

Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

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

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1. Overview

This Training Guide will cover the following:

• How to request additional user roles.

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. Requesting Additional Role(s)

Note: All instructions below are intended for the CMS Contact (COR) user.

Log in to the EPPE Application. The Welcome screen is displayed.

Figure 1: EPPE Welcome Screen

0	EPPE Enterprise Privacy Po	olicy Engine		Logged In As: CMS Contact (COR) - Switch Roles -					
ñ	DUA: PENDING ACTIONS	RE-ASSIGN REQUEST(S)	SHIPPED ORDERS	DUA SEARCH Search by DUA Number Q	ADVANCED SEARCH				
Wel	come To EPPE	8							
EPPE i	EPPE is an application that streamlines the process of requesting data								
from t	he Centers for Medicare &	Medicaid Services (CMS)	ia an online Data Us	Agreement (DIIA)					

1. Click your **USER ID** top menu item (shown as "USER'S PROFILE" in this example).

The User Profile screen will be displayed.

Figure 2: EPPE Roles

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

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

The **Request Role in EPPE** pop-up will be displayed. The Organization Name dropdown will be displayed based on the search criteria.

Figure 3: Request Role In EPPE Pop-Up

Request Role In EPPE		
Organization Name*		
Please select your organi	zation	•
Role*		
	zation first	•
Please select your organi Please select the appropri	ate role from available items.	

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

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

Figure 4: Role Selection Menu

Request Role In EPPE		
Please select your organization		•
Cannot locate your Organization?		
Role*		
Please select your organization firs	t	•
Please select the appropriate role fro	om available items.	

The Role dropdown contains a list of eligible roles for the organization.

- 5. Select a **Role** from the dropdown menu.
- 6. Click Submit.

Note: A role must be selected from the list.

Figure 5: Role Request Confirmation

Vour role request for <i>DUA Viewer</i> with Test has been submitted for review and approval. (reference number 20032)									
- Pending EPPE Role Request(s)									
View	Edit	Current EPPE Role(s)	Pending EPPE Role Request(s)	Manage Proxy Assignment(s)	Current Proxy Assignment(s)				

The Confirmation Message of the Role Request is displayed.

The Organization and Role are displayed in the table. Other role requests can be added.

Note: CMS will review and provide approval prior to receiving the requested role.

2.1 Add a New Organization

In this example, we are adding a new organization.

Figure 6: Request Additional Role: Cannot Locate Your Organization

Request Role In EPPE		
Organization Name*	 	
Please select your organization		•

1. From the Request a Role in the EPPE screen, click the **Cannot locate your Organization?** hyperlink.

The Add New Organization pop-up will be displayed.

Figure 7: Add New Organization Details

Add New Organization		×
The new organization will be available for you to select only upon approval. Do you wish to continue with the request?		Í
Organization Name*		
Country United States		
Street address*		
State*	\$	
	Submit	<u>Cancel</u>

- 2. Enter the Organization information:
 - Organization Name
 - Street Address
 - City
 - State
 - ZIP
- 3. Click **Submit**.

The Confirmation message, "[Requested Organization Name] 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

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)						
	RE	QUEST 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

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