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.

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

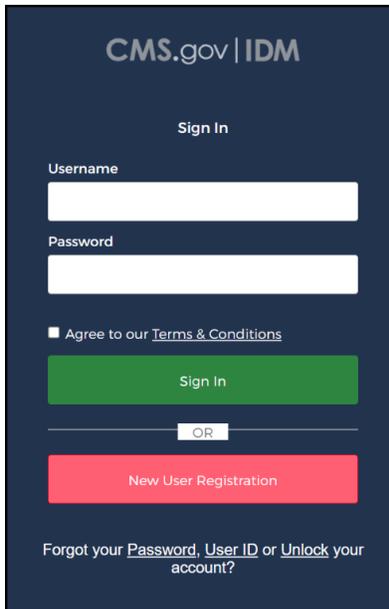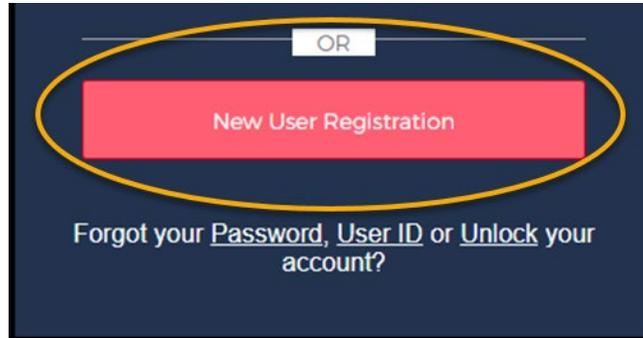2. Select the **New User Registration** button to begin the registration process.

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.

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.

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.

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.

Figure 7: CMS Identity Management 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 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***.
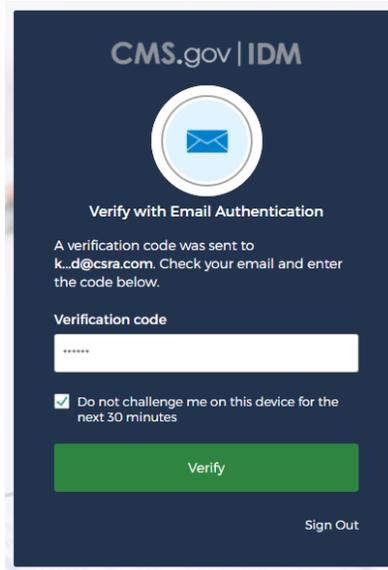

Figure 10: Verify with Email Authentication Screen – Verification Code
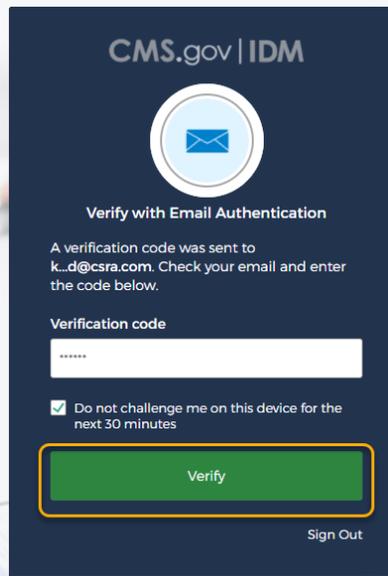
5. Select the *Verify* button.

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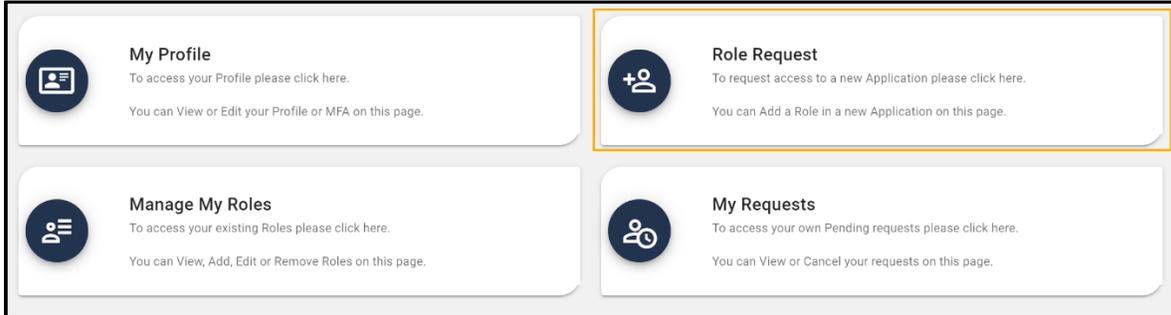
7. Use the **Select an Application** drop-down menu to locate the **Salesforce** application or enter the first few letters of the application in the drop-down menu to narrow the selection criteria. The system will automatically advance to the **Select a Role** page.

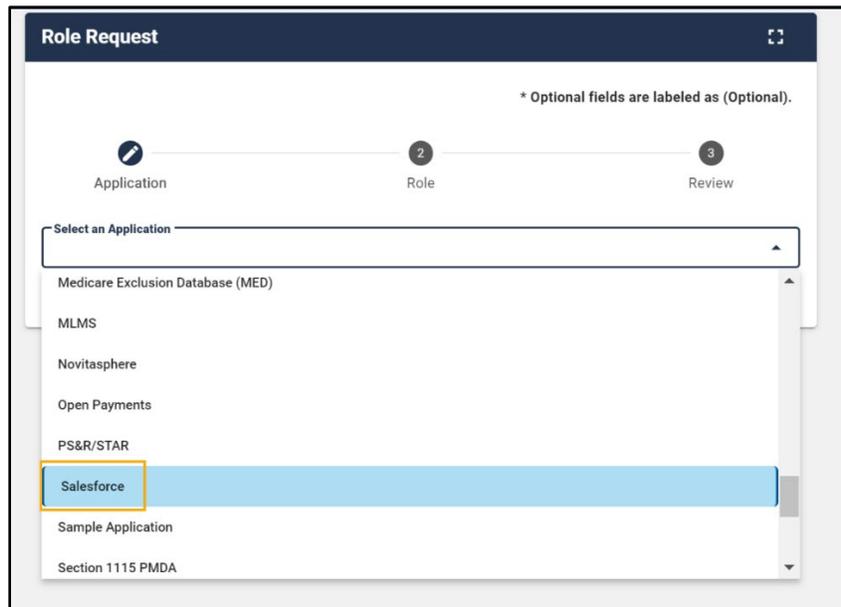*The system displays the Access Catalog list in alphabetical order.*

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.
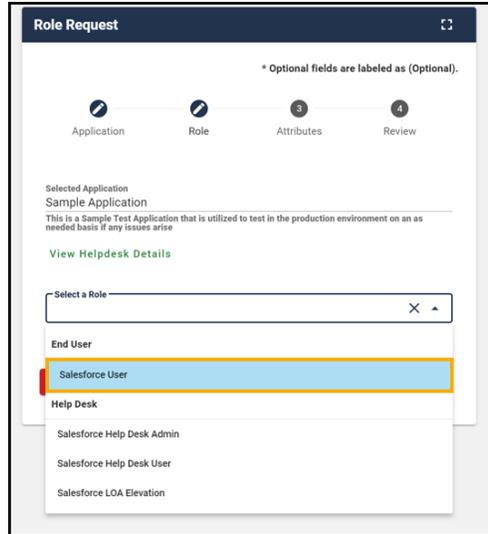

Figure 14: Salesforce User Option

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.
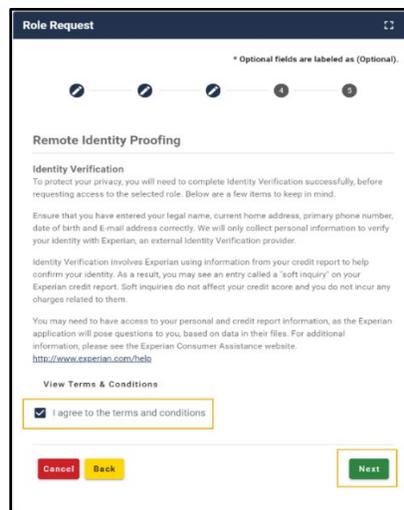

Figure 15: Remote Identity Proofing Page – Identity Verification

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.

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.

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.

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.

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 CMS IDM System.

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.
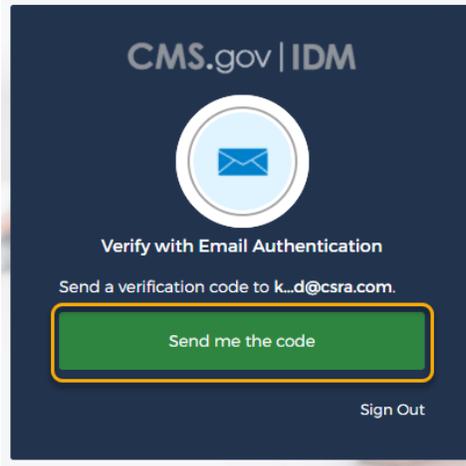

Figure 23: Verify with Email Authentication – Send me the Code

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***.
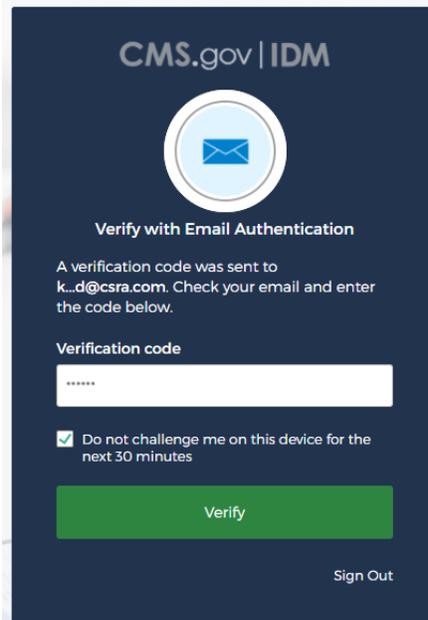

Figure 24: Verify with Email Authentication Screen – Verification Code
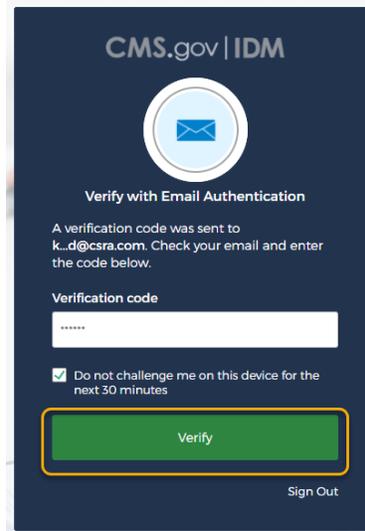
5. Select the *Verify* button.

Figure 25: Email Authentication – Verify

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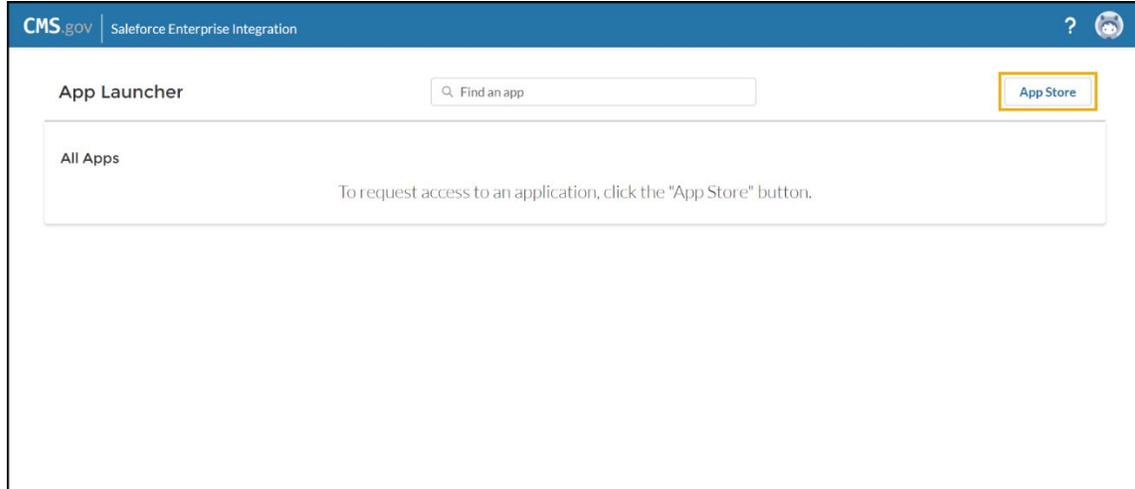

Figure 26: App Launcher Page – App Store

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.