



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

Enterprise Privacy Policy Engine (EPPE)



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

Training Topics

Training Topics in This Module

- EPPE 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 ROLE(S)

COR – Requesting Additional Role(s)

EPPE Menu

The screenshot shows the EPPE application interface. On the left is a vertical menu with the following items: EPPE Home, DUA(s), DUA(s) - Pending Actions, Extension Request(s), DUA(s) - Pending Extensions, Re-Assign Request(s), Pending Change Contact Request(s), Search, DUA Search, My Access, Manage Access (highlighted with a red box), My Preference(s), Email Preference, and Exit EPPE. The main content area on the right is titled 'Welcome to EPPE' and contains the following text: '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. • LDS Approval Workflow.'

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

COR – Requesting Additional Role(s)

EPPE Roles Display

MANAGE ACCESS

Please log out and log back in to confirm your request has been processed.

My Roles

Organization Name	Role	Data Dissemination System	Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	RESEARCH DATA ASSISTANCE CENTER (ResDAC)		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	EPPE ADMINISTRATOR		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	DATA ENTRY		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	NON DUA DATA ENTRY		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	CMS CONTACT (COR)		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	ADVISORY BOARD COORDINATOR		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	CONTRACTOR DUA MANAGEMENT TEAM		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	RESEARCHER DUA MANAGEMENT TEAM		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	PAYMENT COORDINATOR		Remove
BOSTON UNIVERSITY	DUA REQUESTER		Remove
UNIVERSITY OF MARYLAND	DUA REQUESTER		Remove
GEORGE WASHINGTON UNIVERSITY (GWU)	DUA REQUESTER		Remove

Select an option *

- Request Additional Role ?
- Proxy Role ?

Next

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

COR – Requesting Additional Role(s)

Select Organization

MANAGE ACCESS

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

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

Role * :

Selected Role Request

Organization Name	Role	Data Dissemination System	Action
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1. The **Manage Access** screen displays to **Request an Additional Role**.
2. Enter the **Organization Name** to which you need access to display a list of organizations matching the search criteria - in this example enter CMS.

COR – Requesting Additional Role(s)

Select Organization

MANAGE ACCESS

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

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

Role *:

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.

COR – Requesting Additional Role(s)

Add New Organization

MANAGE ACCESS

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

Enter Organization Name *: Search by entering at least 3 characters [Cannot locate the Organization?](#) ⓘ

Role *: Select an Option

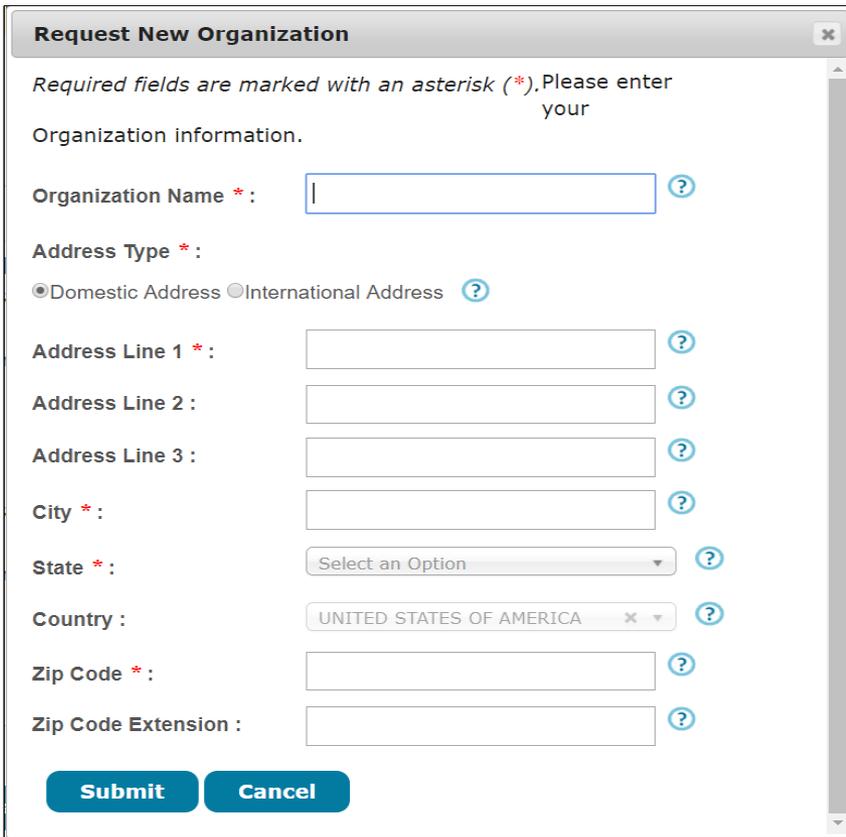
Selected Role Request

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.

COR – Requesting Additional Role(s)

Add New Organization



Request New Organization [X]

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 : ?

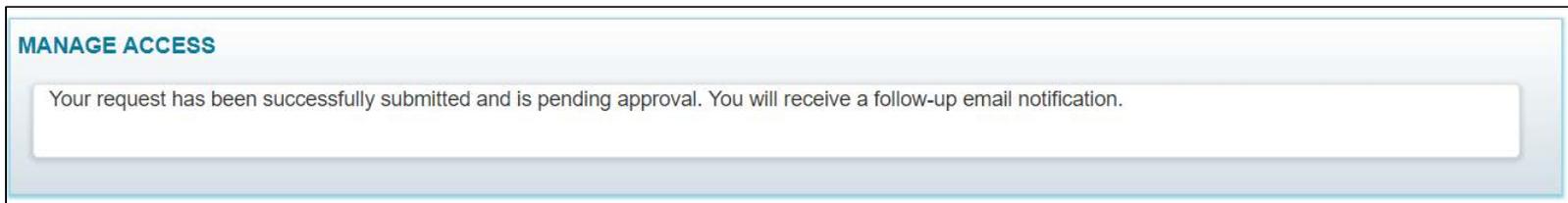
Zip Code * : ?

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. This occurs rarely
 - **Address**
 - **City**
 - **State**
 - **Country** (if not US)
 - **Zip Code**
 - **Zip Code Extension** (optional)
3. Select the **Submit** button.

COR – Requesting Additional Role(s)

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.

COR – Requesting Additional Role(s)

Select a Role

MANAGE ACCESS

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

Enter Organization Name * : CENTERS FOR MEDICARE AND MEDICAID SERVICES (CM: [Cannot locate the Organization? ?](#))

Role * :
Select an Option
DUA VIEWER
LIMITED DATA SET DUA MANAGEMENT TEAM
NON DUA DATA ENTRY
NON-DUA VIEWER
PAYMENT COORDINATOR
PRIVACY BOARD CHAIR
QE DUA MANAGEMENT TEAM
RESEARCH DATA ASSISTANCE CENTER (ResDAC)
RESEARCHER DUA MANAGEMENT TEAM
SHIPPER

Organization	Action

Quit Previous Submit

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.

COR – Requesting Additional Role(s)

Select a Role

MANAGE ACCESS

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

Enter Organization Name *: CENTERS FOR MEDICARE AND MEDICAID SERVICES (CM: [Cannot locate the Organization? ?](#))

Role *: NON-DUA VIEWER

Selected Role Request

Organization Name	Role	Data Dissemination System	Action
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1. The **Role** displays in the field.
2. Select the **Add** button.

COR – Requesting Additional Role(s)

Select a Role

MANAGE ACCESS

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

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

Role * :

Selected Role Request

	Organization Name	Role	Data Dissemination System	Action
1	CENTERS FOR MEDICARE AND MEDICAID SERVICES (CMS)	NON-DUA VIEWER		Remove

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.

COR – Requesting Additional Role(s)

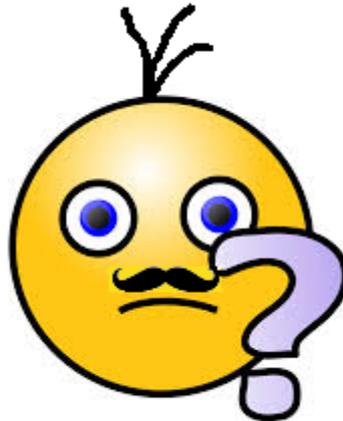
Role Request Acknowledgment

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.
3. Once a role is approved the user will have to log off and log back on in order to see the new role.

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