



# 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).

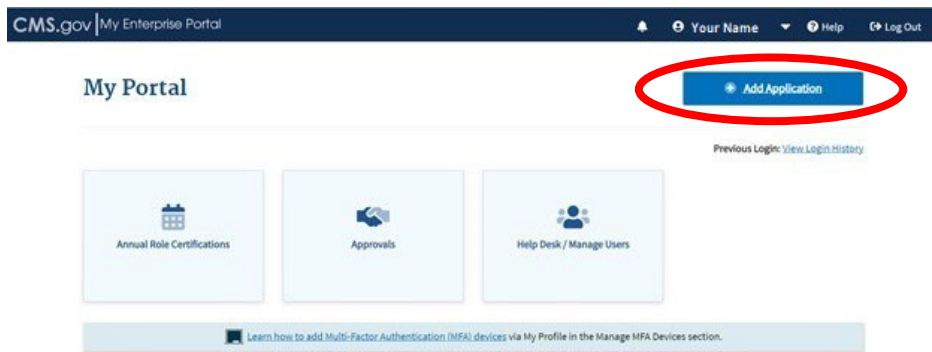
If you need assistance requesting the MAPD EPOC role, please review the following document link <https://www.cms.gov/files/document/epoc-role-request-guide.pdf>.

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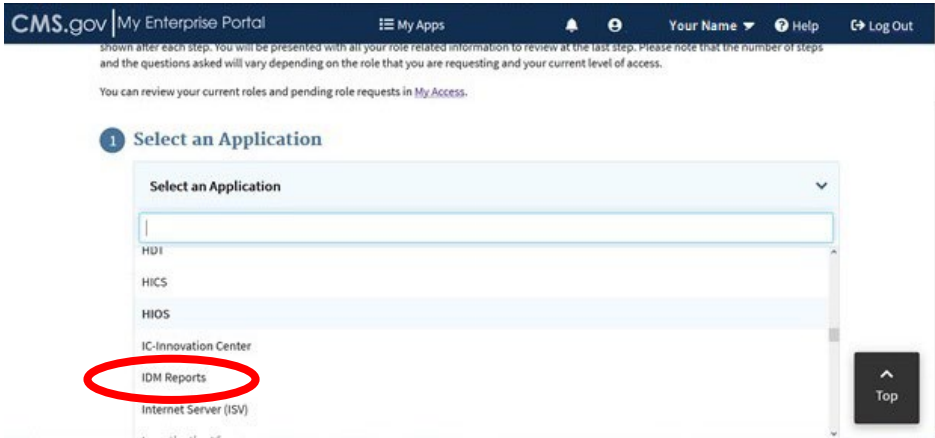
## EPOC requesting MAPD Tailored EPOC Report role

**Step 1:** The EPOC will log in to <https://portal.cms.gov/portal/> and select the “Add Application” button.

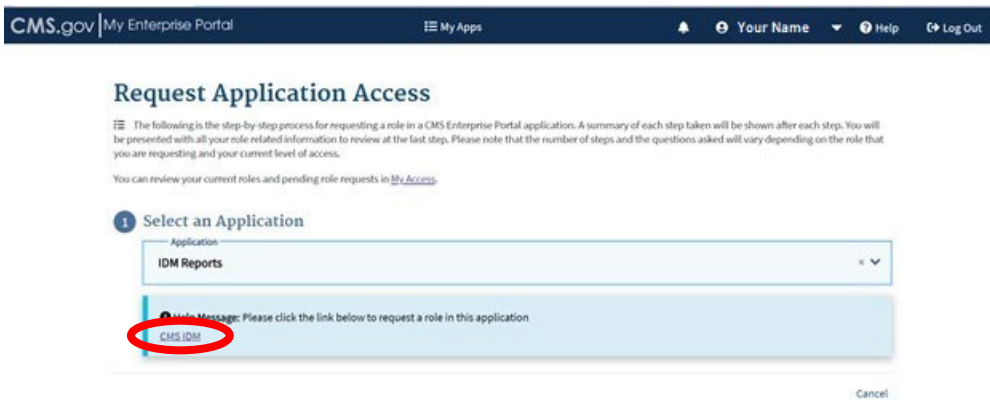


**Step 2:** Select the “Identity Management (IDM) Reports” application from the “Select an Application” drop-down list on the “Request Application Access” page.

# MAPD Tailored EPOC Report Role

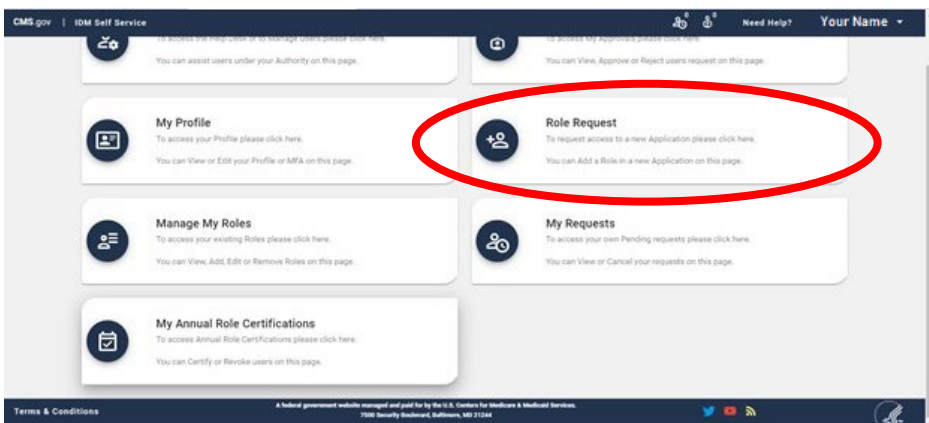


**Step 3:** Select the “CMS IDM” link on the “Request Application Access” page.



**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.

# MAPD Tailored EPOC Report Role

Role Request

\* Optional fields are labeled as (Optional).

Application Role Review

Select an Application

- HDT
- HICS
- HIOS
- IDM Reports**
- Internet Server (ISV)
- Investigative View
- MACPro - Medicaid and CHIP Program System
- MACPro Data Collection Tool Quality Measure Reporting (MDCT QMR)

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7500 Security Boulevard, Baltimore, MD 21244

**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.

Role Request

\* Optional fields are labeled as (Optional).

Application Group Role Review

Selected Application  
IDM Reports  
The IDM Reports application provides access to various IDM reports with user data for your application.

View Helpdesk Details

Select a Group

- 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.
- 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.**

Terms & Conditions

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

# MAPD Tailored EPOC Report Role

CMS.gov | IDM Self Service

Need Help? Your Name

### Role Request

\* Optional fields are labeled as (Optional).

Application Group Role Review

Selected Application  
IDM Reports  
The IDM Reports application provides access to various IDM reports with user data for your application.

[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.

Select a Role

Select the Role you want to request.

[Cancel](#) [Back](#)

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

CMS.gov | IDM Self Service

Need Help? Your Name

### Role Request

\* Optional fields are labeled as (Optional).

Application Group Role Review

Selected Application  
IDM Reports  
The IDM Reports application provides access to various IDM reports with user data for your application.

[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.

Select a Role

End User

Tailored Reports User

[Cancel](#) [Back](#)

**7:** Select the “MARx – Medicare Advantage & Prescription Drug System” application from the “Select Application for Ad-Hoc Report” drop-down list.

# MAPD Tailored EPOC Report Role

**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

**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.

# MAPD Tailored EPOC Report Role

**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.

**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.

# MAPD Tailored EPOC Report Role

## 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"/>

0 / 600

Cancel Back Submit Role Request

**Note:** You should receive this confirmation page.

## Role Request

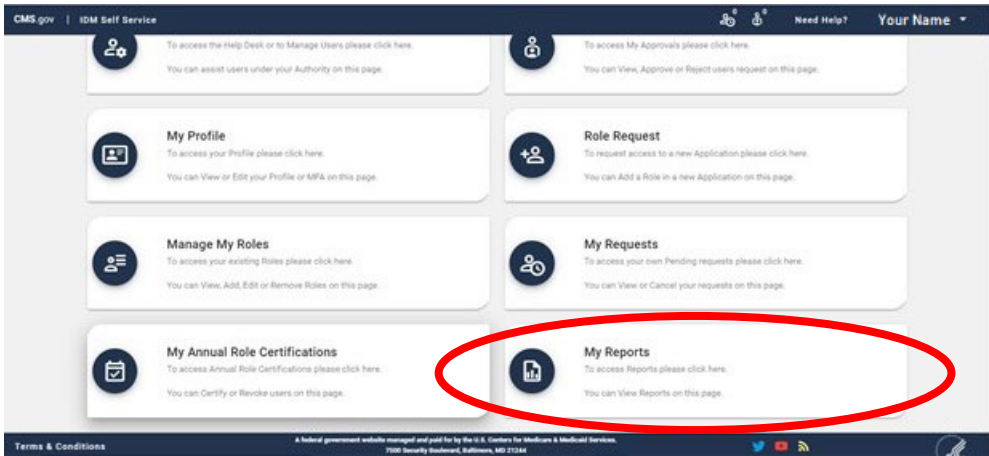
Your request for the **Tailored Reports User** role in the **IDM Reports** application was successfully submitted. The following Request ID has been generated.

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

Back to Home

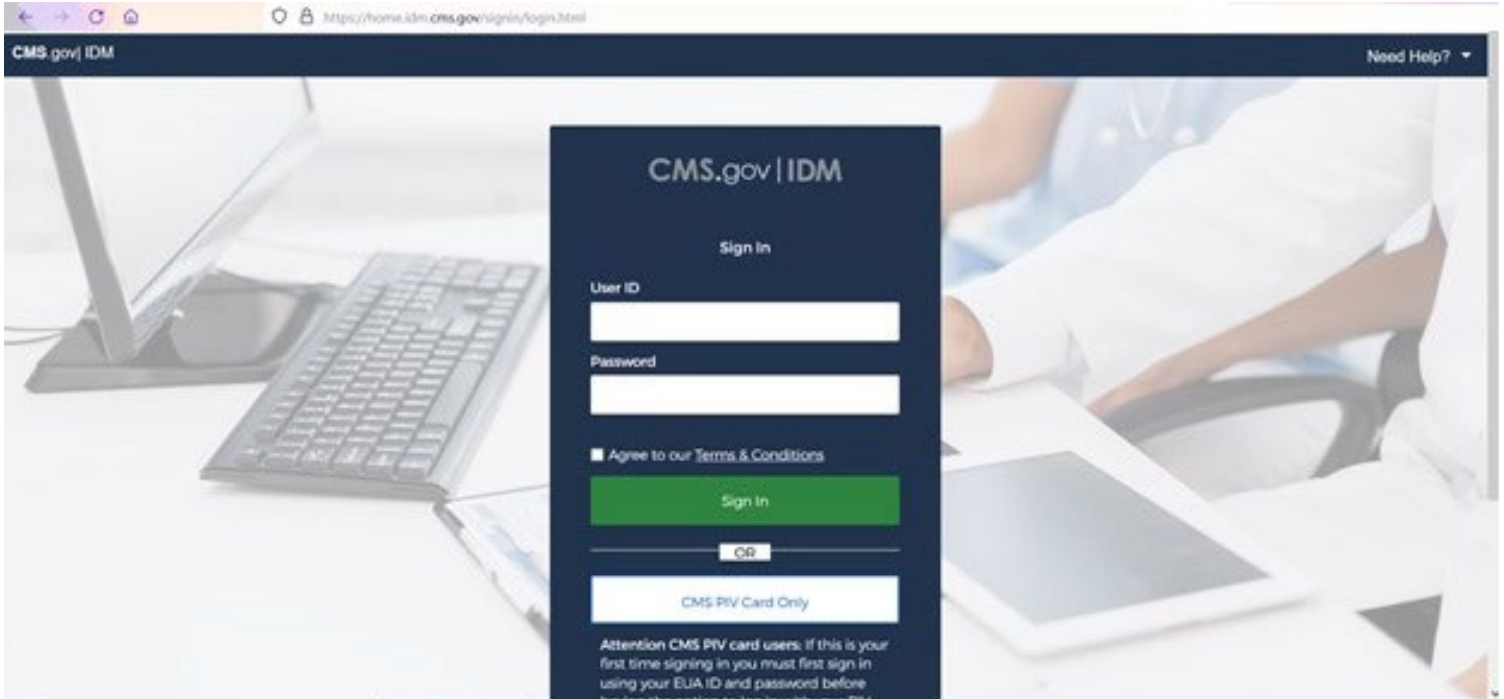
# MAPD Tailored EPOC Report Role

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



## Generating EPOC Report

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

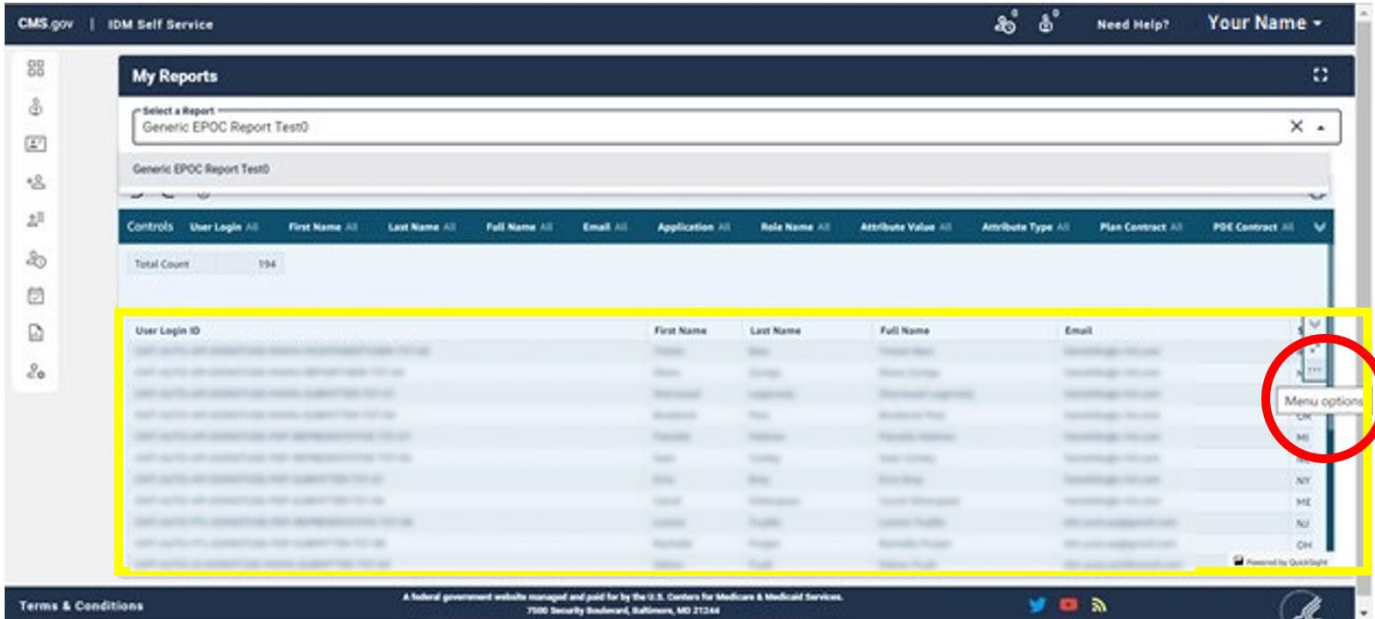




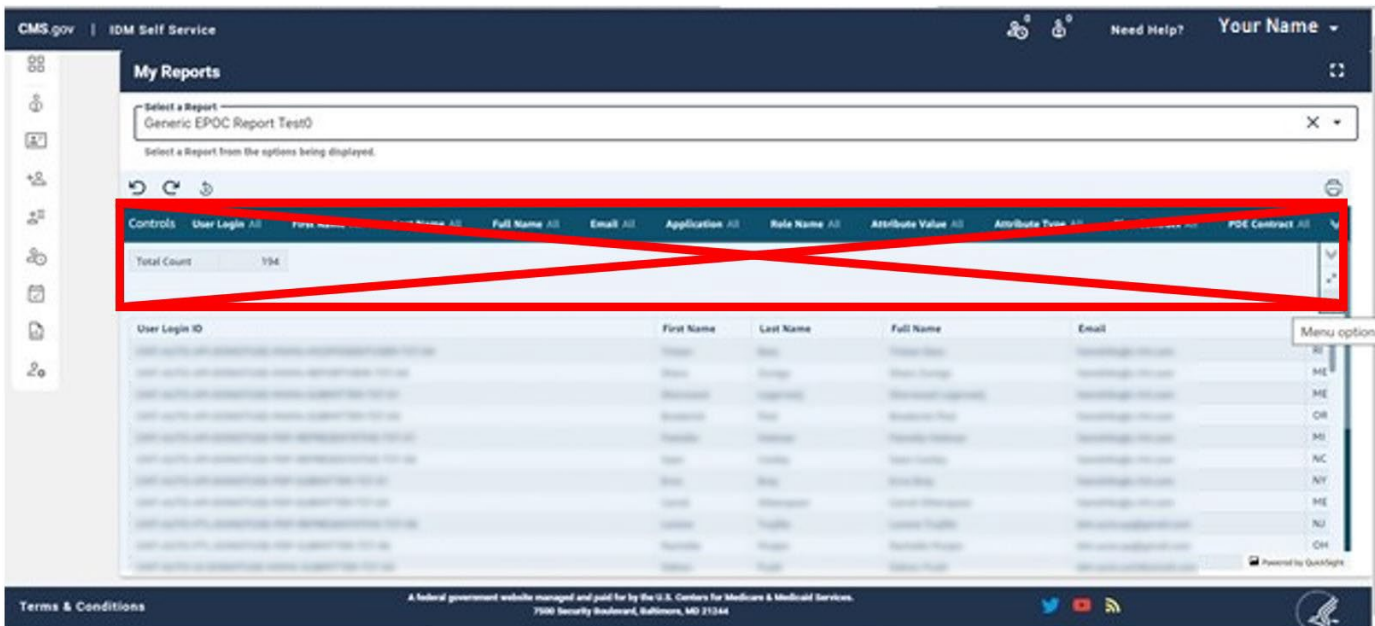


# MAPD Tailored EPOC Report Role

**Step 5:** To export the report, please click anywhere on the result data (indicated by the yellow box) and the menu bar will be visible (indicated within the red circle).

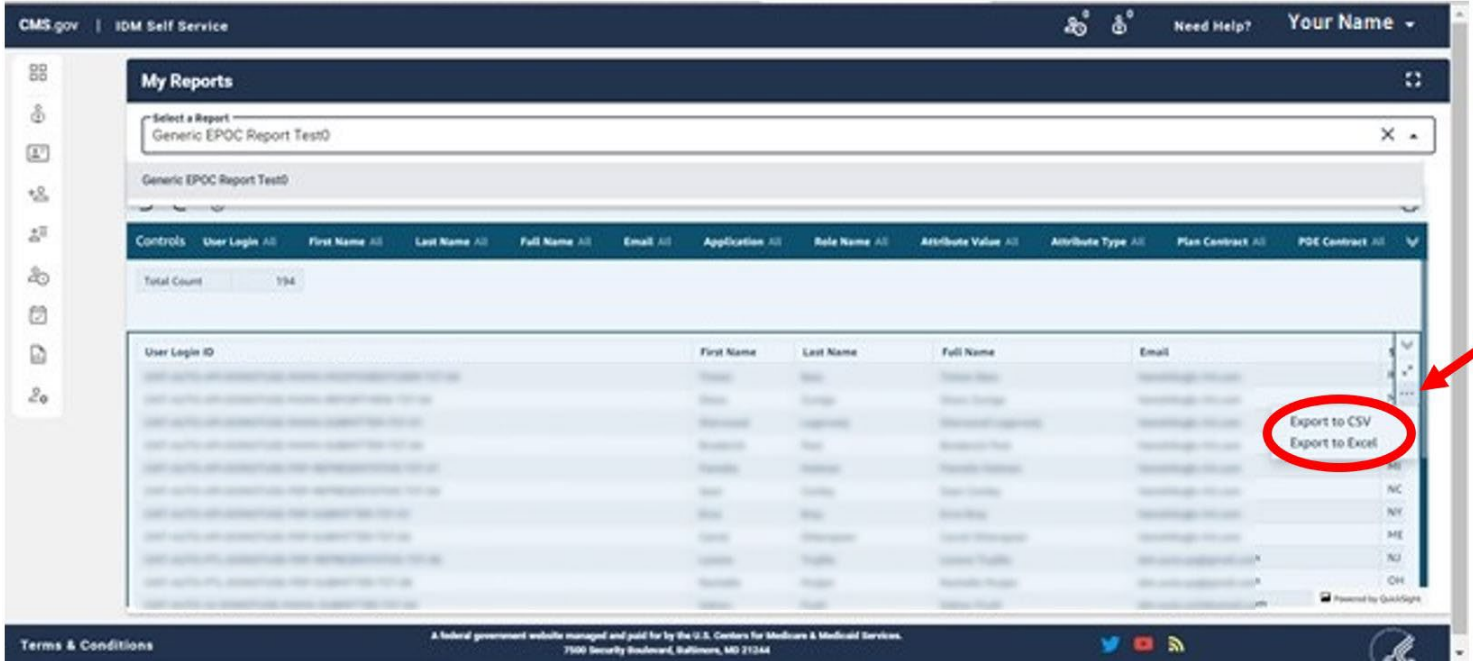


**Note:** DO NOT CLICK within this menu indicated in red to display the “Menu Options”.

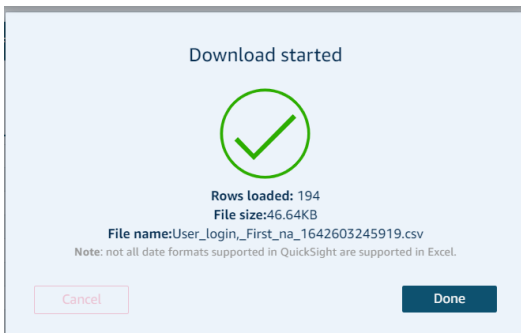


# MAPD Tailored EPOC Report Role

**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.

