

# **Individuals Authorized Access to CMS Computer Services (IACS)**

## **User Guide**

**DRAFT**

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## 1.0 Introduction

### 1.1 Purpose

This document establishes the procedures for registering and provisioning end-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** – 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.

## 1.4 *How to Use this document*

The main body of this document provides screens and procedures that are common to all IACS users. This includes such things as:

- Accessing the Self-Registration screen/s
- Completing the “User Information” portion of the Self-Registration screen
- Accepting or Declining the Privacy Act Statement
- Completing the Registration process
- Logging in for the first time
- Changing passwords
- Password reset.

Screens and procedures that are particular to specific applications accessed through IACS are provided in separate attachments to this document. This includes such things as:

- Completing the “Required Access” portion of the Self-Registration screen for End-Users and Approvers as well as other roles as required
- Modifying registration by adding or deleting selected information items after the initial registration has been approved and provisioned.

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 has been reorganized in order to better accommodate the addition of new application interfaces to the IACS functionality. This version also incorporates redesigned CMS Application screens and new email templates used to communicate with IACS users.

## 2.0 Registration for CMS Application Access

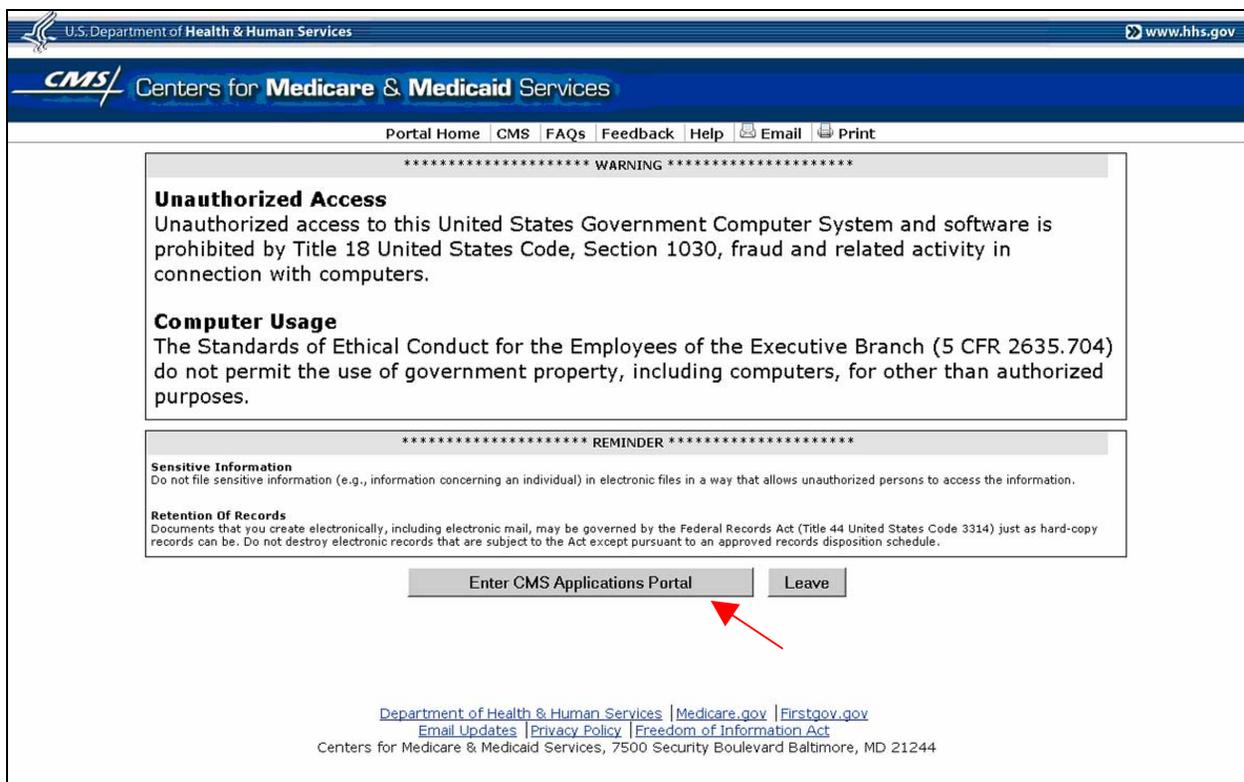
The following sub-sections provide step-by-step instructions on how to apply for access to CMS applications using the New User Registration procedures.

### 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**.

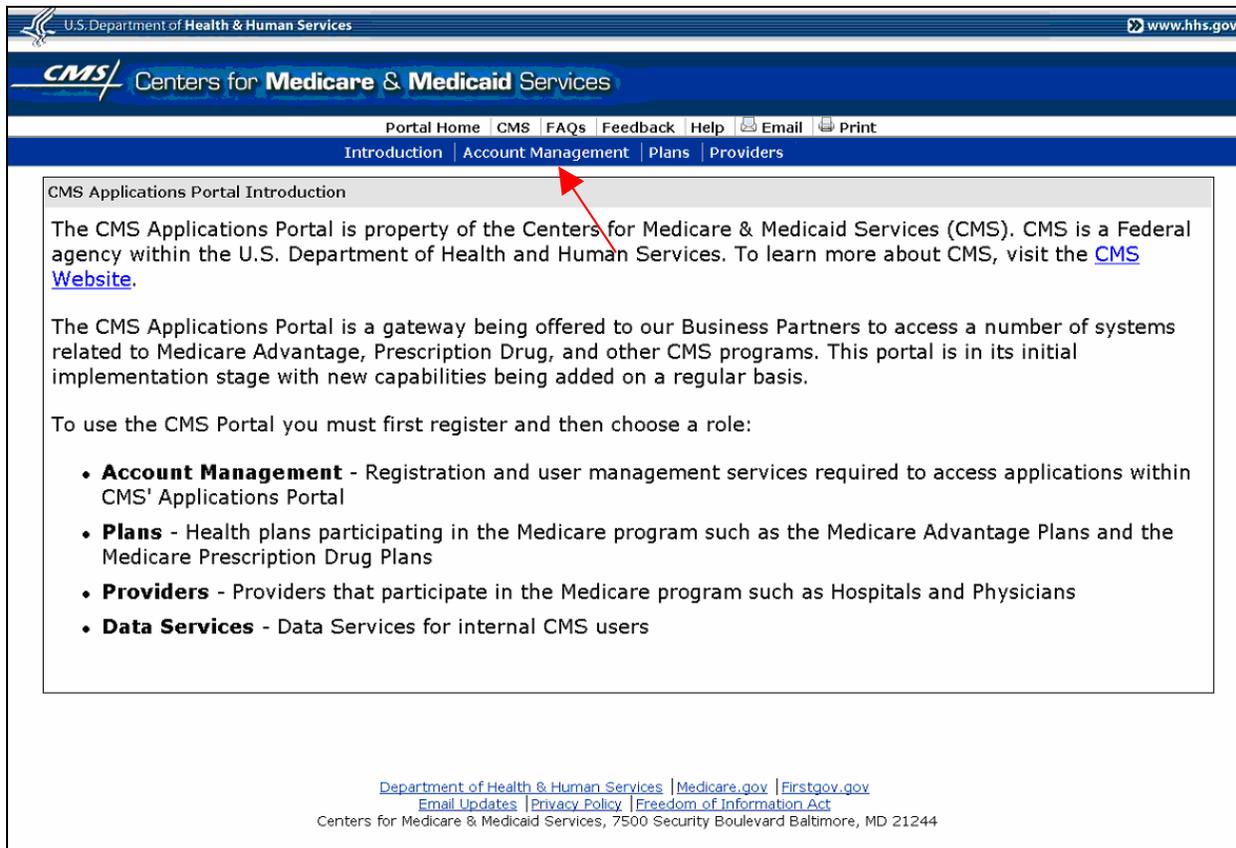


**Figure 1: Government Computer System Warning/Reminder Screen**

**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.

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for Medicare & Medicaid Services

Portal Home | CMS | FAQs | Feedback | Help | Email | Print

Introduction | Account Management | Plans | Providers

### Account Management

CMS has established a single system to provide user registration and user account self-service capabilities. The links below will launch the registration application for new users to request access to the applications offered within the CMS Applications Portal and the self-service application for registered users.

- [New User Registration](#) - Apply for a CMS computer services account
- [My Profile](#) - Manage your CMS computer services account
- [Computer Based Training \(CBT\) For Account Management](#)

### Help Resources

-Medicare Health Care Providers should direct questions or concerns to the MCARE Help Desk at 1-866-440-3805 (phone), 1-615-238-0822 (fax) or via email [MCARE@cms.hhs.gov](mailto:MCARE@cms.hhs.gov)

-Health Plans should direct questions or concerns to MMAHelp desk at 1-800-927-8069 or via email at [mmahelp@cms.hhs.gov](mailto:mmahelp@cms.hhs.gov)

Department of Health & Human Services | [Medicare.gov](http://Medicare.gov) | [Firstgov.gov](http://Firstgov.gov)  
[Email Updates](#) | [Privacy Policy](#) | [Freedom of Information Act](#)  
Centers for Medicare & Medicaid Services, 7500 Security Boulevard Baltimore, MD 21244

**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.

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](mailto:ssmith@yahoo.com), [mjordan@hotmail.com](mailto:mjordan@hotmail.com)).

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

### 2.3 Access Request Information for Users

The **Access Request** area of the "New User Registration" screen contains fields that are specific to each application provisioned through IACS. These fields, and the instructions for completing the fields, are presented in the attachments to this document as follows:

- Attachment A – MA/MA-PD/PDP/CC – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts
- Attachment B – CBO/CSR – Community Based Organization/Customer Service Representative
- Attachment C – COB – Coordination of Benefits – VDSA and COBA Organizations
- Attachment D – Provider (270/271)

These attachments provide sample screens and instructions for all users associated with a specific application. They give instructions on completing the "Access Request" portion of the "New User Registration" screen as well as instructions on modifying your account profile. Additionally, where applicable, these attachments provide instructions on how to access and log into your desired application once you are approved and provisioned in IACS.

**Action:** Proceed to the appropriate Attachment for instructions on how to complete the **Access Request** fields in the "New User Registration" screen.

## 2.4 Completion of Registration Process

When the data in all the "User Information" and "Access Request" 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 5.

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### 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**.

<b>First Name:</b>	Test	<b>MI:</b>	A	<b>Last Name:</b>	Planner
<b>Social Security Number:</b>	324-00-8932				
<b>E-mail:</b>	abcd@abdd.com				
<b>Office Telephone:</b>	324-367-8932x3245				
<b>Company Name:</b>	CMS	<b>Company Telephone:</b>	324-367-8932x3243		
<b>Address 1:</b>	7133 Rutherford	<b>Address 2:</b>	#250		
<b>City:</b>	Woodlawn	<b>State:</b>	MD	<b>Zip Code:</b>	21244-1234
<b>Role:</b>	Representative				
<b>Contract(s):</b>	H1010				

OMB: 0938-0989 Effective date: 5/06

**Figure 5: 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 6.

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.

U.S. Department of Health & Human Services

www.h

**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.](#)

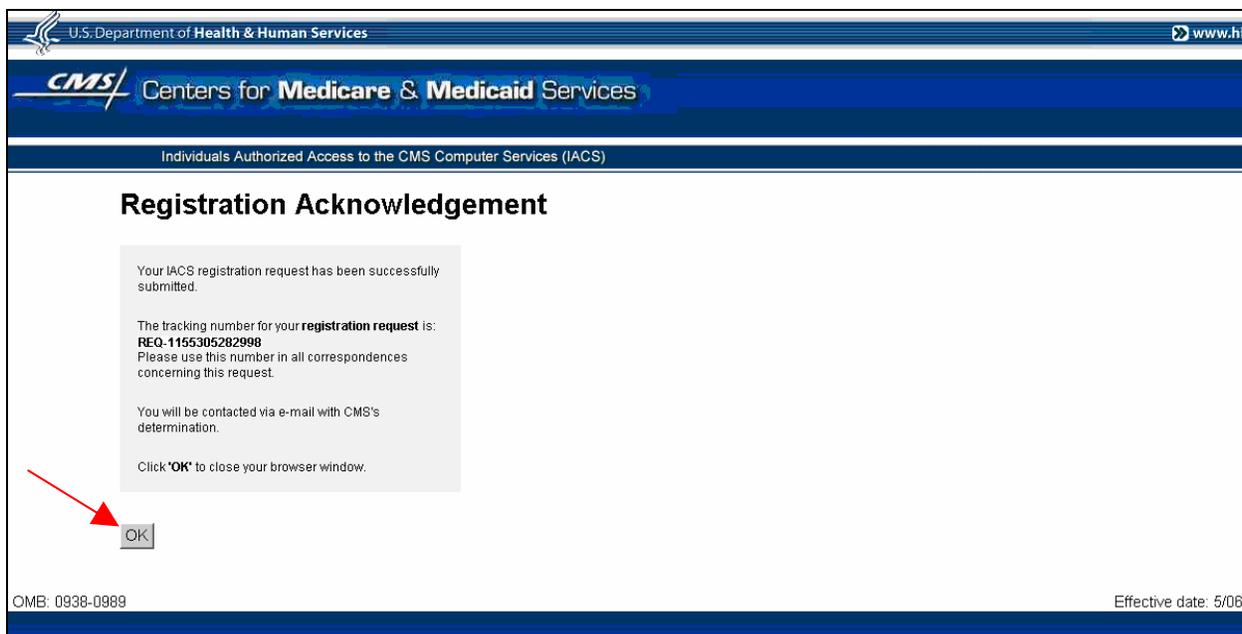
I Accept the above Terms and Conditions

OMB: 0938-0989 Effective date: 5/06

**Figure 6: Privacy Act Statement Screen**

When you check the “I Accept the above Terms and Conditions” box and click **I Accept** in the “Terms and Conditions” screen, the system will display a “Registration Acknowledgement” screen as shown in Figure 7.

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 7: Registration Acknowledgement Screen**

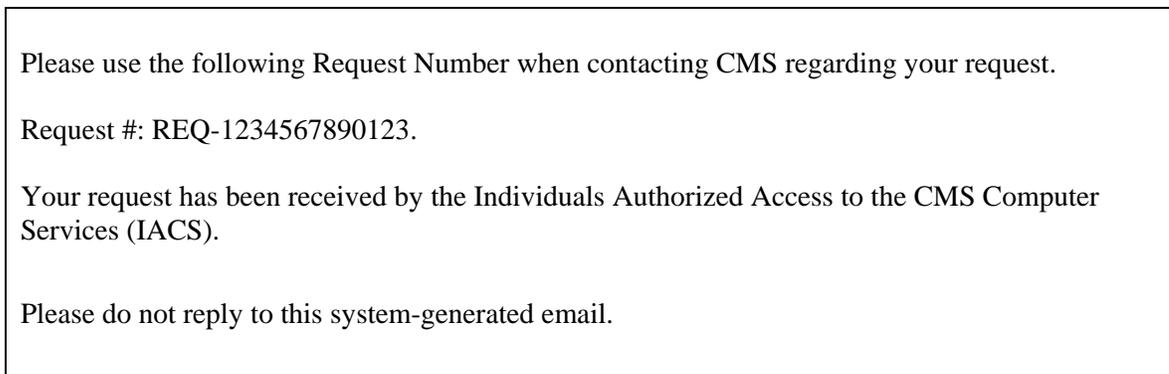
**Action** Click **OK**

**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 5.3 Help Desk Information**) Figure 8 presents an example of the email providing your Request Number.



**Figure 8: 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:** Go to **Section 2.5 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.

**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 9 presents an example of the email providing your User Identifier (UID).

Figure 10 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 9: 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 10: 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 11 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 11: 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 12 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 12: Example of a Request Cancellation Email**

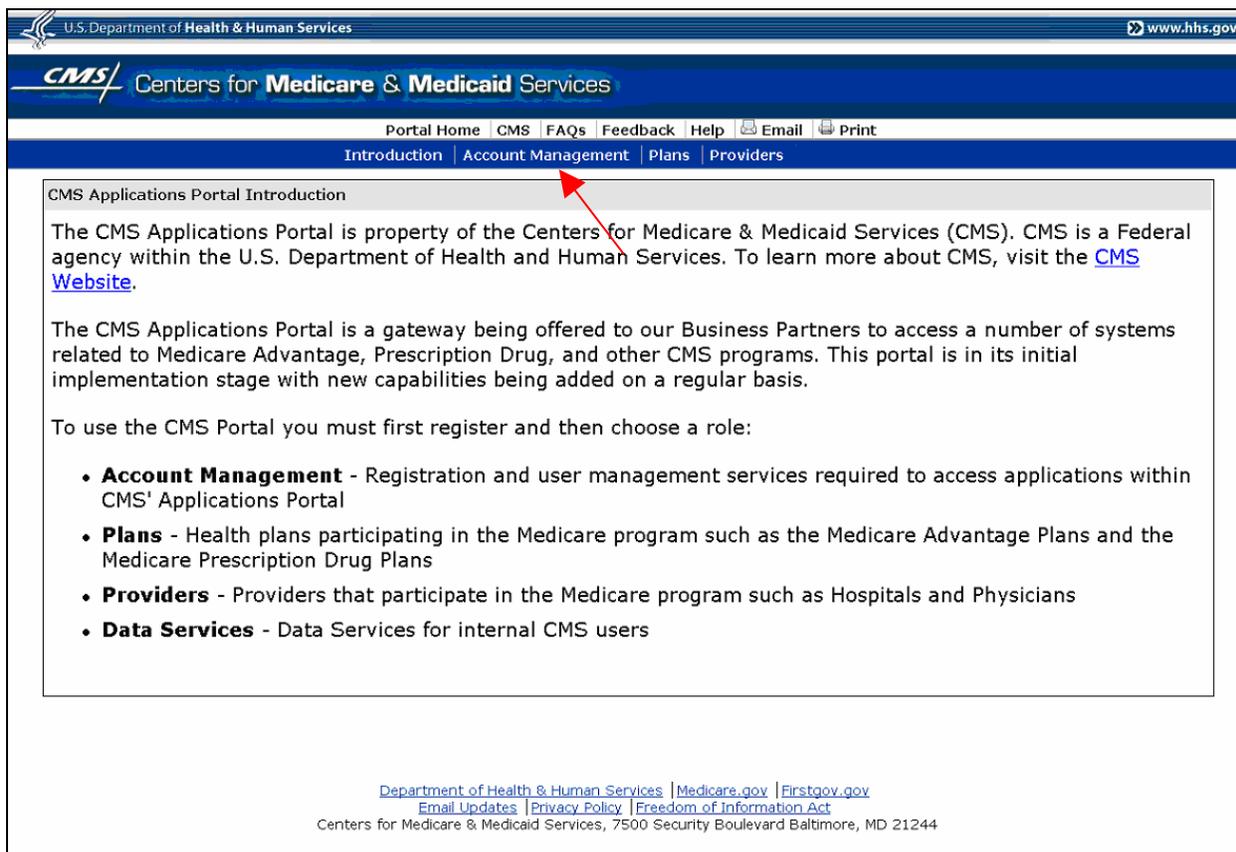
## 2.5 Logging in for the First Time

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

**Action:** Read the contents of the government computer system “WARNING/REMINDER” screen, and then agree by clicking **Enter CMS Applications Portal**. (See Figure 1)

The “CMS Application Portal Introduction” screen will open as shown in Figure 13

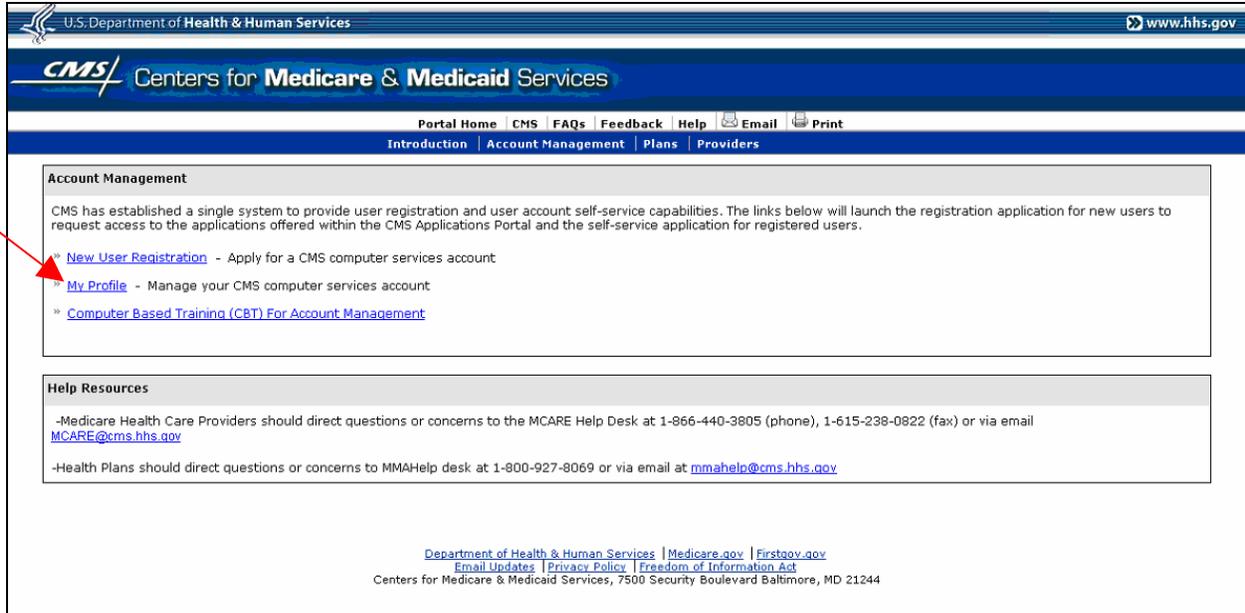
**Action:** Click on **Account Management** in the blue menu bar toward the top of the screen.



**Figure 13: CMS Application Portal Introduction Screen**

The screen will update to display the “Account Management” screen shown in Figure 14.

**Action:** Click on **My Profile** in the “Account Management” screen.

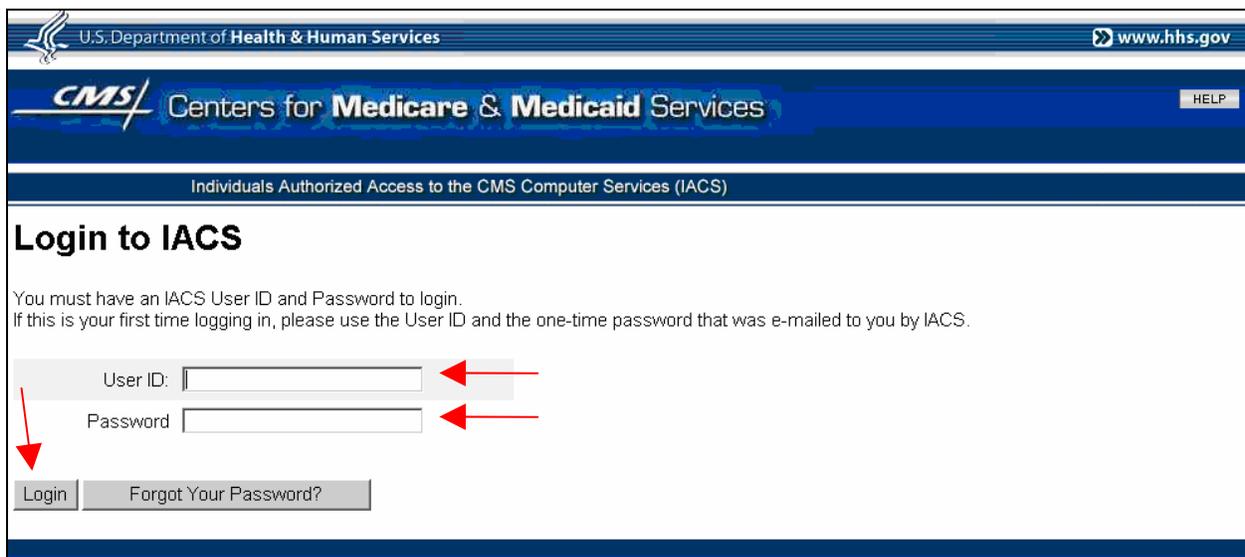


**Figure 14: Account Management Screen**

The “Login to IACS” screen will open as shown in Figure 15.

**Action:** Enter your new **User ID**

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



**Figure 15: Log In to IACS Screen**

A **Change Password** window will open as shown in Figure 16.

**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 as a result of a user requested password reset.

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Individuals Authorized Access to the CMS Computer Services (IACS)

## Change Password

To change your password, enter and confirm a new password in the fields below, and then click **Change Password**.

New Password

Confirm New Password

### CMS Password Policy

- 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.

[Logout](#) Logged in as: CSRL111

**Figure 16: 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

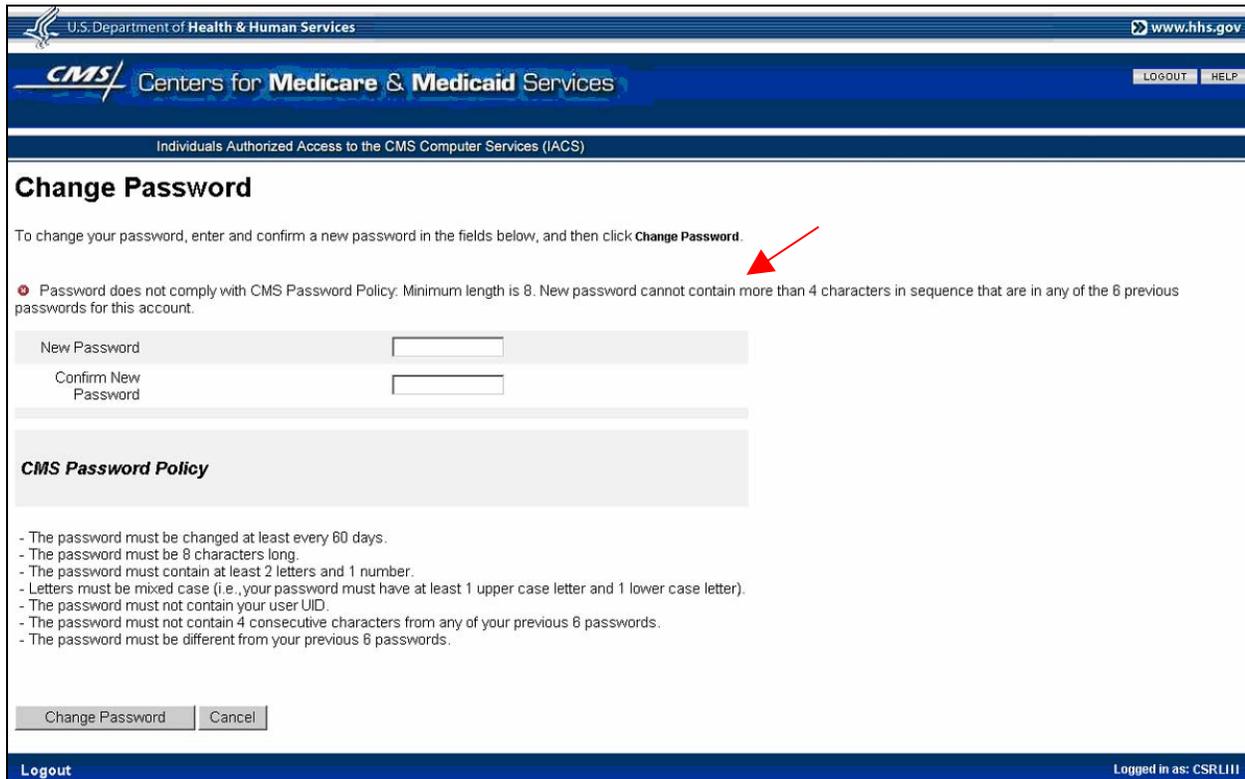
**Action:** Click on ***Change password.***

**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 17)

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 CMS web interface for changing a password. At the top, there is a header 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". Below the heading, there is a message: "To change your password, enter and confirm a new password in the fields below, and then click **Change Password**." A red arrow points to the "Change Password" link. Below this message, there is a red error message: "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." Below the error message, there are two input fields: "New Password" and "Confirm New Password". Below the input fields, there 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, there are two buttons: "Change Password" and "Cancel". The footer of the page contains "Logout" on the left and "Logged in as: CSRLIII" on the right.

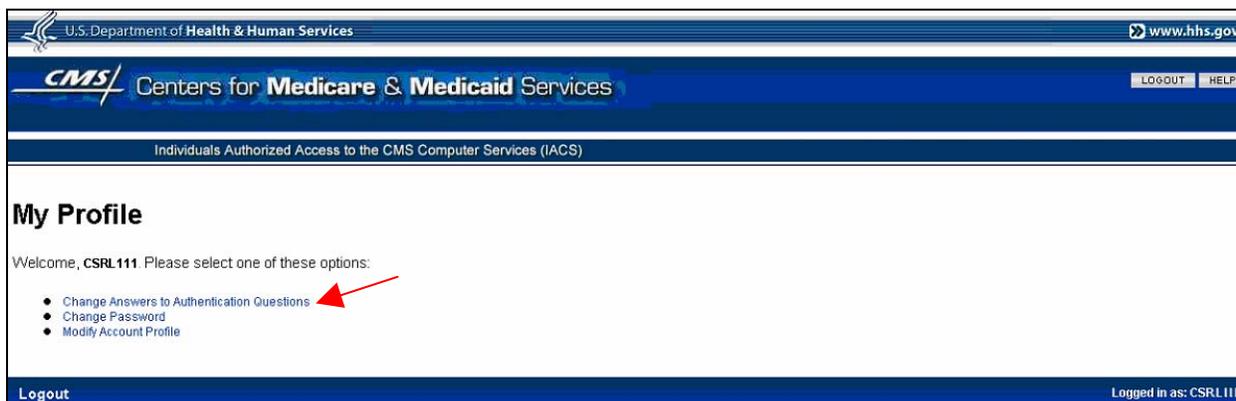
Figure 17: Change Password Policy Violation Message Screen

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 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 18) You must answer at least two of the authentication questions. If you do not, you may not be allowed access to the system if you forget your password.

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



**Figure 18: My Profile Screen Showing Change Answers to Authentication Questions Option**

**Action:** Answer at least two (2) of the ten (10) **Authentication Questions**. (See Figure 19)

**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 19: 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 20.

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

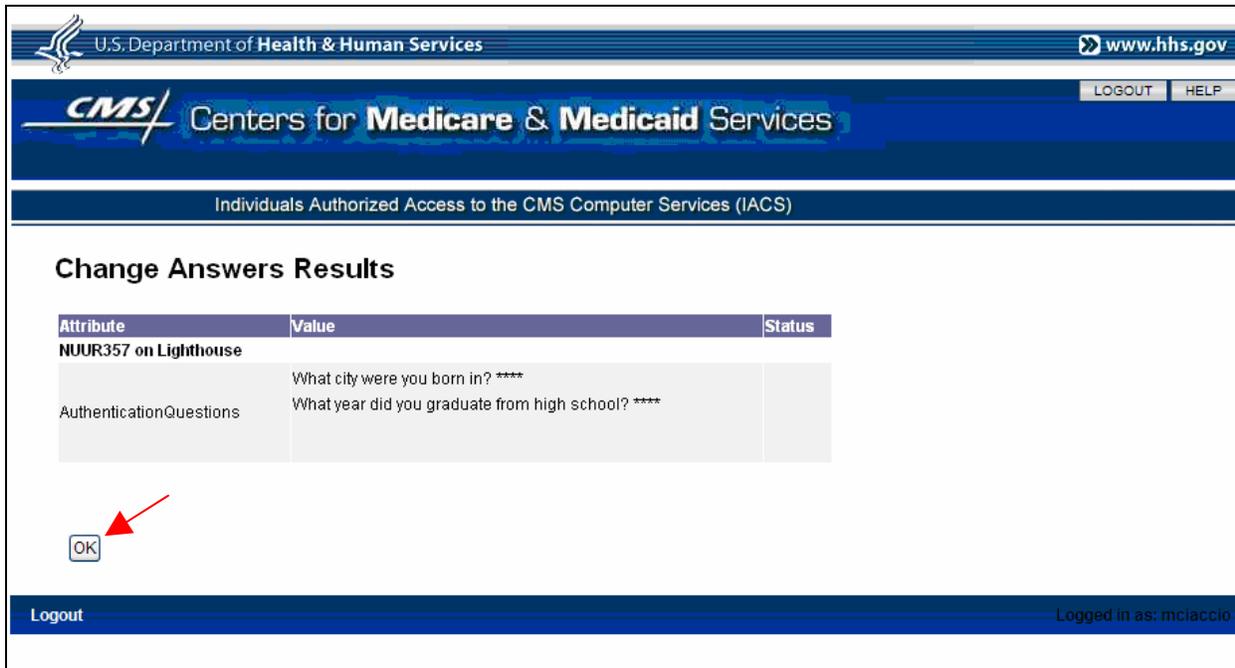


Figure 20: Change Answers Results Screen

**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 21)

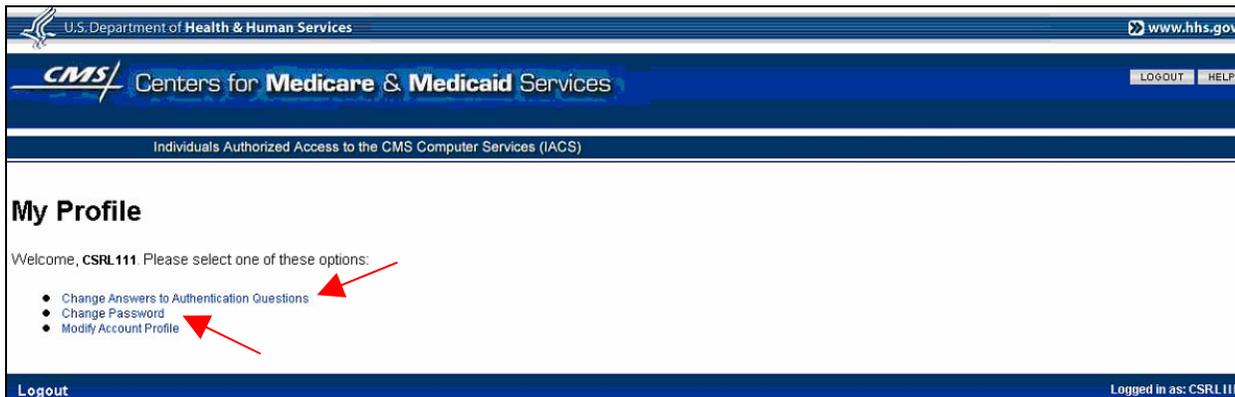


Figure 21: My Profile Screen

## 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 22.

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

Action: If you know you have forgotten your Password, enter your User ID

Action: 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 for your user community (See **Section 5.3 Help Desk Information**) to get an Admin to reset your password. When an 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.

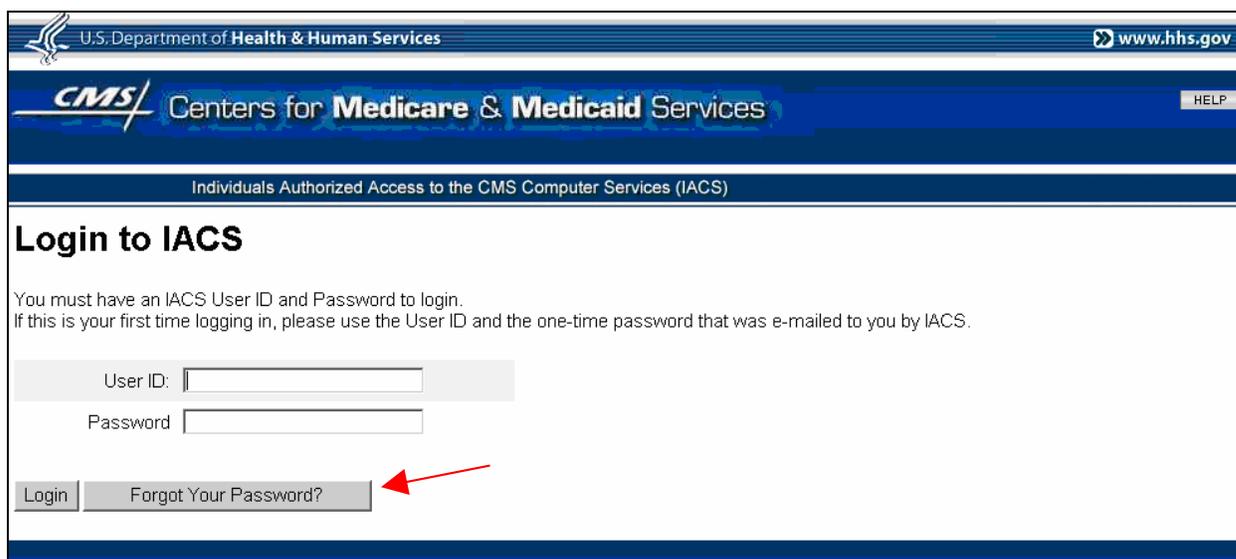


Figure 22: Log In to IACS Screen

An “Identify User” screen will be displayed, similar to the example shown in Figure 23. 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. (See **Section 5.3 Help Desk Information**)

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

**Action:** Click on **Login**.

The screenshot shows the 'Identify User' screen. At the top, there is a header for the U.S. Department of Health & Human Services with the URL www.hhs.gov. Below this is the CMS logo and the text 'Centers for Medicare & Medicaid Services'. A sub-header reads 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'Identify User', followed by the instruction: 'Please answer the following questions. Answers will be automatically converted to upper-case.' There are three input fields: 'Account ID' with the value '123ABCD', 'What city were you born in', and 'What year did you graduate from high school'. Red arrows point to the 'Login' button and the two question input fields. At the bottom, there is a 'Logout' link on the left and 'Logged in as: mciaccio' on the right.

**Figure 23: Password Identify User Screen**

The "Login 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 24)

The screenshot shows the 'Login to IACS' screen. At the top, there is a header for the U.S. Department of Health & Human Services with the URL www.hhs.gov. Below this is the CMS logo and the text 'Centers for Medicare & Medicaid Services'. A sub-header reads 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'Login to IACS', followed by the message: 'Email notification has been sent to you.' with a red arrow pointing to it. There are two input fields: 'GUID:' and 'Password'. At the bottom, there is a 'Login' button and a 'Forgot Your Password?' link.

**Figure 24: 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. Figure 25 shows an example of the password notification email you will receive.

Your temporary one-time password is Q377suA4.  
Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>  
Read the Privacy Statement and click "Enter".

Select the “**Account Management**” link on the blue menu bar, and then the “**My Profile**” link

Log into IACS using your User ID and password to change your password.

Thank you,  
IACS

Please do not reply to this system-generated email.

**Figure 25: Example of a Password Notification Email**

**Action:** Go to **Section 2.5 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 Computer Based Training (CBT) for Account Management**

IACS provides optional Computer Based Training (CBT) instructing new users on how to access and complete the New User Registration form. There is also CBT training on the additional IACS procedures. This is online training on the material contained in this User Guide. There is also CBT for disabled personnel.

Each training module consists of a simulated walk-through of a relevant IACS task supplemented by an interactive online User Guide. The CBT simulations “walk” the learner thru the “most common” task/process he/she will encounter.

There are no user tests associated with any of the modules.

To access the IACS CBT, go to the “Account Management” Screen which is shown in Figure 26.

**Action:** Select **Computer Based Training (CBT) For Account Management**

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for **Medicare & Medicaid** Services

Portal Home | CMS | FAQs | Feedback | Help | Email | Print

Introduction | Account Management | Plans | Providers

**Account Management**

CMS has established a single system to provide user registration and user account self-service capabilities. The links below will launch the registration application for new users to request access to the applications offered within the CMS Applications Portal and the self-service application for registered users.

- » [New User Registration](#) - Apply for a CMS computer services account
- » [My Profile](#) - Manage your CMS computer services account
- » [Computer Based Training \(CBT\) For Account Management](#)

**Help Resources**

-Medicare Health Care Providers should direct questions or concerns to the MCARE Help Desk at 1-866-440-3805 (phone), 1-615-238-0822 (fax) or via email [MCARE@cms.hhs.gov](mailto:MCARE@cms.hhs.gov)

-Health Plans should direct questions or concerns to MMAHelp desk at 1-800-927-8069 or via email at [mmahelp@cms.hhs.gov](mailto:mmahelp@cms.hhs.gov)

Department of Health & Human Services | [Medicare.gov](http://Medicare.gov) | [Firstgov.gov](http://Firstgov.gov)  
[Email Updates](#) | [Privacy Policy](#) | [Freedom of Information Act](#)  
 Centers for Medicare & Medicaid Services, 7500 Security Boulevard Baltimore, MD 21244

**Figure 26: Account Management Screen for CBT Access**

A CBT menu screen will open as shown in Figure 27.

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for **Medicare & Medicaid** Services

Individuals Authorized Access to the CMS Computer Services (IACS)

**Computer Based Training (CBT) For Account Management**

The following training is for *Individuals Authorized Access to the CMS Computer Services (IACS)* functions:

- [New User Registration](#)
- [Registered User: First-Time Login](#)
- [Forgot Your Password?](#)
- [Change Password](#)
- [Change Answers to Authentication Questions](#)
- [Pending Approvals](#)
- [Modify Account Profile](#)
- [EDI Enrollment](#)
- [Modify EDI Information](#)
- » [Accessible CBT](#)

The following plug ins may be required for optimal viewing:

- 1) Shockwave Player
- 2) Flash Player
- 3) Flash Player with ActiveX

These plug ins are available on the [Adobe Downloads Page](#).

If, when you open a CBT unit, a dialog box displays asking you to allow ActiveX controls and plug ins to run, select "Yes" to view the CBT properly.

To exit close this browser window.

**Figure 27: CBT Menu Screen**

As can be seen in Figure 27, the following training modules are available in the Account Management CBT for IACS:

- New User Registration
- Registered User: First-Time Login
- Forgot Password?
- Change Password
- Change Answers to Authentication Questions
- Modify Account Profile
- Pending Approvals

**Action:** Select the desired module to begin CBT training.

The “Accessible CBT” option takes the user to a screen with a similar list of training modules however these particular modules are especially designed for disabled individuals.

Future CBT and online documentation will be developed as needed and posted to allow users access prior to the roll out of a new release.

## 4.0 Questions and Troubleshooting

### 4.1 Help

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

**Action:** Go to: <https://www.cms.hhs.gov/home/tools.asp>

**Action:** Under **Sitewide Tools and Resources**, click on **Frequently Asked Questions**

**Action:** 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 5.3 Help Desk Information**)

### 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.

### 4.3 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 5.3, Help Desk Information)

## 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 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 5.3 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.

## 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 Help Desk Information

There are two Help Desks IACS applicants and users can go to for help with login or other issues.

The Help Desk associated with Medicare Advantage/Prescription Drug Plans is the MMA Help Desk. The phone number is 1-800-927-8069. They can be contacted at [mmahelp@cms.hhs.gov](mailto:mmahelp@cms.hhs.gov).

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](mailto:MCARE@cms.hhs.gov).

## 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
CA	Carrier
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
EDC	Enterprise Data Center
EDI	Electronic Data Interchange
EPOC	External Point of Contact
EUA	End User Administration
FAQ	Frequently Asked Questions
FI	Fiscal Intermediary
HPMS	Health Plan Management System
IACS	Individuals Authorized Access to CMS Computer Systems
ID	Identification
MA	Medicare Advantage
MAC	Medicare Appeals Council
MA-PD	Medicare Advantage – Prescription Drug
MARx	Medicare Advantage Prescription Drug
MBD	Medicare Beneficiary Database
MEIC	Medicare Eligibility Integration Contractor
MMA	Medicare Modernization Act
NPI	National Provider Identity
PDE	Prescription Drug Event
PDP	Prescription Drug Plan
RACF	Resource Access Control Facility
RAPS	Risk Adjustment Processing System
RHHI	Regional Home Health Intermediary
SSN	Social Security Number
UID	User Identifier
VDSA	Voluntary Data Sharing Agreement
270/271	270 (inbound eligibility request); 271 (outbound eligibility response)

## **Attachment A. MA/MA-PD/PDP/CC – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts**

## **Attachment B. CBO/CSR – Community Based Organization/Customer Service Representative**

## Attachment C. COB – Coordination of Benefits

## Attachment D. Provider (270/271)