Centers for Medicare & Medicaid Services

EDGE Server Job Aid
Requesting an AWS EDGE Instance

Version 1.0
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Step 2

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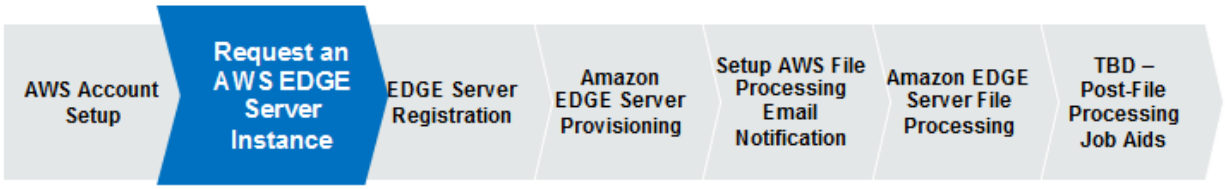
1. Introduction

This document provides an overview of the steps that Amazon EDGE server issuers must take to request an AWS EDGE instance as part of establishing an Amazon EDGE server. The steps provided in this job aid should be performed following set up of an AWS account, but prior to registering their Amazon EDGE server with CMS through the EDGE Registration site.

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. Requesting an AWS EDGE Instance from CMS

Pre-requisite: Issuers must have completed the AWS account set-up described in the EDGE Server AWS Account Registration Job Aid, including Requesting a Service Limit Increase, before requesting an AWS instance from CMS.

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

Locate Account Number

Issuers must first locate their AWS Account Number.

1. Issuers should first click on the **User Name Dropdown** in the upper right corner of the screen and choose **My Account**.



Figure 1 – AWS My Account

2. Issuers will then see their Account ID under the Account Settings section at the top of the screen.

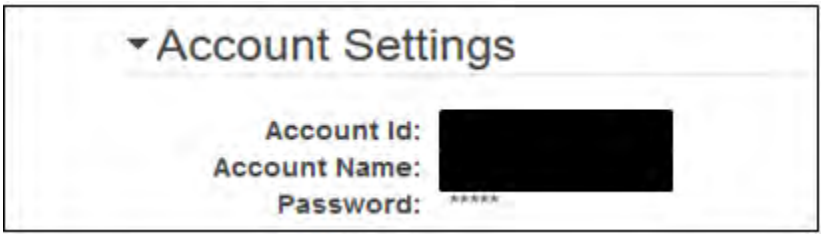


Figure 2 – Account Settings

Issuers now have their Account ID for reference.

<u>Create EDGE Installer Role</u>.

1. Issuers should now click on **Services** in the upper left hand corner of the screen, click on **All AWS Services** and then click on **IAM.**

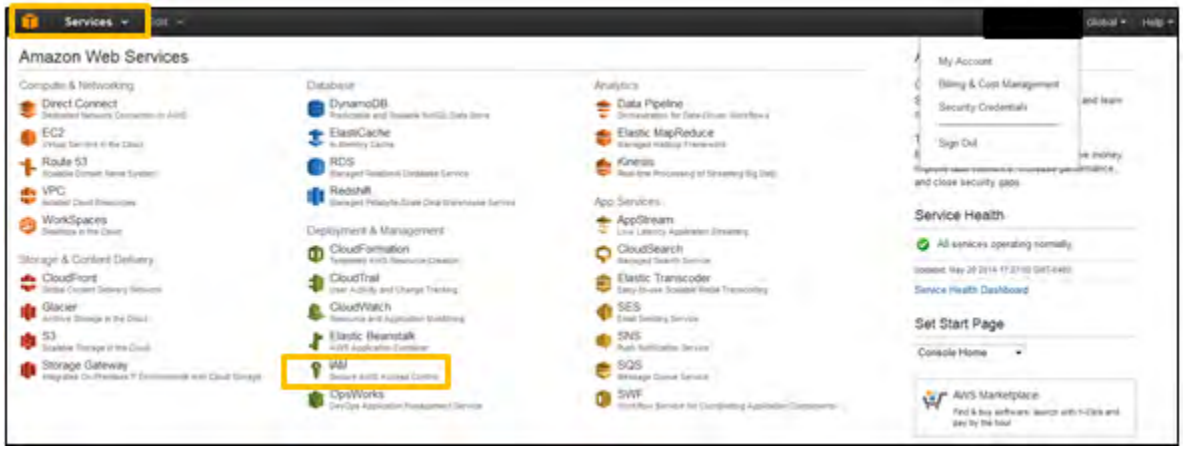


Figure 3 – AWS Homepage with Services Dropdown

2. Select Role from left navigation bar



Figure 4 – Select Roles

3. Click on **Create New Role** on the top



Figure 5 – Create New Role button

4. Enter "**EdgeInstaller"** in the text box and select **Continue** button.



Figure 6 – Configure Role Window

5. In the next window select, **Role for Cross-Account Access** option. **(See Figure 7 below)**

6. Click **Select** button for the option: **Allows IAM users from a 3rd party AWS account to access this account**.

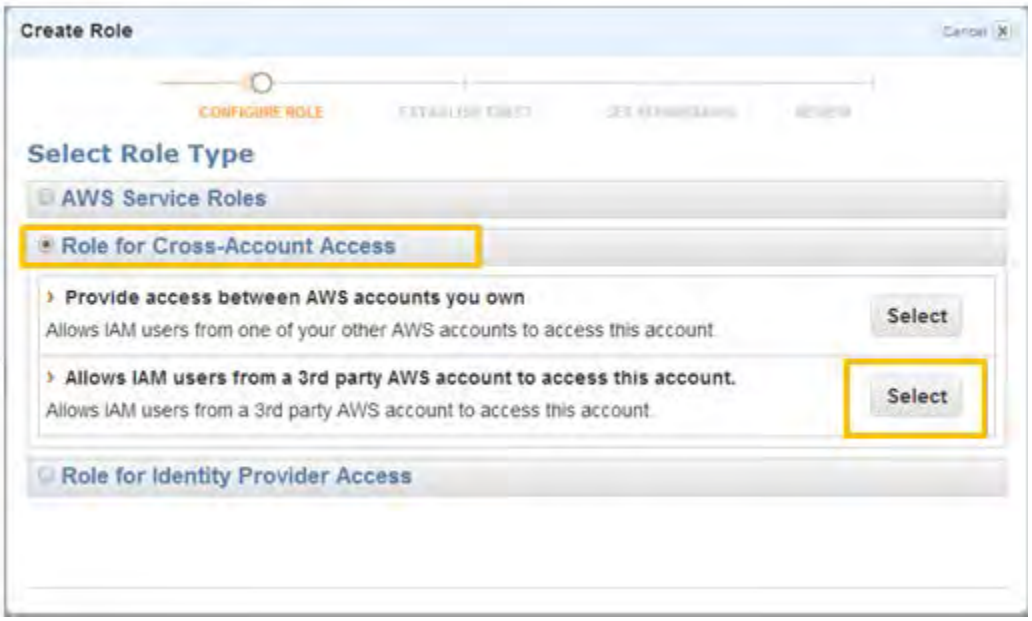


Figure 7 – Select Role Type

7. In the next window enter CMS Account number **494058909136** for **Account ID** text box and issuer account ID (see Step 2) in **External ID**. Click on **Next Step** button.

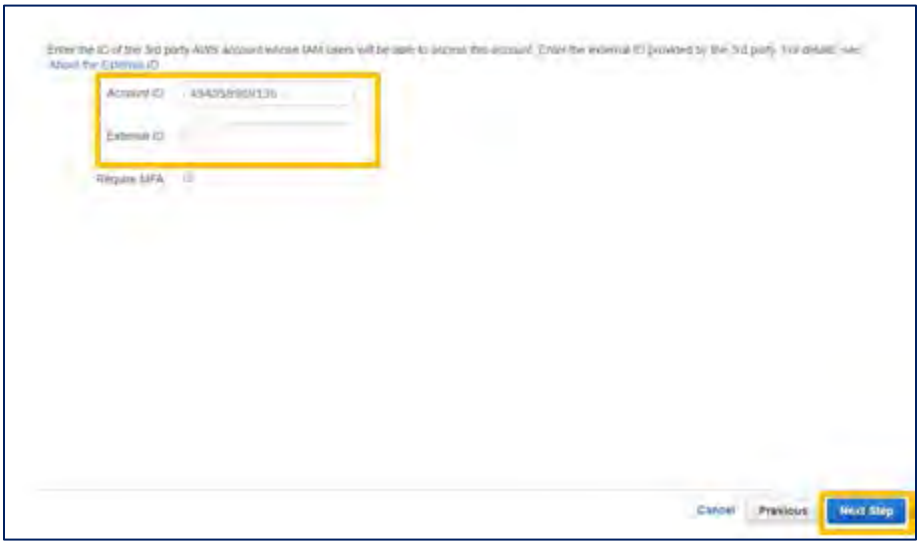


Figure 8 – Enter Account IDs

8. Select **Custom Policy** and click **Select**.

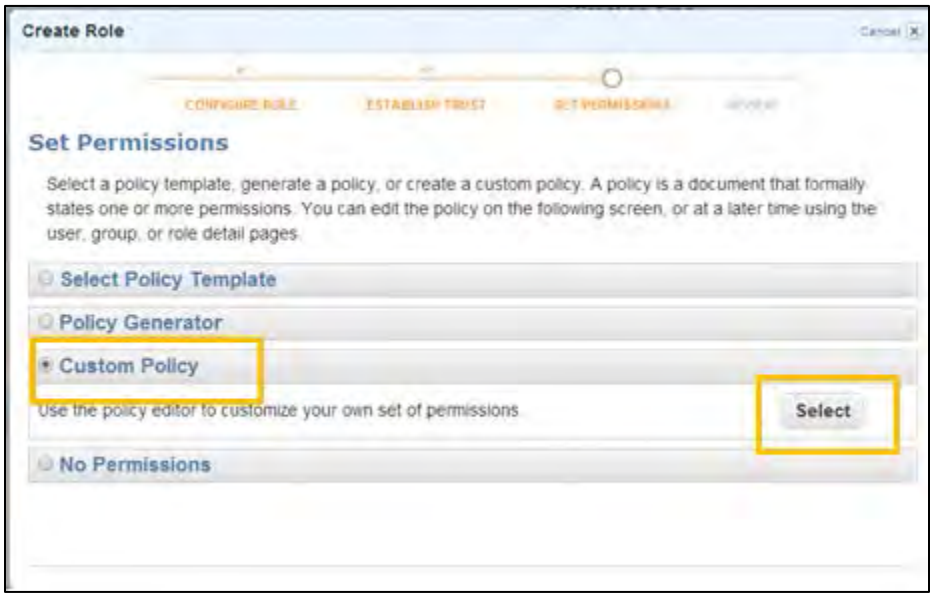


Figure 9 – Set Permissions - Custom Policy

9. Enter "**EdgeInstallerPolicy"** for **Policy Name** field. In the **Policy Document** text box, copy/paste the text inside the EDGE Installer Policy document. Once finished, click **Continue** button.

   IMPORTANT: EDGE Installer Policy Data needed for step 9 above is posted in a separate text (.txt) document accessible in the REGTAP Library. Please click the following link to REGTAP to access the EDGE Installer Policy document: https://www.regtap.info/uploads/library/DDC_EDGES_JBA_InstallerPolicyDoc_5CR_091814.zip.

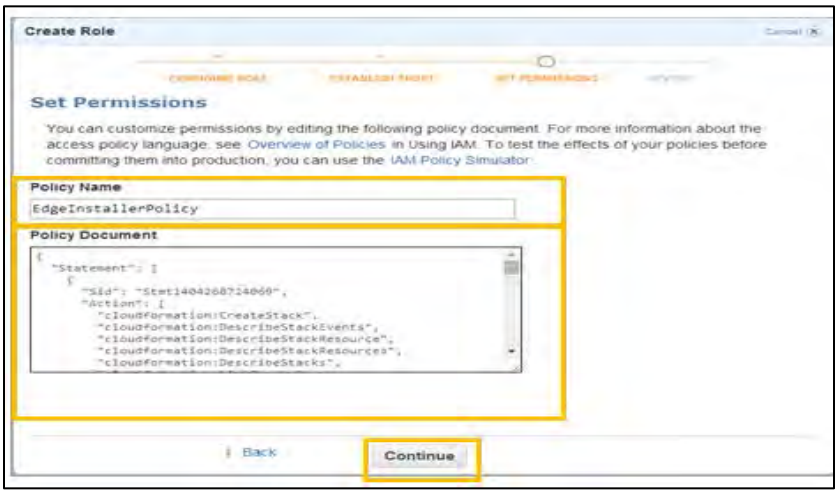


Figure 10 – EdgeInstallerPolicy- Custom Permissions

Review/Edit the role information if necessary. If correct, select **Create Role** button.

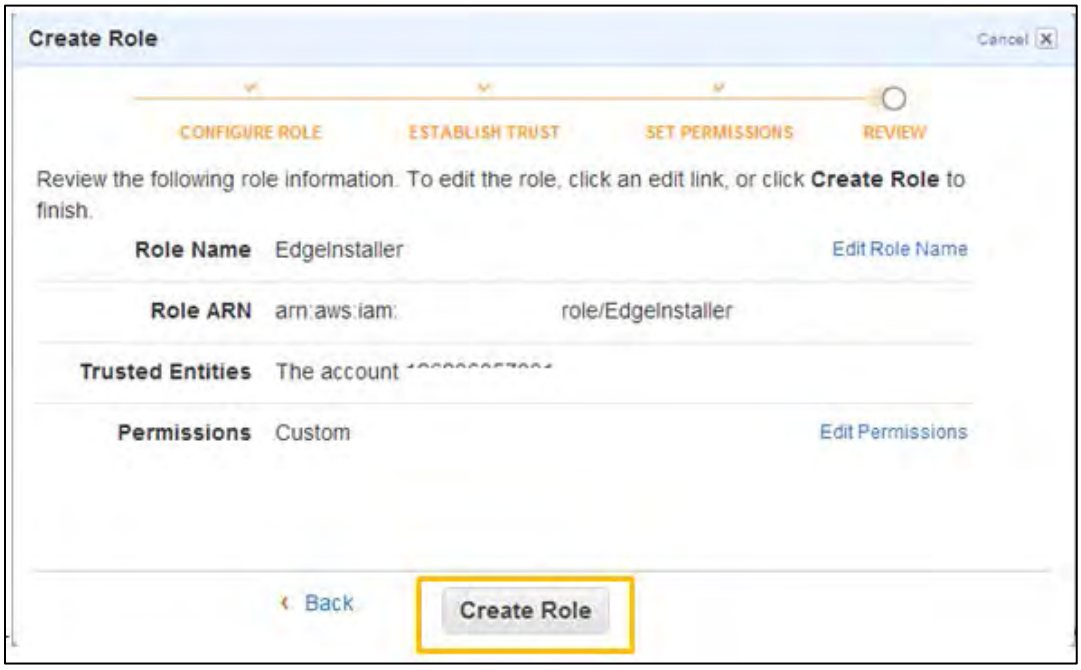


Figure 11 – Final Review Page

Generate Key Pair

Issuers must now create a Key Pair. The Key Pair will be used by the issuer to connect to their AWS EDGE instance. This Key Pair File must be secured and accessible to execute the provisioning process.

PLEASE NOTE: The same Key Pair can be used for multiple EDGE server instances in the same region (instances MUST be in same region). If an EDGE server instance is in a different region from another in the same account, a separate Key Pair is required for each instance.

STOP – IMPORANT: PLEASE READ BELOW

When you have Amazon EC2 key pairs generated by AWS, both the private and public key of the RSA key pair are presented to you when you first create the key pair. You must download and store the private key of the Amazon EC2 key pair in a secure location such as an S3 bucket that has a least privilege policy. Ultimately, issuers should store the key pair in accordance with their organizations security policy. AWS does not store the private key. If the key pair is lost, you will not be able to sign into your EDGE server.

1. Issuers should click on ***Services*** in the upper left hand corner of their home page, click on ***All AWS Services,*** and then click on ***EC2.***

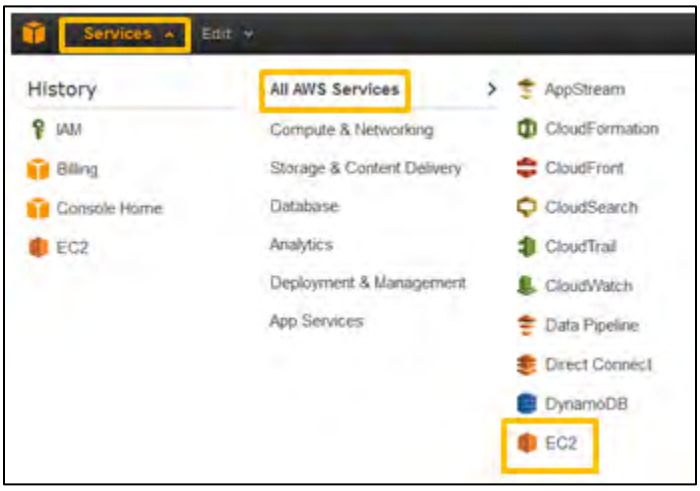


Figure 124 – Services Dropdown with All AWS Services Selected

2. Issuers should then click on **Key Pairs** on the left side of the screen.



Figure 13 – EC2 Dashboard Options

3. Issuers will now click **Create Key Pair** button**.**



Figure 14 – Create Key Pair

4. Issuers will now name their key pair "**EdgeServer"** and then click **Create** button.



Figure 15 – Create Key Pair Name

5. Issuers will see a pop-up window asking them to either **Save the File** or **Open** it**.** Issuers **MUST** choose to save the file at this point in time and should keep the file saved on their computer.

STOP – IMPORANT: PLEASE READ BELOW

When you have Amazon EC2 key pairs generated by AWS, both the private and public key of the RSA key pair are presented to you when you first create the key pair. You must download and store the private key of the Amazon EC2 key pair in a secure location such as an S3 bucket that has a least privilege policy. Ultimately, issuers should store the key pair in accordance with their organizations security policy. AWS does not store the private key. If the key pair is lost, you will not be able to sign into your EDGE server.

6. Issuers have now created a Key Pair Name.

Important: If an Issuer loses the file they will be unable to connect to the server.

This completes Requesting an AWS Instance Job Aid. Issuers can now begin registering their EDGE server with CMS.

See Job Aid – EDGE Server Registration – to begin the registration process.