CMS **Enterprise Identity Management (EIDM)**

User Guide

Working Copy Version 0.1 Release 14 Final

Note: Working Copy versions delivered to the client for review will be published as a Major Version.

Client has agreed to review these documents as as-is, ongoing, "work-in-process" drafts and working copy versions.

Issued: June 2016

This page is intentionally blank.

Table of Contents

1. INTRODUCTION 1
What is EIDM? 1
What is the EIDM User Guide? 1
2. BEFORE YOU BEGIN 2
Setup Considerations 2
Verify Your Computer Settings 2
What you may need before you begin 3
3. USER INSTRUCTIONS 5
How to Register and Create a User ID and Password 5
How to Login 10
How to Request Access 13
The Application Access Catalog 13
Access Catalog Features 15
How to Request a Role 16
How to Cancel a Pending Role Request 31
Identity Verification 36
Identity Cannot be Verified 40
Multi-Factor Authentication (MFA) Registration 42
Optional Multi-Factor Authentication (MFA) 45
How to Check the Status of a Pending Request 46
How to View and Change Your Access 48
How to View/Modify Your Business Contact Information 48
How to View/Modify Your Existing Role Information 51
How to Replace an Existing Role with Another Role 58
How to Remove a Role 59
How to Add a Role 62
How to Unlock Your Account 66
How to Change Your User Profile 70
Forgot Your User ID? 70
Forgot Your Password? 72
How to View Your Profile 75
How to Change Your Password 76
How to Change Your E-mail Address 78
How to Change Your Security Challenge Questions and Answers 80
How to Change Your Phone Number 82
How to Change Your Home Address 84
4. HELP DESK INFORMATION 86
Application Help Desks 86
5. ACRONYMS 89

List of Tables

Table 1: Application Help Desks 88
Table 2: Acronyms..... 91

EIDM User Guide

1. Introduction

The Centers for Medicare & Medicaid Services (CMS) is a federal agency that ensures health care coverage for more than 100 million Americans. CMS administers Medicare and provides funds and guidance for all of the 50 states in the nation, for their Medicaid programs and Children's Health Insurance Program (CHIP). CMS works together with the CMS community and organizations in delivering improved and better coordinated care.

What is EIDM?

CMS has established the Enterprise Identity Management (EIDM) system to provide our Business Partners with a means to apply for, obtain approval, and receive a single User ID they can use to access one or more CMS applications.

What is the EIDM User Guide?

This EIDM User Guide provides step-by-step instructions on how to register in EIDM, how to obtain access to an application and request a role, and how to manage your user profile.

2. Before You Begin

Setup Considerations

The following steps are recommended to optimize computer settings and ensure proper access to the CMS system:

1. **Screen Resolution**: CMS screens are designed to be viewed at a minimum resolution of 800 x 600. Your resolution is the number of pixels your monitor displays horizontally and vertically and is generally expressed as width times height (e.g., 800 pixels wide x 600 pixels high or 800 x 600). The more pixels that display, the better your on-screen text and images will look.
2. **Plug-Ins**: Verify that your computer has the latest version of JAVA and ActiveX installed.

Note
You should verify the latest versions of JAVA or ActiveX by going to the JAVA website (www.java.com) and Adobe website (www.adobe.com), or by contacting your internal IT Help Desk.

3. **Pop-up Blockers**: Verify that your browser's pop-up blockers are disabled.
4. **Supported Browsers**: EIDM supports Internet Explorer versions 8-11, Firefox, Google Chrome, and Safari.

Verify Your Computer Settings

This section outlines the steps to verify your computer settings.

	Action
Step 1	Verify your screen resolution. **Windows Vista:** Select the **Start** button, select **Control Panel**, find **Appearance and Personalization**, and select **Display Settings**. Ensure the correct monitor is currently selected. Note your settings below the horizontal **Resolution** slider and select **Cancel** to leave your settings as they are. **Windows 7 and 8:** Select the **Start** button, select **Control Panel**, find **Appearance and Personalization**, and select **Adjust Screen Resolution**. Ensure the correct monitor is selected in the **Display** drop-down list. Below that list, the **Resolution** drop-down list displays your setting. Note this setting and select **Cancel** to leave your settings as they are.
Step 2	Install the latest version of JAVA and ActiveX. **JAVA:** Open your browser, navigate to java.com, select **Free Java Download**, select **Agree and Start Free Download**, open the download, accept the terms, and select **Install**, select

Action
Next, wait for the program to install, and select **Close**.
ActiveX:
Open your browser, navigate to get.adobe.com/flashplayer, select **Adobe® Flash® Player system plug-in**, select **Install Now**, open the download, select **Run**, accept the terms, and select **Next**, wait for the program to install, and select **Finish**.
Step 3 Disable you browser's pop-up blockers.
Internet Explorer 8:
Open your browser, select the **Tools** button, point to **Pop-up Blocker**, and select **Turn Off Pop-up blocker**.
Internet Explorer 9, 10, and 11:
Open your browser, select the **Tools** icon, select **Internet options**, open the **Privacy** tab, uncheck the **Turn on Pop-up blocker** checkbox, and select **OK**.
Firefox:
Open your browser, select the **Menu** icon, select **Content** in the navigation pane, find the **Pop-ups** section, and uncheck the **Block Pop-up windows** checkbox.
Chrome:
Open your browser, select the **Menu** icon, select **Settings**, select **Show Advanced Settings**, find the **Privacy** section, select **Content Settings**, find the **Pop-Ups** section, select **Allow all sites to show pop-ups**, and select **Done**.
Safari:
Open your browser, select the **Safari** button, select **Preferences**, open the **Security** tab, find the **Web content** section, and uncheck the **Block pop-up windows** checkbox.

What you may need before you begin

Prior to requesting access, you should have received instructions from your organization or CMS contact. The instructions should include application specific information you may need to complete the request, such as:

- Social Security Number (SSN) / Taxpayer Identification Number (TIN)
- Legal Business Name (LBN) or Organization
- Application Name
- Application Role
- Other information specific to your application, for example, Contract Number, Gentran Mailbox, National Provider Identifier (NPI), Organization number.
- You will have to create a user ID and password of your choosing if you do not already have a user ID and password. EIDM allows you to create a User ID up to 74 characters; however, some applications have restrictions on the number of characters, and special characters, you can have in the User ID you create. Check with your CMS point of contact to identify restrictions for your application.

- Not every CMS application requires the same information, so it is important to get the specifics directly from your organization or CMS contact.

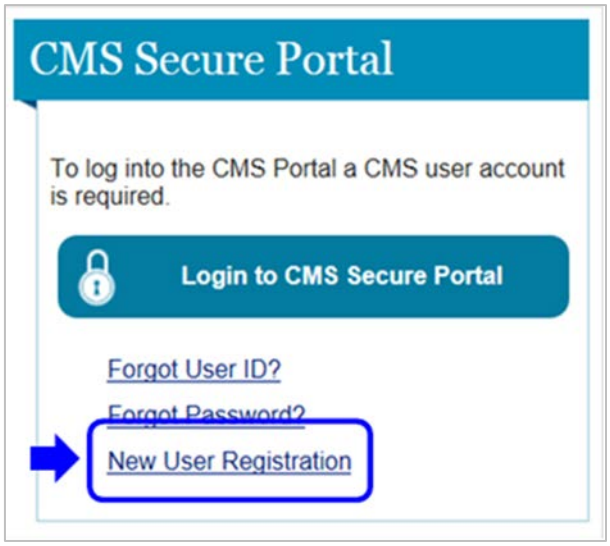
3. User Instructions

How to Register and Create a User ID and Password

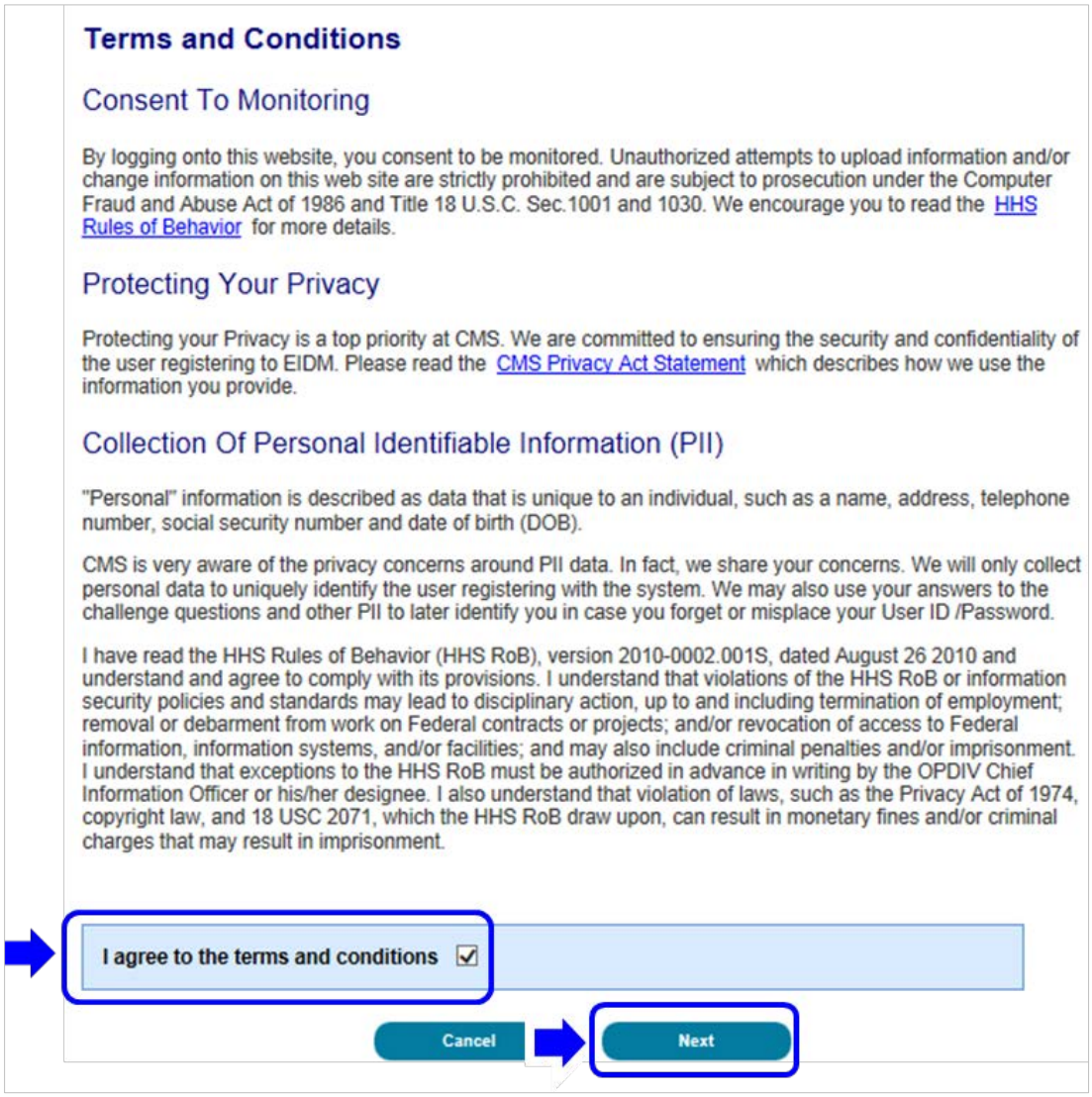
This section provides information on how to register and create a user ID and password. The following are the basic step-by-step instructions.

	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.

Step 2	Select the **New User Registration** link.



	Action
Step 3	Read the **Terms and Conditions**, select **I agree to the terms and conditions**, and then select **Next** to continue with the registration process.



Terms and Conditions

Consent To Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the HHS Rules of Behavior for more details.

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the CMS Privacy Act Statement which describes how we use the information you provide.

Collection Of Personal Identifiable Information (PII)

"Personal" information is described as data that is unique to an individual, such as a name, address, telephone number, social security number and date of birth (DOB).

CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal data to uniquely identify the user registering with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

I agree to the terms and conditions ☑

Cancel Next

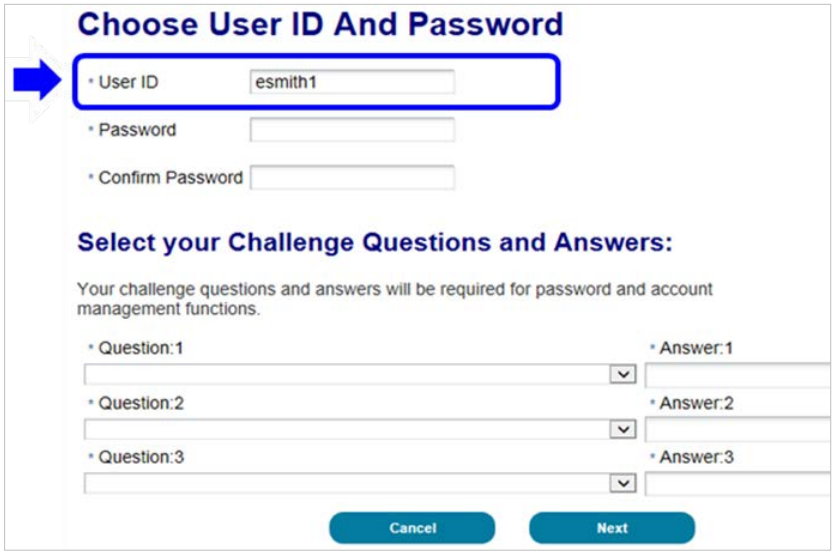
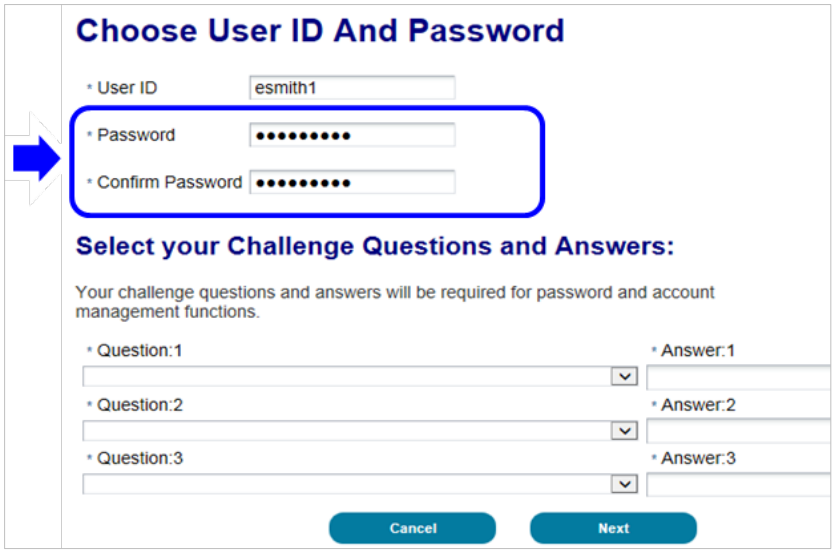
Action	
Step 4	The **Your Information** page is displayed.

Provide the information requested on the **Your Information** page. The fields with an asterisk (*) are required fields and have to be completed.

After all required information has been provided, select **Next** to continue.

Note

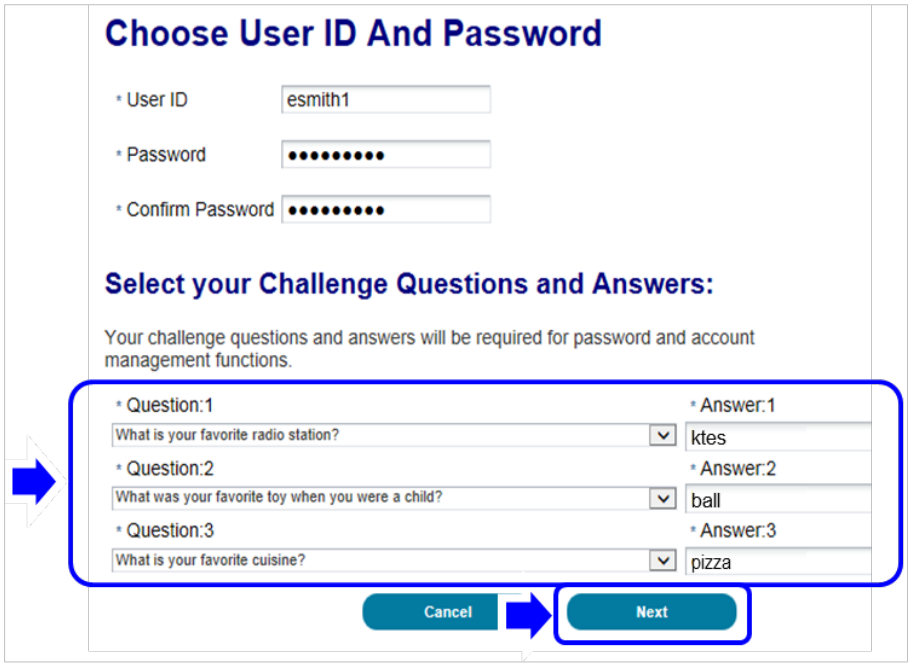
You may select **Cancel** at any time to exit out of the registration process. New information or changes entered will not be saved.

	Action
Step 5	After providing the required information on the **Your Information** page, the **Choose User ID and Password** page is displayed. Create and enter a user ID of your choice, based on the requirements for creating a user ID. **Note** EIDM will display instructions on what you are required to include in your user ID. 
Step 6	Create and enter a password of your choice. **Note** EIDM will display instructions on what you are required to include in your password. Enter the same password in the **Confirm Password** field. Note: The passwords must match before you can continue. 

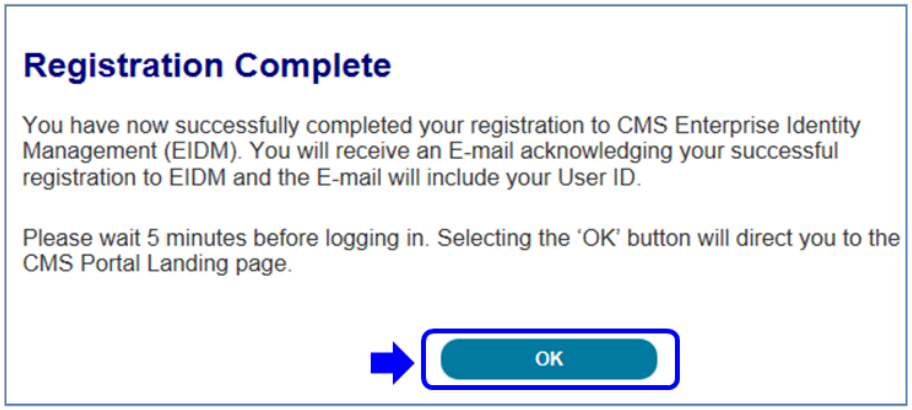
	Action
Step 7	After entering the user ID and password you have created, select a question of your choice in the **Select your Challenge Questions and Answers** section and enter the answer you want to be saved with the question. Continue to select a question and enter an answer for Question 2 and Question 3. Select **Next** to complete the registration process.

Note

You may select **Cancel** to exit out of the registration process. New information or changes entered will not be saved.



Step 8	After selecting **Next**, the **Registration Complete** page is displayed and informs you that you will receive an E-mail acknowledging your successful registration and will include your user ID. Select **OK** to close the **Registration Complete** page.

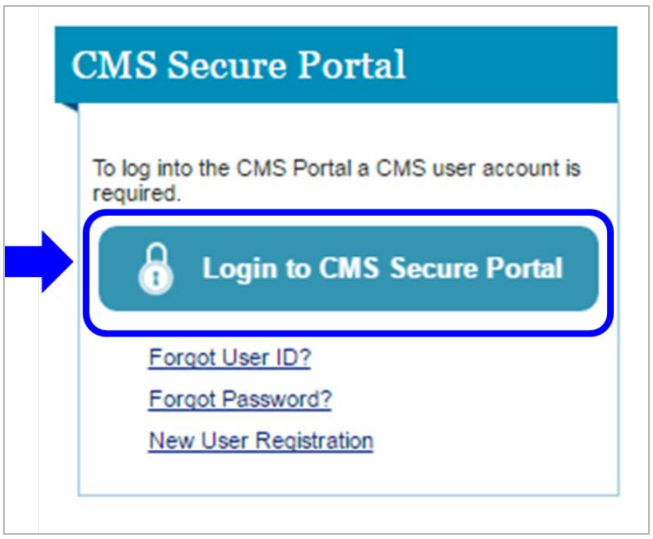


How to Login

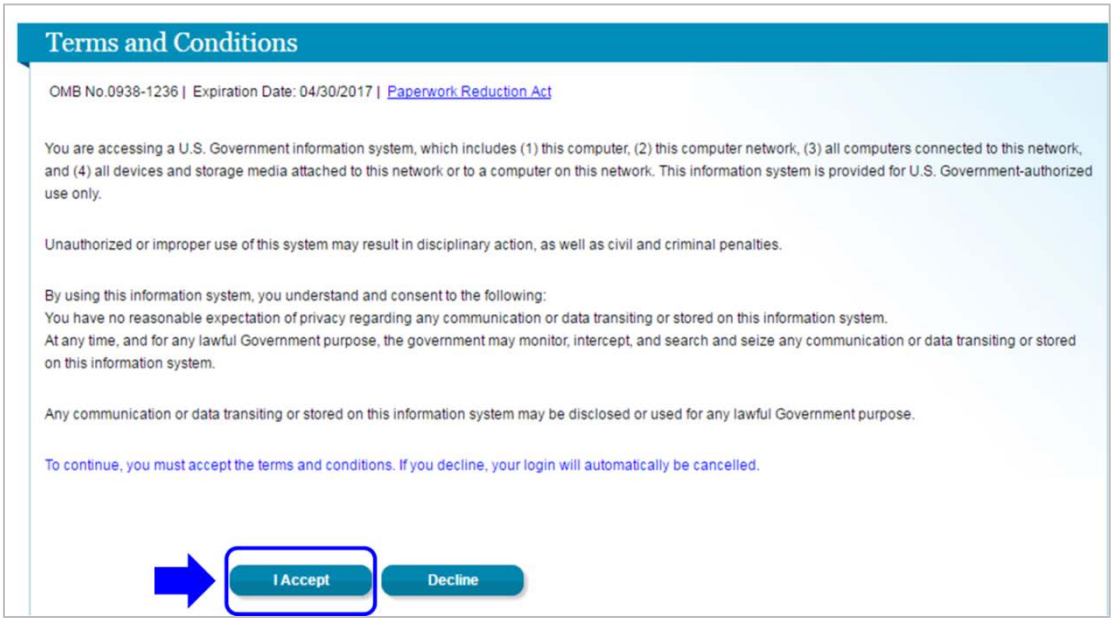
This section provides information on how to Login using your user ID and password. The following are the basic step-by-step instructions.

	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.

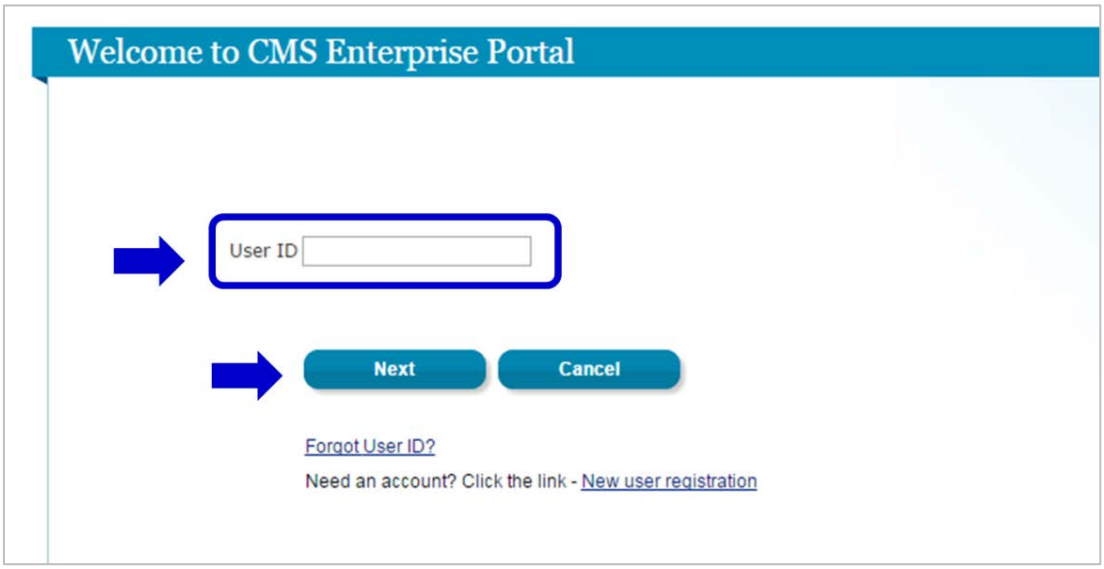
Step 2	Select **Login to CMS Secure Portal**.



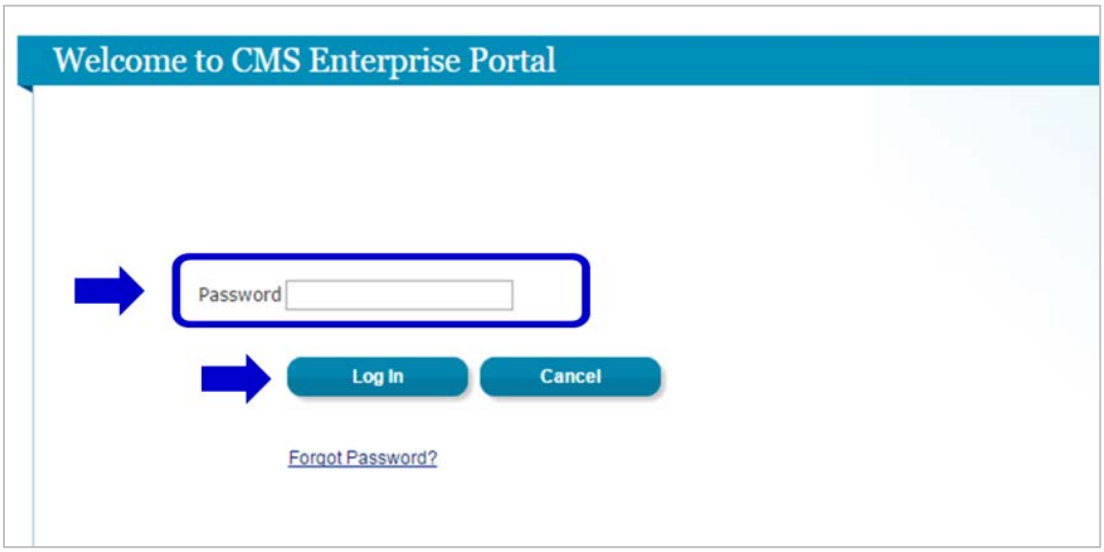
	Action
Step 3	Read the **Terms and Conditions** and select **I Accept** to continue.



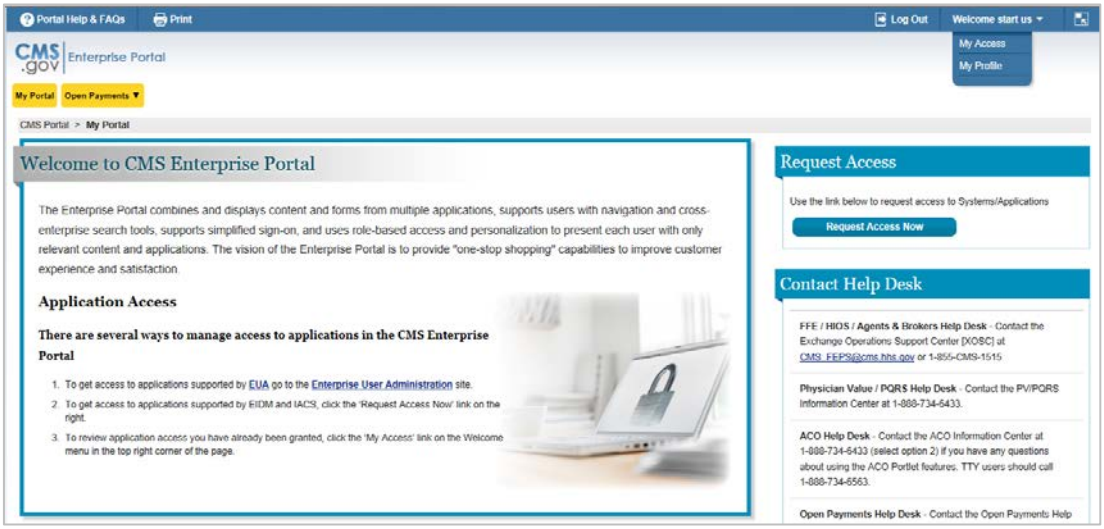
Step 4	Enter your **User ID** and select **Next** to continue.



Action	
Step 5	Enter your **Password** and select **Log In**.



After logging in, the **Welcome to CMS Enterprise Portal** page is displayed.



How to Request Access

This section provides basic step-by-step instructions and assistance on how to request access to an application and a role.

> **Note**
> If you do not have a user ID and password, you will have to register and create a user ID and password. Please follow the steps under How to Register and Create a User ID and Password.

Each application is different and may require you to enter or select information not indicated in the basic step-by-step instructions in this User Guide.

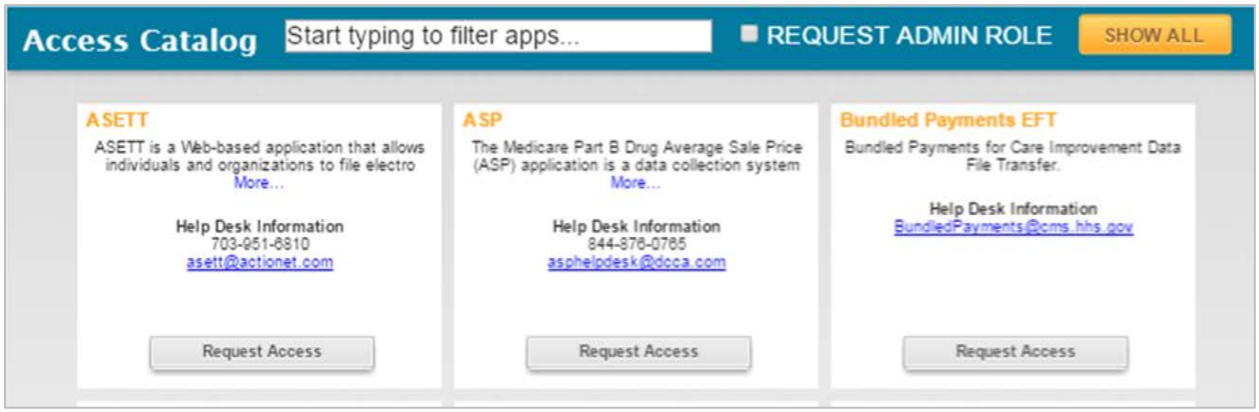
What if my application requires me to provide additional information that's not included in the basic step-by-step instructions?

After following the instructions for How to Register and Create a User ID and Password, EIDM will prompt you to enter or select any additional information needed, based on the application and role you are requesting. In addition, EIDM will display help messages to assist you in completing your requests.

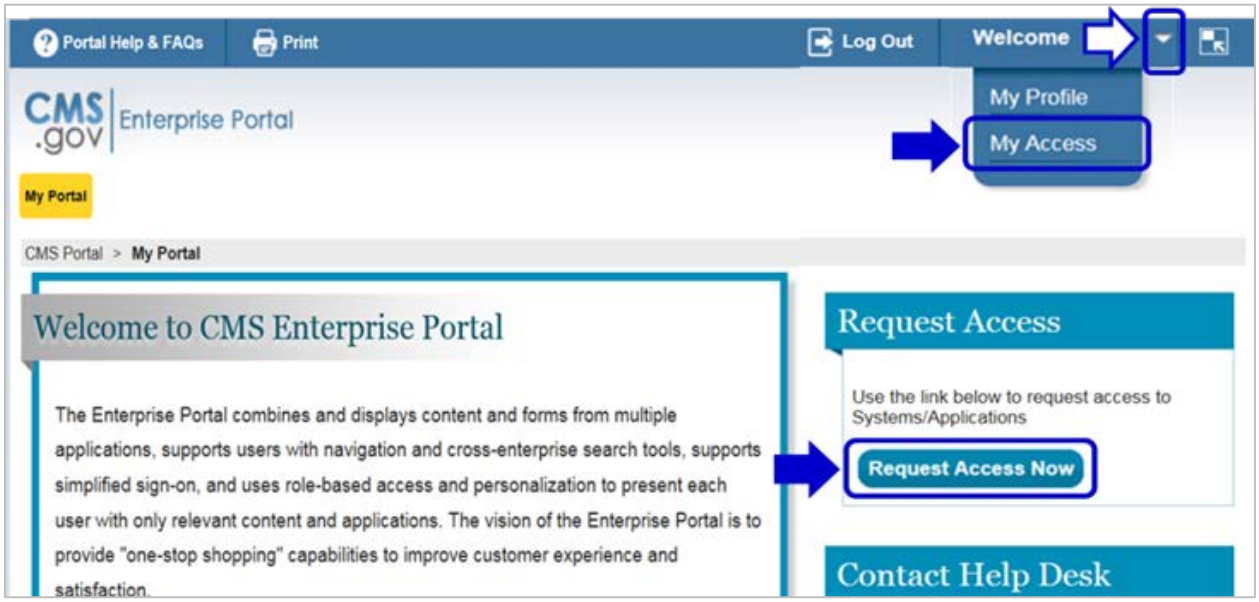
> **Note:**
> If you currently have a role in an application and you need to request access for another role in the same application, please follow the step-by-step instructions for How to Add a Role.

The Application Access Catalog

The application **Access Catalog** displays all the CMS applications that use EIDM services. Registered users who are logged into EIDM can use the catalog to request access to applications, and select from a number of additional options that are described in more detail below.



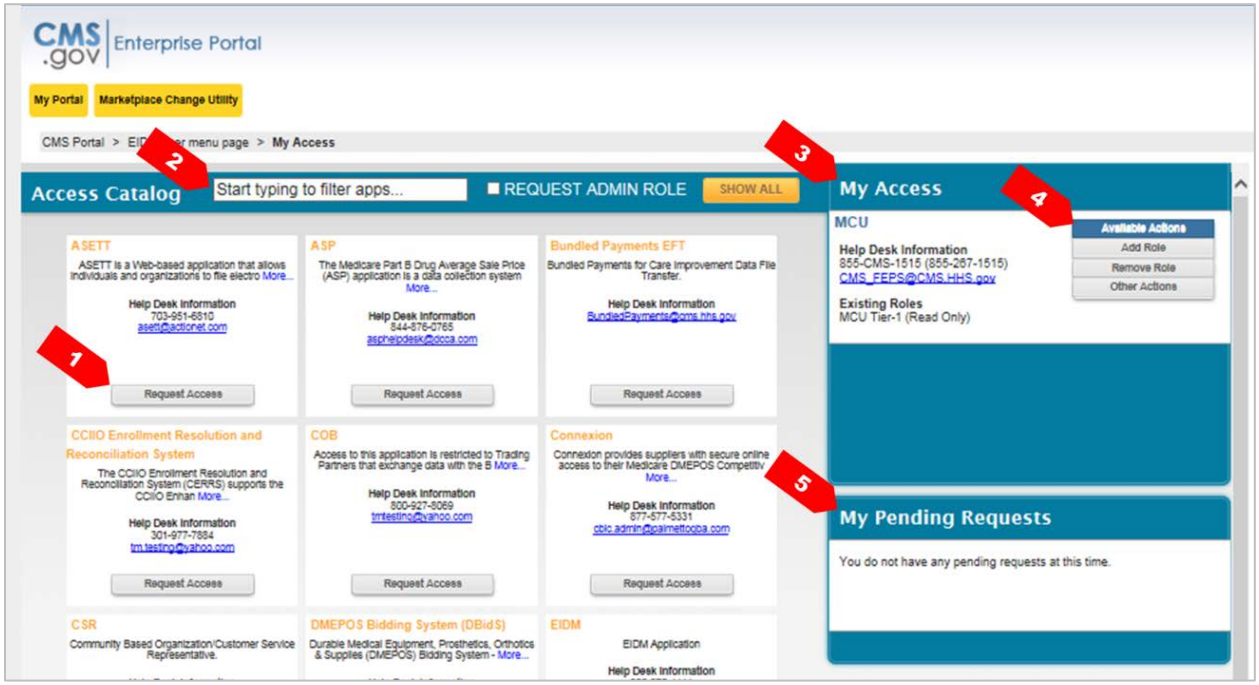
The catalog is accessed by selecting the **My Access** option from the CMS My Portal home page drop-down menu or by selecting the **Request Access Now** button as shown in the image below. Requesting access is covered in more detail in the section titled **How to Request a Role** that follows.



Access Catalog Features

The features listed below refer to the numbered image that follows.

1. **Request Access** – Request access to a particular application by selecting the **Request Access** button on the application's tile.
2. **Search** – Search for a particular application by typing the name of the application in the search box on the **Access Catalog** title bar.
3. **My Access** – This panel displays information for each application for which the user has access including:
    a. Contact information for the application's Help Desk.
    b. The existing roles the user has been granted for the application.
4. **Available Actions** – This panel appears for each application for which the user has access. The user can select from the following options:
    a. Add a Role – Directs the user to the **Request Additional Role** screen to request an additional role for the application.
    b. Remove a Role – Directs the user to the **View and Manage My Access** screen to remove a role from the application.
    c. Other Actions – Directs the user to the **View and Manage My Access** screen to select other options.
5. **My Pending Requests** – This section lists the pending requests for which the user has requested access.



How to Request a Role

The following are the basic step-by-step instructions on how to request access to an application and a role, when you currently do not have a role in the application.

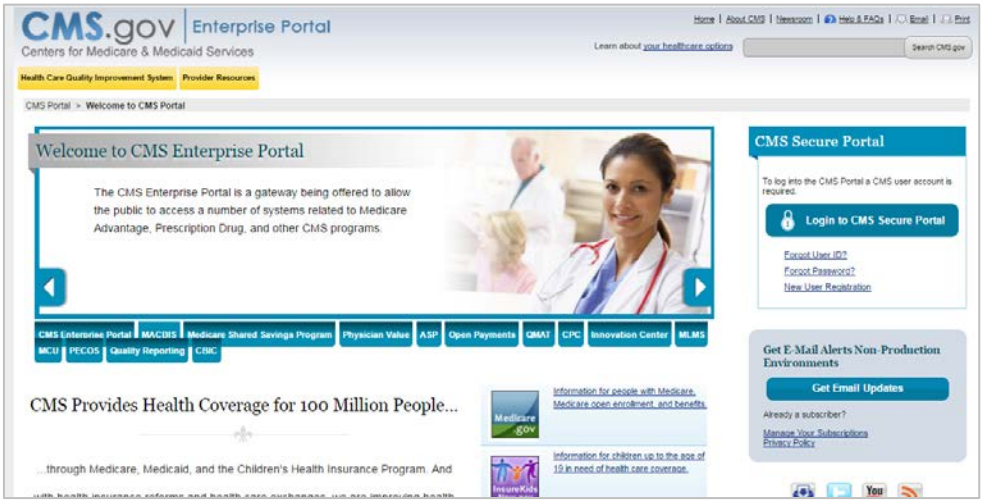
Note

To request a role for one of the applications listed below, please **BEGIN HERE**.

- ASETT
- ASP
- EPPE
- ESD
- FFM/Training– Agents/Brokers/Assisters
- IC
- IDHD
- MACPro
- MCU
- MLMS
- Open Payments
- SHIM
- T-MSIS
- zONE

To request a role for all other applications, please **FOLLOW THESE STEPS**.

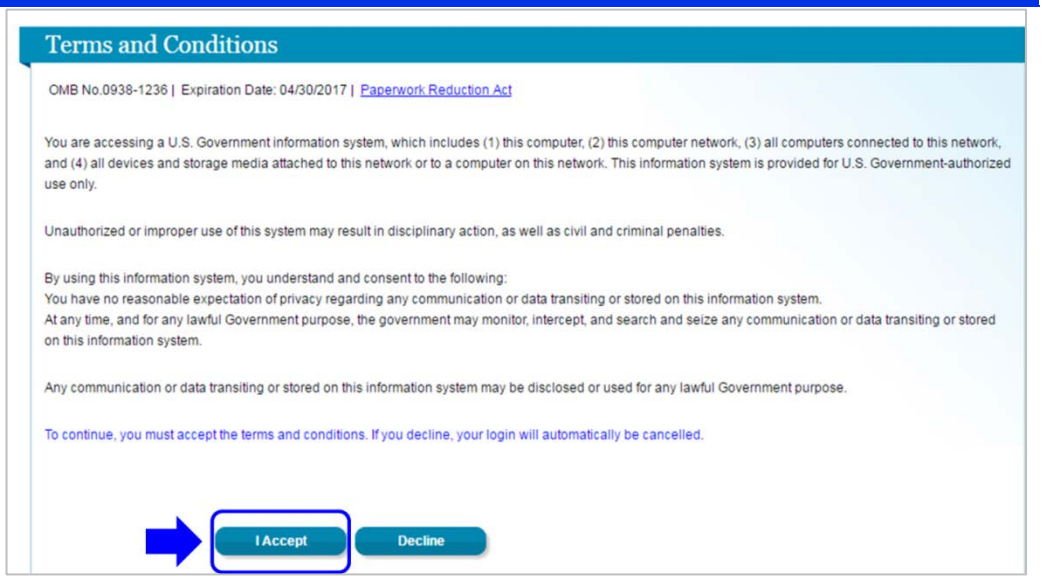
	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.



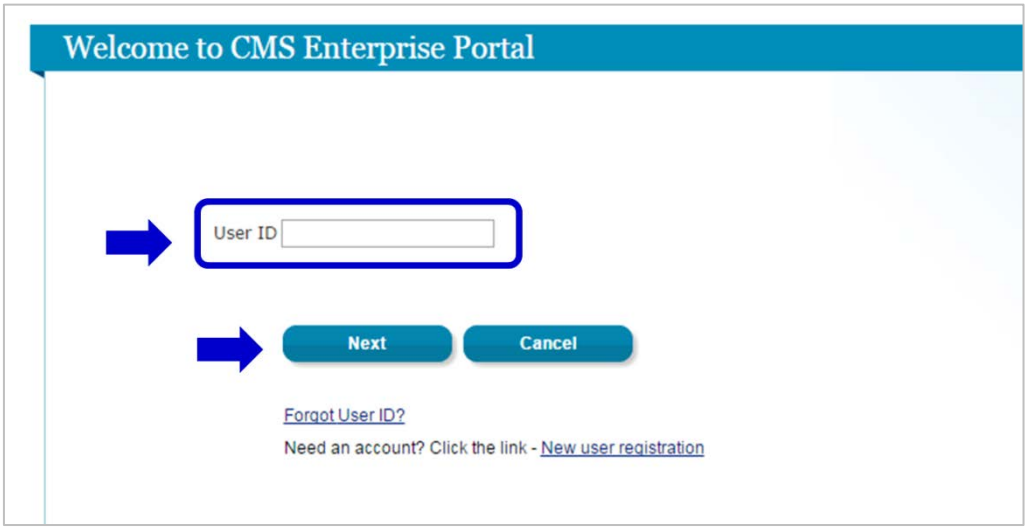
Step 2	Select Login to CMS Secure Portal.

Step 3	Read the **Terms and Conditions** and select **I Accept** to continue.

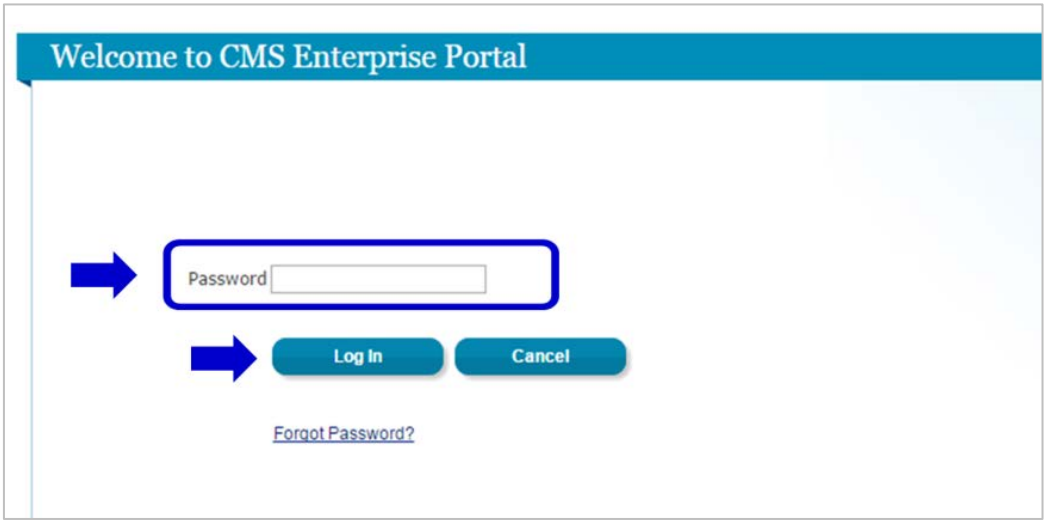
Action



Step 4 Enter your **User ID** and select **Next** to continue.



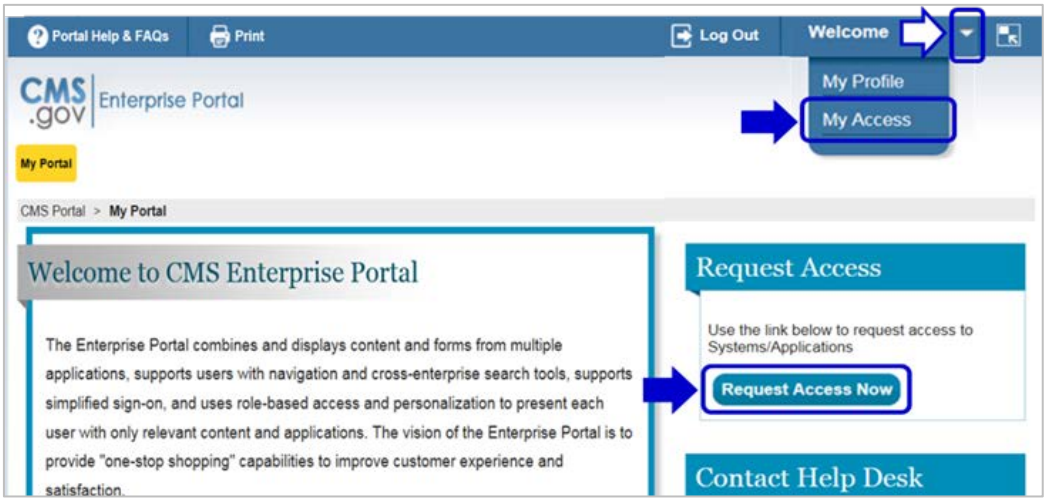
	Action
Step 5	Enter your **Password** and select **Log In**.



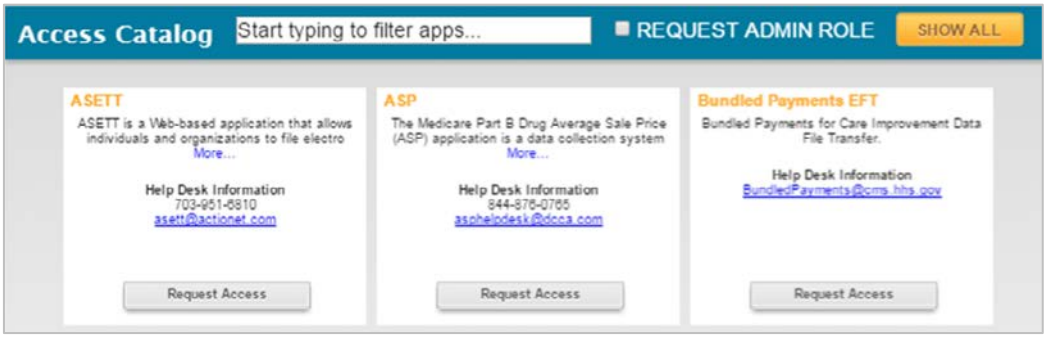
Step 6 After logging in, the **Welcome to CMS Enterprise Portal** page is displayed.

Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue.

Alternately, you may select **Request Access Now** to continue.



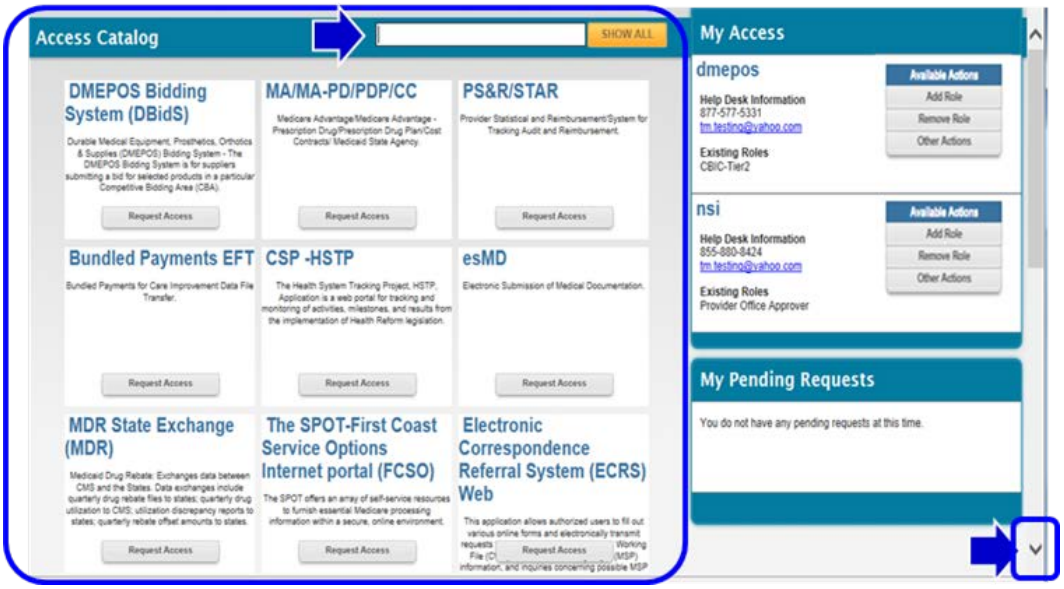
The application **Access Catalog** is displayed



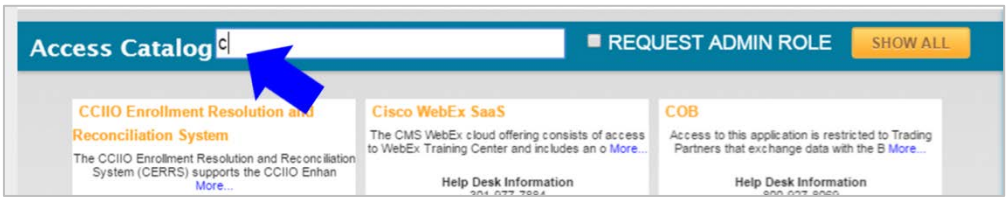
	Action
Step 7	Scroll down to locate the application you need. Alternatively, enter the first few letters of the application in the **Search** section and all of the applications beginning with those letters will be displayed.

Note

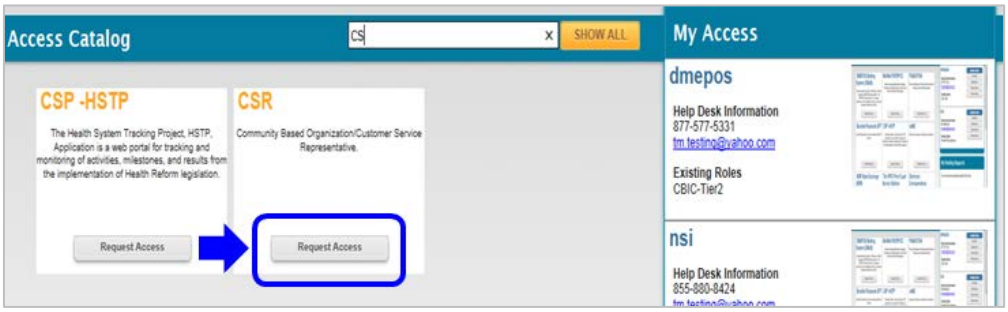
If you currently have access to one or more applications, those applications are displayed in the **My Access** section. If you have pending requests, they are displayed in the **My Pending Requests** section.



Step 8	After entering the first few letters of the application in **Search**, the applications beginning with those letters are displayed.



Step 9	Select **Request Access** for the application you need. In the example below, we will select **Request Access** for the CSR (Community Based Organization/Customer Service) application.



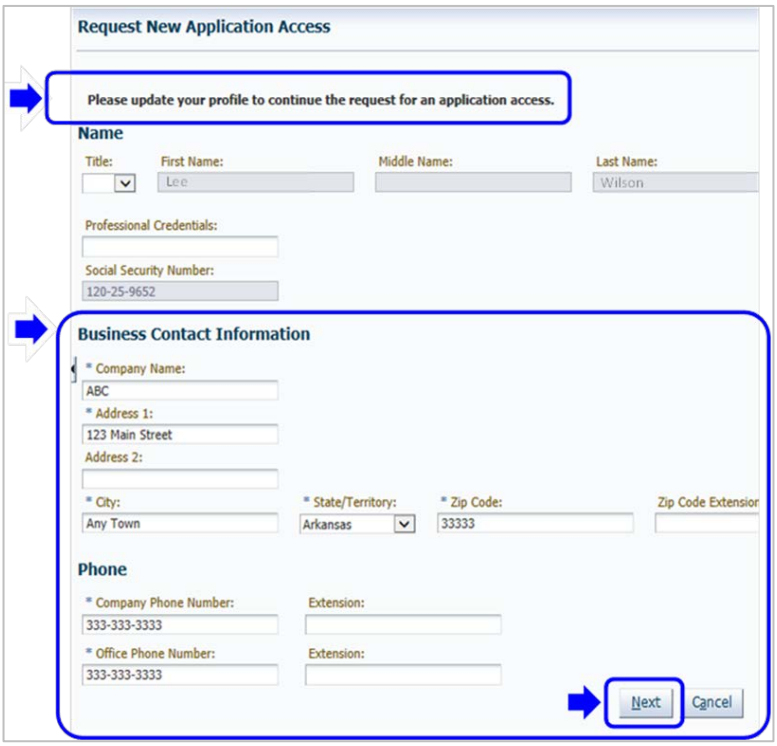
Action	
Step 10	The **Application Description** and **Select a role** sections are displayed. Select the role you need from the **Select a role** drop-down menu. In the example below, we will select **User**.

Step 11	After selecting a role, the **Request New Application Access** page is displayed. If all of your required business contact information is not on file, you will have to provide this information before you can continue. Required fields are marked with an asterisk (*) and an error message will be displayed, if the information has not been entered or selected correctly, or is entered in the wrong format.

Note

If all of your business contact information is on file, the **"Please update your profile…"** message will not be displayed and the **Select a role** drop-down menu will be displayed for you to continue.

If the **"Please update your profile…"** message is displayed, enter the required information and then select **Next**.



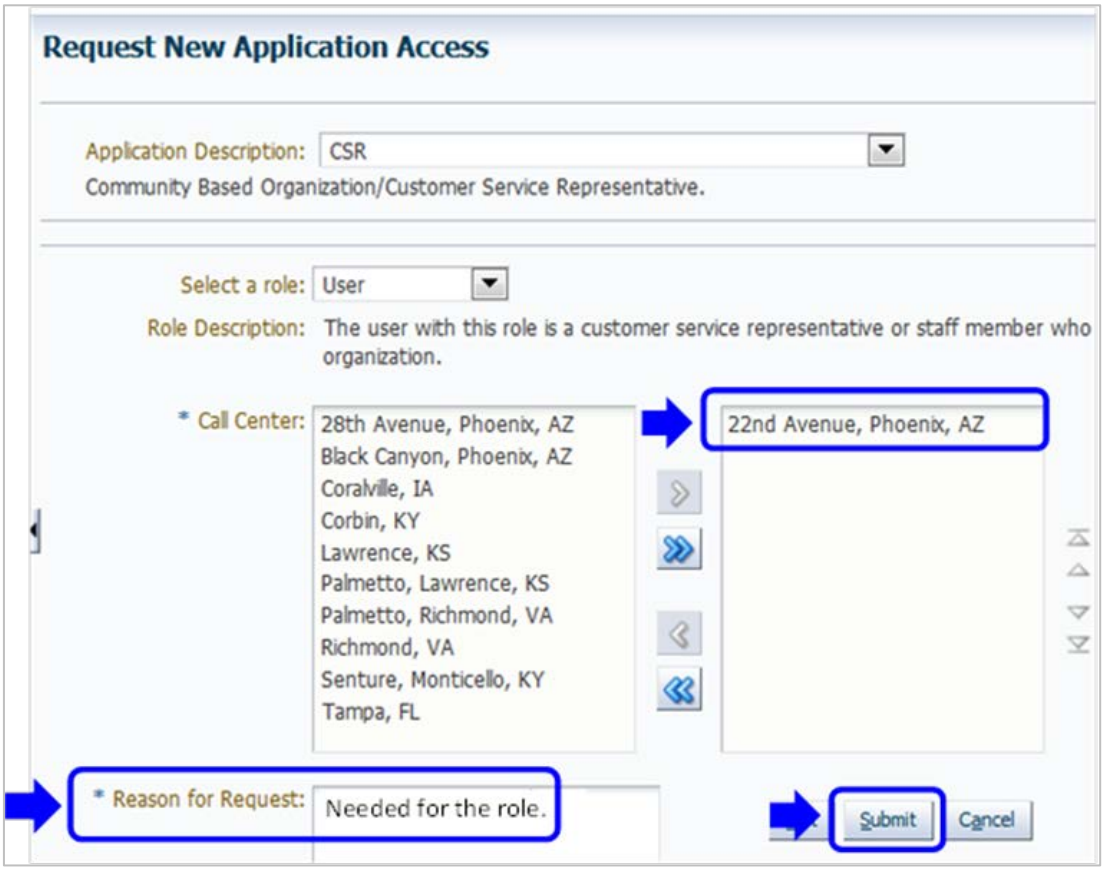
	Action
Step 12	After providing your business contact information, EIDM may ask you to provide some additional information that is required for your application and the role you have selected. Provide any additional information that is requested, enter a reason for the request in the **Reason for Request** box and then select **Submit**.

Note

What you may need before you begin

In the example below, we have selected the CSR application and the **User** role. EIDM also needs to know the Call Center. We will select 22nd Avenue, Phoenix, AZ from the list of Call Centers and then select the single right arrow icon. This will move the 22nd Avenue, Phoenix, AZ Call Center to the Selected Call Center(s) box.

We will then enter the reason for the request in the **Reason for Request** box and select **Submit** to continue the process.

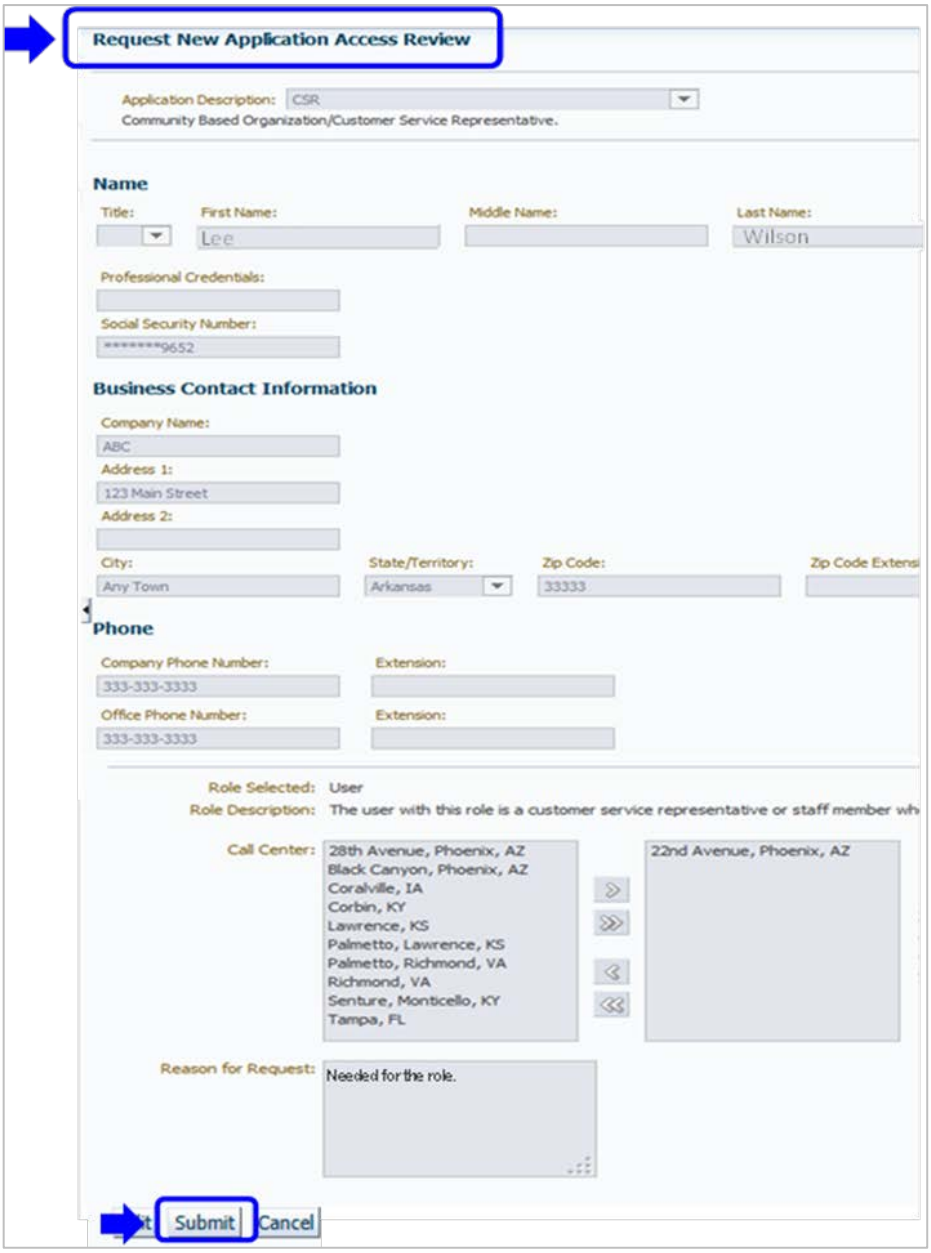


Action	
Step 13	After selecting Submit, the **Request New Application Access Review** page is displayed. Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval.

Note

You may select **Cancel** to exit out of the Request New Application Access process. New information or changes entered will not be saved.

In the example below, the information is correct. We will select **Submit** to submit the request for approval.

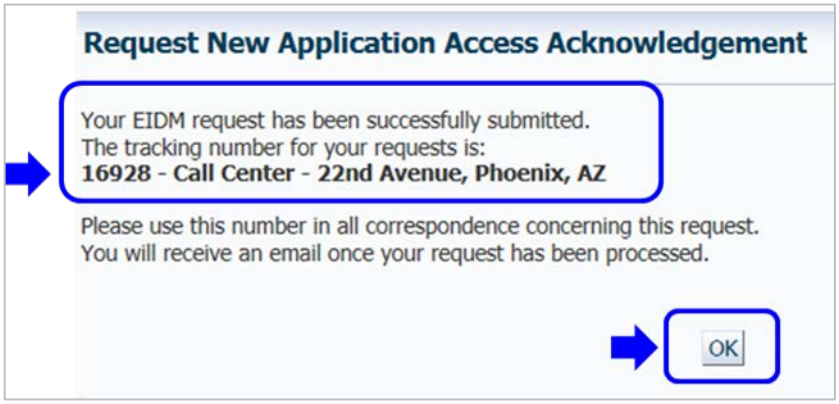


Action	
Step 14	After selecting Submit, the **Request New Application Access Acknowledgement** page is displayed. The acknowledgement page displays the tracking number for the request and informs you that you will receive an E-mail when the request has been processed.

Notes

1. If you have submitted a request for a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to change your password and create and enter an 8-character password the next time you log in, after your request has been approved. An 8-character password may be required for applications that use RACF IDs.

Select **OK** to close the acknowledgment page.



To request a role for one of the applications listed below:

Applications	
• ASETT	• MACPro
• ASP	• MCU
• EPPE	• MLMS
• ESD	• Open Payments
• FFM/Training– Agents/Brokers/Assisters	• SHIM
• IC	• T-MSIS
• IDHD	• zONE

Please **FOLLOW THESE STEPS**:

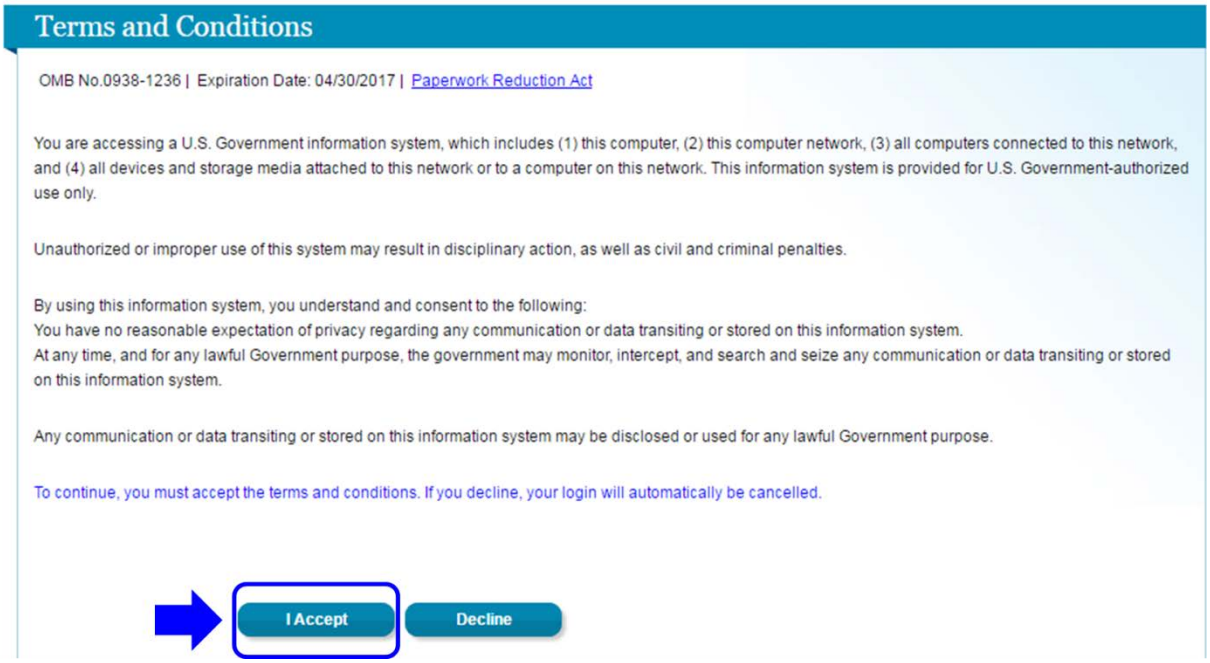
Action	
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.

Action

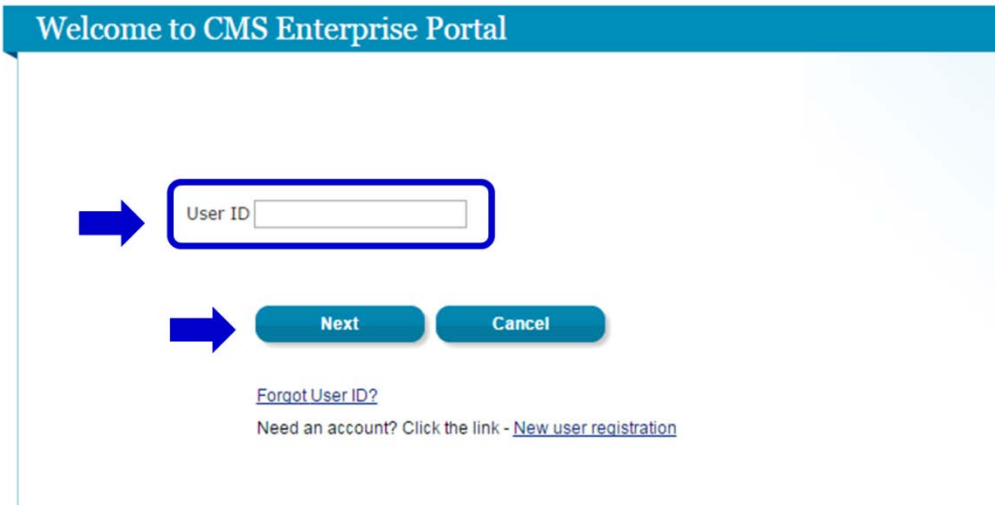
Step 2 Select **Login to CMS Secure Portal**.

Step 3 Read the **Terms and Conditions** and select **I Accept** to continue.

Action

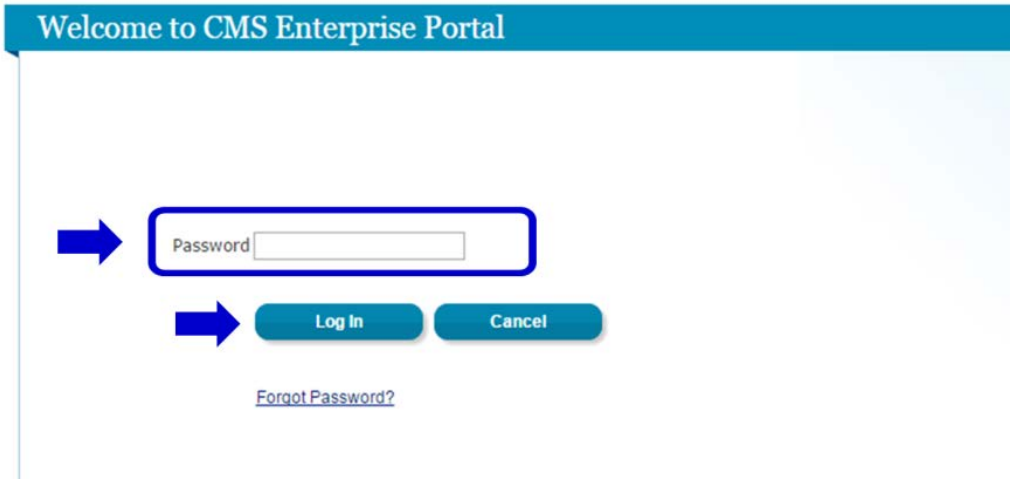


Step 4 Enter your **User ID** and select **Next** to continue.



Step 5 Enter your **Password** and select **Log In**.

Action

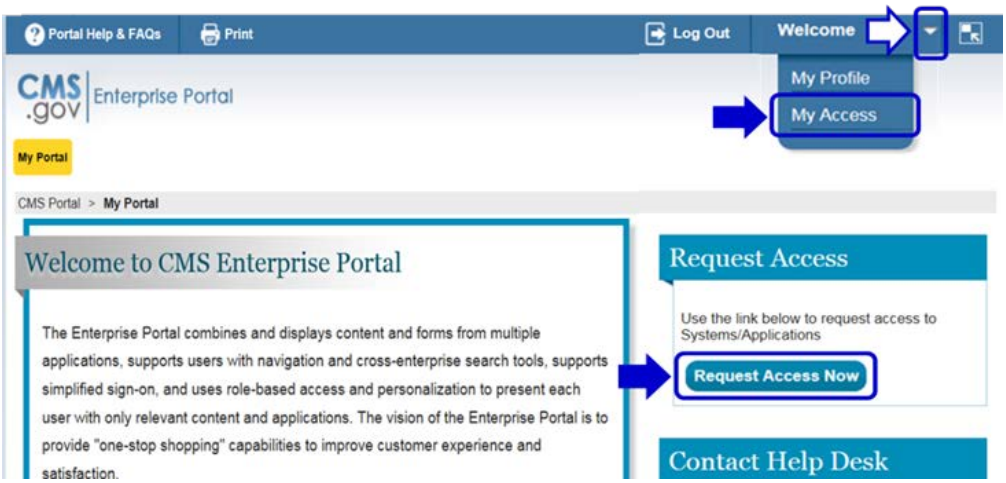


Step 6

After logging in, the **Welcome to CMS Enterprise Portal** page is displayed.

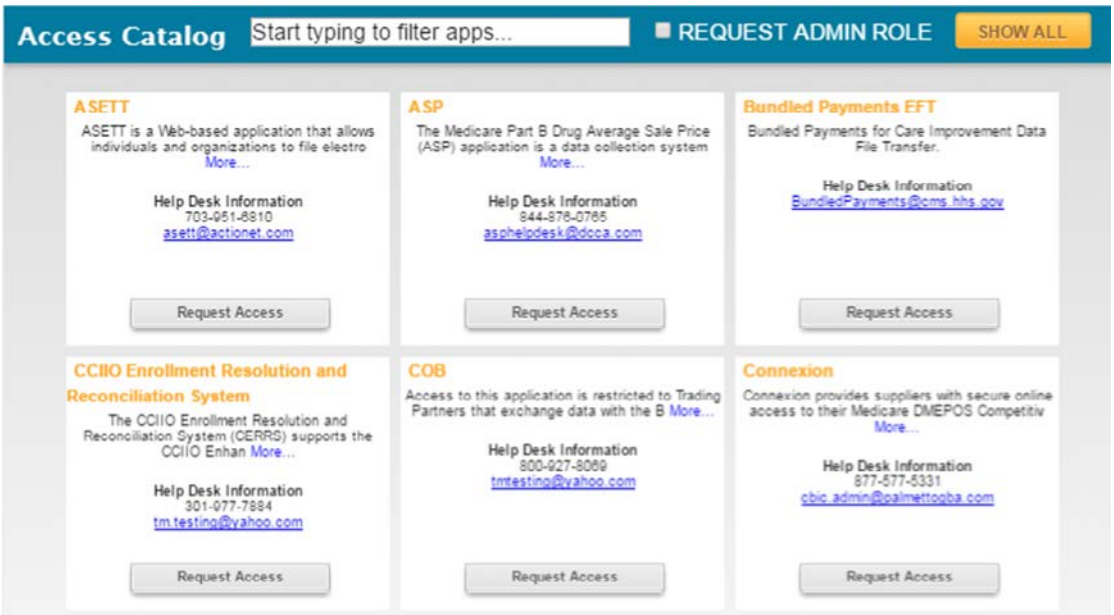
Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue.

Alternately, you may select **Request Access Now** to continue.



The application **Access Catalog** is displayed.

Action



Step 7 Scroll down to locate the application you need.

Alternatively, enter the first few letters of the application in the **Search** section and all of the applications beginning with those letters will be displayed.

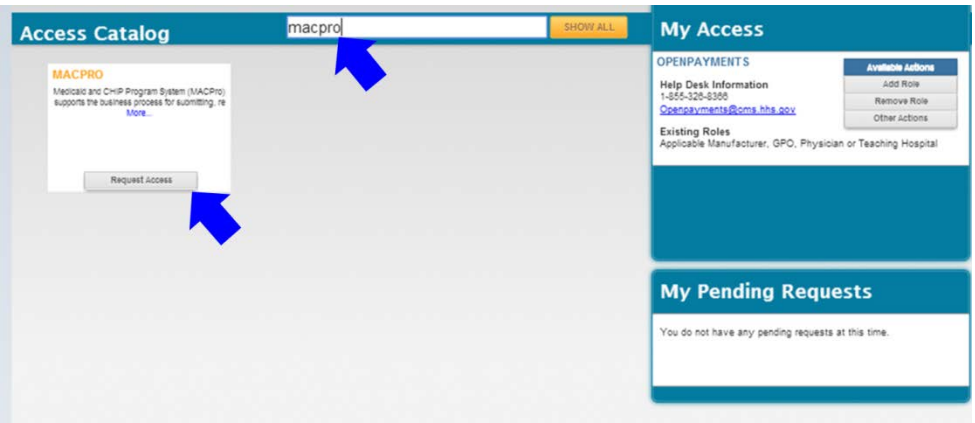
Note:

The applications are listed by their acronym not their full name. You must use the acronym of the application to search.

Note:

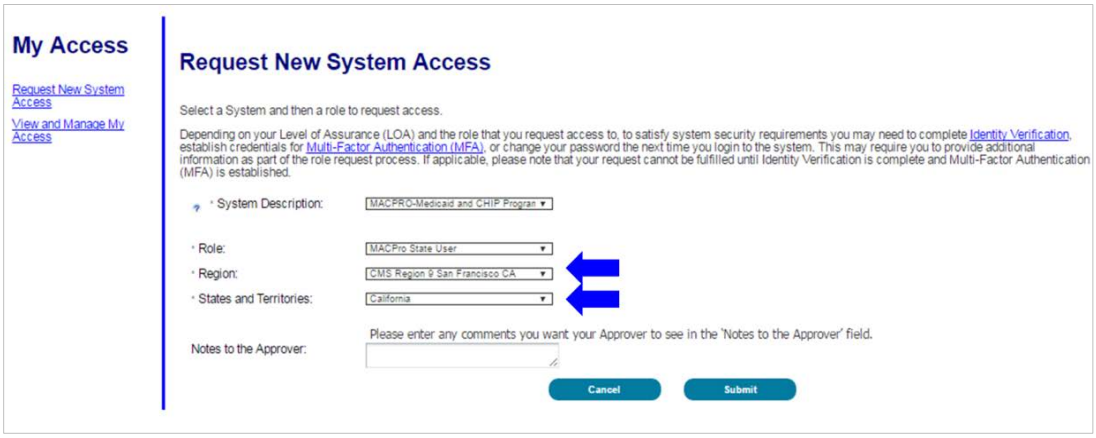
If you currently have access to one or more applications, those applications are displayed in the **My Access** section. If you have pending requests, they are displayed in the **My Pending Requests** section.

Step 8 Select the **Request Access** button on the application tile.



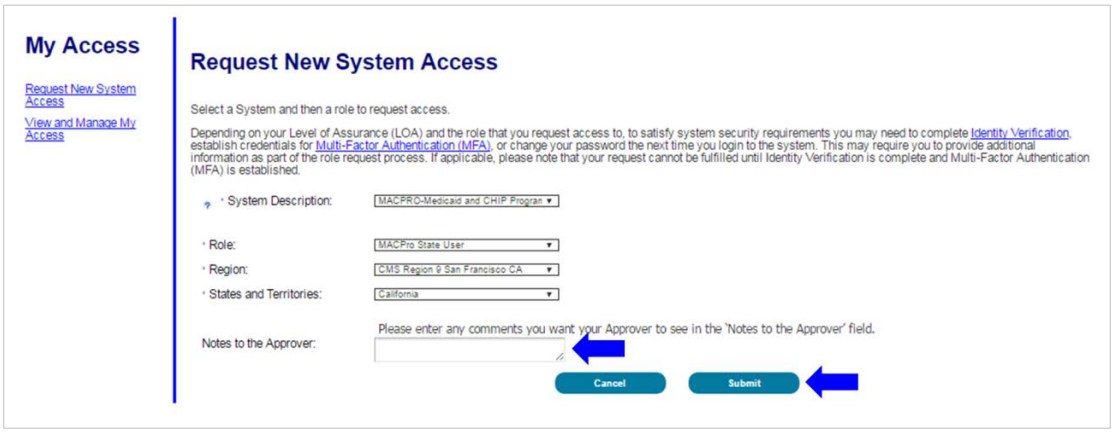
	Action
Step 9	You will be directed to the **Request New System Access** page for that application. Select a **Role** from the drop-down list.

There may also be additional information that you will need to provide to request a role, such as **State**, **Region**, **Authorization Code**, **User Type**, or other user information.



Step 10	Select the **Submit** button to submit the request. To terminate the request, select the **Cancel** button and the system will return you to the **View and Manage My Access** page. Depending on the application selected, you may have the option of entering a message in the **Notes to the Approver** field shown below.

Action



Step 11 After submitting the request, a Request Acknowledgement message will be displayed. Select the **OK** button to exit the screen and return to the **View and Manage My Access** page.

Note:

If you have selected an application that does NOT have 'automatic' online approval, the request will be evaluated by the application approver. You will receive an E-mail once the approver takes an action on the role request.

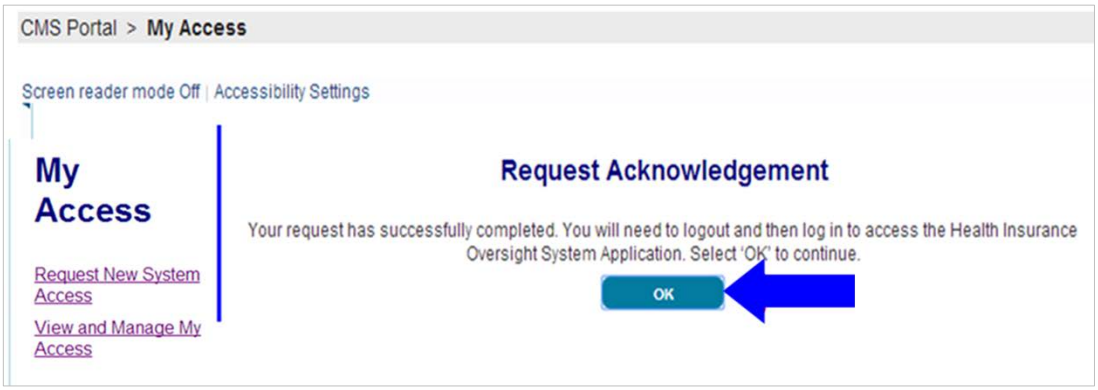
You will receive a message similar to the one shown below.

Step 12 If you have selected an application that has 'automatic' online approval and you have entered valid information, you will receive a message similar to the one below for the application that you have chosen.

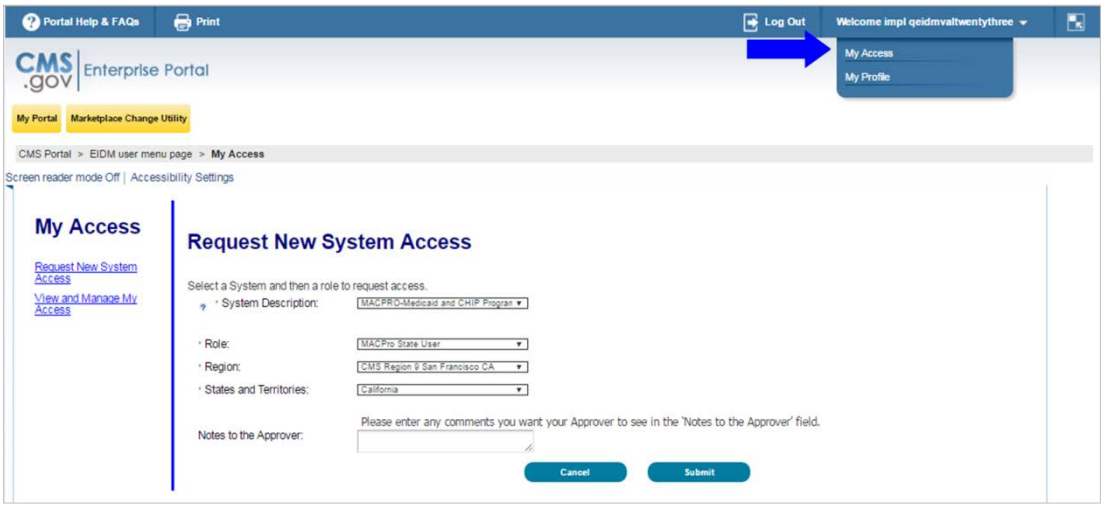
Select the **OK** button to exit the screen and return to the **View and Manage My Access** page.

Note: To access the requested application, you will need to logout and log back in.

Action



You may return to the **Access Catalog** at any time by selecting the **My Access** option from the drop-down menu.



How to Cancel a Pending Role Request

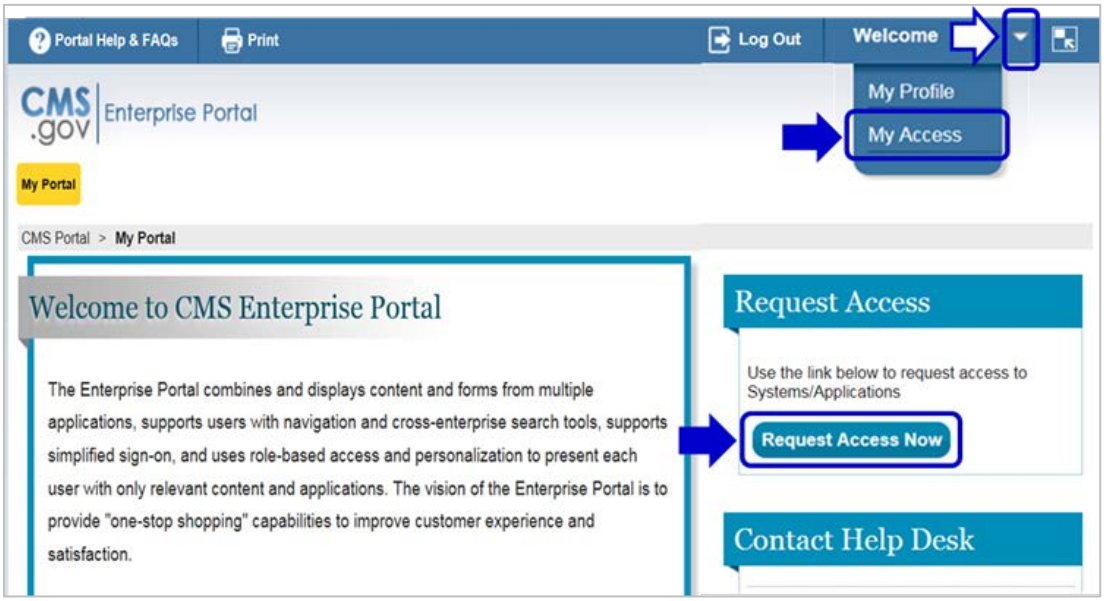
The following are the basic step-by-step instructions on how to cancel a pending role request.

Note

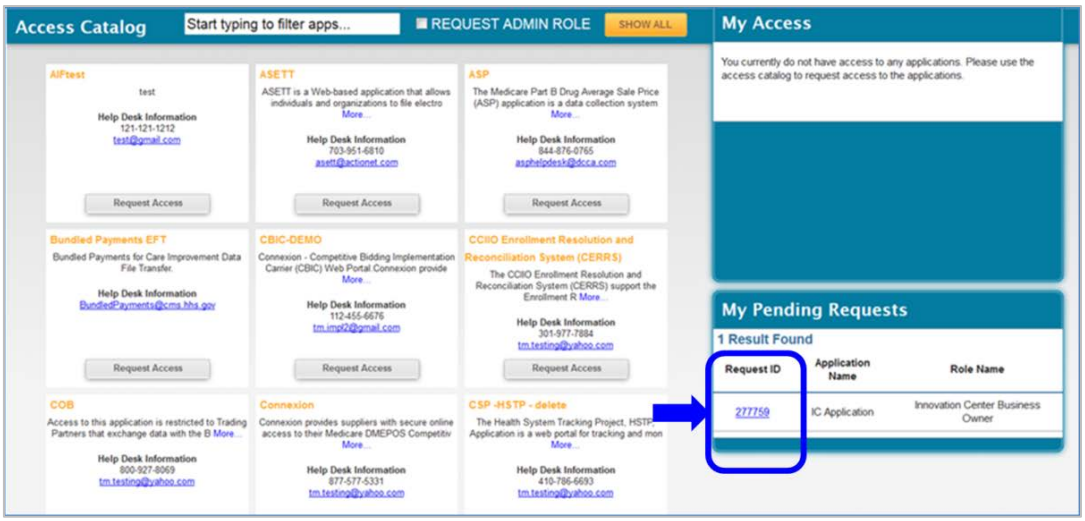
To cancel a pending role request for one of the applications listed below, please **BEGIN HERE**.

- ASETT
- ASP
- EPPE
- ESD
- FFM/Training– Agents/Brokers/Assisters
- IC
- IDHD
- MACPro
- MCU
- MLMS
- Open Payments
- SHIM
- T-MSIS
- zONE

To cancel a pending role request for all other applications, please **FOLLOW THESE STEPS**.

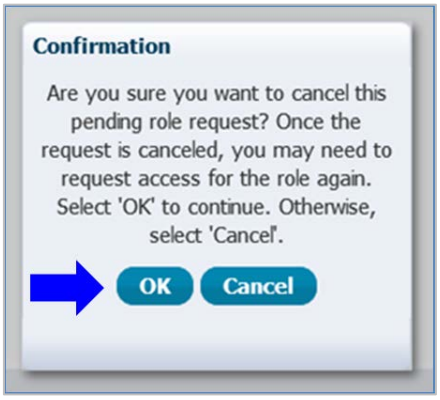
	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the **Terms and Conditions**, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue. Alternately, you may select **Request Access Now** to continue. 

	Action
Step 2	The application **Access Catalog** is displayed. In the **My Pending Requests** section of the Access catalog, select the **Request ID** link for the pending request.



Step 3	The **Pending Requests** panel is displayed on the **View and Manage My Access** page. In the **Cancel Request** column, select the **Cancel** link for the role request you wish to cancel.

Step 4	A pop-up confirmation is displayed. Select **OK** to submit the request.



	Action
Step 5	The pending role request is removed from the **Pending Requests** queue and a confirmation message is displayed.

Step 6	You will receive an E-mail notification that the role request has been cancelled.

Your request 277759 has been canceled.

You requested:
Application Name: IC Application
Role Name: IC_BO

If you did not initiate this action, please contact your Application Help Desk.

Thank you,
CMS.gov

Please do not reply to this system generated E-mail.

Note

An E-mail notification of the role request cancellation is sent to both the user and the approver of the application.

To cancel a role for one of the applications listed below:

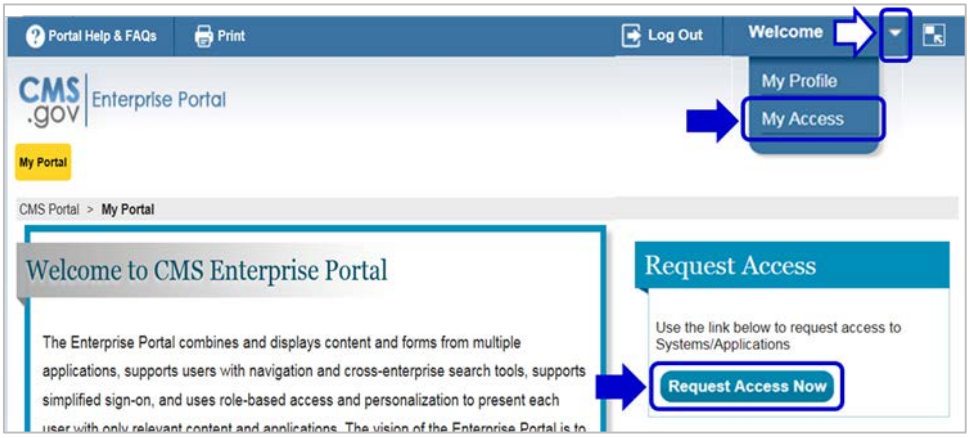
Applications	
• ASETT	• MACPro
• ASP	• MCU
• EPPE	• MLMS
• ESD	• Open Payments
• FFM/Training– Agents/Brokers/Assisters	• SHIM
• IC	• T-MSIS
• IDHD	• zONE

Please **FOLLOW THESE STEPS**:

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the **Terms and Conditions**, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue.

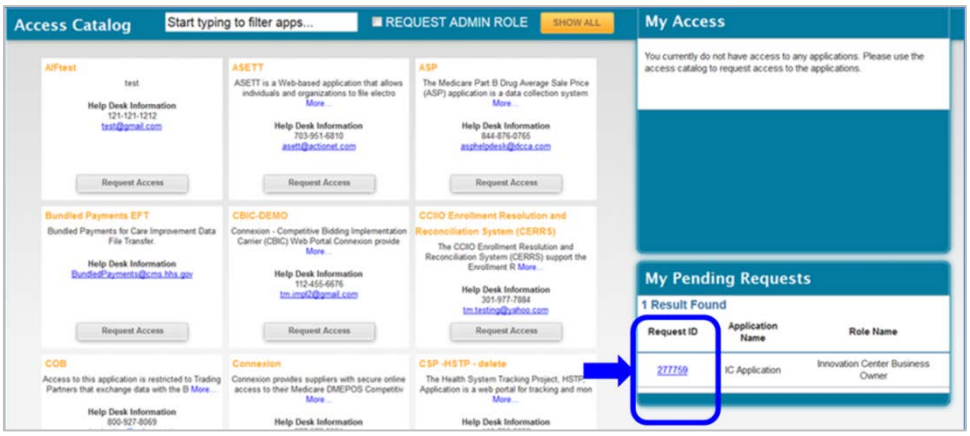
Action

Alternately, you may select **Request Access Now** to continue.



Step 2 The application **Access Catalog** is displayed.

In the **My Pending Requests** section of the Access catalog, select the **Request ID** link for the pending request.

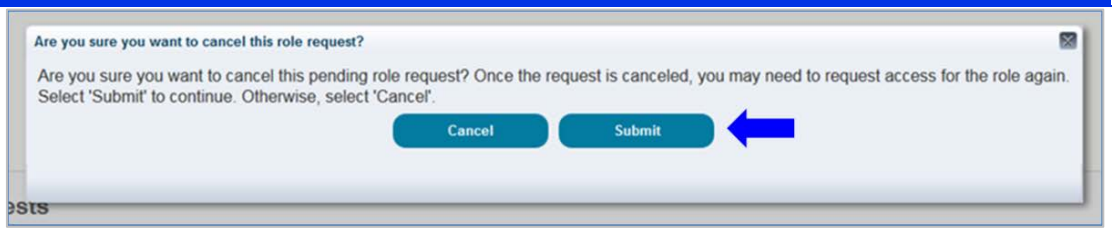


Step 3 The **Pending Requests** panel is displayed on the **My Access** page.

In the **Cancel Request** column, select the **Cancel** link for the role request you wish to cancel.

Step 4 A pop-up confirmation is displayed. Select **Submit** to submit the request.

Action



Step 5 The pending role request is removed from the **Pending Requests** queue and a confirmation message is displayed.

Step 6 You will receive an E-mail notification that the role request has been cancelled.

Your request 277759 has been canceled.

You requested:
Application Name: IC Application
Role Name: IC_BO

If you did not initiate this action, please contact your Application Help Desk.

Thank you,
CMS.gov

Please do not reply to this system generated E-mail.

Note

An E-mail notification of the role request cancellation is sent to both the user and the approver of the application.

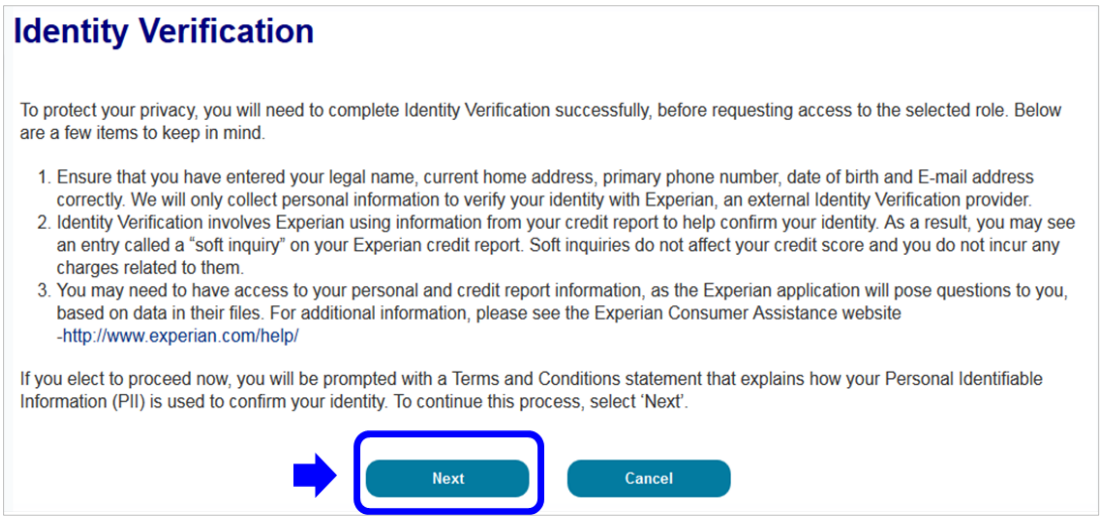
Identity Verification

Depending on the role and the information you provide, the system may take you to the Identity Verification page. The Identity Verification process, also known as Remote Identity Proofing (RIDP), is necessary for roles that require a higher level of security to access. Identity Verification is done by asking you questions based on your personal information.

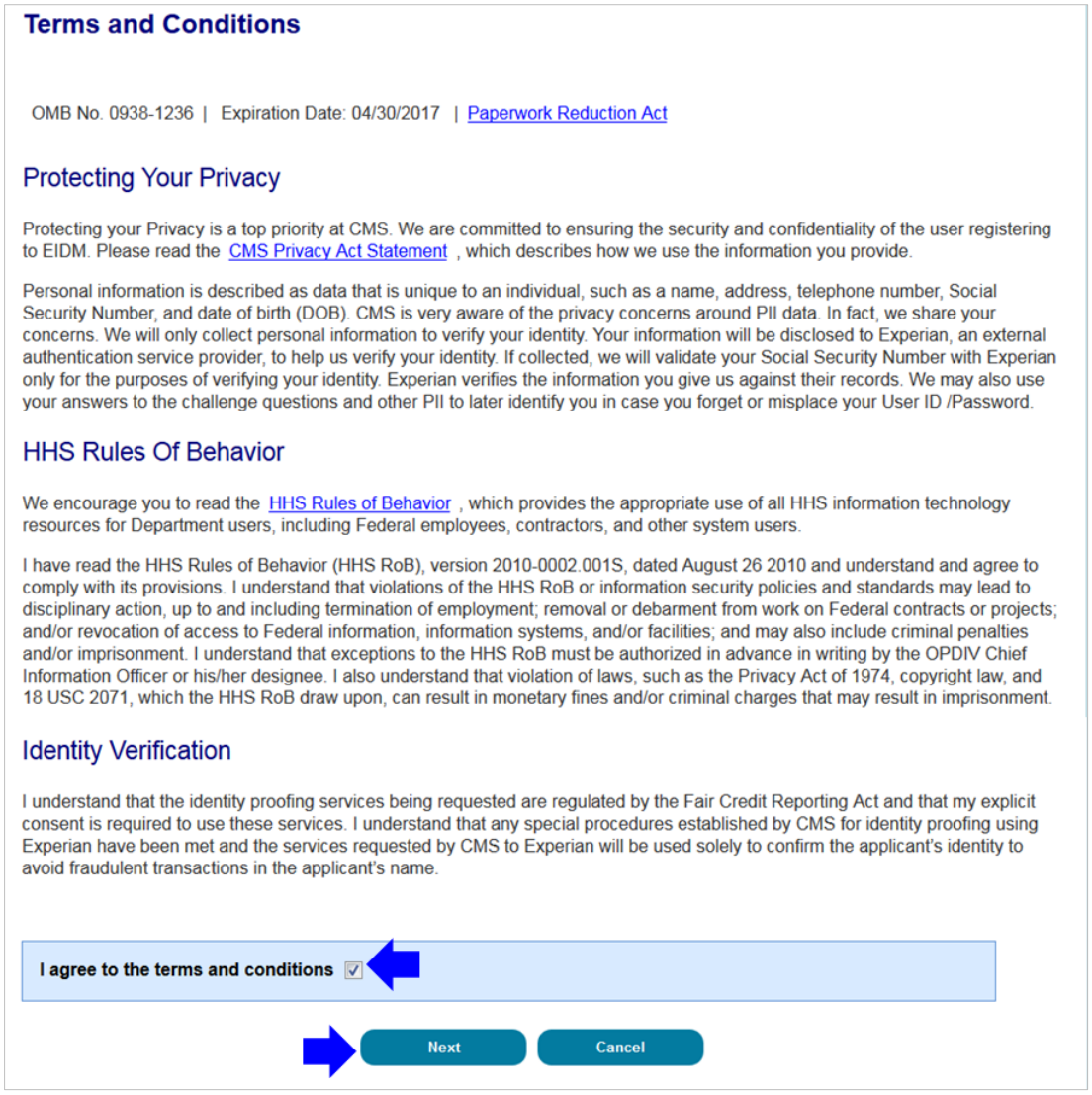
Note
CMS uses credit reporting agencies like Experian to verify identity information. This is only an inquiry and will not affect your credit score.

To begin the Identity Verification process, **FOLLOW THESE STEPS**:

	Action
Step 1	If you select a role that requires identity verification, you will first be directed to the **Identity Verification** page. Select **Next**, to begin the Identity Verification process.



	Action
Step 2	Read the important **Terms and Conditions** information on this screen and indicate your agreement by selecting the **I agree to the terms and conditions** checkbox. Select the **Next** button to continue.



Terms and Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | Paperwork Reduction Act

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the CMS Privacy Act Statement , which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security Number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

HHS Rules Of Behavior

We encourage you to read the HHS Rules of Behavior , which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

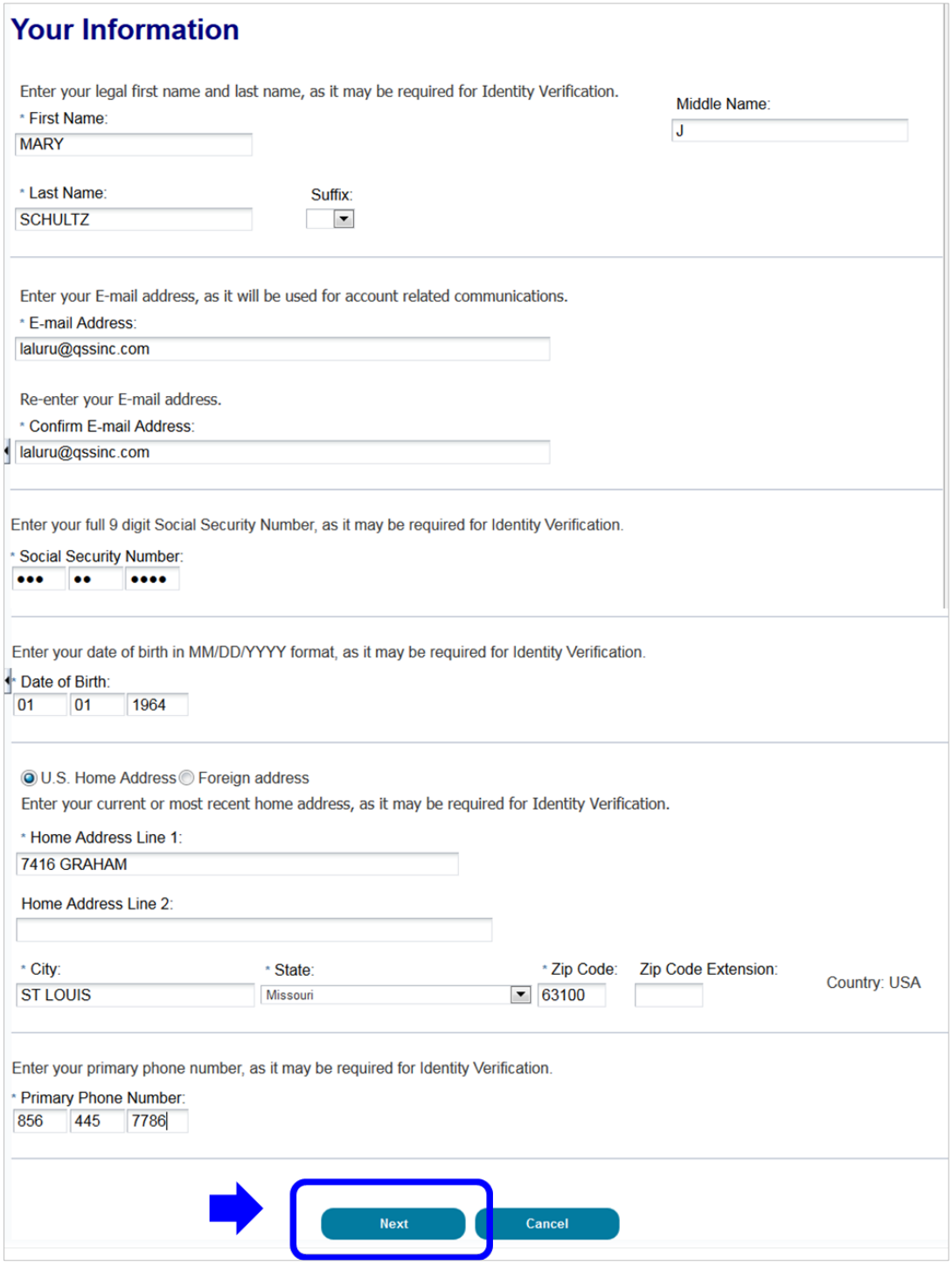
Identity Verification

I understand that the identity proofing services being requested are regulated by the Fair Credit Reporting Act and that my explicit consent is required to use these services. I understand that any special procedures established by CMS for identity proofing using Experian have been met and the services requested by CMS to Experian will be used solely to confirm the applicant's identity to avoid fraudulent transactions in the applicant's name.

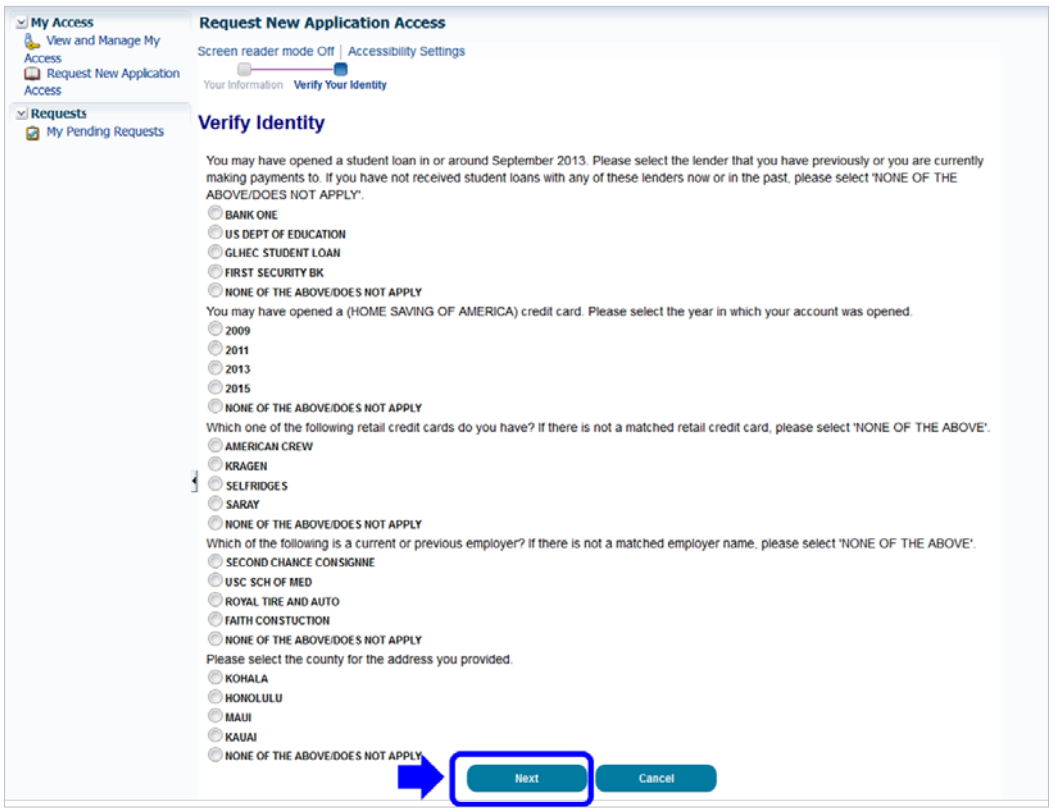
I agree to the terms and conditions ☑

Next Cancel

	Action
Step 3	Enter your information into the required fields of the **Your Information** page. Select **Next** to continue the Identity Verification process.

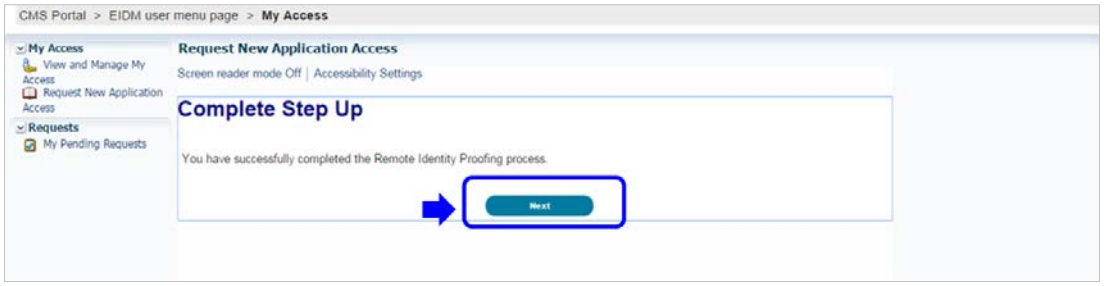


	Action
Step 4	Depending on the information you provided, the **Verify Identity** page may be displayed. You will be required to answer several questions about information that may be in your personal records. Please answer the questions to the best of your ability. Select the **Next** button to submit the request. If you wish to terminate the request, select **Cancel** to return to the **View and Manage My Access** page.



Step 5	After submitting the request, the Identity Verification confirmation will be displayed. Select the **Next** button to continue with the role request process.

Note
If the role auto-approves, the role is granted; log out and log back in to access it.

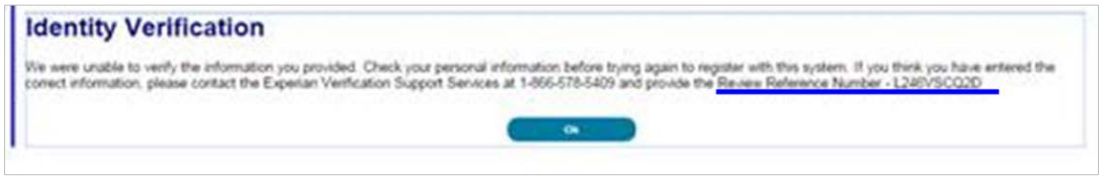


Identity Cannot be Verified

If you receive an error message that your identity cannot not be verified, it may simply mean that the information you provided could not be matched with the information available in the electronic records used for verification. You may need to take some additional steps to verify your identity.

Please follow the steps below.

	Action
Step 1	Check your personal information before trying again to register with the system.
Step 2	If you have entered the correct information and still cannot be verified, you will be instructed to call the Experian Help Desk and provide the **Review Reference Number** displayed on the screen so the help desk representative can help you verify your identity. Experian is the contractor CMS uses to complete the Identity Verification process.



Step 3	After you have contacted Experian login to CMS Enterprise Portal and proceed again through Role Request process (see How to Request a Role for the steps).
Step 4	On the **Your Information** screen, select the check box if you have contacted Experian and completed the identity verification process over the phone with the Experian Support personnel.

Note

Selecting this checkbox will instruct the system to retrieve your identity verification results from Experian based on the phone verification process. You do have the option of not selecting the checkbox and continuing as you did in your original attempt of Identity Verification, prior to contacting Experian.

Enter your information in the required fields.

Step 5	If your identity cannot not be verified by Experian, please contact your Application Help Desk for the next steps.

Note

Depending on the type of role you requested, you may not be granted the role you

Action
requested until you have successfully undergone ID proofing.

Multi-Factor Authentication (MFA) Registration

Multi-Factor Authentication (MFA) is a security mechanism that is implemented to provide an extra layer of security such as a security code, when logging in with your User ID and Password..

Registered CMS portal users who wish to access a CMS MFA protected application will be directed through the MFA registration process.

During the MFA registration process, the CMS EIDM system requires registration of a phone or computer to add an additional level of security to a user's account. The user is given five options from which to select, to complete the registration process:

- **Smart Phone**: Users can download VIP access software on their smart phone/tablet. The user must enter the alphanumeric Credential ID that is generated by the VIP access client. The user will then enter the Security Code generated by the VIP client.
- **Computer**: Users can download VIP access software on their computer. The user must enter the alphanumeric Credential ID generated by the VIP access client. The user will enter the Security Code generated by the VIP client.
- **Short Message Service (SMS)**: Users can use the SMS option to have their Security Code texted to their phone. The user must enter a valid phone number. The phone must be capable of receiving text messages. Carrier charges may apply.
- **Interactive Voice Response (IVR)**: The user can select the IVR option to receive a voice message containing their Security Code. The user must provide a valid phone number and (optional) phone extension.
- **E-mail**: Users can select the E-mail option to receive an E-mail containing the Security Code required at login. The E-mail address on the user's profile will be used.

Note
Delays in E-mail transmission, spam filters, and other issues outside the user' control can make this the least desirable option to receive a security code.

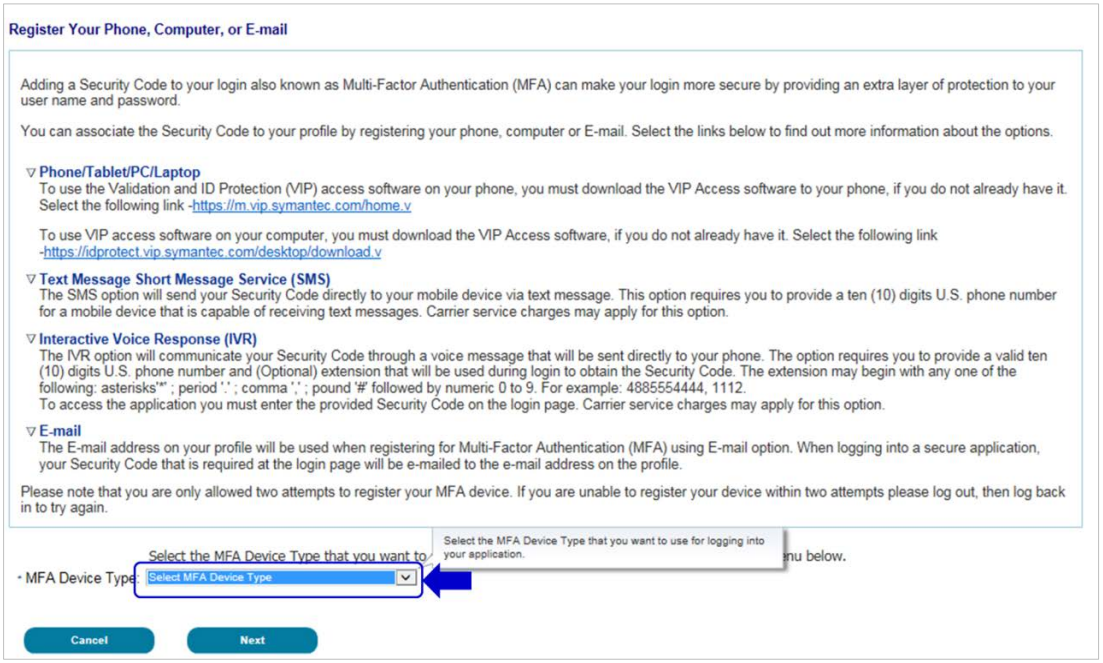
To gain access to a CMS MFA protected application, **FOLLOW THESE STEPS**:

	Action
Step 1	If you select a CMS MFA Protected application, you will first be directed to the **Multi-Factor Authentication Information** page. Select **Next**, to begin the MFA Registration process.
Step 2	To make your account more secure, you will be directed to the **Register Your Phone,**

Action

Computer, or E-Mail page.

Select the **MFA Device Type** you wish to register from the drop-down menu.



Notes

For VIP Client: Enter the Credential ID generated by the VIP Access client.

For Text: You will be asked to enter a valid phone number to receive your Security Code.

For Interactive Voice Response (IVR): Enter the phone number and (optional) extension that will be used during login to obtain the Security Code. The extension may begin with any one of the following: asterisks'*'; period '.'; comma ','; pound '#', followed by numeric 0 to 9. For example: 4885554444, 1112.

, (comma) Creates a short delay of approximately 2 seconds;

. (period) Creates a longer delay of approximately 5 seconds;

***(asterisks)** Used by some phone systems to access an extension;

 # (pound/hash) Used by some phone systems to access an extension; and

You may use a comma if you are not sure of the special character supported by your company's phone system.

For E-mail: The E-mail on your profile will be used to send the Security Code required at login.

<u>Using the VIP Client</u>

Follow these steps to use the VIP Access Client:

1. Depending on the registration option you select, download the VIP Access

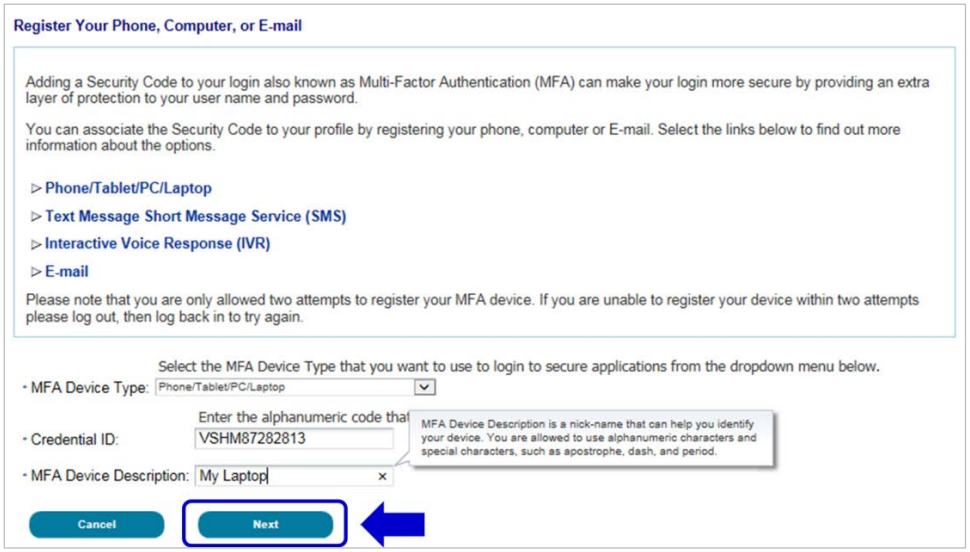
Action

software from the URL provided on the **Register Your Phone or Computer** page.

2. Once downloaded, select the **VIP Access Icon** on your desktop to activate the **VIP Access** window.
3. Select the Icon next to the **Credential ID** to copy the alphanumeric code.

4. Place your curser on the **Credential ID** field of the **Register Phone or Computer** page and right click to insert the **Credential ID**.

Step 3 Enter the credentials of the device (VIP Client shown) and a short description in of the device in the **MFA Device Description** field. Then select **Next** to submit your registration.

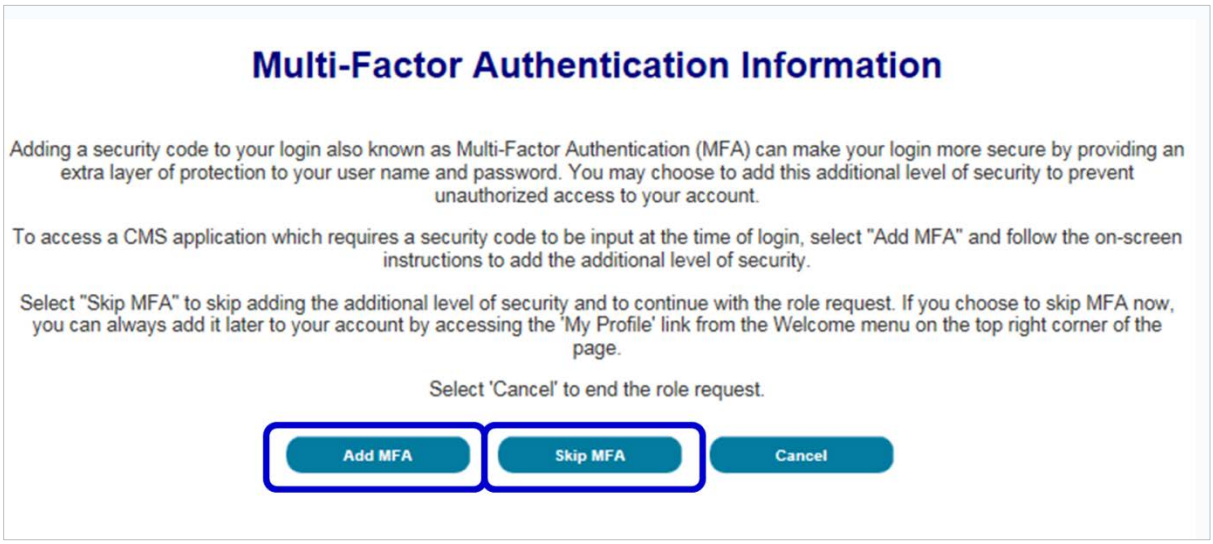


Step 4 After submitting the registration, a message will be displayed that you have successfully registered your device. Select **Next** to continue the role request process.

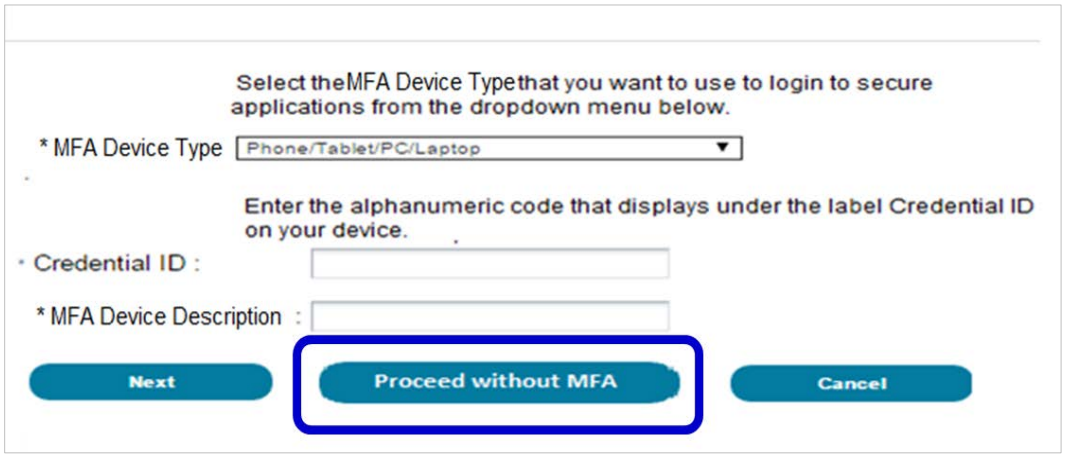
Optional Multi-Factor Authentication (MFA)

Some roles have a reduced level of security requirements and offer MFA as an option to add to their profile.

A user who selects a role that offers MFA as an option will be directed to the Multi-Factor Authentication Information Page. The user can select **Add MFA**, to begin the MFA process described in the **Multi-Factor Authentication (MFA) Registration** section, or **Skip MFA**, to skip MFA authentication altogether.

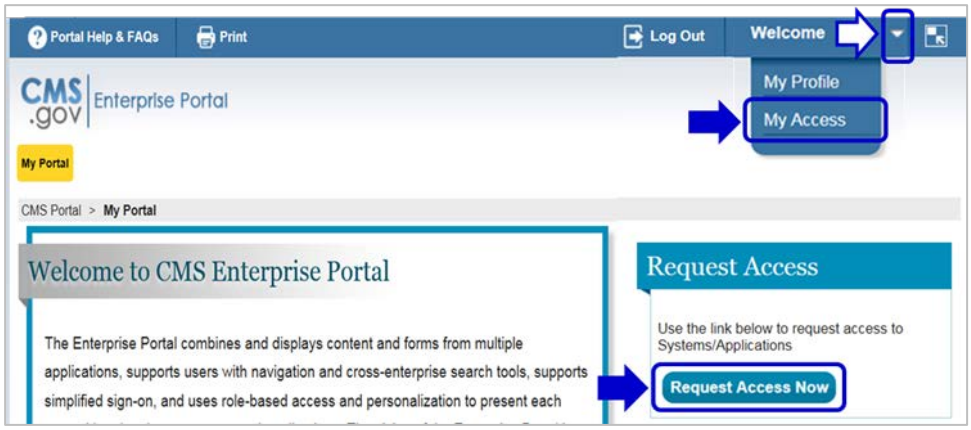
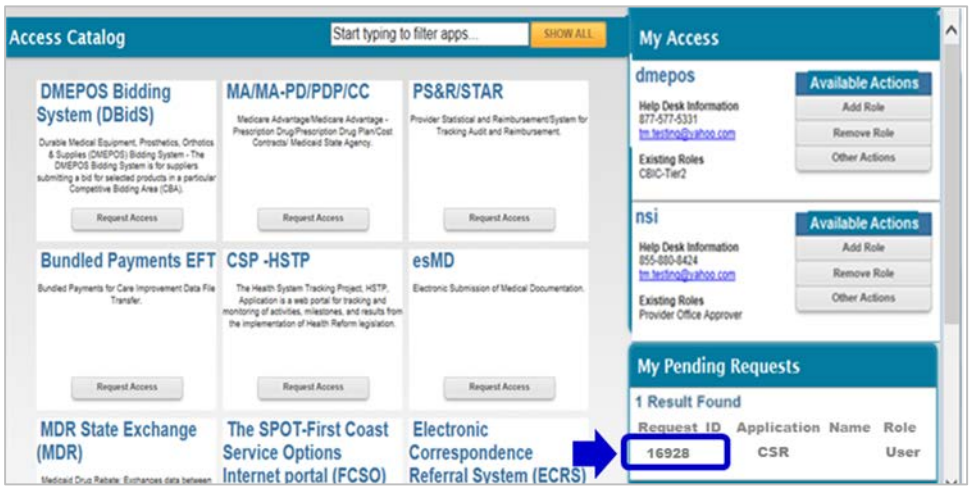


While registering an MFA device, if a user wishes to continue without MFA, he can select **Proceed without MFA**. The user will be directed to the next step of the role request process.



How to Check the Status of a Pending Request

The following are the basic step-by-step instructions on how to use the **My Pending Requests** feature to check the status of a pending request.

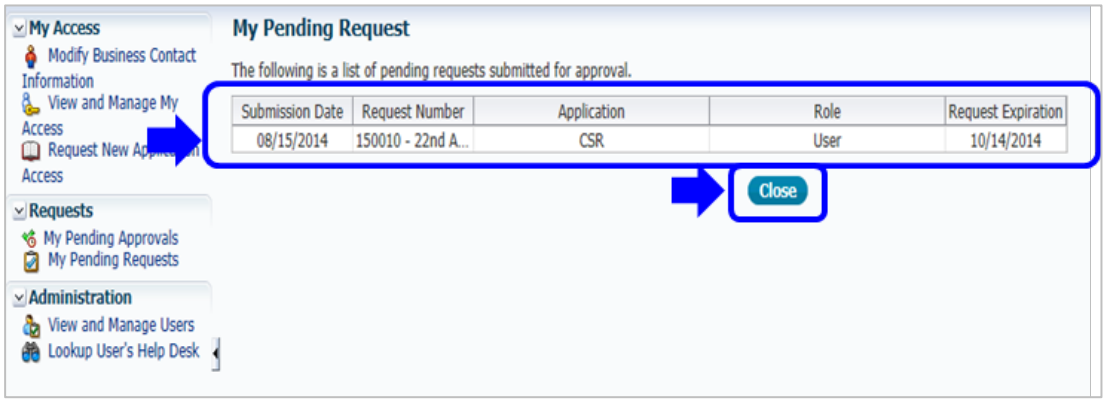
	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the **Terms and Conditions**, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue. Alternately, you may select **Request Access Now** to continue. 
Step 2	The **Access Catalog**, **My Access** and **My Pending Requests** sections are displayed. Scroll down to **My Pending Requests**. All of your pending requests are displayed in the **My Pending Requests** section. Select the Request ID number of a pending request to view the details. In the example below, we will select pending Request ID number 16928. 

	Action
Step 3	After selecting the Request ID number**,** additional information is displayed about the pending request.

Note

You will not be able to open or view a pending request. You will receive an E-mail when a pending request has been approved, rejected or has expired.

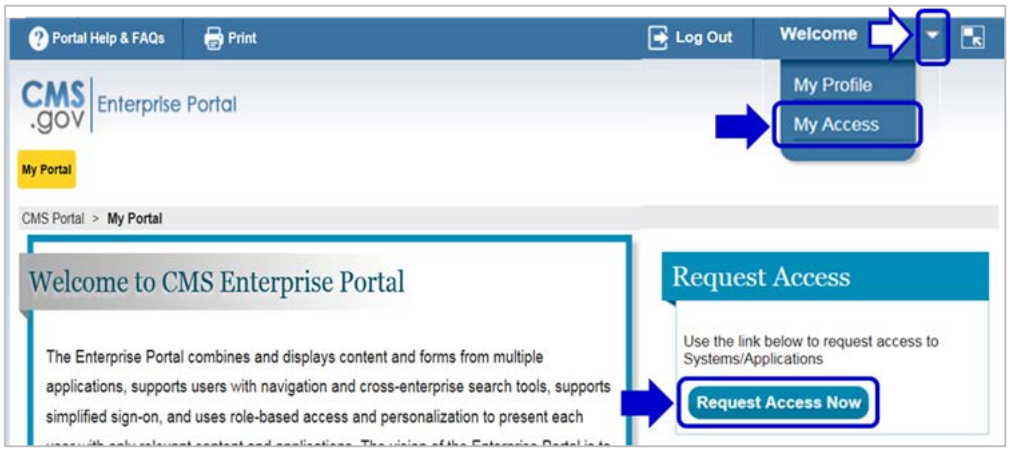
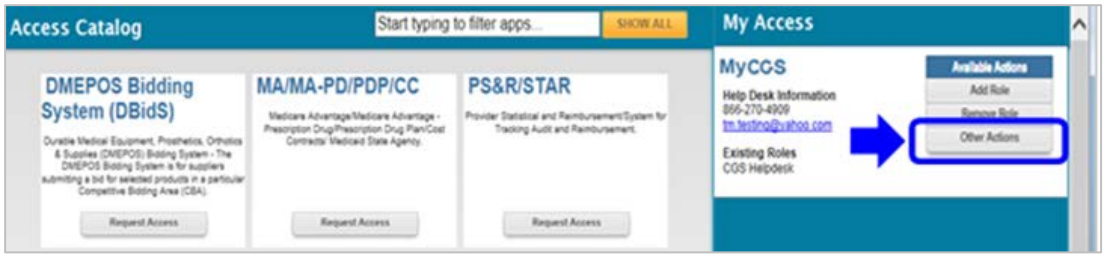
Select **Close** to close the My Pending Request information.



How to View and Change Your Access

How to View/Modify Your Business Contact Information

The following are the basic step-by-step instructions on how to use the **Modify Business Contact Information** feature to modify your business contact information.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the **Terms and Conditions**, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue. Alternately, you may select **Request Access Now** to continue. 
Step 2	The **Access Catalog**, **My Access** and **My Pending Requests** sections are displayed. Select **Other Actions** in the **My Access** section to continue. If there are multiple **Other Actions** options displayed, you may select <u>any</u> "Other Actions" option to continue. **Note** If you currently do not have access to at least one application, the **Available Actions** in the **My Access** section will not be displayed. You will not be able to modify your business contact information until you have been approved for access to at least one application. In the example below, we will select **Other Actions** for the MyCGS application. 

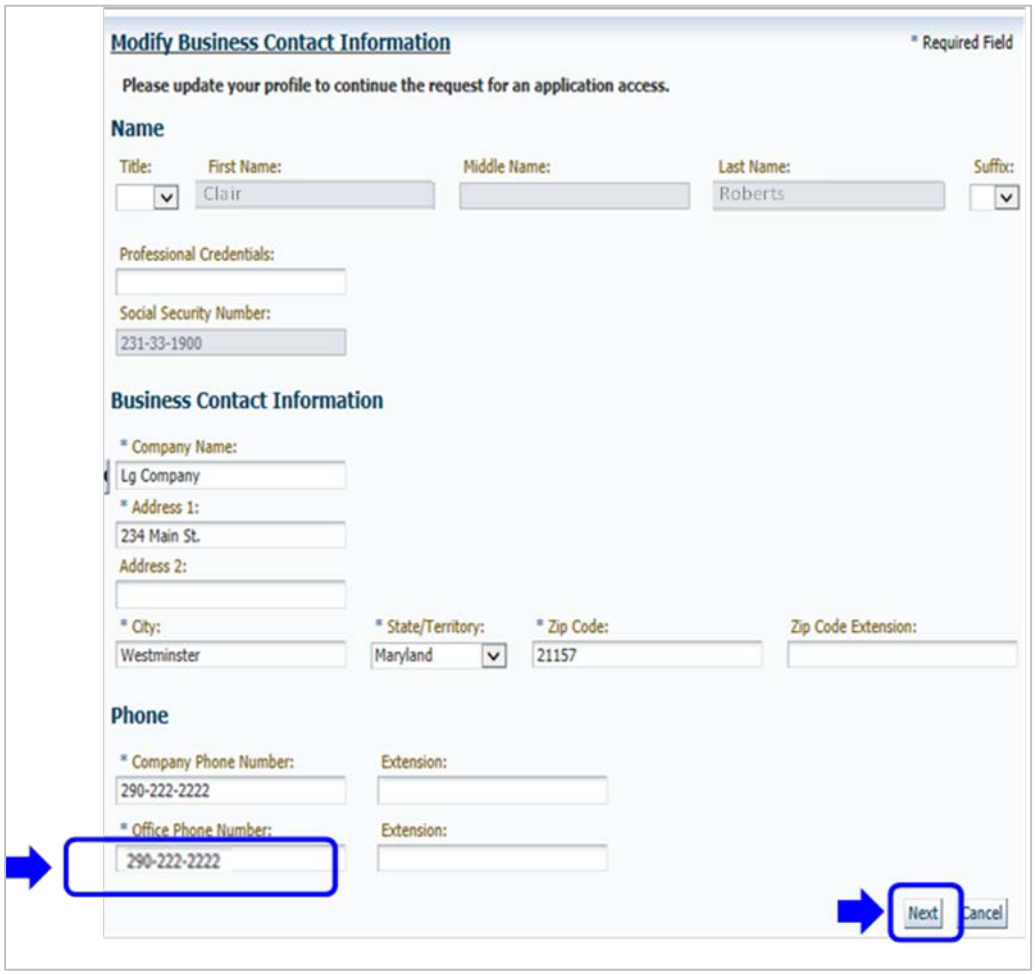
	Action
Step 3	After selecting **Other Actions**, the **View and Manage My Access** page is displayed. Select Modify Business Contact Information.

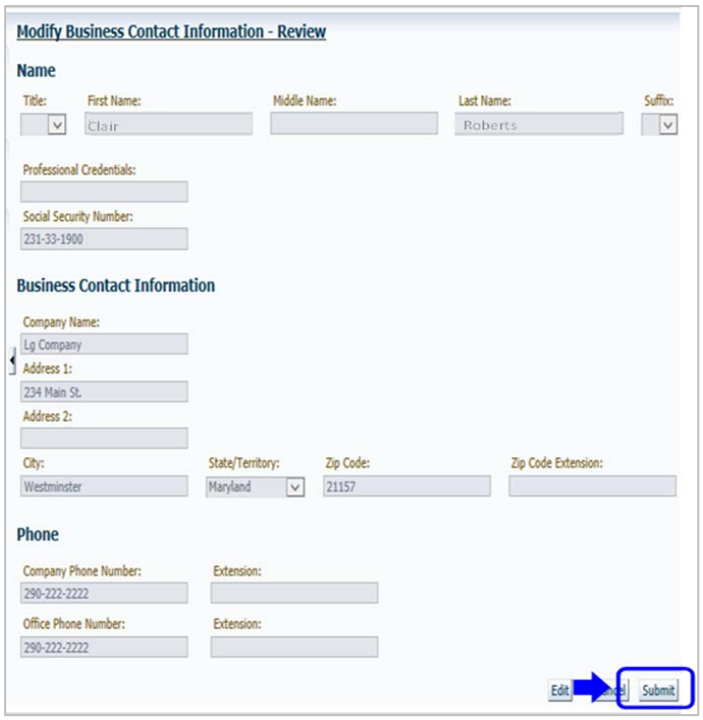
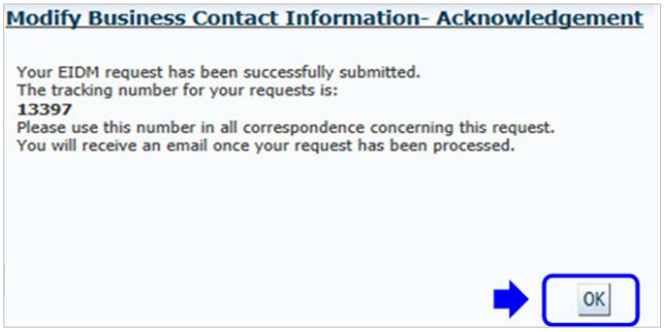
Step 4	The **Modify Business Contact Information** page is displayed. The fields in gray on the **Modify Business Contact Information** page cannot be changed or deleted. Modify or enter the appropriate information on the **Modify Business Contact Information** page to update your business contact information. Select **Next** to complete the **Modify Business Contact Information** process.

Note

You may select Cancel at any time to exit out of the Modify Business Contact Information process. New information or changes entered will not be saved.

In the example below, we will add the Office Phone Number.

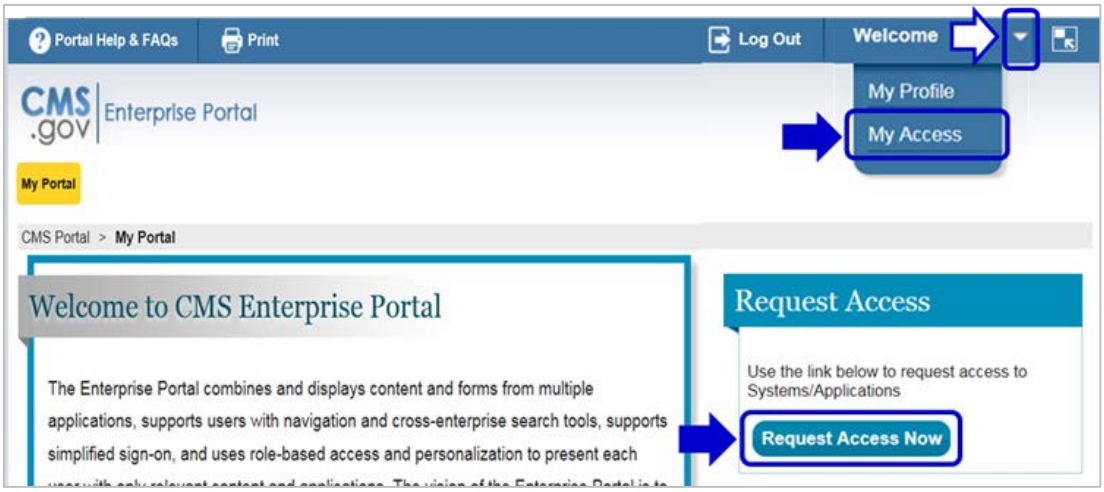


	Action
Step 5	The **Modify Business Contact Information - Review** page is displayed. Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval. **Note** You may select **Cancel** to exit out of the Modify Business Contact Information process. New information or changes entered will not be saved. In the example below, the information is correct and we will select **Submit** to submit the request. 
Step 6	After selecting Submit, the **Modify Business Contact Information – Acknowledgement** page is displayed. The acknowledgement page displays the tracking number, for future correspondence, and informs you that you will receive an E-mail when the request has been processed. Select **OK** to close the acknowledgement page. 

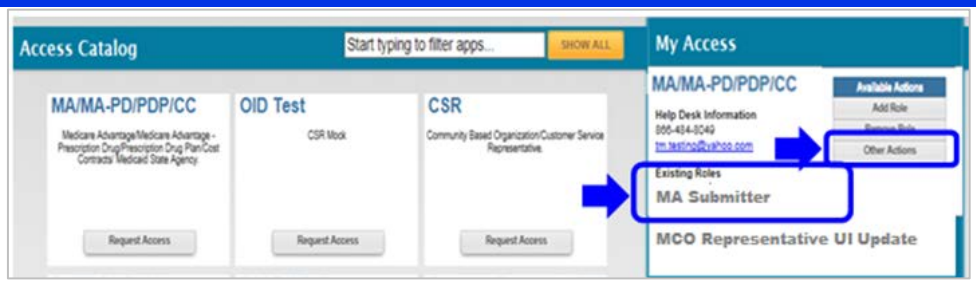
How to View/Modify Your Existing Role Information

The following are the basic step-by-step instructions on how to use the **View/Modify a Role** feature to view/modify your existing role information and add/remove a role attribute, if your application allows you to add/remove an attribute.

- When you registered for a role, you may have also registered for additional features, reports, or other details needed for your role. These are called role "attributes".To view role information: follow Steps 1-5.
- To add an Attribute to your role: continue with Steps 6-8.
- To remove an Attribute from your role: continue with Steps 9-13.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the **Terms and Conditions**, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue. Alternately, you may select **Request Access Now** to continue. 
Step 2	The **Access Catalog**, **My Access**, and **My Pending Requests** sections are displayed. Any existing roles you have are displayed in the **My Access** section. Select **Other Actions** in the **My Access** section to continue. If there are multiple **Other Actions** options displayed, you may select <u>any</u> "Other Actions" option to continue. In the example below, we will select **Other Actions** to modify and add a role attribute in the MA/MA-PD/PDP/CC application.

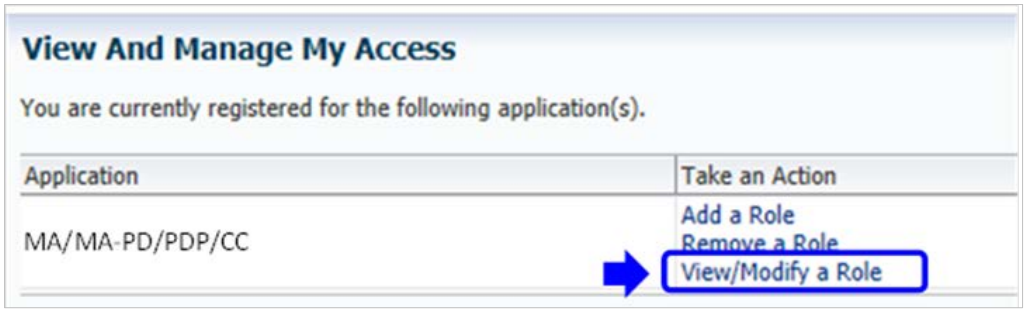
Action



Step 3 The View and Manage My Access page is displayed.

Select **View/Modify a Role** to continue. If there are multiple applications displayed, select **View/Modify a Role** for the application you want to view.

In the example below, we will select **View/Modify a Role** to add a role attribute in the MA/MA-PD/PDP/CC application.

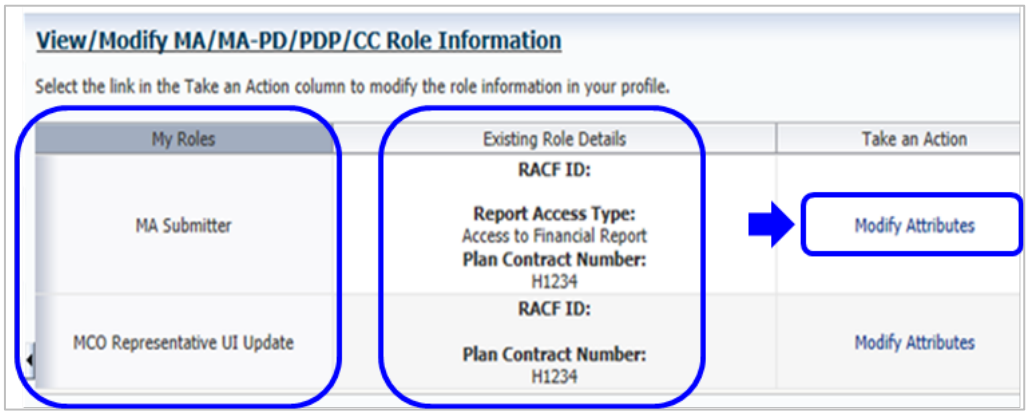


Step 4 The **View/Modify Role Information** page is displayed.

All of your roles are displayed in the **My Roles** section. All of your existing role information is displayed in the **Existing Role Details** section.

Select **Modify Attributes** to continue. If there are multiple roles displayed, select **Modify Attributes** for the role you want to add a role attribute to.

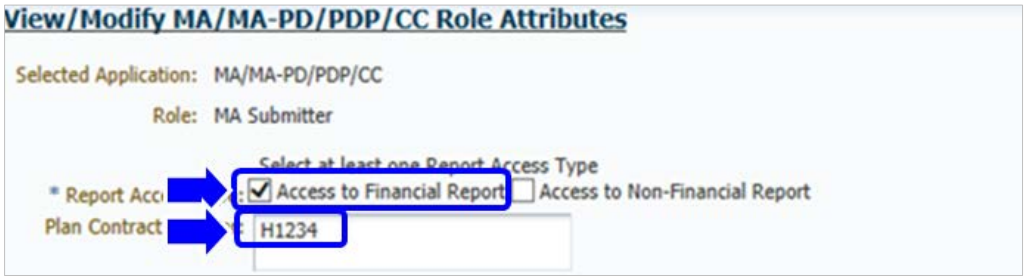
In the example below, we will select **Modify Attributes** for the MA Submitter role to add a role attribute to.



Step 5 After selecting **Modify Attributes**, the **View/Modify Role Attributes** page is displayed.

Action

All of your existing role details are also displayed.



Roles without attributes can select **Cancel** to close the page.

How to Add an "Attribute" to Your Role

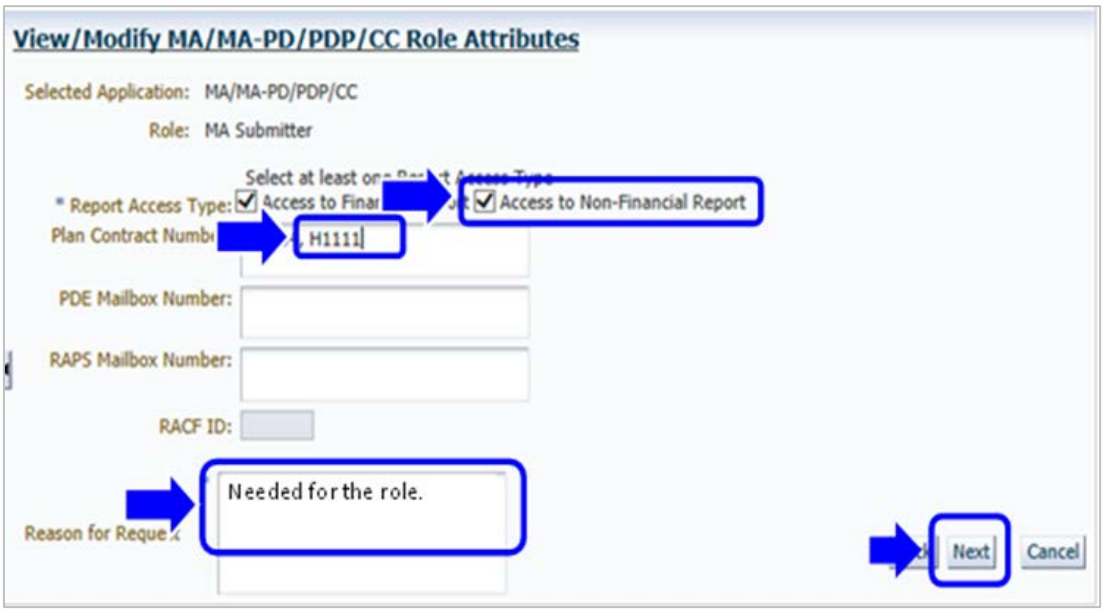
To add an Attribute to your role: continue with Steps 6-8.

Step 6 Provide the additional attributes needed for your role and enter the reason for the request in the **Reason for Request** box.

Select **Next** to complete the **Add a Role Attribute** process.

> **Note**
>
> You may select **Cancel** at any time to exit out of the Add a Role Attribute process. New information or changes entered will not be saved.

In the example below, we will add the **Access to Non-Financial Report** and **Plan Contract Number** H1111, enter the reason for the request in the **Reason for Request** box, and select **Next** to continue.



Action	
Step 7	After selecting **Next**, the **View/Modify Role Attributes - Review** page is displayed. Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval. **Note** You may select **Cancel** to exit out of the Add a Role Attribute process. New information or changes entered will not be saved. In the example below, the information is correct. We will select **Submit** to submit the request.
Step 8	After selecting Submit, the **View/Modify Role Attributes - Acknowledgement** page is displayed. The acknowledgement page displays the tracking number for the request, the role, and the role attributes to be added. Select **OK** to close the acknowledgment page.

Action

How to Remove an "Attribute" from Your Role

To Remove an Attribute from your role: continue with Steps 9-13.

	Action
Step 9	The **View/Modify Role Information** page is displayed.

All of your roles are displayed in the **My Roles** section. All of your existing role details are displayed in the **Existing Role Details** section.

Select **Modify Attributes** to continue. If there are multiple roles displayed, select **Modify Attributes** for the role you want to modify and remove a role attribute.

Note
You may select **Cancel** at any time to exit out of the Remove a Role Attribute process. New information or changes entered will not be saved.

In the example below, we will select **Modify Attributes** for the MA Submitter role. There is an arrow pointing to the **Modify Attributes** link.

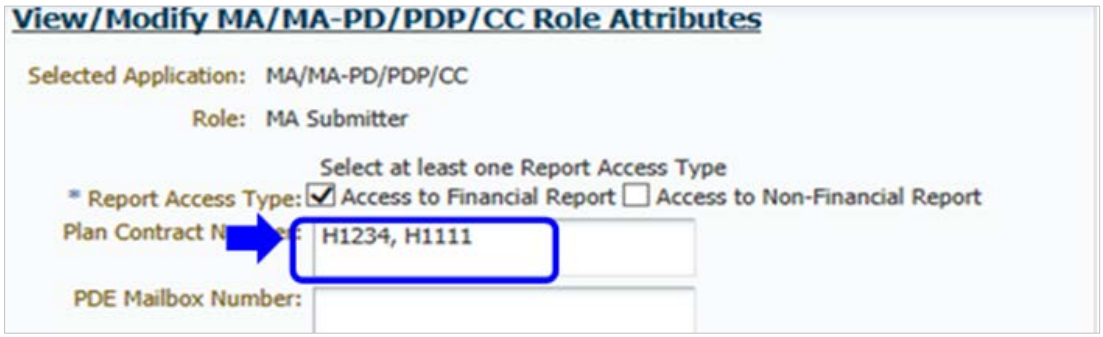
Step 10	After selecting **Modify Attributes**, the **View/Modify Role Attributes** page is displayed.

All of your existing role details are also displayed.

Action

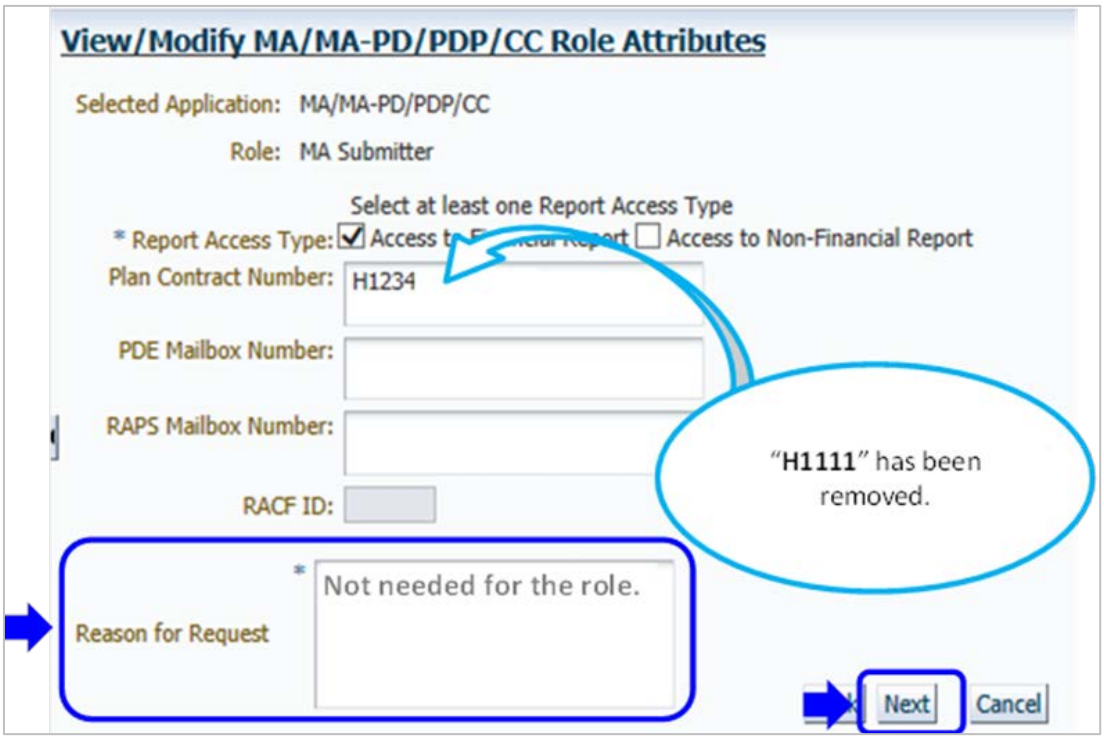
Note

Because this screen shows the existing role details, it is imperative that users not remove any of the existing details if access is still needed. Any information deleted from this screen will result in a loss of access to the deleted attribute. For this reason, users who wish to add new access should add the additional information while keeping the original details intact.



Step 11 Remove the attribute or attributes you are required to remove, enter the reason for the request in the **Reason for Request** box, and then select **Next** to continue.

In the example below, we will remove **Plan Contract Number** H1111, enter the reason for the request in the **Reason for Request** box, and select **Next** to continue.



Step 12 After selecting **Next**, the **View/Modify Role Attributes - Review** page is displayed.

Review the information displayed. Select **Edit** to modify the information.

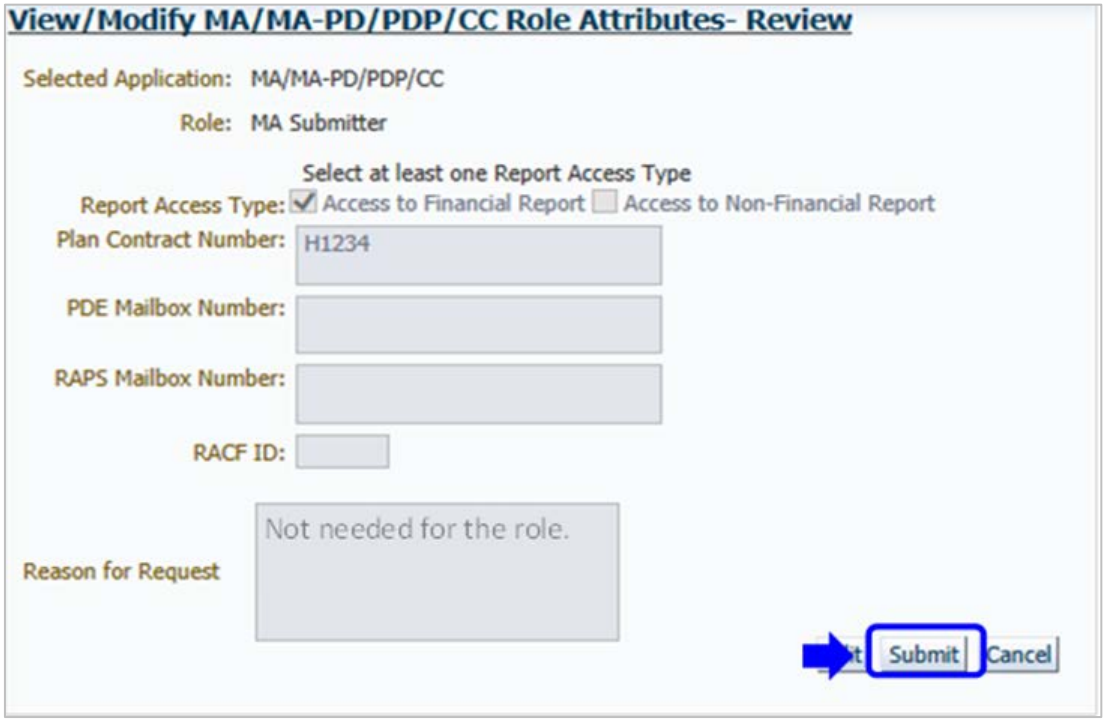
Select **Submit** to submit the request for approval.

Action

Note

You may select **Cancel** to exit out of the Remove a Role Attribute process. New information or changes entered will not be saved.

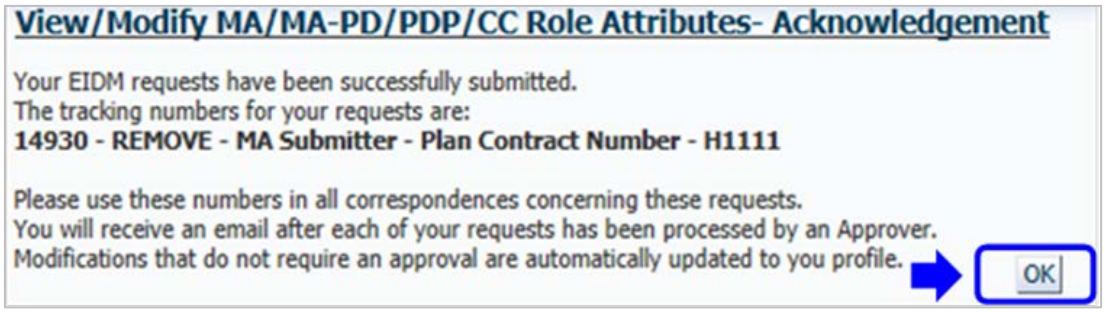
In the example below, the information is correct. We will select **Submit** to submit the request.



Step 13 After selecting Submit, the **View/Modify Role Attributes - Acknowledgement** page is displayed.

The acknowledgement page displays the tracking number for the request, the role, and the role attributes to be removed.

Select **OK** to close the acknowledgement page.



How to Replace an Existing Role with Another Role

The following is a quick overview on how to replace an existing role in an application with another role.

When you have an existing role *(such as an end user role, back-up security official, back-up authorized official, back-up approver, etc.)* and you need to replace your role with another role, for example, a higher-level role, you will have to:

1. ***Remove your existing role first***, and replace it with another role.
2. Submit a request for access for the new role.

To remove an existing role, follow the step-by-step instructions on How to Remove a Role below.

To request access for a new role, or another role, follow the How to Request a Role.

How to Remove a Role

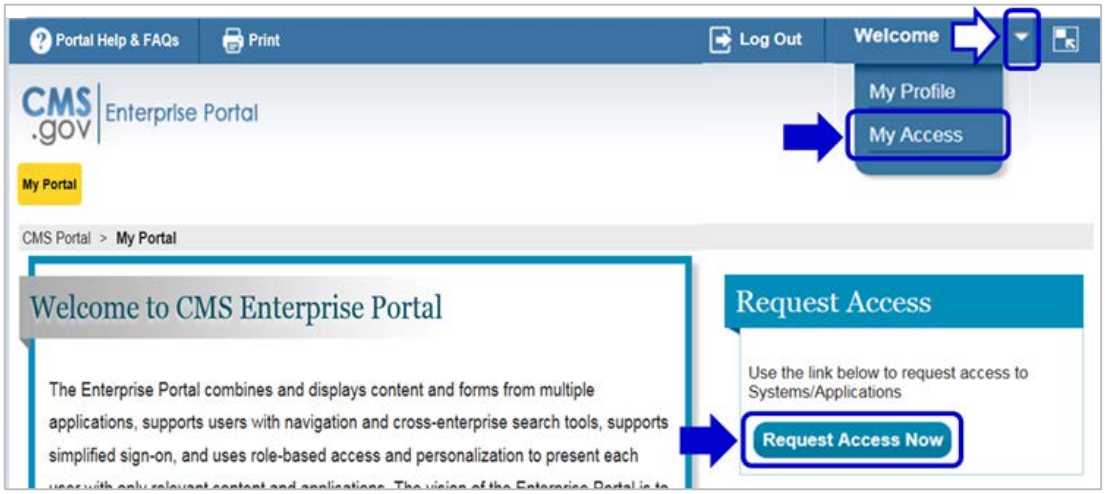
The following are the basic step-by-step instructions on how to use the **Remove Role** feature to remove a role, when you are required to remove a role, and your application allows you to remove a role.

Note:

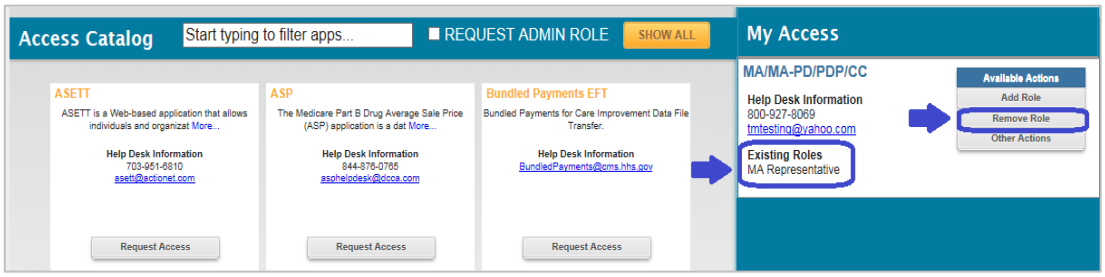
If you are a DMEPOS Authorized Official and you have no people in your organization, you may use the Remove a Role feature to remove your role from the organization. Since you have no persons in your organization, your organization will also be removed when EIDM completes the remove a role process.

However, if you have persons that have been approved to access your DMEPOS organization, or you have pending requests for access for your organization, you will not be able to remove your Authorized Official role. The reason: The persons in your organization, or applying for access, must have an Authorized Official in the organization.

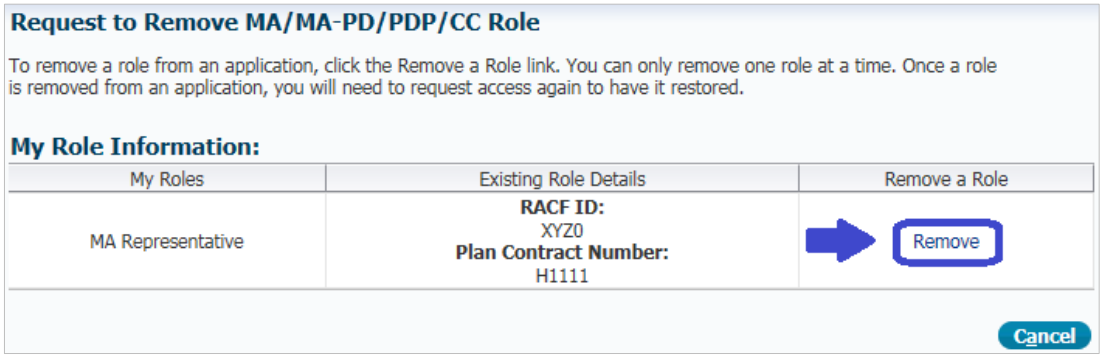
To remove a DMEPOS Authorized Official role or any other role, please **FOLLOW THESE STEPS**:

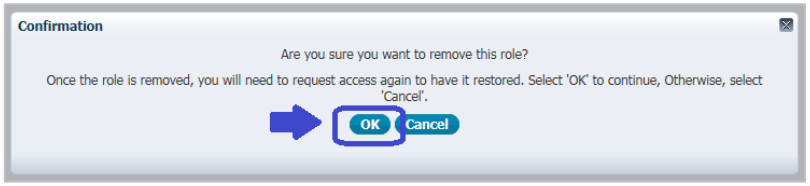
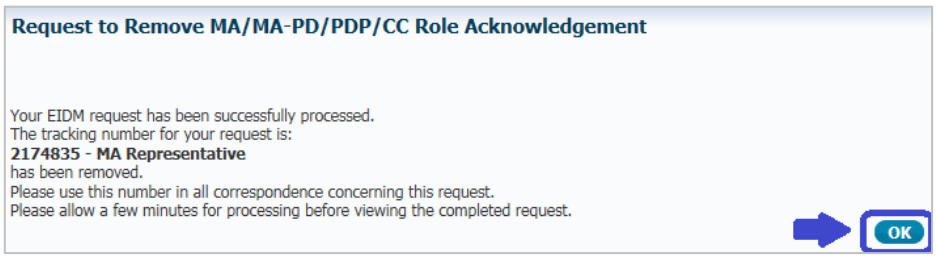
	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the **Terms and Conditions**, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue. Alternately, you may select **Request Access Now** to continue. 

	Action
Step 2	The **Access Catalog**, **My Access**, and **My Pending Requests** sections are displayed. Any existing roles you have are displayed in the **My Access** section. Select **Remove Role** for the application for which you are required to remove a role. In the example below, we will select **Remove Role** to modify and remove a role in the PS&R/STAR application.



Step 3	The **Request to Remove Role** page is displayed. All of your roles in the application are displayed in the **My Roles** section. All of your existing role details are displayed in the **Existing Role Details** section. Select **Remove** for the role (backup security official, authorized official, service rep, end user, etc.) you wish to remove. In the example below, we will select **Remove** to remove the PS&R Backup Security Official role.



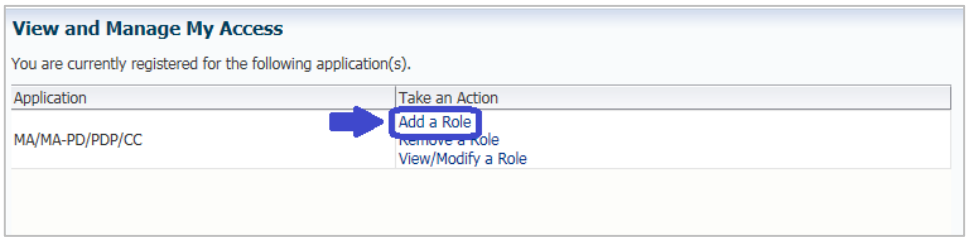
	Action
Step 4	A confirmation message is displayed. The confirmation message asks "Are you sure you want to remove this role?" Review the confirmation message. Select **OK** to continue to remove the role. Select **Cancel** to stop the removal of the role. **Warning**: When you select **OK**, the role will be removed at that time. You will not be able to "undo" the removal. In the example below, we want to remove the role, so we will select **OK**. 
Step 5	The **Request to Remove Role Acknowledgement** page is displayed. The acknowledgement page displays the tracking number, for future correspondence, the role, and the role attribute or attributes that were removed. Select **OK** to close the acknowledgement page.  **Note** To request access to a new role, or another role, follow the Step-by-Step instructions on how to request access to an application and a role. Please allow a few minutes for processing the submitted request before requesting access to another role.

How to Add a Role

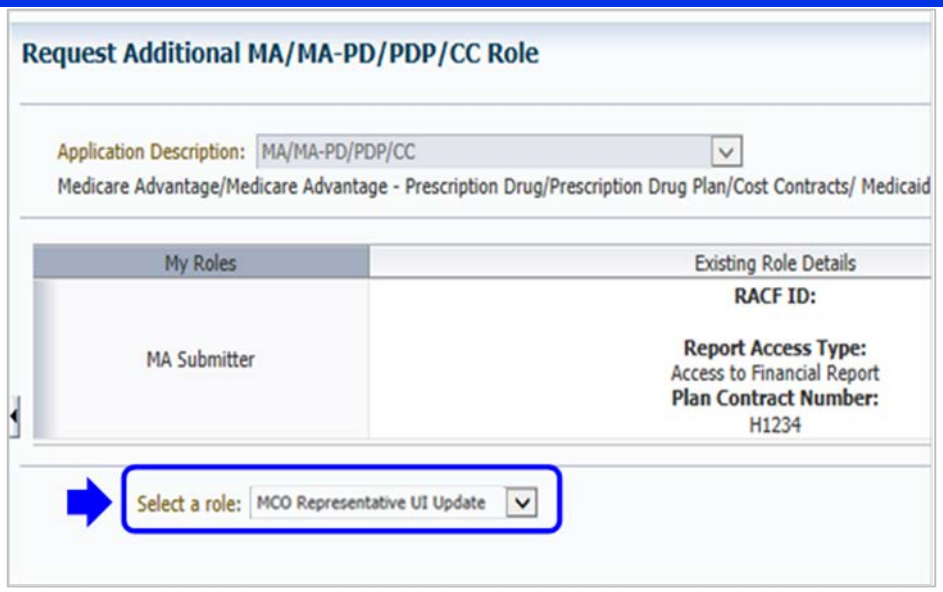
When you currently have a role in an application, and you are required to add another role in the same application, follow the step-by-step instructions below.

Note:
If you currently do not have a role in the application, you have removed your role in the application, or your role has been removed, you will need to request a role. Please see How to Request a Role.

The following are the basic step-by-step instructions on how to use the **Add a Role** feature to add a role, when you already have a role in your application and your application allows you to add an additional role.

	Action
Step 1	After navigating to the **View and Manage My Access** page, select **Add a Role** for the application you are required to add a role. In the example below, we will select **Add a Role** to add a role in the MA/MA-PD/PDP/CC application. 
Step 2	The **Request Additional Role** page is displayed. All of your roles in the application are displayed in the **My Roles** section. All of your existing role details are displayed in the **Existing Role Details** section. Select a role (security official, backup security official, authorized official, service rep, end user, etc.) from the **Select a role** drop-down menu. In the example below, we will select the MCO Representative UI Update role.

Action



Step 3 The **Request Additional Role** page is displayed.

Provide the additional details needed for the role you are requesting, enter the reason for the request in the **Reason for Request** box.

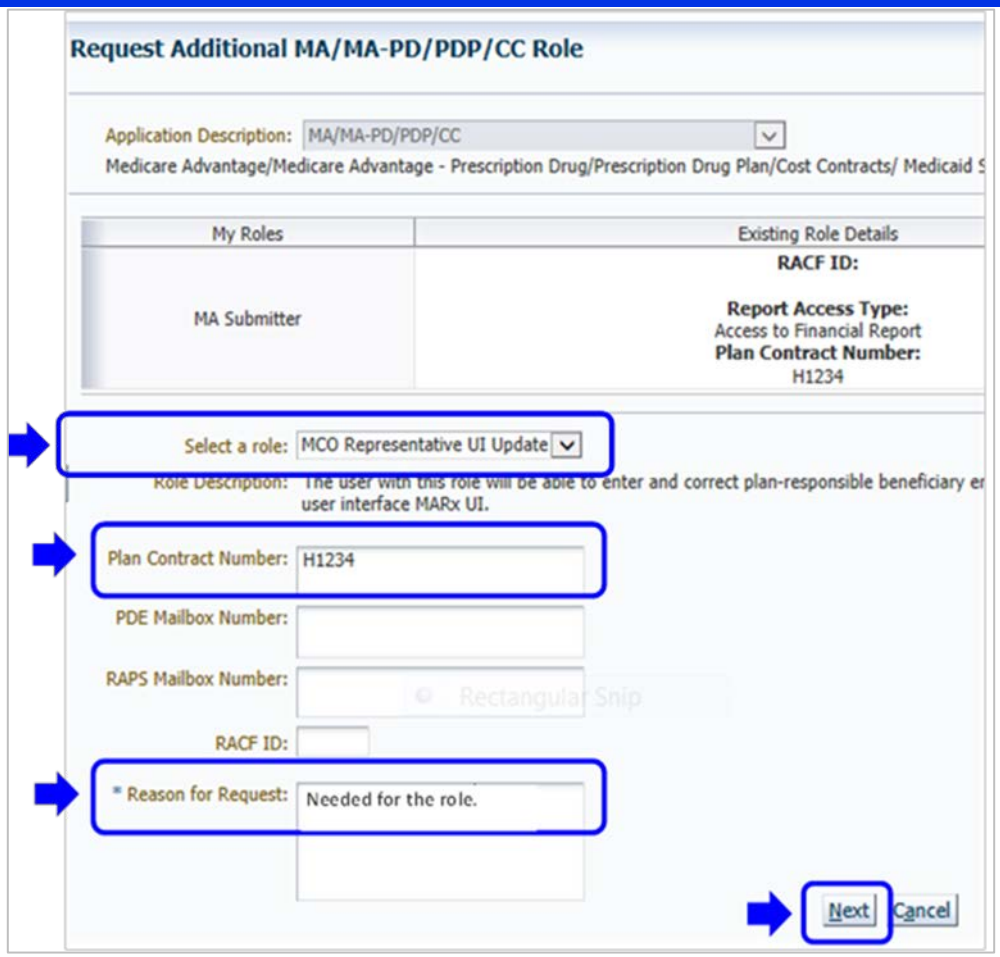
Select **Next** to continue.

Note

You may select **Cancel** at any time to exit out of the Add a Role process. New information or changes entered will not be saved.

In the example below, we will add **Plan Contract Number** H1234, enter the reason for the request in the **Reason for Request** box, and select **Next** to continue.

Action



Step 4 After selecting **Next**, the **Request Additional Role Review** page is displayed.

Review the information displayed. Select **Edit** to modify the information.

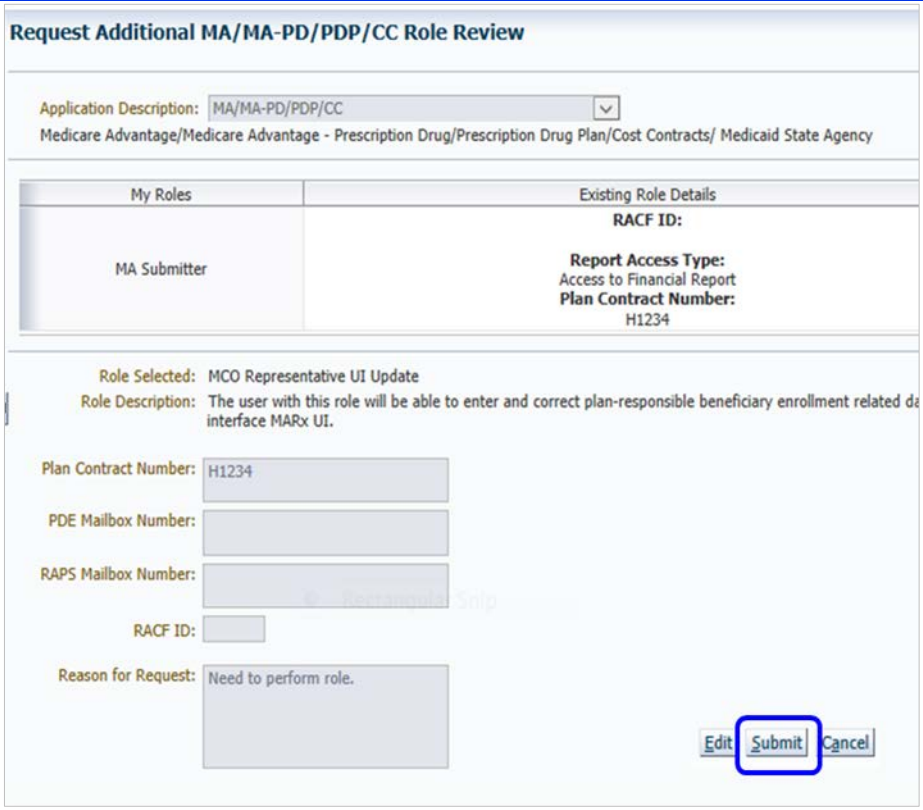
Select **Submit** to submit the request for approval.

Note

You may select **Cancel** to exit out of the Add a Role process. New information or changes entered will not be saved.

In the example below, the information is correct. We will select **Submit** to submit the request.

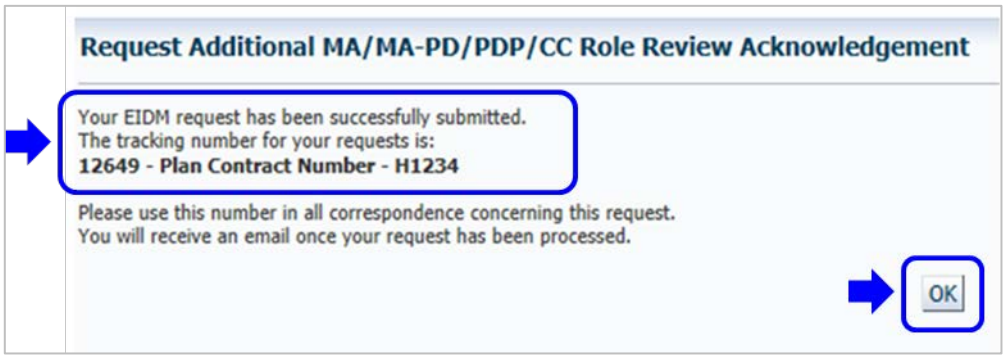
Action



Step 5 After selecting Submit, the **Request Additional Role Review Acknowledgement** page is displayed.

The acknowledgement page displays the tracking number for the request and the role attributes requested.

Select **OK** to close the acknowledgement page.



How to Unlock Your Account

For security purposes, the system will lock your account because of any of the following circumstances:

- The user has failed three consecutive login attempts.
- The user has failed three consecutive attempts at answering challenge questions.
- The user has not logged in for a specific number of days based on the security community to which the application role has been assigned (e.g., Provider Security Community is 60 days).
- An EIDM Help Desk User has locked the account manually.

If your account is locked and you attempt to login, you will be redirected to the **Unlock My Account** page.

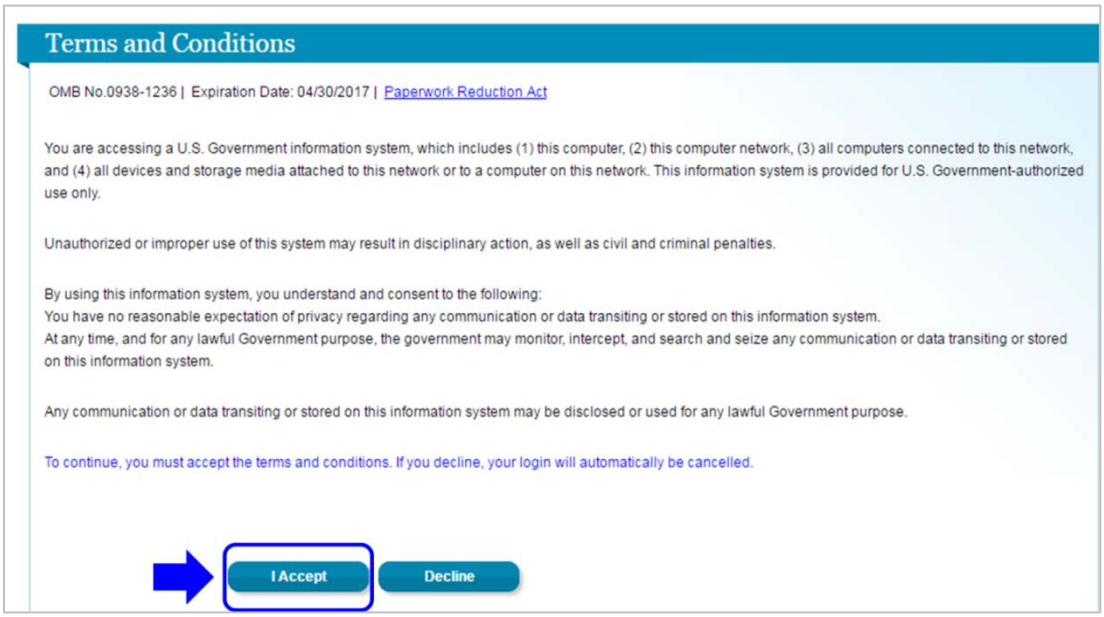
To unlock your account, **FOLLOW THESE STEPS**:

	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.

Step 2	Select **Login to CMS Secure Portal**.

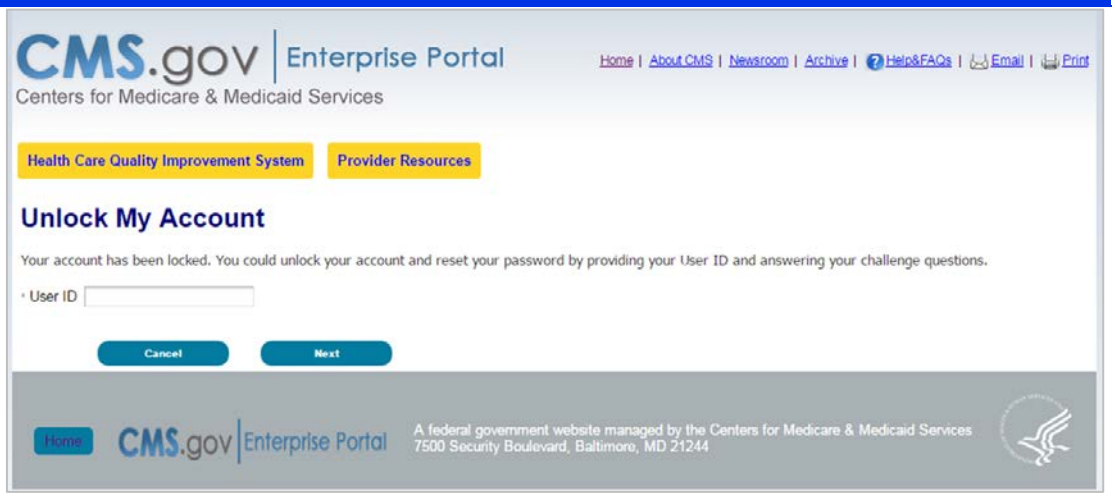
Action

Step 3 Read the **Terms and Conditions** and select **I Accept** to continue.

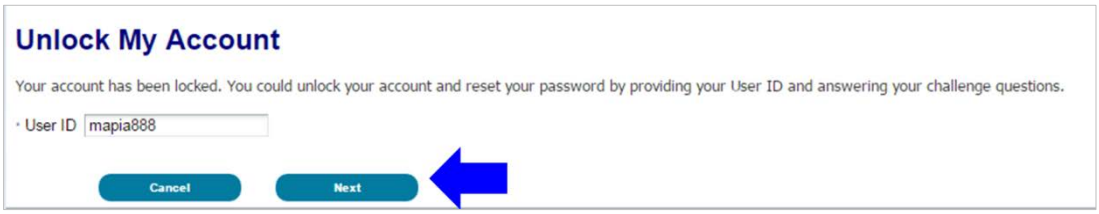


Step 4 You will be directed to the **Unlock My Account** page.

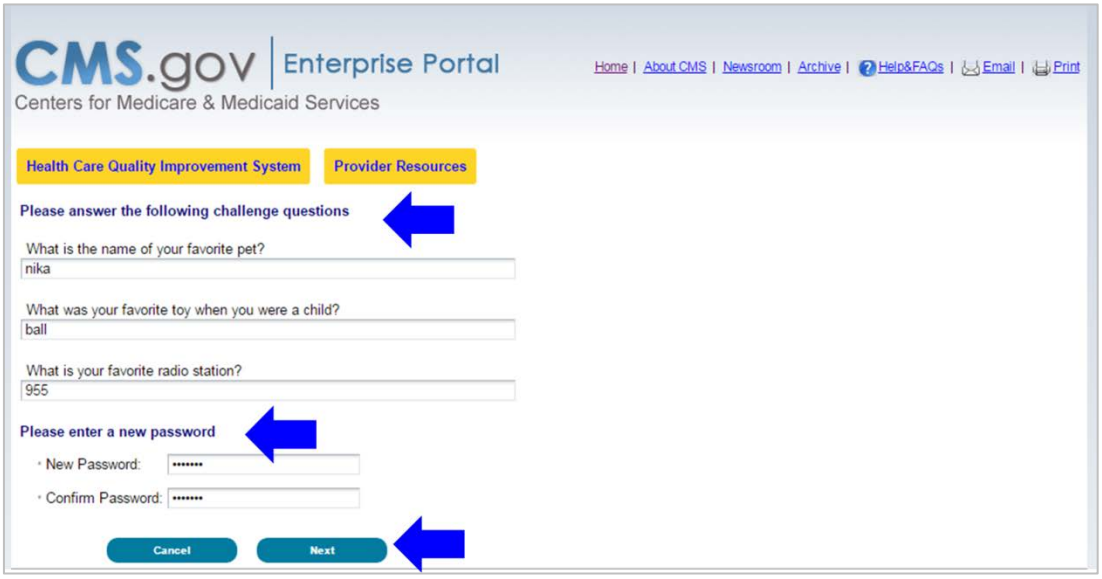
Action



Step 5 Enter your **User ID** and select **Next**.



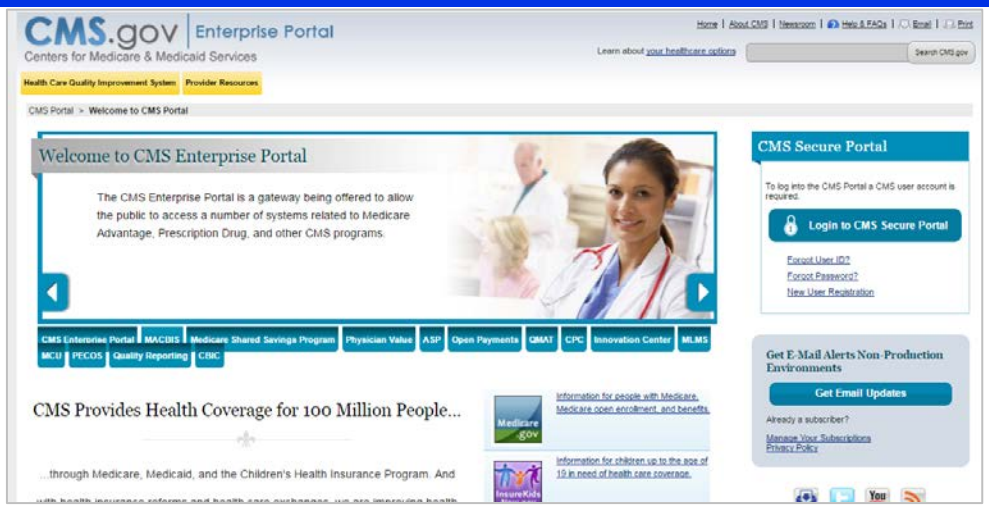
Step 5 Provide the answers to the challenge questions displayed. Enter a new password and select **Next**.



Step 5 Then **Unlock My Account** acknowledgement page is displayed. The page displays that your account has been unlocked successfully. Select **Next.**

You will be redirected to the **CMS Enterprise Portal** page to login to your account.

Action


CMS.gov Enterprise Portal
Centers for Medicare & Medicaid Services
Welcome to CMS Enterprise Portal
The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.
CMS Secure Portal
Login to CMS Secure Portal
Forgot User ID?
Forgot Password?
New User Registration
Get E-Mail Alerts Non-Production Environments
Get Email Updates
Already a subscriber?
Manage Your Subscriptions
Privacy Policy
CMS Provides Health Coverage for 100 Million People...
...through Medicare, Medicaid, and the Children's Health Insurance Program. And

How to Change Your User Profile

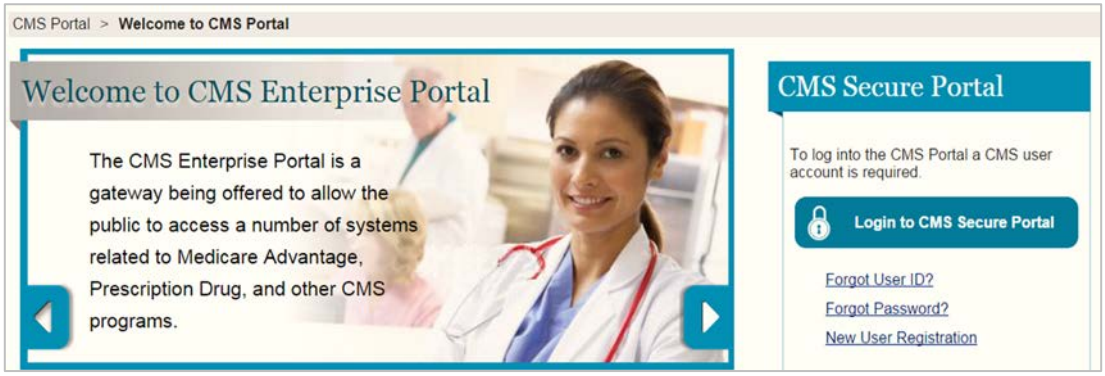
This section provides assistance and basic step-by-step instructions for the following:

- Forgot Your User ID?
- Forgot Your Password?
- How to View Your Profile.
- How to Change Your Password.
- How to Change Your E-mail Address.
- How to Change Your Security Challenge Questions and Answers.
- How to Change Your Phone Number.
- How to Change Your Home Address.

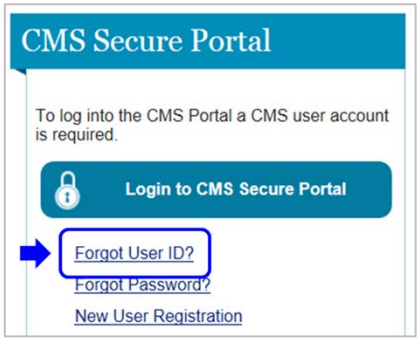
Forgot Your User ID?

The following are the basic step-by-step instructions on how to use the **Forgot User ID?** feature.

	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.



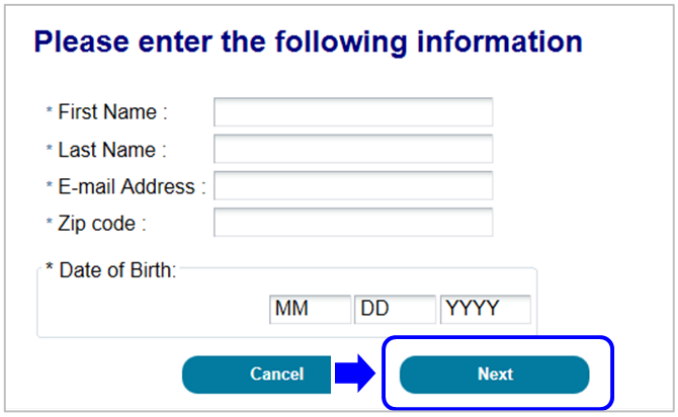
Step 2	Select the **Forgot User ID?** link.



	Action
Step 3	Provide the information requested and select **Next** to continue.

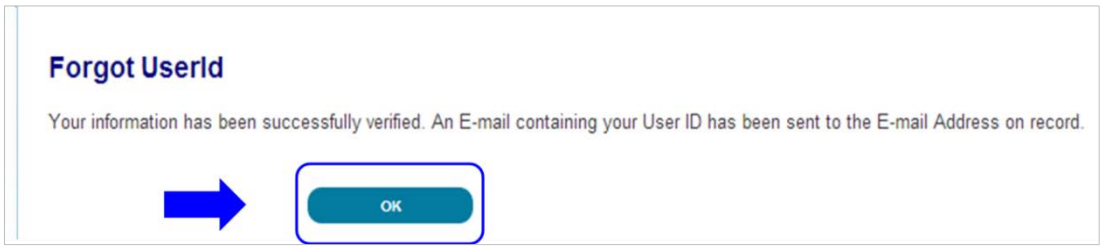
Note

You may select **Cancel** at any time to exit out of the **Forgot User ID** process. New information or changes entered will not be saved.



Step 4 After selecting **Next**, the **Forgot User ID** acknowledgement page is displayed. The page displays that the information entered has been verified and an E-mail, with your User ID, has been sent to the E-mail address on record.

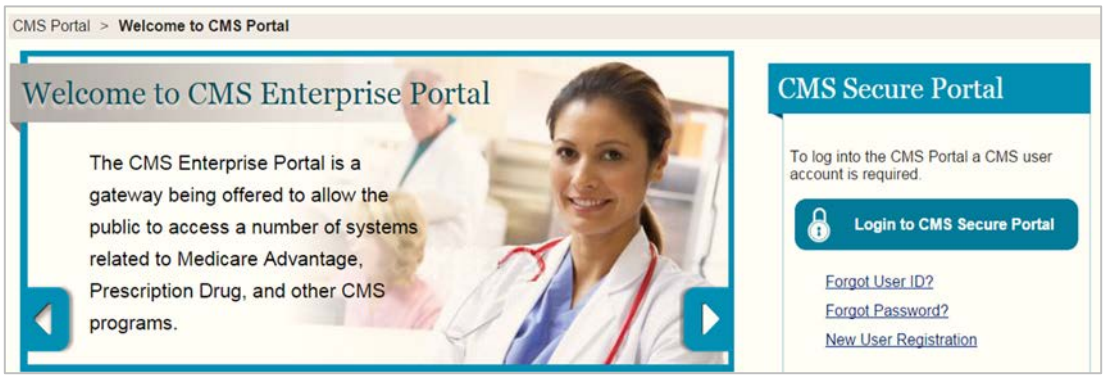
Select **OK** to close the page.



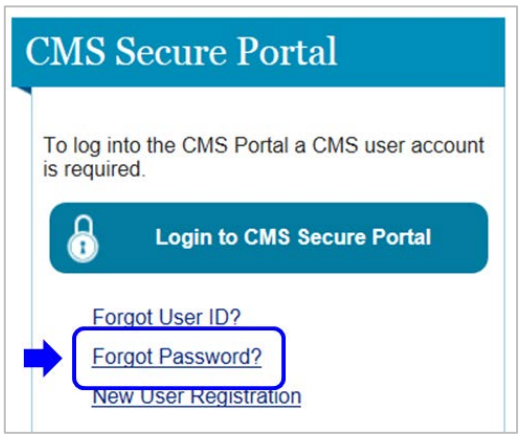
Forgot Your Password?

The following are the basic step-by-step instructions on how to use the **Forgot Password?** feature to create a new password.

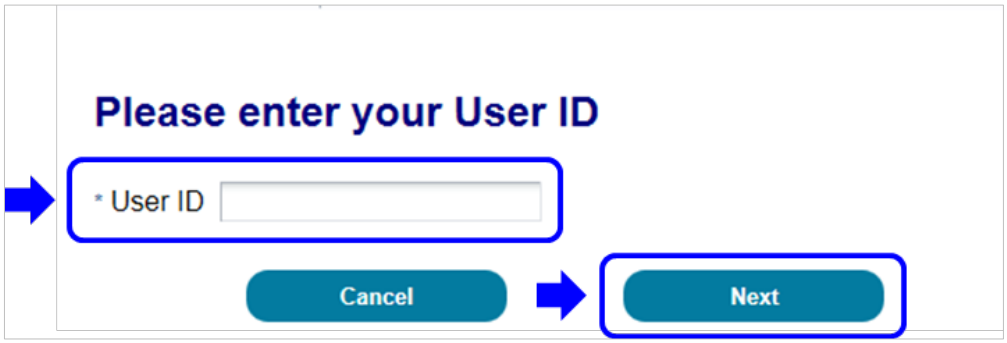
	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.



Step 2 Select the **Forgot Password?** link.



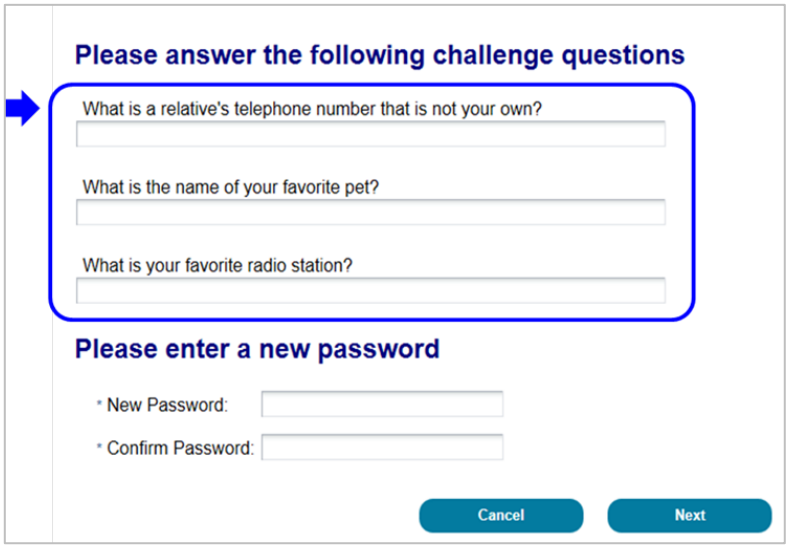
Step 3 Enter your **User ID** and select **Next** to continue.



Action	
Step 4	Provide the answers to the challenge questions displayed.
Step 5	Enter a new password. Re-enter the same password for "**Confirm Password**" and select **Next** to complete the Forgot Password process.

Notes

1. EIDM will display instructions on what you are required to include in your password.
2. Some roles may require you to enter an 8-character password for your new password. For example, if you have a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to create and enter an 8-character password for your new password. When you are required to enter an 8-character password, an error message will be displayed when a password has been entered that is longer than 8 characters.



Step 6	After selecting **Next**, the **Forgot Password** acknowledgement page is displayed. The page displays that the password has been changed and a confirmation E-mail has been sent to the E-mail address on record. Select **OK** to close the page.

Note

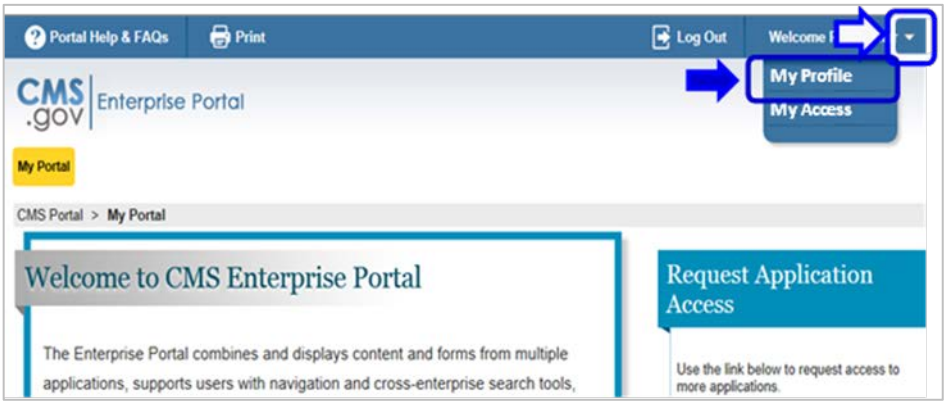
You may select **Cancel** at any time to exit out of the Forgot Password process. New information or changes entered will not be saved.

Action

Forgot Password
Your password has been successfully changed. A confirmation E-mail has been sent.
OK

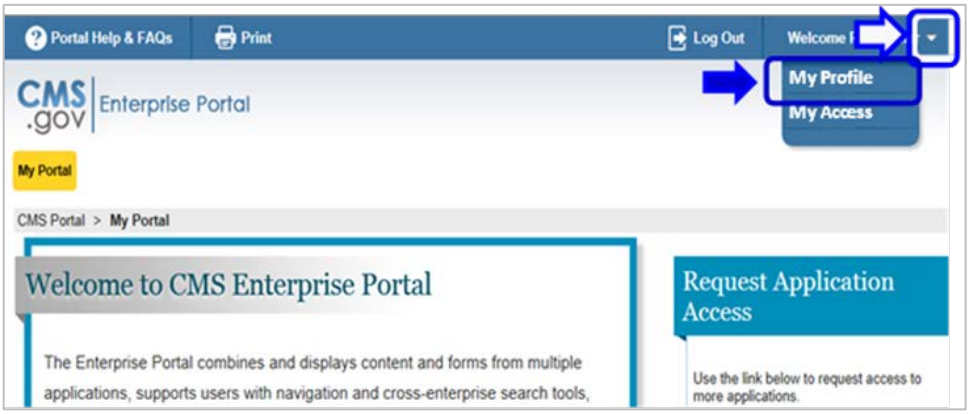
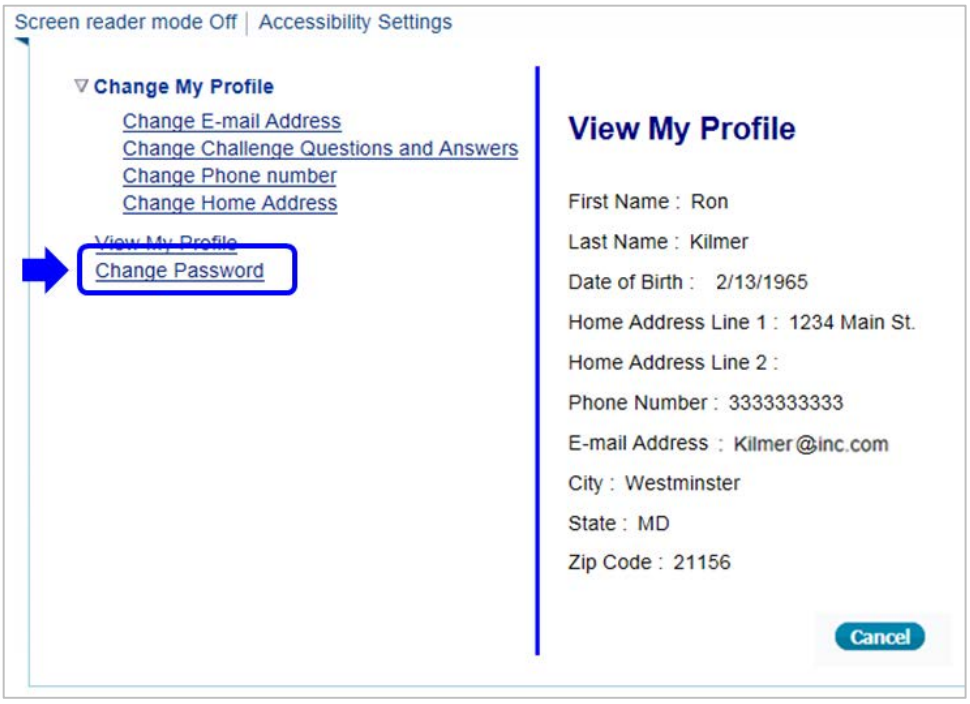
How to View Your Profile

The following are the basic step-by-step instructions on how to use the **View My Profile** feature to view your profile information.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the Terms and Conditions, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Profile** from the drop-down menu to continue. 
Step 2	The **View My Profile** page is displayed. After viewing your profile information, select **Cancel** to close the page.

How to Change Your Password

The following are the basic step-by-step instructions on how to use the **Change Password** feature to change your password.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the Terms and Conditions, and logging in with your User ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Profile** from the drop-down menu to continue. 
Step 2	The **View My Profile** page is displayed. Select **Change Password**. 

	Action
Step 3	The **Change Password** page is displayed. Enter your old password. Create and enter a new password of your choice in the **New Password** field.

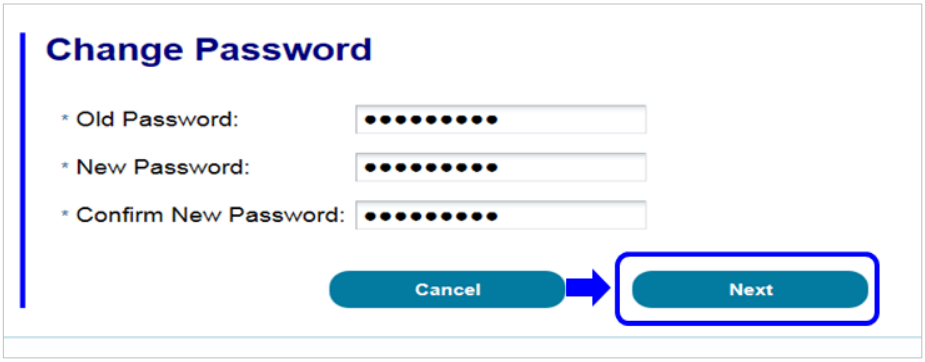
Notes

1. EIDM will display instructions on what you are required to include in your password.
2. Some roles may require you to enter an 8-character password for your new password. For example, if you have a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to create and enter an 8-character password for your new password. When you are required to enter an 8-character password, an error message will be displayed when a password has been entered that is longer than 8 characters.

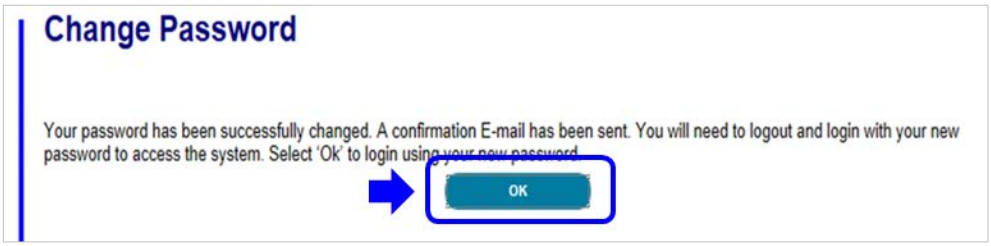
Re-enter the same password in the **Confirm Password** field and select **Next** to continue.

Note

You may select **Cancel** at any time to exit out of the Change Password process. New information or changes entered will not be saved.

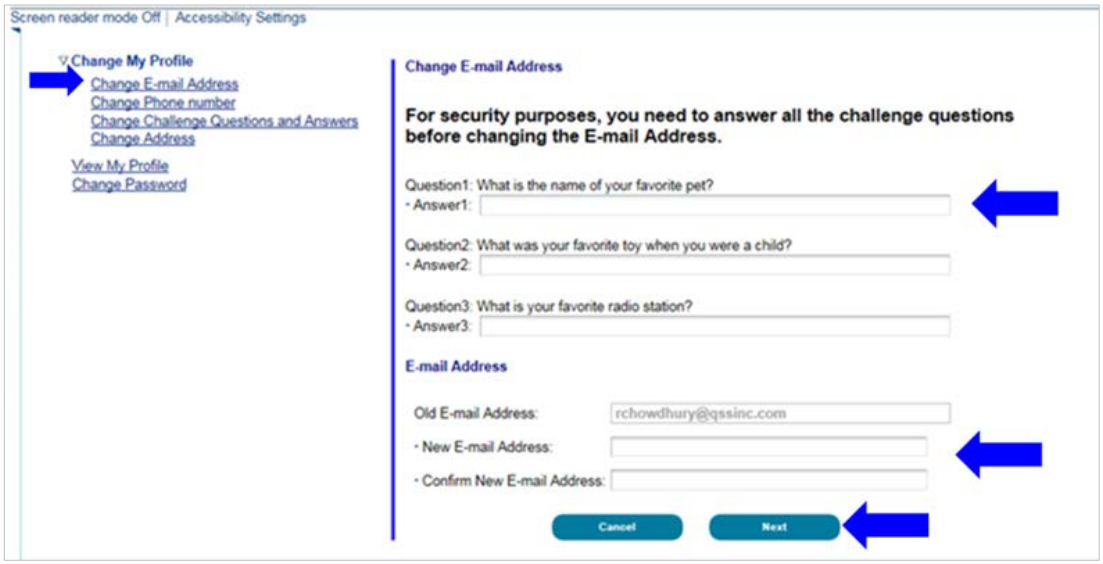


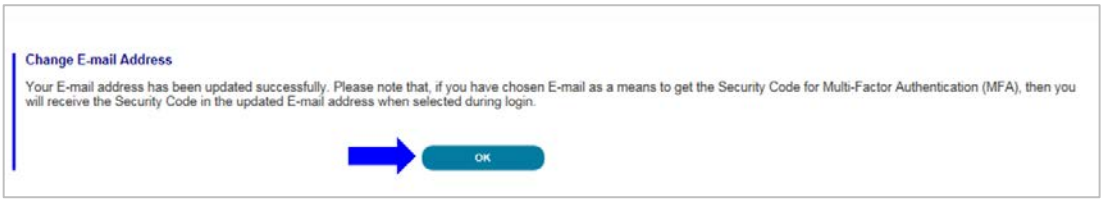
Step 4	After selecting **Next**, the **Change Password** acknowledgement page is displayed. The page displays that the password has been changed, a confirmation E-mail has been sent to the E-mail address on record, and you will need to logout and login with your new password. Select **OK** to close the page.



How to Change Your E-mail Address

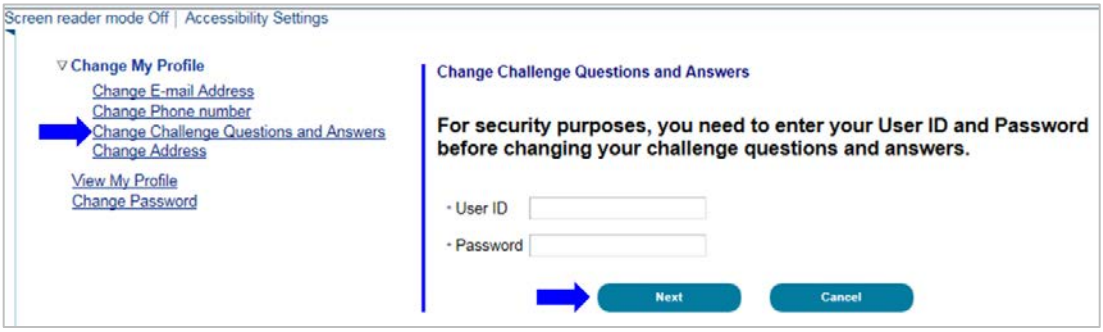
The following are the basic step-by-step instructions on how to use the **Change E-mail Address** feature to change your E-mail address.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the Terms and Conditions, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Profile** from the drop-down menu to continue.
Step 2	The **View My Profile** page is displayed. Select **Change E-mail Address**. Provide the answers to the challenge questions displayed. Enter your new E-mail address in the **New E-mail Address** field and then re-enter the E-mail address in the **Confirm New E-mail Address** field. **Note** You may select **Cancel** at any time to exit out of the Change Password process. New information or changes entered will not be saved. Select **Next** to complete the Change E-mail process. 

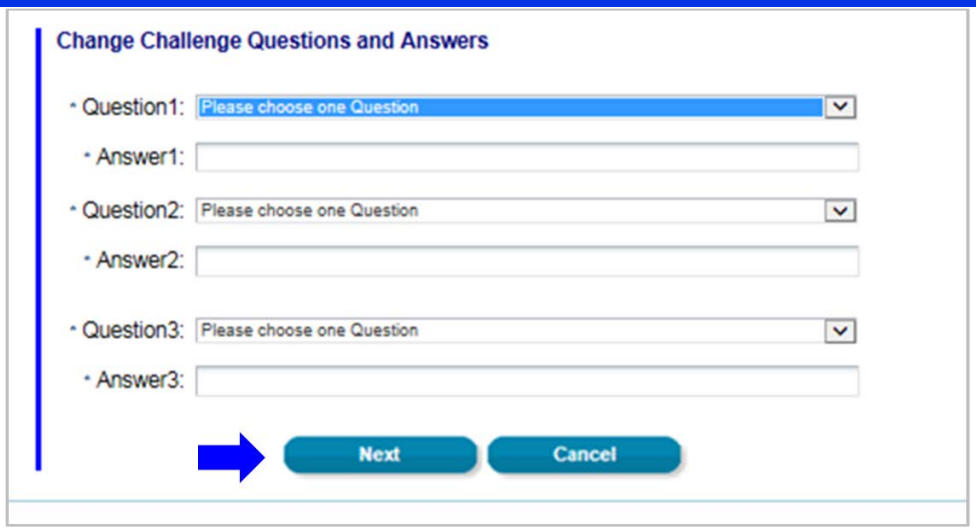
	Action
Step 3	After selecting **Next**, the **Change E-mail Address** acknowledgement page is displayed. Select **OK** to close the page. 

How to Change Your Security Challenge Questions and Answers

The following are the basic step-by-step instructions on how to use the **Change Challenge Questions and Answers** feature to change your security challenge questions and answers.

	Action
Step 1	After navigating to the CMS Enterprise Portal (https://portal.cms.gov), accepting the Terms and Conditions, and logging in with your user ID and password, the Welcome to CMS Enterprise Portal page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select My Profile from the drop-down menu to continue.
Step 2	The **View My Profile** page is displayed. Select **Change Challenge Questions and Answers**. Enter your **User ID** and **Password** and select **Next**. 
Step 3	The **Change Challenge Questions and Answers** page is displayed. Select a question and then provide an answer of your choosing. Continue until all three challenge questions have been selected and answered. Select **Next** to complete the Change Challenge Questions and Answers process. **Note** You may select **Cancel** at any time to exit out of the Change Challenge Questions process. New information entered will not be saved.

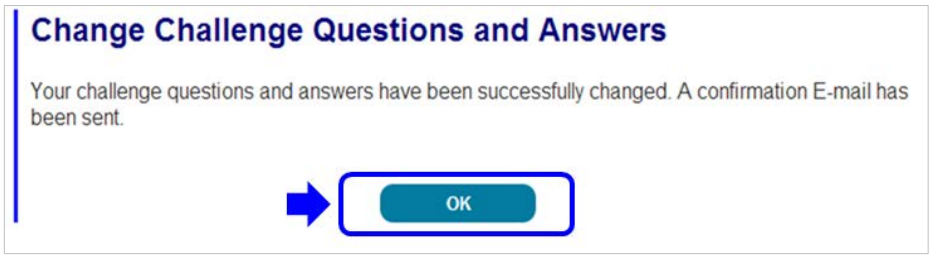
Action



Step 4 After selecting **Next**, the **Change Challenge Questions and Answers** acknowledgement page is displayed.

The page displays that the challenge questions and answers have been changed and a confirmation E-mail has been sent to the E-mail address on record.

Select **OK** to close the page.

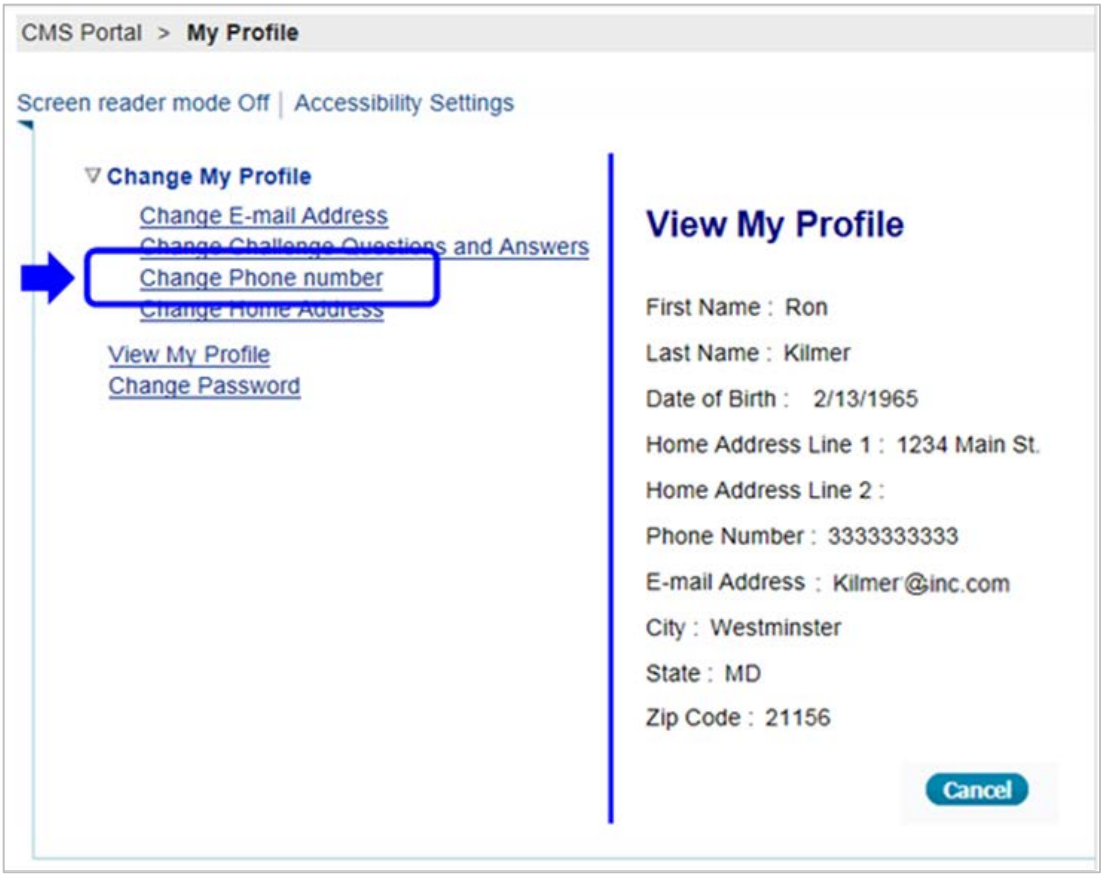


How to Change Your Phone Number

The following are the basic step-by-step instructions on how to use the **Change Phone number** feature to change your phone number.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the Terms and Conditions, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Profile** from the drop-down menu to continue.

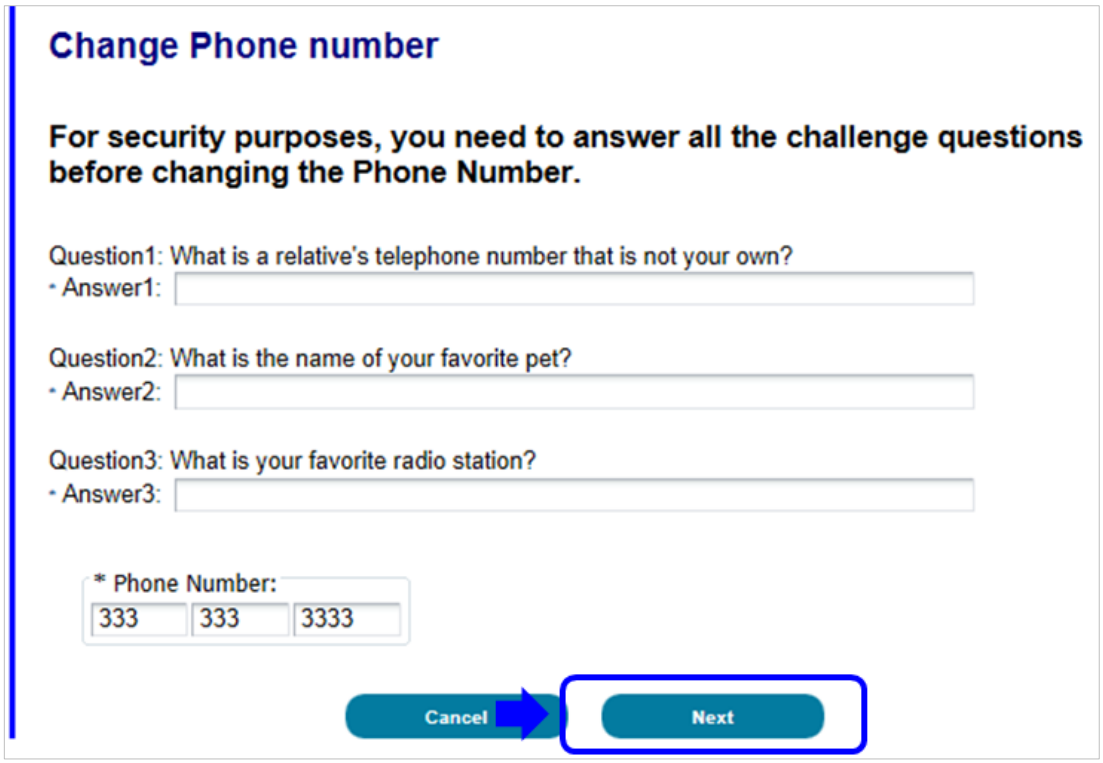
Step 2	The **View My Profile** page is displayed. Select **Change Phone number**.



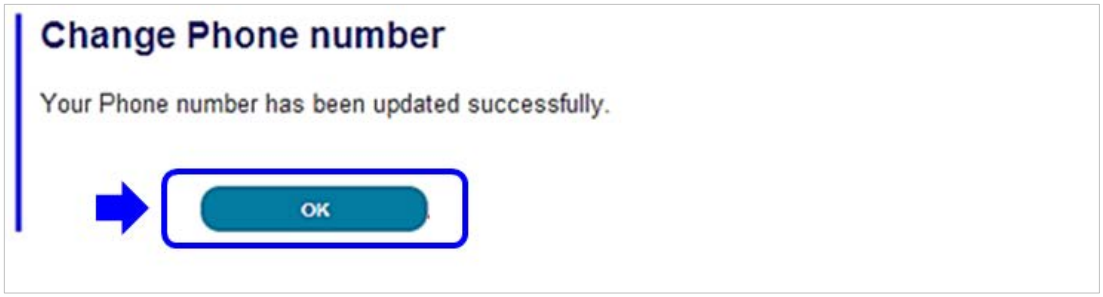
	Action
Step 3	The **Change Phone number** page is displayed. The current phone number on record for you is displayed in the **Phone Number** field. Provide the answers to all of the challenge questions displayed. Enter your new phone number in the Phone Number field. Select **Next** to continue.

Note

You may select **Cancel** at any time to exit out of the Change Phone number process. New information or changes entered will not be saved.

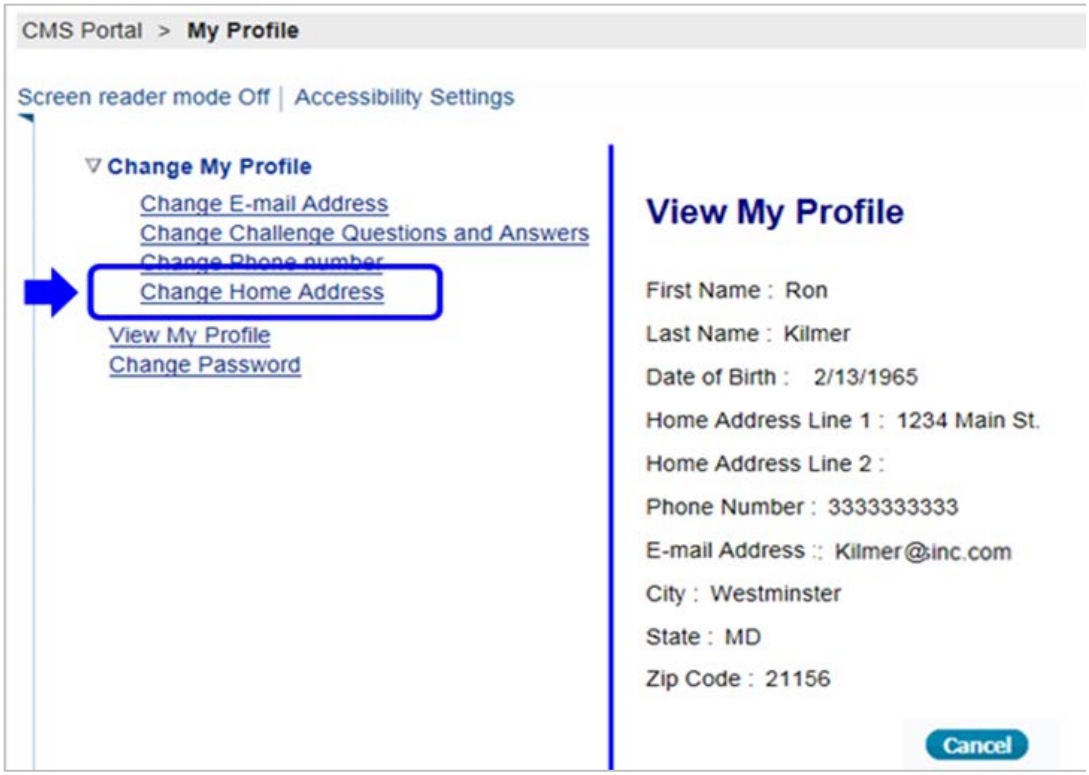


Step 4	After selecting **Next**, the **Change Phone number** acknowledgement page is displayed. The page displays that the phone number has been updated. Select **OK** to close the page.



How to Change Your Home Address

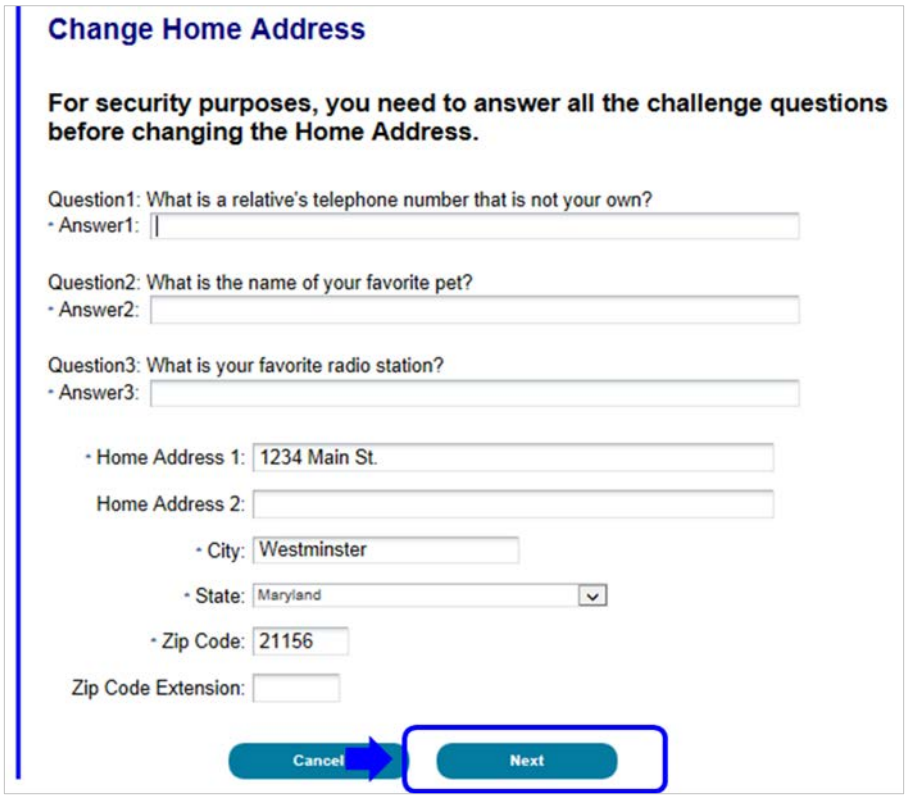
The following are the basic step-by-step instructions on how to use the **Change Home Address** feature to change your home address.

	Action
Step 1	After navigating to the **CMS Enterprise Portal** (https://portal.cms.gov), accepting the Terms and Conditions, and logging in with your user ID and password, the **Welcome to CMS Enterprise Portal** page is displayed. Select the down arrow icon that appears next to your name at the top of page. Then, select **My Profile** from the drop-down menu to continue.
Step 2	The **View My Profile** page is displayed. Select **Change Home Address**. 

	Action
Step 3	The **Change Home Address** page is displayed. The current home address on record is displayed in the **Home Address** field. Provide the answers to all of the challenge questions displayed. Enter your new home address information in the **Home Address** field. Select **Next** to complete the **Change Home Address** process.

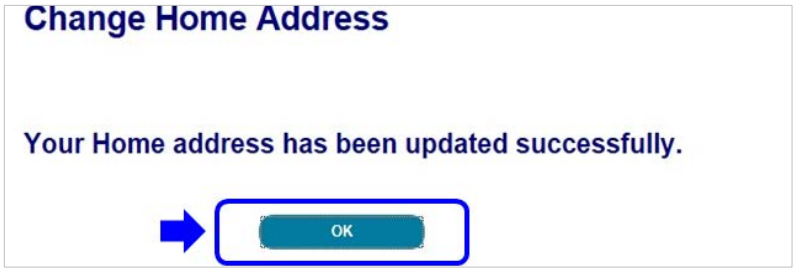
Note

You may select **Cancel** at any time to exit out of the Change Home Address process. New information or changes entered will not be saved.



Step 4 After selecting Next, the **Change Home Address** acknowledgement page is displayed. The page displays that the home address has been updated.

Select **OK** to close the page.



4. Help Desk Information

Application Help Desks

Application *(Help Desk Name)*	Phone	E-mail
Agents and Brokers (FFM - A/B) *(XOSC)*	855-267-1515	cms_feps@cms.hhs.gov
ASETT *(ASETT Help Desk)*	703-951-6810	asett@actionet.com
ASP *(ASP Help Desk)*	844-876-0765	asphelpdesk@dcca.com
Bundled Payments EFT *(Bundled Payments Help Desk)*	N/A	BundledPayments@cms.hhs.gov
CERRS *(Cognosante Help Desk)*	703-206-6199	servicedesk@cognosante.com
Cisco WebEx SaaS *(WebEx Support)*	410-786-3090 Opt 1	OTS_WebEx@cms.hhs.gov
CJR *(IBOSC Help Desk)*	844-711-266 *(Option 1)*	CJRSupport@cms.hhs.gov
COB *(MAPD Help Desk)*	800-927-8069	mapdhelp@cms.hhs.gov
Connexion *(CBIC Help Desk)*	877-577-5331	CBIC.admin@palmettogba.com
CPC (Innovation Center HD) *(Actionet Help Desk)*	N/A	CICDIMServiceDesk@actionet.com
CPMS *(XOSC)*	855-267-1515	CMS_feps@cms.hhs.gov
CSR *(MAPD Help Desk)*	800-927-8069	mapdhelp@cms.hhs.gov
DBidS/DMEPOS *(CBIC Help Desk)*	877-577-5331	CBIC.admin@palmettogba.com
ECRS *(EDI Help Desk)*	646-458-6740	ECRSHelp@EHMedicare.com
ELMO *(MAPD Help Desk)*	800-927-8069	mapdhelp@cms.hhs.gov
EPPE *(EPPE Help Desk)*	844-377-3382	eppe@cms.hhs.gov
e-RPT *(MAPD Help Desk)*	800-927-8069	mapdhelp@cms.hhs.gov

Application *(Help Desk Name)*	Phone	E-mail
ESD *(ESD Help Desk)*	TBD	TBD
FCSO aka The Spot *(FCSO Help Desk)*	855-416-4199	FCSOSpotHelp@FCSO.com
Gentran *(Gentran Support)*	N/A	Gentran-support@cms.hhs.gov
HHVBP *(IBOSC Help Desk)*	844-280-5628	hhvbpquestion@cms.hhs.gov
HIOS *(XOSC)*	855-267-1515	cms_feps@cms.hhs.gov
HPG *(MCARE/ HPG Help Desk)*	866-440-3805	mcare@cms.hhs.gov
IC (Innovation Center) *(Actionet Help Desk)*	N/A	CICDIMServiceDesk@actionet.com
Internet Server *(ISV Help Desk)*	N/A	ISV-Support@cms.hhs.gov
MACPro *(MACPro Help Desk)*	301-547-4688	MACPro_HelpDesk@cms.hhs.gov
MARx *(MAPD Help Desk)*	800-927-8069	mapdhelp@cms.hhs.gov
MCU *(XOSC)*	855-267-1515	CMS_feps@cms.hhs.gov
MDR *(MAPD Help Desk)*	800-927-8069	mapdhelp@cms.hhs.gov
MED *(EUS Help Desk)*	866-484-8049	eussupport@cgi.com
MLMS *(MLMS Help Desk)*	N/A	MLMSHelpDesk@cms.hhs.gov
MyCGS *(MyCGS Help Desk)*	866-270-4909	cgs.dme.mac.email.inquiries@cgsadmin.com
Novitas *(Novitas Help Desk)*	877-235-8073	NovitasphereHelp@novitas-solutions.com
Open Payments *(Open Payments Help Desk)*	855-326-8366	OpenPayments@cms.hhs.gov
Physicians Value *(PV Help Desk)*	866-288-8912	pvhelpdesk@cms.hhs.gov
PMDA *(PMDA Help Desk)*	443-775-3226	pmda1115_cvp_help@cvpcorp.com

Application *(Help Desk Name)*	Phone	E-mail
PQRS *(QualityNet Help Desk)*	866-288-8912	qnet-hd-support-queue@hcqis.org
PS&R/STAR *(EUS Help Desk)*	866-484-8049	eussupport@cgi.com
QARM *(QualityNet Help Desk)*	866-288-8912	qnet-hd-support-queue@hcqis.org
QMAT *(CEC Help Desk)*	888-734-6433	ESRD-CMMI@cms.hhs.gov
Salesforce *(CMS Salesforce and Force.com)*	888-734-6433 *(Option 5)*	CMMIForceSupport@cms.hhs.gov
SERTS *(XOSC)*	855-267-1515	CMS_feps@cms.hhs.gov
SERVIS *(XOSC)*	855-267-1515	CMS_feps@cms.hhs.gov
SHOP/SHIM *(SHOP Call Center/Support)*	800-706-7893	N/A
SLS *(SLS Support)*	N/A	sls@ffm2.org
T-MSIS *(T-MSIS Help Desk)*	N/A	T-MSIS_Helpdesk@cms.hhs.gov
UCM *(UCM Help Desk)*	844-826-3375	ucmsupport@cms.hhs.gov
VMS Client Letter *(GDIT Technical Help Desk)*	443-275-6946 *(Option 2)*	THD@gdit.com
zONE *(XOSC)*	855-267-1515	CMS_feps@cms.hhs.gov

Table 1: Application Help Desks

5. Acronyms

Acronym	Literal Translation
ACO	Accountable Care Organization
AIA	Automated Intervention Application
AO	Authorized Official
BAO	Backup Authorized Official
BCRC	Benefits Coordination & Recovery Center
CAHPS	Consumer Assessment of Healthcare Providers and Systems
CBA	Competitive Bidding Area
CBIC	Competitive Bidding Implementation Contractor
CGS	Celerian Group Administrators, LLC (collectively "CGS")
CHIP	Children's Health Insurance Program
CMS	Centers for Medicare & Medicaid Services
COB	Coordination of Benefits
CPC	Comprehensive Primary Care
CSR	Customer Service Representative
CWF	Common Working File
DBidS	DMEPOS Bidding System
DME	Durable Medical Equipment
DMEPOS	Durable Medical Equipment, Prosthetics, Orthotics & Supplies
ECRS	Electronic Correspondence Referral System
EFT	Electronic File transfer
EIDM	Enterprise Identity Management
EP	Eligible Professional
EPOC	External Point of Contact (EPOC)
FCSO	First Coast Service Options (The SPOT)
GPRO	Group Practice Reporting Option
GUI	Graphical User Interface
HETS	HIPAA Eligibility Transaction System
HPG	HIPAA Eligibility Transaction System (HETS) Provider Graphical User Interface (GUI)
IDP	Identity Proofing
IVR	Interactive Voice Response

Acronym	Literal Translation
LBN	Legal Business Name
LOA	Level of Assurance
LSA	Local System Administrator
MA	Medicare Advantage
MAC	Medicare Administrative Contractor
MAPD	Medicare Advantage - Prescription Drug
MARx	Medicare Advantage and Prescription Drug System
MCO	Medicaid Managed Care Organization
MDR	Medicaid Drug Rebate
MED	Medicare Exclusion Database
MFA	Multi-Factor Authentication
MMP	Medicare and Medicaid Plan
MSP	Medicare Secondary Payer
NPI	National Provider Identifier
OOW	Out-of-Wallet
OTP	One-time Password
PDE	Prescription Drug Event
PDP	Prescription drug Plan
POS	Point Of Service
POS	Point of Sale
POSFE	Point-of-Sale Facilitated Enrollment
PQIP	Physician Quality Initiatives Portal
PQRS	Physician Quality Reporting System
PS&R	Provider Statistical and Reimbursement
PTAN	Provider Transaction Access Number
PV	Physician Value
PY	Payment Year
QRUR	Quality and Resource Use Report
RACF	Resource Access Control Facility
RAPS	Risk Adjustment Processing System
RIDP	Remote Identity Proofing
SHIP	State Health Insurance Plans

Acronym	Literal Translation
SMS	Short Message Service
SPAP	State Pharmacy Assistance Programs
SR	Service Request
SSN	Social Security Number
STAR	System for Tracking Audit and Reimbursement
TIN	Taxpayer Identification Number
TT	Trouble Ticket
UI	User Interface
VMS	ViPS Medicare System
XLC	eXpedited Life Cycle
XLS	Microsoft Excel Workbook

Table 2: Acronyms