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# Individuals Authorized Access to CMS Computer Services (IACS) Provider User Guide for User/Providers

Software Release 4.2.2

Document Version 1.0

**April 2007**

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Document No.: 1988  
Contract No.: 500-02-0036  
Task Order No.: 0003

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## 1.0 Introduction

### 1.1 Purpose

This document establishes the procedures for registering and provisioning end-users who are defined as User/Providers, using the Individuals Authorized Access to CMS Computer Services (IACS) application within the Centers for Medicare & Medicaid Services (CMS). Registration procedures for Security Officials, User/Approvers, and MEIC Help Desk Users are described in additional role-specific documents.

### 1.2 Roles and Responsibilities

The following entities have responsibilities related to the implementation of this user guide:

**User** – The term ‘user’ is used throughout this document to refer to all IACS users regardless of their role including end-users, approvers or EPOCs, and personnel filling other roles particular to a specific application.

**End-User** – An end-user is a person who requires access to a CMS application to perform assigned work tasks. End-users include employees within various CMS organizations as well as their authorized subcontractor end-users. A user may only be put into a user role; a user may not be put into an approver role.

**Approver** - An approver is an external point of contact (EPOC), or a call center supervisor. Approvers are responsible for approving end-user access requests to CMS applications. Because approvers are the sole points of contact for authorizing their end-users, it is strongly recommended that this approver be in a position of authority within an organization, e.g., management official, compliance officer, etc.

### 1.3 How to Use this document

When an action is required on the part of the reader, it is indicated by a line beginning with the word “Action:” For example:

**Action:** Click on ***OK***.

The field or button to be acted upon is indicated in ***bold italics*** in the **Action** statement.

## 2.0 Registration for CMS Application Access

The following sub-sections provide step-by-step instructions on how to apply for access to CMS applications using the New User Registration procedures.

### 2.1 Accessing IACS for Self-Registration

The following steps and screens show you how to access the web link that allows you to self register in IACS.

**Action:** Browse to <https://applications.cms.hhs.gov> (See Figure 1).

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



**Figure 1: Government Computer System Warning/Reminder Screen**

**Action:** 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 2.

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

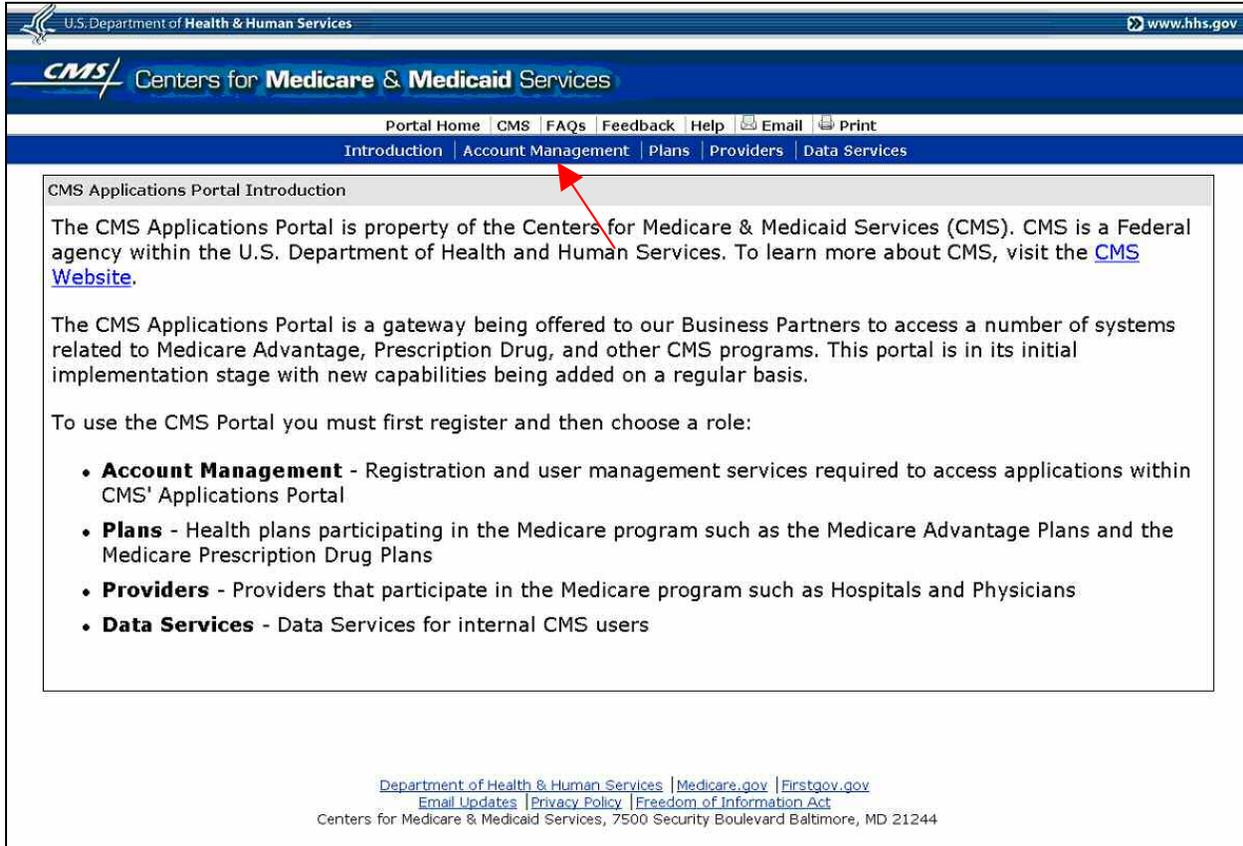


Figure 2: CMS Application Portal Introduction Screen

The screen will change to the screen shown in Figure 3.

**Action:** Click on *New User Registration* in the “Account Management” screen.



**Figure 3: Account Management Screen**

The “New User Registration” screen will open as shown in Figure 4.

## 2.2 User Information

The top part of the “New User Registration” screen is labeled **User Information**. In this portion of the screen, you will enter information needed by the system to identify you and to allow the system to communicate with you through email. This portion of the “New User Registration” screen contains common fields that must be filled in by all requesters regardless of the type of access you are requesting.

Fields that are mandatory are designated by an asterisk (\*) to the right of the field.

**Action:** Fill in fields in the **User Information** section.

The screenshot shows the 'New User Registration' screen. At the top, there is a header for the U.S. Department of Health & Human Services and CMS (Centers for Medicare & Medicaid Services). Below the header, it says 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main title is 'New User Registration'. A message states: 'CMS is authorized to authenticate your personal information using your legal name and Social Security Number.' The 'User Information' section contains the following fields:

- First Name:  \*
- Mi:
- Last Name:  \*
- Social Security Number:  \* (Valid SSN Format is XXX-XX-XXXX)
- E-mail:  \*
- Confirm E-mail:  \*
- Office Telephone:  \* (Valid Phone Number Format is XXX-XXX-XXXX)
- Ext:
- Company Name:  \*
- Company Telephone:  \*
- Ext:
- Address 1:  \*
- Address 2:
- City:  \*
- State:  \*
- Zip Code:  \* -

Figure 4: User Information Portion of Application Screen

### Notes:

- The Social Security Number (SSN) must be unique.
- Enter your email address twice for verification. Please do not cut and paste from one field to the other.

**Action:** Continue on to the **Required Access** portion of the “New User Registration” screen.

### 2.3 Provider (270/271) Specific Registration Fields

**Action:** In the **Required Access** section, choose **Provider (270/271)** for **User Type**.  
(See Figure 5.)

The screenshot shows the 'Access Request' 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). The 'Provider (270/271)' option is selected, indicated by a red arrow. Below this is a 'Justification for Access' text area with a vertical scrollbar and a '\*' symbol to its right. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, there is a note: '\* indicates a required field'. In the bottom left corner, it says 'OMB: 0938-0988' and in the bottom right corner, 'Effective date: 5/06'.

**Figure 5: Required Access Portion of Application Screen**

The screen will refresh and display Provider (270/271) related fields as shown in Figure 6.

The screenshot shows the 'Access Request' screen after selection. The 'User Type' dropdown now shows 'Provider (270/271)'. Below it, there is a 'Role' dropdown menu with a '\*' symbol. Below that is a 'RACF ID' text input field. The 'Justification for Access' text area is still present with a '\*' symbol. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, there is a note: '\* indicates a required field'. In the bottom left corner, it says 'OMB: 0938-0988' and in the bottom right corner, 'Effective date: 5/08'.

**Figure 6: Provider (270/271) Related Fields**

**Action:** In the **Role** field, select the User/Provider role.

The possible roles include:

- **Security Official** – The official of a provider's office or organization who registers with IACS as that organization's Security Official. This person also registers the facility or organization with IACS using an online version of the Electronic Data Interchange (EDI) form. There can be two Security Officials at a facility or organization – a primary and a backup.
- **User/Approver** – Users in this role approve end user requests for access to the 270/271 UI Application. This role is also known as an External Point of Contact (EPOC).
- **User/Provider** – The end-user of the Provider (270/271) application.
- **MEIC Helpdesk** – This role is only for the CMS Medicare Eligibility Integration Contractor (MEIC) Help Desk. Providers will never select this role.

The Role selection options are in a drop down list and appear as shown in Figure 7.

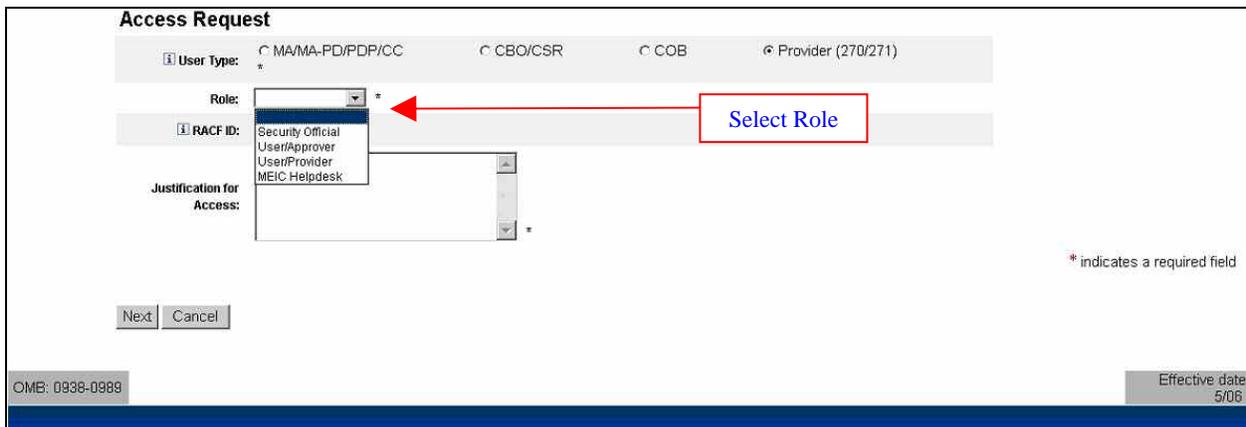


Figure 7: Provider (270/271) Role Field Drop Down List

### 2.3.1 Provider (270/271) – User/Provider Role

The User/Provider sends Medicare eligibility inquiries and reads the responses using the 270/271 user interface (UI) application.

When you select the user role of User/Provider, **User/Provider** will be entered in the **Role** field and additional fields will be displayed as shown in Figure 8.

Figure 8: Provider (270/271) User/Provider Entry Fields

**Action:** Enter the **Billing Provider NPI**. This is a 10-digit number that should be provided to you by your EPOC. If there is no EPOC within your organization, your organization’s Security Official should provide the NPI number.

**Action:** Select the **Provider Type**. To do this, click on the down arrow to the right of the **Provider Type** field. A drop down list will appear from which you can select the desired Provider Type. (See Figure 9.)

Figure 9: Provider (270/271) User/Provider Registration Fields

The selected Provider Type will appear in the **Provider Type** field as shown in Figure 10.

**Action:** Enter a **RACF ID**, if you have one. (This is not a required field.)

The screenshot shows the 'Access Request' form with the following fields and values:

- User Type:** MA/MA-PD/PDP/CC (selected), CBO/CSR, COB, Provider (270/271)
- Role:** UserProvider \*
- Billing Provider NPI:** 4855485546 \*
- Provider Type:** Internal Medicine and General or Family Practice Physician \*
- RACF ID:** (empty field, highlighted with a red arrow)
- Justification for Access:** (empty text area)
- Buttons:** Next, Cancel
- Footer:** OMB: 0938-0989, Effective date 5/08

\* indicates a required field

**Figure 10: Provider (270/271) User/Provider RACF ID Field**

**Action:** Enter a brief statement for the **Justification for Access**. This justification field must include a valid reason for access such as: "Need for work". (See Figure 11.)

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

The screenshot shows the 'Access Request' form with the following fields and values:

- User Type:** MA/MA-PD/PDP/CC (selected), CBO/CSR, COB, Provider (270/271)
- Role:** UserProvider \*
- Billing Provider NPI:** 4855485546 \*
- Provider Type:** Internal Medicine and General or Family Practice Physician \*
- RACF ID:** (empty field)
- Justification for Access:** Need for work. (text area, highlighted with a red arrow)
- Buttons:** Next, Cancel (Next button highlighted with a red arrow)
- Footer:** OMB: 0938-0989, Effective date 5/08

\* indicates a required field

**Figure 11: Provider (270/271) User/Provider Justification 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.

## 2.4 Completion of Registration Process

When the data in all the “User Information” and “Required Access” fields are valid and all mandatory fields have been completed, the system will display a screen in which you can review the information you entered in the “New User Registration” screen. An example of this “Review Registration Details” screen is shown in Figure 12.

The screenshot shows a web browser window with the following content:

- Header: U.S. Department of Health & Human Services, CMS Centers for Medicare & Medicaid Services
- Sub-header: Individuals Authorized Access to the CMS Computer Services (IACS)
- Title: Review Registration Details
- Text: The following is the information you entered on the New User Registration Form. Please review the information below to verify correctness.
  - To modify any of the information, click 'Edit'.
  - If the information is correct and you wish to proceed, click 'Submit'.
- Form Fields:
  - First Name: Test
  - Mt: A
  - Last Name: Planner
  - Social Security Number: 324-00-8932
  - E-mail: abcd@abdd.com
  - Office Telephone: 324-367-8932x3245
  - Company Name: CMS
  - Company Telephone: 324-367-8932x3243
  - Address 1: 7133 Rutherford
  - Address 2: #250
  - City: Woodlawn
  - State: MD
  - Zip Code: 21244-1234
  - Role: Representative
  - Contract(s): H1010
- Buttons: Submit, Edit, Cancel
- Footer: OMB: 0938-0989, Effective date: 5/06

Figure 12: Example of Review Registration Details Screen

If there is registration information you want to modify, click the **Edit** button. The “New User Registration” screen will be redisplayed with all your information populated in the appropriate fields. You may modify the information that you determined was not correct and click on the **Next** button. You will again be presented with the “Review Registration Details” screen. When you are satisfied that your registration information is correct, click the **Submit** button. A “Terms and Conditions” screen will open as shown in Figure 13.

If you click on the **Cancel** button, the application request is cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must click **OK** to exit that screen. The system will then return you to the “CMS Applications Portal Introduction” screen.

**Action:** Read all of the **Privacy Act Statement** by scrolling down as needed through all of the screens.

**Action:** Check the “I Accept the above Terms and Conditions” box

**Action:** Click on **I Accept**

If you click on **I Accept** without checking the “I Accept the above Terms and Conditions” box, a message appears at the top of the screen indicating you must check the box to proceed any further.

**Note:** If you select “I Decline” instead of “I Accept”, the application request is cancelled and a screen indicating this will be displayed. You must click **OK** to exit that screen. The system will then return you to the “CMS Applications Portal Introduction” screen.

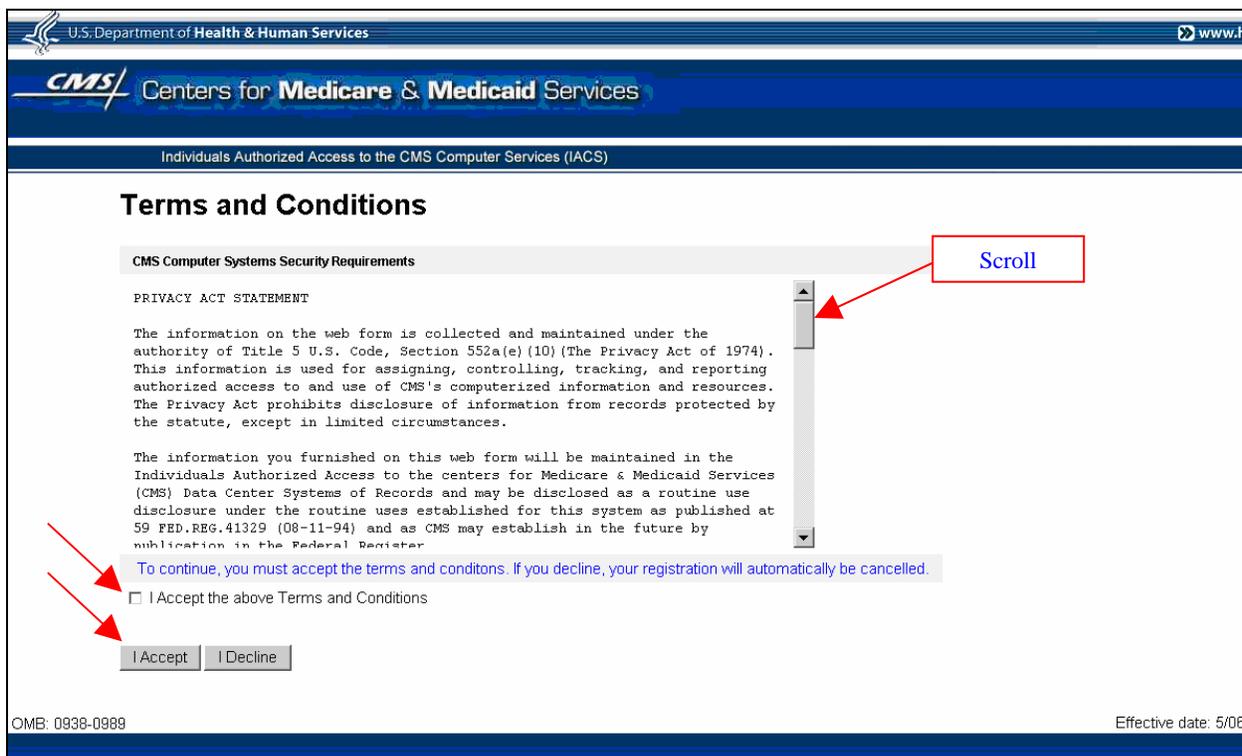


Figure 13: Privacy Act Statement Screen

When you check the “I Accept the above Terms and Conditions” box and click ***Accept*** in the “Terms and Conditions” screen, the system will display a “Registration Acknowledgement” screen as shown in Figure 14.

The “Registration Acknowledgement” screen indicates your registration request has been successfully submitted and indicates the tracking number of your request. Use this tracking number if you have questions about the status of your request.

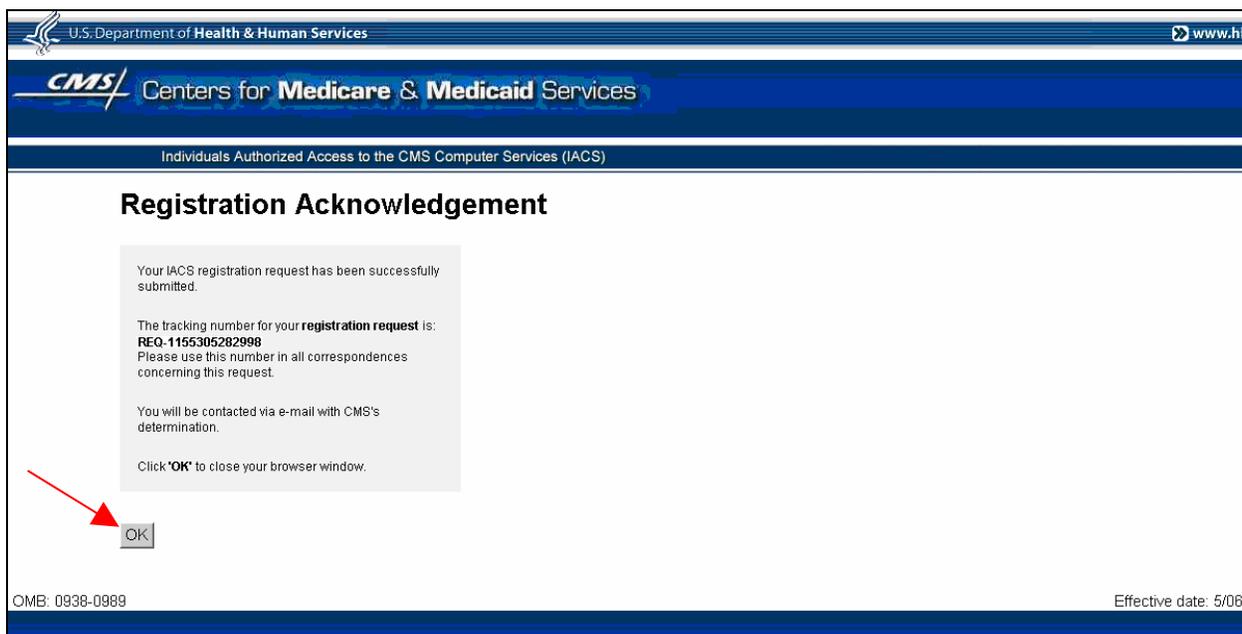


Figure 14: Registration Acknowledgement Screen

**Action** Click **OK**

**Note:** Submission of registration form and agreement of terms will constitute an electronic signature.

The “Registration Acknowledgement” screen will close and the system will take you back to the “Account Management” screen.

### After Registration

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 this email notification is not received within 24 hours after you register, please contact the applicable Help Desk for your user community. (See **Section 4.2 Help Desk Information**.) Figure 15 presents an example of the email providing your Request Number.

Please use the following Request Number when contacting CMS regarding your request.

Request #: REQ-1234567890123.

Your request has been received by the Individuals Authorized Access to the CMS Computer Services (IACS).

Please do not reply to this system-generated email.

**Figure 15: Example of Request Number Email**

Your approver will be notified of your pending request via email. Once your request has been approved and your account has been created, two separate email messages will be automatically sent to you. The first (**Subject:** FYI: User Creation Completed – Account ID Enclosed) will contain your Global User ID. The second (**Subject:** FYI: User Creation Completed – Password Enclosed) will contain the format of your initial password. You will be required to change your initial password the first time you login.

**Action:** Refer to the **Logging in for the First Time** document and follow the steps for logging in and changing your password. You do not have to answer the authentication questions again unless you want to change your answers.

**Note:** If you are an end-user and your EPOC has not processed your access request within 12 calendar days of your request submission, the request is automatically cancelled and you will receive an email notification to this effect. You will then have to go to the **New User Registration** screen, re-enter your information, and resubmit your access request.

**Note:** If you are an Approver, MEIC Help Desk person, or Security Official and your access request has not been processed within 24 calendar days of your request submission, the request is automatically cancelled and you will receive an email notification to this effect. You will then have to go to the **New User Registration** screen, re-enter your information, and resubmit your access request.

Figure 16 presents an example of the email providing your User Identifier (UID).

Figure 17 presents an example of the email providing your temporary one-time password.

The tracking number of your request is REQ-1234567890123

To access the CMS internet applications, use the following User Identifier (UID): AAAAnnn

Thank you,

IACS

Please do not reply to this system-generated email.

**Figure 16: Example of UID Email**

**Note:** The User Identifier (UID) will be in the format “AAAAnnn”, where “AAAA” are alpha characters and “nnn” are numeric characters.

The tracking number for your request is REQ-1234567890123

Your temporary one time password is the first two letters of your last name (where the first letter is upper case and the 2nd letter is lower case) and the last 6 digits of your Social Security Number.

Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>

Read the Privacy Statement and select Enter.  
Select the “**Account Management**” link on the blue menu bar, and then the “**My Profile**” link.

Log into IACS using your UID and password to change your password.

Thank You,  
IACS

Please do not reply to this system-generated email.

**Figure 17: Example of a Password Email**

If your request is denied, you will be sent an email informing you of this. The email will also provide the justification given for the denial. Figure 18 is an example of a denial email.

Contract Number: XXXXX

The request submitted to create system access to a system at the centers for Medicare and Medicaid Services (CMS) has been denied for the following reason:

Justification: <Text of Justification>

Thank You,  
IACS

Please do not reply to this system-generated email.

**Figure 18: Example of a Request Denial Email**

If your request is cancelled after 12 or 24 days, you will be sent an email informing you of this. Figure 19 is an example of a cancellation email.

The request REQ-1163607621253 waiting for approval has expired. Please submit **a new** request.

Thank You,  
IACS\

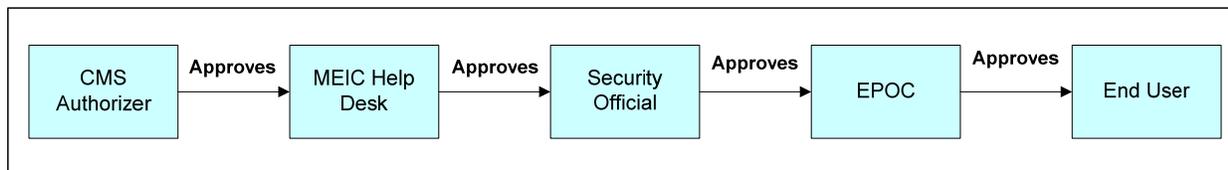
Please do not reply to this system-generated email

**Figure 19: Example of a Request Cancellation Email**

### 2.5 Provider (270/271) Approval Process

After the IACS registration process is completed, your registration request is submitted for approval. For the 270/271 Provider roles (User/Provider, User/Approver, Security Official, MEIC Help Desk) the actual approver depends on the role and the requester’s organization.

The diagram shown in Figure 20 represents the approval process for large provider organizations in which there are sufficient personnel for the role of EPOC to be viable role. A CMS Authorizer approves the MEIC Help Desk requester. Once the MEIC Help Desk user is approved, he/she has the authority to approve users at all other levels. The MEIC Help Desk is the only approval authority of the Security Official. The Security Official approves EPOCs who in turn, approve End Users.



**Figure 20: Provider (270-271) Typical Approval Process**

In a small provider organization in which the EPOC role is not a viable role, a special approval process is followed. Even though a provider organization may consist of a provider and a small staff, there must still be a Security Official within the organization. The Security Official is approved by the MEIC Help Desk, however, the Security Official only has approval authority for EPOCs. They cannot approve end users. In this case, an end user request is also processed by the MEIC Help Desk. This Special Approval Process is illustrated in Figure 21.

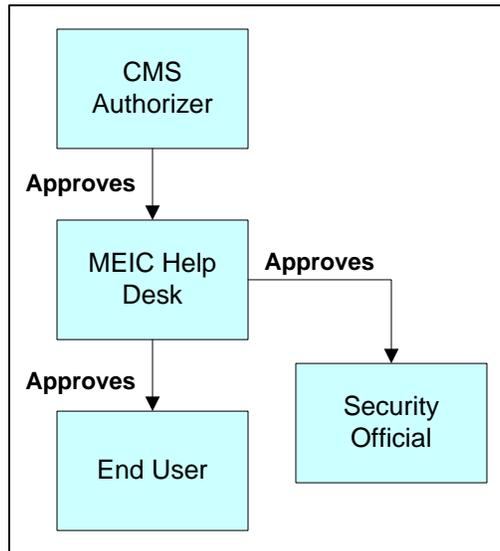


Figure 21: Provider (270-271) Special Approval Process

## 2.6 Modify Account Profile

Occasionally users may want to modify their existing CMS Provider (270/271) account profile. The only Provider (270/271) user who can directly modify his/her account profile is the Primary Security Official. All other Provider (270/271) users must contact the MEIC Help Desk to make changes to an account profile. (The MEIC Help Desk phone number is 1-866-440-3805. They can be contacted at [MCARE@cms.hhs.gov](mailto:MCARE@cms.hhs.gov).)

## 3.0 Questions and Troubleshooting

### 3.1 Help

For questions regarding the IACS system, please go to the CMS FAQ page as follows:

- Go to: <https://www.cms.hhs.gov/home/tools.asp>
- Under **Sitewide Tools and Resources**
- Click on **Frequently Asked Questions**
- Do a Search on “**IACS**”

Answers to many commonly asked IACS questions can be found through this process. If you have further questions, please call the applicable Help Desk for your user community. (See **Section 4.2 Help Desk Information.**)

### 3.2 Being Proactive

A large majority of the problems users of the IACS system face occur due to human error. Most of these can be avoided if greater care is exercised during the registration and approval process. Please double-check information on the registration form prior to submission. If you are an approver, double-check the information that your users have entered, before approving or rejecting the request. These two quick and simple steps will help get users into the IACS system as quickly as possible.

### 3.3 Proper Software

To optimize your access to the IACS screens, ensure the following criteria are met.

1. CMS screens are designed to be viewed at a minimum screen resolution of 800 x 600.
2. Use Internet Explorer, version 6.0 or higher.
3. Verify that the latest version of JAVA and/or ActiveX is installed on your PC.
4. Disable pop-up blockers prior to attempting access the CMS Applications Portal.

Contact your appropriate Help Desk if you have questions about any of the above criteria. (Refer to **Section 4.2 Help Desk Information.**)

## 4.0 Helpful Hints

### 4.1 Registering in IACS

1. When entering your email address, please be very careful to type the correct email address. If your email address is entered incorrectly, you will not receive your new User ID and Password.
2. When entering multiple similar items such as Contract Numbers, Call Centers, or Organization Numbers, you need to hit the **Add** button after each and every item that is entered. Do not enter all items on one line.
3. If you have a RACF-ID already assigned (this is the same as your HPMS User ID, if you have one), you need to enter that into your registration when prompted. This User ID must be entered in all UPPERCASE letters.
4. Once a user completes their registration in IACS, the EPOC will receive an email prompting them to approve the user. Follow up with your EPOC(s) to ensure this step is completed.
5. User IDs will not be issued until approvals/rejections are completed for all items entered – and there may be separate approvers for different item numbers.
6. If you have not received an email with a confirmation of your request within 24 hours of registration, please call the applicable Help Desk for your user community. (See **Section 4.2 Help Desk Information.**)
7. Do not respond to the email for any notifications you receive regarding IACS. Call the appropriate Help Desk. Responding to the email will delay any required assistance.

### 4.2 Help Desk Information

The Help Desk associated with the 270/271 Provider community is the MEIC Help Desk. The phone number is 1-866-440-3805. They can be contacted at *MCARE@cms.hhs.gov*.

## 5.0 Legal

### 5.1 *Privacy Act Statement*

The information on the web form is collected and maintained under the authority of Title 5 U.S.C., §552(e) (10). This information is used for assigning, controlling, tracking, and reporting authorized access to and use of CMS's computerized information and resources. The Privacy Act prohibits disclosure of information from records protected by the statute, except in limited circumstances.

The information you furnished on this web form will be maintained in the Individuals Authorized Access to the Centers for Medicare & Medicaid Services Computer Services (IACS) Systems of Records and may be disclosed as a routine use disclosure under the routine uses established for this system as published at 09-70-0064 (08-11-94) and as CMS may establish in the future by publication in the Federal Register.

The Social Security Number (SSN) is used as an identifier in the Federal Service because of the large number of present and former Federal employees and applicants whose identity can only be distinguished by use of the SSN is authorized by Executive Order 9397. Furnishing the information on this form, including your Social Security Number, is voluntary. However, if you do not provide this information, you will not be granted access to CMS computer systems.

### 5.2 *Rules of Behavior*

CMS computer systems that you are requesting to use contain sensitive information. Sensitive information is any information which the loss, misuse, unauthorized access to, or modification of could adversely affect the national interest, or the conduct of Federal programs, or the privacy to which individuals are entitled under the Privacy Act. To ensure the security and privacy of sensitive information in Federal computer systems, the Computer Security Act of 1987 requires agencies to identify sensitive computer systems, conduct computer security training, and develop computer security plans. CMS maintains a system of records for use in assigning, controlling, tracking, and reporting authorized access to and use of CMS's computerized information and resources. CMS records all access to its computer systems and conducts routine review for unauthorized access to and/or illegal activity.

Anyone with access to CMS Computer Systems containing sensitive information must abide by the following:

- Do not disclose or lend your IDENTIFICATION NUMBER AND/OR PASSWORD to someone else. They are for your use only and serve as your electronic signature. This means that you may be held responsible for the consequences of authorized or illegal transactions.
- Do not browse or use CMS data files for unauthorized or illegal purposes.
- Do not use CMS data files for private gain or to misrepresent yourself or CMS.
- Do not make any disclosure of CMS data that is not specifically authorized.
- Do not duplicate CMS data files, create sub-files of such records, remove or transmit data unless you have been specifically authorized to do so.

- Do not change, delete, or otherwise alter CMS data files unless you have been specifically authorized to do so.
- Do not make copies of data files, with identifiable data, or data that would allow individual identities to be deduced unless you have been specifically authorized to do so.
- Do not intentionally cause corruption or disruption of CMS data files.

A violation of these security requirements could result in termination of systems access privileges and/or disciplinary/adverse action up to and including legal prosecution. Federal, State, and/or local laws may provide criminal penalties for any person illegally accessing or using a Government-owned or operated computer system. If you become aware of any violation of these security requirements or suspect that your identification number or password may have been used by someone else, immediately report that information to your component's Information Systems Security Officer or your organization approving official for CMS access.