

Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module -Requesting EPPE CMS Contact (COR) Role

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1. Overview

This Training Guide will cover the following:

• How to Request for the CMS Contact COR 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.

?

2. EPPE CMS Contact (COR) Role

Navigate to the CMS.gov website: <u>https://portal.cms.gov</u>.

Figure 1: Login Screen

CMS.gov Enterprise Portal	
UserID	
Password	
✓ Agree to our <u>Terms & Conditions</u>	
Login	
Forgot your <u>User ID</u> or your <u>Password</u> ?	

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

The MFA page displays.

Figure 2: Multi-Factor Authentication (MFA)



3. Select **Email** as the MFA option. Email is the default option and will always be available. The MFA page displays.

Figure 3: MFA Screen: Send MFA Code

Login	Login with PIV Card	
		terprise Portal
v	Multi-factor Auth	entication
E	mail	~
	Send MF	A Code
E	nter MFA Code	
	Veri	fy
	Send MFA code automa	tically
30	Do not challenge me on minutes	this device for the next
Lea	irn how to add MFA Devi	<u>ces beyond email</u>
Un	able to Access MFA Devic	e or MFA Code?
		Cancel

- 4. Click Send MFA Code. An email will be sent to your registered email address.
- 5. Enter the MFA Code received in the email in the MFA Code field and click Verify.

The CMS Enterprise Portal Welcome Screen displays with the EPPE Application tile.

Figure 4: My Portal: EPPE Tile



6. Click the **EPPE** application tile.

Figure 5: CMS Portal: Request a Role in EPPE

My Portal	Add Application
CTA EPPE	Previous Login: <u>View Login History</u>
EPPE	

7. Click Application to access the EPPE system.

The Request a Role page is displayed.

Figure 6: Request a Role Screen

CMS	gov My Enterprise Portal		🔳 My Apps		٠	🕒 <u>Charlie Brown</u> 🔻	🖲 <u>Help</u>	🕞 Log Out
	EPPE Enterprise Privacy Policy Engine					USER GUIDES	CHAR	LIEBROWN
(Welcome, Charlie Brown. This is your first login.							
	Welcome to EPPE							
	Note: Our records indicate that you are a first-time user w	ith EPPE or a user with no active role i	in EPPE. You must be associated with one or more organization:	s and be associated with one or r	more r	oles to use EPPE.		
	Select < Request Role in EPPE > if you wish to request a ro	ole and organization assignment.						
	If you have questions, please contact the EPPE help desk	at 844-EPPEDUA (844-377-3382) or EP	PPE@cms.hhs.gov.					
	Request Role in EPPE							
You	r Pending Role Request(s)							
								_
ID	Crganization	Requested Role	Date Requested	÷		Actions		
		You do not have any pending role	requests. Use the Request Role in EPPE button above above to r	equest a role.				
Dis	twine 0 - 0 of 0							
0.0								

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

The Request a Role in EPPE pop-up is displayed.

Figure 7: Request Role Pop-Up

r organiza				
o Guinza	tion			•
r Organiza	tion?			
r organiza	tion first			•
	r Organiza r organiza	<u>r Organization?</u> r organization first	r Organization?	r Organization? r organization first

- 9. Select your **Organization Name** from the dropdown menu.
- 10. Select the CMS Contact (COR) role from the dropdown.
- 11. Click the **Submit** button.

Figure 8: Attestation

Request Role In EPPE					×
Request Role In EPPE	Attestation				
Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the <u>EPPE web page</u> .					
□ I agree.*					
	Previou	s	Sub	mit	Cancel

- 12. Select the *I agree* checkbox.
- 13. Click the **Submit** button.

Note: The Attestation Message does not appear if you remove and re-add the role.

The EPPE role request submission acknowledgement, "Your role request for [EPPE Role] with [Organization] has been submitted for review and approval." Is displayed.

Figure 9: EPPE Role Request Acknowledgement

0	Sur role request for DUA Viewer with HCD Organization has been submitted for review and approval. (reference number 20030)						
Pene	Pending EPPE Role Request(s)						
View	Edit	Current EPPE Role(s)	Pending EPPE Role Request(s)				
	REQUEST ROLE IN EPPE						
Your F	Your Pending Role Request(s)						
ID	÷	Organization	Reques	ted Role 🗘	Date Requested	÷	Actions

The EPPE Administration (EPPE Admin) team will review for approval.

3. Acronyms

The following are acronyms used within the EPPE system.

Table 1: Acronyms

Acronym	Definition
EPPE	Enterprise Privacy Policy Engine
DUA	Data Use Agreement
CMS	Centers for Medicare and Medicaid Services
IDM	Identity Management
MFA	Multi-Factor Authentication
COR	CMS Contact (COR)
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