

**Centers for Medicare & Medicaid Services** 

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

# Limited Data Set (LDS) Approval Workflow Training Module-Requesting Additional Roles

Version 2.0 01/22/2024

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### 1. Overview

This Training Guide will cover the following:

- How to Request an additional role as an LDS DUA Requester
- How to Remove a Role as an LDS DUA Requester
- How to manage the Requester Proxy Assignment

### 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. Requesting Additional Roles

The following EPPE roles can be requested through Manage Access:

- **DUA Requester:** Creates, Updates, and Submits the DUA.
- **DUA Viewer:** Can Search and View DUAs within their organization.

You can request additional roles from the Welcome screen.

#### Figure 1: EPPE Welcome Screen

	EPPE Enterprise Privac	y Policy Engir	ie			Logged In As: DUA	Requester - Switch Roles *		USER'S PROFILE
*	NEW / RE-USE DUA	MY DUA(S)	SHIPPED ORDERS	RE-ASSIGN DUA(S)		DUA SEARCH	223445	Q	Z <sup>*</sup> ADVANCED SEARCH
Wel EPPE i	come To EPI	<b>PE</b> treamlines the	process of requesting	data			Logged In As: DU/	A Requester	

1. Click your **User ID** menu item on the top right of the EPPE Welcome page ("USER'S PROFILE" for this example).

Your view User Profile screen will be displayed.

#### Figure 2: EPPE Roles

Curre	urrent EPPE Role(s)									
View	Edit	Current EPPE Role(s)	Pending EPPE Role Request(s)	Manage Proxy Assignment(s)	Curre	ent Proxy Assignment(s)				
Vour										
Your C	our current EPPE kole(s)									
ID		Organization				Role			Date Added	Actions
100023		The Jedi Camp				DUA Requester			01/02/2024	🛱 Remove

- 2. Click the Current EPPE Role(s) tab.
- 3. Click the Request Role in EPPE button.

#### Figure 3: Organization Selection

•	Organization Name*
•	
	Please select your organiz
	Cannot locate your Organiz
	Role*
v	Please select your organiz
ailable items.	Please select the appropria
ailable items.	Role* Please select your organiz Please select the appropria

4. Enter the **Organization Name** to display a list of organizations in the dropdown menu.

#### Figure 4: Add Role

quest Role In EPPE		
Request Role In EPPE		
Organization Name*		
Test Org		•
Role*		
Please select a role		•
Please select the appropria	te role from available iten	ns.
	Submit	Cano

5. Begin to type the **Organization Name** and select the Organization from the dropdown.

Note: The Organization must be selected from the dropdown list.

6. Select a **Role** from the eligible roles for the organization in the dropdown.

Note: A role must be selected from the list.

7. Click Submit.

**Note:** The submitted request will have to go through CMS review and approval prior to obtaining the requested role.

The Organization and Role will be displayed in the **Pending EPPE Role Request(s)** table.

Figure 5: Role Request Confirmation



8. You can add another role request(s) for the same organization or select another organization.

#### Figure 6: Cannot Locate Organization

Request Role In EPPE	
Organization Name*	
Please select your organization	•

If the organization does not exist in the EPPE System, click "Cannot locate the Organization?"

#### Figure 7: Request 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*	\$	
	Submit	Cancel

The **Add Organization** pop-up has the message, "*The new organization will be available for you to select only upon approval. Do you wish to continue with the request?*"

9. Select the Yes radio button.

10. Enter the Organization information:

- Organization Name
- Street Address (1 and 2)
- City
- State
- Zip Code
- 11. Click Submit.

The **Confirmation** message, "Your request has been successfully submitted and is pending approval. You will receive a follow-up email notification." is displayed.

Figure 8: Add New Organization Submission Confirmation

*UG Org* was created and is pending approval. Once approved, you will be able to add them to this DUA.

A new Organization requires EPPE Administration Approval. Once the organization has been approved by the EPPE Administrator you can submit your role request.

## 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
LDS	Limited Data Set
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

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