Part D Payment Process Support Web Portal

USER GUIDE

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Revision Log

DATE	MANUAL SECTION	REVISION
7/2015	ALL	User Guide created.
7/2016	ALL	Updated for new web portal design.
5/2017	1, 5	Updated to reflect new project terminology.
6/2017	ALL	Updated to reflect new project terminology.
11/2018	1, 5	Updated to reflect new project terminology.
03/2021	6, 7	Updated to reflect new search features.

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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 project[1] 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 Portal[2]. 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
1 Introduction	Understanding the Web Portal's design, including its layout and access requirements.
2 Account Configuration	Configuring your Web Portal account.
3 Login	Logging in to the Web Portal.
4 Announcements	Accessing Home page announcements.
5 Upload Data	• Uploading reopening requests for payments; and • Tracking the status of a submitted reopening request.
6 Discussions	• 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.
9 Logout	Logging out of the Web Portal.
10 Forgot Username and Forgot Password	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

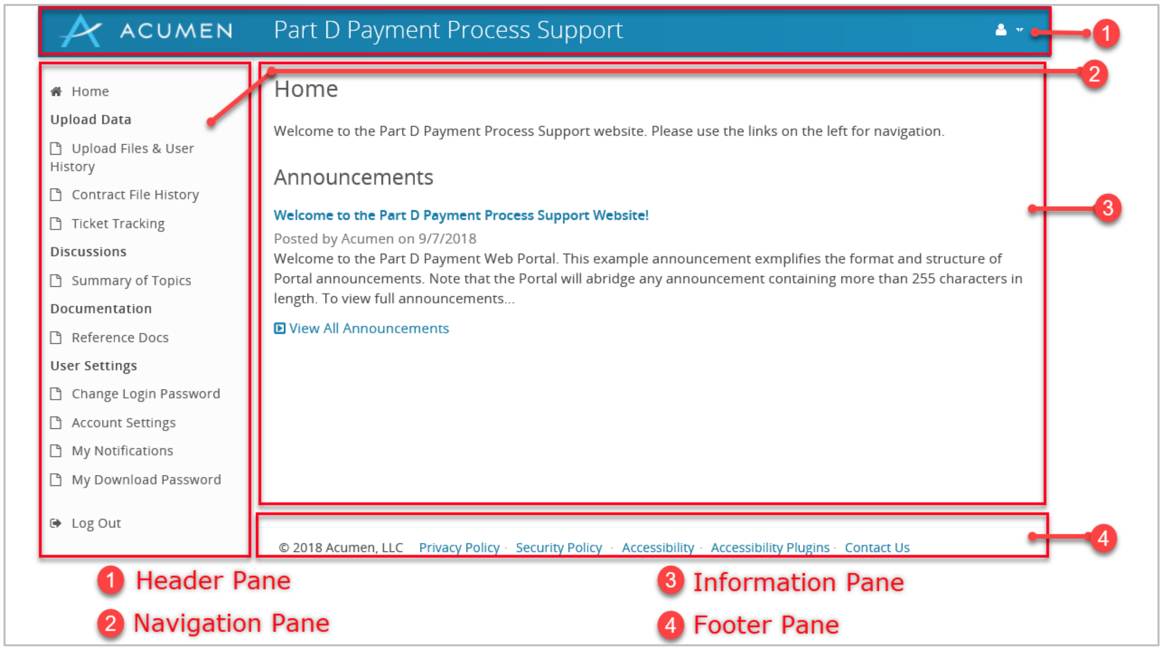


Table 2. Web Portal Pane Overview

PANE	DESCRIPTION
Footer	Contains links to Acumen's security and privacy policies, accessibility information, accessibility plugins, and contact information for Project Assistance (PartDPaymentSupport@AcumenLLC.com). For technical Portal assistance, contact Website Support (WebAssistance@AcumenLLC.com).
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 WebAssistance@AcumenLLC.com.

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 WebAssistance@AcumenLLC.com.

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]

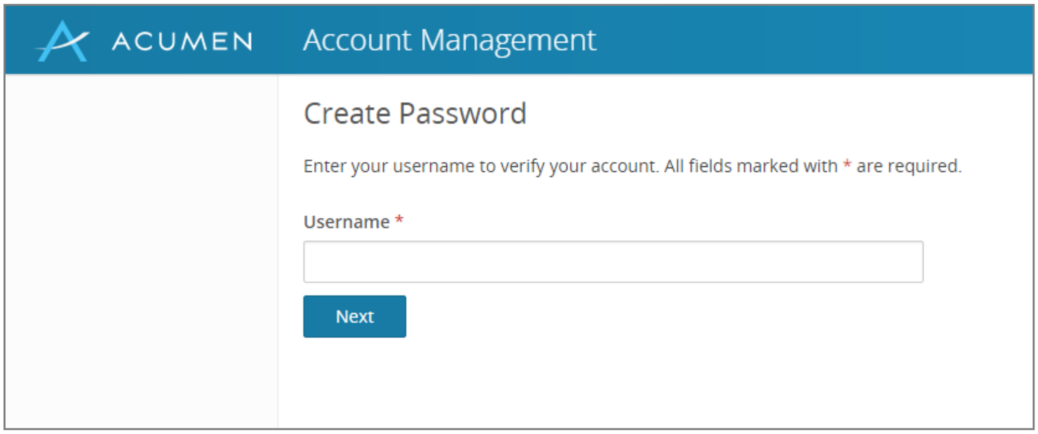
2.2 Initially Accessing the Account Management Web Portal

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



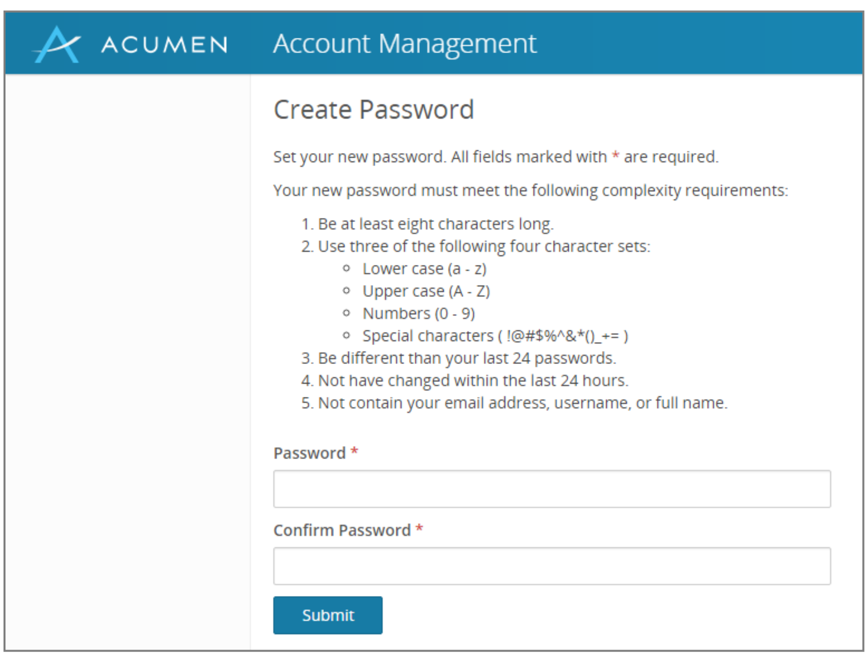
2.3 Creating Your New Password

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



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.

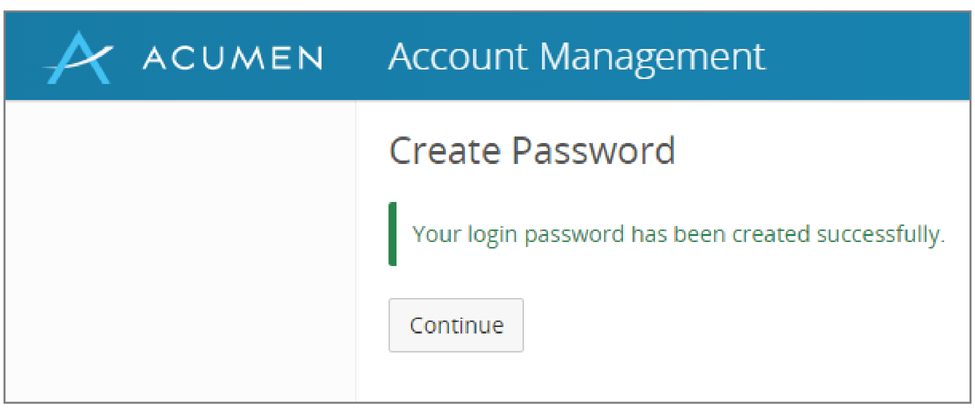
2 In the “Confirm Password” field, re-enter the password you just created.

3 Click the **Submit** button.

   The Password Created message loads.

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

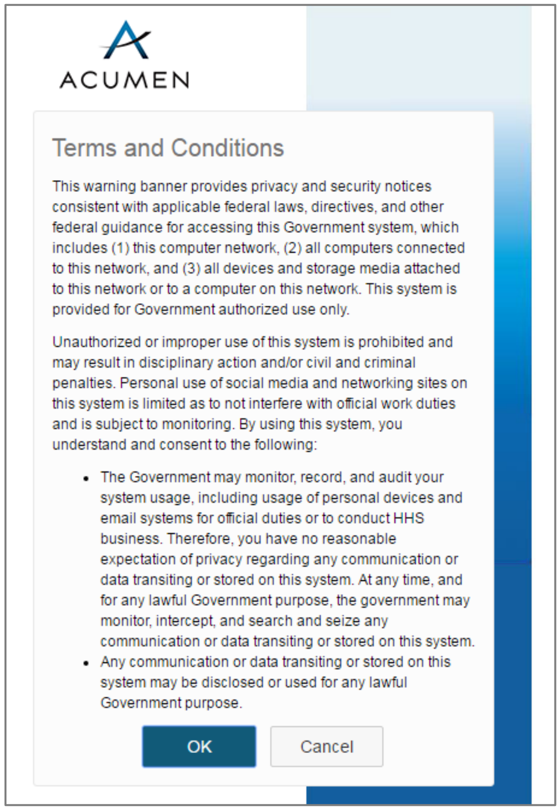
Figure 4. Password Created Message



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.

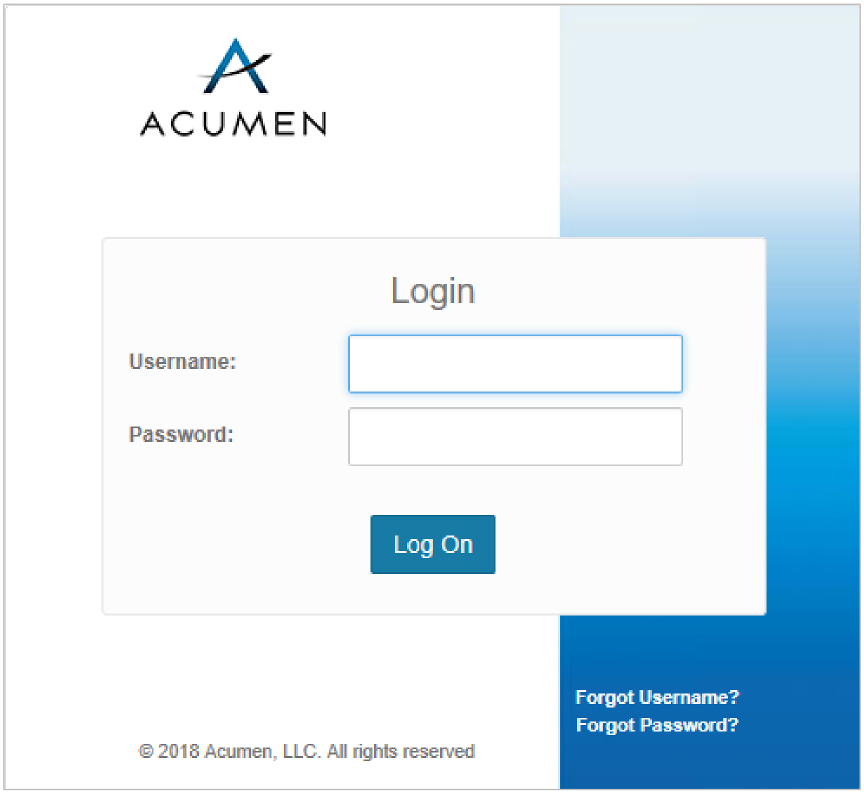
To log in to the Account Management Web Portal:

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.

Figure 6. Login Page



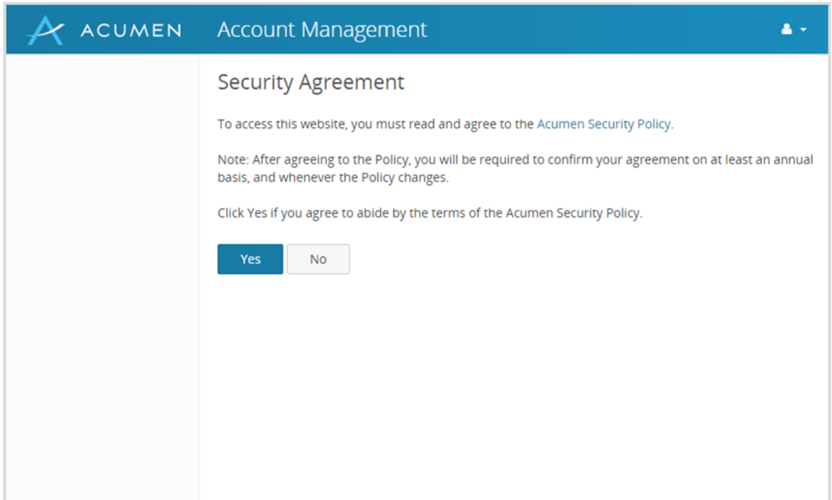
WARNING: If you inadvertently load an incorrect URL and access a Web Portal with a login page similar to—but different from—the Portal's Login page, do NOT enter your user credentials. Instead, contact Website Support (WebAssistance@AcumenLLC.com) immediately.

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



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.

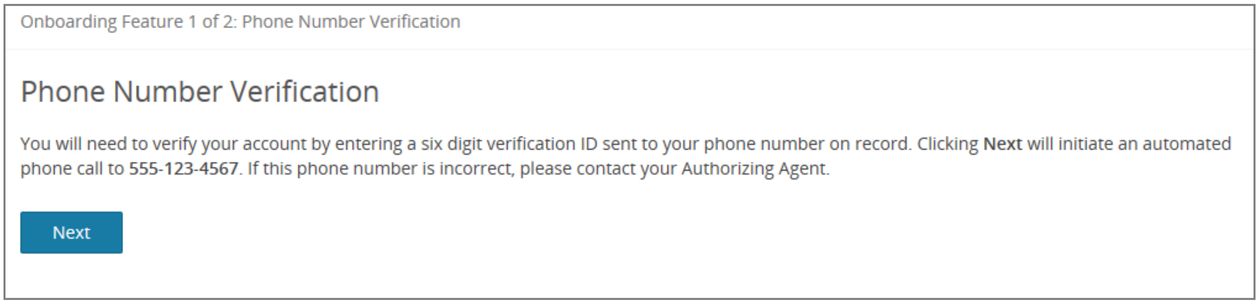
3. Click the **Yes** button.

   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:

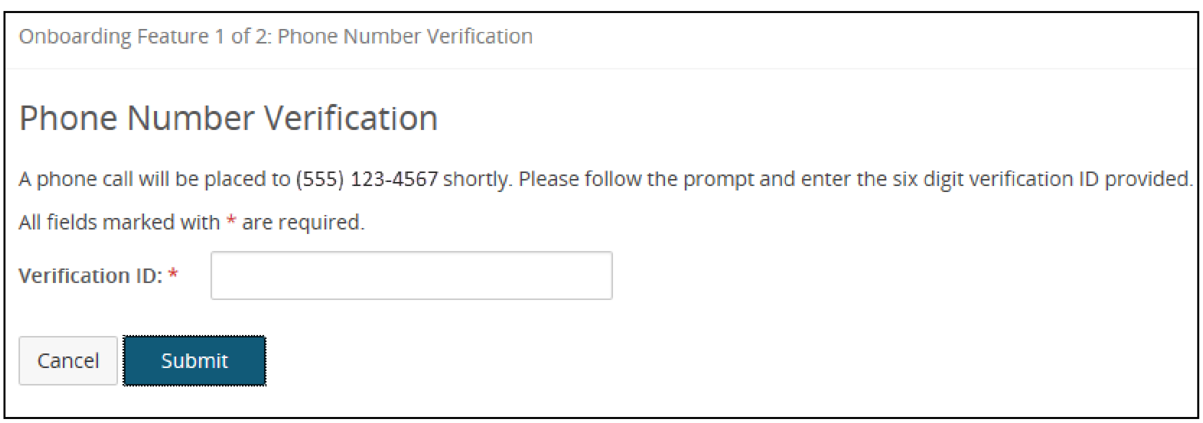
1. In the Phone Number Verification page (refer to Figure 8), read the listed phone number and ensure that it is correct.

   NOTE: If the phone number is incorrect, contact your authorizing agent[3].

2. Click the **Next** button.

   The Phone Number Verification Input page loads.

Figure 9. Phone Number Verification – Input Page



[3] For information on your authorizing agent, refer to the Glossary or contact Website Support (WebAssistance@AcumenLLC.com).

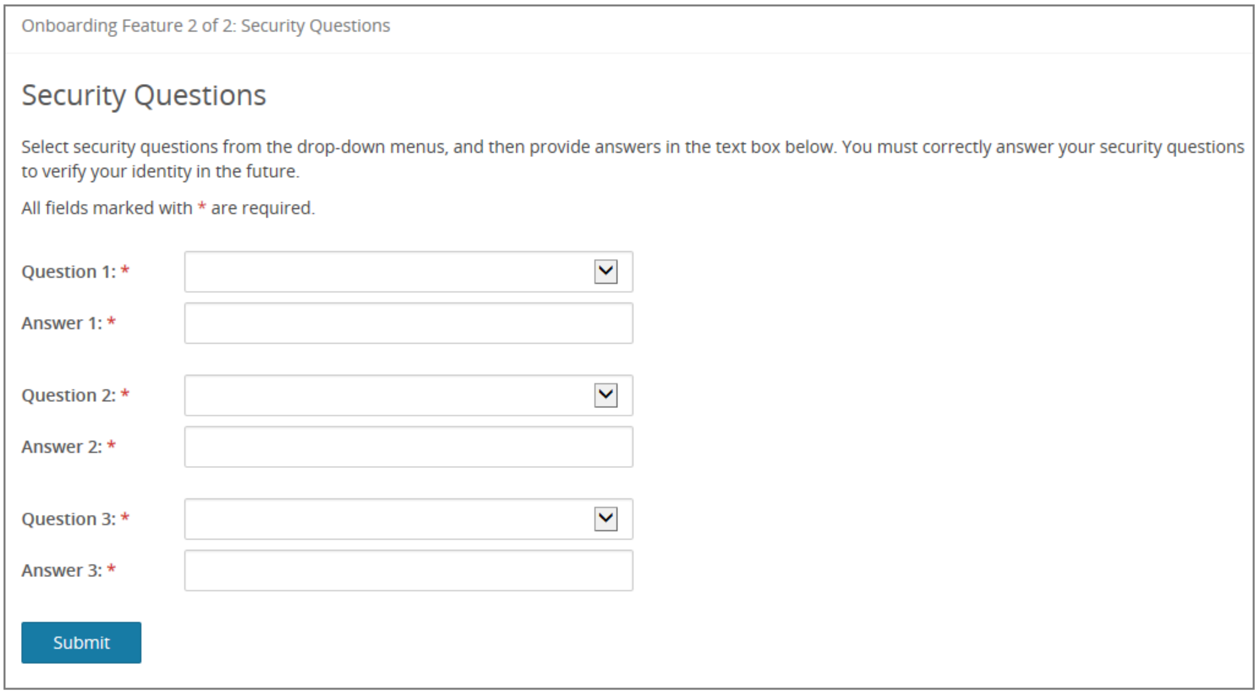
3 Answer the automated phone call you receive at the number listed on the Phone Number Verification page.

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



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.

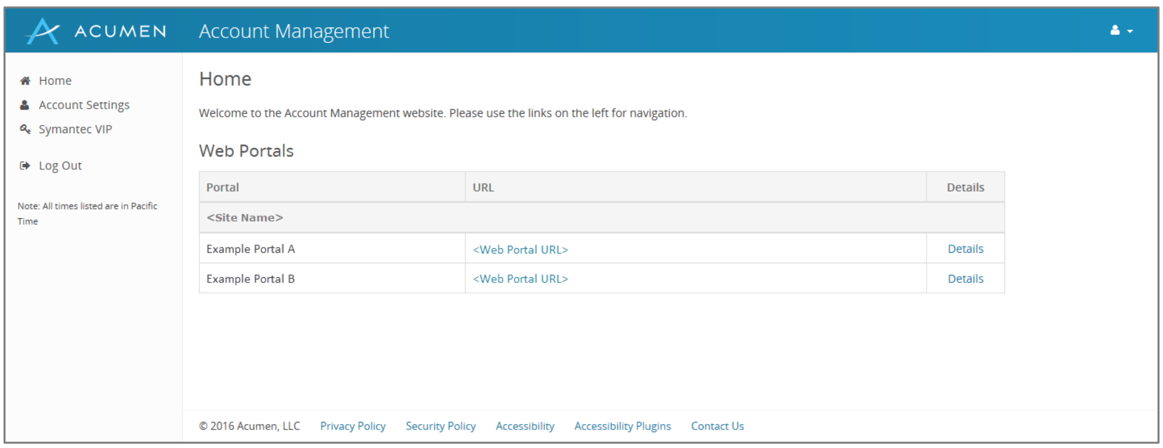
NOTE: The Web Portal factors spaces—but not case—into its validation of your online responses to your security questions. This means that if you were to enter the response “Jane Doe” in one of the answer fields, the Web Portal would accept “jane Doe,” “Jane doe,” “JANE DOE,” and “jane doe” but would 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.

Figure 11. Account Management Home Page



3 Login

After you configure your account, 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.

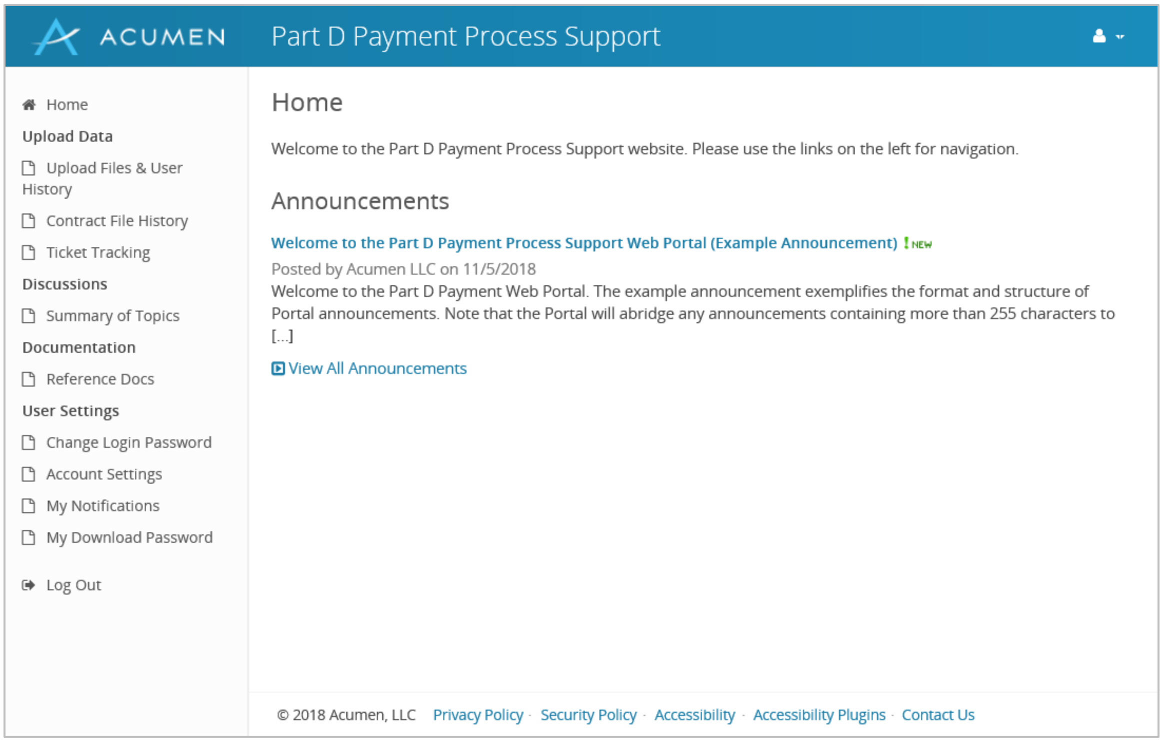
   NOTE: If you do not consent to the Terms and Conditions notice, you can click the **Cancel** button; however, doing so will prevent you from accessing the Web Portal.

   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 (WebAssistance@AcumenLLC.com) 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



NOTE: 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 Section 2.4 Agreeing to the Security Policy.

4 Announcements

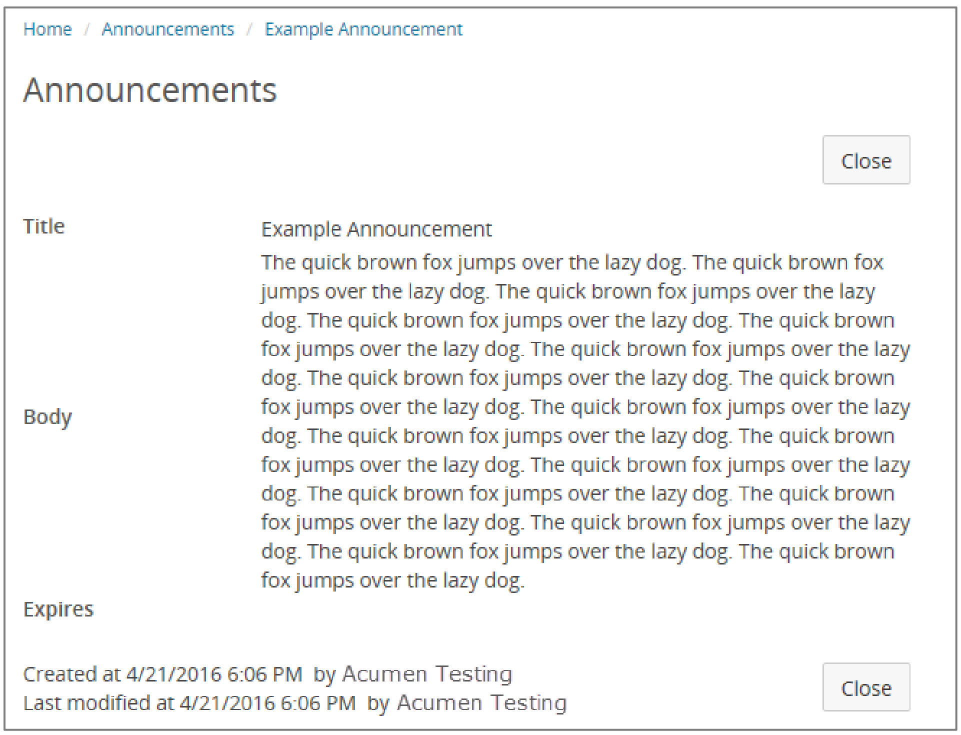
Acumen periodically posts announcements about the Payment Support project on the Home page. If an announcement contains more than 255 characters (or about 3 lines of text), the Portal will display an abridged version of it in the Home page and publish the full text in the announcement view.

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



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 spreadsheets[4]; (2) supporting documentation; and (3) additional information[5]. Table 3 describes each of these documents and provides submission instructions.

Table 3. Reopening Request Document Types

DOCUMENT TYPE	DESCRIPTION	SUBMISSION INSTRUCTIONS
Reopening Request Spreadsheet[4][4]	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.

[4] The reopening request spreadsheet template is located in the Portal's Reference Docs library. For instructions on downloading this template, refer to Section 7.1 Downloading a File From the Reference Docs Library.
[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 PartDPaymentSupport@AcumenLLC.com.

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.

Table 4. Reopening Request and Supporting Documentation Naming Conventions

DOCUMENT TYPE	NAMING CONVENTION	EXAMPLE(S)
ZIP file (must contain attestation)	[Parent Org ID]_[CalendarYear]_EGWP_attest.zip	123_2014_EGWP_attest.zip
Attestation (must be included in ZIP file)	[Parent Org ID]_[CalendarYear]_EGWP_attest.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

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

NOTE: The "FileNumber" is a number you assign to distinguish between different files within the ZIP file.

TIP: Your Parent Org ID or "PO ID" is determined by the Health Plan Management System (HMPS). Refer to HPMS for this information.

TIP: You can find a request's Ticket Number on the Ticket Tracking page.

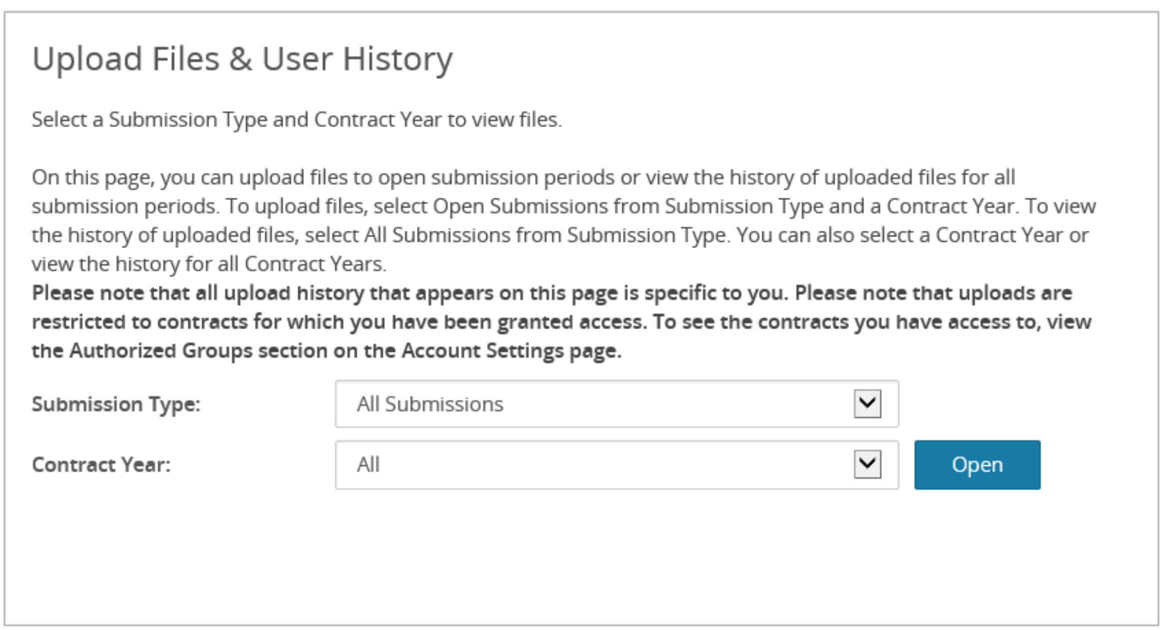
5.2 Uploading Files Related to a Contract

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



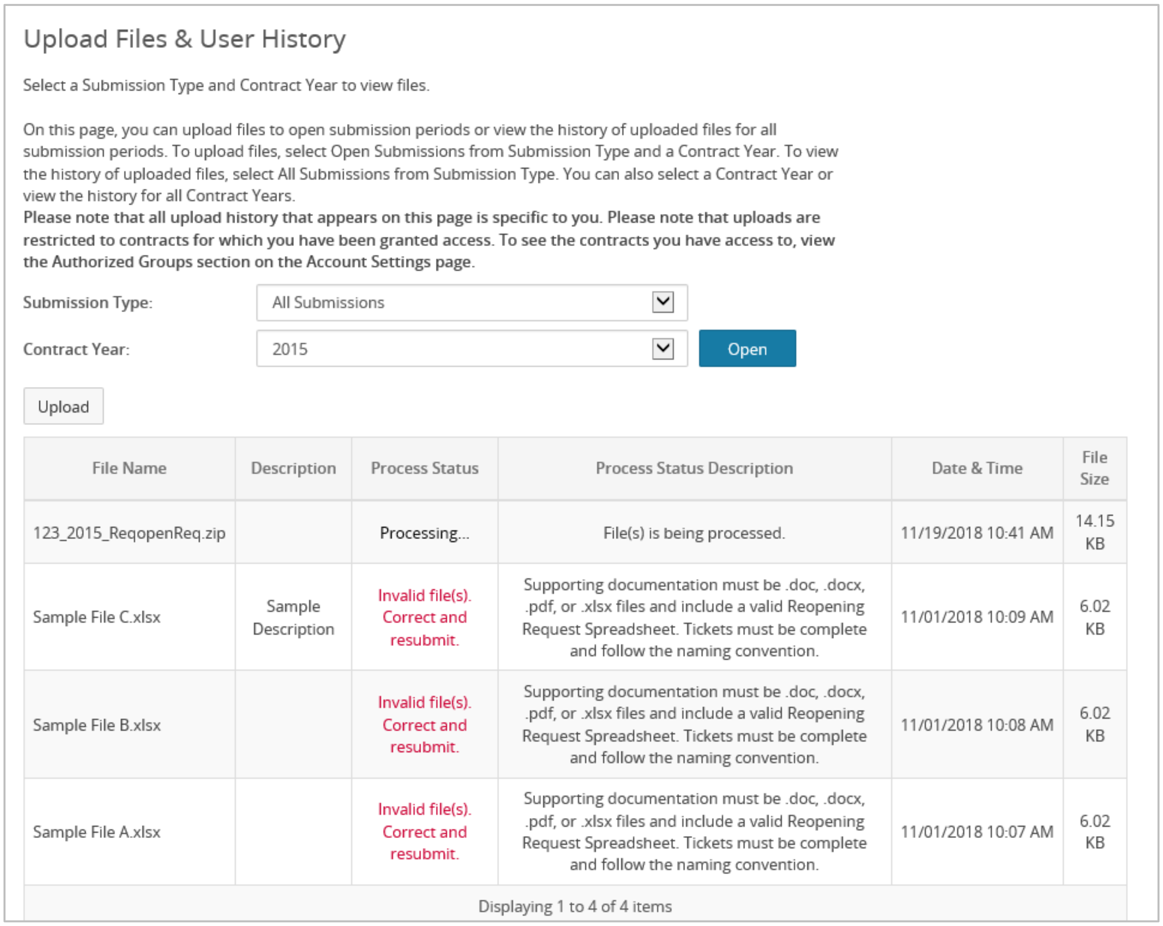
2. In the "Submission Type:" drop-down menu, select **Open Submissions.**

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.

Figure 15. Upload Files & User History Page – Table View



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

Contract Year: 2015 Open

Upload

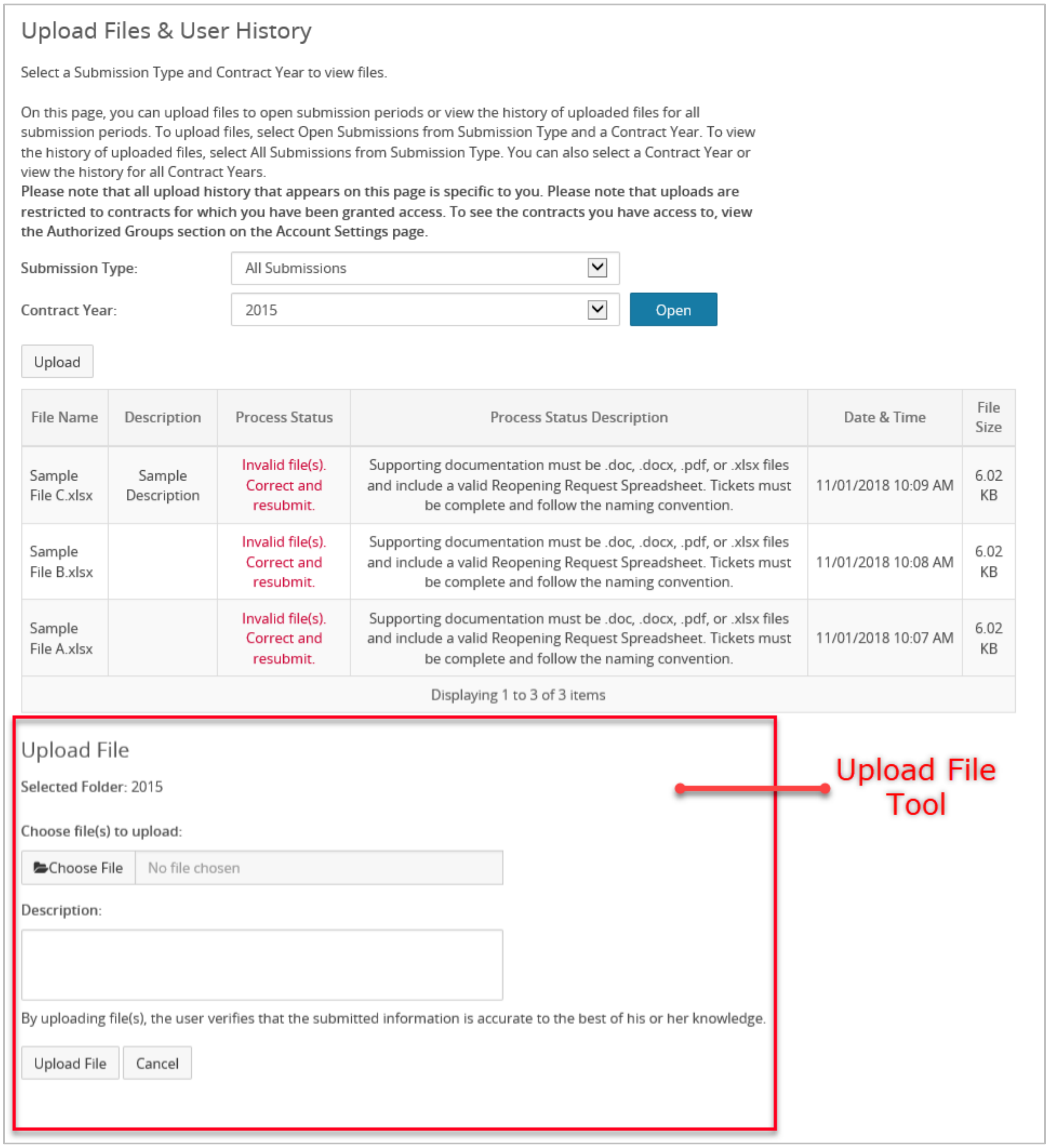
File Name	Description	Process Status	Process Status Description	Date & Time	File Size
123_2015_ReqopenReq.zip		Processing...	File(s) is being processed.	11/19/2018 10:41 AM	14.15 KB
Sample File C.xlsx	Sample Description	Invalid file(s). Correct and resubmit.	Supporting documentation must be .doc, .docx, .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



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 5.1 Preparing 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 Appendix B Upload Process Statuses.

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).

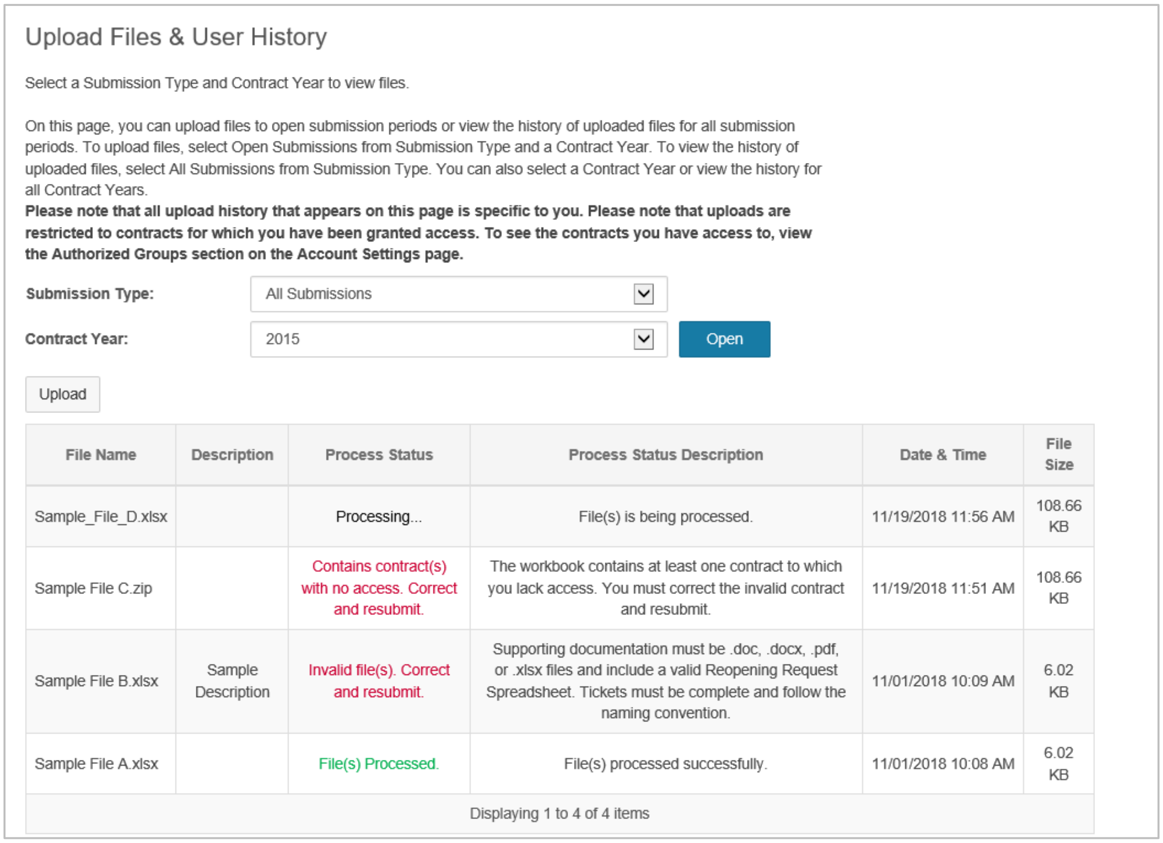
2 In the "Submission Type:" drop-down menu, select the submission type you would like to view.

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.

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



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

Contract Year: 2015 Open

Upload

File Name	Description	Process Status	Process Status Description	Date & Time	File Size
Sample_File_D.xlsx		Processing...	File(s) is being processed.	11/19/2018 11:56 AM	108.66 KB
Sample File C.zip		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.	11/19/2018 11:51 AM	108.66 KB
Sample File B.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 A.xlsx		File(s) Processed.	File(s) processed successfully.	11/01/2018 10:08 AM	6.02 KB

Displaying 1 to 4 of 4 items

NOTE: This table displays only your successful and failed uploads. To view all successful uploads to a contract, access contract file history.

5.4 Accessing Contract File History

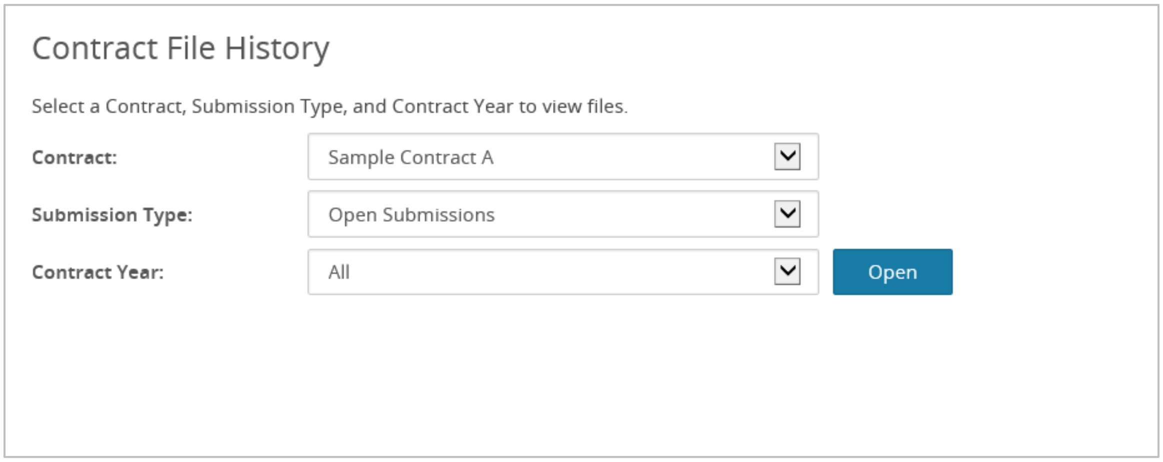
The Contract File History page enables users to view all successful uploads to a specific contract.

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



2 In the "Contract:" drop-down menu, select the contract you would like to view.

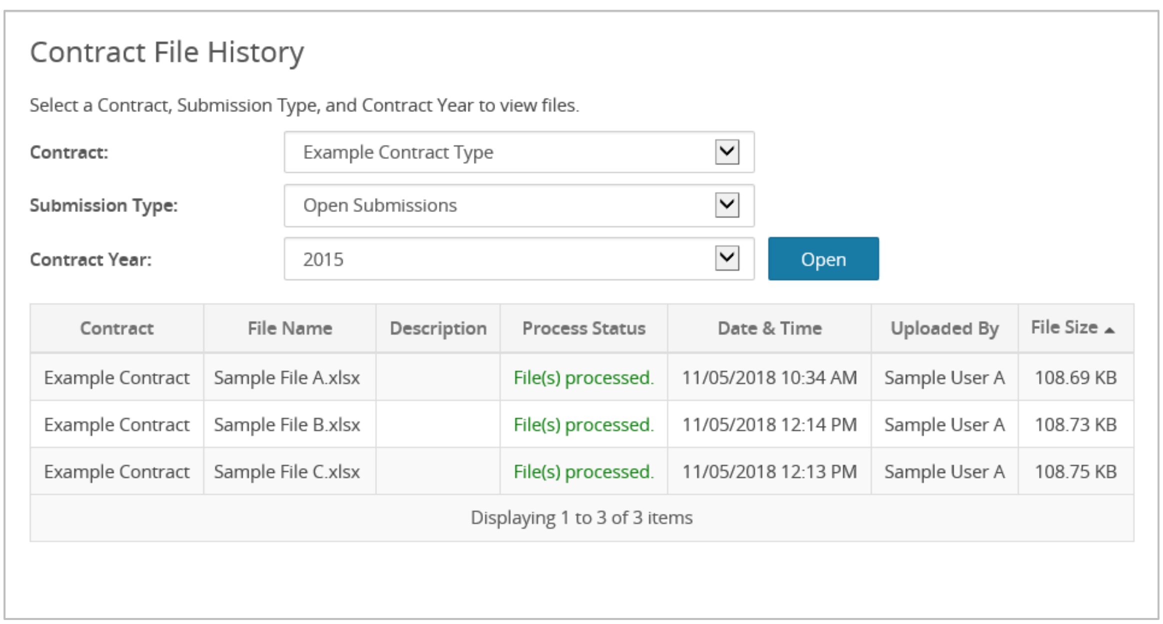
3 In the "Submission type:" drop-down menu, select the submission type you would like to view.

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.

Figure 19. Contract File History Page – Filter Criteria



Contract	File Name	Description	Process Status	Date & Time	Uploaded By	File Size ▲
Example Contract	Sample File A.xlsx		File(s) processed.	11/05/2018 10:34 AM	Sample User A	108.69 KB
Example Contract	Sample File B.xlsx		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

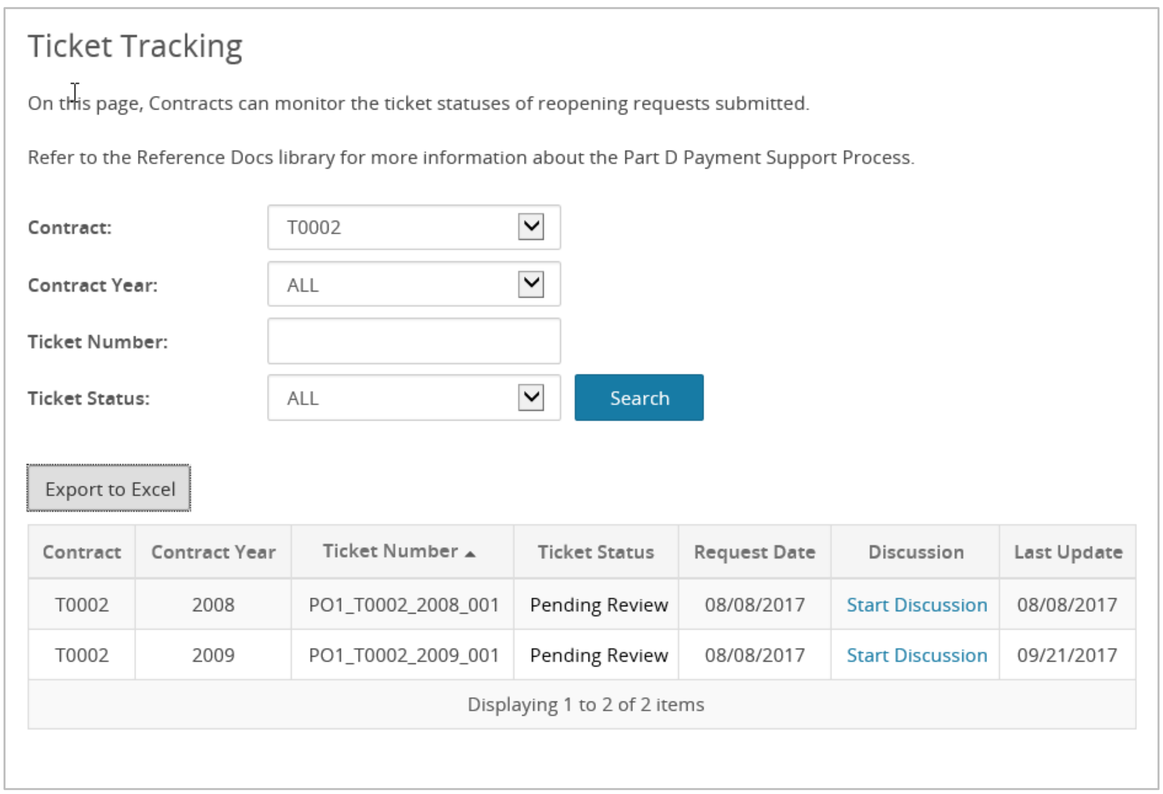
TIP: To redisplay all files, ensure that every drop-down tool displays the ALL option, then click the **Open** button.

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 Appendix C Ticket Tracking Statuses.

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 data-entry 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 Appendix E Ticket Tracking: Search Tools.

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 Search for the ticket 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 Section 6.5.2 Creating a Discussion Thread steps 3 – 7. To reply to an existing discussion thread, refer to Section 6.5.4 Replying to a Discussion Post.

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:

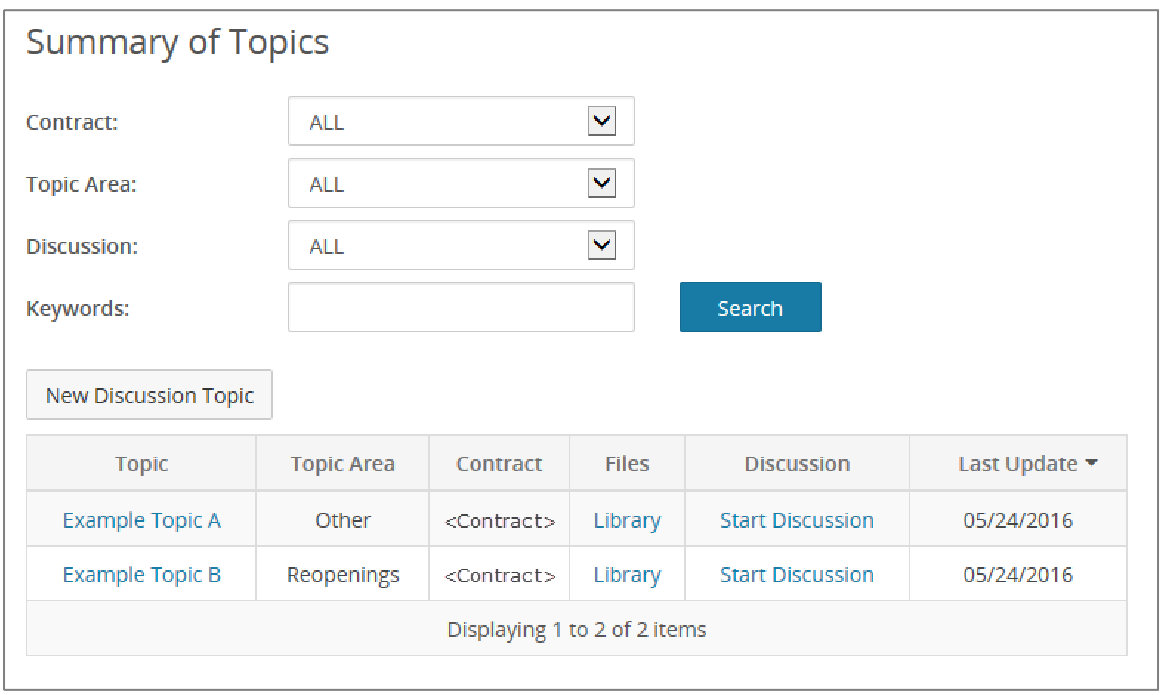
- access summaries of all the topics currently available to you (Summary of Topics);
- create a new topic specifying new project activities (New Discussion Topic)
- access an overview of a specific topic (Topic Details);
- download and upload confidential topic documents (Topic Library); and
- discuss 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.

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 agent[6].

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 (WebAssistance@AcumenLLC.com).

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

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 (PartDPaymentSupport@AcumenLLC.com).

To create a new topic:

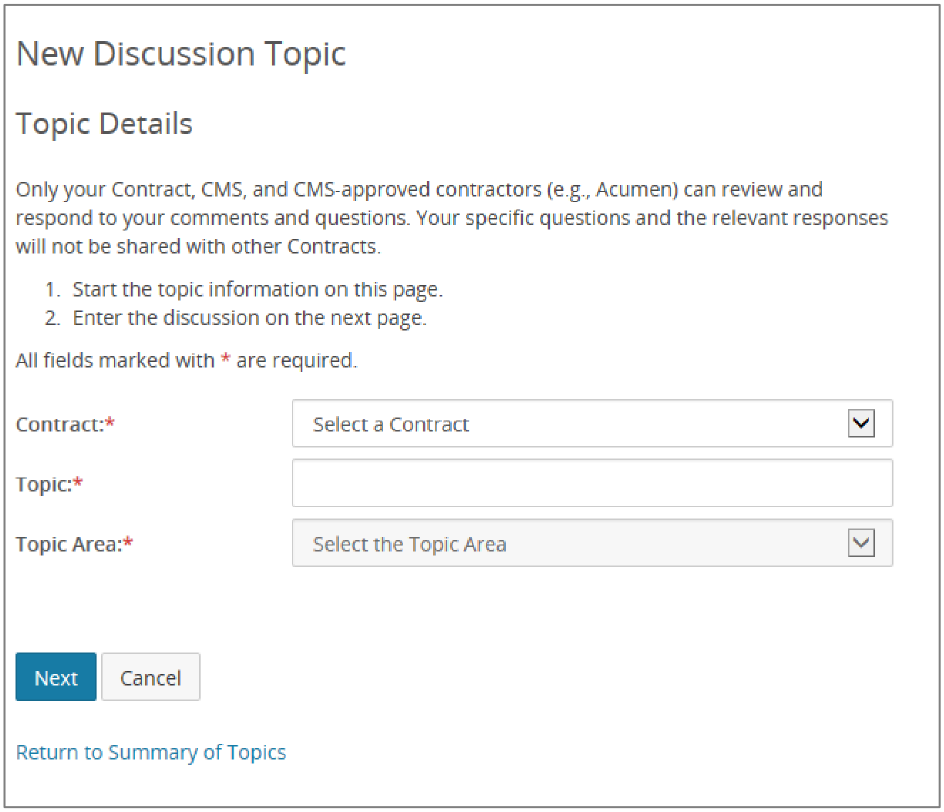
1. In the Navigation pane, click **Summary of Topics**.

   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



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.

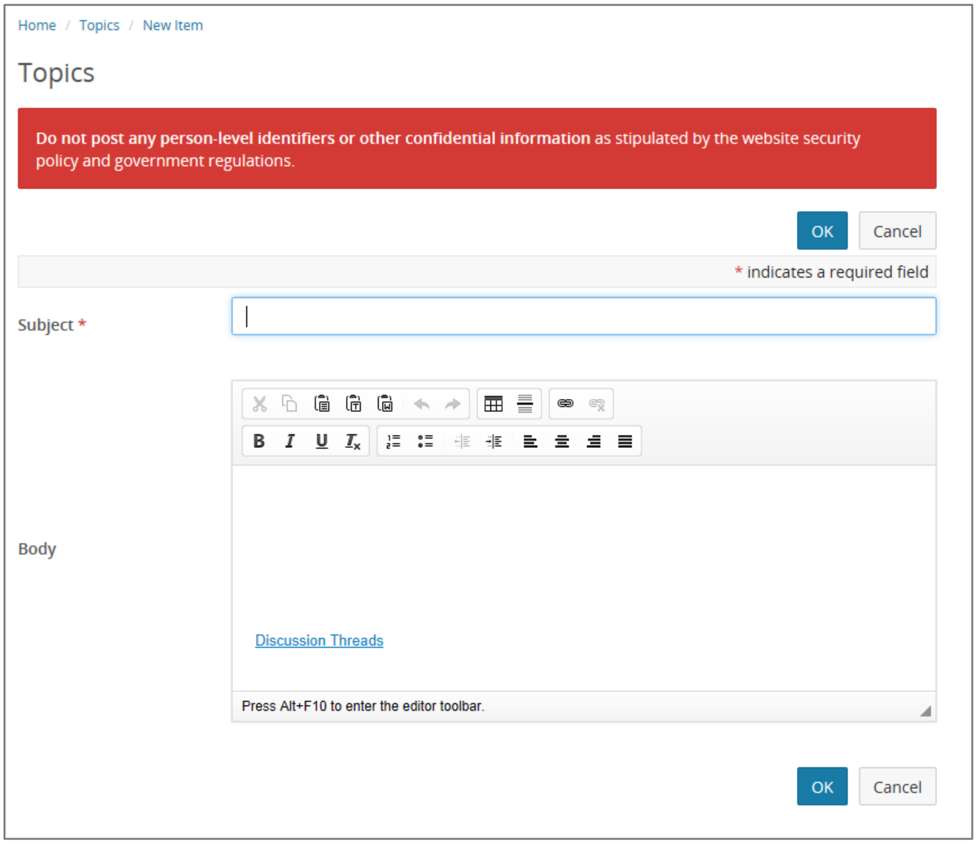
TIP: We recommend creating descriptive but concise topic names.

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.

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.

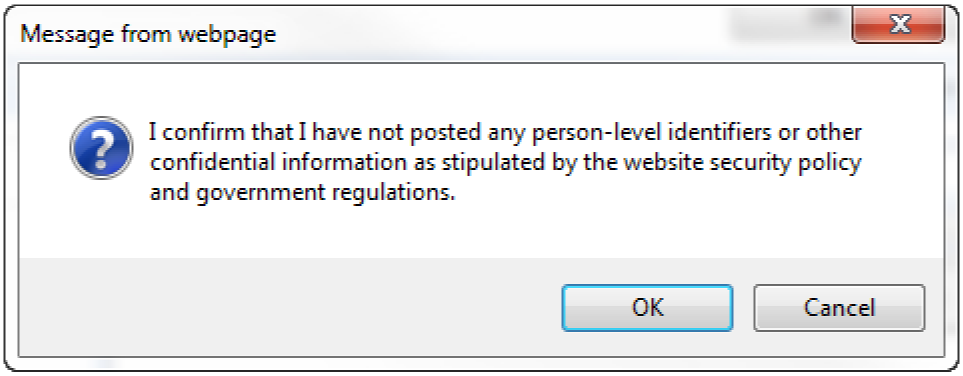
NOTE: Once you submit your post, the **Discussion Threads** link will enable you and other users within your user group to link to the Discussion page from the thread directly.

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



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 Section 6.5.3 Accessing a Discussion Thread 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

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 Search for the topic 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.

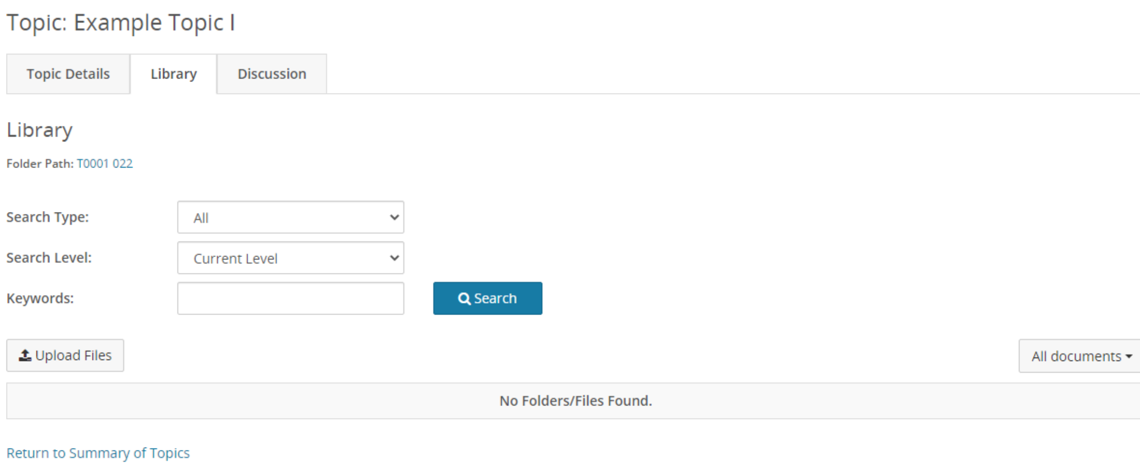
3 In the "Topic Name" column, click the topic name.

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



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. Search for the topic 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. Access the Library page 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 Section 8.4 Acquiring Your Download Password).

To download a file from a Library page:

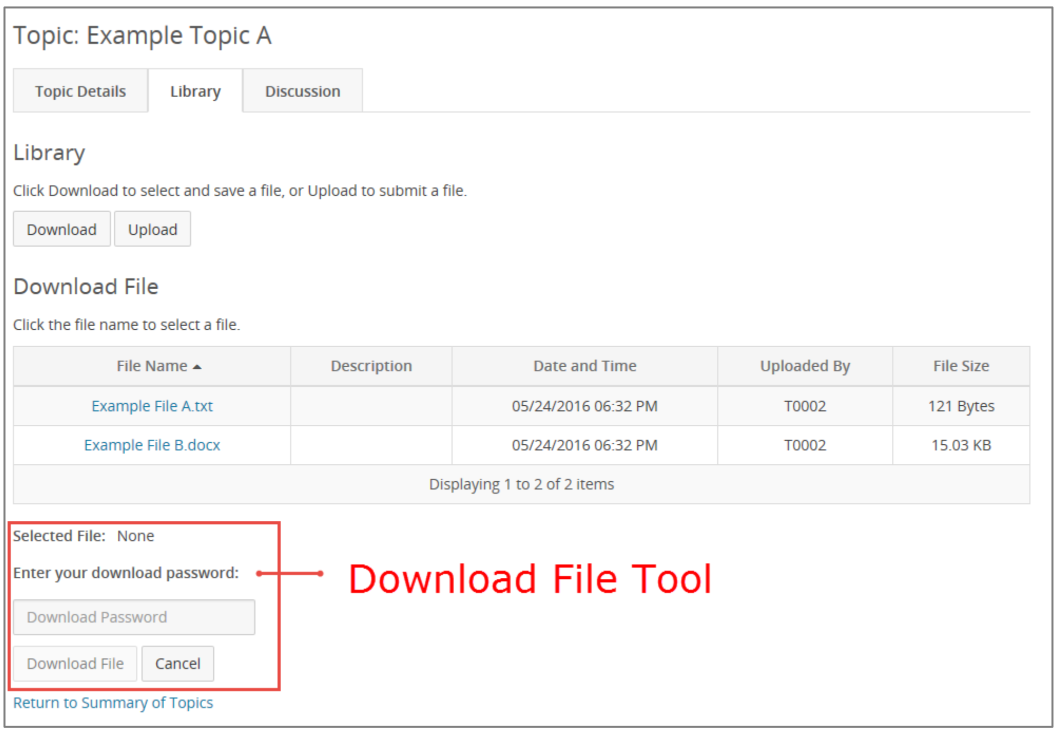
1 Access the Library page for the topic you want to download a file from.

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.

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.

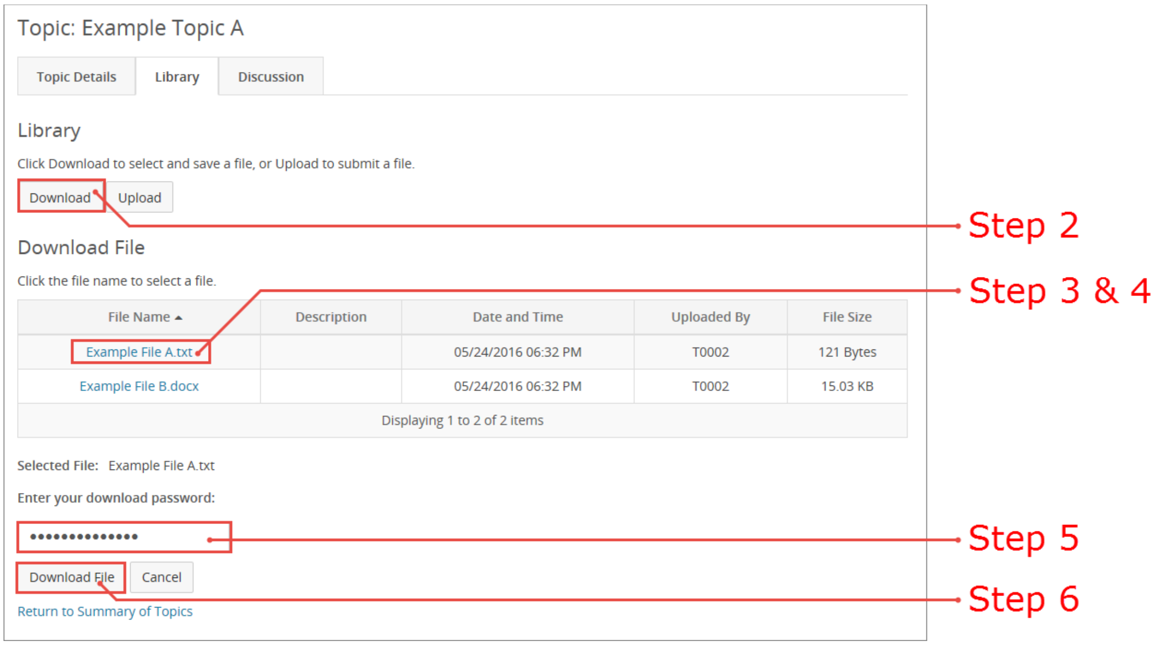
The “Selected File:” field displays the file name.

5 In the password field, enter your download password.

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

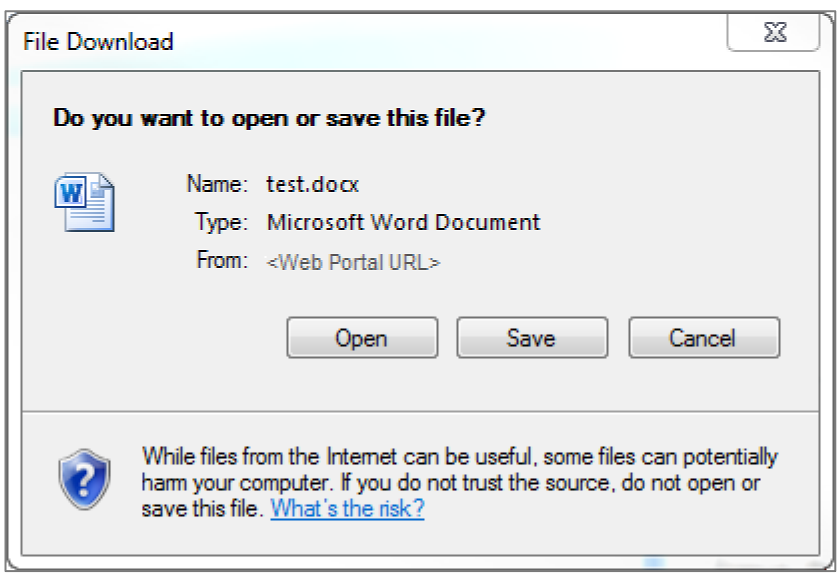
6 At the base of the page, click the **Download File** button.

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



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 are actively using the page.

6.4.4 UPLOADING A TOPIC-RELATED FILE

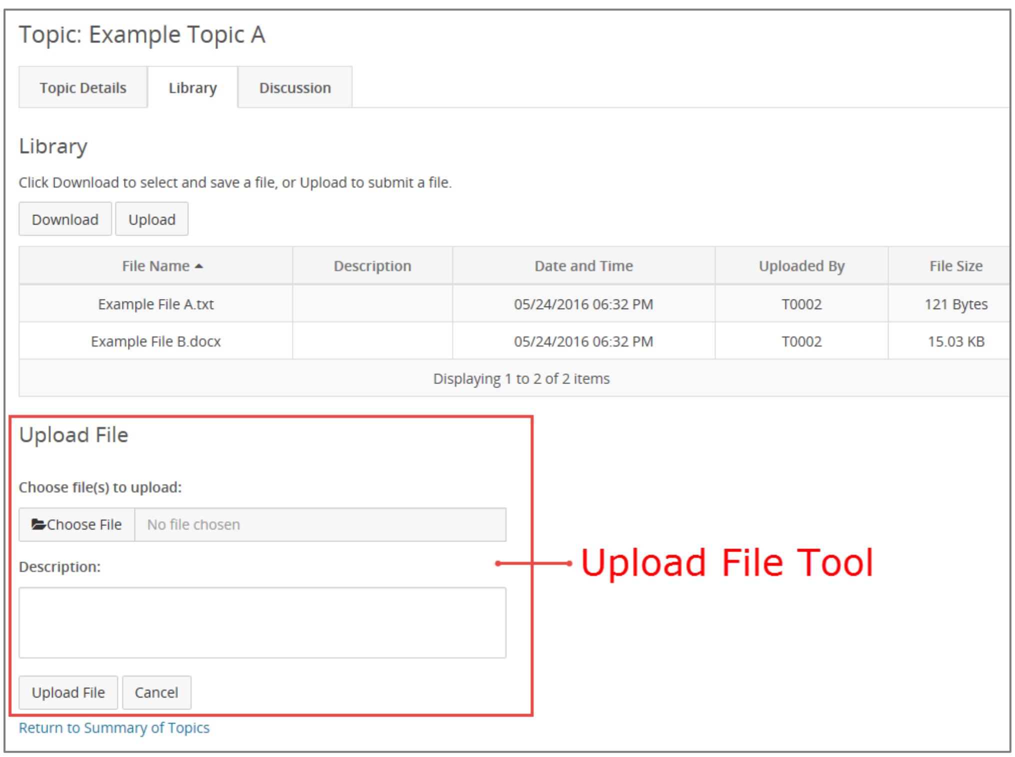
To upload a file to a Library page:

1 Access the Library page 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.

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.

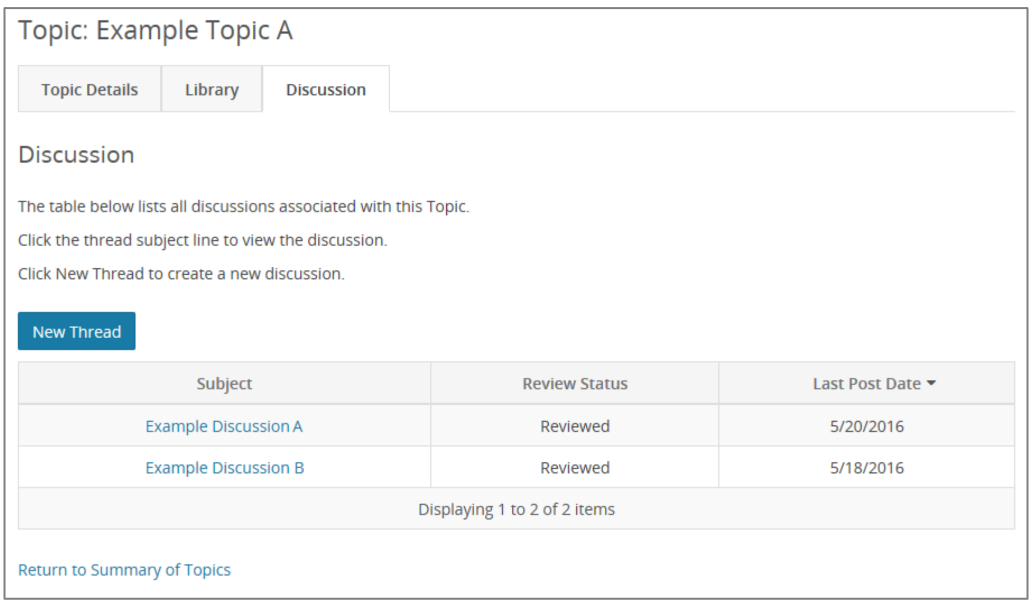
7 At the base of the page, click the **Upload File** button.

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.”

Figure 31. Example Discussion Page



Note that you can establish discussion thread notifications through the Setting Email Notifications page.

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 Search for the topic 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.

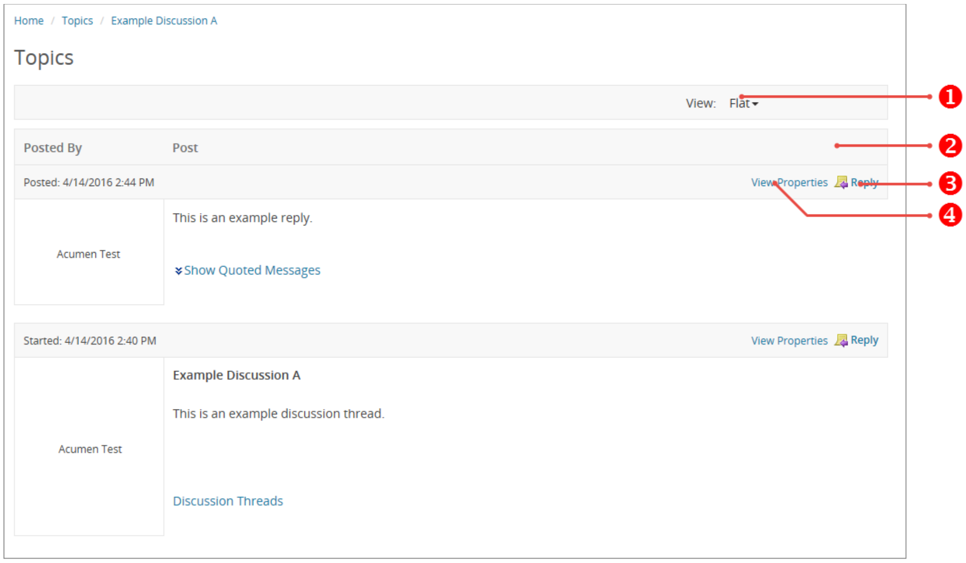
TIP: You can enter all or part of a discussion thread's subject in the "Search:" field and click the **Search** button to rapidly locate a thread; if you do so and subsequently need to clear your search, remove all text from the "Search:" field and click the **Search** button.

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.

Figure 32. Example Discussion Thread



❶ View Menu ❸ Reply Link
❷ Threading Column Header ❹ 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.

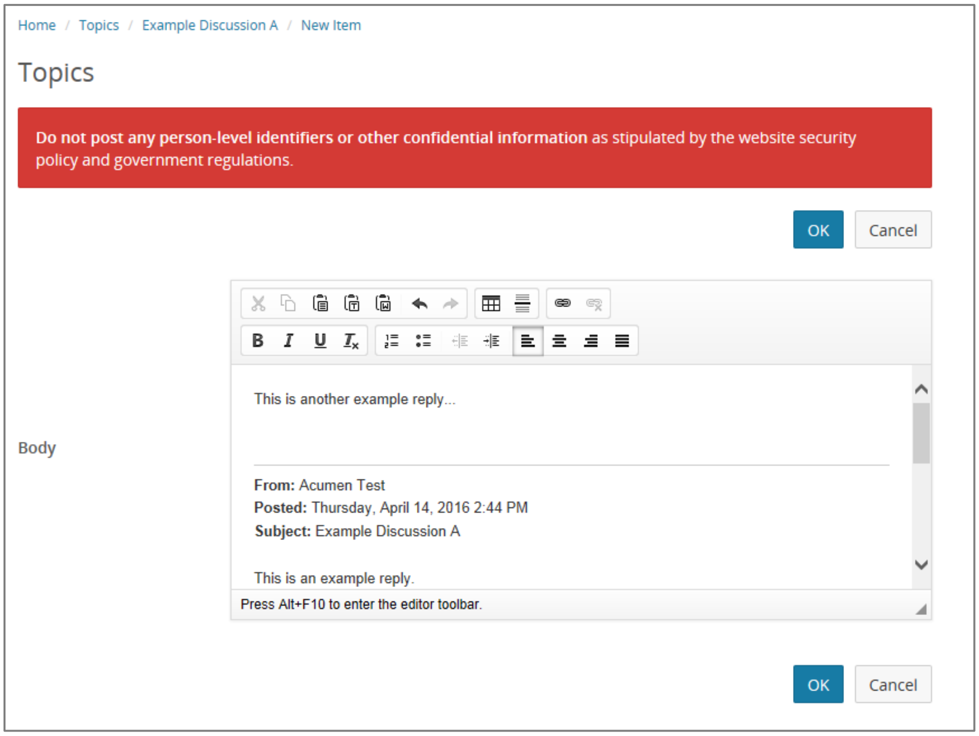
6.5.4 REPLYING TO A DISCUSSION POST

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.

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 unreviewed[7] thread as reviewed.

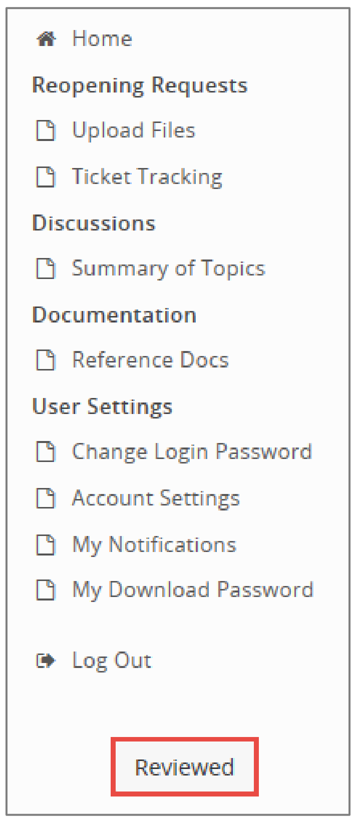
Note that the Web Portal only displays the Reviewed button for unreviewed threads; as such, you must select an unreviewed thread in order to access and use the button.

To do so:

1 [Access the discussion thread]() 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.

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

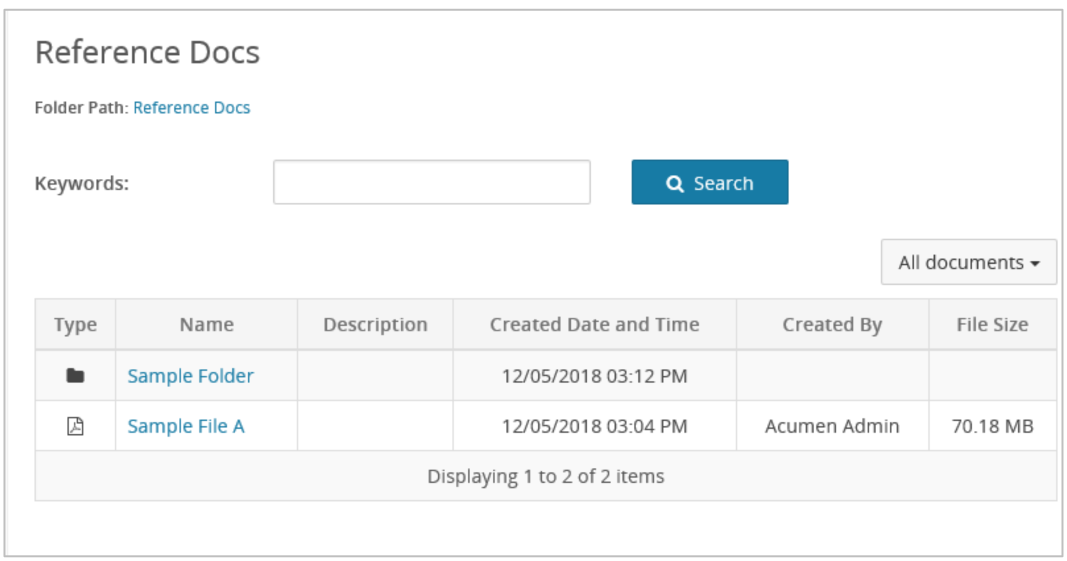
The Reference page contains a search tool for filtering the reference library to those files and/or folders matching your keywords.

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.

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

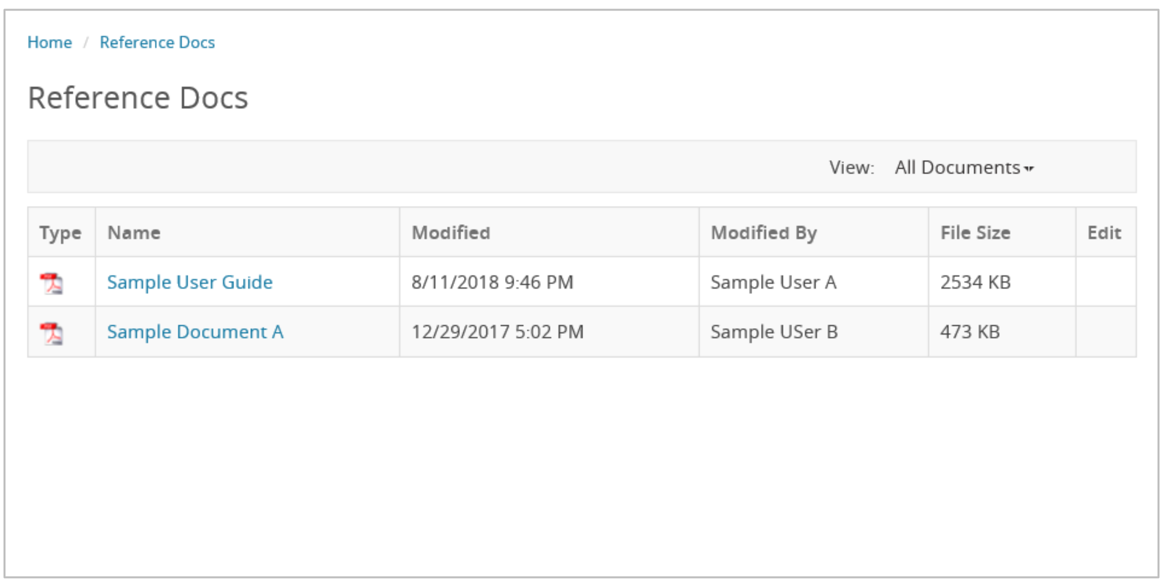
Please note that you can only download library files one at a time.

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.

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 file-compatible 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.

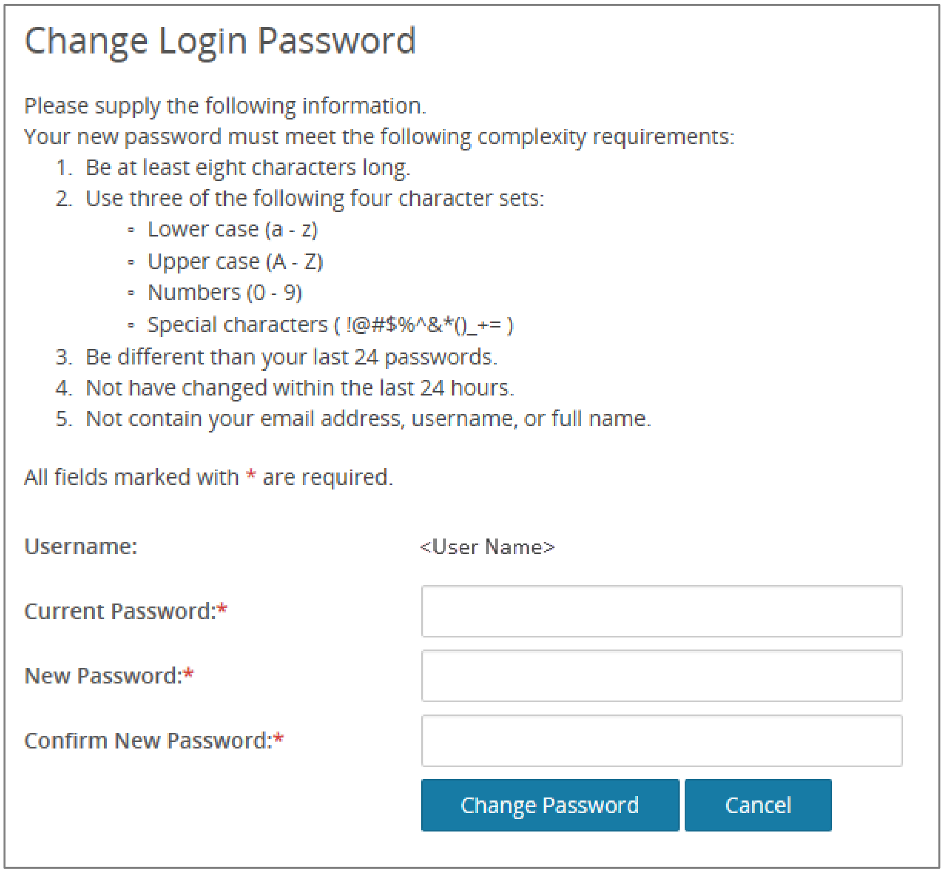
Please note that if you do not modify your password before the 60-day deadline, the Web Portal will prompt you to change your password upon your next log in. However, you CANNOT change your login password more than once in a 24-hour period.

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



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.

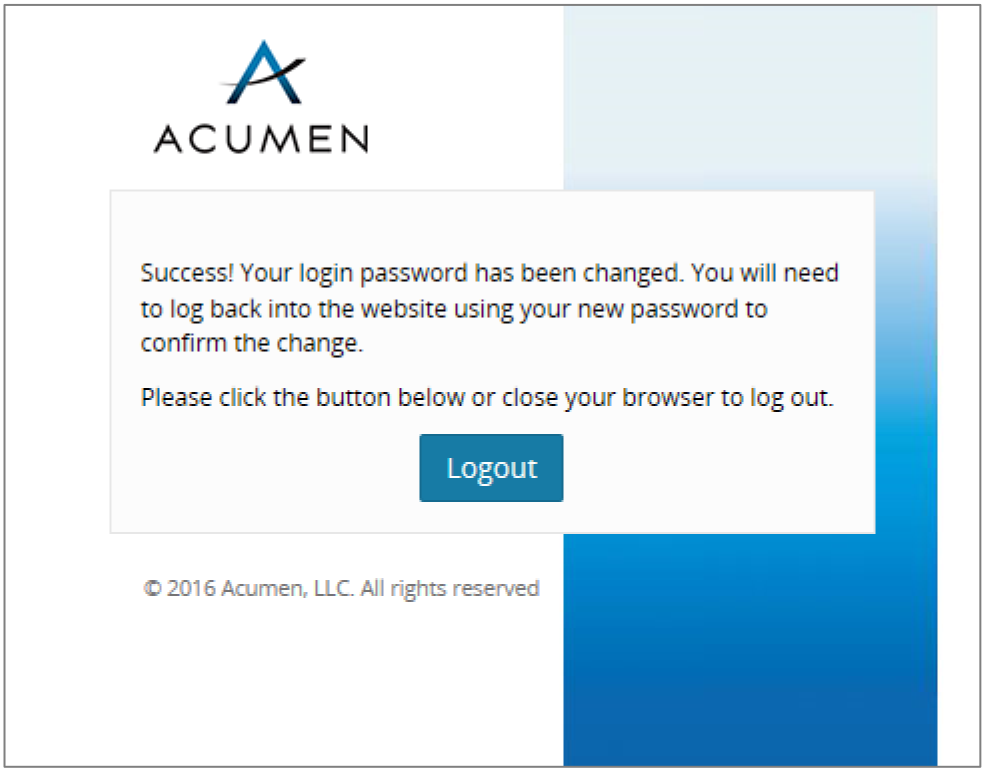
e. Does not contain your email address, username, or full name.

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.

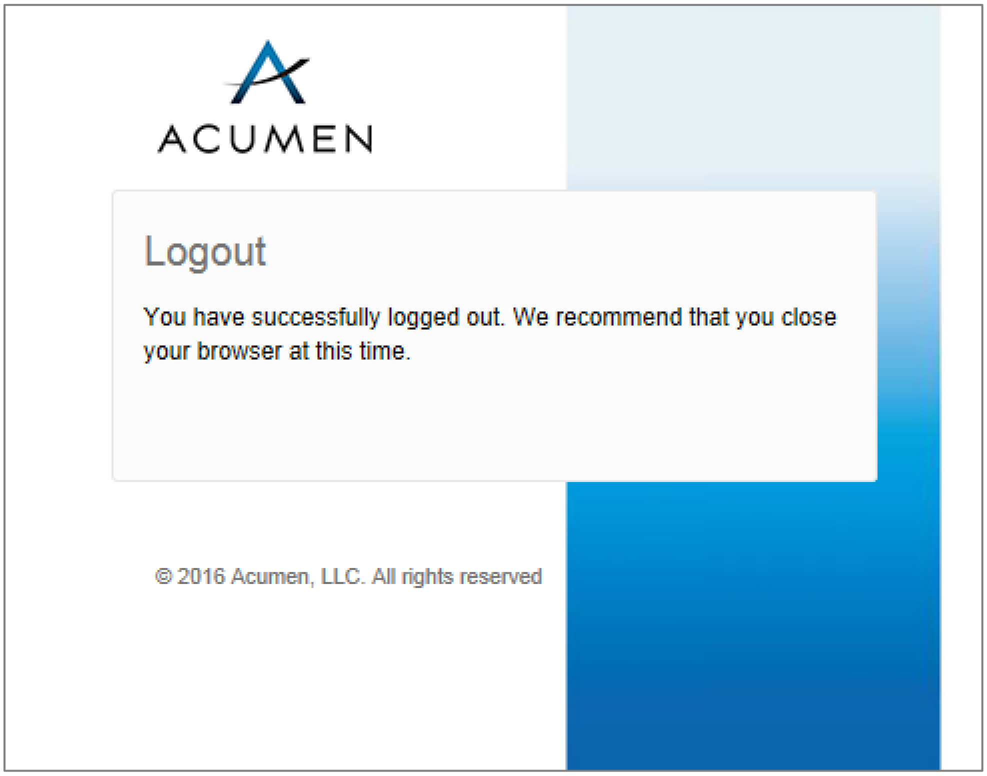
Figure 38. Successful Password Change Message



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.

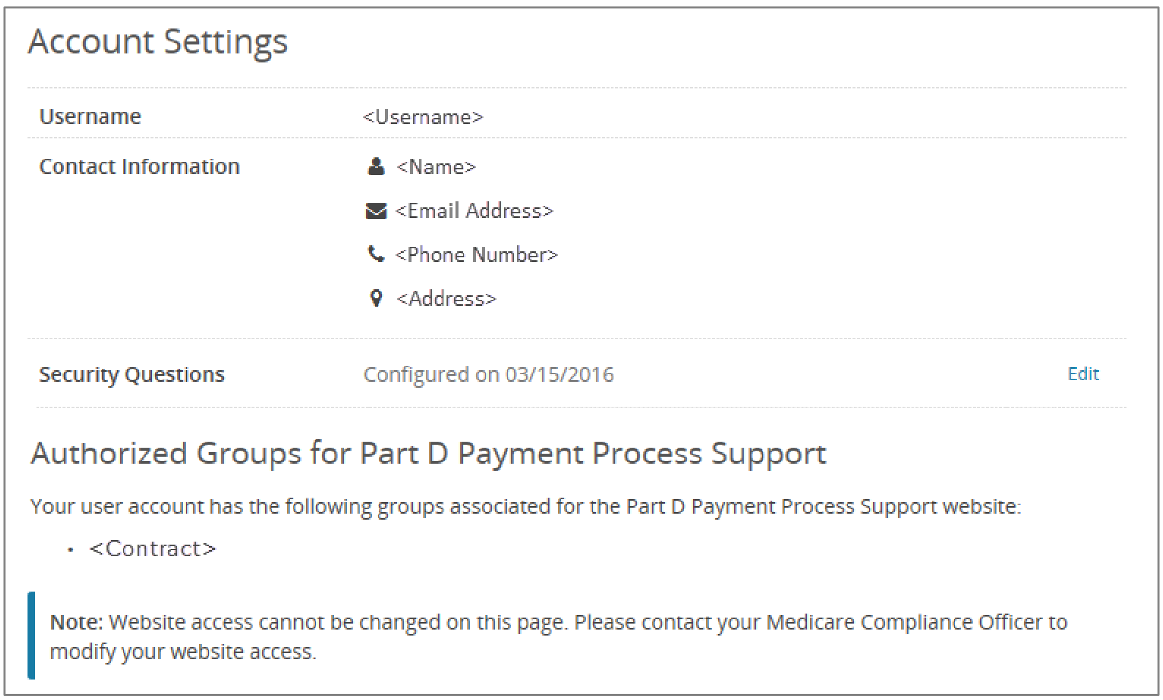
Note that you cannot change or update your contact information through the Account Settings page. To do so, you must contact your authorizing agent[8].

To do so:

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

The Account Settings page loads.

Figure 40. Account Settings Page

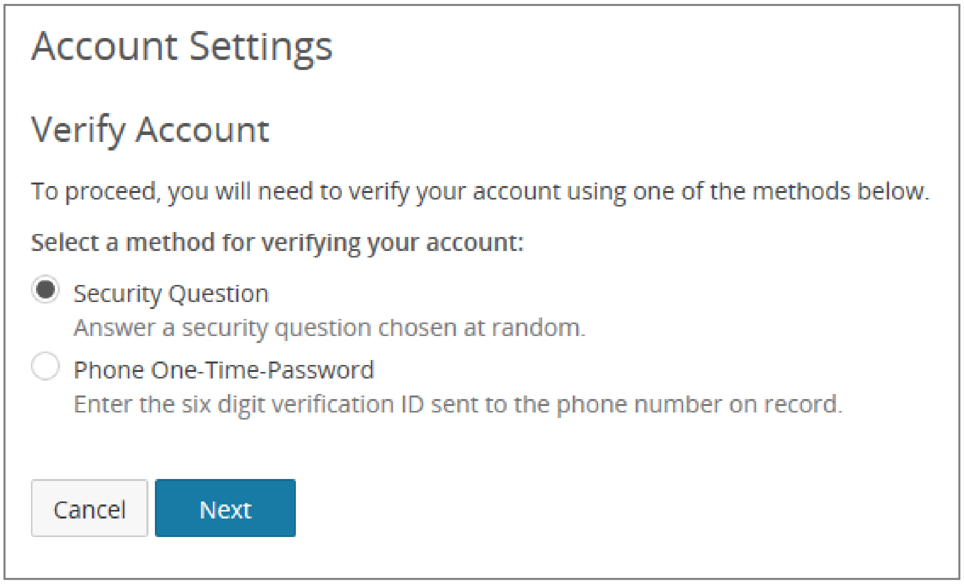


2 In the Security Questions row, click the **Edit** link.

The Account Settings – Verify Account Page loads.

[8] For information on your authorizing agent, refer to the Glossary or contact Website Support (WebAssistance@AcumenLLC.com).

Figure 41. Account Settings – Verify Account Page

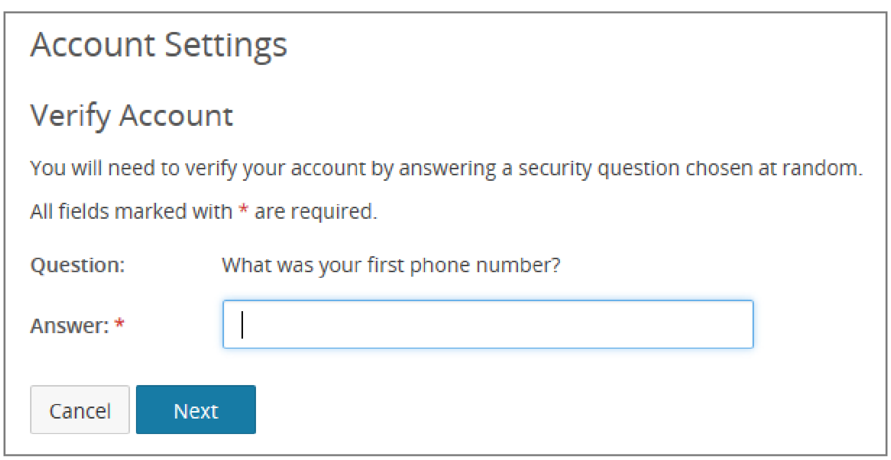


NOTE: You may choose one of two options for account verification: (1) answering a security question or (2) phone verification. These instructions will describe the process following option 1. For phone verification instructions, refer to Section 2.5 Phone Number Verification.

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

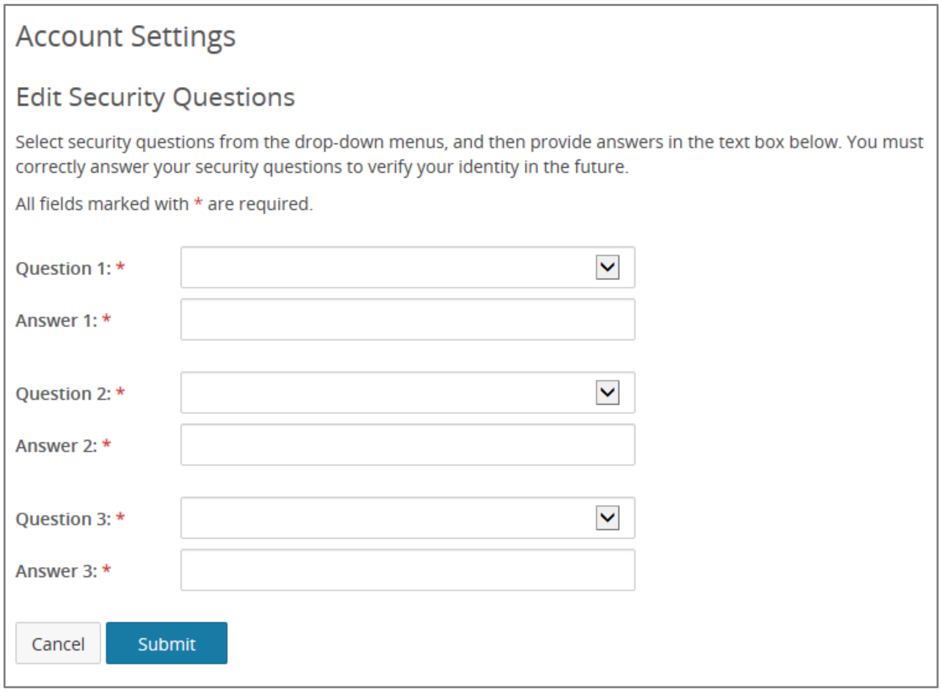


4 In the "Answer:" field, enter the answer to the security question.

5 Click the **Next** button.

The Edit Security Questions page loads.

Figure 43. Edit Security Questions Page



6 For each of the question drop-down menus, expand the menu and select a security question.

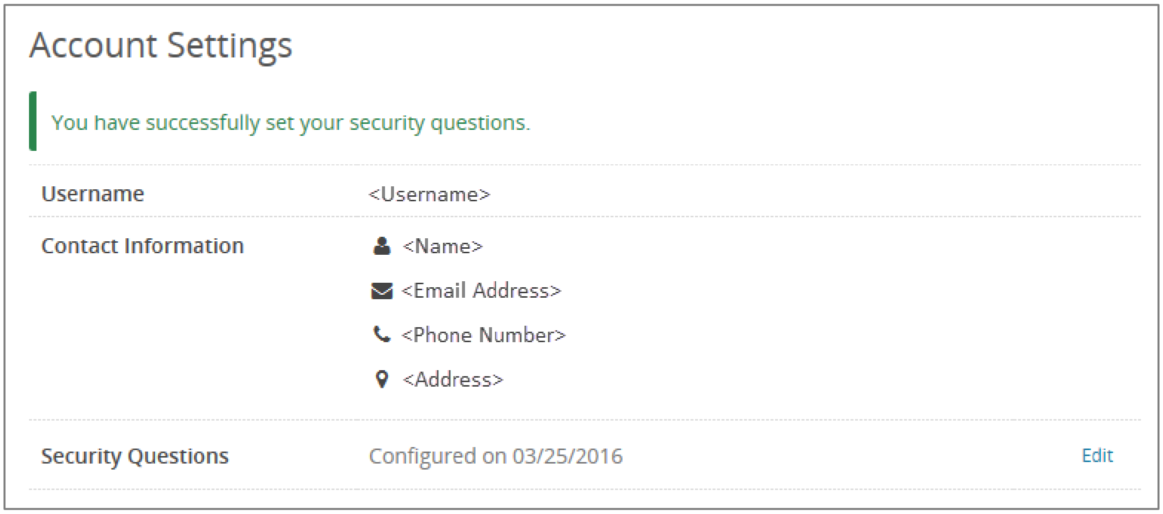
7 In the answer field corresponding to a selected question, enter a response.

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.

Figure 35~~43~~. Successful Security Question Change Message



8.3 Setting Email Notifications

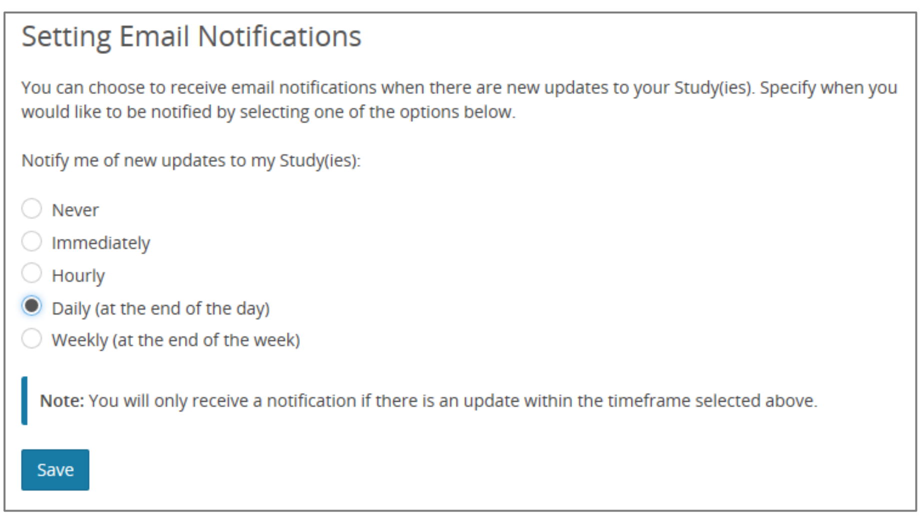
The Setting Email Notifications page enables you to set email notifications for newly created topics as well as existing topic activities.

To do so:

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

   The Setting Email Notifications page loads.

Figure 36~~44~~. Setting Email Notifications Page



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.

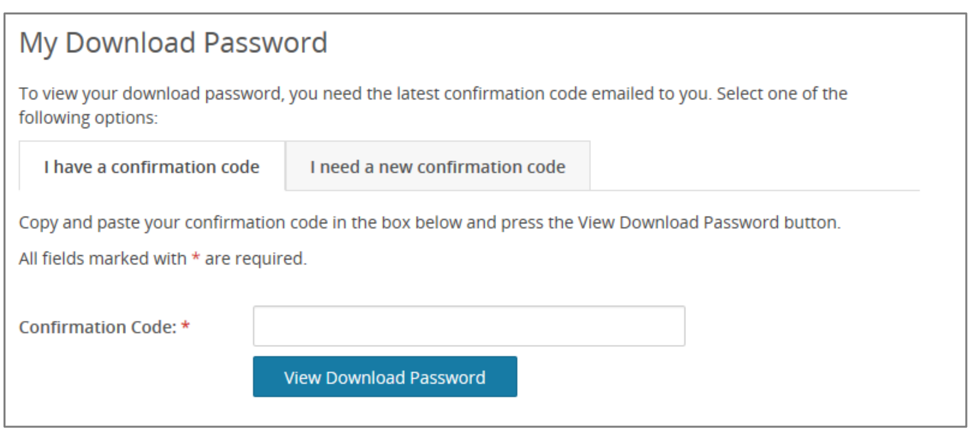
8.4.1 ACQUIRING YOUR CONFIRMATION CODE

To acquire a confirmation code:

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

The My Download Password page loads.

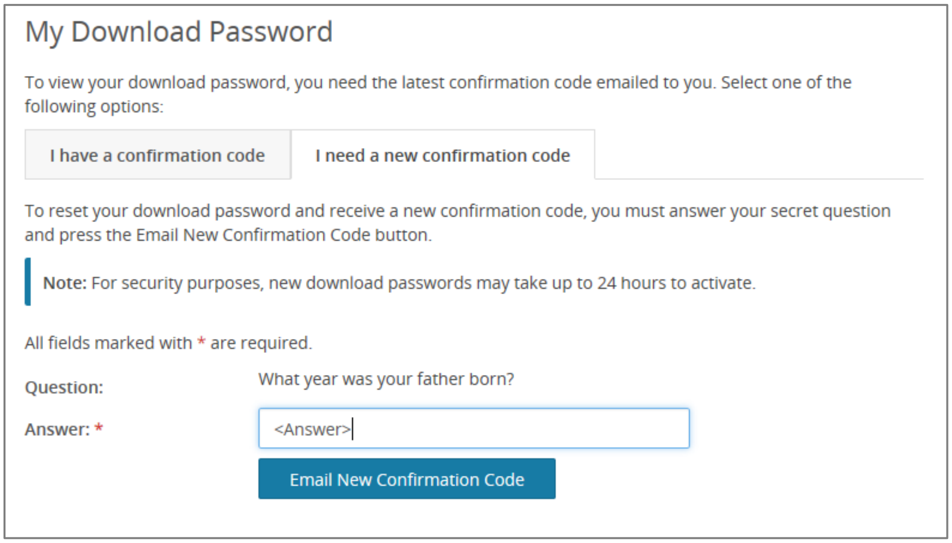
Figure 37~~45~~. My Download Password Page



2 Select the “I need a new confirmation code” tab.

The Confirmation Code tab loads.

Figure 38~~46~~. Example Confirmation Code Tab



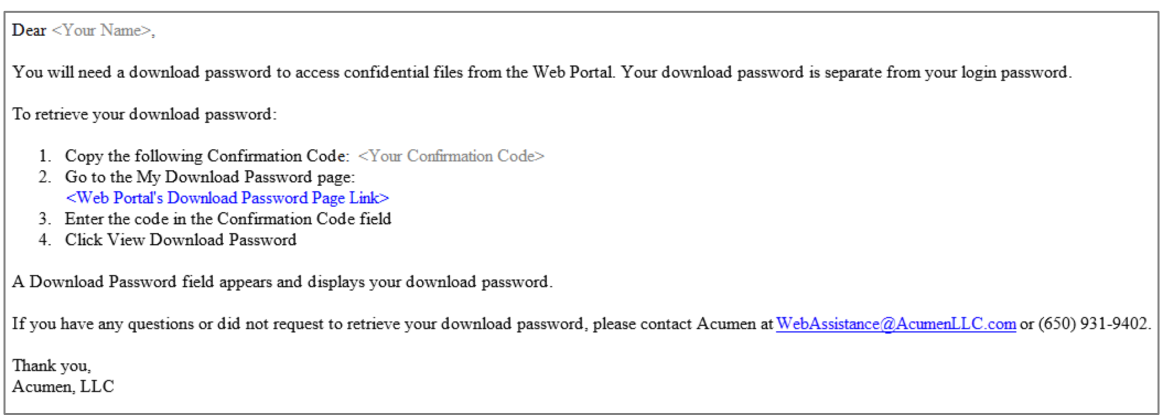
3 In the "Answer:" field, enter the answer to your security question.

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 39~~47~~. Example Confirmation Code Email



Dear <Your Name>,

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:

1. Copy the following Confirmation Code: <Your Confirmation Code>
2. Go to the My Download Password page:
   <Web Portal's Download Password Page Link>
3. Enter the code in the Confirmation Code field
4. Click View Download Password

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.

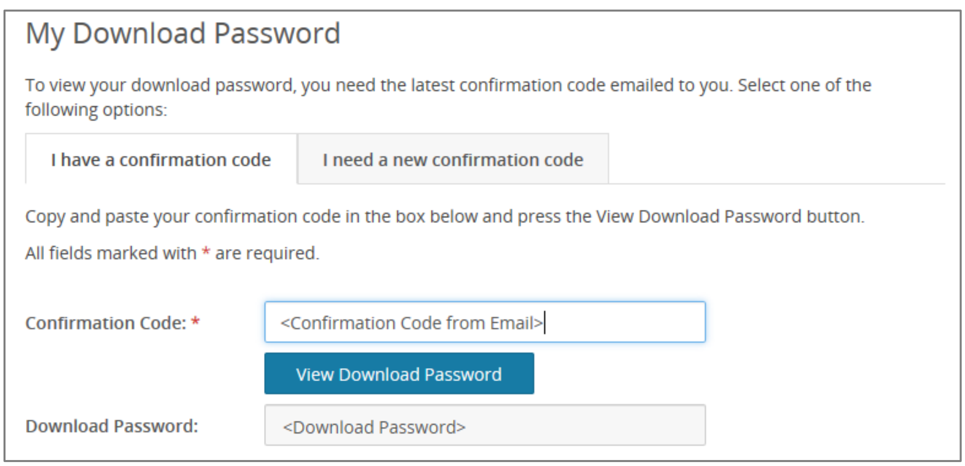
4 Ensure that the browser displaying the **My Download Password** page is active.

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 40~~48~~. Download Password View



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 password[9] 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.

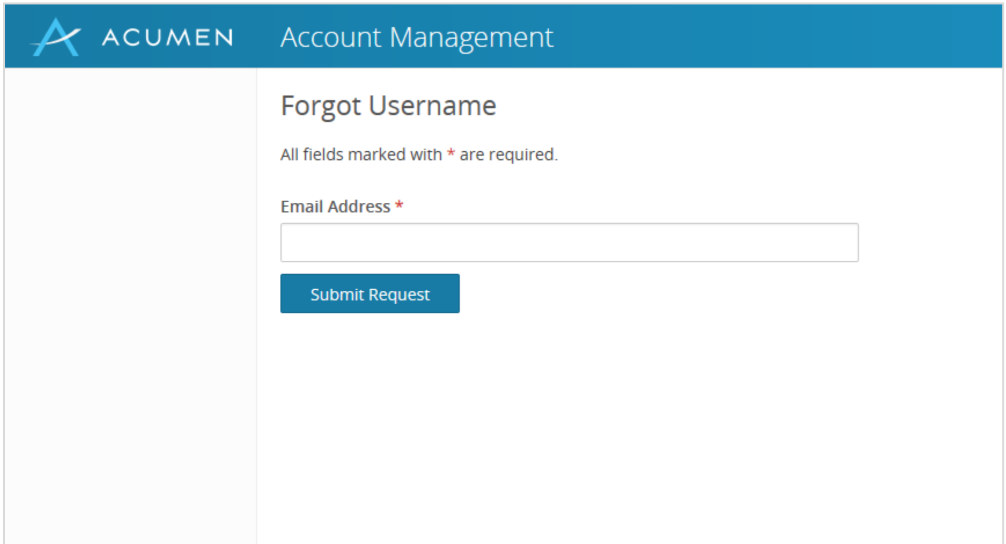
   The Terms and Conditions page loads (refer to Figure 5).
5. Read the Terms and Conditions, then click the **OK** button.

   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 41~~49~~. Forgot Username Page



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 agent[10].

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 (WebAssistance@AcumenLLC.com).

Figure 42~~50~~. Example Forgot Username Email

Dear <Name>,

Your username is: <Username>

If you have any questions or did not request to retrieve your username, please contact Acumen at Website_Support@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).

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:

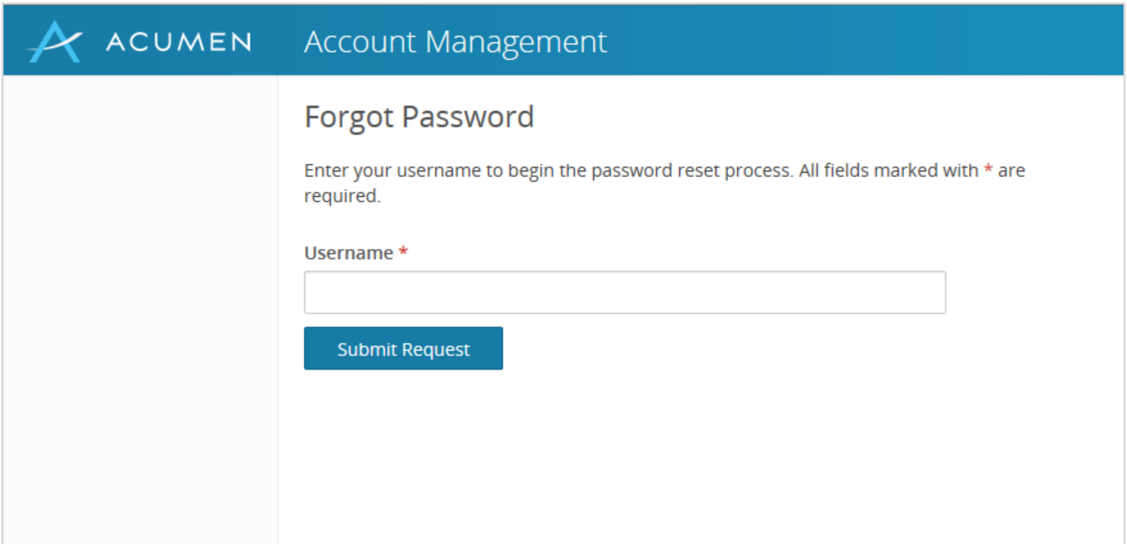
   https://PartD.ProgramInfo.US/PaymentSupport
3. Verify that the URL in the address field matches the URL specified in step 2.
4. After verifying the URL, press the **Enter** key on your keyboard.

   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 Password?**" link.

   The Forgot Password page loads.

Figure 43~~51~~. Forgot Password Page



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 44~~52~~. 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 Website_Support@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).

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

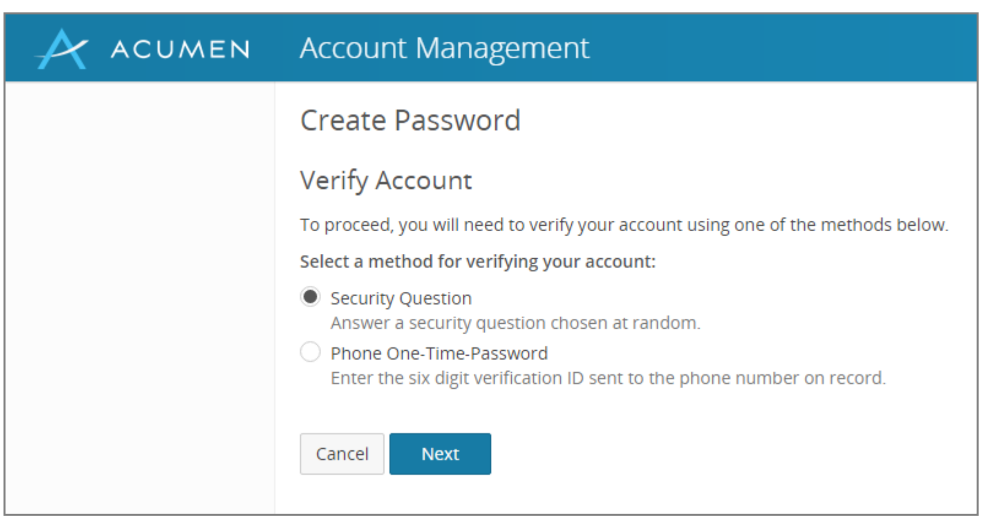
The Create Password page loads (refer to Figure 2).

11 In the “Username:” field, enter your username.

12 Click the **Next** button.

The Create Password – Verify Account page loads.

Figure 45~~53~~. Create Password – Verify Account Page



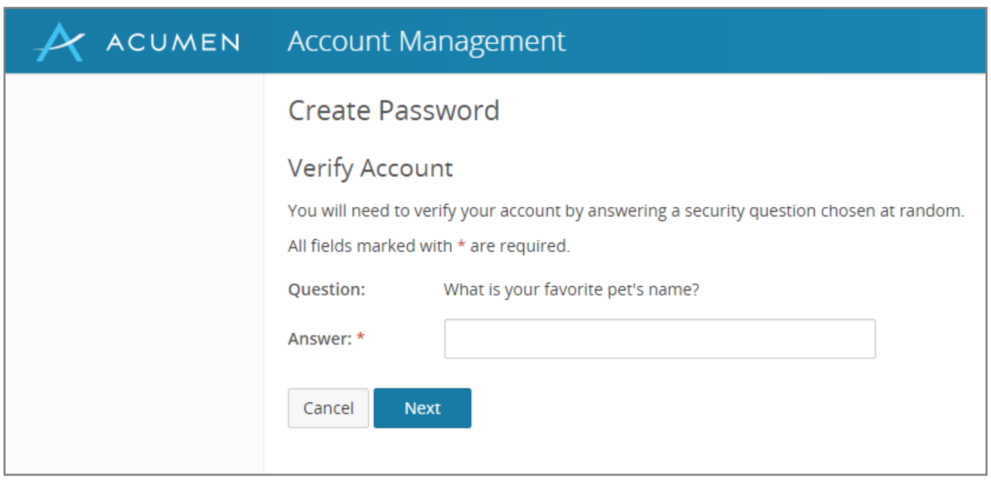
NOTE: You may choose one of two options for account verification: (1) answering a security question or (2) phone verification. These instructions will describe the process following option 1. For phone verification instructions, refer to [Section 2.5 Phone Number Verification].

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 46~~54~~. Create Password – Verify Account Page – Security Question



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 standard login process 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 headers[11] and page links, which Table 3 defines in alphabetical order.

Table 5. Link Headers & Page Links

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.

[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. Resubmit.	ZIP file cannot be opened. File(s) cannot be processed.

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.

Table 10. Summary of Topics: Search Tools

NAME	TYPE	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 *all* 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 *both* terms.**

NAME	TYPE	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.

Table 11. Ticket Tracking: Search Tools

NAME	TYPE	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 • Request Under Review
Ticket Number	Data-Entry Field	Enables you to enter all or part of a ticket number.

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 (WebAssistance@AcumenLLC.com).**
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 HIPAA Administrative Simplification: Regulation Text
14 Merriam-Webster entry for URL

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