CROWNWeb

The ESRD National Patient Registry & Quality Measure Reporting System

EIDM and QARM Quick Start Guide

CMS

CENTERS FOR MEDICARE & MEDICAID SERVICES

Contents

Introduction

The Enterprise Identity Management (EIDM) system allows users to apply for and receive a User ID that can be used to access multiple CMS applications. Once a user's initial information has been entered, they will be required to undergo a vetting process whereby data from their credit background will be used to verify their identity.

After a user's account is created in EIDM, the user must then go into the QualityNet Authorization and Role Management (QARM) to request access to CROWNWeb, REMIS, the ESRD QIP system, and other CMS applications. Through QARM, users can obtain direct access to authorized CMS systems. Facilities will also manage CROWNWeb user role and scope in QARM.

This Quick Start Guide contains procedures that will assist a user in performing tasks required to access a CMS application.

NOTE**:** Links that are preceded by a camera icon ( ) will open a graphic in a new window that provides a visual example of the step(s) being discussed.

Register in EIDM for a User ID and Password

1. Open your browser and go to https://portal.cms.gov. The *CMS Secure Portal* screen displays.
2. Click the **New User Registration** button. The *Step #1: Choose Your Application* screen displays.
3. Click the **down arrow** to the right of the field and select the *QARM: Quality Net Authorization & Role Management* link from the list presented. The *Terms & Conditions* displays.
4. Read the *Consent to Monitoring*, click the **I agree to the terms and conditions** checkbox and then click **Next**. The *Step #2: Register Your Information* screen displays.
5. Enter your information and then click **Next**. The *Step #3: Create User ID, Password & Challenge Questions* screen displays.
   NOTE: All fields not designated as (optional) are required fields and must be entered.
6. Enter the *User ID* and *Password* you would like to use for access to your applications, answer three challenge questions and then click the **Next**. The *Registration Summary* screen displays.
7. Click **Submit User**. The *Confirmation* screen displays.
   NOTE: A *confirmation email* is sent to the email address you registered with the User ID you created.

Request access to QARM, Identity Verification and Multi-Factor Authentication

1. Open your browser and go to https://portal.cms.gov. The *Enterprise Portal* screen displays.
2. Enter your *User ID* and *Password,* click the **Agree to Terms & Conditions** checkbox and then click **Login.** The *Request/Add Apps* screen displays.
3. Click the *Request/Add Apps* button. The *My Access* screen displays a list of applications.
4. Click in the *Access Catalog* field and begin to type **QualityNet Authorization and Role Management**. The screen refreshes and displays the *QualityNet Authorization and Role Management (QARM)* application.
5. Click on the *QualityNet Authorization and Role Management (QARM)* **Request Access** button. The *Request New Application Access* screen displays.
6. Click the **Down Arrow** to the right of the *Select a Role* field and select ***QualityNet User*** from the list displayed. The *Request New Application Access* screen refreshes.
7. Enter the required fields and then click **Next**. The *Identity Verification* screen displays.
8. Read the information on the screen, and then click **Next**. The *Terms and Conditions* screen displays.
9. Read the *Terms and Conditions*, and then click the **I agree to the terms and conditions checkbox**. The *Next* button becomes active.
10. Click the **Next** button. The *Your Information* screen displays.
11. Enter your information, and then click **Next**. The *Verify Identity* screen displays your credit information from Equifax.
    NOTE: Your *Social Security Number* is a required field.
12. Make the appropriate selections, and then click **Next**. The *Complete Step Up* screen displays.
    NOTE: Some of the questions may not apply to you or the selections available are not correct. In such cases, select the answer **NONE OF THE ABOVE/DOES NOT APPLY**. You only have 10 minutes to complete the Identity Verification. If you do not complete it within the given time frame, you must begin the Identity Verification process again.
13. Click **Next**. The *Multi-Factor Authentication Information* screen displays.
14. Click **Next**. The *Register Multi-Factor Device* screen displays.
15. Click the **down arrow** to the right of the *Choose MFA Device Type* field and select the *MFA Device* desired from the list presented.
16. Enter required fields, and then click **Next**. The *Confirmation* screen displays, and a confirmation email is sent to your address on file.
17. Click **Next**. The *Request New Application Access* screen displays.
18. Enter required *Business Contact Information*, and then click **Next**. The *Request New Application Access* screen asks for a *Reason for Request*.
19. Enter the reason, and then click **Next**. The *Request New Application Access Review* screen displays.

20. Review the information, and then click **Submit**. The *Request New Application Access Acknowledgement* screen displays. Click **OK**.
21. The *View and Manage My Access* screen displays.
    NOTE: Access to the QARM Application is automatic – It will take approximately 10 minutes before you have access.

Submit a request to be an Organization Security Official or an End User

1. Open your browser and go to https://www.qualitynet.org. The *QualityNet Home* screen displays.
2. Click the **Log In** button. The *Choose Your QualityNet Destination* screen displays.
3. Click the **arrow** to the right of the **Select Your QualityNet Destination** field and select *End Stage Renal Disease Quality Reporting System* from the drop down select list and then click Let's Go link in the menu. The *System Use Notification* screen displays.
4. Read the *System Use Notification* and then click **I Accept**. The *Welcome to CMS Enterprise Portal* screen displays.
5. Enter your *User ID* and then click **Next**. The *Password* screen displays.
6. Enter your *Password*, select the desired *MFA Device Type*, enter the *MFA Security Code* and then click **Log In**. The *Welcome* screen displays.
   NOTE: Depending upon the MFA Device Type selected, you may need to click **Send** in order for the code to be sent to your selected device.
7. Click the **Down Arrow** to the right of *User Profile* and select **My Account** from the menu displayed. The *Quality Reporting Systems: My Tasks* screen displays.
8. Click **Request My Access** under the *Manage My Access* group. The *Request User Access* screen displays.
9. Click the **Down Arrow** to the right of the *Program* field and select *End Stage Renal Disease Quality Reporting System*.
10. Click the **Magnifying Glass** to the right of the *Organization* field. The *Search Organizations* screen displays.
11. For an Organization Security Official, enter information to find the desired facility. Under the *Org Type* field select **QARM Org Security** and then click **Search**. Click the **desired facility name**, and then click **OK**.
12. For an End User, enter the **Facility Name** in the *Org Name* field and under the *Org Type* field select **ESRD QIP Facility** and then click **Search**. Click the **desired facility name** and then click **OK.**
13. Click the **Down Arrow** to the right of the *User Role* field and select the desired role.
    NOTE: For *Organization Security Official*, select **Organization Security Official**. For an *ESRD QIP User* select **Facility POC** or **Facility Viewer**.
14. Click the **Down Arrow** to the right of the *Approvers* field and select the *Security Official* who will approve your request.
    NOTE: For the *Initial Organization Security Official*, the approver will be a COR Security Official. For backup *Security Officials* and *End Users*, the approver will be an *Organization Security Official* at your facility.
15. Click **Submit Request**. The *Submit Request Confirmation* pop up dialog box displays.
16. Click **OK**. The screen displays your *Request ID.*
17. Record your **Request ID -** you will receive a confirmation email at the email address you registered with containing this *Request ID* that confirms submission.

Approve a request for a Backup Organization Security Official or an End User

1. Open your browser and go to https://www.qualitynet.org. The *QualityNet Home* screen displays.
2. Click the **Log In** button. The *Choose Your QualityNet Destination* screen displays.
3. Click the **arrow** to the right of the **Select Your QualityNet Destination** field and select *End Stage Renal Disease Quality Reporting System* from the drop down select list and then click Let's Go link in the menu. The *System Use Notification* screen displays.
4. Read the *System Use Notification* and then click **I Accept**. The *Welcome to CMS Enterprise Portal* screen displays.
5. Enter your *User ID* and then click **Next**. The *Password* screen displays.
6. Enter your *Password*, select the desired *MFA Device Type*, enter the *MFA Security Code* and then click **Log In**. The *Welcome* screen displays.
   NOTE: Depending upon the MFA Device Type selected, you may need to click **Send** in order for the code to be sent to your selected device.
7. Click the **Down Arrow** to the right of *User Profile* and select **My Account** from the menu displayed. The *Quality Reporting Systems: My Tasks* screen displays.
   NOTE: If you need to change role and scope, refer to Change Facilities.
8. Click **Approve User Request** under the *Manage User Access* group. The *Oracle Business Process Workspace* screen displays.
9. Double click the desired **Access Request**. The *Approve Authorization Request* screen displays in a new window.
10. Make change to the User Role if required, add any *Comments* and then click **Next**. The *Select Course Grained Application Roles* screen displays high level authorization options.
11. Click **Next**. The *Fine Grained Application Roles* screen displays additional authorization options.
12. Click **Next**. The final *Approve Authorization Request* screen displays.
13. Click **Approve Request**. The *Approval Comments* dialog box displays.
14. Enter any comments, and then click **OK**. The screen refreshes and is blank.
15. Close the open window and refresh the *Business Process Workspace* screen and the selected request is removed from the list.
   NOTE: The user will receive email notification when the request has been approved.

Log in to REMIS, CROWNWeb or ESRD QIP

1. Open your browser and go to https://www.qualitynet.org. The *QualityNet Home* screen displays.
2. Click the **Log In** button. The *Choose Your QualityNet Destination* screen displays.
3. Click the **arrow** to the right of the **Select Your QualityNet Destination** field and select *End Stage Renal Disease Quality Reporting System* from the drop down select list and then click Let's Go link in the menu. The *System Use Notification* screen displays.
4. Read the *System Use Notification* and then click **I Accept**. The *Welcome to CMS Enterprise Portal* screen displays.
5. Enter your *User ID* and then click **Next**. The *Password* screen displays.
6. Enter your *Password*, select the desired *MFA Device Type*, enter the *MFA Security Code* and then click **Log In**. The *Welcome* screen displays.
   NOTE: Depending upon the MFA Device Type selected, you may need to click **Send** in order for the code to be sent to your selected device.
7. Click the **Down Arrow** to the right of *User Profile* in the menu bar and select **User Accessibility** from the menu displayed. The *User Preferences, User Roles and Organization Switch* tabs display.
   NOTE: If you only have scope over one facility or the desired facility is currently displayed under your name, skip this step and go to step 12.
8. Click the **Organization Switch** tab. The *Organization Switch* screen displays.
9. Click the **Down Arrow** to the right of the *Change Program* field and select **EQRS** from the list.
10. Click the **Down Arrow** to the right of the *Change Organization* field and select the desired facility and role, and then click **Update**.
11. Click the **Update** button. A confirmation dialog box displays asking "*Do you want to switch current Organization?*"
12. Click **Yes**. The *Welcome* screen displays once again.
13. Click the **Down Arrow** to the right of *Quality Programs* in the menu bar and select **End Stage Renal Disease Quality Reporting System** from the list presented. The *Quality Reporting Systems: My Tasks* screen displays.
14. Click the **REMIS** link, **Facility Dashboard - CROWNWeb SUI** link or the **Inquiry** link depending upon whether you selected a CROWNWeb or an ESRD QIP role. The *CROWNWeb Dashboard* screen displays if you selected a CROWNWeb role or the *Inquiry Portlet* screen displays if you selected an ESRD QIP role.

Change Facilities

1. Log In to ESRD QIP and then click the **Down Arrow** to the right of *User Profile* in the menu bar and select **User Preferences** from the menu displayed. The *User Accessibility, User Roles and Organization Switch tabs* displays.
2. Click the **Organization Switch** tab. The *Organization Switch* screen displays.
3. Click the **Down Arrow** to the right of the *Change Program* field and select **EQRS** from the list.
4. Click the **Down Arrow** to the right of the *Change Organization* field and select the desired facility and role.
5. Click the **Update** button. A confirmation dialog box displays asking "*Do you want to switch current Organization?*"
6. Click **Yes**. The *Welcome* screen displays once again.

Change Password

NOTE: You must change your password at least every 60 days. If you are getting close to that point, you will receive email notification beginning seven days before your password expires.

1. Click on the hyperlink in the email notification. The *CMS Secure Portal* screen displays.
2. Enter your *User ID* and *Password.* The CMS Secure Portal screen refreshes.
3. Choose an *MFA Device*, click the **Agree to our Terms & Conditions** checkbox and then click the **Login** button. The My Portal screen displays.
   NOTE: Depending upon the *MFA Device Type* selected, you may need to click **Send** in order for the code to be sent to your selected device.
4. Click the **down arrow** to the right of your name. A *drop down list* displays.
5. Click **My Profile**. The *View My Profile* screen displays.
6. Click **Change Password**. The *Change Password* screen displays.
7. Enter your old password, enter your new password twice, and then click **Submit**. The *Change Password* screen displays the message "Your password has been successfully changed. A confirmation E-mail has been sent. You will need to logout and login with your new password to access the system. Select 'Ok' to login using your new password."
8. Click **OK**. The *CMS Secure Portal* screen displays.
9. You will receive a confirmation email that your password has been changed.