



Centers for Medicare & Medicaid Services

Enterprise Privacy Policy Engine Cloud (EPPE)

Contractor Approval Workflow Training Module - COR Print DUA

Version 2.0

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1. Overview

This training guide will cover the following:

- How to print a DUA from a Pending Actions queue.
- How to format a DUA for printing.
- How to print a DUA from a Re-Assign Request(s) queue.

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.

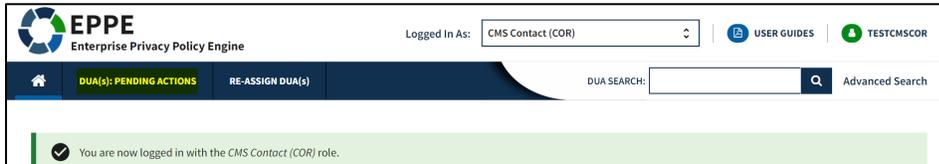


The question mark icon, when selected, will display field specific help.

2. Print From Pending Actions Queue

Log in to the EPPE application.

Figure 1: EPPE Welcome Screen



1. Click **DUA(S) PENDING ACTIONS** to display a list of Submitted DUAs for the CMS Contact (COR) to review.

The **DUA Approvals and Extension Requests** queue displays a list of DUAs pending action.

Figure 2: DUA Approvals & Extensions Requests

DUA Approval & Extension Requests						
		Status: - Any -	Search: <input type="text"/>			
DUA Number	Organization	DUA Action	Requester	Request Date	Workflow Status	Actions
CONT-2023-70175	Test Org	CREATE DUA	Tester COR	12/15/2023	Submitted-Waiting for CMS COR Approval	Review

2. Specify by **Status** criteria (optional) to narrow this list.
3. Select the **Review** action to review and act on a specific DUA.

The Update a DUA Request screen is displayed.

Figure 3: DUA Review



4. Click the **PRINT TO PDF** button at the top of the screen to access printing options.

The **Print to PDF** pop-up appears.

Figure 4: Print DUA to PDF Options



5. Select an option:
 - **Print DUA Review** to print all sections of the DUA except the DUA Life Cycle.
 - **Print DUA Life Cycle** to print the DUA Life Cycle only.
 - **Print All** to print both the DUA Review and DUA Life Cycle.
6. Click the **PRINT to PDF** button.

2.1 DUA Formatted for Printing

The DUA is displayed in HTML format for printing. In this example, **Print DUA Review** was selected. Sections displayed are:

- DUA Number
- Main Information
- CMS Contact (COR)
- COR Proxy
- Contract Information
- Subcontracting Organization
- Documents
- Custodians
- Data File Description
- Pending Data File Description
- Requester Proxy

2.2 Print From Re-Assign DUA(s) Queue

Users can Print from their Re-Assign DUA(s) Queue.

Figure 5: EPPE Welcome Screen: Re-Assign DUA(s)



The Re-Assign DUA(s) queue shows a list of DUAs pending an action.

1. Click **RE-ASSIGN DUA(S)** to display a list of Change Contact Requests for CMS Contact (COR) Review.

Note: The Re-Assign DUA(s) queue shows a list of DUAs pending an action.

Figure 6: Search for a Pending Change Contact

Change Contact Requests Awaiting My Action							
Search							
ID	DUA Number	Current Requester	Current Organization	Re-Assigned Requester	Re-Assigned Organization	Request Date	Actions
11280	CONT-2022-59339	Tester Tester	ABC Organization	Stephanw Nowak	ABC Organization	10/18/2023	Review

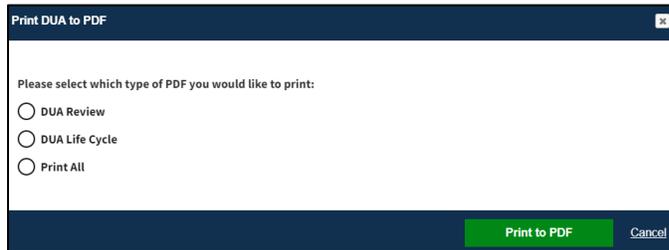
2. Specify **Search** criteria (optional) to narrow the list.
3. Click the **Review** action (far right) to review and take additional actions for each DUA.

Figure 7: How to Print the DUA



4. Click the **PRINT TO PDF** button at the top of the screen to access printing options.

The **Print TO PDF** pop-up is displayed.

Figure 8: Print DUA to PDF Options

Print DUA to PDF

Please select which type of PDF you would like to print:

DUA Review

DUA Life Cycle

Print All

Print to PDF Cancel

5. Select an option:
 - **Print DUA Review** to print all sections of the DUA except the DUA Life Cycle.
 - **Print DUA Life Cycle** to print the DUA Life Cycle only.
 - **Print All** to print both the DUA Review and DUA Life Cycle.
6. Click the PRINT to PDF button.

If the **Print DUA Review** was selected, the sections displayed are:

- DUA Number
- Main Information
- CMS Contact (COR)
- COR Proxy
- Contract Information
- Subcontracting Organization
- Documents
- Custodians
- Data File Description
- Pending Data File Description
- Requester Proxy

3. Acronyms

The following are acronyms used within the EPPE system.

Table 1: Acronyms

Acronym	Definition
CMS	Centers for Medicare and Medicaid Services
COR	CMS Contact (COR)
DUA	Data Use Agreement
EPPE	Enterprise Privacy Policy Engine
HTML	Hypertext Markup Language
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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