

Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module -Ad Hoc Requests

Version 2.0 01/22/2024

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1. Overview

This Training Guide will cover the following:

How to perform Ad Hoc Requests for a Contractor (CONT) DUA

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: <u>https://portal.cms.gov/</u>

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. Ad Hoc Requests

The user can view Ad-Hoc Requests.

Figure 1: EPPE Home



- 1. Log into EPPE.
- 2. Select **RE-ASSIGN DUA(S)** from the top navigation menu.

The Re-Assign DUA(s) screen will be displayed.

Figure	2:	Re-Assign	DUA
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Γ		EPPE Enterprise P	rivacy I	Policy Engine							Logge	ed In As:	DUA Requeste	r		٥	D USER (SUIDES	Тезтсмясо
	*	NEW / RE-USI	DUA	MY DUA(s)	RE-ASSIGN DUA(s)									DUA SEA	RCH:			۹	Advanced Searc
	Re	-Assign I ত cre	OUA(S) HOC REQUEST									Statu	is: Any -	\$	Sear	rch:		
	DU	A Number		Organization	¢ DUA	Туре	e ¢	DUA Action	Status	Requester		Request D	ate 🗘	Last Update	đ			Actions	

3. Click Create Ad Hoc Request button.

The Ad Hoc Request pop-up will be displayed.

Figure 3: Ad Hoc Request: Select

Ad Hoc Cha	inge Contact Request			×							
Select	Upload Documents	Confirm									
Our record For which Select Or Please s	Our records indicate you belong to more than one organization. For which organization do you wish to initiate a Change Contact Request? Select Organization* Please select the organization to re-assign the DUA to.										
DUA nun	ıber										
Digits o	only										
Please er	Please enter the DUA number that you would like to request be transferred.										
			Next	<u>Cancel</u>							

- 4. Select the **Organization** from the **Select Organization** drop-down menu.
- 5. Enter the **DUA** Number.
- 6. Click Next.

Note: If the request belongs to multiple organizations, select organization.

The confirmation message, "DUA Re-Assignment request for <DUA number> has been successfully submitted" is displayed. The request is submitted to the EPPE Admin for approval.

Figure 4: Ad Hoc Request: Upload Documents

Hoc Cha	ange Contact Request				
Select	Upload Documents	Confirm			
Upload o	one or more supporting de	ocuments.*			
Select Fi	ile				
Choose	File No file chosen				
Docume	nt Description				
			 A		
Add I	Document				
			Browlews	Neut	0
			Previous	Next	Can

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

Figure 5: Ad Hoc Request: Confirm Request

Hoc Cha	ange Contact Request			ĺ
Select	Upload Documents	Confirm		
0	Please review the re-ass	signment befor	submitting your request.	
Current	Requester: Tester COR			
Current	Requester's Email: test	ercor07@gmai	om	
Current	Requester's Phone Num	ight Alright Alr	0 at	
Reassig	ned Requester: Tester C	OR	IL .	
Reassig	ned Requester's Email:	testercor07@g	ail.com	
Reassig	ned Requester's Phone M	lumber: 6096	2030	
Reassig	ned Organization Name:	HCD Organiza	on	
5	5	0		

11. Click the **Submit** button.

Figure 6: DUA Re-Assignment Submission Acknowledgement



3. Acronyms

The following are acronyms used within the EPPE system.

Table 1: Acronyms

Acronym	Definition
EPPE	Enterprise Privacy Policy Engine
DUA	Data Use Agreement
CMS	Centers for Medicare and Medicaid Services
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