

**Centers for Medicare & Medicaid Services** 

# **Enterprise Privacy Policy Engine Cloud (EPPE)**

## Contractor Approval Workflow Training Module -Requesting EPPE DUA Requester Role and Attestation

Version 2.0 01/22/2024

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### 1. Overview

This training guide will cover the following:

- How to initially request for a DUA Requester Role to be able to complete a Contractor (CONT) DUA.
- How to log into EPPE as a DUA Requester.

### 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: <u>https://www.cms.gov/files/document/eppeidm.pdf</u>
- Access CMS Portal: <u>https://portal.cms.gov/</u>

## 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. Obtaining the EPPE DUA Requester Role

Visit the CMS.gov Enterprise Portal website (<u>https://portal.cms.gov</u>) to request the DUA Requester role.

Figure 1: CMS.gov Website

CMS

	CMS.gov Enterprise Portal	
Us	er ID is a required field	
Pa	ssword is a required field	
~	I agree to the <u>Terms &amp; Conditions</u>	
	Login	
Forg Nee	got your <u>User ID</u> or your <u>Password</u> ? d to <u>unlock</u> your account?	
	New User Registration	

The CMS Portal Login screen is displayed.

- 1. Enter your Login Credentials.
- 2. Click Login.

The MFA page is displayed.

Figure 2: MFA Page



3. Select **Email** as the MFA option.

Note: Email is the default option and will always be available in the dropdown list.

The MFA page is displayed with additional fields.

#### Figure 3: MFA Page with Additional Fields

Login	Login with PIV Card
	CMS.gov Enterprise Portal
<b>v</b>	Multi-factor Authentication
E	mail 🗸
	Send MFA Code
E	nter MFA Code
	Verify
	Send MFA code automatically
30	Do not challenge me on this device for the next minutes
Lea	arn how to add MFA Devices beyond email
Un	able to Access MFA Device or MFA Code?
	<u>Cancel</u>

- 4. Click Send MFA Code.
- 5. Once the email is received, enter the MFA Code in the Enter MFA Code field.
- 6. Click Verify.

### 2.1 Request a Role in EPPE

The CMS Enterprise Portal Welcome Screen includes the EPPE Application tile.

Figure 4: CMS Enterprise Portal Welcome Screen



1. Click the **EPPE** application tile. A dropdown menu opens.

#### Figure 5: CMS Enterprise Portal: My Portal



2. Click Application to access the EPPE system.

The EPPE Welcome screen is displayed.

Figure 6: EPPE Role Request Welcome Screen

CMS.g	OV My Enterprise Portal		III My Apps		<u>Charlie Brown</u> ▼	@ <u>Help</u>	🕞 <u>Log Ou</u>
$\bigcirc$	EPPE Enterprise Privacy Policy Engine					CHAR	LIEBROWN
0	Welcome, Charlie Brown. This is your first login.						
<b>A</b>	Welcome to EPPE Note: Our records indicate that you are a first tim Select < Request Role in EPPE > if you wish to rec If you have questions, please contact the EPPE h	e user with EPPE or a user with no active role uest a role and organization assignment. elp desk at 844-EPPEDUA (844-377-3382) or E	in EPPE. You must be associated with one or more organizatio	ns and be associated with one or more	roles to use EPPE.		
Your	Request Role in EPPE Pending Role Request(s)						
ID	Crganization	Requested Role	Date Requested	÷	Actions		
		You do not have any pending rol	e requests. Use the Request Role in EPPE button above above to	request a role.			
Display	ving 0 - 0 of 0						

3. Click the **Request Role in EPPE** button to start the role selection process.

The Request Role in EPPE pop-up is displayed.

#### Figure 7: Request Role in EPPE Pop-Up

Request Role in EP	PE
Organization Name*	
Please select your or	ganization •
Role*	
Please select your or	ganization first •
Please select the appr	opriate role from available items.

- 4. Enter your **Organization Name** and select your **Organization** from the dropdown.
- 5. Select **DUA Requester** from the **Role** dropdown.
- 6. Click Submit.

The Attestation message "Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the EPPE web page," including a link to the EPPE page on CMS.gov.

#### Figure 8: Attestation Message

equest Role In EPPE			×		
Request Role In EPPE	Attestation				
Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the <u>EPPE web page</u> .					
I agree.					

- 7. Select the I agree checkbox.
- 8. Click Submit.

The Confirmation Message is displayed.

Figure 9: EPPE Role Request Acknowledgement

My Enterprise Portal	🔳 My Apps			🕒 <u>Charlie Brown</u> 🔻	Help	C Log O
EPPE Enterprise Privacy Policy Engine				USER GUIDES	CHAR	LIEBROWN
Your role request for DUA Requester with MARICOM SYSTEMS, INC. has been s	submitted for review and approval. (reference numb	er 20015)				
Welcome to EPPE						
Note: Our records indicate that you are a first-time user with EPPE or a user with no active role in EPPE. You must be associated with one or more organizations and be associated with one or more roles to use EPPE.						
Select < Request Role in EPPE > if you wish to request a role and organization	assignment.					
If you have questions, please contact the EPPE help desk at 844-EPPEDUA (84	4-377-3382) or EPPE@cms.hhs.gov.					
Request Role in EPPE						
Your Pending Role Request(s)						
ID	Requested Role	Date Requested		Actions		
20015 MARICOM SYSTEMS, INC.	DUA Requester	12/20/2023		B Remove		
Displaying 1 - 1 of 1						

9. Verify that the confirmation message accurately indicates the role requested.

**Note:** The EPPE role request submission acknowledgement displays the message: "Your organization/role request has been submitted for approval." The EPPE Administration (EPPE Admin) Team will review for approval.

### 2.2 Add a New Organization

In this example, we are adding a new organization.

1. From the Request a Role in the EPPE screen, click the *Cannot locate your Organization?* link to add an organization.

Figure 10: Request Role: Cannot locate your Organization

quest Role In EPPE		2
Request Role In EPPE		
Organization Name*		
Please select your organiza	tion	•
Cannot locate your Organiza	tion?	
Role*		
Please select your organiza	tion first	•
Please select the appropriate	e role from available items.	
	Submit	Cance

The Add New Organization pop-up is displayed.

The message, "*The new organization will be available for you to select only upon approval. Do you wish to continue with the request?*" appears at the top of the Add Organization screen as it expands. Entering information answers this question.

#### Figure 11: Add New Organization

Add New Organization		×
The new organization will be available for you to select only upon approval. Do you wish to continue with the request?		
Organization Name*		
Country United States		
Street address*		
City* State*	*	
- Oneq -	Submit	Cancel

- 2. Enter the **Organization** information:
  - Organization Name
  - Street Address
  - City
  - State
- 3. Click Submit.

**Note:** A new Organization requires EPPE Administrator approval and will not be immediately available.

Figure 12: Add Organization: Confirmation Message



After submission, a confirmation message will be displayed.

## 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) eppe@cms.hhs.gov