

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

**Attachment D – HETS UI  
HIPAA Eligibility Transaction System  
User Interface**

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## Important Note

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

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

This IACS Help Document Attachment provides instructions on how to:

1. Complete the ***Access Request*** portion of the **New User Registration** screen for HIPAA Eligibility Transaction System User Interface, HETS UI.
2. Modify your account profile.
3. Access your desired C M S application.

## D 1.0 HETS UI Access Request Fields

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

You then selected the hyperlink for the HETS UI application and the **New User Registration** screen opened.

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

Up until this point, the information you provided was generic and identified you to IACS. Now we will examine the information fields that are specific to the HETS UI application.

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

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.

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

### Figure D 2: HETS UI – User Type Displayed

The figure displays the Access Request portion of the new user registration screen. The user type field shows the pre selected application for this user, it is the HETS UI application.

Also displaying are a role field, a RACF ID field, and a justification for action field. The screen shows two navigation buttons, a next button and a cancel button.

End of figure.

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

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

### Figure D 3: HETS UI – Role Drop-down List

The figure displays the Access Request portion of the new user registration screen for the HETS UI application with the role field drop down list displayed. The roles and their functions are discussed in detail in this document.

End of figure.

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

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

#### D 1.1 HETS UI – User/Provider Role

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

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

#### Figure D 4: HETS UI User/Provider – Data Entry Fields

The figure displays the Access Request portion of the new user registration screen as previously described with the User/Provider role selected. Additional fields now display. They are Billing Provider NPI and Provider Type. These fields and instructions on how to complete them are discussed in detail in this document.

End of figure.

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

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

#### Figure D 5: HETS UI User/Provider – Provider Type Drop-down List

The figure displays the Access Request portion of the new user registration screen for the User/Provider role with the provider type field drop down list displayed. However, in this figure there is a graphic arrow that points to the provider names displayed and indicates the user must select the appropriate provider or providers from this listing. Detailed instructions for completing this field are provided in this document.

End of figure.

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

#### Figure D 6: HETS UI User/Provider – RACF ID Field

The figure illustrates the previous screen with a graphic arrow indicating the RACF ID field indicating the user should enter his or her RACF ID if they have that ID number.

End of figure.

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

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

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

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

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

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

#### **Figure D 7: HETS UI User/Provider – Justification for Action Field**

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

End of figure.

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

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

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

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

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

### D 1.2 HETS UI – User/Approver Role

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

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

#### Figure D 8: HETS UI User/Approver – Data Entry Fields

The figure displays the Access Request portion of the new user registration screen with the role of User/Approver selected. Additional entry fields are displayed. These fields are Billing Provider NPI and Provider Type. Detailed instructions on how to complete these fields are provided in this document.

End of figure.

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

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

#### Figure D 9: HETS UI User/Approver – Provider Type Drop-down List

The figure displays the Access Request portion of the new user registration screen for the User/Approver role with the provider type field drop down list displayed. However, in this figure there is a graphic arrow that points to the provider names displayed and indicates the

user must select the appropriate provider or providers from this listing. Detailed instructions for completing this field are provided in this document.

End of figure.

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

#### **Figure D 10: HETS UI User/Approver – RACF ID Field**

The figure illustrates the previous screen with a graphic arrow pointing to the RACF ID field indicating the user should enter his or her RACF ID if they have that ID number.

End of figure.

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

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

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

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

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

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

#### **Figure D 11: HETS UI User/Approver – Justification for Action Field**

The figure displays the Access Request portion of the new user registration screen for the role of User/Approver as described in the previous figure except that in this illustration there is a graphic arrow to draw attention to the justification for action field which has the

justification, "Request this access for work" entered in it. Another graphic arrow indicates the next button, which the user would select if they had completed entries on this screen

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 11. This field must include the reason you are requesting this action.

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

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

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

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

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

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

- The *Billing Provider NPI* field, required, is a ten digit number. If you are not sure what this number is, contact your Help Desk for assistance. This is the MCARE Help Desk. Their phone number is 1-866-440-3805. Their Fax number is 1-615-238-0822. Their email address is: [mcare@CMS.hhs.gov](mailto:mcare@CMS.hhs.gov).
- The *Provider Type* field, required, has a drop-down list that you can use to select your provider type.
- The *RACF ID* field, optional, is provided for you to enter your RACF ID if you have this ID number.

#### Figure D 12: HETS UI Security Official – Data Entry Fields

The figure displays the Access Request portion of the new user registration screen as previously described with the Security Official role selected and entry fields displayed. These fields are the billing provider NPI and the Provider type . Detailed instructions on how to complete them are provided in this document.

End of figure.

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

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

- The **Primary Security Official** will be required to complete the EDI Registration Form. The procedures for this are presented in Section D 1.3.1, below.
- The **Backup Security Official** will be presented with a completed EDI registration form after entering the Billing Provider NPI. This is presented in Section D 1.3.2 of this document.

#### D 1.3.1 Primary Security Official

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

- Providing the proper Billing Provider NPI to new users (**User/Providers** and **User/Approvers**) registering in IACS.
- Approving IACS registration requests for certain **User/Approvers**. Please go to Section D 2.0, in this document, for more information on this item.
- Keeping the lists of Physicians, Physician NPIs, and Contractors associated with your provider up to date.

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

**Figure D 13: HETS UI Primary Security Official – Messages and EDI Registration Form**

The figure displays the Access Request portion of the new user registration screen as previously described with the Security Official role selected and the billing provider NPI entered.

In this illustration a system message appears beneath the role entry field. This message reads: No existing Security Official was found with the Billing Provider number that was entered. You may add your EDI Registration information below.

This indicates the user will be registering as the Primary Security Official.

A graphic box indicates the EDI Registration form and its blank entry input fields. These fields and instructions on how to complete them are discussed in detail in this document.

End of figure.

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

**Figure D 14: HETS UI Primary Security Official – Provider Type Drop-down List and RACF ID Field**

The figure illustrates the access request portion of the Security Official’s registration screen. Graphic arrows indicate the Provider type and RACF ID fields. The security official must select a provider type and enter his or her RACF ID, if they have this ID number.

End of figure.

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

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

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

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

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

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

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

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

#### D 1.3.1.1 Completing the EDI Registration Form

##### Figure D 15: HETS UI Primary Security Official – EDI Registration Form Fields

The figure illustrates the security Official's EDI Registration Form with some data entered. Detailed instructions on completing all the entry fields on this form are provided in this document.

End of figure.

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

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

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

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

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

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

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

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

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

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

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

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

#### **Figure D 16: EDI Registration Form – Physicians Added/Removed Areas**

The figure illustrates the security Official's EDI Registration Form with a physician added and displayed in a new area entitled *Physicians Added*. Detailed instructions on adding and or removing physicians are provided in this document.

End of figure.

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

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

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

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

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

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

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

Repeat this process for each physician you want to add.

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

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

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

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

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

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

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

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

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

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

#### **Figure D 17: EDI Registration Form – Contractor Name Drop-down List**

The figure illustrates the security Official's EDI Registration Form with the Contractor Name drop-down list displayed. Detailed instructions on adding and or removing contractors are provided in this document.

End of figure.

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

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

**Example:** If you send Part B claims to First Coast Service Options (FCSO) , select **00590 FCSO B** from the drop-down list and enter their Billing Provider Number. If you also send Part A claims to Noridian, you would select **00320 Noridian A**, and also enter a Billing Provider Number with that contractor as well.

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

#### **Figure D 18: EDI Registration Form – Contractor Billing Provider Number**

The figure illustrates the security Official's EDI Registration Form with a contractor name selected and a billing provider number entered in the billing provider number field. Detailed instructions on adding and or removing contractors are provided in this document.

End of figure.

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

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

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

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

#### **Figure D 19: EDI Registration Form – Contractors Added/Removed Areas**

The figure illustrates the security Official's EDI Registration Form with three contractors added and displayed in a new area entitled Contractors Added. Detailed instructions on adding and or removing contractors are provided in this document.

End of figure.

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

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

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

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

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

Repeat this process for each contractor you want to add.

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

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

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

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

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

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

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

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

#### **Figure D 20: HETS UI Primary Security Official – Justification for Action Field**

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

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 20. This field must include the reason you are requesting this action.

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

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

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

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

### D 1.3.2 Backup Security Official

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

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

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

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

The MEIC Help Desk phone number is 1-866-440-3805. They can also be contacted by email at [MCARE@CMS.hhs.gov](mailto:MCARE@CMS.hhs.gov).

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

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

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

This is illustrated in Figure D 21.

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

The figure displays the Access Request portion of the new user registration screen with the Security Official role selected and a billing provider NPI entered. In this illustration a system message appears beneath the role entry field. This message reads: A Primary Security Official with the Billing Provider number that was entered was found. The EDI Registration information is populated below and cannot be changed.

This indicates the user will be registering as the backup Security Official.

A graphic box indicates the EDI Registration form and its prepopulated entry input fields. Instructions on how to complete the backup security official registration are discussed in detail in this document.

End of figure.

Continue with your registration as illustrated in Figure D 22.

**Figure D 22: HETS UI Backup Security Official – Provider Type Drop-down List and RACF ID Field**

The figure illustrates the access request portion of the Backup Security Official's registration screen. Graphic arrows indicate the Provider type and RACF ID fields. The backup security official must select a provider type and enter his or her RACF ID, if they have this ID number.

End of figure.

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

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

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

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

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

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

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

### Figure D 23: HETS UI Backup Security Official – Justification for Action Field

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

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 23. This field must include the reason you are requesting this action.

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

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

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

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

#### D 1.4 **MEIC Help Desk Role**

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

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

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

#### **Figure D 24: MEIC Help Desk – Data Entry Fields**

The figure displays the Access Request portion of the new user registration screen with the MEIC Help Desk role selected. The only other entry fields displaying are the RACF ID field and the justification for action field.

End of figure.

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

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

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

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

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

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

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

#### Figure D 25: MEIC Help Desk – Justification for Action Field

The figure displays the Access Request portion of the new user registration screen for the role of MEIC Help Desk. In this illustration there is a graphic arrow to draw attention to the justification for action field which has the justification, "Require this access for work." entered in it. Another graphic arrow indicates the next button, which the user would select if they had completed entries on this screen.

End of figure.

**Action:** Enter a brief justification statement for your request in the *Justification for Action* field that is illustrated in Figure D 25. This field must include the reason you are requesting this action.

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

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

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

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

## D 2.0 HETS UI Approval Processes

### D 2.1 *Typical Approval Process*

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

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

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

#### Figure D 26: Typical HETS UI Approval Process

The figure illustrates the typical HETS UI approval process which is described in this section of the document.

End of figure.

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

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

### D 2.2 *Special Approval Process*

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

#### Figure D 27: Special Approval Process

The figure illustrates the special HETS UI approval process which is described in this section of the document.

End of figure.

The MEIC Help Desk approves the Security Official.

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

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

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

## D 3.0 Modify Account Profile

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

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

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

**Note:** The Help Desk phone number is 1-866-440-3805. Their Fax number is 1-615-238-0822 and their email address is: [mcare@CMS.hhs.gov](mailto:mcare@CMS.hhs.gov).

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

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

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

- Requesting access to a C M S application integrated with IACS.
- Requesting a role in a C M S User Community integrated with IACS.

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

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

The **C M S Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure D 28.

### Figure D 28: C M S Applications Portal WARNING/REMINDER Screen

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

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

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

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

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

End of figure.

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

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

The **C M S Applications Portal Introduction** screen will display as illustrated in Figure D 29.

#### **Figure D 29: C M S Applications Portal Introduction Screen**

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

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

Introduction, this is the current screen

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

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

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

End of figure.

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

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

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

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

### **Figure D 30: 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.

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

### Figure D 31: Login to IACS Screen

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

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

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

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

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

End of figure.

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

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

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

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

### Figure D 32: My Profile Screen – Modify Account Profile Hyperlink

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

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

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

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

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

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

End of figure.

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

The **Modify Account Profile** screen will display. Selected *User Information* fields will be filled in with information you previously provided during the registration process, however,

the information in these fields cannot be changed. Also, the SSN field is not displayed. Sample *User Information* fields in a **Modify Account Profile** screen are illustrated in Figure D 33.

In the **Access Request** portion of the **Modify Account Profile** screen a *Select Action* field and a **View My Access Profile** table display. Both are illustrated in Figure D 35: The **View My Access Profile** table contains the following information:

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

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

#### Figure D 33: HETS UI Security Official – Modify Account Profile Screen

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

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

The View My Access Profile table contains the following information:

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

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

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

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

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

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

End of figure.

The *Select Action* field provides a drop-down list of actions you can take when modifying your account profile. This list is illustrated in Figure D 34.

The *default* view is **View My Access Profile**.

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

- **Modify HETS UI Profile** – Allows a HETS UI *primary* Security Official to modify his or her HETS UI account profile. Select this option if you want to add or remove physicians or contractors from the profile or change other organization information. For users in other HETS UI roles, selecting this option will allow you to view information about your role and organization. You cannot, however, make any changes to your HETS UI account profile. If this is the action you want to take, go to Section D 3.1.
- **Add Application** – This option is available to *all* HETS UI users and allows you to select an application to which you want to request access. You can only request access to one application at a time. Select this option if you want to request access to applications other than HETS UI. If this is the action you want to take, go to Section D 3.2.
- **Add Community** – This option is available to *all* HETS UI users and allows you to select a C M S Community to which you want to request access. You can only request access to one community role at a time. If this is the action you want to take, go to Section D 3.3.
- **View My Access Profile** – This option is available to all HETS UI users and allows you to view your existing IACS profile with all roles and provides a brief summary of entities specific to each role. If this is the action you want to take, go to Section D 3.4.

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

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

Modify HETS UI Profile – listing the name of the user’s current application or user community.  
 Add application – which will bring the user to the add application screens.  
 Add community – which will bring the user to the add community screens.  
 View my access profile – which is the default view described in the previous figure.  
 These actions will be explained in detail in this help document.  
 End of figure.

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

### **D 3.1 Modify HETS UI Profile**

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

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

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

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

**Figure D 35: HETS UI Primary Security Official: Modify HES UI Profile Screen**

The figure displays a view of the access request portion of the Modify Account Profile screen for the HETS UI primary Security Official role.

The view my access profile table is no longer displayed on screen. The functions of add physician and add contractor are displayed with their appropriate entry fields and add buttons.

In the physicians added area, the user's current physicians are displayed in a field labeled: Physicians added. To the left of this field is a vertical selection of four navigation buttons; a right facing arrow button, a left facing arrow button, a double right facing arrow button and a double left facing arrow button.

To the left of these navigation buttons, is an empty field, labeled: Physicians removed. In the contractors added area, the user's current contractors are displayed in a field labeled: contractors added. To the left of this field is a vertical selection of four navigation buttons; a right facing arrow button, a left facing arrow button, a double right facing arrow button and a double left facing arrow button.

To the left of these navigation buttons, is an empty field, labeled: contractors removed. Below these fields is the justification for action field. The screen has a next navigation button and a cancel navigation button.

End of figure.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

#### **Figure D 36: Modify Request Confirmation Screen**

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.

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

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

#### **Figure D 37: 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.

### D 3.1.1 After Account Profile Modification

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

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

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

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

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

### D 3.2 Add Application

When you select the **Add Application** action, the screen will refresh and you will be presented with a screen similar to the one illustrated in Figure D 38. This action will allow you to request access to other C M S applications integrated with IACS.

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

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

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

#### Figure D 38: Modify HETS UI Profile – Add Application

The figure displays the access request portion of the screen with the Add Application action selected. A select application entry field is displayed.

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

End of figure.

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

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

**Figure D 39: Add Application – Select Application Drop-down List**

The figure displays the access request portion of the screen with the Add Application action selected and the drop down list in the select application field displaying showing the current applications available to the user.

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

End of figure.

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

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

- **Attachment A – MA/MA PD/PDP/CC** – Medicare Advantage/Medicare Advantage Prescription Drug/Prescription Drug Plan/Cost Contracts
- **Attachment B – CBO/CSR** – Community Based Organization/Customer Service Representative
- **Attachment C – COB** – Coordination of Benefits – VDSA and COBA Organizations

**D 3.3 Add Community**

When you select the **Add Community** action, the screen will refresh and you will be presented with a screen similar to the one illustrated in Figure D 40. This action will allow you to request a role in a C M S User Community.

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

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

**Figure D 40: Modify HETS UI Profile – Add Community**

The figure displays the access request portion of the screen with the Add Community action selected in the select action field. A selection community entry field is displayed.

Below this field is the justification for action field.

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

End of figure.

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

#### **Figure D 41: Add Community – Select Community Drop-down List**

The figure displays the access request portion of the screen with the Add Community action selected in the select action field as described in the previous figure.

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

The other screen features remain the same.

End of figure.

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

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

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

#### **D 3.4 View My Access Profile**

With the **View My Access Profile** action selected, the screen will look similar to the example shown in Figure D 42. In the **Access Request** portion of the screen, a table showing your current applications and roles is displayed. All of the applications and/or community roles for which you are approved for access are listed in this table.

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

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

#### Figure D 42: View My Access Profile Table on Screen

The figure displays the Access Request portion of the Modify Account Profile screen with the view my access profile action selected. A View My Access Profile table displays under the selection action field.

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.

However, if you have recently submitted a Modify Account Profile update request and the request is still awaiting approval, a *Pending Requests* table will display immediately below the **Access Request** label and contain all the requests you have submitted that are still awaiting approval. This table is illustrated in Figure D 43.

#### Figure D 43: Pending Requests Table on Screen

The figure displays the Access Request portion of the Modify Account Profile screen that will display if you have pending requests that are awaiting action.

A Pending Requests table will display above the select action field with all your pending requests.

End of figure.

## D 4.0 Login to HETS UI

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

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

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

The **C M S Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure D 44.

### Figure D 44: C M S Applications Portal WARNING/REMINDER Screen

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

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

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

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

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

End of figure.

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

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

The **C M S Applications Portal Introduction** screen will display as illustrated in Figure D 45.

**Figure D 45: C M S Applications Portal Introduction Screen**

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

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

Introduction, this is the current screen

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

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

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

End of figure.

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

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

Hyperlinks on this screen will allow users to access selected Provider items and the IACS Community Administration Interface.

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

**Figure D 46: Providers Screen**

The figure displays the Providers screen.

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

HETS UI HIPAA Eligibility Transaction System User Interface

IACS Community Administration Interface

HETS Provider GUI (HPG)

CARE – Continuity Assessment Record & Evaluation

Medicare Advantage & Part D Inquiry System

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

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

End of figure.

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

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

### Figure D 47: Login to IACS Screen

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

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

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

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

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

End of figure.

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

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

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

**Note:** If you have forgotten your IACS password, select the *Forgot Your Password?* button. Instructions on how to use this function are provided in the IACS User Guide Main Body which can be found under General User Guides and Resources at: [www.CMS.hhs.gov/IACS](http://www.CMS.hhs.gov/IACS) .

When you login with your IACS User ID and Password:

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

## End of Attachment D