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# SIM PCMH Dashboard Account Maintenance

## ► REFERENCE GUIDE

Revision History			
Version	Date of Release	Summary of Changes	Owner
1.0	9/21/2017	Initial document	Kendra Mallon

## Introduction

Michigan Data Collaborative (MDC) is a non-profit organization housed at Michigan Medicine. We created the SIM PCMH Dashboard to provide quality and utilization measures and reports for approved participants of the State Innovation Model (SIM) Patient Centered Medical Home (PCMH) Initiative.

To access the Dashboard, account users must be approved for and receive a Michigan Medicine account. This guide provides information to help Acknowledgers manage the account process for their organization.

## Users and Acknowledgers

An **Account User** refers to a member of a practice or managing organization who has access to the SIM PCMH Dashboard.

Each Managing Organization has an **Acknowledger**, who is in charge of approving user account requests and managing user accounts for their organization.

## Acknowledger Requirements

Because idle and unauthorized logon IDs that provide access to ePHI pose a serious risk to the confidentiality of patient information and the security of our electronic systems, MDC requires the following:

- All account requests must be sent to MDC by an Acknowledger.
- Verification of user accounts for each organization is required **every two months**. If verification is not received within the requested timeframe, the user accounts for that organization are deactivated.
- Acknowledgers are responsible for notifying MDC when staff changes occur that require changes to user accounts, including deactivation.

## Managing User Accounts

Acknowledgers should follow the procedures in this section to request user accounts, confirm existing user accounts, and delete user accounts.

### Requesting a User Account

All SIM PCMH Dashboard user account requests are submitted by each organization's Acknowledger.

**NOTE:** If you would like to request an account but do not know the name of your organization's Acknowledger, contact MDC at [MDC-Accounts@med.umich.edu](mailto:MDC-Accounts@med.umich.edu), and we can forward this information to you.

### Account Request Process

1. The Acknowledger for an organization fills out the appropriate account request template with the potential user's information:

- **Managing Organization Users:** [MO User Account Request Template](#)
- **Practice Users:** [PU User Account Request Template](#)

**NOTE:** You are required to supply adequate identity data so the Michigan Medicine system can confidentially search against other identities in the system. This search ensures unique entries for individuals and prevents duplication. In order to create unique entries, you are required to supply the user's Name (first and last), Title, Organization Name, Date of Birth, Gender, Phone Number, and Email Address.

2. Email the form to MDC at [MDC-Accounts@med.umich.edu](mailto:MDC-Accounts@med.umich.edu).

3. MDC sends an email notification to both the user and Acknowledger when the account is activated. This process may take up to 5-10 business days.

### Confirming Existing User Accounts

Every two months, MDC contacts all Acknowledgers to have them re-verify open accounts for their organization. This confirmation process is put in place to ensure only authorized users receive continued access to the SIM PCMH data.

### User Account Confirmation Process

1. MDC sends an email to each Acknowledger listing all active and open user accounts within that Acknowledger's organization. The email requests verification for all accounts listed.

2. The Acknowledger must reply to the email (within 5 business days) verifying that each account listed is either active or should be deactivated.

3. MDC updates the user account status based on the response of the Acknowledger.

**IMPORTANT:** If an Acknowledger does not respond to the verification email within 5 business days, all user accounts listed within that organization are deactivated.

4. Users are notified via email if their account is deactivated.

## Deleting a User Account

If a user leaves your organization or no longer needs access to the Dashboard, Acknowledgers should notify MDC as soon as possible.

### Account Deletion Process

1. Send an email to [MDC-Accounts@med.umich.edu](mailto:MDC-Accounts@med.umich.edu) with the following information:

**Email Subject:** Request to Remove an MDC Account

**Email Body:**

Please remove the MDC account for the following user:

UM User Name:

Last Name:

First Name

Effective Date:

Reason for account removal:

2. After the request is received and processed, an MDC representative will send confirmation emails to the Acknowledger and to the user.

## Getting Help

### Account Assistance

If you have any general questions about user accounts for the SIM PCMH Project Site, contact the MDC Accounts Team at [MDC-Accounts@med.umich.edu](mailto:MDC-Accounts@med.umich.edu).

### Password Assistance

If you need password assistance, see the instructions on the [SIM PCMH Passwords page](#) of the MDC Website or contact the Health Information Technology and Services (HITS) Service Desk at 734-936-8000.

### Access Assistance

You can find the following access documentation on the SIM PCMH Support page of the MDC website:

[Accessing the SIM PCMH Dashboard](#)

[Installing Duo to Use Two-Factor Authentication](#)