

CMS Employees and Contractors How-to Guide

Connecting to the CMS Virtual Desktop



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OVERVIEW

CMS Citrix Virtual Apps and Desktops portal (<https://vdi.cms.gov>) is an application store that provides an interface for users to access virtual applications and desktops remotely using any endpoint including personal laptops, desktops, tablets, and mobile devices. It allows users to access virtual environment both internally and externally by utilizing Citrix NetScaler Gateway. It also provides multiple authentication methods such as Okta (Verify/Google Authenticator/SMS Authentication, E-mail Authentication, Voice Authentication) and Smart Card. It interacts with the Citrix Workspace App (Receiver) to support access to virtual applications and desktops from multiple platforms such as PC Windows, Mac OS X, Apple iOS, Google Android, Linux, and HTML5 endpoints.

This guide provides instructions on how to access and navigate Citrix Virtual Apps and Desktops portal, as well as basic troubleshooting tips.

USER ACCESS REQUEST

To gain access to the CMS VDI you must request EUA Job Codes. The Job Codes can be requested from the CMS IT Service desk. Once the access has been requested, approved, and granted, you should be able to log on to <https://vdi.cms.gov> and access virtual apps and desktops that you have available.

Citrix Workspace App Download and Installation Steps

Using the table below, download the client from the appropriate location point based upon the type of device you are using.

Device Type	Installation Point
CMS-issued PC <i>A CMS-issued PC is joined to a CMS domain and has the required security components installed (McAfee Anti-virus, etc.).</i>	Citrix Workspace App should be requested via the CMS IT Service Desk at 410-786-2580 or 1-800-562-1963
All other non-CMS-issued PCs	https://www.citrix.com/downloads/workspace-app/windows/
CMS-issued Mac <i>A CMS-issued Mac is joined to a CMS domain and has the required security components installed (McAfee Anti-virus, etc.).</i>	Citrix Workspace App is preinstalled on CMS managed Mac computers.
All other non-CMS-issued Macs	https://www.citrix.com/downloads/workspace-app/mac/ Follow steps in section 'Non-CMS-issued Mac' to install it

Table. Device type and corresponding Citrix Receiver installation point

PC

1. If you are running Windows, click on **Citrix Workspace app (current version) for Windows** link.
2. On the popup Run the CitrixWorkspaceApp and install. Select Continue

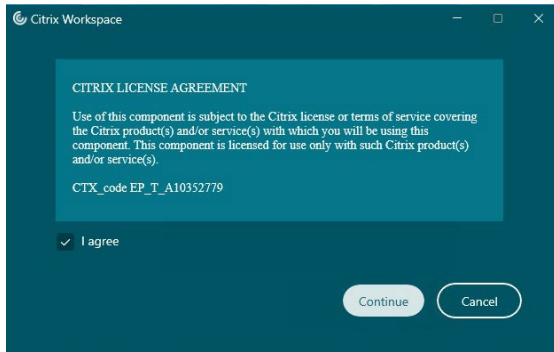


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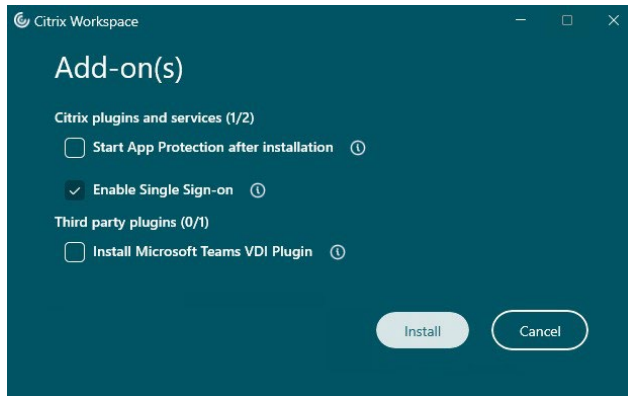
Connecting to the CMS Citrix Virtual Desktop



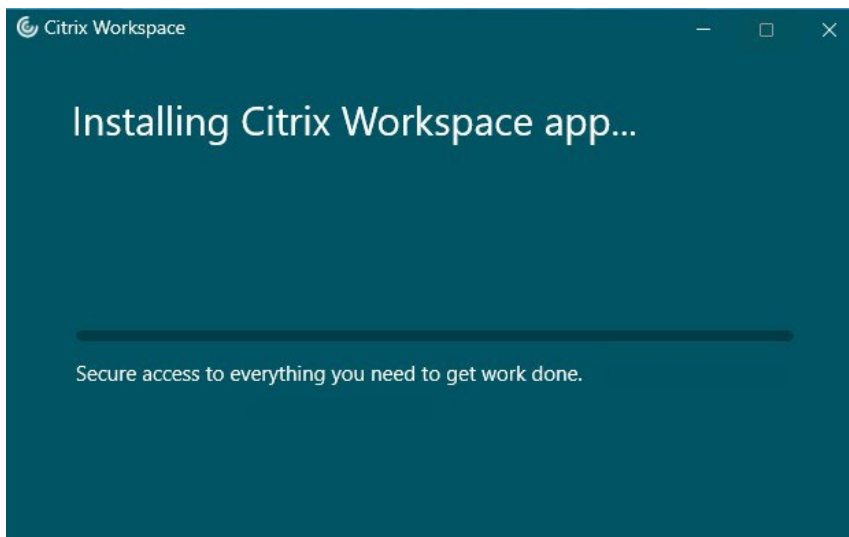
3. Accept License Agreement and click **Continue**.



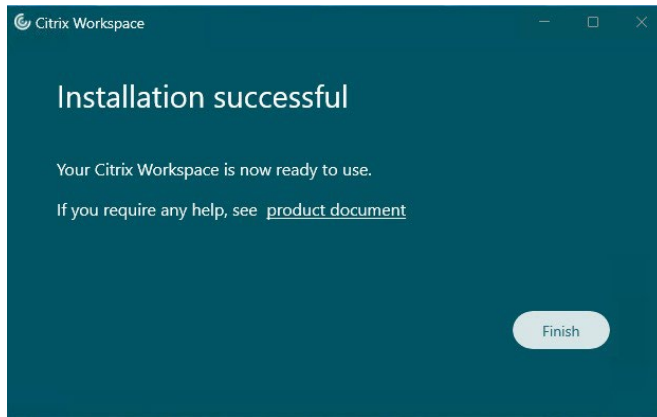
4. Select Enable single sign-on then **Install**.



5. Workspace is now installing.

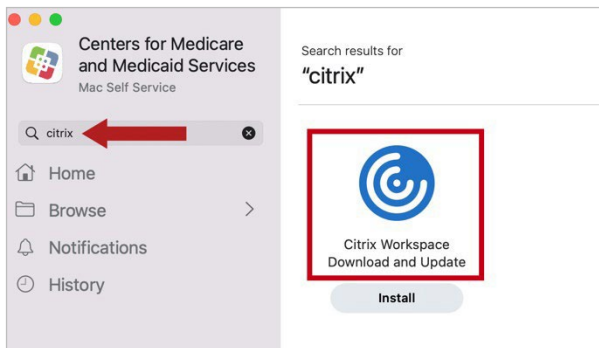


6. Click **Finish**.

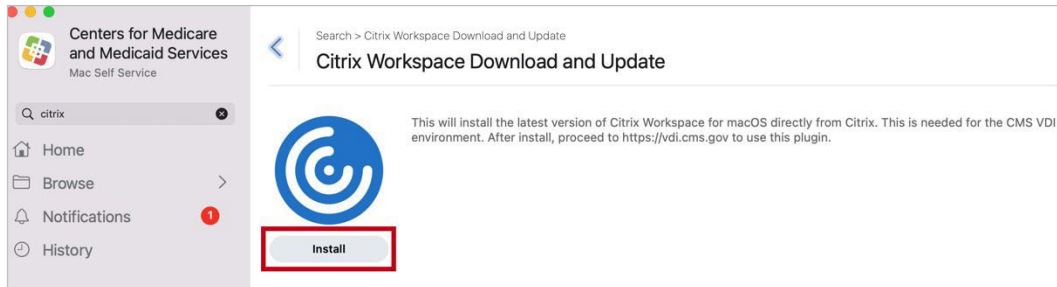


Mac – CMS-Issued Device

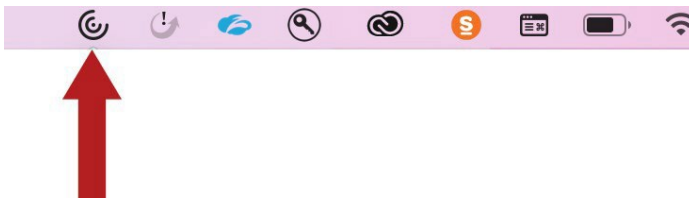
1. Open the Self-Service app on your Mac and search for **Citrix**.



2. Click on the **Citrix Workspace Download and Update** entry, then click **Install**. This will take a minute or two to complete.



3. Once the install is complete, you should have the Citrix Workspace app appear in the Menu Bar at the top right of your desktop. There's no need to open this yet.



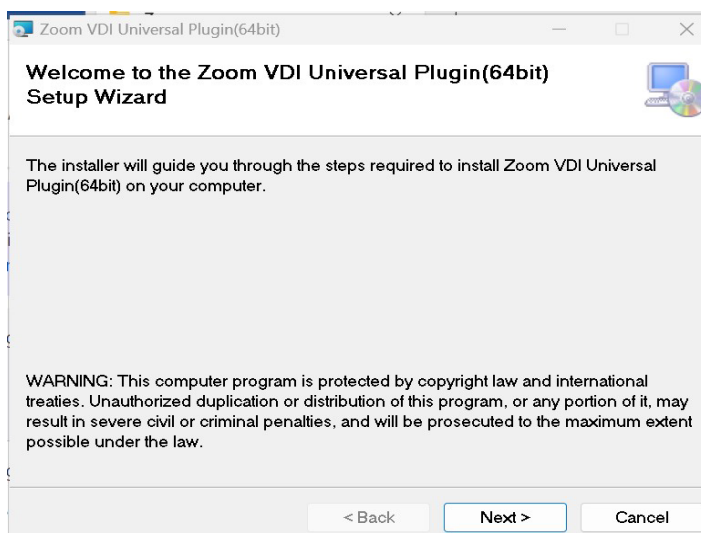
Mac – Non-CMS-Issued Device

1. Download Citrix Workspace app for Mac (the .dmg file) from <https://www.citrix.com/downloads/workspace-app/mac/> and open it.
2. On the Introduction page, click **Continue**.
3. On the License page, click **Continue**.
4. Click **Agree** to accept the terms of the License Agreement.
5. On the Installation Type page, click **Install**.

Zoom Plugin for VDI Download and Installation Steps (Windows)

To use Zoom in a VDI session, the Zoom Citrix HDX Media Plugin needs to be installed on the computer from which the VDI is being accessed. Follow the instructions below to download and install it.

1. Download and save the installation files by clicking the following link or entering it into a web browser: <https://vdiidap.cms.gov/logon/ZoomCitrixHDXMediaPlugin.msi>
2. Double click on the downloaded file. (This will appear in the downloads folder on your computer.) On the Zoom VDI Universal Plugin window, click **Next**.

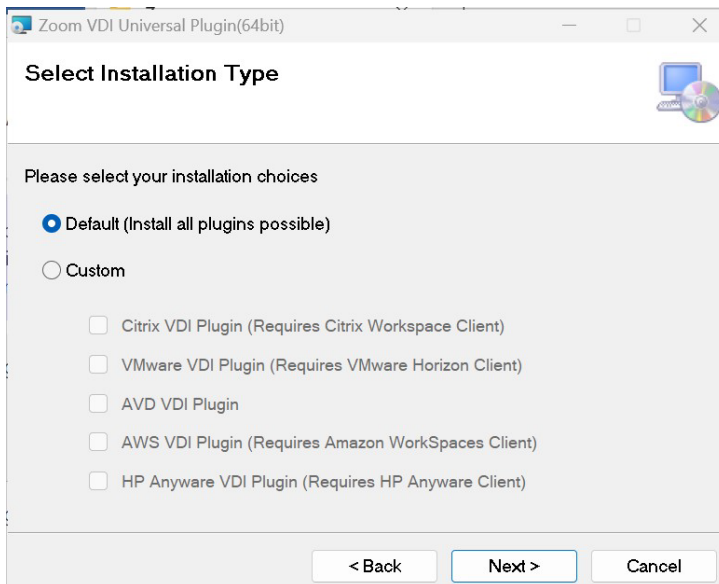


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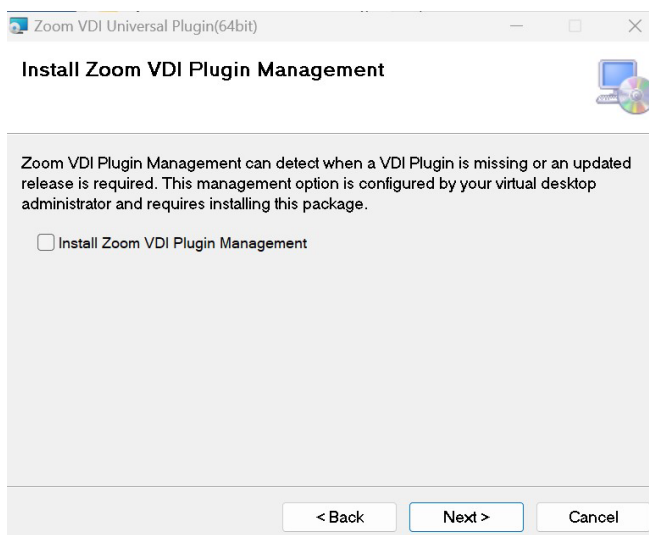
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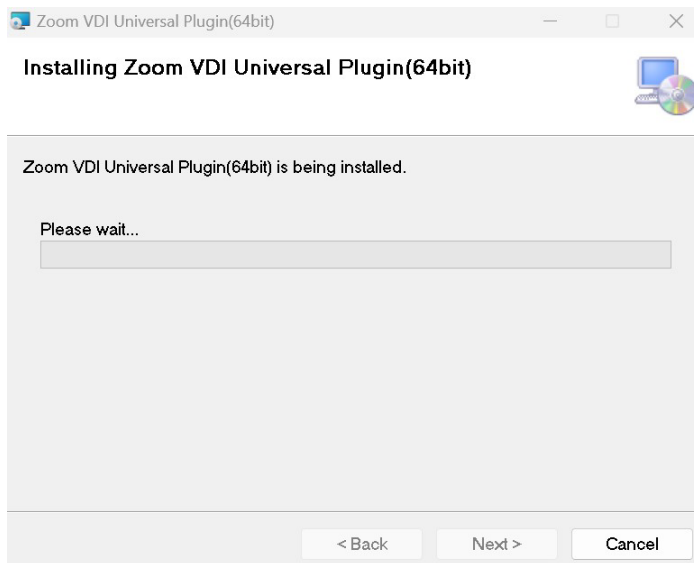


3. Leave default settings click **Next**.

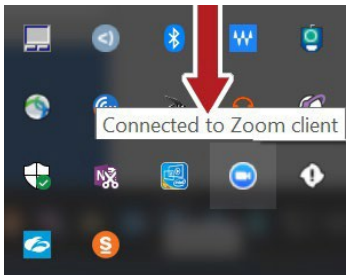


4. Uncheck the “Install Zoom VDI Plugin Management” Click **Next**.





5. Zoom VDI Plugin icon should now be visible in the taskbar once the VDI session is started. If you hover your mouse over the icon, it should say Connected to Zoom Client.



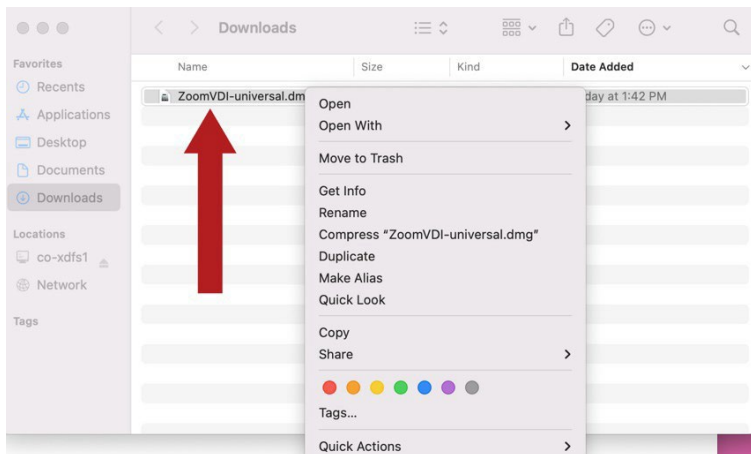
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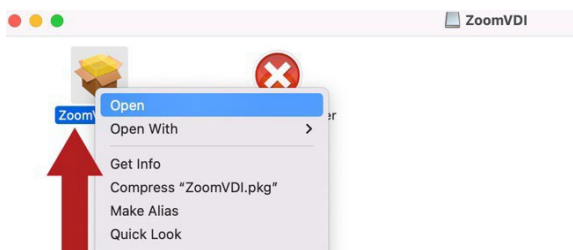
Zoom Plugin for VDI Download and Installation Steps (Mac)

To use Zoom in a VDI session, Zoom Citrix HDX Media Plugin needs to be installed on a computer from which VDI is accessed. Follow the instructions below to download and install it.

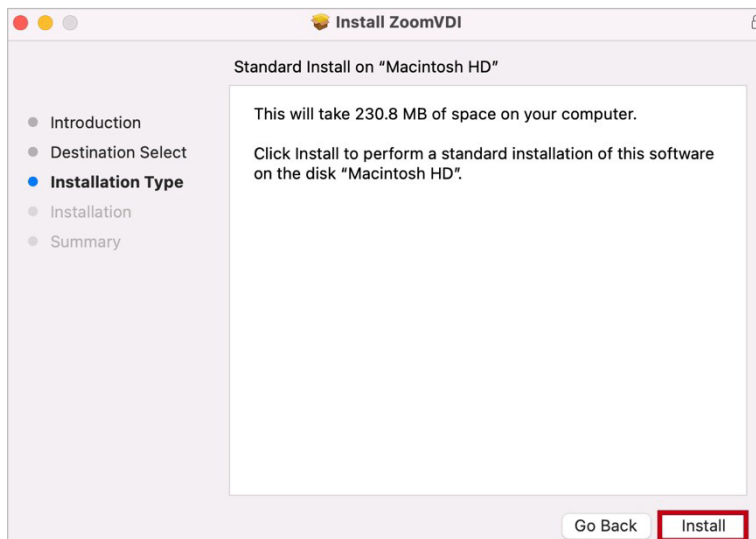
1. Download and save the installation files by clicking the following link or entering it into a web browser: <https://vdildap.cms.gov/logon/ZoomVDI.universal.pkg>
2. Go to the **Downloads** folder and double click on the **ZoomVDI-universal.dmg** file.



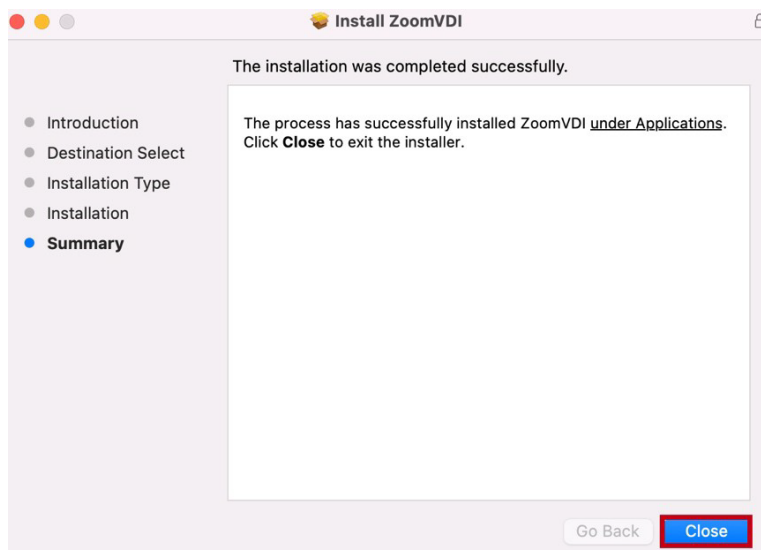
3. Double click **ZoomVDI.pkg**



4. Click **Install**.



5. Click **Close**.



OKTA MULTI-FACTOR AUTHENTICATION (MFA) INITIAL SETUP

Follow the instructions at <https://home.idm.cms.gov> to setup Okta Verify Authentication.

Note that in order to be able to sign in with PIV card, you will first need to register with Okta by using your CMS User ID and password.

LOGIN PROCESS

There are two authentication methods available to access CMS VDI environment – Okta and Smart Card (PIV). In order to use Okta, please follow instructions in section ([Okta Multi-Factor Authentication \(MFA\) Initial Setup](#)) to set it up.

Please note the following:

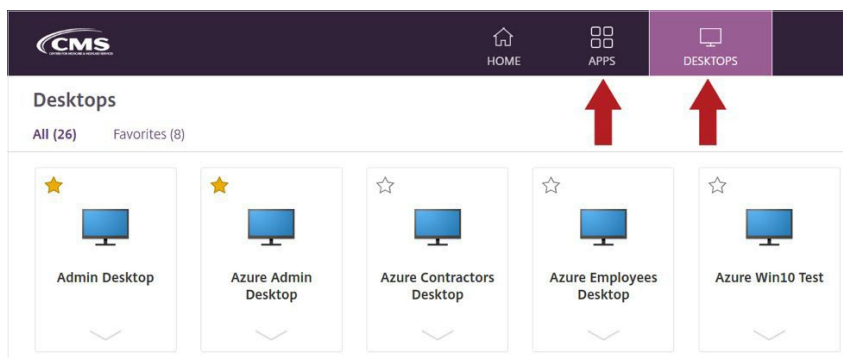
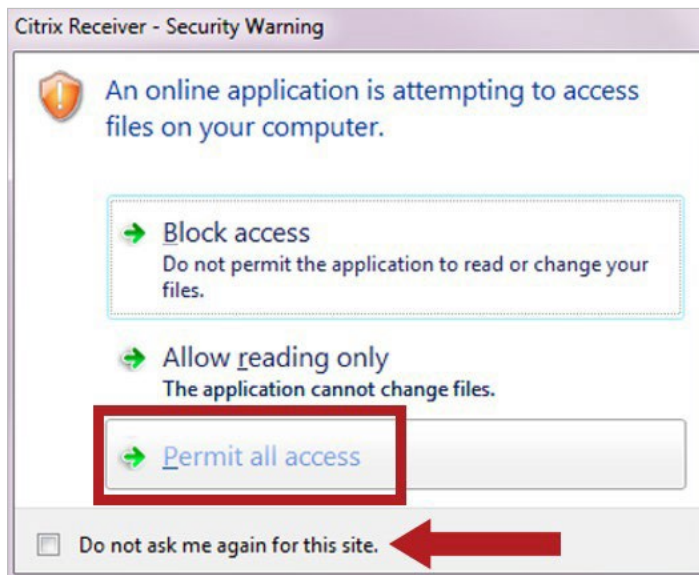
- **If you are logging into CMS VDI via Okta for the first time and would like to use PIV, you will need to first log on with your email address and password. Once you were able to log on with email and password, you should be able to use your PIV at any subsequent logon.**
- If you are logging in from within CMS network, you will not get prompted for Okta MFA. Once you enter your CMS email address and password, it will automatically log you into the CMS VDI portal.
- The logon steps will vary depending on the browser used to access the portal.
- If you are accessing virtual desktop or virtual app for the first time it will take longer to load in order for your new user profile to be created.

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Connecting to the CMS Citrix Virtual Desktop



- If you are accessing virtual desktop or virtual app for the first time, you may receive the following message. First, check the box next to **Do not ask me again for this site** and then click on **Permit use**. This message is asking if you will allow the virtual desktop or application to access resources that are local to your device, such as drives, printers, speakers, webcams etc.



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Connecting to the CMS Citrix Virtual Desktop



Microsoft Edge and Google Chrome

1. Browse to <https://vdi.cms.gov/> and click on **Sign In** button.
2. If you are using Okta then type your CMS email address and password and click **Sign In**.

A screenshot of the CMS.gov Identity Management Sign In page. The page has a white background with a blue header bar at the top. The header bar contains the CMS.gov logo and the text "Identity Management". Below the header, the page is titled "Sign In". There are two input fields: "User ID" and "Password". The "Password" field has a small eye icon to its right. Below the input fields is a checkbox labeled "Agree to our Terms & Conditions". Below the checkbox is a blue button labeled "Sign In". Below the button is a horizontal line with the text "OR" in the center. Below the line is a button labeled "CMS PIV Card Only". Below the buttons is a paragraph of text: "PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login." Below the paragraph are two links: "Forgot Password" and "Unlock Account".

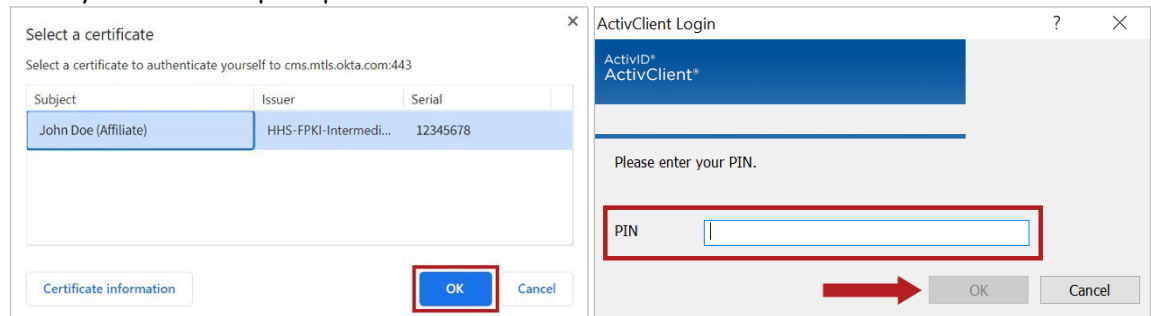
3. Depending on what authentication method you have configured in Okta, you will need to respond accordingly on the next screen: Verify (use a push notification sent to the mobile app), Google Authenticator (enter single-use code from mobile app), or SMS Authentication (enter a single-use code sent to your mobile phone). Once authenticated, please go to step #5 below.
4. If you are using PIV card, click on **Sign in with CAC / PIV card** button at the bottom of the screen and you will be prompted with certificate information. Click **OK** to confirm your PIV certificate,

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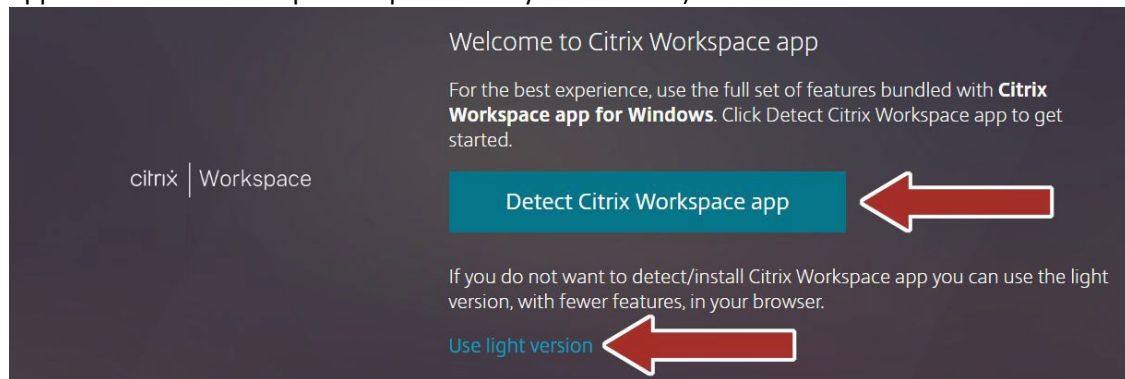
Connecting to the CMS Citrix Virtual Desktop



enter your PIN when prompted and click **OK**.



- Click on **Detect Receiver** button. (Note that you can also click on **Use light version** (HTML5) if Citrix receiver is not installed on your computer or you experiencing issues with it. In this case, applications and desktops will open within your browser).

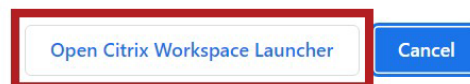


- Click Always allow check box then **Open Citrix Workspace Launcher** on the following popup message. If you click **Cancel** you will be presented with screen showing in the next step.

Open Citrix Workspace Launcher?

https://vdildap.cms.gov wants to open this application.

☐ Always allow vdildap.cms.gov to open links of this type in the associated app

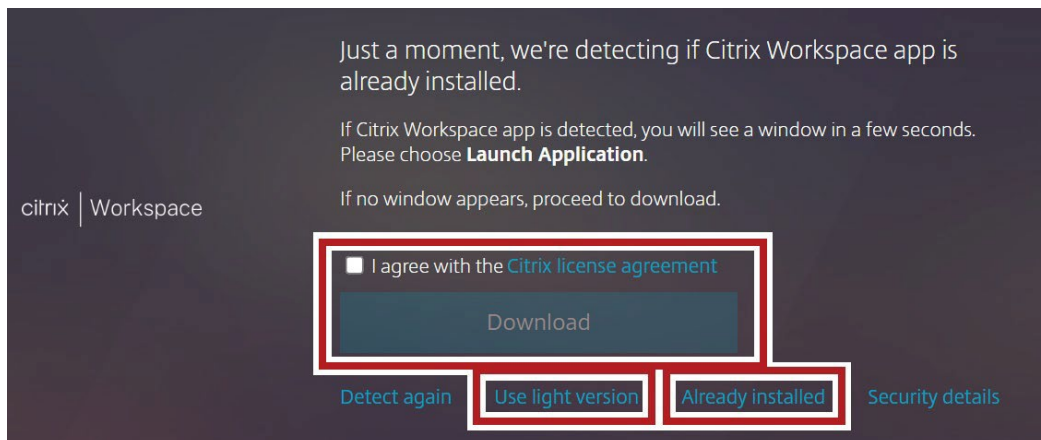


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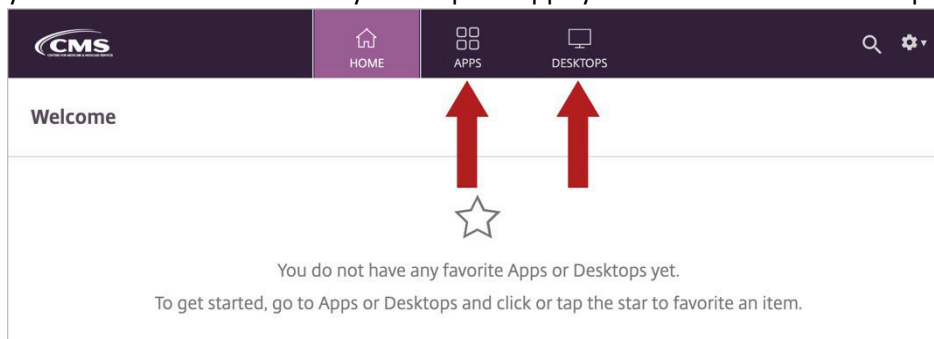
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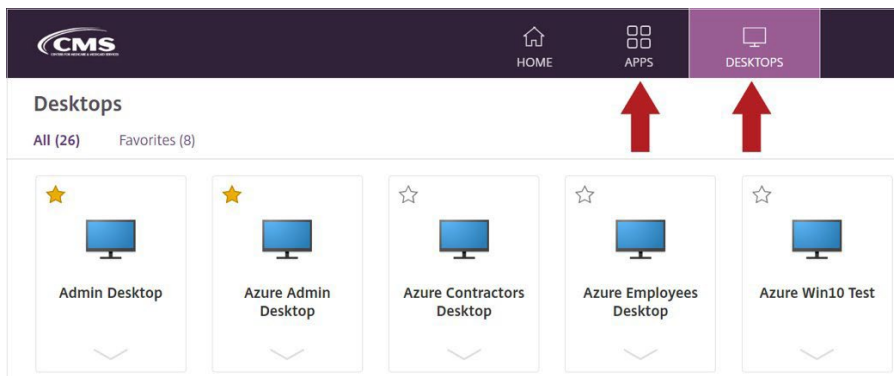
7. If Workspace App is already installed on your PC, select **Already installed**. Otherwise, you have the option use Light version (HTML5). **DO NOT DOWNLOAD Workspace from this site use the Citrix site provided above.**



8. Once logged in you will be presented with the following Storefront screen. You can find desktops and apps that you have access to under Desktops and Apps tabs. Please note that if you do not have access to any desktops or apps you will not see their corresponding tabs.



9. Click on **Desktops (or Apps)** tab and then click on **Desktop (or Apps)** icon to launch it.

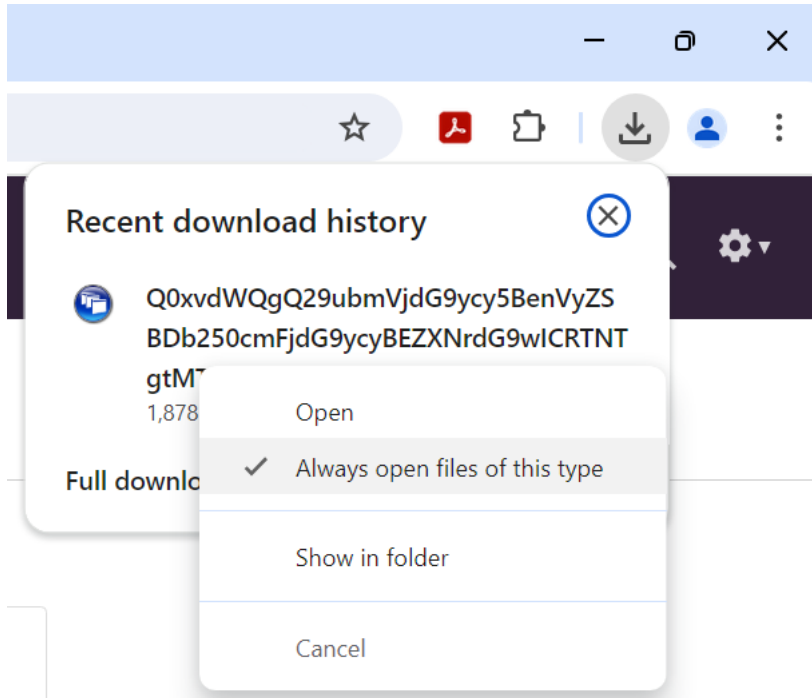


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10. The .ica file will be downloaded and you should see it at the bottom left corner of the browser. Right-click on it and select **Always open files of this type** and then select **Open file**.



11. Click **OK** to the disclaimer when prompted and once the logon process completes, you should see your virtual desktop (or application).

Mozilla Firefox

1. Browse to <https://vdi.cms.gov/> and click on **Sign In** button.
2. If you are using Okta, then type your CMS email address and password and click **Sign In**.

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Connecting to the CMS Citrix Virtual Desktop



CMS.gov | Identity Management

Sign In

User ID

Password

☐ Agree to our [Terms & Conditions](#)

Sign In

OR

[CMS PIV Card Only](#)

PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.

[Forgot Password](#)

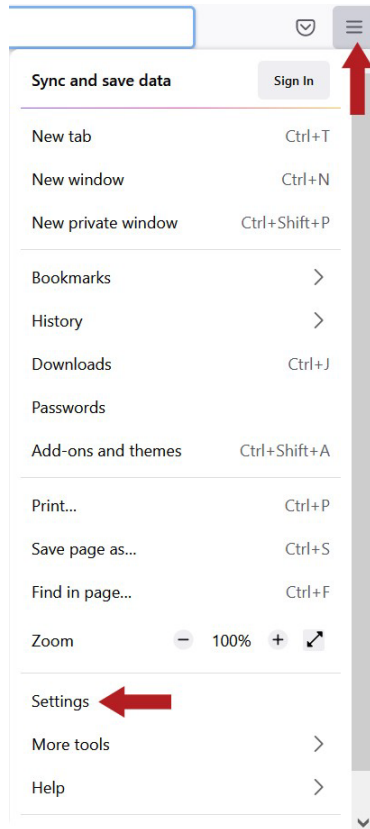
[Unlock Account](#)

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3. Depending on what authentication method you have configured in Okta, you will need to respond accordingly on the next screen: Verify (use a push notification sent to the mobile app), Google Authenticator (enter single-use code from mobile app), or SMS Authentication (enter a single-use code sent to your mobile phone). Once authenticated please go to step #5 below.
4. If you are using PIV, you will need to configure your card reader in Firefox.
 - a. Open Menu and select **Settings**.

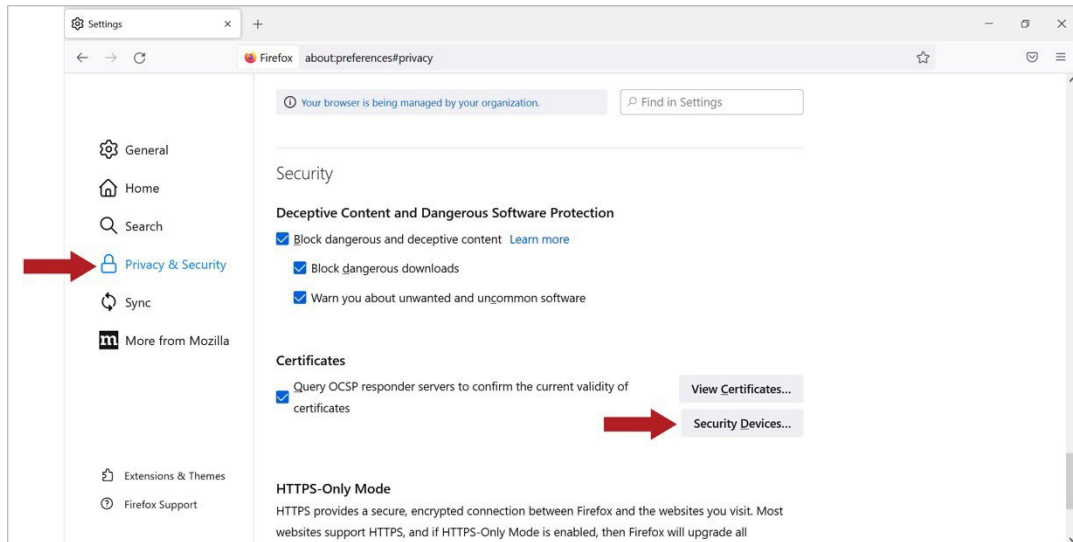


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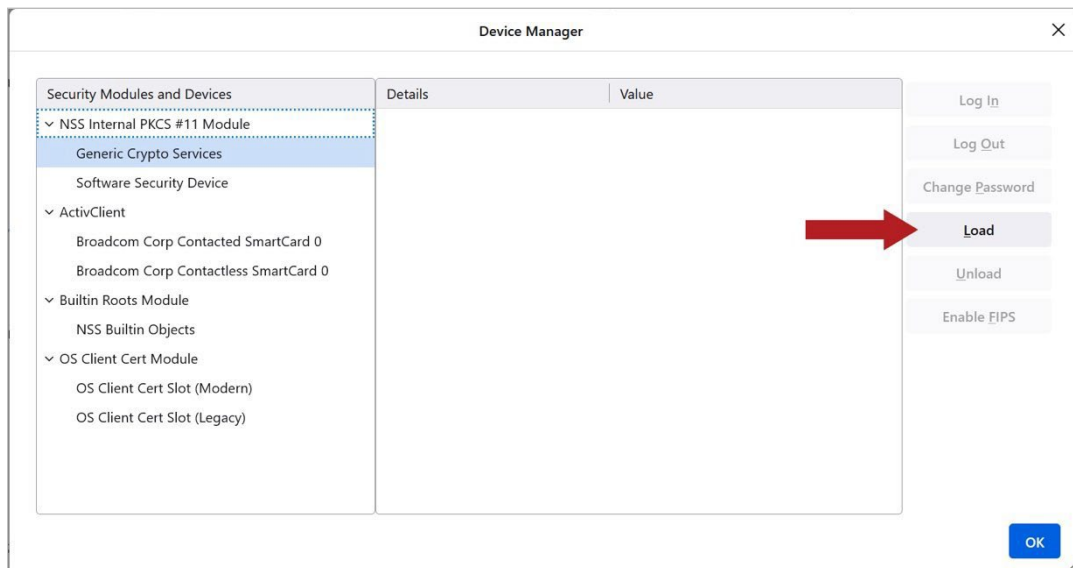
Connecting to the CMS Citrix Virtual Desktop



- b. Select **Privacy & Security**, scroll down, and click on **Security Devices** button at the bottom of the screen.



- c. In Device Manager dialog box, click **Load** and then **Browse**.

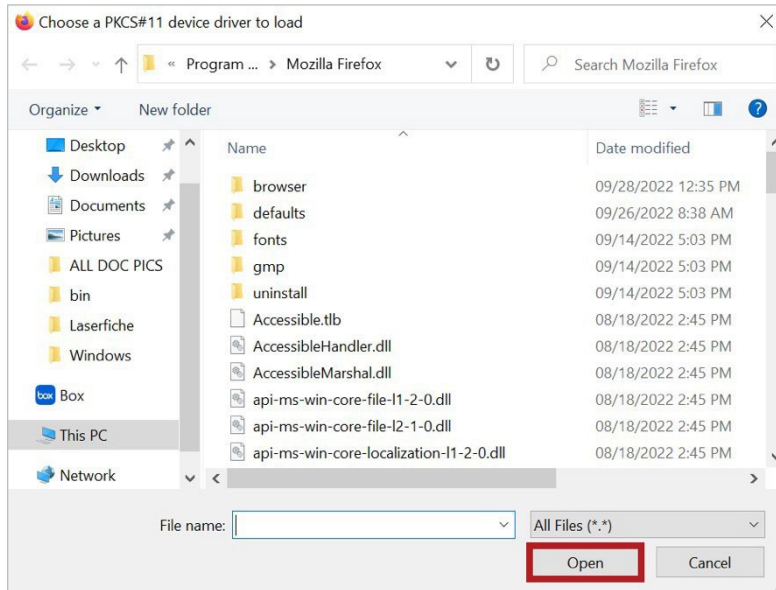


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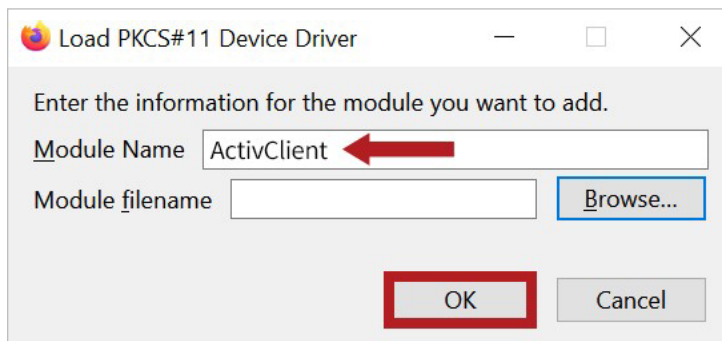
Connecting to the CMS Citrix Virtual Desktop



- d. Browse to the location of your card reader folder, select the proper .dll (in this case apkcs211.dll), and click **Open** (the screen below shows location of ActivClient that is part of the CMS image). If you are accessing from non-CMS laptop you will need to find out what is a proper .dll file for your card reader.



- e. Type the name of the module, (in this case ActivClient), and click **OK**.

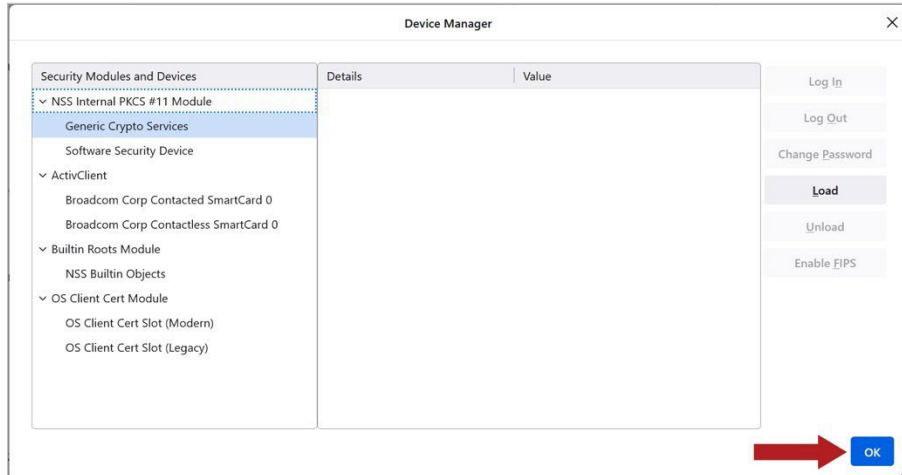


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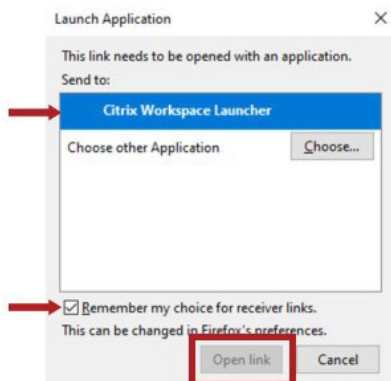
Connecting to the CMS Citrix Virtual Desktop



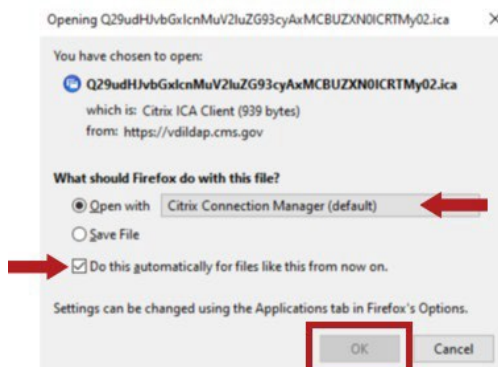
- f. You should now see ActivClient (or whatever the name of your card reader is) in Device Manager. Click **OK**.



5. On the Launch Application screen, select **Citrix Workspace Launcher** check option **Remember my choice for receiver links**. Click **Open Link**.



6. Make sure **Citrix Connection Manager (default)** is selected and the option **Do this automatically for files like this from now on** is checked and click **OK**.

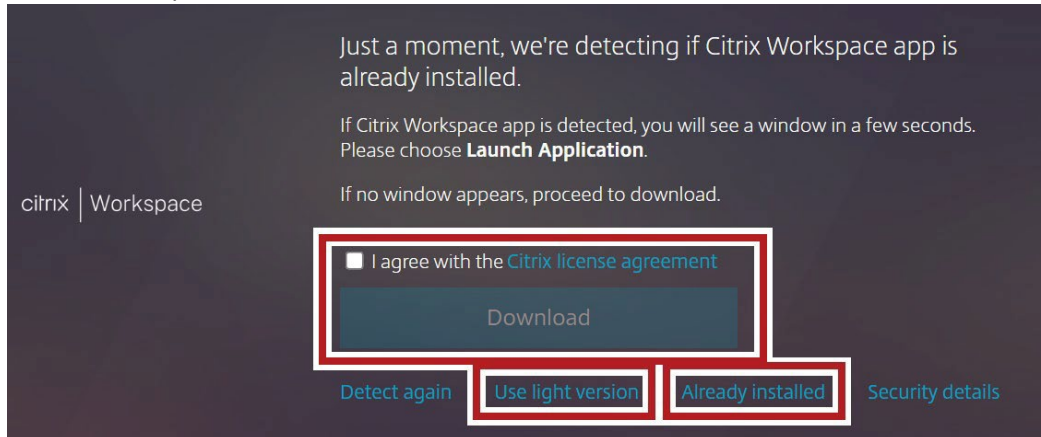


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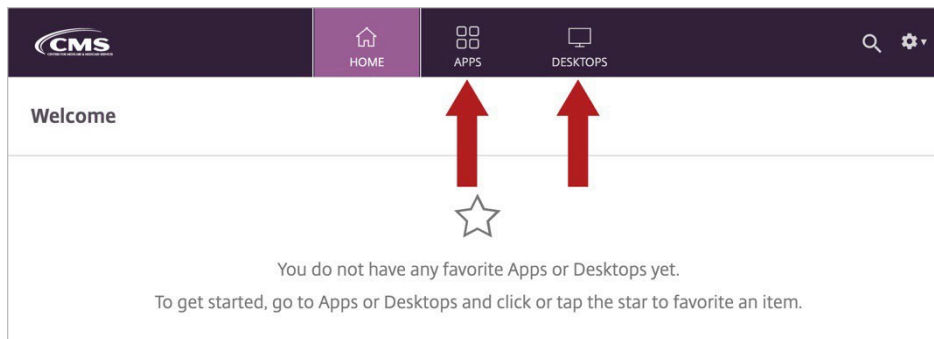
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7. If the Workspace App is already installed on your PC, select **Already installed**. Otherwise, you have the option use Light version (HTML5). DO NOT DOWNLOAD Workspace from this site use the Citrix site provided above.



8. Once logged in you will be presented with the following Storefront screen. You can find desktops and apps that you have access to under Desktops and Apps tabs. Please note that if you do not have access to any desktops or apps you will not see their corresponding tabs.

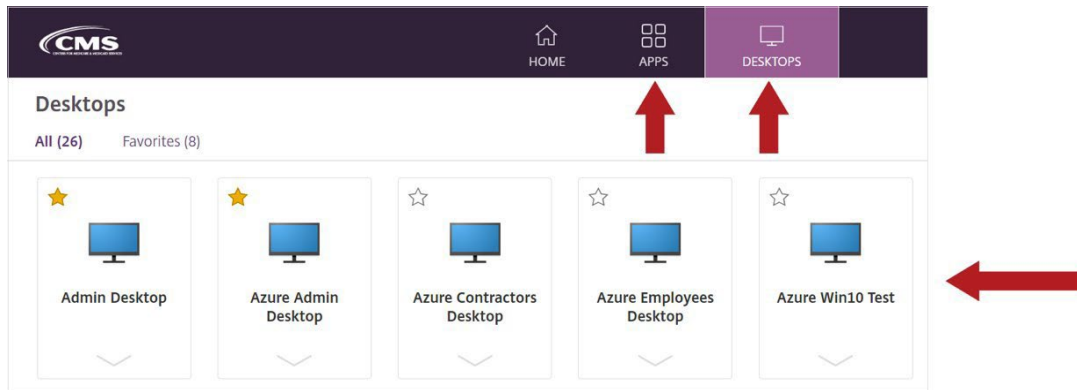


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9. Click on **Desktops (or Apps)** tab and then click on **Desktop (or Apps)** icon to launch it.



10. Click **OK** to the disclaimer when prompted and once the logon process completes, you should see your virtual desktop (or application).

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Connecting to the CMS Citrix Virtual Desktop



Safari

1. Browse to <https://vdi.cms.gov/> and click on **Sign In** button.
2. If you are using Okta, then type your CMS email address and password and click **Sign In**.

CMS.gov | Identity Management

Sign In

User ID

Password

☐ Agree to our [Terms & Conditions](#)

Sign In

OR

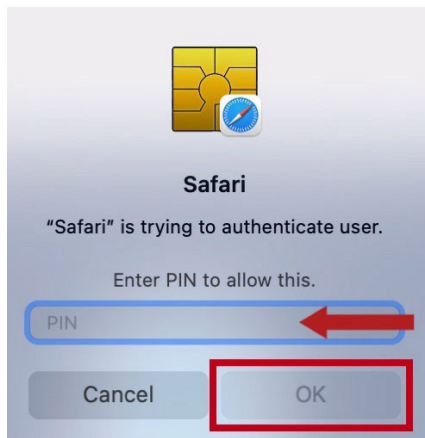
CMS PIV Card Only

PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.

[Forgot Password](#)

[Unlock Account](#)

3. Depending on what authentication method you have configured in Okta, you will need to respond accordingly on the next screen: Verify (use a push notification sent to the mobile app), Google Authenticator (enter single-use code from mobile app), or SMS Authentication (enter a single-use code sent to your mobile phone). Once authenticated please go to step #5 below.
4. If you are using PIV card, click on **Sign in with CAC / PIV card** button at the bottom of the screen. Enter your PIN when prompted and click **OK**.



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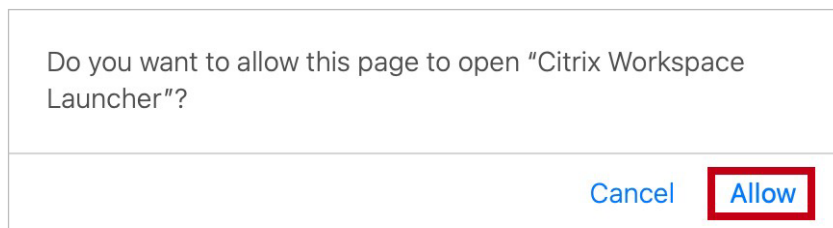
Connecting to the CMS Citrix Virtual Desktop



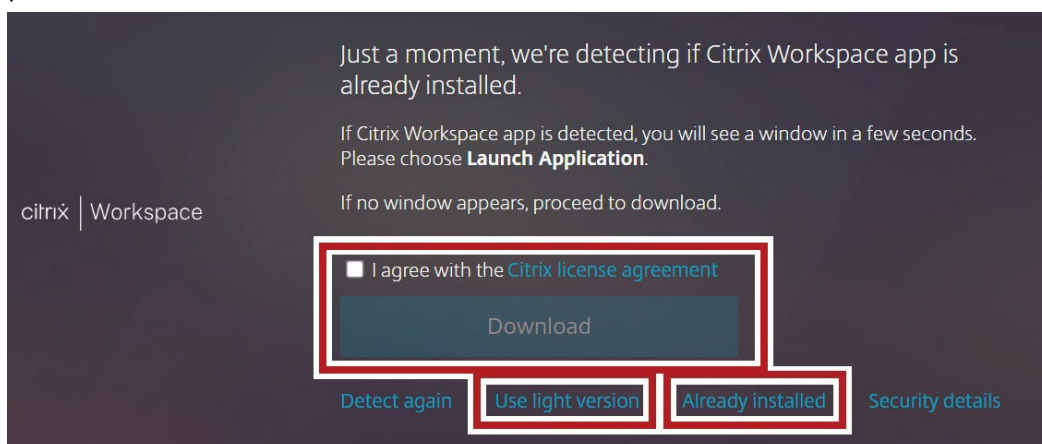
- Click on **Detect Workspace** button (Note that you can also click on **Use light version (HTML5)** if Citrix receiver is not installed on your computer or you experiencing issues with it. In this case applications and desktops will open within your browser).



- Click **Allow** when prompted to allow to open Citrix Workspace Launcher.



- If receiver (Workspace App) is already installed on your Mac select **Already installed**. Otherwise, you have the option use Light version (HTML5). If you do not see the screen below, please go to step #8. DO NOT DOWNLOAD Workspace from this site use the Citrix site provided above.

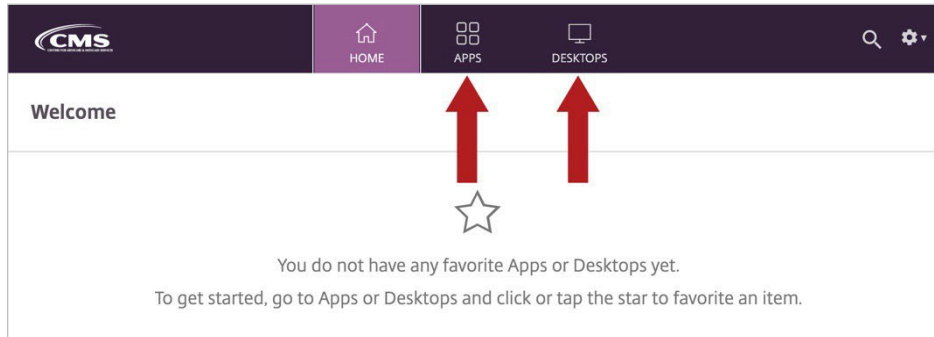


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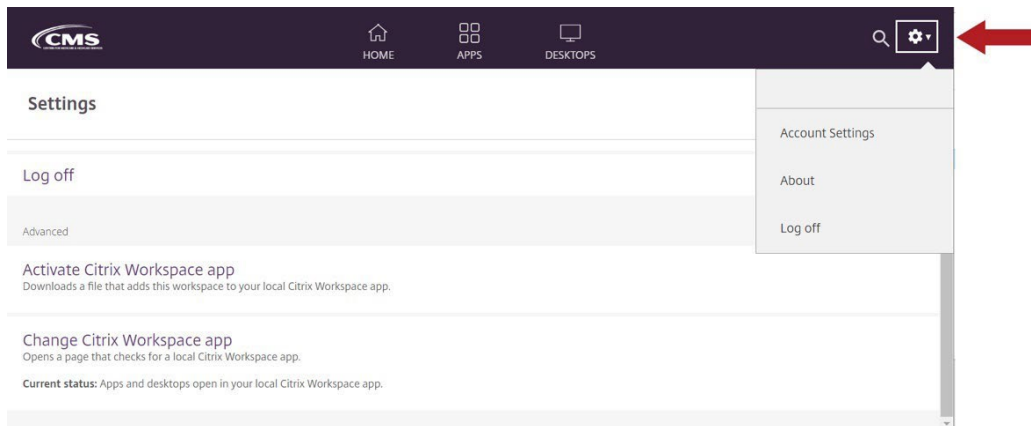
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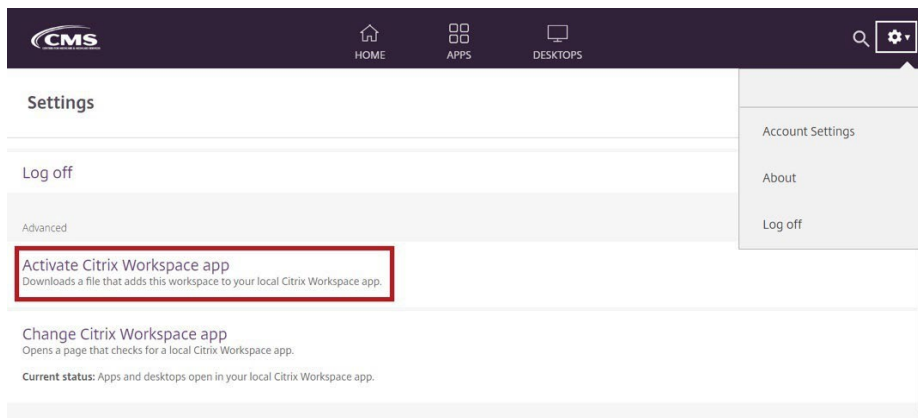
8. Once logged in you will be presented with the following Storefront screen. You can find desktops and apps that you have access to under Desktops and Apps tabs. Please note that if you do not have access to any desktops or apps you will not see their corresponding tabs.



9. Click on the gear icon at the top right corner and select **Account Settings**.



10. On the next screen, click **Activate Receiver**.

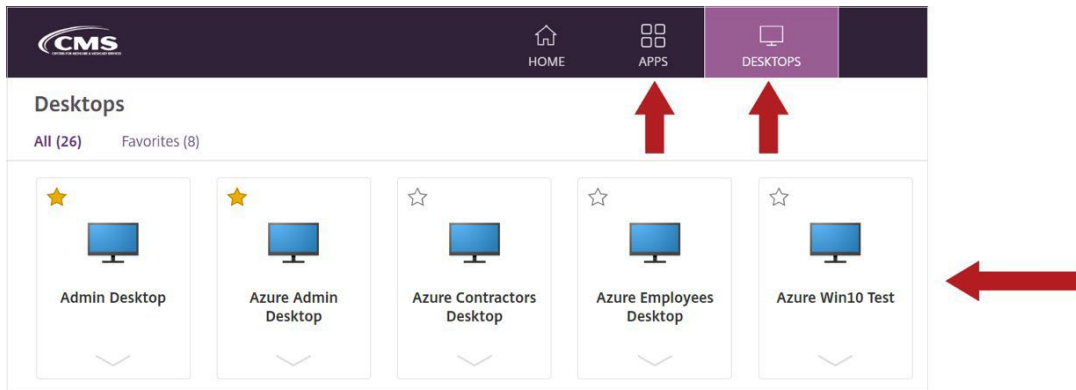


CMS Employee How-to Guide: PC

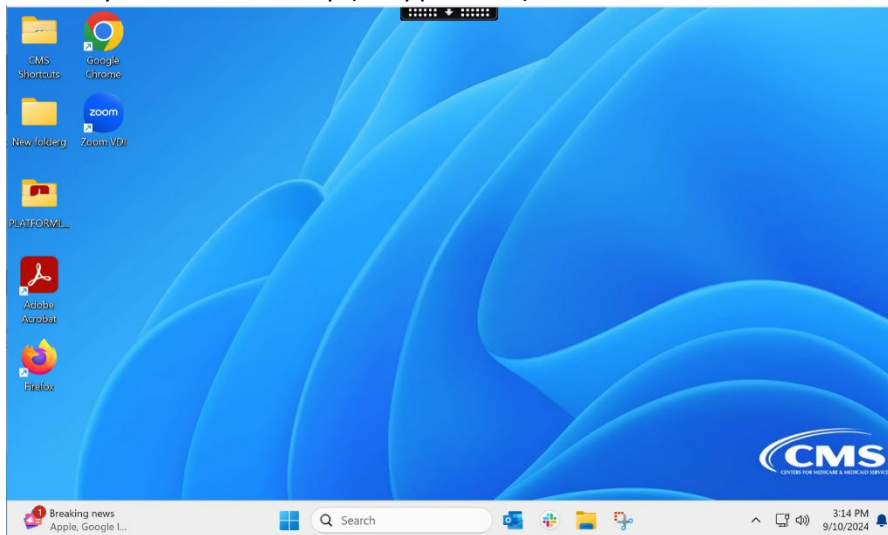
Connecting to the CMS Citrix Virtual Desktop



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Google Chrome for Mac

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2. If you are using Okta, then type your CMS email address and password and click **Sign In**.

A screenshot of the CMS.gov Identity Management Sign In page. The page has a white background with a blue header bar. The header bar contains the CMS.gov logo and the text "Identity Management". Below the header, the page is titled "Sign In". There are two input fields: "User ID" and "Password". The "Password" field has a small eye icon to its right. Below the input fields is a checkbox labeled "Agree to our Terms & Conditions". Below the checkbox is a blue button labeled "Sign In". Below the button is a horizontal line with the word "OR" in the center. Below the line is a button labeled "CMS PIV Card Only". Below the button is a paragraph of text: "PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login." Below the paragraph are two links: "Forgot Password" and "Unlock Account".

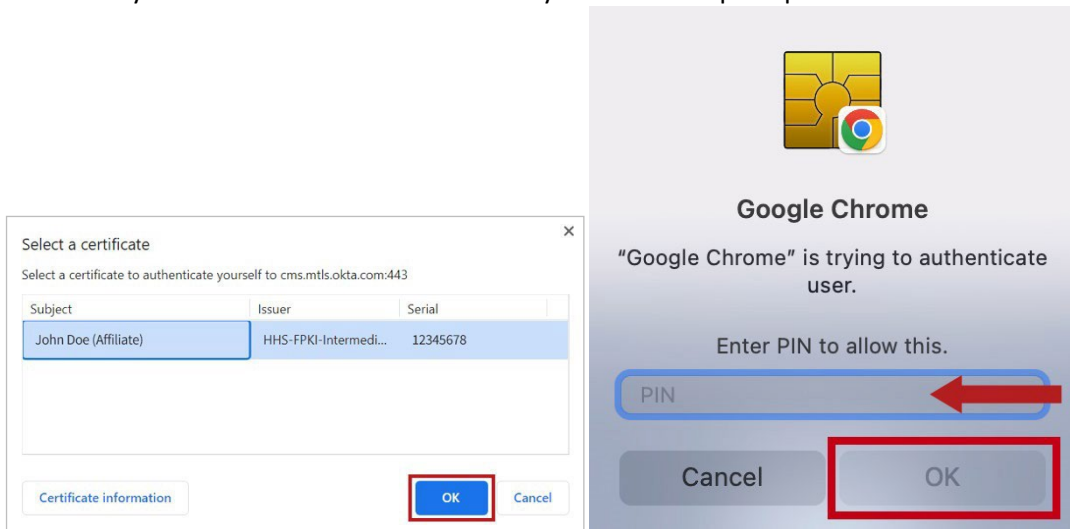
3. Depending on what authentication method you have configured in Okta, you will need to respond accordingly on the next screen: Verify (use a push notification sent to the mobile app), Google Authenticator (enter single-use code from mobile app), or SMS Authentication (enter a single-use code sent to your mobile phone). Once authenticated please go to step #6 below.
4. If you are using PIV card, click on **Sign in with CAC / PIV card** button at the bottom of the screen.

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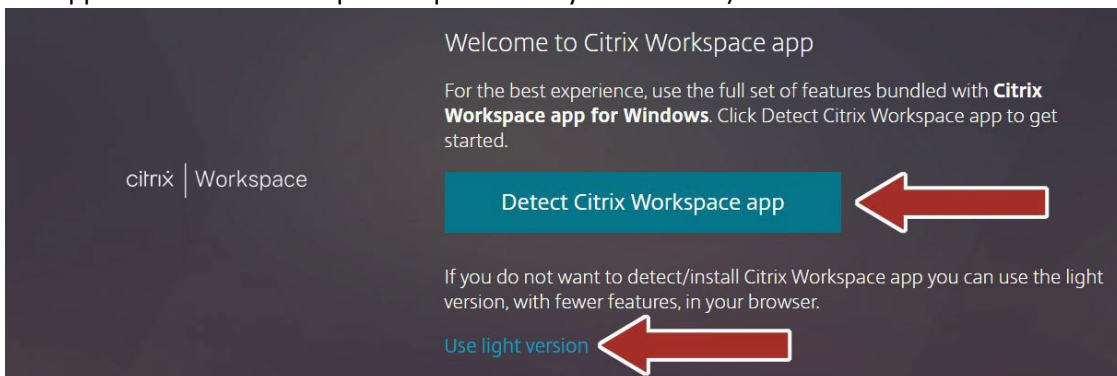
Connecting to the CMS Citrix Virtual Desktop



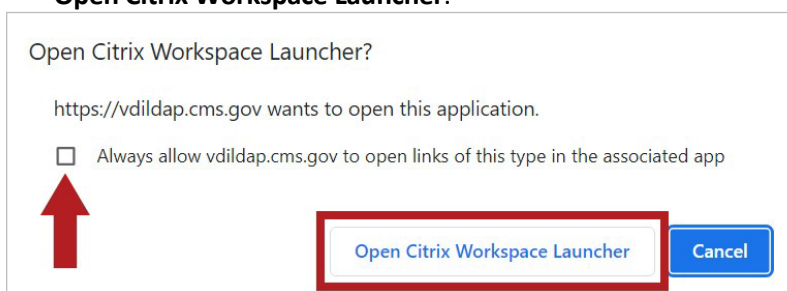
5. Select your certificate and click **OK**. Enter your PIN when prompted and click **OK**.



6. Click on **Detect Receiver** button (Note that you can also click on **Use light version (HTML5)** if Citrix receiver is not installed on your computer or you experiencing issues with it. In this case applications and desktops will open within your browser).



7. Select **Always allow vdildap.cms.gov** to open links of this type in the associated app and click on **Open Citrix Workspace Launcher**.

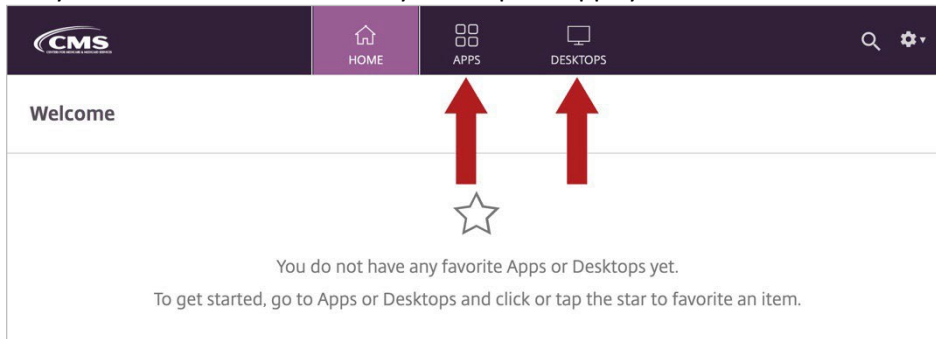


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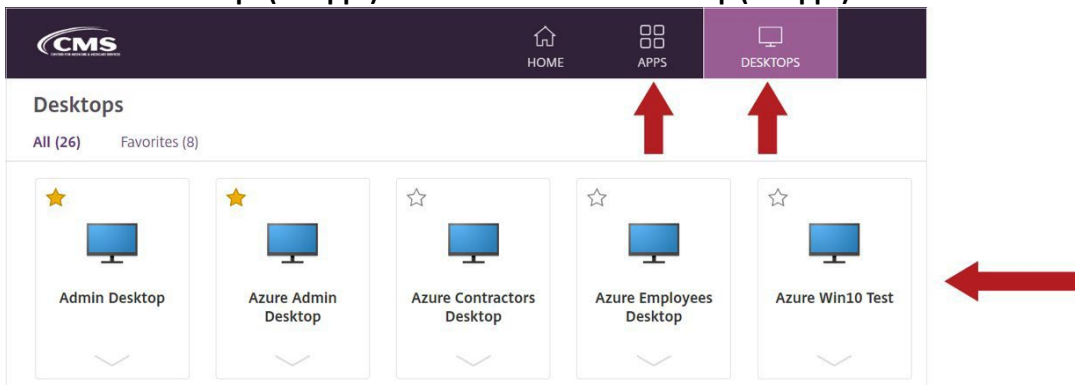
Connecting to the CMS Citrix Virtual Desktop



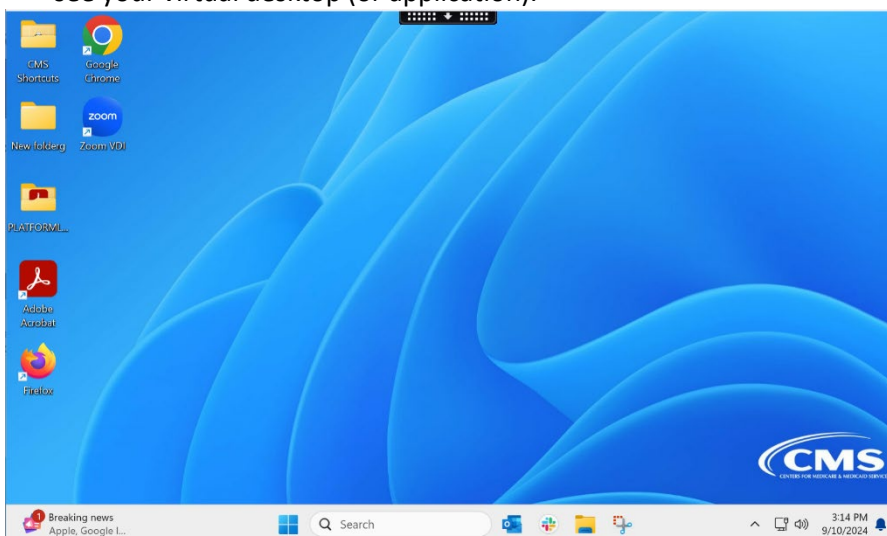
8. Once logged in you will be presented with the following Storefront screen. You can find desktops and apps that you have access to under **Desktops** and **Apps** tabs. Please note that if you do not have access to any desktops or apps you will not see their corresponding tabs.



9. Click on **Desktops (or Apps)** tab and then click on **Desktop (or Apps)** icon to launch it.



10. Click **OK** to the disclaimer when prompted and once the logon process completes, you should see your virtual desktop (or application).



CMS Employee How-to Guide: PC

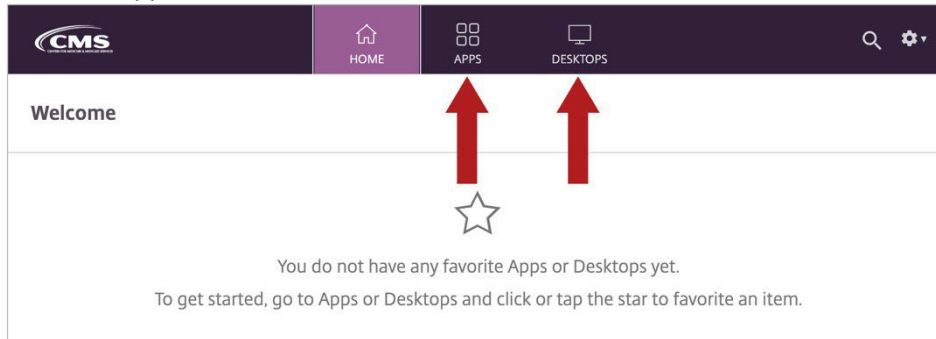
Connecting to the CMS Citrix Virtual Desktop



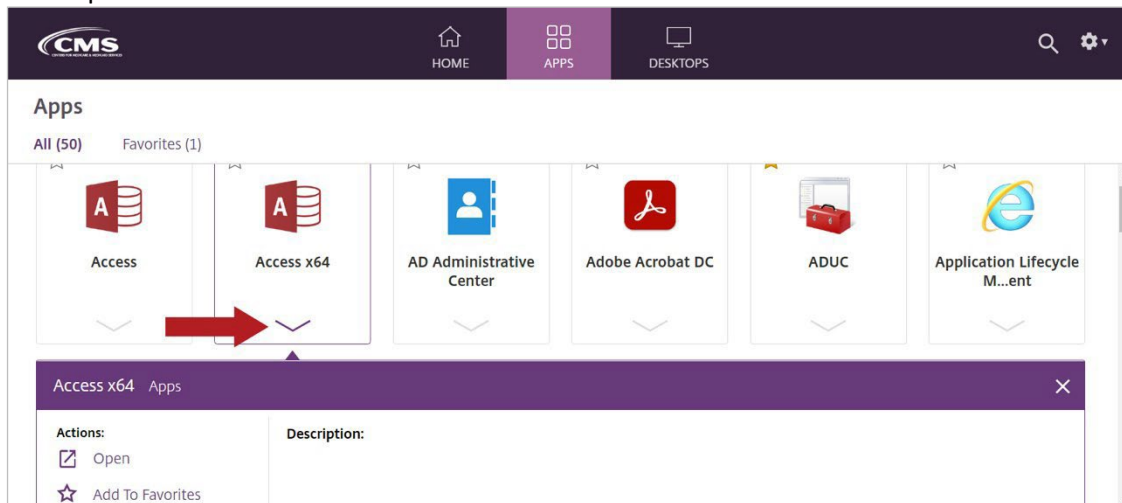
STOREFRONT NAVIGATION

This section describes how to use the StoreFront once you've logged into the <https://vdi.cms.gov> via your browser.

Click on **Desktop** tab at the top of the screen to see available virtual desktops or on Apps tab to see available applications.



To add virtual desktops or apps to your Home screen (Favorites), click on arrow below the application or desktop and select **Add to Favorites**. You should now see the icon under Home tab.

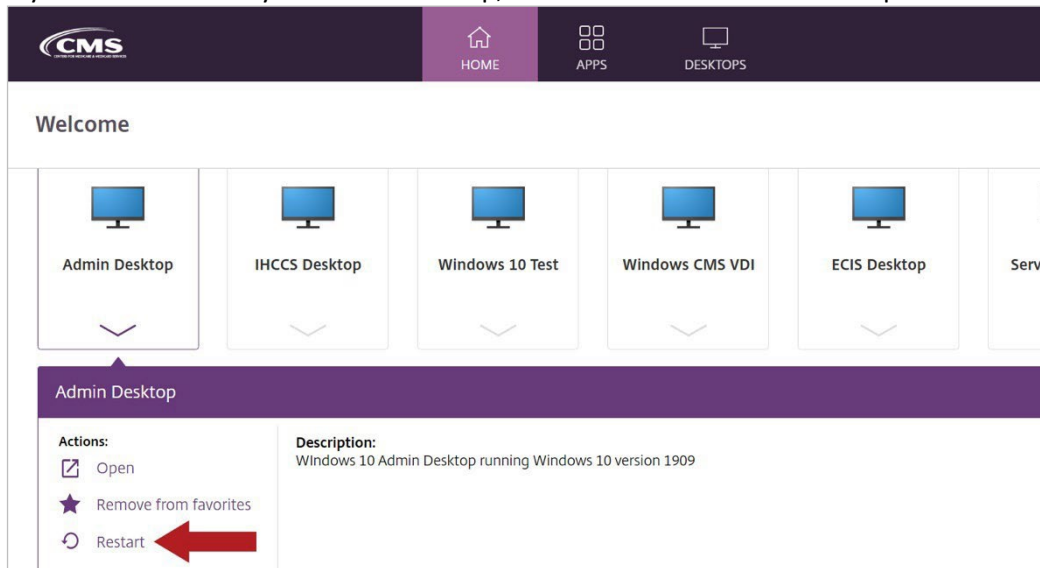


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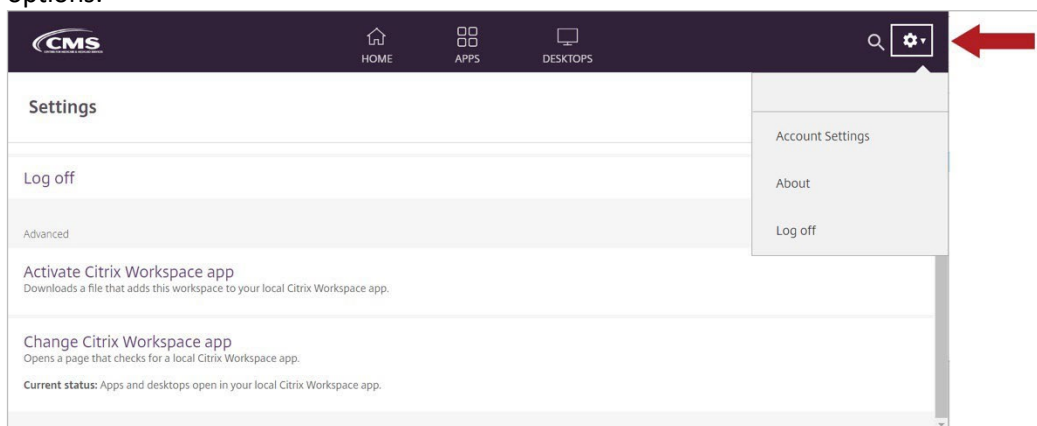
Connecting to the CMS Citrix Virtual Desktop



If you need to restart your virtual desktop, click on arrow below the desktop icon and select **Restart**.



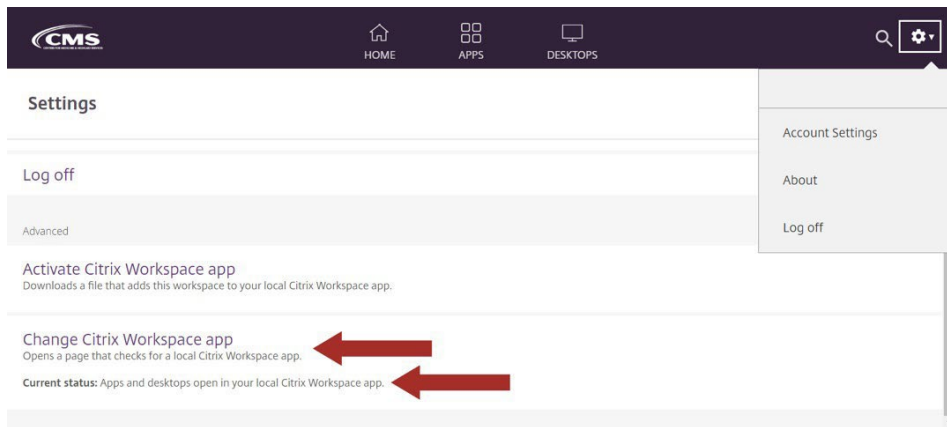
Clicking on gear icon at the top right corner expands drop-down menu and presents the following list of options:



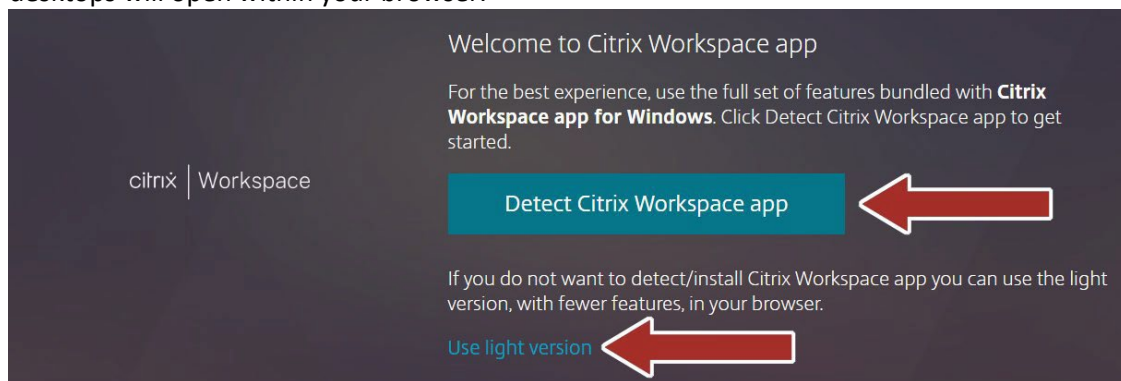
- **Account Settings** – Presents the following options:
 - **Activate Citrix Receiver** – allows to download a file that adds the workspace to local Citrix Workspace App. This is useful for Mac users as in some cases browser such as Safari downloads Citrix .ica file instead of opening it with Citrix Workspace App. Activating it via this option remedies the issue.
 - **Change Citrix Workspace** – only present in Microsoft Edge, Google Chrome, Mozilla Firefox, and Safari. Clicking on it opens page that allows to detect if a local Citrix Workspace App is installed, download it, or switch to a light version (HTML5). Also, there is a current status of receiver used (local client vs light version) displayed below. See below screenshots.
- **About** – displays link to Third Party Notices for Citrix Receiver for Web
- **Log Off** – logs you out

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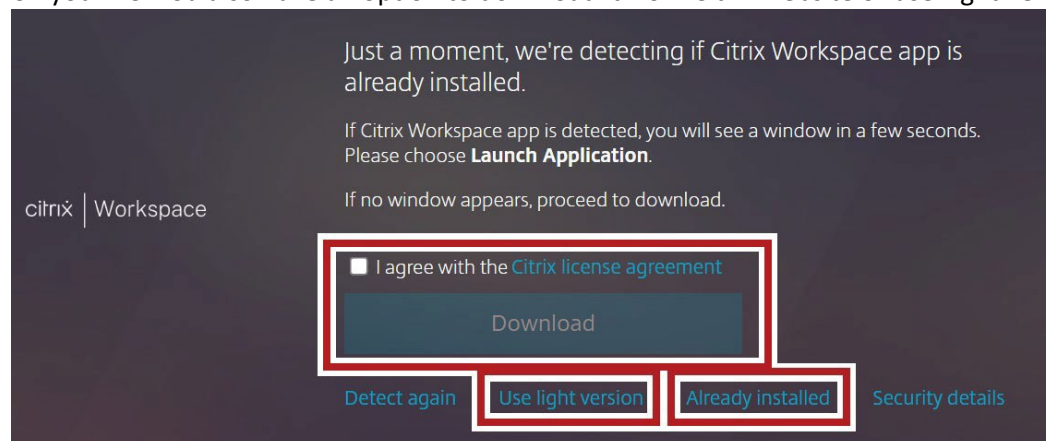
Connecting to the CMS Citrix Virtual Desktop



Clicking **Detect Workspace** will display more options. You can also click on **Use light version** (HTML5) if Citrix Receiver is not installed on your computer or you are experiencing issues with it. In this case applications and desktops will open within your browser.



From the screen below, you can select **Already installed** if receiver (Workspace App) is already installed on your PC. You also have an option to download it from Citrix website or use Light version (HTML5).



NEW APPLICATION REQUEST

If you need to add an application within your virtual desktop or you would like an application to be published under Apps on CMS Virtual Apps and Desktops portal, please contact the CMS IT Service Desk at **410-786-2580** or **1-800-562-1963**.

Please provide the following information:

1. Name of the application
2. Name of the point of contact (POC) for the application
3. Location of installation files and instructions for installing it in VDI
4. Business justification for use of the application
5. Licenses (if required)
6. List of users that are required to have access to the application

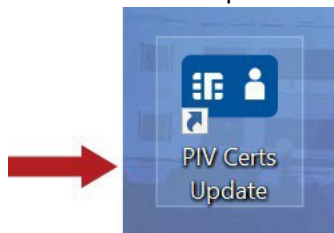
Please note that the application has to be supported by the vendor in a multi-user environment and have appropriate license model (if applied) for it to work properly.

TROUBLESHOOTING TIPS and HOW TOs

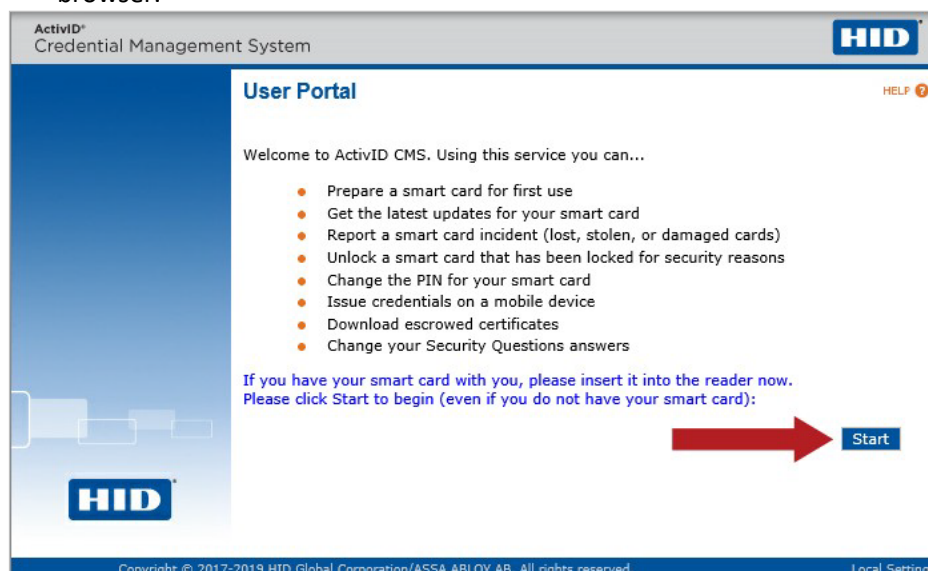
This section describes some of the common issues, basic troubleshooting steps to resolve them, and some helpful tips.

PIV Certificate Update

The PIV Cert Update icon is located on the VDI desktop.



1. Make sure that Citrix Workspace App is installed on computer that you are using to access CMS Virtual Apps and Desktops portal, and make sure PIV is inserted into the card reader.
2. Make sure you have a sound internet connection and you are not connected to any VPN.
3. Use Microsoft Edge to access CMS Virtual Apps and Desktops portal.
 - a. If you are accessing portal using Mac, follow instructions in section Safari or Google Chrome for Mac to make sure you are using Citrix Workspace App with your browser rather than HTML5 receiver (when VDI session opens within the browser).
4. Once you double-click on the icon you will be presented with the following screen within your browser.



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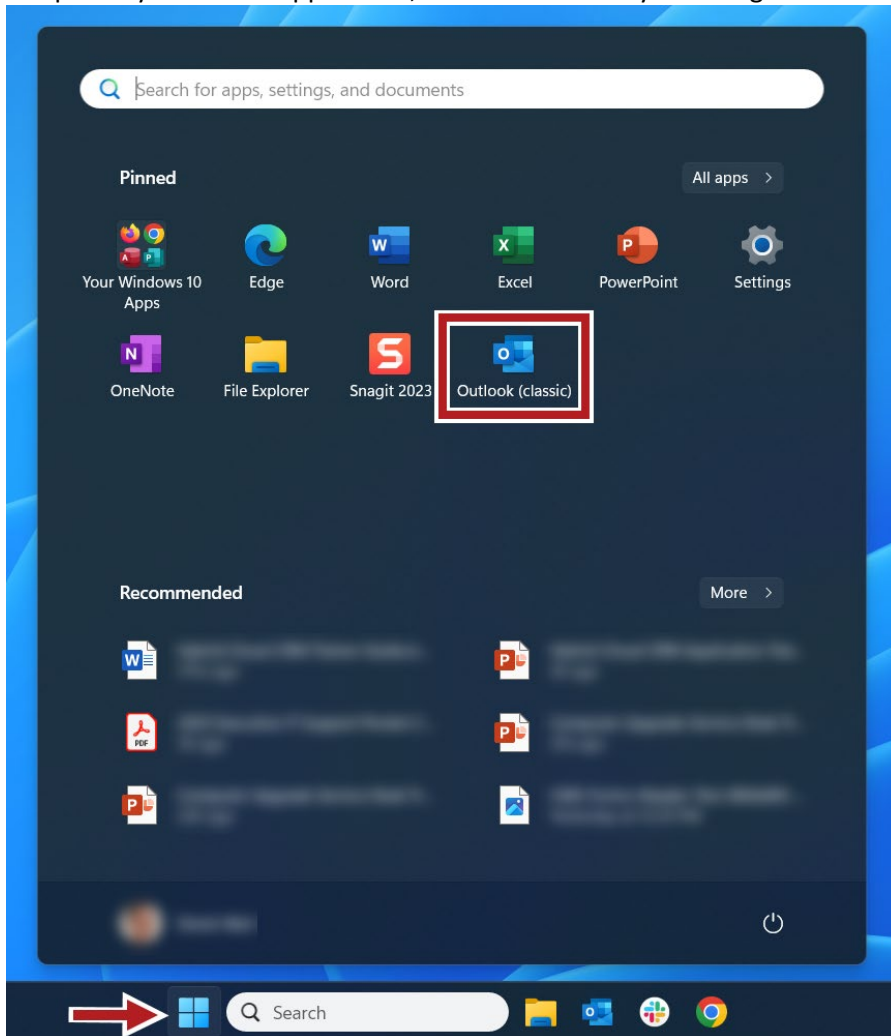
Connecting to the CMS Citrix Virtual Desktop



5. Click **Start**. After it reads your PIV, you should be prompted for your PIV PIN. Please note that it can take some time and even look like the page is not responding before you get prompted for PIN or after you enter it and click **Next**. Follow the on-screen instructions to update your PIV. If you are getting prompted for user name and password, then the system was unable to recognize your PIV. You can try to re-insert PIV into the card reader or go through the above steps again to make sure all the requirements are met.

Outlook Profile Configuration

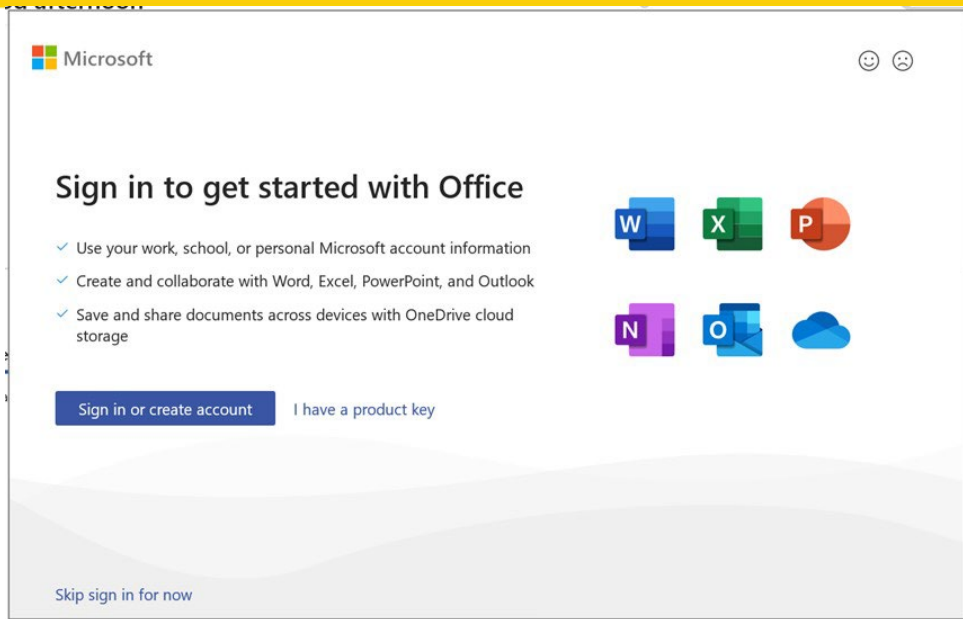
1. Open any Microsoft application, such as **Outlook** by selecting the icon from your Start menu.



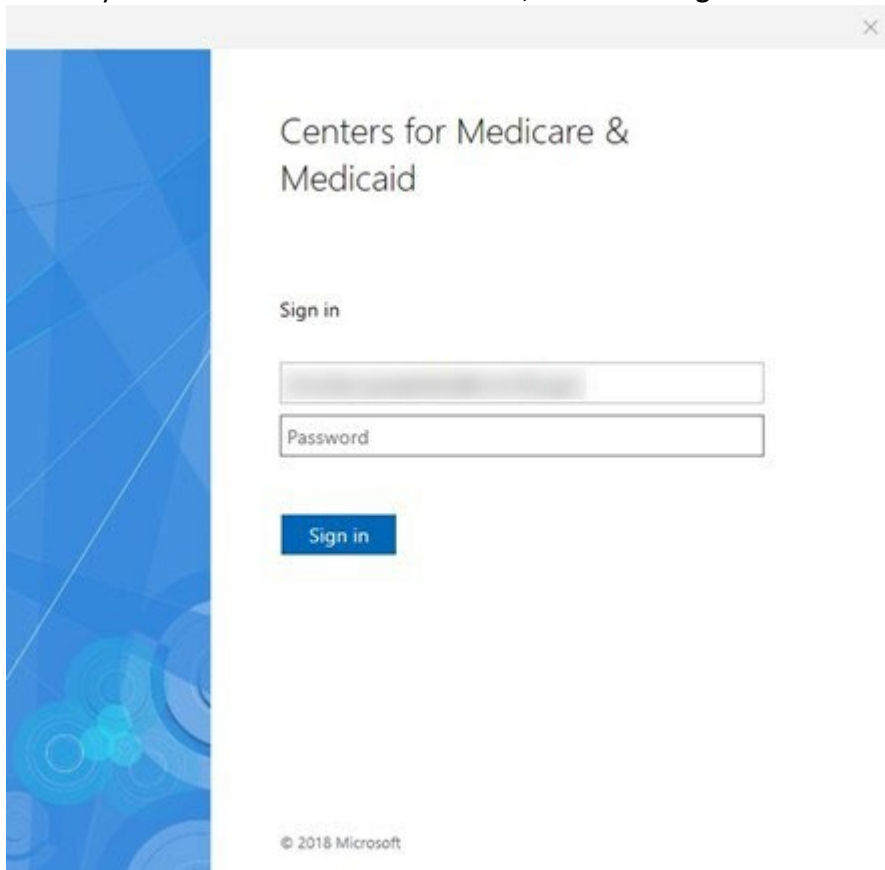
2. The Sign in window will appear. Select **Sign in to create account**.

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Connecting to the CMS Citrix Virtual Desktop



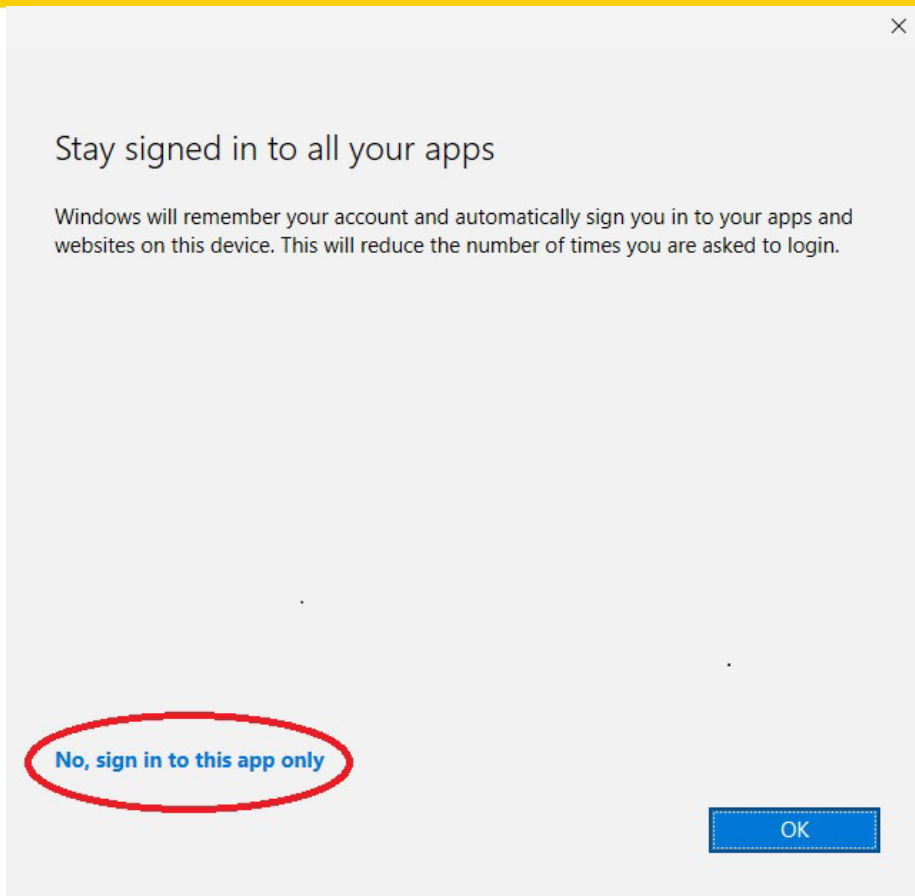
3. Enter your **CMS Email** and **EUA Password**, then select **Sign In**.



4. Select **“No Sign in to this app only”** to stay signed in to your outlook app.

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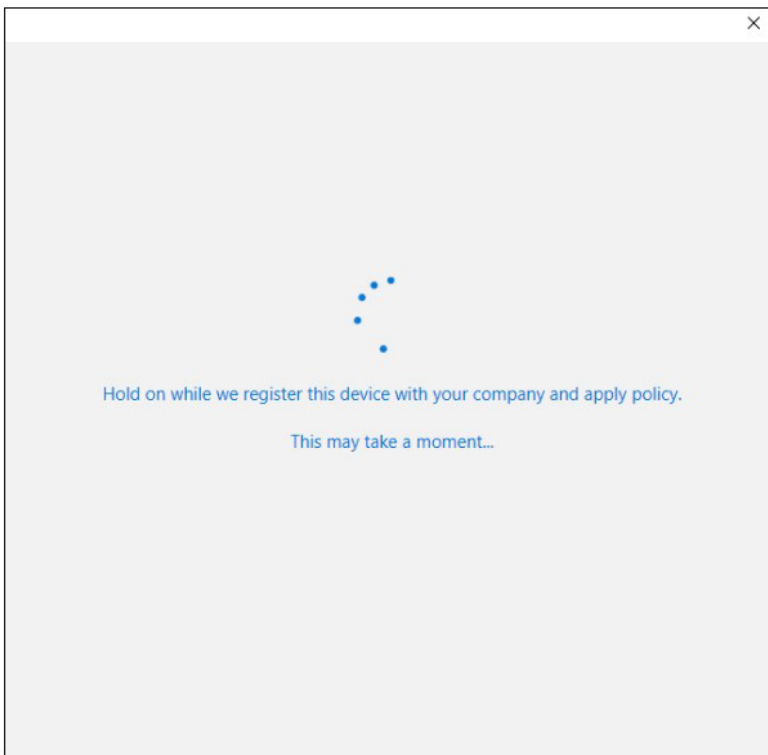
Connecting to the CMS Citrix Virtual Desktop



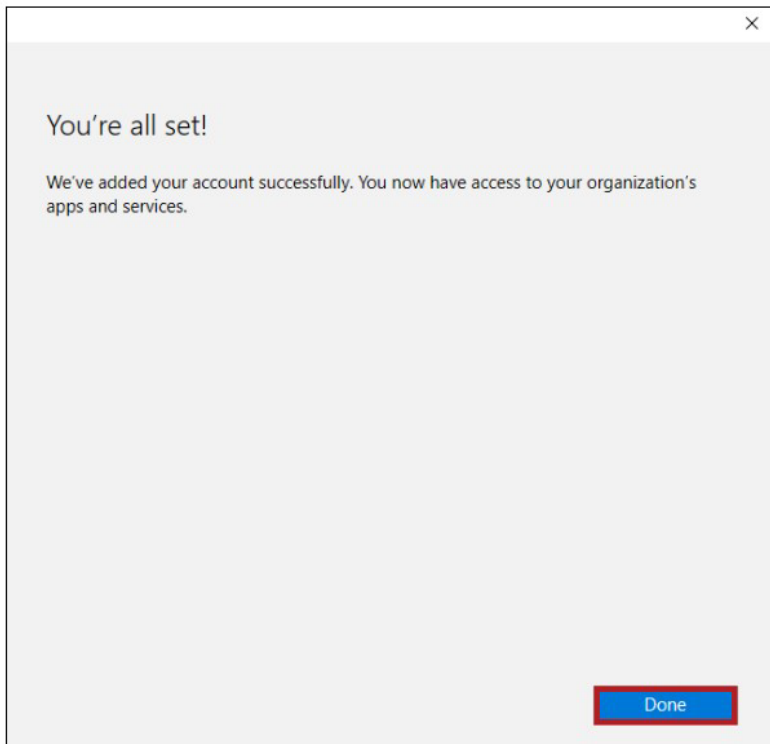
5. You will see a screen advising that your device is being registered and policies are being applied.

CMS Employee How-to Guide: PC

Connecting to the CMS Citrix Virtual Desktop



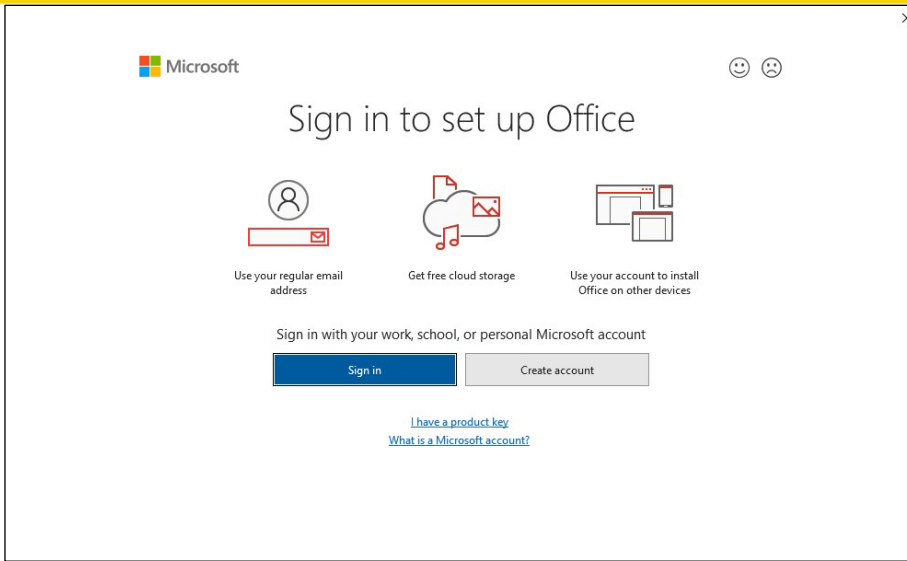
6. Once you get the **You're all set!** message, select **Done**.



7. At the **Sign in to set up Office** window, select **Sign in**.

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Connecting to the CMS Citrix Virtual Desktop



8. At the **Active Office** window, enter your CMS email address, then select **Next**.



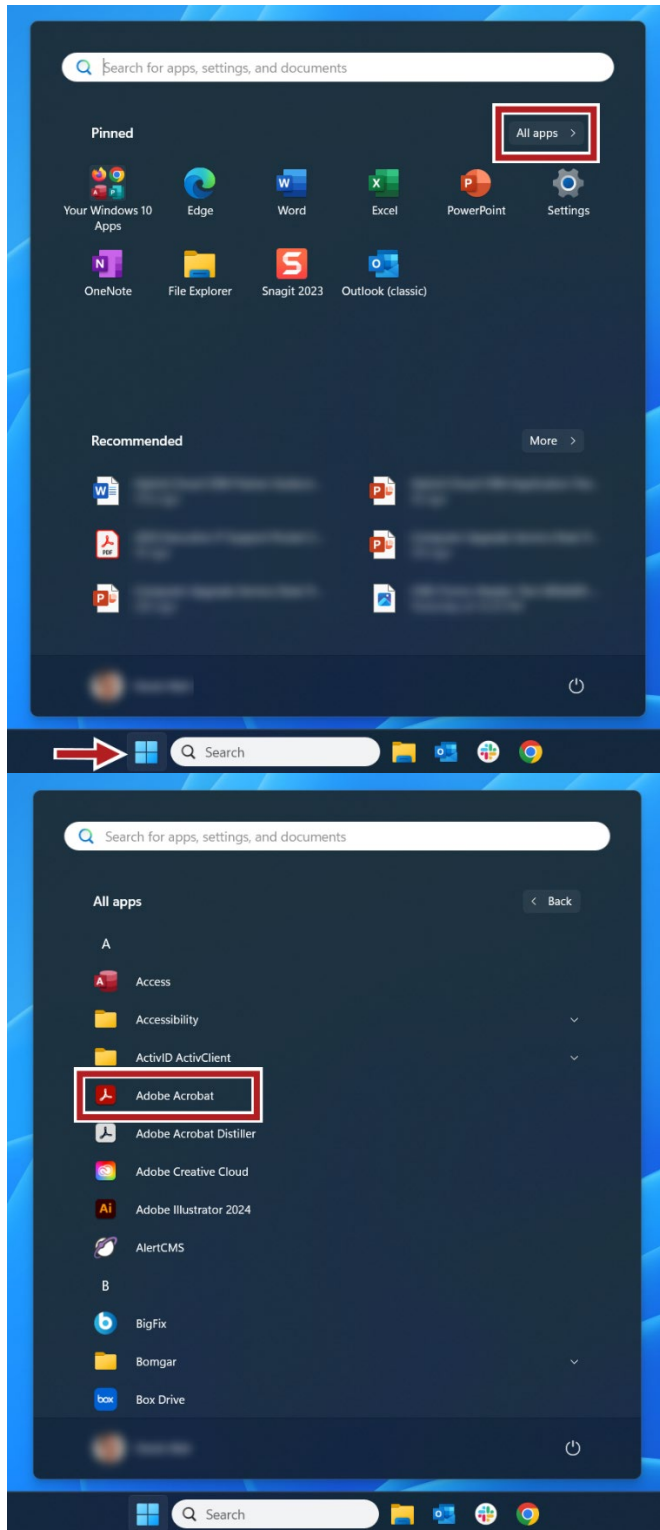
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Adobe Acrobat Okta Sign In for PC



Adobe Sign In

1. Open Adobe Acrobat by opening the **Start** menu and clicking **All Apps** then **Adobe Acrobat**.



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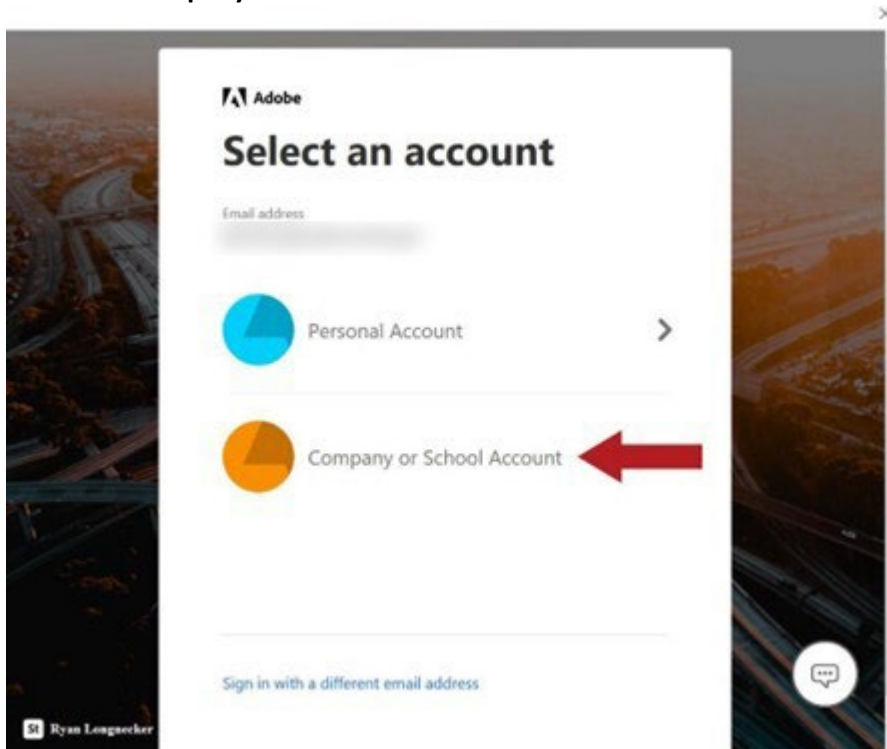
Adobe Acrobat Okta Sign In for PC



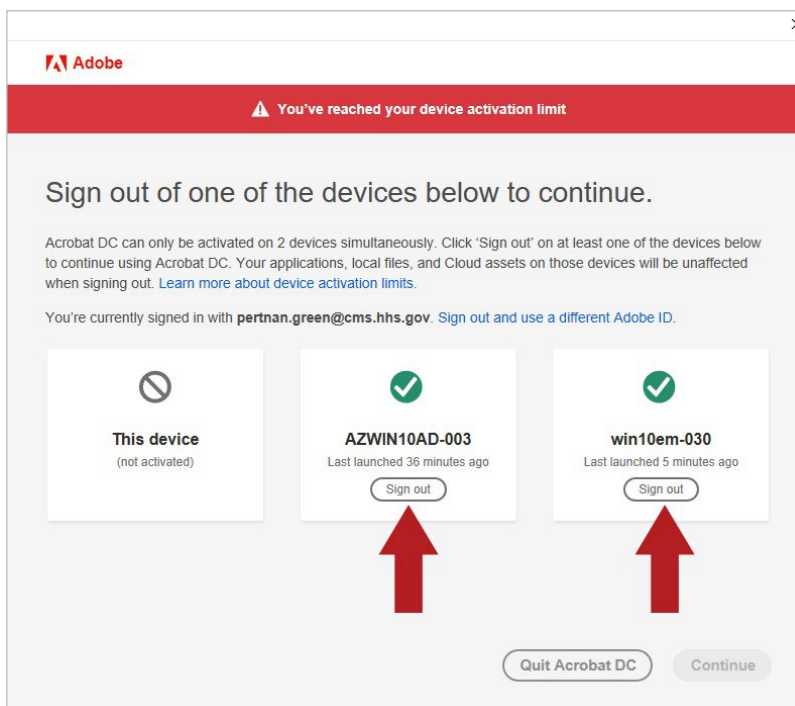
2. A **Sign In** window will open. Type your CMS Email address and click **Continue**.

A screenshot of the Adobe Sign in window. The window has a white background with a dark, abstract image on the left and right sides. At the top left is the Adobe logo. Below it is the text "Sign in" in a large, bold, black font. Underneath "Sign in" is the text "New user? [Create an account](#)" in a smaller, blue font. Below that is a text input field labeled "Email address" containing the text "John.Doe@cms.hhs.gov". A red arrow points to the email address. To the right of the input field are two buttons: "Cancel" and "Continue". The "Continue" button is highlighted with a red rectangular box. Below the input field and buttons is a horizontal line with the word "Or" in the center. Below this line are three buttons: "Continue with Google" (with a Google logo), "Continue with Facebook" (with a Facebook logo), and "Continue with Apple" (with an Apple logo). At the bottom left is a small icon of a person with the text "Ryan Longnecker". At the bottom right is a small icon of a speech bubble with three dots inside. At the bottom center is the text "Get help signing in" in a blue font.

3. Select **Company or School Account**.



4. Sometimes you will be presented with the below screen (THIS IS NORMAL). Select **sign out** on both devices.

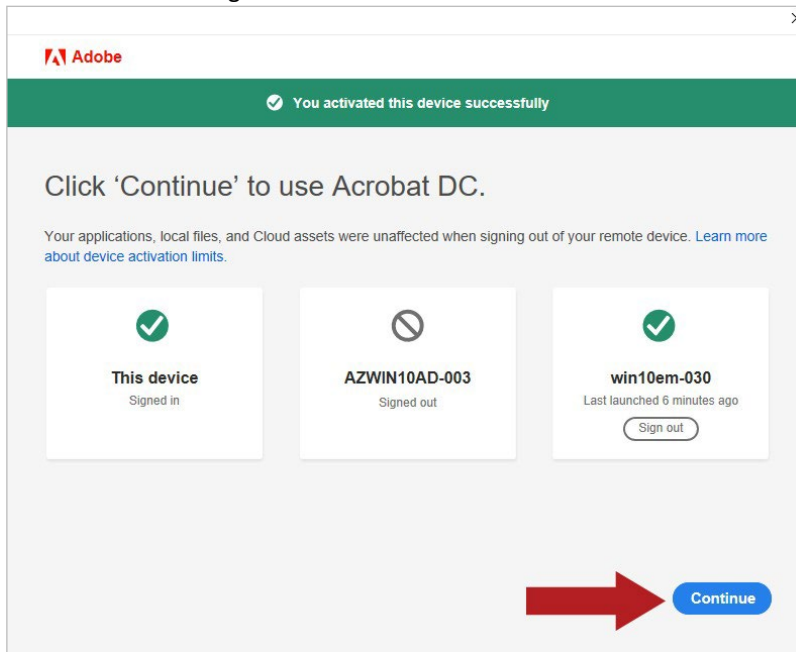


CMS Employee How-to Guide: PC

Adobe Acrobat Okta Sign In for PC



5. After both are signed out select **Continue**.



CMS IT SERVICE DESK

If above steps did not remedy your issue or you experience a different problem accessing or using CMS Virtual Apps and Desktops portal, please contact CMS IT Service Desk.

Phone: **410-786-2580** or **1-800-562-1963**

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