

Centers for Medicare & Medicaid Services

EDGE Server Job Aid
EDGE Server Registration

Version 2.0

10/30/2014

On-Premise EDGE Server Step 2

Amazon EDGE Server Step 3

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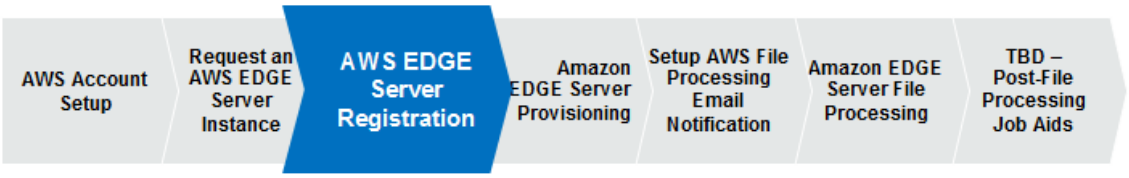
1. Introduction

Please refer to the HIOS Portal User Manual available at: https://www.cms.gov/CCIIO/Resources/Forms-Reports-and-Other-Resources/Downloads/hios-portal-user-manual-10-09-2013.pdf for details about requesting External Data Gathering Environment (EDGE) registration user roles or managing accounts in Health Insurance Oversight System (HIOS).

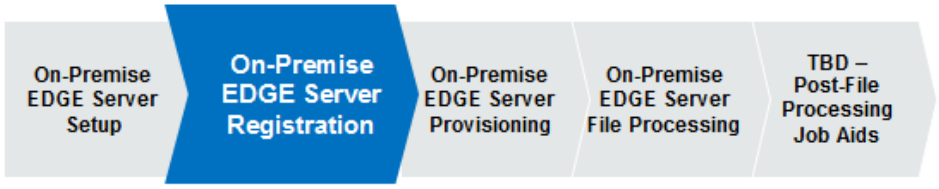
This document details the steps required to access the EDGE server registration site and submit a request for an EDGE server. This job aid is intended for both Amazon EDGE and On-Premise EDGE server issuers and Third Party Administrators (TPAs).

The following process map provides an overview of the steps you need to take to operate your EDGE server and reflects the current step you're executing, depending on whether you're operating an Amazon EDGE or On-Premise EDGE server. Each step below has corresponding training materials (job aids and video demos as applicable) available via the Registration for Technical Assistance Portal (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



On-Premise EDGE Server



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

2. Pre-Requisites for Registration

Please refer to the HIOS Portal User Manual available at: https://www.cms.gov/CCIIO/Resources/Forms-Reports-and-Other-Resources/Downloads/hios-portal-user-manual-10-09-2013.pdf for details about requesting EDGE Registration user roles or managing accounts in HIOS.

Setup Considerations

Use the following browser for optimum usability in the EDGE Server Registration site:

- Internet Explorer, Versions 9, 10 and 11
- Firefox, Version 32.0.2
- Google Chrome, Version 37

All Issuers:

1. All issuers must register for a HIOS Issuer ID
2. Issuers must then request in HIOS an EDGE server registration user role:
    a. Issuer EDGE Registration Request Submitter
        i. This is a user who submits and manages EDGE server requests
    b. Issuer EDGE Registration Request Approver
        i. This is a user who approves EDGE server requests

NOTE: Submitters and Approvers should BOTH be registered for their roles prior to starting registration for an EDGE server.

3. Issuers acting as a TPA must identify themselves in HIOS as an EDGE server TPA by editing their organization in HIOS.

All TPAs:

1. All TPAs must register for an organization HIOS Issuer ID or a Company (FEIN/TIN).
2. TPAs must then request in HIOS an EDGE server user role:
    a. TPA EDGE Registration Submitter
        i. Role that updates EDGE server requests with TPA details.

Amazon EDGE Server issuers/TPAs:

1. Register for an Amazon Web Services (AWS) Account (select support level).
2. Request a Business Associate Agreement (BAA) by sending an email to: aws-edge@amazon.com.
3. Contact Amazon to set up alternate payment options.

On-Premise EDGE Server issuers/TPAs:

1. Obtain and configure On-Premise server:
    a. Choose physical or virtual server
    b. Install and configure software:
        i. Red Hat Enterprise Linux v6.5 (64 bit)
        ii. MySQL version 5.5.37
        iii. Oracle Java version 1.7 u51
    c. Configure firewall rules
    d. Set up file directories

3. Accessing the EDGE Server Registration Site

The following steps will provide issuers and TPAs guidance on how to initially access the EDGE Registration Site. All issuers and TPAs will need to first access the HIOS portal through the CMS Enterprise Portal and then access the EDGE Registration site.

1. First, navigate to the **CMS Enterprise Portal** homepage at portal.cms.gov and then click **Login to CMS Secure Portal** button on the right side of the page.



Figure 1 – CMS Enterprise Portal Homepage

2. On the next page – Read the **Terms and Conditions**, and then click **I Accept** button.

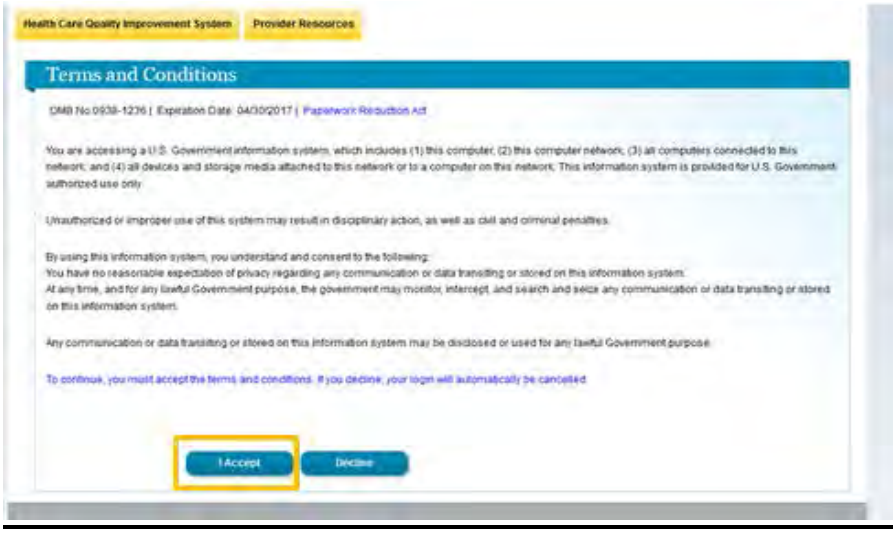


Figure 2 – Terms and Conditions

3. On the CMS Enterprise Portal login screen, enter your **HIOS User ID** and **Password** and then click the **Log In** button.



Figure 3 – Login Screen

4. From the portal homepage, click the **HIOS** button at the top left.

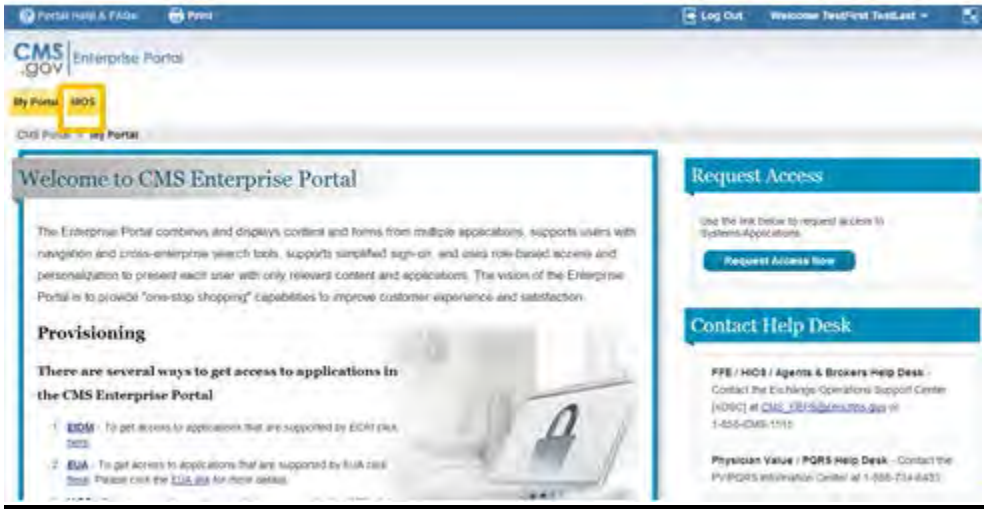


Figure 4 – HIOS Button

5. On the next screen, under the **Plan Management and Market Wide Functions** section, click the **Access Plan Management and Market Wide Functions** link.

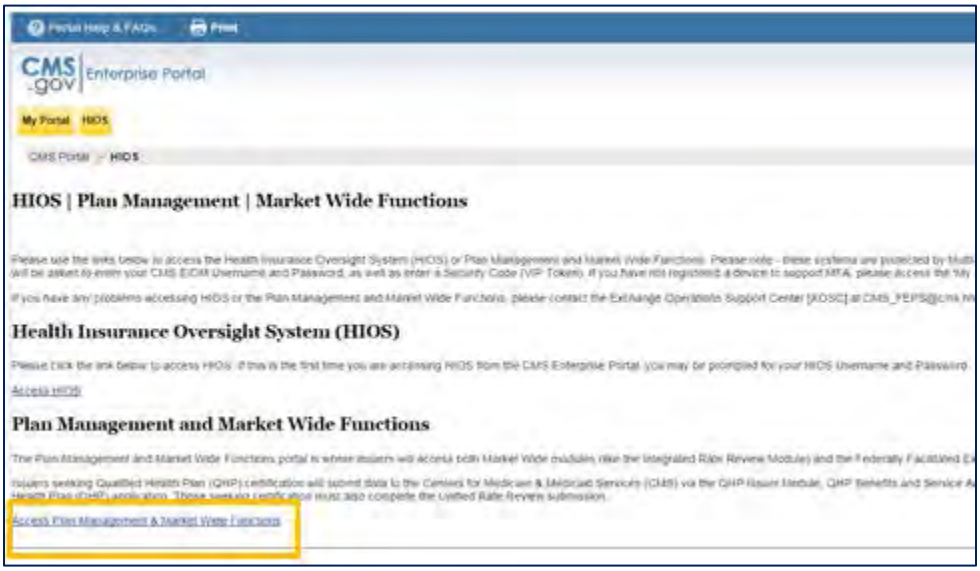


Figure 5 – Access Plan Management & Market Wide Functions link

6. At the HIOS homepage, first click **OK** on the disclaimer message that first appears. Then, click the **EDGE Server Management (ESM)** option from the menu on the left side of the page.

NOTE: All EDGE Registration user roles must be requested and approved before the ESM button is enabled. If roles are not approved, the button will not be available to users.

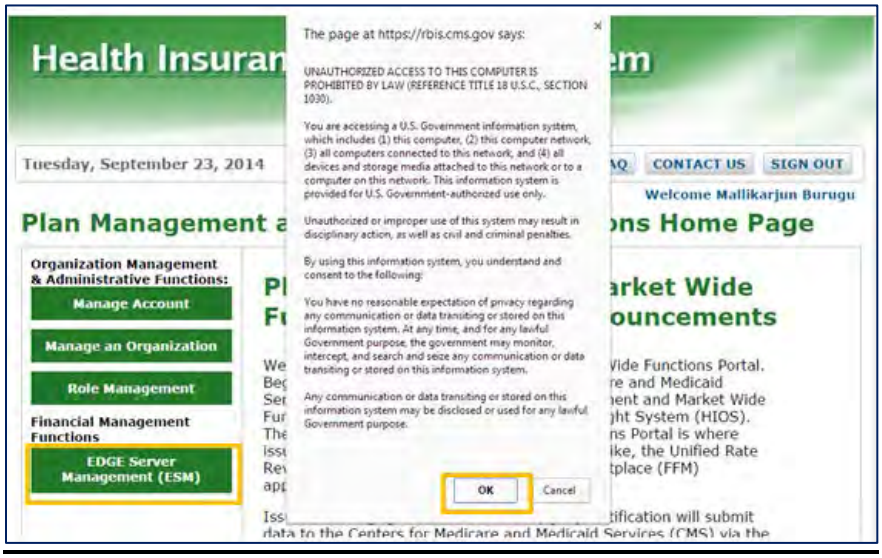


Figure 6 – EDGE Server Management button

7. From the EDGE Server Management tab in HIOS, click the **Access the EDGE Server Management Application** link

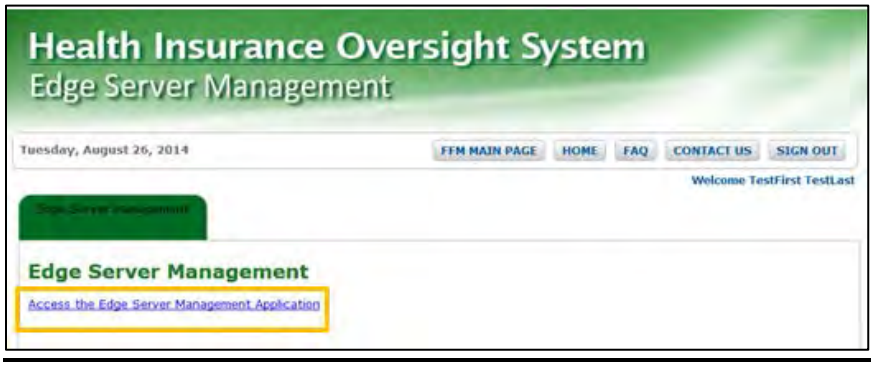


Figure 7 – Access the EDGE Server Management Application link

8. Issuers and TPAs will be taken to their respective homepage when they log into the registration site. The appearance and functionality on the homepage is specific for the role that was previously selected in HIOS. The below example shows the homepage for the **Issuer EDGE Registration Request Submitter**. This job aid contains sections for each role and will show what the homepage looks like for each role.

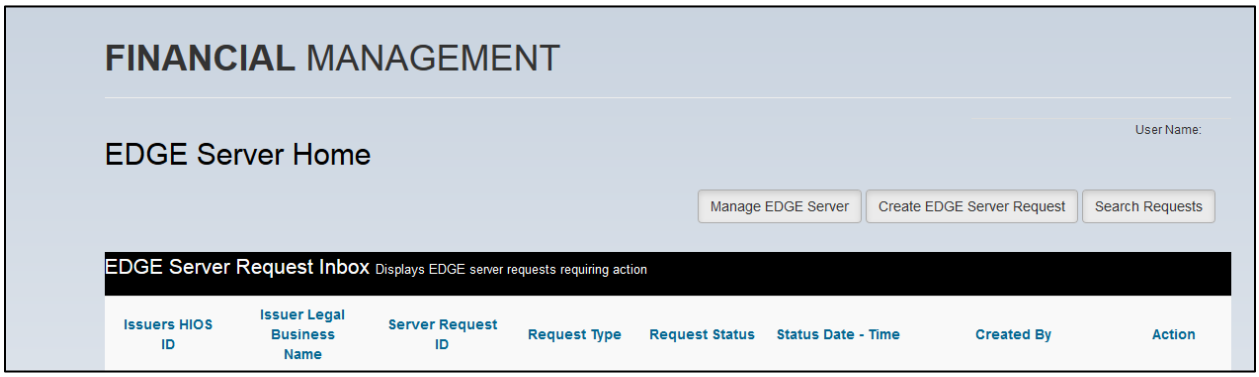


Figure 8 - EDGE Server Registration Home Screen

4. EDGE Server Registration Overview

The steps outlined below for the EDGE server registration process are divided into three (3) scenarios based on the type of access you will have in the site:

1) Issuer EDGE Registration Request Submitter
    a. Create Self-Hosted Server Requests
    b. Create TPA-Hosted Server Requests
2) TPA EDGE Registration Submitter

a. At least one (1) Issuer EDGE Registration Request Submitter and Issuer EDGE Registration Request Approver must have selected a TPA before a TPA EDGE Registration Submitter can enter server details.

3) Issuer EDGE Registration Request Approver
    a. An Issuer EDGE Registration Request Submitter must have submitted a request before the Issuer EDGE Registration Request Approver can take an action.

All issuers and TPAs will need to log into the EDGE Server Registration Site to complete a request for an EDGE server.

There can only be one (1) active request per issuer HIOS ID, as each issuer HIOS ID must have one (1) EDGE server.

Issuers will be required to provide the following information on the request screen:

- Enter details for two (2) EDGE Server Points of Contact (POC) (typically server administrators) for the EDGE server they are registering.
- Indicate whether the server is self-hosted or TPA hosted.
- Signed Data Attestation Agreement.

REMINDER: Uploading a TPA Agreement through the EDGE Server Registration Site

Once **TPAs** have access to the EDGE Server Registration site, please **remember to log in and upload** your signed TPA Agreement through your EDGE server home page. Before issuers can select their TPA for managing their EDGE server, a signed agreement for the corresponding TPA must be uploaded through the EDGE Server Registration site. If the agreement is not uploaded, the TPA name and HIOS ID will not be available for selection when issuers create EDGE server requests. **Note:** ***This document is separate from the data agreement uploaded by the issuer.***

Issuers are encouraged to coordinate with their selected TPA prior to creating an EDGE server request to ensure the necessary signed TPA agreement has been uploaded in the EDGE Server Registration site. This document must be uploaded by the TPA in order for issuers to select them when creating an EDGE server request.

5. Issuer EDGE Registration Request Submitter

5.1. Create a New EDGE Server Request – SELF-HOSTED

The following steps provide Issuer EDGE Registration Request Submitters guidance on how to submit an EDGE server request for a server that will be self-hosted.

1. From the EDGE Registration home screen, the Issuer EDGE Registration Request Submitter will click **Create Edge Server Request** button in top right corner to create a new request.



Figure 9 - Create Edge Server Request Button

NOTE: Any new request will be rejected if there is an existing active request for the same HIOS Issuer ID. The registration site allows only one (1) active server request for each HIOS Issuer ID.

Issuer EDGE Registration Request Submitter will select their **HIOS Issuer ID** from the **Issuer-ID Name** dropdown menu and then enter their EDGE server point of contact information.

- **a.** Two (2) POCs are required.
- **b.** Up to four (4) may be added.

NOTE: If more than two (2) POCs are needed, click the **Additional POCs** link at the bottom to open additional set of POC information fields.

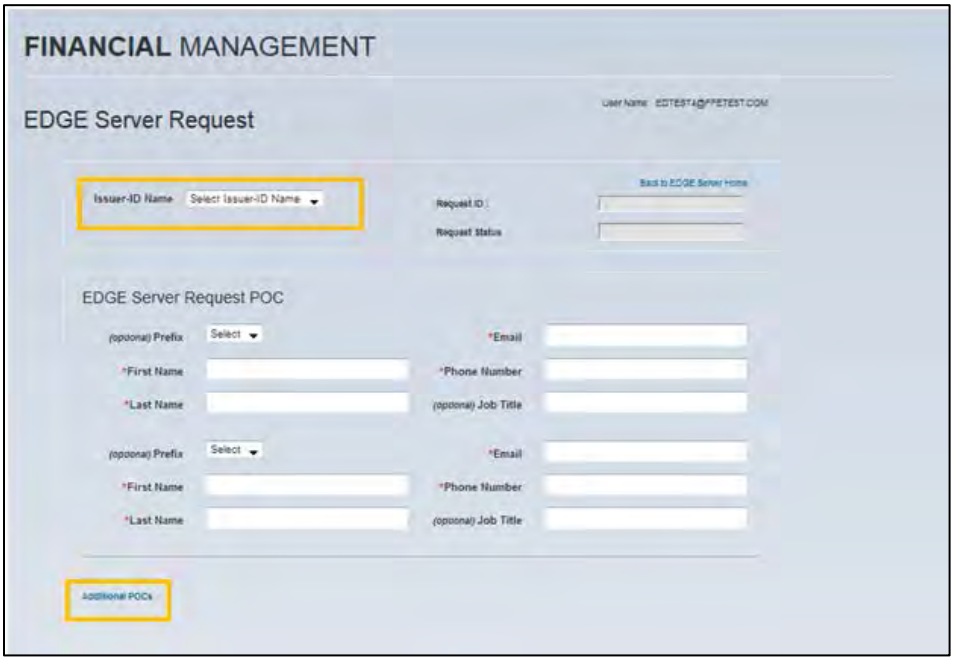


Figure 10 - EDGE Server Request POC page

2. Issuer EDGE Registration Request Submitter will select that they are operating a **Self-Hosted** EDGE server by leaving the **TPA information** section blank. For Issuer EDGE Registration Request Submitters who will be self-hosting an EDGE server, the Issuer EDGE Registration Request Submitter should select the **No** button in the TPA information section.
    a. Note: When selecting **No**, the select TPA drop down box will be disabled.
    b. TPA POC will also be disabled.



Figure 11 - TPA Information

3. In the EDGE Server Detail section, Issuer EDGE Registration Request Submitter will select either **AWS** or **On Premise** for their server type from the **Select Server Type** dropdown menu



Figure 12 – Select Server Type

4. Issuer EDGE Registration Request Submitter must enter a name for their EDGE server in the **EDGE Server Name** field. There is no specific guidance on what to name your server.



Figure 13 – EDGE Server Name

Please NOTE: For entering EDGE server details, see the following steps:

- **For On-Premise, go to Step 5 below.**
- **For AWS, go to Step 6 below.**

5. Issuer EDGE Registration Request Submitters setting up an On-Premise EDGE server do not need to enter any additional information. Once you select **On Premise** for server type and enter a server name, the **AWS Details** fields will be disabled.

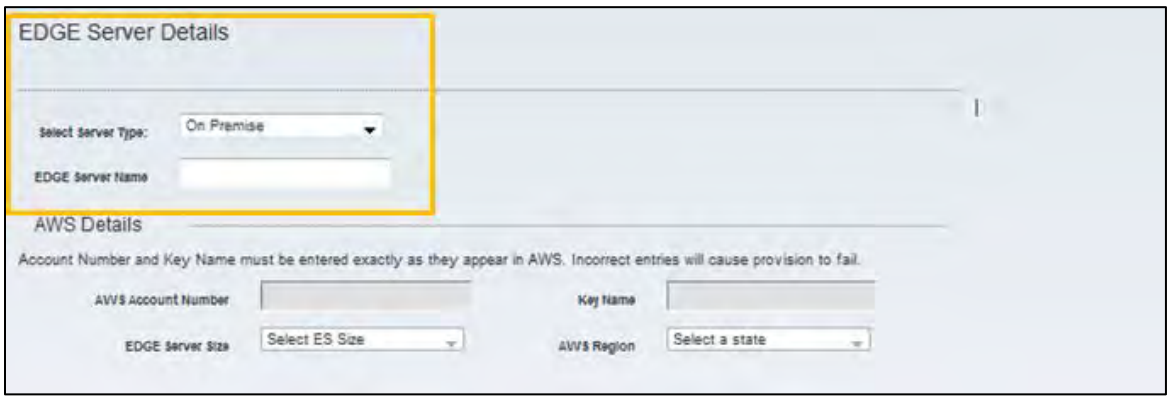


Figure 14 – On-Premise Server Details

6. Issuer EDGE Registration Request Submitters setting up an Amazon EDGE server will need to add the following additional AWS specific information:

   - **AWS Account Number** – This is your Account number provided by AWS. Please refer to the AWS Account Registration Job Aid to find your account number if you don't already have it. Please NOTE: This is YOUR own Account Number and not the one fro CMS.
   - **Key Name** – The name of the SSH key pair that is associated with the issuer's AWS account that will be used to connect to the provisioned EDGE server instance. The Key Pair Name was created when executing the Request an AWS Instance Job Aid. You should have this Key Pair file and name saved to your computer.
   - **AWS Region** – The region in which the EDGE server will reside are:
     - **Virginia**
     - **Oregon**
     - **California**

It is suggested that issuers select the region closest to their location.

- **EDGE Server size** – The size of the EDGE server. This defines the computing power of the provisioned instance.
    - **Small**
    - **Medium**
    - **Large**

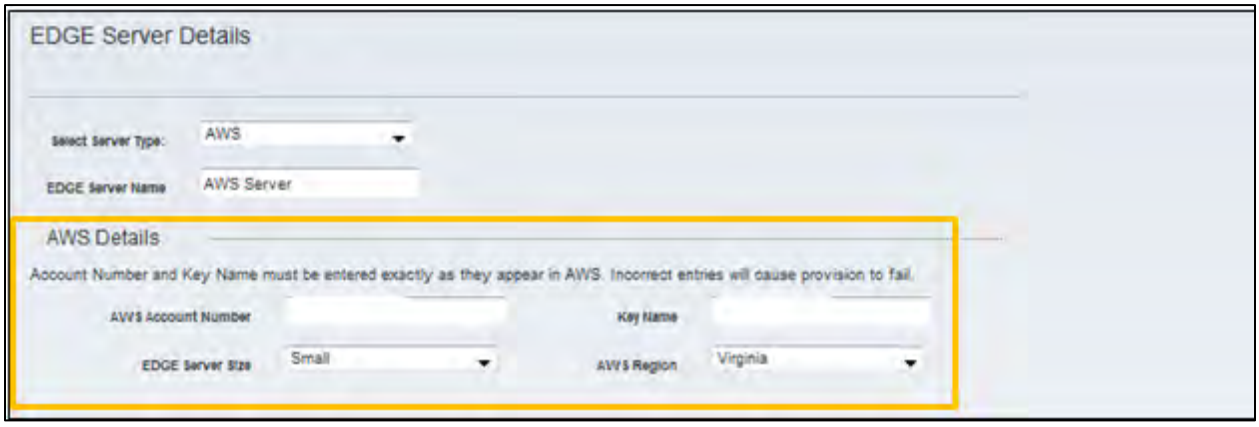


Figure 15 - AWS Details

7. After entering all EDGE Server details, Issuer EDGE Registration Request Submitter will need to upload the **Issuer Attestation Agreement** for the request. This agreement must be uploaded for every EDGE Server Request submitted.
    a. First, download the **Agreement** template by selecting the **Download Attestation Template** button.



Figure 16 – Download Attestation Agreement Template

NOTE: A pop-up window will appear asking to download a PDF document. Download the template, review and sign the agreement and save the document for uploading.

b. Before uploading the **Issuer Attestation Agreement,** Issuer EDGE Registration Request Submitters will need to click the **Save** button to save the current request. Prior to saving, the **Upload Attestation** button will be disabled.



Figure 17 – Save Request

c. After saving, scroll down to the bottom of the request screen and click the **Upload Attestation** button.



Figure 18 – Upload Attestation Agreement

d. In the Upload window, click **Choose File** and select the saved and signed agreement. Once selected, click **Upload Attestation** button.

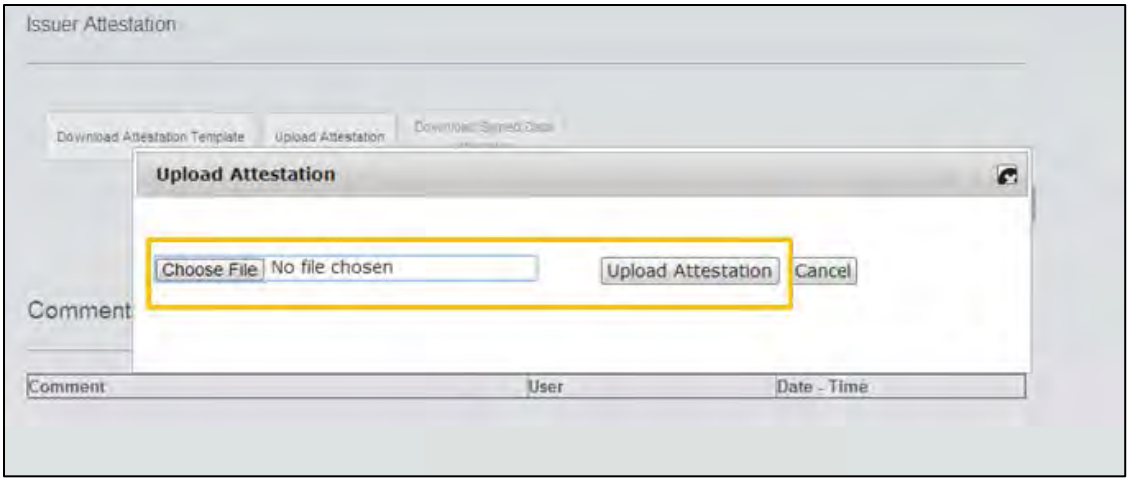


Figure 19 – Attach and Upload Attestation Agreement

e. Once uploaded, Issuer EDGE Registration Request Submitter will see the message "**Successfully uploaded the file".**



Figure 20 – Successfully Uploaded the File message

8. After uploading the agreement, the request is ready to submit. Click the **Submit Request** button. At this point, the request cannot be updated by the Issuer EDGE Registration Request Submitter.



Figure 21 - Submit Request

9. Once submitted, Issuer EDGE Registration Request Submitters will be taken back to their homepage. The request is now sent to the Issuer EDGE Registration Request Approver for approval. Issuer EDGE Registration Request Submitters can track the status of their request using the **Search Requests** function. Refer below to the **Track Request Status** section (Section 5.4) for how to search for requests.



Figure 22 – Homepage

5.2. Create a New EDGE Server Request – TPA-HOSTED

The following steps provide Issuer EDGE Registration Request Submitters guidance on how to submit an EDGE Server request for a server that will be hosted by a TPA. Issuer EDGE Registration Request Submitters will need to initiate these requests and have them approved before the TPA can enter the server details.

NOTE: All TPAs should be registered in HIOS before Issuer EDGE Registration Request Submitters begin submitting requests for EDGE servers that will be hosted by a TPA. Only registered TPAs will be available for Issuer EDGE Registration Request Submitters to select when creating the request.

1. From the home screen, Issuer EDGE Registration Request Submitter will click **Create EDGE Server Request** button in top right corner to create a new request.

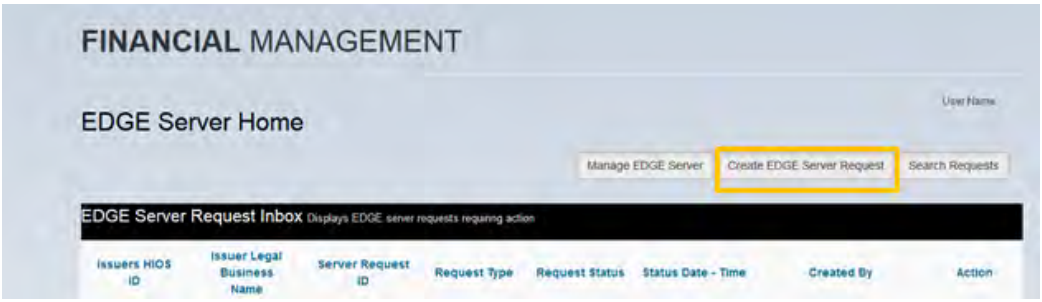


Figure 23 - Create EDGE Server Request Button

NOTE: Any new request will be rejected if there is an existing active request for the same HIOS Issuer ID. The registration site allows only one (1) active server request for each HIOS Issuer ID.

2. Issuer EDGE Registration Request Submitter will select their **HIOS Issuer ID** from the **Issuer-ID Name** dropdown menu and then enter their EDGE server point of contact information.
    a. Two (2) POCs are required.
    b. Up to four (4) may be added.

NOTE: If more than two (2) POCs are needed, click the **Additional POCs** link at the bottom to open additional set of POC information fields.

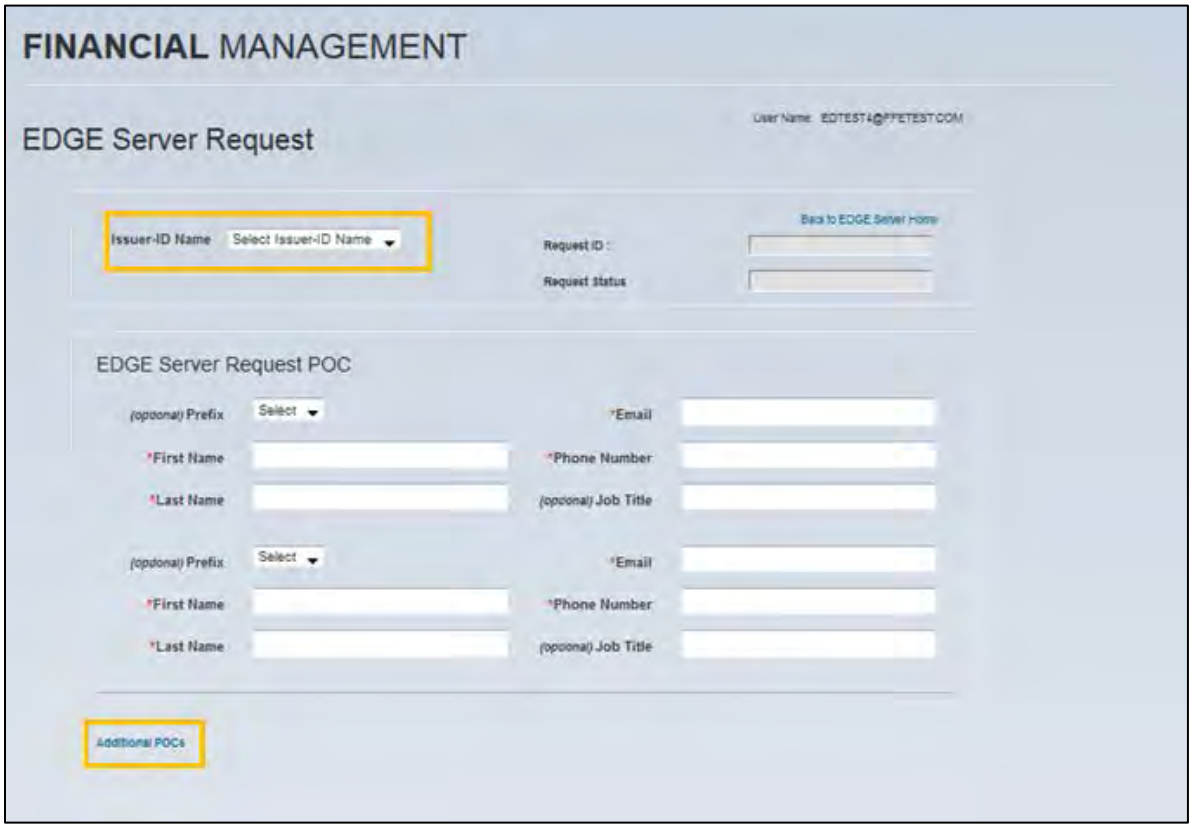


Figure 24 - EDGE Server Request POC page

3. Issuer EDGE Registration Request Submitter will select **YES** in the TPA information section to indicate that they are using a **TPA-hosted** EDGE server and approved TPA from the **Select TPA** drop down menu. The Issuer then must select an approved TPA from the dropdown.



Figure 25 – Select TPA

NOTE: TPA drop down menu is only populated with valid TPAs (registered in HIOS) and is sorted by name and HIOS ID. If a TPA is not listed the issuer should first contact the TPA to confirm they have registered in HIOS and have obtained a HIOS ID. If they have not done so, the TPA will not be listed in the drop down menu.

NOTE: Issuer EDGE Registration Request Submitters who select a TPA Hosted EDGE server will not be able to populate the EDGE server details section. The section must be completed by the TPA after the Issuer EDGE Registration Request Approver has confirmed the request.

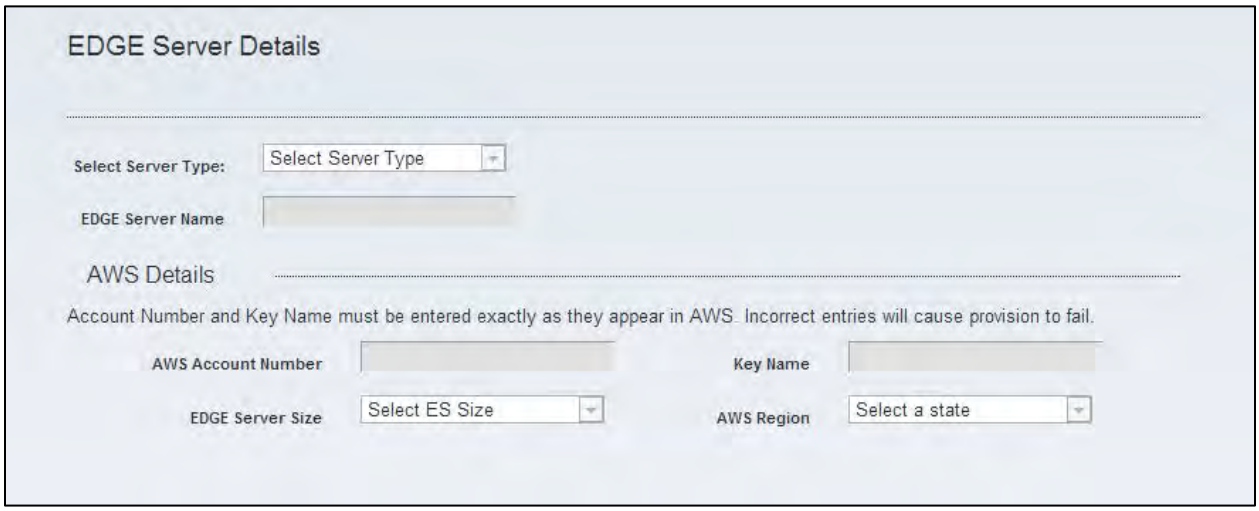


Figure 26 – EDGE Server Details

Issuer EDGE Registration Request Submitters will now submit their request for approval. The specific EDGE Server details will be entered by the requested TPA once approved and the EDGE Server Detail fields will be disabled for the Issuer EDGE Registration Request Submitter.

4. After indicating the EDGE server will be TPA hosted, the Issuer EDGE Registration Request Submitter will need to upload their **Issuer Attestation Agreement** for the request.
    a. First, they must download the template by selecting the **Download Attestation Template** button

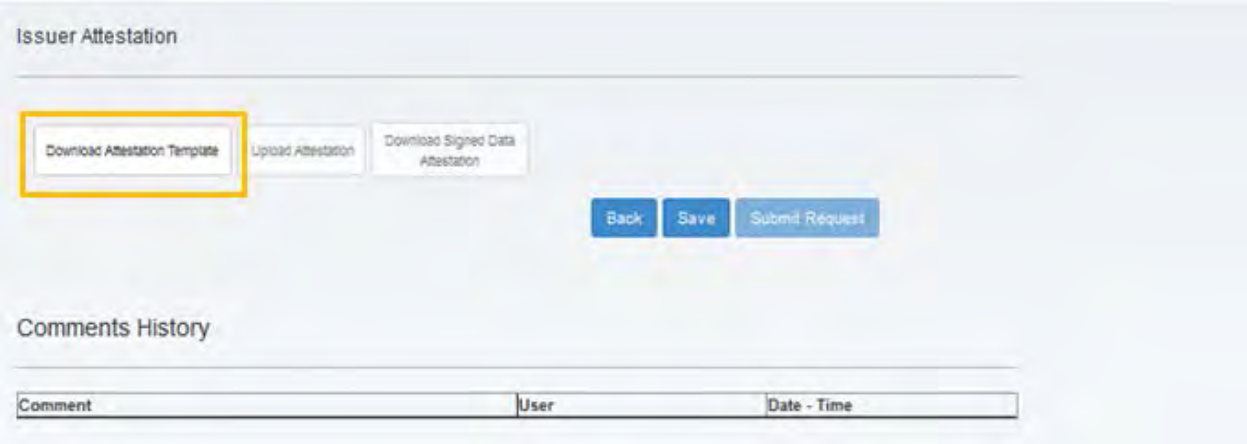


Figure 27 – Download Attestation Agreement Template

NOTE: A pop-up window will appear asking to download a PDF document. Download the template, review and sign the agreement and save the document for uploading.

b. Before uploading the **Issuer Attestation Agreement,** Issuer EDGE Registration Request Submitter will need to click the **Save** button to save the current request. Prior to saving, the **Upload Attestation** button will be disabled.

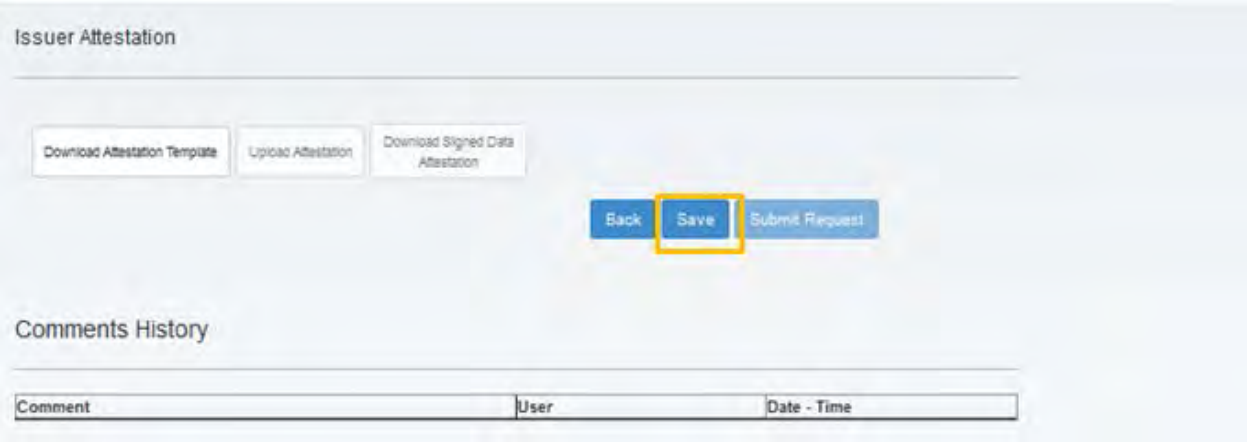


Figure 28 – Save Request

c. After saving, Issuer EDGE Registration Request Submitters must scroll to the bottom of the request screen and click the **Upload Attestation** button



Figure 29 – Upload Attestation Agreement

d. In the Upload window, Issuer EDGE Registration Request Submitter will click **Choose File** and select their saved and signed agreement. Once selected, you will click **Upload Attestation** button.

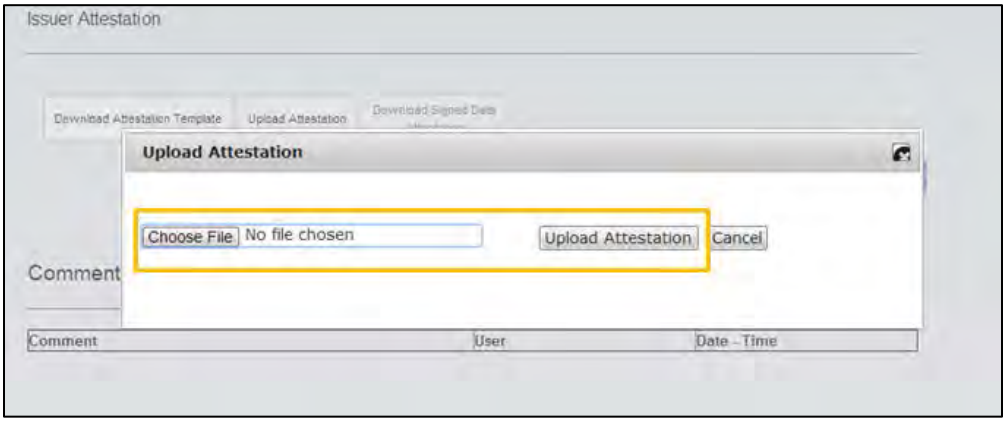


Figure 30 – Attach and Upload Attestation Agreement

e. Once uploaded, a message "**Successfully uploaded the file"** message will appear.



Figure 31 – Successfully Uploaded the File message

5. After uploading the agreement, Issuer EDGE Registration Request Submitters are ready to submit the request for review by the Issuer EDGE Registration Request Approver. Click the **Submit Request** button.



Figure 32 - Submit Request

6. Once submitted, Issuer EDGE Registration Request Submitters will be taken back to their homepage. The request is now sent to the Issuer EDGE Registration Request Approver for approval before being sent to the TPA EDGE Registration Submitter to enter the server details. Issuer EDGE Registration Request Submitters can track the status of their request using the **Search Requests** function. Refer below to the **Track Request Status** section (Section 5.4) for how to search for requests.

5.3. Updating a Rejected Request

If a request is rejected by an Issuer EDGE Registration Request Approver, TPA EDGE Registration Submitter or CMS Approver for any reason, it will return to the Issuer EDGE Registration Request Submitter's inbox. Issuer EDGE Registration Request Submitters will need to open the request, update the request per the comments made by the user rejecting it and then re-submit the request. No notification is sent to the Issuer EDGE Registration Request Submitter. Issuer EDGE Registration Request Submitter should check the status of their request periodically.

1. If a request is rejected, Issuer EDGE Registration Request Submitter will see the rejected request in their inbox with one (1) of the following statuses **(see Figure 35)**:
    a. **Org Rejected** (rejected by the Issuer EDGE Registration Request Approver)
    b. **Host Rejected** (rejected by the TPA EDGE Registration Submitter – TPA-Hosted Server ONLY)
    c. **CMS Rejected** (rejected by CMS Approver)

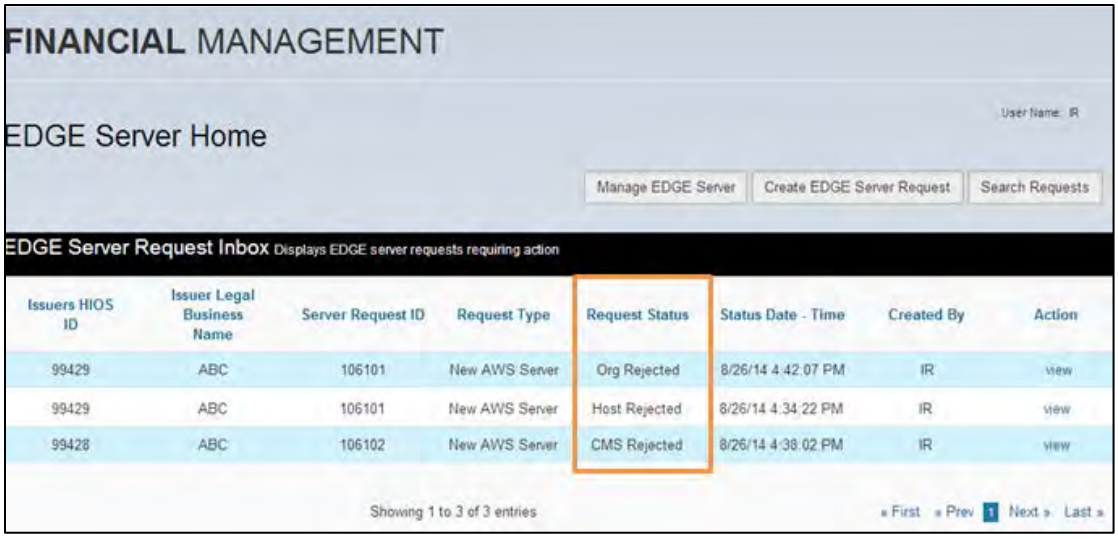


Figure 33 – Rejected Requests in Issuer EDGE Registration Request Submitter's Inbox

2. Issuer EDGE Registration Request Submitter should select **View** next to the request they want to update to open the request.



Figure 34 – Open Request

3. Issuer EDGE Registration Request Submitter will update the request per the rejection comments and re-submit following the standard submission process outlined in the previous steps.

5.4. Track Request Status

Once a request has been submitted, the request will move along one of the following paths:

- **Self-Hosted**

Step	Request Status
1. Request submitted to Issuer Approver	Pending Org Approval
2. Approved by Issuer Approver and sent to CMS Approver	Pending CMS Approval
3. Approved by CMS and provisioning in progress	Pending Provisioning

Table 1 – Self-Hosted Path

- **TPA-Hosted**

Step	Request Status
1. Request submitted to Issuer Approver	Pending Org Approval
2. Approved by Issuer Approver and sent to TPA Submitter to complete	Pending Host Server Details
3. TPA Submitter submits to CMS for approval	Pending CMS Approval
4. Approved by CMS and provisioning in progress	Pending Provisioning

Table 2 – TPA-Hosted Path

In order to track the status of an existing request after it has been submitted by Issuers, EDGE Registration Request Submitters can use the search function on the homepage to search for requests. They can do this to track requests that have been submitted to a TPA EDGE Registration Submitter, Issuer EDGE Registration Request Approver, and CMS Approver or to monitor servers that are going through the provisioning process.

1. From the homepage, the Issuer EDGE Registration Request Submitter will click **Search Requests** button to open the search request screen.



Figure 35 – Search Request button

2. At the EDGE Server Request Search screen, Issuers can select the **Search Field** to search all requests and can specify the **Created Date Range** and then click **Search** button. All applicable results will display.

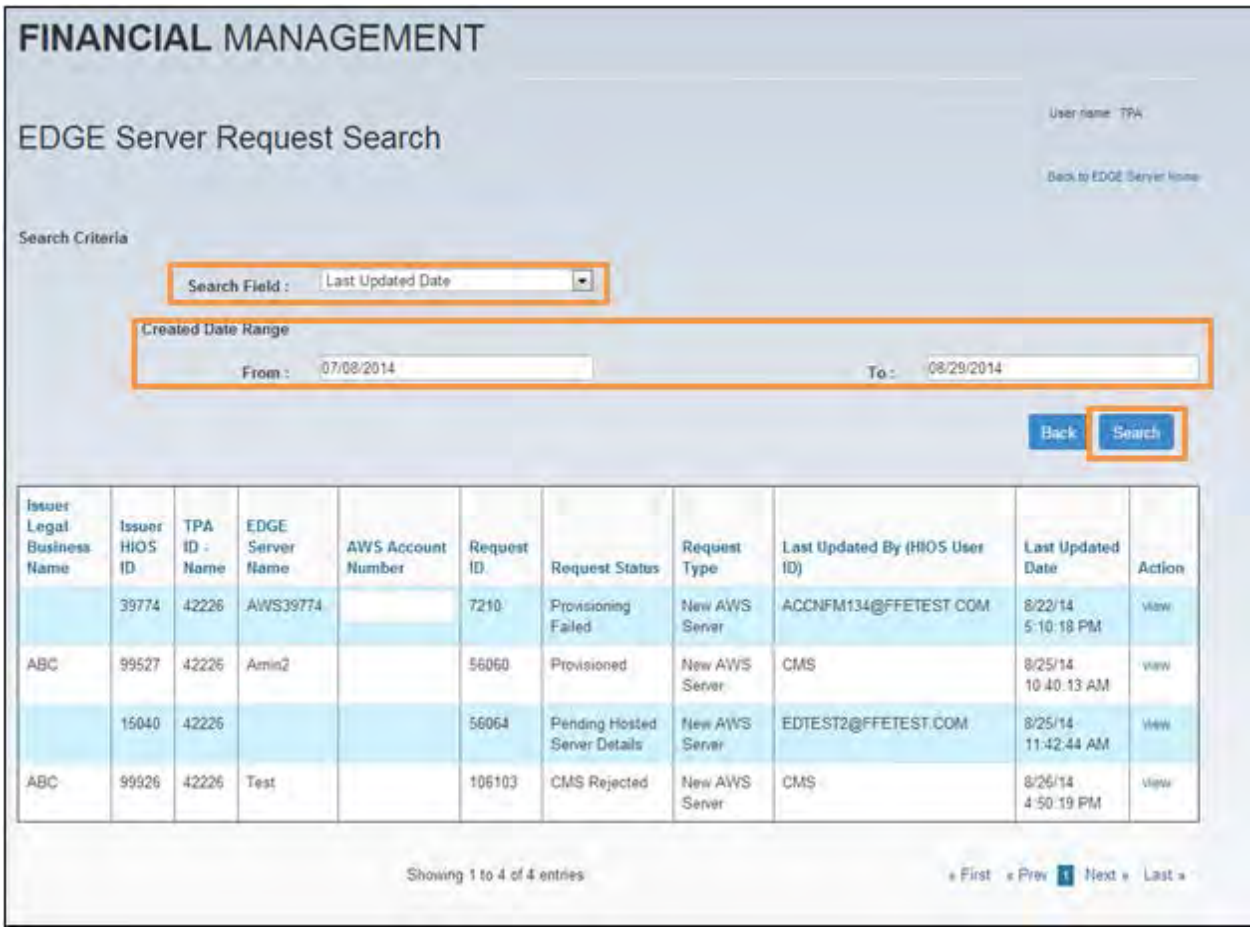


Figure 36 – Search Request Results

Once the request has a status of "Pending Provisioning", refer to the Amazon EDGE or On-Premise EDGE Server Provisioning Job Aid to complete the provisioning process.

6. TPA EDGE Registration Submitter

Once the EDGE server request has been approved by the Issuer EDGE Registration Request Approver, the request will appear in the selected TPA's EDGE server Homepage. There is no notification feature to alert the TPA EDGE Registration Submitters of pending requests. TPA EDGE Registration Submitters should check their EDGE server Homepage regularly. TPA EDGE Registration Submitters will complete the following steps to finish registering the EDGE server.

NOTE: If for any reason the request is invalid or needs to be rejected, TPA EDGE Registration Submitters can select **Reject Hosting Request** button and the request will return to the Issuer EDGE Registration Request Submitter's inbox. When rejecting the request, the TPA will need to enter comments explaining why the request is being rejected.

Requests in the TPA EDGE Registration Submitter's inbox can either be newly submitted requests or previously submitted requests that have been rejected and re-submitted back to them to update

1. From the EDGE server Homepage, TPA EDGE Registration Submitters will see the pending request with a status **Pending Hosted Server Details.**

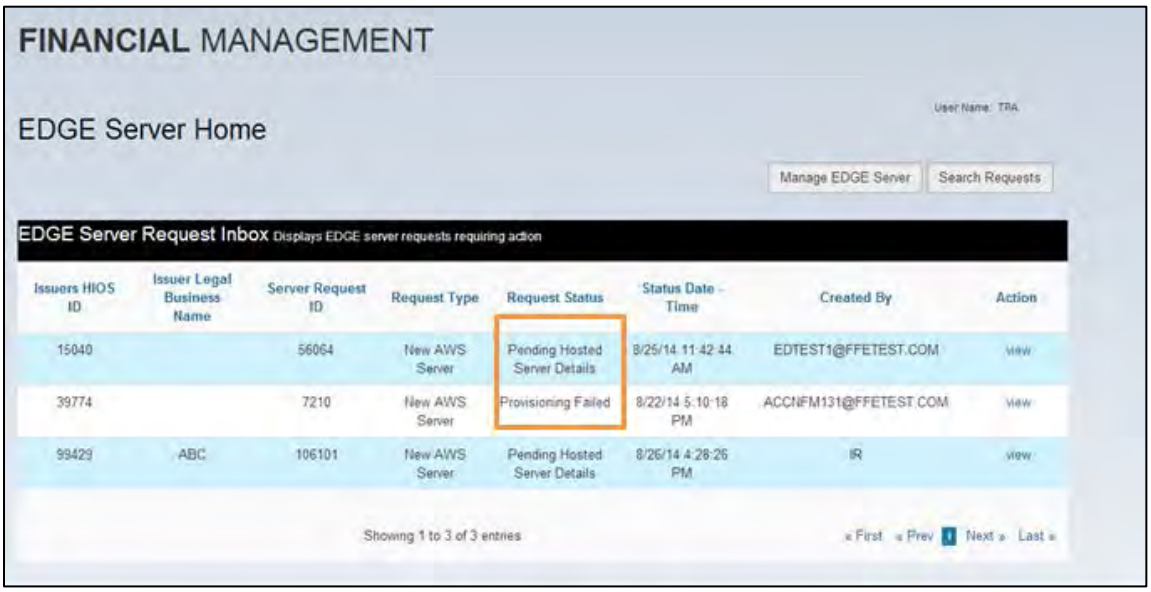


Figure 37 – TPA EDGE Registration Submitter Homepage

2. Before processing requests, TPA EDGE Registration Submitters will need to upload their TPA Attestation Agreement from their homepage.

NOTE: TPA EDGE Registration Submitters will need to upload a TPA Attestation Agreement for every issuer they are hosting.

a. In the lower right corner, under the **Manage TPA Attestation** section, click the **Download TPA Attestation Template** button.



Figure 38 – Download TPA Attestation Agreement Template

b. A pop-up window will appear asking the user to download and save the PDF. Click **Yes** and sign and save the agreement.
c. Next, click the **Upload Signed TPA Attestation** button.

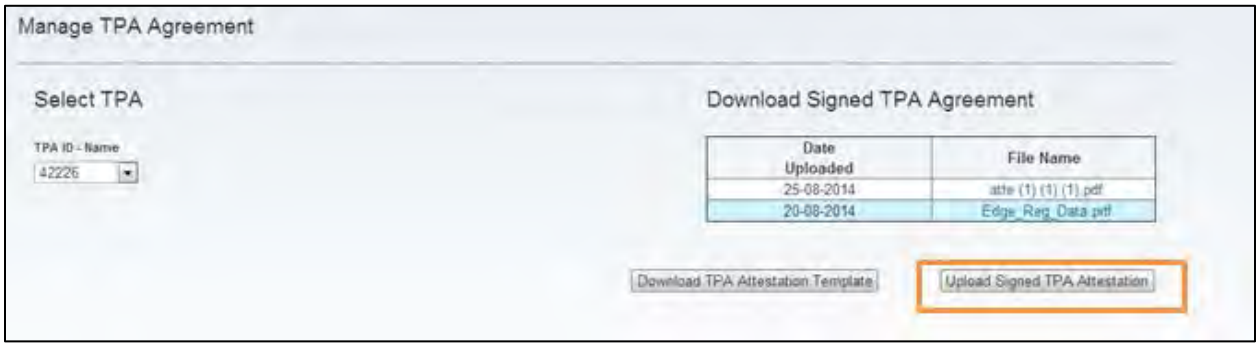


Figure 39 – Upload Signed TPA Attestation Agreement

d. In the upload window, click **Choose File** to select the saved and signed TPA Attestation Agreement form and then click **Upload Attestation** button to attach.

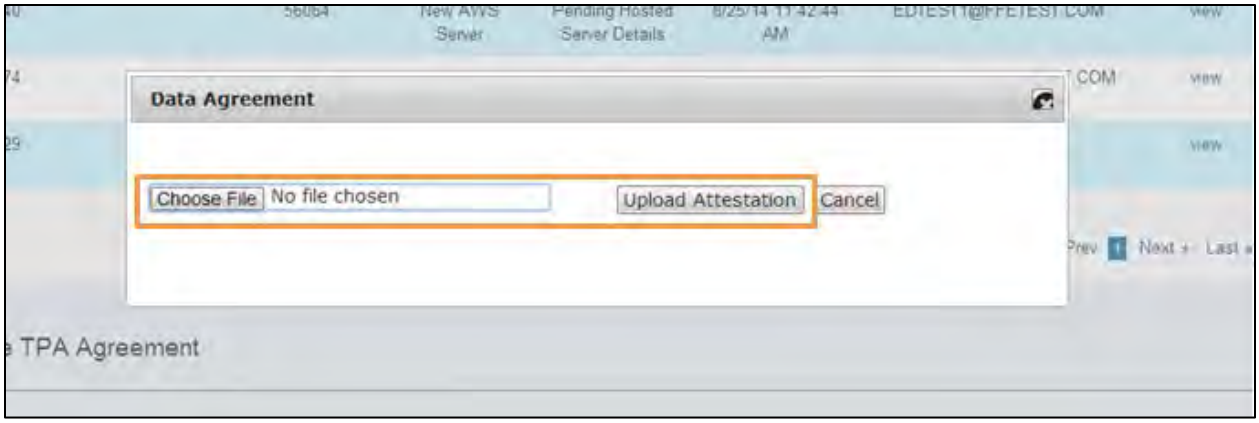


Figure 40 – Upload Attestation Agreement

NOTE: TPA EDGE Registration Submitters will be able to track all their uploaded documents in the **Download Signed TPA Attestation** section at the bottom of the homepage.

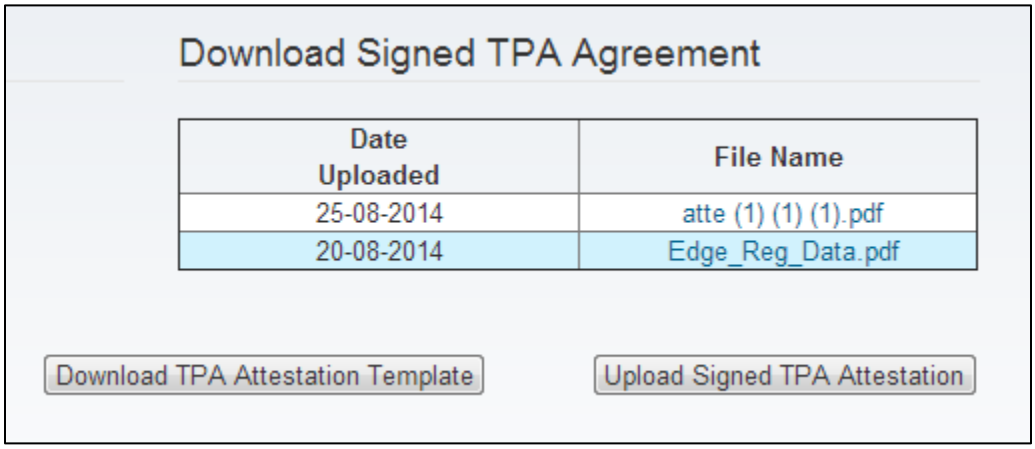


Figure 41 – Uploaded Attestations Agreement

3. Once the agreement has been uploaded, the TPA EDGE Registration Submitter can begin processing a request. The TPA EDGE Registration Submitters will select the **View** from the **Action** column in their inbox for the request they want to process.



Figure 42 – Select to View Request

4. Next, the TPA EDGE Registration Submitters will scroll down to the section EDGE Server Details to enter the server information.

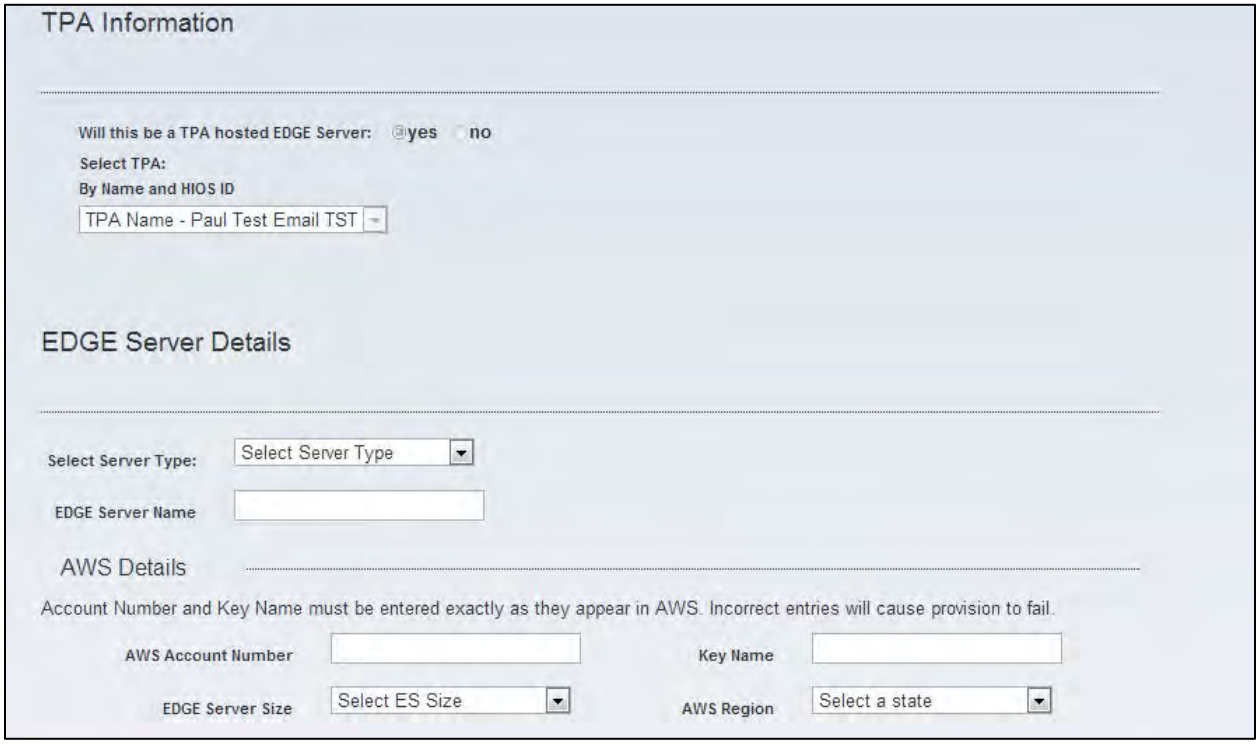


Figure 43 – TPA EDGE Registration Submitters Request

5. TPA EDGE Registration Submitters will select either **AWS** or **On Premise** for their server type.



Figure 44 – Select Server Type

6. TPA EDGE Registration Submitters must enter a name for their EDGE server in the **EDGE Server Name** field. There is no specific guidance or requirement for the EDGE server name.

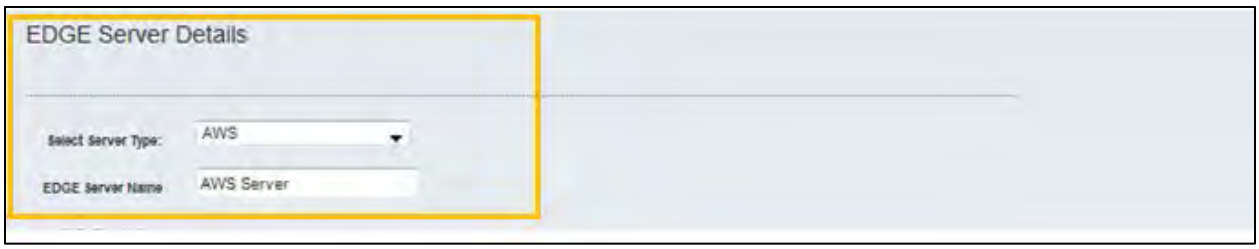


Figure 45 – EDGE Server Name

Please NOTE: For entering EDGE server details, see the following steps:

- **For On-Premise, go to Step 7 below.**
- **For AWS, go to Step 8 below.**

7. **NOTE:** TPA EDGE Registration Submitters setting up an On-Premise EDGE server do not need to enter any additional information.

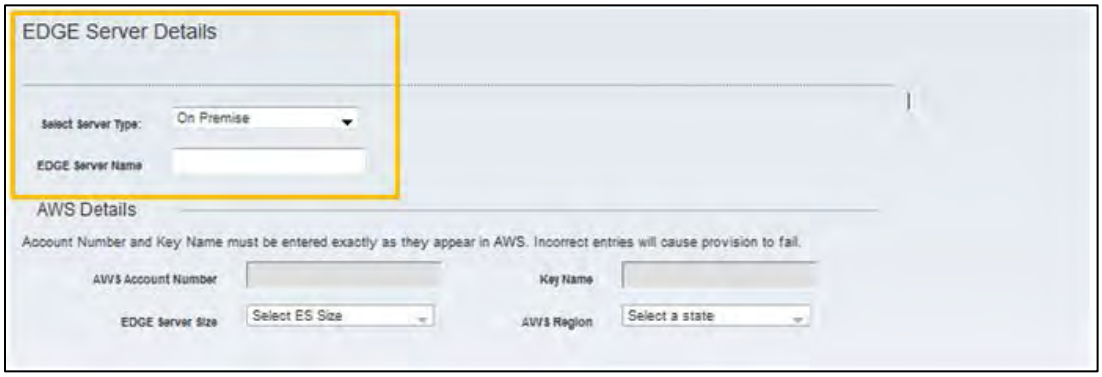


Figure 46 – On-Premise Server Details

8. TPA EDGE Registration Submitters setting up an **Amazon EDGE server** will need to add the following additional AWS specific information:

    - **AWS Account Number** – This is your Account number provided by AWS. Please refer to the AWS Account Registration Job Aid to find this account number if you don't already have it. Please NOTE: This is your own AWS Account Number and not the one for CMS.
    - **Key Name** – The name of the SSH key pair that is associated with the issuer's AWS account that will be used to connect to the provisioned EDGE server instance. The Key Pair Name was created when executing the Request an AWS Instance Job Aid. You should have this Key Pair file and name saved to your computer.
    - **AWS Region** – The region in which the EDGE server will reside are:
        - **Virginia**
        - **Oregon**
        - **California**
    - It is suggested that issuers select the region closest to their location.
    - **EDGE Server size** – The size of the EDGE server. This defines the computing power of the provisioned instance.
        - **Small**
        - **Medium**
        - **Large**

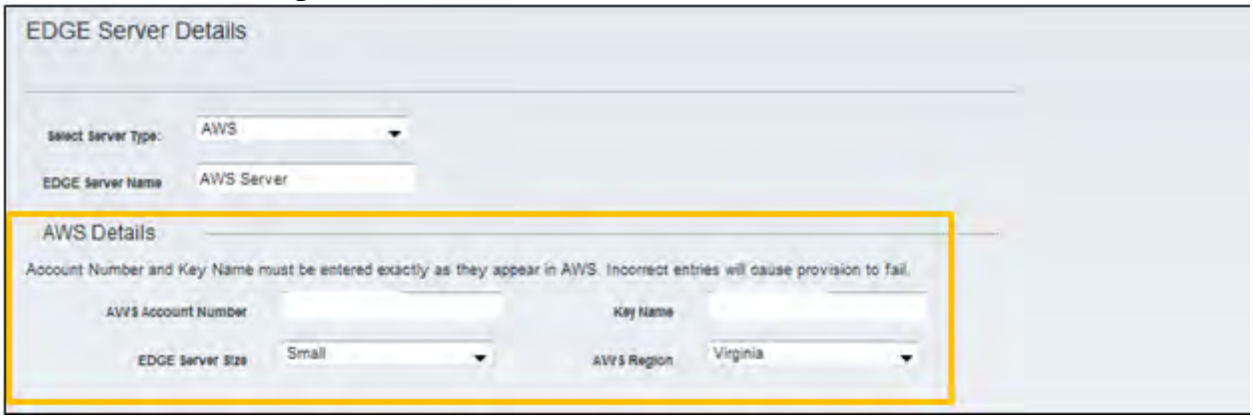


Figure 47 - AWS Details

9. After entering all appropriate EDGE Server details, TPA EDGE Registration Submitters will click **Submit** button to process request.

NOTE: If for any reason the request is invalid or needs to be rejected, TPA EDGE Registration Submitters can select **Reject Hosting Request** button and the request will return to the Issuer EDGE Registration Request Submitter's inbox. When rejecting the request, the TPA EDGE Registration Submitters will need to enter comments explaining why the request is being rejected.



Figure 48 – Submit Button

6.1. Updating a Rejected Request

If a request is rejected for any reason, it will return to the Issuer EDGE Registration Request Submitter's inbox. Issuer EDGE Registration Request Submitters will need to open the request, update the request (if applicable) per the comments made by the user rejecting it and then re-submit to the Issuer EDGE Registration Request Approver. Once approved by the Issuer EDGE Registration Request Approver, the request will be sent to the TPA EDGE Registration Submitter to update any applicable information. If any of the required updates are to be made by the TPA EDGE Registration Submitter, they will need to open those requests, complete the updates and re-submit to CMS for approval.

1. Rejected requests will be re-submitted and go back through the same approval process. Once the Issuer EDGE Registration Request Approver approves the quest, it will return to the TPA EDGE Registration Submitter's inbox with the same status of Pending Host Server Details.

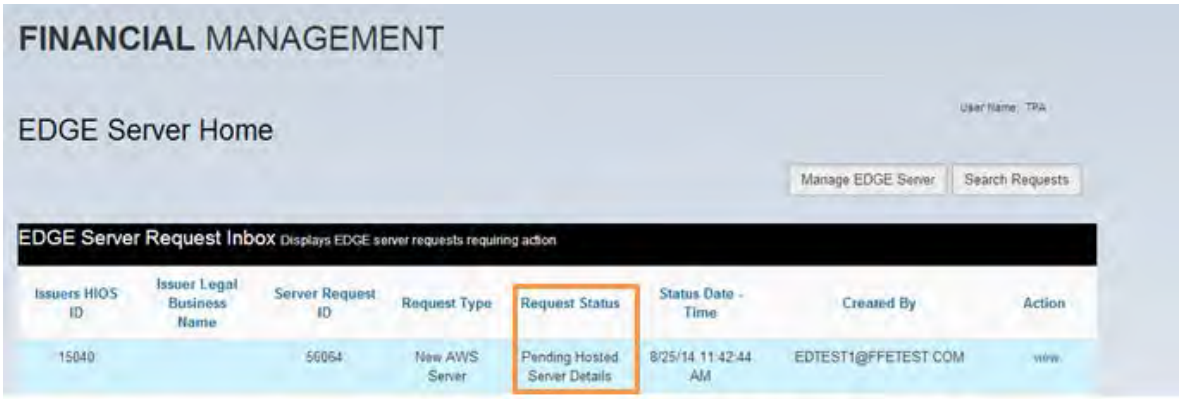


Figure 49 – Rejected Requests in Submitter's Inbox

2. TPAs will select **View** next to the request they want to update to open the request.



Figure 50 – Open Request

3. TPA EDGE Registration Submitters will update the request per the rejection comments and re-submit following the standard submission process outlined in the previous steps.

6.2. Track Request Status

Once a TPA-hosted request has been submitted, the request will move along the following path. TPA EDGE Registration Submitters can track the status of their request using the below details:

- **TPA-Hosted**

Step	Request Status
1. Request submitted to Issuer Approver	Pending Org Approval
2. Approved by Issuer Approver and sent to TPA Submitter to complete	Pending Host Server Details
3. TPA Submitter submits to CMS for approval	Pending CMS Approval
4. Approved by CMS and provisioning in progress	Pending Provisioning

Table 3 – TPA-Hosted Path

In order to track the status of an existing request after it has been submitted, TPA EDGE Registration Submitters can use the search function on the Registration homepage to search for requests. They can do this to track requests that have been: submitted to a CMS Approver, rejected by CMS Approver, or are in the provisioning process.

4. From the Registration homepage, the TPA EDGE Registration Submitter can click **Search Requests** button to open the search request screen.



Figure 51 – Search Request button

5. At the EDGE Server Request Search screen, TPA EDGE Registration Submitters can select the **Search Field** to search all requests by and can specify the **Created Date Range** and then click **Search** button. All applicable results will display.

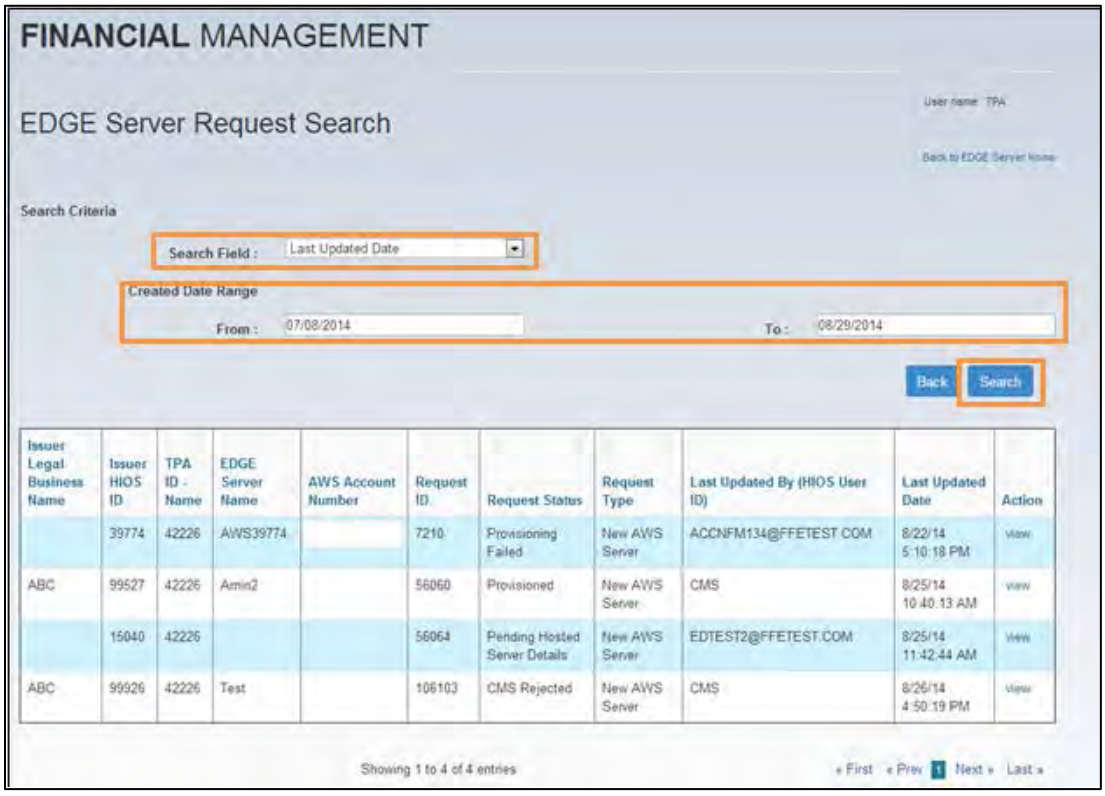


Figure 52 – Search Request Results

Once the request has a status of "Pending Provisioning", refer to the Amazon EDGE or On-Premise EDGE Server Provisioning Job Aid to complete the provisioning process.

7. Issuer EDGE Registration Request Approver

Once an EDGE server request has been submitted by the Issuer EDGE Registration Request Submitter, the request will enter the Issuer EDGE Registration Request Approver's inbox. There is no notification feature to alert Issuer EDGE Registration Request Approvers of pending requests. Issuer EDGE Registration Request Approvers should check their EDGE server Homepage regularly. The Issuer EDGE Registration Request Approver reviews the request and confirms that a new EDGE server has been requested.

NOTE: Requests in the Issuer EDGE Registration Request Approver's inbox can either be newly submitted requests or previously submitted requests that have been rejected and re-submitted back to the Issuer EDGE Registration Request Approver for approval.

1. From the homepage, Issuer EDGE Registration Request Approvers will see their EDGE registration status inbox with active EDGE requests pending their approval with a status **Pending Org Approval.**

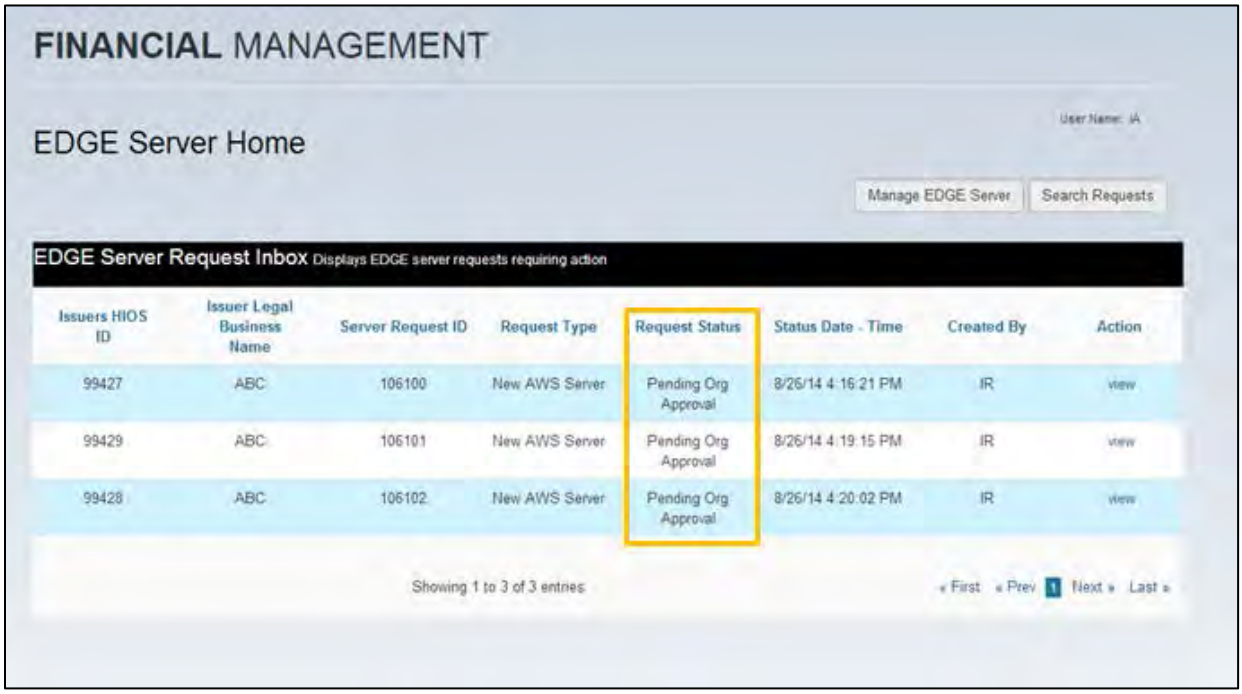


Figure 53 – Issuer EDGE Registration Request Approver Homepage

2. Issuer EDGE Registration Request Approver will select **View** in the **Action** column of their EDGE registration status inbox to open a request to approve.



Figure 54 – Open Request

3. When the Request Approval Screen opens, Issuer EDGE Registration Request Approver will have view only mode. Issuer EDGE Registration Request Approver will review request and confirm accuracy of information entered by the Issuer EDGE Registration Request Submitter.

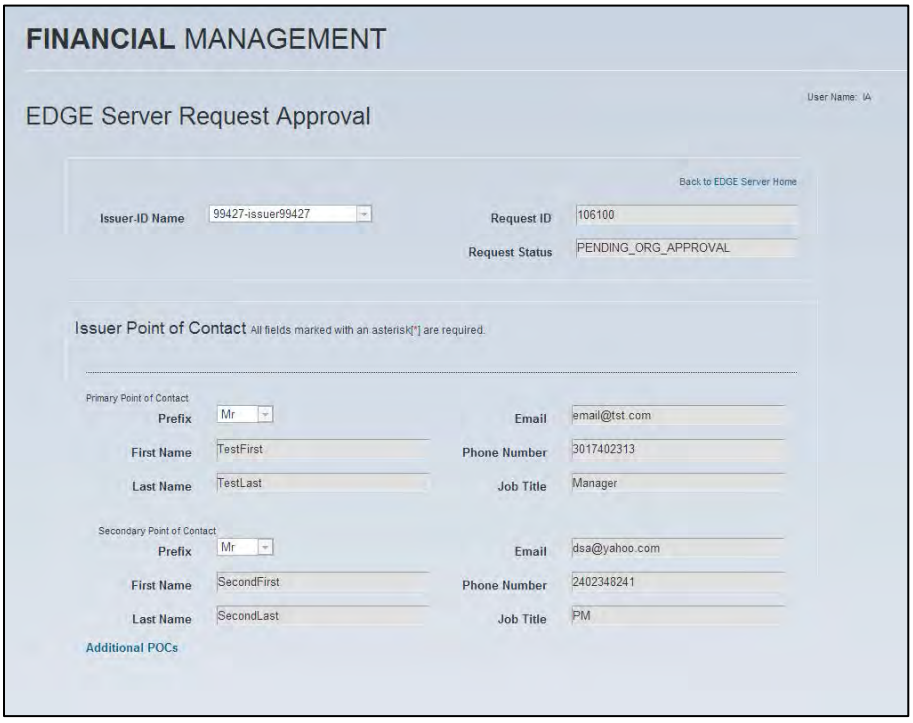


Figure 55 – Request Approval

4. Issuer EDGE Registration Request Approver must either Approve or Reject the Request.
    a. **Rejected Request** – Issuer EDGE Registration Request Approver will need to provide an explanation as to why the request is being rejected in the Comments section and then click Reject Request.

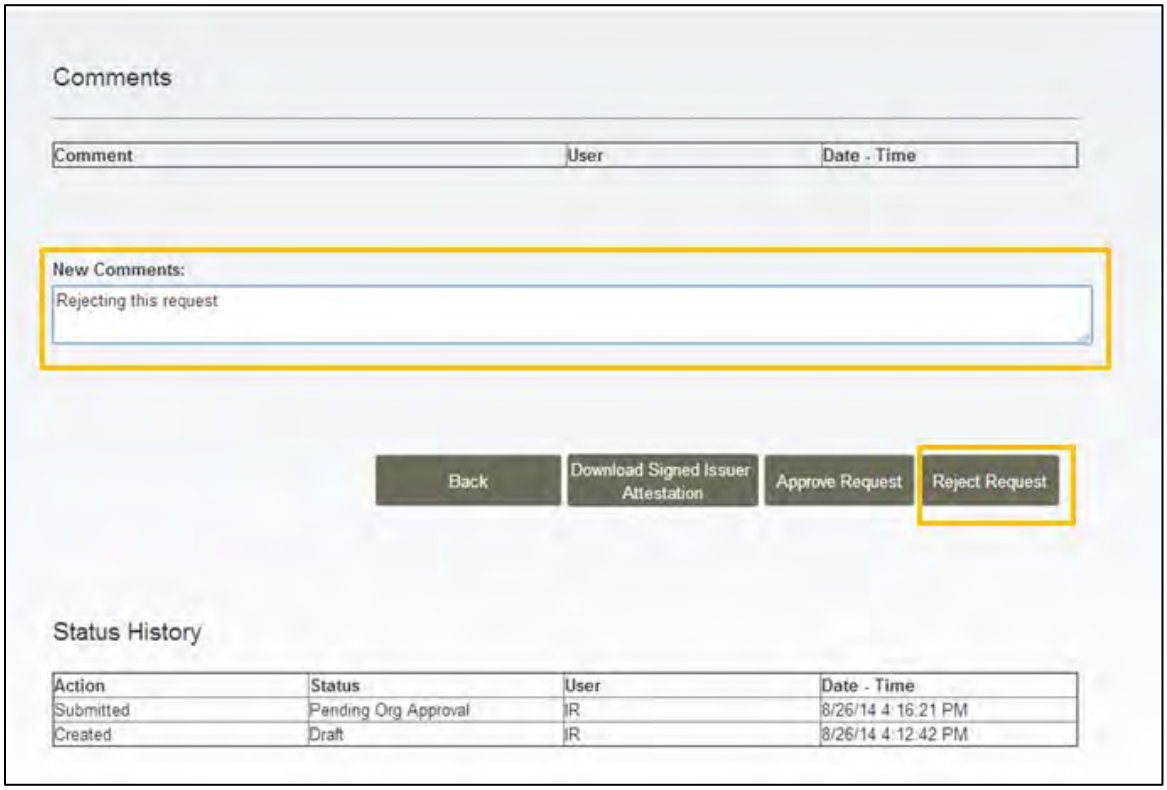


Figure 56 – Reject Request

NOTE: Rejected Requests will return to the Issuer EDGE Registration Request Submitter to make corrections and then send back to the Issuer EDGE Registration Request Approver to approve.

b. **Approve Request** – Issuer EDGE Registration Request Approver can click Approve Request button.

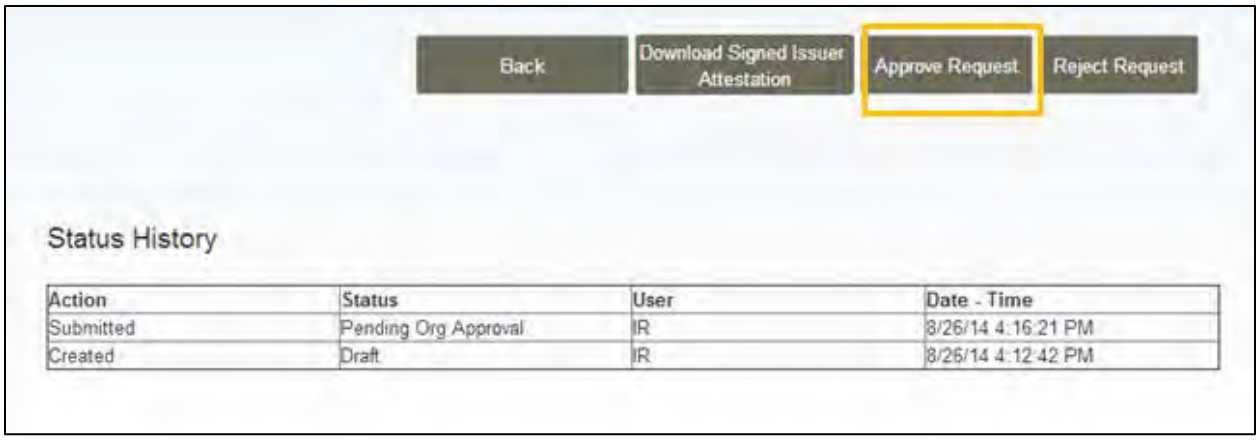


Figure 57 – Approve Request

NOTE: Approved Requests will move to the next step in the process:

- Self-Hosted: Request will now move to CMS Approver's inbox for review.
- TPA-Hosted: Request will now move to TPA EDGE Registration Submitter's inbox for processing.

This completes the EDGE Server Registration Job Aid.