DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services

Office of Technology Solutions

Enterprise User Administration (EUA)
Users Guide

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CONTENTS

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1.0   INTRODUCTION

This guide provides information on the Enterprise User Administration (EUA) system used by the Centers for Medicare & Medicaid Services (CMS) and the CMS Data Center (CMS DC). The guide discusses the role of EUA in User ID and password management and provides instructions for installation and operation of EUA support products available to the user.

EUA is a system used by CMS to manage enterprise User IDs and passwords. It allows for centralized administration of User IDs on the entire CMS enterprise including the mainframe systems, mid-tier devices such as AIX or Sun systems, network operating systems such as Netware or Windows, and database platforms such as Oracle, Sybase, and MS SQL. The system utilizes online data to automate the approval process for access requests and provides logging and auditing support.

EUA only manages resources resident at the CMS DC and at CMS Web sites. Therefore, it does not control Health and Human Services (HHS) provided resources such as the Integrated Time and Attendance System (ITAS) and Outlook. Users need to manage those User IDs and passwords through mechanisms provided in those environments. EUA also does not manage local IDs created in application tables. It does however notify an application maintainer whenever a user has been granted access to the maintainer's application.

2.0   USER CHANGE REQUESTS

All users may submit change requests by sending an e-mail to the CMS Access Administrator (CAA) responsible for their User IDs. The CAA will enter the request into EUA, where it will be routed to the appropriate approving authorities. Contractors must immediately notify CMS upon termination of any employees who hold CMS User IDs. Users may also submit requests for application access on their own behalf.

Training Videos

There are a series of training video's that can be found on YouTube.

3.0   CMS USER ID CERTIFICATION REQUIREMENTS

CMS requires everyone who has an enterprise User ID to complete an annual certification of their access needs and to take a security Computer Based Training (CBT) course. Users who do not complete these two tasks by their certification due date will have their access rights revoked.

Six weeks prior to the due date, each user receives an e-mail message notifying him/her of the need to certify and complete the CBT. The e-mail contains Web browser links to the EUA application and to the CBT Web pages.

Beginning two weeks before the due date, a daily reminder notice is sent to those users who have not completed the certification requirements. If the users do not perform both certification tasks before the deadline, their access rights are revoked.

Users whose access rights have been revoked due to non-certification must request reinstatement by contacting the CMS Service Desk at 800-562-1963. Reinstatements will be granted for a two-week period. If the user does not complete the certification within the two-week period, the User ID will again be revoked.

NOTE **Electronic certifications require approval before the user is considered certified. Please allow some time for this approval process, i.e., do not wait until the day before expiration to submit the certification request.**

3.1   Off Cycle Certification

CMS employees whose Admin code is changed will need to certify their System Access within two weeks of the change. This requirement only applies to CMS employees and Commissioned Corps employees. Admin code changes can be made by CAAs, or by a change detected in the nightly Human Resources (HR) feed.

Contractors whose contract values are changed will need to certify their System Access within two weeks of the change. Contract value changes can be made by CAAs or the Federal Approver of the contract.

Only the System Access need be done at that time; the CBT is not required for off cycle certification.

3.2   New User Certification

All new users will be required to take the CBT within 72 hours of their account being created. Account creation date is the date in which the ID was approved connection to the first job code.

4.0   EUA

EUA is a web-based application used to provide users with an interface to the CMS identity management services. The two principal uses of EUA for end users are for the annual user certification of access requirements and password management. Use of EUA is encouraged by CMS, since its capabilities will simplify the User ID management process for users.

4.1   Installation of EUA

Since EUA is a Web-based application, no user installation is needed. The only software needed on the user workstation is a Web browser such as Internet Explorer or Google Chrome. CMS employees have an icon (Figure 1) for EUA on their desktops. Other users can create a desktop icon for EUA.

Figure 1: EUA Logo

4.2   Accessing EUA from the Internet

EUA can be accessed from any internet connection by using URL https://eua.cms.gov .

4.3   Accessing EUA from the CMS Network

EUA is accessed by entering the following URL in the Web browser: EUA Login

Users then enter their CMS enterprise User ID and password illustrated in (Figure 2).

Figure 2: EUA Log On

4.4   EUA HOME SCREEN

Upon successful login to EUA, the user is presented with the home screen illustrated in (Figure 3).
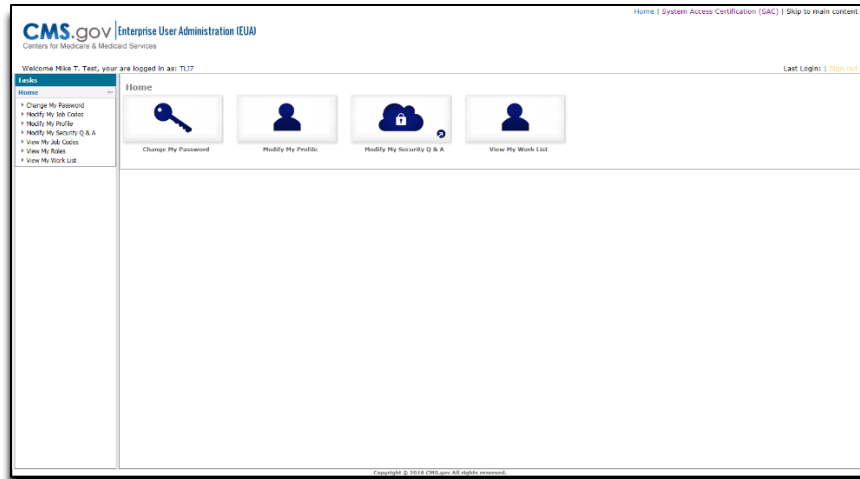
Figure 3: EUA Home Screen

This screen lists the items on which the user has accounts, and the status of those accounts:

- Task: Here you will click on the task you wish to perform.
- Home: Quick link buttons for you to click on to perform desired task.

EUA Info: Contains CAA Listing, Jobcode Listing and EUA Doc's & Links (Links to EUA Documentation and videos).
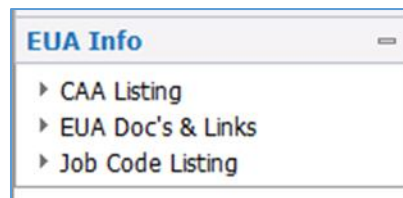
Figure 4: EUA Info Menu

4.4.1   CAA Listing

Use this task to locate a CAA. If you cannot locate a CAA with this process, please use the Org Path value from your First Approver (see section 5.1 **View My Identity** page 10).

Navigate to 'EUA Info >> CAA LISTING' and input your Organization (Figure 5)

For Example: if you are in "OIT"

1. Org Path
2. Contains
3. OIT
4. click Search

Figure 5: CAA Listing Search

Your Group CAA can assist you with many EUA issues.

- password resets
- account unlocks
- general EUA questions
- connect or disconnect of access (jobcodes)
- update of user details
- name
- address
- phone
- building
- region
- desk location/mail stop
- Admin Code/Organization
- non-CMS email address
- contract / plan / carrier numbers (applies to non-CMS users only)
- UPN update (applies to non-CMS users only)

4.4.2   EUA Doc's & Links

EUA Doc's & Links is a single starting point to find any EUA Guides, videos or other helpful links. Each web link will open to a new page outside of EUA and some require the user log into the new site. Example of EUA Doc's & Links (Figure 6)

Figure 6: EUA Docs & Links

4.4.3   Job Code Listing

A Jobcode Business Owner is the only point of contact for information about their jobcode. The business owner will provide information in the EUA system, other than this information EUA has no additional detail.

To search for a jobcode:

- In the tasks pane navigate to EUA Info >> JobCode Listing
- Search for a jobcode (Figure 7). Enter the jobcode name or keyword and click search. (For a keyword search change the "=" to "contains")

Figure 7: Jobcode Search

1. Your search will be displayed with basic details. To view more details, click **Select**. (Figure 8)

Figure 8: Jobcode Results

4.5   EUA CERTIFICATION SCREENS

Once your ID is DUE for system access, log into EUA System Access page. Illustrated in Figure 9 (URL will be provided in the email that prompts you to take the system access, or you can click the link in the upper right-hand corner of EUA)
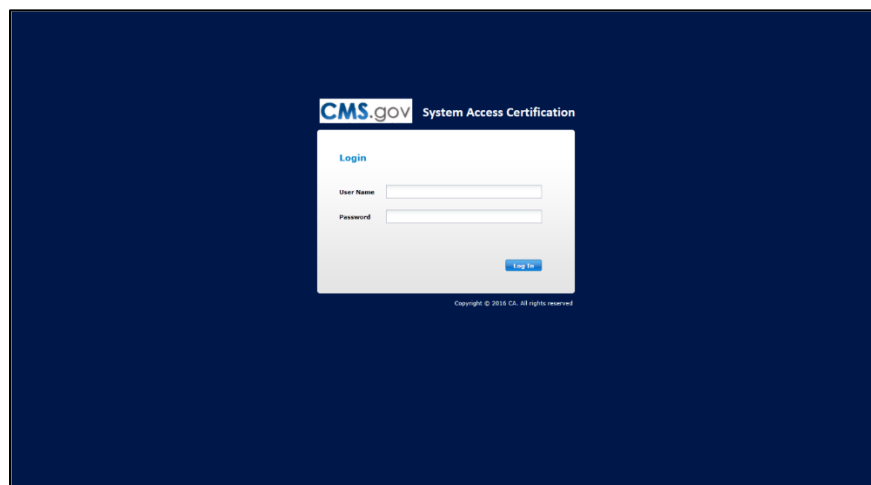
Figure 9: EUA Certification Page

Once logged in you will see that you have a certification to complete, click on Certify to take the system access (Figure 10).
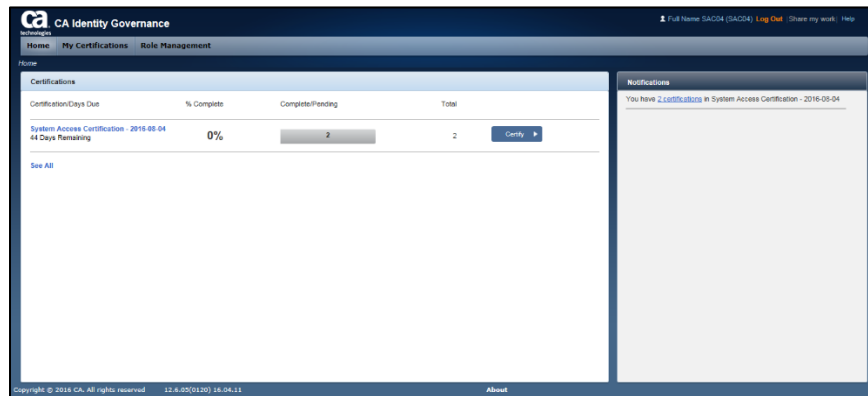
Figure 10: System Access home page

After clicking Certify, you will see your name in the left-hand column and the job codes connected to you in the right. To select all the job codes, click the check box beside your name. Illustrated in (Figure 11).
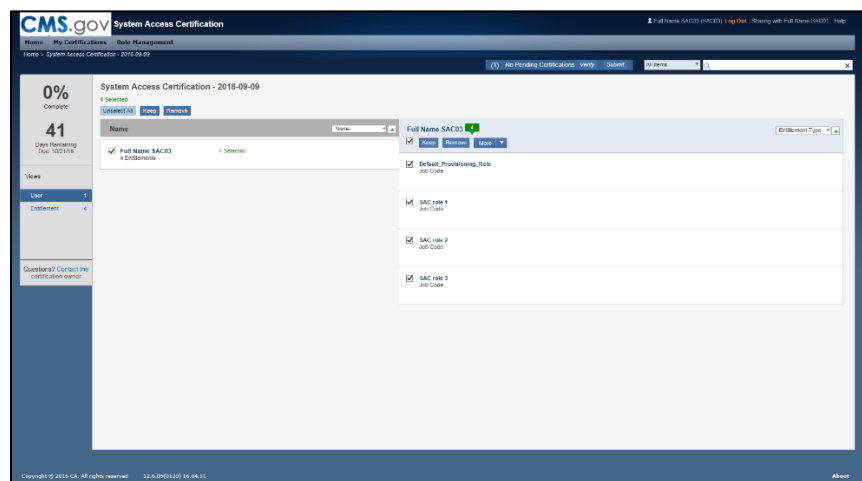
Figure 11: System access screen

Click Keep to certify that you still need access to those job codes or remove for any job codes you no longer need. Once you click keep/remove, you will be taken to the summary page illustrated in (Figure 12).
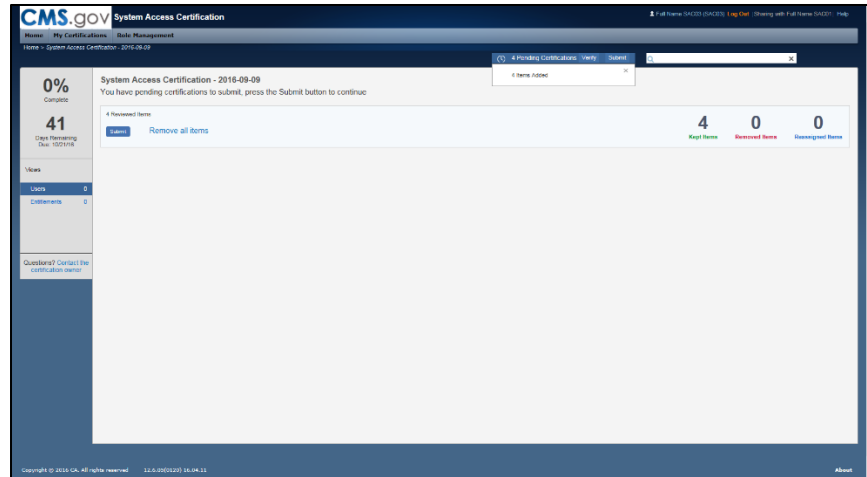
Figure 12: Agree and Decline Buttons

Once you click Submit, you will receive a pop up thinking you for completing the system access (Figure 13).
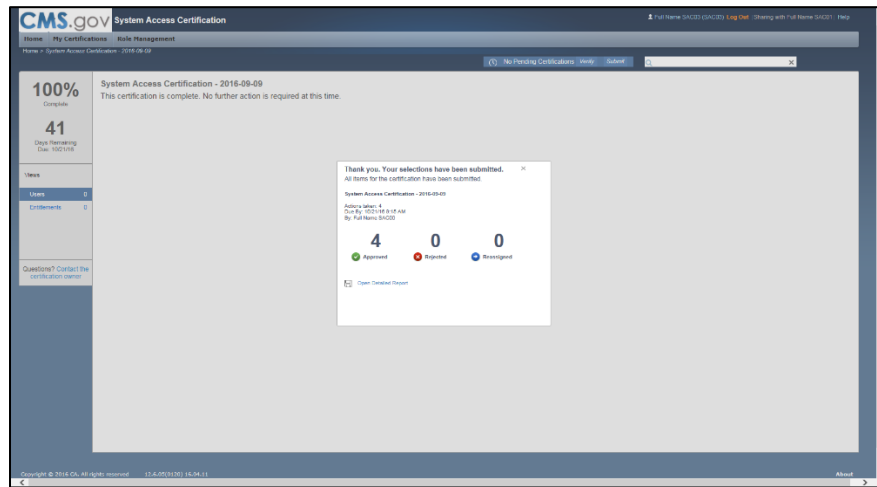
Figure 13: Certification Screen

Click the "x" in the upper right-hand corner. You have now completed your portion of the system access and it is now pending approval from your first approver

5.0   MANAGING PASSWORDS

Users will need to use EUA to change their passwords, and then all their connected platforms will have the same password. There are two password policies for CMS employees in EUA, a 60-day policy and a 365-day policy. All Non-CMS Employees will be on a 60-day policy. To view which password policy applies to your account, use the View My Identity task located in section 5.1   View My Identity. All other users are in the 60-day password policy.

5.1   View My Identity

NOTE **All users now update their LEGAL NAME (and CMS Email if provisioned) through the EFI application. Please see Section 22.0   LEGAL NAME CHANGE in this document.**

Click on View My Identity task under Home. (Figure 14)
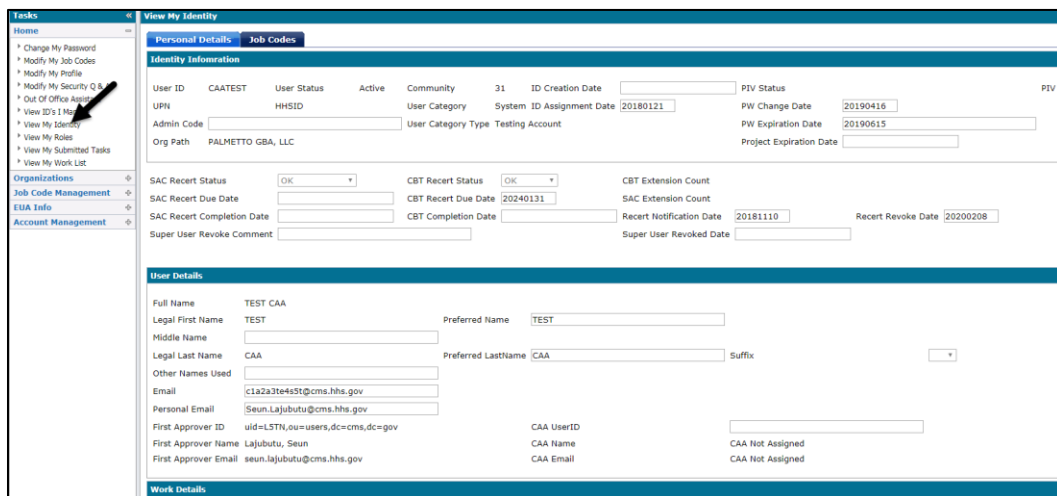
Figure 14: View My Identity Page

This will take you to the View My Identity page. You will see all your information listed. Click the Job Codes tab. (Figure 15)
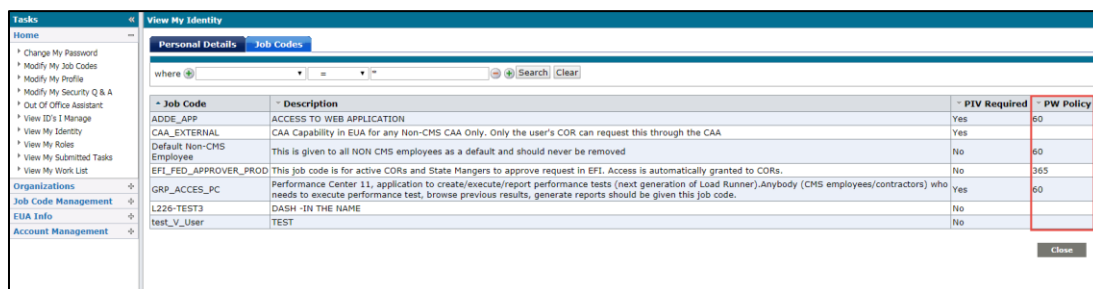
Figure 15: Job Codes to Which You Are Connected

Here you will see a list of job codes that you are connected to. If you have any job code that has a password policy of 60 days, your password policy will be set to 60 days. If you would like to be removed from the 60-day password policy job codes, please contact your CAA, or use the Modify My Job Codes task, find more information in the 6.0 MANAGING ADDITIONAL ACCESS section. Your CAA can be found using the CAA listing under EUA Info.

5.2   Using EUA to Manage Passwords

EUA is the preferred tool for managing users' passwords. Selecting the Change my Password link displays the following screen, as illustrated in (Figure 16).
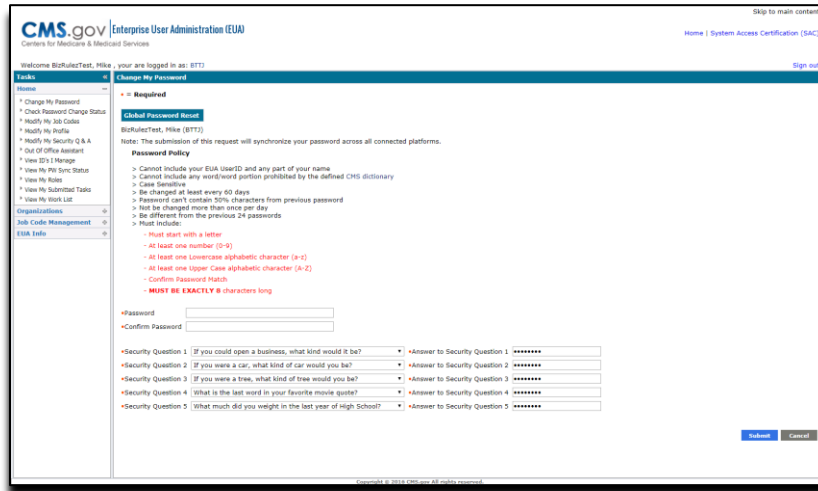
Figure 16: Password Screen

Type in the new password and confirm. (Figure 17)
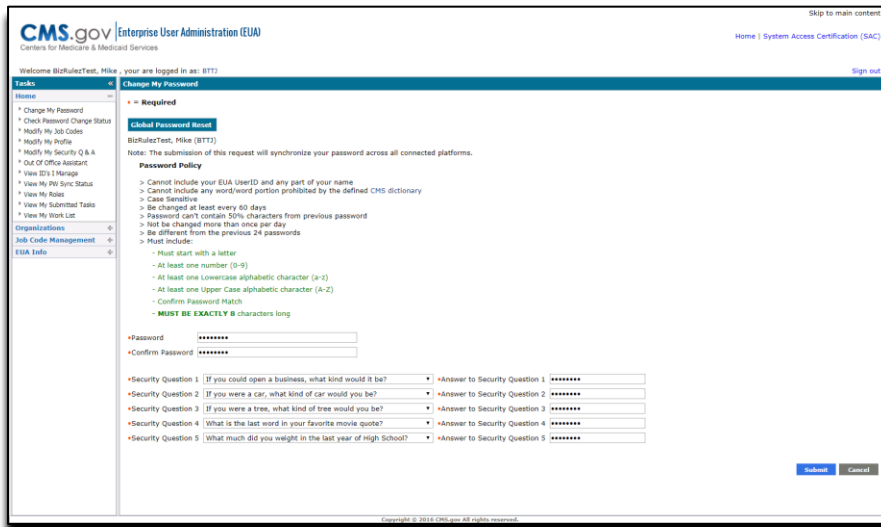
Figure 17: Password Screen: Entering the new password

Click submit, you will see the Confirmation page (Figure 18).
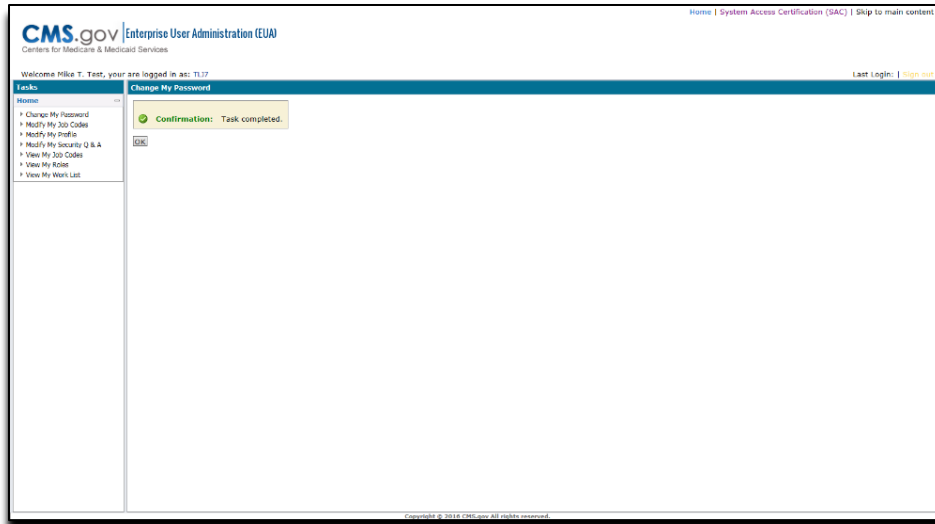
Figure 18: View Status of Password Changes

Click OK and you will be taken back to the EUA home page.

5.3   Setting up Authentication Questions in EUA

EUA can also be used by users who have forgotten their passwords, or who have been revoked by mistyping their passwords. In order to utilize this feature, users need to set up challenges that can be used to authenticate them prior to password reset. This is done by selecting the "Modify My Security Q & A" button, as illustrated in (Figure 19).
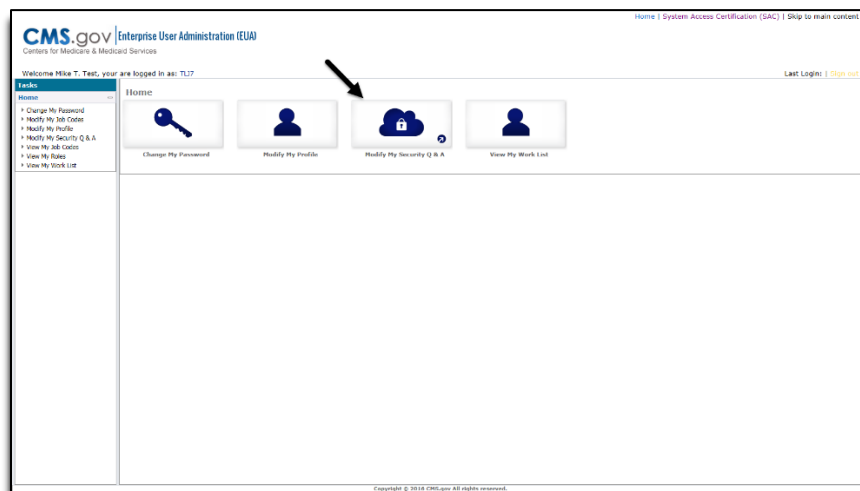
Figure 19: Challenges Tab

This brings up the "Security Q & A" screen, as illustrated in (Figure 20).

Figure 20: Edit Challenge Screen

To set up the answer, the user types and retypes the response and selects "Submit." Responses must be provided for all questions. The same response cannot be used for more than one challenge.

5.4   Logging on to EUA without a Password

After the questions and responses have been set up, the user can access EUA without a password. This is done by selecting "Forgot Password?" in the initial EUA logon screen, as illustrated in (Figure 21).

Figure 21: Log On Without Your Password Screen

The user will be asked to provide the user ID, as illustrated in (Figure 22).

Figure 22: User ID Screen

After you enter your User ID click OK and the next screen will show your chosen questions, answer those correctly and you will be able to enter a new password (Figure 23).
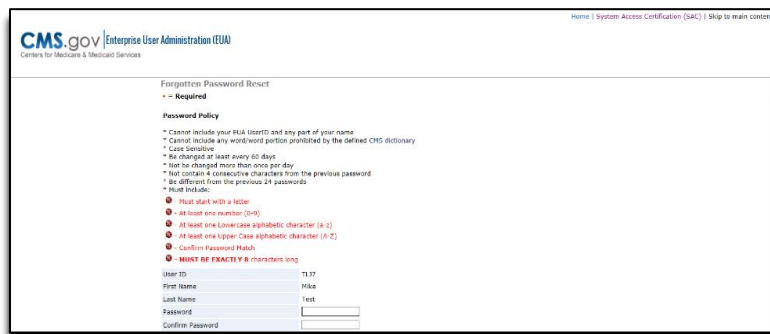
Figure 23: Password Tab

Upon completion of the password change, all user accounts are restored with the new password, and the password is valid for 60 days.

5.5   Inactivity Revocation

Users who have not changed their password for 60 or 365 days, depending on which policy they have, will have their User ID disabled.

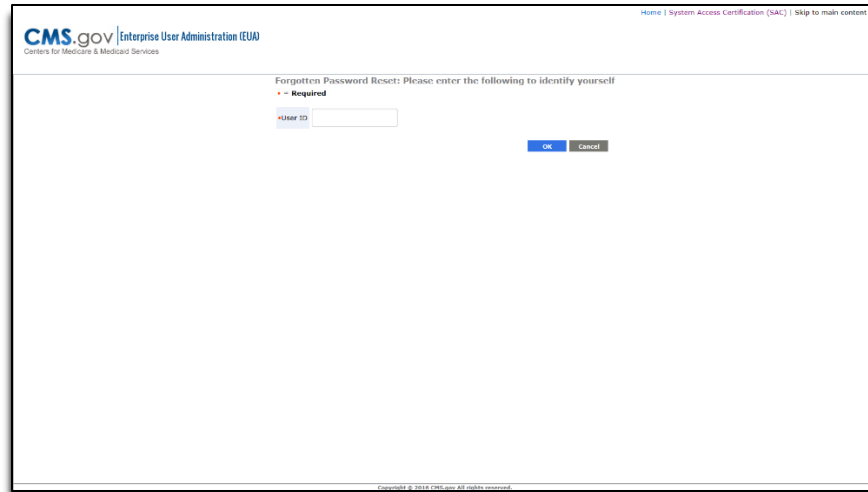These User IDs will remain in a disabled state until the user contacts their CAA or the CMS Service Desk and requests they be unlocked. There is no limit to the number of times a User ID can be unlocked for inactivity. However, owners of CMS User IDs must perform annual certification for the User ID. If the User ID is not certified by the due date, it will be revoked, and then deleted 30 days later.

Certifying a CMS User ID does not exempt it from revocation for inactivity; conversely, inactive User IDs are not deleted unless they are not certified each year.

This policy allows infrequent and Internet-only users to retain their User IDs; it also enables purging of User IDs that no longer have a need to access CMS resources.

6.0   MANAGING ADDITIONAL ACCESS

6.1   Job Code Terminology

EUA job codes provision access to applications or other system resources. Various EUA documentation and the EUA support software will also refer to job codes as Profiles or Entitlements.

1   The complete list of job codes is found: Job Code List
2. VPN job codes are further detailed: VPN Job Codes Definition Downloads - Users

6.2   Connect Additional Access

Connect Additional Access is used when an employee or contractor has an active CMS User ID and additional access is required. You will need to have your CMS User ID, typically a four or seven-character alphanumeric ID, and the access you require. Access to CMS systems, databases and applications are defined through Job Codes.

1. Sign on to EUA
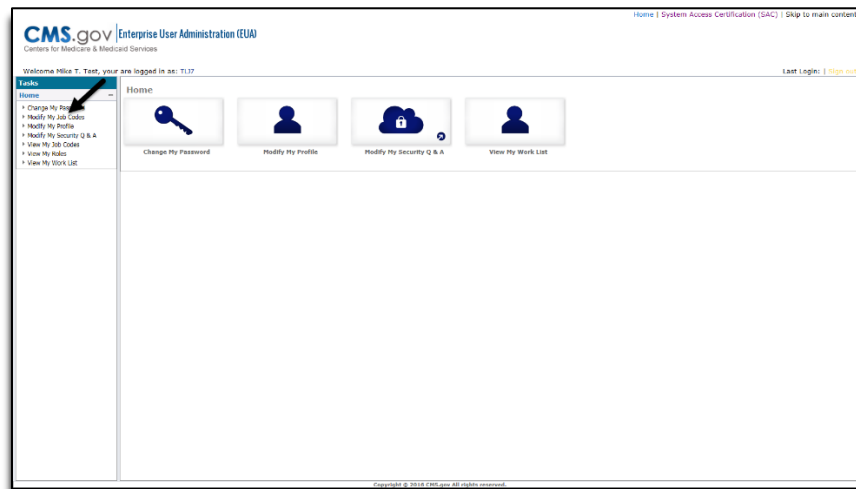2. Click Modify My Job Codes (Figure 24)

Figure 24: EUA

3. You will need to confirm that you understand that one or more of your job codes could be disconnected if you uncheck them during the Modify My Job Code request. (Figure 25)
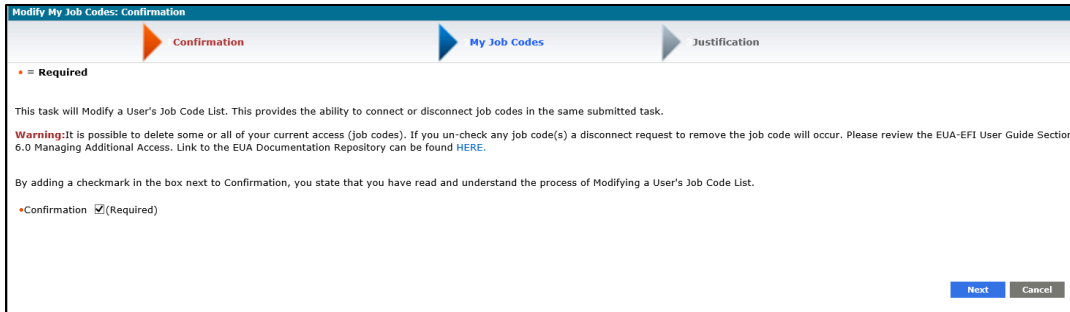
Figure 25: Confirmation page

NOTE **If you do not check the box, you will receive an error message. (Figure 26). If you see this error, please click the Back button and check the Confirmation box.**
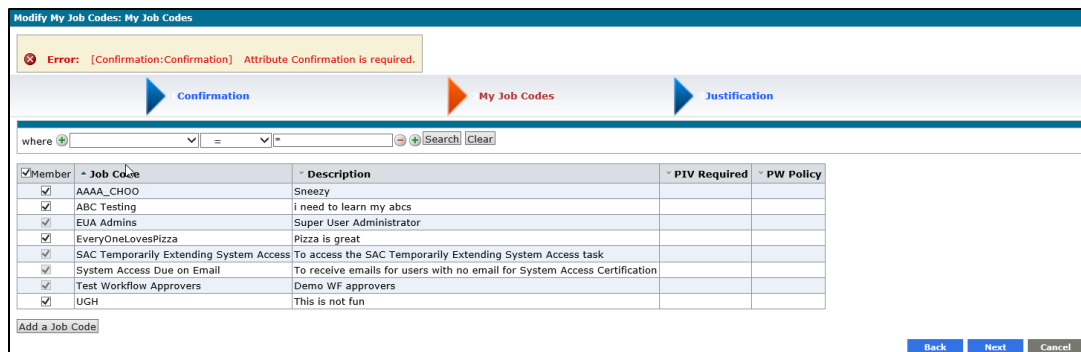

Figure 26: Confirmation error message

This screen (Figure 27) will show the job codes to which you are connected. To request additional job codes be connected to your account, click Add a Job Code.

If any job code is unchecked at any time during a Modify My Jobcode request, you will submit a disconnect request for that job code. NOTE: Do not un-check any Job Code that you want to keep connected. The next section (6.3   Disconnect Job Code) covers this topic in detail.
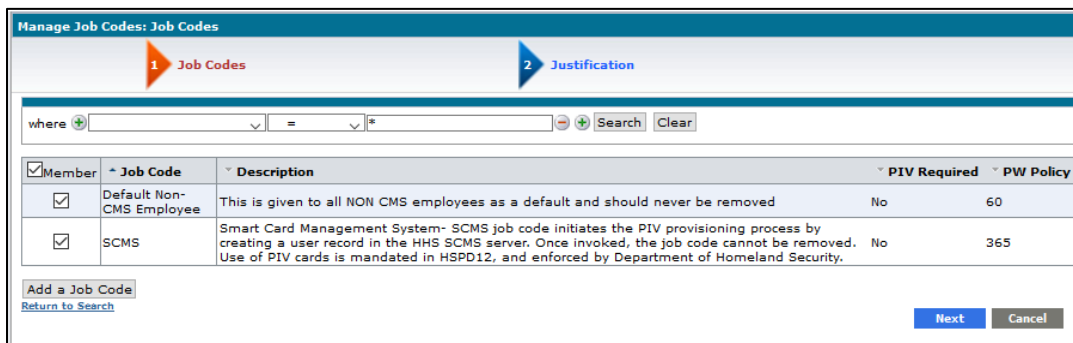

Figure 27: EUA Modify Job Code Task Screen

This will bring up the job code search:

- You can search by using the job code name, the description or the business owner.
- Once you find the job code(s) you would like to request access to, click the check box on the left of the job code name.
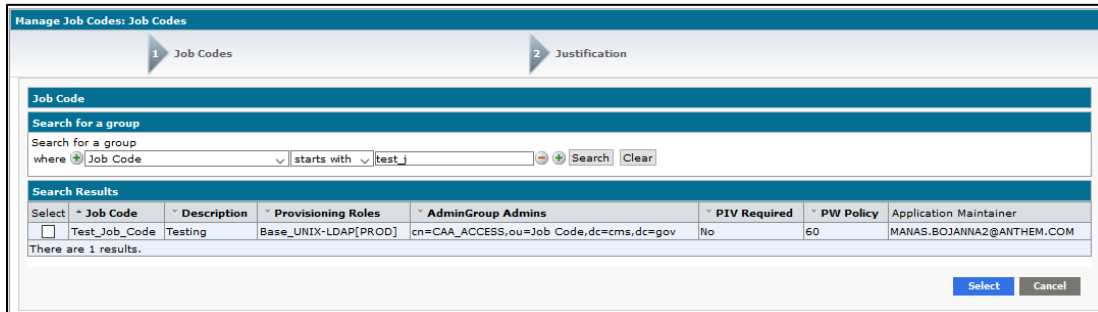- Once you have the job code(s) selected click select (Figure 28)

Figure 28: Select Job Code

After you select the needed job code(s), you are presented the Modify Job Codes page in which the job code(s) selected on the previous step should be displayed (Figure 29). **Reminder: if you un-check any job code(s) a disconnect request to remove the job code will occur.** Click Next.
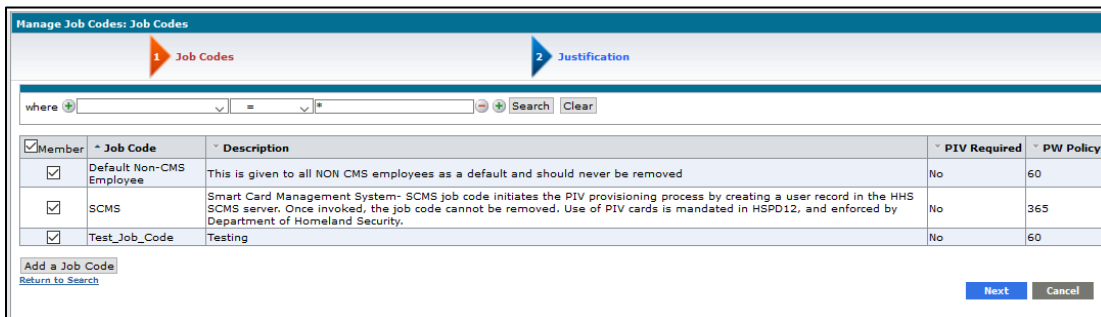
Figure 29: Requested and Awarded Job codes

You will now need to enter the justification. Once the justification is entered, click finish (Figure 30).
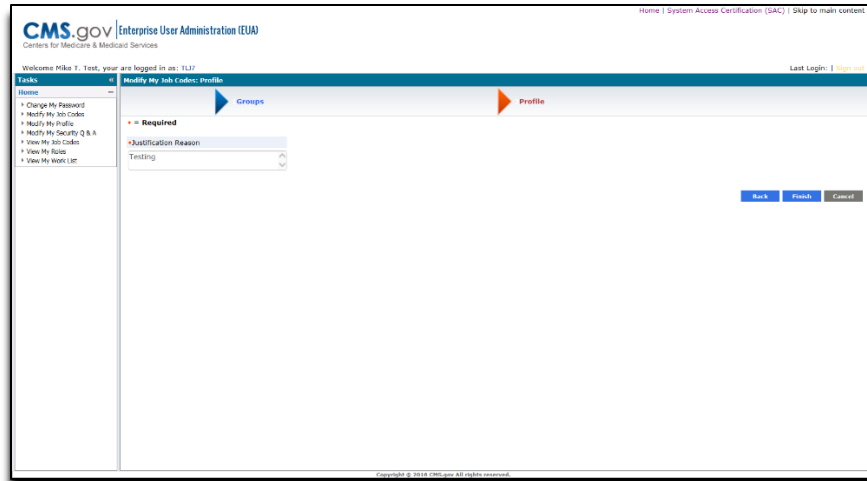
Figure 30: EUA Connect Job Code Justification

After the request is submitted, you will see an alert page letting you know that the request is pending approval; you will then click OK and will be taken back to the home screen. (Figure 31)
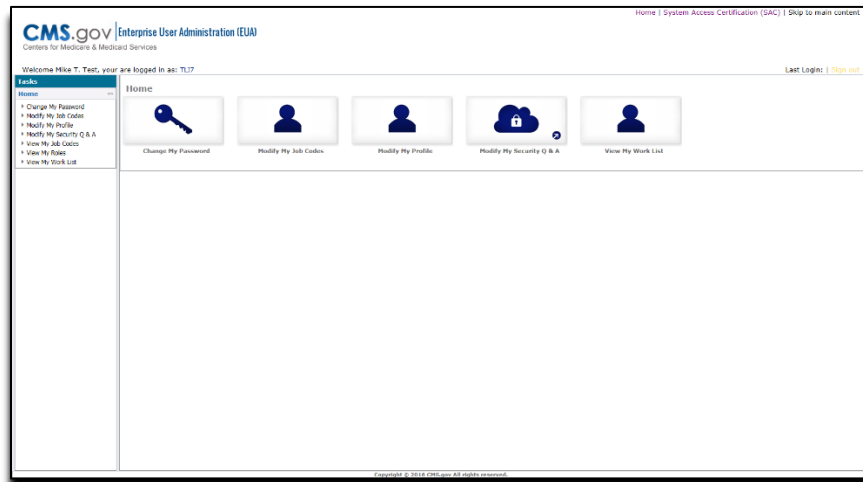

Figure 31: EUA Home screen

The request is routed to the designated approver. On approval, the access is granted.

6.3   Disconnect Job Code

To start the process, the requestor selects the Modify My Job Codes task in the Home sub-menu on the left menu Tasks Pane. (Figure 32)
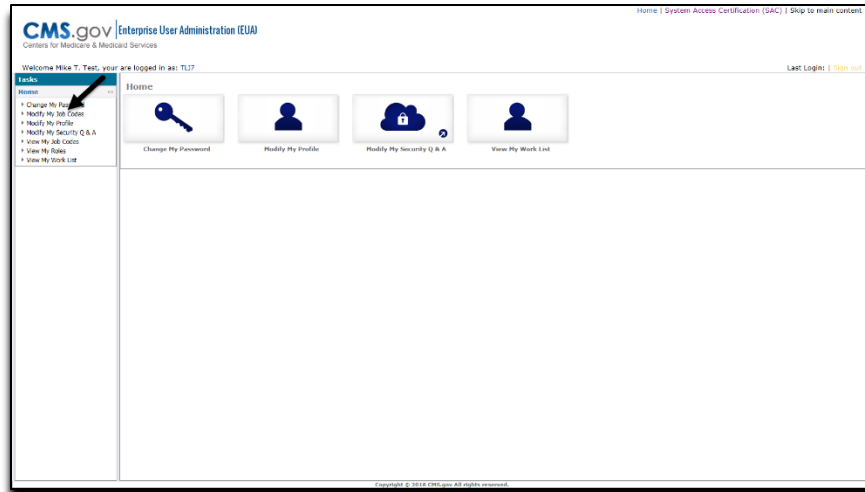
Figure 32: EUA Disconnect Access

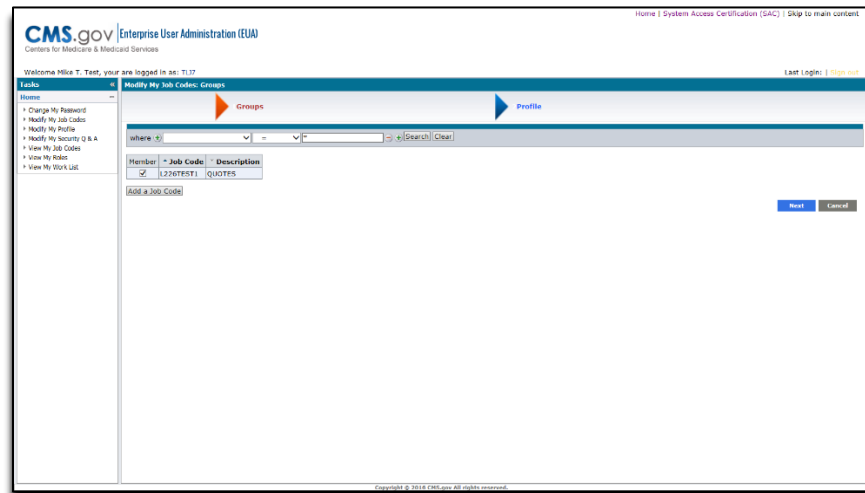You will show the job codes to which you are connected (Figure 33).

Figure 33: EUA Disconnect Access Job Code Selection

Click on the check box to remove the check from the job code that you wish to disconnect. Click Next. This will bring up the justification screen. Enter in the justification and then click Finish (Figure 34)
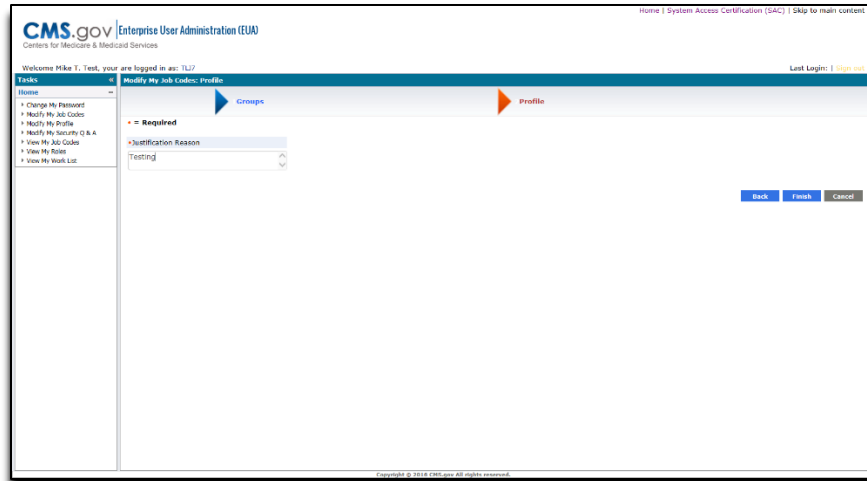
Figure 34: EUA Disconnect Confirmation screen

Once you click Finish, you will see a page that shows the Task is pending. (Figure 35).

The request is routed to the designated approver. On approval, the access is removed.
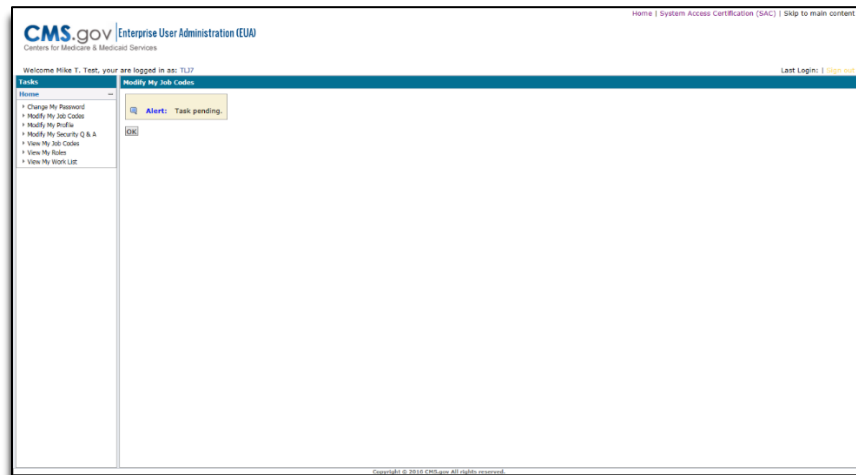

Figure 35: EUA disconnect request

6.4   Viewing Job Codes

After logging into EUA click View My Job Codes, if you care connected to job codes they will show here (Figure 36)
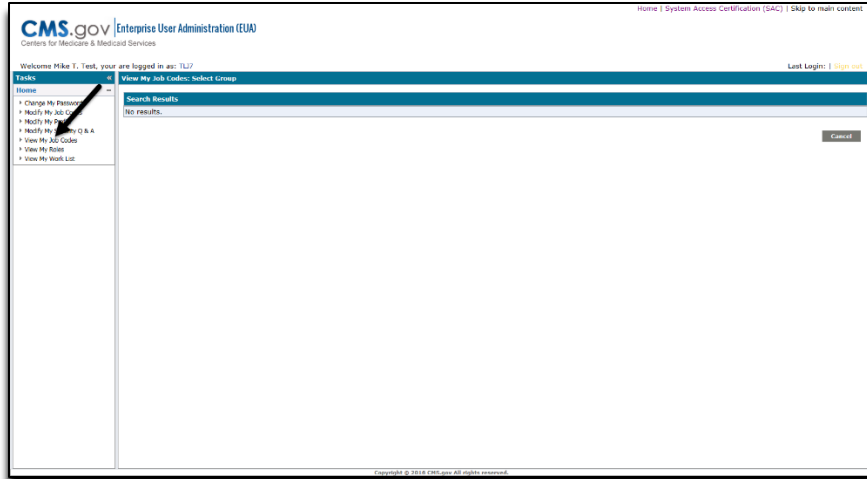
Figure 36: User's Entitlements (Job codes)

7.0   MODIFY MY PROFILE

Once you have logged into EUA, click on the Modify My Profile task under Home (Figure 37)

Figure 37: Modify My Profile

Here you will be able to update some of your information that EUA has on file (Preferred Last name, Preferred First name, other names used, Work phone number, personal phone number, and personal email address)

Once you have changed the needed information, click submit.

8.0   VIEWING EXISTING REQUESTS

To view requests you have submitted, look at the Home page, then click View My Submitted Task.

The search screen will appear (Figure 38). Enter in the search criteria that you would like to view the request that you submitted and click search. (Default search is set for the current date)

If the request is more than two weeks old, you will need to check the box to the left of "Search archive of submitted task".

Figure 38: Submitted Task Search Screen

This will pull up your entire submitted task that meet the criteria. To view the request, click on the view icon to the left of the request (**Figure 39**)
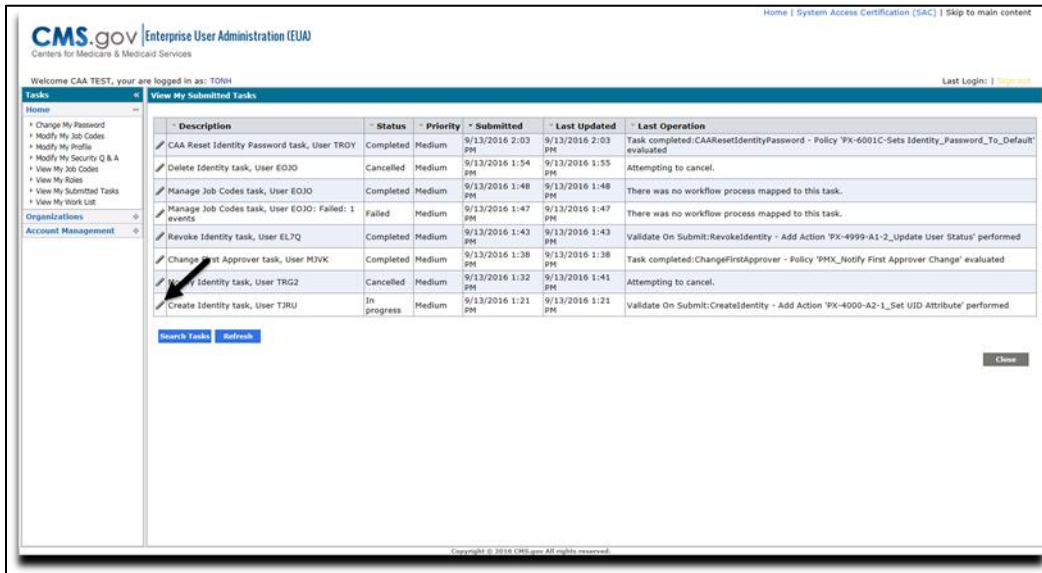
Figure 39: View Submitted request

This will show you the information on the request (**Figure 40**)
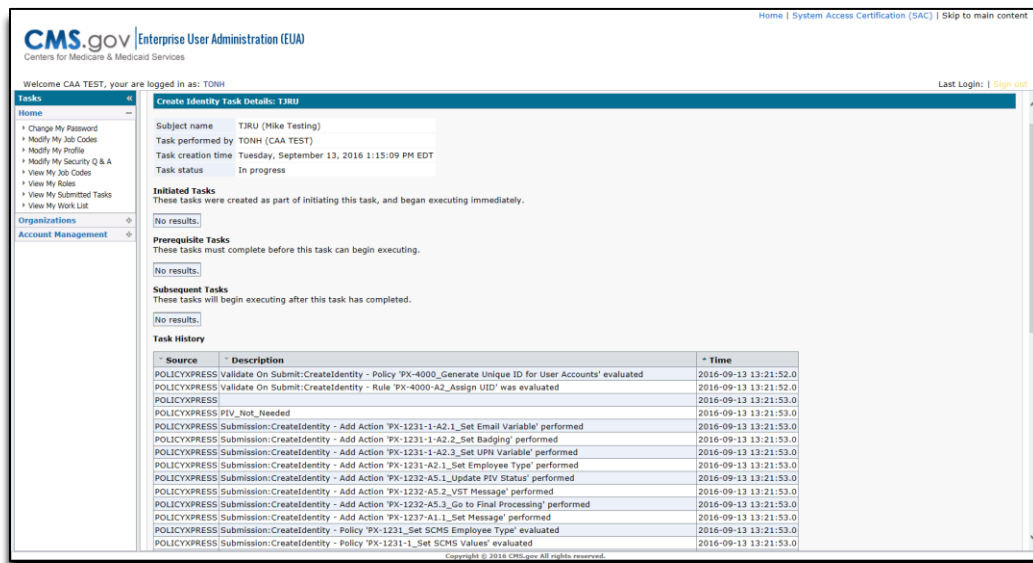

Figure 40: View Submitted Task Details

9.0   INTRODUCTION TO EFI

EUA Front-End Interface (EFI) is a web interface which allows users to request access to the Centers for Medicare & Medicaid Services (CMS) network, application, and facility resources. In order to access the website, the user must first register for an account. EFI then provides the user the ability to fill out an access request form (HHS-745) online to obtain a new CMS ID. **EFI is only supported in Google Chrome v69+ or Microsoft Edge 89+.**

This document guides the user through the registration process, login process, username and password management process, how to export the HHS-745 pdf form, and how to request a PIV Card when a user is already registered in EFI and has an existing CMS ID in Enterprise User Administration (EUA).

There are four distinct user categories in the application when going through the PIV request process. Each is described below with some data points needed for each user category.

CMS Employee category is for new employees going through the onboarding process, as well as CMS Commission Corps joining CMS. Both are referred to as CMS employees. CMS employees interact with the Human Resources (HR) department to determine when they should fill out the access request form as well as what admin code they will be requiring to onboard at CMS. In order to complete an Access Request as a CMS Employee, you must know your Admin Code, CMS Region/Facility, and if you are a manager or not.

Contractor users make up the majority of the population at CMS. These contractors come from many different companies and work on different contracts. EFI is able to dynamically search contracts and companies to ensure proper data entry. In order to complete the Access Request form as a contractor, you must know your CMS Region/Facility, Company, Contract Number (if applicable), PIV training documentation (if applicable) for PIV requests only, provided by your onboarding company.

Federal Agency users can fill out the Access Request form similar to many users but in most cases already have a Personal Identity Verification (PIV) credential. In order to complete an Access Request as a Federal Agency user, you must know your CMS Region/Facility, Federal Agency you work for, and the User Principal Name (UPN) from your PIV card/Common Access Card (CAC).

Business Partners are a user category that encompasses those that partners with CMS for critical transactions tied to the CMS mission. In order to complete an Access Request as a Business Partner you must know your CMS Region/Facility and your company specific information such as Plan Number if you are of type HPMS/HICS or Labeler Code(s) if you are a Medicaid Drug Manufacturer.

10.0   THINGS YOU NEED TO KNOW BEFORE REGISTERING

Please log into EUA and go to "Modify My Profile" to verify your information is correct. It is very important that this information is accurate. You **must** use the primary email address listed in EUA when registering in EFI. If you modified your EUA profile, please wait until the next day to continue your registration. If you cannot modify your EUA profile, please request to your CAA to update the information for you.

Information your Federal Approver/CMS COR must provide to you:

- Category
- Type
- Region
- Full Contract Number (including the task order)

STOP! If you do not have the above information do not proceed.

NOTE **If you previously had a EUA ID, please verify that it has been properly deleted and not labeled with a status of REVOKE since this will cause issues when applying for a new EUA ID. Please contact the First Approver/ CMS COR to coordinate the deletion with the CAA in EUA before continuing the new request in EFI.**

11.0   HOW TO REGISTER IN EFI

The EFI registration process distinguishes between those users who are Existing Users and currently have a CMS USERID (registered in EUA) and those who are New Users and do not. Your first question asks, "Do you already have a CMS USERID?

If the answer is "Yes", you will need to enter your CMS USERID and SSN. After clicking the "Sign Up" button, you are then required to enter a desired EFI username and EFI password. Additionally, you may change your email address if the EUA email address is not current. You then enter your email address a second time. After clicking the "Sign Up" button, you will be returned to the login screen and be able to login to EFI without any waiting as your account is immediately activated.

If the answer is "No" you should open the EFI New User Guide and follow those instructions for registering with EFI as a New User.

NOTE **Your EUA CMS ID login is separate from the new EFI account that you will create when you register in EFI. Both systems use a separate login authentication.**

Click **Register** from the EFI login page (EUA - EFI Login Page).
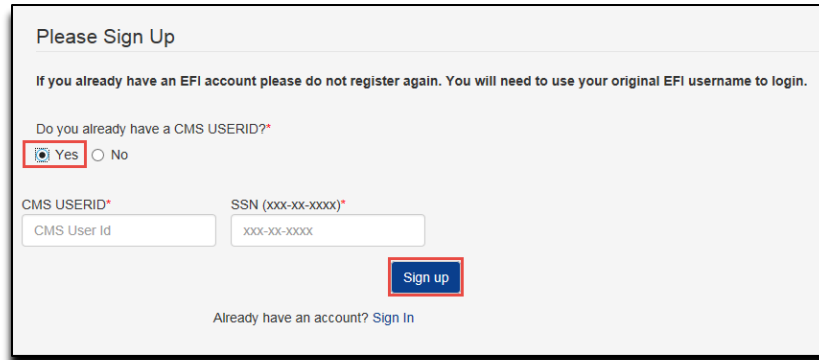
Figure 41: Register with EFI

Select the **Yes** radio button to answer the question, "Do you already have a CMS USERID?" Enter your CMS USERID and SSN, finally click the **Sign up** button.
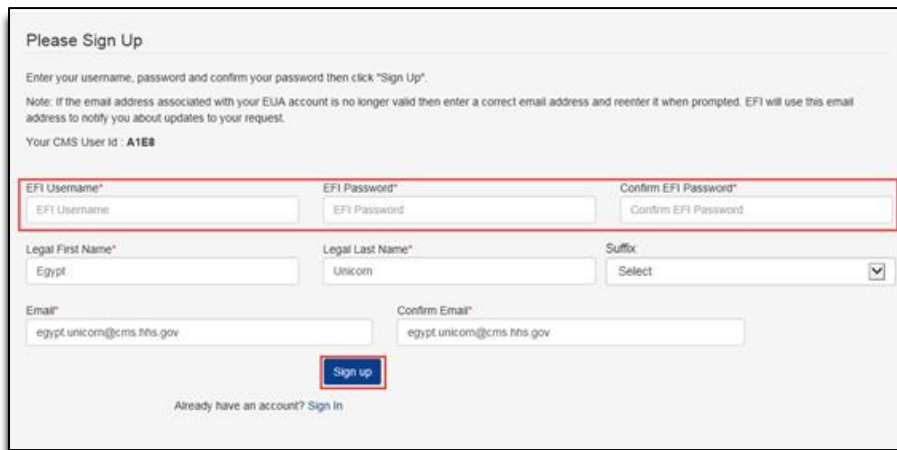
Figure 42: Register – Provide Answer to "Do you have a CMS UserID"

If you are registered with EUA under the CMS USERID and SSN that you provided, EFI pre-populates your Legal First and Last Name and Email Address from your EUA account. You now need to enter an EFI Username and EFI Password to complete registration with EFI. If the email address provided from your EUA account is incorrect, you may now change it in order to receive notifications from EFI about your request.

After you finish filling in all the required fields, click the **Sign up** button.

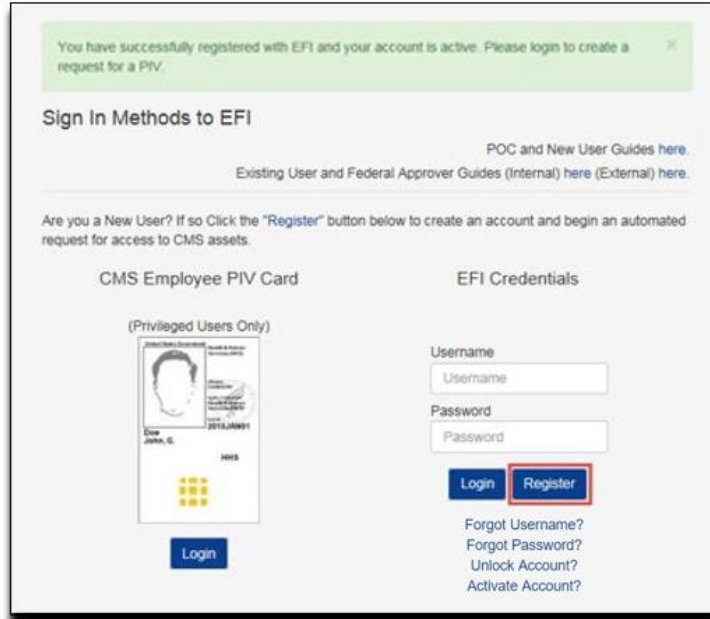**Figure 43: Register – Complete Sign Up form with CMS UserID**

Figure 44: Register – Confirmation of successful registration w/CMS UserID

You will be directed to Login page with a confirmation that you successfully have registered and that your account is active and to please sign in to create a new PIV request.

If your CMS USERID and SSN are not recognized by EUA, EFI will provide a notification that you should verify your CMS USERID and SSN or contact the Help Desk for assistance using the provided link.
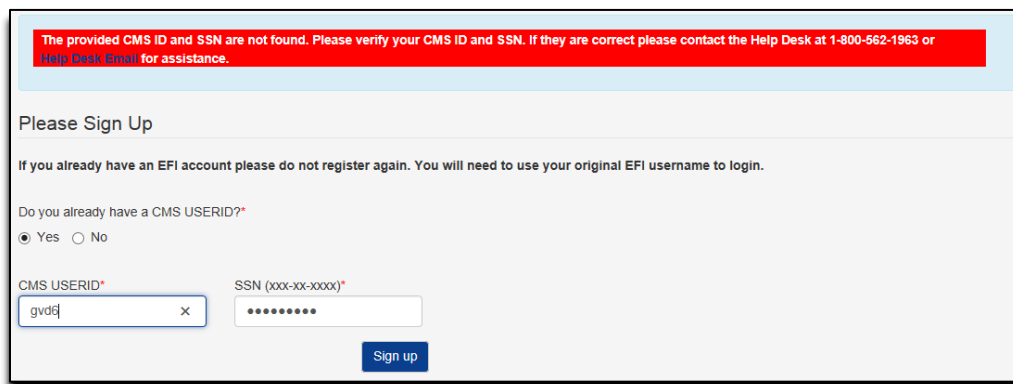

Figure 45: Register – Error Notification to Confirm EUA CMS USERID and SSN

If EFI determines that you already have an account, EFI will provide a notification with links for you to recover your EFI Username and Password.

Figure 46: Register – Error Notification to Recover EFI Username and Password

12.0   FORGOT EFI USERNAME

The "Forgot Username" process allows the user to recover their username. The user must provide their first name, last name, and one of three methods to provide the third item of information – CMSID, SSN, or Email. If there is match in the EFI system, an email message containing the user's username will be sent to the user.

NOTE   **Please be aware that EFI entries are case-sensitive (upper/lower cases) so you will need to enter the information exactly as you did at registration.**
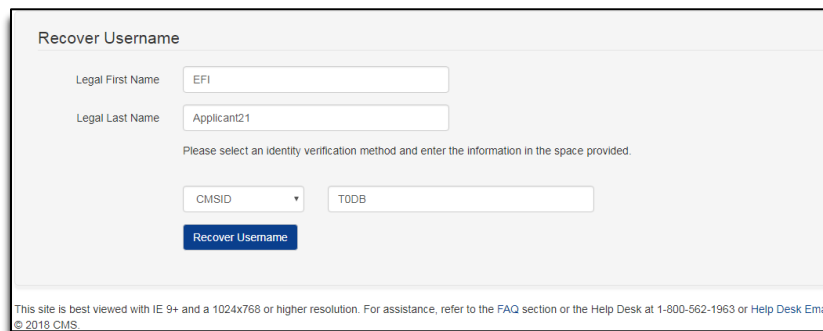
NOTE   **In order to use the CMSID method the user also should have a previous EFI account. Users that have an existing EUA ID, but they just registered for a new EFI account won't be able to use the CMSID method.**

CMSID Method

a.   Click the **Forgot Username?** Link from the EFI login page (EUA - EFI Login Page).
b.   Enter your First Name, Last Name, and select CMSID as the identify verification method.
c.   Enter your CMSID and then click the **Recover Username** button.

NOTE   **Please be aware that the First Name and Last Name will need to be entered exactly as you did during registration otherwise the system won't find your record.**

NOTE   **The user is required to enter a CMS ID (active) from EUA in the field. The user should also have a previous EFI account in order to match the information in the system.**

Figure 47: Forgot Username - EFI CMSID identity verification method – Recovery Username page

d.   You will receive an email at the email address you provided containing your EFI Username.

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, April 17, 2017 2:21 PM
To: Applicant21, EFI <efi.applicant@testing.com>
Subject: EFI User Recovery

Hello EFI Applicant21,

Your EFI username is efi.applicant21

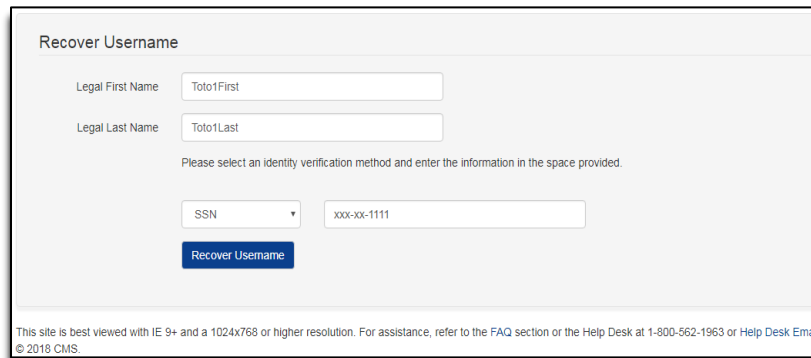Please log into EFI to with your username and password.

Thank you,
Enterprise User Administration (EUA)

Figure 48: Forgot Username - EFI Username Recovery email

SSN Method

If you select the SSN method, you will need to provide the following information: First Name, Last Name, and your SSN for the fields in the "Recover Username" form and then click the **Recover Username** button. For the SSN field you can enter the SSN number with the following format including dashes (xxx-xx-xxxx) or just the SSN number without dashes (xxxxxxxxx).

NOTE **Please be aware that the First Name and Last Name will need to be entered exactly as you did during registration otherwise the system won't find your record.**

Recover Username

| Legal First Name | Toto1First |
| Legal Last Name | Toto1Last |

Please select an identity verification method and enter the information in the space provided.

SSN ▾   xxx-xx-1111

Recover Username

This site is best viewed with IE 9+ and a 1024x768 or higher resolution. For assistance, refer to the FAQ section or the Help Desk at 1-800-562-1963 or Help Desk Email
© 2018 CMS.

Figure 49: Forgot Username - EFI SSN identity verification method – Recovery Username page

You will receive an email at the email address you provided containing your EFI Username:

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, April 17, 2017 2:21 PM
To: Toto1Last, Toto1First <AE00173@wellpoint.com>
Subject: EFI User Recovery

Hello Toto1First Toto1Last,

Your EFI username is toto1

Please log into EFI to with your username and password.

Thank you,
Enterprise User Administration (EUA)

Figure 50: Forgot Username - EFI Username Recovery email - SSN identity verification method

Email Method

If you select the Email method, you will need to provide the following information: First Name, Last Name, and the Email address used during registration and then click the **Recover Username** button.

Note: Please be aware that the First Name and Last Name will need to be entered exactly as you did during registration otherwise the system won't find your record.

Recover Username

| Legal First Name | Jane |
| Legal Last Name | Doe |

Please select an identity verification method and enter the information in the space provided.

Email ⌄   jane.doe@gmail.com   ✕

Recover Username

This site is best viewed with IE 9+ and a 1024x768 or higher resolution. For assistance, refer to the FAQ section or the Help Desk at 1-800-562-1963 or Help Desk Email
© 2018 CMS.

Figure 51: Forgot Username - EFI Email identity verification method – Recovery Username page

   a. You will receive an email at the email address you provided containing your EFI Username:

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, January 16, 2018 3:58 PM
To: Doe, Jane <jane.doe@gmail.com>
Subject: New EFI Request Submitted: Bruce Banner

Hello Jane Doe,

Your EFI username is jdoe.

Please log into EFI with your username and password.

Thank you,
Enterprise User Administration (EUA)

Figure 52: Forgot Username - EFI Username Recovery email - Email identity verification method

13.0   FORGOT EFI PASSWORD

The "Forgot Password" process allows the user to reset their password. The user must provide their EFI username, and the email address used during registration. If there is match in the EFI system, an email message containing a link to reset the password will be sent to the user.

Note: Please be aware that EFI is case-sensitive (upper/lower cases) so you will need to enter the information exactly as you did at the registration process.

1. Click the **Forgot Password?** Link from the EFI login page (EUA - EFI Login Page). Enter your Username and Email address at the "Recover Password" form and then click the **Recover Password** button.

NOTE **Please be aware that the Username and Email will need to be entered exactly as you did during registration otherwise the system will not find your record.**

NOTE **If you do not have access to the email address setup in your Username you can use the email address setup in your EUA Profile as primary.**

Recover Password

Username	TestCasePwd
Email	liz.alvarado@anthem.com

Recover Password

This site is best viewed with IE 9+ and a 1024x768 or higher resolution. For assistance, refer to the FAQ section or the Help Desk at 1-800-562-1963 or Help Desk Email
© 2017 CMS
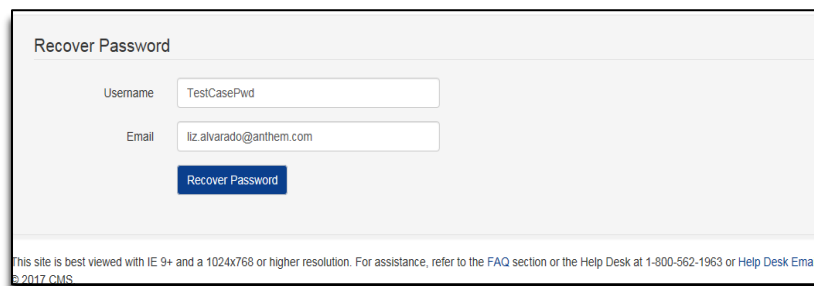
Figure 53: Forgot Password – Recover Password page

2. You will receive an email at the email address you provided containing a link to reset your password:

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, January 16, 2018 3:58 PM
To: Doe, Jane <jane.doe@gmail.com>
Subject: New EFI Request Submitted: Bruce Banner

Hello Jane Doe,

You have requested to reset your EFI account password.

Please select the link below to reset your password:

Reset Password

Thank you,
Enterprise User Administration (EUA)

Figure 54: Forgot Password - EFI Password Reset Email
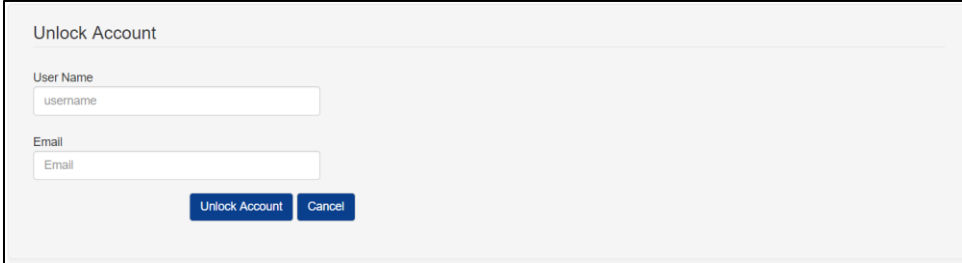
3. Reference Reset Password section for steps on resetting your password.

14.0   UNLOCK EFI ACCOUNT

The "Unlock Account" process allows the user to self-unlock their password without having to call the Help Desk. You can only unlock your account if the account is still active.

1. Click the **Unlock Account?** Link from the EFI login page (EUA - EFI Login Page).

    - Enter your Username and Email address in the "Unlock Account" form and then click the **Unlock Account** button.

NOTE - This feature is specifically for unlocking an account where too many failed login attempts have occurred. You will not be able to unlock your account if it has expired or is inactive. You must still contact the Help Desk in these instances.
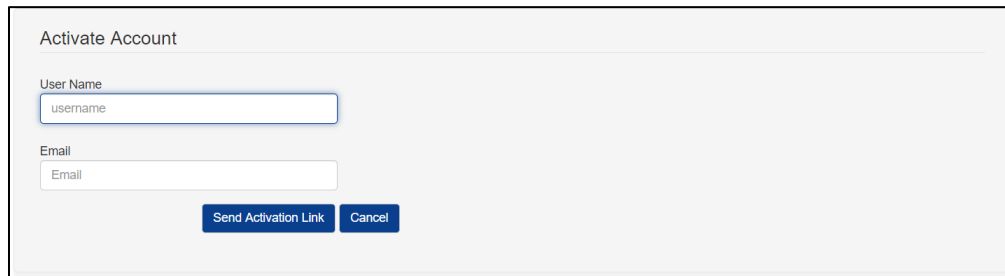
Figure 55: Unlock Account – Unlock Account page

- You will see an Unlock Account success message and be able to login once completed.

15.0   ACTIVATE EFI ACCOUNT

The "Activate Account" process allows the user to request a resending of the account activation link in an email.

1.   Click the **Activate Account?** Link from the EFI login page (EUA - EFI Login Page).

- Enter your Username and Email address in the "Activate Account" form and then click the **Activate Account** button.

Figure 56: Unlock Account – Unlock Account page
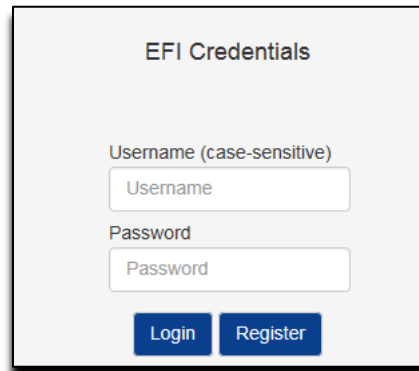
- You will receive an "Email was sent successfully" notification. Follow the email instructions to activate your account.
- EFI will check and, if the user account is already activated, will display a message, "Your EFI account is already activated."
- If the account does not exist EFI will show an error message, "Your UserID and email address does not match."

16.0   EFI LOGIN WITH USERNAME/PASSWORD

The "Login with Username/Password" process requires the user to provide their EFI username and password and accept the Department of Health and Human Services (HHS) Warning message. After a successful login, the user will be directed to the EFI Home Page.

NOTE **Please be aware that EFI is case-sensitive (upper/lower cases) so you will need to enter the information exactly as you did at the registration process.**

1. From the EFI login page (EUA - EFI Login Page) enter your EFI Username and Password under the **EFI Credentials** section and then click the **Login** button.

Figure 57: Login with Username/Password – EFI Credentials section

2. At the **WARNING** pop-up message, click the **Agree** button once you are ready to continue.

3. A successful login will take you to the EFI Home page, which will display "Welcome to the CMS Network, Application, & Building Access Request Application!"
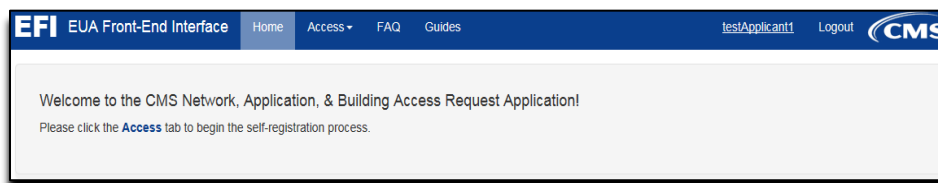
Figure 58: Login with Username/Password – EFI EUA Front-End Interface Home Page

17.0   UPDATE EFI EMAIL ADDRESS

The EFI system allows the user to update their email address setup from their username. The user will only be able to perform the update after a successful login.

1. From the EFI Home Page the user should click on the Username on the top menu.
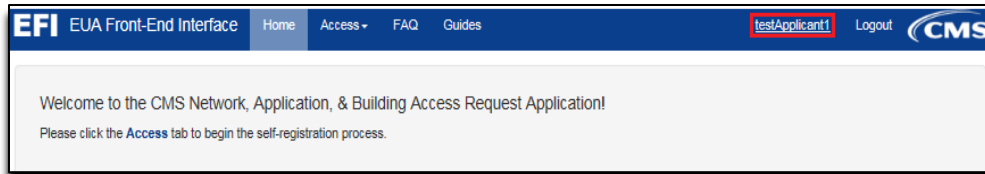
Figure 59: Update EFI Email Address – EFI EUA Front-End Interface Home Page

2. In the Account Details page, please click the **Change Email** link to update the email address.

Figure 60: Update EFI Email Address – Account Details Page

3. In the Change Email page enter the new email address in both fields. Once you finish, please click the **Change Email** button or the **Cancel** button to go back to the Account Details Page.
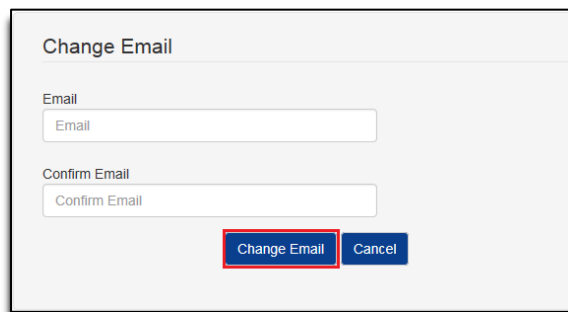
Figure 61: Update EFI Email Address – Change Email Page

18.0   RESET EFI PASSWORD

The "Reset Password" process allows the user to provide a new password for their account. Once the user completes the [Forgot Password](#)process, they will receive an email message containing a link to initiate the "Reset Password" process. After clicking the "Reset Password" link, the user will be directed to the EFI page where they can enter their username and a new password.

NOTE **The password must be between 8-24 characters long and must contain at least one uppercase letter, one lowercase letter, and one special character. Please do not use previous 6 passwords.**

1. Refer to the [Forgot Password](#) Section of this document for instructions on how to initiate password reset. Once you receive the EFI Password Reset email, click the **Reset Password** link within the email:

NOTE **Do not use this link to login to EFI. Please open a new browser and enter the URL manually.**

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, January 16, 2018 3:58 PM
To: Doe, Jane <jane.doe@gmail.com>
Subject: New EFI Request Submitted: Bruce Banner

Hello Jane Doe,

You have requested to reset your EFI account password.

Please select the link below to reset your password:

Reset Password

Thank you,
Enterprise User Administration (EUA)

Figure 62: Reset Password – EFI Password Reset Email

2. Complete the "Reset Password" form and then click the **Change Password** button.

Figure 63: Reset Password – Reset Password Form

3. Verify the "Password has been successfully changed" message on the EFI login page.

4. You will receive an EFI User Change email confirmation message that your password has been updated.

19.0   CHANGE EFI PASSWORD

The "Change Password" process allows the user to change the existing password for their account.

1. From the Account Details of your profile click the "Change Password" link.
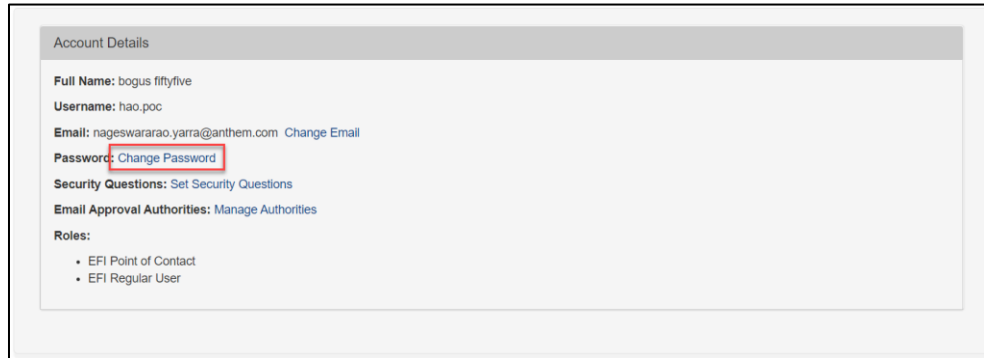
Figure 64: Change Password Link

2. Enter your existing password and the new one. As you enter your password, you will notice the criteria change from red text to green text once you have met the password requirement. Enter your new password again to confirm the password. Click the **Change Password** button.

Figure 65: Change Password – Change Password Form

3. Verify the "Password has been successfully changed" message on the EFI home page.

20.0   SET EFI SECURITY QUESTIONS

The "Set Security Questions" process allows the user to define a set of questions that the user will be required to answer when unlocking their account.

1   From the Account Details of your profile click the "Set Security Questions" link.
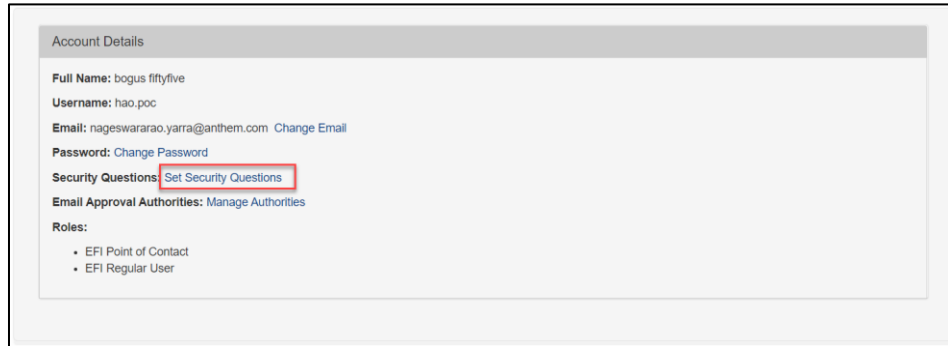
Figure 66: Set Security Questions Link

2   You must select five different questions from the drop-down list and provide answers to each one to complete this process. Once you've selected and answered your questions click the **Submit** button.
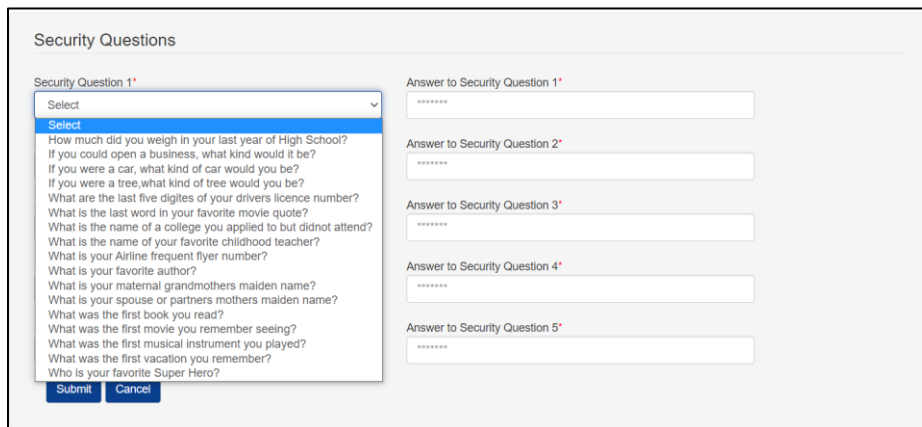
Figure 67: Set Security Questions – Security Questions Form

3   Verify the "Security Questions have been successfully changed" message on the EFI home page.

21.0   EXISTING USER REQUEST / UPDATE PIV CARD

The "Existing User Request/Update PIV" process provides the user the ability to request a PIV card. The user must have an existing CMS User ID issued in EUA and verify that the EUA account information is accurate.

NOTE **The user will register in EFI using their EUA ID and primary email address from their EUA account in order to match the record. Please refer to the <u>Register</u> section for the steps.**

From the EFI login page (<u>EUA - EFI Login Page</u>) enter your EFI Username/Password (EFI is case – sensitive).

NOTE **Reference to <u>Login with Username/Password</u> section for steps on how to Login with Username / Password.**

1. Click the Access menu and then click **Existing User Request/Update PIV**.
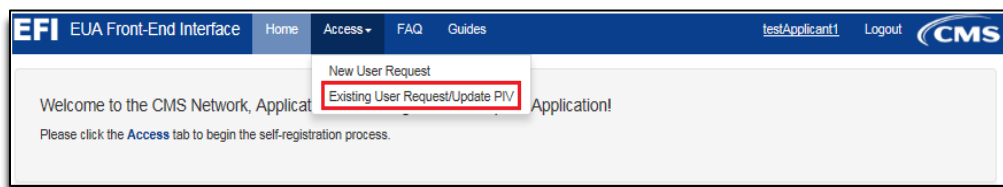
Figure 68: Existing User Request / Update PIV menu

2. If you do not have an existing CMS User ID in EUA, when you click **Existing User Request/Update PIV** option, a message will appear with the following error.
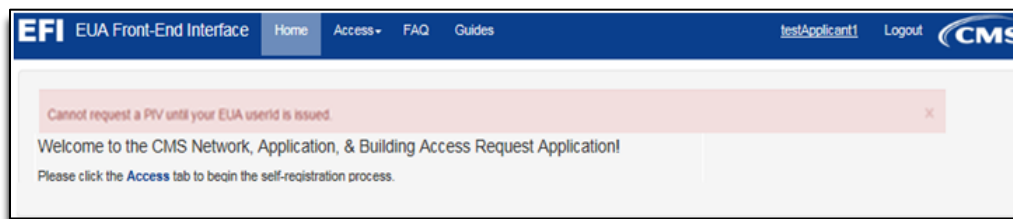
Figure 69: Existing User Request / Update PIV - Error message

If you have an existing CMS User ID in EUA, then you will be presented with the following information:

"**To submit a PIV request you must complete the HHS PIV Applicant Training at:** https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html."

3. You will need to select a Reason for Issuance from the drop-down box.

Figure 70: Existing User Request/Update PIV – Select Reason for Issuance

4. If "Other" is selected, please specify the reason in the provided text box. You are limited to 69 characters when specifying "Other".

Figure 71: Existing User Request/Update PIV – Specify "Other"

5. In the "Contract Details" section, you will be asked to answer the question "Is this your home address". If YES, then you can proceed with the following Additional Details section. If NO, you will need to fill out the Home Address required fields. To expand a section, click the + button to the left of the section header (see Appendix A for mores samples).

NOTE **The information will be provided by your Onboarding Company or Federal Approver/** COR.

6. You will need to go to the "Additional Details" section and upload required documentation based on your reason for issuance of the PIV and whether you are a Contractor or CMS/Federal Agency Employee. A link to the information is provided.

- Contractors are required to upload their PIV Training Certificate, Resume, and *signed* Declaration for Federal Employment form (OF-306) if submitting a New Application, Expired, or Other request.

- Contractors are required to upload their PIV Training Certificate and Resume if submitting an Expired request.

- Contractors are required to upload their PIV Training Certificate for Lost, Stolen, Damaged, or Name Change requests.

- Contractors are required to upload a document that validates their name change.

- Federal Agency Employees are required to upload their PIV Training Certificate.

- CMS Employees have no document upload requirements.

NOTE **You must manually sign the OF-306 before uploading the document. Digital signatures are not accepted.**

NOTE **The maximum file size of each uploaded document is 4MB.**

NOTE **If you are a contractor, please make sure you upload the required information for PIV card. We recommend saving the documents with your last name with file extension. (Examples: lastname.jpg or lastname.png or lastname.tiff or lastname.pdf)**

Figure 72: Existing User Request/Update PIV –Additional Details section where user will upload the Required Documentation

7. HPMS Business Partners will have to select a Consultant Type from the list of values. EFI will populate the Company Name and, if an association exists, the Plan Number(s) as well. You will not be able to edit these values if EFI adds them from an association.

Figure 73: Existing User Request/Update PIV–HPMS Business Partner Consultant Type Selection Drop Down

NOTE **If a user directly works for the contract number (plan number) then the option "Direct Plan Employee" can be selected in the "I am a*" dropdown.**

8. In order to save your input data and work on it at another time, click the **Save Request** button at the bottom of the form.

9. After you have completed the information request, please review it for accuracy and enter your Social Security Number (SSN) in both required fields under Personal Details section before you click the **Submit Request** button.

NOTE **The form requires you enter the SSN in the following format "xxx-xx-xxxx." Please be sure to add the dashes.**

Figure 74: Existing User Request/Update PIV – SSN field

    a. If you receive, **"Form not saved. Please correct errors and try again"** message, you will need to correct any input errors from the sections that has a red mark and then go to Personal Details section to re-enter your SSN in both required fields before you click the **Submit Request** button again in order to submit your Access Request.

NOTE **If you already entered your SSN number in both fields under Personal Details and you are ready to submit your request then click "Submit". Please do not click the Save Request button because this will remove the SSN from the second field under the Personal Details section and the required documents under Additional Details.**

10. In order to see the errors just click the **+** button to the left of each of the section header to correct them.

Figure 75: Existing User Request/Update PIV – Form not saved, Please correct errors

11. Once you have verified that all the information in each of the sections is correct then, continue with the submission of your request by clicking the **+** button to the left of the Personal Details section header to re-enter your SSN and then click the **Submit Request** button. A pop-up to sign your HHS-745 form will show. Once you have finished signing, click the **Confirm and Submit Signature** button to continue.

Figure 76: Existing User Request/Update PIV – Confirm and Submit Signature

12. At the "Confirmation of Submission" pop-up, click the **Confirm and Submit** button once you are ready to continue. Otherwise, click the **Cancel** button if you want to go back to your application request.
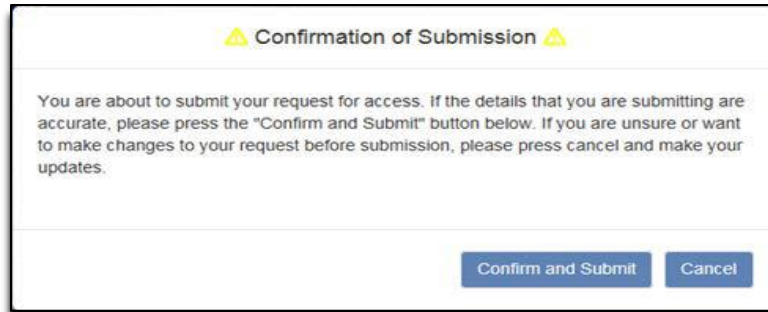
Figure 77: Existing User Request/Update PIV – Confirmation of Submission

13. You will be directed to the Status page showing a summary of your input and the status of your request.

NOTE **If you need to know the status of your request, first login to EFI (refer to <u>Login with Username/Password</u> section for steps on how to Login with Username/Password) click Access, and then click on the New User Request Menu. The request status is provided at the top of the request form. If you have further questions regarding your request, please contact your Federal Approver/COR or your point of contact from your onboarding Company.**

Figure 78: Existing User Request / Update PIV – Status

22.0   LEGAL NAME CHANGE

NOTE **If you have not previously registered for an EFI account, please reference section 11.0 Register in EFI above, for complete instructions of the EFI registration process.**

1. Log into EFI with your username and password

Figure 79: EFI Login Screen

2. From the top menu, select Access >> Existing User Request/Update PIV.
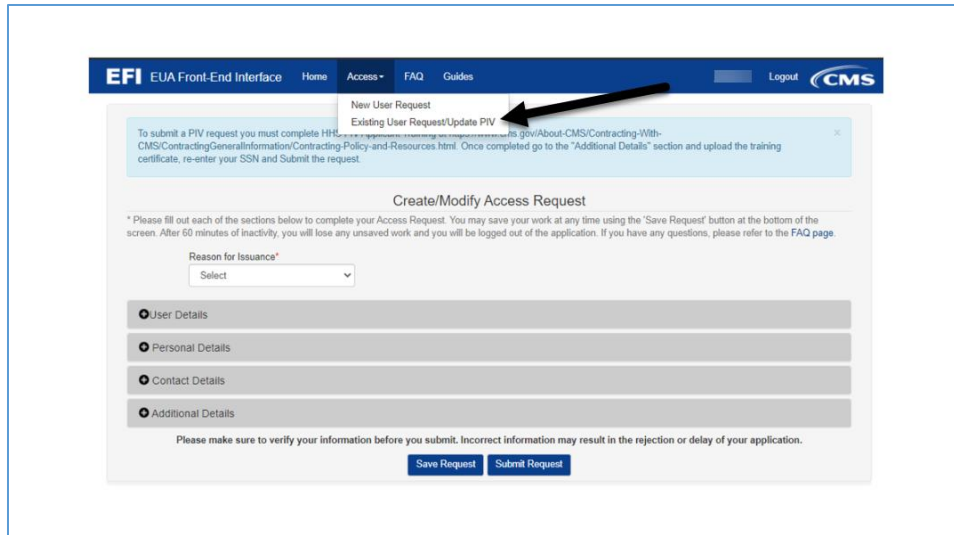
Figure 80: Create/Modify Access screen

3. Select "Name Change" in the Reason for Issuance drop down. Open each details section make updates where appropriate.
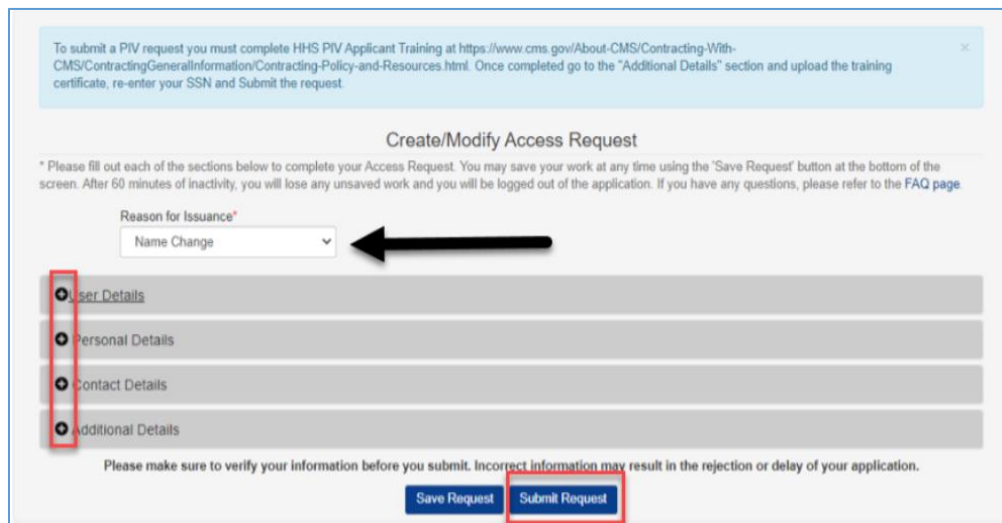
Figure 81 : Name Change screen

4. Submit the request. Once the task processes through approvals, the name and CMS email address will be updated in EUA.

23.0   ACCESS REQUEST RETURN FOR MODIFICATION

The "Access Request Return for Modification" process provides the general steps on how the user will need to review the specific section(s) in the online form, to correct any errors and then resubmit the request for approval. The user must verify each of the marked sections in red and make all the necessary corrections, based on the selected role, before submitting the request.

For a contractor, once the user re-submits the request it will be reviewed by the contract Point of Contact (POC) or a user with Approval Authority for that contract. After the POC approves the request, the form will be reviewed by the Federal Approver/Contract Officer Representative (COR) and the user will then receive an email notification.

For all other users (CMS Employee, Federal Agency, and Business Partner), once the request is submitted it will be reviewed by the Federal Approver/COR and the user will then receive an email notification.

NOTE **If the contract does not have a POC or Approval Authority assigned, then the request will be reviewed by the Federal Approver/COR and the user will then receive an email notification.**

NOTE **Please be aware that only you can see the reason for the Return for Modification in your application. Please contact your Federal Approver/COR with any questions.**

1. From the EFI login page (EUA - EFI Login Page) enter your EFI Username/Password (EFI is case – sensitive).

NOTE **Reference to Login with Username/Password section for steps on how to Login with Username / Password.**

2. Click the **Access** tab from the EFI Home page or from the EFI top menu **Access > New User Request**
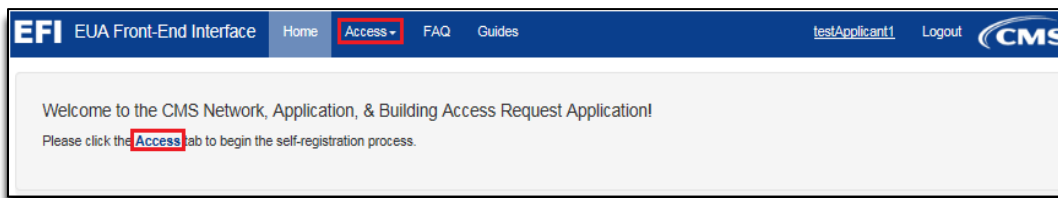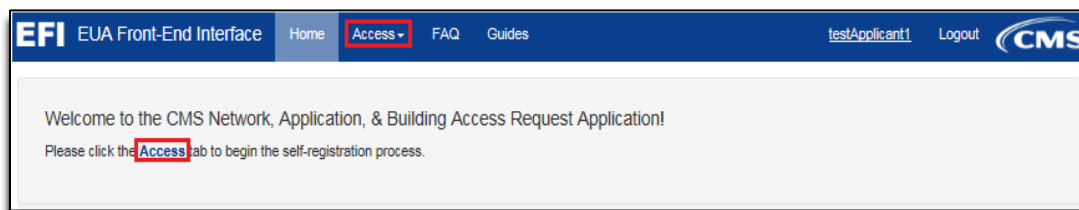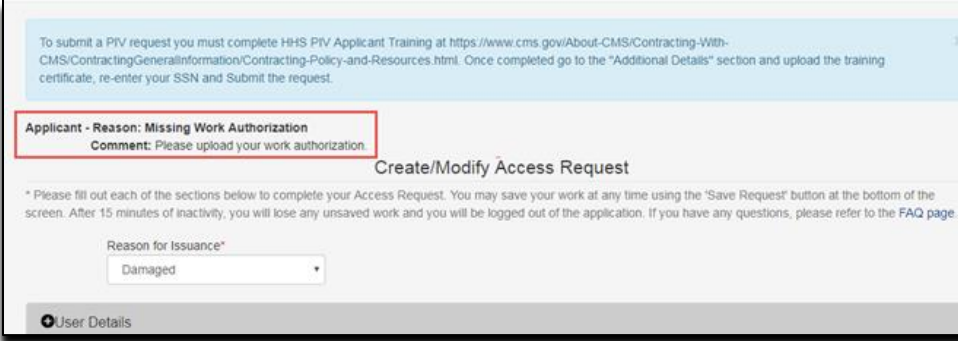

Figure 82: Access Request Return for Modification - Access Tab

Please review the form and correct any errors in the sections marked in red for User Details, Personal Details, Contact Details, Additional Details.

NOTE **The information will be provided by your Onboarding Company or CMS COR.**

3. To expand a section in order to review and correct the error (s) please click the **+** button to the left of the section header (see Appendix A for mores samples).

Figure 83: Access Request Return for Modification – Expand Error

4. Once you have updated the marked section(s) with the correct information, please review it for accuracy and enter your Social Security Number (SSN) in both required fields under Personal Details section before you click the **Submit Request** button.

NOTE **If you already entered your SSN number in both fields under Personal Details and you are ready to submit your request, then click "Submit". Please do not click the Save Request button because this will remove the SSN from the second field under the Personal Details section and the required documents under Additional Details.**

5. Create your signature then **Confirm and Submit** the request.

6. You will be directed to the Status page showing the result of your submission and the status of your request.

Figure 84: Access Request Return for Modification – Status for CMS Employee, Federal Agency & Contractor roles

23.1   Expiring Contract Notification

EFI will send a notification to you, the Applicant, and to your Approver when an approval was granted to an Access Request where the contract expires within six months.

```
From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, August 27, 2018 4:23 PM
To: Fu, Hao <hao.fu@anthem.com>; dev.r4.app11@gmail.net
Subject: Contract Expiring, No PIV Issued

Hello,

A PIV request for app11 dev.r4 of TurningPoint Global Solutions under
HHSN316201200183W:HHSM-500-2015-00138U: has been approved.
The contract expires in less than six months so a PIV cannot be issued however a
CMS ID has been generated for this applicant.


Thank you,
Enterprise User Administration (EUA)
```

Figure 85: Email Notifying Expiring Contract

Please contact your CMS COR / Federal Approver to resolve this in EFI using the EUA EFI Federal Approvers guide.

24.0   OSFLO REJECTED ACCESS REQUESTS

The OSFLO may discover an issue with your application request and return it to you for corrections. This process differs from the Return for Modification process. You should have received an email notifying you of the rejection.

1. You should have received an email notifying you of the rejection. Your Federal Approver/COR will be copied on this notification.

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, December 04, 2018 12:23 PM
To: test.r507@test.net
Cc: Approver <approver@gmail.com>
Subject: Application Rejected by OSSO Admin for: test r507

Hello test r507,

The application for test r507 has been rejected by OSSO Admin. The reason for rejection is:

Applicant -
Reason for Rejection: Missing Work Authorization
Comment: Please upload your work authorization.

If you have questions or require additional guidance as to why this request was rejected, please email DCO at ContractorRequests@cms.hhs.gov and they will be happy to help you.

Thank You,
Division Credentialing Operations

Figure 86: OSFLO-Rejected Access Request - Notification

NOTE **Occasionally, the OSFLO will find multiple issues with the request for you, or for you and your Federal Approver/COR to fix. Multiple reasons will be listed one below the other. Reasons for the Federal Approver/COR to fix will be labelled "Approver".**

2. From the EFI login page (EUA - EFI Login Page) enter your EFI Username/Password (EFI is case – sensitive).

NOTE **Reference the Login with Username/Password section for steps on how to Login with Username / Password.**

3. Click the **Access** tab from the EFI Home page or from the EFI top menu **Access > New User Request**

EFI EUA Front-End Interface   Home   Access▾   FAQ   Guides   testApplicant1   Logout   (CMS

Welcome to the CMS Network, Application, & Building Access Request Application!
Please click the Access tab to begin the self-registration process.

Figure 87: OSFLO-Rejected Access Request - Access Tab

4. Your access request will be displayed to you. OSFLO-rejected reasons will be listed at the top of the page and NOT in the body of the request as is done with Returns for Modification.

Figure 88: OSFLO-Rejected Access Request – Reason for Rejection

5. Resolve the issues and re-submit the application as described in the New User Request section. You can email the OSFLO team with any questions at ContractorRequests@cms.hhs.gov

APPENDIX A: SNAPSHOTS OF THE INFORMATION ASKED IN EACH SECTION OF THE ACCESS REQUEST FORM

The "Additional Details" section will display the required information according to the Category (CMS Employee, Contractor, and Federal Agency) and User Type (showing a few examples).

Figure 89: User Details section – Contractor

Figure 90: User Details section – CMS Employee

Figure 91: Personal details Contractor

Figure 92: Personal Details section – Foreign National Contractor

Figure 93: Personal Details section – CMS Employees Federal Agency and Business Partner

Figure 94: Contact Details section

Figure 95: Additional Details section – CMS Employee

Figure 96: Additional Details section – Federal Agency Employees

Figure 97: Additional Details section – HPMS Business Partner

Figure 98: Additional Details section – Contractor

APPENDIX B: FAQ (FREQUENTLY ASK QUESTIONS)

Please refer to the FAQ on the EFI website for other commons questions
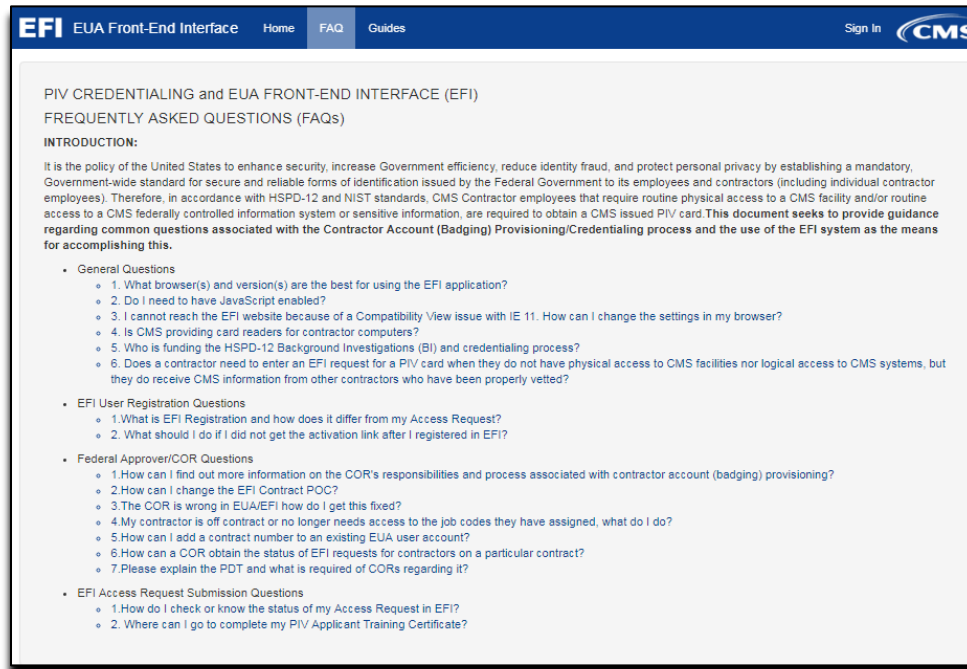
Figure 99: Welcome to the EFI Frequently Asked Questions (FAQ) Page

I cannot login in EFI it is taking me back to the HOME page

Please make sure that you are entering your EFI credentials correctly (EFI is CASE SENSITIVE) and that you are NOT using the link from the email notification that you receive from either account activation or password reset.

PIV Applicant training information

Each contractor employee who requires a CMS PIV card shall complete the HHS PIV Applicant Training, which is found at https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html. The contractor employee needs to complete the training and submit the PIV Applicant training certificate after completed the HHS-745 form properly.

I am getting EFI system errors

I am getting system errors and my EFI request cannot be submitted and stay in a loop and freezes.
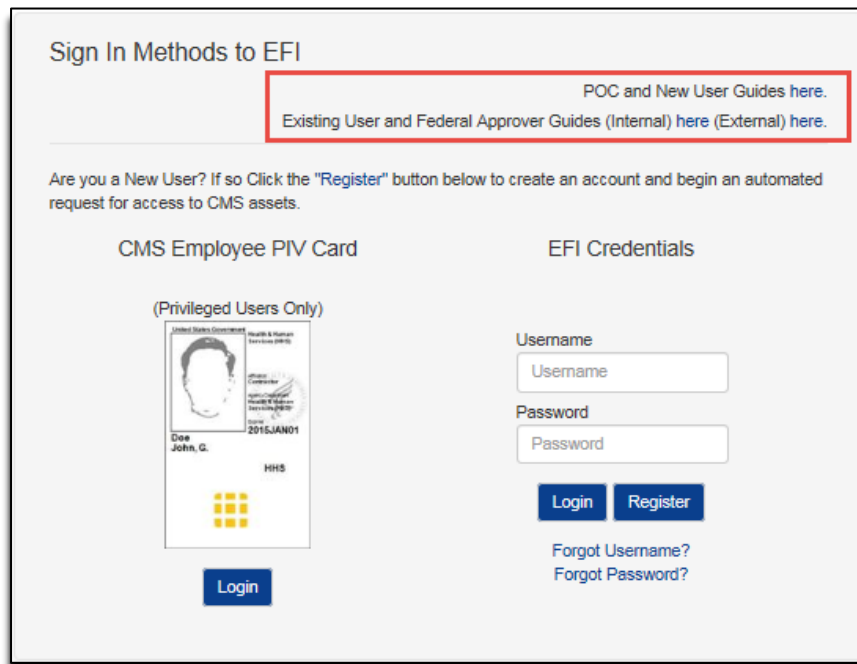
The EFI website is NOT fully compatible with Mozilla Firefox, Safari and Microsoft Internet Explorer. If you are having these issues try opening EFI in either Google Chrome v69+, or newer, or Microsoft Edge v89+ or newer.

Approval process for contractors

For a contractor once the request has been submitted, it will be reviewed by the contract Point of Contact (POC) or a user with Approval Authority for that contract **(This must be someone at the contract company)**. The POC will default to the POC of that contractor as listed in SAM.gov. After the POC approves the request, the form will be sent to the Federal Approver/Contract Officer Representative (COR) for final review and the user will then receive an email notification. If a PIV request, and once the COR approves it, the request will be sent to the OSFLO for review and final acceptance. When the OSFLO accepts the request the user and COR will receive an email notification.

APPENDIX C: WHERE TO FIND THIS USER GUIDE

This User Guide is accessible from the EFI login screen.

Figure 100: POC and User guides' link on Login Screen

This EFI User Guide is accessible to those individuals who have a EUA account. Please search in the EUA Documentation Repository

APPENDIX D: REVISION HISTORY

Table 1: Revision History

Date	Version	Description of Changes
09/27/2016	1.0	Guide for CA-EUA
03/07/2018	2.0	Updated Screenshots and combined EFI User Guide Manual
05/23/2018	2.1	Updated document for new development.
06/06/2018	2.2	Updated document for new development.
06/19/2018	2.3	Updated password change screenshots
08/10/2018	2.4	Updated screenshots and text supporting Additional Documents Need to be Uploaded feature.
9/6/2018	2.5	Added section 16.1, Expiring Contract Notification
11/14/2018	2.6	Updated document for new development adding item 8 and figure 51 for HPMS Business Partner enhancement. Also added HPMS Business Partner (figure 68) and Contractor Additional Details (figure 69) screen shots.
12/4/2018	2.7	Added section 17, OSFLO-Rejected Requests, added screenshot in Appendix A for Personal Details – Contractor – Foreign National. Added Chrome support.
4/3/2019	2.8	Added section 13.1, Update EFI Email Address, added a note for section 12.0, Forgot password, and updated screenshots in Appendix A for Additional Details section – CMS Employee – Federal Agency Employees - HPMS Business Partner. Updated Figure 51 in section 15.0, Existing User Request/Update PIV Card. Updated the URL's for EUADOCS page.
4/16/2019	2.9	Updated Password section and added View My Identity section
6/11/2019	3.0	Updated screenshots for sections 13.0 Login with Username/Password, 15.0 User Request/Update PIV card, 16.0 Access Request Return for Modification, 17.0 OSFLO-Rejected Access Requests and Appendix B: FAQ (Frequently ask questions). Added a note for 9.0 Things You need To Know Before Registering, 15.0 User Request/Update PIV card for HPMS users and for Appendix B: FAQ 0.4 Approval process for contractors.

6/25/2019	3.1	Updated screen shot showing Suffix in section 10.0 Register in EFI. Updated screenshots showing new Guides and hiding Export 745 from menu in sections 13.0 Login with Username/Password, 15.0 Existing User Request/Update PIV Card,16.0 Access Request Return for Modification, 17.0 OSFLO- Rejected Access Requests. Updated new screenshots in Appendix A.
9/4/2019	3.2	Added information in section 15.0 Existing User Request / Update PIV Card and updated a screenshot in Appendix A. Removed broken video link statement in Section 9.0.
4/8/2020	3.21	Updated EUADOCs link
8/25/2020	3.3	Added expanded EUA Info Section
12/10/2020	3.5	Added screenshots of confirmation page
6/8/2021	3.7	Added section on legal name change
8/4/2021	3.8	Updated Appendix A, 2 to specify browser compatibility.