



DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services Office of Technology Solutions (OIT) Enterprise System Solutions Group (ESSG)

Identity and Credentialing Tool (ICT) **Roster Owner Guide**

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Version 1.6

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Purpose

A Roster Owner may need to first register for an ICT account before they can manage their roster (refer to section 1.0 in this guide for instructions on the registration process). During the registration process, the email address entered by the user will be matched against the Roster Owner email address in the system. If there is a match between the email address entered by the user during the registration process and the contract's Roster Owner email address, the user will be assigned with the roster owner role. If the roster owner has or receives an EUA account, the roster owner email will need to match the primary email as listed in EUA.

This guide provides instructions for Roster Owners to manage their contract. The selected Roster Owner is responsible for managing temporary and non-temporary users on a contract. A key role for the Roster Owner is the offboarding process. When a user leaves a contract, the Roster Owner will initiate the offboarding process by removing the user from the contract in ICT. The Roster Owner will also ensure any existing user has a Labor Category (LCAT).

The removal process requires the Roster Owner to select a date for the user's removal from the contract in EUA.

If removal is selected for a user that has the contract listed as their primary in EUA, their account will be revoked on the specified date and a delete request will be submitted for the user's account in EUA. If the contract is only a secondary contract for the user, the contract will be removed from their EUA profile on the specified date.

For frequently asked questions, please refer to ICT FAQs.

1.0 Create an ICT Account

If you do not already have an ICT account you must create one to function as a Roster Owner.

The registration process requires the user to first respond to the question, "Do you already have a CMS USERID?

As a new user of ICT, your answer will be "No". The user is required to enter a desired username, password, first name, last name, and an email address. The user will also be required to enter their email address a second time. After the user clicks the "Sign Up" button, the user will receive an email message containing a link to verify the user's ownership of the email address and to enable (activate) the ICT account.

Note: You should use the email that was created by your Company to receive further notifications.

- Click Register from ICT login page (<u>EUA-ICT Home Page</u>).
- 2. Select the **No** radio button to answer the question, "Do you already have a CMS USERID?"

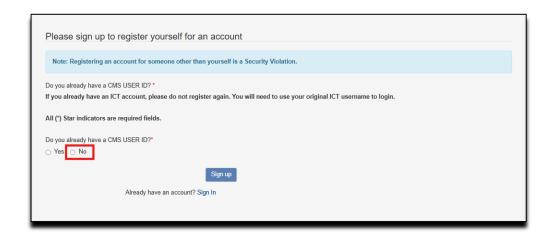


Figure 1: Please Sign Up page

- 3. Enter the personal information requested by the **Please Sign Up** form.
- 4. After you finished filling in all the required fields, click the Sign up button.

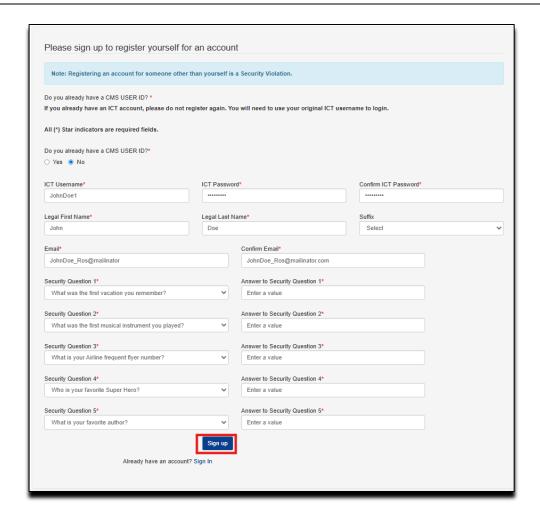


Figure 2: Please Sign Up form required fields

- 5. You will be directed to main HOME page with a confirmation that you successfully have registered and to follow the instructions from the automated email to activate (enable) your ICT account. Please check your JUNK or SPAM folder if you have not received the email directly in your INBOX.
- 6. Click the Activate ICT Account link provided within the email:

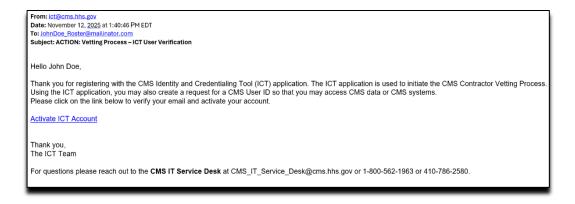


Figure 3: Activate ICT Account Email

- 7. You will be directed to the ICT login page with the following confirmation message "Your account is now verified and active."
- 8. This concludes the Registration process. You will be able to use your user name and password to Log- in ICT.

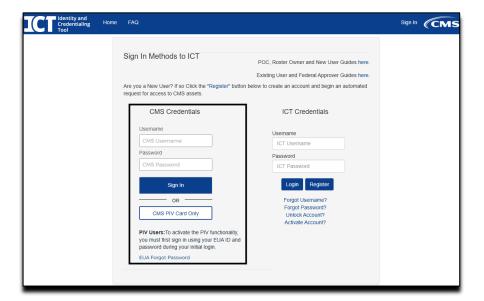


Figure 4: ICT Sign In Page

9. Reference <u>Login with Username/Password</u> section for steps on how to Login with Username / Password.

2.0 Sign in method with CMS ID/Password

If you are a POC and have an EUA ID, you must sign in using your EUA username/password or PIV Card.

Enter https://eua.cms.gov/efi in your preferred web browser to take you to the ICT Sign In page. If you have an active EUA ID, use the EUA Credentials Sign In located on the left side of the page. (Figure 5)

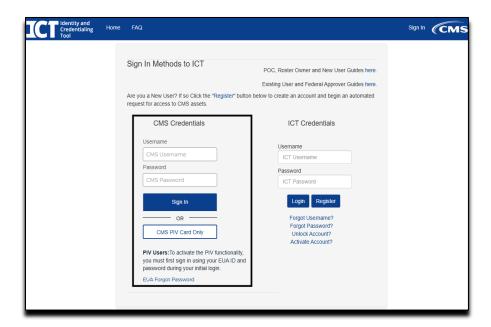


Figure 5: ICT Sign In Page

- 2. Enter your EUA username/password and click Sign In.
- 3. Agree to the terms on the Warning Screen. (Figure 6)

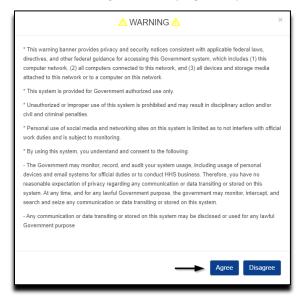


Figure 6: Warning Screen

4. A successful login will take you to the ICT homepage. (Figure 7)



Figure 7: ICT Homepage

3.0 Sign in method with PIV Credentials

Enter https://eua.cms.gov/efi in your preferred web browser to take you to the ICT Sign In page. If you have an active EUA ID, use the EUA Credentials Sign In located on the left side of the page. (Figure 8)

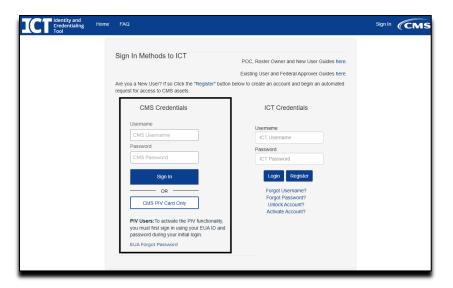


Figure 8: ICT Sign In Page

- 2. Click CMS PIV Card Only.
- 3. **Agree** to the terms on the Warning Screen. (Figure 9)

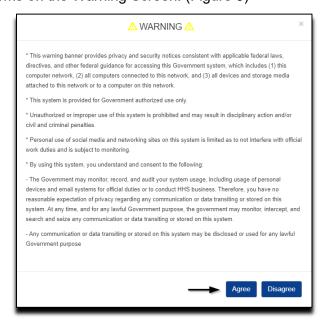


Figure 9: Warning Screen

4. If prompted by your web browser, **select** your PIV certificate. **Enter** your PIV pin in the pop-up ActivClient dialog box and click OK. (**Figure 10**)

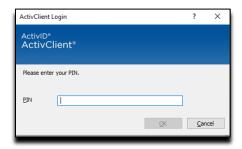


Figure 10: PIV Pin Pop Up

5. A successful login will take you to the ICT homepage. (Figure 11)

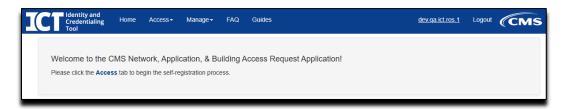


Figure 11: ICT Homepage

4.0 Sign in method with ICT Credentials

If you are a POC and **DO NOT** have an EUA ID, you must sign in using your ICT username/password.

1. Enter https://eua.cms.gov/efi in your preferred web browser to take you to the ICT Sign In page. Use the ICT Credentials Sign In located on the right side of the page. (Figure 12)

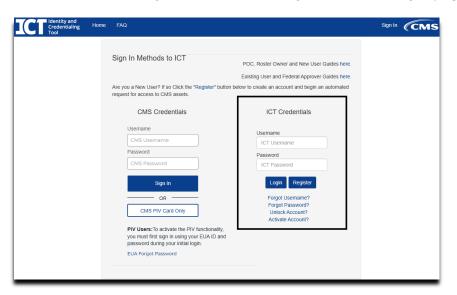


Figure 12: ICT Sign In Page

- 2. **Enter** your ICT username/password and **click** Sign In. The ICT username is case sensitive so it must be entered exactly the same when it was registered.
- 3. Agree to the terms on the Warning Screen. (Figure 13)



Figure 13: Warning Screen

4. A successful login will take you to the ICT homepage. (Figure 14)



Figure 14: ICT Homepage

5.0 How to Manage Your Roster

All users working on a contract should be included on the contract roster, regardless of whether they use EUA or need a PIV.

<u>NOTE:</u> If the person has a CMS email, please ensure the person has an EUA account. Please ensure the email account associated with that EUA user ID is used.

1. Select Manage Contracts from the ICT Manage drop-down menu.



Figure 15: Manage Contract Drop-Down

The Manage Contracts page will display all the contracts you can manage as a Roster Owner. Click the Details link in the Action column to proceed.

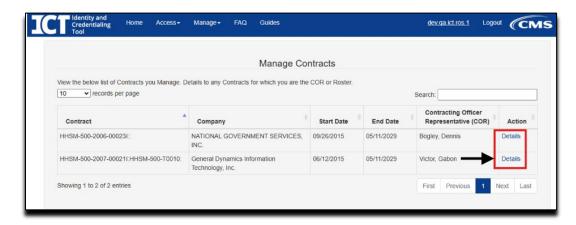


Figure 16: Manage Contracts Page

3. On the Contract Details page, **click** the Update Roster button to manage the roster.

Note: The roster for the contract must be updated every 30 days.

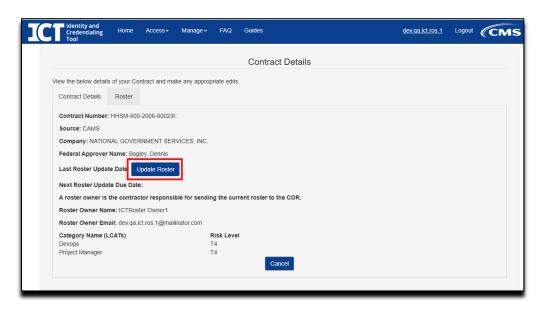


Figure 17: Contract Details Page

4. On the Roster tab, **select** the Labor Category for each user and **select** "Keep" or "Remove". If "Remove" is selected, a date of removal must be entered. **Note:** This graphic shows both EUA and non-EUA users. (EUA users have a 4, 5, 6, or 7-character User ID.)

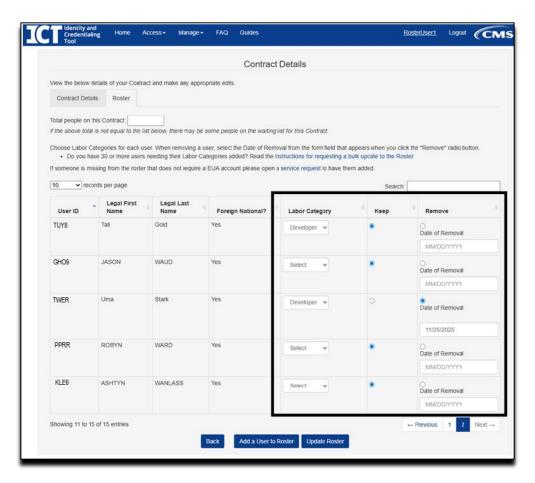


Figure 18: Roster Owner Tab

5. If the contract has 30 or more users to update, the Roster Ownerclicks the "Instructions for requesting a bulk update to the Roster" link. The following pop-up will appear indicating that the Roster must email the required information in a CSV file to the Service Desk at CMS IT Service Desk@cms.hhs.gov. The CSV file must include these columns: First Name, Last Name, Labor Category, Email Address, and ICT ID.

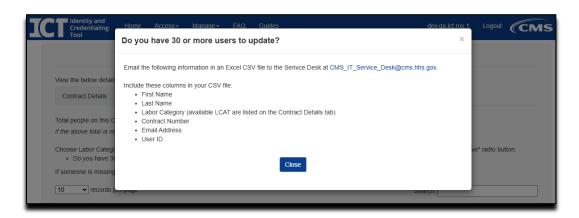


Figure 19: 30 or More Users to Update

6. If the Roster Owner has a **non-EUA user** to add to the Roster, they must click the "Service Request" link. The following pop-up will appear indicating the Roster must email the required information in a CSV file to the Service Desk at CMS IT Service Desk@cms.hhs.gov The CSV file must include these columns: First Name, Last Name, Labor Category, Contract Number, and Email Address.

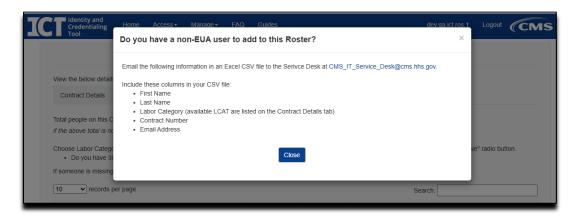


Figure 20: Add Non-EUA User

7. On the Roster tab, type the number of "Total people on this Contract" in the blank, or click the up/down arrows to increase/decrease the number. Click the "Update Roster" button to proceed.

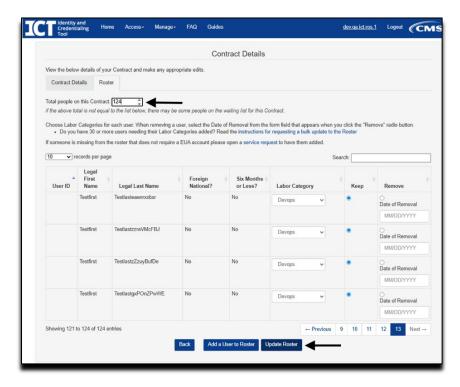


Figure 21: Total People on this Contract

8. Click the **Confirm** button in the pop-up to proceed with the roster update. Any users set to "Keep" will remain on the Contract. Users set to "Remove" will be removed from the Contract on the assigned dates.

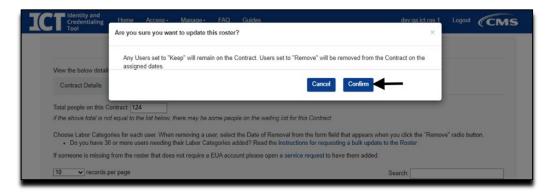


Figure 22: Confirm Roster Update

After a successful roster update, you will be returned to the Contract Details page.
 The Last Roster Update Date and Next Roster Update Due fields will be updated accordingly.

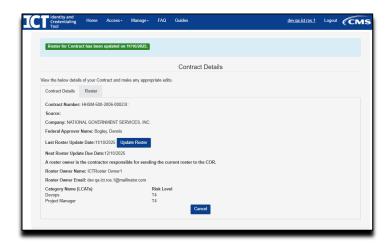


Figure 23: Contract Details Page Following Successful Submission

6.0 How to Add a Temporary user to the Roster

Contractors who will be working **six months or less** will be added to the contract. **Roster Owners** can add users to any contract designated for **"temporary"** contractors. When a contractor is added to the roster, an email notification will automatically be sent containing instructions to **register and complete an ICT application**.

1. Select Manage Contracts from the ICT Manage drop-down menu.



Figure 24: Manage Contract Drop-Down

2. The Manage Contracts page will display all the contracts you can manage as a Roster Owner. Select the contract where the new contractor will be added and then **click** the **Details** link in the Action column to proceed.

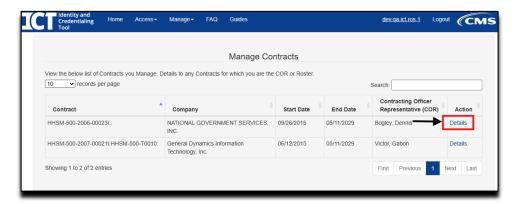


Figure 25: Manage Contracts Page

3. Click the **Roster** tab, the contract will have a distinctive column: "Six Months or Less?". Click the "Add a User to Roster" button to add the contractor.

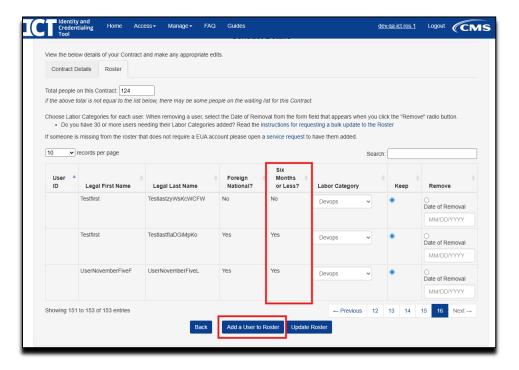


Figure 26: Roster Owner Tab

4. In the pop-up, **you will fill out** the **required fields**: Legal First Name, Legal Last Name, Email, Labor Category and the question "Will this User be working on this Contract for six (6) months or less?". **Note:** This will indicate that the contractor employment term is **six months or less**. *Fields left empty will display a message*.

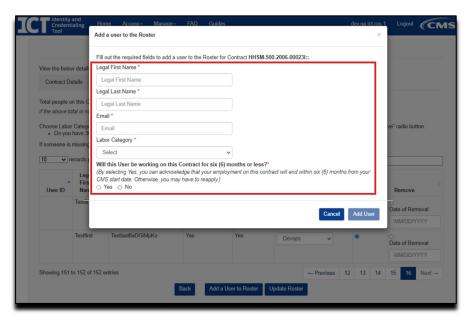


Figure 27: Add a User to Roster pop-up

5. In the pop-up fill out the required fields and select "Yes" to the question "Will this User be working on this Contract for six (6) months or less?* (By selecting Yes, you acknowledge that this person will be working on this contract for six (6) months or less and that they may need to reapply)". Click the "Add User" button.

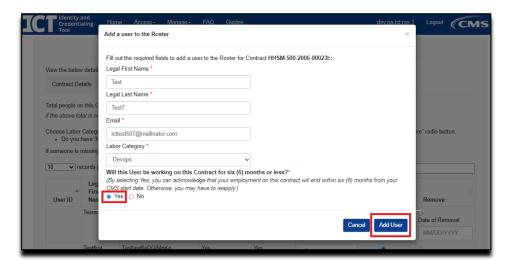


Figure 28: Add a User to Roster pop-up

6. If a user's email address has been used in another contract, the system will display a message: "This email address is already assigned to another contractor".

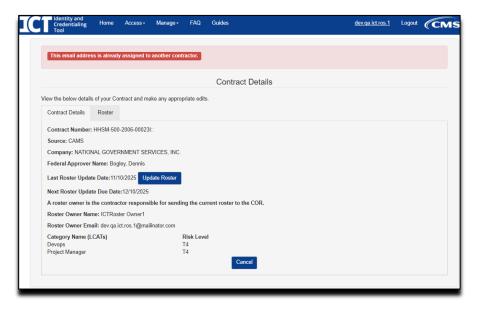


Figure 29: Contract Details page - Message that email address is assign to another contractor

7. Go to the Roster tab and then click the "Add a User to Roster" button. In the pop-up, fill out the required fields and click the "Add User" button. The system will then display the success message: "The user has been added to the contract, and an invitation has been sent to their email address".

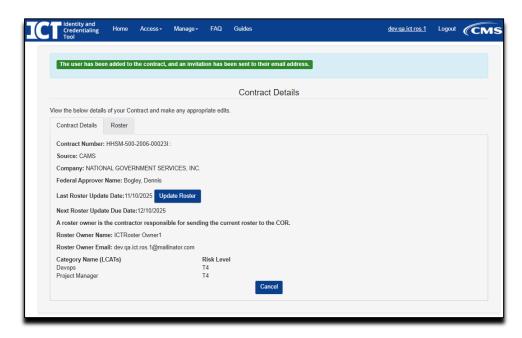


Figure 30: Success Message of the user added to the contract and an email sent

8. Click the **Roster** tab, search for the new user by using the "Search" field. In the column "Six Months or Less?" the user will have the value as "Yes".

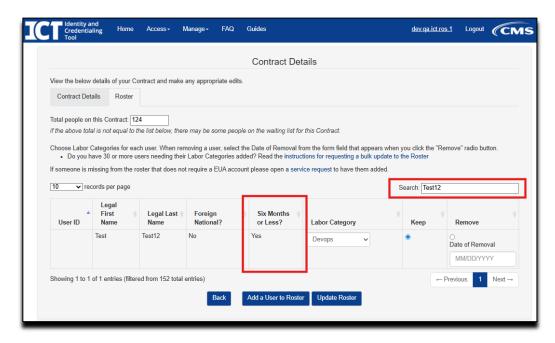


Figure 31: Contract Details - Six Months or Less column

7.0 How to Add a Non Temporary user to the Roster

Contractors who will be working more than six months will be added to the contract. An email notification will be sent to the contractors when added to the roster, with instructions to register and complete an ICT application. As a **Roster Owner**, you can specify that a user is **not temporary** or add a user to a contract that was **determined** to not include temporary contractors.

1. Select Manage Contracts from the ICT Manage drop-down menu.



Figure 32: Manage Contract Drop-Down

2. The Manage Contracts page will display all the contracts you can manage as a Roster Owner. Select the contract where the new contractor will be added and then **click** the **Details** link in the Action column to proceed.

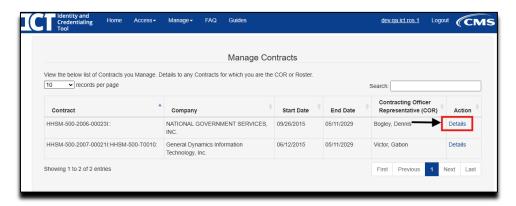


Figure 33: Manage Contracts Page

3. Click the **Roster** tab, the contract will have a distinctive column: "Six Months or Less?". Click the "Add a User to Roster" button to add the contractor.

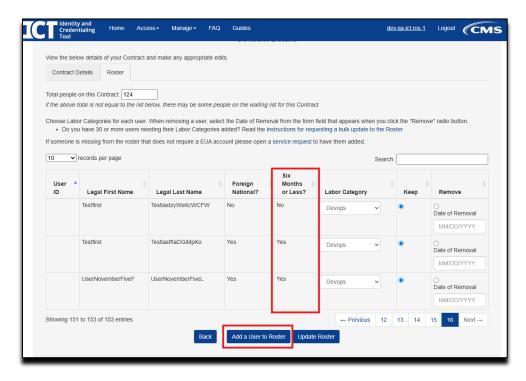


Figure 34: Roster Owner Tab

4. In the pop-up, **you will fill out** the **required fields**: Legal First Name, Legal Last Name, Email, Labor Category and the question "Will this User be working on this Contract for six (6) months or less?". **Note:** This will indicate that the contractor employment term is **more than six months**. Fields left empty will display a message.

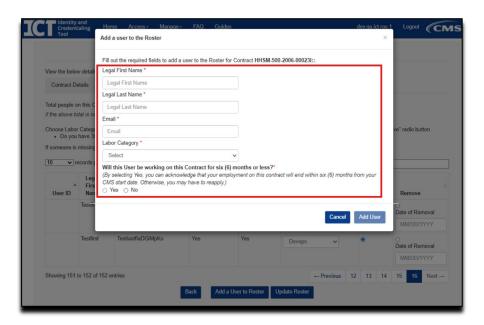


Figure 35: Add a User to Roster pop-up

5. In the pop-up, fill out the required fields and select "No" to the question "Will this User be working on this Contract for six (6) months or less?* (By selecting Yes, you acknowledge that this person will be working on this contract for six (6) months or less and that they may need to reapply)". Click the Add User button.

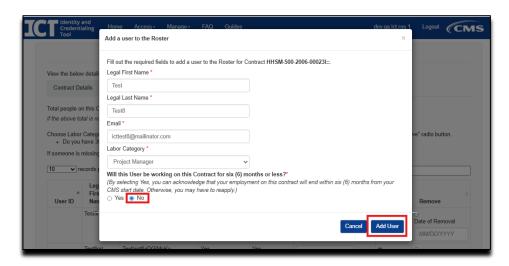


Figure 36: Add a User to Roster pop-up

6. If a user's email address has been used in another contract, the system will display a message: "This email address is already assigned to another contractor".

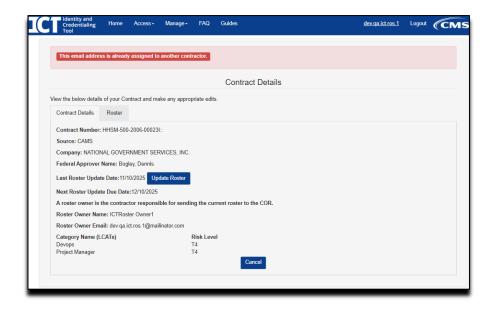


Figure 37: Contract Details page - Message that email address is assign to another contractor

7. Go to the Roster tab and then click the "Add a User to Roster" button. In the pop-up, fill out the required fields and click the "Add User" button. The system will then display the success message: "The user has been added to the contract, and an invitation has been sent to their email address".

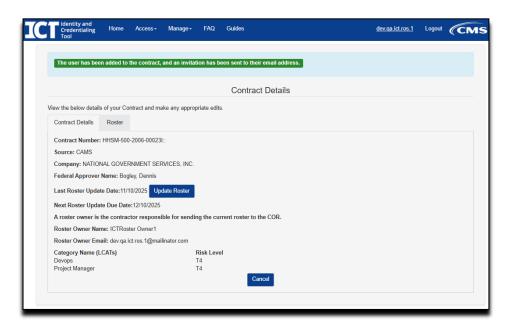


Figure 38: Success Message of the user added to the contract and an email sent

8. Click the **Roster** tab, search for the new user by using the "Search" field. In the column "Six Months or Less?" the user will have the value as "No".

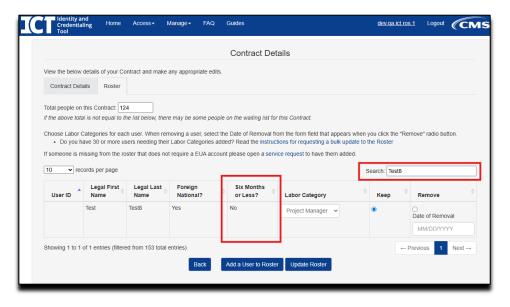


Figure 39: Contract Details - Six Months or Less column

Click the "Back" button to return to the Manage Contracts page. Select the
contract that was determined to not include temporary contractors and then
click the Details link in the Action column to proceed.

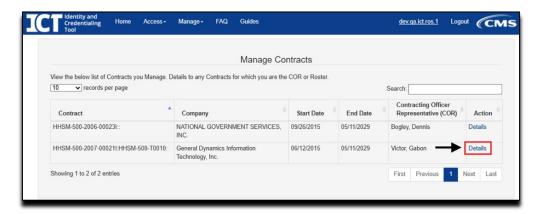


Figure 40: Manage Contracts Page

10. Click the **Roster** tab. The contract view will now show a column called "Foreign National?". **Click** the "**Add a User to Roster**" button to add the contractor.

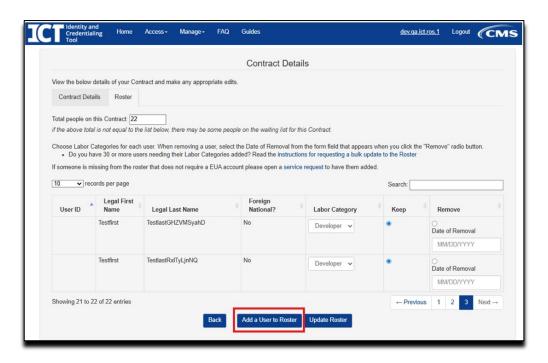


Figure 41: Contract Details Page

11. In the pop-up, **you will fill out the required fields**: Legal First Name, Legal Last Name, Email and Labor Category. **Click** the **Add User** button. **Note:** *Fields left empty will display a message*.

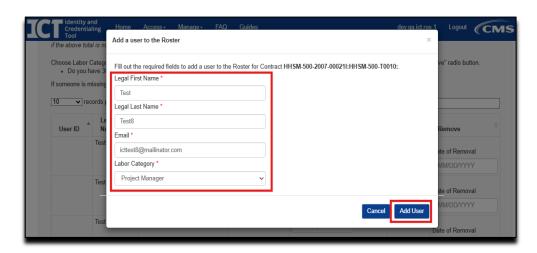


Figure 42: Add a User to Roster pop-up

12. If a user's email address has been used in another contract, the system will display a message: "This email address is already assigned to another contractor".

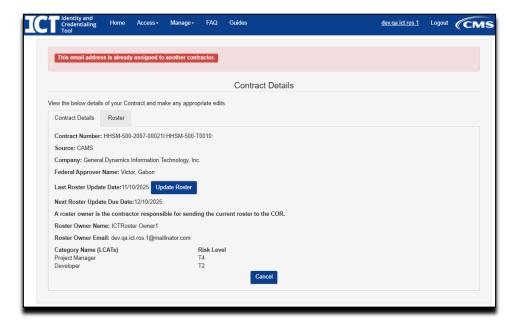


Figure 43: Contract Details page - Message that email address is assign to another contractor

13. Go to the Roster tab and then click the "Add a User to Roster" button. In the popup, fill out the **required fields** and click the "Add User" button. The system will display the success message: "The user has been added to the contract, and an invitation has been sent to their email address".

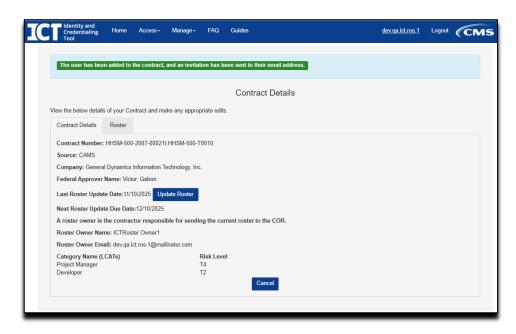


Figure 44: Success Message of the user added to the contract and an email sent

14. Click the Roster tab, search for the new user by using the "Search" field.

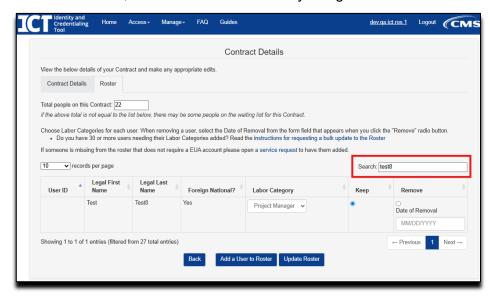


Figure 45: Contract Details Search Field

8.0 Issues viewing your Roster

If you are having issues viewing your roster please see the following:

- Do you have an EUA ID? Ensure the COR used the email value listed in "Email" on your EUA account.
- If you do not have an EUA ID, ensure that the COR used the email listed on your ICT account profile

Review the FAQ Section in ICT ICT FAQs

9.0 Revision History

Date	Version	Description of Changes
11/18/2024	1.1	Added new field "Total people on this contract" in the Contract Details screen and added corresponding screenshots.
12/18/2024	1.2	Added link to ICT FAQs in "Purpose" section. Changed graphic (Figure 4) to include EUA and non-EUA users.
01/13/2025	1.3	Updated graphic for Roster Update Page Keep/Remove (Figure 4). Added graphics and descriptions for Bulk LCAT changes for more than 30 people (Figure 5) and for Service Request for non-EUA users (Figure 6).
02/11/2025	1.4	Updated graphic for "Update Roster" button (Figure 3).
03/04/2025	1.5	Under How to Manage a Contract ABOVE Select Manage Contracts from the ICT Manage Drop-down Menu: created a section called "Registering and Creating ICT Account". Under Figure 1: Manage Contract Drop-Down: added a statement that says, "All users working on a contract should be included on the contract roster, regardless of whether they use EUA or need a PIV." Added a statement that says, "If the person has a CMS email, please ensure the person has an EUA account. Please ensure the email account associated with that EUA user ID is used." Added in Sections 1-4 from POC Guide to explain how to create an ICT account. Added in first paragraph of "Purpose" section, detailing what types of users should appear on the roster. Created Table of Contents.
11/17/2025	1.6	Updated the text in the "Purpose" section to include "temporary and non-temporary" in the Roster Owner responsibility.

Updated screenshots under the following sections:

Section 1.0 Create an ICT Account (Figures 1 to 4)

Section 2.0 Sign in method with CMS ID/Password (Figures 5 to 7)

Section 3.0 Sign in method with PIV Credentials (Figures 8 to 11)

Section 4.0 Sign in method with ICT Credentials (Figures 12 to 14)

Information and screenshots updated under the following section:

Section 5.0 How to Manage Your Roster Figures (Figures 15 to 23)

Moved information before Step 1 (added previously after Figure 15).

Updated some information in Step 4.

Updated information in Step 5, Step7 and Step 8.

New sections added with information and screenshots:

Section 6.0 How to Add a Temporary user to the Roster Section 7.0 How to Add a Non Temporary user to the Roster

Updated information for the following section:

Section 6.0 Troubleshooting changed to Section 8.0 Issues viewing your Roster

Updated some information.