



Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Limited Data Set (LDS) Approval Workflow Training Module- Requester Proxy Assignment

Version 2.0

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Table of Contents

1 Overview	1
1.1 EPPE Access Prerequisites	1
1.2 Icons Used Throughout the EPPE System	1
2 Requester Proxy Assignment	2
2.1 Requesting Additional Roles	4
2.2 Remove A Role.....	4
3 Acronyms and Glossary	5
4 EPPE Help Desk Information	6

List of Figures

Figure 1: EPPE Welcome Screen	2
Figure 2: User Profile Page with Tabs.....	2
Figure 3: Manage Proxy Role(s) Tab	2
Figure 4: Assign Proxy to Work on My Behalf.....	3
Figure 5: Manage Proxy Role Assignment(s) Table with a New Proxy Added	3
Figure 6: Current Proxy Role Assignment(s) Table	4

List of Tables

Table 1: Acronyms	5
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1 Overview

This Training Guide will cover the following:

- How to manage the LDS DUA Requester Proxy Assignment
- How to Request Additional Roles as a LDS Requester
- How to Remove a Role as a LDS Requester
- Refer to EPPE Help Desk Information.

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 Requester Proxy Assignment

Notes:

- A Requester can assign up to two (2) proxies to work on their behalf within a given timeframe.
- The Requester Proxy can create, update, close, and extend a DUA on behalf of a Requester.
- The Requester Proxy will be able to take action on all DUAs of a Requester while working as their Proxy.
- Once the Requester Proxy assignment ends, they 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. Click the **User ID** from the top right of the Welcome screen (shown here as TESTCMSCOR).

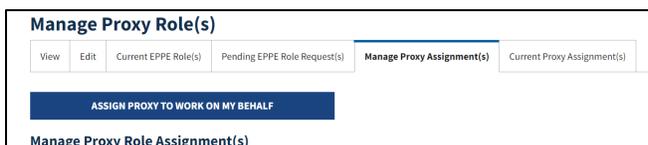
Figure 2: User Profile Page with Tabs



User's Profile page appears. It contains profile settings that are found within tabs.

2. Click the **Manage Proxy Assignment(s)** tab.

Figure 3: Manage Proxy Role(s) Tab



The Manage Proxy Role workflow appears.

3. Click the **ASSIGN PROXY TO WORK ON MY BEHALF** button.

The Assign Proxy to Work on My Behalf pop-up appears.

Figure 4: Assign Proxy to Work on My Behalf

4. Select **For Which Organization**
5. Select **For Which Role**
6. Choose **Select Person to Work on My Behalf**
7. Enter a **Start Date** and **End Date**.
8. Click **Submit**

Note: **Start Date** is pre-populated with the present date and can be the present or a future date.

Figure 5: Manage Proxy Role Assignment(s) Table with a New Proxy Added

✓ The *DUA Requester* [Test Org] proxy role has been assigned to *test fest*.

Manage Proxy Role(s)

View Edit Current EPPE Role(s) Pending EPPE Role Request(s) **Manage Proxy Assignment(s)** Current Proxy Assignment(s)

ASSIGN PROXY TO WORK ON MY BEHALF

Manage Proxy Role Assignment(s)

The EPPE users listed below have been assigned as a proxy on your behalf.

Name	Role	Organization	Email Address	Phone	Start Date	End Date	Actions
test test	DUA Requester	Test Org	test@email.com	(234) 567-8999	01/08/2024	01/17/2024	Edit Remove
Bharathi Gajula	DUA Requester	SCOPE INFOTECH, INC.	testcor@scopeinfotechinc.com	(770) 309-8117	11/04/2022		Edit Remove
Tester User	DUA Requester	SCOPE INFOTECH, INC.	tu89522@gmail.com	(443) 239-4444	11/14/2022		Edit Remove
Tester User	CMS Contact (CDR)	CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	tu89522@gmail.com	(443) 239-4444	11/14/2022		Edit Remove

Displaying 1 - 4 of 4

The selected **Proxy** is added to the Manage Proxy Role Assignment(s) table. Continue to add a second **Proxy**, if applicable.

9. In the table above click **Edit** to make changes to any proxies seen in the table.
10. In the table above click **Remove** to delete any proxies seen in the table.

Review all the current proxy role assignments by clicking the **Current Proxy Role(s) Assignments** tab.

Figure 6: Current Proxy Role Assignment(s) Table

The screenshot shows the EPPE user interface. At the top, it says 'EPPE Enterprise Privacy Policy Engine'. The user is logged in as 'DUA Requester'. There are navigation tabs for 'NEW / RE-USE DUA', 'MY DUA(s)', and 'RE-ASSIGN DUA(s)'. Below these is a search bar for 'DUA SEARCH:' and an 'Advanced Search' button. The main heading is 'Current Proxy Assignment(s)'. Below this heading are several tabs: 'View', 'Edit', 'Current EPPE Role(s)', 'Pending EPPE Role Request(s)', 'Manage Proxy Assignment(s)', and 'Current Proxy Assignment(s)'. The 'Current Proxy Assignment(s)' tab is active. Underneath, it says 'Your Current Proxy Assignment(s)' and 'The EPPE Users listed below have assigned you as their proxy:'. Below this is a table with the following data:

Name	Role	Organization	Email Address	Phone	Start Date	End Date
Stephanw Nowak	CMS Contact (COR)	CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	snowak@scopeinfotechinc.com	(410) 410-4100	12/14/2023	
Tester User	CMS Contact (COR)	CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	tu89522@gmail.com	(443) 239-4444	11/14/2022	
Tester User	DUA Requester	SCOPE INFOTECH, INC.	tu89522@gmail.com	(443) 239-4444	11/07/2022	
Tester User	DUA Requester	HCD Organization	tu89522@gmail.com	(443) 239-4444	11/07/2022	

At the bottom of the table, it says 'Displaying 1 - 4 of 4'.

2.1 Requesting Additional Roles

Refer to the Requesting 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 and Glossary

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.