



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

Enterprise Privacy Policy Engine (EPPE)



**Contractor Approval Workflow Training
Module - COR Proxy Assignment**



Training Topics

Training Topics in This Module

- EPPE Access Prerequisites
- Basic Information About EPPE
- Proxy Role 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.

CMS CONTACT (COR) PROXY ASSIGNMENT

CMS Contact (COR) – Proxy Assignment

COR PROXY'S PRIVILEGES

COR PROXY PRIVILEGES

- CMS Contact (COR) can assign up to two proxies.
- The COR proxy can approve, deny and request more information on behalf of the CMS Contact (COR).
- The COR proxy will be able to take action on all the DUAs that the CMS Contact (COR) is assigned to while working as their proxy.
- Once the proxy assignment ends they will no longer have access to the DUAs they have approved denied or requested more information on behalf of the CMS Contact (COR).
- A COR proxy can work as a proxy for multiple CMS Contact (CORs).

CMS Contact (COR) – Proxy Assignment

EPPE Menu

The screenshot displays the EPPE application interface. On the left is a vertical navigation menu with the following items: EPPE Home, DUA(s), DUA(s) - Pending Actions, Extension Request(s), DUA(s) - Pending Extensions, Re-Assign Request(s), Pending Change Contact Request(s), Search, DUA Search, My Access, Manage Access (highlighted with a red box), My Preference(s), Email Preference, and Exit EPPE. The main content area features a 'Welcome to EPPE' heading, a brief description of the application's purpose, a list of goals, and training material information.

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.

CMS Contact (COR) – Proxy Assignment

EPPE Roles Display

MANAGE ACCESS

Please log out and log back in to confirm your request has been processed.

My Roles

Organization Name	Role	Data Dissemination System	Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	RESEARCH DATA ASSISTANCE CENTER (ResDAC)		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	EPPE ADMINISTRATOR		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)	CMS CONTACT (COR)		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	ADVISORY BOARD COORDINATOR		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	CONTRACTOR DUA MANAGEMENT TEAM		Remove
CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	PAYMENT COORDINATOR		Remove
BOSTON UNIVERSITY	DUA REQUESTER		Remove
UNIVERSITY OF MARYLAND	DUA REQUESTER		Remove
GEORGE WASHINGTON UNIVERSITY (GWU)	DUA REQUESTER		Remove

Select an option *

Request Additional Role ?

Proxy Role ?

Next

1. The My Roles table displays with the **Organization Names** and **Roles** to which you have access.
2. Select the radio button associated with Proxy role.
3. Select the **Next** button.

CMS Contact (COR) – Proxy Assignment

MANAGE PROXY ROLE SCREEN

MANAGE PROXY ROLE

Required fields are marked with an asterisk ().*

Select Organization* : ?

Select Name* : ?

Start Date* : End Date :

Add

Current Proxy Table *

Current proxy roles

First Name	Last Name	Proxy Start Date	Proxy End Date	Action
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Quit **Previous**

The Manage Proxy Role page is displayed.

CMS Contact (COR) – Proxy Assignment

Manage Proxy Role Screen

MANAGE PROXY ROLE

Required fields are marked with an asterisk (*).

Select Organization *: ?

Select Name *: ?

- Aaron Amanuel
- AARON BURNETT
- AARON LARTEY
- AARON NADEAU
- AARON WESOLOWSKI
- Abigail Huffman
- Abby Kahn
- ABIGAIL RYAN
- ABRAHAM VERGHIS
- ABRAHAM HOI I ANNER

Current Proxy Table

Search:

Current proxy roles

First Name	Last Name	Proxy Start Date	Proxy End Date	Action
You have no current proxies				

Showing 0 to 0 of 0 entries

1. Select your organization from the dropdown.
2. Select your COR Proxy's name from the dropdown.

CMS Contact (COR) – Proxy Assignment

MANAGE PROXY ROLE

MANAGE PROXY ROLE

Required fields are marked with an asterisk (*).

Select Organization*: ?

Select Name*: x ?

Start Date*: End Date:

Selected Proxy Request *

Selected Proxy Request

	Proxy Name	Start Date	End date	Action
1	AARON NADEAU	09/24/2018		Remove
2	JENNIFER HARLOW	09/24/2018		Remove

1. Select the start and end date. The end date is optional.
 2. Select the “Add” button.
 3. Select “Submit.”
- Note: You can assign up to two COR proxies.

CMS Contact (COR) – Proxy Assignment

MANAGE PROXY ROLE

Current Proxy Table *

Search:

Current proxy roles

First Name	Last Name	Proxy Start Date	Proxy End Date	Action
AARON	NADEAU	09/24/2018		Edit / Delete
JENNIFER	HARLOW	09/24/2018	09/24/2019	Edit / Delete

Showing 1 to 2 of 2 entries

Quit Previous

1. The COR proxies appear in the current proxy table.
2. The start and end dates are displayed.
3. User can edit or delete the COR proxy information.

CMS Contact (COR) – Proxy Assignment

MANAGE PROXY ROLE

Select Organization *: CENTERS FOR MEDICARE and MEDICAID SERVICES (C)

Select Name *: Aaron Amanuel

Start Date *: 09/24/2018

End Date :

Add

Current Proxy Table *

Current proxy roles

First Name	Last Name	Proxy Start Date	Proxy End Date	Action
AARON	NADEAU	09/24/2018		Edit / Delete
JENNIFER	HARLOW	09/24/2018	09/24/2019	Edit / Delete

Showing 1 to 2 of 2 entries

Search:

Edit Proxy

First Name
AARON

Last Name
NADEAU

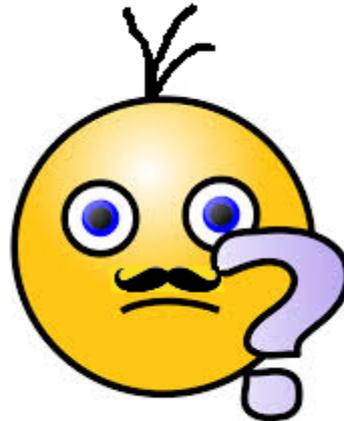
Start Date
09/24/2018

End Date

Cancel Submit

1. If to “Edit” a proxy, a pop-up appears and you can “Edit” the “Start” and “End” date.
2. You can also delete a Proxy which will end their Proxy assignment.
Note: You cannot select a past start date.

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