



DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services Office of Technology Solutions

Enterprise User Administration (EUA) Users Guide

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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).

CMS.GOV Enterprise User Administration (EUA)	
Welcome to Enterprise User Administration (EUA)	Sign in Unreason
	Don't have an account
Craynald 5, 2010 (201 pre Al Biglio Asserval.	

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 '<u>EUA Info >> CAA LISTING</u>' and input your Organization (Figure 5)

For Example: if you are in "OIT"

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

earch for a user		
earch for a user 📃		4
vhere 🕀 Org Path	✓ contains ✓ OIT	😑 🕀 Search Clear
earch Results		

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)

EUA Doc's & Links
EUA Links
Documentation - USER Guide / CAA Guide / Approver Guide / Business Owner Guide / System Procedure Guide Security Awareness Training: (CBT) System Access Certification Portal: (SAC)
EUA Video Links
Password Management: Click Here
EUA Certification: Click Here
Modify Identity: Click Here
Manage My Job Code: Click Here
Create My Job Code: Click Here
What Approvers need to know about EUA: Click Here

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")

Search for a group		
Search for a group		
where 🛞 Job Code	<pre>v = v test</pre>	😑 🕀 Search Clear

Figure 7: Jobcode Search

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

Search	Results						
Select	+ Job Code	Description	Business Owner	Application	Application Maintainer	PIV Required	PW Policy
۲	test	test	uid=B9UD,ou=users,dc=cms,dc=gov uid=BAZW,ou=users,dc=cms,dc=gov uid=GTBA,ou=users,dc=cms,dc=gov	test		No	60
There a	are 1 results.						
						Select	Cancel

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).

CA Identity Governance	,				2 Full Name SAC04 (SAC04) Log Out Share my work Help
Home My Certifications Role Ma	anagement				
Home					
Certifications					Notifications
Certification/Days Due	% Complete	Complete/Pending	Total		You have 2 certifications in System Access Certification - 2016-08-04
System Access Certification - 2016-08-04 44 Days Remaining	0%	2	2	Certify 🕨	
See All					
			Ab	out	

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).

CMS.go	V System Access Certificat	tion		Full Name SAC03 (SAC03) Log Dat. [Sharing with Full Name SAC01]. Help
Home My Certification	Role Management			
Home > System Access Cen	fileation - 2016-09-09		(1) No Pending Certifications Verty Submit	All terms * Q. X
0% Complete	System Access Certification 4 Selected UnselectAl Keep Remove	- 2016-09-09		
41	l formet de la construir de la			
Days Remaining Due: 10/21/16	Full Name SAC03 4 Entitements	4 Selected	Koop Romovi More *	
Views			Default_Provisioning_Role Job Code	
User 1 Entitement 4			SAC role 1	
			SAC role 2 Job Code	
Questions? Contact the certification owner			SAC role 3 Job Code	
Copyright († 2016 CA. All rig	hts reserved 12.6.03(0120) 16.04.11			About

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).

CMS.go	System Access Certification		Phill Name SAC03 (SAC03) Log Out (Sharing with Pull Name SAC011; Help
Home My Certificat	tions Role Management		
Home > System Access Co	etdication - 2016 09-09	(T) No Pending Certifications Venty Submit	Q. ×
100% Complete	System Access Certification - 2016-09-09 This certification is complete. No further action is required at this time		
41 Days Remaining Day: 10/21/16			
Mexs		Thank you. Your extections have been submitted. × All itsms for the certification have been submitted.	
Users 0		System Access Certification - 2016-03-03	
Entitlements 0		Addom Jaker, 4 One By 100-146 or 6 Add By: Full Name 5x000	
		4 0 0	
		🖉 Approved 🔇 Rejected 😜 Reassigned	
Cuestions? Contact the certification owner		Crase Catalact Dever	
		12 operations of the	
Crowlight & 2016 CA. All r	ights reserved 12.4.05(0120) 14.04.11		About

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)

Tasks	«	View My Identity								
Home	-	Personal Details	Job Codes							
Change My Password	- 1	Identity Information								
 Modify My Job Codes Modify My Profile 	- 1	Identity Information								
Modify My Security Q 8.	- 1	User ID CAATES	T User Status Active	Communit	v 31	ID Creation Date		PIV Status		PIV E
Out Of Office Assistant	- 1	UDM	HUETO	User Cate		stam ID Assignment Dat	20180121	DW Change Date	20100416	
View ID's I Mag	- 1	orn	HHSLD	user categ	101y 3y	stem 10 Assignment Da	20100121	Pw change Date	20190410	
 View My Identity View My Poles 	- 1	Admin Code		User Cate	pory Type Te	sting Account		PW Expiration Date	20190615	
View My Submitted Tasks	- 1	Org Path PALMET	TO GBA, LLC					Project Expiration Date	B	
View My Work List	- 1									
Organizations	Φ	SAC Recert Status	OK *	CBT Recer	t Status	OK T	CBT Extension Count			
Job Code Management	÷	SAC Recert Due Date		CBT Recen	Due Date	20240131	SAC Extension Count			
EUA Info	+	SAC Recert Completio	on Date	CBT Comp	letion Date		Recert Notification Date	20181110	Recert Revoke Date 20200208	
Account Management	\$	Super Liser Revoke C	omment				Super Liser Revoked Da	te		
		Super Oser Revolue Ci					Super Oser Nevoked Su			
		User Details								
		Full Name	TEST CAA							
		Legal First Name	TEST	P	eferred Name	e TEST				
		Middle Name								
		Legal Last Name	CAA	P	eferred Last	lame CAA		Suffix	Ŧ	
		Other Names Used								
		Email	c1a2a3te4s5t@cms.hhs.gov							
		Personal Email	Seun.Lajubutu@cms.hhs.gov							
		First Approver ID	uid-1 STN out-users dc-cms dc-oov			CAA LiserTD				
		First Approver Name	Laubutu Seun			CAA Name		CAA Not Assigned		
		First Approver Final	seun lajubutu@cms.hhs.gov			CAA Email		CAA Not Assigned		
		The opposed Email	seamajabaragen almargov			serve allight		soon mos cavaigned		
		Work Details								

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)

Tasks «	1	view My Identity			
Home -	1				
 Change My Password Modify My Job Codes Modify My Profile Modify My Security O & A 		where 🛞	· · · · · · · · · · · · · · · · · · ·		
Out Of Office Assistant	II.	* Job Code	~ Description	* PIV Required	~ PW Policy
View ID's I Manage	II.	ADDE_APP	ACCESS TO WEB APPLICATION	Yes	60
View My Identity		CAA_EXTERNAL	CAA Capability in EUA for any Non-CMS CAA Only. Only the user's COR can request this through the CAA	Yes	
 View My Roles View My Submitted Tasks 	L	Default Non-CMS Employee	This is given to all NON CMS employees as a default and should never be removed	No	60
View My Work List		EFI_FED_APPROVER_PROD	This job code is for active CORs and State Mangers to approve request in EFI. Access is automatically granted to CORs.	No	365
Organizations +		GRP_ACCES_PC	Performance Center 11, application to create/execute/report performance tests (next generation of Load Runner). Anybody (CMS employees/contractors) who needs to execute performance test, browse previous results, generate reports should be given this job code.	Yes	60
Job Code Management Φ		L226-TEST3	DASH -IN THE NAME	No	
EUA Info +		test_V_User	TEST	No	
Account Management +	1				Close

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).

CMS.gov	Enterprise User Administration (EUA) and Services	Skip to main content Home System Access Certification (SAC)
Welcome BizRulezTest, Mike Tasks 4	, your are logged in as: 8173	Sign out
Name	• • Reported Exclusionary Marcolar Sectors exclusionary exclusionary	
	decordly Question 1 [Fyou could open a business, what lind would it bo?	Name (Sant)

Figure 16: Password Screen

Type in the new password and confirm. (Figure 17)

<page-header></page-header>			Skip to main content
control tendence control tendence control tendence control tendence control tendence control tendence control tendece control tende	CMS.gov	Enterprise User Administration (EUA)	Home System Access Certification (SAC)
Benefician Constraint of the state of the	Centers for Medicare & Medic	lcaid Services	
Table * Bardiel * Bardiel * Bardiel * Order, Manser Olivation * Bardiel * Order, Manser Olivation * Bardiel * Martin * Bardiel * Ward Nick * Bardiel * Bardiel * Bardiel	Welcome BizRulezTest, Mike	e , your are looged in as: BTT3	Sign out
 encoded and the second of the secon	Tasks «	Change My Password	
 Province of the state of the state	Home	the Resulted	
 1 Order Marcel Corpet 1 Order Co	Change My Password	• = Rednieg	
 * Model Control Contr	Check Password Change Status	Global Password Reset	
 and main of the second of the second and and provide your parsend do not a do not deal do fait for the second of the se	Modify My Job Codes	Bi-BulayTark Mike (BTT)	
 Oct data data data data data data data da	Modify My Security O & A	Note: The submission of this request will suprimoize your password arross all connected elatforms.	
 I with statistical st	* Out Of Office Assistant	Password Policy	
 * Version Signature Signatu	View ID's I Manage		
 • Norman State State	* View My PW Sync Status	> Cannot include your EUA UserUp and any part or your name > Cannot include any word/word portion prohibited by the defined CMS dictionary	
 * ven truit met and t	View My Submitted Tasks	> Case Sensitive	
Organization is the frage off a transit of a off a frage Direct Constrained is the frage off a frage of a frage off	View My Work List	 > Descharge of teast every so days > Password can't contain 50% characters from previous password 	
Vick Reduction Part Reduction: 	Organizations Φ	> Not be changed more than once per day	
image: the start with a start start with a start or example (>A) - A load to one volume? (>	Job Code Management 🛛 🔶	> Must include:	
- A least one numera subhetic (harsder (s-2) - A least one super San alphabetic (harsder (s-2	EUA Info 🔶	- Must start with a letter	
- A list two Lowercas alphabetic character (r=2) - A list two Lowercas alphabetic character (r=2) - Confirm Teamond Teamond - Confirm - Confirm Teamond - Confirm - Confirm Teamond - Confirm - Con		- At least one number (0-9)	
- A lead too Loppe Case adjubility duration (A.S.) - Canton		- At least one Lowercase alphabetic character (a-z)	
- Submit Presented Halds - Submit Pr		- At least one Upper Case alphabetic character (A-Z)	
		- Contrim Password Match	
Passood Confirm Confirm Passood Confirm		- RUST DE EARCHET & Characters long	
Confirm Passende *Confirm Passende *Confirm Passende *Confirm Passende *Confirm Passende *Confirm Passende *Confirm		Password	
		Confirm Password ······	
«Becordly Question 1: If you could goin a burstiene, what Mind would E be? • Adveceme to Security Question 2 ······· ······· ······· ······			
		Security Question 1 If you could open a business, what kind would it be? Answer to Security Question 1	
		Security Question 2 If you were a car, what kind of car would you be? Answer to Security Question 2	
Security Question 4 (What is the last word is your fravorite movie quests) Security Question 5 (What much did you weight in the last year of High School) Answer to Security Question 5 Security Question 5 Carryingt & 2015 CMS are Mit rights reserved.		Security Question 3 If you were a tree, what kind of tree would you be? Answer to Security Question 3	
Security Question 5 (What much did you weight in the last year of High School) Angever to Security Question 5		Security Question 4 What is the last word in your favorite movie quote? Answer to Security Question 4	
Salant Carriel		Security Question 5 What much did you weight in the last year of High School? Answer to Security Question 5	
Sachard Concel			
fageright & 2010 ONLyon Minghin Insteads.			Submit Cancel
Cargeright & 2016 (Dits year All rights reserved.			
Copyright & 2016 CHS.pvr AR rights reserved.			
Capyright © 2016 CMS.gov All rights reserved.			
		Copyright © 2016 CMS.gov All rights reserved.	

Figure 17: Password Screen: Entering the new password

Click submit, you will see the Confirmation page (Figure 18).

				Home System Access Certification (SAC) Skip to main content
CMS GOV	Enterprise User Administration (EUA)			
CM3.90V	cinterprise oser Aummistration (EUA)			
Genters for Medicare & Medic	aid 3619665			
Welcome Mike T. Test, your	are logged in as: TL17			Last Login: Sign out
Tasks	Change My Password			
Home •				
Change My Password In Multin My 20th Codes	Confirmation: Task completed.			
 Modify My Dob Colles Modify My Profile 				
Modify My Security Q & A	OK			
View My Job Codes View My Roles				
View My Work List				
	L	Copyright @ 2016 CMS.gov All rights res	erved.	



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 "<u>Modify My Security Q & A</u>" button, as illustrated in (Figure 19).

Events Under States Version Under States V	Home System Access Certification (SAC)	rtificat	tion (SAt	C) Skip to	to main cor	inte
Center Mindling & Holdening Holdenin						
Webcome Kar, Turer, your art logit hat 11/2 (Lation for any Minangi New York Naka New York Naka Naka New York Naka Naka New York Naka						
Line Line 0 - Signer R for Research				Last Lo	igin: Sig	
 C. Ourde Nik Ranzedi C. Ourde Nik Ranzedi	X					
V page high fight Change high framework Multify thy freedow Multify thy freework () 0.4. Voue high Work () 1.01	.					
	Headify My Security Q B A View My Work List					
	# construite # 1891# #888 con all studes connect					

Figure 19: Challenges Tab

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

eenc Charge My Password Charge My Password Nodifly My Bo Codes Nodifly My Profile Nodifly My Profile Nodifly My Security Q & A View My Job Codes View My Roles View My Work List	• = Required Mike T. Test (TLJ7) In order to support sell *Security Question 1	f-service password reset, you must choose a unique question for Who is your fororite Super Hero?	each of	the 5 options and your asswers c		
Clarge My Posses Modily My 360 Codes Modily My Rollie Modily My Sociating & A. View My Job Codes View My Roles View My Work List	Mike T. Test (TL37) In order to support sell +Security Question 1	f-service password reset, you must choose a unique question for Who is your fevorite Super Hero?	each of	the 5 options and your answers o		
Nacify My Profile Modify My Security Q.&.A Wow My Jab Cades View My Roles View My Roles View My Work List	In order to support sell +Security Question 1	f-service password reset, you must choose a unique question for Who is your favorite Super Hero?	each of	the 5 options and your answers o		
vlew My Job Cades vlew My Roles vlew My Work List	Security Question 1	Who is your favorite Super Hero?			annot be the same.	
			~	Answer to Security Question 1	Mighty Mouse	
	 Secantly Question 2 	What was the first musical instrument you played?	۷	Answer to Security Question 2	Triangle	
	+Security Question 3	What much did you weight in the last year of High School?	¥	Answer to Security Question 3	125	
	•Security Question 4	If you were a tree, what kind of tree would you be?	~	Answer to Security Question 4	Oak	
	•Security Question 5	If you could open a business, what kind would it be?	~	Answer to Security Question 5	Pizza King	
						Sudaret Co

Figure 20: Edit Challenge Screen

To set up the answer, the user types and retypes the response and selects "<u>Submit</u>." 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).

CMS.gov Enterprise User Administration (EUA)	
Centers for Medicaed Services	
	Sign in
Welcome to Enterprise User Administration (EUA)	Username
	Password
	STGN IN
	the second se
	OR
	Don't have an account
	Register Now
Copyright © 2010 CPE.gov All Rights Reserved.	

Figure 21: Log On Without Your Password Screen

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

		Home System Access Certification (SAC) Skip to main content
CMS OOV Enterprise User Administration (EUA)		
Centers for Medicare & Medicaid Services		
	Forgotten Password Reset: Please enter the following to identify yourself	
	• = Required	
	+User 2D	
	OK Cancel	
	Copyright © 2016 CME.gov All rights reserved.	

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).

			Home System Access Certification (SAC) Skip to main content
CMS.gov Centers for Medicare & Me	Enterprise User Administration (EUA)		
	Forgotten Password Re	set	
	- Required		
	Password Policy		
	Cranse Includes your FRAL on any workflow Crans Simulation and workflow Crans Simulation Crans Simulation House the changed manufacture of the changed manufacture	And and any paper of your channe of particul provided by the defined CHS distormy deay accelers from the provides password accelers from the provides password photoetic devector (# 2) photoetic devector (# 2) constraints long	
	User ID	71.27	
	First Name	Milce	
	Last Name	Test	
	Password		
	Confirm Password		

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: <u>Job Code List</u>
- 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)

Modify My Job Codes: Confirmation		
Confirmation	My Job Codes	Justification
• = Required		
This task will Modify a User's Job Code List. This provides the ability to connect or disc	connect job codes in the same submitted tas	task.
Warning:It is possible to delete some or all of your current access (job codes). If you 6.0 Managing Additional Access. Link to the EUA Documentation Repository can be fou	un-check any job code(s) a disconnect req und HERE.	equest to remove the job code will occur. Please review the EUA-EFI User Guide Section
By adding a checkmark in the box next to Confirmation, you state that you have read	and understand the process of Modifying a	a User's Job Code List.
•Confirmation 🗹 (Required)		
		Next Cancel

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.

odify My Job Codes: My Job Codes						
Error: [Confirmation:Confirmation] Attribute Confirmation is required.						
	Confirmation	My Job Codes	Justifica	ition		
where 🕀	✓ = ✓ *	G ⊕ Search Clear				
Member	- Job Coare	* Description	• PIV Required	• PW Policy		
1	AAAA_CHOO	Sneezy				
~	ABC Testing	i need to learn my abcs				
√	ABC Testing EUA Admins	i need to learn my abcs Super User Administrator				
X X	ABC Testing EUA Admins EveryOneLovesPizza	i need to learn my abcs Super User Administrator Pizza is great				
¥ ¥	ABC Testing EUA Admins EveryOneLovesPizza SAC Temporarily Extending System Access	i need to learn my abcs Super User Administrator Pizza is great To access the SAC Temporarily Extending System Access task				
y y y	ABC Testing EUA Admins EveryOneLovesPizza SAC Temporarily Extending System Access System Access Due on Email	i need to learn my abcs Super User Administrator Pizza is great Pizza is great Pizza is creat Dirac state SAC Temporarily Extending System Access task To receive emails for users with no email for System Access Certification				
X X X X	ABC Testing EUA Admins EveryOneLovesPizza SAC Temporarily Extending System Access System Access Due on Email Test Workflow Approvers	i need to learn my abcs Super User Administrator Pizza is great To access the SAC Temporarily Extending System Access task To receive emails for users with no email for System Access Certification Demo WF approvers				

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 <u>disconnect</u> 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.

Manage Job	Codes: Job Code	s		
	1 Јођ С	odes 2 Justification		
where 🏵		> = , *		
Member	* Job Code	* Description	• PIV Required	• PW Policy
	Default Non- CMS Employee	This is given to all NON CMS employees as a default and should never be removed	No	60
	SCMS	Smart Card Management System- SCMS job code initiates the PIV provisioning process by creating a user record in the HHS SCMS server. Once invoked, the job code cannot be removed. Use of PIV cards is mandated in HSPD12, and enforced by Department of Homeland Security.	No	365
Add a Job Return to Sear	Code rch		Next	Cancel

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)

Manage	nage Job Codes: Job Codes						
1 Job Codes				2 Justification			
Job	Code						
Sear	rch for a group						
Sear wher	ch for a group re 🕀 Job Code		✓ starts with ✓ test_j) 🔿 🚯 Search Clear			
Sear	rch Results						
Sele	ct * Job Code	* Description	* Provisioning Roles	* AdminGroup Admins	* PIV Required	* PW Policy	Application Maintainer
	Test_Job_Code	Testing	Base_UNIX-LDAP[PROD]	cn=CAA_ACCESS,ou=Job Code,dc=cms,dc=gov	No	60	MANAS.BOJANNA2@ANTHEM.COM
There	There are 1 results.						
							Select Cancel

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.

Manage Job	Manage Job Codes: Job Codes					
	1 Job	Codes 2 Justification				
where 🕀		y = y * @ Search Clear				
Member	* Job Code	* Description	* PIV Required	* PW Policy		
	Default Non-CMS Employee	This is given to all NON CMS employees as a default and should never be removed	No	60		
	SCMS	Smart Card Management System- SCMS job code initiates the PIV provisioning process by creating a user record in the HHS SCMS server. Once invoked, the job code cannot be removed. Use of PIV cards is mandated in HSPD12, and enforced by Department of Homeland Security.	No	365		
	Test_Job_Code	Testing	No	60		
Add a Job Return to Sea	Code arch		Next	Cancel		

Figure 29: Requested and Awarded Job codes

You will now need to enter the justification. Once the justification is entered, click finish (Figure 30).

			Home System Access Certification	(SAC) Skip to main content
CHIS CON	Enteraries User Administration (EUA)			
CM3 .90V	Enterprise user Administration (EOA)			
Centers for Medicare & Med	dicaid Services			
and some with the second some	and the second framework in the			
Welcome Mike 1. Test, you	ar are logged in as: 107			Last Login: sign out
Tasks u	Hodiny My Job Codes: Profile			
Home	Groups		Profile	
 Change My Password Modify My Job Codes 				
Modify My Profile	• = Required			
Hodify My Security Q & A				
 View My Job Codes View My Roles 	Justification Reason			
View My Work List	Testing	0		
			Bas	tk Finish Cancel
		Copyright © 2018 CMC.gov All rights reserve	red.	

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)

C 145	Home System Access Cert	fication (SAC) Skip to main content
Centers for Medicare & Medica	/ Ltterprise User Administration (EUA) dicad Services	
Welcome Mike T. Test, your	our are logged in as: TLJ7	Last Login: Sign out
Tasks	Ilome	
Change My Pasaword Modify My Job Codes Modify My Job Codes Modify My Profile Modify My Security Q & A View My Job Codes	 ▲ ▲ ▲ 	
View My Roles View My Work List	Change Hy Password Modify Hy Job Codes Modify Hy Profile Modify Hy Security Q & A View Hy Work List	
	Copyright ⊕ 2016 CH5.gov All rights reserved.	



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 submenu 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).

		Home System Access Certification (SAC) Skip to main content
CHIS GOV	Entermies Hear Administration (E1A)	
CM3.gov	cherphise user Auministration (coA)	
Centers for Medicare & Medi	caid Services	
Welsons Miles 7, Test		Last Laster & Class and
Taska //	and any proving as 102	Case organ. I sign out
Nome	MOUNT MY SUDA CARESS AN OUDS	
 Channa Mr Bassword 	Groups Profile	
 Unange Hy Kaseword Modify Ny Job Codes 		
Modify My Profile	internet and additional Constant Clear	
 Modify My Security Q & A View My Job Codes 		
View My Roles	Member - Joh Cada - Description	
View My Work List	✓ 1226TEST 000TES	
	Add a Job Code	
		Next Cancel
	Copyright © 2016 CM5.gov All rights reserved.	

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)

		Home System Access Certification (SAC) Skip to main content
CHIC CON	Fatamias Bass Identiciates (CDI)	
CM3.gov	Enterprise User Administration (EUA)	
Centers for Medicare & Med	licaid Services	
Welcome Mike T. Test, you	ar are logged in as: TLI7	Last Login: Sign out
Tasks 4	Modify My Job Codes: Profile	
Home -		
Change My Password	Groups	Profile
Modify My Job Codes		
Modify My Profile	• = Required	
Hodfy Hy Security Q & A		
 View My 300 Codes Merc My Balan 	Justification Reason	
View My Work List	Testing	^
	1	V
		Back Elaids Cancel
		UCCK FERDIN CONCC
	1	Copyright © 2016 CHS.gov All rights reserved.

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.

	Home [System Access Certification (SAC) Skip to main content						
CMS.gov Enterprise User Administration (EUA)							
Centers for Medicare 6. Medicaid Services							
Welcome Mike T. Test, your	are logged in as: TU7 Last Login: Sign out						
Tasks	Nodify My Job Codes						
Home -							
Change My Password							
Modify My Job Codes	u Alert: Lask pending.						
Modify My Profile							
Modify My Security Q & A E View My Job Coder							
View My Roles							
View My Work List							
	Countight © 2010 CHS.gov All rights reserved.						



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)

					Home System Access Certification (SAC) Skip	p to main content
CMS dov	nternrise User Administration (FUA)					
CM3.gov	Interprise oser Automistration (LOA)					
Centers for Medicare & Medica	id Services					
Walcome Mike T. Test, your 1	tra logged in as: 1117				Last	Loolou I Sinn out
Tasks a	Madify My Profile				CHP.	cogni (
Home						
> Charge Mr.B. mond	Last Lotin					
Modify My Codes	Last Surressful Lonon 09/27/2016 at 14:59:00					
Modify My Profile	Failed Login Attempts					
 View Ny Job Codes 	User ID	TL37	User Status	Active	Admin Code	
> View My Roles						
View My Submitted Tasks	User Category	Not Defined	User Category Type	Not Defined	Organization users	
Account Management	Position/Title		DOB	1982-01-30		
	Local First Manua	Miles	Deeferred First Mana	Miles		
	Legal First Name	rike	Preferred Pirst Name	Pine		
	Middle Name	т	Other Names Used			
	Legal Last Name	Test	Preferred Last Name	Test		
	Full Name	Mike T. Tert				
		THE T. LEW				
	Work Email	michael mccoufficms bhs one	Managar	No		
	Work Phone	410-786-7800	Work Phone Ext			
	Personal Phone		Personal Mobile			
	Second Freed	miles test12@test.com				
	Personal eman	mike.test13@test.tom				
	Birth Country	US	Birth Province/State	MD	Birth City Baltimore	
	U.S. Citizen	Yes	Number Of Years In US			
					Subs	nit Cancel
JI		Cepyrig	ht @ 2018 CMS-prv All rights	reserved.		

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".

		Skip to main content
Centers for Medicare & Medicaid Services	s Validation	Home System Access Certification (SAC)
Welcome CAA TEST, your are logged in	as: TONH	Sign out
Welcome CAT EET, you are logated in Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks Tasks	as 1099 Solanitied tasks relation as performed by Tak D equals relation and the second of the seco	Sign out
	Copyright © 2016 CMS.gov All rights reserved.	

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**)

The contract of the second sec							
0383	Vie	w My Submitted Tasks					
iome -	-			In the second		1	The second s
Change My Password Modify My Job Codes Modify My Profile		* Description	- status	Priority	* Submitted	Last Updated	Last Operation
	1	CAA Reset Identity Password task, User TROY	Completed	Medium	PM	9/13/2016 2:03 PM	Task completed.CAAResetIdentityPassword - Policy PX-6001C-Sets Identity_Password_T0_Deta evaluated
Modify My Security Q & A View My Job Codes	1	Delete Identity task, User EO30	Cancelled	Medium	9/13/2016 1:54 PM	9/13/2016 1:55 PM	Attempting to cancel.
View My Submitted Tasks	1	Manage Job Codes task, User EOJO	Completed	Medium	9/13/2016 1:48 PM	9/13/2016 1:48 PM	There was no workflow process mapped to this task.
rganizations +	1	Manage Job Codes task, User EOJO: Failed: 1 events	Failed	Medium	9/13/2016 1:47 PM	9/13/2016 1:47 PM	There was no workflow process mapped to this task.
ccount Management +	1	Revoke Identity task, User EL7Q	Completed	Medium	9/13/2016 1:43 PM	9/13/2016 1:43 PM	Validate On Submit:RevokeIdentity - Add Action 'PX-4999-A1-2_Update User Status' performed
	1	Change Sirst Approver task, User MJVK	Completed	Medium	9/13/2016 1:38 PM	9/13/2016 1:38 PM	Task completed:ChangeFirstApprover - Policy 'PMX_Notify First Approver Change' evaluated
	1	Yor y Identity task, User TRG2	Cancelled	Medium	9/13/2016 1:32 PM	9/13/2016 1:41 PM	Attempting to cancel.
	1	Create Identity task, User TJRU	In progress	Medium	9/13/2016 1:21 PM	9/13/2016 1:21 PM	Validate On Submit:CreateIdentity - Add Action '9X-4000-A2-1_Set UID Attribute' performed
		Rehindrichen					Clear

Figure 39: View Submitted request

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

			Home S	stem Access Certification (SAC) Skip to main content						
CHS dov	Enterprise Llear A	dministration (EUA)								
CM3.gov	cillerprise User A									
Centers for Medicare & Medic	aid Services									
Welcome CAA TEST, your a	re logged in as: TON	24		Last Login: Sign out						
Tasks «	Create Identity	/ Task Details: TJRU		· · · · · · · · · · · · · · · · · · ·						
Home -										
Change My Password	Subject name	TJRU (Mike Testing)								
Modify My Job Codes Modify My Drofile	Task performed	d by TONH (CAA TEST)								
Modify My Security Q & A	Task creation t	Tuesday, September 13, 2016 1:15:09 PM EDT								
View My Job Codes	Task status	In progress								
 View My Roles View My Submitted Tasks View My Work List 	Initiated Tasks These tasks we	re created as part of initiating this task, and began executing immediately.								
Organizations ϕ	No results.									
Account Management 🛛 🔶	Bernardalte Ter									
	These tasks mu	st complete before this task can begin executing.								
	Also secultar									
	NO results.									
	Subsequent Tas	ks I bagin executing after this tack has completed								
	These casks will	begin executing arter this task has completed.								
	No results.									
	Task History									
	* Source	* Description	* Time							
	POLICYXPRESS	Validate On Submit:CreateIdentity - Policy 'PX-4000 Generate Unique ID for User Accounts' evaluated	2016-09-13 13:21:52.0							
	POLICYXPRESS	Validate On Submit:CreateIdentity - Rule 'PX-4000-A2 Assign UID' was evaluated	2016-09-13 13:21:52.0							
	POLICYXPRESS		2016-09-13 13:21:53.0							
	POLICYXPRESS	PIV_Not_Needed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1231-1-A2.1 Set Email Variable' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1231-1-A2.2_Set Badging' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1231-1-A2.3_Set UPN Variable' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1231-A2.1_Set Employee Type' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1232-A5.1_Update PIV Status' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1232-A5.2_VST Message' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1232-A5.3_Go to Final Processing' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Add Action 'PX-1237-A1.1_Set Message' performed	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Policy 'PX-1231_Set SCMS Employee Type' evaluated	2016-09-13 13:21:53.0							
	POLICYXPRESS	Submission:CreateIdentity - Policy 'PX-1231-1_Set SCMS Values' evaluated	2016-09-13 13:21:53.0	~						
		Copyright © 2016 CMS.gov All rights reserved.								

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 "<u>Modify My Profile</u>" 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 <u>EFI New User Guide</u> 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 (<u>EUA - EFI Login Page</u>).



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.

Please Sign Up)
lf you already have a	n EFI account please do not register again. You will need to use your original EFI username to login.
Do you already have a	CMS USERID?*
CMS USERID*	SSN (xxx-xx-xxxx)*
CMS User Id	X00X-XX-X0X
	Sign up
	Already have an account? Sign In

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 prepopulates 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.

Enter your username, password and c	onfirm your password then click	"Sign Up".		
Note: If the email address associated v address to notify you about updates to	with your EUA account is no long o your request.	per valid then enter a corre	ct email address and reenter it when prompted. EF	I will use this email
Your CMS User Id : A1E8				
EFI Usemame*	EFI Passw	ord*	Confirm EFI Password*	
EFI Username	EFI Pas	sword	Contine EFI Paseword	
Legal First Name*	Legal Last	Name*	Suffix	
Egypt	Unicom		Select	×
Email*		Confirm Email*		
egypt unicom@cms hhs.gov		egypt unicom@cms hhs.gov		
	Sign up	1		
		4.		

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

request for a PIV.	
Sign In Methods to EFI	
	POC and New User Guides her
Existing User and Fe	deral Approver Guides (Internal) here (External) her
Are you a New User? If so Click the "Register" buttor request for access to CMS assets.	n below to create an account and begin an automate
CMS Employee PIV Card	EFI Credentials
(Privileged Users Only)	
And	Username
	Usemame
	Password
Dee Jons, G.	Password
	Login Register
	Forgot Lisemame?
and the second se	Forgot Password?
Login	Unlock Account?

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.

The provided CMS ID and SSN are not found. Please verify your CMS ID and SSN. If they are correct please contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact tends to contact the Help Desk at 1-800-562-1963 or weak tends to contact tends
Please Sign Up
If you already have an EFI account please do not register again. You will need to use your original EFI username to login.
Do you already have a CMS USERID?* (● Yes ○ No
CMS USERID* SSN (xxx-xx-xxxx)* gvd6 X Sign up

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.

You already have an account in EFI. Please login by using your EFI credentials or recover your login information using the Forgot Username/ Forgot Password links below. Parget Username/ Parget Recovered?
Please Sign Up
If you already have an EFI account please do not register again. You will need to use your original EFI username to login.
Do you already have a CMS USERID?* ● Yes ○ No
CMS USERID* SSN (xxx-xxx-xxxxxx)* gvd6j x Sign up

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.

Recover Username	3
Legal First Name	EFI
Legal Last Name	Applicani21
	Please select an identity verification method and enter the information in the space provided.
	CMSID TODB
	Recover Username
This site is best viewed with IE 9- © 2018 CMS.	+ 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

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: <u>eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]</u> Sent: Monday, April 17, 2017 2:21 PM
To: Applicant21, EFI < <u>efi.applicant@testing.com</u> > Subject: EFI User Recovery
Hello EFI Applicant21,
Your EFI username is efi.applicant21
Please log into $\underline{\text{EFI}}$ 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.

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

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</ae00173@wellpoint.com>
Hello TotolFirst TotolLast,
Your EFI username is totol
Please log into \underline{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 V Jane doe@gmail.com ×
	Recover Username
This site is best viewed with IE 9+ © 2018 CMS.	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

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 (<u>EUA EFI Login Page</u>). 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.

Username	TestCasePwd
Email	liz.alvarado@anthem.com
	Recover Password

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:



Figure 54: Forgot Password - EFI Password Reset Email

3. Reference <u>Reset Password</u> 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 (<u>EUA EFI Login Page</u>).
 - 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.

User Name User Name Email Email	Unlock Account		
Email	User Name		
Email	Email		
	Email		

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.

cuvate Account		
ser Name		
username		
mall		
Email		

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 (<u>EUA - EFI Login Page</u>) enter your EFI Username and Password under the **EFI Credentials** section and then click the **Login** button.

EFI Credentials	
Username (case-sensitive) Username	
Password Password	
Login Register	

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.

Account Details
Full Name: Daugh Tim
Username: testApplicant1
Email: testApplicant1@gmail.com Change Email

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.

Fmail		
Email		

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 <u>Forgot Password</u> 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.
- Refer to the <u>Forgot Password</u> 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</jane.doe@gmail.com>
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.

Usemame	JonDoe1		
New Password	•••••		
Confirm New Password	•••••		
	Chappe Password		

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.

Change Password	I
😵 - At least one Upper Case	alphabetic character (A-Z)
At least one Lowercase a	lphabetic character (a-z)
Password must be between the between th	en eight and twenty-four characters long.
Onfirm Password Match	
Current Password	
New Password	
New Password	
Note:	Password must contain at least one special character (i.e.; !,@,#,\$,%,^,&,*,etc.). Password must contain at least one lowercase letter. Password must contain at least one uppercase letter. Password must be between eight and twenty-four characters long.
Confirm New Password	
Confirm Password	
	Change Password Cancel

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.

Account Details			
Full Name: bogus fiftyfive			
Username: hao.poc			
Email: nageswararao.yarra@anthem.com Change E	nail		
Password: Change Password			
Security Questions: Set Security Questions			
Email Approval Authorities: Manage Authorities			
Roles:			
EFI Point of Contact			
EFI Regular User			

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.

urity Question 1*	Answer to Security Question 1*
elect ~	*****
letect tow much did you weigh in your last year of High School? you could open a business, what kind would it be? you were a car, what kind of car would you be? you were a tone what kind of tree would you be?	Answer to Security Question 2*
If you were a lice, what know of the woolung you be? What is the last five digites of your drivers licence number? What is the last word in your favorite movie quote? What is the name of a college you applied to but didnot attend? What is your failline frequent filtyer number? What is your failine frequent filtyer number? What is your anatemal grandmothers malden name? What is your spouse or partners mothers malden name? What was the first book you read? What was the first movie you remember seeing? What was the first movie you remember?	Answer to Security Question 3*
	Answer to Security Question 4*
	Answer to Security Question 5*

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 (EUA - EFI Login Page) 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: <u>https://www.cms.gov/About-CMS/Contracting-With-</u> CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html."

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

To submit a PIV request you must complete HHS PIV Applicant Training at https://www.cms.gov/About-CMS/Contracting-With- CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html. Once completed go to the "Additional Details" section and upload the training certificate, re-enter your SSN and Submit the request.	×	
Create/Modify Access Request		
* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ place and the screen and the screen and the screen and the screen are screen as the sc	age.	
Select New Application Renewal Lost Stolen Damaged Expired Name Change Other		
Additional Details		
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application. Save Request Submit Request		

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".

To submit a PIV request you must complete HHS PIV Applicant Training at https://www.cms.gov/About-CMS/Contracting-With- CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html. Once completed go to the "Additional Details" section and upload the training certificate, re-enter your SSN and Submit the request.		
Create/Modify Access Request		
* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.		
Reason for Issuance* Specify (if Other)* Other Specify (if Other)		
OUser Details		
Personal Details		
Contact Details		
Additional Details		
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application. Save Request Submit Request		

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 <u>Appendix A</u> 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)

Crea	te/Modify Access Request
* Please fill out each of the sections below to complete your Access Rescreen. After 15 minutes of inactivity, you will lose any unsaved work and	quest. You may save your work at any time using the 'Save Request' button at the bottom of the nd you will be logged out of the application. If you have any questions, please refer to the FAQ page.
Reason for Issuance*	
Select	
Ouser Details	
Personal Details	
Contact Details	
Additional Details	
Applicant can access the required documentation and tra Reminder: The OF-306 must have a wet signature. Digit	aining by clicking on th <mark>is <i>link</i>.</mark> tal signatures are not allowed.
Upload PIV Training Certificate [®] Browse (File types: pdf, docx, jpg, jpeg, tiff, tif, png)	Current Document EFIRequirementsRelease3.docx
Upload Resume* Browse (File types: pdf, docx, jpg, jpeg, tiff, tif, png)	Current Document
Upload Signed Declaration for Federal Employment Form - OF-306* File types: pdf, docx, jpg, jpeg, tiff, tif, png)	Current Document
Upload Other Document Browse	Current Document
(File types: pdf, docx, jpg, jpeg, tiff, tif, png)	
Username (4-7 alphanumeric)	
CMS Region/Facility*	
Select	
Start typing your contract number below.	
Contract Number*	Contract Mod
Contract Number and Order	Mod
Please make sure to verify your information before you	submit Incorrect information may result in the rejection or delay of your application
Frease make sure to verify your information before you	ave Request Submit Request

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.

Upload Other Document Brows (File types: pdf, docx, jpg, jpeg, tiff	Current Document	
CMS Region/Facility		
Select		
I am a* Bid Consultant		
Company Name*	Plan Number(s) (e.g., h0001,10000)*	
BID CONSULTING	h0002.24022.55532	

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.
- 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.

•••••		
onfirm (xxx-xx-xxxx	:)*	
VVV VV VVVV		

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.

	Create/Modify Access Request	
Please fill o creen. After	ut each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.	
O User I	Jetails 0	
	Category* Select	
	Request Justification	
	Justification	
O Perso	nal Details 0	
O Conta	ct Details	
C Additi	onal Details \rm 0	

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.

EFI EUA Front-End Interfa	ICE Home Access - Export 745 FAQ	bogus.test15	
	🛆 Create Signature 🛆 🛛 🛛		
To submit a PIV request you must CMSVContractingGeneralinformati certificate, re-enter your SSN and	I hereby authorize the release of information in this application to appropriate Federal agencies for the purposes of processing this application and verifying my identity. I also acknowledge that if I knowingly provide or assist in the provision of false information or non-verifiable information, and/or I purposely omit information, it could result in loss of access to HHS facilities and IT systems and in disciplinary action including removal from Extension or 2 Ederard contract, and may be unblicht fornessention under	in and upload the	* training
* Please fill out each of the sections t screen. After 60 minutes of inactivity.	applicable Federal criminal and civil statutes.	equest' button at Jestions, please r	the bottom of the efer to the FAQ page.
User Details			
Personal Details	Bon Tools		
• Contact Details			
Additional Details	To sign, move the mouse pointer into the "box" and click and hold down the right mouse button. Releasing the right mouse button stors writing.		

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</u> <u>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.

Status EFI Pending POC Approval
Additional Information
Company: ENTERPRISE SERVICES LLC
Contract Company: ENTERPRISE SERVICES LLC Contract Number: HHSN-316-2012-00026W:HHSM-500-2017-00007U:
Contract Address:
13600 EDS Dr A3S-B53 A3S-B53 Herndon, VA null
Desired EUA Username: SBWILEY
CMS Region: CO (CENTRAL) Central Office
Access Document(s):
Training Certificate: PIV Certificate - Signed.pdf
Point of Contact (POC):
Logical Sensitivity: Escort Only
Risk Level: Low

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

Sign In Methods to EFI	POC and New User Guides here
	Existing User and Federal Approver Guides here
Are you a New User? If so Click the "Register" but request for access to CMS assets.	tton below to create an account and begin an automated
CMS Employee PIV Card	EFI Credentials
(Privileged Users Only)	
United Harrs Government Institute (HHS)	Username
	Username
Comment Sector States Tended States	Password
Doe 2015JAN01	Password
John, G. HHS	L
	Login Register
	Forgot Username?
Login	Forgot Password?
Login	Uniock Account?

Figure 79: EFI Login Screen

2. From the top menu, select Access >> Existing User Request/Update PIV.

	Front-End intenace	Thanio	Access-	TAG	Guides	Logou	(CM
			New User	Request			
To submit	a PIV request you must co	mplete HH	Existing U	Iser Requ	est/Update PIV	ntracting-With-	
CMS/Con certificate	tractingGeneralInformation , re-enter your SSN and St	/Contracting	Policy-and-l quest	Resource	html. Once completed go to the "Additio	onal Details" section and upload the training	
				Create	/Modify Access Request		
* Please fill	out each of the sections be	ow to comp	lete your Acc	ess Requ	est. You may save your work at any time	using the 'Save Request' button at the bottom of t	the
screen. Alte	r 60 minutes of inactivity, ye	iu wili lose a	iny unsaved	work and	ou will be logged out of the application. I	It you have any questions, please refer to the PAC	2 page.
	Reason for Issuance*						
	Select		×				
OUser I	Details						
-							_
O Perso	onal Details						
O Conta	act Details						
O Addit	ional Details						
	Please make sure to verif	y your info	rmation befo	re you si	bmit. Incorrect information may result	t in the rejection or delay of your application.	_
				Sav	e Request Submit Request		

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.

To submit a PIV request you must complete HHS PIV Applicant Training at https://www.cms.gov/About-CMS/Contracting-With-CMS/Contracting-GeneralInformation/Contracting-Policy-and-Resources.html. Once completed go to the "Additional Details" section and upload the training certificate, re-enter your SSN and Submit the request.
Create/Modify Access Request
* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 60 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.
Reason for Issuance*
Name Change
ser Details Personal Details
O contact Details
O Additional Details
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application. Save Request Submit Request

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 <u>Login with Username/Password</u> section for steps on how to Login with Username / Password.**
- 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 <u>Appendix A</u> for mores samples).

			Create/Modify	Access Request	
ease fil	out each of the sections below	w to complete y	our Access Request. You may	save your work at any time using the 'Save Reques	" button at the bottom of the
oen. Afb	er 360 minutes of inactivity, yo	u will lose any u	unsaved work and you will be I	ogged out of the application. If you have any question	ns, please refer to the FAQ page
O User	r Details				
	Category*		Type*		
	Contractor	V	MAC	~	
	Request Justification				
	for validation testing				
Port	conal Details				
	sumali prevalna				
Cont	tact Details				
Add	tional Details 🔒				

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- Anao.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.



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



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.

To submit a PIV request you must com CMS/ContractingGeneralInformation/C certificate, re-enter your SSN and Sub	plete HHS PIV Applica Contracting-Policy-and-f mit the request.	nt Training at https://www.cms.gov/About-CMS/Contracting-With- Resources.html. Once completed go to the "Additional Details" section and upload the training
Applicant - Reason: Missing Work Aut Comment: Please upload yo	horization ur work authorization.	Create/Modify Access Request
* Please fill out each of the sections below screen. After 15 minutes of inactivity, you	w to complete your Acc will lose any unsaved	ess Request. You may save your work at any time using the 'Save Request' button at the bottom of the work and you will be logged out of the application. If you have any questions, please refer to the FAQ page
Reason for Issuance* Damaged		
OUser Details		



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

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).

		Create/Modify Access Request
* Please fill out screen. After 15	each of the sections below to complete 5 minutes of inactivity, you will lose any	e your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.
ļ	Reason for Issuance*	
	Select	
OUser Det	ails	
	Category*	Type*
	Contractor 🗸	IT Development and Support Contractors
	Request Justification	
	Justification	
Persona	I Details	
 Contact 	Details	
Addition	al Details	
Ple	ase make sure to verify your inform	ation before you submit. Incorrect information may result in the rejection or delay of your application.
		Save Request Submit Request

Figure 89: User Details section – Contractor

	Create/Modify Access	Request	
* Please fill out each of the sections below to comp screen. After 15 minutes of inactivity, you will lose	lete your Access Request. You may save you any unsaved work and you will be logged out	r work at any time using the 'Save Request' button at the bottom of th of the application. If you have any questions, please refer to the FAQ	ne page.
Reason for Issuance*			
Select	~		
OUser Details			
Category*	Туре"	Entrance on Duty	
CMS Employee	Select	mm/dd/yyyy	
Request Justification			
Justification			
Personal Details			
Contact Details			
C Additional Details			
Please make sure to verify your info	rmation before you submit. Incorrect infor	nation may result in the rejection or delay of your application.	
	Save Request Submit	Request	

Figure 90: User Details section – CMS Employee

Perso	nal Details						
	Legal First Name*		Middle Name	Legal Last 1	Name*		
	Enter text here		Middle Name	Enter text	here		
	Date of Birth*		Other Names Used			Suffix	
	mm/dd/yyyy		Other Names Used			Select	~
	Birth Country*		Birth City* Enter text here		Birth State*	re	
	Company/Organization*	Position/Tit	le•				
	Enter text here	Enter tex	t here				

Figure 91: Personal details Contractor

Please fill out each of the sections to creen. After 15 minutes of inactivity,	elow to complete your A you will lose any unsave	ccess Requed work and	est. You may a you will be log	ave your work ged out of the	at any time us application. If y	ing the 'Save ou have any	Request button questions, please	at the bottom of the refer to the FAQ	e page.
OUser Details									
• Personal Details									
Legal First Name*			Middle Name		Legal Last Na	ame*			
Enter text here			Middle Na	ne	Enter text h	here			
Date of Birth*			Other Name	Used			Suffix		
🗰 mm/dd/yyyy			Other Nam	es Used			Select	~	
U.S Citizen?*			Are you a Pe	rmanent Resid	dent?*				
🔿 Yes 📓 No			O Yes O	No					
Citizenship*				Years In US	of past 5*				
Select			~	Select		~			
SSN (xxx-xx-xxxx)*	١	/Isa #		Allen Registr	ation #		Work Permit #	:	
•••••									
Confirm (xxx-xx-xxx	x)*								
XXX-XXX									
Birth Country*			Birth City*			Birth State*			
Select		~	Enter text	here		Enter text	here		
Company/Organizat	ion* F	Position/Title	r						
Enter text here		Enter text	here						
Required Document	ation can be found here								
Upload Document*			Current Doci	ument					
(File types: pdf, doc	Browse k, jpg, jpeg, tiff, tif, png)								
Contact Details									
Additional Details									

Figure 92: Personal Details section – Foreign National Contractor

enal First Name*						
egar ritor Name		Middle Name	Legal Last N	lame*		
Enter text here		Middle Name	Enter text	here		
Date of Birth*		Other Names Used			Suffix	
# mm/dd/yyyy		Other Names Used			Select	\checkmark
Birth Country*		Birth City*		Birth State*		
Select		Enter text here		Enter text r	ere	
company/Organization	Position/Title	e				
Enter text here	Enter text	here				
	Enter text here tate of Birth* ff mm/dd/yyyy iSN (xxx-xx-xxxx)* contirm (xxx-xx-xxxx)* iSN country (xxx-xx-xxxx)* Select Company/Organization Enter text here	Enter text here inter of Birth* ff mm/dd/yyyy iSN (xxx-xx-xxxx)* contirm (xxx-xx-xxxx)* xxx-xx-xxxxx strint Country* Select Company/Organization Position/Title Enter text here Enter text here Enter text here	Enter text here Middle Name Middle Name Used Other Names Used Other Names Used Other Names Used Strike Names Used Other Names Used Other Names Used Strike Names Used Names Name	Enter text here Middle Name Enter text ate of Birth* Other Names Used ff mmiddiyyyy Other Names Used other Names Used other Names Used tisN (box-xx-xoox)* sisN (box-xx-xoox)* sisN cox-xx-xoox Birth City* Select Select Filter text here Enter text here	Enter text here Middle Name Enter text here En	Enter text here Middle Name Enter text here ate of Birth ff middlyyyy Other Names Used Select Select Sonfirm (xxx-xxxxx)* Select Select Enter text here Enter text her

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

User Details				
Personal Details				
Contact Details				
Personal Phone #"	Work Phone #*			
()000;)0000-20000	(000()000-30000			
Work Address Line 1 (Where you p	erform work from each day)*			
Enter text here				
Work Address Line 2				
Work City*	Work State*		Work Zip code*	
Enter text here	Select	~	Enter numbers here	
Is this your home address? *				
O Yes () No				
Home Address Line 1*				
Enter text here				
Home Address Line 2				
Home City*	Home State*		Home Zip code*	
Enter text here	Select		Enter numbers here	
Additional Details				

Figure 94: Contact Details section

Create/Modify Access Request	
* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of th screen. After minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page	ie ge.
OUser Details	
O Personal Details	
O Contact Details	
Additional Details	
Applicant can access the required documentation and training by clicking on this link	
Uplosd PIV Training Certificate* Current Document Browse (File types: pdf, docx, jpg, jpeg, tiff, tif, png)	
Upload Other Document Current Document (File types: pdf, docx, jpg, jpeg, tiff, tif, png)	
Admin Code* Are you a Manager?*	
Admin Code O Yes O No	
CMS Region/Facility*	
Select	
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application. Save Request Submit Request	

Figure 95: Additional Details section – CMS Employee

Create/Modify Access Request
* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.
OUser Details
O Personal Details
O Contact Details
Additional Details
Applicant can access the required documentation and training by clicking on this link.
Upload PIV Training Certificate* Current Document Browse (File types: pdf, docx, jpg, jpeg, tiff, tif, png)
Upload Other Document Current Document (File types: pdf, docx, jpg, jpeg, tiff, tif, png)
Admin Code
Admin Code
CMS Region/Facility*
Select
Inter-Agency Agreement Number
Inter-Agency Number
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application.
Save Request Submit Request

Figure 96: Additional Details section – Federal Agency Employees

Create/Modify Access Request
* Please fill out each of the sections below to complete your Access Request. You may save your work at any time using the 'Save Request' button at the bottom of the screen. After minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page.
OUser Details
O Personal Details
Contact Details
Additional Details
Upload Other Document Current Document (File types: pdf, docx, jpg, jpeg, tiff, tif, png) CMS Region/Facility
lama*
General Consultant
Company Name* Plan Number(s) (e.g., h0001, 10000)* GENERAL PLAN CONSULTING Plan Number(s)
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application. Save Request Submit Request

Figure 97: Additional Details section – HPMS Business Partner

Please fill out each of the sections below to complete your Access Request. You may save your work and any time using the "Save Request button at the bottom of the screen. After 15 minutes of inactivity, you will lose any unsaved work and you will be logged out of the application. If you have any questions, please refer to the FAQ page. Ouser Details O Contact Details Additional Details
OUser Details Personal Details Contact Details Additional Details
Personal Details O Contact Details Additional Details
Contact Details Additional Details
Additional Details
Applicant can access the required documentation and training by clicking on this <u>link</u> Reminder: The OF-306 must have a wet signature. Digital signatures are not allowed.
Upload PIV Training Certificate* Current Document Browse (File types: pdf, docx, jpg, jpg, tiff, tif, png)
Upload Resume* Current Document Browse (File types: pdf, docx, jpg, jpeg, tiff, tif, png)
Upload Signed Declaration for Current Document Federal Employment Form - 0F-306* Browse (File types: pdf, docx, jpg, jpg, tiff, tif, png)
Upload Other Document Current Document Browse (File types: pdf, docx, jpg, jpeg, tiff, tif, png)
Desired EUA Username Username (4-7 alphanumeric)
CMS Region/Facility*
Select
Start typing your contract number below.
Contract Number* Contract Mod
Contract Number and Order Mod
Please make sure to verify your information before you submit. Incorrect information may result in the rejection or delay of your application. Save Request Submit Request

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

EFI EUA Front-End Interface Home	FAQ Guide	s Sign In 🖉	CMS
PIV CREDENTIALING and EUA FROM FREQUENTLY ASKED QUESTIONS (INTRODUCTION: It is the policy of the United States to enhance see Government-wide standard for secure and reliable employees). Therefore, in accordance with HSPD access to a CMS federally controlled information a regarding common questions associated with for accomplication this	T-END INTER FAQs) urity, increase Goo forms of identifica 12 and NIST stan ystem or sensitive the Contractor Ar	FACE (EFI) remment efficiency, reduce identity fraud, and protect personal privacy by establishing a mandator tion issued by the Federal Government to its employees and contractors (including individual cont dards, CMS Contractor employees that require routine physical access to a CMS facility and/or rou information, are required to obtain a CMS issued PIV card. This document seeks to provide gui ccount (Badging) Provisioning/Credentialing process and the use of the EFI system as the r	ry, tractor utine idance means
General Questions	the best for using led? ause of a Compation contractor computing round Investigatii EFI request for a nother contractors	the EFI application? bility View issue with IE 11. How can I change the settings in my browser? Iss? ns (BI) and credentialing process? PIV card when they do not have physical access to CMS facilities nor logical access to CMS syste who have been properly vetted?	ems, but
 EFI User Registration Questions 1.What is EFI Registration and how or 2. What should I do if I did not get the 	oes it differ from n activation link afte	iy Access Request? ar I registered in EF1?	
Federal Approver/COR Questions 1.How can I find out more information 2.How can I change the EFI Contract 3.The COR is wrong in EUA/EFI how 4.My contractor is off contract or no I 5.How can I add a contract number t 6.How can 2 Odd obtain the status c 7.Please explain the PDT and what it	on the COR's res POC? do I get this fixed' onger needs acces o an existing EUA f EFI requests for required of CORs	ponsibilities and process associated with contractor account (badging) provisioning? , s to the job codes they have assigned, what do I do? user account? contractors on a particular contract? regarding it?	
EFI Access Request Submission Questions 1.How do I check or know the status 2. Where can I go to complete my Pi 	of my Access Req / Applicant Trainin	uest in EFI? g Certificate?	

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 <u>https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html</u>. 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.

Sign In Methods to EFI				
E	xisting User ar	POC and New User Guides here. nd Federal Approver Guides (Internal) here (External) here.		
Are you a New User? If so Click the "Register" button below to create an account and begin an automated request for access to CMS assets.				
CMS Employee PI	V Card	EFI Credentials		
(Privileged Users Only) Username Username Username Username Password Password Login Register Forgot Username? Forgot Username? Forgot Password?				

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 <u>EUA Documentation Repository</u>

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.