Health Plan Management System

Part C Improper Payment Measure (IPM)

Module User Guide

Version: Plan User | Revised: October 2022

Centers for Medicare & Medicaid Services

Table of Contents

Table of Figures

1.   Introduction

In order to comply with the Payment Integrity Information Act of 2019 (PIIA), the Centers for Medicare & Medicaid Services (CMS) annually measures and reports a projected payment error rate for the Medicare Part C program. CMS conducts the annual Medicare Part C Improper Payment Measure (IPM) activity to validate the accuracy of risk adjustment data submitted by Medicare Advantage (MA) Organizations for the purpose of estimating the Part C error rate.

The Health Plan Management System (HPMS) Part C IPM module described in this document allows MA Organizations to submit Medical Records in support of CMS Hierarchical Condition Categories (CMS-HCCs). MA Organizations can also view CMS-provided documentation and reports through the module.

Note:

Data represented in the various example figures of this user guide is fictitious and displayed for illustration purposes only. No real-world data related to MA Organizations, beneficiary Protected Health Information (PHI), or beneficiary Personally Identifiable Information (PII) is included in this document.

2.   Accessing & Navigating Part C IPM

Part C IPM User Access

The HPMS Part C IPM module allows MA Organization users to submit medical records in support of CMS-HCCs for enrollees selected for an IPM activity. To access the HPMS Part C IPM module, you must:

- ✓ Have a CMS EUA User ID with access to either the Part C Submission – Plan or Part C IPM Reports – Plan acess types in HPMS (see Figure 1); and
- ✓ Have authorization to access to an MA Contract with enrollees sampled as part of the Part C IPM activity.

You can view which access types are assigned to your CMS ID by navigating to **User Resources** on the top right > **My Account** > **User Access Report**.

Figure 1 – Part C IPM MA Organization User Access

Access Type	Description	Available Functionalities
Part C IPM Submission – Plan	• Able to submit Medical Records for a sample. • Only able to access samples for which the user's contract has been selected.	• Select Sample • Documentation • Submission tab *(Upload Medical Records only)* • Document Library tab
Part C IPM - Document Library - CEO and Compliance Officer Only	• Able to view CEO/MCO files from the Document Library for assigned contracts. • CEOs and Medicare Compliance Officers only. • Only able to access samples for which the user's contract has been selected.	• Select Sample • Documentation • Document Library tab
Part C IPM Reports – Plan	• Able to view Part C IPM Reports (available data restricted by user access). • Only able to access samples for which the user's contract has been selected.	• Select Sample • Documentation • Reports tab • Document Library tab

How to Access Part C IPM

To access the Part C IPM module:

1. From the HPMS home page, click on the **Monitoring** tab in the HPMS top navigation bar.

2. Select the **Part C IPM** menu item (Figure 2) to be directed to the Part C IPM Start Page. (See the Part C IPM Start Page section below.)

Figure 2 – Accessing Part C IPM
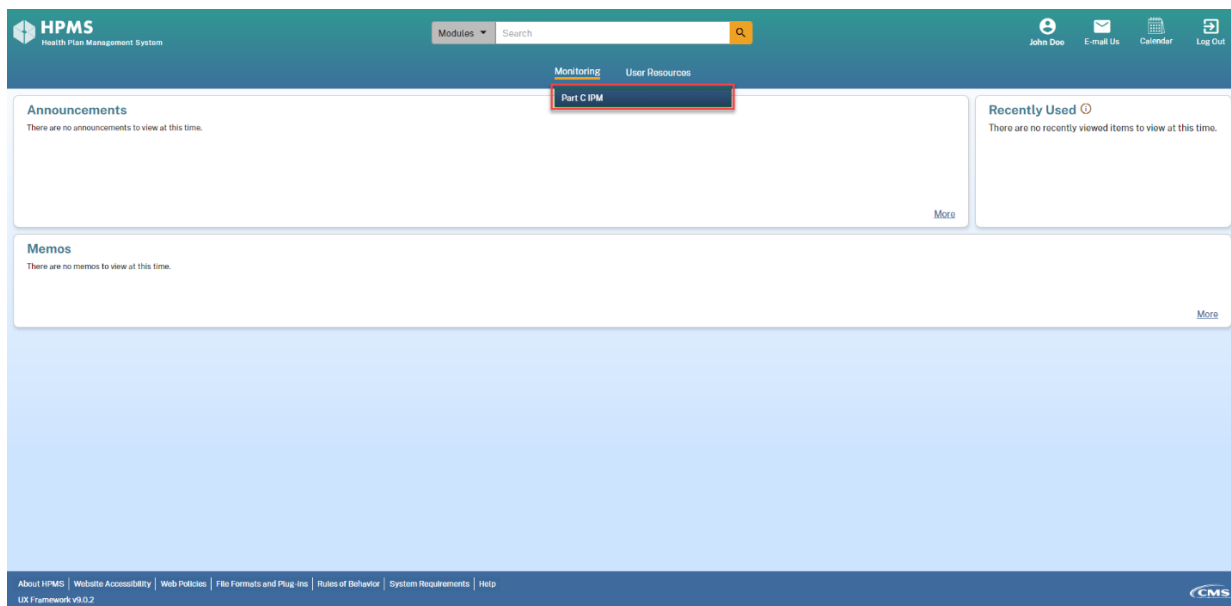
Navigation

Navigating HPMS

HPMS has a toolbar with standard links which allow you to navigate within the Health Plan Management System (Figure 3).

Figure 3 – Navigation

Within each HPMS module (including Part C IPM), the following navigation icons can be found across the top of each page:

- **HPMS Menu ☰ :** Access other HPMS modules or resources.
- **HPMS Logo:** Return to the HPMS homepage.
- **Home:** Return to the HPMS homepage.
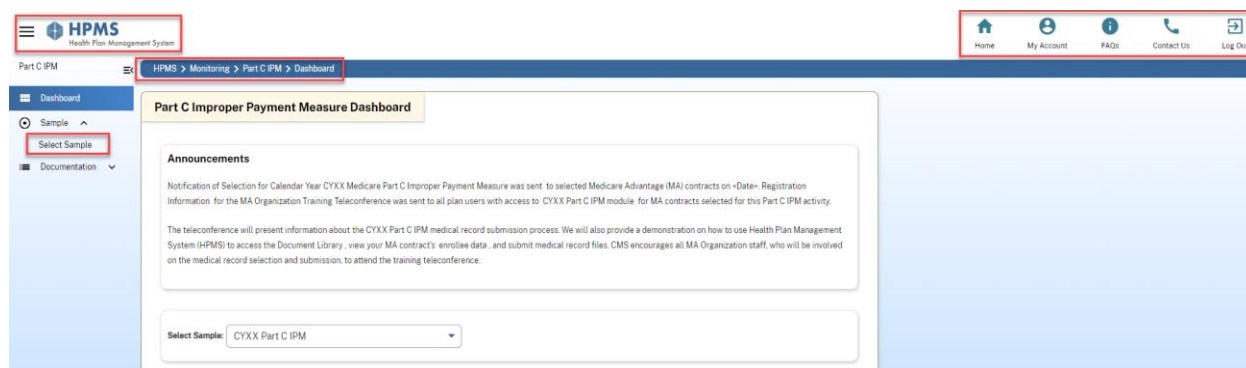- **My Account:** View and manage HPMS user account information.
- **FAQs:** View frequently asked questions related to HPMS.
- **Contact Us:** Contact the HPMS Help Desk.
- **Log Out:** Log out of HPMS.

Each page within HPMS also contains breadcrumb links, which can be found directly below the top navigation icons. Selecting a breadcrumb link returns you directly to the corresponding page.

➢ *Note: To prevent data loss, avoid using the back button on your browser. Instead, use the navigational toolbars/menus or breadcrumb links on each page to navigate within HPMS and the Part C IPM module.*

Navigating Part C IPM

Within the Part C IPM module, a collapsible module navigation menu is available on the left side of each page (Figure 3).

The Part C IPM Module Navigation Menu offers the following options:

- **Dashboard:** Access the Part C IPM Dashboard.

7

- **Sample:** Select and access existing samples. The samples available are based on your assigned access level and associated contract(s).
- **Documentation:** View or download the System User Guide.

3.   Part C IPM Start Page

From the Part C IPM start page, you can access the module navigation menu and the Part C IPM Dashboard.
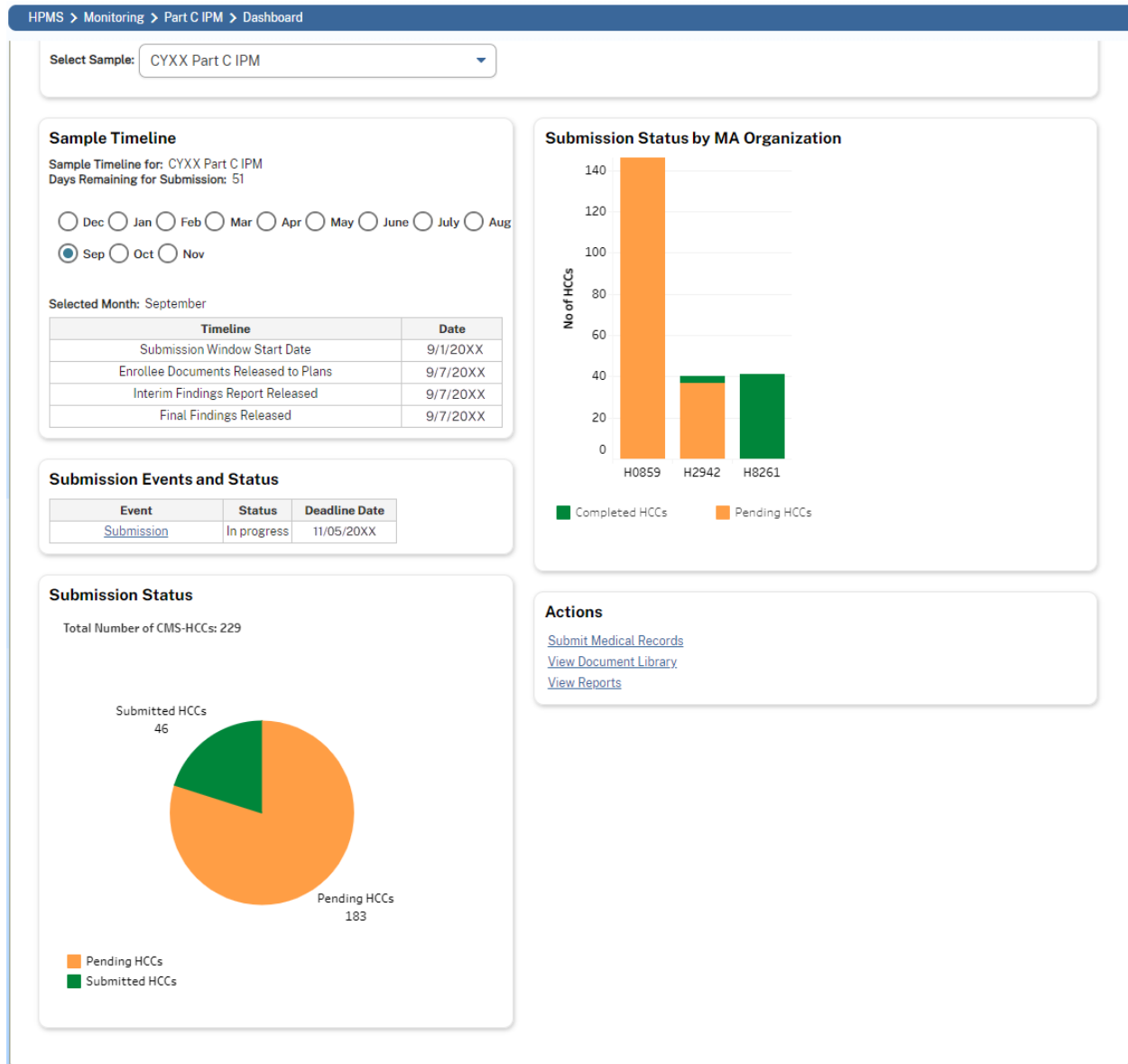
Dashboard

The Part C IPM Dashboard ([Figure 4](#)) displays key information related to the Part C IPM audit such as announcements, timelines, and submission status. Based on your contract access, the dashboard will also display widgets to represent the submission status of your MA Organization.

Dashboard features include:

- **Announcements:** Displays any active announcements pertaining to the Part C IPM module.
- **Select Sample:** Choose which sample is displayed on the dashboard.
- **Sample Timeline:** Displays major monthly milestones for a selected sample. (E.g. Submission Start Date, Submission Deadline Date, Final Findings Report, release dates, etc.)
- **Submission Events and Status:** Displays the submission window dates and status.
- **Submission Status:** Displays the submission status of the sampled enrollee CMS-HCCs, including:
  - Total number of V22Y17 plus V24 CMS-HCCs for the user's assigned MA contracts.
  - Total number of V22Y17 plus V24 CMS-HCCs submitted.
  - Total number of V22Y17 plus V24 CMS-HCCs pending submission.
- **Submission Status by MA Organization:** Displays the submission status of the sampled contracts for your organization. This includes the total number of CMS-HCCs submitted and pending per contract.

- **Actions:** Provides links to the Submission, Document Library, and Reports tabs (if applicable for the current sample).

Figure 4 – Part C IPM Dashboard

HPMS > Monitoring > Part C IPM > Dashboard

Select Sample: CYXX Part C IPM

Sample Timeline

Sample Timeline for: CYXX Part C IPM
Days Remaining for Submission: 51

Dec ○ Jan ○ Feb ○ Mar ○ Apr ○ May ○ June ○ July ○ Aug ○
● Sep ○ Oct ○ Nov

Selected Month: September

Timeline	Date
Submission Window Start Date	9/1/20XX
Enrollee Documents Released to Plans	9/7/20XX
Interim Findings Report Released	9/7/20XX
Final Findings Released	9/7/20XX

Submission Events and Status

Event	Status	Deadline Date
Submission	In progress	11/05/20XX

Submission Status

Total Number of CMS-HCCs: 229

Submitted HCCs 46
Pending HCCs 183

Pending HCCs
Submitted HCCs

Submission Status by MA Organization

No of HCCs

H0859 H2942 H8261

Completed HCCs   Pending HCCs

Actions

Submit Medical Records
View Document Library
View Reports

Select Sample

The Select Sample tool ([Figure 5](#)) provides the ability to select and access available Part C IPM samples. Only samples for which your MA Contract(s) is selected will be displayed.

Figure 5 – Select Sample
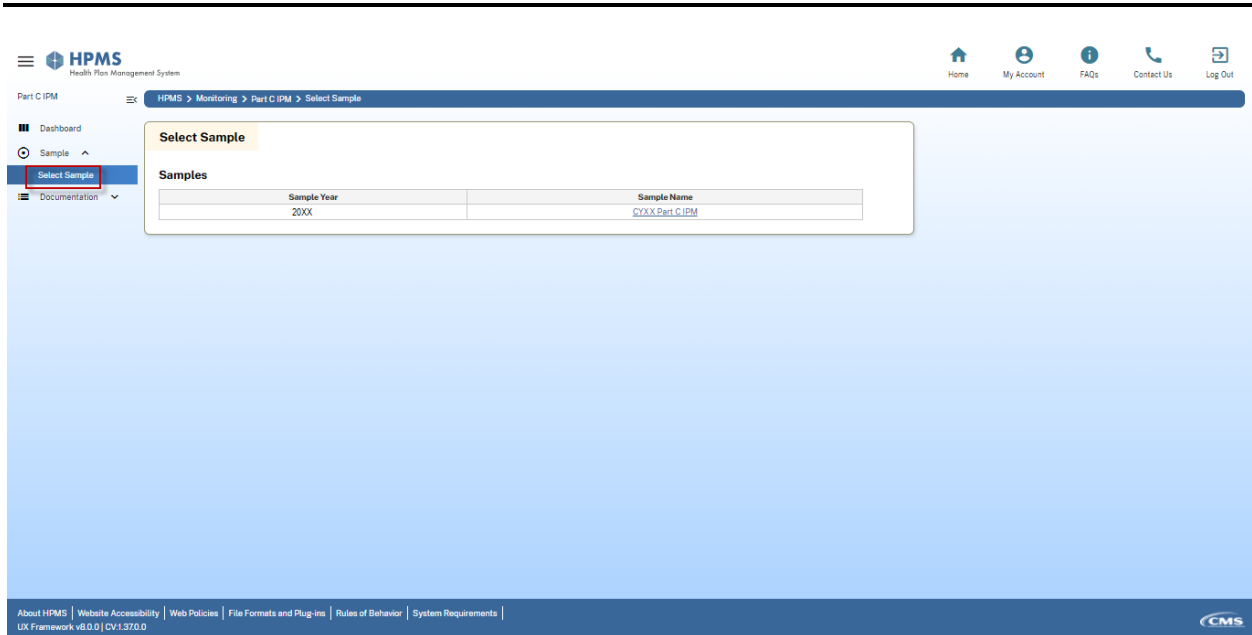
To select a sample:

1. In the Part C IPM start page, choose **Sample** > **Select Sample** from the left-side navigation menu. A list of available samples will be displayed.
2. Choose the applicable **Sample Name** link to access and view the selected sample.

> ➤ **Note:** *Only one sample can be active at a time. Older samples may be displayed for reference purposes only.*

4. Sample Tabs

After selecting a sample, you'll have access to a variety of information related to the audit; this information is organized throughout multiple sample tabs.

To view or update information related to the Part C IPM activity for the selected sample, choose one of the tabs outlined below.

Overview Tab

The Overview tab (Figure 6) provides a high-level summary of the selected sample and includes:

- **Sample Details:** Displays the sample year and name.
- **Sample Schedule:** Displays the submission start date and deadline date. Any extensions to the submission deadline will also appear here.
- **Submission Status:** Displays the status of submissions made for the sampled contracts. This includes the total number of enrollee CMS-HCCs (V22Y17 plus V24 CMS-HCCs) for the user's assigned contracts, submissions made, and pending submissions.
- **Sample Contracts:** Displays a list of the contracts selected for the sample.

Figure 6 – Overview Tab

Submission Tab & Process

The Submission tab allows users with *Part C IPM Submission – Plan* access to upload medical records and substantiate CMS-HCCs during the open submission window. This tab is only accessible once the submission window has opened.

Submission Tab - Contract and Enrollee Selection

After selecting the Submission tab, you'll land on the Contract and Enrollee Selection page (Figure 7), where you can view the enrollees for each applicable contract and select an enrollee to submit medical records for.

Additionally, you can also view an Excel report of all contracts, enrollees, and CMS-HCCs selected for this Part C IPM activity by clicking the **Complete Enrollee – HCC Report [XLSX]** link. To view the status of completed submissions, click the **Submission Status Report [XLSX]** link. The Submission Status Report also indicates whether the submission includes a medical record (*MR*) and attestation (*MR+ATT*).

Figure 7 – Submission Tab – Contract and Enrollee Selection

To view a contract and select an enrollee:

1. Select a Contract ID from the 'Contract' dropdown (Figure 8).

Figure 8 – Submission Tab – Contract and Enrollee Selection: Select Contract

2. Click the **View Enrollees** button to view the enrollee listing table ([Figure 9]). This table includes the following columns:

- **Action:** Displays a **Select** link to view the Enrollee Dashboard for the selected enrollee.
- **Enrollee ID:** Displays the enrollee's Part C IPM Enrollee ID.
- **Enrollee Name:** Displays the enrollee's last name and first name.
- **Total Number of CMS-HCC(s):** Displays the total number of V22Y17 plus V24 CMS-HCCs for the enrollee in the sample.
- **Total Number of CMS-HCC(s) Pending:** Displays the number of V22Y17 plus V24 CMS-HCCs for which no submissions have been made.
- **Validity Issues with Any Submission (Yes / No):** Displays 'Yes' if any of the submissions have been determined to be invalid; displays 'No' if no submissions have been determined to be invalid.

➢ *Note: If any submission has been deleted due to a PHI/PII policy violation (e.g., the submission included information for another individual not in the sample), the 'Validity Issues with Any Submission' column will display a '1' as a superscript. This indicates that the submission was flagged as a PHI/PII breach*

and was deleted. In this case, only the coversheet data will be available to view. The Plan will be notified if this occurs.

Figure 9 – Submission Tab – Contract and Enrollee Selection: Enrollee Listing

3. Under the 'Action' column of the enrollee listing table, click the **Select** link for the enrollee to select the enrollee, view the Enrollee Dashboard, and submit medical records.

Submission Tab - Enrollee Dashboard

Once an enrollee is selected, the Enrollee Dashboard page will appear. The Enrollee Dashboard (Figure 10) provides details on the sampled enrollee as well as the ability to view any completed submissions and submit new medical records.

Figure 10 – Submission – Enrollee Dashboard

The Enrollee Dashboard contains the following sections:

- **Sample Details:** Displays the sample year and name.
- **Contract Information**: Displays the Contract Name, Current Contract ID, and Sample Year Contract ID.

- **Enrollee Information:** Displays the Enrollee ID, MBI, DOB, last name, and first name for the selected enrollee.
- **CMS-HCC list:** Displays a table listing of all sampled V22Y17 plus V24 CMS-HCCs for the enrollee. Includes a 'Submitted (Yes/No)' column to indicate whether the CMS-HCC has a submission made, and a 'Submission Count' column indicating the count of submissions for each HCC.
- **Total Number of CMS-HCC(s):** Displays the total number of V22Y17 plus V24 CMS-HCCs for the enrollee.
- **Total Number of CMS-HCC(s) Pending:** Displays the total number of V22Y17 plus V24 CMS-HCCs pending submission for the enrollee.
- **Completed Submissions:** Displays a table listing of any submissions made for the enrollee. Includes the following columns:
  - **V22Y17/V24 CMS-HCC(s):** Displays the total V22Y17 and V24 CMS-HCCs for the submission.
  - **Submission Date:** Displays the date the submission was made.
  - **Coversheet ID:** Displays the Coversheet ID generated for the submission.
  - **Documents Submitted:** Indicates whether any documents were included with the submission:
    - *MR* indicates a submission with Medical Record attached.
    - *MR+ATT* indicates a submission with Medical Record and Attestation attached.
    - *No MR* indicates a submission with no Medical Record or Attestation attached.
  - **Submitted File:** Displays a link to view the submitted file along with the prepended Coversheet. For *No MR* submissions, no link will be displayed. If a file has been deleted due to a PHI/PII breach, a link to view only the Coversheet data will be displayed.
  - **Submitted By:** Displays the name of the user who created the submission.
  - **Submission Valid (Yes/No):** Indicates whether a submission has been determined to be Valid or Invalid.
    - If the submission is valid, the column will display 'Yes'.
    - If the submission is invalid, the column will display 'No' as a hyperlink. (See below.)
    - If the submission is under review, the column will be blank.

- If the submission is a *No MR* submission, column will display 'N/A'.
- If the submission was deleted due to PHI/PII policy violation, the column will display a superscript '1'. This indicates the submission has been flagged as a PHI/PII breach and was deleted. In this scenario, only the Coversheet data will be available to view.

Reviewing Invalid Submissions

If a completed submission has been determined to be invalid, the 'Submission Valid (Yes/No)' column in the 'Completed Submissions' table will display 'No' as a hyperlink. Selecting the hyperlink opens the Submission INV Failure & Attestation Invalid Reasons window (Figure 11) which displays the reasons for the invalid determination.

Figure 11 – Submission INV Failure & Attestation Reasons Window

The Submission INV Failure & Attestation Invalid Reasons window includes the following details:

- **Coversheet ID:** Displays the Coversheet ID for the Invalid submission.
- **V22Y17/V24 CMS-HCC(s):** Displays the CMS-HCC(s) selected for the Invalid submission.
- **INV Failure Reason(s):** Displays the failure reason(s) identified.

- **INV Subcategories**: Displays the Subcategory reason for each INV Failure Reason.
- **Attestation Invalid Reason(s):** Displays the Attestation Invalid Reasons if the MR includes an attestation identified as Invalid. If no attestation is attached, the 'Attestation Invalid Reason(s)' column will be blank and only the associated 'INV Failure Reason(s)' column will be populated.

➢ *Note: You may also view a consolidated list of submission invalid reasons for all invalid submissions for the enrollee by clicking the All Submission Failure Reasons hyperlink. Found directly above the 'Completed Submissions' table, this link only appears if at least one of the completed submissions for the selected enrollee has been determined to be invalid.*

Using the Enrollee Dashboard

Several options are available from the Enrollee Dashboard:

- To select a different enrollee, click the **Select Different Enrollee** button to return to the 'Contract and Enrollee Selection' page.
- To open a PDF file of the Coversheet and Medical Record of an enrollee, click the link in the 'Submitted File' column of the 'Completed Submissions' table.
  - For submissions where no medical record file is attached, *N/A* will display in this column.
  - If a Medical Record has been deleted due to a PHI/PII breach, click **View Coversheet (MR Deleted)** to view the Coversheet details in a new window.
- To continue with the submission process, click the **New Submission for Enrollee** button to open the Submission – Submit Coversheet page for the enrollee.

Submission Tab – Submit Coversheet

The Submission – Submit Coversheet page (Figure 12) allows you to submit a coversheet with a Medical Record (*MR*), a Medical Record with Attestation *(MR+ATT)*, or no Medical Record documents (*No MR*) for the designated enrollee CMS-HCC(s). The system will only allow PDF files to be uploaded.

Upon completing a submission, the system-generated coversheet is prepended to the submitted medical record file.

The Submission – Submit Coversheet page includes the following sections:

- **Sample Details:** Displays the sample year and name.
- **Contract Information:** Displays the Contract Name, Current Contract ID, and Sample Year Contract ID for the selected enrollee.
- **Enrollee Information:** Displays the Enrollee ID, MBI, DOB, last name, and first name for the selected enrollee.
- **Designated CMS-HCCs:** Displays a table with one row for each V22Y17/V24 CMS-HCC sampled for the enrollee. Columns include:

  - **V22Y17 CMS-HCC:** Lists the V22Y17 CMS-HCCs designated for the enrollee.
  - **V24 CMS-HCC:** Lists the V24 CMS-HCCs designated for the enrollee.
  - **Hierarchy:** Indicates the hierarchy of the CMS-HCC.
  - **V22Y17 ICD Codes:** Lists the V22Y17 ICD codes designated for the enrollee.
  - **V24 ICD Codes:** Lists the V24 ICD codes designated for the enrollee
  - **Submission Count:** Displays current submission count.

Figure 12 – Submission Tab – Submit Coversheet

When no Medical Record is available for a HCC submission, submit a Coversheet with no Medical Record attached (*No MR*):

1. In the 'Designated CMS-HCC' table, check the box(s) for V22Y17 and V24 CMS-HCC applicable to this submission. You may designate multiple V22Y17 and V24 CMS-HCCs for a single Coversheet.
2. Under 'Document to be Attached', select **No document will be attached for selected CMS-HCC(s)**. The **Submit** button will be displayed upon selection.
3. Click the **Submit** button to submit the Coversheet and return to the Enrollee Dashboard.
4. Submitted documents can be viewed from the 'Completed Submissions' table in the Enrollee Dashboard. The system-generated Coversheet (Figure 14) is prepended to the submitted medical record.

To submit a Coversheet with a Medical Record (*MR*) or a Medical Record with Attestation (*MR + ATT*) attached:

1. In the 'Designated CMS-HCC' table, check the box(s) for each V22Y17 and V24 CMS-HCC(s) applicable to this submission.

   ➢ ***Note:*** *For enrollees with multiple V22Y17 and/or V24 CMS-HCCs, you may have a Medical Record that validates more than one CMS-HCC. In this instance, one Coversheet can and should be used to validate multiple CMS-HCCs. When completing the Coversheet, please select all applicable CMS-HCCs and submit the Medical Record **once**. Please do not submit the Medical Record separately for each CMS-HCC.*

2. Under 'Document to be Attached', select **Submit document for selected CMS-HCC(s)**. Additional fields to complete the submission of a medical record will appear ([Figure 13](#)).

Figure 13 – Submission Tab – Coversheet (with Documents to Attach)

3. Review the data in the 'Pre-populated' column of the 'Enrollee Information' table and correct if needed.

➢ **Note:** *This table contains pre-populated data from Enrollment Data Base (EDB) / Medicare Beneficiary Database (MBD). If any of the enrollee demographic information on the medical record documentation differs from*

that supplied in the pre-populated column, please enter corrections in the 'Corrected' column.

4. Under 'Document Type', select either **One Physician / Specialist / Hospital Outpatient / Observation Record** or **One Hospital Inpatient Record**.

   - For **One Physician / Specialist / Hospital Outpatient / Observation Record**:
     a. Enter the 'Date of Service' in MM/DD/YYYY format or use the calendar widget to select the date. The Date of Service year must fall within the data collection year.
     b. Select **Yes** or **No** as applicable for the question 'Document includes attestation?'

   - For **One Hospital Inpatient Record**:
     a. Enter the 'Admission Date' in MM/DD/YYYY format or use the calendar widget to select the date.
     b. Enter the 'Discharge Date' in MM/DD/YYYY format or use the calendar widget to select the date. The Discharge Date year must fall within the data collection year.

5. Under 'Attach Document', click **Choose File** to select a file to upload. The file must meet the following criteria:
   - ✓ Must be a PDF File
   - ✓ File name must be less than 100 characters
   - ✓ File size must be less than 50 MB
   - ✓ File must not be password protected
   - ✓ File must not have bookmarks or binders
   - ✓ File must not be locked for editing
   - ✓ File must not be encrypted

6. Click **Submit** to complete the submission and return to the Enrollee Dashboard.

7. Submitted documents can be viewed from the 'Completed Submissions' table in the Enrollee Dashboard. The system-generated Coversheet (Figure 14) is prepended to the submitted medical record.

Figure 14 – Coversheet PDF

Document Library Tab

The Document Library tab ([Figure 15](#)) allows you to view documents related to the Part C IPM process, such as:

- ***General Sample Documentation – Reference and Training Documentation:*** *Documents like Submission Instructions, MAO Training Slides, MR Guidance, CMS Generated Attestation Instructions, Reference Materials CMS-HCCs and Physician Specialties, Enrollee List Data*

Dictionary, IFR and FFR MAO Training Slides are avaliable under this category. These documents are made available in the Document Library prior to opening of the Submission Window.

- ***Contract-Specific and Enrollee-Specific Data and Documentation:*** *Documents like Hospital Letter, Physician Letter, Enrollee List, CMS Generated Attestations are available under this category. These documents are made available in the Document Library once the Submission Window opens.*

- ***Interim Findings Report:*** *Interim Findings Reports are available under this category as the sample progresses once they are published to the Document Library.*

- ***Final Findings Report:*** *Final Findings Reports are available under this category towards the end of the sample once they are published to the Document Library.*

- ***CEO/MCO File:*** *Documents specific to CEO/MCOs are available under this category. These documents are made available in the Document Library once the Submission Window opens.*

Documents appear in the Document Library as they become available; note that some of the aforementioned documents will not be available until after the submission window opens, or after all review/CMS analysis is complete.

Available documents will be displayed in the 'Filter Results' table at the bottom of the Document Library tab. By default, documents are sorted by date uploaded, beginning with the most recent. Documents can also be filtered by document type and contract ID(s).

Figure 15 – Document Library Tab

To filter available documents:

1. Choose the desired filter parameters in the 'Filter Criteria' section.
    *   To search by document type, select the applicable option from the 'Document Type' selection box. To select multiple document types, hold the **Ctrl** key and select the desired document types. To view all documents for the sample, choose **Select All**.

- To search by Contract ID(s), select the applicable option from the 'Contract ID(s)' selection box. To select multiple contracts, hold the **Ctrl** key and select the desired contracts. To view all contracts for the sample, choose **Select All**.

2. Click the **Filter** button to apply the selected parameters. The 'Filter Results' table will be updated based on the parameters submitted.

Reports Tab

The Reports tab ([Figure 16](#)) allows users with *Part C IPM Reports – Plan* access to view various reports related to Part C IPM activity, such as:

- Complete Enrollee-HCC Report
- Contract Submitter Summary Report
- Email History Report

Figure 16 – Reports Tab
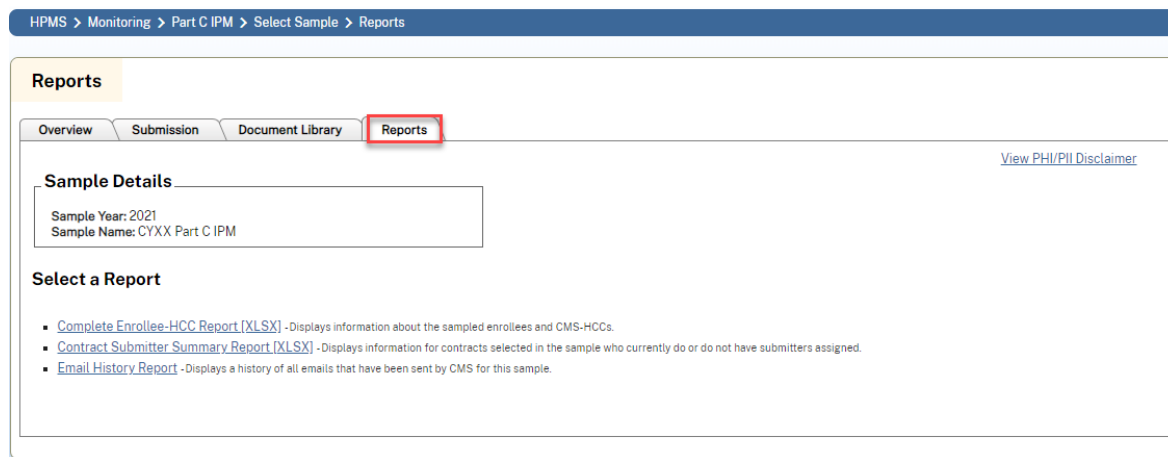
Complete Enrollee-HCC Report

The *Complete Enrollee-HCC Report* ([Figure 17](#)) is an auto-generated Excel report which displays all sampled enrollees and V22Y17/V24 CMS-HCCs selected for the Part C IPM audit. This report will only display information for contracts to which the requesting user has access.

Figure 17 – Complete Enrollee-HCC Report

MBI	Enrollee ID	First Name	Last Name	Middle Name	Sex	DOB	V22Y17 CMS-HCCs	V24 CMS-HCCs	Hierarchy	V22_DX1	V22_DX2	V22_DX3	V22_DX4	V22_DX5
Complete Enrollee-HCC Report														
Sample Year: 2021														
Sample Name: CYXX Part C IPM														
Last Generated: 8/22/2022 3:35:22 PM														
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC40	HCC40	No	M069				
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC48	HCC48	Yes	D689				
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC55	HCC55	Yes	F1120				
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC111	HCC111	Yes	J439				
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC18	HCC18	Yes	E1140	E1142	E1151	E1159	E1165
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC108	HCC108	Yes	E1151				
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC79	HCC79	No	R569				
1MR4CJ9KR65	269037_18	John	Doe	L	M	11/27/1960	HCC58	HCC59	Yes	F331				
1YU5UT2YW61	329327_95	Jane	Doe	K	F	11/13/1922	HCC108	HCC108	Yes	I739				
1YU5UT2YW61	329327_95	Jane	Doe	K	F	11/13/1922	HCC85	HCC85	No	I110	I130	I509		
1YU5UT2YW61	329327_95	Jane	Doe	K	F	11/13/1922	HCC58	HCC59	Yes	F325				
1YU5UT2YW61	329327_95	Jane	Doe	K	F	11/13/1922	HCC21	HCC21	No	E46				

INFORMATION NOT RELEASABLE TO THE PUBLIC UNLESS AUTHORIZED BY LAW:
This information has not been publicly disclosed and may be privileged and confidential. It is for internal government use only and must not be disseminated, distributed, or copied to persons not authorized to receive the information. Unauthorized disclosure may result in prosecution to the full extent of the law.

To view the Complete Enrollee-HCC Report:

- From the Reports tab, click the **Complete Enrollee-HCC Report** link. The report will open in an Excel file.

Contract Submitter Summary Report

The *Contract Submitter Summary Report* ([Figure 18](#)) is a downloadable Excel report which displays a listing of all users associated with the sample who are able to make a submission. This report will display information only for contracts to which the user has access.

Figure 18 - Contract Submitter Summary Report

Contract ID	Name	Profile	Phone Number	Email Address	Organization	Parent Organization
Contract Submitter Summary Report						
Sample Year: 20XX						
Sample Name: CYXX Part C IPM						
Last Generated: 9/24/2021 2:31:55 PM						
H0859	Doe John	MCO User, PACE MCO User	555-555-5551	jdoe@company.com	A Company, Inc.	B Company, Inc.
H2942	Doe Jane	MCO User	555-555-5552	jdoe@company.com	A Company, Inc.	B Company, Inc.
H8261	Public John	MCO User, PACE MCO User	555-555-5553	jpublic@company.com	A Company, Inc.	B Company, Inc.

INFORMATION NOT RELEASABLE TO THE PUBLIC UNLESS AUTHORIZED BY LAW:
This information has not been publicly disclosed and may be privileged and confidential. It is for internal government use only and must not be disseminated, distributed, or copied to persons not authorized to receive the information. Unauthorized disclosure may result in prosecution to the full extent of the law.

To view the *Contract Submitter Summary Report*, go to the Reports tab and click the **Contract Submitter Summary Report** link. The report will download as an Excel file and includes contact information for all submitter users associated with the sample.

Email History Report

The *Email History Report* is an auto-generated summary of any emails sent by CMS (or designated CMS Contractor) to your MA Organization. This report will only display information for contracts to which the requesting user has access.

To generate and view an Email History Report:

1. From the 'Reports' tab, click the **Email History Report** link. The Email History Report parameters section will appear ([Figure 19](#)).

Figure 19 – Set Email History Report Parameters

2. In the 'Email Type' selection box, select the appropriate email type(s) to include in the auto-generated report. To select multiple email types, hold the **Ctrl** key and select the applicable types.

3. In the 'Contract ID' selection box, select the appropriate contract to include in the generated report. To select multiple contracts, hold the **Ctrl** key and select the appropriate contracts. To include all contracts for the sample, choose the **Select All** option.

4. Click the **Search** button to view the auto-generated report (Figure 20).

Figure 20 – Email History Report

Navigating the Email History Report

- To make any changes to the report parameters, click the **Modify** button.
- To export all results as an Excel file, click the **Export All to Excel** link found above the 'Search Results' table.
- To view details of an individual email, click the **View Email** link in the 'Email Details' column of the 'Search Results' table. Details for the selected email will open in a separate (Figure 21) window and include links to email attachments (if any).

Figure 21 – Email Detail Window

5.   HPMS Contact Information

Important: Do not send any beneficiary Protected Health Information (PHI) or Personally Identifiable Information (PII) to any CMS mailbox.

Contact	Phone Number / Email	Notes
HPMS User Access	hpms_access@cms.hhs.gov	Assistance with HPMS user access needs such as access troubleshooting, password resets, or new account status.
HPMS Help Desk	1-800-220-2028 hpms@cms.hhs.gov	Assistance with all other HPMS needs not related to user access.
Part C IPM (CMS)	PartC_IPM@cms.hhs.gov	Assistance with needs specific to the Part C IPM module.