

Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module -Requesting Additional Roles

Version 2.0 01/22/2024

Document Number: EPPE-194-CONT_DUAReq_RequestAddtionalRoles-v2.0

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1. Overview

This Training Guide will cover the following:

- How to Request for an Additional Role as a Contractor DUA Requester
- How to select an Organization.
- How to Remove a Role.

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: <u>https://www.cms.gov/files/document/eppeidm.pdf</u>
- Access CMS Portal: <u>https://portal.cms.gov/</u>

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.

?

CMS

2. Requesting Additional Roles

Log into EPPE. The Welcome screen is displayed.

Figure 1: EPPE Menu

	EPPE Enterprise Privac	y Policy Engir	e		Logged In As: DUA	Requester - Switch Roles 🕶		USER'S PROFILE
ñ	NEW / RE-USE DUA	MY DUA(S)	SHIPPED ORDERS	RE-ASSIGN DUA(S)	DUA SEARCH	223445	Q	ADVANCED SEARCH
We	lcome To EPI	PE						
EPPE	is an application that s	treamlines the p	process of requesting	data		Logged In As: D	UA Requester	
from t	he Centers for Medica	re & Medicaid S	ervices (CMS) via an	online Data Use Agreement (DUA)		Chapge		~

1. Select your **User ID** menu item ("USER'S PROFILE" in this example).

The view **User Profile** screen is displayed.

Figure 2: EPPE Roles

Current	Current EPPE Role(s)									
View Edit	t Current EPPE Role(s)	Pending EPPE Role Request(s)	Manage Proxy Assignment(s)	Curre	ent Proxy Assignment(s)					
F	REQUEST ROLE IN EPPE									
Your Curre	ent EPPE Role(s)									
ID ‡	Organization			÷	Role		¢	Date Added	÷	Actions
100023	The Jedi Camp				DUA Requester			01/02/2024		🛱 Remove

- 2. Click the Current EPPE Role(s) tab.
- 3. Click the **REQUEST ROLE IN EPPE** button.

The Request Additional Role screen is displayed.

Figure 3: Request an Additional Role

Request Role In E	PPE	
Organization Name	•	
Please select your o	organization	•
<u>Cannot locate your C</u>	organization?	
Role*		
Please select your o	organization first	•
Please select the app	propriate role from available items.	

4. Start typing the **Organization Name** to display a list of organizations matching the search criteria.

If the Organization **does not** exist in the EPPE System, it will have to be added.

2.1 Select Organization

The Organization Name dropdown list is displayed based on the search criteria.

Figure 4: Submit Role Request

Request Role In EP	PE
Organization Name*	
Test Org	•
Cannot locate your Or	ganization?
Cannot locate your Or Role* DUA Viewer	ganization?
Cannot locate your Or Role* DUA Viewer Please select the appr	ganization? priate role from available items.

- 1. Select the Organization.
- 2. Select the Role.
- 3. Click Submit.

The Organization and any Roles are displayed in the table. You can add another role request to the table.

The Manage Access screen is displayed with the confirmation message, "Your role request for [EPPE Role] with [Organization] has been submitted for review and approval.."

Figure 5: Role Request Acknowledgement

Your role request for DUA Viewer with Test has been submitted for review and approval. (reference number 20032)						
Penc	ling	EPPE Role R	equest(s)			
View Edit Current EPPE Role(s) Pending EPPE Role Request(s) Manage Proxy Assignment(s) Current Proxy Assignment(s)						

Note: The EPPE Administration Team will review the request and determine if it should be approved.

Figure 6: Cannot Locate the Organization

Request Role In EPPE	
Organization Name*	

4. If the organization does not exist in the EPPE System, click the *Cannot locate the Organization?* link.

The Add New Organization pop-up is displayed.

Figure 7: Add New Organization Pop-Up

Add New Organization	×
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*	
Submit Ca	ncel

- 5. Enter the Organization information:
 - Organization Name
 - Street Address
 - City
 - State/Province
 - ZIP
- 6. Click Submit.

The Confirmation message, "[New Organization] was created and is pending approval. Once approved, you will be able to select them for new DUA(s)." is displayed.

Figure 8: Add New Organization Submission Confirmation

0	User Guide Example Org was created and is pending approval. Once approved, you will be able to select them for new DUA(s).							
Penc	Pending EPPE Role Request(s)							
View	Edit	Current EPPE Role(s)	Pending EPPE Role Request(s)	Manage Proxy Assignment(s)	Current Proxy Assignment(s)			
	REQUEST ROLE IN EPPE							

Note: A new Organization requires EPPE Administration Approval. Re-Start the Role request with the organization once the organization is approved.

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) eppe@cms.hhs.gov