

Individuals Authorized Access to CMS Computer Services (IACS)

User Guide – Attachment B

**CBO/CSR – Community Based Organization/Customer
Service Representative**

FINAL

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This attachment provides instructions on completing the “Access Request” portion of the Self-Registration for Community Based Organization/Customer Service Representative (CBO/CSR). This attachment also provides instructions on modifying your account profile.

B-1.0 CBO/CSR Specific Registration Fields

Action: In the **Access Request** section, choose **CBO/CSR** for **User Type**. (See Figure B-1)

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

The screen will refresh and display CBO/CSR related fields as shown in Figure B-2.

Figure B-2: CBO/CSR Related Fields Screen

You can select a role of User or Approver.

B-1.1 CBO/CSR - User

Action: From the drop down list select **User** as your **Role**. (See Figure B-3)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB Provider (270/271)

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-3: CBO/CSR Role Drop Down List

Action: From the Call Center list, select your **Call Center** then click **Add**. (See Figure B-4)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB Provider (270/271)

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-4: CBO/CSR Call Center Drop Down List

The screen refreshes and the selected Call Center is displayed just above the Justification field.

Action: Enter a brief statement for the **Justification for Access**. This justification field must include a valid reason for access. (See Figure B-5)

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

Access Request

MA/MA-PD/PDP/CC * CBO/CSR COB Provider (270/271)

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Call Center(s): 28th Avenue, Phoenix, AZ

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-5: CBO/CSR 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 completed, 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.

B-1.2 CBO/CSR Approver

Action: In the **Access Request** section, choose **CBO/CSR** for **User Type**. (See Figure B-6)

Access Request

MA/MA-PD/PDP/CC * CBO/CSR COB Provider (270/271)

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-6: Access Request Portion of the New User Registration Screen

The screen will refresh and display CBO/CSR related fields as shown in Figure B-7.

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB Provider (270/271)

Role: *

Call Center: 28th Avenue, Phoenix, AZ Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-7: CBO/CSR Related Fields Screen

Action: From the drop down list select **Approver** as your **Role**. (See Figure B-8)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB Provider (270/271)

Role: * **Select Role**

Call Center: User Approver Phoenix, AZ Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-8: CBO/CSR Role Drop Down List

Action: From the drop down list, select your **Call Center** then click **Add**. (See Figure B-9).

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB Provider (270/271)

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-9: CBO/CSR Call Center Drop Down List for Approver

The screen refreshes and the selected Call Center is displayed just above the Justification field.

Action: Enter a brief statement for the **Justification for Access**. This justification field must include a valid reason for access. (See Figure B-10)

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

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB Provider (270/271)

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Call Center(s): 28th Avenue, Phoenix, AZ

Justification for Access:

* indicates a required field

Next Cancel

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Figure B-10: CBO/CSR 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.

B-2.0 Modify Account Profile

Occasionally you may want to modify your existing CMS account profile. This can involve adding call centers 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 B-11).

Action: Read the content of the government computer system WARNING/REMINDER screen, and then agree by clicking **Enter CMS Applications Portal**.



Figure B-11: 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 B-12.

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

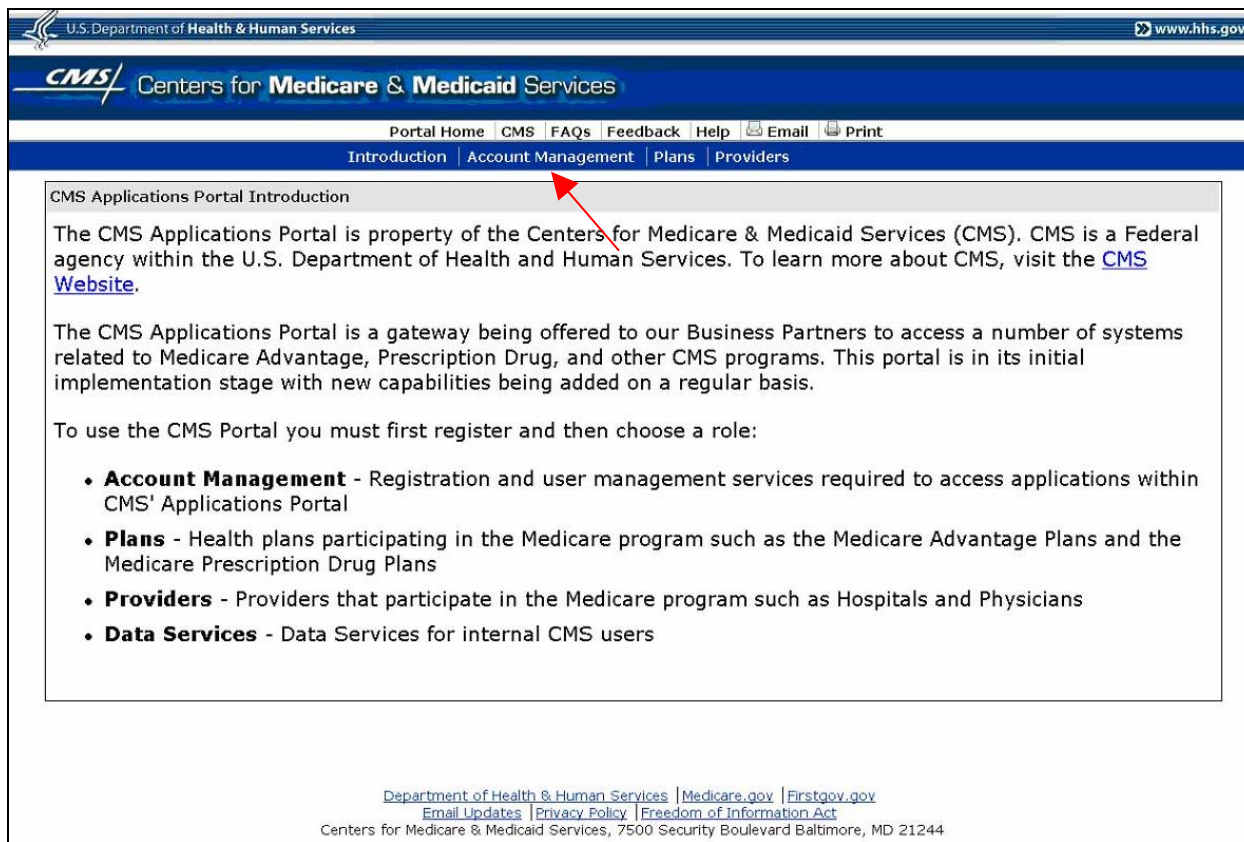


Figure B-12: CMS Applications Portal Introduction Screen

The screen will change to the “Account Management” screen shown in Figure B-13.

Action: Click on **My Profile**.

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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](#)

Help Resources

-Medicare Health Care Providers should direct questions or concerns to the MCARE Help Desk at 1-866-440-3805 (phone), 1-615-238-0822 (fax) or via email MCARE@cms.hhs.gov

-Health Plans should direct questions or concerns to MMAHelp desk at 1-800-927-8069 or via email at mmahelp@cms.hhs.gov

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 B-13: Account Management Screen

The **Login to IACS** screen will open as shown in Figure B-14.

Action: Enter your **User ID**

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

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

Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

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.

User ID:

Password

Figure B-14: Log In to IACS Screen

A **My Profile** screen will be displayed as shown in Figure B-15.

Action: Select **Modify Account Profile**.

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Individuals Authorized Access to the CMS Computer Services (IACS)

My Profile

Welcome, **CSRL111**. Please select one of these options:

- Change Answers to Authentication Questions
- Change Password
- **Modify Account Profile**

[Logout](#) Logged in as: CSRL111

Figure B-15: 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 B-16.

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Individuals Authorized Access to the CMS Computer Services (IACS)

Modify Account Profile

User Information

User ID:

First Name: MI: Last Name:

Email Address:

Office Telephone:

Company Name: Company Telephone:

Address 1: Address 2:

City: State: Zip Code:

Figure B-16. Example of User Information Fields in Modify Account Profile

If you are a User Type of **CBO/CSR** and your Role is that of **User** the Access Request portion of the Modify Account Profile screen will appear as shown in the example in Figure B-17. The screen for the Approver role will be similar to the one shown in Figure B-17 except the value for the Role field will reflect the different role.

User Type: CSR

Role: User

Call Center: 28th Avenue, Phoenix, AZ

Please enter one call center at a time and click the button: Add.

Modify Call Centers:	Existing Call Centers and Selected Call Ce	Call Centers to Remove
	28th Avenue, Phoenix, AZ Corbin, KY Sitel, Savannah, GA	
	> < >> <<	

Justification for Access: *

* indicates a required field

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[Logout](#) Logged in as: GGGG222

Figure B-17: IACS Modify Account Profile Screen – CBO/CSR

If you want to add a new Call Center to your current list of Call Centers, do the following:

Action: Select the **Call Center** and click on **Add**.

If you want to add another Call Center, repeat the Action stated above.

If you want to remove one or more Call Centers, do the following:

Action: In the **Modify Call Center** field area, within the “Existing Call Center” area select the **Call Center** to be removed.

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

The system will move the selected Call Center to the “Call Center to Remove” area on the right. If you change your mind, you can move the Call Center in the “Call Center to Remove” area back to the “Existing Call Center” area by clicking on the box with the arrow facing to the left (<).

If you want to move all Call Centers in the “Existing Call Center” area to the “Call Center 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 Call Centers in the “Call Center to Remove” area back to the “Existing Call Center” 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 B-18. 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**.

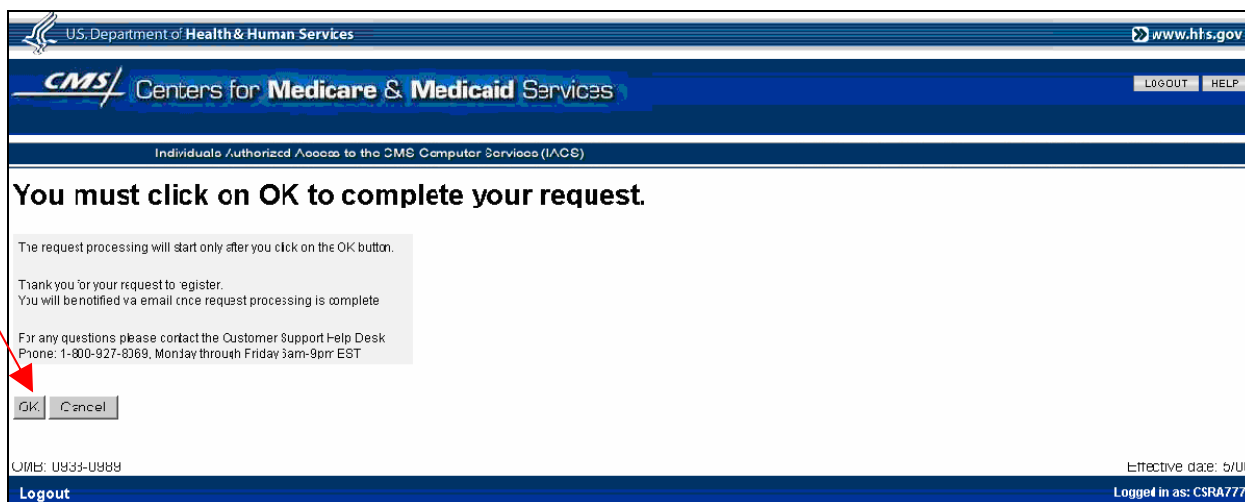


Figure B-18. Final Modify Account Profile Screen

After Account Profile Modification

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 Call Centers does not require approval.