Abbreviated Reference Guide for Existing Users Adding Multi-Factor Authentication (MFA) to their Health Insurance Oversight System (HIOS) Application Role

What is Multi-Factor Authentication (MFA)?

MFA is a security mechanism that is implemented to verify the legitimacy of a person or transaction. MFA requires you to provide more than one form of verification in order to prove your identity. MFA registration is required only once when you are requesting a role, but will be verified every time you log into the CMS Enterprise Portal. During the MFA registration process, the CMS.gov Enterprise Portal requires registration of a phone, computer, or email to add an additional level of security to a user's account. You may select from the following options to complete the registration process:

- **Smart Phone/Tablet/Computer**: Download Verification and Identity Protection (VIP) Access software on your smart phone/tablet/computer. You must enter the alphanumeric credential ID that is generated by the VIP Access client. You will then enter the Security Code generated by the VIP client.
- **E-mail**: Select the e-mail option to receive an e-mail containing a Security Code required at login. You must provide a valid, accessible e-mail address.
- **Short Message Service (SMS)**: Use the SMS option to have your Security Code texted to your phone. You must enter a valid phone number. The phone must be capable of receiving text messages. Carrier charges may apply.
- **Interactive Voice Response (IVR)**: Select the IVR option to receive a voice message containing your Security Code. You must provide a valid phone number and (optional) phone extension.

If you have questions about or need assistance regarding MFA, please contact the Exchange Operations Support Center (XOSC) at CMS_FEPS@cms.hhs.gov or 1-855-267-1515.

Register an MFA Device

Users with an active CMS Enterprise Portal account and a HIOS user role need to follow the steps below to register an MFA device.

1. Go to https://portal.cms.gov and select ***Login to CMS Secure Portal*** on the CMS Enterprise Portal (See Figure 1). ***Note:*** *The CMS Enterprise Portal supports the following internet browsers: Internet Explorer 8, 9, 10, and 11, Mozilla-Firefox, Chrome, and Safari.*
2. Read the Terms and Conditions and select ***I Accept*** to continue.
3. Enter your ***User ID*** and select ***Next.***
4. Select the ***Register MFA Device*** link (See Figure 2).
5. Select ***OK*** to navigate away from the login page.
6. Read the Terms and Conditions and select ***I Accept***.
7. Enter your ***User ID*** and ***Password***, and select ***Log In.***
8. Answer the challenge questions and select ***Next***.
9. Select an MFA device from the ***MFA Device Type*** dropdown. Refer to the MFA Device Options section of this guide for details on each device type (See Figures 3-6). Follow the on-screen instructions for your selected device type to complete the registration.
10. You'll see an on-screen message confirming successful registration of the device to your user profile. Click ***OK*** to continue. ***Note:*** *You will receive an e-mail notification for successfully registering the MFA Device Type.*
11. Enter your ***User ID*** and select ***Next*** to continue to log in. Refer to the Login Using MFA section of this guide for steps to log in using your registered MFA device.

Note: *If you register prior to June 19 you'll need to navigate to the CMS Portal "My Profile" page to register an MFA device.*

Figure 1: CMS Enterprise Portal Home Page

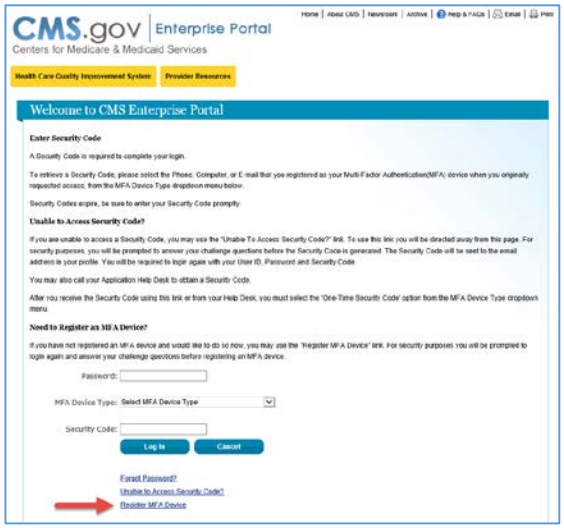

Figure 2: Register MFA Device Link

MFA Device Options

A) If selecting ***Text Message – Short Message Service (SMS)*** as the **MFA Device Type**, enter the ***Phone Number*** that will be used to obtain the Security Code. Enter a brief description (e.g., Text) in the field labeled ***MFA Device Description*** and select ***Next***.

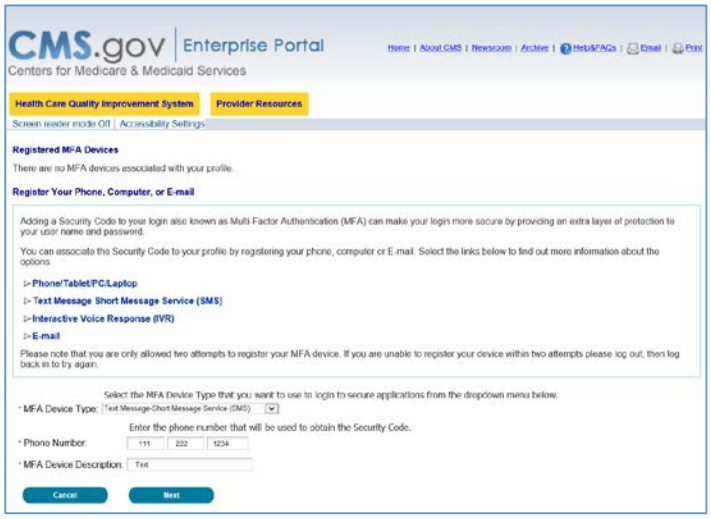

Figure 3: MFA Option A - Text Message - Short Message Service (SMS)

B) If selecting ***E-mail*** as the **MFA Device Type**, the E-mail address on your profile will be automatically used to obtain the Security Code. Enter a brief description (e.g., E-mail) in the field labeled ***MFA Device Description*** and select ***Next***.

Note: *The E-mail address cannot be changed at the time of MFA device registration. It can only be changed using the 'Change E-Mail Address' option from the 'Change My Profile' menu.*

Figure 4: MFA Option B - E-mail

C) If selecting ***Phone/Tablet/PC/Laptop*** as the ***MFA Device Type***, enter the alphanumeric code that displays under the field labeled Credential ID (on the VIP Access software*****) in the ***Credential ID*** field. Enter a brief description (e.g., Laptop) in the field labeled ***MFA Device Description***. Then select ***Next***.

Note: **The link to download the VIP Access software can be found by clicking on the Phone/Tablet/PC/Laptop option.*

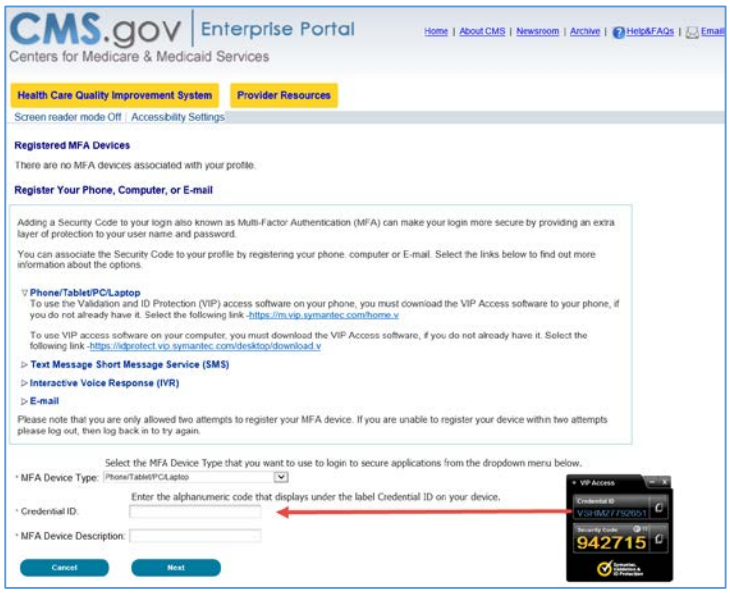

Figure 5: MFA Option C - Phone/Tablet/PC/Laptop and VIP Access Software

D) If selecting ***Voice Message – Interactive Voice Response (IVR)*** as the **MFA Device Type**, enter the ***Phone Number*** *and* corresponding ***Extension*** that will be used to obtain the Security Code. Enter a brief description (e.g., IVR) in the field labeled ***MFA Device Description*** and select ***Next.***

Note: Extension *is an optional field. You may choose to provide a 10-digit phone number or a phone number with an extension.*

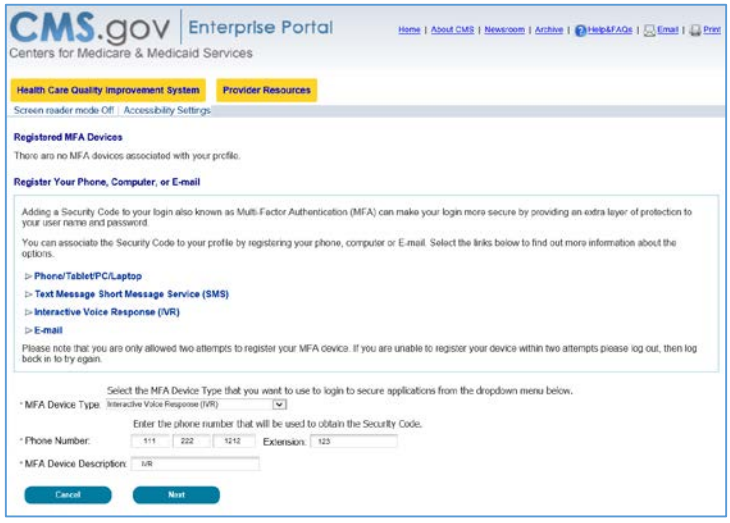

Figure 6: MFA Option D - Voice Message - Interactive Voice Response (IVR)

Login Using MFA

After registering an MFA device, follow the steps below to log in to the CMS Enterprise Portal.

1. Go to https://portal.cms.gov and select ***Login to CMS Secure Portal*** on the CMS Enterprise Portal.

2. Read the Terms and Conditions and select ***I Accept*** to continue.

3. Enter your ***User ID*** and select ***Next.***

4. Enter your ***Password,*** select an MFA device from the ***MFA Device Type*** dropdown, and select ***Log In***.

   Note: *The Security Code for E-mail and One-Time Security Code will expire in 30 minutes. The Security Code for the other MFA device types will expire in 10 minutes. If you are unable to enter the code within the period, you will need to request a new Security Code.*

   4(a). If you select ***Phone/Tablet/PC/Laptop*** as the ***MFA Device Type***, enter the Security Code that displays under the field labeled Security Code (on the VIP Access software) in the ***Security Code*** field. Select ***Log In*** (See Figure 7)***.***

   4(b). If you select ***Text Message – Short Message Service (SMS)*** or ***Interactive Voice Response (IVR)*** or ***E-mail*** as the ***MFA Device Type,*** select ***Send*** to receive the Security Code on the selected MFA device type. Enter the Security Code in the ***Security Code*** field and select ***Log In*** (See Figure 8).

   4(c). If you select ***One-Time Security Code*** as the ***MFA Device Type,*** enter the Security Code that was sent to your registered E-mail address via the 'Unable to Access Security Code?' link or provided by the Helpdesk, in the ***Security Code*** field. Select ***Log In*** (See Figure 9). Refer to the below steps 5-11 for details on using a One-Time Security Code.

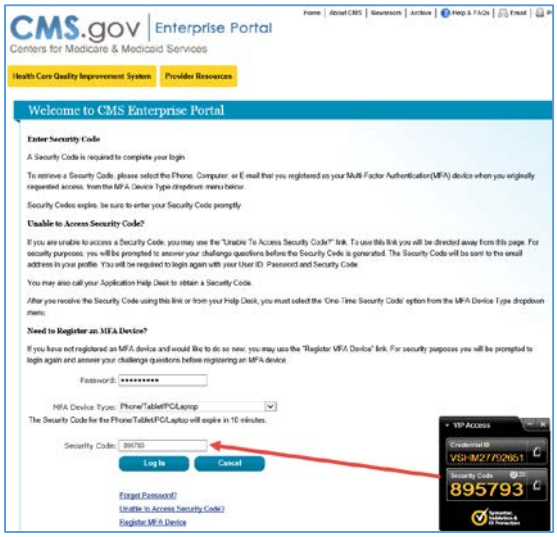

Figure 7: MFA Device Type: Phone/Tablet/PC/Laptop

Figure 8: MFA Device Type: Interactive Voice Response (IVR)

Figure 9: MFA Device Type: One-Time Security Code

5. If you are not able to access your Security Code, select the ***'Unable to Access Security Code?'*** link. On selecting this link, the ***'Unable to Access Security Code'*** popup message will be displayed. Select ***OK*** to continue (See Figure 10).

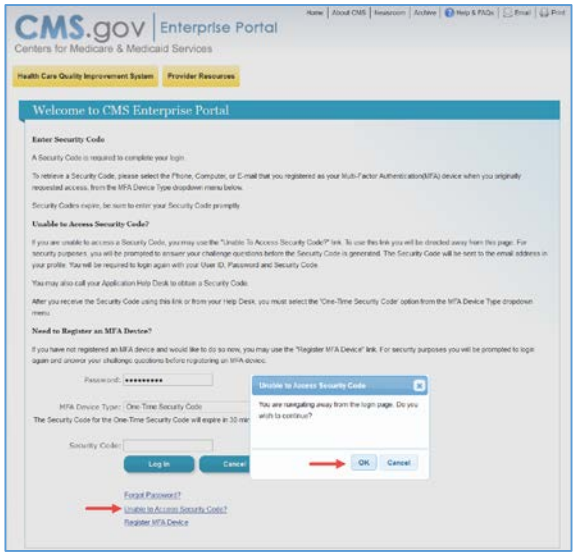

Figure 10: Unable to Access Security Code - Select OK

Login Using MFA

6. Enter your ***User ID*** and select ***Next***.

7. Answer the challenge questions and select ***Next***.

8. You'll see an on-screen message informing you that the Security Code has been sent to the E-mail address on your profile. Select ***OK*** to return to the login page. ***Note:*** *This security code will expire in 30 minutes or after it is used successfully for the first time.*

9. Read the Terms and Conditions and select ***I Accept*** to continue.

10. Enter your ***User ID*** and select ***Next***.

11. Enter your ***Password***, select ***One-Time Security Code*** as the ***MFA Device Type***, and enter the ***Security Code*** that was sent to the E-mail address on your profile. Then select ***Log In*** (See Figure 11).

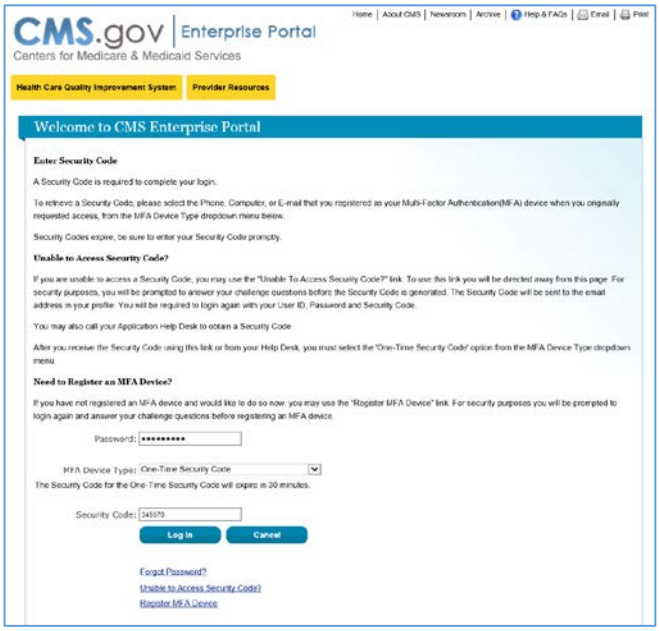

Figure 11: Enter Password, Select One-Time Security Code, and Enter Security Code

Remove a Registered MFA Device

Follow the steps below to remove a registered Phone, Computer, or E-mail.

1. Go to https://portal.cms.gov and select ***Login to CMS Secure Portal*** on the CMS Enterprise Portal.

2. Read the Terms and Conditions and select ***I Accept*** to continue.

3. Enter your ***User ID*** and select ***Next.***

4. Enter your ***Password,*** select an MFA device from the ***MFA Device Type*** dropdown, enter the ***Security Code***, and select ***Log In*** (See Figure 12). ***Note:*** *You should select the* ***MFA Device Type*** *that you previously registered.*

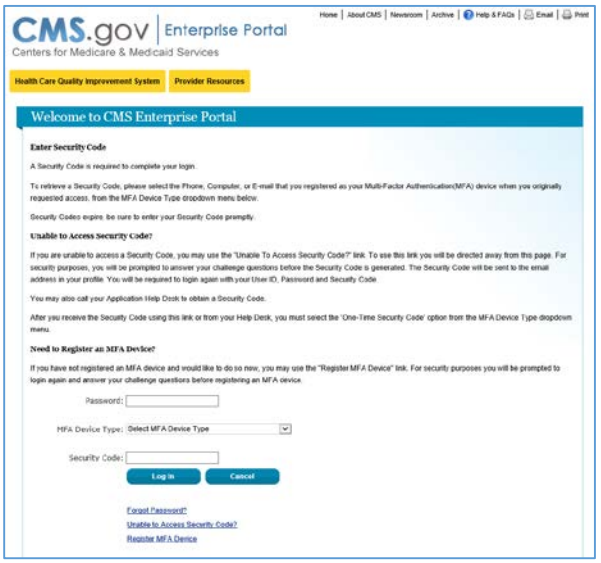

Figure 12: Enter Password, Select MFA Device Type, and Enter Security Code

Remove a Registered MFA Device

5. On the My Portal page, select your username and then select ***My Profile*** from the dropdown menu (See Figure 13).

6. Select the ***Remove Your Phone, Computer, or E-mail*** link to remove a registered MFA device from your profile (See Figure 14). Please note, you must have more than one device type registered before you can successfully remove an MFA device.

7. Select the radio button next to the device you wish to remove, select ***Send Security Code***, enter the security code received on the selected MFA Device Type, and select ***Next*** to proceed (See Figure 15). ***Note:*** *Selecting* ***Cancel*** *will end the device removal process.*

8. Removal of your registered MFA device is now complete. Select ***OK*** to proceed. ***Note:*** *You will receive an E-mail notification for successfully removing the MFA device.*

9. You will need at least one MFA device registered to your profile to continue to access your application using MFA. To remove the last registered device from your profile, you will need to register a new device to your profile.

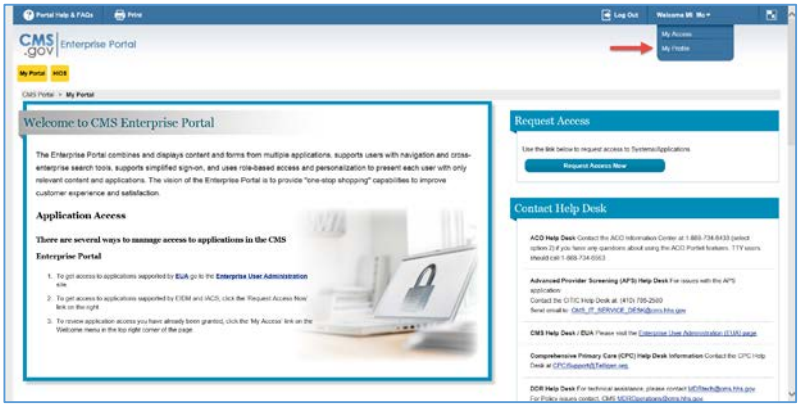

Figure 13: CMS Enterprise Portal - My Profile

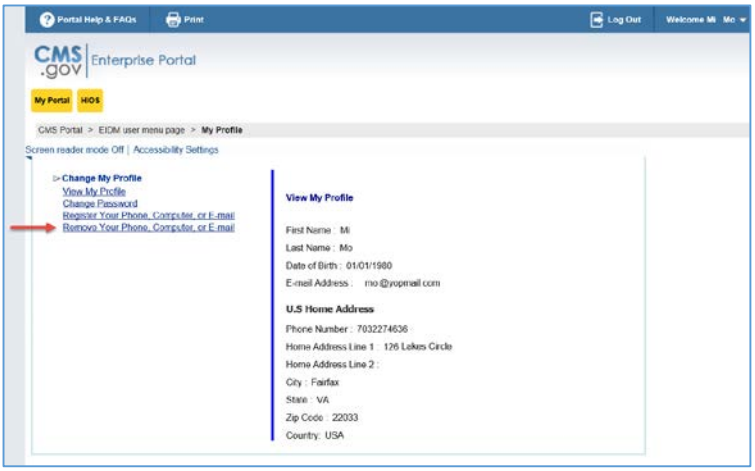

Figure 14: My Profile - Remove Your Phone, Computer, or E-mail

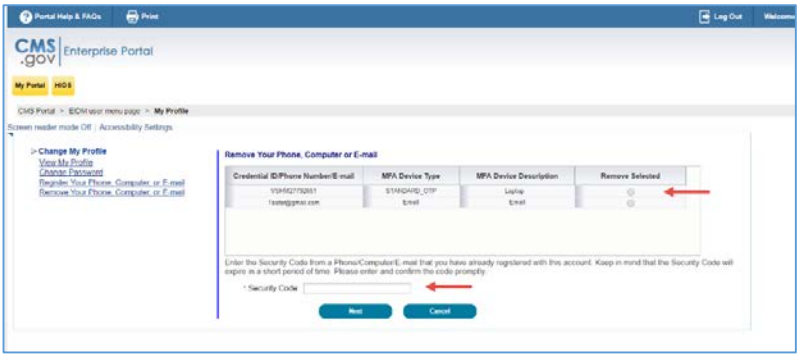

Figure 15: Enter Security Code to Remove Your Phone, Computer, or E-mail