

CMS Portal Guide for New Users: ID.me



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CMS PORTAL GUIDE FOR NEW USERS: ID.ME

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A. Overview

The Centers for Medicare and Medicare Services (CMS) Portal allows users to access one or more CMS applications, such as the Marketplace Learning Management System (MLMS) and the Marketplace Assister Community (MAC), using a single set of login credentials.

The CMS Portal now supports Credential Service Providers (CSPs) to make signing in easier and more secure. ID.me is one supported CSP that allows you to securely sign in using an existing account or by creating a new one. If you have never used the CMS Portal before (for example, if you have never completed annual Assister certification training), you must create a new user account and complete identity verification to access CMS applications as a Certified Application Counselor (CAC), Navigator, Assister, or Leadership contact.

There are several ways to access the CMS Portal:

- **If you already have a CMS Portal account,** [sign in](#) using your existing CMS Portal credentials. Refer to the [CMS Portal Guide for Existing Users with IDM Accounts](#) for detailed instructions.
- **If you have a Login.gov account,** [sign in](#) using your Login.gov credentials. Refer to the [CMS Portal User Guide for New Users - Login.gov](#) for additional instructions.
- **If you have an ID.me account,** [sign in](#) using your ID.me credentials. Refer to the [Logging In to the CMS Portal Using Your ID.me Account](#) section in this document.

If you have an existing ID.me or Login.gov account but have not completed identity verification, you must complete verification before accessing CMS applications.

- **If you do not have a CMS Portal, Login.gov, or ID.me account,** you will need to create one using the ID.me or Login.gov selection. To ensure your account connects properly to the CMS systems, begin the account creation process from the [CMS Enterprise Portal](#). **Do not create your new ID.me or Login.gov account directly on their websites.**

Refer to [Figure 1](#) for a flowchart and decision tree outlining the access request and login process. A Section 508-compliant text-only description of the workflow is available in [Appendix A: Accessible Workflow Transcript](#).

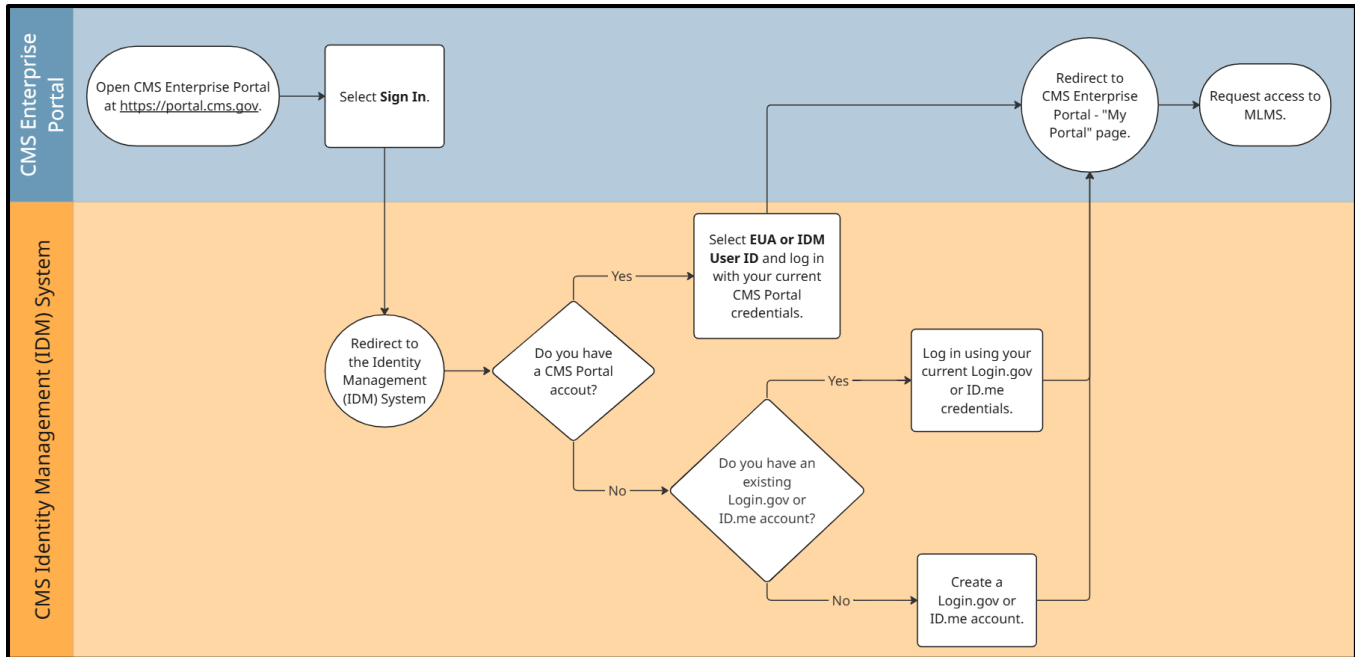


Figure 1: CMS Portal Login Flowchart

You will use this guide to create a new ID.me account or access an existing one.

If you experience issues creating an ID.me account, refer to [Appendix B: Avoiding Creation of a Duplicate Account](#). If you continue to experience issues, please reach out to CACQuestions@cms.hhs.gov or 844-497-2123 for assistance.

B. Creating an ID.me Account for New Users

1. Creating an ID.me Account

To create an ID.me account:

Step 1. Access the [CMS Enterprise Portal](https://portal.cms.gov) at portal.cms.gov and select **Sign In**.

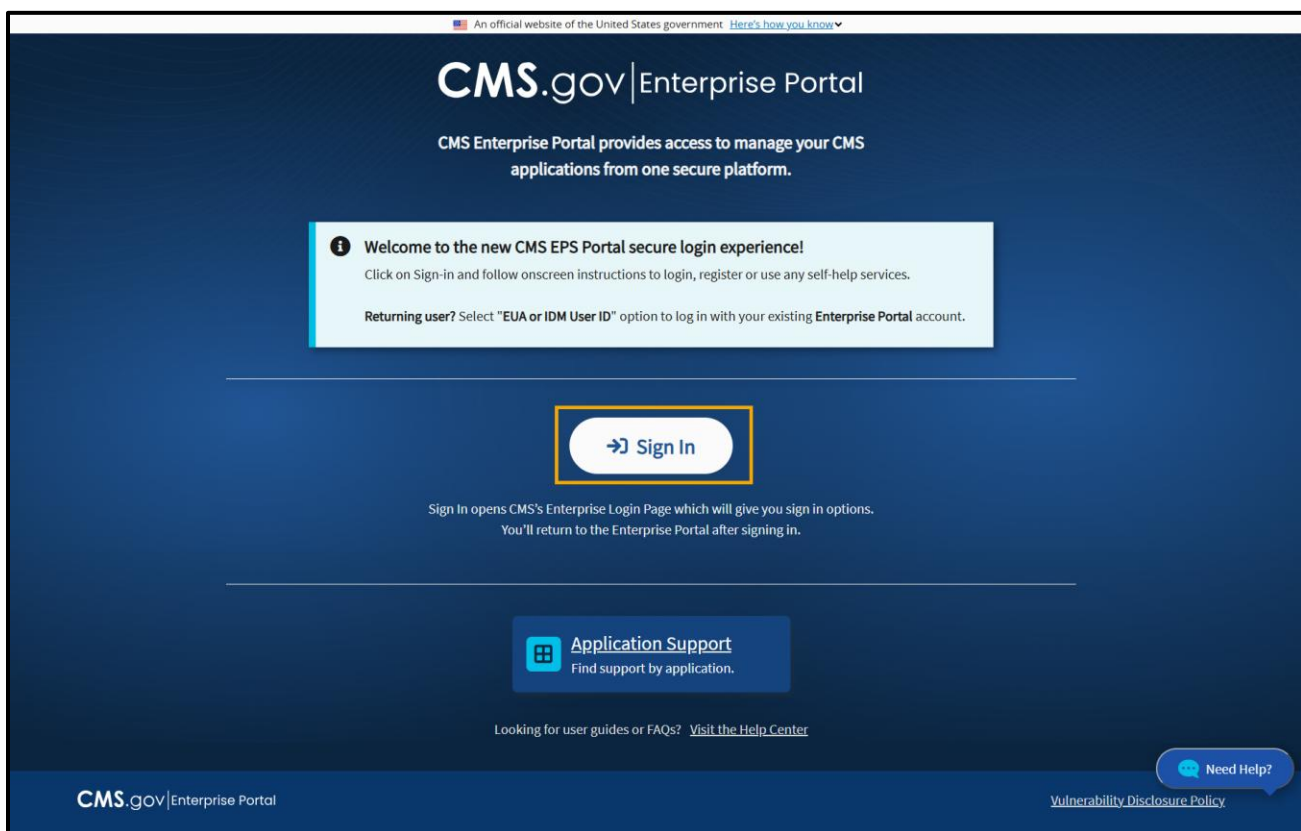
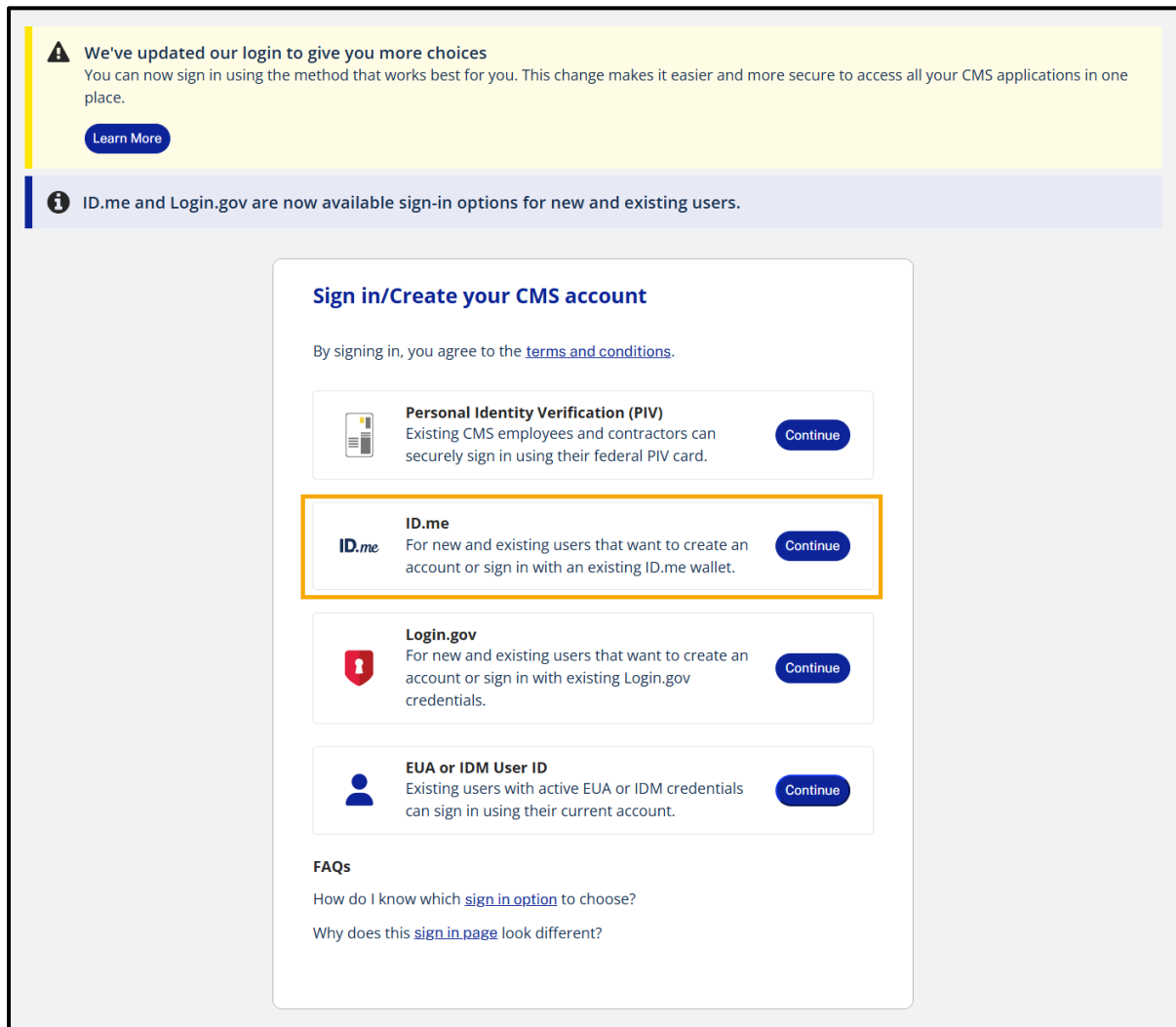


Figure 2: CMS Enterprise Portal Sign in Page

Step 2. The CMS Portal will redirect you to the [CMS.gov Identity Management System](#). In the “ID.me” section, select **Continue**.



⚠ We've updated our login to give you more choices
You can now sign in using the method that works best for you. This change makes it easier and more secure to access all your CMS applications in one place.
[Learn More](#)

i ID.me and Login.gov are now available sign-in options for new and existing users.

Sign in/Create your CMS account

By signing in, you agree to the [terms and conditions](#).

**Personal Identity Verification (PIV)**
Existing CMS employees and contractors can securely sign in using their federal PIV card.
[Continue](#)

**ID.me**
For new and existing users that want to create an account or sign in with an existing ID.me wallet.
[Continue](#)

**Login.gov**
For new and existing users that want to create an account or sign in with existing Login.gov credentials.
[Continue](#)

**EUA or IDM User ID**
Existing users with active EUA or IDM credentials can sign in using their current account.
[Continue](#)

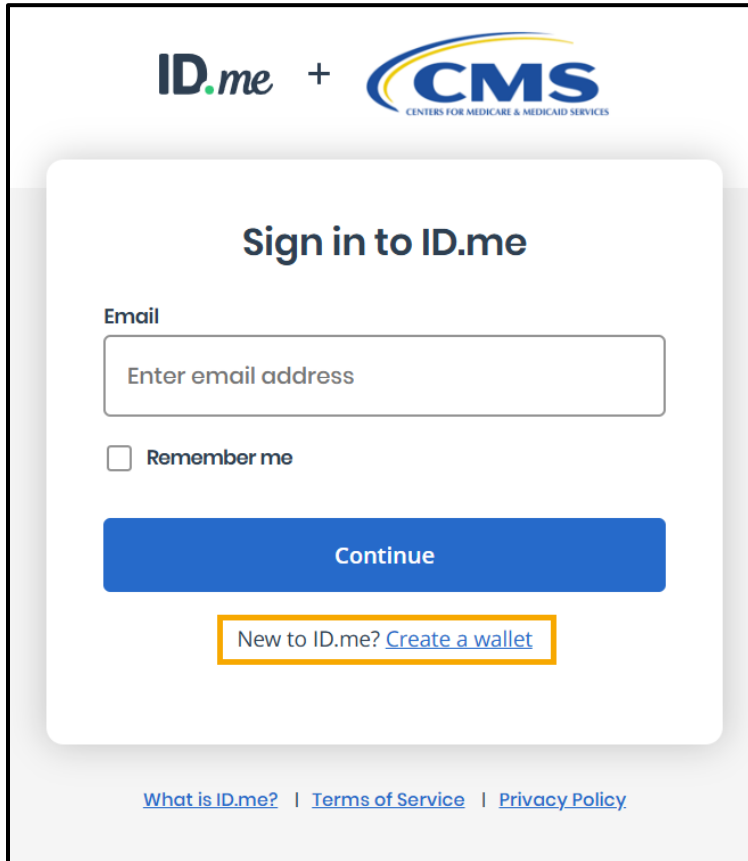
FAQs

How do I know which [sign in option](#) to choose?

Why does this [sign in page](#) look different?

Figure 3: CMS.gov Identity Management – ID.me Section

Step 3. Select **Create a wallet** to begin creating your ID.me account.

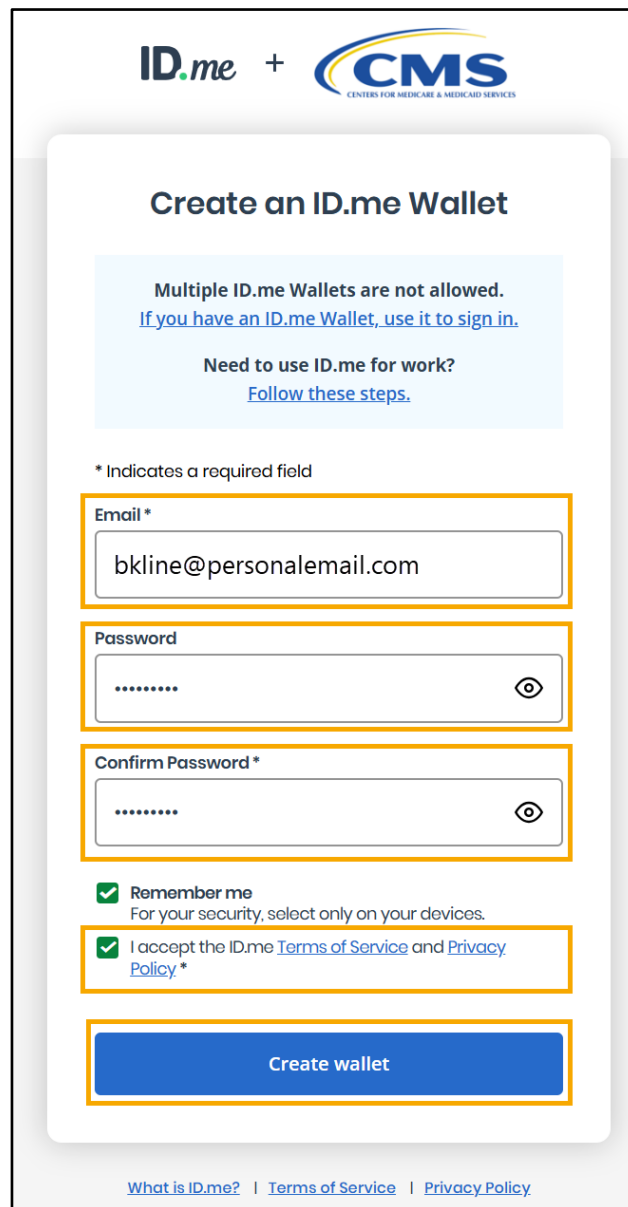


The image shows a sign-in interface for ID.me, part of the CMS (Centers for Medicare & Medicaid Services) system. At the top, the ID.me logo is followed by a plus sign and the CMS logo. The main heading is "Sign in to ID.me". Below this is an "Email" label and a text input field with the placeholder "Enter email address". Under the input field is a checkbox labeled "Remember me". A large blue button labeled "Continue" is positioned below the checkbox. At the bottom of the sign-in area, there is a link that says "New to ID.me? [Create a wallet](#)", which is highlighted with an orange rectangular border. At the very bottom of the screen, there are three links: "What is ID.me?", "Terms of Service", and "Privacy Policy".

Figure 4: New to ID.me? Create a Wallet Link

Step 4. On the “Create an ID.me Wallet” page:

- a. Enter your personal email address.
- b. Create a strong password and enter it in both password fields. Passwords must contain an uppercase letter, a lowercase letter, and be at least eight characters.
- c. Check the box to accept the Terms of Service and Privacy Policy.



The screenshot shows the 'Create an ID.me Wallet' page. At the top, there are logos for ID.me and CMS (Centers for Medicare & Medicaid Services). Below the logos, the title 'Create an ID.me Wallet' is displayed. A light blue box contains the following text: 'Multiple ID.me Wallets are not allowed. If you have an ID.me Wallet, use it to sign in.' and 'Need to use ID.me for work? Follow these steps.' Below this, a note states '* Indicates a required field'. The form fields are: 'Email *' with the value 'bkline@personalemail.com', 'Password' with masked characters and an eye icon, and 'Confirm Password *' with masked characters and an eye icon. Below the password fields, there are two checkboxes: 'Remember me' (checked) with the text 'For your security, select only on your devices.' and 'I accept the ID.me Terms of Service and Privacy Policy *' (checked). At the bottom, there is a blue button labeled 'Create wallet'. At the very bottom of the page, there are links: 'What is ID.me?', 'Terms of Service', and 'Privacy Policy'.

Figure 5: Create an ID.me Wallet

Step 5. ID.me will send a confirmation email from hello@id.me. Confirm your email using one of the following:

- Select the link in the email.
- Enter the six-digit confirmation code from the email and select **Confirm code**.



CONFIRM YOUR EMAIL ADDRESS



We sent an email to bkline@personalemail.com.

Click the link in our email

Check your inbox for an email from hello@id.me and click the link inside to confirm your email address.

If you do not receive an email within 10 minutes, check your spam folder and verify it hasn't been blocked.

[Why do I need to confirm my email?](#)

OR

Enter the 6-digit code from the email

Confirmation Code

400287

Confirm code

Didn't receive the email?

[Resend my verification](#)

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 6: Confirm Your Email Address

Step 6. Choose at least one multi-factor authentication (MFA) method. For details, review the [Multi-factor authentication \(MFA\) options for ID.me](#) web page.

More secure (recommended) methods include:

- Passkey
- Security Key
- NFC-enabled mobile security key
- Code generator application

Other available methods include:

- Push notification
- Text message or phone call



SECURE YOUR WALLET

1
2
3

Set up multi-factor authentication (MFA)

Secure your wallet by selecting an MFA method.
[Learn more about security levels](#)



Passkey

Trust this device? Quickly and securely sign in next time using this device's facial recognition, fingerprint, or PIN.

Very strong security



Text Message or Phone Call

Receive and enter a 6-digit code.

Fair security



Push Notification

Approve sign-in with the ID.me Authenticator mobile app.

Moderate security



Code Generator Application

Verify a 6-digit code from the ID.me Authenticator app.

Strong security



Security Key

Insert and tap a physical security key.

Very strong security



NFC-Enabled Mobile Security Key

Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.

Very strong security

Figure 7: Secure Your Wallet – Set Up MFA

- Step 7.** Follow the instructions provided for your selected MFA method. ID.me will send a confirmation email once setup is complete.
- Step 8.** On the “Your Wallet is Now Secure” page, you can:
- Select **Generate recovery code** to create a backup code you can use if you lose access to your MFA device. Copy and store this code in a secure place.
 - Select **Continue** when you are ready to proceed.

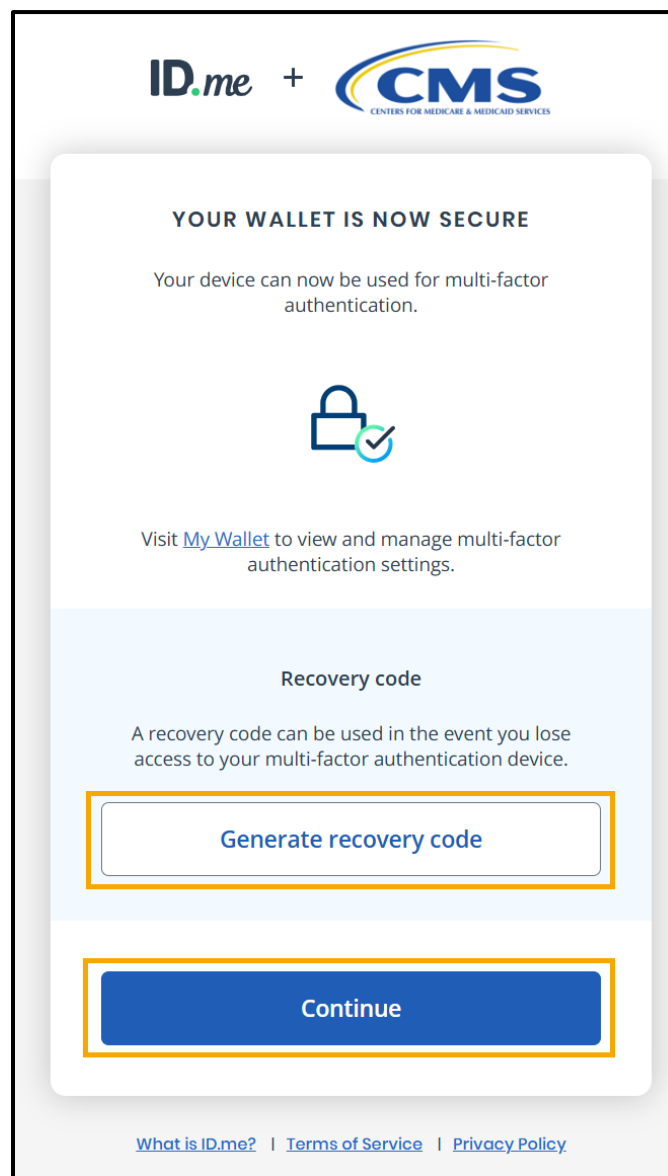


Figure 8: Your Wallet is Now Secure – Generate Recovery Code and Continue Buttons

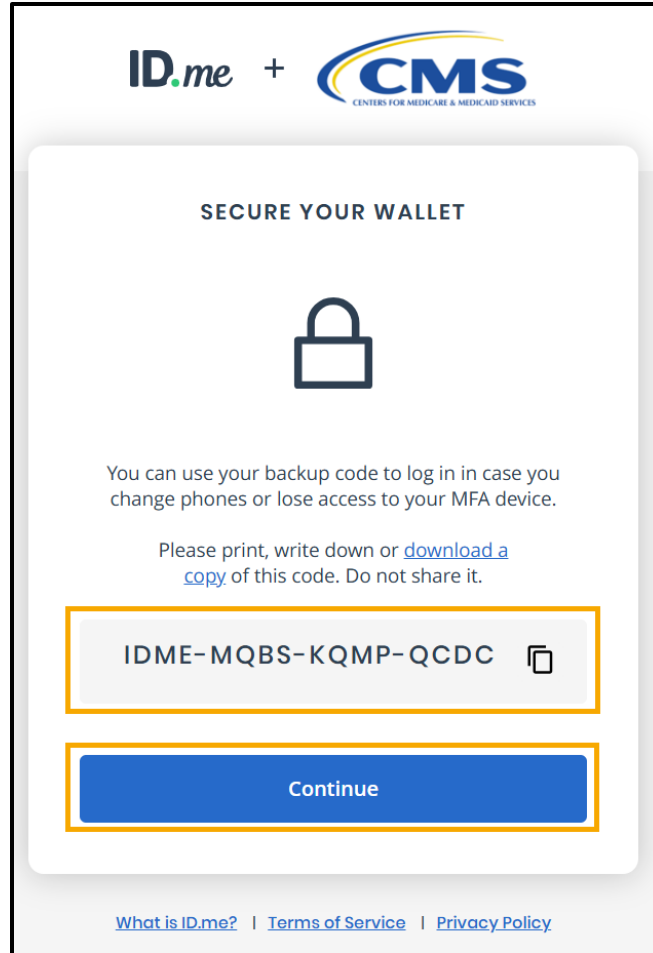
A screenshot of a web interface for "ID.me + CMS". At the top, the "ID.me" logo is followed by a plus sign and the "CMS" logo. The main heading is "SECURE YOUR WALLET" in all caps. Below this is a large padlock icon. The text reads: "You can use your backup code to log in in case you change phones or lose access to your MFA device." followed by "Please print, write down or [download a copy](#) of this code. Do not share it." Below this is a white box with a yellow border containing the code "IDME-MQBS-KQMP-QCDC" and a copy icon. At the bottom of this box is a blue button with the text "Continue". At the very bottom of the screen are three links: "What is ID.me?", "Terms of Service", and "Privacy Policy".

Figure 9: Secure Your Wallet - Recovery Code

2. Verifying your Identity

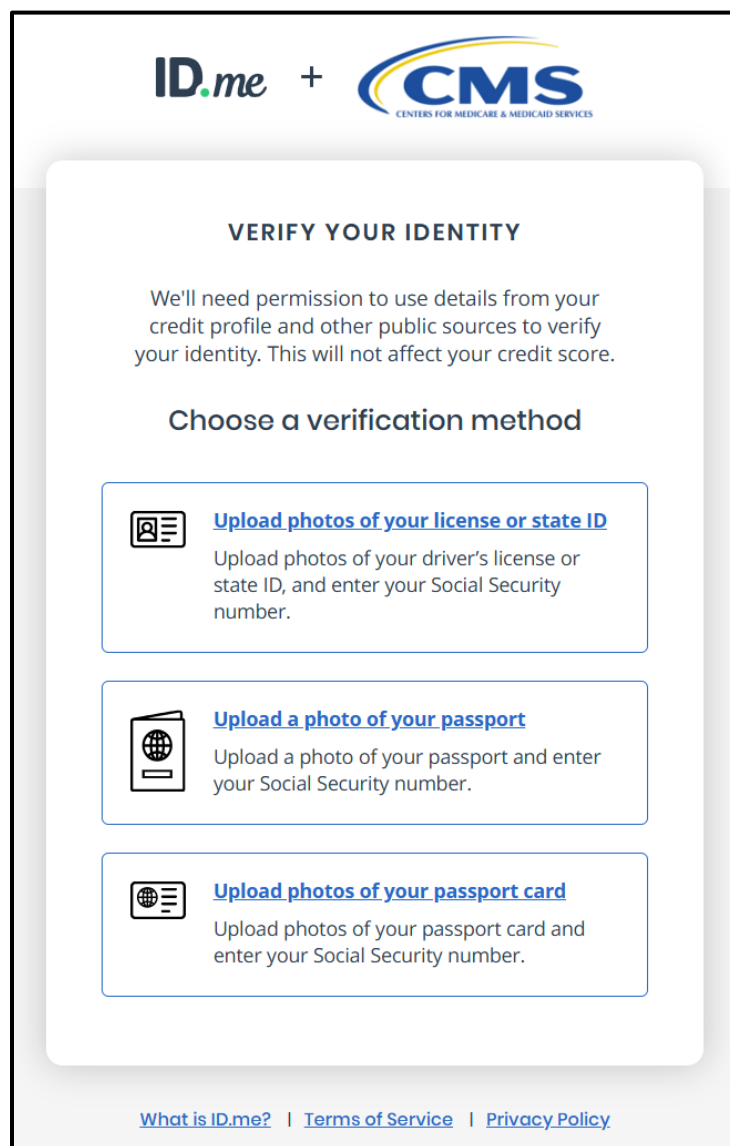
After you create your ID.me account and set up multi-factor authentication, you must **verify your identity**.

Please enter your personal information with extreme care during account creation. You must use your legal first name exactly as it appears on your official documents, and you should not place your middle initial or middle name in the First Name field. Even minor errors, such as misspellings, misplaced initials, or incorrect name formatting, can cause identity verification issues and cannot be edited after you submit your information. This may prevent you from completing the identity verification process. We strongly recommend reviewing all information prior to submitting.

To verify your identity:

Step 1. Select a method to verify your identity:

- Driver's license or state ID
- Passport
- Passport card



ID.me + **CMS**
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VERIFY YOUR IDENTITY

We'll need permission to use details from your credit profile and other public sources to verify your identity. This will not affect your credit score.

Choose a verification method

 [Upload photos of your license or state ID](#)
Upload photos of your driver's license or state ID, and enter your Social Security number.

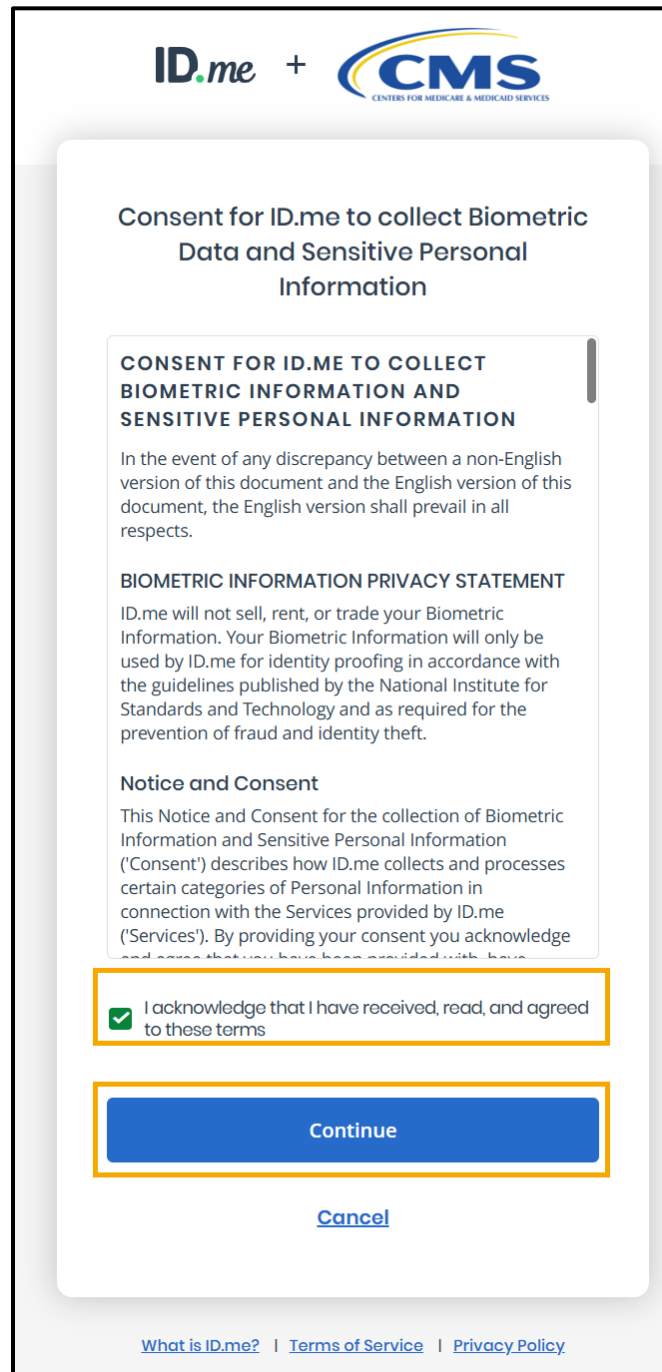
 [Upload a photo of your passport](#)
Upload a photo of your passport and enter your Social Security number.

 [Upload photos of your passport card](#)
Upload photos of your passport card and enter your Social Security number.

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 10: Verify Your Identity - Choose a Verification Method

- Step 2.** Review the consent statement for ID.me to collect biometric data and sensitive personal information. Select the **checkbox** to agree and then select **Continue**.



The image shows a consent form titled "Consent for ID.me to collect Biometric Data and Sensitive Personal Information". At the top, there are logos for ID.me and CMS (Centers for Medicare & Medicaid Services). The form contains the following text:

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information. Your Biometric Information will only be used by ID.me for identity proofing in accordance with the guidelines published by the National Institute for Standards and Technology and as required for the prevention of fraud and identity theft.

Notice and Consent

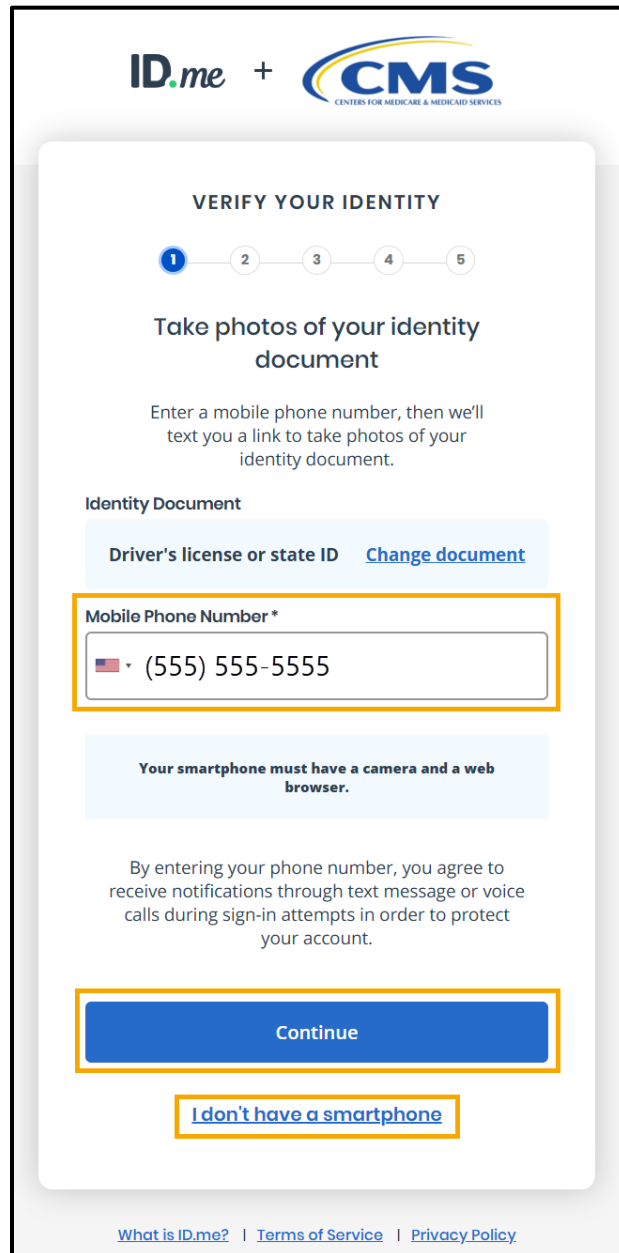
This Notice and Consent for the collection of Biometric Information and Sensitive Personal Information ('Consent') describes how ID.me collects and processes certain categories of Personal Information in connection with the Services provided by ID.me ('Services'). By providing your consent you acknowledge and agree that you have been provided with this

Below the text, there is a checkbox with a green checkmark and the text "I acknowledge that I have received, read, and agreed to these terms". This checkbox is highlighted with an orange border. Below the checkbox is a blue button labeled "Continue", also highlighted with an orange border. Below the "Continue" button is a blue link labeled "Cancel". At the bottom of the form, there are three links: "What is ID.me?", "Terms of Service", and "Privacy Policy".

Figure 11: Consent to Collect Personal Information

Step 3. Choose how you will upload your identity document:

- If you have a smartphone, enter your phone number and select **Continue**. Proceed to [Step 3a](#).
- If you do not have a smartphone, select **I don't have a smartphone**. Proceed to [Step 3b](#).



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VERIFY YOUR IDENTITY

1 2 3 4 5

Take photos of your identity document

Enter a mobile phone number, then we'll text you a link to take photos of your identity document.

Identity Document

Driver's license or state ID [Change document](#)

Mobile Phone Number *

(555) 555-5555

Your smartphone must have a camera and a web browser.

By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

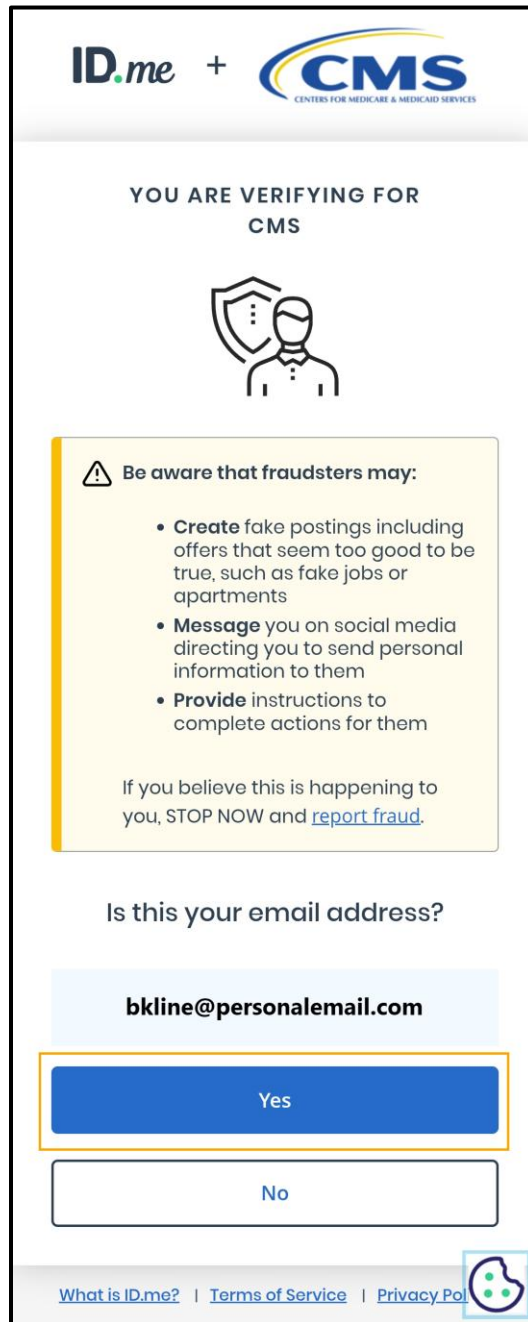
Continue

[I don't have a smartphone](#)

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 12: Verify Your Identity - Enter Mobile Phone Number

- a. To upload documents using a smartphone it must have a camera and a web browser.
- i. ID.me will send a text message with a link. Select the link, review the email address displayed on the “You are Verifying for CMS” page, and select **Yes**.



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**YOU ARE VERIFYING FOR
CMS**



⚠ Be aware that fraudsters may:

- **Create** fake postings including offers that seem too good to be true, such as fake jobs or apartments
- **Message** you on social media directing you to send personal information to them
- **Provide** instructions to complete actions for them

If you believe this is happening to you, STOP NOW and [report fraud](#).

Is this your email address?

bkline@personalemail.com

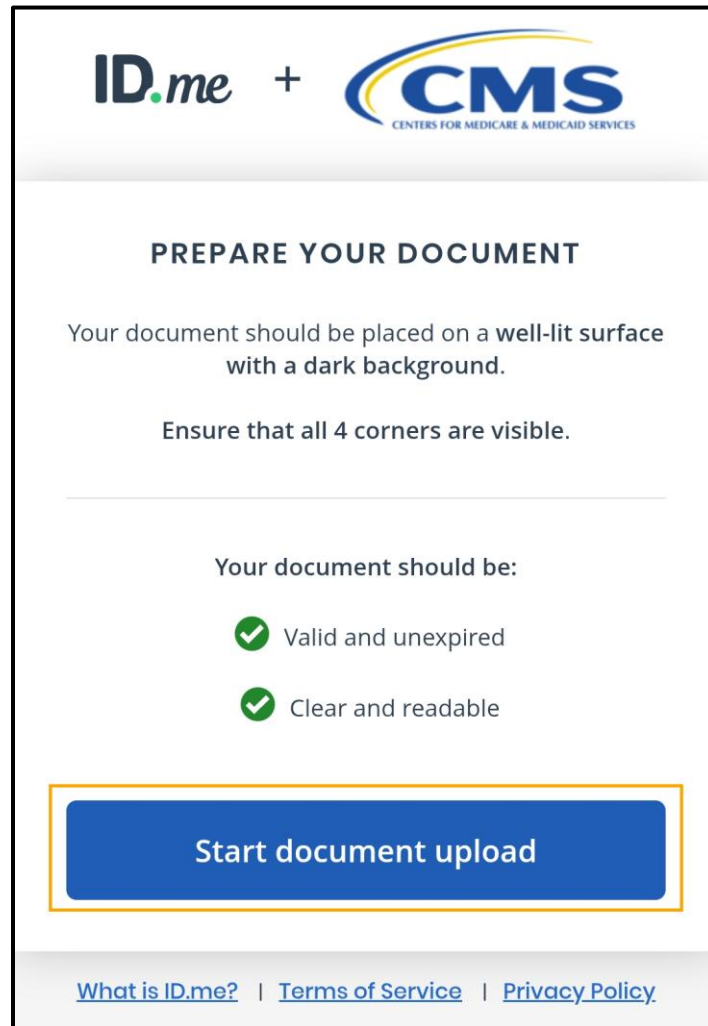
Yes

No

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#) 

Figure 13: You are Verifying for CMS – Verify Your Email Address

- ii. On the “Prepare Your Document” page, follow the guidance: place your documents on a well-lit surface with a dark background, keep all four corners visible, and ensure the document is valid and unexpired. Select **Start Document Upload**.



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PREPARE YOUR DOCUMENT

Your document should be placed on a well-lit surface with a dark background.

Ensure that all 4 corners are visible.

Your document should be:

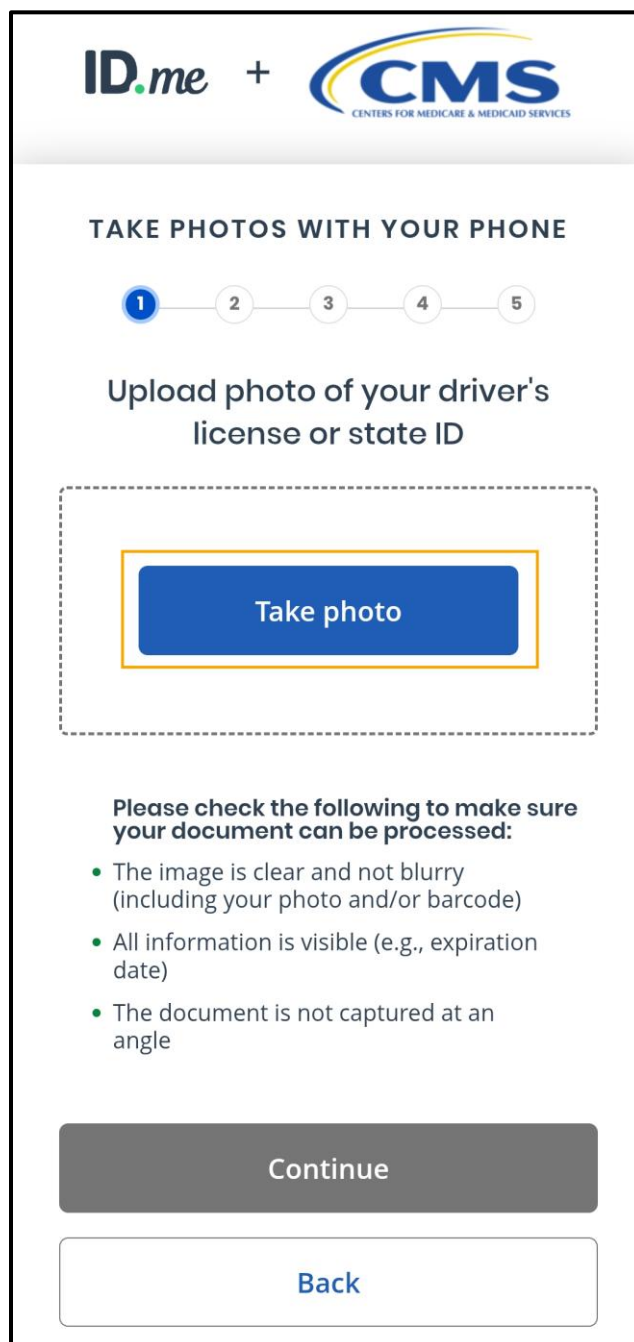
- ✓ Valid and unexpired
- ✓ Clear and readable

Start document upload

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 14: Prepare Your Document - Start Document Upload

- iii. On the “Take Photos with Your Phone” page, select **Take Photo**. Use your phone’s camera to take photos of the front and back of your document (if applicable).



The screenshot shows a mobile application interface. At the top, there is a header with the 'ID.me' logo followed by a plus sign and the 'CMS' logo with the text 'CENTERS FOR MEDICARE & MEDICAID SERVICES' below it. Below the header, the title 'TAKE PHOTOS WITH YOUR PHONE' is displayed. Underneath the title is a progress indicator consisting of five numbered circles (1 through 5), with the first circle (1) highlighted in blue. Below the progress indicator, the text 'Upload photo of your driver's license or state ID' is shown. A dashed rectangular box contains a blue button with the text 'Take photo'. Below this box, there is a section titled 'Please check the following to make sure your document can be processed:' followed by a bulleted list of three items: 'The image is clear and not blurry (including your photo and/or barcode)', 'All information is visible (e.g., expiration date)', and 'The document is not captured at an angle'. At the bottom of the screen, there are two buttons: a grey 'Continue' button and a white 'Back' button with a blue border.

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TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5

Upload photo of your driver's
license or state ID

Take photo

**Please check the following to make sure
your document can be processed:**

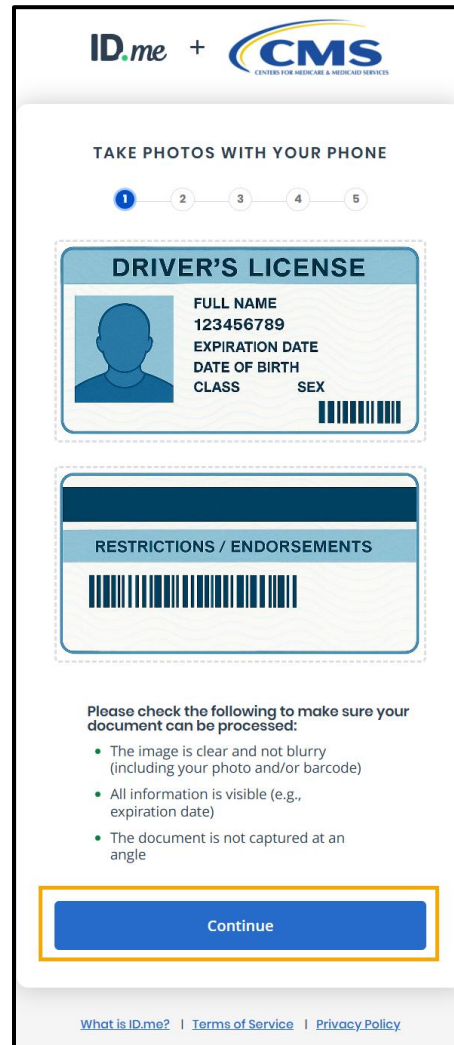
- The image is clear and not blurry
(including your photo and/or barcode)
- All information is visible (e.g., expiration
date)
- The document is not captured at an
angle

Continue

Back

Figure 15: Take Photos with Your Phone - Take Photos

- iv. Review the images. Ensure they are clear, readable, and not angled. Select **Continue**.



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TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5

DRIVER'S LICENSE

FULL NAME
123456789
EXPIRATION DATE
DATE OF BIRTH
CLASS SEX

RESTRICTIONS / ENDORSEMENTS

Please check the following to make sure your document can be processed:

- The image is clear and not blurry (including your photo and/or barcode)
- All information is visible (e.g., expiration date)
- The document is not captured at an angle

Continue

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 16: Take Photos with Your Phone

- v. You will be prompted to take a short video of yourself for liveness detection. Select **Start**, then **Start liveness detection**. If prompted, allow camera access.

ID.me will compare the video to your identity document.

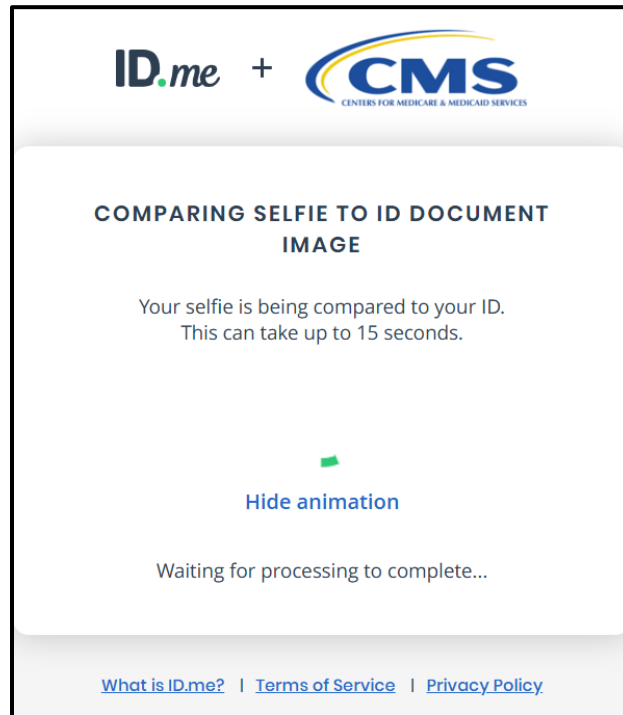


Figure 17: Comparing Selfie to ID Document Image

- vi. After the system processes your document and video, you will be prompted to return to the original browser tab where you began creating your ID.me account. Proceed to [Step 4](#).

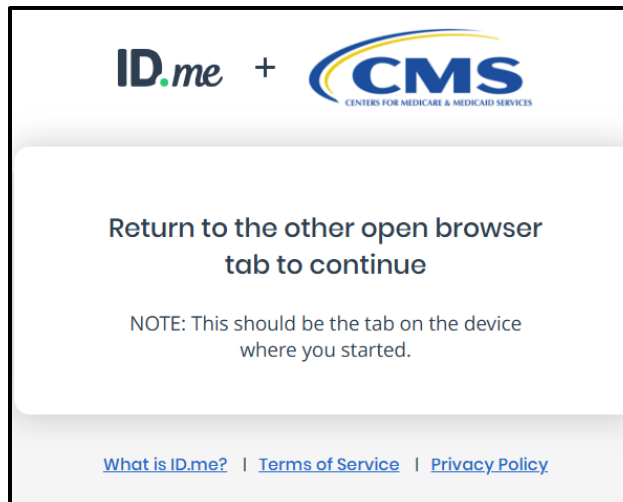
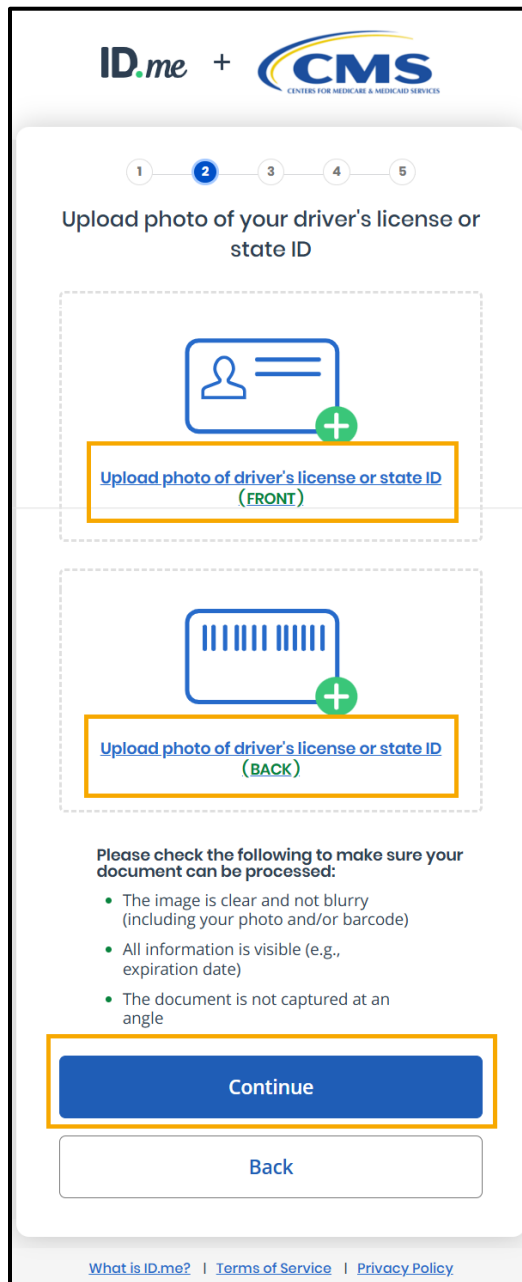


Figure 18: Return to Original Browser Prompt

- b. If you do not have a smartphone, you may upload images from your computer or use your computer's camera.
- i. Upload clear images of your identity document (front and back if applicable). Ensure the images are readable and not angled. Select **Continue**.



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1 2 3 4 5

Upload photo of your driver's license or state ID

Upload photo of driver's license or state ID (FRONT)

Upload photo of driver's license or state ID (BACK)

Please check the following to make sure your document can be processed:

- The image is clear and not blurry (including your photo and/or barcode)
- All information is visible (e.g., expiration date)
- The document is not captured at an angle

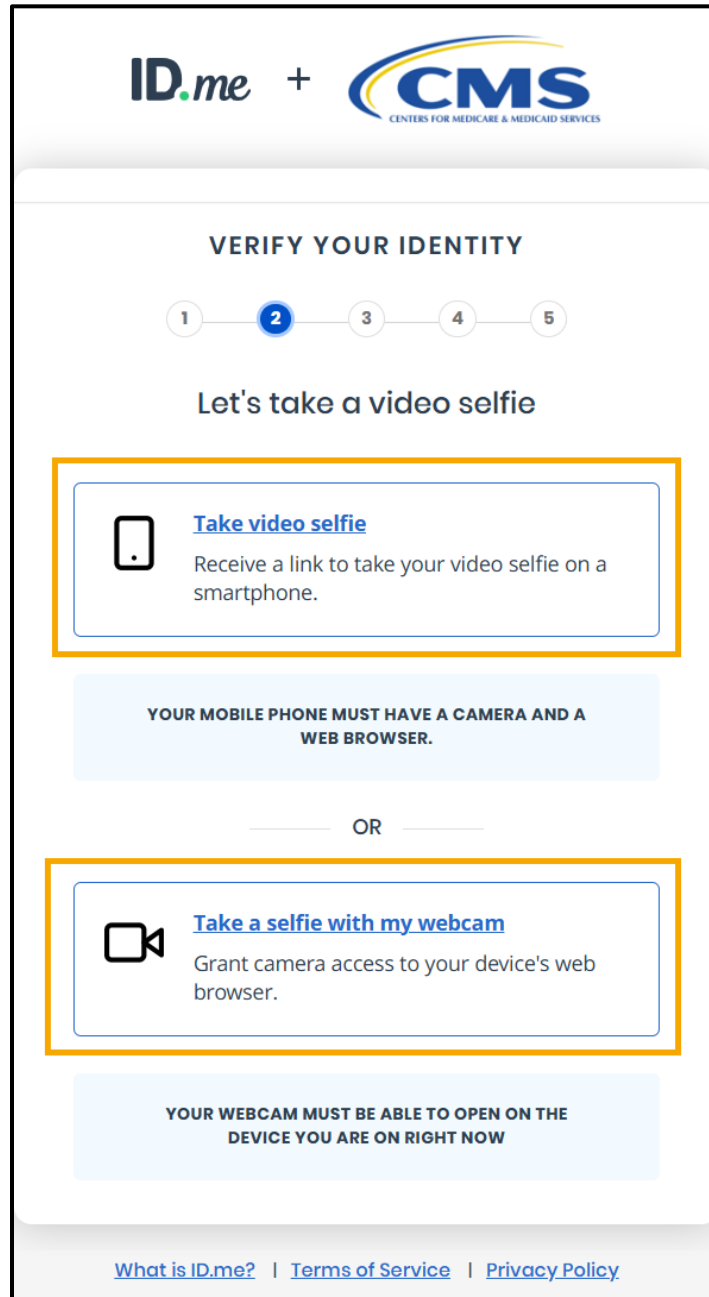
Continue

Back

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 19: Upload Photos of Your Driver's License or State ID

- ii. Choose how you want to record a video of yourself. Select Take video selfie to receive a link on a smartphone or Take a selfie with my webcam to use your computer.



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VERIFY YOUR IDENTITY

1 2 3 4 5

Let's take a video selfie

 [Take video selfie](#)
Receive a link to take your video selfie on a smartphone.

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

OR

 [Take a selfie with my webcam](#)
Grant camera access to your device's web browser.

YOUR WEBCAM MUST BE ABLE TO OPEN ON THE DEVICE YOU ARE ON RIGHT NOW

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 20: Verify Your Identity - Let's Take a Video Selfie

- iii. Select **Start liveness detection** and allow camera access if prompted.

ID.me will compare your video to your document.

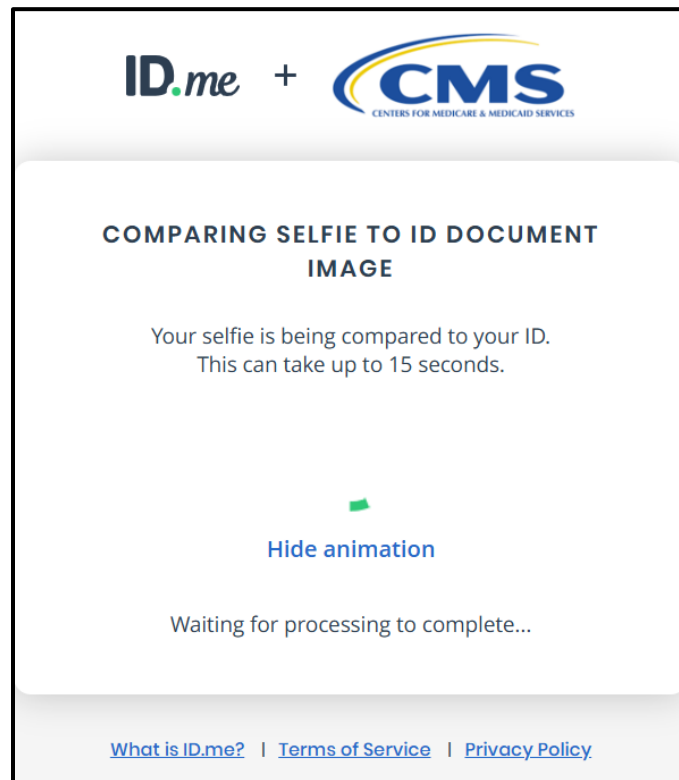
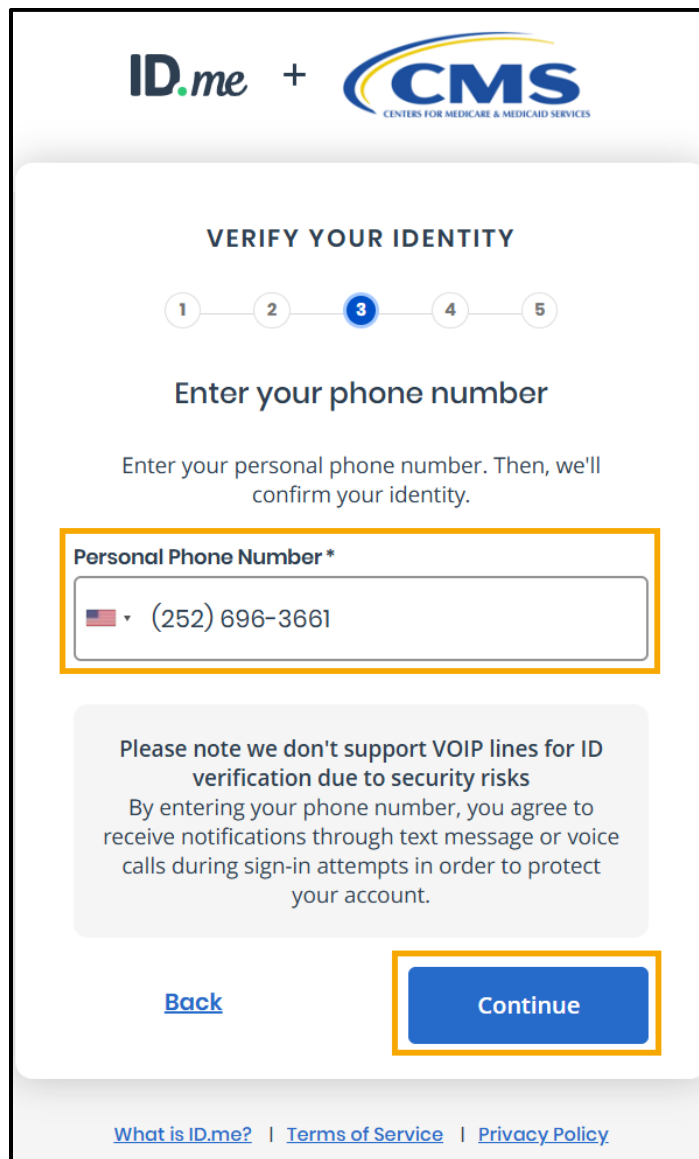


Figure 21: Comparing Selfie to ID Document Image

- iv. Enter your personal phone number and select **Continue**. After your phone number is verified, proceed to [Step 4](#).

You must enter your own phone number, not a shared one. If you do not have a personal phone or the system cannot verify your information, visit the [Verifying with an Extended Video Call](#) page in the [ID.me Help Center](#).



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VERIFY YOUR IDENTITY

1 — 2 — **3** — 4 — 5

Enter your phone number

Enter your personal phone number. Then, we'll confirm your identity.

Personal Phone Number *

🇺🇸 ▾ (252) 696-3661

Please note we don't support VOIP lines for ID verification due to security risks
By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

[Back](#) **Continue**

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 22: Verify Your Identity - Enter Your Phone Number

Step 4. Enter your Social Security number and select **Continue**.



VERIFY YOUR IDENTITY

1 — 2 — 3 — **4** — 5

Enter your Social Security number

Social Security Number (Example: 555555555) *

..... 

The Social Security number is used as a unique identifier to confirm identity. This will not affect your credit score.

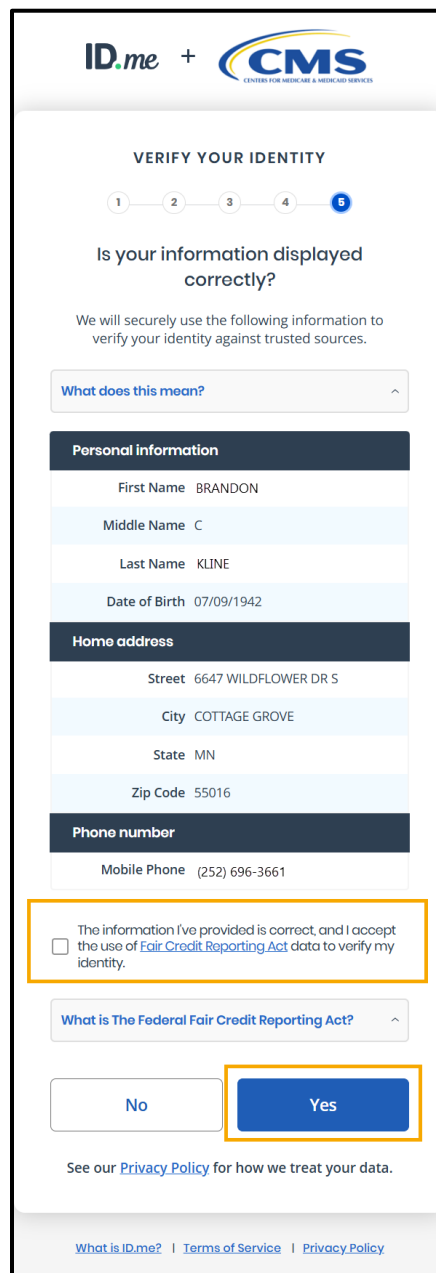
[Back](#) **Continue**

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 23: Verify Your Identity - Enter Your Social Security Number

Step 5. Review the information displayed:

- If the information is correct, check the box to attest to its accuracy and select **Continue**.
- If the information is not correct, select **No**. You will be prompted to attempt identity verification again.



ID.me + CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

VERIFY YOUR IDENTITY

1 2 3 4 5

Is your information displayed correctly?

We will securely use the following information to verify your identity against trusted sources.

[What does this mean?](#)

Personal information

First Name BRANDON

Middle Name C

Last Name KLINE

Date of Birth 07/09/1942

Home address

Street 6647 WILDFLOWER DR S

City COTTAGE GROVE

State MN

Zip Code 55016

Phone number

Mobile Phone (252) 696-3661

☐ The information I've provided is correct, and I accept the use of [Fair Credit Reporting Act](#) data to verify my identity.

[What is The Federal Fair Credit Reporting Act?](#)

No Yes

See our [Privacy Policy](#) for how we treat your data.

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 24: Verify Your Identity -Is Your Information Displayed Correctly?

Step 6. After your identify is verified, you will be directed to the CMS Enterprise Portal “My Portal” page.

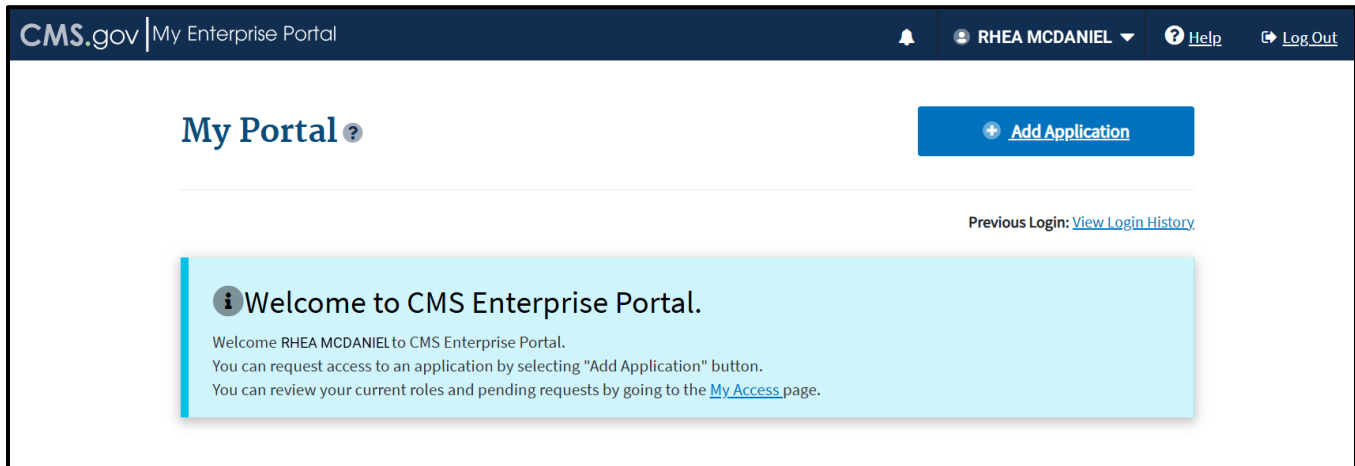


Figure 25: CMS Enterprise Portal “My Portal” Page

If you already have a CMS Portal or Login.gov account, you will be directed to the “Account Found” page. This means CMS located an account that matches your information. You may link your CMS Portal and Login.gov accounts to your new ID.me account to access the applications associated with your existing account(s). Refer to Appendix D for guidance.

Once your identity is verified and your account is created, you may request access to the CMS applications required for your role.

C. Logging In to the CMS Portal Using Your ID.me Account

Once you have created an ID.me account, you can sign in to the CMS Enterprise Portal using your new ID.me credentials.

Step 1. Access the [CMS Enterprise Portal](https://portal.cms.gov) at portal.cms.gov and select **Sign In**.

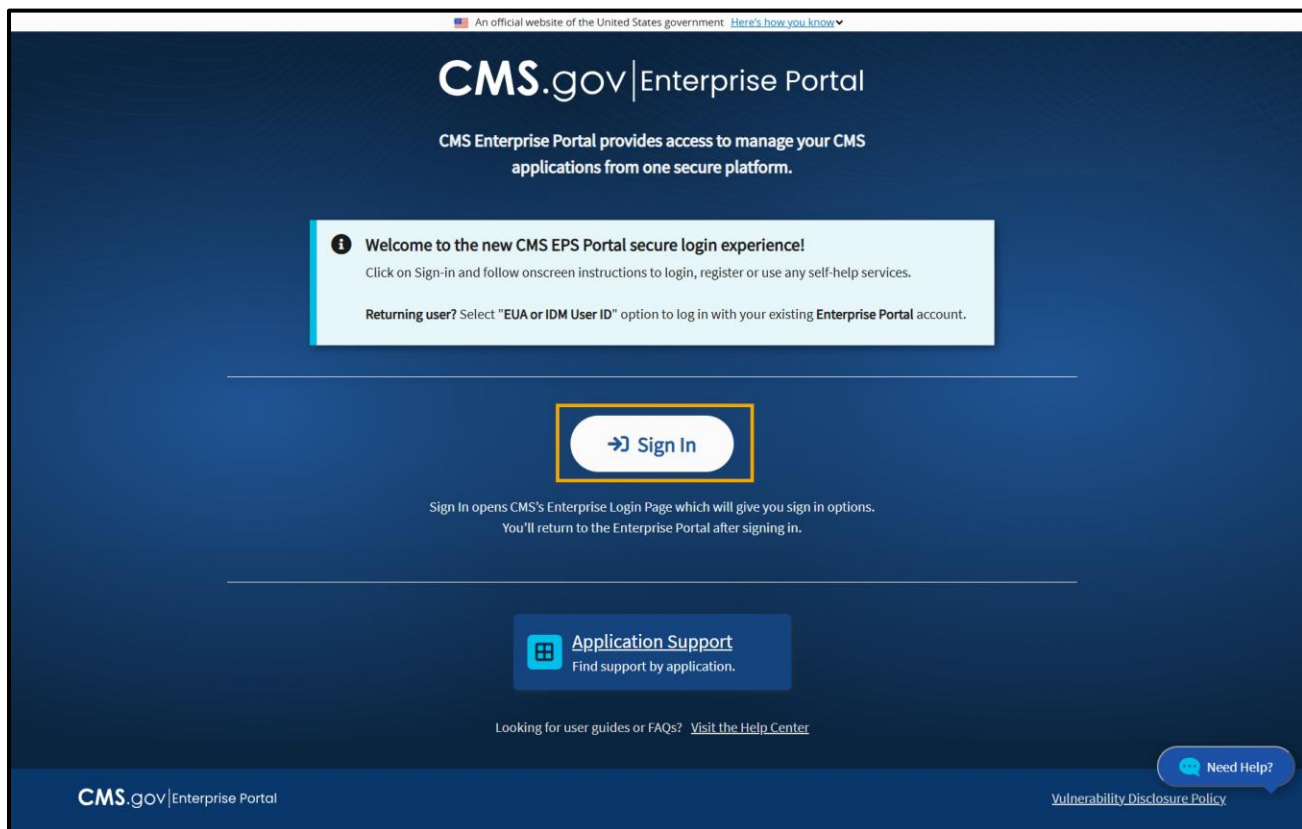
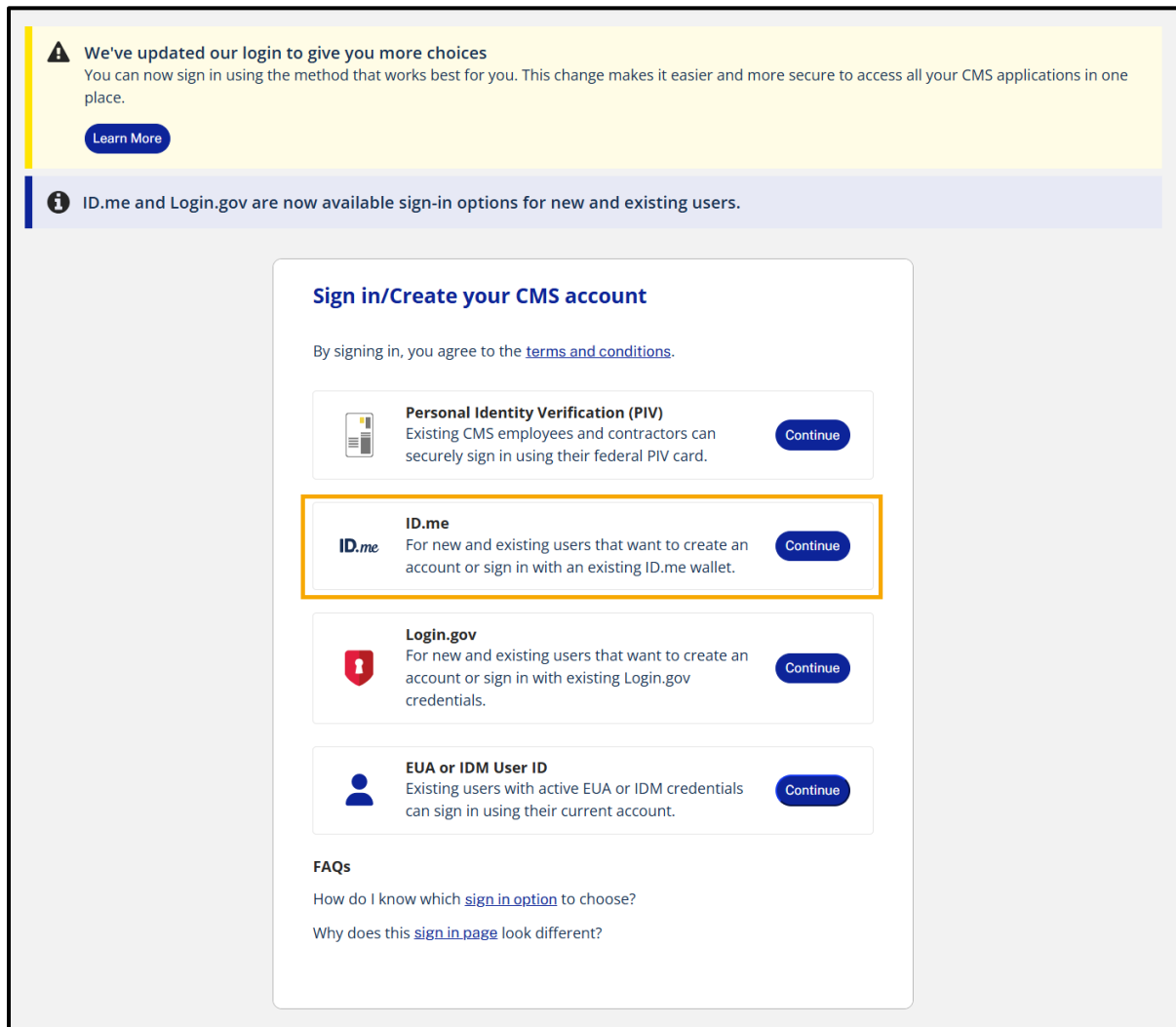


Figure 26: CMS Enterprise Portal Sign In Page

Step 2. The CMS Portal will direct you to the [CMS.gov Identity Management System](#). In the “ID.me” section, select **Continue**.



Sign in/Create your CMS account

By signing in, you agree to the [terms and conditions](#).

Personal Identity Verification (PIV)
Existing CMS employees and contractors can securely sign in using their federal PIV card. [Continue](#)

ID.me
For new and existing users that want to create an account or sign in with an existing ID.me wallet. [Continue](#)

Login.gov
For new and existing users that want to create an account or sign in with existing Login.gov credentials. [Continue](#)

EUA or IDM User ID
Existing users with active EUA or IDM credentials can sign in using their current account. [Continue](#)

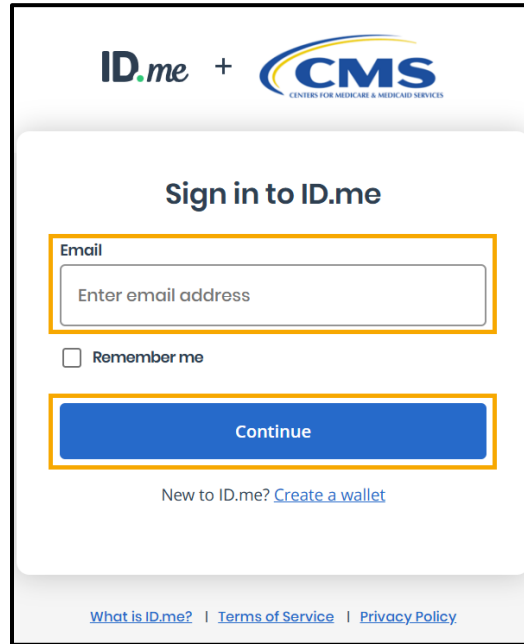
FAQs

How do I know which [sign in option](#) to choose?

Why does this [sign in page](#) look different?

Figure 27: CMS.gov Identity Management –ID.me Section

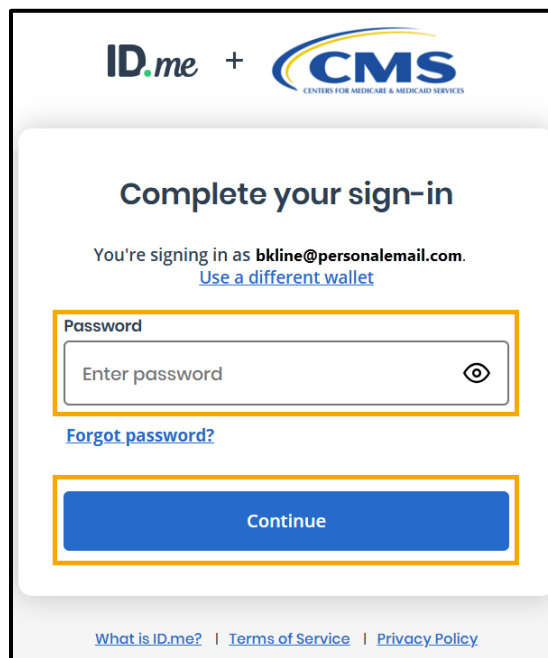
Step 3. Enter your email address and select **Continue**.



The screenshot shows the ID.me sign-in interface. At the top, the ID.me and CMS logos are displayed. The main heading is "Sign in to ID.me". Below this is an "Email" input field with the placeholder text "Enter email address". A "Remember me" checkbox is located below the email field. A blue "Continue" button is positioned below the checkbox. At the bottom of the form, there is a link for "New to ID.me? Create a wallet". The footer contains links for "What is ID.me?", "Terms of Service", and "Privacy Policy".

Figure 28: ID.me – Sign In – Enter Email Address

Step 4. Enter your password and select **Continue**.



The screenshot shows the ID.me "Complete your sign-in" screen. At the top, the ID.me and CMS logos are displayed. The main heading is "Complete your sign-in". Below this, it says "You're signing in as bkline@personalemail.com." with a link "Use a different wallet". A "Password" input field with the placeholder text "Enter password" and a toggle icon is shown. Below the password field is a link for "Forgot password?". A blue "Continue" button is positioned below the password field. The footer contains links for "What is ID.me?", "Terms of Service", and "Privacy Policy".

Figure 29: ID.me - Complete Your Sign-In

Step 5. Complete the multi-factor authentication when prompted.

Step 6. On the “My Portal” page, select **Add Application** to begin your MLMS access request.

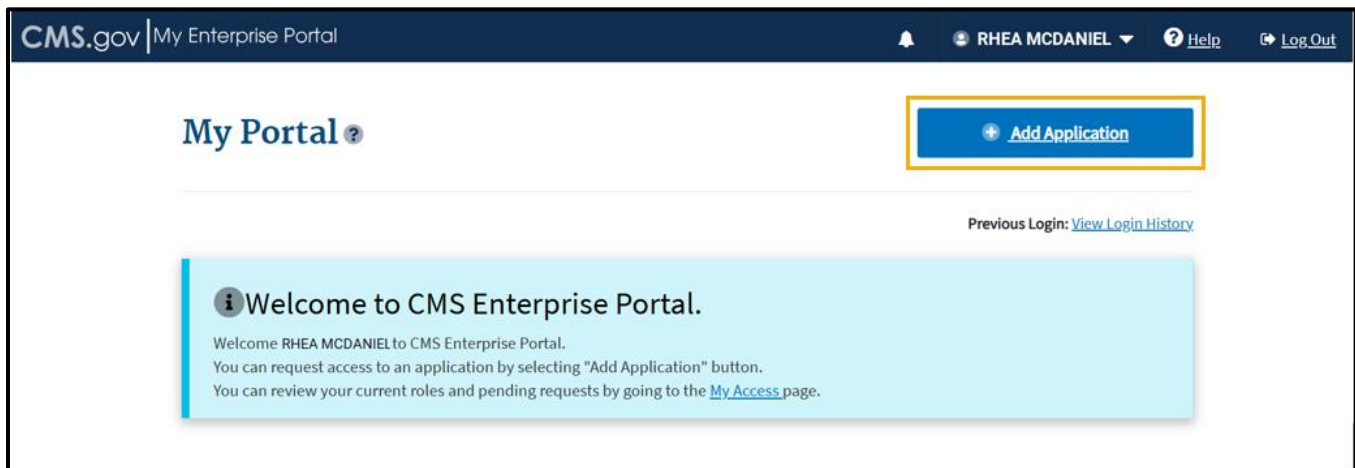


Figure 30: CMS Enterprise Portal “My Portal” Page

Step 7. In the search field or drop-down menu, type “FFM” then select **Federally-Facilitated Marketplace (FFM) Request for MLMS Training Access** from the drop-down menu.

Request Application Access ?

☰ The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1 Select an Application

Select an Application x v

fed

Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

2 Select a Role

3 Enter Reason for Request

Cancel

Figure 31: Select and Application - Request for MLMS Training Access

Step 8. Select **Assister** from the drop-down menu and select **Next**.

Request Application Access ?

☰ The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1 Select an Application

✓ Completed

Edit

✓

Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

2 Select a Role

Select a Role

Agent Broker Training Access

Assister

MSD Helpdesk Contractor FFM

Program Integrity

SBABI Approver

SBABI User

Role

Figure 32: Select a Role – Assister

Step 9. When asked to provide a reason for your request, type **Access assister training**. Select **Submit**.

Request Application Access ?

ⓘ The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1
 Select an Application

✓ Completed
 Edit

✓ Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

2
 Select a Role

✓ Completed
 Edit

✓ Assister

3
 Enter Reason for Request

Reason for Request
 Access assister training

Submit

Cancel

Figure 33: Request Application Access - Enter Reason for Request

Refer to the [Assister Certification Training Resources on REGTAP](#) or the [Assister Certification Training Resources on CMS.gov](#) for additional resources on accessing and completing annual Assister certification training on the MLMS.

If you experience issues signing in, visit the [ID.me Help Center](#).

Appendix A. Accessible Workflow Transcript

This appendix provides a text-only screen-reader-accessible description of the login and access workflow illustrated in [Figure 1](#).

1. **Start at the CMS Enterprise Portal:** Go to: portal.cms.gov.
2. Select **Sign in**.
3. Redirect to **IDM**: After opening the CMS Enterprise Portal, you are redirected to the Identity Management (DIM) System.
4. **Decision Point: Do you have a CMS Portal account?**
 - **If yes:**
 - Select EUA or IDM User ID and log in with your current CMS Portal credentials.
 - After logging in, you are redirected back to the CMS Enterprise Portal “My Portal” page.
 - From the “My Portal” page, request access to the MLMS.
 - **If no:**
 - Continue to the next decision point.
5. **Decision Point: Do you have an existing Login.gov or ID.me account?**
 - **If yes:**
 - Log in using your existing Login.gov or ID.me credentials.
 - After logging in, you are redirected to the CMS Enterprise Portal “My Portal” page.
 - From the “My Portal” page, request access to the MLMS.
 - **If no:**
 - Create a Login.gov or ID.me account.
 - Once your account is created, log in and you will be redirected to the CMS Enterprise Portal “My Portal” page.
 - From the “My Portal” page, request access to MLMS.

Appendix B. Avoiding Creation of a Duplicate Account

New users who create an ID.me account to sign in to the [CMS Portal](#) **should avoid creating more than one ID.me account**. Having multiple accounts can delay access to annual Assister certification training.

This appendix explains how to:

- Determine whether you already have an ID.me account.
- Reset your ID.me password.

If you have ever created an ID.me account, or if you have an existing CMS Portal account, use your existing account to log in.

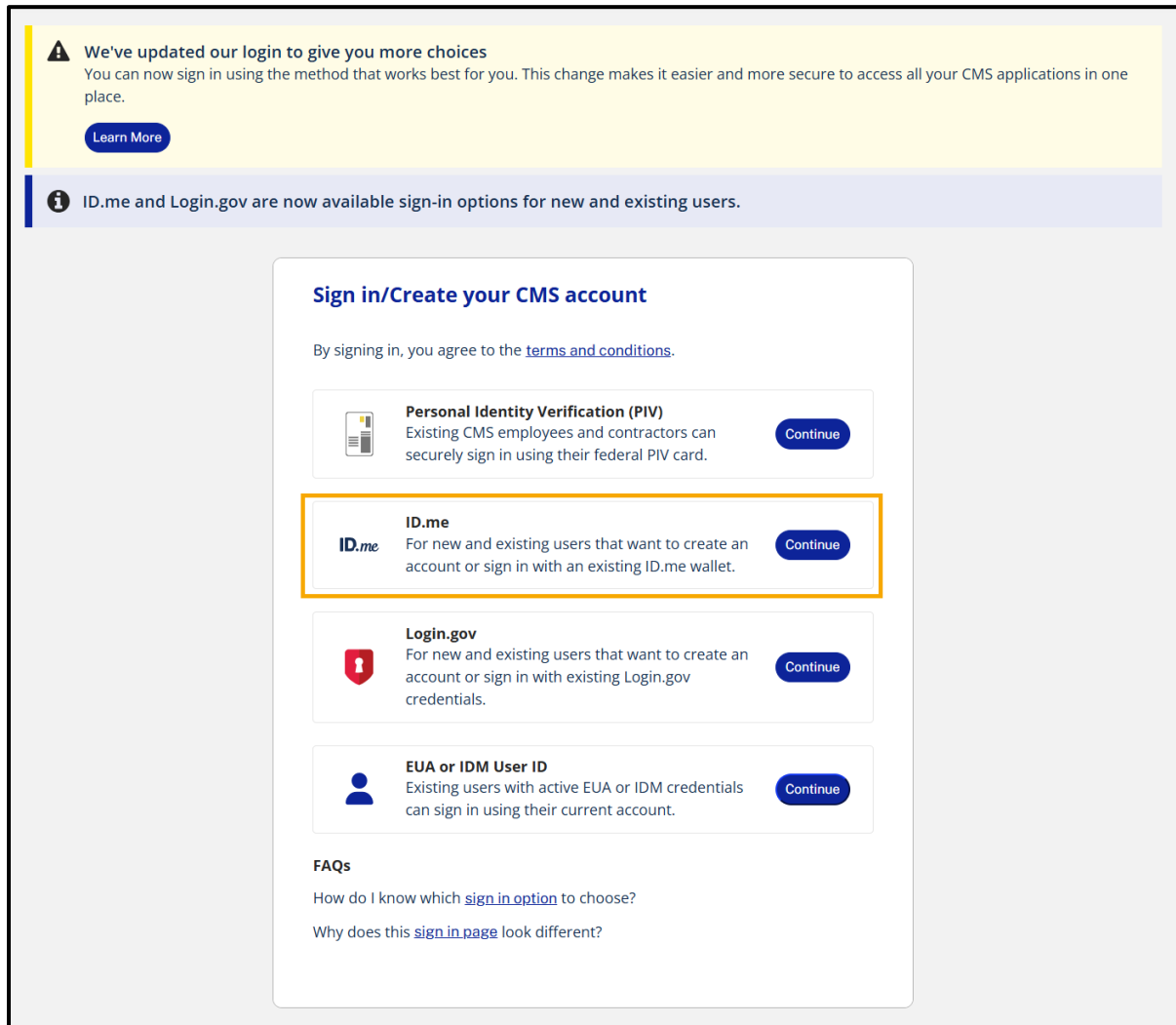
1. Determine Whether You Already Have an ID.me Account

ID.me does not currently allow users to look up the email address associated with an existing account. However, if you try to create a new account, ID.me will prevent you from continuing and display an error message in one of two ways. Depending on the situation, ID.me will either notify you that the email address is already associated with an existing account or that your personal information is already linked to an ID.me account.

1.1 Attempt to Create a New Account Using the Same Email Address

If you try to create a new ID.me account using an email address already associated with an existing ID.me wallet, you will receive an error.

Step 1. Access the CMS Portal at idm.cms.gov and select **Continue** in the “ID.me” section.



The screenshot shows the CMS.gov Identity Management –ID.me Section. At the top, there is a yellow banner with an information icon and the text: "We've updated our login to give you more choices. You can now sign in using the method that works best for you. This change makes it easier and more secure to access all your CMS applications in one place." Below this banner is a blue button labeled "Learn More".

Below the banner is a light blue bar with an information icon and the text: "ID.me and Login.gov are now available sign-in options for new and existing users."

The main content area is titled "Sign in/Create your CMS account". Below the title, it says "By signing in, you agree to the [terms and conditions](#)."

There are four sign-in options, each with an icon, a title, a description, and a "Continue" button:

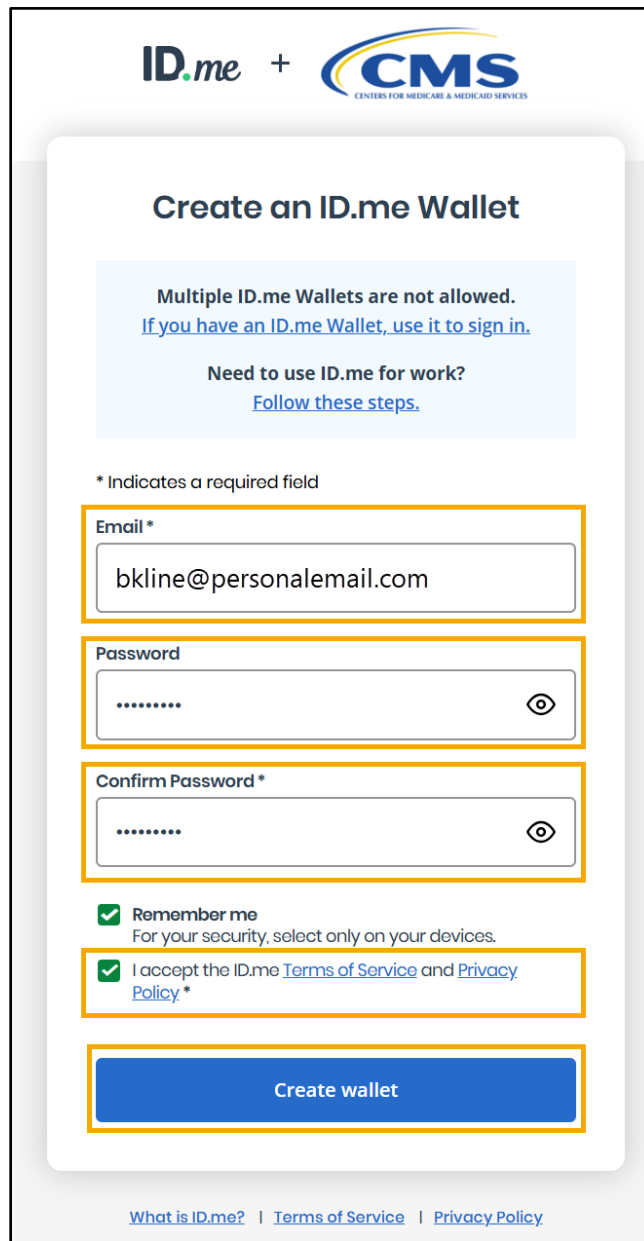
- Personal Identity Verification (PIV)**: Existing CMS employees and contractors can securely sign in using their federal PIV card. (Continue button)
- ID.me**: For new and existing users that want to create an account or sign in with an existing ID.me wallet. (Continue button)
- Login.gov**: For new and existing users that want to create an account or sign in with existing Login.gov credentials. (Continue button)
- EUA or IDM User ID**: Existing users with active EUA or IDM credentials can sign in using their current account. (Continue button)

Below the sign-in options is a section titled "FAQs" with two links: "How do I know which [sign in option](#) to choose?" and "Why does this [sign in page](#) look different?"

Figure 34: CMS.gov Identity Management –ID.me Section

Step 2. On the “Create an ID.me Wallet” page:

- a. Enter your personal email address.
- b. Create a password and enter it in both fields.
- c. Select the Terms of Service and Privacy Policy **checkbox**.



ID.me + **CMS**
CENTERS FOR MEDICARE & MEDICAID SERVICES

Create an ID.me Wallet

Multiple ID.me Wallets are not allowed.
[If you have an ID.me Wallet, use it to sign in.](#)

Need to use ID.me for work?
[Follow these steps.](#)

* Indicates a required field

Email *

bkline@personalemail.com

Password

.....

Confirm Password *

.....

☒ Remember me
For your security, select only on your devices.

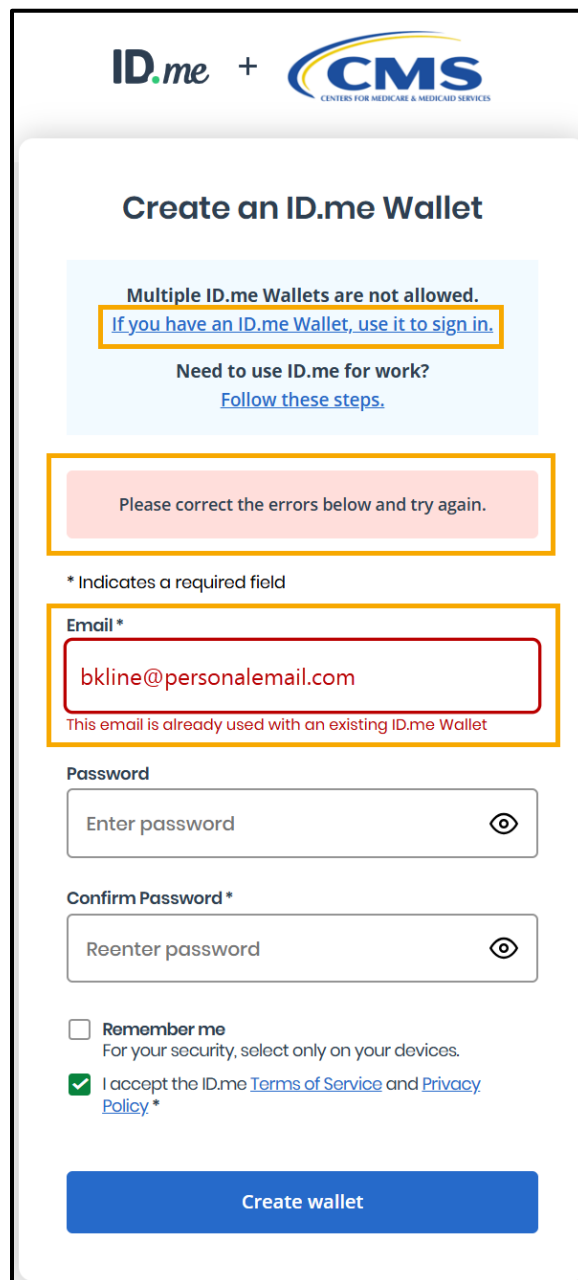
☒ I accept the ID.me [Terms of Service](#) and [Privacy Policy](#) *

Create wallet

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

Figure 35: Create an ID.me Wallet

- Step 3.** After selecting **Submit**, an error message will appear: “Please correct the errors below and try again.” An error message under the **Email** field will state that the email address is already associated with an existing ID.me wallet.
- Step 4.** To sign in, select **If you have an ID.me Wallet, use it to sign in.**



The screenshot shows the 'Create an ID.me Wallet' page. At the top, there are logos for ID.me and CMS (Centers for Medicare & Medicaid Services). Below the logos, the heading 'Create an ID.me Wallet' is displayed. A light blue box contains the message: 'Multiple ID.me Wallets are not allowed. If you have an ID.me Wallet, use it to sign in.' followed by a link 'Need to use ID.me for work? Follow these steps.' Below this is a pink error box with the text 'Please correct the errors below and try again.' A legend indicates that an asterisk (*) denotes a required field. The 'Email *' field contains the text 'bkline@personalemail.com' and is highlighted with a red border. Below the email field, a message states 'This email is already used with an existing ID.me Wallet'. The 'Password' field is labeled 'Enter password' and has a toggle icon. The 'Confirm Password *' field is labeled 'Reenter password' and also has a toggle icon. There is a checkbox for 'Remember me' with the text 'For your security, select only on your devices.' and a checked checkbox for 'I accept the ID.me Terms of Service and Privacy Policy *'. At the bottom is a blue button labeled 'Create wallet'.

Figure 36: Email Used with an Existing ID.me Wallet

1.2 Attempt to Create a New Account with the Same Information

If you attempt to create a new ID.me account with an email address that is **not** on file, but the personal information you enter matches an existing ID.me account, ID.me will detect this and stop the process.

You will receive a message indicating that an account matching your identity already exists.

Some users may be offered the option to merge wallets. If you recognize the email address displayed, select **Merge Accounts** so you can sign in using your new email and password.

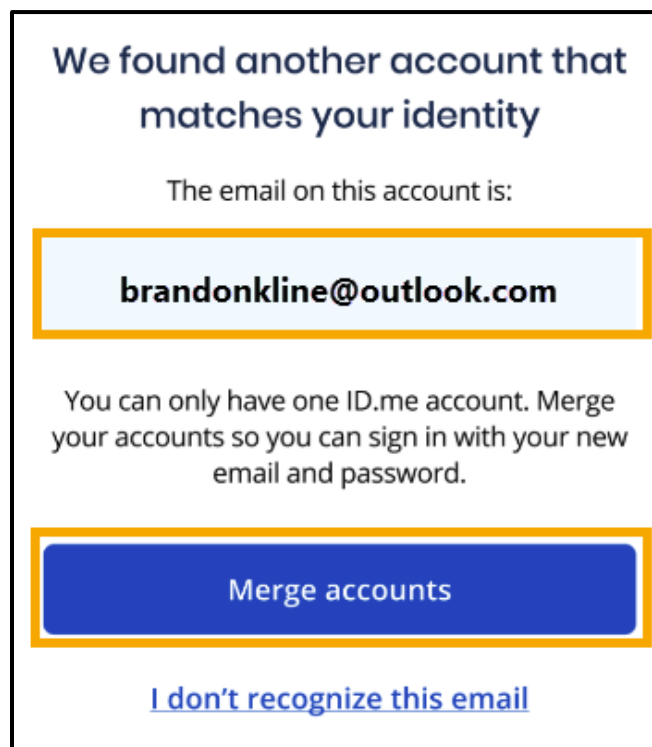
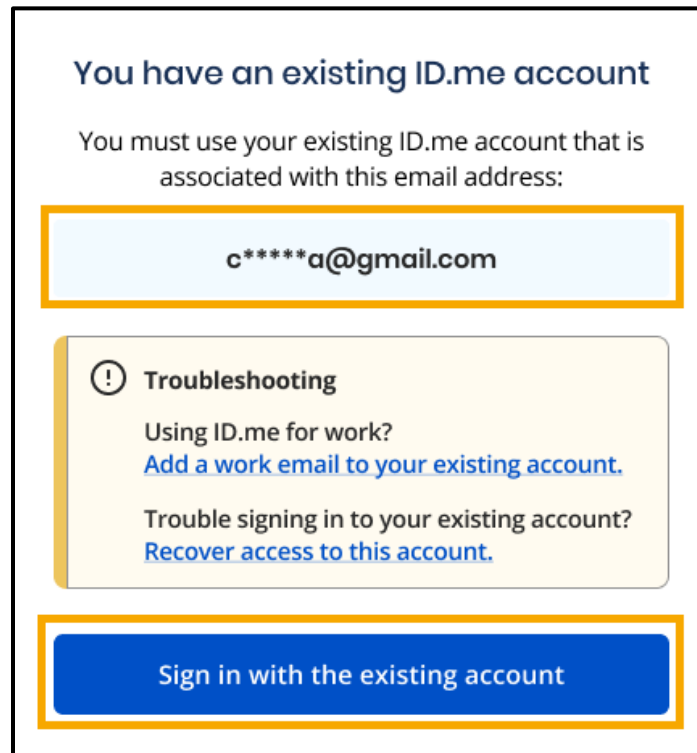


Figure 37: ID.me – Existing ID.me Account – Merge Accounts

If you do not receive the merge option, ID.me will provide an email hint. If you recognize the email, select **Sign in with the existing wallet**.



You have an existing ID.me account

You must use your existing ID.me account that is associated with this email address:

c*****a@gmail.com

! Troubleshooting

Using ID.me for work?
[Add a work email to your existing account.](#)

Trouble signing in to your existing account?
[Recover access to this account.](#)

Sign in with the existing account

Figure 38: Existing ID.me Account - Sign In with the Existing Account

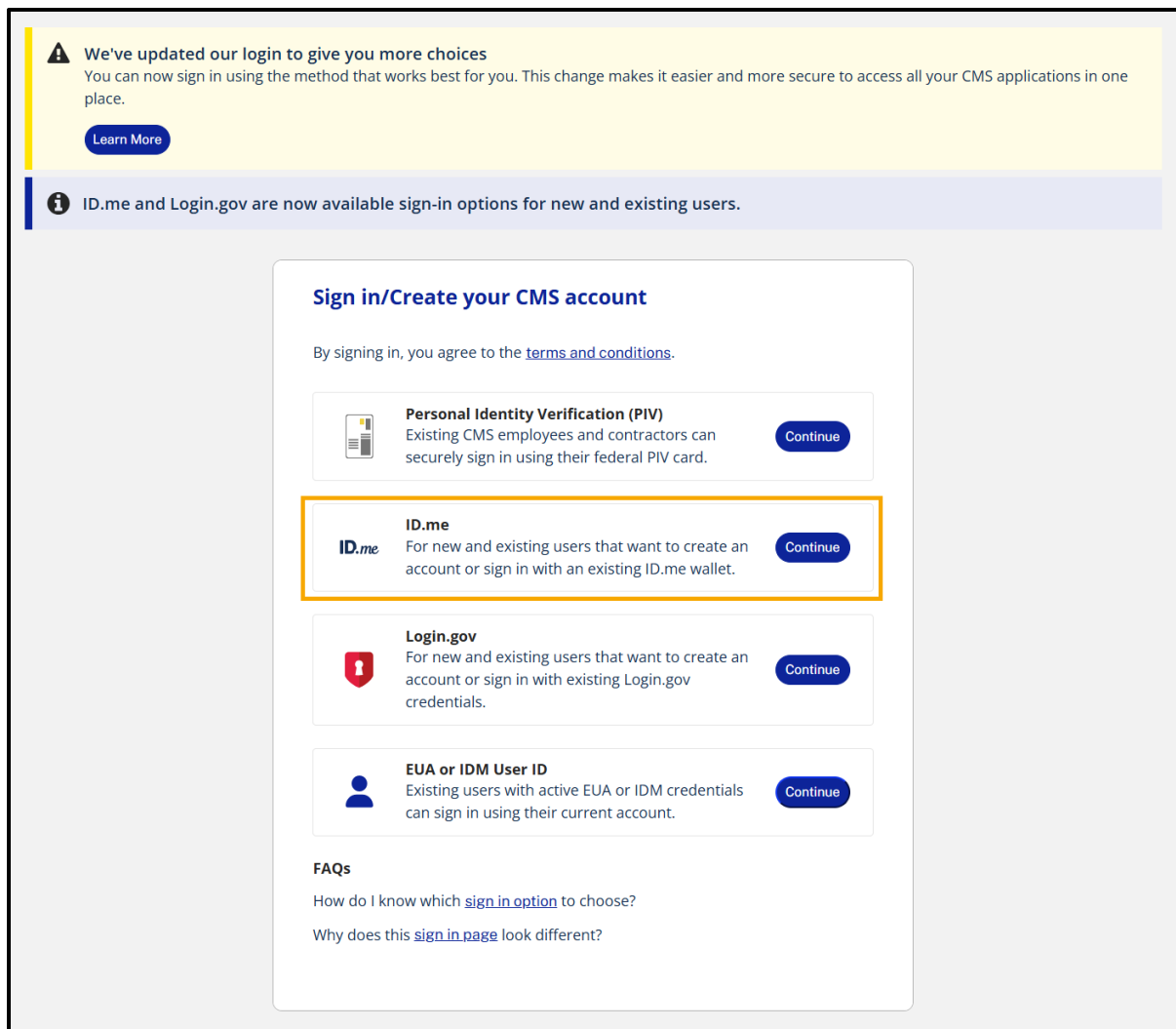
If you do not recognize the email in the email hint, or do not remember creating the verified wallet, [contact ID.me Support](#) for assistance.

2. Reset Your ID.me Password

If you forgot your ID.me password, you may use the **Forgot password?** option on the ID.me “Sign In” page.

To reset your password:

Step 1. Access the CMS IDM Portal at idm.cms.gov and select **Continue** in the “ID.me” section.



The screenshot displays the CMS Identity Management –ID.me Section. At the top, a yellow banner with a warning icon states: "We've updated our login to give you more choices. You can now sign in using the method that works best for you. This change makes it easier and more secure to access all your CMS applications in one place." Below this is a "Learn More" button. A blue banner with an information icon states: "ID.me and Login.gov are now available sign-in options for new and existing users." The main content area is titled "Sign in/Create your CMS account" and includes a link to "terms and conditions." Below this, four sign-in options are listed, each with a "Continue" button. The "ID.me" option is highlighted with an orange border. The options are: "Personal Identity Verification (PIV)" for existing CMS employees and contractors; "ID.me" for new and existing users; "Login.gov" for new and existing users; and "EUA or IDM User ID" for existing users with active credentials. At the bottom, there is an "FAQs" section with two links: "How do I know which sign in option to choose?" and "Why does this sign in page look different?"

Sign in/Create your CMS account

By signing in, you agree to the [terms and conditions](#).

Personal Identity Verification (PIV)
Existing CMS employees and contractors can securely sign in using their federal PIV card. [Continue](#)

ID.me
For new and existing users that want to create an account or sign in with an existing ID.me wallet. [Continue](#)

Login.gov
For new and existing users that want to create an account or sign in with existing Login.gov credentials. [Continue](#)

EUA or IDM User ID
Existing users with active EUA or IDM credentials can sign in using their current account. [Continue](#)

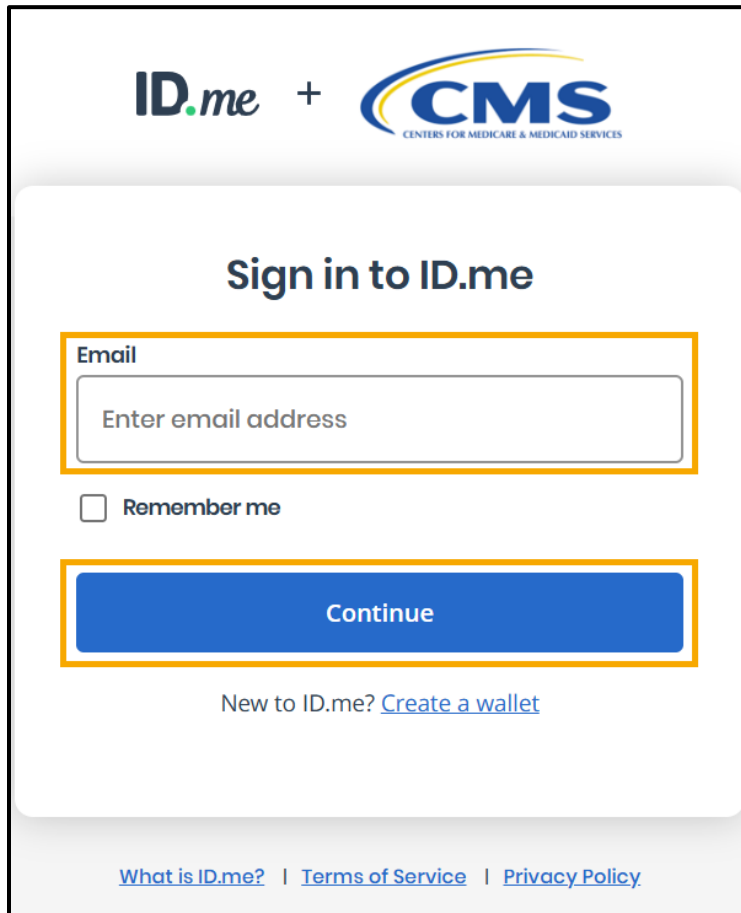
FAQs

How do I know which [sign in option](#) to choose?

Why does this [sign in page](#) look different?

Figure 39: CMS.gov Identity Management –ID.me Section

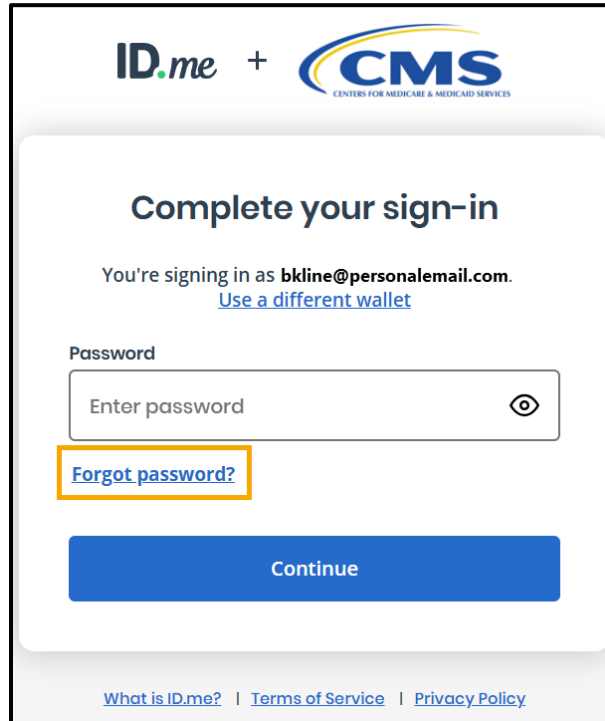
Step 2. Enter your email address and select **Continue**.



The image shows a sign-in interface for ID.me, integrated with CMS. At the top, the ID.me logo is followed by a plus sign and the CMS logo. Below this, the heading "Sign in to ID.me" is centered. A text input field labeled "Email" contains the placeholder text "Enter email address". Below the input field is a checkbox labeled "Remember me". A large blue button labeled "Continue" is positioned below the checkbox. At the bottom of the form, there is a link that says "New to ID.me? [Create a wallet](#)". At the very bottom of the page, there are three links: "[What is ID.me?](#)", "[Terms of Service](#)", and "[Privacy Policy](#)".

Figure 40: ID.me – Sign In – Enter Email Address

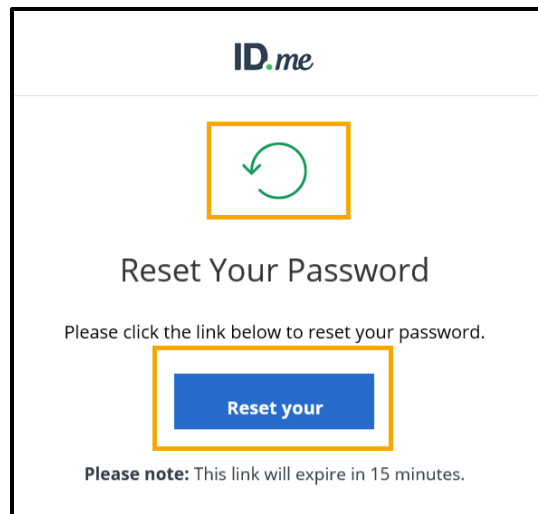
Step 3. Select Forgot Password?



The screenshot shows the ID.me + CMS sign-in interface. At the top, the ID.me and CMS logos are displayed. Below them, the text "Complete your sign-in" is centered. Underneath, it says "You're signing in as **bkline@personalemail.com**." with a link "Use a different wallet". A "Password" label is above a text input field containing "Enter password". To the right of the input field is an eye icon. Below the input field, the link "Forgot password?" is highlighted with an orange box. A blue "Continue" button is positioned below the link. At the bottom, there are links for "What is ID.me?", "Terms of Service", and "Privacy Policy".

Figure 41: ID.me – Forgot Password? Link

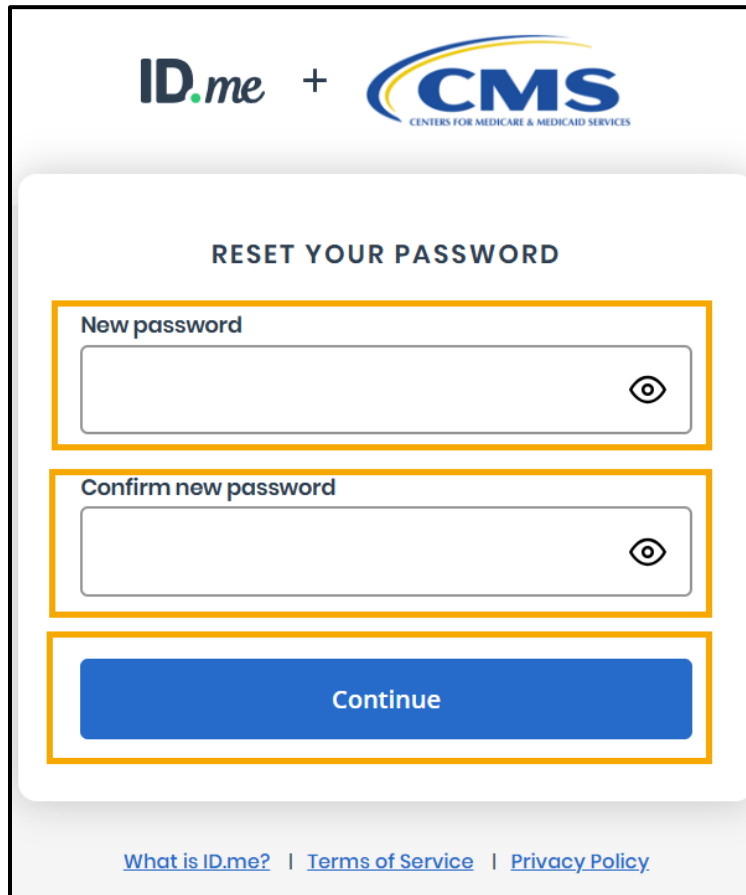
- Enter your email address to receive a password reset link.
- Open the email from hello@ID.me and select **Reset your password**.



The screenshot shows an email from ID.me titled "Reset Your Password". At the top is the ID.me logo. Below it is a green circular arrow icon inside an orange box. The text "Reset Your Password" is centered. Below that, it says "Please click the link below to reset your password." A blue button with the text "Reset your" is highlighted with an orange box. At the bottom, a note states: "Please note: This link will expire in 15 minutes."

Figure 42: Reset Your Password Email

- c. Enter and confirm your new password. Select **Continue**.



The image shows a web form for resetting a password. At the top, it features the 'ID.me' logo followed by a plus sign and the 'CMS' logo (Centers for Medicare & Medicaid Services). Below the logos, the heading 'RESET YOUR PASSWORD' is centered. The form contains three main sections, each outlined with a thick orange border: 1) A 'New password' section with a text input field and a toggle icon (an eye inside a circle) on the right. 2) A 'Confirm new password' section with a text input field and a toggle icon on the right. 3) A blue rectangular button labeled 'Continue'. At the bottom of the form, there are three links: 'What is ID.me?', 'Terms of Service', and 'Privacy Policy'.

Figure 43: ID.me – Enter New Password and Confirm New Password

After your password is reset, you will return to the sign-in page to enter your email address and complete the login process.

Appendix C. Identity Verification Errors

Sometimes users may experience issues when verifying their identity. Follow the instructions for each error to resolve the issue as quickly as possible. This appendix describes the most common identity verification errors.

For additional troubleshooting guidance, visit the [Technical Troubleshooting](#) page on the [ID.me Help Center](#).

1. Identity Verification Error Codes E4301, E4302, or E4303

Errors **E4301**, **E4302**, or **E4303** usually mean that your personal information - such as your name, phone number, or address - recently changed and no longer matches public records.

To fix this issue:

Step 1. Select **Retry**.

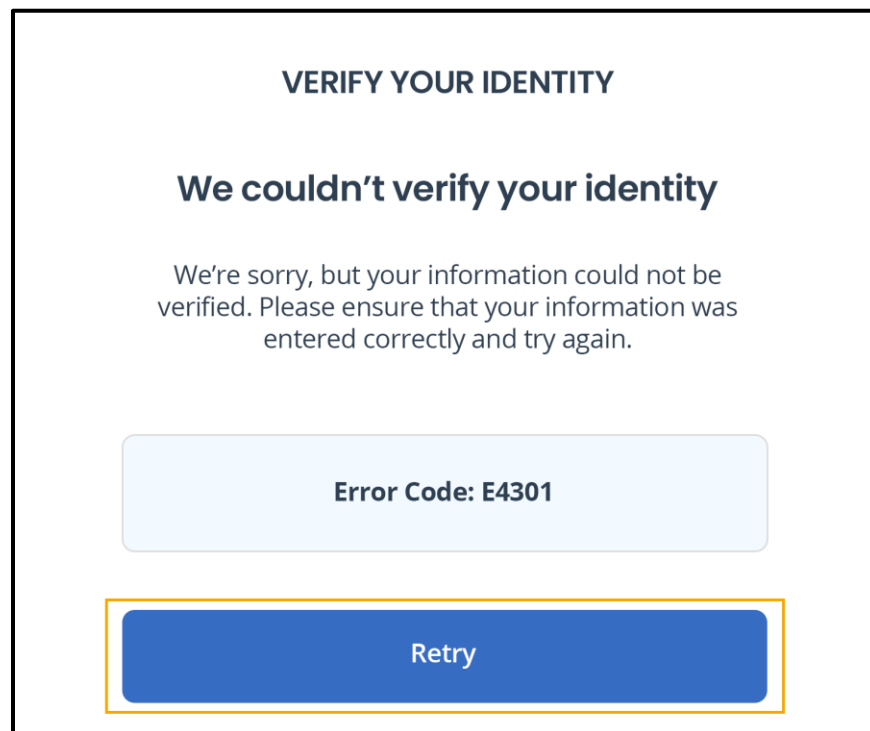


Figure 44: ID.me – We Couldn't Verify Your Identity

Step 2. On the "Is your information displayed correctly?" page, review the information. If any item is incorrect, select **Edit** next to it and update the information.

Step 3. If prompted, select your verification method and repeat the identity verification again.

2. More Information Requested

If your identity cannot be verified using the Self-Service option, ID.me may prompt you to complete verification through an extended video call with a Video Chat Agent.

You will need one of the following:

- Two primary identity documents, or
- One primary document and one secondary document

For a full list of acceptable documents, visit [Primary and secondary identification documents](#).

You may also be asked to submit additional documentation to:

- Verify your [Social Security number](#)
- Confirm your current address
- Document a [legal name change](#)

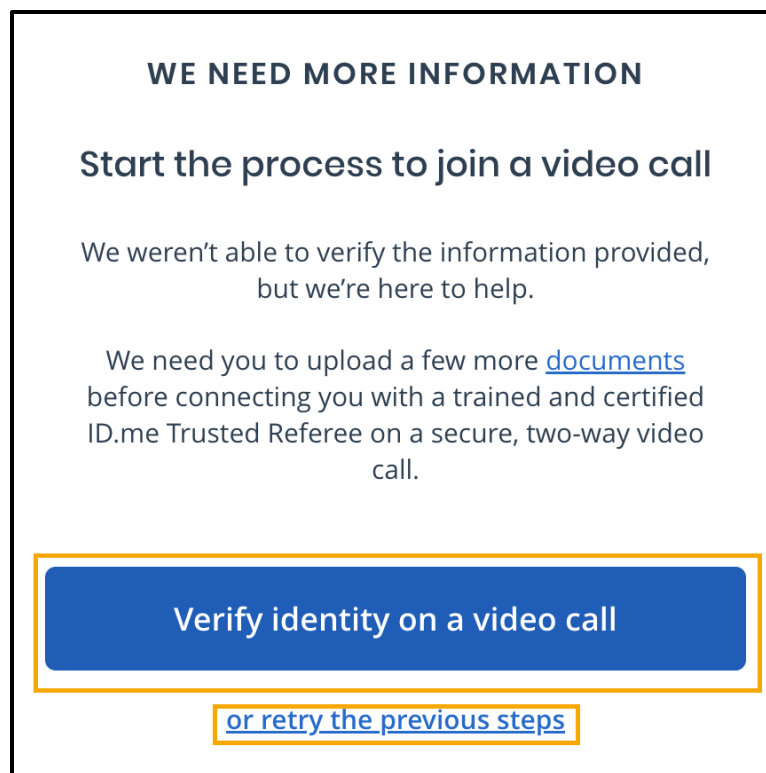


Figure 45: We Need More Information – Verify Identity on a Video Call

For detailed instructions, review [Verifying with an extended video call](#) on the [ID.me Help Center](#).

3. Mismatched Information

A “Mismatched Information” error means the personal information you entered does not match the information already stored in your ID.me Wallet.

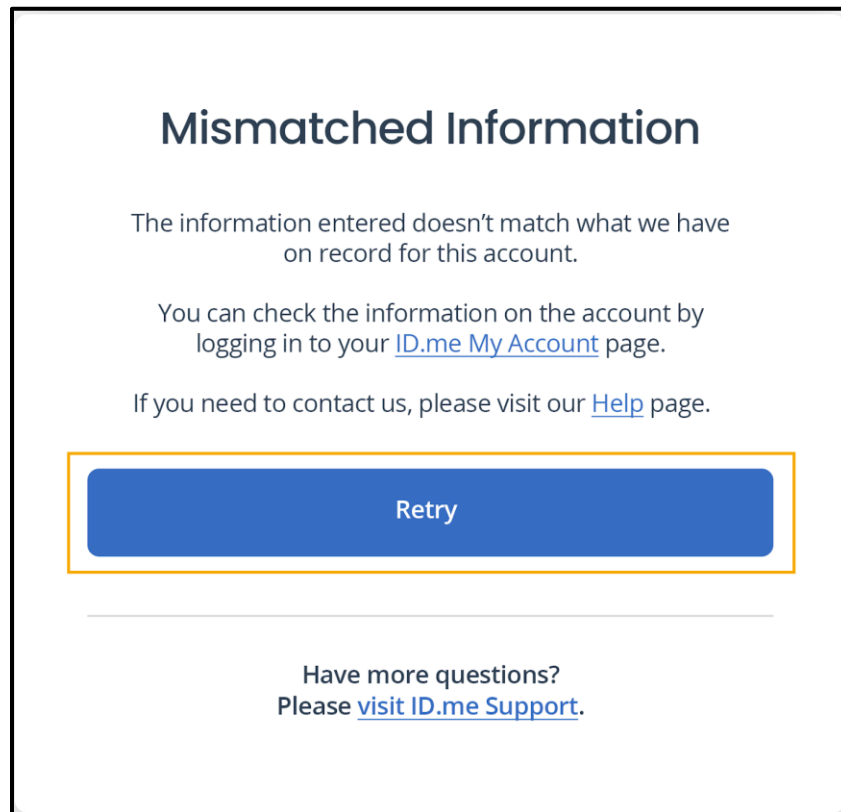


Figure 46: Identity Verification Error - Mismatched Information

Review the information on your ID.me profile. Ensure your name is spelled correctly and matches exactly what is displayed in your ID.me Wallet.

- If your name is correct: Select **Retry** and attempt verification again.
- If your name is incorrect, due to:
 - **Legal name change:** [Request a name change](#).
 - **Incorrect Spelling:** [Request a correction](#).

After confirming or updating your name, attempt identity verification again.

If you continue experiencing issues after completing these steps, [contact ID.me Support](#).

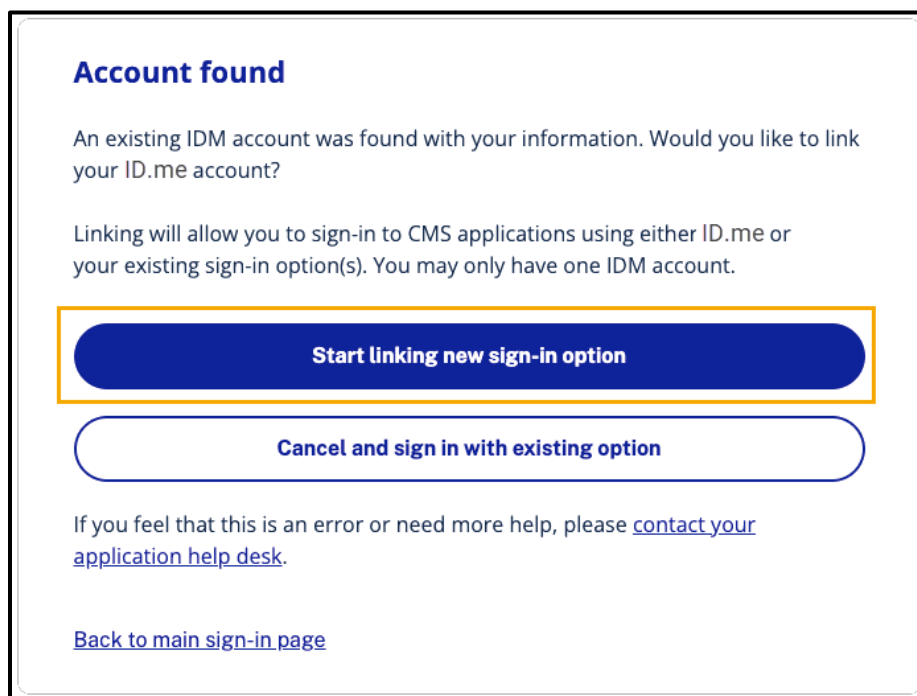
Appendix D. Linking your ID.me and CMS Portal Accounts

If you have an ID.me account – either existing or newly created – and a CMS Portal or Login.gov account, you can link them. Linking accounts allows your permissions and applications to be shared between them.

After creating an ID.me account, or when accessing the CMS Portal for the first time with an existing ID.me account, you may be directed to the “Account Found” page. This page appears when the system finds one or more accounts that match your information. You will have the option to link your accounts or continue without linking.

To link your ID.me account to your existing account(s):

Step 1. On the “Account found” page, select **Start linking new sign-in option**.



Account found

An existing IDM account was found with your information. Would you like to link your ID.me account?

Linking will allow you to sign-in to CMS applications using either ID.me or your existing sign-in option(s). You may only have one IDM account.

Start linking new sign-in option

Cancel and sign in with existing option

If you feel that this is an error or need more help, please [contact your application help desk](#).

[Back to main sign-in page](#)

Figure 47: Account Found - Start Linking New Sign-In Option

If you select **Cancel and sign in with existing option**, you must use your existing login credentials. You will **not** be able to access the CMS Portal using your ID.me account.

- Step 2.** Select **Sign in** next to the account you want to link. Only the accounts with information that matches your ID.me profile will appear.

terms and conditions.' Below this is a box containing a user icon, the text 'IDM User ID', and 'Existing users with active IDM credentials can sign in using their current account.' To the right of this text is a blue 'Sign in' button with a yellow border. At the bottom left is a '< Back' link." data-bbox="236 227 752 479"/>

Verify existing account

To link these accounts, please sign in using your existing IDM sign-in option. This ensures that only you can access your information.

By signing in, you agree to the [terms and conditions](#).



IDM User ID
Existing users with active IDM credentials can sign in using their current account.

Sign in

[< Back](#)

Figure 48: Verify Existing Account - Sign In

- Step 3.** Complete the sign-in process for the selected account.

- Step 4.** After signing in, the “Review Profile Updates” page will display the user profile information from your ID.me account that will be added to your profile, as well as the information from your existing account that will be removed during the linking process. (The system overwrites your older information and replaces it with your new information.) Updating your existing profile is permanent and cannot be undone.
- Select **Confirm and link** to finish linking your accounts.
 - Select **Cancel account linking and continue to IDM Home** to stop the process.

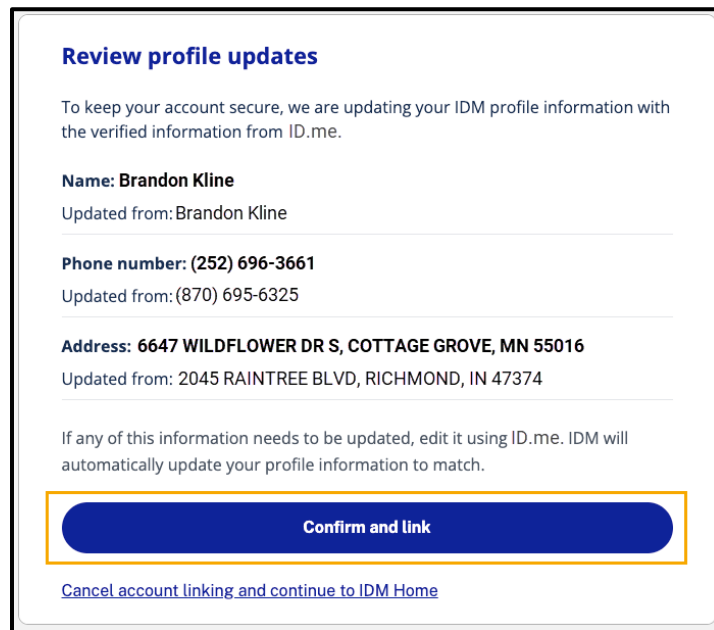


Figure 49: Review Profile Updates - Confirm and Link

- Step 5.** A confirmation message will indicate that your ID.me account is now linked to your existing profile. You may sign in using your ID.me credentials or any other existing login method. Select **Continue to IDM Home**.

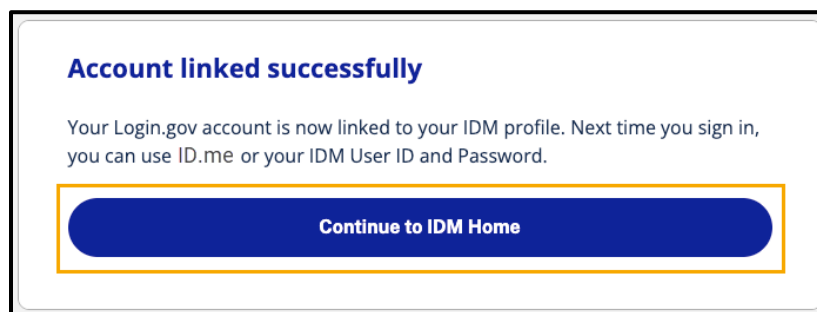


Figure 50: Account Linked Successfully - Continue to IDM Home

Version History

Version	Description of Change(s)
August 2026	Initial guide for creating ID.me accounts