



# **Secure Access Management Services (SAMS)**

# **Electronic Authentication Process for the Inventory Management and Tracking System (IMATS)**

**IMATS - SAMS User Registration Webinar**



# Objective

- To provide information on registering with SAMS for identity proofing of *all* users accessing IMATS

# Electronic Authentication Terminology

- **Electronic authentication** is the CDC's web-based process of becoming identity proofed
- **Secure Access Management Services (SAMS)**
- **Identity verification = Identity proofing = ID proofing**
  - These terms are used interchangeably

# Electronic Authentication Terminology

- **Candidate** is someone who is invited by SAMS to register in SAMS
- **Applicant** is someone who is registered in SAMS but has not yet been approved for access to their requested activity, such as IMATS
- **User** is someone who has completed identity verification and has been approved for their requested activity by the respective Activity Administrator

# Electronic Authentication Terminology

- **Activity Administrator (AA)** — CDC person who authorizes a user for access to IMATS, after a user has been successfully identity proofed
- **CDC Proofing Authority (PA)** — group within the CDC that checks your identification verification form and any supporting documentation for completeness and accuracy with respect to the actual ID that was used for verification by the proofing agent
- **Proofing Agent** — individual authorized to conduct in-person identity verification (proofing); at this time, authorized proofing agents are limited to notaries public or badged CDC workers (FTEs or contractors)



# Registration Process and Access to IMATS

Secure Access Management Services (SAMS)



# SAMS

- SAMS is the next generation replacement for CDC's legacy SDN portal. SAMS does not use digital certificates
- SAMS is a United States federal government IT system that provides secure external access to non-public CDC applications for use by authorized personnel for public health use
- To be a SAMS user, you must receive an invitation by email to start the registration process
- You are receiving this invitation because you have been identified as needing access to the IMATS application

# SAMS Registration Process Steps Overview

1. Candidate receives an email invitation from SAMS inviting them to register in SAMS
2. Candidate logs in to SAMS with their username (email address) and the temporary password that was provided in the SAMS invitation email
3. Candidate changes password, accepts the SAMS Rules of Behavior and enters responses to the registration questions

# SAMS Registration Process Steps

## IMATS User Steps

4. Applicant (formerly known as candidate) receives email confirming their registration with SAMS. A partially pre-populated identity verification form is included as part of this email notification
5. Applicant prints out the identity verification form and takes it to a Proofing Agent with an appropriate form of ID for verification

# SAMS Registration Process Steps

## IMATS User Steps

6. Applicant mails or faxes endorsed identity verification form, copy of identity (i.e. drivers license), and copies of any supporting documentation to CDC proofing authority
7. CDC proofing authority notifies applicant of receipt of documentation. If any additional information is needed, CDC proofing authority notifies applicant for clarification

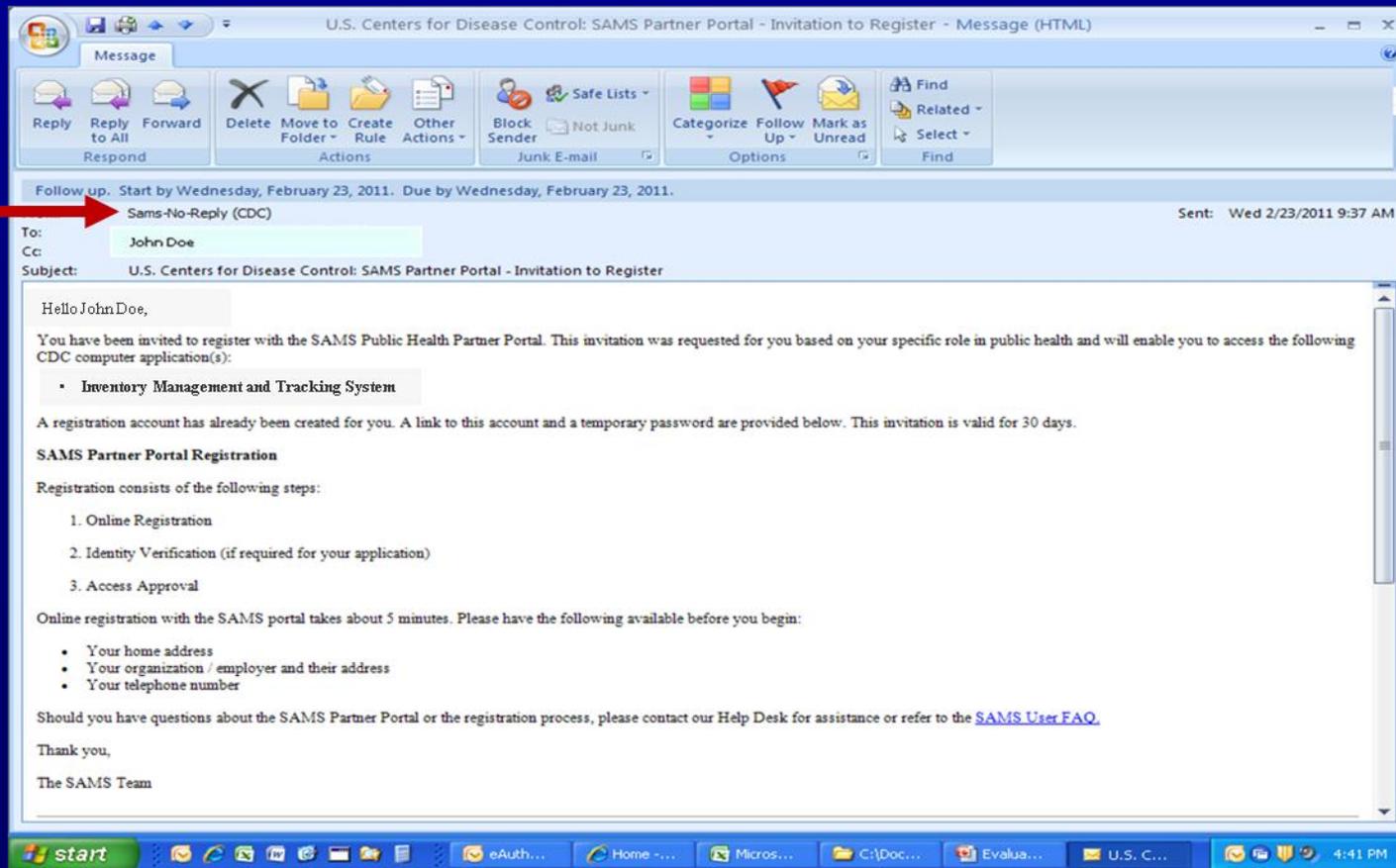
# SAMS Registration Process Steps

## IMATS User Steps

8. Once approved, user (formerly known as applicant) receives two welcome emails from SAMS and IMATS each with its own login instructions
9. CDC proofing authority notifies applicant via US Postal Service mail

# Receive Invitation by SAMS (Step 1)

- The email you receive from “Sams-No-Reply (CDC)” contains a link to the SAMS website, on which you will register for access to SAMS
- This email will provide you with a user name and temporary password to use to start registration process in SAMS



# SAMS Invitation Email (Step 1 Continued)

U.S. Centers for Disease Control: SAMS Partner Portal - Invitation to Register - Message (HTML)

Message

Follow up. Start by Wednesday, February 23, 2011. Due by Wednesday, February 23, 2011.

From: Sams-No-Reply (CDC) Sent: Wed 2/23/2011 9:37 AM  
To: John Doe  
Subject: U.S. Centers for Disease Control: SAMS Partner Portal - Invitation to Register

Should you have questions about the SAMS Partner Portal or the registration process, please contact our Help Desk for assistance or refer to the [SAMS User FAQ](#).

Thank you,  
The SAMS Team

To register with the SAMS Partner Portal, please click the following link or cut and paste it into your browser:

<https://fm.cdc.gov/idm/SAMS/index.jsp?task.tag=SAMSRegistration>

When prompted, please enter:

- Your Username: johndoe@state.gov
- Temporary Password: +4Li\*Y3o

and click the Login button.

\*\*\*Note: In order to access the SAMS Partner Portal, your browser *must* be configured to use TLS 1.0 encryption. If your computer is not configured for TLS, or if you are unsure, please contact your local IT System Administrator for assistance.

For more information and assistance, please see the SAMS FAQ located [here](#), or contact the SAMS Help Desk between the hours of 8:00 AM and 8:00 PM EST Monday through Friday (excepting U.S. Federal holidays) at the following:

Toll Free: 877-681-2901  
Email: [samshelp@cdc.gov](mailto:samshelp@cdc.gov)

\*\*\*Note: This email has been sent from an unmonitored mailbox. DO NOT REPLY TO THIS EMAIL. Please direct all inquires to the Help Desk as listed above.

start | eAuth... | Home ... | Micros... | C:\Do... | Evalua... | U.S. C... | 4:46 PM

# Key Points (Step 1)

- Email is sent from **Sams-No-Reply (CDC)**. This is a valid and official email from CDC. **Please do not delete thinking this is spam. Also please check your spam email folder if you haven't received the email invitation**
- Candidate has a **30 day** SAMS registration window - Reminders sent on **15th & 25th** day
- After **30 days**, candidate will be removed and will have to be invited again



# Candidate log in to SAMS (Step 2)

SAMS Login - Windows Internet Explorer provided by ITSO

File Edit View Favorites Tools Help

SAMS Login

**CDC**

**Welcome to the SAMS Partner Portal**

**Warning:** This is a U.S. Federal Government system and shall be used only by authorized persons for authorized purposes. Users do not have a right to privacy in their use of this government system. System access, activity, and information stored or transmitted may be monitored for adherence to acceptable use policy. Users of this system hereby consent to such monitoring. Improper or illegal use detected may result in further investigation for possible disciplinary action, civil penalties, or referral to law enforcement for criminal prosecution. This system contains non-public information that must be protected from unauthorized access, disclosure, sharing, and transmission, violation of which can result in disciplinary action, fines, and/or criminal prosecution.

Username: johndoe@state.gov

Password: ●●●●●●

Login

Forgot your password? Click [here](#).

Trusted sites 100%

start Inb... Hom... Micr... SAM... U.S... C:\D... Micr... 11:35 AM



# Candidate accepts Rules of Behavior (Step 3)

The screenshot shows a Windows Internet Explorer browser window titled "Secure Access Management Services (SAMS) - Windows Internet Explorer provided by ITSO". The address bar shows the URL "Secure Access Management Services (SAMS)". The page content is titled "Registration: SAMS Rules of Behavior" and includes the following sections:

### CDC SAMS User Rules of Behavior

#### Overview

Secure Access Management Service (SAMS) is a United States federal government computer system that provides secure external access to non-public CDC applications for use by authorized personnel. Users should be aware that they have no expectation of privacy when using SAMS or SAMS-protected program applications. All user actions are recorded and may be reviewed by CDC officials with a legitimate reason to do so as authorized by CDC's Office of the Chief Information Security Officer. The following rules of behavior apply to all SAMS' users.

Because written guidance cannot cover every contingency, users are asked to go beyond the stated rules, using their best judgment and highest ethical standards to guide their actions. These rules are based on federal laws and regulations and on applicable agency directives. As such, there are consequences for non-compliance. Based on the severity of the violation and through due process of the law, consequences can include, but are not limited to: suspension or loss of access privileges and/or civil and criminal penalties. Use of SAMS, and the applications it protects, is restricted to users that have been specifically authorized and granted access by CDC or its designated agents.

#### SAMS User Accounts

All SAMS' user accounts are uniquely identified by a username and protected with a password. Passwords automatically expire every sixty (60) days. SAMS will prompt users to update expired passwords on their next login. If a user feels their password may have been compromised, they must change it immediately. In addition, the user must report any suspected misuse or unauthorized access to the SAMS Help Desk as quickly as possible.

SAMS allows users to reset a forgotten password using a set of secret security questions they select and complete during registration. Selected questions and answers should be easy for a user to remember but difficult for others to guess. Since question and answer combinations can provide access to a user's account, they must be protected in the same way as a password.

If a user fails to enter the correct username and password combination three (3) times in a row, their account will be locked for one (1) hour, after which, the user may try again. If the user cannot recall their password, they can follow the 'forgotten password' link on the SAMS login page to reset it. If a user does not remember their password and is unable to successfully answer their security questions, a new account must be created.

#### User Responsibilities and Rules of Behavior

- SAMS' users are uniquely identified through their SAMS user account. Once a user's request for access has been granted and their account is active, the user is responsible for all actions taken using that account. Therefore, every effort should be made to protect the account password and related security information. To help prevent account compromise, users agree:
  - To keep their account private and not share their password with anyone.
  - To securely store and protect any written copy of their user name and/or password.
  - To make every effort to prevent others from watching password entry.
  - To choose passwords that are difficult to guess by avoiding the use of well known personal information.
  - To log off of the system when finished or whenever leaving their computer unattended.
- Users must not access SAMS or Program applications using an account that belongs to another person.
- Users must not attempt to circumvent any SAMS' security control mechanism.
- SAMS' users are provided access to sensitive and/or non-public information to assist them in performing their duties and for the betterment of national, state, and local public health services. Users must take positive steps to protect this information, the people this information may represent, and the systems designed to protect it. Users must report improper or suspicious activities involving SAMS' information and systems to the SAMS Help Desk.

At the bottom of the page, there are "Accept" and "Cancel" buttons. The browser's status bar shows "Trusted sites" and a zoom level of "65%". The Windows taskbar at the bottom shows the start button, several application icons, and the system clock displaying "11:39 AM".



# Candidate completes Registration (Step 3)

Secure Access Management Services (SAMS) - Windows Internet Explorer provided by ITSO

File Edit View Favorites Tools Help

Secure Access Management Services (SAMS)

Welcome: Harshad Joshi Logout

## Registration

Please provide the following information to register with SAMS, and click Submit. Required fields are marked with a red asterisk (\*). Your registration will be routed to a SAMS Application Administrator for approval. You will receive an email notification when your registration has been approved and you have been granted access to SAMS.

User ID

First Name\*

Middle Name

Last Name\*

Suffix

Preferred Name

Email

### Home Address

Address Line 1\*

Address Line 2

City\*

State\*

Postal Code\*

Country\*

Organization Name\*

Organization Role

Done Trusted sites 77%

start Inb... Ho... Micr... Sec... U.S... C:\... Micr... 11:43 AM

# Candidate completes Registration Continued (Step 3)

Secure Access Management Services (SAMS) - Windows Internet Explorer provided by ITSO

File Edit View Favorites Tools Help

Secure Access Management Services (SAMS)

### Organization Address

Address Line 1\*

Address Line 2

City\*

State\*

Postal Code\*

Country\*

Primary Phone\*

Alternate Phone

You must specify a new password. Your password must:

- 
- 
- 

Password\*  Confirm Password\*

Your answers to the following questions will be used to verify your identity should you forget your password.

Question:	Answer:
Q1* <input type="text" value="Name of the city/town where you were born"/>	A1* <input type="text"/>
Q2* <input type="text" value="Name of the city/town where you were born"/>	A2* <input type="text"/>
Q3* <input type="text" value="Name of the city/town where you were born"/>	A3* <input type="text"/>
Q4* <input type="text" value="Name of the city/town where you were born"/>	A4* <input type="text"/>
Q5* <input type="text" value="Name of the city/town where you were born"/>	A5* <input type="text"/>

Submit Cancel

Done Trusted sites 77%

start In... Ho... Micr... Sec... U.S... C:\... Micr... 11:46 AM



SAFER • HEALTHIER • PEOPLE™

## Key Points (Step 3)

- It is very important that the applicant fill out the SAMS registration fields exactly as the information appears on the form of ID that they intend to use for verification.
- Failure to do so may result in:
  - requests for more information or clarification
  - approval not being granted

# Applicant receives confirmation email to fulfill identity verification (Step 4)

The screenshot shows an email client window titled "U.S. Centers for Disease Control: SAMS Partner Portal - Identity Verification Request - Message (HTML)". The email is from "Sams-No-Reply (CDC)" to "John Doe" and was sent on "Wed 2/23/2011 12:38 PM".

The email content is as follows:

Hello John Doe,

Thank you for registering with CDC's SAMS Partner Portal. Your registration information has been received and is currently pending approval.

In order to provide individuals with access to non-public information, U.S. law *requires* the identity of potential users to be verified - this step is critical in helping to protect people's private data and in helping to prevent information misuse. Please be assured that CDC and its Programs have made every effort to keep this necessary process as simple and non-intrusive as possible. Also be assured that your identity information will only be used to help determine your suitability for access and that this data will not be shared outside of CDC programs.

To complete identity verification, please print the form attached to this email message and follow the instructions provided below. The required steps are as follows:

1. Complete the Applicant Section in the attached form - part of the information has been pre-filled for you based on the information you supplied during registration.
2. Take the printed form, along with appropriate photo identity documentation to a Proofing Agent (a person specifically designated by CDC to conduct identity verification or a Notary Public). Have them verify your identity and complete the Proofing Agent / Notary Section. Acceptable forms of photo ID are:
  - o State Issued Driver's License or ID Card
  - o U.S. Passport or Passport Card
  - o U.S. Military ID card
3. Fax or Mail the completed form, *along with photocopies of your identity documentation*, to the fax number or address supplied below:

**To Fax:**  
Toll Free: 877-681-2899

**To Mail:**  
Centers for Disease Control and Prevention  
Attn: Proofing Authority  
1600 Clifton Road  
MS K-94  
Atlanta, GA 30333

Once the completed form has been processed, you will receive a confirmation letter and further information regarding your access to CDC applications.

Thank you,  
CDC Proofing Authority

The screenshot also shows a Windows taskbar at the bottom with the Start button and several open applications, including Internet Explorer, Microsoft Word, and Outlook. The system clock shows 4:49 PM on 2/23/2011.



# Applicant visits proofing agent for identity verification (Step 5)

- Applicant prints out the confirmation email and the pre-populated identity verification form (found at bottom of the email) and takes it to a proofing agent
- Proofing agent may be any of the following:
  - Notary Public with valid commission
  - Badged CDC employee or contractor

## Key Points (Step 5)

- Applicant has **60 days** to complete ID verification and send all required identity verification documentation to CDC
- Proofing agent may be any of the following:
  - Notary Public with valid commission
  - Badged CDC employee or contractor

## Key Points (Step 5)

- Valid forms of ID include (one required):
  - State Issued Photo ID card (i.e. Driver's License)
  - U.S. Passport or Passport Card
  - U.S. Military ID
  - U.S. Permanent Resident Card
  - U.S. Employment Authorization Card

# Applicant sends Identity Verification Information (Step 6)

Fax or mail the completed form, along with photocopies of your notarized/verified identity documentation, to the address or fax number below:

## Fax:

877-681-2899 (toll free)

or

404-248-4183

## Mail:

Centers for Disease Control

Attn: Proofing Authority

1600 Clifton Road N.E.

Mailstop K-94

Atlanta, GA 30333

Once the completed form has been processed, you will receive a confirmation email and further information regarding your access to SAMS



# CDC Proofing Authority notifies applicant (Step 7)

- Applicant receives confirmation email of all documents received
- If necessary, CDC proofing authority contacts applicant for clarification or additional information

# Email confirmation of ID documents received (Step 7)

-----Original Message-----

**From:** CDC NCPHI Service Center Mailbox

**Sent:** Tuesday, January 12, 2010 12:22 PM

**To:** APPLICANT

**Subject:** CDC - PHIN SAMS Ticket # SD77429 has been Opened

CDC - PHIN SAMS Ticket # SD77429 has been Opened

Please **DO NOT** reply to this email, as it is an automated system-generated message. Thank you for contacting the PHIN Service Desk. Ticket # SD77429 has been created for your issue. The Service Desk will manage your ticket through to resolution. Please, contact the PHIN Service Desk with any questions about your ticket, referring to the ticket number on the email's subject line.

Thank You,  
PHIN Service Desk  
(800) 532-9929  
Email: [PHINTech@cdc.gov](mailto:PHINTech@cdc.gov)

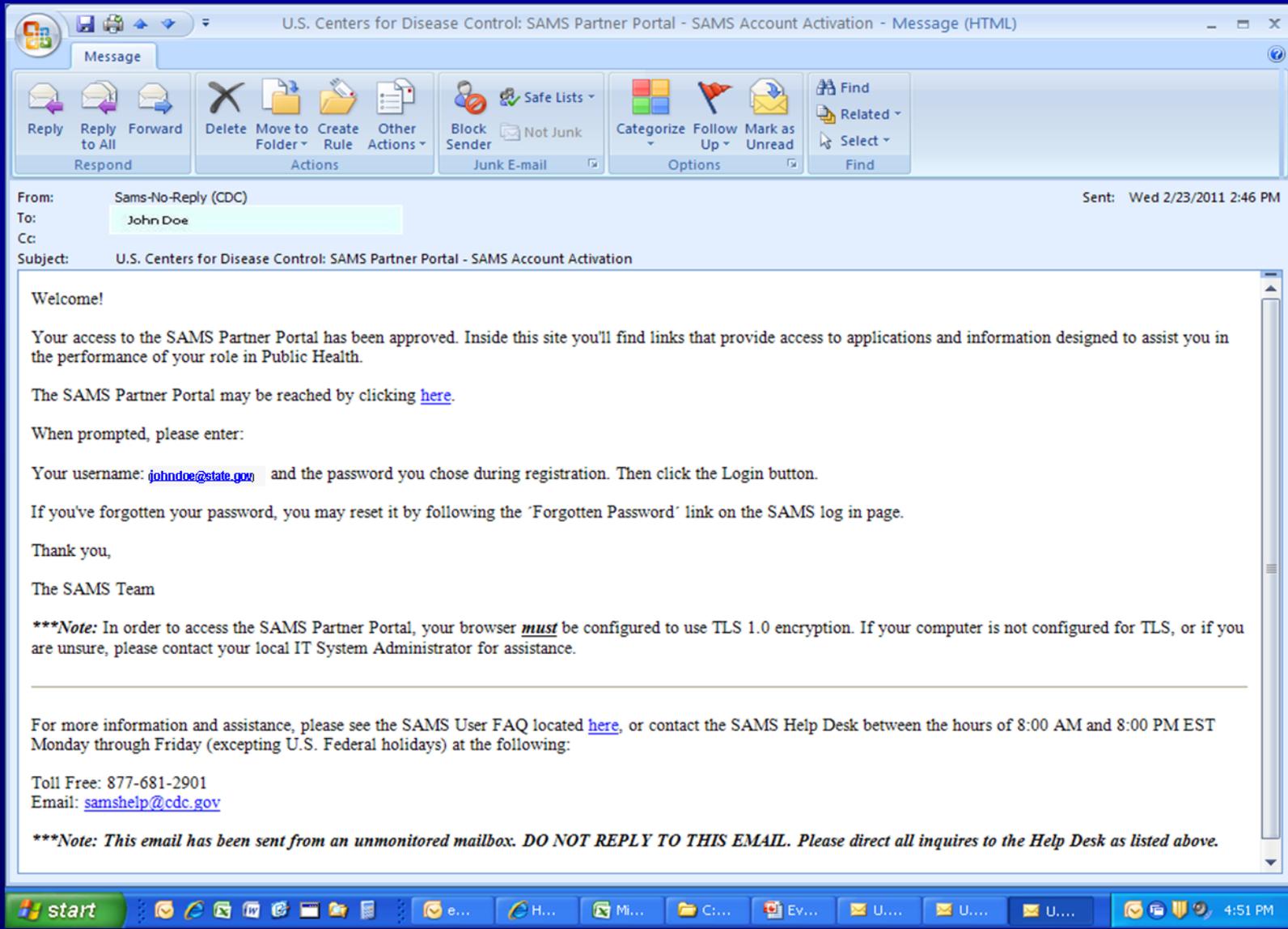
**Description:** ID Proofing paperwork received, review in process



# User receives two welcome emails from SAMS and IMATS with login instructions (Step 8)

- User (formerly known as applicant) receives two emails when they are approved:
  - Welcome to SAMS portal
  - Welcome to activity (IMATS)

# Example of the welcome to SAMS email (Step 8)



The screenshot shows a Microsoft Outlook window titled "U.S. Centers for Disease Control: SAMS Partner Portal - SAMS Account Activation - Message (HTML)". The interface includes a ribbon with "Message" selected, and various action buttons like Reply, Forward, Delete, and Move to Folder. The email header shows it is from "Sams-No-Reply (CDC)" to "John Doe" on "Wed 2/23/2011 2:46 PM".

**From:** Sams-No-Reply (CDC) **Sent:** Wed 2/23/2011 2:46 PM  
**To:** John Doe  
**Cc:**  
**Subject:** U.S. Centers for Disease Control: SAMS Partner Portal - SAMS Account Activation

Welcome!

Your access to the SAMS Partner Portal has been approved. Inside this site you'll find links that provide access to applications and information designed to assist you in the performance of your role in Public Health.

The SAMS Partner Portal may be reached by clicking [here](#).

When prompted, please enter:

Your username: [john.doe@state.gov](mailto:john.doe@state.gov) and the password you chose during registration. Then click the Login button.

If you've forgotten your password, you may reset it by following the 'Forgotten Password' link on the SAMS log in page.

Thank you,

The SAMS Team

**\*\*\*Note:** In order to access the SAMS Partner Portal, your browser **must** be configured to use TLS 1.0 encryption. If your computer is not configured for TLS, or if you are unsure, please contact your local IT System Administrator for assistance.

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For more information and assistance, please see the SAMS User FAQ located [here](#), or contact the SAMS Help Desk between the hours of 8:00 AM and 8:00 PM EST Monday through Friday (excepting U.S. Federal holidays) at the following:

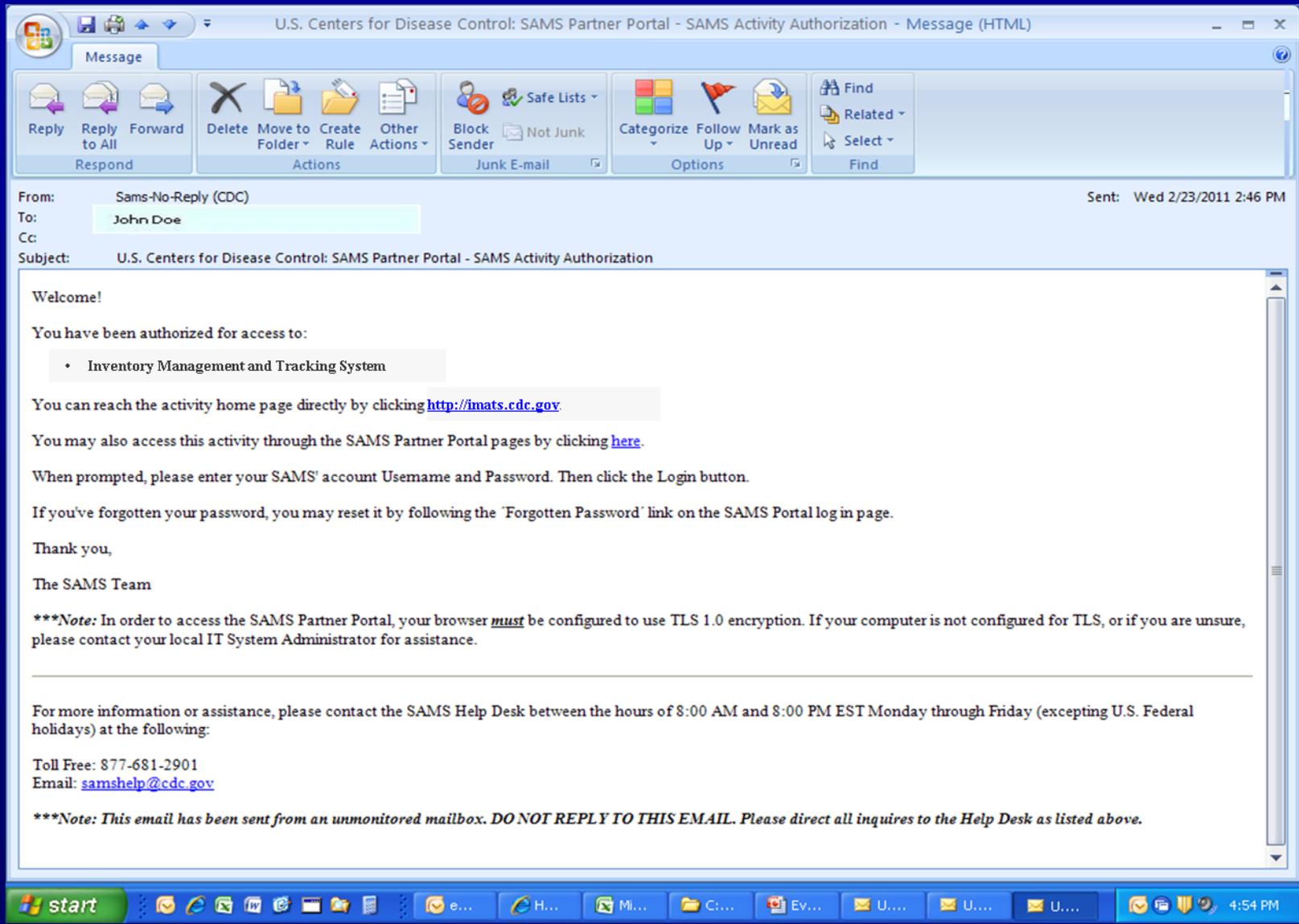
Toll Free: 877-681-2901  
Email: [samshelp@cdc.gov](mailto:samshelp@cdc.gov)

**\*\*\*Note:** This email has been sent from an unmonitored mailbox. DO NOT REPLY TO THIS EMAIL. Please direct all inquires to the Help Desk as listed above.

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 4:51 PM.



# Example of the welcome to IMATS activity email (Step 8)



The screenshot shows an Outlook window titled "U.S. Centers for Disease Control: SAMS Partner Portal - SAMS Activity Authorization - Message (HTML)". The email header includes:

- From: Sams-No-Reply (CDC)
- To: John Doe
- Cc:
- Subject: U.S. Centers for Disease Control: SAMS Partner Portal - SAMS Activity Authorization
- Sent: Wed 2/23/2011 2:46 PM

The email body contains the following text:

Welcome!

You have been authorized for access to:

- Inventory Management and Tracking System

You can reach the activity home page directly by clicking <http://imats.cdc.gov>

You may also access this activity through the SAMS Partner Portal pages by clicking [here](#).

When prompted, please enter your SAMS' account Username and Password. Then click the Login button.

If you've forgotten your password, you may reset it by following the 'Forgotten Password' link on the SAMS Portal log in page.

Thank you,

The SAMS Team

**\*\*\*Note:** In order to access the SAMS Partner Portal, your browser must be configured to use TLS 1.0 encryption. If your computer is not configured for TLS, or if you are unsure, please contact your local IT System Administrator for assistance.

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For more information or assistance, please contact the SAMS Help Desk between the hours of 8:00 AM and 8:00 PM EST Monday through Friday (excepting U.S. Federal holidays) at the following:

Toll Free: 877-681-2901  
Email: [samshelp@cdc.gov](mailto:samshelp@cdc.gov)

**\*\*\*Note:** This email has been sent from an unmonitored mailbox. DO NOT REPLY TO THIS EMAIL. Please direct all inquiries to the Help Desk as listed above.

The Windows taskbar at the bottom shows the Start button, several open applications, and the system tray with the time 4:54 PM.



# CDC Proofing Authority approves applicant (Step 9)

- Applicant receives notification via US Postal Service that their identity has been successfully verified

# Frequently Asked Questions (FAQs)

# Why do I need to present identity documents to a Proofing Agent or Notary Public?

- In order to provide individuals with access to non-public information, U.S. law *requires* the identity of potential users to be verified
- The process requirements followed by CDC have been defined by the National Institute of Standards and Technology and are required for access to all CDC non-public applications

# Is the identity verification process similar to a background check?

- No, identity verification is only used to confirm that you have registered using your true identity and that no one else is attempting to impersonate you

# The name I entered on the SAMS registration form does not match my photo ID.

## What do I do?

- You must supply, as appropriate, a legal change of name certification, marriage certificate, etc.
  - Please photocopy all required supporting materials along with your photo ID and send them with your completed form
- Questions regarding acceptable supporting documentation may be directed to CDC's Proofing Authority Help Desk at [idproofing@cdc.gov](mailto:idproofing@cdc.gov)



# The address I entered on the SAMS registration form does not match my photo ID (or photo ID doesn't contain address).

## What do I do?

- You must supply additional supporting documentation in your name such as a utility bill or voter registration card
  - Please photocopy all required supporting materials along with your photo ID and send them with your completed form
- Questions regarding acceptable supporting documentation may be directed to CDC's Proofing Authority at [idthproofing@cdc.gov](mailto:idthproofing@cdc.gov)



# How can I change my profile (e.g. phone number, address) in SAMS?

Security Access Management Services (SAMS)

Welcome Smita Chatterjee

[My Profile](#) [Logout](#)

[SAMS User Guide](#)

**My Applications**

Inventory Management and Tracking System
• <a href="#">IMATS</a>

\* Strong credentials required.

For more information or assistance, please contact the SAMS Help Desk between the hours of 8:00 AM and 8:00 PM EST Monday through Friday (excepting U.S. Federal holidays) at the following:  
Toll Free: 877-681-2901  
Email: [samshelp@cdc.gov](mailto:samshelp@cdc.gov)

https://im.cdc.gov/idm/sams/imcss/index.jsp

# Can I get deactivated in IMATS?

- Because IMATS is dependant on SAMS for its end user authentication and access control maintaining your SAMS account is critical. SAMS will enforce 60 day mandatory password resets and should be accessed, at least once, in every 12 month period. **If you have not logged in to SAMS for over 365 days from the last successful login, your SAMS account will be terminated**
- If you are terminated in SAMS but still require access to IMATS you will be required to go through the full registration process including identity proofing

# I registered with SAMS a week ago but have not received an email containing the identity verification form. Why not?

- Your SPAM filter may have blocked the email. Check with you state/local IT system.
- If you have not received the identity verification email, request it be resent to you by contacting the SAMS Help Desk:
  - Toll Free SAMS Helpdesk Phone: **800-532-9929**
  - SAMS Helpdesk email: **[samshelp@cdc.gov](mailto:samshelp@cdc.gov)**

# If I am in SAMS, can I automatically access other Secure Data Network (SDN) applications that require digital certificates?

- SAMS is the next generation replacement for CDC's legacy SDN portal. Applications currently operating under SDN will begin to transition over to SAMS
- Current SDN users cannot access SAMS protected applications without completing SAMS Identity Proofing
- Fortunately, due to SAMS' role as a common enterprise portal, users will only be required to complete each process once, regardless of the number of applications they use



# Can I access multiple applications protected by SAMS without having to re-register/proof?

- Yes, you will have access to multiple applications via a single SAMS account
- If a user requires access to an application with an equal or lower security rating than their currently approved SAMS security access level, they can be immediately granted access
- User's requiring access to a protected application with a higher security rating than is currently assigned will have to satisfy the associated Identity Verifications requirements mandated by the application with the higher security level before being granted access.
  - IMATS is an E-Auth Level 2 application. As a result, if you require access to another applications protected by SAMS with an E-Auth rating of 1 or 2 you do not need to repeat the registration process. If you require access to a Level 3 rated application some additional Identity Proofing requirements will need to be satisfied before access is granted.



# IMATS User Registration Webinar

Recorded Webinars and slide set  
will be available soon

Thank you for your time!

IMATS Questions?

Email: [ctshelp@cdc.gov](mailto:ctshelp@cdc.gov)

