

Medicare Managed Care Manual

Chapter 20 - Plan Communications Guide

Section 7 - M+C Organization Access to the Plan Information Control System

(Rev. 40, 11-14-03)

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7.1 - Introduction

(Rev. 40, 11-14-03)

This section contains instructions for M+C organizations to update their contact and address information. It is the responsibility of each M+C organization to keep this data current to ensure receipt of CMS policy and procedure documents.

The “Group Health Plan (GHP), Plan Information Control System (PICS), Plan Access User Manual” includes instructions and procedures for accessing the PICS for viewing and updating selected data. It is intended for use by staff members of the Plans who are responsible for the data as well as the staff members of the CMS Central and Regional offices.

The PICS contains all contract and plan information that was gathered during the contract application process. This information includes the title, names, addresses, telephone/fax numbers etc., for each of the officials/contact persons within the managed care organization.

The information is used when mailing reports, letters and other information to the appropriate contact personnel.

NOTE: The information housed in this system must be kept up to date to ensure that the managed care plan receives important information such as policy changes. **The CMS is no longer going to be responsible for updating this information. Each Plan now is responsible for updating this information.**

7.1.1 - Purpose of this Document

(Rev. 40, 11-14-03)

The purpose of the “Group Health Plan (GHP), Plan Information Control System (PICS), Plan Access User Manual” is to explain the processes and procedures required to add, update and monitor the Plan personnel/address information in the PICS

7.1.2 - System Security

(Rev. 40, 11-14-03)

To use this system, you must:

- Have a valid User ID and Password for the CMS Data Center (HDC) mainframe;
- Be an authorized user of the PICS; and
- Be approved to make changes to one or more specific contract numbers.

The contract number must be a valid contract number in the PICS. A User with authority to update a contract number may perform only certain functions and change only certain information on that contract. A User will only be able to change data for their own organization.

7.1.3 - Accessing the System

(Rev. 40, 11-14-03)

To access the PICS, you must first have a valid **User ID** and **Password** for the HDC mainframe computer, and you must also have access to the PICS. (It should be understood that in order to preserve the integrity of the system, passwords must be kept confidential.) To receive the HDC User ID and password, fill out the "Application for Access to CMS Computer Systems" form. This form can be obtained by calling your CO contact (refer to [Appendix H](#)).

See [sections 1 and 2](#), and [3](#) for information about how to establish communications with the HDC Mainframe.

7.1.4 - Logging On

(Rev. 40, 11-14-03)

Your first communication with the CMS computer occurs when you log on to the HDC. Because the HDC Logon screen is subject to change, you are given two sets of instructions. Choose which directions to follow according to the initial screen or prompt you receive after making a connection.

7.1.5 - Logging Onto the HDC Main Menu

(Rev. 40, 11-14-03)

These instructions assume that you have established connection with the CMS mainframe. When the CMS logo screen is displayed press <ENTER> to display the “Application Menu” screen.

1. From the Applications Menu, to use the PICS you want to access “Model204 Version 2 Production.” Currently, the option is **5**. Type in **5** and press **Enter**. The “M204PRD2 SIGNON” screen will be displayed.

```
----- M204PRD2 SIGNON -----  
  
ENTER LOGON PARAMETERS BELOW:  
  
USERID    ==>  XXXX  
PASSWORD  ==>                               NEW PASSWORD ==>  
ACCT NMBR ==>  XXXXXXXXXXXX  
APPLICATION =>  
  
PF3 - to exit
```

This is the “M204PRD2 SIGNON” screen. It requires that you have a valid User ID, Password, and Account Number in order to access the application. If you do not have this information, you will be **denied** access to the system. Call your CO contact (see [Appendix H](#)) to obtain access.

There are five fields on this screen where data can be entered. They are: USERID, PASSWORD, ACCT NMBR, APPLICATION, and NEW PASSWORD.

2. At the **USERID** == > field, type in your 4-digit **User ID**. Use the **Tab** to go to the next field.
3. At the **PASSWORD** ==> field, type in your **password**. This is your 6-8 digit system password. (For security reasons your password will not display.) If this is your first time using your **password** on the system, you will immediately be prompted to change your password. Do that by typing in a **new** password (at least six characters but no more than

eight characters in length) in the space provided. The system will then prompt you to repeat your new password. Re-type your new password, and press **Enter**

NOTE: Every 60 days, you are required to change your password. However, you may change your password at any time by typing a new password in the **NEW PASSWORD ==>** field, and pressing **Enter**. Retype the new password for verification. Your new password may not be a password that you used previously.

4. Use **Tab** to go to next field. **NOTE:** Use **Shift** and **Tab** to go to the previous field.
5. At the **ACCT NMBR ==>** field, type in your group's **11 character account number** and press **Enter**. (Your account number will have a format similar to XYZXYZ12345). (See your manager for account number information.)
6. At the **APPLICATION ==>** field, type in **PICS** for the application and press **Enter**. The "Change Plan Data" screen will be displayed.

NOTE: At this point, if you do not have access to the PICS **production** version, your logon attempt will be rejected by the system. Call your CO contact (see [Appendix H](#)) for assistance.

7. If you press **Enter** at any point before all of the required information is entered, the system will prompt you to enter the missing information.

If you do not know the **acronym** for the application, as indicated in step **6** above, press **Enter** to display the “Model 204 Region M204PRD2” screen.

```
PAGE 1/1                               Model 204 Region M204PRD2                               S0
NEWS   Maintenance to M204 Test regions 5/21/00                               05/16/00
-----
      1  CL                ACTIVE      MODEL 204 COMMAND LINE
      2  BROWSE            ACTIVE      Browse Sequential Files
      3  MCCOY             ACTIVE      GHP Beneficiary Information
      4  PICS              ACTIVE      GHP Plan Information Control System
      5  SIRPRO            ACTIVE      ULSPF M204 Procedure Editor

      SELECT APPLICATION > 4
-----
PF1=HELP   PF2=INFO   PF3=LOGOFF  PF4=MULT REG   PF12=NEWS
```

This screen is used to access the various applications. If you do not see the application listed on this screen, then you do **not** have access to it. For example, if you have access to MCCOY and PICS you will see the above screen.

If the system status message beside “GHP PICS” indicates **INACTIVE**, you will not be able to access it at this time. Call your CO contact (see [Appendix H](#)) for assistance.

NOTE: At this point, if you do not have access to the PICS **production** version, your logon attempt will be rejected by the system. Call your CO contact (see [Appendix H](#)) for assistance.

8. If the system status message indicates **ACTIVE**, at the **SELECT APPLICATION ==>** field, type the **number** for GHP PICS (in this screen, it is number **2**), and press **Enter**. The “Change Plan Data” screen will be displayed as shown on the following page.

NOTE: The screens on your PC will indicate that you select **F** keys to perform the various functions. However if your PC/terminal only has **F** keys, then if the screen function indicates **PF1**, press the **F1** key on your PC/terminal, **PF2** press **F2**, etc.

9. Use **F3 = EXIT** to return to the previous screen, and/or exit the system.

7.2 - Change Plan Data

(Rev. 40, 11-14-03)

The first screen to be displayed after accessing *a* the PICS is the “Change Plan Data” screen. This screen is used to add, modify and update the names, addresses, telephone numbers, fax numbers, etc., for the officials/contact persons within the Plan’s organization.

```
PICS                                CHANGE PLAN DATA                                1.1

                                     PAGE 1 - PERSONNEL
                                     2 - ADDRESSES
                                     3 - EMAIL
                                     4 - FAX

                                     ENTER PAGE ==> 1

                                     ENTER CONTRACT # ==> _____

                                     * * * * PICS  PRODUCTION DATA * * * * *
==> _____ PF1=HELP  PF3=END
```

The Change Plan Data screen consists of four pages. They are:

- Page 1 - Personnel - used to add, modify or update personnel information
 - Page 2 - Addresses - used to add, modify or update address information
 - Page 3 - E-mail - used to add, modify or update E-mail address information
 - Page 4 - Fax - used to add, modify or update fax number information
1. To use this screen, use the **Tab** key to position the cursor in the **ENTER PAGE ==>** field, and type in the option (page) that you wish to access.
 2. Then type in the **Contract Number** for the Plan whose data you are going to update, and press **Enter**. The first page of the option that you selected will be displayed. The Contract Number is **five-digits** consisting of the letter **H** or **9** and **4 numbers**.

NOTE: If you do not know the contract number, leave the field blank and press **Enter**. A screen will be displayed listing the plan numbers of those plans you are allowed to update. You will be allowed to select one or more plan numbers. The following is a sample of that screen.

```

P1/1                                SELECT ONE PLAN WITH AN 'X'                                1.1
SEL  PIC #  TYPE  PLAN NAME                                STATUS
_   A12345  CMP   GET WELL PHYSICIANS' SERVICES ORLANDO MARK  ACTV
_   B12345  HMO   GEORGE=S MEDICAL PLAN, INC-NORTHEAST FLA MARK  ACTV
_   C12345  HMO   MICKEY=S MEDICAL PLAN, INC-ORLANDO MARKET      ACTV
_   D12345  HMO   MINNIE=S MEDICAL PLAN, INC-SOUTH FLORIDA MARK  ACTV
_   E12345  HMO   GOOFY=S MEDICAL PLAN, INC-TAMPA MARKET        ACTV

==> _____ PF1=HELP  PF2=SELECT  PF3=QUIT  PF7=UP  PF8=DOWN  PF12=MAIN MENU

```

There are five fields on this screen:

Field	Description
SEL	This field is used to place an X beside the Plan you want to select.
PIC #	This is the 6-digit Plan Information Control number that is assigned to every Plan.
TYPE	This field is used to indicate the type of Plan it is.
PLAN NAME	This is the name of the Plan.
STATUS	This field is used to indicate whether the Plan is ACTV (active) or RVKD (revoked).

- Use the **Tab** key to scroll through the list of Plan numbers, position the cursor beside the one that is to be selected, type **X** and press **F2**. The page you selected on the Plan Data screen will be displayed. If you do not see the plan number you want to update, press **F8** to go to the next page of Plan numbers.

7.2.1 - Page 1 - Plan Personnel

(Rev. 40, 11-14-03)

The first option on the “Change Plan Data” screen is “Page 1 - Personnel.” This screen is used to add, modify or update a Plan’s officials/contact personnel list. This screen will allow the person’s title, name, address, telephone, e-mail, and fax information to be entered and saved to the system.

1. To access this option, press **1** from the Change Plan Data screen, enter a Contract Number and press **Enter**. The “Page 1 - Plan Personnel” screen will be displayed.

```
PICS                PAGE 1 - PLAN PERSONNEL                1.1.1
PLAN NAME: SEAWAY MEDICAL SERVICES                PIC#: A12345
REGIONAL NAME: LOS ANGELES BASIN                FILE ROOM#:
                                                USE TITLE:
MR/MS/MRS/DR: MS_                A12345                1 2 _ 4 _ _ _ _ _
FIRST NAME: ABBY_____
LAST NAME: JACKSON_____
PHONE: 999-999-9999                FAX: _____
UPDATED: 11/17/1999 JONES, LUCY
MR/MS/MRS/DR: MS_                A12345                _ _ 3 _ _ _ _ _
FIRST NAME: ABBY_____
LAST NAME: JACKSON_____
PHONE: 999-999-9999                FAX: _____
UPDATED: 08/03/1999 DOESON, JANE
MR/MS/MRS/DR: MR_                A12345                _ _ _ _ 5 _ _ _ _
FIRST NAME: DONOVAN_____
LAST NAME: AYERS_____
PHONE: 999-999-9999                FAX: _____
UPDATED: 10/05/1999 DOESON, JANE
TITLES: 1-CEO 2-NONE 3-MDCR 4-FIN 5-SYS 6-BENE 7-MKT 8-OTHER 9-CORP
CURRENT VIEW
==> _____ PF1=HELP                PF2=UPDATE PF3=END                PF5=PAGE+
                PF10=UP                PF11=DOWN                PF12=MAIN MENU
```

This screen displays the demographic data for the personnel at the Plan. It will display the name of the Plan, the region it belongs to, the PIC number and the File Room number. This is system generated information that cannot be changed in this process. If any of this information is incorrect, contact your CMS Plan manager.

This screen also displays the titles, name, telephone, and fax information for the contact personnel for the Plan. This information can be updated and changed whenever it is necessary. This screen displays the name of the last person who updated this information, and the date that the update occurred.

There are seven Function keys that can be used from the screens in this process. If a Function key is not displayed on the screen, then it cannot be used from that screen.

Function Key	Description
F1 = Help	Press this key to obtain information about the screen or the process.
F2 = Update	Press this key to update the record and save it to the system.
F3 = End	Press this key to exit the current screen and return to the previous screen.
F4 = Page-	Press this key to go back to the Plan Personnel page.
F5 = Page+	Press this key to go to the Plan Addresses page.
F10 = Up	Press this key to page up to the previous screen of personnel contacts.
F11 = Down	Press this key to page down to the next screen of personnel contacts.
F12 = Main Menu	Press this key to return to the Change Plan Data Menu.

NOTE: If you are updating a record, make sure that the old data has been deleted from the record. You may do this by positioning the cursor in the field, and typing over the old information with the new information, or you may use the Spacebar to erase the old information. After removing all information, press F2 to update the record.

2. When the Page 1 - Plan Personnel screen is displayed, the cursor will be in the MR/MS/MRS/DR field. Type in the **title** for the person (Mr, Ms, Mrs, Dr). Do not use periods after the title. If this is the only field where data is to be changed, then press **F2** to update the record. If this is not the only field where data needs to be changed, then use the **Tab** key to position the cursor in the next field.
3. The next field where data is to be entered is the USE TITLE field. The USE TITLE codes at the bottom of the screen refer to the area in which that person is a Plan contact. This field has 9 positions where the title information for the personnel can be entered. The *Use Titles* designate the job title/category of the individual whose data is being entered/updated. The nine job titles/categories are:
 - 1 - CEO; 2 - SITE; 3 - MDCR (Medicare); 4 - FIN (Financial); 5 - SYS (System);
 - 6 - BENE (Beneficiary); 7 - MKT (Marketing); 8 - OTHER; 9 - CORP (Corporate).
4. To enter data in this field, use the **Tab** key to put the cursor in the position which corresponds to the job title/category, and type in the **number** of that job title/category.

For example, if the job title/category of the individual is CEO, then type a **1** in the first position of the Use Title field; if the job title/category of the individual is FIN, then type a **4** in the fourth position of the Use Title field, etc. More than one job title/category can be entered for a person, but a Use Title code can only be used once per Plan.

NOTE: The CEO and SITE personnel/address may not be removed from the system. All other personnel/addresses can be removed.

If your organization is a regional component, and if the CEO and SITE personnel/address is not different from your parent organization, you may use the parent organization information. If the CEO and SITE personnel/address is different, please enter this information on the screen.

If a contact has a '2' in the *USE TITLE* field, you will not be able to update this entry. Contact your CO plan manager to have this information changed.

5. The next field is used to enter the person's FIRST NAME. Type in the first name. Then use the **Tab** key to go to the next field.
6. The next field is used to enter the person's LAST NAME. Type in the last name, and use the Tab key to go to the next field. Remember, if you are updating this record, make sure that you delete all of the old information, press **F2**, and type in the new information, or you may type over the old information with the new information and press **F2** to update.
7. The next field is for the area code and telephone of the person. This is a 10 character field. The phone number is entered as XXX-XXX-XXXX. Include the hyphens, but do not use slashes or parentheses.
8. The next field is for the fax number of the person. This is a 10 character field which is used to enter the area code and telephone of the fax. The phone number is entered as XXX-XXX-XXXX. Include the hyphens, but do not use slashes or parentheses.
9. The next field is the UPDATED field. This field will contain the name of the last person who updated this record and the date it was done. This field is generated automatically by the system when the record is updated, and can not be changed.
10. When all of the fields for the person have been completed, press **F2** to update the record. A message will be displayed that the data was updated.
11. If you do not see the personnel information you need to change, press **F11** to go to the next page.
12. If you need to add new personnel information, enter the information in the first empty block. If the first page is filled with information, press **F11** to find the first available empty block to type in your information.
13. The **F5** key will take you to the address screens which is described in the next section.

7.2.2 - Page 2 - Plan Addresses

(Rev. 40, 11-14-03)

The “Page 2 - Plan Addresses” screen is used to enter address information for the Plan. This screen is used for entering mailing address information into the system, and for indicating which mailing address will be used by the personnel. More than one title (i.e., 1-CEO, 2-SITE, etc.) can be entered for an address. There are two ways to access this screen.

1. This option can be accessed from the “Change Plan Data” screen by selecting option **2 - ADDRESSES**, entering the **Contract number** and pressing **Enter**, or, by pressing **F5** from the “Page 1 - Plan Personnel” screen.

```
PICS                                PAGE 2 - PLAN ADDRESSES                                1.1.2
PLAN NAME: JOE'S PLACE                PIC#: P00817
REGIONAL NAME: LOS ANGELES BASIN      FILE ROOM#:
STR1: ONE JOE'S PLAZA_____          P00817  1  _ _ _ _ _
STR2: 10TH FLOOR_____
CITY: OAKLAND_____                STATE: CA
ZIP: 94612_____
EMAIL: _____
UPDATED: 01/20/2000  MANCINI, JEFF M

STR1: P.O. BOX 12345_____          P00817  _ 2 3 _ 5 _ _ _ _
STR2: _____
CITY: OAKLAND_____                STATE: CA
ZIP: 94612-2916
EMAIL: _____
UPDATED: 01/20/2000  MANCINI, JEFF M
USES: 1-DIR/CEO  2-SITE  3-MDCR  4-FIN  5-SYS  6-BENE  7-MKT  8-OTHER  9-CORP
      NOT AUTHORIZED TO CHANGE USE CODES: 2
==> _____  PF1=HELP      PF2=UPDATE  PF3=END    PF4=PAGE-
                        PF10=UP    PF11=DOWN   PF12=MAIN MENU
```

2. When the screen is displayed the cursor will be in the STR1 field. This field is used to enter the mailing address of the Plan. Type in the mailing address and then use the **Tab** key to move the cursor to the next field. If no additional information is required for this record, press **F2** to update and save this data.
3. The Use Address For field is used to designate which address will be used for the official/contact person(s). This field will permit the title/category to be entered for the individual whose address is being referenced. Each “Use Address” code can only be used **once** per Plan.
4. Use the **F11** key to page down the Plan Addresses list. When the desired address has been found, use the **Tab** key to position the cursor in the space that coincides with the person’s job title/category that was entered on the “Page 1 - Personnel” screen. Type in the **number** of

that person's job title/category in the position that coincides with the number of the job title/category. The job title/categories are:

1 - CEO; 2 - SITE; 3 - MDCR (Medicare); 4 - FIN (Financial); 5 - SYS (System);
6 - BENE (Beneficiary); 7 - MKT (Marketing); 8 - OTHER; 9 - CORP (Corporate).

For example, in the screen capture on the previous page, the Managed Care Organization Joe's Place has two addresses - One Joe's Plaza, Oakland, CA 94612, and P. O. Box 12345, Oakland, CA 94612-2916. Mr. John Doe is the CEO of Joe's Place, and his mailing address is One Joe's Plaza, Oakland, CA 94612. So a **1** is typed in the first position of the Use Address For field to indicate that the mailing address for the CEO of Joe's Place is One Joe's Plaza, Oakland, CA 94612.

Using the same screen example, the Site information and Medicare information use the P. O. Box 12345, Oakland, CA 94612-2916 address. That information is indicated by the **2** and **3** being shown in the second and third positions for the P. O. Box 12345, Oakland, CA 94612-2916 address. If no additional information is required for this record, press **F2** to update and save this data.

5. The next field on the screen is "STR2" which is the second mailing address field. This field is used to add additional street address information, such as the suite number, building number, etc. Type in the additional street address information, and then use the **Tab** key to move the cursor to the next field. If no additional information is required for this record, press **F2** to update and save this data.
6. The next fields are for entering the city, state and zip code. This is required information. Use the **Tab** key to move the cursor to the next field. If no additional information is required for this record, press **F2** to update and save this data.

NOTE: If the address on the screen has a '2' in the Use Address For field, you will not be able to update this entry. Contact your CO plan manager to have this information changed.

7. The last field on this screen is to enter the "E-MAIL" address. Type in the e-mail address. If no additional information is required for this record, press **F2** to update and save this data.
8. When all of the required information has been entered, press **F2** to update the record and save it to the system.
9. Pressing **F4** will page you back to the personnel page to allow you to make changes to the personnel.

7.2.3 - E-Mail

(Rev. 40, 11-14-03)

The e-mail option is used to enter a contractor's e-mail addresses into the system. To access this option press **3** on the Change Plan Data screen, type in the **Contract Number** and press **Enter**.

NOTE: If you do not know the contract number, leave the field blank and press **Enter**. A screen will be displayed listing the plan numbers of those plans you are allowed to update. You will be allowed to select one or more plan numbers.

The "Page 2 - Plan Addresses" screen will be displayed. **Or**, you may press **F5** from the "Page 1 - Plan Personnel" screen, and the "Page 2 - Plan Addresses" screen will be displayed, where the e-mail information can be entered.

NOTE: Please refer to [§7.2.2](#) for additional instructions on using this screen.

7.2.4 - Fax

(Rev. 40, 11-14-03)

The Fax option is used to enter a contractor's fax number into the system. To access this option press **4** on the "Change Plan Data" screen, type in the **Contract Number** and press **Enter**.

NOTE: If you do not know the contract number, leave the field blank and press **Enter**. A screen will be displayed listing the plan numbers of those plans you are allowed to update. You will be allowed to select one or more plan numbers.

The "Page 1 - Plan Personnel" screen will be displayed where the Fax number information can be entered. **Or**, you may press **F4** from the "Page 2 - Plan Addresses" screen, and the "Page 1 - Plan Personnel" screen will be displayed where the fax information can be entered.

NOTE: Please refer to [§7.2.1](#) for instructions on using the "Page 1 - Plan Personnel" screen.