Centers for Medicare & Medicaid Services
eXpedited Life Cycle (XLC)

# Enterprise Privacy Policy Engine (EPPE)

## Limited Data Set (LDS) Approval Workflow Training Module: Requester Proxy Assignment

# Training Topics

## Training Topics in This Module

- EPPE Application Access Prerequisites
- Basic Information About EPPE
- Requester Proxy Assignment
- EPPE Help Desk Information

# EPPE ACCESS PREREQUISITES

# EPPE Access Prerequisites

## CMS Enterprise Portal Access, IDM Credentials, and EPPE Access

- Obtain access to the CMS Enterprise Portal
  - Access CMS Portal
    - https://portal.cms.gov/
  - Obtain Identity Management (IDM) Credentials, Multi-Factor Authentication (MFA) and EPPE Access
    - https://www.cms.gov/files/document/eppeidm.pdf

# Basic Information About EPPE

## Icons Used Throughout the EPPE System

A red asterisks denotes that a field is required to be entered.

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

# REQUESTER PROXY ASSIGNMENT

# DUA Requester – Proxy Assignment

## Proxy Role

| Proxy Privileges |
| --- |
| • A Requester can assign up to two (2) proxies to work on their behalf within a given timeframe.<br><br>• The Requester Proxy can create, update, close and extend a DUA on behalf of a Requester.<br><br>• The Requester Proxy will be able to take action on all DUAs of a Requester while working as their Proxy.<br><br>• Once the Requester Proxy assignment ends, they will no longer have access to the DUAs they created, updated/amended, closed, or extended on behalf of a Requester.<br><br>• A Requester Proxy can work as a Proxy for multiple Requesters. |

# DUA Requester – Proxy Assignment

## EPPE Welcome Screen: My Access Menu

Enterprise Privacy Policy Engine

Logged in as: DUA REQUESTER

- EPPE Home
- DUA(s)
  - New / Re-Use
  - Update / Amend
  - Close
  - Extend
- My DUA(s)
  - Un-Finished
  - Submitted
  - Pending Action(s)
  - Approved
  - Expired
  - Closed
  - Denied
- Re-Assign DUA(s)
  - Change Contact
  - Ad Hoc Request
- Search
  - DUA Search
- My Access
  - Manage Access
- My Preference(s)
  - Email Preference
- Exit EPPE

### Welcome to EPPE

EPPE is an application that streamlines the process of requesting data from the Centers for Medicare & Medicaid Services (CMS) via an online Data Use Agreement (DUA).

Goals:

- Reduce the amount of time to process a DUA.
- Transition from a paper-based to an automated process.
- Provide a 100% traceable record of CMS data disclosures.

Training Materials: Visit the EPPE web page on cms.gov, to download Training Slide Decks for the following:

- Contractor Approval Workflow.
- LDS Approval Workflow.

Select the **Manage Access** option on the **My Access** menu.

# DUA Requester – Proxy Assignment

## Manage Proxy Role

MANAGE ACCESS

My Roles

| Organization Name | Role | Data Dissemination System | Remove |
|---|---|---|---|
| Demonstration Organization 1 | DUA REQUESTER | | Remove |
| Demonstration Organization 2 | DUA REQUESTER | | Remove |

Select an option *

- Request Additional Role
- Proxy Role

Next

1. The **Organization Name(s)** and **Role(s)** to which you have access are displayed.
2. Select the **Proxy Role** radio button.
3. Select the **Next** button.

# DUA Requester – Proxy Assignment

## Select Proxy Organization

MANAGE PROXY ROLE

*Required fields are marked with an asterisk (*).*

Select Organization* : Select an Option

Select Name * : Select an Option

Start Date *: 06/04/2019

End Date :

Add

Current Proxy Table *

Current proxy roles

| First Name | Last Name | Proxy Start Date | Proxy End Date | Action |
|---|---|---|---|---|

Quit

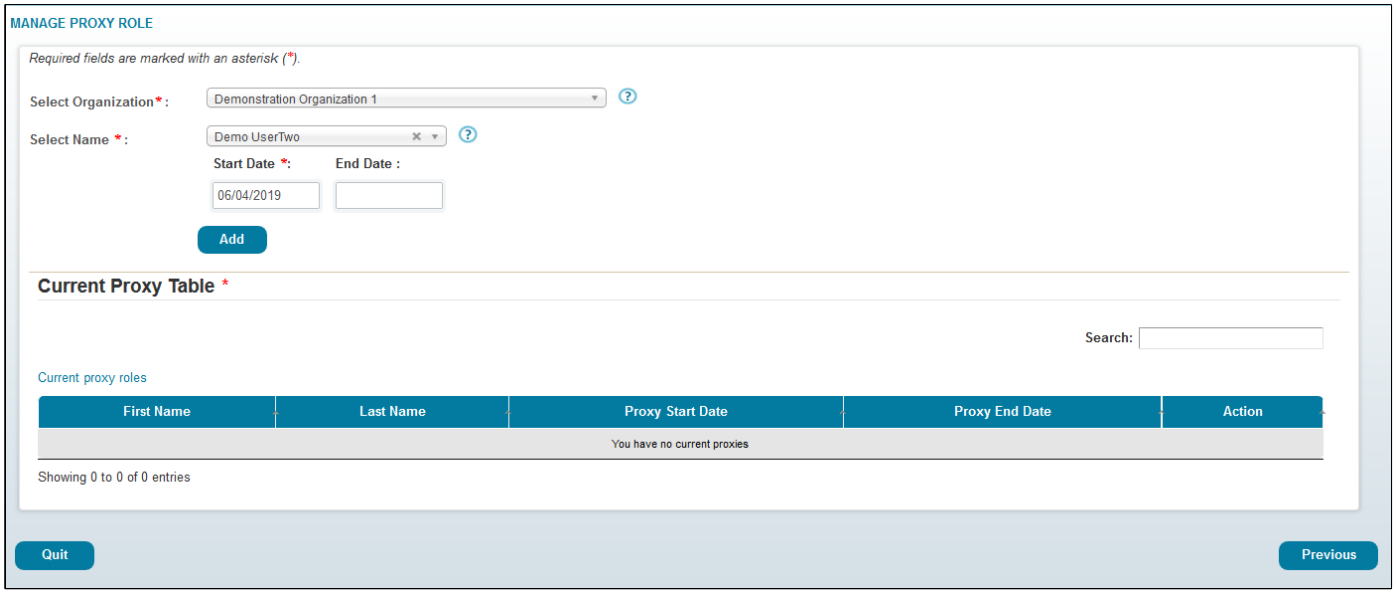
Previous

1. The **Manage Proxy** page is displayed.
2. Selects an organization from the **Select Organization** drop-down.

**Note:** The **Start Date** is pre-populated with the present date.

# DUA Requester – Proxy Assignment

## Select Proxy Role Assignment(s)



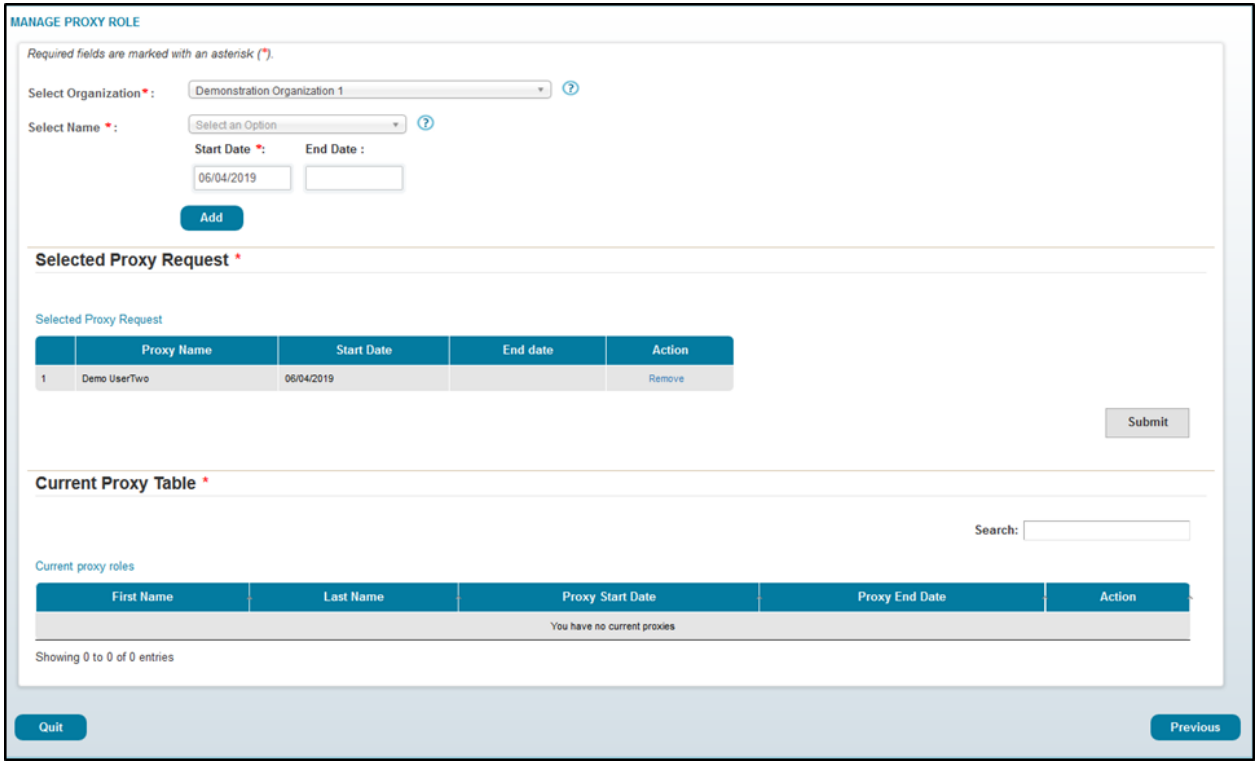

1. Select the **Proxy** from the **Select Name** drop-down.
2. Select a **Start Date** and **End Date**.
3. Select **Add**.

**Notes:**

- The **Start Date** can either be the present date or a future date.
- The **End Date** is optional.

# DUA Requester – Proxy Assignment

## Submit Proxy Role Assignment(s)




1. The selected **Proxy** is added to the Selected Proxy Request table. Continue add a second **Proxy**, if applicable.
2. Select **Submit**.

**Note:**
Proxy assignments do not require approval from other users.

# DUA Requester – Proxy Assignment

## View Current Proxy Table

MANAGE PROXY ROLE

*Required fields are marked with an asterisk (*).*

Select Organization* : Demonstration Organization 1

Select Name * : Testing UserTwo

Start Date *: 06/04/2019

End Date :

Add

**Current Proxy Table** *

Search:

Current proxy roles

| First Name | Last Name | Proxy Start Date | Proxy End Date | Action |
|---|---|---|---|---|
| Demo | UserTwo | 06/04/2019 | | Edit / Delete |

Showing 1 to 1 of 1 entries

Quit

Previous

1. Once the Proxy Role requests have been submitted, they will appear in a **Current Proxy Table**.
2. Select **Quit** to return to the **EPPE Welcome** screen or select **Previous** and return to the **Manage Access** screen.

# DUA Requester – Proxy Assignment

- Please refer to the **Requesting Additional Roles** training module for more information on available roles as well as requesting additional roles in EPPE.
- Please refer to the **Remove a Role** training module for more information on removing a role in EPPE.

# 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

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