

**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

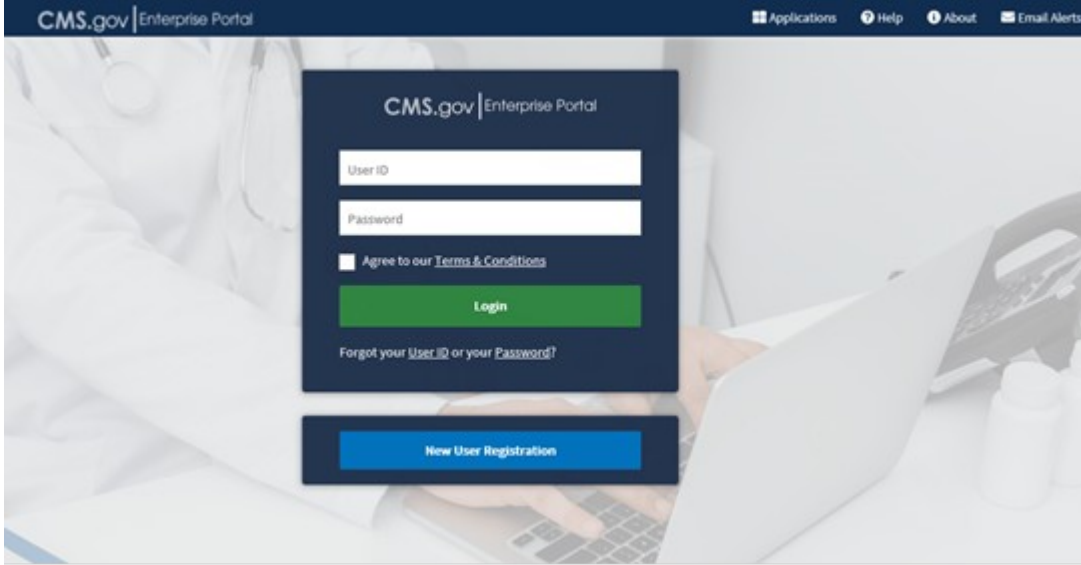
How to Register and Create a User ID and Password

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**

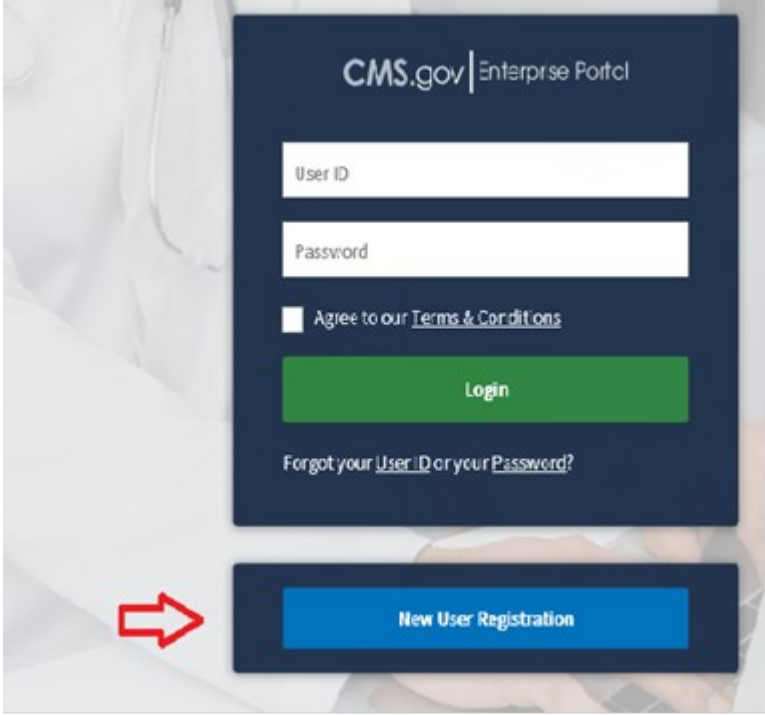
Step 1

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

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 3

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



Step

Action

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 4

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

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 5

User ID Requirements

- Must be between 5 and 100 characters and contain at least 1 letter.
- Can contain alphanumeric characters.
- Allowed special characters are limited to hyphens (-), underscores (_), apostrophes ('), and periods (.)
- The @ symbol is allowed only if the User ID is in a valid email address format (j.doe@abc.edu or 123@abc.com).
- Cannot contain 8 consecutive numbers.
- Cannot begin or end with special characters.
- Cannot contain more than 1 consecutive special character.

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: marf666 X

Enter Password (bordered in red)

Confirm Password

Password is a required field.

Security answer to be used in case you forget your password or you need to unlock your account.

Select Your Security Question

Enter Security Answer

Back Next Cancel

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 6

Password Requirements

- Your Password must be changed every 90 days.
- Password must be a minimum of 8 characters.
- Password must contain: 1 upper case and 1 lower case letter, 1 number, and 1 special character.
- The following special characters may not be used: ! @ # \$ % ^ & * () ~ / \ | & (space).
- Password cannot contain: Parts of User ID, First Name, Last Name, common passwords.
- Password can only be changed once every 24 hours.
- Password must be different from last 24 passwords.

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: marf666

Password: *****

Confirm Password (bordered in red)

Confirm Password is a required field.

Security answer to be used in case you forget your password or you need to unlock your account.

Select Your Security Question

Enter Security Answer

Back Next Cancel

Step

Action

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 7

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
marfelles

Password

Confirm Password

Security answer to be used in case you forget your password or you need to unlock your account.

Select Your Security Question:
What was the first computer game you played?

Enter Security Answer
maria

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 unblock your account.

Back Next Cancel

Step

Action

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.

Step 8

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)
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Birth Month April	Birth Date 22	Birth Year 1979
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Home Address Line 1 8502 Piney branch Rd	Enter Home Address Line 2 (optional)
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
City silver spring	State Maryland	ZIP Code 20903	Enter ZIP+4 (optional)
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Email Address marle00@gmail.com	Confirm Email Address marle00@gmail.com
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Phone Number
240-381-8330

User ID marle000	
Password *****	Confirm Password *****
Select Your Security Question: What was the first computer game you played?	
Security Answer mario	



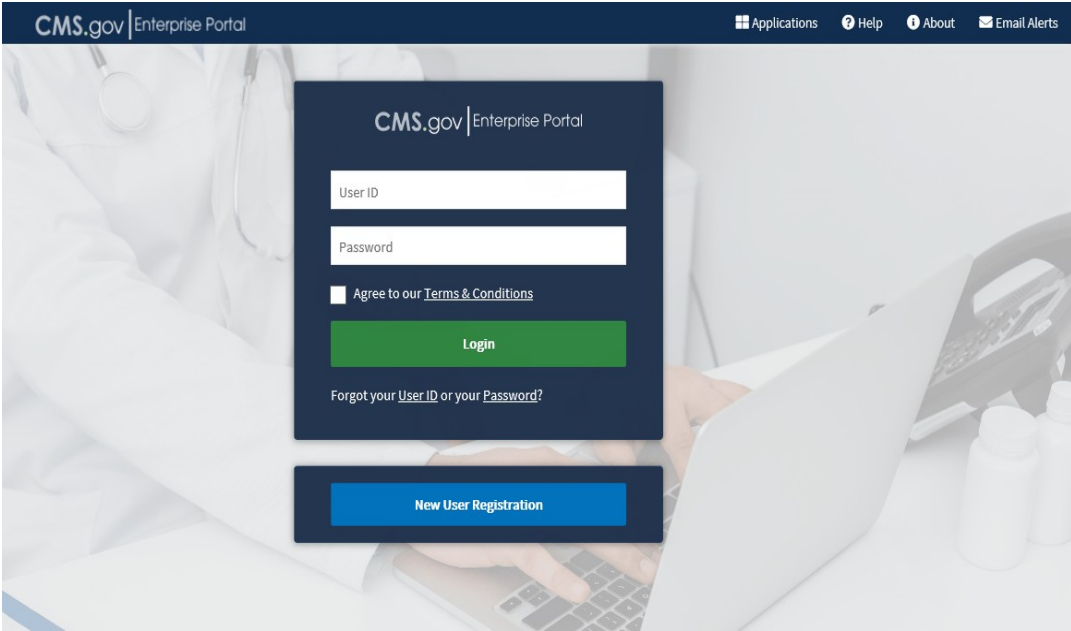
 **Confirmation** x

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.

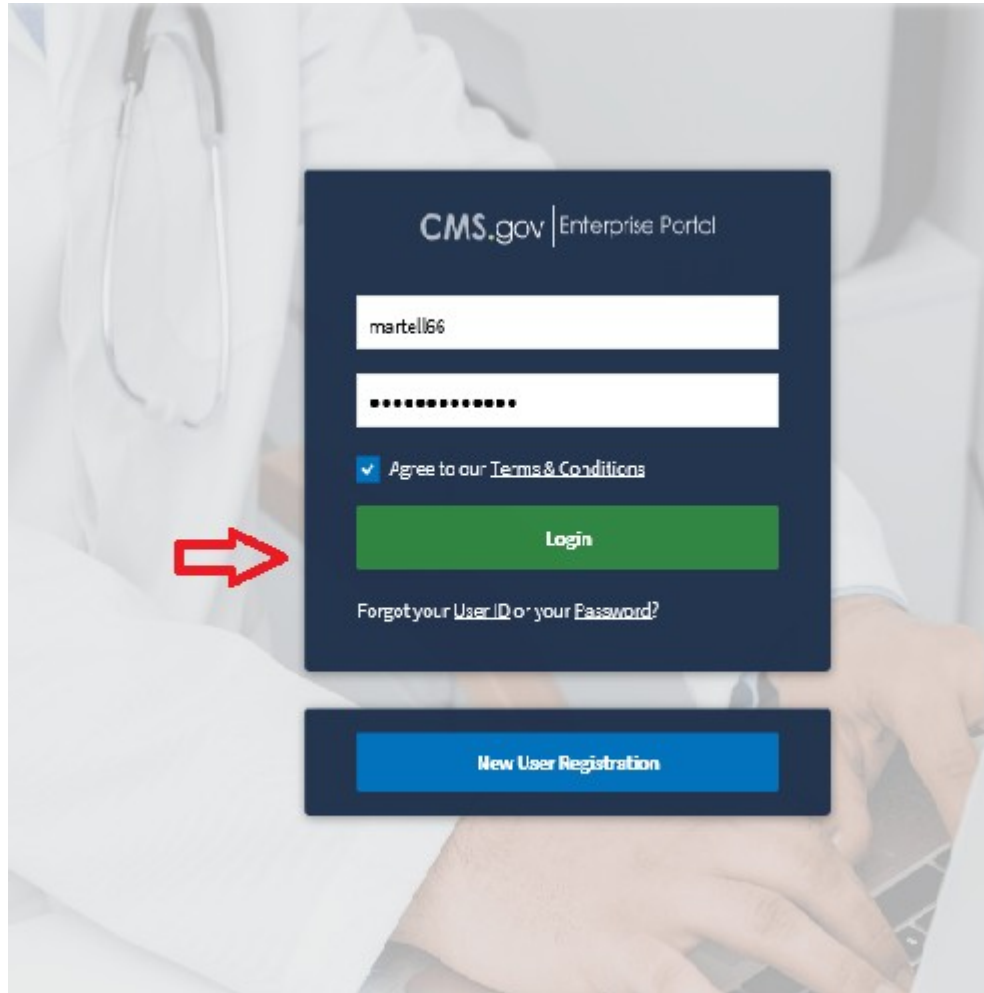
Step	Action
Step 1	<p>Navigate to https://portal.cms.gov. The CMS Enterprise Portal page is displayed, as illustrated below.</p> <p style="text-align: center;">This</p> 

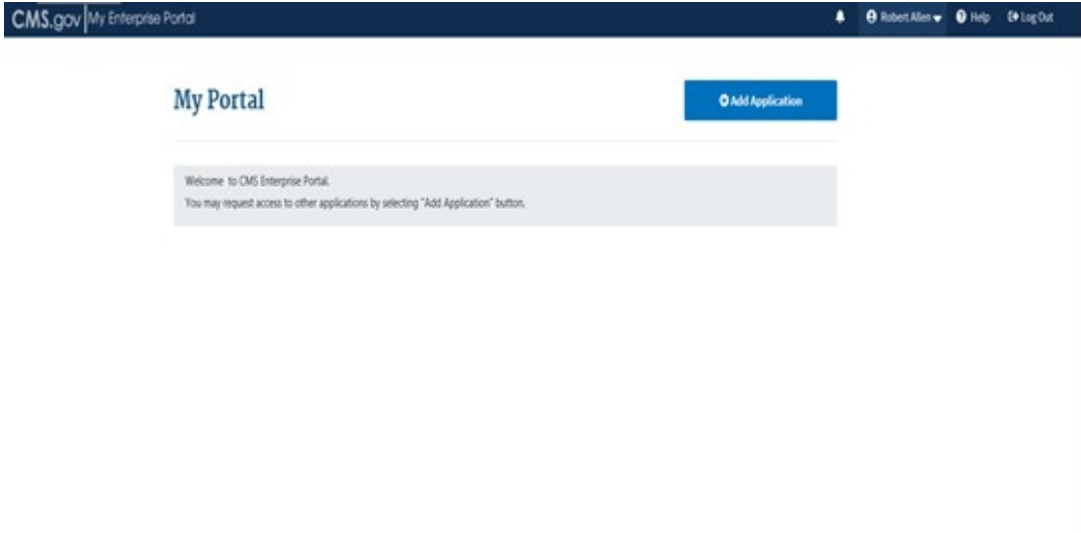
Step

Action

Enter the UserID and Password. Read the Terms and Conditions and select I Accept to continue and then select Login.

Step 2



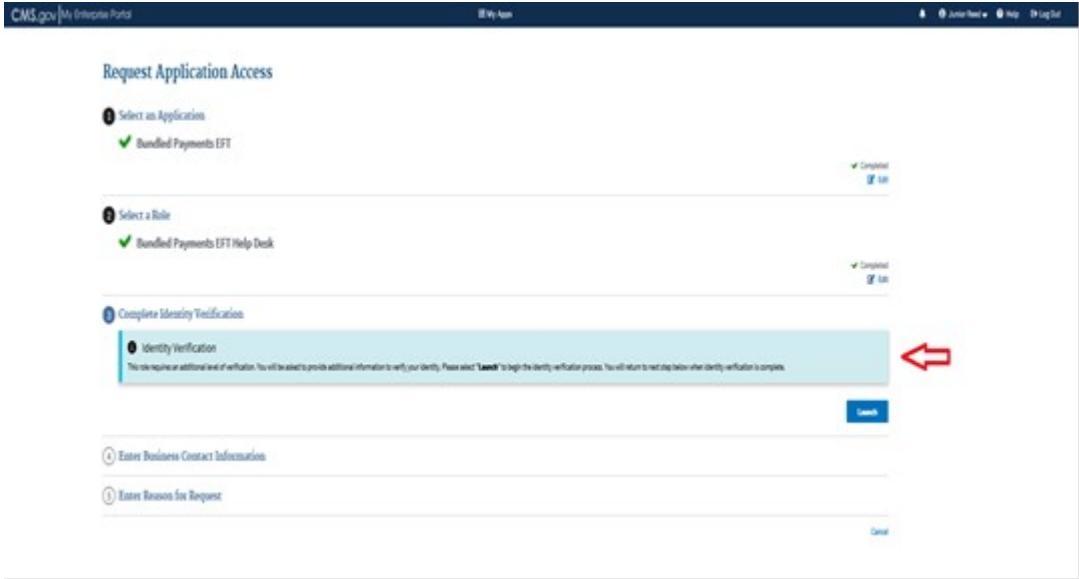
Step	Action
Step 3	<p>After logging in, the Welcome to CMS Enterprise Portal page is displayed.</p> 

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.

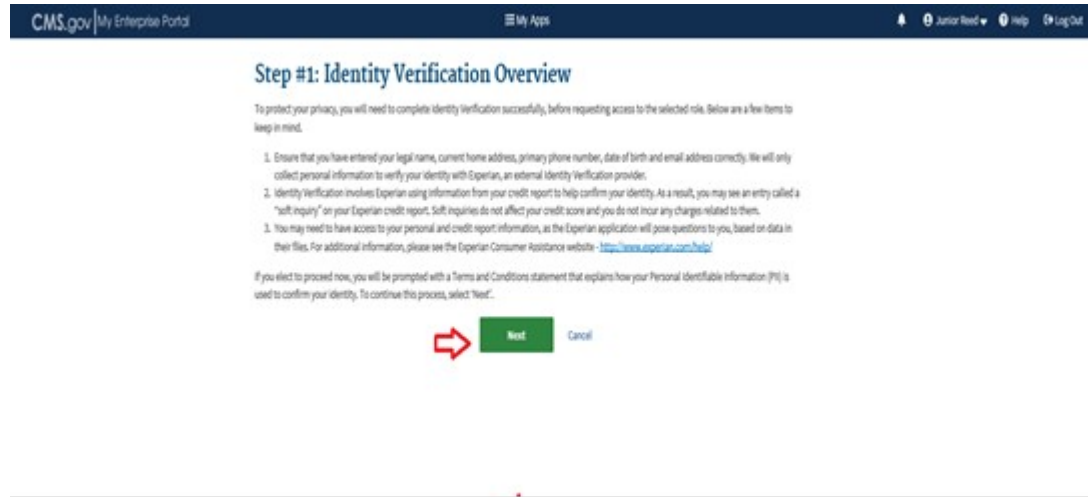
To begin the Identity Verification process, follow these steps:

Step	Action
Step 1	<p>If you select a role that requires identity verification, you will first be directed to the Identity Verification page.</p> <p>Select Launch, to begin the Identity Verification process.</p>  <p>The screenshot shows a web interface titled "Request Application Access" with a dark blue header. The main content area is white and contains a list of steps: 1. Select an Application (Bundled Payments EFT), 2. Select a Role (Bundled Payments EFT Help Desk), 3. Complete Identity Verification (Identity Verification), 4. Enter Business Contract Information, and 5. Enter Reason for Request. The "Identity Verification" step is highlighted in light blue, and a red arrow points to a "Launch" button at the bottom right of this step. The "Completed" status is shown for the first two steps.</p>

Step

Action

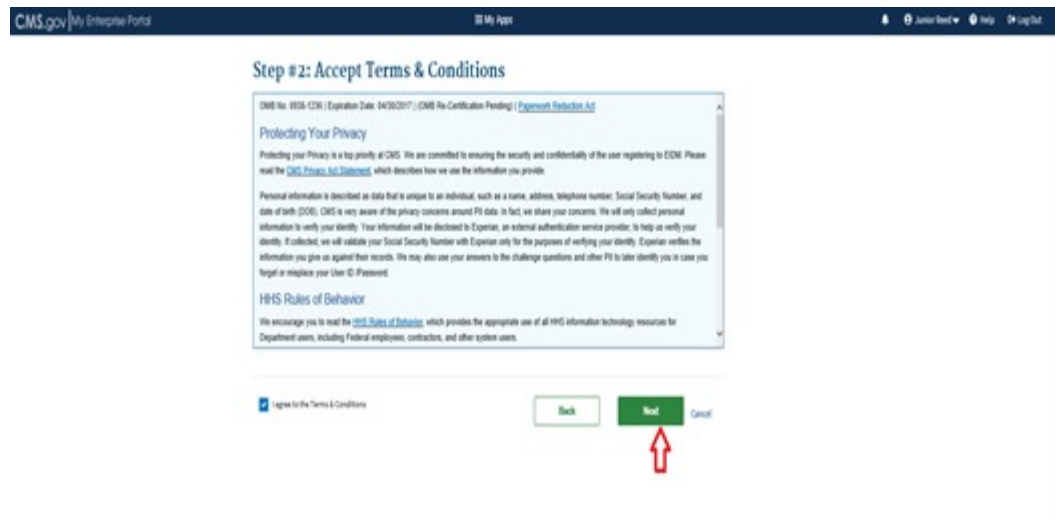
The Identity Verification Overview page is displayed, click next to continue...



The screenshot shows the 'Step #1: Identity Verification Overview' page. At the top, there is a navigation bar with 'CMS.gov My Enterprise Portal', 'My Apps', and user information 'Junior Reed'. The main content area has a heading 'Step #1: Identity Verification Overview' followed by a paragraph: 'To protect your privacy, you will need to complete identity verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.' Below this are three numbered instructions: 1. Ensure that you have entered your legal name, current home address, primary phone number, date of birth and email address correctly. We will only collect personal information to verify your identity with Experian, an external identity verification provider. 2. Identity verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them. 3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website - <http://www.experian.com/help/>. Below the instructions is a paragraph: 'If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select "Next".' At the bottom, there are two buttons: 'Next' (highlighted with a red arrow) and 'Cancel'.

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.



The screenshot shows the 'Step #2: Accept Terms & Conditions' page. At the top, there is a navigation bar with 'CMS.gov My Enterprise Portal', 'My Apps', and user information 'Junior Reed'. The main content area has a heading 'Step #2: Accept Terms & Conditions'. Below the heading is a scrollable box containing the following text: 'DME No. W09-ICM | Expiration Date: 04/30/2017 | DME Re-Certification Pending | [Openwork Provider App](#)' followed by 'Protecting Your Privacy'. The 'Protecting Your Privacy' section states: 'Protecting your privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EDN. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide. Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider. To help us verify your identity, if collected, we will validate your Social Security Number with Experian only for the purpose of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or replace your User ID Password.' Below this is the 'HHS Rules of Behavior' section: 'We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.' At the bottom, there is a checkbox labeled 'I agree to the Terms & Conditions' which is checked. To the right of the checkbox are three buttons: 'Back', 'Next' (highlighted with a red arrow), and 'Cancel'.

Step

Action

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 3

The screenshot shows the 'Step #3: Enter Your Information' page in the CMS.gov Enterprise Portal. The page title is 'Step #3: Enter Your Information' and the subtitle is 'Enter your legal first name and last name, as it may be required for identity verification. All fields are required unless marked *optional*.' The form contains the following fields: First Name (jane), Middle Name (optional) (empty), Last Name (Jane), Suffix (optional) (empty), Enter Social Security Number (with a help icon), Date of Birth (April 28, 2000), Is Your Address US Based? (Yes selected), Home Address Line 1 (123 Main St), Home Address Line 2 (optional) (empty), City (jane), State (Maryland), ZIP Code (20000), ZIP Code (optional) (empty), Phone Number (2405551234), Email Address (jane.doe@cms.mta.gov), and Confirm Email Address (jane.doe@cms.mta.gov). At the bottom, there is a checkbox for 'Check here if you have read and verified the information above is accurate and complete as required by identity verification.' Below the checkbox are three buttons: 'Back', 'Next', and 'Cancel'. A red arrow points to the 'Next' button.

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

My Apps

Step #4: Verify Your Identity

1. You may have opened an auto loan in or around February 2018. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

- GMAC
- WELLS FARGO BANK
- CHRYSLER CREDIT
- BMW FINANCIAL SERVICES
- NONE OF THE ABOVE/DOES NOT APPLY

2. You may have opened a student loan in or around February 2016. Please select the lender that you have previously or you are currently making payments to. If you have not received student loans with any of these lenders now or in the past, please select 'NONE OF THE ABOVE/DOES NOT APPLY'.

- GLHEC STUDENT LOAN
- MARINE MIDLAND
- STUDENT LOAN MKT ASSN
- HERITAGE FEDERAL BK
- NONE OF THE ABOVE/DOES NOT APPLY

3. Please select the term of your auto loan (in months) from the following choices. If your auto loan or auto lease term is not one of the choices please select 'NONE OF THE ABOVE'.

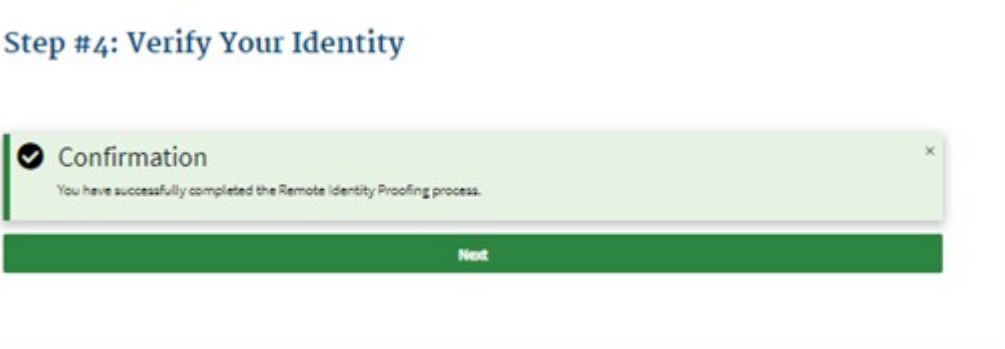
- 24
- 36
- 48
- 60
- NONE OF THE ABOVE/DOES NOT APPLY

4. You may have opened a (MISC. NAHL CR. CARDS/A) credit card. Please select the year in which your account was opened.

- 2012
- 2014
- 2016
- 2018
- NONE OF THE ABOVE/DOES NOT APPLY

5. You may have opened a Home Equity Line of Credit type loan in or around April 2018. Please select the lender to whom you currently make your payments or made your payments.

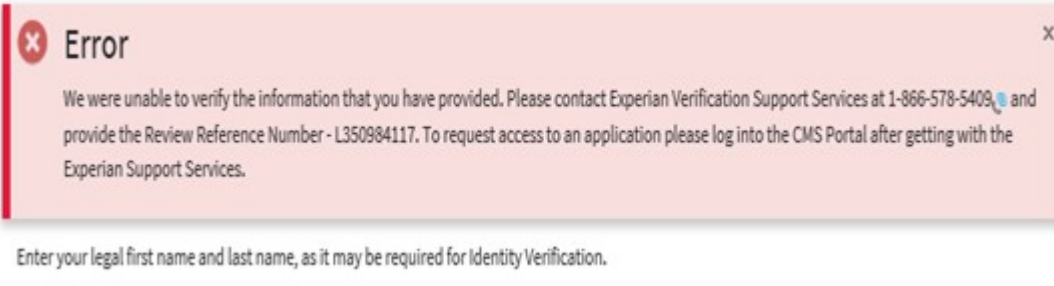
- INLAND MORTGAGE
- CHAMPION MORT
- FIRST OF AMERICA BK
- CALIFORNIA FEDERAL
- NONE OF THE ABOVE/DOES NOT APPLY


Step	Action
Step 5	<p>After submitting the request, the Identity Verification confirmation will be displayed. Select the Next button to continue with the role request process.</p> <p><i>Note: If the role auto-approves, the role is granted; log out and log back in to access it.</i></p> 

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	<p>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.</p> 

Step	Action
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 Error: Reference source not found for the steps).
Step 4	<p>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.</p> <p><i>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.</i></p> <p>Enter your information in the required fields.</p>  <p>The screenshot shows a form titled 'Your Information'. At the top, there is a checkbox with the text 'Please select the checkbox, if you have contacted the Experian Verification Support Services.' which is checked. A blue arrow points to this checkbox. Below the checkbox, there are two input fields: 'First Name' with the value 'CARMELLA' and 'Middle Name' which is empty. The form also includes instructions: 'Enter your legal first name and last name, as it may be required for Identity Verification.'</p>
Step 5	<p>If your identity cannot not be verified by Experian, please contact your Application Help Desk for the next steps.</p> <p><i>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.</i></p>

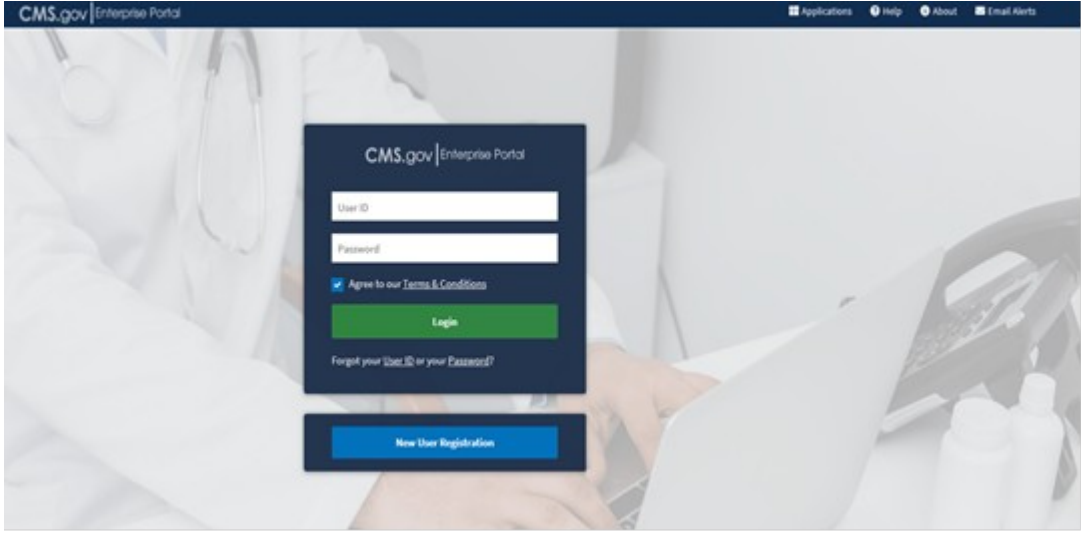
How to Request a Role

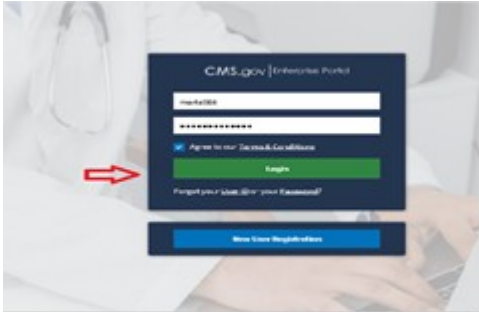
The following are the basic step-by-step instructions on how to request access to an application and a role, when you currently do not have a role in the application.

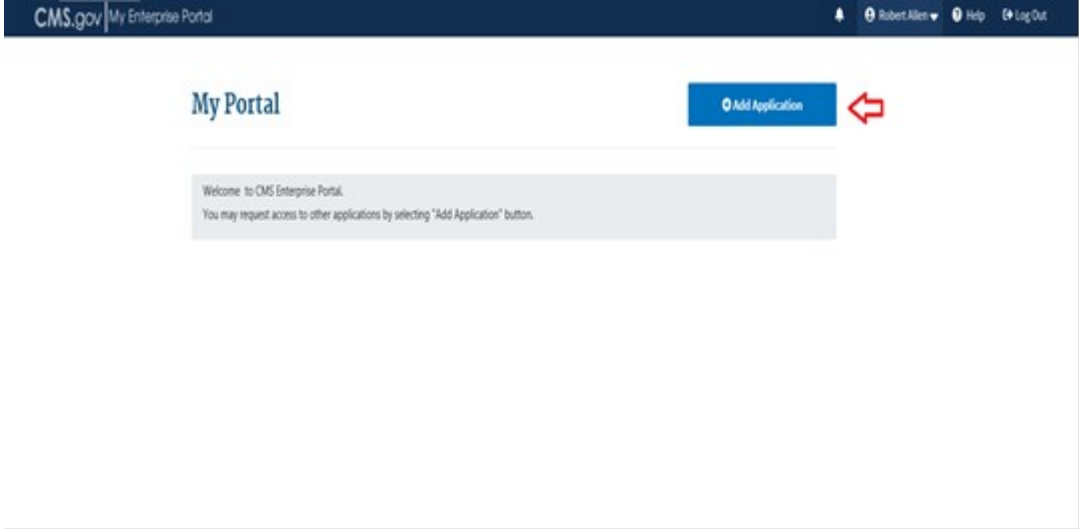
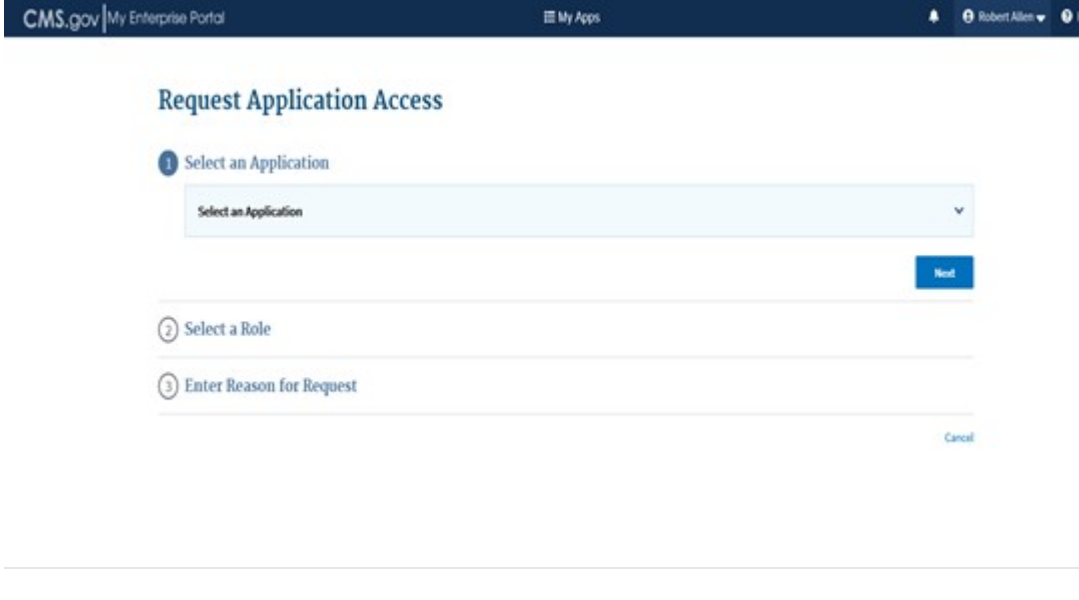
- ASETT
- ASP
- EPPE
- ESD
- FFM/Training– Agents/Brokers/Assisters
- IC
- IDHD
- MACPro
- MCU
- MLMS
- Open Payments
- SHIM
- T-MSIS
- zONE

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

Step	Action
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Step 1	<p>Navigate to https://portal.cms.gov. The CMS Enterprise Portal page is displayed, as illustrated below.</p> 
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Step 2	<p>Enter the UserID and Password. Read the Terms and Conditions and select I Accept to continue and then select Login.</p> 
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Step	Action
	<p>After logging in, the Welcome to CMS Enterprise Portal page is displayed.</p> <p>You may request access to applications by selecting "Add Application" button.</p> 
<p>Step 3</p>	<p>The Request Application Access page is displayed</p> 
<p>Step 4</p>	<p>Locate the application from the drop down list and select next.</p> <p>In the example below, we will select Bundled payments</p> <p><i>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.</i></p>

CMS.gov My Enterprise Portal My Apps Robert Allen Help Log Out

Request Application Access

1 Select an Application

Application: Bundled Payments EFT

Bundled Payments for Care Improvement Data File Transfer

Help Desk Information

Next

2 Select a Role

3 Enter Reason for Request

Cancel

Select a role and click next .

In the example below, we will selected Help Desk

Step 5

CMS.gov My Enterprise Portal My Apps Robert Allen Help Log Out

Request Application Access

1 Select an Application

Bundled Payments EFT

Completed

2 Select a Role

Role: Bundled Payments EFT Help Desk

This user's role is an authorized representative of CMS that provides help desk assistance to Bundled Payments EFT users.

Next

3 Enter Business Contact Information

4 Enter Reason for Request

Step

Action

Step 6

Enter the Business Contact Information and click next

The screenshot shows the 'Request Application Access' page. The first two steps are completed: 'Select an Application' (Bundled Payments EFT) and 'Select a Role' (Bundled Payments EFT Help Desk). The third step, 'Enter Business Contact Information', is the current active step. It contains several input fields: 'Enter Company Name', 'Enter Address Line 1', 'Enter Address Line 2', 'Enter City', 'Select State', 'Enter ZIP Code', 'Enter Company Phone Number', and 'Enter Office Phone Number'. A 'Next' button is located at the bottom right of the form, with a red arrow pointing to it.

Step 7

Provide the reason for your request and click submit.

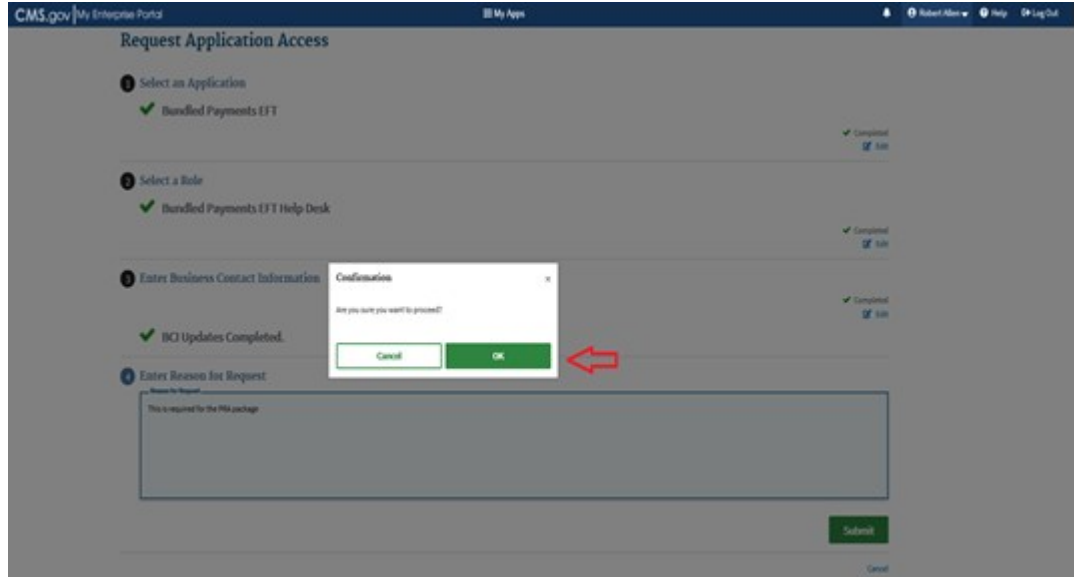
The screenshot shows the 'Request Application Access' page. The first three steps are completed: 'Select an Application' (Bundled Payments EFT), 'Select a Role' (Bundled Payments EFT Help Desk), and 'Enter Business Contact Information' (BCI Updates Completed). The fourth step, 'Enter Reason for Request', is the current active step. It features a large text area for entering the reason for the request. A 'Submit' button is located at the bottom right of the form, with a red arrow pointing to it.

Step

Action

Step 8

Click Ok



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.

Step 9

