Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - Requester DUA Search

Version 2.0

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1. Overview

This Training Guide will cover the following:

- How to perform a DUA Search as a Contractor DUA Requester.
- Potential File Action Messages.

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

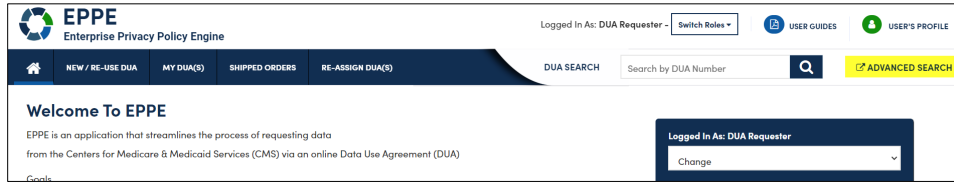 A red asterisk denotes that a field is required to be entered.

 The question mark icon, when selected, will display field specific help.

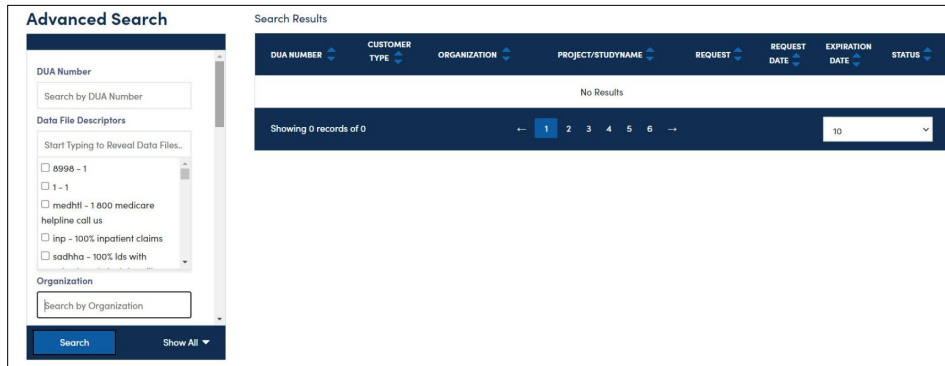## 2. DUA Search

Log in to the EPPE application.

Figure 1: EPPE Welcome Screen

1. Enter the last 5 digits of a DUA Number in the **DUA Search** field to search for a specific DUA.
2. Click **ADVANCED SEARCH**.

The **Advanced Search** screen will be displayed.
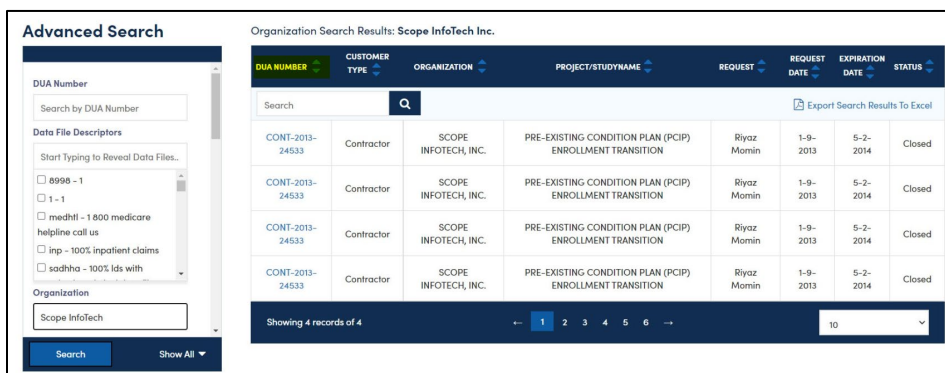
Figure 2: Advanced Search

3. Enter the Search Criteria using the **Advanced Search** features/filters on the far left.
4. Click **Search**.

Note: The **Search** button initiates the search function.

The **Search Results** are displayed within the table in the center of the screen with the search criteria still displayed to the left.
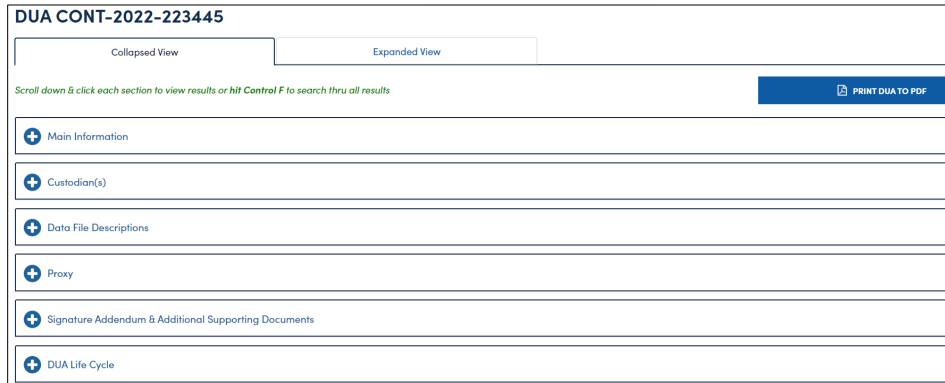
Figure 3: DUA Search Results

5. Click the specific DUA Number from the search results (left side within the table) to display the details of a single DUA.

The details screen will be displayed.

Figure 4: DUA Details

6. Click **PRINT DUA TO PDF** to access printing options.
7. Click the plus sign (+) icon associated with the topic to expand a section and view:
   a. **DUA Life Cycle**
   b. **Data File Description**
8. Use the back button on your browser to return to the DUA search results screen.

Figure 5: Search Results Redisplayed

The DUA search results will be redisplayed with the search criteria.

9. Click the *Export Search Result to Excel* link (top of the table) to generate a report.
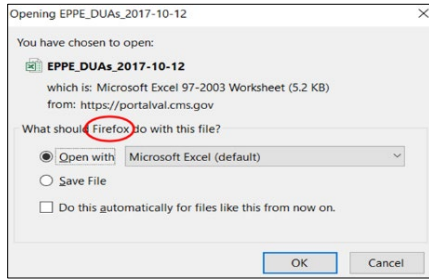
The **DUA Search Results Excel Report** is downloaded and, depending on your browser, will be displayed at the top or bottom of the screen.

10. Click the file to open it.

2.1   Potential File Action Messages

Depending on your internet browser and other settings, messages may display asking if the file should be opened or saved.

Figure 6: Firefox File Action Messages

1. Click the opening or saving action for your browser.

Note: The examples shown are not all-inclusive.

The Excel Report of Exported DUA Search Results will be displayed on the first tab.

Figure 7: Downloaded Report Details

2. Click the second tab of the Excel report.

The second tab of the Excel Report will show the search criteria used.

Figure 8: Downloaded Report Search Criteria

3. 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
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

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