Instructions for Requesting Access to the
Health Plan Management System (HPMS) Part D IPM Module

This document provides instructions for requesting and maintaining access to the Health Plan Management System (HPMS) Part D Improper Payment Measure (Part D IPM) module. The first section details how to request access to the module for those without current HPMS access. The second section is for current HPMS users seeking access to the Part D IPM module. In both cases and particularly for new users of HPMS, please begin this process as soon as possible. The third section refers to managing HPMS Part D IPM user access. The fourth section describes the recertification and password maintenance process.

Note: Please direct all HPMS access requests to the HPMS Access Team at hpms_access@cms.hhs.gov.

Requesting HPMS Part D IPM Module Access for a New User

If the user does **not** have an active CMS user ID with access to HPMS, the user must follow these steps to obtain a CMS user ID:

Register in EFI – Prior to starting this process, please add the following email addresses to your email address book and/or safe senders list to ensure delivery: EUA@cms.hhs.gov and ESS@cms.hhs.gov.

1. Open your web browser and enter the Enterprise User Administration (EUA) Front-End Interface (EFI) URL: https://eua.cms.gov/efi.

   o **Note:** This site is best viewed with Google Chrome v69+ or Microsoft Edge v83+.

2. Select the **Register** button.

3. Enter your personal details in the respective boxes. Create your own username and password.

   o **Notes: (1)** Both the username and password are case sensitive. The password must be 8 to 24 characters long, include at least one uppercase letter, contain at least one special character (e.g., @, !, %), and contain at least one number. **(2)** If you already have a 4-character CMS user ID, do NOT complete another request. Contact an HPMS team member and request the additional access needed. **(3)** The email address you use in the EFI must be the same email address you will use in your HPMS user account.

4. Select the **Sign Up** tab and log out.

5. Upon receipt of an automated email from EUA, select the **Activate EFI Account** link.

6. Enter the username and password you created during the EFI registration process in the appropriate fields, then select the **Login** tab.

7. On the Warning screen, select the **Agree** tab to continue.

8. Select the **Access** menu, then select **New User Request**, which will take you to the User Details section.

9. In that section, select **Business Partner** from the **Category** field.

10. Select **HPMS** from the **Type** field.

      o **Note**: Failure to select the **HPMS** option will result in your request being routed through the wrong workflow, which **will** delay the creation of your user ID.

11. In the **Request Justification** field, indicate that the user needs Part D IPM module access.

12. Select **Personal Details** and enter the required information.

      o **Note**: Enter your Social Security number (SSN) with the dashes included (i.e., xxx-xx-xxxx).

13. Select **Contact Details** and enter the required information.

14. Select **Additional Details** and enter the required information. The **CMS Region/Facility** will be automatically filled out for you.

15. Under the "I am a" question, select **Direct Plan Employee** if you are a direct employee of the organization you are requesting access to in HPMS; otherwise, pick the correct consultant type.

16. Begin typing your company name into the **Company Name** field in the Additional Details section of EFI. After the fourth letter, pause, and the dropdown menu should display. Select your company name from the Company Name dropdown menu.

      o If your company name is **not** in the dropdown menu, you must send an email to the HPMS Help Desk (HPMS@cms.hhs.gov) with the subject line: "EFI." The body of this email should include the company name to be added and the contract number this request is for. Once CMS adds the new company name, the name will appear in EFI in this dropdown menu.

      o If your company name must be added to the system, select **Save Request** at this point. You can log back in to EFI and finish the request by entering your company name and contract number(s) and then continue with Step 17.

17. Enter the contract number that you need access to in HPMS in the **Plan Number(s)** field.

18. Select **Submit Request**. You will then receive an on-screen message stating that the submission was successful. You will also receive an automated confirmation email from EFI. If you choose to save your request, you can log back in to EFI and modify the request details at a later time.

Your user ID request will not be processed without completing these steps.

Requesting HPMS Part D IPM Module Access for an Existing HPMS User

If the user has an active CMS user ID with access to HPMS but requires access to the Part D IPM module, the user must:

- Send an email to the HPMS Mailbox (hpms_access@cms.hhs.gov) that includes the user ID and a request to add Part D IPM module access.

- Please do **not** resubmit the user request form described above.

- Ensure that you recertify and complete the Computer-Based Training (CBT) for your CMS user ID when notified by CMS via email (eua@cms.hhs.gov). If you do not complete the certification or CBT in a timely manner, your CMS user ID will be revoked and you will ultimately have to reapply as a new HPMS user. For more information about recertification, please see below.

In accordance with the HPMS Rules of Behavior, the sharing of CMS user IDs is **strictly prohibited**. If CMS determines that individuals are sharing a user ID, the user ID will be revoked immediately.

Managing HPMS User Access

Ultimately, it is the responsibility of the sponsoring organization to manage and maintain the set of users for which they have authorized access to HPMS. This general principle applies to both plan staff members and any consultants who are serving as agents of the sponsoring organization.

CMS provides organizations with reports in HPMS that they can use to manage user access to their contract number(s). These reports can be viewed under the **User Resources > User Access Administration** link in HPMS. If a user within a sponsoring organization does not currently have access to the plan user access reports, the organization must submit a request for such access to hpms_access@cms.hhs.gov.

Part D sponsors also have access to the Contract Submitter Summary Report within the Part D IPM module to assist in determining whether changes to submitters are needed. This report displays a listing of a Part D sponsor's users who have access to make submissions for the sample. Users that already have access can download the Contract Submitter Summary Report from the **Reports** tab within the Part D IPM module. Full instructions for accessing the report

are available in the *Health Plan Management System Part D Improper Payment Measure (IPM) Module User Guide.* Part D sponsors can download the guide from the **Documentation** link on the left side of the screen within the Part D IPM module.

Sponsoring organizations may request the removal of a user's access to their data in HPMS at any time. These requests should be sent to hpms_access@cms.hhs.gov. Requests must contain the user ID and name of the individual to be removed from HPMS access.

In the case of consultant users, it is important to remember that these individuals may serve multiple organizations. When requesting the removal of a consultant, please ensure that you clearly identify the individual as a consultant and request the removal of the individual's access to **only** your specific contract number(s). Failure to provide this level of detail may result in the deletion of a consultant's CMS user ID, rather than simply the consultant's access to your contract number(s).

Recertification and Password Maintenance

Annual Recertification Process

CMS user IDs must be recertified electronically on an annual basis using CMS' EUA system at https://eua.cms.gov. If you do not complete the recertification in a timely manner, your CMS user ID will be revoked and you will have to reapply as a new user.

Upon receipt of a recertification email notice from eua@cms.hhs.gov, you must complete both Step 1 and Step 2:

Step 1: System Access Review

- Log in to the EUA System Access Certification page at https://eua.cms.gov/eurekify/portal/login using your HPMS credentials.

- If you find a certification item on your home screen, select the **Certify** button to proceed.

- Select the checkbox that appears next to your name. This action will automatically select the checkboxes for all of your associated job codes.

- Select the **Keep** button to retain access to the selected job codes.

- On the summary page, select the **Submit** button to continue.

- On the confirmation pop-up window, select the **X** that appears in the upper right-hand corner to complete the system access review step.

- See Step 3: Checking Your Status below for instructions how to view the System Access Certification (SAC) Recertification (Recert) Status. If the SAC Recert Status is:

- **OK:** You have completed the system access review step successfully. The SAC Recert Completion Date should reflect the day you completed your system access review, and the SAC Recert Due Date should reflect the following year.

- **Pending:** You have completed the system access review, but it is pending CMS approval.

- **Due:** Please repeat each of the items in Step 1: System Access Review above. Upon completion, your system access review will be sent to CMS for approval.

Step 2: Security Training

- Access the CMS security CBT (Information Systems Security and Privacy Awareness Training) at the following URL: https://www.cms.gov/cbt/login/.

- Log in using your CMS credentials and complete the training.

- Once complete, print a copy of your certificate for your records, as it may be needed later in the process.

  - Please note that you may need to log in a second time in order to generate your certificate. Your CBT is not considered complete until you obtain the certificate.

  - Please note that your CBT status will be updated overnight, not immediately.

- See Step 3: Checking Your Status below for instructions on how to view the CBT Recert Status. If your CBT Recert Status is:

  - **OK:** You have completed the CBT and no further action is required on this step. The CBT Completion Date should reflect the day you completed your CBT, and the CBT Recert Due Date should reflect the following year.

  - **Due:** You have your certification, and the CBT status remains unchanged. Send a copy of your CBT certificate to CBT@cms.hhs.gov and request that CMS update your CBT status manually in EUA.

Step 3: Checking Your Status

You can check your SAC and security CBT status in the EUA at any time.

- Log in to EUA at https://eua.cms.gov using your HPMS credentials.

- Select the **View IDs I Manage** link in the left-hand navigation bar.

- On the search page, select **User ID** equals "enter your 4-digit CMS user ID here" and select the **Search** button.

- Make sure the record is selected in the table that appears and choose the **Select** button.

If the SAC Recert Status is **OK**, the SAC Recert Completion Date has changed to the day you completed your system access review, and the SAC Recert Due Date has changed to the following year, indicating you have completed the system access review step successfully.

For additional information, please visit: https://www.cms.gov/Research-Statistics-Data-and-Systems/Computer-Data-and-Systems/HPMS/RecertAndPwdProcess.html.

For assistance with EUA, the security CBT, and passwords, please contact the **CMS IT Service Desk at 1-800-562-1963 or 410-786-2580**.