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

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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: 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.

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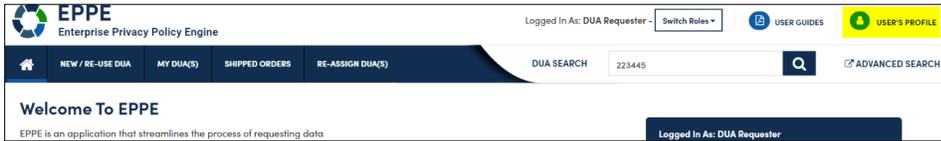
1. Click your **User ID** menu item on the top right of the EPPE Welcome page ("USER'S PROFILE" for this example).

Your view **User Profile** screen will be displayed.

Figure 2: EPPE Roles
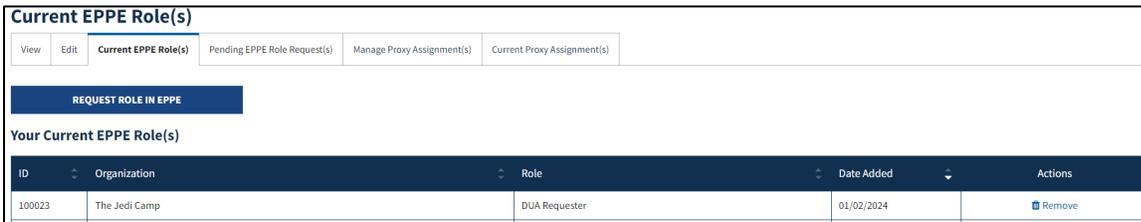
2. Click the **Current EPPE Role(s)** tab.
3. Click the **Request Role in EPPE** button.

Figure 3: Organization Selection
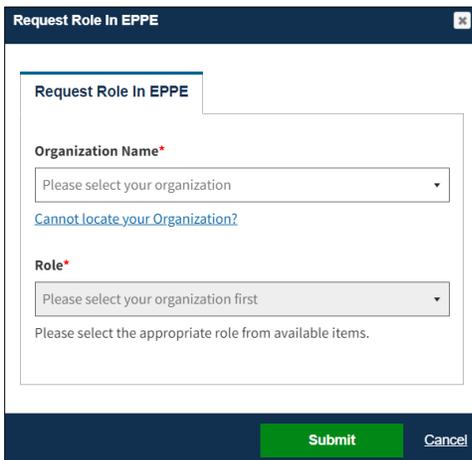
4. Enter the **Organization Name** to display a list of organizations in the dropdown menu.

Figure 4: Add Role

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

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

Figure 7: Request New Organization
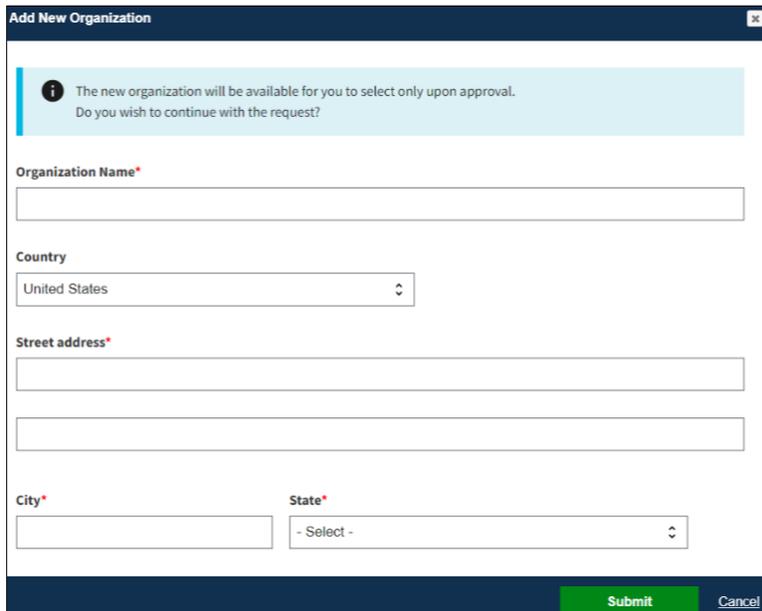
The **Add Organization** pop-up has the message, "*The new organization will be available for you to select only upon approval. Do you wish to continue with the request?*"

    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

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 Limited Data Set (LDS) page.