

Individuals Authorized Access to CMS Computer Services (IACS) User Guide

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Centers for Medicare & Medicaid Services (CMS)

OIS/ISMG

7500 Security Boulevard, N3-00-01

Baltimore, Maryland 21244-1850

Prepared by:

Northrop Grumman Corporation

Information Technology

7575 Colshire Drive

McLean, VA 22102

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APPROVALS

Elaine Purcell, NG
Author/Business Analyst

Date

Dr. Yuri Radams, NG
IACS Project Manager/Chief Architect

Date

Byron Earley, NG
Technical Editor

Date

Sarah Worthing, NG
Quality Assurance Manager

Date

Charles Lall, NG
IACS Program Manager

Date

Nancy Martin, CMS
Government Task Lead

Date

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1.0 Introduction

1.1 Purpose

This document establishes the procedures for registering and provisioning users and approvers using the Individuals Authorized Access to CMS Computer Services (IACS) application within the Centers for Medicare & Medicaid Services (CMS).

1.2 Background

One of CMS' strategic goals is to streamline our information technology environment so that existing and new systems can work more effectively by sharing information, and so that CMS can be more responsive to the demands of changing business needs and the promises of emerging technology. CMS plans to make our data more readily accessible to our beneficiaries, partners, and stakeholders in a secure, efficient, and carefully planned manner.

In striving to meet these goals, CMS has established a target enterprise architecture and modernization strategy that is based upon several key design principles:

- An established, secure Internet architecture for the CMS enterprise
- Defined products for the target enterprise architecture
- Defined security classifications and controls for CMS applications
- Defined security services that support the architecture and implement the controls
- Prescriptive application development standards and guidelines for the target environment

Registering and provisioning users for the IACS system is fundamental to the design and implementation of business applications/systems planned for the CMS target enterprise architecture.

1.3 Roles and Responsibilities

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

User - A user is a Medicare Advantage/Medicare Advantage – Prescription Drug/Prescription Drug Plan/Cost Contract (MA/MA-PD/PDP/CC) Submitter/Representative, a Community Based Organization/Customer Service Representative (CBO/CSR), or a Coordination of Benefits (COB) Transmitter for Voluntary Data Sharing Agreement (VDSA) and Coordination of Benefits Agreement (COBA) Organizations. 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 users requesting access to CMS systems, which includes employees within their organization as well as subcontractor end users. They may not also be a user of the system. 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 your organization, e.g., management official, compliance officer, etc.

1.4 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.

1.5 Version Release Notes

This version of the IACS Users Guide incorporates the redesigned IACS user screens. This version is considered to be a Draft document because the screens are in the final stages of design and approval and there may yet be minor changes. If changes do occur, they will be incorporated into this document as part of the Final version. This version also incorporates updates delivered in Version 5.0a, Change Pages.

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 government computer system WARNING, and then agree by clicking **Enter**.

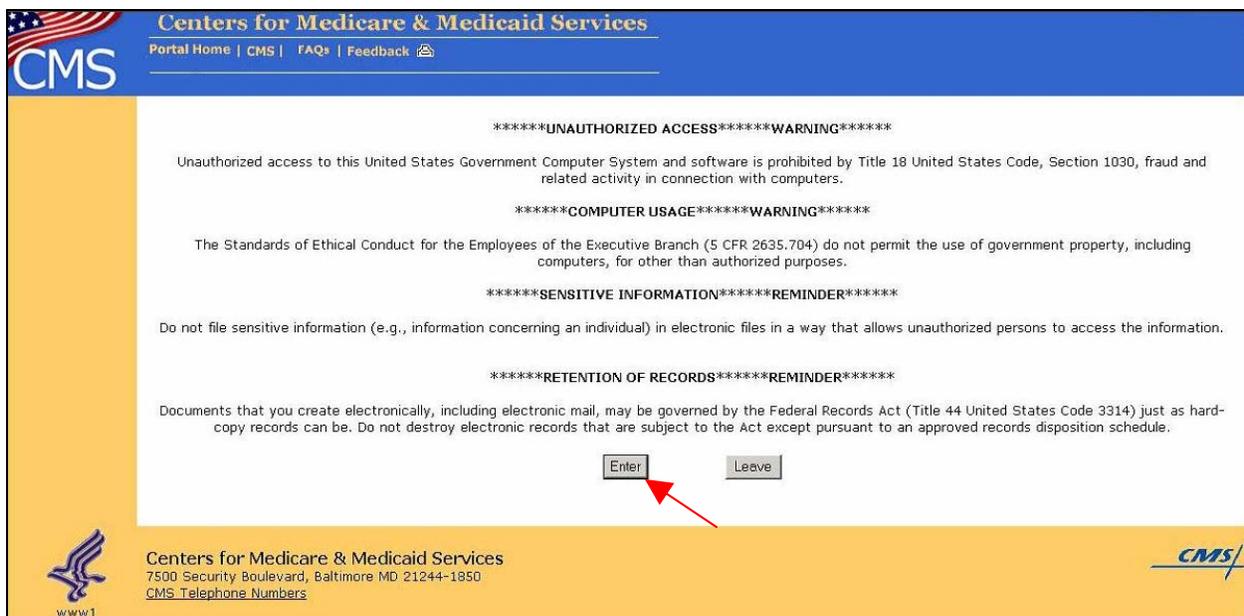


Figure 1: Government Computer System Warning Screen

The CMS Application Portal screen will open as shown in Figure 2.

Action: Click on **Account Management** on the left sidebar.

Centers for Medicare & Medicaid Services
Portal Home | CMS | FAQs | Feedback

CMS Applications Portal Links:

- ★ Introduction
- ★ **Account Management**
- ★ Plans
- ★ Providers
- ★ Data Service

CMS Applications Portal

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 Service** - Data Services for internal CMS users

Please refer to the links on the left panel and select a service to continue.

FOIA | Help | Email Updates | CMS Careers
Health and Human Services | Medicare.gov | FirstGov

Centers for Medicare & Medicaid Services
7500 Security Boulevard, Baltimore MD 21244-1850
[CMS Telephone Numbers](#)

Figure 2: CMS Application Portal Screen

The screen will update to screen shown in Figure 3.

Action: Click on **New User Registration applications** in the main screen.



Figure 3: Registration Access Selection 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 application 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.

U.S. Department of Health & Human Services

www.hhs.gov

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

New User Registration

CMS is authorized to authenticate your personal information using your legal name and Social Security Number.

User Information

First Name: * MI: Last Name: *

Social Security Number: * Valid SSN Format is XXX-XX-XXXX

E-mail: * Confirm E-mail: *

Office Telephone: * Ext: Valid Phone Number Format is XXX-XXX-XXXX

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.
- A unique, corporate email address is required. Non-corporate email addresses are prohibited (e.g. ssmith@yahoo.com, mjordan@hotmail.com).

Action: Continue on to the **Required Access** portion of the Application for Access screen.

2.3 Required Access Information for Users

In the **Required Access** section, you may select one of three User Types as shown in Figure 6:

- MA/MA-PD/PDP/CC – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts
- CBO/CSR – Community Based Organization/Customer Service Representative
- COB – Coordination of Benefits – VDSA and COBA Organizations

The fields in this portion of the form will vary depending on the User Type selected. The screens showing the fields for those of you requesting a Role other than Approver for each User Type are displayed and described in the following sections:

If you are an Approver, you may go to Section 2.4, Required Access Information for Approvers, for instructions on filling out the Required Access information.

- MA/MA-PD/PDP/CC
- Section 2.3.2: CBO/CSR

- Section 2.3.3: COB

You may go directly to the section of interest to you for instructions on filling out the Required Access information.

If you are an Approver, you may go to Section 2.4, Required Access Information for Approvers, for instructions on filling out the Required Access information.

2.3.1 MA/MA-PD/PDP/CC

Action: In the *Required Access* section, choose *MA/MA-PD/PDP/CC* for *User Type*. (See Figure 5)

The screenshot shows the 'Access Request' form. At the top, the title 'Access Request' is displayed. Below it, the 'User Type' dropdown menu is open, showing three options: 'MA/MA-PD/PDP/CC' (selected), 'CBO/CSR', and 'COB'. A red arrow points to the selected option. Below the dropdown, there is a 'Justification for Access' text area. At the bottom left, there are 'Next' and 'Cancel' buttons. At the bottom right, there is a note '* indicates a required field'. The footer contains 'OMB: 0938-0989' and 'Effective date: 5/06'.

Figure 5: Required Access Portion of Application Screen

The screen will refresh and display an MA/MA-PD/PDP/CC related Role field as shown in Figure 6.

The screenshot shows the 'Access Request' form after refreshing. The 'User Type' dropdown menu is still open, showing 'MA/MA-PD/PDP/CC' (selected), 'CBO/CSR', and 'COB'. Below the dropdown, there is a 'Role' dropdown menu. Below the 'Role' dropdown, there is a 'Justification for Access' text area. At the bottom left, there are 'Next' and 'Cancel' buttons. At the bottom right, there is a note '* indicates a required field'. The footer contains 'OMB: 0938-0989' and 'Effective date: 5/06'.

Figure 6: MA/MA-PD/PDP/CC Related Field

Action: In the **Role** field, you may select **User/Submitter** (sends and receives data files, may look up data using the MARx/MBD user interface) or **User/Representative** (looks up data using the MARx/MBD user interface; does not send/receive data files) as your user role. The Role selection options are in a drop down list and appear as shown in Figure 7.

The screenshot shows the 'Access Request' form. At the top, there are three radio buttons for 'User Type': 'MA/MA-PD/PDP/CC' (selected), 'CBO/CSR', and 'COB'. Below this is a 'Role:' dropdown menu with a red asterisk indicating it is a required field. A red box labeled 'Select Role' has an arrow pointing to the dropdown. The dropdown menu is open, showing three options: 'User/Submitter', 'User/Representative', and 'Approver'. Below the dropdown is a 'Justification for Access:' field. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, there is a note: '* indicates a required field'. The footer contains 'OMB: 0938-0989' on the left and 'Effective date: 5/06' on the right.

Figure 7: MA/MA-PD/PDP/CC Role Field

2.3.1.1 MA/MA-PD/PDP/CC – User/Submitter Role

When you select the user role of User/Submitter, the screen will refresh and Contract Number fields will be displayed as shown in Figure 8. You may enter a Contract Number (example: Hxxxx,9xxxx, Exxxx, Rxxxx or Sxxxx) as a User/Submitter, a Prescription Drug Event (PDE) submitter, or a Risk Adjustment Processing System (RAPS) submitter. You can enter Contract Numbers in any, or all, of the Contract Number fields as they apply to your work.

Action: Enter **Contract Numbers** (example: Hxxxx, 9xxxx, Exxxx, Rxxxx, or Sxxxx) one at a time, and click **Add** (See Figure 8).

Access Request

User Type: MA/MA-PD/PDP/CC C.CRO/CSR C.COR

Role: *

For the User/Submitter Role, at least one Contract/Mailbox Number must be submitted. *

Plan Contract Number: Ex: Hxxxx or Sxxxx

PDE Mailbox Number: Ex: Hxxxx or Sxxxx

RAPS Mailbox Number: Ex: Hxxxx or Sxxxx

RACF ID:

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure 8: MA/MA-PD/PDP/CC Contract Number Fields – User/Submitter

- Contract numbers must be entered one at a time. Click **Add** after each entry.
- If you enter an invalid contract number, the screen will refresh and an error message will appear near the top of the screen informing you of the error and requesting that you enter a valid contract number. Scroll down the page to the Contract Number/s field/s and enter a valid contract number.

After the Contract Number/s is entered, the screen will refresh and display the entered Contract Numbers in separate, labeled fields as shown in Figure 9. Below the entered Contract Number fields is a field for you to enter your RACF ID.

Action: Enter a **RACF ID**, if you have one.

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

- User Type:** MA/MA-PD/PDP/CC (selected), CBO/CSR, COB
- Role:** User/Submitter *
- Plan Contract Number:** [] Add Ex: Hxxxx or Sxxxx
- PDE Mailbox Number:** [] Add Ex: Hxxxx or Sxxxx
- RAPS Mailbox Number:** [] Add Ex: Hxxxx or Sxxxx
- Contract(s):** H1010
- PDE Contract(s):** HC151
- RAPS Contract(s):** HC150
- RACF ID:** [] (highlighted with a red arrow)
- Justification for Access:** [] *

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure 9: MA/MA-PD/PDP/CC RACF ID Field

Note: The RACF ID should be entered in all UPPER case. If your RACF ID is not known, STOP and call the applicable Help Desk for your user community to obtain your RACF ID information.

Attention Existing CMS System Users: If you have already been assigned a RACF ID to access CMS systems (e.g. HPMS), you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN. Once you've been approved as an IACS user, your RACF and IACS passwords will automatically synchronize, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

Action: Enter a brief statement for the **Justification**. This justification field must include a valid reason for access. (See Figure 10)

Action: Click on **Next** when you are done filling in all the required fields on the Application for Access screen.

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Role: *

For the User/Submitter Role, at least one Contract/Mailbox Number must be submitted. *

Plan Contract Number: Add Ex: Hxxxx or Sxxxx

PDE Mailbox Number: Add Ex: Hxxxx or Sxxxx

RAPS Mailbox Number: Add Ex: Hxxxx or Sxxxx

Contracts: H1010

PDE Contracts: HC151

RAPS Contracts: HC150

RACF ID:

Justification for Access:

Next Cancel

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure 10: MA/MA-PD/PDP/CC Justification Field

When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the Application for Access 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 the Privacy Act Statement for you to read. Go to **Section 2.5—Completion of Registration Process** for the Privacy Act Statement acceptance procedure and the final registration screen.

2.3.1.2 MA/MA-PD/PDP/CC – User/Representative Role

When you select the user role of **User/Representative**, the screen will refresh and a Contract Number field will be displayed as shown in Figure 11.

Action: Enter **Contract Numbers** (example: Hxxxx, 9xxxx, Rxxxx, or Sxxxx) one at a time, and click **Add**.

Access Request

User Type: MA/MA PD/PDP/CC CBO/CSR COB

Role: *

Please enter one contract at a time and click 'Add'

Contract Numbers: Ex: Hxxxx or Sxxxx

RACF ID:

Justification for Access:

* indicates a required field.

OMB: 0938-0989 Effective date: 5/06

Figure 11: MA/MA-PD/PDP/CC Contract Number Fields – User/Representative

- Contract numbers must be entered one at a time. Click **Add** after each entry.
- If you enter an invalid contract number, the screen will refresh and an error message will appear near the top of the screen informing you of this and requesting that you enter a valid contract number. Scroll down the page to the Contract Number/s field/s and enter a valid contract number.

After the Contract Number/s is entered, the screen will refresh and display the entered Contract Number/s. Below the entered Contract Number field is a field for you to enter your RACF ID.

Action: Enter a **RACF ID**, if you have one.

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

- User Type:** MA/MA-PD/PDP/CC (selected), CBO/CSR, COB
- Role:** UserRepresentative *
- Contract Numbers:** Input field with 'Add' button and example 'Ex: Hxxxx or Sxxxx'
- Contracts:** H1010
- RACF ID:** Input field with a red arrow pointing to it.
- Justification for Access:** Text area.

At the bottom right, a note states: '* indicates a required field'. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom of the page, the text 'OMB: 0938-0989' and 'Effective date: 5/06' is visible.

Figure 12: MA/MA-PD/PDP/CC RACF ID Field

Note: The RACF ID should be entered in all UPPER case. If your RACF ID is not known, STOP and call the applicable Help Desk for your user community to obtain RACF ID information.

Attention Existing CMS System Users: If you have already been assigned a RACF ID to access CMS systems (e.g. HPMS), you must enter this ID when you register for IACS. The IACS system enforces this rule based on your SSN. Once you've been approved as an IACS user, your RACF and IACS passwords will automatically synchronize, as long as you use IACS for all future password changes. Changing your RACF password via EUA will NOT cause synchronization with IACS to occur.

Action: Enter a brief statement for the **Justification**. This justification field must include a valid reason for access. (See Figure 13)

Action: Click on **Next** when you are done filling in all the required fields on the Application for Access screen.

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Role: *

Please enter one contract at a time and click 'Add'

Contract Numbers: Add Ex: Hxxxx or Sxxxx

Contracts: H1010

RACF ID:

Justification for Access:

Next Cancel

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure 13: MA/MA-PD/PDP/CC Justification Field

When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the Application for Access 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 the Privacy Act Statement for you to read. Go to **Section 2.5—Completion of Registration Process** for the Privacy Act Statement acceptance procedure and the final registration screen.

2.3.2 CBO/CSR

Action: In the **Required Access** section, choose **CBO/CSR** for **User Type**. (See Figure 14)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Justification for Access:

Next Cancel

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure 14: Required Access Portion of Application Screen

The screen will refresh and display CBO/CSR related fields as shown in Figure 15.

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Role: *

Call Center: 28th Avenue, Phoenix, AZ Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

Next Cancel

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure 15: CBO/CSR Related Fields Screen

Action: From the drop down list select **User** as your **Role**. (See Figure 16)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Role: *

Call Center: User Approver Phoenix, AZ Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

Next Cancel

* indicates a required field

OMB: 0938-0989 Effective date: 5/06

Figure 16: CBO/CSR Role Drop Down List

Action: From the Call Center list, select your **Call Center** then click **Add**. (See Figure 17)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Justification for Access:

28th Avenue, Phoenix, AZ
 Black Canyon, Phoenix, AZ
 Blue Cross/Blue Shield, Little Rock, AR
 Columbia, Broad River, SC
 Columbia, SC
 Corvergys, Coastal (Jacksonville), NC
 Corvergys, Denver, CO
 Corvergys, Tamarac, FL
 Coramille, IA
 Corwin, KY
 First Coast Service Option, Jacksonville, FL

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure 17: CBO/CSR Call Center Drop Down List

The screen refreshes and the selected Call Center is displayed just above the Justification field.

Action: Enter a brief statement for the **Justification**. This justification field must include a valid reason for access. (See Figure 18)

Action: Click on **Next** when you are done filling in all the required fields on the Application for Access screen.

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Call Center(s): 28th Avenue, Phoenix, AZ

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure 18: CBO/CSR Justification Field

When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not completed, the system will redisplay the Application for Access 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 the Privacy Act Statement for you to read. Go to **Section 2.5– Completion of Registration Process** for the Privacy Act Statement acceptance procedure and the final registration screen.

2.3.3 COB

Action: In the *Required Access* section, choose **COB** for *User Type*. (See Figure 19)

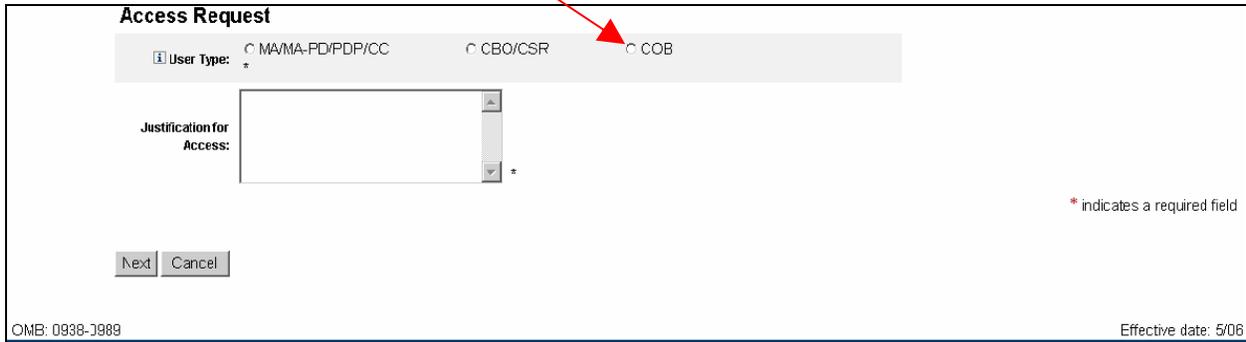


Figure 19: Required Access Portion of Application Screen

The screen will refresh and display COB related fields as shown in Figure 20.

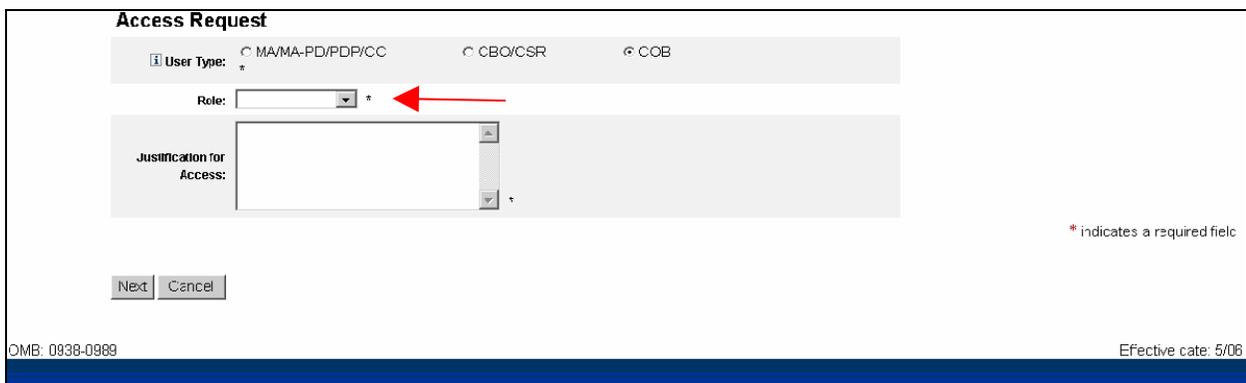


Figure 20: COB Related Field

Action: From the drop down list select *User/Transmitter* as your **Role**. (See Figure 21)

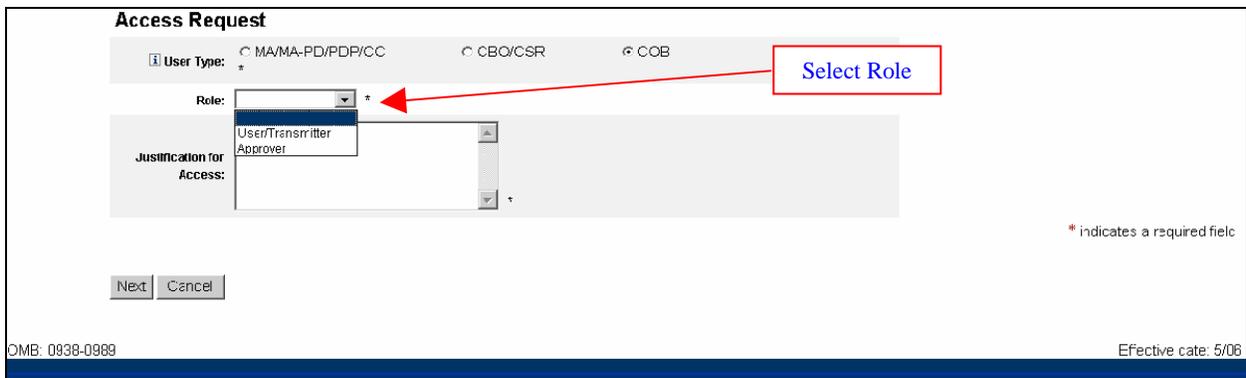


Figure 21: COB Role Drop Down List

After the user role is selected, the screen will refresh and additional COB related fields will be displayed as shown in Figure 22.

Action: From the **Organization Identifier** drop down list, select either **Coordination of Benefits Agreement (COBA)** or **Voluntary Data Sharing Agreement (VDSA)**. (See Figure 22)

Access Request

User Type: MA/MA-PD/PDP/CC * CBO/CSR COB

Role: *

Organization Identifier: *

Organization Number: Add

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

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure 22: COB Organization Identifier Drop Down List

Action: Enter **Organization Numbers** one at a time, and click **Add** (See Figure 23)

Access Request

User Type: MA/MA-PD/PDP/CC * CBO/CSR COB

Role: *

Organization Identifier: *

Organization Number: Add

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

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date: 5/06

Figure 23: 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 24.

Action: Enter a brief statement for the **Justification**. This justification field must include a valid reason for access. (See Figure 24)

Action: Click on **Next** when you are done filling in all the required fields on the Application for Access 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
- Role:** User/Transmitter *
- Organization Identifier:** Coordination of Benefits Agreement (COBA) *
- Organization Number:** (empty) Add
- OrganizationNumber/s:** 1234
- Justification for Access:** (empty text area) *

Red arrows point to the 'Next' button and the 'Justification for Access' field. A legend indicates that '*' indicates a required field. The footer shows 'OMB: 0938-0989' and 'Effective date: 5/06'.

Figure 24: COB Justification Field

When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the Application for Access 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 the Privacy Act Statement for you to read. Go to **Section 2.5—Completion of Registration Process** for the Privacy Act Statement acceptance procedure and the final registration screen.

2.4 Required Access Information for Approvers

In the **Required Access** section, you may select one of three User Types as shown in Figure 25:

- MA/MA-PD/PDP/CC – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts
- CBO/CSR – Community Based Organization/Customer Service Representative
- COB – Coordination of Benefits

The screens showing the fields for those of you requesting an Approver role for each User Type are displayed and described in the following sections:

- Section 2.4.1: MA/MA-PD/PDP/CC Approver
- Section 2.4.2: CBO/CSR Approver
- Section 2.4.3: COB Approver

You may go directly to the section of interest to you for instructions on filling out the Required Access information.

2.4.1 MA/MA-PD/PDP/CC Approver

Action: In the *Required Access* section, choose *MA/MA-PD/PDP/CC* for *User Type*. (See Figure 25)

The screenshot shows the 'Access Request' form. At the top, the title 'Access Request' is displayed. Below it, the 'User Type' field is a radio button selection with three options: 'MA/MA-PD/PDP/CC' (selected), 'CBO/CSR', and 'COB'. The 'MA/MA-PD/PDP/CC' option has an asterisk next to it. Below the radio buttons is a text area labeled 'Justification for Access:' with a scroll bar and an asterisk. 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' on the left and 'Effective date: 5/06' on the right. A red arrow points to the 'MA/MA-PD/PDP/CC' radio button.

Figure 25: Required Access Portion of Application Screen

The screen will refresh and display an MA/MA-PD/PDP/CC related Role field as shown in Figure 26.

The screenshot shows the 'Access Request' form after refreshing. The 'User Type' field remains 'MA/MA-PD/PDP/CC'. A new 'Role' field has appeared, which is a dropdown menu with an asterisk next to it. The 'Justification for Access:' text area and the 'Next' and 'Cancel' buttons are still present. The note '* indicates a required field' is also present. The footer contains 'OMB: 0938-0989' on the left and 'Effective date: 5/06' on the right.

Figure 26: MA/MA-PD/PDP/CC Related Fields

Action: Select Approver from the Role selection drop down list as shown in Figure 27.

Figure 27: MA/MA-PD/PDP/CC Role Field

Action: Enter **Contract Numbers** (example: Hxxxx, 9xxxx, Exxxx, Rxxxx, or Sxxxx) one at a time, and click **Add** (See Figure 28)

Figure 28: MA/MA-PD/PDP/CC Contract Number Fields

- Contract numbers must be entered one at a time. Click **Add** after each entry.
- Contract numbers will appear after the Contract Number(s) field.
- If you enter an invalid contract number, the screen will refresh and an error message will appear near the top of the screen informing you of this and requesting that you enter a valid contract number. Scroll down the page to the Contract Number/s field/s and enter a valid contract number.

After the Contract Number/s is entered, the screen will refresh as shown in Figure 29.

Action: Enter a brief statement for the **Justification**. 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 Application for Access screen.

Access Request

User Type: MAMA-PD/PDP/CC CBO/CSR COB

Role: Approver *

Please enter one contract at a time and click 'Add'

Contract Number(s): Add [Click to box or boxes](#)

Contract(s): H101D

Justification for Access: *

Next Cancel

* indicates a required field

OMB: 0933-0989 Effective date: 5/06

Figure 29: MA/MA-PD/PDP/CC Justification Field for Approver

When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the Application for Access 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 the Privacy Act Statement for you to read. Go to **Section 2.5—Completion of Registration Process** for the Privacy Act Statement acceptance procedure and the final registration screen.

2.4.2 CBO/CSR Approver

Action: In the **Required Access** section, choose **CBO/CSR** for **User Type**. (See Figure 30)

Access Request

User Type: MA/MA-PD/PDP/CC CBO/CSR COB

Justification for Access: *

Next Cancel

* indicates a required field

OMB: 0933-0989 Effective date: 5/06

Figure 30: Required Access Portion of Application Screen

The screen will refresh and display CBO/CSR related fields as shown in Figure 31.

The screenshot shows the 'Access Request' form with the following elements:

- User Type:** Radio buttons for MA/MA-PD/PDP/CC, CBO/CSR (selected), and COB.
- Role:** A dropdown menu with an asterisk indicating it is a required field.
- Call Center:** A dropdown menu showing '28th Avenue, Phoenix, AZ' and an 'Add' button.
- Justification for Access:** A large text area for providing justification.
- Buttons:** 'Next' and 'Cancel' buttons at the bottom left.
- Footnote:** '* indicates a required field' at the bottom right.
- Page Info:** 'OMB: 0938-0989' at the bottom left and 'Effective date: 5/06' at the bottom right.

Figure 31: CBO/CSR Related Fields Screen

Action: From the drop down list select **Approver** as your **Role**. (See Figure 32)

This screenshot shows the 'Access Request' form with the 'Role' dropdown menu open. The dropdown list contains two options: 'User' and 'Approver'. A red box labeled 'Select Role' is positioned above the dropdown, with a red arrow pointing to the 'Approver' option. The 'Call Center' dropdown remains at '28th Avenue, Phoenix, AZ'. The 'Justification for Access' text area is empty. The 'Next' and 'Cancel' buttons are visible at the bottom. The footer information is the same as in Figure 31.

Figure 32: CBO/CSR Role Drop Down List

Action: From the drop down list, select your **Call Center** then click **Add**. (See Figure 33).

Access Request

User Type: MAMA-PD/PDP/CC * CBO/CSR COB

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Call Center(s): 28th Avenue, Phoenix, AZ

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0933-0989 Effective date: 5/06

Figure 33: CBO/CSR Call Center Drop Down List for Approver

The screen refreshes and the selected Call Center is displayed just above the Justification field.

Action: Enter a brief statement for the **Justification**. This justification field must include a valid reason for access. (See Figure 34)

Action: Click on **Next** when you are done filling in all the required fields on the Application for Access screen.

Access Request

User Type: MAMA-PD/PDP/CC * CBO/CSR COB

Role: *

Call Center: Add

Please enter one call center at a time and click the button: Add.

Call Center(s): 28th Avenue, Phoenix, AZ

Justification for Access:

* indicates a required field

Next Cancel

OMB: 0933-0989 Effective date: 5/06

Figure 34: CBO/CSR Justification Field for Approver

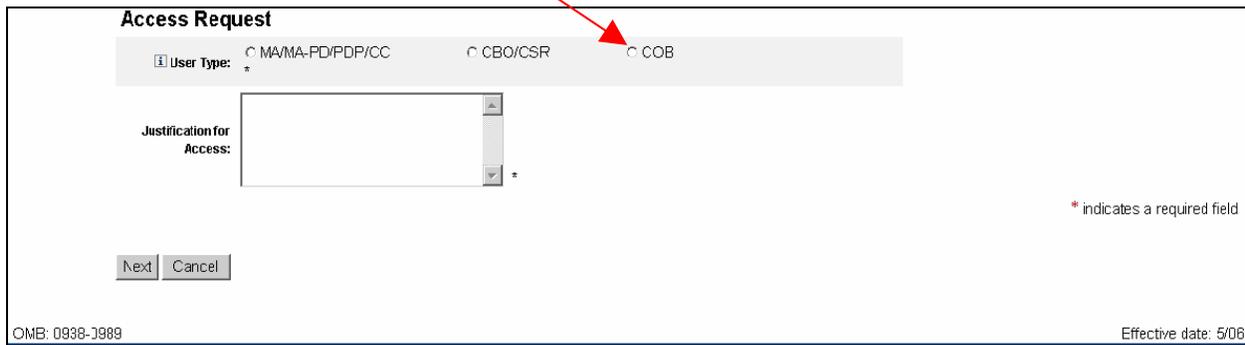
When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the Application for Access screen. The top part of the screen 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 the Privacy Act Statement for you to read. Go to **Section 2.5**—

Completion of Registration Process for the Privacy Act Statement acceptance procedure and the final registration screen.

2.4.3 COB Approver

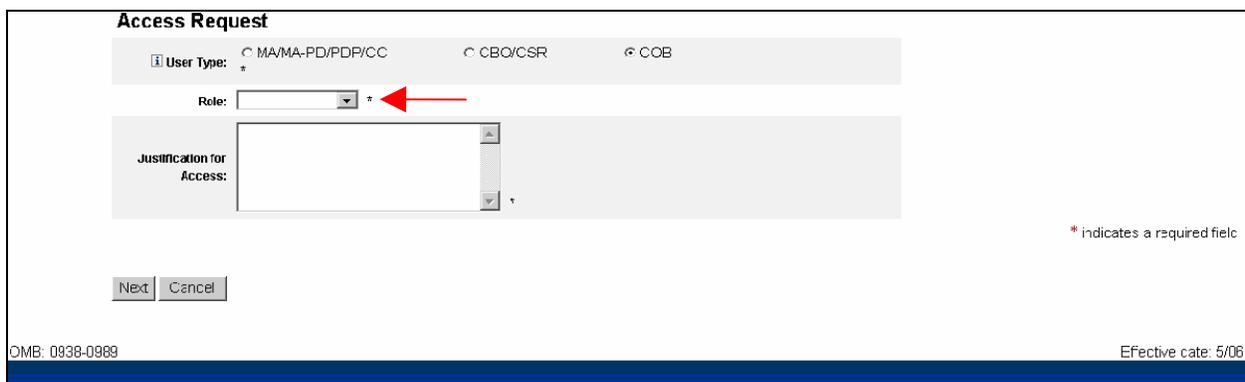
Action: In the *Required Access* section, choose **COB** for *User Type*. (See Figure 35)



The screenshot shows the 'Access Request' form. At the top, there are three radio button options for 'User Type': 'MA/MA-PD/PDP/CC', 'CBO/CSR', and 'COB'. 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. At the bottom right, a note states '* indicates a required field'. The footer contains 'OMB: 0938-0989' and 'Effective date: 5/06'.

Figure 35: Required Access Portion of Application Screen

The screen will refresh and display COB related fields as shown in Figure 36.



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

Figure 36: COB Related Field

Action: From the drop down list select **Approver** as your *Role*. (See Figure 37)

The screenshot shows the 'Access Request' form with the 'COB' radio button selected. The 'User Type' section has three options: MA/MA-PD/PDP/CC, CBO/CSR, and COB. The 'Role' dropdown menu is open, showing 'User/Transmitter' and 'Approver'. A red box labeled 'Select Role' points to the dropdown arrow. The 'Justification for Access' field is empty. At the bottom, there are 'Next' and 'Cancel' buttons. A footer note states '* indicates a required field'. The document ID 'OMB: 0938-0989' and 'Effective date: 5/06' are visible at the bottom.

Figure 37: COB Role Drop Down List

After the Approver role is selected, the screen will refresh and will be displayed as shown in Figure 38.

Action: Enter a brief statement for the **Justification**. 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 Application for Access screen.

The screenshot shows the 'Access Request' form with the 'Approver' role selected in the 'Role' dropdown. The 'Justification for Access' field is empty. A red arrow points to the 'Next' button. A footer note states '* indicates a required field'. The document ID 'OMB: 0938-0989' and 'Effective date: 5/06' are visible at the bottom.

Figure 38: COB Justification Field for Approver

When you click on **Next**, the system will validate the data you have entered in each of the fields on the Application for Access screen. If there is any invalid data or there are any mandatory fields not filled in, the system will redisplay the Application for Access 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 the Privacy Act Statement for you to read. Go to **Section 2.5—Completion of Registration Process** for the Privacy Act Statement acceptance procedure and the final registration screen.

2.5 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 screen is shown in Figure 39.

U.S. Department of Health & Human Services www.hhs.gov

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Review Registration Details

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**.

First Name:	Test	MI:	A	Last Name:	Planner
Social Security Number:	324-67-8932				
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				

OMB: 0938-0989 Effective date: 5/06

Figure 39: 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 Privacy Act Statement screen will open as shown in Figure 40.

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 Portal 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 Portal screen.

U.S. Department of Health & Human Services

www.hhs.gov

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

Terms and Conditions

CMS Computer Systems Security Requirements

PRIVACY ACT STATEMENT

The information on the web form is collected and maintained under the authority of Title 5 U.S. Code, Section 552a(e) (10) (The Privacy Act of 1974). 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 (CMS) Data Center Systems of Records and may be disclosed as a routine use disclosure under the routine uses established for this system as published at 59 FED. REG. 41329 (08-11-94) and as CMS may establish in the future by publication in the Federal Register.

To continue, you must accept the terms and conditons. If you decline, your registration will automatically be cancelled.

I Accept the above Terms and Conditions

OMB: 0938-0989 Effective date: 5/06

Figure 40: Privacy Act Statement Screen

When you check the “I Accept the above Terms and Conditions” box and click **I Accept** in the Privacy Act Statement screen, the system will display a Registration Acknowledgement screen as shown in Figure 41.

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.

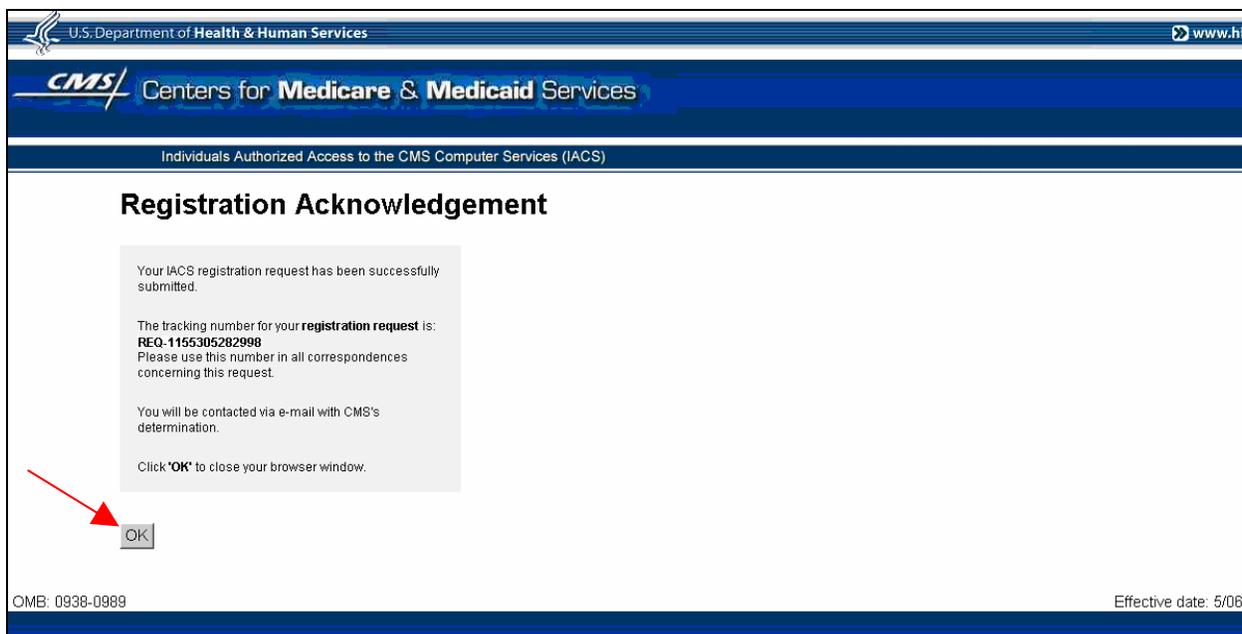


Figure 41: Registration Acknowledgement Screen

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 Registration Access Selection 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 an email notification is not received within 24 hours after you register, please contact the applicable Help Desk for your user community. Figure 42 presents an example of the email providing your Request Number.

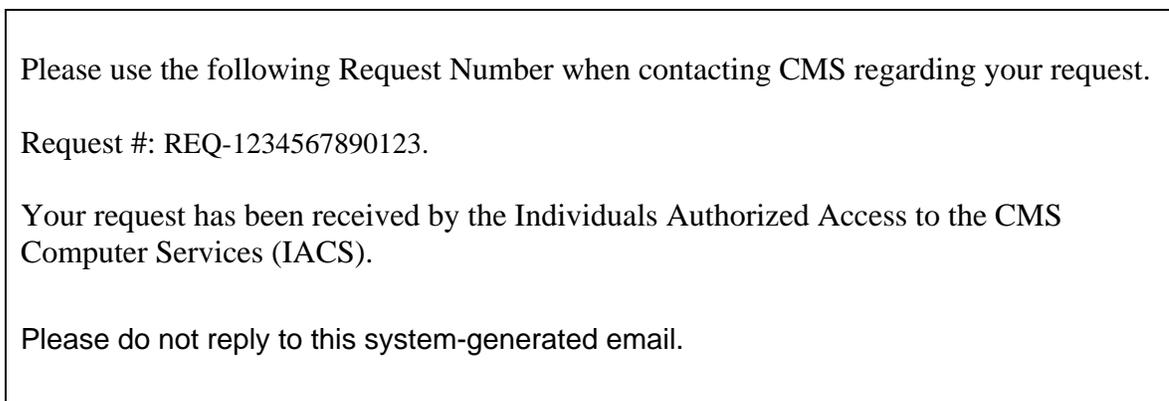


Figure 42: Example of Request Number Email

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.

The procedure for “Logging in for the First Time” is presented in Section **2.6 - Logging in for the First Time**.

Figure 43 presents an example of the email providing your Global User Identifier (GUID).

Figure 44 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 Global User Identifier: (GUID)

Thank you,

IACS

Please do not reply to this system-generated email.

Figure 43: Example of GUID Email

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. Follow the links to the main IACS page.

Select “Registered User Login”

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

Thank You,

IACS

Please do not reply to this system-generated email.

Figure 44: 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 45 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 45: Example of a Request Denial Email

2.6 Logging in for the First Time

Action Using the Global User Identifier (GUID) and onetime password provided, login to the IACS system at <https://applications.cms.hhs.gov> to change your password.

Action: Read the government computer system WARNING, and then agree by clicking **Enter**. (See Figure 1)

The CMS Application Portal Links screen will open as shown in Figure 46

Action: Click on **Account Management** on the left sidebar.

Centers for Medicare & Medicaid Services
Portal Home | CMS | FAQs | Feedback

CMS Applications Portal

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 Service** - Data Services for internal CMS users

Please refer to the links on the left panel and select a service to continue.

FOIA | Help | Email Updates | CMS Careers
Health and Human Services | Medicare.gov | FirstGov

Centers for Medicare & Medicaid Services
7500 Security Boulevard, Baltimore MD 21244-1850
[CMS Telephone Numbers](#)

Figure 46: CMS Application Portal Screen

The screen will update to the display shown in Figure 47.

Action: Click on **My Profile** in the CMS Applications Portal Links screen.



Figure 47: Registration Access Selection Screen

The “Login to IACS” screen will open as shown in Figure 48.

Action: Enter your new *User ID*

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

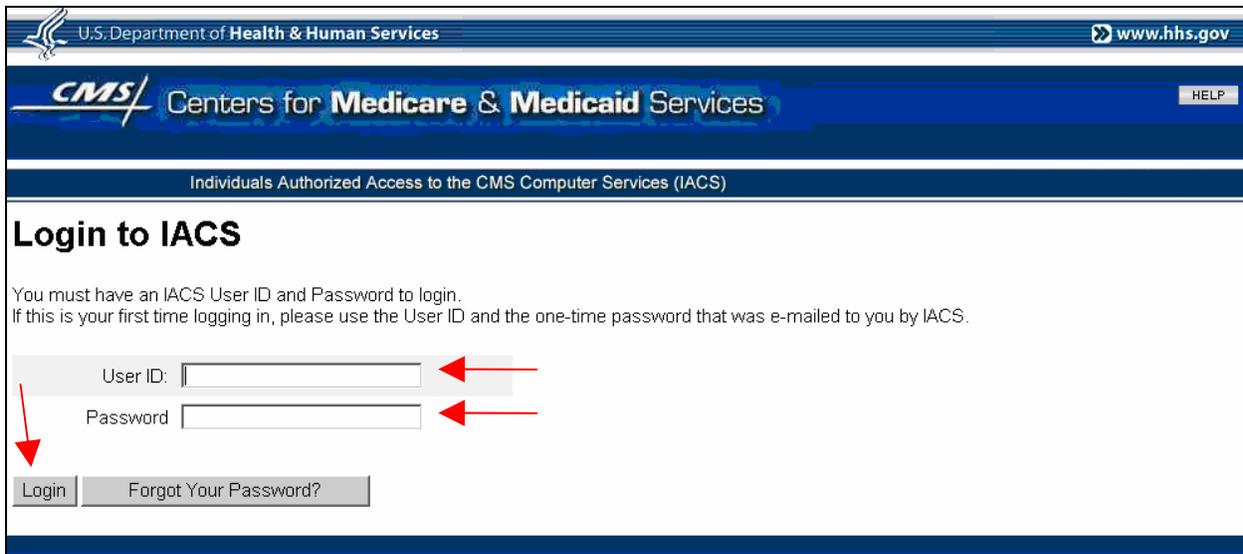


Figure 48: Log In to IACS Screen

A **Change Password** window will open as shown in Figure 49.

Action: Enter a new **Password** in the **Password** field and then re-enter it in the **Confirm Password** field as verification.

Note: This screen also appears when the appropriate Help Desk processes a user-requested password reset

Figure 49: Change Password Field Entry Screen

The IACS password must meet the following policy rules:

- Must be 8 characters in length
- Must contain at least two alpha characters and one number (no special characters)
- Alpha characters must be mixed case (i.e., must have at least one upper case letter and one lower case letter)
- Cannot begin with a number
- Must not have more than 4 consecutive characters of any of the past 6 passwords
- Must not contain the UID
- Must be different from the previous 6 passwords

Action: Click on **Change password**.

Note: If the **Change Password** screen reappears, a password policy violation has occurred. Check the message that appears below the **Change Password** label and process accordingly. (See Figure 50)

Possible password policy violation messages:

- New password cannot match any of the 6 previous passwords for this account
- Fields **Confirm Password:** and **Password:** do not match
- Must have at least 2 alpha characters
- Must have at least 1 upper case and 1 lower case alpha character
- Must have at least 1 numeric character
- Cannot begin with a number
- Must be 8 characters in length

The screenshot shows the 'Change Password' interface in the CMS system. At the top, there is a navigation bar with the U.S. Department of Health & Human Services logo, the CMS logo, and the text 'Centers for Medicare & Medicaid Services'. Below this is a sub-header 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'Change Password'. A message states: 'To change your password, enter and confirm a new password in the fields below, and then click **Change Password**.' Below this, a red error message reads: 'Password does not comply with CMS Password Policy. Minimum length is 8. New password cannot contain more than 4 characters in sequence that are in any of the 6 previous passwords for this account.' A red arrow points to the word 'Change' in the instruction above. There are two input fields: 'New Password' and 'Confirm New Password'. Below the fields is a section titled 'CMS Password Policy' with a list of requirements: '- The password must be changed at least every 60 days.', '- The password must be 8 characters long.', '- The password must contain at least 2 letters and 1 number.', '- Letters must be mixed case (i.e., your password must have at least 1 upper case letter and 1 lower case letter).', '- The password must not contain your user UID.', '- The password must not contain 4 consecutive characters from any of your previous 6 passwords.', '- The password must be different from your previous 6 passwords.' At the bottom of the form are two buttons: 'Change Password' and 'Cancel'. The footer of the page includes a 'Logout' link on the left and 'Logged in as: CSRL111' on the right.

Figure 50: Change Password Policy Violation Message Screen

In addition:

- The password must be changed at least every 60 days
- The password must not contain a user's UID
- The password must not contain 4 consecutive characters from any of the previous 6 passwords
- The password must be different from the previous 6 passwords
- The password must not contain a reserved word: PASSWORD, WELCOME, CMS, HCFA, SYSTEM, MEDICARE, MEDICAID, TEMP, LETMEIN, GOD, SEX, MONEY, QUEST, 1234, F20ASYA, RAVENS, REDSKIN, ORIOLES, BULLETS, CAPITOL, MARYLAND, TERPS, DOCTOR, 567890, 12345678, ROOT, BOSSMAN, JANUARY, FEBRUARY, MARCH, APRIL, MAY, JUNE, JULY, AUGUST, SEPTEMBER, OCTOBER, NOVEMBER, DECEMBER, SSA, FIREWALL, CITIC, ADMIN, UNISYS, PWD, SECURITY, 76543210, 43210, 098765, IRAQ, OIS, TMG, INTERNET, INTRANET, EXTRANET, ATT, LOCKHEED

Once your password has been successfully changed, you'll be asked to answer at least two (2) authentication questions. Your answers will be used in the future in the event you forget your password. (See Figure 51) If you do not answer at least two of the authentication questions, you may not be allowed access to the system if you forget your password.

Action: Click on ***Change Answers to Authentication Questions***.

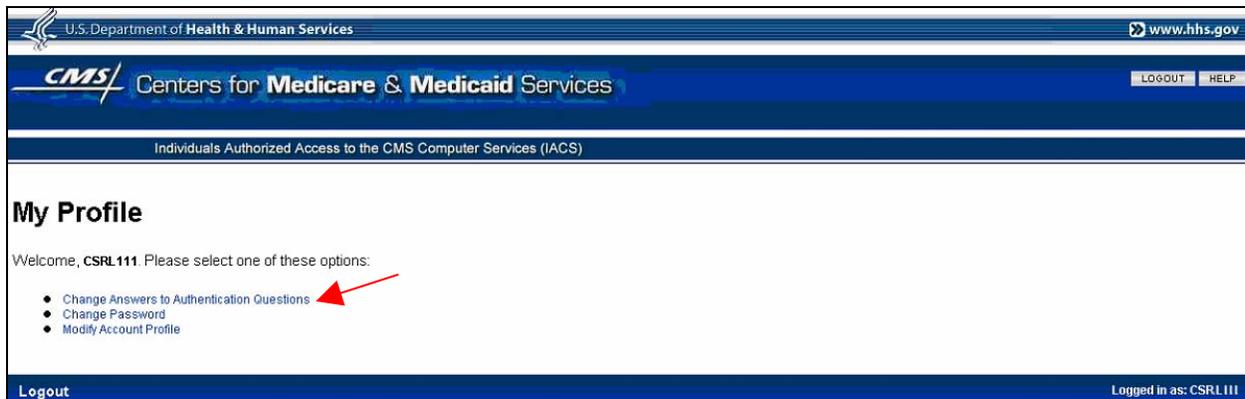


Figure 51: Change Answers to Authentication Questions Selection Screen

Action: Answer at least two (2) of the ten (10) **Authentication Questions**. (See Figure 52)

Change Answers to Authentication Questions

If you forget your password, the system will prompt you for the answers to all authentication questions associated with your account. Enter new answers to one or more of the following questions, and then click **Save**.

Authentication Questions

Please answer at least 2 of the following questions.

What city were you born in?

What year did you graduate from high school?

What is your favorite sport?

What is the make of your first car?

What is the color of your first car?

What is your mothers' maiden name?

What is the name of your first pet?

What size shoe do you wear?

What is your favorite season of the year?

What is your favorite movie?

Logout Logged in as: CSRLIII

Figure 52: Change Answers to Authentication Questions Screen

Action: Click **Save** when you have finished answering the questions you want to answer. The question answer results will be displayed as shown in Figure 53.

Action: Click **OK** when you have finished viewing your questions.

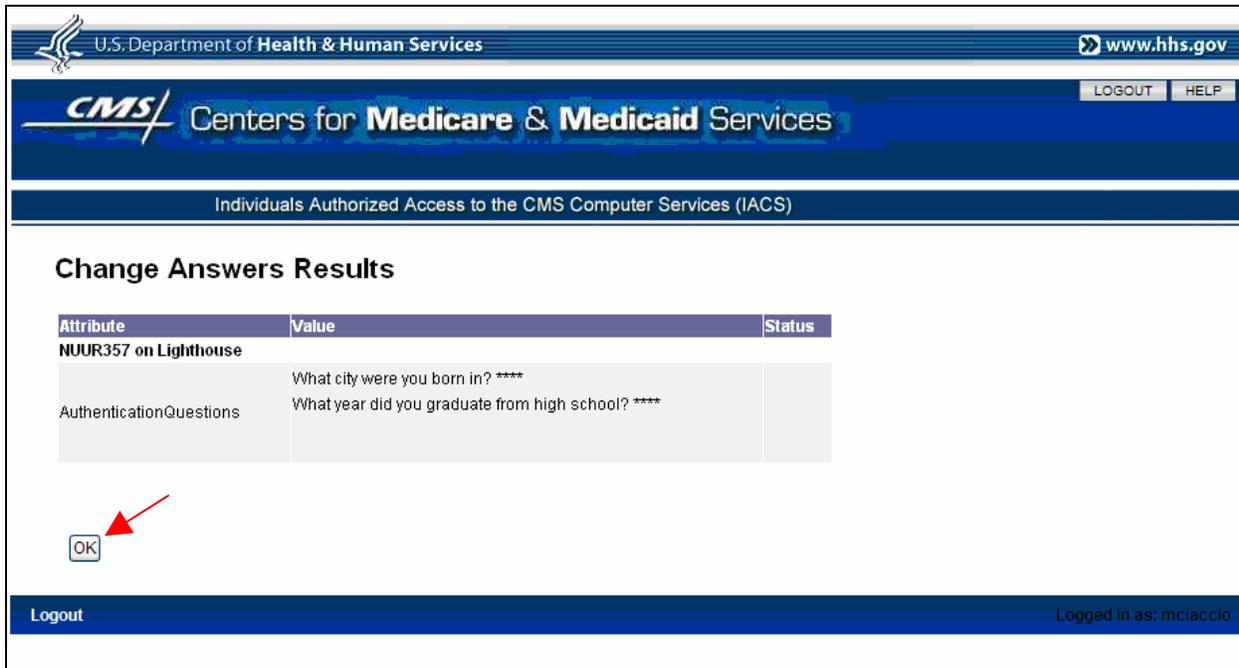


Figure 53: Change Answers Results Screen

Note: After the initial login, the *Change Password* and *Change Answers to Authentication Questions* options only need to be selected if you want to change those values. (See Figure 54)

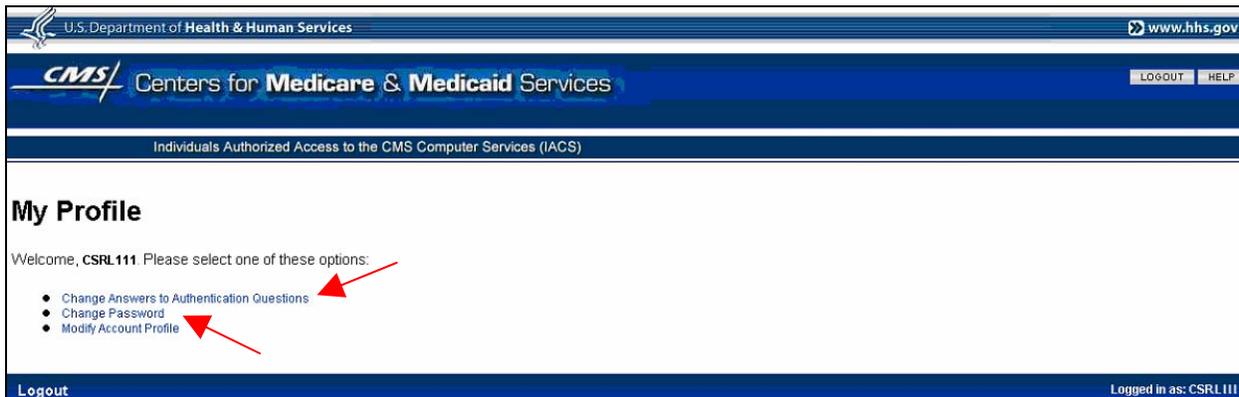


Figure 54: My Profile Screen

3.0 Additional IACS Procedures

3.1 Password Reset

When you want to log in to IACS, you are required to enter your User ID and Password in a screen such as that shown in Figure 55.

If you enter your password incorrectly three (3) times, the system will lock your account and it can only be reset by Admin. While your account is locked, you cannot access any other features.

If you know you have forgotten your Password, enter your User ID and click on ***Forgot Your Password?***

NOTE: After a third failed login attempt, your account will be locked as stated above and you will not be able to access the “Forgot Your Password” functionality. You must then contact the appropriate Help Desk to get an Admin to reset your password. When Admin resets your password, you will be sent an email with the temporary one-time password which you may then use to go in and change the password to one of your choice.

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Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

You must have an IACS User ID and Password to login.
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

User ID:

Password

Login Forgot Your Password?

Figure 55: Log In to IACS Screen

An **Identity User** screen will be displayed, similar to the example shown in Figure 56. Fields for the questions you answered during your initial login will be displayed. You must correctly answer at least two of the questions. If you incorrectly answer the questions three times in a row, your account will be locked. You must call the applicable Help Desk for your user community to have a system administrator unlock your account.

Action: Answer each question with the exact answer previously provided.

Action: Click on **Login**.

Figure 56: Password Identify User Screen

The Log In to IACS screen will reappear with a new message above the User ID field indicating that a one-time password has been emailed to you. (See Figure 57)

Figure 57: Password Email Notification Screen

Action: Go to your email and get your new password. This is a one-time password and you must change your password when you log in.

Action: Go to **Section 2.6 Logging in for the First Time**, 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.

3.2 Modify Registration

Occasionally you may want to modify your existing CMS access registration profile. This can involve adding contract numbers, organization numbers, or call centers 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.

You begin the registration modification process by first logging in to IACS. (See Figure 58)

Action: Enter your **User ID**

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

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Individuals Authorized Access to the CMS Computer Services (IACS)

Login to IACS

You must have an IACS User ID and Password to login.
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

User ID:

Password:

Figure 58: Log In to IACS Screen

A **My Profile** screen will be displayed as shown in Figure 59.

Action: Select **Modify Registration**.

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Individuals Authorized Access to the CMS Computer Services (IACS)

My Profile

Welcome, **CSRL111**. Please select one of these options:

- Change Answers to Authentication Questions
- Change Password
- **Modify Account Profile**

[Logout](#) Logged in as: CSRL111

Figure 59: My Profile – Modify Registration Option

A **Modify Registration** 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 Registration screen is shown in Figure 60.

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Individuals Authorized Access to the CMS Computer Services (IACS)

Modify Account Profile

User Information

User ID:

First Name: MI: Last Name:

Email Address:

Office Telephone:

Company Name: Company Telephone:

Address 1: Address 2:

City: State: Zip Code:

Figure 60. Example of User Information Fields in Modify Registration

In the **Required Access** portion of the registration screen, information specific to your User Type and Role will be displayed.

The screens for each User Type/Role that allow you to change registration information are displayed and described in the following sections:

- Section 3.2.1 MA/MA-PD/PDP/CC
- Section 3.2.2 CBO/CSR
- Section 3.2.3 COB

You may go directly to the section of interest to you for instructions on modifying the Required Access information.

3.2.1 MA/MA-PD/PDP/CC

If you are a User Type of **MA/MA-PD/PDP/CC** and your Role is that of **User/Submitter**, the Required Access portion of the Registration Modification screen will appear as shown in the example in Figure 61. The screens for the **User/Representative** role and the **Approver** role will be similar to the one shown in Figure 61 except the value for the Role field will reflect the different roles. It is not possible to change roles using the Modify Registration option. If you must change your role, contact the appropriate Help Desk for assistance.

The screenshot displays the IACS Modify Registration screen for the MA/MA-PD/PDP/CC user type. At the top, the User Type is set to MA/MA-PD/PDP/CC and the Role is User/Submitter. Below this, there are three input fields for adding new items: Plan Contract Number, PDE Mailbox Number, and RAPS Mailbox Number, each with an 'Add' button. The main section contains three 'Modify' panels: 'Modify Plan Contracts', 'Modify PDE Mailboxes', and 'Modify RAPS Mailboxes'. Each panel has two columns: 'Existing Contracts and Selected Contract' and 'Contracts to Remove'. The 'Existing Contracts and Selected Contract' column contains the value 'H0150'. Between the columns are four arrow buttons: a right-pointing arrow (>), a left-pointing arrow (<), a double right-pointing arrow (>>), and a double left-pointing arrow (<<). Below the 'Modify RAPS Mailboxes' panel is a 'Justification for Access' field with a small asterisk (*) indicating it is required. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, a note states '* indicates a required field'.

Figure 61: IACS Modify Registration Screen - MA/MA-PD/PDP/CC

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

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

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

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

Action: In the **Modify Contracts/Mailboxes** field areas, within the “Existing Contracts and Selected Contracts” area select the **Contract Number** to be removed

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

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

If you want to move all Contract Numbers in the “Existing Contracts and Selected Contracts” area to the “Contracts 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 Contract Numbers in the “Contracts to Remove” area back to the “Existing Contracts and Selected Contracts” 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**. 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 62. You must click on the “OK” button to complete the modify registration process. If you select the “Cancel” button, your modify registration process will be cancelled and any changes you made to your profile will be lost.

Action: Click on **OK**.



Figure 62. Final Modify Registration Screen

After Registration Modification

You will be sent an email confirming that IACS has received your request and giving you a Request Number. (Refer to Figure 42 for an example of this email and the Request Number format.) 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 Contracts does not require approval.

3.2.2 CBO/CSR

If you are a User Type of **CBO/CSR** and your Role is that of **User** the Required Access portion of the Registration Modification screen will appear as shown in the example in Figure 63. The screen for the Approver role will be similar to the one shown in Figure 63 except the value for the Role field will reflect the different role.

The screenshot displays the IACS Modify Registration Screen for a CBO/CSR user. At the top, the 'User Type' is set to 'CSR' and the 'Role' is 'User'. The 'Call Center' field contains '28th Avenue, Phoenix, AZ' with an 'Add' button next to it. A blue instruction reads: 'Please enter one call center at a time and click the button: Add.' Below this is the 'Modify Call Centers' section, which is divided into two panes: 'Existing Call Centers and Selected Call Ce' and 'Call Centers to Rer'. The 'Existing' pane lists '28th Avenue, Phoenix, AZ', 'Corbin, KY', and 'Sitel, Savannah, GA'. Between the panes are four arrow buttons: a single right arrow (>), a single left arrow (<), a double right arrow (>>), and a double left arrow (<<). Below the panes is a 'Justification for Access' text area with an asterisk (*) indicating it is a required field. At the bottom left are 'Next' and 'Cancel' buttons. The footer contains 'Logout', 'OMB: 0938-0989', 'Effective date: 5/06', and 'Logged in as: GGGG222'.

Figure 63: IACS Modify Registration Screen – CBO/CSR

If you want to add a new Call Center to your current list of Call Centers, do the following:

Action: Select the **Call Center** and click on **Add**.

If you want to add another Call Center, repeat the Action stated above.

If you want to remove one or more Call Centers, do the following:

Action: In the **Modify Call Center** field area, within the “Existing Call Center” area select the **Call Center** to be removed.

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

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

If you want to move all Call Centers in the “Existing Call Center” area to the “Call Center 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 Call Centers in the “Call Center to Remove” area back to the “Existing Call Center” 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**. 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 64. You must click on the “OK” button to complete the modify registration process. If you select the “Cancel” button, your modify registration process will be cancelled and any changes you made to your profile will be lost.

Action: Click on **OK**.

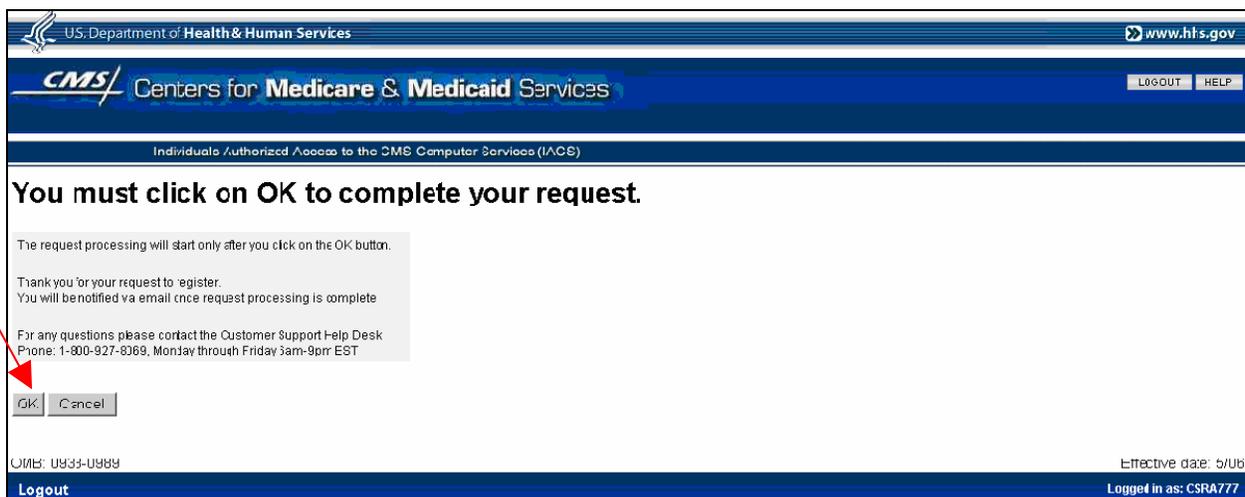


Figure 64. Final Modify Registration Screen

After Registration Modification

You will be sent an email confirming that IACS has received your request and giving you a Request Number. (Refer to Figure 42 for an example of this email and the Request Number format.) 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 Call Centers does not require approval.

3.2.3 COB

If you are a User Type of **COB** and your Role is that of **User/Transmitter** the Required Access portion of the Registration Modification screen will appear as shown in the example in Figure 65. The screen for the Approver role will be similar to the one shown in Figure 65 except the value for the Role field will reflect the different role.

Figure 65: IACS Modify Registration 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**. 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 66. You must click on the “OK” button to complete the modify registration process. If you select the “Cancel” button, your modify registration process will be cancelled and any changes you made to your profile will be lost.

Action: Click on **OK**.



Figure 66. Final Modify Registration Screen

After Registration Modification

You will be sent an email confirming that IACS has received your request and giving you a Request Number. (Refer to Figure 42 for an example of this email and the Request Number format.) 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.

4.0 Questions and Troubleshooting

4.1 *Help*

For questions regarding the IACS system, please read the FAQ page at:

<http://www.cms.hhs.gov/MMAHelp/downloads/IACSFags.pdf>

Answers to many commonly asked questions can be found on this web site. If you have further questions, please call the applicable Help Desk for your user community.

4.2 *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.

5.0 Helpful Hints

5.1 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. This email address should be a corporate email address. Do not use publicly available email services such as yahoo or hotmail.
2. When entering Contract Numbers, Call Centers, or Organization Numbers, you need to hit the **Add** button after each and every contract number is entered. Do not enter all contracts on one line.
3. When entering contract numbers include the initial character (i.e. S/H/R/E/9); contract numbers should be 5 characters.
4. Organization Numbers should be 5 characters.
5. 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.
6. Once a user completes their registration in IACS, the EPOC will receive an email prompting them to approve the user. Follow up with your plan's EPOC(s) to ensure this step is completed.
7. Contract Number, Call Center, and Organization Number removals are not routed for approval.
8. User IDs will not be issued until approvals/rejections are completed for all contracts entered – and there may be separate approvers for different contract numbers.
9. Only one set of *additional* contract numbers can be pending at one time; that is, if you register, then go back into the system and enter additional contract numbers, wait until all of the approvals/rejections are processed for the original set and the additional contracts before adding more contract numbers.
10. If you have not received an email with a confirmation of your request within 24 hours of registration and you are sure that your EPOC(s) has completed the approval process, please call the applicable Help Desk for your user community.
11. 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.

5.2 *Logging in for the First Time*

After registration is complete and the user logs in for the first time

- The user must change his/her password
- The user must answer at least two (2) of the authentication questions (until that is done, s/he will not see any additional links - such as waiting approvals)
- The *change password* and *change authentication* links that appear after the first login and authentication question setup provide the user with the option of changing those values – they are not mandatory

5.3 *Calls to MMA Help Desk*

For all calls to the MMA Help Desk, please provide the following information to expedite handling of the call:

- Your name
- Your email address
- Your phone number
- Your company name including the name of the servicing company if you are a subcontractor.
- Your Contract Number/s (if MA/MA-PD/PDP/CC)
- Your COBA/VDSA number/s (if COB)
- Your call center location (if CBO/CSR)
- Your Request Number if you are calling about an Access Request issue.
- Other information you think may help.

6.0 Legal

6.1 *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.

6.2 *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.

7.0 Acronyms

This section defines acronyms used in this document.

Acronym	Definition
CBO	Community Based Organization
CC	Cost Contract
CMS	the Centers for Medicare & Medicaid Services
COB	Coordination of Benefits
COBA	Coordination of Benefits Agreement
CSMM	Customer Service for Medicare Modernization
CSR	Customer Service Representative
EPOC	External Point of Contact
EUA	End User Administration
FAQ	Frequently Asked Questions
GUID	Global User Identifier
HPMS	Health Plan Management System
IACS	Individuals Authorized Access to CMS Computer Systems
ID	Identification
MA	Medicare Advantage
MA-PD	Medicare Advantage – Prescription Drug
MARx	Medicare Advantage Prescription Drug
MBD	Medicare Beneficiary Database
MMA	Medicare Modernization Act
PDE	Prescription Drug Event
PDP	Prescription Drug Plan
RACF	Resource Access Control Facility
RAPS	Risk Adjustment Processing System
SSN	Social Security Number
VDSA	Voluntary Data Sharing Agreement