Salesforce Single Sign-On Guidance

This Salesforce sign-on process guide is to help you with the registration and login process. This document provides quick access to resources and best practices while navigating the system.

IMPORTANT INFORMATION

- » You must use your CMS credentials (e.g., EUA, HARP, or EDIM) to access your Model's Portal.
- » If you do not have compatible CMS credentials, you will need to register for CMS Identity Management (IDM) credentials.
- » Remote Identity Proofing (RIDP) is now required for access to Model tools. This is a one-time process that all users will need to complete.
- » Note: If you have access to multiple CMS tools, you will access a centralized landing page where you can access all applications.

ADDITIONAL RESOURCES



Connect users who have an <u>existing CMS OKTA IDM account</u> should follow the link for guidance. OKTA is a cloud based identity and access management platform used by CMS.

Connect users who need to **create an OKTA IDM account** should follow the link for guidance.

Follow the link for a <u>live demo</u> of the process.

BEST PRACTICES

REMOTE IDENTIFY PROOFING

- ✓ RIDP is the process of validating sufficient information that uniquely identifies you.
- ✓ Be prepared to input legal first, middle, and last name, personal address, date of birth, personal phone number, and social security number.
- ✓ Ensure you are using your personal, not business, information.
- ✓ You will be presented with a list of questions that only you should know and will have ten minutes to answer.
- ✓ You can go through this process more than once if necessary.
- ✓ If you are not comfortable completing this process online, you may request a manual version from the HelpDesk. Note that this process takes longer.

MULTIFACTOR AUTHENTICATION (MFA)

- ✓ MFA is an approach to security authentication that requires you to provide more than one form of a credential to prove your identity. You only need to select one option.
- ✓ Options include:
 - 0

OKTA – Use a push notification sent to the mobile application



Google Authenticator – Enter single-use code from the mobile application



SMS Authenticator – Enter a single-use code sent to your mobile phone



Voice Call Authenticator – Use a phone to authenticate by voice instructions



Email Authenticator – Enter a verification code sent to your email

✓ Follow the link to setup an <u>alternate MFA</u> factor(s).

ONGOING SUPPORT

- » If you have additional questions, be on the lookout for **Office Hours**.
- » Contact the CMMI Salesforce Help Desk at 1-888-734-6433, option 5
- » Contact the CMMI Salesforce Email at CMMIForceSupport@cms.hhs.gov

