

Centers for Medicare & Medicaid Services

|  |
| --- |
| **CMS Enterprise Portal Quick Reference Guide (QRG)**  **New Users Completing RIDP and MFA** |
| January 13, 2017  Version 1.4 Final |

**Table of Contents**

[1. Introduction 2](#_Toc459376001)

[2. Step-by-Step Instructions to Request a Role 3](#_Toc459376002)

[3. Step-by-Step Instructions to Complete RIDP 6](#_Toc459376003)

[4. Step-by-Step Instructions to Set Up MFA 9](#_Toc459376004)

# Introduction

This guide provides step-by-step instructions on how to request a role to access ***<Your application name>*** using an existing CMS Enterprise Portal account.

***Note****: If you already have an active CMS Enterprise Portal account with a* ***<Your Application name>*** *role or have been thorough Remote Identity Proofing (RIDP), refer to the document ‘EIDM Quick Reference Guide - Existing Users Adding MFA to Their Existing Application Role’:*

Depending on the application role that you request, the system might redirect you for identity proofing. You might also be required to register for Multi-Factor Authentication (MFA) for added security. Listed below are a few points to keep in mind prior to going through the Remote Identity Proofing (RIDP) process:

1. You will be required to provide personal information such as Name, Date of Birth, Address, etc. exactly as recorded on either your driver’s license or any Government ID.
2. As part of RIDP, the system will require answers to questions related to your personal and financial information. Please have your personal and credit information handy prior to attempting RIDP.
3. Depending on the MFA option you choose to register, you may need access to download/install software on your computer/phone *(****Note****: Your phone device should be able to receive Short Message Service (SMS) and you should have a valid e-mail address)*

# **Step-by-Step Instructions to Request a Role**

Please follow each step listed below for requesting an application role.

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Go to <https://portal.cms.gov/>and select **Login to CMS Secure Portal**on the CMS Enterprise Portal.   ***Note:*** *The CMS Enterprise Portal supports the following browsers: Internet Explorer 11, Firefox, Chrome, and Safari*. | Portal Landing Page |
| 1. Read the ‘Terms and Conditions’ pageand select **I Accept**to continue. | I Accept the Terms and Conditions |
| 1. Enter your **User ID** and select **Next**. | Enter User ID |
| 1. Enter your **Password** and select **Log In**. | Enter password and select Log In. |
| 1. Select **Request Access Now** in the ‘Request Access’section to being the process of requesting a new user role.   ***Note:*** *You may also locate the ‘Welcome <First> <Last>’ drop-down list in the top-right corner of the page and select* ***My Access*** *to begin the process of requesting a new user role.* | Request Access Now link |
| 1. Find your application in the Access Catalog and select **Request Access** on the application tile.   ***Note****: The* ***Access Catalog*** *list is in alphabetical order. Scroll down until you find your application or enter the first few letters of your application in the* ***Access Catalog*** *text box to narrow down the selection criteria.*  *The applications are listed by their acronym and not their full name. You must use the acronym of the application to search.* | Access Catalog |
| 1. Select the application role you want to request from the **Select a Role** drop-down. Select **Next** to continue.   ***Note****: The* ***Next*** *button will be visible after making a selection from the* ***Select a Role*** *drop-down list and providing the required information.* | Select a Role drop-down |

# **Step-by-Step Instructions to Complete RIDP**

This section outlines the steps to complete the identity verification process, which verifies your identity by asking questions based on your personal and credit report information. Please follow each step listed below unless otherwise noted.

***Note****: If you fail to complete the RIDP verification within x minutes, you will lose all the information you entered and will need to start the process again.*

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Select **Next** to start the Identity Verification process. | Request New Application Access |
| 1. Read the Terms and Conditions. Select the ‘**I agree to the terms and conditions’** checkbox and select **Next**.   ***Note****: The ‘Next’ button will be enabled only after checking the ‘I agree to the terms and conditions’ checkbox.* | Terms and Conditions |
| 1. Confirm your E-mail Address and enter your Social Security Number. After verifying the pre- populated information, select **Next** to continue the identity verification process.   ***Note****: You will be required to enter your Social Security Number if MFA is mandatory for your role.* | New User Registration |
| 1. Provide an answer to each question under the Verify Identity section. Select **Next** to continue.   Select **Cancel** to terminate the request and return to the ‘View and Manage My Access’ page  ***Note****: Verify Identity questions are provided from Experian based on the information provided in step 3.* | Verify Identity |
| 1. Remote Identity Proofing is now complete. Select **Next** to proceed.   ***Note****: If you do not pass RIDP, please contact Experian to verify the information they have on file is correct.* | Complete Remote Identity Proofing |

# **Step-by-Step Instructions to Set Up MFA**

MFA is not mandatory for all users. If your role is identity proofed to a level utilizing MFA, please follow each step listed below unless otherwise noted.

MFA is a security mechanism that is implemented to verify the legitimacy of a person or transaction.

MFA requires you to provide more than one form of verification in order to prove your identity. MFA registration is required only once when you are requesting a role, but will be verified every time you log into the CMS Enterprise Portal.

During the MFA registration process, the CMS Enterprise Portal requires registration of a phone, computer, or e-mail to add an additional level of security to a user’s account.

You may select from the following options to complete the registration process:

* **Smart Phone**: Download Validation & Identity Protection (VIP) access software on your smart phone/tablet. You must enter the alphanumeric credential ID that is generated by the VIP access client. You will then enter the Security Code generated by the VIP client.
* **Computer**: Download VIP access software on your computer. You must enter the alphanumeric credential ID generated by the VIP access client. You will enter the Security Code generated by the VIP client.
* **E-mail**: Select the e-mail option to receive an e-mail containing a Security Code required at login. You must provide a valid, accessible e-mail address.
* **Short Message Service (SMS)**: Use the SMS option to have your Security Code texted to your phone. You must enter a valid phone number. The phone must be capable of receiving text messages. Carrier charges may apply.
* **Interactive Voice Response (IVR)**: Select the IVR option to receive a voice message containing your Security Code. You must provide a valid phone number and (optional) phone extension.

Please follow each step listed below unless otherwise noted.

| **Steps** | **Screenshots** |
| --- | --- |
| 1. Select **Next** to begin registration for the Multi-Factor Authentication process. | Begin MFA process |
| 1. Select an MFA device from the **MFA Device Type** drop-down and select **Next**.   ***Note****: You can select the arrows on the left of each MFA Device Type for additional information.* | Select an MFA device from the MFA Device Type drop-down and select Next. |
| 2a. If selecting **Phone/Tablet/PC/Laptop** as the **MFA Device Type**, enter the alphanumeric code that displays under the field labeled **Credential ID** (on the VIP Access software) in the **Credential** **ID** field. Enter a brief description (e.g., Laptop) in the field labeled **MFA Device Description**. Then select **Next**. | Select Phone/Tablet/PC/Laptop as the MFA Device Type, enter the alphanumeric code that displays under the field labeled Credential ID.  VIP Access Screen |
| 2b. If selecting **Text Message – Short** **Message Service (SMS)** as the **MFA Device Type**, enter the **Phone** **Number** that will be used to obtain the Security Code. Enter a brief description (e.g., Text) in the field labeled **MFA Device Description** and select **Next**. | **Select Text Message – Short Message Service (SMS) as the MFA Device Type. Enter the Phone Number that will be used to obtain the Security Code.** |
| 2c. If selecting **Voice Message – Interactive Voice Response (IVR)** as the **MFA Device Type**, enter the **Phone** **Number** and corresponding **Extension** that will be used to obtain the Security Code. Enter a brief description (e.g., IVR) in the field labeled **MFA Device Description** and select **Next**  *.* ***Note:*** ***Extension*** *is an optional field. You* may *choose to provide a 10-digit phone number or a phone number with an extension.* | Select Voice Message – Interactive Voice Response (IVR) as the MFA Device Type, enter the Phone Number and corresponding Extension. |
| 2d. If selecting **E-mail** as the **MFA Device Type**, the e-mail address on your profile will be automatically used to obtain the Security Code. Enter a brief description (e.g., E-mail) in the field labeled **MFA Device Description** and select **Next**.  ***Note:*** *The e-mail address cannot be changed at the time of MFA device registration. It can only be changed using the 'Change E-Mail Address' option from the 'Change My Profile' menu.* | Select E-mail as the MFA Device Type, the e-mail address on your profile will be automatically used to obtain the Security Code. |
| 1. Your registration for Multi-Factor Authentication is now complete. Select **Next** to proceed with your role request in order to access your application.   ***Note****: You will receive an e-mail notification for successfully registering the MFA Device Type.* | Complete MFA registration |
| 1. If your role requires approval, a message will display with a tracking number for your request. An e-mail will be sent once your request has been approved or rejected. Select **OK** to continue. | Request New Application Access Acknowledgement |