DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services

Office of Technology Solutions

EUA Front-End Interface (EFI)

POC Guide

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1.0 INTRODUCTION

When a contract is entered into the Enterprise User Administration (EUA) Front-End Interface (EFI) system, a primary Point of Contact (POC) is designated. **The POC possesses Approval Authority for that contract.** A user may request to be a POC Approval Authority for multiple contracts. Approval Authority will provide the user the ability to manage access requests only for those specific contracts. The **Manage > POC Access Request** feature allows POC the ability to search for access requests, review the information provided for the access request, approve the request, return it to the requester for modification, or reject and delete the request.

A POC must first register for an EFI account before they can manage access requests (refer to the **EFI New User Guide** for instructions on the registration process). During the registration process, **the email address entered by the user will be matched against the contract's POC email address in the system**. If there is a match between the email address entered by the user during the registration process and the contract's POC email address, the user will be assigned with the POC role. The **POC will need to fill out the form online and just click the Save Request button** (this is to create the new POC record in EFI).

In many cases, the **primary POC would like to delegate Approval Authority to other users** empowering them to manage access requests on the POC's behalf. In order to approve requests in EFI and to be the new Approval Authority delegate, a non-POC user must register first for an EFI account (refer to the **EFI New User Guide** for instructions on the registration process). **The new POC requesting authority** will need to login in EFI click on the username link at the top menu and then click on the Manage Authorities option in order to initiate the request for Approval Authority by typing the primary POC's email address. The primary POC will then choose to grant or deny the Approval Authority to the requester. The request for Approval Authority will be sent to the contract's POC email address and the primary POC will be able to grant or deny it directly from the link options provided in the email. **Once the Approval Authority is granted, the new POC delegated authority will be able to manage access request on the POC's behalf. If the POC email address is incorrect please work with your COR** (Contract Officer Representative) to have the CO (Contract Officer) to update this in the CAMS (Comprehensive Acquisition Management System) system.

2.0 APPROVE ACCESS REQUEST

The following steps will guide the POC Approver on how to review the access request, attest to its accuracy, and approve it. An email confirmation will be sent to the applicant informing them of the approval.

STOP: Before you start to manage access requests you will need to have an EFI account (Please refer to the EFI New User Guide for instructions on the registration process) and ask your CMS COR for assistance. If you are the primary POC from the contract please make sure to use the exact email address during the registration process as it will be matched against the contract's POC email address. If there is a match between the email address entered and the contract's POC email address, you will be assigned the POC role. If there is not a match, as a POC (primary or delegated) you will need to fill out the form online and just click the Save Request button (this is to create the new POC record in EFI).

1. From the EFI login page (EUA-EFI Home Page) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

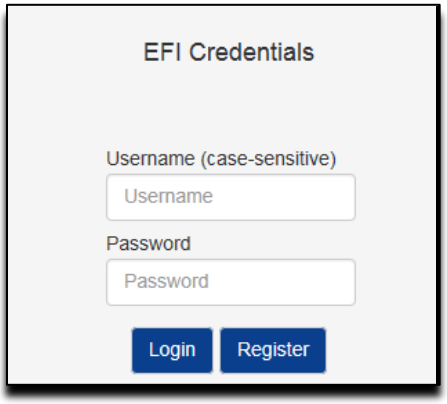


Figure 1: Login with Username/Password – EFI Credentials section

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful login will take you to the EFI Home page, please go to the top menu and click **Manage** and then click on **POC Access Requests**.

   Note: You can verify if you have the EFI Point of Contact Role when you click on the username link on the top menu.

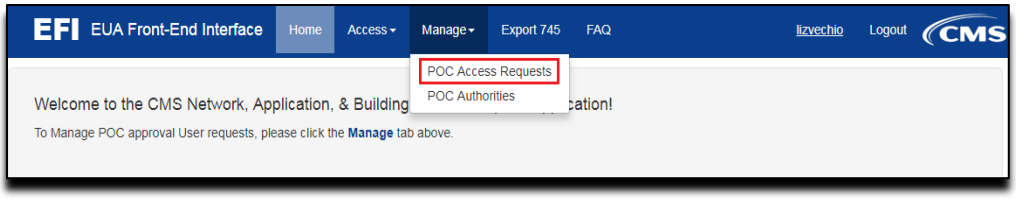


Figure 2: POC Access Requests – Menu

3. Search for the request using the **Search** text field on the "Manage Submitted Access Requests" page.
4. Click the **Review** link button for the request you want to review and then approve once you verified the information in the applicant request is correct.

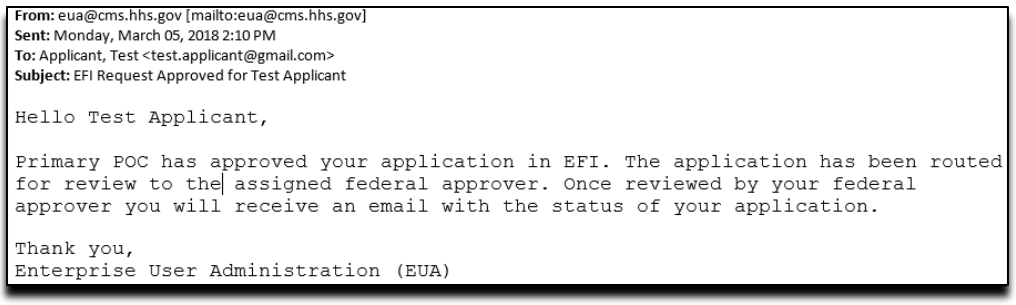
Note: The PIV Request column displays the Reason for Issuance for the request with values of New Application, Renewal, Lost, Stolen, Damaged, Expired, Name Change, and Other.

Figure 3: Manage Submitted Access Requests – Page

5. Once you complete the review of the applicant request and before proceeding, you will need to click the Attestation check box (required), so the **Approve** button becomes available for your approval.

Figure 4: Approve Access Request – Button

6. An email confirmation will be sent to the applicant and to the POC approver (both will receive separate emails) to notify of the request approval.



From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, March 05, 2018 2:10 PM
To: Applicant, Test <test.applicant@gmail.com>
Subject: EFI Request Approved for Test Applicant

Hello Test Applicant,

Primary POC has approved your application in EFI. The application has been routed for review to the assigned federal approver. Once reviewed by your federal approver you will receive an email with the status of your application.

Thank you,
Enterprise User Administration (EUA)

Figure 5: Email notification of the request approved

3.0 RETURN ACCESS REQUEST FOR MODIFICATION

The following steps will guide the POC Approver on how to review the access request, indicate the Access Request form fields that need to be reviewed, and how to send it back to the requester for modification. An email confirmation will be sent to the requester informing them of the required modification. When the requester goes back to view the request, the form fields and the sections will be marked for correction.

1. From the EFI login page (EUA-EFI Home Page) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

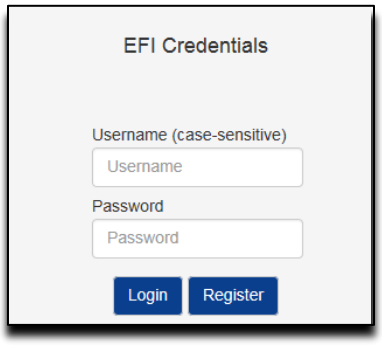


Figure 6: Login with Username/Password – EFI Credentials section

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful login will take you to the EFI Home page, please go to the top menu and click **Manage** and then click on **POC Access Requests**.

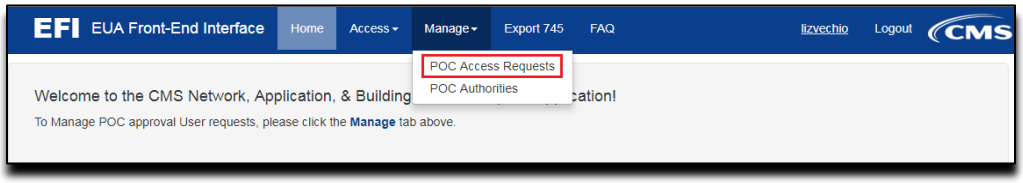


Figure 7: Return Access Request for Modification – Menu

3. Search for the request using the **Search** text field on the “Manage Submitted Access Requests” page.
4. Click the **Review** link button for the request you want to review to make sure that the information in the applicant request is correct

Figure 8: Return Access Request for Modification – Page

5. Review the request information and click the **Return For Modification** button on the Status page.

Figure 9: Return Access Request for Modification – Button

6. From the *Section* and *Field* dropdown options, provide a *Reason* in the "Decline Reasons" pop-up box for each revision you would like the requester to make changes.
7. Click the **Add** button to add another field to review. For the "Reason", you will need to type less than 255 characters.

   Note: "Problems:" counter indicates how many fields are already indicated to be revised.

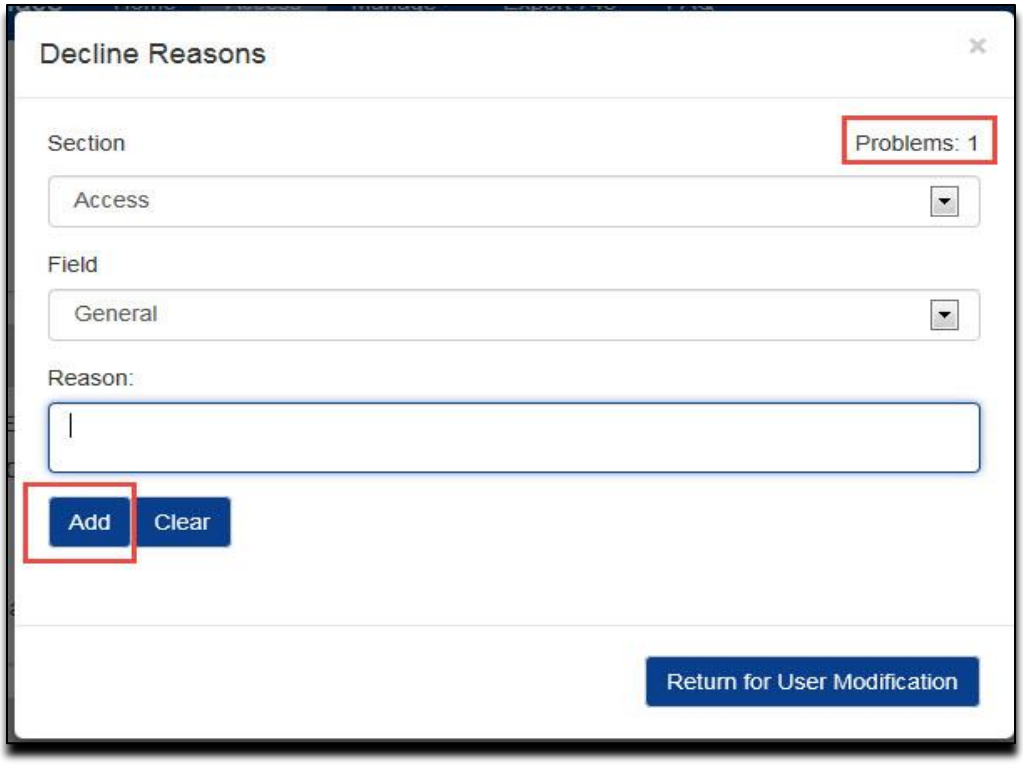


Figure 10: Return Access Request for Modification - Decline Reasons Form

8. Once you have indicated all the fields for revision, click the **Return for User Modification** button.
9. An email confirmation message will be sent to the applicant with information on how to correct the request.

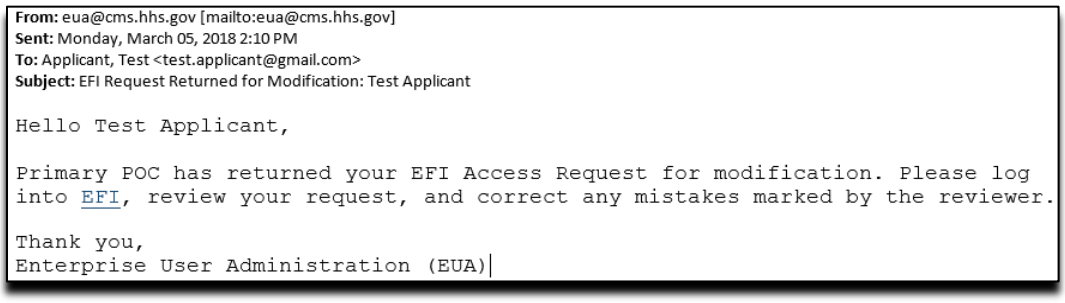


Figure 11: Email Notification of the Request Returned for Modification

4.0 REJECT AND DELETE ACCESS REQUEST

The following steps will guide the POC Approver on how to reject and delete the access request from the system. The POC may choose to provide a reason for the deletion of the request. Once the access request has been deleted, the requester's account will be deleted from the EFI system as well. An email message will be sent to the requester informing them of the deletion. If the requester would like to re-submit the request, they would need to re-register on EFI and re-create the access request.

1. From the EFI login page (EUA-EFI Home Page) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

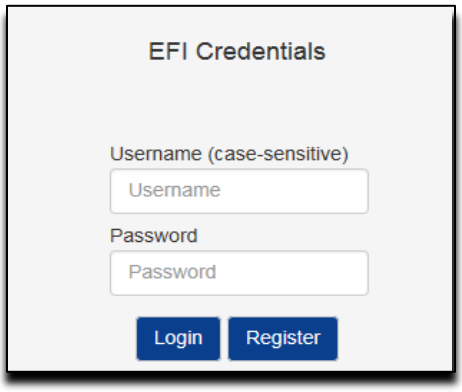


Figure 12: Login with Username/Password – EFI Credentials section

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful login will take you to the EFI Home page, please go to the top menu and click **Manage** and then click on **POC Access Requests.**

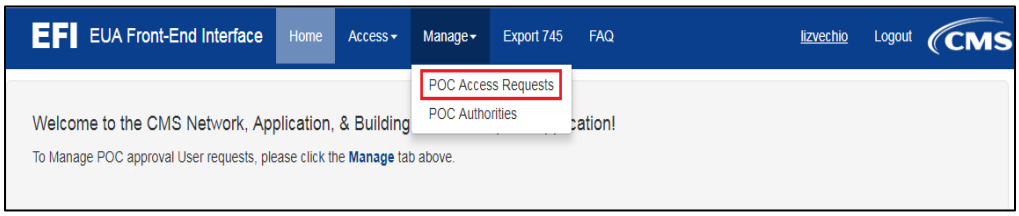


Figure 13: Reject and Delete Access Request – Menu

3. Search for the request using the **Search** text field on the "Manage Submitted Access Requests" page.
4. Click the **Review** link button for the request you want to review.

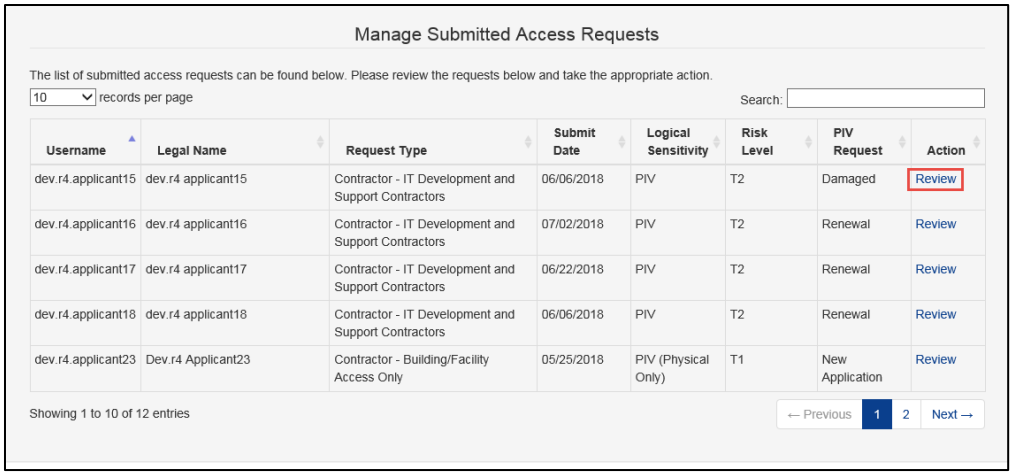


Figure 14: Reject and Delete Access Request – Page

5. Review the request information and click the **Reject and Delete** button on the Status page.

Figure 15: Reject and Delete Access Request – Button

6. Provide a *Decline Reason* and then click the **Reject and Delete** button again on the pop-up box.

Figure 16: Reject and Delete Access Request - Pop-up Box

Note: For the "Decline Reason", you will need to type less than 255 characters.

7. An e-mail confirmation will be sent to the requester informing them of the rejection of their request. The user will need to re-register and submit another request if needed.

5.0 REQUEST POC APPROVAL AUTHORITY

The following steps will guide a regular user on how to request POC Approval Authority from the primary POC using the POC's email address designated in the contract. An email message will then be sent to the primary POC prompting them to grant or deny Approval Authority to the requester. Once POC Approval Authority is granted, the user will be able to view, approve, return for modification, reject and delete access requests on behalf of the POC.

STOP: Before you start you will need to have an EFI account (Please refer to the EFI New User Guide for instructions on the registration process) and ask your CMS COR for assistance. Please make sure to use the contract's POC email address in order to obtain the POC role.

Note: The primary POC needs to register and have an EFI account so when the approval authority is requested by another user, the POC role can be added. Approval Authority can be granted to more than one designated user from the contractor company.

1. From the EFI login page (EUA-EFI Home Page) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

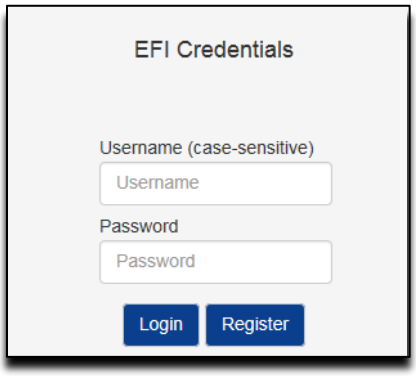


Figure 17: Login with Username/Password – EFI Credentials section

2. From the EFI top menu, click the username link button on the EFI home page.

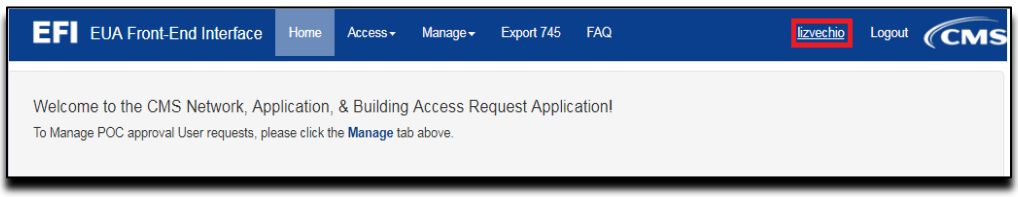


Figure 18: Request Approval Authority – Menu

3. Click the **Manage Authorities** link button on the “Account Details” page.

Figure 19: Request Approval Authority - Account Details Page

4. In the **Add Email Address** text field, enter the email address of the primary POC (setup in the contract) on whose behalf you are requesting POC delegated authority and then click the **Add** button.

Figure 20: Request Approval Authority - Add POC Email

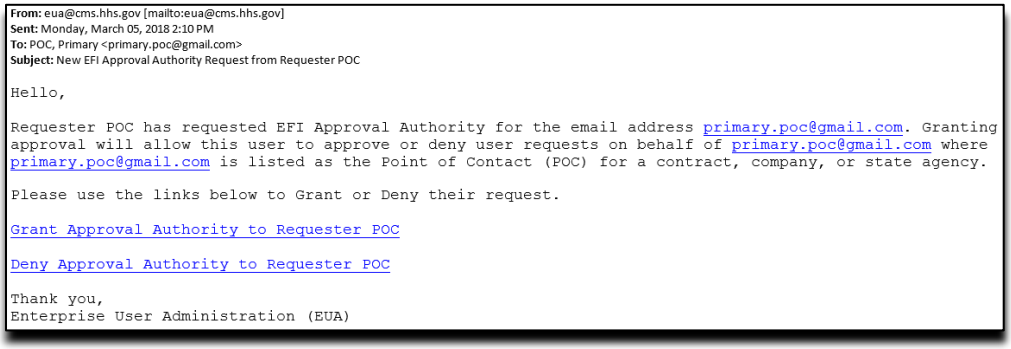
5. An email will be sent to the primary POC from your delegated approval authority request.

6.0 APPROVE AND DENY APPROVAL AUTHORITY

The following steps will guide the primary POC on how to review an email message when an Approval Authority request has been made. Two links are provided to grant or deny Approval Authority to the requester(s).

Note: The primary POC will approve or deny the delegated approval in an email only.

1. As a primary POC you will receive an email if a user has requested Approval Authority.
2. Review the EFI **Approval Authority Request email** and click either the **Grant Approval Authority to <user>** or **Deny Approval Authority to <user>** link from within the email in order to grant or deny Approval Authority. After you click one of the links based on your decision then you will be re-directed to the EFI login page with a confirmation for the Approval Authority denied or granted (Figures 6 and 7).



From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, March 05, 2018 2:10 PM
To: POC, Primary <primary.poc@gmail.com>
Subject: New EFI Approval Authority Request from Requester POC

Hello,

Requester POC has requested EFI Approval Authority for the email address primary.poc@gmail.com. Granting approval will allow this user to approve or deny user requests on behalf of primary.poc@gmail.com where primary.poc@gmail.com is listed as the Point of Contact (POC) for a contract, company, or state agency.

Please use the links below to Grant or Deny their request.

Grant Approval Authority to Requester POC

Deny Approval Authority to Requester POC

Thank you,
Enterprise User Administration (EUA)

Figure 21: Approve and Deny Approval Authority - Request Email

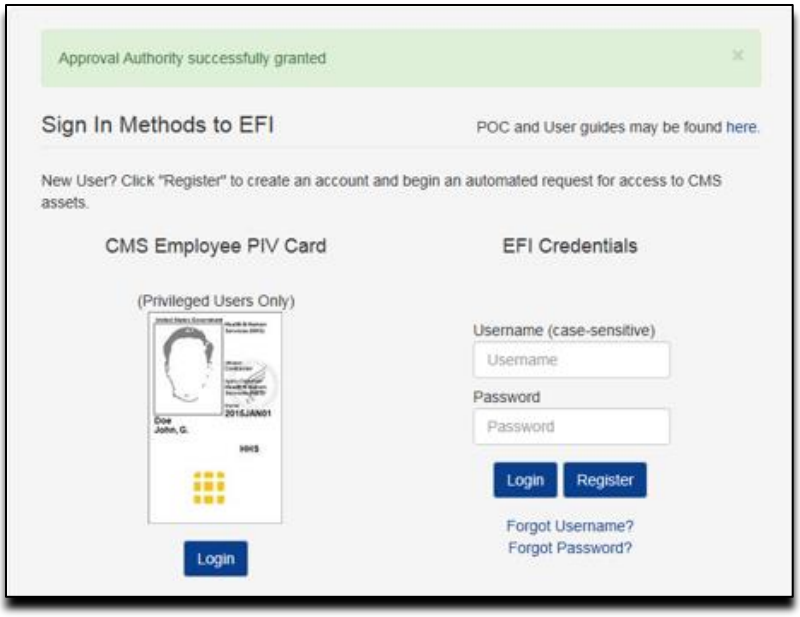


Figure 22: Approval Authority Granted

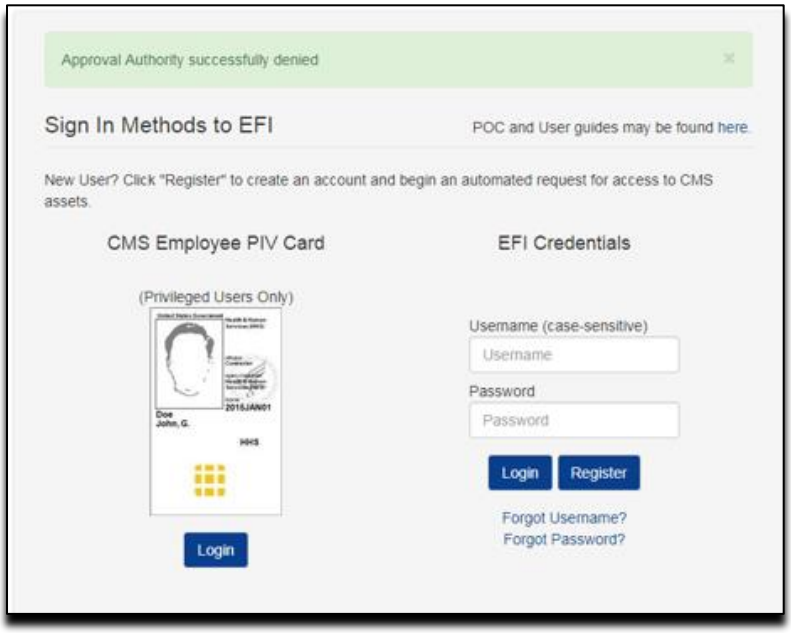


Figure 23: Approval Authority Denied

3. An **email confirmation** will be sent to the user who requested Approval Authority informing of the decision.

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, March 05, 2018 2:10 PM
To: POC, Requester <requester.poc@gmail.com>
Subject: New EFI Approval Authority Granted for Requester POC

Hello,

Approval Authority request primary.poc@gmail.com made by Requester POC has been approved. To manage requests, please log into EFI and use the manage tab.

Thank you,
Enterprise User Administration (EUA)

Figure 24: Approval Authority Granted - E-mail Confirmation

7.0 MANAGE APPROVAL AUTHORITY

The following steps will guide the POC on how to view all the users with delegated Approval Authority. The POC also has the option to remove Approval Authority from a user after an authority has been granted.

1. From the EFI login page (EUA-EFI Home Page) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. Please note that **EFI is case-sensitive**.

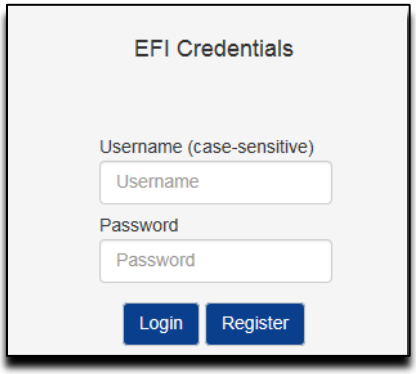


Figure 25: Login with Username/Password – EFI Credentials section

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful login will take you to the EFI Home page, please go to the top menu and click **Manage** and then **POC Authorities.**

Figure 26: Manage Approval Authority – POC Authorities Menu

3. Select from the list or search for the POC who made the request for Approval Authority using the **Search** text field on the “Manage Point of Contact (POC) Delegated Approval Authorities” page.

Figure 27: Manage Approval Authority – Page

4. The “Approved” status of **true** indicates Approval Authority was given to that user while **false** indicates the approval is still pending and you should look for an email request. You can click on the **Remove** link button in order to remove the user’s Approval Authority.

8.0 WHERE TO FIND THIS POC GUIDE

This POC Guide is accessible from the EFI login screen.

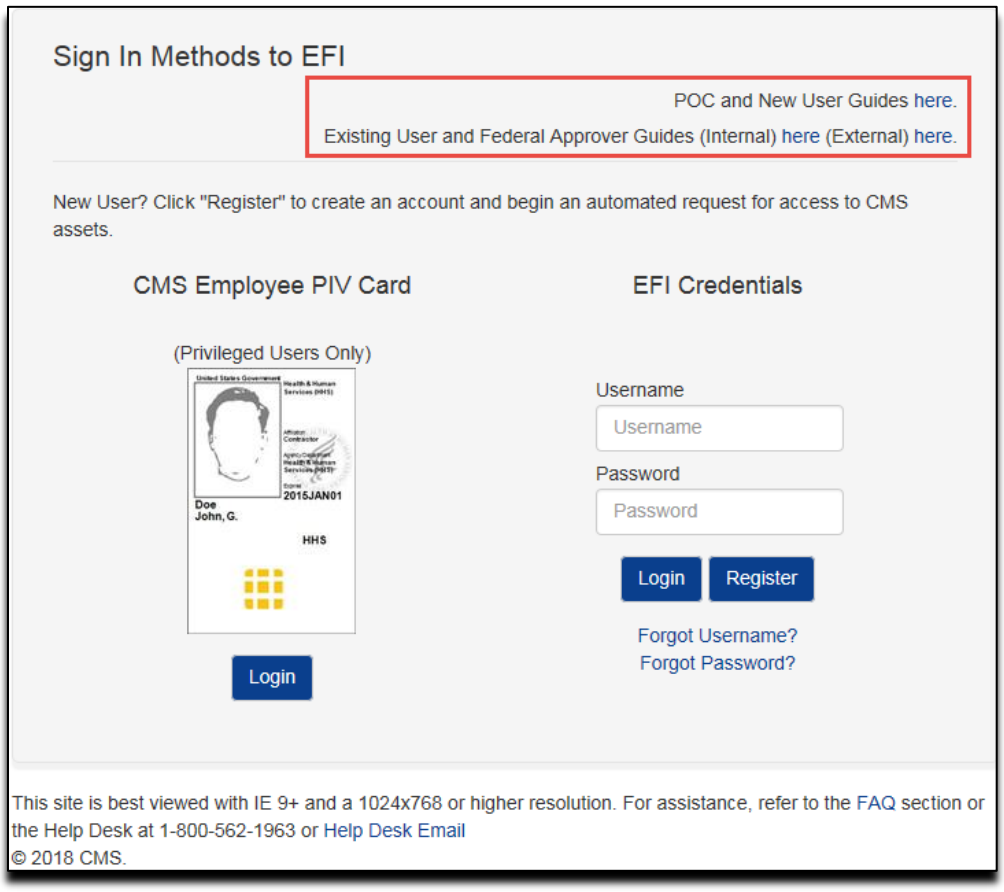


Figure 28: User Guide on Login Screen

This POC Guide is accessible to those individuals who have an EUA account and are on the CMS domain via this internal link:
https://vpnint.cms.local/EUADOCS

This POC Guide is accessible to those individuals who have an EUA account and are not on the CMS domain via this external link:
https://vpnext.cms.hhs.gov/EUADOCS

APPENDIX A: FAQ (FREQUENTLY ASK QUESTIONS)

Please refer to the FAQ in the EFI website for other commons questions

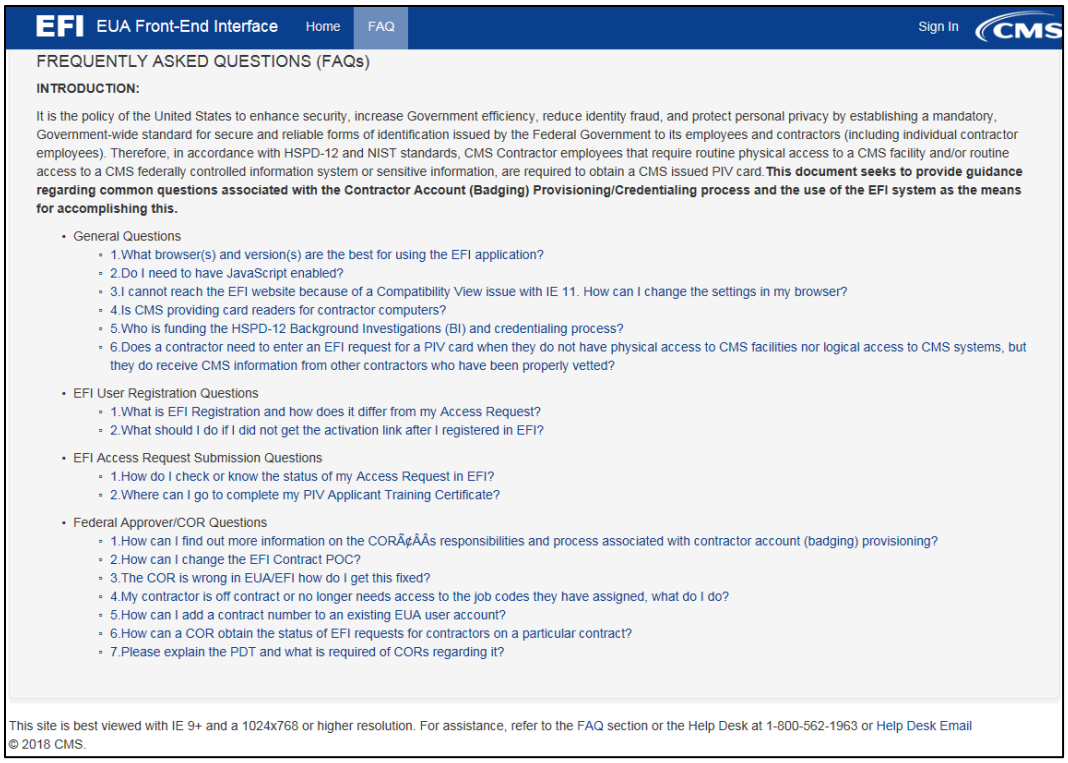


Figure 29: Welcome to the EFI Frequently Asked Questions (FAQ) Page

0.1 I cannot login in EFI it is taking me back to the HOME page

- Please make sure that you are entering your EFI credentials correctly (EFI is CASE SENSITIVE) and that you are NOT using the link from the email notification that you receive from either account activation or password reset.

0.2 I am getting system errors and cannot approve EFI requests

- The EFI website is not compatible with Google Chrome, Mozilla Firefox, Safari and Microsoft Edge browsers(screenshot below). If you are having these issues try opening EFI in Microsoft Internet Explorer version 9 or newer.

Figure 30: Microsoft Edge

0.3 Approval process for contractors

- For a contractor once the request has been submitted, it will be reviewed by the contract Point of Contact (POC) or a user with Approval Authority for that contract **(This must be someone at the contract company)**. After the POC approves the request, the form will be sent to the Federal Approver/Contract Officer Representative (COR) for final review and the user will then receive an email notification.

APPENDIX B: REVISION HISTORY

Date	Version	Description of Changes
12/15/2017	1.3	Updated information for Introduction. Updated information and some screenshots for Approve Access Request, Return Access for Modification, Reject and Delete Access Request, Request Approval Authority, Approve and Deny Approval Authority and Manage Approval Authority.
2/21/2018	1.4	Updated information for Introduction. Updated information and notes for Request POC Approval Authority. Added a note in the Approve and Deny Approval Authority. Added FAQ (Frequently ask questions)
03/16/2018	1.5	Reformatted
06/12/2018	1.6	Updated with current screenshots.
07/18/2018	1.7	Updated with current screenshots and text providing details regarding Reason for Issuance values in the PIV Request column.