

Centers for Medicare & Medicaid Services

EDGE Server Job Aid
AWS Account Set-Up

Version 1.0
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Step 1

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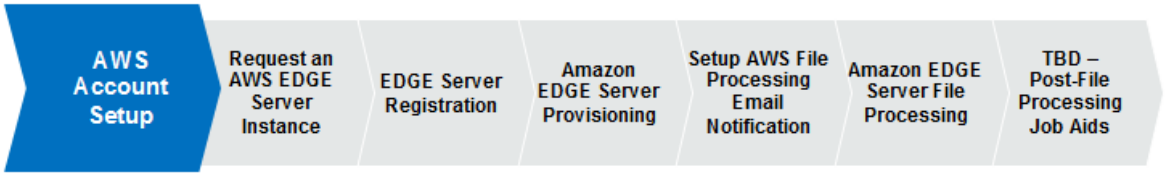
1. Introduction

This document provides an overview of the steps Amazon EDGE server issuers must take to establish an Amazon Web Services (AWS) account.

The figures captured in this job aid are from the Firefox web browser. Images displayed will vary depending on the web browser used.

The following process map provides an overview of the steps you need to take to operate your Amazon EDGE server and reflects the current step you're executing. Each step below has corresponding training materials (job aids and video demos as applicable) available via REGTAP. Please make sure to reference all the available materials and confirm that you have completed the steps for each phase before moving onto the next.

Amazon EDGE Server



2. Creating an AWS Account

The initial step for establishing an AWS EDGE server is to create an Amazon Web Services Account.

For EDGE server support, please send all questions to CMS Help Desk email:
CMS_FEPS@cms.hhs.gov or call 1-855-CMS-1515.

In addition to this guide, an Amazon developed YouTube video on "Creating an Amazon Web Services Account" is accessible via the following link:
https://www.youtube.com/watch?v=WviHsoz8yHk

1. Issuers should first go to ***http://aws.amazon.com/***. Next, click the **Create a Free Account.**



Figure 1 – Amazon Web Services

2. On the next page, complete the following:

    a. Click on ***"I am a new user"***

    b. Enter an email address

    c. Click ***"Sign in using our secure server"***

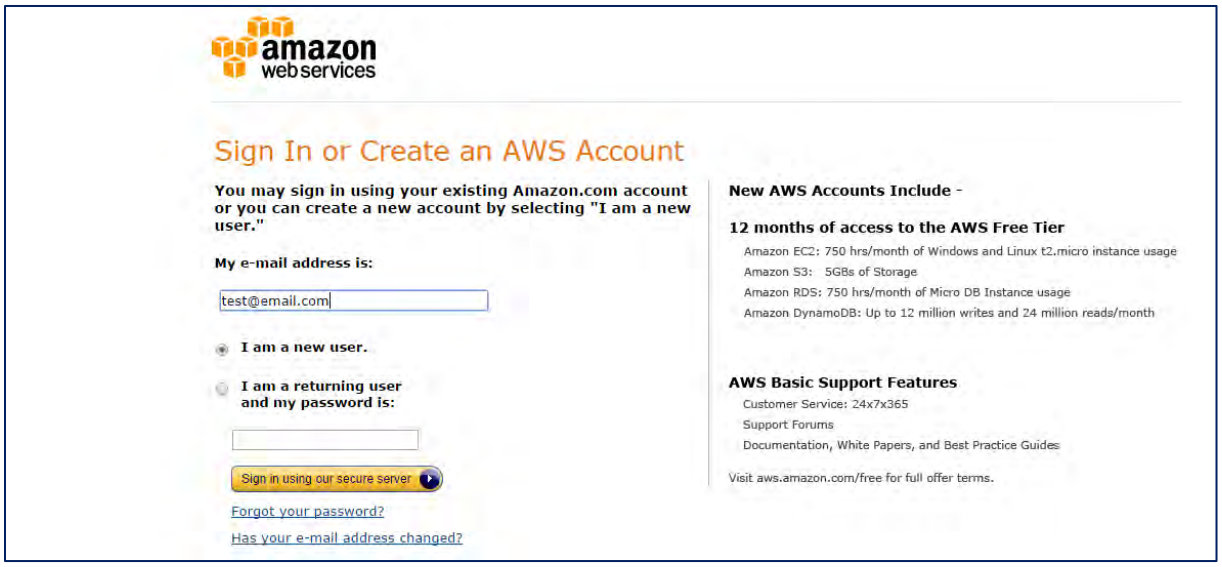


Figure 2 – AWS Create Account Screen

NOTE: A new AWS account must be created for each issuer EDGE server to be provisioned in order to support the migration process. In the event an issuer must transfer hosting to or from a Third Party Administrator (TPA), ownership of the AWS account must be transferred as well.



Figure 3 – Sign In or Create an AWS Account

3. Issuers will now be taken to the next screen, the ***"Login Credentials"*** screen, to create login credentials.

    a. Enter your name

    b. Re-type your email address

    c. Enter your password

    d. Enter your password a second time and click **Continue**

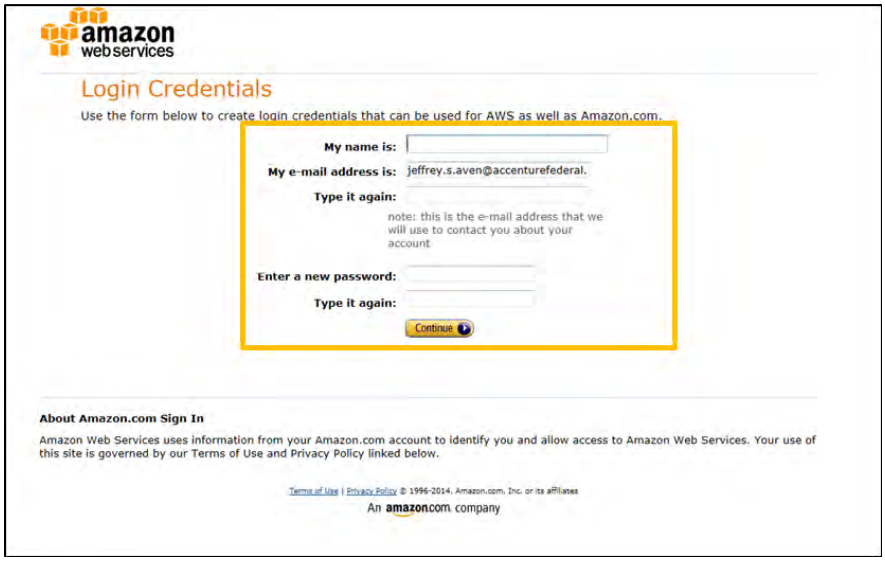


Figure 4 – Enter Login Credentials

4. On the next page, a message will indicate you have not signed up for AWS. Click the **sign up for AWS** link to continue.



Figure 5 – Sign up for AWS

5. The **Contact Information** page should appear. Enter your Contact Information, complete the Security Check, and read and agree to the terms of the Amazon Web Services Customer Agreement.

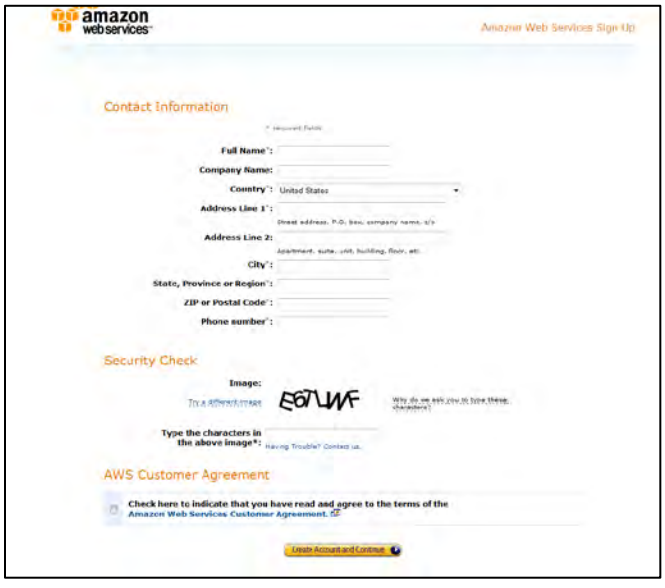


Figure 6 – Enter in Contact Information

6. Issuers should now enter payment information on the ***Enter Your Payment Information*** section of the screen and then ***Enter Your Billing Address***. Issuers will not be billed at this point in time and will only be billed if they choose to purchase additional AWS support or functionality. Issuers may choose to work with AWS to convert their account to an invoicing method. Charges will begin when the Amazon EDGE server is on and operating. However, all AWS accounts are started with a credit card.



Figure 7 – Enter in Payment Information

7. Issuers should now enter in phone information and click **Call Me Now.**

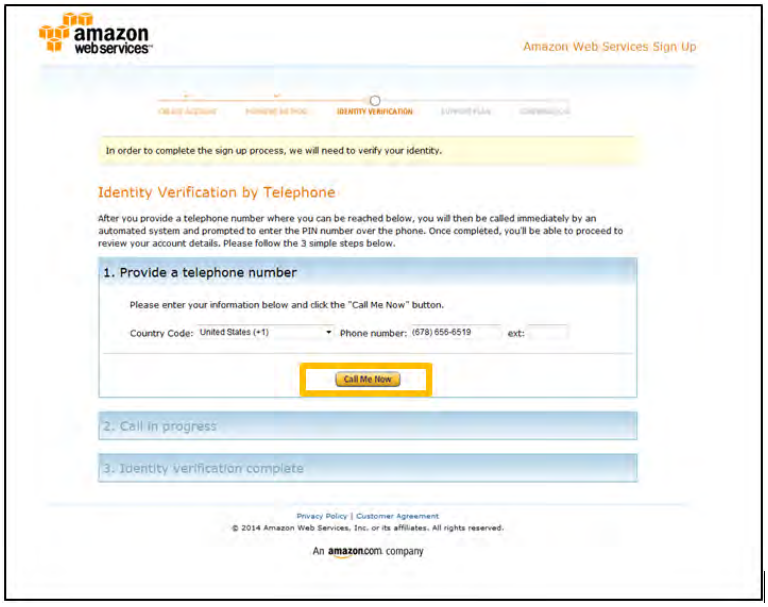


Figure 8 – Provide a Telephone Number

8. A PIN will be displayed on the Issuer's screen. AWS will call the number you provided and ask for the PIN displayed. Enter the PIN on your phone when prompted.

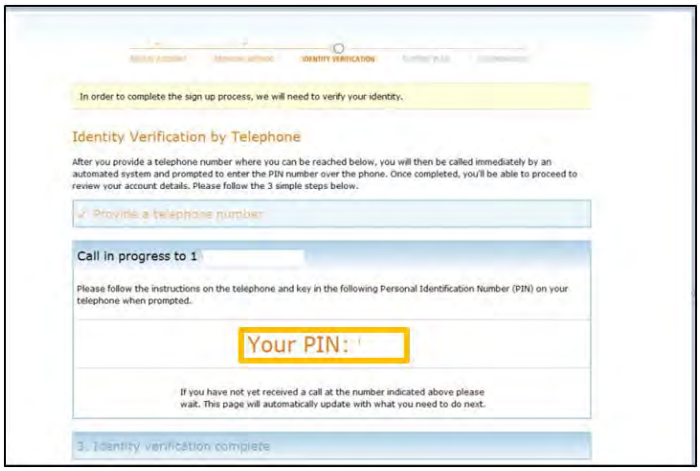


Figure 9 – Identity Verification PIN

9. Issuers should click **Continue** to complete identity verification**.**

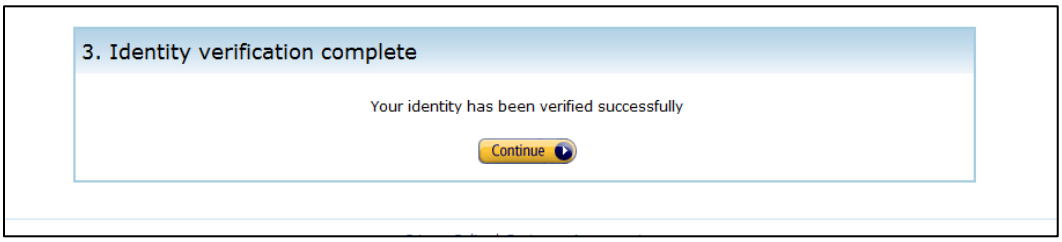


Figure 10 – Click Continue to Complete Identity Verification

10. Issuers must select a support plan and then click **Continue.** AWS customers can change their level of support at any time should their support needs change.

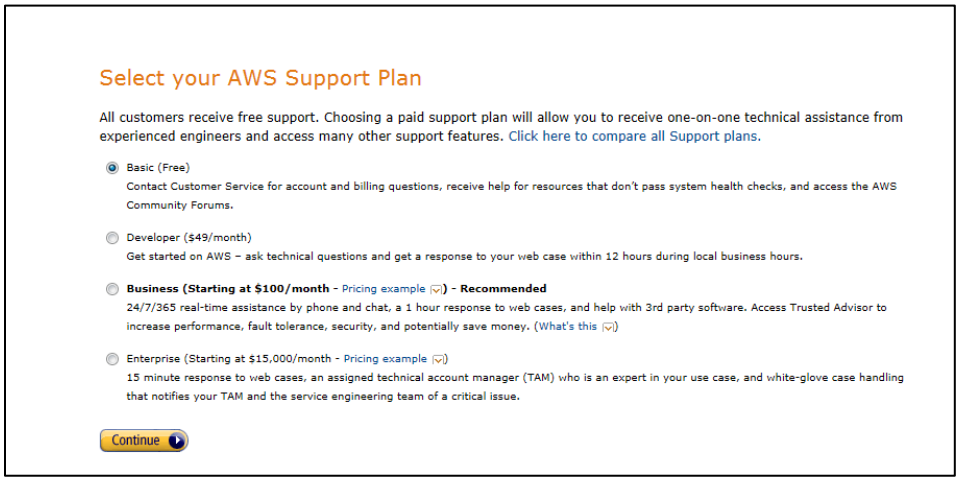


Figure 11 – Select your AWS Support Plan

11. Issuers are now registered for an AWS Account!



Figure 12 – AWS Account Set-Up Complete

OPTIONAL: Request Service Limit Increase

The following steps are OPTIONAL and only intended for issuers who require more than 20 EDGE server instances. Issuers who require more than 20 must request a service limit increase from AWS so that their server can be provisioned by CMS at the desired size. Since it typically takes AWS 48 hours to process these requests, issuers will need to complete this step prior to requesting an AWS EDGE server instance. For issuers who need more than 20 server instances, it is highly recommended that the service increase request be submitted to AWS when you are at 18 instances, in order to allow a few extra instances without hitting the 20 instance limit.

1. Issuers must first click on the ***Help*** dropdown in the upper right corner of the screen.

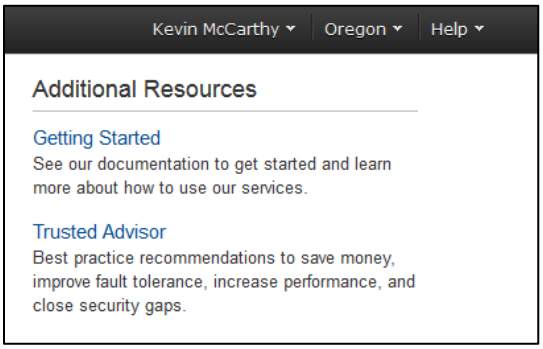


Figure 13 – Help Dropdown Location

2. Issuers must then select ***Support*** from the choices available in the Help dropdown.

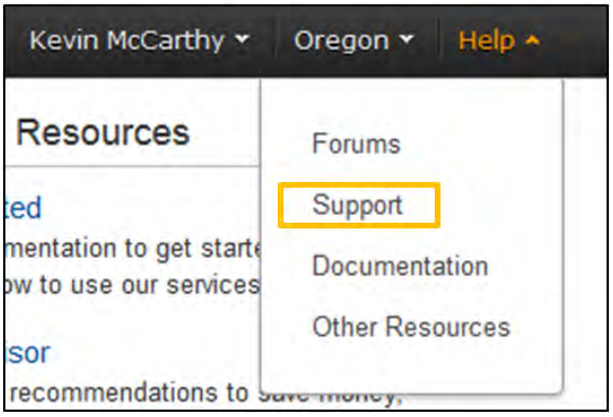


Figure 14 – Expanded Help Dropdown

3. Issuers will then see the AWS Support Center and must click the ***Open a new case*** button.

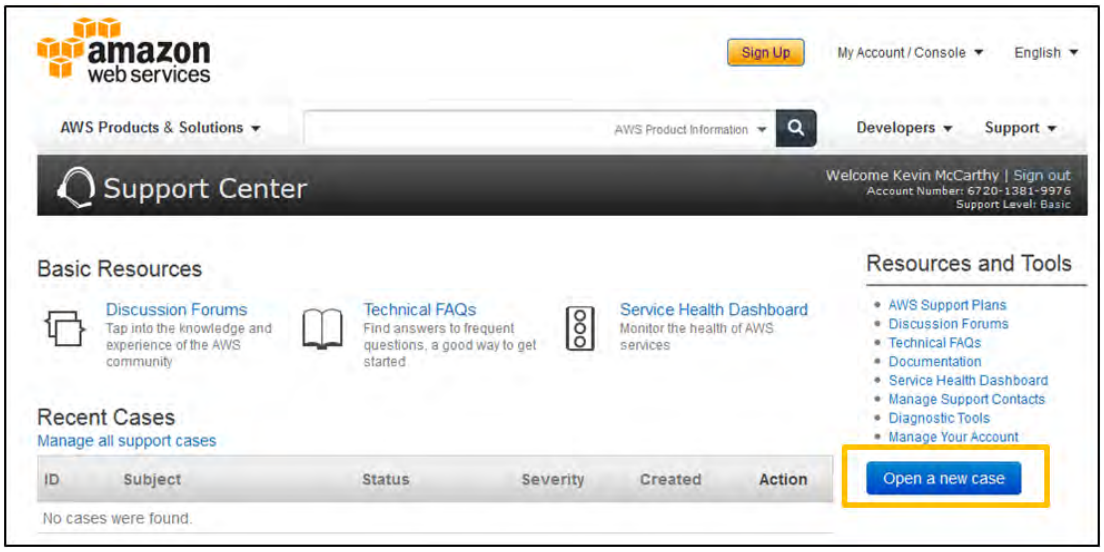


Figure 15 – AWS Support Center

4. Issuers will then view the "Open a new case" screen and should select the ***Service Limit Increase*** option for "Regarding."

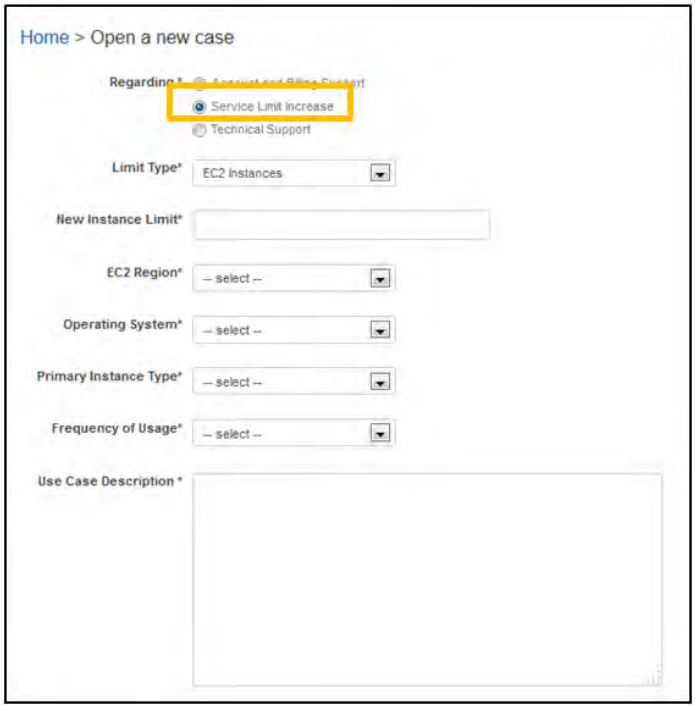


Figure 16 – "Open a new case" screen

5. Issuers should then do the following to complete the **Open a new case** form:
    a. Click on the **Limit Type dropdown** and select ***EC2 Instances***
    b. Enter ***10*** for **New Instance Limit**
    c. Click on the **EC2 Region** dropdown and select the AWS geographic location:
        i. ***us-east-1 / US Standard (Virginia)***
        ii. ***us-west-1 (Northern California)***
        iii. ***us-west-2 (Oregon)***
    d. Select ***Linux/OpenSolaris*** from the **Operating System** dropdown
    e. Click on the **Primary Instance Type** dropdown and select one of the following three choices:
        i. ***c3.xlarge (Equivalent to small on the Server Size Estimation Table and Provisioning Template)***
        ii. ***c3.2xlarge (Equivalent to medium on the Server Size Estimation Table and Provisioning Template)***
        iii. ***c3.4xlarge (Equivalent to large on the Server Size Estimation Table and Provisioning Template)***

Table 1: Server Size Estimation

Primary Instance Type	Size	Number of Enrollees	Claims Processing Throughput per Hour
c3.xlarge	Small	1,000,000	500,000
c3.2xlarge	Medium	5,000,000	1,000,000
c3.4xlarge	Large	20,000,000	2,000,000

    f. Click on the **Frequency of Usage** dropdown and select ***Always On***
    g. Enter "***Requesting EC2 service limit increase***" into the **Use Case Description** textbox
    h. Fill out Contact Information
    i. Click on **Web.**
    j. Click on either ***Web*** or ***Phone*** for Contact Method.
        i. The limit can potentially be increased in less than 30 minutes if you select the call option whereas the web option may take longer.

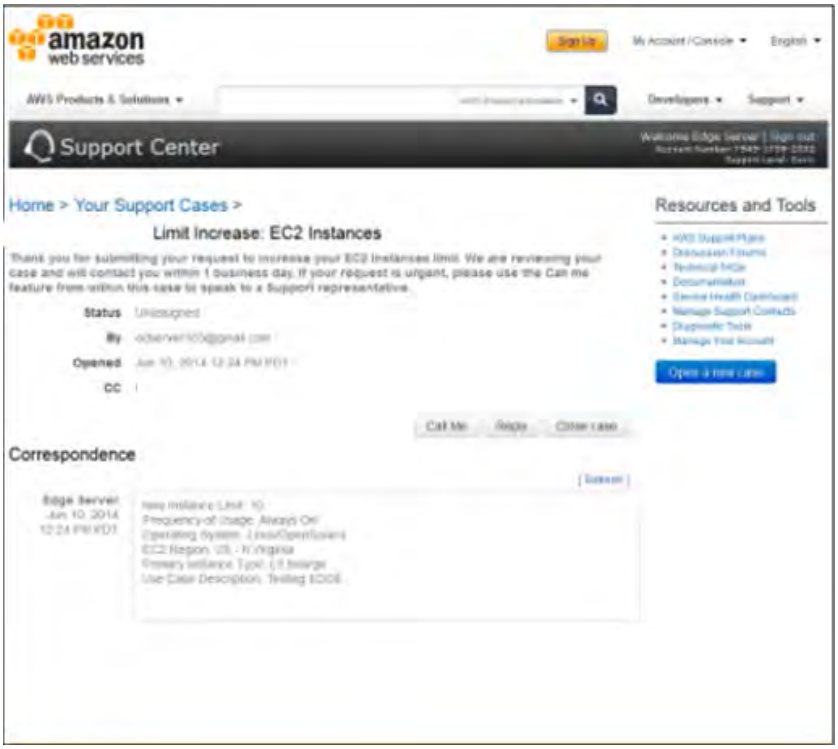


Figure 17 – AWS Service Limit Request - Call Me or Web Choice

k. Issuers should wait until AWS increases the service increase before proceeding to the next section of the Job Aid. AWS will send an email notification once the service increase is complete. The typical turnaround time for this process is 48 hours.

This completes AWS Set-Up Job Aid.