



# CMS Enterprise Identity Management (EIDM) User Guide

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

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

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# EIDM User Guide

## 1. Introduction

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

### **What is EIDM?**

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

### **What is the “EIDM User Guide”?**

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

## 2. Before You Begin



Before accessing the application, consider certain computer settings to ensure it functions properly.

To optimize your EIDM system access, check the following items:

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

### Note

Verify the latest versions of JAVA or ActiveX by going to the JAVA website ([www.java.com](http://www.java.com)) and Adobe website ([www.adobe.com](http://www.adobe.com)), or by contacting your internal IT Help Desk.

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

As part of getting started, please review the following procedures:

1. How to [verify your Computer Settings](#)
2. [What you may need before you begin](#)

If needed, please refer to [Appendix A: Accessing EIDM in 508 Accessibility Mode](#).

## Verify Your Computer Settings

This section outlines the steps to verify your computer settings.

	Action
<b>Step 1</b>	Verify your screen resolution.  <b>Windows 7 and 8:</b> Select the <b>Start</b> button, select <b>Control Panel</b> , find <b>Appearance and Personalization</b> , and select <b>Adjust Screen Resolution</b> . Ensure the correct monitor is selected in the <b>Display</b> drop-down list. Below that list, the <b>Resolution</b> drop-down list displays your setting. Note this setting and select <b>Cancel</b> to leave your settings as they are.
<b>Step 2</b>	Install the latest version of JAVA and ActiveX.  <b>JAVA:</b> Open your browser, navigate to <a href="http://java.com">java.com</a> , select <b>Free Java Download</b> , select <b>Agree and Start Free Download</b> , open the download, accept the terms, and select <b>Install</b> , select <b>Next</b> , wait for the program to install, and select <b>Close</b> .  <b>ActiveX:</b> Open your browser, navigate to <a href="http://get.adobe.com/flashplayer">get.adobe.com/flashplayer</a> , select <b>Adobe® Flash® Player system plug-in</b> , select <b>Install Now</b> , open the download, select <b>Run</b> , accept the terms, and select <b>Next</b> , wait for the program to install, and select <b>Finish</b> .

## Action

**Step 3** Disable your browser's pop-up blockers.

**Internet Explorer 11:**

Open your browser, select the **Tools** icon, select **Internet options**, open the **Privacy tab**, uncheck the **Turn on Pop-up blocker** checkbox, and select **OK**.

**Firefox:**

Open your browser, select the **Menu** icon, select **Content** in the navigation pane, find the **Pop-ups** section, and uncheck the **Block Pop-up windows** checkbox.

**Chrome:**

Open your browser, select the **Menu** icon, select **Settings**, select **Show Advanced Settings**, find the **Privacy** section, select **Content Settings**, find the **Pop-Ups** section, select **Allow all sites to show pop-ups**, and select **Done**.

**Safari:**

Open your browser, select the **Safari** button, select **Preferences**, open the **Security** tab, find the **Web content** section, and uncheck the **Block pop-up windows** checkbox.

## What You May Need Before You Begin

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

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

## 3. Registering for the Portal

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

- Action**
- Step 1** Navigate to <https://portal.cms.gov>. The **CMS Enterprise Portal** page displays as illustrated below.



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



Action

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

### Terms and Conditions

#### Consent To Monitoring

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

#### Protecting Your Privacy

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

#### Collection Of Personal Identifiable Information (PII)

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

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

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

➔ I agree to the terms and conditions

Cancel

➔ Next

**Action**

**Step 4** The **Your Information** page displays.

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

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

**Note**  
 You may select **Cancel** at any time to exit out of the registration process. New information or changes entered do not save.

**Your Information**

Enter your legal first name and last name, as it may be required for identity verification.

\* First Name:  Middle Name:

\* Last Name:  Suffix:

---

Enter your email address, as it will be used for account related communications.

\* E-mail Address:

Re-enter your email address.

\* Confirm E-mail Address:

---

Enter your full 9 digit social security number, as it may be required for identity verification.

Social Security Number:

---

Enter your date of birth, as it may be required for identity verification.

\* Date of Birth: MM  DD  YYYY

---

Enter your current or most recent home address, as it may be required for identity verification.

\* Home Address Line 1:

Home Address Line 2:

\* City:  \* State:  \* Zip Code:  Zip Code Extension:  Country: USA

---

Enter your primary phone number, as it may be required for identity verification.

\* Primary Phone Number:

**Action**

**Step 5** After providing the required information on the **Your Information** page, the **Choose User ID and Password** page displays.

Create and enter a user ID of your choice, based on the requirements for creating a user ID.

**Note**  
EIDM displays instructions on what you are required to include in your user ID.

**Choose User ID And Password**

\* User ID

\* Password

\* Confirm Password

**Select your Challenge Questions and Answers:**

Your challenge questions and answers will be required for password and account management functions.

\* Question:1  \* Answer:1

\* Question:2  \* Answer:2

\* Question:3  \* Answer:3

**Step 6** Create and enter a password of your choice. Enter the same password in the **Confirm Password** field.

**Notes**

- EIDM displays instructions on what you are required to include in your password.
- The passwords must match before you can continue.

**Choose User ID And Password**

\* User ID

\* Password

\* Confirm Password

**Select your Challenge Questions and Answers:**

Your challenge questions and answers will be required for password and account management functions.

\* Question:1  \* Answer:1

\* Question:2  \* Answer:2

\* Question:3  \* Answer:3

**Action**

**Step 7** After entering the user ID and password you have created, select a question of your choice in the **Select your Challenge Questions and Answers** section and enter the answer you want to be saved with the question.

Continue to select a question and enter an answer for Question 2 and Question 3.

Select **Next** to complete the registration process.

**Note**

You may select **Cancel** to exit out of the registration process. New information or changes entered do not save.

**Choose User ID And Password**

\* User ID

\* Password

\* Confirm Password

**Select your Challenge Questions and Answers:**

Your challenge questions and answers will be required for password and account management functions.

* Question:1	* Answer:1
What is your favorite radio station?	ktes
* Question:2	* Answer:2
What was your favorite toy when you were a child?	ball
* Question:3	* Answer:3
What is your favorite cuisine?	pizza

**Step 8** The **Registration Complete** page displays and informs you that you should receive an e-mail that acknowledges your successful registration and includes your user ID.

Select **OK** to close the **Registration Complete** page.

**Registration Complete**

You have now successfully completed your registration to CMS Enterprise Identity Management (EIDM). You will receive an E-mail acknowledging your successful registration to EIDM and the E-mail will include your User ID.

Please wait 5 minutes before logging in. Selecting the 'OK' button will direct you to the CMS Portal Landing page.

## 4. Logging In

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

**Action**

**Step 1** Navigate to <https://portal.cms.gov>. The **CMS Enterprise Portal** page displays as illustrated below.



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



**Action**

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

**Terms and Conditions**

OMB No.0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:  
 You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.  
 At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.



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

**Welcome to CMS Enterprise Portal**

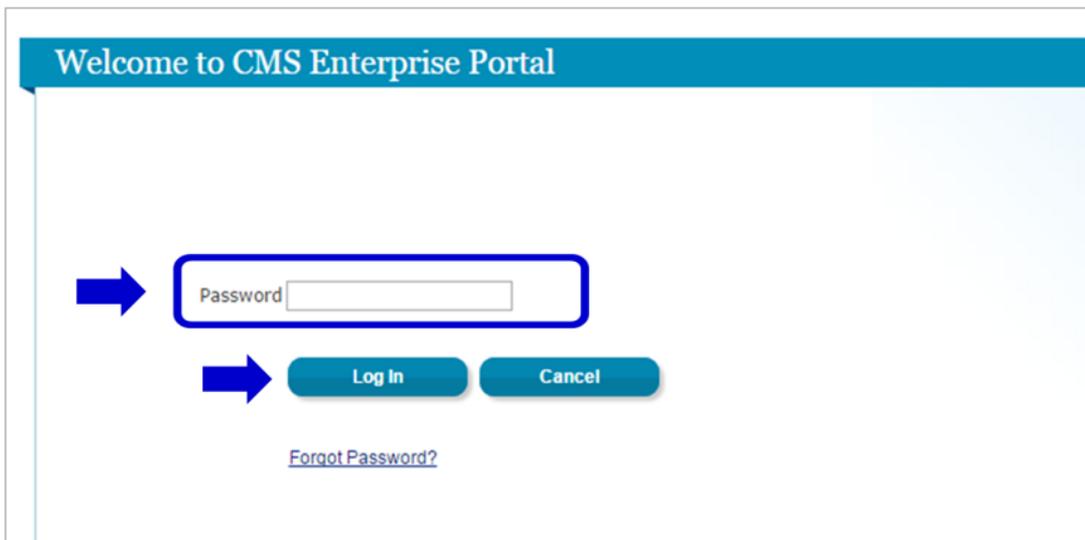




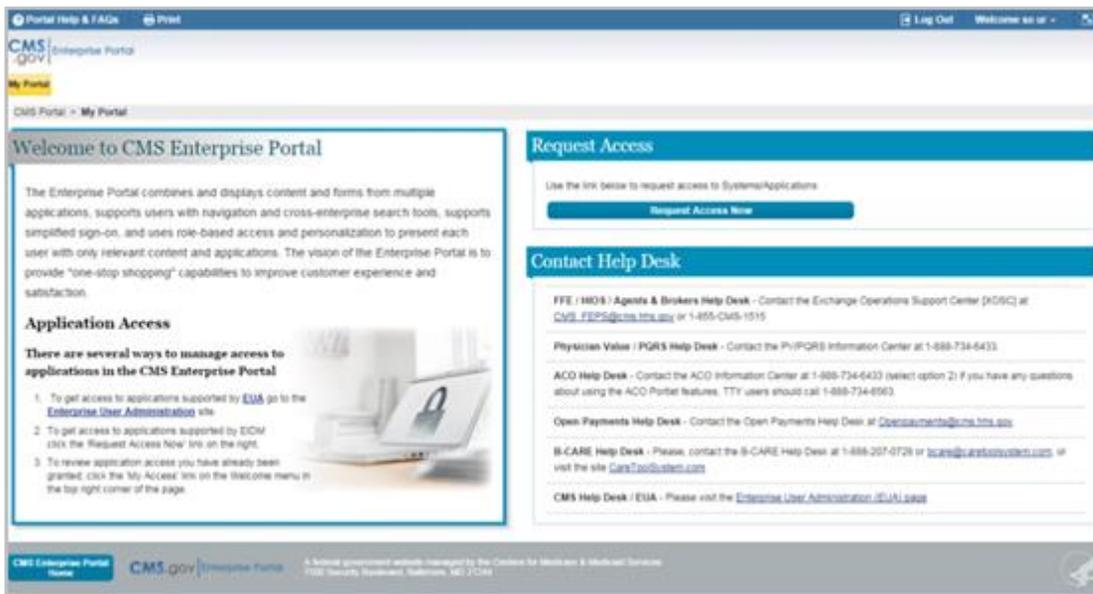
[Forgot User ID?](#)  
 Need an account? Click the link - [New user registration](#)

Action

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



**Step 6** The system displays the **Welcome to CMS Enterprise Portal** page.



## 5. Requesting Access

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

### Note

If you do not have a user ID and password, you have to register and create a user ID and password. Please follow the steps under [Error! Reference source not found.](#)

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

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

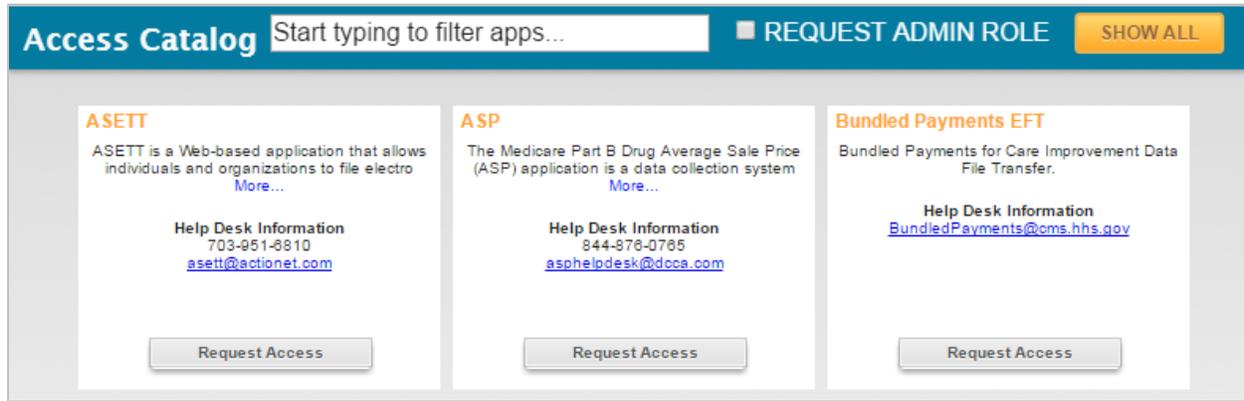
After following the instructions for [Error! Reference source not found.](#), EIDM prompts you to enter or select any additional information needed, based on the application and role you are requesting. In addition, EIDM displays help messages to assist you in completing your requests.

### Note

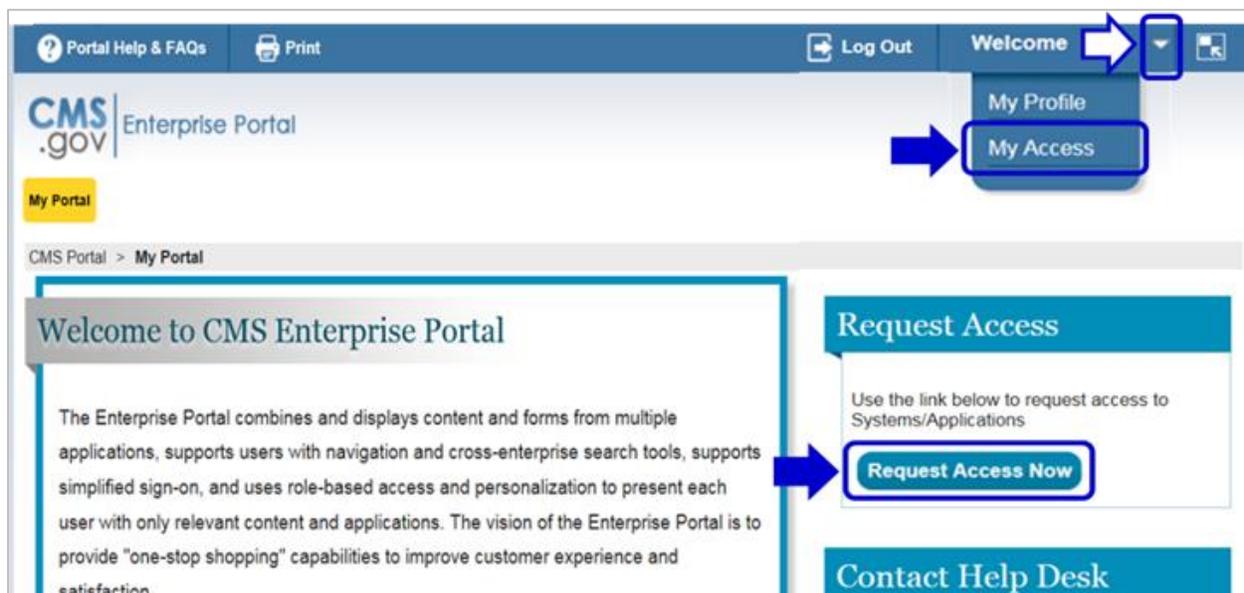
If you currently have a role in an application and you need to request access for another role in the same application, please follow the step-by-step instructions for [How to Add a Role](#)

## The Application Access Catalog

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



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



## Access Catalog Features

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

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

The screenshot displays the CMS Enterprise Portal interface. At the top, there are navigation tabs for 'My Portal' and 'Marketplace Change Utility'. Below this is a breadcrumb trail: 'CMS Portal > EIDM > menu page > My Access'. The main content area is titled 'Access Catalog' and features a search bar with the placeholder text 'Start typing to filter apps...'. To the right of the search bar, there is a 'REQUEST ADMIN ROLE' button and a 'SHOW ALL' button. The main area contains a grid of application tiles, each with a title, description, help desk information, and a 'Request Access' button. The tiles include ASETT, ASP, Bundled Payments EFT, CCIIO Enrollment Resolution and Reconciliation System, COB, Connexion, CSR, DMEPOS Bidding System (DBids), and EIDM. On the right side, there is a 'My Access' panel for the selected application (MCU). This panel shows 'Help Desk Information' (855-CMS-1515), 'Existing Roles' (MCU Tier-1 (Read Only)), and an 'Available Actions' menu with options: 'Add Role', 'Remove Role', and 'Other Actions'. Below this is a 'My Pending Requests' section which states 'You do not have any pending requests at this time.' Red numbered callouts (1-7) are overlaid on the image to highlight specific features: 1 points to a 'Request Access' button on the ASETT tile; 2 points to the search bar; 3 points to the 'My Access' header; 4 points to the 'Available Actions' menu; 5 points to the 'My Pending Requests' section; 6 points to the 'Request Access' button for the ASETT application; and 7 points to the 'Request Access' button for the ASETT application.

## How to Request a Role

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

### Important Note

To request a role for one of the applications listed below, please [To](#) request a role for one of the applications listed below

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

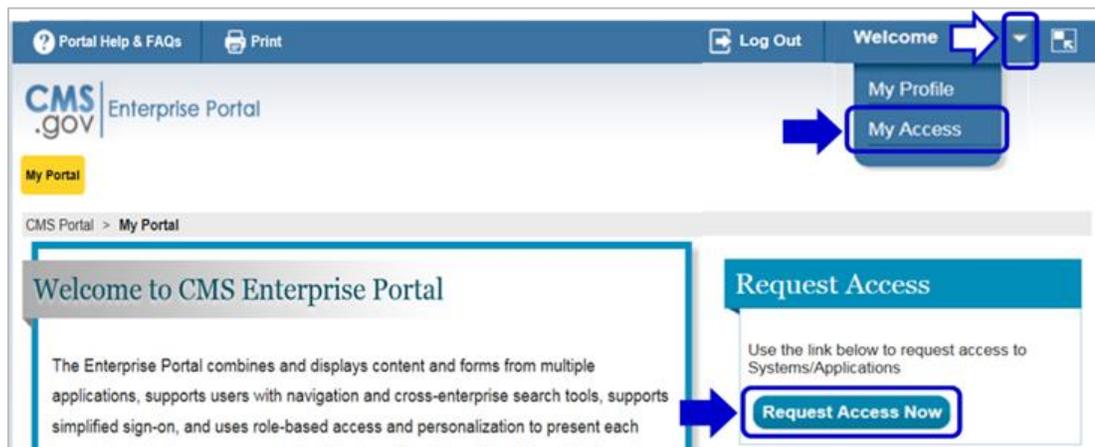
To request a role for all other applications, please **FOLLOW THESE STEPS.**

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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

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



## Action

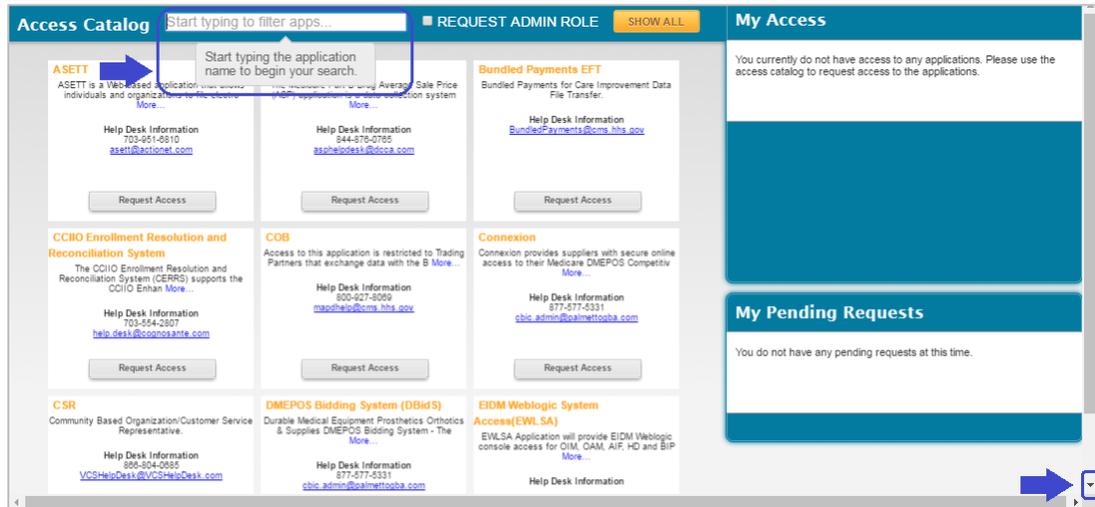
**Step 2** The application **Access Catalog** displays.

Scroll down to locate the application you need.

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

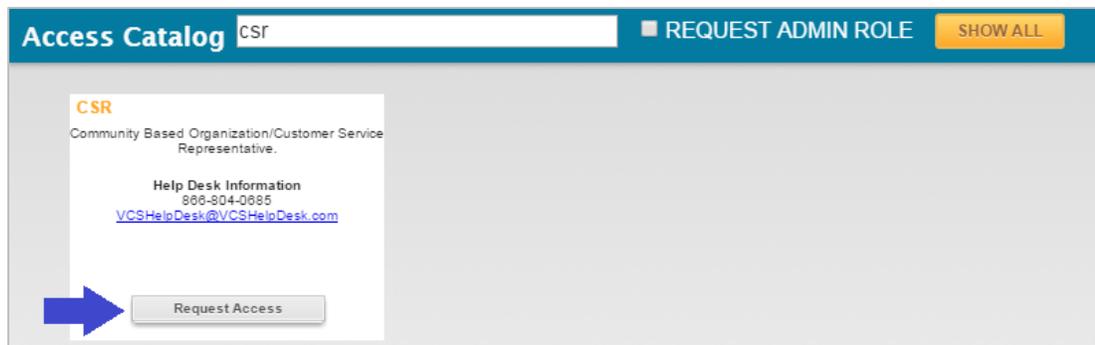
## Note

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



**Step 3** After entering the first few letters of the application in **Search**, the applications beginning with those letters are displayed.

Select **Request Access** for the application you need.



## Action

**Step4** The **Application Description** and **Select a role** sections are displayed.

Select the role you need from the **Select a role** drop-down list.

**Request New Application Access**

My Access

- Modify Business Contact Information
- View and Manage My Access
- Request New Application Access

Requests

- My Pending Approvals
- My Pending Requests

Application Description: CSR  
Community Based Organization/Customer Service Representative.

Select a role: User

**Step 5** The **Request New Application Access** page displays.

If all of your required business contact information is not on file, you have to provide this information before you can continue.

Required fields are marked with an asterisk (\*) and an error message displays, if the information has not been entered or selected correctly, or is entered in the wrong format.

**Note**

If all of your business contact information is on file, the **“Please update your profile...”** message does not display and the **Select a role** drop-down list displays for you to continue.

If the **“Please update your profile...”** message displays, enter the required information and then select **Next**.

**Request New Application Access**

Please update your profile to continue the request for an application access.

**Name**

Title: [v] First Name: Lee Middle Name: Last Name: Wilson

Professional Credentials:

Social Security Number: 120-25-9652

**Business Contact Information**

\* Company Name: ABC

\* Address 1: 123 Main Street

Address 2:

\* City: Any Town \* State/Territory: Arkansas \* Zip Code: 33333 Zip Code Extension:

**Phone**

\* Company Phone Number: 333-333-3333 Extension:

\* Office Phone Number: 333-333-3333 Extension:

Next Cancel

## Action

**Step 6** After providing your business contact information, EIDM may ask you to provide some additional information that is required for your application and the role you have selected.

Provide any additional information that is requested, enter a reason for the request in the **Reason for Request** box and then select **Submit**.

## Note

[What You May Need Before You Begin](#)

In the example below, we selected the CSR application and the **User** role. EIDM also needs to know the Call Center. We selected 22nd Avenue, Phoenix, AZ from the list of Call Centers and then selected the single right arrow icon. This moved the 22nd Avenue, Phoenix, AZ Call Center to the Selected Call Center(s) box. We then entered the reason for the request in the **Reason for Request** box and select **Submit** to continue the process.

The screenshot displays the 'Request New Application Access' form. The 'Application Description' is set to 'CSR' (Community Based Organization/Customer Service Representative). The 'Select a role' dropdown is set to 'User'. The 'Role Description' states: 'The user with this role is a customer service representative or staff member who organization.' The 'Call Center' section shows a list of call centers on the left and a 'Selected Call Center(s)' box on the right. The call center '22nd Avenue, Phoenix, AZ' has been moved from the list to the selected box. The 'Reason for Request' field contains the text 'Needed for the role.' The 'Submit' and 'Cancel' buttons are visible at the bottom right.

## Action

## Step 7

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

## Note

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

**Request New Application Access Review**

Application Description: CSR  
Community Based Organization/Customer Service Representative.

**Name**

Title: [v] First Name: Lee Middle Name: Last Name: Wilson

Professional Credentials:

Social Security Number: \*\*\*\*\*9652

**Business Contact Information**

Company Name: ABC

Address 1: 123 Main Street

Address 2:

City: Any Town State/Territory: Arkansas Zip Code: 33333 Zip Code Extension:

**Phone**

Company Phone Number: 333-333-3333 Extension:

Office Phone Number: 333-333-3333 Extension:

Role Selected: User  
Role Description: The user with this role is a customer service representative or staff member wh

Call Center: 28th Avenue, Phoenix, AZ  
Black Canyon, Phoenix, AZ  
Coralville, IA  
Corbin, KY  
Lawrence, KS  
Palmetto, Lawrence, KS  
Palmetto, Richmond, VA  
Richmond, VA  
Senture, Monticello, KY  
Tampa, FL

Reason for Request: Needed for the role.

Submit Cancel

## Action

## Step 8

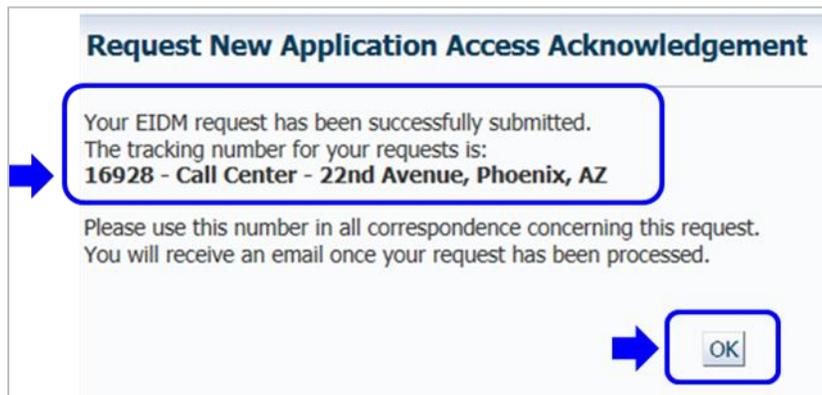
After selecting Submit, the **Request New Application Access Acknowledgement** page displays.

The acknowledgement page displays the tracking number for the request and informs you that you should receive an e-mail when the request has been processed.

**Note**

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

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



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

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

Please **FOLLOW THESE STEPS**:

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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

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



### Action

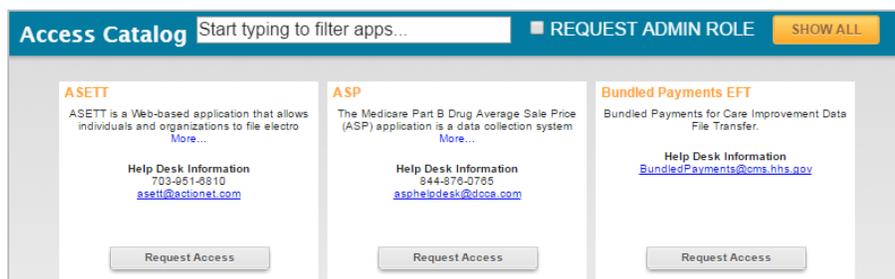
**Step 2** The application **Access Catalog** displays.

Scroll down to locate the application you need.

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

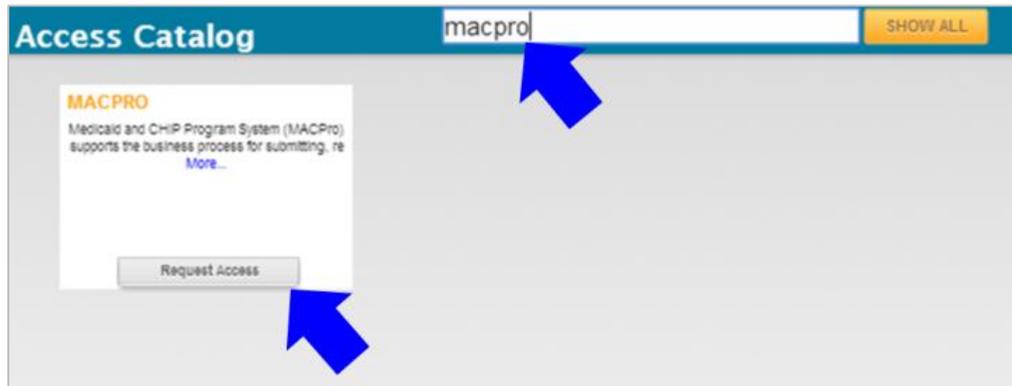
#### Notes

- The applications are listed by their acronym not their full name. You must use the acronym of the application to search.
- If you currently have access to one or more applications, those applications are displayed in the **My Access** section. If you have pending requests, they are displayed in the **My Pending Requests** section.



## Action

**Step 3** Select the **Request Access** button on the application tile.



**Step 4** The **Request New System Access** page for that application displays.

Select a **Role** from the drop-down list. There may also be additional information that you need to provide to request a role, such as **State**, **Region**, **Authorization Code**, **User Type**, or other user information.

The screenshot shows the 'Request New System Access' page. On the left, there is a 'My Access' sidebar with links for 'Request New System Access' and 'View and Manage My Access'. The main content area has the title 'Request New System Access' and instructions: 'Select a System and then a role to request access.' Below this, there is a 'System Description' dropdown menu set to 'MACPRO-Medicaid and CHIP Program'. The 'Role' dropdown menu is highlighted with a blue arrow. At the bottom, there is a 'Cancel' button.

The screenshot shows the 'Request New System Access' page with more fields filled out. The 'System Description' dropdown is still 'MACPRO-Medicaid and CHIP Program'. The 'Role' dropdown is now 'MACPRO State User'. The 'Region' dropdown is 'CMS Region 9 San Francisco CA' and the 'States and Territories' dropdown is 'California'. There is a 'Notes to the Approver' field with a text area and a 'Submit' button. Blue arrows point to the 'Region' and 'States and Territories' dropdown menus.

## Action

## Step 5

Select the **Submit** button to submit the request. To terminate the request, select the **Cancel** button and the system returns you to the **View and Manage My Access** page.

Depending on the application selected, you may have the option of entering a message in the **Notes to the Approver** field shown below.

**My Access**

[Request New System Access](#)  
[View and Manage My Access](#)

### Request New System Access

Select a System and then a role to request access.

Depending on your Level of Assurance (LOA) and the role that you request access to, to satisfy system security requirements you may need to complete [Identity Verification](#), establish credentials for [Multi-Factor Authentication \(MFA\)](#), or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identity Verification is complete and Multi-Factor Authentication (MFA) is established.

\* System Description:

\* Role:

\* Region:

\* States and Territories:

Notes to the Approver:

## Step 6

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

**Note**

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

### Request Acknowledgement

Your request to access FFE Application using the FFE Application Approver role has been successfully submitted

Your request id is : 1367

Please use this number in all correspondence concerning this request.

You will be contacted via E-mail after your request has been processed

## Action

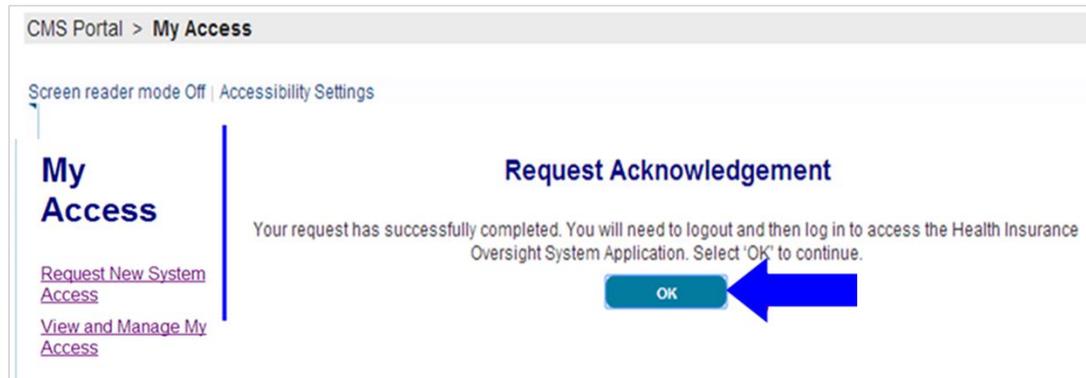
## Step 7

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

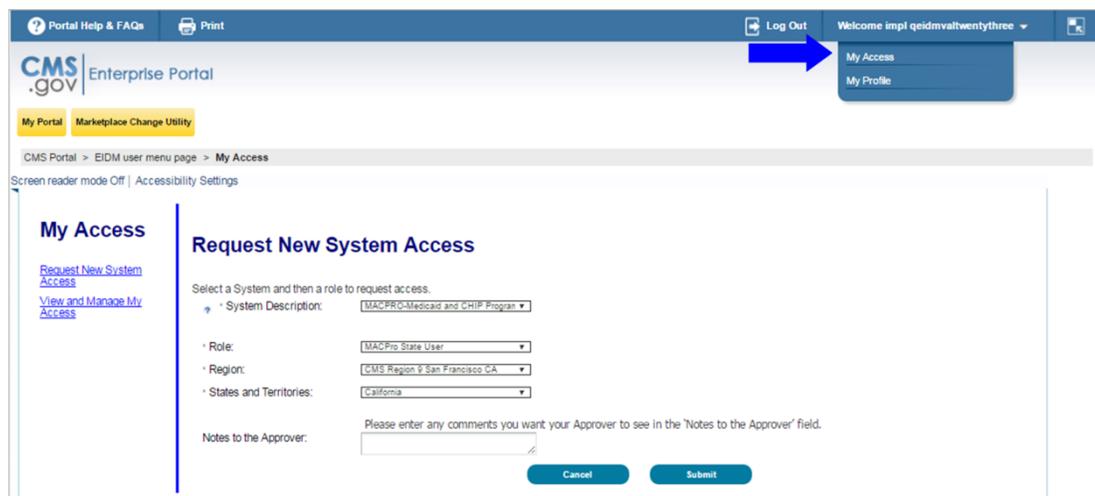
Select the **OK** button to exit the screen and return to the **View and Manage My Access** page.

## Note

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



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



## How to Cancel a Pending Role Request

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

### Important Note

To cancel a pending role request for one of the applications listed below, please [TO CANCEL](#) a role for one of the applications listed below.

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

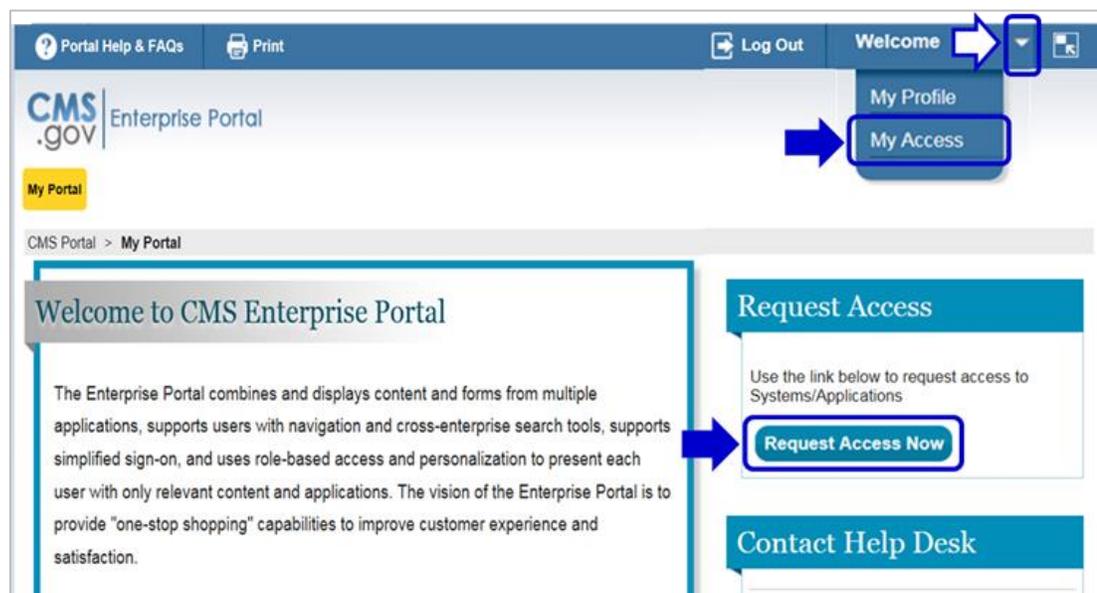
To cancel a pending role request for all other applications, please **FOLLOW THESE STEPS**.

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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

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



## Action

**Step 2** The application **Access Catalog** displays.

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

Request ID	Application Name	Role Name
<a href="#">277759</a>	IC Application	Innovation Center Business Owner

**Step 3** The **Pending Requests** panel displays on the **View and Manage My Access** page.

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

Request Number	Application	Role	Request Expires	Cancel Request
278169	CSR	Authorizer	05/11/2016	<a href="#">Cancel</a>

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

**Confirmation**

Are you sure you want to cancel this pending role request? Once the request is canceled, you may need to request access for the role again. Select 'OK' to continue. Otherwise, select 'Cancel'.

[OK](#) [Cancel](#)

## Action

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



**Step 6** You should receive an e-mail notification that the role request has been cancelled.

Your request **277759** has been canceled.

You requested:  
Application Name: IC Application  
Role Name: IC\_BO

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

Thank you,  
CMS.gov

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

**Note**

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

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

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

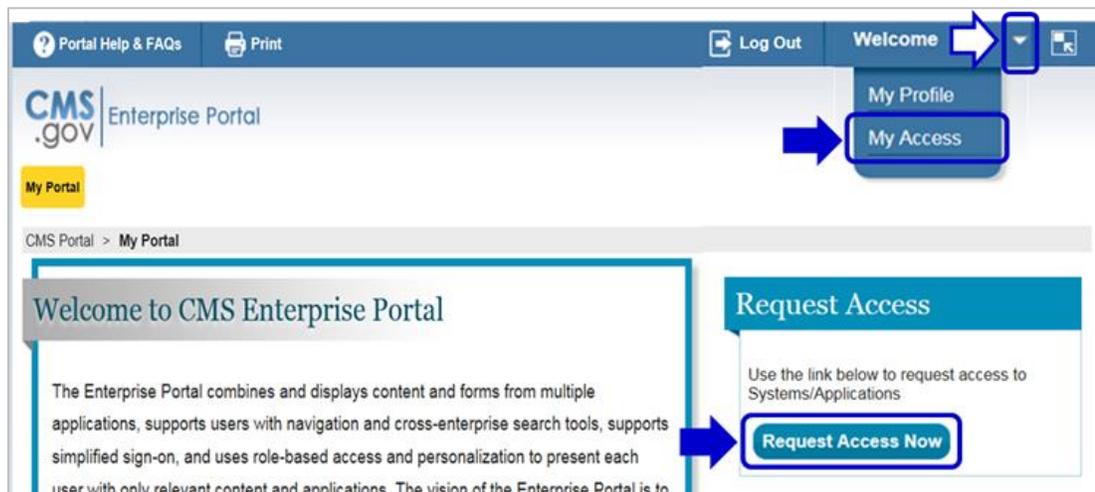
Please FOLLOW THESE STEPS:

**Action**

**Step 1** [Log into the CMS Enterprise Portal.](#)

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

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



**Step 2** The application **Access Catalog** displays.

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



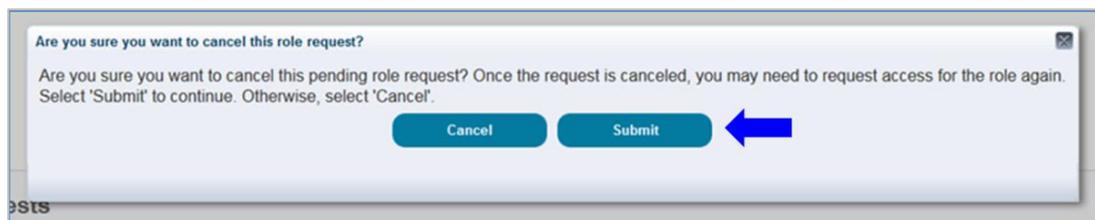
## Action

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

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



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



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



**Step 6** You should receive an e-mail notification that the role request has been cancelled.

Your request **277759** has been canceled.

You requested:  
 Application Name: IC Application  
 Role Name: IC\_BO

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

Thank you,  
 CMS.gov

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

**Note**

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

## Identity Verification

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

### Note

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

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

### Action

- Step 1** If you select a role that requires identity verification, the **Identity Verification** page displays. Select **Next** to begin the Identity Verification process.

### Identity Verification

To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

1. Ensure that you have entered your legal name, current home address, primary phone number, date of birth and E-mail address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
2. Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website -<http://www.experian.com/help/>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select 'Next'.



## Action

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

### Terms and Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

### Protecting Your Privacy

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

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

### HHS Rules Of Behavior

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

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

### Identity Verification

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

I agree to the terms and conditions

Next

Cancel

## Action

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

### Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.

\* First Name:  Middle Name:

\* Last Name:  Suffix:

---

Enter your E-mail address, as it will be used for account related communications.

\* E-mail Address:

Re-enter your E-mail address.

\* Confirm E-mail Address:

---

Enter your full 9 digit Social Security Number, as it may be required for Identity Verification.

\* Social Security Number:

---

Enter your date of birth in MM/DD/YYYY format, as it may be required for Identity Verification.

\* Date of Birth:

U.S. Home Address  Foreign address

Enter your current or most recent home address, as it may be required for Identity Verification.

\* Home Address Line 1:

Home Address Line 2:

\* City:  \* State:  \* Zip Code:  Zip Code Extension:  Country: USA

---

Enter your primary phone number, as it may be required for Identity Verification.

\* Primary Phone Number:



## Action

**Step 4** Depending on the information you provided, the **Verify Identity** page may be displayed. You are required to answer several questions about information that may be in your personal records. Please answer the questions to the best of your ability.

Select the **Next** button to submit the request. If you wish to terminate the request, select **Cancel** to return to the **View and Manage My Access** page.

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

**Note**

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

## Identity Cannot be Verified

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

Please follow the steps below.

### Action

**Step 1** Check your personal information before trying again to register with the system.

**Step 2** If you have entered the correct information and still cannot be verified, you are instructed to call the Experian Help Desk and provide the **Review Reference Number** displayed on the screen so the help desk representative can help you verify your identity. Experian is the contractor CMS uses to complete the Identity Verification process.

#### Identity Verification

We are unable to verify the information you provided. Check your personal information before trying again to register with this system. If you think you have entered the correct information, please contact Experian Verification Support Services a 1-866-578-5409 and provide the Rescue Reference Number - 1246VSCO20

OK

**Step 3** After you have contacted Experian login to CMS Enterprise Portal and proceed again through Role Request process (see [How to Request a Role for the steps](#)).

**Step 4** On the **Your Information** screen, select the check box if you have contacted Experian and completed the identity verification process over the phone with the Experian Support personnel.

#### Note

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

Enter your information in the required fields.

The screenshot shows the 'Your Information' form. At the top, there is a checkbox labeled 'Please select the checkbox if you have contacted the Experian Verification Support Services'. A blue arrow points to this checkbox. Below the checkbox, the form title 'Your Information' is displayed. Underneath, there is a prompt: 'Enter Your legal first name and last name, as it may be required for Identity Verification.' There are two input fields: '\* First Name' containing 'CARMELLA' and 'Middle Name' which is empty.

**Step 5** If your identity cannot not be verified by Experian, please contact your Application Help Desk for the next steps (see [Appendix B: Application Help Desk Information for the contact information](#)).

**Action**

**Note**

Depending on the type of role you requested, you may not be granted the role you requested until you have successfully undergone ID proofing.

## Multi-Factor Authentication (MFA) Registration

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

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

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

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

### Notes

- Delays in e-mail transmission, spam filters, and other issues outside the user's control can make this the least desirable option to receive a security code.
- While the 'Security Code' for the VIP Access Software refreshes automatically every 30 seconds, the 'Security Code' for the 'E-mail' and 'One-Time Security Code' options expire in 30 minutes. The 'Security Code' for the other MFA device types expire in 10 minutes. If you are unable to enter the code within the allotted period, you must request a new one.

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

### Action

- Step 1** If you select a CMS MFA-protected application, the **Multi-Factor Authentication Information** page displays. Select **Next** to begin the MFA Registration process.



## Action

- Step 2** To make your account more secure, you are directed to the **Register Your Phone, Computer, or E-Mail** page. Select the **MFA Device Type** you wish to register from the drop-down list.

**Register Your Phone, Computer, or E-mail**

Adding a Security Code to your login also known as Multi-Factor Authentication (MFA) can make your login more secure by providing an extra layer of protection to your user name and password.

You can associate the Security Code to your profile by registering your phone, computer or E-mail. Select the links below to find out more information about the options.

- ▼ **Phone/Tablet/PC/Laptop**

To use the Validation and ID Protection (VIP) access software on your phone, you must download the VIP Access software to your phone, if you do not already have it. Select the following link -<https://m.vip.symantec.com/home.v>

To use VIP access software on your computer, you must download the VIP Access software, if you do not already have it. Select the following link -<https://idprotect.vip.symantec.com/desktop/download.v>
- ▼ **Text Message Short Message Service (SMS)**

The SMS option will send your Security Code directly to your mobile device via text message. This option requires you to provide a ten (10) digits U.S. phone number for a mobile device that is capable of receiving text messages. Carrier service charges may apply for this option.
- ▼ **Interactive Voice Response (IVR)**

The IVR option will communicate your Security Code through a voice message that will be sent directly to your phone. The option requires you to provide a valid ten (10) digits U.S. phone number and (Optional) extension that will be used during login to obtain the Security Code. The extension may begin with any one of the following: asterisks "\*", period ".", comma ","; pound "# followed by numeric 0 to 9. For example: 4885554444, 1112.

To access the application you must enter the provided Security Code on the login page. Carrier service charges may apply for this option.
- ▼ **E-mail**

The E-mail address on your profile will be used when registering for Multi-Factor Authentication (MFA) using E-mail option. When logging into a secure application, your Security Code that is required at the login page will be e-mailed to the e-mail address on the profile.

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your device within two attempts please log out, then log back in to try again.

Select the MFA Device Type that you want to use for logging into your application.

MFA Device Type:

## Notes

- **For VIP Client:** Enter the Credential ID generated by the VIP Access client.
- **For Text:** You have to enter a valid phone number to receive your Security Code.
- **For Interactive Voice Response (IVR):** Enter the phone number and (optional) extension to be used during login to obtain the Security Code. The extension may begin with any one of the following: asterisks '\*'; period '.'; comma ','; pound '#', followed by numeric 0 to 9. For example: 4885554444, 1112.
  - , **(comma)** Creates a short delay of approximately 2 seconds;
  - . **(period)** Creates a longer delay of approximately 5 seconds;
  - \***(asterisks)** Used by some phone systems to access an extension;
  - # **(pound/hash)** Used by some phone systems to access an extension; and
- You may use a comma if you are not sure of the special character supported by your company's phone system.
- **For E-mail:** The e-mail on your profile is used to send the Security Code required at login.

Using the VIP Client

1. Depending on the option you select, download the VIP Access software from the URL provided on the **Register Your Phone or Computer** page.
2. Once downloaded, select the **VIP Access Icon** on your desktop to activate the **VIP Access** window.
3. Select the pages icon next to the **Credential ID** to copy the alphanumeric code.
4. Place your cursor in the **Credential ID** on the **Register Phone or Computer** page and right click to paste it in.



## Action

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

Register Your Phone, Computer, or E-mail

Adding a Security Code to your login also known as Multi-Factor Authentication (MFA) can make your login more secure by providing an extra layer of protection to your user name and password.

You can associate the Security Code to your profile by registering your phone, computer or E-mail. Select the links below to find out more information about the options.

- > Phone/Tablet/PC/Laptop
- > Text Message Short Message Service (SMS)
- > Interactive Voice Response (IVR)
- > E-mail

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your device within two attempts please log out, then log back in to try again.

Select the MFA Device Type that you want to use to login to secure applications from the dropdown menu below.

MFA Device Type:

Credential ID:  Enter the alphanumeric code that

MFA Device Description:  MFA Device Description is a nick-name that can help you identify your device. You are allowed to use alphanumeric characters and special characters, such as apostrophe, dash, and period.

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

Register Your Phone, Computer, or E-mail

You have successfully registered your Phone/Computer/E-mail to your user profile. Please select 'Next' to continue with your role request.

## Optional Multi-Factor Authentication (MFA)

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

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

### Multi-Factor Authentication Information

Adding a security code to your login also known as Multi-Factor Authentication (MFA) can make your login more secure by providing an extra layer of protection to your user name and password. You may choose to add this additional level of security to prevent unauthorized access to your account.

To access a CMS application which requires a security code to be input at the time of login, select "Add MFA" and follow the on-screen instructions to add the additional level of security.

Select "Skip MFA" to skip adding the additional level of security and to continue with the role request. If you choose to skip MFA now, you can always add it later to your account by accessing the 'My Profile' link from the Welcome menu on the top right corner of the page.

Select 'Cancel' to end the role request.

Add MFA
Skip MFA
Cancel

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

Select the MFA Device Type that you want to use to login to secure applications from the dropdown menu below.

\* MFA Device Type

Enter the alphanumeric code that displays under the label Credential ID on your device.

\* Credential ID :

\* MFA Device Description :

Next
Proceed without MFA
Cancel

## 6. Checking the Status of a Pending Request

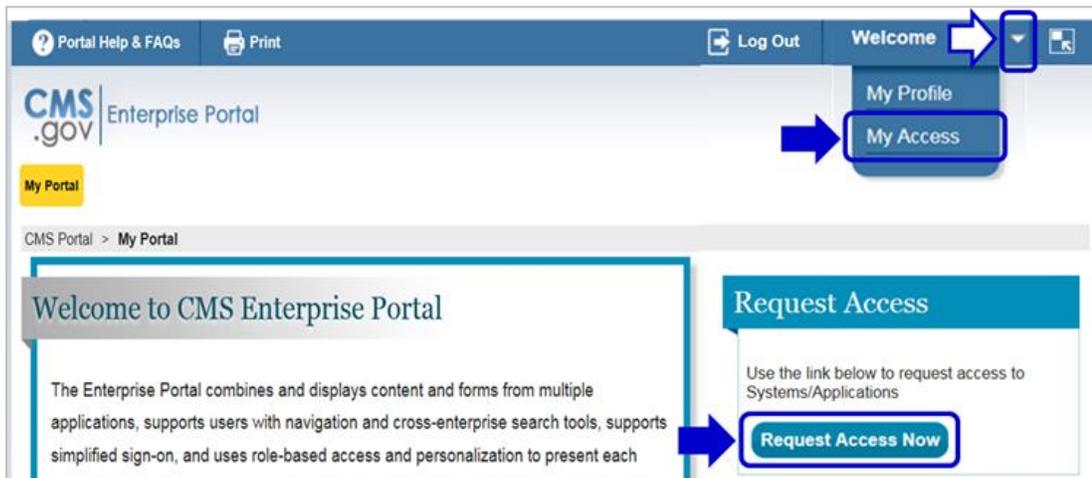
The following are the basic step-by-step instructions on how to use the **My Pending Requests** feature to check the status of a pending request.

**Action**

**Step 1** [Log into the CMS Enterprise Portal.](#)

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

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



**Step 2** The **Access Catalog**, **My Access** and **My Pending Requests** sections are displayed.

Scroll down to **My Pending Requests**. All of your pending requests are displayed in the **My Pending Requests** section.

Select the Request ID number of a pending request to view the details.



**Action**

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

**Note**

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

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

The screenshot displays the 'My Pending Request' section of a web application. On the left is a navigation menu with categories: 'My Access' (containing 'Modify Business Contact Information', 'View and Manage My Access', and 'Request New Approval Access'), 'Requests' (containing 'My Pending Approvals' and 'My Pending Requests'), and 'Administration' (containing 'View and Manage Users' and 'Lookup User's Help Desk'). The main content area is titled 'My Pending Request' and contains the text 'The following is a list of pending requests submitted for approval.' Below this text is a table with the following data:

Submission Date	Request Number	Application	Role	Request Expiration
08/15/2014	150010 - 22nd A...	CSR	User	10/14/2014

A blue arrow points from the 'Request Number' column to the 'Close' button, which is also highlighted with a blue box and a blue arrow.

## 7. Viewing and Changing Your Access

### How to View/Modify Your Business Contact Information

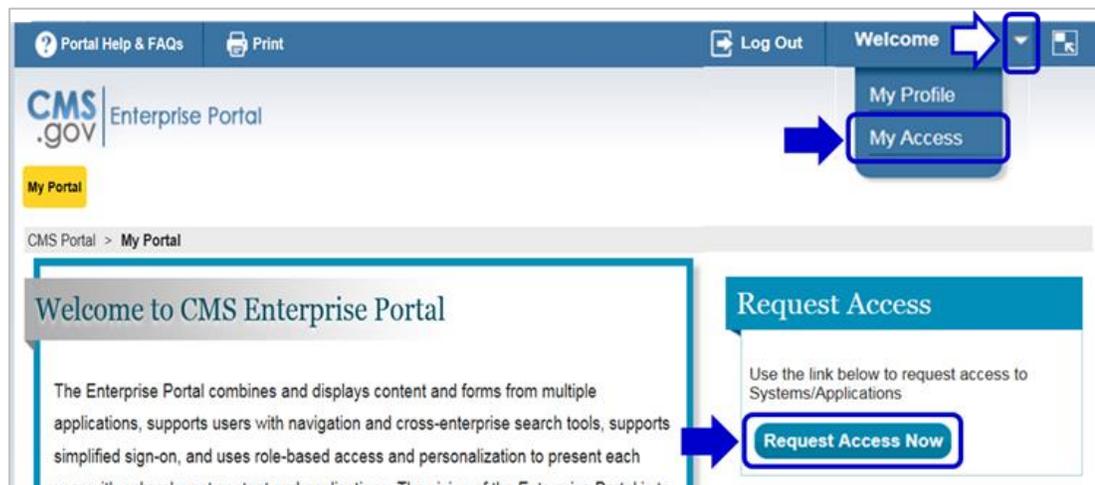
The following are the basic step-by-step instructions on how to use the **Modify Business Contact Information** feature to modify your business contact information.

#### Action

##### Step 1 [Log into the CMS Enterprise Portal.](#)

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

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

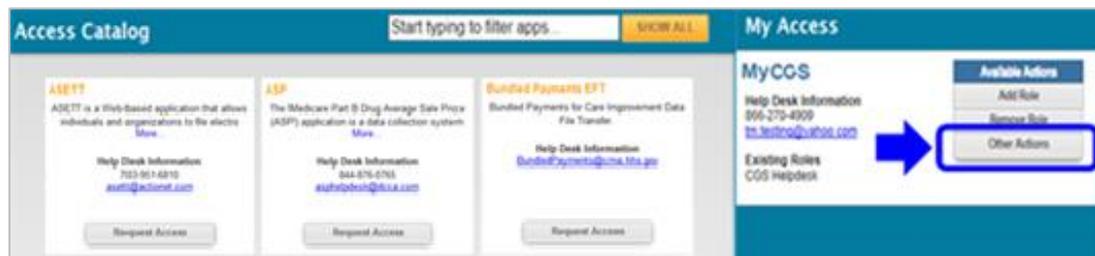


##### Step 2 The **Access Catalog**, **My Access** and **My Pending Requests** sections are displayed.

Select **Other Actions** in the **My Access** section to continue. If there are multiple **Other Actions** options displayed, you may select any "Other Actions" option to continue.

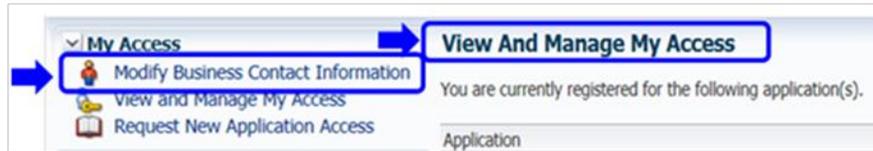
#### Note

If you currently do not have access to at least one application, the **Available Actions** in the **My Access** section are not displayed. You are not able to modify your business contact information until you have been approved for access to at least one application.



## Action

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



- Step 4** The **Modify Business Contact Information** page displays. The fields in gray on the **Modify Business Contact Information** page cannot be changed or deleted.

Modify or enter the appropriate information on the **Modify Business Contact Information** page to update your business contact information.

Select **Next** to complete the **Modify Business Contact Information** process.

**Note**

You may select **Cancel** at any time to exit out of the **Modify Business Contact Information** process. New information or changes do not save.

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

 A screenshot of the 'Modify Business Contact Information' form. The form has a title bar with the text '\* Required Field'. Below the title bar, there is a message: 'Please update your profile to continue the request for an application access.' The form is divided into several sections:
 

- Name:** Includes fields for Title (dropdown), First Name (text, value: 'Clair'), Middle Name (text), Last Name (text, value: 'Roberts'), and Suffix (dropdown).
- Professional Credentials:** A text field.
- Social Security Number:** A text field with the value '231-33-1900'.
- Business Contact Information:**
  - \* Company Name: A dropdown menu with 'Lg Company' selected.
  - \* Address 1: A text field with '234 Main St.'
  - Address 2: A text field.
  - \* City: A text field with 'Westminster'.
  - \* State/Territory: A dropdown menu with 'Maryland' selected.
  - \* Zip Code: A text field with '21157'.
  - Zip Code Extension: A text field.
- Phone:**
  - \* Company Phone Number: A text field with '290-222-2222'.
  - Extension: A text field.
  - \* Office Phone Number: A text field with '290-222-2222', which is highlighted with a blue box and a blue arrow pointing to it.
  - Extension: A text field.

 At the bottom right of the form, there are two buttons: 'Next' and 'Cancel'. The 'Next' button is highlighted with a blue box and a blue arrow pointing to it.

## Action

**Step 5** The **Modify Business Contact Information - Review** page displays.

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

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

**Note**

You may select **Cancel** to exit out of the Modify Business Contact Information process. New information or changes entered do not save.

**Step 6** After selecting Submit, the **Modify Business Contact Information – Acknowledgement** page displays. The acknowledgement page displays the tracking number, for future correspondence, and informs you that you should receive an e-mail when the request has been processed.

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

## How to View/Modify Your Existing Role Information

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

- When you registered for a role, you may have also registered for additional features, reports, or other details needed for your role. These are called role “attributes”.
- To [view your role information](#), follow steps 1-5.
- To [add an attribute to your role](#), continue with steps 6-8.
- To [remove an attribute from your role](#), continue with steps 9-13.

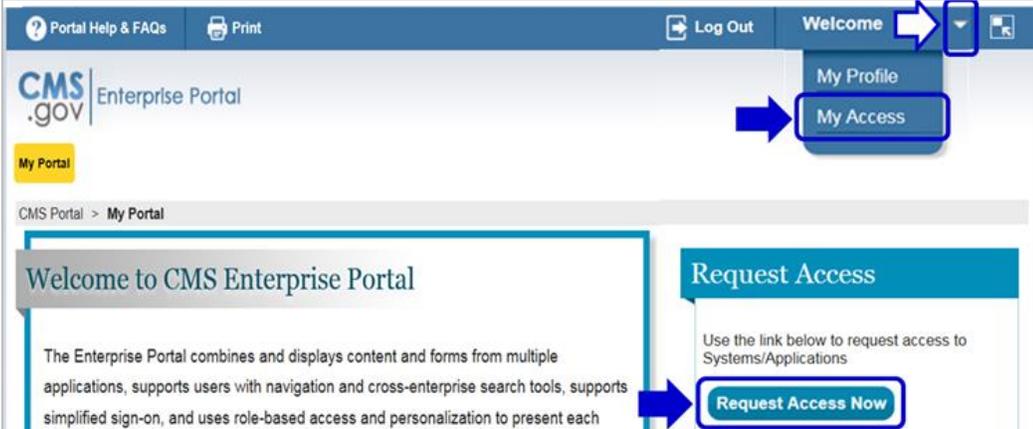
## Viewing Your Role Information

To view your role information, follow Steps 1-5.

	Action
<b>Step 1</b>	<a href="#">Log into the CMS Enterprise Portal.</a>

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

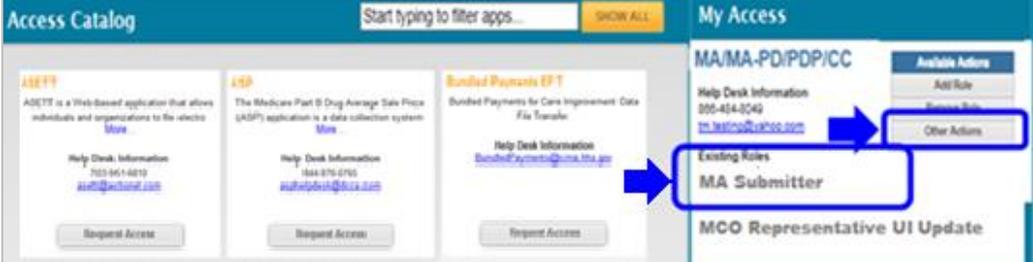
Alternately, you may select **Request Access Now** to continue.



The screenshot shows the CMS Enterprise Portal interface. At the top right, there is a 'Welcome' message with a dropdown arrow. The dropdown menu is open, showing 'My Profile' and 'My Access'. A blue arrow points to the 'My Access' option. Below the main content area, there is a 'Request Access' section with a 'Request Access Now' button. A blue arrow points to this button.

**Step 2** The **Access Catalog**, **My Access**, and **My Pending Requests** sections are displayed. Any existing roles you have are displayed in the **My Access** section.

Select **Other Actions** in the **My Access** section to continue. If there are multiple **Other Actions** options displayed, you may select any “Other Actions” option to continue.



The screenshot shows the CMS Enterprise Portal interface. On the left, there is an 'Access Catalog' section with a search bar and several application cards. On the right, there is a 'My Access' section. The 'My Access' section shows a list of roles, including 'MA Submitter'. A blue arrow points to the 'MA Submitter' role. To the right of the role list, there is an 'Available Actions' section with a button labeled 'Other Actions'. A blue arrow points to this button.

## Action

**Step 3** The **View and Manage My Access** page displays.

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



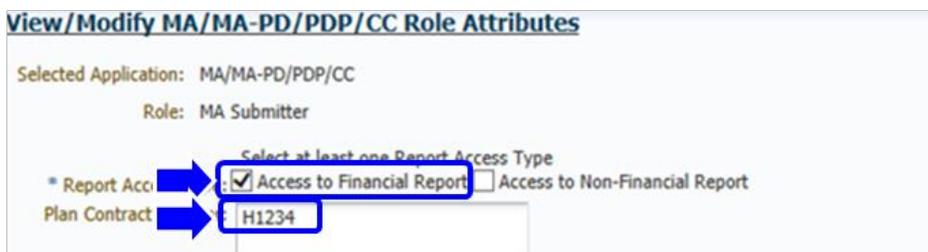
**Step 4** The **View/Modify Role Information** page displays.

All of your roles are displayed in the **My Roles** section. All of your existing role information displays in the **Existing Role Details** section. Select **Modify Attributes** to continue. If there are multiple roles displayed, select **Modify Attributes** for the role you want to add a role attribute to.



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

All of your existing role details are also displayed.



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

## Adding an “Attribute” to Your Role

To add an attribute to your role, continue with Steps 6-8.

Action	
<b>Step 6</b>	Provide the additional attributes needed for your role and enter the reason for the request in the <b>Reason for Request</b> box.

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

### Note

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

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

**View/Modify MA/MA-PD/PDP/CC Role Attributes**

Selected Application: MA/MA-PD/PDP/CC  
Role: MA Submitter

Select at least one Report Access Type

\* Report Access Type:  Access to Final Report  Access to Non-Financial Report

Plan Contract Number: H1111

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request: Needed for the role.

**Step 7** After selecting **Next**, the **View/Modify Role Attributes - Review** page displays.

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

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

### Note

You may select **Cancel** to exit out of the Add a Role Attribute process. New information or changes entered do not save.

## Action

**View/Modify MA/MA-PD/PDP/CC Role Attributes- Review**

Selected Application: MA/MA-PD/PDP/CC  
 Role: MA Submitter

Select at least one Report Access Type  
 Report Access Type:  Access to Financial Report  Access to Non-Financial Report

Plan Contract Number:

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request:

**Step 8** After selecting Submit, the **View/Modify Role Attributes - Acknowledgement** page displays.

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

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

**View/Modify MA/MA-PD/PDP/CC Role Attributes- Acknowledgement**

Your EIDM requests have been successfully submitted.  
 The tracking numbers for your requests are:  
**12844 - ADD - MA Submitter - Plan Contract Number - H1111**

Please use these numbers in all correspondences concerning these requests.  
 You will receive an email after each of your requests has been processed by an Approver.  
 Modifications that do not require an approval are automatically updated to you profile.

## Removing an “Attribute” from Your Role

To remove an attribute from your role, continue with Steps 9-13.

Action	
<b>Step 9</b>	<p>The <b>View/Modify Role Information</b> page displays.</p> <p>All of your roles are displayed in the <b>My Roles</b> section. All of your existing role details are displayed in the <b>Existing Role Details</b> section.</p> <p>Select <b>Modify Attributes</b> to continue. If there are multiple roles displayed, select <b>Modify Attributes</b> for the role you want to modify and remove a role attribute.</p>

### Note

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

**View/Modify MA/MA-PD/PDP/CC Role Information**

Select the link in the Take an Action column to modify the role information in your profile.

My Roles	Existing Role Details	Take an Action
 <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; display: inline-block;">MA Submitter</div>	<p>RACF ID:</p> <p>Report Access Type: Access to Financial Report Plan Contract Number: H1234,H1111</p>	 <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; display: inline-block;">Modify Attributes</div>

<b>Step 10</b>	<p>After selecting <b>Modify Attributes</b>, the <b>View/Modify Role Attributes</b> page displays.</p> <p>All of your existing role details are also displayed.</p>
----------------	---

### Note

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

**View/Modify MA/MA-PD/PDP/CC Role Attributes**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

\* Report Access Type:  Access to Financial Report  Access to Non-Financial Report

Plan Contract Number: 

PDE Mailbox Number:

## Action

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

In the example below, we removed **Plan Contract Number** H1111, entered the reason for the request in the **Reason for Request** box, and selected **Next** to continue.

**View/Modify MA/MA-PD/PDP/CC Role Attributes**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

\* Report Access Type:  Access to Financial Report  Access to Non-Financial Report

Plan Contract Number: H1234

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request: \* Not needed for the role.

Next Cancel

"H1111" has been removed.

**Step 12** After selecting **Next**, the **View/Modify Role Attributes - Review** page displays. Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval.

## Note

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

In the example below, the information is correct. Select **Submit**.

**View/Modify MA/MA-PD/PDP/CC Role Attributes- Review**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

Report Access Type:  Access to Financial Report  Access to Non-Financial Report

Plan Contract Number: H1234

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request: Not needed for the role.

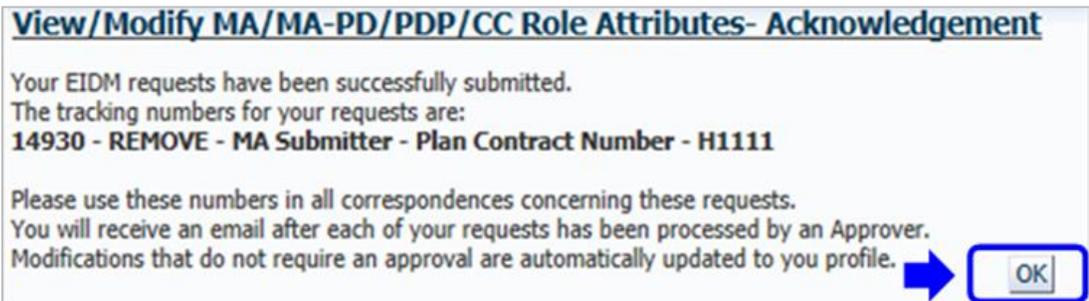
Submit Cancel

**Action**

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

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

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



## How to Replace an Existing Role with Another Role

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

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

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

**To remove an existing role**, follow the step-by-step instructions on **Error! Reference source not found.** below.

**To request access for a new role**, or another role, follow the [How to Request a Role](#)

## How to Remove a Role

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

### Important Note

If you are a DMEPOS Authorized Official and you have no people in your organization, you may use the Remove a Role feature to remove your role from the organization. Since you have no persons in your organization, your organization is also removed when EIDM completes the remove a role process. However, if you have persons that have been approved to access your DMEPOS organization, or you have pending requests for access for your organization, you are not able to remove your Authorized Official role. The reason: The persons in your organization, or applying for access, must have an Authorized Official in the organization.

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

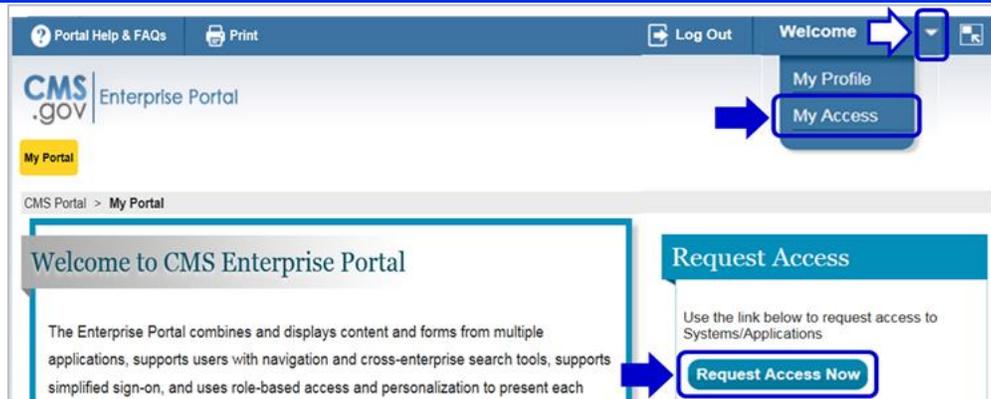
### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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

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

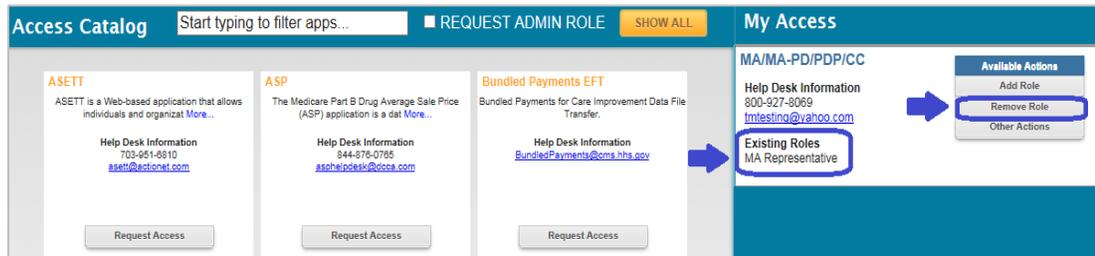
## Action



**Step 2** The **Access Catalog**, **My Access**, and **My Pending Requests** sections are displayed.

Any existing roles you have are displayed in the **My Access** section.

Select **Remove Role** for the application for which you are required to remove a role.



**Step 3** The **Request to Remove Role** page displays.

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

Select **Remove** for the role (backup security official, authorized official, service rep, end user, etc.) you wish to remove.

**Request to Remove MA/MA-PD/PDP/CC Role**

To remove a role from an application, click the Remove a Role link. You can only remove one role at a time. Once a role is removed from an application, you will need to request access again to have it restored.

**My Role Information:**

My Roles	Existing Role Details	Remove a Role
MA Representative	<b>RACF ID:</b> XYZ0 <b>Plan Contract Number:</b> H1111	

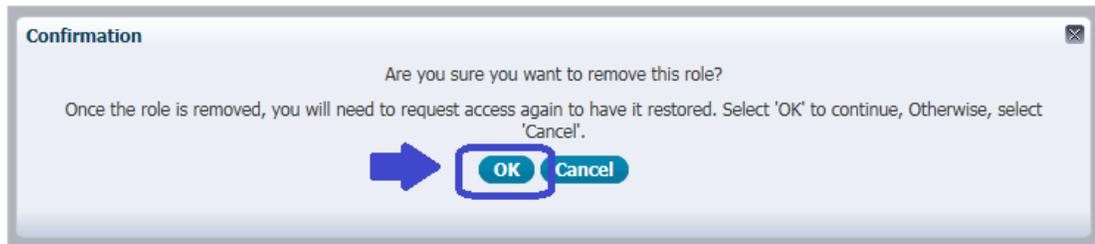
**Cancel**

## Action

- Step 4** A confirmation message displays. The confirmation message asks “Are you sure you want to remove this role?” Review the confirmation message. Select **OK** to continue to remove the role. Select **Cancel** to stop the removal of the role.

**Warning**

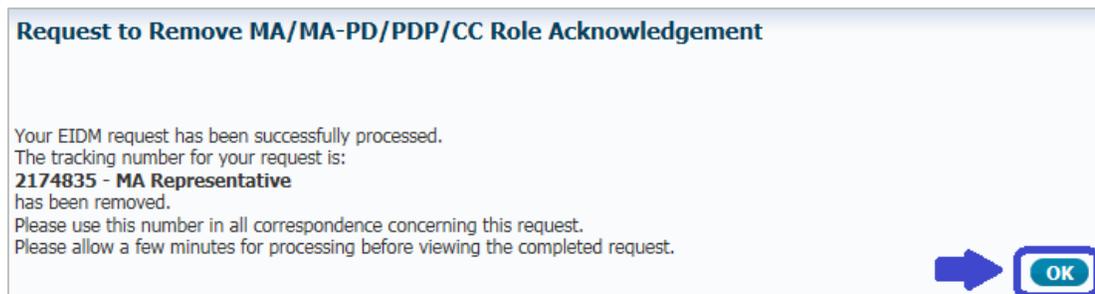
When you select **OK**, the role is removed at that time. You are not able to “undo” the removal.



- Step 5** The **Request to Remove Role Acknowledgement** page displays.

The acknowledgement page displays the tracking number, for future correspondence, the role, and the role attribute or attributes that were removed.

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

**Note**

To request access to a new role, or another role, follow the Step-by-Step instructions on how to request access to an application and a role. Please allow a few minutes for processing the submitted request before requesting access to another role.

## How to Add a Role

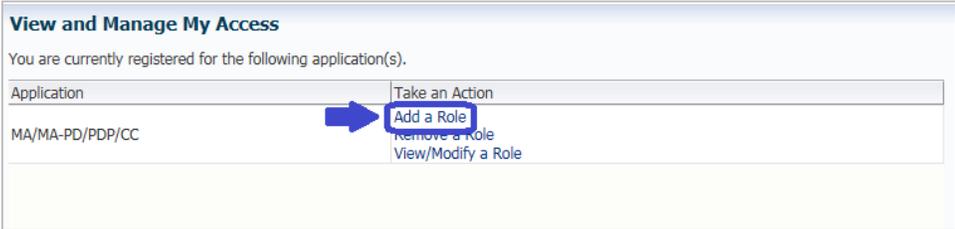
When you currently have a role in an application, and you are required to add another role in the same application, follow the step-by-step instructions below.

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

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

**Action**

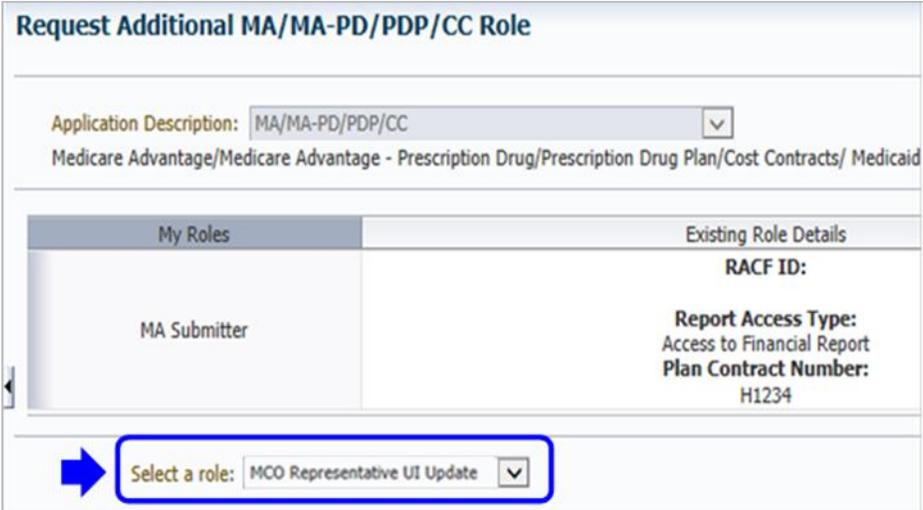
**Step 1** After navigating to the **View and Manage My Access** page, select **Add a Role** for the application you are required to add a role.



**Step 2** The **Request Additional Role** page displays.

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

Select a role (security official, backup security official, authorized official, service rep, end user, etc.) from the **Select a role** drop-down list.



**Action**

**Step 3** The **Request Additional Role** page displays.

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

Select **Next** to continue.

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

In the example below, we added **Plan Contract Number** H1234, entered the reason for the request in the **Reason for Request** box, and selected **Next** to continue.

**Request Additional MA/MA-PD/PDP/CC Role**

Application Description: MA/MA-PD/PDP/CC  
Medicare Advantage/Medicare Advantage - Prescription Drug/Prescription Drug Plan/Cost Contracts/ Medicaid S

My Roles	Existing Role Details
MA Submitter	<b>RACF ID:</b> <b>Report Access Type:</b> Access to Financial Report <b>Plan Contract Number:</b> H1234

Select a role: MCO Representative UI Update

Role Description: The user with this role will be able to enter and correct plan-responsible beneficiary er user interface MARx UI.

Plan Contract Number: H1234

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

\* Reason for Request: Needed for the role.

Next Cancel

## Action

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

Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval.

**Note**

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

**Request Additional MA/MA-PD/PDP/CC Role Review**

Application Description: MA/MA-PD/PDP/CC  
 Medicare Advantage/Medicare Advantage - Prescription Drug/Prescription Drug Plan/Cost Contracts/ Medicaid State Agency

My Roles	Existing Role Details
MA Submitter	<b>RACF ID:</b> <b>Report Access Type:</b> Access to Financial Report <b>Plan Contract Number:</b> H1234

Role Selected: MCO Representative UI Update  
 Role Description: The user with this role will be able to enter and correct plan-responsible beneficiary enrollment related data in the interface MARx UI.

Plan Contract Number: H1234  
 PDE Mailbox Number:  
 RAPS Mailbox Number:  
 RACF ID:  
 Reason for Request: Need to perform role.

Edit Submit Cancel

**Step 5** After selecting **Submit**, the **Request Additional Role Review Acknowledgement** page displays. It displays the tracking number for the request and the role attributes requested. Select **OK** to close the acknowledgement page.

**Request Additional MA/MA-PD/PDP/CC Role Review Acknowledgement**

Your EIDM request has been successfully submitted.  
 The tracking number for your requests is:  
**12649 - Plan Contract Number - H1234**

Please use this number in all correspondence concerning this request.  
 You will receive an email once your request has been processed.

OK

## How to Unlock Your Account

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

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

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

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

### Action

- Step 1** Navigate to <https://portal.cms.gov>. The **CMS Enterprise Portal** page displays as illustrated below.

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

**Action**

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

The screenshot shows a 'Terms and Conditions' page with a teal header. Below the header, there is text including 'OMB No.0938-1236 | Expiration Date: 04/30/2017 | Paperwork Reduction Act'. The main body of text explains that the user is accessing a U.S. Government information system and provides details about privacy and data handling. At the bottom, there are two buttons: 'I Accept' and 'Decline'. A blue arrow points to the 'I Accept' button, which is also highlighted with a blue rounded rectangle.

**Step 4** The **Unlock My Account** page displays.

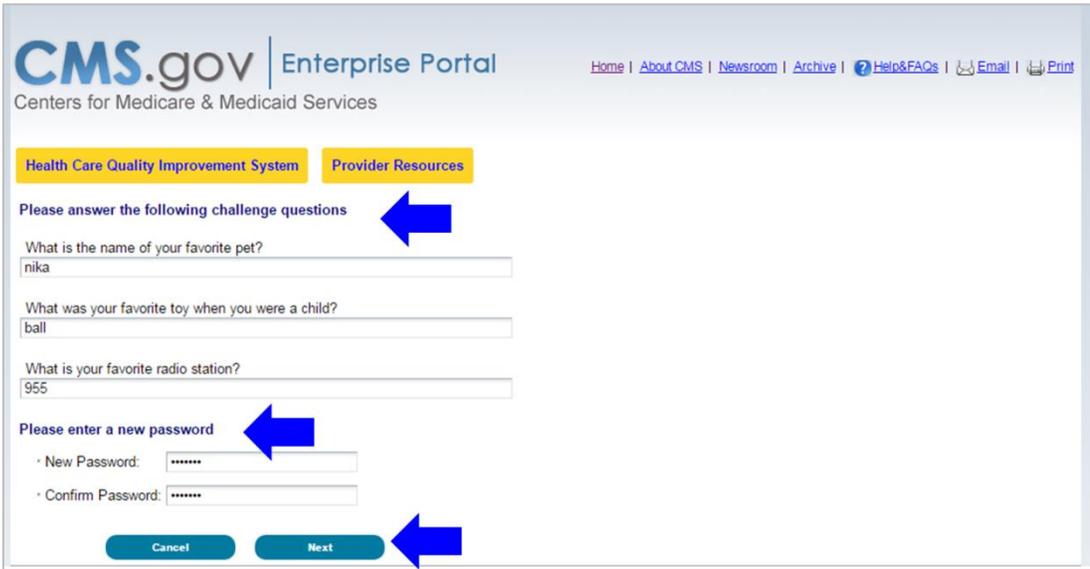
The screenshot shows the CMS.gov Enterprise Portal. The header includes the CMS.gov logo and 'Enterprise Portal' text, along with navigation links like 'Home', 'About CMS', 'Newsroom', 'Archive', 'Help&FAQs', 'Email', and 'Print'. Below the header, there are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. The main heading is 'Unlock My Account'. Below this, there is a message: 'Your account has been locked. You could unlock your account and reset your password by providing your User ID and answering your challenge questions.' There is a text input field for 'User ID' and two buttons: 'Cancel' and 'Next'.

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

This screenshot is similar to the previous one, but the 'User ID' input field now contains the text 'mapia888'. A blue arrow points to the 'Next' button, which is highlighted with a blue rounded rectangle.

**Action**

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



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

The **CMS Enterprise Portal** page displays for you to log into your account.



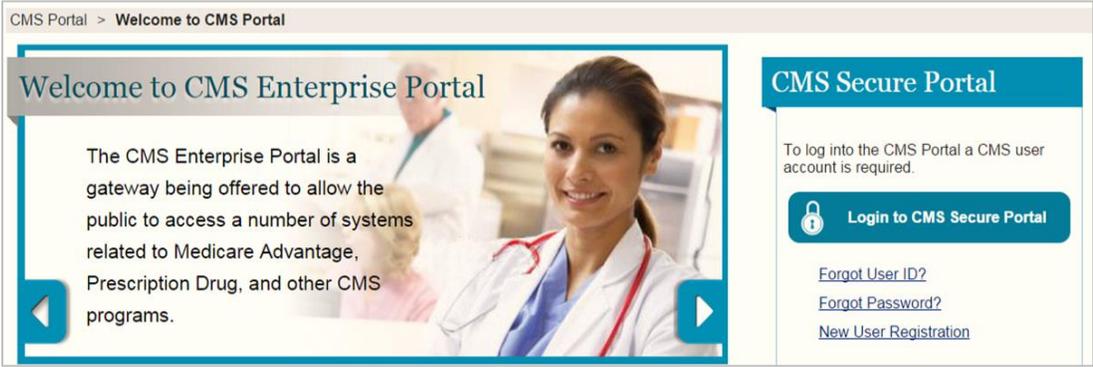
## 8. Changing Your User Profile

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

1. [Forgot Your User ID?](#)
2. [Forgot Your Password?](#)
3. [How to View Your Profile.](#)
4. [How to Change Your Password.](#)
5. [How to Change Your E-mail Address.](#)
6. [How to Change Your Security Challenge Questions and Answers.](#)
7. [How to Change Your Phone Number.](#)
8. [How to Change Your Home Address.](#)

### Forgot Your User ID?

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

Action	
<b>Step 1</b>	<p>Navigate to <a href="https://portal.cms.gov">https://portal.cms.gov</a>. The <b>CMS Enterprise Portal</b> page displays as illustrated below.</p> 

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



## Action

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

**Note**

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

**Please enter the following information**

\* First Name :

\* Last Name :

\* E-mail Address :

\* Zip code :

\* Date of Birth:

MM DD YYYY



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

Select **OK** to close the page.

**Forgot UserId**

Your information has been successfully verified. An E-mail containing your User ID has been sent to the E-mail Address on record.

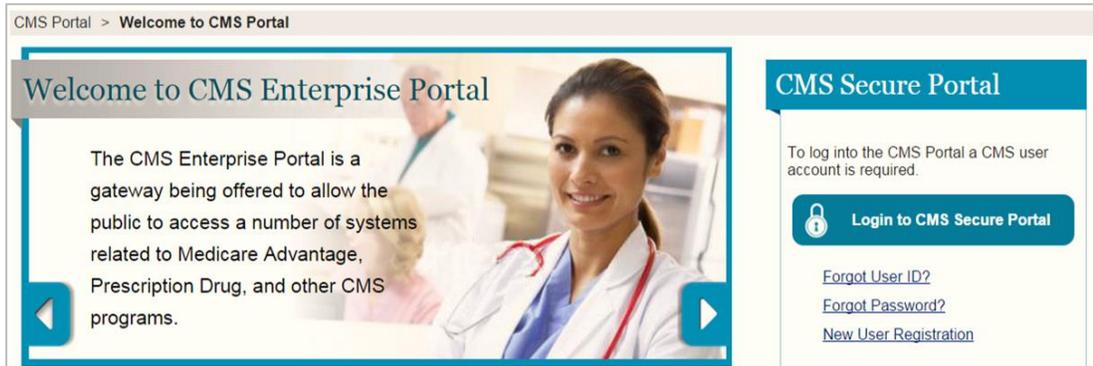


## Forgot Your Password?

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

### Action

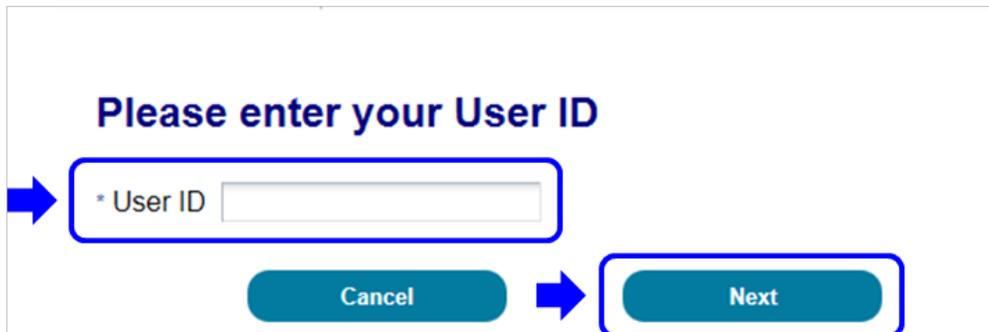
**Step 1** Navigate to <https://portal.cms.gov>. The **CMS Enterprise Portal** page displays as illustrated below.



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



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



## Action

**Step 4** Provide the answers to the challenge questions displayed.

Enter a new password. Re-enter the same password for “**Confirm Password**” and select **Next** to complete the Forgot Password process.

## Notes

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

**Please answer the following challenge questions**

What is a relative's telephone number that is not your own?

What is the name of your favorite pet?

What is your favorite radio station?

**Please enter a new password**

\* New Password:

\* Confirm Password:

Cancel Next

**Step 5** After selecting **Next**, the **Forgot Password** acknowledgement page displays. The page displays that the password has been changed and a confirmation e-mail has been sent to the e-mail address on record.

Select **OK** to close the page.

## Note

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

**Forgot Password**

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

OK

## How to View Your Profile

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

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

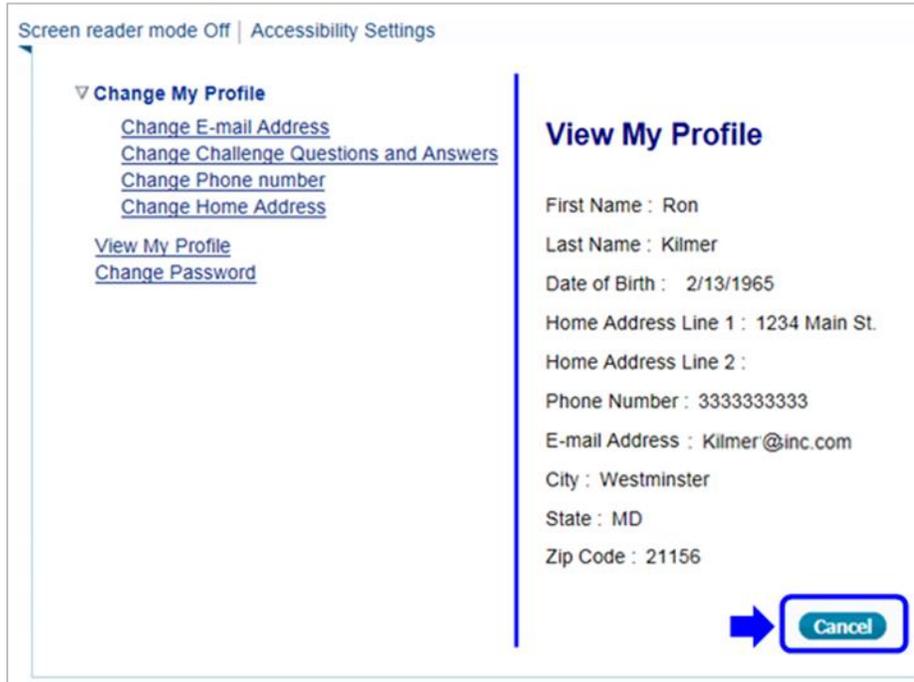
Select the down arrow icon that appears next to your name at the top of page. Then select **My Profile** from the drop-down list to continue.



### Step 2

The **View My Profile** page displays.

After viewing your profile information, select **Cancel** to close the page.



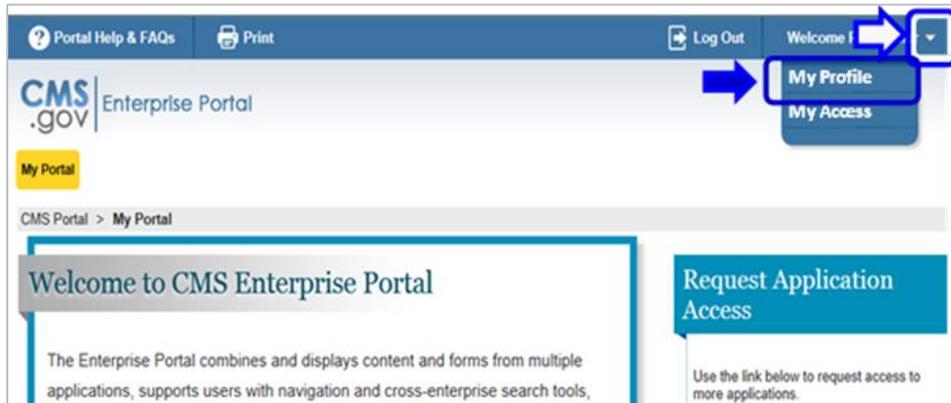
## How to Change Your Password

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

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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



**Step 2** The **View My Profile** page displays.

Select **Change Password**.



## Action

**Step 3** The **Change Password** page displays.

Enter your old password.

Create and enter a new password of your choice in the **New Password** field.

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

## Notes

- EIDM displays instructions on what you are required to include in your password.
- Some roles may require you to enter an 8-character password for your new password. For example, if you have a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to create and enter an 8-character password for your new password. When you are required to enter an 8-character password, an error message displays when a password has been entered that is longer than 8 characters.
- You may select Cancel at any time to exit out of the Change Password process. New information or changes entered do not save.

The screenshot shows the 'Change Password' page with three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. Each field contains a series of dots representing masked characters. Below the fields are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted with a blue border and a blue arrow pointing to it from the 'Cancel' button.

**Step 4** The **Change Password** acknowledgement page displays.

It shows that the password has been changed, a confirmation e-mail has been sent to the e-mail address on record, and you need to logout and login with your new password.

Select **OK** to close the page.

The screenshot shows the 'Change Password' acknowledgement page. The text reads: 'Your password has been successfully changed. A confirmation E-mail has been sent. You will need to logout and login with your new password to access the system. Select 'OK' to login using your new password.' Below the text is an 'OK' button, which is highlighted with a blue border and a blue arrow pointing to it from the left.

## How to Change Your E-mail Address

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

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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



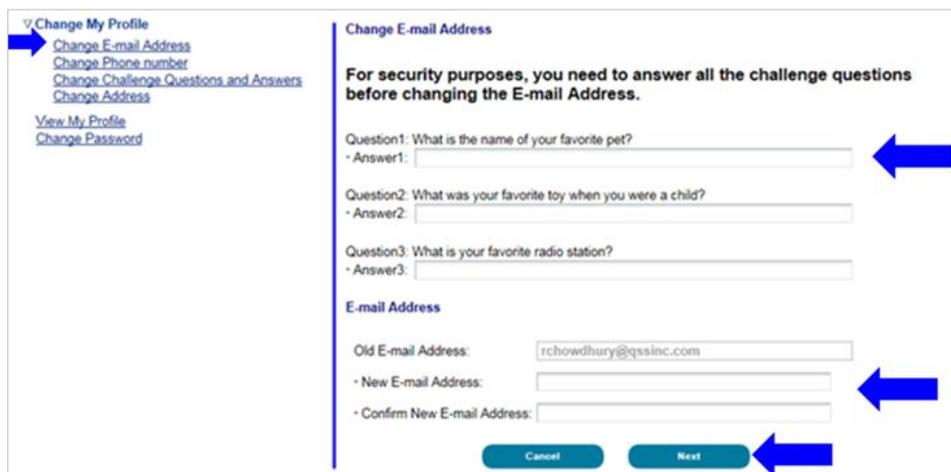
**Step 2** The **View My Profile** page displays.

Select **Change E-mail Address**. Provide the answers to the challenge questions displayed.

Enter your new e-mail address in the **New E-mail Address** field and then re-enter the e-mail address in the **Confirm New E-mail Address** field.

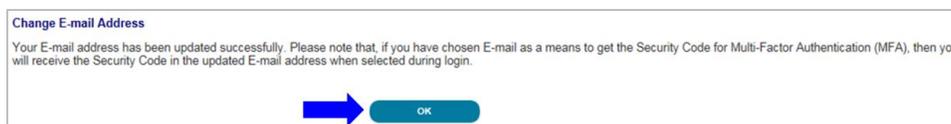
Select **Next** to complete the Change e-mail process.

**Note**  
You may select **Cancel** at any time to exit out of the Change Password process. New information or changes entered do not save.



**Step 3** The **Change E-mail Address** acknowledgement page displays.

It shows that the e-mail address has been changed. In addition, the system sends a confirmation e-mail to both the old and new addresses. Select **OK** to close the page.



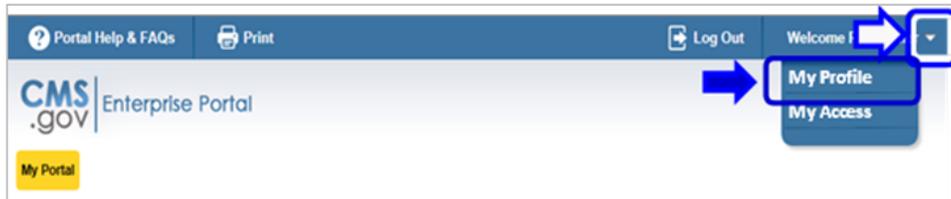
## How to Change Your Security Challenge Questions and Answers

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

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

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



**Step 2** The **View My Profile** page displays.

Select **Change Challenge Questions and Answers**. Enter your **User ID** and **Password** and select **Next**.

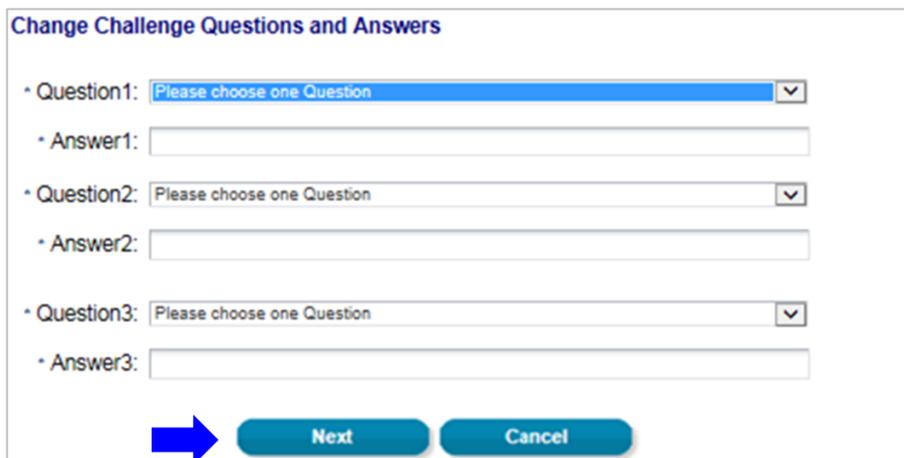


**Step 3** The **Change Challenge Questions and Answers** page displays.

Select a question and then provide an answer of your choosing. Continue until all three challenge questions have been selected and answered. Select **Next**.

#### Note

You may select **Cancel** at any time to exit out of the Change Challenge Questions process. New information entered do not save.

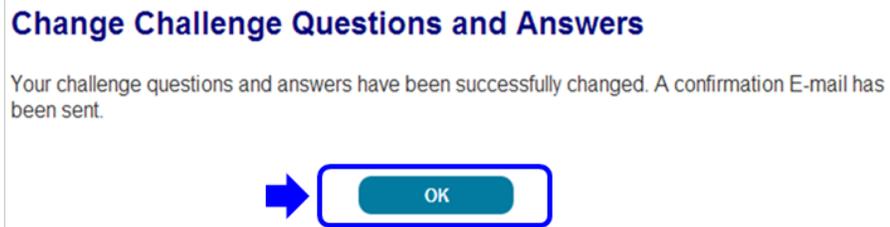


**Action**

**Step 4** The **Change Challenge Questions and Answers** acknowledgement page displays.

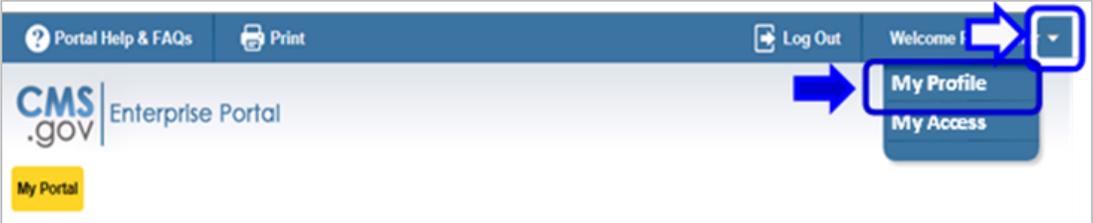
It shows that the challenge questions and answers have been changed and a confirmation e-mail has been sent to the e-mail address on record.

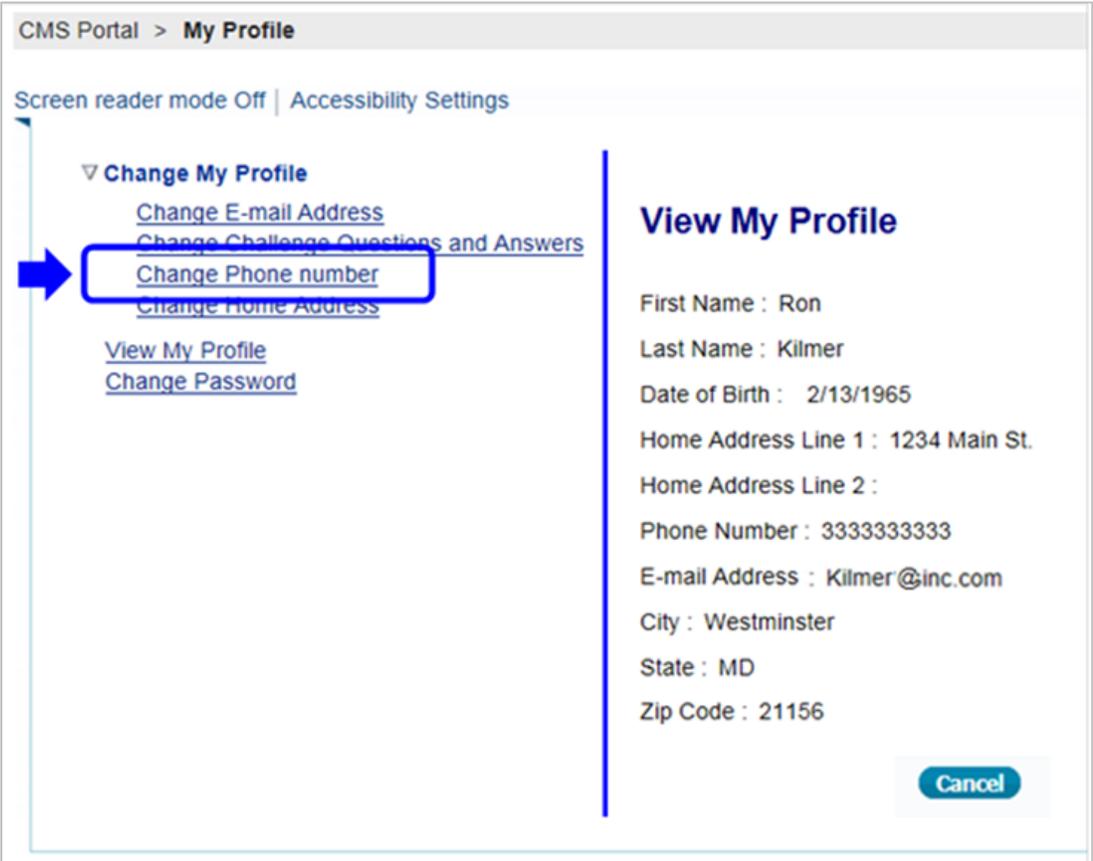
Select **OK** to close the page.



## How to Change Your Phone Number

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

Action	
<b>Step 1</b>	<p><a href="#">Log into the CMS Enterprise Portal.</a></p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Profile</b> from the drop-down list to continue.</p> 

<b>Step 2</b>	<p>The <b>View My Profile</b> page displays.</p> <p>Select <b>Change Phone number</b>.</p> 
---------------	--

CMS Portal > My Profile

Screen reader mode Off | Accessibility Settings

▼ **Change My Profile**

- [Change E-mail Address](#)
- [Change Challenge Questions and Answers](#)
- [Change Phone number](#)
- [Change Home Address](#)
- [View My Profile](#)
- [Change Password](#)

### View My Profile

First Name : Ron

Last Name : Kilmer

Date of Birth : 2/13/1965

Home Address Line 1 : 1234 Main St.

Home Address Line 2 :

Phone Number : 3333333333

E-mail Address : Kilmer@inc.com

City : Westminster

State : MD

Zip Code : 21156

[Cancel](#)

## Action

**Step 3** The **Change Phone number** page displays.

The current phone number on record for you displays in the **Phone Number** field.

Provide the answers to all of the challenge questions displayed.

Enter your new phone number in the Phone Number field.

Select **Next** to continue.

**Note**

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

**Change Phone number**

**For security purposes, you need to answer all the challenge questions before changing the Phone Number.**

Question1: What is a relative's telephone number that is not your own?  
- Answer1:

Question2: What is the name of your favorite pet?  
- Answer2:

Question3: What is your favorite radio station?  
- Answer3:

\* Phone Number:

**Step 4** The **Change Phone number** acknowledgement page displays.

It shows that the phone number has been changed. In addition, the system sends a confirmation e-mail to the address on record.

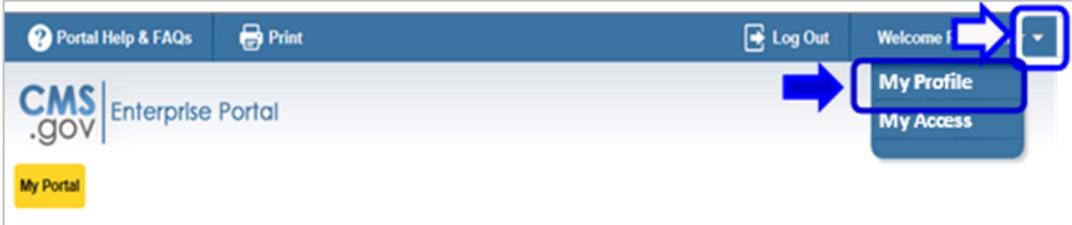
Select **OK** to close the page.

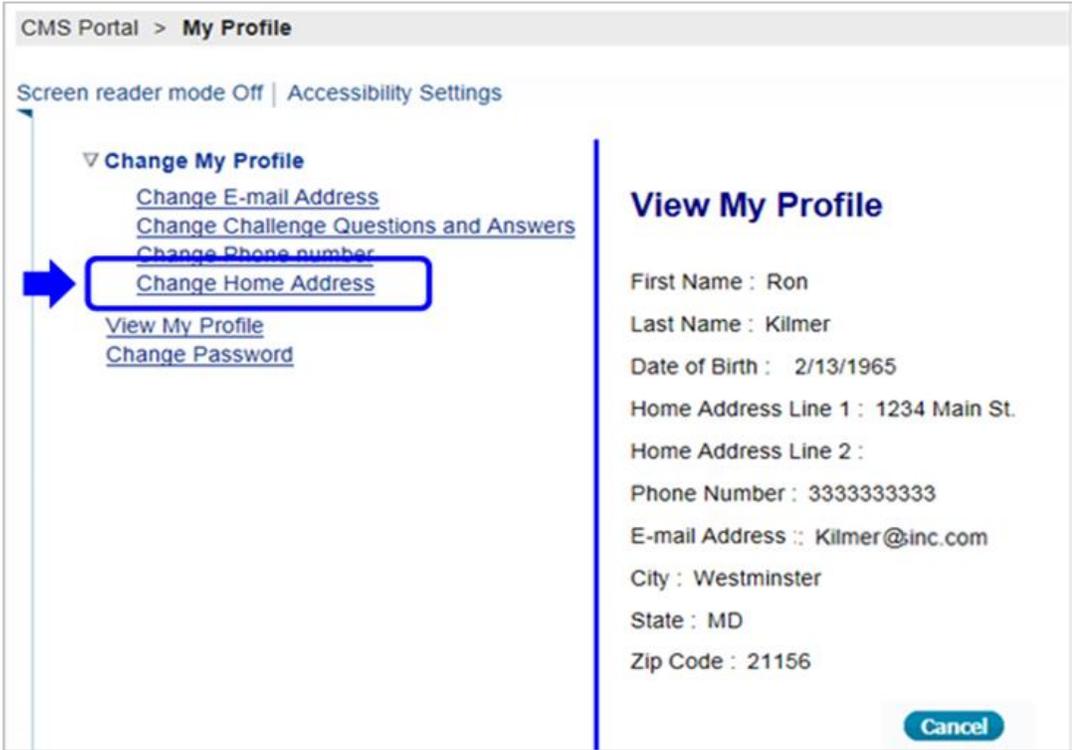
**Change Phone number**

Your Phone number has been updated successfully.

## How to Change Your Home Address

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

Action	
<b>Step 1</b>	<p><a href="#">Log into the CMS Enterprise Portal.</a></p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Profile</b> from the drop-down list to continue.</p> 

<b>Step 2</b>	<p>The <b>View My Profile</b> page displays.</p> <p>Select <b>Change Home Address</b>.</p> 
---------------	--

CMS Portal > My Profile

Screen reader mode Off | Accessibility Settings

▼ Change My Profile

- [Change E-mail Address](#)
- [Change Challenge Questions and Answers](#)
- [Change Phone number](#)
- [Change Home Address](#)
- [View My Profile](#)
- [Change Password](#)

**View My Profile**

First Name : Ron  
 Last Name : Kilmer  
 Date of Birth : 2/13/1965  
 Home Address Line 1 : 1234 Main St.  
 Home Address Line 2 :  
 Phone Number : 3333333333  
 E-mail Address :: Kilmer@inc.com  
 City : Westminster  
 State : MD  
 Zip Code : 21156

Cancel

**Action**

**Step 3** The **Change Home Address** page displays.

The current home address on record displays in the **Home Address** field. Provide the answers to all of the challenge questions displayed.

Enter your new home address information in the **Home Address** field.

Select **Next** to complete the **Change Home Address** process.

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

### Change Home Address

**For security purposes, you need to answer all the challenge questions before changing the Home Address.**

Question1: What is a relative's telephone number that is not your own?  
- Answer1:

Question2: What is the name of your favorite pet?  
- Answer2:

Question3: What is your favorite radio station?  
- Answer3:

- Home Address 1:

Home Address 2:

- City:

- State:

- Zip Code:

Zip Code Extension:

**Step 4** The **Change Home Address** acknowledgement page displays.

It shows that the home address has been changed. In addition, the system sends a confirmation e-mail to the address on record.

Select **OK** to close the page.

### Change Home Address

**Your Home address has been updated successfully.**

# 9. Appendices

## Appendix A: Accessing EIDM in 508 Accessibility Mode

Section 508 is a federal law that requires agencies to provide people with disabilities equal access to electronic information and data comparable to those who do not have disabilities, unless doing so would impose an undue burden on the agency. The Section 508 standards are the technical requirements and criteria used to determine whether the agency is meeting the requirements of this law.

This section outlines the steps users can take to access EIDM in 508 Accessibility Mode.

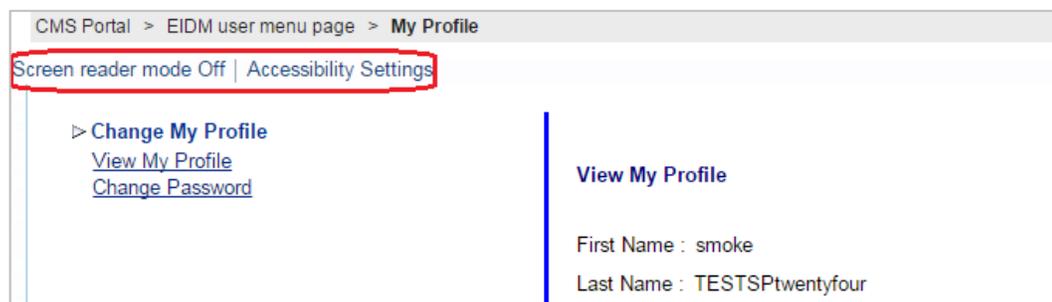
### Action

#### Step 1 [Log into the CMS Enterprise Portal](#)

Locate the **Welcome <First Name> <Last Name>** drop-down list at the top-right corner of the page and select **My Profile**.



#### Step 2 The 'View My Profile' page displays. Locate the "Screen Reader Mode [Off/On]" and "Accessibility Settings" links in the top-left corner.



#### Step 3 Click **Screen reader mode Off** to toggle it to **Screen reader mode On**.

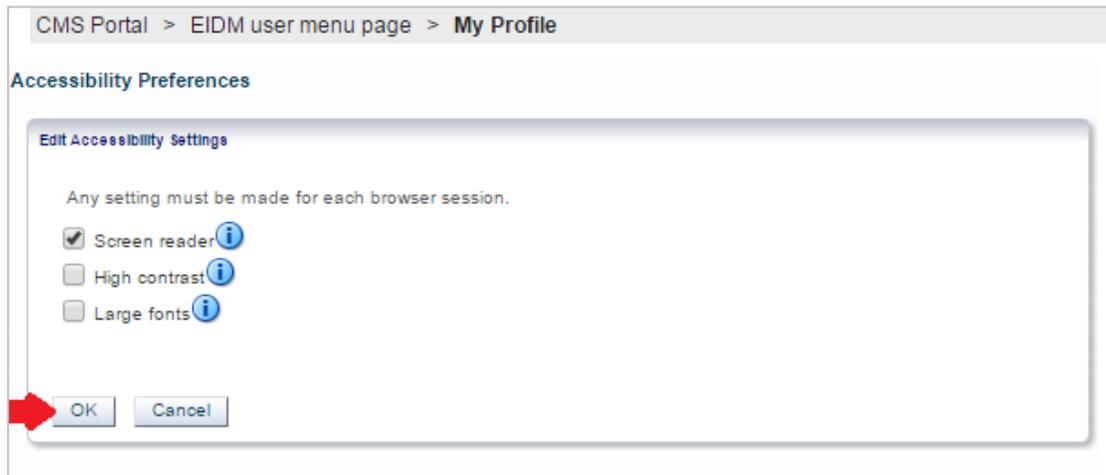


#### Step 4 Click **Accessibility Settings** to access more options.



## Action

**Step 5** The 'Accessibility Preferences' page displays. Make your selections and click **OK**.



The screenshot shows a web browser window with the breadcrumb path "CMS Portal > EIDM user menu page > My Profile". Below this is a section titled "Accessibility Preferences". Inside this section is a dialog box titled "Edit Accessibility Settings". The dialog box contains the text "Any setting must be made for each browser session." and three checkboxes: "Screen reader" (checked), "High contrast" (unchecked), and "Large fonts" (unchecked). Each checkbox has a small blue information icon to its right. At the bottom of the dialog box are two buttons: "OK" and "Cancel". A red arrow points to the "OK" button.

## Appendix B: Application Help Desk Information

Application (Help Desk Name)	Phone	E-mail
<b>Agents and Brokers (FFM - A/B)</b> (XOSC)	855-267-1515	<a href="mailto:cms_feps@cms.hhs.gov">cms_feps@cms.hhs.gov</a>
<b>ASETT</b> (ASETT Help Desk)	703-951-6810	<a href="mailto:asett@actionet.com">asett@actionet.com</a>
<b>Bundled Payments EFT</b> (Bundled Payments Help Desk)	N/A	<a href="mailto:BundledPayments@cms.hhs.gov">BundledPayments@cms.hhs.gov</a>
<b>CERRS</b> (Cognosante Help Desk)	703-206-6199	<a href="mailto:servicedesk@cognosante.com">servicedesk@cognosante.com</a>
<b>CJR</b> (IBOSC Help Desk)	844-711-2664 (Option 1)	<a href="mailto:CJRSupport@cms.hhs.gov">CJRSupport@cms.hhs.gov</a>
<b>COB</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>Connexion</b> (CBIC Help Desk)	877-577-5331	<a href="mailto:CBIC.admin@palmettogba.com">CBIC.admin@palmettogba.com</a>
<b>CPC (Innovation Center HD)</b> (IC Help Desk)	800-381-4724	<a href="mailto:CPCiSupport@Telligen.org">CPCiSupport@Telligen.org</a>
<b>CPMS</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>CSR</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>DBidS/ DMEPOS</b> (CBIC Help Desk)	877-577-5331	<a href="mailto:CBIC.admin@palmettogba.com">CBIC.admin@palmettogba.com</a>
<b>ECRS</b> (EDI Help Desk)	646-458-6740	<a href="mailto:ECRSHelp@EHMedicare.com">ECRSHelp@EHMedicare.com</a>
<b>ELMO</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>EPPE</b> (EPPE Help Desk)	844-377-3382	<a href="mailto:eppe@cms.hhs.gov">eppe@cms.hhs.gov</a>
<b>e-RPT</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>ESD</b> (ESD Application Support)	TBD	TBD
<b>FCSO aka The Spot</b> (FCSO Help Desk)	855-416-4199	<a href="mailto:FCSSpotHelp@FCSO.com">FCSSpotHelp@FCSO.com</a>
<b>FFSDCS</b> (ASP Help Desk)	844-876-0765	<a href="mailto:aspHelpDesk@dcca.com">aspHelpDesk@dcca.com</a> <a href="mailto:CLFShelpdesk@dcca.com">CLFShelpdesk@dcca.com</a>

<b>Application (Help Desk Name)</b>	<b>Phone</b>	<b>E-mail</b>
<b>Gentran</b> (Gentran Support)	N/A	<a href="mailto:Gentran-support@cms.hhs.gov">Gentran-support@cms.hhs.gov</a>
<b>HDT</b> (MCARE/HDT Help Desk)	866-324-7315	<a href="mailto:mcare@cms.hhs.gov">mcare@cms.hhs.gov</a>
<b>HHVBP</b> (IBOSC Help Desk)	844-280-5628	<a href="mailto:hhvbpquestion@cms.hhs.gov">hhvbpquestion@cms.hhs.gov</a>
<b>HIOS</b> (XOSC)	855-267-1515	<a href="mailto:cms_feps@cms.hhs.gov">cms_feps@cms.hhs.gov</a>
<b>IC (Innovation Center)</b> (Actionet Help Desk)	N/A	<a href="mailto:CICDIMServiceDesk@actionet.com">CICDIMServiceDesk@actionet.com</a>
<b>ISV</b> (ISV Help Desk)	N/A	<a href="mailto:ISV-Support@cms.hhs.gov">ISV-Support@cms.hhs.gov</a>
<b>MACPro</b> (MACPro Help Desk)	301-547-4688	<a href="mailto:MACPro_HelpDesk@cms.hhs.gov">MACPro_HelpDesk@cms.hhs.gov</a>
<b>MARx</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>MCU</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>MDR</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>MED</b> (EUS Help Desk)	866-484-8049	<a href="mailto:eussupport@cgi.com">eussupport@cgi.com</a>
<b>MLMS</b> (MLMS Help Desk)	N/A	<a href="mailto:MLMSHelp_Desk@cms.hhs.gov">MLMSHelp_Desk@cms.hhs.gov</a>
<b>MyCGS</b> (MyCGS Help Desk)	866-270-4909	<a href="mailto:cgs.dme.mac.email.inquiries@cgsadmin.com">cgs.dme.mac.email.inquiries@cgsadmin.com</a>
<b>Novitas</b> (Novitas Help Desk)	855-880-8424	<a href="mailto:WebsiteEDI@novitas-solutions.com">WebsiteEDI@novitas-solutions.com</a>
<b>Open Payments</b> (Open Payments Help Desk)	855-326-8366	<a href="mailto:OpenPayments@cms.hhs.gov">OpenPayments@cms.hhs.gov</a>
<b>Physicians Value aka PV</b> (PV Help Desk)	888-734-6433	<a href="mailto:pvHelp_Desk@cms.hhs.gov">pvHelp_Desk@cms.hhs.gov</a>
<b>PMDA</b> (PMDA Help Desk)	443-775-3226	<a href="mailto:pmda1115_cvp_help@cvpcorp.com">pmda1115_cvp_help@cvpcorp.com</a>
<b>PQRS</b> (QualityNet Help Desk)	866-288-8912	<a href="mailto:qnet-hd-support-queue@hcqis.org">qnet-hd-support-queue@hcqis.org</a>
<b>PS&amp;R/STAR</b> (EUS Help Desk)	866-484-8049	<a href="mailto:eussupport@cgi.com">eussupport@cgi.com</a>

<b>Application</b> <i>(Help Desk Name)</i>	<b>Phone</b>	<b>E-mail</b>
<b>QARM</b> <i>(ESRD Help Desk)</i>	866-288-8912	<a href="mailto:QNETSupport-ESRD@hcqis.org">QNETSupport-ESRD@hcqis.org</a>
<b>QMAT</b> <i>(CEC Help Desk)</i>	888-734-6433	<a href="mailto:ESRD-CMMI@cms.hhs.gov">ESRD-CMMI@cms.hhs.gov</a>
<b>Salesforce</b> <i>(CMS Salesforce and Force.com Information Center)</i>	888-734-6433 <i>(Option 5)</i>	<a href="mailto:CMMIForceSupport@cms.hhs.gov">CMMIForceSupport@cms.hhs.gov</a>
<b>SERTS</b> <i>(XOSC)</i>	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>SERVIS</b> <i>(XOSC)</i>	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>SHOP/SHIM</b> <i>(SHOP Call Center/Support)</i>	800-706-7893	N/A
<b>SLS</b> <i>(SLS Support)</i>	N/A	<a href="mailto:sls@navahq.com">sls@navahq.com</a>
<b>T-MSIS</b> <i>(T-MSIS Help Desk)</i>	N/A	<a href="mailto:T-MSIS_HelpDesk@cms.hhs.gov">T-MSIS_HelpDesk@cms.hhs.gov</a>
<b>UCM</b> <i>(UCM Help Desk)</i>	844-826-3375	<a href="mailto:ucmsupport@cms.hhs.gov">ucmsupport@cms.hhs.gov</a>
<b>VMS Client Letter</b> <i>(GDIT Technical Help Desk)</i>	443-275-6946 <i>(Option 2)</i>	<a href="mailto:THD@gdit.com">THD@gdit.com</a>
<b>zONE</b> <i>(XOSC)</i>	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>

Table 1: Application Help Desk Information

## Appendix C: Acronyms

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

Acronym	Literal Translation
HETS	HIPAA Eligibility Transaction System
HETS	HIPAA Eligibility Transaction System
HPG	HIPAA Eligibility Transaction System (HETS) Provider Graphical User Interface (GUI)
IDP	Identity Proofing
IVR	Interactive Voice Response
LBN	Legal Business Name
LOA	Level of Assurance
LSA	Local System Administrator
MA	Medicare Advantage
MAC	Medicare Administrative Contractor
MAPD	Medicare Advantage - Prescription Drug
MARx	Medicare Advantage and Prescription Drug System
MCO	Medicaid Managed Care Organization
MDR	Medicaid Drug Rebate
MED	Medicare Exclusion Database
MFA	Multi-Factor Authentication
MMP	Medicare and Medicaid Plan
MSP	Medicare Secondary Payer
NPI	National Provider Identifier
OOW	Out-of-Wallet
OTP	One-time Password
PDE	Prescription Drug Event
PDP	Prescription drug Plan
POS	Point Of Service
POS	Point of Sale
POSFE	Point-of-Sale Facilitated Enrollment
PQIP	Physician Quality Initiatives Portal
PQRS	Physician Quality Reporting System
PS&R	Provider Statistical and Reimbursement
PTAN	Provider Transaction Access Number
PV	Physician Value
PY	Payment Year
QRUR	Quality and Resource Use Report

Acronym	Literal Translation
<b>RACF</b>	Resource Access Control Facility
<b>RAPS</b>	Risk Adjustment Processing System
<b>RIDP</b>	Remote Identity Proofing
<b>SHIP</b>	State Health Insurance Plans
<b>SMS</b>	Short Message Service
<b>SPAP</b>	State Pharmacy Assistance Programs
<b>SR</b>	Service Request
<b>SSN</b>	Social Security Number
<b>STAR</b>	System for Tracking Audit and Reimbursement
<b>TIN</b>	Taxpayer Identification Number
<b>TT</b>	Trouble Ticket
<b>UI</b>	User Interface
<b>VMS</b>	ViPS Medicare System
<b>XLC</b>	eXpedited Life Cycle
<b>XLS</b>	Microsoft Excel Workbook

Table 2: Acronyms