



**Centers for Medicare & Medicaid Services**

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

### **Limited Data Set (LDS) Approval Workflow Training Module- Role Request**

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# 1. Overview

This training guide will cover the following:

- How to initially request for an DUA Requester Role to be able to complete a Limited Data Set (LDS) DUA.
- How to request a role with an organization that is currently in the EPPE application.
- How to add a new organization that does not exist in the EPPE application so a role can be requested.

## 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.

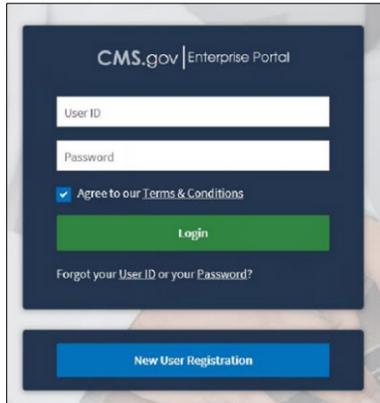


The question mark icon, when selected, will display field specific help.

## 2. How to Request a DUA Requester Role

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

Figure 1: CMS.gov Enterprise Portal website

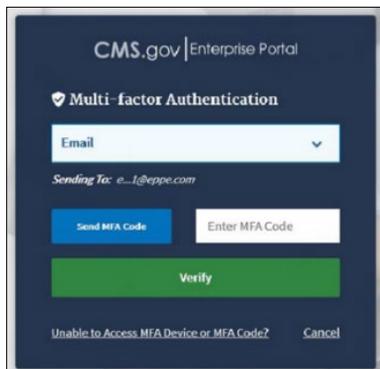


The CMS Portal Login screen is displayed.

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

The Multi-Factor Authentication page is displayed.

Figure 2: Multi-Factor Authentication



In this example, The Email option is selected as the multi-factor authentication method.

3. Click **Send MFA Code**.

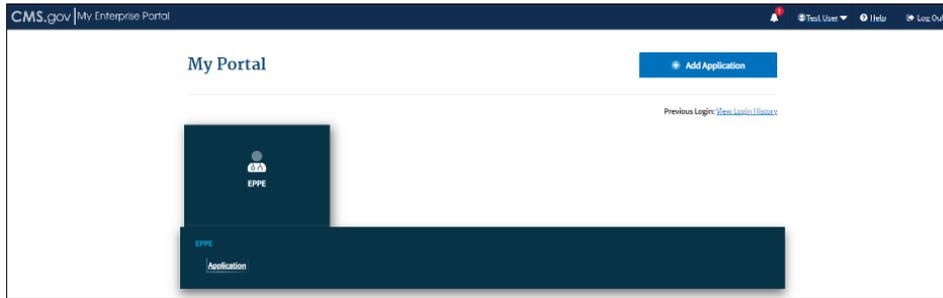
An MFA Code will be emailed.

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

**Note:** Email is the default option and will always be available in the dropdown list. Depending on the user's registration of other MFA devices, the list may vary.

The CMS Enterprise Portal Welcome Screen is displayed with the EPPE Application tile.

Figure 3: CMS Enterprise Portal Welcome Screen



6. Click the **EPPE** Application tile.

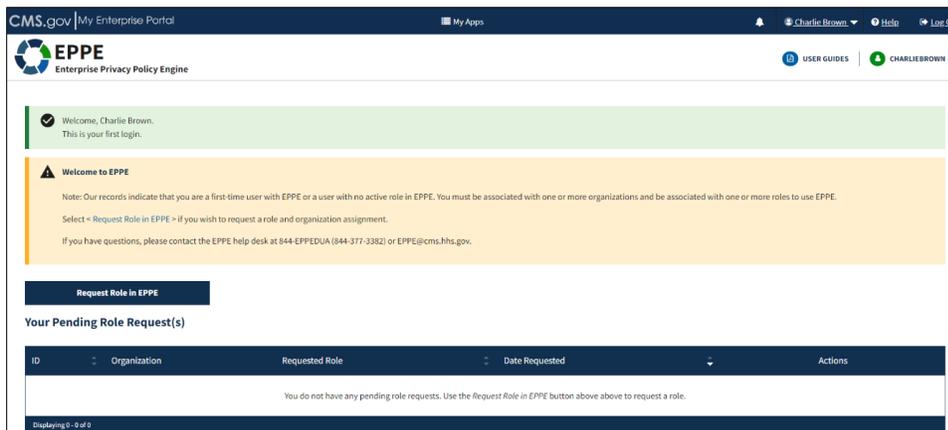
An EPPE dropdown menu opens.

7. Select **Application** to access the **EPPE** system.

## 2.1 EPPE First Time User

The EPPE First-Time User Screen is displayed.

Figure 4: EPPE First-Time User



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

The Request Role screen opens.

Figure 5: Request Role Screen

2. Enter your **Organization Name** and select your **Organization** from the dropdown.
3. Select the **DUA Requester Role** from the dropdown.
4. Click the **Submit** button.

**Note:** If you do not see your organization in the dropdown, click **Cannot locate your organization?** to add it.

## 2.2 Existing Organization

In this example, the organization is already in the EPPE system, the Role has been selected and the user has clicked **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) is displayed.

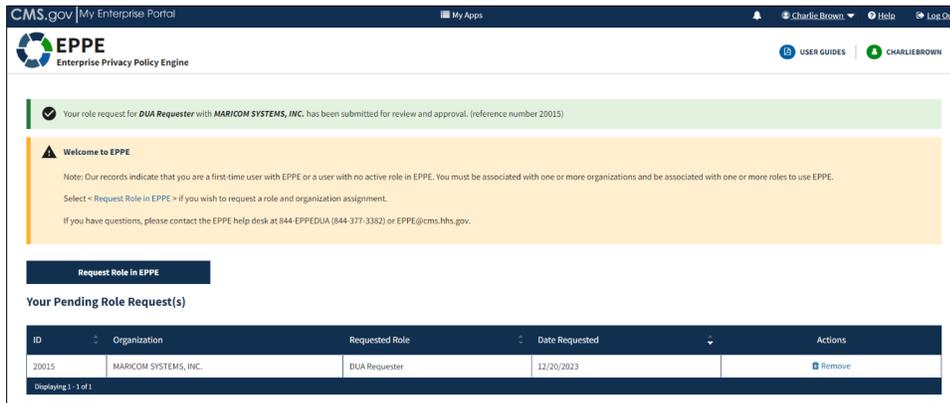
Figure 6: Attestation Screen

EPPE web page.' Below this text is a checkbox labeled 'I agree.\*'. At the bottom of the form are three buttons: 'Previous' (blue), 'Submit' (green), and 'Cancel' (blue)."/>

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

The EPPE role request submission acknowledgement, “*Your organization/role request has been submitted for approval*” is displayed.

Figure 7: Role Request Acknowledgement



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

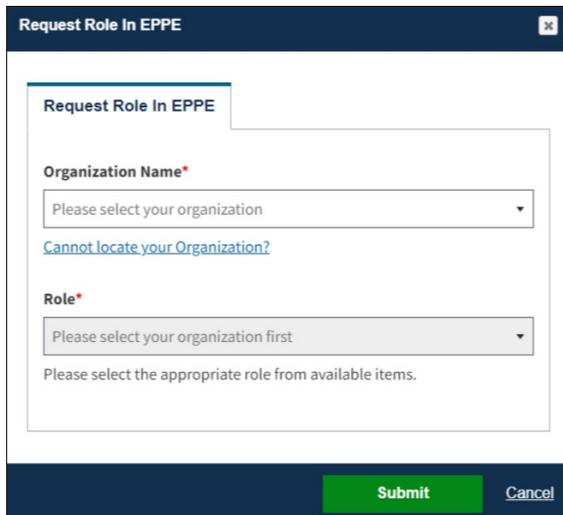
**Note:** The EPPE Administration (EPPE Admin) Team will review for approval.

## 2.3 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 8: Cannot Locate your Organization



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 9: 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\***

- Select -

**Submit** **Cancel**

5. Enter the **Organization** information:

- Organization Name
- Street Address
- City
- State
- Zip Code

6. Click **Submit**.

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

**Figure 10: 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
<b>EPPE</b>	Enterprise Privacy Policy Engine
<b>DUA</b>	Data Use Agreement
<b>CMS</b>	Centers for Medicare and Medicaid Services
<b>IDM</b>	Identity Management
<b>MFA</b>	Multi-Factor Authentication
<b>PDF</b>	Portable Document Format
<b>LDS</b>	Limited Data Set

## 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](mailto:eppe@cms.hhs.gov)

**Note:** For information on policies, forms, and other LDS DUA related information, please refer to the [Limited Data Set \(LDS\)](#) page.