

Federal IDR Portal Access Job Aid

Introduction

This job aid provides step-by-step instructions to request CMS IDM System access, Salesforce access, and access to the Federal IDR Portal application.

Users only need to request access to Salesforce and the Federal IDR Portal application one time.

This document addresses the following steps:

- Requesting CMS IDM System Access
- Requesting Salesforce Access
- Requesting the Federal IDR Portal Application

Requesting CMS IDM System Access

This section provides instructions to register for a CMS Identity Management account. You will register for an account and complete identity verification.

You must complete this process prior to requesting access to Salesforce.

1. Go to CMS Identity Management at CMS IDM System.



Figure 1: CMS Identity Management Sign In



Select the *New User Registration* button to begin the registration process. 2.



Figure 2: New User Registration

3. Then, you will proceed to the *Personal Information Page*. You must *input* data into all required fields. Once you read the Terms & Conditions, you must select I agree to the Terms and Conditions in the required field, then select the *Next* button to continue. Optional fields contain the label optional.

	0	0	3	
	Personal	Contact	Credentials	
	* Optional fields are lab	eled as (Optional).		
	First Name FirstName			
	Middle Name (Optional)			
	Last Name LastName			
	Suffix (Optional)		*	
	Date Of Birth 01/01/1990			
	E-mail Address FirstName.LastName@	∂domain.gov		
	Confirm E-mail Address FirstName.LastName@	∋domain.gov		
	View Terms & Condit	ions		
	I agree to the terms	and conditions		
	Cancel		Next	
erms & Conditions	A federal government website ma	anaged and paid for by the U.S. Cente L Medicaid Services.	rs for Medicare 🈏	• • (

Figure 3: Personal Information

The Terms & Conditions information will display once you select the View Terms & Conditions button.



You will then proceed to the *Contact Information Page*. You will *enter* your address and phone number in the required fields, then select the *Next* button to continue with the registration process. Optional fields contain the label optional.

0	2	3	
Personal	Contact	Credentials	
* Optional fields are la	abeled as (Optional).		
Is your Address a US	or Foreign Address? Foreign Address		
Home Address Line 1 1234 Any Street			
Home Address Line 2 (Opt	tional)		
City Any City			
 Texas		× •	
Zip Code 76522			
Zip Code Extension (Optio	onal)		
Phone Number			
Cancel Back		Next	

Figure 4: Contact Information



4. On the next page, you will create a *user ID*, *password*, and *security question*. After entering the information in the required fields, select the *Submit* button to continue. Optional fields contain the label optional.

CMS.gov IDM Self Servi	ce		
	Personal	Contact	Credentials
	* Optional fields are lab	peled as (Optional).	
	User ID UserId1234		
	New Password The_pswd1		Ø
	Confirm Password — The_pswd1		Ø
	Security Questions What was the first col	mputer game you played?	× •
	Answer AnswerGameName		
	Cancel Back		Submit

Figure 5: Credentials Information

5. You will proceed to the Registration Summary Page where you will see a message that your registration request is completed. Select the Return button to go back to the CMS IDM login page.



Figure 6: Registration Summary



6. After submitting your registration request, you will receive email confirmation that you've successfully registered for your CMS Identity Management account. You may select the *link* provided in the email to login to your CMS Identity Management account.

*Registration is now complete.

Requesting Salesforce Access

1. Go to the CMS Identity Management System at CMS IDM System.

CMS.gov IDM	
Sign In	
Username	
Password	
Agree to our <u>Terms & Conditions</u>	
Sign In	
OR	
New User Registration	
Forgot your <u>Password, User ID</u> or <u>Unlock</u> your account?	

Figure 7: CMS Identity Management System – Sign In



 Sign In to the CMS IDM System by entering your User ID and Password and attesting to the terms & conditions by selecting the checkbox in front of the statement: Agree to our Terms & Conditions. Then select the Sign In button.

CMS.gov IDM
Sign In
Username
UserID
Password
•••••
Agree to our <u>Terms & Conditions</u>
Sign In
OR
CMS PIV Card Only
Attention CMS PIV card users: The CMS PIV Card button will be active after initial login using your 4 character CMS EUA ID.
New User Registration
Forgot your <u>Password, User ID</u> or <u>Unlock</u> your account?

Figure 8: CMS Identity Management System – Sign In

3. An email authentication message appears. Select the *Send me the code* button to receive a six-digit code to login.



Figure 9: Verify with Email Authentication – Send me the Code



4. This generates a one-time six-digit code to the email address associated with your account. Enter the code in the *Verification Code* field and select the checkbox in front of the statement: *Do not challenge me on this device for the next 30 minutes*.



Figure 10: Verify with Email Authentication Screen – Verification Code

5. Select the *Verify* button.



Figure 11: Email Authentication – Verify



6. After signing in, the *IDM Self Service* page opens. Select *the Role Request* tile to *navigate* to the *Select Application* page.



Figure 12: IDM Self Service Page – Role Request

7. Use the *Select an Application* drop-down menu to locate the *Salesforce* application or enter the first few letters of the application in the drop-down menu to narrow the selection criteria. The system will automatically advance to the *Select a Role* page.

Noie Request		
	* Opt	tional fields are labeled as (Optional).
0	2	3
Application	Role	Review
Select an Application		•
Medicare Exclusion Database (MED)		•
MLMS		-
Novitasphere		
Open Payments		
PS&R/STAR		
Salesforce		
Sample Application		

The system displays the Access Catalog list in alphabetical order.

Figure 13: Role Request Drop-down Menu



8. Select the *Salesforce User* option from the *Select a Role* drop-down menu. After selection of the role, the system automatically advances to the *Remote Identity Proofing* page.

ole Request			0
		* Optional fields ar	e labeled as (Optional).
0	0	3	4
Application	Role	Attributes	Review
Selected Application Sample Application			
This is a Sample Test Appli needed basis if any issues	cation that is utilized arise	to test in the production env	rironment on an as
This is a Sample Test Appli needed basis if any issues View Helpdesk Det:	cation that is utilized arise ails	to test in the production env	rironment on an as
This is a Sample Test Appli needed basis if any issues View Helpdesk Deta	cation that is utilized arise ails	to test in the production env	rironment on an as
This is a Sample Test Appli needed basis if any issues View Helpdesk Det: Celect a Role	cation that is utilized arise	to test in the production en	ironment on an as
This is a Sample Test Appli needed basis if any issues : View Helpdesk Det: Select a Role	cation that is utilized ' arise	to test in the production env	ironment on an as
This is a Sample Test Appli needed basis if any issues : View Helpdesk Det: Select a Role End User	cation that is utilized ' arise	to test in the production env	ironment on an as
This is a Sample Test Application of the sample rest Application of the sample of the	cation that is utilized arrise	to test in the production env	ironment on an as
This is a Sample Test Applies meeded basis if yn issues View Helpdesk Detr Select a Role End User Salesforce User Help Desk	cation that is utilized i arise	to test in the production env	ironment on an as
This is a Sample Test Appli event of the sample Test Appli View Helpdesk Detr - Select a Role End User Salesforce User Help Desk Salesforce Help Desk J	cation that is utilized i arise	to test in the production env	ironment on an as
This is a Sample Test Appl This is a Sample Test Appl View Helpdesk Det: -Select a Role End User Salesforce User Help Desk Salesforce Help Desk A Salesforce Help Desk H	cation that is utilized i ails Admin Jser	to test in the production en	X A

Figure 14: Salesforce User Option

9. On the *Remote Identity Proofing* page, attest that you agree with the terms and conditions by selecting the checkbox in front of the statement: *I agree to the terms and conditions*. Select the *Next* button to complete the remote identity verification.

The other user roles are Help Desk specific roles, and you will not request these if you are outside the component organization help desk.

	* Optional fields are labeled as (Optional
0 0	0 0 0
Remote Identity Proofing	
Identity Verification	
To protect your privacy, you will need to com requesting access to the selected role. Below	plete Identity Verification successfully, before w are a few items to keep in mind.
Ensure that you have entered your legal nam	e, current home address, primary phone numbe
date of birth and E-mail address correctly. W your identity with Experian, an external Ident	e will only collect personal information to verify ity Verification provider.
Identity Verification involves Experian using	information from your credit report to help
confirm your identity. As a result, you may se	se an entry called a "soft inquiry" on your
charges related to them.	
You may need to have access to your person	hal and credit report information, as the Experia
application will pose questions to you, based	d on data in their files. For additional
information, please see the Experian Consum	ner Assistance website.
111422-00000-02400-00012-00012-0002	
View Terms & Conditions	
I agree to the terms and conditions	

Figure 15: Remote Identity Proofing Page – Identity Verification



10. Enter your information in the required fields as indicated, then select the **Next** button. Fields can auto-populate with the information you provided at the time of registration.

		* Opti	onal fields are l	abeled as (Opt
0	0	0	4	5
Application	Role	RIDP	BCI	Review
emote Identi	ity Proofin rm below and c ted you will hav	ng click the Next But ve 10 minutes and	ton to initiate th d 1 attempt to c	ne verification omplete the RI
First Name		l ant N		
FirstName		Last	lame	
– Middle Name (Opti	onal)	Suffix	(Optional)	
				*
			2.12.12	
- Date Of Birth		Social	Security Number -	0
- E-mail Address	tName@dom	nain.g	n E-mail Address Name.LastNar	ne@domain.g
E-mail Address FirstName.Las	a US or Forei	ign Address?	n E-mail Address Name.LastNar	ne@domain.g
E-mail Address FirstName.Las	a US or Forei Grant Content of C	ign Address?	n E-mail Address - Name.LastNar	ne@domain.g
FirstName.Las Syour Address US Address US Address Is your Address Line 1234 Any Stree	a US or Forei US or Foreig Foreig Addre	ign Address?	n E-mail Address Name.LastNar	ne@domain.g
Final Address FirstName.Las Sour Address US Address US Address Los Address Line 1234 Any Stree Home Address Line	a US or Foreig Foreig Addre	aain.g Confir First? ign Address? in ss	n E-mail Address	ne@domain.g
Final Address FirstName.Las Sour Address US Address US Address Line Address Line 1234 Any Stree Home Address Line City	a US or Foreig Foreig Addre e 1 e 2 (Optional)	aain.g Confir First? ign Address? in ss	n E-mail Address	ne@domain.ç
E-mail Address FirstName.Las Is your Address US Address US Address Las Home Address Line Home Address Line City Any City	a US or Foreig Groeig Addre	ign Address?	n E-mail Address Name.LastNar	ne@domain.ç
E-mail Address FirstName.Las Is your Address US Address US Address Home Address Line 1234 Any Stree Kome Address Line City Any City Zip Code 76522	a US or Foreig Group Addre	aain.g Confir First? ign Address? in ss	State Texas	ne@domain.ç
E-mail Address FirstName.Las Is your Address US Address Line Home Address Line Home Address Line City Any City Zip Code 76522 Chans Number	a US or Foreig a US or Foreig Foreig Addre e 1 e 2 (Optional)	aain.g Confir First?	State State Zip Code	ne@domain.c
Final Address FirstName.Las Source Address US Address US Address US Address US Address US Address Interference Address Line City City Zip Code 76522 Phone Number S55-555-5555	a US or Foreig Addre	ign Address?	State Texas	ne@domain.ç
E-mail Address FirstName.Las Is your Address US Address US Address Home Address Lind 1234 Any Stree Home Address Lind 1234 Any City City Any City Zip Code 76522 Phone Number 555-5555	a US or Foreig Group Addre	aain.g Confir First?	State Zip Code 2000	ne@domain.ç
E-mail Address FirstName.Las Sour Address US Addres US Address US Addre	a US or Foreig Addre	ign Address?	State State Texas	ne@domain.c

Figure 16: Remote Identity Proofing Page – Personal Information

This screen may not display depending on existing user role.



11. On the *Update Business Contact Information* page, enter information about the company that you represent. Select the *Update Business Contact Information* button to continue.

ole Request			5
		* Optional fields a	re labeled as (Optiona
			0
Application	Role	BCI	Review
Update Business	Contact Info	ormation	
* Optional fields are labe	eled as (Optional).		
Last 4 of SSN			
1234			
Professional Credentials (Optional)		
Company Name			
Any Company			
Address Line 1			
123 Any Street			
Address Line 2 (Optional)			
Any City			
C State			
Texas			× •
Zip Code 76522			
← Zip Code Extension (Optio	nal) —		
1234	-		
Company Phone Number -			
555-555-5555			
Company Phone Extensior	(Optional)		
L			
Office Phone Number 666-666-6666			
	-1 - 1		
Office Phone Extension (O	ptional)		
Cancel Back	Up	date Business Co	ntact Information

Figure 17: Update Business Contact Information



12. Review the information previously entered and enter your reason for requesting the Salesforce application in the *Reason for Request* field. Then select the *Submit Role Request* button to submit the Salesforce application access request.

Role Request			8
Application	Role	BCI	Review
Review			
Application:	Salesfo	rce	
Application Description:	CMS bu CMS En State O	siness applications on Salesfo pployees/Contractors,Applicar ganizations, and General Publ	orce Platform. Users include nts, Providers, Participants, lic etc.
Role:	Salesfo	rce User	
Role Description:	CMS En State O	nployee/Contractor, Applicants ganizations, and General Publ	s, Providers, Participants, lic etc.
Reason for Request I need access to Salesforce ap Cancel Back	oplication.		Submit Role Request

Figure 18: Review Request

13. The portal displays a message acknowledging successful submission of your request. Record the *Request ID* number in the event that any additional communications is necessary for this request.

Role Requ	est	::
Your request for submitted. The	or the Salesforce User role in the Salesfor e following Request ID has been generated	ce application was successfully I.
Request ID	Attribute	Value
1108923	N/A	N/A
		Back to Home

Figure 19: Role Request Confirmation Message – Request ID



14. Select the *Back to Home* button and close the browser window to logout.

Role Request		::		
Your request for the Salesforce User role in the Salesforce application was successfully submitted. The following Request ID has been generated.				
Request ID	Attribute	Value		
1108923	N/A	N/A		
		Back to Home		

Figure 20: Role Request Confirmation – Back to Home Button

- 15. The system generates the following email notifications after submission of the request to access Salesforce:
 - Submission of Request
 - Approval of Request

It may take several minutes for the Salesforce tile to appear. Logout and wait approximately 10 minutes to receive the Approval of Request email notification before beginning the next steps.



Requesting the MATS Application

After receiving access to Salesforce, users must *request* access to the Federal IDR Portal application.

1. Go to the *CMS Identity Management System* at <u>CMS IDM System</u>.



Figure 21: CMS IDM System – Sign In

2. Sign In to the *CMS IDM System* by entering your *User ID* and *Password*, and attesting to the terms & conditions by selecting the checkbox in front of the statement: *Agree to our Terms & Conditions*. Then select the *Sign In* button.



Figure 22: CMS IDM System – Sign In



3. An email authentication message appears. Select the *Send me the code* button to receive a six-digit code to login.



Figure 23: Verify with Email Authentication – Send me the Code

4. This generates a one-time six-digit code to the email address associated with your account. Enter the code in the *Verification code* field and select the checkbox in front of the statement: *Do not challenge me on this device for the next 30 minutes*.



Figure 24: Verify with Email Authentication Screen – Verification Code



5. Select the *Verify* button.



Figure 25: Email Authentication – Verify

6. After selecting the *Verify* button, the *App Launcher* page opens. Select the *App Store* button in the top righthand corner of the screen.

СМ	S.gov Saleforce Enterprise Integration		? ()
	App Launcher	Q. Find an app	App Store
	All Apps		
		To request access to an application, click the "App Store" button.	

Figure 26: App Launcher Page – App Store



- 7. Scroll through the available apps to find the *Federal IDR Portal* tile. You can also enter *IDR* in the *Find an app* field at the top of the page. Select the *Federal IDR Portal* tile to continue.
- 8. The *CMS App Listing* pop-up window for the Federal IDR Portal tile appears. Under the *Request Access* section in the Request Access text box, enter the following statement: *Access Required to support the IDR program.*
- 9. Select the *Send Request* button.
- 10. After selection of the *Send Request* button, a confirmation banner message displays confirming the access request submission. The generation of a confirmation number happens at this time.
- 11. When access to the Federal IDR Portal tile has cleared, log in to the portal and the *Federal IDR Portal* tile is now in the app launcher. Select the tile and the Community will open.