



Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

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

Version 2.0

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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: <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 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



1. Click your **USER ID** top menu item (shown as “USER’S PROFILE” in this example). The User Profile screen will be displayed.

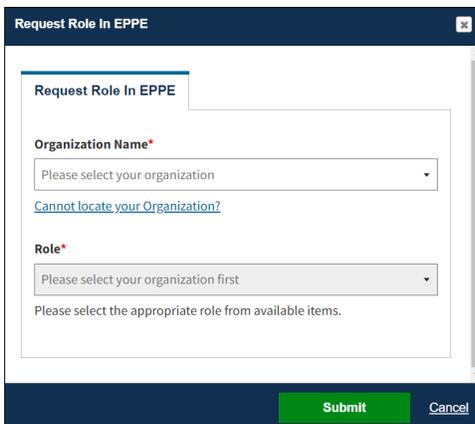
Figure 2: EPPE Roles



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



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

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

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

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

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

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

Acronym	Definition
CMS	Centers for Medicare and Medicaid Services
COR	CMS Contact (COR)
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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