



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

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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 CMS Help Desks** establishes the procedures for Help Desk 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)**
- **Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Bidding System(DBidS)**
- **Electronic Correspondence Referral System (ECRS)**
- **Gentran Application**
- **HIPAA Eligibility Transaction System User Interface (HETS UI)**
- **HIPAA Eligibility Transaction System Provider Graphical User Interface (HPG)**
- **Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts (MA/MA-PD/PDP/CC)**
- **Medicare Drug Rebate (MDR)**
- **Medicare Exclusion Database (MED)**
- **Physician Quality Reporting System and E-Prescribing Incentive Programs (PQRS/eRx)**
- **Provider Statistical and Reimbursement / System Tracking for 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) 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 Helpdesk** – provides account maintenance information for the Helpdesk staff supporting CMS applications integrated with IACS.

3.0 Overview

The sensitivity of CMS data and improved ability to access data, combine 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 policy
- Provide secure, high quality services to protect CMS systems and data
- Register users; control the distribution of User IDs and passwords, used to access to CMS web-based applications.

The **IACS User Guide for Help Desks** provides procedural information and representative screens that are common to supported Help Desks 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.

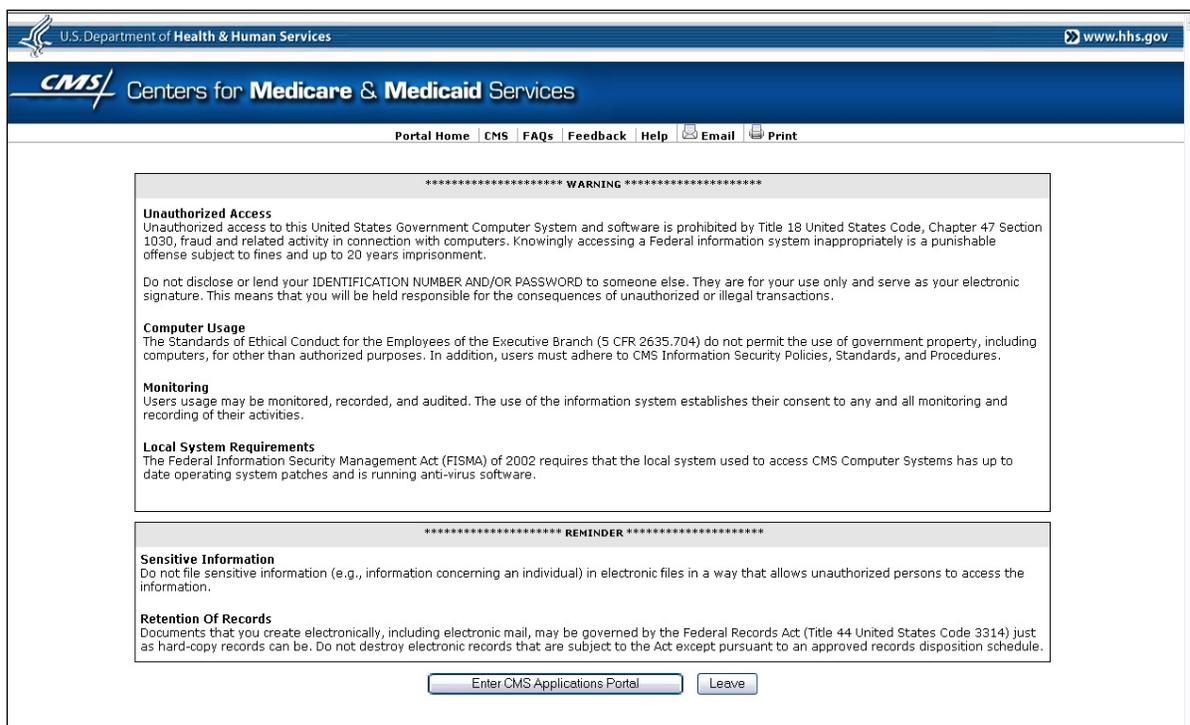


Figure 1: CMS Applications Portal WARNING/REMINDER Screen

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 these 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

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 if they want to print this information.

To accept, the user must select the **I Accept the above Terms and Conditions** box and indicate their 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 account registration 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 request desired accesses or 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 **CMS Applications Portal Introduction** screen will display as illustrated in Figure 100.

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*.

Or

As illustrated in Figure 1 – *The combination of Figure and Number is the link*.

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 registration and account modification 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 screen where an issue has been identified; and as caution messages which will require the user's action.

Additional examples of caution and warning messages are listed below.

The screenshot shows the 'New User Registration' form on the CMS website. At the top, there is a navigation bar with the U.S. Department of Health & Human Services logo and the URL www.hhs.gov. Below this is the CMS logo and the text 'Centers for Medicare & Medicaid Services'. The main heading is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. A yellow warning box with a red 'X' icon and the text 'Error' is displayed, stating: 'Please enter a valid Date of Birth in mm/dd/yyyy, m/d/yyyy, mmv/dyyyy or m/d/yyyy format.' The form itself is titled 'New User Registration' and has four tabs: 'New User Registration', 'Authentication Questions', 'Review Request', and 'Acknowledgement'. Below the tabs, a message states: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' The 'User Information' section contains several fields: Title (dropdown), First Name (Sandy), Last Name (Smith), Suffix (dropdown), Middle Initial (dropdown), Professional Credentials (text field with example MD, RN, LPN, MBA, PhD, etc.), Social Security Number (890-00-7865), Date of Birth (Jan 1 1990), E-mail (sandysm@com.org), Office Telephone (778-098-0987), Company Name (Sandy Hospital), Address 1 (2 main street), City (Ellicott City), State/Territory (MO), and Zip Code (21042). Asterisks indicate required fields.

Figure 3: Warning Message

The message 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.

Access Request

<input type="checkbox"/> Pending Requests:	Application	Request Number	Role	Type of Request
	Provider/Supplier	REQ-1246902049663-MODIFY	End User	Add Application/Community

Select Action: **Modify Demonstrations Profile**

Type of User: Demonstrations
EHRD User

There are no details to modify as part of the EHRD application.

* Indicates a required field

Cancel

Social Security Number: 123-33-4444 * Valid SSN Format is XXX-XX-XXXX Date of Birth: Jan 1 1960 * Valid Date of Birth format is mm/dd/yyyy

E-mail: pjones@bd.org * Confirm E-mail: pjones@bd.org *

Valid E-mail address format is user@internetprovider.domain. List of allowed domains: com, gov, net, org, us, mil, biz, edu, pro

* Indicates a required field

Next Cancel

Figure 4: Information Message

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

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

CMS Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

New User Registration

New User Registration Authentication Questions Review Request Acknowledgement

CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.

User Information

Title: [] First Name: Sandy * Last Name: Smith * Suffix: []

Middle Initial: [] Professional Credentials: [] Example: MD, RN, LPN, MBA, PhD, etc. (Limit 12 characters)

Social Security Number: 700-09-0982 * Valid SSN Format is XXX-XX-XXXX Date of Birth: [] * Valid Date of Birth format is mm/dd/yyyy

E-mail: sandys@com.org * Confirm E-mail: sandys@com.org *

Valid E-mail address format is user@internetprovider.domain. List of allowed domains: com, gov, net, org, us, mil, biz, edu, pro

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

Company Name: [] Company Telephone: [] Ext: []

Address 1: [] Address 2: []

City: [] State/Territory: [] Zip Code: [] - []

Access Request

User Type: MA/MA-PD/PDP/ICC

Role: [] *

Justification for Action: [] *

Message from webpage

Selecting OK will cancel your request. Are you sure you want to proceed?

OK Cancel

* Indicates a required field

Next Cancel

Internet | Protected Mode: On 100%

Figure 5: Caution Message

The message shown in Figure 5 cautions the user that the user's action will cancel the registration and allows the user to proceed by selecting the **OK** button or to stop by selecting the **Cancel** button.

4.0 Using the System – Managing Profiles

The following Section provides instructions for the most common Helpdesk functions using the ECRS Help Desk as an example. Helpdesk functions for the other helpdesk roles are not significantly different from those provided. Noteworthy differences for other roles will be identified in Section 4.3.

Table 1 shows all the Help desk 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-Tier2	CBIC 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
MA/MA-PD/PDP/CC	IUI Helpdesk MAPD Helpdesk MAPD Helpdesk Admin	MAPD Help Desk
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

The Help Desk users can perform the following account maintenance functions from IACS.

- 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.
- Manage Users under their Authority
 - View all users under their scope of responsibility
 - View all the Archived users

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

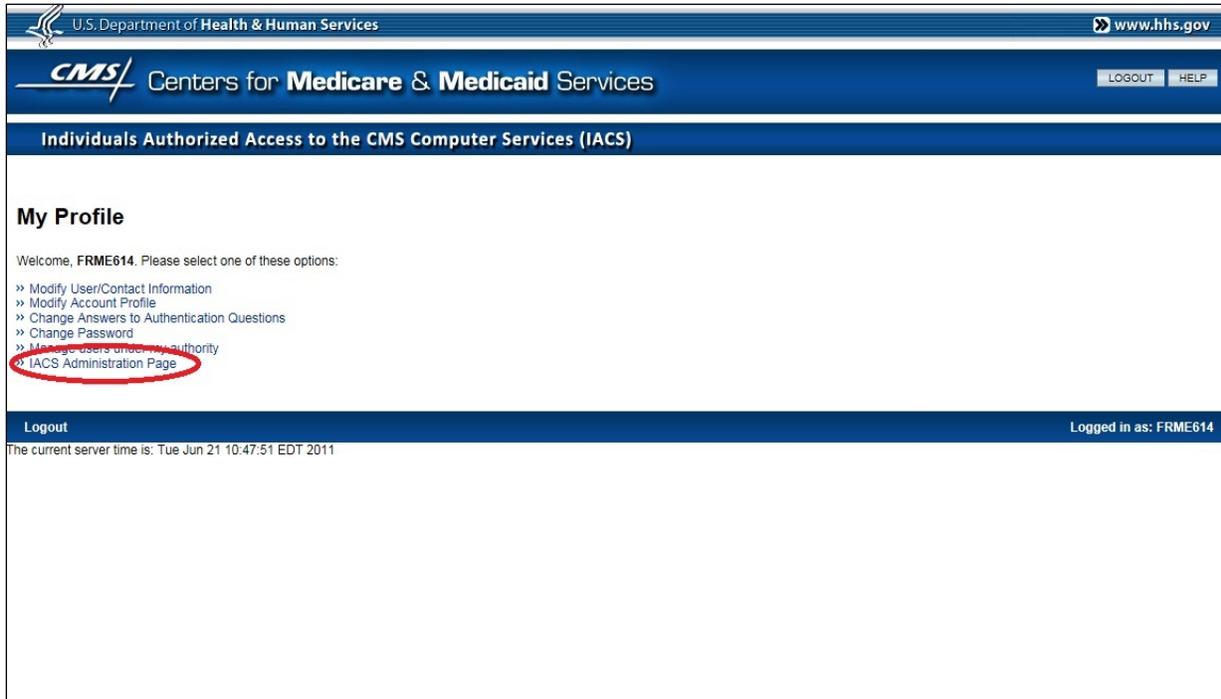


Figure 6: My Profile Screen

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

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

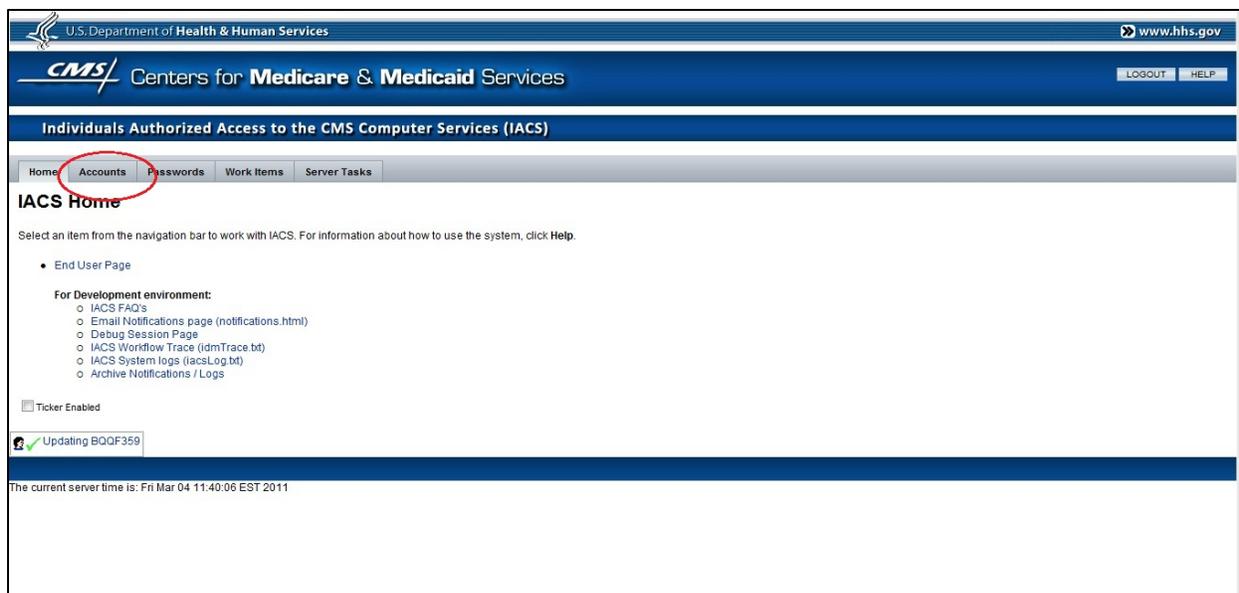


Figure 7: IACS Home Screen

4.1.1 Searching for User Accounts

The Help Desk User must log in 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.

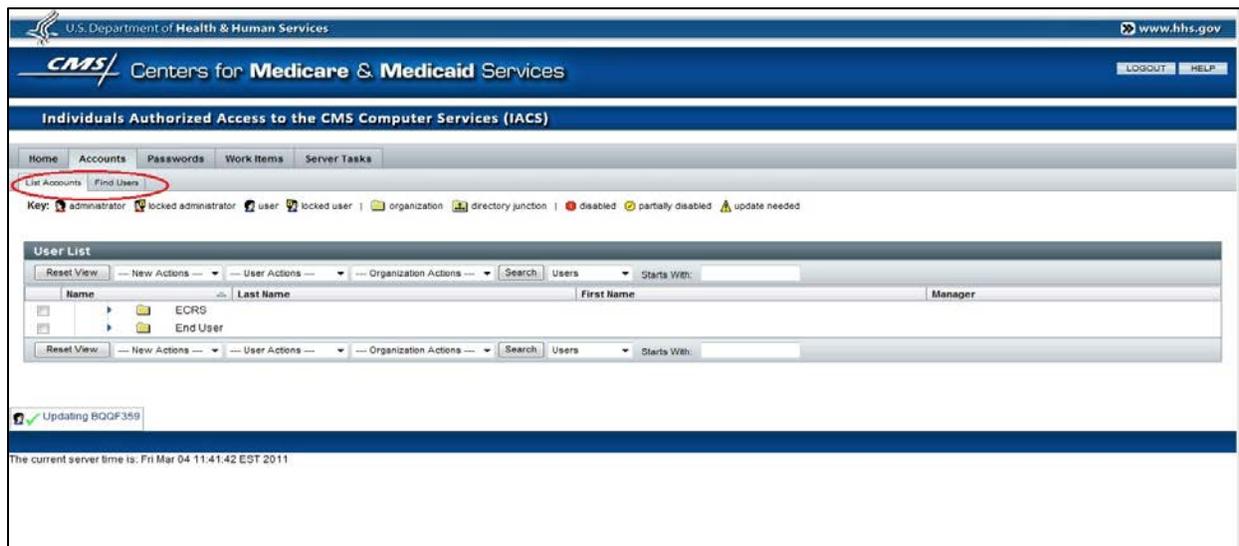


Figure 8: IACS Accounts Screen – Find Users

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.

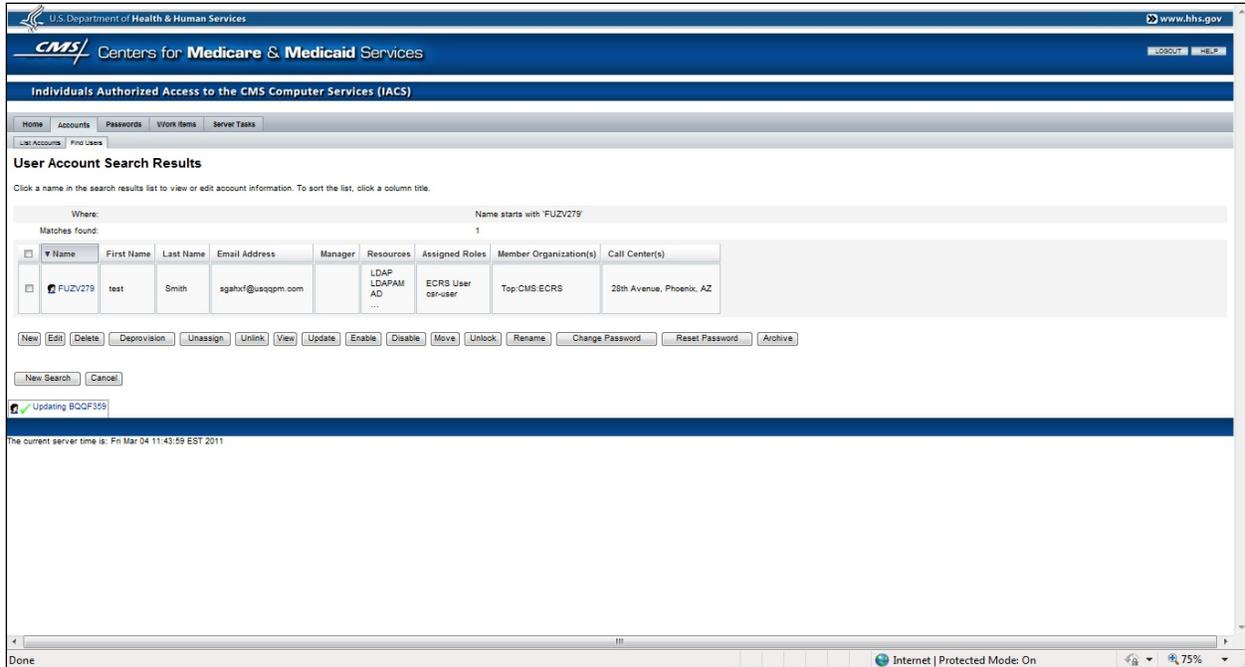


Figure 10: User Account Search Results Screen

4.1.2 Listing the User Accounts

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

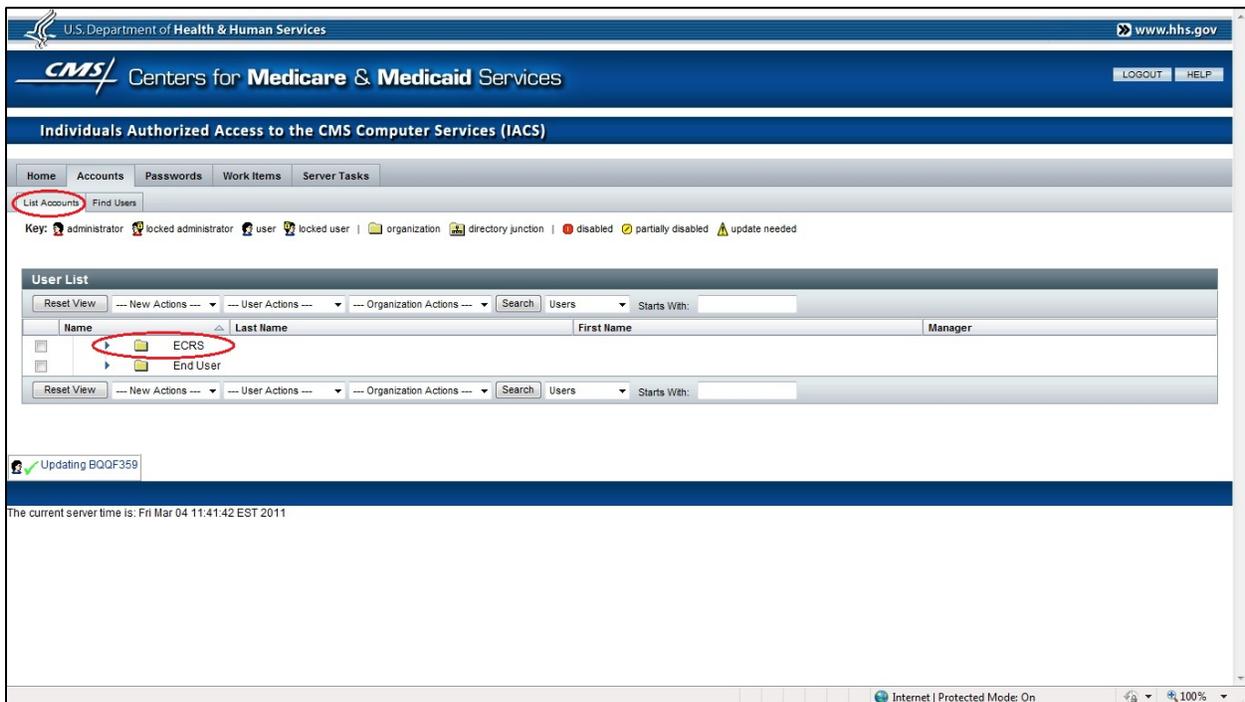


Figure 11: IACS Accounts – List Accounts Screen

Action: Select the *List Accounts* tab.

Action: Select the *Application* folder.

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

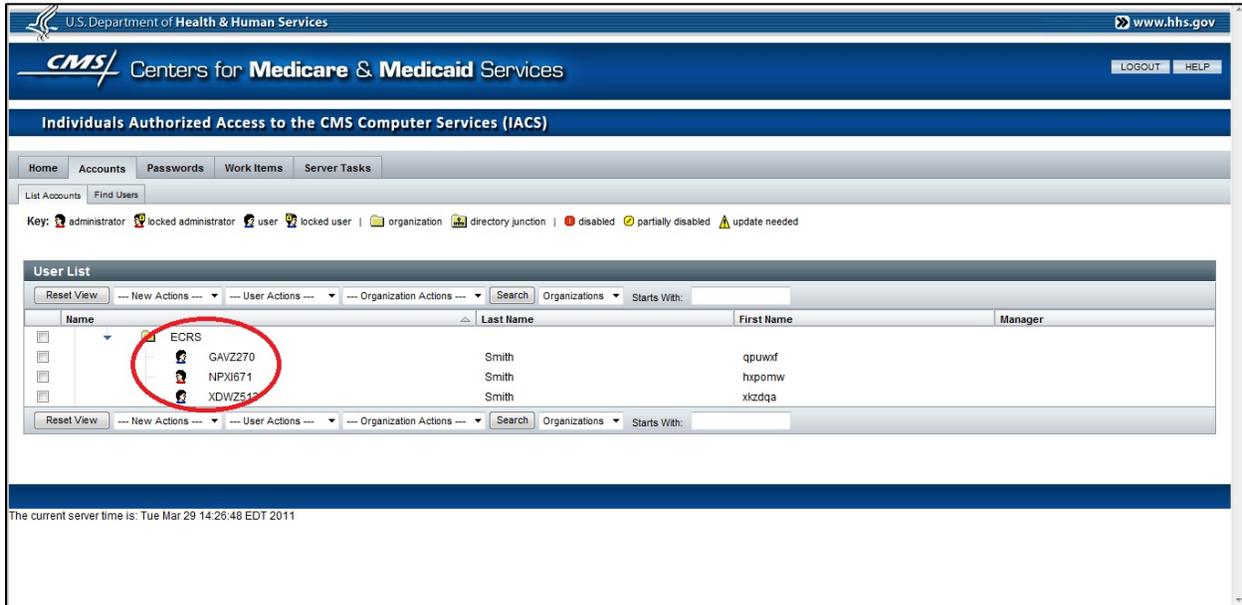


Figure 12: User List Screen

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 shown in Figure 11.

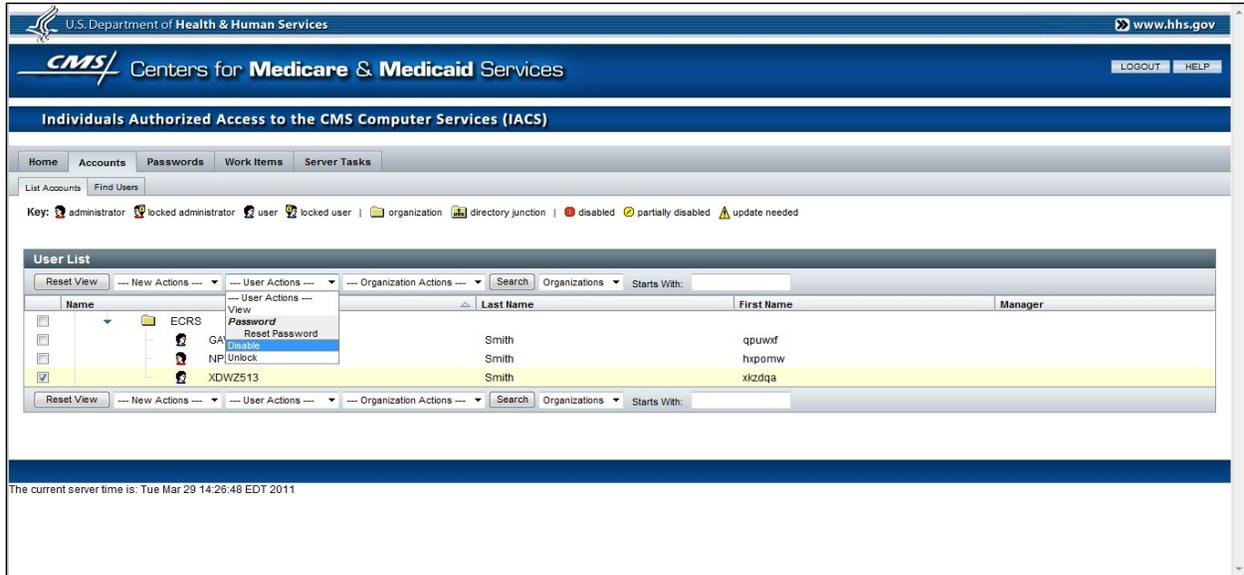


Figure 13: List Accounts: Disable

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

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

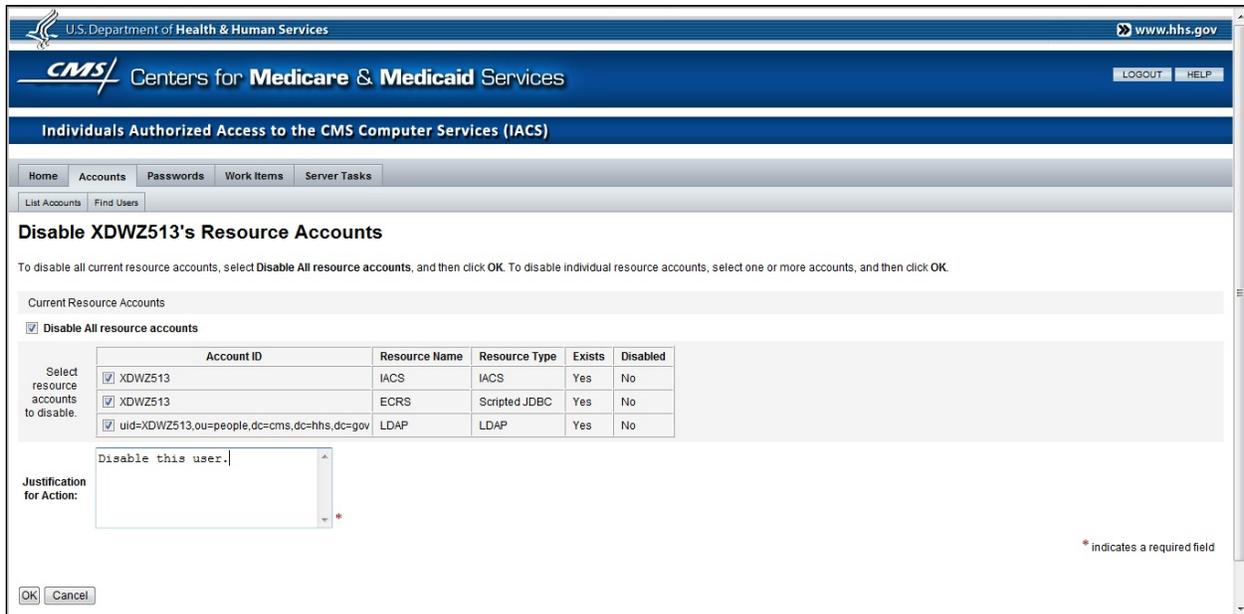


Figure 14: Disable User Resource Accounts

Action: Select the *check box* to the left of the **Disable All resource accounts** label at the top of the **Disable** <User ID Number 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 be 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 was successful.

Action: Select the **OK** navigation 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 Screen – List Accounts** will display a red icon to the left of the IACS User ID as illustrated in the Figure 15.

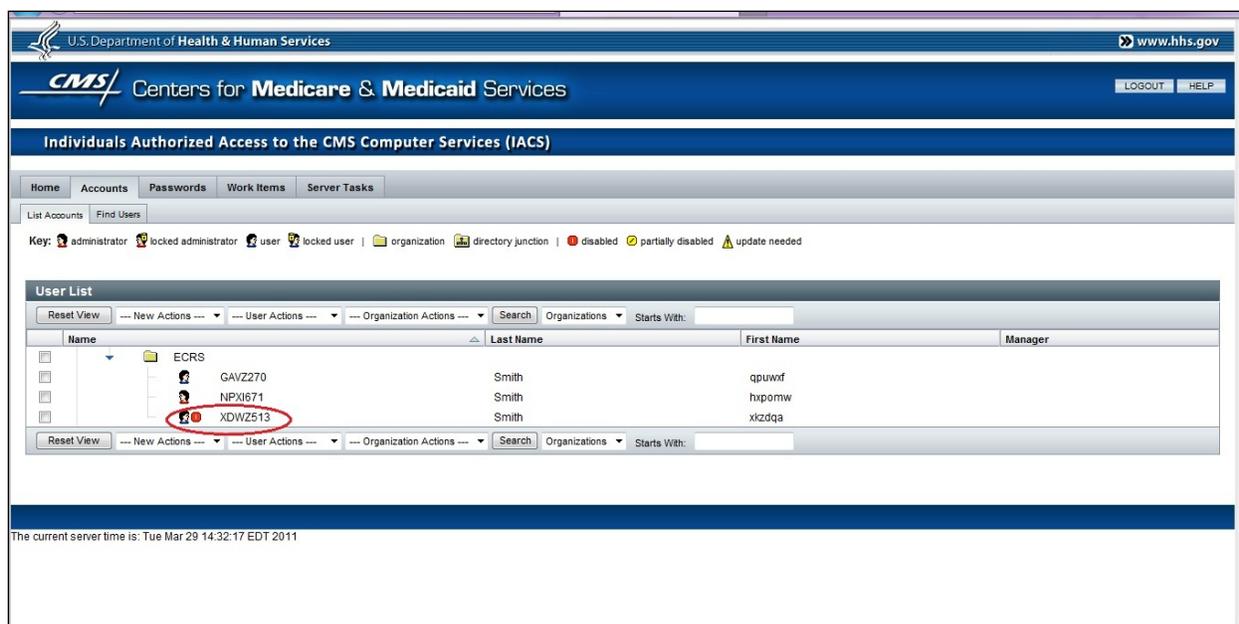


Figure 15: List Accounts: User Disabled

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.

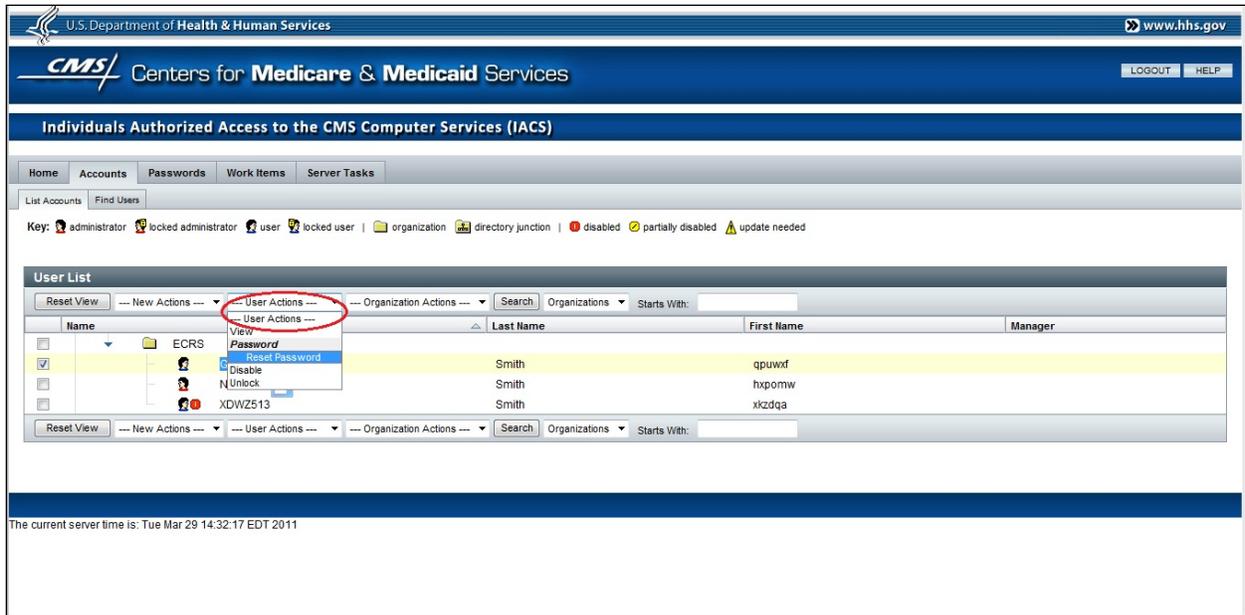


Figure 16: List Accounts - Reset Password

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

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

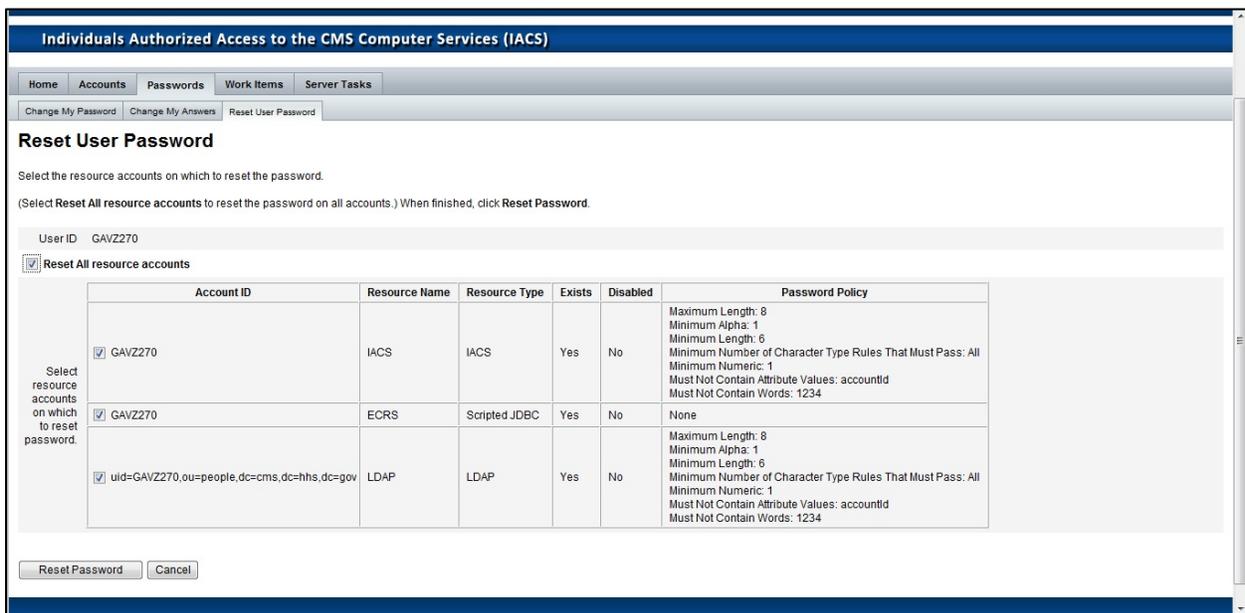


Figure 17: Reset User Password Screen

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 Disable User Account was successful.

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

Note: A new password will be sent to the user, via E-mail, once the password reset process completes.

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

4.1.5 Unlock User Accounts

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

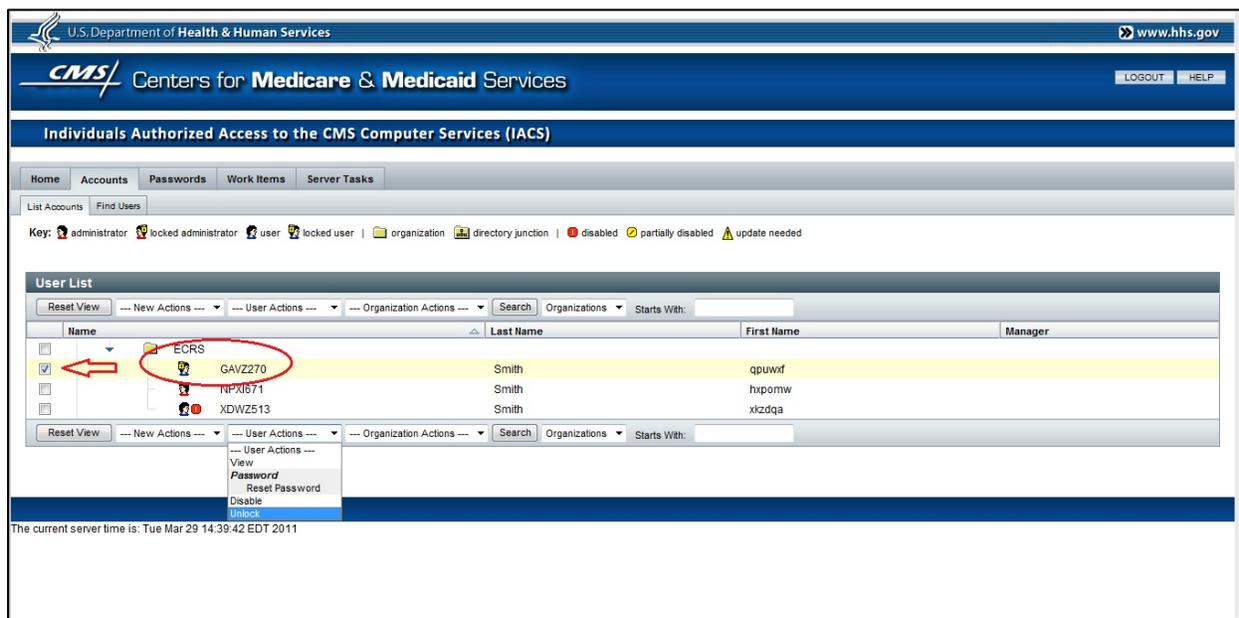


Figure 18: List Accounts - Unlock User Account

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 Number will appear here> **Resource Accounts** confirmation screen will display listing the account name and resources to be unlocked. This is illustrated in Figure 19.

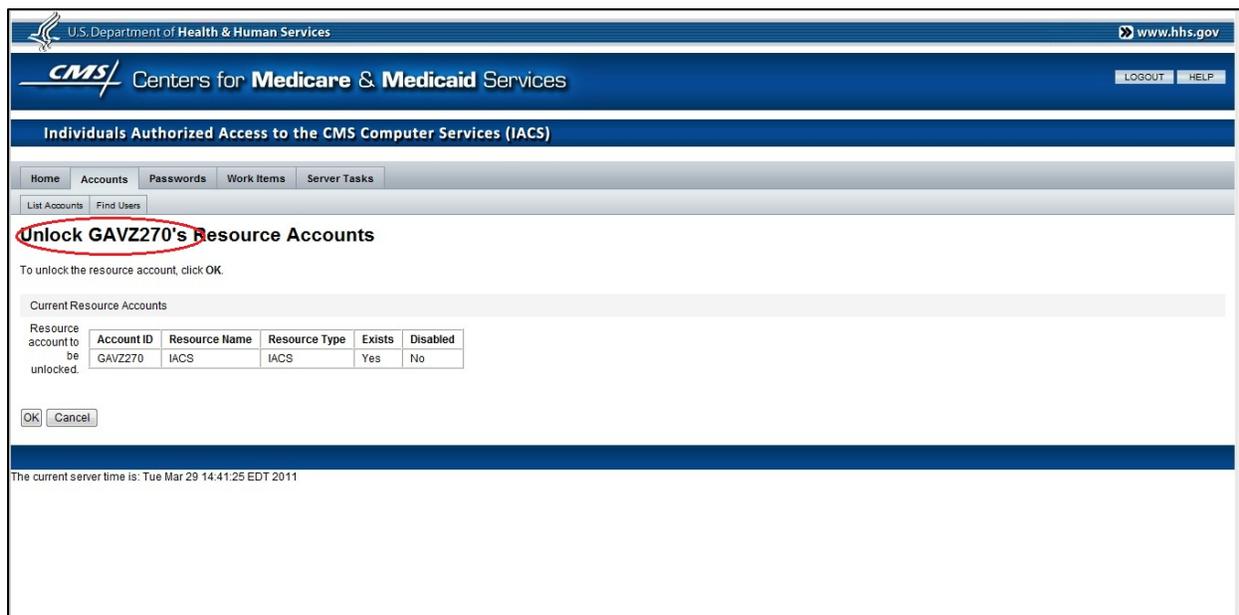


Figure 19: Unlock User Account – Unlock Confirmation Screen

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 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 Accounts – List Account** 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, the 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
- 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.

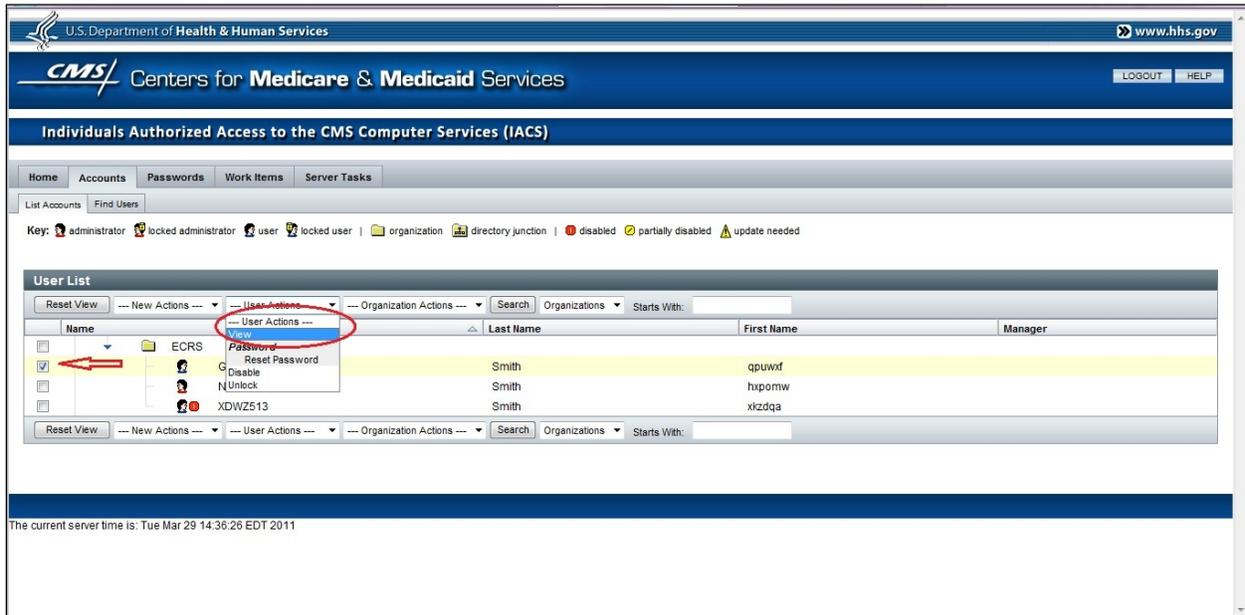


Figure 20: List Accounts - View User Account

The **View User** screen will display.

Action: Select the **Security** Tab.

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

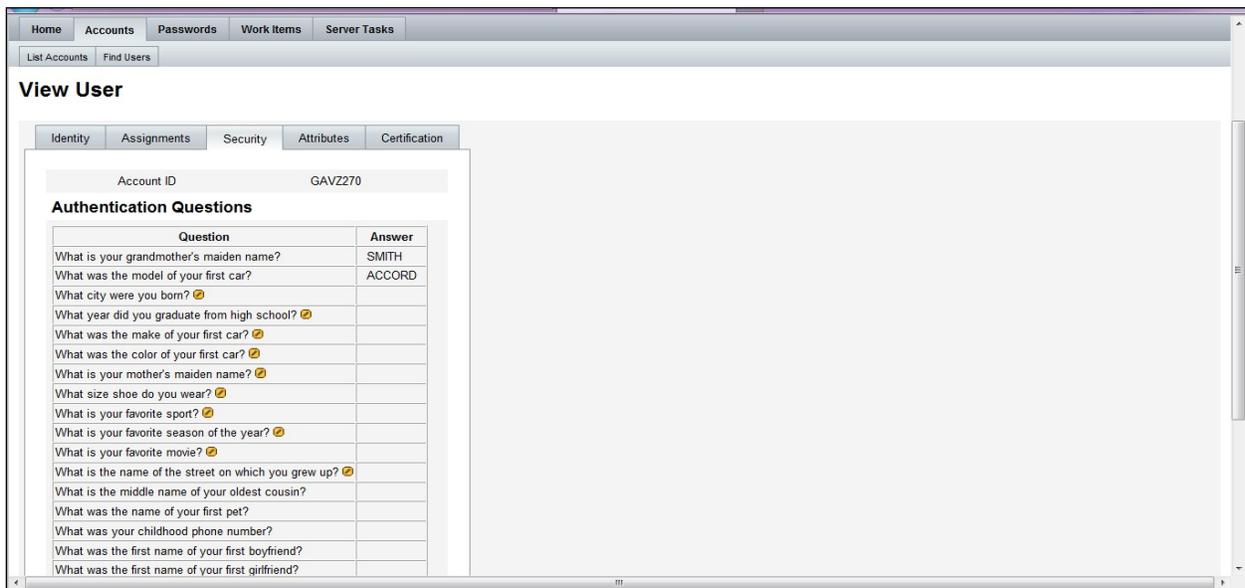


Figure 21: View User: User's Authentication Questions and Answers

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 be displayed in **Attributes** tab as illustrated in Figure 22.

The screenshot shows the 'View User' interface in the IACS system. At the top, there is a blue header with the CMS logo and 'Centers for Medicare & Medicaid Services'. Below this is a navigation bar with tabs for 'Home', 'Accounts', 'Passwords', 'Work Items', and 'Server Tasks'. The 'Accounts' tab is selected, and there are sub-tabs for 'List Accounts' and 'Find Users'. The main content area is titled 'View User' and has several sub-tabs: 'Identity', 'Assignments', 'Security', 'Attributes', and 'Certification'. The 'Attributes' tab is active, displaying a form with the following information:

- Account ID: GAV2270
- Last 5 Digits of SSN: 87604
- Date of Birth: 01/12/1970
- ECRS, LDAP** section:
 - middleInitial: [input field]
- LDAP** section:
 - callCenter: [input field]
 - cmsRoles: ecrs-approver
 - companyPhone: 800-333-9989X777
 - currentRacfid: [input field]

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

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

The screen will refresh and the user will be returned to the **IACS Accounts – List Account** 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.

4.1.7 Manage Users under their Authority

In IACS, Helpdesks can view the users under their scope of responsibility, using the Manage users under my authority function.

To use this help desk function, the Help Desk user must login to IACS using his IACS User ID and password. The **My Profile** screen will display after successful login as illustrated in Figure 6.

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

The **Manage users under my authority** screen with all the **Search Criteria** selection will be displayed as illustrated in Figure 23.

Action: Select the desired **Search Criteria** by entering the required data in the *User ID* field or selecting search criteria from the available drop-down lists.

Note: Help desk user can search users by **User ID(s), First Name, Last Name** and **Role**.

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

The screen will refresh and the Search Results will be displayed in a table under the **Search Criteria** area as illustrated in Figure 23.

Search Criteria

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

First Name: starts with

Last Name: starts with

Application: ECRS

Search for Archived Users ONLY

Role: ECRS User

Results per page: 10

Search Results (12 results)

Page 1 of 2

User Id	First Name	Last Name	Role
DGKV454	omtgmu	Smith	ECRS User
FIOK954	ggnolo	Smith	ECRS User
FUZV279	test	Smith	ECRS User
FZLV842	aialko	Smith	ECRS User
ITDG766	ECRSsubmitter	Smith	ECRS User
KTDI972	new	jersy	ECRS User
KUVI719	Ban	Smith	ECRS User
LUDZ010	MimiMASub	Smith	ECRS User

Figure 23: Manage users under my authority: Search Criteria

Application Helpdesks can view Archived Users of their corresponding application(s) using the **Manage users under my authority** function as follows:

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

Action: Select the desired **Search Criteria** by entering the required data in the User ID field or selecting search criteria from the available drop-down lists.

Note: Help desk user can search Archived users using **Email, 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 be displayed in a table under the **Search Criteria** area as illustrated in Figure 24.

The screenshot shows the 'Manage users under my authority' page in the IACS system. The search criteria section includes fields for User ID(s), First Name, Last Name, Application (set to ECRS), Search for Archived Users ONLY (checked), Email, Archived Date, Role (set to ECRS User), and Results per page (set to 10). The search results table displays two archived users:

User Id	First Name	Last Name	Role	Email	Archival Status	Archived Date	Archival Justification
XLDV708	ojwnnz	Smith	ECRS User	hiiny@iwsrpy.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 24: Manage users under my authority: Search for Archived Users ONLY

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.
- 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.

4.2 Approve Users

The standard within IACS is that the Help Desks are at the top of the chain of trust and function as Authorizers of Users with Approver roles. The Help Desks of the Applications listed below in Table 2 follow this standard and approve the new users' registration, profile modification and annual certification requests of the users under their approval authority. For more details on the process of Approving New User requests, Modify Profile requests and Annual Certification requests, the **IACS User Guide for Approvers** should be reviewed.

Application	Help Desk Role	Help Desk
CSP - HSTP	HSTP Help Desk User	HSTP Help Desk
CSP - MCSIS	MCSIS Help Desk User	MCSIS Help Desk
ECRS	ECRS HelpDesk	E CRS Help Desk
GENTRAN	Gentran Helpdesk	IACS Administration
HETS UI	MEIC Helpdesk	MCARE Help Desk
HPG	MEIC Helpdesk	MCARE Help Desk
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	E US Help Desk

Table 2: Applications and the corresponding Helpdesks with Approval Authority

4.3 Exceptions to Help Desk Functions

4.3.1 Exceptions for CBIC Tier-1 Help Desk

- **Approve Users**

The CBIC Tier-1 Help Desk cannot approve the users under their scope of responsibility.

4.3.2 Exceptions for CBIC Tier-2 Help Desk

- **Approve Users**

The CBIC Tier-2 Help Desk cannot approve the users under their scope of responsibility.

- **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 profile, 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 the PTANs of the AO, in which case the promotion will proceed. The original AO is disassociated from all of his/her 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 the PTANs of the AO and an appropriate error message will be displayed.

4.3.3 Exceptions for IUI Help Desk

- **Approve Users**
The IUI Help Desk cannot approve the users under their scope of responsibility.

4.3.4 Exceptions for MAPD Help Desk

- **Approve Users**
The MAPD Help Desk cannot approve the users under their scope of responsibility.

4.3.5 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 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.

4.3.6 Exceptions for LSA

- **Approve Users**
The LSA cannot approve the users under their scope of responsibility.

4.3.7 Exceptions for COB Help Desk

- **Approve Users**
The COB Help Desk cannot approve the users under their scope of responsibility.

4.3.8 Exceptions for PQRI Helpdesk

- **Approver**

The PQRI Helpdesk has the capability to approve pending requests for the applications he supports using the IACS Administrative console.

4.3.9 Exceptions for MEIC 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 Organization from IACS Administrative console.

5.0 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).
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.

Term	Definition
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.
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.
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 userID. 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 userID.

6.0 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
CHIP	Children's Health Insurance Program
CMS	The Centers for Medicare & Medicaid Services

Acronym	Definition
COB	Coordination of Benefits
CSP	Center for Strategic Planning
DBidS	Durable Medical Equipment, Prosthetics, Orthotics and Supplies (DMEPOS) Bidding System
DMEPOS	Durable Medical Equipment, Prosthetics, Orthotics & Supplies
ECRS	Electronic Correspondence Referral System
EUS	External User Services
GEN	Gentran Application
HIPAA	Health Insurance Portability and Accountability Act
HSTP	Health System Tracking Project
IACS	Individuals Authorized Access to the CMS Computer Services
ID	Identification
LSA	Local Service Administrator
MCARE	Medicare Customer Assistance Regarding Eligibility
MCSIS	Medicaid and Children's Health Insurance Program (CHIP) State Information Sharing System
MDR	Medicare Drug Rebate
MED	Medicare Exclusion Database
MEIC	The Medicare Eligibility Integration Contractor
NIST	National Institute of Standards and Technology
PQRI	Physician Quality Reporting Initiative
PQRS/eRX	Physician Quality Reporting System and E-Prescribing Incentive Programs
PS&R/STAR	Provider Statistical and Reimbursement /System Tracking for Audit and Reimbursement
PTAN	Provider Transaction Access Number
QNet	Quality Net