

Centers for Medicare & Medicaid Services
CMS eXpedited Life Cycle (XLC)

Version 1.3

EFI Point of Contact Guide



PR023v EFI Modification Release 3



Revision History

Date	Version	Description of Changes
11/11/2014	0.1	Initial Template
11/13/2014	0.2	Revised with CMS input
08/10/2016	0.3	Updated screenshots and instructions
01/16/2017	0.4	Updated information for Introduction. Updated login instructions for Approve Access Request, Return Access for Modification, Reject and Delete Access Request, Request Approval Authority and Manage Approval Authority.
04/26/2017	0.5	Updated screenshots for Approve Access Request, Return Access Request for Modification and Reject and Delete Access Request
4/28/2017	1.0	Published document, updated version.
6/9/2017	1.1	Updated information for Introduction. Updated information and some screenshots for Approve Access Request, Return Access for Modification, Reject and Delete Access Request, Request Approval Authority, Approve and Deny Approval Authority and Manage Approval Authority.
11/01/2017	1.2	Updated screenshots for Approval Attestation, added User Guide section.
12/15/2017	1.3	Updated information for Introduction. Updated information and some screenshots for Approve Access Request, Return Access for Modification, Reject and Delete Access Request, Request Approval Authority, Approve and Deny Approval Authority and Manage Approval Authority.

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Introduction

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

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

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

Request POC Approval Authority

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

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

Note: Approval Authority can be granted to more than one designated user from the contractor company.

Steps

1. From the EFI login page (<https://eua.cms.gov/efi>) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

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

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

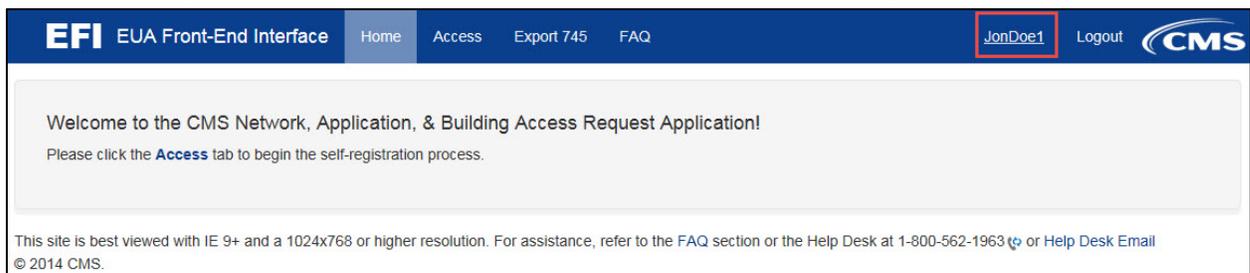


Figure 2: Request Approval Authority - Menu

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



Figure 3: Request Approval Authority - Account Details Page

3. In the **Add Email Address** text field, enter the email address of the POC on whose behalf you are requesting authority to approve then click the **Add** button.

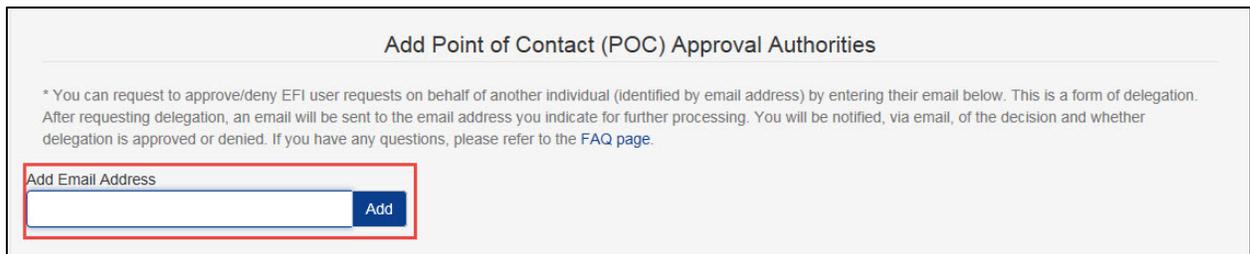


Figure 4: Request Approval Authority - Add POC Email

4. An email will be sent to the Approval Authority informing them of your request.

Approve and Deny Approval Authority

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

Steps

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

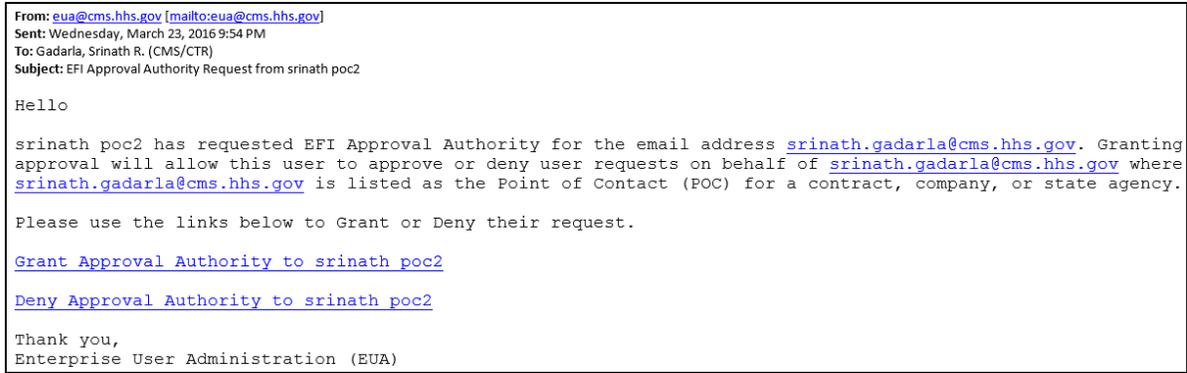


Figure 5: Approve and Deny Approval Authority - Request Email

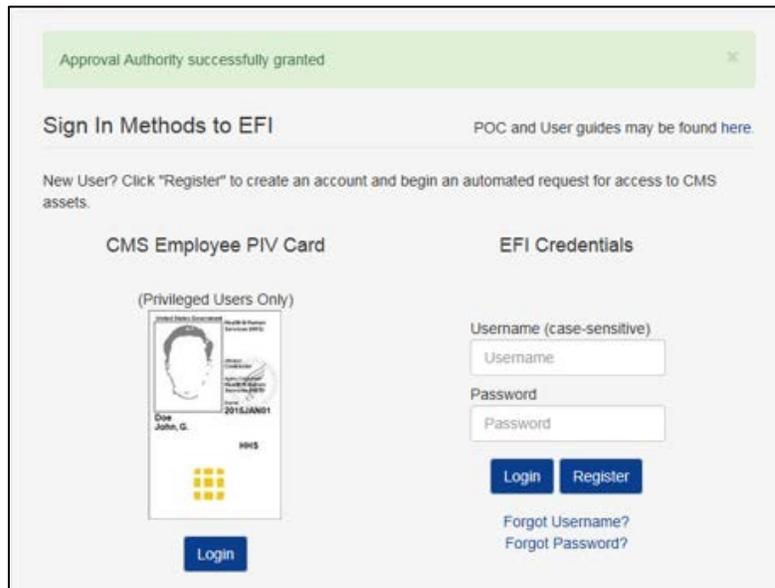


Figure 6: Approval Authority Granted

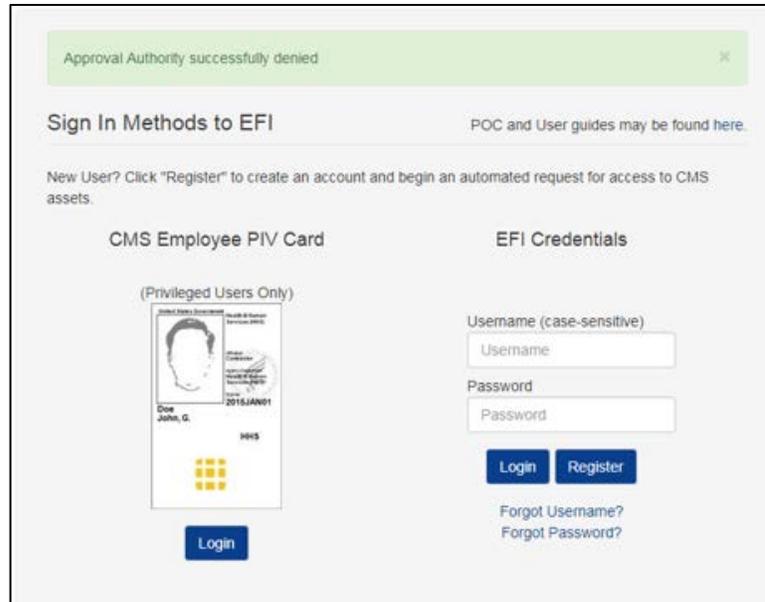


Figure 7: Approval Authority Denied

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



Figure 8: Approval Authority Granted - E-mail Confirmation

Manage Approval Authority

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

Steps

1. From the EFI login page (<https://eua.cms.gov/efi>) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

Figure 9: Login with Username/Password – EFI Credentials section

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

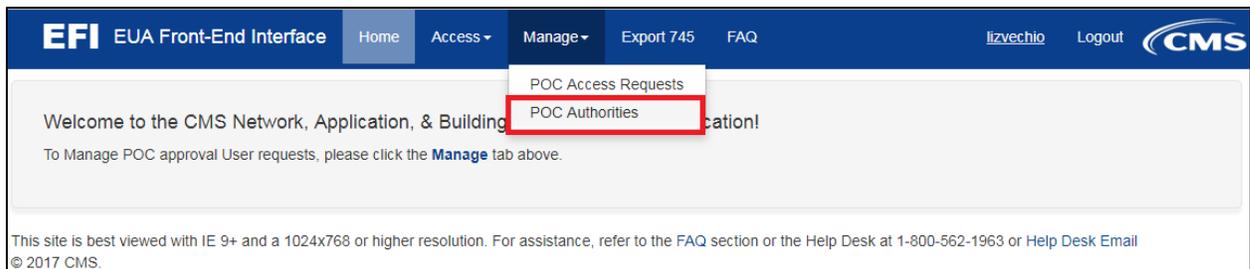


Figure 10: Manage Approval Authority – POC Authorities Menu

- Search for the POC who made the request for Approval Authority using the **Search** text field on the “Manage Point of Contact (POC) Delegated Approval Authorities” page.

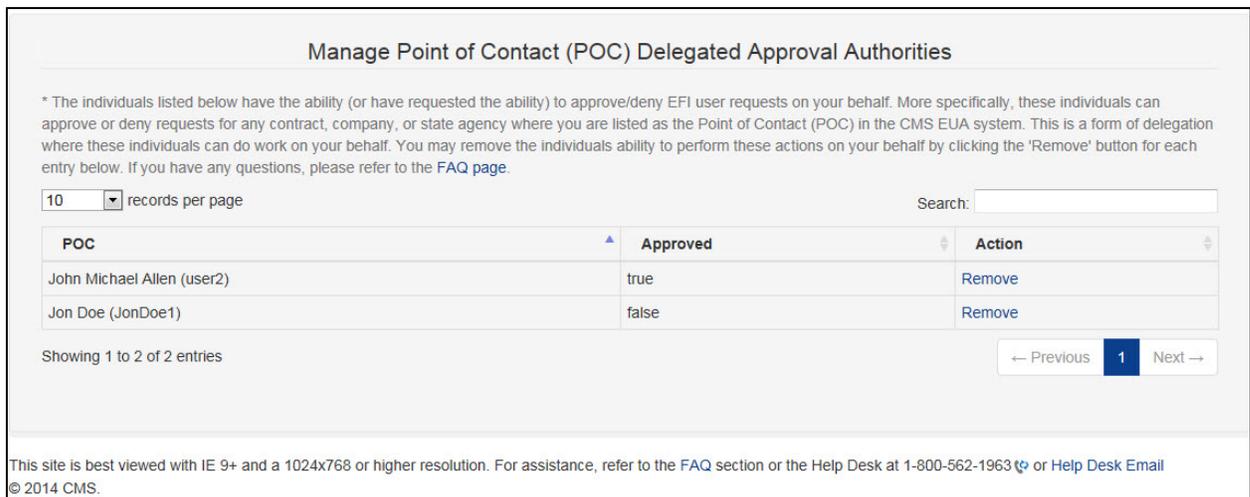


Figure 11: Manage Approval Authority - Page

4. You can review the status or click the **Remove** link button in order to remove the user’s Approval Authority.

Approve Access Request

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

STOP: Before you start to manage access requests you will need to have an EFI account (Please refer to the **EFI New User Guide** for instructions on the registration process) and ask your CMS COR for assistance. If you are the POC from the contract please make sure to use the exact email address during the registration process as it will be matched against the contract’s POC email address. If there is a match between the email address entered and the contract’s POC email address, you will be assigned the POC role. As a POC you will need to fill out the form online and just click the Save Request button (this is to create the new POC record in EFI).

Steps

5. From the EFI login page (<https://eua.cms.gov/efi>) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

The image shows a screenshot of the 'EFI Credentials' login form. The form is centered on a light gray background. At the top, the text 'EFI Credentials' is displayed. Below this, there are two input fields. The first is labeled 'Username (case-sensitive)' and contains the text 'Username'. The second is labeled 'Password' and contains the text 'Password'. At the bottom of the form, there are two blue buttons: 'Login' and 'Register'.

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

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

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

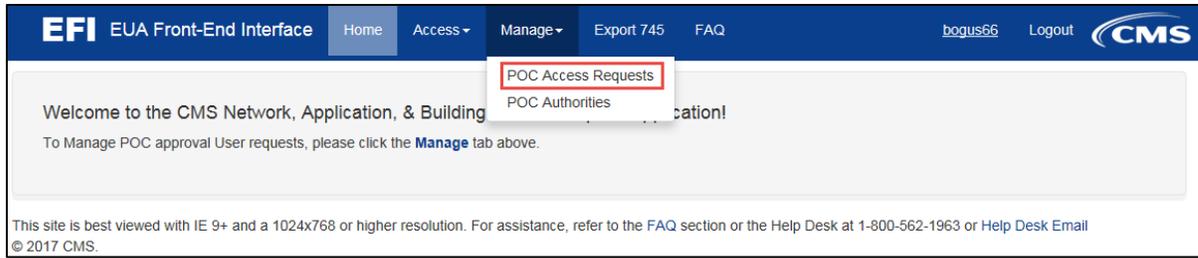


Figure 13: POC Access Requests - Menu

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

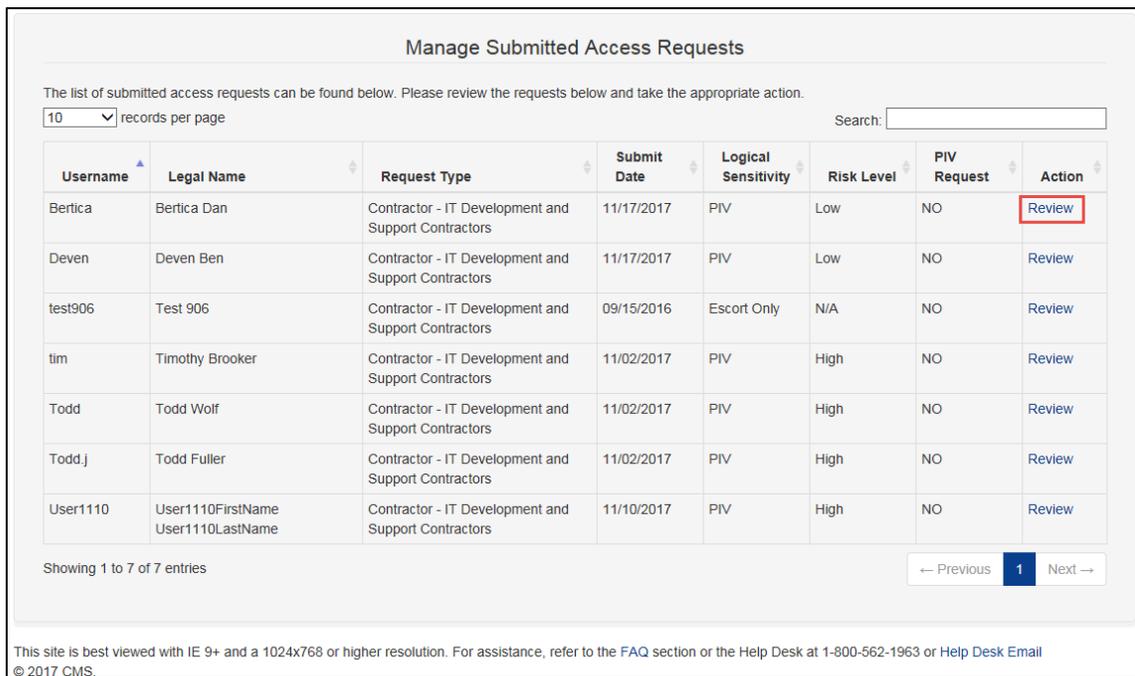


Figure 14: Manage Submitted Access Requests - Page

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



Figure 15: Approve Access Request - Button

10. An email confirmation will be sent to the applicant informing them of the request approval.

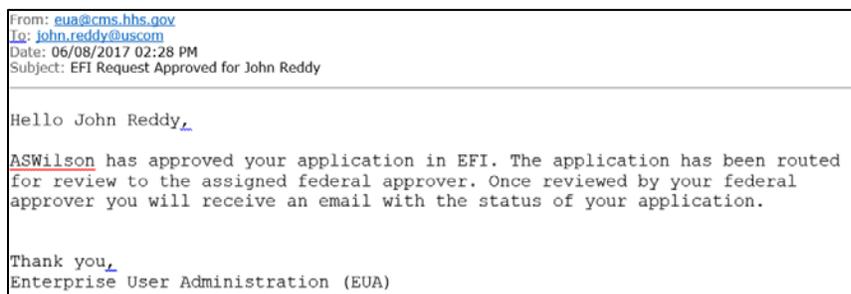


Figure 16: Approve Access Request – Email notification of the request approved

Return Access Request for Modification

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

Steps

1. From the EFI login page (<https://eua.cms.gov/efi>) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

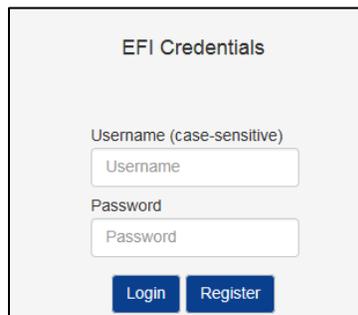


Figure 17: Login with Username/Password – EFI Credentials section

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

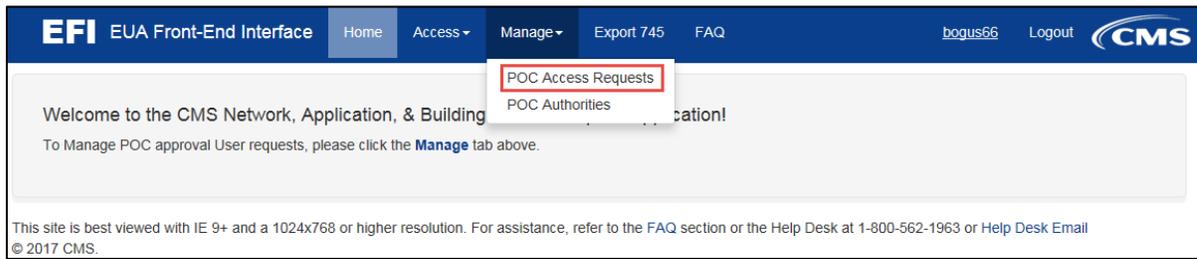


Figure 18: Return Access Request for Modification - Menu

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

Manage Submitted Access Requests

The list of submitted access requests can be found below. Please review the requests below and take the appropriate action.

10 records per page Search:

Username	Legal Name	Request Type	Submit Date	Logical Sensitivity	Risk Level	PIV Request	Action
Bertica	Bertica Dan	Contractor - IT Development and Support Contractors	11/17/2017	PIV	Low	NO	Review
Deven	Deven Ben	Contractor - IT Development and Support Contractors	11/17/2017	PIV	Low	NO	Review
test906	Test 906	Contractor - IT Development and Support Contractors	09/15/2016	Escort Only	N/A	NO	Review
tim	Timothy Brooker	Contractor - IT Development and Support Contractors	11/02/2017	PIV	High	NO	Review
Todd	Todd Wolf	Contractor - IT Development and Support Contractors	11/02/2017	PIV	High	NO	Review
Todd.j	Todd Fuller	Contractor - IT Development and Support Contractors	11/02/2017	PIV	High	NO	Review
User1110	User1110FirstName User1110LastName	Contractor - IT Development and Support Contractors	11/10/2017	PIV	High	NO	Review

Showing 1 to 7 of 7 entries ← Previous 1 Next →

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Figure 19: Return Access Request for Modification - Page

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



Figure 20: Return Access Request for Modification - Button

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

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

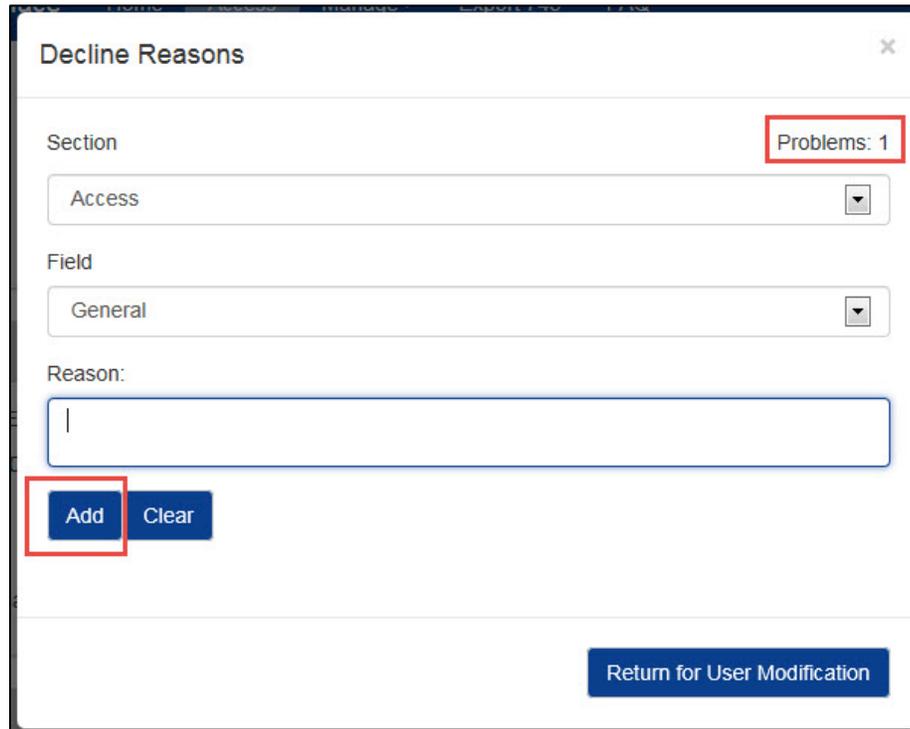


Figure 21: Return Access Request for Modification - Decline Reasons Form

- Once you have indicated all the fields for revision, click the **Return for User Modification** button.
- An email confirmation message will be sent to the applicant with information that needs to be revised.

Reject and Delete Access Request

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

Steps

1. From the EFI login page (<https://eua.cms.gov/efi>) enter your EFI Username and Password under the EFI Credentials section and then click the Login button. (EFI is case-sensitive)

Figure 22: Login with Username/Password – EFI Credentials section

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

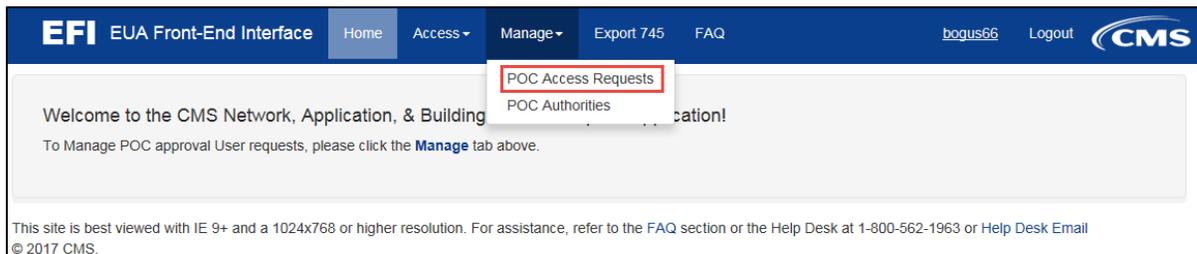


Figure 23: Reject and Delete Access Request - Menu

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

Manage Submitted Access Requests

The list of submitted access requests can be found below. Please review the requests below and take the appropriate action.

10 records per page Search:

Username	Legal Name	Request Type	Submit Date	Logical Sensitivity	Risk Level	PIV Request	Action
Bertica	Bertica Dan	Contractor - IT Development and Support Contractors	11/17/2017	PIV	Low	NO	Review
Deven	Deven Ben	Contractor - IT Development and Support Contractors	11/17/2017	PIV	Low	NO	Review
test906	Test 906	Contractor - IT Development and Support Contractors	09/15/2016	Escort Only	N/A	NO	Review
tim	Timothy Brooker	Contractor - IT Development and Support Contractors	11/02/2017	PIV	High	NO	Review
Todd	Todd Wolf	Contractor - IT Development and Support Contractors	11/02/2017	PIV	High	NO	Review
Todd.J	Todd Fuller	Contractor - IT Development and Support Contractors	11/02/2017	PIV	High	NO	Review
User1110	User1110FirstName User1110LastName	Contractor - IT Development and Support Contractors	11/10/2017	PIV	High	NO	Review

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Figure 24: Reject and Delete Access Request - Page

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

Access Information

By approving this request I attest that the associated applicant is currently working under the CMS contract cited in the application and meets all requirements as included in the current contract, to include but not limited to:

- E-Verify requirements as stated in the Federal Acquisition Regulation (FAR), Part 22 - Application of Labor Laws to Government Acquisition, Subpart 22.18 - , Employment Eligibility Verification.
- Contractor residency requirements as stated in the CMS Security Clause, Section c.i. Contractor Screening of Applicants.

Approve Return For Modification **Reject and Delete**

Figure 25: Reject and Delete Access Request - Button

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

Figure 26: Reject and Delete Access Request - Pop-up Box

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

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

Where to find this POC Guide

This POC Guide is accessible from the EFI login screen.

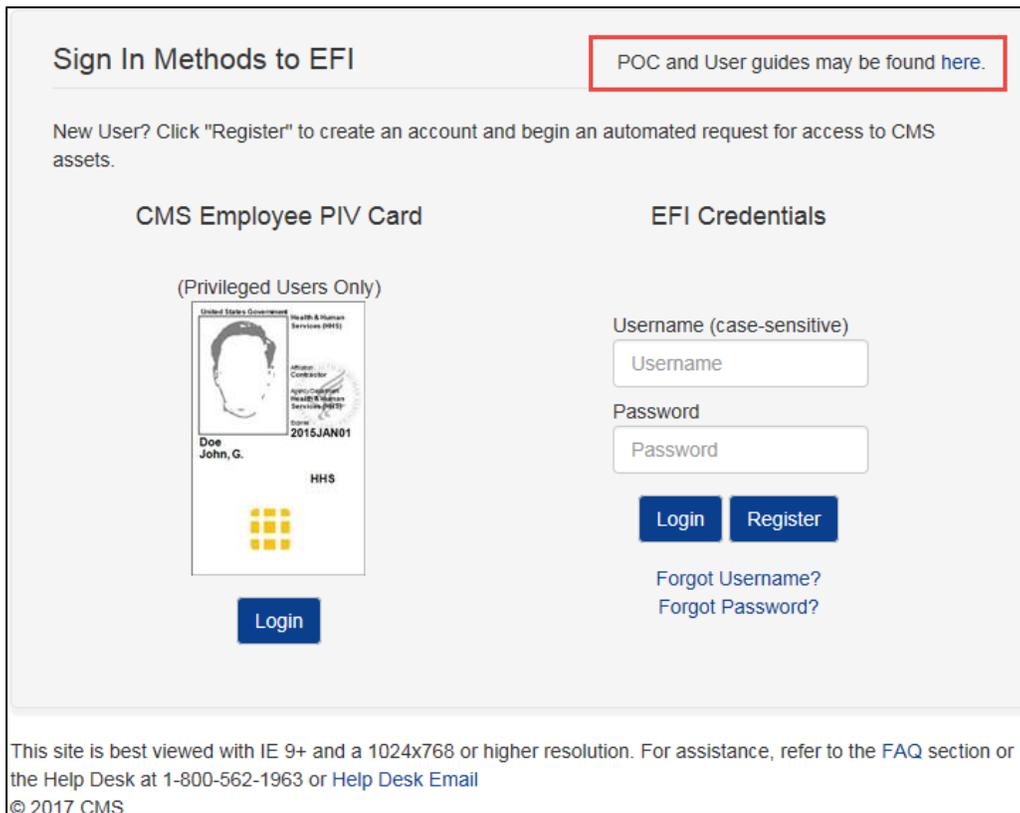


Figure 27: User Guide on Login Screen

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

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

This POC Guide is accessible to those individuals who have an EUA account and are not on the CMS domain via this external link:

<https://vpnext.cms.hhs.gov/EUADOCS>