National Healthcare Safety Network & Secure Access Management Services (SAMS)

Beta Pilot Kick-Off Meeting

NHSN SAMS Team

June 26, 2013
Agenda

The purpose of this meeting is to:

- Provide an overview of the Secure Access Management Services (SAMS) process
- Discuss requirements for Beta Pilot participation and migration to SAMS from SDN
- Address any outstanding questions or concerns
### NHSN SAMS Project Overview

#### SAMS Project Purpose
- Started in 2010 as a way to migrate all NHSN users from the secure data network (SDN) to the secure access management services (SAMS). This effort will:
  - eliminate the need for digital certificates
  - streamline the gateway to the NHSN application, and
  - make the program compliant with CDC security requirements

#### Project Goals
- Put an infrastructure in place to support user migration and anticipated onboarding users
- Modify internal processes and workflows, where appropriate
- Ensure delivery of consistent messaging to the NHSN user community
- Conduct pilot studies to determine velocity
- Successfully migrate NHSN user community

#### Beta Pilot Success Factors
- All pilot participants have completed the migration process, including participation in the post mortem activity
- If you’re asked a question about the pilot that we didn't cover today, please direct questions to the NHSN Help Desk, subject ‘SAMS Beta Pilot’

#### Communications Strategy
- For the pilot, all communications should continue to go to the NHSN Help Desk, subject ‘SAMS Beta Pilot’
- This includes, but is not limited to, issues questions about process, etc.
- All feedback will be used to improve the onboarding process
What is SAMS?

- Secure Access Management Services (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.
- Simply stated, it is a gateway by which CDC applications can be accessed.
- Modifications to your computers are *not* necessary to access SAMS.
SAMS Gateway

SAMS should be considered the method by which NHSN is accessed.

Current State for NHSN

Future State for NHSN

Once migrated to SAMS, it is the only way to access NHSN.
SDN’s New Role

- Currently, the Secure Data Network (SDN) is used to access CDC applications.
- Once migration to SAMS is complete, SDN can no longer be used to access the NHSN application.
- SDN, however, can still be used to access other CDC applications e.g., Epi-Info, etc.
- For the sake of the pilot, you will retain access to NHSN via SDN during the migration period.
What migration is not...

- Your access within the NHSN application will not change, which means:
  - **NO** impact to settings and your role
  - **NO** impact to conferred rights
  - **NO** impact to data sharing
  - **NO** impact to CDA
  - **NO** impact to *how* you navigate within the application

Like SDN, SAMS is a ‘separate’ application its only function is to connect you to the NHSN application.
Accessing the NHSN application via SAMS is different from SDN as such you will:

- Receive an invitation by email to start the registration process
- Need to verify your identity – this is not a background check
- Receive several email correspondences from SAMS to get you started
- Be issued a SAMS grid card that will be mailed to your home address
- Be expected to maintain a password

Once you’ve registered and have verified your identity, getting into the NHSN is relatively straightforward.
The SAMS Registration Process

GETTING ‘SAMIFIED’
SAMS Registration Process

- Receive an email invitation from SAMS inviting you to register
- Log in SAMS with your username (email address) and the temporary password that was provided in the SAMS invitation email
- Accept the SAMS Rules of Behavior, enter registration data, define a new password, and create 5 security questions
- Receive email confirming your registration with SAMS
- Print out the identity verification form and take it to a notary public with an appropriate form of ID for verification
- Mail or fax the endorsed identity verification form, copy of identification provided (e.g., drivers license), and copies of any supporting documentation to CDC proofing authority
- Receive notification from CDC proofing authority that documentation was received
- Receive from CDC proofing authority via US Postal Service that review of identity form was completed
- Receive welcome emails from SAMS
- Receive SAMS grid card delivered to your home address
Receive Invitation by SAMS (Step 1)

- The email you receive from “Sams-No-Reply (CDC)” contains a link to the SAMS website where you will register for access
- This email will provide you with a username and temporary password to start the registration process

National Healthcare Safety Network: NHSN Reporting
Step 1 Ctd - SAMS Invitation Email

- Scroll down the email and you’ll find the link for registration, your username and a temporary password.
Step 1 – Key Points To Remember

- 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.
- Please check your spam email folder if you haven’t received the email invitation.
- For typical users, there is a **30-day** SAMS registration window. A reminder is sent on the 15th and the 25th day.
- For typical users, after **30 days** you will be removed and will have to be invited again.
Log in SAMS (Step 2)

- Enter the username and password from the email to access SAMS
Accept Rules of Behavior (Step 3)

• Read and accept the SAMS Rules of Behavior
Step 3 Ctd – Complete Registration

- Complete the registration form
Step 3 Ctd – Complete Registration

• Within the form you create your own password
Step 3 – Key Points To Remember

- It is very important to complete the SAMS registration fields **exactly** as the information appears on the form of ID you intend to use.

- Failure to do so may result in:
  - Requests for more information or clarification
  - Approval not being granted
Receive confirmation email (Step 4)

- You will receive a confirmation email to fulfill the identity verification requirement
- You will print the confirmation email and the attachment at the bottom and take to a notary public
Step 4 – Key Points To Remember

- Notary should endorse using their commission/stamp

- Typical users will have **60 days** to complete ID verification and send all required identity verification documents to the CDC
Send Documentation to CDC (Step 5)

- Mail or fax the endorsed identity verification form, copy of identification provided (e.g., drivers license), and copies of any supporting documentation to CDC proofing authority

  Fax:
  Toll Free Fax Number: 877-681-2899

  Mail:
  Centers for Disease Control
  Attn: Proofing Authority
  1600 Clifton Road N.E.
  Mailstop K-94
  Atlanta, GA 30333

- When sending the form to CDC, two forms of ID must be presented; one unexpired document from List A and one additional unexpired document from List B

<table>
<thead>
<tr>
<th>List A - Primary Photo ID</th>
<th>List B - Secondary ID</th>
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<tbody>
<tr>
<td>Driver's license or ID card issued by a state or outlying possession of the US</td>
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<tr>
<td>U.S. Passport or U.S. Passport Card</td>
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<tr>
<td>U.S. Military ID</td>
<td>U.S. Military ID</td>
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<tr>
<td>U.S. Permanent Resident Card</td>
<td>U.S. Permanent Resident Card</td>
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<tr>
<td>Employee ID Card issued by your organization that includes:</td>
<td>Employee ID Card issued by your organization that includes:</td>
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<tr>
<td>- Your name</td>
<td>- Your name</td>
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<tr>
<td>- Your organization name</td>
<td>- Your organization name</td>
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<tr>
<td>- Your photo</td>
<td>- Your photo</td>
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<tr>
<td>State-issued Voter ID or Registration Card</td>
<td>State-issued Voter ID or Registration Card</td>
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<tr>
<td>Certification of Birth Abroad issued by the U.S. Department of State</td>
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<tr>
<td>Original or Certified copy of birth certificate issued by state, county, municipal authority, or territory of the U.S. bearing an official seal</td>
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<tr>
<td>U.S. Social Security Account Number Card</td>
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Confirmation Documents Received (Step 6)

- Once the completed form has been processed, you will receive a confirmation email and further information
- Please note that the email confirmation do not come from SAMS-No-Reply, instead it is from CDC NCPHI Service Center Mailbox

-----Original Message-----
From: CDC NCPHI Service Center Mailbox
Sent: Tuesday, January 12, 2013 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

Description: ID Proofing paperwork received, review in process
CDC Approves (Step 7)

- You will receive notification via US Postal Service that your identity has been successfully reviewed (success or failure).
- You will not receive a notification if you are removed in 60 days and do not complete this step.
- Many times notification is received after the user account has already been activated.
- You will receive two emails upon approval:
  - Welcome to SAMS portal
  - Welcome to NHSN (activity)
Step 7 Ctd – CDC Approves

- SAMS approval means that you have access to SAMS

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**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](https://cdc.gov).

When prompted, please enter:

Your username: [@cdc.gov](https://cdc.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

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**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 User FAQ located [here](https://cdc.gov), 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: sams help@cdc.gov

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**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.
Step 7 Ctd – CDC Approves

- NHSN approval means that you can access NHSN through the SAMS portal

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National Healthcare Safety Network: NHSN Reporting

Welcome!

You have been authorized for access to:
- Evaluation Web: Evaluation Web Level 2

You can reach the activity home page directly by clicking [www.xpems.com](http://www.xpems.com).

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.***

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 (excluding U.S. Federal holidays) at the following:

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Issued a SAMS Grid Card (Step 8)

- To support authentication a physical card is mailed to each NHSN user
- The card is mailed to your home address so what’s provided during registration must be accurate.
- Despite receiving the ‘Welcome email’ you cannot access NHSN until you receive the card. Access to the SAMS portal is possible with just username/password
- Grid cards are typically issued one to two business days after activation. Mail varies but it usually takes a maximum of 5 days for most locations
- Grid cards are already activated when received. No additional steps are required before use.
- For questions or help about the grid card contact: samshelp@cdc.gov
Step 8 Ctd – Issues a SAMS grid card

Front

Back

<table>
<thead>
<tr>
<th>Serial #</th>
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<tbody>
<tr>
<td>1 6 C M 3 4 T N M 8 K</td>
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<td>2 E 0 4 8 W N N K 0 J</td>
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<td>3 4 V 1 K P H T V O E</td>
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<tr>
<td>4 0 8 4 1 M Q W H X D</td>
</tr>
<tr>
<td>5 5 8 K 2 T P E 2 7 5</td>
</tr>
</tbody>
</table>
Step 8 Ctd – Issues a SAMS grid card

• Now, you’ll use the SAMS Grid Card Credentials entry for access
Where the rubber meets the road

BETA PILOT
NHSN SAMS Beta Pilot

The Beta Pilot:
- Unpaid, voluntary opportunity
- Will migrate select facilities
- Allows us to determine velocity
- Gather external feedback about migration for process improvement
- Actual involvement is less than a day

The following activities should occur on these days:

- **6/28/13**
  - NHSN team will send invitation to SAMS

- **7/1 - 7/12**
  - Complete registration verification form and get it notarized

- **7/16/13**
  - Fax in your forms

- **8/2/13**
  - Send us an email noting:
    - When card was received
    - The date you accessed NHSN
    - Your overall experience
During the Beta Pilot, and even beyond for a limited time, you will retain access to NHSN via SDN, especially during the next CMS deadline.

You will be notified after 8/30 that your SDN access for NHSN has been removed.

If your digital certificates come up for renewal during this period, renew them.

For any issues, questions or suggestions, please send correspondences to the NHSN Help Desk email box with the subject line, ‘SAMS Beta Pilot’ nhsn@cdc.gov