Best Practices - PA Gatekeepers

Hello HRST Gatekeepers!

The Gatekeeping facility we employ to manage HRST account activation and removal requests serves to both standardize the account management process and, more importantly, to keep the data within the application secured and visible only to people who are qualified to see it. Your job as a Gatekeeper is an important one because you stand at the gate, making the ultimate decision on which users can and cannot have access to the HRST.

We've put together the following Best Practice guide on how to follow the Gatekeeping process to submit compliant account activation and removal requests. The process is quick and simple. Following it, as laid out below, will reduce any extra confusion caused by incomplete requests.

Workflow Overview

1. Receive

a. Provider agencies/Users should email you, the Gatekeeper, directly for all new user account requests, updates to existing user accounts or user account removals.

*i. **If a Provider or User contacts HRS Support directly regarding user account activation or removal, they will be deferred to their appropriate Gatekeepers***

2. Review

a. If the Provider/User has submitted a User Data Template spreadsheet to you, please review this spreadsheet for accuracy before forwarding it to HRS Support. HRS operates on the fact that you, as the Gatekeeper, have verified that all submitted User Data is accurate.

b. If the Provider/User has given you a list of names, please accurately fill out the User Data Template with this information and review your work for accuracy. (We encourage you to require Providers to fill out their own User Data Template spreadsheets so that you don't have to complete this for them)

3. Submit

c. Only after thoroughly reviewing the User Data Template spreadsheet, forward the spreadsheet to pasupport@replacingrisk.com for processing. In the body of your email please include the following information for each agency spreadsheet being submitted:

i. (MPI Number)
ii. Provider Agencies Legal Business Name
iii. Request Type

For example,

(103221438) Happy Homes, LLC. - New User Request/Additions
(100000999) PersonFirst Services - User Updates
(100001350) HHomes - User Removal

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Important Note: **To promote the safeguarding of a person's PHI, if the workflow detailed above is not followed or if the submitted User Data Template has errors, the request will be rejected and sent back for reprocessing.**

The most important part of this process, and the easiest spot to make a mistake, is with filling out and reviewing the User Data Template spreadsheet.

Below you'll find an in-depth guide on handling the User Data Template spreadsheet:

Reviewing User Data Templates Before Submitting to HRS Support

1. **Ensure a Provider is selected**

2. **Ensure the Required fields are filled out**

3. **Check for typos/data issues**

4. **Ensure Roles are specified**

5. **Ensure the data is ACCURATE**

6. **Submit the User Data Template to HRS Support by forwarding it to pasupport@replacingrisk.com for processing.**

   In the body of your email please include the following information for each agency spreadsheet being submitted:

   i. (MPI Number)
   ii. Provider Agencies Legal Business Name
   iii. Request Type

   For example,
   (103221438) Happy Homes, LLC. - New User Request/Additions
   (100000999) PersonFirst Services - User