Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - Requester Proxy Assignment

Version 2.0

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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: https://www.cms.gov/files/document/eppeidm.pdf
- Access CMS Portal: https://portal.cms.gov/

1.2   Icons Used Throughout the EPPE System

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

⑦   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.
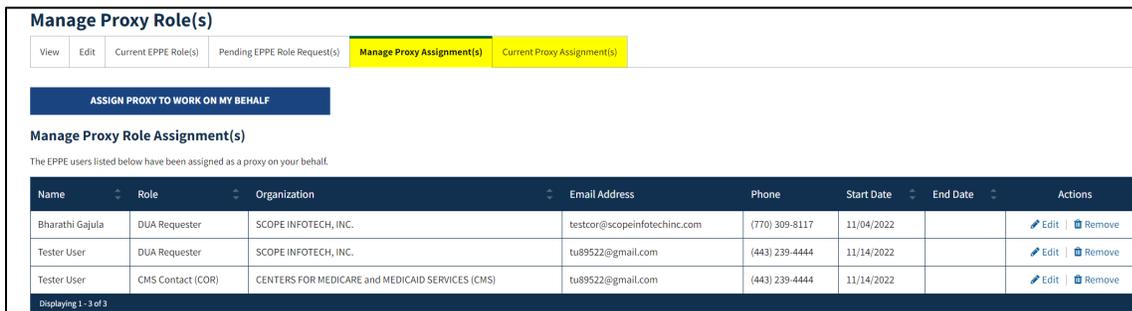- A Requester Proxy can work as a Proxy for multiple Requesters.

Figure 1: EPPE Welcome Screen

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

2. Click the **Manage Proxy Assignment(s)** tab to add or remove proxies.
3. 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.
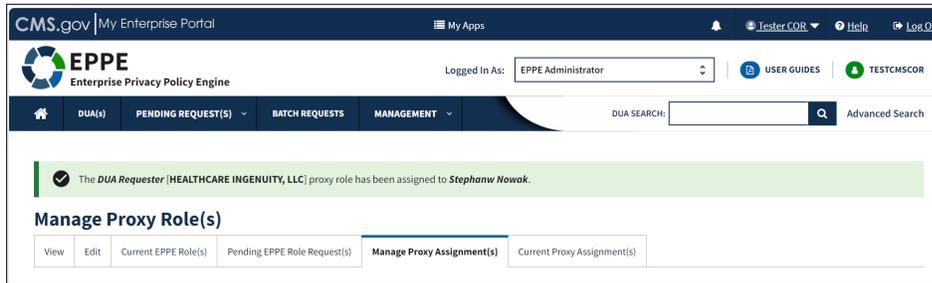
Figure 3: Sample Proxy Attributes
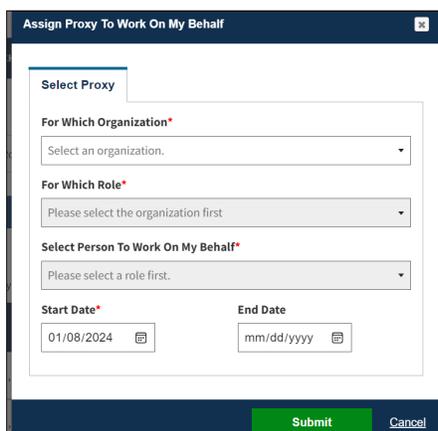
5. Select
   - **For Which Organization**.
   - **For Which Role**
   - **Select Person To Work On My Behalf**
   - **Start Date** and **End Date**.
6. Click **Submit**.

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

Figure 4: Manage Proxy Role

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

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