Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - Change Contact Request

Version 2.0

01/22/2024

Document Number: EPPE-207-CONT_DUAReq_ChangeContact-v2.0

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1.   Overview

This training guide will cover the following:

- How to perform Assign to a Different Requester Change Contact Requests for Contractor (CONT) DUAs
- How to perform Request this DUA Change Contact Request

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.

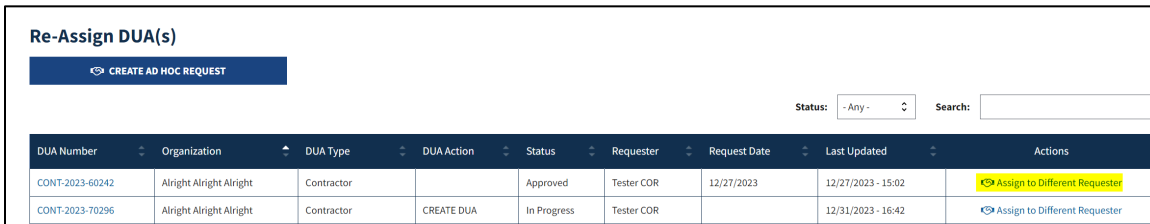# 2.   Change Contact Requests: Assign to Different Requester

The Requester can request or assign DUAs within their organization through the "Change Contact" process.

Figure 1: Welcome Screen


1. Click **Re-Assign DUAs** from the top navigation menu.

Figure 2: Chage Contact: Assign to a Different Requester

DUA Number	Organization	DUA Type	DUA Action	Status	Requester	Request Date	Last Updated	Actions
CONT-2023-60242	Alright Alright Alright	Contractor		Approved	Tester COR	12/27/2023	12/27/2023 - 15:02	Assign to Different Requester
CONT-2023-70296	Alright Alright Alright	Contractor	CREATE DUA	In Progress	Tester COR		12/31/2023 - 16:42	Assign to Different Requester

1. Click the **Assign to Different Requester** action hyperlink.

The Assign to another User pop-out window is displayed.

Figure 3: Change Contact: Assign to another User Pop-Out Window
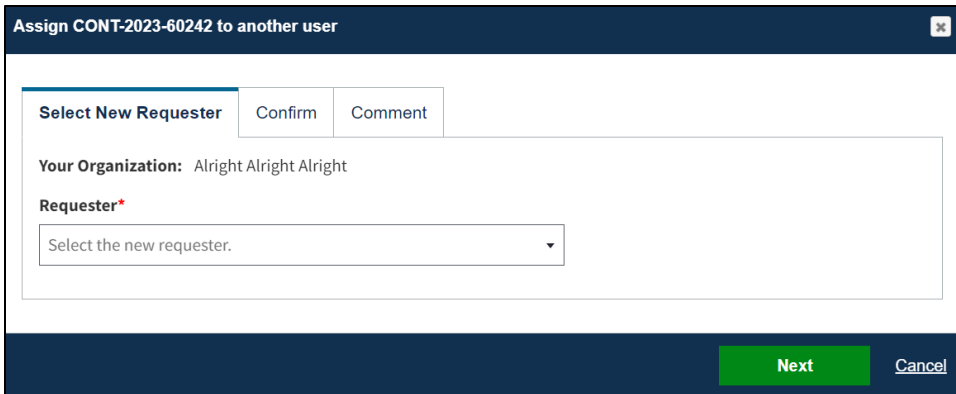
2. Select the **Requester** from the drop-down menu.
3. Click **Next.**

Figure 4: Change Contact: Confirm New Requester

2. Confirm the **Current Requester's** information.
3. Confirm the **Reassigned Requester's** information.
4. Click **Next.**

Figure 5: Change Contact: Add Comments and Submit

5. Add a **Comment** if applicable.
6. Click **Submit.**

Figure 6: Change Contact: Assign another User Confirmation

7. Confirmation Message is displayed.

3.   Change Contact Requests: Request

Figure 7: Welcome Screen

1.   Click **Re-Assign DUAs** from the top navigation menu.

Figure 8: Chage Contact: Request this DUA

2.   Click the **Request this DUA** action hyperlink.

Figure 9: Chage Contact: Confirm Request this DUA Information

3.   Confirm the displayed information.
4.   Click **Next.**

Figure 10: Request this DUA: Upload Documents

5. Click the **Choose File** button to select a document to upload.
6. Add a **Document Description** in the open text file.
7. Click the **Add Document** button to ensure its added to the request.
8. Click **Next.**

Figure 11: Request this DUA: Add Comments and Submit

9. Add a **Comment** if applicable.
10. Click **Submit.**

Figure 12: Request this DUA: Confirmation Message
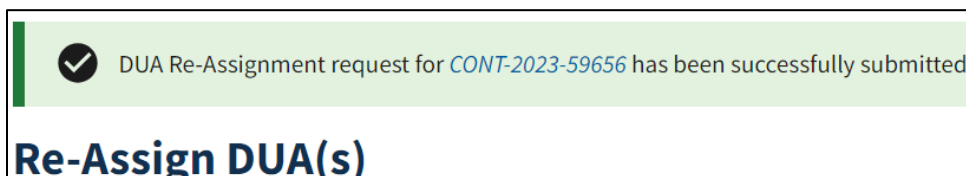
4.   Acronyms

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

5.   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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