Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - Requesting Additional Roles

Version 2.0

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1.   Overview

This Training Guide will cover the following:

- How to Request for an Additional Role as a Contractor DUA Requester
- How to select an Organization.
- How to Remove a 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: https://www.cms.gov/files/document/eppeidm.pdf
- Access CMS Portal: https://portal.cms.gov/

1.2   Icons Used Throughout the EPPE System

✱ A red asterisk denotes that a field is required to be entered.
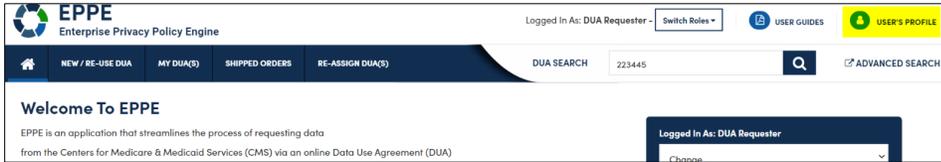
? The question mark icon, when selected, will display field specific help.

2.   Requesting Additional Roles

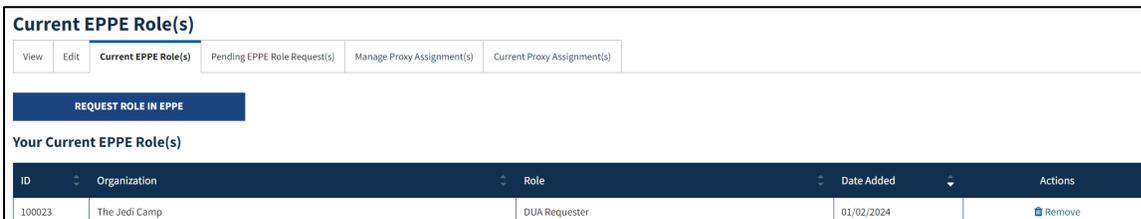Log into EPPE. The Welcome screen is displayed.

Figure 1: EPPE Menu

1. Select your **User ID** menu item ("USER'S PROFILE" in this example).

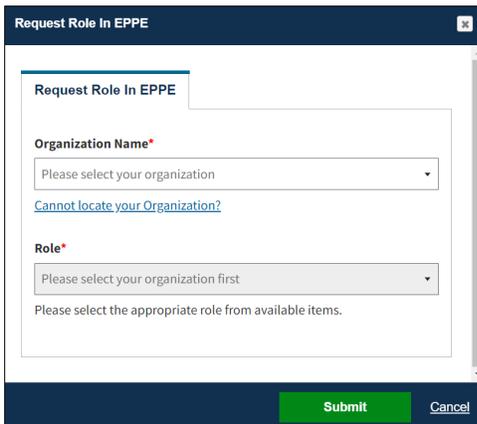The view **User Profile** screen is displayed.

Figure 2: EPPE Roles

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

The Request Additional Role screen is displayed.

Figure 3: Request an Additional Role

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

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

2.1   Select Organization

The **Organization Name** dropdown list is displayed based on the search criteria.

Figure 4: Submit Role Request

1. Select the **Organization.**
2. Select the **Role.**
3. Click **Submit**.

The Organization and any Roles are displayed in the table. You can add another role request to the table.

The Manage Access screen is displayed with the confirmation message, "*Your role request for [EPPE Role] with [Organization] has been submitted for review and approval..*"

Figure 5: Role Request Acknowledgement

Note: The EPPE Administration Team will review the request and determine if it should be approved.

Figure 6: Cannot Locate the Organization

4. If the organization does not exist in the EPPE System, click the ***Cannot locate the Organization?*** link.

The **Add New Organization** pop-up is displayed.

Figure 7: Add New Organization Pop-Up

5. Enter the Organization information:
    - Organization Name
    - Street Address
    - City
    - State/Province
    - ZIP

6. Click **Submit**.

The Confirmation message, "*[New Organization] 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

Note: A new Organization requires EPPE Administration Approval. Re-Start the Role request with the organization once the organization is approved.

CMS

3.   Acronyms

The following are acronyms used within the EPPE system.

Table 1: Acronyms

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

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