



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

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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

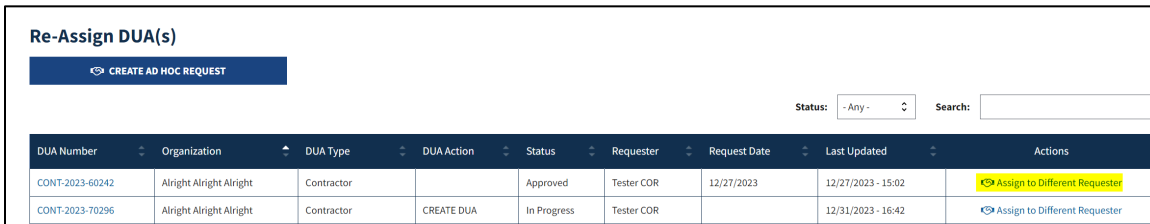
The Requester can request or assign DUAs within their organization through the “Change Contact” process.

Figure 1: Welcome Screen



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

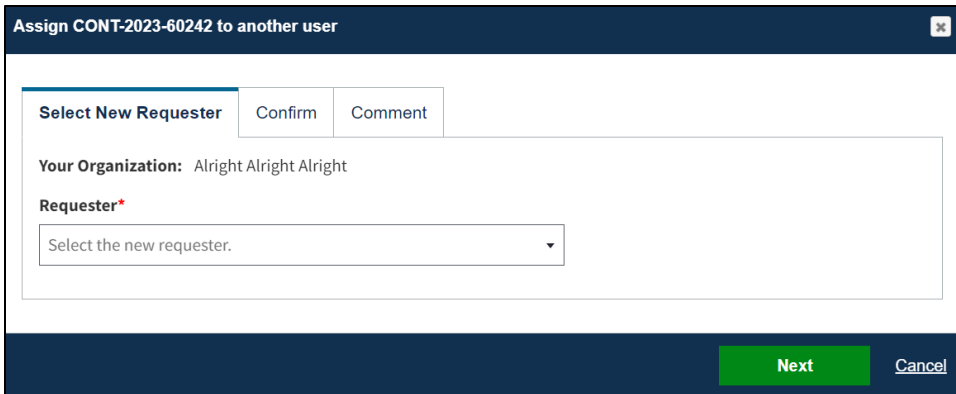
Figure 2: Chage Contact: Assign to a Different Requester



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

Assign CONT-2023-60242 to another user

Select New Requester **Confirm** Comment

Current Requester: Tester COR
 Current Requester's Email: testercor07@gmail.com
 Current Requester's Phone Number: 6096652030
 Current Organization Name: Alright Alright Alright
 Reassigned Requester: Tester COR
 Reassigned Requester's Email: testercor07@gmail.com
 Reassigned Requester's Phone Number: 6096652030
 Reassigned Organization Name: Alright Alright Alright

Previous **Next** Cancel

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

Assign CONT-2023-60242 to another user

Select New Requester Confirm **Comment**

Add Comment

A comment is optional.

Content limited to 2000 characters, remaining: 2000

Previous **Submit** Cancel

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

Figure 6: Change Contact: Assign another User Confirmation

✓ DUA Re-Assignment request for [CONT-2023-60242](#) has been successfully submitted.

Re-Assign DUA(s)

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

Re-Assign DUA(s)

CREATE AD HOC REQUEST

Status: Search:

DUA Number	Organization	DUA Type	DUA Action	Status	Requester	Request Date	Last Updated	Actions
CONT-2024-70471	Alright Alright Alright	Contractor	CREATE DUA	Approved	Tester COR	01/10/2024	01/10/2024 - 15:22	Assign to Different Requester
LDSS-2024-70470	Alright Alright Alright	Limited Data Set	CREATE DUA	Approved	Tester COR	01/10/2024	01/10/2024 - 14:35	Assign to Different Requester
CONT-2024-70469	Alright Alright Alright	Contractor	CREATE DUA	Approved	Tester COR	01/10/2024	01/10/2024 - 14:14	Assign to Different Requester
CONT-2024-70454	Test Org	Contractor		Approved	Tester COR	01/09/2024	01/09/2024 - 15:05	Assign to Different Requester
CONT-2024-60293	HCD Organization	Contractor		Approved	Tester User	01/05/2024	01/05/2024 - 15:20	Request this DUA

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

Figure 9: Chage Contact: Confirm Request this DUA Information

Request this DUA: CONT-2023-59656

Confirm | Upload Documents | Comment

i Requesting the re-assignment of this DUA from another requester in your organization will make you the owner of the DUA and allow you full access to the DUA in EPPE.

Current Requester: Tester User
Current Requester's Email: tu89522@gmail.com
Current Requester's Phone Number: 4432394444
Current Organization Name: HCD Organization
Reassigned Requester: Tester COR
Reassigned Requester's Email: testercor07@gmail.com
Reassigned Requester's Phone Number: 6096652030
Reassigned Organization Name: HCD Organization

Next [Cancel](#)

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

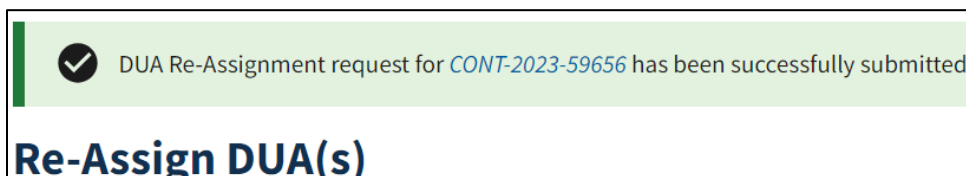
Figure 10: Request this DUA: Upload Documents

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

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

eppe@cms.hhs.gov