

Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Training Module-User Registration Process

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Table of Contents

1	Ove	rview	1
	1.1	EPPE Access Prerequisites	1
	1.2	Icons Used Infoughout the EPPE System	I
2	Abo	ut EPPE	2
	2.1	Identify Management (IDM) Introduction	2
	2.2	Multi-Factor Authentication (MFA) Overview	2
	2.3	IDM Registration Process	3
	2.4	EPPE Registration Process	7
	2.5	Experian Identity Verification	9
	2.6	Requesting Access to EPPE	. 11
	2.7	Requesting Access to EPPE Roles	. 13
3	Acro	onyms and Glossary	. 16
4	EPP	E Help Desk Information	. 17

List of Figures

Figure 1: IDM Registration URL Address	. 3
Figure 2: IDM Registration Login Page	. 3
Figure 3: IDM Registration Application Selection	. 4
Figure 4: IDM Registration Terms and Conditions	. 4
Figure 5: IDM Registration Your Information Page	5
Figure 6: IDM Registration User ID	5
Figure 7: IDM Registration Password	. 5
Figure 8: IDM Registration Security Question and Answer	. 6
Figure 9: IDM Registration Summary	. 6
Figure 10: IDM Registration Confirmation	7
Figure 11: Requesting Access Login Page	7
Figure 12: Requesting Access Multi-Factor Authentication	. 8
Figure 13: Requesting Access My Portal	. 8
Figure 14: Requesting Access Role Selection	. 8
Figure 15: Requesting Access Identity Verification	. 9
Figure 16: Identity Verification Step 1 1	10
Figure 17: Identity Verification Step 21	10

Training Module- User Registration Process: Version 2.0	iii	Enterprise F

Figure 18: Identity Verification Step 3	10
Figure 19: Identity Verification Step 4	11
Figure 20: Identity Verification Confirmation	11
Figure 21: Requesting Access Role Details	12
Figure 22: Requesting Access Reason for Request	12
Figure 23: Requesting Access Confirmation Request	13
Figure 24: Requesting Access Confirmation Message	13
Figure 25: Requesting Access My Access Page	13
Figure 26: Requesting an EPPE Role My Portal Page	13
Figure 27: Requesting an EPPE Role EPPE First Time User Page	14
Figure 28: Requesting an EPPE Role Request a Role in EPPE Pop-Out Window	14
Figure 29: EPPE Role Request Attestation	15
Figure 30: Requesting an EPPE Role Confirmation	15

List of Tables

Table 1: Acronyms	
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1 Overview

This Training Guide will cover the following:

- EPPE Overview
- IDM Overview
- Multi-Factor Authentication (MFA) Overview
- IDM Registration Process
- EPPE Registration Process
- Experian Identity Verification
- Requesting Access to EPPE
- Requesting Access to EPPE 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: <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.



2 About EPPE

The Enterprise Privacy Policy Engine (EPPE) system automates the process of submitting Data Use Agreement (DUA) requests and tracking their status through the approval and data receipt stages. End users, (requesters and all CMS approvers), can interactively use the system to manage their DUAs. For those requests that require supporting documentation, it allows documents to be uploaded and then later downloaded for review.

The EPPE Application processes the following 4 DUA Customer Types:

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

This training will guide you through the steps necessary to gain access to the EPPE system.

2.1 Identify Management (IDM) Introduction

The IDM system used by EPPE provides users with access to CMS applications. CMS established IDM to provide business partners with a means to create a single User ID that they can use to access one or more CMS applications.

To apply and receive an IDM User ID, complete the steps that follow.

2.2 Multi-Factor Authentication (MFA) Overview

Multi-Factor Authentication (MFA) is generally required to access CMS sensitive data. MFA uses a combination of two (or more) different token attributes (also known as factors), to authenticate the user. The EPPE Application requires two types of authentications.

- The first factor 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 factor 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).

Note: Some MFA options require the installation of an application on a smartphone.

The available MFA Options are listed below:

- **Email** This is the default option that is initially used to access IDM for the first time. Once the user logs in successfully, the user can specify any or all of the other MFA options through a profile update or continue to use email. Email is the only option that cannot be removed and will always remain on your profile.
- Short Message Service (SMS) The SMS option will send your MFA Code directly to your mobile device via a text message. This option requires you to provide a ten-digit U.S. phone number for a mobile device that is capable of receiving text messages. A carrier service charge may apply for this option.

- Interactive Voice Response (IVR) The IVR option will communicate your MFA Code through a voice message that will be sent directly to your phone. This option requires you to provide a valid 10-digit U.S. phone number and (optional) extension that will be used during login to obtain the MFA Code.
- **Google Authenticator** The Google Authenticator is an application for your smart phone that generates security codes. You will be asked for a security code whenever you need to verify your identity. Supported phones include iPhone, Android Phone, and Blackberry (a download to user's smartphone is required).
- Okta Verify The Okta Verify option produces push notifications which enable you to verify your identity with a single tap on your mobile device, without the need to type a code. Supported phones include iPhone, Android Phone, and Windows Phone (a download to user's smartphone is required).

2.3 IDM Registration Process

This step will guide you through creating your IDM profile, which will require both your personal and business-related information.

Figure 1: IDM Registration URL Address



1. Navigate to <u>https://portal.cms.gov</u>

The CMS Enterprise Portal is displayed.

Figure	2:	IDM	Registration	Login	Page
			gioti attori		



1. Click New User Registration.

The Select Your Application Page is displayed.

Figure 3: IDM Registration Application Selection

CMS.gov Enterprise Portal		Applications	? Help	3 About	🖂 Email Alerts
	Step #1: Select Your Application Step 1of 3-Select your application from the drondown. You will then need to agree to the terms & conditions.				
	Select Your Application		~		
	Elipibility and Enrollment Medicare Online (ELMO)		~		
	Eligibility Support Desktop (ESD)				
	Enterprise Cognos Reports Enterprise MicroStrategy Reports		1		
	EPPE FSD Remote Identity Proofing				
	Pedeek: Pedilah di Madel New (PPU) Perendi fa UN Talaka Leere		\sim		

1. Select **EPPE** from the drop-down menu.

The Terms and Conditions Page is displayed.

Figure 4: IDM Registration Terms and Conditions

CMS.gov Enterprise Portal		Applications	? Help	i About	🖂 Email Alerts
	Step #1: Select Your Application				
	Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.				
	EPPE	~			
	Terms & Conditions		~		
	OMB No 0938-1236 Expiration Date: 03/31/2021 Paperwork Reduction Act				
	Consent to Monitoring Pulsavia ante this whelte you cancent to be maniford. Upputherized attempts to unlead information and/or choose information as this well.	nite are strictly			
	by logging onto the website, you consent to be infinited. Unablicated alternity's to dpoad information and/or change information on this web probabled and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We enco the <u>HHS Rules of Behavior</u> .	urage you to read	~		
	I agree to the Terms & Conditions Next	Cancel			

2. Select I agree to the Terms and Conditions checkbox.

3. Click Next.

The Register Your Information Page is displayed.

Figure 5: IDM Registration Your Information Page

tep 2 of 3 - Please enter your personal	and contact information.			
ll fields are required unless marked	(optional).			
Enter First Name	Enter Middle Name (optional)	Enter Last Name		Suffix (optional)
Select Birth Month	Select Birth Date	Select Birth Year	~	
s Your Home Address U.S. B	ased?			
s Your Home Address U.S. B	ased?			
S Your Home Address U.S. E	ased?	Enter Home Address 2 (opt	ional)	
S Your Home Address U.S. E Yes O No Enter Home Address Line 1 Enter City	ased? Select State	Enter Home Address 2 (opt Enter ZIP Code	ional)	Enter ZIP+4 Code (optional)
S Your Home Address U.S. E Ves O No Enter Home Address Line 1 Enter City Enter Email Address	Select State V	Enter Home Address 2 (opt) Enter ZIP Code Confirm Email Address	ional)	Enter ZIP+4 Code (optional)

- 1. Complete all required information.
- 2. Click Next.

Note: Please provide your business email address. All other information provided should be your personal information.

The Create User ID, Password, & Security Question/Answer Page is displayed.

Figure 6: IDM Registration User ID

CMS.gov Enterprise Porta				Application
User ID Requirements Must be between 6 - 74 characters and contain at	Step #3: Create U	Ser ID, Passo		& Security Question/Answer
least one letter.	All fields are required unless marked	optional).	contraine pr	
Allowed special characters are limited to hyphens (-), underscores (_), apostrophes ('), and periods (.). The @ symbol is allowed only if the User ID is in a valid email address format (i doe@abc.edu or	Enter User ID			
123@abc.com). • Cannot contain 9 consecutive numbers.	Required field.			
Cannot begin or end with special characters. Cannot contain more than 1 consecutive special character.	Enter Password	Confirm Password	Ø	
	Security answer to be used in case you f	orget your password or you r	eed to unloc	k your account.
	Select Security Question		~	

1. Enter User ID.

Figure 7	: IDM	Registration	Password
----------	-------	--------------	----------

	All fields are required unless marked (optional).	
Password Requirements • Password must be changed every 60 days.	User ID John.Smith		
 Password must be changed every 60 days. Password must be a minimum of 15 characters. Password must contain: 1 upper case, 1 lower case letter and 1 number. The following special characters may not be used <> 0 '' / (space). Password cannot contain: Parts of User ID, First Name, Lark Marace Component Parts 	Enter Password	Confirm Password	8
Password can only be changed once every 24 hours. Password must be different from last 6 passwords.	Security answer to be used in case you for	orget your password or you n	eed to unlock your account.
	Select Security Question		~

- 2. Enter **Password.**
- 3. Re-enter and **Confirm Password.**

Figure 8: IDM Registration Security Question and Answer

	Enter Password	Ø	Confirm Password	Ø
	Security answer to be us	sed in case you fo	orget your password or y	ou need to unloc
	Security Question			
Security Answer Requirements	what is your favorite mo	ovie quote?		· ·
Can contain alphanumeric characters. Can contain spaces. Must be at least 4 characters. Cannot contain part of the security question.	Enter Security Answer			
Your Security Answer will be required in order to reset your password or unlock your account.	Required field.			
	Back	Ne	xt Cancel	

- 4. Select **Security Question** from the drop-down menu.
- 5. Enter Security Answer.
- 6. Click Next.

The New User Registration Summary page is displayed.

Figure 9: IDM Registration Summary

Prease review your inform	and a second sec		- Anna Andrea - A	1441		
	nation and mak	e any necessary	changes before subn	itting.		
EPPE						*
All fields are required u	inless marked	(optional).				
First Name				Last Name		
EPPE		Enter Middle	Name (optional)	User	Suffix (optional)	*
Dirth Month	Birth Date		Dirth Year			
January 🗸	1	~	1960			
Home Address Line 1				E-tU	ation 0	
nome Address One				Enter nome Address Line 2 (o	(puonal)	
City		State		ZIP Code		
City		Maryland		21075	Enter ZIP+4 (optional)	
Email Address eppeuser1@eppe.com Phone Number			Confi	rm Email Address ser1@eppe.com		
Email Address eppeuser1@eppe.com Phone Number			Confi	rm Email Address ser 1,@eppe.com		
Email Address eppeuser1@eppe.com Phone Number 410-410-4100			confi	rm Email Address ser1@eppe.com		
Enail Address eppeuser1@eppe.com Phone Number 410-410-4100			confi	em Email Address ser 1@eppe.com		
Email Address eppeuser1@eppe.com Phone Number 410-410-4100			Confi	en Enal Address Ser 1 Beppe.com		
Email Address eppeuser1@eppe.com Phone Number 410-410-4100	unless marked	(optional).	Confi	en Enal Address Ser 1 Beppe.com		
Email Address eppeuser1@eppe.com Phone Number 410-410-4100 All fields are required to User ID	Inless marked	(optional).	eppes	en Enal Address Serl Beppe.com		
Email Address eppenser1@eppe.com Phone Number 410-410-4100 All fields are required to User ID eppeuser1	inless marked	(optional).	сояб	nn Ensal Address		
Enail Address eppeuser1@eppe.com Phone Number 410-410-4100 All fields are required to User 80 eppeuser1.	inless marked	(optional).	eppex	nn Enad Address		
Enail Address oppeuser1@exper.com Phone Number 410-410-4100 All fields are required to User ID expenser1 Password	inless marked	(optional).	epper sword	ne fund Address		
Enal Address operated (Reppercom Phone Number 410-410-4100 All fields are required to User ID copesated Passeod Passeod	inless marked	(optional).	epper epper	ne fund Address		
Enal Adress expenser1@exper.com Phone Number 410-410-4100 All fields are required to User80 expenser1 Passeed 	inless marked	(optional).	epper sword S	ne fund Address		
Email Advess experison 1 (Reppercom Ploate Number 414-110-1100 All fields are required to User 80 expenses1 Planewood Select Your Security Que What music album or so	inless marked	(optional).	epper exercit	ne fund Address		
Enal Adress expension Lifesper.com Phone Humber 410-410-4100 All fields are required to Uner ID expension Personed Select Your Security Qian Withat Imasic album or so Society Answer	anless marked	(optional).	cont appen second S	ne fund Address		

1. Review the entered information and then click **Submit User.**

A User Registration confirmation message is displayed.

Figure 10: IDM Registration Confirmation

CMS,gov Enterprise Portal	olications	🕑 Help	About	🖂 Email Alerts
✓ Confirmation	×			
Your User ID has been successfully registered with CMS Enterprise Portal. An email has been sent to your registered email address.				
You can now login.				
		- T		

1. The Confirmation Message states 'Your User ID has been successfully registered with CMS Enterprise Portal. An email has been sent to your registered email address. You can now login.'

The IDM Registration Process is now complete. You will receive an email notifying you of the successful creation of your account.

2.4 EPPE Registration Process

EPPE is accessible through the CMS Enterprise Portal by using a valid Identity Management (IDM) User ID.

Note: Users must use an IDM User ID, not an Enterprise User Administration (EUA) User ID, to access the EPPE application.

Figure 11: Requesting Access Login Page



- 2. Enter User ID and Password.
- 3. Click the Agree to our Terms & Conditions checkbox.
- 4. Click Login.

Multi-Factor Authentication is displayed.

Figure 12: Requesting Access Multi-Factor Authentication

Login	Login with PIV Card					
	CMS.gov Enterprise Portal					
\$	Multi-factor Authe	ntication				
E	mail	~				
Sen	nd To: kl@scopeinfotechinc.co	<i></i>				
	Send MFA (Code				
E	nter MFA Code					
	Verify					
	Send MFA code automati	cally				
30	Do not challenge me on t minutes	his device for the next				
<u>Lea</u> Uni	arn how to add MFA Device able to Access MFA Device	<u>s beyond email</u> o <u>r MFA Code?</u>				
		Cancel				

- 1. Enter Multi-Factor Authentication Code.
- 2. Click Verify.

Figure 13: Requesting Access My Portal

CMS.gov My Enterpris	e Portal	٠	😫 EPPE User 👻	🕜 Help	€→ Log Out
	My Portal	Add Application			
	Welcome to CMS Enterprise Portal Welcome EPFE User to CMS Enterprise Portal. You've selected EPFE application during your registration. You can request here, You may request access to other applications by selecting "Add Application" button.	access to this application by clicking			

1. Click on "here" to request access to the EPPE application.

The Request Application Access Page is displayed.

Figure 14: Requesting Access Role Selection

CMS.gov My Enterprise	Portal 🗄 My Apps	<u></u>	😫 EPPE User 🔻	Help	€→ Log Out
Re	quest Application Access				
0	Select an Application				
	✓ EPPE				
		 Comp Comp 	pleted Edit		
2	Select a Role				
	Except at 2020 EXPER Buildings Convert Representative EXPER Administrator EXPERIMENT AND ADMINISTRATION EXPERIMENT ADMINISTRATION ADMINISTRATION EXPERTING EXPERIMENT E				
3	Enter Reason for Request				
		c	Cancel		

- 2. The **Select an Application** field is populated by default.
- 3. Click the **Select a Role** field and choose **EPPE User** from the drop-down menu.
- 4. Click Next.

CMS.gov My Enterprise P	iortal 🗄 My Apps 🐥	😫 EPPE User 🔻	Help	€→ Log Out
Req	uest Application Access			
1 Se	elect an Application			
~	EPPE			
	√ ca	Edit		
2 Se	elect a Role			
~	EPPE User			
	✓ cc	mpleted Edit		
3 Cd	omplete Identity Verification			
	Identity Verification This role requires an additional level of verification. You will be asked to provide additional information to verify your identity. Please select "Launch" to begin the ident verification process. You will return to the next step below when identity verification is complete.	ty		
	ta	inch		
(4) E1	nter Role Details			
(5) E1	nter Reason for Request			
		Cancel		

Figure 15: Requesting Access Identity Verification

5. Click Launch to start the Identity Verification process.

2.5 Experian Identity Verification

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 Experian identity verification is a required step to access the EPPE system and must be completed.

Users may have already encountered Remote Identity Proofing (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 into 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 application. RIDP will not impact the user's credit. Users will be asked to provide a set of core credentials which include:

- 1. Full Legal Name
- 2. Social Security Number
- 3. Date of Birth
- 4. Current Residential Address
- 5. Personal Phone Number

Figure 16: Identity Verification Step 1

CMS.gov My Enterprise Portal	i≣ My Apps		😫 EPPE User 👻	Help	€→ Log Ou
Step #1: Identi	ty Verification Overview				
To protect your privacy, you will no	ed to complete Identity Verification successfully, before requesting access to the selected role. Below are a few	v items to keep in mind.			
Ensure that you have entered to verify your identify with E 2. Identify Weification involves your Experian credit report. 3. You may need to have access additional information, plea	i your legal name, current home address, phone number, date of birth and email address correctly. We will only perian, an external Identity Verification provider. Experian using information from your credit report to help confirm your identity. As a result, you may see an en iof inquiries do not affect your credit score and you do not incur any charges related to them. to your personal and credit report information, as the Sperian application will pose questions to you, based or see see the Experian Consumer Assistance website - <u>http://www.experian.com/help/</u>	y collect personal inform ntry called a "soft inquiry on data in their files. For	nation y" on		
If you elect to proceed now, you w identity. To continue this process,	II be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information select 'Next'.	on (PII) is used to confirm	n your		
	Next Cancel				

1. Click Next.

Figure 17: Identity Verification Step 2

CMS.gov My Enterprise	lortol I≣ My Apps	٠	😫 EPPE User 👻	Help	€→ Log Out
	Step #2: Accept Terms & Conditions				
	OMB No. 0938-1236 Expiration Date: 04/30/2017 (OMB Re-Certification Pending) Paperwork Reduction Act		~		
	Protecting Your Privacy				
	Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the <u>O</u> <u>Privacy Act Statement</u> , which describes how we use the information you provide.	MS			
	Personal information is described as data that is using to an individual, such as name, address, histophore number, Social Social Social Northy Number and Gato O Intri (DOB), CMS is write aven of the privacy concerns around PII data. In fact, we share your concerns. We will only colled presonal information to verify your identify "Dori information will be disclosed to Experiment, an existinal autoritations service provider, to help us writely your identify. If Collecting, we will validate your Social Social Number with Experime only for the purposes of verifying your identify. Experimit writings the information you give us against their records. We may also us your answers to the utalineng expections and other PI to later (Helf you on Later your got error majore yourd).	ity. Ise			
	HHS Rules of Behavior				
	We encourage you to read the HHS Rules of Behavior, which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.				
	- I have read the HHS Duloe of Rohavior for Drivileand Licer Accounte (addendum to the HHS Duloe of Rohavior (HHS DoR), document number HHS CO10 2012		~		
	agree to the Terms & Canditions Black Noxt	Cancel			

- 1. Click the I agree to the Terms & Conditions checkbox.
- 2. Click Next.

Figure 18: Identity Verification Step 3

CMS.gov My Enterprise Portal	i≣ N	ly Apps	≜ ⊖	EPPE User 👻 😯 Help	€→ Log Out
Step #3: Enter You Enter your legal first name and last name All fields are required unless marked First Name	r Information as it may be required for Identity Verificati optional'. Hiddle Name (optional)	on. Last Name User	Suffix (optional) V		
Social Security Number	Birth Month January V	Birth Date Birth Year 1 ¥ 1960	~		
Is Your Address US Based?		Enter Home Address Line 2 (optional)			
City City	State Maryland ¥	ZIP Code 21075	Enter ZIP+4 Code (optional)		
Phone Number 410-410-4100					
Email Address eppeuser1@eppe.com	Confirm	imail Address 1@eppe.com			
Check here if you have read and verified	the information above is accurate and comp	lete as required by Identity Verification. Cancel			

- 1. Click the Check here if you have read and verified the information above is accurate and complete as required by Identity Verification checkbox.
- 2. Click Next.

Figure 19: Identity Verification Step 4

CMS.gov My Enterprise F	ortal i My Apps	🐥 🤁 EPPE User 👻 🕼 Help 🖙 Log Out
Ste	p #4: Verify Your Identity	
1. You credit	r credit file indicates you may have an auto loan/lease, opened in or around May 2006. Who is the provider for this account?	
00000	ACCION USA CHABE LEBUELC BANK WINTRUST FINANCIAL KONE OF THE ABOVE	
z. wh	at is the total monthly payment for the above-referenced account?	
00000	175 - \$224 1225 - \$274 1225 - \$374 1325 - \$374	
3. You credit	r credit file indicates you may have a student loan, opened in or around November 2002. Who is the provider for this account?	
00000	lierty fikance Mitsubishi accept. Corp Allie Mae WFB THANKCIAL MORE OF THE ABOVE	
4. Wh	it is the total monthly payment for the above-referenced account?	
00000	150 - \$74 175 - \$99 100 - \$124 125 - \$149 KORE OF THE ABOVE	
	Back Next Cancel	

1. Provide an answer to each question and then click Next.

Figure 20: Identity Verification Confirmation

CMS.gov My Enterprise Portal	i≣ My Apps	0	John Doe 🔫	Help	€ Log Out
Step #4: Verify Your Ide	entity				
Confirmation You have successfully completed the Remote	e Identity Proofing process.			×	
			Next		

- 2. The confirmation message, **"You have successfully completed the Remote Identity Proofing process"** displays.
- 3. Click Next.

2.6 Requesting Access to EPPE

Requesting Access to EPPE is accessible when the Identification Verification is complete.

Figure 21: Requesting Access Role Details

CMS.gov My Enterprise	ə Portal	i≣ My Apps	≜ ⊖ ∈	EPPE User 🔻 😯	Help	€→ Log Out
Re	quest Application Acco	255				
0	Select an Application					
	✓ EPPE					
			✓ Completed ☑ Edit			
0	Select a Role					
	 EPPE User 					
			✓ Completed	1		
3	Complete Identity Verification					
	 Identity Verification 					
			 Completed 			
4	Enter Role Details					
	All fields are required unless marked 'optional'.					
	Enter EPPE Organization Name					
			Next			
5	Enter Reason for Request					
			Cancel			

- 1. Enter the Organization Name.
- 2. Click Next.

Figure 22: Requesting Access Reason for Request

CMS.GOV My Enterp	orise Porta	:= My Apps	÷ •	EPPE User 👻 👔	Help	Le Log Ou
1	Request Application Access					
	Select an Application					
	✓ EPPE		at Consider			
				dit		
	2 Select a Role					
	✓ EPPE User					
			 Complete 	ed		
-			C Ec	dit		
•	3 Complete Identity Verification					
	 Identity Verification 					
			 Complete 	ed		
	4 Enter Role Details					
	All fields are required unless marked 'optional'.					
	CMS					
			✓ Complete	ed		
	5 Enter Reason for Request					
	Enter a Reason for Request					
			Submit			
=						

- 1. Enter the Reason for Request.
- 2. Click Submit.

Figure 23: Requesting Access Confirmation Request



1. Click **OK** to proceed.

Figure 24: Requesting Access Confirmation Message

CMS.gov My Enterprise I	Portal i≣ My Apps	٠	😫 EPPE User 🔻	Help	€ Log Out
	Confirmation Your IDM request has been successfully submitted.	×			
	Request Application Access				
	Request New Application Access Acknowledgement				
	Your IDM request has been successfully submitted.				
	The tracking number for your request for EPPE User role in EPPE application is: 4605393				
	Please use this number in all correspondence concerning this request.				
	You will receive an email once your request has been processed.				
	Ok				

2. Click **OK** to return to the Enterprise Poral page.

2.7 Requesting Access to EPPE Roles

Figure 25: Requesting Access My Access Page

CMS.gov My Enterprise Portal			i≣ My Apps ♠			Help		
My Access ≆≣ My Roles	My Access [™] My Pending Requests							
The following is	a list of pending requests submitted for approval.							
			Q Global Filter					
Request ID 🕈	Application 🗢	Role Name 🗢	Attributes 🕈	Submission Date 🗢	Expiration Date 🗢	Action		
4605393	EPPE	EPPE User	EPPE Organization Name: CMS	Feb 5, 2020	Feb 6, 2020	Cancel		
Showing 1 of 1 reco	rd.	1	K 4 1 + H 10 -	A				

At this point the Application Access Request is complete. The request must be approved. An email will be sent once the pending request is approved. After access is granted, log into the Enterprise Portal.

Figure 26: Requesting an EPPE Role My Portal Page

CMS.gov My Enterpr	rise Portal	٠	😫 EPPE User 👻	🕑 Help	€→ Log Out
	My Portal	O Add Application			
	Ерре				
	EPPE Application				

- 1. Click on the **EPPE** tile.
- 2. Then click on the **Application** link.

Figure 27: Requesting an EPPE Role EPPE First Time User Page

EPPE Enterprise Privacy Policy Engine				USER GUIDES CHARLIEBROWN
Welcome, Charlie Brown. This is your first login.				
Welcome to EPPE Note: Our records indicate that you are a first-time user with Select < Request Role in EPPE Hyou wish to request a role If you have questions, please contact the EPPE help desk and	h EPPE or a user with no active re and organization assignment. 844-EPPEDUA (844-377-3382) or	ole in EPPE. You must be associated with one or more organizations and r EPPE@cms.hhs.gov.	l be associated with one or m	ore roles to use EPPE.
Request Role in EPPE Your Pending Role Request(s)				
ID Organization	Requested Role	Date Requested		Actions
	You do not have any pending r	role requests. Use the Request Role in EPPE button above above to requ	est a role.	
Displaying 0 - 0 of 0				

1. Click on the **Request a Role in EPPE** hyperlink or button.

The Request a Role in EPPE pop-out window is displayed.

Figure 28: Requesting an EPPE Role Request a Role in EPPE Pop-Out Window

quest Role In EPPE		E
Request Role In EPPE		
Organization Name*		
Please select your organization	n	•
Role*	_	
Please select your organization	n first	•
Please select the appropriate ro	le from available items.	
	Submit	Cance

- 2. Select an **Organization** from the drop-down menu.
- 3. Select a **Role** from the drop-down menu.
- 4. Click Submit.

Figure 29: EPPE Role Request Attestation.

Request Role In EPPE			×
Request Role In EPPE	Attestation		
Agreeing to this stateme for the role that I am req	nt confirms that I have co uesting, as specified on th	mpleted the mandatory tr e <u>EPPE web page</u> .	aining
I agree.*	ગ્		
	Previous	Submit	<u>Cancel</u>

2. Click the **I agree** checkbox.

Figure 30: Requesting an EPPE Role Confirmation.

CMS.	gov My Er	iterprise Portal	🗮 My Apps		٠	🕒 <u>Charlie Brown</u> 🔻	O Help	🕩 Log Out
	EPPE Enterprise P	rivacy Policy Engine				USER GUIDES	CHARLII	EBROWN
	Your role ret	uest for DUA Requester with MARICOM SYSTEMS, INC , has be	en submitted for review and approval. (reference num	ber 20015)				
	Welcome to	EPPE						
	Note: Our re Select < Rec	cords indicate that you are a first-time user with EPPE or a us uest Role in EPPE > if you wish to request a role and organiza	er with no active role in EPPE. You must be associated i ion assignment.	vith one or more organizations and be associated with	i one or more ro	oles to use EPPE.		
	If you have o	uestions, please contact the EPPE help desk at 844-EPPEDU/	(844-377-3382) or EPPE@cms.hhs.gov.					
	Reques	t Role in EPPE						
Your	Pending R	ole Request(s)						
ID	٢	Organization	Requested Role	Date Requested		Actions		
2001	5	MARICOM SYSTEMS, INC.	DUA Requester	12/20/2023		🛱 Remove		
Displa	rying 1 - 1 of 1							

- 1. The EPPE role request submission acknowledgement displays the message, "Your organization/role request has been submitted for approval."
- 2. The EPPE Administrator will review for approval.

3 Acronyms and Glossary

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