

Individuals Authorized Access to the CMS Computer Services

(IACS) User Guide

Attachment F – Individual Practitioner

September 2008

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Important Note

This User Guide Attachment F and registration as an Individual Practitioner is intended for use by those Individual Practitioners who wish to register as ***sole providers***, i.e., only one IACS user in your practice will register to access CMS Provider applications integrated with IACS.

If your Organization expects to register more than one IACS user to access CMS Provider applications integrated with IACS, please refer to the ***IACS User Guide Attachment G*** and related ***Provider/Supplier Quick Reference Guides*** for your IACS registration and Account Management information and instructions.

Important Note, continued

The following definitions and organizational rules provide information and guidelines for Individual Practitioners wishing to register in the CMS **Provider/Supplier** User Community

- **Provider/Supplier Community** – This is the community for physicians, non-physician practitioners, institutional providers and suppliers, or representatives of one of those entities.
- **Fiscal Intermediary (FI) /Carrier / Medicare Administrative Contractor (MAC) Community** – Members of this community are employed directly or indirectly by a Fiscal Intermediary (FI), Carrier, or Medicare Administrative Contractor (MAC) as users of systems housed at an Enterprise Data Center (EDC).
- **Individual Practitioner** – This user is a physician or non-physician practitioner.
 - Any user requesting the role of **Individual Practitioner** must be verified as an enrolled Medicare Supplier within 180 days of registering in IACS.
 - Any user who has requested the role of **Individual Practitioner** may request an **additional role**, such as End User or User Group Administrator, in an Organization or User Group any time after receiving his or her IACS User ID. The request for an additional role must be approved by an authorized approver **before the user** can make changes to their account profile that impact this additional role (such as requesting access to additional CMS Applications).
 - If a user's **Individual Practitioner** verification as an enrolled Medicare Supplier **does not take place** within 180 days **and**:
 1. They have **not been approved** for another role in an Organization or User Group, their **Individual Practitioner** access in IACS will be disabled and any access to applications associated with that role will be removed.
 2. They **have been approved for another role** in an Organization or User Group, their IACS account will remain active to allow them to fulfill their Organization or User Group role (including access to applications required and approved for their additional role). However, their **Individual Practitioner** access in IACS will be disabled and any access to applications associated with that role will be removed.

F 1.0 Introduction

F 1.1 Purpose

This **IACS User Guide Attachment F** describes the procedures for registering and provisioning individual practitioners using the Individuals Authorized Access to CMS Computer Services, IACS, application within the Centers for Medicare & Medicaid Services, CMS, and making modifications to their IACS account profile after approval and provisioning.

F 1.2 Background

One of CMS' strategic goals is to streamline its information technology environment so that existing and new systems can effectively share information. This will allow CMS to be more responsive to the demands of changing business needs and take advantage of emerging technologies. CMS plans to make its data more readily accessible to beneficiaries, partners, and stakeholders in a secure, efficient, and carefully planned manner.

In striving to meet these goals, CMS has established a target enterprise architecture and modernization strategy that is based on several key design principles:

- An established, secure Internet architecture for the CMS enterprise
- Defined products for the target enterprise architecture
- Defined security classifications and controls for CMS applications
- Defined security services that support the architecture and implement the controls
- Prescriptive application development standards and guidelines for the target environment

Registering and provisioning users for the IACS system is fundamental to the design and implementation of business applications/systems planned for the CMS target enterprise architecture.

F 1.3 How to Use this User Guide

This **IACS User Guide Attachment F** provides screens and procedures to guide you through common IACS procedures such as:

- Accessing the New User Registration screens
- Completing the User Information and Contact information portion of the New User Registration screen
- Accepting or Declining the Privacy Act Terms and Conditions
- Completing the Registration process
- Logging into IACS for the first time
- Changing passwords
- Password reset when a user has forgotten their password
- User ID recall when a user has forgotten their User ID

- Requesting access to multiple applications integrated with IACS.

Additional screens and procedures that are particular to specific applications or user communities accessed through IACS are provided in accompanying IACS help document **Attachments** and **Quick Reference Guides**. They include such things as:

- Completing the Required Access portion of the New User Registration screen for other roles
- Modifying registration details for these roles after initial approval and provisioning.

F 1.4 *Formatting Conventions*

Wherever possible, the following formatting conventions have been used in all IACS help documents.

1. When an action is required on the part of the reader, it is indicated by a line beginning with the word **Action**:

Example:

Action: Select the **OK** button.

2. References to portions of screens displayed, and hyperlinks or buttons to be acted upon are indicated in ***bold italics*** in the **Action** statement.

Examples:

All available applications are listed in the ***New User Registration Menu for CMS Applications*** portion of the menu screen

Or

Select the ***Account Management*** hyperlink at the top of the screen.

Or

Select the ***Next*** button to continue.

3. Input fields are indicated in *plain italics*.

Example:

Enter your last name in the *Last Name* field.

4. Required input fields are indicated by an asterisk to the right of the field. These fields must be completed.
5. If you need help on completing an input field, some fields have help icons, to their left. This icon is displayed as a graphic: a small blue letter I inside a white box.
 - a. If you select this icon, a small information window opens overlaying the screen you are working on. This information window provides details about

the input field, such as the type of information being requested, the format in which to enter the data, or a definition of the field.

6. Screen names are indicated in **plain bold**.

Example:

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure 100.

F 1.5 Additional IACS Help Documents

This **IACS User Guide Attachment F** and other IACS help document **Attachments** and **Quick Reference Guides**, include information regarding new and/or modified IACS screens and functionalities up to and including Software Release 4.4.6, September 2008.

Note: All IACS help documents and computer-based training units discussed are also available in accessible, 508 compliant, versions.

Some highlights are:

- The IACS **Computer-Based Training, CBT**, menu has been expanded and new menu screens added as discussed in Section F 7.3. These new menu screens illustrate the CBT units that will shortly be made available. All CBT units are developed to walk users through a representative example of the process described and illustrate how to complete IACS tasks such as New User Registration, First Time Login, Modify Account Profile, etc.
- New user registration has been facilitated with the addition of the **New User Registration Menu** screen for CMS User Communities and Applications. When a new user selects the New User Registration hyperlink on the **Account Management** screen, this new menu screen will allow the user to select their desired user community or application prior to entering the IACS **New User Registration** screen.
- The **Account Management** screen contains a hyperlink to the **Forgot My User ID?** functionality.

Attachments have been added to the IACS help documentation to provide additional information and instructions for IACS users.

- **User Guide Main Body** – has been updated to include generic IACS functions for all roles.
- **A User Guide for Approvers** has been added for all levels of IACS approvers.
- **Attachment A. – MA/MA-PD/PDP/CC** – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts – has been added for additional information on all roles and modifications to IACS account profiles.

- **Attachment B – CBO/CSR** – Community Based Organization/Customer Service Representative – has been added for additional information on all roles and modifications to IACS account profiles.
- **Attachment C – COB** – Coordination of Benefits – has been added for additional information on all roles and modifications to IACS account profiles.
- **Attachment D – HETS UI** – HIPPA Eligibility Transaction System User Interface – has been added for additional information on all roles and modifications to IACS profiles.
- **Attachment E – DMEPOS Community** – Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Competitive Bidding System (DBidS) Community and Application – has been added for all roles of this community and modifications to their IACS account profiles.
- **Attachment F – Provider/Supplier – Individual Practitioner** – has been added for Individual Practitioners.
- **Attachment G – Provider/Supplier and FI/Carrier/MAC Communities** – has been added for all roles of these communities and modifications to their IACS account profiles.

Existing Quick Reference Guides have been updated and new Quick Reference Guides have been added to the IACS help documentation. A current listing of the available Quick Reference Guides follows below:

For all CMS Applications and User Communities:

- **IACS Approver**

For Provider/Supplier and FI Carrier/MAC User Communities:

- **IACS New User Registration – Security Official**
- **IACS New User Registration – Backup Security Official**
- **IACS New User Registration – User Group Administrator**
- **IACS New User Registration – End User**
- **IACS New User Registration – Individual Practitioner**
- **IACS Request Access to a CMS Application – for Individual Practitioners, Organization Users, and Surrogate Users**

For the DMEPOS Community – Durable Medical Equipment, Prosthetics, Orthotics & Supplies Competitive Bidding System (DBidS) Community and Application CMS User Community:

- **IACS New User Registration – DMEPOS Authorized Official**

- **IACS New User Registration – DMEPOS Backup Authorized Official**
- **IACS New User Registration – DMEPOS End User**

F 1.6 *IACS Screen Information*

Every effort has been made to keep the screen shots in this document up to date; however, there may be minor differences between on-screen text and what is shown in the figures in this User Guide Attachment. These differences should not affect your ability to request desired accesses or perform desired activities.

F 2.0 IACS Registration

The following subsections provide step by step instructions on how to apply for an IACS user account using the IACS New User Registration procedures.

Once you have an IACS user account, you can use IACS to modify your account profile to request access to various CMS Applications integrated with IACS and available to the Provider/Supplier & FI/Carrier/MAC Communities and/or request access to additional CMS User Communities.

F 2.1 Accessing IACS New User Registration

The following steps and screens show you how to begin your new user registration in 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 F 1.

Figure F 1: CMS Applications Portal WARNING/REMINDER Screen

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

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

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

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

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

End of figure.

Action: Read the important information on this screen and indicate your agreement by selecting the **Enter 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 F 2.

Figure F 2: CMS Applications Portal Introduction Screen

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

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

Introduction, this is the current screen
Account Management, a hyperlink to registration and user management services required to access applications within C M S's Applications Portal
Plans, a hyperlink to Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
Providers, a hyperlink to Providers that participate in the Medicare program such as Hospitals and Physicians

End of figure.

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

The **Account Management** screen will display as illustrated in Figure F 3.

Hyperlinks on this screen will allow users to access IACS registration, login functions, and the IACS Community Administration Interface.

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

Figure F 3: Account Management Screen

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

The hyperlinks on the Account Management screen are:

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

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

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

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

IACS Community Administration Interface, which will allow you to access assisted user accounts management functions.

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

End of figure.

Action: Select the ***New User Registration*** hyperlink.

The **New User Registration Menu** screen will display as illustrated in Figure F 4.

Figure F 4: IACS New User Registration Menu Screen

The figure displays the New User Registration Menu screen.

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

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

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

End of figure.

Action: Select the *Provider/Supplier Community* hyperlink.

A **Terms and Conditions** screen will display as illustrated in Figure F 5.

Figure F 5: Terms and Conditions – Privacy Act Statement Screen

The figure displays the Terms and Conditions, C M S Computer Systems Security Requirements, screen with the Privacy Act Statement text.

The screen features and navigation buttons are explained in detail in this help document.

End of figure.

Action: Read all of the **Privacy Act Statement** by moving down as needed through all of the text.

Action: Select the **Print** icon to the right of the text if you want to print this information.

Action: Select the **I Accept the above Terms and Conditions** box.

Action: Select the **I Accept** button.

Note: If you select **I Decline**, a small window will appear for you to confirm your decision to decline. If you confirm your decision, your New User Registration session is cancelled and a screen indicating this is displayed. You must select the **OK** button to exit that screen. The system will then return you to the **CMS Applications Portal Introduction** screen.

When you select the **I Accept the above Terms and Conditions** box and the **I Accept** button in the **Terms and Conditions** screen, the system will display a **New User Registration, Role Selection** screen as illustrated in the example in Figure F 6.

F 2.2 New User Registration - Individual Practitioner Role Selection

On the **New User Registration, Role Selection** screen users will be able to select their desired role.

Figure F 6: New User Registration - Role Selection Screen

The figure displays the New User Registration, Role Selection screen.

The screen lists the available roles, with a text description of each, that currently exist in the Provider user community. Each role has a radio button to the left. A note at the top of the screen instructs the user to select his or her role.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

Action: Select the radio button to the left of the ***Individual Practitioner*** role.

Action: Select the ***Next*** button.

A role-specific **Terms and Conditions** screen will display as illustrated in Figure F 7. This screen presents the terms and conditions for the Individual Practitioner role that you have selected. You must accept the terms and conditions for that role in order to proceed with the registration process.

Figure F 7: Individual Practitioner – Terms and Conditions Screen

The figure displays the Terms and Conditions for the role selected on the role selection screen. The example in the figure is that of the terms and conditions for the Individual Practitioner. The text will be specific to the role selected.

The screen features and navigation buttons are explained in detail in this help document.

End of figure.

Action: Read all of the text on the screen moving down the screen as needed.

Action: Select the *Print* icon to the right of the text if you want to print this information.

Action: Select the *I Accept the above Terms and Conditions* box.

Action: Select the *I Accept* button.

Note: If you select the *I Accept* button without selecting the *I Accept the above Terms and Conditions* box, a message will appear at the top of the screen indicating you must select the box to proceed any further.

Note: If you select the *I Decline* button, a small window will appear with a message asking you to confirm your decision to decline. If you confirm your decision, your registration session is cancelled and a screen indicating this is displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **Account Management** screen illustrated in Figure F 3.

If the role presented in a **Terms and Conditions** screen is not correct, select the *Back* button to return to the **New User Registration – Role Selection** screen as illustrated in Figure F 6 and select the correct role.

After you accept the Individual Practitioner - Terms and Conditions, the **New User Registration** screen will display as illustrated in Figure F 8.

F 2.3 Entering User Information

After you select the *I Accept the above Terms and Conditions* box and the *I Accept* button in the **Terms and Conditions** screen for your selected role, the system will display a **New User Registration** screen with a *User Information* section requiring your input. This screen is illustrated in Figure F 8.

Note: Required fields are indicated by an asterisk (*) to the right of the field.

Figure F 8: New User Registration Screen – User Information

The figure displays the New User Registration screen with the User Information portion and its entry fields. These fields are explained in this help document.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

Action: Complete the required fields in the **User Information** portion of the screen. You may complete the optional fields as well.

- The First and Last Name must be those on file with the Social Security Administration (SSA).
- The Social Security Number (SSN) must be unique and must be the one on file with the Social Security Administration.
- The Date of Birth must be the one on file with the Social Security Administration.
- A unique, work related email address where you may be contacted is required.
- Enter your email address a second time for verification. Do not cut and paste from one field to the other.

Note: The information must be entered in the fields in the formats specified on the screen.

Action: Select the **Next** button when you have completed all the required fields.

When you select the **Next** button, the system validates the data you have entered.

- Your name, SSN, and Date of Birth are validated against data on file at the Social Security Administration (SSA).
- Additionally, the system verifies that the SSN you entered does not already exist in an IACS account.
- Your email address is validated to verify that it does not already exist in an IACS account.

If you select the **Cancel** button, your request is cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window.

If your User Information data is **successfully** validated on the first validation attempt, the **Email Address Verification** screen will display as illustrated in Figure F 12. Please go to the **Validation Success** subsection now.

If your User Information data **fails validation** or the validation system is unavailable on the first validation attempt, you will be given two additional opportunities to correct the data in your *User Information* fields. This means that IACS can only attempt to validate your information with the SSA three times. Please review the information in the following **Validation Failure** subsections for more information on validation failures. In the case of system unavailability, you will be presented with a warning message on the screen with instructions to try again later.

F-2.3.1 Validation Failure - First Attempt

If your User Information data **fails validation** on the first attempt, the **New User Registration** screen will refresh and display a message under the *Email* address field as illustrated in Figure F 9.

Figure F 9: Validation Failure Message – First Attempt

The figure displays the New User Registration screen with the User Information entry fields populated. The figure displays a warning message you will receive after the first failed attempt to validate your information. The text of the warning message is as follows:

Your details cannot be validated against the social security administration. Please ensure that correct details are entered above and click next. After three failed attempts your registration will be cancelled.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

Action: Review the User Information you have entered for correctness.

Action: Make any needed changes to your User Information.

Action: Select the **Next** button when you are done.

When you select the **Next** button the system will attempt to validate the SSA data again. If a problem is encountered again, a set of questions will appear on the screen as shown in the example in Figure F 10.

F-2.3.2 Validation Failure – Second Attempt

If your User Information data **fails validation** on the second attempt, the **New User Registration** screen will refresh and display two simple questions for you to answer as

illustrated in Figure F 10. These questions are being asked to ensure that the registration request is not being generated by an automated system.

Figure F 10: Validation Failure Message – Second Attempt with Questions

The figure displays the New User Registration screen with the User Information entry fields populated. The figure displays two questions with a message that says the following:

You have been presented with two simple validation questions because the details you entered could not be validated against the social security administration. Please provide correct answers and click next.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

Action: Correct the *User Information* you have entered.

Action: Answer both questions correctly.

Note: Do not use numeric characters to answer the questions. Spell out any number answer, for example, do not use the number 4, spell it out as a word, four.

Action: Select the **Next** button.

The system will attempt to validate ***both your user information and the answers to the questions.***

If either fails validation, the screen will refresh and display the appropriate warning message under the *Email* address field. The warning message illustrated in the example in Figure F 11 is for incorrect answers to the two simple questions. The warning message that displays if your User Information fails validation is illustrated in Figure F 9.

Figure F 11: Validation Warning message – Invalid Question Answers

The figure displays the New User Registration screen with the User Information entry fields populated. The figure displays two questions with incorrect answers entered. A warning message is displayed which says the following:

The answers to the simple validation questions are not correct. Please provide correct answers to the questions. After 3 failed attempts, the registration will be cancelled.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

Action: Correct the **User Information** you have entered.

Action: Answer both questions correctly.

Note: Do not use numeric characters to answer the questions. Spell out any number answer, for example, do not use the number 4, spell it out as a word, four.

Action: Select the **Next** button.

Note: If either your User Information or the answers to the questions fails validation this second time, ***your registration will be cancelled.***

Note: If your SSA data cannot be validated, please contact your local SSA office for assistance. SSA contact information can be found at: <http://www.ssa.gov/>

If your User Information data is **successfully** validated, the **Email Address Verification** screen will display as illustrated in Figure F 12.

F-2.3.3 Validation Success

If your User Information data is **successfully** validated, the **Email Address Verification** screen will display as illustrated in Figure F 12.

Figure F 12: Email Address Verification Screen

The figure displays the email address verification screen that contains information about the email verification process and an input field labeled Verification Code. There is also a hyperlink to the right of this entry field labeled, resend verification code. The details of this screen are explained in this help document.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

You will be sent an email confirming that IACS has received your request and providing you with a Verification Code number that you must enter in the *Verification Code* field on the **Email Address Verification** screen. A sample email is illustrated in Figure F 13.

Action: Leave the **Email Address Verification** screen **open**.

Note: You must leave the **Email Address Verification** screen open while you obtain your *Verification Code* from your email.

Action: Go to your email Inbox and open the message with your verification code. The email subject line will be: **Email Address Verification**.

Note: If you do not receive the verification email, select the **Re-send Verification Code** hyperlink to the right of the *Verification Code* field on the **Email Address Verification** screen. You may ask to have it resent up to 3 times. Contact your Help Desk if you need assistance or do not receive the Email Address Verification email.

Figure F 13: Example of Email Address Verification Email

The figure displays a sample email. The text of the email is as follows:

You are receiving this email in response to a Registration request being submitted by you in IACS. Please enter the following code in the Registration window to complete verification and proceed with your request.

Verification Code: <your code appears here>

Thank you,
IACS

Please do not reply to this system-generated email.

End of figure.

Action: Write down your *Verification Code*.

Note: You will have **30 minutes to complete this step of the registration process**. If you do not complete this step in 30 minutes, your request will be cancelled and all the information you have entered will be lost.

Note: If you select the **Cancel** button, your application request will be cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **CMS Applications Portal Introduction** screen illustrated in Figure F 2.

Action: Return to the **Email Address Verification** screen.

Figure F 14: Email Address Verification Screen

The figure displays the email address verification screen that contains information about the email verification process and an input field labeled Verification Code. There is also a hyperlink to the right of this entry field labeled, resend verification code. The details of this screen are explained in this help document.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her registration, and a cancel button which will delete any information entered on this screen and cancel the registration request.

End of figure.

Action: Enter the **Verification Code** in the *Verification Code* field on the **Email Address Verification** screen illustrated in Figure F 14.

Note: You must enter the code exactly as it is displayed in the email message without any extra spaces or characters.

Action: Select the **Next** button.

Note: If, after four attempts, you have not entered your email verification code correctly, your IACS registration request will be cancelled and you must start a new request.

When you enter the correct verification code and select the **Next** button on the **Email Address Verification** screen, the screen will refresh and the **New User Registration** screen will display as illustrated in Figure F 15. This screen has additional sections for you to complete.

F 2.4 Entering Professional Contact Information

The top portion of the **New User Registration** screen illustrated in Figure F 15 contains the *User Information* fields you have previously seen with the data you entered pre-populated in those fields you completed. This data cannot be changed.

The center of the screen contains an area labeled **Professional Contact Information**. In this portion of the screen, IACS requires you to enter information on where you can be contacted on a professional basis.

At the bottom of the screen, the area labeled **Access Request** displays your *Community Type*: **Provider/Supplier** and your *Role*: **Provider Individual Practitioner**.

Figure F 15: New User Registration Screen – Professional Contact Information

The figure displays the New User Registration screen that will display for all users after they have entered their email verification code on the email verification code screen.

The screen displays the user information portion with the information entered by the user as well as additional input portions for the user to complete. How to complete these are explained in this help document.

End of figure.

Action: Enter your professional contact information in the fields provided in the **Professional Contact Information** portion of the **New User Registration** screen.

Note: All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field.

Note: If you need help or have questions, please contact the Help Desk associated with the **Provider/Supplier** Community.

This Help Desk is the External User Services, EUS, Help Desk. The phone number is 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their email address is EUSupport@cgi.com. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may be contacted at Post Office Box 792750, San Antonio, Texas, 78216.

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 Professional Contact information 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.

Note: If you select the **Cancel** button, your application request will be cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **CMS Applications Portal Introduction** screen illustrated in Figure F 2.

F 2.5 Completing Your Registration

If the data entered during the registration process is valid and all the 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. An example of this screen, the **Review Registration Details**, is illustrated in Figure F 16.

Figure F 16: Review Registration Details Screen

The figure displays the Review Registration Details screen.

The screen displays the user's registration information so that the user can check it for accuracy.

The screen has three navigation buttons at the bottom of the screen; a submit button which sends the registration information to IACS for processing, an edit button which allows the user to return to the previous screen and edit their input, and a cancel button which will delete any information entered and cancel the registration request.

End of figure.

Action: Select the **Submit** button when you are satisfied that your registration information is correct. A **Registration Acknowledgement** screen will display as illustrated in Figure F 17.

- Select the **Edit** button if there is professional contact information you want to modify. The **New User Registration** screen will be redisplayed with all your information populated in the appropriate fields. You may modify the information that you want

and, when you are done, select the **Next** button. You will again be presented with the **Review Registration Details** screen.

Note: The **User Information** data has already been validated and **cannot be edited**.

- If you select the **Cancel** button, your application request will be cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **CMS Applications Portal Introduction** screen.

Figure F 17: Registration Acknowledgement Screen

The **Registration Acknowledgement** screen indicates your registration request has been submitted successfully 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 **Registration Acknowledgement** screen by selecting the **Print** icon.

Action: Select the **OK** button.

Note: Your registration will not be completed unless the **OK** button is selected.

The **Registration Acknowledgement** screen and browser window will close and, the system will return you to the **Account Management** screen as illustrated in Figure F 3.

F 2.6 After Completing Your Registration

After you complete your IACS New User Registration, 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 need to contact your Help Desk regarding your request. This email is illustrated in Figure F 18.

If this email notification is not received within 24 hours after you register, please contact the External User Services (EUS) Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at EUSSupport@cqi.com.

Please have your request number from the Registration Acknowledgement screen available when you call EUS. If you email EUS, please include the request number.

Figure F 18: Example of Request Number Email

The figure displays a sample email. The text of the email is as follows:

Please use the following Request Number when contacting CMS regarding your request.

Request #: REQ-<your request number will appear here>.

Your request has been received by the Individual Authorized Access to the CMS Computer Services (IACS).

Please do not reply to this system-generated email.

End of figure.

Once your account has been created, two separate email messages will automatically be sent to you.

1. The first (**Subject: FYI: User Creation Completed – Account ID Enclosed**) will contain your IACS User ID. This email is illustrated in Figure F 19.
2. The second (**Subject: FYI: User Creation Completed – Password Enclosed**) will contain the format of your initial password. You will be required to change your initial password the first time you login. This email is illustrated in Figure F 20.

Figure F 19: Example of User ID Email

The figure displays a sample email that is sent to the user to deliver his User ID reminder. The text reads as follows:

Request for access to a Centers for Medicare & Medicaid Services' system has been approved

The tracking number of your request is REQ--<your request number will appear here>

To access the CMS Internet applications, use the following User ID: AAAAnnn

Thank you,
IACS

Please do not reply to this system generated email.

End of figure.

Note: The User ID will be in the following alphanumeric format **AAAAAnnn**, where **AAAA** are letters, and **nnn** are numbers.

Figure F 20: Example of a Temporary One-time Password Email

The figure displays the text of the password notification email which says the following:

Your temporary one-time password is -<your password will appear here>.
Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>
Read the privacy statement and click the Enter CMS Applications Portal button.

Select the Account Management link on the menu bar, and then the my profile link.

Login to IACS using your User ID and password to change your password.

Thank you,
IACS

Please do not reply to this system-generated email.

End of figure.

Action: Go to the **First Time Login to IACS** Section in this User Guide Attachment and follow the steps for logging in and changing your password.

F 3.0 First Time Login to IACS

When you are ready to login to IACS for the first time, please take the following actions:

Action: Using your IACS User ID and your temporary, one-time password that were sent to you by email, login to the IACS system starting at <https://applications.cms.hhs.gov> on the CMS website.

Action: Read the contents of the **CMS Applications Portal WARNING/REMINDER** screen, and agree by selecting the **Enter CMS Applications Portal** button. You can refer to Figure F 1 for an illustration of this screen.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure F 21.

Figure F 21: CMS Applications Portal Introduction Screen

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

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

Introduction, this is the current screen
Account Management, a hyperlink to registration and user management services required to access applications within C M S's Applications Portal
Plans, a hyperlink to Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
Providers, a hyperlink to Providers that participate in the Medicare program such as Hospitals and Physicians

End of figure.

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

The screen will refresh and display the **Account Management** screen as illustrated in Figure F 22.

Figure F 22: Account Management Screen

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

The hyperlinks on the Account Management screen are:

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

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

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

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

IACS Community Administration Interface, which will allow you to access assisted user accounts management functions.

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

End of figure.

Action: Select the ***My Profile*** hyperlink on the **Account Management** screen.

The **Login to IACS** screen will display as illustrated in Figure F 23.

Figure F 23: Login to IACS Screen

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

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

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

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

End of figure.

Action: Enter your new *User ID*.

Action: Enter your temporary, one-time *Password*.

Action: Select the *Login* button.

F 3.1 Change Password

The **Change Password** screen illustrated in Figure F 24 will display. This screen will also display when you login after a password reset.

Figure F 24: Change Password Screen

The figure displays the change password screen. There is a new password field followed by a confirm new password field. Underneath that is the CMS Password Policy which is explained in detail in this help document.

End of figure.

Action: Enter a new password in the *New Password* field.

Action: Re-enter it in the *Confirm New Password* field as verification.

Action: Select the *Change Password* button.

Note: The system will validate the composition of the password you entered before proceeding to the next screen. If the password you entered complies with CMS Password Policy, the **My Profile** screen will redisplay as illustrated in Figure F 26.

Your IACS password must conform to the following CMS Password Policy:

- The password must be 8 characters long.
- The password must contain at least two letters and one number (no special characters).
- Letters must be mixed case. Your password must have at least one upper case and one lower case letter.
- The password must not contain your User ID.
- The password must not contain 4 consecutive characters of any of your previous 6 passwords.
- The password must be different from your previous 6 passwords.

Note: Passwords cannot begin with a number.

In addition:

The password must not contain any of the following reserved words or number combinations: PASSWORD, WELCOME, CMS, HCFA, SYSTEM, MEDICARE, MEDICAID, TEMP, LETMEIN, GOD, SEX, MONEY, QUEST, 1234, F20ASYA, RAVENS, REDSKIN, ORIOLES, BULLETS, CAPITOL, MARYLAND, TERPS, DOCTOR, 567890, 12345678, ROOT, BOSSMAN, JANUARY, FEBRUARY, MARCH, APRIL, MAY, JUNE, JULY, AUGUST, SEPTEMBER, OCTOBER, NOVEMBER, DECEMBER, SSA, FIREWALL, CITIC, ADMIN, UNISYS, PWD, SECURITY, 76543210, 43210, 098765, IRAQ, OIS, TMG, INTERNET, INTRANET, EXTRANET, ATT, LOCKHEED

If the **Change Password** screen *reappears*, a password policy violation has occurred. Read the warning message that is displayed at the top of the screen, as illustrated in Figure F 25, and proceed accordingly.

Examples of password policy violation messages:

- Password does not comply with CMS Password Policy. Minimum length is 8. New password cannot contain more than 4 characters in sequence that are in any of the previous 6 passwords for this account.
- A new password cannot match any of the 6 previous passwords for this account.
- The **Confirm Password:** and **Password:** fields do not match.
- Passwords must have at least 2 alpha characters.
- Passwords must have at least 1 upper case and 1 lower case alpha character.
- Passwords must have at least 1 numeric character.

- Passwords cannot begin with a number.
- Passwords must be 8 characters in length.

Note: You must change your password at least every 60 days, per CMS Password Policy.

Figure F 25: Change Password Policy Violation Message Screen

The figure displays the Change Password screen with a warning message which is displayed when your password does not meet the password policy guidelines. The message reads: Password does not comply with CMS Password Policy. Minimum length is 8. New password cannot contain more than 4 characters in sequence that are in any of the 6 previous passwords for this account.

End of figure.

Action: Enter a new password in the *New Password* and *Confirm New Password* fields.

Action: Select the ***Change Password*** button.

F 3.2 Change Answers to Authentication Questions

After you have successfully changed your password, the **My Profile** screen will redisplay as illustrated in Figure F 26.

Figure F 26: My Profile Screen with Change Answers to Authentication Questions Hyperlink

The figure displays the My Profile screen with a welcome message directing the user to select the only hyperlink on the screen, Change Answers to Authentication Questions.

End of figure.

Action: Select the **Change Answers to Authentication Questions** hyperlink.

After selecting the **Change Answers to Authentication Questions** hyperlink the **Change Answers to Authentications Questions** screen will display as illustrated in Figure F 27.

Figure F 27: Change Answers to Authentication Questions Screen

The figure displays the Change Answers to Authentication Questions. There is a list of 10 questions. The user is instructed to enter answers for at least two questions.

The screen navigation buttons are a Save button and a Cancel button.

End of figure.

Action: Answer at least two of the ten **Authentication Questions** listed.

Action: Select the **Save** button when you have finished answering the questions you want to answer.

If you select the **Cancel** button, your answers will be lost and you will be returned to the **My Profile** screen as illustrated in Figure F 26.

The **Change Answers Results** screen will display listing the Authentication Questions you have answered as illustrated in Figure F 28. The answers to the Authentication Questions will be displayed to secure the information.

Figure F 28: Change Answers Results Screen

The figure displays the Change Answers Results screen. It lists the questions answered. The screen has one navigation button on the lower left, an OK button which, when selected completes the authentication question process and returns the user to the My Profile screen.

End of figure.

Action: Select the **OK** button to continue.

The **My Profile** screen will display with all the menu options available for your approved role as illustrated in Figure F 29.

Figure F 29: My Profile Screen

The figure displays the My Profile screen for IACS users in the CMS user communities.

The screen displayed is for a user who has completed the necessary first time login tasks of changing his or her password and answering a minimum of two authentication questions. The My Profile screen now displays 4 hyperlink options:

Modify User/Contact Information – a hyperlink that brings the user to the modify user and or contact information

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

Change Answers to Authentication Questions – a hyperlink that brings the user to the change answers to authentication questions functionality, if he or she wishes to add more answers or change those answers they have already provided.

Change Password – a hyperlink that brings the user to the change password functionality, if he or she wishes to change their password.

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

End of figure.

After your first time login to IACS the following will apply:

- The **Change Password** and **Change Answers to Authentication Questions** hyperlinks only need to be selected if you want to change those values.
- If you have not logged into IACS **for more than 60 days after the last time you changed your password**, you will be required to answer selected Authentication Questions to change your password.
- If you have not logged into IACS **for more than 120 days after the last time you changed your password**, you will be required to provide the last four digits of your SSN and your email address in addition to answering selected Authentication Questions.

- If you have not logged into IACS ***for more than 180 days after the last time you changed your password***, you will be required to call your Help Desk for assistance since your IACS account will be disabled.

F 4.0 Modify User or Contact Information

You may need to modify your existing IACS account profile to update your account's user or professional contact information, modify your User Community role, and/or request access to other CMS Applications and User Communities.

This section describes how to modify the **User or Contact Information** that is in your IACS Account Profile.

Note: To see how to modify your **Access Request** information, and/or request access to other CMS Applications and User Communities, please go to Section F 5.0 of this document.

F 4.1 Accessing the Modify User or Contact Information Hyperlink

The following steps and screens show you how to access your account profile in IACS to make the 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 F 30.

Figure F 30: CMS Applications Portal WARNING/REMINDER Screen

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

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

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

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

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

End of figure.

Action: Read the important information on this screen and indicate your agreement by selecting the ***Enter 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 F 31.

Figure F 31: CMS Applications Portal Introduction Screen

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

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

Introduction, this is the current screen
Account Management, a hyperlink to registration and user management services required to access applications within C M S's Applications Portal
Plans, a hyperlink to Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
Providers, a hyperlink to Providers that participate in the Medicare program such as Hospitals and Physicians

End of figure.

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

The **Account Management** screen will display as illustrated in Figure F 32.

Figure F 32: Account Management Screen

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

The hyperlinks on the Account Management screen are:

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

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

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

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

IACS Community Administration Interface, which will allow you to access assisted user accounts management functions.

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

End of figure.

Action: Select the *My Profile* hyperlink.

Note: The bottom portion of the screen labeled *Help Resources* provides Help Desk contact information.

The **Login to IACS** screen will display as illustrated in Figure F 33.

Figure F 33: Login to IACS Screen

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

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

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

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

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

End of figure.

Action: Enter your *User ID*

Action: Enter your *Password*.

Action: Select the *Login button*.

The **My Profile** screen will display as illustrated in Figure F 34. This screen contains the following hyperlinks:

- **Modify User/Contact Information** – Provides access to the IACS functionality that will allow you to request changes to your User and/or Professional Contact Information. For additional information, see Section F 4.2 below.
- **Modify Account Profile** – Provides access to the IACS functionality that will allow you to request changes to your IACS Account Profile such as adding CMS application access or user communities. For additional information, see Section F 5.0 in this User Guide Attachment.
- **Change Answers to Authentication Questions** – Provides access to the IACS functionality that will allow you to change or answer additional authentication questions. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.
- **Change Password** – Provides access to the IACS functionality that will allow you change your IACS password. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.

Figure F 34: My Profile Screen

The figure displays the My Profile screen for IACS users in the CMS user communities.

The screen displayed is for a user who has completed the necessary first time login tasks of changing his or her password and answering a minimum of two authentication questions. The My Profile screen now displays 4 hyperlink options:

Modify User/Contact Information – a hyperlink that brings the user to the modify user and or contact information

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

Change Answers to Authentication Questions – a hyperlink that brings the user to the change answers to authentication questions functionality, if he or she wishes to add more answers or change those answers they have already provided.

Change Password – a hyperlink that brings the user to the change password functionality, if he or she wishes to change their password.

End of figure.

Action: Select the **Modify User/Contact Information** hyperlink and continue to Section F 4.2 below.

F 4.2 Using the Modify User or Contact Information Hyperlink

The **Modify User/Contact Information** hyperlink provides you with the option to modify the **User Information** and/or **Professional Contact Information** you provided during your IACS registration or updated later. If you change your telephone number or move to a different address, you can update that information by selecting this hyperlink.

Note: When you select the **Modify User/Contact Information** hyperlink, the **Modify User/Contact Information** screen displays as illustrated in Figure F 35. The *User Information* fields are filled in with the information stored in IACS. The SSN field and your social security number are not displayed.

Figure F 35: Modify User/Contact Information Screen

The figure displays the Modify User/Contact Information screen. In the User Information portion of the screen, the User Information fields will be filled in with information previously provided. These fields are editable. The user's SSN field and number are not displayed. Certain validation rules will apply to any changes made and these are explained in this help document.

In the Professional Contact Information portion of the screen the Professional Contact Information fields will be filled in with the information previously provided. These fields are editable.

The screen navigation buttons are a next button and a cancel button.

End of figure.

Action: Modify your **User and/or Professional Contact Information** as needed.

Action: Select the **Next** button when you have completed making your changes.

Note: If you make changes to your email address, the screen will refresh when you leave the Email field after making your change and a *Confirm Email Address* field will appear in which you must confirm your new email address.

The following validation processes will apply on **User Information** changes:

- A *First Name* change will be validated against information on file at the Social Security Administration (SSA).
- A *Last Name* change will be validated against information on file at the SSA.
- A *Date of Birth* change will be validated against information on file at the SSA.
- An *Email Address* change will be validated to be unique as stored in IACS.

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

Figure F 36: Modify Request Confirmation Screen

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

Submit
Edit
Cancel

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

End of figure.

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

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

- Select the **Edit** button to return and edit your changes.
- 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 **OK** button to confirm the action, exit that screen and, close the browser window.

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

Figure F 37: Modify Request Acknowledgement Screen

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

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

End of figure.

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

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

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

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

F 4.2.1 After Account Profile Modification

Your modifications will display the next time you login to IACS.

If your modifications do not display after you have logged in to IACS again, please contact the External User Services, EUS, Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at EUSupport@cgi.com.

Please have your request number from the **Modify Request Acknowledgement** screen available.

F 5.0 Modify Account Profile

You may need to modify your existing IACS account profile to update your account's user or professional contact information, modify your User Community role, and/or request access to other CMS Applications and User Communities.

This section describes how to modify the **Access Request** information that is in your IACS Account Profile.

Note: To see how to modify your **User or Professional Contact Information**, please go to Section F 4.0 in this User Guide Attachment.

Note: When modifying your **Access Request** information, you may only request one change to your profile or one additional application access at a time. You can, however, submit one request and immediately re-enter the Modify Account Profile functionality to submit another request.

F 5.1 Accessing the Modify Account Profile Hyperlink

The following steps and screens show you how to access your account profile in IACS to make the 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 F 38.

Figure F 38: CMS Applications Portal WARNING/REMINDER Screen

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

Two navigation buttons are at the bottom of the screen; an Enter C M S Applications Portal button which will provide access the C M S Applications Portal and a Leave button which will bring the user to the C M S Website. Additional hyperlinks on this screen are in the screen banner and a navigation bar at the top of the screen.

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

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

End of figure.

Action: Read the important information on this screen and indicate your agreement by selecting the ***Enter 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 F 39.

Figure F 39: CMS Applications Portal Introduction Screen

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

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

Introduction, this is the current screen
Account Management, a hyperlink to registration and user management services required to access applications within C M S's Applications Portal
Plans, a hyperlink to Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
Providers, a hyperlink to Providers that participate in the Medicare program such as Hospitals and Physicians

End of figure.

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

The **Account Management** screen will display as illustrated in Figure F 40.

Figure F 40: Account Management Screen

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

The hyperlinks on the Account Management screen are:

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

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

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

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

IACS Community Administration Interface, which will allow you to access assisted user accounts management functions.

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

End of figure.

Action: Select the *My Profile* hyperlink.

Note: The bottom portion of the screen labeled *Help Resources* provides Help Desk contact information.

The **Login to IACS** screen will display as illustrated in Figure F 41.

Figure F 41: Login to IACS Screen

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

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

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

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

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

End of figure.

Action: Enter your *User ID*

Action: Enter your *Password*.

Action: Select the *Login button*.

The **My Profile** screen will display as illustrated in Figure F 42. This screen contains the following hyperlinks:

- **Modify User/Contact Information** – Provides access to the IACS functionality that will allow you to request changes to your User and/or Professional Contact Information. For additional information, see Section F 4.0 in this User Guide Attachment.
- **Modify Account Profile** – Provides access to the IACS functionality that will allow you to modify the Access Request information in your IACS Account Profile. These changes could include: adding new or additional access to CMS Applications or User Communities. For additional information, see Section F 5.2, and following, in this User Guide Attachment.
- **Change Answers to Authentication Questions** – Provides access to the IACS functionality that will allow you to change or answer additional authentication questions. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.
- **Change Password** – Provides access to the IACS functionality that will allow you to change your IACS password. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.

Figure F 42: My Profile Screen

The figure displays the My Profile screen for IACS users in the CMS user communities.

The screen displayed is for a user who has completed the necessary first time login tasks of changing his or her password and answering a minimum of two authentication questions. The My Profile screen displays 4 hyperlink options:

Modify User/Contact Information – a hyperlink that brings the user to the modify user and or contact information

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

Change Answers to Authentication Questions – a hyperlink that brings the user to the change answers to authentication questions functionality, if he or she wishes to add more answers or change those answers they have already provided.

Change Password – a hyperlink that brings the user to the change password functionality, if he or she wishes to change their password.

End of figure.

Action: Select the **Modify Account Profile** hyperlink and continue to Section F 5.2 below.

The **Modify Account Profile** hyperlink provides you with the capability to request access to CMS Applications integrated with IACS and to modify your role.

F 5.2 Using the Modify Account Profile Hyperlink

The **Modify Account Profile** hyperlink provides you with information about and options to make modifications to your IACS profile in several ways:

- **View** details pertaining to your IACS **Access Profile**.
- **Request access/Remove access** to CMS applications integrated with IACS.
- **Request access/Remove access** to **other** CMS User Communities integrated with IACS.
- **Modify your role**, or roles if you have multiple roles.

When you select the **Modify Account Profile** hyperlink, the **Modify Account Profile** screen will display and show the information in your account profile that is specific to your role. An example of this is shown in Figure F 43.

In the **Modify Account Profile** screen, the **User Information** and **Professional Contact Information** are displayed but cannot be modified.

In the **Access Request** portion of this screen, the following fields and information are displayed when the screen first displays:

- A *Select Action* field: the **default selection** in this field is **View My Access Profile** which will display the data listed below:
 - **Community/Application: Role** – Your current applications and communities and user role
 - **Profile Summary** – A summary of your IACS account profile and your role within each application or community
 - **Possible Actions** – A listing of actions you can take in each of your approved roles

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

Figure F 43: Modify Account Profile Screen

The figure displays the Modify Account Profile screen. The User Information and Professional Contact Information portions of the screen display the information on file in IACS for the user. The information in these fields cannot be modified using this functionality.

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

The View My Access Profile table contains the following information:
Community/Application: Role – Displays your current applications or communities and your role within each application or community.

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

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

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

The select action field displays the default action which is: View my access profile. The field has a drop down list with additional actions which will be illustrated later. The screen has one navigation button at the bottom left, a cancel button

End of figure.

In the **Access Request** portion of the screen, the *Select Action* field provides a drop-down list of actions you can select from. These are illustrated in the screen in Figure F 44. Possible actions you can select are:

- **View My Access Profile** – This is the **default view** which appears when the **Modify Account Profile** screen first opens. This default view allows you to view your existing IACS profile with all your roles displaying and provides a brief summary specific to each role. If this is the action you want, it will display when the **Modify Account Profile** screen opens. There is additional information on the screen display in Section F-5.2.1 in this User Guide Attachment.
- **Modify Provider/Supplier Profile** – Allows you to modify your Provider/Supplier access profile. These modifications all fall **within the Provider Community**. Select this to perform any of the actions available, such as those listed below:
 - **Request access/Remove access to** available **Provider/Supplier Community** Applications integrated with IACS.
 - **Organization Modifications**
 - **Create** a new Organization
 - **Associate** to an Organization
 - **Disassociate** from an Organization.
 - **User Group Modifications**
 - **Create** a new User Group
 - **Associate** to a User Group
 - **Disassociate** from a User Group.
- **Add Application** – Allows you to request access to a role in a CMS Application integrated with IACS. This modification will be made **outside the Provider/Supplier Community**. You can only request access to a role in one application at a time.
- **Add Community** – Allows you to request access to a role in a CMS User Community. This modification will be made **outside the Provider/Supplier Community**. . You can only request access to one community role at a time.

Figure F 44: Modify Account Profile Select Action Drop-down List

The figure displays the Access Request portion of the Modify Account Profile screen. All actions are shown in the Select Action drop down list. They include the following:

Modify Provider/Supplier Profile
Add Application
Add Community
View My Access Profile

End of figure.

Action: Select the **Action** you want to take from the drop-down list in the *Select Action* field.

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

F-5.2.1 View My Access Profile

If you select the action, **View My Access Profile**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure F 43. In the **Access Request** portion of the screen, all the applications and user communities to which you are approved for access are listed in the **View My Access Profile** table. There are **no actions** for you to take with this selection.

Note: This is the **default** view that appears when the **Modify Account Profile** screen first opens. If the first action you select in the *Select Action* field drop-down list is the **View My Access Profile** action, there will be no change in the screen.

Figure F 45: View My Access Profile

The figure displays the View My Access Profile table contains the following information:

Community/Application: Role – Displays your current applications or communities and your role within each application or community.
Profile Summary – Displays a summary of your IACS account profile.
Possible Actions – Displays a listing of possible actions that you can take based on each of your approved roles.

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

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

End of figure.

Action: Review the information displayed in the table and ***select another action*** in the ***Select Action*** field drop-down list, or select the ***Cancel*** button to exit and return to the **My Profile** screen.

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 showing update requests you have submitted that are still awaiting approval. An example of this table is illustrated in Figure F 46.

Figure F 46: Pending Requests Table

The figure displays a close up view of the access request portion of the screen. The Pending Requests table is displayed showing the pending request to acquire the role of Security Official in a provider community. The view my access profile, default, action is selected in the select action field.

End of figure.

Action: Review the information displayed in the table and ***select another action*** in the ***Select Action*** field drop-down list, or select the ***Cancel*** button to exit and return to the **My Profile** screen.

F-5.2.2 Modify Provider/Supplier Profile

If you select the action, **Modify Provider/Supplier Profile**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure F 47.

Figure F 47: My Current Access Profile Area and Additional Access Requests Field

The figure displays your expanded access profile information to show the following information:

- The Organization with which you are associated
- The User Group within the Organization with which you are associated, if applicable
- Your current role type
- Your role within an application or community
- An Action field is displayed

If you have a role in more than one application, each role will be displayed in a separate row in the table.

End of figure.

In the **Access Request** portion of the screen, a **My Current Access Profile** table will display your access profile information that will be expanded to show the following:

- The **Organization** with which you are associated
- The **User Group** with which you are associated
- Your **Role Type**
- Your **Role** within your Role Type
- An *Action* field that indicates there is a drop-down list, although the default view in this field is blank.

The drop-down list of actions that you can select in the *Action* field depends on modifications you may have previously made to your IACS account profile.

If the only role you have showing in this table is that of **Individual Practitioner**, The **Organization** and **User Group** fields will show **Not Applicable** because your role belongs to the Provider/Supplier Community. Also, if you do not have any CMS application roles, the only action currently available is:

- **Request Access to Application** – This action *currently* enables you to request access, as a User, to the Physician Quality Reporting Initiative, **PQRI**, Application as illustrated in Figure F 48. Details on requesting access are provided in Section F-5.2.2.1 in this Attachment. Additional details on removing access, once you have an application role, are provided in Section F-5.2.2.2 in this Attachment.

An *Additional Access Requests* field and a *Justification for Action* field are also displayed.

The drop-down list of actions in the *Additional Access Requests* field is briefly described below. More details and instructions on how to complete these actions are available in the IACS User Guide Attachment G.

- ***Create a new User Group*** – This action will require you to assume the role of User Group Administrator as you create a User Group within an existing IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Create a New User Group Section** in the IACS User Guide Attachment G.
- ***Associate to a User Group as an Administrator*** – This action will require you to assume the role of User Group Administrator as you associate to a User Group within an existing IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Associate to a User Group as Administrator Section** in the IACS User Guide Attachment G.
- ***Associate to a User Group as an End User*** – This action will require you to assume the role of End User for an existing User Group within an IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Associate to a User Group as End User Section** in the IACS User Guide Attachment G.
- ***Create a new Organization*** – This action will require you to assume the role of Security Official as you create an IACS Organization. Details on this role, its functions and responsibilities are in the **Create a New Organization Section** in the IACS User Guide Attachment G.
- ***Associate to an Organization as a Backup Security Official*** – This action will require you to assume the role of Backup Security Official for an existing IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Associate to an Organization as a Backup Security Official Section** in the IACS User Guide Attachment G.

F-5.2.2.1 Request Access to Provider/Supplier Application

Note: At the time this user guide was last updated, the only CMS Provider/Supplier application integrated with IACS is the Physician Quality Reporting Initiative, PQRI, application. Examples in this section relate only to requesting access to PQRI.

Selecting this action *currently* enables you to request access, as a User, to the Physician Quality Reporting Initiative, **PQRI**, application.

Figure F 48: My Current Access Profile, Action Field Drop-down List

The figure displays all actions available to an end user in a drop down list. For the Individual Practitioner there is only one available action and that is to Request Access to Application.

End of figure.

Action: Select the **Request Access to Application** action from the drop-down list in the *Action* field of the **My Current Access Profile** table.

When you select the **Request Access to Application** action, the screen will refresh and display an **Access to Applications** section with a *Select Application* field. This field contains a drop-down list of applications you may select as illustrated in Figure F 49.

Figure F 49: Access to Applications, Select Application Drop-down List

The figure displays the Access to Applications portion of the screen once the user has selected to Request Access to an Application. The following applications are shown in the Select Application drop down list:

PQRI (PQRI Application)

End of figure.

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

If you select the **PQRI (PQRI Application)** action, the screen will refresh and display a *Role* field that contains the role of **PQRI User** as illustrated in Figure F 50.

Figure F 50: Modify Account Profile, Justification for Action

The figure displays a close up view of the Access to Applications portion of the screen. The application has been selected from the search results and the role has been selected. Text has been typed in to the Justification for Action field.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her modification process, and a cancel button which will delete any information entered on this screen and cancel the modification request.

End of figure.

Complete the **Modify Account Profile** process by performing the following actions:

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

Note: In the **PQRI** application, the only role available for an Individual Practitioner is the **PQRI User** role, which will be pre-selected for you in *Role* field.

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

When you select the Next button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure F 51.

Figure F 51: Modify Request Confirmation Screen

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

Submit

Edit

Cancel

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

End of figure.

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

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

- Select the **Edit** button to return and edit your changes.
- 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 F 52. You must select the **OK** button to complete your account profile modification.

Figure F 52: Modify Request Acknowledgement Screen

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

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

End of figure.

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

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

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

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

F 5.2.2.1.1 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 the External User Services, EUS, Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at EUSupport@cgi.com.

Please have your request number from the **Modify Request Acknowledgement** screen available.

F-5.2.2.2 Remove Access from Provider/Supplier Application

Note: At the time this user guide was last updated, the only CMS Provider/Supplier application integrated with IACS is the Physician Quality Reporting Initiative, PQRI, application. Examples in this section relate only to removing access to PQRI.

After you have been granted access to the PQRI Application, the **Access Request** portion of your IACS Account Profile will display that information as illustrated in Figure F 53.

Figure F 53: My Current Access Profile Showing PQRI User Role

The figure displays a close up view of the Access Request portion of the screen for a user with more than one role. The My current Access Profile table now contains two rows instead of one. A red arrow directs your attention to the newly added PQRI User role.

End of figure.

Action: Select the **Modify Provider/Supplier Profile** action from the *Selection Action field* drop-down list.

When you select the **Modify Provider/Supplier Profile** action from the *Select Action* field drop-down list, the screen will refresh and display the **My Current Access Profile** table with your PQRI User role as illustrated in Figure F 54.

Figure F 54: Removing Access to PQRI Application – Select Action

The figure displays a close up view of the Access Request portion of the screen for a user with more than one role. The My current Access Profile table now contains two rows instead of one. A red arrow directs your attention to the arrow on the side of the PQRI User action drop down list.

End of figure.

Action: Select the **Remove Access from PQRI** action from the *Action* field drop-down list in the PQRI User role.

When you select the **Remove Access from PQRI** action, the screen will refresh and a confirmation message and check box will appear above the *Justification for Action* field as illustrated in Figure F 54.

Figure F 55: Removing Access to PQRI Application – Confirm and Justify Action

The figure displays a close up view of the Access Request portion of the screen for a user with more than one role. The My current Access Profile table now contains two rows instead of one. A red arrow directs your attention to the arrow on the side of the PQRI User action drop down list where Remove Access from PQRI has been selected. A second arrow directs your attention to the confirm action check box. And underneath that is a third red arrow directing your attention to the text in the Justification for action field.

End of figure.

Complete the **Modify Provider/Supplier Profile** process by performing the following actions:

Action: Select the **Check Box** to confirm that you want to remove yourself from the PQRI User role.

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

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

When you select the Next button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure F 56.

Figure F 56: Modify Request Confirmation Screen

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

Submit

Edit

Cancel

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

End of figure.

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

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

- Select the **Edit** button to return and edit your changes.
- 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 F 57. You must select the **OK** button to complete your account profile modification.

Figure F 57: Modify Request Acknowledgement Screen

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

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

End of figure.

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

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

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

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

F 5.2.2.2.1 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 the External User Services (EUS) Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at EUSupport@cgi.com.

Please have your request number from the **Modify Request Acknowledgement** screen available.

F-5.2.3 Add Application

If you select the action, **Add Application**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown Figure F 58.

Figure F 58: Modify Account Profile Select Application Field

The figure is a close up view of the Access request portion of the modify profile screen. The figure displays Add Application selected in the “Select Action” drop-down box. Underneath that is the “Select Application” drop-down box containing a list of the other CMS Applications.

End of figure.

The *Select Application* field contains a drop-down list of the CMS applications integrated with IACS as illustrated in Figure F 59.

Figure F 59: Modify Account Profile Select Application Drop-down List

The figure is a close up view of the Access request portion of the modify profile screen. The figure displays Add Application selected in the “Select Action” drop-down box. Underneath that is the “Select Application” drop-down box displaying all four available CMS applications.

End of figure.

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
- **Attachment D – HETS-UI** – HIPPA Eligibility Transaction System User Interface

F-5.2.4 Add Community

If you select the action, **Add Community**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure F 60.

Figure F 60: Modify Account Profile Select Community Field

The figure is a close up view of the Access request portion of the modify profile screen. The figure displays Add Community selected from the “Select Action” drop-down box. Underneath that is the “Select Community” drop-down box containing a list of the other CMS Communities.

End of figure.

The *Select Community* field contains a drop-down list of the other CMS communities integrated with IACS as illustrated in Figure F 61.

Note: The community names shown on the drop-down list may vary depending on the number of CMS communities integrated with IACS and your current access profile. Only those communities not already in your profile will be displayed.

Figure F 61: Example of the Modify Account Profile Select Community Drop-down List

The figure is a close up view of the Access request portion of the modify profile screen. The figure displays Add Community selected in the “Select Action” drop-down box.

Underneath that is the “Select Community” drop-down box displaying the available CMS Communities.

End of figure.

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

Please refer to the procedures for requesting access to the various CMS communities, using the Modify Account Profile option, which are provided in the following IACS help document attachment:

- **Attachment E – DMEPOS Community**
- **Attachment G – Provider/Supplier and FI/Carrier/MAC Communities**

F 6.0 Additional IACS Procedures

F 6.1 *Forgot Your Password?*

When you want to login to IACS, you are required to enter your User ID and Password on the **Login to IACS** screen which is illustrated in Figure F 62. If, however, you have forgotten your password, you can follow the actions listed below.

Figure F 62: Login to IACS Screen

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

One red arrow directs your attention to the User ID field and a second red arrow directs your attention to the *Forgot your password?* Button which will bring you to the password reset functionality, if he or she has forgotten their IACS password.

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

End of figure.

Action: Enter your **User ID**.

Try to remember your password and only use the ***Forgot Your Password*** button if you have actually forgotten your password and cannot remember it. This feature will result in a reset of your password and issue you with a temporary, one-time password, which you must change when you login the next time.

Note: Your account will be locked if you incorrectly enter your password three times within a 30 minute timeframe. You must wait 60 minutes before you can try to login again. Alternatively, you can call your Help Desk to have them unlock your account.

Action: Select the ***Forgot Your Password?*** button if you have forgotten your Password.

A **Security Questions** screen will display as illustrated in Figure F 63.

Figure F 63: Security Questions Screen

The figure displays the Security Questions screen. You are instructed to answer the 2 security questions displayed. The first is to provide the last 4 digits of your SSN. The second is to provide your Email address.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her password reset, and a cancel button which will delete any information entered on this screen and cancel the password reset process.

End of figure.

Action: Enter the last four digits of your **Social Security Number** in the field provided.

Action: Enter your **email address** in the field provided.

Note: The answer fields for the security questions are **not case sensitive**.

Action: Select the **Next** button.

When you select the **Next** button, an **Identify User** screen will display as illustrated in Figure F 64. Answer fields for the authentication questions you answered during your initial login will be displayed. You must answer correctly at least two of the questions. If you answer incorrectly the questions three times in a row, your account will be locked. You must wait 60 minutes before you can try again. Alternatively, you can call your Help Desk to have them unlock your account.

Figure F 64: Forgot Your Password Authentication Questions Screen

Figure displays the Forgot Your Password screen which displays the following message: If you have forgotten your password IACS must reset your password and issue you a new one-time password. Please answer at least two of the following questions to request that your password be reset (answers are not case sensitive), and click "Login". Underneath that are the two authentication questions.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her password reset process, and a cancel button which will delete any information entered on this screen and cancel the password reset process.

End of figure.

Action: Answer each question with the exact answer provided previously.

Note: The answer fields for the authentication questions are **not case sensitive**.

Action: Select the *Login* button.

The **Login to IACS** screen will display again with a message above the *User ID* field indicating that a temporary, one-time password has been emailed to you. This is illustrated in Figure F 65. This email notification contains a temporary, one-time password.

Figure F 65: Password Email Notification Screen

The figure displays the login to IACS screen. The following message is highlighted at the top of the screen:

The request for your IACS password reset has been submitted. Please check your email for a one time temporary password. If you do not receive the email in the next 30 minutes, please call the helpdesk.

End of figure.

Action: Go to your email and get your new password. This will be a temporary, one-time password that you must change next time you log in.

Note: The email subject line will be: **FYI: User Creation Completed – Password Enclosed.**

Figure F 66 illustrates a sample password notification email that you would receive.

Figure F 66: Example: Password Notification Email

The figure displays the text of the password notification email which says the following:

Your temporary one-time password is -<your password will appear here>.
Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>
Read the privacy statement and click the Enter CMS Applications Portal button.

Select the Account Management link on the menu bar, and then the my profile link.

Login to IACS using your User ID and password to change your password.

Thank you,
IACS

Please do not reply to this system-generated email.

End of figure.

Note: If you do not receive this email notification within 24 hours, please contact the External User Services (EUS) Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at EUSsupport@cgi.com.

Action: Go to Section F 3.0, and follow the steps for logging in and changing your password. You do not have to answer the authentication questions again unless you want to change your answers.

F 6.2 *Forgot Your User ID?*

When you login to IACS, you are required to enter your User ID and Password. If you have forgotten your User ID you can select the ***Forgot Your User ID?*** hyperlink on the **Account Management** screen as illustrated in Figure F 67.

Figure F 67: Account Management Screen: Forgot Your User ID?

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

The hyperlinks on the Account Management screen are:

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

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

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

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

IACS Community Administration Interface, which will allow you to access assisted user accounts management functions.

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

End of figure.

Action: Select the ***Forgot Your User ID?*** hyperlink.

The **Forgot Your User ID?** screen will display as illustrated in Figure F 68.

Figure F 68: Forgot Your User ID? Screen

Figure displays the Forgot Your User ID screen the User Information entry fields. These fields are explained in this help document.

The screen has two navigation buttons at the bottom of the screen; a next button which allows the user to proceed with his or her User ID retrieval, and a cancel button which will delete any information entered on this screen and cancel the User ID retrieval process.

End of figure.

Action: You must complete correctly the following **required fields**:

1. *First Name*
2. *Last Name*
3. *Date of Birth*
4. *Social Security Number*
5. *Email (address)*

Note: The data you enter must match the information that currently exists in your IACS user account profile.

Action: Select the **Next** button when you are done.

The **User ID Recovery - Authentication** screen will display as illustrated in Figure F 69. This screen will display authentication questions you answered during your initial login. You must provide correct answers to the authentication questions displayed.

If you incorrectly answer the questions three times in a row, your account will be locked. You must wait 60 minutes before you can try again. Alternatively, you can call your Help Desk to have them unlock your account. For help desk contact information, see Section F 7.5.

Figure F 69: User ID Recovery - Authentication Screen

Figure displays the User ID Recovery - Authentication screen which displays the following message: Please answer the secret questions below. Underneath that are the two authentication questions.

The screen has three navigation buttons at the bottom of the screen; a back button to return to the previous screen, a next button which allows the user to proceed with his or her User ID recovery process, and a cancel button which will delete any information entered on this screen and cancel the user ID recovery process.

End of figure.

Action: Answer each question that is displayed with the exact answer you provided previously.

Action: Select the **Next** button.

Note: When you select the **Next** button a **Confirmation** screen will display as illustrated in Figure F 70. This screen informs you that your IACS User ID has been sent to the email address on file in your IACS user account.

- If you need to go back to the previous screen to review the information you have entered, select the **Back** button.
- If you select the **Cancel** button, your User ID Recovery request is cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to exit that screen.

Figure F 70: User ID Recovery Confirmation Screen

The figure displays the confirmation screen which says your user ID was sent to the email address on file. There is one navigation button at the bottom to close the screen.

End of figure.

Action: Select the **Close** button to close this browser window.

Figure F 71 illustrates an example of the email you will receive providing your IACS User ID.

Figure F 71: Example of a User ID Email

The figure displays a sample email that is sent to the user to deliver his User ID reminder. The text reads as follows:

Your User ID for accessing IACS is <your User ID will appear here>

Thank you,

IACS

Please do not reply to this system generated email.

End of figure.

F 7.0 IACS Questions and Help

F 7.1 Frequently Asked Questions - FAQs

For questions regarding the IACS system, please go to the IACS FAQ page as follows:

Action: Browse to: https://www.cms.hhs.gov/IACS/17_FAQ.asp#TopOfPage on the CMS website.

The CMS FAQ page is another resource for questions regarding IACS. Please go to the CMS FAQ page as follows:

Action: Go to: <https://www.cms.hhs.gov/home/tools.asp> on the CMS website.

Action: Under **Site wide Tools and Resources**, select **Frequently Asked Questions**.

Action: Do a Search for **IACS**.

Answers to many commonly asked IACS questions can be found through this process.

If you have further questions, please call your Help Desk. For help desk contact information, see Section F 7.5 in this User Guide Attachment.

F 7.2 Be Proactive!

A majority of the problems users of the IACS system face occur due to human error. Most of these problems can be avoided if greater care is exercised during the registration and approval process.

1. Please double-check information on your registration screen prior to submission.
2. If you are an approver, please double-check the access request information that your users have provided, before approving or rejecting their request.

These two quick and simple steps will help get users into the IACS system as quickly as possible.

F 7.3 Online Training – IACS Computer-Based Training – CBT

IACS provides selected Computer Based Training, CBT, units to help users understand IACS processes covering the functions in IACS, including new user registration, first time login, modify account profiles, etc. This online training is provided in both accessible, 508 compliant and non-compliant versions which are updated on a regular basis.

Each training unit consists of a simulated walk-through of a relevant IACS task supplemented by the IACS help documents such as this User Guide Attachment and the various Attachments, and/or Quick Reference Guides that are available online. The CBT

units walk the learner thru the most common tasks and or processes that he or she will encounter.

There are no user tests associated with the IACS computer-based training.

To access the IACS CBT, go to the **Account Management** screen which is illustrated in Figure F 72.

Action: Select the ***Computer Based Training (CBT) for Account Management*** hyperlink.

Figure F 72: Account Management Screen – Computer-Based Training Hyperlink

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

The hyperlinks on the Account Management screen are:

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

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

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

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

IACS Community Administration Interface, which will allow you to access assisted user accounts management functions.

A red arrow directs your attention to the Computer based training link.

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

End of figure.

The **IACS Computer-Based Training (CBT)** main menu screen will display as illustrated in Figure F 73.

Note: The IACS Computer-Based Training main menu screen is a dynamic screen which changes as and when new training is added for new or revised IACS functions. The screen you see may display more selections than the one illustrated.

Figure F 73: IACS CBT Main Menu Screen

The menu screen has links to training for both CMS Communities and CMS Applications. The links are explained in detail in this help document.

End of figure.

The menu screen has links to training for both CMS Communities and CMS Applications. Three CBT units for both areas are available **from this main menu screen**. They are:

- New User Registration – Standard and Accessible versions
- Forgot My Password? – Standard and Accessible versions
- Forgot Your User ID? – Standard and Accessible versions

In addition, selecting the **Account Management** link in both the **CMS Communities** and the **CMS Applications** sections of the menu will bring you to additional computer-based training units specific to those areas.

Action: Select the desired CBT unit from the main menu screen to access that CBT training unit.

Action: Select the **Account Management** hyperlink to access additional CBT training units.

Note: If you want the accessible, 508 compliant, training units, please use the hyperlinks indicated as **Accessible** in their titles.

F 7.4 Prepare Your Computer

To optimize your access to the IACS screens, please ensure that the following criteria are met:

1. **Screen Resolution:** CMS screens are designed to be viewed at a minimum screen resolution of 800 x 600.
2. **Internet Browser:** Use Internet Explorer, version 6.0 or higher.
3. **Plug Ins:** Verify that the latest version of JAVA and/or ActiveX is installed on your PC.
4. **Pop-up Blockers:** Disable pop-up blockers prior to attempting to access the CMS Applications Portal.

Contact your Help Desk if you have questions about any of the above criteria. For help desk contact information, see Section F 7.5.

F 7.5 Help Desk Information

The Help Desk associated with the Provider/Supplier Community is the External User Services (EUS) Help Desk.

1. Their **hours of operation** are: Monday-Friday 7am to 7pm Eastern Standard Time (EST).
2. Their **telephone** number is: 1-866-484-8049.
3. Their **TTY/TDD** number is: 1-866-523-4759.
4. Their **email** address is: EUSsupport@cgi.com.
5. Their **mailing** address is: Post Office Box 792750, San Antonio, Texas, 78216.

End of IACS User Guide, Attachment F