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

## User Guide for CMS Communities

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**November 2010**

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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 document establishes the procedures for registering and provisioning end-users and approvers of the following CMS User Communities:

- **Provider/Supplier Community**
- **Fiscal Intermediary (FI) / Carrier / Medicare Administrative Contractor (MAC) Community**
- **CMS Contractor Community**
- **Demonstrations Community**

## 2.0 Referenced Documents

This **IACS User Guide for CMS User Communities** 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 ([www.cms.hhs.gov/IACS](http://www.cms.hhs.gov/IACS)) 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 registration and account maintenance information for IACS Approvers.
- **IACS Helpdesk User Guide** – provides registration and account maintenance information for the Competitive Bid Implementation Contractor (CBIC) Helpdesk staff.

### 3.0 Overview

The sensitivity of CMS data and improved ability to access data, combine to create substantial risk to CMS and Beneficiaries. Legislations like the Health Insurance Portability and Accountability Act (HIPAA), Federal Standards published by National Institute of Standards and Technology (NIST), and CMS policies have been established to control that risk. IACS is the application the 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 distribution of User IDs and passwords, and authorize access to CMS web-based applications.

The **IACS User Guide for CMS User Communities** provides procedural information and representative screens that are common to most users and includes:

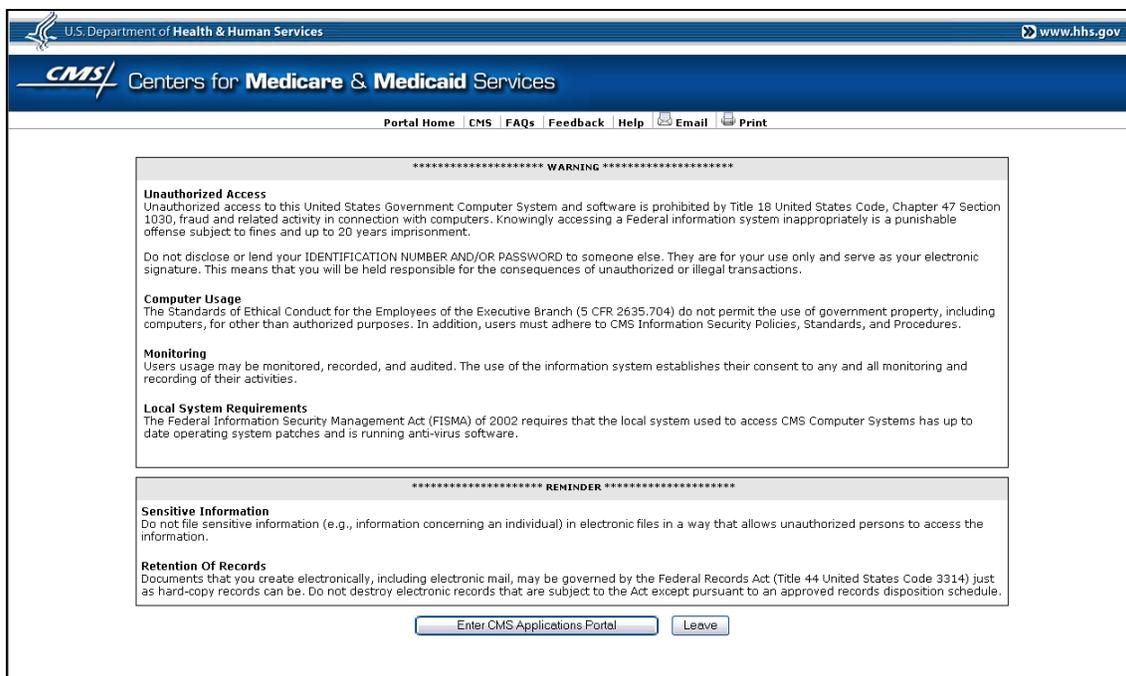
- Registering as a New User in one of CMS' User Communities
- Requesting access to User Community applications integrated with IACS
- Requesting access to CMS Applications integrated with IACS
- Modifying user registration information after the initial registration has been approved
- Modifying IACS account profile information such as adding or removing roles, Groups, Organizations, additional User Communities, and/or applications.

Procedural information that is particular to specific user communities is noted for reference. IACS procedures are consistently user-friendly and on-screen help and error messages will help guide users when completing procedures not illustrated in this User Guide. This user guide is designed primarily for the following users:

- **Provider/Supplier Community** – the community for physicians, non-physician practitioners, institutional providers and suppliers, or representatives of one of those entities.
- **Fiscal Intermediary (FI) / Carrier / Medicare Administrative Contractor (MAC) Community** – the community for those users employed directly or indirectly by a Fiscal Intermediary (FI), Carrier, or Medicare Administrative Contractor (MAC).
- **Demonstrations Community** – the community for users engaged on CMS demonstration projects.

#### 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 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 them to be authorized 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**

First 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 in different User Communities. 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

Wherever possible, 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 bring 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. Input fields are indicated in *plain italics*.

Example:

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

7. Required input fields are indicated by an asterisk to the right of the field. These fields must be completed.
8. If the user needs help on completing an input field, some fields have help icons (*i*) to their left. This icon is displayed as a graphic: a small blue letter *i* within a white box.

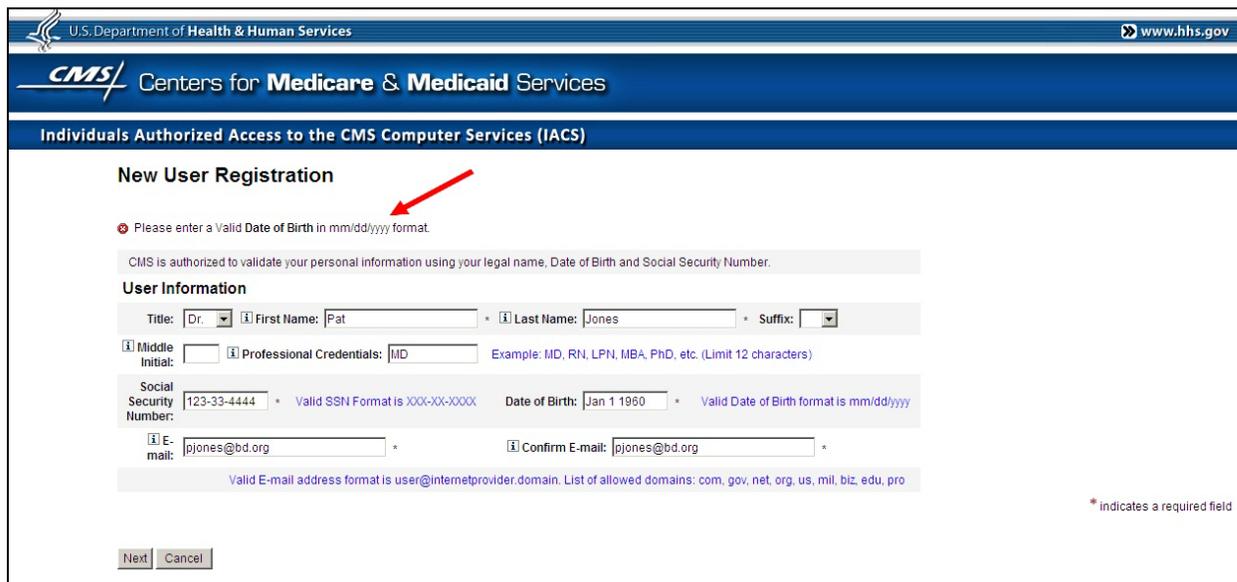
Examples of specific screens are used in this User Guide to illustrate what users would see during common registration and account modification procedures. The names and/or data on these screens are meant to be representative and not to reflect actual IACS Users and/or Accounts.

### 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 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' page for the U.S. Department of Health & Human Services, Centers for Medicare & Medicaid Services. The page title is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. A red arrow points to a warning message: 'Please enter a Valid Date of Birth in mm/dd/yyyy format.' Below this, the 'User Information' section contains several fields: Title (Dr.), First Name (Pat), Last Name (Jones), Suffix, Middle Initial, Professional Credentials (MD), Social Security Number (123-33-4444), Date of Birth (Jan 1 1960), and E-mail (pjones@bd.org). A legend at the bottom right indicates that an asterisk (\*) denotes a required field.

**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.

Figure 4: Information Message

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

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 Getting Started – New User Registration

To optimize access to the IACS screens, the user needs to ensure that the following criteria are met:

1. **Screen Resolution:** CMS screens are designed to be best viewed at a screen resolution of 800 x 600.
2. **Internet Browser:** Internet Explorer, version 6.0 or higher is used.
3. **Plug Ins:** The user should verify that the latest version of JAVA and ActiveX is installed on his PC.
4. **Pop-up Blockers:** Disable pop-up blockers prior to attempting to access the CMS Applications Portal.

The user should contact the Helpdesk if he has questions about any of the criteria. For Helpdesk contact information, see Section 9.2.

### 4.1 Available Roles

Many roles are common to more than one community. Roles will be defined the first time they occur and afterwards listed by role name only.

#### Provider/Supplier User Community:

- **Security Official (SO)** – The Security Official is the authorized representative of his/her Organization and registers the Organization in IACS.
  - There can be only one Security Official in an Organization.
  - The Security Official is trusted to approve the access requests of Backup Security Officials.
  - The Security Official can approve the access requests of User Group Administrators (UGA).
  - The Security Official can approve the creation of Surrogate User Groups.
  - The Security Official is the only individual who can update the information in the Organization profile in IACS.
- **Backup Security Official (BSO)** – A Backup Security Official performs many of the same functions as a Security Official (see below) in an Organization.
  - There can be one or more Backup Security Officials in an Organization.
  - The Backup Security Official can approve the access requests of User Group Administrators and may assist the Organization's Security Official with other administrative tasks.

- **User Group Administrator (UGA)** – The person who registers with IACS as a User Group Administrator.
  - This person also registers the User Group within an Organization.
  - This person is trusted to approve the access requests of End Users for that User Group.
  - This person also has the ability to update User Group profile information.
- **End User** – An End User is a staff member who is trusted to perform Medicare business for the Organization.
  - An End User is part of a User Group within the Organization.

#### **FI/Carrier/MAC User Community:**

- **Security Official**
- **Backup Security Official**
- **User Group Administrator**
- **End User**

**Note:** Refer to the corresponding role description provided under Provider Supplier Community.

#### **Demonstrations Community:**

- **Electronic Health Record Demonstration (EHRD) User**
  - An EHRD user is anyone who wishes to participate in the EHRD demonstration.

## **4.2 Basic Registration Steps**

The following Section provides instructions for the most common registration steps using the Security Official in the Provider Supplier Community as an example. Registration steps for the other communities are not significantly different from those provided in this document. Noteworthy differences for other roles will be identified in Section 4.3.

Prior to registering in IACS, the user should have received information on registration details from his Organization or CMS contact. This information may include:

- The role the user will register for in IACS.

- Additional information during registration such as Organization Legal Name, Taxpayer Identification Number, street address, etc.

**Note:** If the user has not received information on registering for IACS, the user needs to check with his Organization prior to registering for IACS to get this information.

To register in IACS the user must first access the CMS website.

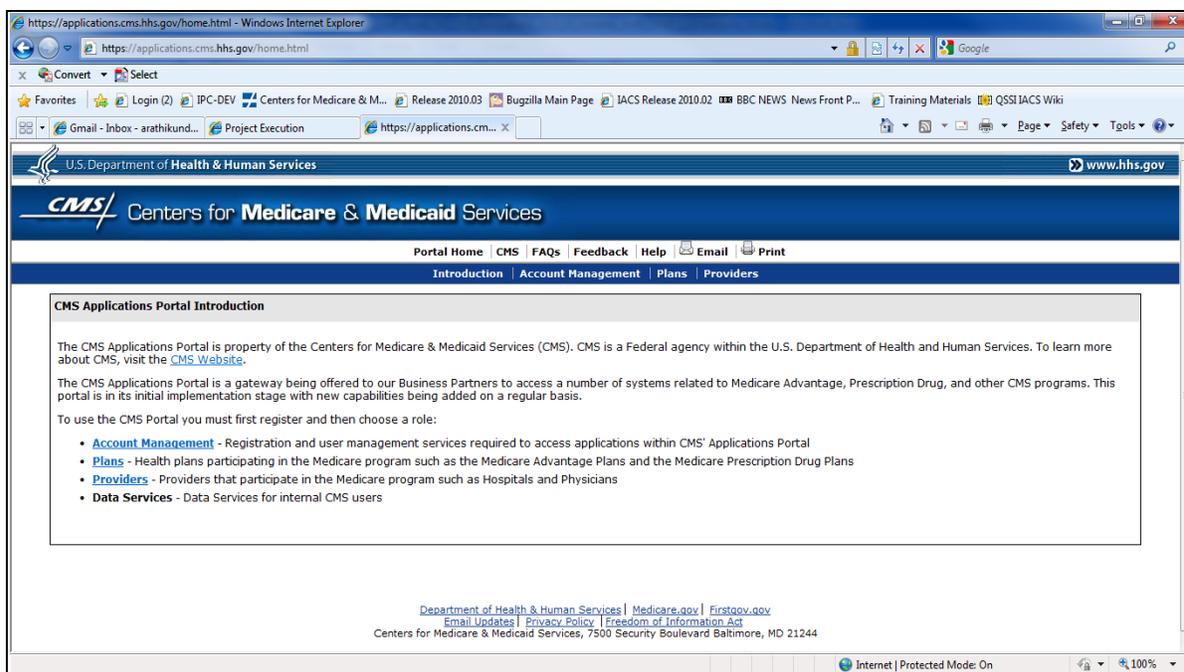
**Action:** Navigate to <https://applications.cms.hhs.gov> on the CMS website.

The **CMS Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure 1.

If the user does not want to proceed any further and wishes to exit, he must select the **Leave** button.

The user must read the important information on this screen and indicate his agreement by selecting the **Enter CMS Applications Portal** button.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure 6.



**Figure 6: CMS Applications Portal Introduction Screen**

**Action:** Select the [Account Management](#) hyperlink in either the white space in the center of the screen or the menu bar toward the top of the screen.

The **Account Management** screen will display as illustrated in Figure 7.

Hyperlinks on this screen will allow users to access IACS registration, login functions, and the IACS Community Administration Interface.

The bottom area of the screen provides Help Resources with Helpdesk contact information and E-mail hyperlinks.

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

**CMS** Centers for Medicare & Medicaid Services

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

Introduction | Account Management | Plans | Providers

#### Account Management

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

- [New User Registration](#) - Apply for a CMS computer services account
- [My Profile](#) - Manage your CMS computer services account
- [Forgot Your User ID?](#)
- [IACS Community Administration Interface](#) - For assisted user accounts management functions

#### Help Resources

- Provider Community users should direct questions or concerns to the External User Services (EUS) Help Desk at 1-866-484-8049, TTY/TDD at 1-866-523-4759 (Monday - Friday 7am-7pm EST) or via email at [EUSSupport@cgi.com](mailto:EUSSupport@cgi.com)
- Medicare providers participating in the HETS UI pilot should direct questions to the MCARE help desk at 1-866-440-3805 (phone), 1-615-238-0822 (fax) or via email [mcare@cms.hhs.gov](mailto:mcare@cms.hhs.gov)
- Participants in the Post Acute Care Payment Reform Demonstration may direct questions and concerns related to the CARE application and the PAC-PRD demonstration to the RTI helpdesk by emailing [help@pacdemo.rti.org](mailto:help@pacdemo.rti.org) or by calling 1-866-412-1510.
- Health Plans should direct questions or concerns to MMAHelp desk at 1-800-927-8069 or via email at [mmahelp@cms.hhs.gov](mailto:mmahelp@cms.hhs.gov)
- Suppliers for the Competitive Bidding Program should direct questions or concerns to the Competitive Bidding Implementation Contractor at 1-877-577-5331 (Phone) or via e-mail [CBIC\\_admin@palmettogba.com](mailto:CBIC_admin@palmettogba.com)
- Participants in the Quality Improvement Organizations' 9th Scope of Work Care Transitions Theme may direct questions and concerns related to the CARE application and the QIO to the Quality Improvement Organization Support Contractor (QIOSC) helpdesk by calling 1-800-676-0724 or emailing [helpqiocare@cfmc.org](mailto:helpqiocare@cfmc.org)

#### Important Messages

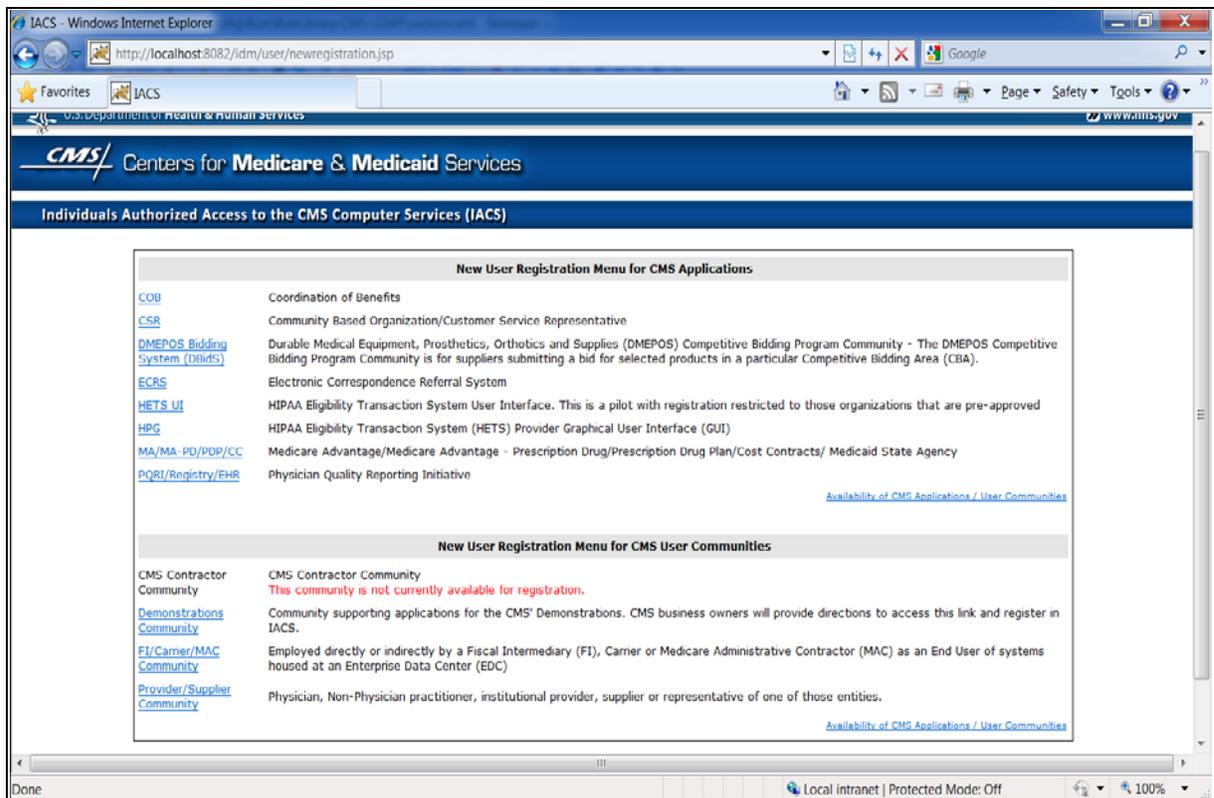
If you are requesting the IACS Security Official (SO) role, please note, that your request will expire if the required IRS documentation is not submitted within 60 days of your request. Allow time for processing and if you know that your request will expire, please contact EUS before the 60 day deadline.

**Do not disclose or lend your User ID AND/OR PASSWORD to someone else.** They are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions. Sharing of accounts may lead to termination of system access privileges and /or adverse action up to and including legal prosecution.

**Figure 7: Account Management Screen**

**Action:** Select the [New User Registration](#) hyperlink.

The **New User Registration Menu** screen will display as illustrated in Figure 8.



**Figure 8: New User Registration Menu Screen**

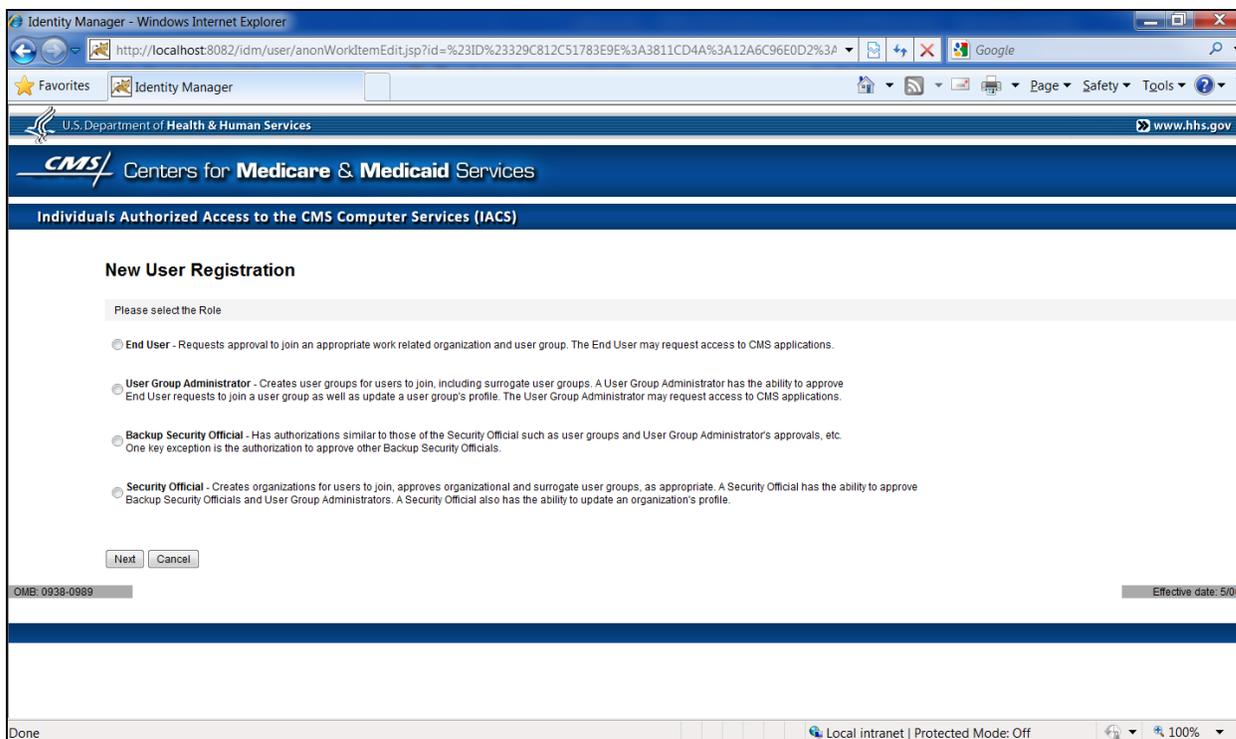
**Action:** From the **New User Registration Menu** screen as illustrated in Figure 8, select the [Provider/Supplier Community](#) hyperlink. Users belonging to other communities would select the appropriate community.

The CMS Computer Systems Security Requirements **Terms and Conditions** screen will display.

This screen contains the *Privacy Act Statement* and the *Rules of Behavior* which presents the terms and conditions for accessing CMS computer systems as illustrated in Figure 2.

**Action:** Accept the terms and conditions to be authorized to access CMS systems and applications; and select the **I Accept** button.

The **New User Registration** screen will display, as illustrated in Figure 9 for the Provider/Supplier Community. This screen allows the user to select his desired role.



**Figure 9: New User Registration - Role Selection Screen**

**Action:** For this example, select the **Security Official** radio button.

**Note:** If the user is registering for a different community, the screen will display roles respective to that community.

**Action:** Select the **Next** button.

After the user selects the **Next** button, the system will display a **New User Registration** screen with a **User Information** section requiring his input. This screen is illustrated in Figure 10.

**Note:** The Provider/Supplier Community will be used to illustrate common registration procedures and screens that apply to the majority CMS User Communities. There are some minor differences in the information collected by IACS for the different User Communities. These differences will be noted.

The screenshot shows the 'New User Registration' screen for IACS. At the top, there is a header for the U.S. Department of Health & Human Services and the CMS logo. Below this is a navigation bar with the text 'Centers for Medicare & Medicaid Services'. The main heading is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The section is titled 'New User Registration'. 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' (text, required), 'Last Name' (text, required), 'Suffix' (dropdown), 'Middle Initial' (text), 'Professional Credentials' (text, with an example: 'MD, RN, LPN, MBA, PhD, etc. (Limit 12 characters)'), 'Social Security Number' (text, required, with a note: 'Valid SSN Format is XXX-XX-XXXX'), 'Date of Birth' (text, required, with a note: 'Valid Date of Birth format is mm/dd/yyyy'), 'E-mail' (text, required), and 'Confirm E-mail' (text, required). A note below the email fields states: 'Valid E-mail address format is user@internetprovider.domain. List of allowed domains: com, gov, net, org, us, mil, biz, edu, pro'. A legend indicates that an asterisk (\*) denotes a required field. At the bottom left are 'Next' and 'Cancel' buttons. At the bottom right, there is a footer with 'OMB: 0938-0989' and 'Effective date: 5/06'.

**Figure 10: New User Registration Screen: User Information Area**

**Action:** Complete the required fields in the **User Information** area of the screen. The optional fields may be completed as well.

- The First and Last Name must be those on file with the Social Security Administration (SSA).
- The Social Security Number (SSN) must be the one on file with the Social Security Administration.
- The Date of Birth (DOB) must be the one on file with the Social Security Administration.
- A unique, work related E-mail address where the user may be contacted is required.
- The E-mail address should be entered a second time for verification. Values should not be cut and pasted from one field to the other.

**Note:** The information must be entered in the fields in the formats specified on the screen.

**Action:** Select the **Next** button when all the required fields have been completed.

When the **Next** button is selected, the system validates the data that has been entered.

- The name, SSN, and DOB are validated against data on file at the Social Security Administration.
- Additionally, the system verifies that the SSN entered does not already exist for another IACS account.

- The E-mail address is validated to verify that it does not already exist for another IACS account.

**Note:** SSA validation service maintenance windows typically occur during the following times: 1 AM to 5 AM(EST) Sundays thru Fridays, and Saturdays from 11 PM to Sundays 5 AM (EST). Users may not be able to register for the applications in this guide during the maintenance windows.

If the **Cancel** button is selected, the request is cancelled and all the information that was entered will be lost. A screen indicating this will be displayed. The user must select the **OK** button to confirm the action, exit that screen and close the browser window.

If the User Information data is successfully validated, the **E-mail Address Verification** screen will display as illustrated in Figure 11.

**Figure 11: E-mail Address Verification Screen**

The user will be sent an E-mail confirming that IACS has received the user's request and providing him with a Verification Code. The user must enter the *Verification Code* on the **E-mail Address Verification** screen.

**Action:** Leave the **E-mail Address Verification** screen open.

**Note:** The user will have 30 minutes to complete this step of the registration process. If the user does not complete this step in 30 minutes or if the user closes the E-mail Address Verification screen, his request will be cancelled and all the information that he has entered will be lost.

**Action:** Proceed to the E-mail Inbox and open the message with the verification code. The E-mail subject line will be: **E-mail Address Verification**. The verification code must be written down.

If the user does not receive the verification E-mail, the user may select the [Re-send Verification Code](#) hyperlink to the right of the *Verification Code* field on the **E-mail Address Verification** screen. He may ask to have it resent up to three times. The user may contact the Helpdesk if he needs assistance or does not receive the E-mail Address Verification E-mail.

If the **Cancel** button is selected, the application request will be cancelled and all the information that was entered will be lost. A screen indicating this will be displayed. The user must select the OK button to confirm the action, exit that screen, and close the browser window. In this case, the system will then return him to the **CMS Applications Portal Introduction** screen illustrated in Figure 6.

Once the user has his verification code, the user must return to the **E-mail Address Verification** screen.

**Action:** Enter the **Verification Code** in the *Verification Code* field on the **E-mail Address Verification** screen as illustrated in Figure 11.

**Note:** The code must be entered exactly as it is displayed in the E-mail message without any extra spaces or characters.

**Action:** Select the **Next** button should be selected.

**Note:** After three unsuccessful attempts to enter the verification code, the IACS registration request will be cancelled.

When the user enters the correct verification code and selects the **Next** button on the **E-mail Address Verification** screen, the screen will refresh and the **New User Registration** screen will display as illustrated in Figure 12. This screen has additional sections that need to be completed.

The top area of the **New User Registration** screen, illustrated in Figure 12, will be pre-populated with the *User Information* fields that the user completed prior to his E-mail address verification. This data cannot be changed.

The center of the screen contains an area labeled **Professional Contact Information**. In this area of the screen the user is required to enter his professional contact information.

The screenshot shows the 'New User Registration' screen for the IACS system. The page header includes the U.S. Department of Health & Human Services logo and the CMS logo. The main title is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The section is titled 'New User Registration' and contains a sub-section for 'Professional Contact Information'. The form includes the following fields and values:

- User Information:**
  - Title: Dr. (dropdown)
  - First Name: Pat \*
  - Last Name: Smith \*
  - Suffix: Jr. (dropdown)
  - Middle Initial: (empty)
  - Professional Credentials: MD (Example: MD, RN, LPN, MBA, PhD, etc. (Limit 12 characters))
  - Social Security Number: 739-20-0000 \* (Valid SSN Format is XXX-XX-XXXX)
  - Date of Birth: 10/12/2009 \* (Valid Date of Birth format is mm/dd/yyyy)
  - E-mail: sumedw@agvkrz.com \*
  - Confirm E-mail: sumedw@agvkrz.com \*
- Professional Contact Information:**
  - Office Telephone: 739-120-0000 \* (Valid Telephone Number Format is XXX-XXX-XXXX)
  - Ext: (empty)
  - Company Name: BGI Medical Center
  - Company Telephone: (empty)
  - Ext: (empty)
  - Country: United States
  - Address 1: 1 Windy Circle \*
  - Address 2: (empty)
  - City: Baltimore \*
  - State/Territory: MD \*
  - Zip Code: 21209 \* - (empty)
  - EDC Assigned User ID: (empty)
- Access Request:**
  - Community Type: Provider/Supplier

**Figure 12: New User Registration Screen: Professional Contact Information Area**

**Action:** Enter the professional contact information in the fields provided in the **Professional Contact Information** area of the **New User Registration** screen.

All required fields must be completed. Required fields are indicated by an asterisk (\*) to the right of the field.

**Note:** The *Country* input field is prepopulated with the United States and cannot be modified.

Beneath the **Professional Contact Information** area of the **New User Registration** screen, an **Access Request** area will display. This area contains information and input fields that are specific to the different roles in the CMS User Communities.

**Note:** The next step of the Security Official is to create an Organization. Creating an organization does not apply to any other Provider Community role.

**Note:** Input fields for other Provider Community roles may vary from those shown for the Security Official.

**Access Request**

Community Type: **Provider/Supplier**

Role: Security Official

**Organization Information**

TIN / SSN:  \*  CMS Certification Number:

Legal Business Name:  \* The Legal Business Name as specified in the IRS (Internal Revenue Service) CP575 Form

Please select if the Organization's Address and Telephone Number Information is same as the User's Address and Telephone Number

Company Telephone:  \* Ext:  Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax:  Ext:  Valid Fax Number Format is XXX-XXX-XXXX

Country:  United States

Address 1:  \*  Address 2:

City:  \* State/Territory:  \* Zip Code:  \* -

Expected Organization Size:  \*

Justification for Action:

\* indicates a required field

Next Cancel

**Figure 13: New User Registration Screen: Security Official, Organization Information Area**

All required information must be provided. Required fields are indicated by an asterisk (\*) to the right of the field. Providing optional information will help to further define the user's Organization.

**Action:** Enter the Organization's **Taxpayer Identification Number** (TIN) in the **TIN/SSN** field. If a **Social Security Number** (SSN) is used for taxpayer reporting purposes, then enter the SSN in the TIN/SSN field. The TIN or SSN must be the one associated with the Legal Business Name specified on the Internal Revenue Service/IRS Form CP575.

**Action:** Enter the **CMS Certification Number** (CCN) in the CMS Certification Number field.

**Note:** The CCN was previously known as the OSCAR Number and pertains to Medicare Part A Institutional Providers. This number must be entered if the Organization has one.

**Action:** Enter the **Legal Business Name** of the Organization in the Legal Business Name field. The legal business name is the name specified on the IRS Form CP-575.

If the Organization's address and telephone number are the same as in the professional contact information section, take the following action:

**Action:** Select the checkbox next to the Legal Business Name field labeled "*Please select if the Organization's Address and Telephone Number Information is the same as the User's Address and Telephone Number*".

If the Organization's address and telephone number are not the same as in the professional contact information section, take the following action:

**Action:** Enter the remaining Organization Contact Information fields.

**Action:** Select the **Expected Organization Size** from the drop-down list in the *Expected Organization Size* field. This field refers to the number of expected users to register in IACS for the Organization.

When the user has completed providing the required *Organization Information* he must enter a justification statement indicating the reason he is requesting this action.

The **Next** button should be selected when done.

If the **Cancel** button is selected, the application request will be cancelled and all the information entered will be lost. A screen indicating this will be displayed. The user must select the OK button to confirm the action, exit that screen, and close the browser window. The system will then return to the **CMS Applications Portal Introduction** screen.

When the **Next** button is selected, the system will display the **Authentication Questions** screen as illustrated in Figure 14.

The user must answer a minimum of two authentication questions in order to complete his registration. These answers will be used to validate the user's identity should he attempt to recover his User ID or password using IACS' self-service "Forgot your User ID?" or "Forgot your password?" features.

### Authentication Questions

Please answer at least 2 of the following questions, and then select "Next" to proceed with registration.

Question	Answer
What is your grandmother's maiden name?	<input type="text"/>
What was the model of your first car?	<input type="text"/>
What is the middle name of your oldest cousin?	<input type="text"/>
What was the name of your first pet?	<input type="text"/>
What was your childhood phone number?	<input type="text"/>
What was the first name of your first boyfriend?	<input type="text"/>
What was the first name of your first girlfriend?	<input type="text"/>
What is the name of your first elementary school?	<input type="text"/>
What was your childhood street name?	<input type="text"/>
What was the name of your first employer?	<input type="text"/>
What was your grandfather's profession?	<input type="text"/>
What was the name of your first college roommate?	<input type="text"/>
Where was your wedding reception held?	<input type="text"/>

**Figure 14: Authentication Questions Screen**

**Action:** Answer at least two of the **Authentication Questions** listed.

**Action:** Select the **Next** button when done.

The system will display the **Review Registration Details** screen as illustrated in Figure 15. The User Guide information for this screen and Figure 16 needs to be reviewed to see how to complete the **New User Registration** process.

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

**CMS** Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

### Review Registration Details

The following is the information you entered on the New User Registration Form.  
Please review the information below to verify correctness.  
- To modify any of the information, click 'Edit'.  
- If the information is correct and you wish to proceed, click 'Submit'.

**First Name:** John      **Mi:** x      **Last Name:** Smith  
**Title:** Mr.      **Suffix:** Jr.      **Professional Credentials:**  
**Social Security Number:** \*\*\*\*\*0000  
**Date of Birth:** 09/16/2010  
**E-mail:** ncs0j@upkxa.com  
**Office Telephone:** 306-120-0000 X306

**Company Name:** Company 1      **Company Telephone:** 306-120-0000 X306  
**Country:** United States  
**Address 1:** Address 1      **Address 2:**  
**City:** Baltimore      **State/Territory:** AZ      **Zip Code:** 30580-3058

**User/Community Type:** Provider/Supplier  
**Role:** Security Official  
**Action:** Create Organization  
**Organization Type:** Provider Organization  
**TIN/SSN:** 30-3048113      **CMS Certification Number:** 304811  
**Legal Business Name:** Organization 1  
**Company Telephone:** 306-120-0000 X306      **Company Fax:** 304-304-3049 X3094  
**Country:** United States  
**Address 1:** Address 1      **Address 2:**  
**City:** Baltimore      **State/Territory:** AZ      **Zip Code:** 30580-3058  
**Expected Organization Size:** 10 & above users

**Authentication Questions**

Question	Answer
What was the name of your first pet?	Molu
What is the name of your first elementary school?	Holy Cross High School

OMB: 0938-0989      Effective date: 5/06

Done      Local intranet | Protected Mode: Off      100%

**Figure 15: Review Registration Details Screen**

**Action:** Review the information presented in the **Review Registration Details** screen.

The **Edit** button must be selected if there are any modifications that are to be made to the registration information. The **New User Registration** screens will be redisplayed with all the information populated in the appropriate fields. The user may modify the information that he wants and, when finished, he should select the **Next** button. He will again be presented with the **Review Registration Details** screen.

If he selects the **Cancel** button, the application request is cancelled and all the information he entered will be lost. A screen indicating this will be displayed. He must select the **OK**

button to exit that screen. The system will then return him to the **CMS Applications Portal Introduction** screen.

**Action:** Select the **Submit** button when satisfied that the registration information is correct. A **Registration Acknowledgement** screen will display as illustrated in the example in Figure 16.

The **Registration Acknowledgement** screen indicates the registration request has been successfully submitted and provides a tracking number for the request. This tracking number should be recorded and should be used if the user has questions about the status of his request.

**Note:** The information contained on the **Registration Acknowledgement** screen can be printed by selecting the **Print** icon.



**Figure 16: Registration Acknowledgement Screen**

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

The **Registration Acknowledgement** screen will close and the system will return to the **Account Management** screen.

**Note:** The registration will not be completed unless the **OK** button is selected.

After the IACS New User Registration is completed, an E-mail will be sent confirming that IACS has received the request and a Request Number will be provided. This request number should be used if the user needs to contact the Helpdesk regarding his request.

If the E-mail notification has not been received within 24 hours after the user registers, he will need to contact his Helpdesk. See Section 9.2 for Helpdesk contact information.

The user's Approver will be notified of his pending request via E-mail.

Once the user's Approver has approved his request and his account has been created, two separate E-mail messages will automatically be sent to him.

1. The first E-mail (**Subject: FYI: User Creation Completed – Account ID Enclosed**) will contain the IACS User ID.
2. The second E-mail (**Subject: FYI: User Creation Completed – Password Enclosed**) will contain the format of the initial password and instructions to change the initial password. The user will be required to change his initial password the first time he logs in.

If the user's request for registration is denied, the user will receive an E-mail informing him that his request has been denied. The E-mail will also provide the justification for the denial.

If the Approver has not processed the registration request within 12 or 24 calendar days (depending on the role) of submission, the request will be cancelled automatically and the user will receive an E-mail notification to this effect. He will then have to go to the **New User Registration** screen, re-enter the information, and resubmit his registration request.

### 4.3 *Exceptions to Basic Registration*

#### 4.3.1 **Exceptions to Provider / Supplier Community Registration**

- A user who is registering as a Backup Security Official / User Group Administrator / End User has to select from an existing list of Organizations.
- A user who is registering as User Group Administrator or End User can create a new user group or associate with an existing user group. Refer to section 4.4 for creating or associate to a user group.

#### 4.3.2 **Exceptions to FI / Carrier / MAC Community Registration**

- All users registering into the FI Carrier MAC Community has to select from an existing list of Organizations.
- A user who is registering as a User Group Administrator or End User can create a new user group or associate with an existing user group. Refer to section 4.4 for creating or associating with a user group.

### 4.4 *Creation of User Groups*

The following are the actions that can be taken to create or associate a user group:

- **Create a Provider or Surrogate User Group** –This action should be selected if the user wants to create a Provider User Group.
  - A Provider User Group is an entity within an Organization. An example of a Provider User Group would be a physical therapy group in a hospital.
  - A Surrogate User Group is a group that is working on behalf of an existing Organization. An example of a Surrogate User Group would be a billing agency that works on behalf of a medical association may be a Surrogate Group within a hospital Organization.

The creation of Provider User Group is explained below as an example.

The user who is creating the user group has to enter the information under the Organization Search and Provider User Group information as shown in Figure 17.

**Access Request**

Community Type: [Provider/Supplier](#)

**i** Role: User Group Administrator

**i** Action:  Create a Provider User Group  Create a Surrogate User Group  Associate to an Existing User Group

---

**i** **Organization Search**

Search for the Organization you want to associate with. Specify as many parameters below as possible, and then click 'Search' to select the Organization.

**i** TIN / SSN:

**i** Legal Business Name:  \*

Country:

City:  State/Territory:  \*

**Note: You must provide at least part of the Legal Business Name & State and then click 'Search'**  
You may also provide complete TIN/SSN (with hyphen/dash in it) or partial city to narrow the search.

---

**Provider User Group Information**

**i** TIN / SSN:

User Group Name:  \* Please provide a unique Group Name.

Company Telephone:  \* Ext:  Valid Telephone Number Format is XXX-XXX-XXXX

Company Fax:  Ext:  Valid Fax Number Format is XXX-XXX-XXXX

Country:

**i** Address 1:  \* **i** Address 2:

**i** City:  \* State/Territory:  \* Zip Code:  \* -

Expected Group Size:  \* Specify the expected size of your User Group.

**Figure 17: New User Registration Screen: User Group Administrator, Provider Group Input Area**

- **Associate to an Existing User Group** – This action should be selected if the user wants to join an existing User Group.
  - User Groups are allowed to have more than one User Group Administrator.

For associating a User Group Administrator or an End User to an existing user group, the user should select an organization and then select the respective user group as shown in Figure 18.

**Access Request**

Community Type: **Provider/Supplier**

Role: **End User**

**Organization Details**

Select the Organization under which the User Group you want to associate with exists, from the list below.

Organization(s): **Saint Joseph Medical Center (Baltimore, MD)** \*  [Click 'New Search' to search for a new Organization](#)

User Group(s): **Select a User Group** \*  
 Select a User Group  
**Aberdeen Fire Department**  
 Abingdon Fire Co  
 Advanced Care Of Salisbury Inc  
 Allegany Ambulance Services  
 Allen Volunteer Fire Co Inc  
 Surrogate - Almar Research Lab (BELTSVILLE, Something)  
 Surrogate - American Diagnostic Lab (SILVER SPRING, MD)  
 Surrogate - American Diagnostic Lab (SILVER SPRING, MD)  
 Surrogate - American Red Cross Holland Labs (ROCKVILLE, MD)  
 Surrogate - Arthritis Research Ctr (GAITHERSBURG, MD)  
 Surrogate - Kaiser Georgetown Comm Health Plan (LANDOVER, MD)  
 Surrogate - Kaiser Georgetown Comm Health Plan (GAITHERSBURG, MD)  
 Surrogate - Labcorp Of America Holdings (TOWSON, MD)  
 Surrogate - Laboratory Corp Of America (GLEN BURNIE, MD)  
 Surrogate - Laboratory Corporation (CHEVY CHASE, MD)  
 Surrogate - Laboratory Corporation (EASTON, MD)

Justification for Action:

OMB: 0938-0989 Effective date: 5/06

\* indicates a required field

Figure 18: New User Registration Screen: Associate a User Group

## 5.0 Login

When the user wants to login to IACS, he needs to take the following actions:

**Action** Navigate to <https://applications.cms.hhs.gov>.

**Action:** Read the contents of the **CMS Applications Portal WARNING/REMINDER** screen, and agree by selecting the **Enter CMS Applications Portal** button. Figure 1 can be referred to for an illustration of this screen.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure 6.

**Action:** Select the [Account Management](#) hyperlink in the menu bar toward the top of the screen.

The screen will refresh and display the **Account Management** screen as illustrated in Figure 7.

**Action:** Select the [My Profile](#) hyperlink in the **Account Management** screen.

The **Terms and Conditions: Privacy Act Statement** screen will display as illustrated in Figure 2.

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

To accept he must then select the ***I Accept the above Terms and Conditions*** box followed by the ***I Accept*** button.

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

After the user accepts the **Terms and Conditions**, the **Login to IACS** screen will display as illustrated in Figure 19.

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)**

### Login to IACS

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

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

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**.

User ID

Password

[Login](#) [Forgot Your User ID?](#) [Forgot Your Password?](#)

The current server time is: Tue Jan 19 12:41:17 EST 2010

Figure 19: Login to IACS Screen

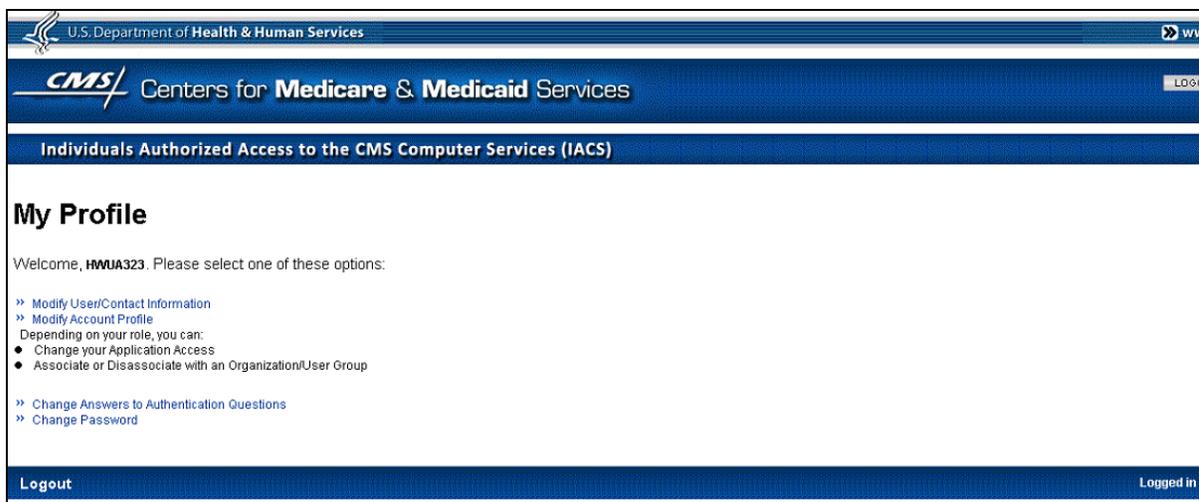
**Action:** Enter the new ***User ID***.

**Action:** Enter the ***Password***.

**Action:** Select the ***Login*** button.

The system will display the **My Profile** screen as illustrated in Figure 20.

**Note:** If this is the first time the user is logging in to IACS he will be prompted to change his temporary, one time password. After he successfully changes his password the system will display the **My Profile** screen.



**Figure 20: My Profile Screen**

**Action:** Select the hyperlink for the function that is needed or logout.

## 6.0 Managing User IDs & Passwords

The IACS password must conform to the following CMS Password Policy:

- The password must be 8 characters long.
- Passwords cannot begin with a number.
- The password must contain at least two letters and one number (no special characters).
- Letters must be mixed case. The password must have at least one upper case and one lower case letter.
- The password must not contain the User ID.
- The password must not contain 4 consecutive characters of any of the user's previous 6 passwords.
- The password must be different from the previous 6 passwords.

In addition:

- The password must not contain any of the following reserved words or number combinations: PASSWORD, WELCOME, CMS, HCFA, SYSTEM, MEDICARE, MEDICAID, TEMP, LETMEIN, GOD, SEX, MONEY, QUEST, 1234, F20ASYA, RAVENS, REDSKIN, ORIOLES, BULLETS, CAPITOL, MARYLAND, TERPS, DOCTOR, 567890, 12345678, ROOT, BOSSMAN, JANUARY, FEBRUARY, MARCH, APRIL, MAY, JUNE, JULY, AUGUST, SEPTEMBER, OCTOBER, NOVEMBER, DECEMBER, SSA, FIREWALL, CITIC, ADMIN, UNISYS, PWD,

SECURITY, 76543210, 43210, 098765, IRAQ, OIS, TMG, INTERNET, INTRANET, EXTRANET, ATT, LOCKHEED

### 6.1 **Password Expiration**

The user's password must be changed at least once every 60 days. When the user logs in after the password expiration, IACS will prompt the user to change his password by displaying the **Change Password** screen. Once the user changes the password successfully, the My Profile screen will be displayed.

**Note:** Should the user login to any of the applications that he has access to with the expired password; IACS will redirect him to the CMS Portal Page allowing him to change his password.

### 6.2 **Disabled Accounts**

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 disabled and he will be unable to access any applications.

The user needs to follow the steps below to re-enable the user's account:

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 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. Login 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.

### 6.3 **E-mail Notifications**

The following E-mail notifications are sent to all IACS users notifying them to change their password prior to the 60 day password expiration policy:

- E-mail sent two weeks prior to password expiration
- E-mail sent one week prior to password expiration
- E-mail sent one day prior to password expiration

The following E-mail notifications are sent to IACS users notifying them that their accounts will be disabled due to 180 days of account inactivity:

- E-mail sent two weeks prior to disabling user account.
- E-mail sent one week prior to disabling user account.

- E-mail sent one day prior to disabling user account.
- E-mail sent on the 180th day after the last successful login notifying the user that their account has been disabled due to inactivity.

## 6.4 **Self Service Features**

Self Service features can be used to retrieve the User ID and Password.

### 6.4.1 **Retrieving User ID**

The user needs to follow the steps below to retrieve his User ID from the Login Screen:

1. From the Login page select the **Forgot Your User ID?** button.
2. When prompted, enter the First Name, Last Name, Date of Birth, SSN and E-mail.

**Note:** For Login instructions Section 5.0 should be referenced.

Alternatively, the user can also use the Account Management screen to retrieve the user ID as follows:

1. Navigate to <https://applications.cms.hhs.gov>
2. Select the [Account Management](#) hyperlink in the menu bar toward the top of the screen.
3. Select the [Forgot your User ID?](#) hyperlink.
4. When prompted, enter the First Name, Last Name, Date of Birth, SSN and E-mail.

### 6.4.2 **Retrieving Password**

The user needs to follow the steps below to retrieve his Password from the Login Screen:

1. From the Login page select the **Forgot Your Password?** button.
2. When prompted, answer the Security Questions and Authentication Questions, and
3. Change the Password.

Alternatively, the user can also use the Account Management screen to retrieve the Password, as follows:

1. Navigate to <https://applications.cms.hhs.gov>.
2. Select the [Account Management](#) hyperlink 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. Select the [Forgot your Password?](#) hyperlink.
6. When prompted, answer the Security Questions and Authentication Questions, and
7. Change the Password.

## 7.0 Annual Certification

Users registered through IACS for CMS Applications are required to certify annually their continued need for access to CMS systems. After November 15, 2010 IACS will begin enforcing the Annual Certification requirement for all Communities and Applications supported by IACS.

The certification due date corresponds to the anniversary of User's IACS User ID creation date. The certification process is initiated with an E-mail notification to the user providing him with details that can be used for completing the certification.

### 7.1 *E-mail Notifications*

#### **E-mail Notifications – Users**

Users will receive an advisory e-mail 45 days prior to their Annual Certification due date. The user will continue to receive e-mails once a week from the initial 45 day e-mail until 15 days prior to his Certification Date. Then, beginning 15 days before his Certification Date, the user will receive an e-mail every day informing him of how many days he has remaining to complete the Certification Request. The user will have until midnight on his Certification Date to submit the Certification Request.

If the user does not submit the Certification Request prior to midnight on the Certification Date, his IACS account will be archived. An e-mail will be sent advising the user his account has been archived. Should he attempt to login to IACS after being archived a message will appear that the account cannot be found.

**Note:** Once the user's account has been archived he will be required to go through New User Registration to establish a new account.

#### **E-mail Notifications – Approvers**

An Approver will receive an e-mail informing him that a user under his authority has submitted a request for certification and that the request is waiting for his review and

approval or rejection. This e-mail will be sent to the approver as soon as the user (under the Approver's authority) has submitted the request for re-certification.

The approver will receive a reminder e-mail 5 days after the submission of request for re-certification and then every day thereafter until the day the certification request is approved / rejected by the Approver or until the certification request expires. Approvers will always have at least 30 days to approve or reject a certification request.

Another type of e-mail that an Approver may receive is one that notifies him that a user under his authority hasn't submitted certification yet. An Approver is any user who has dependent users underneath him. For example, it can be an SO, EPOC, AO, their backups, a Help Desk or in some cases a Business Owner. When a user has taken no action to submit certification, an e-mail will be sent to the Approver advising them that the annual certification of a user directly under their authority is due. This e-mail will be sent to the Approvers 14 days, 7 days and one day before the certification due date unless the user submits certification. This e-mail is not sent to users who do not have any dependent users under their authority.

## 7.2 Certifying

The My Profile screen will have a Certify Account Profile hyperlink as shown in Figure 21. When the user selects this hyperlink, he will be presented with the Terms and Conditions. After accepting the Terms and Conditions, the user will be presented with a screen showing his current access privileges.

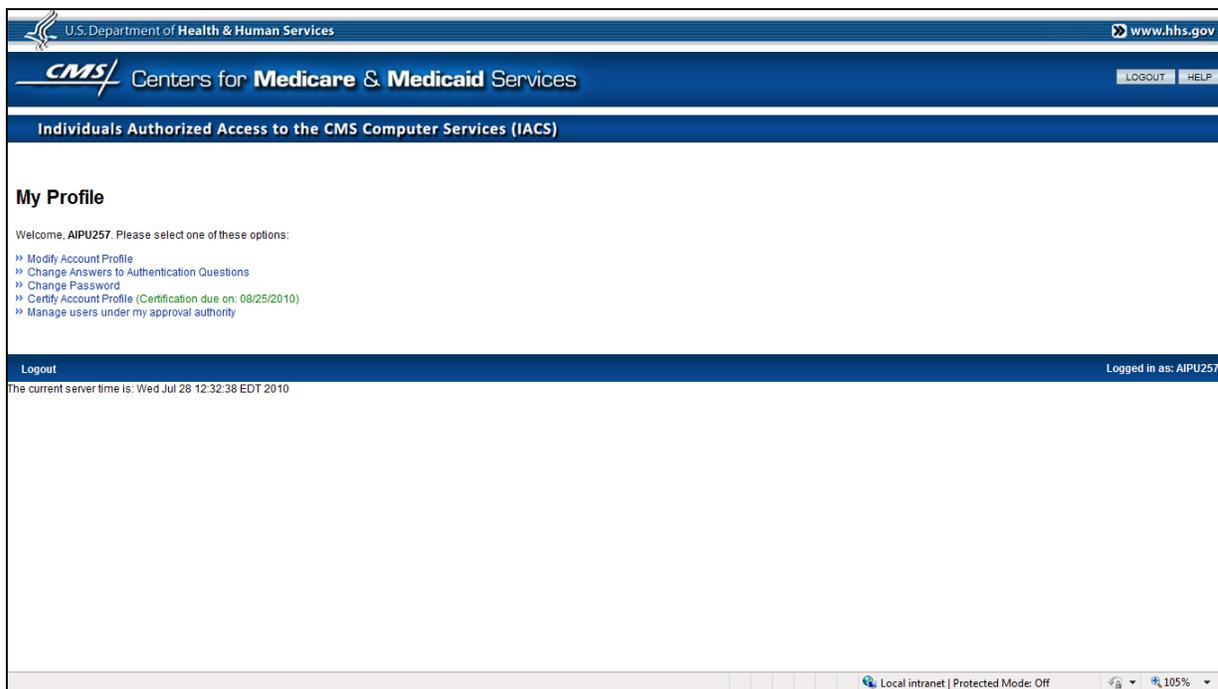


Figure 21: My Profile Screen: Certify Account Profile

When the user selects the [Certify Account Profile](#) hyperlink, the **Annual Certification – Step1: Review Account Profile Information** screen will display showing the user profile as illustrated in Figure 22.

Figure 22: Annual Certification: Review Account Profile Information Screen

**Action:** Select the **Next** button to certify.

**Note:** When the user selects the **Next** button, the system will display the **Annual Certification - Step 2: Submit Certification Request** screen.

**Action:** Select the **Submit** button on the **Annual Certification - Step 2: Submit Certification Request** screen to submit the request for re-certification.

**Note:** When the user selects the **Submit** button the system will display the **Annual Certification - Step 3: Certification Request Acknowledgement** screen.

The **Annual Certification - Step 3: Certification Request Acknowledgement** screen indicates that the certification request has been successfully submitted and provides a request number to use for tracking the certification request.

When the user selects the **OK** button on the **Annual Certification – Step 3: Certification Request Acknowledgement** screen, the screen will close and the system will return to the **My Profile** screen. The user will be sent an E-mail confirming that IACS has received his certification request.

When the user submits the Certification Request, it is routed to the appropriate Approver(s) or EPOC(s), or all of them if his request requires multiple approvers. The user's Approver(s) will have a minimum of 30 days to approve his request for Annual Certification. During that time, the user's Approver will receive reminder e-mails as describe above. If the user's Annual Certification date is reached (or a minimum of 30 days after submission, whichever is later), and the Approver has taken no action, that will be treated the same as a rejected request.

### 7.3 Archiving Accounts

Archiving is the process of removing a user's account information from the IACS system. A user's IACS account will be archived for failing Annual Certification. If the user attempts to login to IACS after his account has been archived, a message will appear on screen that his account cannot be found. If the user is not re-certified for any role or system resource by their Annual Certification due date, then the user's account will be archived.

**Note:** The user's account will only be archived if there are no approved resources assigned to the account. For a user with multiple resources, if even one resource is approved, rejected resources will be removed from the user's profile, but the user's account will not be archived.

**Note:** Once the user's account has been archived he will be required to go through New User Registration to establish a new account.

## 8.0 Using the System – Managing Profiles

The following section provides the most common steps to modify a user's profile. These actions are available only for an existing user. As part of managing a user profile the user can perform the following actions:

- **Modify** User and Professional Contact details pertaining to the user's IACS **Access Profile**.
- **View** details pertaining to the user's IACS **Access Profile**.
- **Request Access/Remove Access** to CMS applications integrated with IACS within and outside his User Community.
- **Request Access/Remove Access** to **other** CMS User Communities integrated with IACS.
- **Modify User's profile** to associate with, disassociate from other Organizations, User Groups and Applications within a User Community.

### 8.1 Modify the User and Professional Contact Information

To modify the IACS account profile the user must first login to IACS using his IACS User ID and password. The **My Profile** screen will display after successful login.

IACS provides the user with the option to modify the **User Information** and/or **Professional Contact Information** he provided during his IACS registration or updated at a later time. If the user changes the telephone number or moves to a different address, he can update that information by selecting this hyperlink. These modifications are basic Modify Profile changes.

When the user selects the [Modify User/Contact Information](#) hyperlink, the **Modify User/Contact Information** screen will display as illustrated in Figure 23.

**Figure 23: Modify User/Contact Information Screen**

**Action:** Modify the *User and/or Professional Contact Information* as needed.

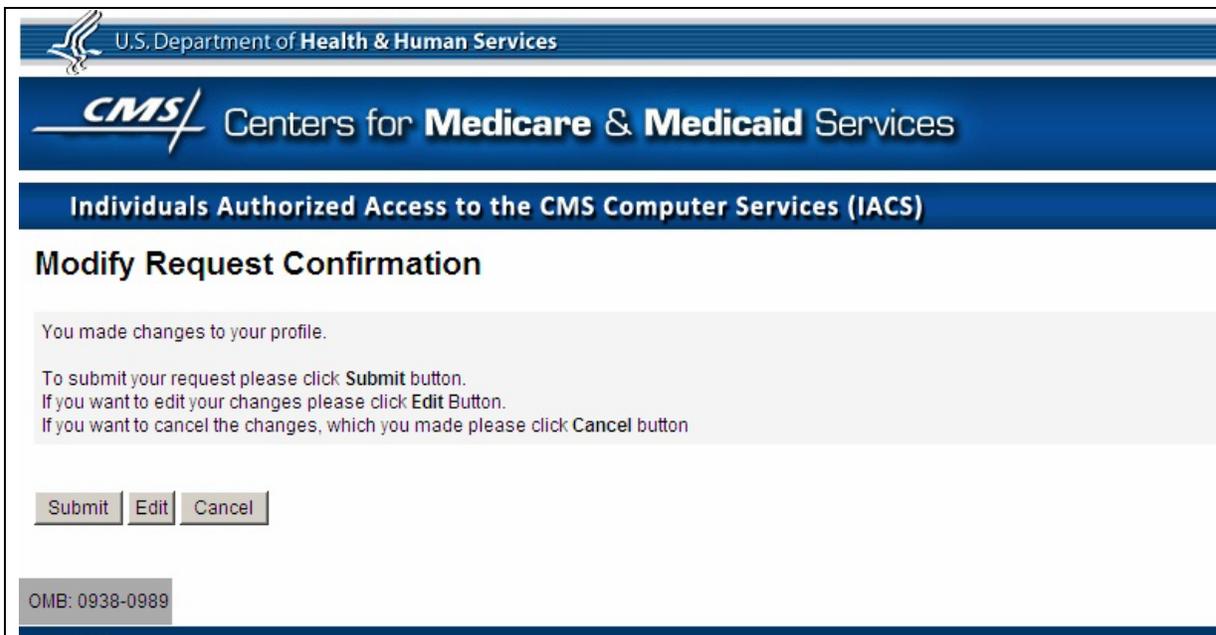
**Note:** If the user makes changes to his E-mail address, the screen will refresh when he leaves the *E-mail* field after making the changes and a *Confirm E-mail Address* field will appear in which the user must confirm his new E-mail address.

The following validation processes will apply to *User Information* changes:

- A *First Name* change will be validated against information on file at the SSA.
- A *Last Name* change will be validated against information on file at the SSA.
- A *Date of Birth* change will be validated against information on file at the SSA.
- An *E-mail Address* change will be validated to be unique as stored in IACS.

**Action:** Select the *Next* button after making changes and proceed to the end of this Section for information on how to complete the changes.

When the user selects the *Next* button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure 24: Modify Request Confirmation Screen.



U.S. Department of Health & Human Services

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

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

### Modify Request Confirmation

You made changes to your profile.

To submit your request please click **Submit** button.  
If you want to edit your changes please click **Edit** Button.  
If you want to cancel the changes, which you made please click **Cancel** button

OMB: 0938-0989

**Figure 24: Modify Request Confirmation Screen**

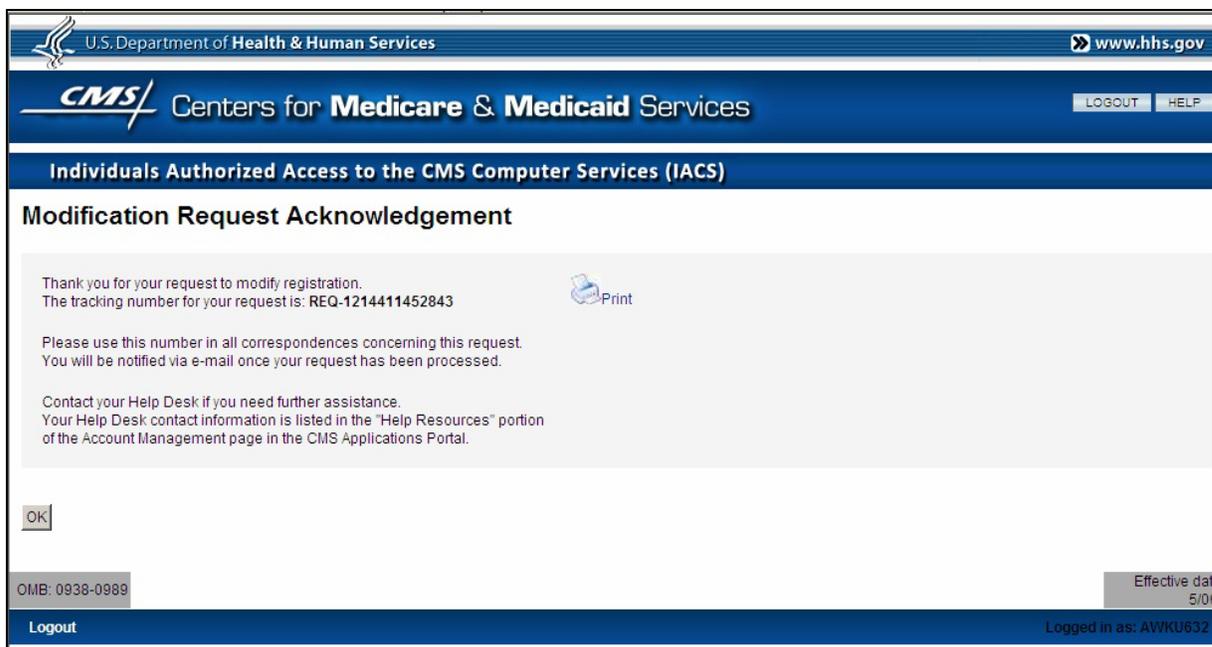
**Action:** Select the **Submit** button to submit the modification request.

**Note:** The modifications will not be completed unless the **Submit** button is selected.

The **Edit** button should be selected to return and edit the changes.

If the user selects the **Cancel** button, his request will be cancelled and any modification that was entered will be lost. A screen indicating this will be displayed. The user must select the **OK** button to confirm the action, exit that screen and close the browser window.

When the user selects the **Submit** button, a **Modification Request Acknowledgement** screen will display as illustrated in Figure 25. He must select the **OK** button to complete the account profile modification.



**Figure 25: Modification Request Acknowledgement Screen**

The **Modification Request Acknowledgement** screen indicates that the request has been successfully submitted and provides a tracking number for the request. This tracking number should be recorded and used if there are any questions about the status of the request.

The information contained on the screen can be printed by selecting the **Print** icon.

**Action:** Select the **OK** button to complete the Modify Account Profile process.

The **Modification Request Acknowledgement** screen will close and the system will return to the **My Profile** screen. This screen indicates that the change request has been successfully submitted.

The user will be sent an E-mail confirming that IACS has received his request and providing him with a Request Number. He should use that request number to contact the Helpdesk regarding the request. The user should also have the request number from the Modification Request Acknowledgement screen available for the Helpdesk.

If an E-mail notification is not received within 24 hours after the user modifies his profile, he will need to contact the Helpdesk. For information regarding Helpdesks, Section 9.2 should be reviewed.

## 8.2 View User's Access Profile

When the [Modify Account Profile](#) hyperlink is selected, the **Modify Account Profile** screen will display and show the information in the user's account profile that is specific to his role and user community.

At the top of the screen, the **User Information** and **Professional Contact Information** are displayed.

In the **Access Request** area of this screen, the approved access information will be displayed in the **View My Access Profile** table as illustrated in Figure 26. If the user has a role in more than one application or community, each application or community will be displayed in a separate row in the table.

The **Select Action** field provides a drop-down list from which the user can select the desired action. These actions are illustrated in the example in Figure 26.

The screenshot shows the 'Access Request' interface. A red circle highlights the 'Select Action' dropdown menu, which is open and shows the following options: 'View My Access Profile', 'Modify Provider/Supplier Profile', 'Add Application', 'Add Community', and 'View My Access Profile'. The 'View My Access Profile' option is currently selected. Below the dropdown, the 'View My Access Profile' section is visible, showing a table with the following data:

Profile Summary	Possible Actions
<b>Organization / User Group (Role):</b> Greg's co / Accounting (End User)	<b>As an End User:</b> <ul style="list-style-type: none"> <li><input type="radio"/> View User Group Details</li> <li><input type="radio"/> Request access to applications like CARE/PS&amp;R</li> <li><input type="radio"/> Disassociate from User Group</li> </ul> <b>Additionally, you can:</b> <ul style="list-style-type: none"> <li><input type="radio"/> Create an Organization profile</li> <li><input type="radio"/> Associate to an Organization</li> <li><input type="radio"/> Create a User Group</li> <li><input type="radio"/> Associate to a User Group</li> </ul>

A 'Cancel' button is located at the bottom left of the screen. A note at the bottom right states: '\* indicates a required field'.

**Figure 26: Modify Account Profile Screen: Select Action Drop-down List**

### 8.3 Adding CMS Applications

If the user selects the action, **Add Application**, the screen will refresh and he will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure 27. The applications he will be able to add are those applications integrated with IACS and outside his User Community.

The following rules need to be followed when requesting access to roles in other applications:

- For non-community based Applications, the user may only request and have one role for a CMS application.
- The user cannot be an approver and a user for the same application.

The **Select Application** field contains a drop-down list of the CMS applications integrated with IACS as illustrated in Figure 27.

**Professional Contact Information**

Office Telephone: 427-120-0000 \* Ext: 424 Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: dcnrvfd \* Company Telephone: 427-120-0000 Ext: 424

Country: United States

Address 1: bwwcoo \* Address 2: hcxhqq

City: eloux \* State/Territory: AZ \* Zip Code: 42635 \* - 4253

**Access Request**

Select Action: Add Application

Select Application: Select Application \* Availability of CMS Applications / User Communities

Justification for Action:

- Select Application
- COB
- CSR
- DMEPOS
- ECRS
- HETS UI
- HPG
- MA/MA-PD/PDP/ICC
- PQRI

\* indicates a required field

Next Cancel

OMB: 0938-0889 Effective date: 5/06

Logout Logged in as: LCSF539

**Figure 27: Modify Account Profile Screen: Access Request Area – Select Application Drop-down List**

**Action:** Select the desired **Application** from the drop-down list.

#### 8.4 Adding Community

If the user selects **Add Community**, the screen will refresh and he will be presented with a screen where the **Access Request** area is similar to the one shown in Figure 28.

The *Select Community* field provides a drop-down list containing the other CMS communities integrated with IACS as illustrated in Figure 28.

The community names shown on the drop-down list may vary depending on the number of CMS communities integrated with IACS and the current access profile.

The screenshot shows a web form titled "Access Request". At the top, there is a "Select Action:" dropdown menu with "Add Community" selected. Below this is a "Select Community:" dropdown menu with "Select Community" selected. To the right of this dropdown is a red asterisk and the text "Availability of CMS Applications / User Communities". A list of options is displayed below the dropdown: "Select Community", "CMS Contractor", "Demonstrations", and "FI/Carrier/MAC". Below the list is a red asterisk. To the left of the list is the label "Justification for Action:". At the bottom left, there are two buttons: "Next" and "Cancel".

Figure 28: Modify Account Profile Screen: Select Community Drop-down List

**Action:** Select the desired **Community** from the *Select Community* field drop-down list.

**Action:** Enter a brief justification statement for the action in the *Justification for Access* field.

**Action:** Select the **Next** button when the user has completed the modification.

When the user selects the **Next** button, the system will display the **Role Selection** screen for the User Community that was selected. A role must be selected to proceed.

### 8.5 **Associating with New Groups, Organizations and Adding Community Based Applications**

If the user selects the action, **Modify Provider/Supplier Profile**, the screen will refresh and he will be presented with a screen in which the **Access Request** area is similar to the one shown in Figure 29.

**Professional Contact Information**

Office Telephone: 783-120-0000 \* Ext: 781 Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: yyctiq \* Company Telephone: 783-120-0000 Ext: 781

Country: United States

Address 1: zixebf \* Address 2: zixebf

City: waowmo \* State/Territory: AZ \* Zip Code: 78149 \* - 7813

**Access Request**

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	hfruei	cxsak	Community	End User	

Additional Access Request(s):

Justification for Action:

\* indicates a required field

Next Cancel

**Figure 29: Modify Account Profile Screen: My Current Access Profile Table and Additional Access Requests Field**

In the **Access Request** area of the screen, a **My Current Access Profile** table will display the user's access profile information that will be expanded to show the following:

- The **Organization** with which he is associated.
- The **User Group** with which he is associated, if the user was approved for a role of User Group Administrator or End User within a User Group.
- The **Role Type**.
- The **Role** within the Role Type.
- An **Action** field that indicates there is a drop-down list, although the default view in this field is blank.

The drop-down list of actions that the user can select in the **Action** field depends on his roles and any previous modifications that he may have made to his IACS account profile.

**Note:** If the user has a role in more than one organization or application, each role will be displayed in a separate row in the table.

The **Action** field actions that are available are briefly described below. These actions will be role-specific and can include:

- **View User Group Details** – for both User Group Administrators and End Users
  - An **edit** function is available for User Group Administrators only.
- **View Organization Details** – for both Security Officials and Backup Security Officials
  - An **edit** function is available for Security Officials only.

- **Disassociate from an Organization** – for Backup Security Officials

**Note:** A Security Official must contact the Helpdesk to disassociate from an Organization. A Backup Security Official must be approved to assume the role of Security Official prior to disassociating the Security Official from the Organization.

- **Disassociate from a User Group** – for both User Group Administrators and End Users
- **Request Access to an Application** – for applications *within the User Community* for both User Group Administrators and End Users
- **Remove Access from an Application** – for approved application roles *within the User Community* for both User Group Administrators and End Users.

The *Action* field in the **My Current Access Profile** table provides a drop-down list of actions for each role the user has in IACS. An individual with a single end user role will look like the example illustrated in Figure 30.

The screenshot shows the 'Access Request' form. At the top, there is a 'Select Action' dropdown menu currently set to 'Modify Provider/Supplier Profile'. Below this, the 'Community Type' is 'Provider/Supplier'. The 'My Current Access Profile' table has the following data:

Organization	User Group	Role Type	Role	Action
Greg's co	Accounting	Community	End User	[Open Dropdown]

The dropdown menu is open, showing the following options: 'View User Group Details', 'Disassociate from this User Group', and 'Request Access to Application'. Below the table, there is an 'Additional Access Request(s)' field and a 'Justification for Action' field with a red asterisk indicating it is required. At the bottom, there are 'Next' and 'Cancel' buttons, and a footer with 'OMB: 0938-0989' and 'Effective date: 5/06'.

**Figure 30: Modify Account Profile Screen: My Current Access Profile Table – Action Drop-down List**

**Action:** Select the **Action** that is required to be taken.

An *Additional Access Requests* field and a *Justification for Action* field are also displayed.

The drop-down list of actions in the *Additional Access Requests* field is briefly described below and illustrated in Figure 31.

## User Group Actions

- **Create a new User Group** – This action will require the user to assume the role of User Group Administrator as he creates a User Group within an existing IACS Organization.
- **Associate to a User Group as an Administrator** – This action will require the user to assume the role of User Group Administrator as he associates to a User Group within an existing IACS Organization.
- **Associate to a User Group as an End User** – This action will require the user to assume the role of End User for an existing User Group within an IACS Organization.

## Organization Actions

- **Create a new Organization** – This action will require the user to assume the role of Security Official as he creates an IACS Organization.
- **Associate to an Organization as a Backup Security Official** – This action will require the user to assume the role of Backup Security Official for an existing IACS Organization.

**Access Request**

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	End User	<input type="text"/>
	Greg's co	Accounting	Application	CARE Read Only	<input type="text"/>

Additional Access Request(s):

Justification for Action:

- User Group Actions**
  - Create a new User Group
  - Associate to a User Group as an Administrator
  - Associate to a User Group as an End User
- Individual Practitioner Actions**
  - Create an Individual Practitioner Profile
- Organization Actions**
  - Create a new Organization
  - Associate to an Organization as a Backup Security Official

\* indicates a required field

Next Cancel

**Figure 31: Modify Account Profile Screen: Additional Access Requests Drop-down List**

The **Provider/Supplier** and **FI/Carrier/MAC** User Communities have community-based applications for which the user may request access.

### Adding Community Based Application:

To add an application within a User Community, the user must first have an authorized role in that community.

Requesting access to an application in a CMS User Community is a simple two-step process:

1. The user must first select the application from the *Select Application* field drop-down list.
2. The user must then select his role within that application.

**Action:** Select the **Request Access to Application** from the **My Current Access Profile** table **Action** field.

The screen will refresh and display an **Access to Applications** area that contains a *Select Application* and *Justification for Action* field. The applications available in each CMS User Community will be different. The *Select Application* field drop-down lists are illustrated in Figure 32 for the **Provider/Supplier** Community.

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
SamBiz	tpwxrq	Application	PQRI User	
SamBiz	tpwxrq	Community	End User	Request Access to Application

Additional Access Request(s):

Access to Applications

Request Access to Application for User Group: tpwxrq

Select Application: \*

- CARE (CARE Application)
- PS&R (PS&R Application)

Justification for Action: \*

\* indicates a required field

Next Cancel

**Figure 32: Modify Account Profile Screen: Request Access to Provider/Supplier Community Applications, Select Application Drop-down List**

Application roles in the Provider/Supplier Community are only available to users with End User and User Group Administrator roles.

## 8.6 Disassociating Organizations, User Groups, Communities or CMS Applications

The **Provider/Supplier** Community will be used to illustrate the disassociate/remove procedures for account modification.

**Note:** The **FI/Carrier/MAC** and Contractor Community disassociate/remove procedures will be the same or very similar. There are no disassociating procedures for the Demonstrations Community.

When the user selects the [Modify Account Profile](#) hyperlink, the **Modify Account Profile** screen will display and show the information in the account profile that is specific to his role and user community.

At the top of the screen, the **User Information** and **Professional Contact Information** are displayed but cannot be modified.

In the **Access Request** area of this screen the approved access information will be displayed. This information will reflect the User Community and role. A *Select Action* field has a drop-down list in which one of the actions is **Modify <Your User Community name will display here> Profile**.

When the user selects the **Modify <User Community name > Profile**, the action will allow him to use the disassociate/remove functions to modify his user community profile. These modifications all fall within your User Community. This should be selected to perform any of the disassociate actions available, such as those listed below:

- **Organization Modifications**
  - Disassociate from an Organization.
- **User Group Modifications**
  - Disassociate from a User Group.
- **Remove access** for applications integrated with IACS and available to the user within his User Community.

**Note:** The Demonstrations Communities will not display this action as there are currently no other applications available for access within those communities.

### 8.6.1 Disassociating from an Organization

If the user is a Security Official and wants to disassociate from his Organization, he must contact the Helpdesk and request that they disassociate him from his Organization. A Backup Security Official must be approved to assume the role of Security Official prior to disassociating the Security Official from the Organization.

If the user is a **Backup Security Official** and wishes to select **Disassociate from this Organization**, he should select that action from the *Action* field in the **My Current Access Profile** table as illustrated in Figure 33.

Country:  \*

Address 1:  \* Address 2:

City:  \* State/Territory:  \* Zip Code:  \* -

**Access Request**

Select Action:

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Howell Medical Hospital	Not Applicable	Community	Backup Security Official	<input type="text" value="View Organization Details"/> <input type="text" value="Disassociate from this Organization"/>

Additional Access Request(s):

Justification for Action:

\* indicates a required field

**Figure 33: Modify Account Profile Screen: Disassociate from this Organization, Select Action Drop-down List**

**Action:** Select the *Disassociate from this Organization* from the *My Current Access Profile* table *Action* field.

The screen will refresh and a confirmation message and check box will appear above the *Justification for Action* field as illustrated in Figure 34.

**Note:** The message text will read, *I confirm that I wish to remove myself from the role of Backup Security Official from Organization <here the Organization Name will be inserted>*.

**Access Request**

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Howell Medical Hospital	Not Applicable	Community	Backup Security Official	<span>Disassociate from this Organization</span>

Additional Access Request(s):

Confirm Action:  \* I confirm that I wish to remove myself from the role of Backup Security Official from Organization: Howell Medical Hospital

Justification for Action:

\* indicates a requirement

Next Cancel

**Figure 34: Modify Account Profile Screen: Disassociate from this Organization, Confirm Action Check Box**

**Action:** Select the Check Box to confirm that the user wants to disassociate from this Organization.

**Action:** Enter a brief justification statement in the *Justification for Action* field.

**Action:** Select the **Next** button when the user has completed the justification statement.

The system will display the **Modify Request Confirmation** screen as illustrated in Figure 24: Modify Request Confirmation Screen. The User Guide information for this screen and Figure 25: Modification Request Acknowledgement Screen should be reviewed to see how to complete this **Modify Account Profile** process.

**Note:** The process to disassociate a User Group Administrator and End User from an Organization is similar to the process described above for Backup Security Official.

### 8.6.2 Disassociating from an User Group

If you are a **User Group Administrator** in an organization with more than one User Group Administrator and wish to select **Disassociate from this User Group**, select that action from the *Action* field.

Select the **Disassociate from this User Group** action from the **My Current Access Profile** table *Action* field.

**Note:** If you do not have another role within the Organization, the **Disassociate from this User Group** action will also disassociate you from the Organization.

The screen will refresh and a confirmation message and check box will appear above the *Justification for Action* field.

**Note:** The message text will read, ***I confirm that I wish to remove myself from the role of User Group Administrator from User Group <here the User Group Name will be inserted>.***

**Action:** Select the Check Box to confirm that you want to disassociate from this User Group.

**Action:** Enter a brief justification statement for the modification in the *Justification for Action* field.

**Action:** Select the **Next** button when you have completed your justification statement.

The system will display the **Modify Request Confirmation** screen as illustrated in Figure 24: Modify Request Confirmation Screen. The User Guide information for this screen and Figure 25: Modification Request Acknowledgement Screen should be reviewed to see how to complete this **Modify Account Profile** process.

If you are the only User Group Administrator in your organization and select **Disassociate from this User Group** from the drop-down list of actions, the screen will refresh and a message will appear above the *Justification for Action* field as illustrated in Figure 35.

**Note:** The message text will read, ***At least one more User Group Administrator must exist in your User Group <here the User Group Name will be inserted> to allow yourself to be disassociated from the role of User Group Administrator.***

You will not be allowed to disassociate from a User Group until there is another User Group Administrator associated with that User Group.

**Access Request**

Select Action:  Modify Provider/Supplier Profile

Community Type: Provider/Supplier

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Greg's co	Accounting	Community	User Group Administrator	Disassociate from this User Group

Additional Access Request(s):

At least one more User Group Administrator must exist in your User Group: Accounting to allow yourself to be disassociated from the role of: User Group Administrator

Justification for Action:

\* indicates a required field

**Figure 35: Modify Account Profile Screen: Disassociate from this User Group, Warning Message**

**Action:** Select **another action** from the drop-down list in the *Action* field or the *Additional Access Requests* field, or select the **Cancel** button to exit and return to the **My Profile** screen.

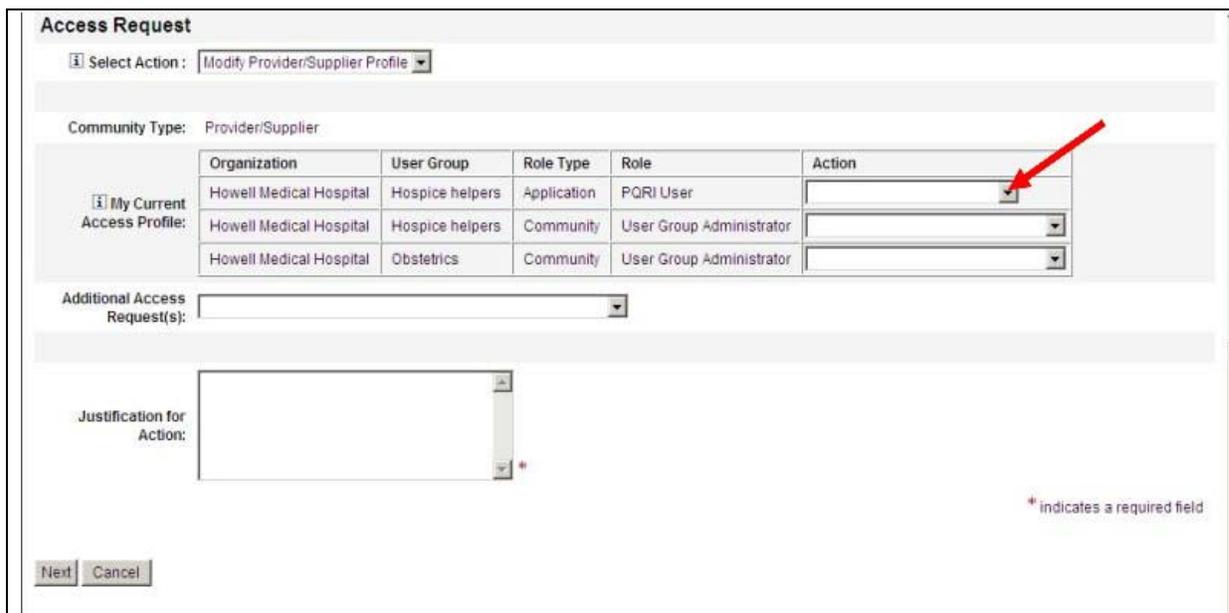
**Note:** The process to disassociate an End User from a User Group is similar to the process described above for User Group Administrator.

### 8.6.3 Disassociating or Remove access for applications integrated with IACS

The user may want to remove access to a community based application from his IACS account profile. This User Guide will illustrate how to do this using the PQRI application in a Provider/Supplier account profile as an example.

The removal process is the same for all community based applications within the CMS User Communities.

**Note:** Each application role is specific to a User Group within the user's Organization. An End User or User Group Administrator may have different roles for the same application in different User Groups. When ready to remove access to an application, the user should be careful to select the *Action* field from the desired role.



**Access Request**

Select Action:

Community Type: Provider/Supplier

	Organization	User Group	Role Type	Role	Action
My Current Access Profile:	Howell Medical Hospital	Hospice helpers	Application	PQRI User	<input type="text" value=""/>
	Howell Medical Hospital	Hospice helpers	Community	User Group Administrator	<input type="text" value=""/>
	Howell Medical Hospital	Obstetrics	Community	User Group Administrator	<input type="text" value=""/>

Additional Access Request(s):

Justification for Action:

\* indicates a required field

Next Cancel

**Figure 36: Modify Account Profile Screen: My Current Access Profile Table, Community and Application Roles**

**Action:** Review the **My Current Access Profile** table for the application role that needs to be removed.

**Action:** Select the **Remove Access from PQRI** action from the *Action* field drop-down list in the row displaying the application role that needs to be removed, in this example, the PQRI User role.

When the **Remove Access from PQRI action** is selected, the screen will refresh and a confirmation message and check box will appear above the *Justification for Action* field as illustrated in Figure 37.

**Access Request**

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

	Organization	User Group	Role Type	Role	Action
My Current Access Profile:	Howell Medical Hospital	Hospice helpers	Application	PQRI User	Remove Access from: PQRI
	Howell Medical Hospital	Hospice helpers	Community	User Group Administrator	
	Howell Medical Hospital	Obstetrics	Community	User Group Administrator	

Additional Access Request(s):

Confirm Action:  \* I confirm that I wish to remove myself from the role of PQRI User from User Group: Hospice helpers

Justification for Action: Required to remove access.

\* indicates a required field

Next Cancel

**Figure 37: Modify Account Profile Screen: Remove Access from PQRI Application, Confirm and Justify Action**

**Action:** Select the **Check Box** to confirm removal from the PQRI User role.

**Action:** Enter a brief justification statement for the modification in the *Justification for Action* field.

**Action:** Select the **Next** button when the justification statement has been completed.

The system will display the **Modify Request Confirmation** screen as illustrated in Figure 24: Modify Request Confirmation Screen. The User Guide information for this screen and Figure 25 should be reviewed to see how to complete this **Modify Account Profile** process.

## 9.0 Troubleshooting & Support

### 9.1 Error Messages

IACS provides a variety of on-screen error messages. These messages are self-explanatory and guide the user in how to remedy the error.

The following Sections illustrate one type of error message and instructions to the user. The examples are of the error messages and instructions that will appear for validation failures.

#### 9.1.1 Validation Failure - First Attempt

If the User Information data fails validation on the first attempt, the **New User Registration** screen will refresh and display a warning message in red above the *E-mail* address field as illustrated in Figure 38.

The screenshot shows the 'New User Registration' screen for the U.S. Department of Health & Human Services, Centers for Medicare & Medicaid Services (CMS). The page title is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'New User Registration'. Below the heading, there is a note: '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 (Mr.), First Name (Pat), Last Name (Smith), Suffix (Jr.), Middle Initial, Professional Credentials (PhD), Social Security Number (222-11-2222), and Date of Birth (01/01/1970). A red warning message is displayed above the E-mail field: 'Your details cannot be validated against the Social Security Administration. Please ensure that correct details are entered above and click Next. After 3 failed attempts, your registration will be cancelled.' The E-mail field contains 'pats@agip.com' and the Confirm E-mail field also contains 'pats@agip.com'. A blue note below the E-mail field states: 'Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.' A legend indicates that an asterisk (\*) denotes a required field. At the bottom left, there are 'Next' and 'Cancel' buttons.

**Figure 38: New User Registration Screen: Validation Failure Message, First Attempt**

**Action:** Enter the User Information that has been entered and review it for correctness.

**Action:** Make any needed changes to the User Information.

**Action:** Select the **Next** button when done.

When the user selects the **Next** button the system will attempt to validate the SSA data again. If a problem is encountered again, a set of questions will appear on the screen as shown in the example in Figure 39.

#### 9.1.2 Validation Failure – Second Attempt

If the User Information data fails validation on the second attempt, the **New User Registration** screen will refresh and display two simple questions for the user to answer as illustrated in Figure 39. These questions are being asked to ensure that the registration request is not being generated by an automated system.

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

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

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

### New User Registration

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

**User Information**

Title:  First Name:  \* Last Name:  \* Suffix:  \*

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

Social Security Number:  \* Valid SSN Format is XXX-XX-XXXX Date of Birth:  \* Valid Date of Birth format is mm/dd/yyyy

Question	Answer
<input type="checkbox"/> Which is more likely to sink in water: a truck or a feather? (Hint: truck, feather)	<input type="text"/> *
What color is a black car? (Hint: black, blue, white)	<input type="text"/> *

You have been presented with two simple validation questions because the details you entered could not be validated with the Social Security Administration. Please provide correct answers and click Next.

E-mail:  \* Confirm E-mail:  \*

Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

\* indicates a required field

**Figure 39: New User Registration Screen: Validation Failure Message, Second Attempt with Questions**

**Action:** Correct the User Information that has been entered.

**Action:** Answer both questions correctly.

**Note:** Numeric characters should not be used to answer the questions. Any number answers should be spelled out, for example, the number 4 should be spelled out as “four.”

**Action:** Select the **Next** button.

The system will attempt to validate both the user information and the answers to the questions.

If either fails validation, the screen will refresh and display the appropriate warning message in red above the questions. The warning message illustrated in the example in Figure 40 is for incorrect answers to the two simple questions.

The screenshot shows the 'New User Registration' screen. At the top, it says 'U.S. Department of Health & Human Services' and 'Centers for Medicare & Medicaid Services'. Below that, it says 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'New User Registration'. A message states: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' Under 'User Information', there are fields for Title (Mr.), First Name (Pat), Last Name (Smith), Suffix (Jr.), Middle Initial, and Professional Credentials (PhD). Below that is the Social Security Number (222-11-2222) and Date of Birth (01/01/1970). A red warning message says: 'The answers to the simple validation questions are not correct. Please provide correct answers to the questions. After 3 failed attempts, the registration will be cancelled.' There are two validation questions: 'Which is more likely to sink in water: a truck or a feather?' with the answer 'feather', and 'What color is a black car?' with the answer 'blue'. Below the questions, a message says: 'You have been presented with two simple validation questions because the details you entered could not be validated with the Social Security Administration. Please provide correct answers and click Next.' At the bottom, there are fields for E-mail (pats@agip.com) and Confirm E-mail (pats@agip.com). A note at the bottom right says '\* indicates a required'. At the bottom left, there are 'Next' and 'Cancel' buttons.

**Figure 40: New User Registration Screen: Validation Warning Message, Invalid Question Answers**

**Action:** Correct the User Information that has been entered.

**Action:** Answer both questions correctly.

**Note:** Numeric characters should not be used to answer the questions. Any number answers should be spelled out, for example, the number 4 should be spelled out as “four.”

**Action:** Select the **Next** button.

**Note:** If either the User Information or the answers to the questions fail validation this second time, the user’s registration will be cancelled.

**Note:** If the user’s SSA data cannot be validated, he should contact his local SSA office for assistance. SSA contact information can be found at: <http://www.ssa.gov/>.

If the information that was entered is successfully validated, the **E-mail Address Verification** screen will display as illustrated in Figure 11.

## 9.2 Support

There are multiple Helpdesks supporting IACS registrants where users can go to for help with login or other questions.

**Note:** For the 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 **CARE** is the RTI Helpdesk. The phone number is 1-866-412-1510. They can be contacted at [help@pacdemo.rti.org](mailto:help@pacdemo.rti.org).

The Helpdesk associated with **HETS UI** is the MCARE Helpdesk. 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 **Medicare Advantage/Prescription Drug Plans** is the MAPD Helpdesk. The phone number is 1-800-927-8069. They can be contacted at [mapdhelpdesk@cms.hhs.gov](mailto:mapdhelpdesk@cms.hhs.gov).

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

The Helpdesk associated with the **Quality Improvement Organizations' (QIO) 9th Scope of Work Care Transitions Theme** is the Quality Improvement Organization Support Contractor (QIOSC) Helpdesk. The phone number is 1-800-676-0724. They can be contacted at [helpqiocare@cfmc.org](mailto:helpqiocare@cfmc.org).

## 10.0 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.
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.
Legal Business Name	The legal business name is the name specified on the IRS CP-575 Form.
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.
Medicare Part A	Hospital insurance that pays for inpatient hospital stays, care in a skilled nursing facility, hospice care, and some home health care.
OIS	Office of Information Systems – a part of the GAO.
Provider User Group	This is a narrowly focused group within an Organization such as a physical therapy group in a hospital.

Term	Definition
SSA	Social Security Administration – the government agency that administers the social security program.
SSN	Social Security Number – a unique identification number assigned to individuals by the SSA.
Surrogate User Group	This is a group that is working on behalf of an existing Organization such as a billing agency working for a medical association.

## 11.0 Acronyms

This section defines acronyms used or referenced in this document.

Acronym	Definition
AO	Authorized Official
BAO	Backup Authorized Official
BSO	Backup Security Official
CARE	Continuity Assessment Record and Evaluation
CBIC	Competitive Bid Implementation Contractor
CMS	The Centers for Medicare & Medicaid Services
DOB	Date of Birth
EHRD	Electronic Health Record Demonstration
EUS	External User Services
FI	Fiscal Intermediary
HETS UI	HIPAA Eligibility Transaction System User Interface
HIPAA	Health Insurance Portability and Accountability Act
IACS	Individuals Authorized Access to the CMS Computer Services
ID	Identification
MAC	Medicare Administrative Contract
PQRI	Physician Quality Reporting Initiative
SO	Security Official
SSA	Social Security Administration
SSN	Social Security Number
TIN	Tax Identification Number
UGA	User Group Administrator