

Part D Payment Process Support Web Portal

USER GUIDE

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1 Introduction

In support of the Medicare Prescription Drug Benefit program, the Centers for Medicare & Medicaid Services (CMS) has designated Acumen as the Reconciliation Support Contractor for the final Part D payment process. This role requires Acumen to coordinate various aspects of the Part D payment reconciliation process.

To help Medicare Part D sponsors, CMS, and Acumen exchange and discuss confidential project¹ information, Acumen has implemented a secure Web Portal using its existing, Federal Information Security Management Act (FISMA)-compliant Portal infrastructure and software. The Portal is located at:

https://PartD.ProgramInfo.US/PaymentSupport

Using this Portal, you can:

- submit and view the status of reopening requests for Part D Payment services;
- track the status of topics related to Acumen support services;
- download and upload confidential project documents;
- download general reference documents related to the project, including the reopening request spreadsheet; and
- discuss project-related matters with Acumen, CMS, and/or other project participants online.

1.1 About the User Guide

This *User Guide* contains comprehensive instructions for logging in to, using, and logging out of the Part D Payment Process Support ("Payment Support") Web Portal². It consists of the following 10 sections.

¹ In the context of this *User Guide*, "project" denotes the tasks, discussions, and documentation undertaken in accordance with the Part D Payment Support contract.

² For high-level web Portal instructions, consult the *Getting Started Guide*.



Table 1. User Guide Sections

SECTION TITLE	CONTENTS
<u>1 Introduction</u>	Understanding the Web Portal's design, including its layout and access requirements.
2 Account Configuration	Configuring your Web Portal account.
<u>3 Login</u>	Logging in to the Web Portal.
4 Announcements	Accessing Home page announcements.
<u>5 Upload Data</u>	 Uploading reopening requests for payments; and Tracking the status of a submitted reopening request.
<u>6 Discussions</u>	 Accessing project-related topics; Creating a new topic; Downloading and uploading confidential topic files; and Discussing topic-related matters with Acumen, CMS, and/or other project participants online.
7 Documentation	Downloading general reference documents related to the Payment Support project.
8 User Settings	Configuring your user settings.
<u>9 Logout</u>	Logging out of the Web Portal.
<u>10 Forgot Username and Forgot</u> <u>Password</u>	Reacquiring your username and resetting your password.

1.2 About the Web Portal's Structure

The Payment Support Web Portal has four main components or "panes": Header, Navigation, Information, and Footer.



Figure 1. Web Portal Structure

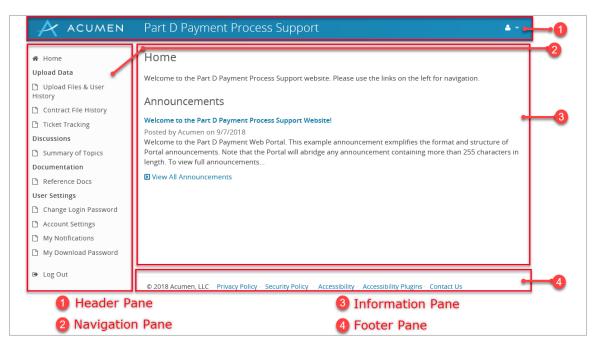


Table 2. Web Portal Pane Overview

PANE	DESCRIPTION
Footer	Contains links to Acumen's security and privacy policies, accessibility information, accessibility plugins, and contact information for Project Assistance (<u>PartDPaymentSupport@AcumenLLC.com</u>).
	For technical Portal assistance, contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).
Header	Contains the Acumen logo, a drop-down menu with links to available Portals, and a drop-down menu with user information and a Log Out link.
Information	Displays page contents.
Navigation	Contains links to Web Portal pages.

For more information on these panes, refer to Appendix A Web Portal Panes.



1.3 Access Requirements

To access the secure Web Portal, you must have the following:

- Web Portal username
- Web Portal password

If you encounter any credential issues, contact Website Support at <u>WebAssistance@AcumenLLC.com</u>.

1.4 Session Timeout

For security purposes, the Web Portal automatically logs you out after 15 minutes of inactivity.

Note that activity does NOT include entering data into a data-entry field (such as a discussion post text field) or transferring (uploading or downloading) files. As such, if you are in the process of performing either of these activities at the time of a session timeout, the Payment Support Portal will NOT save or auto-complete your current activity.

To avoid losing your work, we strongly recommend drafting any data-entry text in a text software program (for example, Microsoft Word), then copying that text into the Web Portal's data-entry field(s). For file transfers, we recommend planning your transfers before executing them—factoring in the size and number of documents you want to transfer as well as your current Internet connection speed.

1.5 Banned File Types

To prevent hackers from injecting malicious code into the Payment Support Web Portal, we have banned the following file types in relation to the Portal:

- HTML files (.htm and .html)
- ASP.NET source files (.aspx)

If you have any questions about banned file type(s), please contact Website Support at <u>WebAssistance@AcumenLLC.com</u>.



2 Account Configuration

To set up your user account, you must complete the following seven steps in order:

- 1 Configure your web browser settings.
- 2 Access the Account Management Web Portal.
- 3 Create a new password.
- 4 Log in to the Account Management Web Portal.
- 5 Agree to Acumen's Security Policy.
- 6 Verify your identity through phone verification.
- 7 Establish three security questions and answers.

Sections 2.1 - 2.7 provide detailed instructions for completing each of these seven steps.

Note that we recommend using Internet Explorer (IE) 11.0 or higher to access and use the Portal.

2.1 Configuring Your Browser Settings

Before you can access the Web Portal, you must first ensure that your browser is configured to support the Portal's secure communication protocols.

To do so:

1 Work with your system administrator to ensure that your browser has Transport Layer Security (TLS) 1.1 and/or 1.2 enabled.[ER1]

2.2 Initially Accessing the Account Management Web Portal

To access the Account Management Web Portal for account configuration:

1 In your user account credentials email, click the URL labeled as a "One-Time Password Link."

The Create Password page loads.



Figure 2. Create Password Page

ACUMEN	Account Management
	Create Password Enter your username to verify your account. All fields marked with * are required. Username * Next

2.3 Creating Your New Password

To create a new password:

- 1 In the "Username" field, enter your username.
- 2 Click the **Next** button.

The New Password tool loads.

Figure 3. Create Password Page – New Password Tool

ACUMEN	Account Management
	Create Password
	 Set your new password. All fields marked with * are required. Your new password must meet the following complexity requirements: Be at least eight characters long. Use three of the following four character sets: Lower case (a - z) Upper case (A - Z) Numbers (0 - 9) Special characters (!@#\$%^&*()_+=) Be different than your last 24 passwords. Not contain your email address, username, or full name.
	Password * Confirm Password * Submit



- 1 In the "Password" field, enter a password that meets the following criteria:
 - a. Is at least 8 characters long.
 - b. Contains the following four character sets:
 - i. Lowercase letters (a-z)
 - ii. Uppercase letters (A-Z)
 - iii. Numbers (0-9)
 - iv. Symbols (! @ # \$ % ^ & * () _ + =)
 - c. Is different from your last 24 passwords.
 - d. Has not changed within the last 24 hours.
 - e. Does not contain your email address, username, or full name.
- 2 In the "Confirm Password" field, re-enter the password you just created.
- 3 Click the **Submit** button.

The Password Created message loads.

NOTE: After establishing a new password, you must not share it with anyone else.

Figure 4. Password Created Message

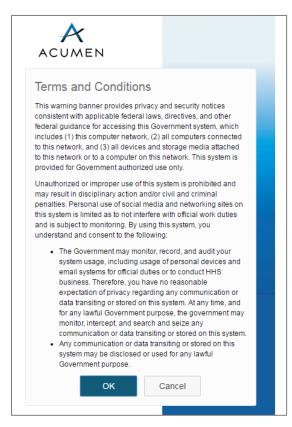
ACUMEN	Account Management
	Create Password
	Your login password has been created successfully.
	Continue

4 Click the **Continue** button.

The Terms and Conditions page loads.



Figure 5. Terms and Conditions



2.4 Logging In to the Account Management Web Portal

Before accessing the Payment Support Web Portal, you must complete account configuration in the Account Management Web Portal.

To log in to the Account Management Web Portal:

- 1 Read the Terms and Conditions, then click the **OK** button.
 - **NOTE:** If you do not consent to the Terms and Conditions notice, you can click the **Cancel** button; however, doing so will prevent you from accessing the Web Portal.

The Login page loads.



ACUME	ĨN	
Username: Password:	Login	
© 2018 Acumen, L	LC. All rights reserved	Forgot Username? Forgot Password?

Figure 6. Login Page

- WARNING: If you inadvertently load an incorrect URL and access a Web Portal with a login page similar to—but different from—the Portal's Login page, do NOT enter your user credentials. Instead, contact Website Support (WebAssistance@AcumenLLC.com) immediately.
- 2 In the "Username:" and "Password:" fields, enter your username and login password.
- 3 Click the Log On button.

The Security Agreement page loads



Figure 7. Security Agreement Page

ACUMEN	Account Management A
	Security Agreement
	To access this website, you must read and agree to the Acumen Security Policy.
	Note: After agreeing to the Policy, you will be required to confirm your agreement on at least an annual basis, and whenever the Policy changes.
	Click Yes if you agree to abide by the terms of the Acumen Security Policy.
	Yes No

2.5 Agreeing to the Security Policy

As part of the account configuration process, you must read and agree to Acumen's Security *Policy*, which defines the terms of use for the Web Portal.

To do so:

1 In the Security Agreement page, click the Acumen Security Policy link.

The Security Policy page loads.

- 2 Read the Security Policy.
 - **WARNING:** As an authorized Web Portal user, you are responsible for protecting any confidential data published in or downloaded from the Portal.
- 3 Click the Yes button.

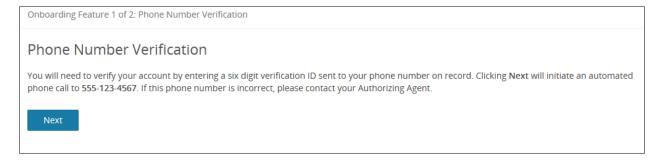
Clicking the **Yes** button is an indication of your agreement to abide by all terms and conditions defined in the *Policy*.

NOTE: After agreeing to Acumen's Security Policy, you will be required to renew your agreement on an annual basis and whenever Acumen modifies *Policy* terms.

The Phone Number Verification page loads.



Figure 8. Phone Number Verification Page



2.6 Phone Number Verification

As part of the account configuration process, you must verify your identity through a phone number verification system.

To complete the phone number verification process:

1 In the Phone Number Verification page (refer to Figure 8), read the listed phone number and ensure that it is correct.

NOTE: If the phone number is incorrect, contact your authorizing agent³.

2 Click the Next button.

The Phone Number Verification Input page loads.

Figure 9. Phone Number Verification – Input Page

Onboarding Feature 1 of 2: Phone Number Verification
Phone Number Verification
A phone call will be placed to (555) 123-4567 shortly. Please follow the prompt and enter the six digit verification ID provided. All fields marked with * are required.
Verification ID: *
Cancel Submit

³ For information on your authorizing agent, refer to the Glossary or contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).



- 3 Answer the automated phone call you receive at the number listed on the Phone Number Verification page.
- 4 In the "Verification ID:" field, enter the number spoken on the automated phone call.
- 5 Click the **Submit** button.

The Security Questions page loads.

Figure 10. Security Questions Page

Onboarding Featu	re 2 of 2: Security Questions
Security Qu	lestions
Select security que to verify your iden	estions from the drop-down menus, and then provide answers in the text box below. You must correctly answer your security questions tity in the future.
All fields marked v	vith * are required.
Question 1: *	
Answer 1: *	
Question 2: *	
Answer 2: *	
Question 3: *	
Answer 3: *	
Submit	

2.7 Establishing Your Security Questions and Answers

In addition to agreeing to Acumen's Security Policy, you must establish three security questions and answers so that, in the future, you can authenticate your identity whenever you need to reset your account password or obtain account-specific assistance.

To establish your security questions and answers:

- 1 For each of the question drop-down menus, expand the menu and select a security question.
- 2 In the answer field corresponding to a selected question, enter a response.
 - **NOTE:** The Web Portal factors spaces—but not case—into its validation of your online responses to your security questions. This means that if



you were to enter the response "Jane Doe" in one of the answer fields, the Web Portal would accept "jane Doe," "Jane doe," "JANE DOE," and "jane doe" but would reject "JaneDoe."

- **WARNING:** If you forget your password or any other account-specific information, you must correctly answer at least one of your security questions to obtain assistance.
- 3 Click the Submit button.

The Account Management Home Page loads, displaying a list of the web portals you can access.

ACUMEN	Account Management			- ۵
Home Account Settings Symantec VIP Count Settings	Home Welcome to the Account Management website. Please use the links on the left for navigation. Web Portals			
Note: All times listed are in Pacific Time	Portal <site name=""></site>	URL	Details	
	Example Portal A	<web portal="" url=""></web>	Details	
	Example Portal B	<web portal="" url=""></web>	Details	
	© 2016 Acumen, LLC Privacy Policy Security Policy Accessibility Accessibility Plugins Contact Us			

Figure 11. Account Management Home Page



3 Login

After <u>you configure your account</u>, logging in to the Portal will consist of agreeing to the Web Portal's terms and conditions and entering your user credentials.

To log in to the Web Portal:

- 1 Launch a web browser.
- 2 In the browser address field, enter the Web Portal's URL:

https://PartD.ProgramInfo.US/PaymentSupport

- 3 Verify the URL in the address field matches the URL specified in step 2.
- 4 After verifying the URL, press the **Enter** key on your keyboard.

The Terms and Conditions page loads (refer to Figure 5).

5 Read the Terms and Conditions, then click the **OK** button.

NOTE: If you do not consent to the Terms and Conditions notice, you can click the **Cancel** button; however, doing so will prevent you from accessing the Web Portal.

The Login page loads (refer to Figure 6).

- **NOTE:** If you inadvertently load an incorrect URL and access a Web Portal with a login page similar to—but different from—the Portal's Login page, do NOT enter your user credentials. Instead, contact Website Support (<u>WebAssistance@AcumenLLC.com</u>) immediately.
- 6 In the "Username:" and "Password:" fields, enter your username and login password.
- 7 Click the **Log On** button.

The Home page loads.



Figure 12. Payment Support Home Page

ACUMEN	Part D Payment Process Support
 Home Upload Data Upload Files & User History Contract File History Ticket Tracking Discussions Summary of Topics Documentation Reference Docs User Settings Change Login Password Account Settings My Notifications My Download Password Log Out 	Home We come to the Part D Payment Process Support website. Please use the links on the left for navigation. Announcements We come to the Part D Payment Process Support Web Portal (Example Announcement) ! ww Posted by Acumen LLC on 11/5/2018 We come to the Part D Payment Web Portal. The example announcement exemplifies the format and structure of Portal announcements. Note that the Portal will abridge any announcements containing more than 255 characters to L.J P View All Announcements
	© 2018 Acumen, LLC Privacy Policy - Security Policy - Accessibility - Accessibility Plugins - Contact Us
NOTE:	You may be prompted to agree to the Portal's security policy before

You may be prompted to agree to the Portal's security policy before reaching the Home Page. For instructions for the security policy, refer to <u>Section 2.4 Agreeing to the Security Policy</u>.



4 Announcements

Acumen periodically posts announcements about the Payment Support project on the Home page. If an announcement contains more than 255 characters (or about 3 lines of text), the Portal will display an abridged version of it in the Home page and publish the full text in the announcement view.

To access this view:

1 In the Announcements section on the Home Page, click the announcement's hyperlinked title.

The Web Portal loads the announcement view.

Figure 13. Example Announcement View

Home / Annound	ements / Example Announcement
Announce	ements
	Close
Title	Example Announcement
Body	The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown
Expires	
	2016 6:06 PM by Acumen Testing 4/21/2016 6:06 PM by Acumen Testing

TIP: To close the announcement view, click **Home** or the **Close** button.



5 Upload Data

To report PDE/DIR overpayments and/or request a reopening of a final payment determination, users can submit a reopening request spreadsheet and supporting documentation through the Upload Files tool in the Payment Support Web Portal. Users can also track the status of a request through the Ticket Tracking tool. Sections 5.1 – 5.3 provide detailed instructions for performing these activities.

5.1 Preparing Files for Upload

There are three different types of documents that you may need to submit using the Upload Files tool in the Reopening Requests section of the Payment Support Web Portal: (1) reopening request spreadsheets⁴; (2) supporting documentation; and (3) additional information⁵. Table 3 describes each of these documents and provides submission instructions.

DOCUMENT TYPE	DESCRIPTION	SUBMISSION INSTRUCTIONS
Reopening Request Spreadsheet ⁴⁴	Spreadsheet necessary for initiating a reopening request.	Submit individually as an .xlsx file or in a .zip file with supporting documentation.
Supporting Documentation	Any documents that accompany a reopening request.	Submit in a .zip file with a reopening request spreadsheet.
		Note that the .zip file will not be accepted unless it also contains the reopening request spreadsheet.
Additional Information	Any documents submitted at a later date in response to a request from Acumen.	Submit all additional information together in one .zip file.

Table 3. Reopening Request Document Types

⁴ The reopening request spreadsheet template is located in the Portal's Reference Docs library. For instructions on downloading this template, refer to <u>Section 7.1 Downloading a File From the Reference Docs Library</u>.

⁵ For guidance on completing the reopening request spreadsheet and supporting documentation, refer to the April 6, 2018 HPMS memorandum "Reopening Process and Updates to the PDE/DIR-related Overpayment Reporting." For any further questions, contact <u>PartDPaymentSupport@AcumenLLC.com</u>.



All files must also follow the permitted naming conventions for the Upload Files tool. Otherwise, Acumen will reject your submission. Table 4 defines the naming conventions for each document type.

Note that you are only permitted to submit two types of files to the Upload Files tool: .zip and .xlsx files. All other file types must be included in a .zip file.

DOCUMENT TYPE	NAMING CONVENTION	EXAMPLE(S)
ZIP file (must contain attestation)	[Parent Org ID]_[CalendarYear]_EGWP_a ttest.zip	123_2014_EGWP_attest.zip
Attestation (must be included in ZIP file)	[Parent Org ID]_[CalendarYear]_EGWP_a ttest.pdf	123_2014_EGWP_attest.pdf
Supporting documentation (may be included in ZIP file)	[Parent Org ID]_[Calendar Year]_EGWP_attach_[File Number]	123_2014_EGWP_attach_1.pdf
Reopening Request Spreadsheet – ZIP File	[Parent Org ID]_[Calendar Year]_ReopenReq.zip	123_2011_ReopenReq.zip
Reopening Request Spreadsheet – Single File	[Parent Org ID]_[Calendar Year]_ReopenReq.xlsx	123_2011_ReopenReq.xlsx
Supporting Documentation –.pdf, .doc, .xlsx, and/or .docx File(s) accompanying a Reopening Request Spreadsheet within a ZIP file	[Parent Org ID]_[Calendar Year]_[File Number]	123_2011_1.pdf 123_2011_2.docx 123_2011_3.doc
Additional Information – ZIP File	[Parent Org ID]_[Calendar Year]_Add_[MMDDYYYY].zip	123_2011_Add_01272016.zip

Table 4. Reopening Request and Supporting Documentation Naming Conventions



DOCUMENT TYPE	NAMING CONVENTION	EXAMPLE(S)	
Additional Information – File(s) within a ZIP file	[Ticket Number]_Add_[MMDDYYYY] _FileNumber	123_T0001_2011_001_Add_ 01272016_1	
	The "FileNumber" is a number you assign to distinguish between different files within the ZIP file.		
	Your Parent Org ID or "PO ID" is determined by the Health Plan Management System (HMPS). Refer to HPMS for this information.		
TIP: Yo	You can find a request's Ticket Number on the Ticket Tracking page.		

5.2 Uploading Files Related to a Contract

To upload files related to a reopening request:

1 In the Navigation pane, click Upload Files & User History.

The Upload Files & User History page loads.

Figure 14. Upload Files & User History Page

Upload Files & User History					
Select a Submission Type and Contract Year to view files.					
On this page, you can upload files to open submission periods or view the history of uploaded files for all submission periods. To upload files, select Open Submissions from Submission Type and a Contract Year. To view the history of uploaded files, select All Submissions from Submission Type. You can also select a Contract Year or view the history for all Contract Years. Please note that all upload history that appears on this page is specific to you. Please note that uploads are restricted to contracts for which you have been granted access. To see the contracts you have access to, view the Authorized Groups section on the Account Settings page.					
Submission Type:	All Submissions	\checkmark			
Contract Year:	All		Open		

2 In the "Submission Type:" drop-down menu, select **Open Submissions**.



- 3 In the "Contract Year:" drop-down menu, select the appropriate year for the contract.
- 4 Click Open.

The Upload Files & User History page table view loads.

Upload Files & User History							
Select a Submission Type and Contract Year to view files.							
On this page, you can upload files to open submission periods or view the history of uploaded files for all submission periods. To upload files, select Open Submissions from Submission Type and a Contract Year. To view the history of uploaded files, select All Submissions from Submission Type. You can also select a Contract Year or view the history for all Contract Years. Please note that all upload history that appears on this page is specific to you. Please note that uploads are restricted to contracts for which you have been granted access. To see the contracts you have access to, view the Authorized Groups section on the Account Settings page.							
Submission Type:	All Submiss	sions	\checkmark				
Contract Year:	2015		✓ Open				
Upload							
File Name	Description	Description Process Status Description Date & Time File Size					
123_2015_RegopenReg.zip		Processing	File(s) is being processed.	11/19/2018 10:41 AM	14.15 KB		
Sample File C.xlsx	Sample Description Invalid file(s). Correct and resubmit. Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. 11/01/2018 10:09 AM 6.02 KB						
Sample File B.xlsx Invalid file(s). Correct and resubmit. Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. 11/01/2018 10:08 AM 6.02 KB							
Sample File A.xlsx Invalid file(s). Correct and resubmit. Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. 11/01/2018 10:07 AM 6.02 KB							
Displaying 1 to 4 of 4 items							

5 Click the **Upload** button.

The Upload File tool loads.



Figure 16. Upload Files & User History Page – Upload File Tool

ission Type and	Contract Year to viev	v files.			
eriods. To upload uploaded files, s ry for all Contrac hat all upload hi contracts for wh	I files, select Open Su elect All Submissions It Years. story that appears of ich you have been g n on the Account Se	ubmissions from Submission Type and a Contract Year. To view s from Submission Type. You can also select a Contract Year or on this page is specific to you. Please note that uploads are granted access. To see the contracts you have access to, view titings page.			
Γ:	2015	▶ Open			
Description	Process Status	Process Status Description	Date & Time	File Size	
Sample Description	Invalid file(s). Correct and resubmit.	Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention.	11/01/2018 10:09 AM	6.02 KB	
	Invalid file(s). Correct and resubmit.	Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention.			
	Invalid file(s). Correct and resubmit.	Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention.	11/01/2018 10:07 AM	6.02 KB	
		Displaying 1 to 3 of 3 items			
er: 2015 to upload:			Upload F Tool	ïle	
ile No file cho	sen				
file(s), the user v	erifies that the subm	itted information is accurate to the best of his or her knowledge.			
	riods. To upload uploaded files, s ry for all Contrad- hat all upload hi contracts for wh ed Groups sectio ype: r: Description Sample Description ile er: 2015 to upload: ile No file cho	riods. To upload files, select Open St uploaded files, select All Submissions ry for all Contract Years. hat all upload history that appears of contracts for which you have been g ed Groups section on the Account Se ype: All Submissions r: 2015 Description Process Status Sample Description Correct and resubmit. Invalid file(s). Correct and resubmit. Invalid file(s). Correct and resubmit. Invalid file(s). Correct and resubmit. Invalid file(s). Correct and resubmit.	Description Process Status Description Supporting documentation must be. doc. docx, pdf, or. xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. Invalid file(s). Supporting documentation must be. doc. docx, pdf, or. xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. Invalid file(s). Supporting documentation must be. doc. docx, pdf, or. xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. Invalid file(s). Supporting documentation must be. doc. docx, pdf, or xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. Description Description Invalid file(s). Supporting documentation must be. doc. docx, pdf, or xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention. Description Description Invalid file(s). Supporting to 3 of 3 items	eriods. To upload files, select Open Submission from Submission Type, You can also select a Contract Year or oy for all Contract Years. To view uploaded files, select All Submissions from Submission Type. You can also select a Contract Year or oy for all Contract Years. That all upload history that appears on this page is specific to you. Please note that uploads are contracts for which you have been granted access. To see the contracts you have access to, view drift or you see to end access. To see the contract Year or oy for all Contract Years. All Submissions from Submission Type. You can also select a Contract Year or oy for all Contract Years. The all upload history that appears on this page is specific to you. Please note that uploads are contracts for which you have been granted access. To see the contracts you have access to, view droups section on the Account Settings page. The all Submissions Type Status Status Description Process Status Description Or advs files and include a valid Reopening Request Spreadsheet. Tickets must and include a valid Reopening Request Spreadsheet. Tickets must be doc, docx, pdf, or xdsx files and include a valid Reopening Request Spreadsheet. Tickets must be doc, docx, pdf, or xdsx files and include a valid Reopening Request Spreadsheet. Tickets must be doc, docx, pdf, or xdsx files and include a valid Reopening Request Spreadsheet. Tickets must be doc, docx, pdf, or xdsx files and include a valid Reopening Request Spreadsheet. Tickets must be availed to complete and follow the naming convention. File File File File File File File File	

6 Click the **Choose File** button.

A standard file upload window appears.

7 Navigate to and select the file(s) you want to upload.



- NOTE:All uploaded files must follow the correct naming conventions. They
also must be either a .zip file or a .xlsx file. Refer to Section 5.1Preparing Files for Upload for more information.
- 8 In the file upload window, click the **Open** button.

The upload window closes, and the "Choose a file to upload:" field displays the path to the file you just selected.

- 9 In the "Description:" field, enter any notes about the file that you want to include.
- 10 At the base of the page, click the **Upload File** button.

The Portal reloads the Upload Files & User History page (refer to Figure 15), which now contains your uploaded file.

NOTE: The Upload Files table displays the status of the file upload in the "Process Status" column. A process status in red-colored text indicates a failed upload, while a process status in green-colored text indicates a successful upload.

> For a detailed explanation of upload process statuses, refer to <u>Appendix</u> <u>B Upload Process Statuses</u>.

5.3 Accessing Personal File History

The Upload Files & User History page enables users to view all successful and failed uploads from their account.

To access your personal file history:

1 In the Navigation pane, click **Upload Files & User History**.

The Upload Files & User History page loads (refer to Figure 14).

- 2 In the "Submission Type:" drop-down menu, select the submission type you would like to view.
- 3 In the "Contract Year:" drop-down menu, select the contract year you would like to view.

The Portal filters table items to those matching your criteria.

TIP:To redisplay all files, ensure that every drop-down tool displays the
ALL option, then click the **Open** button.



oload Files &	User H	istory			
ect a Submission Typ	pe and Contr	act Year to view files.			
riods. To upload files, oaded files, select All Contract Years. ease note that all upl stricted to contracts	select Open Submission I Submission	Submissions from Submission s from Submission Type. You of that appears on this page is	ew the history of uploaded files for all submission i Type and a Contract Year. To view the history of can also select a Contract Year or view the history for specific to you. Please note that uploads are s. To see the contracts you have access to, view		
bmission Type:		All Submissions			
ntract Year:	:	2015	Open		
Jpload					
Jpload File Name	Description	Process Status	Process Status Description	Date & Time	File Size
	Description	Process Status Processing	Process Status Description File(s) is being processed.	Date & Time 11/19/2018 11:56 AM	
File Name	Description				Size 108.66
File Name ample_File_D.xlsx	Description	Processing Contains contract(s) with no access. Correct and resubmit. Invalid file(s). Correct	File(s) is being processed. The workbook contains at least one contract to which you lack access. You must correct the invalid contract	11/19/2018 11:56 AM	Size 108.66 KB 108.66

Figure 17. Upload Files & User History Page - Filter Criteria

NOTE:

This table displays only your successful and failed uploads. To view all successful uploads to a contract, <u>access contract file history</u>.

5.4 Accessing Contract File History

The Contract File History page enables users to view all successful uploads to a specific contract.

To view contract file history specific to a certain contract:

1 In the Navigation pane, click **Contract File History**.

The Contract File History page loads.



Figure 18. Contract File History Page

Contract File History						
Select a Contract, Submission Type, and Contract Year to view files.						
Contract:	Sample Contract A	\checkmark				
Submission Type:	Open Submissions					
Contract Year:	All	∨ Open				

- 2 In the "Contract:" drop-down menu, select the contract you would like to view.
- 3 In the "Submission type:" drop-down menu, select the submission type you would like to view.
- 4 In the "Contract Year:" drop-down menu, select the year appropriate for the contract.
- 5 Click Open.

The Portal filters table items to those matching your criteria.

Contract File History								
Select a Contract, Submission Type, and Contract Year to view files.								
Contract:	ontract: Example Contract Type			\checkmark				
Submission Type:	Type: Open Submissions							
Contract Year:	Contract Year: 2015 Open							
Contract	File Name	Description	Process Status	Date & Time	Uploaded By	File Size 🔺		
Example Contract	Sample File A.xls	x	File(s) processed.	11/05/2018 10:34 AM	Sample User A	108.69 KB		
Example Contract	Sample File B.xls	x	File(s) processed.	11/05/2018 12:14 PM	Sample User A	108.73 KB		
Example Contract Sample File C.xlsx			File(s) processed.	11/05/2018 12:13 PM	Sample User A	108.75 KB		
Displaying 1 to 3 of 3 items								



TIP: To redisplay all files, ensure that every drop-down tool displays the ALL option, then click the **Open** button.

5.5 Ticket Tracking

The Ticket Tracking feature enables users to view any new, pending, incomplete, and complete reopening requests. Each submitted request is assigned a ticket, which can be referred to for status updates.

For a detailed explanation of ticket tracking statuses, refer to <u>Appendix C Ticket Tracking</u> <u>Statuses</u>.

Ticket Tracking On tHis page, Contracts can monitor the ticket statuses of reopening requests submitted. Refer to the Reference Docs library for more information about the Part D Payment Support Process.							
Contract:		T0002	\checkmark				
Contract Year: ALL							
Ticket Num	ber:						
Ticket Status: ALL Search							
Export to Excel							
Contract	Contract Year	Ticket Number 🔺	Ticket Status	Request Date	Discussion	Last Update	
T0002	2008	PO1_T0002_2008_001	Pending Review	08/08/2017	Start Discussion	08/08/2017	
T0002	2009	PO1_T0002_2009_001 Pending Review 08/08/2017 Start Discussion 09/21/2				09/21/2017	
Displaying 1 to 2 of 2 items							

Figure 20. Ticket Tracking Page

5.5.1 ACCESSING THE TICKET TRACKING PAGE

To access the Ticket Tracking tool:

1 In the Navigation pane, click **Ticket Tracking**.

The Ticket Tracking page loads (refer to Figure 20).



5.5.2 SEARCHING FOR ONE OR MORE TICKETS

The Ticket Tracking page contains a set of search tools for filtering the list of displayed tickets to those matching your search criteria.

To search for one or more tickets:

1 In the Navigation pane, click **Ticket Tracking**.

The Ticket Tracking page loads (refer to Figure 20).

- 2 In the Search section, locate the Search tool you want to filter tickets with.
 - **NOTE:** The Ticket Number field is a text field requiring data entry. All other Search tools are drop-down menus. When using the drop-down menus, you can either scroll through to select an option or enter the first few characters of an option to navigate to it. If you choose to enter characters, you must do so rapidly, as pausing between each character may reset your search.
- 3 Select or enter a filter option.
- 4 Repeat steps 2 and 3 for any other Search tools you want to use in your search.
- 5 Click the Search button.

The Portal filters table items to those matching your search criteria.

TIP: To redisplay all topics, ensure that every drop-down menu displays their default settings and delete all text from the Ticket Number dataentry tool, then click the **Search** button.

For detailed information on the structure, content, and functionality of the Ticket Tracking page's search tools, refer to <u>Appendix E Ticket Tracking: Search Tools</u>.

5.5.3 ACCESSING A TICKET'S DISCUSSION THREAD

Each ticket has a discussion thread, which project participants can use to comment on a ticket.

To access a ticket's discussion thread:

1 In the Navigation pane, click **Ticket Tracking**.

The Ticket Tracking page loads (refer to Figure 20).



- 2 <u>Search for the ticket</u> whose discussion thread you want to access.
- 3 In the "Discussion" cell for the ticket, click the hyperlinked text.

Either a new discussion thread tool (refer to Figure 23) or an existing discussion thread (refer to Figure 33) loads.

To create a new discussion thread, refer to <u>Section 6.5.2 Creating a Discussion</u> <u>Thread</u> steps 3 – 7. To reply to an existing discussion thread, refer to <u>Section 6.5.4</u> <u>Replying to a Discussion Post</u>.

5.5.4 EXPORTING TICKET TRACKING SEARCH RESULTS

To help you manage many tickets at once, you can export Ticket Tracking search results to a Microsoft Excel file.

To export Ticket Tracking search results:

1 In the Navigation pane, click **Ticket Tracking**.

The Ticket Tracking page loads (refer to Figure 20).

2 Click the **Export to Excel** button.

Your browser's file download window loads, enabling you to either open the file with a file-compatible program or save the file to your local machine (refer to Figure 29).

3 Click either the **Open** button or the **Save** button to access the file.



6 Discussions

In the Payment Support Web Portal, the Discussions section enables you to:

- access summaries of all the topics currently available to you (Summary of Topics);
- create a new topic specifying new project activities (New Discussion Topic)
- access an overview of a specific topic (Topic Details);
- download and upload confidential topic documents (Topic Library); and
- discuss topic-related matters with Acumen, CMS, and/or other project participants online (Discussion).

Sections 6.1 – 6.5 provide detailed instructions for performing each of these activities.

6.1 Summary of Topics Page

The Summary of Topics page contains a summary of all the topics currently available to you. In addition, the page enables you to create new topics.

Summary of Topics							
Contract:	ALL		~				
Topic Area:	ALL		~				
Discussion:	ALL		~				
Keywords:				Search			
New Discussion Topic							
Торіс	Topic Area	Contract	Files	Discussion	Last Update 🔻		
Example Topic A	Other	<contract></contract>	Library	Start Discussion	05/24/2016		
Example Topic B	Reopenings	<contract></contract>	Library	Start Discussion	05/24/2016		
Displaying 1 to 2 of 2 items							

Figure 21. Summary of Topics Page



Please note that you may only access topics associated with your user group. To determine your user group and topic permissions, visit the Account Settings page or contact your authorizing agent⁶.

6.1.1 ACCESSING THE SUMMARY OF TOPICS PAGE

To access the Summary of Topics page:

1 In the Navigation pane, click **Summary of Topics**.

The Summary of Topics page loads (refer to Figure 21).

6.1.2 SEARCHING FOR ONE OR MORE TOPICS

The Summary of Topics page contains a set of search tools for filtering the list of displayed topics to those matching your search criteria.

To search for one or more topics:

1 In the Navigation pane, click **Summary of Topics**.

The Summary of Topics page loads (refer to Figure 21).

- 2 In the Search section, locate the Search tool you want to filter topics with.
 - **NOTE:** The Keywords field is a text field requiring data entry. All other Search tools are drop-down menus. When using the drop-down menus, you can either scroll through to select an option or enter the first few characters of an option to navigate to it. If you choose to enter characters, you must do so rapidly, as pausing between each character may reset your search.
- 3 Enter a filter option.
- 4 Repeat steps 2 and 3 for any other Search tools you want to use in your search.
- 5 Click the **Search** button.

The Portal filters table items to those matching your search criteria.

TIP:To redisplay all topics, ensure that every drop-down tool displays the
ALL option and delete all text from every data-entry tool, then click the
Search button.

⁶ For information on your authorizing agent, refer to the Glossary or contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).



For detailed information on the structure, content, and functionality of the Summary of Topics page's search tools, refer to <u>Appendix D Summary of Topics: Search Tools</u>.

6.2 New Discussion Topic

In the Payment Support Portal, you can create discussion topics to ask questions regarding reconciliation-related matters.

6.2.1 CREATING A NEW TOPIC

There are two steps to creating a new discussion topic:

- 1 Specifying an affiliated contract, a topic name, and a topic category; and
- 2 Establishing a discussion thread that announces the new topic to other users within your user group.

Note that, once you create a new topic, you will be able to transfer files and create or participate in discussion threads in relation to it, but you will NOT be able to modify the topic's details. If you need to modify a topic's details after creating it, contact the Part D Payment Support project team (<u>PartDPaymentSupport@AcumenLLC.com</u>).

To create a new topic:

1 In the Navigation pane, click **Summary of Topics**.

The Summary of Topics page loads (refer to Figure 21).

2 Below the Search tools, click the **New Discussion Topic** button.

The New Discussion Topic Page loads.



Figure	22.	New	Discussion	Topic Page
--------	-----	-----	------------	-------------------

New Discussion Topic				
Topic Details				
respond to your comments ar	Only your Contract, CMS, and CMS-approved contractors (e.g., Acumen) can review and respond to your comments and questions. Your specific questions and the relevant responses will not be shared with other Contracts.			
 Start the topic information Enter the discussion on 				
All fields marked with * are re	quired.			
Contract:*	Select a Contract	~		
Торіс:*				
Topic Area:*	Select the Topic Area	\checkmark		
Next Cancel				
Return to Summary of Topics				

- 1 Expand the "Contract:" menu and select the contract you want to associate with your topic.
- 2 In the "Topic:" field, enter a name for the topic.

TIP: We recommend creating descriptive but concise topic names.

- 3 Expand the "Topic Area:" menu and select a Payment Support category to classify your topic.
- 4 Click the **Next** button.

The New Discussion Thread page loads.



Home / Topics / New I	tem
Topics	
Do not post any pe policy and governm	rson-level identifiers or other confidential information as stipulated by the website security ent regulations.
	OK Cancel
	* indicates a required field
Subject *	1
Body	Discussion Threads
	Press Alt+F10 to enter the editor toolbar.
	OK Cancel

Figure 23. Example New Discussion Thread Page

- **WARNING:** Clicking the **Cancel** button will stop the creation of a discussion post, preventing users from receiving notification of Web Portal activity. As such, you should create an initial discussion post.
- 2 In the "Subject*" field, enter a subject for your post.
 - **NOTE:** The Portal will use the subject you enter as the title of the discussion thread. As such, we recommend creating descriptive but concise titles.
- 3 In the "Body" field, insert your cursor before the auto-populated **Discussion Threads** link.
 - **NOTE:** Once you submit your post, the **Discussion Threads** link will enable you and other users within your user group to link to the Discussion page from the thread directly.
- 4 Enter your message.
- 5 At the top or bottom of the page, click the **OK** button.



A non-confidential warning window loads, requiring you to confirm that you have not included any person-level identifiers or other confidential information in your post.

Figure 24. Non-Confidential Warning Window

Message fr	om webpage
?	I confirm that I have not posted any person-level identifiers or other confidential information as stipulated by the website security policy and government regulations.
	OK Cancel

NOTE: If your post contains confidential information, click the **Cancel** button and remove all confidential information from your message.

Then, click the **OK** button to re-access the non-confidential warning window.

6 After verifying that your post does NOT contain confidential information, click the **OK** button.

The Web Portal returns you to the Summary of Topics page (refer to Figure 21), which now displays your new topic. You can access the topic's new discussion thread via its Discussion page (refer to <u>Section 6.5.3 Accessing a Discussion Thread</u> for more information).

6.3 Topic Details

A Topic Details page contains summary information about a topic—including but not limited to the topic's name, description, and creation date. In addition, it contains the topic navigation menu, which consists of links to the Details page as well as a file library and a discussion board associated with the topic.



Figure 25. Example Topic Details Page

Topic: Example Topic A				
Topic Details	Library	Discussion		
Topic Details				
Topic:	Exa	mple Topic A		
Topic Area: Other				
Contract: <contract></contract>				
Submission Date: 05/24/2016				
Return to Summary of Topics				

6.3.1 ACCESSING THE TOPIC DETAILS PAGE

There are two ways to access a topic's Details page: (1) through the Summary of Topics page; and (2) through the topic navigation menu by selecting the "Topic Details" tab.

To access a Topic Details page through the Summary of Topics page:

1 In the Navigation pane, click **Summary of Topics**.

The Summary of Topics page loads (refer to Figure 21).

2 <u>Search for the topic</u> whose details you want to access.

The topics table displays your search results.

- TIP:To redisplay all topics, ensure that every drop-down tool displays the
ALL option and delete all text from every data-entry tool, then click the
Search button.
- 3 In the "Topic Name" column, click the topic name.

The Topic Details page loads (refer to Figure 25), displaying information details about the topic.

6.4 Topic Library

The Library page enables you to download and upload files related to a topic.



Figure	26.	Example	Library	Page
--------	-----	---------	---------	------

Topic: Example	Topic I		
Topic Details	Discussion		
Library			
Folder Path: T0001 022			
Search Type:	All	~	
Search Level:	Current Level	~	
Keywords:		Q Search	
1 Upload Files			All documents -
		No Folders/Files Found.	

Return to Summary of Topics

6.4.1 ACCESSING A LIBRARY PAGE

There are two ways to access a topic's Library page: (1) through the Summary of Topics page; and (2) through the topic navigation menu by clicking the **Library tab**.

To access a Library page through the Summary of Topics page:

1 In the Navigation pane, click **Summary of Topics**.

The Summary of Topics page loads (refer to Figure 21).

2 <u>Search for the topic</u> whose library you want to access.

The topics table loads your search results.

- TIP:To redisplay all topics, ensure that every drop-down tool displays the
ALL option and delete all text from every data-entry tool, then click the
Search button.
- 3 In the "Files" cell for the topic, click Library.

The Library page loads (refer to Figure 26).

6.4.2 SEARCHING FOR TOPIC-RELATED FILES AND FOLDERS

The Library page contains a search tool for filtering the list of files and/or folders to those matching your search criteria.

To search for one or more library-related files and/or folders:

1 <u>Access the Library page</u> for the topic you want to view the file library for.



- **NOTE:** When the Library page loads, it displays all files contained in the main folder for the library; it also displays subfolders, which contain a subset of files.
- 2 Expand the "Search Type" drop-down menu, and select one of the following options:
 - a. Files to search for files;
 - b. **Folders** to search for folders; or
 - c. All to search for files and folders.
- 3 Expand the "Search Level" drop-down menu, and select one of the following options:
 - a. Current Level to search contents in the current folder; or
 - b. All Levels to search contents within the current folder and all subfolders.
- 4 In the "Keywords:" field, enter keywords to locate the file(s) and/or folder(s) you would like to access.
- 5 Click the Search button.
 - TIP: You can enter all or part of a file's and/or folder's title in the "Keywords:" field and click the **Search** button to rapidly locate a file and/or folder.

The Portal filters table items to those matching your search term(s).

TIP:To redisplay the default view of the current folder, ensure that the
"Search Type" drop-down menu displays All and that the "Search
Level" drop-down menu displays Current Level. Delete all text from
the "Keywords:" field, and then click the Search button.

6.4.3 DOWNLOADING A TOPIC-RELATED FILE

Please note that the Library page requires your download password. To acquire this password, use the My Download Password page in the User Settings section of the Portal (for instructions, refer to <u>Section 8.4 Acquiring Your Download Password</u>).

To download a file from a Library page:

1 <u>Access the Library page</u> for the topic you want to download a file from.



- **NOTE:** When the Files page loads, it displays all files contained in the main folder for the library. It also displays subfolders with access to a subset of files.
- 2 Click the **Download** button.

The Download File tool loads below the table.

Topic: Example Topic A						
Topic Details Library D	Topic Details Library Discussion					
Library						
Click Download to select and save a fil	e, or Upload to submit a file.	L.				
Download Upload						
Download File Click the file name to select a file.						
File Name 🔺	Description	Date and Time	Uploaded By	File Size		
Example File A.txt		05/24/2016 06:32 PM	T0002	121 Bytes		
Example File B.docx		05/24/2016 06:32 PM	T0002	15.03 KB		
	Displa	aying 1 to 2 of 2 items				
Selected File: None Enter your download password: Download File Tool Download File Cancel Return to Summary of Topics						

Figure 27. Example Download File Tool

- 3 In the table of files, locate the file you want to download.
 - TIP: You can sort the contents of the table by clicking column headings, which sorts and re-sorts table contents in ascending and descending orders.
- 4 In the "File Name" cell, click the file name.

The "Selected File:" field displays the file name.

5 In the password field, enter your download password.

NOTE: For instructions on acquiring your download password, refer to <u>Section 8.4 Acquiring Your Download Password</u>.

6 At the base of the page, click the **Download File** button.



Topic: Example Topic A						
Topic Details Library Discussion						
Library Click Download to select and save a file, or Uploa	d to submit a file.					
Download Upload					→Step 2	
Download File						
Click the file name to select a file.					— Step 2 — Step 3	& 4
File Name 🔺 🛛 De	escription Date an	nd Time	Uploaded By	File Size		~ '
Example File A.txt	05/24/201	6 06:32 PM	T0002	121 Bytes		
Example File B.docx	05/24/201	6 06:32 PM	T0002	15.03 KB		
	Displaying 1 to 2 of 2 in	tems				
Selected File: Example File A.txt Enter your download password:						
••••••					→Step 5	
Download File Cancel					— Step 5 — Step 6	
Return to Summary of Topics	Download File Cancel Return to Summary of Topics					

Figure 28. File Download Steps

Your browser's file download window loads, enabling you to either open the file with a file-compatible program or save the file to your local machine.

Figure 29. Example File Download Window

File Down	load
Do you	ı want to open or save this file?
	Name: test.docx Type: Microsoft Word Document From: <web portal="" url=""> Open Save Cancel</web>
2	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

- 7 Click either the **Open** button or the **Save** button.
- 8 Repeat steps 3 7 for any other files you want to download.



NOTE: The Payment Support Portal site caches (stores) your download password while you remain in the Library page. As such, you will not need to repeat step 5 (re-enter your download password) to download additional files from the library while you <u>are actively using</u> the page.

6.4.4 UPLOADING A TOPIC-RELATED FILE

To upload a file to a Library page:

- 1 <u>Access the Library page</u> for the topic you want to upload a file to.
- 2 Click the **Upload** button.

The Upload File tool loads at the base of the page.

ission					
Library Click Download to select and save a file, or Upload to submit a file. Download Upload					
Description	Date and Time	Uploaded By	File Size		
	05/24/2016 06:32 PM	T0002	121 Bytes		
	05/24/2016 06:32 PM	T0002	15.03 KB		
Dis	playing 1 to 2 of 2 items				
Upload File Choose file(s) to upload:					
Description: Upload File Tool Upload File Cancel Return to Summary of Topics					
	Description	r Upload to submit a file. Description Date and Time 05/24/2016 06:32 PM 05/24/2016 06:32 PM Displaying 1 to 2 of 2 items	r Upload to submit a file. Description Date and Time Uploaded By 05/24/2016 06:32 PM T0002 05/24/2016 06:32 PM T0002		

Figure 30. Example Upload File Tool

3 Click the **Browse...** button.

A standard file upload window appears.

- 4 Navigate to and select the file you want to upload.
- 5 In the file upload window, click the **Open** button.



The upload window closes, and the "Choose a file to upload:" field displays the path to the file you just selected.

- 6 In the "Description:" field, enter any notes about the file that you want to include.
- 7 At the base of the page, click the **Upload File** button.

The Portal reloads the Library page (refer to Figure 26), which now contains your uploaded file.

6.5 Topic Discussions

All topics include a Discussion page for accessing and participating in online discussions hereafter, "discussion threads."

Topic: Example Topic A							
Topic Details Library Discussion							
Discussion	Discussion						
The table below lists all discussions associated wit	h this Topic.						
Click the thread subject line to view the discussion	L						
Click New Thread to create a new discussion.							
New Thread							
Subject	Review Status	Last Post Date 🔻					
Example Discussion A Reviewed 5/20/2016							
Example Discussion B Reviewed 5/18/2016							
Displaying 1 to 2 of 2 items							
Return to Summary of Topics							

Figure 31. Example Discussion Page

Note that you can establish discussion thread notifications through the <u>Setting Email</u> <u>Notifications page</u>.

6.5.1 ACCESSING A DISCUSSION PAGE

There are two ways to access a Discussion page: (1) through the Summary of Topics page; and (2) through the topic navigation menu by clicking the **Discussion** tab.

To access the Discussion page via the Summary of Topics page:



1 In the Navigation pane, click **Summary of Topics**.

The Summary of Topics page loads (refer to Figure 21).

2 <u>Search for the topic</u> whose Discussion page you want to access.

The results of your search load in the topics table.

- TIP:To redisplay all topics, ensure that every drop-down tool displays the
ALL option and delete all text from every data-entry tool, then click the
Search button.
- 3 In the "Discussion" cell for the topic, click the status.

The topic's Discussion page loads (refer to Figure 31).

6.5.2 CREATING A DISCUSSION THREAD

To create a discussion thread:

- 1 Access a topic's Discussion page.
- 2 At the top of the topics thread table, click the **New Thread** button.

The New Discussion Thread page loads (refer to Figure 23)

- 3 In the "Subject*" field, enter a subject for your post.
 - **NOTE:** The Portal will use the subject you enter as the title of the discussion thread. As such, we recommend creating descriptive but concise titles.
- 4 In the "Body" field, insert your cursor before the auto-populated **Discussion Threads** link.

NOTE: Once you submit your post, the **Discussion Threads** link will enable you and other users within your user group to link to the Discussion page from the thread directly.

- 5 Enter your message.
- 6 At the top or bottom of the page, click the **OK** button.

A non-confidential warning window loads, requiring you to confirm that you have not included any person-level identifiers or other confidential information in your post (refer to Figure 24).

NOTE: If your post contains confidential information, click the **Cancel** button and remove all confidential information from your message.



Then, click the **OK** button to re-access the non-confidential warning window.

7 After verifying that your post does NOT contain confidential information, click the **OK** button.

The Web Portal returns you to the discussion thread page, which now contains your new post.

6.5.3 ACCESSING A DISCUSSION THREAD

To access a specific discussion thread for a topic:

- 1 Access a topic's Discussion page.
- 2 In the discussion table, locate the discussion thread you want to access.
 - TIP:You can enter all or part of a discussion thread's subject in the
"Search:" field and click the Search button to rapidly locate a thread;
if you do so and subsequently need to clear your search, remove all
text from the "Search:" field and click the Search button.

You can also sort the contents of the table by clicking column headings, which sorts and re-sorts table contents in ascending and descending orders.

3 In the "Subject" column, click the subject title.

The discussion thread loads.



pics		
		View: Flåt →
sted By	Post	
sted: 4/14/2016 2:44 P	М	View Properties 🗾 Reply
	This is an example reply.	
Acumen Test	¥Show Quoted Messages	
arted: 4/14/2016 2:40 P	M	View Properties 🗸 Reply
	Example Discussion A	
	This is an example discussion thread.	
Acumen Test		
	Discussion Threads	

Figure 32. Example Discussion Thread

2 Threading Column Header **4** View Properties

NOTE: Discussion threads have four components: (1) a "View" menu, which enables you to alter how the Portal displays the thread; (2) column headers, which consist of "Posted By" and "Post," (3) a **Reply** button, which enables you to reply to any post in the thread; and (4) a "View Properties" link, which links you to a detailed view of the post.

6.5.4 REPLYING TO A DISCUSSION POST

To reply to a discussion post:

- 1 Access the discussion thread you want to post a reply to.
- 2 In the thread, locate the specific discussion post you want to reply to.
- 3 In the top-right corner of the discussion post, click **Reply**.

The New Reply Page loads.



Home / Topics / Example	e Discussion A / New Item	
Do not post any pers policy and governmer	son-level identifiers or other confidential information as stipulated by the website securit int regulations.	у
	ОК	Cancel
Body	This is another example reply	^
-	From: Acumen Test Posted: Thursday, April 14, 2016 2:44 PM Subject: Example Discussion A	
	This is an example reply.	~
	Press Alt+F10 to enter the editor toolbar.	
	ОК	Cancel

Figure 33. Example New Reply Page

- 4 In the "Body" field, enter your message.
- 5 At the top or bottom of the page, click the **OK** button.

A non-confidential warning window loads (refer to Figure 24), requiring you to confirm that you have not included any person-level identifiers or other confidential information in your reply.

NOTE: If your reply contains confidential information, click the **Cancel** button and remove all confidential information from your message.

Then, click the **OK** button to re-access the non-confidential warning window.

6 After verifying that your post does NOT contain confidential information, click the **OK** button.

The Web Portal returns you to the discussion thread page, which now contains your reply.



6.5.5 REVIEWING A DISCUSSION THREAD

In addition to replying to a discussion thread, you can use the **Reviewed** button to mark an unreviewed⁷ thread as reviewed.

Note that the Web Portal only displays the Reviewed button for unreviewed threads; as such, you must select an unreviewed thread in order to access and use the button.

To do so:

1 <u>Access the discussion thread</u> you want to mark as reviewed.

The discussion thread loads, and the Web Portal displays a **Reviewed** button at the base of the Navigation pane.

🖀 Home
Reopening Requests
🕒 Upload Files
Ticket Tracking
Discussions
Summary of Topics
Documentation
Reference Docs
User Settings
Change Login Password
Account Settings
My Notifications
My Download Password
🖙 Log Out
Reviewed

Figure 34. Reviewed Button Location

2 At the base of the Navigation pane, click the **Reviewed** button.

The Portal refreshes and marks the thread as reviewed.

⁷ A discussion thread displays as "unreviewed" when no member of your user group has previously reviewed the thread. Once a member of your user group has marked the thread as "reviewed," it appears as such to all user group members.



7 Documentation

The Reference page enables you to download general reference documentation related to the Payment Support project, including the template reopening request spreadsheet.

7.1 Searching for One or More Items in the Reference Library

The Reference page contains a search tool for filtering the reference library to those files and/or folders matching your keywords.

To search for one or more files and/or folders in the reference library:

1 In the Navigation Pane, click **Reference**.

The Reference page loads, displaying all of the folders and files currently available to you.

	ence Docs				
Folder Pat	h: Reference Docs				
Keyword	is:		Q Sear	ch	
				All	documents 🕶
Туре	Name	Description	Created Date and Time	Created By	File Size
	Sample Folder		12/05/2018 03:12 PM		
R	Sample File A		12/05/2018 03:04 PM	Acumen Admin	70.18 MB
		Dis	playing 1 to 2 of 2 items		

Figure 35. Example Reference Page

- 2 In the "Keywords:" field, enter one or more keywords.
- 3 Click the Search button.
 - TIP:You can enter all or part of a reference file's and/or folder's title in
the "Keywords:" field, and click the Search button to rapidly locate
files and/or folders. If you do so and subsequently need to clear your



search, remove all text from the "Keywords:" field, and click the **Search** button.

- 4 In the table, locate the file or folder you want to access.
 - TIP: You can sort the contents of the table by clicking column headings, which sorts and re-sorts table contents in ascending and descending orders.

7.2 Downloading a File from the Reference Docs Library

Please note that you can only download library files one at a time.

To download a file from the Reference library:

1 In the Navigation pane, click **Reference**.

The Reference Docs page loads, displaying all of the file folders and files currently available to you.

ype Na	ame	Modified	Modified By	File Size	Edit
	ample User Guide	8/11/2018 9:46 PM	Sample User A	2534 KB	
Sa	ample Document A	12/29/2017 5:02 PM	Sample USer B	473 KB	

Figure 36. Example Reference Page

- 1 In the table, locate the file or folder you want to download.
 - TIP:You can sort table contents by clicking column headers.NOTE:You can access folder contents by clicking the folder name or icon ().



2 Click the file name.

A file download window loads, enabling you to either open the file with a filecompatible program or save the file to your local workstation (refer to Figure 29).

3 Click either the **Open** button or the **Save** button.



8 User Settings

User Settings pages enable you to:

- change your login password;
- modify your account settings;
- set email notifications for topic activities; and
- acquire your download password.

8.1 Changing Your Login Password

Your login password expires every 60 days. Before the expiration deadline, you can set a new login password via the Change Login Password page.

Please note that if you do not modify your password before the 60-day deadline, the Web Portal will prompt you to change your password upon your next log in. However, you CANNOT change your login password more than once in a 24-hour period.

To change your current login password:

1 In the Navigation pane, click **Change Login Password**.

The Change Login Password page loads.



Figure 37. Change Login Password Page

Change Login Password	b					
 Please supply the following information. Your new password must meet the following complexity requirements: Be at least eight characters long. Use three of the following four character sets: Lower case (a - z) Upper case (A - Z) Numbers (0 - 9) Special characters (!@#\$%^&*()_+=) Be different than your last 24 passwords. Not have changed within the last 24 hours. Not contain your email address, username, or full name. All fields marked with * are required.						
Username:	<user name=""></user>					
Current Password:*						
New Password:*	New Password:*					
Confirm New Password:*						
	Change Password Cancel					

- 2 In the "Current Password:" field, enter your current password.
- 3 In the "New Password:" field, enter a password that meets the following, federally stipulated password criteria:
 - a. Is at least 8 characters long.
 - b. Contains the following four character types:
 - i. Lowercase letters (a-z)
 - ii. Uppercase letters (A-Z)
 - iii. Numbers (0-9)
 - iv. Symbols (! @ # \$ % ^ & * () _ + =)
 - c. Is different from your last 24 passwords.
 - d. Has not changed within the last 24 hours.
 - e. Does not contain your email address, username, or full name.



- 4 In the "Confirm New Password:" field, re-enter the password you just created.
- 5 Click the **Change Password** button.

A successful password change message loads.

Figure 38. Successful Password Change Message

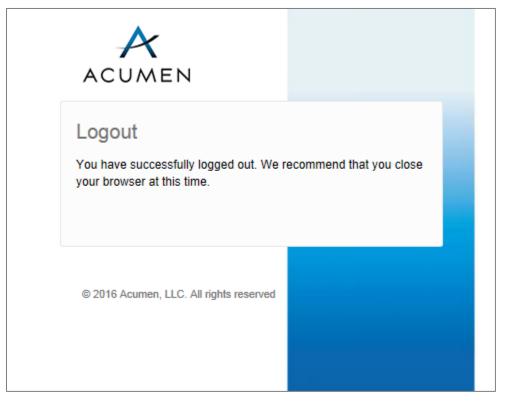
ACUMEN				
Success! Your login password has been changed. You will need to log back into the website using your new password to confirm the change. Please click the button below or close your browser to log out. Logout				
© 2016 Acumen, LLC. All rights reserved				
	Success! Your login password has been changed. You will need to log back into the website using your new password to confirm the change. Please click the button below or close your browser to log out. Logout			

6 Click the **Log Out** button.

A successful logout message loads.



Figure 39. Successful Logout Message



7 Click the Close Window button.

Your browser may load a notification that the Portal is attempting to close the browser window or tab. If so, click the **Yes** button.

NOTE: If you have accessed and used the Web Portal via a browser tab, we strongly recommend closing your browser window to reduce the possibility of any caching issues.

- 8 Launch a new browser session.
- 9 Complete the standard login process.

8.2 Modifying Your Account Settings

You can modify your security questions and answers on the Account Settings page. You can also view the contact information and access groups for your account.



Note that you cannot change or update your contact information through the Account Settings page. To do so, you must contact your authorizing agent⁸.

To do so:

1 In the Navigation pane, click **Account Settings**.

The Account Settings page loads.

Figure 40. Account Settings Page

Account Settings		
Username	<username></username>	
Contact Information	🚨 <name></name>	
	✓ <email address=""></email>	
	<pre>\$ <phone number=""></phone></pre>	
	♀ <address></address>	
Security Questions	Configured on 03/15/2016	Edit
Authorized Groups fo	or Part D Payment Process Support	
Your user account has the follo	wing groups associated for the Part D Payment Process Support website:	
• <contract></contract>		
Note: Website access cannot modify your website access.	be changed on this page. Please contact your Medicare Compliance Officer	to

2 In the Security Questions row, click the **Edit** link.

The Account Settings – Verify Account Page loads.

⁸ For information on your authorizing agent, refer to the Glossary or contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).



Account Settings
Verify Account
To proceed, you will need to verify your account using one of the methods below.
Select a method for verifying your account:
Security Question Answer a security question chosen at random.
 Phone One-Time-Password Enter the six digit verification ID sent to the phone number on record.
Cancel Next

Figure 41. Account Settings – Verify Account Page

- **NOTE:** You may choose one of two options for account verification: (1) answering a security question or (2) phone verification. These instructions will describe the process following option 1. For phone verification instructions, refer to <u>Section 2.5 Phone Number</u> <u>Verification</u>.
- 3 Select your preferred option for account verification and click the **Next** button.

The Account Settings – Verify Account page – Security Question loads.

Figure 42.	Account	Settings -	Verify	Account	Page -	Security	Question

Account Set	tings					
Verify Account						
You will need to verify your account by answering a security question chosen at random.						
All fields marked with * are required.						
Question:	What was your first phone number?					
Answer: *						
Cancel Next						

- 4 In the "Answer:" field, enter the answer to the security question.
- 5 Click the Next button.



The Edit Security Questions page loads.

Figure	43.	Edit	Security	Questions	Page
1 1941 0		Long	occurry	Quootiono	

Account Set	tings	
Edit Security	Questions	
Select security questions from the drop-down menus, and then provide answers in the text box below. You must correctly answer your security questions to verify your identity in the future.		
All fields marked wit	h * are required.	
Question 1: *		
Answer 1: *		
Question 2: *		
Answer 2: *		
Question 3: *		
Answer 3: *		
Cancel Subr	nit	

- 6 For each of the question drop-down menus, expand the menu and select a security question.
- 7 In the answer field corresponding to a selected question, enter a response.
 - **NOTE:** The Web Portal factors spaces—but not case—into its validation of your online responses to your security questions. This means that if you were to enter the response "Jane Doe" in one of the answer fields, the Web Portal would accept "jane Doe," "Jane doe," "JANE DOE," and "jane doe" but would reject "JaneDoe."
- 8 Click the **Submit** button.

The Account Settings page loads with a successful security question change message.



Account Settings		
You have successfully set y	your security questions.	
Username	<username></username>	
Contact Information	🛔 <name></name>	
	✓ <email address=""></email>	
	📞 <phone number=""></phone>	
	♀ <address></address>	
Security Questions	Configured on 03/25/2016	Edit

8.3 Setting Email Notifications

The Setting Email Notifications page enables you to set email notifications for newly created topics as well as existing topic activities.

To do so:

1 In the Navigation pane, click **My Notifications**.

The Setting Email Notifications page loads.

Figure <u>36</u> 44.	Setting	Email	Notifications	Page
	00000			

Setting Email Notifications
You can choose to receive email notifications when there are new updates to your Study(ies). Specify when you would like to be notified by selecting one of the options below.
Notify me of new updates to my Study(ies):
O Never
O Immediately
O Hourly
Daily (at the end of the day)
O Weekly (at the end of the week)
Note: You will only receive a notification if there is an update within the timeframe selected above.
Save



- 2 Select one of the following frequency options:
 - a. Never
 - b. Immediately
 - c. Hourly
 - d. Daily
 - e. Weekly

NOTE: By default, the Portal selects the "Daily" option.

3 Click the Save button.

8.4 Acquiring Your Download Password

You can retrieve your download password through the My Download Password page. To do so, you must acquire a confirmation code through the Portal (if you do not have one) and use it to access your download password.

Please note that for security reasons, new download passwords may take up to 24 hours to activate.

8.4.1 ACQUIRING YOUR CONFIRMATION CODE

To acquire a confirmation code:

1 In the Navigation pane, click My Download Password.

The My Download Password page loads.

Figure 3745. My Download Password Page

My Download Passw	ord	
To view your download password, following options:	, you need the latest confirmation code	emailed to you. Select one of the
I have a confirmation code	I need a new confirmation code	
Copy and paste your confirmation All fields marked with * are requir	n code in the box below and press the V ed.	iew Download Password button.
Confirmation Code: *	View Download Password	

2 Select the "I need a new confirmation code" tab.



The Confirmation Code tab loads.

Figure	3846	Frample	Confirmation	Code	Tah
rigure	<u>3040</u> .	Example	Commation	Coue	Iau

My Download Pas	sword
To view your download passv following options:	vord, you need the latest confirmation code emailed to you. Select one of the
I have a confirmation cod	le I need a new confirmation code
and press the Email New Con	word and receive a new confirmation code, you must answer your secret question firmation Code button. s, new download passwords may take up to 24 hours to activate.
All fields marked with * are re	equired.
Question:	What year was your father born?
Answer: *	<answer></answer>
	Email New Confirmation Code

- 3 In the "Answer:" field, enter the answer to your security question.
- 4 Click the Email New Confirmation Code button.
- 5 In your workstation, check your email.

Your email inbox should contain a confirmation code email from the Account Management Web Portal.

Figure <u>39</u>47. Example Confirmation Code Email

Dear <your name="">,</your>	
You will need a download password	to access confidential files from the Web Portal. Your download password is separate from your login password.
To retrieve your download password	
 Copy the following Confirma Go to the My Download Pass Web Portal's Download Pass Enter the code in the Confirm Click View Download Passw 	word Page Link> ation Code field
A Download Password field appears	and displays your download password.
If you have any questions or did not	request to retrieve your download password, please contact Acumen at WebAssistance@AcumenLLC.com or (650) 931-9402.
Thank you, Acumen, LLC	
NOTE:	If, after 10 minutes, your inbox does not contain a Portal email,

contact Website Support (WebAssistance@AcumenLLC.com).



8.4.2 ACQUIRING YOUR DOWNLOAD PASSWORD

To acquire a download password:

1 In the Navigation pane, click **My Download Password**.

The My Download Password page loads (refer to Figure 37 Figure 45).

- TIP: If you have just received your confirmation code via email, you can use the My Download Password link within the email message to access the My Download Password page.
- 2 In your email inbox, locate the email containing your confirmation code.
- 3 Highlight the code, then press **Ctrl + C** on your keyboard.
- 4 Ensure that the browser displaying the My Download Password page is active.
- 5 Insert your cursor in the "Confirmation Code:" field, then press Ctrl + V.
- 6 Click the View Download Password button.

The My Download Password page displays your download password.

Figure <u>4048</u>. Download Password View

My Download Password		
To view your download password, you need the latest confirmation code emailed to you. Select one of the following options:		
I have a confirmation cod	e I need a new confirmation code	
Copy and paste your confirma All fields marked with * are re	ation code in the box below and press the View Download Password button. equired.	
Confirmation Code: *	<confirmation code="" email="" from=""></confirmation>	
	View Download Password	
Download Password:	<download password=""></download>	

TIP:

To copy your download password, highlight it with your cursor, then press **Ctrl + C** on your keyboard.



9 Logout

To log out of the Payment Support Web Portal:

1 In the Navigation pane, click **Log Out**.

The successful log out message loads, prompting you to close your browser or browser tab (refer to Figure Figure 38).

2 Click the **Close Window** button.

Your browser may load a notification that the Portal is attempting to close the browser window or tab. If so, click the **Yes** button.

NOTE: If you have accessed and used the Web Portal via a browser tab, we strongly recommend closing your browser window to reduce the possibility of any caching issues.



10 Forgot Username and Password

If you forget your user credentials, you can acquire your username and reset your login password⁹ through the Web Portal's Login page.

10.1 Acquiring Your Username

To acquire your username:

- 1 Launch a web browser.
- 2 In the browser address field, enter the Web Portal's URL:

https://PartD.ProgramInfo.US/PaymentSupport

- 3 Verify that the URL in the address field matches the URL specified in step 2.
- 4 After verifying the URL, press the **Enter** key on your keyboard. The Terms and Conditions page loads (refer to Figure 5).
- 5 Read the Terms and Conditions, then click the **OK** button.The Login page loads (refer to Figure 6).
- 6 At the base of the page, click the **"Forgot Username?"** link.

The Forgot Username page loads.

⁹ To ensure that malicious parties cannot acquire your login password through the Forgot Password page, the Payment Support Portal does not enable you to acquire your existing login password when you forget it. Instead, you must reset it through the Forgot Password page.



Figure <u>41</u>49. Forgot Username Page

ACUMEN	Account Management
	Forgot Username All fields marked with * are required.
	Email Address *
	Submit Request

- **NOTE:** The Forgot Username feature for the Payment Support Web Portal operates through the Account Management Web Portal. Once you have received your username, you will have to return to the Payment Support Web Portal to log in.
- 7 In the "Email Address:" field, enter your email address.
 - **NOTE:** You must enter the email that you provided to your authorizing agent¹⁰.
- 8 Click the **Submit Request** button.

Upon confirming your email address, the Account Management Web Portal will send you an email with your username.

¹⁰ For information on your authorizing agent, refer to the Glossary or contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).



Figure <u>42</u>50. Example Forgot Username Email

Dear <name>,</name>
Your username is: <username></username>
If you have any questions or did not request to retrieve your username, please contact Acumen at <u>Website Support@acumenllc.com</u> or (650) 931-9402.
Thank you, Acumen, LLC

NOTE: If, after 10 minutes, your inbox does not contain a Portal email, contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).

10.2 Resetting Your Password

For security purposes, you must reset your password when you forget it.

To do so:

- 1 Launch a web browser.
- 2 In the browser address field, enter the Web Portal's URL:

https://PartD.ProgramInfo.US/PaymentSupport

- 3 Verify that the URL in the address field matches the URL specified in step 2.
- After verifying the URL, press the Enter key on your keyboard.The Terms and Conditions page loads (refer to Figure 5).
- 5 Read the Terms and Conditions, then click the **OK** button.The Login page loads (refer to Figure 6).
- 6 At the base of the page, click the "Forgot Password?" link.The Forgot Password page loads.



Figure <u>43</u>51. Forgot Password Page

ACUMEN	Account Management
	Forgot Password Enter your username to begin the password reset process. All fields marked with * are required.
	Username * Submit Request

NOTE: The Forgot Password feature for the Payment Support Web Portal operates through the Account Management Web Portal. Once you have reset your password, you will have to return to the Payment Support Web Portal to login.

- 7 In the "Username:" field, enter your username.
- 8 Click the **Submit Request** button.

The Web Portal verifies your username based on your response and, on verification, emails you a temporary login password link, which you can then use to reset your login password.

9 In your workstation, check your email.

Your email inbox should contain a password email from the Web Portal.



Figure 4452. Example Change Login Password Email

Dear <Name>,

To reset your login password:

- 1. Close all internet browser windows
- 2. Click the following link: Change Login Password
- 3. Follow the web portal instructions to verify your information and create a new password

If you have any questions or did not request to reset your password, please contact Acumen at <u>Website_Support@acumenllc.com</u> or (650) 931-9402.

Thank you, Acumen, LLC

NOTE: If, after 10 minutes, your inbox does not contain a Portal email, contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).

10 In the email message, click the **Change Login Password** link.

The Create Password page loads (refer to Figure 2).

- 11 In the "Username:" field, enter your username.
- 12 Click the Next button.

The Create Password – Verify Account page loads.

Figure <u>45</u>53. Create Password – Verify Account Page

ACUMEN	Account Management		
	Create Password		
	Verify Account		
	To proceed, you will need to verify your account using one of the methods below.		
	Select a method for verifying your account:		
	 Security Question Answer a security question chosen at random. 		
	 Phone One-Time-Password Enter the six digit verification ID sent to the phone number on record. 		
	Cancel Next		



- **NOTE:** You may choose one of two options for account verification: (1) answering a security question or (2) phone verification. These instructions will describe the process following option 1. For phone verification instructions, refer to <u>Section 2.5 Phone Number</u> <u>Verification</u>.
- 13 Select your preferred option (i.e., **Security Question**) for account verification.
- 14 Click the **Next** button.

The Create Password - Verify Account page - Security Question loads

Figure <u>46</u>54. Create Password – Verify Account Page – Security Question

ACUMEN	Account Management	
	Create Password	
	Verify Account	
	You will need to verify your account by answering a security question chosen at random. All fields marked with * are required.	
	Question: What is your favorite pet's name?	
	Answer: *	
	Cancel Next	

- 15 In the "Answer:" field, enter your answer to the security question.
- 16 Click the Next button.

The Create Password page loads (refer to Figure 3).

- 17 In the "Password:" field, enter a password that meets the following criteria:
 - a. Is at least 8 characters long.
 - b. Contains the following four character sets:
 - i. Lowercase letters (a-z)
 - ii. Uppercase letters (A-Z)
 - iii. Numbers (0-9)
 - iv. Symbols (! @ # \$ % ^ & * () _ + =)
 - c. Is different from your last 24 passwords.
 - d. Has not changed within the last 24 hours.



- e. Does not contain your email address, username, or full name.
- 18 In the "Confirm Password:" field, re-enter the password you just created.
- 19 Click the Submit button.

The Password Created message loads (refer to Figure 4).

- 20 Click the **Continue** button.
- 21 Complete the <u>standard login process</u> using your new password.



Appendix A Web Portal Panes

As stated in Section 1.2, the Payment Support Portal has four main panes: Header, Navigation, Information, and Footer.

Header Pane

The Header pane contains the Acumen logo, as well as two drop-down menus: **Portals**, with links to other Program Integrity portals you can access; and a user icon, which displays user information and a **Log Out** link that logs you out of the Payment Support Web Portal.

Navigation Pane

The Navigation pane contains link headers¹¹ and page links, which Table 3 defines in alphabetical order.

TITLE	HEADER/LINK	PAGE FUNCTION/HEADER DESCRIPTION
Account Settings	Link	Displays user group ¹² access and contact information as well as enables you to change your security questions and answers.
Change Login Password	Link	Modifies your current password.
Contract File History	Link	Contains all successful file uploads specific to a contract.
Discussions	Header	Titles the Portal's topic management tool.
Documentation	Header	Titles the Portal's general reference library.
Home	Link	Contains announcements related to the Payment Support project.

Table 5. Link Headers & Page Links

¹¹ Headers label sets of related Web Portal page links.

¹² A *user group* is a set of Portal user permissions (for example, read or read and write), typically defined according to your organizational affiliation (for example, CMS or Acumen).



TITLE	HEADER/LINK	PAGE FUNCTION/HEADER DESCRIPTION	
Log Out	Link	Logs you out of the Web Portal.	
My Download Password	Link	Enables you to acquire your download password for topic file libraries, using a Portal-supplied confirmation code.	
My Notifications	Link	Configures email notifications for topic activities.	
Reference Docs	Link	Provides access to general reference documents related to the Payment Support project.	
Upload Data	Header	Titles the Reopening Requests-related tools.	
Summary of Topics	Link	 Loads the Summary of Topics page, which enables you to: access an overview of topics related to Acumen support services; download and upload files related to a topic; and discuss topic-related matters with Acumen, CMS, and/or other project participants online. 	
Ticket Tracking	Link	Enables you to monitor the ticket statuses of reopening requests submitted.	
User Settings	Header	Groups all user settings tools.	
Upload Files & User History	Link	Enables you to upload files to a contract and view upload file history specific to your account.	

Embedded Pages

In addition to the Navigation pane links, the Payment Support Portal features the following **embedded pages** (that is, pages only accessible through **parent pages** listed in the Navigation pane).



Table 6. Embedded Page Links

PARENT PAGE(S)	PAGE LINK	CONTENTS
Home	{Announcement Title}	Loads the full view of an announcement.
Summary of Topics	Library	Contains topic-specific files as well as tools to download and upload them.
Summary of Topics	{Topic Name }	Summarizes the topic.
Summary of Topics	Closed Reviewed Unreviewed	Links to a closed discussion board, (Closed), or an active discussion board (Reviewed and Unreviewed).

Information Pane

The Information pane displays the contents of Web Portal pages.

For example, when you click the **Account Settings** link in the Navigation pane, the Portal loads the Account Settings page's contents—that is, contact information and user group specifications—in the Information pane.

Note that when you log in to the Web Portal, the Information pane will automatically display the Home page.

Footer Pane

The Footer pane contains links to five pages: Accessibility, Accessibility Plugins, Privacy Policy, Security Policy, and Contact Us.

Table 7. Footer Pane Links

PAGE LINK	CONTENTS	
Accessibility	Contains Section 508 compliance information.	



PAGE LINK	CONTENTS	
Accessibility Plugins	Contains links to plugins (Adobe Reader, Microsoft Office) for accessing Acumen Web Portal contents.	
Contact Us	Contact information for Project Assistance (PartDPaymentSupport@AcumenLLC.com).	
Privacy Policy	Articulates Acumen's policies and practices for securing your personal information.	
Security Policy	Contains rules of behavior for accessing and using the Payment Support Web Portal.	



Appendix B Upload Process Statuses

Table 8 defines the different types of process statuses for file uploads.

Table 8. Upload Process Statuses' Descriptions

STATUS	DESCRIPTIONS	
File(s) processed.	Files processed successfully.	
Error occurred. Resubmit.	Unknown error occurred. File(s) cannot be processed.	
Invalid file(s). Correct and resubmit.	Supporting documentation must be .doc, .docx, .pdf, or .xlsx files and include a valid Reopening Request Spreadsheet. Tickets must be complete and follow the naming convention.	
No file(s) found. Resubmit.	Submitted ZIP file is empty.	
Processing	File(s) is being processed.	
Contains contract(s) with no access. Correct and resubmit.	The workbook contains at least one contract to which you lack access. You must correct the invalid contract and resubmit.	
Unable to open ZIP.ZIP file cannot be opened. File(s) cannot be processedResubmit.		



Appendix C Ticket Tracking Statuses

Table 9 defines the different types of ticket tracking statuses for reopening requests.

Table	9. Ticket Tracking Statuses' Explanations

STATUS	EXPLANATION	
Additional Information Requested	Acumen requires more information for investigation. Acumen and/or CMS will reach out to user with further instructions.	
Closed	Relevant processing of reopening request is complete.	
Pending Review	The initial ticket status after a user uploads a reopening request or additional/updated files.	
Request Confirmed, Awaiting Global Reopening	Investigation complete. CMS intends to process the revised data in the regularly scheduled global reopening.	
Request Confirmed, Awaiting Offset	Investigation complete. CMS intends to process the revised data and recover overpayment via offset from regularly scheduled CMS payments to sponsors.	
Request Confirmed, Awaiting Processing	Investigation complete. Further details are presently unknown or unavailable.	
Request Confirmed, Awaiting Targeted Reopening	Investigation complete. CMS intends to reopen and revise the final payment determination for a specific parent organization (PO).	
Request Under Review	Acumen has confirmed the reopening request spreadsheet is complete and will proceed with the initial review.	



Appendix D Summary of Topics: Search Tools

There are two types of Search tools in the Summary of Topics page:

- (1) Data-entry fields; and
- (2) Drop-down menus.

Table 10 defines these tools according to their type and principal contents or functionality, presenting them in alphabetical order.

NAME	ТҮРЕ	DESCRIPTION	
Contract	Drop-Down Menu	Enables you to select the contract associated with a topic.	
Discussion	Drop-Down Menu	Enables you to select one of the following discussion statuses: ALL Unreviewed Reviewed Closed	
Keywords	Data-Entry Field	Enables you to enter a keyword—that is, a word or set of words that the Portal will search against fields in the Topic Details page with the exception of the Submission Date. Note that the Keywords tool uses <i>all</i> the terms you enter to search each field. For example, entering a study name and a description term will prompt the tool to search all fields using <i>both</i> terms.	

Table 10. Summary of Topics: Search Tools



NAME	ТҮРЕ	DESCRIPTION
Topic Area	Drop-Down Menu	Enables you to select one of the following topic areas:
		• ALL
		Appeals
		Attestations
		Data Submission
		• DIR
		• P2P
		Reopenings
		• Other
Search Level	Drop-Down Menu	Enables you to select one of the following topic areas:
		Current Level
		All Levels
Search Type	Drop-Down Menu	Enables you to select one of the following search types:
		• Files
		Folders
		• ALL



Appendix E Ticket Tracking: Search Tools

There are two types of Search tools in the Ticket Tracking page:

- (1) Data-entry fields; and
- (2) Drop-down menus.

Table 10 defines these tools according to their type and principal contents or functionality, presenting them in alphabetical order.

NAME	ТҮРЕ	DESCRIPTION
Contract Year	Drop-Down Menu	Enables you to select a reporting year.
Ticket Status	Drop-Down Menu	 Enables you to select one of the following statuses: ALL Additional Information Requested Closed Pending Review Requested Confirmed, Awaiting Global Reopening Requested Confirmed, Awaiting Offset Requested Confirmed, Awaiting Processing Requested Confirmed, Awaiting Targeted Reopening Requested Confirmed, Awaiting Targeted Reopening Request Under Review
Ticket Number	Data-Entry Field	Enables you to enter all or part of a ticket number.

Table 11. Ticket Tracking: Search Tools



Acronyms

ACRONYM	FULL TERM	
CMS	Centers for Medicare & Medicaid Services	
HPMS	Health Plan Management System	
HTML	Hypertext Markup Language	
IE	Internet Explorer	
PO	Parent Organization	
URL	Uniform Resource Locator	



Glossary

TERM	DEFINITION	
authorizing agent	The person authorized to establish and modify your Web Portal user permissions.	
	For more information on your authorizing agent, contact Website Support (<u>WebAssistance@AcumenLLC.com</u>).	
confidential	"Data or information [that] is not made available or disclosed to unauthorized persons or processes." ¹³	
discussion board	A group of related online discussions, referred to as "discussion threads."	
discussion thread	A set of online message posts related to a single topic.	
download password	The password required to download a file from topic file libraries.	
login password	The password you use to log in to the Portal.	
Uniform Resource Locator (URL)	"The address of a resource (as a document or Web site) on the Internet that consists of a communications protocol followed by the name or address of a computer on the network and that often includes additional locating information (as directory and file names)." ¹⁴	
unreviewed	A status for discussion threads indicating no member of your user group has previously marked the thread as reviewed.	
user group	A set of Portal user permissions (for example, "read" or "read and write"), typically defined according to your organizational affiliation (for example, CMS or Acumen).	

 ¹³ <u>HIPAA Administrative Simplification: Regulation Text</u>
 ¹⁴ <u>Merriam-Webster entry for URL</u>



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