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Overview
This document provides instructions for Medicaid & CHIP Program (MACPro) System users to obtain an Identity Management (IDM) System User ID and to request access to MACPro. Additionally, this document describes how users can perform common tasks in IDM, such as resetting a forgotten password, unlocking a user account, and recovering a forgotten User ID.

NOTE: The images in this document were taken in training environment. The content in the images are not reflective of actual data.

What is MACPro? What is IDM?
MACPro is a web-based system that allows the Centers for Medicare & Medicaid Services (CMS) and states to collaborate more effectively online in support of Medicaid and Children’s Health Insurance Program (CHIP) initiatives, including quality measures reporting and SPA processing.

The IDM System provides the means for users to be approved to access many other CMS systems and applications. IDM governs access to CMS systems by managing the creation of user IDs and passwords, setting up multi-factor authentication (MFA), and the assignment of roles within CMS applications.

Getting Started: Tips and Q&A
• How do MACPro and IDM work together from a user’s perspective? When users go to MACPro at https://macpro.cms.gov, an IDM sign-in screen will appear. After entering their IDM User ID and password, they will be logged in to MACPro.

• Can users select a link or a tile within IDM that would take them to MACPro? MACPro can be accessed only directly via https://macpro.cms.gov. MACPro cannot be accessed from within IDM.

• What type of role or access should MACPro users request in IDM? MACPro users will request the following in IDM: (1) application access to MACPro, and (2) the applicable IDM role for MACPro.
  o All state users should request the MACPro State User role (unless otherwise notified)
  o All CMS users should request the MACPro CMS Staff User role (unless otherwise notified)

• Where do users request roles like State Editor, State Point of Contact, and CMS Point of Contact? MACPro-specific user roles must be requested directly in MACPro at https://macpro.cms.gov.

• Are MACPro users required to use MFA or Recovery devices? MFA is not required for MACPro, but it may be required for other CMS system applications registered to a user’s account. Additionally, all users are required to have a registered Recovery device, which can be used for IDM self-service account-access features. Users are highly encouraged to have multiple MFA and/or Recovery devices registered to their account.

• When would users go directly to MACPro vs directly to IDM? Here are some additional examples:
  o Go to https://macpro.cms.gov to complete tasks and actions related to creating, submitting, and/or reviewing State Plan Amendment (SPA) submission packages or Quality Measures reports.
  o Go to https://home.idm.cms.gov to change a security question and answer, update personal or business contact information, or manage MFA and Recovery device information.

Getting Help
The MACPro help desk is available to assist from 9:00 AM to 5:00 PM Eastern Time, Monday through Friday. To contact the help desk:
• Call (833) 228-2540
• Email MACPro_HelpDesk@cms.hhs.gov

Please also contact the MACPro help desk with any feedback, comments, and suggestions about this reference document and other MACPro training and reference materials.
**IDM Roles for MACPro**

The table below displays a summary of IDM roles for MACPro, which users will request within IDM. The table also shows the role approval hierarchy.

<table>
<thead>
<tr>
<th>IDM Role for MACPro</th>
<th>Role Description</th>
<th>Role Request Approved By</th>
</tr>
</thead>
<tbody>
<tr>
<td>MACPro State User</td>
<td>U.S. State and Territories users. This role grants users access to MACPro application's state workflow and application’s state reports. All <strong>state</strong> users should request the <strong>MACPro State User</strong> role (unless otherwise notified)</td>
<td>MACPro Approver</td>
</tr>
<tr>
<td>MACPro CMS Staff User</td>
<td>CMS Central and Regional Office Staff users. This role grants users access to MACPro application’s CMS workflow and non-management reports. All <strong>CMS</strong> users should select the <strong>MACPro CMS Staff User</strong> role (unless notified otherwise)</td>
<td>MACPro Approver</td>
</tr>
<tr>
<td>MACPro Approver</td>
<td>CMS Central and Regional Office Staff users. This role is responsible for approving IDM roles requested for CMS Central and Regional Office users. This approver role does not approve role requests within the MACPro application.</td>
<td>MACPro Business Owner</td>
</tr>
<tr>
<td>MACPro Business Support User</td>
<td>Non-CMS MACPro users. This role is for CMS contractors who need access to the MACPro application.</td>
<td>MACPro Approver</td>
</tr>
<tr>
<td>MACPro Help Desk</td>
<td>CMS MACPro help desk users. This role is responsible for regular help desk activities like Reset Password, Unlock Account, etc.</td>
<td>MACPro Business Owner</td>
</tr>
<tr>
<td>MACPro Business Owner</td>
<td>This is a restricted role for CMS users who are responsible for approving MACPro Help Desk and MACPro Approver role requests in IDM. This role will not be available for selection for the general user population.</td>
<td>IDM Tier 2 Help Desk</td>
</tr>
</tbody>
</table>
Obtaining Access to MACPro

Below is an overview listing of the steps required for users to obtain access to MACPro. Users will be able to sign in to MACPro once the role request submitted in Step 4 is approved. Details on completing the below steps are available in the following subtopics of the same name.

- **Step 1**: Register & Create an IDM Account
- **Step 2**: Initiate Role Request for MACPro Access
- **Step 3**: Complete Remote Identity Proofing (RIDP)
- **Step 4**: Complete, Review & Submit Role Request
Step 1: Register & Create an IDM Account
If users already have an IDM User ID, they can skip to Step 2: Initiate Role Request for MACPro Access. Users can sign in to IDM immediately registering an account.

1. Select the **New User Registration** button on the IDM sign-in screen.

![New User Registration button](image1)

2. Enter the personal and address information requested on the next two screens. Also select the “I agree to the terms and conditions” checkbox.

![Personal Information Screen](image2)  ![Address Information Screen](image3)

3. Enter a **User ID** and **password** and select a **security question** and an **answer**. Then select the **Submit** button.

![User ID, Passwords, Security Question Answer](image4)
Step 2: Initiate Role Request for MACPro Access

Users can sign in to IDM immediately after registering and creating an account. From that point, users will next request the applicable IDM role for MACPro. For a description of all roles, refer to the IDM Roles for MACPro topic.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the Role Request tile.

![Image of Role Request Tile]

Figure 5: Role Request Tile

3. Select MACPro - Medicaid and CHIP Program System from the Select an Application drop-down list.

![Image of Select an Application dropdown list]

Figure 6: Select an Application drop-down list

4. Select the applicable role in the Select a Role drop-down list, as follows:
   - All state users must request the MACPro State User role (unless otherwise notified)
   - All CMS users must request the MACPro CMS Staff User role (unless otherwise notified)

![Image of Select a Role dropdown list]

Figure 7: Select a Role drop-down list
Step 3: Complete Remote Identity Proofing (RIDP)
Remote Identity Proofing (RIDP) is a process that is used to verifying identity online. Most users will be required to complete RIDP (also known as identity verification) upon selecting a role to request in IDM (per the steps in the prior topic, “Step 2: Initiate Role Request for MACPro Access”). If users are not prompted to complete RIDP, they can skip to the Step 4: Complete, Review & Submit Role Request topic.

NOTE:
- If online identity verification completes successfully, users will automatically be routed to a screen to select role attributes and to review and submit the role request. Instructions are in the Step 4: Complete, Review & Submit Role Request topic.
- If online identity verification fails, users should refer to the Resolving RIDP Errors topic for additional options.

1. View and agree to the terms and conditions. Then select the Next button.

![Identity Verification screen](image)

**Figure 8: Identity Verification screen**

2. Complete the Remote Identity Proofing form. Then select the Next button in the lower-right corner of the screen.

![Remote Identity Proofing form](image)

**Figure 9: Remote Identity Proofing form**

3. Answer the RIDP proofing questions as applicable. Then select the Verify button.

![RIDP Proofing Questions](image)

**Figure 10: RIDP Proofing Questions**
Resolving RIDP Errors
If the Remote Identity Proofing (RIDP) identity verification process fails online, additional identity verification could be attempted via phone proofing, and, in some cases, manual proofing.

If online identity proofing fails
1. Users should write down the Review Reference Number that appears in the error message on their screen (see below for an example of the error message).

![Remote Identity Proofing error](image)

2. Select the Cancel button on the “Remote Identity Proofing” screen.
3. Select the Confirm button on the “Cancel Role Request Process” screen.

If identity proofing via phone is successful
1. Re-initiate the role request in IDM (see the Step 2: Initiate Role Request for MACPro Access topic for details).
2. Select the "I have already verified my identity with Experian" checkbox. Then select the Next button.
3. Confirm the content on the Identity Information Verification screen is correct.
4. Select the Next button to continue with the role request process.

If identity proofing via phone fails
1. Re-initiate the role request in IDM (see the Step 2: Initiate Role Request for MACPro Access topic for details).
2. Select the Try Again button on the “The User data does not match the data from Experian” prompt.
3. Review the content on the Identity Information Verification screen.
4. Select the Next button to continue the role request process.
5. If an error message appears again, take a screenshot of the entire screen (including the URL).
6. Select the Return button, and then cancel the role request.
7. Email the screenshot to the MACPro help desk for manual identity proofing.
Step 4: Complete, Review & Submit Role Request

Upon successfully completing identity verification, users will be routed to the screens described below to complete, review, and submit the role request. Once the role request submitted in this step is approved, users will then be able to access MACPro.

1. Select the applicable role attributes via the drop-down lists. Then select the **Review Request** button.

   ![Figure 14: Role Attributes drop-down lists](image)

2. Complete the **Reason for Request** text box. Then select the **Submit Role Request** button.

   ![Figure 15: Text box for role request justification](image)
IDM Self-Service Account Features

IDM self-service features allow users to perform select account-access processes without requiring assistance from the MACPro help desk. To use the self-service features, which are listed below, users must (1) remember their security question answer, and (2) have an active recovery device active their user profile.

- Resetting a forgotten password
- Recovering a forgotten User ID
- Unlocking a locked account
- Changing an expired password

Links to the self-service features for resetting a forgotten password, recovering a forgotten User ID, and unlocking an account are available via the respective Password, User ID, and Unlock links on the IDM sign-in screen (as shown below). Whereas the self-service feature for changing an expired password will automatically appear to users upon an attempt to sign in with an expired password.

![Self-service account-access links](image.png)

*Figure 16: Self-service account-access links*
Resetting a Forgotten Password

Users can initiate the self-service reset forgotten password process via the Password link on the IDM sign-in screen.

NOTE: Users must remember their security question answer to complete this process.

1. Select the Password link on the IDM sign-in screen at https://home.idm.cms.gov/

![Figure 17: Self-Service Password link](image)

2. Enter the User ID and select the applicable recovery method.

![Figure 18: Reset Password screen](image)

3. Select the Reset Password link in the “Forgot Password” email. Or, if applicable, enter the code provided via SMS text message or voice call.

4. Enter the applicable security question answer. Then select the Reset Password button.

5. Enter the new password in both the New Password field and the Confirm Password field. Then select the Reset Password button.

![Figure 19: Password fields](image)
Unlocking a Locked Account

Users can initiate the self-service account unlock process by selecting the Unlock link on the IDM sign-in screen (as described in the below steps). Or, users can select the "Unlock Account" link in the "Account Unlock" email that is automatically sent to their email address upon their becoming locked.

NOTE: Users must remember their security question answer to complete this process.


![Figure 20: Self-service Unlock link](image)

2. Enter a **User ID** and select the applicable recovery method.

![Figure 21: Unlock Account screen](image)

3. Select the **Unlock Account** link in the “Account Unlock” email. Or, if applicable, enter the code provided via SMS text message or Voice Call.

4. Enter the applicable security question answer. Then select the **Unlock Account** button.

![Figure 22: Security question answer](image)
Recovering a Forgotten User ID

Users can initiate the self-service recover a forgotten User ID process by selecting the User ID link on the IDM sign-in screen.

1. Select the **User ID** link on IDM sign-in screen at [https://home.idm.cms.gov/](https://home.idm.cms.gov/)

![Figure 23: Self-service User ID link](image)

2. Enter the requested information and select the **Submit** button. Then refer to the system-generated email for the recovered User ID.

![Figure 24: Forgot User ID screen](image)
Changing an Expired Password
When users attempt to sign in to MACPro or to IDM, if their password has expired, a “Your password has expired” message will appear.

1. Enter the expired password in the **Old Password** field.
2. Enter the new password in both the **New Password** field and the **Repeat Password** field.
3. Select the **Change Password** button.

*Figure 25: Expired Password screen*
Managing User Account Profile Information

Users can view and manage the following account information via the My Profile tile in IDM.

- View a summary of the user profile.
- View and modify personal and business contact information.
- Change account password and security question answer
- View and manage MFA and recovery devices

Accessing & Viewing a User Profile

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile.

3. A summary of the user profile appears on the My Information screen.
Modifying Personal or Business Contact Information

1. Sign in to IDM at https://home.idm.cms.gov/

2. Select the My Profile tile

![Figure 28: My Profile tile]

3. Select the Personal Contact Information link or the Business Contact Information link, as applicable.

![Figure 29: Contact Information links]

4. Select the Edit button.

![Figure 30: Edit button for Contact information]

5. Update the modifiable fields as needed. Then select the Submit Changes button.

![Figure 31: Submit Changes button]
Changing a Security Question & Answer

Users can change their security question and answer via the My Profile tile in IDM. Note that the security question answer must contain at least four characters, and it cannot contain parts of the user's first name, last name, password, or security question.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile.

![Figure 32: My Profile tile](image)

3. Select the Change Security Question link.

![Figure 33: Change Security Question link](image)

4. Select a question from the Security Questions drop-down list and enter the answer. Then enter the password and select the Change Security Question button.

![Figure 34: Change Security Question screen](image)
Changing the User Account Password

Users can change their IDM user account password via the My Profile tab in IDM, per the below steps. If users have forgotten their password and thus are unable to sign in to MACPro or to IDM, refer to the Resetting a Forgotten Password topic for applicable instructions.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile.

![Figure 35: My Profile tile](image)

3. Select the Change Password link.

![Figure 36: Change Password link](image)

4. Enter the current and the new passwords in the applicable fields. Then select the Change Password button.

![Figure 37: Change Password screen](image)
Managing MFA & Recovery Devices

Multi-factor authentication (MFA) is an optional additional layer of account security that functions essentially as a "second" password at sign-in. Email is automatically set as the default MFA device when activated.

Additionally, email is set as the default Recovery device for IDM user accounts. A Recovery device enables the use of IDM self-service account-access features such as resetting a forgotten password, unlocking an account, and recovering a forgotten User ID.

Below are the MFA and Recovery devices available for use with IDM.

- Email Address
- Interactive Voice Response (IVR)
- Text Message (SMS)
- Google Authenticator
- OKTA Verify

IMPORTANT NOTES:

- Users are highly encouraged to have multiple MFA and/or Recovery methods enabled for their IDM account.

- MFA is not required for MACPro; however, all users are required to have an active Recovery device, which can be used for IDM self-service account-access features.

![Figure 38: Manage MFA and Recovery Devices screen](Image)
Adding a Text Message (SMS) MFA & Recovery Device
A text message (SMS) MFA and Recovery device delivers a one-time verification code via a text message that is sent directly to the phone number listed on the user's account.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile. Then select the Manage MFA and Recovery Devices link.
3. Select the Text Message (SMS) option in the Add another device drop-down list.
4. Enter the registered phone number. Then select the Verify MFA button.
5. Retrieve and enter the verification code.
6. Select the Confirm MFA button. A message will appear indicating the device was successfully added.

![Figure 39: Text Message (SMS) screen](image)

Adding an Interactive Voice Response (IVR) MFA & Recovery Device
An Interactive Voice Response (IVR) MFA and Recovery device delivers a one-time verification code via an automated voice message that is sent directly to the phone number listed on the user's account.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile. Then select the Manage MFA and Recovery Devices link.
3. Select the Interactive Voice Response (IVR) option in the Add another device drop-down list.
4. Enter the applicable phone number. Then select the Verify MFA button.
5. Retrieve and enter the verification code in the field provided.
6. Select the Confirm MFA button. A message will appear indicating the device was successfully added.

![Figure 40: Interactive Voice Response (IVR) screen](image)
Adding an Okta Verify MFA Device
The Okta Verify MFA device uses the Okta Verify mobile app to deliver a push notification to the user’s smartphone or tablet mobile device.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile. Then select the Manage MFA and Recovery Devices link.
3. Select the Okta Verify option in the Add another device drop-down list.
4. Follow the on-screen prompts for installing and setting up Okta Verify.

![Figure 41: OKTA Verify screen](image)

Adding a Google Authenticator MFA Device
The Google Authenticator MFA device can use the Google Authenticator mobile app to deliver a one-time verification code to the user’s smartphone or tablet mobile device. The Google Authenticator mobile app can receive MFA codes even in the absence of internet or mobile service connectivity.

1. Sign in to IDM at https://home.idm.cms.gov/
2. Select the My Profile tile. Then select the Manage MFA and Recovery Devices link.
3. Select the Google Authenticator option in the Add another device drop-down list.
4. Follow the on-screen prompts for installing and setting up Google Authenticator.

![Figure 42: Google Authenticator screen](image)
## Acronyms & Abbreviations

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHIP</td>
<td>Children’s Health Insurance Program</td>
</tr>
<tr>
<td>CMS</td>
<td>Centers for Medicare &amp; Medicaid Services</td>
</tr>
<tr>
<td>IDM</td>
<td>Identity Management System</td>
</tr>
<tr>
<td>IVR</td>
<td>Interactive Voice Response</td>
</tr>
<tr>
<td>LOA</td>
<td>Level of Access</td>
</tr>
<tr>
<td>MACPro</td>
<td>Medicaid &amp; CHIP Program System</td>
</tr>
<tr>
<td>MFA</td>
<td>Multi-factor Authentication</td>
</tr>
<tr>
<td>RD</td>
<td>Reference Document</td>
</tr>
<tr>
<td>RIDP</td>
<td>Remote Identity Proofing (also known as identity verification)</td>
</tr>
<tr>
<td>SMS</td>
<td>Short Message Service (also known as text messages)</td>
</tr>
</tbody>
</table>
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>A name, usually a function or title, given to a collection of access privileges or permissions within an application. A role defines what the user is allowed to do by virtue of having been assigned or granted that role. Each application defines the access privileges and permissions assigned to each role.</td>
</tr>
<tr>
<td>Role Attribute</td>
<td>A characteristic of a role that typically represents a functional limitation of the scope of a role's access privileges.</td>
</tr>
<tr>
<td>Security Question and Answer (SQA)</td>
<td>The security question is a question to which the user provides a unique answer. They both become part of the user’s account and are used to authenticate the user when they access IDM’s self-service functions.</td>
</tr>
<tr>
<td>Multi-factor Authentication (MFA)</td>
<td>MFA is an additional layer of security that functions as a &quot;second&quot; password. It is transmitted as a numeric code to the user’s email (by default) or phone and is good for one sign in only.</td>
</tr>
</tbody>
</table>
| Remote Identity Proofing (RIDP)               | Describes the process that is used to confirm a person’s identity. Most users will be required to complete RIDP as part of the process of being approved for a role in IDM. Users may have three opportunities to verify their identity. Verification occurs in the following order:  
  - Online Proofing - An identity verification procedure that uses Experian’s computer-based Identity Verification service.  
  - Phone Proofing - An identity proofing procedure that uses Experian’s telephone-based Identity Verification service. Phone proofing is available only if a user’s identity cannot be verified using online proofing.  
  - Manual Proofing - An identity proofing procedure that is performed by an the MACPro help desk. Manual proofing is an option only if the user is unable to first verify their identity through online proofing and phone proofing. |
| Recovery                                      | A process that allows a user to reset their own password or unlock their own account without the assistance of a help desk.                      |
| Recovery Device                               | An email, short message service (SMS), or interactive voice response (IVR) device such as a phone, that is used to authenticate a user during the recovery process. |
| MACPro User Role                              | MACPro-specific user roles that users will request and hold within MACPro. These roles allow users to perform various functions within MACPro. MACPro user roles are separate from the roles that users request within IDM. |
| IDM Role for MACPro                           | Roles that users request within IDM to obtain access to MACPro.                                                                            |
| IDM User ID                                   | All MACPro users are required to have an IDM User ID, which is used to access MACPro and other CMS system applications.                     |