



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

Document Number: EPPE-214-CONT_DUAReq_AdHoc-v2.0

Table of Contents

1. Overview	1
1.1 EPPE Access Prerequisites	1
1.2 Icons Used Throughout the EPPE System	1
2. Ad Hoc Requests	2
3. Acronyms	5
4. EPPE Help Desk Information	6

List of Figures

Figure 1: EPPE Home	2
Figure 2: Re-Assign DUA	2
Figure 3: Ad Hoc Request: Select	2
Figure 4: Ad Hoc Request: Upload Documents.....	3
Figure 5: Ad Hoc Request: Confirm Request	3
Figure 6: DUA Re-Assignment Submission Acknowledgement	4

List of Tables

Table 1: Acronyms	5
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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: <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. 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.

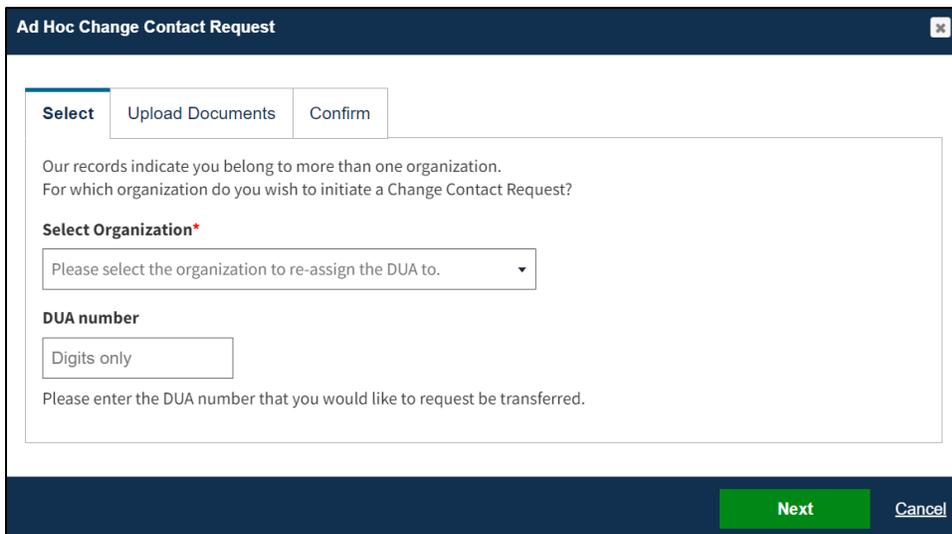
Figure 2: Re-Assign DUA



3. Click **Create Ad Hoc Request** button.

The Ad Hoc Request pop-up will be displayed.

Figure 3: Ad Hoc Request: Select

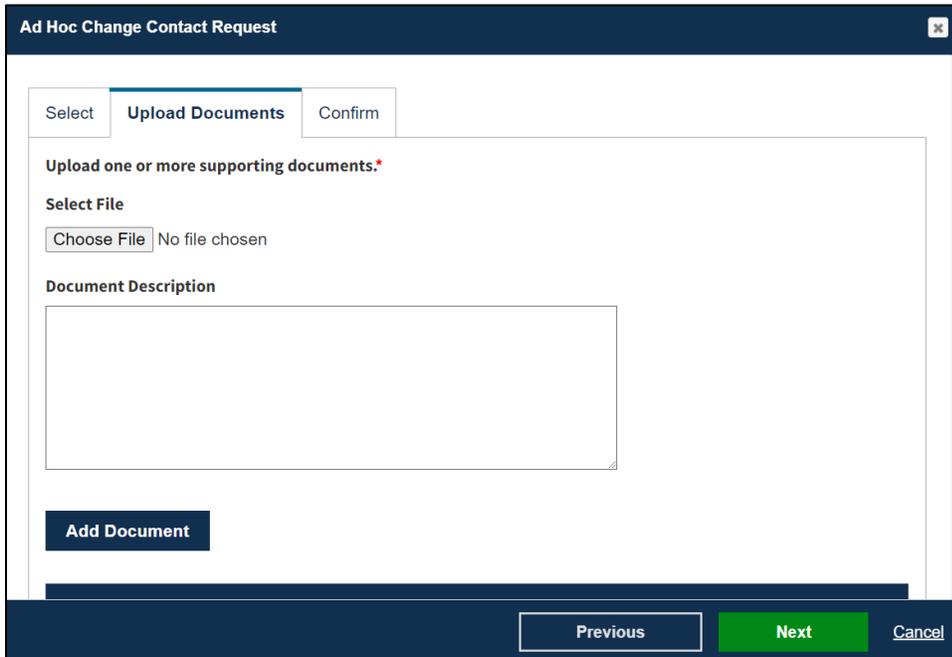


4. Select the **Organization** from the **Select Organization** drop-down menu.
5. Enter the **DUA Number**.
6. Click **Next**.

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

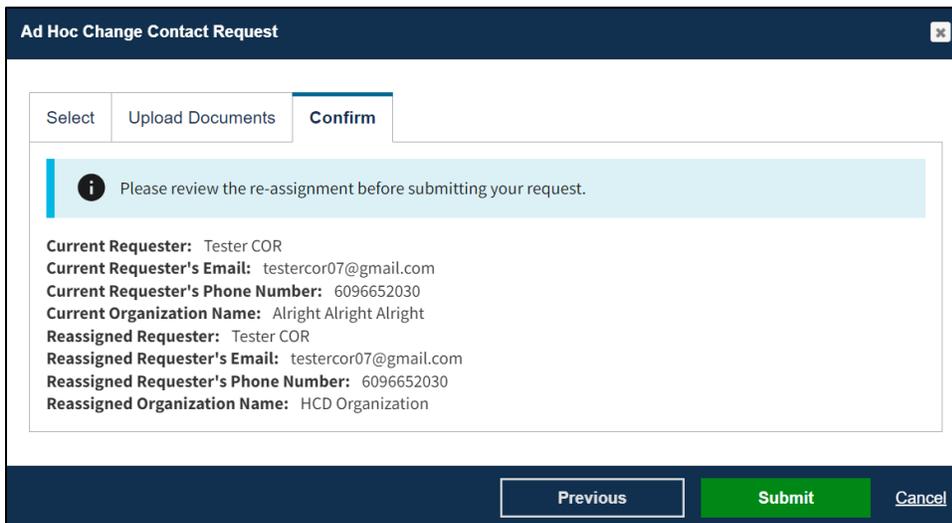
The confirmation message, "DUA Re-Assignment request for <DUA number> has been successfully submitted" is displayed. The request is submitted to the EPPE Admin for approval.

Figure 4: Ad Hoc Request: Upload Documents



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



11. Click the **Submit** button.

Figure 6: DUA Re-Assignment Submission Acknowledgement

 DUA Re-Assignment request for *CONT-2024-70469* has been successfully submitted.

DUA Number: CONT-2024-70466

Collapsed View Expanded View

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)

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