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# Individuals Authorized Access to the CMS Computer Services (IACS) User Guide for the Help Desk

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11/08/2010	2.0	Revisions for IACS November 2010 Release(2010.03)	QSSI
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## 1.0 Introduction

Individuals Authorized Access to the CMS Computer Services (IACS) is an identity management system that provides the means for users needing access to CMS applications to:

- Identify themselves
- Apply for and receive login credentials in the form of a User Identifier (User ID) and Password
- Apply for and receive approval to access the required system(s).

This **IACS User Guide for the Help Desk** establishes the procedures for Helpdesk Users for the following CMS Applications integrated with IACS:

- **Coordination of Benefits (COB)**
- **Center for Strategic Planning – Health System Tracking Project (CSP - HSTP)**
- **Center for Strategic Planning – Medicaid and Children’s Health Insurance Program (CHIP) State Information Sharing System (CSP - MCSIS)**
- **Customer Service Representatives (1-800-Medicare CSR)**
- **Demonstrations Community**
- **Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Bidding System (DBidS)**
- **Electronic Correspondence Referral System (ECRS) Web**
- **GENTRAN**
- **HIPAA Eligibility Transaction System User Interface (HETS UI)**
- **HIPAA Eligibility Transaction System Provider Graphical User Interface (HPG)**
- **Internet Server (ISV)**
- **Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts (MA/MA-PD/PDP/CC)**
- **Medicaid Drug Rebate (MDR) State Exchange**
- **Medicare Exclusion Database (MED)**
- **Physician Quality Reporting System and E-Prescribing Incentive Programs (PQRS/eRx)**

- **Provider Statistical and Reimbursement / System for Tracking Audit and Reimbursement (PS&R/STAR)**

## 2.0 Referenced Documents

This **IACS User Guide for the Help Desk** and additional **IACS User Guides** include information regarding new and/or modified IACS screens and functionalities.

The following IACS help documentation has been added to the CMS IACS website ([http://www.cms.gov/MAPDHelpDesk/07\\_IACS.asp#TopOfPage](http://www.cms.gov/MAPDHelpDesk/07_IACS.asp#TopOfPage)) to provide additional information and instructions for IACS users:

- **IACS User Guide for CMS Applications** – provides registration and account maintenance information for CMS Applications users.
- **IACS User Guide for Approvers** – provides account maintenance information for IACS Approvers.
- **IACS User Guide for the Help Desk** – provides account maintenance information for the Helpdesk staff supporting CMS applications integrated with IACS.

## 3.0 Overview

The sensitivity of CMS data and the improved ability to access data combines to create a substantial risk to CMS and Beneficiaries. Legislations, like the Health Insurance Portability and Accountability Act (HIPAA), Federal Standards published by the National Institute of Standards and Technology (NIST), and CMS policies have been established to control that risk. IACS is the application that CMS uses to:

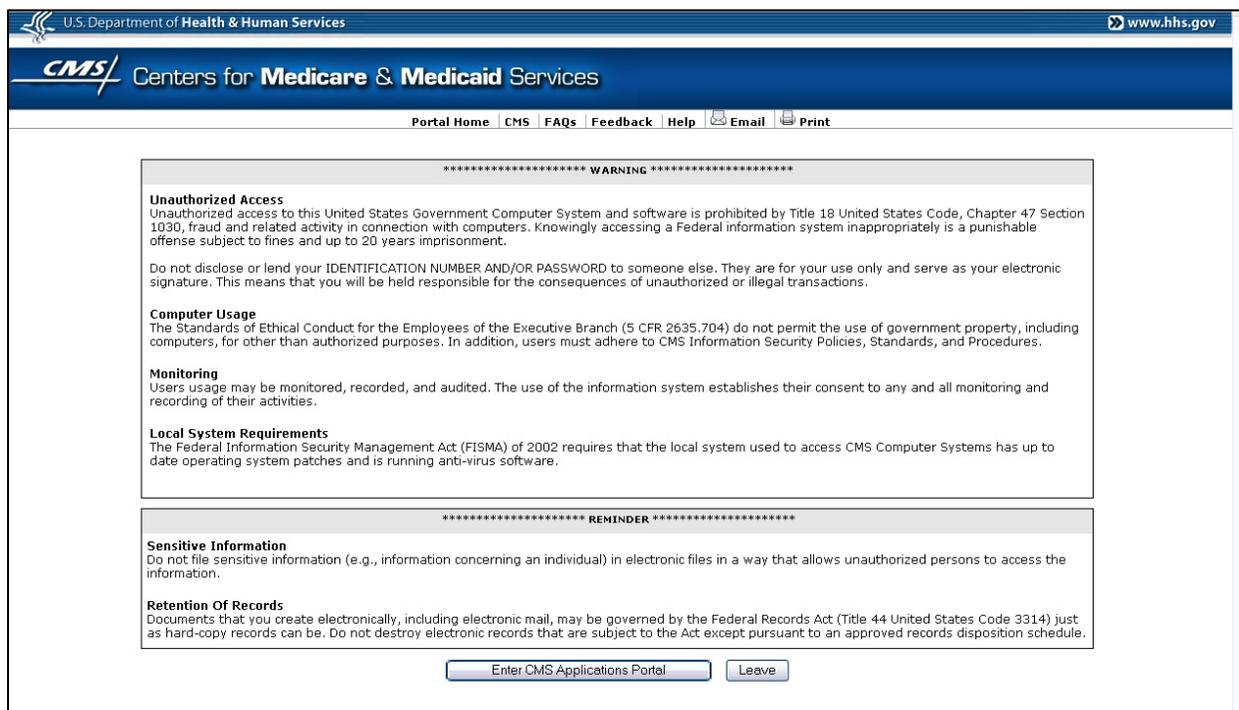
- Implement the security requirements of Federal legislation, Federal standards and CMS policies
- Provide secure, high quality services to protect CMS systems and data
- Register users; control the distribution of User IDs and passwords used to access CMS web-based applications

The **IACS User Guide for the Help Desk** provides procedural information and representative screens that are common to supported Helpdesks and includes:

- Searching and Viewing a user's IACS account
- Unlocking and Disabling a user's IACS account
- Resetting a user's IACS password

### 3.1 Warnings and Reminder

Users of United States Government Computer Systems must be aware of warnings regarding unauthorized access to those systems, computer usage and monitoring, and local system requirements. This information is presented in the opening screen of the CMS Applications Portal, as illustrated in Figure 1.



**Figure 1: CMS Applications Portal WARNING/REMINDER Screen**

All applicants to CMS Applications should read the important information on this screen and indicate their agreement by selecting the **Enter CMS Applications Portal** button.

If the user does not want to proceed any further, the user should indicate this by selecting the **Leave** button.

### 3.2 Terms and Conditions

In addition to the government warnings, there are specific CMS Computer Systems Security Requirements Terms and Conditions that potential IACS users need to know. During their registration process, the CMS **Terms and Conditions** screen will display as illustrated in Figure 2.

This screen contains the Privacy Act Statement and the Rules of Behavior which present the terms and conditions for accessing CMS computer systems.

IACS applicants must accept the terms and conditions to access CMS systems and applications.

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**

If you want to print the text on this screen, select the **Print** icon to the right of the text **before** taking any other action on the screen

To skip printing and continue with your registration, read the text, select the **I Accept the above Terms and Conditions** box, and then the **I Accept** button at the bottom of this screen.

CMS Computer Systems Security Requirements

PRIVACY ACT STATEMENT Print

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' 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 conditions. If you decline, your registration will automatically be cancelled.

I Accept the above Terms and Conditions

**Figure 2: Terms and Conditions Screen**

All of the **Terms and Conditions** on the screen should be read including the Privacy Act Statement and the Rules of Behavior. The user can select the **Print** icon to the right of the text to print this information.

To accept, the user must select the **I Accept the above Terms and Conditions** box and indicate agreement by selecting the **I Accept** button.

If the user selects the **I Decline** button, a small window will appear with a message asking him to confirm his decision to decline. If he confirms this, his IACS session is cancelled and a screen indicating this is displayed.

### 3.3 Conventions

This User Guide will present typical help desk support functions and management procedures. When functions are similar, the more common functions will be illustrated with notes indicating differences, such as specific information users must provide for different Applications. When appropriate, these notes will be illustrated with screen shots.

Every effort has been made to keep the screen shots and formatting conventions used in this document up to date. There may be, however, minor differences between on-screen text and what is shown in the figures in this User Guide. These differences should not affect the user's ability to assist application users and perform desired activities.

### 3.3.1 Formatting Conventions

The following formatting conventions have been used in this User Guide.

1. Screen names are indicated in **plain bold**.

Example:

The **My Profile** screen will display as illustrated in Figure 6.

2. References to partial screens displayed or items to be acted upon are indicated in **bold italics**.

Examples:

Available applications are listed in the ***New User Registration Menu for CMS Applications*** area of the **CMS Applications Menu** screen

Or

Select the ***Next*** button to continue.

3. References to hyperlinks are indicated in blue, underlined text.

Example:

Select the [Modify Account Profile](#) hyperlink.

4. References to figures and sections will take the user to that figure or section when selected.

Examples:

Go to Section 1.0 – *The number is the link. The user will be brought to that Section when the number is selected.*

Or

As illustrated in Figure 1 – *The combination of Figure and Number is the link. The user will be brought to that Figure when he selects either.*

5. When an action is required on the part of the reader, it is indicated by a line beginning with the word **Action:**

Example:

**Action:** Select the **OK** button.

6. Explanatory notes will be indicated with the word **Note:**

Example:

**Note:** The name of the MEIC Helpdesk has been changed to the MCARE Helpdesk.

7. Input fields are indicated in *plain italics*.

Example:

Enter your last name in the *Last Name* field.

8. Required input fields are indicated by an asterisk to the right of the field. These fields must be completed.
9. Some fields have help icons to their left if the user needs help on completing an input field. This icon is displayed as a small blue letter *i* inside a white box.

Examples of specific screens are used in this User Guide to illustrate what users would see during common helpdesk and management procedures. The names and/or data on these screens are meant to be representative and not to reflect actual IACS Users and/or Accounts.

### 3.4 Cautions & Warnings

IACS provides on-screen cautions and warnings to help guide users through procedures that require specific data formatting or are designed to alert the user before finalizing an action.

Caution and Warning messages are presented in a variety of formats: as a text warning message at the top of the active screen, as information text on the screen where an issue has been identified, and as a caution message which will require the user's action.

Additional examples of caution and warning messages are listed below.

The screenshot shows the 'New User Registration' screen for the U.S. Department of Health & Human Services. At the top, there is a navigation bar with the CMS logo and 'Centers for Medicare & Medicaid Services'. Below this is a sub-header 'Individuals Authorized Access to the CMS Computer Services (IACS)'. A yellow error box at the top center contains the text: 'Error Please enter a valid Date of Birth in mm/dd/yyyy, m/d/yyyy, mm/dd/yyyy or m/d/yyyy format.' Below the error box, the 'New User Registration' section is active, with a progress bar showing steps: 'New User Registration', 'Email Verification', 'Contact Information', 'Authentication Questions', 'Review Request', and 'Acknowledgement'. The 'User Information' section contains several input fields: 'Title' (dropdown), 'First Name' (text, value: Morgan), 'Last Name' (text, value: Freeman), 'Suffix' (dropdown), 'Middle Initial' (text), 'Professional Credentials' (text, example: MD, RN, LPN, MBA, PhD, etc. (Limit 12 characters)), 'Social Security Number' (text, value: 890-00-7854), 'Date of Birth' (text, value: jan 1 1985), and 'E-mail' (text, value: mfreeman@gmail.com). A 'Confirm E-mail' field is also present. A note at the bottom right states '\* Indicates a required field'. At the bottom left, there are 'Next' and 'Cancel' buttons. The footer includes 'OMB 0938-0389' and 'Effective date: 5/06'.

Figure 3: Warning Message

The message shown in Figure 3 notifies the user that an incorrect format has been used for Date of Birth (DOB) and also provides the correct format that the user should follow.

The screenshot shows a form titled "Professional Contact Information" and "Access Request". Under "Professional Contact Information", there are fields for Office Telephone (351-140-0000), Ext (351), Company Name (Mercy), Company Telephone (351-140-0000), Ext (351), Country (United States), Address 1 (1818 Riggs Rd), Address 2, City (Adelphi), State/Territory (MD), and Zip Code (35810). A note indicates "Valid Telephone Number Format is XXX-XXX-XXXX". Under "Access Request", the "Select Action" dropdown is set to "Modify Demonstrations Profile". Below this, "Type of User" is "Demonstrations" and "Role" is "EHRD User". A red message at the bottom states: "There are no details to modify as part of the EHRD application."

Figure 4: Information Message

The message shown in Figure 4 notifies the user that the option selected cannot currently be used.

The screenshot shows the "New User Registration" form in the CMS system. The form includes sections for "User Information", "Professional Contact Information", and "Access Request". A modal dialog box titled "Message from webpage" is displayed in the center, containing a question mark icon and the text: "Selecting OK will cancel your request. Are you sure you want to proceed?". The dialog has "OK" and "Cancel" buttons. The background form shows fields for Title, First Name (Morgan), Last Name (Freeman), Middle Initial, Professional Credentials, Social Security Number (890-00-7858), E-mail (mfreeman@hmail.com), Office Telephone (410-123-1234), Ext, Company Name, Company Telephone, Ext, Address 1, Address 2, City, State/Territory, and Zip Code. The "Access Request" section shows "User Type" as "MA/MA-PD/PDP/ICC" and "Role" as a dropdown menu. A "Justification for Action" text area is at the bottom. A footer note states "\* Indicates a required field".

Figure 5: Caution Message

The message shown in Figure 5 cautions the user that the user's action will cancel the registration. The user selects the **OK** button to confirm the action or selects the **Cancel** button to continue with the registration process.

## 4.0 Using the System – Managing Profiles

The following sections provide instructions for the most common help desk functions using the ECRS Help Desk as an example. Help desk functions for the other helpdesk roles are not significantly different from those provided. Noteworthy differences for other roles will be identified in Section 4.4.

In this release IACS will continue to support help desk functions for all Helpdesks through the IACS Administration Page (Section 4.1). Also in this release IACS will provide the equivalent help desk functions for selected Helpdesks through the [Manage users under my authority](#) hyperlink (Section 4.2).

Table 1 shows all Helpdesk roles and the corresponding applications they support.

Application	Help Desk Role	Supporting Help Desk
COB	COB Helpdesk	N/A
CSP - MCSIS	MCSIS Help Desk User	MCSIS Help Desk
CSP – HSTP	HSTP Help Desk User	HSTP Help Desk
CSR	LSA	N/A
DMEPOS Bidding System (DBidS)	CBIC-Tier1	CBIC Help Desk
	CBIC-Tier2	
ECRS	ECRS HelpDesk	ECRS Help Desk
GENTRAN	Gentran Helpdesk	IACS Administration
HETS UI	MEIC Helpdesk	MCARE Help Desk
HPG	MEIC Helpdesk	MCARE Help Desk
Internet Server	Internet Server Help Desk	IACS Administration
MA/MA-PD/PDP/CC	IUI Helpdesk	MAPD Help Desk
	MAPD Helpdesk	
	MAPD Helpdesk Admin	
MDR	Helpdesk	MAPD Help Desk
MED	MED Help Desk User	EUS Help Desk
PQRS/eRx	PQRI Helpdesk	QNet Help Desk
PS&R/STAR	PS&R/STAR Helpdesk	EUS Help Desk

**Table 1: Applications and the Corresponding Helpdesk Roles**

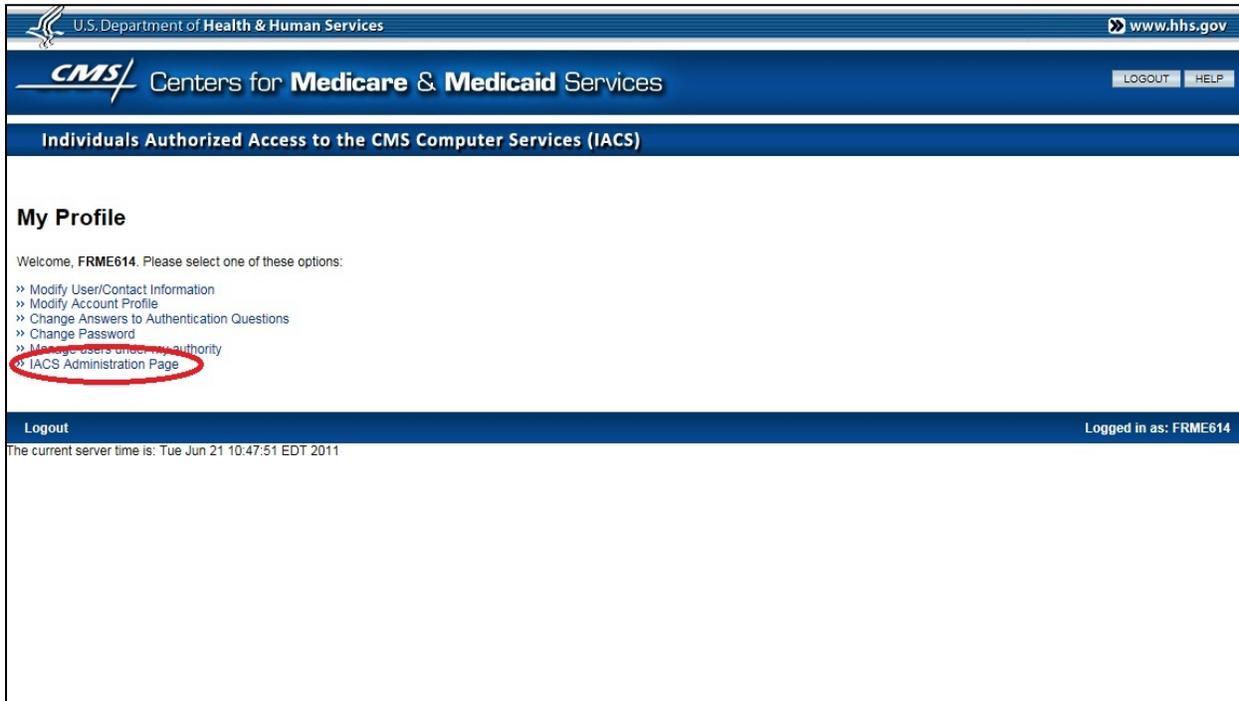
### 4.1 Help Desk Functions using the IACS Administration Page

All Helpdesks can perform the following standard help desk functions from the IACS Administration Page:

- Search for User Accounts
- List the User Accounts
- Disable User Account

- Reset User Password
- Unlock User Accounts
- View User Account Information
  - View Answers to Authentication Questions
  - View Date of Birth and Last 5 digits of the Social Security Number

To use the help desk functions, the Helpdesk user must first log into IACS using his IACS User ID and password. The **My Profile** screen will display after a successful login. Figure 6 illustrates the **My Profile** screen after a successful login by an ECRS Help Desk user.



**Figure 6: My Profile Screen**

**Action:** Select the [IACS Administration Page](#) hyperlink.

The **IACS Home** screen will display as illustrated in Figure 7.

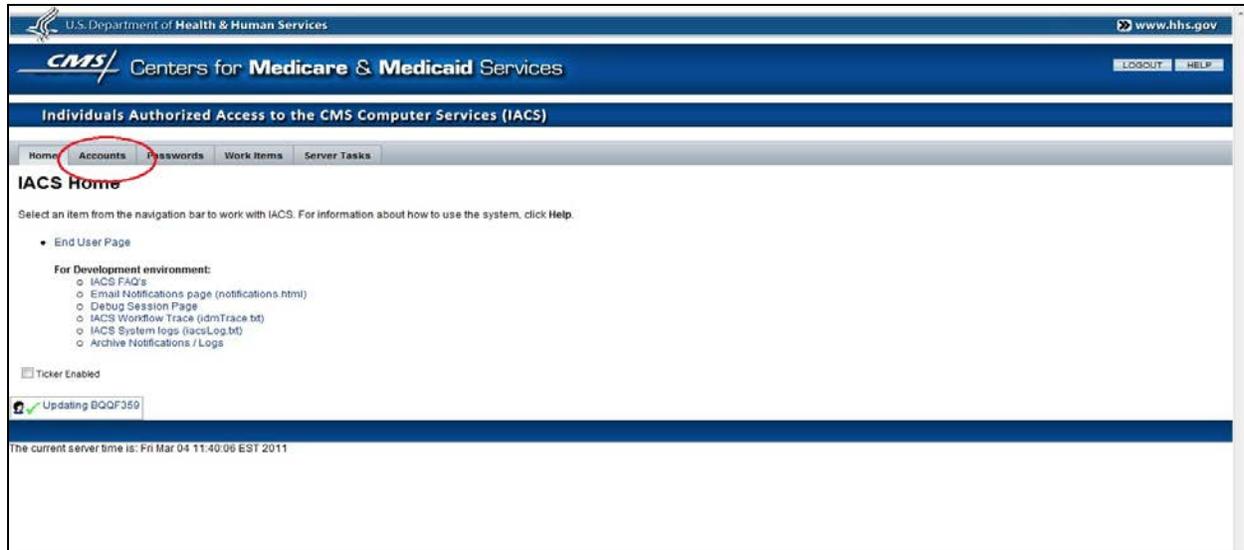


Figure 7: IACS Home Screen

#### 4.1.1 Searching for User Accounts

The Helpdesk user must log in to IACS and navigate to the **IACS Home** screen, as shown in Figure 7.

**Action:** Select the **Accounts** tab.

The **IACS Accounts** screen with tabs **List Accounts** and **Find Users** will display as illustrated in Figure 8.

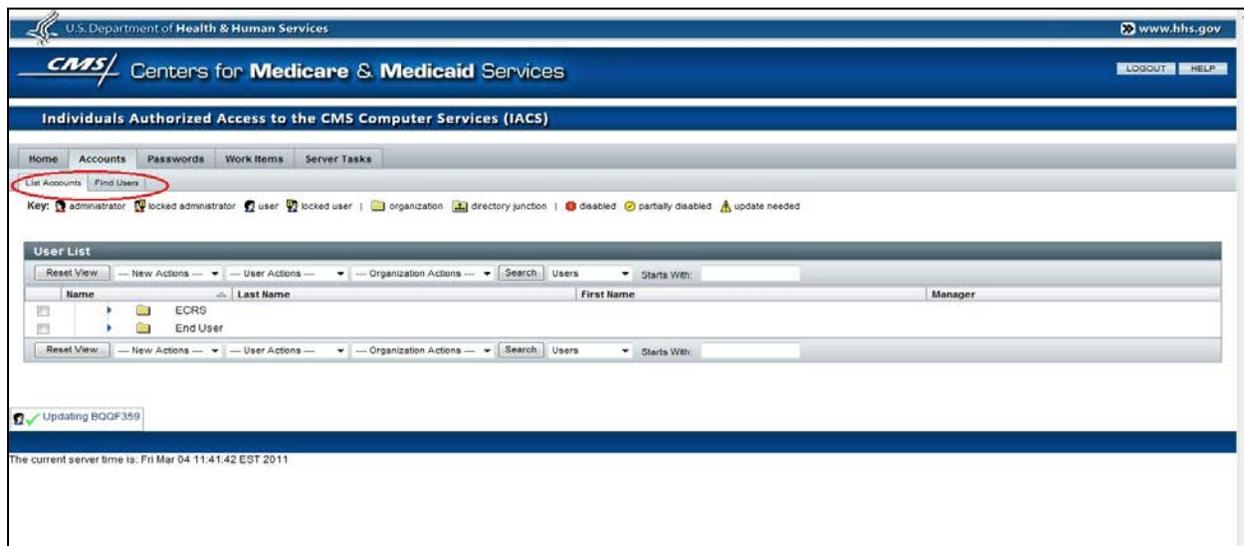


Figure 8: IACS Accounts Screen – Find Users

**Action:** Select the **Find Users** tab.

The **Find Users** screen will display as illustrated in Figure 9.

Figure 9: Find Users Screen

- Action:** Select the first check box to set the *Search Type*, *Match Criteria*, and *Attribute Value*.
- Action:** Select the desired criteria for the *Search Type* input field from the drop-down list. Available criteria are: *Name* (the IACS User ID), *First Name*, *Last Name*, or *E-mail Address*.
- Action:** Select the *Search Match Criteria* (starts with, contains, etc.) from the middle drop-down list.
- Action:** Enter the desired *Attribute Value* in the input field to the right of the *Search Match Criteria* input field. The information you will enter here will depend on the *Search Type* and *Search Match Criteria* you have selected.
- Action:** Select the **Search** button at the bottom of the screen.

In this case, “Name” was used as the *Search Type*, “starts with” as *Match Criteria*, and “DM” as the *Attribute Value*.

The screen will refresh and the **User Account Search Results** screen will display as illustrated in Figure 10.

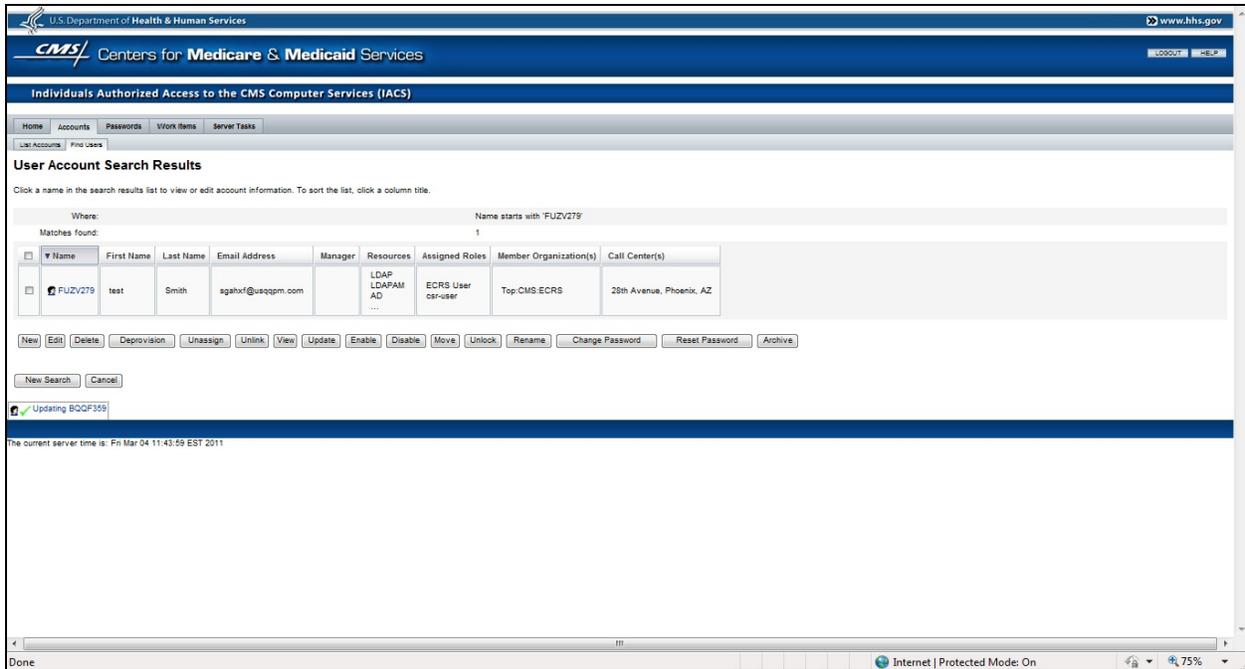


Figure 10: User Account Search Results Screen

### 4.1.2 Listing the User Accounts

Helpdesks can use the **List Accounts** tab to list and search users within their scope of responsibility, as illustrated in Figure 11.

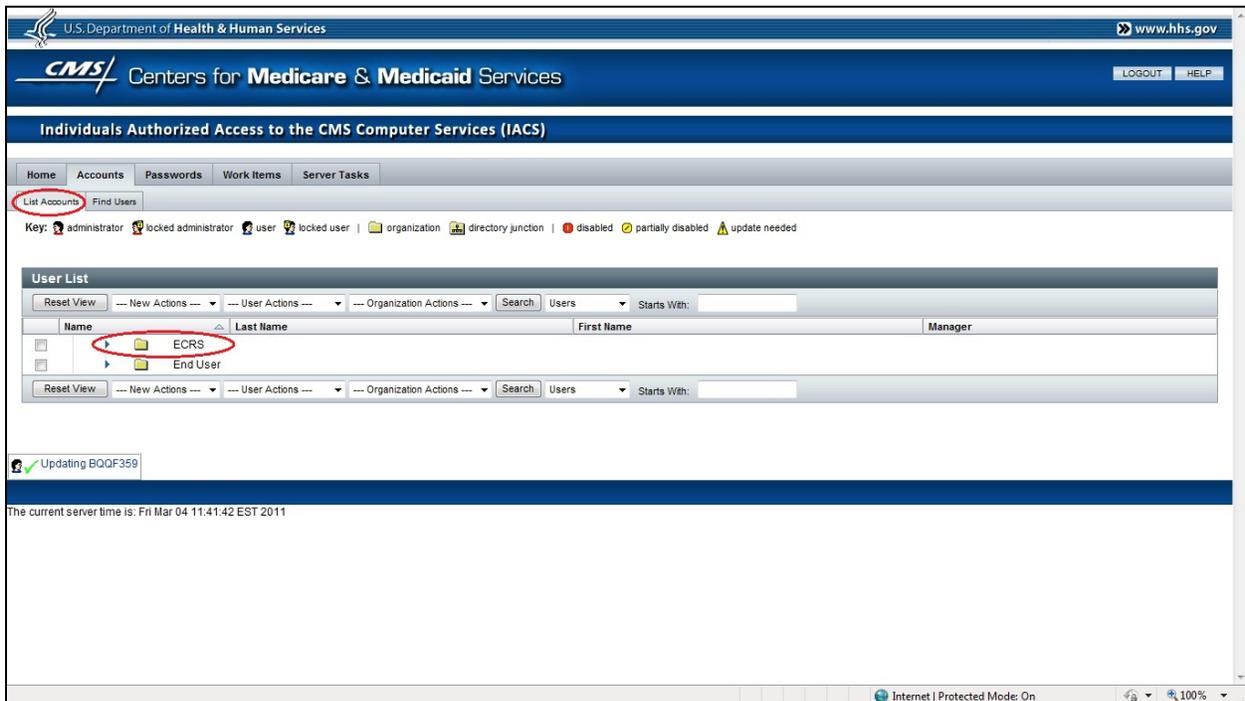


Figure 11: IACS Accounts – List Accounts Screen

**Action:** Select the *List Accounts* tab.

**Action:** Select the *Application* folder.

The **User List** will display as illustrated in Figure 12.

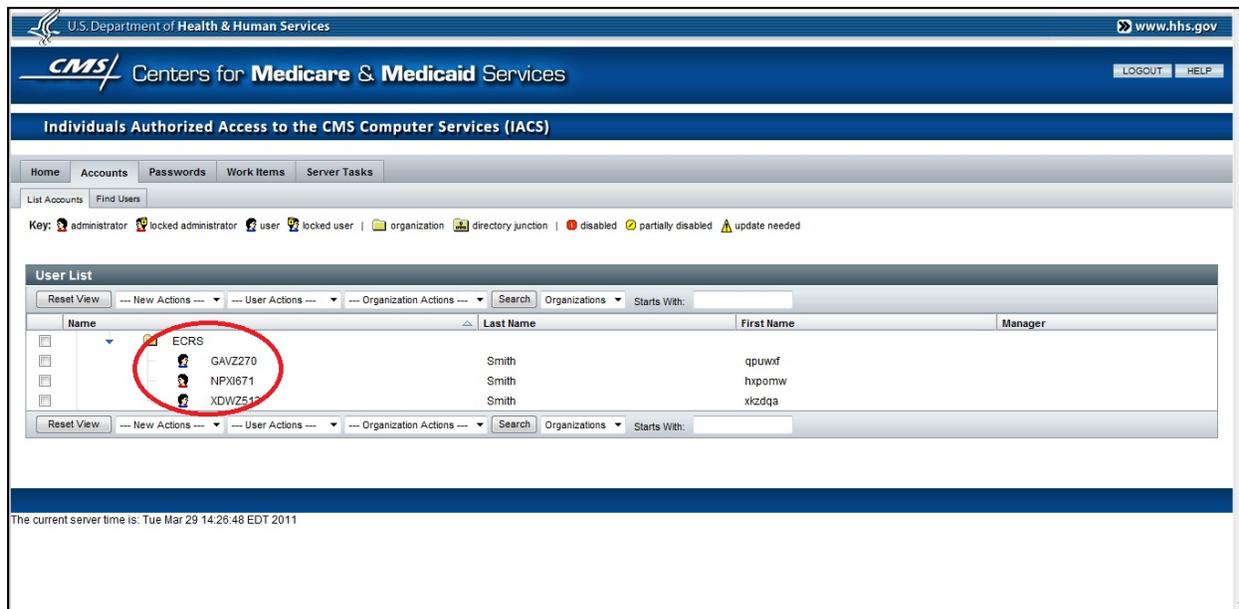


Figure 12: User List Screen

### 4.1.3 Disable User Account

Helpdesks can disable the user accounts within their scope of responsibility using the Disable User Account functionality from the *User Actions* drop-down list.

**Action:** From the **IACS Accounts** screen, select the *List Accounts* tab, as illustrated in Figure 11.

**Action:** Select the *Disable* option from *User Actions* drop-down list as illustrated in Figure 13.

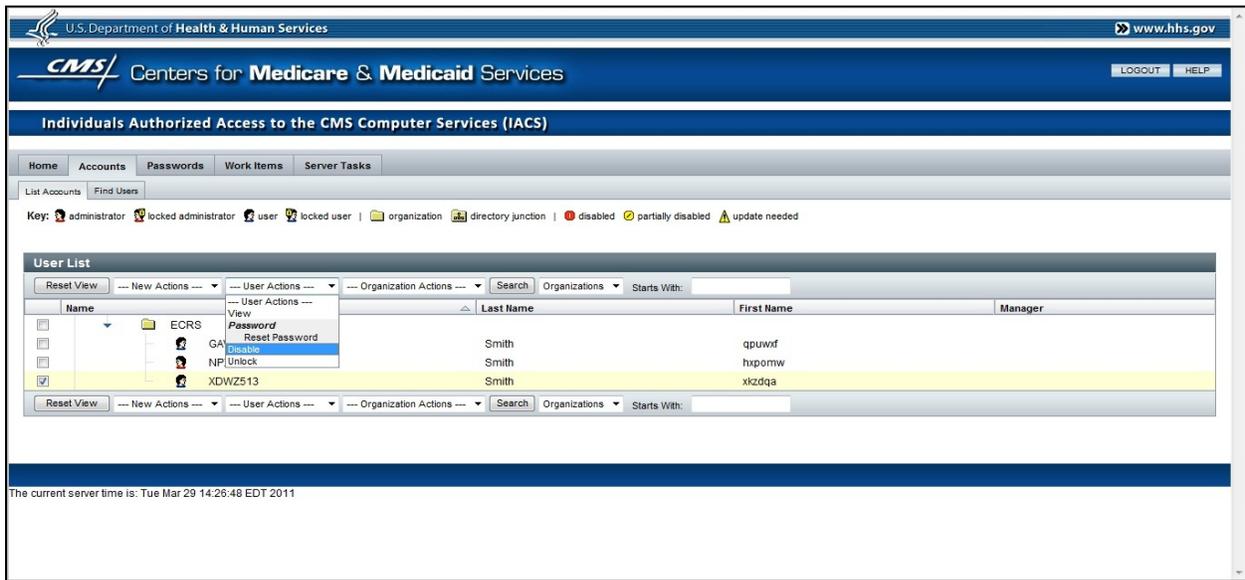


Figure 13: List Accounts – Disable

The **Disable** <User ID will appear here> **Resource Accounts** screen will display as illustrated in Figure 14.

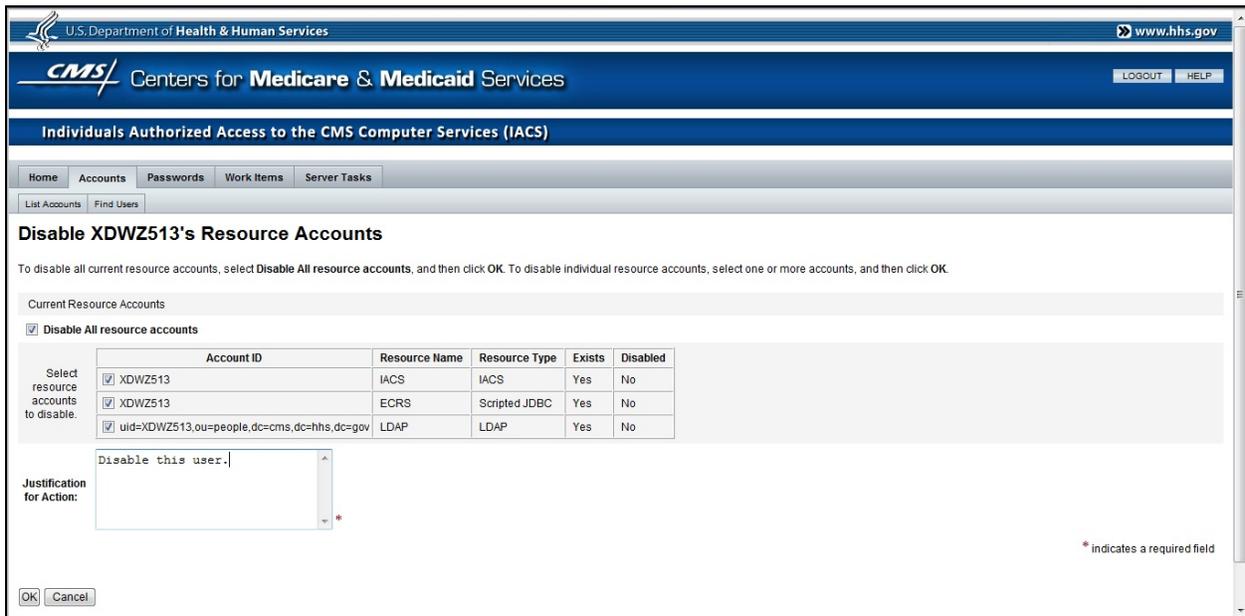


Figure 14: Disable User Resource Accounts

**Action:** Select the check box to the left of the *Disable All resource accounts* label at the top of the **Disable** <User ID will appear here> **Resource Accounts** screen.

**Action:** Select the **OK** button at the bottom of the screen.

The disable process will initiate and the **Disable Resource Account Results** screen will display, demonstrating the process flow involved in disabling the user account.

**Action:** Check to make sure that all of the **Workflow Status, Process Diagram** boxes are green, indicating that the Disable User Account action was successful.

**Action:** Select the **OK** button at the bottom of the screen to return to the **IACS Account** screen.

**Note:** The user will be disabled when the process completes and the status will be reflected. The **IACS Account – List Accounts** screen will display a red icon to the left of the **IACS User ID**, as illustrated in Figure 15.

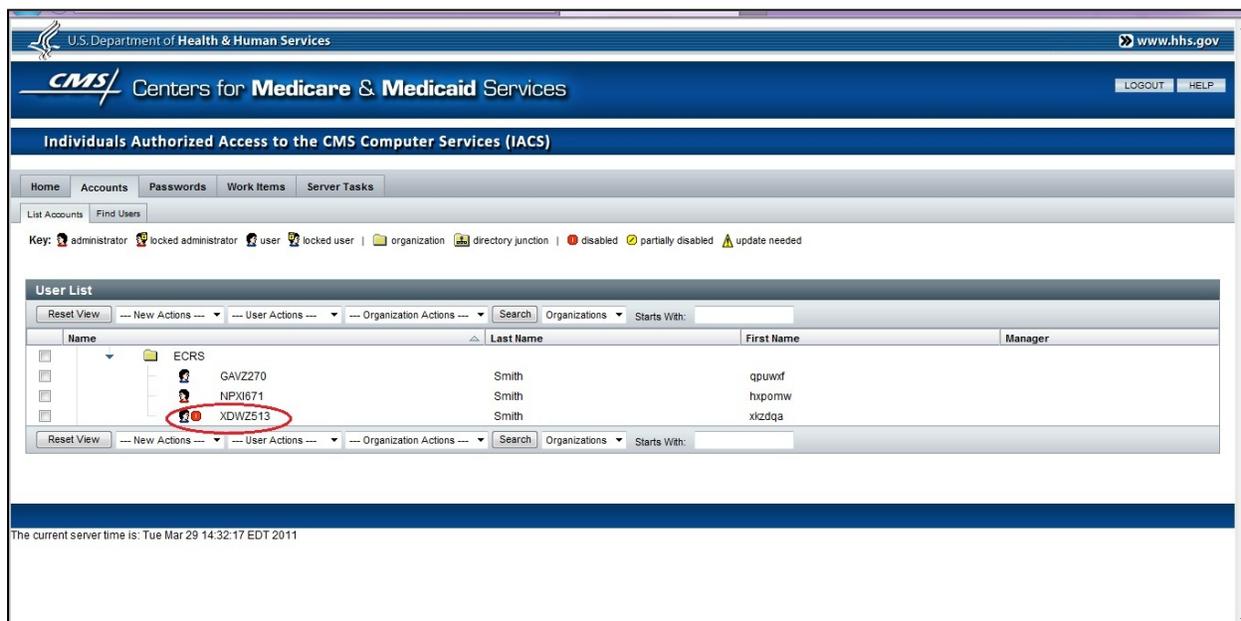


Figure 15: List Accounts – User Disabled

#### 4.1.4 Reset User Password

For users under their scope of responsibility, Helpdesks can reset the users' IACS password. Once the password is reset, the user will receive an E-mail notification with a one-time temporary password. IACS requires the user to change the temporary password at the time of login.

**Action:** From the **IACS Accounts** screen, select the **List Accounts** tab as shown in Figure 11.

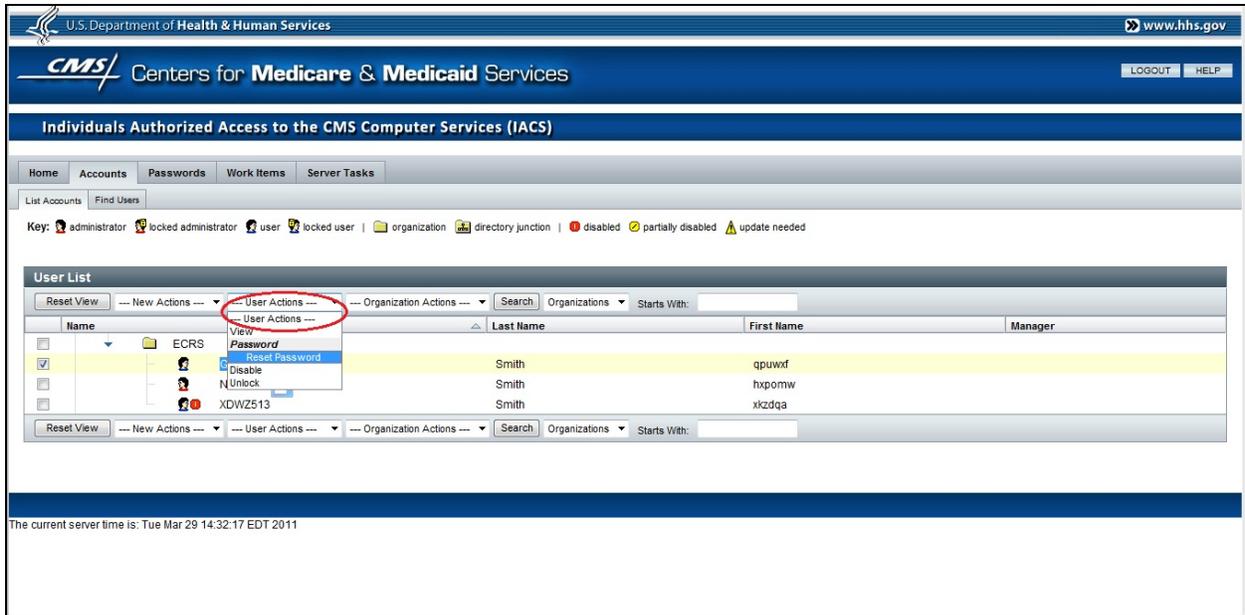


Figure 16: List Accounts – Reset Password

**Action:** Select the *Reset Password* option from the *User Actions* drop-down list as illustrated in Figure 16.

The **Reset User Password** screen will display as illustrated in Figure 17.

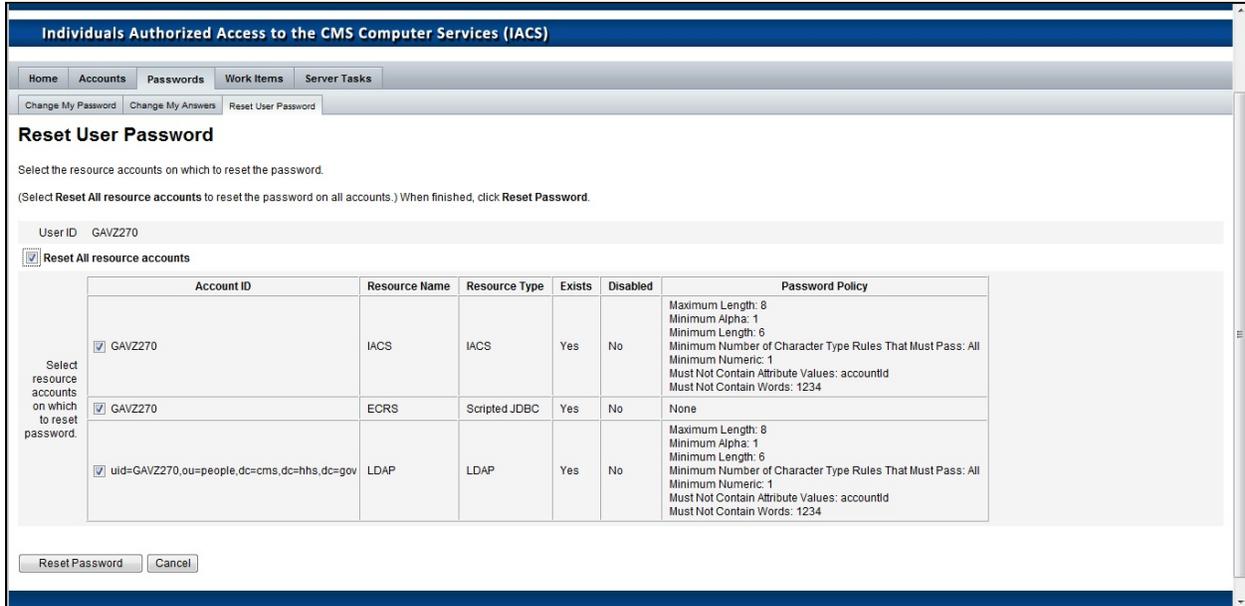


Figure 17: Reset User Password Screen

**Action:** Select the check box to the left of the *Reset All resource accounts* label at the top of the **Reset User Password** screen.

**Action:** Select the **Reset Password** button at the bottom of the screen.

The password reset process will initiate and the **Reset User Password Results** screen will display, demonstrating the process flow involved in the reset password.

**Action:** Check to make sure that all of the **Workflow Status, Process Diagram** boxes are green, indicating that the Reset Password action was successful.

**Action:** Select the **OK** button at the bottom of the screen to return to the **IACS Account** screen.

**Note:** An E-mail will be sent to the user with a one-time temporary password.

The screen will refresh and the user will be returned to the **IACS Account – List Accounts** screen, as illustrated in Figure 11.

#### 4.1.5 Unlock User Accounts

In order to unlock a user account, the Helpdesk needs to first verify that the user's account is 'Locked'. The **IACS Account – List Accounts** screen will display a yellow lock to the left of the IACS *User ID* shown in the *Name* column. Figure 18 demonstrates the *User Actions* drop-down screen with an ECRS Help Desk User logged in.

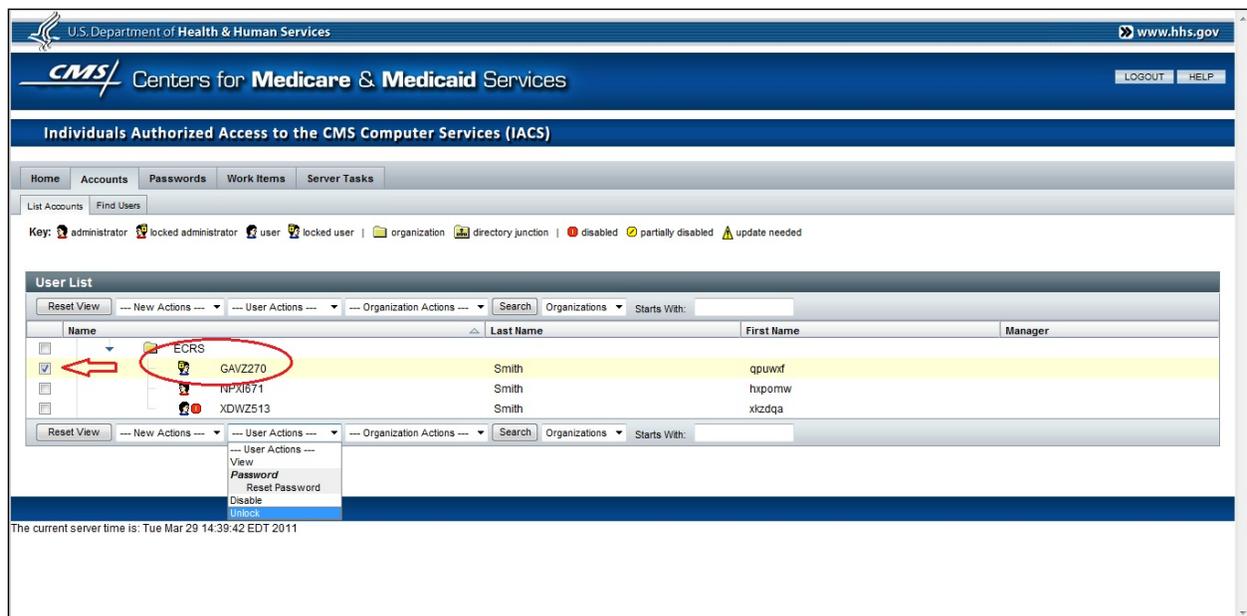
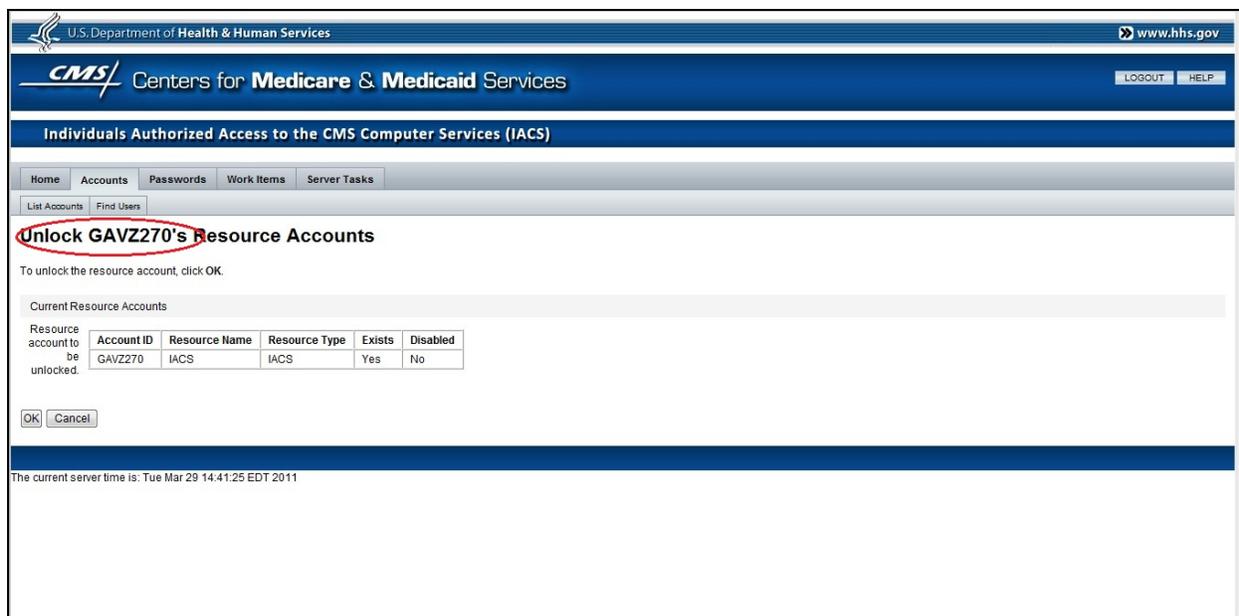


Figure 18: List Accounts – Unlock User Account

**Action:** Select the check box to the left of the user account(s) you want to unlock.

**Action:** Select the **Unlock** button.

An **Unlock**<User ID will appear here> **Resource Accounts** confirmation screen will display listing the account name and resources to be unlocked, as illustrated in Figure 19.



**Figure 19: Unlock User Account – Unlock Confirmation Screen**

**Action:** Select the **OK** button to confirm the IACS account that is required to be unlocked.

The unlock process will initiate and the **Unlock Resource Account Results** screen will display, demonstrating the process flow involved in unlocking the user account.

**Action:** Check to make sure that all of the **Workflow Status, Process Diagram** boxes are green, indicating that the Unlock User Account action was successful.

**Action:** Select the **OK** button at the bottom of the screen to return to the **IACS Account** screen.

The screen will refresh and the user will be returned to the **IACS Account – List Accounts** screen, as illustrated in Figure 11. The user account will no longer display as 'Locked'.

#### 4.1.6 View User Account Information

As part of the **View** capability, Helpdesks can view the account information of the users under their scope of responsibility for the purpose of identifying the users for any account maintenance activity. At any point, Helpdesks can only view the user account information including:

- User Authentication Questions and Answers
- User's last 5 digits of SSN and Date of Birth

**Action:** From the **List Accounts** tab, select the check box to the left of the user account(s) you want to view.

**Action:** Select the **View** option as illustrated in Figure 20.

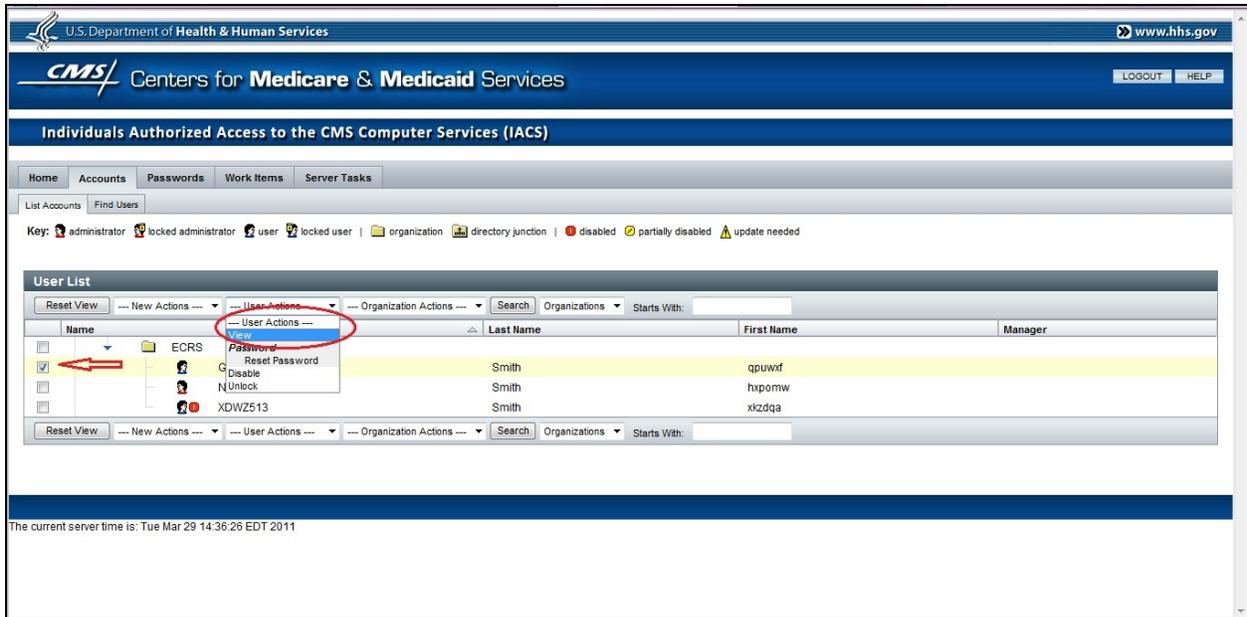


Figure 20: List Accounts – View User Account

The **View User** screen will display.

**Action:** Select the **Security** tab.

The user’s authentication questions and answers will display as illustrated in Figure 21.

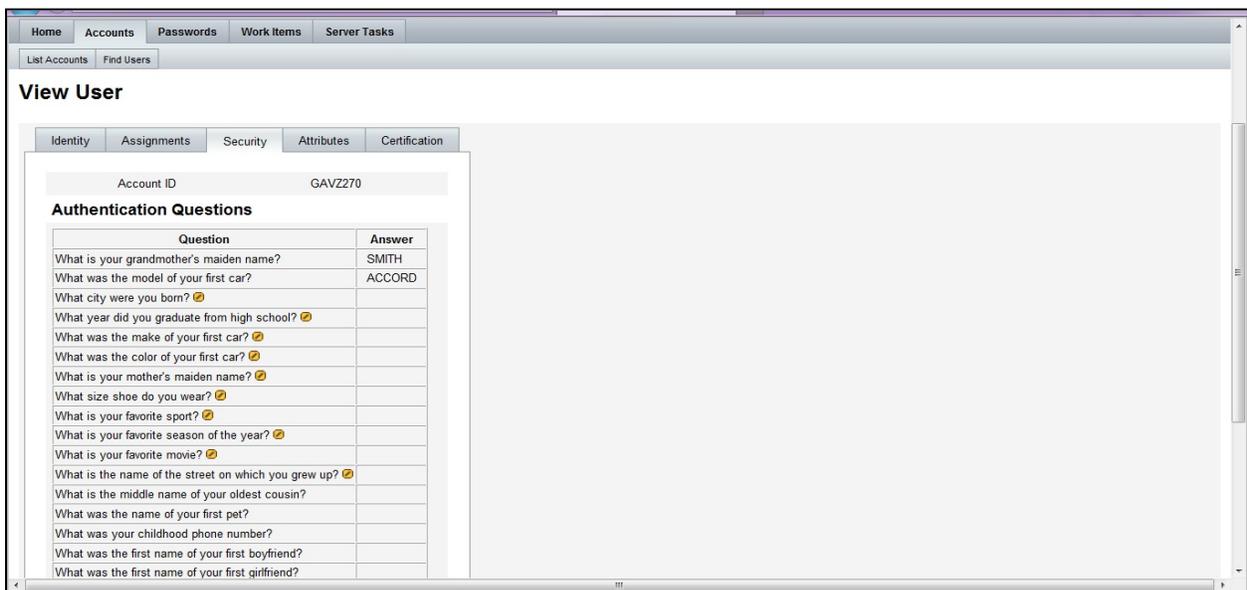
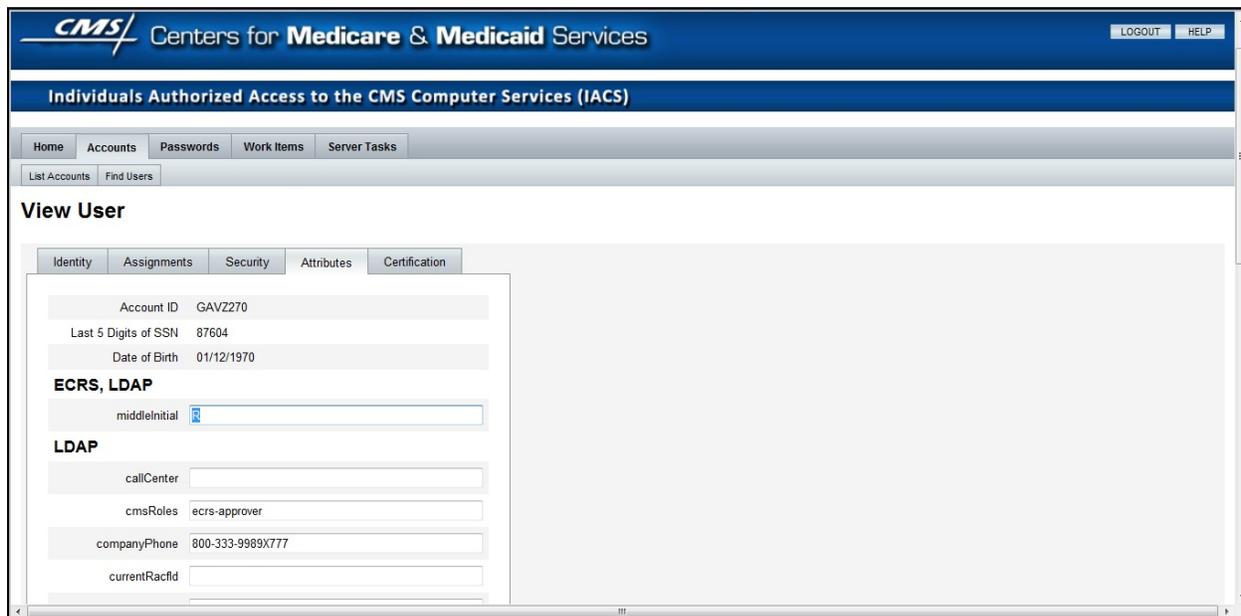


Figure 21: View User – User's Authentication Questions and Answers

Helpdesks can view the user’s *Last 5 digits of SSN* and the *Date of Birth* by selecting the **Attributes** tab.

**Action:** Select the **Attributes** tab on the **View User** screen.

The user's last 5 digits of SSN and the date of birth will display in **Attributes** tab, as illustrated in Figure 22.



**Figure 22: View User – User's SSN and Date of Birth**

**Action:** Select the **Cancel** button at the bottom of the screen from any of the tabs to return to your search results.

The screen will refresh and the user will be returned to the **IACS Account – List Accounts** screen, as illustrated in Figure 11.

**Action:** If you want to exit the IACS Administrative Interface, select the **Home** tab at the top of the screen.

The **IACS Home** screen will display as illustrated in Figure 7.

**Action:** Select the [End User Page](#) hyperlink to return to your **My Profile** screen.

The **My Profile** screen will display as illustrated in Figure 6.

#### 4.2 Help Desk Functions using the Manage users under my authority

In this release, selected Helpdesks can perform the following standard help desk functions from the **Manage users under my authority** screen:

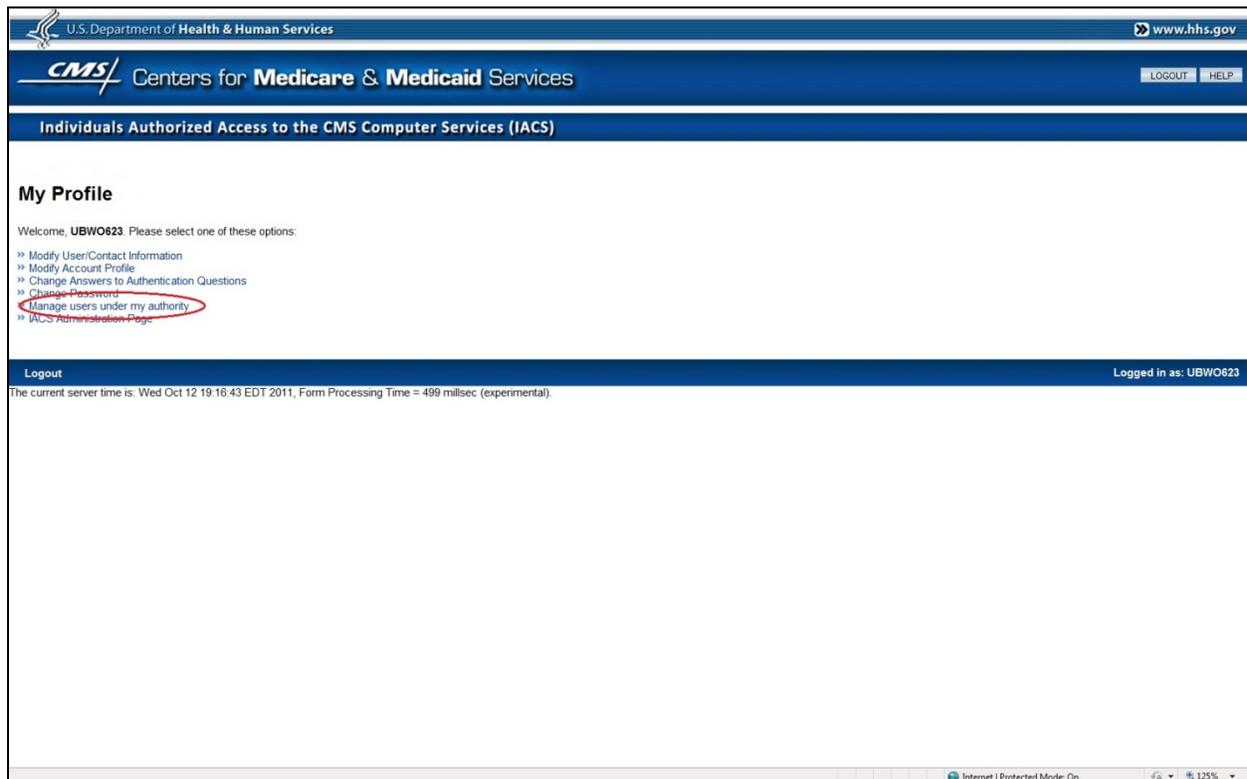
- Search and List User Accounts
- View User Accounts
- Disable User Account
- Reset User Password

- Unlock User Account

Application	Help Desk Role	Supporting Help Desk
CSP - MCSIS	MCSIS Help Desk User	MCSIS Help Desk
CSP – HSTP	HSTP Help Desk User	HSTP Help Desk
ECRS	ECRS HelpDesk	ECRS Help Desk
GENTRAN	Gentran Helpdesk	IACS Administration
HETS UI	MEIC Helpdesk	MCARE Help Desk
HPG	MEIC Helpdesk	MCARE Help Desk
Internet Server	Internet Server Help Desk	IACS Administration
MDR	Helpdesk	MAPD Help Desk
MED	MED Help Desk User	EUS Help Desk
PQRS/eRx	PQRI Helpdesk	QNet Help Desk
PS&R/STAR	PS&R/STAR Helpdesk	EUS Help Desk

**Table 2: Applications and Helpdesk Roles using Manage Users Under My Authority for Help Desk Functions**

To use the Manage users under my authority function, the Helpdesk user must first log in to IACS using his IACS User ID and password. The **My Profile** screen will display after a successful login. Figure 23 illustrates the **My Profile** screen after a successful login by an ECRS Help Desk user.



**Figure 23: My Profile Screen**

**Action:** Select the [Manage users under my authority](#) hyperlink.

The **Manage users under my authority** screen with multiple **Search Criteria** options will display as illustrated in Figure 24.

The screenshot shows the 'Manage users under my authority' screen. The title 'Manage users under my authority' is circled in red. The screen displays the following search criteria:

- User ID(s):** [Text input field] Multiple User ID(s) should be comma separated
- First Name:** starts with [Dropdown menu]
- Last Name:** starts with [Dropdown menu]
- Application:** Electronic Correspondence Referral System (ECRS) Web
- Email:** starts with [Text input field]
- Search for Archived Users ONLY:** [Checkbox]
- User Status:** All [Dropdown menu]
- Role:** All roles [Dropdown menu]
- Results per page:** 20 [Dropdown menu]

Buttons for 'Search' and 'Cancel' are located at the bottom of the search criteria section. The footer includes 'Logout', 'Effective date: 5/...', and 'Logged in as: UBWO62'.

**Figure 24: Manage Users Under My Authority Screen**

#### 4.2.1 Searching for User Accounts

Helpdesks can view the users of their corresponding application(s) using the Manage users under my authority function, as illustrated in Figure 24.

**Action:** Select the desired **Search Criteria** by entering the appropriate data in the search fields or selecting from the available drop-down lists.

**Note:**

- Helpdesks can search users by *User ID(s), First Name, Last Name, E-mail, User Status, and Role*.
- Search by *User Status* and *E-mail* is only applicable for the Application Helpdesk roles mentioned in Table 2.
- If a Helpdesk supports multiple CMS Applications, then an application should be selected from the application drop-down list in order to continue with the search.

**Action:** Select the **Search** button when you have finished selecting your search criteria.

The screen will refresh and the **Search Results** will display in a table under the **Search Criteria** area, as illustrated in Figure 25.

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

**Manage users under my authority**

**Search Criteria**

User Id(s):  Multiple User Id(s) should be comma separated

First Name: starts with

Last Name: starts with

Application: Electronic Correspondence Referral System (ECRS) Web

Email: starts with

Search for Archived Users ONLY

User Status: All

Role: ECRS Approver

Results per page: 10

**Search Results (22 results)**

Page 2 of 3

Select	User Id	First Name	Last Name	Email	Role	User Status
<input type="radio"/>	OZTJ421	itspny	Smith	atydsp@ctioiv.com	ECRS Approver	Active
<input type="radio"/>	QZOX874	jdewit	Smith	SAUJ_ECRS_5A@YAHOO.COM	ECRS Approver	Partially Disabled
<input type="radio"/>	RGK474	rkqsg	Smith	Approver@test.org	ECRS Approver	Partially Disabled
<input type="radio"/>	TALA615	vzmt	Smith	dbdys@jngbw.com	ECRS Approver	Partially Disabled
<input type="radio"/>	TBGB939	yfsvo	Smith	sira(231@gmail.com	ECRS Approver	Active
<input type="radio"/>	THR0973	xpiptq	Smith	soaosy@njbtbq.com	ECRS Approver	Fully Disabled, Locked
<input type="radio"/>	UMLB294	Bob	Smith	bob@hotmail.com	ECRS Approver	Active
<input type="radio"/>	VBK131	leuawo	Smith	rdqsv@pvmhak.com	ECRS Approver	Active
<input type="radio"/>	WEIY437	wmkjll	Smith	viewrp@wzzast.com	ECRS Approver	Partially Disabled
<input type="radio"/>	XLZA300	MimilMAApprover	Smith	MimilMAApprover@test.org	ECRS Approver	Partially Disabled

OMB: 0938-0988 Effective date: 5/08  
 Logout Logged in as: UBW0623  
 The current server time is: Thu Oct 13 10:12:28 EDT-2011. Form Processing Time = 3147 msec. (experimental)

**Figure 25: Manage Users Under My Authority Screen – Search Results**

The **Search Results** will include a radio button to the left of each row of the user record and the following help desk function buttons will display at the bottom of the page, as illustrated in Figure 25:

- View
- Fully Disable
- Unlock
- Reset Password

**Note:**

- The help desk function buttons will be inactive until the Helpdesk selects a user record. Once the radio button is selected, the help desk function buttons are enabled based on the user's status.
- The standard help desk functions using the Manage users under my authority are only available to the Helpdesks listed in Table 2.
- The Helpdesks that are not listed in Table 2 will not see the radio buttons or the help desk function buttons in the **Manage users under my authority-Search Results** screen.

Helpdesks can view Archived Users of their corresponding application(s) using the Manage users under my authority function, as illustrated in Figure 26.

**Action:** Select the *Search for Archived Users ONLY* check box in the **Manage users under my authority** screen.

The screenshot shows the 'Manage users under my authority' interface. The 'Search Criteria' section includes fields for User ID(s), First Name, Last Name, Application (set to ECRS), Email, Archived Date, and Role (set to ECRS User). The 'Search for Archived Users ONLY' checkbox is checked and circled in red. Below the search criteria, the 'Search Results' section shows 2 results in a table. The table has columns for User ID, First Name, Last Name, Role, Email, Archival Status, Archival Date, and Archival Justification. The results are for users XLDV708 and YQCH070, both ECRS Users who have been archived. The 'Search' button is also circled in red.

User ID	First Name	Last Name	Role	Email	Archival Status	Archival Date	Archival Justification
XLDV708	ojwnnz	Smith	ECRS User	hiirny@wsrpy.com	Archived	06/14/2011 11:41:46	ecrs user archived one
YQCH070	xnqedu	Smith	ECRS User	gkyvea@eolbxf.com	Archived	06/14/2011 11:44:48	ecrs user two archive

**Figure 26: Manage Users Under My Authority Screen – Search Results (Archived Users)**

**Action:** Select the desired **Search Criteria** by entering the appropriate data in the search fields or selecting from the available drop-down lists.

**Note:** Helpdesks can search Archived users using *User ID(s)*, *First Name*, *Last Name*, *E-mail*, *Archived Date*, and *Role*.

**Action:** Select the **Search** button when you have finished selecting your search criteria.

The screen will refresh and the **Search Results** will display in a table under the **Search Criteria** area, as illustrated in Figure 26.

**Note:**

- If the **Search** button is selected with no search criteria, then the search results will include all users under the Helpdesk's scope of responsibility.
- The help desk function buttons are not shown when searching for Archived users.

#### 4.2.2 View User Account Information

As part of the View capability, the Helpdesk can view the account information of the users under their scope of responsibility for the purpose of identifying the users for any account maintenance activity.

**Action:** Select the radio button shown to the left of a user record, as illustrated in Figure 27.

The **Search Results** area of the **Manage users under my authority** screen will refresh and the appropriate help desk function buttons will be enabled depending on the user's status.

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

**Manage users under my authority**

**Search Criteria**

User Id(s):  Multiple User Id(s) should be comma separated

First Name: starts with

Last Name: starts with  smith

Application: Electronic Correspondence Referral System (ECRS) Web

Email: starts with

Search for Archived Users ONLY

User Status: All

Role: ECRS Approver

Results per page: 10

**Search Results (22 results)**

Page 2 of 3

Select	User Id	First Name	Last Name	Email	Role	User Status
<input type="radio"/>	OZTJ421	ispnny	Smith	atydpn@ctuov.com	ECRS Approver	Active
<input type="radio"/>	OZO0674	jdedwt	Smith	SANU_ECRS_5A@YAHOO.COM	ECRS Approver	Partially Disabled
<input type="radio"/>	RGK1474	Wjvug	Smith	Approver@test.org	ECRS Approver	Partially Disabled
<input type="radio"/>	TALA615	vzmt	Smith	dbdys@jngbw.com	ECRS Approver	Partially Disabled
<input type="radio"/>	TBGB939	xfsvo	Smith	sira231@gmail.com	ECRS Approver	Active
<input type="radio"/>	THR0973	xpiptq	Smith	soaosy@njbba.com	ECRS Approver	Fully Disabled, Locked
<input checked="" type="radio"/>	UMLB294	Bob	Smith	bob@hotmail.com	ECRS Approver	Active
<input type="radio"/>	VBK131	Ieuawo	Smith	rdqps@pvmhak.com	ECRS Approver	Active
<input type="radio"/>	WEY437	wmkyj	Smith	viewp@wzzast.com	ECRS Approver	Partially Disabled
<input type="radio"/>	XLZA300	MimiMAApprover	Smith	MimiMAApprover@test.org	ECRS Approver	Partially Disabled

Effective date: 5/05  
Logged in as: U8W0623

**Figure 27: Manage Users Under My Authority Screen – Help desk Function Buttons Enabled**

**Action:** Select the **View** button.

The **View Profile** screen will display which includes the navigation tabs as illustrated in Figure 28.

The tabs on the **View Profile** screen are as follows:

- Identity
- Professional Contact
- Certification
- Security
- Other Info

The Helpdesk will be able to choose any tab from the **View Profile** screen to view the appropriate user information. In addition, the **View Profile** screen provides the Helpdesk the ability to perform the standard help desk functions in every tab.

Once the **View** button is selected, the **Identity** tab will be the first tab displayed and this tab will include the user account information, as illustrated in Figure 28.

The illustrations below show how the Helpdesk could navigate through the various tabs on the **View Profile** screen and view the relevant account information in each tab.”

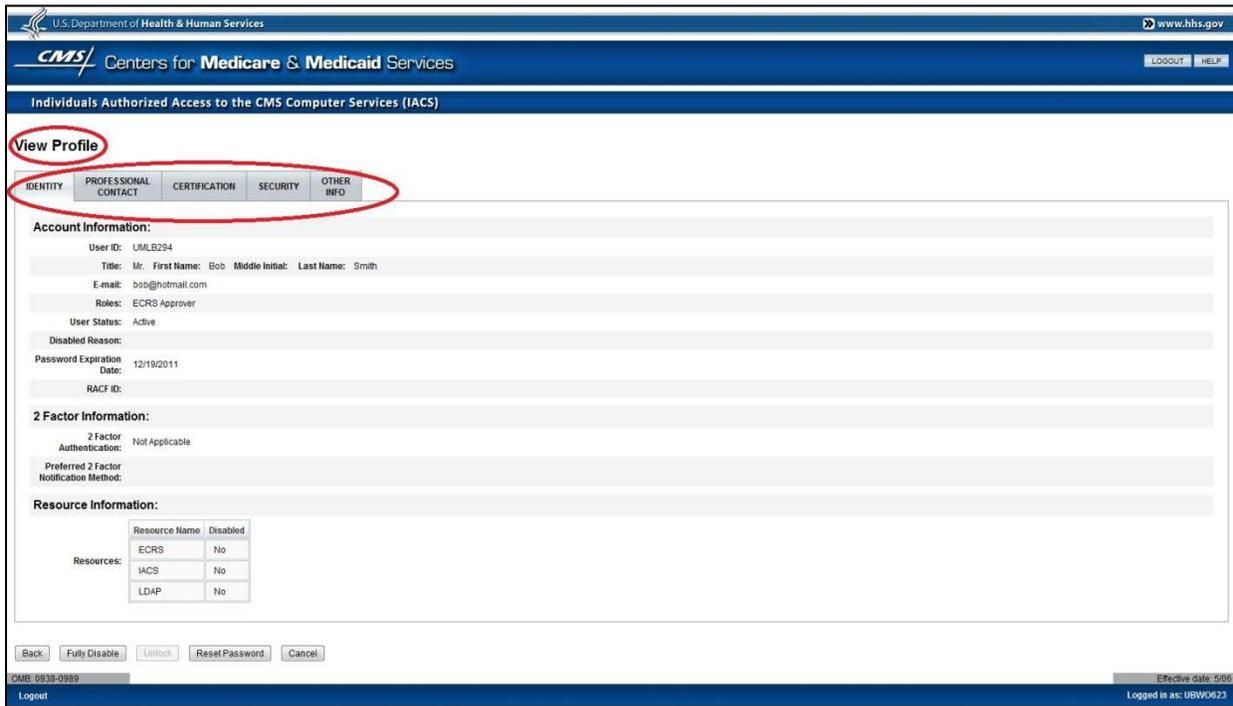


Figure 28: View Profile Screen – Identity Tab

**Action:** Select the *Professional Contact* tab.

The Professional Credentials and Company information will display as illustrated in Figure 29.

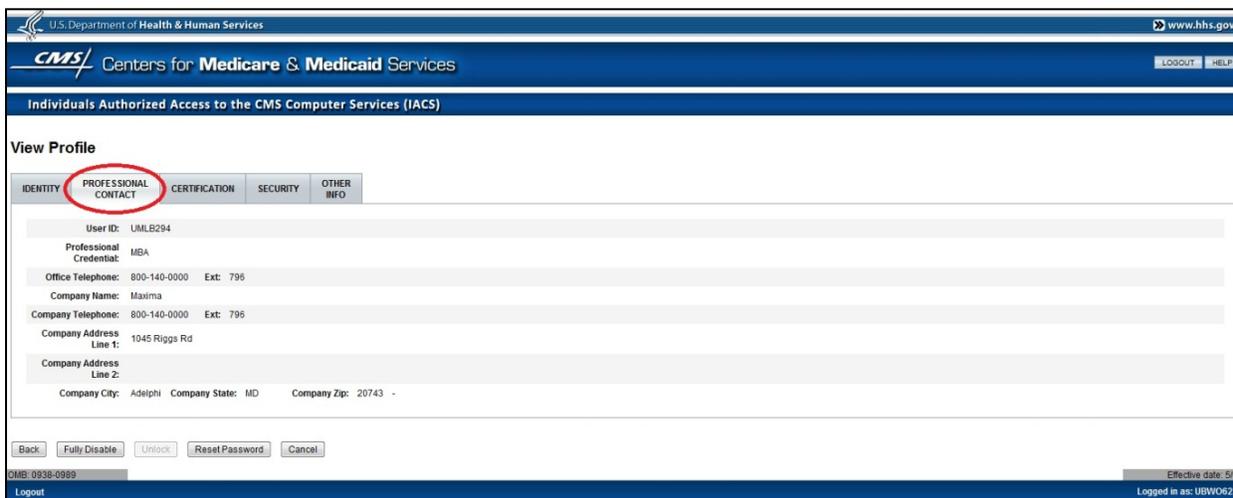


Figure 29: View Profile Screen – Professional Contact Tab

**Action:** Select the *Certification* tab.

The user's Certification information will display as illustrated in Figure 30.



Figure 30: View Profile Screen – Certification Tab

**Action:** Select the **Security** tab.

The user's security information, authentication questions, and answers will display as illustrated in Figure 31.

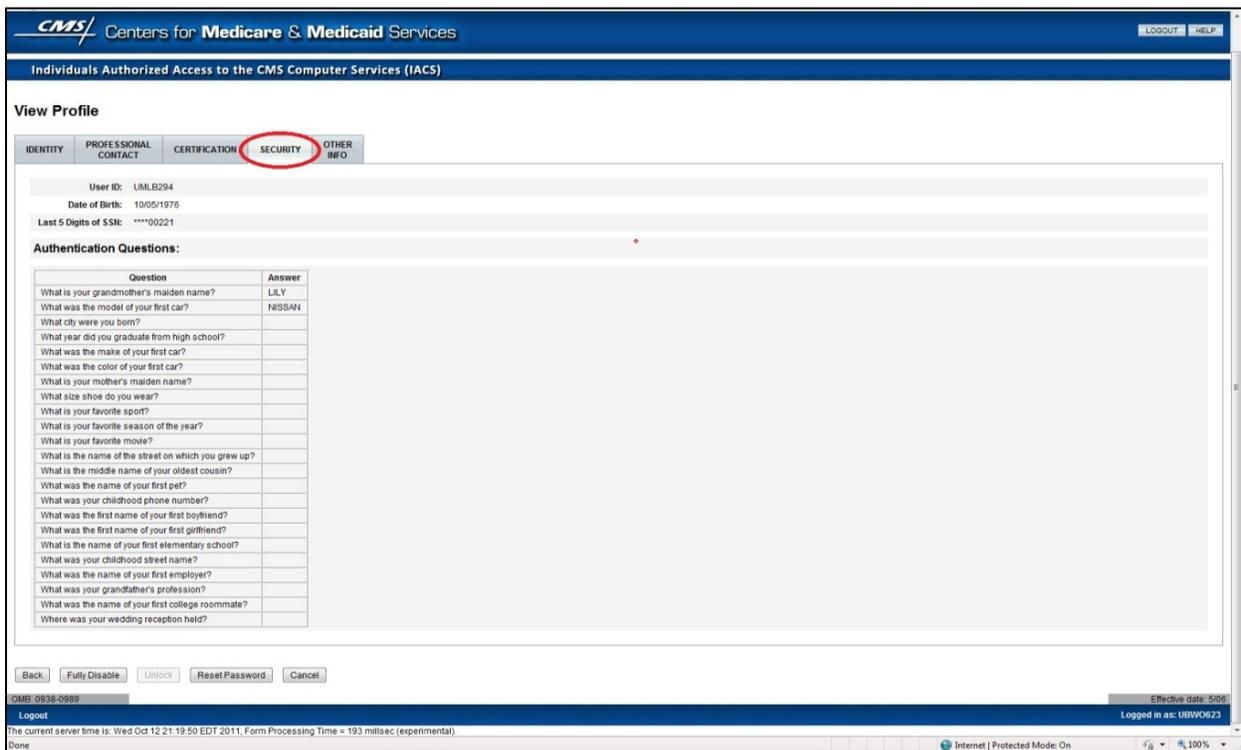


Figure 31: View Profile Screen – Security Tab

If the user selects the **Back** button, the user will be returned to the **Manage users under my authority – Search Results** screen.

If the user selects the **Cancel** button, the user will be returned to the **My Profile** screen.

The **Other Info** tab on the **View Profile** screen will display the application specific user information, for example, Organization Information. Application specific information will not be applicable to all applications or to some roles within an application. ECRS Application does not have any application specific user information to be displayed. PS&R/STAR Helpdesk will be able to view the Organization information and CMS Certification Number (CCN), or Medicare Contractor ID as appropriate.

### 4.2.3 Disable User Account

Helpdesks can disable user accounts within their scope of responsibility using the **Fully Disable** button from the **Manage users under my authority – Search Results** screen.

**Action:** From the **Manage users under my authority** screen, select the user you want to fully disable by selecting the radio button to the left of the user account, as illustrated in Figure 32.

The screenshot shows the 'Manage users under my authority' interface. The search criteria section includes fields for User Id(s), First Name, Last Name, Application, and Email. The search results table lists 22 users, with the user 'UMLB294' highlighted in red. The 'Fully Disable' button is also highlighted in red.

Select	User Id	First Name	Last Name	Email	Role	User Status
<input type="radio"/>	OZTJ421	ispny	Smith	alydps@ctfuov.com	ECRS Approver	Active
<input type="radio"/>	OZQ0674	jhdeat	Smith	SANJ_ECRS_5@YAHOO.COM	ECRS Approver	Partially Disabled
<input type="radio"/>	RGK1474	lljqag	Smith	Approver@test.org	ECRS Approver	Partially Disabled
<input type="radio"/>	TAL615	vaimt	Smith	dbdcs@jngbw.com	ECRS Approver	Partially Disabled
<input type="radio"/>	TBGB939	xfsvo	Smith	sira231@gmail.com	ECRS Approver	Active
<input type="radio"/>	THRI973	xplptq	Smith	sooasy@nliblq.com	ECRS Approver	Fully Disabled, Locked
<input checked="" type="radio"/>	UMLB294	Bob	Smith	bob@hotmail.com	ECRS Approver	Active
<input type="radio"/>	VBX131	teuawo	Smith	rdfqsv@gvmhak.com	ECRS Approver	Active
<input type="radio"/>	WEI437	wmkyj	Smith	viewp@wzzaat.com	ECRS Approver	Partially Disabled
<input type="radio"/>	XLZA300	MimMAApprover	Smith	MimMAApprover@test.org	ECRS Approver	Partially Disabled

Figure 32: Manage Users Under My Authority Screen – Fully Disable Option

**Action:** Select the **Fully Disable** button.

The **Disable Account** screen will display as illustrated in Figure 33.

**Note:** The **Fully Disable** button will not be active when the user status is 'Fully Disabled'.

Figure 33: Disable Account Screen

**Action:** Enter a justification statement in the *Justification for Action* field. This field must include the reason for disabling the user.

**Action:** Select the **Submit** button at the bottom of the screen.

The **Disable Account Acknowledgement** screen will display as illustrated in Figure 34.

If the user selects the **Back** button, the user will be returned to the **Manage users under my authority – Search Results** screen.

If the user selects the **Cancel** button, the user will be returned to the **My Profile** screen.

Figure 34: Disable Account Acknowledgement Screen

The **Disable Account Acknowledgement** screen will display a message that the account was disabled successfully.

**Action:** Select the **OK** button at the bottom of the screen.

The Helpdesk will be returned to the **Search Results** on the **Manage users under my authority** screen. The Search Results will display the user's status as 'Fully Disabled' under the *User Status* column, as illustrated in Figure 35.

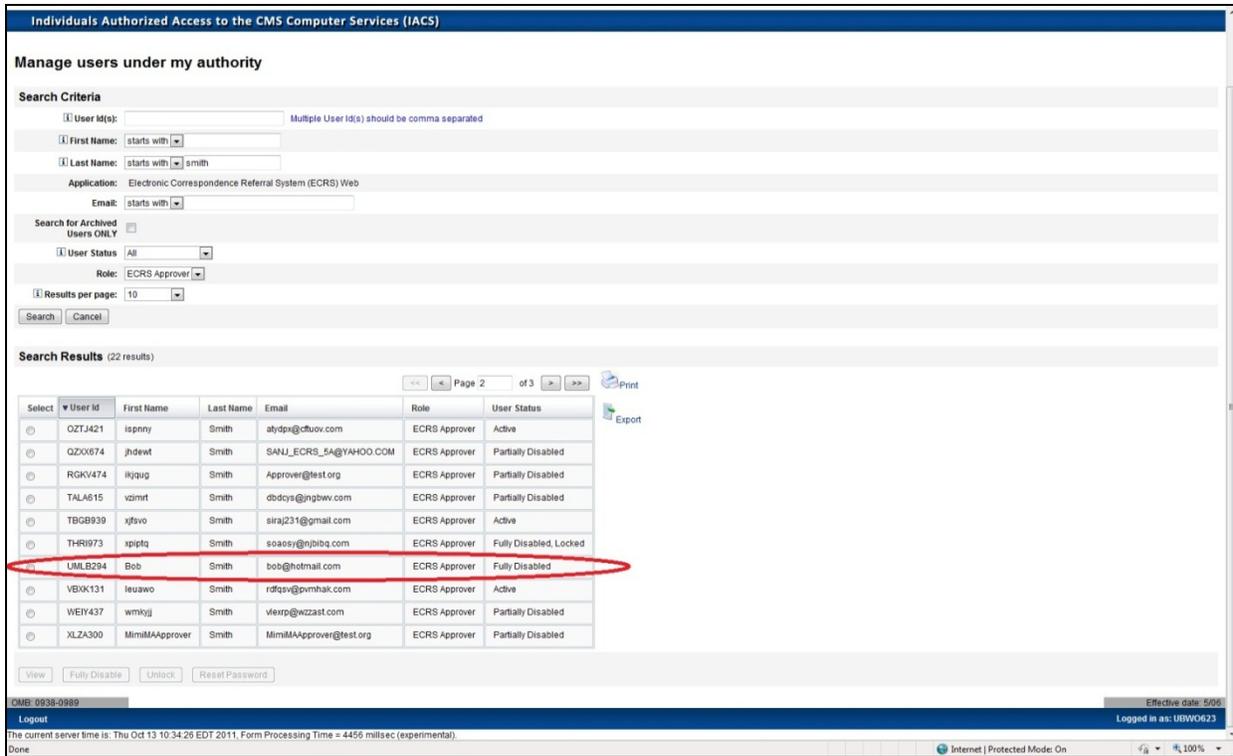


Figure 35: Manage Users Under My Authority Screen – Shows User (Fully Disabled)

#### 4.2.4 Reset User Password

Helpdesks can reset the password for user accounts within their scope of responsibility using the **Reset Password** button from the **Manage users under my authority – Search Results** screen. Once the password is reset, the user will receive an E-mail notification with a one-time password. IACS requires the user to change the temporary password at the time of login.

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

CMS Centers for Medicare & Medicaid Services  
LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

Manage users under my authority

Search Criteria

User Id(s): Multiple User Id(s) should be comma separated

First Name: starts with

Last Name: starts with

Application: Electronic Correspondence Referral System (ECRS) Web

Email: starts with

Search for Archived Users ONLY

User Status: All

Role: ECRS User

Results per page: 10

Search Cancel

Search Results (14 results)

Page 2 of 2

Select	User Id	First Name	Last Name	Email	Role	User Status
<input type="checkbox"/>	REEE073	mgrmm	Smith	yghhbq@wsykm.com	ECRS User	Active
<input type="radio"/>	WDOA540	Jojo	Smith	Jojo@hotmail.com	ECRS User	Active
<input type="checkbox"/>	ZMPO814	PDPSubECRS	Smith	PDPSubECRS@test.org	ECRS User	Partially Disabled
<input type="checkbox"/>	ZZRK301	hvmfpj	Smith	joigns@dqlarm.com	ECRS User	Active

View Fully Disable Unlock **Reset Password**

OMB: 0938-0989 Effective date: 5/06  
Logout Logged in as: UBWO623  
The current server time is: Thu Oct 13 10:46:55 EDT 2011, Form Processing Time = 1287 msec (experimental)

**Figure 36: Manage Users Under My Authority Screen – Reset Password Option**

**Action:** From the **Manage users under my authority** screen, select the radio button to the left of the user account to reset the password, as illustrated in Figure 36.

**Action:** Select the **Reset Password** button.

The **Reset Account Password** screen will display as illustrated in Figure 37.

**Note:** The **Reset Password** button will not be active when the user status is 'Fully Disabled'.

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

CMS Centers for Medicare & Medicaid Services  
LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

**Reset Account Password**

User ID: WDOA540

Applications: Electronic Correspondence Referral System (ECRS) Web

Roles: ECRS User

Resources: IACS, ECRS, LDAP

Back Submit Cancel

OMB: 0938-0989 Effective date: 5/06  
Logout Logged in as: UBWO623

**Figure 37: Reset User Password Screen**

**Action:** Select the **Submit** button at the bottom of the screen.

If the user selects the **Back** button, the user will be returned to the **Manage users under my authority – Search Results** screen.

If the user selects the **Cancel** button, the user will be returned to the **My Profile** screen.



**Figure 38: Reset Account Password Acknowledgement Screen**

The **Reset Account Password Acknowledgement** screen will display a message that the password was reset successfully.

**Action:** Select the **OK** button at the bottom of the screen.

**Note:** An E-mail will be sent to the user with a random one-time password once the password reset process completes.

The Helpdesk will be returned to the search results on the **Manage users under my authority** screen, as illustrated in Figure 25.

#### 4.2.5 Unlock User Account

Helpdesks can unlock a user's account within their scope of responsibility using the **Unlock** button from the **Manage users under my authority – Search Results** screen. The helpdesk needs to first verify that the user's account status is shown as 'Locked', as illustrated in Figure 39.

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

CMS Centers for Medicare & Medicaid Services  
LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

Manage users under my authority

Search Criteria

User Id(s): Multiple User Id(s) should be comma separated

First Name: starts with

Last Name: starts with | smith

Application: Electronic Correspondence Referral System (ECRS) Web

Email: starts with

Search for Archived Users ONLY

User Status: All

Role: ECRS User

Results per page: 10

Search Cancel

Search Results (14 results)

Page 2 of 2

Select	User Id	First Name	Last Name	Email	Role	User Status
<input type="checkbox"/>	REEE073	mgrmm	Smith	yghhbq@wsykjm.com	ECRS User	Active
<input checked="" type="checkbox"/>	WDOA540	Jojo	Smith	Jojo@hotmail.com	ECRS User	Active, Locked
<input type="checkbox"/>	ZMPO814	PDPSubECRS	Smith	PDPSubECRS@test.org	ECRS User	Partially Disabled
<input type="checkbox"/>	ZZFR301	hvmfpj	Smith	joigns@dqlarm.com	ECRS User	Active

View Fully Disable Unlock Reset Password

OMB: 0938-0989 Effective date: 5/06  
Logout Logged in as: UBWO623

The current server time is: Thu Oct 13 10:55:27 EDT 2011, Form Processing Time = 1157 msec (experimental).

Figure 39: Manage Users Under My Authority Screen – Unlock Option

**Action:** Select the radio button to the left of the user record you want to unlock.

**Action:** Select the **Unlock** button.

An **Unlock Account** screen will display as illustrated in Figure 40.

**Note:** The **Unlock** button will not be active when the user status is not 'Locked' or 'Fully Disabled'.

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

CMS Centers for Medicare & Medicaid Services  
LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

**Unlock Account**

User ID: WDOA540

Applications: Electronic Correspondence Referral System (ECRS) Web

Roles: ECRS User

Resources: IACS, ECRS, LDAP

Back Submit Cancel

OMB: 0938-0989 Effective date: 5/06  
Logout Logged in as: UBWO623

Figure 40: Unlock Account Screen

**Action:** Select the **Submit** button at the bottom of the screen.

If the user selects the **Back** button, the user will be returned to the **Manage users under my authority – Search Results** screen.

If the user selects the **Cancel** button, the user will be returned to the **My Profile** screen.

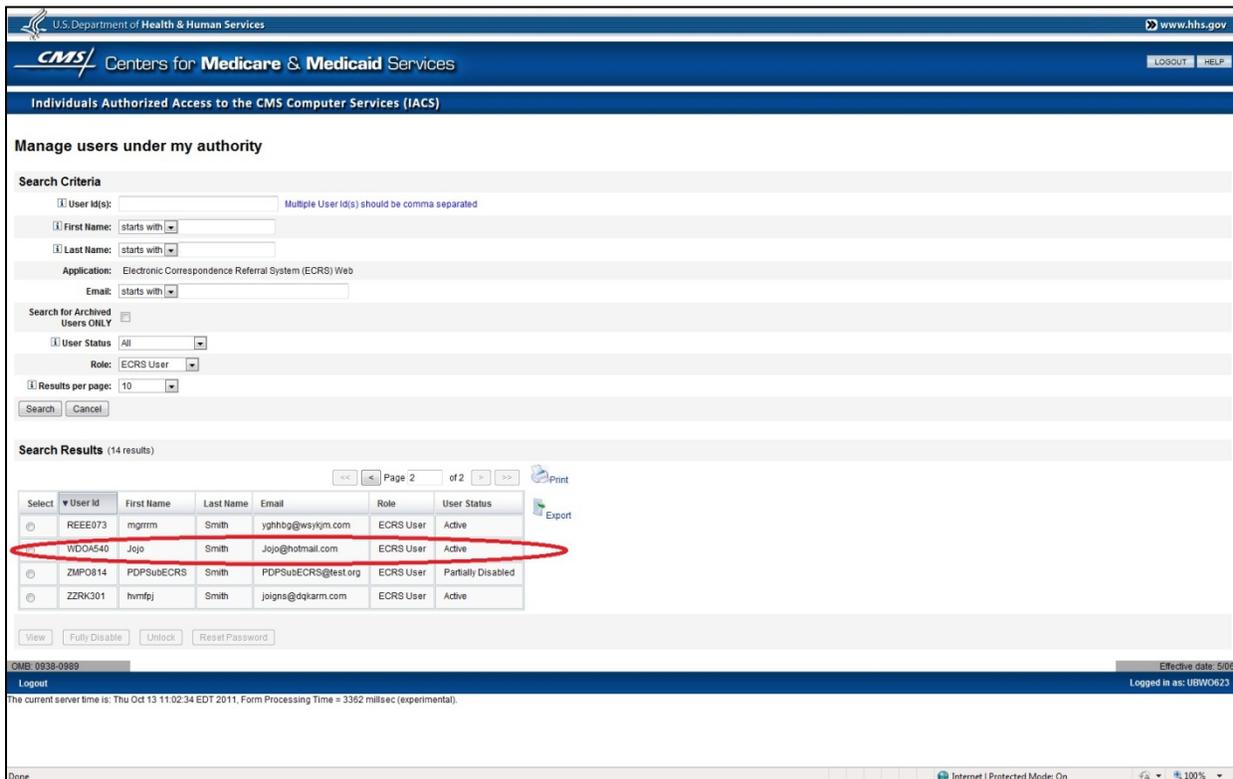


**Figure 41: Unlock Account Acknowledgement Screen**

The **Unlock Account Acknowledgement** screen will display a message that the account was unlocked successfully, as illustrated in Figure 41.

**Action:** Select the **OK** button at the bottom of the screen.

The helpdesk will be returned to the **Search Results** on the **Manage users under my authority** screen. The search results will display the user’s status as ‘Active’ under the *User Status* column, as illustrated in Figure 42.



**Figure 42: Manage Users Under My Authority Screen – Shows User (Active)**

### 4.3 Helpdesks Functioning as Authorizers

Some Helpdesks are at the top of the chain of trust and function as Authorizers of users with Approver roles. The Helpdesks of the Applications listed below in

Table 3 follow this standard and approve the new users' registration, profile modification, and annual certification requests of the users under their approval authority.

Application	Help Desk Role	Supporting Help Desk
CSP - MCSIS	MCSIS Help Desk User	MCSIS Help Desk
CSP – HSTP	HSTP Help Desk User	HSTP Help Desk
ECRS	ECRS HelpDesk	ECRS Help Desk
GENTRAN	Gentran Helpdesk	IACS Administration
Internet Server	Internet Server Help Desk	IACS Administration
MDR	Helpdesk	MAPD Help Desk
MED	MED Help Desk User	EUS Help Desk
PS&R/STAR	PS&R/STAR Helpdesk	EUS Help Desk

**Table 3: Applications and the corresponding Helpdesks with Approval Authority**

For more details on the processes of Approving New User requests, Modify Profile requests and Annual Certification requests, refer to the **IACS User Guide for Approvers**.

### 4.4 Exceptions to Help Desk Functions

#### 4.4.1 Exceptions for CBIC Tier-1 Help Desk

- **Approve Users**  
The CBIC Tier-1 Help Desk cannot approve the users under their scope of responsibility.
- **Manage users under my authority**  
The CBIC Tier-1 Help Desk does not have the capability to use the Manage users under my authority function.

#### 4.4.2 Exceptions for CBIC Tier-2 Help Desk

- **Approve Users**  
The CBIC Tier-2 Help Desk cannot approve the users under their scope of responsibility.
- **Manage users under my authority**  
The CBIC Tier-2 Help Desk does not have the capability to use the Manage users under my authority function.
- **Search Users**

The CBIC Tier-2 Help Desk can search for a DMEPOS user by using the Provider Transaction Access Number (PTAN).

- **Modify Users**  
The CBIC Tier-2 Help Desk can view and modify the Provider Transaction Access Number (PTAN) details for an Authorized Official (AO).
- **Create Organization and Associate Users to an Organization**  
The CBIC Tier-2 Help Desk can create and/or associate DMEPOS Users with one or more DMEPOS organizations, one-at-a-time. DMEPOS organizations are uniquely identified by the PTAN.
- **Disassociate from the Role**  
The CBIC Tier-2 Help Desk can disassociate the users from their DMEPOS roles. Once disassociated, the users are disassociated from their role and their PTAN associations are removed from their IACS profile. An AO can only be disassociated from the AO role if the individual is the only user registered in IACS for the PTAN organization.
- **Disassociate from the PTAN**  
The CBIC Tier-2 Help Desk can disassociate the users from their organizations (identified by PTAN). Once disassociated, the users' PTAN associations are removed from their IACS profiles, but their DMEPOS role remains the same.
- **Promote a Backup Authorized Official to an Authorized Official**  
The CBIC Tier-2 Help Desk can promote a Backup Authorized Official (BAO) to an Authorized Official. As part of this process, IACS will check if the BAO to be promoted is associated with all PTANs of the AO, in which case the promotion will proceed. The original AO is disassociated from all of his PTAN associations when this action is confirmed. IACS will prevent the promotion of the BAO to the AO if the BAO is not associated with all PTANs of the AO, and an appropriate error message will be displayed.

#### 4.4.3 Exceptions for MAPD Help Desk

- **Approve Users**  
The MAPD Help Desk cannot approve the users under their scope of responsibility.
- **Manage users under my authority**  
The MAPD Help Desk will only be able to Search and List User Accounts under their scope of responsibility by using the [Manage users under my authority](#) hyperlink on the **My Profile** screen.

#### 4.4.4 Exceptions for MAPD Help Desk Admin

- **Approve Users**  
The MAPD Help Desk Admin cannot approve the users under their scope of responsibility from the **My Profile** page.

- **Approver**  
The MAPD Help Desk Admin has the capability to approve pending requests for the applications he supports using the IACS Administrative console.
- **Assign User Capabilities**  
The MAPD Help Desk Admin can assign any of the Helpdesk privileges to another IACS user who is under their scope of responsibility.
- **Update User**  
The MAPD Help Desk Admin can edit and save changes to the user profile for any of the assigned resources.
- **Manage users under my authority**  
The MAPD Help Desk Admin will only be able to Search and List User Accounts under their scope of responsibility by using the [Manage users under my authority](#) hyperlink on the **My Profile** screen.

#### 4.4.5 Exceptions for LSA

- **Approve Users**  
The LSA cannot approve the users under their scope of responsibility.
- **Manage users under my authority**  
The LSA will only be able to Search and List User Accounts under their scope of responsibility by using the [Manage users under my authority](#) hyperlink on the **My Profile** screen.

#### 4.4.6 Exceptions for COB Help Desk

- **Approve Users**  
The COB Help Desk cannot approve the users under their scope of responsibility.
- **Manage users under my authority**  
The COB Help Desk will only be able to Search and List User Accounts under their scope of responsibility by using the [Manage users under my authority](#) hyperlink on the **My Profile** screen.

#### 4.4.7 Exceptions for PQRI Help Desk

- **Approver**  
The PQRI Help Desk has the capability to approve pending requests for the applications he supports using the IACS Administrative console.
- **Manage users under my authority**  
The PQRI Help Desk will only be able to Search and List User Accounts under their scope of responsibility by using the [Manage users under my authority](#) hyperlink on the **My Profile** screen.
- **E-mail User Report**

The PQRI Help Desk has the ability to generate a report for all or a subset of PQRS/eRx Application users from the **E-mail User Report** screen. The helpdesk can access this screen by selecting the hyperlink [E-mail User Report](#) from the **My Profile** screen. The report will be sent as an E-mail attachment to the helpdesk who requested the report.

#### 4.4.8 Exceptions for MEIC (now known as MCARE) Helpdesk

- **Approver**  
The MEIC Helpdesk has the capability to approve pending requests for the applications he supports using the IACS Administrative console.
- **Run Task Report**  
The MEIC Helpdesk has the ability to run IDM Task Reports from the IACS Administrative console.
- **Run Audit Report**  
The MEIC Helpdesk has the ability to run IDM Audit reports from the IACS Administrative console.
- **User Report Admin**  
The MEIC Helpdesk has the ability to run reports on users belonging to an Organization from the IACS Administrative console.
- **Manage users under my authority**  
The MEIC Helpdesk will only be able to Search and List User Accounts under their scope of responsibility by using the [Manage users under my authority](#) hyperlink on the **My Profile** screen.

## 5.0 Troubleshooting and Support

### 5.1 Frequently Asked Questions

1. *As a Helpdesk, can I fully disable a user who has more than one application role?*

Yes. As a Helpdesk you may fully disable a user under the scope of your responsibility, even if the user has roles in other applications.

Helpdesks will be able to perform this function using the IACS Admin console or the Manage user under my authority help desk function if applicable. No matter what mode is used, the Fully Disable action will disable the user in all applications. The Manage users under my authority help desk function also warns the Helpdesk when he performs the Fully Disable action on the user by displaying a message stating that the user has roles in other applications and the Fully Disable action will disable the user in all those applications. If the Helpdesk proceeds with the action, IACS will fully disable the user and send an E-mail notification to the other Application Helpdesks. When using the IACS Admin Console, the warning will not be displayed and the E-mail notification will not be sent. Once the user is fully disabled, then the user will not be able to log in to any CMS application that the user could previously access.

2. *As an MCARE Helpdesk how can I get the HPG User's Submitter ID modified since the user cannot do that using self-service?*

As an MCARE helpdesk, you are not authorized to modify a user's Submitter ID using the IACS Administrative Console; only the IACS Administrators have the capability to add or modify the Submitter ID. You should open a Service Request directed to the IACS Administrators with the Submitter ID information. If your intention is to remove the Submitter ID from a HPG User's profile, then you could do that by using the Manage users under my authority function.

3. *As a Helpdesk how do I handle requests from users to change their First Name, Last Name or Date of Birth?*

Users cannot modify their First Name, Last Name and Date of Birth fields in their IACS user profile due to security reasons. As a Helpdesk, you are not authorized to modify the user's profile; only the IACS Administrators have the capability to modify the user information mentioned above. You should open a Service Request directed to the IACS Administrators with the user's request. IACS Administrators will be able to edit the user's profile and modify the requested information.

4. *How can a user enable himself if he is partially disabled?*

CMS requires inactive accounts to be disabled. The account will be considered inactive if the user has not logged in for 180 days. The user's account will be partially disabled and the user will be unable to access any application. But a partially disabled user can enable himself using the self-service functionality. Helpdesks can advise the user to enable himself by using the steps below:

1. Navigate to <https://applications.cms.hhs.gov>.
2. Select the [Account Management](#) hyperlink in either the white space in the center of the screen or in the menu bar toward the top of the screen.
3. Select the [My Profile](#) hyperlink in the **Account Management** screen.
4. Accept the Terms and Conditions.
5. Log in using the User ID and Password.
6. When prompted, answer the Security Questions and Authentication Questions.
7. Change the Password.

If the user is not prompted to answer the Security Questions and Authentication Questions, then he must contact his helpdesk.

5. *As a PS&R/STAR Helpdesk, how can I view the CMS Certification Number (CCN) of the user's associated organization?*

The organization's CCN information can be found in the **Other Info** tab on the **View Profile** screen using the Manage users under my authority function. From the **Manage users under my authority** screen search the user for who you want to view the CCN information. After execution of the search, you should select the user from the search results and select the **View** button to view the details of the user's account. The **View Profile** screen – **Identity** tab will display. From the **View Profile** screen, select the **Other Info** tab to view the user's CCN(s) information.

6. *As a PS&R/STAR Helpdesk or PQRI Helpdesk, how can I promote a Backup Security Official of an organization to the Security Official role?*

You cannot promote a Backup Security Official to a Security Official of an organization. The Backup Security Official will need to request the Security Official role by modifying his profile. IACS routes the role request to the Helpdesk for approval. An Organization is allowed to have only one Security Official. Following your approval, the Backup Security Official will no longer have his current role of Backup Security Official and will acquire the new role of Security Official for the Organization.

**Note:** End Users of a given organization can also request and acquire the role of Security Official of the organization upon Helpdesk approval.

7. *As a Helpdesk, how can I add or remove roles of the users under my scope of responsibility?*

As a Helpdesk, you are not allowed to add or remove the role(s) of users under your scope of responsibility. IACS allows the users to disassociate from their role using the Modify Account Profile function without the need for an approval. The Help desk functions that you can perform are Search and List user accounts, View user accounts, Reset user accounts password, Unlock user accounts, and Disable user accounts.

8. *What is the reason for the 'Last Password Change Date' being blank for some users in the PQRS User Report?*

The PQRS User Report will display the date the users last changed their password in the Last Password Change Date column. The Last Password Change Date column in the report will be blank for users under following conditions:

1. A new user to IACS who has received his first time User ID / Password and has not changed his password.
2. An existing user had requested a password reset within the first 60 days since his IACS User account has been established and has not logged in with his temporary password.

**Note:** The following fields in the PQRS User Report will be blank if the user exists only in the IPC resource and not in IACS: User Status, Last Password Change Date, Create Date, and Last Certification Date.

## 5.2 Support

There are multiple Application Helpdesks that support IACS Users. This section provides the contact information for the corresponding Helpdesks.

**Note:** For a most recent list of Helpdesks and their contact information, refer to the **Help Resources** area of the **Account Management** screen on the CMS website.

The Helpdesk associated with **COB** is the MAPD Help Desk. The phone number is 1-800-927-8069. They can be contacted at [mapdhelp@cms.hhs.gov](mailto:mapdhelp@cms.hhs.gov). Their hours of operation are Monday-Friday 6am to 9pm Eastern Standard Time, EST.

The Helpdesk associated with **CSP-HSTP** is the HSTP Help Desk. The phone number is 1-410-786-0166. They can be contacted at [HSTP\\_Application\\_Support@cms.hhs.gov](mailto:HSTP_Application_Support@cms.hhs.gov).

The Helpdesk associated with **CSP-MCSIS** is the MCSIS Help Desk. The phone number is 1-410-786-6693. They can be contacted at [MCSIS\\_Application\\_Support@cms.hhs.gov](mailto:MCSIS_Application_Support@cms.hhs.gov).

The Helpdesk associated with **CSR** is the MAPD Help Desk. The phone number is 1-800-927-8069. They can be contacted at [mapdhelp@cms.hhs.gov](mailto:mapdhelp@cms.hhs.gov). Their hours of operation are Monday-Friday 6am to 9pm Eastern Standard Time, EST.

For **Electronic Health Record Demonstration System (EHRDS)** questions and concerns, direct questions to the EHRDS mailbox at [EHR\\_Demo\\_Application\\_Support@cms.hhs.gov](mailto:EHR_Demo_Application_Support@cms.hhs.gov)

The Helpdesk associated with the **DMEPOS Bidding System** is the Competitive Bid Implementation Contractor (CBIC) Helpdesk. The phone number is 1-877-577-5331. They can be contacted at [CBIC.admin@palmettogba.com](mailto:CBIC.admin@palmettogba.com).

The Helpdesk associated with **ECRS** is the EDI Help Desk. The phone number is 1-646-458-6740. They can be contacted at [ecrshelp@hmedicare.com](mailto:ecrshelp@hmedicare.com).

For **GENTRAN** login issues, IACS Administrators can be contacted at [iacs\\_admin@cms.hhs.gov](mailto:iacs_admin@cms.hhs.gov).

The Helpdesk associated with **HETS UI** is the MCARE Help Desk. The phone number is 1-866-440-3805. The fax number is 1-615-238-0822. They can be contacted at [mcare@cms.hhs.gov](mailto:mcare@cms.hhs.gov).

The Helpdesk associated with **HPG** is the MCARE Help Desk. The phone number is 1-866-440-3805. The fax number is 1-615-238-0822. They can be contacted at [mcare@cms.hhs.gov](mailto:mcare@cms.hhs.gov).

**Internet Server** users with login issues may contact IACS Administration at [iacs\\_admin@cms.hhs.gov](mailto:iacs_admin@cms.hhs.gov).

The Helpdesk associated with **Medicare Advantage/Prescription Drug Plans** is the MAPD Help Desk. The phone number is 1-800-927-8069. They can be contacted at [mapdhelp@cms.hhs.gov](mailto:mapdhelp@cms.hhs.gov). Their hours of operation are Monday-Friday 6am to 9pm Eastern Standard Time, EST.

The Helpdesk associated with **Medicare Drug Rebate** is the MDR Help Desk. The phone number is 1-800-927-8069. They can be contacted at [mapdhelp@cms.hhs.gov](mailto:mapdhelp@cms.hhs.gov). Their hours of operation are Monday-Friday 6am to 9pm Eastern Standard Time, EST.

The Helpdesk associated with **Medicare Exclusion Database** is the MED Help Desk. The phone number is 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their E-mail address is [EUSupport@cgi.com](mailto:EUSupport@cgi.com). Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time, EST.

The Helpdesk associated with the **PQRS/eRx Application** is the Quality Net Help Desk. The phone number is 1-866-288-8912. They can be contacted at [qnetssupport@sdps.org](mailto:qnetssupport@sdps.org).

The Helpdesk associated with the **PS&R/STAR Application** is the External User Services (EUS) Help Desk. The phone number is 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their E-mail address is [EUSsupport@cqi.com](mailto:EUSsupport@cqi.com). Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time, EST.

## 6.0 Glossary

The following definitions are provided for terms used or implied in this User Guide as well as relevant cross references to additional terms that are used in those definitions.

Term	Definition
CMS	The Centers for Medicare & Medicaid Services- the Health and Human Services agency responsible for Medicare and parts of Medicaid.
DMEPOS	DMEPOS Bidding System (DBidS) - Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Bidding System- The DMEPOS Bidding System is for suppliers submitting a bid for selected products in a particular Competitive Bidding Area (CBA).
Fully Disabled	The user status of 'Fully Disabled' denotes that a user has been manually disabled by the Helpdesk or by an IACS Administrator for security reasons. The disabled user is removed from all resources. A disabled user will not be able to log into any of the IACS administered applications, or use IACS self-service features to reset the password or retrieve his IACS User ID. Only an IACS Administrator can enable a 'Fully Disabled' user.
HHS	The Department of Health and Human Services - a government agency that administers many of the "social" programs at the federal level dealing with the health and welfare of the citizens of the United States. HHS is the "parent" of CMS.
HIPAA	Health Insurance Portability And Accountability Act Of 1996 - a Federal law that allows persons to qualify immediately for comparable health insurance coverage when they change their employment relationships. Title II, Subtitle F, of HIPAA gives HHS the authority to mandate the use of standards for the electronic exchange of health care data; to specify what medical and administrative code sets should be used within those standards; to require the use of national identification systems for health care patients, providers, payers (or plans), and employers (or sponsors); and to specify the types of measures required to protect the security and privacy of personally identifiable health care information. Also known as the Kennedy-Kassebaum Bill, the Kassebaum-Kennedy Bill, K2, or Public Law 104-191.

Term	Definition
Locked	The user status is set to 'Locked' when the user failed to provide the correct User ID and / or Password after three consecutive login attempts. A 'Locked' user will not be able to access IACS unless he is unlocked, but will still be able to log into any IACS administered applications for which he has access rights. Users can wait until IACS automatically unlocks the account or contact the Helpdesk to unlock the account.
Medicaid	A joint federal and state program that helps with medical costs for some people with low incomes and limited resources. Medicaid programs vary from state to state, but most health care costs are covered for those who qualify for both Medicare and Medicaid.
Medicare	A federal health insurance program enacted in 1965 that is financed by a combination of payroll taxes, premium payments, and general federal revenues. This program provides health insurance to people age 65 and over, those who have permanent kidney failure requiring dialysis or transplant, and certain individuals under 65 with disabilities.
Partially Disabled	A user status is shown as 'Partially Disabled' when the user has not logged into the system for more than 180 days. A 'Partially Disabled' user cannot log into any application that he could previously access. A 'Partially Disabled' user can enable himself using the IACS self-service function or by contacting the Helpdesk.
Top of the Chain of Trust User	IACS uses a hierarchical system of approval for registration requests, profile modification requests, and annual certification requests referred to as the Chain of Trust. End User requests are approved by Approvers. Approvers are approved by Authorizers. In some applications, Helpdesks function as Authorizers. Authorizers are approved by the Business Owner or their designee. Business Owners typically do not have an IACS User ID. Thus, Authorizers are referred to as Top of the Chain Users, since they are the last users in the chain who must have an IACS User ID.

## 7.0 Acronyms

This section defines acronyms used or referenced in this document.

Acronym	Definition
AO	Authorized Official
BAO	Backup Authorized Official
CBIC	Competitive Bid Implementation Contractor
CC	Cost Contract
CCN	CMS Certification Number

Acronym	Definition
CHIP	Children's Health Insurance Program
CMS	The Centers for Medicare & Medicaid Services
COB	Coordination of Benefits
CSP	Center for Strategic Planning
CSR	Customer Service Representative
DBidS	Durable Medical Equipment, Prosthetics, Orthotics and Supplies (DMEPOS) Bidding System
DOB	Date of Birth
DMEPOS	Durable Medical Equipment, Prosthetics, Orthotics & Supplies
E CRS	Electronic Correspondence Referral System Web
EHRDS	Electronic Health Record Demonstration System
EST	Eastern Standard Time
EUS	External User Services
HETS UI	HIPAA Eligibility Transaction System User Interface
HIPAA	Health Insurance Portability and Accountability Act
HPG	HIPAA Eligibility Transaction System Provider Graphical User Interface
HSTP	Health System Tracking Project
IACS	Individuals Authorized Access to the CMS Computer Services
ID	Identification
IDM	Identity Management
ISV	Internet Server
IUI	Integrated User Interface
LSA	Local Service Administrator
MA	Medicare Advantage
MAPD	Medicare Advantage Prescription Drug
MCARE	Medicare Customer Assistance Regarding Eligibility
MCSIS	Medicaid and Children's Health Insurance Program (CHIP) State Information Sharing System

Acronym	Definition
MDR	Medicaid Drug Rebate
MED	Medicare Exclusion Database
MEIC	The Medicare Eligibility Integration Contractor
NIST	National Institute of Standards and Technology
PDP	Prescription Drug Plan
PQRI	Physician Quality Reporting Initiative
PQRS/eRX	Physician Quality Reporting System and E-Prescribing Incentive Programs
PS&R/STAR	Provider Statistical and Reimbursement /System for Tracking Audit and Reimbursement
PTAN	Provider Transaction Access Number
QNet	Quality Net
SSN	Social Security Number
UI	User Interface