508 Compliant Version

Requesting an AWS EDGE Server Instance

Introduction

The EDGE server video series provides issuers and Third Party Administrators, video demonstrations on how to complete the required tasks as part of operating an EDGE server. These videos will guide you through all of the tasks you need to complete as part of registering for an EDGE server, provisioning an EDGE server, and processing files on your EDGE server. The videos are grouped depending on whether you are operating an Amazon EDGE or On-Premise EDGE server, and also whether your server will be, self-hosted or hosted by a TPA. Issuers and TPAs operating an Amazon EDGE server should access and view the videos. Issuers and TPAs operating an On-Premise EDGE server should access and view the videos. All of these videos and their accompanying job aids can be found on REGTAP.

Hello and welcome to this video tutorial on how to request an AWS EDGE Server instance. This video guide is intended for issuers and TPAs who will be operating an Amazon Edge Server. In order to complete the steps covered in this tutorial, you should have already completed the AWS account set-up described in the AWS Account Setup Job Aid. This job aid can be found on REGTAP. You will also need to have an AWS account. If you do not currently have an AWS account, pause the video and create one now.

During this session, you will learn how to request an AWS instance from CMS as part of provisioning an Amazon EDGE server. This video will walkthrough how to create an IAM role for EDGE and create a Key Pair file that will be used to configure your EDGE server. All the activities covered in this tutorial will be performed through the Amazon Web Services portal.

Step 1:

- Let's get started by going to aws.amazon.com.
- You will first log into your Amazon account.

Step 2:

- Now click on **Services** in the upper left hand corner of the screen.
- Next, click on **All AWS Services** and then click on **IAM**.

Step 3:

- Your next step is to Select **Role** from left navigation bar.

Step 4:

- And then click on **Create New Role** near the top.

Step 5:

- Enter the name "**EdgeInstaller**" in the text box and select the **Next Step** button at the bottom right.

Step 6:

- In the next window, you will select **Role for Cross-Account Access** option.

Step 7:

- Then, click the **Select** button for the option: **Allows IAM users from a 3rd party AWS account to access this account.**

Step 8:

- In the next window enter the **CMS Account** number **494058909136** in the Account ID text box and your Issuer Account ID (this is the number you wrote down earlier) in **External ID** field.
- The CMS number has been provided by CMS and can be found in the accompanying job aid.
- Click on the **Next Step** button.

Step 9:

- You should now be on the "Set Permissions" page. On this page, select the **Custom Policy** radio button and click **Select.**

Step 10:

- Now, enter **"EdgeInstallerPolicy"** (all one word, without spaces), in the **Policy Name** field.
- In the **Policy Document** field, copy/paste the text inside the EDGE Installer **Policy document. EDGE Installer Policy Data needed for step this step is posted in a separate document accessible on REGTAP. Please click the link embedded in the accompanying Job Aid to to access the EDGE Installer Policy document on REGTAP.**
- Once the text is inputted, click the Continue button.

Step 11:

- Review/Edit the role information if necessary.
- Then, select the **Create Role** button.

Conclusion of Create Role, Introduction to key pair:

This brings us to the conclusion of how to create an IAM role for EDGE in AWS. Now, let's create the Key Pair file. The Key Pair will be used by to connect to your AWS EDGE Server instance during provisioning.

Step 12:

- Let's start by clicking on **Services** in the upper left hand corner of the home page.
- Next, click on **All AWS Services**, and then click on **EC2**.

Step 13:

- Now click on **Key Pairs** on the left side of the screen.

Step 14:

- Click on the **Create Key Pair** button

Step 15:

- Name your key pair by typing **"EdgeServer"** (all one word, without spaces) into the field
- Click on the **Create** button.

Step 16:

- When you see this pop-up window asking you to either Save the File or Open it, You **MUST** choose to save the file.
- Ensure the file is saved on your computer where you can easily retrieve it. This file will be used later.
- NOTE: If you lose the file, you will be unable to connect to the server until you find it or create another Key Pair.
- 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.

Conclusion

You have now successfully created your key pair in AWS. This completes Requesting an AWS EDGE Server Instance video. Please remember to secure your Key Pair file as, without it, you will be unable to connect to the CMS EDGE Server once the instance is provisioned. You now have the tools to start requesting an Amazon Edge server instance. Additional resources can be found on REGTAP and for EDGE Server support, please send all questions to CMS Help Desk by emailing: CMS_FEPS@cms.hhs.gov or call 1-855-CMS-1515