



Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - Requesting EPPE DUA Requester Role and Attestation

Version 2.0

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1. Overview

This training guide will cover the following:

- How to initially request for a DUA Requester Role to be able to complete a Contractor (CONT) DUA.
- How to log into EPPE as a DUA Requester.

1.1 EPPE Access Prerequisites

Before continuing this training, please complete the following:

- Obtain Identity Management (IDM) Credentials, Multi-Factor Authentication (MFA), and EPPE Access: <https://www.cms.gov/files/document/eppeidm.pdf>
- Access CMS Portal: <https://portal.cms.gov/>

1.2 Icons Used Throughout the EPPE System



A red asterisk denotes that a field is required to be entered.

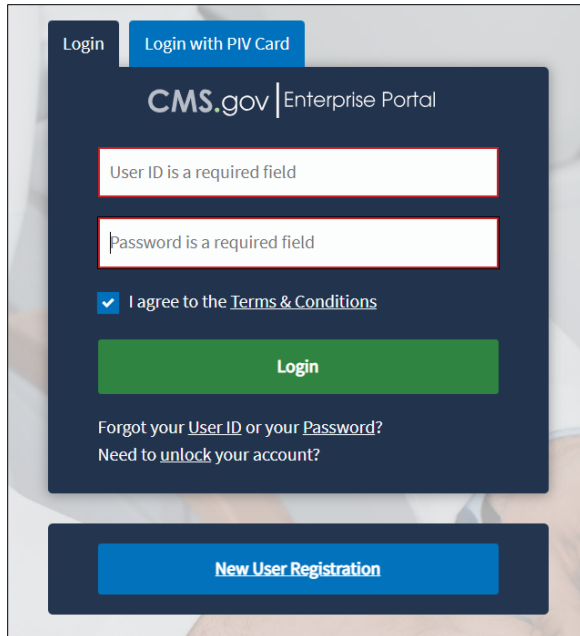


The question mark icon, when selected, will display field specific help.

2. Obtaining the EPPE DUA Requester Role

Visit the CMS.gov Enterprise Portal website (<https://portal.cms.gov>) to request the DUA Requester role.

Figure 1: CMS.gov Website

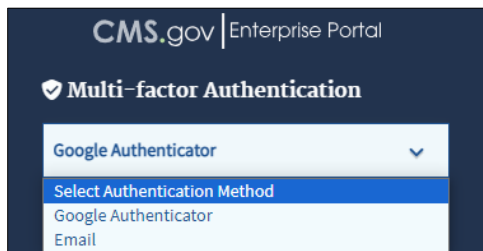


The CMS Portal Login screen is displayed.

1. Enter your Login Credentials.
2. Click **Login**.

The MFA page is displayed.

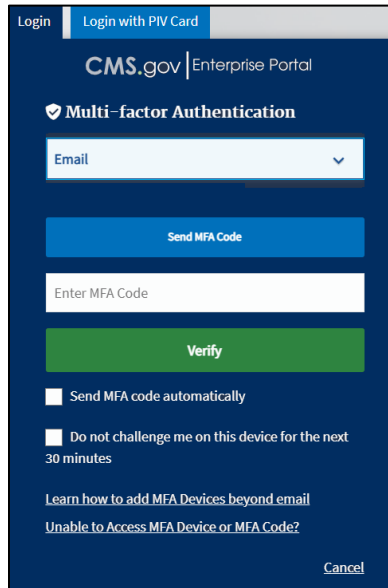
Figure 2: MFA Page



3. Select **Email** as the MFA option.

Note: Email is the default option and will always be available in the dropdown list.

The MFA page is displayed with additional fields.

Figure 3: MFA Page with Additional FieldsThe screenshot shows the 'Multi-factor Authentication' page on the CMS.gov Enterprise Portal. At the top, there are tabs for 'Login' and 'Login with PIV Card'. The page title is 'CMS.gov | Enterprise Portal'. Below the title, there is a section for 'Multi-factor Authentication'. It features a dropdown menu labeled 'Email', a blue 'Send MFA Code' button, a text input field labeled 'Enter MFA Code', and a green 'Verify' button. Below these are two checkboxes: 'Send MFA code automatically' and 'Do not challenge me on this device for the next 30 minutes'. At the bottom, there are links for 'Learn how to add MFA Devices beyond email' and 'Unable to Access MFA Device or MFA Code?', and a 'Cancel' button.

4. Click **Send MFA Code**.
5. Once the email is received, enter the MFA Code in the **Enter MFA Code** field.
6. Click **Verify**.

2.1 Request a Role in EPPE

The **CMS Enterprise Portal Welcome Screen** includes the **EPPE** Application tile.

Figure 4: CMS Enterprise Portal Welcome Screen

1. Click the **EPPE** application tile. A dropdown menu opens.

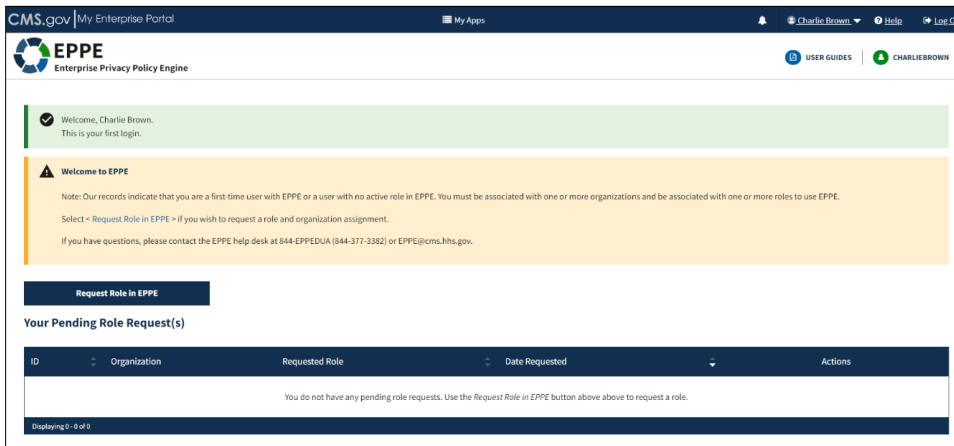
Figure 5: CMS Enterprise Portal: My Portal



2. Click **Application** to access the EPPE system.

The EPPE Welcome screen is displayed.

Figure 6: EPPE Role Request Welcome Screen



3. Click the **Request Role in EPPE** button to start the role selection process.

The Request Role in EPPE pop-up is displayed.

Figure 7: Request Role in EPPE Pop-Up

4. Enter your **Organization Name** and select your **Organization** from the dropdown.
5. Select **DUA Requester** from the **Role** dropdown.
6. Click **Submit**.

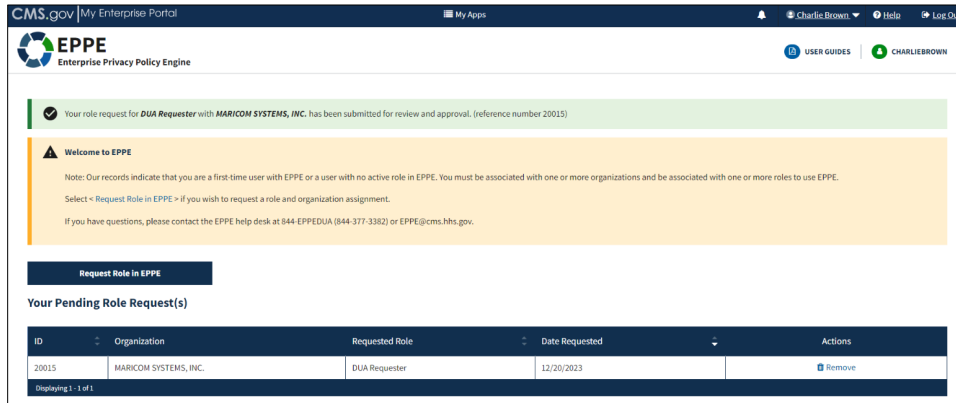
The Attestation message “Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the EPPE web page,” including a link to the EPPE page on CMS.gov.

Figure 8: Attestation Message

7. Select the **I agree** checkbox.
8. Click **Submit**.

The Confirmation Message is displayed.

Figure 9: EPPE Role Request Acknowledgement



9. Verify that the confirmation message accurately indicates the role requested.

Note: The EPPE role request submission acknowledgement displays the message: “Your organization/role request has been submitted for approval.” The EPPE Administration (EPPE Admin) Team will review for approval.

2.2 Add a New Organization

In this example, we are adding a new organization.

1. From the Request a Role in the EPPE screen, click the ***Cannot locate your Organization?*** link to add an organization.

Figure 10: Request Role: Cannot locate your Organization

The Add New Organization pop-up is displayed.

The message, “*The new organization will be available for you to select only upon approval. Do you wish to continue with the request?*” appears at the top of the Add Organization screen as it expands. Entering information answers this question.

Figure 11: Add New Organization

Add New Organization

i The new organization will be available for you to select only upon approval.
Do you wish to continue with the request?

Organization Name*

Country
United States

Street address*

City* **State***
- Select -

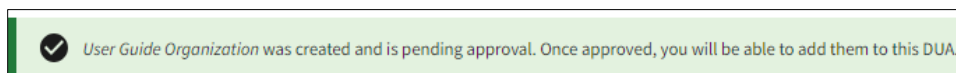
Submit **Cancel**

2. Enter the **Organization** information:

- Organization Name
- Street Address
- City
- State

3. Click **Submit**.

Note: A new Organization requires EPPE Administrator approval and will not be immediately available.

Figure 12: Add Organization: Confirmation Message

After submission, a confirmation message will be displayed.

3. Acronyms

The following are acronyms used within the EPPE system.

Table 1: Acronyms

Acronym	Definition
CMS	Centers for Medicare and Medicaid Services
DUA	Data Use Agreement
EPPE	Enterprise Privacy Policy Engine
IDM	Identity Management
MFA	Multi-Factor Authentication
PDF	Portable Document Format

4. EPPE Help Desk Information

EPPE Help Desk Contact Information

Hours of Operation: Monday – Friday 9:00 AM to 6:00 PM EST

844-EPPE-DUA (844-377-3382)

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