NORTHROP GRUMMAN

Individuals Authorized Access to CMS Computer Services

(IACS)

User Guide – Attachment A

MA/MA-PD/PDP/CC – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts

DRAFT

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12/12/2006	7.2	Updated based on customer comments.	Elaine Purcell
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CONTENTS

FIGURES

This attachment provides instructions on completing the "Required Access" portion of the "New User Registration" screen for Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts (MA/MA-PD/PDP/CC). This attachment also provides instructions on modifying your account profile as well as instructions on how to access your desired CMS plans.

A-1.0 MA/MA-PD/PDP/CC Specific Registration Fields

Action: In the **Access Request** section, choose **MA/MA-PD/PDP/CC** for **User Type**. (See Figure A-1)

Figure A-1: Access Request Portion of the New User Registration Screen

The screen will refresh and display an MA/MA-PD/PDP/CC related Role field as shown in Figure A-2.

Figure A-2: MA/MA-PD/PDP/CC Related Field

> **Action:**   In the ***Role*** field, you may select ***User/Submitter*** (sends and receives data files, may look up data using the MARx/MBD user interface) or ***User/Representative*** (looks up data using the MARx/MBD user interface; does not send/receive data files) as your user role. The Role selection options are in a drop down list and appear as shown in Figure A-3.

Figure A-3: MA/MA-PD/PDP/CC Role Field

A-1.1   MA/MA-PD/PDP/CC – User/Submitter Role

When you select the user role of User/Submitter, the screen will refresh and Contract Number fields will be displayed as shown in Figure A-4. You may enter a Contract Number (example: Hxxxx,9xxxx, Rxxxx or Sxxxx) as a User/Submitter, a Prescription Drug Event (PDE) submitter, or a Risk Adjustment Processing System (RAPS) submitter. You can enter Contract Numbers in any, or all, of the Contract Number fields as they apply to your work.

Action: Enter **Contract Numbers** (example: Hxxxx, 9xxxx, Rxxxx, or Sxxxx) one at a time, and click **Add** (See Figure A-4).

Figure A-4: MA/MA-PD/PDP/CC Contract Number Fields – User/Submitter

- Contract numbers must be entered one at a time. Click **Add** after each entry.

- If you enter an invalid contract number, the screen will refresh and an error message will appear near the top of the screen informing you of the error and requesting that you enter a valid contract number. Scroll down the page to the Contract Number/s field/s and enter a valid contract number.

NOTE: Once contract numbers have been added to the registration screen, they cannot be changed or removed. If you enter an incorrect contract number, you can either cancel your registration request and do a new request or continue with your current request and inform your EPOC of the error. Your EPOC can then deny that specific contract access request.

After the Contract Number/s is entered, the screen will refresh and display the entered Contract Numbers in separate, labeled fields as shown in Figure A-5. Below the entered Contract Number fields is a field for you to enter your RACF ID.

Action: Enter a **RACF ID**, if you have one.

Figure A-5: MA/MA-PD/PDP/CC RACF ID Field

Note: The RACF ID should be entered in all UPPER case. If your RACF ID is not known, STOP and call the applicable Help Desk for your user community to obtain your RACF ID information.

Attention Existing CMS System Users: If you have already been assigned a RACF ID to access CMS systems (e.g. HPMS), you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN.   Once you've been approved as an IACS user, your RACF and IACS passwords will automatically synchronize, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

Action:　　Enter a brief statement for the ***Justification for Access.*** This justification field must include a valid reason for access. (See Figure A-6)

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

Figure A-6: MA/MA-PD/PDP/CC Justification for Access Field

When you click on *Next*, 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 mandatory fields not filled in, the system will redisplay the "New User Registration" screen. The top part of the screen will be shown with error messages informing you of data that needs to be corrected or mandatory fields that still need to be filled in.

When the data in all fields are valid and all mandatory fields have been completed, the system will display a "Review Registration Details" screen in which you can review the information you entered in the "New User Registration" screen. Go to **Section 2.4 – Completion of Registration Process** in the Main Body of the User Guide for an example of the "Review Registration Details" screen. This section also provides the procedure for completing the IACS registration process.

A-1.2   MA/MA-PD/PDP/CC – User/Representative Role

When you select the user role of **User/Representative**, the screen will refresh and a Contract Number field will be displayed as shown in Figure A-7.

Action: Enter *Contract Numbers* (example: Hxxxx, 9xxxx, Rxxxx, or Sxxxx) one at a time, and click *Add*.

Figure A-7: MA/MA-PD/PDP/CC Contract Number Fields – User/Representative

- Contract numbers must be entered one at a time. Click **Add** after each entry.

- If you enter an invalid contract number, the screen will refresh and an error message will appear near the top of the screen informing you of this and requesting that you enter a valid contract number. Scroll down the page to the Contract Number/s field/s and enter a valid contract number.

NOTE: Once contract numbers have been added to the registration screen, they cannot be changed or removed. If you enter an incorrect contract number, you can either cancel your registration request and do a new request or continue with your current request and inform your EPOC of the error. Your EPOC can then deny that specific contract access request.

After the Contract Number/s is entered, the screen will refresh and display the entered Contract Number/s. Below the entered Contract Number field is a field for you to enter your RACF ID.

Action: Enter a **RACF ID**, if you have one.

Figure A-8: MA/MA-PD/PDP/CC RACF ID Field

Note: The RACF ID should be entered in all UPPER case. If your RACF ID is not known, STOP and call the applicable Help Desk for your user community to obtain RACF ID information.

Attention Existing CMS System Users: If you have already been assigned a RACF ID to access CMS systems (e.g. HPMS), you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN.   Once you've been approved as an IACS user, your RACF and IACS passwords will automatically synchronize, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

Action: Enter a brief statement for the *Justification for Access.* This justification field must include a valid reason for access. (See Figure A-9)

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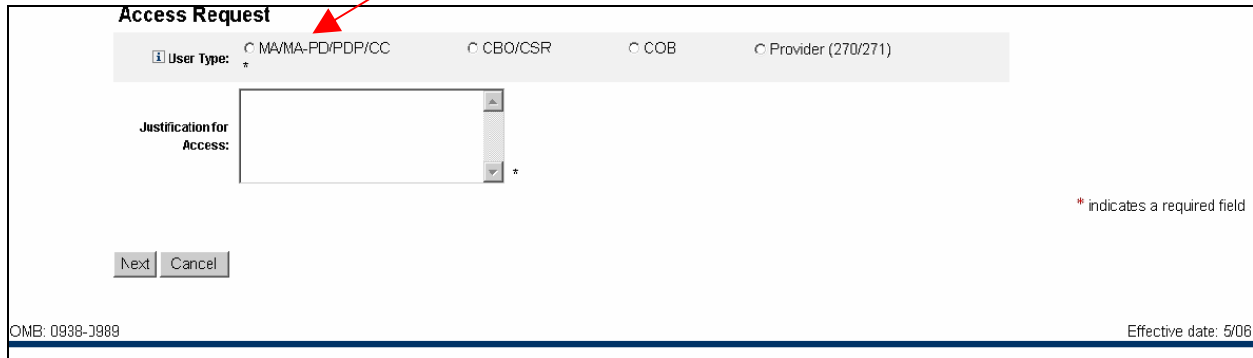

Figure A-9: MA/MA-PD/PDP/CC Justification for Access Field

When you click on *Next*, 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 mandatory fields not filled in, the system will redisplay the "New User Registration" screen. The top part of the screen will be shown with error messages informing you of data that needs to be corrected or mandatory fields that still need to be filled in.

When the data in all fields are valid and all mandatory fields have been completed, the system will display a "Review Registration Details" screen in which you can review the information you entered in the New User Registration screen. Go to **Section 2.4 – Completion of Registration Process** in the Main Body of the User Guide for an example of the "Review Registration Details" screen. This section also provides the procedure for completing the IACS registration process.
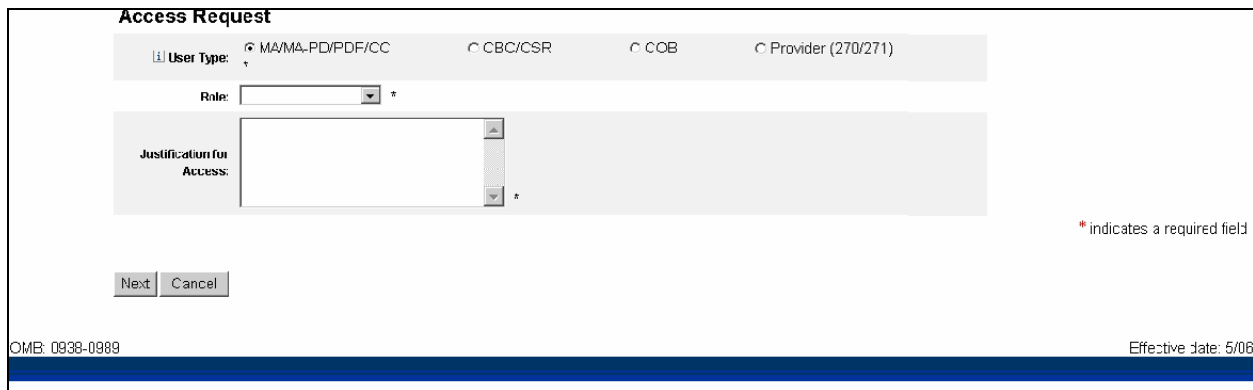
A-1.3   MA/MA-PD/PDP/CC – Approver

Action: In the *Access Request* section, choose *MA/MA-PD/PDP/CC* for *User Type.* (See Figure A-10*)*

Figure A-10: Access Request Portion of the New User Registration Screen

The screen will refresh and display an MA/MA-PD/PDP/CC related Role field as shown in Figure A-11.

Figure A-11: MA/MA-PD/PDP/CC Related Fields

Action: Select Approver from the Role selection drop down list as shown in Figure A-12.

Figure A-12: MA/MA-PD/PDP/CC Role Field

> **Action:**   Enter **Contract Numbers** (example: Hxxxx, 9xxxx, Rxxxx, or Sxxxx) one at a
> time, and click **Add** (See Figure A-13)

Figure A-13: MA/MA-PD/PDP/CC Contract Number Fields

- Contract numbers must be entered one at a time. Click **Add** after each entry.

- Contract numbers will appear after the Contract Number(s) field.

- If you enter an invalid contract number, the screen will refresh and an error message
  will appear near the top of the screen informing you of this and requesting that you
  enter a valid contract number. Scroll down the page to the Contract Number/s field/s
  and enter a valid contract number.

NOTE: Once contract numbers have been added to the registration screen, they cannot be
changed or removed. If you enter an incorrect contract number, you can either cancel your
registration request and do a new request or continue with your current request and inform
your EPOC of the error. Your EPOC can then deny that specific contract access request.

After the Contract Number/s is entered, the screen will refresh as shown in Figure A-14.

Action: Enter a brief statement for the *Justification for Access.* This justification field must include a valid reason for access.

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

Figure A-14: MA/MA-PD/PDP/CC Justification for Access Field for Approver

When you click on *Next*, 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 mandatory fields not filled in, the system will redisplay the "New User Registration" screen. The top part of the screen will be shown with error messages informing you of data that needs to be corrected or mandatory fields that still need to be filled in.

When the data in all fields are valid and all mandatory fields have been completed, the system will display a "Review Registration Details" screen in which you can review the information you entered in the "New User Registration" screen. Go to **Section 2.4 – Completion of Registration Process** in the Main Body of the User Guide for an example of the "Review Registration Details" screen. This section also provides the procedure for completing the IACS registration process.

A-2.0   Modify Account Profile

Occasionally you may want to modify your existing CMS account profile. This can involve adding contract numbers to the list of those to which you already have access. Conversely, you may also delete items from your access listing if you no longer need such access.

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

Action: Browse to https://applications.cms.hhs.gov (See Figure A- 15).

Action: Read the content of the government computer system WARNING/REMINDER screen, and then agree by clicking *Enter CMS Applications Portal.*
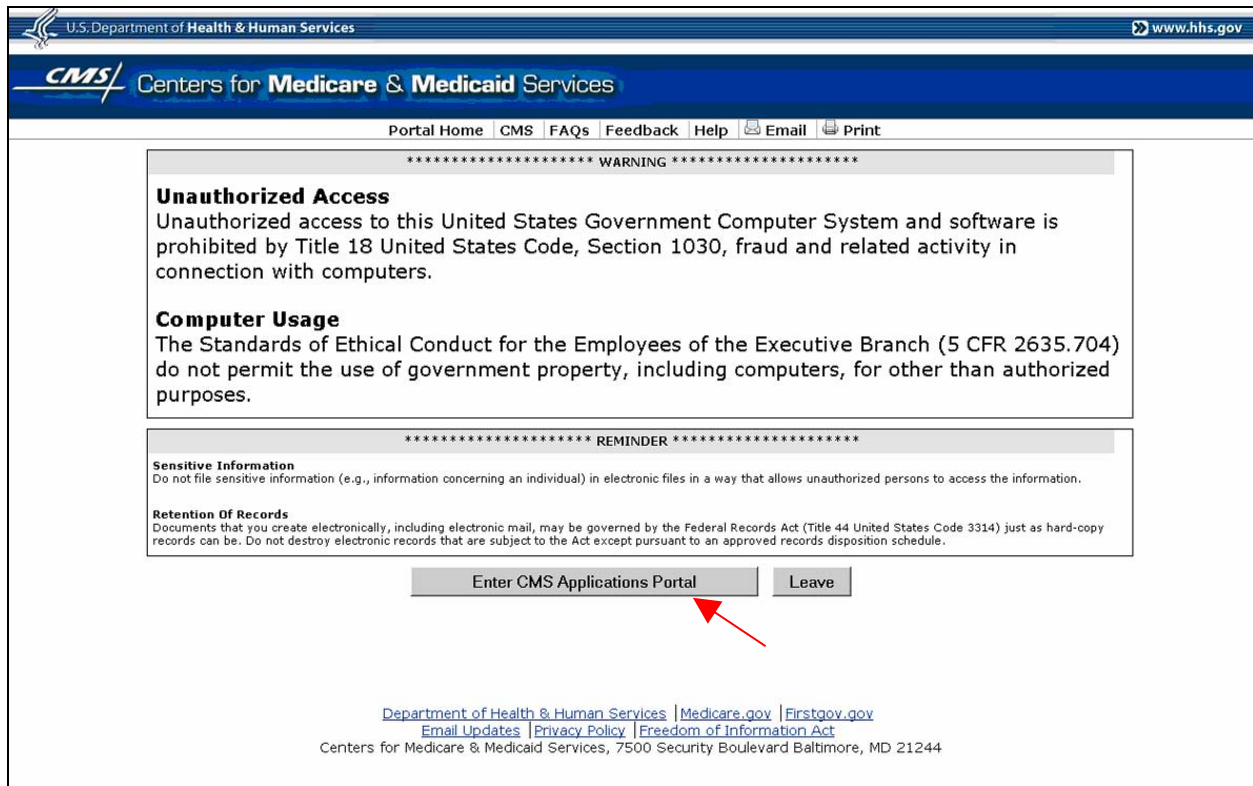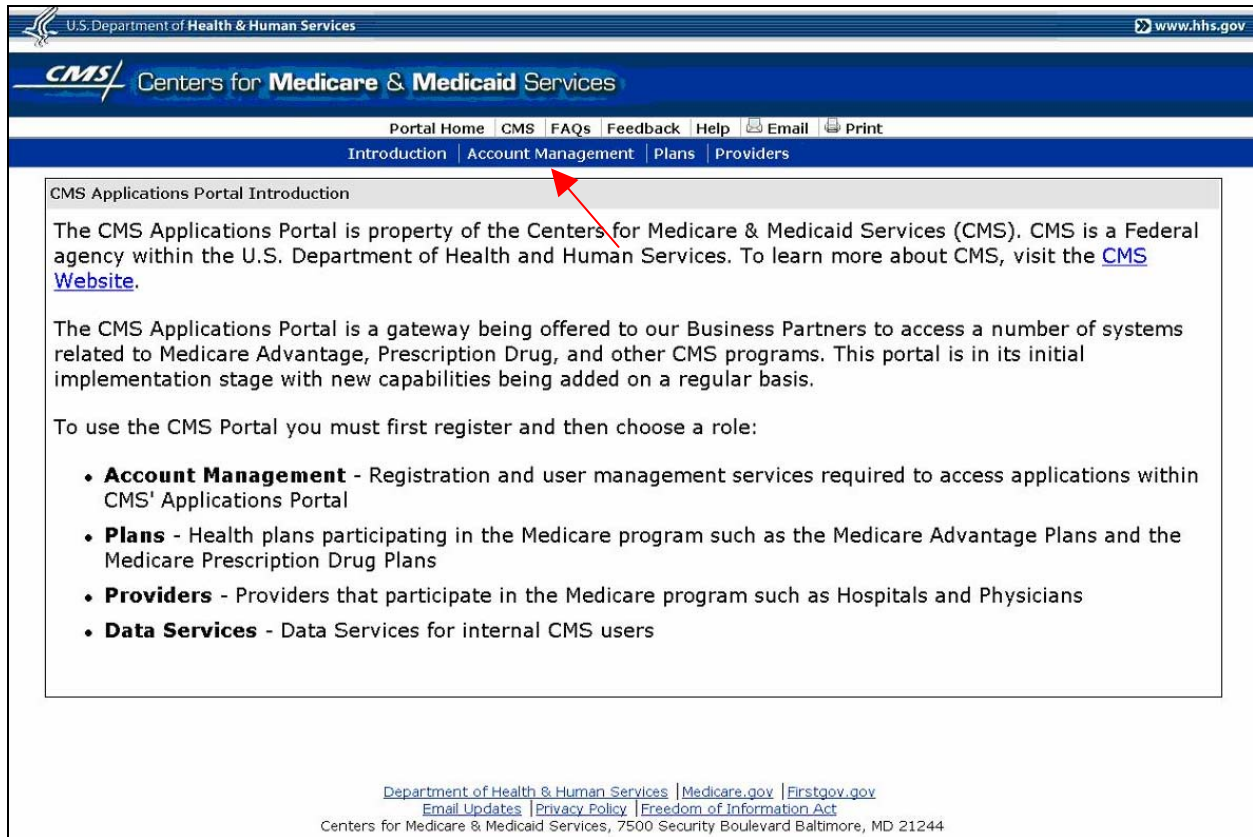
Figure A- 15: Government Computer System Warning/Reminder Screen

If you do not want to proceed any further , you can click on *Leave* to exit.

The "CMS Application Portal Introduction" screen will open as shown in Figure A-16.

Action: Click on *Account Management* in the blue menu bar towards the top of the screen.

Figure A-16: CMS Applications Portal Introduction Screen

The screen will change to the "Account Management" screen shown in Figure A-17.

Action: Click on *My Profile*.

Figure A-17: Account Management Screen

The Login to IACS **screen will open as shown in** (See Figure A-18)

Action: Enter your *User ID*

Action: Enter your *Password* and click *Login.*

Figure A-18: Log In to IACS Screen

A "My Profile" screen will be displayed as shown in Figure A-19.

Action: Select *Modify Account Profile.*

Figure A-19: My Profile – Modify Account Profile Option

A "Modify Account Profile" screen will open. Selected **User Information** fields will be filled in with information you previously provided during the registration process, however the information in these fields cannot be changed. An example of the User Information fields in a "Modify Account Profile" screen is shown in Figure A-20.

Figure A-20. Example of User Information Fields in Modify Account Profile

If you are a User Type of **MA/MA-PD/PDP/CC** and your Role is that of **User/Submitter**, the Access Request portion of the "Modify Account Profile" screen will appear as shown in the example in Figure A-21. The screens for the **User/Representative** role and the **Approver** role will be similar to the one shown in Figure A-21 except the value for the Role field will reflect the different roles. It is not possible to change roles using the Modify Account Profile option. If you must change your role, contact the appropriate Help Desk for assistance.

Figure A-21: IACS Modify Account Profile Screen - MA/MA-PD/PDP/CC

If you want to add a new Contract Number to your current list of Contract Numbers, do the following:

> **Action:**   Enter the ***Contract Number*** and click on ***Add***.

If you want to add another Contract Number, repeat the Action stated above.

If you want to remove one or more Contract Numbers, do the following:

> **Action:**   In the **Modify Contracts/Mailboxes** field areas, within the "Existing Contracts and Selected Contracts" area select the ***Contract Number*** to be removed

> **Action:**   Click on the box with the arrow facing to the right (>)

The system will move the selected Contract Number to the "Contracts to Remove" area on the right. If you change your mind, you can move the Contract Number in the "Contracts to Remove" area back to the "Existing Contracts and Selected Contracts" area by clicking on the box with the arrow facing to the left (<).

If you want to move all Contract Numbers in the "Existing Contracts and Selected Contracts" area to the "Contracts to Remove" area, click on the box with the double arrow facing to the right (>>). If you change your mind, you can move all the Contract Numbers in the

"Contracts to Remove" area back to the "Existing Contracts and Selected Contracts" area by clicking on the box with the double arrow facing to the left (<).

Once you have finished making your modifications, perform the following:

Action: Enter a brief statement for the ***Justification for Access.*** This justification field must include a valid reason for access.

Action: Click on ***Next*** when you are done modifying your registration profile.

When you click on Next, a final registration screen will be displayed as shown in Figure A-22. You must click on the "OK" button to complete the account profile modification process. If you select the "Cancel" button, your account profile modification process will be cancelled and any changes you made to your profile will be lost.
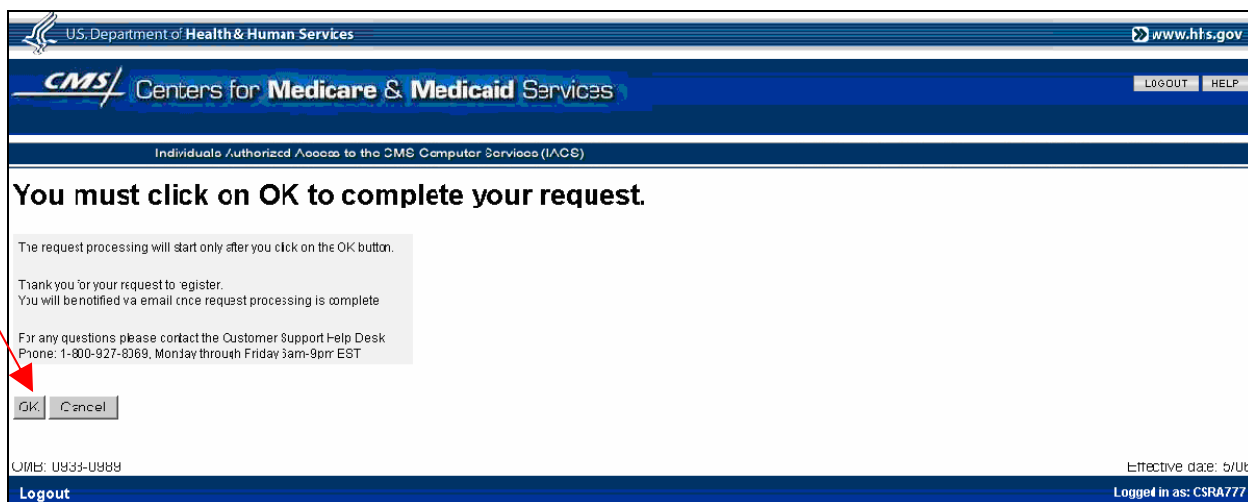
Action: Click on ***OK***.

Figure A-22. Final Modify Account Profile Screen

<u>After Account Profile Modification</u>

You will be sent an email confirming that IACS has received your request and giving you a Request Number. You should use that request number if you contact CMS regarding your request. If an email notification is not received within 24 hours after you register, please contact the applicable Help Desk for your user community.

Your approver will be notified of your pending request via email. You will be notified via email of the approval or denial of your requested modification.

NOTE: Removal of Contracts does not require approval.

A-3.0 Login to MA/MA-PD/PDP/CC Plans

Once you have been approved and provisioned in IACS, you will want to access the screens for the plan/s you will be working on. You will login through IACS and the system will verify and authorize you to access the desired plan. You will then be presented the opening screen for the plan application you are accessing.

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

Action: Browse to https://applications.cms.hhs.gov (See Figure A-23).

Action: Read the contents of the government computer system "WARNING/REMINDER" screen, and then agree by clicking ***Enter CMS Applications Portal.***
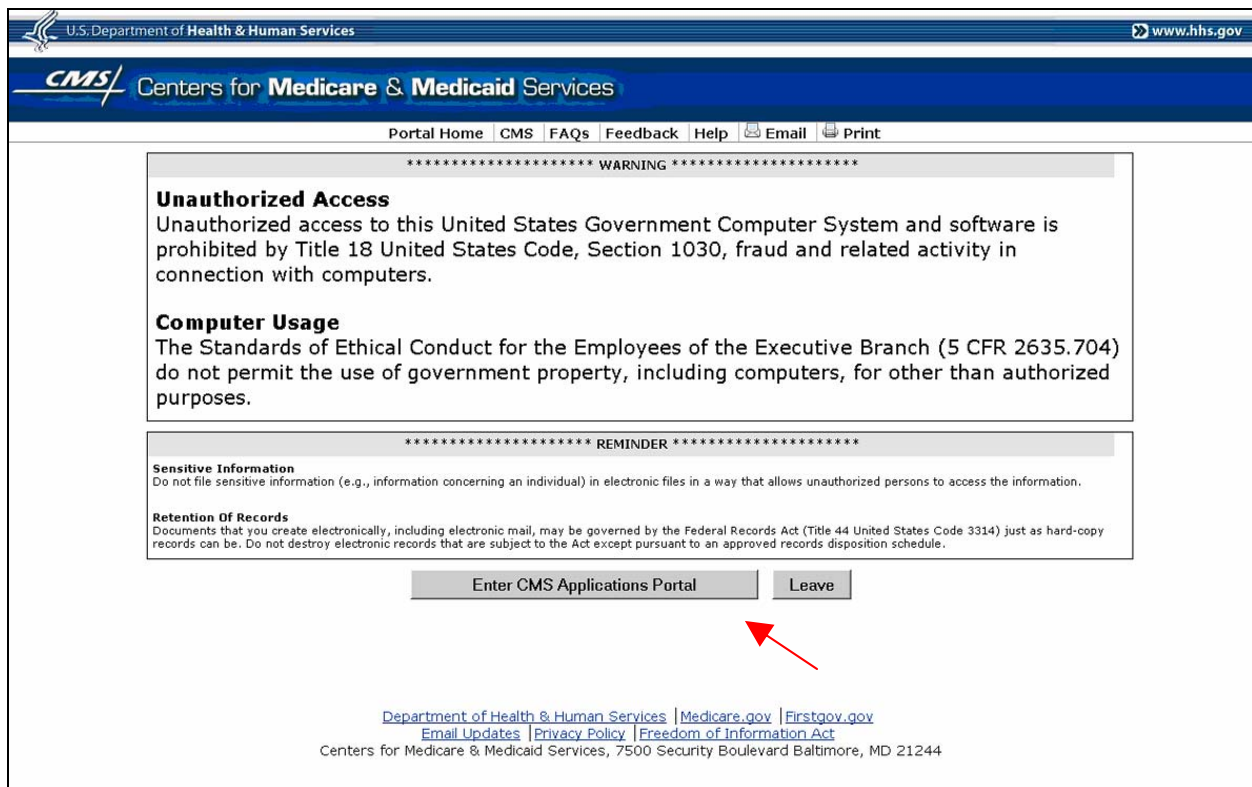
Figure A-23: Government Computer System Warning Screen

If you do not want to proceed any further , you can click on ***Leave*** to exit.

The CMS Application Portal screen will open as shown in Figure A-24.

Action: Click on *Plans* in the blue menu bar towards the top of the screen.
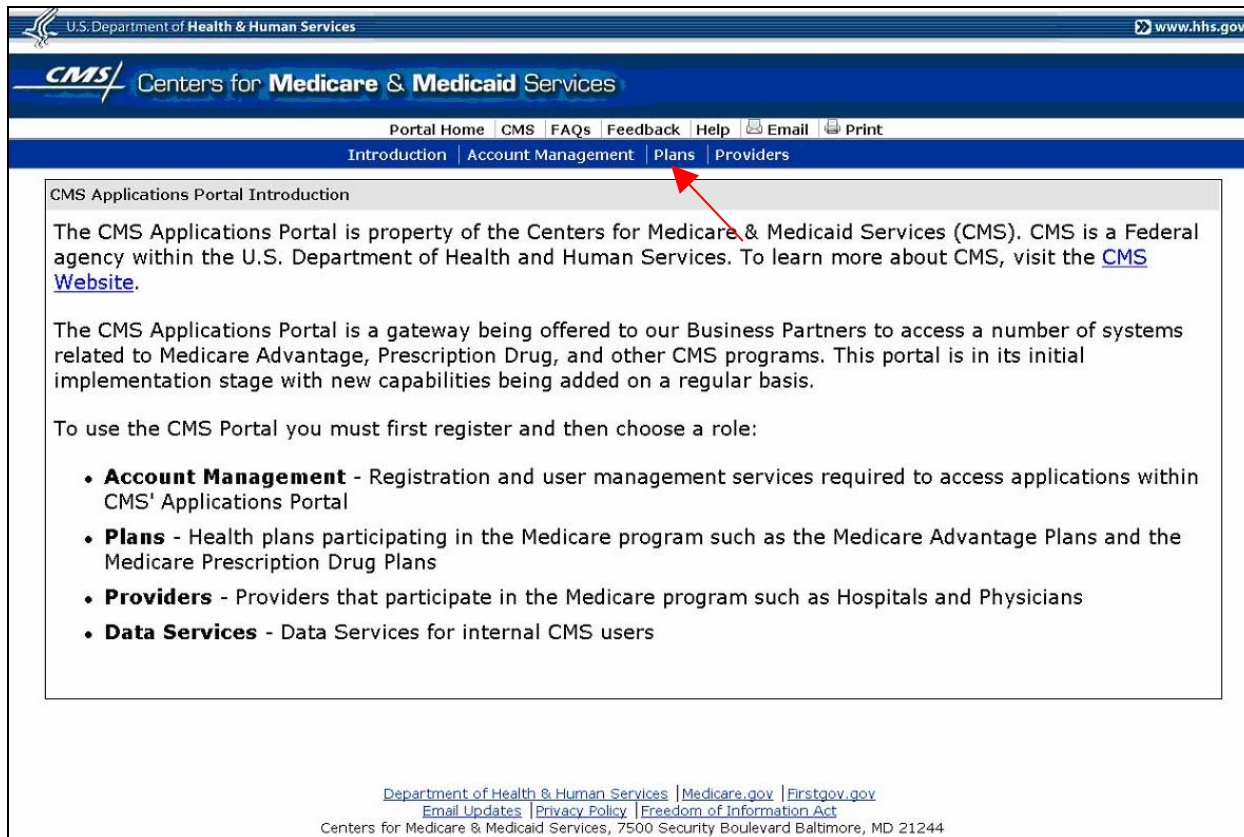

Figure A-24: CMS Applications Portal Introduction Screen

The screen will change to the Plans screen shown in Figure A-25.

Figure A-25: Plans Screen

Action: Click on the link to the plan you want to access: MA Part D or (MBD UI).

The IACS Login screen will be displayed as shown in Figure A-26.

Figure A-26: Login to IACS Screen

When you login with your IACS User ID and Password, the system will verify your identity. The IACS system will notify your plan application software that you are authorized to access the application. The application will then open the first screen for you to begin your work.