

Abbreviated Users Guide

There are numerous possible variations for completing these forms. The validation provided is intended to ensure the most important questions are answered. To help ensure speedy completion of the enrollment process, please complete the entire form, answering all questions to the best of your ability. If you are using the electronic version of the forms to report a change of information, you will simply fill out the appropriate pages, print the pages completed, sign and submit.

Computer Requirements

To download and use the electronic forms, you must have a Windows 95 (or higher) operating system, access to the Internet, an Internet browser, and a printer.

Downloading Formatta Filler

The electronic versions of the CMS 855 forms require the Formatta Filler program to complete. Formatta Filler is a free software program. Follow the below directions to download and install Formatta Filler.

1. Click on the Formatta Filler link.
2. Select "Run this program from its current location" and click "OK."
3. Click "Yes" to install and run Formatta Filler Setup.
4. Read the licensing agreement and click "I Accept."
5. Click "Next."
6. Click "Finish."
7. Registration is not required. Close the registration form.

Formatta Filler has now been installed. Next, download the electronic version of the CMS 855 form you need.

Downloading CMS 855 Forms

1. Click on the link for the form you wish to complete.
2. Select "Run this program from its current location" and click "OK."
3. Click "Yes" to install and run the CMS 855 form.

4. Click "Next."
5. Click "Next" again.
6. Click "Finish" to exit the setup and launch the CMS 855 form.

Opening the CMS 855 Forms

The two easiest ways to open the forms are listed below.

1. If you have the CMS 855X shortcut icon on your desktop, double-click it to open the form.
2. If you do not have the CMS 855X shortcut icon on your desktop, click the "Start" button. Move your mouse to the "Programs" folder. A submenu will open. Move your mouse to the "CMS Forms" folder. Another submenu will open. This menu will contain the CMS 855 forms. Move your mouse over the form you wish to open and click. The form will open.

CMS Form Instructions

Each section and subsection includes the same set of instructions as the PDF and hard copy forms. The section and subsections are actually links and appear bold, blue and underlined. To open the instructions, simply click on the title of the particular section. This will launch your Internet browser and display the instructions for that specific section or subsection. If you have trouble returning to the CMS 855 form after opening the instructions, click on the 'x' in the upper right corner of your Internet browser. This will close the Internet browser and return you to the CMS form.

Navigating Within the Forms

To move from question to question, press the [tab] key to move the cursor to the next question. To move to the previous question, press and hold down the [shift] key while pressing the [tab] key to move up the page.

Like the [tab]/[shift-tab] keys, you can also use the [up] and [down] arrows on your keyboard to move the cursor to the next or previous questions. You can use the [left] and [right] arrow keys to scroll through the state names.

You can also use your mouse to move directly to whichever question you desire. The cursor will switch from an arrow to an I-bar when it is over a space that can be completed.

You can also use the 'Previous' and 'Next' buttons in the Formatta toolbar to navigate. Please note: the 'Previous' and 'Next' buttons will not activate the validation feature.

The 'Previous' button allows you to go to the previous page of the form. The 'Next' button allows you to go to the next page in the form.

You can also jump directly to a page that might be farther back or ahead. To do this, click on the small triangle on the right edge of the 'Previous' or 'Next' button and a pull-down menu appears, with a list of all previous or later pages. Select the page you wish to view.

Edit Check/Validation

As you begin completing the CMS form, you will notice an asterisk (*) located in certain sections of each page, and a gray button at the bottom of each page.

The gray buttons activate the edit check, or validation feature. When you click on the gray button at the bottom of the form, the edit check feature is initiated. It will check to see if you have completed the required information for that page. If not, you will get an error message. When you click 'ok,' you will either be taken to a highlighted asterisk, which indicates that information in that section needs to be completed, or you will be taken to the space (field) provided to answer that question.

You must complete the required information to proceed. Otherwise, you will continue to be prompted with the error message. This validation feature only works page-by-page. You cannot check the entire document at once.

(PLEASE NOTE: If you are reporting a change of information, the Edit Check/Validation feature does not apply because you do NOT have to complete the entire form-only your changes. Thus incomplete form fields while reporting a change are acceptable. Therefore, you should NOT use the

Validation buttons when completing the form. Instead, complete the appropriate sections and use the 'Previous' and 'Next' buttons to navigate. To print only the completed pages, press and hold the [CTRL] button while pressing [P]. Enter the page numbers you wish to print and click 'OK.')

The validation feature will **ONLY** work if you click the 'Validate and Continue' button. Using the edit checks will help ensure you do not forget to enter data into important fields on that page.

There are two gray buttons that activate the edit check feature: 'Validate and Continue' and 'Validate and Print'.

Validate and Continue

Complete each page to the best of your ability. When possible, please provide all requested information, and then click the 'Validate and Continue' button. This will perform edit checks for that page. If a required field on that page is not completed, the edit check feature will prompt you with a warning to complete that field.

Due to the myriad of individual circumstances for a party wishing to enroll in Medicare, the validation checks for only the bare minimum of information, or information that would be required by 100% of the applicants, 100% of the time.

Validate and Print

Like the 'Validate and Continue' button, when you click this button, you will be prompted to complete missing fields on that page before it will validate and print. When everything is entered and you click the 'Validate and Print' button, a print window will appear. The program will print out each page of the form. You can then sign the form, make a copy for your records, and mail in the original.

Saving the Form

When you are ready to save your work, there are several ways you can save the document.

Save

Selecting "Save" from the menu or toolbar will save the file.

Save as

If you select "Save as" from the menu you will see a prompt asking you to title the document, and to select a location to save the document. Enter the name of the file, choose the location, and click "Save". This will create an identical document with the same data in it, only with a different name.

If you have multiple instances of one form to complete, you can use "Save as" to create new forms for each applicant. If your form is blank to start with, follow the instructions in the previous paragraph to save as many versions as you need.

If your form has data on it, you can use the reset button to generate a clean copy. To do this, select "Save as" from the menu bar and create a new document as described above. In the new document, click the 'reset' button on the toolbar. All data will be erased. Click "Save".