

**Centers for Medicare & Medicaid Services** 

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

## Contractor Approval Workflow Training Module -Requester Proxy Assignment

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## **Table of Contents**

1.	Over	view	1
	1.1 1.2	EPPE Access Prerequisites Icons Used Throughout the EPPE System	1 1
2.	Prox	y Assignment	2
	2.1 2.2	Request Additional Roles Remove a Role	3 3
3.	Acro	nyms	4
4.	EPPE	E Help Desk Information	5

# List of Figures

Figure 1: EPPE Welcome Screen	2
Figure 2: EPPE Roles/Proxy Display	2
Figure 3: Sample Proxy Attributes	2
Figure 4: Manage Proxy Role	3

# List of Tables

Table 1: Acronyms		4
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#### 1. Overview

This Training Guide will cover the following:

- How to Request for a Proxy Assignment as a Contractor DUA Requester.
- How to Request for Additional Roles as a Contractor DUA Requester.
- How to Remove a Role as a Contractor DUA Requester.

### 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.



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

#### 2. Proxy Assignment

Proxy Role/Privileges:

- A Requester can assign up to two (2) proxies to work on their behalf at a given time.
- The Proxy can create, update/amend, close, and extend DUAs on behalf of a Requester.
- A Requester Proxy can act on all DUAs of a Requester while working as their Proxy.
- Once the Requester Proxy assignment ends, the user 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.

Figure 1: EPPE Welcome Screen

	EPPE	Privacy Policy Engine		Logged In As	EPPE Administrator	¢		
*	DUA(s)	PENDING REQUEST(S) ~	BATCH REQUESTS	MANAGEMENT ~	DUA SEARCH:		۹	Advanced Search

1. Select your User ID menu item ("TESTCMSCOR" in this example).

The Roles and Organization Names to which you have access are displayed.

Figure 2: EPPE Roles/Proxy Display

Mana	age P	rox	(y Role(s)											
View	Edit	Curre	ent EPPE Role(s)	Pending	g EPPE Role Request(s)	Manage Proxy Assignment(	(s) Current Pro	xy Assignment(s)						
42820	ASSIGN PROXY TO WORK ON MY BEHALF anage Proxy Role Assignment(s)													
he EPPE	users listed	d belo	w have been assign	ned as a p	roxy on your behalf.									
he EPPE Name	users listed	d belov	w have been assign	ned as a p	roxy on your behalf. Organization		:	Email Address	Phone		Start Date	≎ End	l Date 🌐	Actions
he EPPE Name Bharath	users lister	d belor	w have been assign Role DUA Requester	ned as a p	roxy on your behalf. Organization SCOPE INFOTECH, INC		:	Email Address testcor@scopeinfotechinc.com	Phone n (770) 30	9-8117	Start Date 11/04/2022	‡ End	l Date 🌐	Actions
he EPPE Name Bharath Tester U	users listee ni Gajula Jser	d belon	w have been assign Role DUA Requester DUA Requester	ned as a p	roxy on your behalf. Organization SCOPE INFOTECH, INC SCOPE INFOTECH, INC			Email Address testcor@scopeinfotechinc.com tu89522@gmail.com	Phone n (770) 309 (443) 239	9-8117 :	Start Date 11/04/2022 11/14/2022	‡ End	l Date 🌲	Actions <ul> <li>Edit   </li> <li>Edit   </li> <li>Remove</li> </ul>

- 2. Click the Manage Proxy Assignment(s) tab to add or remove proxies.
- Click the Current Proxy Assignment to see who is currently assigned to your account as a proxy.
- 4. Click the Assign Proxy to Work On My Behalf to assign a Proxy to your account.

The My Roles table will appear, and the Manage Proxies pop-up opens for the user to populate. The following shows a sample of attributes.

#### Figure 3: Sample Proxy Attributes

Select Proxy	
For Which Organization*	
Select an organization.	•
For Which Role*	
Please select the organization	on first 👻
Select Person To Work On M	y Behalf*
Please select a role first.	•
Start Date*	End Date
01/08/2024	mm/dd/vvvv 🖃

- 5. Select
  - For Which Organization.
  - For Which Role
  - Select Person To Work On My Behalf
  - Start Date and End Date.
- 6. Click Submit.

Submitted Proxy role requests will appear in the Manage Role's page

Figure 4: Manage Proxy Role

MS.g	ov M	y Enterprise Portal			I	■ My Apps		٨	. <u>Tester COR</u>	.▼ Ø <u>Help</u>	e 🕞 <u>Log Out</u>
EPPE Enterprise Privacy Policy Engine						Logged In As:	EPPE Administrator	0		DES 🚺	TESTCMSCOR
*	DUA(s)	PENDING REQUEST	r(s) ~	BATCH REQUESTS	MANAGEMENT	· •	DUA SEA	RCH:		Q Adva	anced Search
Ø	The <b>DU</b>	A Requester [HEALTHCA	RE INGENU	ITY, LLC] proxy role h	has been assigned	to <b>Stephanw No</b>	wak.				
Manage Proxy Role(s)											
View	Edit	Current EPPE Role(s)	Pending E	PPE Role Request(s)	Manage Proxy	Assignment(s)	Current Proxy Assignment(s)				

#### 2.1 Request Additional Roles

Refer to the **Request Additional Roles** training module for more information on available roles as well as requesting additional roles in EPPE.

#### 2.2 Remove a Role

Refer to the **Remove a Role** training module for more information on removing a role in EPPE.

### 3. Acronyms

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

5