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**DATE:** April 22, 2011

**TO:** All Current and Prospective Medicare Advantage, Prescription Drug Plan, Cost, PACE, and Demonstration Organizations and Bid Consultants

**FROM:** Cynthia G. Tudor, Ph.D., Director  
Medicare Drug Benefit and C & D Data Group

**SUBJECT:** Instructions for Obtaining Bid Consultant Access in the Health Plan Management System (HPMS) for Contract Year (CY) 2012

Beginning with CY 2012, HPMS will identify third-party bid consultant users separate and apart from bid submission staff employed directly by the contracting organization. For the purposes of this memo, a bid consultant is defined as an individual that prepares and/or submits plan bids on behalf of an organization, yet that individual is not a direct employee of the organization.

Designated bid consultants must have active HPMS access and provide official letters from each organization granting permission to access its contract number(s) in HPMS. HPMS access for bid consultants is limited to the preparation and submission of plan bids and related reports.

This memo provides the instructions for requesting and obtaining HPMS access for bid consultants.

**Bid Staff Employed by Contracting Organizations and Actuarial Consultants**

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These instructions do **not** apply to bid staff directly employed by the contracting organization. These staff should follow the standard instructions for requesting access to HPMS.

In addition, the new bid consultant profile does **not** contain any actuarial certification functionality. Actuarial certification consultants must follow the HPMS access instructions provided in the March 3, 2011 memo entitled "Instructions for Obtaining Actuarial Certification Access in the Health Plan Management System (HPMS) for Contract Year (CY) 2012."

Please note that it is possible for a third-party consultant to be assigned to more than one user profile in HPMS, depending upon the responsibilities assigned to the consultant by

the contracting organization. Consultants must follow the instructions outlined in the applicable memos (e.g., formulary consultant memo, bid consultant memo, actuarial certification consultant memo) to obtain access to HPMS.

### Submitting a Request for a New HPMS User – Bid Consultants

If the bid consultant does **not** have active access to HPMS and is submitting a plan bid on behalf of an organization, the user should follow these steps:

- Download the *Application for Access to CMS Computer Systems* form from <http://www.cms.hhs.gov/InformationSecurity/Downloads/EUAaccessform.pdf>.
- Complete the form as follows:
  - Section 1 – Check “New” as the type of request.
  - Section 2 – Check “Medicare Advantage / Medicare Advantage with Prescription Drug / Prescription Drug Plan / Cost Contracts – Using HPMS Only” and complete the data entry fields, where applicable.
  - Section 3 – Enter the contract number(s) for which you will be submitting bids for CY 2012.
  - Section 4 – Check the first row beneath the "Default Non-CMS Employee" row (i.e., place a check in the Connect box of the third row). On the blank line beside your check mark, write "HPMS\_P\_CommUser".
  - Section 5 – State briefly that you require HPMS access to submit plan bids on behalf of an organization. **You must indicate that you are under contract as a bid consultant with the contracting organization(s).**
  - Section 6 – Leave blank.
  - Sign and date the Privacy Act Statement on page 3 of the form. Also enter your name and Social Security Number at the top of page 3. This step is critical to ensuring the successful processing of your request.

In addition to the *Application for Access to CMS Computer Systems* form, the bid consultant user **must include an official letter from each organization for which the consultant is under contract to submit a plan bid via HPMS.** This letter must clearly indicate that the individual will be serving as a bid consultant on behalf of the contracting organization and specify the contract number(s) required for this purpose. In addition, the letter must be provided on the organization’s official letterhead and signed by a senior official of the sponsoring organization. This letter must also have an original hardcopy signature. Faxed and emailed copies will not be accepted.

**NOTE:** If the bid consultant is contracted with multiple organizations, only one CMS user access form is required, but **a letter must be provided from each organization for which the bid consultant will be serving as an agent in HPMS.** At least one letter from a sponsoring organization must be included in your submission in order for your request for HPMS access to be processed. Please note that you are permitted to submit additional letters from other sponsoring organizations following your initial submission for HPMS access.

CMS recommends the use of the following sample language in the letter from the sponsoring organization:

*(Name of Organization)* hereby requests that *(Name of Bid Consultant)* with the firm of *(Name of Consulting Firm)* requires HPMS access to upload bid submissions on our behalf. *(Name of Bid Consultant)* requires access to the following contract number(s): *(list specific contract numbers)*.

*(Name of Bid Consultant)* requires the following HPMS access (please check the box):

- Bid Consultant Profile (i.e., bid download and upload, applicable formulary reports and plan benefit reports)

#### Submitting a Request for an Existing HPMS User – Bid Consultants

If the bid consultant already has access to HPMS, but must be moved to the new bid consultant profile, the following steps should be taken:

- Please do NOT resubmit the user request form.
- Recertify your CMS User ID, when notified by CMS. Users will receive an email notification from [ess@cms.hhs.gov](mailto:ess@cms.hhs.gov) with the subject “*CMS Certification Due Date.*” Please follow these instructions closely to ensure you recertify and retain your current user ID. If you do not complete the certification in a timely manner, your CMS User ID will be **revoked** and you will have to re-apply as a new HPMS user.
- Submit an official letter from each organization for which you are under contract to submit plan bids via HPMS. Prior to the start of each annual bid season, bid consultant users **MUST** submit new letters to ensure they have access to submit plan bids on behalf of their contracting organizations for the upcoming contract year.
- In addition to adhering to the recommended letter language outlined above, the official letter(s) for an existing HPMS user **must** include the user ID and an explanation that this user already has HPMS access.

#### Common Mistakes on the Application for Access to CMS Computer Systems Form

Please be aware of the following common mistakes when preparing your request for HPMS access:

- You must include the contract number(s) in Section 3 for which you will be serving as a bid consultant.
- You must always provide a Social Security Number. CMS will **not** process a request without this piece of information.
- You must complete the form in ink, not pencil.
- You must submit the original hardcopy form with an original signature and date.  
**Photocopies and faxes are unacceptable.**

## Managing Bid Consultant User Access

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Ultimately, it is the responsibility of the contracting organization to manage and maintain the set of users for whom they have requested access to the HPMS. This general principle applies to both plan staff and any consultants that are serving as agents of the contracting organization.

CMS provides organizations with reports in HPMS that can be used to manage user access to your contract number(s). To obtain access to the “plan user access” reports, contracting organizations must submit a request to [hpms\\_access@cms.hhs.gov](mailto:hpms_access@cms.hhs.gov).

Contracting organizations may request the removal of a user from accessing their data in HPMS at any time. These requests should be sent to [hpms\\_access@cms.hhs.gov](mailto:hpms_access@cms.hhs.gov). Requests must contain the user ID and name of the individual to be removed from HPMS.

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

## How to Submit Your Access Request – Bid Consultants

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Please submit the original (not a copy) user access form and the corresponding organization letter(s), when required, via traceable carrier to:

Ms. Lucia Patrone  
Re: Bid Consultant HPMS Access  
7500 Security Blvd.  
Location: C4-18-26 / Mailstop: C4-18-13  
Baltimore, MD 21244-1850

For questions regarding these instructions as they pertain to HPMS access and the bid consultant process, please contact Lucia Patrone at 410-786-8621 or [lucia.patrone@cms.hhs.gov](mailto:lucia.patrone@cms.hhs.gov) or Sara Silver at 410-786-3330 or [sara.silver@cms.hhs.gov](mailto:sara.silver@cms.hhs.gov).