Medicare Advantage Prescription Drug (MAPD) Tailored External Point of Contact (EPOC) Report Role

Summary: This document illustrates the steps necessary for users with an EPOC role to request the "Tailored Reports User" role, as well as how to access and use the reports. Please see the table of contents below for links to the specific area of this guide.

Prerequisite: To gain access to this role and the reports, the user must be an active EPOC for a MAPD Plan. EPOCs only have access to reports for their Plan Contract Number(s).

If you need assistance requesting the MAPD EPOC role, please review the following document link https://www.cms.gov/files/document/epoc-role-request-guide.pdf.

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EPOC Requesting MAPD Tailored EPOC Report Role

Step 1: The EPOC will log in to <u>https://portal.cms.gov/portal/</u> and select the "Add Application" button.



Step 2: Select the "Identity Management (IDM) Reports" application from the "Select an Application" drop-down list on the "Request Application Access" page.



Step 3: Select the "CMS IDM" link on the "Request Application Access" page.



Note: You will be redirected to the IDM UI page (https://home.idm.cms.gov/).

Step 4: Select the "Role Request" tile. You will be redirected to the "Role Request" page.



Select "IDM Reports" application from the application drop-down list.

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Step 5: Select the group "I have been directed by my CMS application business owner to request this role for a specific report to which I have been granted access." from the "Select a Group" drop-down list.

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Note: The "Selected Group" section will update to "Application End User."

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Step 6: Select the "Tailored Reports User" role from the "Select a Role" drop-down list.

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Step 7: Select the "MARx – Medicare Advantage & Prescription Drug System" application from the "Select Application for Ad-Hoc Report" drop-down list.

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Step 8: Select "EPOC Reports" from the "Available" shuttle box.

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Note: When the selection is made, "EPOC Reports" will move to the "Selected" shuttle box. If it does not move automatically, please use the green arrow button to move the report to the "Selected" shuttle box.

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Step 9: Select the "Review Request" button to review the role request.

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Step 10: Enter the reason for the request and click on the "Submit Role Request" button.

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Note: You should receive this confirmation page.

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Step 11: Refresh the page to see the "My Reports" tile.

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Generating EPOC Report

Step 1: Log into the IDM UI (<u>https://home.idm.cms.gov/</u>).





Step 3: Select the "Generic EPOC Report" report from the drop-down list.

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Step 4: You should see the report that contains all the user details belonging to the same contract as the logged in EPOC user.

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Step 5: To export the report, please click anywhere on the result data (indicated by the yellow box) and the menu bar will be visible (indicated within the red circle).

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Note: DO NOT CLICK within this menu indicated in red to display the "Menu Options".

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Step 6: Select the "Menu Options" (three dots) and you can see the two options to export.

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