CMS IDENTITY MANAGEMENT (IDM) USER ACCOUNT REGISTRATION

1. 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 IDM?

CMS has established an Identity Management (IDM) 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.
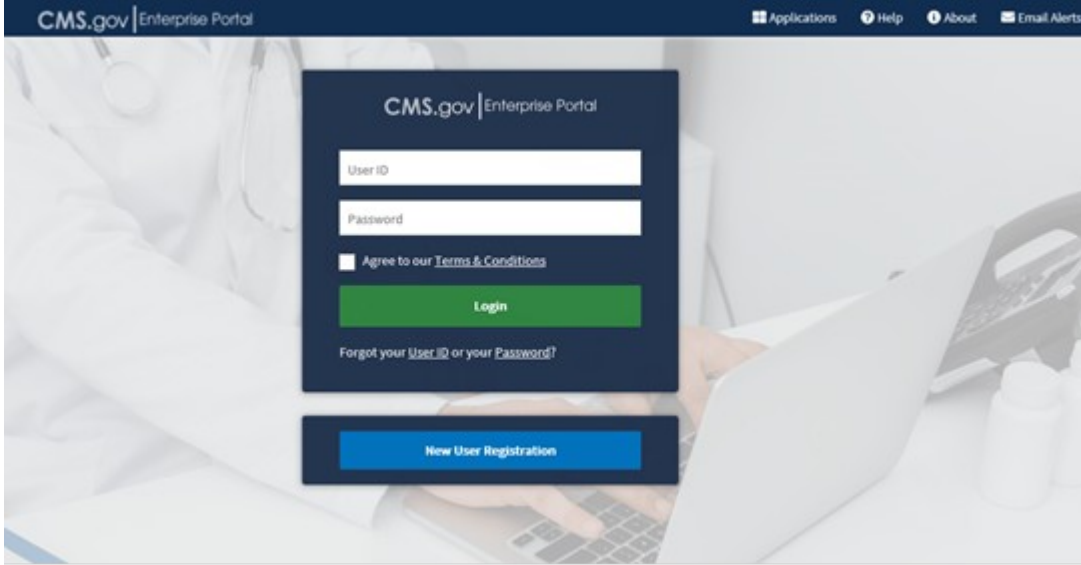
2. User Instructions

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.
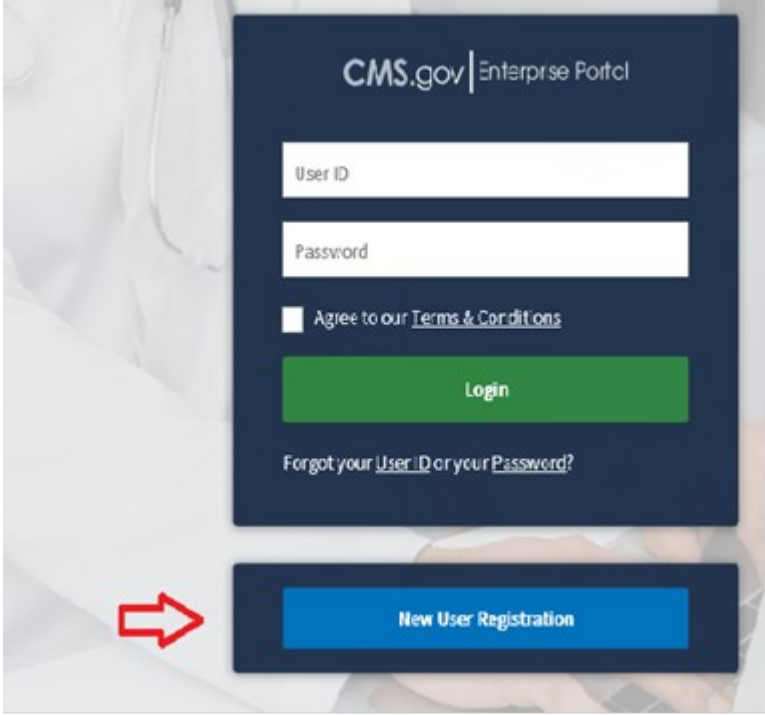
Step	Action
Step 1	Navigate to https://portal.cms.gov. The **CMS Enterprise Portal** page is displayed, as illustrated below.
Step 2	Select the New User Registration link.

Step	Action
Step 3	Select your application from the dropdown. Read the **Terms and Conditions**, select **I agree to the terms and conditions**, and then select **Next** to continue with the registration process. **Step #1: Select Your Application** Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions. Open Payments: Physician Payments Sunshine Act **Terms & Conditions** OMB No.0938-1236	Expiration Date: 03/31/2021	Paperwork Reduction Act **Consent to Monitoring** By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the HHS Rules of Behavior. ☑ I agree to the Terms & Conditions Next Cancel

Step	Action
Step 4	The **Your Information** page is displayed.

Provide the 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.*

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.
All fields are required unless marked (optional).

Enter First Name | Enter Middle Name (optional) | Enter Last Name | Suffix (optional)

Birth Month | Birth Date | Birth Year

Is Your Address U.S. Based?
○ Yes ○ No

Enter Home Address Line 1 | Enter Home Address Line 2 (optional)

Enter City | Select State | Enter ZIP Code | Enter ZIP+4 (optional)

Enter Email Address | Confirm Email Address

Enter Phone Number

Back | Next | Cancel |

Step	Action
Step 5	After providing the required information on the **Your Information** page, the **Create User ID, Password & Security Question/Answer** page is displayed. Create and enter a user ID of your choice, based on the requirements for creating a user ID. *Note: IDM will display instructions on what you are required to include in your user ID.*
Step 6	Create and enter a password of your choice. *Note: IDM 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.*

Step	Action
Step 7	After entering the user ID and password you have created, select a question of your choice in the **Select your Security Question and Answer** section and enter the answer you want to be saved with the question. 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.* **Step #3: Create User ID, Password & Security Question/Answer** Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer. **User ID** martelloo **Password** •••••••••••• **Confirm Password** ••••••••••••• Security answer to be used in case you forget your password or you need to unlock your account. **Security Question Answer** - Can contain alphanumeric characters. - Can contain spaces. - Must be at least 4 characters. - Cannot contain: Parts of First Name, Last Name, or Passwords. - Cannot contain part of the security question. - Your Security Answer will be required in order for you to reset your password or unlock your account. **Select Your Security Question:** What was the first computer game you played? **Enter Security Answer** mario Back Next Cancel

Step	Action
Step 8	After selecting **Next**, the **New User Registration Summary** page is displayed and informs you that you will receive an E-mail acknowledging your successful registration and will include your user ID. Select **Submit User** to close the **Registration Complete** page. Please review your information and make any necessary changes before submitting. Open Payments: Physician Payments Sunshine Act All fields are required unless marked (optional). First Name: Robert	Enter Middle Name (optional)	Last Name: Allen	Suffix (optional) Birth Month: April	Birth Date: 22	Birth Year: 1979 Home Address Line 1: 9502 Piney branch Rd	Enter Home Address Line 2 (optional) City: silver spring	State: Maryland	ZIP Code: 20903	Enter ZIP+4 (optional) Email Address: martello@gmail.com	Confirm Email Address: martello@gmail.com Phone Number: 240-381-8330 User ID: martello Password: ••••••••••••	Confirm Password: •••••••••••• Select Your Security Question: What was the first computer game you played? Security Answer: mario **Submit User** Cancel ✓ **Confirmation** ✕ Your User ID has been successfully registered with CMS Enterprise Portal. An email has been sent to your registered email address. You can now login.
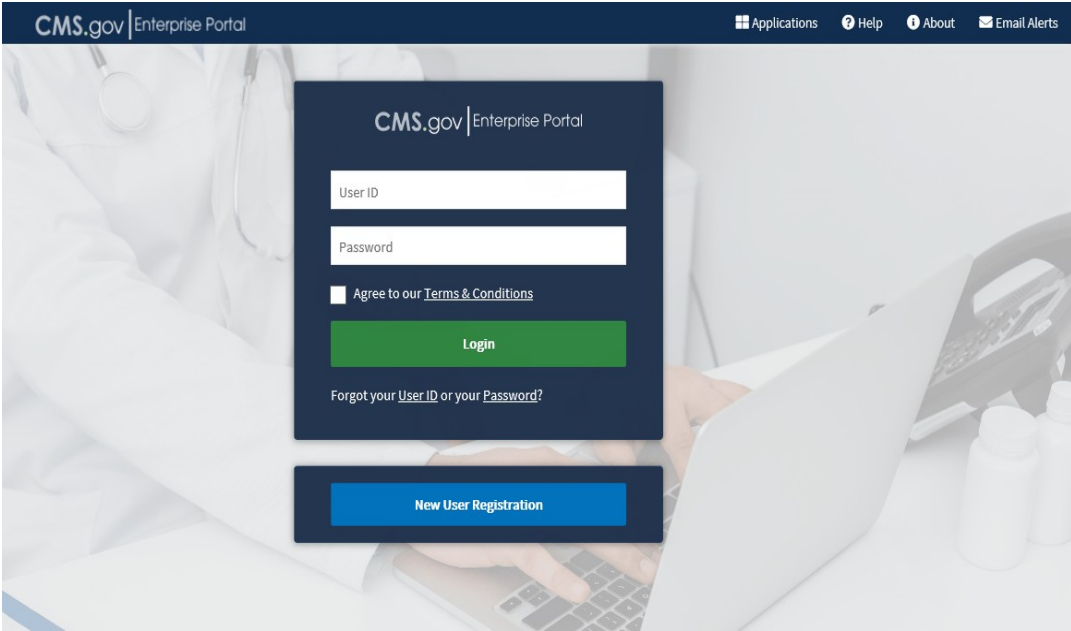
How to Login

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. The **CMS Enterprise Portal** page is displayed, as illustrated below. This
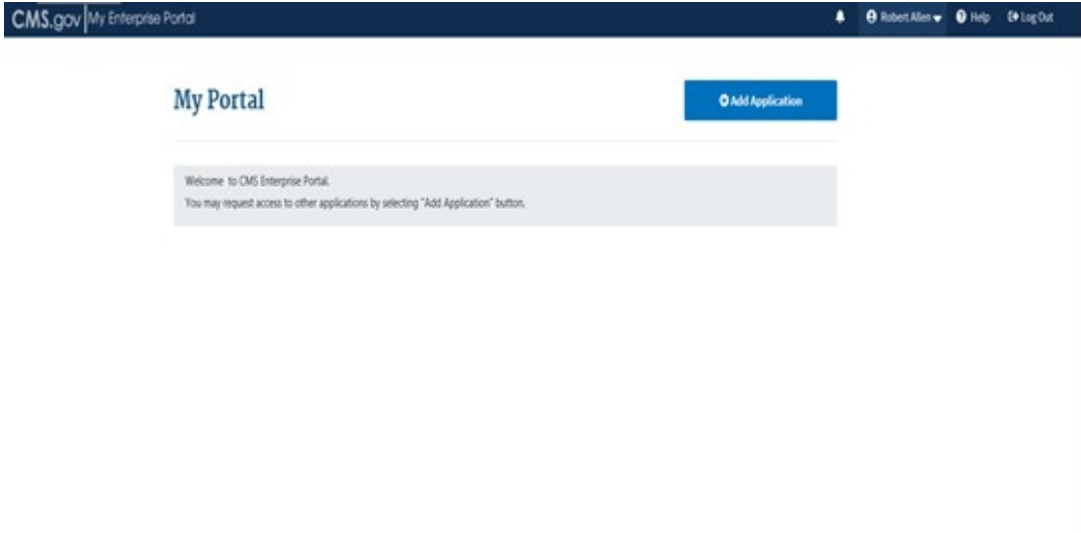
Step	Action
Step 2	Enter the UserID and Password. Read the Terms and Conditions and select I Accept to continue and then select Login.

Step	Action
Step 3	After logging in, the **Welcome to CMS Enterprise Portal** page is displayed. CMS.gov My Enterprise Portal 🔔 👤 Robert Allen ▾ ❓ Help ⬅ Log Out **My Portal** ⊕ Add Application Welcome to CMS Enterprise Portal. You may request access to other applications by selecting "Add Application" button.
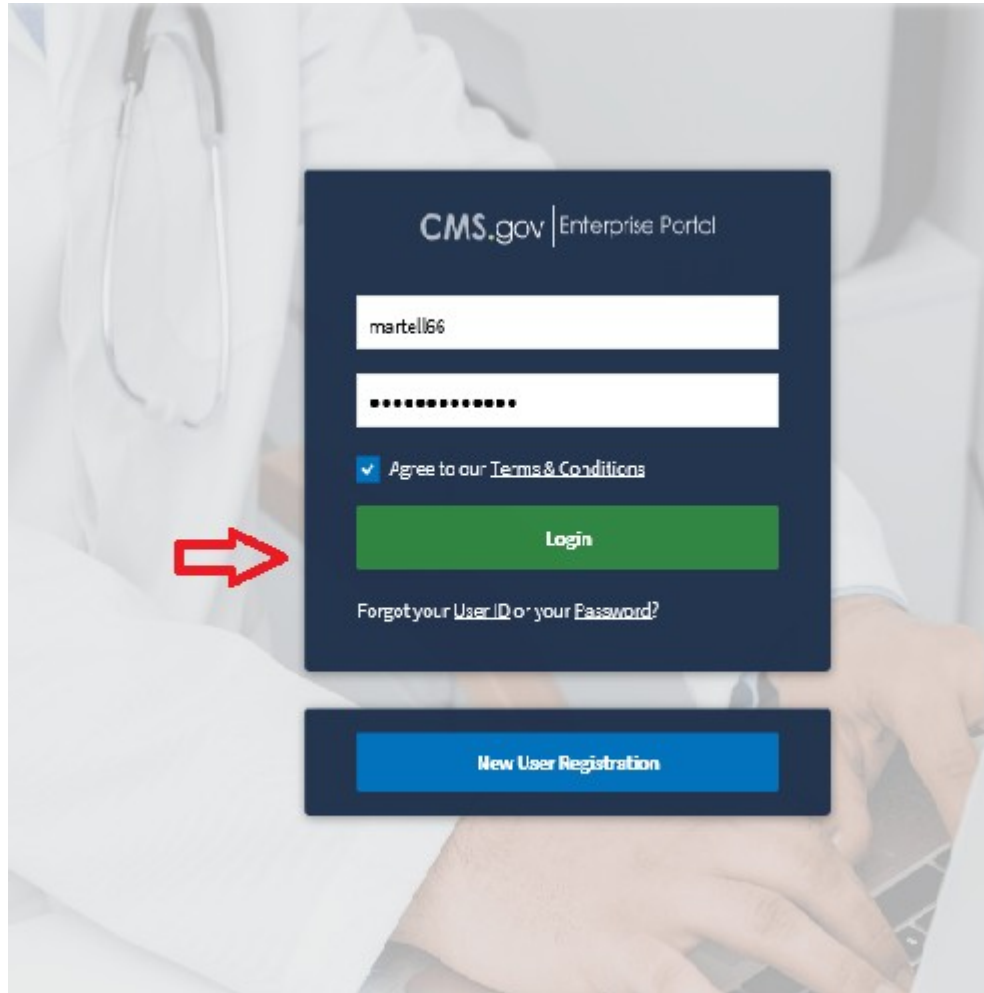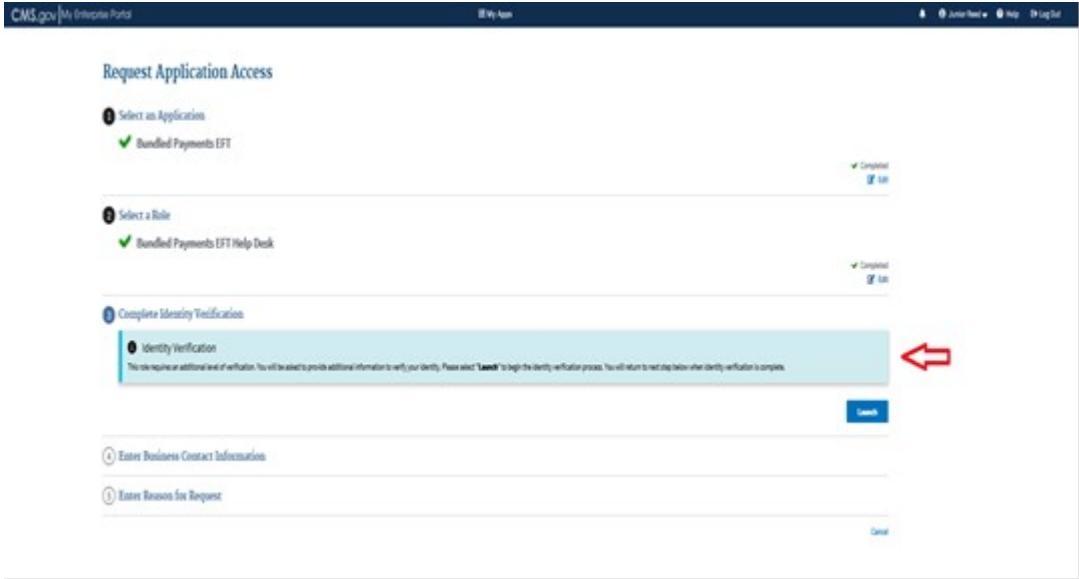
Identity Verification

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.
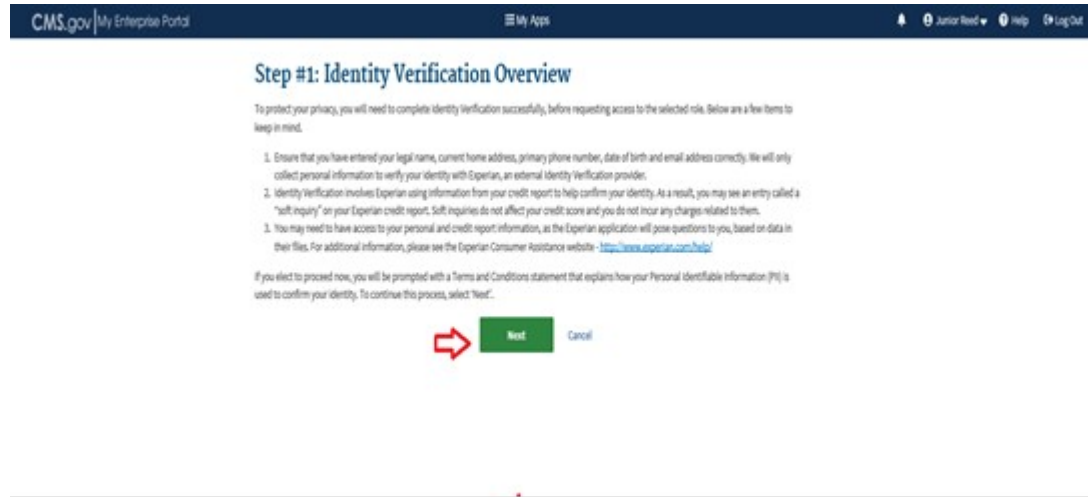
To begin the Identity Verification process, follow these steps:

Step	Action
Step 1	If you select a role that requires identity verification, you will first be directed to the **Identity Verification** page. Select **Launch**, to begin the Identity Verification process.

Step	Action
	The Identity Verification Overview page is displayed, click next to continue...
Step 2	Read the 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.

Step	Action
Step 3	Enter your information into the required fields of the **Your Information** page. Confirm that you have read and agreed to the information Select **Next** to continue the Identity Verification process.

Step	Action
	Depending on the information you provided, the **Verify Your 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.

Select the **Next** button to submit the request. If you wish to terminate the request, select **Cancel.** |
| **Step 4** | |

Step	Action
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.* **Step #4: Verify Your Identity** ✔ Confirmation ✕ You have successfully completed the Remote Identity Proofing process. Next

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. ✖ Error X We were unable to verify the information that you have provided. Please contact Experian Verification Support Services at 1-866-578-5409, and provide the Review Reference Number - L350984117. To request access to an application please log into the CMS Portal after getting with the Experian Support Services. Enter your legal first name and last name, as it may be required for Identity Verification.

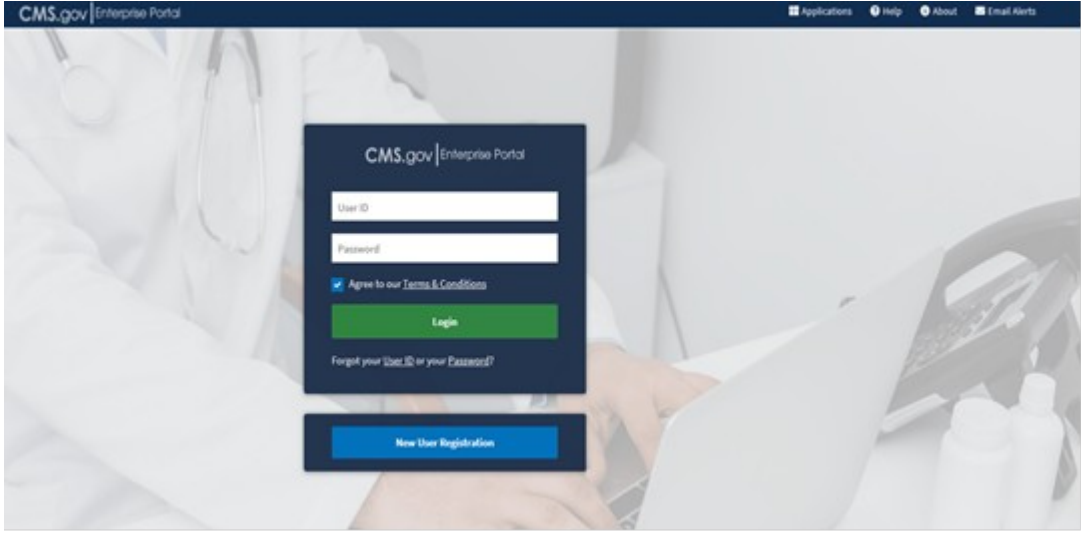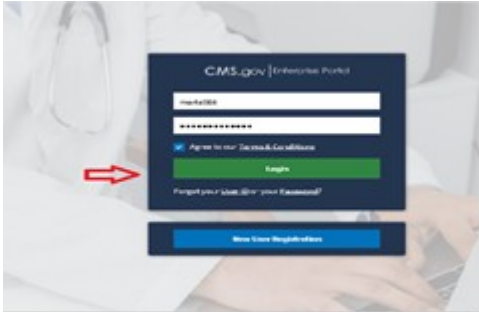| Step	Action
Step 3	After you have contacted Experian login to CMS Enterprise Portal and proceed again through Role Request process (see <u>How to Request a Role</u> <u>Error: Reference source not found</u>for the steps).
Step 4	On the **Your Information** screen, select the check box if you have contacted 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. ![Your Information screen showing checkbox for Experian Verification Support Services] Please select the checkbox, if you have contacted the Experian Verification Support Services. **Your Information** Enter your legal first name and last name, as it may be required for Identity Verification. · First Name CARMELLA Middle Name
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.
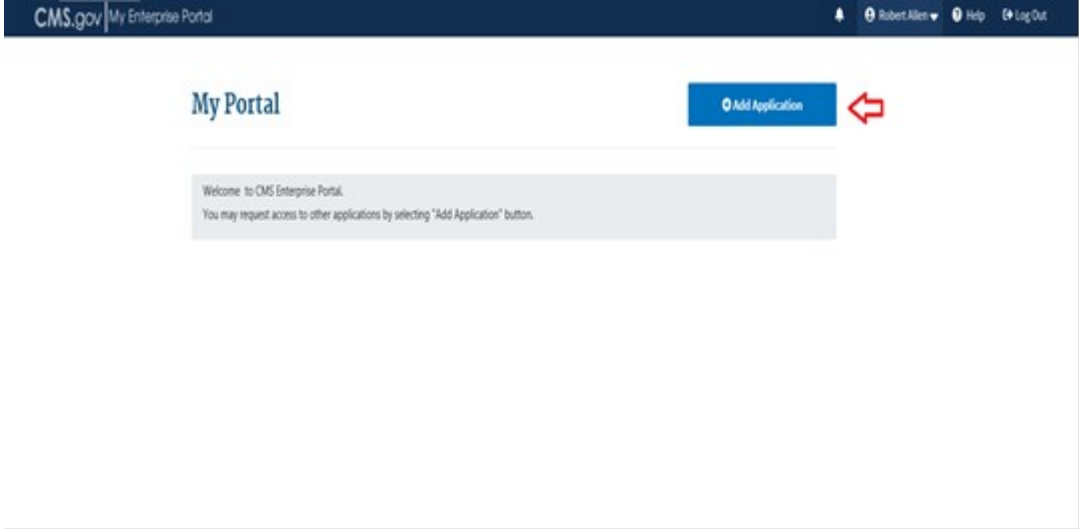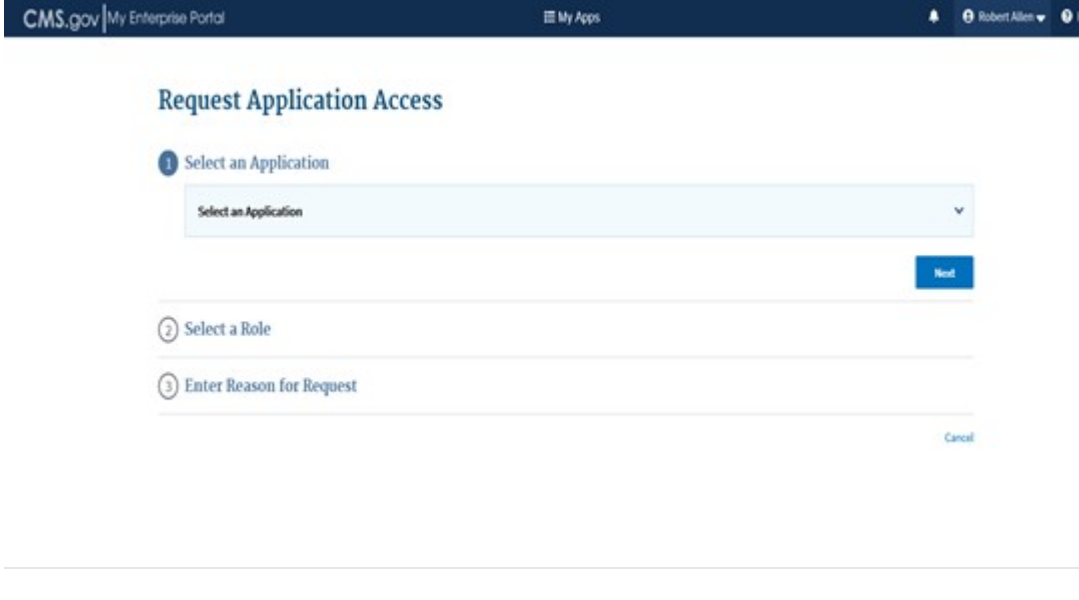
- ASETT
- ASP
- EPPE
- ESD
- FFM/Training– Agents/Brokers/Assisters
- IC
- IDHD

- 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. The **CMS Enterprise Portal** page is displayed, as illustrated below.
Step 2	Enter the UserID and Password. Read the Terms and Conditions and select I Accept to continue and then select Login.

Step	Action
Step 3	After logging in, the **Welcome to CMS Enterprise Portal** page is displayed.
	You may request access to applications by selecting "Add Application" button.
	The Request Application Access page is displayed
Step 4	Locate the application from the drop down list and select next.
	In the example below, we will select Bundled payments
	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.

Step	Action
Step 5	Select a role and click next . In the example below, we will selected Help Desk

Step	Action
Step 6	Enter the Business Contact Information and click next
Step 7	Provide the reason for your request and click submit.
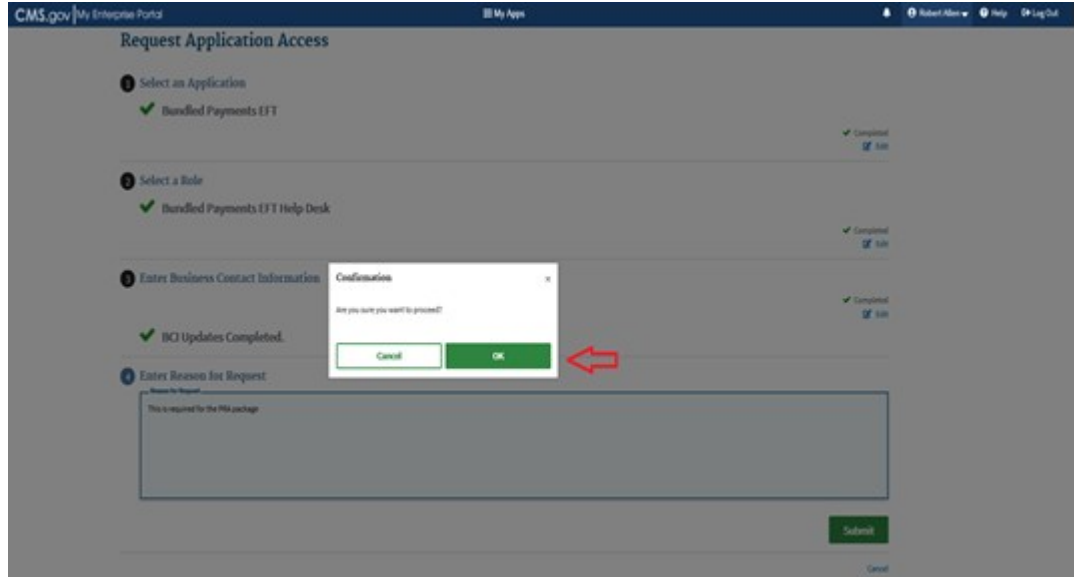
Step	Action
Step 8	Click Ok
Step 9	After selecting Submit, the **Request New Application Access Acknowledgement** page is displayed. The acknowledgement page displays the tracking number for the request and informs you that you will receive an E-mail when the request has been processed. Select **OK** to close the acknowledgment page.