Centers for Medicare & Medicaid Services

Enterprise Portal Help Desk User Guide

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1. Introduction

The Centers for Medicare & Medicaid Services (CMS) Enterprise Portal project supports the implementation of a viable and effective portal program. The essence of the CMS Enterprise Portal strategy is the user interface (UI) presented by a portal as an "Integration Glass," a single window through which users may see and access information and applications from multiple sources, based on each individual user's roles and permissions. A portal combines and displays content and forms from multiple applications and information sources, supports users with navigation and cross-enterprise search tools, supports simplified sign-on, and uses role-based access and personalization to present each user with only relevant content and applications. Portal benefits include enhanced productivity, efficiency, workflows, communication, and the exchange of ideas among CMS user communities.

CMS Enterprise Portal allows for a common gateway for applications, data query, analysis, and reporting needs for a variety of users. Users can collaborate; share queries and reports; use browser-based reporting applications; manipulate data and information; and save that data and information in the Portal layer, all without having to exit the Portal to use other applications. This flexible, convenient, and comprehensive access to data promotes activities across the CMS enterprise, and increases the overall return on investment in the modern CMS data environment. CMS established the Enterprise Portal to provide business partners with a means to create a single user ID that they can use to access one or more CMS applications.

This user guide provides the information necessary for Help Desk users to effectively use CMS Enterprise Portal. This document will be updated as new features and functionality are added to CMS Enterprise Portal.

There are no privacy or security concerns for this document because it does not contain any Personal Health Information (PHI) or Personally Identifiable Information (PII).

1.1. Users of CMS Enterprise Portal

CMS Enterprise Portal users typically fall into three functional categories:

- **Application End Users** – Users of CMS applications. End Users do not approve the role requests that are made by other users.
- **Approver Users** – Users who review and approve application role requests that are submitted by the End Users, Help Desk Users, and other Approvers. Some Approvers also assist in user management.
- **Help Desk Users** – Users who provide Tier 1 application Help Desk support to application Approvers and End Users. For many applications, Help Desk users also approve the role requests of other users.

The CMS Enterprise Portal Help Desk structure consists of two tiers. Applications are responsible for maintaining their own Tier 1 Help Desk to assist their application end users. Tier 1 capabilities and functions are discussed in later sections. Tier 1 Help Desks may escalate issues beyond their capabilities to the Tier 2 Help Desk.

This user guide provides the information necessary for any user that has Help Desk privileges (i.e., Help Desk users and some Approver users) in their support of the CMS Enterprise Portal users.

1.2. Conventions

This document provides figures and corresponding narrative to describe how to use CMS Enterprise Portal. There are no specific stylistic commands or syntax used within this document. Typically, a direction or step is described, followed by a screen print that shows the corresponding action or result.

1.3. Cautions & Warnings

CMS Enterprise Portal Help Desk users are provisioned by the Enterprise User Administration (EUA) process and the CMS Enterprise Portal process. Users must have their CMS identifier (ID) added to the relevant Portal job code or role prior to accessing CMS Enterprise Portal.

2. Getting Started

This section provides information about setting up, accessing, navigating, and exiting CMS Enterprise Portal.

2.1. Set-up Considerations

CMS Enterprise Portal users are provisioned either by the Enterprise User Administration (EUA) process or the CMS Enterprise Portal setup process. CMS Enterprise Portal users can only view the applications to which they have been granted access through the respective job code(s) or approved role request(s).

The following additional considerations optimize access to CMS Enterprise Portal:

Use one of the following browsers with JavaScript enabled:

- Google Chrome
- Microsoft Edge (Chromium)
- Mozilla Firefox
- Apple Safari

Note: CMS Enterprise Portal no longer supports Microsoft’s Internet Explorer web browser.

Please be sure to disable pop-up blockers (if allowed by your organization) and disable your Chrome browser extensions as these may impact the use of the CMS Enterprise Portal.

The only computer input device needed to access CMS Enterprise Portal is a keyboard; a mouse is not required, although it is recommended.

2.2. Login Flows

Users create their CMS Enterprise Portal account and request access to applications and roles through the CMS Enterprise Portal. Once a user has created their account and has been granted a role in Enterprise Portal, there are two login flows that exist within CMS Enterprise Portal. Both login flows require users to login using the Login portlet of the CMS Enterprise Portal home page, although how they get to CMS Enterprise Portal will differ.

2.2.1. Non-Portal Integrated CMS Applications

Users of a CMS application, not integrated with CMS Enterprise Portal, access their application by navigating directly to their application’s URL. When the user attempts to login, they will be redirected to the CMS Enterprise Portal login screen. Upon successful authentication, the user is then returned to their application’s URL and will be allowed access to the application. Approvers and Help Desk personnel who need to access the “Help Desk/Manage Users” functionality must navigate directly to the Login portlet of the CMS Enterprise Portal home page, instead of their application’s URL.

2.2.2. Portal-Integrated CMS Applications

Users of a Portal-integrated CMS application navigate to the CMS Enterprise Portal login screen, and upon successful authentication, access their application by selecting the application's tile from the **My Portal** home page.

Note

In order for an application tile to appear on the **My Portal** home page, you must have an approved role in that application.

2.3. Accessing the System

To access CMS Enterprise Portal, open a browser window (refer to the list of approved browsers in *Section 2.1 - Set-up Considerations*) and type the following URL into the address bar: https://portal.cms.gov (Internet) or https://portal.cms.cmsnet (CMS VPN or CMS network).

The system displays the CMS Enterprise Portal public home page, as shown in *Figure 1: CMS Enterprise Portal Public Home Page*.

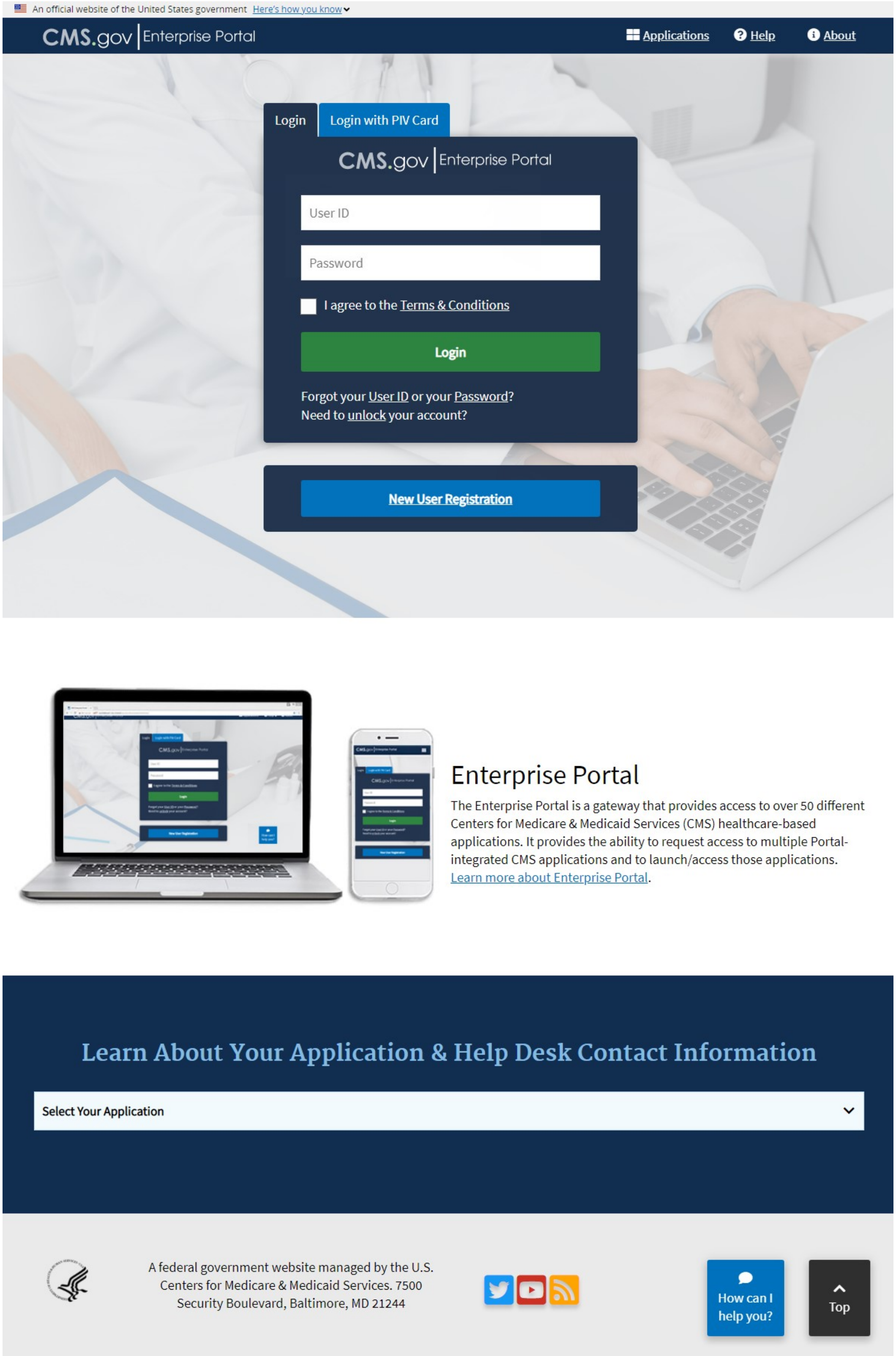

Figure 1: CMS Enterprise Portal Public Home Page

2.4. Logging In

The following instructions demonstrate the login process for users.

1. Navigate to the CMS Enterprise Portal public home page.
   The CMS Enterprise Portal login screen displays, as shown in *Figure 2: Login Portlet on CMS Enterprise Portal Public Home Page*.

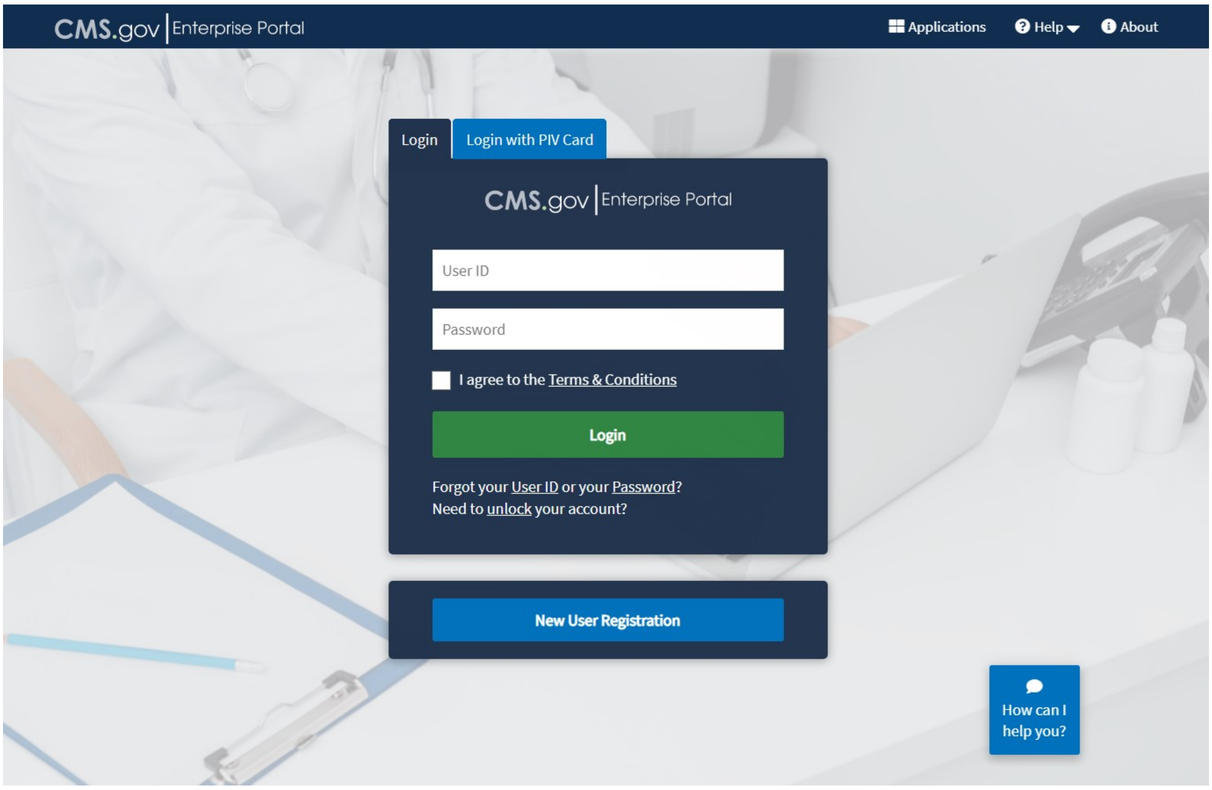

Figure 2: Login Portlet on CMS Enterprise Portal Public Home Page

2. Enter the CMS user ID in the **User ID** field.

3. Enter the CMS password in the **Password** field.

4. Agree to the terms and conditions and click **Login**.
   Upon entering a user name and password correctly, an additional screen is displayed, as shown in *Figure 3: Login with MFA Device*.

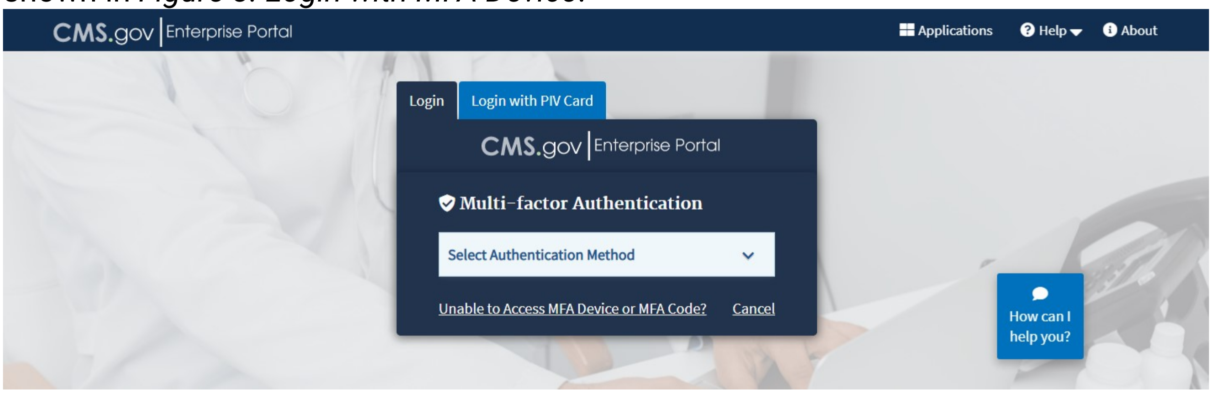

Figure 3: Login with MFA Device

5. Select your desired Multi-Factor Authentication (MFA) device from the **Select Authentication Method** drop-down list, as shown in *Figure 4: Registered MFA Device Options*. You will be presented with the MFA Devices that you have previously setup.

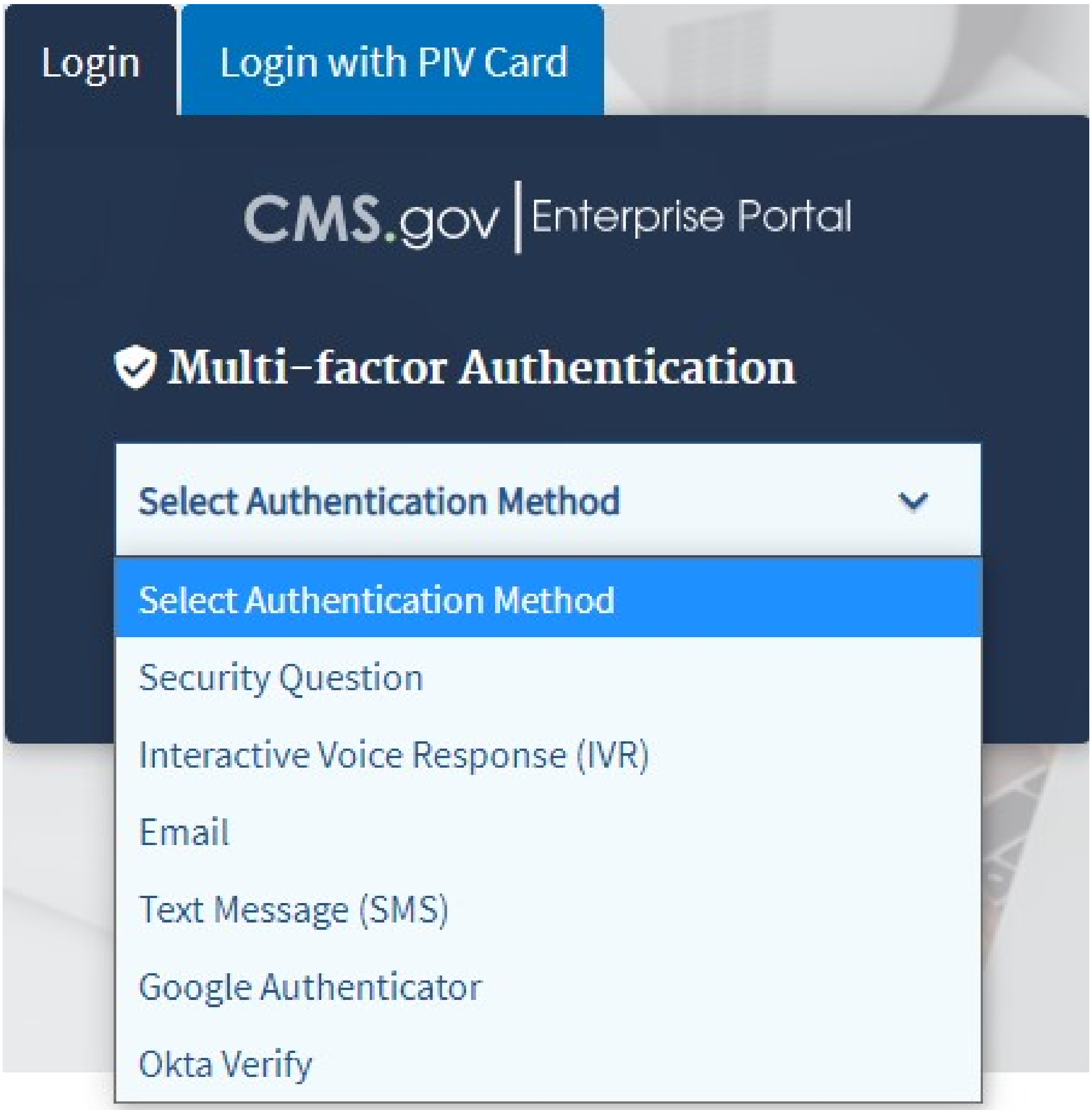

Figure 4: Registered MFA Device Options

6. Follow the onscreen instructions to complete MFA.
   After you have successfully completed the MFA verification process, you will be redirected to the **My Portal** home page, as shown in *Figure 5: My Portal Home Page*.

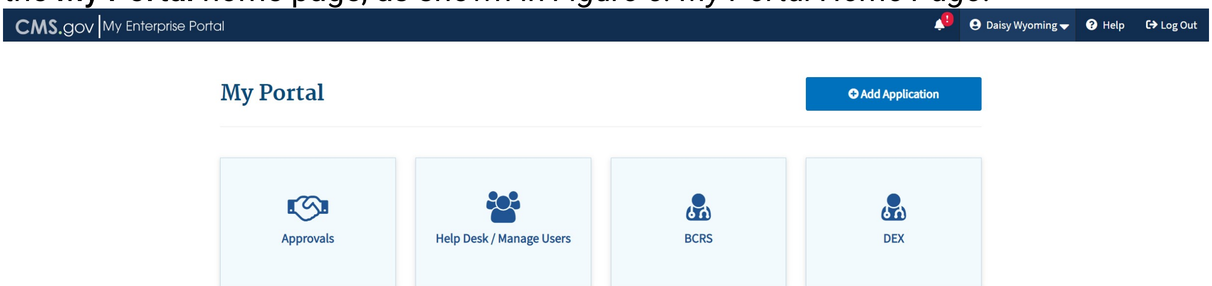

Figure 5: My Portal Home Page

2.5. Session Timeout

Session timeout occurs if users do not perform any action on the CMS Enterprise Portal site and remain idle for 30 minutes. When this happens, the session will automatically be terminated, and the user will be required to login again.

3. Help Desk Functions

CMS Application teams are responsible for managing their own Tier 1 Help Desk to assist their application end users. Tier 1 Help Desk users and some Approver roles can perform the following functions in CMS Enterprise Portal:

- Search User
  - Application Search
  - Enterprise Search
- View User Details
- Cancel Pending Role Request
- Update User Level of Assurance (LOA)
- Reset Password
  - Via Email
  - Manual Password Reset
- View List of MFA Devices
- Remove Role/Attribute
- Suspend User
- Unsuspend User
- Unlock User Account
- Update User Email Address

Note

The functions available for use by a user with Help Desk privileges depend on the role of the Help Desk user and the current status of a target user. For instance, some Help Desk users are not allowed to update users' LOA and a target user can only be unlocked if they currently have the status of Locked Out.

3.1. Launching Help Desk/Manage Users

Users with Help Desk privileges within CMS Enterprise Portal can access the "Help Desk/Manage Users" functionality by clicking the **Help Desk/Manage Users** tile on the **My Portal** home page, as shown in *Figure 6: Accessing Help Desk/Manage Users via My Portal Home Page*.

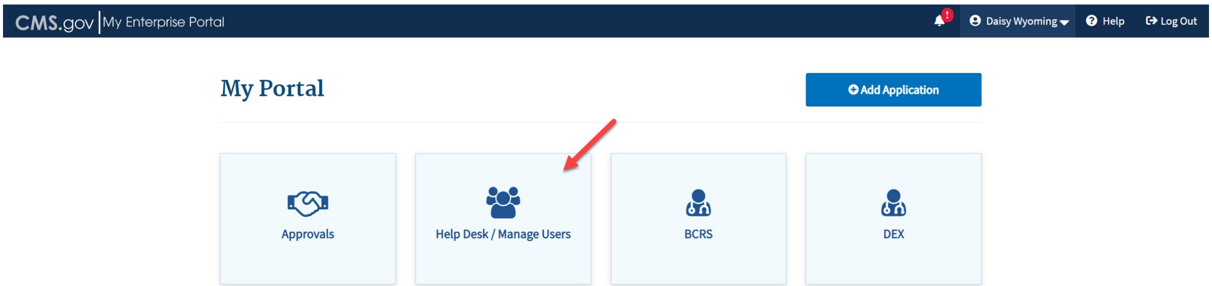

Figure 6: Accessing Help Desk/Manage Users via My Portal Home Page

Alternatively, the **Help Desk/Manage Users** page can be accessed by clicking **My Apps** in the top navigation bar (on all pages except for the **My Portal** page) and then selecting **Help Desk/ Manage Users** under the **IDM** menu, as shown in *Figure 7: Accessing the Help Desk/Manage Users Page via My Apps*.

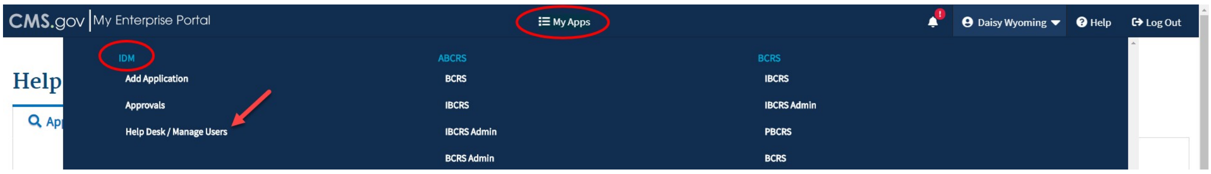

Figure 7: Accessing the Help Desk/Manage Users Page via My Apps

Clicking the **Help Desk/Manage Users** tile takes you to the **Help Desk/Manage Users** page, as shown in *Figure 8: Help Desk/Manage Users Page*. The **Application Search** tab is selected by default.

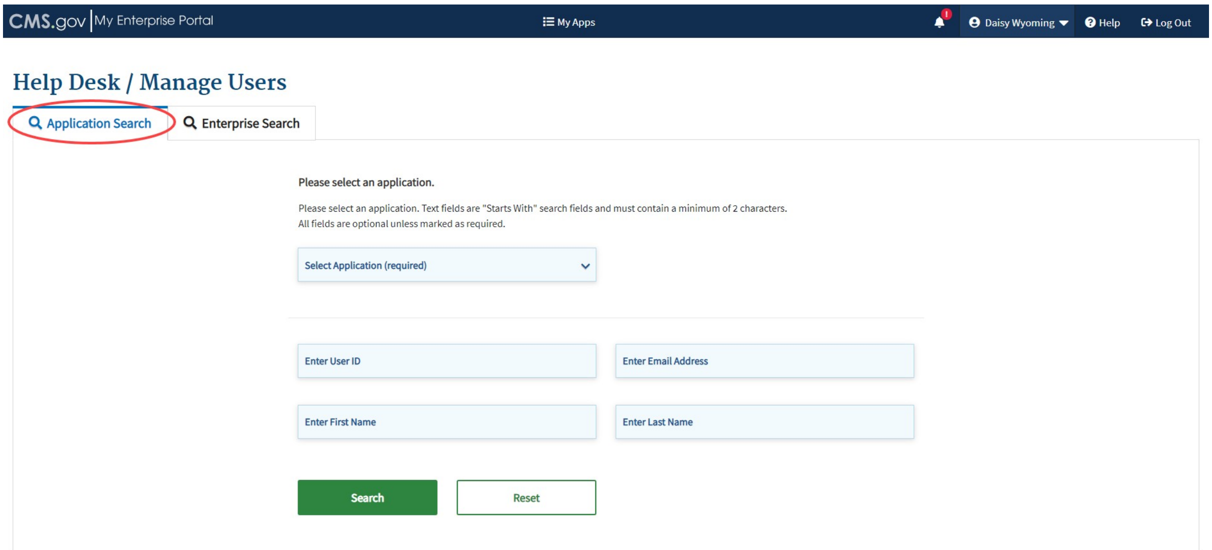

Figure 8: Help Desk/Manage Users Page

The **Application Search** tab provides the ability to perform a search for users within an application, while the **Enterprise Search** tab provides the ability to search for users across the entire system.

4. User Search Options

This section outlines how users with Help Desk privileges can perform a search for users in CMS Enterprise Portal.

In general, Tier 1 Help Desk users have the ability to search for users within their application (Application Search) as well as the ability to search across the entire system (Enterprise Search). Tier 2 Help Desk users only have the ability to search for users across the entire system (Enterprise Search).

In general, Approvers only have the ability to search for users within their application (Application Search).

4.1. Search Parameters

When performing an Application Search, the Help Desk users and Approvers can search for user accounts using any one of the following search fields, as shown in *Figure 9: Application Search Parameters*.

- Application
- Application Role
- User ID
- Email Address
- First Name
- Last Name

Note

Application is a required field and at least one other search criteria must be used. All text search fields must contain a minimum of 2 characters.

The Application Search does a "starts with" search. For example, a search for first name of "**ary**" will not find "**Mary**" or "**Maryanne**", but will find "**Aryana**".

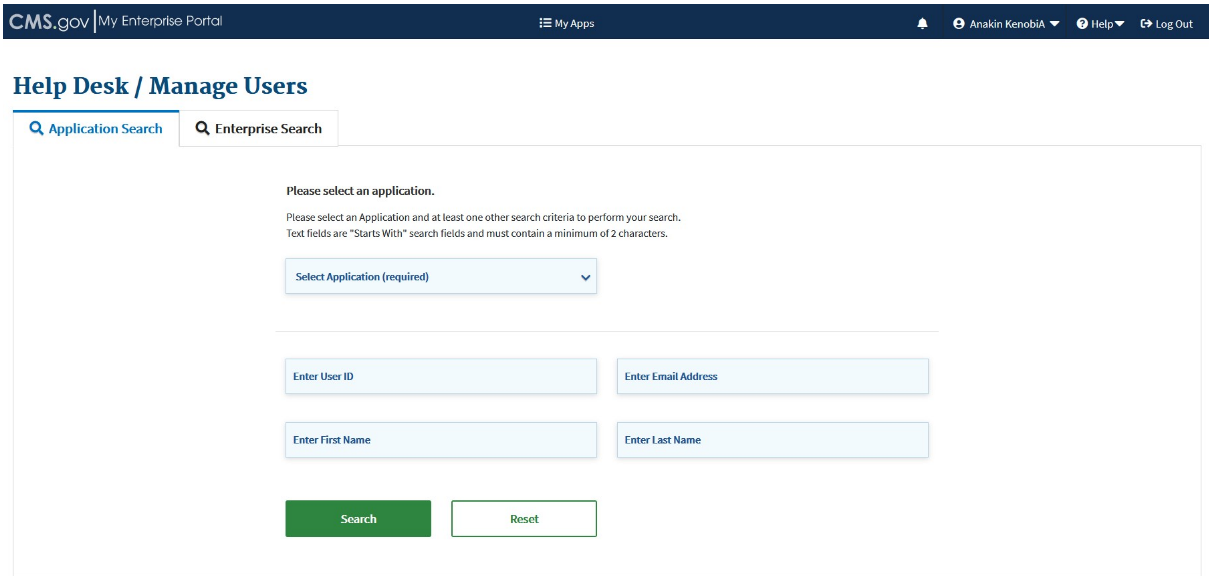

Figure 9: Application Search Parameters

When performing an Enterprise Search, Help Desk users can search for users using the following search fields:

- User ID
- Email Address
- First Name
- Last Name
- Birth Month, Birth Day, Birth Year
- State
- Last 4 Digits of SSN

Note

You must enter User ID OR Email Address OR both (First Name AND Last Name) for Enterprise Search. All other search fields are optional. All text search fields must contain a minimum of 2 characters.

The Enterprise Search does a "starts with" search. For example, a search for first name of "**ary**" will not find "**Mary**" or "**Maryanne**", but will find "**Aryana**".

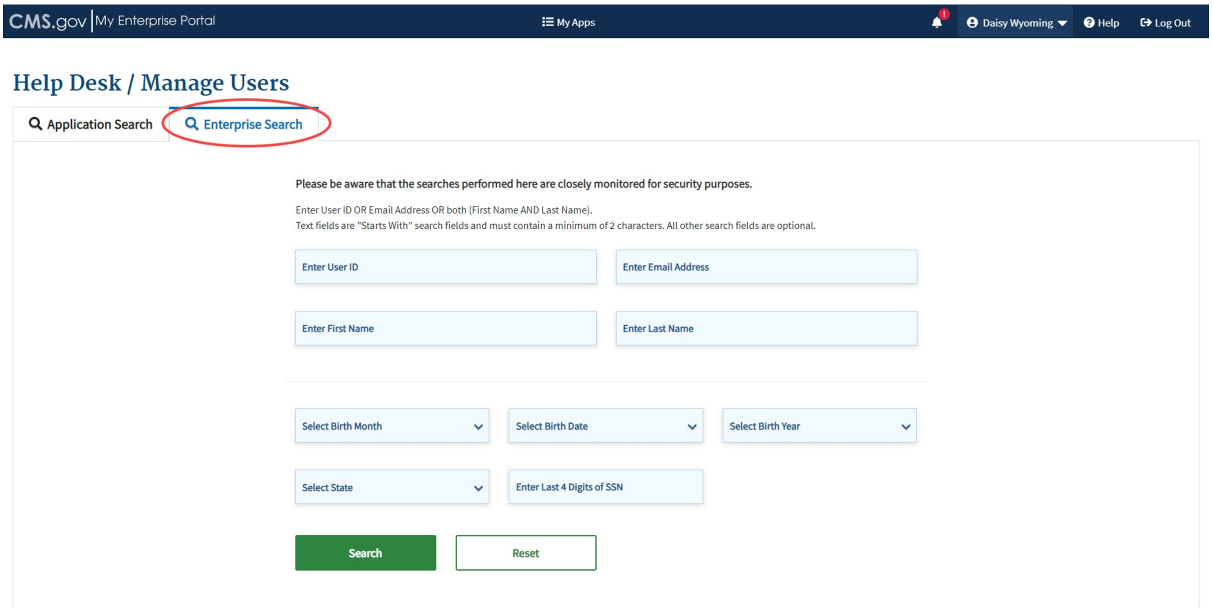

Figure 10: Enterprise Search Parameters

4.2. Performing Application Search

Help Desk users and Approvers should utilize the Application Search function to search for users that have a role within one of your applications.

'Application' is the only required field in Application Search, but the other available fields can be used to further refine the search.

Note

If a Help Desk user or Approver has access to only one application, that application will be pre-selected, and the 'Application' field will be disabled.

The following are the instructions on how to search for a user using Application Search.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. From the **Application Search** tab, select an application, as shown in *Figure 11: Application Search – Selecting an Application*. For example, select **DEX (Data Exchange) System**.

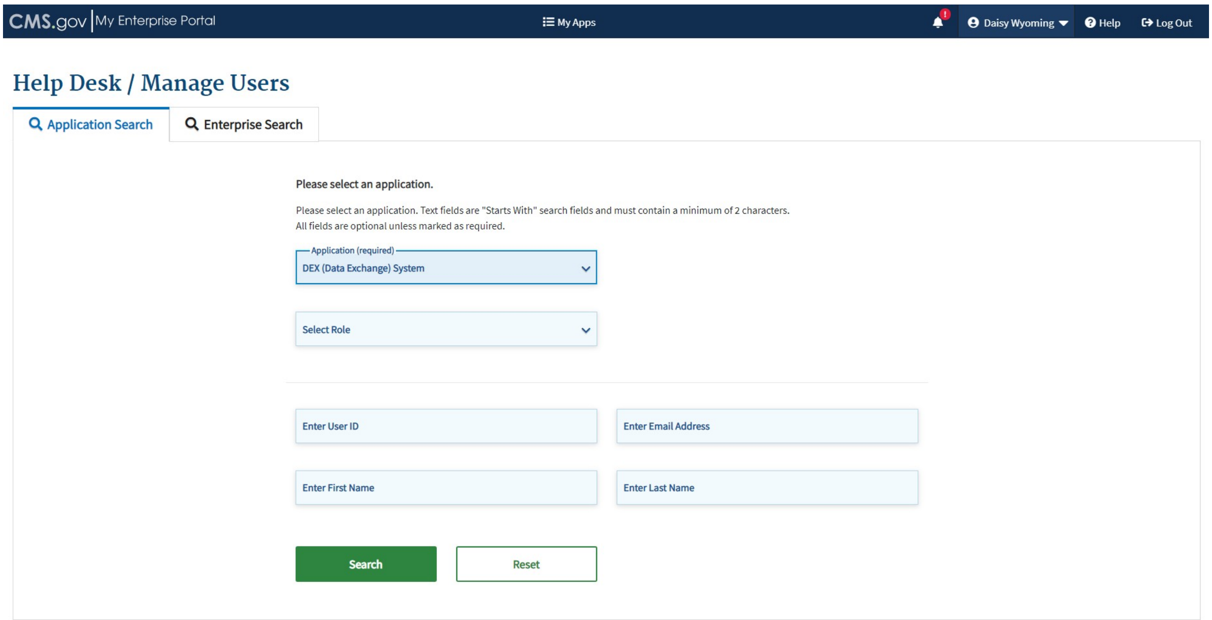

Figure 11: Application Search – Selecting an Application

5. At this point, you can click the **Search** button to execute the search. Alternately, you can select a role and/or other search fields to further refine the search, as shown in *Figure 12: Application Search – Selecting Role Attributes*, and then click **Search**.

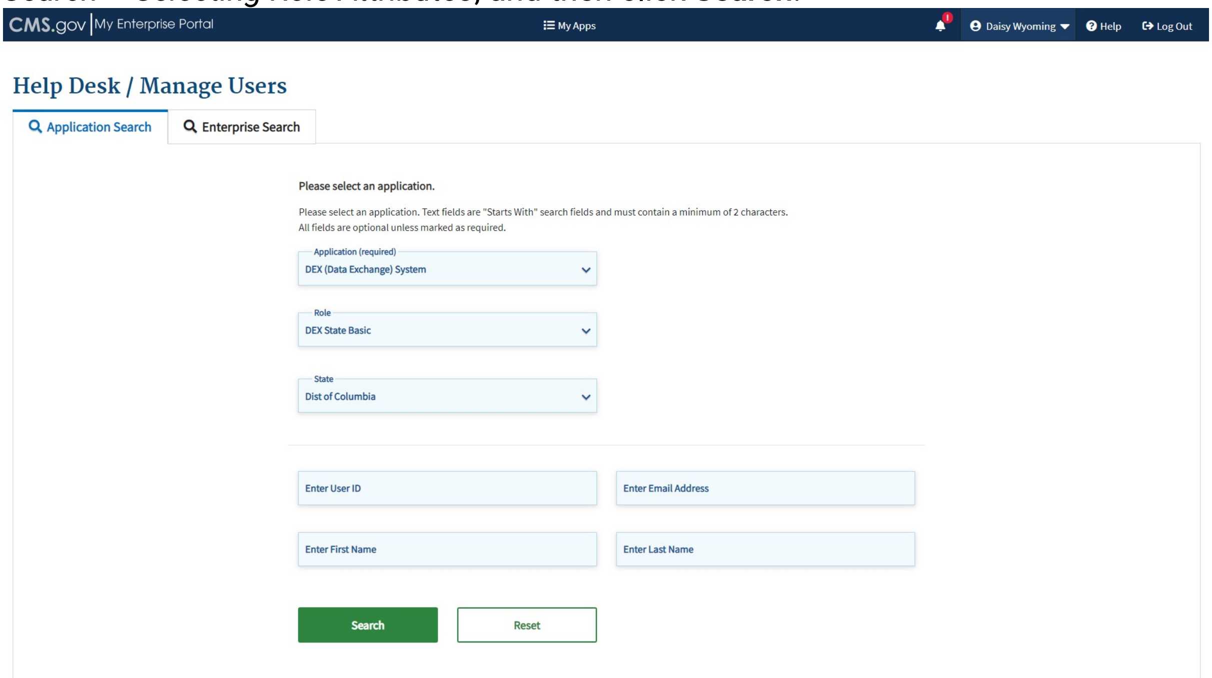

Figure 12: Application Search – Selecting Role Attributes

The search results are returned, as shown in *Figure 13: Application Search Results*. Results can be sorted by User ID, User First/Last Name, or Roles. Results can be filtered by User ID, First Name, and Last Name.

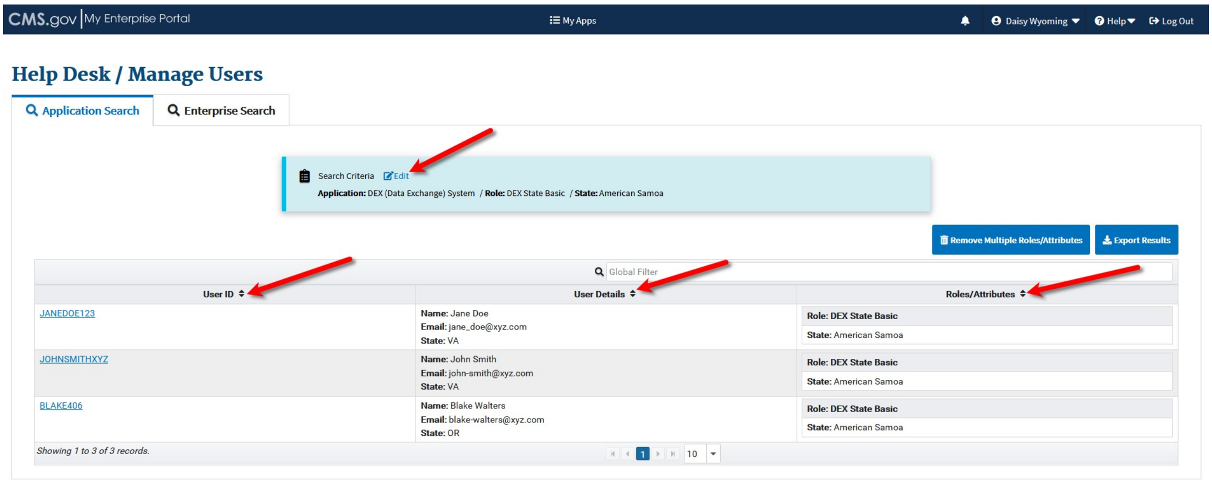

Figure 13: Application Search Results

6. If your search does not return the desired users, you can refine the search criteria by clicking the **Edit** button, as shown in *Figure 13: Application Search Results*, to return and alter the search criteria.

Note

The maximum number of users returned in a search is limited to 50 users. If the user that you are looking for is not returned in the original search you should include additional information in the search criteria (i.e. User ID, First Name, Last Name, or Email Address).

4.3. Performing Enterprise Search

Help Desk users can utilize the Enterprise Search function to search for users across the entire system, regardless of application affiliation. This search is especially helpful when an end user does not yet have a role, the user contacts the wrong Help Desk, or is uncertain with which application they are associated.

The following are the instructions on how to search for a user using Enterprise Search.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Click the **Enterprise Search** tab.
   The **Enterprise Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 14: Help Desk/Manage Users – Enterprise Search*.

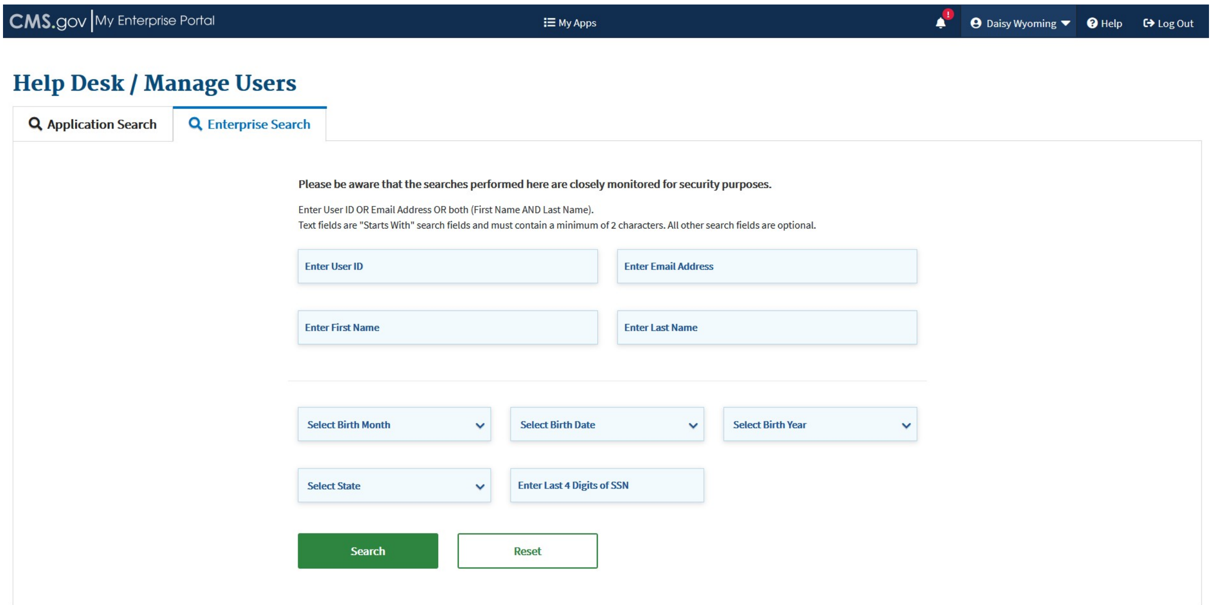

Figure 14: Help Desk/Manage Users – Enterprise Search

5. Enter at least two characters into:
   - the **User ID** field, OR
   - the **First Name** and **Last Name** fields, OR
   - the **Email Address** field.

6. After you have entered at least two characters into one of the above fields, then you can enter information into any of the other search criteria (e.g., Birth Month, Birth Day, Birth Year, State, or Last 4 Digits of SSN) as needed. After your search criteria is completely entered, as shown in *Figure 15: Enterprise Search via User ID*, you can then click **Search**.

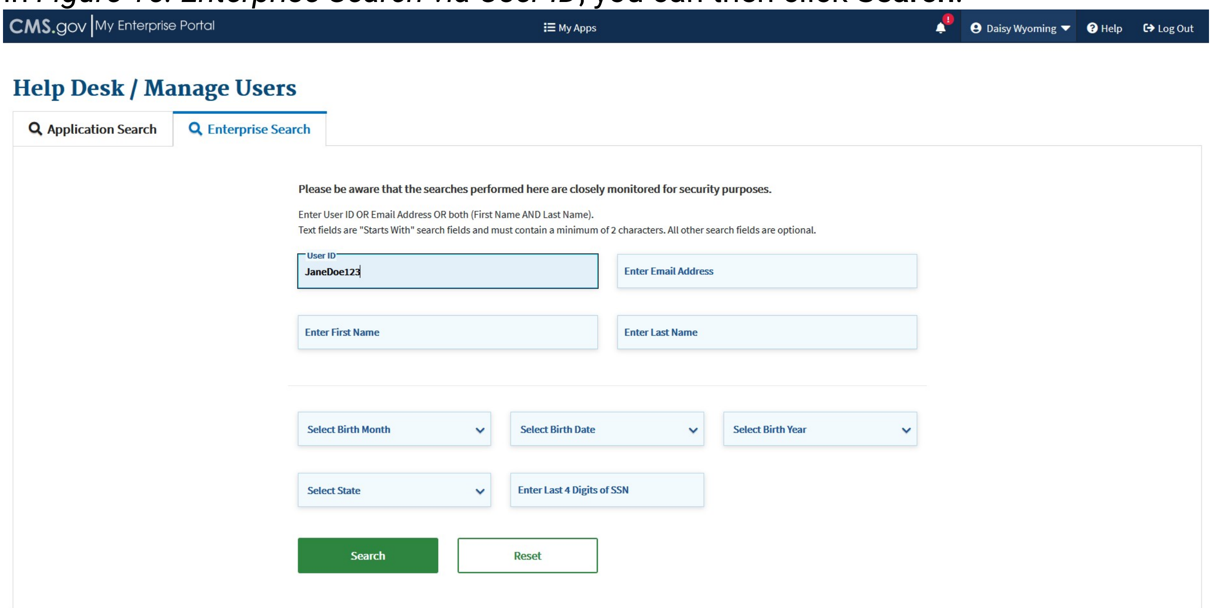

Figure 15: Enterprise Search via User ID

The search results are returned, as shown in *Figure 16: Enterprise Search Results from User ID*. Results can be sorted by User ID, First Name, Last Name, Email Address, State, and Status. Results can be filtered by User ID, First Name, Last Name, Email Address, and State. To refine the search criteria, click on the **Edit** button next to Search Criteria.

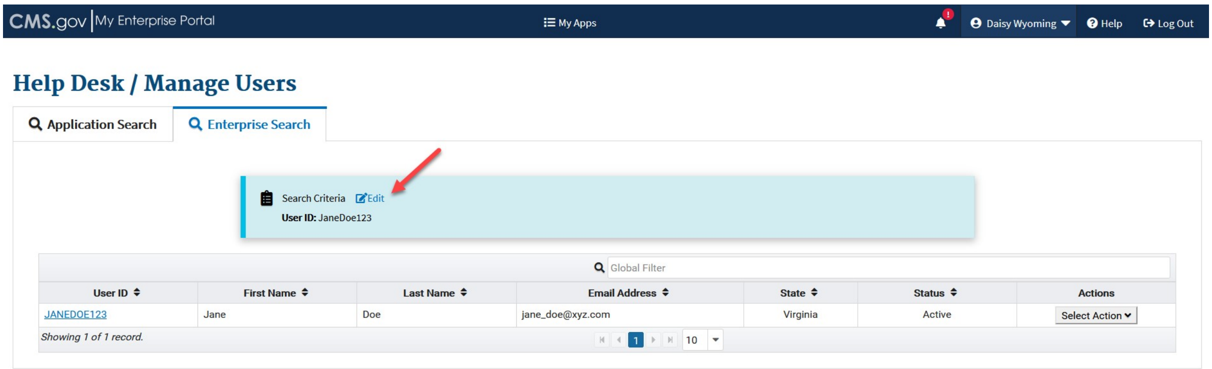

Figure 16: Enterprise Search Results from User ID

4.4. Performing Actions on Search Results

The functions available for use by a user with Help Desk privileges depend on the role of the Help Desk user and the current status of a target user. For instance, some Help Desk users are not allowed to update users' LOA and a target user can only be unlocked if they currently have the status of Locked Out. On the Search results page, a **Select Action** drop-down is available under the Actions column with the following options to select from:

- **Reset Password** – allows resetting a user's password either manually or via email.
- **View MFA Devices** – allows viewing the registered MFA devices associated with a user's account.
- **Update User Email Address** – allows updating a user's email address.
- **Update User Level of Assurance (LOA)** – allows manually raising a user's LOA.
- **Remove Role/Attribute** – allows removal of one or more of a user's role attributes or an entire role assigned to a user.
- **Unlock User Account** – allows unlocking of a user's account (only available if the user's account is currently in the Locked Out status).
- **Suspend User** – allows suspending of a user's account so that they will no longer be able to log in and use their account (only available if the user's account is currently NOT in the Suspended status). Formerly called "Disable".
- **Unsuspend User** - allows unsuspending of a user's account so that they will be able to log in and use their account (only available if the user's account is currently in the Suspended status). Formerly called "Enable".

The Status column may show one of the following listed values for a user depending on the cause.

Table 1: User Account Status

Status	Cause
Active	User can actively use the CMS Enterprise Portal.
Locked Out	User exceeded three login attempts. The user will be unable to log in again until their account has been unlocked.
Suspended	User account has been explicitly suspended. The user will be unable to log in

	again while they are in the Suspended state.
Password Expired	The password associated with the user account has expired. The user will be able to log in but, after successful log in, will be asked to reset their password.
Recovery	User's password was either reset by Help Desk (either manually or via email), or the user is using the self-service Forgot Password feature to reset the password. The user must complete the recovery process to get to the Active status.
Pending Activation	User account has not been provisioned yet. The user will be set to Active status and be able to log in once the provisioning process has been completed.
Staged	User account was created, but the activation flow has not been initiated or there is some administration action pending. The user will be set to Active status and be able to log in once the staging process has been completed.

5. Viewing User Details

This section outlines how users with Help Desk privileges can view the information associated with a user's account in CMS Enterprise Portal.

The following are the instructions on how to view the user details.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink under the **User ID** column, as shown in *Figure 17: Selecting User ID Hyperlink* to view the user details associated with a specific user.

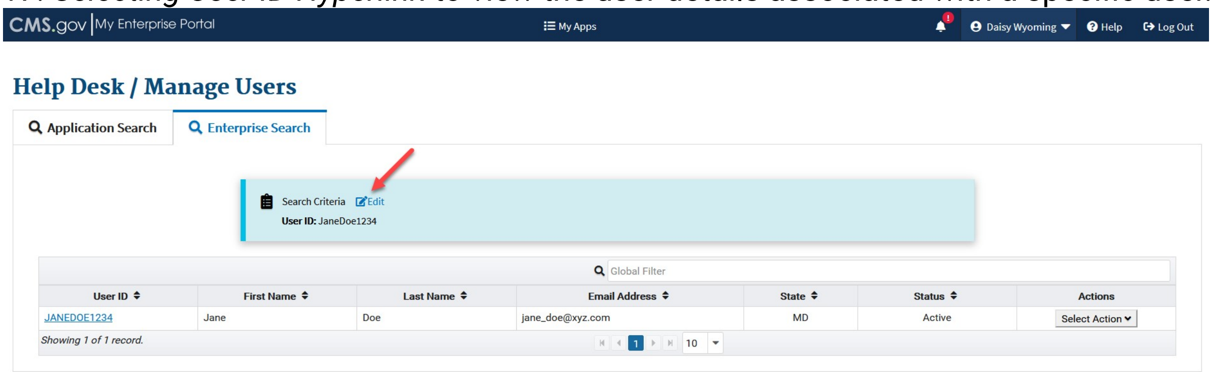

Figure 17: Selecting User ID Hyperlink

You are directed to the **User Details** page, as shown in *Figure 18: User Details*.

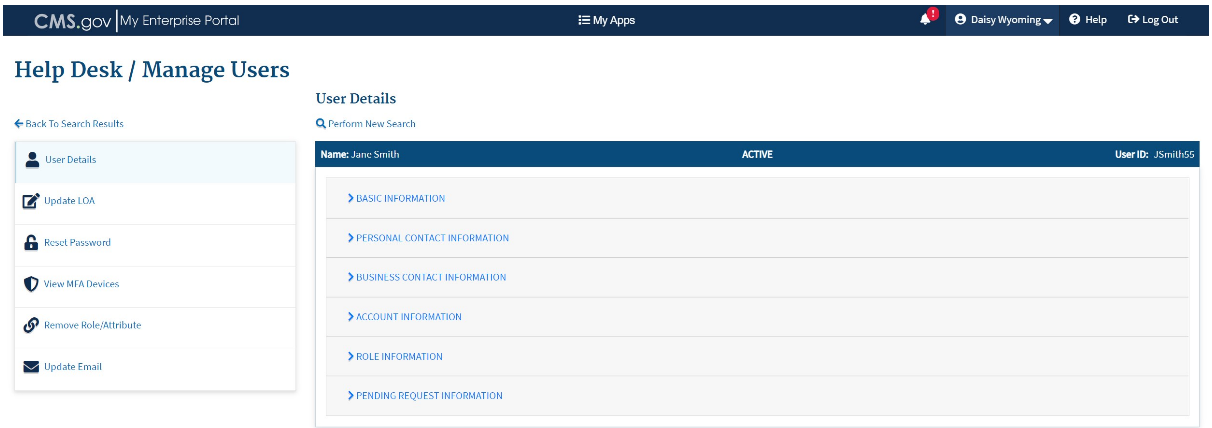

Figure 18: User Details

The following user information can be viewed on the **User Details** page.

Table 2: User Information on User Details Page

Section	Information
Basic Information	• First Name • Middle Name • Last Name

	• Suffix • Display Name • User ID • Date of Birth • Email Address • Last 4 Digits of SSN
Personal Contact Information (if the user has a U.S. Address)	• Home Address Line 1 • Home Address Line 2 • City • State • ZIP Code • ZIP+4 Code • Phone Number
Foreign Contact Information (if the user has a Foreign Address)	• Foreign Address Line 1 • Foreign Address Line 2 • City • State • ZIP/Postal Code • ZIP/Postal Code Extension • Province/Region/Territory • Country • Country Code • Phone Number
Business Contact Information	• Company Name • Address Line 1 • Address Line 2 • City • State/Territory • ZIP Code • ZIP+4 Code • Company Phone Number and Extension • Office Phone Number and Extension
Account Information	• User Status • Users Status Change Reason • Source of Account Creation • Level of Assurance (LOA) • LOA Change Reason • LOA Change Justification • Review Reference ID • Reset Password Justification • Last Profile Update Date • Last Login Date
Role Information	This section displays roles for the selected user. The role details will only be shown for the applications for which the Help Desk user has a Help Desk role.
Pending Request Information	This section displays pending role requests. The Help Desk user is allowed cancelation of pending role requests for target users only for the applications for which the Help Desk user has an Approver role.

To return to the search results from the **User Details** page, click **Back to Search Results** available above the left navigation pane.

6. Canceling Pending Role Request

This section describes how users with Approver privileges (i.e., Approver Users and some Help Desk users) can cancel a pending role request which has not yet been rejected, approved, or expired.

When a user submits a request for multiple contracts or states, CMS Enterprise Portal issues multiple request numbers (i.e., they become separate requests). The role management component in CMS Enterprise Portal supports cancelling individual subtasks. The cancellation happens at the request level.

The following are the instructions on how to cancel a pending role request without attributes.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 19: Selecting Pending Request Information*.

6. On the **User Details** page, click on the **Pending Request Information** header to expand that section, as shown in *Figure 19: Selecting Pending Request Information*.

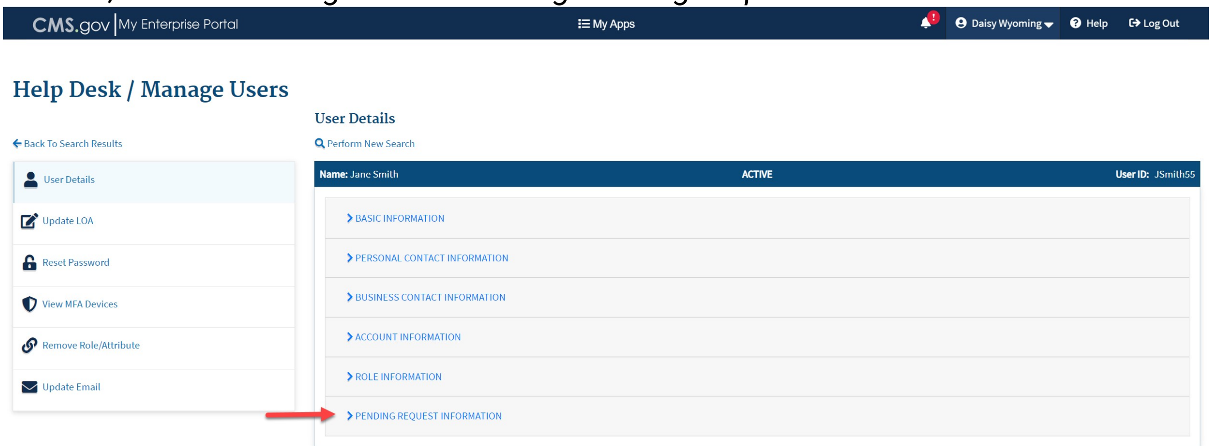

Figure 19: Selecting Pending Request Information

You will be able to review the details of any role requests that are currently pending, as shown in *Figure 20: Viewing Pending Role Request Information*.

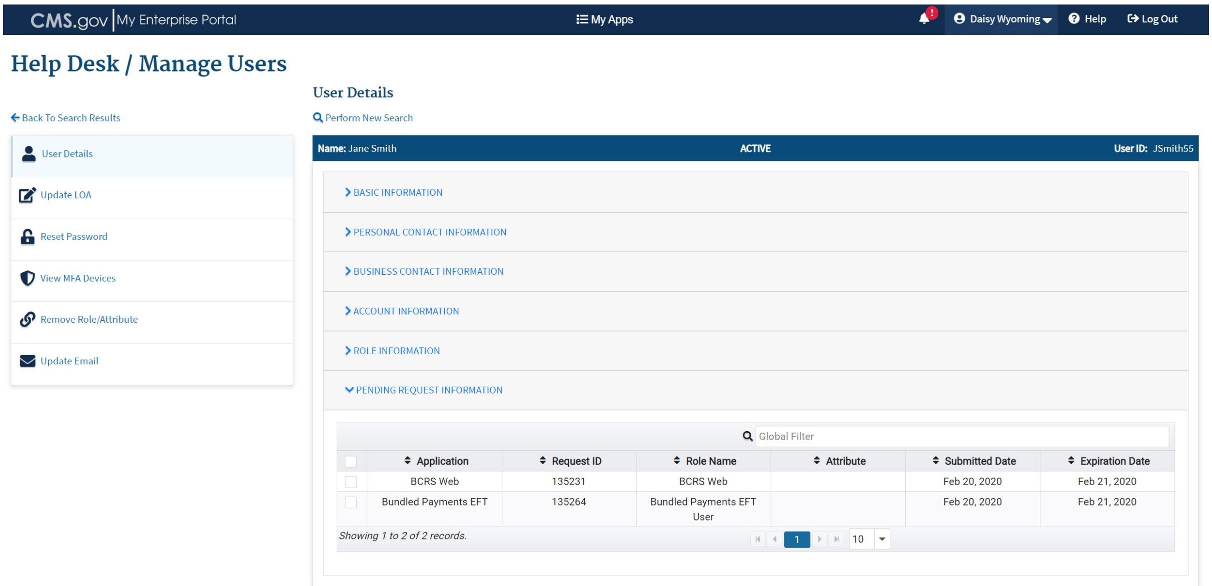

Figure 20: Viewing Pending Role Request Information

7. Select the role request you wish to cancel by clicking the checkbox next to the request, then click **Cancel Pending Request**, as shown in *Figure 21: Canceling Pending Request*.

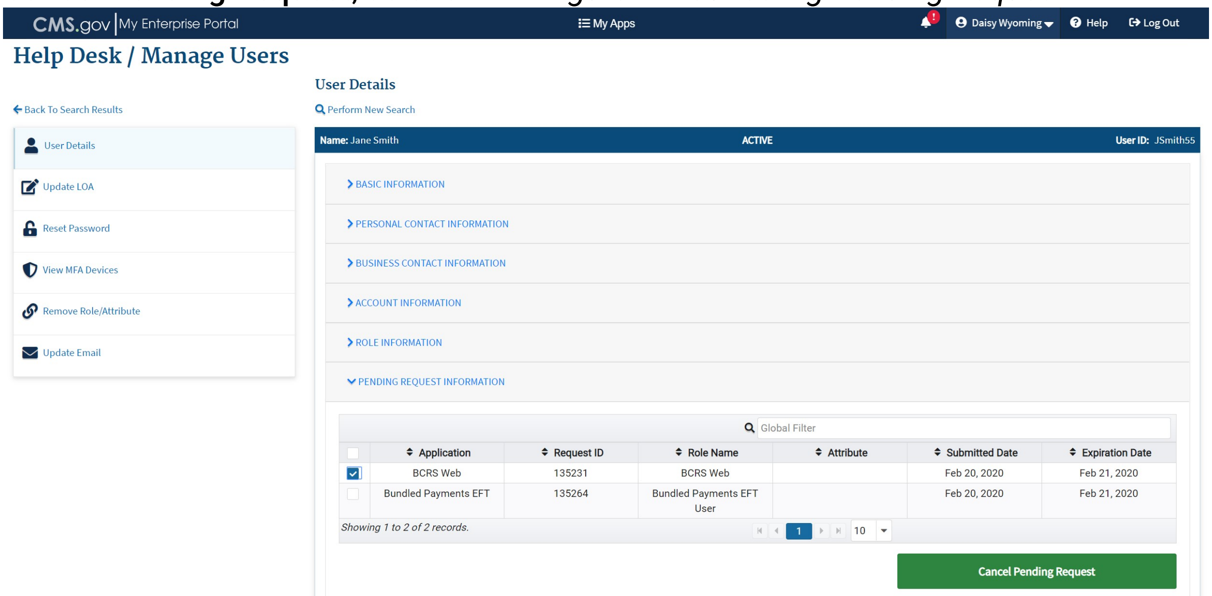

Figure 21: Canceling Pending Request

You will be prompted to enter a justification for canceling the pending request, as shown in *Figure 22: Entering Justification for Cancel Pending Request*.

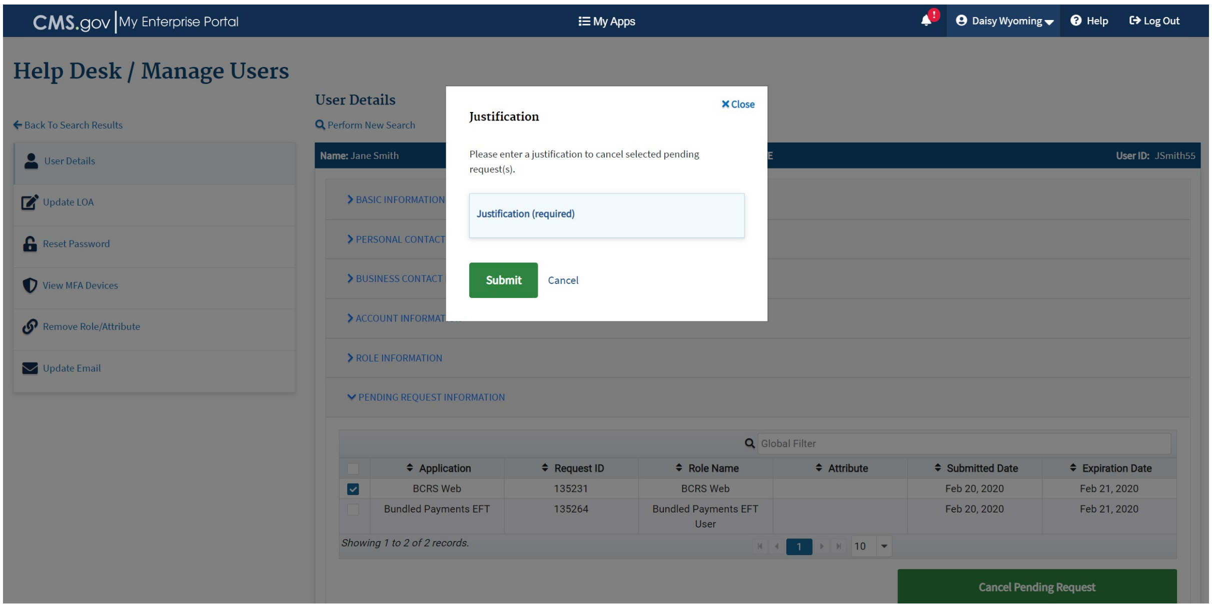

Figure 22: Entering Justification for Cancel Pending Request

8. Enter a justification in the provided field in the modal dialog box, and then click **Submit** to cancel the selected pending role request.

7. Updating User LOA

This section describes how Help Desk users can update a user's Level of Assurance (LOA) in CMS Enterprise Portal. Help Desk users have the ability to manually raise another user's LOA after determining their identity; however, they cannot lower the LOA of a user. Once LOA 3 is reached, no changes can be made to the LOA level or user details. Help Desk can only take the action to raise the LOA of an active user and cannot raise the user's LOA if the user's account is suspended.

The following are the instructions on how to update a user's LOA.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.

6. You are directed to the **User Details** page, as shown in *Figure 23: Selecting Update LOA*.

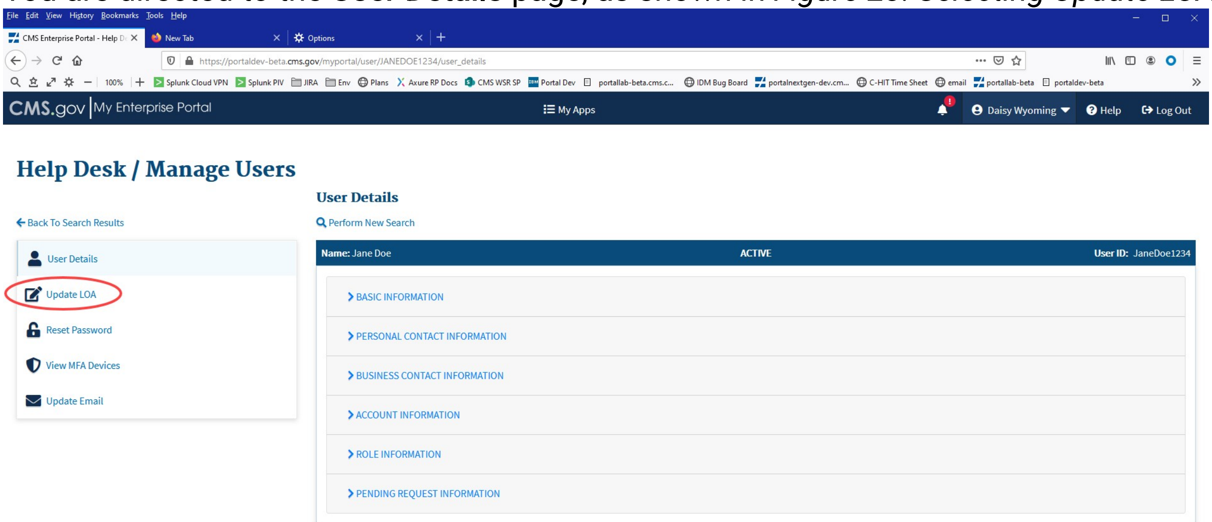

Figure 23: Selecting Update LOA

7. Click **Update LOA** in the left pane, as shown in *Figure 23: Selecting Update LOA*.

   The **Update LOA** page displays, as shown in *Figure 24: Update LOA*.

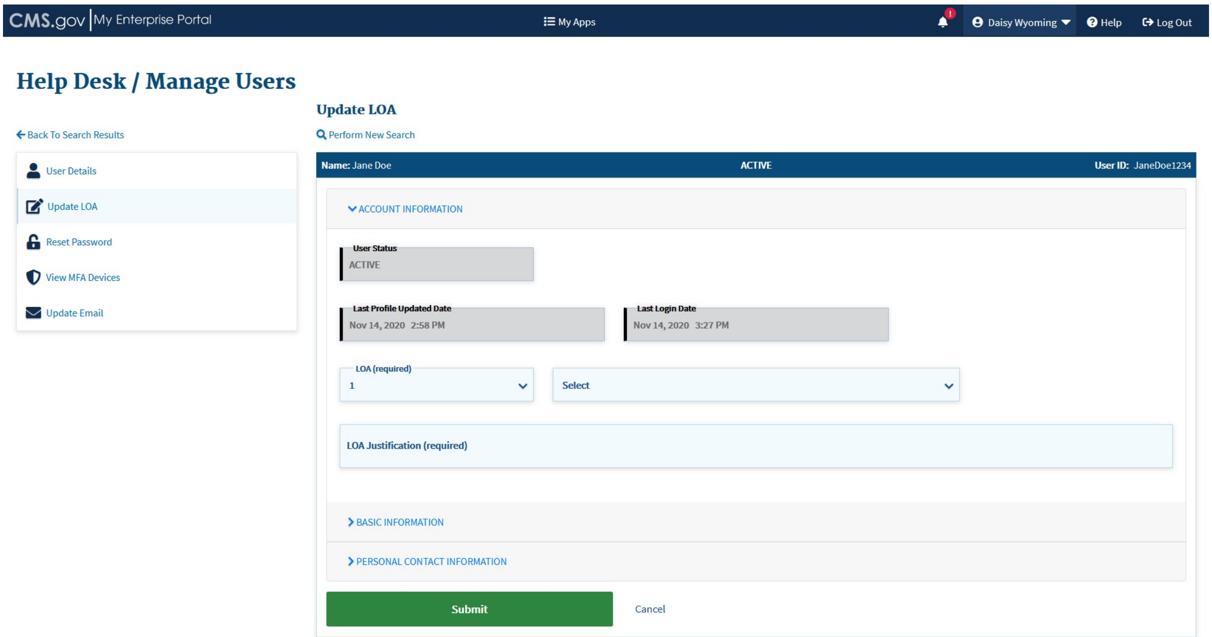

Figure 24: Update LOA

8. From the **LOA** drop-down, select the appropriate LOA (2-3) to update the user to, as shown in *Figure 25: Selecting the LOA for the User*.

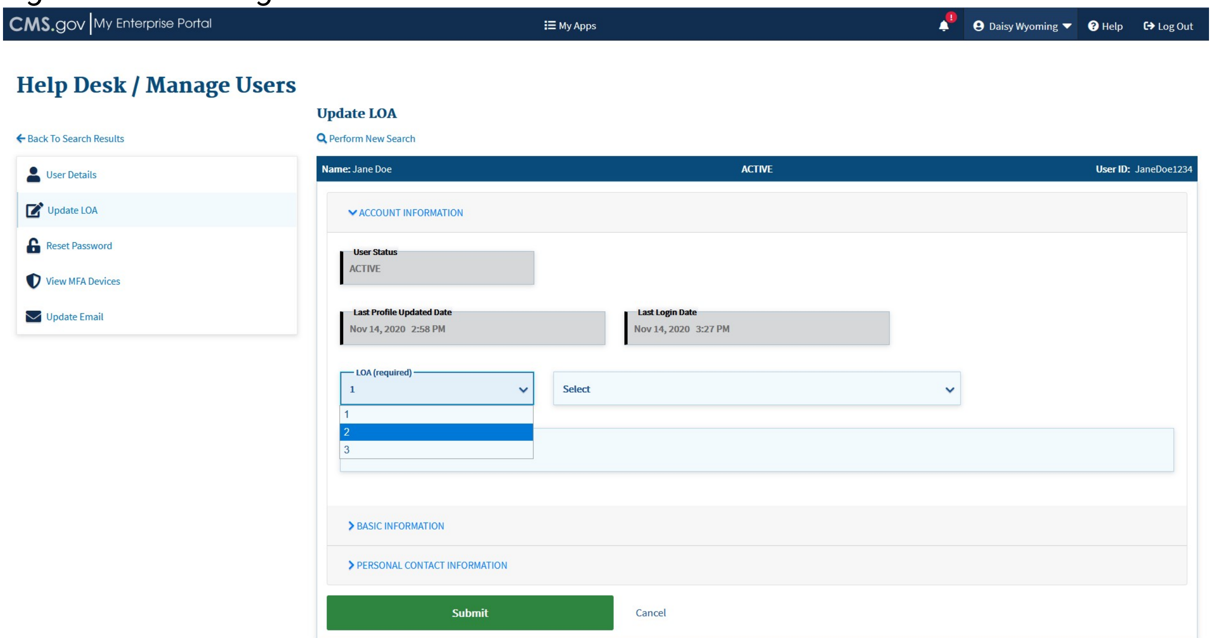

Figure 25: Selecting the LOA for the User

9. From the **LOA Change Reason** drop-down, select the reason for LOA update, as shown in *Figure 26: Selecting LOA Change Reason*.

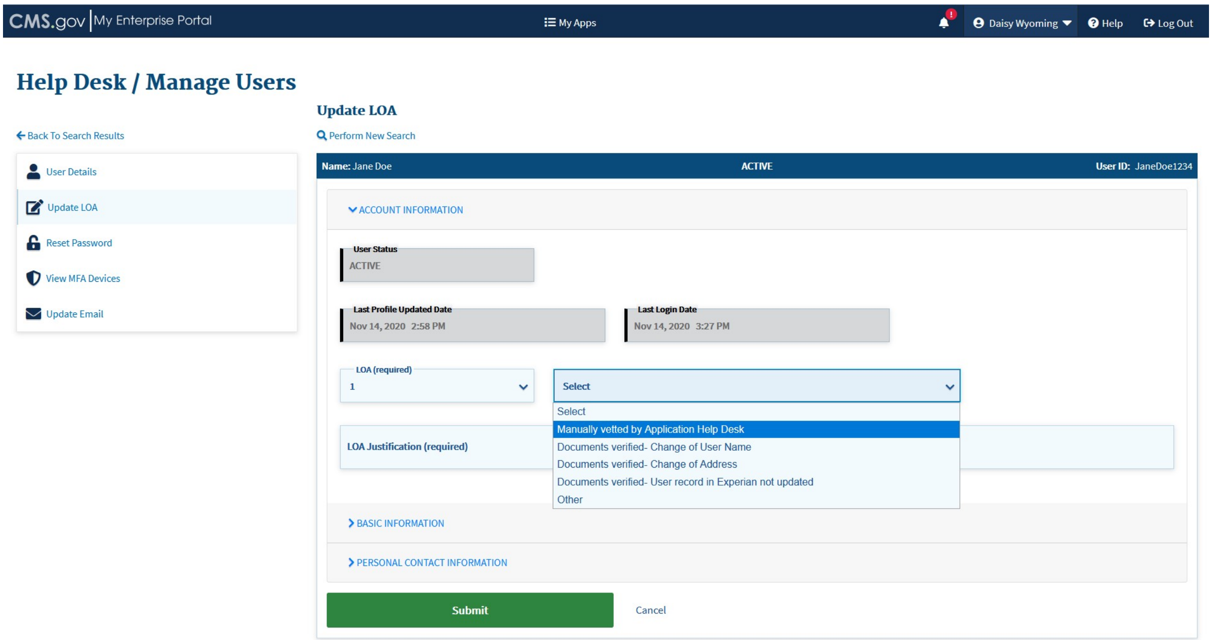

Figure 26: Selecting LOA Change Reason

10. Enter a justification for the LOA update, as shown in *Figure 27: Entering LOA Change Justification*.

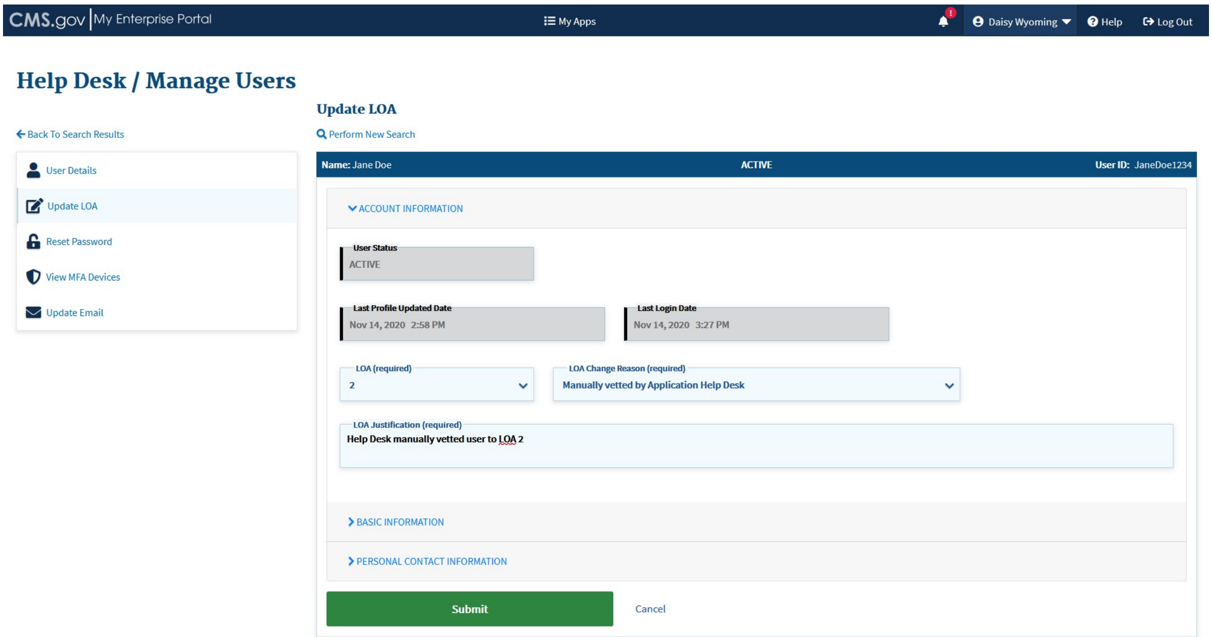

Figure 27: Entering LOA Change Justification

11. Click **Submit**.

    You will be prompted to confirm if you want to update LOA, as shown in *Figure 28: LOA Update Confirmation*.

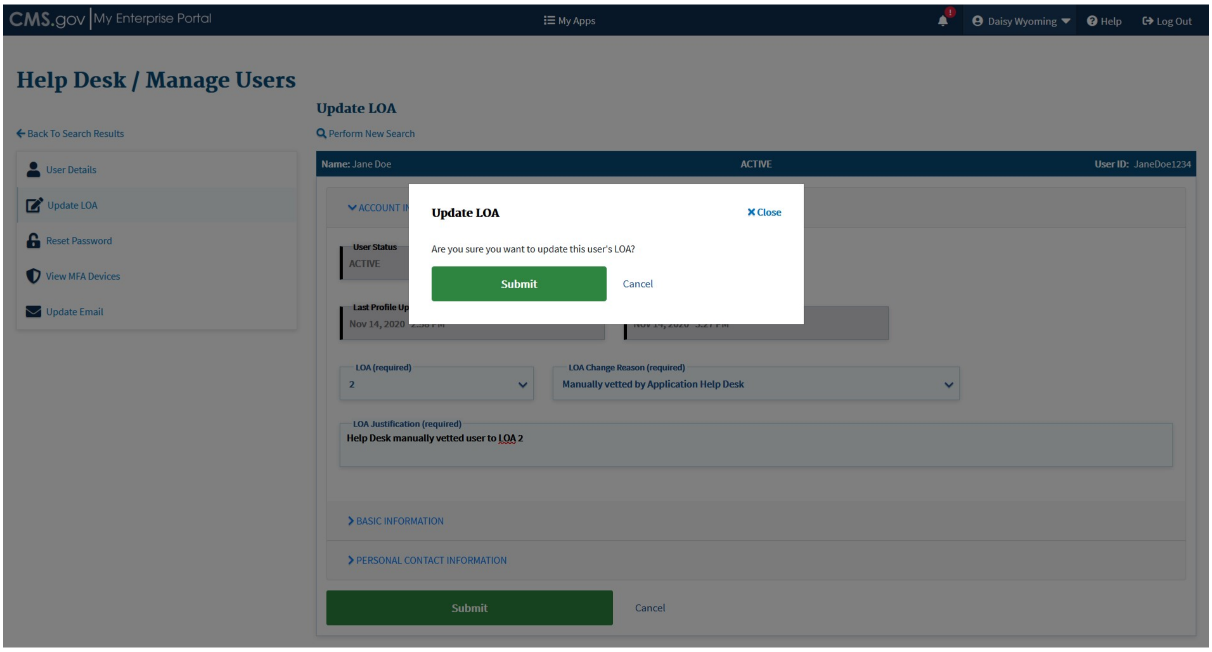

Figure 28: LOA Update Confirmation

12. In the Update LOA modal dialog box, click **Submit** to approve the LOA update. Click **Cancel** to cancel the change and return to the **Update LOA** page.

8. Resetting Password

This section describes how a Help Desk user can reset a user's password in CMS Enterprise Portal.

Help Desk users with the password reset capability can assist users with a password reset in two ways:

- **Via Email:** A link is emailed to users which allows them to reset their password. This is the same email that is sent when the user uses the self-service "Forgot Password" process.
- **Manually:** Help Desk generates a temporary password and shares the password with the user over the phone. The end user will use the temporary password to login to the system, and upon login, the end user will be required to reset their password (using the temporary password).

8.1. Resetting Password via Email

The following are the instructions on how to reset a user's password via email.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 29: Selecting Reset Password*.

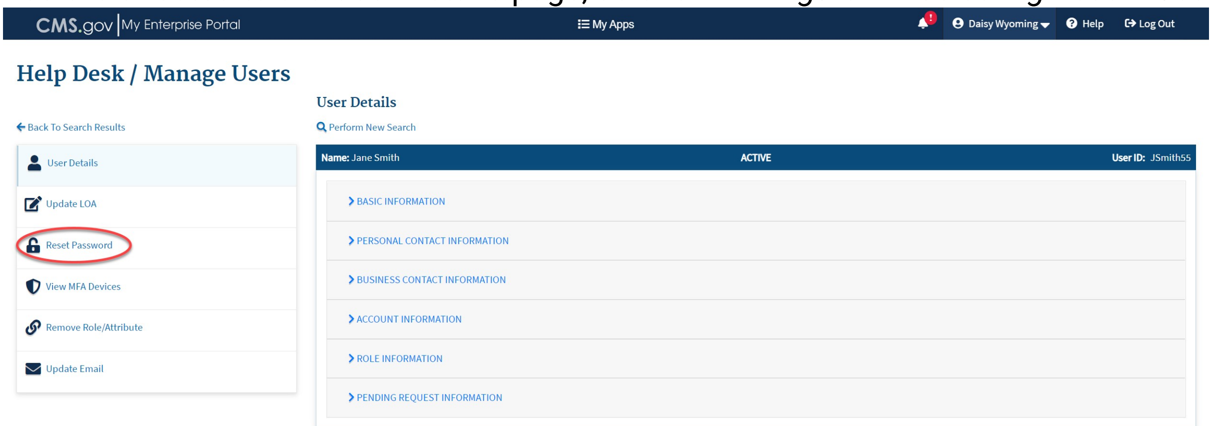

Figure 29: Selecting Reset Password

6. Click **Reset Password** in the left pane, as shown in *Figure 29: Selecting Reset Password*.
   The **Reset Password** page displays, as shown in *Figure 30: Reset Password*.

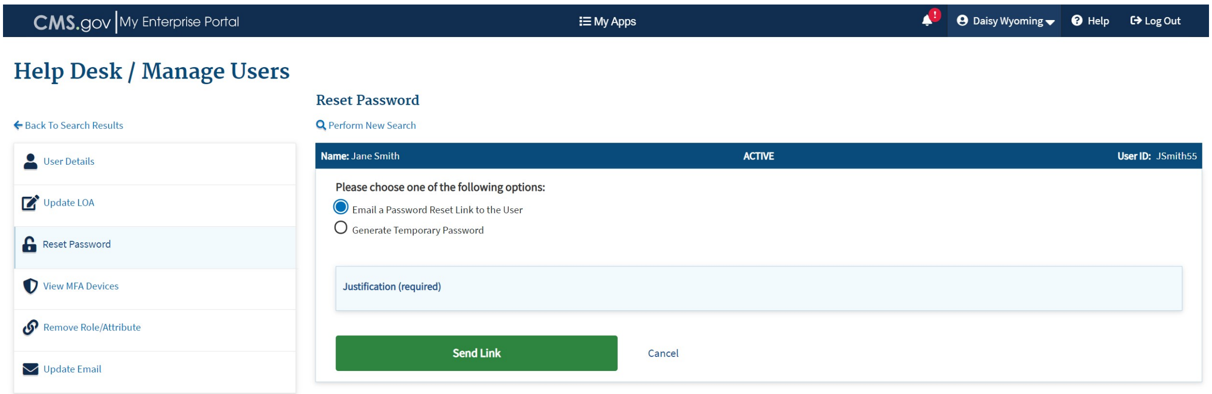

Figure 30: Reset Password

7. Make sure the first radio button **E-mail a Password Reset Link to the User** is selected.

8. The user who is resetting the password is responsible for authenticating the target user over the phone prior to sending the link for password reset. Enter a justification in the provided field, as shown in *Figure 31: Entering Justification for Password Reset via Email*.

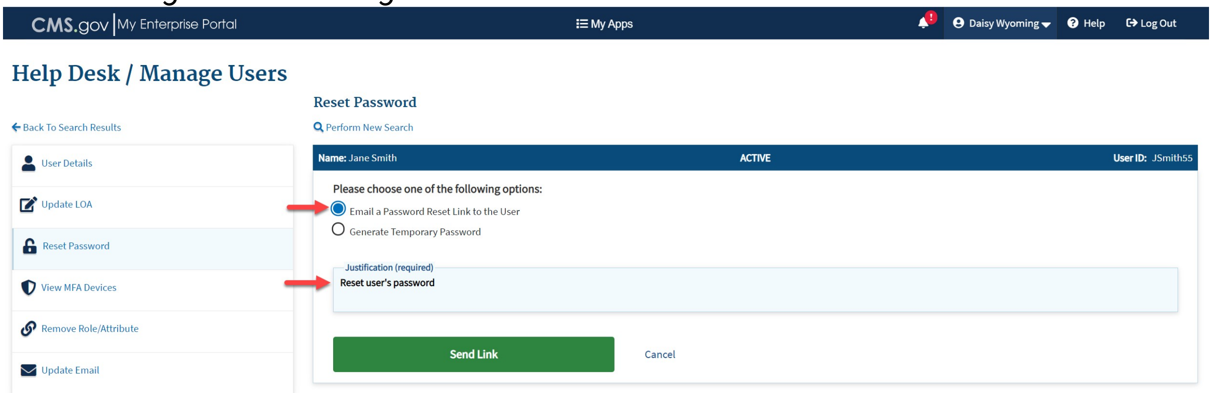

Figure 31: Entering Justification for Password Reset via Email

9. Click **Send Link**.

   You will see a confirmation that the password reset link has been sent to the user's registered email address.

   The user will receive a system generated email with a link to reset their password. The user must click the link in the email to reset their password. The user will be required to verify their identity using one of their registered MFA devices, answer their Security Question, followed by a prompt to create a new password.

8.2. Resetting Password Manually

The following are the instructions on how to reset a user's password manually.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search or Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 29: Selecting Reset Password*

6. Click **Reset Password** in the left pane, as shown in *Figure 29: Selecting Reset Password*.
   The **Reset Password** page displays, as shown in *Figure 30: Reset Password*.

7. Click the **Generate Temporary Password** radio button, as shown in *Figure 32: Entering Justification for Manual Password Reset*.

8. The user who is resetting the password is responsible for authenticating the target user over the phone prior to generating a temporary password. Enter a justification in the provided field, as shown in *Figure 32: Entering Justification for Manual Password Reset*.

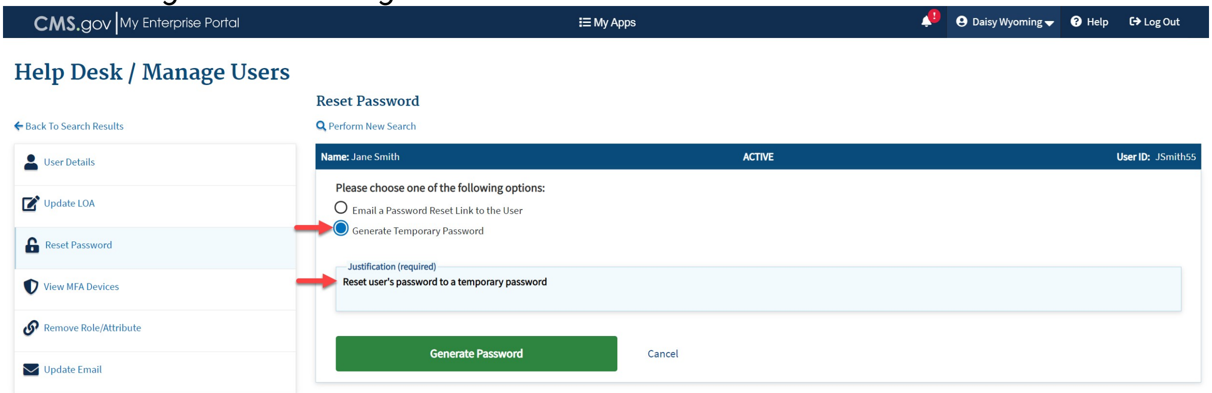

Figure 32: Entering Justification for Manual Password Reset

9. Click **Generate Password**.
   A system generated password displays on the **Reset Password** page, as shown in *Figure 33: Temporary Password*.

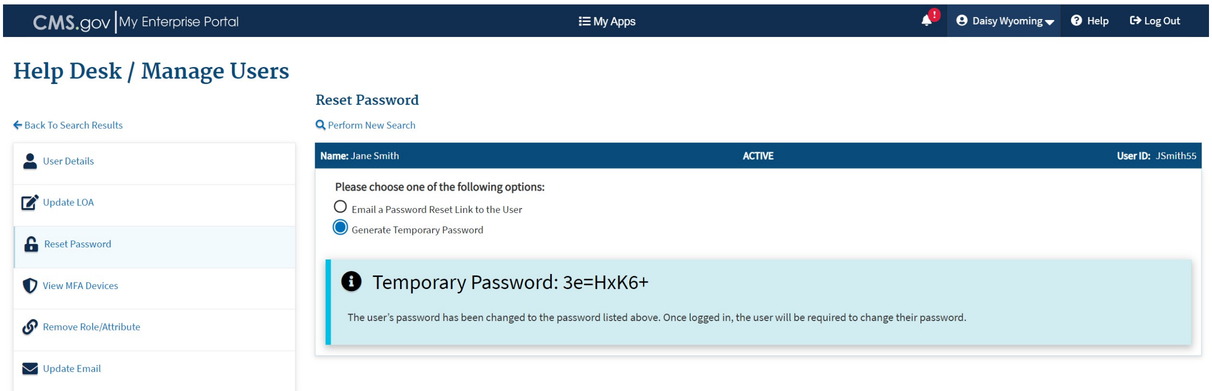

Figure 33: Temporary Password

Upon their next successful login with the temporary password, the user will be required to reset their password.

9. Viewing List of MFA Devices

This section describes how Help Desk can view the MFA devices associated with another user's account in CMS Enterprise Portal.

In CMS Enterprise Portal, email is automatically setup as the default MFA method (MFA device) once a user successfully logs in for the first time. The roles a user has will determine if they need to login using an MFA (in addition to their user ID and password). End users can add other MFA devices to their account at any time from the **My Profile** page.

Help Desk users can only view MFA devices; they cannot add or remove MFA devices to or from the user's profile.

The following are the instructions on how to view a user's registered MFA devices.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 34: Selecting View MFA Devices*.

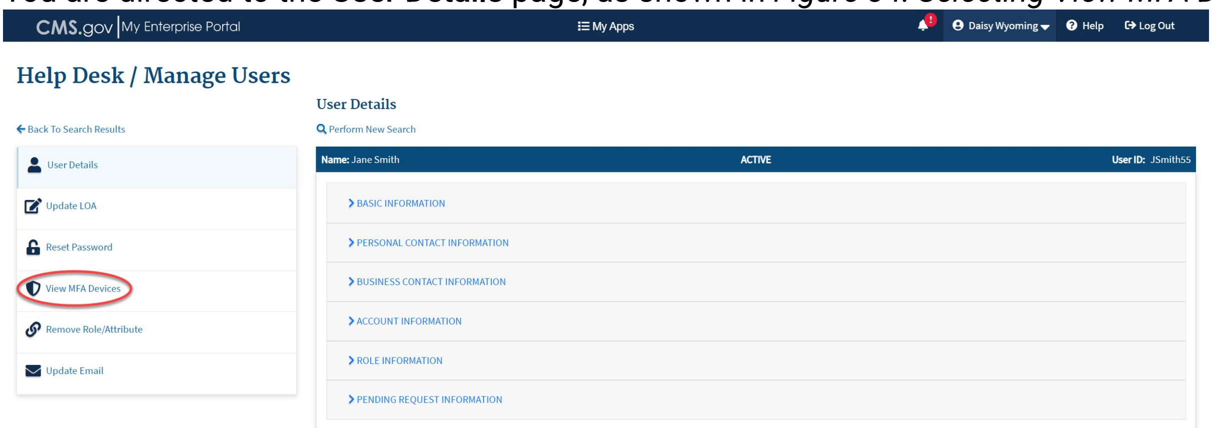

Figure 34: Selecting View MFA Devices

6. Click **View MFA Devices** in the left pane, as shown in *Figure 34: Selecting View MFA Devices*.
   You are directed to the **View MFA Devices** page, as shown in *Figure 35: Viewing MFA Devices Associated with a User's Account*, where you can see the devices associated with a user's account.

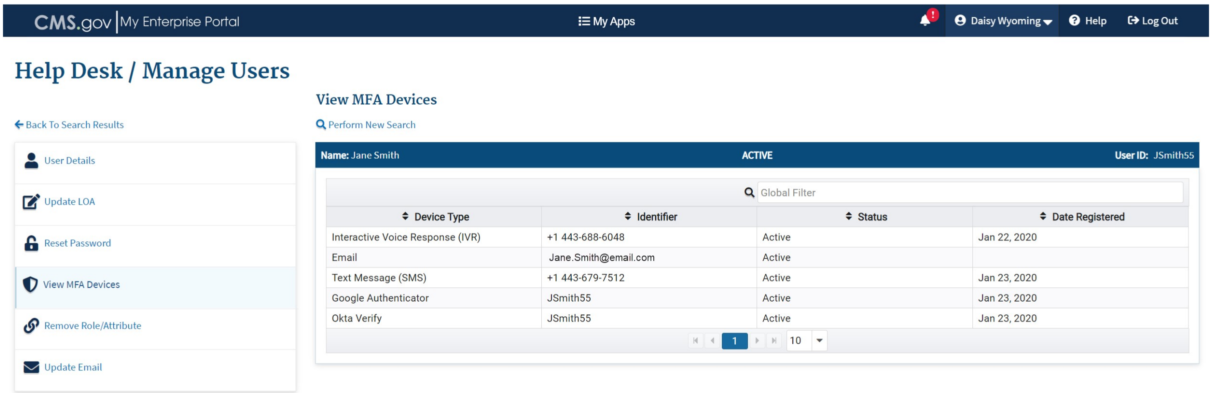

Figure 35: Viewing MFA Devices Associated with a User's Account

10. Removing Roles/Attributes

This section describes how users with Help Desk privileges can remove roles/attributes from a user's profile in CMS Enterprise Portal.

The following are the instructions on how to remove a user's roles/attributes.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 36: Selecting Remove Role/Attribute*.

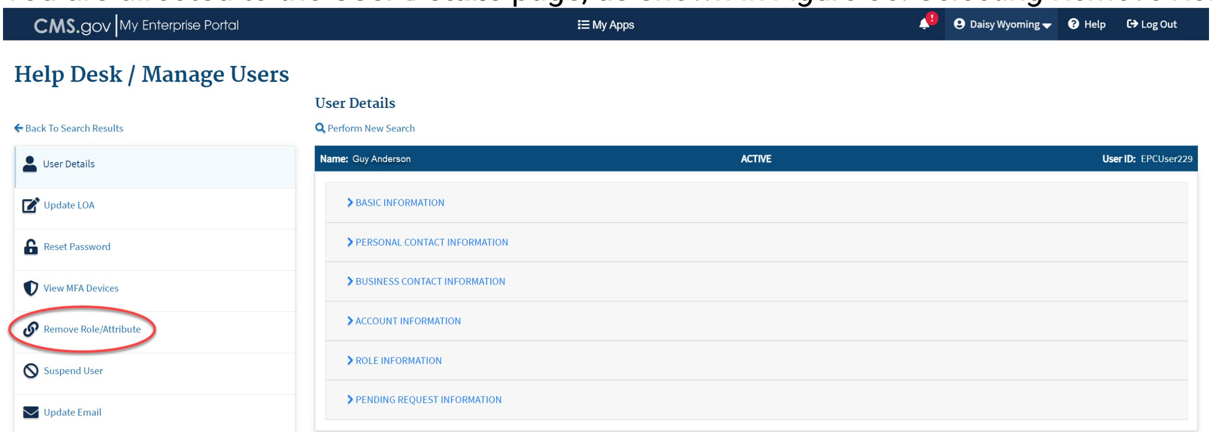

Figure 36: Selecting Remove Role/Attribute

6. Click **Remove Role/Attribute** in the left pane, as shown in *Figure 36: Selecting Remove Role/Attribute*.
   You are directed to the **Remove Role/Attribute** page, as shown in *Figure 37: Remove Role/Attribute*.

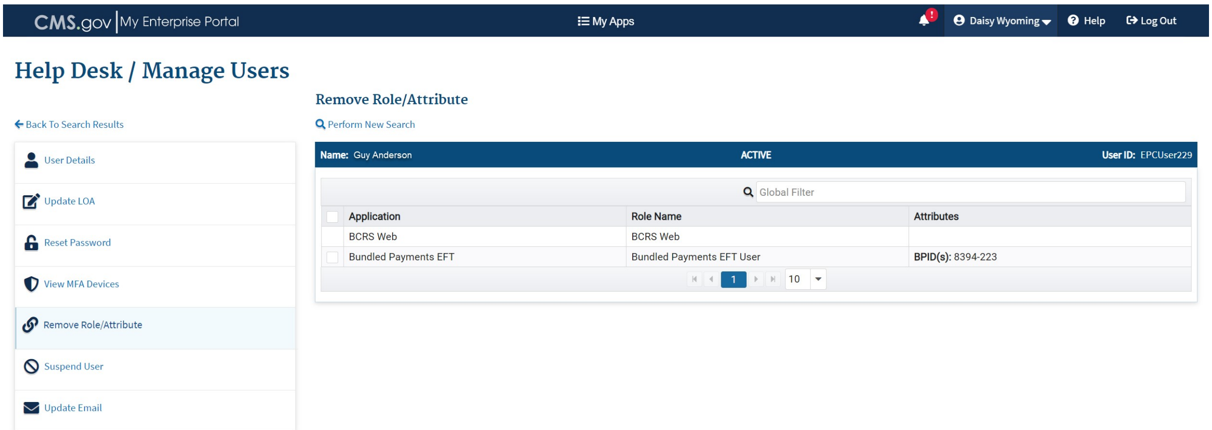

Figure 37: Remove Role/Attribute

7. Select the role/attribute you wish to remove from the user's profile by clicking the checkbox next to the application and then click **Remove**, as shown in *Figure 38: Selecting Role/Attribute for Removal*.

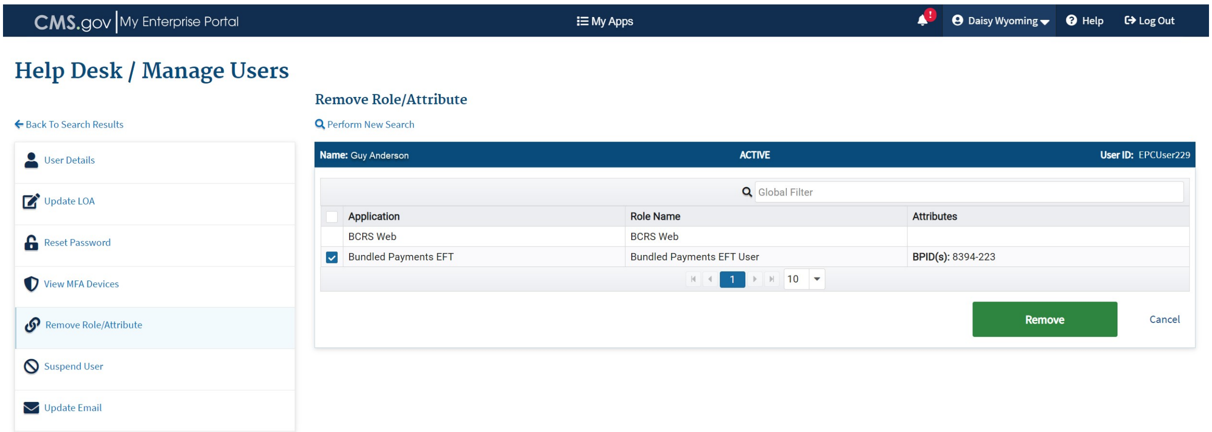

Figure 38: Selecting Role/Attribute for Removal

You will be prompted to enter a justification for role/attribute removal, as shown in *Figure 39: Entering Justification for Remove Role/Attribute*.

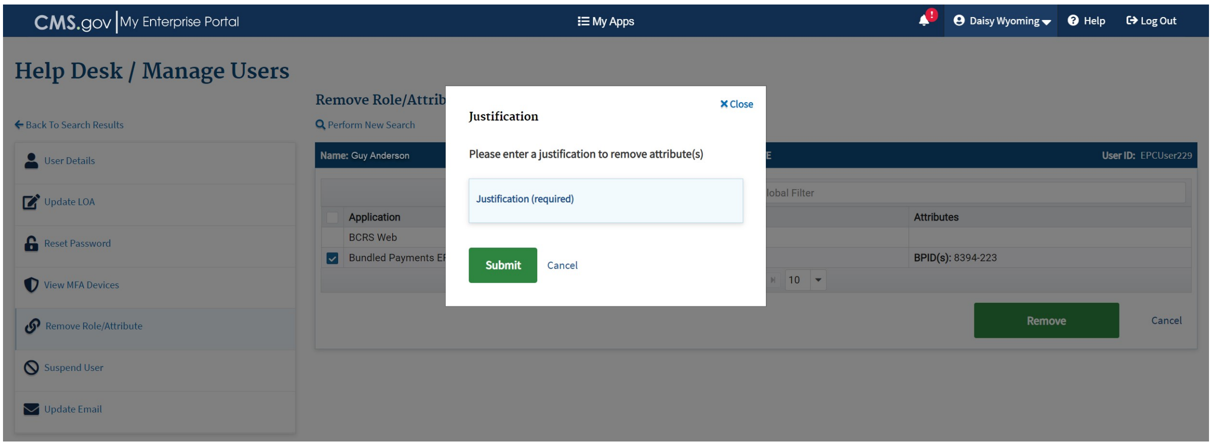

Figure 39: Entering Justification for Remove Role/Attribute

8. Provide a justification in the modal dialog box, and then click **Submit** to confirm the role/attribute removal. Or click **Cancel** to cancel the role/attribute removal process.

10.1. Removing Roles/Attributes for Multiple Users

Removal of role/attribute for multiple users is only available from the application search results page (upon performing an application search) and role is set as part of the search criteria. If users are returned in the search results, then they will include role/attribute information.

The following are the instructions on how to remove roles/attributes for multiple users.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in the *Performing Application Search* section to complete a valid user search. Ensure that role is specified in the search criteria.

5. On the results page, click **Remove Multiple Role/Attributes**, as shown in *Figure 40: Remove Multiple Roles/Attributes*.

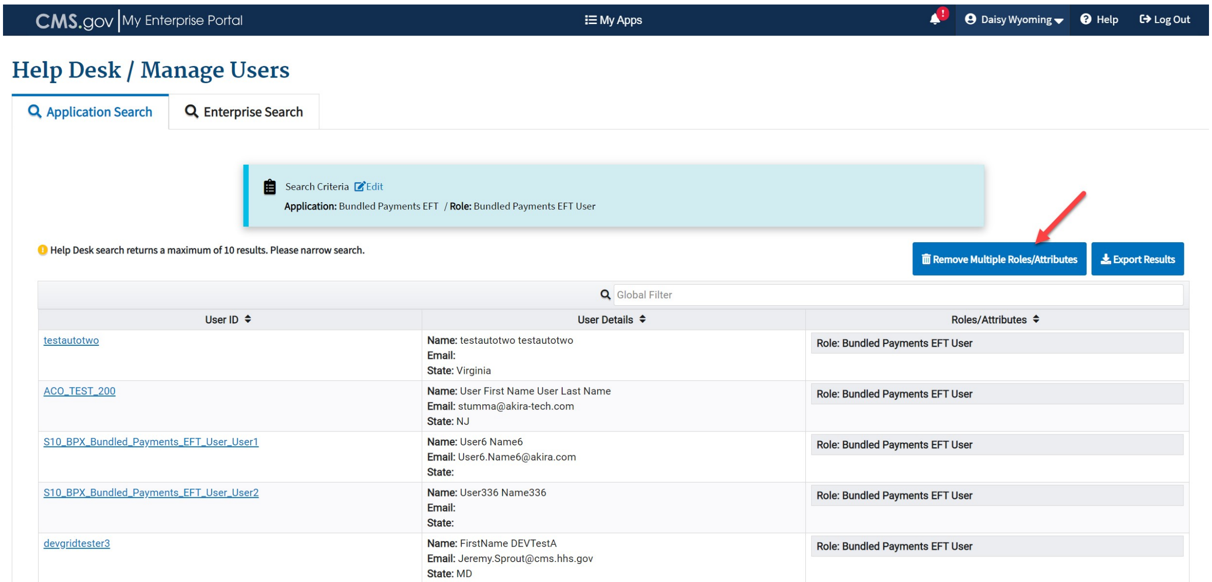

Figure 40: Remove Multiple Roles/Attributes

6. Click the checkbox for each user for which you want to remove the role or click the **Select All** checkbox to select all users, as shown in *Figure 41: Selecting Users for Roles/Attributes Removal*.

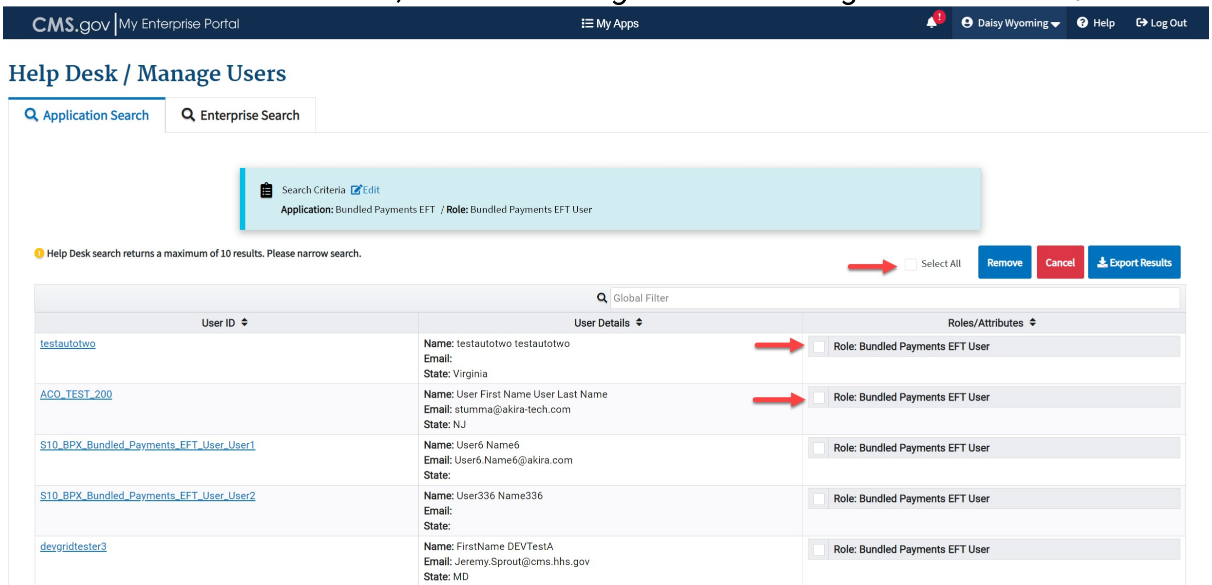

Figure 41: Selecting Users for Roles/Attributes Removal

7. Click **Remove** to proceed with the multiple roles/attributes removal or click **Cancel** to cancel the roles/attributes removal process.

   You will be prompted to enter a justification for roles/attributes removal, as shown in *Figure 42: Entering Justification for Remove Multiple Role/Attributes*.

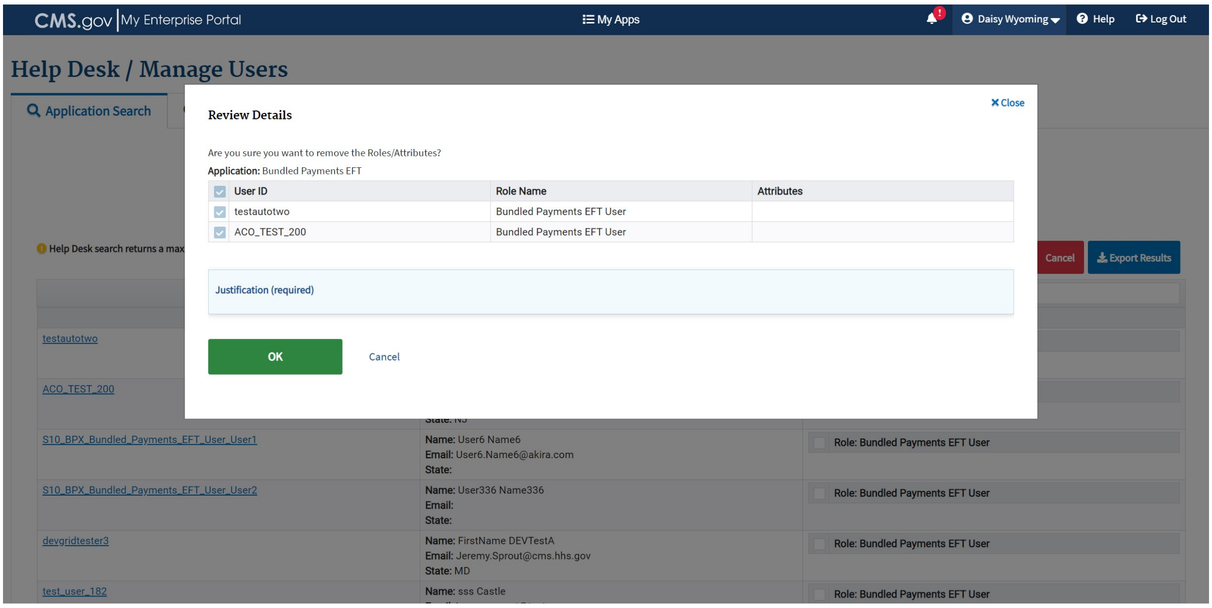

Figure 42: Entering Justification for Remove Multiple Role/Attributes

8. Provide a justification in the modal dialog box, and then click **OK** to confirm the roles/attributes removal. Or click **Cancel** to cancel the roles/attributes removal process.

11. Suspending User

This section describes how users with Help Desk privileges can suspend an active user account in CMS Enterprise Portal. End users in CMS Enterprise Portal are suspended when they violate the system's user agreement. Examples of user agreement violations include users sharing their account with another individual, using screen scraping software, and cases where the user's identity has been stolen and their account may be accessed fraudulently. In such cases, the users' Approver or the Business Owner of the application will request that the user's account be suspended.

The following are the instructions on how to suspend a user account.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 43: Selecting Suspend User*.

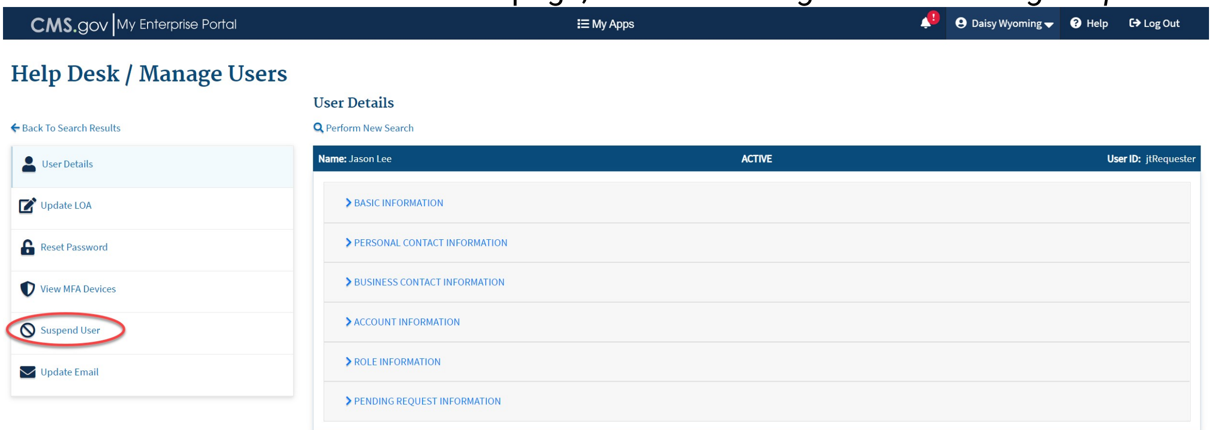

Figure 43: Selecting Suspend User

6. Click **Suspend User** in the left pane, as shown in *Figure 43: Selecting Suspend User*.
   You are directed to the **Suspend User** page, as shown in *Figure 44: Suspend User*.

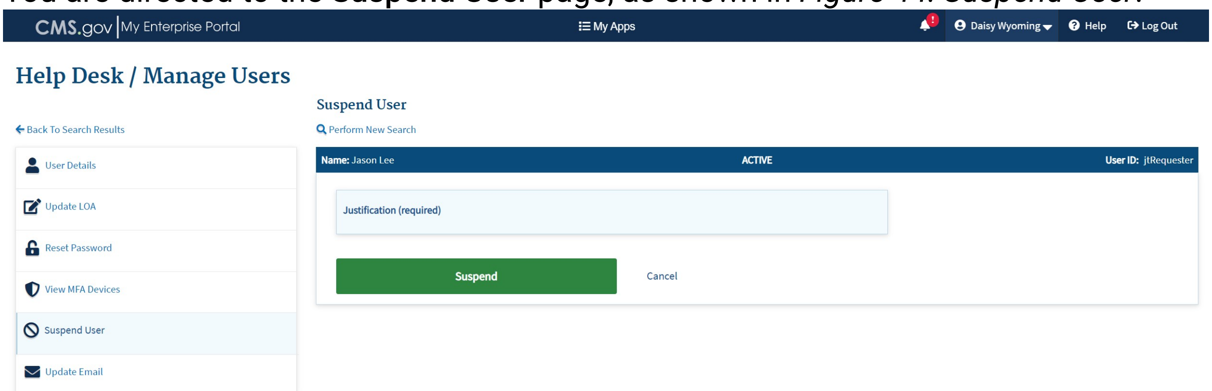

Figure 44: Suspend User

7. On the **Suspend User** page, enter a justification for suspending the user, as shown in *Figure 45:*

*Entering Justification for Suspend Account, and then click **Suspend**.*

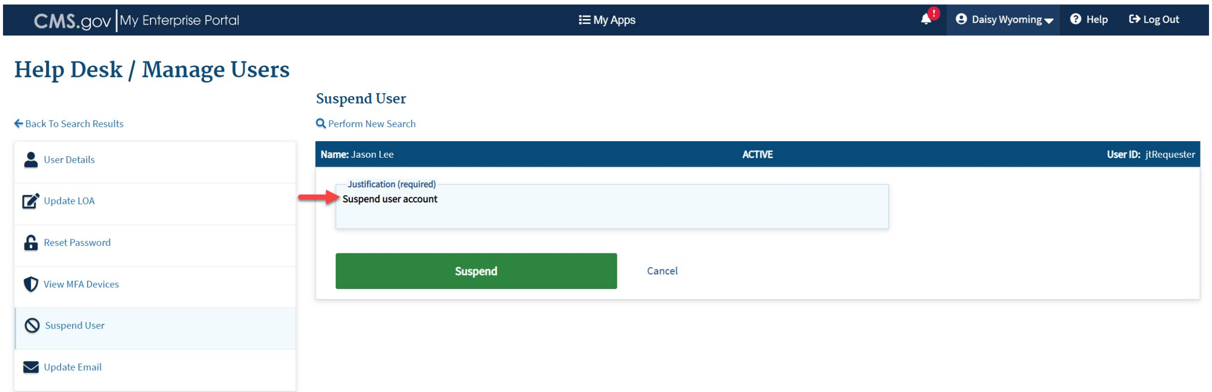

Figure 45: Entering Justification for Suspend Account

You will be prompted to confirm if you want to suspend the user's account, as shown in *Figure 46: Suspend Account Confirmation*.

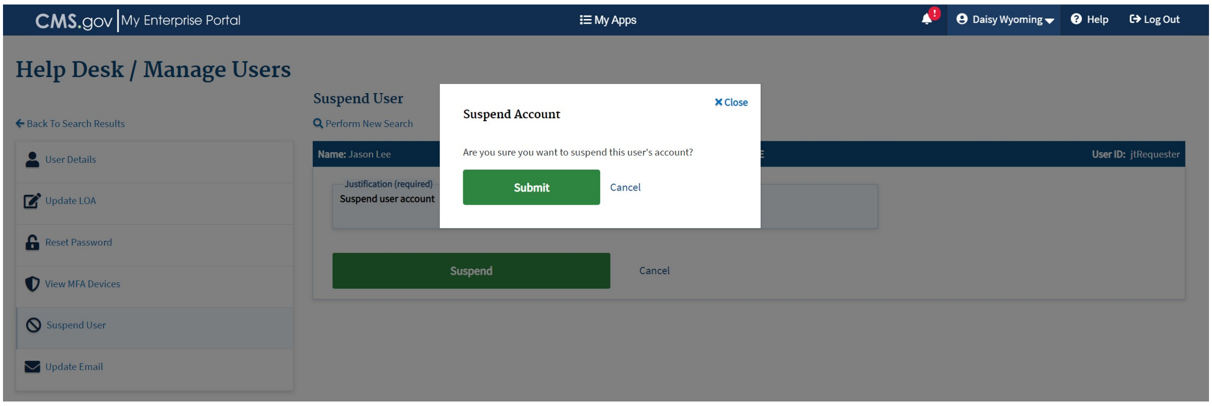

Figure 46: Suspend Account Confirmation

8. In the Suspend Account modal dialog box, click **Submit** to approve the user's suspension. Or click **Cancel** to cancel the update.

At this point, the suspended user will no longer be able to log in and use the CMS Enterprise Portal.

12. Unsuspending User

This section outlines how Help Desk users can unsuspend a user account that is currently suspended in CMS Enterprise Portal. Only Tier 2 Help Desk users have the ability to unsuspend a user account.

The following are the instructions on how to unsuspend a user account.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile and then click the **Enterprise Search** tab.
   The **Enterprise Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 14: Help Desk/Manage Users – Enterprise Search*.

4. Follow the steps in the *Performing Enterprise Search* section to complete a valid user search.

5. On the results page, if the target user has a status of "Suspended", click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 47: Selecting Unsuspend User*.

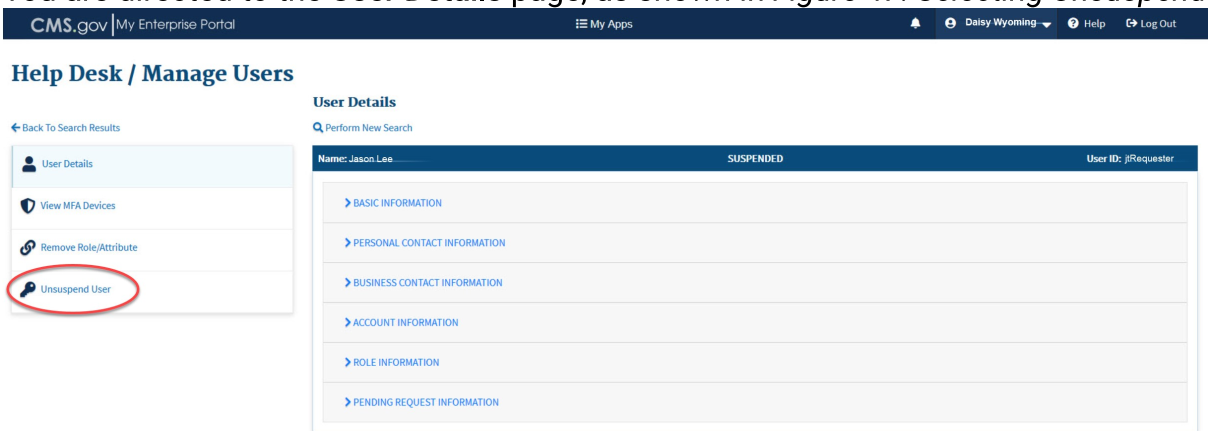

Figure 47: Selecting Unsuspend User

6. Click **Unsuspend User** in the left pane, as shown in *Figure 47: Selecting Unsuspend User*.
   You are directed to the **Unsuspend User** page, as shown in *Figure 48: Unsuspend User*.

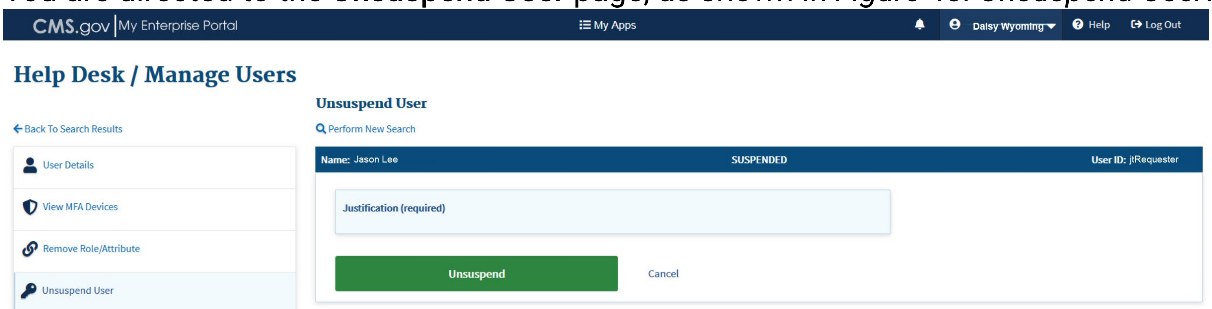

Figure 48: Unsuspend User

7. On the **Unsuspend User** page, enter a justification for unsuspending the user, as shown in *Figure 49: Entering Justification for Unsuspend Account*, and then click **Unsuspend**.

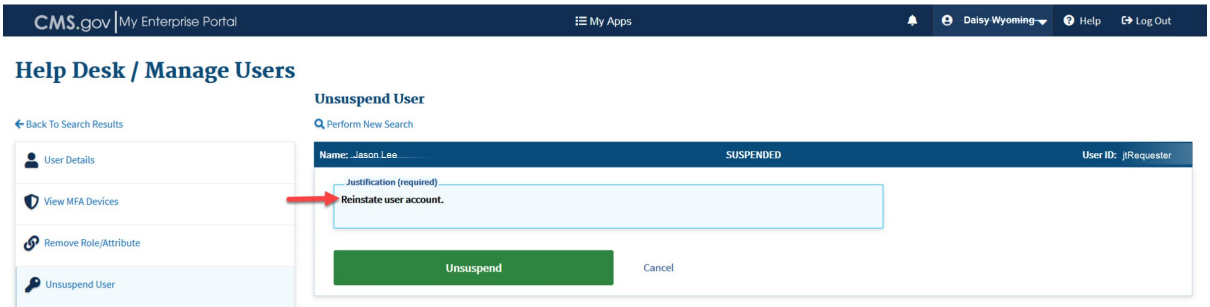

Figure 49: Entering Justification for Unsuspend Account

You will be prompted to confirm if you want to unsuspend the user's account, as shown in *Figure 50: Unsuspend Account Confirmation*.

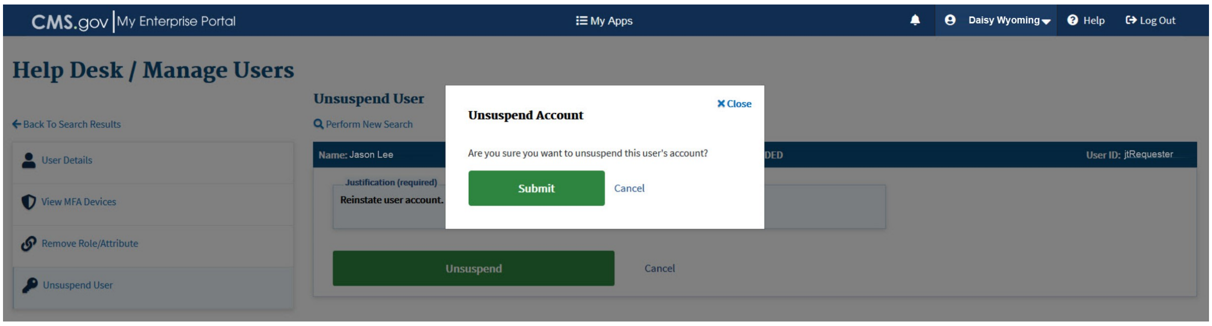

Figure 50: Unsuspend Account Confirmation

8. In the Unsuspend Account modal dialog box, click **Submit** to approve the user's unsuspension. Or click **Cancel** to cancel the update.

13. Unlocking User Account

This section describes how users with Help Desk privileges can unlock the account of a user whose account has been locked in CMS Enterprise Portal.

The following are the instructions on how to unlock the account of a user.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search* sections to complete a valid user search.
   On the results page, you will see the user's status as "Locked Out", as shown in *Figure 51: User Status - Locked Out*.

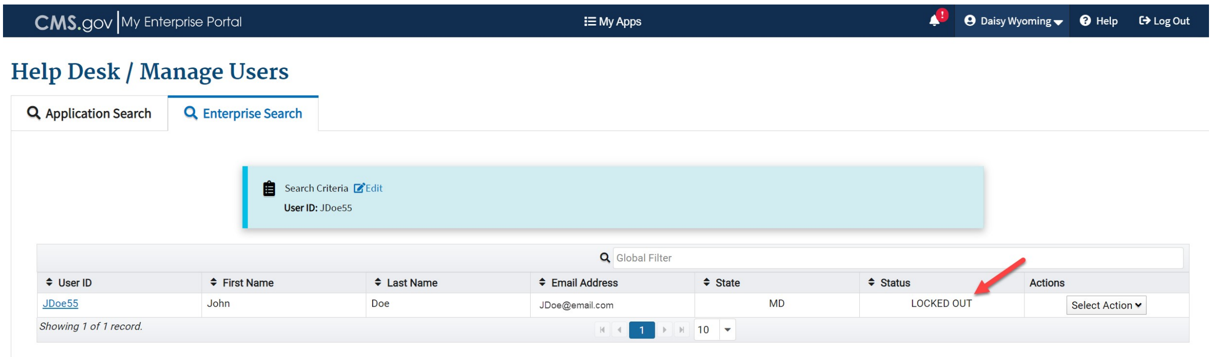

Figure 51: User Status - Locked Out

5. If the target user has a status of "Locked Out", then click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 52: Selecting Unlock Account*.

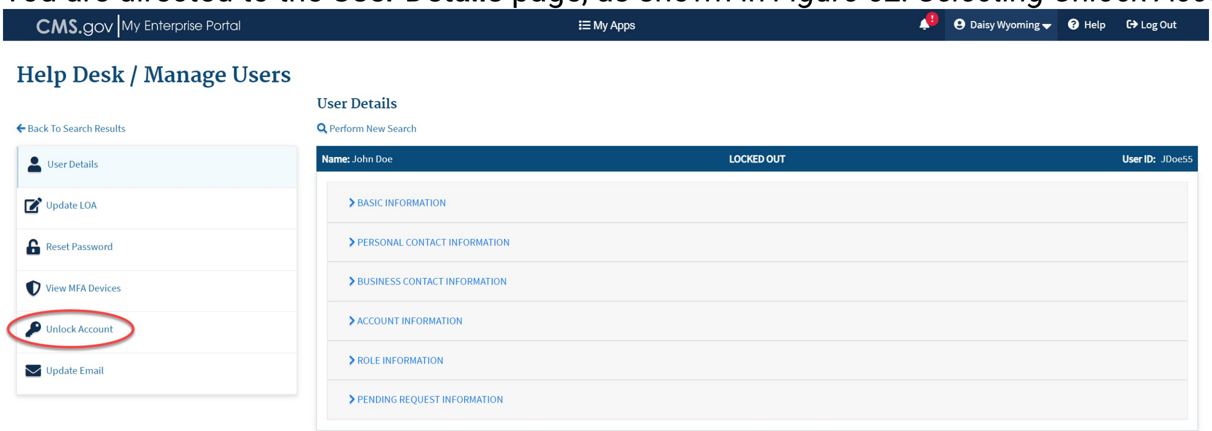

Figure 52: Selecting Unlock Account

6. Click **Unlock Account** in the left pane, as shown in *Figure 52: Selecting Unlock Account*.
   You are directed to the **Unlock Account** page, as shown in *Figure 53: Unlock Account*.

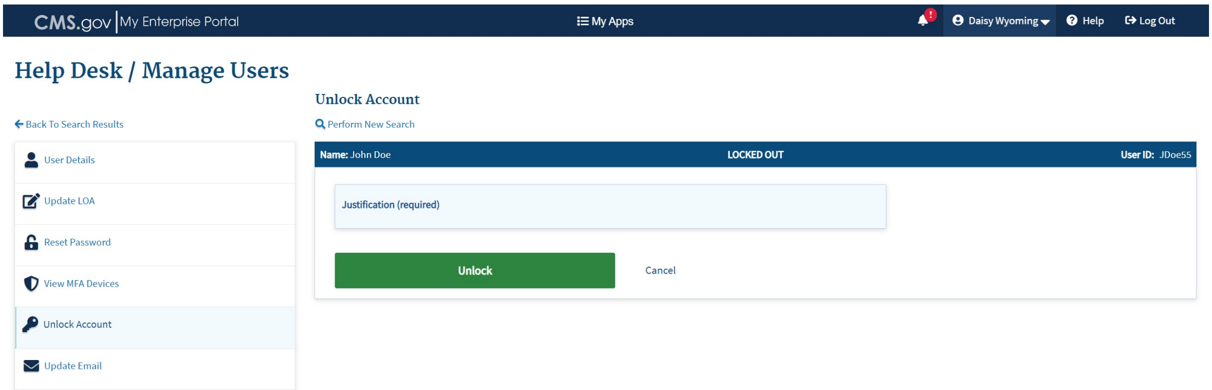

Figure 53: Unlock Account

7. On the **Unlock Account** page, enter a justification for unlocking the user account, as shown in, *Figure 54: Entering Justification for Account Unlock*, and then click **Unlock**.

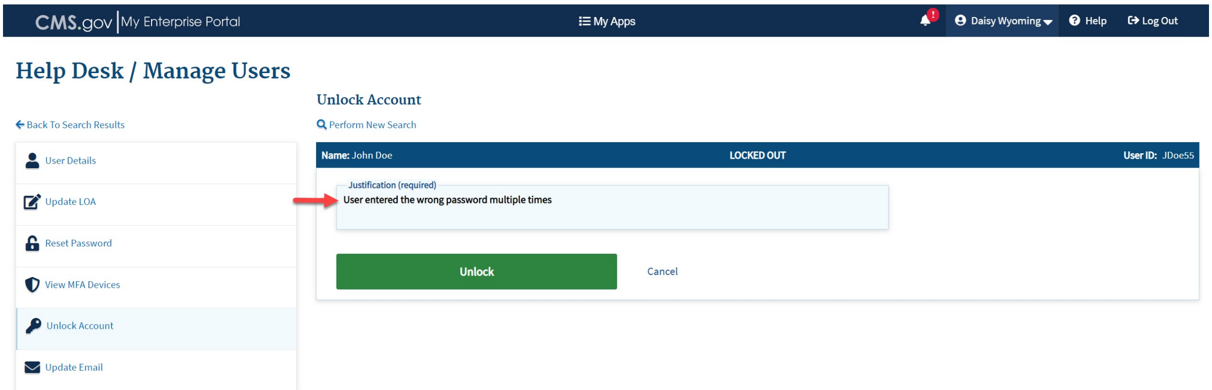

Figure 54: Entering Justification for Account Unlock

You will be prompted to confirm if you want to unsuspend the user's account, as shown in *Figure 55: Account Unlock Confirmation*.

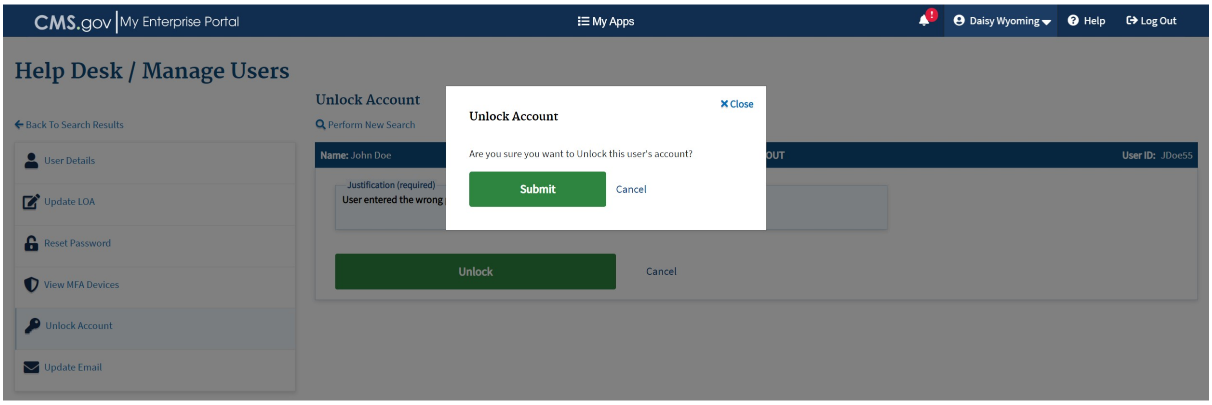

Figure 55: Account Unlock Confirmation

8. In the Unlock Account modal dialog box, click **Submit** to approve the unlocking of user's account. Or click **Cancel** to cancel the unlock request.

9. Confirm that the user's account has been unlocked by viewing the "Account Information" section within the **User Details** page. If the account was unlocked, the user status will show as "Active".

14. Updating User Email Address

This section describes how users with Help Desk privileges can update a user's email address in CMS Enterprise Portal.

The following are the instructions on how to update a user's email.

1. Navigate to the CMS Enterprise Portal public home page.

2. Login using your user ID and password.

3. On the **My Portal** home page, click the **Help Desk/Manage Users** tile.
   The **Application Search** tab of the **Help Desk/Manage Users** page displays, as shown in *Figure 8: Help Desk/Manage Users Page*.

4. Follow the steps in either the *Performing Application Search* or *Performing Enterprise Search sections to complete a valid user search.*

5. On the results page, click the user ID hyperlink of the user you wish to act upon, under the **User ID** column.
   You are directed to the **User Details** page, as shown in *Figure 56: Selecting Update Email*.

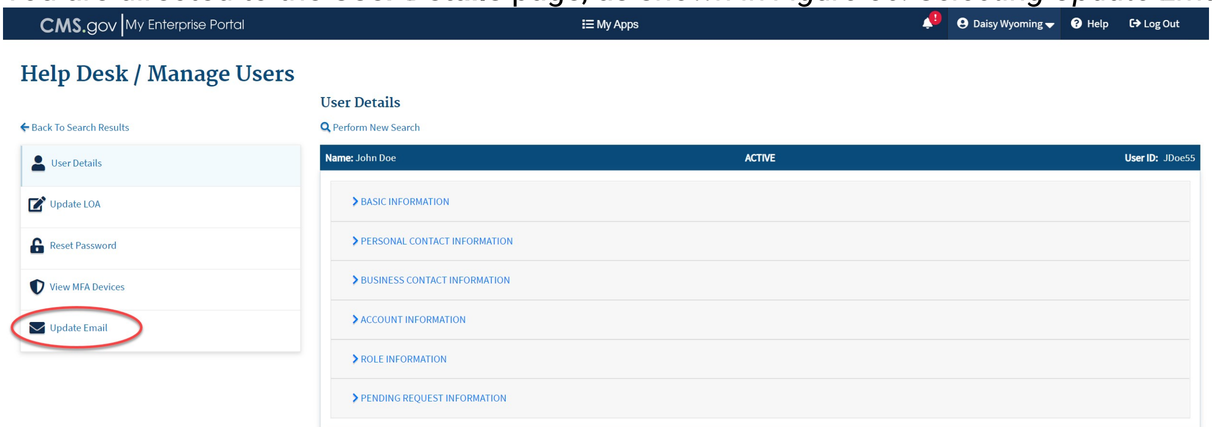

Figure 56: Selecting Update Email

6. Click **Update Email** in the left pane, as shown in *Figure 56: Selecting Update Email*.
   You are directed to the **Update Email** page, as shown in *Figure 57: Update Email*.

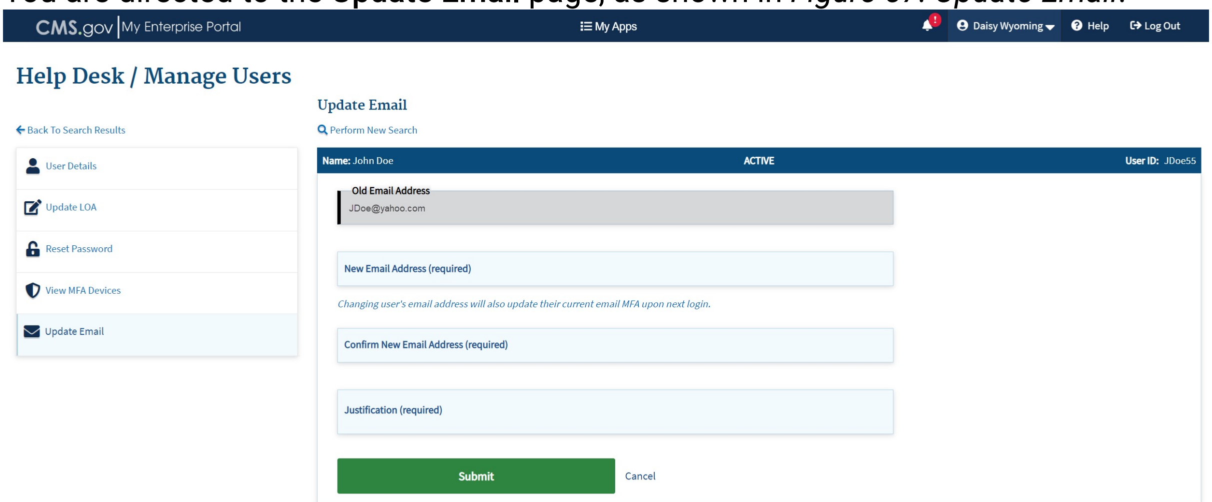

Figure 57: Update Email

7. Enter the new email address in the 'New Email Address' field, then enter it again in the 'Confirm New Email Address' field, as shown in *Figure 58: Enter New Email Information*. Enter a justification for changing the user's email address, and then, click **Submit**.

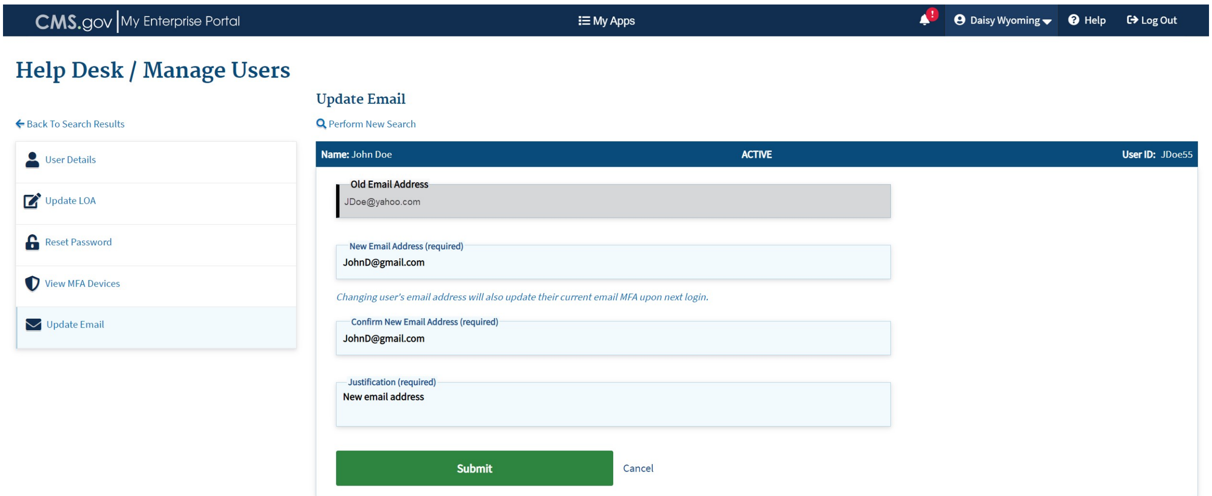

Figure 58: Enter New Email Information

You will be prompted to confirm if you want to update the user's email address, as shown in *Figure 59: Email Update Confirmation*.

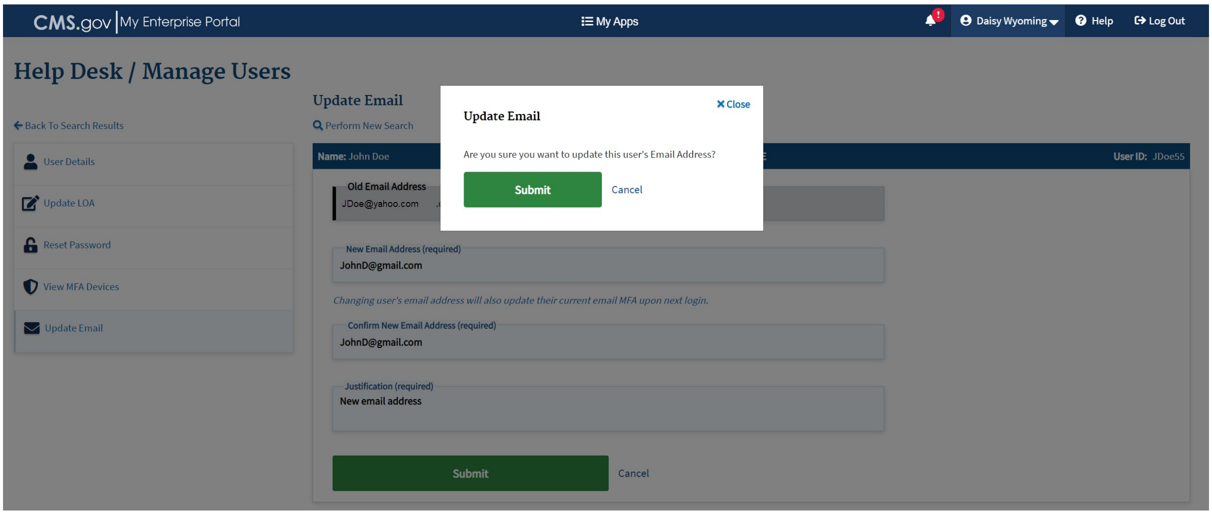

Figure 59: Email Update Confirmation

8. In the Update Email modal dialog box, click **Submit** to approve the email address change. Or click **Cancel** to cancel the update.

15. Appendix: Acronyms

Table 3: Acronyms provides a literal translation of terms used in this document and related to the document.

Table 3: Acronyms

Acronym	Literal Translation
CHIP	Children's Health Insurance Program
CMS	Centers for Medicare & Medicaid Services
DDS	Division of Data Strategy
HHS	Department of Health and Human Services
EADG	Enterprise Architecture and Data Group
EIT	Electronic and Information Technology
EUA	Enterprise User Administration
GPO	Government Printing Office
HIPAA	Health Insurance Portability and Accountability Act
ID	Identifier
IE	Internet Explorer
LOA	Level of Assurance
MFA	Multi-Factor Authentication
OIT	Office of Information Technology
PHI	Personal Health Information
PII	Personally Identifiable Information
PIN	Personal Identification Number
PIV	Personal Identity Verification
UI	User Interface
VPN	Virtual Private Network