

Durable Medical Equipment, Prosthetics, Orthotics and Supplies

DMEPOS Competitive Bidding Program

CMS Enterprise Portal

Registration Reference Guide

For DBidS and Connexion



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Introduction

This Registration Reference Guide explains how to request access to the Centers for Medicare and Medicaid Services' (CMS') Durable Medical Equipment, Prosthetics, Orthotics, and Supplies (DMEPOS) Bidding System, DBidS, and the DMEPOS Competitive Bidding Program's secure portal, Connexion, in the CMS Enterprise Portal. Before requesting access to these applications, you must first register in the CMS Enterprise Portal for a user ID and password. Please see the [CMS Enterprise Portal User Manual](#) for registration instructions, as well as the [Registration Checklist](#) and [Troubleshooting Tips](#).

The guide provides instructions on:

- A. Requesting Access to DBidS
- B. Requesting Access to Connexion
- C. Adding Multiple Provider Transaction Access Numbers (PTANs) to Your Access
- D. Approving and Rejecting User Requests
- E. Removing a Role and/or PTAN from Your Access
- F. Updating Your Organization's Information
- G. Updating Your Contact Information

DBidS and Connexion Access

When registration opens for Round 2021, you will need to:

1. Log into the CMS Enterprise Portal with your user ID and password
2. Request access to the DBidS and Connexion applications
3. Select the same role (authorized official (AO), backup authorized official (BAO), or end user (EU)) for both DBidS and Connexion
4. Enter your organization's information and PTAN identically for both DBidS and Connexion. The company legal business name and PTAN must be valid and active in the Provider Enrollment, Chain, and Ownership System (PECOS).

The legal business name (LBN) on the bidding entity's bid surety bond must be the same as the LBN associated with the PTAN you use to register for DBidS. This LBN will auto-populate in the Business Organization Information section of Form A in DBidS.

Role Definitions

Authorized Official (AO)

To register as an AO in the CMS Enterprise Portal, you must be listed as an AO on the CMS-855S enrollment application reflected in PECOS for your organization. In addition, your organization must have a unique and active PTAN assigned by the National Supplier Clearinghouse (NSC).

The AO is the person who can register an organization in the CMS Enterprise Portal and update the organization's access information in the portal.

- For DMEPOS Competitive Bidding Program registration purposes, only one AO can register for an organization. Each organization is identified by the PTAN entered by the AO. The AO is authorized by CMS to approve or reject BAOs' and EUs' requests to access and enter data in DBidS, upload required documents, and view and complete specific contract documents and forms in Connexion.
- The instructions for approving or rejecting requests for access are found in **Section D: Approving/Rejecting User Requests** (page 37). The AO is a required role and the AO's access must remain active to prevent all other users (i.e., BAOs and EUs) for the organization from losing access to DBidS and/or Connexion.
- The AO is accountable and responsible for the actions (e.g., submitting a bid) of those he or she approves and adds to the organization.
- The AO must also update the organization's enrollment file in PECOS if a registered AO or BAO leaves the organization. The AO (and/or the BAO) must approve Form A and certify Form B(s) in DBidS and approve specific contract documents in Connexion.

Backup Authorized Official (BAO)

To register as a BAO, you must be listed as an AO on the CMS-855S enrollment application reflected in PECOS for your organization. If only one AO is listed on the CMS-855S application, we strongly encourage you to add one or more eligible persons, so they can serve as BAOs to avoid disruption in the bidding and contracting processes should the AO leave the organization or become unavailable. For DMEPOS Competitive Bidding Program registration purposes, one or more BAOs can be in an organization. A BAO may perform many of the same functions as an AO for an organization.

- A BAO has the authority to approve or reject an EU's request to be included on the company's registration access to enter and view bid data in DBidS, upload documents in Connexion, and view and complete specific contract documents in Connexion.
- A BAO can approve Form A and certify Form B(s) in DBidS, upload documents, and view and approve contract documents in Connexion.
- A BAO must update the organization's registration access if the registered AO leaves the company.

- A BAO may associate to more than one organization (bidding entity) as long as each organization has the same AO and when the AO has registered more than one PTAN in the CMS Enterprise Portal (see network and common ownership and common control exception in **Section C: Adding Multiple PTANs to Your Access** (page 26)). Each organization is identified by the PTAN entered by the AO.

End User (EU)

An EU has limited capabilities. An EU does **not** have to be identified on the CMS-855S enrollment application reflected in PECOS. An EU is someone who has the ability to enter bid information in DBidS, upload documents, and view specific contract documents in Connexion. An EU may associate to more than one organization (bidding entity) as long as each organization has the same AO, and when the AO has registered more than one PTAN in the CMS Enterprise Portal. Each organization is identified by a PTAN entered by the AO. An EU cannot approve Form A or certify Form B(s) in DBidS or approve contract documents in Connexion. These functions must be done by the AO or BAO. Multiple EUs may be registered for an organization, but only one EU at a time may enter data in DBidS on Form A or Form B. In addition, EUs will have the capability to submit a bidder inquiry. Please see the table below for more information on the user roles and their functions:

User Role Functionality Table

DBidS	AO	BAO	EU
Complete Business Organization Information Section in Form A	Y	Y	N
Enter Location Specific Information in Form A	Y	Y	Y
Approve Form A	Y	Y	N
Enter Information in Form B	Y	Y	Y
Certify Form B	Y	Y	N
Connexion	AO	BAO	EU
Upload Documents (e.g., bidding documents and responses to notices)	Y	Y	Y
View Preliminary Bid Evaluation (PBE) Notice/Table	Y	Y	Y
View Covered Document Review Date (CDRD) Notice/Table	Y	Y	Y
View Bona Fide Bid (BFB) Notice/Table	Y	Y	Y
View Disqualification Notice/Table	Y	Y	N
Submit Bidder Inquiry	Y	Y	Y
View Determination Notice	Y	Y	Y*
View Contract offer	Y	Y	N
Accept or Decline Contract Offer(s)	Y	Y	N
View Fully Executed Contract	Y	Y	Y

**Only if the EU plays a role in the bidder inquiry submission (i.e., submits the inquiry and/or uploads rationale/supporting documentation in Connexion).*

Definitions

Common Control – Suppliers are commonly controlled if one or more of a supplier’s owners are also an officer, director, or partner in another supplier.

Common Ownership – Two or more suppliers are commonly owned if one or more of them have an ownership interest totaling at least 5 percent in the other(s). The term “ownership interest” is defined as “the possession of equity in the capital, stock, or profits of another supplier.”

Connexion – The secure portal for the DMEPOS Competitive Bidding Program for suppliers to upload bidding documents, view and respond to contract offers, and to complete and submit forms required to update contract information.

DMEPOS Bidding System, DBidS – The online bid submission system for the DMEPOS Competitive Bidding Program.

Multi-Factor Authentication (MFA) – An added security feature where a login requires multiple inputs. If a user adds MFA to his or her profile, the user will be presented with a password page that requests both the password and the MFA security code, which will be sent to the device of the user’s choosing.

Organization – A bidding entity such as an individual or a company.

Profile – CMS Enterprise Portal account information that contains the user’s name, date of birth, home address, phone number, email address, city, state, and ZIP code.

Access – Information provided by the supplier about the organization.

Add role – Associate, join, or connect a user (BAO or EU) or PTAN to an organization and its CMS Enterprise Portal access.

Remote Identity Proofing (RIDP) – Part of the registration process, which is completed only once, where the user must provide personal information such as name, date of birth, address, etc. exactly as recorded on either the user’s driver’s license or any government ID. As part of this process, the system will require answers to questions related to the user’s personal and financial information.

Remove role – Disassociate, remove, or detach a user’s access or PTAN from an organization’s CMS Enterprise Portal access.

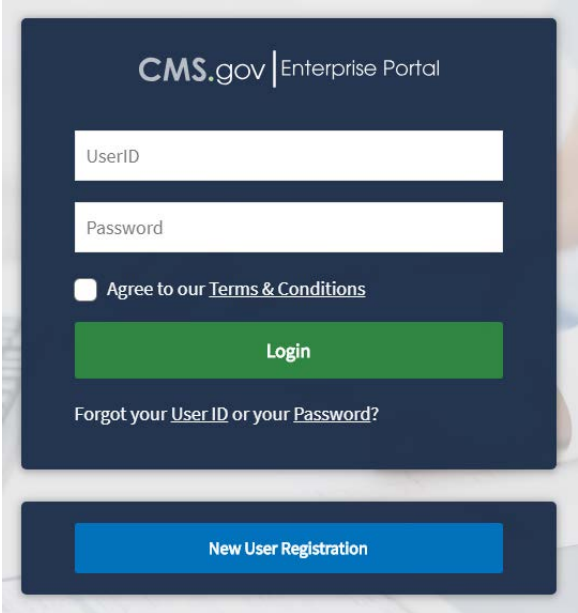
A: Requesting Access to DBidS

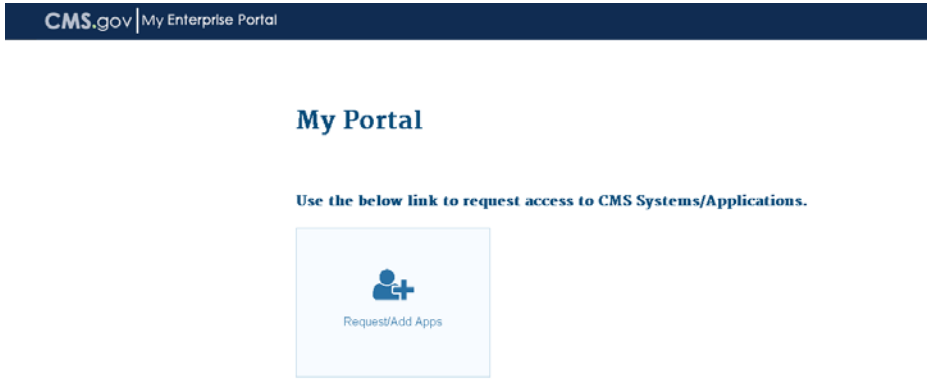
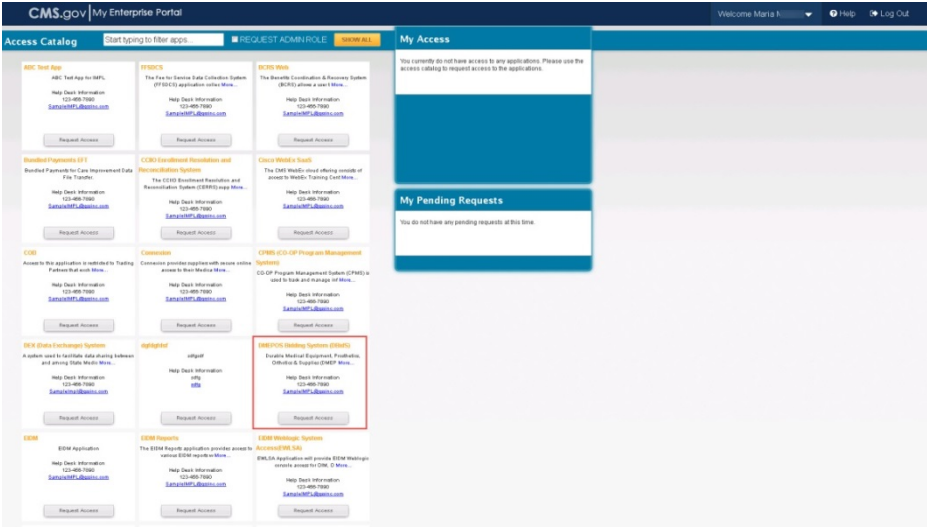
DBidS is the online system used to submit bids electronically for the DMEPOS Competitive Bidding Program.

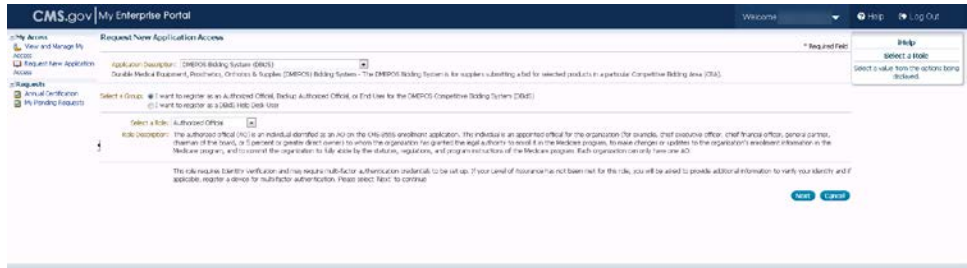

Follow the steps below to request access to DBidS. Once access is established, you will be able to enter DBidS when the bid window opens.


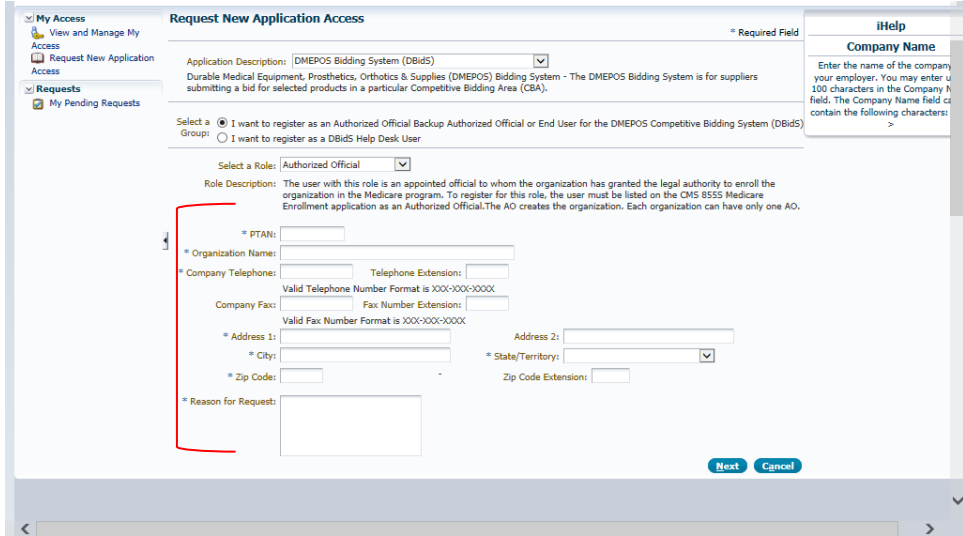
Important: AOs must request access to DBidS before BAOs and EUs can request access to DBidS.

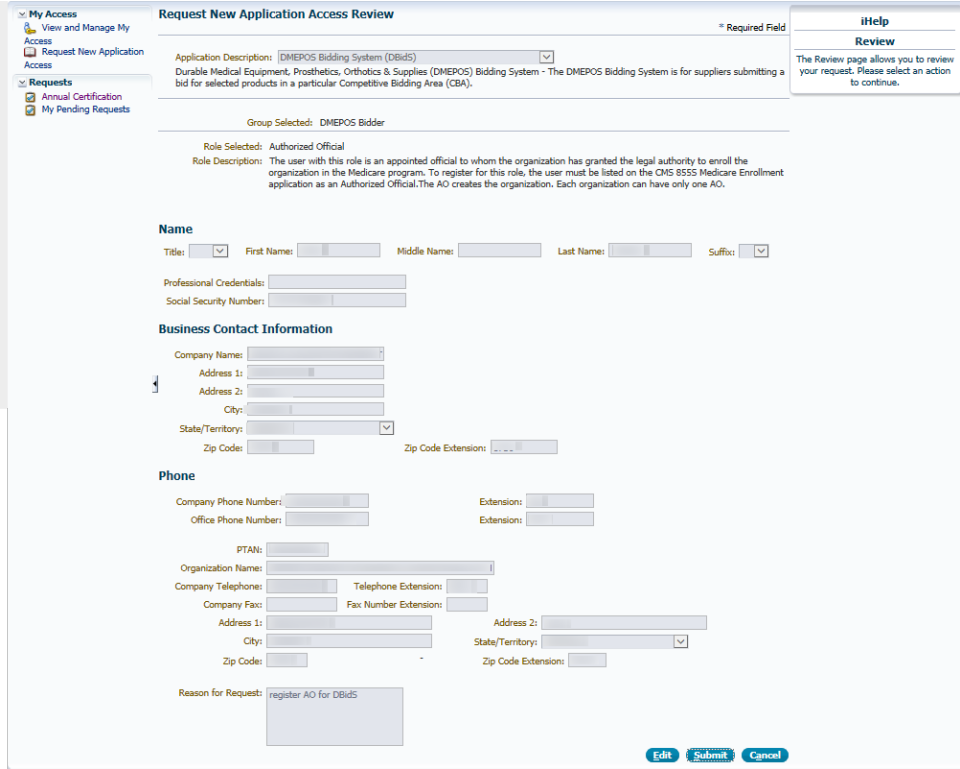
Step	Action	Screen Displayed
1	Visit the Round 2021 home page on the CBIC website. Go to Registration . Click Register Now . OR Go to Portals and then click CMS Enterprise Portal . Click Register Now .	

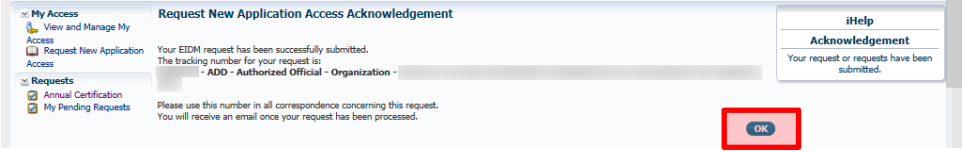
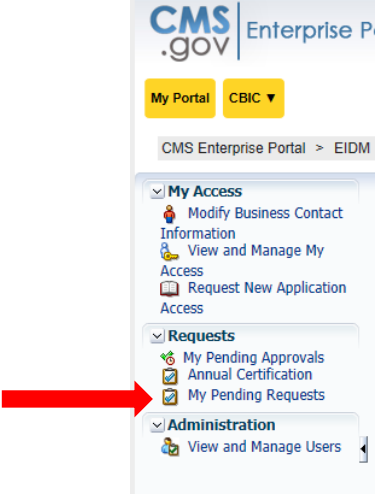
Step	Action	Screen Displayed
2	<p>The CMS Enterprise Portal page will appear.</p> <p>Enter your user ID.</p> <p>Enter your password.</p> <p>Click Agree to our Terms and Conditions.</p> <p>Click Login.</p> <p>If your registration is still processing, you will receive an error message and be unable to log in. Please wait five minutes before attempting to log in again.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	

Step	Action	Screen Displayed
3	<p>The My Portal page will appear.</p> <p>Click Request/Add Apps.</p> <p>You may also select the down arrow in the upper right hand corner by your user name, and select My Access from the drop down menu.</p>	
4	<p>The Access Catalog section will display.</p> <p>Note: You cannot request access to DBidS and Connexion at the same time. However, you will complete the same steps to request access to each application.</p> <p>Scroll down or use the Search section to locate the DMEPOS Bidding System (DBidS) application.</p> <p>Select Request Access on the DMEPOS Bidding System (DBidS) application.</p> <p>Note: If you have already requested access to DBidS but need to make a change, the application will be displayed in the My Access section.</p>	

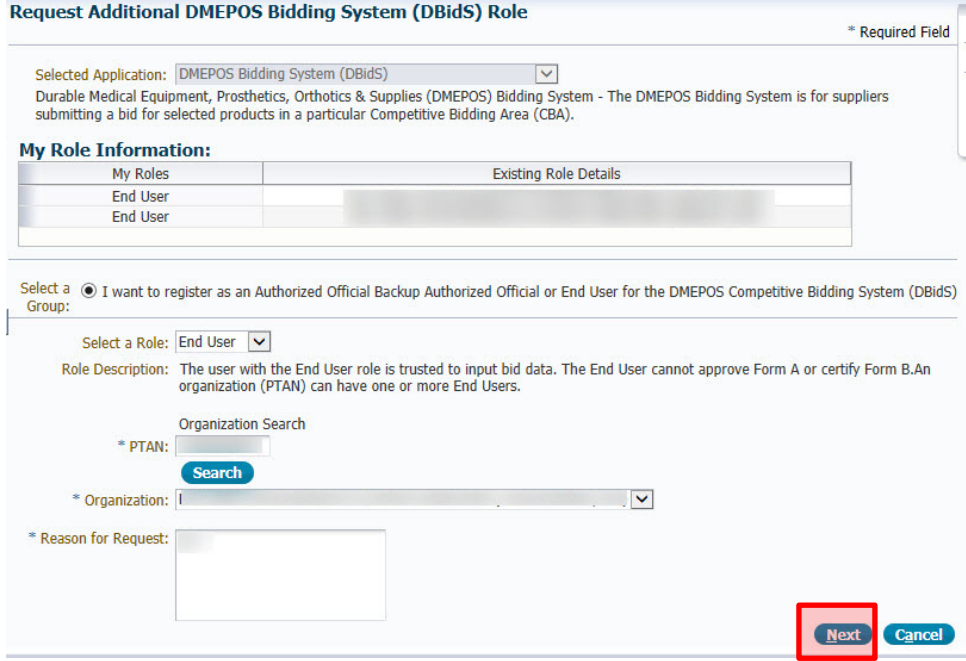

Step	Action	Screen Displayed
5	<p>The Request New Application Access page will appear.</p> <p>The Application Description will automatically populate.</p> <p>Select your role (AO, BAO, or EU) from the drop down menu. You must select the same role for both Connexion and DBidS.</p> <p>Once you select your role (AO, BAO, or EU) from the drop down menu, the Request New Application Access page will refresh with additional information about the role selected. Click Next.</p> <p>Note: As a new user, you will be prompted to answer a set of personal identification questions (Remote Identity Proofing (RIDP)). This prompt will only happen one time. If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p>	
6	<p>If you would like to add a layer of protection to your user ID and password, you may choose to Add MFA to your account.</p> <p>If you would not like to add a layer of protection to your user ID and password, you may select Skip MFA to continue with the role request.</p> <p>Select Cancel to end the role request.</p>	

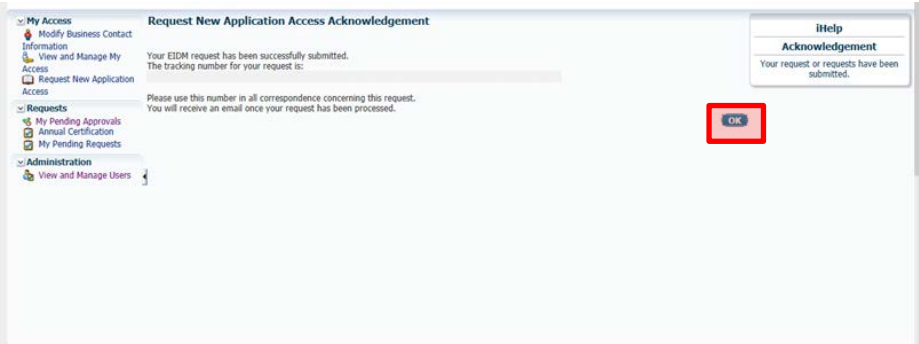
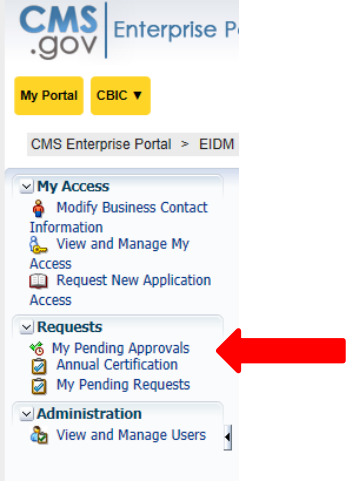
Step	Action	Screen Displayed
7	Enter your information as well as the organization's contact information then click Next .	
8	<p>You will have different options depending upon your role:</p> <p>AO – Complete steps 8 - 10.</p> <p>BAOs and EUs – Go to page 14 and complete steps 9a-11a.</p> <p>Enter the PTAN and organization's information in the Organization Information fields (e.g., a unique PTAN and the company name and address). The PTAN must be active and match data in PECOS.</p> <div data-bbox="243 1073 913 1203" style="border: 1px solid black; background-color: yellow; padding: 5px; margin: 10px 0;"> <p>Use the same PTAN and enter the same company information when requesting access to both the DBidS and Connexion applications.</p> </div> <p>Enter Reason for Request such as 'Enter bid data,' or 'Approve bid' and click Next.</p> <p>Note: The PTAN can be any location that you intend to include on your bid to furnish items in the CBA(s).</p>	

Step	Action	Screen Displayed
	<p>When selecting your PTAN for registration purposes, it's important to note:</p> <p>The legal business name (LBN) on your company's bid surety bond(s) must be the same as the LBN associated with the PTAN you use to request access for DBidS and Connexion. This LBN will auto-populate in the Business Organization Information section of Form A in DBidS.</p>	
9	<p>The Request New Application Access Review page will display. If the information shown is correct, click Submit. If it is incorrect, click Edit and make the appropriate revisions.</p> <p>You will verify/enter your first, middle, last name, SSN and DOB in the fields located under the Name section. The SSN needs to match PECOS, as PECOS is the system that houses a supplier's information. If you entered SSN and DOB when creating your profile, they will display here. Otherwise, the fields will be blank and you will need to enter any missing data here.</p>	

Step	Action	Screen Displayed
10	<p>The Request New Application Access Acknowledgement page will appear with your request tracking number.</p> <p>You will receive a verification email.</p> <p>Click OK to return to the View And Manage My Access page. This will show what requests have been approved and what requests are pending. If you have registered for DBidS, but not for Connexion, then you must go back to the Access Catalog page and select Request Access for Connexion.</p> <p>Click Log Out in the upper right hand side of the page, and wait five minutes before logging into the CMS Enterprise Portal and making any other changes to your account or application access.</p> <p>Your role will take up to five minutes to display on the View And Manage My Access page.</p> <p>Note: To cancel your request for access, select My Pending Requests on the left hand navigation pane, then select Cancel to the far right of the request.</p>	 

If the BAO or EU wishes to be associated with this PTAN, he or she should complete steps 1-8 above. The BAO or EU must then complete steps 9a-11a below. The AO approves the BAO's or EU's request to be associated with this PTAN.

Step	Action	Screen Displayed
9a	<p>The BAO or EU should enter the PTAN added by the AO, click Search, and using the Organization drop down box, select your company.</p> <p>Enter Reason for Request such as 'Associate with a PTAN' or 'Enter bid data' and click Next.</p>	
10a	<p>The Request New Application Access Review page will display with the entered information. If the information is correct, click Submit.</p>	

Step	Action	Screen Displayed
11a	<p>The Request New Application Access Acknowledgement page will appear with your request tracking number.</p> <p>You will receive a verification email.</p> <p>Click OK to return to the View And Manage My Access page.</p> <p>If you have not registered for DBidS, you must go to the Access Catalog Page, and select Request Access for the DBidS application.</p> <p>If you are a BAO or an EU, your role will not display on the View And Manage My Access page until the AO or BAO has approved your role request.</p> <p>Click Log Out in the upper right hand side of the page, and wait until the AO or BAO has approved your role request. You will receive an email when approval is granted.</p> <p>Note: To cancel your request for access, select the My Pending Requests on the left hand navigation pane, then select Cancel to the far right of the request.</p>	 

You are now ready to log into DBidS when the bid window opens.

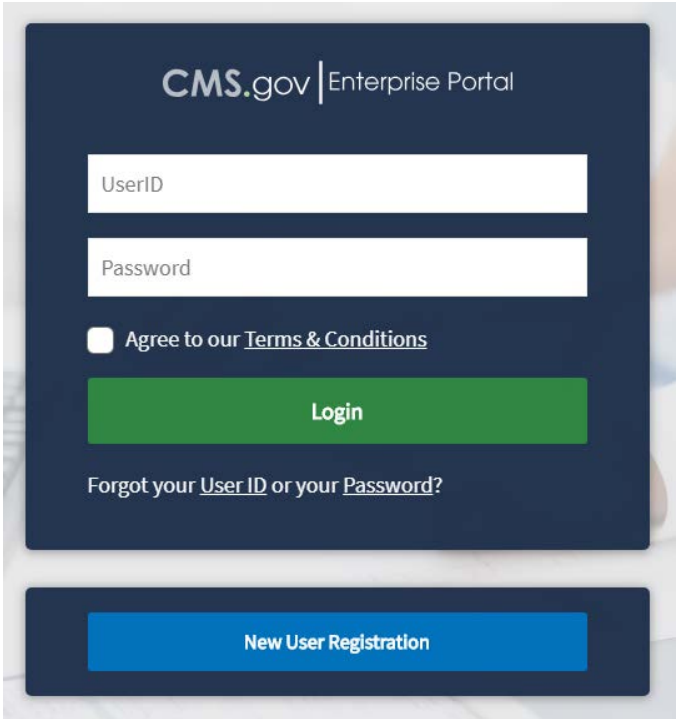
Important Reminder: All users can and must register and use their own individual user ID and password. Do not disclose or lend your user ID and/or password to anyone else. Your user ID and password are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions. Sharing of accounts may lead to termination of system access privileges and/or adverse action up to and including legal prosecution.

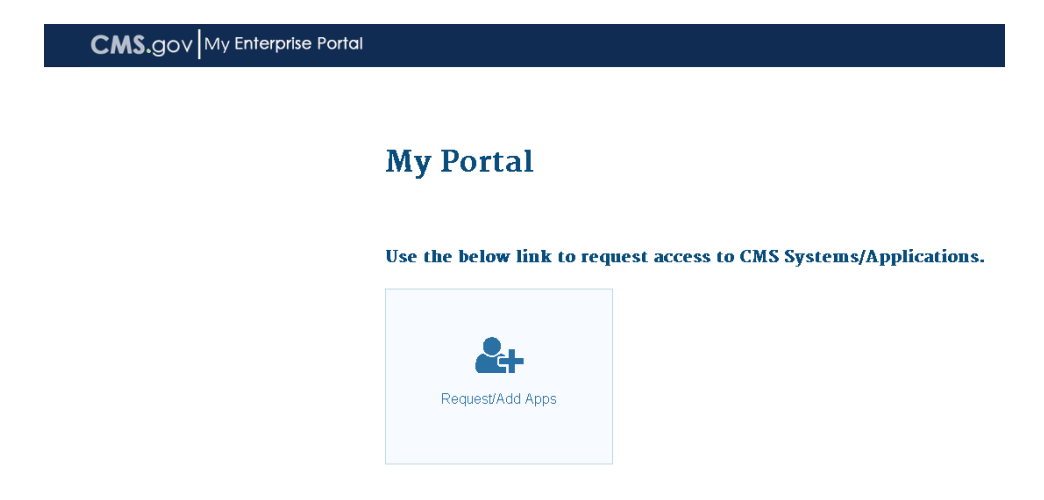
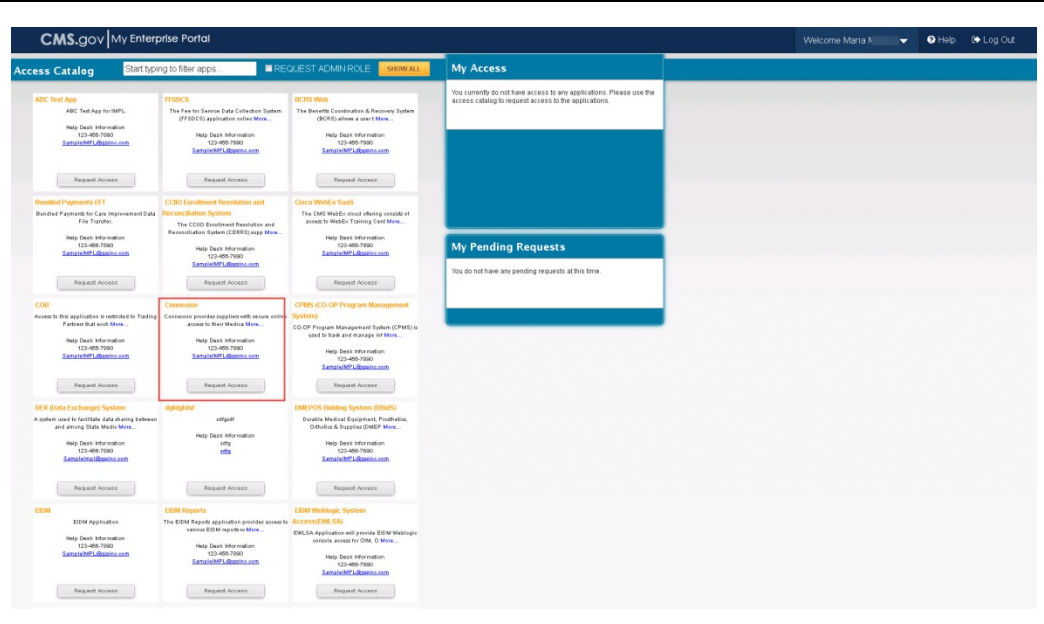
B: Requesting Access to Connexion


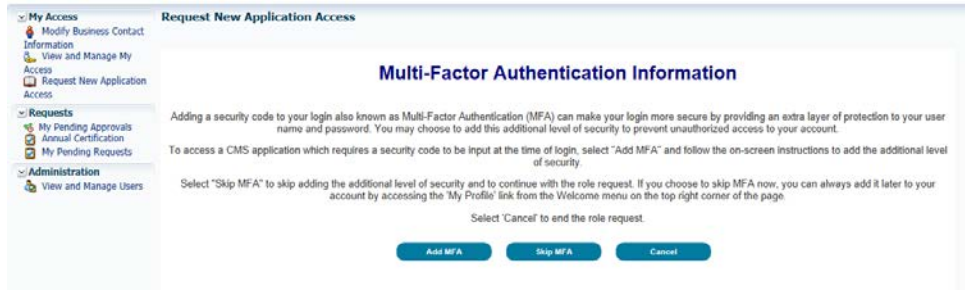
Connexion is the secure portal for the DMEPOS Competitive Bidding Program for bidders to perform functions such as uploading bidding documents, viewing and responding to bidding correspondence, and completing and submitting contract information. You may register in the CMS Enterprise Portal to request access to Connexion at any time once registration opens following the steps outlined below. Unlike DBidS, however, registration for Connexion does not close.

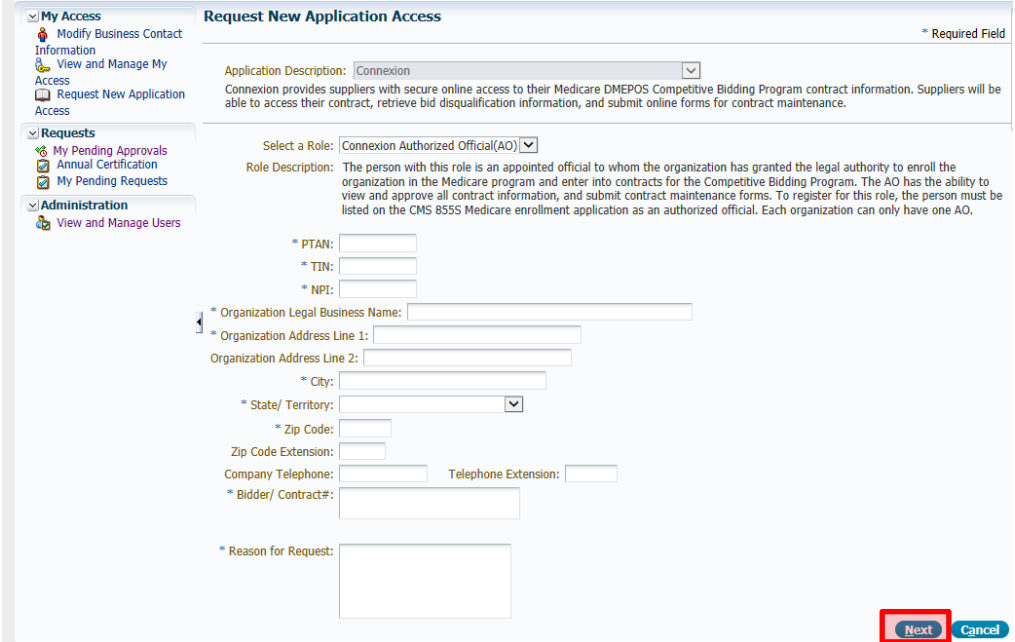
Note: You must use the **same** PTAN and select the **same** role you used or plan to use to access DBidS.

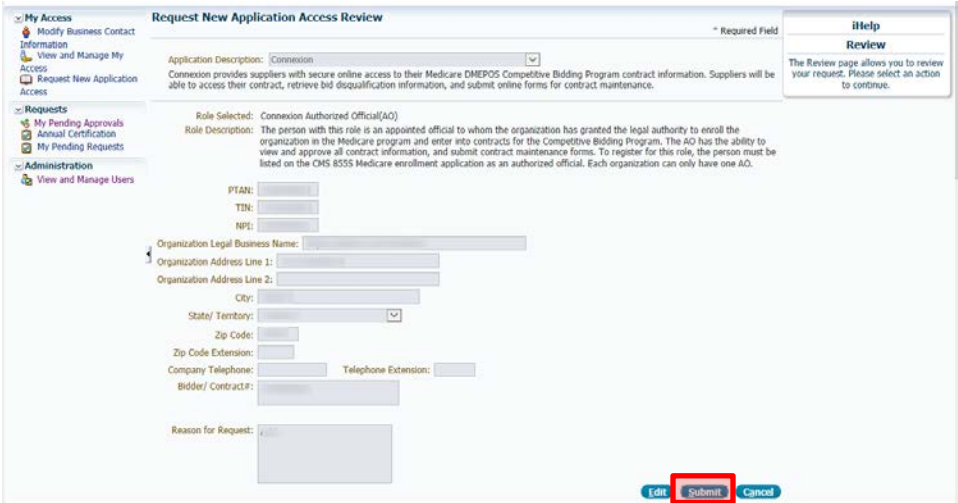
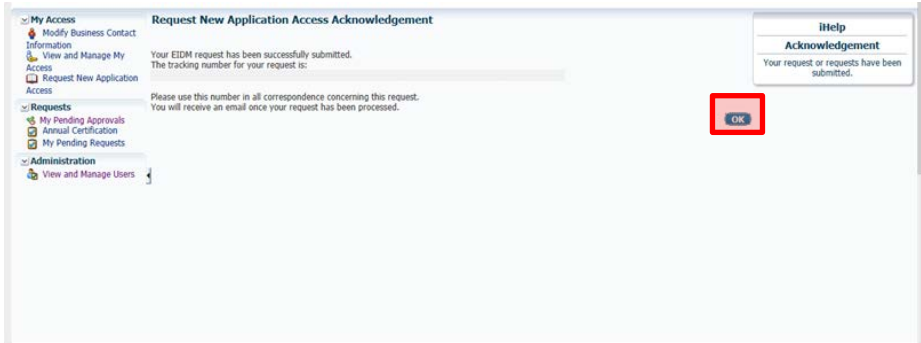
Step	Action	Screen Displayed
1	Visit the Round 2021 home page on the CBIC website. Go to Registration . Click Register Now . OR Go to Portals and then click CMS Enterprise Portal . Click Register Now .	


Step	Action	Screen Displayed
2	<p>Enter your user ID and password and select Login.</p> <p>If your registration is still processing, you will receive an error message and be unable to log in. Please wait five minutes before attempting to log in again.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	

Step	Action	Screen Displayed
3	<p>The My Portal page will appear.</p> <p>Click Request/Add Apps.</p> <p>You may also select the down arrow next to your user name in the upper right hand corner, and select My Access from the drop down menu.</p>	
4	<p>The Access Catalog section will display.</p> <p>Scroll down or use the Search section to locate the Connexion application. You cannot request access to Connexion and DBidS at the same time.</p> <p>Select Request Access on the Connexion application.</p> <p>Note: If you already have access to Connexion and are making changes to your profile, the application will be displayed in the My Access section.</p>	

Step	Action	Screen Displayed
5	<p>The Request New Application Access page will appear.</p> <p>The Application Description will automatically populate.</p> <p>Select your role (AO, BAO, or EU) from the drop down menu. You must select the same role for both Connexion and DBidS.</p> <p>Once you select your role (AO, BAO, or EU) from the drop down menu, the Request New Application Access page will refresh with additional information about the role selected.</p> <p>Click Next.</p> <p>Note: As a new user, you will be prompted to answer a set of personal identification questions (Remote Identity Proofing (RIDP)). This prompt will only happen one time. If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p>	
6	<p>If you would like to add a layer of protection to your user ID and password, you may choose to Add MFA to your account.</p> <p>If you would not like to add a layer of protection to your user ID and password, select Skip MFA to continue with the role request.</p> <p>Select Cancel to end the role request.</p>	

Step	Action	Screen Displayed
7	<p>AO – Complete steps 7-9.</p> <p>BAOs and EUs – Go to page 23 and complete steps 10-13.</p> <p>Enter the PTAN, TIN, NPI, and the organization's information in the Organization Information fields (e.g., a unique PTAN and the company name and address). The PTAN, TIN and NPI must match information on the CMS-855S application and reflected in PECOS.</p> <p>Enter the Reason for Request such as 'Upload required documents for bidding' and click Next.</p> <div data-bbox="241 771 913 901" style="border: 1px solid black; background-color: yellow; padding: 5px; margin: 10px 0;"> <p>Use the same PTAN and enter the same company information when requesting access to both the DBidS and Connexion applications.</p> </div> <p>When selecting your PTAN for registration purposes, it's important to note:</p> <p>The legal business name (LBN) on your company's bid surety bond(s) must be the same as the LBN associated with the PTAN you use to request access for DBidS and Connexion. This LBN will auto-populate in the Business Organization Information section of Form A in DBidS.</p>	

Step	Action	Screen Displayed
8	<p>The Request New Application Access Review page will display. If the information shown is correct, click Submit.</p>	
9	<p>The Request New Application Access Acknowledgement page will appear with your request tracking number.</p> <p>You will receive an email confirmation the submission, and another confirming when it has been completed.</p> <p>Click OK to return to the View And Manage My Access page. This will show what requests have been approved and what requests are pending. If you have registered for Connexion, but not for DBidS, then you must go back to the Access Catalog page, and select Request Access for DBidS.</p> <p>Your role will take up to five minutes to display on the View And Manage My Access page.</p>	

Step	Action	Screen Displayed
	<p>Click Log Out in the upper right hand side of the page, and wait five minutes before logging into the CMS Enterprise Portal and making any other changes to your account or accesses.</p> <p>Note: To cancel your request for access, select My Pending Requests on the left hand navigation pane, then select Cancel to the far right of the request.</p>	 <p>The screenshot shows the CMS.gov user interface. At the top, there is a dark blue header with the text 'CMS.gov'. Below the header, there are two main sections: 'My Access' and 'Requests'. The 'My Access' section contains two items: 'View and Manage My Access' with a key icon and 'Request New Application Access' with a document icon. The 'Requests' section contains two items: 'Annual Certification' with a checkmark icon and 'My Pending Requests' with a checkmark icon. A red arrow points to the 'My Pending Requests' item.</p>

If the BAO or EU wishes to be associated with this PTAN, he or she should complete steps 1-9 above. The BAO or EU must then complete steps 10-13 below. The AO must approve the BAO's or EU's request to be associated with this PTAN. The BAO can also approve the EU's request.

10

The BAO or EU should enter the PTAN added by the AO, click **Search**, and using the **Organization** drop down box, select your company.

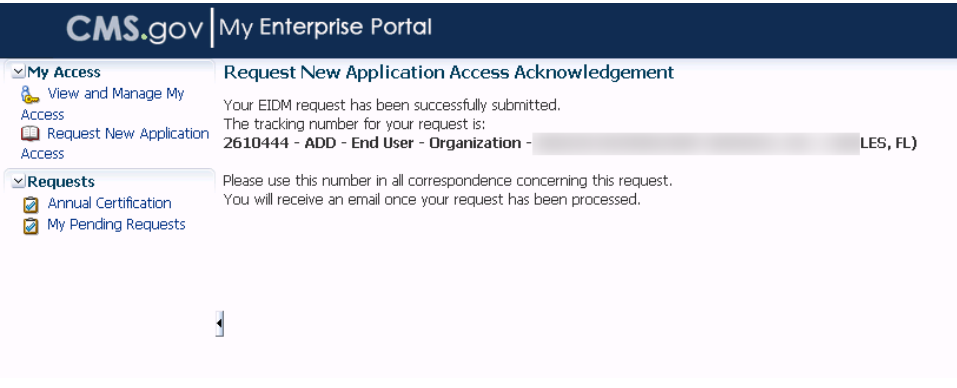
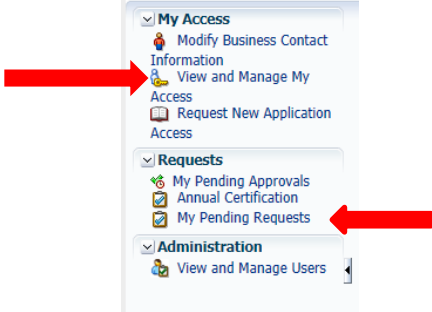
Enter **Reason for Request** such as 'Associate with a PTAN' or 'Upload bidding documents' and click **Next**.

The screenshot shows the 'Request New Application Access' page on the CMS.gov My Enterprise Portal. The page title is 'Request New Application Access'. The application description is 'Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Bidding System - The DMEPOS Bidding System is for suppliers submitting a bid for selected products in a particular Competitive Bidding Area (CBA)'. The user has selected the role 'End User'. The role description states: 'The user with the End User role is trusted to input bid data. The End User cannot approve Form A or certify Form B. An organization (PTAN) can have one or more End Users.' The 'Organization Search' section includes a search box and a dropdown menu for the state, currently set to 'ARLES, FL'. The 'Reason for Request' dropdown menu is open, showing the option 'Add EU after cancel without submit' selected. A red box highlights the search and organization selection area.

11

The **Request New Application Access Review** page will display. If the information shown is correct, click **Submit**.

The screenshot shows the 'Request New Application Access Review' page on the CMS.gov My Enterprise Portal. The page title is 'Request New Application Access Review'. The application description is 'Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Bidding System - The DMEPOS Bidding System is for suppliers submitting a bid for selected products in a particular Competitive Bidding Area (CBA)'. The user has selected the role 'End User'. The role description states: 'The user with the end user role is trusted to input bid data. The end user cannot approve form A or certify form B. An organization (PTAN) can have one or more End Users.' The 'Name' section includes fields for Title, First Name, Middle Name, Last Name, and Suffix. The 'Professional Credential' and 'Social Security Number' fields are also present. The 'Business Contact Information' section includes fields for Company Name, Address 1, Address 2, City, State/Territory, Zip Code, and Zip Code Extension. The 'Phone' section includes fields for Company Phone Number, Office Phone Number, and Extensions. The 'Organization Search' section includes a search box and a dropdown menu for the state, currently set to 'FL, FL'. The 'Reason for Request' dropdown menu is open, showing the option 'Add EU' selected.

<p>12</p>	<p>The Request New Application Access Acknowledgement page will appear with your request tracking number.</p> <p>You will receive a verification email.</p> <p>Click OK to return to the View and Manage My Access page.</p>	
<p>13</p>	<p>Your role will not display on the View And Manage My Access page until the AO or BAO has approved your role request.</p> <p>Click Log Out in the upper right hand side of the page, and wait until the AO or BAO has approved your role request. You will receive an email when approval is granted.</p> <p>Note: To cancel your request for access, select the My Pending Requests on the left hand navigation pane, then select Cancel to the far right of the request.</p>	

You are now ready to log into Connexion.

Important Reminder: All users can and must register and use their own individual user ID and password. Do not disclose or lend your user ID and/or password to anyone else. Your user ID and password are for your use only and serve as your electronic signature. This means that you will be held responsible for the consequences of unauthorized or illegal transactions. Sharing of accounts may lead to termination of system access privileges and/or adverse action up to and including legal prosecution.

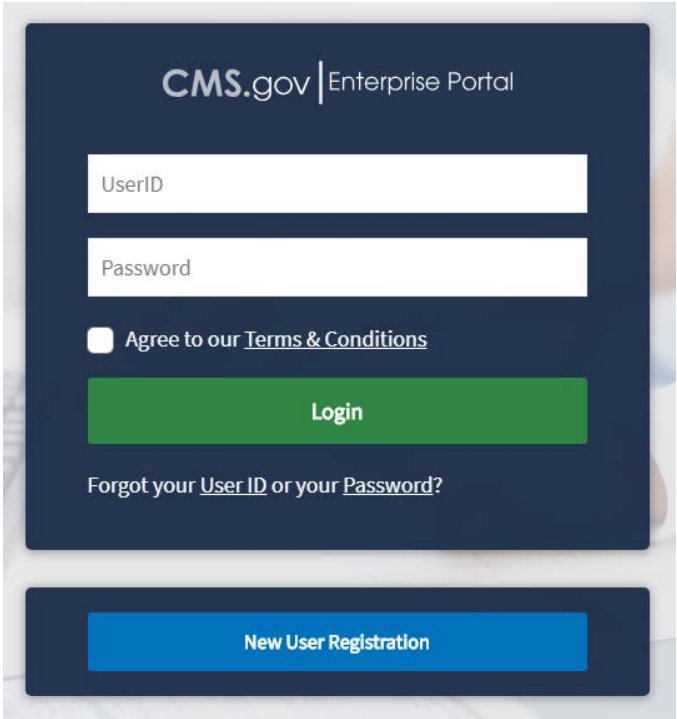
C: Adding Multiple PTANs to Your Access

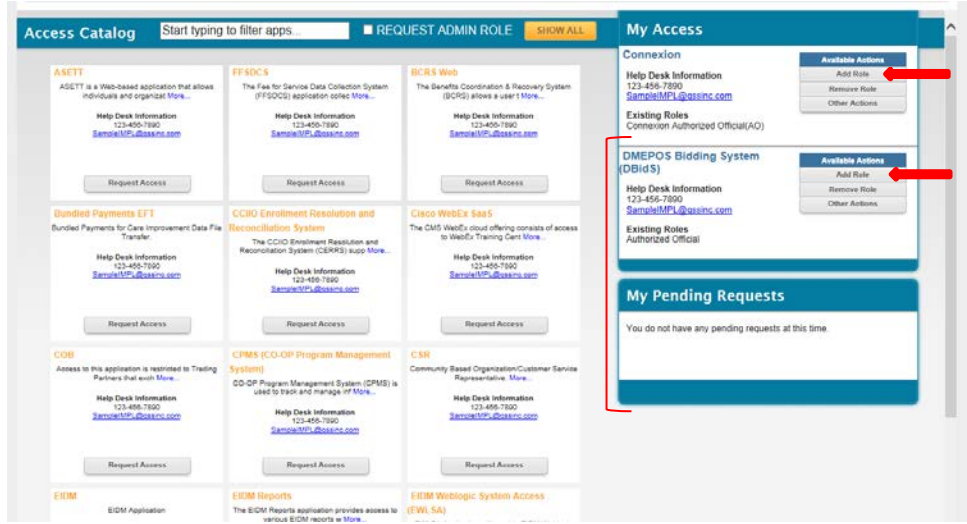
In most situations, you should register in the CMS Enterprise Portal with only **one** PTAN, regardless of your business organization type (supplier with single location, supplier with multiple locations, or network). However, for certain situations your role may be associated with multiple PTANs in the CMS Enterprise Portal. It's important to note, however, that you must use the same PTAN to register for both DBidS and Connexion.

Important: You can have only one role – AO, BAO, or EU – in the CMS Enterprise Portal for DBidS and Connexion. You must also select the **same** role and PTAN for both DBidS and Connexion.

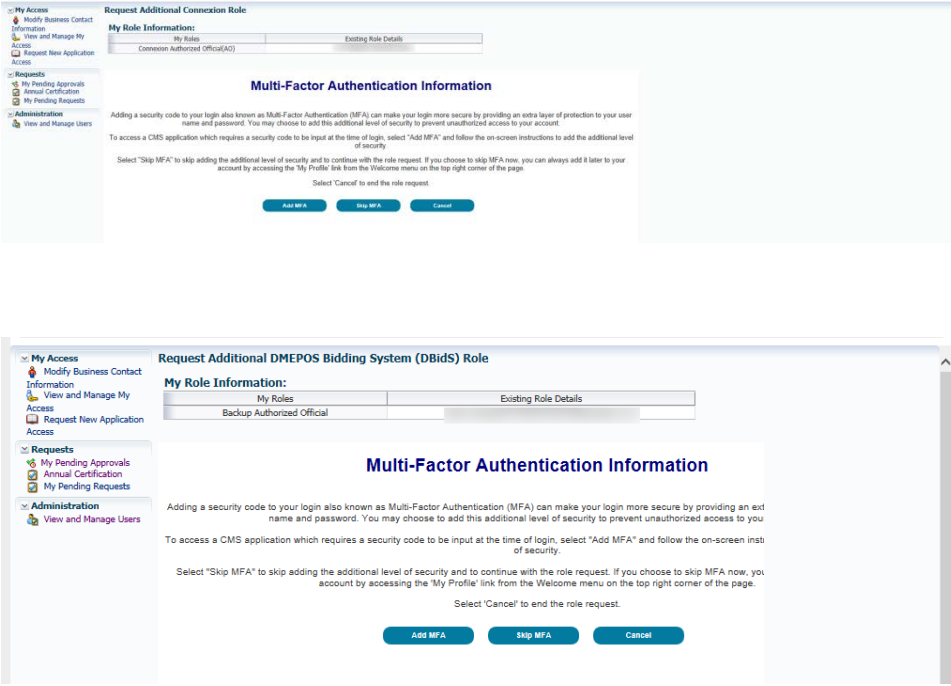
For DBidS:

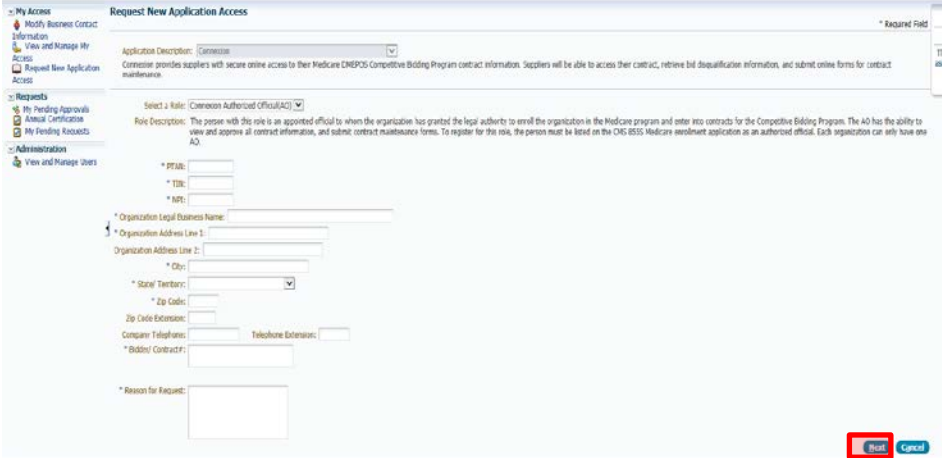
1. Primary members of a network only register **one** time. If the primary network member wants to submit an individual bid(s) for a competition that is separate from the network's bid(s), the primary member should still register **one** time. Then the primary network member should modify his or her access by adding a role to enter another PTAN (see step 6 below-Add Role): one PTAN for the network bid(s) and another PTAN for the individual bid(s). However, members of a network (who are not the primary network member) who are submitting a bid(s) for a competition separate from the network bid(s) will need to register to submit their separate bid(s).
2. Commonly owned and/or commonly controlled suppliers are prohibited from competing against themselves when bidding in the DMEPOS Competitive Bidding Program. Therefore, bidders that are commonly owned and/or commonly controlled must bid together by submitting one bid when bidding in the same competition. If bidders that are commonly owned and/or commonly controlled submit a separate bid(s) for the same competition(s), the bid(s) will be disqualified and none of these bidders will be awarded a contract for that competition(s). Commonly owned and/or commonly controlled suppliers may submit separate bids if they are bidding on different product categories in the same CBA, the same product category in different CBAs, or different product categories in different CBAs. In these situations, bidders have the option to register with more than one PTAN and submit separate bids.

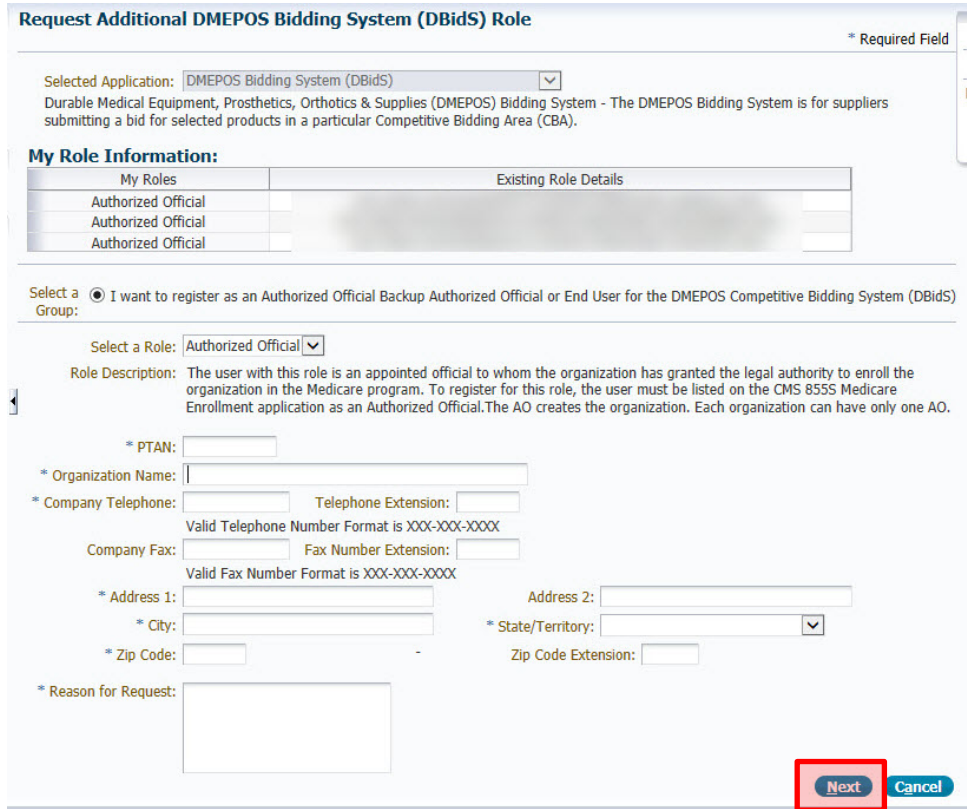
Step	Action	Screen Displayed
1	<p>Visit the Round 2021 home page on the CBIC website.</p> <p>Go to Registration. Click Register Now. OR</p> <p>Go to Portals and then click CMS Enterprise Portal.</p> <p>Click Register Now.</p>	
2	<p>Enter your user ID and password and select Login.</p> <p>Note: If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	


Step	Action	Screen Displayed
3	<p>The Access Catalog, My Access, and My Pending Requests panels will appear.</p> <p>In the My Access panel, your current roles for both Connexion and DBidS applications will appear.</p> <p>Select Add Role for the specific application – Connexion or DBidS.</p>	 <p>The screenshot displays the 'Access Catalog' interface. At the top, there is a search bar and a 'REQUEST ADMIN ROLE' button. Below this, a grid of application cards is shown, each with a title, description, help desk information, and a 'Request Access' button. The 'My Access' panel on the right side of the screen shows the user's current roles for two applications: 'Connexion' and 'DMEPOS Bidding System (DBidS)'. For each application, there is an 'Available Actions' section with buttons for 'Add Role', 'Remove Role', and 'Other Actions'. Red arrows point to the 'Add Role' buttons for both applications. Below the 'My Access' panel, there is a 'My Pending Requests' section which currently shows 'You do not have any pending requests at this time'.</p>

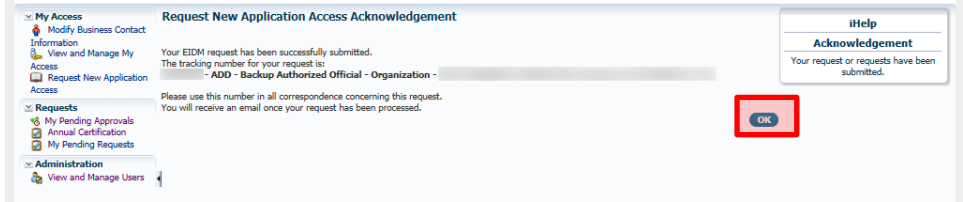
Step	Action	Screen Displayed
4	<p>For Connexion and DBidS:</p> <p>The Request Additional Role page will appear for the selected application. You must select your current role for DBidS and Connexion in the Select a Role drop down menu. You are restricted to choosing your existing role. For example, authorized officials can only select the authorized official role from the drop down menu.</p>	<p>The screenshots illustrate the process of requesting an additional role. The top screenshot shows the 'Request Additional Connexion Role' page. The middle screenshot shows the 'Request Additional DMEPOS Bidding System (DBidS) Role' page. The bottom screenshot shows the 'Request Additional Connexion Role' page with the 'Select a Role' dropdown menu open, showing 'Connexion Authorized Official(AO)' selected.</p>

Step	Action	Screen Displayed
5	<p>For Connexion and DBidS:</p> <p>If you have not already added MFA, the Request Additional Role page will appear with information on adding multi-factor authentication.</p> <p>If you would like to add a layer of protection to your user ID and password, you may choose to Add MFA to your account.</p> <p>Select Skip MFA to continue with the role request.</p> <p>Select Cancel to end the role request.</p>	 <p>The screenshots show the 'Request Additional Role' page for two different roles: 'Request Additional Connexion Role' and 'Request Additional DMEPOS Bidding System (DBidS) Role'. Both pages feature a sidebar with navigation options like 'My Access', 'Requests', and 'Administration'. The main content area includes 'My Role Information' with fields for 'My Roles' and 'Existing Role Details'. Below this is a section titled 'Multi-Factor Authentication Information' which explains that MFA adds an extra layer of security. It provides instructions on how to add MFA, skip MFA, or cancel the request. At the bottom of each page are three buttons: 'Add MFA', 'Skip MFA', and 'Cancel'.</p>

Step	Action	Screen Displayed
6	<p>You will have different options depending upon your role:</p> <p>AO – Complete steps 6 - 8.</p> <p>BAOs and EUs – Go to page 33 and complete steps 9-11.</p> <p>For Connexion:</p> <p>Enter the PTAN, TIN, and NPI you wish to add and the organization’s information in the Organization Information fields (for example, a unique PTAN and the company name and address). The PTAN, TIN, and NPI must match information on the CMS-855S application and reflected in PECOS.</p> <div data-bbox="226 857 898 987" style="border: 1px solid black; background-color: yellow; padding: 5px; margin: 10px 0;"> <p>Use the same PTAN and enter the same company information when requesting access to both the DBidS and Connexion applications.</p> </div> <p>Enter Reason for Request such as ‘Add a PTAN’ and click Next.</p> <p>For DBidS:</p> <p>Enter the PTAN and organization’s information in the Organization Information fields (for example, a unique PTAN and the company name and address.) The PTAN must be active and match data in PECOS.</p>	

Step	Action	Screen Displayed
	<p>Note: The PTAN can be any location that you intend to include on your bid to furnish items in the CBA(s).</p> <p>Enter Reason for Request such as 'Add a PTAN' and click Next.</p>	

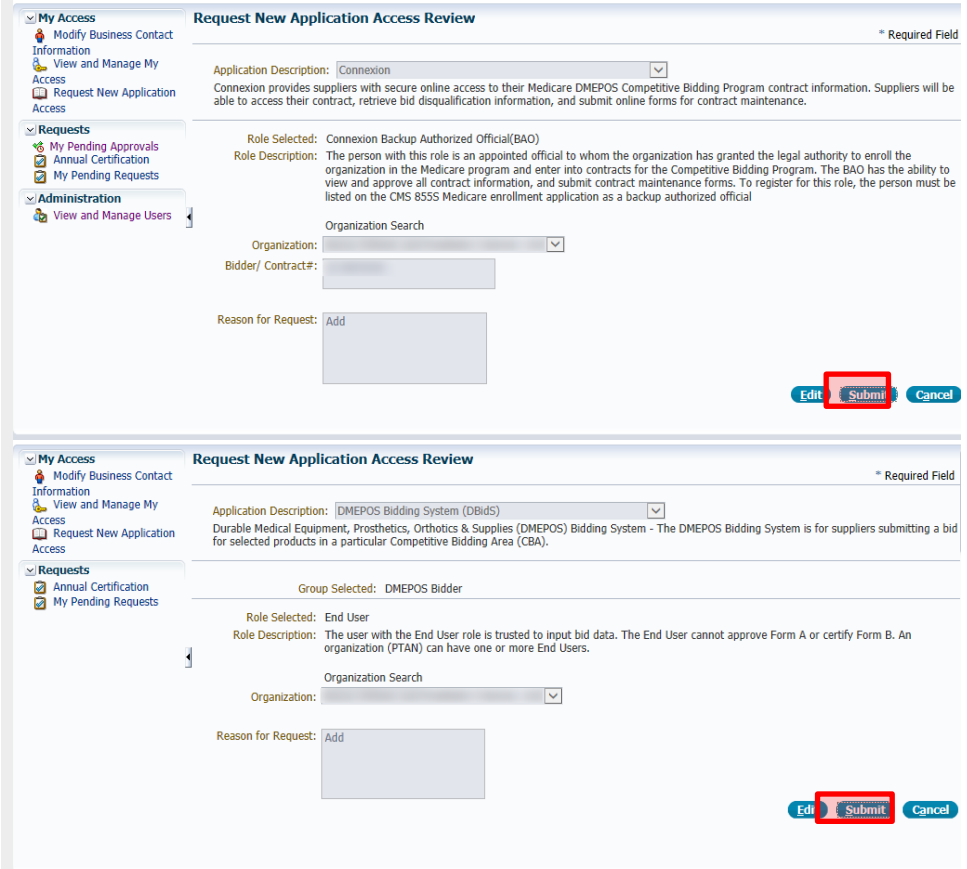
Step	Action	Screen Displayed
7	The Request New Application Access Review page will display the entered information. If the information is correct, click Submit .	 <p>The screenshot shows the 'Request New Application Access Review' page. The left sidebar contains navigation links: 'My Access' (Modify Business Contact Information, View and Manage My Access, Request New Application Access), 'Requests' (My Pending Approvals, Annual Certification, My Pending Requests), and 'Administration' (View and Manage Users). The main form area includes: <ul style="list-style-type: none"> Application Description: Connexion (marked as a required field). Description: Connexion provides suppliers with secure online access to their Medicare DMEPOS Competitive Bidding Program contract information. Role Selected: Connexion Authorized Official(AO). Description: The person with this role is an appointed official to whom the organization has granted the legal authority to enroll the organization in the Medicare program and enter into contracts for the Competitive Bidding Program. Fields: PTAN, TIN, NPI, Organization Legal Business Name, Organization Address Line 1, Organization Address Line 2, City, State/Territory (dropdown), Zip Code, Zip Code Extension, Company Telephone, Telephone Extension, Bidder/Contract#. Reason for Request: Add (dropdown). Buttons: Edit, Submit (highlighted with a red box), Cancel. </p>

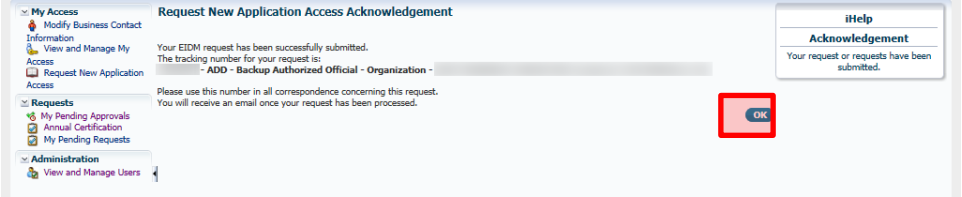
Step	Action	Screen Displayed
8	<p>For Connexion and DBidS:</p> <p>The Request New Application Access Acknowledgement page will display.</p> <p>Click OK to return to the View And Manage My Access page.</p> <p>Your role will take up to five minutes to display on the View And Manage My Access page.</p> <p>Click Log Out in the upper right hand side of the page, and wait five minutes before logging into the CMS Enterprise Portal and making any other changes to your account or accesses.</p>	

If the BAO or EU wishes to be associated with the added PTAN, he or she should complete steps 1-8 above. The BAO or EU must then complete steps 9 -11 below. The AO must approve the BAO's or EU's request to be associated with this PTAN. The BAO can also approve the EU's request.

Step	Action	Screen Displayed
9	<p>The BAO or EU must enter the same new PTAN added by the AO. Click Search, and using the Organization drop down box, select your company.</p> <p>For Connexion or DBidS:</p>	

Step	Action	Screen Displayed						
	<p>Enter Reason for Request such as 'Add a PTAN' and click Next.</p>	<p>The first screenshot shows the 'Request New Application Access' form. The sidebar on the left includes 'My Access', 'Requests', and 'Administration'. Under 'Administration', 'View and Manage Users' is selected. The main form area contains the following fields and options:</p> <ul style="list-style-type: none"> Application Description: Connexion Select a Role: Connexion Backup Authorized Official(BAO) Organization Search: * PTAN: [text input] Search Bidder/ Contract#: [text input] Reason for Request: [text input] <p>The second screenshot shows the 'Request Additional DMEPOS Bidding System (DBids) Role' form. The sidebar is not visible. The main form area contains the following fields and options:</p> <ul style="list-style-type: none"> Selected Application: DMEPOS Bidding System (DBids) My Role Information: <table border="1"> <thead> <tr> <th>My Roles</th> <th>Existing Role Details</th> </tr> </thead> <tbody> <tr> <td>End User</td> <td>[blurred]</td> </tr> <tr> <td>End User</td> <td>[blurred]</td> </tr> </tbody> </table> Select a Role: End User Organization Search: * PTAN: [text input] Search Organization: [dropdown menu] Reason for Request: [text input] 	My Roles	Existing Role Details	End User	[blurred]	End User	[blurred]
My Roles	Existing Role Details							
End User	[blurred]							
End User	[blurred]							

Step	Action	Screen Displayed
10	<p>For Connexion and DBidS:</p> <p>The Request New Application Access Review page will display with the entered information. If the information is correct, click Submit.</p>	 <p>The screenshots show the 'Request New Application Access Review' page with the following details:</p> <ul style="list-style-type: none"> Top Screenshot: <ul style="list-style-type: none"> Application Description: Connexion Role Selected: Connexion Backup Authorized Official(BAO) Role Description: The person with this role is an appointed official to whom the organization has granted the legal authority to enroll the organization in the Medicare program and enter into contracts for the Competitive Bidding Program. The BAO has the ability to view and approve all contract information, and submit contract maintenance forms. To register for this role, the person must be listed on the CMS 855S Medicare enrollment application as a backup authorized official. Organization Search: [Dropdown] Bidder/ Contract#: [Text Field] Reason for Request: Add [Text Field] Buttons: Edit, Submit (highlighted), Cancel Bottom Screenshot: <ul style="list-style-type: none"> Application Description: DMEPOS Bidding System (DBidS) Group Selected: DMEPOS Bidder Role Selected: End User Role Description: The user with the End User role is trusted to input bid data. The End User cannot approve Form A or certify Form B. An organization (PTAN) can have one or more End Users. Organization Search: [Dropdown] Organization: [Text Field] Reason for Request: Add [Text Field] Buttons: Edit, Submit (highlighted), Cancel

Step	Action	Screen Displayed
11	<p>The Request New Application Access Acknowledgement page will display.</p> <p>Click OK to be returned to the View and Manage My Access page.</p> <p>Your role will not display on the View And Manage My Access page until the AO or BAO has approved your role request.</p> <p>Click Log Out in the upper right hand side of the page, and wait until the AO or BAO has approved your role request. You will receive an email when approval is granted.</p>	

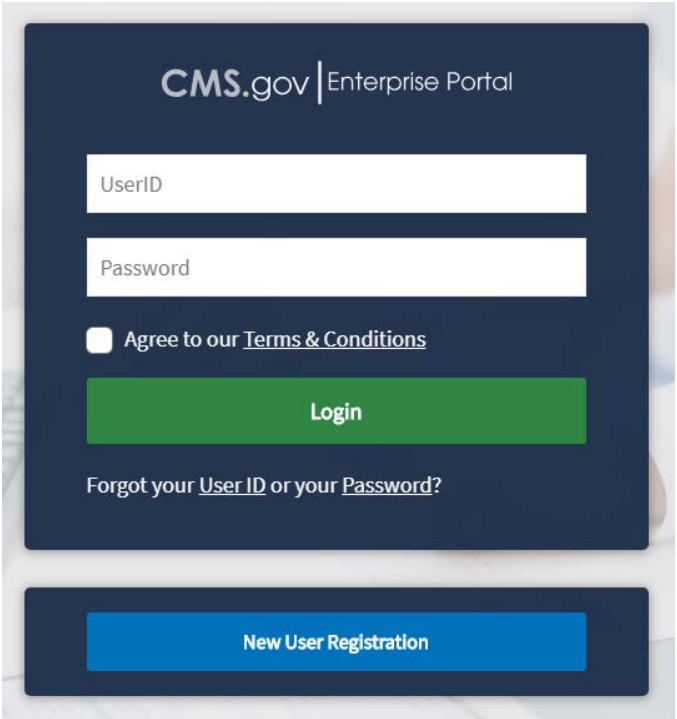
D: Approving/Rejecting User Requests

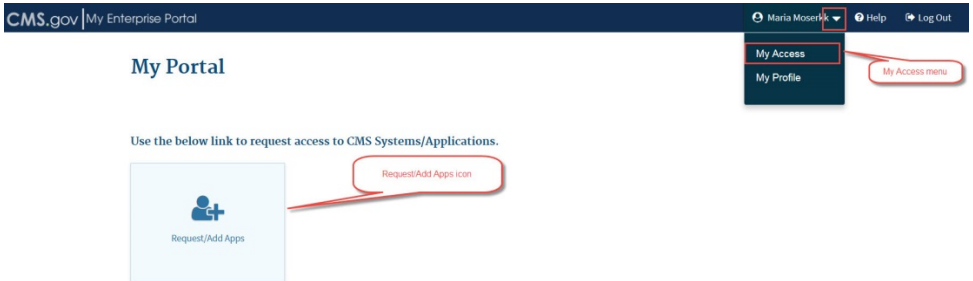
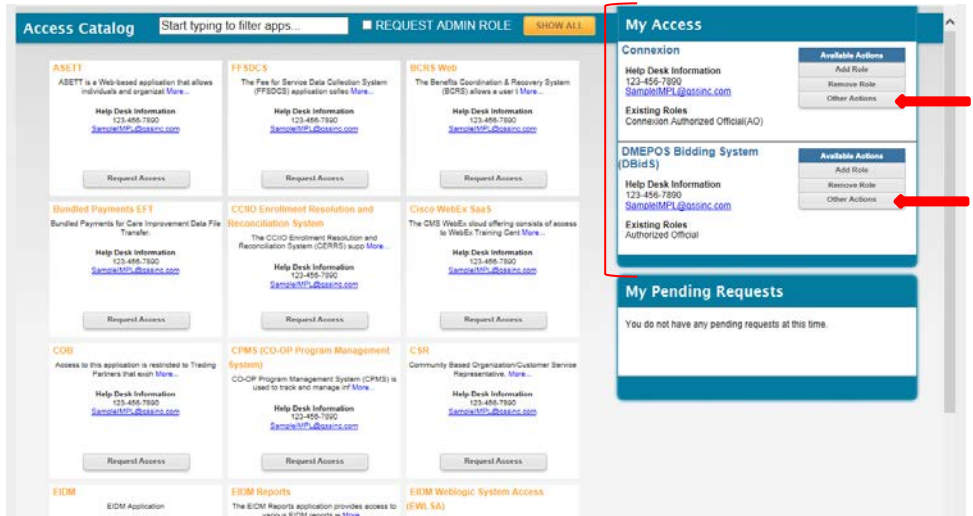
The authorized official (AO) and/or backup authorized official (BAO) must approve registration requests from others in their organization to have access to DBidS and Connexion. The AO is the only role that can approve or reject a BAO's request to access an organization's bid, modify information, and view and complete forms or documents in Connexion. The AO and a BAO can also approve or reject an end user's (EU) request to access an organization's bid, modify information, or access Connexion. This approval/rejection process can only occur after the BAO or EU has registered as a new DMEPOS user in the CMS Enterprise Portal. AOs will receive an email notification informing them that a pending approval request is in their queue awaiting action.

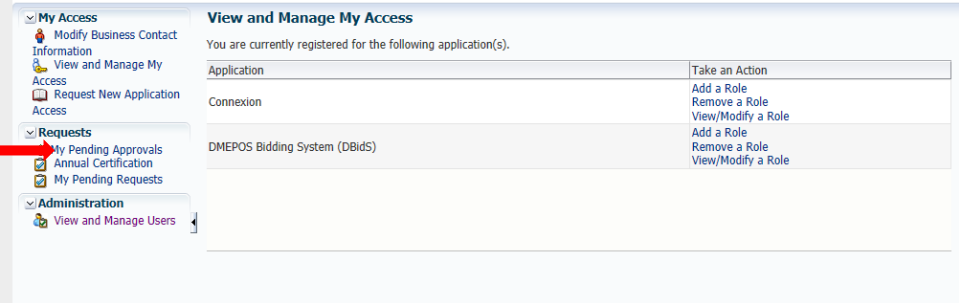
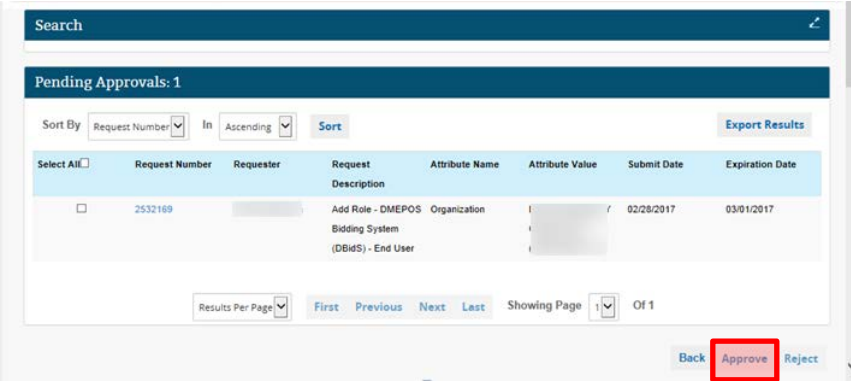
If no action is taken on an approval request within 15 days, the CMS Enterprise Portal will automatically send a reminder email to the AO and BAO(s). These reminders will continue to be sent every 15 days until the request is approved or until the request expires. All approval requests will expire if not processed within 60 days.

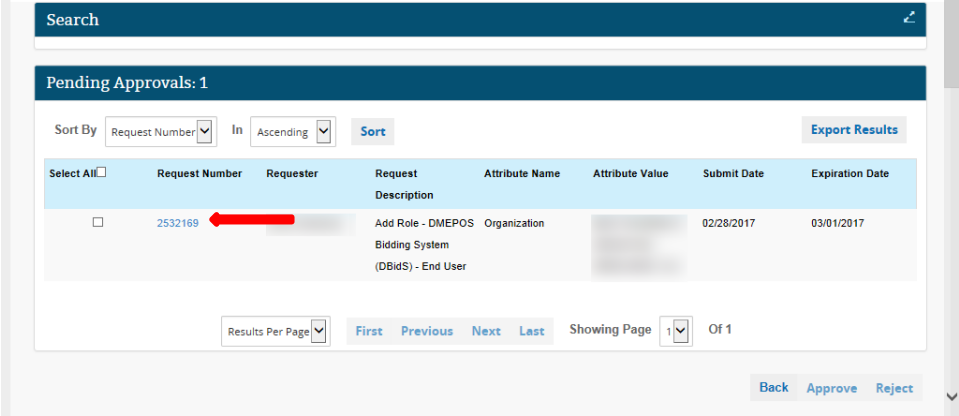
The following instructions detail how to approve or reject requests for organization access.

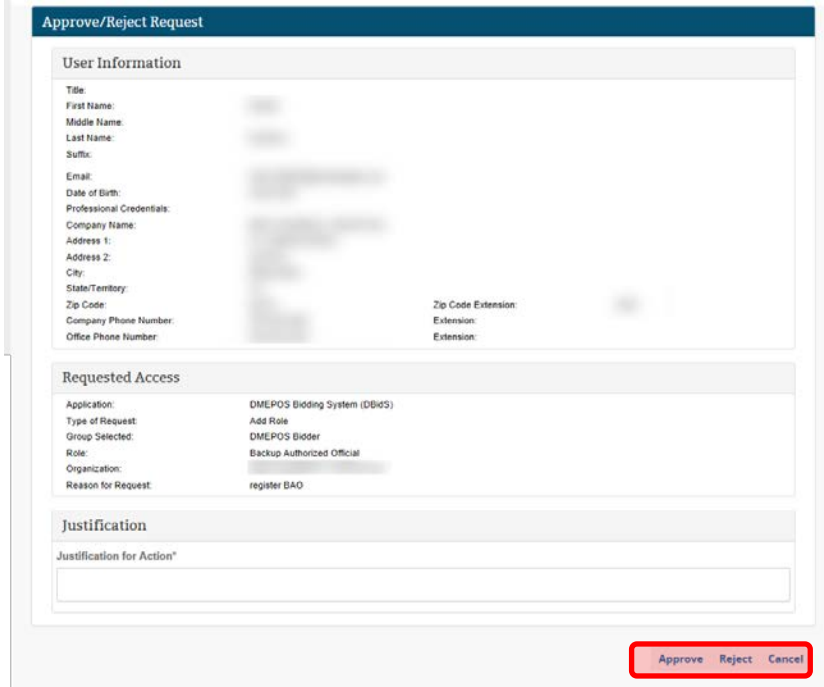
Step	Action	Screen Displayed
1	Visit the Round 2021 home page on the CBIC website. Go to Registration . Click Register Now . OR Go to Portals and then click CMS Enterprise Portal . Click Register Now .	

Step	Action	Screen Displayed
2	<p>Enter your user ID and password and select Login.</p> <p>Note: If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	

Step	Action	Screen Displayed
3	<p>On the CMS Enterprise Portal screen, click Request/Add Apps icon.</p> <p>You may also select the down arrow next to your name in the upper right side of the screen, then select My Access from the drop down menu.</p>	
4	<p>The Access Catalog, My Access and My Pending Requests panels will display.</p> <p>In the My Access section, select Other Actions.</p>	

Step	Action	Screen Displayed
5	On the View and Manage My Access screen, select My Pending Approvals .	
6	<p>The Pending Approvals page will display with all pending approvals listed.</p> <p>From this page you may select individual requests or you may click the check box next to Select All and approve or reject multiple requests at one time. A 'Justification for Action' field will appear at the bottom of the page. Enter text and click Approve (or Reject).</p>	

Step	Action	Screen Displayed
7	<p>If you would like to review an individual request, click the Request Number.</p> <p>Note: AOs can export an Excel report of all pending requests from BAOs and EUs. Simply click on Export Results located above the list of pending request(s). A pop-up box will appear asking if you would like to open, save or cancel this file. To save the file, click Save As and select a folder. To open the folder, either select Open from the pop-up box or locate the file you saved in the applicable folder.</p>	 <p>The screenshot displays a web interface for managing pending approvals. At the top, there is a search bar and a header indicating 'Pending Approvals: 1'. Below this, there are sorting options: 'Sort By Request Number', 'In Ascending', and a 'Sort' button. An 'Export Results' button is also present. The main content is a table with the following columns: 'Select All', 'Request Number', 'Requester', 'Request Description', 'Attribute Name', 'Attribute Value', 'Submit Date', and 'Expiration Date'. A single row is visible with the request number 2532169, which is highlighted by a red arrow. The request description is 'Add Role - DMEPOS Organization Bidding System (DBidS) - End User'. The submit date is 02/28/2017 and the expiration date is 03/01/2017. At the bottom, there are pagination controls including 'Results Per Page', 'First', 'Previous', 'Next', 'Last', 'Showing Page 1 Of 1', and action buttons 'Back', 'Approve', and 'Reject'.</p>

Step	Action	Screen Displayed
8	<p>The Approve/Reject Request page will display, listing the requester's information.</p> <p>To approve or reject the request, enter a justification for action in the Justification for Action field.</p> <p>To approve the request, click the Approve button.</p> <p>To reject the request, click the Reject button.</p> <p>To cancel the request, click the Cancel button.</p> <p>If you choose to cancel the request and take no action, select Cancel and the pending request on the My Pending Approvals page will be cancelled for all of the applications' authorized approvers. Any information entered in the Justification for Action box will not be saved for deferrals.</p> <p>Note: After selecting Approve, Reject, or Cancel, you will be returned to the Pending Approvals page. The request you approved, rejected, or canceled will be displayed until you select Refresh.</p>	 <p>The screenshot displays the 'Approve/Reject Request' interface. It is divided into three main sections: 'User Information', 'Requested Access', and 'Justification'. The 'User Information' section lists fields such as Title, First Name, Middle Name, Last Name, Suffix, Email, Date of Birth, Professional Credentials, Company Name, Address 1, Address 2, City, State/Territory, Zip Code, Zip Code Extension, Company Phone Number, Office Phone Number, Extension, and Extension. The 'Requested Access' section shows details for the 'DMEPOS Bidding System (DBIDS)', including the Type of Request (Add Role), Group Selected (DMEPOS Bidder), Role (Backup Authorized Official), Organization, and Reason for Request (register BAO). The 'Justification' section contains a text input field labeled 'Justification for Action*'. At the bottom right, there are three buttons: 'Approve', 'Reject', and 'Cancel', which are highlighted with a red border in the image.</p>

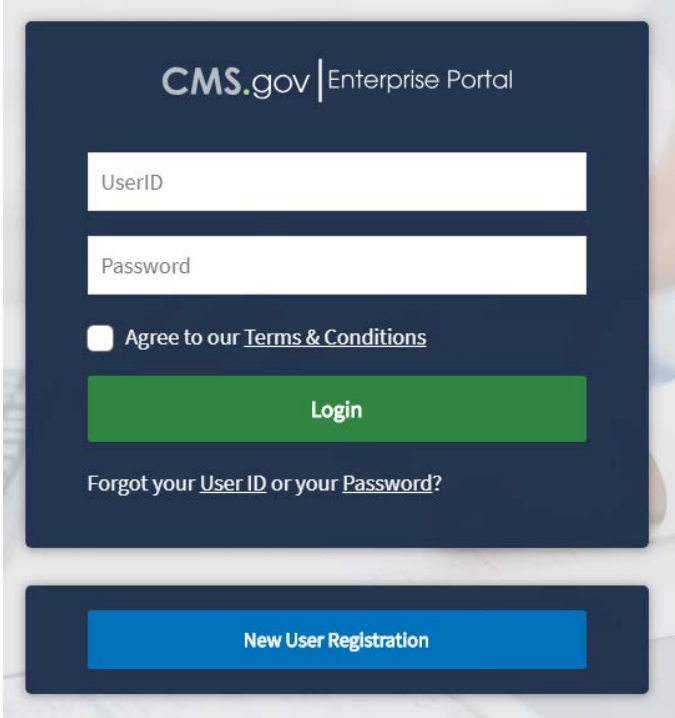
E: Removing a Role from Your Access

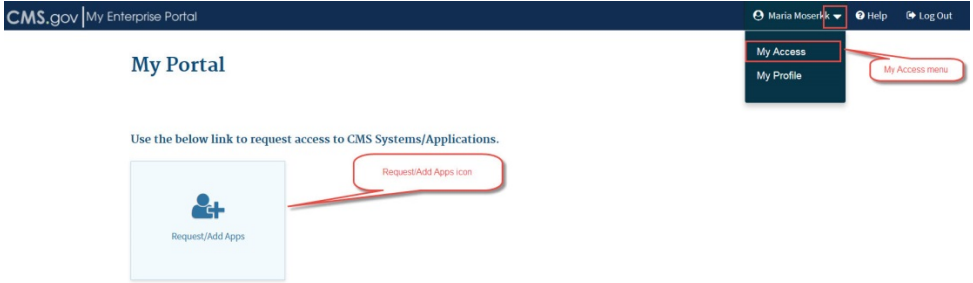
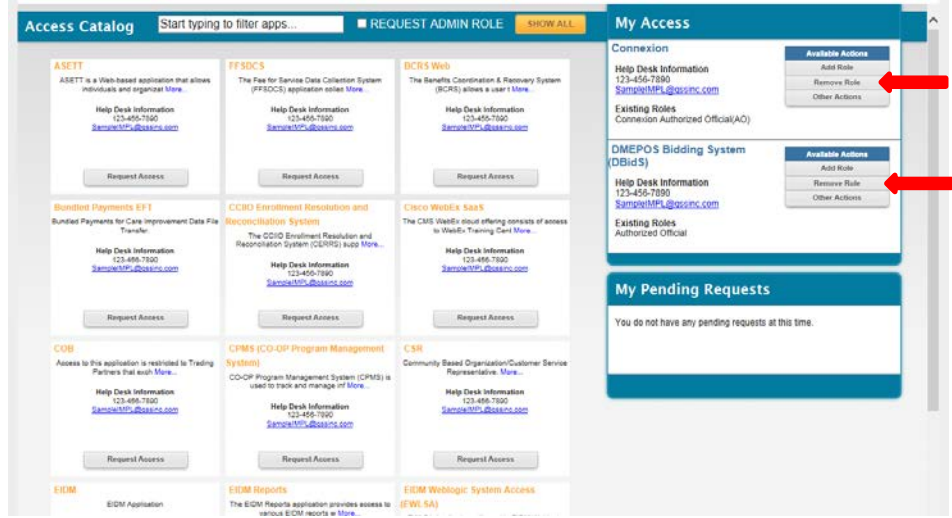
BAOs and EUs may remove their role in order to associate to another role. AOs may remove their own role if they are the **only** member of their organization registered in the CMS Enterprise Portal.

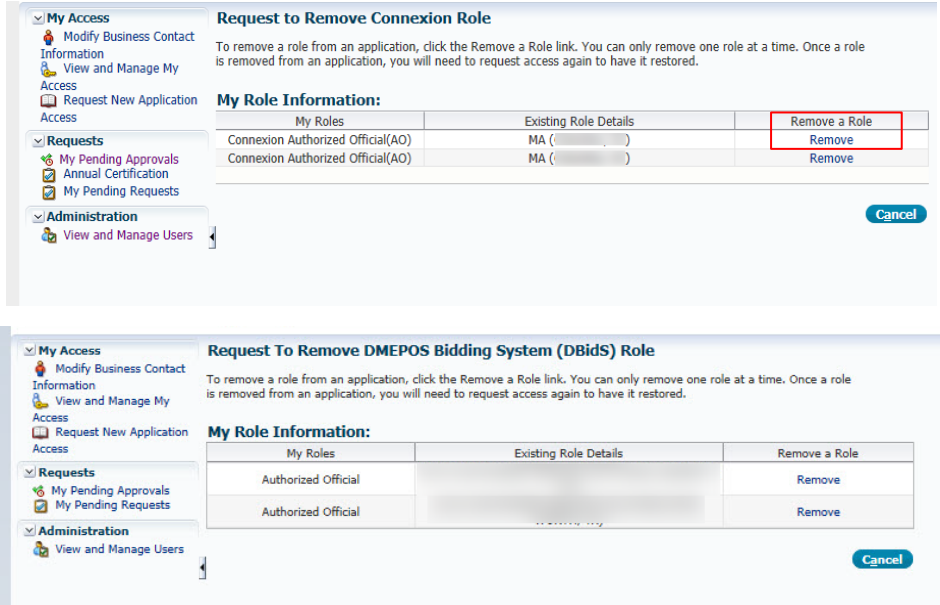
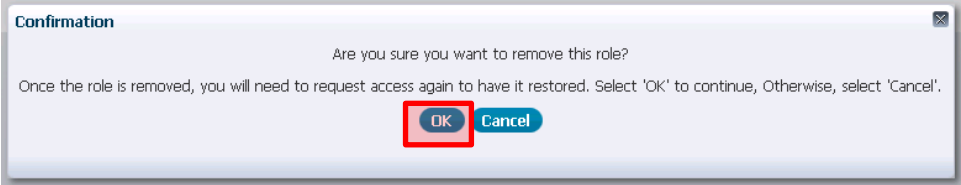
AOs who have a BAO or EU in their organization registered in the CMS Enterprise Portal and need to remove any role (AO, BAO, or EU) must contact the CBIC customer service center at 877-577-5331.

If an EU is removed from that role, he or she may be promoted to a BAO or AO (if included on the CMS-855S application as an AO) by registering again in the CMS Enterprise Portal for the new role. If necessary, updates to the CMS-855S application must be submitted in PECOS or with the NSC. The NSC has up to 45 days to verify and update PECOS. Once the DBidS registration window closes, CMS Enterprise Portal users may not request new roles for DBidS. However, new users may be added for Connexion at any time.

Step	Action	Screen Displayed
1	Visit the Round 2021 home page on the CBIC website. Go to Registration . Click Register Now . OR Go to Portals and then click CMS Enterprise Portal . Click Register Now .	

Step	Action	Screen Displayed
2	<p>Enter your user ID and password and select Login.</p> <p>Note: If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	

Step	Action	Screen Displayed
3	<p>On the CMS Enterprise Portal screen, click Request/Add Apps icon.</p> <p>You may also select the down arrow next to your name in the upper right side of the screen, then select My Access from the drop down menu.</p>	
4	<p>The Access Catalog, My Access, and My Pending Requests panels will appear.</p> <p>In the My Access panel, your current roles will appear.</p> <p>Select Remove Role for the specific application – Connexion or DBidS.</p>	

Step	Action	Screen Displayed
5	<p>For Connexion and DBidS:</p> <p>The Request to Remove Role page will display. Under the Remove a Role column, select Remove for the role you want to remove.</p>	 <p>The screenshots show the 'Request to Remove Role' page. The top screenshot is for 'Request to Remove Connexion Role' and the bottom is for 'Request to Remove DMEPOS Bidding System (DBidS) Role'. Both pages include a navigation menu on the left, a title, a description, and a table of roles. In the top screenshot, the 'Remove a Role' button in the table is highlighted with a red box. In the bottom screenshot, the 'Remove' buttons in the table are visible.</p>
6	<p>For Connexion and DBidS:</p> <p>A box will appear with a confirmation statement. The confirmation statement reads: “Are you sure you want to remove this role? Once the role is removed, you will need to request access again to have it restored.”</p> <p>Select OK to remove the role or Cancel to keep the current role.</p>	 <p>The screenshot shows a confirmation dialog box titled 'Confirmation'. The text inside reads: 'Are you sure you want to remove this role? Once the role is removed, you will need to request access again to have it restored. Select 'OK' to continue, Otherwise, select 'Cancel'.' The 'OK' button is highlighted with a red box.</p>

Step	Action	Screen Displayed
7	<p>For Connexion and DBidS:</p> <p>The Request to Remove Role Acknowledgement screen will appear.</p> <p>Click OK to be returned to the View and Manage My Access page.</p>	

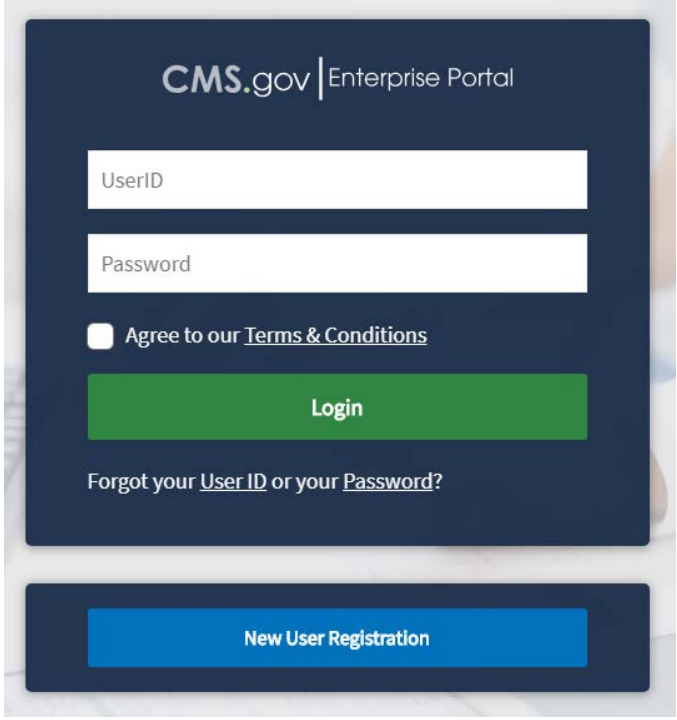
After completing this process, if you wish to be assigned a different role, complete the steps in the **Requesting Access to DBidS** and **Requesting Access to Connexion** sections. **Note:** Remember, you must have the same role for both DBidS and Connexion.

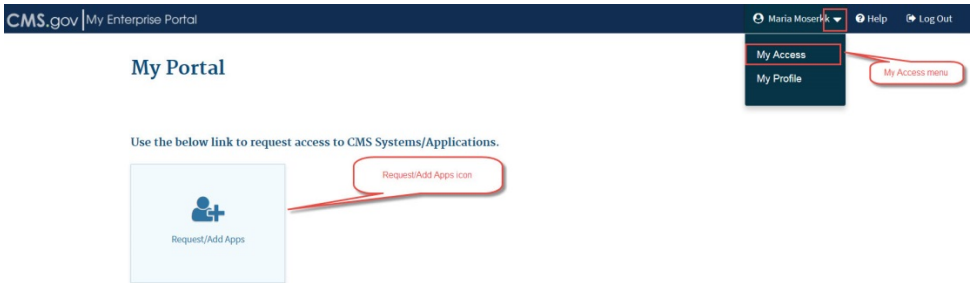
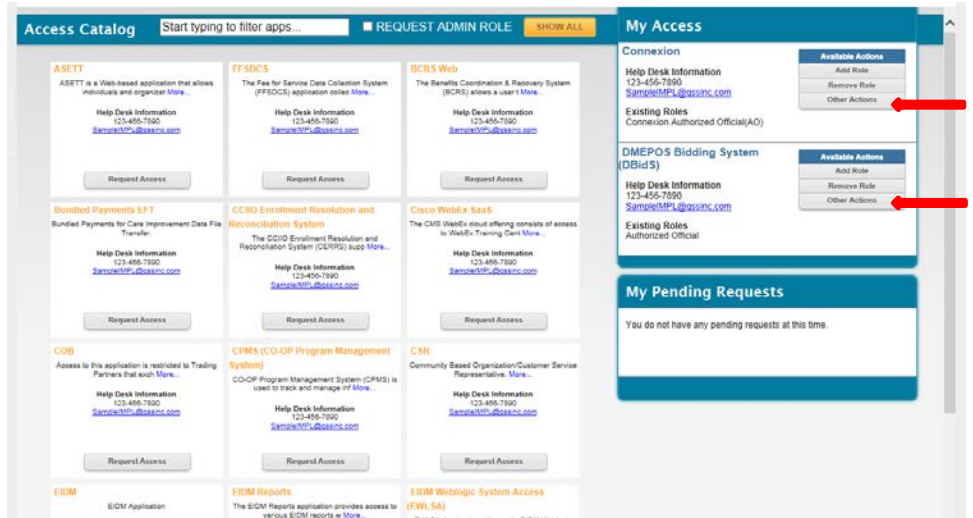
F: Updating Your Organization's Information

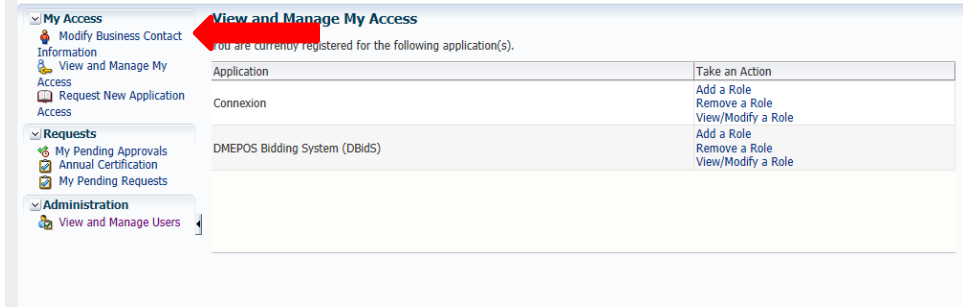
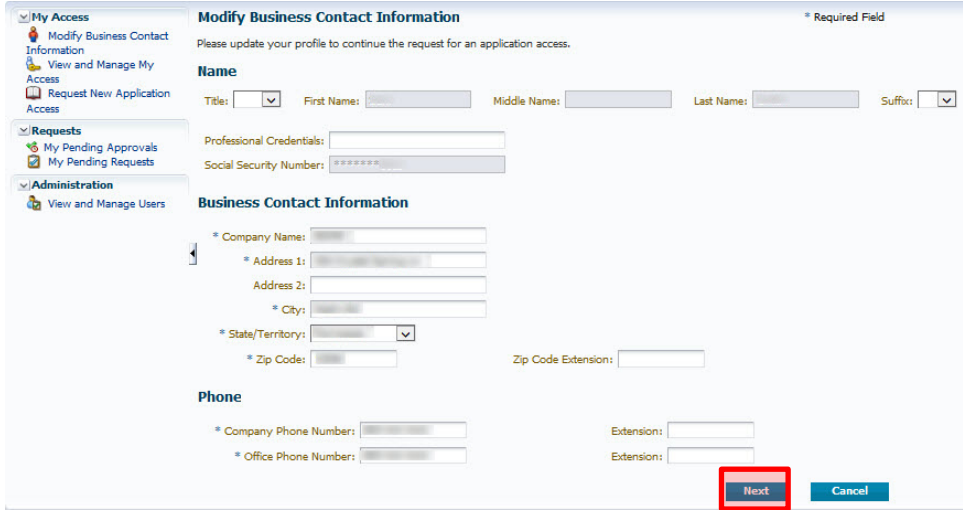
There may be times before or after the bid window closes when your organization's information will need to be updated to change the business name, address and/or add a new telephone number. Depending on your role, you may be able to view and/or edit your organization's access. If you are an AO, you can view and edit the organization fields. If you are a BAO or an EU, you are only allowed to view the information in the organization fields.

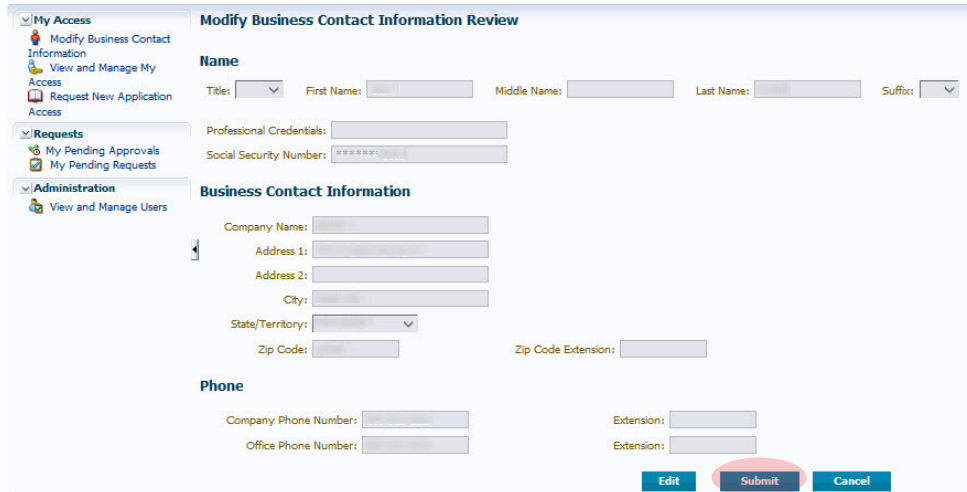

To modify an organization's information, the AO should complete the following steps.

Step	Action	Screen Displayed
1	Visit the Round 2021 home page on the CBIC website. Go to Registration . Click Register Now . OR Go to Portals and then click CMS Enterprise Portal . Click Register Now .	

Step	Action	Screen Displayed
2	<p>Enter your user ID and password and select Login.</p> <p>Enter your password and select Log In.</p> <p>Note: If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	

Step	Action	Screen Displayed
3	<p>The CMS Enterprise Portal page will appear.</p> <p>Click Request Access Now.</p> <p>You may also select the down arrow in the upper right hand corner, then select My Access from the drop down menu.</p>	
4	<p>The Access Catalog, My Access, and My Pending Requests panels will display.</p> <p>Select Other Actions in the My Access section for the applicable application. If you have access to both DBidS and Connexion, you may select either Connexion or DBidS.</p>	

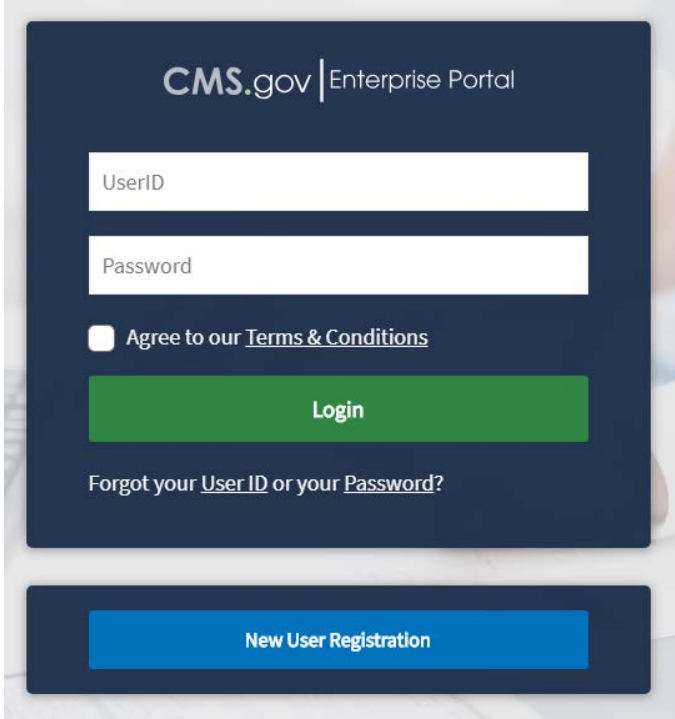

Step	Action	Screen Displayed
5	<p>The View And Manage My Access page will display.</p> <p>Select Modify Business Contact Information in the left hand navigation pane.</p>	
6	<p>The Modify Business Contact Information page will appear. View or edit the information in these fields.</p> <p>Once the changes are completed, click Next.</p> <p>Note: The fields in gray contain information that cannot be modified.</p> <p>If you do not need to make any changes to the Modify Business Contact Information, click Cancel to exit this screen.</p>	

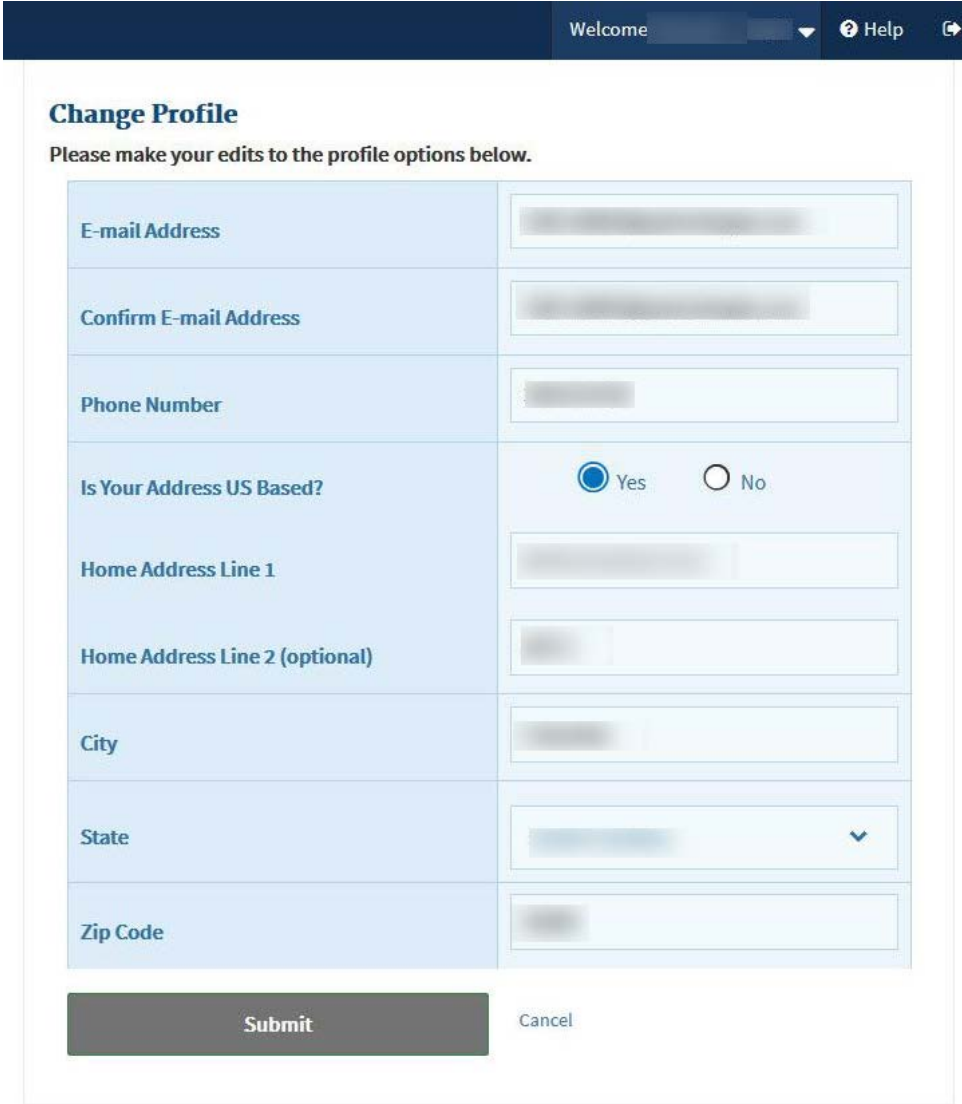
Step	Action	Screen Displayed
7	<p>The Modify Business Contact Information Review screen will appear. If you are satisfied with your changes, click Submit.</p> <p>If you need to update or correct your changes, click Edit. You will be taken back to the Modify Business Contact Information screen.</p> <p>If you wish to cancel your changes, click Cancel.</p> <div data-bbox="237 621 907 724" style="border: 1px solid black; background-color: yellow; padding: 5px;"> <p>Note: Your modification will not be completed until you click Submit.</p> </div>	
8	<p>The Modify Business Contact Information Acknowledgement screen contains a tracking number for your request. Record this tracking number and use it if you have questions regarding the status of your request.</p> <p>Click OK to close the acknowledgement page and be returned to the View And Manage My Access page.</p>	

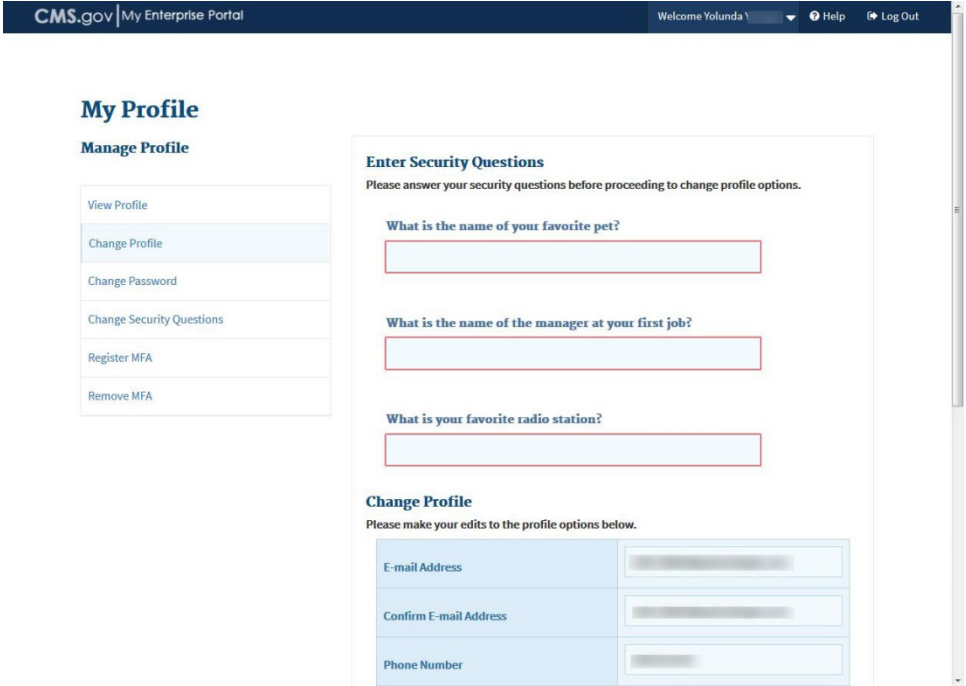
G: Updating Your Contact Information

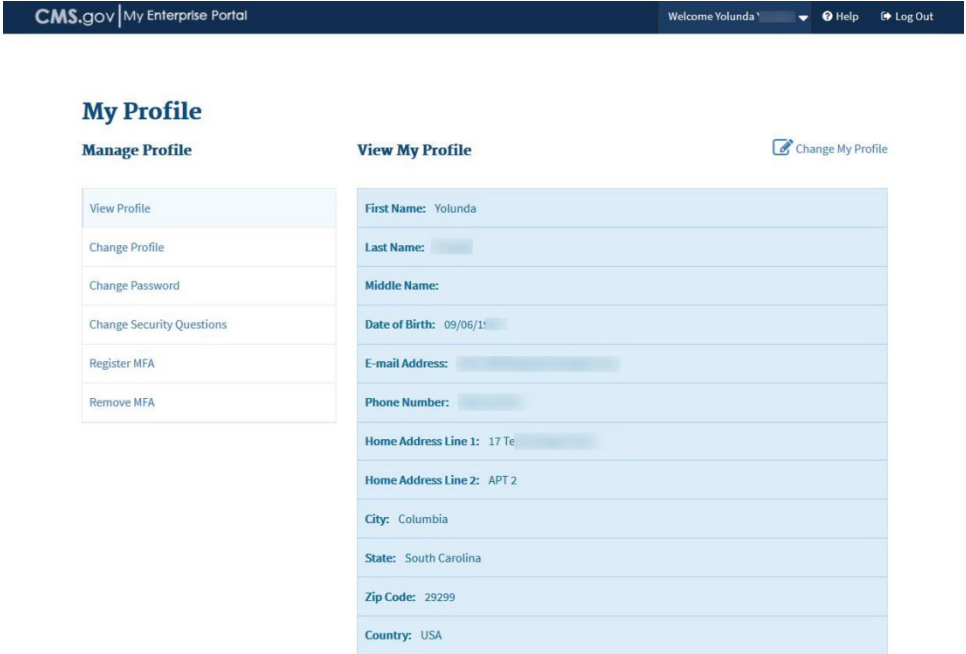
It is very important for all users (AOs, BAOs, and EUs) to keep their contact information (such as an email address, telephone number or address) current in CMS Enterprise Portal at all times. Many critical notices are sent to the email address on file in the CMS Enterprise Portal. If you need to update contact information (such as an email address, telephone number or address), you should do so in the CMS Enterprise Portal.

Step	Action	Screen Displayed
1	Visit the Round 2021 home page on the CBIC website. Go to Registration . Click Register Now . OR Go to Portals and then click CMS Enterprise Portal . Click Register Now .	

Step	Action	Screen Displayed
2	<p>Enter your user ID and password and select Login.</p> <p>Note: If you have requested a multi-factor authentication (MFA), you will be prompted to select your MFA device and enter your security code.</p> <p>Note: If after three attempts you are unable to successfully enter your user ID and/or password, your account will be locked for 60 minutes. You may attempt to log in again after 60 minutes. You may also recover your user ID and password by using the Forgot User ID link or the Forgot Password link at the bottom of the login screen. For Forgot User ID, you will receive an email with your user ID. For Forgot Password, you will need to enter your user ID, answer the three challenge questions, and create a new password. You have three chances to answer all these questions correctly. If you try three times and do not succeed, your account will be locked. If you are still having issues, you can call the CBIC customer service center at 877-577-5331 for assistance.</p>	
3	<p>On the My Portal page, select the down arrow next to your name on the upper right side of the page.</p> <p>Select My Profile from the drop down menu.</p>	

Step	Action	Screen Displayed
4	<p>The View My Profile page will appear.</p> <p>In the left hand navigation pane, click the arrow next to Change My Profile to display the changes you can make to your CMS Enterprise Portal profile. You will be prompted to answer security questions for all changes.</p> <ul style="list-style-type: none"> - View profile - Change profile - Change password - Change Security Questions - Register MFA - Remove MFA <p>Click on one of the links to change the selected information.</p> <div style="border: 1px solid black; background-color: yellow; padding: 5px; margin: 10px 0;"> <p>Note - The following fields cannot be modified:</p> <ul style="list-style-type: none"> • First Name • Last Name • Date of Birth <p>This is to protect others from accessing and modifying your account. To update this information for the CMS Enterprise Portal, you must contact the CBIC customer service center at 877-577-5331.</p> </div> <p>You will receive an email notification when your profile is updated.</p>	

Step	Action	Screen Displayed
5	<p>For security purposes, you will need to answer all of the security questions before changing any contact information.</p> <p>Note: You established your security questions at the same time you created your user ID and password when you initially registered in the CMS Enterprise Portal.</p> <p>Enter the new information and select Submit.</p>	 <p>The screenshot displays the 'My Profile' page on CMS.gov. At the top, there is a navigation bar with 'CMS.gov My Enterprise Portal' on the left, 'Welcome Yolunda Y' on the right, and links for 'Help' and 'Log Out'. Below the navigation bar, the page is titled 'My Profile' and features a 'Manage Profile' sidebar with the following options: View Profile, Change Profile, Change Password, Change Security Questions, Register MFA, and Remove MFA. The main content area is divided into two sections. The first section is 'Enter Security Questions', which includes the instruction 'Please answer your security questions before proceeding to change profile options.' and three questions, each with a corresponding text input field: 'What is the name of your favorite pet?', 'What is the name of the manager at your first job?', and 'What is your favorite radio station?'. The second section is 'Change Profile', with the instruction 'Please make your edits to the profile options below.' and three input fields: 'E-mail Address', 'Confirm E-mail Address', and 'Phone Number'.</p>

Step	Action	Screen Displayed
6	<p>The View My Profile page will display, showing the updated information.</p> <p>A confirmation message will display at the top of the page.</p> <p>Click the X on the confirmation message to close it.</p>	 <p>The screenshot shows the 'My Profile' page in the CMS.gov My Enterprise Portal. At the top, there is a navigation bar with 'CMS.gov My Enterprise Portal' on the left and 'Welcome Yolunda', 'Help', and 'Log Out' on the right. Below the navigation bar, the page is titled 'My Profile'. On the left side, there is a 'Manage Profile' menu with the following options: View Profile, Change Profile, Change Password, Change Security Questions, Register MFA, and Remove MFA. On the right side, there is a 'View My Profile' section with a 'Change My Profile' link. The profile information is displayed in a light blue box with the following details: First Name: Yolunda, Last Name: [redacted], Middle Name: [redacted], Date of Birth: 09/06/19[redacted], E-mail Address: [redacted], Phone Number: [redacted], Home Address Line 1: 17 Te [redacted], Home Address Line 2: APT 2, City: Columbia, State: South Carolina, Zip Code: 29299, and Country: USA.</p>