**CMS Enterprise Identity Management (EIDM) USER ACCOUNT REGISTRATION**

# Introduction

The Centers for Medicare & Medicaid Services (CMS) is a federal agency that ensures health care coverage for more than 100 million Americans. CMS administers Medicare and provides funds and guidance for all of the 50 states in the nation, for their Medicaid programs and Children’s Health Insurance Program (CHIP). CMS works together with the CMS community and organizations in delivering improved and better coordinated care.

## What is EIDM?

CMS has established the Enterprise Identity Management (EIDM) system to provide our Business Partners with a means to apply for, obtain approval, and receive a single User ID they can use to access one or more CMS applications.

## What You May Need Before You Begin

Prior to requesting access, you should have received instructions from your organization or CMS contact. The instructions should include application-specific information you may need to complete the request, such as:

* Social Security Number (SSN) / Taxpayer Identification Number (TIN)
* Legal Business Name (LBN) or Organization
* Application Name
* Application Role
* Other information specific to your application, for example, Contract Number, Gentran Mailbox, National Provider Identifier (NPI), Organization number.
* You will have to create a user ID and password of your choosing if you do not already have a user ID and password. EIDM allows you to create a User ID up to 74 characters. However, some applications have restrictions on the number of characters, and special characters, you can have in the User ID you create. Check with your CMS point of contact to identify restrictions for your application.
* Not every CMS application requires the same information, so it is important to get the specifics directly from your organization or CMS contact.

# User Instructions

## How to Register and Create a User ID and Password

This section provides information on how to register and create a user ID and password. The following are the basic step-by-step instructions.

| **Step** | **Action** |
| --- | --- |
| **Step 1** | Navigate to [https://portal.cms.gov](https://portal.cms.gov/). The **CMS Enterprise Portal** page is displayed, as illustrated below.  Snapshot of CMS Enterprise Portal Page |
| **Step 2** | Select the New User Registration link.  Select New User Registration. |
| **Step 3** | Read the **Terms and Conditions**, select **I agree to the terms and conditions**, and then select **Next** to continue with the registration process.  The CMS Terms and Conditions page is displayed and the I agree to the terms and conditions checkbox, which is checked, and there is an arrow pointing to the Next button. |
| **Step 4** | The **Your Information** page is displayed.  Providethe information requested on the **Your Information** page. The fields with an asterisk (\*) are required fields and have to be completed.  After all required information has been provided, select **Next** to continue.  *Note: You may select* ***Cancel*** *at any time to exit out of the registration process. New information or changes entered will not be saved.*  The Your Information Page is displayed. The name, email address, social security number, date of birth, address, and telephone fields that have to be filled in are displayed and there is an arrow pointing to the Next button that has to be selected to continue. |
| **Step 5** | After providing the required information on the **Your Information** page, the **Choose User ID and Password** page is displayed.  Create and enter a user ID of your choice, based on the requirements for creating a user ID.  *Note: EIDM will display instructions on what you are required to include in your user ID.*  The Choose User ID and Password page and the user id, password, and confirm password fields are displayed. There is an arrow pointing to the  User ID field that has to be filled in. |
| **Step 6** | Create and enter a password of your choice.  *Note: EIDM will display instructions on what you are required to include in your password.*  Enter the same password in the **Confirm Password** field.  *Note: The passwords must match before you can continue.*  The Choose User ID and Password page is displayed with additional fields, including an arrow pointing to the Password and Confirm password fields that have to be filled in. |
| **Step 7** | After entering the user ID and password you have created, select a question of your choice in the **Select your Challenge Questions** **and Answers** section and enterthe answer you want to be saved with the question.  Continue to select a question and enter an answer for Question 2 and Question 3.  Select **Next** to complete the registration process.  *Note: You may select* ***Cancel*** *to exit out of the registration process. New information or changes entered will not be saved.*  The Choose User ID and Password page continues to be displayed with additional fields, including the three Select your Challenge Questiongs and Answers fields that have to be filled in to continue. |
| **Step 8** | After selecting **Next**, the **Registration Complete** page is displayed and informs you that you will receive an E-mail acknowledging your successful registration and will include your user ID.  Select **OK** to close the **Registration Complete** page.  The Registration Complete page is displayed, including the messages: you will receive an email acknowledging your successful registration and it will include your User ID, and there is an arrow pointing to the OK button to exit out of the page. |

## How to Login

This section provides information on how to Login using your user ID and password. The following are the basic step-by-step instructions.

| **Step** | **Action** |
| --- | --- |
| **Step 1** | Navigate to [https://portal.cms.gov](https://portal.cms.gov/). The **CMS Enterprise Portal** page is displayed, as illustrated below.  Snapshot of CMS Enterprise Portal |
| **Step 2** | Select Login to CMS Secure Portal.  Select Login to CMS Secure Portal |
| **Step 3** | Read the **Terms and Conditions** and select **I Accept** to continue.  Choose "I Accpet" on the Terms and Conditions Page |
| **Step 4** | Enter your **User ID** and select **Next** to continue.  Enter your User ID and select Next to continue. |
| **Step 5** | Enter your **Password** and select **Log In**.  Enter your Password and select Log In.  After logging in, the **Welcome to CMS Enterprise Portal** page is displayed.  CMS Portal Home Page |

## Identity Verification

Depending on the role and the information you provide, the system may take you to the Identity Verification page. The Identity Verification process, also known as Remote Identity Proofing (RIDP), is necessary for roles that require a higher level of security to access. Identity Verification is done by asking you questions based on your personal information.

*Note: CMS uses credit reporting agencies like Experian to verify identity information. This is only an inquiry and will not affect your credit score.*

To begin the Identity Verification process, follow these steps:

| **Step** | **Action** |
| --- | --- |
| **Step 1** | If you select a role that requires identity verification, you will first be directed to the **Identity Verification** page.  Select **Next**, to begin the Identity Verification process.  Click next on the Identitiy Verification Page |
| **Step 2** | Readthe important **Terms and Conditions** information on this screen and indicate your agreement by selecting the **I agree to the terms and conditions** checkbox. Select the **Next** button to continue.  Select the I Agree to the Terms and Conditions button on the Terms and Conditions Page, then click Next |
| **Step 3** | Enter your information into the required fields of the **Your Information** page.  Select **Next** to continue the Identity Verification process.  Enter your information on Your Information page and click Next |
| **Step 4** | Depending on the information you provided, the **Verify Identity** page may be displayed. You will be required to answer several questions about information that may be in your personal records. Please answer the questions to the best of your ability.  Selectthe **Next** button to submit the request. If you wish to terminate the request, select **Cancel** to return to the **View and Manage My Access** page.  Answer the questions on the Verify Identity Page and click next |
| **Step 5** | After submitting the request, the Identity Verification confirmation will be displayed. Select the **Next** button to continue with the role request process.  *Note: If the role auto-approves, the role is granted; log out and log back in to access it.*  Click Next on the Complete Step Up Page |

## Identity Cannot Be Verified

If you receive an error message that your identity cannot be verified, it may simply mean that the information you provided could not be matched with the information available in the electronic records used for verification. You may need to take some additional steps to verify your identity.

Please follow the steps below.

| **Step** | **Action** |
| --- | --- |
| **Step 1** | Check your personal information before trying again to register with the system. |
| **Step 2** | If you have entered the correct information and still cannot be verified, you will be instructed to call the Experian Help Desk and provide the **Review Reference Number** displayed on the screen so the help desk representative can help you verify your identity. Experian is the contractor CMS uses to complete the Identity Verification process.  Call the Experian Help Desk at (866) 578-5409 and provide the Review Reference Number displayed on the screen so the help desk representative can help you verify your identity. |
| **Step 3** | After you have contacted Experian login to CMS Enterprise Portal and proceed again through Role Request process (see [How to Request a Role](#_How_to_Request) for the steps). |
| **Step 4** | On the **Your Information** screen, select the check box if you have contacted Experian and completed the identity verification process over the phone with the Experian Support personnel.  *Note: Selecting this checkbox will instruct the system to retrieve your identity verification results from Experian based on the phone verification process. You do have the option of not selecting the checkbox and continuing as you did in your original attempt of Identity Verification, prior to contacting Experian.*  Enter your information in the required fields.  On the Your Information screen check the box in the blue field at the top. |
| **Step 5** | If your identity cannot not be verified by Experian, please contact your Application Help Desk for the next steps.  *Note: Depending on the type of role you requested, you may not be granted the role you requested until you have successfully undergone ID proofing.* |

## How to Request a Role

The following are the basic step-by-step instructions on how to request access to an application and a role, when you currently do not have a role in the application.

* ASETT
* ASP
* EPPE
* ESD
* FFM/Training– Agents/Brokers/Assisters
* IC
* IDHD
* MACPro
* MCU
* MLMS
* Open Payments
* SHIM
* T-MSIS
* zONE

To request a role for all other applications, please follow these steps:

| **Step** | **Action** |
| --- | --- |
| **Step 1** | Navigate to [https://portal.cms.gov](https://portal.cms.gov/). The **CMS Enterprise Portal** page is displayed, as illustrated below.  CMS Enterprise Portal Page |
| **Step 2** | Select Login to CMS Secure Portal.  Select Login to CMS Secure Portal |
| **Step 3** | Read the **Terms and Conditions** and select **I Accept** to continue.  Read the Terms and Conditions and select I Accept to continue. |
| **Step 4** | Enter your **User ID** and select **Next** to continue.  Enter your User ID and select Next to continue. |
| **Step 5** | Enter your **Password** and select **Log In**.  Enter your Password and select Log In. |
| **Step 6** | After logging in, the **Welcome to CMS Enterprise Portal** page is displayed.  Select the down arrow icon that appears next to your name at the top of page. Then, select **My Access** from the drop-down menu to continue.  Alternately, you may select **Request Access Now** to continue.  Displays the top right corner of the CMS Enterprise Portal page with an arrow pointing to the drop down menu down arrow icon, another arrow pointing to the My Access option in the drop down menu, and another arrow pointing to the Request Access Now button, that can be selected as an alternative option.  The application **Access Catalog** is displayed  Application Access Catalog |
| **Step 7** | Scroll down to locate the application you need.  Alternatively, enter the first few letters of the application in the **Search** section and all of the applications beginning with those letters will be displayed.  *Note: If you currently have access to one or more applications, those applications are displayed in the* ***My Access*** *section. If you have pending requests, they are displayed in the* ***My Pending Requests*** *section.*  The Access Catalog, My Access and My Pending Requests sections are displayed and there is an arrow pointing to the Show All search field at the top of the My Access Catalog section and an arrow pointing to the browser's scroll bar as an alternative navigational option. |
| **Step 8** | After entering the first few letters of the application in **Search**, the applications beginning with those letters are displayed.  After entering the first few letters of the application in Search, the applications beginning with those letters are displayed. |
| **Step 9** | Select **Request Access** for the application you need.  In the example below, we will select **Request Access** for the CSR (Community Based Organization/Customer Service) application.  The applications meeting the search criteria are displayed in the Access Catalog section. There is an arrow pointing to the Request Access button for the CSR application. |
| **Step 10** | The Application Description and Select a role sections are displayed.  Select the role you need from the **Select a role** drop-down menu.  In the example below, we will select **User**.  The Application Description and Select a role sections are displayed on the Request New Application Access page. There is an arrow pointing to the Select a role drop down menu, where the role being requested has to be selected to continue. |
| **Step 11** | After selecting a role, the **Request New Application Access** page is displayed.  If all of your required business contact information is not on file, you will have to provide this information before you can continue.  Required fields are marked with an asterisk (\*) and an error message will be displayed, if the information has not been entered or selected correctly, or is entered in the wrong format.  *Note: If all of your business contact information is on file, the* ***“Please update your profile…”*** *message will not be displayed and the* ***Select a role*** *drop-down menu will be displayed for you to continue.*  *If the* ***“Please update your profile…”*** *message is displayed, enter the required information and then select* ***Next****.*  The Request New Application Page is displayed and the following required Business Contact Information fields, Company Name, Address, City, State / Territory, Zip Code, Company Phone Number, and Office Phone Number are displayed. There is also an arrow pointing to the Next buttion that has to be selected after all of the required information has been provided. |
| **Step 12** | After providing your business contact information, EIDM may ask you to provide some additional information that is required for your application and the role you have selected.  Provideany additional information that is requested, enter a reason for the request in the **Reason for Request** box and then select **Submit**.  What you may need before you begin  In the example below, we have selected the CSR application and the **User** role. EIDM also needs to know the Call Center. We will select 22nd Avenue, Phoenix, AZ from the list of Call Centers and then select the single right arrow icon. This will move the 22nd Avenue, Phoenix, AZ Call Center to the Selected Call Center(s) box.  We will then enter the reason for the request in the **Reason for Request** box and select **Submit** to continue the process.  After an application and a role is selected, the page will display additional items that need to be provided. In this example, there is an arrow pointing to the "22nd Avenue Phoenix Arizona" call center option that has been selected, "Needed for the role" message that has been entered for the Reason for Request, and an arrow pointing to the Submit button to continue. |
| **Step 13** | After selecting Submit, the **Request New Application Access Review** page is displayed.  Review the information displayed. Select **Edit** to modify the information.  Select **Submit** to submit the request for approval.  *Note: You may select* ***Cancel*** *to exit out of the Request New Application Access process. New information or changes entered will not be saved.*  In the example below, the information is correct. We will select **Submit** to submit the request for approval.  The Request New Application Access Review page and all of the current business contact information and role attributes selected are displayed for review and there is an arrow pointing to the Submit button to continue. |
| **Step 14** | After selecting Submit, the **Request New Application Access Acknowledgement** page is displayed.  The acknowledgement page displays the tracking number for the request and informs you that you will receive an E-mail when the request has been processed.  *Note: If you have submitted a request for a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to change your password and create and enter an 8-character password the next time you log in, after your request has been approved. An 8-character password may be required for applications that use RACF IDs.*  Select **OK** to close the acknowledgment page.  On the Request New Application Access acknowledgement page, the message your request has been successfully submitted, the tracking number, and a button pointing to the OK button to exit the page are displayed. |