



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

Attachment G

**Provider/Supplier and FI/Carrier/MAC
Communities**

February 2009

CONTENTS

G 1.0 Introduction.....	1
G 1.1 Purpose	1
G 1.2 Background	1
G 1.3 How to Use this User Guide	1
G 1.4 Formatting Conventions	2
G 1.5 Additional IACS Help Documents.....	3
G 1.6 IACS Screen Information.....	5
G 2.0 IACS Registration	6
G 2.1 Accessing IACS New User Registration.....	6
G 2.1 New User Registration – Role Selection	11
G 2.2 Entering User Information.....	14
G 2.2.1 Validation Failure - First Attempt.....	16
G 2.2.2 Validation Failure – Second Attempt.....	17
G 2.2.3 Validation Success.....	19
G 2.3 Entering Professional Contact Information	21
G 2.4 Completing Your Registration.....	23
G 3.0 Role Specific Registration Request Steps	24
G 3.1 End User.....	24
G 3.1.1 End User – Associating With a User Group	25
G 3.1.2 End User – Completing Your Registration.....	29
G 3.1.3 End User – After Completing Your Registration	31
G 3.2 User Group Administrator.....	33
G 3.2.1 User Group Administrator – Create a Provider User Group	35
G 3.2.2 User Group Administrator – Create a Surrogate User Group.....	39
G 3.2.3 User Group Administrator – Associate to an Existing User Group	43
G 3.2.4 User Group Administrator– Completing Your Registration.....	47
G 3.2.5 User Group Administrator – After Completing Your Registration	49
G 3.3 Backup Security Official.....	51
G 3.3.1 Backup Security Official – Completing Your Registration.....	54
G 3.3.2 Backup Security Official – After Completing Your Registration	56
G 3.4 Security Official.....	58
G 3.4.1 Security Official – Completing Your Registration.....	62
G 3.4.2 Security Official – After Completing Your Registration	63
G 3.5 Registry End User	66
G 3.5.1 Registry End User – Completing Your Registration	68
G 3.5.2 Registry End User – After Completing Your Registration	70
G 4.0 First Time Login to IACS.....	73
G 4.1 Change Password	75
G 4.2 Change Answers to Authentication Questions	78
G 5.0 Modify User or Contact Information	82
G 5.1 Accessing the Modify User or Contact Information Hyperlink	82
G 5.2 Using the Modify User or Contact Information Hyperlink.....	86

G 6.0	Modify Account Profile	90
G 6.1	Accessing the Modify Account Profile Hyperlink	90
G 6.2	Using the Modify Account Profile Hyperlink.....	94
G 6.3	View My Access Profile	97
G 6.4	Modify Provider/Supplier Profile or Modify FI/Carrier/MAC Profile	99
G 6.4.1	Modify Provider/Supplier Profile (or Modify FI/Carrier/MAC Profile) – Actions in the My Current Access Profile Table	101
G 6.4.1.1	View User Group Details – End Users	102
G 6.4.1.2	View/Edit User Group Details – User Group Administrators	103
G 6.4.1.3	View Organization Details –Backup Security Officials.....	104
G 6.4.1.4	View/Edit Organization Details –Security Officials	105
G 6.4.1.5	Disassociate from this User Group – End Users	106
G 6.4.1.6	Disassociate from this User Group – User Group Administrators	108
G 6.4.1.7	Disassociate from this Organization – Backup Security Officials	110
G 6.4.1.8	Disassociate from this Organization –Security Officials	112
G 6.4.1.9	Request Access to a Provider/Supplier or /FI/Carrier/MAC Application	112
G 6.4.1.9.1	CARE Application	114
G 6.4.1.9.2	PQRI Application	115
G 6.4.1.9.3	PS&R Application	117
G 6.4.1.9.4	STAR Application	119
G 6.4.1.10	Remove Access from a Provider/Supplier or FI/Carrier/MAC Application.....	120
G 6.4.1.11	Associate this User Group to another Organization – Surrogate User Groups	123
G 6.4.2	Modify Provider/Supplier (or FI/Carrier/MAC) Profile – Additional Access Requests.....	129
G 6.4.2.1	Create a new User Group.....	131
G 6.4.2.2	Create a Provider (or FI/Carrier/MAC) User Group Within Your Organization	133
G 6.4.2.3	Create a Surrogate User Group Within Your Organization	134
G 6.4.2.4	Create a Provider (or FI/Carrier/MAC) User Group Outside Your Organization	136
G 6.4.2.5	Create a Surrogate User Group Outside Your Organization	141
G 6.4.2.6	Associate to a User Group as an Administrator – Within your Organization .	146
G 6.4.2.7	Associate to a User Group as an Administrator – Outside your Organization	149
G 6.4.2.8	Associate to a User Group as an End User.....	154
G 6.4.2.9	Create a New Organization	155
G 6.4.2.9.1	Create a New Organization – After Account Profile Modification	162
G 6.4.2.10	Associate to an Organization as a Backup Security Official.....	164
G 6.4.2.11	Create an Individual Practitioner Profile	170
G 6.5	Add Application.....	171
G 6.6	Add Community	172
G 6.7	Generic – Complete the Modify Account Profile Process.....	173
G 6.7.1	Generic – After Account Profile Modification	175
G 7.0	Additional IACS Procedures.....	176
G 7.1	Forgot Your Password?.....	176
G 7.2	Forgot Your User ID?	180
G 8.0	IACS Questions and Help	185

G 8.1	Frequently Asked Questions - FAQs	185
G 8.2	Be Proactive!	185
G 8.3	Online Training – IACS Computer-Based Training – CBT	185
G 8.4	Prepare Your Computer	188
G 8.5	Help Desk Information	188
G 9.0	Role Terms and Conditions Text.....	189
G 9.1	End User – Terms and Conditions	189
G 9.2	User Group Administrator – Terms and Conditions.....	189
G 9.3	Backup Security Official – Terms and Conditions	189
G 9.4	Security Official – Terms and Conditions	189
G 9.4	Individual Practitioner – Terms and Conditions	189

FIGURES

Figure G 1: Government Computer System WARNING/REMINDER Screen.....	6
Figure G 2: CMS Applications Portal Introduction Screen	7
Figure G 3: Account Management Screen.....	8
Figure G 4: New User Registration Menu Screen.....	9
Figure G 5: Terms and Conditions – Privacy Act Statement Screen	10
Figure G 6: New User Registration - Role Selection Screen	12
Figure G 7: Security Official - Terms and Conditions Screen	13
Figure G 8: New User Registration Screen – User Information	15
Figure G 9: Validation Failure Message – First Attempt	16
Figure G 10: Validation Failure Message – Second Attempt with Questions	17
Figure G 11: Validation Warning message – Invalid Question Answers.....	18
Figure G 12: Email Address Verification Screen.....	19
Figure G 13: Email Address Verification Email	20
Figure G 14: Email Address Verification Screen.....	21
Figure G 15: New User Registration Screen – Professional Contact Information.....	22
Figure G 16: End User – Access Request Area	24
Figure G 17: End User – Organization Search	25
Figure G 18: End User – Select Organization.....	27
Figure G 19: End User – User Group Selection.....	28
Figure G 20: End User – Justification for Action	28
Figure G 21: Review Registration Details Screen.....	30
Figure G 22: Registration Acknowledgement Screen	31
Figure G 23: Request Number Email	32
Figure G 24: User ID Email.....	32
Figure G 25: Temporary One-time Password Email	33
Figure G 26: User Group Administrator – Access Request Area.....	34
Figure G 27: User Group Administrator – Organization Search	36
Figure G 28: User Group Administrator – Select Organization	37
Figure G 29: User Group Administrator – Provider User Group Information	38
Figure G 30: User Group Administrator – Organization Search	40
Figure G 31: User Group Administrator – Select Organization	41
Figure G 32: User Group Administrator – Surrogate User Group Information	42
Figure G 33: User Group Administrator – Organization Search	44
Figure G 34: User Group Administrator – Select Organization	45
Figure G 35: User Group Administrator – User Group Selection	46
Figure G 36: User Group Administrator – Justification for Action	47
Figure G 37: Review Registration Details Screen.....	48
Figure G 38: Registration Acknowledgement Screen	49
Figure G 39: Request Number Email	50
Figure G 40: User ID Email.....	50
Figure G 41: Temporary One-time Password Email	51
Figure G 42: Backup Security Official – Organization Search	52
Figure G 43: Backup Security Official – Select Organization.....	53
Figure G 44: Backup Security Official – Justification for Action	54
Figure G 45: Backup Security Official – Review Registration Details Screen.....	55
Figure G 46: Registration Acknowledgement Screen	56
Figure G 47: Request Number Email	57
Figure G 48: User ID Email.....	57

Figure G 49: Temporary One-time Password Email	58
Figure G 50: Security Official – Organization Information.....	59
Figure G 51: Security Official – Justification for Action	61
Figure G 52: Security Official – Review Registration Details Screen.....	62
Figure G 53: Registration Acknowledgement Screen	63
Figure G 54: Request Number Email.....	64
Figure G 55: CP-575 Form – Request Email	65
Figure G 56: User ID Email.....	65
Figure G 57: Temporary One-time Password Email	66
Figure G 58: Registry End User – Access Request Area	67
Figure G 59: Registry End User – Justification for Action	68
Figure G 60: Review Registration Details Screen.....	69
Figure G 61: Registration Acknowledgement Screen	70
Figure G 62: Request Number Email.....	71
Figure G 63: User ID Email.....	71
Figure G 64: Temporary One-time Password Email	72
Figure G 65: CMS Applications Portal Introduction Screen	73
Figure G 66: Account Management Screen.....	74
Figure G 67: Login to IACS Screen	75
Figure G 68: Change Password Screen	76
Figure G 69: Change Password Policy Violation Message Screen	78
Figure G 70: My Profile – Change Answers to Authentication Questions Screen	79
Figure G 71: Change Answers to Authentication Questions Screen	79
Figure G 72: Change Answers Results Screen	80
Figure G 73: My Profile Screen.....	80
Figure G 74: CMS Applications Portal WARNING/REMINDER Screen	82
Figure G 75: CMS Applications Portal Introduction Screen	83
Figure G 76: Account Management Screen.....	84
Figure G 77: Login to IACS Screen	85
Figure G 78: My Profile Screen.....	86
Figure G 79: Modify User/Contact Information Screen	87
Figure G 80: Modify Request Confirmation Screen	88
Figure G 81: Modification Request Acknowledgement Screen.....	89
Figure G 82: CMS Applications Portal WARNING/REMINDER Screen	90
Figure G 83: CMS Applications Portal Introduction Screen	91
Figure G 84: Account Management Screen.....	92
Figure G 85: Login to IACS Screen	93
Figure G 86: My Profile Screen.....	94
Figure G 87: Modify Account Profile Screen.....	95
Figure G 88: Select Action Drop-down List.....	97
Figure G 89: View My Access Profile.....	98
Figure G 90: Pending Requests Table.....	98
Figure G 91: My Current Access Profile and Additional Access Requests	99
Figure G 92: Additional Access Requests Drop-down List	101
Figure G 93: My Current Access Profile Table – Action Drop-down List	102
Figure G 94: End User – View User Group Information Screen	103
Figure G 95: User Group Administrator – View/Edit User Group Information Screen	104
Figure G 96: Backup Security Official – Organization Information Screen	105
Figure G 97: Security Official – View/Edit Organization Information Screen	106
Figure G 98: Disassociate from this User Group – Select and Confirm Action.....	107
Figure G 99: Disassociate from this User Group – Select and Confirm Action.....	108

Figure G 100: Disassociate from this User Group – Warning Message	110
Figure G 101: Disassociate from this Organization – Select Action	111
Figure G 102: Disassociate from this Organization – Confirm Action	111
Figure G 103: Request Access to Applications – Select Application	113
Figure G 104: Request Access to Applications – Select Application	113
Figure G 105: CARE Application – Select Role Drop-down List	115
Figure G 106: PQRI Application – Select Role Drop-down List	117
Figure G 107: PS&R Application – Select Role Drop-down List	118
Figure G 108 : STAR Application – Select Role Drop-down List	120
Figure G 109: My Current Access Profile Table – Community and Application Roles.....	121
Figure G 110: Remove Access from PQRI Application – Select Action.....	122
Figure G 111: Remove Access from PQRI Application – Confirm and Justify Action.....	123
Figure G 112: FI/Carrier/MAC – Associate This User Group to Another Organization.....	124
Figure G 113: Provider/Supplier – Associate This User Group to Another Organization.....	125
Figure G 114: User Group Administrator – Terms and Conditions Screen.....	126
Figure G 115: Associate Group to Organization – Organization Search	127
Figure G 116: Associate Group to Organization – Select Organization.....	128
Figure G 117: Associate Group to Organization – Justify Action	129
Figure G 118: Additional Access Requests Drop-down List	130
Figure G 119: User Group Creation Options – Within or Outside your Organization.....	131
Figure G 120: User Group Creation Options – Provider (or FI/Carrier/MAC) or Surrogate User Group	132
Figure G 121: Provider User Group Information	133
Figure G 122: Surrogate User Group Information.....	135
Figure G 123: User Group Administrator – Organization Search	137
Figure G 124: User Group Administrator – Select Organization	138
Figure G 125: User Group Creation Options – Provider (or FI/Carrier/MAC) or Surrogate User Group	139
Figure G 126: User Group Administrator – Provider (or FI/Carrier/MAC) User Group Information	140
Figure G 127: User Group Administrator – Organization Search	142
Figure G 128: User Group Administrator – Select Organization	143
Figure G 129: User Group Creation Options – Provider (or FI/Carrier/MAC) or Surrogate User Group	144
Figure G 130: User Group Administrator –Surrogate User Group Information	145
Figure G 131: Associate to a User Group – Within or Outside Your Organization	147
Figure G 132: Associate to a User Group – Select User Group	148
Figure G 133: Associate to a User Group – Justify Action.....	149
Figure G 134: Associate to a User Group – Within or Outside	150
Figure G 135: Associate to a User Group – Organization Search	151
Figure G 136: User Group Administrator – Select Organization	152
Figure G 137: User Group Administrator – Select User Group.....	153
Figure G 138: Associate to a User Group – Justify Action.....	154
Figure G 139: Create a New Organization.....	156
Figure G 140: Terms and Conditions – Security Official Screen	157
Figure G 141: Organization Information Screen	158
Figure G 142: Create New Organization – Justify Action	160
Figure G 143: Modify Request Confirmation Screen	161
Figure G 144: Modification Request Acknowledgement Screen.....	162
Figure G 145: Request Number Email	163
Figure G 146: CP-575 Form – Request Email	163

Figure G 147: Associate to an Organization as a Backup Security Official 165

Figure G 148: Backup Security Official – Terms and Conditions Screen..... 166

Figure G 149: Associate to Organization – Organization Search Screen 167

Figure G 150: Associate to Organization – Select Organization..... 168

Figure G 151: Associate to Organization – Justify Action 169

Figure G 152: Create an Individual Practitioner Profile – Justify Action 170

Figure G 153: Select Action – Add Application 171

Figure G 154: Select Application Drop-down List 171

Figure 155: Select Action – Add Community 172

Figure G 156: Select Community Drop-down List..... 173

Figure G 157: Modify Request Confirmation Screen 174

Figure G 158: Modification Request Acknowledgement Screen..... 175

Figure G 159: Login to IACS Screen 176

Figure G 160: Security Questions Screen 177

Figure G 161: Password Identify User Screen..... 178

Figure G 162: Password Email Notification Screen 179

Figure G 163: Password Notification Email 179

Figure G 164: Account Management Screen – Forgot Your User ID? Hyperlink..... 181

Figure G 165: Forgot Your User ID? Screen 182

Figure G 166: User ID Recovery - Authentication Screen 183

Figure G 167: User ID Recovery Confirmation Screen..... 184

Figure G 168: User ID Email..... 184

Figure G 169: Account Management Screen – Computer-Based Training Hyperlink..... 186

Figure G 170: IACS CBT Main Menu Screen 187

Important Note

If you are an Individual Practitioner who wishes to register as a ***sole provider***, i.e., only one IACS user in your practice will register to access CMS Provider applications integrated with IACS, please review the ***IACS User Guide Attachment F – Individual Practitioner*** for your registration information.

If, however, your Organization expects to register more than one IACS user to access CMS Provider applications integrated with IACS, use this ***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 individuals wishing to register in the CMS **Provider/Supplier** and **FI/Carrier/MAC** User Communities.

- **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. This role applies only to the Provider/Supplier User Community.
 - 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).
 - In the above cases, the user's **Individual Practitioner** access in IACS will be disabled and any access to applications associated with that role will be removed.

G 1.0 Introduction

G 1.1 Purpose

This **IACS User Guide Attachment G** describes the procedures for registering and provisioning individuals in the Provider/Supplier and FI/Carrier/MAC User Communities using the Individuals Authorized Access to the 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.

G 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.

G 1.3 How to Use this User Guide

This **IACS User Guide, Attachment G** provides screens and procedures that are common to all IACS users. This includes such things 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
- Modifying IACS account profile information
- 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.

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

- Completing the Required Access portion of the New User Registration screen for End Users, Approvers, and other roles, as required
- Modifying registration details after the initial registration has been approved and provisioned.

G 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.

G 1.5 Additional IACS Help Documents

This **IACS User Guide** Attachment G and accompanying IACS help documents, **Attachments** and **Quick Reference Guides**, include information regarding new and/or modified IACS screens and functionalities up to and including Software Release 4.4.7, January 2009.

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 will soon be added as discussed in Section G 8 of this User Guide Attachment. 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. Currently, this functionality is only available to those IACS users who enter a Date of Birth during their IACS registration process.

Attachments have been added to the CMS IACS website to provide additional information and instructions for IACS users.

- **User Guide Main Body** – has been updated to include generic IACS functions for all roles.
- **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 H – Demonstrations Community** – has been added for additional information on all roles and modifications to IACS account profiles.
- **Attachment J – CMS Contractor Community** – has been added for additional information on all roles and modifications to IACS account profiles.
- **User Guide for Approvers** – has been added for IACS Approvers and EPOCS.

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 – MA/MA-PD/PDP/CC and CBO/CSR Accounts**
- **IACS Approver – COB, HETS UI and Community User Accounts**

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 New User Registration – Registry End User**

- **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 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**

G 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. These differences should not affect your ability to request desired accesses or perform desired activities.

G 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 and FI/Carrier/MAC User Communities and/or request access to additional CMS User Communities.

G 2.1 Accessing IACS New User Registration

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

Action: Go to <https://applications.cms.hhs.gov> on the CMS website.

The CMS Applications Portal WARNING/REMINDER screen will display as illustrated in Figure G 1.

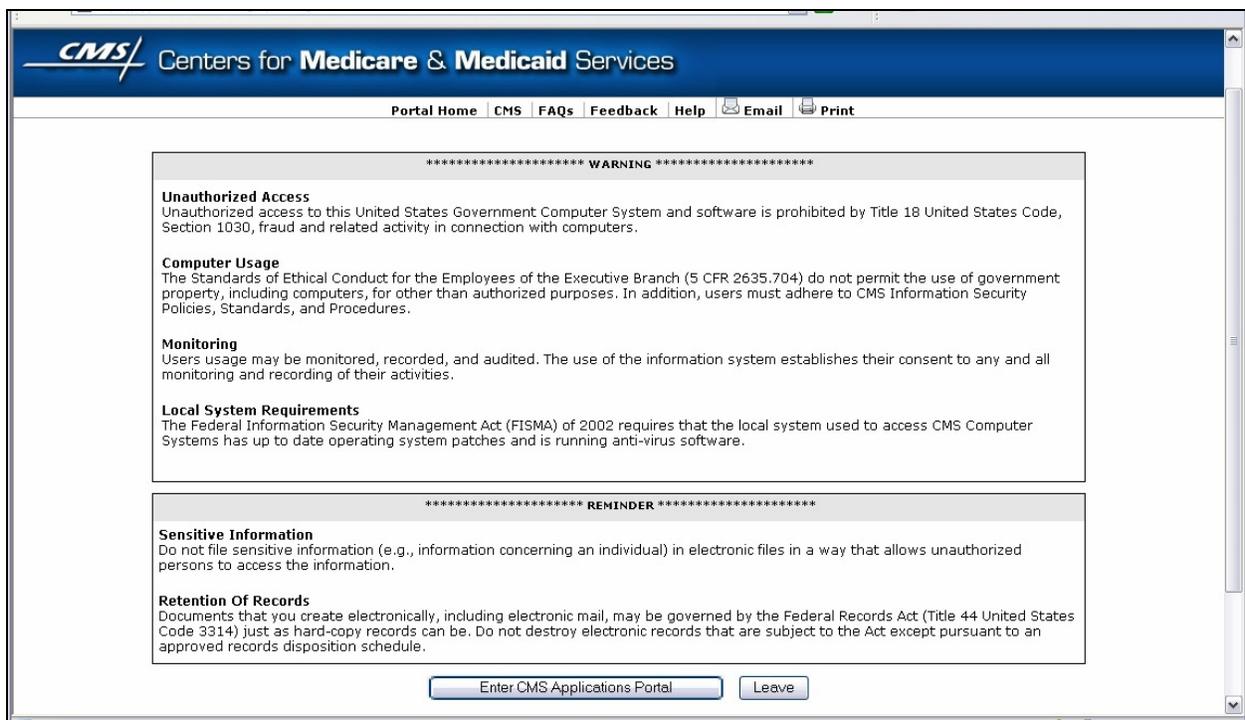


Figure G 1: Government Computer System WARNING/REMINDER Screen

Action: Read the important information on this screen and indicate your agreement by selecting the select **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 Application Portal Introduction screen will display as illustrated in Figure G 2.

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

CMS Centers for **Medicare & Medicaid** Services

Portal Home | CMS | FAQs | Feedback | Help | Email | Print

Introduction | **Account Management** | Plans | Providers

CMS Applications Portal Introduction

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

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

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

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

[Department of Health & Human Services](#) | [Medicare.gov](#) | [Firstgov.gov](#)
[Email Updates](#) | [Privacy Policy](#) | [Freedom of Information Act](#)
Centers for Medicare & Medicaid Services, 7500 Security Boulevard Baltimore, MD 21244

Figure G 2: CMS Applications Portal Introduction Screen

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

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

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

CMS Centers for **Medicare & Medicaid** Services

Portal Home | CMS | FAQs | Feedback | Help | Email | Print

Introduction | Account Management | Plans | Providers

Account Management

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

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

Important Messages

Do not disclose or lend your IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions. Sharing of accounts may lead to termination of system access privileges and /or adverse action up to and including legal prosecution.

Help Resources

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

Figure G 3: Account Management Screen

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

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

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



Figure G 4: New User Registration Menu Screen

Action: Select the hyperlink for the community in which you wish to register in the top portion of the screen.

Note: You should select either the Provider/Supplier or FI/Carrier/MAC User Community link if you are using this User Guide Attachment.

Note: The top part of the menu screen displays the **New User Registration Menu for CMS User Communities**.

The CMS Computer Systems Security Requirements **Terms and Conditions** screen will display as illustrated in Figure G 5.

This screen contains the *Privacy Act Statement* and the *Rules of Behavior* which present the terms and conditions for accessing CMS computer systems.

You must accept them in order to be authorized to access CMS systems and applications.

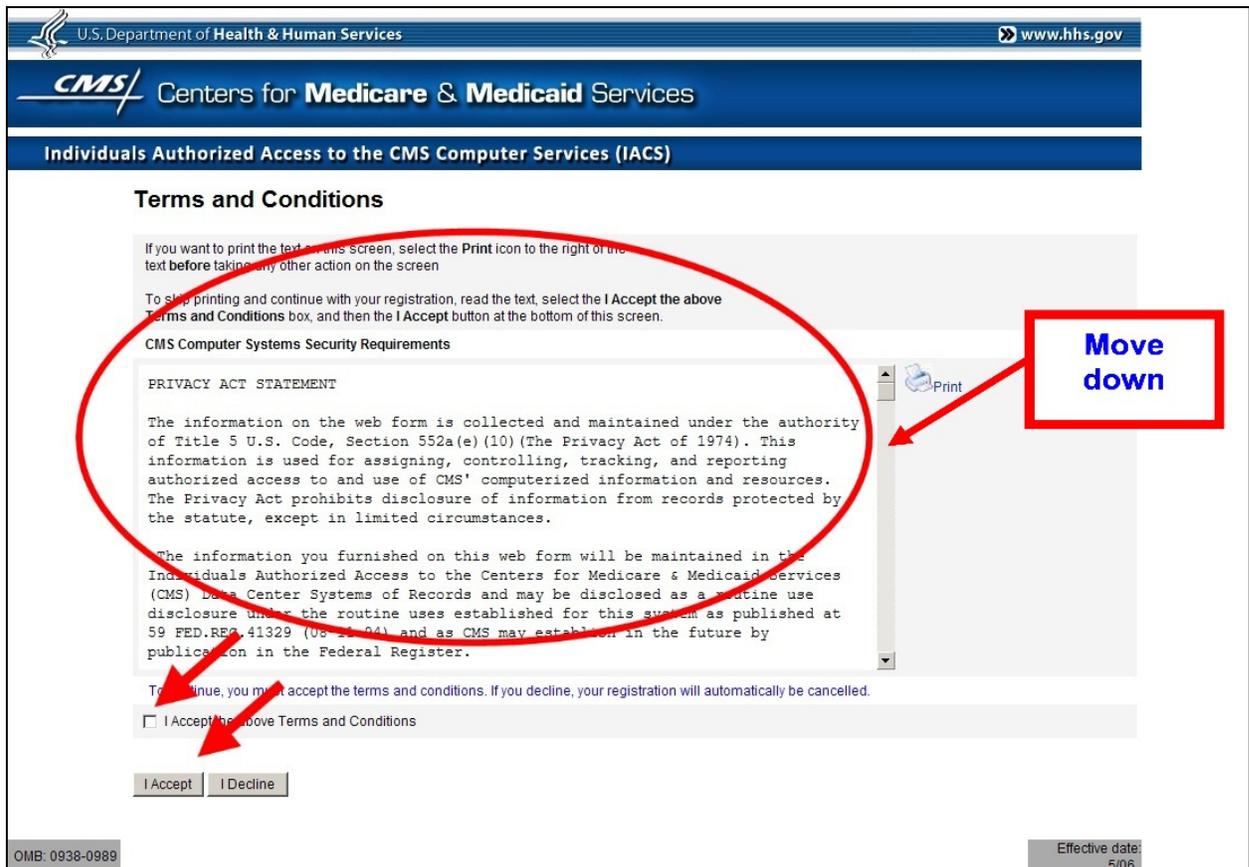


Figure G 5: Terms and Conditions – Privacy Act Statement Screen

Action: Read all of the **Terms and Conditions** on the screen by 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 as illustrated in Figure G 2.

G 2.1 New User Registration – Role Selection

After you select the **I Accept the above Terms and Conditions** box and the **I Accept** button, the **New User Registration, Role Selection** screen will display as illustrated in Figure G 6: . This screen allows you to select your desired role.

The possible roles include:

- **Registry End User** – A Registry End User is part of the Registry Organization and/or Registry User Group, and can also request access to CMS applications.
- **Individual Practitioner** – An Individual Practitioner is a physician or non-physician Medicare practitioner.

Note: This role applies only to the Provider/Supplier User Community.

- If you are an Individual Practitioner who wishes to **register as a sole provider**, i.e., only one IACS user in your practice will register to access CMS Provider applications integrated with IACS, please access the IACS User Guide Attachment F – Individual Practitioner for your registration information.
- If, however, your Organization expects to register **more than one IACS user** to access CMS Provider applications integrated with IACS, use this Attachment F and related Provider/Supplier Quick Reference Guides for your IACS registration and Account Management information and instructions.
- **End User** – An End User is a staff member who is trusted to perform Medicare business for the Organization.
 - An End User is part of a User Group within the Organization.
- **User Group Administrator** – The person who registers with IACS as a User Group Administrator.
 - This person also registers the User Group within an Organization.
 - This person is trusted to approve the access requests of End Users for that User Group.
 - This person also has the ability to update User Group profile information.
- **Backup Security Official** – A Backup Security Official performs many of the same functions as a Security Official (see below) in an Organization.
 - There can be one or more Backup Security Officials in an Organization.

- The Backup Security Official can approve the access requests of User Group Administrators and may assist the Organization's Security Official with other administrative tasks.
- **Security Official** – The Security Official is the authorized representative of his/her Organization and registers the Organization in IACS.
 - There can be only one Security Official in an Organization.
 - The Security Official is trusted to approve the access requests of Backup Security Officials.
 - The Security Official can approve the access requests of User Group Administrators.
 - The Security Official can approve the creation of Surrogate User Groups.
 - The Security Official is the only individual who can update the information in the Organization profile in IACS.

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

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

New User Registration

Please select the Role

- Individual Practitioner** - A physician or non-physician practitioner. The Individual Practitioner may request access to CMS applications.
- End User** - Requests approval to join an appropriate, work related organization and user group. The End User may request access to CMS applications.
- User Group Administrator** - Creates user groups for users to join, including surrogate user groups. A User Group Administrator has the ability to approve End User requests to join a user group as well as update a user group's profile. The User Group Administrator may request access to CMS applications.
- Backup Security Official** - Has authorizations similar to those of the Security Official such as user groups and User Group Administrator's approvals, etc. One key exception is the authorization to approve other Backup Security Officials.
- Security Official** - Creates organizations for users to join, approves provider and surrogate user groups. A Security Official has the ability to approve Backup Security Officials and User Group Administrators. A Security Official also has the ability to update an organization's profile.
- Registry End User** - Requests approval to join a Registry organization and Registry user group. The Registry End User may request access to CMS applications.

Next Cancel

OMB: 0938-0020 Effective date: ▾

Figure G 6: New User Registration - Role Selection Screen

Action: Select the radio button to the left of your desired *Role*.

Note: Figure G 6 lists the roles available in the Provider/Supplier community. The roles of **Individual Practitioner** and **Registry End User** are not available in the FI/Carrier/MAC community.

Action: Select the **Next** button.

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

Action: Read all of the **Terms and Conditions** for your selected role by moving down the screen as needed.

Note: An example of this role-specific **Terms and Conditions** screen for the role of Security Official is illustrated in Figure G 7. Different screens will display for the Backup Security Official, the User Group Administrator, and End User.

Note: The full text of the **Terms and Conditions** screen for each role is provided in Section G 6.0 of this help document. For the role of End User, refer to Section G 6.1. For the role User Group Administrator, refer to Section G 6.2. For the role of Backup Security Official, refer to Section G 6.3. For the role of Security Official, refer to Section G 6.4.

Note: If you are an Individual Practitioner, refer to IACS User Guide - Attachment F, Individual Practitioner, for user registration instructions.

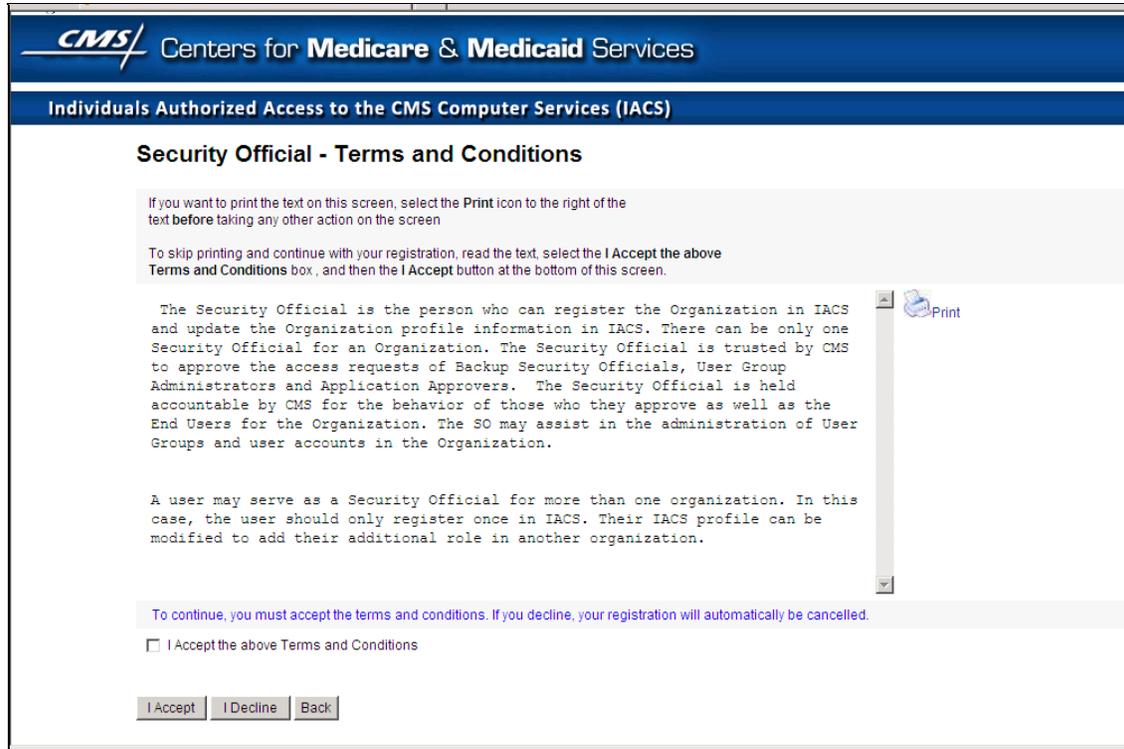


Figure G 7: Security Official - Terms and Conditions Screen

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 G 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 G 6 and select the correct role.

G 2.2 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 G 8.

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

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

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

New User Registration

CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.

User Information

First Name: * MI: Last Name: *

Social Security Number: * Valid SSN Format is XXX-XX-XXXX Date of Birth: * Valid Date of Birth format is mm/dd/yyyy

E-mail: * Confirm E-mail: *

Valid Email Format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

* indicates a required field

OMB: 0938-0988 Effective date
5/06

Figure G 8: New User Registration Screen – User Information

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.

Note: The SSA validation service is not available from 1 AM to 5 AM (EST) Sundays to Fridays, and Saturdays from 11 PM to Sundays 5 AM (EST).

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 G 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.

G 2.2.1 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 G 9.

The screenshot shows the 'New User Registration' page from the CMS website. The page header includes 'U.S. Department of Health & Human Services' and 'www.hhs.gov'. Below the header is the CMS logo and 'Centers for Medicare & Medicaid Services'. The main content area is titled 'New User Registration' and contains a form for user information. The form fields are: First Name (Agugheo), MI (S), Last Name (Mikhayenko), Social Security Number (751-00-0000), Date of Birth (09/24/1959), E-mail (agugheo@gugen.com), and Confirm E-mail (agugheo@gugen.com). A red arrow points to a red error message below the form: 'Your details cannot be validated against the Social Security Administration. Please ensure that correct details are entered above and click Next. After 3 failed attempts, your registration will be cancelled.' There are 'Next' and 'Cancel' buttons at the bottom of the form. A footer contains 'MB: 0938-0989' and 'Effective date 5/08'.

Figure G 9: Validation Failure Message – First Attempt

- 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 G 10.

G 2.2.2 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 G 10. These questions are being asked to ensure that the registration request is not being generated by an automated system.

The screenshot shows the 'New User Registration' page from the U.S. Department of Health & Human Services. The page title is 'New User Registration'. Below the title, there is a message: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' The 'User Information' section contains several input fields: 'First Name' (Agugheo), 'MI' (S), 'Last Name' (Mikhaylenko), 'Social Security Number' (751-00-0000), 'Date of Birth' (09/24/1959), 'E-mail' (agugheo@gugen.com), and 'Confirm E-mail' (agugheo@gugen.com). Below these fields, there are two questions: 'What is 2 + 2?' and 'What color is green grass?'. A message below the questions states: 'You have been presented with two simple validation questions because the details you entered could not be validated with the Social Security Administration. Please provide correct answers and click Next.' At the bottom of the form, there are 'Next' and 'Cancel' buttons. The footer of the page includes 'DMB: 0938-0989' and 'Effective date: 5/08'.

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

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, 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 G 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 G 9.

The screenshot shows the 'New User Registration' page for the U.S. Department of Health & Human Services. The page title is 'New User Registration'. Below the title, there is a message: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' The 'User Information' section contains several fields: First Name (Agugheo), MI (S), Last Name (Mikhaylenko), Social Security Number (751-00-0000), Date of Birth (07/05/1968), E-mail (agugheo@gugen.com), and Confirm E-mail (agugheo@gugen.com). Below these fields, a warning message states: '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.' A table shows two validation questions: 'What is 2 + 2?' with the answer '4' and 'What color is green grass?' with the answer 'Brown'. A note below the table says: 'You have been presented with two simple validation questions because the details you entered could not be validated with the Social Security Administration. Please provide correct answers and click Next.' The page also includes 'Next' and 'Cancel' buttons, and footer information: 'OMB: 0938-0989' and 'Effective date 5/06'.

Figure G 11: Validation Warning message – Invalid Question Answers

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, 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 the information you entered is *successfully* validated, the **Email Address Verification** screen will display as illustrated in Figure G 12.

G 2.2.3 Validation Success

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

Figure G 12: Email Address Verification Screen

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 G 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.

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 verification code appears here>

Do not cut and paste the code from the e-mail to the IACS screen. Please re-type the code and do not add any extra spaces in the beginning or end of the code.

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 13: Email Address Verification Email

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 G 2.

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

Figure G 14: Email Address Verification Screen

Action: Enter the **Verification Code** in the **Verification Code** field on the **Email Address Verification** screen as illustrated in Figure G 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 G 15. This screen has additional sections for you to complete.

G 2.3 Entering Professional Contact Information

The top portion of the **New User Registration** screen illustrated in Figure G 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, you are required to enter information on where you can be contacted on a professional basis.

Beneath the **Professional Contact Information** portion of the screen, an **Access Request** area will display. This area will display the User Community and Role you selected earlier.

The screenshot shows the 'New User Registration' screen for the U.S. Department of Health & Human Services. The page header includes the CMS logo and 'Centers for Medicare & Medicaid Services'. Below the header, it states 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'New User Registration'. A message indicates that CMS is authorized to validate personal information using legal name, date of birth, and Social Security Number. The form is divided into three sections: 'User Information', 'Professional Contact Information', and 'Access Request'. The 'User Information' section includes fields for First Name (Waxamdee), MI (Y), Last Name (Mikhaylenko), Social Security Number (382-00-0000), Date of Birth (09/24/1959), E-mail (sispnm@vbugwb.com), and Confirm E-mail (sispnm@vbugwb.com). The 'Professional Contact Information' section includes Office Telephone (301-100-0000), Ext (382), Company Name (Waxamdee Mikhaylenko), Company Telephone (301-100-0000), Ext, Country (United States), Address 1 (1165 W. Williams), Address 2, City (Paint), State/Territory (MD), and Zip Code (37545 - 3754). The 'Access Request' section shows 'Community Type' as 'Provider/Supplier'.

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

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

Note: If you need help or have questions and are registering for the Provider/Supplier Community, 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 EUSsupport@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.

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 G 2.

G 2.4 Completing Your Registration

Beneath the **Professional Contact Information** portion of the **New User Registration** screen, an **Access Request** area will display. This area contains information and input fields that are specific to the different roles in the Provider/Supplier and FI/Carrier/MAC User Communities.

These role-specific input fields, and the instructions for completing them, are provided in Section G 3.0 of this IACS User Guide Attachment.

- For information regarding an **End User**, see Section 3.1.
- For information regarding a **User Group Administrator**, see Section 3.2.
- For information regarding a **Backup Security Official**, see Section 3.3.
- For information regarding a **Security Official**, see Section 3.4.
- For information regarding a **Registry End User**, see Section 3.5.

G 3.0 Role Specific Registration Request Steps

The following sections and subsection provide information and instruction on how to register for the various roles available in the roles in the Provider/Supplier and FI/Carrier/MAC User Communities.

G 3.1 End User

In the **Access Request** portion of the **New User Registration** screen the Community Type, **Provider/Supplier** or **FI/Carrier/MAC**, and the Role that you selected, **End User** are displayed as illustrated in Figure G 17.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The processes and screens illustrated apply to the FI/Carrier/MAC community with minor differences in some of the information collected by IACS for the two different User Communities.

Access Request

Community Type: Provider/Supplier

Role: End User

Organization Search

Search for the Organization you want to find the User Group in. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: United States *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Justification for Action:

* indicates a required field

Effective date

Figure G 16: End User – Access Request Area

Below these fields, additional input fields, specific to your selected community and role are displayed.

G 3.1.1 End User – Associating With a User Group

As part of the process for requesting access as an End User, you must associate with a specific User Group within an Organization. This is a simple two step process.

1. Select your Organization.
2. Select the correct User Group in your Organization.

The first action you must take is to select the Organization with which the User Group is associated. To do this you must search IACS for the Organization.

You must provide, at a minimum, all or part of the Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

The screenshot shows a web form titled "Access Request". Under "Community Type", it is set to "Provider/Supplier" and "Role" is "End User". The "Organization Search" section contains the following fields:

- TIN / SSN: [text input]
- Legal Business Name: [text input] *
- Country: [dropdown menu] United States *
- City: [text input] State/Territory: [dropdown menu] *

 A "Search" button is located below these fields. A blue note states: "Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search." Below the search fields is a "Justification for Action" text area. At the bottom left are "Next" and "Cancel" buttons. At the bottom right, a small text says "* indicates a required field". The footer of the form includes "OIR: 0038-0080" and "Effective date".

Figure G 17: End User – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **New User Registration** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with those illustrated in Figure G 18.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - The Security Official's request to establish the Organization may not be approved yet.
 - The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

The screenshot displays a web form for selecting an organization for an end user. At the top, there are address fields: 'Address 1' (222 Caton Ave), 'Address 2' (empty), 'City' (Baltimore), 'State/Territory' (MD), and 'Zip Code' (21226). Below this is an 'EDC Assigned User ID' field. The 'Access Request' section shows 'Community Type' as 'Provider/Supplier' and 'Role' as 'End User'. The 'Organization Details' section instructs the user to select an organization from a list. A dropdown menu is open, showing 'Saint Joseph Medical Center (Baltimore, MD)' as the selected option. A 'New Search' button and a link to search for a new organization are also visible. A 'Justification for Action' field is present but empty. The form includes 'Next' and 'Cancel' buttons at the bottom left. In the bottom right corner, there is a note: '* indicates a required field'. The footer of the page shows 'OMB: 0938-0989' on the left and 'Effective date 5/06' on the right.

Figure G 18: End User – Select Organization

Action: Select your desired **Organization** from the drop-down list in the *Organizations* field.

If you want to search for a different organization, select the **New Search** button.

Note: If more than one Organization is found, the drop-down list will display them all. The example used in the figure illustrates only one Organization.

When you select your Organization, the screen will refresh again and display a new *User Groups* field. This field will contain a drop-down list of all the User Groups associated with the Organization you have selected. This drop-down list is illustrated in the example in Figure G 19.

Note: If there are no User Groups associated with the selected Organization, a message will appear on the screen below the Organizations field indicating this.

Access Request

Community Type: [Provider/Supplier](#)

i Role: End User

Organization Details

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): * [Click 'New Search' to search for a new Organization](#)

i User Group(s): *

Justification for Action:

OMB: 0938-0989 Effective date 5/06

Figure G 19: End User – User Group Selection

Action: Select your desired *User Group* from the drop-down list in the *User Groups* field. After you have selected your Organization and User Group, you must enter a justification statement indicating the reason you are requesting this action.

Access Request

Community Type: [Provider/Supplier](#)

i Role: End User

Organization Details

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): * [Click 'New Search' to search for a new Organization](#)

i User Group(s): *

Justification for Action:

*

OMB: 0938-0989 Effective date 5/06

Figure G 20: End User – Justification for Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require association with user group for work*, etc.

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

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.

- 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.

G 3.1.2 End User – 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 that you have entered in the **New User Registration** screen.

An example of this screen, the **Review Registration Details** screen, is illustrated in Figure G 21.

Note: Figure G 21 is only an example of the **Review Registration Details** screen. The information on this screen will vary depending on your community and role.

Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Review Registration Details

The following is the information you entered on the New User Registration Form.
Please review the information below to verify correctness.

- To modify any of the information, click 'Edit'.
- If the information is correct and you wish to proceed, click 'Submit'.

First Name:	Ron	MI:		Last Name:	Hood
Social Security Number:	*****7622				
Date of Birth:	01/01/1980				
E-mail:	hood@wess.com				
Office Telephone:	222-555-4343				
Company Name:	Greg's co			Company Telephone:	
Country:	United States				
Address 1:	121 Rolling rd			Address 2:	
City:	Catonsville	State/Territory:	MD	Zip Code:	21228
User/Community Type:	Provider/Supplier				
Role:	End User				
Organization:	Greg's co (Baltimore, MD)				
User Group:	Accounting				

Submit Edit Cancel

Figure G 21: Review Registration Details Screen

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 G 22.

- Select the **Edit** button if there is registration 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.
- If you select the **Cancel** button, the 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.

The screenshot shows the 'Registration Acknowledgement' screen. At the top, there is a header for the U.S. Department of Health & Human Services and the CMS Centers for Medicare & Medicaid Services. Below this, the title 'Individuals Authorized Access to the CMS Computer Services (IACS)' is displayed. The main content area is titled 'Registration Acknowledgement' and contains the following text: 'Your IACS request has been successfully submitted.' followed by a 'Print' icon. Below that, it states: 'The tracking number for your request is: REQ-1215448816445. Please use this number in all correspondences concerning this request.' and 'You will be contacted via e-mail after your request has been processed.' At the bottom of the main content area, it says: 'Click 'OK' to close your browser window.' There is an 'OK' button below this text. In the bottom left corner, there is a box with 'OMB: 0938-0989' and in the bottom right corner, a box with 'Effective date 5/06'.

Figure G 22: 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 G 3.

G 3.1.3 End User – 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. Figure G 23 presents an example of the email providing your Request Number. You should use that request number if you need to contact your Help Desk regarding your request.

If you are registering in the Provider/Supplier community and 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@cgi.com.

Please have your request number from the Registration Acknowledgement screen available when calling your Help Desk. If you email your Help Desk, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

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

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

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 23: Request Number Email

Your Approver will be notified of your pending request via email. Once your request has been approved and 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 G 24.
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 G 25.

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.

Figure G 24: User ID Email

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

The tracking number for your request is REQ-*<your tracking number will appear here>*. Your temporary one-time password is the first two letters of your last name (1st letter upper case, 2nd – lower case) and the last 6 digits of your Social Security Number. Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>
Read the Privacy Statement and click Enter.
Select the **Account Management** link on the top, and then the **My Profile** link.
Log into IACS using your User ID and password to change your password.

Unauthorized access to this United States Government Computer System and software is prohibited by Title 18 United States Code, Chapter 47 Section 1030, fraud and related activity in connection with computers.
Knowingly accessing a Federal information system inappropriately is a punishable offense subject to fines and up to 20 years imprisonment.

Do not disclose or lend you IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions.

Please review the Department of Health and Human Services Rules of Behavior regarding DHHS/CMS Policies at <http://www.hhs.gov/ocio/policy/2008-0001.003s.html>

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 25: Temporary One-time Password Email

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.

G 3.2 User Group Administrator

In the **Access Request** portion of the **New User Registration** screen the Community Type, **Provider/Supplier** or **FI/Carrier/MAC**, and the Role that you selected, **User Group Administrator** are displayed as illustrated in Figure G 26.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The processes and screens illustrated apply to the FI/Carrier/MAC community as well.

Below these fields, additional input fields, specific to your selected community and role are displayed.

A **User Group Administrator** is the organization official who:

1. **Creates** and registers User Groups within an Organization.
2. **Approves** End User access requests within the User Group he/she administers.

As a **User Group Administrator**, several **Action** selections are presented to you during your initial IACS registration. Each **Action** selection has a radio button to the left for you to select that action as illustrated in Figure G 26.

Figure G 26: User Group Administrator – Access Request Area

Action: Select the **Action** you want to take by selecting the radio button to the left of the action item.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The text and names of the actions listed will vary slightly for the FI/Carrier/MAC community users.

Your options and some details about them are:

- **Create a Provider User Group** – Select this action if you want to create a Provider User Group.
 - A Provider User Group is **a narrowly focused entity** within an Organization.
 - An example of a Provider User Group would be a physical therapy group in a hospital.
 - If this is the action you want to take, continue to Section 3.2.1 below.
- **Create a Surrogate User Group** – Select this action if you want to create a Surrogate User Group.

- A Surrogate User Group is a group that is working on behalf of an existing Organization.
- An example of a Surrogate User Group would be a billing agency that works on behalf of a medical association may be a Surrogate Group within a hospital Organization.
- If this is the action you want to take, go to Section 3.2.2.
- **Associate to an Existing User Group** – Select this action if you want to associate to an existing User Group.
 - User Groups are allowed to have more than one User Group Administrator.
 - If this is the action you want to take, go to Section 3.2.3.

G 3.2.1 User Group Administrator – Create a Provider User Group

If you select **Create a Provider User Group**, the screen will refresh and display two new input areas. These are **Organization Search** and **Provider User Group Information** input areas and are illustrated in Figure G 27.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The text and names of the actions listed will vary slightly for the FI/Carrier/MAC community users.

A Provider User Group must be associated with an Organization. Therefore, your first step is to select the Organization to which your Provider User Group will be associated. This is a simple two step process.

1. Search IACS to find your Organization.
2. Select the Organization for your Provider User Group.

Organization Search

Search for the Organization you want to associate with. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Provider User Group Information

TIN / SSN:

User Group Name: * *Please provide a unique Group Name.*

Company Telephone: * Ext: *Valid Telephone Number Format is XXX-XXX-XXXX*

Company Fax: Ext: *Valid Fax Number Format is XXX-XXX-XXXX*

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Group Size: * *Specify the expected size of your User Group.*

Justification for:

Figure G 27: User Group Administrator – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **New User Registration** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

You must provide, at a minimum, all or part of the Legal Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 28.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - The Security Official’s request to establish the Organization may not be approved yet.
 - The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

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

- Community Type:** Provider/Supplier
- Role:** User Group Administrator
- Action:**
 - Create a Provider User Group
 - Create a Surrogate User Group
 - Associate to an Existing User Group
- Organization(s):** Select an Organization * (Dropdown menu is open showing:
 - Select an Organization
 - Select an Organization
 - St Joseph @balto, MD)
 - Saint Joseph's Hospital (Towson, MD)
 - So Co 1 (Columbia, MD)
)
- TIN / SSN:** *
- User Group Name:** * Please provide a unique Group Name.
- Company Telephone:** * Ext: * Valid Telephone Number Format is XXX-XXX-XXXX
- Company Fax:** * Ext: * Valid Fax Number Format is XXX-XXX-XXXX
- Country:** United States *
- Address 1:** * **Address 2:** *
- City:** * **State/Territory:** * **Zip Code:** * - *
- Expected Group Size:** * Specify the expected size of your User Group.
- Justification for Action:** (Text area)

* indicates a required field

OMB: 0938-0989 Effective date: 6/06

Figure G 28: User Group Administrator – Select Organization

Action: Select your desired **Organization** from the drop-down list in the *Organizations* field.

If you want to search for a different organization, select the **New Search** button.

After you have selected the desired Organization, you must input the information on the Provider User Group you want to create in the input fields illustrated in Figure G 29.

Organization Search

Search for the Organization you want to associate with. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Provider User Group Information

TIN / SSN:

User Group Name: * Please provide a unique Group Name.

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Group Size: * Specify the expected size of your User Group.

Justification for:

Figure G 29: User Group Administrator – Provider User Group Information

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define the User Group.

Action: Enter the **Taxpayer Identification Number**, TIN, or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the User Group in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Action: Enter the **User Group Name** in the *User Group Name* field. The User Group name must be unique within the Organization. The User Group Name must be the Legal Business Name associated with the TIN or SSN. The legal business name is the name specified on the IRS CP-575 Form.

Action: Enter the correspondence information for the User Group in the *Company Telephone, Country, Address 1, City, State/Territory, and Zip Code* fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will change to allow the entry of foreign address information such as Province or Postal Code.

Action: Enter the number of people you expect to register in IACS for the User Group in the *Expected Group Size* field.

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

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. The top part of the screen will be shown with warning messages informing you of data that needs to be corrected or required fields that still need to be filled in.

For instructions on how to complete your registration, go to Section 3.2.4.

G 3.2.2 User Group Administrator – Create a Surrogate User Group

If you select **Create a Surrogate User Group**, the screen will refresh and display two new input areas. These are **Organization Search** and **Surrogate User Group Information** input areas and are illustrated in Figure G 30.

A Surrogate User Group must be associated with an Organization. Therefore, your first step is to select the Organization to which your Surrogate User Group will be associated. This is a simple two step process.

1. Search IACS to find your Organization.
2. Select the Organization for your Surrogate User Group.

Figure G 30: User Group Administrator – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **New User Registration** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

You must provide, at a minimum, all or part of the Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

Action: Select the **Search** button.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 31.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official’s request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

The screenshot shows the 'Access Request' form. The 'Community Type' is 'Provider/Supplier' and the 'Role' is 'User Group Administrator'. Under 'Action', 'Create a Surrogate User Group' is selected. In the 'Surrogate User' section, the 'Organization(s)' dropdown menu is open, showing a list of organizations including 'ST Joseph (Baltimore, MD)', 'Saint Joseph's Hospital (Towson, MD)', and 'So Co 1 (Columbia, MD)'. Other fields include 'Legal Business Name', 'Company Telephone', 'Company Fax', 'Country', 'Address 1', 'Address 2', 'City', 'State/Territory', 'Zip Code', and 'Expected Group Size'. A 'Justification for Action' text area is also present. At the bottom, there are 'Next' and 'Cancel' buttons and a footer with 'OMB: 0938-0989'.

Figure G 31: User Group Administrator – Select Organization

Action: Select your desired *Organization* from the drop-down list in the *Organizations* field.

If you want to search for a different organization, select the **New Search** button.

After you have selected the desired Organization, you must input the information on the Surrogate User Group you want to create in the input fields illustrated in Figure G 31.

Organization Search

Search for the Organization you want to associate with. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search'
You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Surrogate User Group Information

TIN / SSN: * CMS Certification Number: CMS Certification Number (formerly known as OSCAR Number) pertains to Medicare Part-A

Legal Business Name: * The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Group Size: * Specify the expected size of your User Group.

Figure G 32: User Group Administrator – Surrogate User Group Information

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define the User Group.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The names of input fields listed will vary slightly for the FI/Carrier/MAC community users.

Action: Enter the **Taxpayer Identification Number**, TIN, or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the Surrogate User Group in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Note: The **CMS Certification Number** was previously known as the OSCAR Number and pertains to Medicare Part A Institutional Providers. Enter this number if the Surrogate User Group has one.

Note: Provide any required information for the FI/Carrier/MAC community that is requested by IACS. One example of this additional information would be the Medicare Contractor ID number.

Action: Enter the **Legal Business Name** of the User Group. The User Group name must be unique within the Organization. The legal business name is the name specified on the IRS CP-575 Form.

Action: Enter the correspondence information for the User Group in the *Company Telephone, Country, Address 1, City, State/Territory, and Zip Code* fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will change to allow the entry of foreign address information such as Province or Postal Code.

Action: Enter the number of people you expect to register in IACS for the User Group in the **Expected Group Size** field.

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

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. The top part of the screen will be shown with warning messages informing you of data that needs to be corrected or required fields that still need to be filled in.

For instructions on how to complete your registration, go to Section 3.2.4.

G 3.2.3 User Group Administrator – Associate to an Existing User Group

If you select **Associate to an Existing User Group**, the screen will refresh and display an **Organization Search** input area as illustrated in Figure G 33.

Each User Group must be associated with an Organization. To associate to an existing User Group, you must first select the Organization to which the existing User Group is associated. This is a simple two step process.

1. Search IACS to find the Organization.
2. Select the Organization.

Access Request

Community Type: **Provider/Supplier**

Role: User Group Administrator

Action: Create a Provider User Group Create a Surrogate User Group Associate to an Existing User Group

Organization Search

Search for the Organization you want to find the User Group in. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: United States *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search' You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Justification for Action:

* indicates a required field

OMB: 0938-0989 Effective date

Figure G 33: User Group Administrator – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **New User Registration** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

You must provide, at a minimum, all or part of the Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

Action: Select the **Search** button.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 34.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official’s request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

The screenshot shows the 'Access Request' form. Under the 'Organization Details' section, the 'Organization(s)' field is a required dropdown menu with 'wess.org (catonsville, MD)' selected. The 'Justification for Action' field contains the text 'ok'. There are 'Next' and 'Cancel' buttons at the bottom left, and a 'New Search' button next to the organization dropdown. A note at the bottom right states '* indicates a required field'. The footer of the form includes 'OMB: 0938-0989' and 'Effective date 5/06'.

Figure G 34: User Group Administrator – Select Organization

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

If you want to search for a different organization, select the **New Search** button.

When you select the desired Organization, the screen will refresh and display a User Groups field containing a drop-down list of User Groups associated with the selected Organization as illustrated in Figure G 35.

Access Request

Community Type: [Provider/Supplier](#)

i Role: * User Group Administrator

i Action: * Create a Provider User Group Create a Surrogate User Group Associate to an Existing User Group

Organization Details

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): * [Click 'New Search' to search for a new Organization](#)

i User Group(s): *

Justification for Action:

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure G 35: User Group Administrator – User Group Selection

Action: Select the desired *User Group* from the drop-down list in the *User Group* field.

When you have finished selecting the desired Organization and User Group, you must enter a justification statement indicating the reason you are requesting this action.

The screenshot shows a web form titled "Access Request". At the top, it displays "Community Type: Provider/Supplier" and "Role: User Group Administrator". Below this, there are three radio button options for "Action": "Create a Provider User Group", "Create a Surrogate User Group", and "Associate to an Existing User Group". The "Associate to an Existing User Group" option is selected. Under the "Organization Details" section, there are two dropdown menus: "Organization(s)" with the value "wess org (catonsville, MD)" and "User Group(s)" with the value "Surrogate - Dr.J Inc. (Washington, KS)". A text area labeled "Justification for Action:" contains the text "Require association with the selected user group for work." Below the text area are "Next" and "Cancel" buttons. At the bottom left, there is a box with "OMB: 0938-0989" and at the bottom right, a box with "Effective date 5/06". A small note on the right side of the form states "* indicates a required field".

Figure G 36: User Group Administrator – Justification for Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

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. The top part of the screen will be shown with warning messages informing you of data that needs to be corrected or required fields that still need to be filled in.

For instructions on how to complete your registration, go to Section 3.2.4.

G 3.2.4 User Group Administrator– 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 that you have entered in the **New User Registration** screen.

An example of this screen, the **Review Registration Details** screen, is illustrated in Figure G 37.

Note: Figure G 37 is only an example of the **Review Registration Details** screen. The information on this screen will vary depending on your community and role.

Review Registration Details

The following is the information you entered on the New User Registration Form.
 Please review the information below to verify correctness.
 - To modify any of the information, click 'Edit'.
 - If the information is correct and you wish to proceed, click 'Submit'.

First Name:	ypxldf	MI:	w	Last Name:	Mikhaylenko
Social Security Number:	*****0005				
Date of Birth:	07/06/2008				
E-mail:	bhsnor@zvszoa.com				
Office Telephone:	857-100-0000 X858				
Company Name:		fhpqxe		Company Telephone:	
Country:		United States		857-100-0000 X858	
Address 1:	drykqn	Address 2:	icwgpv		
City:	gwmrxw	State/Territory:	AZ	Zip Code:	86525-8652
User/Community Type:	Provider/Supplier				
Role:	User Group Administrator				
Action:	Create Surrogate User Group				
Organization:	wess.org (catonsville, MD)				
User Group Type:	Surrogate User Group				
TIN / SSN:	86-8624472				
CMS Certification Number:	dvqold				
Legal Business Name:	dvqold				
Company Telephone:	862-863-8631 X86393	Company Fax:	864-863-8636 X8637		
Country:	United States				
Address 1:	lfctpe	Address 2:	jdphpb		
City:	khfhna	State/Territory:	AZ	Zip Code:	87070
Expected Group Size:	87				

Figure G 37: Review Registration Details Screen

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 G 38.

- Select the **Edit** button if there is registration 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.
- If you select the **Cancel** button, the 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.

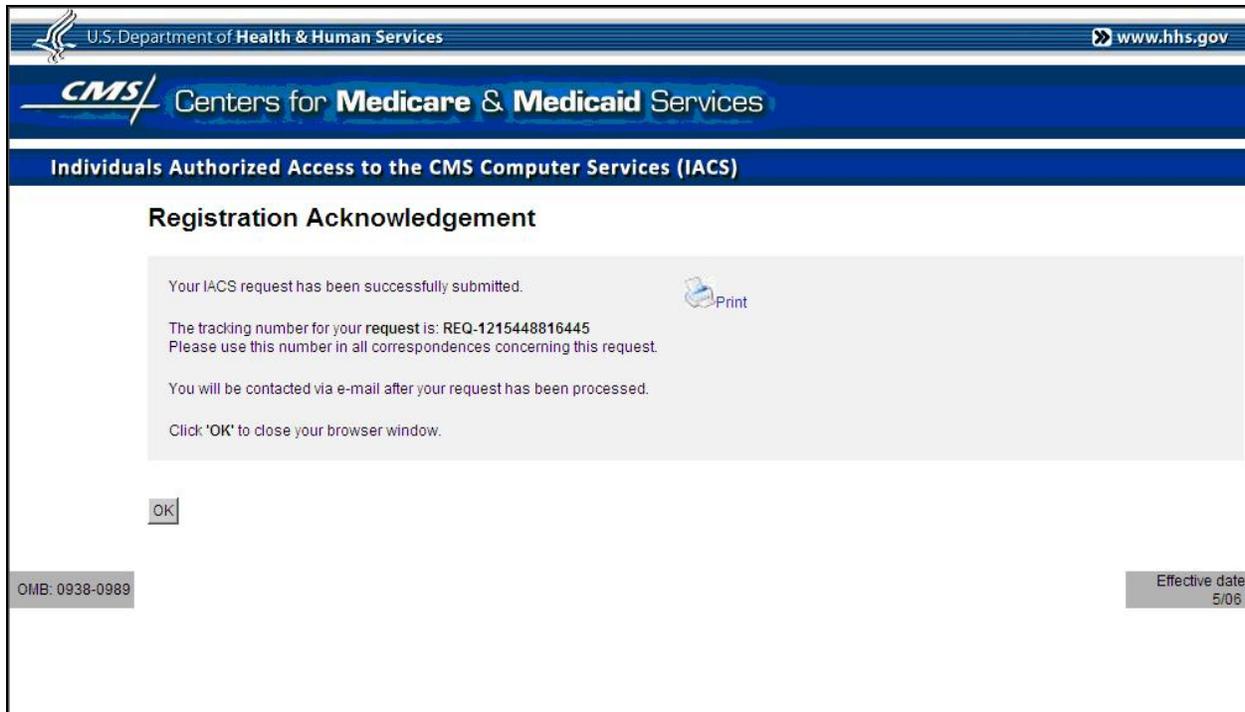


Figure G 38: Registration Acknowledgement Screen

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.

G 3.2.5 User Group Administrator – 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. Figure G 23 presents an example of the email providing your Request Number. You should use that request number if you need to contact your Help Desk regarding your request.

If you are registering in the Provider/Supplier community and 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@cgi.com.

Please have your request number from the Registration Acknowledgement screen available when calling your Help Desk. If you email your Help Desk, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

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

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

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 39: Request Number Email

Your Approver will be notified of your pending request via email. Once your request has been approved and 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 G 40.
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 G 41.

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.

Figure G 40: User ID Email

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

The tracking number for your request is REQ-*<your tracking number will appear here>*. Your temporary one-time password is the first two letters of your last name (1st letter upper case, 2nd – lower case) and the last 6 digits of your Social Security Number. Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>
Read the Privacy Statement and click Enter.
Select the **Account Management** link on the top, and then the **My Profile** link.
Log into IACS using your User ID and password to change your password.

Unauthorized access to this United States Government Computer System and software is prohibited by Title 18 United States Code, Chapter 47 Section 1030, fraud and related activity in connection with computers.
Knowingly accessing a Federal information system inappropriately is a punishable offense subject to fines and up to 20 years imprisonment.

Do not disclose or lend you IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions.

Please review the Department of Health and Human Services Rules of Behavior regarding DHHS/CMS Policies at <http://www.hhs.gov/ocio/policy/2008-0001.003s.html>

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 41: Temporary One-time Password Email

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.

G 3.3 Backup Security Official

In the **Access Request** portion of the **New User Registration** screen the Community Type, **Provider/Supplier** or **FI/Carrier/MAC**, and the Role that you selected, **Backup Security Official** are displayed as illustrated in Figure G 42. The *Organization Search* input fields will also display because to be a Backup Security Official you must associate with a specific Organization.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The names of input fields listed will vary slightly for the FI/Carrier/MAC community users.

Access Request

Community Type: **Provider/Supplier**

Role: Backup Security Official

Organization Search

Search for the Organization you want to associate with. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Justification for Action:

* indicates a required field

OMB: 0938-0989 Effective date 5/06

Figure G 42: Backup Security Official – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **New User Registration** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

You must provide, at a minimum, all or part of the Business Name of the Organization and the Country and State/Territory in the Organization's address. Providing optional information such as the Organization's Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization's address.

Action: Select the **Search** button.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 43.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official’s request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

The screenshot shows a web form titled "Access Request". Under the "Organization Details" section, there is a dropdown menu for "Organization(s)" with the text "Select an Organization" and a red asterisk. Below the dropdown, "wess.org (catonsville, MD)" is visible. To the right of the dropdown is a "New Search" button and a link that says "Click 'New Search' to search for a new Organization". Below the dropdown is a text area for "Justification for Action:" with a red asterisk. At the bottom left are "Next" and "Cancel" buttons. At the bottom right, there is a note: "* indicates a required field". In the bottom left corner of the form area, it says "OMB: 0938-0989". In the bottom right corner, it says "Effective date 5/06".

Figure G 43: Backup Security Official – Select Organization

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

If you want to search for a different organization, select the **New Search** button.

When you have finished selecting the desired Organization you must enter a justification statement indicating the reason you are requesting this action.

The screenshot shows a web form titled "Access Request". At the top, it displays "Community Type: Provider/Supplier" and "Role: Backup Security Official". Below this is the "Organization Details" section, which prompts the user to "Select the Organization you want to associate with, from the list below." The "Organization(s)" field contains "wess org (catonsville, MD)" with an asterisk indicating it is a required field. There is a "New Search" button and a link that says "Click 'New Search' to search for a new Organization". The "Justification for Action" field contains the text "Require access to this organization for work." with an asterisk. At the bottom left are "Next" and "Cancel" buttons. At the bottom right, there is a box for "Effective date" with the value "5/06". In the bottom left corner of the form area, it says "OMB: 0938-0989". A note on the right side states "* indicates a required field".

Figure G 44: Backup Security Official – Justification for Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

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. The top part of the screen will be shown with warning messages informing you of data that needs to be corrected or required fields that still need to be filled in.

G 3.3.1 Backup Security Official – 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 that you have entered in the **New User Registration** screen.

An example of this screen, the **Review Registration Details** screen, is illustrated in Figure G 45.

Note: Figure G 45 is only an example of the **Review Registration Details** screen. The information on this screen will vary depending on your community and role.

Individuals Authorized Access to the CMS Computer Services (IACS)

Review Registration Details

The following is the information you entered on the New User Registration Form.
Please review the information below to verify correctness.
- To modify any of the information, click 'Edit'.
- If the information is correct and you wish to proceed, click 'Submit'.

First Name:	trent	MI:		Last Name:	lott
Social Security Number:	*****3498				
Date of Birth:	01/01/1980				
E-mail:	tlott@wess.com				
Office Telephone:	222-989-7171				
Company Name:	wess co			Company Telephone:	
Country:	United States				
Address 1:	212 west dr			Address 2:	
City:	bethesda	State/Territory:	MD	Zip Code:	21246
User/Community Type:	Provider/Supplier				
Role:	Backup Security Official				
Action:	Associate to Organization				
Organization:	wess org (catonsville, MD)				

Submit Edit Cancel

OMB: 0938-0989 Effective date 5/08

Figure G 45: Backup Security Official – Review Registration Details Screen

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 G 46.

- Select the **Edit** button if there is registration 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.
- If you select the **Cancel** button, the 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 G 46: 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.

G 3.3.2 Backup Security Official – 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. Figure G 47 presents an example of the email providing your Request Number. You should use that request number if you need to contact your Help Desk regarding your request.

If you are registering in the Provider/Supplier community and 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 EUSupport@cgi.com.

Please have your request number from the Registration Acknowledgement screen available when calling your Help Desk. If you email your Help Desk, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

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

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

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 47: Request Number Email

Your Approver will be notified of your pending request via email. Once your request has been approved and 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 G 48.
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 G 49.

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.

Figure G 48: User ID Email

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

The tracking number for your request is REQ-*<your tracking number will appear here>*. Your temporary one-time password is the first two letters of your last name (1st letter upper case, 2nd – lower case) and the last 6 digits of your Social Security Number. Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>

Read the Privacy Statement and click Enter.

Select the **Account Management** link on the top, and then the **My Profile** link.

Log into IACS using your User ID and password to change your password.

Unauthorized access to this United States Government Computer System and software is prohibited by Title 18 United States Code, Chapter 47 Section 1030, fraud and related activity in connection with computers.

Knowingly accessing a Federal information system inappropriately is a punishable offense subject to fines and up to 20 years imprisonment.

Do not disclose or lend you IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions.

Please review the Department of Health and Human Services Rules of Behavior regarding DHHS/CMS Policies at <http://www.hhs.gov/ocio/policy/2008-0001.003s.html>

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 49: Temporary One-time Password Email

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.

G 3.4 Security Official

In the **Access Request** portion of the **New User Registration** screen the Community Type, **Provider/Supplier**, and the Role that you selected, **Security Official** are displayed as illustrated in Figure G 50. The Organization Information input fields will also display because to be a Security Official you must register your Organization in IACS.

Note: The Provider/Supplier Community will be used as an example throughout this User Guide Attachment. The names of input fields listed will vary slightly for the FI/Carrier/MAC community users.

Access Request

Community Type: **Provider/Supplier**

Role: Security Official

Organization Information

TIN / SSN: * CMS Certification Number:

Legal Business Name: * The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Please select if the Organization's Address and Telephone Number Information is same as the User's Address and Telephone Number

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: * Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: United States *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Organization Size: *

Justification for Action:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Figure G 50: Security Official – Organization Information

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define your Organization.

Action: Enter the **Taxpayer Identification Number**, TIN or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the Organization in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Note: The **CMS Certification Number** was previously known as the OSCAR Number and pertains to Medicare Part A Institutional Providers. Enter this number if the Organization has one.

Note: Provide any required information for the FI/Carrier/MAC community that is requested by IACS. One example of this additional information would be the Medicare Contractor ID number.

Action: Enter the **Legal Business Name** of the Organization. The legal business name is the name specified on the IRS CP-575 Form.

If the Organization's address and telephone number are not the same as your professional address, take the following action.

Action: Enter the **correspondence information** for the Organization in the **Company Telephone, Country, Address 1, City, State/Territory, and Zip Code** fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will change to allow the entry of foreign address information such as Province or Postal Code.

Note: The valid input format of the telephone number, fax number, phone extensions, and Postal Code will vary depending on the foreign country selected.

After the *Legal Business Name* field there is a check box with the following message next to it: *Please select if the Organization's Address and Telephone Number Information is the same as the User's Address and Telephone Number.*

Note: Select the **Check Box** if the address and telephone number of the Organization you are creating is the same as your professional address and telephone number. The system will automatically populate your address and telephone number information in the appropriate *Organization Information* fields.

Action: Select the **Expected Organization Size** from the drop-down list in the *Expected Organization Size* field. This field refers to the number of expected users to register in IACS for the Organization.

Note: For the *Expected Organization Size* field, you have two options provided in a drop-down selection box. If you select the information icon a message will display. This icon is displayed as a graphic: a small blue letter *i* inside a white box. The options and messages are as follows:

- 1.) If you select the option: **1-9 users** and select the information icon a message will display that reads as follows:
 - *This will be considered as a **Small Organization**. Small Organizations must have a Security Official. If End Users will register in the Organization, then at least one User Administrator must create a User Group for End Users to register. User Group Administrators and End Users may also request application access.*

- 2.) If you select the option: **10 & above users** and select the information icon a message will display that reads as follows:
 - *This will be considered a Mid-sized to Large-sized Organization. Your Organization must follow a hierarchy of one Security Official, User Group Administrators), and End Users. The Organization may also have one or more Backup Security Officials. User Group Administrators and End Users may also request application access.*

When you have completed providing the required *Organization Information* you must enter a justification statement indicating the reason you are requesting this action as illustrated in Figure G 51.

Figure G 51: Security Official – Justification for Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

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. The top part of the screen will be shown with warning messages informing you of data that needs to be corrected or required fields that still need to be filled in.

G 3.4.1 Security Official – 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 that you have entered in the **New User Registration** screen.

An example of this screen, the **Review Registration Details** screen, is illustrated in Figure G 52.

Note: Figure G 52 is only an example of the **Review Registration Details** screen. The information on this screen will vary depending on your community and role.

The following is the information you entered on the New User Registration Form. Please review the information below to verify correctness.

- To modify any of the information, click **Edit**.
- If the information is correct and you wish to proceed, click **Submit**.

First Name:	Mary	MI:		Last Name:	Hopkins
Social Security Number:	*****9999				
Date of Birth:	10/01/1965				
E-mail:	mhopkins@howell.com				
Office Telephone:	410-594-1111				
Company Name:	Howell Medical Hospital			Company Telephone:	
Country:	United States			Address 2:	
Address 1:	102 Hughes Ave.			Zip Code:	21224
City:	Baltimore	State/Territory:	MD		
User/Community Type:	Provider/Supplier				
Role:	Security Official				
Action:	Create Organization				
Organization Type:	Provider Organization				
TIN/SSN:	22-5699999	CMS Certification Number:			
Legal Business Name:	Howell Medical Hospital			Company Fax:	
Company Telephone:	410-594-1110			Address 2:	
Country:	United States			Zip Code:	21206
Address 1:	112 Howell Blvd.				
City:	Baltimore	State/Territory:	MD		
Expected Organization Size:	10 & above users				

Submit Edit Cancel

Figure G 52: Security Official – Review Registration Details Screen

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 G 53.

- Select the **Edit** button if there is registration 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.

- If you select the **Cancel** button, the 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.

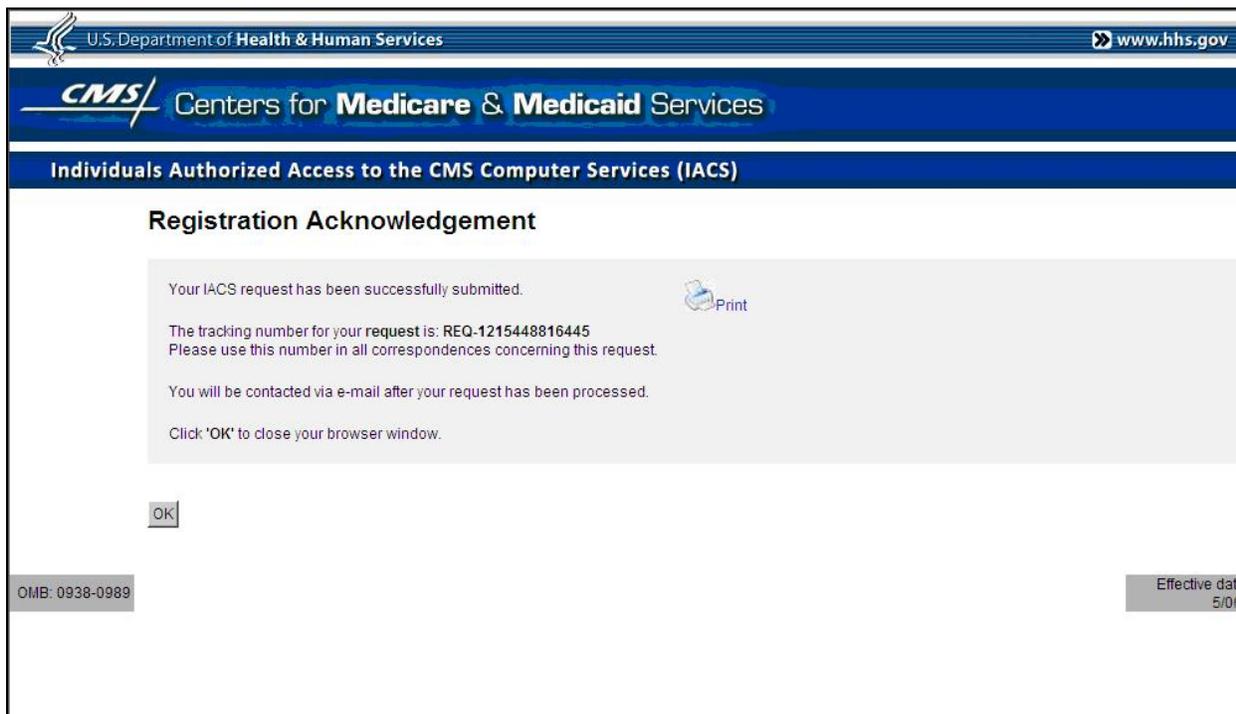


Figure G 53: Registration Acknowledgement Screen

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.

G 3.4.2 Security Official – 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. Figure G

54 presents an example of the email providing your Request Number. You should use that request number if you need to contact your Help Desk regarding your request.

If you are registering in the Provider/Supplier community and 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 EUSupport@cgi.com.

Please have your request number from the Registration Acknowledgement screen available when calling your Help Desk. If you email your Help Desk, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

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

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

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 54: Request Number Email

Note: In the Provider/Supplier community, in addition to the registration acknowledgement email, you will receive a separate email request asking you to mail a hard copy of your Organization's **Internal Revenue Service, IRS, CP-575 Form** or other documentation to CMS' External User Services, EUS, in order to complete the registration of your Organization in IACS.

This email contains EUS' contact information and mailing address. An example of the **CP-575 Form – Request Email** is shown in Figure G 55. The text of this email may vary slightly from the example shown.

Recipient: User requesting Security Official role
Subject: Information Needed for Processing IACS Request Number <Request Number of IACS Request>

This e-mail is in reference to your submitted IACS request with the following Request Number: <Request Number of IACS Request>

In order to process your submitted IACS request, a copy of your organization's CP-575 form from the Internal Revenue Services (IRS) is required. This form is available from the IRS and is the letter received granting a Taxpayer Identification Number.

Mail a copy of the IRS CP-575 to CMS' External User Services (EUS) who will be facilitating the registration process. EUS can be contacted at the following address and telephone number:

External User Services
PO Box 792750
San Antonio, Texas 78216
Phone: 1-866-484-8049
E-mail: EUSsupport@cgi.com

Thank you,

External User Services (EUS)

Figure G 55: CP-575 Form – Request Email

Your approver will also be notified of your pending IACS registration request via email.

Once your request has been approved and 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 G 56.
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 G 57.

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.

Figure G 56: User ID Email

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

The tracking number for your request is REQ-*<your tracking number will appear here>*. Your temporary one-time password is the first two letters of your last name (1st letter upper case, 2nd – lower case) and the last 6 digits of your Social Security Number. Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>
Read the Privacy Statement and click Enter.
Select the **Account Management** link on the top, and then the **My Profile** link.
Log into IACS using your User ID and password to change your password.

Unauthorized access to this United States Government Computer System and software is prohibited by Title 18 United States Code, Chapter 47 Section 1030, fraud and related activity in connection with computers.

Knowingly accessing a Federal information system inappropriately is a punishable offense subject to fines and up to 20 years imprisonment.

Do not disclose or lend you IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions.

Please review the Department of Health and Human Services Rules of Behavior regarding DHHS/CMS Policies at <http://www.hhs.gov/ocio/policy/2008-0001.003s.html>

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 57: Temporary One-time Password Email

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.

G 3.5 Registry End User

In the **Access Request** portion of the **New User Registration** screen the Community Type **Provider/Supplier** and the Role that you selected, **Registry End User** are displayed as illustrated in Figure G 58.

Note: The Registry End User role is available only to users of the Provider/Supplier Community.

Professional Contact Information

Office Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: * Company Telephone: Ext:

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

EDC Assigned User ID:

Access Request

Community Type: [Provider/Supplier](#)

Role: Registry End User

Organization: Registry Organization - PQRI

User Group(s): *

Greg1
Registry User Group 2 - PQRI
Registry User Group 3 - PQRI
Registry User Group 4 - PQRI
Registry User Group 5 - PQRI
Registry User Group 6 - PQRI
Registry User Group 7 - PQRI
Registry User Group 8 - PQRI

Justification for Action:

* indicates a required field

OMB: 0938-0989 Effective date:

Figure G 58: Registry End User – Access Request Area

Below these fields, additional input fields, specific to your selected community and role are displayed.

When you have finished selecting the desired User Group, you must enter a justification statement indicating the reason you are requesting this action.

Professional Contact Information

Office Telephone: 514-110-0000 * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: Wellness * Company Telephone: 514-110-0000 Ext:

Country: United States *

Address 1: 1 Windy Circle * Address 2: Suite 100

City: Baltimore * State/Territory: MD * Zip Code: 21244 * -

EDC Assigned User ID:

Access Request

Community Type: Provider/Supplier

Role: Registry End User

Organization: Registry Organization - PQRI

User Group(s): Registry User Group 6 - PQRI *

Justification for Action: *

* indicates a required field

Next Cancel

Figure G 59: Registry End User – Justification for Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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 to the **CMS Applications Portal Introduction** screen.

G 3.5.1 Registry End User – Completing Your Registration

If the data entered during the registration process are 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** screen, is illustrated in Figure G 60.

Note: Figure G 60 is only an example of the **Review Registration Details** screen.

Individuals Authorized Access to the CMS Computer Services (IACS)

Review Registration Details

The following is the information you entered on the New User Registration Form.
Please review the information below to verify correctness.
- To modify any of the information, click 'Edit'.
- If the information is correct and you wish to proceed, click 'Submit'.

First Name:	vpdetv	MI:	t	Last Name:	Mikhaylenko
Social Security Number:	*****0000				
Date of Birth:	11/24/2008				
E-mail:	ybjxke@wxicib.com				
Office Telephone:	514-110-0000				
Company Name:	Wellness	Company Telephone:	514-110-0000		
Country:	United States				
Address 1:	1 Windy Circle	Address 2:	Suite 100		
City:	Baltimore	State/Territory:	MD	Zip Code:	21244
User/Community Type:	Provider/Supplier				
Role:	Registry End User				
Organization:	Registry Organization - PQRI (Baltimore, MD)				
User Group:	Registry User Group 6 - PQRI				

Figure G 60: Review Registration Details Screen

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 G 61.

- Select the **Edit** button if there is registration 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.
- If you select the **Cancel** button, the 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 to the **CMS Applications Portal Introduction** screen.

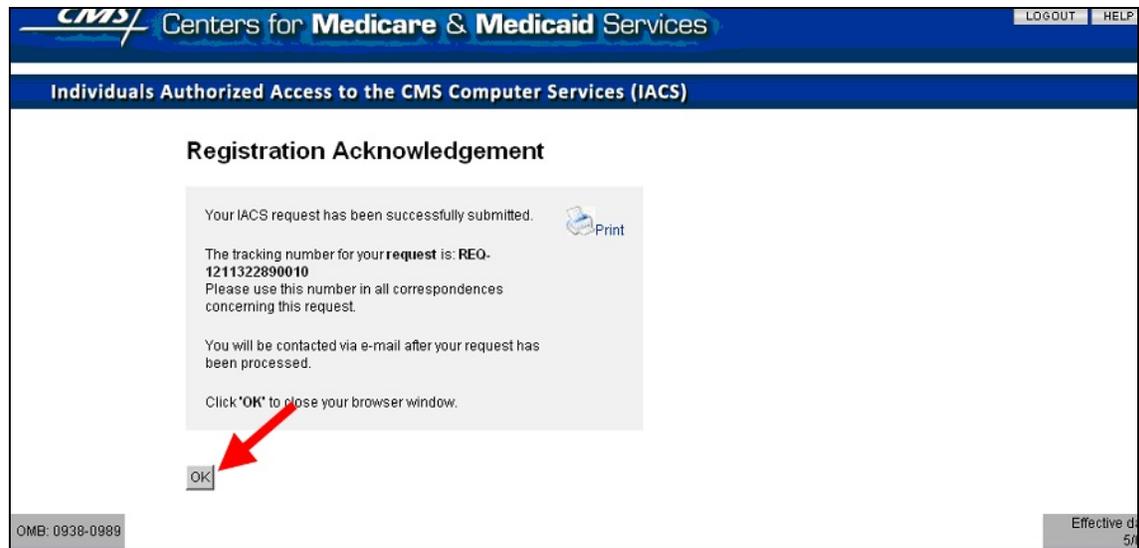


Figure G 61: Registration Acknowledgement Screen

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 to the **Account Management** screen as illustrated in Figure G 3.

G 3.5.2 Registry End User – 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. Figure G 62 presents an example of the email providing your Request Number. You should use this request number if you need to contact your Help Desk regarding your request.

If you are registering in the Provider/Supplier community and 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@cgi.com.

Please have your request number from the Registration Acknowledgement screen available when calling your Help Desk. If you email your Help Desk, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

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

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

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 62: Request Number Email

Your Approver will be notified of your pending request via email. Once your request has been approved and your account has been created, two separate email messages will automatically be sent to you.

3. The first (**Subject: FYI: User Creation Completed – Account ID Enclosed**) will contain your IACS User ID. This email is illustrated in Figure G 63.
4. 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 G 64.

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.

Figure G 63: User ID Email

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

The tracking number for your request is REQ-*<your tracking number will appear here>*. Your temporary one-time password is the first two letters of your last name (1st letter upper case, 2nd – lower case) and the last 6 digits of your Social Security Number. Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>

Read the Privacy Statement and click Enter.

Select the **Account Management** link on the top, and then the **My Profile** link.

Log into IACS using your User ID and password to change your password.

Unauthorized access to this United States Government Computer System and software is prohibited by Title 18 United States Code, Chapter 47 Section 1030, fraud and related activity in connection with computers.

Knowingly accessing a Federal information system inappropriately is a punishable offense subject to fines and up to 20 years imprisonment.

Do not disclose or lend you IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions.

Please review the Department of Health and Human Services Rules of Behavior regarding DHHS/CMS Policies at <http://www.hhs.gov/ocio/policy/2008-0001.003s.html>

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 64: Temporary One-time Password Email

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.

G 4.0 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 G 1 for an illustration of this screen.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure G 65.

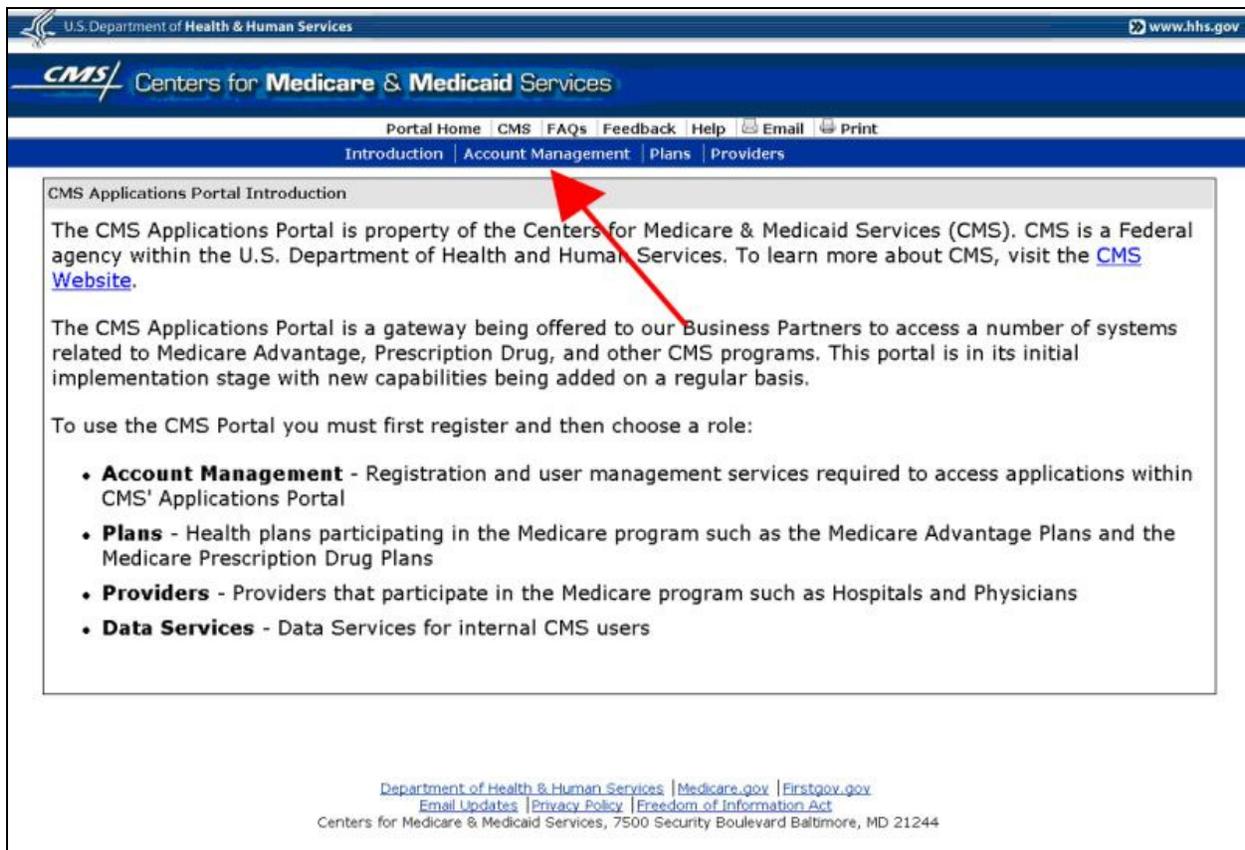


Figure G 65: CMS Applications Portal Introduction Screen

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

The screen will refresh and display the **Account Management** screen as illustrated in Figure G 66.

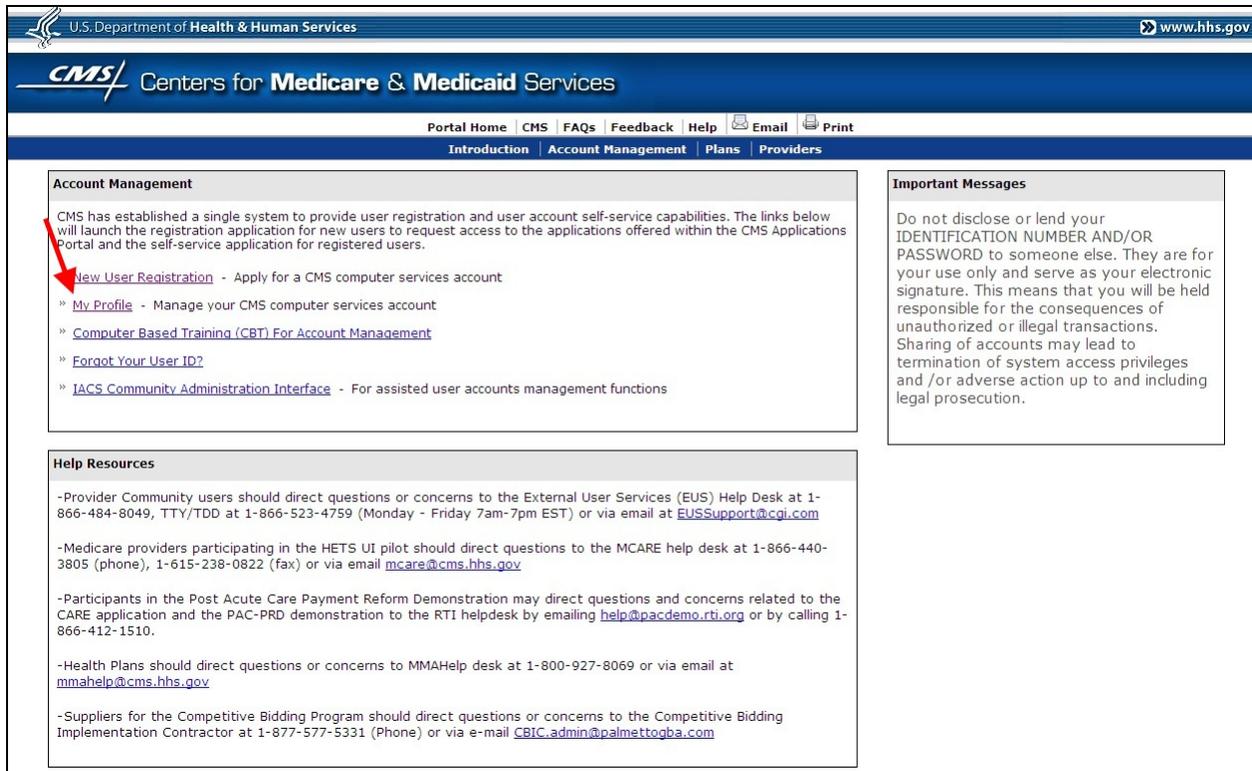


Figure G 66: Account Management Screen

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

The **Login to IACS** screen will display as illustrated in Figure G 67.

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

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

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

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

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

User ID

Password

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

Figure G 67: Login to IACS Screen

Action: Enter your new *User ID*.

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

Action: Select the *Login* button.

G 4.1 Change Password

The **Change Password** screen illustrated in Figure G 68 will display.

This screen will also display when you login after a password reset if you forget your password.

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

Change Password

• Your password has expired for account AAAAnnn on resource Lighthouse (Lighthouse). Please change it now.

New Password

Confirm New Password

CMS Password Policy

- The password must be changed at least every 60 days.
- The password must be 8 characters long.
- The password must contain at least 2 letters and 1 number.
- Letters must be mixed case (i.e., your password must have at least 1 upper case letter and 1 lower case letter).
- The password must not contain your user UID.
- The password must not contain 4 consecutive characters from any of your previous 6 passwords.
- The password must be different from your previous 6 passwords.

Figure G 68: Change Password Screen

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

Action: Re-enter your **New Password** 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 G 70.

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:

- You must change your password at least every 60 days
- 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 G 69, 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.

CMS Centers for **Medicare & Medicaid Services** LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

Change Password

To change your password, enter and confirm a new password in the fields below, and then click **Change Password**.

⊛ 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.

New Password

Confirm New Password

CMS Password Policy

- The password must be changed at least every 60 days.
- The password must be 8 characters long.
- The password must contain at least 2 letters and 1 number.
- Letters must be mixed case (i.e., your password must have at least 1 upper case letter and 1 lower case letter).
- The password must not contain your user UID.
- The password must not contain 4 consecutive characters from any of your previous 6 passwords.
- The password must be different from your previous 6 passwords.

Logout Logged in as: CSRL111

Figure G 69: Change Password Policy Violation Message Screen

Action: Enter a **New Password** in the *New Password* and *Confirm New Password* fields, and again.

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

G 4.2 Change Answers to Authentication Questions

After you have successfully changed your password, the **My Profile** screen will redisplay as illustrated in Figure G 70.

The screen will have only one option displaying, the **Change Answers to Authentication Questions** hyperlink. You must select this link and answer at least two authentication questions. Your answers will be used in the future to validate your identity should you forget your password or your User ID.

You may answer more than two authentication questions, but you must answer a minimum of two. IACS will not give you access to the system if you cannot answer correctly at least two of your authentication questions when asked.

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

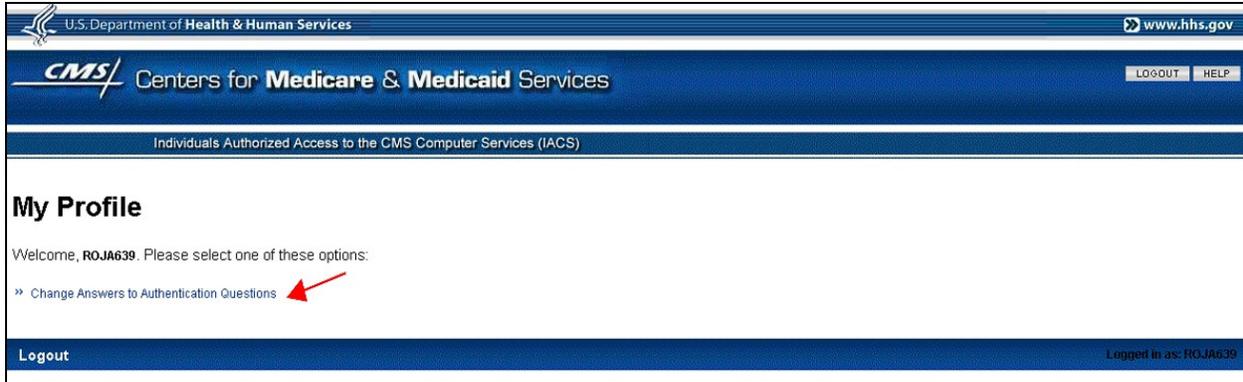


Figure G 70: My Profile – Change Answers to Authentication Questions Screen

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 G 71.

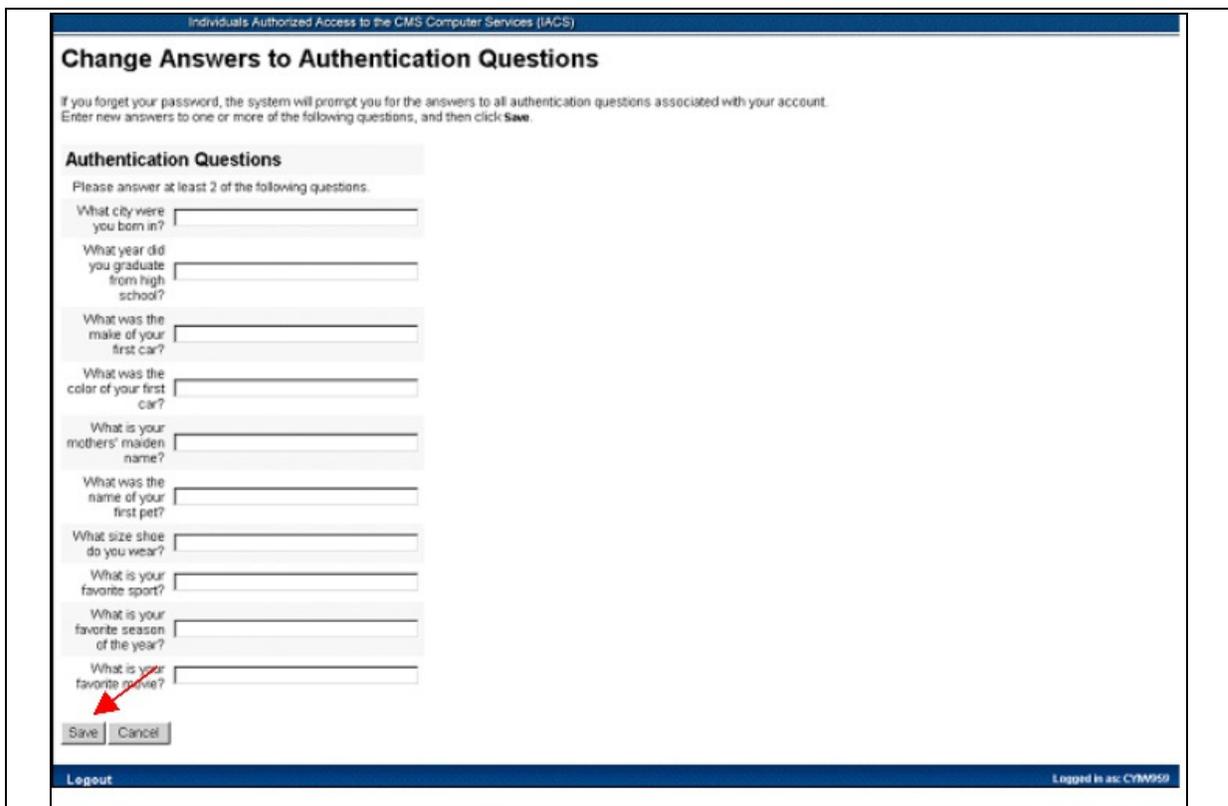


Figure G 71: Change Answers to Authentication Questions Screen

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 G 70.

The **Change Answers Results** screen will display listing the Authentication Questions you have answered as illustrated in Figure G 72. The answers to the Authentication Questions will be displayed to secure the information.

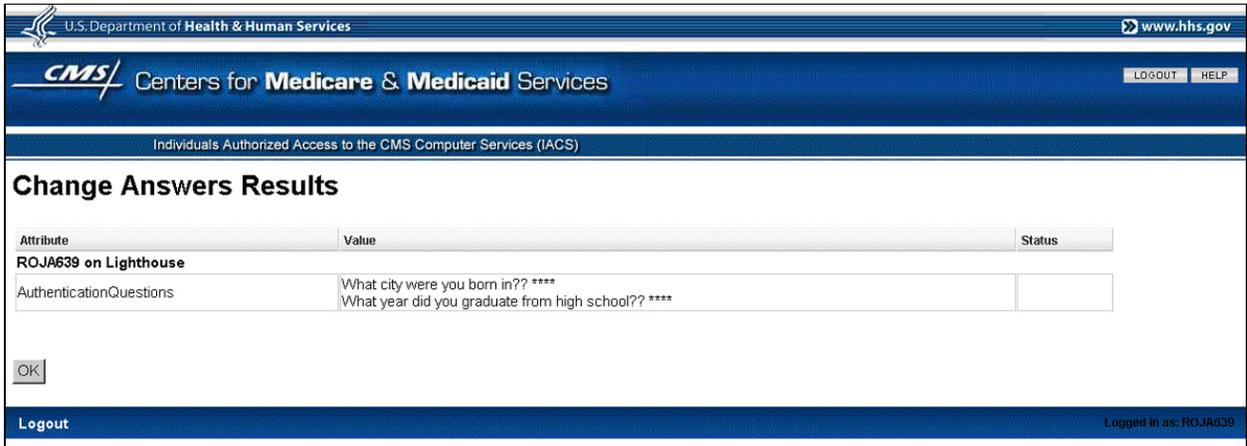


Figure G 72: Change Answers Results Screen

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 G 73.



Figure G 73: My Profile Screen

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.

G 5.0 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 G 6.0 of this User Guide Attachment.

G 5.1 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 G 74.

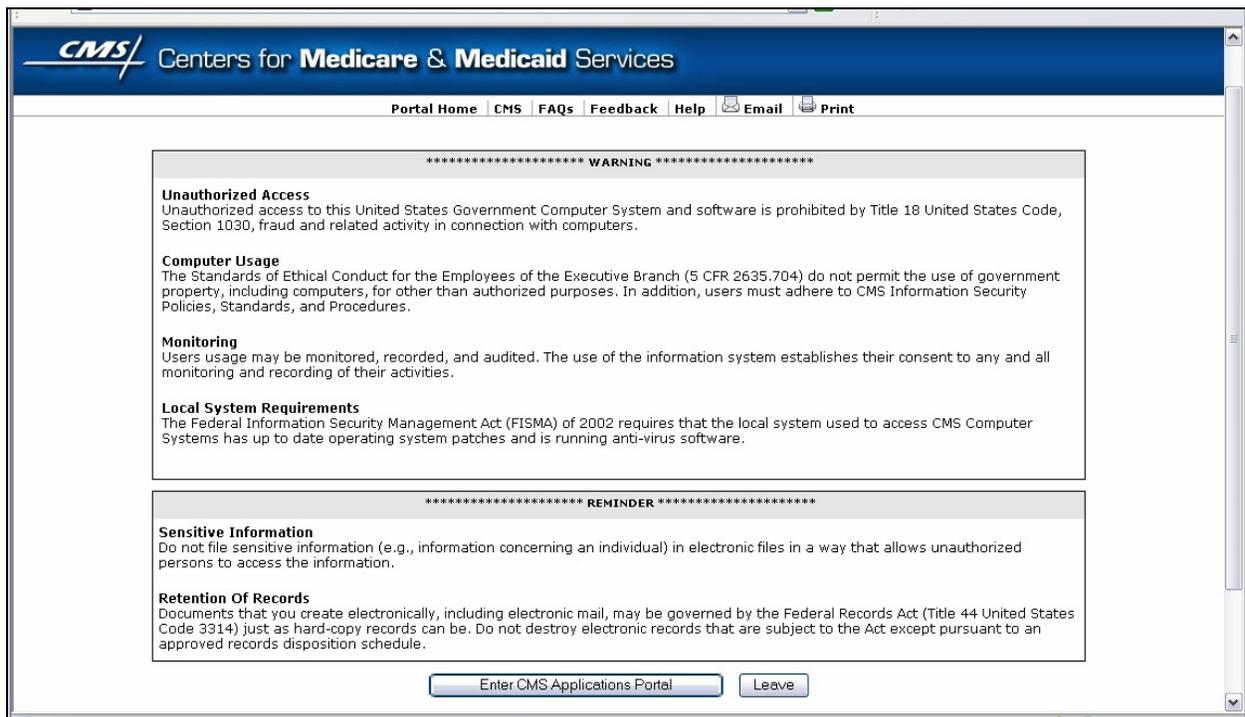


Figure G 74: CMS Applications Portal WARNING/REMINDER Screen

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

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

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure G 75.

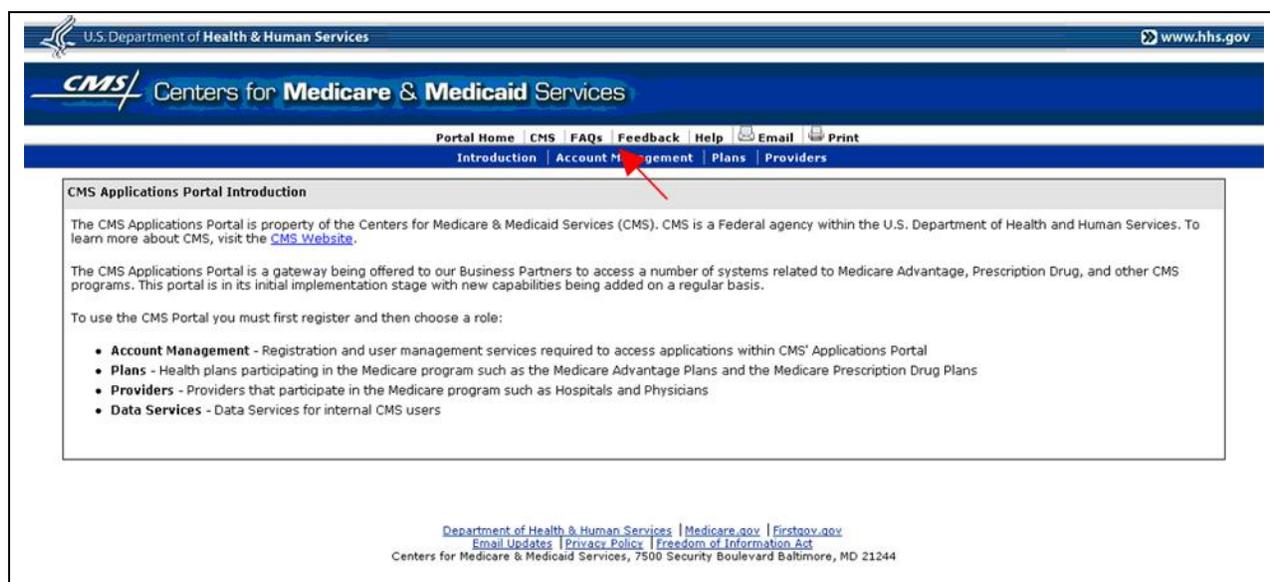


Figure G 75: CMS Applications Portal Introduction Screen

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

The **Account Management** screen will display as illustrated in Figure G 76.

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

CMS Centers for **Medicare & Medicaid** Services

Portal Home | CMS | FAQs | Feedback | Help | Email | Print

Introduction | Account Management | Plans | Providers

Account Management

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

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

Important Messages

Do not disclose or lend your IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions. Sharing of accounts may lead to termination of system access privileges and /or adverse action up to and including legal prosecution.

Help Resources

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

Figure G 76: Account Management Screen

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 G 77.

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

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

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

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

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

User ID

Password

Figure G 77: Login to IACS Screen

Action: Enter your *User ID*

Action: Enter your *Password*.

Action: Select the *Login button*.

The **My Profile** screen will display as illustrated in Figure G 78. 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 G 5.2 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 the Modify Account Profile Section 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.

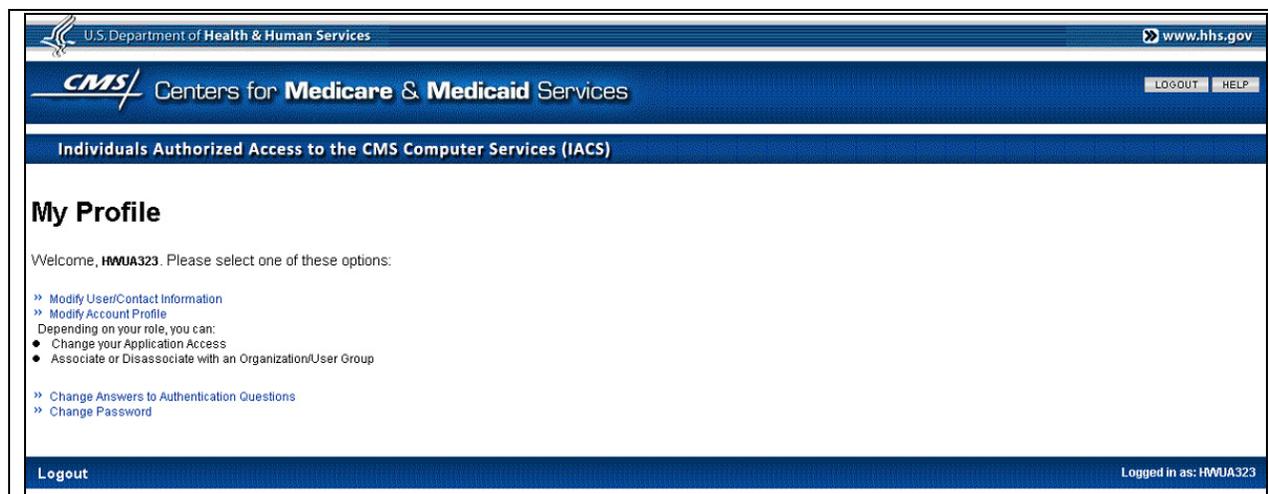


Figure G 78: My Profile Screen

Action: Select the **Modify User/Contact Information** hyperlink and continue to Section G 5.2 below.

G 5.2 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 G 79. The **User Information** fields are filled in with the information stored in IACS. The SSN field and your social security number are not displayed.

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

CMS Centers for **Medicare & Medicaid** Services LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

Modify User/Contact Information

User Information

User ID: HWUA323

First Name: Michael * MI: M Last Name: Mikhaylenko *

Date of Birth: 03/11/1968 * Valid Date of Birth format is mm/dd/yyyy

Email Address: MMMike@network.net *
Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

Professional Contact Information

Office Telephone: 828-100-1828 * Ext: 828 Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: Michael Associates Company Telephone: 828-100-1828 Ext: 828

Country: United States *

Address 1: 1932 N. Wilson * Address 2: *

City: Paint * State/Territory: MD * Zip Code: 82892 * - *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: HWUA323

Figure G 79: Modify User/Contact Information Screen

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 G 80.

U.S. Department of Health & Human Services

CMS Centers for **Medicare & Medicaid** Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Modify Request Confirmation

You made changes to your profile.

To submit your request please click **Submit** button.
If you want to edit your changes please click **Edit** Button.
If you want to cancel the changes, which you made please click **Cancel** button

OMB: 0938-0989

[Logout](#)

Figure G 80: Modify Request Confirmation Screen

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

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

- 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 G 81.

The screenshot shows the 'Modification Request Acknowledgement' screen within the CMS system. The header includes the U.S. Department of Health & Human Services logo and the URL www.hhs.gov. Below this is the CMS logo and the text 'Centers for Medicare & Medicaid Services', with 'LOGOUT' and 'HELP' buttons. The main heading is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The title of the screen is 'Modification Request Acknowledgement'. The main content area contains the following text: 'Thank you for your request to modify registration. The tracking number for your request is: REQ-1214411452843'. To the right of this text is a 'Print' icon. Below this, it says: 'Please use this number in all correspondences concerning this request. You will be notified via e-mail once your request has been processed.' Further down, it states: 'Contact your Help Desk if you need further assistance. Your Help Desk contact information is listed in the "Help Resources" portion of the Account Management page in the CMS Applications Portal.' At the bottom left of the main content area is an 'OK' button. The footer of the screen displays 'OMB: 0938-0989' on the left, 'Effective date 5/06' on the right, and 'Logout' on the far left of the bottom bar, with 'Logged in as: AVKU632' on the far right of the bottom bar.

Figure G 81: Modification Request Acknowledgement Screen

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

G 6.0 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 G 5.0 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.

G 6.1 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 G 82.

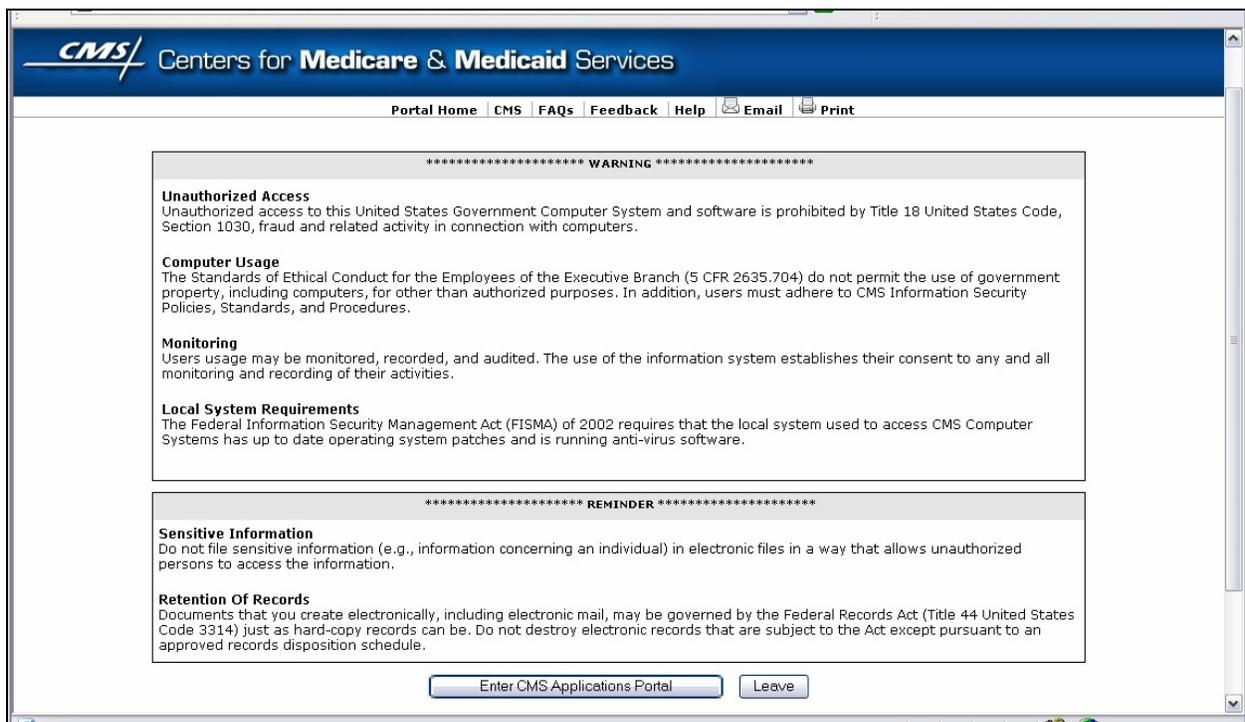


Figure G 82: CMS Applications Portal WARNING/REMINDER Screen

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

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

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure G 83.

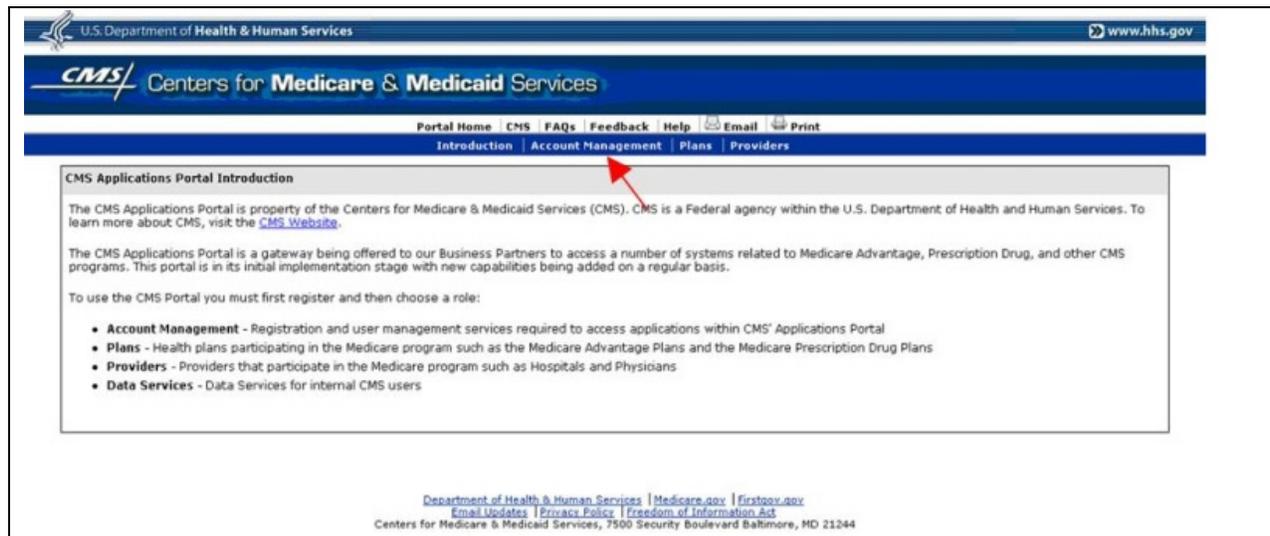


Figure G 83: CMS Applications Portal Introduction Screen

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

The **Account Management** screen will display as illustrated in Figure G 84.

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

CMS Centers for **Medicare & Medicaid** Services

Portal Home | CMS | FAQs | Feedback | Help | Email | Print

Introduction | Account Management | Plans | Providers

Account Management

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

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

Important Messages

Do not disclose or lend your IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions. Sharing of accounts may lead to termination of system access privileges and /or adverse action up to and including legal prosecution.

Help Resources

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

Figure G 84: Account Management Screen

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 G 85.

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

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

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

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

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

User ID

Password

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

Figure G 85: Login to IACS Screen

Action: Enter your *User ID*

Action: Enter your *Password*.

Action: Select the *Login button*.

The **My Profile** screen will display as illustrated in Figure G 86. 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 G 5.0 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 G 6.2, 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.

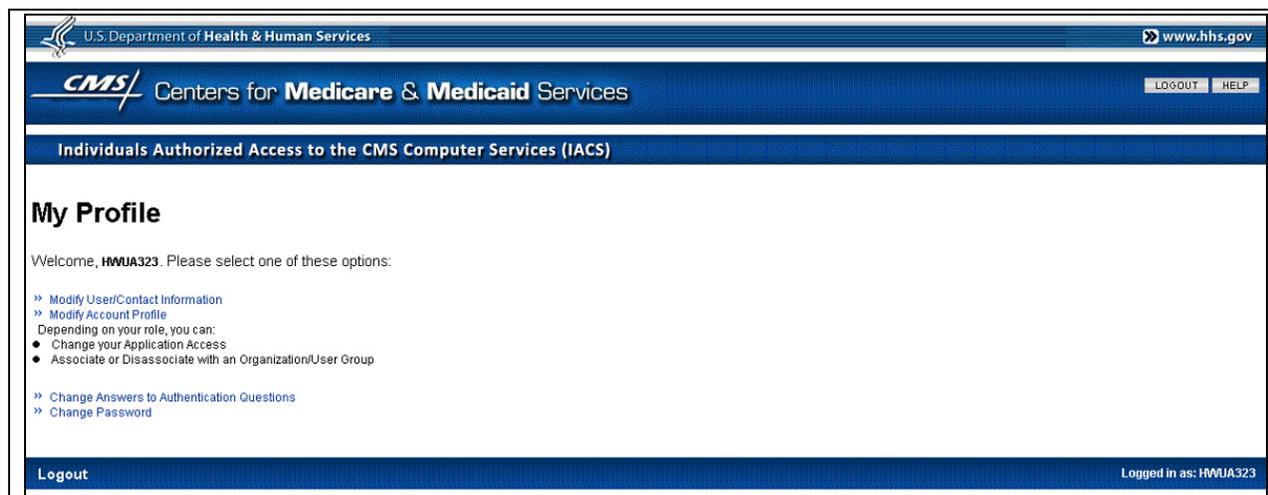


Figure G 86: My Profile Screen

Action: Select the **Modify Account Profile** hyperlink and continue to Section G 6.2 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.

G 6.2 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 G 87.

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 **within your community**. This list will vary in different communities and with different 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.

Modify Account Profile

User Information

User ID:

First Name: * MI: Last Name: *

Date of Birth: * Valid Date of Birth format is mm/dd/yyyy

E-mail: *

Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

Professional Contact Information

Office Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: Company Telephone: Ext:

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Access Request

Select Action: ▼

Community/Application : Role	Profile Summary	Possible Actions
View My Access Profile : Provider/Supplier : Provider user	Organization / User Group (Role): Greg's co / Accounting (End User)	As an End User: <ul style="list-style-type: none"> <input type="radio"/> View User Group Details <input type="radio"/> Request access to applications like CARE/PS&R <input type="radio"/> Dissociate from User Group Additionally, you can: <ul style="list-style-type: none"> <input type="radio"/> Create an Organization profile <input type="radio"/> Associate to an Organization <input type="radio"/> Create a User Group <input type="radio"/> Associate to a User Group

* indicates a required field

OMB: 0938-0989
Effective date 5/08

Figure G 87: Modify Account Profile Screen

In the **Access Request** portion of the screen, the *Select Action* field provides a drop-down list from which you can select the desired action. These are illustrated in the screen in Figure G 88. 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.
- **Modify Provider/Supplier Profile or Modify FI/Carrier/MAC Profile** – Allows you to modify your Provider/Supplier access profile. These modifications all fall *within your User Community*. Select this to perform any of the actions available, such as those listed below:
 - **Request access/Remove access** for applications integrated with IACS and available to your *User Community*.
 - **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.

Note: A similar **Modify FI/Carrier/MAC Profile** action will appear for users in that community. The modification options will be the same.

- **Add Application** – Allows you to request access to a role in a CMS Application integrated with IACS. This modification will be made *outside your User 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 your User Community*. You can only request access to one community role at a time.

Access Request

Select Action: View My Access Profile

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

View My Access Profile: Provider/Supplier: Provider user

Profile Summary	Possible Actions
Organization / User Group (Role): Greg's co / Accounting (End User)	As an End User: <ul style="list-style-type: none"> View User Group Details Request access to applications like CARE/PS&R Disassociate from User Group Additionally, you can: <ul style="list-style-type: none"> Create an Organization profile Associate to an Organization Create a User Group Associate to a User Group

* indicates a required field

Cancel

Figure G 88: Select Action Drop-down List

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.

G 6.3 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 G 89. 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.

Access Request

Select Action: View My Access Profile

Community/Application : Role	Profile Summary	Possible Actions
View My Access Profile : Provider/Supplier : Provider user	Organization / User Group (Role): Howell Medical Hospital / Hospice helpers (PQRI User) Howell Medical Hospital / Hospice helpers (User Group Administrator) Howell Medical Hospital / Obstetrics (User Group Administrator)	As an User Group Administrator: <input type="radio"/> View/Edit User Group Details <input type="radio"/> Request access to applications like CARE/P <input type="radio"/> Disassociate from User Group Additionally, you can: <input type="radio"/> Create an Organization profile <input type="radio"/> Associate to an Organization <input type="radio"/> Create a User Group <input type="radio"/> Associate to a User Group

* indicates a required field

Cancel

Figure G 89: View My Access Profile

Action: Review the information displayed in the table and *select another action* 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 G 90.

Access Request

Application	Request Number	Role	Type of Request
Provider/Supplier	REQ-1217427895667-MODIFY	Security Official	Modify Application/Community

Select Action: View My Access Profile

Community/Application : Role	Profile Summary	Possible Actions
View My Access Profile : Provider/Supplier : Provider user	Organization / User Group (Role): - / - (Individual Practitioner)	As an Individual Practitioner: <input type="radio"/> Request access to PQRI application Additionally, you can: <input type="radio"/> Create an Organization profile <input type="radio"/> Associate to an Organization <input type="radio"/> Create a User Group <input type="radio"/> Associate to a User Group

* indicates a required field

Cancel

Figure G 90: Pending Requests Table

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

G 6.4 Modify Provider/Supplier Profile or Modify FI/Carrier/MAC 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 G 91.

Note: The actions and processes for the option, **Modify FI/Carrier/MAC Profile**, are almost identical to those that follow. In the rare instances that the actions or processes differ, this has been addressed with detailed information in the User Guide Attachment.

The screenshot shows a web form titled "Access Request". At the top, there is a "Select Action:" dropdown menu with "Modify Provider/Supplier Profile" selected. Below this, the "Community Type:" is set to "Provider/Supplier". The "My Current Access Profile:" section contains a table with the following data:

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	[Dropdown]

Below the table is an "Additional Access Request(s):" dropdown menu. A "Justification for Action:" text area is present, marked with a red asterisk. At the bottom left are "Next" and "Cancel" buttons. The footer includes "OMB: 0938-0989", "Effective date 5/06", and "Logged in as: XCSU296".

Figure G 91: My Current Access Profile and Additional Access Requests

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, if the user was approved for a role of User Group Administrator or End User within a User Group
- 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 your roles and any previous modifications you may have made to your IACS account profile.

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

The *Action* field actions that are available are described in more detail with instructions on how to complete each action in the following subsections in this User Guide Attachment. These action options will be role-specific and can include:

- **View User Group Details** – for both User Group Administrators and End Users
 - An *edit* function is available for User Group Administrators only.
- **View Organization Details** – for both Security Officials and Backup Security Officials
 - An *edit* function is available for Security Officials only.

- **Disassociate from an Organization** – for Backup Security Officials

Note: A Security Official must contact the Help Desk to disassociate from an Organization; A Backup Security Official must be approved to assume the role of Security Official prior to disassociating the Security Official from the Organization.

- **Disassociate from a User Group** – for both User Group Administrators and End Users

- **Request Access to an Application** – for applications *within your User Community* for both User Group Administrators and End Users

Note: Access to additional CMS Applications, *outside* the Provider/Supplier User Community can requested using the Add Application selection from the Select Action drop-down list of actions. Please see the Add Application Section in this User Guide Attachment for more details.

- **Remove Access from an Application** – for approved application roles *within your User Community* for both User Group Administrators and End Users

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 and illustrated in Figure G 92. Details on the roles, functions and responsibilities, and instructions on how to complete these actions are available in Section G 6.0 of this User Guide Attachment.

User Group Actions

- **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.
- **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.
- **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.

Individual Practitioner Actions

- **Create an Individual Practitioner Profile** – This action will use your IACS User and Professional Contact Information to create an Individual Practitioner Profile for you. Additional information on Individual Practitioners in IACS can be found in the IACS User Guide Attachment F – Individual Practitioner.

Organization Actions

- **Create a new Organization** – This action will require you to assume the role of Security Official as you create an IACS Organization.
- **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.

The screenshot shows the 'Access Request' form. At the top, 'Select Action' is set to 'Modify Provider/Supplier Profile'. Below, 'Community Type' is 'Provider/Supplier'. A table shows 'My Current Access Profile' with two rows: 'Greg's co' as 'Accounting' 'Community' 'End User' and 'Greg's co' as 'Accounting' 'Application' 'CARE Read Only'. The 'Justification for Action' field is open, showing a list of actions categorized into 'User Group Actions', 'Individual Practitioner Actions', and 'Organization Actions'. A legend indicates that an asterisk (*) denotes a required field. At the bottom, there are 'Next' and 'Cancel' buttons, OMB: 0938-0989, Effective date 5/06, and a 'Logout' button with 'Logged in as: XCSU296'.

Figure G 92: Additional Access Requests Drop-down List

G 6.4.1 Modify Provider/Supplier Profile (or Modify FI/Carrier/MAC Profile) – Actions in the My Current Access Profile Table

The **Current Access Profile** table *Action* field has a drop-down list of actions for each role that you have in IACS and will look like the example shown in Figure G 93.

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	End User	View User Group Details

Additional Access Request(s):

Justification for Action:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: XCSU296

Figure G 93: My Current Access Profile Table – Action Drop-down List

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

G 6.4.1.1 View User Group Details – End Users

If you are an **End User** and select **View User Group Details** from the drop-down list of actions illustrated in Figure G 93, the screen will refresh and display the appropriate information fields as illustrated in the example in Figure G 94.

As an End User, you can only view the details of the User Group to which you are associated.

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	End User	View User Group Details

Additional Access Request(s):

User Group Information

Type: Provider User Group

User Group Name: Accounting *

Company Telephone: 222-767-9999 * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: United States *

Address 1: 212 Wilson Blvd * Address 2:

City: Bethesda * State/Territory: MD * Zip Code: 20759 * -

Expected Group Size: 10 *

* indicates a required field

Cancel

OMB: 0938-0989 Effective date 5/06

Figure G 94: End User – View User Group Information Screen

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

Go to the appropriate section of this User Guide Attachment for information and instructions if you select another action.

G 6.4.1.2 View/Edit User Group Details – User Group Administrators

If you are a **User Group Administrator** and select **View/Edit User Group Details** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and display the appropriate information fields as illustrated in the example in Figure G 95.

As a User Group Administrator, you can view **and modify/edit** the User Group Information.

Note: The same steps will be followed for both **Provider** User Groups (or **FI/Carrier/MAC User Groups**) and **Surrogate User Groups**.

Access Request
 Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Hilton co (Surrogate)	Community	User Group Administrator	<input type="text" value="View/Edit User Group Details"/>

Additional Access Request(s):

User Group Information
 Type: Surrogate User Group

CMS Certification Number:

Legal Business Name:

Company Telephone: Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country:

Address 1: Address 2:

City: State/Territory: Zip Code:

Expected Group Size:

Justification for Action:

* indicates a required field

Figure G 95: User Group Administrator – View/Edit User Group Information Screen

Action: View or Modify your **User Group Information** as needed.

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.

Note: If you only wanted to view the information, you may select the **Cancel** button to exit and return to the **My Profile** screen.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.3 View Organization Details –Backup Security Officials

If you are a **Backup Security Official** and select **View Organization Details** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and display the appropriate information fields as illustrated in the example in Figure G 96.

As a Backup Security Official, you can only view the details of the Organization to which you are associated.

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Howell Medical Hospital	Not Applicable	Community	Backup Security Official	View Organization Details

Additional Access Request(s):

Organization Information

Type: Provider Organization

CMS Certification Number:

Legal Business Name: Howell Medical Hospital *

Company Telephone: 222-555-3131 * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: United States *

Address 1: 222 boston st * Address 2:

City: Baltimore * State/Territory: MD * Zip Code: 21224 * -

Expected Organization Size: 10 & above users *

* indicates a required field

Cancel

Figure G 96: Backup Security Official – Organization Information Screen

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

Go to the appropriate section of this User Guide Attachment for information and instructions if you select another action.

G 6.4.1.4 View/Edit Organization Details –Security Officials

If you are a **Security Official** and select **View/Edit Organization Details** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and display the appropriate information fields as illustrated in the example in Figure G 97.

As a Security Official, you can view **and modify/edit** the Organization Information.

Organization Information

Type: Provider Organization

CMS Certification Number:

Legal Business Name: *

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Organization Size: *

Justification for Action:

* indicates a required field

Next Cancel

Figure G 97: Security Official – View/Edit Organization Information Screen

Action: View or Modify your **Organization Information** as needed.

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.

Note: If you only wanted to view the information, you may select the **Cancel** button to exit and return to the **My Profile** screen.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.5 Disassociate from this User Group – End Users

If you are an **End User** and wish to **Disassociate from this User Group**, select that action from the drop-down list of actions in the **My Current Access Profile** table *Action* field:

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	End User	Disassociate from this User Group

Additional Access Request(s):

Confirm Action: * I confirm that I wish to remove myself from the role of **End User** from User Group: **Accounting**

Justification for Action: *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: XCSU296

Figure G 98: Disassociate from this User Group – Select and Confirm Action

Action: Select ***Disassociate from this User Group*** from the ***My Current Access Profile*** table ***Action*** field.

Note: If you do not have another role within the Organization, the ***Disassociate from this User Group*** action will also disassociate you from the Organization.

The screen will refresh and a confirmation message and check box will appear above the ***Justification for Action*** field as illustrated in Figure G 98.

Note: The message text will read, ***I confirm that I wish to remove myself from the role of <here your role will be inserted> from User Group <here the User Group Name will be inserted>***.

Action: Select the ***Check Box*** to confirm that you want to disassociate from this User Group.

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.6 Disassociate from this User Group – User Group Administrators

There are two possible scenarios for this action, as described below:

1. User Groups – More than one User Group Administrator

If you are a **User Group Administrator** and wish to select **Disassociate from this User Group** select that action from the drop-down list of actions in the **My Current Access Profile** table **Action** field:

The screenshot shows the 'Access Request' form. At the top, 'Select Action' is set to 'Modify Provider/Supplier Profile'. Below, 'Community Type' is 'Provider/Supplier'. The 'My Current Access Profile' table has the following data:

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	Disassociate from this User Group

Below the table, there is a 'Confirm Action' section with a checkbox and the text: 'I confirm that I wish to remove myself from the role of End User from User Group: Accounting'. A red arrow points to this checkbox. Below that is a 'Justification for Action' text area, also with a red arrow pointing to it. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, there is a footer with 'Logout', 'Effective date: 5/06', and 'Logged in as: XCSU296'.

Figure G 99: Disassociate from this User Group – Select and Confirm Action

Action: Select **Disassociate from this User Group** from the **My Current Access Profile** table **Action** field.

Note: If you do not have another role within the Organization, the **Disassociate from this User Group** action will also disassociate you from the Organization.

The screen will refresh and a confirmation message and check box will appear above the **Justification for Action** field as illustrated in Figure G 99.

Note: The message text will read, ***I confirm that I wish to remove myself from the role of <here your role will be inserted> from User Group <here the User Group Name will be inserted>.***

Action: Select the **Check Box** to confirm that you want to disassociate from this User Group.

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

2. User Groups – Only One User Group Administrator

If you are the only **User Group Administrator** and select **Disassociate from this User Group** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and a message will appear above the *Justification for Action* field as illustrated in Figure G 100.

Note: The message text will read, ***At least one more User Group Administrator must exist in your User Group <here the User Group Name will be inserted> to allow yourself to be disassociated from the role of <here your role will be inserted>.***

You will not be allowed to disassociate from a User Group until there is another User Group Administrator for that User Group.

Access Request

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co.	Accounting	Community	User Group Administrator	<input type="text" value="Disassociate from this User Group"/>

Additional Access Request(s):

At least one more User Group Administrator must exist in your User Group: Accounting to allow yourself to be disassociated from the role of User Group Administrator

Justification for Action:

* indicates a required field

Next Cancel

Figure G 100: Disassociate from this User Group – Warning Message

Action: Select **another action** from the drop-down list in the *Action* field or the *Additional Access Requests* field, or select the **Cancel** button to exit and return to the **My Profile** screen.

Go to the appropriate section of this User Guide Attachment for information and instructions if you select another action.

G 6.4.1.7 Disassociate from this Organization – Backup Security Officials

If you are a **Backup Security Official** and wish to select **Disassociate from this Organization**, select that action from the *Action* field in the **My Current Access Profile** table.

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Access Request

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Howell Medical Hospital	Not Applicable	Community	Backup Security Official	<input type="text" value="View Organization Details"/> <input type="text" value="Disassociate from this Organization"/>

Additional Access Request(s):

Justification for Action:

* Indicates a required field

Figure G 101: Disassociate from this Organization – Select Action

Action: Select *Disassociate from this Organization* from the *My Current Access Profile* table *Action* field as illustrated in Figure G 101.

The screen will refresh and a confirmation message and check box will appear above the *Justification for Action* field as illustrated in Figure G 102.

City: * State/Territory: * Zip Code: * -

Access Request

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Howell Medical Hospital	Not Applicable	Community	Backup Security Official	<input type="text" value="Disassociate from this Organization"/>

Additional Access Request(s):

Confirm Action: * I confirm that I wish to remove myself from the role of Backup Security Official from Organization: Howell Medical Hospital

Justification for Action:

* Indicates a required field

Figure G 102: Disassociate from this Organization – Confirm Action

Note: The message text will read, ***I confirm that I wish to remove myself from the role of** <here your role will be inserted> **from Organization** <here the Organization Name will be inserted>*.

Action: Select the **Check Box** to confirm that you want to disassociate from this Organization.

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.8 Disassociate from this Organization –Security Officials

Note: This action does not appear in the *Action* field drop-down list but it has been added to this User Guide Attachment to provide information and instructions on how to proceed if this is the action that you wish to complete.

If you are a **Security Official** and want to disassociate from your Organization, you must contact your Help Desk and request that they disassociate you from your Organization. A Backup Security Official must be approved to assume the role of Security Official prior to disassociating the Security Official from the Organization.

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.

G 6.4.1.9 Request Access to a Provider/Supplier or /FI/Carrier/MAC Application

If you wish to **Request Access to Application** in the Provider/Supplier Community, take the following action:

Figure G 103: Request Access to Applications – Select Application

Action: Select *Request Access to Application* from the *My Current Access Profile* table *Action* field.

The screen will refresh and display an **Access to Applications** area as illustrated in Figure G 103. This area contains a *Select Application* and *Justification for Action* field.

Note: Application (CARE) roles are only available to users with End User and User Group Administrator roles.

Note: The available applications in the FI/Carrier/MAC Community are different. The current drop-down list of available applications is shown in Figure G 104.

Figure G 104: Request Access to Applications – Select Application

Requesting access to an application in the Provider/Supplier and FI/Carrier/MAC User Communities is a simple two step process:

1. You must first **select the application** you want from the *Select Application* field drop-down list.
2. You must then **select your role** within that application.

Note: Applications for both Communities will be illustrated in this User Guide.

Action: Select the **Application** you want from the *Select Application* field drop-down list.

The procedures for requesting access to the applications currently available in the Provider/Supplier and FI/Carrier/MAC User Communities can be found in the following subsections. The list of applications available to you will depend on your specific Organization and User Group approved roles.

- Section G 6.4.1.9.1 – **CARE Application** – Continuity Assessment Record and Evaluation Application
- Section G 6.4.1.9.2 – **PQRI Application** – Physician Quality Reporting Initiative Application
- Section G 6.4.1.9.3 – **PS&R Application** – Provider Statistical and Reimbursement
- Section G 6.4.1.9.4 – **STAR Application** -- System Tracking for Audit and Reimbursement Application

G 6.4.1.9.1 CARE Application

When you select the CARE application from the drop-down list in the *Select Application* field the screen will refresh and display a *Role* field that contains a drop-down list of the roles in CARE that are available to you. This is illustrated in Figure G 105.

The CARE application roles are:

- **CARE Approver** – Users who have been identified as approvers for the CARE application.
- **CARE Clinician** – Users who perform CARE assessments on patients in a Provider setting.
- **CARE Data Entry Clerk** – Users who enter paper based assessment information into electronic media.
- **CARE Finalizer** – Users who perform CARE assessments on patients and finalize assessments in a Provider setting.

- **CARE Read Only** – Users who search, view, and print assessments performed by clinicians.

Note: The roles listed above are available at the time this User Guide Attachment was completed. The list of roles in the screen may vary if listed roles have been modified or other roles have been introduced.

The screenshot shows a web form for requesting access to an application. At the top, there is a 'Select Action' dropdown set to 'Modify Provider/Supplier Profile'. Below this, the 'Community Type' is 'Provider/Supplier'. A table shows the current user's profile: Organization (Greg's co), User Group (Accounting), Role Type (Community), and Role (User Group Administrator). The 'Action' dropdown is set to 'Request Access to Application'. There is an 'Additional Access Request(s)' dropdown. The 'Access to Applications' section has a link 'Request Access to Application for User Group: Accounting'. The 'Select Application' dropdown is set to 'CARE (CARE Application)'. The 'Select Role' dropdown is open, showing a list of roles: CARE Approver, CARE Clinician, CARE Data Entry Clerk, CARE Finalizer, and CARE Read Only. The 'Justification for Action' field is empty. A red asterisk indicates a required field. At the bottom left, there are 'Next' and 'Cancel' buttons.

Figure G 105: CARE Application – Select Role Drop-down List

- Action:** Select the **CARE Role** you want from the *Select Role* drop-down list.
- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.9.2 PQRI Application

When you select the PQRI application from the drop-down list in the *Select Application* field the screen will refresh and display a *Role* field that contains a drop-down list of the roles in PQRI that are available to you. This is illustrated in Figure G 106.

Note: You may request access to the PQRI application only if your Organization Information in IACS has a CMS Certification Number, CCN. If your IACS

Organization Information is missing a CCN, a message will display on screen asking you to contact your Security Official to update your Organization Information in IACS.

The PQRI application roles are:

- **PQRI Approver** – Users who have been identified as approvers for the PQRI application. An unlimited number of users can possess this role.
- **PQRI User** – Users who have been identified as the end users for the PQRI application. Up to 10 users per Organization can possess this role.
- **PQRI User Administrator** – Users who have been identified as user administrators for the PQRI application. Up to 2 users per Organization can possess this role.
- **PQRI Registry User** – Users who have been identified as registry users for the PQRI application. Up to 2 users are allowed per User Group for this role.
- **PQRI QIO User** – Users who have been identified as QIO users for the PQRI application. An unlimited number of users can possess this role.

Note: The **PQRI QIO User** role is only available to authorized members of the CMS Contractor Community.

Note: The roles listed above are available at the time this User Guide Attachment was completed. The list of roles in the screen may vary if listed roles have been modified or other roles have been introduced.

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Health and Mind	Doctors	Community	End User	Request Access to Application

Additional Access Request(s):

Access to Applications

Request Access to Application for User Group: Doctors

Select Application: PQRI (PQRI Application) *

Select Role: * Select the role within the application you want to request access to.

Justification for Action: *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure G 106: PQRI Application – Select Role Drop-down List

- Action:** Select the **PQRI Role** you want from the *Select Role* drop-down list.
- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.9.3 PS&R Application

When you select the PS&R application from the drop-down list in the *Select Application* field the screen will refresh and display a *Role* field that contains a drop-down list of the roles in PS&R that are available to you. This is illustrated in Figure G 107.

Note: You may request access to the PS&R application only if your Organization Information in IACS has a CMS Certification Number, CCN. If your IACS Organization Information is missing a CCN, a message will display on screen asking you to contact your Security Official to update your Organization Information in IACS.

The PS&R application roles are:

- **PSR User Group Administrator** – Users who have been identified as administrators for the PS&R application.
- **PSR User** – Users who have been identified as end users of the PS&R application.
- **PSR Approver** – Users who have been identified as approvers for the PS&R application.

Note: The roles listed above are available at the time this User Guide Attachment was completed. The list of roles in the screen may vary if listed roles have been modified or other roles have been introduced.

Access Request

Select Action:

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Howell Medical Hospital	Hospice Helpers	Community	End User	<input type="text" value="Request Access to Application"/>

Additional Access Request(s):

Access to Applications

[Request Access to Application for User Group: Hospice Helpers](#)

Select Application: *

Select Role: * *Select the role within the application you want to request access to.*

- PSR User Group Admin
- PSR User
- PSR Approver

Justification for Action: *

* indicates a required field

Figure G 107: PS&R Application – Select Role Drop-down List

Action: Select the **PS&R Role** you want from the *Select Role* drop-down list.

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.9.4 STAR Application

When you select the STAR application from the drop-down list in the *Select Application* field the screen will refresh and display a *Role* field that contains a drop-down list of the roles in PS&R that are available to you. This is illustrated in Figure G 108.

Note: You may request access to the STAR application only if your Organization Information in IACS has a CMS Certification Number, CCN. If your IACS Organization Information is missing a CCN, a message will display on screen asking you to contact your Security Official to update your Organization Information in IACS.

Note: Surrogate User Group users cannot request access to the STAR application.

Note: Individual Practitioners cannot obtain access to the STAR application.

The STAR application roles are:

- **STAR Approver** – Users who have been identified as approvers for the STAR application.
- **STAR Role 1** – Users who have been identified as STAR Role 1.
- **STAR Role 2** – Users who have been identified as STAR Role 2.
- **STAR Role 3** – Users who have been identified as STAR Role 3.
- **STAR Role 4** – Users who have been identified as STAR Role 4.
- **STAR Role 5** – Users who have been identified as STAR Role 5.
- **STAR Role 6** – Users who have been identified as STAR Role 6.
- **STAR Role 7** – Users who have been identified as STAR Role 7.
- **STAR Role 8** – Users who have been identified as STAR Role 8.

Note: The roles listed above are available at the time this User Guide Attachment was completed. The list of roles in the screen may vary if listed roles have been modified or other roles have been introduced.

Community Type: FI/Carrier/MAC

Organization	User Group	Role Type	Role	Action
Trailblazer Health Enterprises, LLC (VA)	Group 1 Alex	Community	End User	Request Access to Application
Trailblazer Health Enterprises, LLC (VA)	Group 2	Community	User Group Administrator	
Trailblazer Health Enterprises, LLC (VA)	Group 2	Application	STAR Role 4	
Trailblazer Health Enterprises, LLC (VA)	Group 3 (Surrogate)	Community	User Group Administrator	

Additional Access Request(s):

Access to Applications
Request Access to Application for User Group: Group 1 Alex

Select Application: STAR (STAR Application) *

Select Role: * Select the role within the application you want to request access to.

- STAR Approver
- STAR Role 1
- STAR Role 2
- STAR Role 3
- STAR Role 4
- STAR Role 5
- STAR Role 6
- STAR Role 7
- STAR Role 8

Justification for Action:

* Indicates a required field

Next Cancel

Figure G 108 : STAR Application – Select Role Drop-down List

Action: Select the **STAR Role** you want from the *Select Role* drop-down list.

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

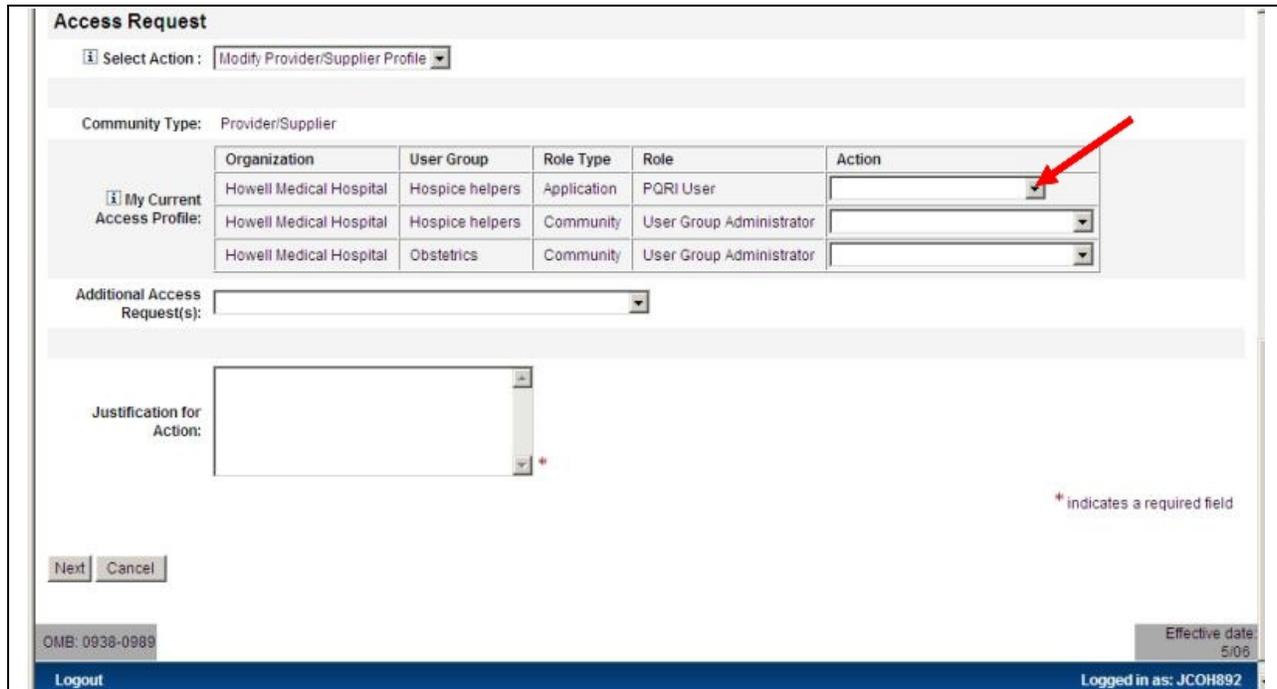
G 6.4.1.10 Remove Access from a Provider/Supplier or FI/Carrier/MAC Application

After you have been granted access to an application in the Provider/Supplier or FI/Carrier/MAC User Communities, the **Access Request** portion of your IACS Account Profile will display that information.

This User Guide Attachment will now show how to remove access to an application in the Provider/Supplier and FI/Carrier/MAC User Communities from your IACS account profile using the PQRI application to illustrate this.

Note: This process, however, is the same for all applications in the Provider/Supplier and FI/Carrier/MAC User Communities to which you have been given access.

When you select the **Modify Provider/Supplier Profile** (or **Modify FI/Carrier/MAC Profile**) action from the **Select Action** field drop-down list, the screen will refresh and display the **My Current Access Profile** table with your User Community and Application roles as illustrated in Figure G 109.



Access Request

Select Action: **Modify Provider/Supplier Profile**

Community Type: Provider/Supplier

	Organization	User Group	Role Type	Role	Action
My Current Access Profile:	Howell Medical Hospital	Hospice helpers	Application	PQRI User	[Action Dropdown]
	Howell Medical Hospital	Hospice helpers	Community	User Group Administrator	[Action Dropdown]
	Howell Medical Hospital	Obstetrics	Community	User Group Administrator	[Action Dropdown]

Additional Access Request(s): [Dropdown]

Justification for Action: [Text Area]

* indicates a required field

Next Cancel

OMB: 0938-0988 Effective date 5/06

Logout Logged in as: JCOH892

Figure G 109: My Current Access Profile Table – Community and Application Roles

Action: Review the **My Current Access Profile** table for the application role you wish to remove.

Note: The application role is specific to the User Group within your Organization. An End User or User Group Administrator may have different roles for the same application in different User Groups. When you select the action you want from the **Action** field in the **My Current Access Profile** table please be careful to select the **Action** field from the correct role as illustrated in Figure G 110.

Access Request

Select Action:

Community Type: Provider/Supplier

	Organization	User Group	Role Type	Role	Action
My Current Access Profile:	Howell Medical Hospital	Hospice helpers	Application	PQRI User	<input type="text" value=""/>
	Howell Medical Hospital	Hospice helpers	Community	User Group Administrator	<input type="text" value=""/>
	Howell Medical Hospital	Obstetrics	Community	User Group Administrator	<input type="text" value=""/>

Additional Access Request(s):

Justification for Action:

* Indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: JCOH892

Figure G 110: Remove Access from PQRI Application – Select Action

Action: Select the **Remove Access from PQRI** action from the *Action* field drop-down list in the row displaying the application role you wish to remove, in this example, 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 G 111.

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Howell Medical Hospital	Hospice helpers	Application	PQRI User	Remove Access from: PQRI
Howell Medical Hospital	Hospice helpers	Community	User Group Administrator	
Howell Medical Hospital	Obstetrics	Community	User Group Administrator	

Additional Access Request(s):

Confirm Action: * I confirm that I wish to remove myself from the role of PQRI User from User Group: Hospice helpers

Justification for Action: Required to remove access.

* Indicates a required field

Next Cancel

Figure G 111: Remove Access from PQRI Application – Confirm and Justify Action

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.1.11 Associate this User Group to another Organization – Surrogate User Groups

You may notice minor differences in this type of modification to your IACS profile depending on whether you are in the Provider/Supplier or FI/Carrier/MAC community.

Note: Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 114 and the instructions which follow that figure.

1. Modify FI/Carrier/MAC Profile

The follow section applies to users In the FI/Carrier/MAC User Community who select the **Modify FI/Carrier/MAC Profile** from the *Selection Action* field drop-down list.

If you are a **User Group Administrator** of a Surrogate User Group and select **Associate this User Group to another Organization** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and display a new **Associate Group to Organization** area with an *Organizations* field above the *Justification for Action* field as illustrated in Figure G 112.

Professional Contact Information

Office Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: Company Telephone: Ext:

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Access Request

Select Action:

Community Type: FI/Carrier/MAC

Organization	User Group	Role Type	Role	Action
TESTORG1114-02	NGC Test MAC (Surrogate)	Community	User Group Administrator	<input type="text"/>
TESTORG1114-02	National Heritage Insurance Company (So. CA) (Surrogate)	Community	User Group Administrator	<input type="text"/>
TESTORG1114-02	TEST GROUP (Surrogate)	Community	User Group Administrator	Associate this User Group to another Organization

Additional Access Request(s):

Associate Group to Organization

Organization(s): *

Justification for Action: *

* indicates a required field

Figure G 112: FI/Carrier/MAC – Associate This User Group to Another Organization

Action: Select the **Organization** you want from the *Organizations* drop-down list.

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

2. Modify Provider/Supplier Profile

The follow section applies to users In the Provider/Supplier User Community who select the **Modify Provider/Supplier Profile** from the *Selection Action field* drop-down list.

If you are a **User Group Administrator** of a Surrogate User Group and select **Associate this User Group to another Organization** from the drop-down list of actions in the **My Current Access Profile** table *Action field*, the screen will refresh and a message will appear above the *Justification for Action field* as illustrated in Figure G 113.

The message text will read, **Please click Next to accept the Terms and Conditions. Further information will be requested later.** These Terms and Conditions will be for the User Group Administrator role. This step is required because you will be assuming the role of User Group Administrator in the new Organization.

Access Request

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Hilton co (Surrogate)	Community	User Group Administrator	<input type="text" value="Associate this User Group to another Organization"/>

Additional Access Request(s):

Please click Next to accept the Terms and Conditions. Further information will be requested later.

Justification for Action:

* Indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/08

Logout Logged in as: XGG819

Figure G 113: Provider/Supplier – Associate This User Group to Another Organization

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 screen will refresh and a Terms and Conditions screen for the User Group Administrator role will be displayed as illustrated in Figure G 114.

CMS Centers for **Medicare & Medicaid** Services LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

User Group Administrator - Terms and Conditions

If you want to print the text on this screen, select the **Print** icon to the right of the text before taking any other action on the screen.

To skip printing and continue with your registration, read the text, select the **I Accept the above Terms and Conditions** box, and then the **I Accept** button at the bottom of this screen.

A User Group Administrator is the person who can register the User Group within an Organization and update the User Group profile information in IACS. There can be multiple User Group Administrators for the same User Group within an Organization. The User Group Administrator is trusted to approve the access requests of End Users for that User Group. The User Group Administrator is approved by the Security Official or Backup Security Official.

Print

To continue, you must accept the terms and conditions. If you decline, your registration will automatically be cancelled.

I Accept the above Terms and Conditions

I Accept **I Decline** **Back**

Figure G 114: User Group Administrator – Terms and Conditions Screen

Action: Read all of the ***Terms and Conditions*** on the screen by 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 as illustrated in Figure G 2.

After you select the ***I Accept the above Terms and Conditions*** box and the ***I Accept*** button, the screen will refresh and display a new **Associate Group to Organization** area with an **Organization Search** section above the **Justification for Action** field as illustrated in Figure G 115.

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Hilton co (Surrogate)	Community	User Group Administrator	Associate this User Group to another Organization

Additional Access Request(s):

Associate Group to Organization

Organization Search

Search for the Organization you want to find the User Group in. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: United States *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Justification for Action: *

* indicates a required field

Figure G 115: Associate Group to Organization – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **Modify Account Profile** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with those illustrated in Figure G 18.

All Organizations matching your criteria will display in the **Organizations** field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official's request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.

2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

Figure G 116: Associate Group to Organization – Select Organization

Action: Select your desired **Organization** from the drop-down list in the **Organizations** field.

If you want to search for a different organization, select the **New Search** button.

Note: If more than one Organization is found, the drop-down list will display them all.

Figure G 117: Associate Group to Organization – Justify Action

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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2 Modify Provider/Supplier (or FI/Carrier/MAC) Profile – Additional Access Requests

The drop-down list of actions in the *Additional Access Requests* field is briefly described below and illustrated in Figure G 118. Details on the roles, functions and responsibilities, and instructions on how to complete these actions follow in this User Guide Attachment.

User Group Actions

- **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
- **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.

- **Associate to a User Group as an End User** – This action will require you to assume the role of User Group Administrator as you assume the role of End User for an existing User Group within an IACS Organization.

Individual Practitioner Actions

Note: This action is only available for users in the Provider/Supplier community.

- **Create an Individual Practitioner Profile** – This action will use your IACS User and Professional Contact Information to create an Individual Practitioner Profile for you. Additional information on Individual Practitioners in IACS can be found in the IACS User Guide Attachment F – Individual Practitioner.

Organization Actions

- **Create a new Organization** – This action will require you to assume the role of Security Official as you create an IACS Organization.
- **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.

Access Request

Select Action:

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	<input type="text"/>
Greg's co	Accounting	Application	CARE Read Only	<input type="text"/>

Additional Access Request(s):

Justification for Action:

- User Group Actions**
 - Create a new User Group
 - Associate to a User Group as an Administrator
 - Associate to a User Group as an End User
- Individual Practitioner Actions**
 - Create an Individual Practitioner Profile
- Organization Actions**
 - Create a new Organization
 - Associate to an Organization as a Backup Security Official

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: XCSU296

Figure G 118: Additional Access Requests Drop-down List

Action: Select the desired action from the *Additional Access Requests* field drop-down list.

G 6.4.2.1 Create a new User Group

If you select the **Create a New User Group** action, the screen will refresh and display two options with radio buttons under the Additional Access Requests field as illustrated in Figure G 119. The two options are: Create a User Group within your Organization and Create a User Group outside your Organization. You must select one of these options.

Access Request

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	End User	<input type="text"/>
	Greg's co	Accounting	Application	CARE Read Only	<input type="text"/>

Additional Access Request(s):

Action: Create a User Group within your Organization Create a User Group outside your Organization

Justification for Action:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: XCSU296

Figure G 119: User Group Creation Options – Within or Outside your Organization

Action: Select where you want to create the new User Group by selecting the radio button next to the option you want.

Note: If you select **Create a User Group within your Organization**, these options are presented as illustrated in Figure G 120.

Note: If you select **Create a User Group outside your Organization**, you will be presented with **Organization Search** input fields as illustrated in Figure G 123. These options will be presented **after you find and select** the new Organization.

Note: Regardless of where you are creating this User Group, the options to create a Provider (or FI/Carrier/MAC) or Surrogate User Group will always be presented to you as explained above.

Access Request

Select Action:

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	<input type="text"/>
Greg's co	Accounting	Application	CARE Read Only	<input type="text"/>

Additional Access Request(s):

Action: Create a User Group within your Organization Create a User Group outside your Organization

Group Type: Create a Provider User Group Create a Surrogate User Group

Justification for Action:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: YC51296

Figure G 120: User Group Creation Options – Provider (or FI/Carrier/MAC) or Surrogate User Group

Action: Select the type of new User Group you want to create by selecting the radio button next to the option you want.

After you select the type of User Group you want to create, the screen will refresh and display the appropriate input fields for the User Group Information. The input fields that display will depend on the type of User Group being created and where the User Group is being created.

The following subsections describe the procedures for each of the four possible combinations available. They are:

Within Your Organization

1. Create a **Provider (or FI/Carrier/MAC)** User Group **within** your Organization (Section G 6.4.2.2)
2. Create a **Surrogate** User Group **within** your Organization (Section G 6.4.2.3)

Outside Your Organization

3. Create a **Provider or (FI/Carrier/MAC)** User Group **outside** your Organization (Section G 6.4.2.4)
4. Create a **Surrogate** User Group **outside** your Organization (Section G 6.4.2.5)

G 6.4.2.2 Create a Provider (or FI/Carrier/MAC) User Group Within Your Organization

If you select to create a **Provider or (FI/Carrier/MAC) User Group** *within* your Organization, the screen will refresh and display input fields for you to enter information on the new Provider User Group as illustrated in Figure G 121.

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define the User Group.

Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete is illustrated in Figure G 114 and the instructions which follow that figure.

Figure G 121: Provider User Group Information

Action: Enter the **Taxpayer Identification Number**, TIN, or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the User Group in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Action: Enter the **User Group Name** in the **User Group Name** field. The User Group name must be unique within the Organization. If the User Group has a unique TIN, the User Group Name must be the Legal Business Name associated with the TIN or SSN. The legal business name is the name specified on the IRS CP-575 Form.

Action: Enter the correspondence information for the User Group in the **Company Telephone, Country, Address 1, City, State/Territory, and Zip Code** fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will change to allow the entry of foreign address information such as Province or Postal Code.

Action: Enter the number of people you expect to register in IACS for the User Group in the *Expected Group Size* field.

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.3 Create a Surrogate User Group Within Your Organization

If you select to create a **Surrogate** User Group *within* your Organization, the screen will refresh and display input fields for you to enter information on the new Surrogate User Group as illustrated in Figure G 122.

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define the User Group.

Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 114 and the instructions which follow that figure.

Surrogate User Group Information

TIN / SSN: * CMS Certification Number: CMS Certification Number (formerly known as OSCAR Number) pertains to Medicare Part-A

Legal Business Name: * The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Group Size: * Specify the expected size of your User Group.

Justification for Action:

Next Cancel

OMB: 0938-0989

Figure G 122: Surrogate User Group Information

Action: Enter the **Taxpayer Identification Number**, TIN or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the Surrogate User Group in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Note: The **CMS Certification Number** was previously known as the OSCAR Number and pertains to Medicare Part A Institutional Providers. Enter this number if the Surrogate User Group has one.

Note: Provide any required information for the FI/Carrier/MAC community that is requested by IACS. One example of this additional information would be the Medicare Contractor ID number.

Action: Enter the **Legal Business Name** of the User Group. The User Group name must be unique within the Organization. The legal business name is the name specified on the IRS CP-575 Form.

Action: Enter the correspondence information for the User Group in the *Company Telephone, Country, Address 1, City, State/Territory, and Zip Code* fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will change to allow the entry of foreign address information such as Province or Postal Code.

Action: Enter the number of people you expect to register in IACS for the User Group in the **Expected Group Size** field.

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.4 Create a Provider (or FI/Carrier/MAC) User Group Outside Your Organization

If you select **Create a User Group outside your Organization**, the screen will refresh and display an **Organization Search** input area as illustrated in Figure G 27.

Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 114 and the instructions which follow that figure.

A Provider User Group must be associated with an Organization. Therefore, your first step is to select the Organization to which your Provider User Group will be associated. This is a simple two step process.

1. Search IACS to find your Organization.
2. Select the Organization for your Provider User Group.

Figure G 123: User Group Administrator – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **Modify Account Profile** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

You must provide, at a minimum, all or part of the Legal Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 124.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official’s request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

<input type="button" value="i"/> My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	End User	<input type="button" value="v"/>
	Greg's co	Accounting	Application	CARE Read Only	<input type="button" value="v"/>

Additional Access Request(s): Create a new User Group

Action: Create a User Group within your Organization Create a User Group outside your Organization

Organization Details

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): Select an Organization * [Click 'New Search' to search for a new Organization](#)

Select an Organization
wess.org (catonsville, MD)

Justification for Action:

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Logged in as: XCSU296

Figure G 124: User Group Administrator – Select Organization

Action: Select your desired *Organization* from the drop-down list in the *Organizations* field.

If you want to search for a different organization, select the **New Search** button.

After you select your Organization the screen will refresh and display additional options of creating a Provider (or FI/Carrier/MAC) or a Surrogate User Group as illustrated in Figure G 125.

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	[Dropdown]
Greg's co	Accounting	Application	CARE Read Only	[Dropdown]

Additional Access Request(s): [Create a new User Group]

Action: Create a User Group within your Organization Create a User Group outside your Organization

Organization Details
Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): [wess org (catonsville, MD)] * [New Search] [Click 'New Search' to search for a new Organization](#)

Group Type: Create a Provider User Group Create a Surrogate User Group

Justification for Action: [Text Area]

* indicates a required field

Next Cancel

Figure G 125: User Group Creation Options – Provider (or FI/Carrier/MAC) or Surrogate User Group

Action: Select the type of new User Group you want to create by selecting the radio button next to the option you want.

Action: Select the **Create a Provider (or FI/Carrier/MAC) User Group** radio button.

After you select the type of User Group you want to create, the screen will refresh and display the appropriate User Group Information input fields. The input fields that display will depend on the type of User Group being created.

Figure G 126: User Group Administrator – Provider (or FI/Carrier/MAC) User Group Information

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define the User Group.

Action: Enter the **Taxpayer Identification Number**, TIN, or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the User Group in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Action: Enter the **User Group Name** in the **User Group Name** field. The User Group name must be unique within the Organization. If the User Group has a unique TIN, the User Group Name must be the Legal Business Name associated with the TIN or SSN. The legal business name is the name specified on the IRS CP-575 Form.

Action: Enter the correspondence information for the User Group in the **Company Telephone**, **Country**, **Address 1**, **City**, **State/Territory**, and **Zip Code** fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will change to allow the entry of foreign address information such as Province or Postal Code.

Action: Enter the number of people you expect to register in IACS for the User Group in the **Expected Group Size** field.

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.5 Create a Surrogate User Group Outside Your Organization

If you select **Create a User Group outside your Organization**, the screen will refresh and display an **Organization Search** input area as illustrated in Figure G 127.

Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 114 and the instructions which follow that figure.

A Surrogate User Group must be associated with an Organization. Therefore, your first step is to select the Organization to which your Surrogate User Group will be associated. This is a simple two step process.

1. Search IACS to find your Organization.
2. Select the Organization for your Surrogate User Group.

The screenshot shows a web form for creating a user group. At the top, there are tabs for 'Greg's co', 'Accounting', 'Application', and 'CARE Read Only'. Below this is a dropdown menu for 'Additional Access Request(s)' with 'Create a new User Group' selected. An 'Action' section has two radio buttons: 'Create a User Group within your Organization' (unselected) and 'Create a User Group outside your Organization' (selected). The 'Organization Search' section contains several input fields: 'TIN / SSN' (empty), 'Legal Business Name' (empty with an asterisk), 'Country' (dropdown menu showing 'United States' with an asterisk), 'City' (empty), and 'State/Territory' (dropdown menu with an asterisk). A 'Search' button is located below these fields. A note in blue text reads: 'Note: You must provide at least part of the Legal Business Name & State and then click 'Search'. You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.' Below the search fields is a 'Justification for Action' text area (empty) with an asterisk. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, a legend indicates '* indicates a required field'.

Figure G 127: User Group Administrator – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **Modify Account Profile** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

You must provide, at a minimum, all or part of the Legal Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 128.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official’s request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

Select Action:

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	<input type="text"/>
Greg's co	Accounting	Application	CARE Read Only	<input type="text"/>

Additional Access Request(s):

Action: Create a User Group within your Organization Create a User Group outside your Organization

Organization Details

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): * [Click 'New Search' to search for a new Organization](#)

wess.org (catonsville, MD)

Justification for Action:

* indicates a required field

OMB: 0938-0989 Effective date
5/06

Logged in as: XCSU296

Figure G 128: User Group Administrator – Select Organization

Action: Select your desired *Organization* from the drop-down list in the *Organizations* field.

If you want to search for a different organization, select the **New Search** button.

After you select your Organization the screen will refresh and display additional options of creating a Provider (or FI/Carrier/MAC) or a Surrogate User Group as illustrated in Figure G 129.

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	
Greg's co	Accounting	Application	CARE Read Only	

Additional Access Request(s): Create a new User Group

Action: Create a User Group within your Organization Create a User Group outside your Organization

Organization Details
 Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): wess org (catonsville, MD) * [Click 'New Search' to search for a new Organization](#)

Group Type: Create a Provider User Group Create a Surrogate User Group

Justification for Action:

* indicates a required field

Figure G 129: User Group Creation Options – Provider (or FI/Carrier/MAC) or Surrogate User Group

Action: Select the type of new User Group you want to create by selecting the radio button next to the option you want.

Action: Select the **Create a Surrogate User Group** radio button.

After you select the type of User Group you want to create, the screen will refresh and display the appropriate User Group Information input fields. The input fields that display will depend on the type of User Group being created.

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define the User Group.

Surrogate User Group Information

TIN / SSN: * CMS Certification Number: CMS Certification Number (formerly known as OSCAR Number) pertains to Medicare Part A

Legal Business Name: * The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Group Size: * Specify the expected size of your User Group.

Justification for Action:

Next Cancel

OMB: 0938-0989

Figure G 130: User Group Administrator –Surrogate User Group Information

Action: Enter the **Taxpayer Identification Number**, TIN, or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the Surrogate User Group in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Note: The **CMS Certification Number** was previously known as the OSCAR Number and pertains to Medicare Part A Institutional Providers. Enter this number if the Surrogate User Group has one.

Note: Provide any required information for the FI/Carrier/MAC community that is requested by IACS. One example of this additional information would be the Medicare Contractor ID number.

Action: Enter the **Legal Business Name** of the User Group. The User Group name must be unique within the Organization. The legal business name is the name specified on the IRS CP-575 Form.

Action: Enter the correspondence information for the User Group in the *Company Telephone, Country, Address 1, City, State/Territory, and Zip Code* fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will

change to allow the entry of foreign address information such as Province or Postal Code.

Action: Enter the number of people you expect to register in IACS for the User Group in the **Expected Group Size** field.

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.6 Associate to a User Group as an Administrator – Within your Organization

If you select **Associate to a User Group as an Administrator**, the screen will refresh and display two options with radio buttons under the *Additional Access Requests* field as illustrated in Figure G 131. The two options are: **Associate to a User Group within your Organization** and **Associate to a User Group outside your Organization**. You must select one of these options.

Note: Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 114 and the instructions which follow that figure.

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	User Group Administrator	▼

Additional Access Request(s): Associate to a User Group as an Administrator

Associate to User Group

Action: Associate to a User Group within your Organization Associate to a User Group outside your Organization

Justification for Action: *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: BAPG682

Figure G 131: Associate to a User Group – Within or Outside Your Organization

Action: Select where your new User Group is located by selecting the appropriate radio button.

Note: If you select **Associate to a User Group within your Organization**, the screen will refresh and display as illustrated in Figure G 132.

Note: If you select **Associate to a User Group outside your Organization**, you will be presented with **Organization Search** input fields as illustrated in Figure G 135.

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	User Group Administrator	

Additional Access Request(s): Associate to a User Group as an Administrator

Associate to User Group

Action: Associate to a User Group within your Organization Associate to a User Group outside your Organization

User Group(s): Select a User Group *

Justification for Action: *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: BAPG682

Figure G 132: Associate to a User Group – Select User Group

Action: Select the *User Group* that you want from the *User Groups* field drop-down list.

When you select User Group its name will appear in the *User Groups* field as illustrated in Figure G 133.

Figure G 133: Associate to a User Group – Justify Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.7 Associate to a User Group as an Administrator – Outside your Organization

If you select **Associate to a User Group as an Administrator**, the screen will refresh and display two options with radio buttons under the *Additional Access Requests* field as illustrated in Figure G 134. The two options are: **Associate to a User Group within your Organization** and **Associate to a User Group outside your Organization**. You must select one of these options.

Note: Please note that anytime IACS displays a role-specific Terms and Conditions screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 114 and following.

Access Request

Select Action:

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	User Group Administrator	<input type="text" value=""/>

Additional Access Request(s):

Associate to User Group

Action: Associate to a User Group within your Organization Associate to a User Group outside your Organization

Justification for Action:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: BAPG682

Figure G 134: Associate to a User Group – Within or Outside

Action: Select where your new User Group is located by selecting the appropriate radio button.

Note: If you select **Associate to a User Group within your Organization**, the screen will refresh and display as illustrated in Figure G 132.

Note: If you select **Associate to a User Group outside your Organization**, you will be presented with **Organization Search** input fields as illustrated in Figure G 135.

Associate to User Group

Associate to a User Group within your Organization Associate to a User Group outside your Organization

Organization Search

Search for the Organization you want to find the User Group in. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: *

City: State/Territory: *

Note: You must provide at least part of the Legal Business Name & State and then click 'Search' You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

Justification for Action:

* indicates a required field

Figure G 135: Associate to a User Group – Organization Search

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **Modify Account Profile** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

You must provide, at a minimum, all or part of the Legal Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an **Organizations** field as illustrated in Figure G 136.

All Organizations matching your criteria will display in the **Organizations** field. This field contains a drop-down list of the Organizations from which you can select from the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official's request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

The screenshot shows a web form for associating a user group with an organization. At the top, the 'Community Type' is 'Provider/Supplier'. Below this is a table with columns for 'Organization', 'User Group', 'Role Type', 'Role', and 'Action'. The 'Organization' column contains 'Greg's co', 'User Group' contains 'Accounting', 'Role Type' contains 'Community', and 'Role' contains 'User Group Administrator'. The 'Action' column has a dropdown menu. Below the table is an 'Additional Access Request(s)' dropdown menu set to 'Associate to a User Group as an Administrator'. The main section is titled 'Associate to User Group' and contains two radio buttons: 'Associate to a User Group within your Organization' (unselected) and 'Associate to a User Group outside your Organization' (selected). Below this is the 'Organization Details' section, which includes a dropdown menu for 'Organization(s)' with a 'New Search' button and a link to 'Click 'New Search' to search for a new Organization'. The dropdown menu is open, showing 'wess.org (catonsville, MD)'. Below the dropdown is a 'Justification for Action' text area. At the bottom left are 'Next' and 'Cancel' buttons. A note at the bottom right states '* indicates a required field'.

Figure G 136: User Group Administrator – Select Organization

Action: Select your desired **Organization** from the drop-down list in the **Organizations** field.

If you want to search for a different organization, select the **New Search** button.

When you select your Organization, the screen will refresh and display a **User Groups** field containing a drop-down list of User Groups associated with the selected Organization as illustrated in Figure G 137.

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	wilcox supplies	Pharmacy	Community	User Group Administrator	<input type="button" value="v"/>

Additional Access Request(s): Associate to a User Group as an Administrator

Associate to User Group

Action: Associate to a User Group within your Organization Associate to a User Group outside your Organization

Organization Details

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): Howell Medical Hospital (Baltimore, MD) * [Click 'New Search' to search for a new Organization](#)

User Group(s): Select a User Group *
 Select a User Group
 Hospice helpers
 Obstetrics

Justification for Action:

* indicates a required field

Figure G 137: User Group Administrator – Select User Group

Action: Select the desired *User Group* from the drop-down list in the *User Group* field.

When you have finished selecting the desired Organization and User Group, you must enter a justification statement indicating the reason you are requesting this action.

Figure G 138: Associate to a User Group – Justify Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.8 Associate to a User Group as an End User

If you select the **Associate to a User Group as an End User**, the screen that displays will look like the screen illustrated in Figure G 131 except that the option shown in the **Additional Access Requests** drop-down list will be **Associate to a User Group as an End User**.

The procedures for associating to a User Group as an End User are the same as those for associating to a User Group as an Administrator. Please refer to Section G 6.4.2.6 of this document for steps involved in those procedures.

G 6.4.2.9 Create a New Organization

If you select the **Create a New Organization** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and a message will appear above the *Justification for Action* field as illustrated in Figure G 139.

The message text will read, **Please click Next to accept the Terms and Conditions. Further information will be requested later.** These Terms and Conditions will be for the Security Official role. This step is required because you will be assuming the role of Security Official in the new Organization.

Note: If you choose to create a new Organization, you must accept the responsibilities associated with the role of Security Official.

- The Security Official is the person who both **registers the Organization** in IACS and who is **responsible for managing** that Organization. Managing the Organization includes such activities as:
- Approving the access requests of Backup Security Officials
- Approving the access requests of User Group Administrators
- Approving the creation of User Groups within the Organization
- Approving access requests for various applications used within the Organization
- Updating, as needed, the Organization Information in IACS

Note: Additionally, CMS holds the Security Official fully accountable for the organizational behavior of all IACS users in the Organization, both those they may have approved as well as those users approved by other individuals.

Company name: Greg's co Company Telephone: Company FAX:

Country: United States *

Address 1: 212 wilson blvd * Address 2:

City: Bethesda * State/Territory: MD * Zip Code: 20859 * -

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	User Group Administrator	

Additional Access Request(s): Create a new Organization

Please click **Next** to accept the Terms and Conditions. Further information will be requested later.

Justification for Action: Need.

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: BAPG69Z

Figure G 139: Create a New Organization

Action: Enter a brief statement for the **Justification for Action**. 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 screen will refresh and a **Terms and Conditions** screen for the Security Official role will be displayed as illustrated in Figure G 140.

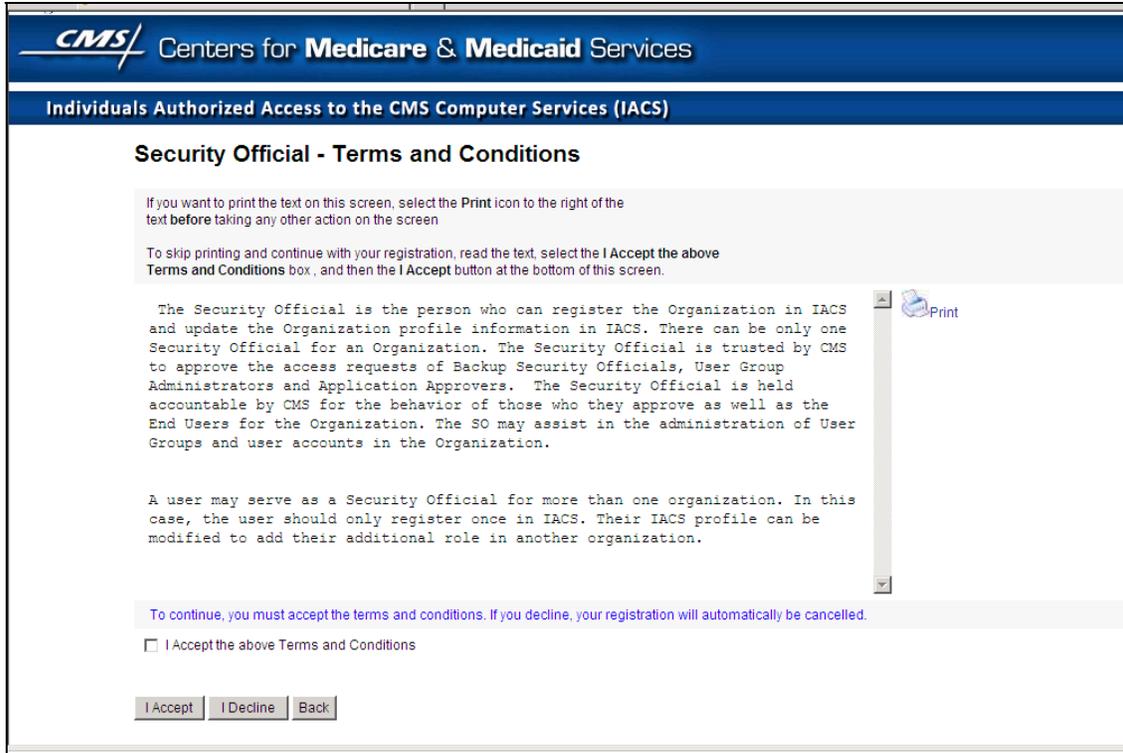


Figure G 140: Terms and Conditions – Security Official Screen

Action: Read all of the **Terms and Conditions** on the screen by moving down the screen as needed.

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

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

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

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 as illustrated in Figure G 2.

After you select the **I Accept the above Terms and Conditions** box and the **I Accept** button, the screen will refresh and display a new **Organization Information** section above the **Justification for Action** field as illustrated in Figure G 141.

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

<input type="button" value="i"/> My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	User Group Administrator	<input type="button" value="v"/>

Additional Access Request(s): Create a new Organization

Organization Information

TIN / SSN: * CMS Certification Number:

Legal Business Name: * The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Please select if the Organization's Address and Telephone Number Information is same as the User's Address and Telephone Number

Company Telephone: * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: United States *

Address 1: * Address 2:

City: * State/Territory: * Zip Code: * -

Expected Organization Size: *

Figure G 141: Organization Information Screen

Provide all required information. All required fields must be completed. Required fields are indicated by an asterisk (*) to the right of the field. Providing optional information will help to further define your Organization.

Action: Enter the **Taxpayer Identification Number**, TIN, or **Social Security Number**, SSN, (if used for taxpayer reporting purposes) of the Organization in the **TIN/SSN** field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service, IRS, CP-575 Form.

Note: The **CMS Certification Number** was previously known as the OSCAR Number and pertains to Medicare Part A Institutional Providers. Enter this number if the Surrogate User Group has one.

Note: Provide any required information for the FI/Carrier/MAC community that is requested by IACS. One example of this additional information would be the Medicare Contractor ID number.

Action: Enter the **Legal Business Name** of the Organization. The legal business name is the name specified on the IRS CP-575 Form.

If the Organization's address and telephone number are not the same as your professional address, take the following action.

Action: Enter the **correspondence information** for the Organization in the **Company Telephone, Country, Address 1, City, State/Territory, and Zip Code** fields.

Note: If the Organization has a foreign address, when you select a country other than the United States, the screen will refresh and input fields will

change to allow the entry of foreign address information such as Province or Postal Code.

Note: The valid input format of the telephone number, fax number, phone extensions, and Postal Code will vary depending on the foreign country selected.

After the *Legal Business Name* field there is a check box with the following message next to it: *Please select if the Organization's Address and Telephone Number Information is the same as the User's Address and Telephone Number.*

Note: Select the **Check Box** if the address and telephone number of the Organization you are creating is the same as your professional address and telephone number. The system will automatically populate your address and telephone number information in the appropriate *Organization Information* fields.

Action: Select the **Expected Organization Size** from the drop-down list in the *Expected Organization Size* field. This field refers to the number of expected users to register in IACS for the Organization.

Note: For the *Expected Organization Size* field, you have two options provided in a drop-down selection box. If you select the information icon a message will display. This icon is displayed as a graphic: a small blue letter *i* inside a white box. The options and messages are as follows:

- 1.) If you select the option: **1-9 users** and select the information icon a message will display that reads as follows:
 - *This will be considered as a **Small Organization**. Small Organizations must have a Security Official. If End Users will register in the Organization, then at least one User Administrator must create a User Group for End Users to register. User Group Administrators and End Users may also request application access.*
- 2.) If you select the option: **10 & above users** and select the information icon a message will display that reads as follows:
 - *This will be considered a Mid-sized to Large-sized Organization. Your Organization must follow a hierarchy of one Security Official, User Group Administrators), and End Users. The Organization may also have one or more Backup Security Officials. User Group Administrators and End Users may also request application access.*

When you have completed providing the required *Organization Information* check the justification statement you entered earlier. If you need to adjust it, do so now indicating the reason you are requesting this action as illustrated in Figure G 142.

Access Request

Community Type: Provider/Supplier

Role: Security Official

Organization Information

TIN / SSN: 22-5699999 * CMS Certification Number:

Legal Business Name: Howell Medical Hospital * The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Please select if the Organization's Address and Telephone Number Information is same as the User's Address and Telephone Number

Company Telephone: 410-594-1110 * Ext: Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax: Ext: Valid Fax Number Format is XXX-XXX-XXXX

Country: United States *

Address 1: 112 Howell Blvd. * Address 2:

City: Baltimore * State/Territory: MD * Zip Code: 21206 * -

Expected Organization Size: 10 & above users *

Justification for Action: *

* indicates a required field

OMB: 0938-0989
Effective date 5/06

Figure G 142: Create New Organization – Justify Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

When you select the **Next** button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure G 143.

U.S. Department of Health & Human Services

CMS Centers for **Medicare & Medicaid** Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Modify Request Confirmation

You made changes to your profile.

To submit your request please click **Submit** button.
If you want to edit your changes please click **Edit** Button.
If you want to cancel the changes, which you made please click **Cancel** button

OMB: 0938-0989

[Logout](#)

Figure G 143: Modify Request Confirmation Screen

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

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

- 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 G 144. You must select the **OK** button to complete your account profile modification.

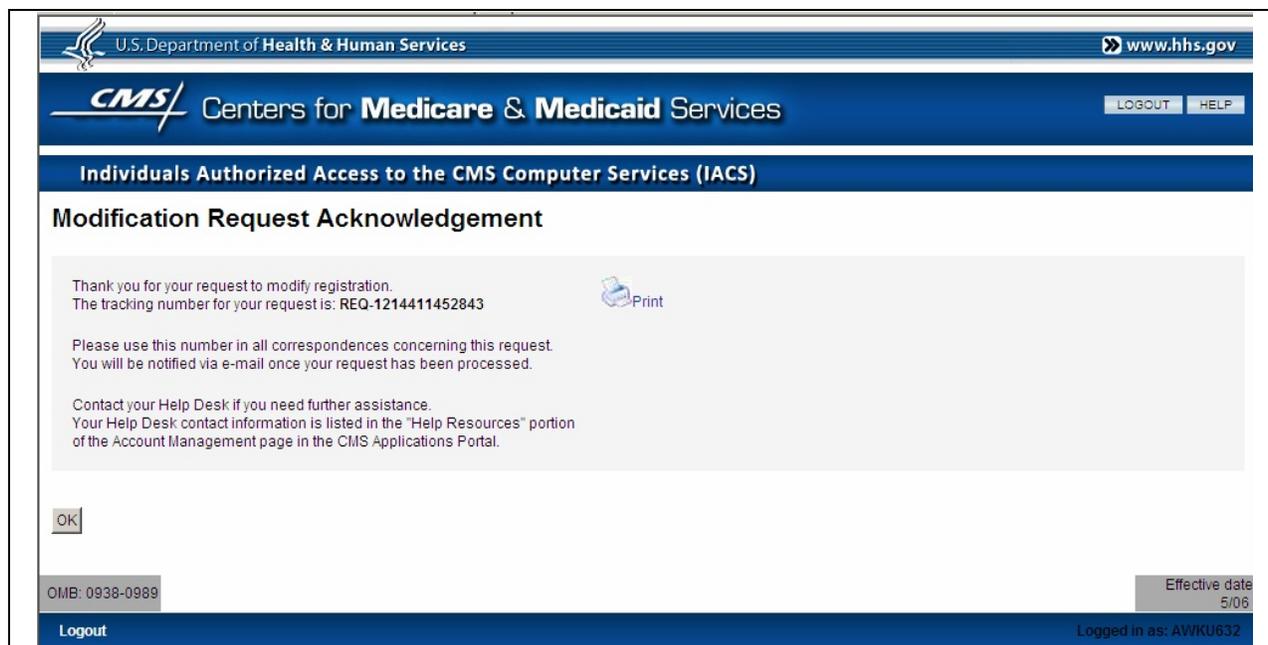


Figure G 144: Modification Request Acknowledgement Screen

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

G 6.4.2.9.1 Create a New Organization – After Account Profile Modification

After you complete your IACS Modify Account Profile request, you will be sent an email confirming that IACS has received your request and giving you a Request Number Figure G 145 presents an example of the email providing your Request Number. You should use that request number if you need to contact your Help Desk regarding your request.

If you are registering in the Provider/Supplier community and 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@cgi.com.

Please have your request number from the Registration Acknowledgement screen available when calling your Help Desk. If you email your Help Desk, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

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

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

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 145: Request Number Email

For users in the Provider/Supplier community, in addition to the registration acknowledgement email, you will receive a separate email request asking you to mail a hard copy of your Organization's **Internal Revenue Service, IRS, CP-575 Form** or other documentation to CMS' External User Services, EUS, in order to complete the registration of your Organization in IACS.

This email contains EUS' contact information and mailing address. An example of the **CP-575 Form – Request Email** is shown in Figure G 146.

Recipient: User requesting Security Official role

Subject: Information Needed for Processing IACS Request Number <Request Number of IACS Request>

This e-mail is in reference to your submitted IACS request with the following Request Number: <Request Number of IACS Request>

In order to process your submitted IACS request, a copy of your organization's CP-575 form from the Internal Revenue Services (IRS) is required. This form is available from the IRS and is the letter received granting a Taxpayer Identification Number.

Mail a copy of the IRS CP-575 to CMS' External User Services (EUS) who will be facilitating the registration process. EUS can be contacted at the following address and telephone number:

External User Services
PO Box 792750
San Antonio, Texas 78216
Phone: 1-866-484-8049
E-mail: EUSsupport@cgi.com

Thank you,

External User Services (EUS)

Figure G 146: CP-575 Form – Request Email

Note: The text of this email may vary slightly from the example shown.

Action: Mail the requested documentation to EUS.

Note: If your Organization does not have a copy of the IRS CP-575 Form, you may obtain a copy from the Internal Revenue Service, IRS. Contact information can be found at <http://www.irs.gov> on the IRS website.

G 6.4.2.10 Associate to an Organization as a Backup Security Official

If you select the **Associate to an Organization as a Backup Security Official** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and a message will appear above the *Justification for Action* field as illustrated in Figure G 147.

The message text will read, **Please click Next to accept the Terms and Conditions. Further information will be requested later.** These Terms and Conditions will be for the Backup Security Official role. This step is required because you will be assuming the role of Backup Security Official in the Organization.

Note: If you choose to associate in this role to an Organization, you must accept the responsibilities associated with the role of Backup Security Official.

The Backup Security Official is the person who assists the Organization's Security Official with approval and administrative tasks. The responsibilities of the Backup Security official include such activities as:

- Approving the access requests of User Group Administrators
- Approving the creation of User Groups within the Organization
- Approving access requests for various applications used within the Organization
- Assisting IACS users in the Organization with IACS tasks.

Company Name: western meds Company Telephone: EXT:

Country: United States *

Address 1: 222 rolling rd * Address 2:

City: catonsville * State/Territory: MD * Zip Code: 21228 * -

Access Request

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Western meds	billing	Community	User Group Administrator	

Additional Access Request(s): Associate to an Organization as a Backup Security Official

Please click **Next** to accept the Terms and Conditions. Further information will be requested later.

Justification for Action:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure G 147: Associate to an Organization as a Backup Security Official

Action: Enter a brief statement for the *Justification for Action*. 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 screen will refresh and a **Terms and Conditions** screen for the Backup Security Official role will be displayed as illustrated in Figure G 148.

CMS Centers for **Medicare & Medicaid** Services LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

Backup Security Official - Terms and Conditions

If you want to print the text on this screen, select the **Print** icon to the right of the text **before** taking any other action on the screen

To skip printing and continue with your registration, read the text, select the **I Accept the above Terms and Conditions** box, and then the **I Accept** button at the bottom of this screen.

A Backup Security Official performs many of the same functions as a Security Official in an Organization. There can be one or more Backup Security Officials in an Organization. The Backup Security Official can approve the access request of User Group Administrators and Application Approvers, and may aid the Security Official with the administration of User Groups and user accounts in the Organization.

Print

To continue, you must accept the terms and conditions. If you decline, your registration will automatically be cancelled.

I Accept the above Terms and Conditions

I Accept **I Decline** **Back**

CMS: 0020.0000 Effective date: 5/08

Figure G 148: Backup Security Official – Terms and Conditions Screen

Action: Read all of the **Terms and Conditions** on the screen by moving down the screen as needed.

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

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

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

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 as illustrated in Figure G 2.

After you select the **I Accept the above Terms and Conditions** box and the **I Accept** button, the screen will refresh and display an **Organization Search** section above the **Justification for Action** field as illustrated in Figure G 149.

Access Request

Select Action: Modify Provider Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	St. Joseph (Balt., MD)	Alvin Associates	Community	End User	▼

Additional Access Request(s): Associate to an Organization as a Backup Security Official

Associate to Organization

Organization Search

Search for the Organization you want to associate with. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

TIN / SSN:

Legal Business Name: *

Country: United States *

City: State/Territory: ▼ *

Search Note: You must provide at least part of the Legal Business Name & State and then click 'Search'

Justification for Action: *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/08

Figure G 149: Associate to Organization – Organization Search Screen

Action: Enter your Organization information in the fields provided in the **Organization Search** portion of the **Modify Account Profile** screen. This information will be used as **search criteria** by IACS to find your Organization.

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

Action: Select the **Search** button.

You must provide, at a minimum, all or part of the Legal Business Name of the Organization and the Country and State/Territory in the Organization’s address. Providing optional information such as the Organization’s Taxpayer Identification Number, TIN, or Social Security Number, SSN, (if used for taxpayer reporting purposes) will help to focus your search better.

Note: If the Organization has a foreign address, you must provide all or part of the Business Name of the Organization and the Country and State/Province in the Organization’s address.

When you select the **Search** button, the system will search for Organizations matching the search criteria you have entered.

When Organizations are found matching your search criteria, the screen will refresh and the Organization Search fields will be replaced with an *Organizations* field as illustrated in Figure G 150.

All Organizations matching your criteria will display in the *Organizations* field. This field contains a drop-down list of the Organizations from which you can select the desired name.

Sometimes, however, the Organization Search does not find any Organization matching your search criteria. There are several reasons that could result in no Organization being found.

1. The Organization may not have been created yet.
 - a. The Security Official’s request to establish the Organization may not be approved yet.
 - b. The Security Official did not submit the request to establish the Organization.
2. You may have entered your search criteria incorrectly.
3. The Organization may have been deleted from IACS.

Check with your Security Official if a or b apply; otherwise correct your search parameters. If not, contact your Help Desk for assistance in finding your Organization.

The screenshot shows the 'Associate to Organization' section of the IACS system. It includes a dropdown menu for 'Organization(s)' with a list of options: 'Select an Organization', 'ST Joseph (Balto, MD)', 'Saint Joseph's Hospital (Towson, MD)', and 'So Co 1 (Columbia, MD)'. There are also buttons for 'Next' and 'Cancel', and a footer with 'Logout' and 'Effective date 5/06'.

Figure G 150: Associate to Organization – Select Organization

Action: Select your desired *Organization* from the drop-down list in the *Organizations* field.

If you want to search for a different organization, select the **New Search** button.

After you have selected your Organization, you must enter a justification statement indicating the reason you are requesting this action as illustrated in Figure G 151.

Access Request

Select Action:

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Howell Medical Hospital	Obstetrics	Application	CARE Approver	<input type="text"/>
Howell Medical Hospital	Obstetrics	Community	End User	<input type="text"/>
Howell Medical Hospital	Obstetrics	Application	PQRI User	<input type="text"/>

Additional Access Request(s):

Associate to Organization

Organization(s): * [Click 'New Search' to search for a different Organization](#)

Justification for Action: *

* indicates a required field

Figure G 151: Associate to Organization – Justify Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.4.2.11 Create an Individual Practitioner Profile

If you select the **Create an Individual Practitioner Profile** from the drop-down list of actions in the **My Current Access Profile** table *Action* field, the screen will refresh and display the Individual Practitioner **Terms and Conditions** screen.

Note: Please note that anytime IACS displays a role-specific **Terms and Conditions** screen to you, you must accept in order to continue. A sample screen and the Actions you need to complete are illustrated in Figure G 148 and following.

After you have accepted the Individual Practitioner Terms and Conditions, the screen will refresh and display as illustrated in Figure G 152.

IACS will create your Individual Practitioner profile from information you have already provided in your User Information and Professional Contact Information when registering in IACS.

Figure G 152: Create an Individual Practitioner Profile – Justify Action

Action: Enter a brief justification statement in the *Justification for Action* field. This justification field must include the reason you are requesting this action. For example, *Require for work, etc.*

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

- 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.

Note: There are no further actions for you to take on this profile modification.

Go to Section 6.7 of this User Guide Attachment for information and instructions on how to complete this **Modify Account Profile** process.

G 6.5 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 G 153. The applications you will be able to add are those applications integrated with IACS and outside your User Community. These are illustrated in Figure G 154.

The screenshot shows the 'Access Request' form with the 'Select Action' dropdown menu open. The menu options are: View My Access Profile, Modify Provider Profile, Add Application, Add Community, and View My Access Profile. The 'Add Application' option is highlighted. Below the dropdown, the form is divided into three main sections: 'View My Access Profile' (showing 'Provider: Provider user'), 'Profile Summary' (showing 'Organization / User Group (Role): Howell Medical Hospital / Hospice Helpers (End User)'), and 'Possible Actions'. The 'Possible Actions' section is divided into 'As an End User' (with radio buttons for 'View User Group Details', 'Request access to applications like PECOS/PSR', and 'Disassociate from User Group') and 'Additionally, you can:' (with radio buttons for 'Create an Organization profile', 'Associate to an Organization', 'Create a User Group', and 'Associate to a User Group'). A 'Cancel' button is located at the bottom left. A note at the bottom right states '* indicates a required field'.

Figure G 153: Select Action – Add Application

The *Select Application* field contains a drop-down list of the CMS applications integrated with IACS as illustrated in Figure G 154.

The screenshot shows the 'Access Request' form with the 'Select Action' dropdown menu set to 'Add Application'. The 'Select Application' dropdown menu is open, showing a list of applications: Select Application, MA/MA-PD/PDP/CC, CBO/CSR, COB, and HETS UI. The 'Select Application' option is highlighted. Below the dropdown, the form includes a 'Justification for Action' field. A 'Next' button and a 'Cancel' button are located at the bottom left. A note at the bottom right states '* indicates a required field'. At the bottom of the form, there is a footer area with 'OMB: 0938-0989', 'Effective date: 5/06', 'Logout', and 'Logged in as: rick123'.

Figure G 154: Select Application Drop-down List

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

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

- **Attachment A – MA/MA-PD/PDP/CC** – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts
- **Attachment B – CBO/CSR** – Community Based Organization/Customer Service Representative
- **Attachment C – COB** – Coordination of Benefits – VDSA and COBA Organizations
- **Attachment D – HETS-UI** – HIPPA Eligibility Transaction System User Interface

G 6.6 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 **Error! Reference source not found.**

The screenshot shows a web form titled "Access Request". At the top, there is a "Select Action:" dropdown menu with "Add Community" selected. Below this is a "Select Community:" dropdown menu with "Select Community" and an asterisk. To the right of the "Select Community" dropdown is a small asterisk with the text "* indicates a required field". Below these is a "Justification for Action:" text area with an asterisk. At the bottom left are "Next" and "Cancel" buttons. At the bottom right, there is a "Logout" button. In the footer, there is "OMB: 0938-0989" on the left, "Effective date: 5/08" on the right, and "Logged in as: DBER937" in the bottom right corner.

Figure 155: Select Action – Add Community

The *Select Community* field contains a drop-down list of the other CMS communities integrated with IACS as illustrated in Figure G 156

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.

The screenshot displays the 'Access Request' form. At the top, there is a 'Select Action' dropdown menu with 'Add Community' selected. Below this is the 'Select Community' dropdown menu, which is currently open, showing a list of options: 'Select Community', 'FI/Carrier/MAC', 'DMEPOS', 'Demonstrations', and 'CMS Contractor'. The 'Select Community' option is highlighted. To the right of the 'Select Community' dropdown is a text input field for 'Justification for Action:'. A red asterisk is placed to the right of the 'Justification for Action' field, indicating it is a required field. Below the form, there are 'Next' and 'Cancel' buttons. At the bottom of the page, there is a footer with 'Logout' on the left, 'Effective date: 5/06' on the right, and 'Logged in as: XIEX042 Your password will expire in 13 day(s).' in the center.

Figure G 156: Select Community Drop-down List

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

Note: If you have a role in a Community, that Community will not display in the drop-down list.

Action: Enter a brief justification statement for your action in the *Justification for Access* field.

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

G 6.7 Generic – Complete the Modify Account Profile Process

When you select the **Next** button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure G 157.

U.S. Department of Health & Human Services

CMS Centers for **Medicare & Medicaid** Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Modify Request Confirmation

You made changes to your profile.

To submit your request please click **Submit** button.
If you want to edit your changes please click **Edit** Button.
If you want to cancel the changes, which you made please click **Cancel** button

OMB: 0938-0989

[Logout](#)

Figure G 157: Modify Request Confirmation Screen

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

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

- 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 G 158. You must select the **OK** button to complete your account profile modification.

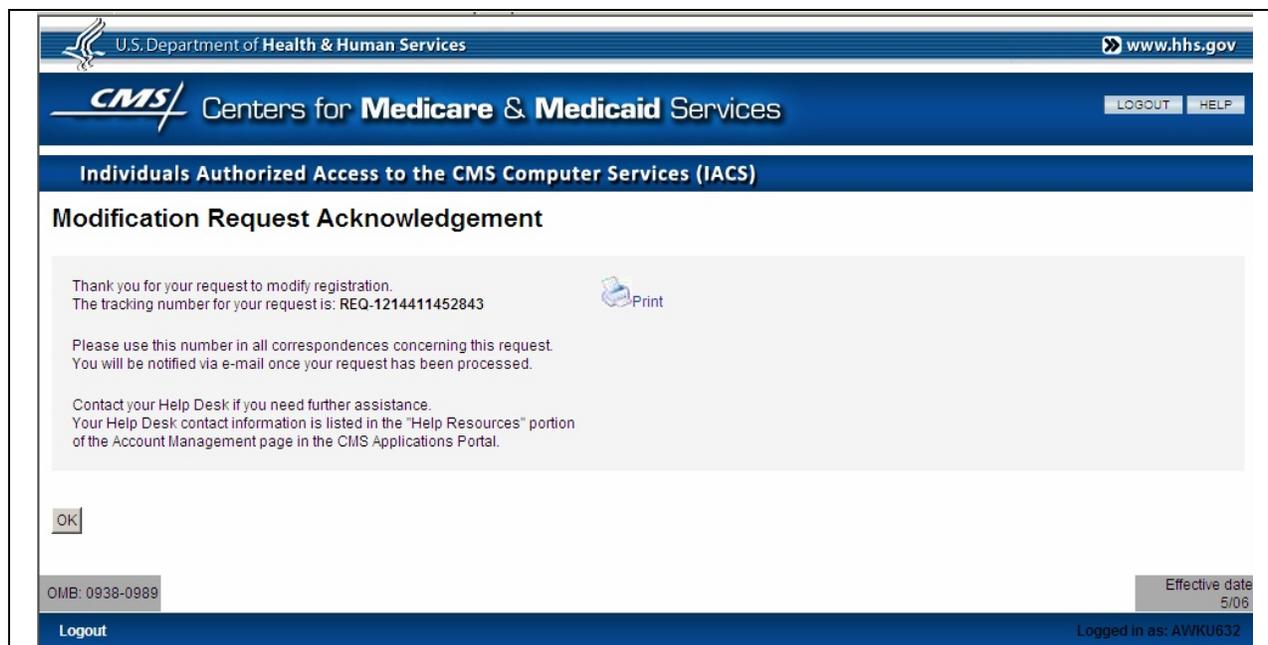


Figure G 158: Modification Request Acknowledgement Screen

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

G 6.7.1 Generic – 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 EUSsupport@cgi.com.

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

G 7.0 Additional IACS Procedures

G 7.1 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 G 159. If, however, you have forgotten your password, you can follow the actions listed below.

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

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

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

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

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

User ID

Password

Figure G 159: Login to IACS Screen

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 try to enter your password three times, but enter the incorrect password each time. If your account is locked, you will not be able to access the **Forgot Your Password?** functionality. You must contact your Help Desk to unlock your account and reset your password. When your Help Desk resets your password, you will be sent an email with the temporary, one-time password which you may then use to login to IACS where you will be prompted to change the password.

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

A **Security Questions** screen will display as illustrated in Figure G 160.

The screenshot shows the 'Security Questions' screen within the IACS system. At the top, there is a header for the U.S. Department of Health & Human Services (www.hhs.gov) and the CMS Centers for Medicare & Medicaid Services. Below this, a blue bar indicates 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main content area is titled 'Security Questions' and asks the user to answer the following questions:

- Last 4 digits of SSN: * Please enter valid last 4 digits of your SSN
- E-mail: * Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: New User

Figure G 160: Security Questions Screen

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 authentication 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 G 161. 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 the questions incorrectly three times in a row, your account will be locked. You must call your Help Desk to have them unlock your account.

U.S. Department of Health & Human Services

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Identify User

Please answer the following questions. Answers will be automatically converted to upper-case.

Account ID 123ABCD

What city were you born in

What year did you graduate from high school

Logout

Figure G 161: Password Identify User Screen

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 G 162. This email notification contains a temporary, one-time password.

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

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.

Login to IACS

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

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

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

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

User ID

Password

Figure G 162: Password Email Notification Screen

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: Your IACS Password Has Been Reset**

Figure G 163 illustrates a sample password notification email that you would receive.

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

Log into IACS using your User ID and password to change your password.

Thank you,
IACS

Please do not reply to this system-generated email.

Figure G 163: Password Notification Email

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 EUSupport@cqi.com.

Action: Go to Section 4.0, in this User Guide Attachment, 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.

G 7.2*Forgot Your User ID?*

Please note that this functionality is currently available **only** to IACS users who were required to enter their **Date of Birth** during their registration process.

Other users will need to contact their Help Desk for assistance if they forget their IACS User ID.

When you login to IACS, you are required to enter your User ID and Password. If you have forgotten your User ID, **and were required to enter your date of birth during your registration in IACS**, you can select the **Forgot Your User ID?** hyperlink on the **Account Management** screen as illustrated in Figure G 164.

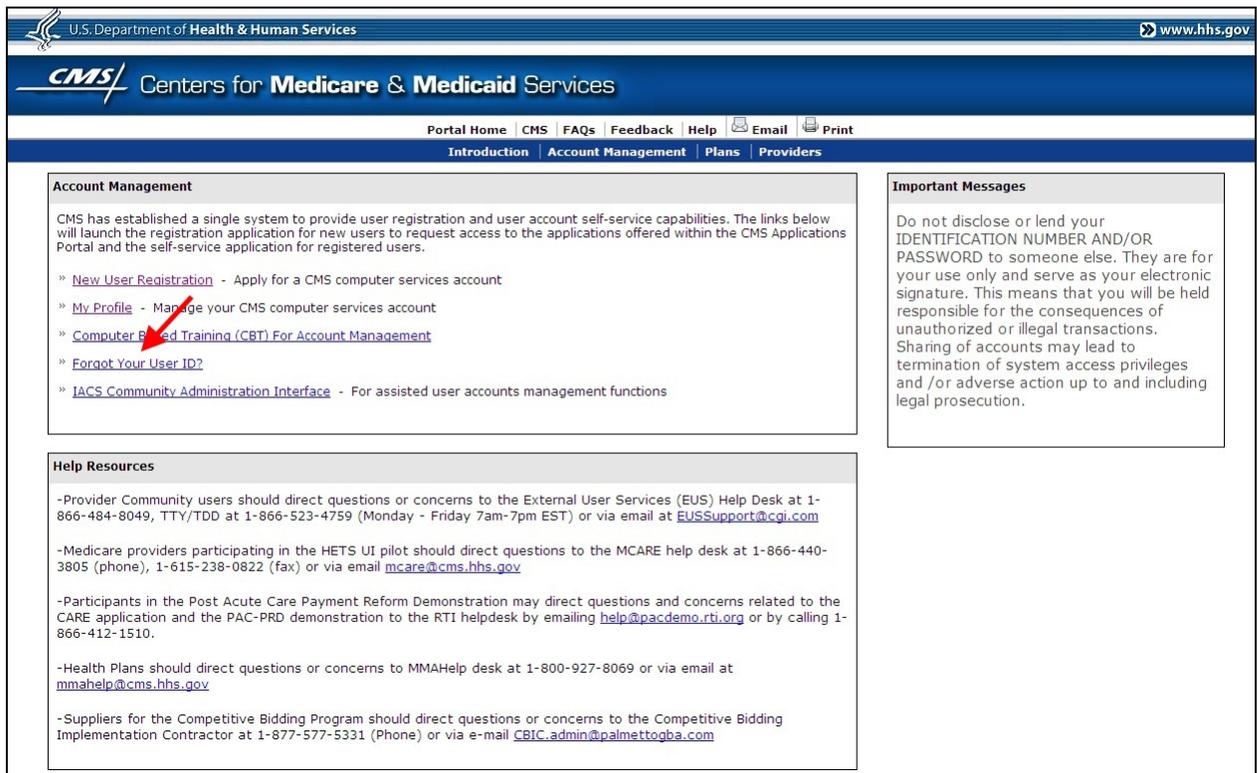


Figure G 164: Account Management Screen – Forgot Your User ID? Hyperlink

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

The **Forgot Your User ID?** screen will display as illustrated in Figure G 165.

U.S. Department of Health & Human Services

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Forgot Your User ID?

Please enter the following information and your User ID will be emailed to you after your account is validated:

First Name *

Last Name *

Date of Birth * (mm/dd/yyyy)

Social Security Number * Valid SSN Format is XXX-XX-XXXX

Email *

Figure G 165: Forgot Your User ID? Screen

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 G 166. This screen will display authentication questions you answered during your initial login. You must provide correct answers to the authentication questions displayed.

If you answer incorrectly the questions three times in a row, your account will be locked. You must then contact your Help Desk to unlock your account. For help desk contact information, see Section G 8.5 Help Desk Information.

U.S. Department of Health & Human Services

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

User ID Recovery - Authentication

Please answer the secret questions below.

What city were you born in?

What year did you graduate from high school?

Figure G 166: User ID Recovery - Authentication Screen

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 G 167. 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 correct any information, 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.

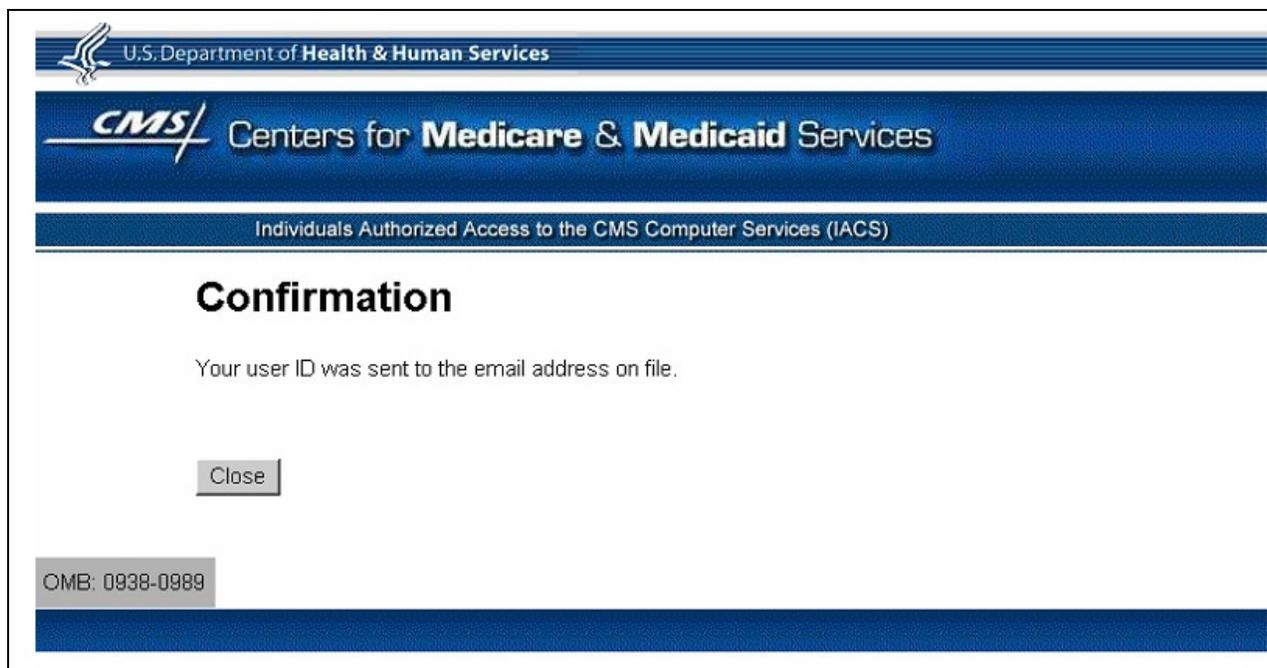


Figure G 167: User ID Recovery Confirmation Screen

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

Figure G 168 illustrates an example of the email you will receive providing your IACS User ID.

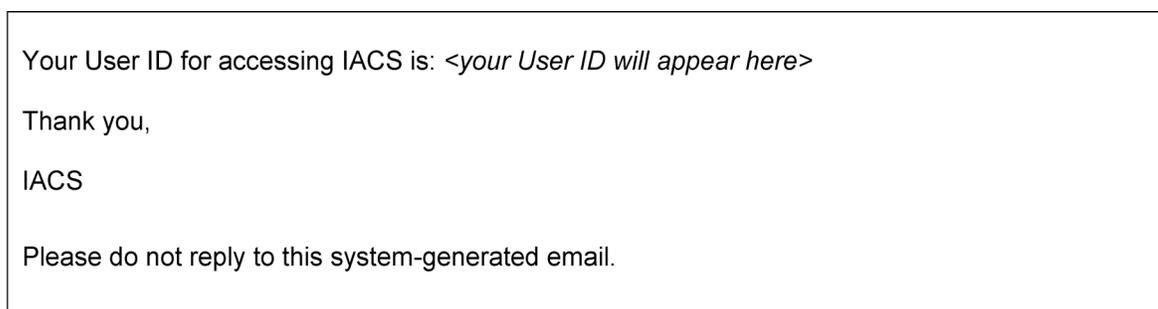


Figure G 168: User ID Email

G 8.0 IACS Questions and Help

G 8.1 Frequently Asked Questions - FAQs

The CMS FAQ page is a resource for IACS information. Please go to the CMS FAQ page as follows:

Action: Browse 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 G 8.5 in this document.

G 8.2 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.

G 8.3 Online Training – IACS Computer-Based Training – CBT

IACS provides selected Computer Based Training, CBT, units to help users understand IACS processes and to walk them through sample, generic 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 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 G 169.

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

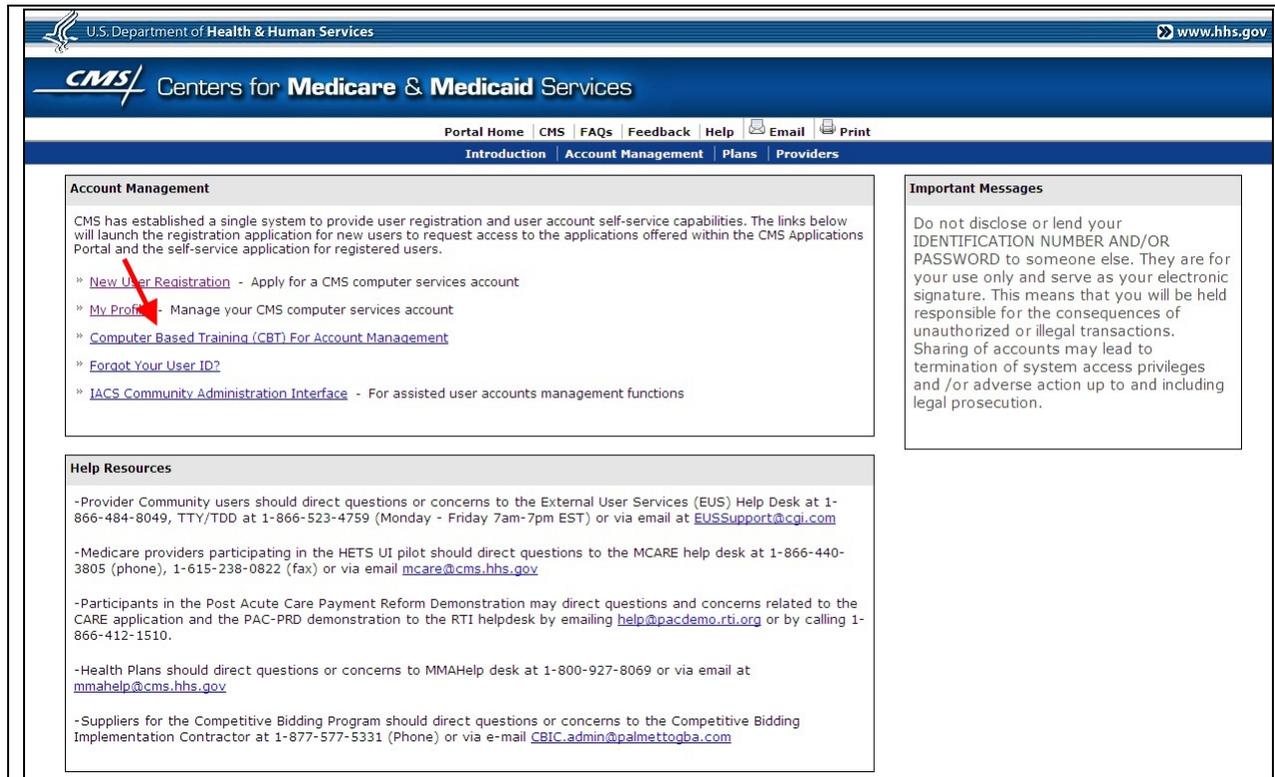


Figure G 169: Account Management Screen – Computer-Based Training Hyperlink

The **IACS Computer-Based Training (CBT)** main menu screen will display as illustrated in Figure G 170.

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.

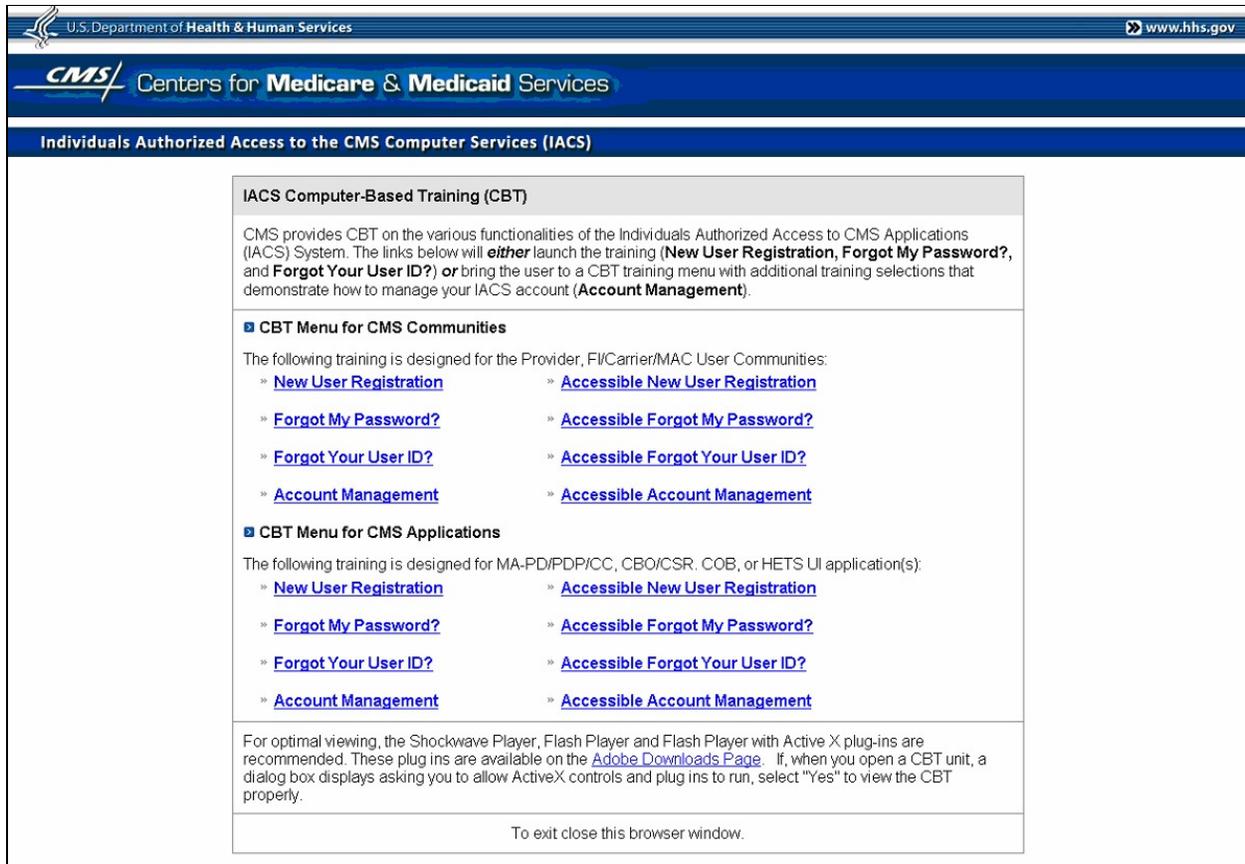


Figure G 170: IACS CBT Main Menu Screen

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

G 8.4 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 8.5.

G 8.5 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.

G 9.0 Role Terms and Conditions Text

G 9.1 End User – Terms and Conditions

An End User is trusted to perform Medicare business for the Organization. An End User is part of a User Group within the Organization. End Users may belong to multiple User Groups in one or more Organizations.

G 9.2 User Group Administrator – Terms and Conditions

A User Group Administrator is the person who can register the User Group within an Organization and update the User Group profile information in IACS. There can be multiple User Group Administrators for the same User Group within an Organization. The User Group Administrator is trusted to approve the access requests of End Users for that User Group. The User Group Administrator is approved by the Security Official or Backup Security Official.

G 9.3 Backup Security Official – Terms and Conditions

A Backup Security Official performs many of the same functions as a Security Official in an Organization. There can be one or more Backup Security Officials in an Organization. The Backup Security Official can approve the access request of User Group Administrators and Application Approvers, and may aid the Security Official with the administration of User Groups and user accounts in the Organization.

G 9.4 Security Official – Terms and Conditions

The Security Official is the person who can register the Organization in IACS and update the Organization profile information in IACS. There can be only one Security Official for an Organization. The Security Official is trusted by CMS to approve the access requests of Backup Security Officials, User Group Administrators and Application Approvers. The Security Official is held accountable by CMS for the behavior of those who they approve as well as the End Users for the Organization. The SO may assist in the administration of User Groups and user accounts in the Organization.

A user may serve as a Security Official for more than one organization. In this case, the user should only register once in IACS. Their IACS profile can be modified to add their additional role in another organization.

G 9.4 Individual Practitioner – Terms and Conditions

For purposes of IACS, an Individual Practitioner is a physician or a non-physician practitioner who:

- will use IACS personally, and
- will not have employees who will use IACS.

A physician or non-physician practitioner and their staff using IACS must register as a provider organization in IACS. For more information go to

<http://www.cms.hhs.gov/MLN MattersArticles/downloads/SE0747.pdf> on the CMS website.

A user requesting the role of Individual Practitioner will be issued a temporary IACS account to use until he/she is verified as an enrolled Medicare Supplier. If a provider registers in IACS in order to enroll via the web, this should provide time to complete the enrollment process.

If enrollment verification does not take place within 180 days, the temporary account will be disabled.

End of IACS User Guide, Attachment G