



Centers for Medicare & Medicaid Services  
eXpedited Life Cycle (XLC)

# Enterprise Privacy Policy Engine (EPPE)



**Contractor Approval Workflow Training  
Module - Initial DUA Re-Assignment**



# Training Topics

## Training Topics in This Module

- EPPE Application Prerequisites
- Basic Information About EPPE
- Initial DUA Re-Assignment
- EPPE Help Desk

# EPPE ACCESS PREREQUISITES

# EPPE Access Prerequisites

## CMS Enterprise Portal Access, IDM Credentials, and EPPE Access

- Obtain access to the CMS Enterprise Portal
  - Access CMS Portal
    - <https://portal.cms.gov/>
  - Obtain Identity Management (IDM) Credentials, Multi-Factor Authentication (MFA) and EPPE Access
    - <https://www.cms.gov/files/document/eppeidm.pdf>

# Basic Information About EPPE

## Icons Used Throughout the EPPE System



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

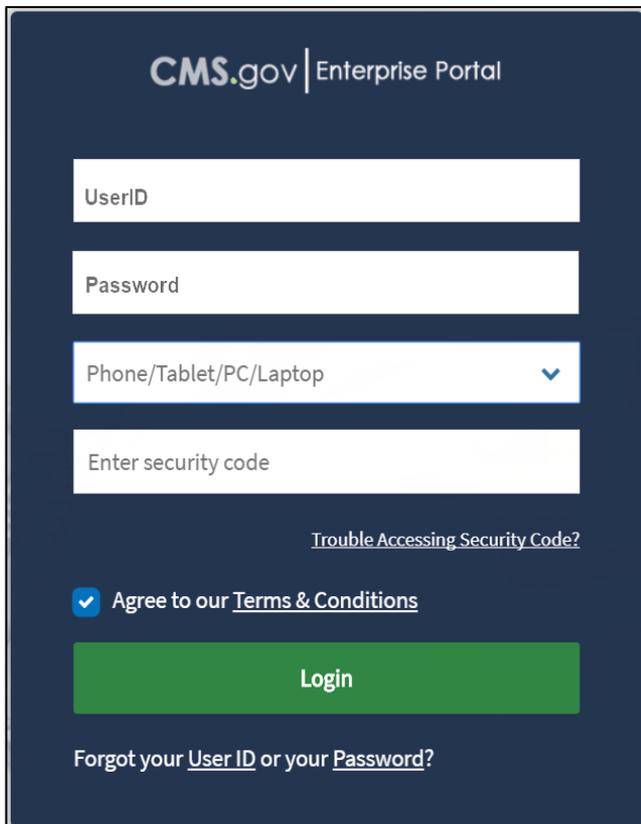


The question mark icon when selected will display field specific help.

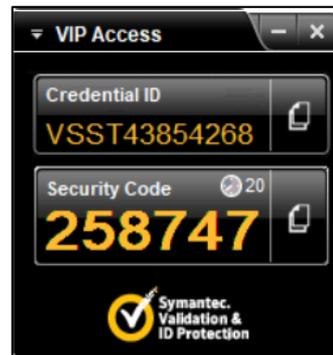
# OBTAINING THE EPPE DUA REQUESTER ROLE

# Obtaining the DUA Requester Role

## Login as an EPPE User



The screenshot shows the CMS.gov Enterprise Portal login interface. It features a dark blue header with the CMS.gov logo and 'Enterprise Portal' text. Below the header are four input fields: 'UserID', 'Password', a device selection dropdown menu (currently showing 'Phone/Tablet/PC/Laptop'), and 'Enter security code'. A link for 'Trouble Accessing Security Code?' is located below the security code field. A checkbox labeled 'Agree to our Terms & Conditions' is checked. A green 'Login' button is positioned below the checkbox. At the bottom, there is a link for 'Forgot your User ID or your Password?'.

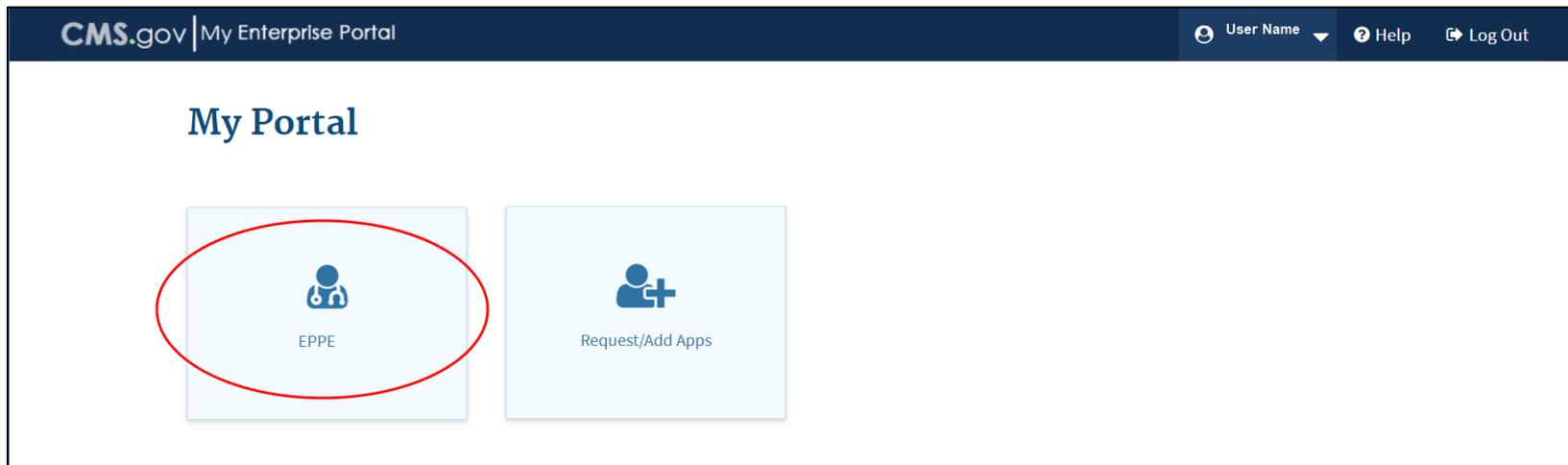


1. Once your **EPPE User Role** access has been approved, access the **CMS Enterprise Portal**.
2. Enter your **User ID**.
3. Enter Your **Password**.
4. Choose the **MFA Device**.
5. Enter the **Security Code** from the **VIP Access Software**.
6. Select the **Agree to our Terms & Conditions** button.
7. Select **Login**.

**Note:** The **MFA Device** selection field and the **Security Code** field display after entering the **User ID** and **MFA Device** respectively.

# Obtaining the DUA Requester Role

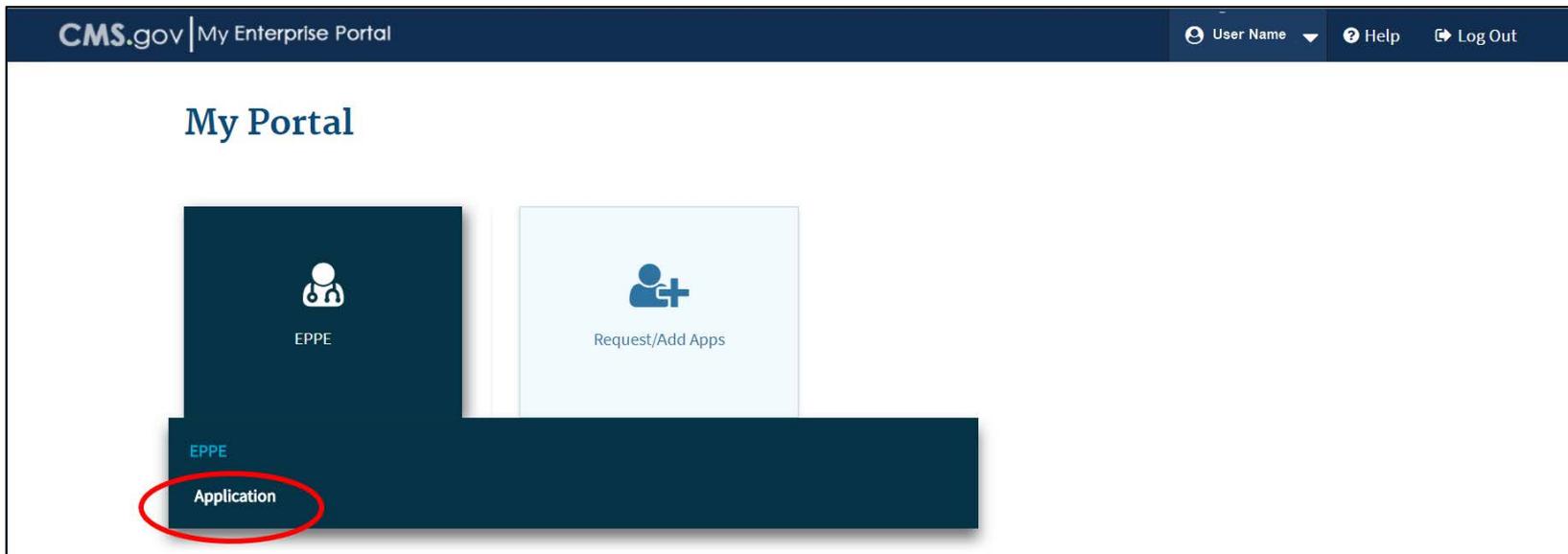
## Request a Role in EPPE



1. The **CMS Enterprise Portal Welcome Screen** displays with the **EPPE** Application tile.
2. Select the **EPPE** Application tile.

# Obtaining the DUA Requester Role

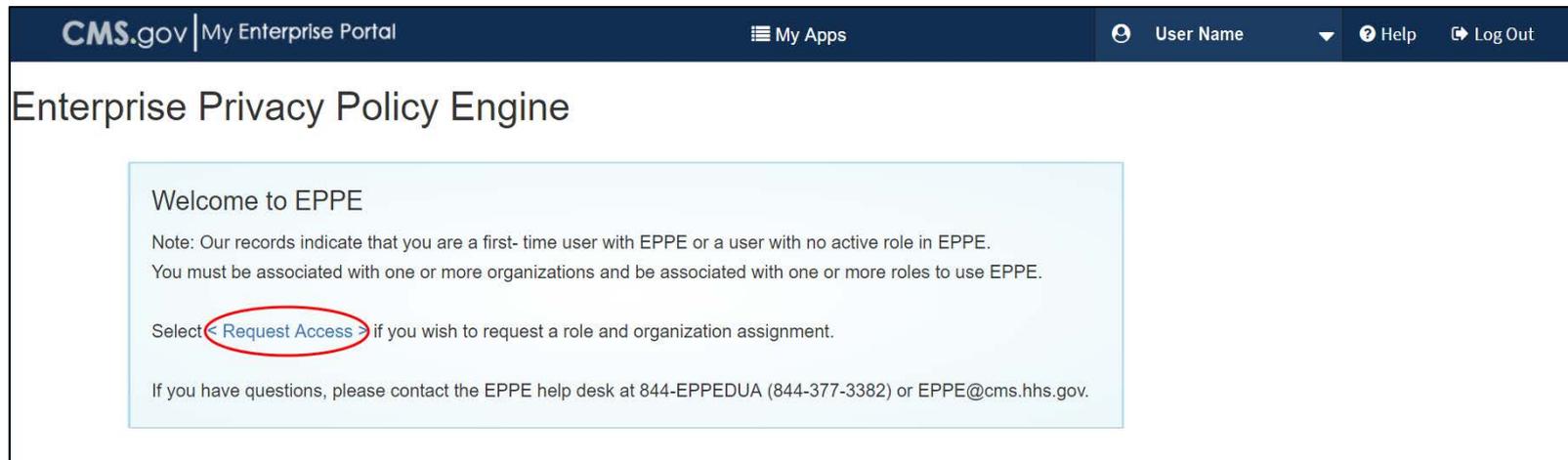
## CMS Portal: Request a Role in EPPE



Select **Application** to access the **EPPE** system.

# Obtaining the DUA Requester Role

## EPPE Welcome Screen



The screenshot shows the EPPE Welcome Screen. At the top, there is a dark blue header with the CMS.gov logo and 'My Enterprise Portal' on the left, 'My Apps' in the center, and 'User Name', 'Help', and 'Log Out' on the right. Below the header, the main content area is white and contains the text 'Enterprise Privacy Policy Engine'. A light blue box contains the following text: 'Welcome to EPPE', 'Note: Our records indicate that you are a first-time user with EPPE or a user with no active role in EPPE. You must be associated with one or more organizations and be associated with one or more roles to use EPPE.', 'Select < Request Access > if you wish to request a role and organization assignment.', and 'If you have questions, please contact the EPPE help desk at 844-EPPEDUA (844-377-3382) or EPPE@cms.hhs.gov.' The text '< Request Access >' is circled in red.

1. The **EPPE Welcome Screen** displays.
2. Select the **Request Access** link to start the role selection process.

# Obtaining the DUA Requester Role

## Request EPPE Role

CMS.gov | My Enterprise Portal My Apps

### Enterprise Privacy Policy Engine

#### REQUEST ROLE IN EPPE

Organization Name \*:  Cannot locate your Organization?

Role \*:

**Add**

#### YOUR SELECTIONS

S.No.	Organization Name	Role	Data Dissemination System	Action
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**Exit**

1. Select your **Organization Name** from the dropdown.
2. Select the **DUA Requester** Role from the dropdown.
3. Select the **Add** button.

# Obtaining the DUA Requester Role

The screenshot shows a web interface for requesting a role in EPPE. The main form is titled "REQUEST ROLE IN EPPE" and contains the following fields:

- Organization Name \***: A text input field containing "FLORIDA A&M UNIVERSITY". To its right is a link: "Cannot locate your Organization?".
- Role \***: A dropdown menu with "DUA REQUESTER" selected.
- Add**: A blue button below the form.

Below the form is a section titled "YOUR SELECTIONS" containing a table:

S.No.	Organization Name	Role	Data Dissemination System
1	FLORIDA A&M UNIVERSITY	DUA REQUESTER	

At the bottom of the form are two buttons: "Submit" and "Exit".

An "ATTESTATION" dialog box is overlaid on the right side of the form. It contains the following text:

**ATTESTATION**

Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the EPPE web page. Link to [EPPE web page](#).

I agree. \*

**NEXT**: A blue button at the bottom right of the dialog box.

1. The Attestation message displays: ***“Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the [EPPE web page](#),”*** including a link to the EPPE page on CMS.gov.
2. Select the **I agree** checkbox.
3. Select the **Next** button.

# Obtaining the DUA Requester Role

CMS.gov | My Enterprise Portal My Apps User Name Help Log Out

## Enterprise Privacy Policy Engine

### REQUEST ROLE IN EPPE

Organization Name \*:  Cannot locate your Organization?

Role \*:

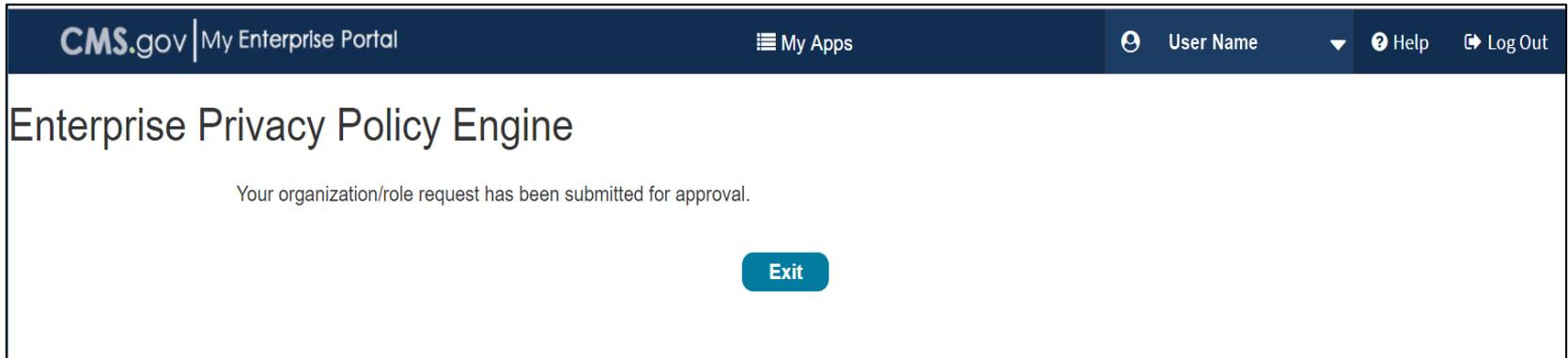
### YOUR SELECTIONS

S.No.	Organization Name	Role	Data Dissemination System	Action
1	FLORIDA A&M UNIVERSITY	DUA REQUESTER		Edit Remove

1. The **Selection** displays in the table.
2. Select the **Submit** button.

# Obtaining the DUA Requester Role

## EPPE Role Request Acknowledgement



The screenshot shows the CMS.gov My Enterprise Portal interface. The header includes the CMS.gov logo, "My Enterprise Portal", a "My Apps" menu, and user options: "User Name", "Help", and "Log Out". The main content area displays the title "Enterprise Privacy Policy Engine" and a message: "Your organization/role request has been submitted for approval." Below the message is a blue "Exit" button.

1. The **EPPE** role request submission acknowledgement displays the message: ***“Your organization/role request has been submitted for approval.”***
2. The EPPE Administration (EPPE Admin) Team will review for approval.
3. Select the **Exit** button.

# DUA Requester – EPPE Login

## EPPE Welcome Screen and Menu

The screenshot shows the CMS.gov My Enterprise Portal interface. The top navigation bar includes the CMS.gov logo, "My Apps", the user name "Stoney Johnson", and links for "Help" and "Log Out". The main heading is "Enterprise Privacy Policy Engine". On the left is a vertical menu with options: EPPE Home, DUA(s), New / Re-Use, Update / Amend, Close, Extend, My DUA(s), Un-Finished, Submitted, Pending Action(s), Approved, Expired, Closed, Denied, and Re-Assign DUA(s). The main content area displays a "Welcome to EPPE" message, stating that EPPE streamlines the process of requesting data from CMS via an online Data Use Agreement (DUA). It lists goals: reducing processing time, transitioning from paper-based to automated processes, and providing a 100% traceable record of disclosures. Training materials are also mentioned, including a Contractor Approval Workflow. The user is logged in as "DUA REQUESTER" and has a "Switch To:" dropdown menu set to "Select an Option". The version number "Version 27.1" is visible in the bottom right corner of the main content area.

The EPPE Welcome Screen displays with the EPPE Menu for the DUA Requester.

# INITIAL DUA RE-ASSIGNMENT

# DUA Re-Assignment – Requester’s Initial Log-in

## EPPE Welcome Screen – DUA Re-Assignment Table

Logged in as: DUA REQUESTER

### Welcome to EPPE

EPPE is an application that streamlines the process of requesting data from the Centers for Medicare & Medicaid Services (CMS) via an online Data Use Agreement (DUA).

Goals:

- Reduce the amount of time to process a DUA.
- Transition from a paper-based to an automated process.
- Provide a 100% traceable record of CMS data disclosures.

Training Materials: Visit the EPPE web page on cms.gov, to download Training Slide Decks for the following:

- Contractor Approval Workflow.

Version 27.1

#### MY REASSIGNED DUA

DUA Number	Organization	Customer Type	Requester	Status	Action
CONT-2018-52672	GEORGETOWN UNIVERSITY - HEALTH POLICY INSTITUTE	Contractor	Charlotte Webb	Approved	<a href="#">View</a>
CONT-2018-52673	GEORGETOWN UNIVERSITY - HEALTH POLICY INSTITUTE	Contractor	Charlotte Webb	Closed	<a href="#">View</a>

Showing 1 to 2 of 2 entries [Previous](#) [Next](#)

#### ACKNOWLEDGEMENT STATEMENT

I accept the above DUA(s)

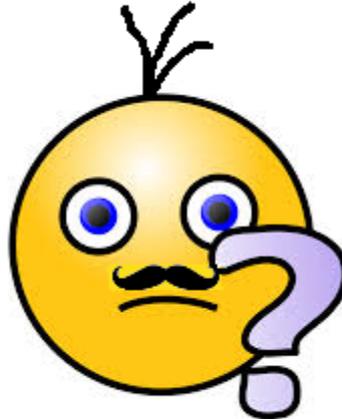
I agree.

[Accept](#)

1. Requester logs into the EPPE system for the first time.
2. A list of DUAs created for that Requester under the data entry role is displayed.
3. Requester selects “I agree” and selects “Accept.”
4. DUAs now move into the Requester respective queues.

**Note:** You will not be able to create, update, extend, or close any DUAs until taking ownership of re-assigned DUAs.

# 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](mailto:eppe@cms.hhs.gov)