Multi-Factor Authentication (MFA) Training for HIOS Users

JUNE 2016

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

Agenda

Beginning on 6/19/2016, all Health Insurance Oversight System (HIOS) users will be required to complete Multi-Factor Authentication (MFA) through the CMS Enterprise Portal.

This training session will cover the following topics:

- Upcoming Enterprise Portal Changes
- What is MFA?
- MFA Device Registration
- Logging into the CMS Enterprise Portal using MFA
- MFA Device Removal

Upcoming CMS Enterprise Portal Changes

Users will see the following changes when accessing the CMS Enterprise Portal:

- **5/8/2016:** All existing HIOS users have the option to register an MFA device in the CMS Enterprise Portal. Please note, users who choose to register an MFA device prior to 6/19 will be required to log in using an MFA device from that point forward.

- **6/19/2016:** All existing HIOS users will be required to register an MFA device in the CMS Enterprise Portal and will be required to use the registered MFA device to access the CMS Enterprise Portal.

- **6/19/2016:** All new HIOS users will be required to complete Remote Identity Proofing (RIDP) as well as register an MFA device.

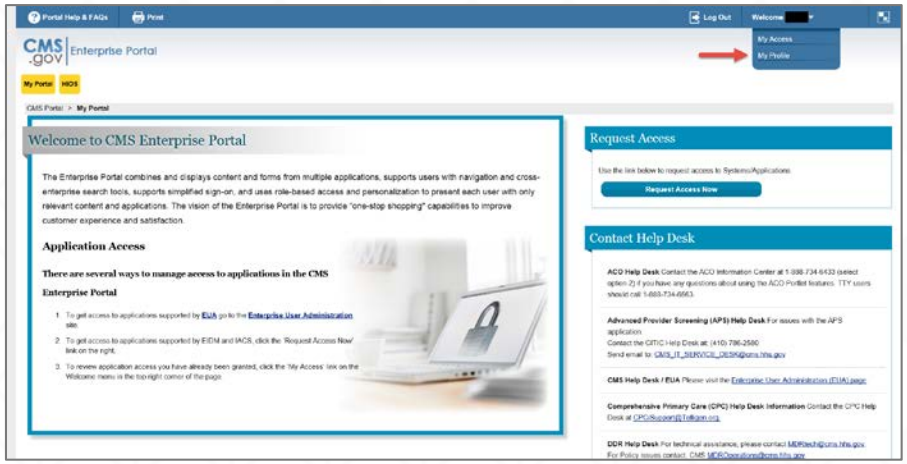
What is MFA?

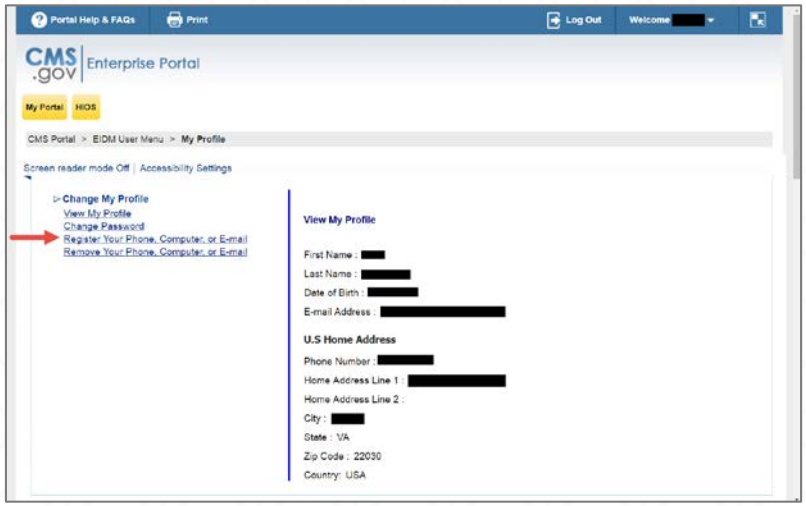
- Multi-Factor Authentication (MFA) is a security mechanism that is implemented to verify the legitimacy of a person or transaction.
- MFA requires you to provide more than one form of verification in order to prove your identity.
- MFA registration is required only once but an MFA device will be verified every time you log into the system.
- Users can register multiple MFA device types to obtain a security code.

MFA Device Registration

MFA Device Registration – Prior to June 19th

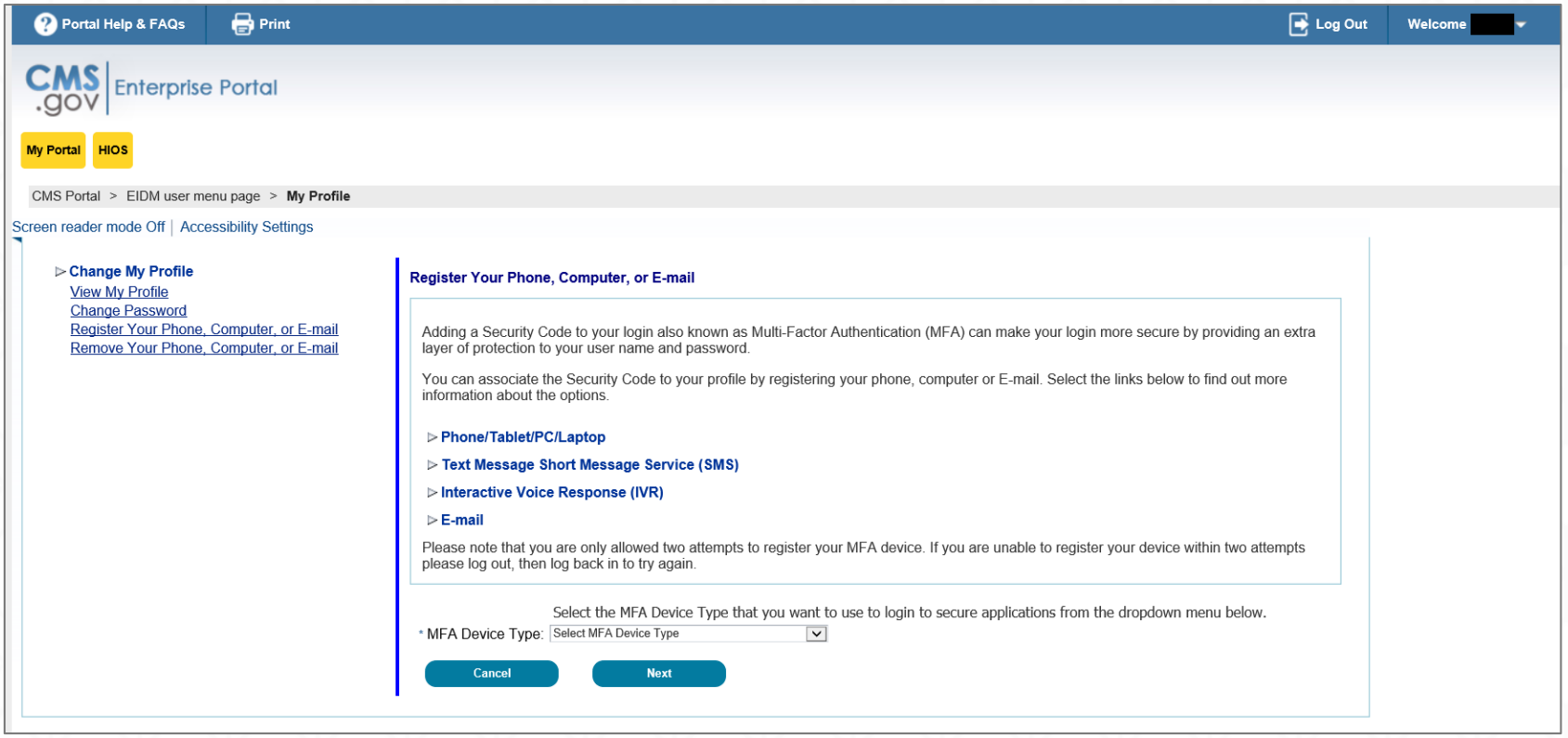
- Prior to 6/19/2016, HIOS users have the option to register an MFA device.
- To "preregister", go to the CMS Portal > My Portal page and select ***My Profile*** from the username dropdown menu.
- From the CMS Portal > My Profile page, click the ***Register Your Phone, Computer, or E-mail*** link.





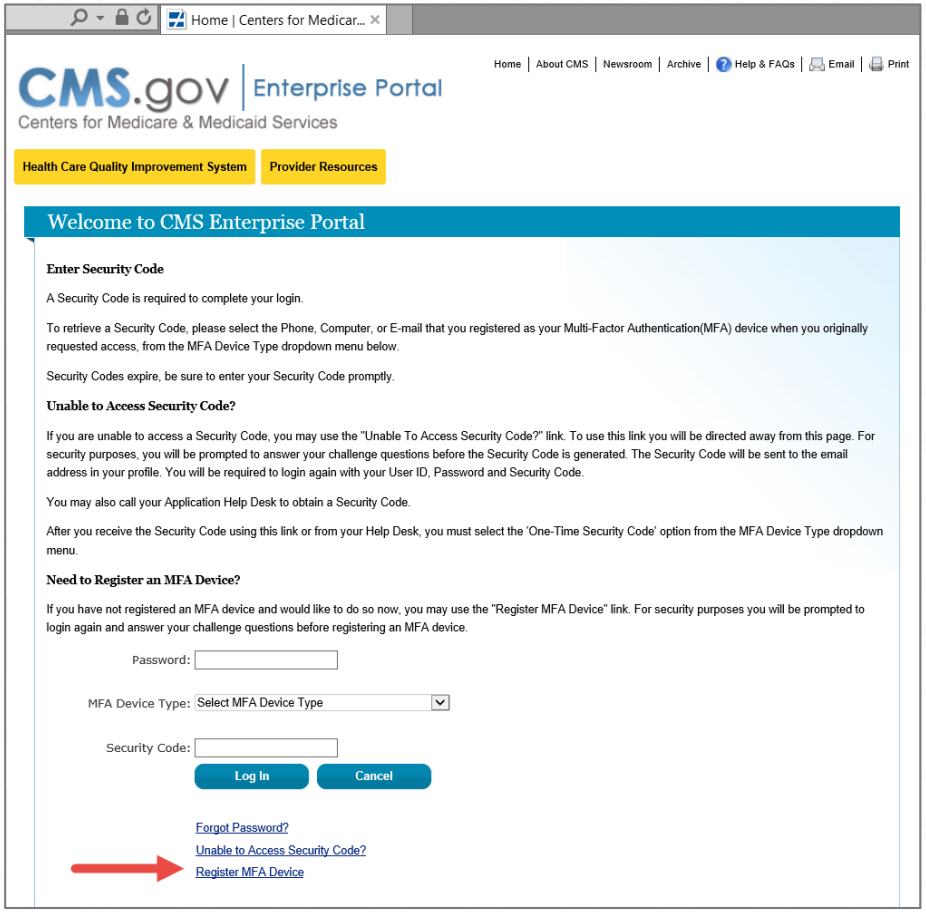
MFA Device Registration – Prior to June 19th

- Select the ***MFA Device Type*** and click the ***Next*** button to proceed with the device registration.



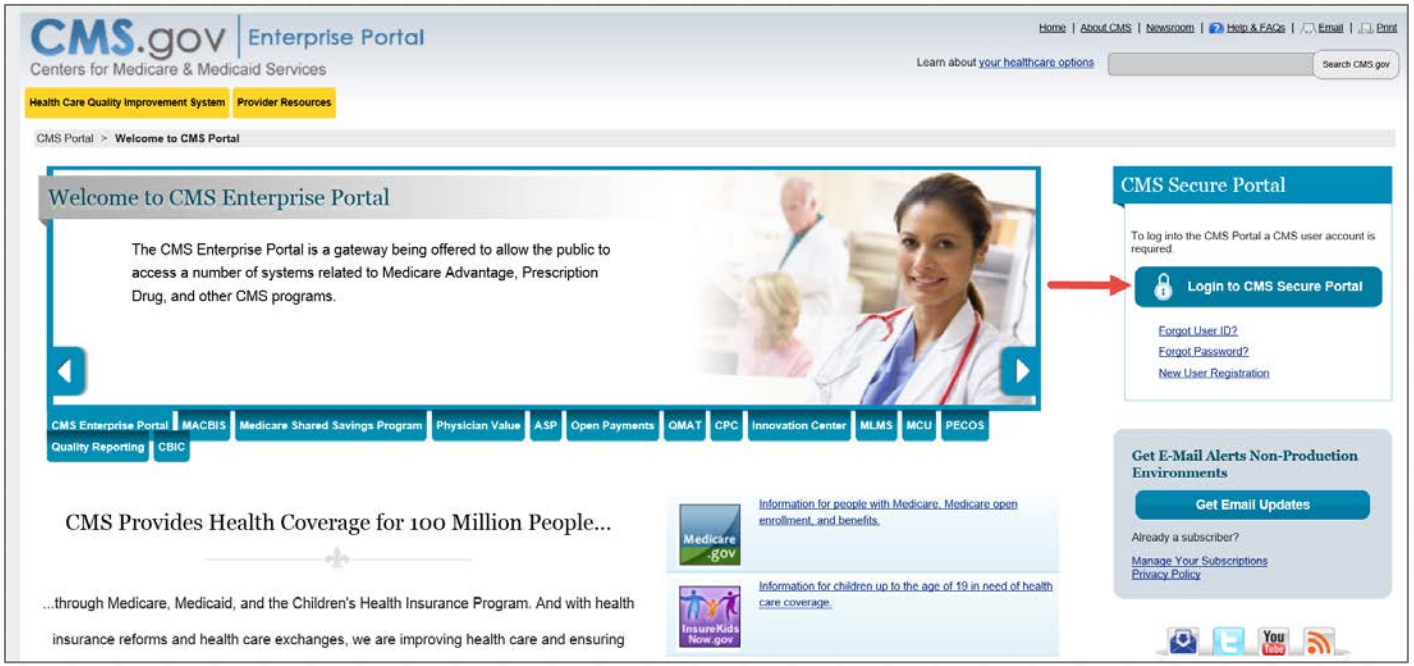
Beginning June 19th – MFA Device Required

- Beginning on 6/19/2016, users will be required to use an MFA device when accessing the system. This page will display after users enter their username when trying to access the system.
- If users have not "pre-registered" a device via the My Profile page, users will need to click the 'Register MFA Device' link to complete the registration process.
- If users have already registered an MFA device, users will need to select the appropriate device and input the security code to login.
- Please note, until users complete the MFA device registration, users will not be able proceed with logging into the CMS Enterprise Portal.



Beginning June 19th – Steps for MFA Device Registration

1. Go to https://portal.cms.gov and select ***Login to CMS Secure Portal***.
2. Read the Terms and Conditions and select ***I Accept*** to continue.
3. Enter your ***User ID*** and select ***Next.***

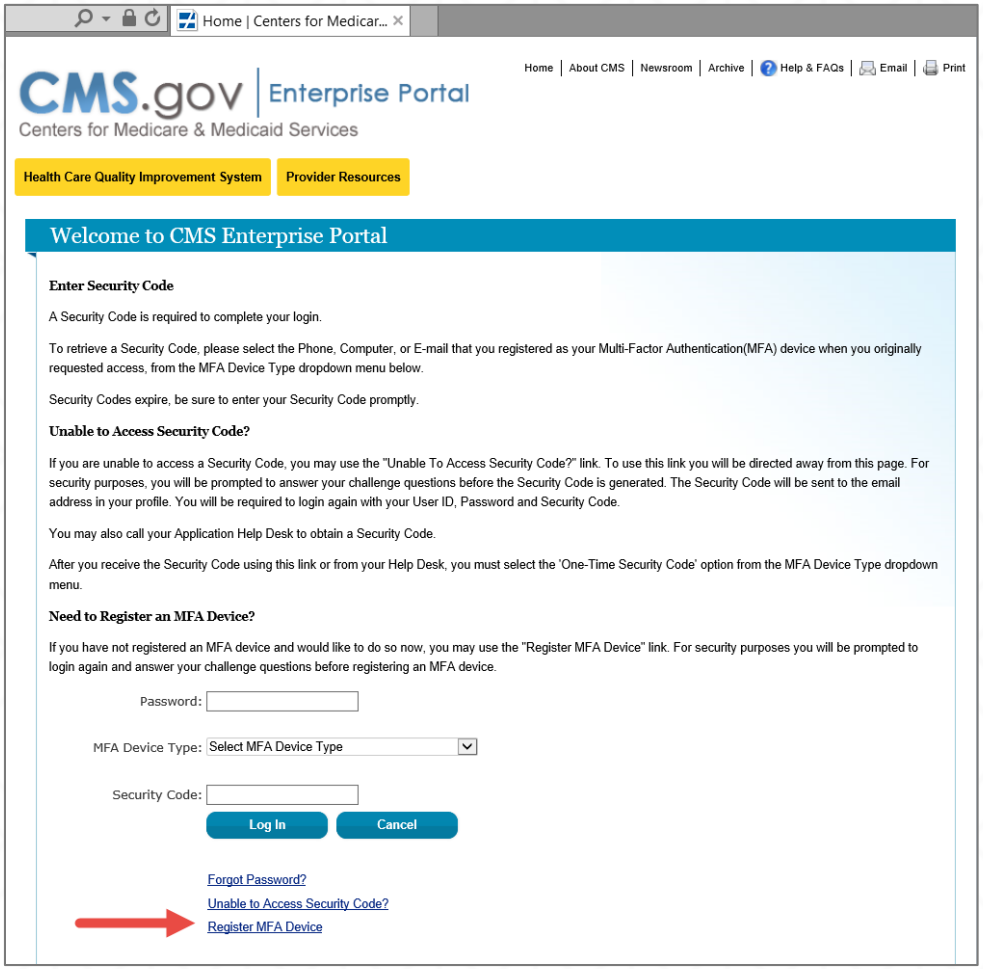


Beginning June 19th – Steps for MFA Device Registration

4. Select the ***Register MFA Device*** link.

5. Select ***OK*** to navigate away from the login page.

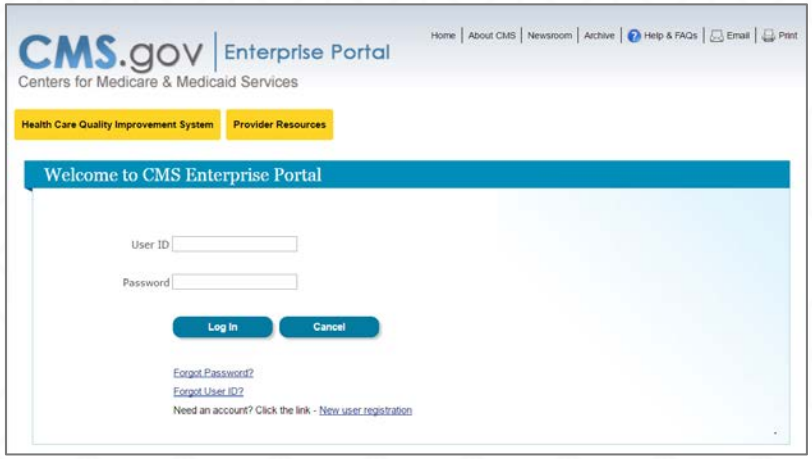
6. Read the Terms and Conditions and select ***I Accept***.

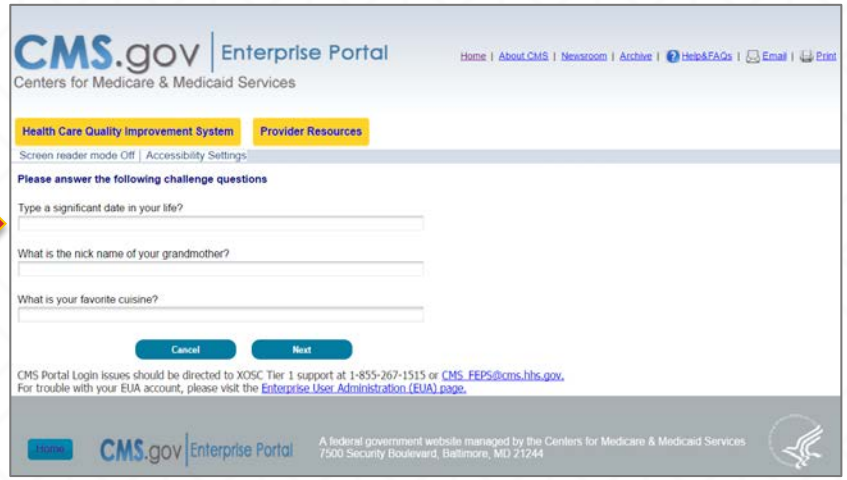


Beginning June 19th – Steps for MFA Device Registration

7. Enter your ***User ID*** and ***Password***, and select ***Log In.***

8. Answer the challenge questions and select ***Next***.





Beginning June 19th – Steps for MFA Device Registration

9. Select an MFA device from the ***MFA Device Type*** dropdown. Follow the on-screen instructions for your selected device type to complete the registration.

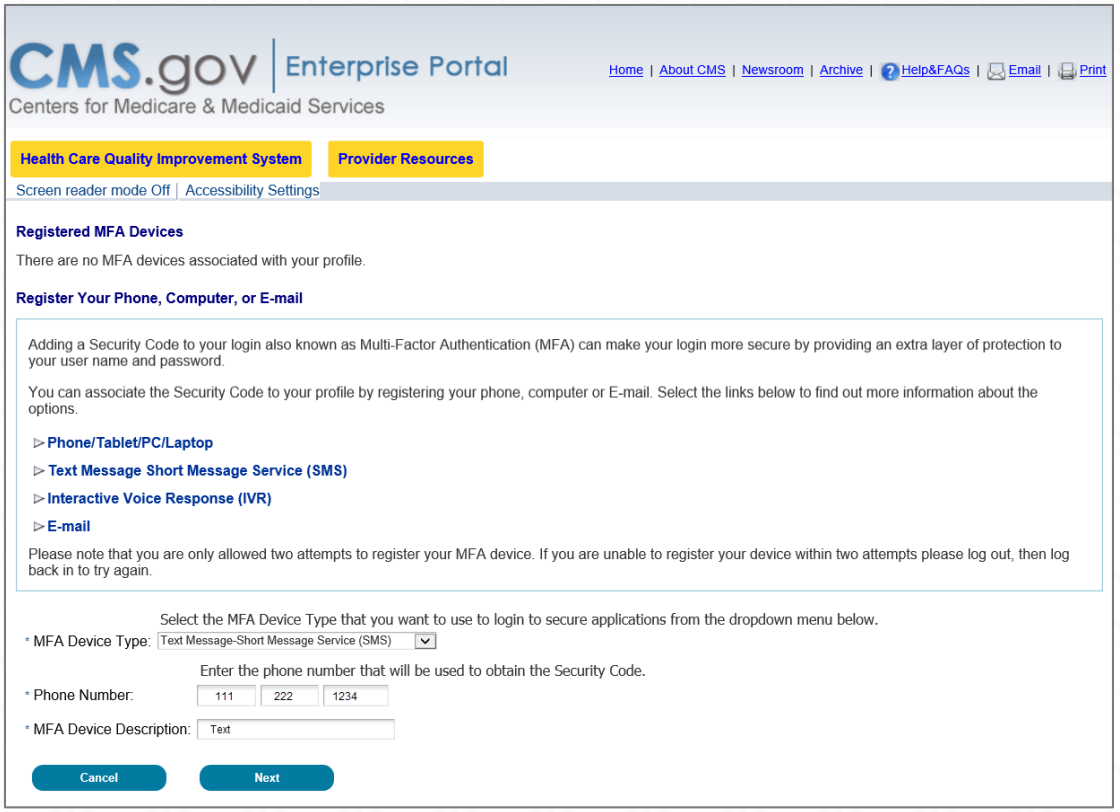
MFA Device Options

- Text Message – Short Message Service (SMS)
  - User provides a phone number to obtain a security code.
- E-mail
  - User provides a valid, accessible e-mail address to receive a security code.
- Phone/Tablet/PC/Laptop
  - User downloads the Symantec Verification and Identity Protection (VIP) Access software on their device to generate a security code.
- Voice Message – Interactive Voice Response (IVR)
  - User provides a phone number to receive a voice message containing the security code.

Note: Users may register up to four (4) MFA devices for their account.

MFA Device Type: Text Message – Short Message Service (SMS)

- If selecting ***Text Message – Short Message Service (SMS)*** as the **MFA Device Type**, enter the ***Phone Number*** that will be used to obtain the Security Code. Enter a brief description (e.g., Text) in the field labeled ***MFA Device Description.***



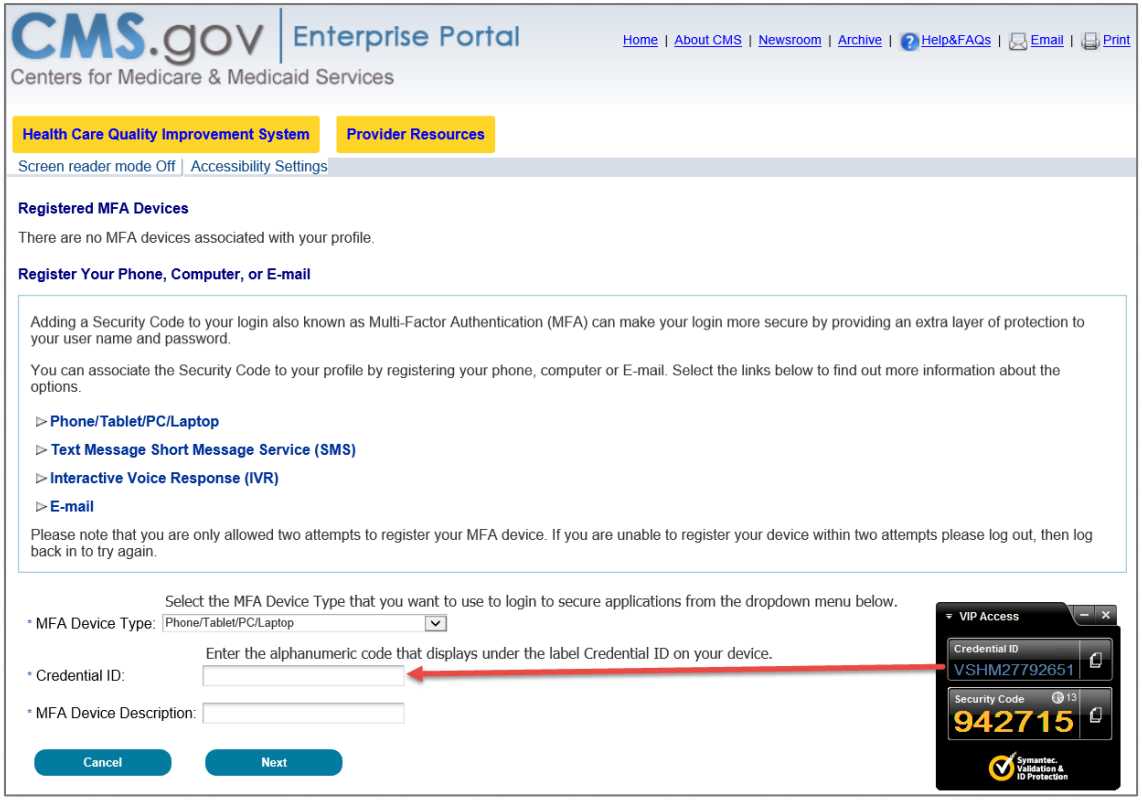
MFA Device Type: E-mail

- If selecting ***E-mail*** as the **MFA Device Type**, the E-mail address on your profile will be automatically used to obtain the Security Code. Enter a brief description (e.g., E-mail) in the field labeled ***MFA Device Description.***

MFA Device Type: Phone/Tablet/PC/Laptop

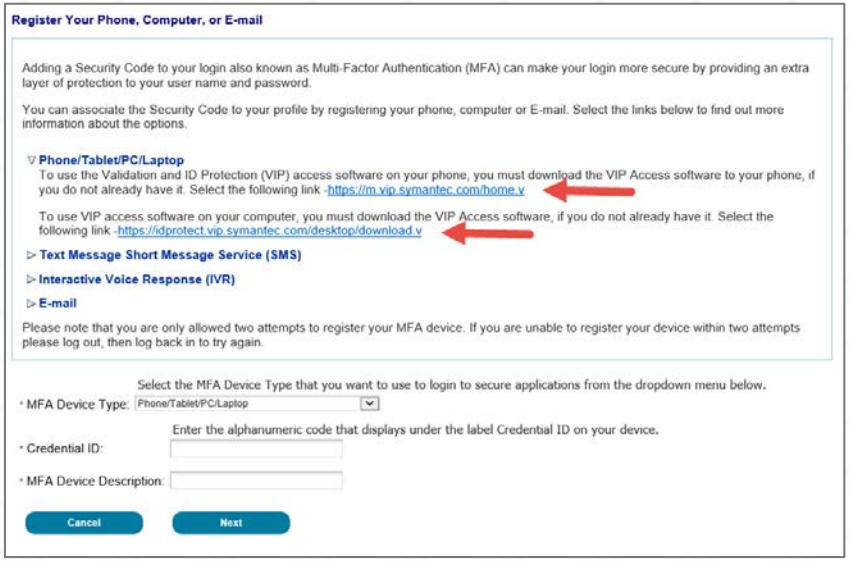
- If selecting ***Phone/Tablet/PC/Laptop*** as the ***MFA Device Type***, enter the alphanumeric code that displays under the field labeled Credential ID (on the VIP Access software) in the ***Credential ID*** field. Enter a brief description (e.g., Laptop) in the field labeled ***MFA Device Description.***

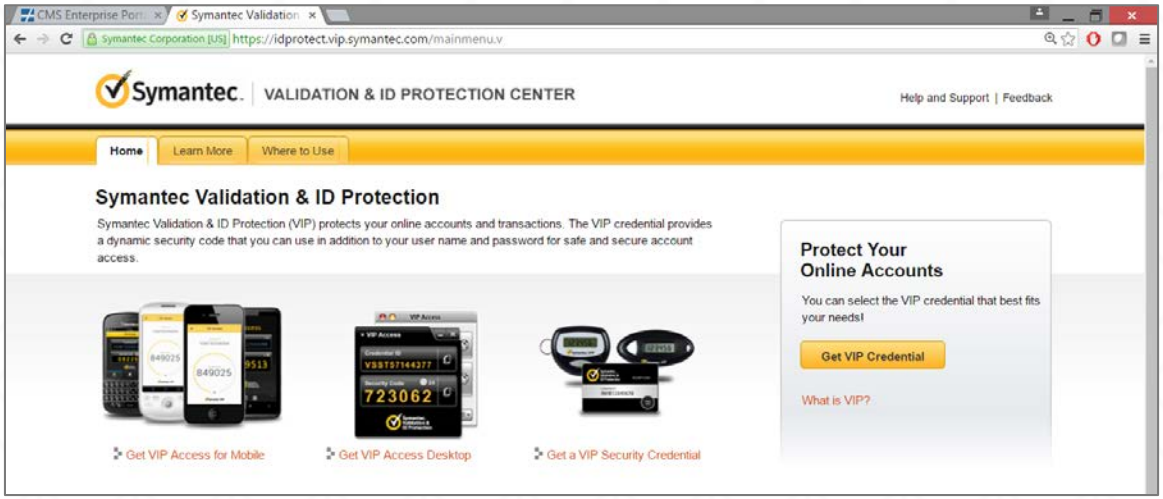
Note: Users can expand the ***Phone/Tablet/PC/Laptop*** option on the screen to find the link to download the VIP Access software.



Phone/Tablet/PC/Laptop – Download VIP Access Software

- Users can expand the ***Phone/Tablet/PC/Laptop*** option on the screen to find the link to download the VIP Access software.
- From Symantec website, download the VIP Access software for mobile or desktop devices.



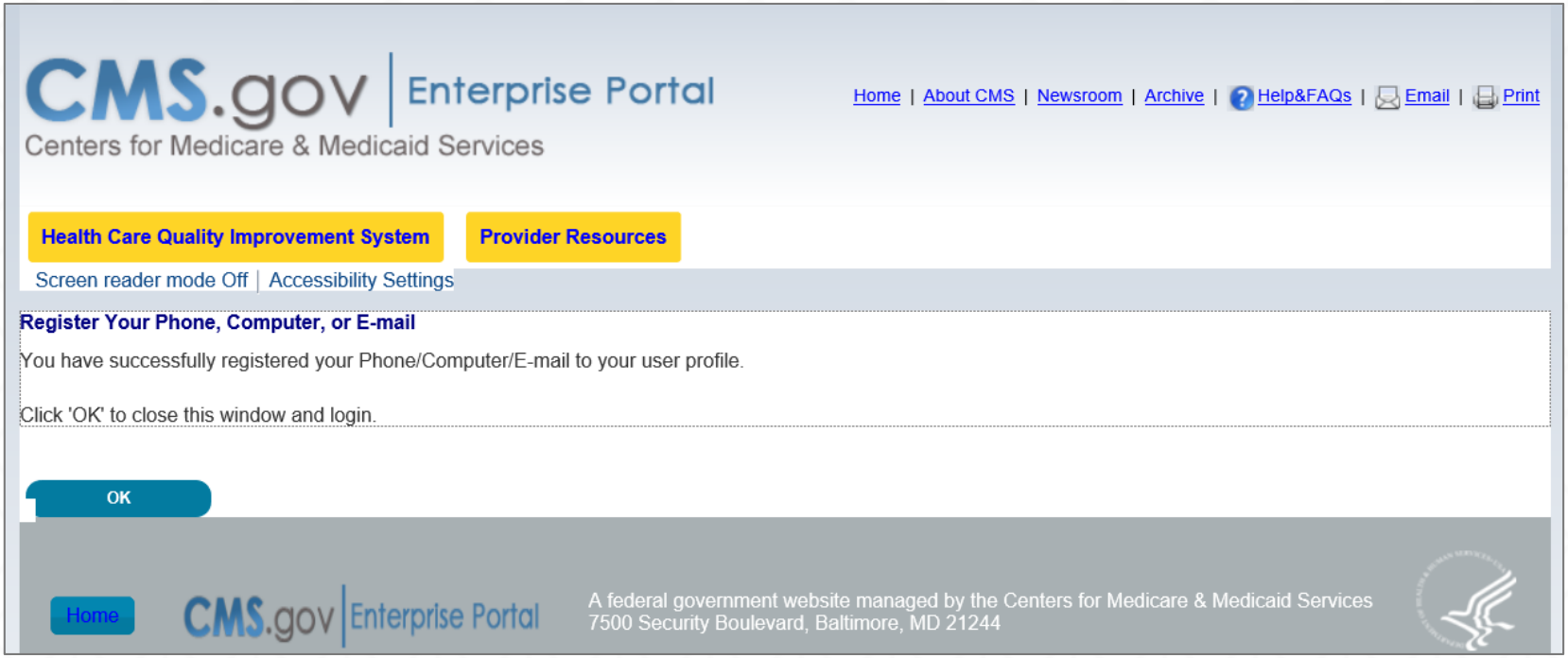


MFA Device Type: Voice Message – Interactive Voice Response (IVR)

- If selecting ***Voice Message – Interactive Voice Response (IVR)*** as the **MFA Device Type**, enter the ***Phone Number*** *and* corresponding ***Extension*** that will be used to obtain the Security Code. Enter a brief description (e.g., IVR) in the field labeled ***MFA Device Description.***

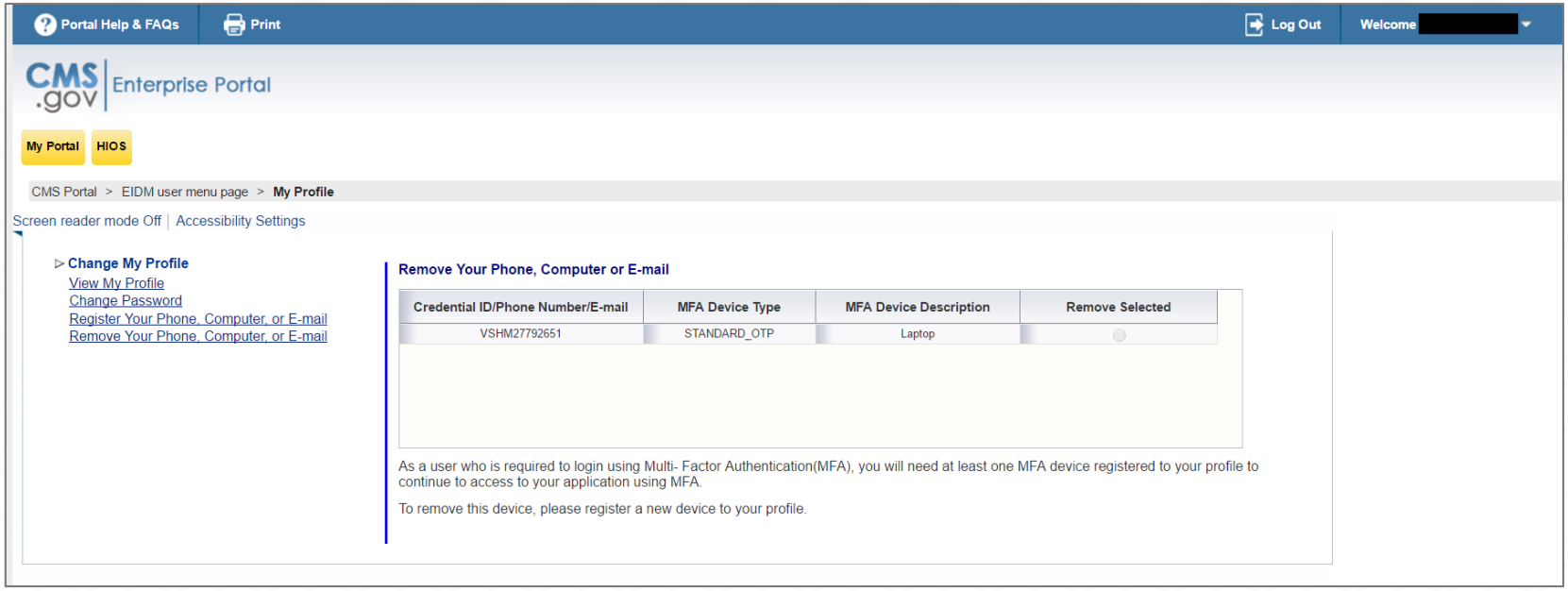
Successful MFA Device Registration

- Users will see an on-screen message confirming successful registration of the device to the user profile and receive an e-mail notification for successfully registering the MFA Device Type.



View Registered Devices

- To view the list of registered MFA devices, go to the CMS Portal > My Profile page and select the ***Remove Your Phone, Computer, or E-mail*** link.



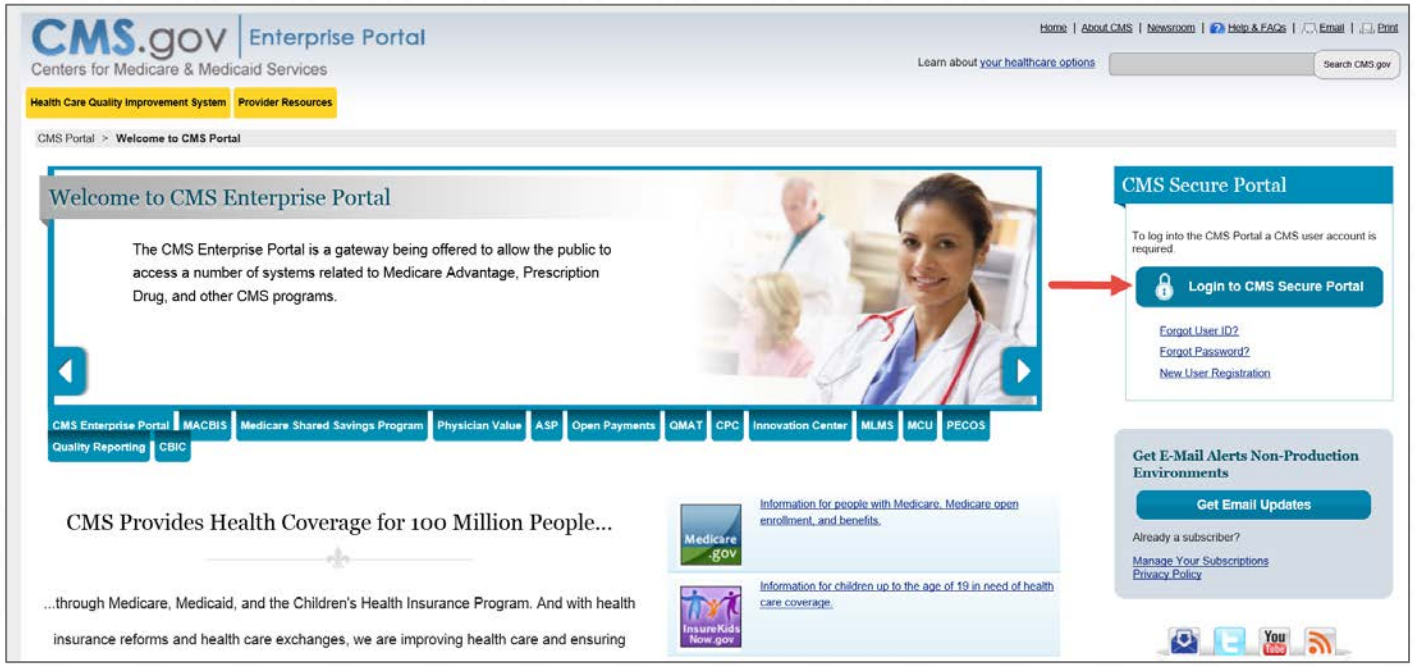
Logging into the CMS Enterprise Portal using MFA

Steps to Log in using MFA

1. Go to https://portal.cms.gov and select ***Login to CMS Secure Portal*** on the CMS Enterprise Portal.

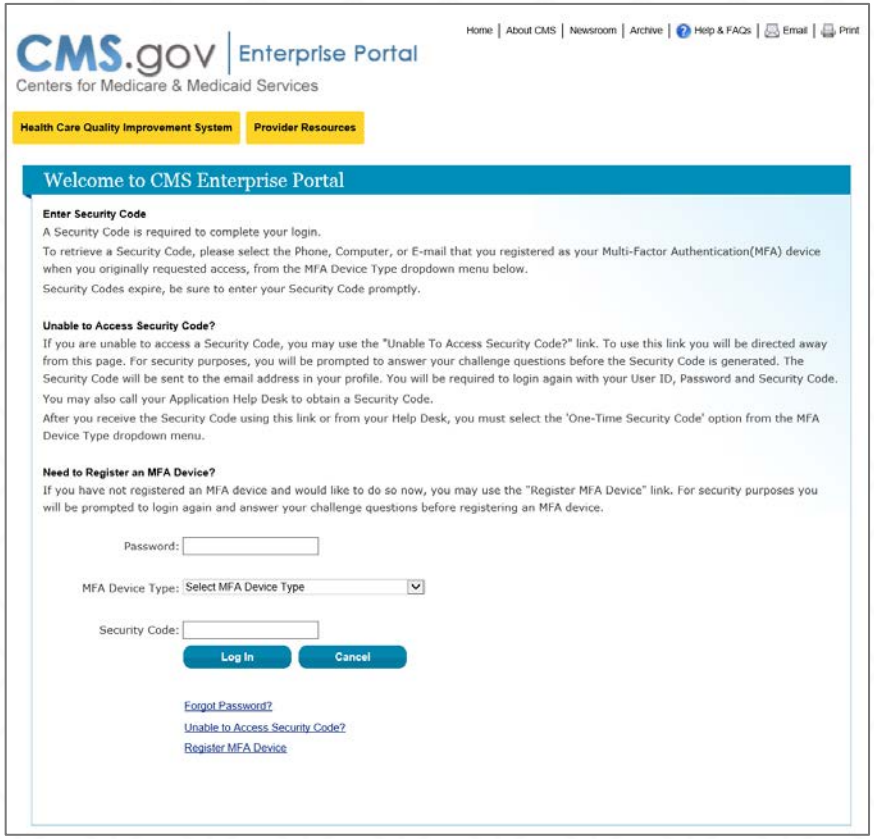
2. Read the Terms and Conditions and select ***I Accept*** to continue.

3. Enter your ***User ID*** and select ***Next.***



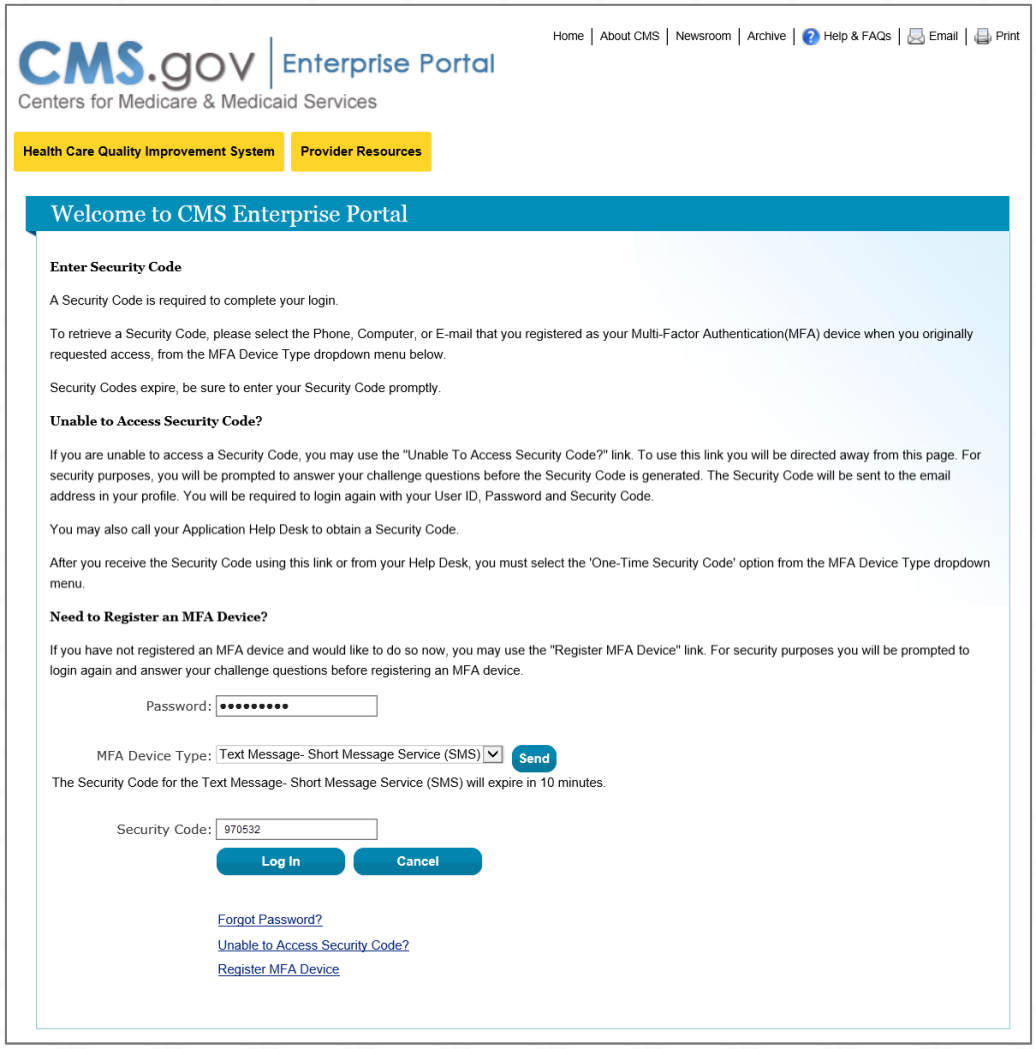
Steps to Log in using MFA

4. Enter your ***Password***, select an MFA device from the ***MFA Device Type*** dropdown menu, enter a ***Security Code***, and select ***Log In***.



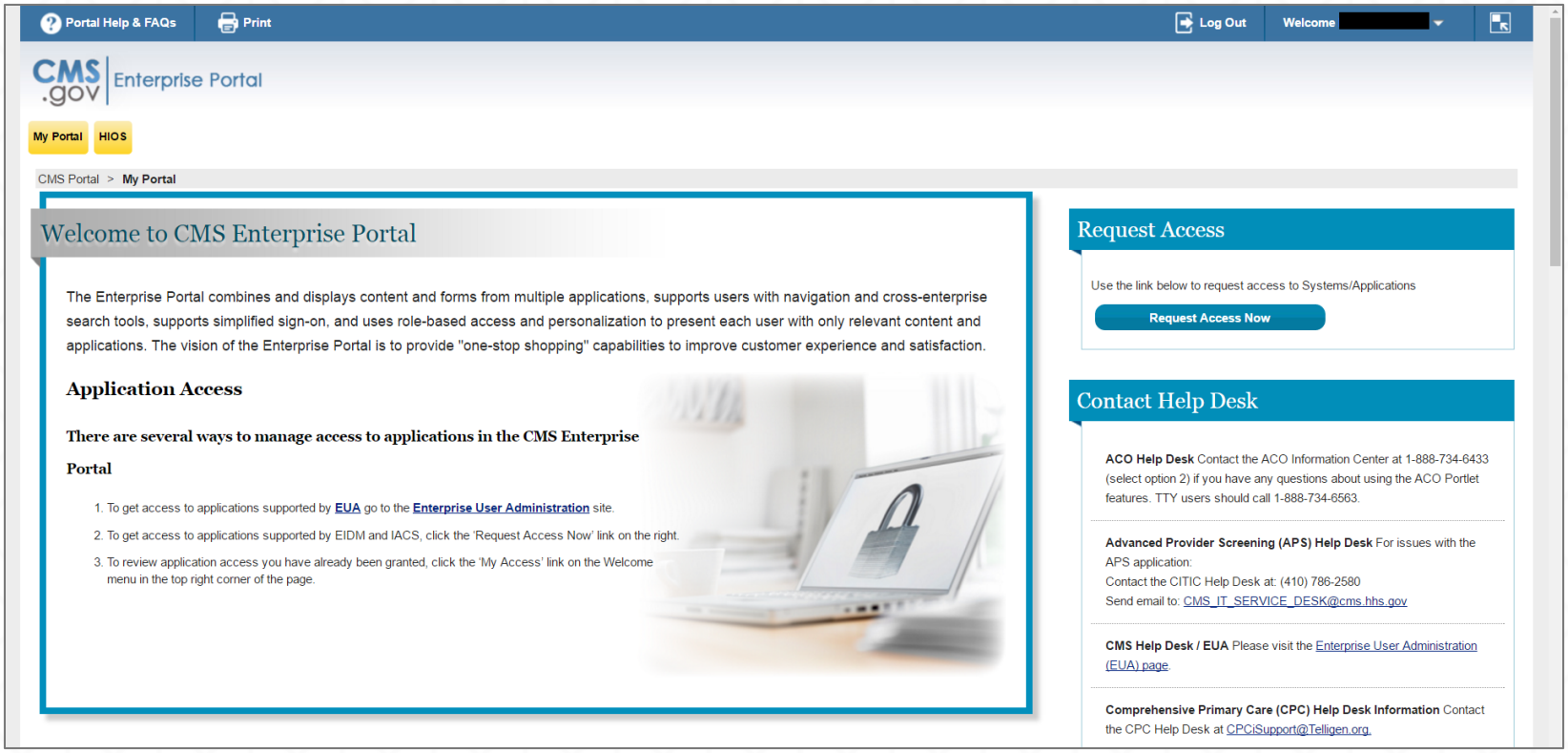
Example of Using Text Message - SMS Device Type to Log In

1. Enter your ***Password***.
2. Select the MFA Device Type: ***Text Message – Short Message Service (SMS)***.
3. Click the ***Send*** button. The Security Code will be sent to the registered device.
4. Enter the code into the ***Security Code*** field.
5. Click the ***Log In*** button to proceed.



Example of Using Text Message - SMS Device Type to Log In

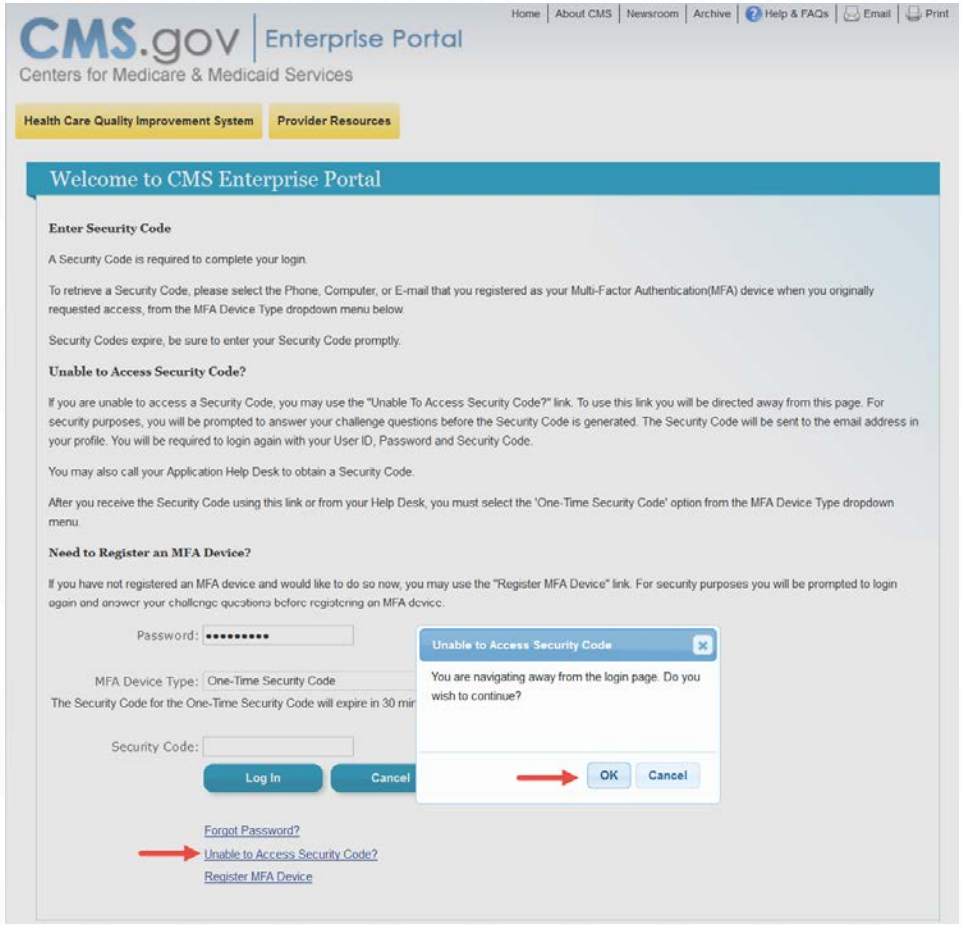
6. Users will arrive at the My Portal page and see the yellow “HIOS” button displayed on the dashboard to access HIOS.



Use of One-Time Security Code

If you are not able to access your Security Code, you can request a One-Time Security Code.

1. Select the ***'Unable to Access Security Code?'*** link. On selecting this link, the ***'Unable to Access Security Code'*** popup message will be displayed. Select ***OK*** to continue.



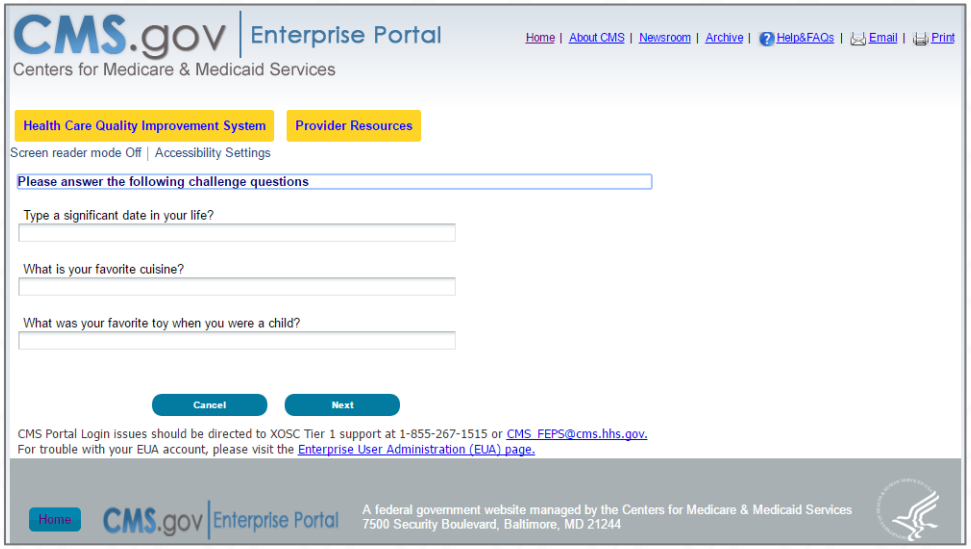
Use of One-Time Security Code

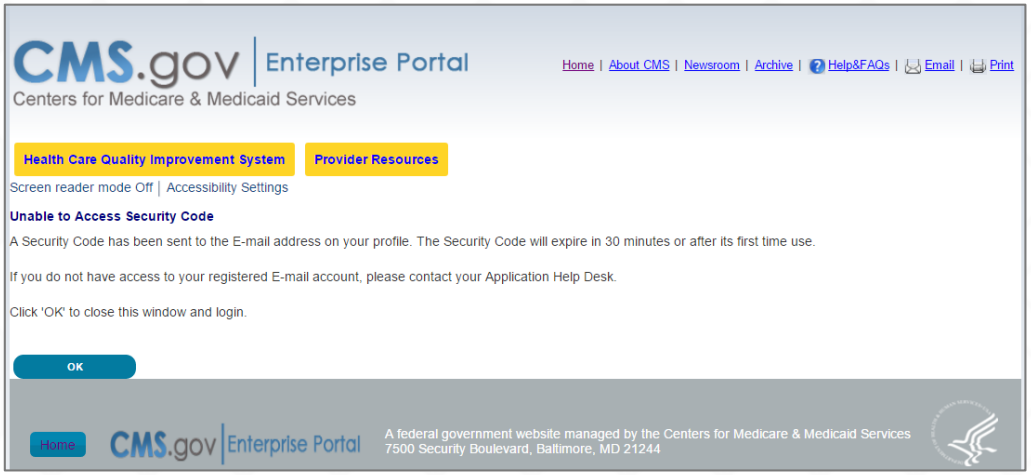
2. Enter your ***User ID*** and select ***Next***.

3. Answer the challenge questions and select ***Next***.

4. You'll see an on-screen message informing you that the Security Code has been sent to the E-mail address on your profile. Select ***OK*** to return to the login page.

Note: *This security code will expire in 30 minutes or after it is used successfully for the first time.*



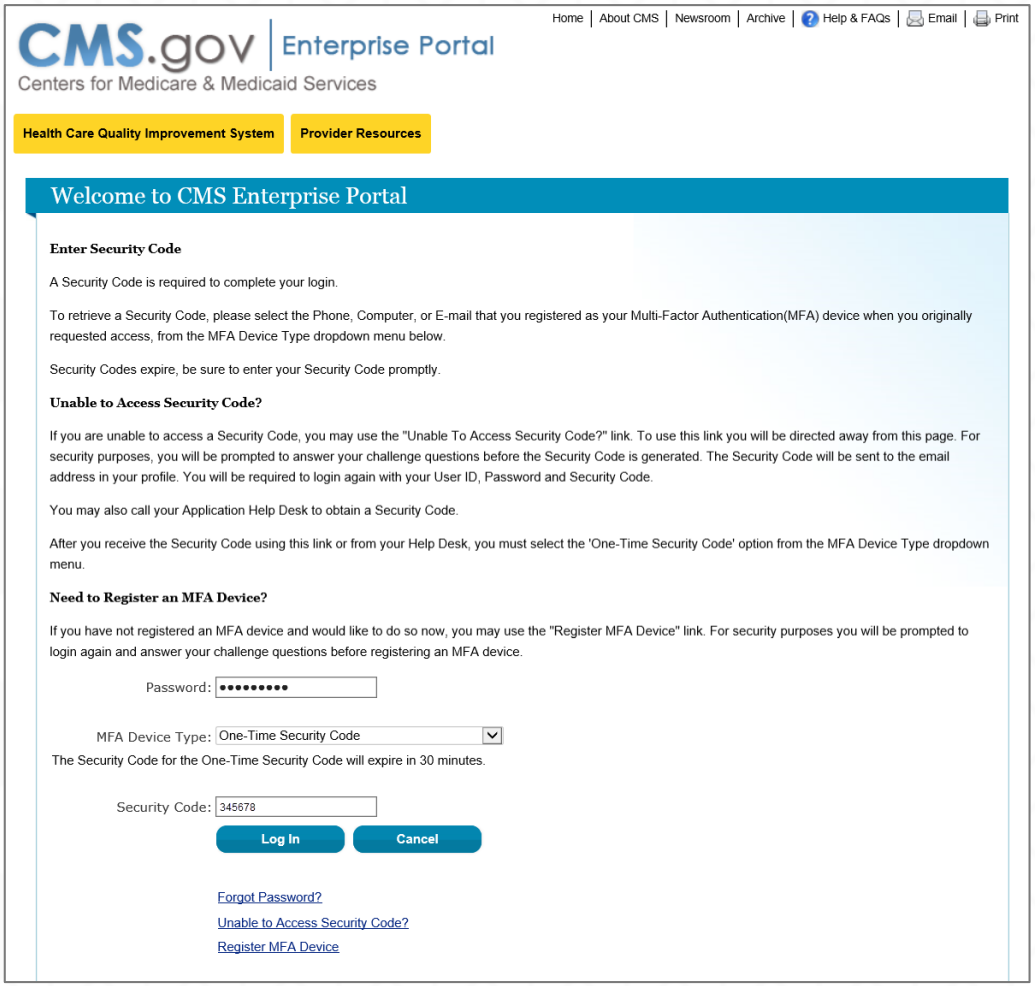


Use of One-Time Security Code

5. Read the Terms and Conditions and select ***I Accept*** to continue.

6. Enter your ***User ID*** and select ***Next***.

7. Enter your ***Password***, select ***One-Time Security Code*** as the ***MFA Device Type***, and enter the ***Security Code*** that was sent to the E-mail address on your profile. Then select ***Log In .***



MFA Device Removal

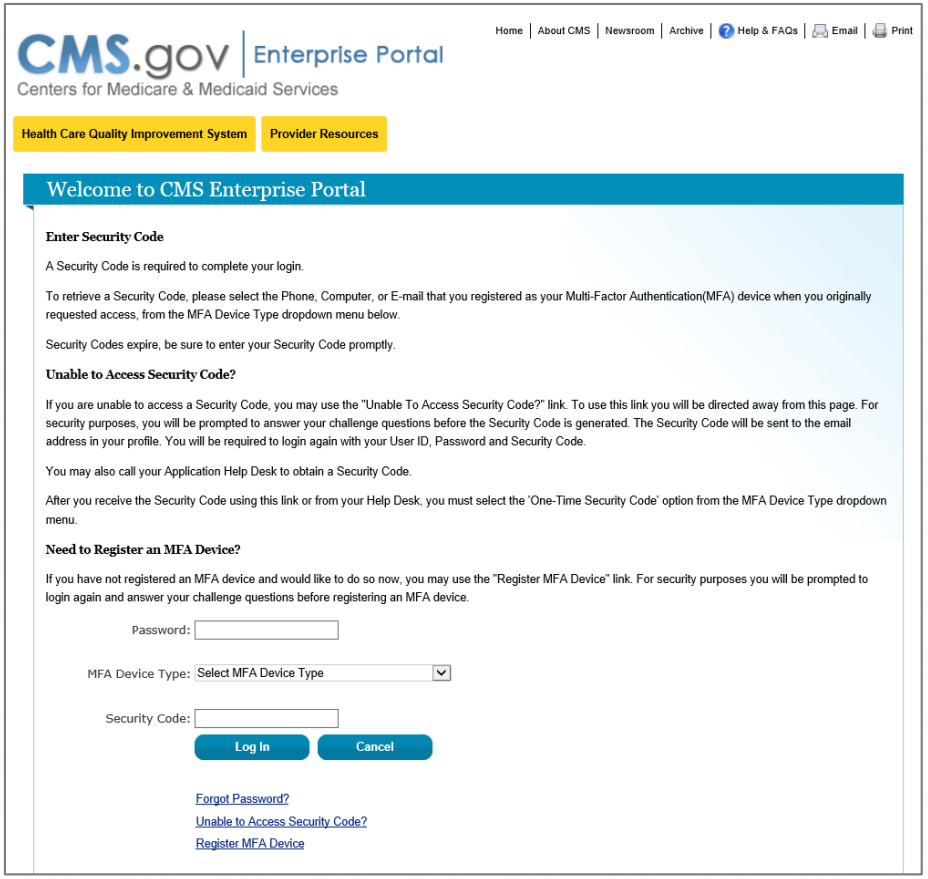
Steps to Remove an MFA Device

1. Go to https://portal.cms.gov and select ***Login to CMS Secure Portal*** on the CMS Enterprise Portal.

2. Read the Terms and Conditions and select ***I Accept*** to continue.

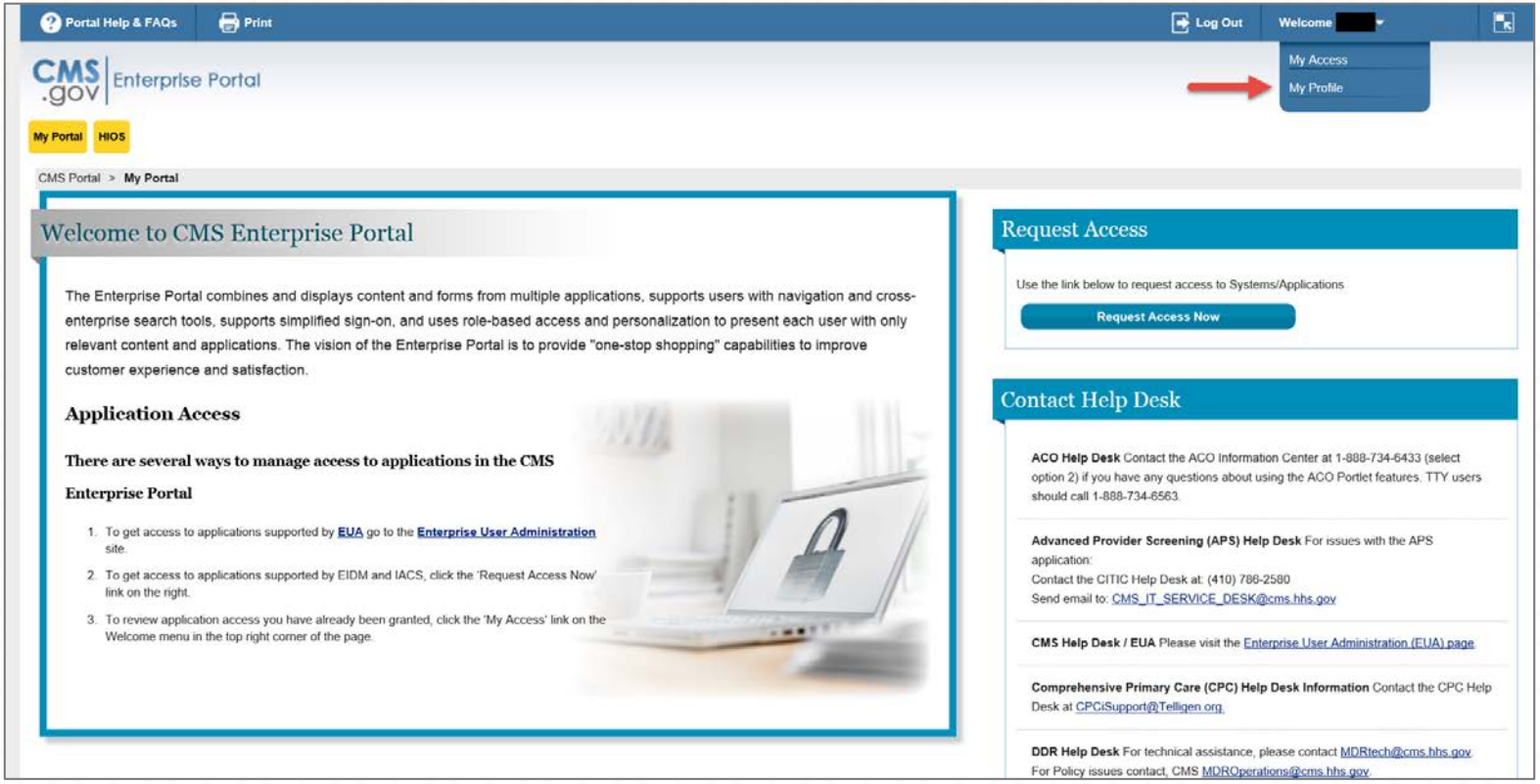
3. Enter your ***User ID*** and select ***Next.***

4. Enter your ***Password***, select an MFA device from the ***MFA Device Type*** dropdown, enter the ***Security Code***, and select ***Log In***.



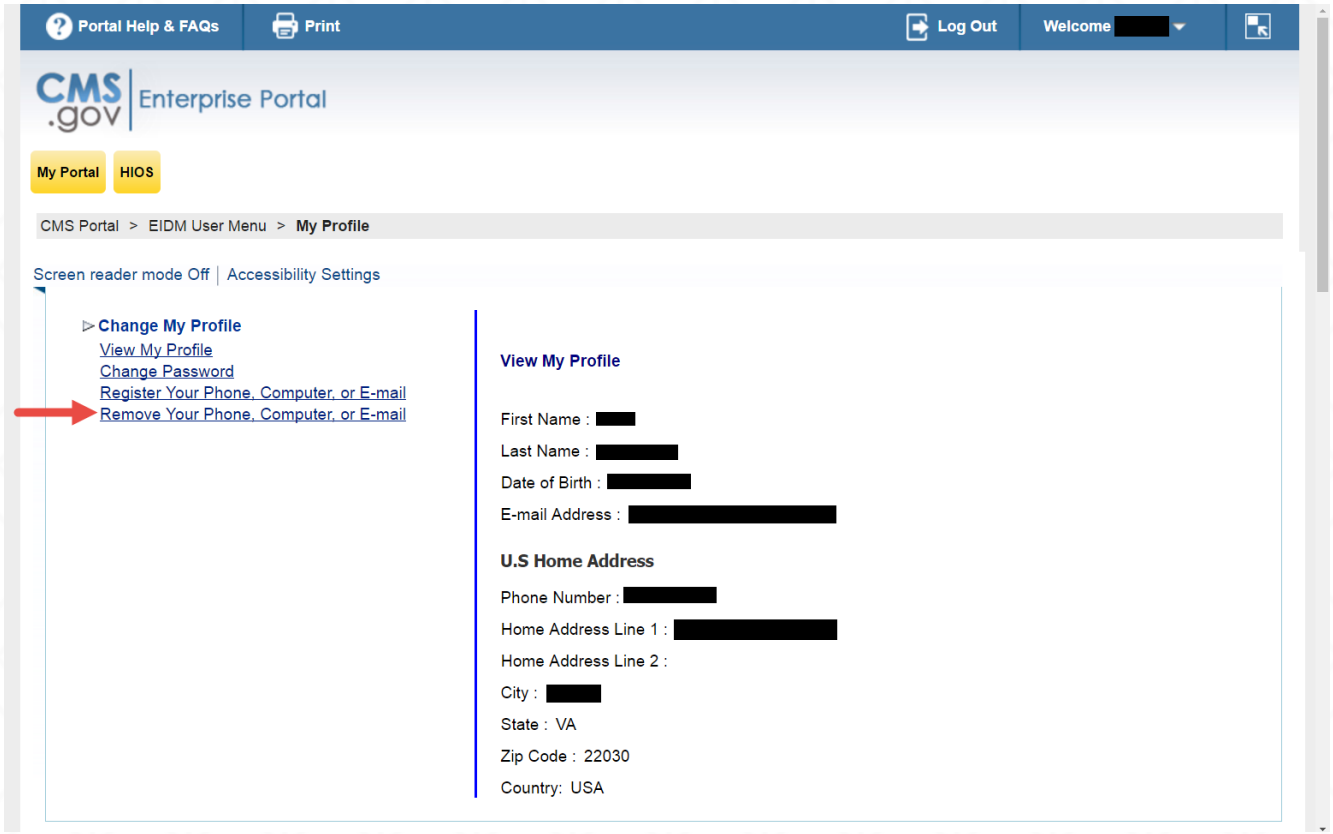
Steps to Remove an MFA Device

5. On the My Portal page, select your username and then select ***My Profile*** from the dropdown menu.



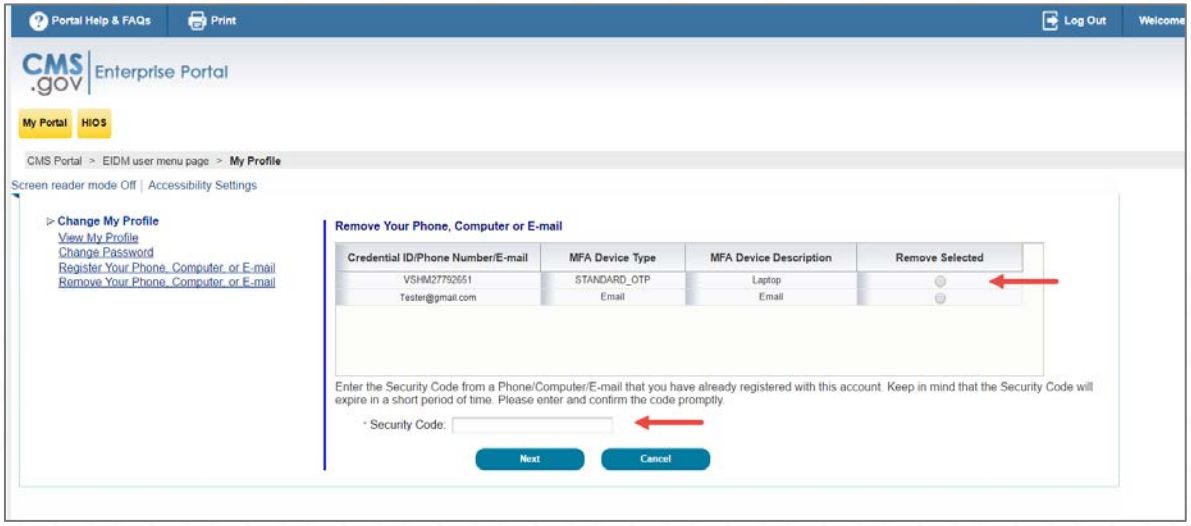
Steps to Remove an MFA Device

6. Select the ***Remove Your Phone, Computer, or E-mail*** link to remove a registered MFA device from your profile. Please note, you must have more than one device type registered before you can successfully remove an MFA device.



Steps to Remove an MFA Device

7. Select the radio button next to the device you wish to remove, select ***Send Security Code***, enter the security code received on the selected MFA Device Type, and select ***Next*** to proceed.



8. Removal of your registered MFA device is now complete. Select ***OK*** to proceed.

   Note: *You will receive an e-mail notification for successfully removing the MFA device.*

9. You will need at least one MFA device registered to your profile to continue to access your application using MFA. To remove the last registered device from your profile, you will need to register a new device to your profile.

User Support

- If you encounter any issues with your account or MFA device registration, please contact the Exchange Operations Support Center (XOSC) at CMS_FEPS@cms.hhs.gov or 1-855-267-1515.

- Additionally, for step-by-step instructions on how to register an MFA device, you may also visit: https://www.youtube.com/watch?v=y4HaapQPy2g&list=PLaV7m2-zFKpgYq_8AHW-FYM61J295xwLC&index=2

- Reference materials are available on the CCIIO website: https://www.cms.gov/CCIIO/Resources/Forms-Reports-and-Other-Resources/index.html#Content

Questions