

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).

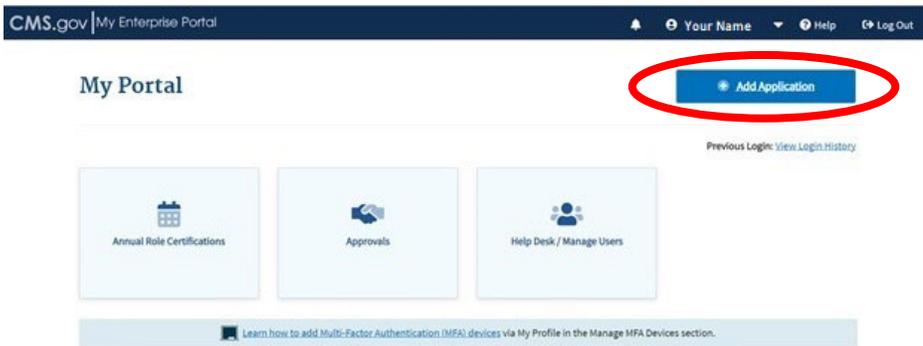
If you need assistance requesting the MAPD EPOC role, please review the following document link <https://www.cms.gov/files/document/epoc-role-request-guide.pdf>.

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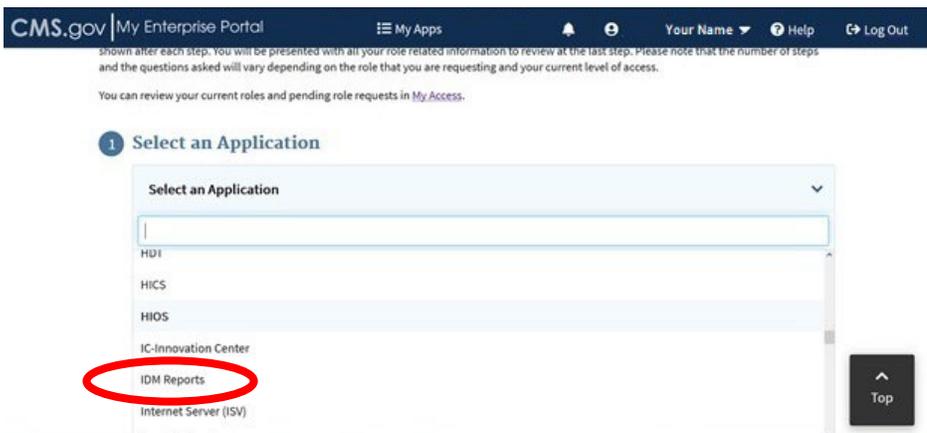
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EPOC Requesting MAPD Tailored EPOC Report Role

Step 1: The EPOC will log in to <https://portal.cms.gov/portal/> 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.



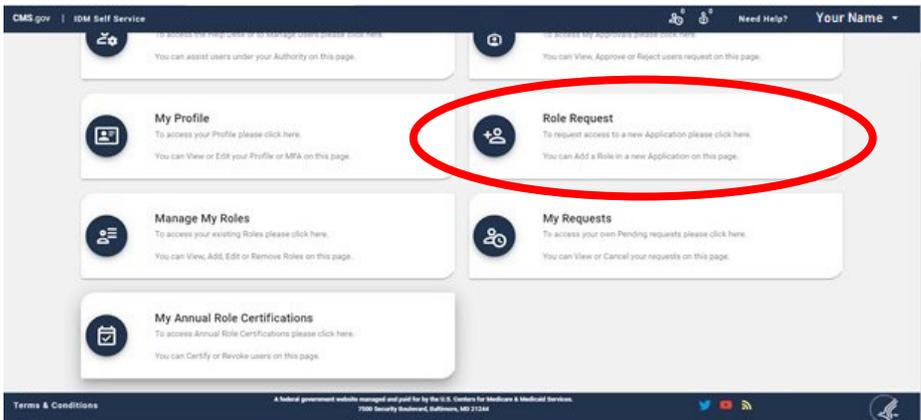
MAPD Tailored EPOC Report Role

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

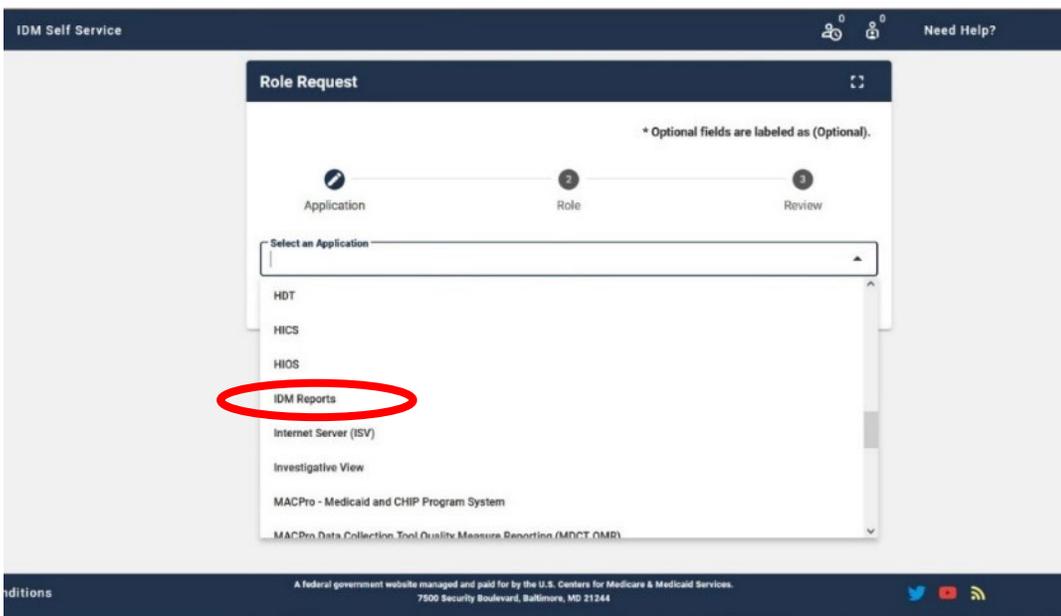


Note: You will be redirected to the IDM UI page (<https://home.idm.cms.gov/>).

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.

The screenshot shows the 'Role Request' form in the CMS.gov | IDM Self Service interface. The form is divided into four steps: Application, Group, Role, and Review. The 'Group' step is currently active. The 'Selected Application' is 'IDM Reports'. Below this, there is a 'View Helpdesk Details' button. The 'Select a Group' dropdown menu is open, showing three options: 'I am a CMS employee on the IDM team.', 'I am a Business Owner or designated Business Owner representative or Application Help Desk of an IDM supported application.', and '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.' The third option is circled in red.

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

The screenshot shows the 'Role Request' form with the 'Selected Group' updated to 'Application End User'. The 'View Helpdesk Details' button is now highlighted with a red circle. Below the 'Selected Group' section, there is a 'Select a Role' dropdown menu. At the bottom of the form, there are 'Cancel' and 'Back' buttons.

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

The screenshot shows the 'Role Request' form with the 'Select a Role' dropdown menu open. The 'Tailored Reports User' role is selected and highlighted with a red circle. Below the dropdown, there is an 'End User' section with the text '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.'

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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.

View Helpdesk Details

Selected Group
Application End User
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.

Selected Role
Tailored Reports User
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.

Select Application for Ad-Hoc report
MARx - Medicare Advantage & Prescription Drug System

Select Report
Please select Report

Available

- EPOC Reports

Selected

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

View Helpdesk Details

Selected Group
Application End User
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.

Selected Role
Tailored Reports User
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.

Select Application for Ad-Hoc report
MARx - Medicare Advantage & Prescription Drug System

Select Report
Please select Report

Available

- EPOC Reports

Selected

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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.

View Helpdesk Details

Selected Group
Application End User
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.

Selected Role
Tailored Reports User
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.

Select Application for Ad-Hoc report
MARx - Medicare Advantage & Prescription Drug System

Select Report
Please select Report

Available

Selected

- EPOC Reports

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

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View Helpdesk Details

Selected Group
Application End User
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.

Selected Role
Tailored Reports User
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.

Select Application for Ad-Hoc report
MARx - Medicare Advantage & Prescription Drug System

Select Report
Please select Report

Available

Selected
 EPOC Reports

Cancel Back **Review Request**

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

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Role Request

Application Group Role Attributes Review

Review

Application:	IDM Reports
Application Description:	The IDM Reports application provides access to various IDM reports with user data for your application.
Role:	Tailored Reports User
Role Description:	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.
Select Application for Ad-Hoc report:	MARx - Medicare Advantage & Prescription Drug System
Select Report:	EPOC Reports
Reason for Request:	<input type="text"/>

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[Cancel](#) [Back](#) [Submit Role Request](#)

Note: You should receive this confirmation page.

Role Request

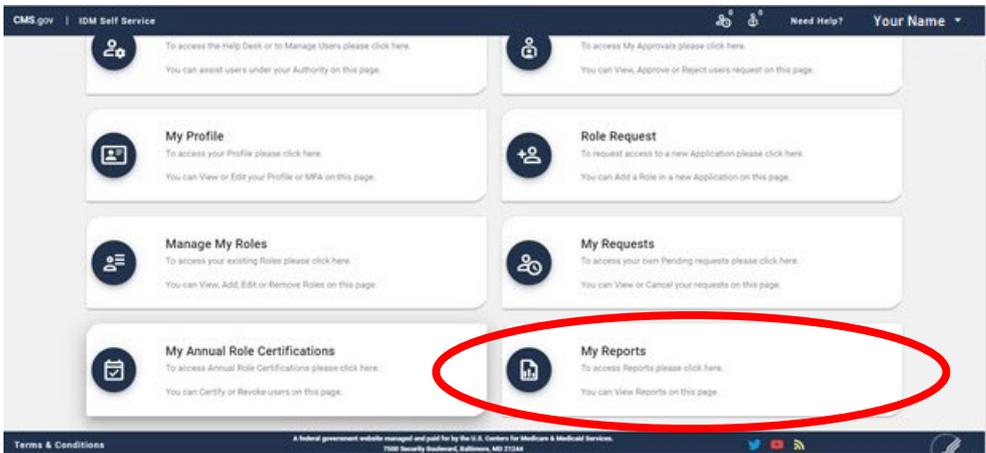
Your request for the **Tailored Reports User** role in the **IDM Reports** application was successfully submitted. The following Request ID has been generated.

Request ID	Attribute	Value
3368135	Select Application for Ad-Hoc report	MARx - Medicare Advantage & Prescription Drug System

[Back to Home](#)

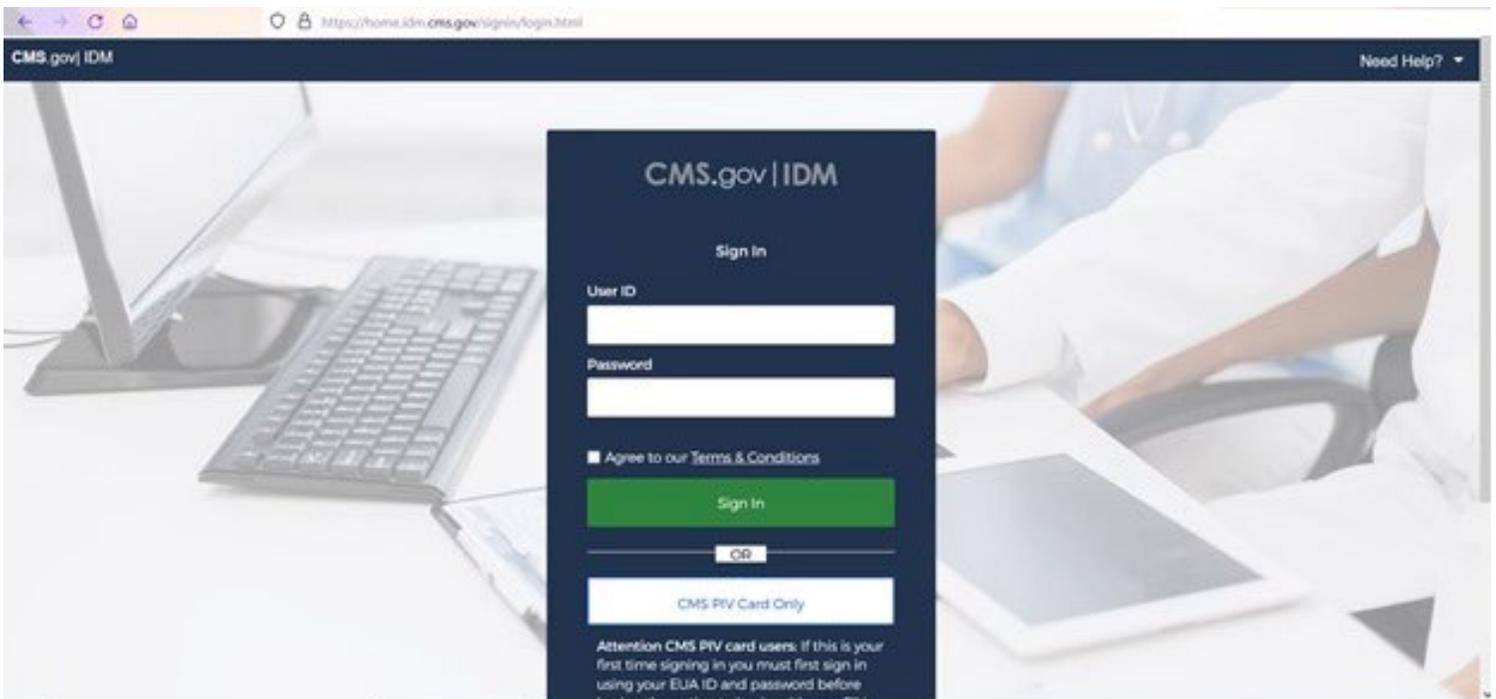
Step 11: Refresh the page to see the “My Reports” tile.

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Generating EPOC Report

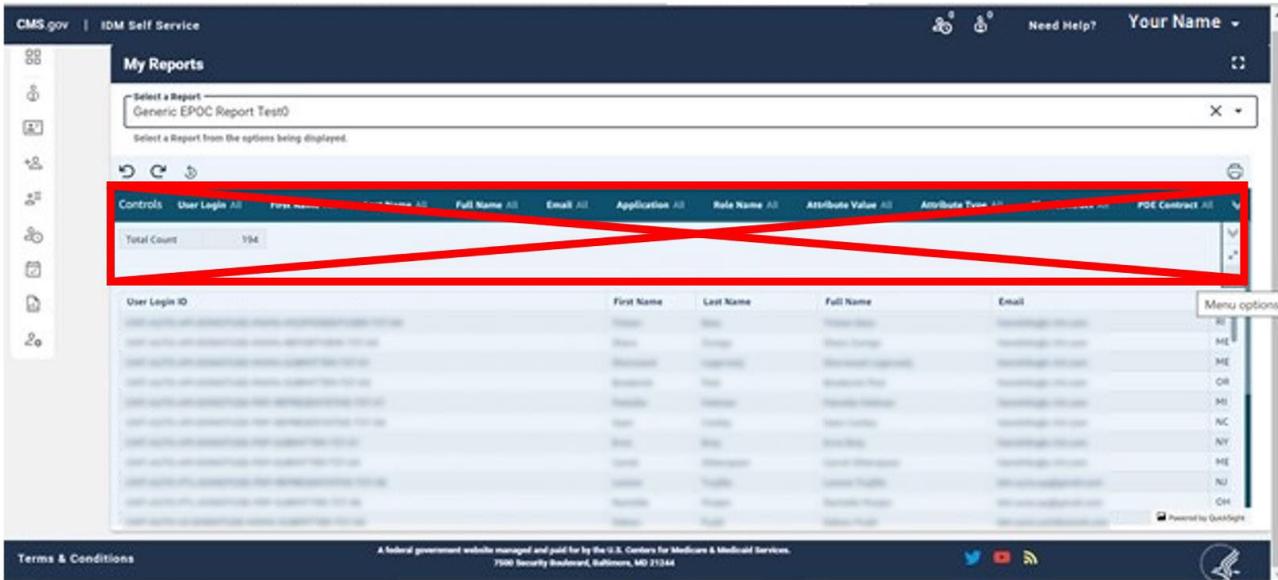
Step 1: Log into the IDM UI (<https://home.idm.cms.gov/>).



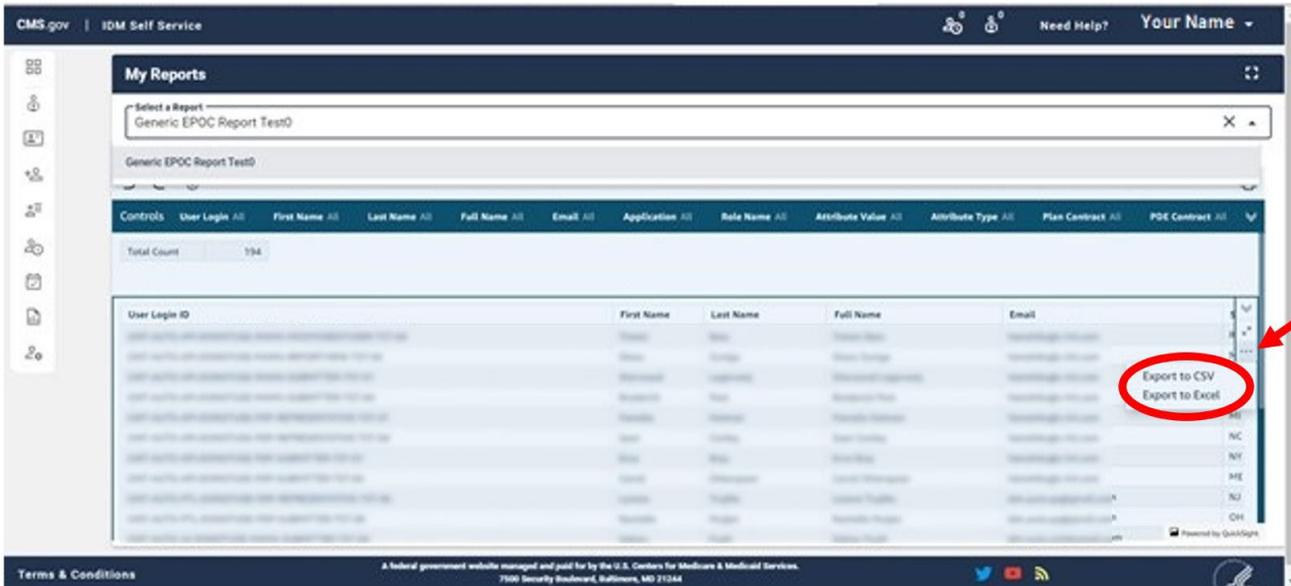
Step 2: Click on “My Reports”.

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



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



CSV report downloaded message.

Excel report downloaded message.

