



Centers for Medicare & Medicaid Services  
eXpedited Life Cycle (XLC)

# Enterprise Privacy Policy Engine (EPPE)



**Contractor Approval Workflow Training  
Module - Requesting Additional Roles**

# Training Topics

## Training Topics in This Module

- EPPE Application Access Prerequisites
- Basic Information About EPPE
- Requesting Additional Role(s)
- EPPE Help Desk Information

# EPPE ACCESS PREREQUISITES

# EPPE Access Prerequisites

## CMS Enterprise Portal Access, IDM Credentials, and EPPE Access

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

# Basic Information About EPPE

## Icons Used Throughout the EPPE System



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



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

# REQUESTING ADDITIONAL ROLES

# DUA Requester – Manage Access

## EPPE Menu

CMS.gov | My Enterprise Portal My Apps User Name Help Log Out

### Enterprise Privacy Policy Engine

EPPE Home

**DUA(s)**

New / Re-Use

Update / Amend

Close

Extend

**My DUA(s)**

Un-Finished

Submitted

Pending Action(s)

Approved

Expired

Closed

Denied

**Re-Assign DUA(s)**

Change Contact

Ad Hoc Request

**Search**

DUA Search

**My Access**

**Manage Access**

**My Preference(s)**

Email Preference

Exit EPPE

### Welcome to EPPE

EPPE is an application that streamlines the process of requesting data from the Centers for Medicare & Medicaid Services (CMS) via an online Data Use Agreement (DUA).

Goals:

- Reduce the amount of time to process a DUA.
- Transition from a paper-based to an automated process.
- Provide a 100% traceable record of CMS data disclosures.

Training Materials: Visit the EPPE web page on cms.gov, to download Training Slide Decks for the following:

- Contractor Approval Workflow.

Version 27.0

Logged in as: DUA REQUESTER

Select the **Manage Access** option on the **My Access** menu.

# DUA Requester – Manage Access for New Role

## EPPE Roles Display

**MANAGE ACCESS**

My Roles

Organization Name	Role	Data Dissemination System	Remove
Video Training Company 1	DUA REQUESTER		Remove

Select an option \*

Request Additional Role ?

Proxy Role ?

Next

1. The **Manage Access** screen displays with the **Organization Names, Roles, Data Disseminating Systems (if applicable)** to which you have access and **Proxy Role**.
2. Select the **Request Additional Role** radio button.
3. Select the **Next** button.

**Note:** **Data Dissemination System** applies only to the **Extractor** and **Shipper** roles which are internal to CMS.

# DUA Requester – Manage Access for New Role

## Select Organization

**MANAGE ACCESS**

Request Additional Role  
*Required fields are marked with an asterisk (\*).*

Enter **Organization Name \***:  [Cannot locate the Organization? ?](#)

**Role \***:

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Selected Role Request

	Organization Name	Role	Data Dissemination System	Action
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1. The **Request Additional Role** screen displays.
2. Enter the **Organization Name** to display a list of organizations matching the search criteria.

# DUA Requester – Manage Access for New Role

## Add New Organization

**MANAGE ACCESS**

Request Additional Role  
*Required fields are marked with an asterisk (\*).*

Enter Organization Name \* :  [Cannot locate the Organization? ?](#)

Role \* :

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Selected Role Request

	Organization Name	Role	Data Dissemination System	Action
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If the organization does not exist in the EPPE System, select the **“Cannot locate the Organization?”** link.

# DUA Requester – Manage Access for New Role

## Add New Organization

### Request New Organization

Required fields are marked with an asterisk (\*). Please enter your  
Organization information.

Organization Name \* :

Address Type \* :  
 Domestic Address  International Address

Address Line 1 \* :

Address Line 2 :

Address Line 3 :

City \* :

State \* :

Country :

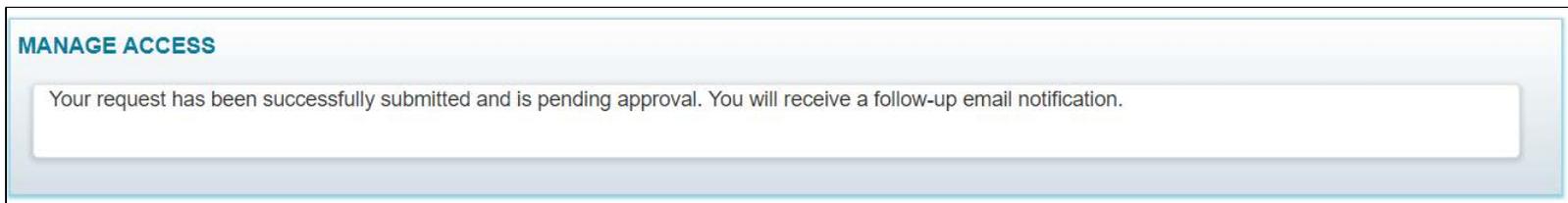
Zip Code \* :

Zip Code Extension :

1. The “Request New Organization” pop-up displays.
2. Enter the **Organization** information:
  - **Organization Name**
  - **Address Type:** Note this defaults to **Domestic Address**. Select **International Address**, if applicable.
  - **Address**
  - **City**
  - **State**
  - **Country** (if not US)
  - **Zip Code**
  - **Zip Code Extension** (optional)
3. Select the **Submit** button.

# DUA Requester – Manage Access for New Role

## Add New Organization Submission Confirmation



1. The **Confirmation** message displays: ***“Your request has been successfully submitted and is pending approval. You will receive a follow-up email notification.”***
2. A new Organization requires EPPE Administration Approval. Re-Start the Role request with the organization once the organization is approved.

# DUA Requester – Manage Access for New Role

## Select Organization

**MANAGE ACCESS**

Request Additional Role  
*Required fields are marked with an asterisk (\*).*

Enter Organization Name \*:  [Cannot locate the Organization? ?](#)

Role \*: 

- BEAUFORT-JASPER-HAMPTON COMPREHENSIVE HEALTH SERVICES, INC. (BJHCHS)
- HAMPTON FAMILY PRACTICE
- NORTHAMPTON COUNTY
- HAMPTON ROADS GOOD HELP ACO, LLC
- HAMPTON UNIVERSITY
- HAMPTON REGIONAL MEDICAL CENTER

Selected Role Request

Organization Name	Role	Data Dissemination System	Action
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1. The **Organization Name** drop down list displays based on the search criteria.
2. Select the **Organization** from the list.

**Note:** You must select the organization from the list.

# DUA Requester – Manage Access for New Role

## Select a Role

**MANAGE ACCESS**

Request Additional Role  
*Required fields are marked with an asterisk (\*).*

Enter Organization Name \*: HAMPTON UNIVERSITY Cannot locate the Organization? ?

Role \*:

- DUA REQUESTER
- DUA VIEWER

Selected Role Request

Organization Name	Role	Data Dissemination System	Action
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1. Place the cursor in the **Role** drop-down selection box to display a list of eligible roles for the organization.
2. Select the **DUA Requester** from the list.

**Note:** You must select the role from the list.

# DUA Requester – Manage Access for New Role

## Select a Role

**MANAGE ACCESS**

Request Additional Role  
*Required fields are marked with an asterisk (\*).*

Enter Organization Name \* :  [Cannot locate the Organization? ?](#)

Role \* :  x ▾

**Add**

Selected Role Request

Organization Name	Role	Data Dissemination System	Action
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**Quit** **Previous** **Submit**

1. The **Role** displays in the field.
2. Select the **Add** button.

# DUA Requester – Manage Access for New Role

## Select a Role

**MANAGE ACCESS**

Request Additional Role  
*Required fields are marked with an asterisk (\*).*

Enter Organization Name \* :  [Cannot locate the Organization? ?](#)

Role \* :

[Add](#)

Selected Role Request

	Organization Name	Role	Data Dissemination System	Action
1	HAMPTON UNIVERSITY	DUA REQUESTER		<a href="#">Remove</a>

[Quit](#) [Previous](#) [Submit](#)

1. The **Organization** and **Role** display in the table below.
2. You can add other role requests to the table.
3. Select the **Remove** link to remove a request from the table if applicable.
4. Select the **Submit** button.

# DUA Requester – Manage Access for New Role

## Role Request Acknowledgment

### MANAGE ACCESS

Your request has been successfully submitted and is pending approval. You will receive a follow-up email notification.

1. The **Manage Access** screen displays with the confirmation message.
2. The EPPE Administration Team will review the request and determine if it should be approved.

# DUA Requester – Manage Access for New Role

- Please refer to the **Remove a Role** training module for more information on removing a role in EPPE.
- Please refer to the **Requester Proxy Assignment** training module for more information on assigning a Requester Proxy.

# 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)**

[eppe@cms.hhs.gov](mailto:eppe@cms.hhs.gov)