

Individuals Authorized Access to CMS Computer Services (IACS)

User Guide – Attachment C

COB – Coordination of Benefits

FINAL

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This attachment provides instructions on completing the “Access Request” portion of the Self-Registration for Coordination of Benefits (CBO). This attachment also provides instructions on modifying your account profile.

C-1.0 COB Specific Registration Fields

Action: In the *Access Request* section, choose **COB** for *User Type*. (See Figure C-1)

The screenshot shows the 'Access Request' section of a user registration screen. At the top, there are four radio button options for 'User Type': 'MA/MA-PD/PDP/CC', 'CBO/CSR', 'COB', and 'Provider (270/271)'. A red arrow points to the 'COB' option, which is selected. Below this is a text area labeled 'Justification for Access:'. At the bottom left are 'Next' and 'Cancel' buttons. The footer contains 'OMB: 0938-3989' and 'Effective date: 5/06'. A note on the right states '* indicates a required field'.

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

The screen will refresh and display COB related fields as shown in Figure C-2.

The screenshot shows the 'Access Request' section after selecting 'COB'. A new 'Role' dropdown menu is visible, highlighted with a red arrow. The 'Justification for Access' text area remains. The 'Next' and 'Cancel' buttons are at the bottom left. The footer shows 'OMB: 0938-0989' and 'Effective date: 5/06'. A note on the right states '* indicates a required field'.

Figure C-2: COB Related Field

C-1.1 COB – User/Transmitter

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

Figure C-3: COB Role Drop Down List

After the user role is selected, the screen will refresh and additional COB related fields will be displayed as shown in Figure C-4.

Action: From the **Organization Identifier** drop down list, select either **Coordination of Benefits Agreement (COBA)** or **Voluntary Data Sharing Agreement (VDSA)**. (See Figure C-4)

Figure C-4: COB Organization Identifier Drop Down List

Action: Enter **Organization Numbers** one at a time, and click **Add** (See Figure C-5)

Access Request

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

Role: User/Transmitter *

Organization Identifier: Coordination of Benefits Agreement (COBA) *

Organization Number:

Please enter one Organization Number at a time and click the Add button.

Justification for Access: *

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure C-5: COB Organization Number Fields

After the Organization Number/s is entered, the screen will refresh and display the entered Organization Number/s as shown in Figure C-6.

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

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: User/Transmitter *

Organization Identifier: Coordination of Benefits Agreement (COBA) *

Organization Number:

Please enter one Organization Number at a time and click the Add button.

OrganizationNumber/s: 12345

Justification for Access: *

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure C-6: COB Justification for Access Field

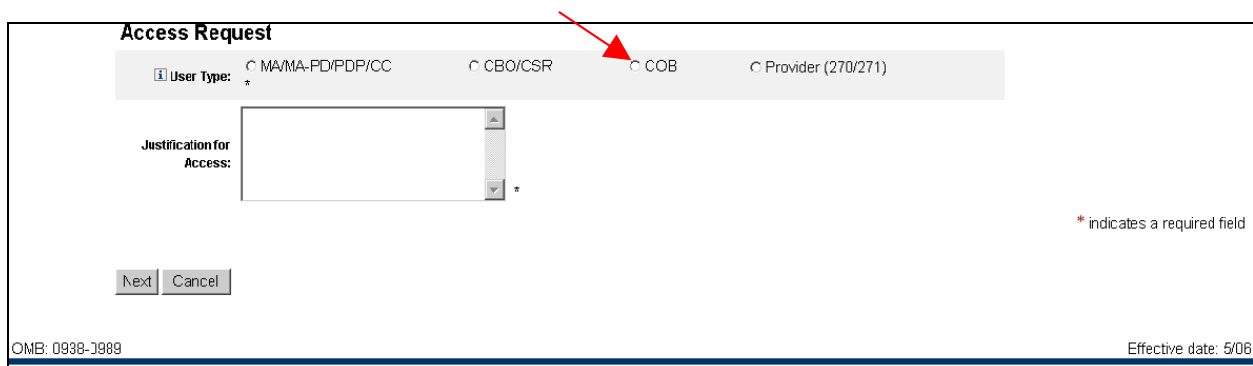
When you click on **Next**, the system will validate the data you have entered in each of the fields on the New User Registration screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the New User Registration screen.

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.

C-1.2 COB – Approver

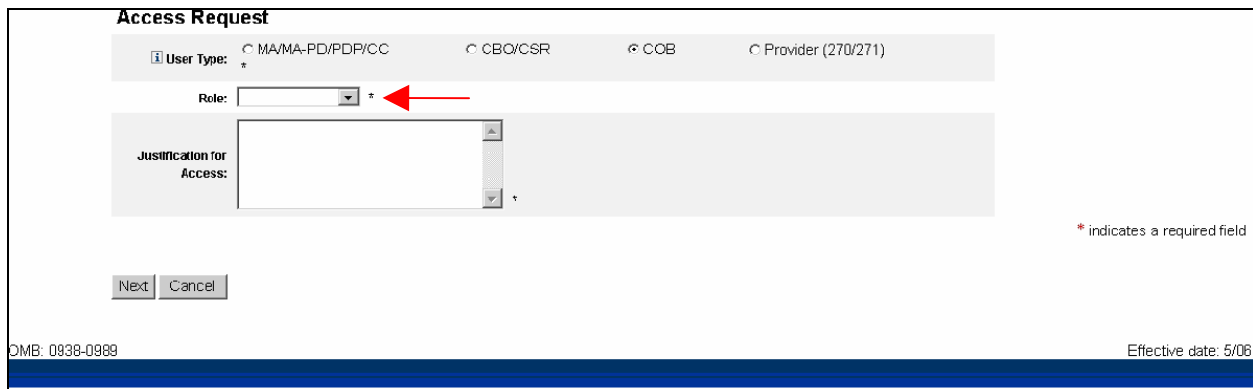
Action: In the **Access Request** section, choose **COB** for **User Type**. (See Figure C-7)



The screenshot shows the 'Access Request' form. At the top, there is a 'User Type' section with four radio button options: 'MA/MA-PD/PDP/CC', 'CBO/CSR', 'COB', and 'Provider (270/271)'. A red arrow points to the 'COB' option, which is selected. Below this is a 'Justification for Access:' text area. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, a note states '* indicates a required field'. The footer contains 'OMB: 0938-0989' and 'Effective date: 5/06'.

Figure C-7: Access Request Portion of the New User Registration Screen

The screen will refresh and display COB related fields as shown in Figure C-8.



The screenshot shows the 'Access Request' form after selection. The 'User Type' section now has 'COB' selected. A new 'Role:' dropdown menu has appeared, with a red arrow pointing to it. The 'Justification for Access:' text area is still present. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, a note states '* indicates a required field'. The footer contains 'OMB: 0938-0989' and 'Effective date: 5/06'.

Figure C-8: COB Related Field

Action: From the drop down list select **Approver** as your **Role**. (See Figure C-9)

Access Request

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

Role: *

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure C-9: COB Role Drop Down List

After the Approver role is selected, the screen will refresh and will be displayed as shown in Figure C-10.

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.

Access Request

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

Role: Approver *

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure C-10: COB 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.

C-2.0 Modify Account Profile

Occasionally you may want to modify your existing CMS account profile. This can involve adding organization 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 C-11).

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

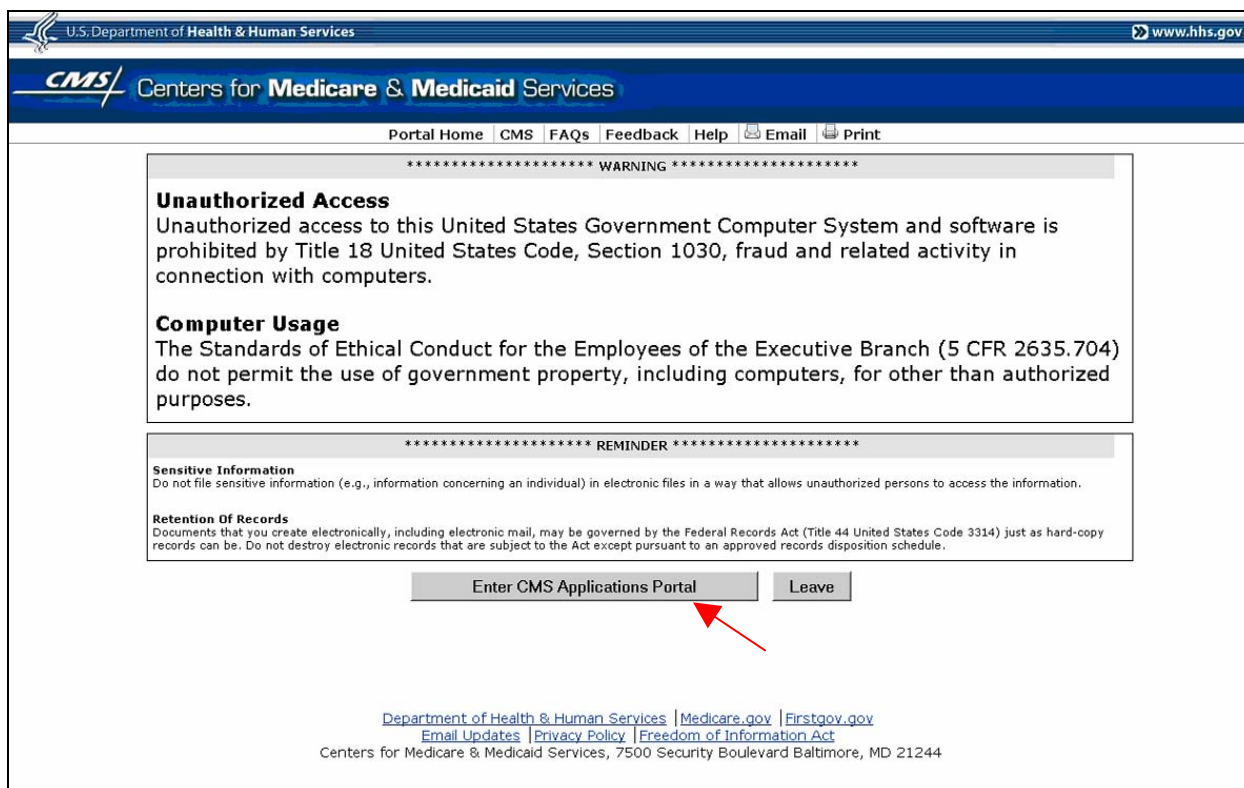
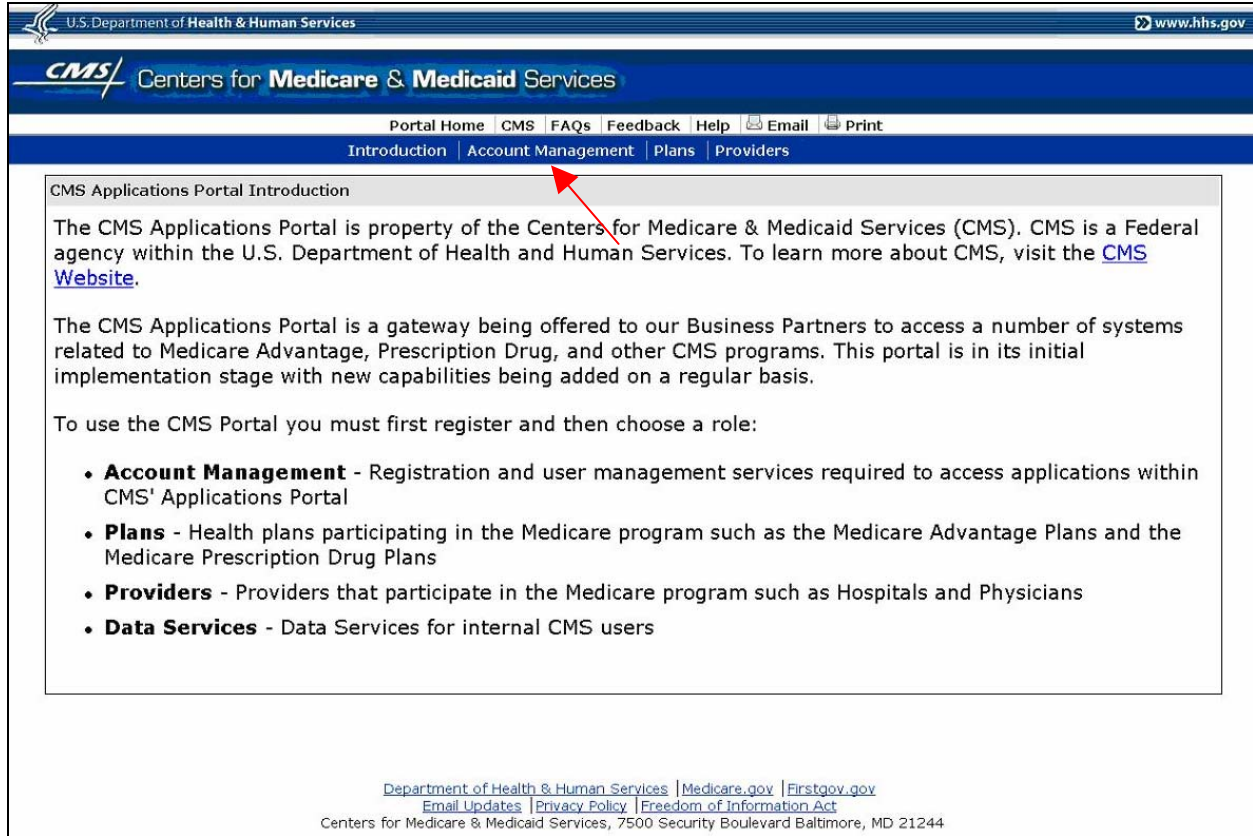


Figure C-11: Government Computer System Warning/Reminder Screen

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 C-12.

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



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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:

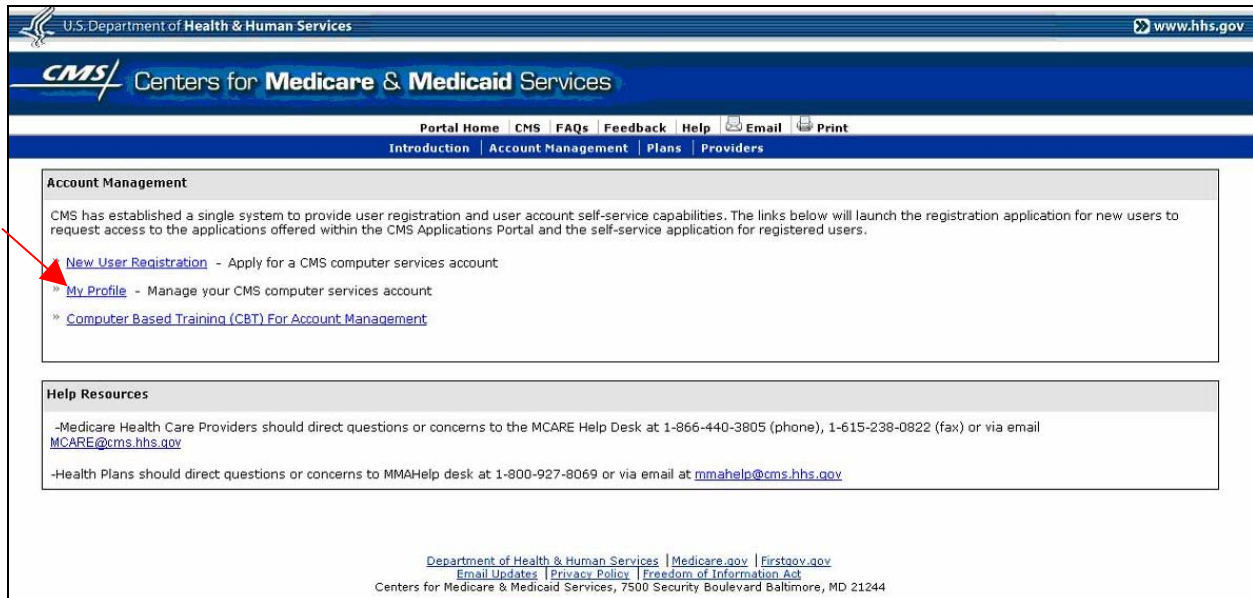
- **Account Management** - Registration and user management services required to access applications within CMS' Applications Portal
- **Plans** - Health plans participating in the Medicare program such as the Medicare Advantage Plans and the Medicare Prescription Drug Plans
- **Providers** - Providers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

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 Centers for Medicare & Medicaid Services, 7500 Security Boulevard Baltimore, MD 21244

Figure C-12: CMS Applications Portal Introduction Screen

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

Action: Click on *My Profile*.



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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 C-13: Account Management Screen

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

Action: Enter your **User ID**

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

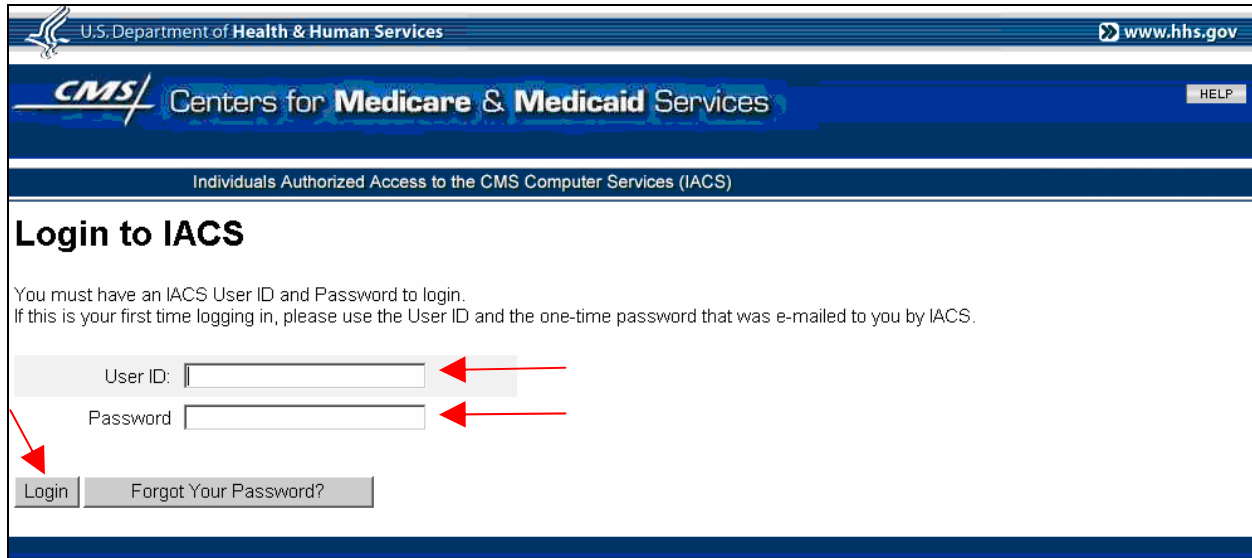


Figure C-14: Log In to IACS Screen

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

Action: Select **Modify Account Profile**.

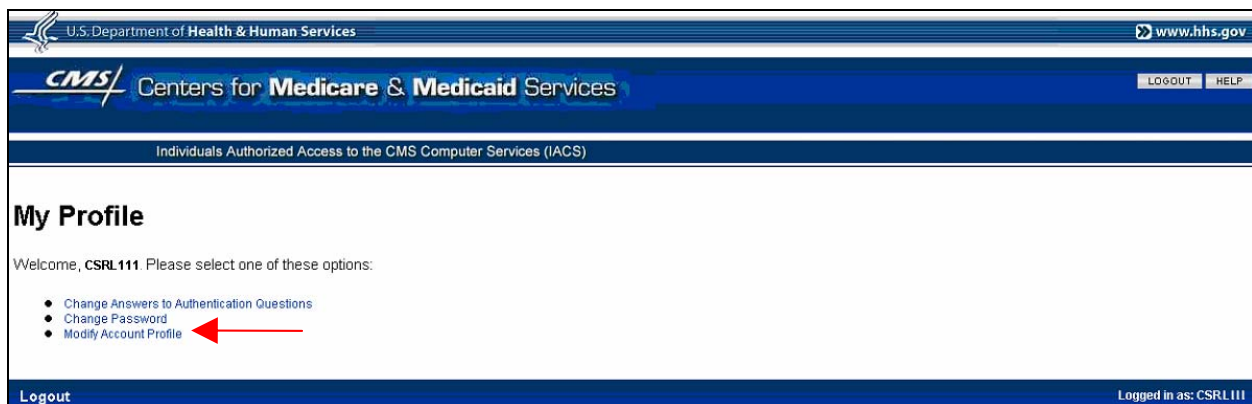


Figure C-15: My Profile – Modify Account Profile Option

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 C-16.

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

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

Figure C-17: IACS Modify Account Profile Screen - COB

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

Action: Enter the **Organization Number** and click on **Add**.

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

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

Action: In the **Modify Organization Numbers** field area, within the “Existing Organization Numbers” area select the **Organization Number** to be removed.

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

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

If you want to move all Organization Numbers in the “Existing Organization Numbers” area to the “Organization Numbers 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 Organization Numbers in the “Organization Numbers to Remove” area back to the “Existing Organization Numbers” 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 C-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**.

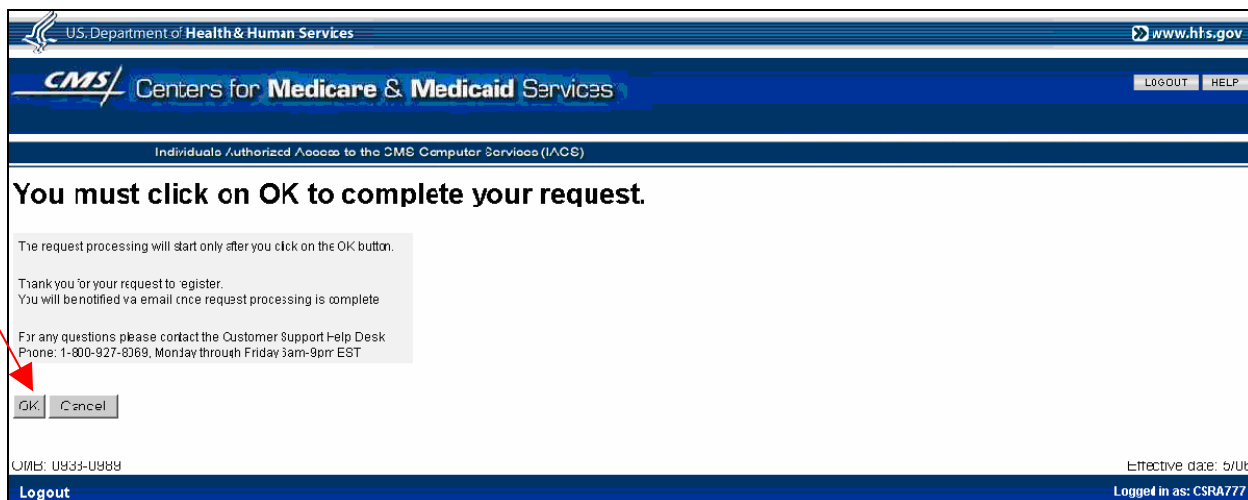


Figure C-18. Final Modify Account Profile Screen

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 COBA/VDSA Organization Numbers does not require approval.