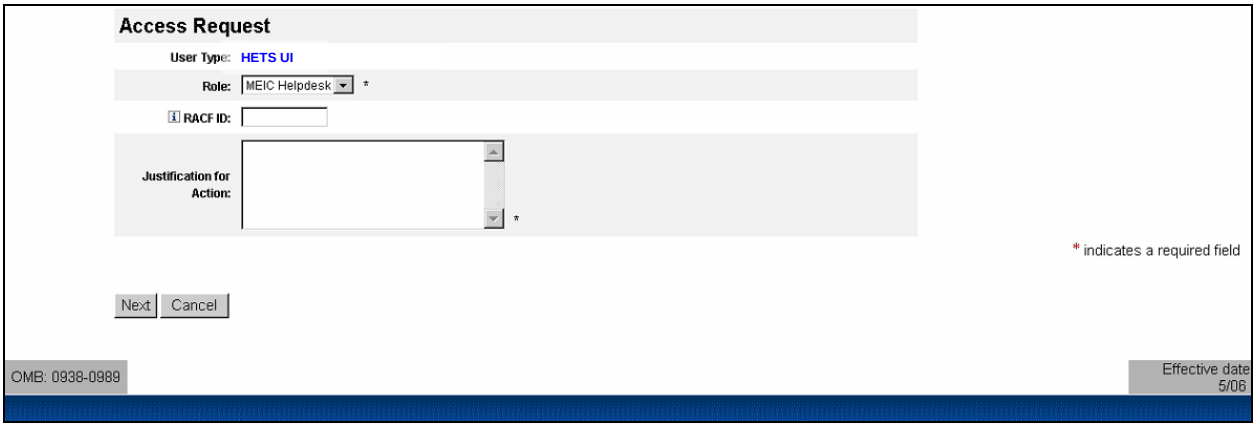


Figure D 24: MEIC Help Desk Role Screen

Action: Select the ***MEIC Helpdesk*** role from the drop-down list in the *Role* field.

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

Note: The RACF ID should be entered in all UPPER case. 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 synchronize, 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.

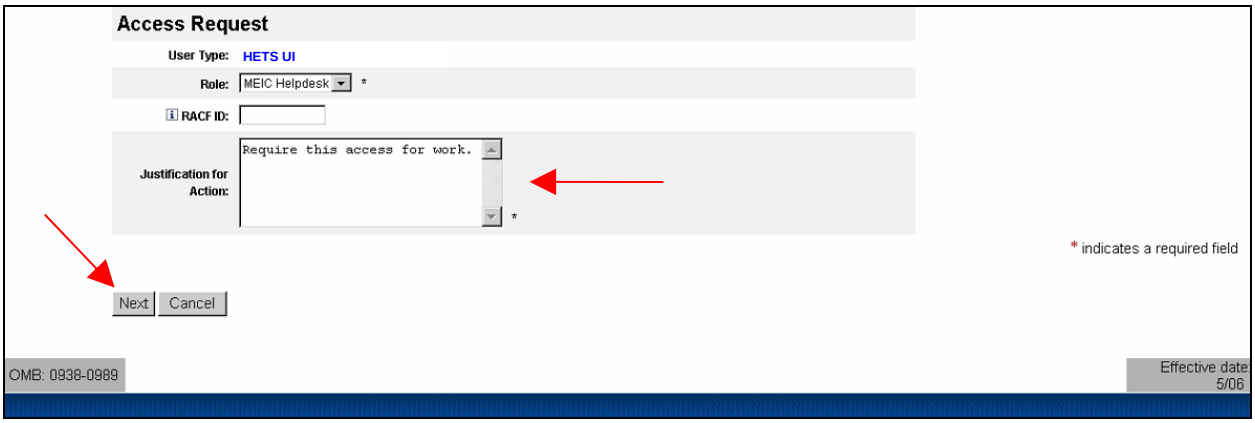


Figure D 25: MEIC Help Desk Justification for Action Field

Action: Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 25. 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.

D 2.0 HETS UI Approval Processes

D 2.1 Typical Approval Process

After the IACS registration process is completed as described in the **Completing Your New User Registration** section in the IACS User Guide Main Body, your registration request is submitted for approval.

For all HETS UI roles, the actual approver will depend on the role selected and the requester's organization.

The approval process illustrated in Figure D 26 represents the ***typical approval process*** for larger provider organizations in which there are sufficient personnel for the role of **User/Approver**, or EPOC, to be viable role.

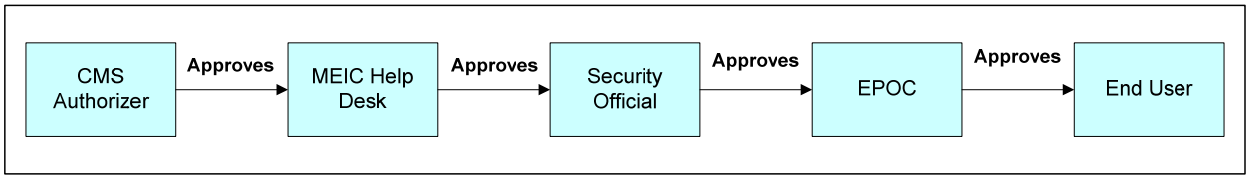


Figure D 26: Typical HETS UI Approval Process

In the typical approval process, a CMS Authorizer will approve the MEIC Help Desk user. After the MEIC Help Desk user is approved, he or she has the authority to approve HETS UI users at all other levels.

The MEIC Help Desk is the only approval authority of the Security Official. The Security Official approves **User/Approvers**, or EPOCS, who in turn, approve **User/Providers**, or End Users.

D 2.2 Special Approval Process

In smaller provider organizations, with fewer than ten personnel, in which the User/Approver, or EPOC, role is not a viable role, a special approval process is followed. This ***special approval process*** is illustrated in Figure D 27.

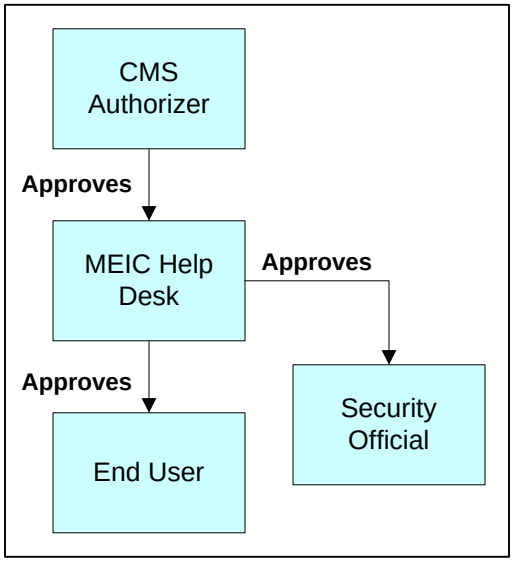


Figure D 27: Special Approval Process

The MEIC Help Desk approves the Security Official.

The MEIC Help Desk approves ***User/Providers***, or End Users.

The Security Official, in this ***special approval process***, has no approval authority, since their role only has approval authority for ***User/Approvers***, or EPOCs.

Note: All provider organizations must have a Security Official within the organization, no matter how few individuals work there.

D 3.0 Modify Account Profile

You may need to modify your IACS account profile to request a role in another IACS integrated CMS Application or CMS User Community. All HETS UI users can request these modifications.

However, only ***primary*** Security Officials can directly modify information provided in the EDI Registration Form.

- ***All other HETS UI users*** must contact the MEIC Help Desk to make changes to their HETS UI related account profile information.

Note: The Help Desk phone number is 1-866-440-3805. Their Fax number is 1-615-238-0822 and their email address is: mcare@cms.hhs.gov.

For ***primary*** Security Officials, modifying their account profile information can involve:

- Adding physicians or contractors to their current lists.
- Removing physicians or contractors from their current lists.
- Changing information on the EDI Registration Form such as contact names and telephone numbers.

For ***all HETS UI users***, modifying their account profile information can involve:

- Requesting access to a CMS application integrated with IACS.
- Requesting a role in a CMS User Community integrated with IACS.

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 D 28.

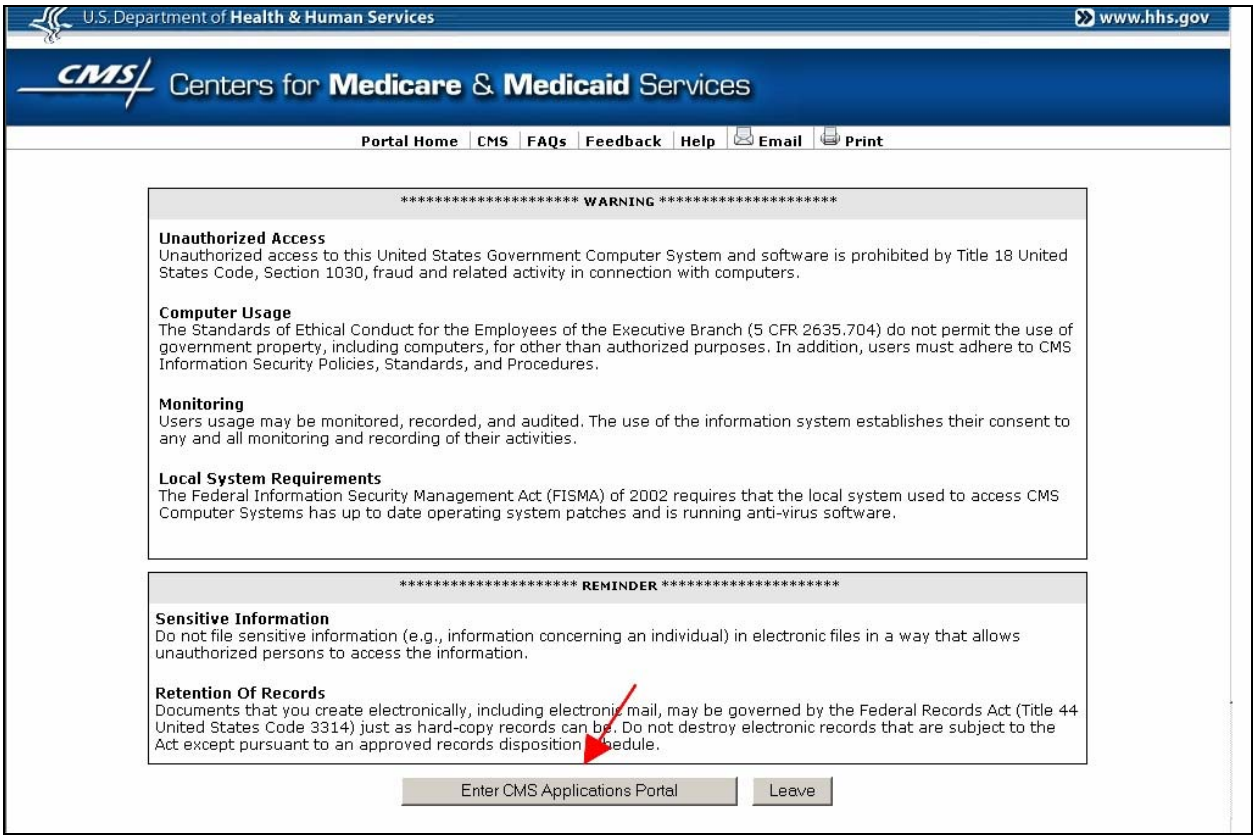


Figure D 28: CMS Applications Portal WARNING/REMINDER Screen

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 D 29.

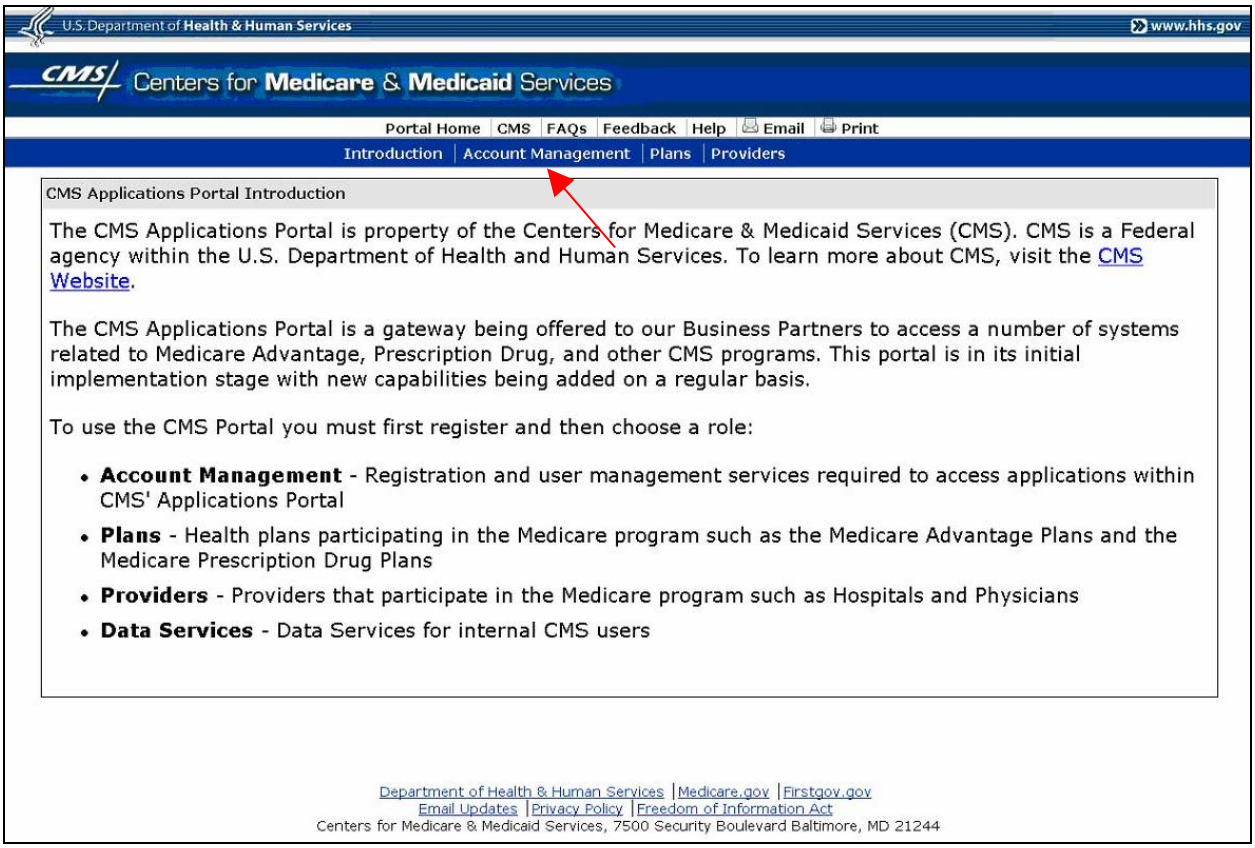


Figure D 29: CMS Applications Portal Introduction Screen

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

The **Account Management** screen will display as illustrated in Figure D 30.

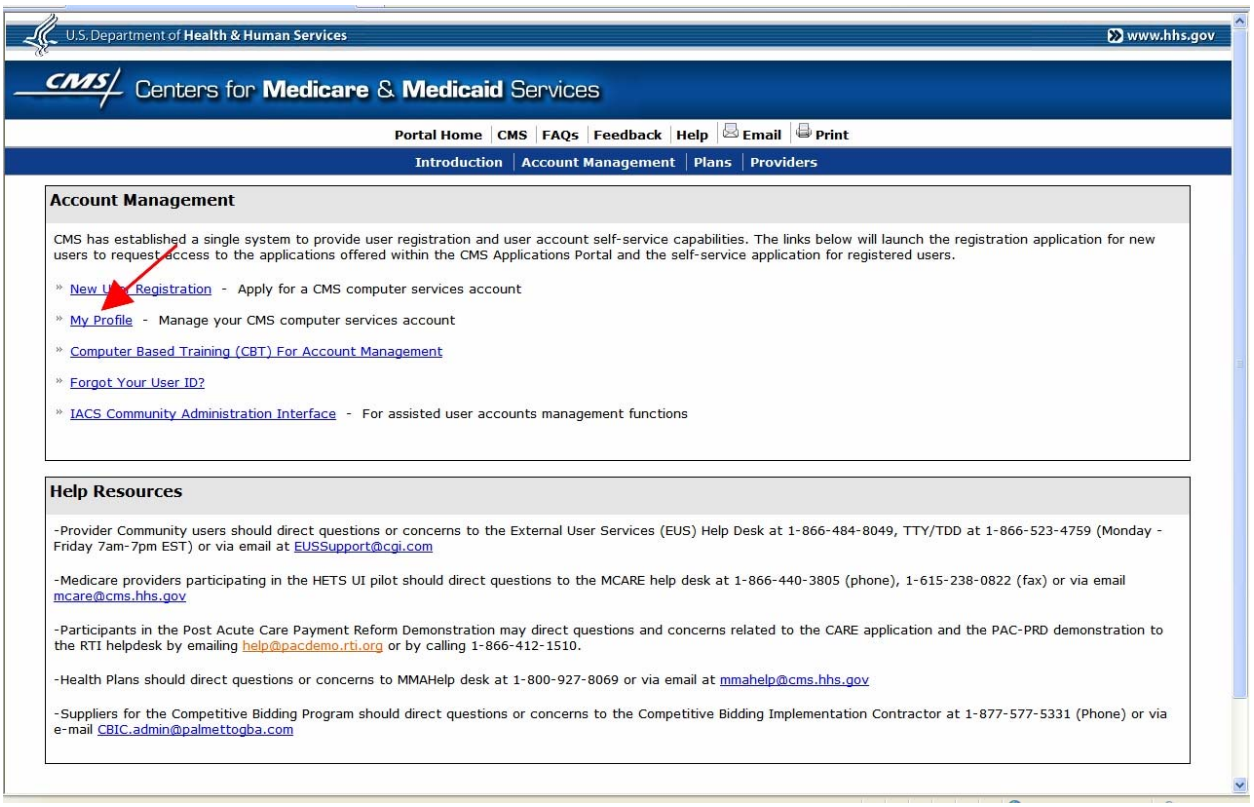


Figure D 30: Account Management Screen

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

The **Login to IACS** screen will display as illustrated in Figure D 31.

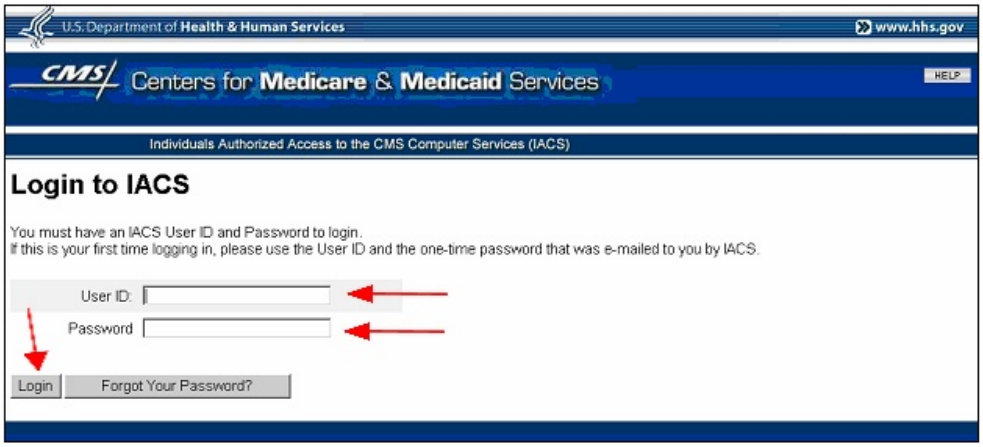


Figure D 31: Login to IACS Screen

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

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

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

The **My Profile** screen will be displayed as shown in Figure D 32.

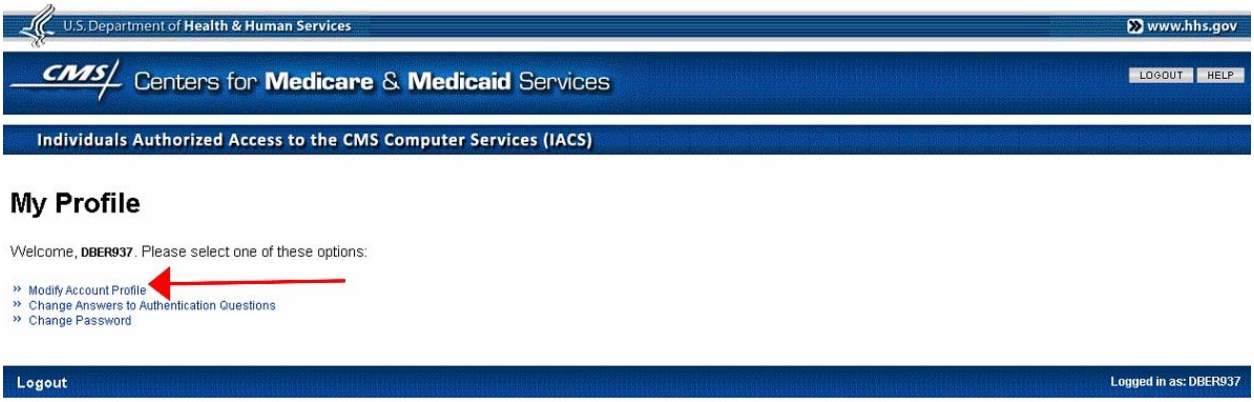


Figure D 32: My Profile – Modify Account Profile Option

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 D 33.

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 D 35: 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.

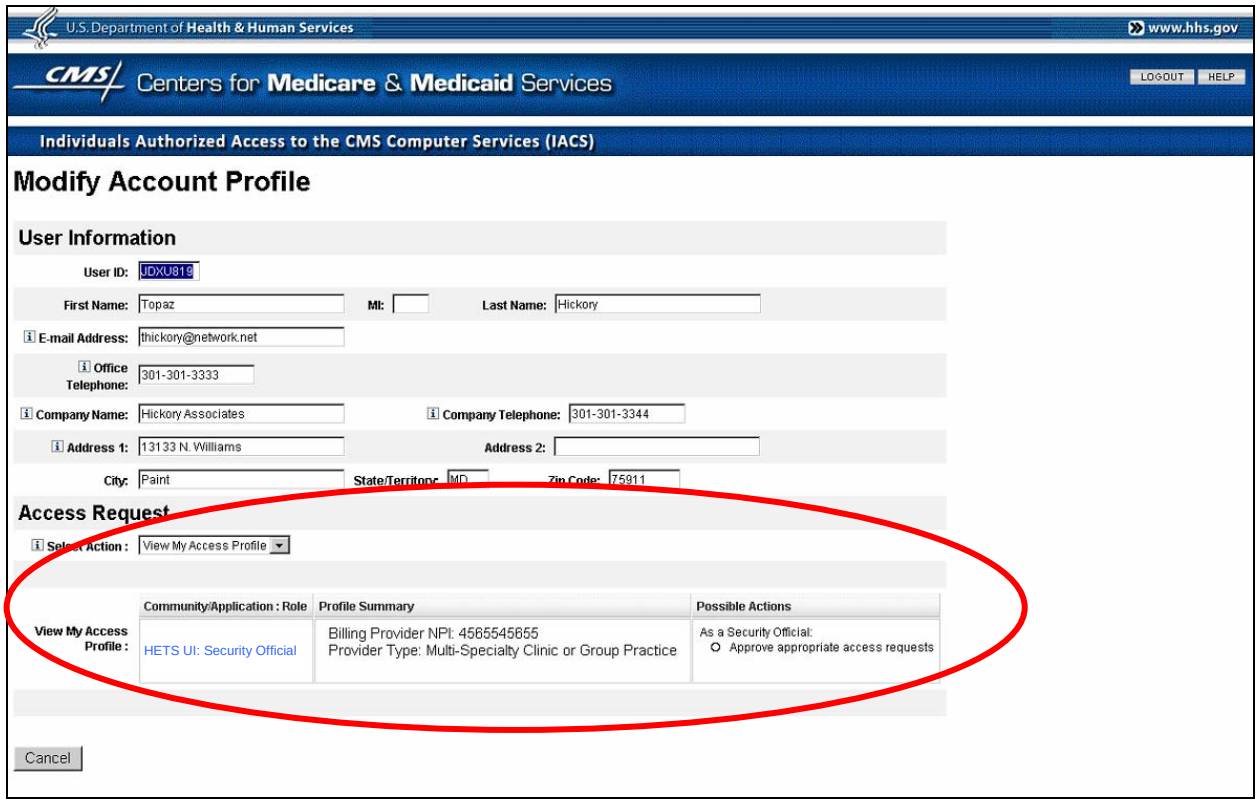


Figure D 33: Security Official – User Information Fields in Modify Account Profile

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 D 34.

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.

The *Select Action* field drop-down list provides the following actions for you to select from:

- **Modify HETS UI Profile –** Allows a HETS UI ***primary*** Security Official to modify his or her HETS UI account profile. Select this option if you want to add or remove physicians or contractors from the profile or change other organization information. For users in other HETS UI roles, selecting this option will allow you to view information about your role and organization. You cannot, however, make any changes to your HETS UI account profile. If this is the action you want to take, go to Section D 3.1.
- **Add Application –** This option is available to ***all*** HETS UI users and 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 option if you want to request access to applications other than HETS UI. If this is the action you want to take, go to Section D 3.2.

- **Add Community –** This option is available to ***all*** HETS UI users and 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 D 3.3.
- **View My Access Profile –** This option is available to all HETS UI users and 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 D 3.4.

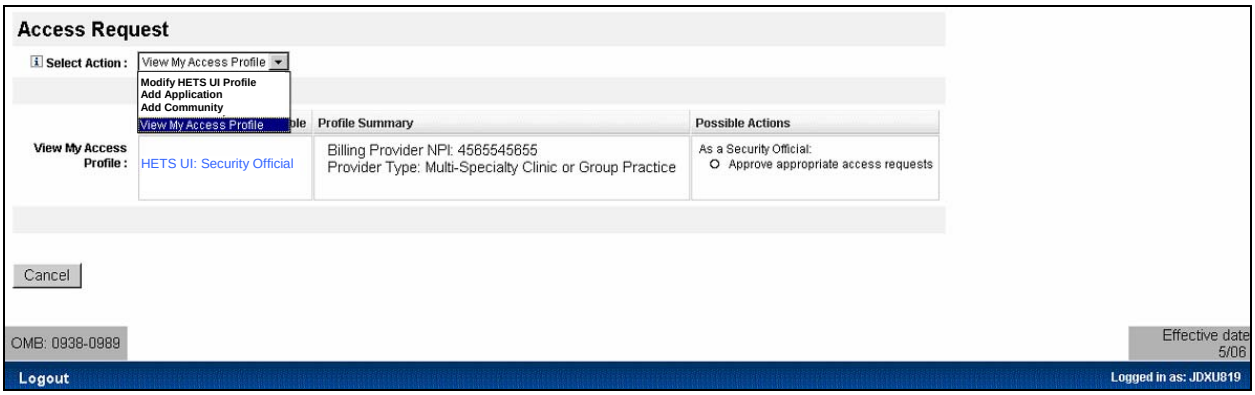


Figure D 34: Modify Account Profile – Select Action Drop-Down List

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

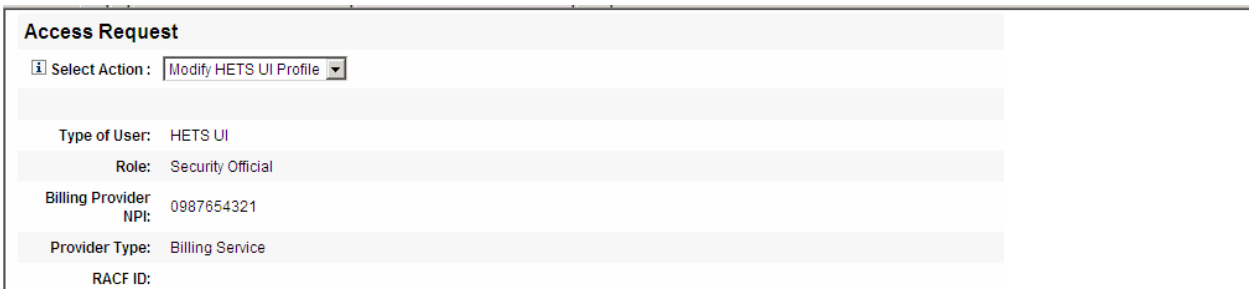
D 3.1 Modify HETS UI Profile

When you select the action of **Modify HETS UI Profile** and your role is that of **HETS UI Security Official** the screen will refresh and you will be presented with a screen similar to the example shown in Figure D 35.

In the ***Access Request*** portion of the screen, the small table showing your current application and role is no longer displayed. Your user type, role, Billing Provider NPI number, provider type, and RACF ID, if you have one, are displayed but ***cannot be modified***.

The fields of the EDI Registration Form are displayed and contain the information you entered during your new user registration process. These fields can be modified, and yo0u may add or delete physicians and/or contractors.

You can change the Legal Billing Name, Contact Name, Email address, Telephone number, and Fax number.



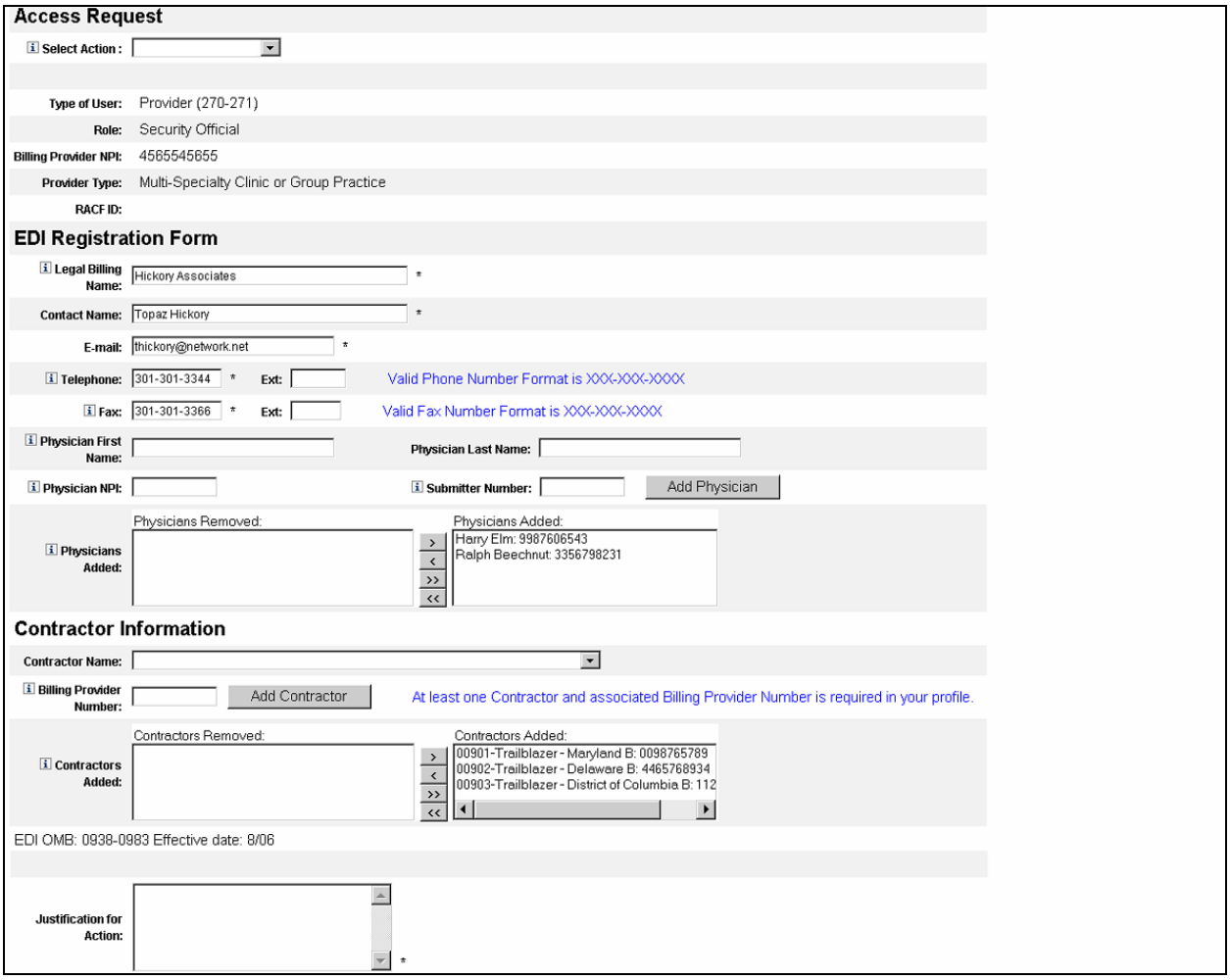


Figure D 35: Modify Account Profile Screen – HETS UI Security Official

Action: If necessary, change the ***Legal Billing Name*** of the Organization in the *Legal Billing Name* field.

Action: If necessary, change the ***Contact Name*** of an authorized contact person at this Organization in the *Contact Name* field.

Action: If necessary, change the business ***Email*** address of this contact person in the *Email* field.

Action: If necessary, change the ***Telephone*** number of this contact person in the *Telephone* field.

Action: If necessary, change the ***Fax*** number of the Organization in the *Fax* field.

Note: To **add a Physician**, do the following:

Action: Enter the ***Physician's First Name*** in the *Physician First Name* field.

Action: Enter the ***Physician's Last Name*** in the *Physician Last Name* field**.**

Action: Enter the ***Physician's NPI Number*** in the *Physician NPI* field.

Action: Enter the ***Physician's Submitter Number*** in the *Submitter Number* field, if applicable.

Action: Select the ***Add Physician*** button to record your entry.

The physician will be added to the list in the ***Physicians Added*** area. Repeat the above process to add additional physicians.

Note: To **remove a physician**, do the following:

Action: Highlight the name of the physician to be removed In the ***Physicians Added*** area.

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

The system will move the selected physician to the ***Physicians Removed*** area to the left.

You can reverse the process and move the physician back to the ***Physicians Added*** area by highlighting the physician's name and selecting the button with the right-facing arrow.

If you want to **remove all the physicians** in the ***Physicians Added*** area, select the button with the double left-facing arrow.

You can reverse the process and move all the physicians back to the ***Physicians Added*** area by selecting the button with the double right-facing arrow.

If you want to **add a Contractor**, do the following:

Action: Select the ***Contractor Name*** from the drop-down list in the *Contractor Name* field.

Action: Enter the ***Billing Provider Number*** in the *Billing Provider Number* field.

Action: Select the ***Add Contractor*** button to record each contractor and billing provider number entry.

The contractor will be added to the list in the ***Contractors Added*** box. Repeat the above process to add additional contractors.

If you want to **remove a contractor**, do the following:

Action: Highlight the name of the contractor to be removed In the ***Contractors Added*** area.

Note: The EDI Registration Form ***must contain at least one*** Contractor Name and Billing Provider Number.

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

The system will move the selected contractor to the ***Contractors Removed*** area to the left.

You can reverse the process and move the contractor back to the ***Contractors Added*** area by highlighting the contractor's name and selecting the button with the right-facing arrow.

If you want to **remove all the contractors** in the ***Contractors Added*** area, select the button with the double left-facing arrow.

You can reverse the process and move all the contractors back to the ***Contractors Added*** area by selecting the button with the double right-facing arrow.

When you have finished adding or removing contractors, continue the modify account profile process.

Action: Enter a brief justification statement for your request in the *Justification for Action* field. This field must list the changes you made to your account profile and the reason you are requesting them.

Note: No approval processing is required if the only modification you made to your profile was to remove physicians and/or contractors.

Action: Select the ***Next*** button when you have completed entering your justification statement.

When you select the ***Next*** button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure D 36.

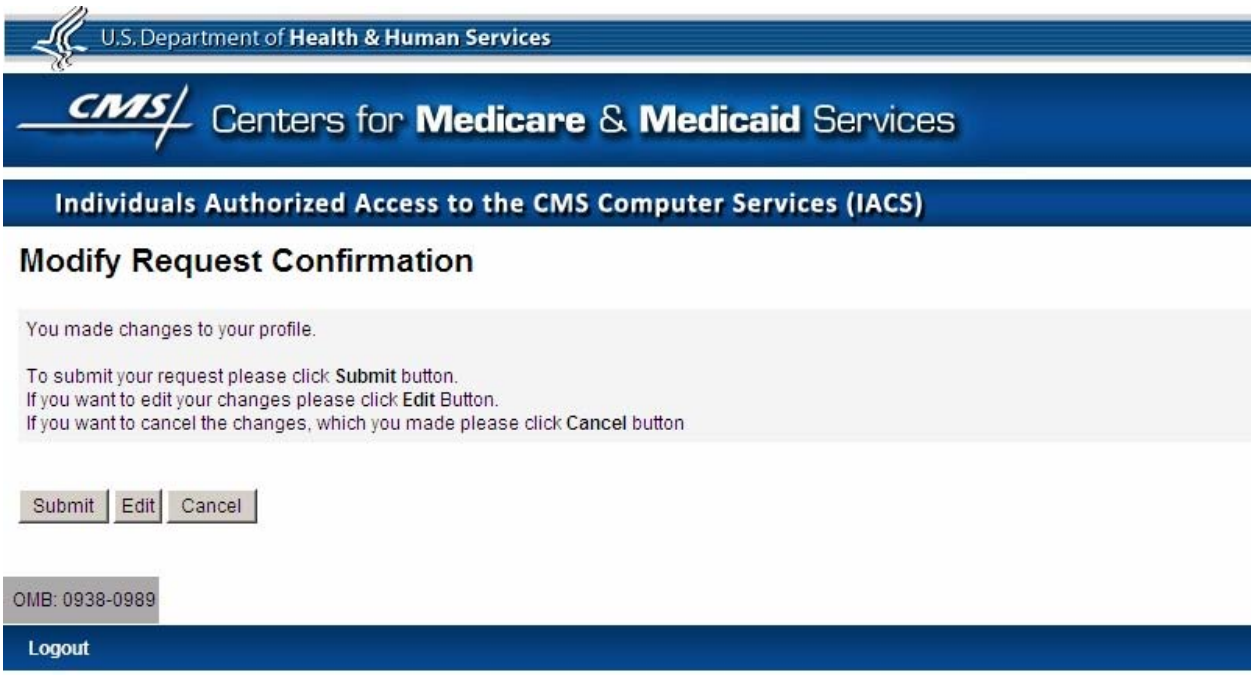


Figure D 36: Modify Request Confirmation Screen

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

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

- 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.

When you select the ***Submit*** button, a **Modification Request Acknowledgement** screen will display as illustrated in Figure D 37.

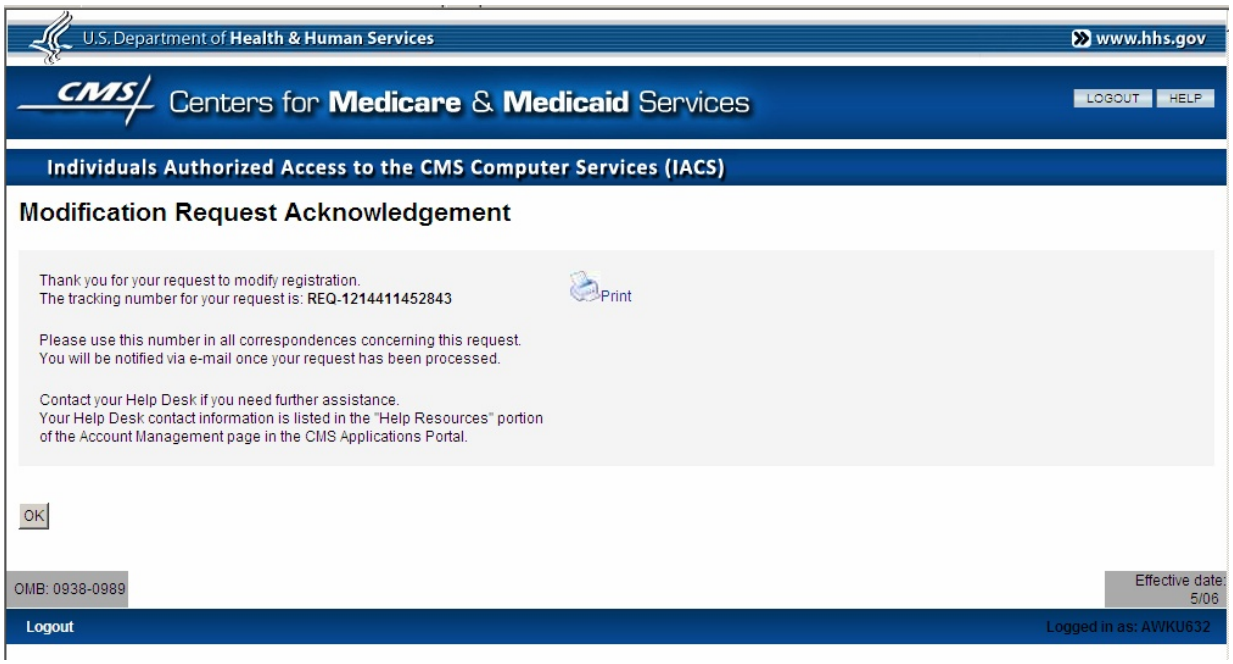


Figure D 37: IACS Modify Request Acknowledgement Screen

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.

D 3.1.1 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.

If your Role is that of **HETS UI User/Approver, HETS UI User/Provider,** or **MEIC Help Desk** there are no specifics for you to change using the ***Modify HETS UI Profile*** function.

If you select the ***Modify HETS UI Profile*** action, screen will refresh and display your user type, role, Billing Provider NPI number, provider type, and your RACF ID, if you have one. This information cannot be modified.

No action can be taken for these roles in the ***Modify HETS UI Profile*** functionality.

D 3.2 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 D 38. 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.

Note: This functionality is the same for ***all*** HETS UI roles.

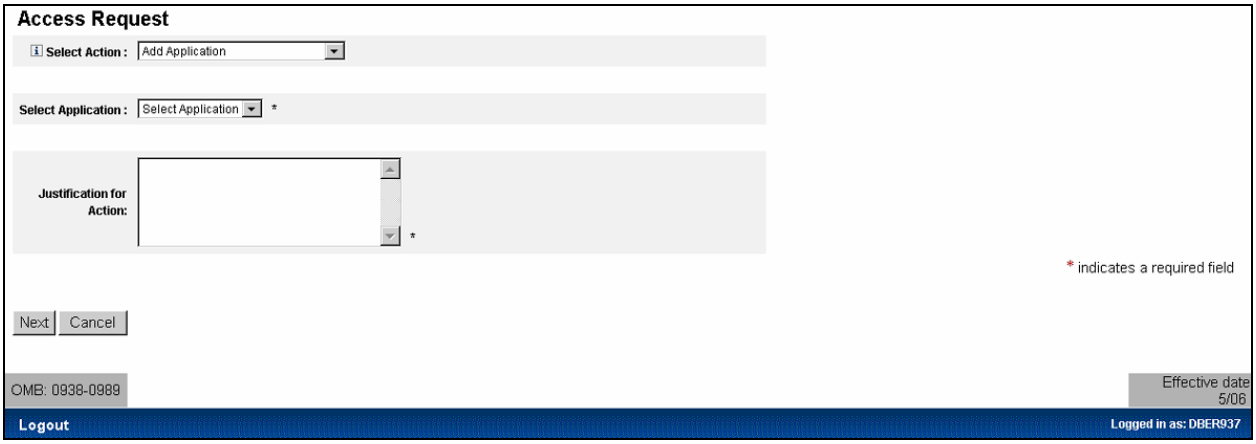


Figure D 38: Modify Account Profile – Add Application

The *Select Application* field has a drop-down list of the other CMS applications integrated with IACS as illustrated in Figure D 39.

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

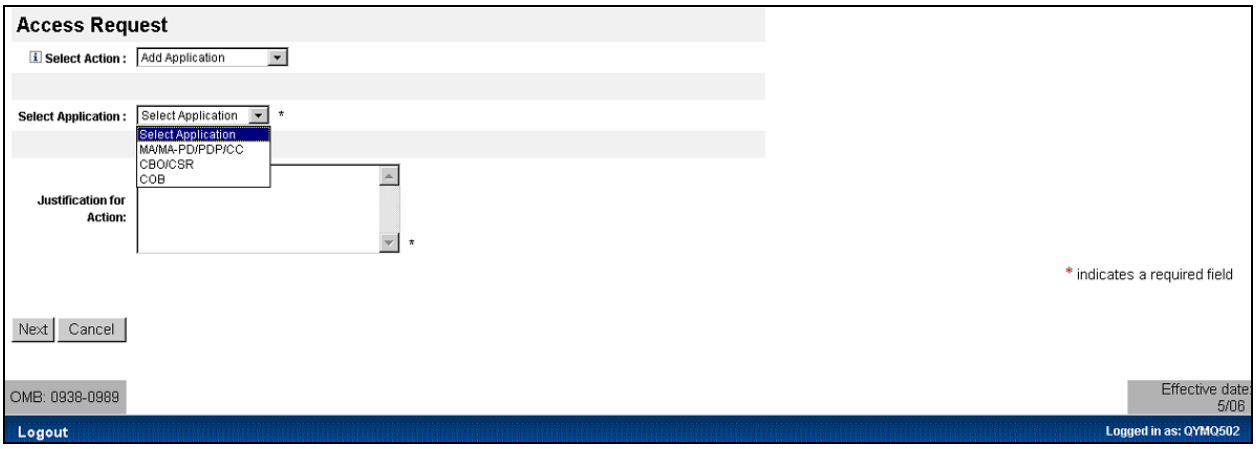


Figure D 39: Modify Account Profile Select Application Drop-down List

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 B – CBO/CSR –** Community Based Organization/Customer Service Representative
- **Attachment C – COB –** Coordination of Benefits – VDSA and COBA Organizations

D 3.3 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 D 40. 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.

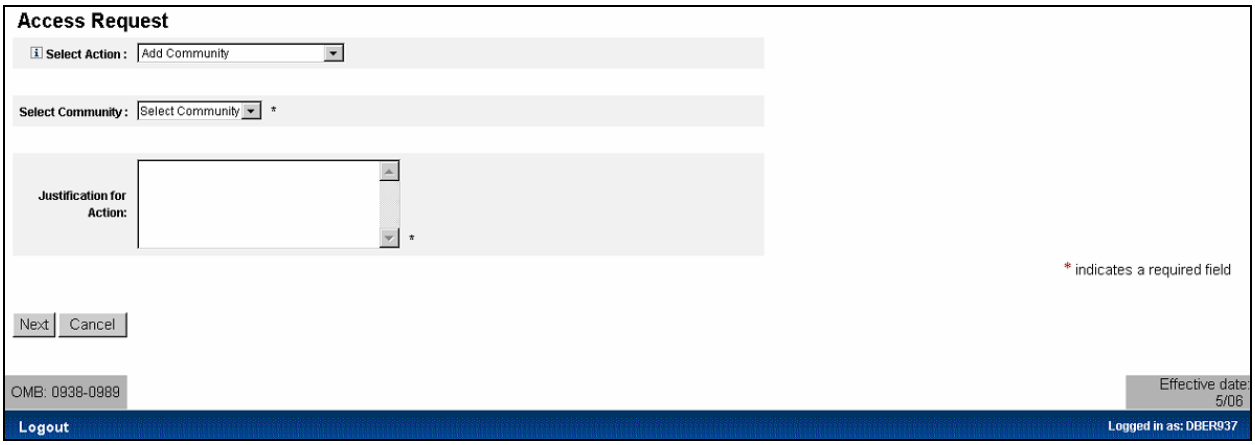


Figure D 40: Modify Account Profile - Add Community

The *Select Community* field has a drop-down list containing the available CMS user communities as illustrated in the example in Figure D 41.

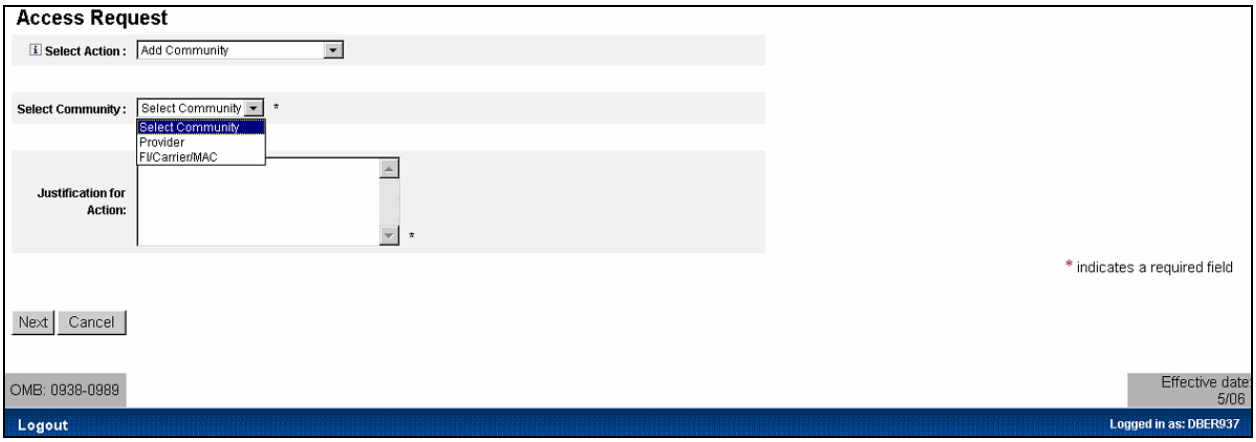


Figure D 41: Modify Account Profile Select Community Drop-down List

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**

D 3.4 View My Access Profile

With the **View My Access Profile** action selected, the screen will look similar to the example shown in Figure D 42. 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 for 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.

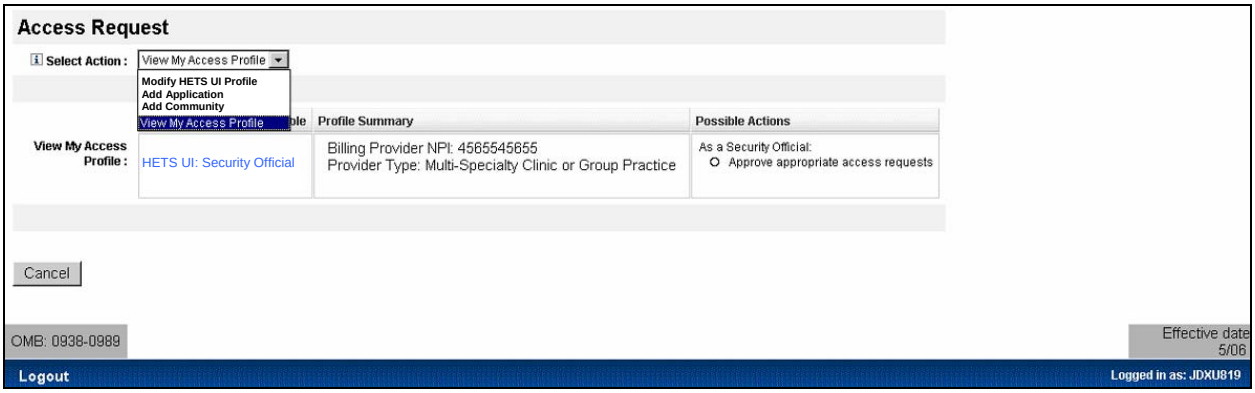


Figure D 42: Example of View My Access Profile Screen

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 D 43.

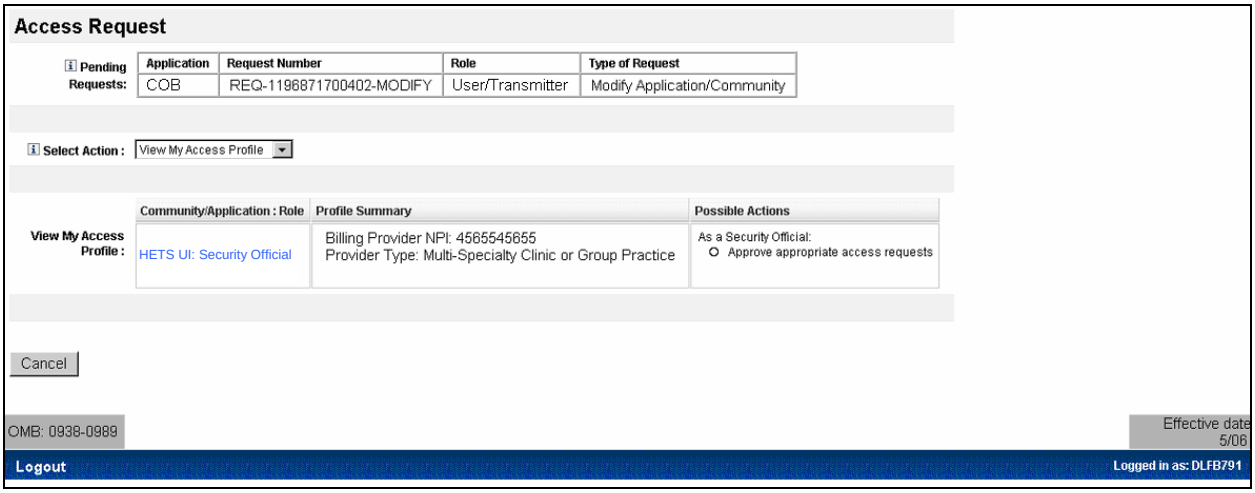


Figure D 43: Pending Requests Table in Modify Account Profile

D 4.0 Login to HETS UI

Once you have been approved and provisioned in IACS, you will want to access the screens for the plans you will be working on. 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 you 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 D 44.

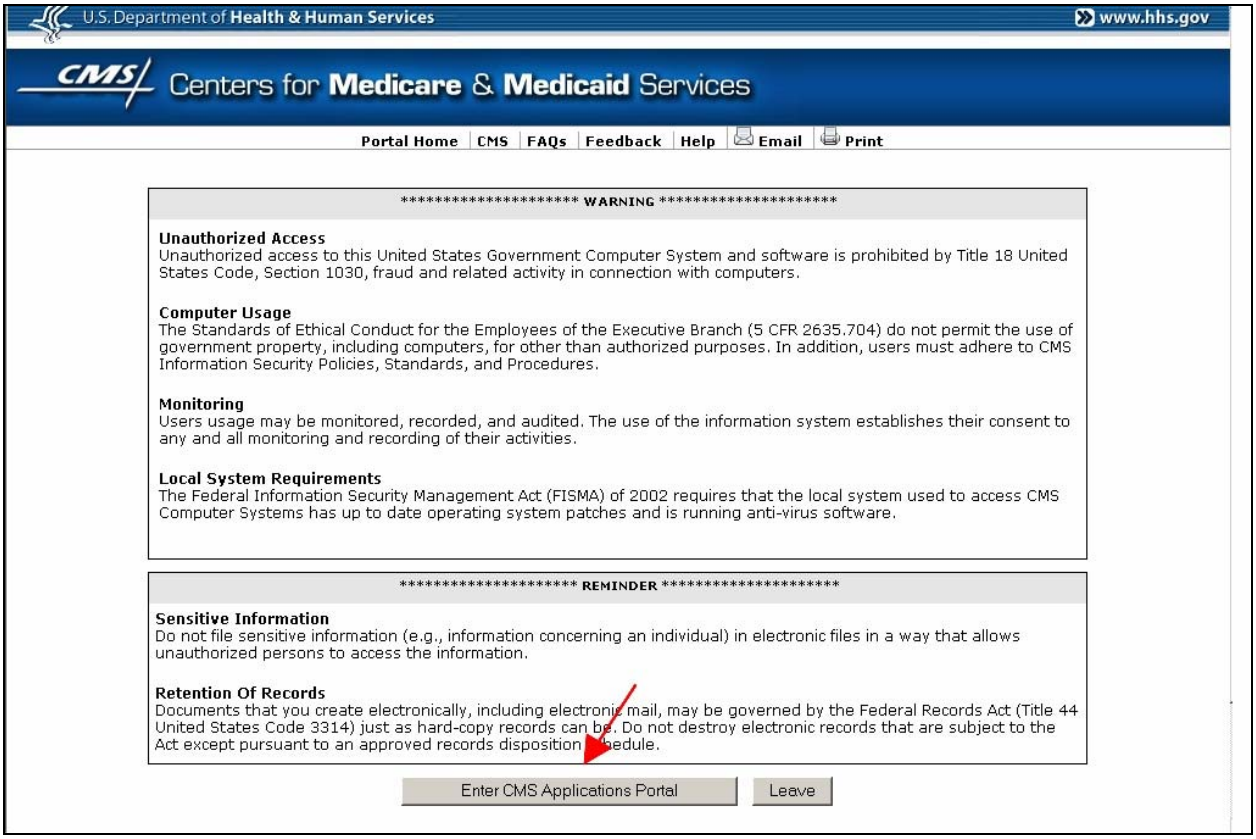


Figure D 44: CMS Applications Portal WARNING/REMINDER Screen

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

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

The **CMS Application Portal Introduction** screen will display as illustrated in Figure D 45.

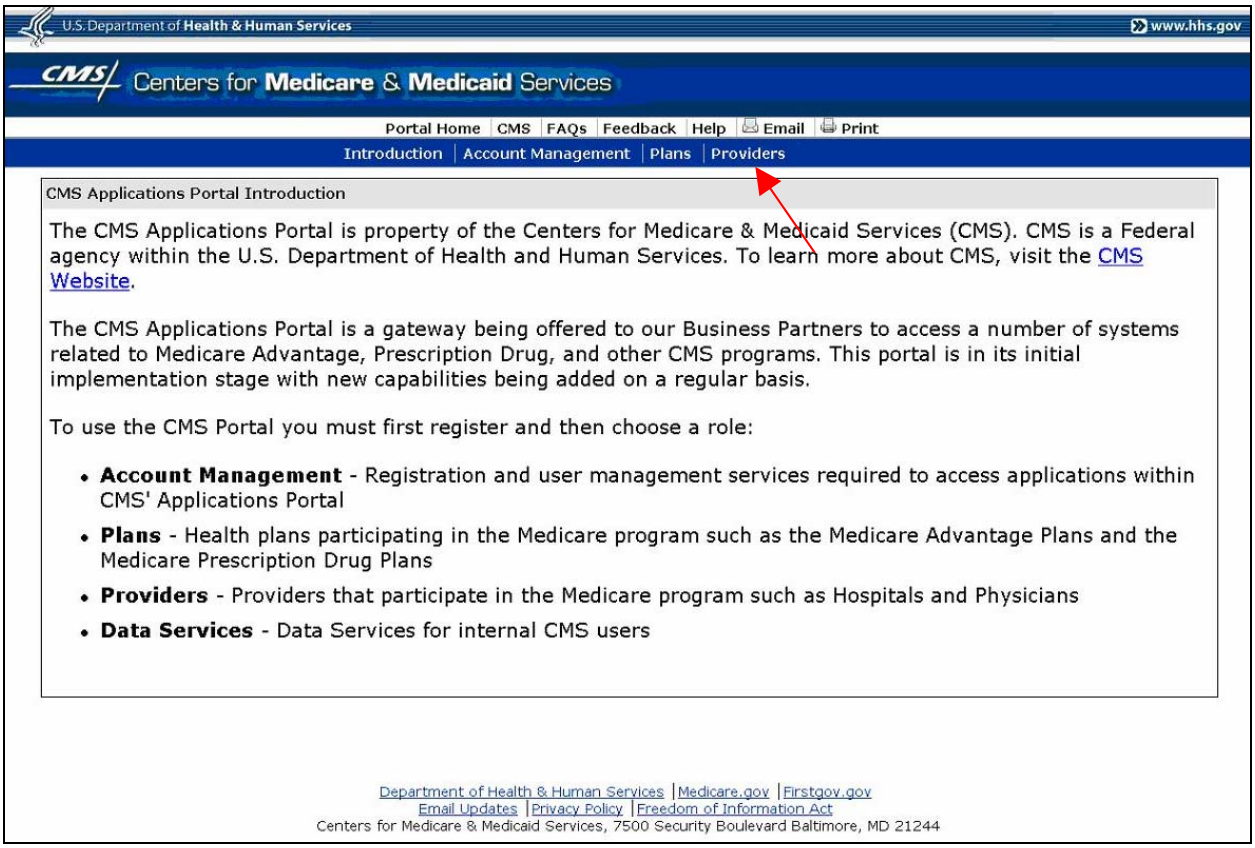


Figure D 45: CMS Applications Portal Introduction Screen

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

The screen will change to the **Providers** screen as illustrated in Figure D 46.

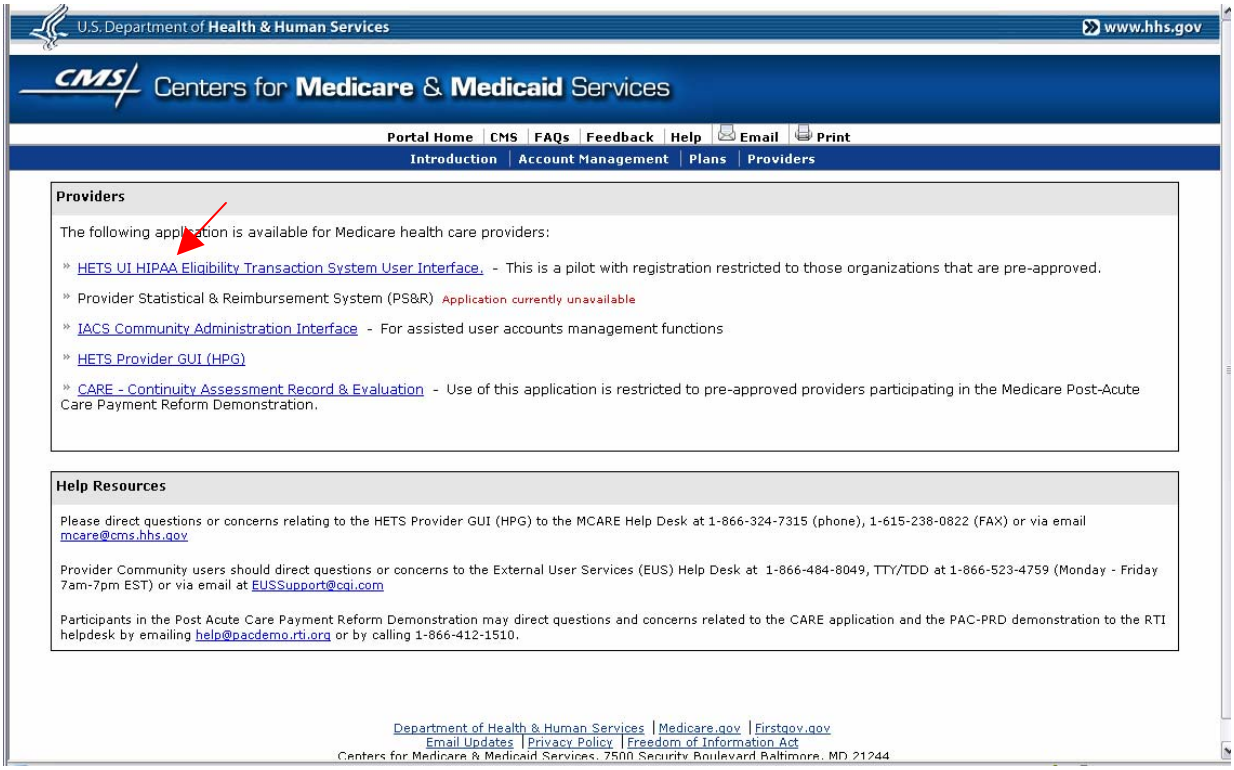


Figure D 46: Providers Screen

Action: Select the ***HETS UI HIPPA Eligibility Transaction System User Interface*** hyperlink.

The **Login to IACS** screen will display as illustrated in Figure D 47.

Figure D 47: 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. Instructions on how to use this function are provided in the IACS User Guide Main Body which can be found under General User Guides and Resources at: www.cms.hhs.gov/IACS .

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 your work.

End of Attachment D