



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

# Enterprise Privacy Policy Engine (EPPE)



**Contractor 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, EIDM Credentials, and EPPE Access

- Obtain access to the CMS Enterprise Portal
  - Access CMS Portal
    - <https://portal.cms.gov/>
  - Download the Symantec Validation & ID Protection (VIP) Access Multi-Factor Authentication (MFA) Software
    - <https://vip.symantec.com/>
- Obtain Enterprise Identity Management (EIDM) Credentials and EPPE Access
  - <https://www.cms.gov/Research-Statistics-Data-and-Systems/Computer-Data-and-Systems/Privacy/EIDMNewUser.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.

# PROXY ASSIGNMENT

# DUA Requester – Proxy Assignment

## Proxy Role

### Proxy Privileges

- A Requester can assign up to two (2) proxies to work on their behalf at a given timeframe.
- The Requester Proxy can create, update/amend, close and extend a DUA on behalf of a Requester.
- The Requester Proxy will be able to take action on all DUAs of a Requester while working as their Proxy.
- 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.
- A Requester Proxy can work as a Proxy for multiple Requesters.

# DUA Requester – Manage Access

## EPPE Menu

CMS.gov My Enterprise Portal My Apps User Name Help Log Out

### 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.

Version 27.0

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

# DUA Requester – Manage Access

## EPPE Roles Display

**MANAGE ACCESS**

My Roles

Organization Name	Role	Data Dissemination System	Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	CMS CONTACT (COR)		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	DATA ENTRY		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	NON DUA DATA ENTRY		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	PAYMENT COORDINATOR		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	RESEARCHER DUA MANAGEMENT TEAM		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	CONTRACTOR DUA MANAGEMENT TEAM		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	RESEARCH DATA ASSISTANCE CENTER (ResDAC)		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	NON-DUA VIEWER		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	EPPE ADMINISTRATOR		Remove
UNIVERSITY OF CHICAGO	DUA VIEWER		Remove
JOHNS HOPKINS UNIVERSITY (JHU)	DUA REQUESTER		Remove

Select an option \*

Request Additional Role ?

Proxy Role ?

**Next**

1. The Roles and Organization Names to which you have access are displayed.
2. Select the Proxy Role radio button.
3. Select the **Next** button.

# DUA Requester – Proxy Assignment

## MANAGE PROXY ROLE

MANAGE PROXY ROLE

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

Select Organization\*:  ?

Select Name\*:  ?

Start Date\*:  End Date:

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**Current Proxy Table \***

Current proxy roles

First Name	Last Name	Proxy Start Date	Proxy End Date	Action
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Manage Proxy page is displayed for user to populate.

# DUA Requester – Proxy Assignment

## MANAGE PROXY ROLE

**MANAGE PROXY ROLE**

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

Select Organization \*: Video Training Company 1 ?

Select Name \*: REQ UserFour ?

Start Date \*: 09/24/2018

End Date :

**Add**

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**Selected Proxy Request \***

	Proxy Name	Start Date	End date	Action
1	REQ UserThree	09/24/2018		Remove
2	REQ UserFour	09/24/2018		Remove

**Submit**

1. Requester selects organization.
2. Select Proxy's name.
3. Select start and end date. The end date is an optional field.
4. Select "Add" and "Submit."

# DUA Requester – Proxy Assignment

## MANAGE PROXY ROLE

**Current Proxy Table \***

Search:

Current proxy roles

First Name	Last Name	Proxy Start Date	Proxy End Date	Action
REQ	UserThree	09/24/2018		<a href="#">Edit / Delete</a>
REQ	UserFour	09/24/2018	09/24/2019	<a href="#">Edit / Delete</a>

Showing 1 to 2 of 2 entries

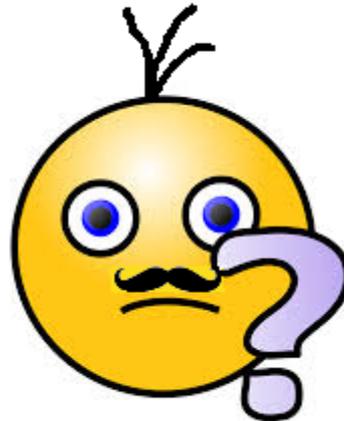
[Quit](#) [Previous](#)

1. Once the Proxy Role requests have been submitted they will appear in a “Current Proxy Table.”
2. The Requester can “Quit” and will be returned to the EPPE homepage.

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