



Centers for Medicare & Medicaid Services
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**CMS Opportunity to Network and Engage
(CMSzONE)**

User Access Quick Guide

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Tips for reading this document

Document Purpose

This zONE End User Access Quick Guide explains how any interested & approved stakeholder may seek to gain access to both the zONE platform, and also any applicable communities of interest on the platform.

Acronyms & Terms

CMSzONE	Center for Medicare and Medicaid Services' (CMS) Opportunity to Network and Engage website. Located @ https://zone.cms.gov/
zONE	See "CMSzONE"
ACA	Affordable Care Act
ACA Marketplace(s)	Affordable Care Act Health Insurance Marketplace(s)
End User	any user whom requires and/or has acquired access to zONE
Community Manager	Any user whom possess the role of Community Manager in an active zONE Community.
The CMS Web Portal	CMS Enterprise Identity Management service (a site and/or application designed to register individuals, and provide them with a username & password for logging onto other systems). Located @ https://portal.cms.gov/

Symbols

	Stop and reflect! Potential negative consequences may occur if not observed & heeded.
	Of specific note, importance, or value and may require pre-requisites before proceeding.

Site Overview

zONE is an online platform for organizations and individuals partnering and working with CMS on ACA Marketplace related matters. It is a secure, collaborative venue for stakeholders such as states, issuers, federal partners, business teams, and technology teams to connect, communicate, and share information such as reusable documents, resources, and best practices.

Mission of zONE

zONE enables Marketplace communities to connect, communicate and share information to create a learning culture that leverages the knowledge and talents of its members and advances the potential for success of Marketplace implementation & operations.

Some benefits of zONE

- Document threads for file sharing
- Shared Wiki articles
- Community Calendar/Event Management
- A powerful global spotlight search of all user authorized content
- A personalized user dashboard for easy applicable content consumption
- Multiple, private stakeholder communities for a variety of Marketplace related content
- Site secured by CMS Identity Management, with registration open to all CMS & non-CMS Marketplace stakeholders
- Ongoing site evolution, including design & site feature additions & expansion to accommodate new requirements & needs

Warnings & Cautions

Warning: Unauthorized Access

Unauthorized access to this United States Government Computer System and software is prohibited by Title 18 of the United States Code, Section 1030, Fraud and Related Activity in Connection with Computers.

Warning: Computer Usage

The Standards of Ethical Conduct for the Employees of the Executive Branch (5 CFR 2635.704) do not permit the use of government property, including computers, for other than the authorized purposes.

Caution: Sensitive Information

Do not store sensitive information (e.g., information concerning an individual) in electronic files in a way that allows unauthorized persons to access the information.



No Protected Health Information (PHI), or Personally Identifiable Information (PII) is authorized to be posted on zONE.

Reminder: Retention of Records

Documents that you create electronically, including electronic mail, may be governed by the Federal Records Act (Title 44 United States Code 3314) just as hard-copy records can be. Do not destroy electronic records that are subject to the Act except pursuant to an approved records disposition schedule.

Quick Steps to Access zONE & zONE Communities

- 1) Register & establish an account on the CMS Web Portal (<https://portal.cms.gov>)
- 2) Login to the CMS Web Portal with your new account, and request an appropriate role for the zONE platform (In most instances, the role of “**End User**” is the appropriate role)
- 3) Wait for an approval email (typically 1-3 business days) from the CMS Web Portal system
- 4) Login to zONE (<https://zone.cms.gov>) with your CMS Web Portal username & password
- 5) Navigate to Private Communities and choose one or more of the various communities to seek membership by clicking the link & submitting the request form
- 6) Wait for an approval email (length of time for review varies by community) from the zONE system for the specific community(ies) requested
- 7) Site access complete! Login to zONE & navigate to any listed communities of interest to discover content, discussions, & contacts therein

Quick Steps (w/ Figures) to Access zONE & zONE Communities

1. Register on the CMS Web Portal (<https://portal.cms.gov>)

Figure 1.1 – Web Portal New User Registration Link

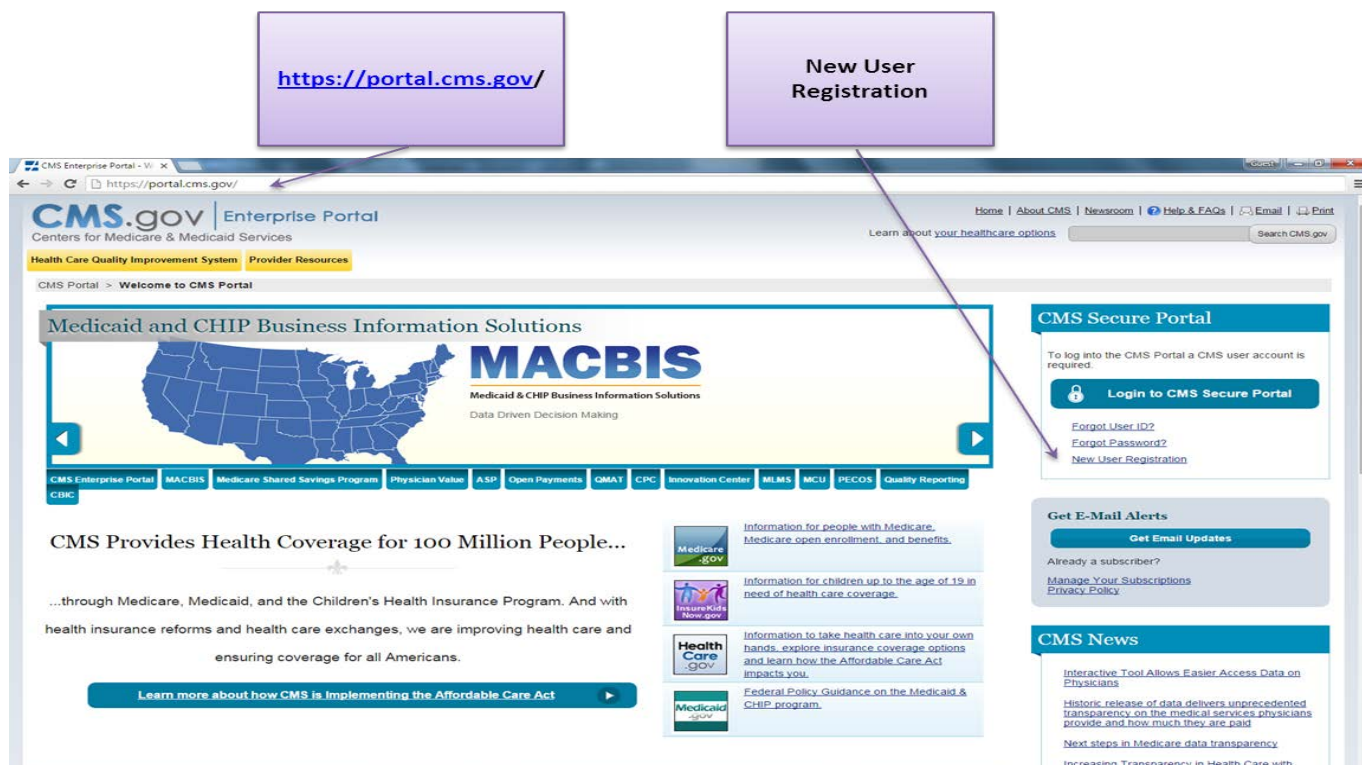


Figure 1.2 – Web Portal Registration Terms & Conditions

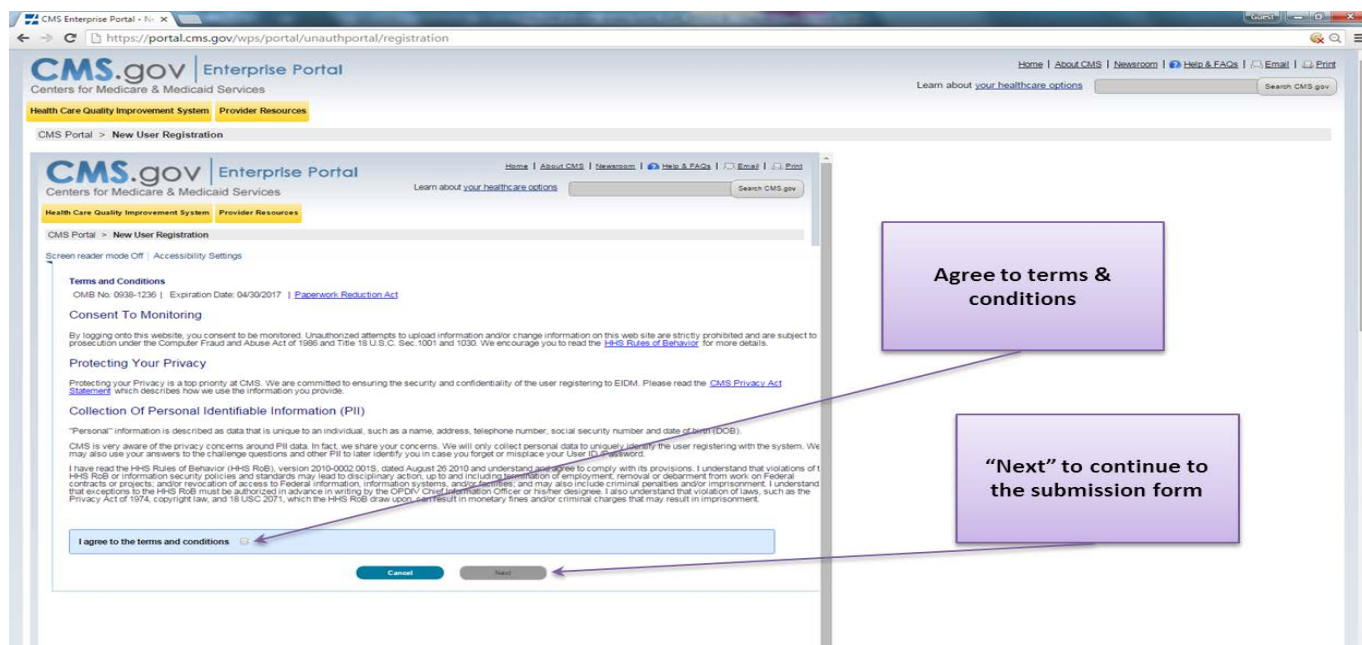


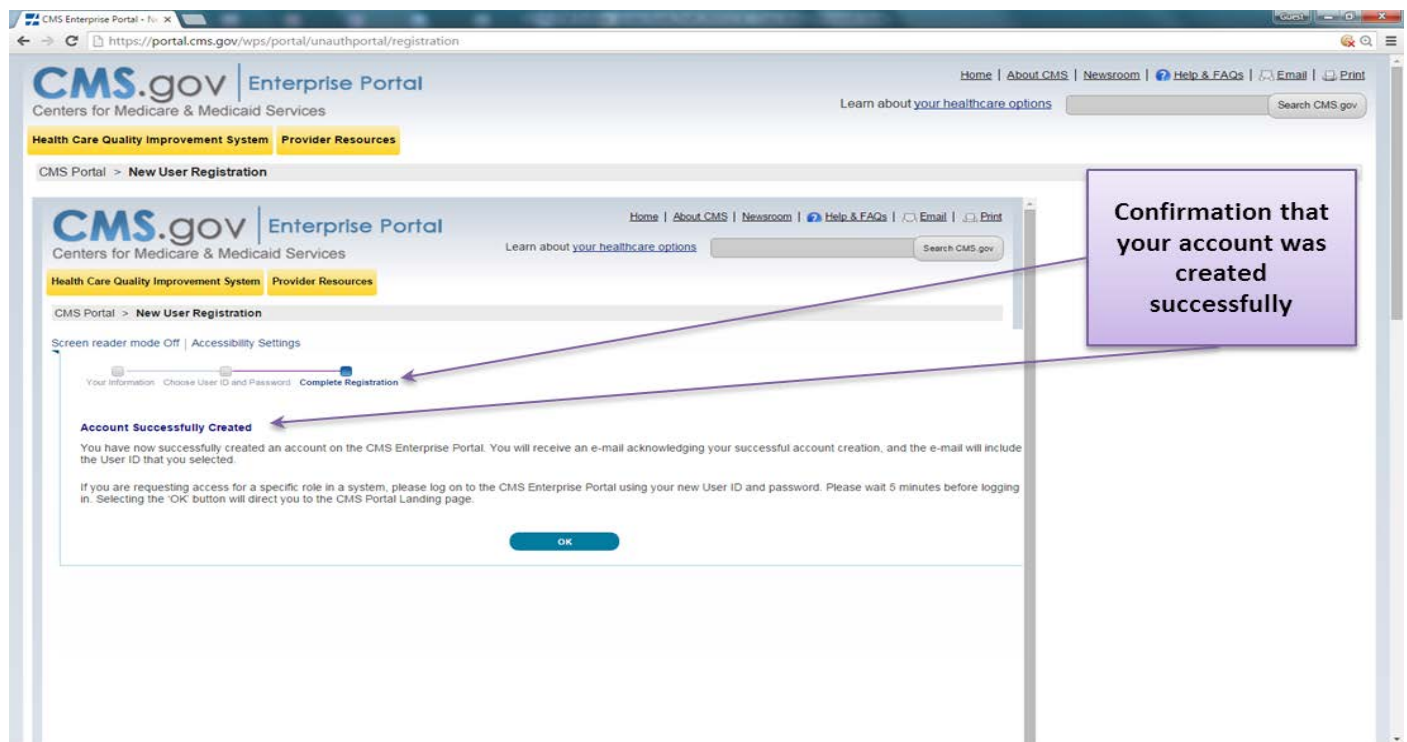
Figure 1.3 – Web Portal Registration Form

The screenshot shows the 'New User Registration' form on the CMS.gov Enterprise Portal. The form is titled 'Your Information' and includes fields for First Name, Last Name, Suffix, Email Address, Social Security Number, Date of Birth, Home Address Line 1, Home Address Line 2, City, State, Zip Code, and Primary Phone Number. A purple callout box on the right states: 'Note that the SSN is NOT a REQUIRED field for submission (Required fields are demarcated w/ an asterisk)'. Another purple callout box below it states: 'Once all required fields are complete, "Next" to continue with submission'. The 'Next' button is highlighted with a purple arrow.

Figure 1.4 – Web Portal User ID & Password Creation Form

The screenshot shows the 'Choose User ID And Password' form on the CMS.gov Enterprise Portal. The form includes fields for User ID, Password, and Confirm Password. Below these fields is a section titled 'Select your Challenge Questions and Answers:' with three questions and their corresponding answers. A purple callout box on the right states: 'Choose your User ID & Password, and your security Q&As, and then "Next" to finalize your submission (security Q&As are used in the event you lose/forget your password, or if you are ever locked out of your account)'. The 'Next' button is highlighted with a purple arrow.

Figure 1.5 – Web Portal Successful Account Creation Confirmation Page



2. Login to the Portal, request a role for zONE

Login to the CMS Web Portal with your new account, and request an appropriate role for the zONE platform (In most instances, the role of “End User” is the appropriate role)

Figure 2.1 – Web Portal Login Page



Figure 2.2 – Web Portal Terms & Conditions of Use

The screenshot shows the 'Terms and Conditions' page of the CMS.gov Enterprise Portal. The page header includes the CMS.gov logo and navigation links. A purple callout box with the text 'Accept the terms & conditions of use' has an arrow pointing to the 'I Accept' button. The main content area contains the following text:

OMB No.0938-1236 | Expiration Date: 04/30/2017 | Paperwork Reduction Act

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this computer network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.
- At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.

At the bottom of the main content area are two buttons: 'I Accept' and 'Decline'.

The footer contains links to CMS & HHS Websites, Tools, and Helpful Links.

Figure 2.3 – Web Portal Username & Password Login Form

The screenshot shows the 'Welcome to CMS Enterprise Portal' login page. A purple callout box with the text 'Input Username & Password, and "Log In"' has an arrow pointing to the 'Log In' button. The main content area contains the following text:

Welcome to CMS Enterprise Portal

User ID

Password

Log In Cancel

[Forgot Password?](#)

[Forgot User ID?](#)

Need an account? Click the link - [New user registration](#)

The footer contains links to CMS & HHS Websites, Tools, and Helpful Links.

Figure 2.4 – Web Portal Access Request Button

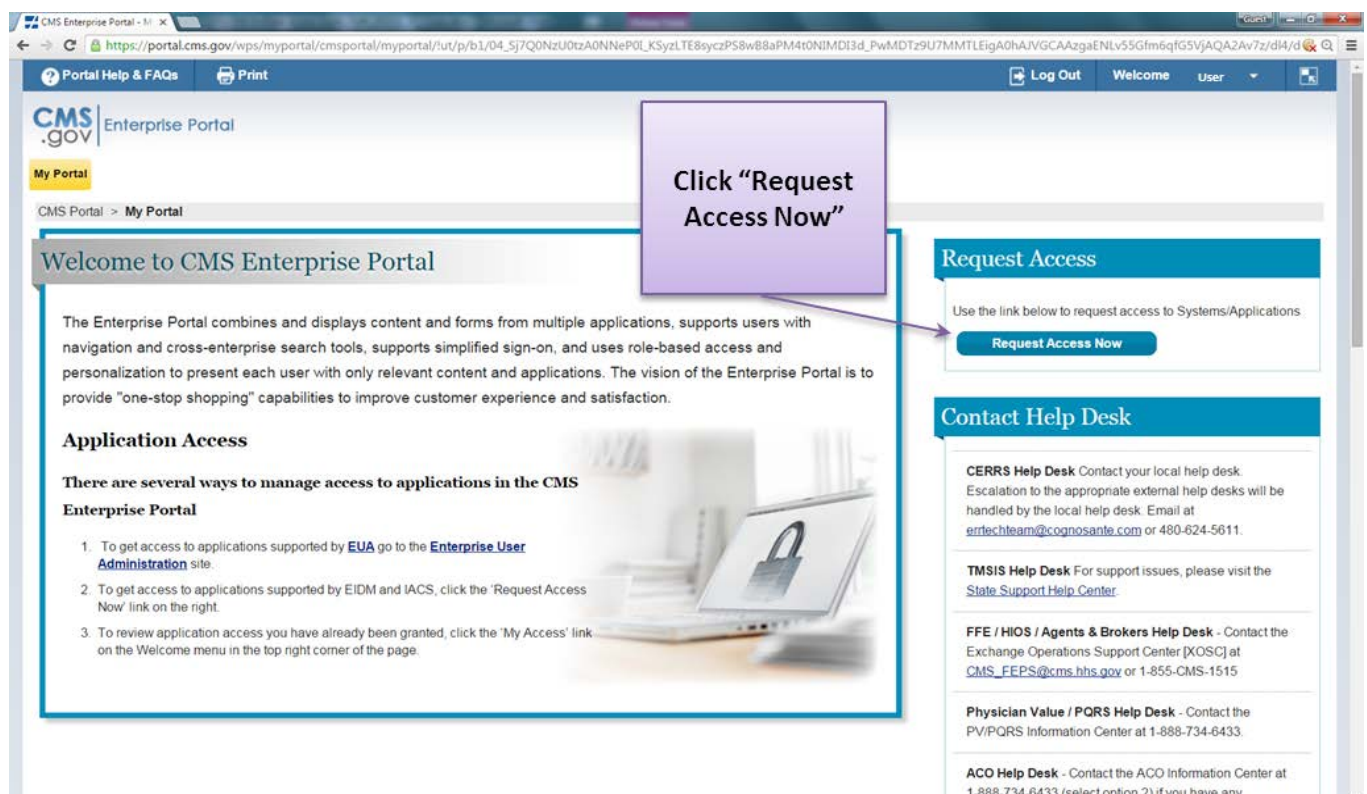


Figure 2.5 – Web Portal List of Systems

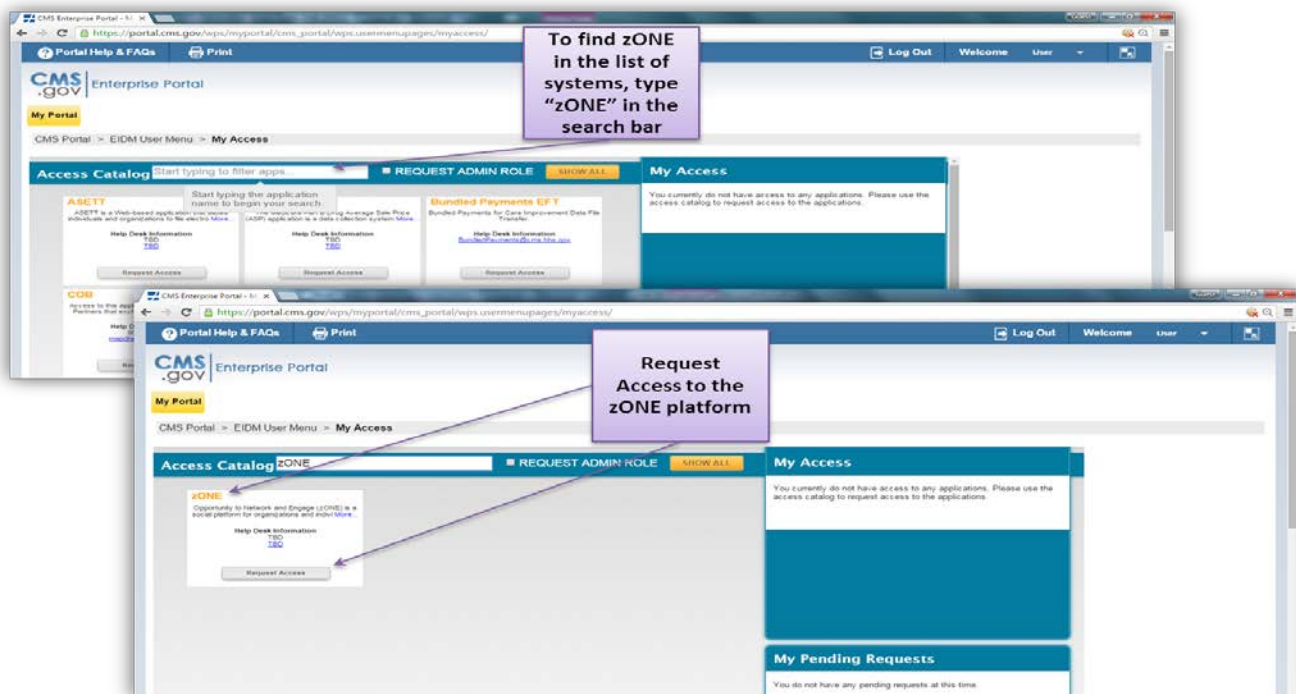


Figure 2.6 – Web Portal Role Request Form for zONE Platform

The screenshot shows the 'Request New System Access' form in the CMS Enterprise Portal. The form includes a sidebar with 'My Access' links, a main content area with a 'Request New System Access' heading, and a 'Notes to Approver' section. Callouts point to specific fields: 'Select the "zONE End User" Role' points to the 'Role' dropdown; 'Choose your organization type' points to the 'Organization Type' dropdown, with a note that 'TPUs may receive additional access scrutiny'; 'Each Role & Org Type requires a limited set of data to make your request' points to the 'Please submit role data' section; and 'Submit your request once all details are complete' points to the 'Submit' button.

Select the "zONE End User" Role

Choose your organization type
If none fit, select "Third Party User".
TPUs may receive additional access scrutiny for zONE Community Memberships to ensure content is limited to the appropriate audiences.

Each Role & Org Type requires a limited set of data to make your request

Submit your request once all details are complete

Figure 2.7 – Web Portal Role Request Submission Acknowledgement Page

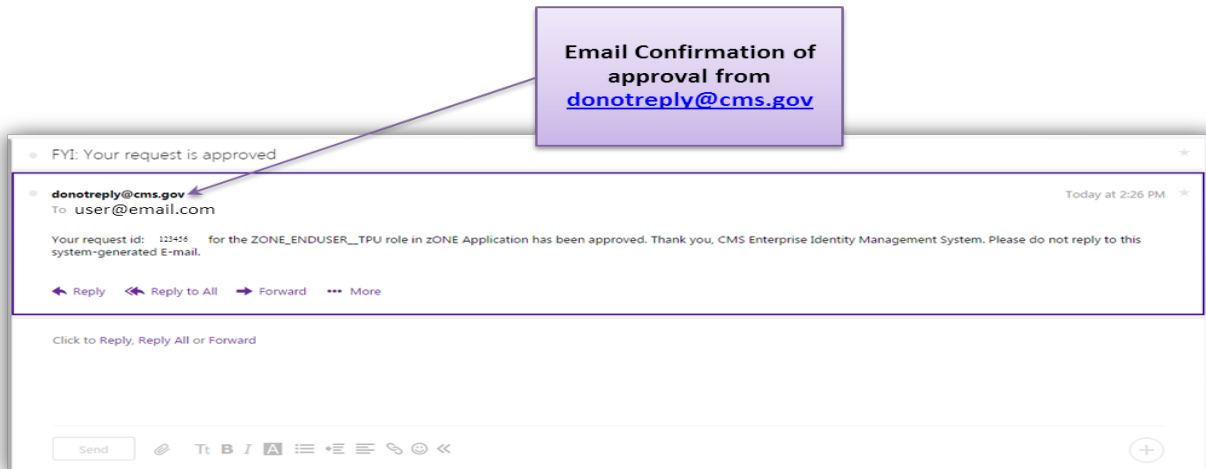
The screenshot shows the 'Request Acknowledgement' page in the CMS Enterprise Portal. The page displays a confirmation message: 'Your request to access zONE using the zONE End User role has been successfully submitted. Your request id is: 15796638'. A callout points to this message with the text 'Confirmation of successful submission'. The page also includes a 'Request Acknowledgement' heading, a 'Your request to access zONE using the zONE End User role has been successfully submitted.' message, and a 'Your request id is: 15796638' message. A 'OK' button is visible at the bottom.

Confirmation of successful submission

3. Receive an approval email for the zONE End User Role

Wait for an approval email (typically 1-3 business days) from the CMS Web Portal system

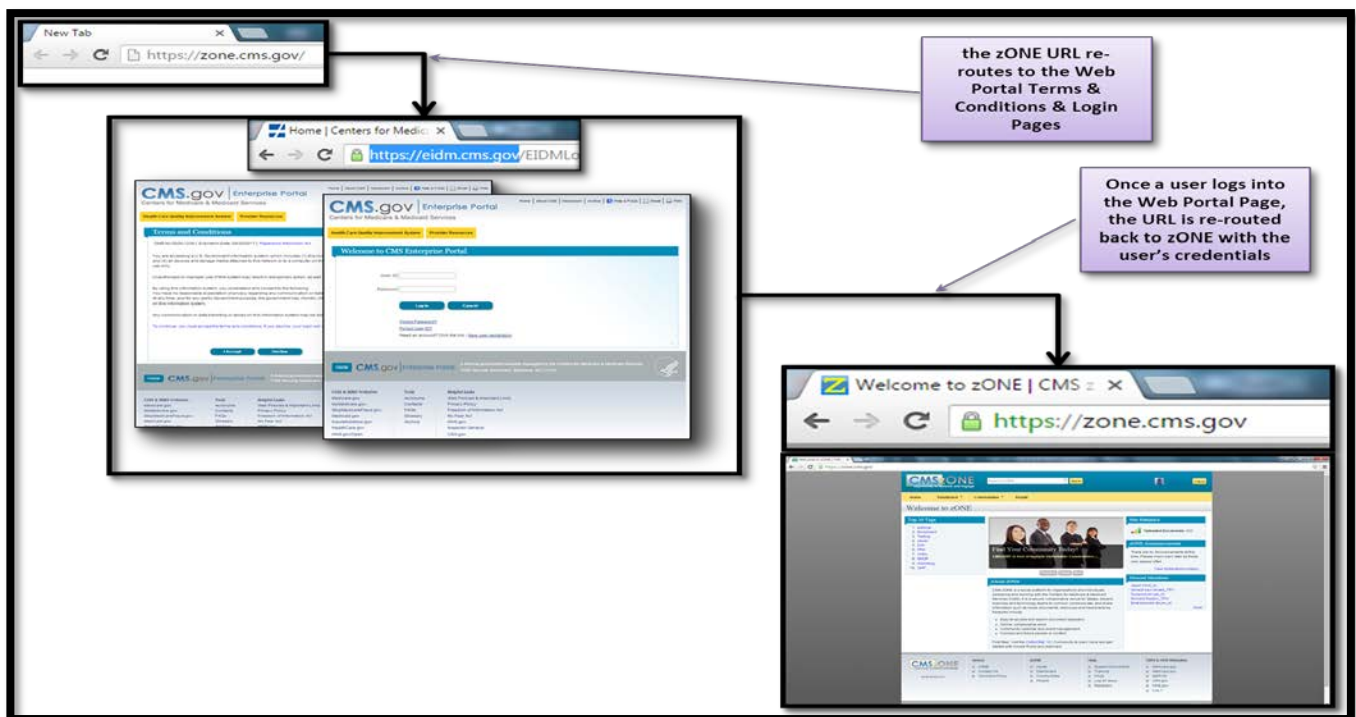
Figure 3.1 – Web Portal Email Confirmation of zONE Role Approval



4. Login to zONE with your Web Portal username & password

Login to zONE (<https://zone.cms.gov>) with your CMS Web Portal username & password

Figure 4.1 – zONE Login Redirect Illustration



5. Seek Membership to Private Community(ies)

Navigate to Private Communities and choose one or more of the various communities to seek membership by clicking the link & submitting the request form

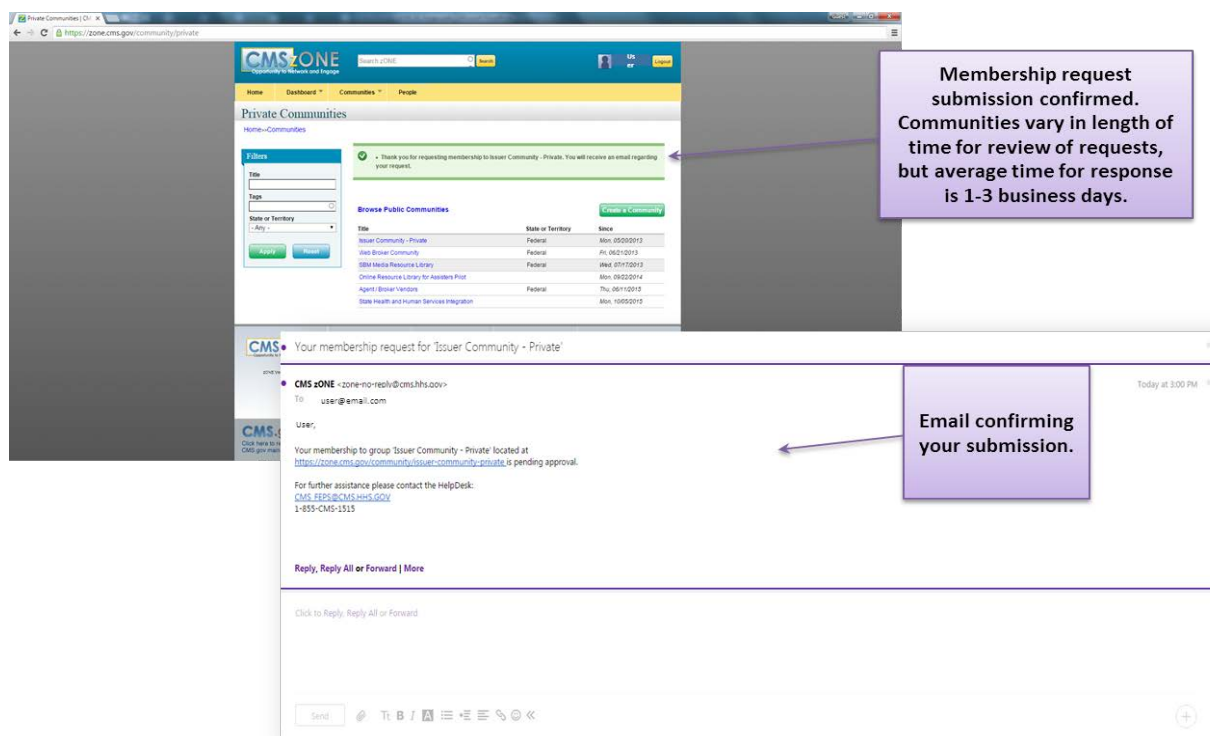
Figure 5.1 – zONE Home Page & the Communities Tab

The screenshot shows the CMSzONE Home Page. The top navigation bar includes links for Home, Dashboard, Communities, and People. The 'Communities' tab is highlighted. Below the navigation bar, there's a 'Welcome to zONE' message and a 'Find Your Community Today!' section. A callout box points to the 'Communities' tab, stating: "Public Communities are available to all zONE End Users; however most content lives within Private Communities. Hover over the 'Communities' tab to navigate to one of the lists of Communities. Once you've joined one or more communities, they will appear under the 'My Communities' Drop down as well (for quick access)." Another callout box points to the 'CMSzONE 101 Public Community' link, stating: "If you are new to zONE, the CMSzONE 101 Public Community is a great place to learn more about the site." The page also features a 'Top 10 Tags' list, 'Site Statistics', 'zONE Announcements', and 'Newest Members'.

Figure 5.2 – zONE Private Communities List & Membership Request Form

The screenshot shows the 'Private Communities' list and the 'Membership Request Form'. The 'Private Communities' list displays a table with columns for Name, Status, and Action. A callout box points to the 'Join' button, stating: "Click one of the private communities to request membership to it." The 'Membership Request Form' is shown below the list, with a callout box pointing to the 'Join' button, stating: "Provide an explanation for why you are/should be an authorized & relevant stakeholder for this Community, and click 'Join'." The form includes a text area for the explanation and a 'Join' button.

Figure 5.3 –Community Membership - Request Acknowledgement Page & Email Confirmation



6. Receive Email Confirmation of Community Membership Approval

Figure 6.1 – Email Confirmation of Community Membership Approval

