



DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services

Office of Technology Solutions

Enterprise User Administration (EUA)

Users Guide

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Version 2.5

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1.0 INTRODUCTION

This guide provides information on the Enterprise User Administration (EUA) system used by the Centers for Medicare & Medicaid Services (CMS) and the CMS Data Center (CMS DC). The guide discusses the role of EUA in User ID and password management, and provides instructions for installation and operation of EUA support products available to the user.

EUA is a system used by CMS to manage enterprise User IDs and passwords. It allows for centralized administration of User IDs on the entire CMS enterprise including the mainframe systems, mid-tier devices such as AIX or Sun systems, network operating systems such as Netware or Windows, and database platforms such as Oracle, Sybase, and MS SQL. The system utilizes online data to automate the approval process for access requests and provides logging and auditing support.

EUA only manages resources resident at the CMS DC and at CMS Web sites. Therefore, it does not control Health and Human Services (HHS) provided resources such as the Integrated Time and Attendance System (ITAS) and Outlook. Users need to manage those User IDs and passwords through mechanisms provided in those environments. EUA also does not manage local IDs created in application tables. It does, however, notify an application maintainer whenever a user has been granted access to the maintainer's application.

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2.0 USER CHANGE REQUESTS

All users may submit change requests by sending an e-mail to the CMS Access Administrator (CAA) responsible for their User IDs. The CAA will enter the request into EUA, where it will be routed to the appropriate approving authorities. Contractors must immediately notify CMS upon termination of any employees who hold CMS User IDs. Users may also submit requests for application access on their own behalf.

Training Video's

There are a series of training video's that can be found on [YouTube](#).

3.0 CMS USER ID CERTIFICATION REQUIREMENTS

CMS requires everyone who has an enterprise User ID to complete an annual certification of their access needs and to take a security Computer Based Training (CBT) course. Users who do not complete these two tasks by their certification due date will have their access rights revoked.

Six weeks prior to the due date, each user receives an e-mail message notifying him/her of the need to certify and complete the CBT. The e-mail contains Web browser links to the EUA application and to the CBT Web pages.

Beginning two weeks before the due date, a daily reminder notice is sent to those users who have not completed the certification requirements. If the users do not perform both certification tasks before the deadline, their access rights are revoked.

Users whose access rights have been revoked due to non-certification must request reinstatement by contacting the CMS Service Desk at 800-562-1963. Reinstatements will be granted for a two-week period. If the user does not complete the certification within the two-week period, the User ID will again be revoked.

NOTE Electronic certifications require approval before the user is considered certified. Please allow some time for this approval process, i.e., do not wait until the day before expiration to submit the certification request.

Off Cycle Certification

CMS employees whose Admin code is changed will need to certify their System Access within two weeks of the change. This requirement only applies to CMS employees and Commissioned Corps employees. Admin code changes can be made by CAAs, or by a change detected in the nightly Human Resources (HR) feed. Only the System Access need be done at that time; the CBT is not required for off cycle certification.

New User Certification

All new users will be required to take the CBT within 72 hours of their account being created. Account creation date, is the date in which the ID was approved connection to the first job code.

4.0 EUA

EUA is a web-based application used to provide users with an interface to the CMS identity management services. The two principal uses of EUA for end users are for the annual user certification of access requirements and password management. Use of EUA is encouraged by CMS, since its capabilities will simplify the User ID management process for users.

Installation of EUA

Since EUA is a Web-based application, no user installation is needed. The only software needed on the user workstation is a Web browser such as Internet Explorer or Firefox. CMS employees have an icon (Figure 1) for EUA on their desktops. Other users can create a desktop icon for EUA.



Figure 1: EUA Logo

Accessing EUA from the Internet

EUA can be accessed from any internet connection by using URL <https://eua.cms.gov>.

To use EUA from the internet:

Accessing EUA from the CMS Network

EUA is accessed by entering the following URL in the Web browser:

[EUA Login](#)

Users then enter their CMS enterprise User ID and password illustrated in Figure 2.



Figure 2: EUA Log On

EUA Home Screen

Upon successful login to EUA, the user is presented with the home screen illustrated in Figure 3.

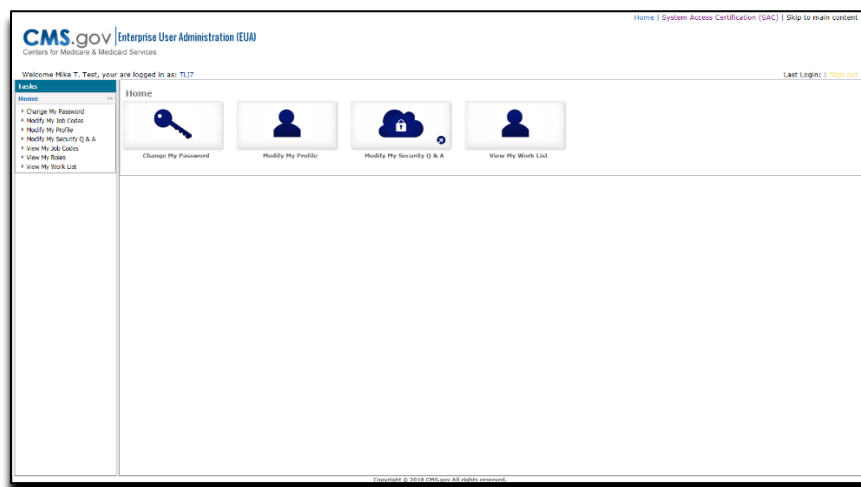


Figure 3: EUA Home Screen

This screen lists the items on which the user has accounts, and the status of those accounts:

1. Task: Here you will click on the task you wish to perform.
2. Home: Quick link buttons for you to click on to perform desired task.

EUA Certification Screens

Once your ID is DUE for system access, log into EUA System Access page. Illustrated in Figure 4. (URL will be provided in the email that prompts you to take the system access, or you can click the link in the upper right hand corner of EUA)

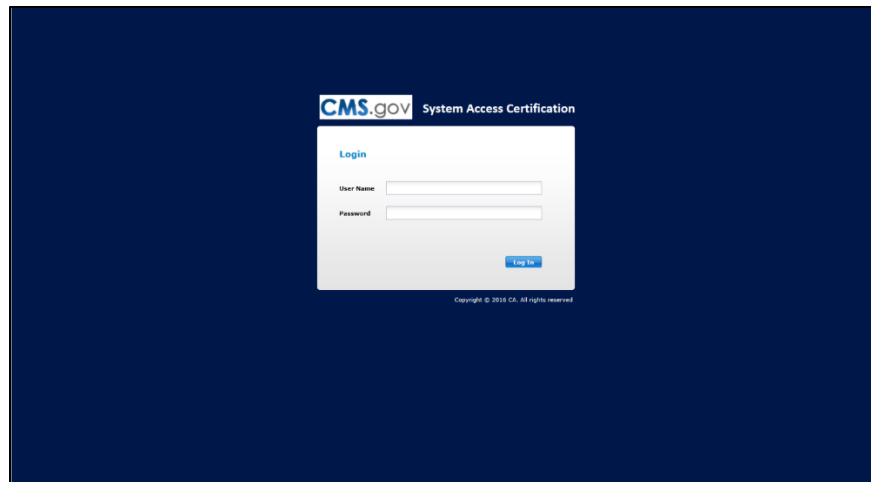


Figure 4: EUA Certification Page

Once logged in you will see that you have a certification to complete, click on Certify to take the system access Figure 5.

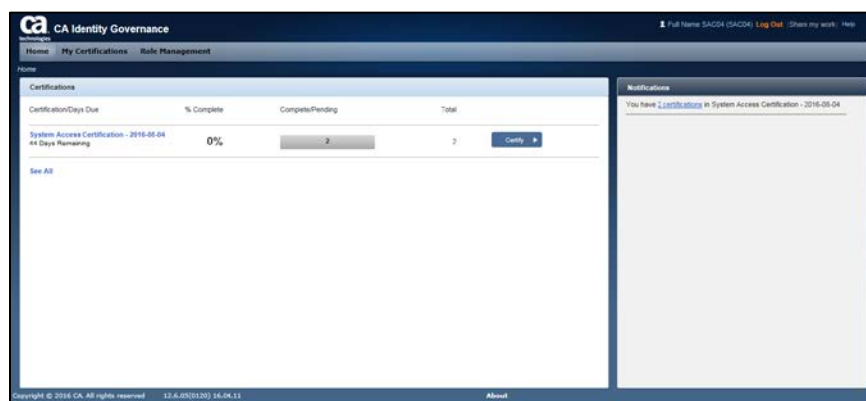


Figure 5: System Access home page

After clicking Certify, you will see your name in the left hand column and the job codes connected to you in the right. To select all the job codes, click the check box beside your name. Illustrated in **Figure 6**.

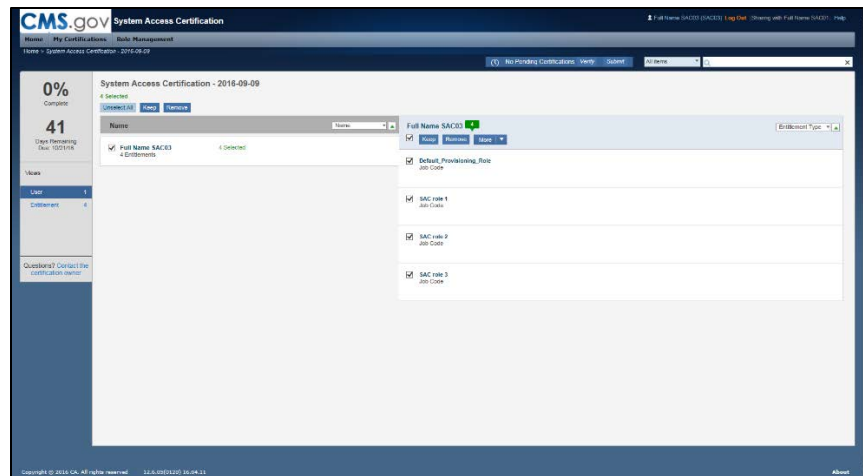


Figure 6: System access screen

Click Keep to certify that you still need access to those job codes or remove for any job codes you no longer need. Once you click keep/remove, you will be taken to the summary page illustrated in Figure 7.

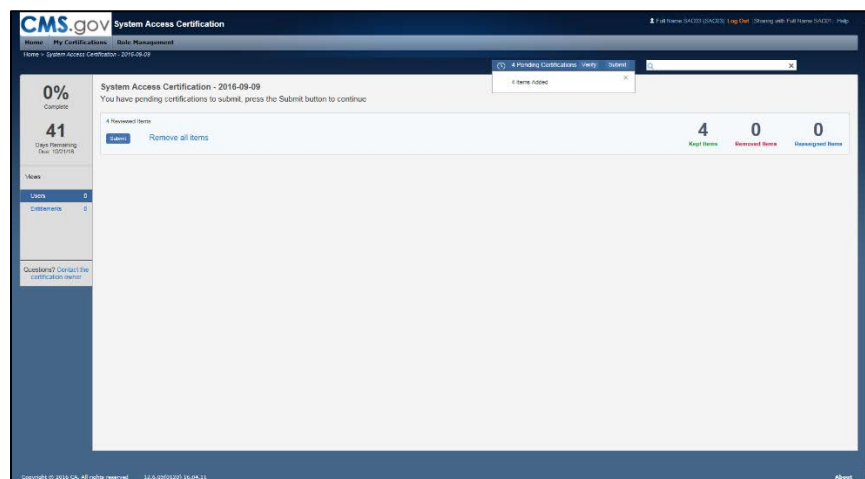


Figure 7: Agree and Decline Buttons

Once you click Submit, you will receive a pop up thanking you for completing the system access Figure 8.

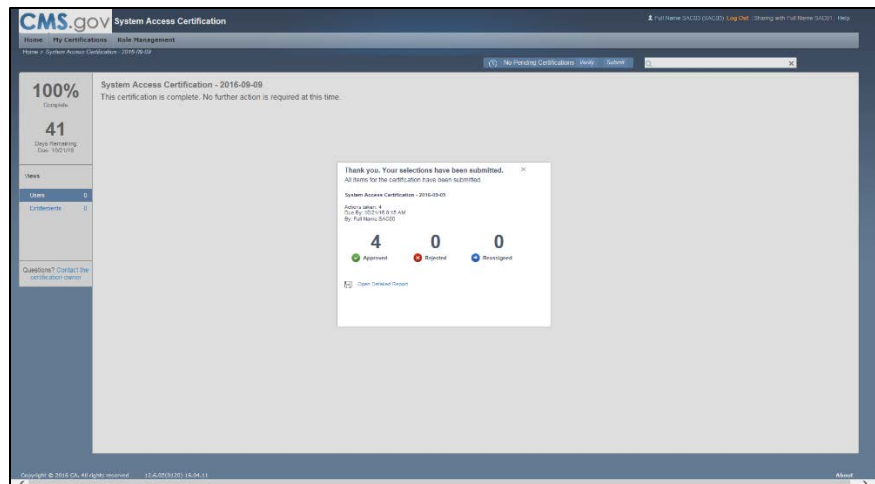


Figure 8: Certification Screen

Click the “x” in the upper right hand corner. You have now completed your portion of the system access and it is now pending approval from your first approver

5.0 MANAGING PASSWORDS

The CMS processing environment is diverse. There are hundreds of applications hosted on a variety of platforms and servers. In an effort to reduce complexity for the users, CMS has instituted Password Propagation. This is not exactly the same as Password Synchronization. In synchronization, the systems ensure that passwords are the same on all accounts. With password propagation, changes are done natively on each platform, and password interception logic on some platforms causes the password change to be propagated to all others. This means that if a user changes the password on a database platform, such as Oracle or MS SQL, that change will not affect other platforms. CMS has ensured that password changes on platforms used for initial login, namely the mainframe, Windows NT and Active Directory, Remote Desktop (MetaFrame), Sun, and AIX, will be propagated to all other environments, including database platforms. As long as users change their passwords on one of these initial entry platforms, or use EUA to change their passwords, all platforms will have the same password.

Using EUA to Manage Passwords

EUA is the preferred tool for managing users' passwords. Selecting the Change my Password link displays the following screen, as illustrated in Figure 9.

The screenshot displays the 'Change My Password' interface within the CMS.gov Enterprise User Administration (EUA) system. The page includes a sidebar with navigation options like 'Tasks', 'Organizations', and 'EUA Info'. The main content area features a 'Global Password Reset' button and a note stating that password changes will be synchronized across all connected platforms. Below this, the 'Password Policy' is detailed, listing requirements such as: cannot include user ID or name, case sensitivity, 60-day change cycle, 50% character change requirement, 24-hour change limit, and specific character mandates (letter, number, lowercase, uppercase, and special character). The form includes fields for 'Password', 'Confirm Password', and five 'Security Questions' with corresponding answer fields. A 'Submit' button is located at the bottom right of the form area.

Figure 9: Password Screen

Type in the new password and confirm. As in Figure 10.

CMS.gov Enterprise User Administration (EUA)
Centers for Medicare & Medicaid Services

Welcome BiRuleTest, Mike - you are logged in as: BTTZ

Home | System Access Certification (SAC) | Sign out

Tasks

- Change My Password
- Check Password Change Status
- Modify My Job Codes
- Modify My Profile
- Modify My Security Q & A
- Out Of Office Assistant
- View IT's I Manage
- View My Role Status
- View My Roles
- View My Submitted Tasks
- View My Work List

Organizations

Job Code Management

EUA Info

Change My Password

Global Password Reset

Note: The submission of this request will synchronize your password across all connected platforms.

Password Policy

- Cannot include your EUA UserID and any part of your name
- Cannot include any word/word portion prohibited by the defined CMS dictionary
- Case Sensitive
- Be changed at least every 60 days
- Password can't contain 50% characters from previous password
- Not be changed more than once per day
- Be different from the previous 24 passwords
- Must include:
 - Must start with a letter
 - At least one number (0-9)
 - At least one lowercase alphabetic character (a-z)
 - At least one Upper Case alphabetic character (A-Z)
 - Confirm Password Match
 - MUST BE EXACTLY 8 characters long**

• Password:

• Confirm Password:

• Security Question 1: If you could open a business, what kind would it be? • Answer to Security Question 1:

• Security Question 2: If you were a car, what kind of car would you be? • Answer to Security Question 2:

• Security Question 3: If you were a tree, what kind of tree would you be? • Answer to Security Question 3:

• Security Question 4: What is the last word in your favorite movie quote? • Answer to Security Question 4:

• Security Question 5: What much did you weight in the last year of High School? • Answer to Security Question 5:

Submit **Cancel**

Figure 10: Password Screen: Entering the new password

Click submit, you will see the Conformation page Figure 11.

CMS.gov Enterprise User Administration (EUA)
Centers for Medicare & Medicaid Services

Welcome Mike T. Test, your are logged in as: TLTZ

Home | System Access Certification (SAC) | Skip to main content

Last Login: | Sign out

Tasks

- Change My Password
- Check Password Change Status
- Modify My Job Codes
- Modify My Profile
- Modify My Security Q & A
- View My Role Status
- View My Roles
- View My Submitted Tasks
- View My Work List

Organizations

Job Code Management

EUA Info

Change My Password

Confirmation: Task completed.

OK

Figure 11: View Status of Password Changes

Click OK and you will be taken back to the EUA home page.

Use of EUA is recommended. Users who cannot use EUA can change their passwords when challenged by the platform and still have the change propagated to all other platforms, as long as the new password meets the CMS password standard. Some platforms may not be able to check the password for reserved words or character sequences. In this situation, the password change may work on the platform, but propagation to all other platforms will fail. The user will receive an e-mail stating that the password change only occurred on the local platform, and that propagation failed.

Setting up Authentication Questions in EUA

EUA can also be used by users who have forgotten their passwords, or who have been revoked by mistyping their passwords. In order to utilize this feature, users need to set up challenges that can be used to authenticate them prior to password reset. This is done by selecting the “Modify My Security Qn A” button, as illustrated in Figure 12.



Figure 12: Challenges Tab

This brings up the “Security QnA” screen, as illustrated in Figure 13.

CMS.gov Enterprise User Administration (EUA)
Centers for Medicare & Medicaid Services

Welcome Mike T. Test, you are logged in as: TL177 [Last Login](#) | [Sign out](#)

Home | [System Access Certification \(SAC\)](#) | [Skip to main content](#)

Home

- Change My Password
- Modify My ID Code
- Modify My Profile
- Modify My Security Q & A
- View My ID Code
- View My Roles
- View My Task List

Required

Mike T. Test (TL177)

In order to support self-service password reset, you must choose a unique question for each of the 5 options and your answers cannot be the same.

| Security Question | Answer |
|--|--------------|
| Security Question 1: Who is your favorite Super Hero? | Mighty Mouse |
| Security Question 2: What was the first musical instrument you played? | Triangle |
| Security Question 3: What much did you weight in the last year of High School? | 125 |
| Security Question 4: If you were a tree, what kind of tree would you be? | Oak |
| Security Question 5: If you could open a business, what kind would it be? | Pizza King |

[Submit](#) [Cancel](#)

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Figure 13: Edit Challenge Screen

To set up the answer, the user types and retypes the response and selects “[Submit](#).” Responses must be provided for all questions. The same response cannot be used for more than one challenge.

Logging on to EUA without a Password

After the questions and responses have been set up, the user can access EUA without a password. This is done by selecting “[Forgot Password?](#)” in the initial EUA logon screen, as illustrated in Figure 14.

CMS.gov Enterprise User Administration (EUA)
Centers for Medicare & Medicaid Services

Welcome to Enterprise User Administration (EUA)

Sign in

Username:

Password: [Forgot Password?](#)

[Log In](#)

OR

Don't have an account: [Register Now](#)

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Figure 14: Log On Without Your Password Screen

The user will be asked to provide the user ID, as illustrated in Figure 15.

Figure 15: User ID Screen

After you enter your User ID click OK and the next screen will show your chosen questions, answer those correctly and you will be able to enter a new password Figure 16.

Figure 16: Password Tab

Upon completion of the password change, all user accounts are restored with the new password, and the password is valid for 60 days.

Inactivity Revocation

Users who have not changed their passwords for 90 days will have their User ID revoked. Since CMS' password policy requires a password change every 60 days, this means that some users can be revoked after 60 days of inactivity in EUA (those who used the system for 60 days after a password change and then stopped using it). On average, users will be revoked after 90 days of inactivity.

These User IDs will remain in a revoked state until the user contacts their CAA or the CMS Service Desk and requests they be unlocked. There is no limit to the number of times a User ID can be unlocked for inactivity. However, owners of CMS User IDs must perform annual certification for the User ID. If the User ID is not certified by the due date, it will be revoked, and then deleted 30 days later.

Certifying a CMS User ID does not exempt it from revocation for inactivity; conversely, inactive User IDs are not deleted unless they are not certified each year.

This policy allows infrequent and Internet-only users to retain their User IDs; it also enables purging of User IDs that no longer have a need to access CMS resources.

6.0 MANAGING ADDITIONAL ACCESS

Job Code Terminology

EUA job codes are used to provision access to applications or other system resources. Various EUA documentation and the EUA support software will also refer to job codes as Profiles or Entitlements. The complete list of job codes can be found: [Job Code List](#) VPN job codes are further detailed at:

Internal users – [EUA Job Codes Definition Downloads - Internal Users](#)

External users– [EUA Job Codes Definition Downloads - External Users](#)

Connect Additional Access

Connect Additional Access is used when an employee or contractor has an active CMS User ID and additional access is required. You will need to have your CMS User ID, typically a four or seven-character alphanumeric ID, and the access you require. CMS access is defined through Job Codes.

NOTE: For Mainframe HLQ access, the Job Code is always 'HLQ_ XXX', Where 'XXX' is the three character application. Only one HLQ can be requested at a time.

1. Sign on to EUA
2. Click Modify My Job Codes (Figure 17)

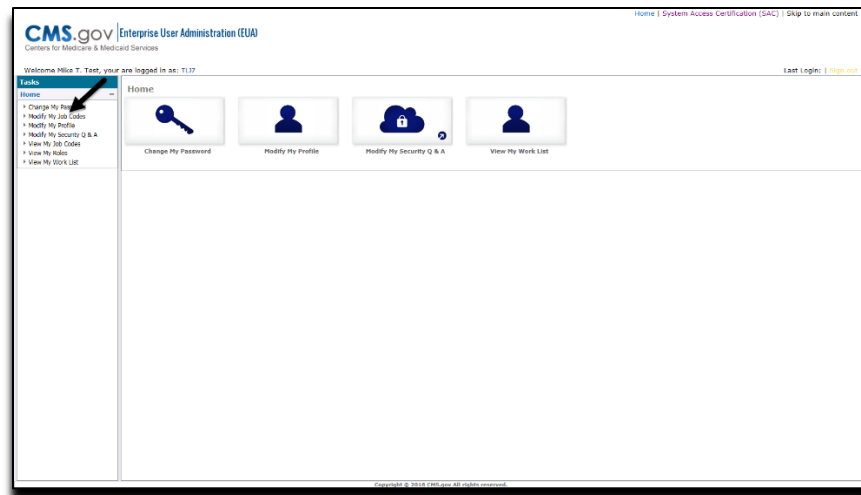


Figure 17: EUA

3. Figure 18 is displayed. This screen will show the job codes you are connected to. To request to be connected to more job codes, click Add a Job Code.

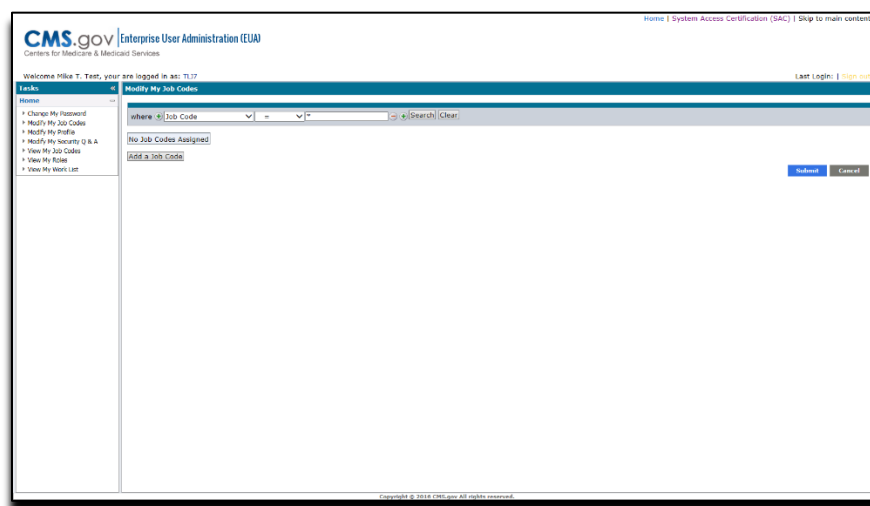


Figure 18: EUA Modify Job Code Task Screen

4. This will bring up the job code search:
 - a. You can search by using the job code name, the description or the business owner.
 - b. Once you find the job code(s) you would like to request access to, click the check box on the left of the job code name.

- c. Once you have the job code(s) selected click select (Figure 19)

Note: For HLQs the Justification field should have the specific dataset(s) requested, followed by the type of access, read, alter, update. Separate each dataset with a comma.

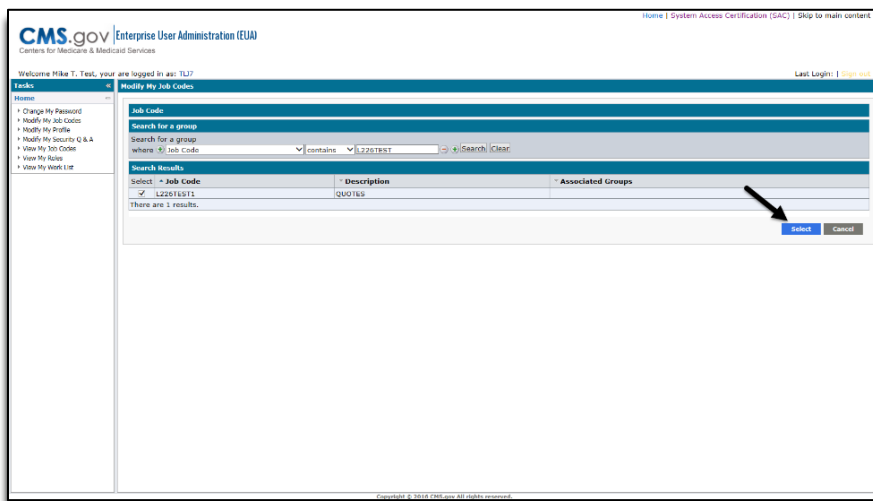


Figure 19: Select Job Code

5. After you select the needed job code(s), you are presented the Modify Job Codes page in which the job code(s) selected on the previous step should be displayed. Click Next. You will now need to enter the justification. Once justification is entered, click finish (Figure 20).

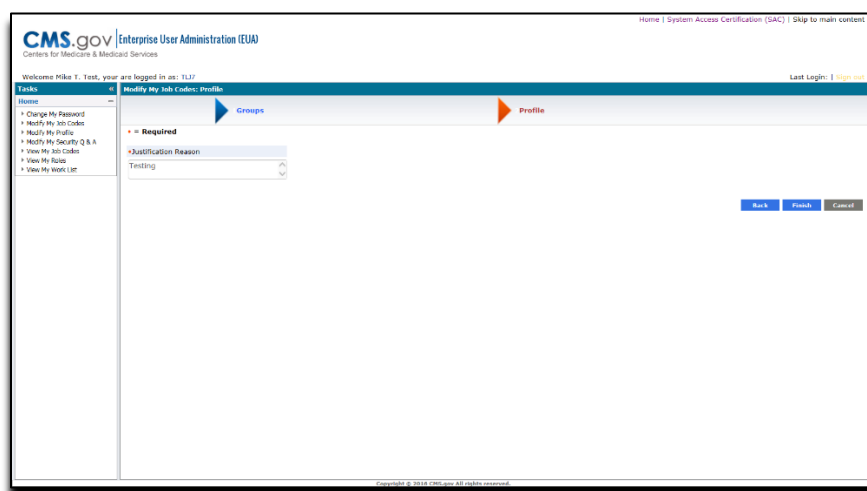


Figure 20: EUA Connect Job Code Justification

6. After the request is submitted, you will see an alert page letting you know that the request is pending approval, you will then click OK and will be taken back to the home screen. (Figure 21)

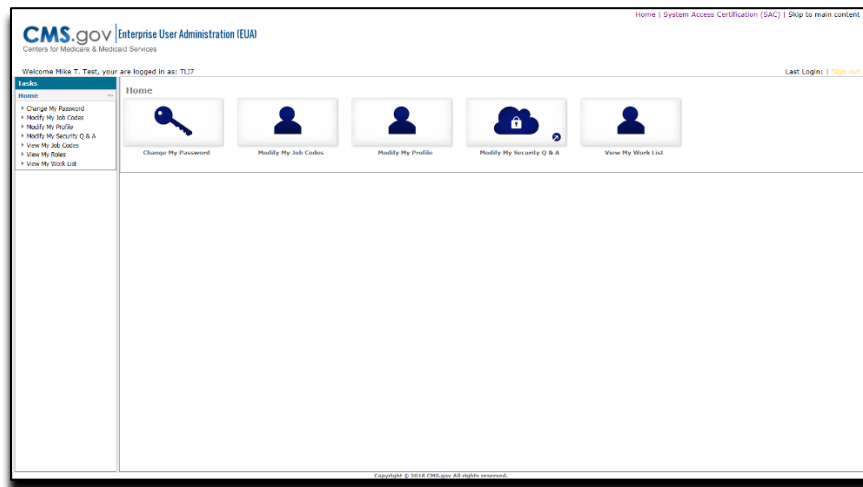


Figure 21: EUA Home screen

7. The request is routed to the designated approver. On approval, the access is granted.

Disconnect Job Code

1. To start the process, the requestor selects the Modify My Job Codes task on the left menu. (Figure 22)

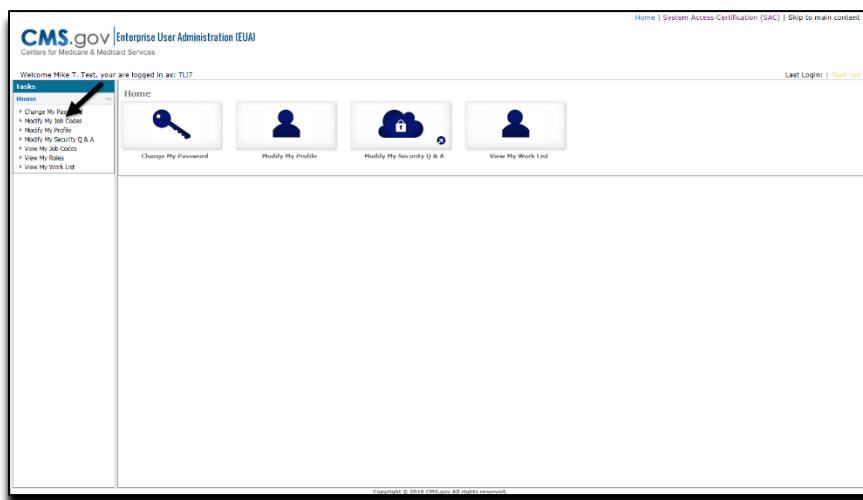


Figure 22: EUA Disconnect Access

You will see a list of job codes that you are connected to (Figure 23).

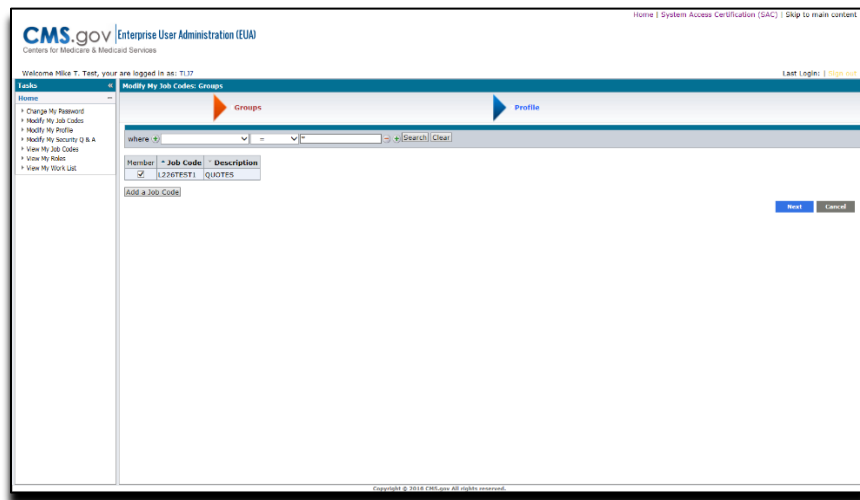


Figure 23: EUA Disconnect Access Job Code Selection

- Click on the check box to remove the check from the job code that you wish to disconnect. Click Next. This will bring up the justification screen. Enter in the justification and then click Finish (Figure 24)

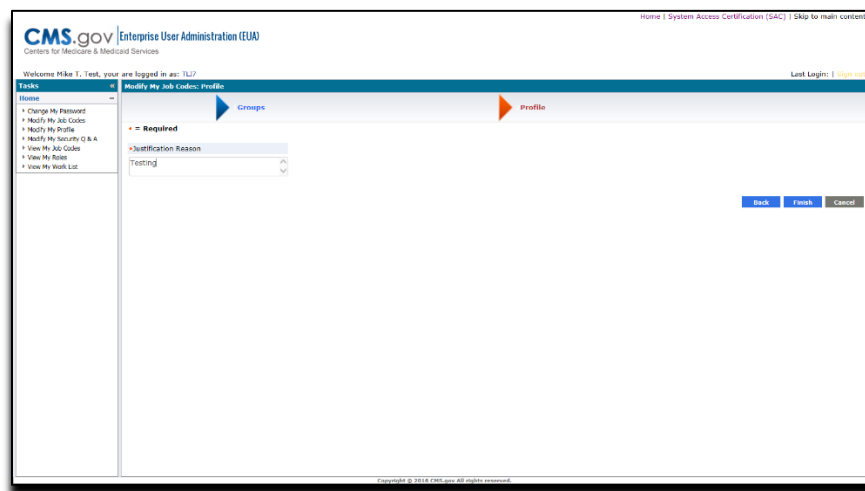


Figure 24: EUA Disconnect Confirmation screen

- Once you click Finish, you will see a page that shows the Task is pending. (Figure 25).
- The request is routed to the designated approver. On approval, the access is removed.

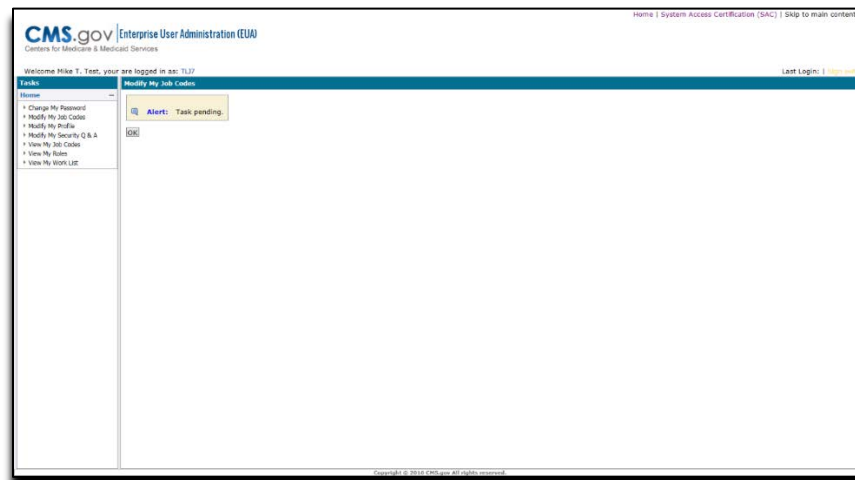


Figure 25: EUA disconnect request

Viewing Job Codes (Entitlements)

1. After logging into EUA click View My Job Codes, if you are connected to job codes they will show here (Figure 26)

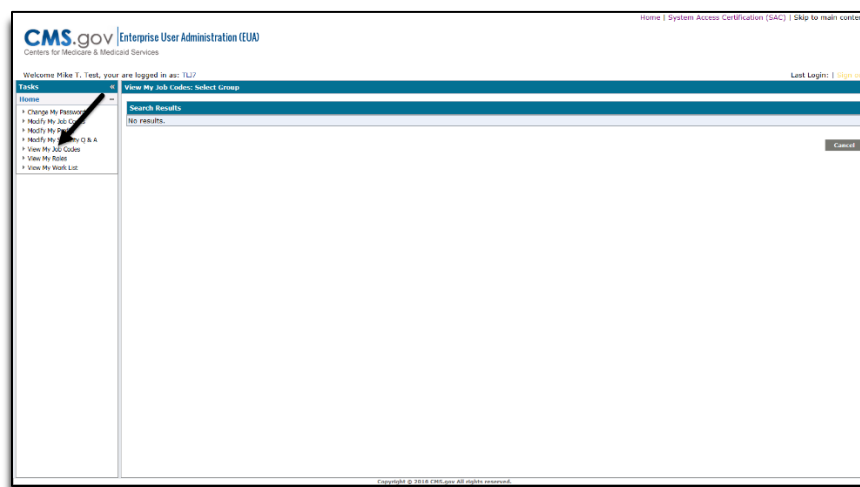


Figure 26: User's Entitlements (Job codes)

7.0 MODIFY MY PROFILE

1. Once you've logged into EUA, click on the Modify My Profile task under Home (Figure 27)

The screenshot shows the 'CMS.gov Enterprise User Administration (EUA)' interface. The sidebar on the left contains a 'Tasks' menu with 'Home' selected. The main content area is titled 'Modify My Profile' and displays user information and editable fields. A black arrow points to the 'Modify My Profile' link in the sidebar.

| Field | Value | Field | Value |
|-----------------------|------------------------|-----------------------|------------|
| Last Login | | User Status | Active |
| Last Successful Login | 01/27/2018 at 14:39:33 | User Category Type | Admin |
| Failed Login Attempts | | DOB | 1982-01-30 |
| User ID | 1137 | Organization | weare |
| User Category | not defined | | |
| Legal First Name | Mike | Preferred First Name | Mike |
| Middle Name | T | Other names used | |
| Legal Last Name | Text | Preferred Last Name | Text |
| Full Name | Mike T. Text | | |
| Work Email | mike.t.miller@cms.gov | Manager | No |
| Work Phone | 410-786-7830 | Work Phone Ext. | |
| Personal Phone | | Personal Mobile | |
| Personal Email | mike.t.miller@cms.gov | | |
| Birth Country | US | Birth Province/State | MD |
| U.S. Citizen | yes | Number of years in US | |
| Birth City | Baltimore | | |

Figure 27: Modify My Profile

Here you will be able to update some of your information that EUA has on file (Preferred Last name, Preferred First name, Other names used, Work phone number, personal phone number, and personal email address)

2. Once you have changed the needed information, click submit.

8.0 INTRODUCTION TO EFI

EUA Front-End Interface (EFI) is a web interface which allows users to request access to the Centers for Medicare & Medicaid Services (CMS) network, application, and facility resources. In order to access the website, the user must first register for an account. EFI then provides the user the ability to fill out an access request form (HHS-745) online to obtain a new CMS ID. **EFI is only supported in IE Explorer browser 9 +.**

This document guides the user through the registration process, login process, username and password management process, how to export the HHS-745 pdf form, and how to request a PIV Card when a user is already registered in EFI and has an existing CMS ID in Enterprise User Administration (EUA).

There are four distinct user categories in the application when going through the PIV request process. Each is described below with some data points needed for each user category.

CMS Employee category is for new employees going through the onboarding process, as well as, CMS Commission Corps joining CMS. Both are referred to as CMS employees. CMS employees interact with the Human Resources (HR) department to determine when they should fill out the access request form as well as what admin code they will be requiring in order to onboard at CMS. In order to complete an Access Request as a CMS Employee, you must know your Admin Code, CMS Region/Facility, and if you are a manager or not.

Contractor users make up the majority of the population at CMS. These contractors come from many different companies and work on different contracts. EFI is able to dynamically search contracts and companies to ensure proper data entry. In order to complete the Access Request form as a contractor, you must know your CMS Region/Facility, Company, Contract Number (if applicable), PIV training documentation (if applicable) for PIV requests only, provided by your onboarding company.

Federal Agency users can fill out the Access Request form similar to many users but in most cases already have a Personal Identity Verification (PIV) credential. In order to complete an Access Request as a Federal Agency user, you must know your CMS Region/Facility, Federal Agency you work for, and the User Principal Name (UPN) from your PIV card/Common Access Card (CAC).

Business Partners are a user category that encompasses those that partner with CMS for critical transactions tied to the CMS mission. In order to complete an Access Request as a Business Partner you

must know your CMS Region/Facility and your company specific information such as Plan Number if you are of type HPMS/HICS or Labeler Code(s) if you are a Medicaid Drug Manufacturer.

9.0 THINGS YOU NEED TO KNOW BEFORE REGISTERING

Please log into EUA and go to “[Modify My Profile](#)” to verify your information is correct. It is very important that this information is accurate. You **must** use the primary email address listed in EUA when registering in EFI. If you modified your EUA profile, please wait until the next day to continue your registration. If you cannot modify your EUA profile please request to your CAA to update the information for you.

Information your Federal Approver/CMS COR must provide to you:

Category: _____

Type: _____

Region: _____

Full Contract Number: _____

You may also find this how to [video](#) Helpful

STOP!!! If you do not have the above information do not proceed!!!

Note: If you previously had a EUA ID but it was deleted, please verify that your previous EUA ID has been properly deleted and not labeled with a status of REVOKE since this will cause issues when applying for a new EUA ID.

10.0 REGISTER IN EFI

The EFI registration process distinguishes between those users who are Existing Users and currently have a CMS USERID (registered in EUA) and those who are New Users and do not. Your first question asks, “Do you already have a CMS USERID?”

If the answer is “Yes”, you will need to enter your CMS USERID and SSN. After clicking the “Sign Up” button you are then required to enter a desired EFI username and EFI password. Additionally, you may change your email address if the EUA email address is not current. You then enter your email address a second time. After clicking the “Sign Up” button, you will be returned to the login screen and be able to login to EFI without any waiting as your account is immediately activated.

If the answer is “No” you should open the [EFI New User Guide](#) and follow those instructions for registering with EFI as a New User.

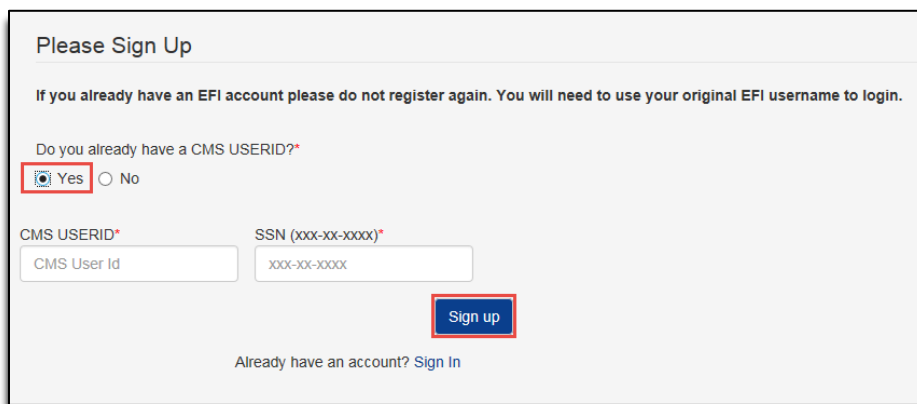
Note: Your EUA CMS ID login is separate from the new EFI account that you will create when you register in EFI. Both systems use a separate login authentication.

1. Click **Register** from the EFI login page ([EUA - EFI Login Page](#)).

The screenshot shows the 'Sign In Methods to EFI' page. At the top, there are links for 'POC and New User Guides here.' and 'Existing User and Federal Approver Guides (Internal) here (External) here.' Below this, a message asks if the user is a new user and instructs them to click the 'Register' button. The page is divided into two main sections: 'CMS Employee PIV Card' and 'EFI Credentials'. The 'CMS Employee PIV Card' section, labeled '(Privileged Users Only)', shows a sample PIV card for 'Doe John, G.' with an expiration date of '2015 JAN 01' and a 'Login' button below it. The 'EFI Credentials' section contains input fields for 'Username' and 'Password', followed by 'Login' and 'Register' buttons. The 'Register' button is highlighted with a red rectangle. Below the buttons are links for 'Forgot Username?' and 'Forgot Password?'.

Figure 28: Register with EFI

1. Select the **Yes** radio button to answer the question, “Do you already have a CMS USERID?” Enter your CMS USERID and SSN, then click the **Sign up** button.



Please Sign Up

If you already have an EFI account please do not register again. You will need to use your original EFI username to login.

Do you already have a CMS USERID?*

☒ Yes ☐ No

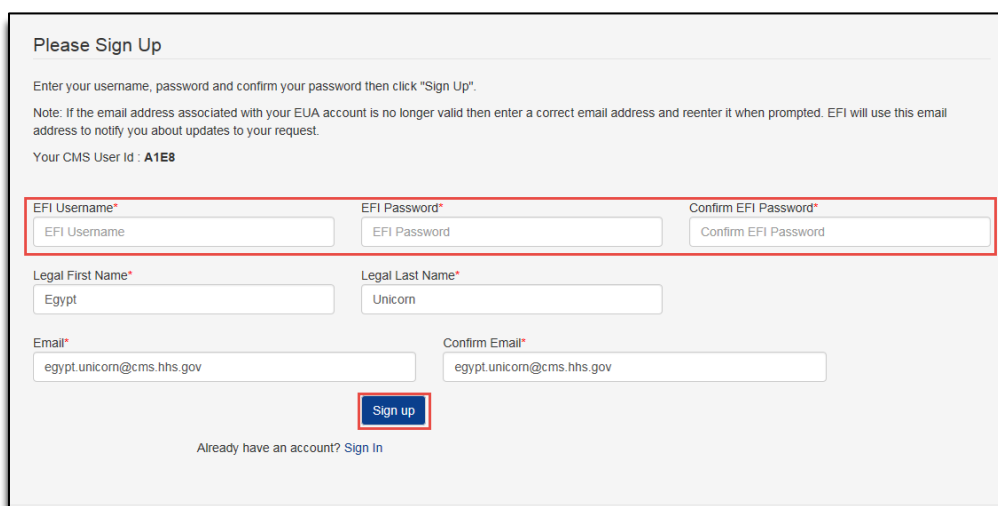
CMS USERID* SSN (xxx-xx-xxxx)*

Sign up

Already have an account? [Sign In](#)

Figure 29: Register – Provide Answer to “Do you have a CMS UserID”

2. If you are registered with EUA under the CMS USERID and SSN that you provided, EFI pre-populates your Legal First and Last Name and Email Address from your EUA account. You now need to enter an EFI Username and EFI Password to complete registration with EFI. If the email address provided from your EUA account is incorrect, you may now change it in order to receive notifications from EFI about your request.
3. After you finish filling in all the required fields, click the **Sign up** button.



Please Sign Up

Enter your username, password and confirm your password then click “Sign Up”.

Note: If the email address associated with your EUA account is no longer valid then enter a correct email address and reenter it when prompted. EFI will use this email address to notify you about updates to your request.

Your CMS User Id : **A1E8**

EFI Username* EFI Password* Confirm EFI Password*

Legal First Name* Legal Last Name*

Email* Confirm Email*

Sign up

Already have an account? [Sign In](#)

Figure 30: Register – Complete Sign Up form with CMS UserID

Figure 31: Register – Confirmation of successful registration w/CMS UserID

4. You will be directed to Login page with a confirmation that you successfully have registered and that your account is active and to please sign in to create a new PIV request.
5. If your CMS USERID and SSN are not recognized by EUA, EFI will provide a notification that you should verify your CMS USERID and SSN or contact the Help Desk for assistance using the provided link.

Figure 32: Register – Error Notification to Confirm EUA CMS USERID and SSN

6. If EFI determines that you already have an account, EFI will provide a notification with links for you to recover your EFI Username and Password.

The screenshot displays a web form for registration. At the top, a red banner contains the text: "You already have an account in EFI. Please login by using your EFI credentials or recover your login information using the Forgot Username/ Forgot Password links below." Below this banner, the text "Please Sign Up" is displayed. A message states: "If you already have an EFI account please do not register again. You will need to use your original EFI username to login." The form includes a question "Do you already have a CMS USERID?" with radio buttons for "Yes" (selected) and "No". Below this, there are two input fields: "CMS USERID*" containing the text "gvd6j" and "SSN (xxx-xx-xxxx)*" containing a series of dots. A "Sign up" button is located at the bottom right of the form.

Figure 33: Register – Error Notification to Recover EFI Username and Password

11.0 FORGOT USERNAME

The “Forgot Username” process allows the user to recover their username. The user must provide their first name, last name, and one of three methods to provide the third item of information – CMSID, SSN, or Email. If there is match in the EFI system, an email message containing the user’s username will be sent to the user.

Note: Please be aware that EFI entries are case-sensitive (upper/lower cases) so you will need to enter the information exactly as you did at registration.

Note: In order to use the CMSID method the user also should have a previous EFI account. Users that have an existing EUA ID but they just registered for a new EFI account won’t be able to use the CMSID method.

1 CMSID Method

- a. Click the **Forgot Username?** link from the EFI login page ([EUA - EFI Login Page](#)).
- b. Enter your First Name, Last Name, and select CMSID as the identify verification method.
- c. Enter your CMSID and then click the **Recover Username** button.

Note: Please be aware that the First Name and Last Name will need to be entered exactly as you did during registration otherwise the system won’t find your record.

Note: The user is required to enter a CMS ID (active) from EUA in the field. The user should also have a previous EFI account in order to match the information in the system.

Figure 34: Forgot Username - EFI CMSID identity verification method – Recovery Username page

- d. You will receive an email at the email address you provided containing your EFI Username.



From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, April 17, 2017 2:21 PM
To: Applicant21, EFI <efi.applicant@testing.com>
Subject: EFI User Recovery

Hello EFI Applicant21,

Your EFI username is efi.applicant21

Please log into [EFI](#) to with your username and password.

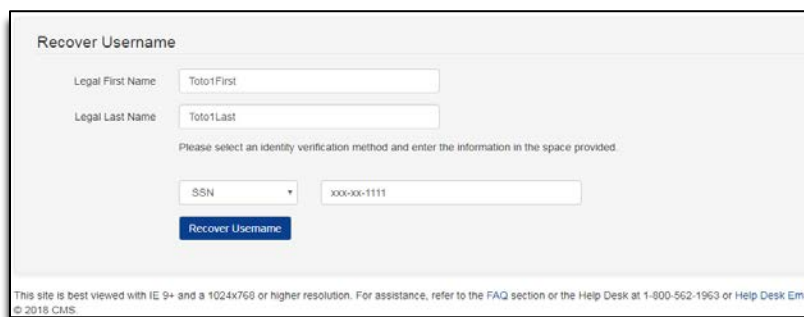
Thank you,
Enterprise User Administration (EUA)

Figure 35: Forgot Username - EFI Username Recovery email - CMSID identity verification method

2 SSN Method

If you select the SSN method, you will need to provide the following information: First Name, Last Name, and your SSN for the fields in the “Recover Username” form and then click the **Recover Username** button. For the SSN field you can enter the SSN number with the following format including dashes (xxx-xx-xxxx) or just the SSN number without dashes (xxxxxxxxxx).

Note: Please be aware that the First Name and Last Name will need to be entered exactly as you did during registration otherwise the system won’t find your record.



Recover Username

Legal First Name

Legal Last Name

Please select an identity verification method and enter the information in the space provided.

SSN

This site is best viewed with IE 9+ and a 1024x768 or higher resolution. For assistance, refer to the FAQ section or the Help Desk at 1-800-562-1963 or Help Desk Email © 2018 CMS.

Figure 36: Forgot Username - EFI SSN identity verification method – Recovery Username page

- a. You will receive an email at the email address you provided containing your EFI Username:

From: eu@cms.hhs.gov [<mailto:eu@cms.hhs.gov>]
Sent: Monday, April 17, 2017 2:21 PM
To: Toto1Last, Toto1First <AE00173@wellpoint.com>
Subject: EFI User Recovery

Hello Toto1First Toto1Last,

Your EFI username is toto1

Please log into [EFI](#) to with your username and password.

Thank you,
Enterprise User Administration (EUA)

Figure 37: Forgot Username - EFI Username Recovery email - SSN identity verification method

3 Email Method

If you select the Email method, you will need to provide the following information: First Name, Last Name, and the Email address used during registration and then click the **Recover Username** button.

Note: Please be aware that the First Name and Last Name will need to be entered exactly as you did during registration otherwise the system won't find your record.

Figure 38: Forgot Username - EFI Email identity verification method – Recovery Username page

- a. You will receive an email at the email address you provided containing your EFI Username:

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, January 16, 2018 3:58 PM
To: Doe, Jane <jane.doe@gmail.com>
Subject: New EFI Request Submitted: Bruce Banner

Hello Jane Doe,

Your EFI username is jdoe.

Please log into [EFI](#) with your username and password.

Thank you,
Enterprise User Administration (EUA)

Figure 39: *Forgot Username - EFI Username Recovery email - Email identity verification method*

12.0 FORGOT PASSWORD

The “Forgot Password” process allows the user to reset their password. The user must provide their EFI username and the email address used during registration. If there is match in the EFI system, an email message containing a link to reset the password will be sent to the user.

Note: Please be aware that EFI is case-sensitive (upper/lower cases) so you will need to enter the information exactly as you did at the registration process.

1. Click the **Forgot Password?** Link from the EFI login page ([EUA - EFI Login Page](#)).

Enter your Username and Email address at the “Recover Password” form and then click the **Recover Password** button.

Note: Please be aware that the Username and Email will need to be entered exactly as you did during registration otherwise the system won’t find your record.

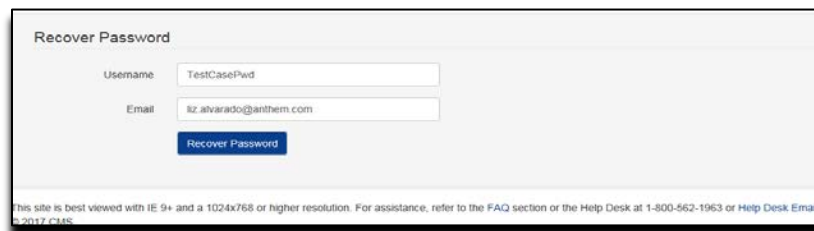
A screenshot of a web form titled "Recover Password". The form has two input fields: "Username" with the text "TestCasePwd" and "Email" with the text "sz.alvarado@anthem.com". Below the fields is a blue button labeled "Recover Password". At the bottom of the form, there is a small disclaimer: "This site is best viewed with IE 9+ and a 1024x768 or higher resolution. For assistance, refer to the FAQ section or the Help Desk at 1-800-562-1963 or Help Desk Email: h2017.c3ds".

Figure 40: *Forgot Password – Recover Password page*

2. You will receive an email at the email address you provided containing a link to reset your password:

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, January 16, 2018 3:58 PM
To: Doe, Jane <jane.doe@gmail.com>
Subject: New EFI Request Submitted: Bruce Banner

Hello Jane Doe,

You have requested to reset your EFI account password.

Please select the link below to reset your password:

[Reset Password](#)

Thank you,
Enterprise User Administration (EUA)

Figure 41: *Forgot Password - EFI Password Reset Email*

3. Reference [Reset Password](#) section for steps on resetting your password.

13.0 LOGIN WITH USERNAME/PASSWORD

The “Login with Username/Password” process requires the user to provide their EFI username and password and accept the Department of Health and Human Services (HHS) Warning message. After a successful login, the user will be directed to the EFI Home Page.

Note: Please be aware that EFI is case-sensitive (upper/lower cases) so you will need to enter the information exactly as you did at the registration process.

1. From the EFI login page ([EUA - EFI Login Page](#)) enter your EFI Username and Password under the **EFI Credentials** section and then click the **Login** button.

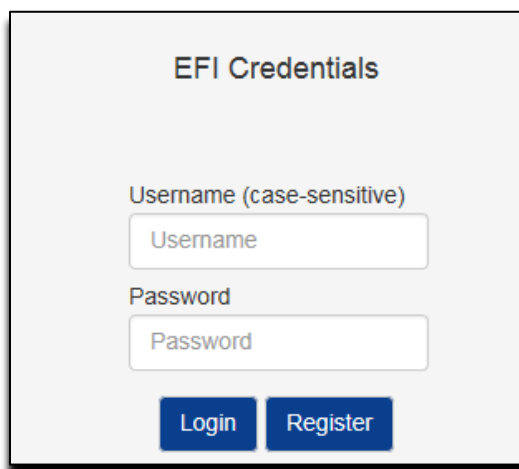
A screenshot of a web form titled "EFI Credentials". It contains two input fields: "Username (case-sensitive)" and "Password". Below the fields are two buttons: "Login" and "Register". The form is set against a light gray background with a thin black border.

Figure 42: Login with Username/Password – EFI Credentials section

2. At the **WARNING** pop-up message, click the **Agree** button once you are ready to continue.
3. A successful login will take you to the EFI Home page which will display “Welcome to the CMS Network, Application, & Building Access Request Application!”

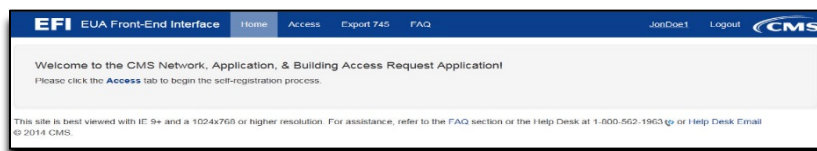


Figure 43: Login with Username/Password – EFI EUA Front-End Interface Home Page

14.0 RESET PASSWORD

The “Reset Password” process allows the user to provide a new password for their account. Once the user completes the [Forgot Password](#) process, they will receive an email message containing a link to initiate the “Reset Password” process. After clicking the “Reset Password” link, the user will be directed to the EFI page where they can enter their username and a new password.

Note: The password must be between 8-24 characters long and must contain at least one uppercase letter, one lowercase letter, and one special character. Please do not use previous 6 passwords.

1. Refer to the [Forgot Password](#) Section of this document for instructions on how to initiate password reset.

Once you receive the EFI Password Reset email, click the **Reset Password** link within the email:

Note: Do not use this link to login to EFI. Please open a new browser and enter the URL manually.



Figure 44: Reset Password - EFI Password Reset Email

2. Complete the “Reset Password” form and then click the **Change Password** button.

A screenshot of a web form titled 'Reset Password'. It contains three input fields: 'Username' with the value 'JonDoe1', 'New Password' with masked characters '*****', and 'Confirm New Password' also with masked characters '*****'. Below the fields is a blue button labeled 'Change Password'.

Figure 45: Reset Password - Reset Password Form

3. Verify the “Password has been successfully changed” message on the EFI login page.
4. You will receive an EFI User Change email confirmation message that your password has been updated.

15.0 EXISTING USER REQUEST / UPDATE PIV CARD

The “Existing User Request/Update PIV” process provides the user the ability to request a PIV card. The user must have an existing CMS User ID issued in EUA and verify that the EUA account information is accurate.

NOTE: The user will register in EFI using their EUA ID and primary email address from their EUA account in order to match the record. Please refer to the [Register](#) section for the steps.

NOTE: At times you may encounter issues with the page not refreshing with new data as expected. This is frequently attributed to Internet Explorer holding the original web page, with all the data, in the cache and not releasing it. Please refer to [How to Clear Cache in Internet Explorer Browser](#) to resolve this issue.

From the EFI login page ([EUA - EFI Login Page](#)) enter your EFI Username/Password (EFI is case – sensitive).

Note: Reference to [Login with Username/Password](#) section for steps on how to Login with Username / Password.

1. Click the Access menu and then click **Existing User Request/Update PIV**.

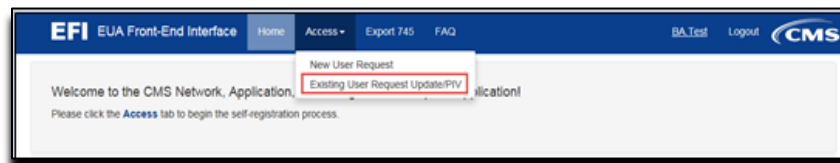


Figure 46: Existing User Request / Update PIV menu

2. If you do not have an existing CMS User ID in EUA, when you click **Existing User Request/Update PIV** option, a message will appear with the following error.

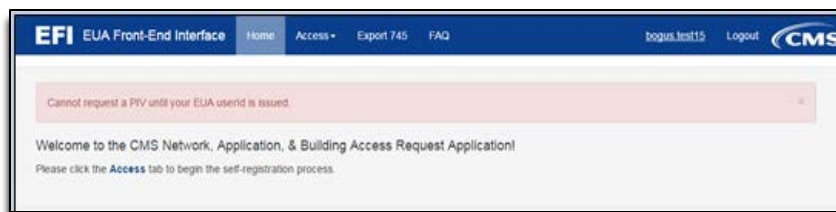


Figure 47: Existing User Request / Update PIV - Error message

3. If you have an existing CMS User ID in EUA then you will be presented with the following information:

“To submit a PIV request you must complete the HHS PIV Applicant Training at: <https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html>.”

4. You will need to select a Reason for Issuance from the drop-down box.

Figure 48: Existing User Request/Update PIV – Select Reason for Issuance

5. If “Other” is selected please specify the reason in the provided text box. You are limited to 69 characters when specifying “Other”.

To submit a PIV request you must complete HHS PIV Applicant Training at <https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html>. Once completed go to the "Additional Details" section and upload the training certificate, re-enter your SSN and Submit the request.

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

Reason for Issuance* **Specify (if Other)***

Other ☒

+ User Details

+ Personal Details

+ Contact Details

+ Additional Details

Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.

[Save Request](#) [Submit Request](#)

Figure 49: Existing User Request/Update PIV – Specify “Other”

6. Please review the Access Request form and fill out any missing data. The information will need to match your EUA Profile in User Details, Personal Details, Contact Details and Additional Details sections.

Note: The information will be provided by your Onboarding Company or Federal Approver/COR.

To expand a section, click the + button to the left of the section header (see [Appendix A](#) for more samples).

7. You will need to go to the “Additional Details” section and upload required documentation based on your reason for issuance of the PIV and whether you are a Contractor or CMS/Federal Agency Employee. A link to the information is provided.
 - Contractors are required to upload their PIV Training Certificate, Resume, and *signed* Declaration for Federal Employment form (OF-306) if submitting a New Application, Expired, or Other request.
 - Contractors are required to upload their PIV Training Certificate and Resume if submitting an Expired request.
 - Contractors are required to upload their PIV Training Certificate for Lost, Stolen, Damaged, or Name Change requests.
 - CMS or Federal Agency Employees have no document upload requirements.

Note: You must manually sign the OF-306 before uploading the document. Digital signatures are not accepted.

Note: The maximum file size of each uploaded document is 4MB.

Note: If you are a contractor please make sure you upload the required information for PIV card. We recommend to save the documents with your last name with file extension. (examples: lastname.jpg or lastname.png or lastname.tiff or lastname.pdf)

The screenshot displays the 'EFI EUA Front-End Interface' with a navigation bar at the top containing 'Home', 'Access', 'Export 745', and 'FAQ'. A user is logged in as 'efi.applcant512'. A blue banner at the top provides instructions on how to submit a PIV request, including a link to the training page. The main section is titled 'Create/Modify Access Request' and includes a warning about session inactivity. Below this, there are expandable sections for 'User Details', 'Personal Details', 'Contact Details', and 'Additional Details'. The 'Additional Details' section is expanded and contains a red box highlighting the 'Required for PIV Issuance' section. This section includes a link to the training page and a reminder about the OF-306 form. Below this, there are four file upload fields: 'Upload PIV Training Certificate', 'Upload Resume', 'Upload Signed Declaration for Federal Employment Form - OF-306', and 'Upload Other Document'. Each field has a 'Browse...' button and a list of supported file types (pdf, docx, jpg, jpeg, tiff, tif, png). At the bottom of the form, there is a 'CMS Region/Facility' dropdown menu and two buttons: 'Save Request' and 'Submit Request'. A final warning at the bottom states: 'Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.'

Figure 50: Existing User Request/Update PIV –Additional Details section where user will upload the Required Documentation

- In order to save your input data and work on it at another time, click the **Save Request** button at the bottom of the form.

9. After you have completed the information request, please review it for accuracy and enter your Social Security Number (SSN) in both required fields under Personal Details section before you click the **Submit Request** button.

Note: The form requires you enter the SSN in the following format “xxx-xx-xxxx.”

The image shows a screenshot of a web form section for entering a Social Security Number (SSN). It contains two input fields. The first field is labeled "SSN (xxx-xx-xxxx)*" and contains a series of ten dots, indicating a masked input. The second field is labeled "Confirm (xxx-xx-xxxx)*" and contains the text "xxx-xx-xxxx", likely as a placeholder or a pre-filled value for confirmation.

Figure 51: Existing User Request/Update PIV – SSN field

If you receive, **“Form not saved. Please correct errors and try again”** message, you will need to correct any input errors from the sections that has a red mark and then go to Personal Details section to re-enter your SSN in both required fields before you click the **Submit Request** button again in order to submit your Access Request.

Note: If you already entered your SSN number in both fields under Personal Details and you are ready to submit your request then click “Submit”. Please do not click the Save Request button because this will remove the SSN from the second field under the Personal Details section.

10. In order to see the errors just click the + button to the left of each of the section header to correct them.

Form not saved. Please correct errors and try again.

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the "Save Request" button at the bottom of the screen. After minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.

User Details

Category*
Select

Request Justification
Justification

Personal Details

Contact Details

Additional Details

Save Request Submit Request

Figure 52: Existing User Request/Update PIV – Form not saved, Please correct errors

- Once you have verified that all the information in each of the sections is correct then, continue with the submission of your request by clicking the + button to the left of the Personal Details section header to re-enter your SSN and then click the **Submit Request** button. A pop-up to sign your HHS-745 form will show. Once you have finished signing, click the **Confirm and Submit Signature** button to continue.

Create Signature

I hereby authorize the release of information in this application to appropriate Federal agencies for the purposes of processing this application and verifying my identity. I also acknowledge that if I knowingly provide or assist in the provision of false information or non-verifiable information, and/or I purposely omit information, it could result in loss of access to HHS facilities and IT systems and in disciplinary action including removal from Federal service or a Federal contract, and I may be subject to prosecution under applicable Federal criminal and civil statutes.

bogus test15

To sign, move the mouse pointer into the "box" and click and hold down the right mouse button. Releasing the right mouse button stops writing.

Figure 53: Existing User Request/Update PIV – Confirm and Submit Signature

At the “Confirmation of Submission” pop-up, click the **Confirm and Submit** button once you are ready to continue. Otherwise, click the **Cancel** button if you want to go back to your application request.

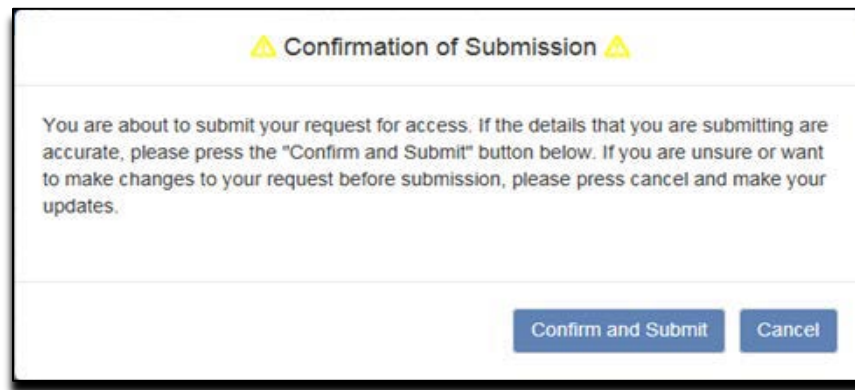


Figure 54: Existing User Request/Update PIV – Confirmation of Submission

12. You will be directed to the Status page showing a summary of your input and the status of your request.

Note: If you need to know the status of your request, first login to EFI (refer to [Login with Username/Password](#) section for steps on how to Login with Username/Password) click Access, and then click on the New User Request Menu. The request status is provided at the top of the request form. If you have further questions regarding your request, please contact your Federal Approver/COR or your point of contact from your onboarding Company.

| | |
|---|--------------------------|
| Status | EFI Pending POC Approval |
| Additional Information | |
| Company: ENTERPRISE SERVICES LLC | |
| Contract Company: ENTERPRISE SERVICES LLC | |
| Contract Number: HHSN-316-2012-00026W:HHSM-500-2017-00007U: | |
| Contract Address: | |
| 13600 EDS Dr A3S-B53 | |
| A3S-B53 | |
| Herndon, VA null | |
| Desired EUA Username: SBWILEY | |
| CMS Region: CO (CENTRAL) Central Office | |
| Access Document(s): | |
| Training Certificate: PIV Certificate - Signed.pdf | |
| Point of Contact (POC): mary-alice.tompkins@dxc.com | |
| Logical Sensitivity: Escort Only | |
| Risk Level: Low | |

Figure 55: Existing User Request / Update PIV – Status

16.0 ACCESS REQUEST RETURN FOR MODIFICATION

The “Access Request Return for Modification” process provides the general steps on how the user will need to review the specific section(s) in the online form, to correct any errors and then resubmit the request for approval. The user must verify each of the marked sections in red and make all the necessary corrections, based on the selected role, before submitting the request.

For a contractor, once the user re-submits the request it will be reviewed by the contract Point of Contact (POC) or a user with Approval Authority for that contract. After the POC approves the request, the form will be reviewed by the Federal Approver/Contract Officer Representative (COR) and the user will then receive an email notification.

For all other users (CMS Employee, Federal Agency, and Business Partner), once the request is submitted it will be reviewed by the Federal Approver/COR and the user will then receive an email notification.

Note: If the contract does not have a POC or Approval Authority assigned then the request will be reviewed by the Federal Approver/COR and the user will then receive an email notification.

Note: Please be aware that only you can see the reason for the Return for Modification in your application. Please contact your Federal Approver/COR with any questions.

1. From the EFI login page ([EUA - EFI Login Page](#)) enter your EFI Username/Password (EFI is case – sensitive).

Note: Reference to [Login with Username/Password](#) section for steps on how to Login with Username / Password.

2. Click the **Access** tab from the EFI Home page or from the EFI top menu **Access > New User Request**

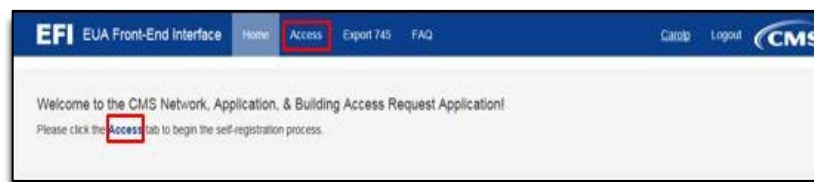


Figure 56: Access Request Return for Modification - Access Tab

Please review the form and correct any errors in the sections marked in red for User Details, Personal Details, Contact Details, Additional Details.

Note: The information will be provided by your Onboarding Company or CMS COR.

3. To expand a section in order to review and correct the error (s) please click the + button to the left of the section header (see [Appendix A](#) for mores samples).

Your Access Request has been Returned for Modification. Please correct any errors and resubmit the request.

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the "Save Request" button at the bottom of the screen. After 360 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

User Details

Category* Contractor Type* MAC

Request Justification
for validation testing

Personal Details

Contact Details

Additional Details

Save Request Submit Request

Figure 57: Access Request Return for Modification – Expand Error

4. Once you have updated the marked section(s) with the correct information, please review it for accuracy and enter your Social Security Number (SSN) in both required fields under Personal Details section before you click the **Submit Request** button.

Note: If you already entered your SSN number in both fields under Personal Details and you are ready to submit your request then click "Submit". Please do not click the Save Request button because this will remove the SSN from the second field under the Personal Details section.

5. Create your signature then **Confirm and Submit** the request.

6. You will be directed to the Status page showing the result of your submission and the status of your request.

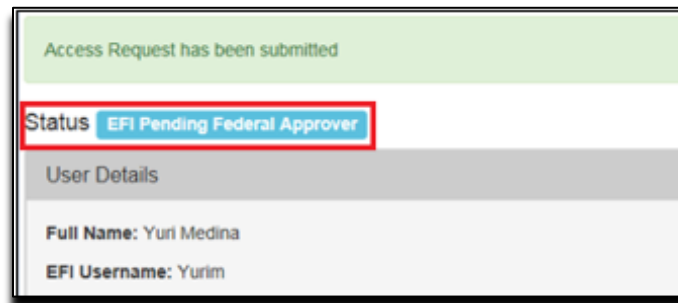
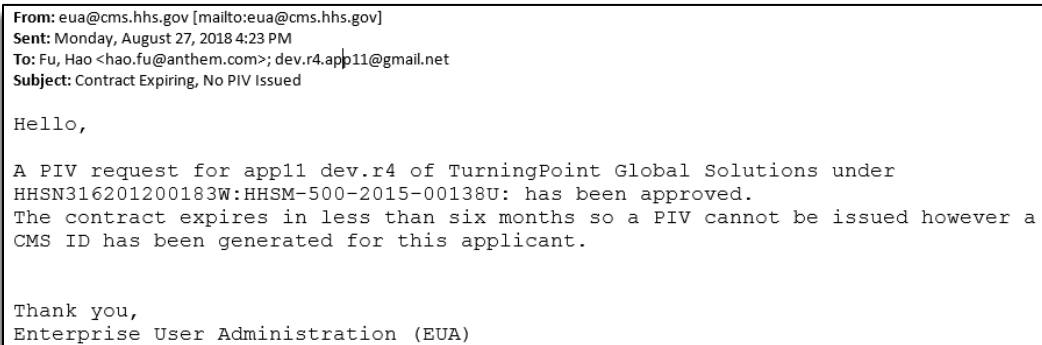


Figure 58: Access Request Return for Modification – Status for CMS Employee, Federal Agency & Contractor roles

16.1 EXPIRING CONTRACT NOTIFICATION

EFI will send a notification to you, the Applicant, and to your Approver when an approval was granted to an Access Request where the contract expires within six months.

The image is a screenshot of an email notification. It has a white background with a thin black border. The email header is in bold. The body of the email contains a greeting, a paragraph of information about a PIV request and contract expiration, and a closing signature.

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, August 27, 2018 4:23 PM
To: Fu, Hao <hao.fu@anthem.com>; dev.r4.app11@gmail.net
Subject: Contract Expiring, No PIV Issued

Hello,

A PIV request for app11 dev.r4 of TurningPoint Global Solutions under HHSN316201200183W:HHSM-500-2015-00138U: has been approved. The contract expires in less than six months so a PIV cannot be issued however a CMS ID has been generated for this applicant.

Thank you,
Enterprise User Administration (EUA)

Figure 59: Email Notifying Expiring Contract

Please contact your CMS COR / Federal Approver to resolve this in EFI using the EUA EFI Federal Approvers guide.

APPENDIX A: SNAPSHOTS OF THE INFORMATION ASKED IN EACH SECTION OF THE ACCESS REQUEST FORM

The “Additional Details” section will display the required information according to the Category (CMS Employee, Contractor, and Federal Agency) and User Type (showing a few examples).

The screenshot shows the 'Create/Modify Access Request' form. At the top, there is a title 'Create/Modify Access Request' and a disclaimer: '* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the "Save Request" button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.' Below this is a 'Reason for Issuance*' dropdown menu with 'Select' as the current value. The 'User Details' section is expanded, showing 'Category*' as 'Contractor' and 'Type*' as 'IT Development and Support Contractors'. There is a 'Request Justification' text area with 'Justification' as a placeholder. Below the 'User Details' section are three collapsed sections: 'Personal Details', 'Contact Details', and 'Additional Details'. At the bottom, there is a warning: 'Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.' and two buttons: 'Save Request' and 'Submit Request'.

Figure 60: User Details section

This screenshot shows the 'Create/Modify Access Request' form with the 'User Details' section expanded for a 'CMS Employee'. The 'Category*' is set to 'CMS Employee' and 'Type*' is set to 'Select'. An 'Entrance on Duty' field is visible with a calendar icon and the text 'mm/dd/yyyy'. The 'Request Justification' text area contains the placeholder 'Justification'. The same disclaimer, collapsed sections, and bottom buttons ('Save Request', 'Submit Request') are present as in Figure 60.

Figure 61: User Details section – CMS Employee

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

Reason for Issuance*
 Select

User Details

Personal Details

Legal First Name*
 devr4

Middle Name
 Middle Name

Legal Last Name*
 applicant8

Date of Birth*
 05/09/1982

Other Names Used
 Other Names Used

U.S. Citizen?*
☒ Yes ☐ No

SSN (xxx-xx-xxxx)*

Confirm (xxx-xx-xxxx)*
 xxx-xx-xxxx

Birth Country*
 United States of America

Birth City*
 Indianapolis

Birth State*
 Indiana

Company/Organization*
 NGS

Position/Title*
 IT

Contact Details

Additional Details

Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.

Figure 62: Personal details section

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

Reason for Issuance*
 Select

User Details

Personal Details

Legal First Name*
 devr4

Middle Name
 Middle Name

Legal Last Name*
 applicant8

Date of Birth*
 05/09/1982

Other Names Used
 Other Names Used

SSN (xxx-xx-xxxx)*

Confirm (xxx-xx-xxxx)*
 xxx-xx-xxxx

Birth Country*
 United States of America

Birth City*
 Indianapolis

Birth State*
 Indiana

Company/Organization
 NGS

Position/Title
 IT

Contact Details

Additional Details

Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.

Figure 63: Personal Details section – CMS Employees

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

Reason for Issuance*

User Details

Personal Details

Contact Details

Personal Phone # Work Phone #*

Work Address Line 1 (Where you perform work from each day)*

Address Line 2

City* State* Zip code*

Additional Details

Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.

Figure 64: Contact Details section

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

Reason for Issuance*

User Details

Personal Details

Contact Details !

Additional Details

Upload PIV Training Certificate
(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document
[EFIRequirementsRelease3.docx](#)

Upload Resume
(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

Upload Signed Declaration for Federal Employment Form - OF-306
(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

Upload Other Document
(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

Admin Code* Are you a Manager?*
☒ Yes ☐ No

CMS Region/Facility*

Selected Contract Details

Company: Point of Contact:

Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.

Figure 65: Additional Details section – CMS Employee

Create/Modify Access Request

* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the [FAQ page](#).

Reason for Issuance*

Renewal

User Details

Personal Details

Contact Details

Additional Details

Upload PIV Training Certificate

Browse...

(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

EFIRequirementsRelease3.docx

Upload Resume

Browse...

(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

Upload Signed Declaration for
Federal Employment Form - OF-306

Browse...

(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

Upload Other Document

Browse...

(File types: pdf, docx, jpg, jpeg, tiff, tif, png)

Current Document

Admin Code

Admin Code

CMS Region/Facility*

Select

Inter-Agency Agreement Number

Inter-Agency Number

Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.

Save Request

Submit Request

Figure 66: Additional Details section – Federal Agency Employees

APPENDIX B: FAQ (FREQUENTLY ASK QUESTIONS)

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

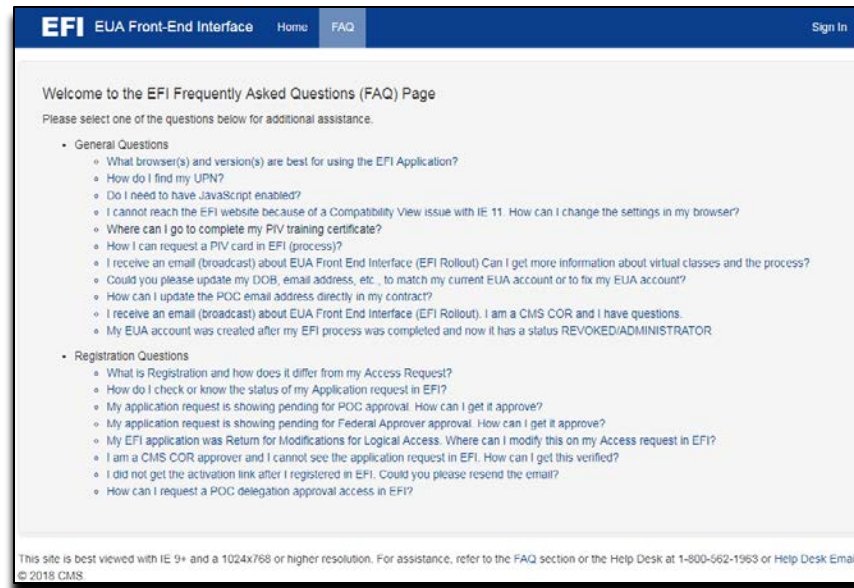


Figure 67: Welcome to the EFI Frequently Asked Questions (FAQ) Page

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 PIV Applicant training information

- Each contractor employee who requires a CMS PIV card shall complete the HHS PIV Applicant Training, which is found at <https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html>. The contractor employee needs to complete the training and submit the PIV Applicant training certificate after completed the HHS-745 form properly.

0.3 I am getting system errors and my EFI request cannot be submitted and stay in a loop and freezes

- EFI website is not compliant to work in Google Chrome, Mozilla Firefox, Safari and Microsoft Explorer Edge (screenshot below).



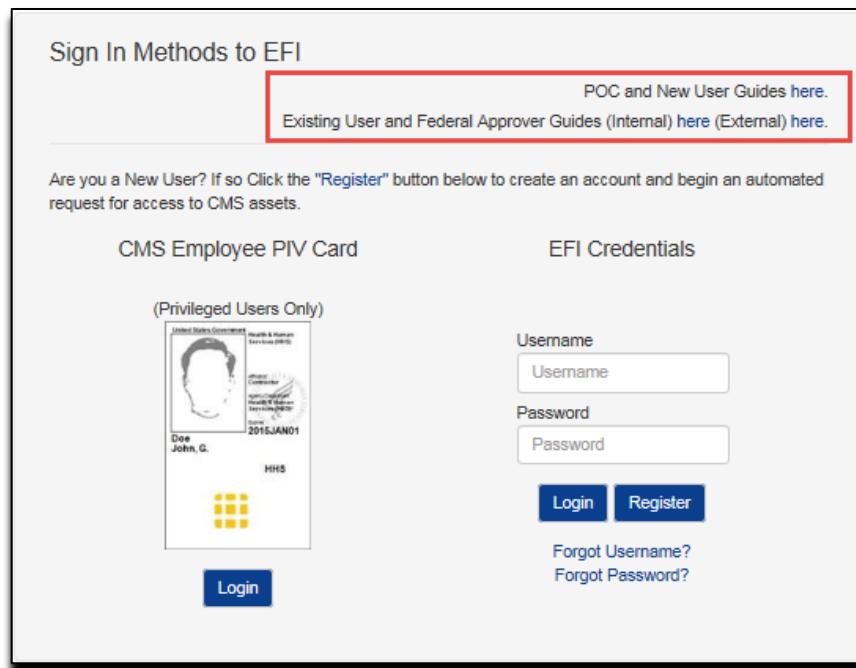
Figure 68: Microsoft Edge

0.4 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. If a PIV request, and once the COR approves it, the request will be sent to the OSSO for review and final acceptance. When the OSSO accepts the request the user and COR will receive an email notification.

APPENDIX C: WHERE TO FIND THIS USER GUIDE

This User Guide is accessible from the EFI login screen.



Sign In Methods to EFI

POC and New User Guides [here](#).
Existing User and Federal Approver Guides (Internal) [here](#) (External) [here](#).

Are you a New User? If so Click the "Register" button below to create an account and begin an automated request for access to CMS assets.

CMS Employee PIV Card (Privileged Users Only)

Username

Username

Password

Password

Login Register

Forgot Username?
Forgot Password?

Figure 69: POC and User guides' link on Login Screen

This EFI User Guide is accessible to those individuals who have an EUA account and are on the CMS domain via this internal link:

<https://vpnext.cms.local/EUADOCS>

This EFI User 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 D: HOW TO CLEAR CACHE IN INTERNET EXPLORER BROWSER

1. On the Internet Explorer Tools menu, click Internet Options. The Internet Options box should open to the General tab.
2. On the General tab, in the Browsing History section, click the Delete button
3. When the box opens please check Preserve Favorites website data, Temporary Internet files and website files, and Cookies and website data (see screenshot) and then click the Delete button.

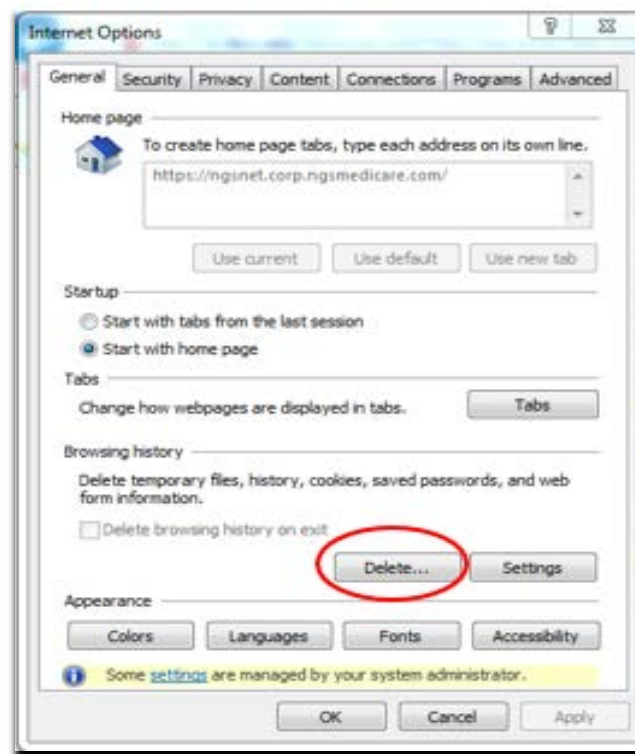


Figure 70: How to clear cache - Internet Options – Delete button

4. This will delete all the files that are currently stored in your current cache.

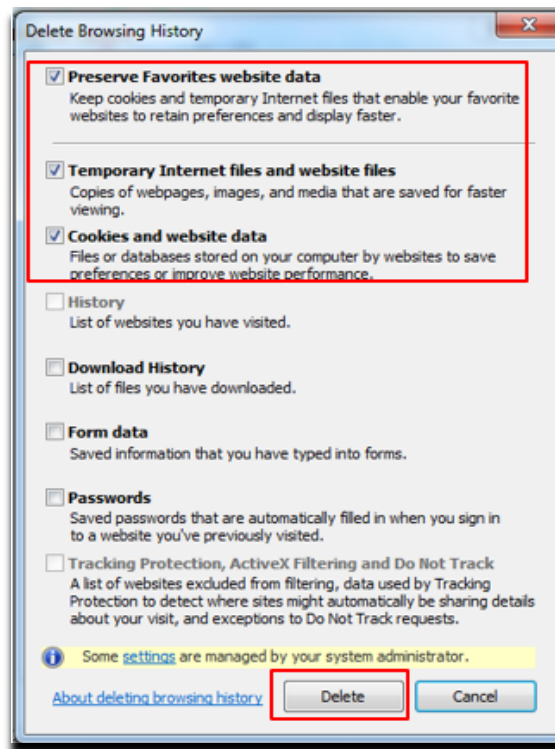


Figure 71: How to clear cache – Delete Browsing History screen

APPENDIX E: REVISION HISTORY

| Date | Version | Description of Changes |
|------------|---------|--|
| 09/27/2016 | 1.0 | Guide for CA-EUA |
| 03/07/2018 | 2.0 | Updated Screenshots and combined EFI User Guide Manual |
| 05/23/2018 | 2.1 | Updated document for new development. |
| 06/06/2018 | 2.2 | Updated document for new development. |
| 06/19/2018 | 2.3 | Updated password change screenshots |
| 08/10/2018 | 2.4 | Updated screenshots and text supporting Additional Documents Need to be Uploaded feature. |
| 9/6/2018 | 2.5 | Added section 16.1, Expiring Contract Notification |