



Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - COR Proxy Assignment

Version 2.0

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1. Overview

If you are new to EPPE there are resources to guide you through:

- How to view your current proxy users.
- How to add new proxy users.
- How to edit proxy users.

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.

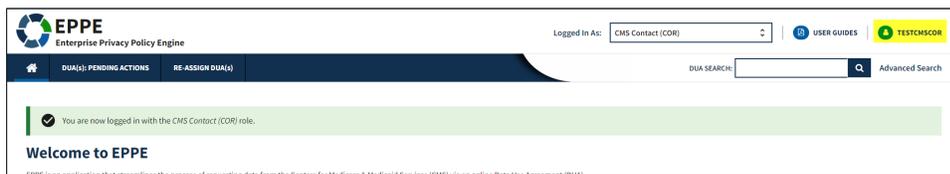
2. Proxy Assignment

Note: All directions that follow are for the CMS Contact (COR) user.

The COR can assign up to two proxies. Each has a series of privileges they are granted:

- 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, the proxy will no longer have access to the DUAs they have approved, denied, or requested more information for, on behalf of the CMS Contact (COR).
- A COR proxy can work as a proxy for multiple CMS Contacts (CORs).
- Log in to the EPPE application.

Figure 1: EPPE Menu



1. Click your **User ID** option on the top navigation menu (“TESTCMSCOR” in this example) to obtain the User Profile Page.

Select the **Manage Proxy Assignment(s)** tab on the User Profile Page.

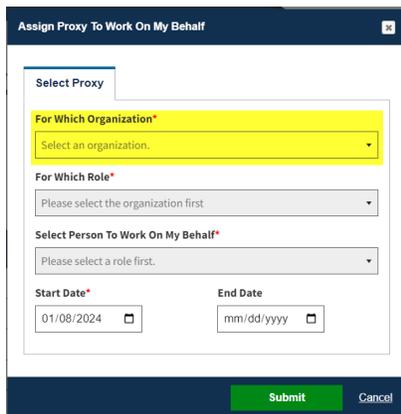
Figure 2: EPPE Manage Proxy Roles Display



2. Click **ASSIGN PROXY TO WORK ON MY BEHALF** button.

The Assign Proxy To Work On My Behalf pop-up is displayed.

Figure 3: Manage Proxy Role Screen - Organization



3. Select your organization from the **For Which Organization** dropdown.

Figure 4: Manage Proxy Role Screen - Role

The screenshot shows a web form titled "Assign Proxy To Work On My Behalf". It contains several fields: "For Which Organization*" (dropdown), "For Which Role*" (dropdown, highlighted in yellow), "Select Person To Work On My Behalf*" (dropdown), "Start Date*" (text input with a calendar icon, showing "01/08/2024"), and "End Date" (text input with a calendar icon, showing "mm/dd/yyyy"). At the bottom are "Submit" and "Cancel" buttons.

4. Select your role from the **For Which Role** dropdown.

Figure 5: Manage Proxy Role Screen - Name

The screenshot shows the same form as Figure 4, but with the "Select Person To Work On My Behalf*" dropdown highlighted in yellow. The "For Which Role*" dropdown is now greyed out.

5. Select your COR Proxy's name from the dropdown.

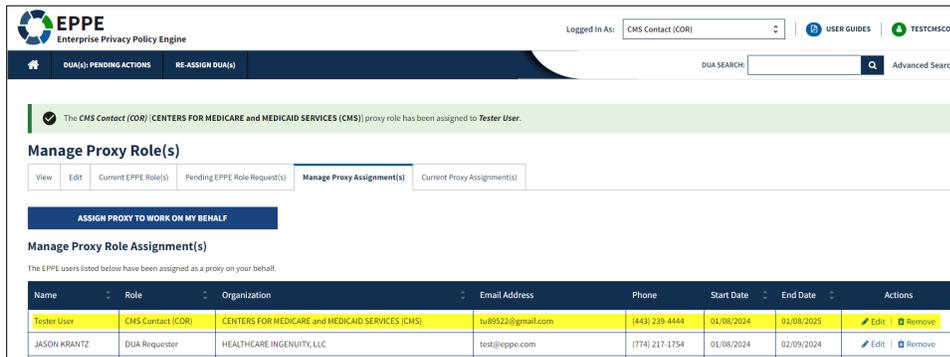
Figure 6: Manage Proxy Role Screen – Start and End Date

The screenshot shows the same form as Figure 4, but with the "Start Date*" and "End Date" fields highlighted in yellow.

6. Select the **Start Date** and **End Date**.
7. Click the **Submit** button.

A confirmation message is displayed, and the COR proxy appear in the current proxy table. The start and end dates are displayed.

Figure 7: Submit Proxy Role



Note: You can assign up to two COR proxies and edit or delete the COR proxy information.

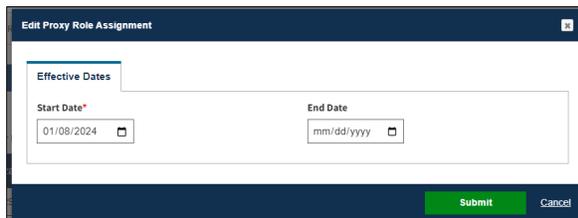
Figure 8: Edit Proxy Role

Name	Role	Organization	Email Address	Phone	Start Date	End Date	Actions
Tester User	CMS Contact (COR)	CENTERS FOR MEDICARE and MEDICAID SERVICES (CMS)	tu89522@gmail.com	(443) 239-4444	01/08/2024	01/08/2025	Edit Remove
JASON KRANTZ	DUA Requester	HEALTHCARE INGENUITY, LLC	test@eppe.com	(774) 217-1754	01/08/2024	02/09/2024	Edit Remove

8. Click the **Edit** action next to a proxy to update it.

The Edit Proxy Role Assignment pop-up opens.

Figure 9: Edit Proxy Role Assignment



The Start Date, and End Date are editable fields.

9. Once updates are made, click **Submit**.

3. Acronyms

The following are acronyms used within the EPPE system.

Table 1: Acronyms

Acronym	Definition
CMS	Centers for Medicare and Medicaid Services
COR	CMS Contact (COR)
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

844-EPPE-DUA (844-377-3382)

eppe@cms.hhs.gov