

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

### Enterprise Privacy Policy Engine (EPPE)







#### **User Registration Process**

## Topics List

- EPPE Overview
- EIDM Introduction
- Multi-Factor Authentication (MFA)
- Symantec VIP Access
- EIDM New User/Request Access
- EPPE Requesting Access to EPPE
- Requesting an EPPE User Role

#### **EPPE Overview**

The goal of the EPPE application is to replace the manual process of requesting and processing CMS Data Use Agreements (DUA) by allowing DUA business partners to submit their requests on-line, thereby reducing processing time for DUA requests.

Today, the data entry role can manage DUA requests for the following DUA customer types:

- Contractor
- Limited Data Sets
- Researcher
- Non-DUA Tracking Requests

#### EIDM – Introduction

#### **EIDM** – Introduction

The CMS Enterprise Portal will provide users with access to request Enterprise Identity Management (EIDM) User ID. EIDM provides users with a way to obtain a single User ID to access multiple CMS applications. Users must apply for and be approved for a User ID.

To apply and receive a EIDM User ID, complete the steps that follow.

### Multi-Factor Authentication (MFA)

Multi-factor authentication is generally required to access CMS sensitive data. Multi-factor authentication uses a combination of two (or more) different token attributes (also known as factors), to authenticate the user.

- The first is what users know. This is usually a password, but this can also include a user response to a secret challenge question. (This is generally known as Knowledge Based Authentication, and by itself, is insufficient for authentication to most CMS sensitive information.)
- The second is what users have. This could be a physical object (hard token), for example, a smart card, or hardware token that generates one-time-only passwords. It might also be some encrypted software token (soft token) installed on an individual's system (usually with very limited functional parameters for use).
- The third is who users are, as indicated by some biometric characteristic such as a fingerprint or an iris pattern.

### Multi-Factor Authentication (MFA)

Two-factor authentication means that instead of using only one single type of authentication token or factor, such as only things a user knows (passwords, shared secrets, solicited personal information, etc.), a second token or factor, something the user has or something the user is, must also be supplied in order to complete the authentication process.

The first CMS authentication requirement is the User ID and Password (what a user knows).

The second CMS authentication requirements is utilizing the Symantec Validation & ID Protection software which will provide a security code (what a user has).

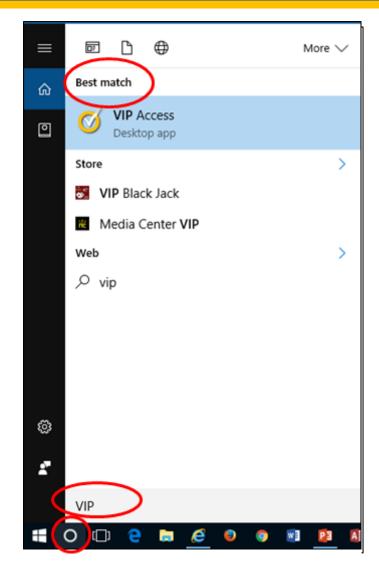
The Symantec VIP software should be installed on the computer prior to requesting an EIDM User ID.

### Symantec VIP Access

- 1. To search your laptop for the VIP software click on the **Ask me** anything icon.
- 2. In the search area type "VIP".
- 3. If the VIP software is installed on the laptop it would show in the list of **Best Match**.

**Note:** CMS employees should contact the CMS Service Desk if the VIP Access software is not installed on the device.

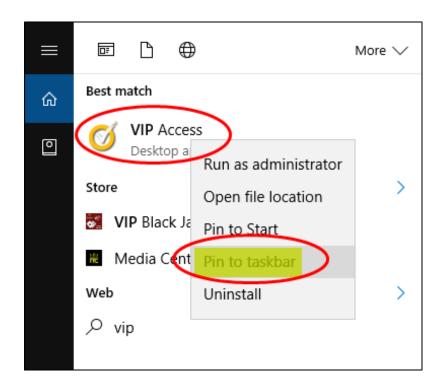
All others may download the VIP Access software at <a href="https://idprotect.vip.symantec.com/">https://idprotect.vip.symantec.com/</a>. Also, depending on your device's configuration you may need to contact your local IT department to complete the installation.



### Symantec VIP Access

Follow the steps below to pin the VIP Access to your task bar.

- 1. Right-click VIP Access
- 2. Left click Pin to Taskbar.



### Symantec VIP Access

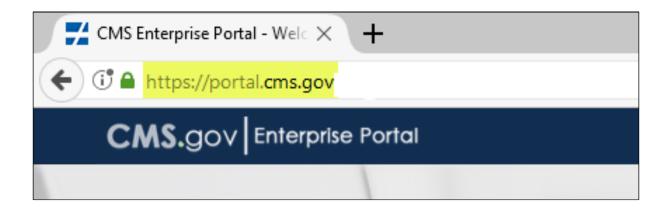
When clicking the **VIP Access** icon on the taskbar the VIP Access window displays.

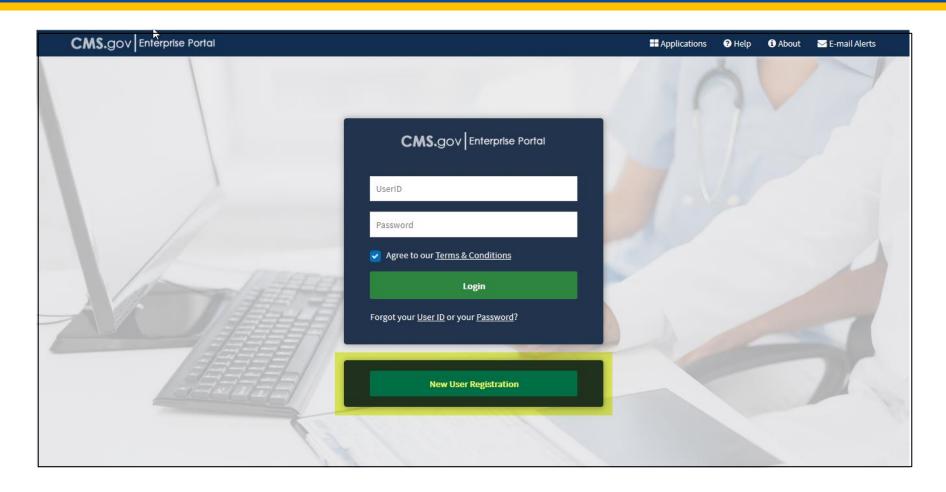


- 1. The **Credential ID** is needed during the EIDM Registration process and will tie the VIP Access software to your EIDM User ID.
- 2. The **Security Code** will refresh every 30 seconds and is needed every time the user logs into the EIDM portal.

Enter the following URL in your browsers' address box:

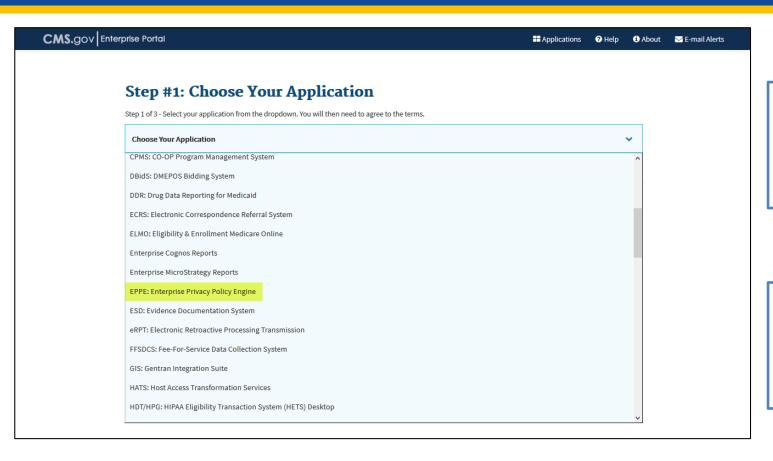
https://portal.cms.gov





The CMS Enterprise Portal page displays.

Click on **New User Registration**.

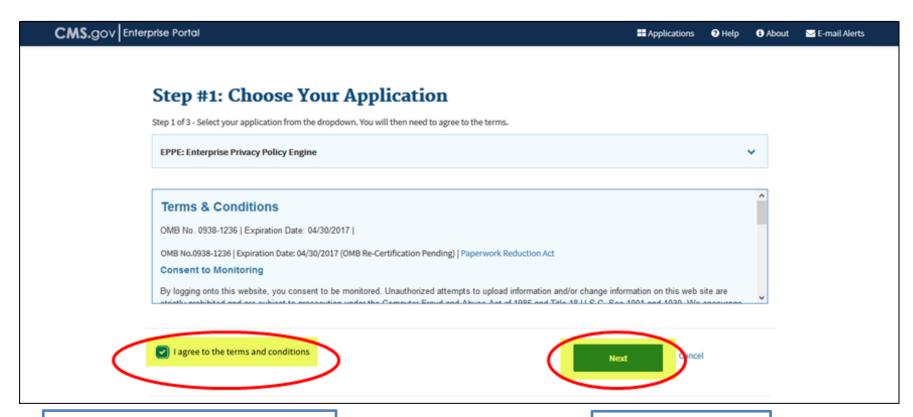


Step #1: Chose Your Application page displays.

Select EPPE: Enterprise Privacy Policy Engine

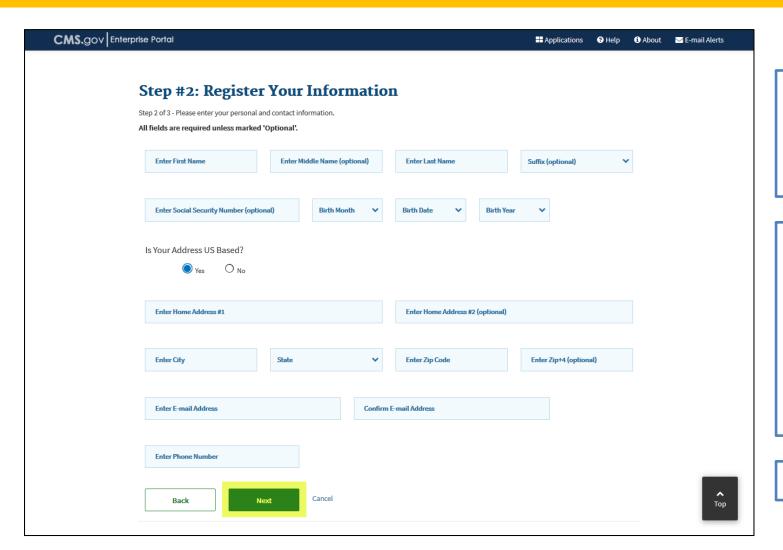
<u>Note:</u> Each time EPPE is accessed, the User ID and Password need to be entered; users have to agree to the Terms and Conditions; and the Symantec VIP Access Security Code has to be entered.

The **Terms and Conditions** display.



1. Place a checkmark in the *I agree to the terms and* conditions check box.

2. Click on Next.

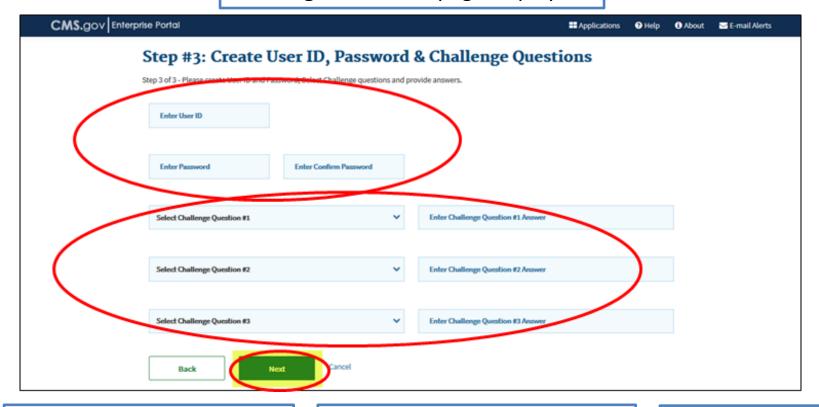


Step #2: Register Your Information page displays.

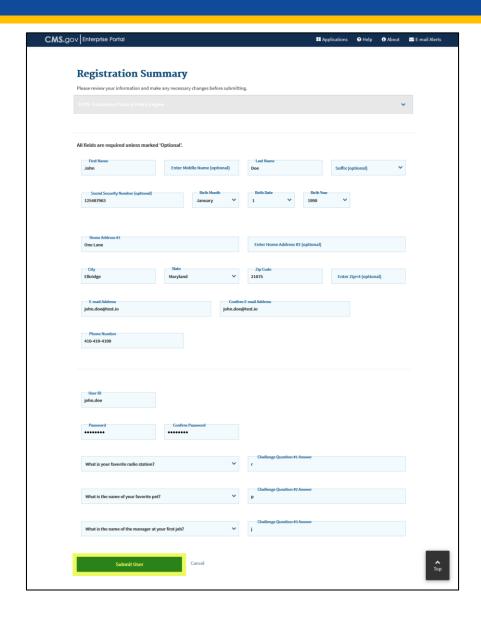
Complete all required information on the **Register Your Information**page.

Click on Next.

Step #3: Create User ID, Password & Challenge Questions page displays.



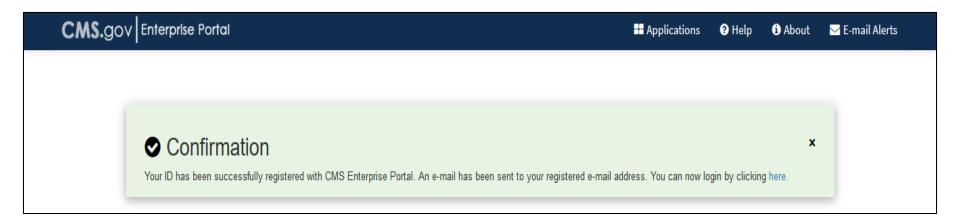
- 1. Enter the **User ID** and **Password**, and confirm the password.
- 2. Select **Challenge Questions** and **Answers**.
- 3. Click on Next.



The **Registration Summary** page displays.

Please review the entered information and then Click on **Submit User**.

The **Confirmation** page displays.



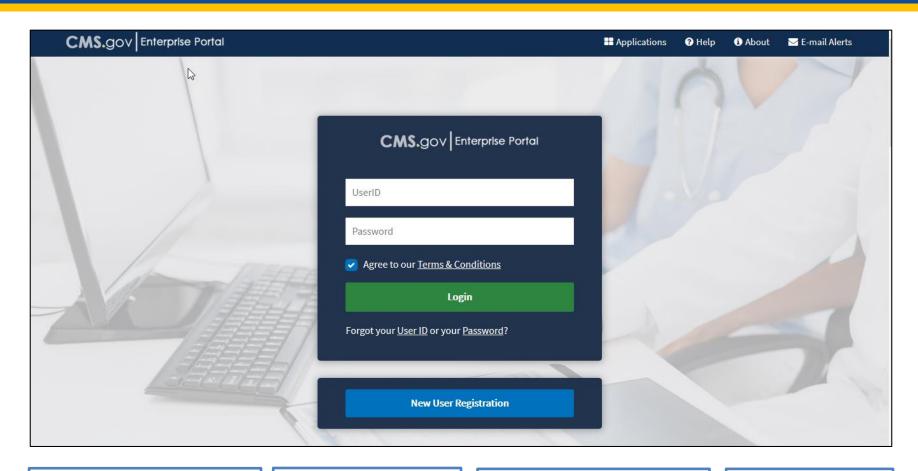
The EIDM registration process is now complete. You will receive an email notifying you of the successful creation of your account.

### EPPE- New User/ Role Request

# Requesting EPPE Access/User Role



**Please Note**: Users must have received the EIDM registration approval email prior to requesting access to EPPE.



Go to the **CMS.gov** website:

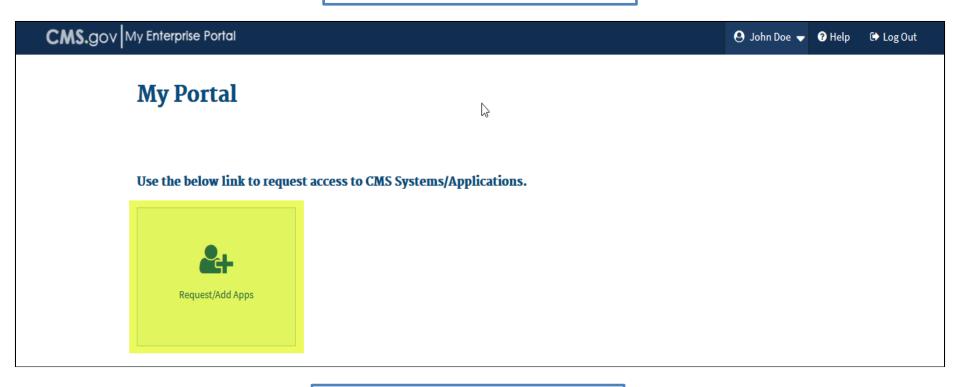
https://portal.cms.gov

Enter **UserID** and **Password**.

Click on the checkbox to Agree to our Terms & Conditions.

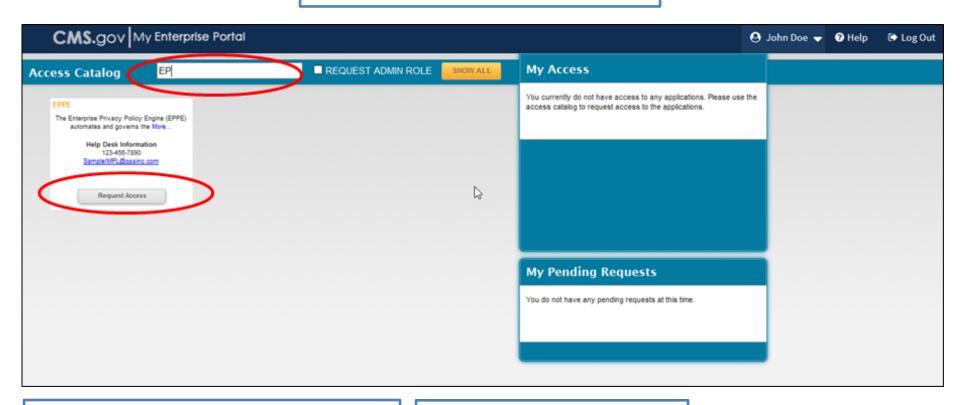
Click on **Login**.

The My Portal page displays.



Click on Request/Add Apps

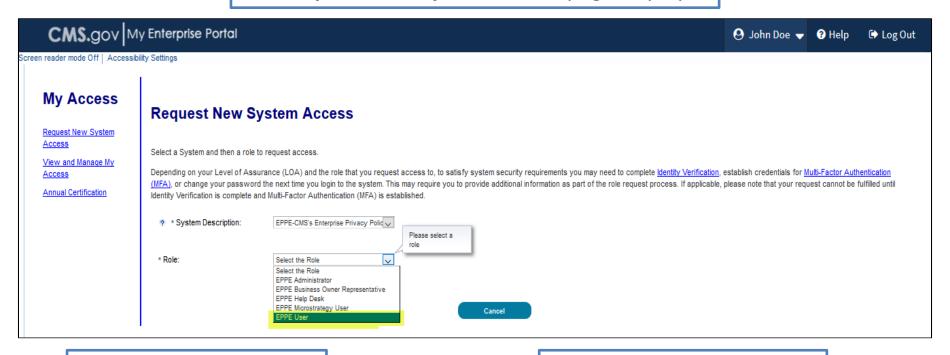
The Access Catalog page displays.



1. Begin typing "EPPE" in the Access Catalog field. Upon entering the first two letters, the EPPE application will appear.

2. Click Request Access.

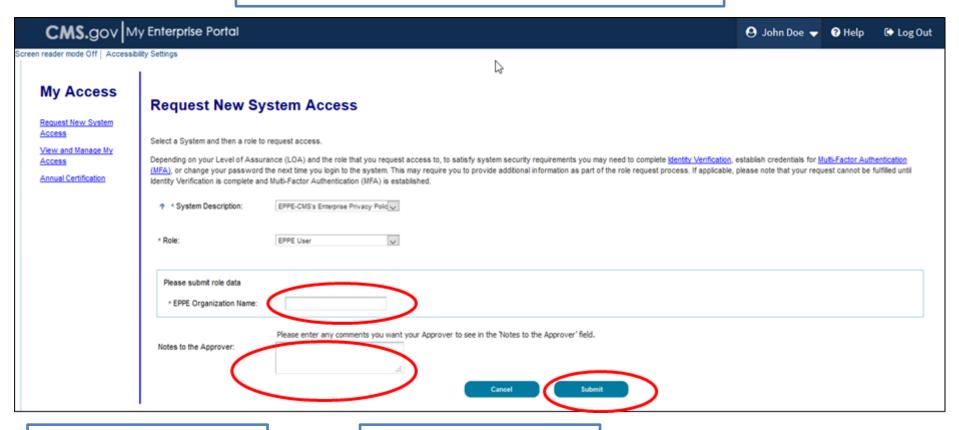
The Request New System Access page displays.



The **System Description** field is populated by default.

Click on the **Role** field and select **EPPE User** from the drop-down.

The Request New System Access page displays.



1. Enter the **EPPE Organization Name.** 

Notes to theApprover is optional.

3. Click on Submit.

After successfully gaining EIDM access credentials and requesting access to the EPPE application the user will be guided through the Remote Identity Proofing (RIDP) process.

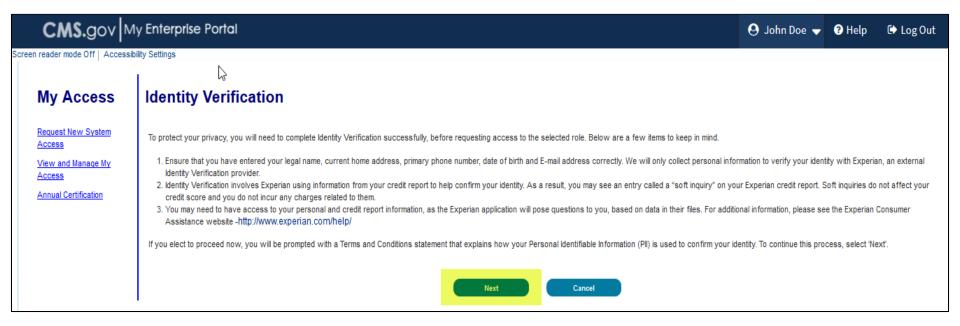
RIDP is the process of validating sufficient information about you (e.g., credit history, personal demographic information, and other indicators) to uniquely identify you. If you are requesting electronic access to protected CMS information or systems, you must be identity proofed to gain access. CMS uses Experian, an external identification verification provider, to remotely perform identity proofing.

Users may have already encountered RIDP through various interactions with banking systems, credit reporting agencies, and shipping companies. The Experian identity verification service is used by CMS to confirm your identity when users access a protected CMS Application. When users log in to the CMS system and request access to EPPE, they will be prompted to RIDP if they have not been previously identity proofed to the level of assurance required by the EPPE. Users will be asked to provide a set of core credentials which include:

- Full Legal Name
- Social Security Number (may be optional)
- Date of Birth
- Current Residential Address
- Personal Phone Number

The Experian identity verification service will use the user's core credentials to locate their personal information in Experian and generate a set of questions, referred to as out-of-wallet questions. Experian will attempt to verify their identity to the appropriate level of assurance with the information they provided. Most users are able to complete the ID proofing process in less than five minutes. If users encounter problems with RIDP, they will be asked to contact Experian Support Services via phone to resolve any issues.

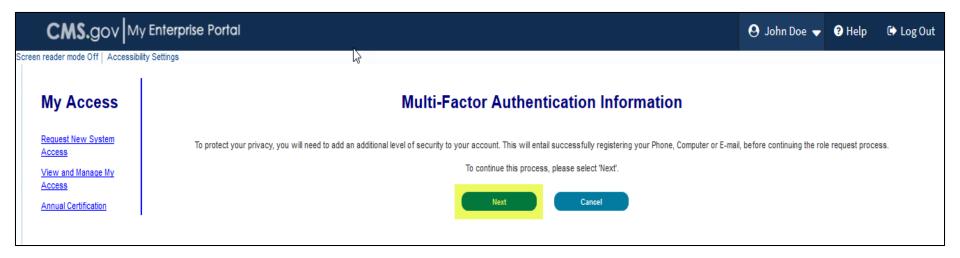
The **Identity Verification** page displays.



By clicking on **Next** the Remote Identity Proofing (RIDP) process will be initiated.

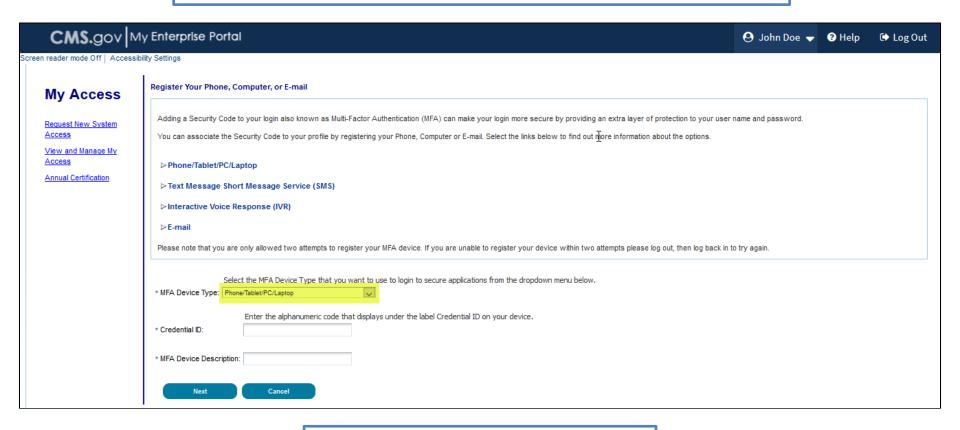
**Note:** Because of privacy requirements additional RIDP pages cannot be displayed.

The Multi-Factor Authentication (MFA) Information page displays.



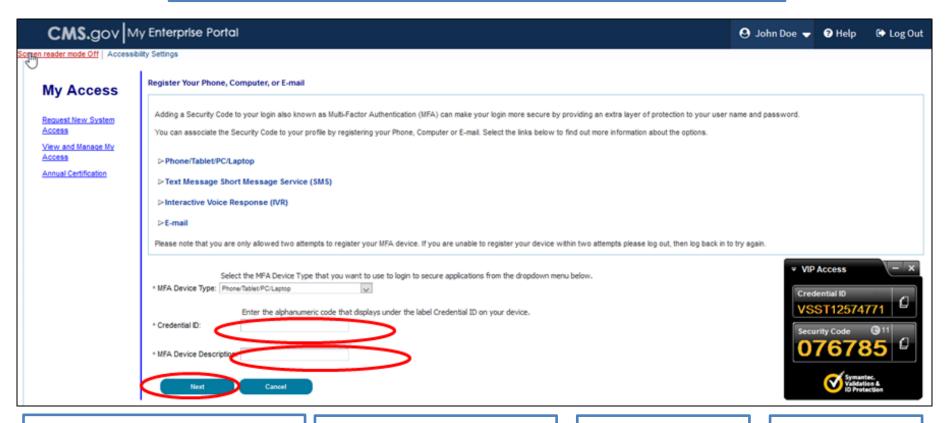
Click Next.

The **Register Your Phone, Computer or Email** page displays.



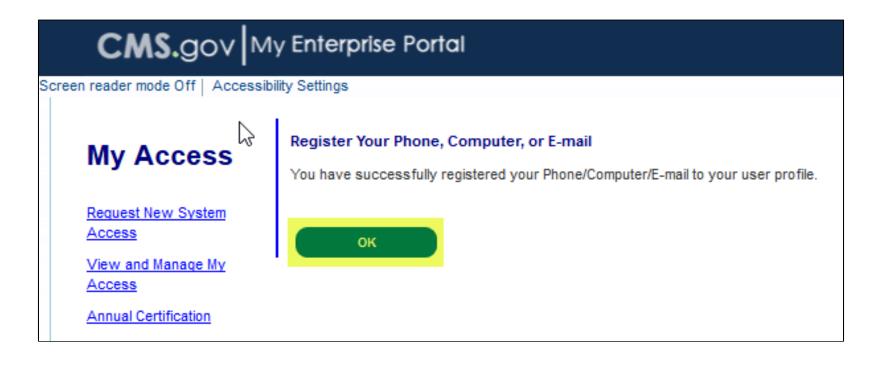
Select Phone/Tablet/PC/Laptop from the MFA Device Type dropdown list.

The Register Your Phone, Computer, or E-mail page displays.



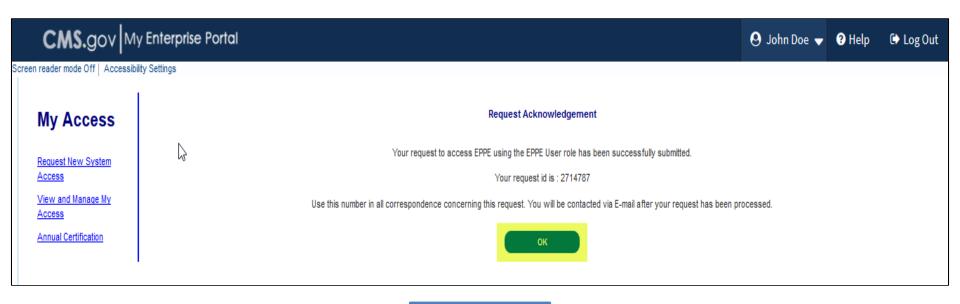
- 1. Click the copy button next to the Symantec VIP Access/Credential ID.
- 2. Paste the Credential ID into the **Credential ID** field.
- 3. Enter a MFA Device Description.
- 4. Click Next.

The **Confirmation** page displays.



Click on **OK**.

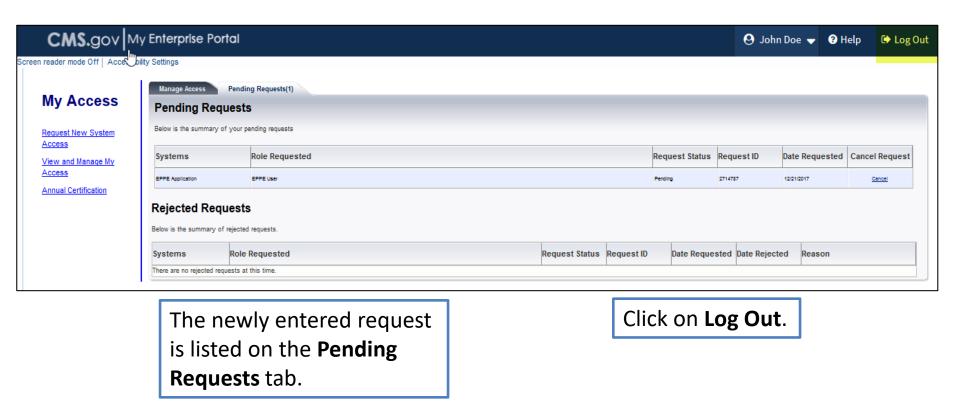
The **Request Acknowledgement** page displays.



Click on **OK**.

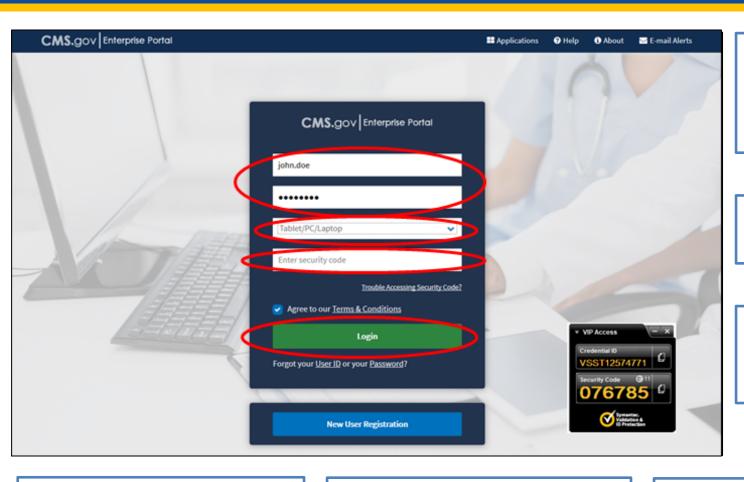
**Note:** Your request is issued an Request ID number. Use this number for all correspondence regarding this request.

The Manage Access/Pending Requests tab displays.



**Note:** The request has to be approved. An email will be sent once the pending request was approved. After access is granted, log into to the **CMS Secure Portal**.

### EPPE - Requesting an EPPE User Role



Go to the **CMS.gov** website:

https://portal.cms.g

1. Enter your Login Credentials.

2. Select **Phone/Tablet/PC/ Laptop.** 

- 3. Click the copy button next to the **Symantec VIP Access Security Code**.
- 4. Paste the **Security Code** into the **Security Code** field.

5. Click on Log In.

### EPPE - Requesting an EPPE User Role

The Welcome to CMS Enterprise Portal page displays.

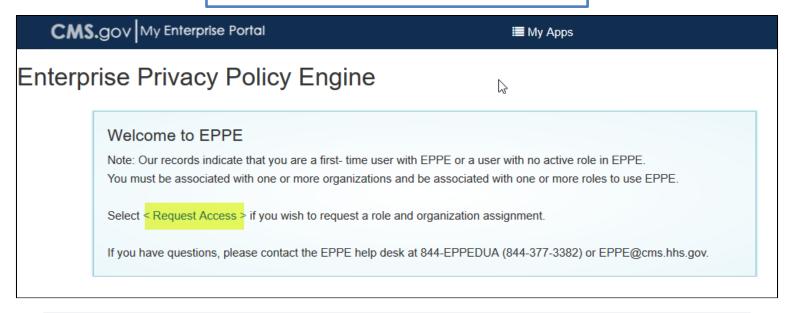


1. Click on **EPPE**.

2. Select Application.

### EPPE - New User/Role Request

The **Welcome to EPPE** page displays.



The user requested access to the EPPE application previously, now the user must request the type of User Role needed for the system. The system will recognize a new user with no active role in EPPE.

Click the link to begin the **EPPE Role Request** process.

### EPPE New User/Role Request

The **EPPE Role Request** page displays.



- 1. Enter the **Organization Name**. Entering at least three characters of the name will display a list of organization names to choose from.
- 2. Select the appropriate **Role**.
- 3. Click on Add.

**Note:** A selection from the results' dropdown list has to be made.

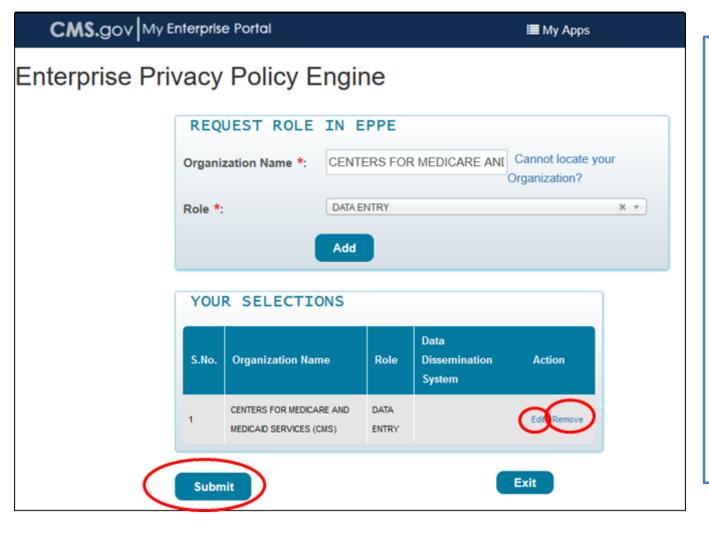
### EPPE New User/Role Request

The **EPPE Role Request** page displays.

CMS.gov My Enterprise Portal		<b>≣</b> My Apps		
Enterprise Privacy Policy Engine				
REQUEST ROLE IN EPPE				
	Organization Name *: Search by entering at least 3 cha  Cannot locate your  Organization?			
	Role *: Select an Option			▼
		Add		
	YOUR SELECTIONS			
	S.No. Organization Nat	ne Role	Data Dissemination Syste	m Action
			E	xit

If the Organization is not listed, click the **Cannot locate the Organization?** link to submit a request to add an organization.

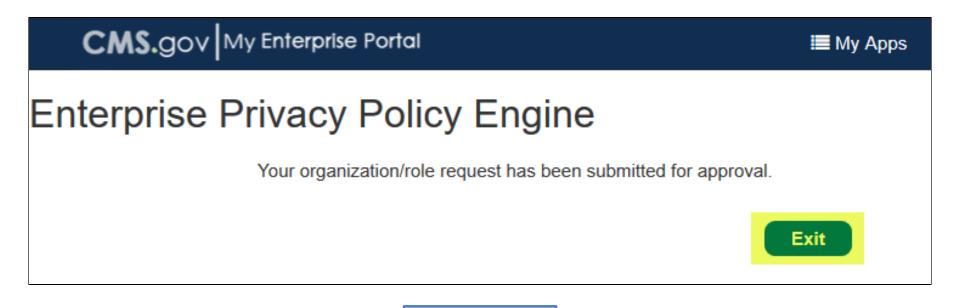
### EPPE - New User/Role Request



Multiple roles can be requested.

- 1. You may edit the role request by clicking on **Edit.**
- 2. Remove a role request from the selection table by clicking on **Remove**.
- 3. After adding the role(s) to the selection table, click on **Submit**.

### EPPE - New User/Role Request



**Note:** The EPPE Admin now has to approve the role(s) request. An email will be sent once the role has been approved.

Click on Exit.

### EPPE - New User/ Role Request



#### **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