

**Comprehensive User's Guide  
for the Electronic Versions  
of the CMS 855 Enrollment Forms**

***Software Specific Instructions***



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## Getting Started

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### ***About the electronic versions***

These electronic versions enable you to complete the CMS 855 enrollment forms using your computer and provide real-time edit checks, or validation. However, these forms still must be printed, signed and mailed in.

There are numerous variations possible for completing these forms. The validation provided is intended to ensure the major fields are completed. To help ensure speedy completion of the enrollment process, please complete the entire form, filling out all fields to the best of your ability.

Each of the electronic versions of the forms is laid out in the same format as the PDF and hard copy versions. The first few pages are general (federal) instructions and requirements for completing the forms.

The electronic versions include the same detailed instructions for completing each section as the paper and PDF versions. The instructions are provided through links that give section and subsection specific instructions.

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### ***Computer requirements***

To download and use the electronic versions, you must have the following minimum computer specifications:

- Windows 95 (or higher) operating system,
- Access to the Internet,
- An Internet browser, and
- A Printer

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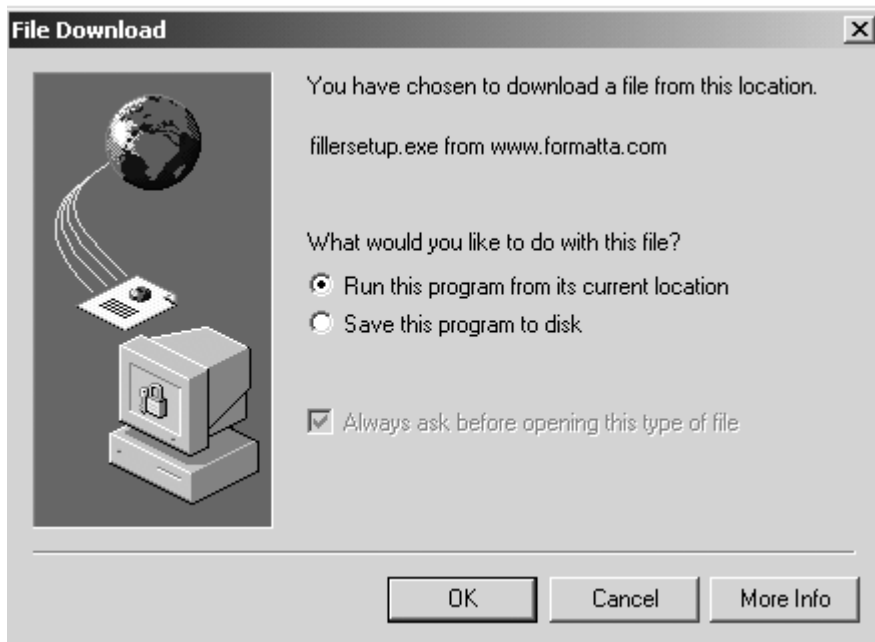
### ***Downloading and Installing Formatta Filler***

Before you can begin completing an electronic version of the CMS 855 forms, you must download and install the Formatta Filler program. Formatta Filler is a free software program and the download size is approximately 980K. Follow the instructions below to download and install Formatta Filler.

NOTE: For this guide, screen examples from Internet Explorer are used. Your screens may look slightly different.

## 1. GO TO THE CMS PROVIDER/SUPPLIER ENROLLMENT FORMS PAGE.

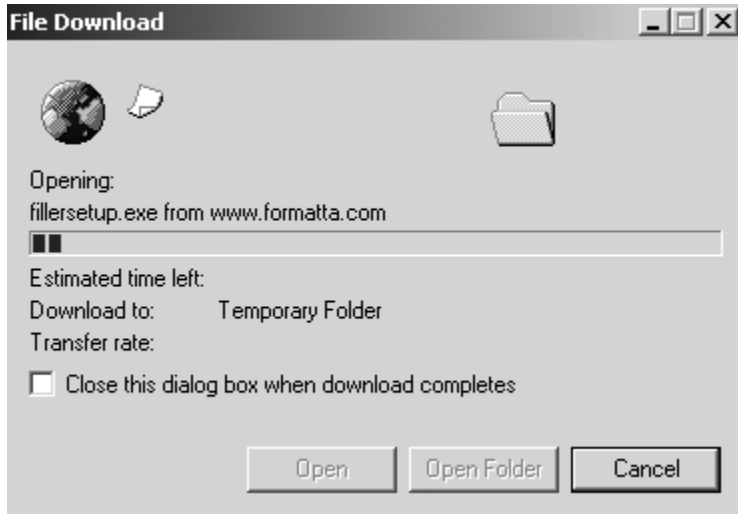
The link to download Formatta Filler is found on the CMS Provider Enrollment web site (<http://cms.hhs.gov/providers/enrollment>). In the Electronic Version Software section, click on the [Formatta Filler](#) link. This will begin the download and installation process. When you click on the link, the 'File Download' screen will appear.



**File Download**

## 2. SELECT "RUN THIS PROGRAM FROM ITS CURRENT LOCATION" AND CLICK "OK."

To run the Formatta Filler install program from its current location, the install program is first downloaded to a temporary folder on your computer. The below 'File Download' screen will appear to illustrate the download progress.

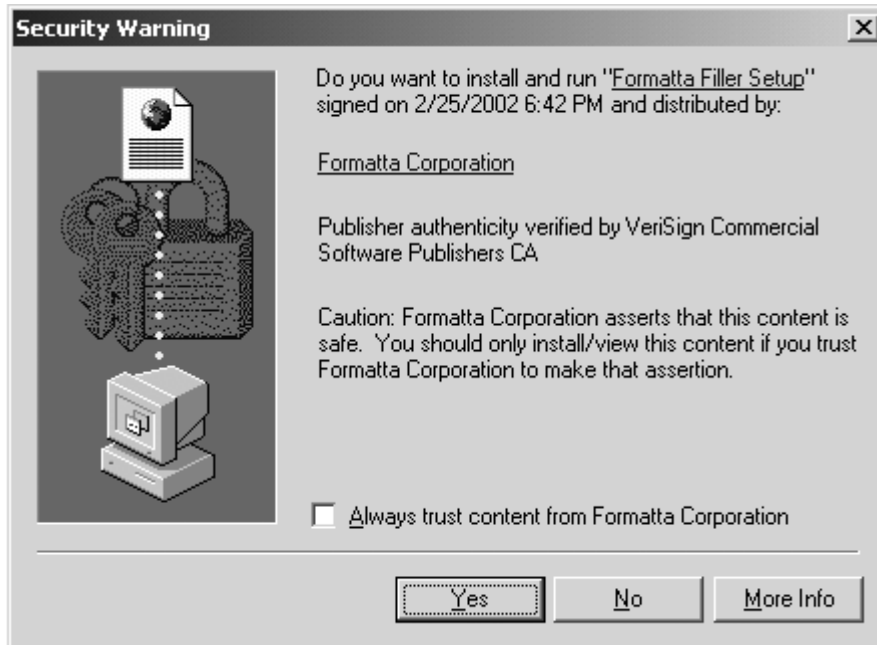


**File Download**

NOTE: When using Netscape, you will not see this screen. You will go directly to save the file. See the 'Save As' screen, page [18](#).

### 3. CLICK "YES" TO RUN "FORMATTA FILLER SETUP."

The 'Security Warning' screen will appear after the download has finished. Click "Yes" to run "Formatta Filler Setup."



#### Security Warning

As the installation program begins to run, you will see the 'Formatta Filler 6.0 Installation' window.



#### Formatta Filler 6.0 Installation

#### 4. READ THE LICENSE AGREEMENT AND CLICK "I ACCEPT."

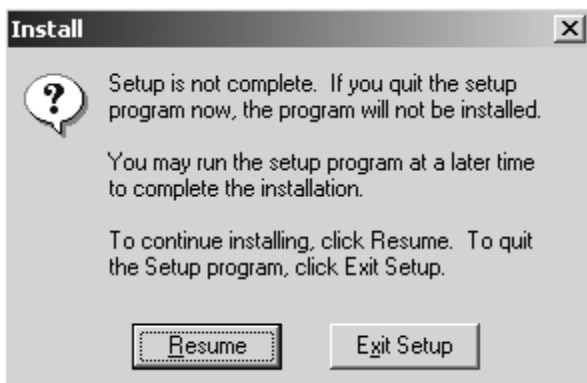
The licensing agreement will appear after the *'Formatta Filler 6.0 Installation'* window disappears.



#### License Agreement

Read the agreement. If you accept the agreement, click "I Accept."

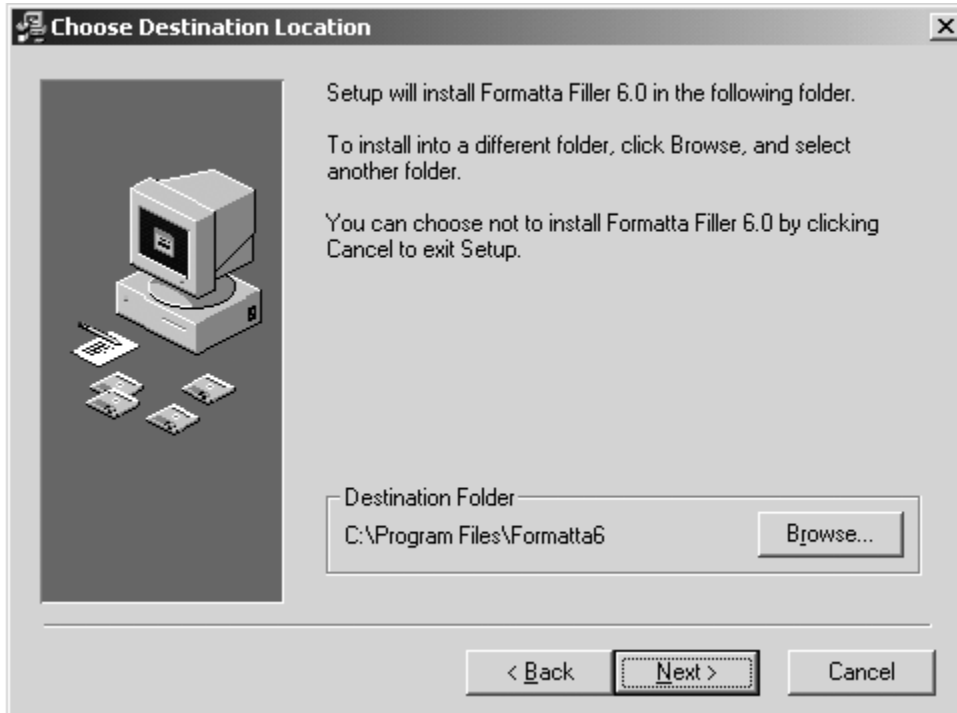
NOTE: If you do not accept the agreement, the *'Install'* window (below) will appear to notify you that Formatta Filler will not be installed. You will not be able to use the electronic versions of the CMS 855 forms unless you click the "Resume" button and then click the "I Accept" button.



#### Install

## 5. SELECT AND SAVE THE FILE TO A FOLDER.

Once you accept the license agreement, the next step is to choose where you want Formatta Filler installed on your computer. We recommend that you click the "Next" button to install Formatta Filler to the default location, C:\Program Files\Formatta6, without changing the destination location. The installation program will automatically create the destination folder. Once downloaded and installed, the folders containing the CMS 855 forms are always stored in the C:\Program Files\Formatta6\Forms folder.



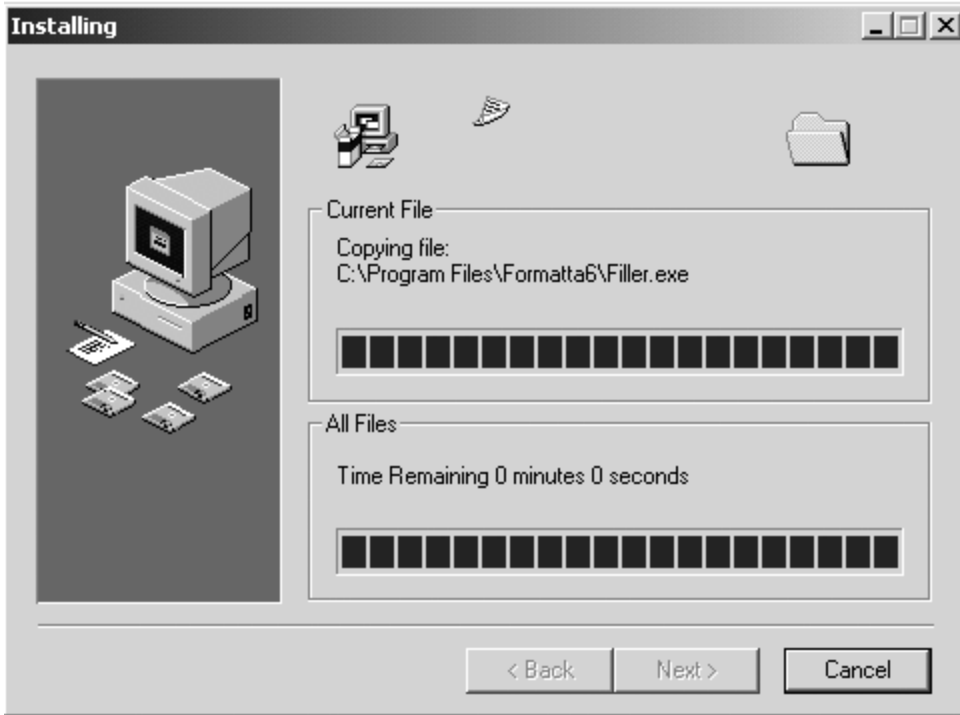
**Choose Destination Location**

If you want to change the default location from C:\Program Files\Formatta6, you will still be able to use electronic versions of the CMS 855 forms. However, it changes the default folder where Formatta looks for forms. Therefore, if you save to a different location, when you open Formatta Filler and try to open a form by clicking on the "open" button, you will not see the folders containing the CMS 855 forms. You will need to navigate to C:\Program Files\Formatta6\Forms\855X.



## 6. COMPLETE THE FORMATTA FILLER INSTALLATION.

After clicking "Next" on the 'Choose Destination Location' window, the 'Installing' window will appear to illustrate the installation progress.



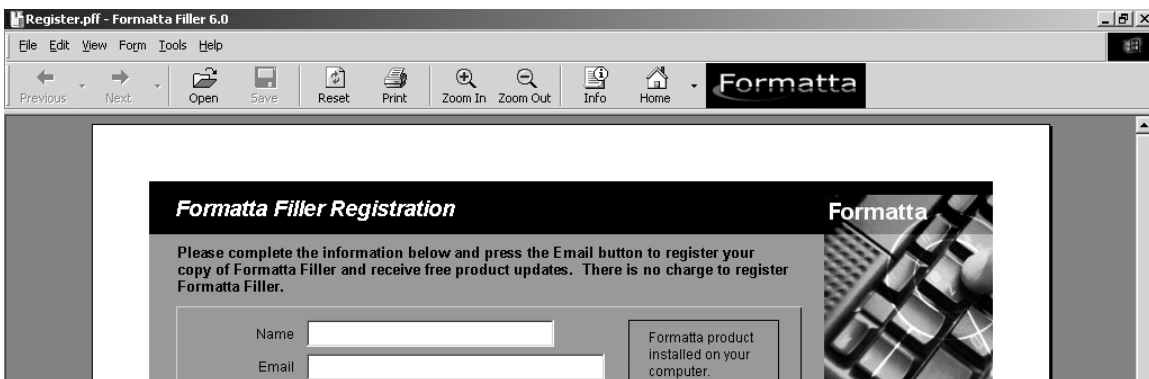
Installing

Once the installation is complete, the *'Installation Complete'* window will appear. To exit the installation, click the "Finish" button.



### Installation Complete

Formatta Filler is now installed on your computer. Formatta Filler opens the Formatta Filler Registration form, illustrated below.



### Formatta Filler Registration Form

You do not have to complete the registration form to use Formatta Filler. Close the registration form by clicking on the 'x' in the upper right corner of the screen.

Next, download an electronic version of the CMS 855 forms.

## ***Downloading and Installing a CMS 855 Form***

After installing Formatta Filler (see page [3](#)), to complete an electronic version of the CMS 855 forms, you must first download the specific form. To do this, begin by downloading the executable file from the CMS website to your computer.

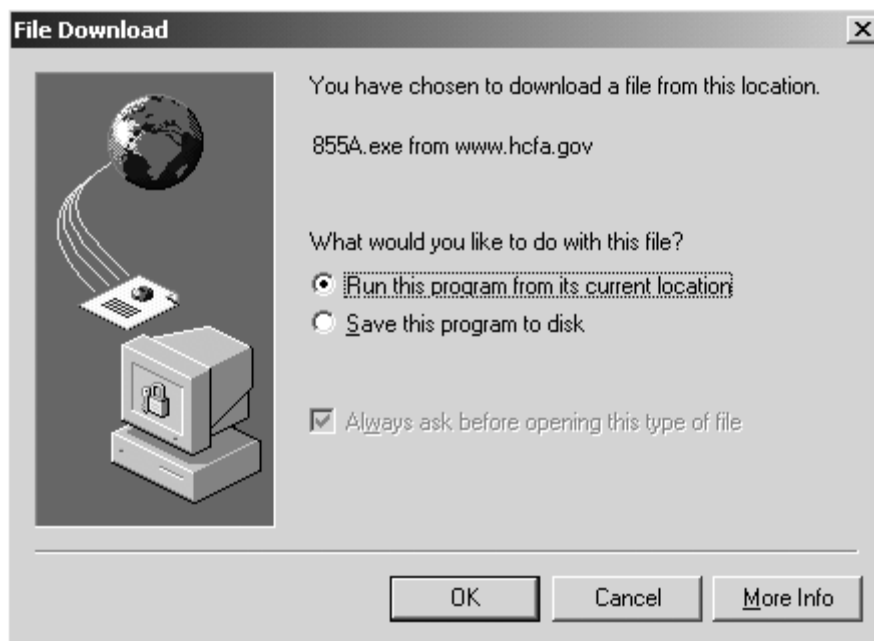
NOTE: Using a 56K modem, it should take you approximately 2 minutes to download each of the CMS forms.

### **1. SELECT THE FORM YOU WISH TO COMPLETE.**

Go to the CMS provider enrollment website (<http://cms.hhs.gov/providers/enrollment>) and click on the link for the form you wish to complete. Clicking a link to a specific form automatically triggers the downloading of the executable file to your computer. The executable file contains a program that installs the electronic version of the selected CMS 855 form on your computer. Once the executable file is on your computer, you double-click on the executable file icon and the file automatically installs the electronic version of the CMS form.

NOTE: For this guide, screen examples from Internet Explorer are used. Your screens may look slightly different.

When you select a form, you will see the 'File Download' screen:

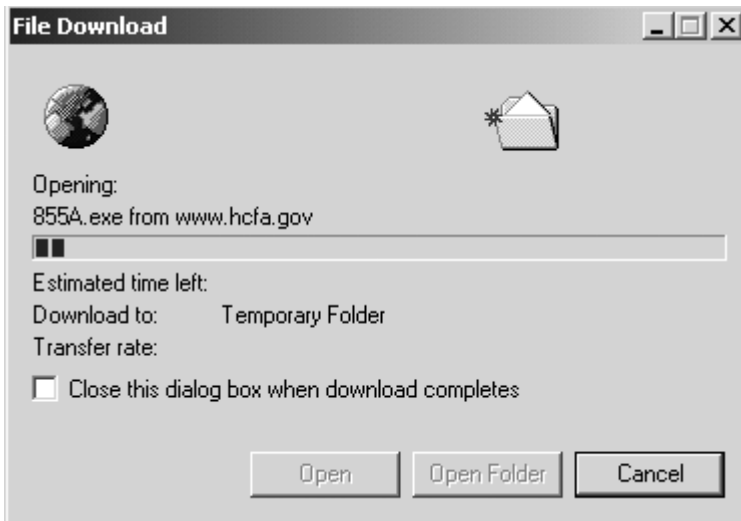


**File Download**

(NOTE: When using Netscape, you will not see this screen. You will go directly to save the file. See the 'Save As' screen, page [20](#).)

## 2. SELECT “RUN THIS PROGRAM FROM ITS CURRENT LOCATION” AND CLICK “OK.”

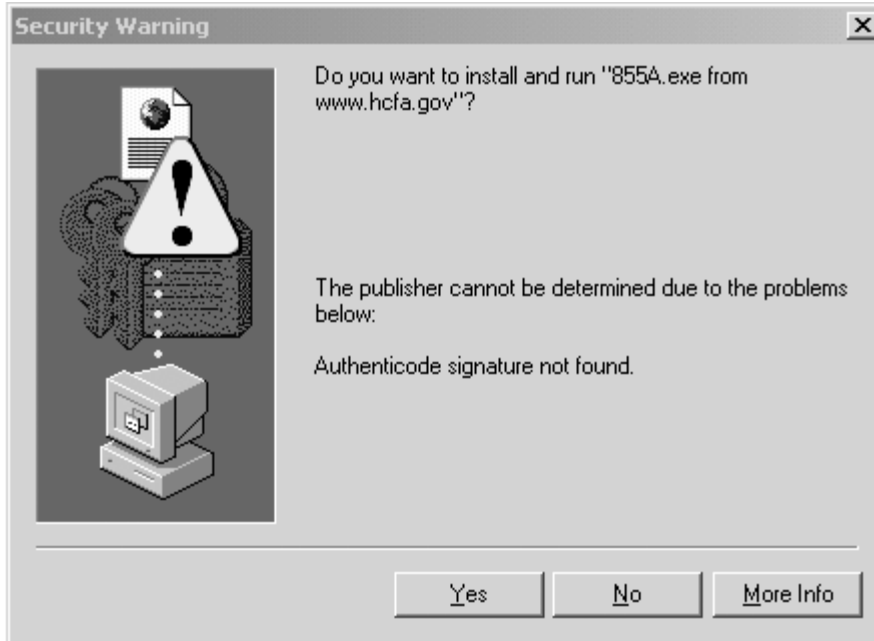
To run the install program for an electronic version of a CMS 855 form from its current location, the install program is first downloaded to a temporary folder on your computer. The below *'File Download'* screen will appear to illustrate the download progress.



**File Download**

### 3. CLICK “YES” TO RUN “855X.EXE.”

The ‘*Security Warning*’ screen will appear after the download has finished. Click “Yes” to run “855X.exe.”

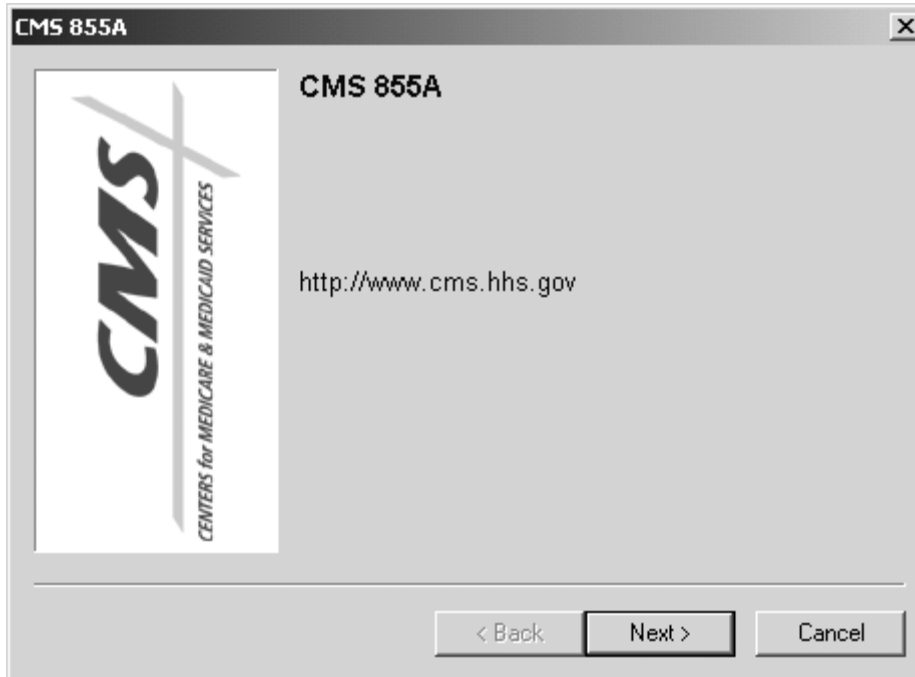


#### **Security Warning**

Internet Explorer browsers use “authenticode verification” to confirm whether a file you’re running has a valid authentication certificate. This is an Internet Explorer issue and will not affect your ability to use the CMS 855 forms. Please click “Yes” to run the 855X.exe file and install the electronic version of the CMS 855 form.

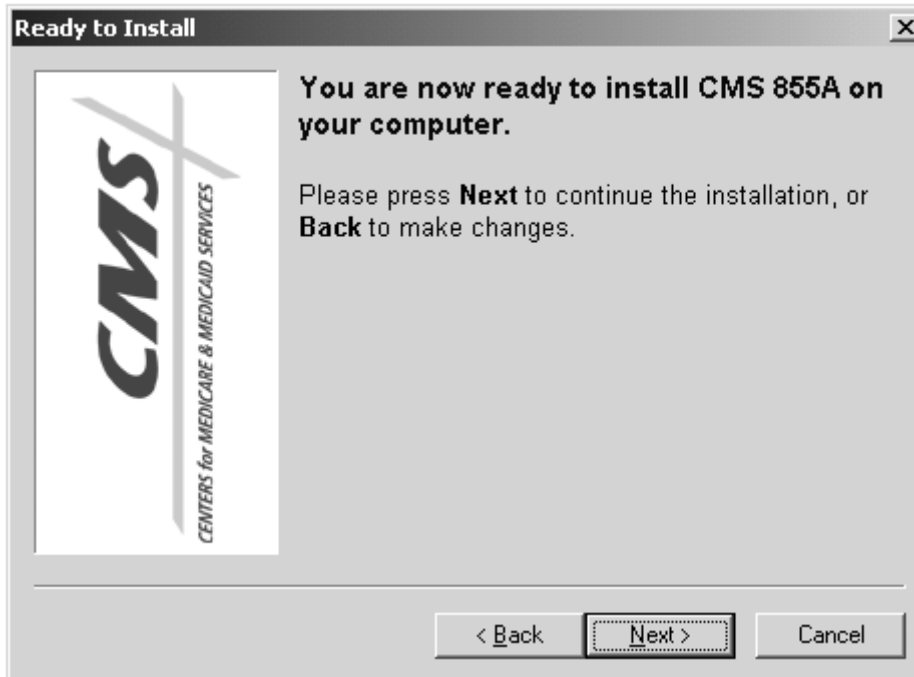
**4. CLICK “NEXT” TO BEGIN INSTALLING THE ELECTRONIC VERSION OF THE SELECTED CMS 855 FORM.**

When the ‘*CMS Form Install*’ screen appears, click “Next” to begin the installation.



**CMS Form Install**

Click "Next" again when the 'Ready to Install' screen appears.



#### Ready to Install

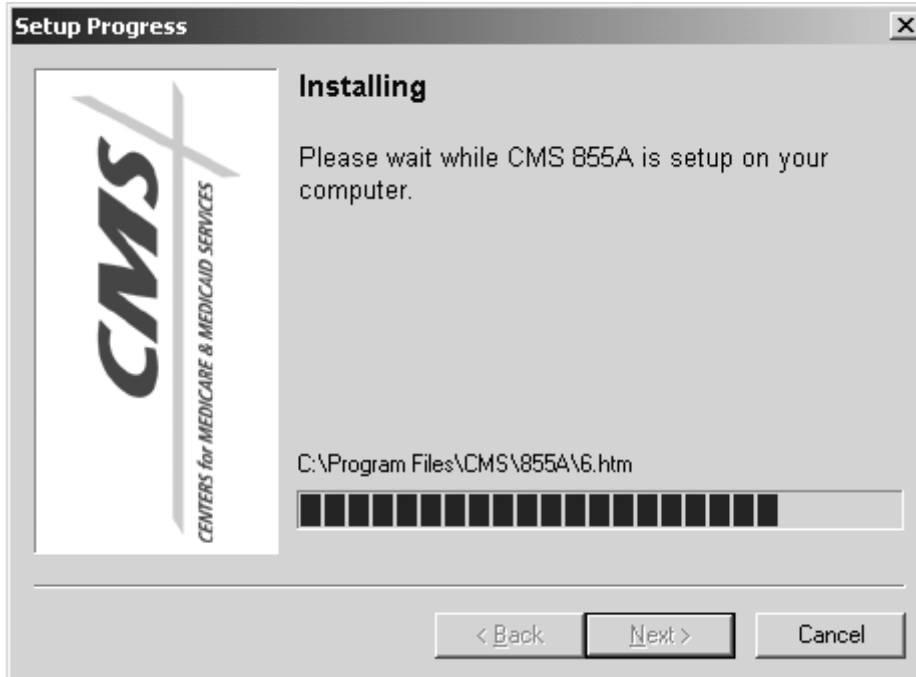
The install program automatically adds a shortcut to the electronic version of the selected CMS 855 form on your desktop. The shortcut is illustrated below.



CMS 855A

If you prefer to delete the shortcut (or delete it accidentally), there are ways to access the electronic versions without it. See the Opening the Form section on page [21](#) for more information.

During the install process the 'Setup Progress' screen will display the progress.



Setup Progress

## 5. CLICK "FINISH" TO COMPLETE THE INSTALLATION

On the 'Setup Complete' screen, select "Finish" to complete installation of the specific CMS form to your computer.



Setup Complete



### ***Alternate Formatta Filler download instructions***

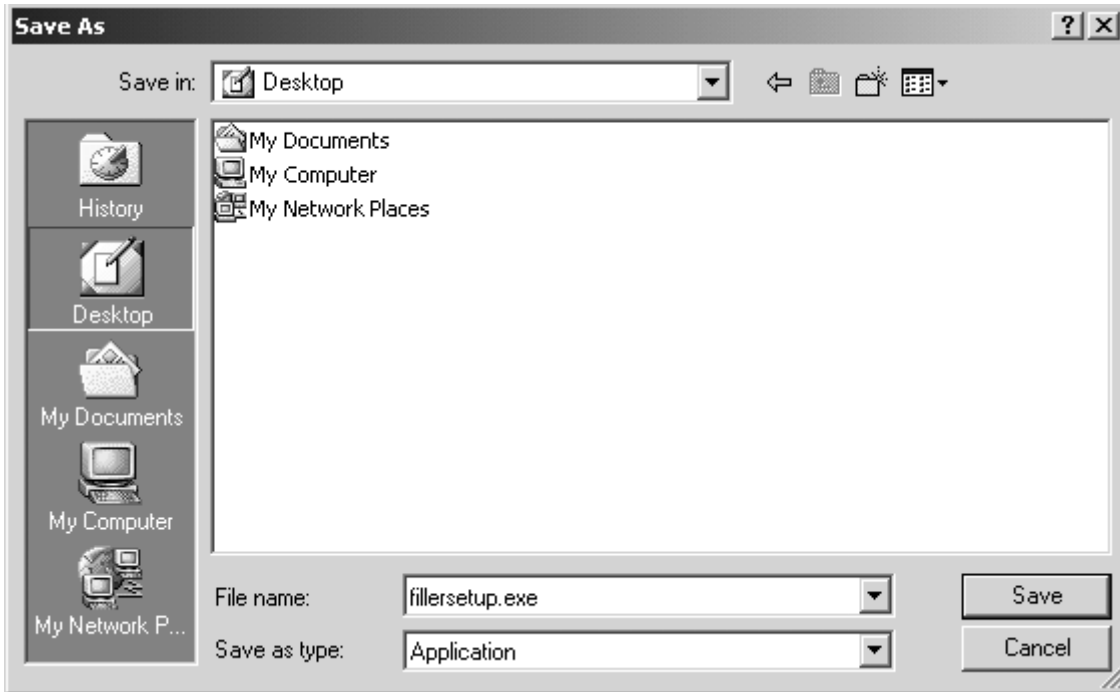
If you have a slow Internet connection, you may want to select “Save this program to disk.” These instructions begin after step #2 of the Downloading and installing Formatta Filler (page 3). After completing these steps, refer to step #3 on page 6. The instructions below will guide you through saving the file to disk.

In the ‘File Download’ window, choose “Save this program to disk” and click the “OK” button.



**File Download**

After clicking the “OK” button, the ‘Save As’ window will appear. Choose the location on your computer where you want to save the fillersetup.exe file. The fillersetup.exe file is the file that will install Formatta Filler. For ease of location, we recommend that you save the file to your desktop, as illustrated below.



**Save As**

**NOTE: After installing Formatta Filler, it is important to delete the fillersetup.exe file. This will help to avoid confusion.**

Next, find the fillersetup.exe file that you downloaded. If you saved the file to your desktop, the icon representing the file is illustrated below. Double-click on the icon to begin the Formatta Filler installation.



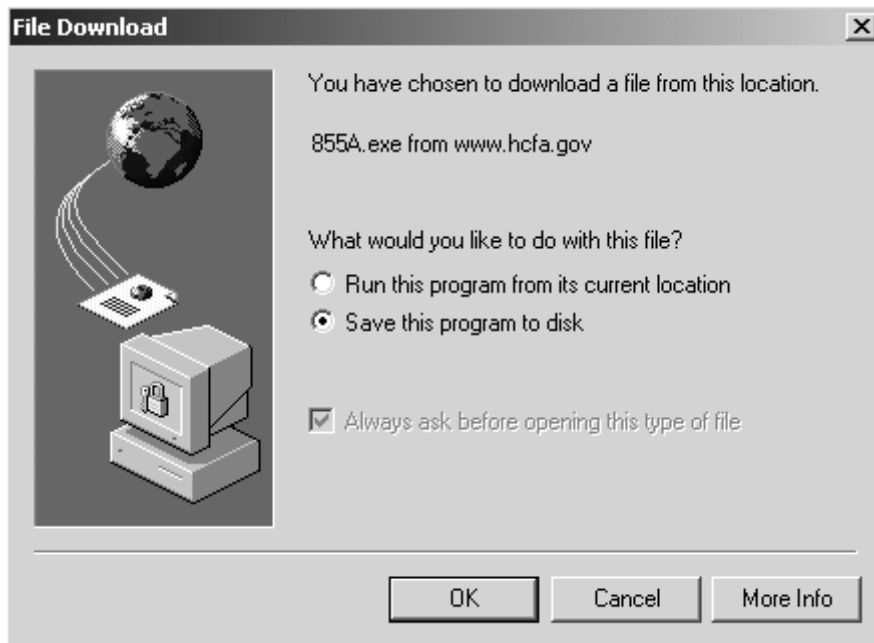
fillersetup.exe

To continue downloading and installing Formatta Filler, please see page [6](#).

### ***Alternate electronic version download instructions***

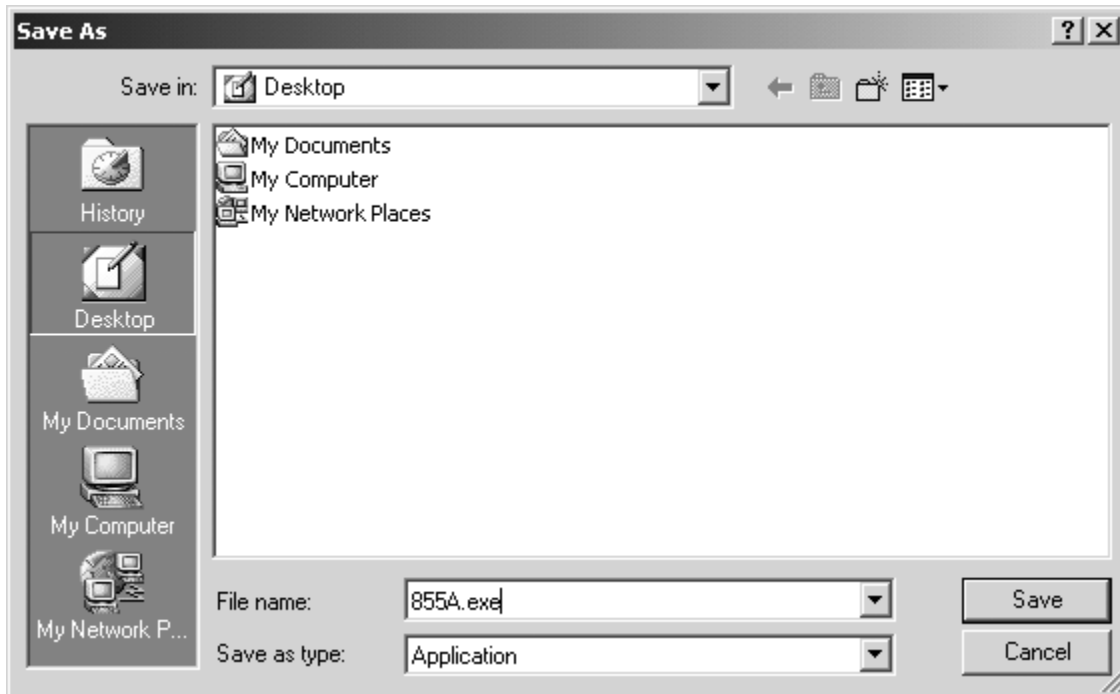
If you have a slow Internet connection, you may want to select “Save this program to disk.” These instructions begin after step #2 of the Downloading and Installing a CMS 855 Form section (page [11](#)). After completing these steps, refer to step #3 on page [13](#). The instructions below will guide you through saving the file to disk.

In the ‘File Download’ window, choose “Save this program to disk” and click the “OK” button.



**File Download**

After clicking the “OK” button, the ‘Save As’ window will appear. Choose the location on your computer where you want to save the 855X.exe file. The 855X.exe file is the file that will install the electronic version of the selected CMS 855 form. For ease of location, we recommend that you save the file to your desktop, as illustrated below.



**Save As**

**NOTE: After installing the electronic version of the selected CMS 855 form, it is important to delete the 855X.exe file. This will help to avoid confusion.**

Next, find the 855X.exe file that you downloaded. If you saved the file to your desktop, the icon representing the file is illustrated below. Double-click on the icon to begin the installation of the electronic version of the selected CMS 855 form.



855A.exe

To continue downloading and installing Formatta Filler, please see page [13](#).

## Completing the Electronic Forms

This guide assumes you are completing the enrollment form for the first time, in its entirety. If you are using the electronic version of the forms to make a change, see the “Reporting a Change of Information” section, page [36](#) for details.

To enter data, you will use your keyboard and a combination of the tab button, arrow keys and your mouse.

### *Opening the form*

To begin, open the CMS form you wish to complete. There are several ways to open the forms. The two easiest 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.

If the form you wish to open is currently open, you will receive an error message. This prevents the loss of information. Please use the form that is already open.

**IMPORTANT NOTE: To avoid losing information entered into an electronic version of a CMS 855 form, please read this if you selected to “Save this file to disk” (see page [Error! Bookmark not defined.](#)) during the download and installation of the form. After installing the electronic version of the CMS 855 form, DO NOT double-click on the 855X.exe file. This will not open the electronic version of the CMS 855 form, but will reinstall it. The reinstallation will erase any information previously entered in the form. To avoid losing information, please delete the 855X.exe file after installation.**

### *Entering information*

#### **TAB, SHIFT-TAB**


When you first arrive at a page on which you can enter information, the cursor will be located in the blank provided for the first question of the page.

To move from question to question, press the [tab] key to move the cursor to the next question. This will take you through all questions, in order, from top to

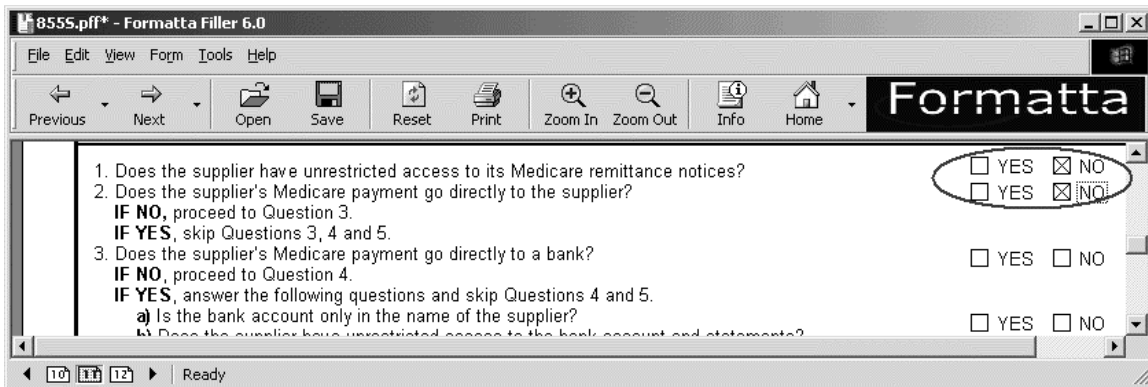
bottom. To move to the previous question, press and hold down the [shift] key while pressing the [tab] key to move up the page.

## COMPUTER MOUSE

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 the blank provided for a question.

The cursor will look like this: 

In the sections with check boxes, you can move to the appropriate box with the [tab] key. When you wish to select a particular answer, you can press the [enter] key, hit the spacebar, or click the mouse. That check box will be selected and marked with an 'x' as shown in the 'Check Boxes' screen.



### Check Boxes

To enter text, move the cursor to the specific question and type the answers in the spaces provided.

## ARROW KEYS

Like the [tab]/[shift-tab] keys, you can also use the up [ $\uparrow$ ] and down [ $\downarrow$ ] arrows on your keyboard to move the cursor to the next or previous questions.

You can use the left [ $\leftarrow$ ] and right [ $\rightarrow$ ] arrow keys to scroll through the state names. For example, if you tab into the State selection box, use the left and right arrows to scroll through the alphabetical list until you find your selection. Press the [enter] key to select that State and move to the next question.

If using your mouse, you can simply click on the arrow and scroll down to select your particular state (see 'State Selection' screen).

The screenshot shows the Formatta Filler 6.0 application window. The menu bar includes File, Edit, View, Form, Tools, and Help. The toolbar contains buttons for Previous, Next, Open, Save, Reset, Print, Zoom In, Zoom Out, Info, and Home. The main form area is titled '8555.ppf\* - Formatta Filler 6.0'. It contains several input fields: 'Business Street Address Line 1', 'Business Street Address Line 2', 'City', 'State' (with a dropdown menu open showing AK, AL, AR, AS, AZ), 'ZIP Code + 4', 'Telephone Number (Ext.)', 'Fax Number (if applicable)', 'E-mail Address (if applicable)', and 'Effective Date: / /'. Below these is a section titled 'C. Billing Agreement/Contract Information' with the instruction 'Answer the following questions about the supplier's agreement with your billing agency.' Two questions are listed: '1. Does the supplier have unrestricted access to its Medicare remittance notices?' and '2. Does the supplier's Medicare payment go directly to the supplier?'. Each question has checkboxes for YES and NO. The status bar at the bottom shows 'Ready'.

### State Selection

## ***Deleting information***

To delete information you have entered in an electronic version, you can use the "Delete" button or the "Backspace" button. Information can only be deleted one field at a time. You cannot highlight several fields at once and delete the information contained in each field. This is a limitation of the Formatta Filler software.

If you want to delete all information entered in a form, follow the instructions provided in the "Need a Clean Copy?" section on page [28](#).

## ***Accessing CMS 855 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. (You do not need to be on-line to access these instructions.) When opened, the instructions can be printed. To close the instructions, click on the 'x' in the upper right hand corner of the window.

The circled sections in the *'Instructions'* screen below show examples of where you will find a link for the instructions in the electronic version of the forms.

8555.pff\* - Formatta Filler 6.0

File Edit View Form Tools Help

Previous Next Open Save Reset Print Zoom In Zoom Out Info Home **Formatta**

OMB Approval No. 0938-0685

**2. Supplier Identification**

This section is to be completed with information specifically related to the business location of the supplier submitting this application. Furnish the following information: the supplier's legal business name and address as reported to the IRS for issuance of IRS Form 1099, the type of business this supplier operates as, the type(s) of products and services this supplier will furnish, and information about the supplier's liability insurance.

**A. Supplier IRS Identification Information**  Change Effective Date: / /

Furnish the supplier's legal business name (as reported to the IRS). A copy of the IRS CP-575 or other correspondence issued by the IRS showing the TIN for this business **MUST** be submitted.

1. Legal Business Name as Reported to the IRS	Tax ID Number
1099 Mailing Address Line 1	Former Tax ID Number (if changed)

Ready

### Instructions

Clicking on the main header will give you the instructions for the entire section, including subsections. Clicking on the sub-headers will give you instructions for just that sub-heading.

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.

For example, if you click on "A. Supplier IRS Identification Information" in the *'Instructions'* screen (see previous image), you will see a screen with those instructions (see image below).

Section 2A - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Google

Address C:\Program%20Files\CMS\855S\2A.htm Go

**A. Supplier IRS Identification Information** - This section is to be completed with information specifically related to the business location of the DMEPOS supplier submitting this application.

If reporting a change to existing information, check "Change," provide the effective date of the change, complete the appropriate fields in this section, and sign and date the certification statement. Otherwise:

1. Provide the legal business name as reported to the Internal Revenue Service (IRS), and the tax identification number (TIN) issued by the IRS to this supplier business location or the TIN used by this business location for tax reporting purposes.

Attach documentation (e.g., a copy of the IRS CP-575) from the IRS showing that the name matches that reported in this application. If the supplier does not have an IRS CP-575, any official correspondence from the IRS that shows the supplier's name and TIN will be acceptable proof.

If the supplier cannot obtain the required IRS document, explain why in a separate attachment and provide evidence that links its legal business name with the reported TIN. If the name and TIN do not match on the

### Instructions, detail



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## ***Using the edit check/validation features***

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Due to the myriad of individual circumstances for a party wishing to enroll in Medicare, the validation feature checks for only the bare minimum of information, or information that would be required by 100% of the applicants, 100% of the time. This validation feature only works page-by-page. You cannot check the entire document at once.

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 validation feature is initiated. It will check to see if you have provided the required information for that page. If not, you will receive an error message (see image below). 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.



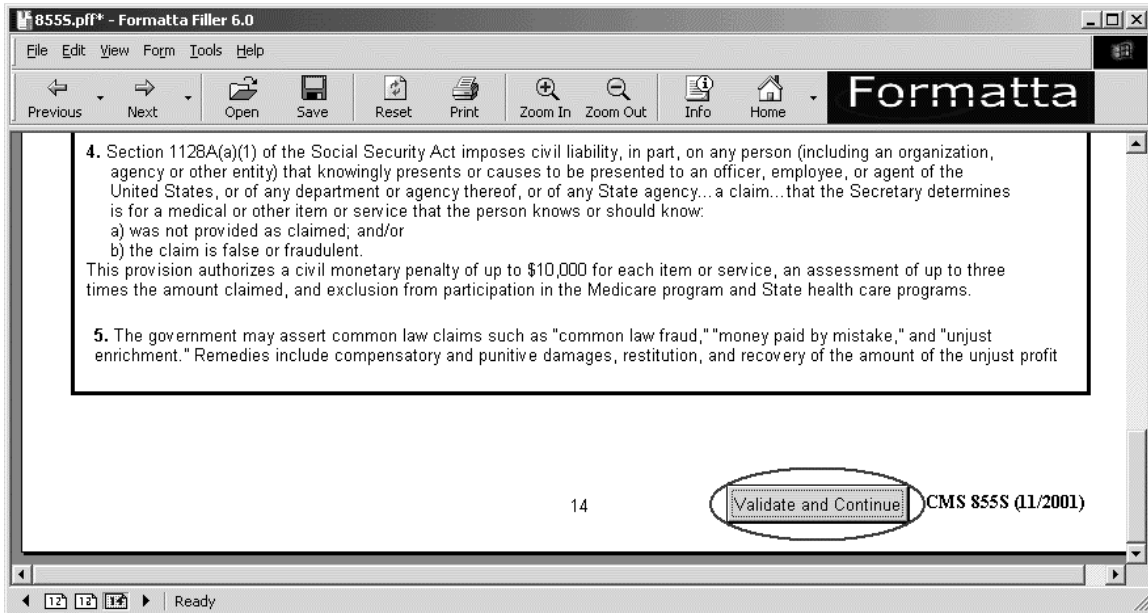
While you can enter data and then click the 'Previous' and 'Next' buttons on the Formatta Filler toolbar to move from page to page, **the edit check feature will ONLY work if you click the 'Validate and Continue' or 'Validate and Print' buttons.** Using the validation checks will help ensure you do not forget to answer important questions on that page.

If you are using the electronic version of the forms to make a change of information, **do not** use the validation buttons. (See "Reporting a Change of Information," page [36](#) for more details.)

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

## Validate and Continue Button

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 the validation checks on that page.



### Validate and Continue

If a required question (field) on that page is not completed, the validation feature will prompt you with an error message to answer that question.



### Error Message

In general, the error message defines the field that needs to be completed. Using the above error message as a guide, it is generally broken down as follows:

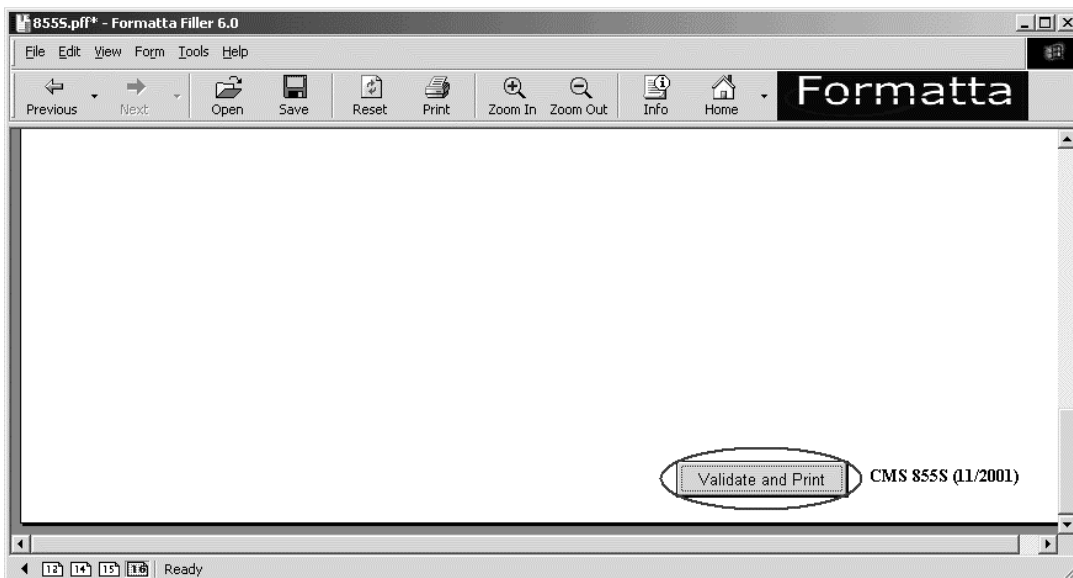
- "Six" = The error or omitted information is in the 6<sup>th</sup> section of the form
- "A" = The error or omitted information is in sub-section A of the 6<sup>th</sup> section
- "1" = The validation that found the error or omitted information is the first validation check for subsection A of section 6. *This number does not correspond to the question number.*

- “FirstName” = Abbreviated name for the question with the error or omission.

As described above, the text in the prompt will indicate which question is incomplete. In addition, when you select ‘OK’ the program will take you to an asterisk next to the section or to the space provided for a question’s answer. You must complete the required information to proceed. Otherwise, you will continue to be prompted with the error message.

### Validate and Print Button

On the last page of each form, you will see a button that reads ‘Validate and Print’ (see image below).



### Validate and Print

Like the ‘Validate and Continue’ button, when you click this button, you will be prompted to complete omitted questions on that page before it will validate and print. After completing the last page of the application, click the ‘Validate and Print’ button, and, after the page has been validated, a print window will appear. After printing, you can then sign the form, make a copy for your records, and mail in the original.

If you wish to validate the last page, but not print the form, simply select ‘cancel’ on the print window when it appears. You can return at a later time to print the document.

## ***Printing the form***

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When you are on the last page of the electronic version of any CMS 855 form, you can click on the 'Validate and Print' button to launch the print screen and print out the form. The print screen will give you the option to print the entire form or specific pages of the form.

You can also use the 'Print' button on the Formatta Filler toolbar, or the 'Print' option from the Formatta Filler menu bar to print the form or instructions. (See pages [31](#) or [34](#) for more details)

**NOTE:** At any time, to print out a single page or a range of pages, you can use your keyboard. To do this, press and hold the [CTRL] button while pressing [P].

## ***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. This means every time you open the form and save it using the toolbar, you will always maintain one version of the document (overwriting the previous versions).

### **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.

### **Need Multiple Copies?**

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.

### **Need a Clean Copy?**

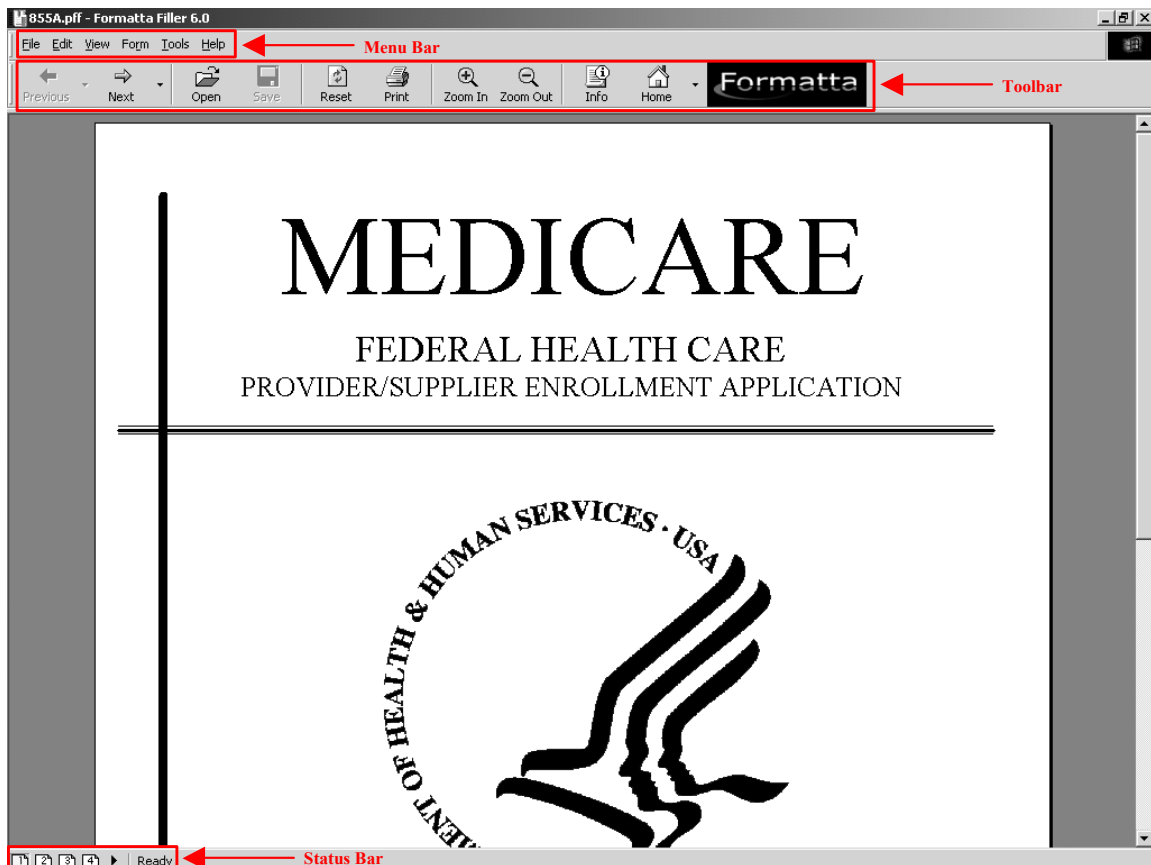
If your form has data on it, you can use the reset button to generate a clean copy. To do this, select "Save as" from the menu bar and create a new document as described above. In the new document, click the 'reset' button on the toolbar. All data will be erased. Click "Save" to save the blank copy.

## Using Formatta Filler

This section contains information on viewing the forms, the menu bar, the toolbar, status bar and navigation options available within the electronic versions of the CMS 855 form(s). We will define and review the different features available. If you are familiar with how a web browser works, you will be very familiar with how this program works. There are some nuances that we will discuss, in terms of which menu or toolbar item will be most helpful for you to use, depending on which action you require.

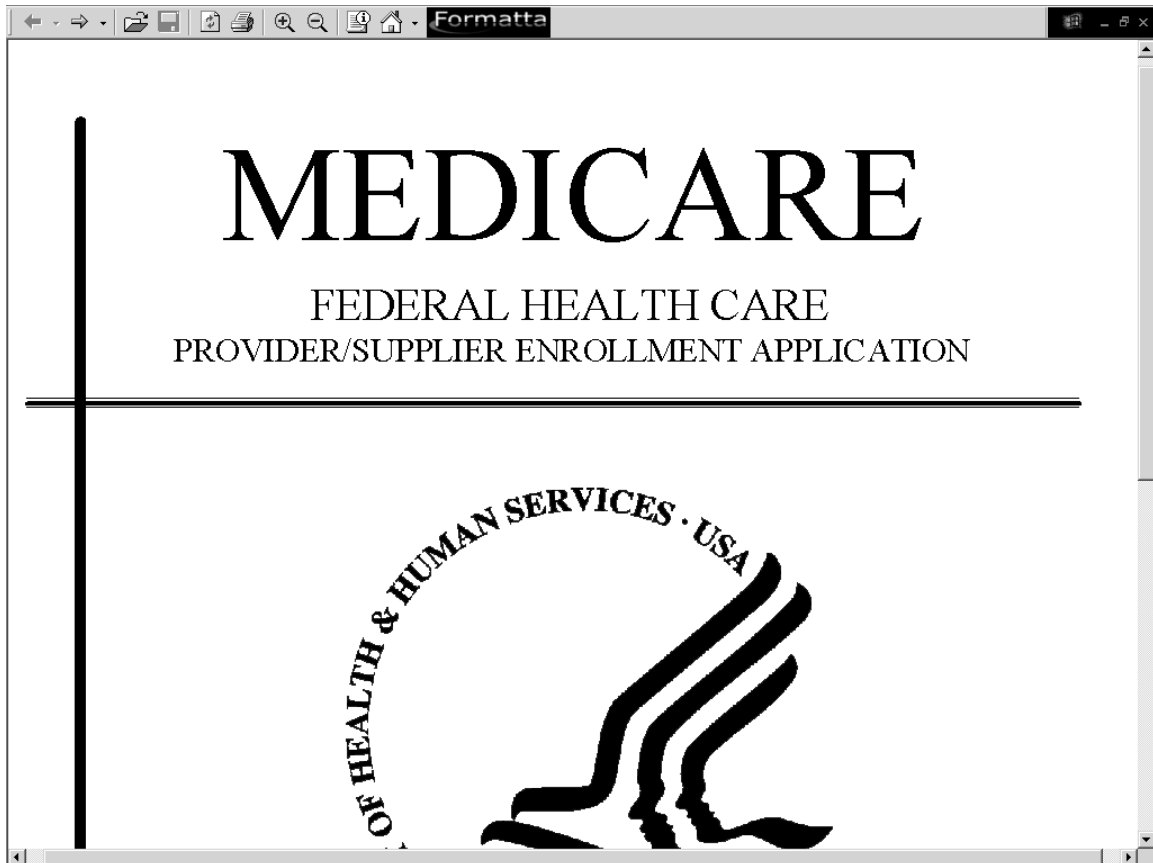
### *Viewing the forms*

The following diagram shows the form in *Normal Mode*. In the following sections, we will review each of the areas highlighted in red.



**Normal Mode**

The form can also be viewed in *Full-Screen Mode*. To change to *Full-Screen Mode*, press F11 on your keyboard. Press F11 again to switch back to *Normal Mode*.



Full-screen mode

In the *Full-Screen Mode*, the icons in the upper left toolbar appear without the text of their names. However, their functionality is exactly the same as when in normal mode.

In the upper right toolbar, these symbols also represent additional commands:



Clicking the double page icon returns the view to normal mode. Clicking the X closes the form completely. You will be prompted with a 'save' command if you have made changes.

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## **Menu bar**

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The menu bar provides a set of options with pull-down menus that, when selected, provide commands for operating the Formatta Filler program. You will only use a few of the pull-down items when completing the electronic version of the forms.

### **File**

This option allows you to perform many of the tasks that are also available via the toolbar. This includes opening, closing, saving and printing files. To print out your entire form, select 'Print' from this option. NOTE: At any time, to print out a single page or a range of pages, you can use your keyboard. To do this, press and hold the [CTRL] button while pressing [P]. This is the best way to print a select page or range of pages.

### **Edit**

The only item active in this menu is 'reset all.' It works exactly as the 'reset' button on the toolbar. The reset button will erase ALL data you have entered into the entire form, not just from the current page. Select this only if you want to create a clean form.

If you accidentally hit this button, you can recover from it. To do this, immediately close the window (by selecting the 'x' in the upper right hand corner of the form). You will be asked if you want to save changes to the form. Select "no." You will lose all information entered since the last time you saved, but you will not lose all of the information that has been entered.

### **View**

The view menu enables you to select which features are displayed. The features include the status bar, toolbar, bubble tips, and calendar. For example, if you do not wish to have the calendar appear when entering a date field, deselect the calendar feature from the pull-down menu. A check mark will appear next to the features that are currently active. Inactive features will have no check mark.

In this menu, you can also choose to view the form in *Full Screen Mode*. To return to *Normal View Mode*, click the double-page icon in the upper right of the screen.

You can also go to this menu to select zoom in or zoom out.

### **Form**

The only option available under this menu item is "summary info." This allows you to display information about the form, such as point-of-contact data, version, description, title and other information.

## Tools

Though they are all enabled, you will not need to use any of the features under this menu.

## Help

The help section applies specifically to the Formatta Filler program and not to the CMS forms. If you select the Formatta help feature, it will take you to the help pages on the Formatta web site. While you can use this feature if you wish, the help that is available in this guide, and via the electronic form instructions will probably be more useful to your specific needs.

## Toolbar

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The toolbar is a row of icons located above the form. These icons include most of the controls you will use for navigating and printing the electronic version of the CMS 855 forms.

Please note: the 'Previous' and 'Next' buttons will not activate the edit check feature. To utilize the edit check/validation feature, see the "Edit check/Validation" section, page [25](#).

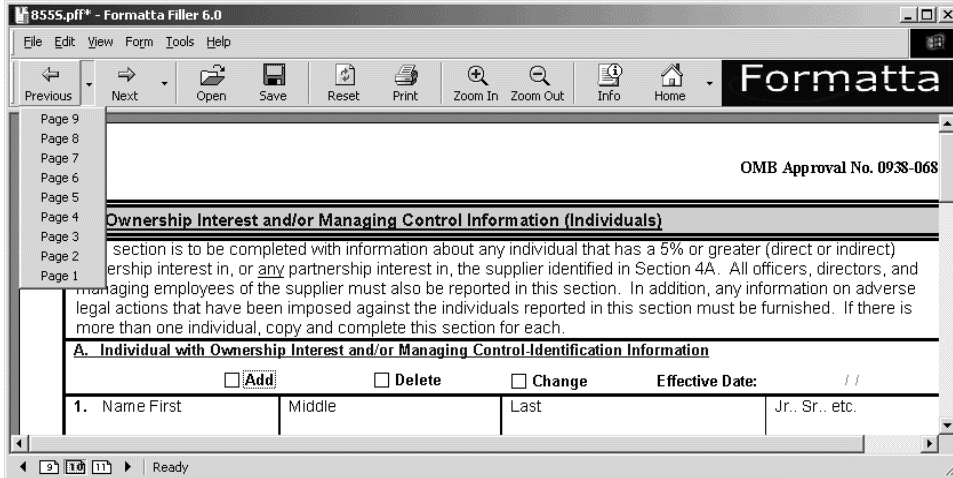
## Previous



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



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



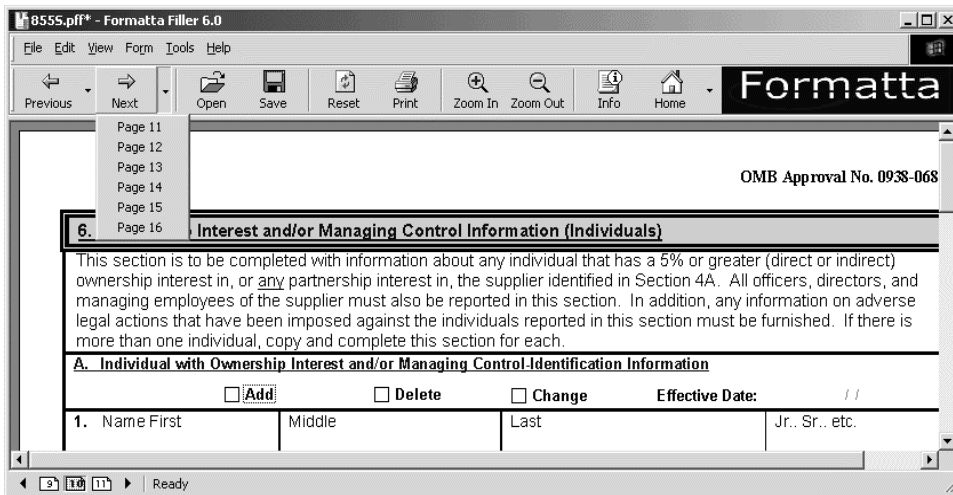
**Previous**

**Next**



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 ahead. To do this, click on the small triangle on the right edge of the 'Next' button and a pull-down menu appears, with a list of all upcoming pages. Select the page you wish to view.



**Next**

**Open**



This allows you to open a form in Formatta. Formatta only allows you to have one form open at a time. Prior to opening another form, Formatta will ask you if you want to save the current form. It will then close the current form before opening the new one.

### Save



Selecting 'Save' from the toolbar allows you to save your form to your local hard drive. You can also press [CTRL] + [S], or select "Save" from the file menu.

To make a separate version, select the "Save as" selection from the menu bar.

### Reset



The reset button allows you to clear all data entered in the form, not just the current page. Do not select this, unless you wish to create a clean form.

If you accidentally hit this button you can recover from it. To do this, immediately close the window (by selecting the 'x' in the upper right hand corner of the form). You will be asked if you want to save changes to the form. Select 'no.' You will lose all information entered since the last time you saved.

### Print



The print button allows you to print your form. NOTE: At any time, to print out a single page or a range of pages, you can use your keyboard. To do this, press and hold the [CTRL] button while pressing [P].

### Zoom In



Clicking on this button allows you to zoom in for a closer view of your form.

### Zoom Out



Clicking on this button allows you to zoom out for a complete view of your form.

### Info



This will reveal the same information as the 'summary info' from the FORM menu option.

### Home



Displays your Internet browser and automatically navigates to Formatta's website. For the Formatta section 508 compliance information, use the drop down arrow and select it.

### Formatta logo



Clicking on the Formatta logo displays your Internet browser and automatically navigates to Formatta's website.

You can also navigate by right clicking on your mouse. This gives you the option to move to the previous or next page, to the first or last page, or to zoom in or out.

### ***Status bar***

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The status bar is located at the bottom left of the form. The numbers indicate which page you are on. The current page will have a red number. To browse by page using this feature, use your mouse and click on the page number you wish to view. You can also use the arrow buttons on either side of the page numbers to move forward and backward through the pages. When you click on a specific page number, that page will be displayed.

## Reporting a Change of Information

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.

The edit check feature does not apply to your situation because you do NOT have to complete the entire form—only your change(s). 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. See page [32](#) for more information on using the 'Previous' and 'Next' buttons.

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.'

## Frequently Asked Questions

Q1: What is an executable file?

A1: An executable is a file that contains a program. When you open the file, you cause the program to run.

Q2: Do I need to download another file if I need a clean form?

A2: If you download a form and save data directly onto that form, and then wish to have a clean version, you can use the Reset button to create a blank form. To do this, open the form with the data on it, click Reset, then select "Save" from the pull-down menu. This gives you a prompt to "Save as," allowing you to create a new, clean form. When you return to the original form, close the window (by selecting the 'x' in the upper right hand corner of the form). You will be asked if you want to save changes to the form. Select 'no.' You will lose all information entered since the last time you saved.

Q3: What if I need more space to complete a page on the electronic form?

A3: You can use your computer to generate and complete a clean page. To do this, select "File", then "Save as," and give the file a new name to create a new form. In the new form, click the 'Reset' button to clear the form. Go to the page or pages you require, fill them out, print, and include them with the rest of the printed CMS form.

Q4: What if I want to print just one page?

A4: To print out a single page or a range of pages, press and hold the [CTRL] button while pressing [P].

Q5: What if I am just changing information rather than enrolling for the first time?

A5: See 'Reporting a Change of Information' on page [36](#).

Q6: Do I need to install Formatta Filler 6.0 each time I download a form?

A6: No. Once Formatta Filler 6.0 is installed on your computer, it does not need to be reinstalled.

Q7: I have filled out the form, using the 'Previous' and 'Next' buttons at the top of the screen to navigate. Is this okay?

A7: If you complete a form and have not used the gray validation buttons (validate and continue), you will not have utilized the edit check feature. To help ensure you have completed the most important questions, be sure to use the 'Validate' buttons.

Q8: What do I do if there is data on the form from a previous user?

A8: Open the form that you wish to use. Click the "Reset" button. Go to the FILE pull down menu from the menu bar and select "Save as." When the prompt appears, click on the destination selector and choose your desktop as the 'save in...' location. Change the file name to the appropriate name, making sure you

retain the “.pff” extension as the last part of the name. Select “Save.” You will now be working in the newly named and saved file.

Q9: After opening the instructions, how do I return to the form?

A9: 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.

Q10: Should I click on the 855X.exe file to open the form?

A10: Opening the 855X.exe file will not open the form. Instead, this will reinstall the CMS 855X form and erase all information previously entered in the form. To avoid this situation, please delete the 855X.exe file after installation.

## Resources

To access the enrollment forms (PDF and electronic versions), go to: <http://cms.hhs.gov/providers/enrollment/>. You can also contact your local Medicare contractor who can mail you the enrollment package or answer any additional questions.

You can find your local contractor at:

<http://cms.hhs.gov/providers/enrollment/contacts/>.