

# Database Security Application

## DATABASE SECURITY APPLICATION (DSA) APPROVER TRAINING MANUAL



State of Michigan  
Department of Health and Human Services

*Last Updated: August 2020*

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# 1 Introduction

## 1.1 About the DSA

The Database Security Application (DSA) allows users to securely request access to Michigan Department of Health and Human Services (MDHHS) applications [e.g., CareConnect360, Data Warehouse, Community Health Automated Medicaid Processing System (CHAMPS)]. All application access requests progress through a review and approval cycle\* (*Figure 1.1.1*), with each phase and outcome tracked within the DSA.

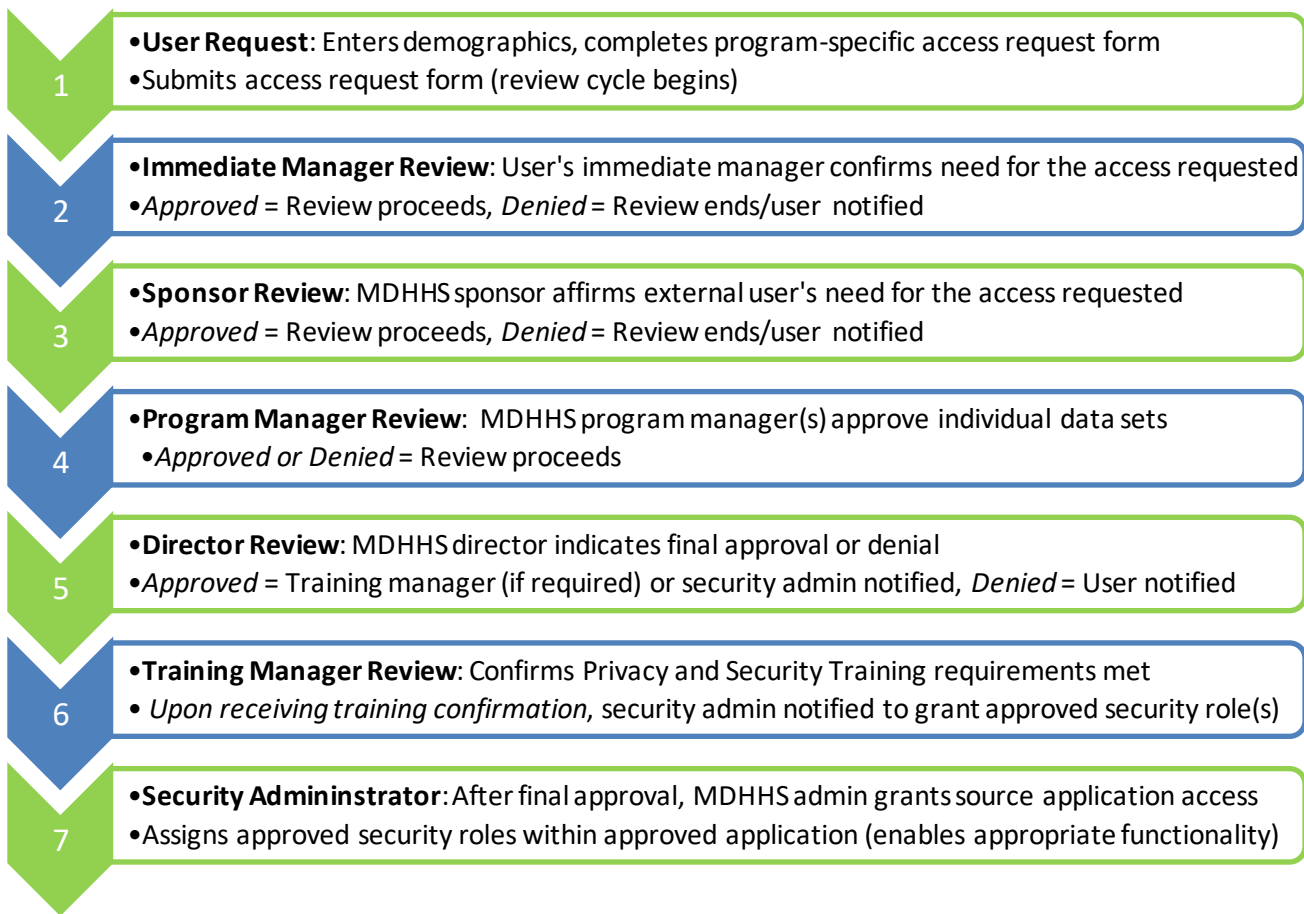


Figure 1.1.1.1: MDHHS Application Access Request – General DSA Review and Approval Cycle

\* Not all access requests require all review levels, and some applications use different terminology for their review levels.

An application access request automatically advances through the workflow as each reviewer records approval or denial. These actions trigger email notifications which are sent to alert the next required reviewer, or inform the user when denied. Users are able to check the status of their request at any point during the process. Access is granted by the Security Admin only after MDHHS final approval.

## 1.2 MDHHS Applications Requested Through the DSA

Users request access to the following MDHHS applications using the DSA access request process.

- Benefits Monitoring Program (BMP)
- Business Objects Community (BOC)
- CareConnect360 (CC360)
- Community Health Automated Medicaid Processing System (CHAMPS)
- Children’s Special Health Care Services (CSHCS)
- CMS Waiver Applications Portal
- Departmental Work Intake Process (DWIP)
- Master Person Index (MPI)
- MDHHS Document Management System (DMS/FileNet)
- MDHHS-Health Data Warehouse (DW)
- Medicaid Statistical Information System (MSIS)
- Michigan Adult Integrated Management System (MiAIMS)
- Michigan Care Improvement Registry (MCIR)
- Michigan Statewide Automated Child Welfare Information System (MiSACWIS)
- Pharmacy Cross-Reference Application (XDR)
- Siebel CRM
- Waiver Support Application (WSA)

## 1.3 Access Approval Levels

Approvers are responsible for reviewing user-submitted requests for access to the MDHHS applications identified in [1.2 MDHHS Applications Requested Through the DSA](#). All approvers should have at least one backup approver assigned for each approval level for which they are responsible. Please reference [7.3 Assign Backup Approvers](#) and [7.4 Review Backup Approver Assignments](#) for details.

*Note:* While the basic steps remain the same, some MDHHS applications use different titles for the access approval levels listed below. For example, MiSACWIS approvers are known as Authorized Requestors, Secondary Approvers, Local Office Security Coordinators, Application Security, Exception Reviewers, and Exception Managers.

### Immediate Manager

The Immediate Manager works closely with the user requesting access to the MDHHS application, and understands the user's business needs. The Immediate Manager begins the review process by affirming that the user requires access to the requested MDHHS application to complete their job duties.

### MDHHS Sponsor

The MDHHS Sponsor works closely with external (non-MDHHS) organizations, and understands the organization's access needs. For these organizations, the MDHHS Sponsor continues the review process by confirming the external user's need for access to the requested MDHHS application.

### Program Manager

Individual data sets within an MDHHS application may be approved by different Program Managers (in the DSA known as Data Managers, Profile Managers, Program Managers, Report Managers, Role Managers, etc.). Each Program Manager abides by mandated criteria for allowing users access to specific data, and approves or denies access accordingly.

### Director

The Director reviews all previous determinations made during the approval cycle, and indicates final approval or denial as appropriate. Upon approval, the request advances to the Training Manager step (if required) -or- the Security Administrator receives notification to finalize the request.

## Training Manager

For applications containing Protected Health Information (PHI), the Training Manager step exists to confirm each user has completed required Privacy and Security Training before any approved security role(s) can be granted. Generally, this check is completed automatically during overnight batch processing. Occasionally the Training Manager needs to take manual action. Once training confirmation is received, the Security Administrator receives notification to finalize the request.

## Security Administrator

The Security Administrator performs the final step to complete the access request. The Security Administrator does not make any access decisions, but rather, grants the already-approved access in the source application. First, the Security Administrator assigns the user's approved security role(s) within the source application. Then, the Security Administrator returns to the DSA and marks the user's access request as 'Complete', at which point the user is notified that their access has been granted.

# 1.4 Accessing the DSA

All users access the DSA through MILogin, the SOM single sign-on portal. MILogin is accessed one of two ways:

- ★ MDHHS users/contractors with a michigan.gov email use <https://miloginworker.michigan.gov>
- ★ All others use <https://milogintp.michigan.gov>

Complete the following steps to access the DSA:

1. Log into MILogin. The MILogin Home page displays (*Figure 1.4.1*).
2. Click **Database Security Application (DSA)**. The DSA Terms & Conditions display.

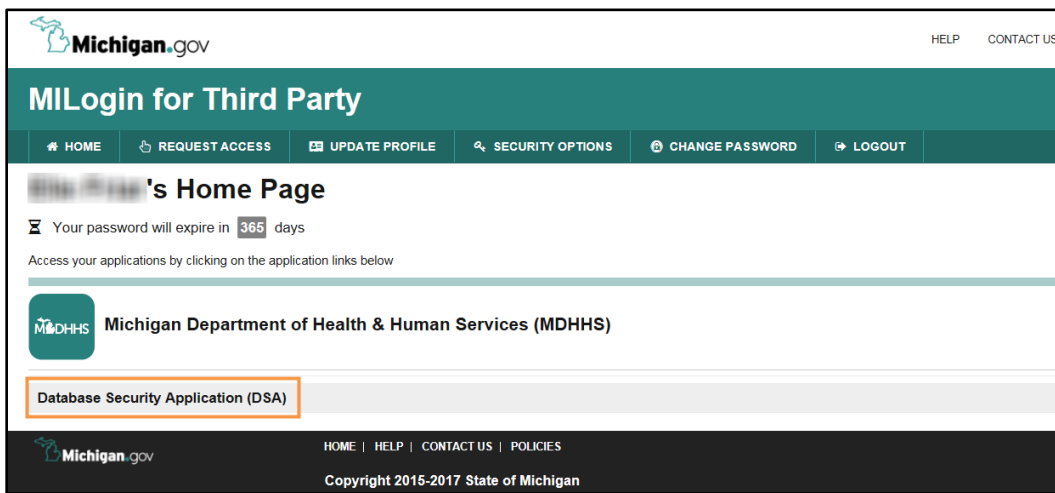


Figure 1.4.1: MILogin Home

3. Review the DSA Terms & Conditions and click **Acknowledge/Agree** (*Figure 1.4.2*). The Home page displays (*Figure 1.4.3, next page*).

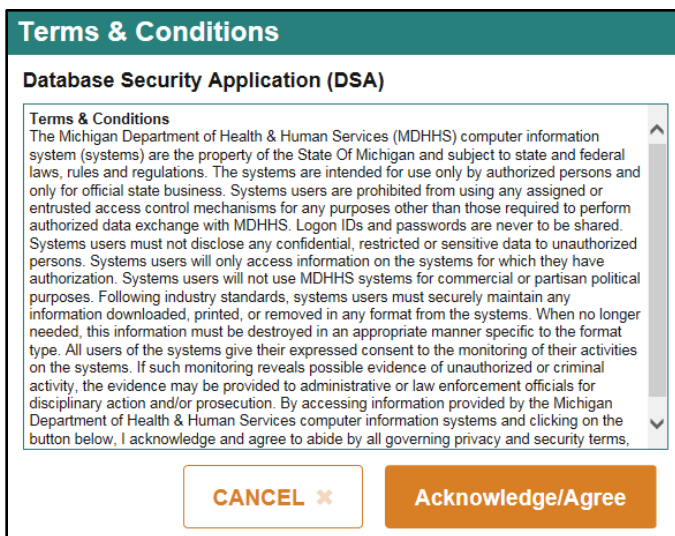


Figure 1.4.2: DSA Terms & Conditions





Figure 1.4.3: Home

## 1.5 Mozilla Firefox Warning

**ATTENTION** Mozilla Firefox users: To ensure optimal DSA performance, complete the following.

1. Access Mozilla Firefox.
2. In the address bar, enter **about:config**.
3. Press the keyboard **Enter** key.

*Note:* A “This might void your warranty!” message may display. Click **I’ll be careful, I promise!** to continue.

4. Locate **dom.allow\_scripts\_to\_close\_windows** in the *Preference Name* list.

*Note:* Enter “dom.allow” in the *Search* field to easily locate.

5. Double-click the **dom.allow\_scripts\_to\_close\_windows** line to update the *Value* to ‘true’; the default *Value* is ‘false’.

*Note:* The use of Internet Explorer is highly recommended for accessing the DSA; even after performing the above steps, some application links may not work with Mozilla Firefox.

## 2 Understanding DSA Functionality

### 2.1 Main Menu

All navigation begins in the DSA main menu. Selecting a main menu item such as **Demographics** navigates directly to the Demographics page. A main menu item containing a right-facing arrow (e.g., **Review**) contains multiple sub-menu options; to display the sub-menu options, hover your cursor over the main menu item (*Figure 2.1.1*).



Figure 2.1.1: DSA Main Menu example

Main Menu Option	Function
Home	Returns the user to the DSA Home page
Demographics	Allows the user to enter organization and contact information
Request ▶	Provides access to application access request forms, the immediate manager role and organization manager role request forms, and My Backup Users where approvers set up their backup approvers
Review ▶	Accesses the approver’s list of requests awaiting review, list of completed reviews, and if applicable, the approver’s list of backup users to review
Manager ▶	Provides access to the options used to approve the immediate manager or organization manager role
Training ▶	Provides access to the most current DSA training materials such as step-by-step videos, job aids, frequently asked questions, and training manuals
Contact Email ▶	Provides a means for users to contact the administrator of each application requested through the DSA
Exit	Logs the user out of the DSA

Table 2.1.1: Main Menu Options

## 2.2 Common DSA Functions

The DSA displays confirmation messages in green text when system actions are successfully performed. In contrast, error messages display in red text. In addition, the following common functions are found throughout the access review and approval process.

Common DSA Function	Purpose
<a href="#">Cancel</a>	Navigates away from the current page without performing any action
<a href="#">Cancel-Return-Request-List</a>	Returns the approver to the Reviewer Request List page without performing any action
<a href="#">Help</a>	Accesses a window containing information explaining the page fields and functionality
<a href="#">Return-Some</a>	During a review, allows the Director to return part(s) of the access request to the Program Manager(s) for additional consideration
<a href="#">Save-Goto-List</a>	Saves a review determination and returns to the Reviewer Request List page
<a href="#">Save-Goto-Next</a>	Saves a review determination and automatically advances to/opens the next access request on the Reviewer Request List page
<a href="#">Video Help</a>	Accesses a video containing step-by-step instructions for reviewing the current access request form

Table 2.2.1: Common DSA Review/Approval Functions

## 2.3 DSA Email Notifications

### Application Access Request

Throughout the access request review and approval cycle, email notifications are automatically generated and sent to the user and/or approver. In addition to providing important details, each email notification directs the recipient to access the DSA to check the request status or to take action.

Access Request Email Notification	Email Recipient
<b>Request Submitted:</b> Confirmation the application access request was submitted	User requesting access
<b>Reviewer Notified:</b> Alert informing the approver that an access request is awaiting their review  <i>Note:</i> The recipient is automatically determined according to the most recent step completed in the review cycle (see <a href="#">Figure 1.1.1</a> )	Immediate Manager, MDHHS Sponsor, Program Manager, Director, or Security Administrator
<b>Request Approved:</b> Notification that the access request was approved	User requesting access
<b>Request Denied:</b> Notification that the access request was denied	User requesting access

Table 2.3.1: Email Notifications – Application Access Request

### Immediate Manager Request

Users request the Immediate Manager role using the DSA. Upon submitting the request, email notifications are automatically generated and sent to the user and/or approver.

Immediate Manager Request Email Notification	Email Recipient
<b>Request Submitted:</b> Confirmation the Immediate Manager role request was submitted	User requesting Immediate Manager role
<b>Reviewer Notified:</b> Alert informing the Organization Manager that an Immediate Manager role request is awaiting their review	Organization Manager
<b>Request Approved:</b> Notification that the Immediate Manager role request was approved/granted	User requesting Immediate Manager role
<b>Request Denied:</b> Notification that the Immediate Manager role request was denied	User requesting Immediate Manager role

Table 2.3.2: Email Notifications – Immediate Manager Request

## Organization Manager Request

Users request the Organization Manager role using the DSA. Upon submitting the request, email notifications are automatically generated and sent to the user and/or approver.

Organization Manager Request Email Notification	Email Recipient
<b>Request Submitted:</b> Confirmation the Organization Manager role request was submitted	User requesting Organization Manager role
<b>Reviewer Notified:</b> Alert informing the organization’s MDHHS Sponsor that an Organization Manager role request is awaiting their review	MDHHS Sponsor
<b>Request Approved:</b> Notification that the Organization Manager role request was approved/granted	User requesting Organization Manager role
<b>Request Denied:</b> Notification that the Organization Manager role request was denied	User requesting Organization Manager role

Table 2.3.3: Email Notifications – Organization Manager Request

## 3 Reviewing Application Access Requests

Steps outlining the general review process for all access approvers are included in this training manual. Application-specific review instructions are included in the training videos referenced below. A general review and approval cycle begins with the Immediate Manager Review, progresses through the MDHHS Sponsor Review (for external, non-MDHHS organizations), the Program Manager Review, and finally the Director Review.

Upon Director (final) approval, certain access requests advance to the Training Manager step to confirm Privacy and Security Training requirements have been met. Otherwise, the Security Administrator is notified to finalize the access request.

*Note: The Immediate Manager Review steps are the same for all access requests. Please reference [3.1 Immediate Manager Review](#) and the **Completing an Immediate Manager or Authorized Requestor Review** video for additional information.*

*The Security Administrator finalization steps are also the same for all access requests. Please reference 4 Finalizing the Access Request: Security Admin and the **Completing the Access Request – Security Administrator** video for additional information.*

*The remaining review levels and instructions differ for each application. Please reference the access request form-specific review steps in the training videos.*

All training videos and transcripts are located in the **Training** menu under **Training View**. Select a **Form** from the list to access training materials for that specific access request form. Select ‘\*\*General DSA’ in the **Form** list to locate the Immediate Manager/Authorized Requestor and Security Administrator training videos and transcripts.

**Please reference the following training videos for application-specific access request review instructions:**

- **Reviewing the BMP Access Request** – Approver & Director versions
- **Reviewing the BOC Access Request** – Approver & Director versions
- **Reviewing the CC360 Access Request** – Approver & Director versions
- **Reviewing the CHAMPS Access Request** – Approver & Director versions
- **Reviewing the CMS Access Request** – one version for ALL reviewers
- **Reviewing the CRM Access Request** – Approver & Director versions
- **Reviewing the CSHCS Access Request** – Approver & Director versions
- **Reviewing the DMS Access Request** – Approver & Director versions

- **Reviewing the DW Access Request** – Approver & Director versions
- **Reviewing the DWIP Access Request** – Approver & Director versions
- **Reviewing the MCIR Access Request** – Approver & Director versions
- **Reviewing the MiAIMS Access Request** – Immediate Manager & Sponsor versions
- **Reviewing the MiSACWIS Access Request** – Secondary Approver, LOSC, Application Security, Exception Reviewer, & Exception Manager versions
- **Reviewing the MPI Access Request** – Approver & Director versions
- **Reviewing the MSIS Access Request** – one version for ALL reviewers
- **Reviewing the WSA-AUT Access Request** – Approver & Director versions
- **Reviewing the WSA-B3W Access Request** – Approver & Director versions
- **Reviewing the WSA-CWP Access Request** – Approver & Director versions
- **Reviewing the WSA-HAB Access Request** – Approver & Director versions
- **Reviewing the WSA-HHB Access Request** – Approver & Director versions
- **Reviewing the WSA-ICO Access Request** – Approver & Director versions
- **Reviewing the WSA-MIC Access Request** – Approver & Director versions
- **Reviewing the WSA-SED Access Request** – Approver & Director versions
- **Reviewing the XDR Access Request** – one version for ALL reviewers

**VIDEO TIPS:** For your convenience, a written transcript accompanies each training video.

In addition all videos have user controls available including pause, stop, rewind, and fast forward. Note that you may need to maximize the video window and/or scroll to see the controls (and to see the [Close](#) link).

Press the ESC (escape) keyboard key or click [Close](#) to exit a video.



### 3.1 Immediate Manager Review

The Immediate Manager (a.k.a. Authorized Requestor) works closely with the user requesting application access, and understands the user’s business needs. The Immediate Manager begins the review process by affirming that the user requires access to the requested MDHHS application to complete their job duties.

Complete the following steps to perform a review as an Immediate Manager:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Review Requests** from the **Review** sub-menu (*Figure 3.1.1*).

-or-

Click Go To Review in the Request Pending Review(s) dashboard.

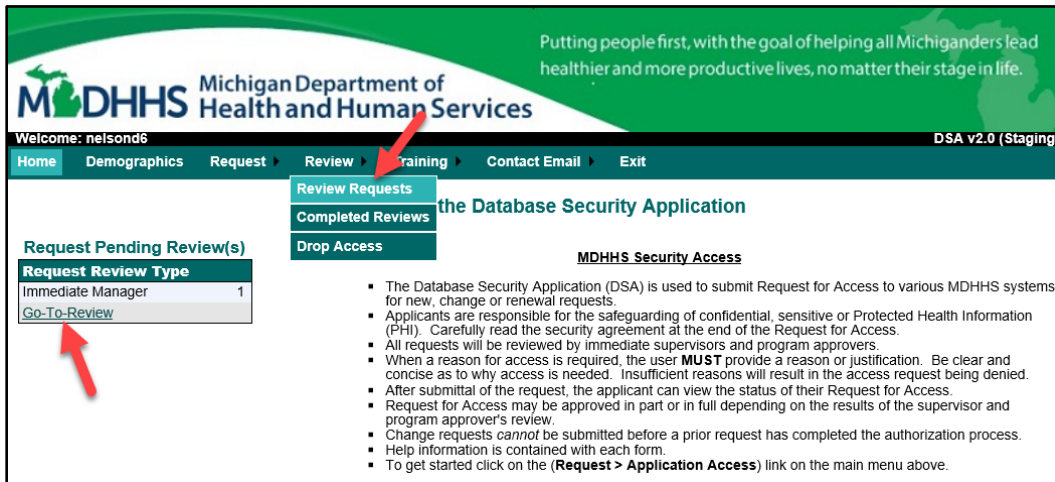


Figure 3.1.1: Home

3. Click Review beside the request to be reviewed (*Figure 3.1.2*). The Immediate Manager Review page displays.

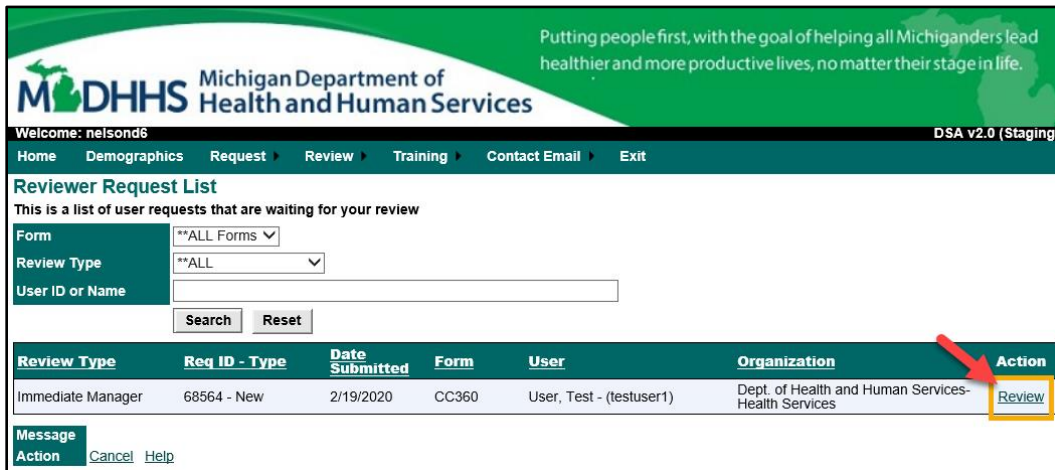
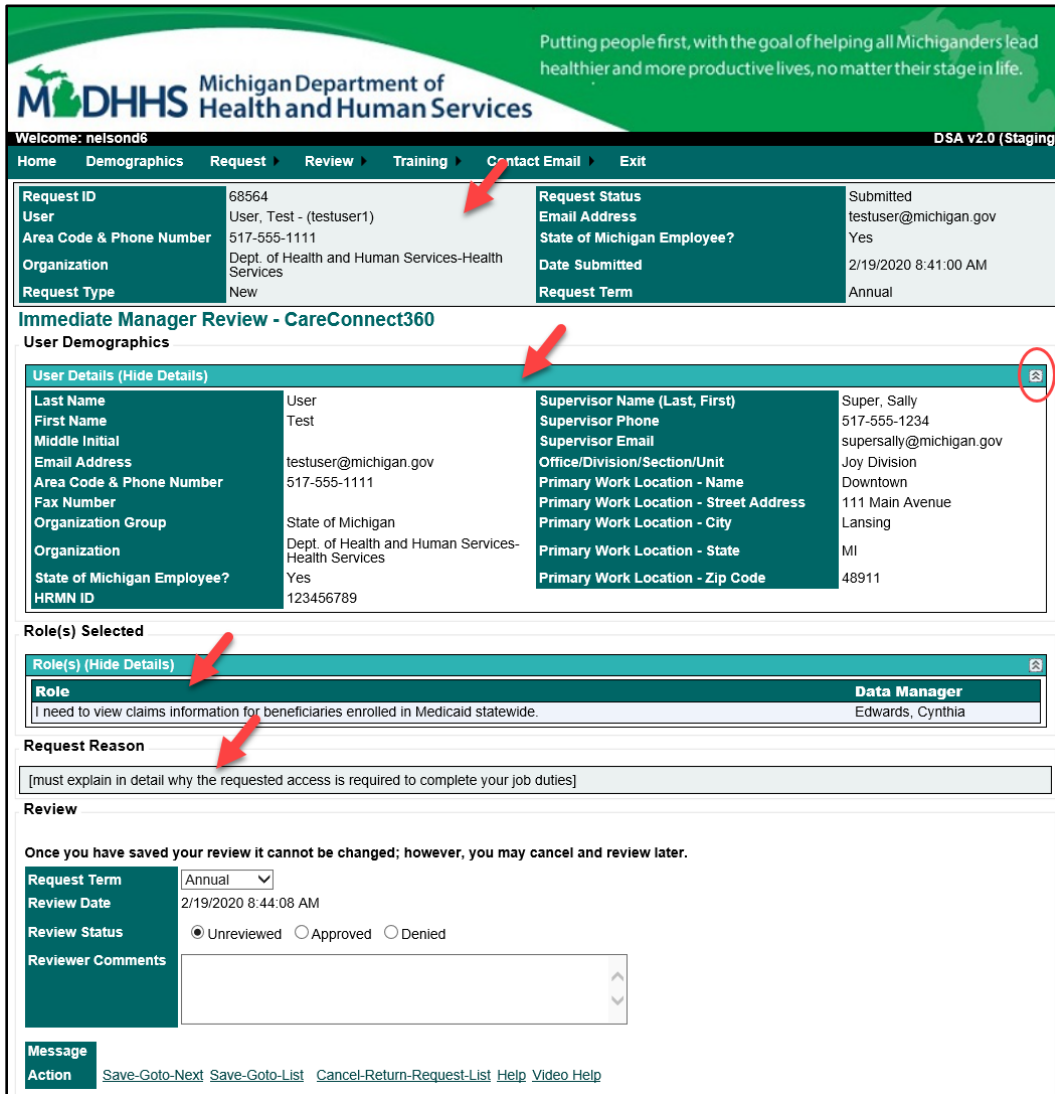


Figure 3.1.2: Reviewer Request List – Immediate Manager

Note: Use the search fields (Figure 3.1.2, above) to locate the request, if necessary.

4. Verify the user information (Figure 3.1.3).
5. Click the arrow beside **User Details** to expand and review additional user demographics.
6. Verify the requested documents/profiles/programs/reports/roles/user groups, and confirm the **Request Reason** explains the need.



Putting people first, with the goal of helping all Michiganders lead healthier and more productive lives, no matter their stage in life.

MDHHS Michigan Department of Health and Human Services

Welcome: nelsond6 DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

Request ID	68564	Request Status	Submitted
User	User, Test - (testuser1)	Email Address	testuser@michigan.gov
Area Code & Phone Number	517-555-1111	State of Michigan Employee?	Yes
Organization	Dept. of Health and Human Services-Health Services	Date Submitted	2/19/2020 8:41:00 AM
Request Type	New	Request Term	Annual

Immediate Manager Review - CareConnect360

User Demographics

User Details (Hide Details)

Last Name	User	Supervisor Name (Last, First)	Super, Sally
First Name	Test	Supervisor Phone	517-555-1234
Middle Initial		Supervisor Email	supersally@michigan.gov
Email Address	testuser@michigan.gov	Office/Division/Section/Unit	Joy Division
Area Code & Phone Number	517-555-1111	Primary Work Location - Name	Downtown
Fax Number		Primary Work Location - Street Address	111 Main Avenue
Organization Group	State of Michigan	Primary Work Location - City	Lansing
Organization	Dept. of Health and Human Services-Health Services	Primary Work Location - State	MI
State of Michigan Employee?	Yes	Primary Work Location - Zip Code	48911
HRMN ID	123456789		

Role(s) Selected

Role(s) (Hide Details)

Role	Data Manager
I need to view claims information for beneficiaries enrolled in Medicaid statewide.	
	Edwards, Cynthia

Request Reason

[must explain in detail why the requested access is required to complete your job duties]

Review

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request Term: Annual

Review Date: 2/19/2020 8:44:08 AM

Review Status:  Unreviewed  Approved  Denied

Reviewer Comments:

Message

Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.1.3: Immediate Manager Review

7. Some applications allow for short-term access. If so, the **Request Term** field displays (Figure 3.1.4). To define the short-term request:
  - a. Select 'ShortTerm' (default value is 'Annual'). The **End Date** field appears.
  - b. Enter the **End Date** to indicate the length of short-term access being approved.

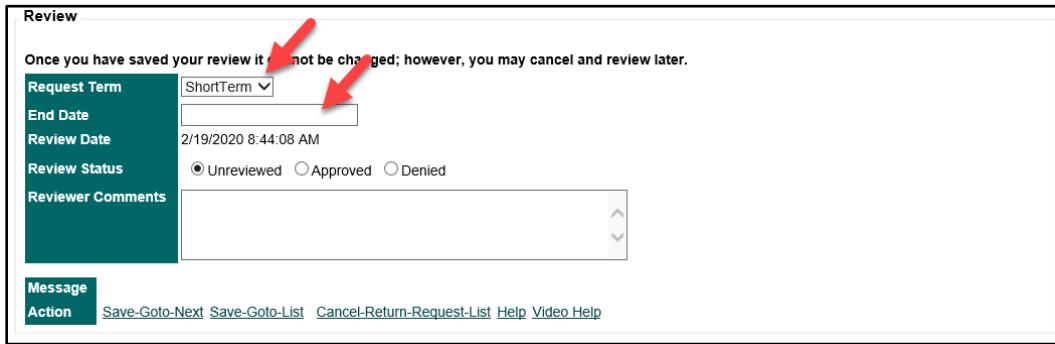


Figure 3.1.4: Immediate Manager Review – Short Term Access

8. To approve the access request, select the **Approved** radio button (Figure 3.1.5).
  9. To deny the access request, select the **Denied** radio button.
  10. Enter **Reviewer Comments** as appropriate. *Comments are required when denying.*
  11. Click Save Goto Next to save the review, advance to the next access request awaiting review.
- or-
- Click Save Goto List to save the review and return to the list of requests awaiting review.

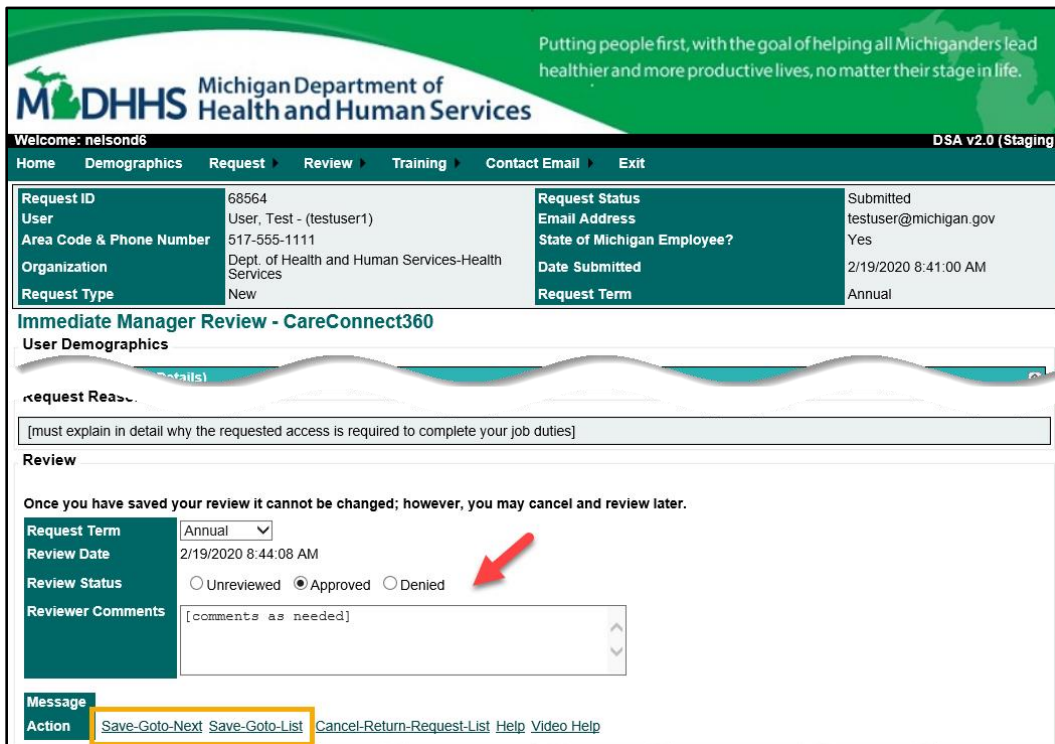


Figure 3.1.5: Immediate Manager Review

**Note: When approved**, the request automatically advances to the next required approver, and an email notification is sent informing the approver that an access request is awaiting review. **When denied**, the review ends and the user receives email notification.

## 3.2 MDHHS Sponsor Review

The MDHHS Sponsor works closely with the external (non-MDHHS) organization, and understands the organization’s access needs. The MDHHS Sponsor continues the review process by confirming the external user’s need for access to the requested MDHHS application.

Complete the following steps to perform a review as an MDHHS Sponsor:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Review Requests** from the **Review** sub-menu (*Figure 3.2.1*).  
 -or-  
 Click Go To Review in the Request Pending Review(s) dashboard.

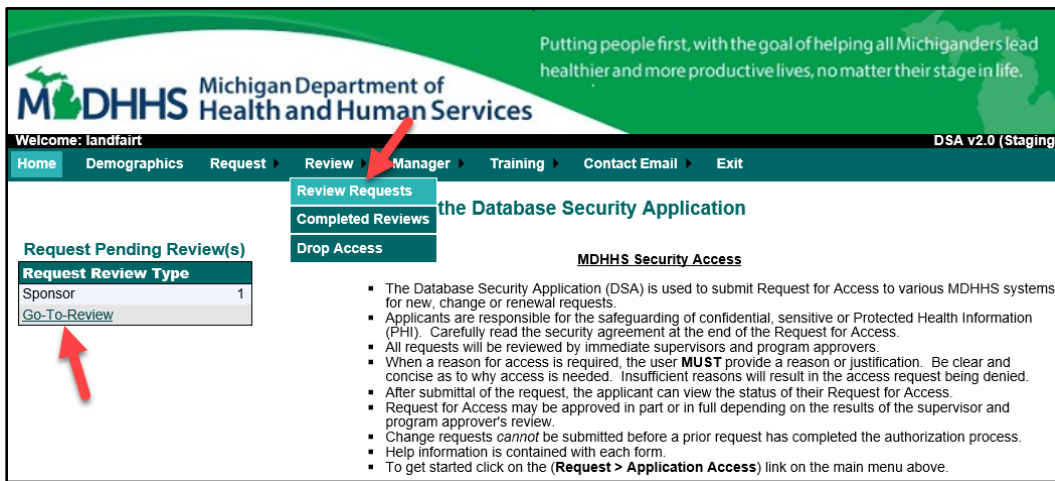


Figure 3.2.1: Home

3. Click Review beside the request to be reviewed (*Figure 3.2.2*). The Sponsor Review page displays.

*Note:* Use the search fields to locate the request, if necessary.

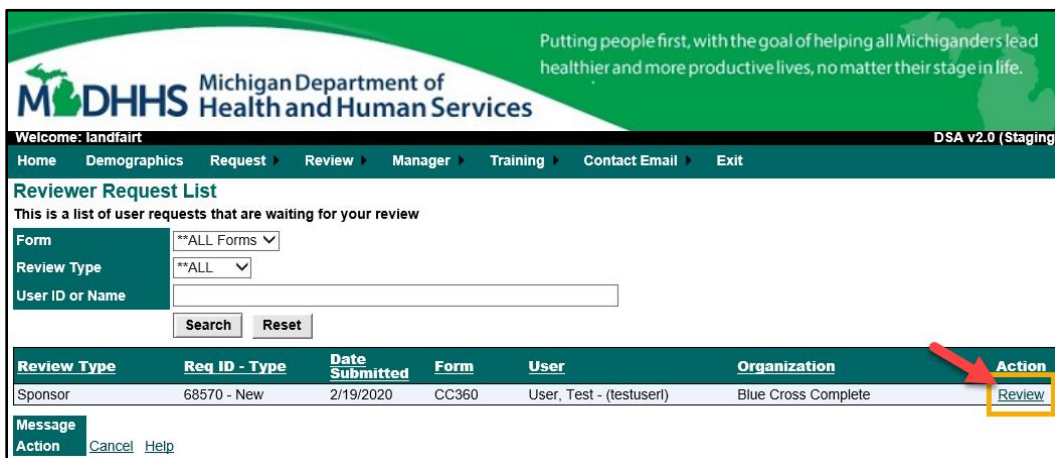
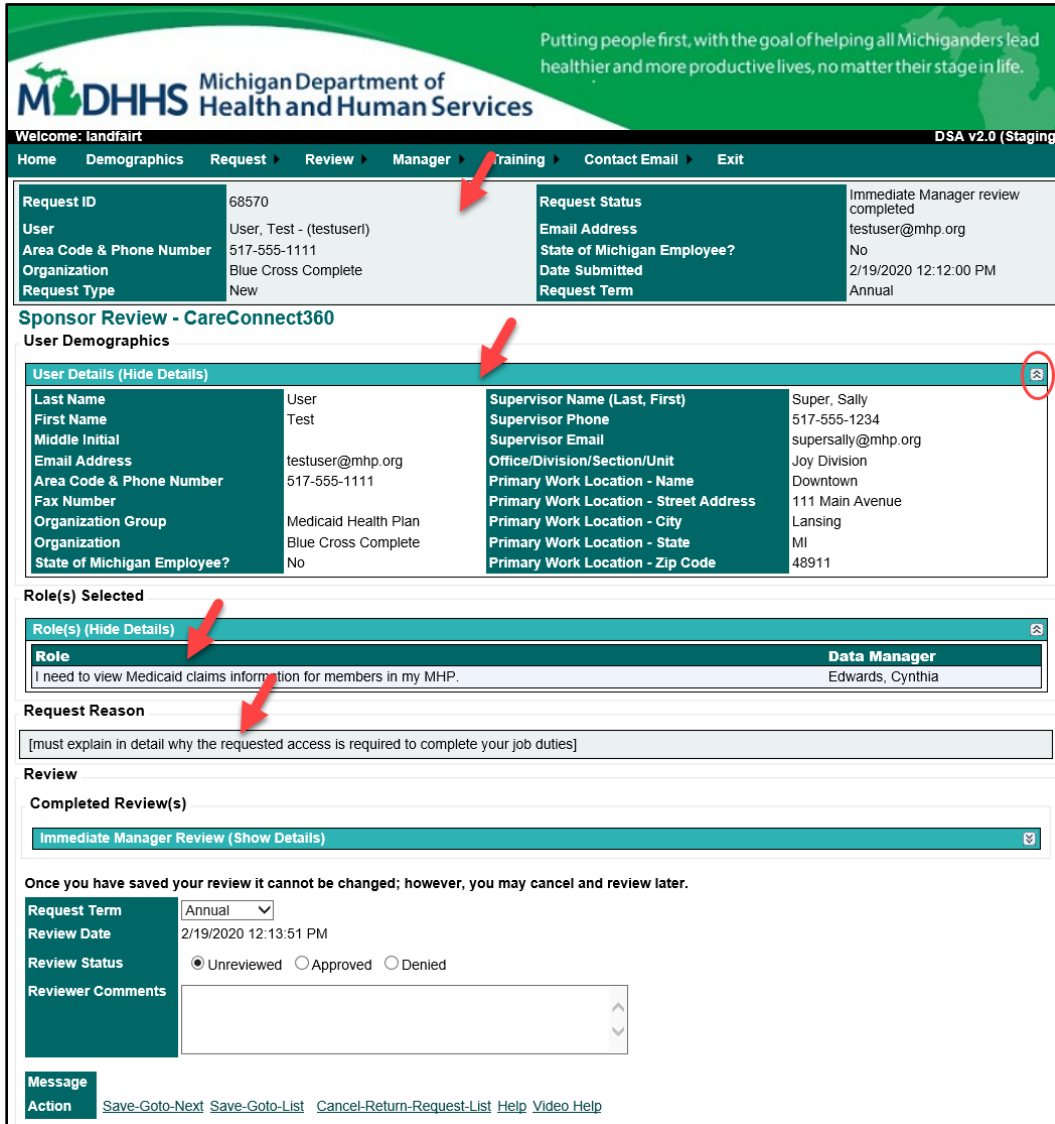


Figure 3.2.2: Reviewer Request List – Sponsor

4. Verify the user information (*Figure 3.2.3*).
5. Click the arrow beside **User Details** to expand and review additional user demographics.
6. Verify the requested documents/profiles/programs/reports/roles/user groups, and confirm the **Request Reason** explains the need.



Michigan Department of Health and Human Services  
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
Welcome: landfairt DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Contact Email Exit

<b>Request ID</b>	68570	<b>Request Status</b>	Immediate Manager review completed
<b>User</b>	User, Test - (testuser1)	<b>Email Address</b>	testuser@mhp.org
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>State of Michigan Employee?</b>	No
<b>Organization</b>	Blue Cross Complete	<b>Date Submitted</b>	2/19/2020 12:12:00 PM
<b>Request Type</b>	New	<b>Request Term</b>	Annual


**Sponsor Review - CareConnect360**

User Demographics

**User Details (Hide Details)** 

<b>Last Name</b>	User	<b>Supervisor Name (Last, First)</b>	Super, Sally
<b>First Name</b>	Test	<b>Supervisor Phone</b>	517-555-1234
<b>Middle Initial</b>		<b>Supervisor Email</b>	supersally@mhp.org
<b>Email Address</b>	testuser@mhp.org	<b>Office/Division/Section/Unit</b>	Joy Division
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>Primary Work Location - Name</b>	Downtown
<b>Fax Number</b>		<b>Primary Work Location - Street Address</b>	111 Main Avenue
<b>Organization Group</b>	Medicaid Health Plan	<b>Primary Work Location - City</b>	Lansing
<b>Organization</b>	Blue Cross Complete	<b>Primary Work Location - State</b>	MI
<b>State of Michigan Employee?</b>	No	<b>Primary Work Location - Zip Code</b>	48911

**Role(s) Selected**

**Role(s) (Hide Details)** 


<b>Role</b>	<b>Data Manager</b>
I need to view Medicaid claims information for members in my MHP.	Edwards, Cynthia

**Request Reason**

[must explain in detail why the requested access is required to complete your job duties]

**Review**

**Completed Review(s)**

**Immediate Manager Review (Show Details)** 

Once you have saved your review it cannot be changed; however, you may cancel and review later.

<b>Request Term</b>	Annual
<b>Review Date</b>	2/19/2020 12:13:51 PM
<b>Review Status</b>	<input checked="" type="radio"/> Unreviewed <input type="radio"/> Approved <input type="radio"/> Denied
<b>Reviewer Comments</b>	<input type="text"/>

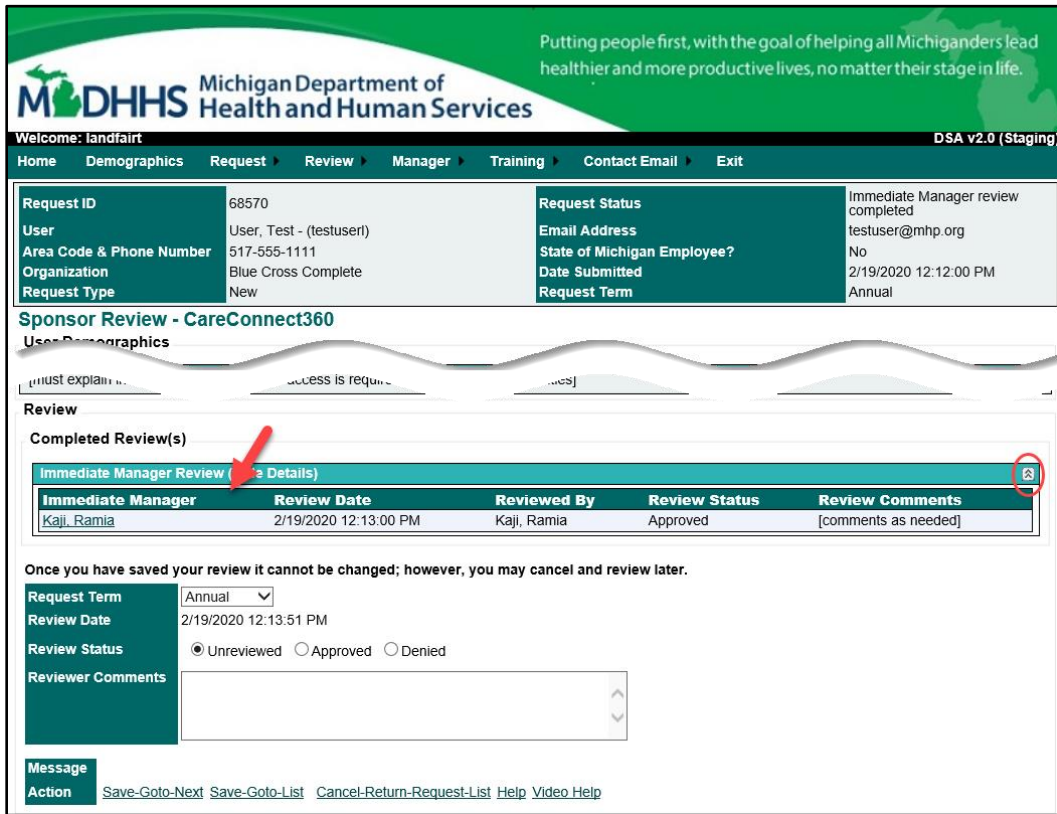
**Message**

Action [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.2.3: Sponsor Review

7. Under **Completed Review(s)**, click the arrow beside **Immediate Manager Review** (or **Authorized Requestor Review**) to expand and review the Immediate Manager's determination (*Figure 3.2.4*).

*Note:* If there are any questions for the Immediate Manager, the name is a link. Click the link to email your questions.



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Michigan Department of Health and Human Services

Welcome: landfairt DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Contact Email Exit

Request ID	68570	Request Status	Immediate Manager review completed
User	User, Test - (testuser1)	Email Address	testuser@mhp.org
Area Code & Phone Number	517-555-1111	State of Michigan Employee?	No
Organization	Blue Cross Complete	Date Submitted	2/19/2020 12:12:00 PM
Request Type	New	Request Term	Annual

**Sponsor Review - CareConnect360**

User Demographics

Review

Completed Review(s)

Immediate Manager	Review Date	Reviewed By	Review Status	Review Comments
Kaji, Ramia	2/19/2020 12:13:00 PM	Kaji, Ramia	Approved	[comments as needed]

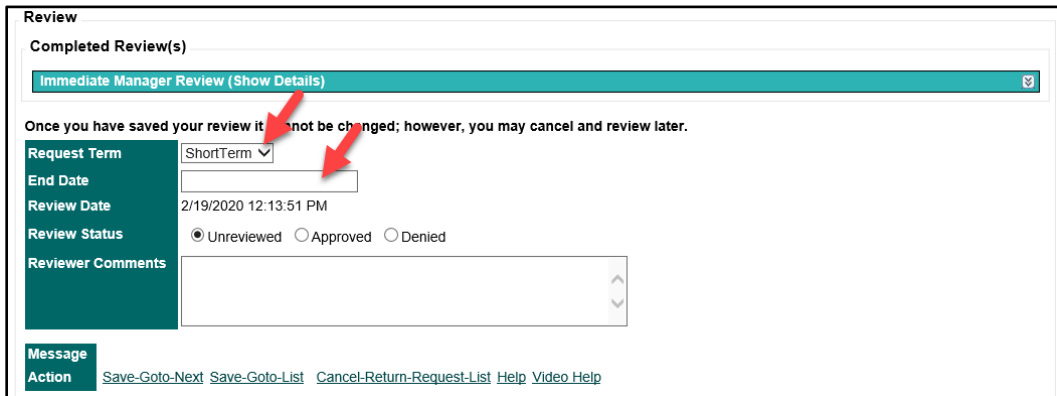
Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request Term: Annual  
 Review Date: 2/19/2020 12:13:51 PM  
 Review Status:  Unreviewed  Approved  Denied  
 Reviewer Comments: [text area]

Message  
 Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.2.4: Sponsor Review

7. Some applications allow for short-term access. If so, the **Request Term** field displays (Figure 3.2.5). To define the short-term request:
  - a. Select or confirm 'ShortTerm' (default value is 'Annual').
  - b. Enter or confirm the **End Date** to indicate the length of the short-term access being approved.



Review

Completed Review(s)

Immediate Manager Review (Show Details)

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request Term: ShortTerm  
 End Date: [text field]  
 Review Date: 2/19/2020 12:13:51 PM  
 Review Status:  Unreviewed  Approved  Denied  
 Reviewer Comments: [text area]

Message  
 Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.2.5: Sponsor Review – Short Term Access

8. To approve the access request, select the **Approved** radio button (Figure 3.2.6).
9. To deny the access request, select the **Denied** radio button.

10. Enter **Reviewer Comments** as appropriate. *Comments are required when denying.*
  11. Click Save Goto Next to save the review, advance to the next access request awaiting review.
- or-
- Click Save Goto List to save the review and return to the list of requests awaiting review.

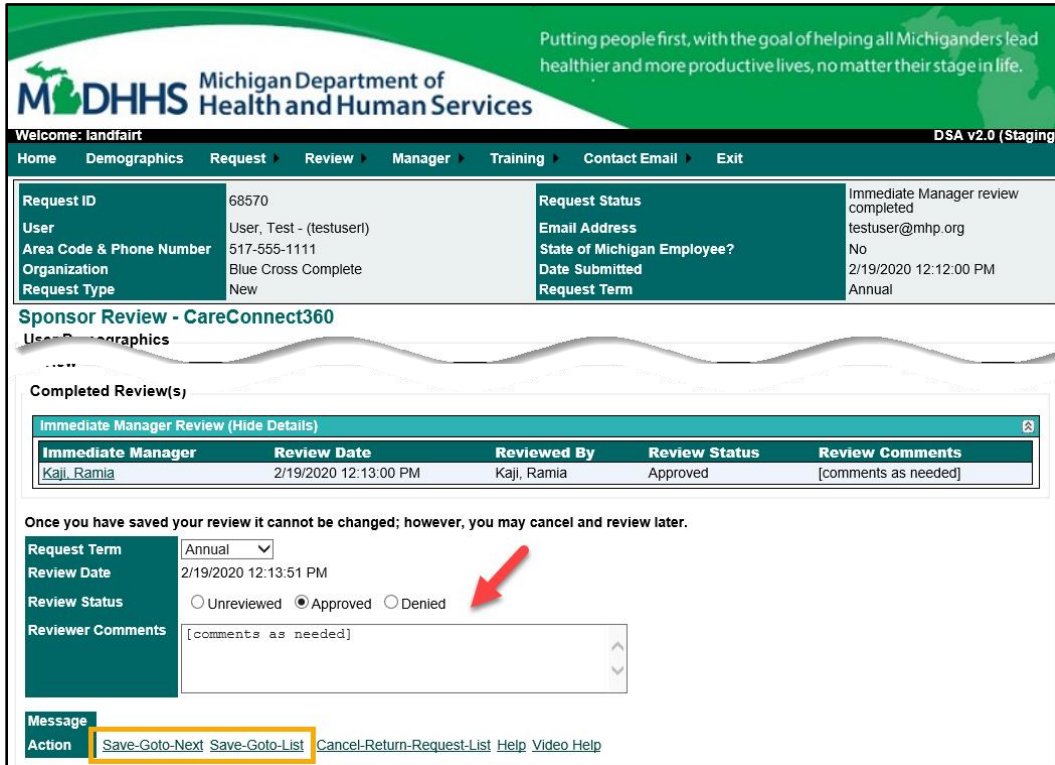


Figure 3.2.6: Sponsor Review

**Note: When approved**, the request automatically advances to the next required approver, and an email notification is sent informing the approver that an access request is awaiting review. **When denied**, the review ends and the user receives email notification.

### 3.3 Program Manager Review

Individual data sets within an application may be approved by different Program Managers (also known as Data Managers, Profile Managers, Program Managers, Report Managers, Role Managers, etc.). Each Program Manager abides by mandated criteria for allowing users access to specific data, and approves or denies access accordingly.

Complete the following steps to perform a review as a Program Manager:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Review Requests** from the **Review** sub-menu (*Figure 3.3.1*).

-or-

Click Go To Review in the Requests Pending Review(s) dashboard.

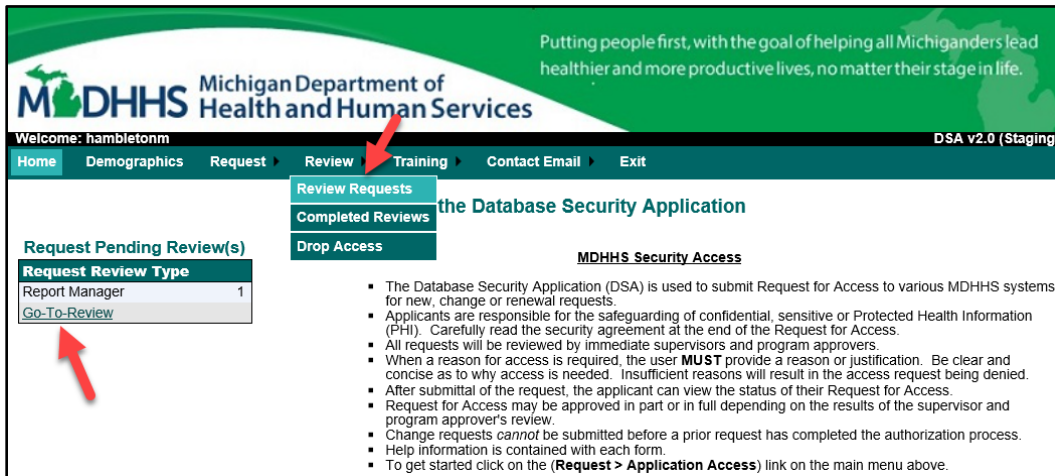


Figure 3.3.1: Home

3. Click Review beside the request to be reviewed (*Figure 3.3.2*). The Program Manager Review page displays.

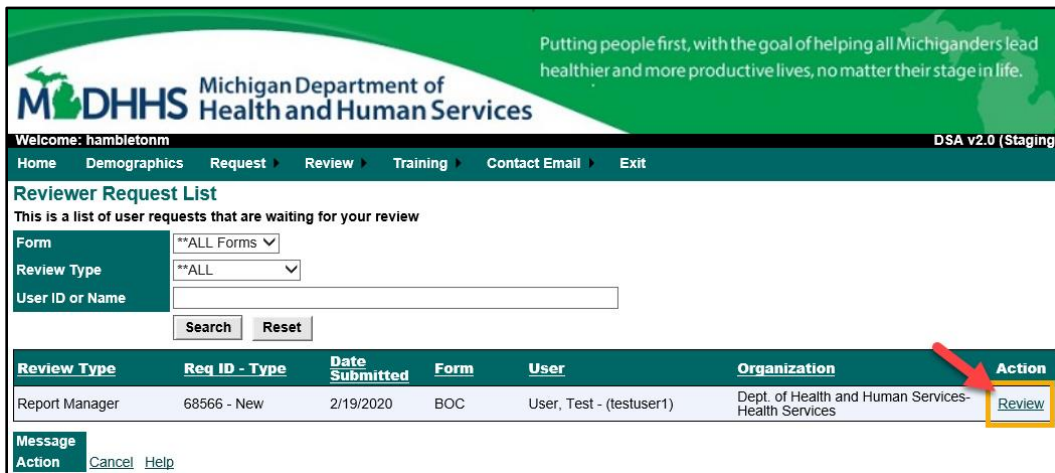
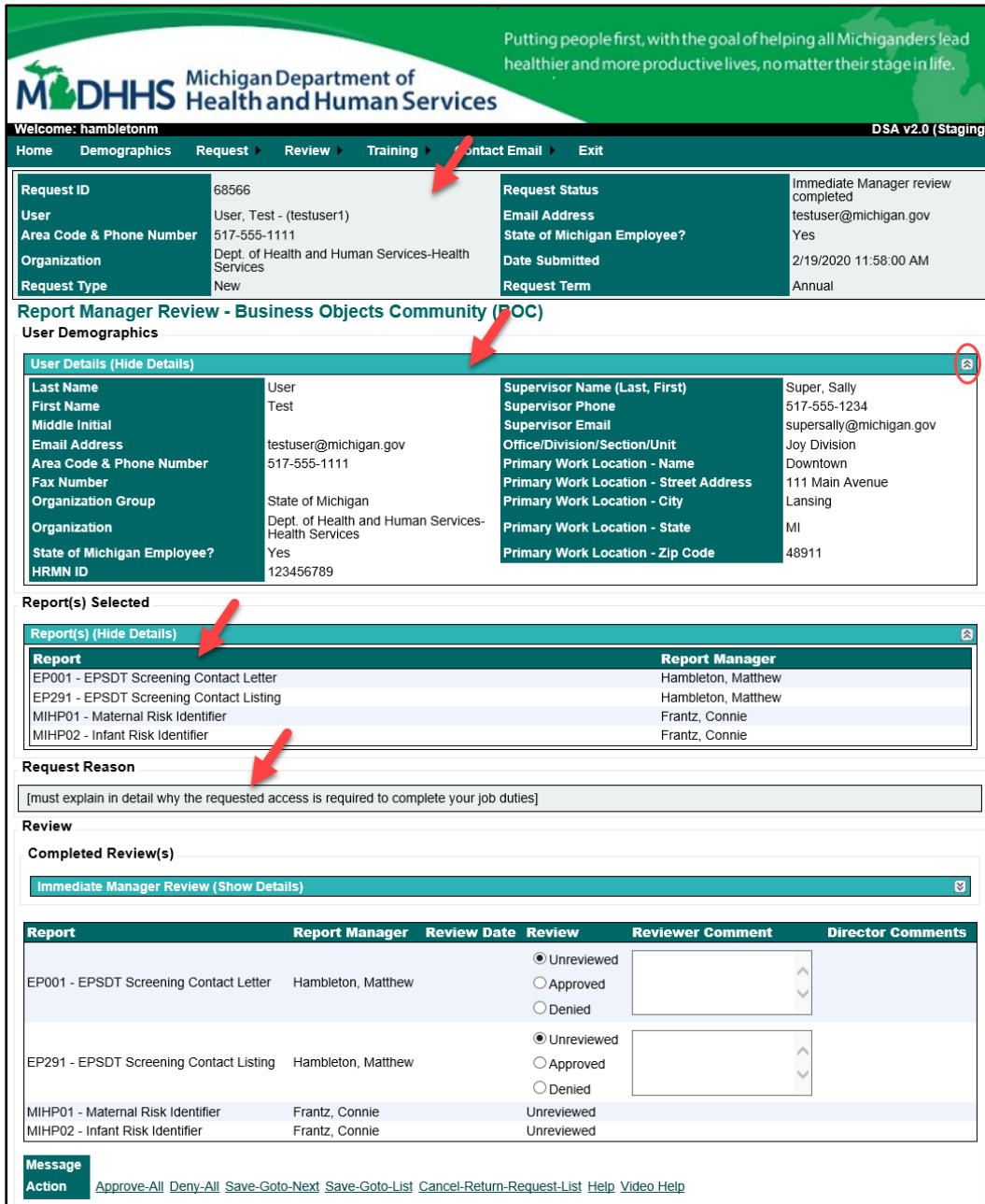


Figure 3.3.2: Reviewer Request List – Program Manager (a.k.a. Report Manager, etc.)



Note: Use the search fields (Figure 3.3.2, above) to locate the request, if necessary.

4. Verify the user information (Figure 3.3.3).
5. Click the arrow beside **User Details** to expand and review additional user demographics.
6. Verify the requested documents/profiles/programs/reports/roles/user groups, and confirm the **Request Reason** explains the need.



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Michigan Department of Health and Human Services

Welcome: hambletonm DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

Request ID	68566	Request Status	Immediate Manager review completed
User	User, Test - (testuser1)	Email Address	testuser@michigan.gov
Area Code & Phone Number	517-555-1111	State of Michigan Employee?	Yes
Organization	Dept. of Health and Human Services-Health Services	Date Submitted	2/19/2020 11:58:00 AM
Request Type	New	Request Term	Annual

**Report Manager Review - Business Objects Community (BOC)**

User Demographics

User Details (Hide Details)

Last Name	User	Supervisor Name (Last, First)	Super, Sally
First Name	Test	Supervisor Phone	517-555-1234
Middle Initial		Supervisor Email	supersally@michigan.gov
Email Address	testuser@michigan.gov	Office/Division/Section/Unit	Joy Division
Area Code & Phone Number	517-555-1111	Primary Work Location - Name	Downtown
Fax Number		Primary Work Location - Street Address	111 Main Avenue
Organization Group	State of Michigan	Primary Work Location - City	Lansing
Organization	Dept. of Health and Human Services-Health Services	Primary Work Location - State	MI
State of Michigan Employee?	Yes	Primary Work Location - Zip Code	48911
HRMN ID	123456789		

Report(s) Selected

Report(s) (Hide Details)

Report	Report Manager
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew
MIHP01 - Maternal Risk Identifier	Frantz, Connie
MIHP02 - Infant Risk Identifier	Frantz, Connie

Request Reason

[must explain in detail why the requested access is required to complete your job duties]

Review

Completed Review(s)

Immediate Manager Review (Show Details)

Report	Report Manager	Review Date	Review	Reviewer Comment	Director Comments
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew		<input checked="" type="radio"/> Unreviewed <input type="radio"/> Approved <input type="radio"/> Denied		
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew		<input checked="" type="radio"/> Unreviewed <input type="radio"/> Approved <input type="radio"/> Denied		
MIHP01 - Maternal Risk Identifier	Frantz, Connie		Unreviewed		
MIHP02 - Infant Risk Identifier	Frantz, Connie		Unreviewed		

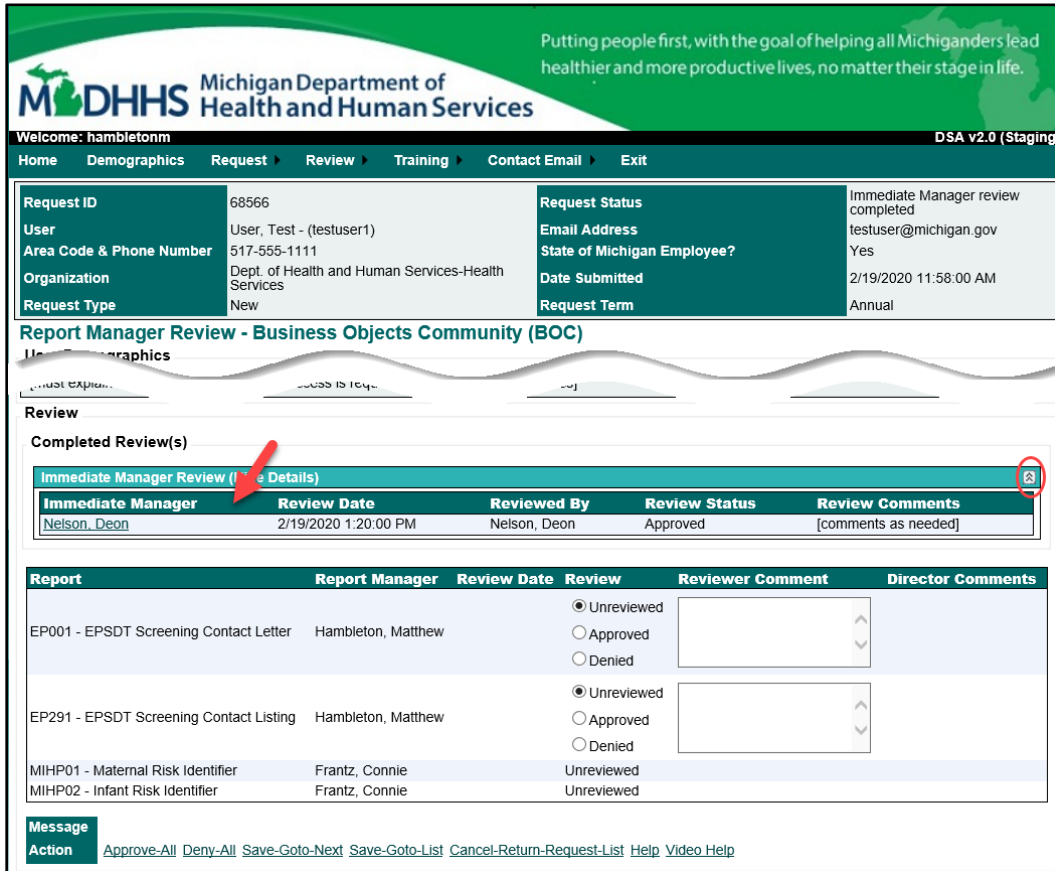
Message

Action [Approve-All](#) [Deny-All](#) [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.3.3: Program Manager Review

- Under **Completed Review(s)**, click the arrow beside **Immediate Manager Review**, and **Sponsor Review** if applicable, to expand and review the Immediate Manager’s and MDHHS Sponsor’s determinations (Figure 3.3.4).

*Note:* If there are any questions for the Immediate Manager, the name is a link. Click the link to email your questions.



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MDHHS Michigan Department of Health and Human Services

Welcome: hambletonm DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

<b>Request ID</b>	68566	<b>Request Status</b>	Immediate Manager review completed
<b>User</b>	User, Test - (testuser1)	<b>Email Address</b>	testuser@michigan.gov
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>State of Michigan Employee?</b>	Yes
<b>Organization</b>	Dept. of Health and Human Services-Health Services	<b>Date Submitted</b>	2/19/2020 11:58:00 AM
<b>Request Type</b>	New	<b>Request Term</b>	Annual

**Report Manager Review - Business Objects Community (BOC)**

Review

Completed Review(s)

Immediate Manager	Review Date	Reviewed By	Review Status	Review Comments
<a href="#">Nelson, Deon</a>	2/19/2020 1:20:00 PM	Nelson, Deon	Approved	[comments as needed]

Report	Report Manager	Review Date	Review	Reviewer Comment	Director Comments
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew		<input checked="" type="radio"/> Unreviewed <input type="radio"/> Approved <input type="radio"/> Denied		
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew		<input checked="" type="radio"/> Unreviewed <input type="radio"/> Approved <input type="radio"/> Denied		
MIHP01 - Maternal Risk Identifier	Frantz, Connie		Unreviewed		
MIHP02 - Infant Risk Identifier	Frantz, Connie		Unreviewed		

Message

Action [Approve-All](#) [Deny-All](#) [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.3.4: Program Manager Review

*Note:* In some instances, multiple Program Managers are responsible for approving the different data sets requested. This is indicated by the **Approved** and **Denied** radio buttons only appearing as active and available for the current approver.

- To approve access to the document/profile/program/report/role/user group, select the **Approved** radio button (Figure 3.3.5).
- To deny access to the document/profile/program/report/role/user group, select the **Denied** radio button.
- Enter **Reviewer Comments** as appropriate. *Comments are required when denying.*

11. Click Save Goto Next to save the review, advance to the next access awaiting review.

-or-

Click Save Goto List to save the review and return to the list of requests awaiting review.

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**MDHHS** Michigan Department of Health and Human Services

Welcome: hamletonm DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

<b>Request ID</b>	68566	<b>Request Status</b>	Immediate Manager review completed
<b>User</b>	User, Test - (testuser1)	<b>Email Address</b>	testuser@michigan.gov
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>State of Michigan Employee?</b>	Yes
<b>Organization</b>	Dept. of Health and Human Services-Health Services	<b>Date Submitted</b>	2/19/2020 11:58:00 AM
<b>Request Type</b>	New	<b>Request Term</b>	Annual

**Report Manager Review - Business Objects Community (BOC)**

User Demographics

Review

Completed Review(s)

Immediate Manager	Review Date	Reviewed By	Review Status	Review Comments
Nelson, Deon	2/19/2020 1:20:00 PM	Nelson, Deon	Approved	[comments as needed]

Report	Report Manager	Review Date	Review	Reviewer Comment	Director Comments
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew		<input type="radio"/> Unreviewed <input checked="" type="radio"/> Approved <input type="radio"/> Denied	[comments as needed]	
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew		<input type="radio"/> Unreviewed <input checked="" type="radio"/> Approved <input type="radio"/> Denied	[comments as needed]	
MIHP01 - Maternal Risk Identifier	Frantz, Connie		Unreviewed		
MIHP02 - Infant Risk Identifier	Frantz, Connie		Unreviewed		

**Message**

Action Approve-All Deny-All **Save-Goto-Next** **Save-Goto-List** Cancel-Return-Request-List Help Video Help

Figure 3.3.5: Program Manager Review

**Note: Regardless of approval or denial, once all Program Managers have completed their review the request automatically advances to the Director for final review and approval. An email notification is sent informing the Director that a request is awaiting review.**

## 3.4 Director Review

The Director reviews all previous determinations made during the approval cycle, and indicates final approval or denial as appropriate. This action completes the review and approval portion of the access request process.

Upon final Director approval, the Security Administrator receives notification to finalize the access request (complete the process).

*Note:* For applications containing Protected Health Information (PHI), there is a Training Manager step prior to the Security Administrator step. The Training Manager step exists to confirm each user has completed required Privacy and Security Training before any approved security role(s) can be granted.

Complete the following steps to perform a review as a Director:

1. Complete the steps in [1.4 Accessing the DSA](#).
  2. Select **Review Requests** from the **Review** sub-menu (*Figure 3.4.1*).
- or-**
- Click Go To Review in the Requests Pending Review(s) dashboard.

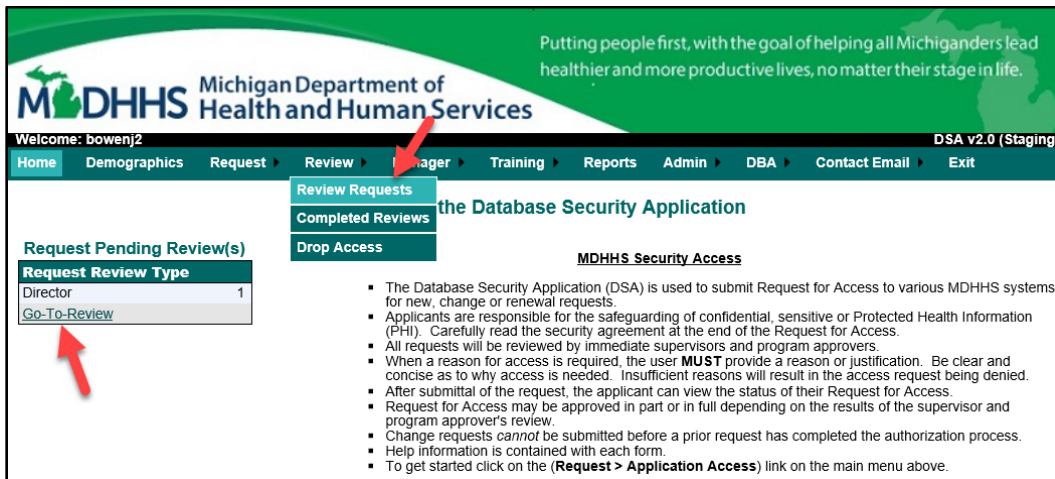


Figure 3.4.1: Home

3. Click **Review** beside the request to be reviewed (*Figure 3.4.2*). The Director Review page displays.

*Note:* Use the search fields to locate the request, if necessary.

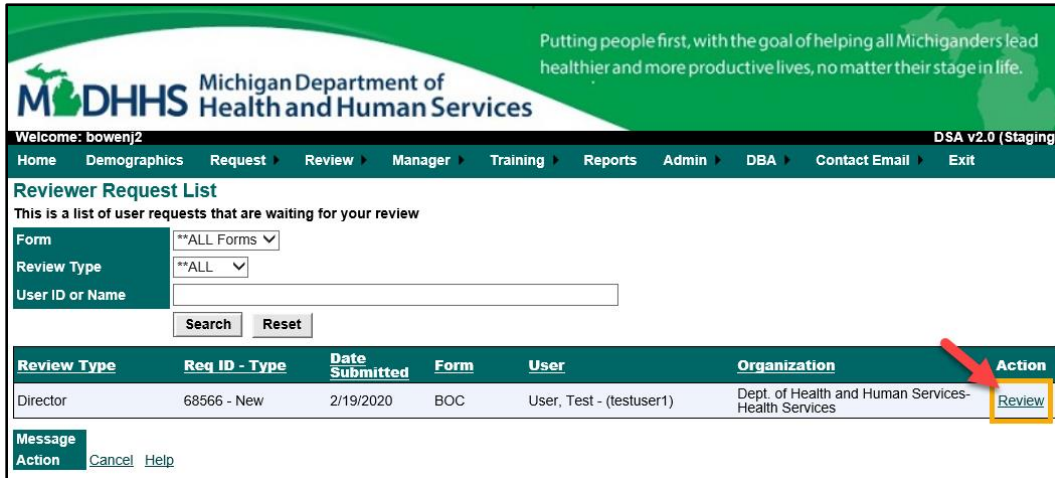
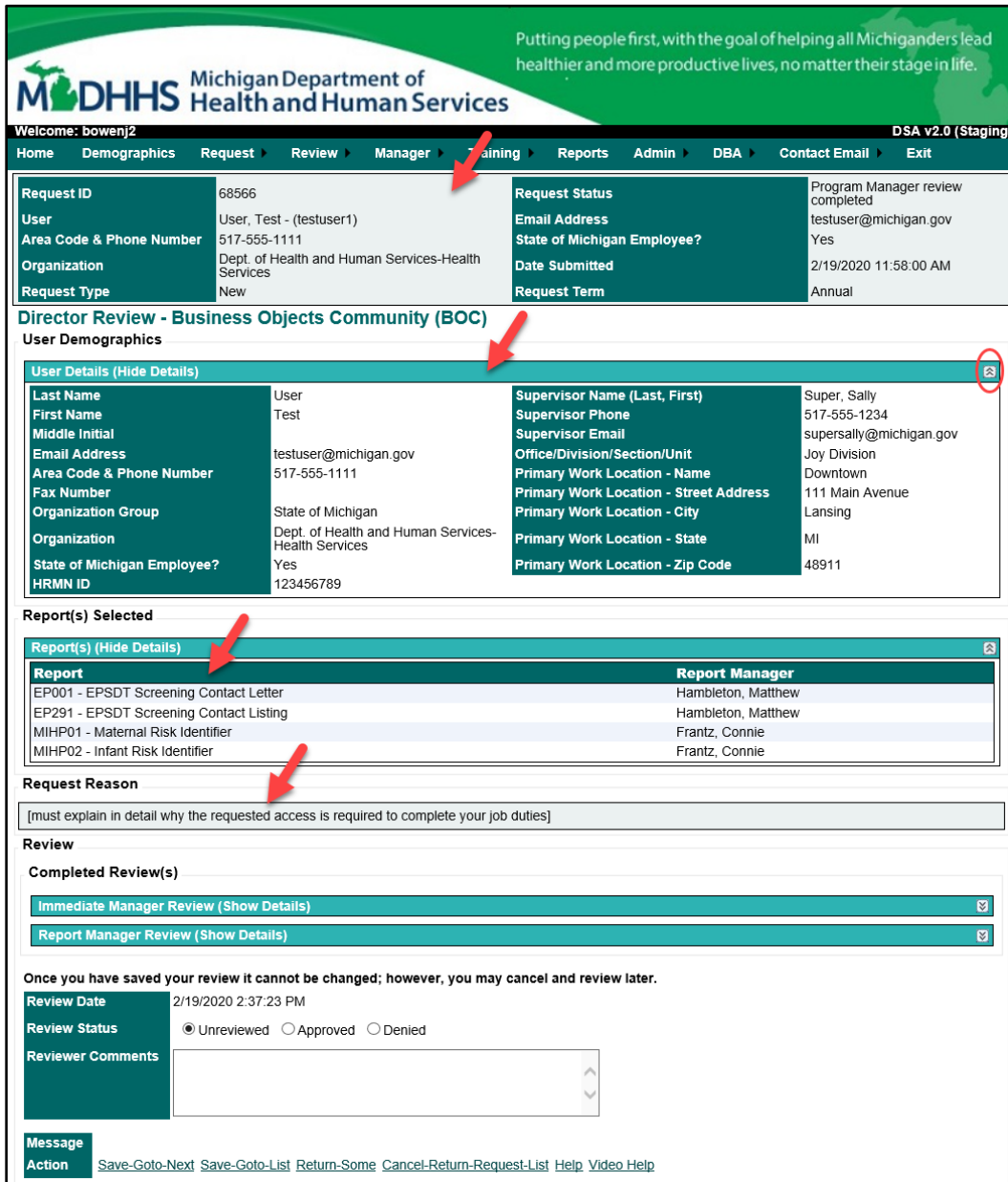


Figure 3.4.2: Reviewer Request List – Director

4. Verify the user information (*Figure 3.4.3*).
5. Click the arrow beside **User Details** to expand and review additional user demographics.
6. Verify the requested documents/profiles/programs/reports/roles/user groups, and confirm the **Request Reason** explains the need.



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Welcome: bowenj2 DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Reports Admin DBA Contact Email Exit

<b>Request ID</b>	68566	<b>Request Status</b>	Program Manager review completed
<b>User</b>	User, Test - (testuser1)	<b>Email Address</b>	testuser@michigan.gov
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>State of Michigan Employee?</b>	Yes
<b>Organization</b>	Dept. of Health and Human Services-Health Services	<b>Date Submitted</b>	2/19/2020 11:58:00 AM
<b>Request Type</b>	New	<b>Request Term</b>	Annual

**Director Review - Business Objects Community (BOC)**

User Demographics

User Details (Hide Details)

<b>Last Name</b>	User	<b>Supervisor Name (Last, First)</b>	Super, Sally
<b>First Name</b>	Test	<b>Supervisor Phone</b>	517-555-1234
<b>Middle Initial</b>		<b>Supervisor Email</b>	supersally@michigan.gov
<b>Email Address</b>	testuser@michigan.gov	<b>Office/Division/Section/Unit</b>	Joy Division
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>Primary Work Location - Name</b>	Downtown
<b>Fax Number</b>		<b>Primary Work Location - Street Address</b>	111 Main Avenue
<b>Organization Group</b>	State of Michigan	<b>Primary Work Location - City</b>	Lansing
<b>Organization</b>	Dept. of Health and Human Services-Health Services	<b>Primary Work Location - State</b>	MI
<b>State of Michigan Employee?</b>	Yes	<b>Primary Work Location - Zip Code</b>	48911
<b>HRMN ID</b>	123456789		

Report(s) Selected

Report(s) (Hide Details)

Report	Report Manager
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew
MIHP01 - Maternal Risk Identifier	Frantz, Connie
MIHP02 - Infant Risk Identifier	Frantz, Connie

Request Reason

[must explain in detail why the requested access is required to complete your job duties]

Review

Completed Review(s)

- Immediate Manager Review (Show Details)
- Report Manager Review (Show Details)

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Review Date: 2/19/2020 2:37:23 PM

Review Status:  Unreviewed  Approved  Denied

Reviewer Comments:

Message Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Return-Some](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.4.3: Director Review

- Under **Completed Review(s)**, click the arrow beside **Immediate Manager Review** to expand and review the Immediate Manager's determination (Figure 3.4.4).

*Note:* If there are any questions for the Immediate Manager, the name is a link. Click the link to email your questions.

- Click the arrow beside **Sponsor Review**, if applicable, and beside **Program Manager Review** (**Report Manager Review** in Figure 3.4.4 example) to expand and review the MDHHS Sponsor's and Program Manager's determinations.

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Michigan Department of Health and Human Services

Welcome: bowenj2 DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Reports Admin DBA Contact Email Exit

Request ID	68566	Request Status	Program Manager review completed
User	User, Test - (testuser1)	Email Address	testuser@michigan.gov
Area Code & Phone Number	517-555-1111	State of Michigan Employee?	Yes
Organization	Dept. of Health and Human Services-Health Services	Date Submitted	2/19/2020 11:58:00 AM
Request Type	New	Request Term	Annual

### Director Review - Business Objects Community (BOC)

User Demographics

[must explain in detail why the requested access is required to complete your job duties]

**Review**

Completed Review(s)

Immediate Manager Review (Show Details)					
Immediate Manager	Review Date	Reviewed By	Review Status	Review Comments	
Nelson, Deon	2/19/2020 1:20:00 PM	Nelson, Deon	Approved	[comments as needed]	

Report Manager Review (Hide Details)						
Report	Report Manager	Review Date	Reviewed By	Review Status	Review Comments	Director Comments
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew	2/19/2020 1:51:00 PM	Hambleton, Matthew	Approved	[comments as needed]	
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew	2/19/2020 1:51:00 PM	Hambleton, Matthew	Approved	[comments as needed]	
MIHP01 - Maternal Risk Identifier	Frantz, Connie	2/19/2020 1:53:00 PM	Frantz, Connie	Approved	[comments as needed]	
MIHP02 - Infant Risk Identifier	Frantz, Connie	2/19/2020 1:53:00 PM	Frantz, Connie	Approved	[comments as needed]	

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Review Date: 2/19/2020 2:37:23 PM

Review Status:  Unreviewed  Approved  Denied

Reviewer Comments:

Message

Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Return-Some](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.4.4: Director Review

9. To return some or all of the access request to a Program Manager for reconsideration:
  - a. Click Return Some at the bottom (Figure 3.4.5). The Return Some window displays.

Review

Completed Review(s)

Immediate Manager Review (Show Details)	☑
Report Manager Review (Show Details)	☑

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Review Date: 2/19/2020 2:37:23 PM

Review Status:  Unreviewed  Approved  Denied

Reviewer Comments:

Message

Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Return-Some](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.4.5: Director Review

- b. Select the **Send Back?/Update** check box(es) (*Figure 3.4.6*) beside the item(s) to be returned to the Program Manager(s).
- c. Enter a **Director Comment** for each item to be returned, explaining why it is being returned. *Comments are required.*
- d. Click Save. The Program Manager receives an email notification indicating the return.

Check here to update your review(s) or return to other Report Manager(s)

Send Back? / Update	Report	Report Manager	Review Status	Review Comments	Director Comment
<input type="checkbox"/>	EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew	Approved	Date: 2/20/2020 9:05:00 AM [comments as needed]	
<input type="checkbox"/>	EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew	Approved	Date: 2/20/2020 9:05:00 AM [comments as needed]	
<input type="checkbox"/>	MIHP01 - Maternal Risk Identifier	Frantz, Connie	Approved	Date: 2/20/2020 9:06:00 AM [comments as needed]	
<input type="checkbox"/>	MIHP02 - Infant Risk Identifier	Frantz, Connie	Approved	Date: 2/20/2020 9:06:00 AM [comments as needed]	

Message Action

Figure 3.4.6: Return Some

10. To approve the access request, select the **Approved** radio button (*Figure 3.4.7*).
11. To deny the access request, select the **Denied** radio button.
12. Enter **Reviewer Comments** as appropriate. *Comments are required when denying.*
13. Click Save Goto Next to save the final determination, advance to the next access request awaiting review.

**-or-**

Click Save Goto List to save the final determination and return to the list of requests awaiting review.

*Note:* For applications containing PHI, **when approved** the request advances to the Training Manager step to confirm the user has completed required Privacy and Security training before any approved security role(s) can be granted. Upon receiving training confirmation, the Security Administrator receives email notification to finalize the access request.

Otherwise, **when approved** the Security Administrator receives an email notification instructing them to grant the approved access and assign the user’s security role within the source application.

**When denied**, the review ends and the user is notified.



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Welcome: bowenj2
DSA v2.0 (Staging)

Home
Demographics
Request
Review
Manager
Training
Reports
Admin
DBA
Contact Email
Exit

<b>Request ID</b>	68566	<b>Request Status</b>	Program Manager review completed
<b>User</b>	User, Test - (testuser1)	<b>Email Address</b>	testuser@michigan.gov
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>State of Michigan Employee?</b>	Yes
<b>Organization</b>	Dept. of Health and Human Services-Health Services	<b>Date Submitted</b>	2/19/2020 11:58:00 AM
<b>Request Type</b>	New	<b>Request Term</b>	Annual

**Director Review - Business Objects Community (BOC)**

User Demographics

Review

Completed Review(s)

Immediate Manager Review (Hide Details)

Immediate Manager	Review Date	Reviewed By	Review Status	Review Comments
Nelson, Deon	2/19/2020 1:20:00 PM	Nelson, Deon	Approved	[comments as needed]

Report Manager Review (Hide Details)

Report	Report Manager	Review Date	Reviewed By	Review Status	Review Comments	Director Comments
EP001 - EPSDT Screening Contact Letter	Hambleton, Matthew	2/19/2020 1:51:00 PM	Hambleton, Matthew	Approved	[comments as needed]	
EP291 - EPSDT Screening Contact Listing	Hambleton, Matthew	2/19/2020 1:51:00 PM	Hambleton, Matthew	Approved	[comments as needed]	
MIHP01 - Maternal Risk Identifier	Frantz, Connie	2/19/2020 1:53:00 PM	Frantz, Connie	Approved	[comments as needed]	
MIHP02 - Infant Risk Identifier	Frantz, Connie	2/19/2020 1:53:00 PM	Frantz, Connie	Approved	[comments as needed]	

Once you have saved your review it cannot be changed; however, you may cancel and review later.

<b>Review Date</b>	2/19/2020 2:37:23 PM
<b>Review Status</b>	<input type="radio"/> Unreviewed <input checked="" type="radio"/> Approved <input type="radio"/> Denied
<b>Reviewer Comments</b>	<input type="text" value="[comments as needed]"/>

**Message**

**Action** [Save-Goto-Next](#) [Save-Goto-List](#) [Return-Some](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 3.4.7: Director Review

## 4 Finalizing the Access Request: Security Admin

The Security Administrator performs the final step to complete the access request. The Security Administrator does not make any access decisions, but rather, grants the already-approved access in the source application. First, the Security Administrator assigns the user’s approved security role(s) within the source application. Then, the Security Administrator returns to the DSA and marks the user’s access request as ‘Complete’, at which point the user is notified that their access has been granted.

Perform the following steps to complete the access request as the Security Administrator:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Review Requests** from the **Review** sub-menu (*Figure 4.1*).

-or-

Click Go To Review in the Requests Pending Review(s) dashboard.

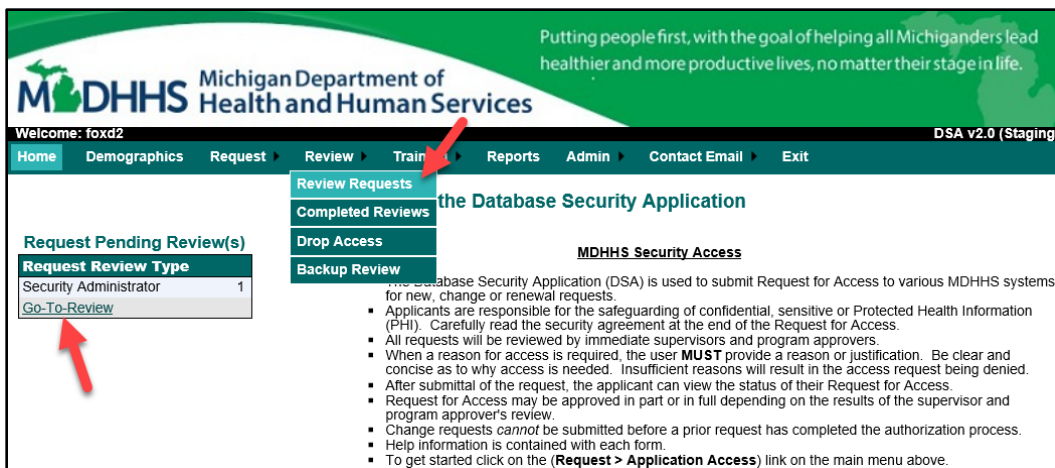


Figure 4.1: Home

3. Click Review beside the request to be reviewed (*Figure 4.2*). The Security Administrator page displays.

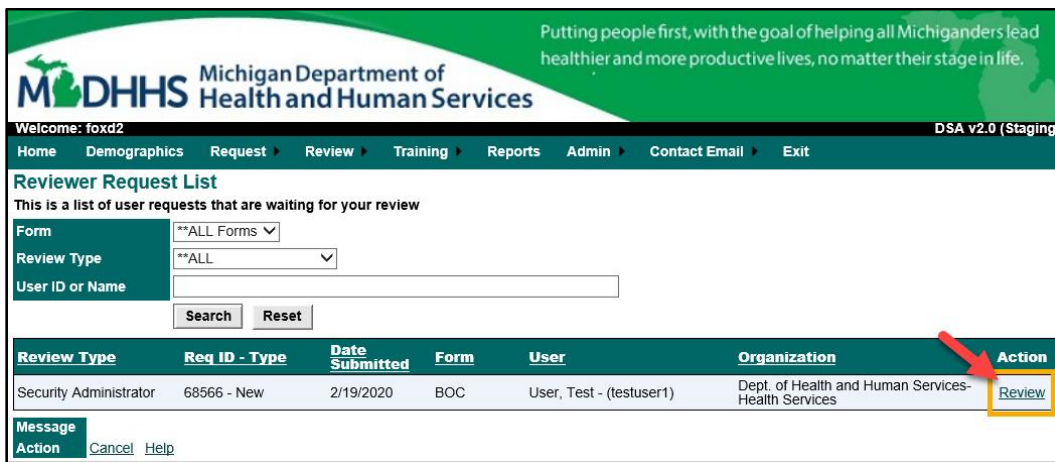
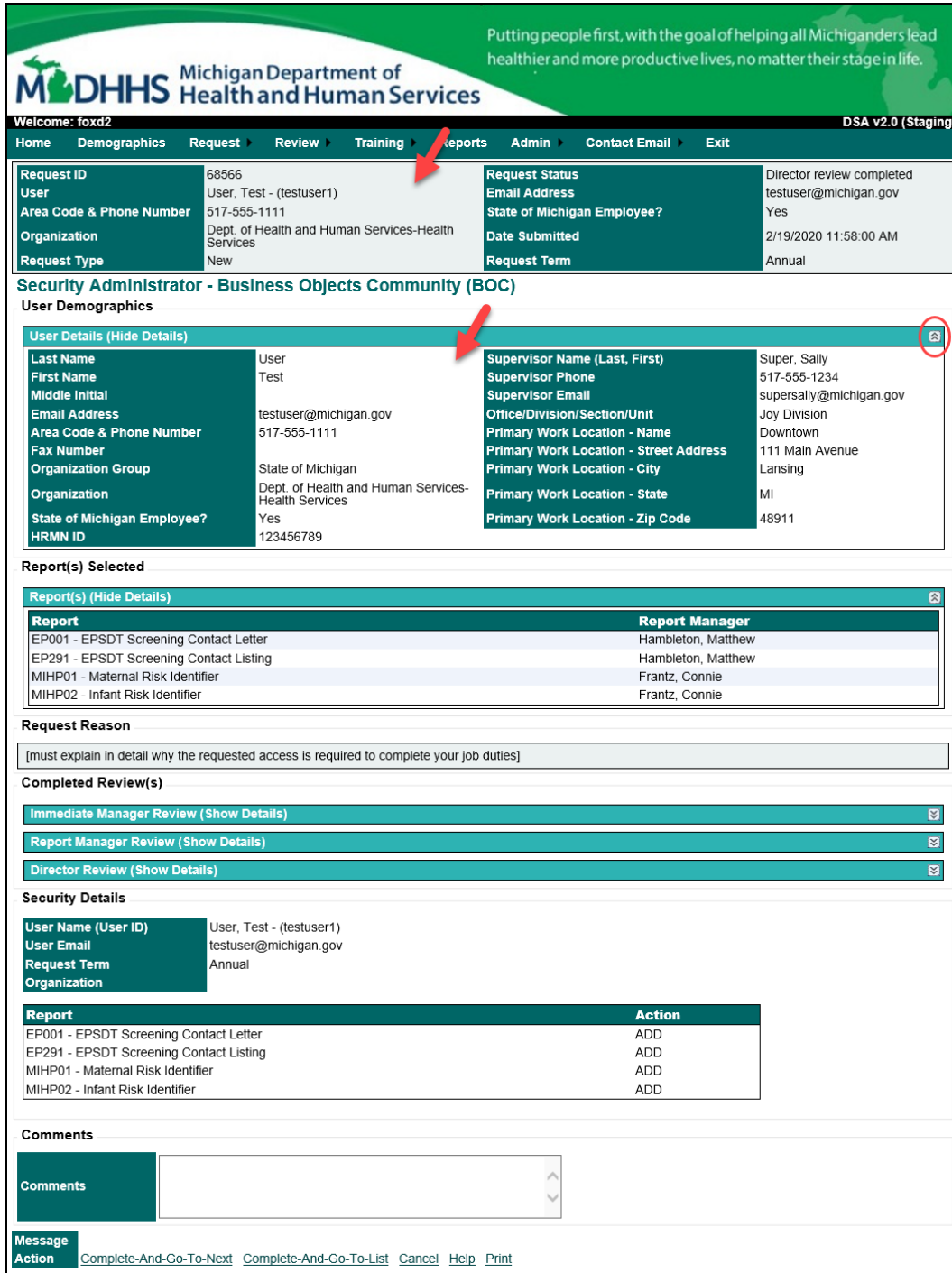


Figure 4.2: Reviewer Request List – Security Administrator

Note: Use the search fields (Figure 4.2, above) to locate the request, if necessary.

4. Verify the user information (Figure 4.3).
5. Click the arrow beside **User Details** to expand and review additional user demographics.



The screenshot displays the 'Security Administrator - Business Objects Community (BOC)' interface. At the top, there is a navigation menu with options: Home, Demographics, Request, Review, Training, Reports, Admin, Contact Email, and Exit. A red arrow points to the 'Reports' menu item.

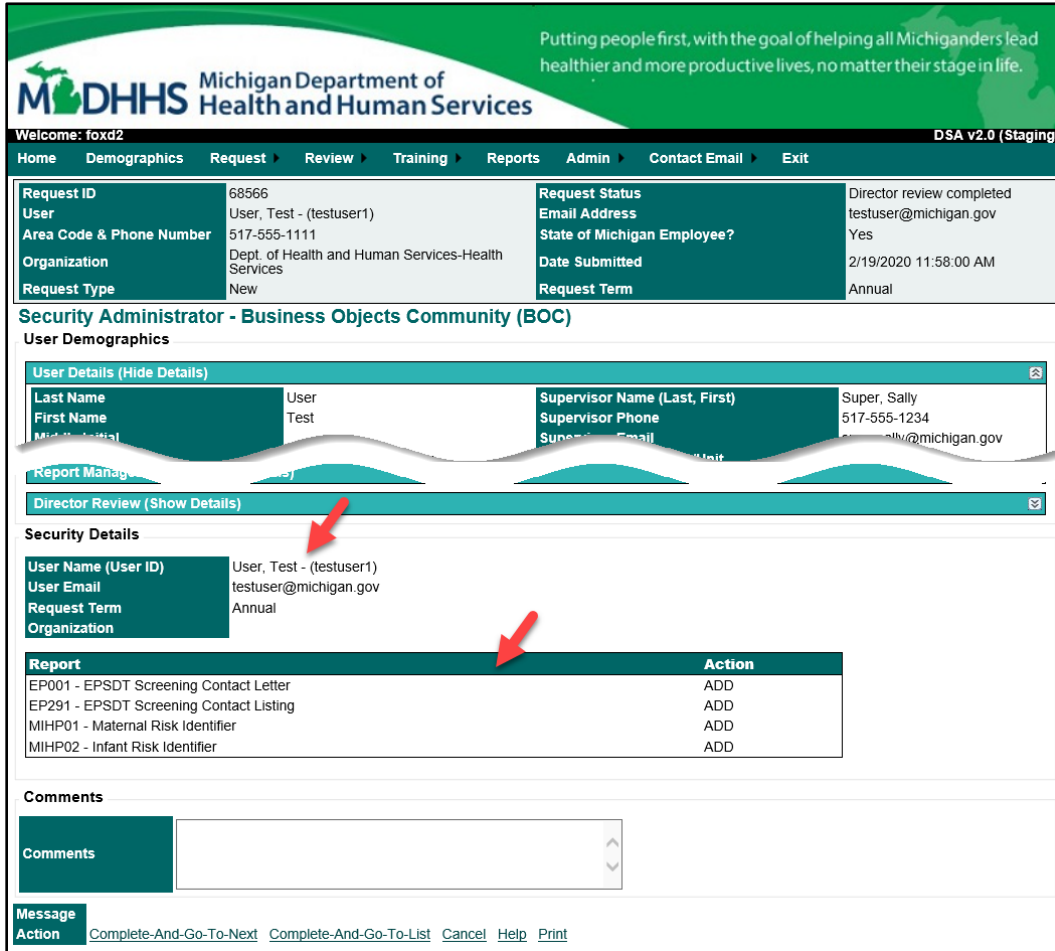
The main content area is divided into several sections:

- Request Information:** A table showing details for Request ID 68566, User 'User, Test - (testuser1)', and Request Status 'Director review completed'.
- User Demographics:** A section titled 'User Demographics' with a sub-section 'User Details (Hide Details)'. A red arrow points to the 'User Details' header, and a red circle highlights a collapse icon on the right. This section contains two columns of user information, including Last Name, First Name, Supervisor Name, and various work location details.
- Report(s) Selected:** A table listing selected reports such as 'EP001 - EPSDT Screening Contact Letter' and their respective managers.
- Request Reason:** A text field containing the instruction: '[must explain in detail why the requested access is required to complete your job duties]'
- Completed Review(s):** A list of review actions including 'Immediate Manager Review', 'Report Manager Review', and 'Director Review', each with a 'Show Details' link.
- Security Details:** A table showing 'User Name (User ID)', 'User Email', 'Request Term', and 'Organization'.
- Action Table:** A table with columns 'Report' and 'Action', listing reports like 'EP001 - EPSDT Screening Contact Letter' with an 'ADD' action.
- Comments:** A text area for entering comments.
- Message Action:** A row of buttons: Complete-And-Go-To-Next, Complete-And-Go-To-List, Cancel, Help, and Print.

Figure 4.3: Security Administrator

**IMPORTANT:** The details crucial to finalizing the access request are located at the bottom in the **Security Details** section.

6. Under **Security Details** take note of the **User Name** and **User ID**, along with the security roles that were approved for the user (seen as **Reports** in Figure 4.4 example).



The screenshot shows the 'Security Administrator - Business Objects Community (BOC)' interface. At the top, there is a navigation bar with options: Home, Demographics, Request, Review, Training, Reports, Admin, Contact Email, and Exit. Below this is a summary table for the request:

Request ID	68566	Request Status	Director review completed
User	User, Test - (testuser1)	Email Address	testuser@michigan.gov
Area Code & Phone Number	517-555-1111	State of Michigan Employee?	Yes
Organization	Dept. of Health and Human Services-Health Services	Date Submitted	2/19/2020 11:58:00 AM
Request Type	New	Request Term	Annual

Below the summary table, there are sections for 'User Demographics' and 'Security Details'. The 'Security Details' section contains the following information:

User Name (User ID)	User, Test - (testuser1)
User Email	testuser@michigan.gov
Request Term	Annual
Organization	

Under 'Security Details', there is a table of reports:

Report	Action
EP001 - EPSDT Screening Contact Letter	ADD
EP291 - EPSDT Screening Contact Listing	ADD
MIHP01 - Maternal Risk Identifier	ADD
MIHP02 - Infant Risk Identifier	ADD

At the bottom of the interface, there is a 'Comments' section with a text input field and a 'Message Action' bar with options: Complete-And-Go-To-Next, Complete-And-Go-To-List, Cancel, Help, and Print.

Figure 4.4: Security Administrator

7. Grant the approved access in the source application (e.g., CareConnect360, CHAMPS):
  - a. Access the source application for which the security access was approved.
  - b. Follow the source application's procedures for granting access and assigning approved security roles.
  - c. When complete, return to the DSA.

8. Only after the access has been granted in the source application, enter detailed **Comments** (Figure 4.5) **about completing the access assignment in the source application.**
9. Click Complete And Go To Next to mark the access request complete, then advance to the next request awaiting finalization.

-or-

Click Complete And Go To List to mark the access request complete and return to the list of requests awaiting finalization.

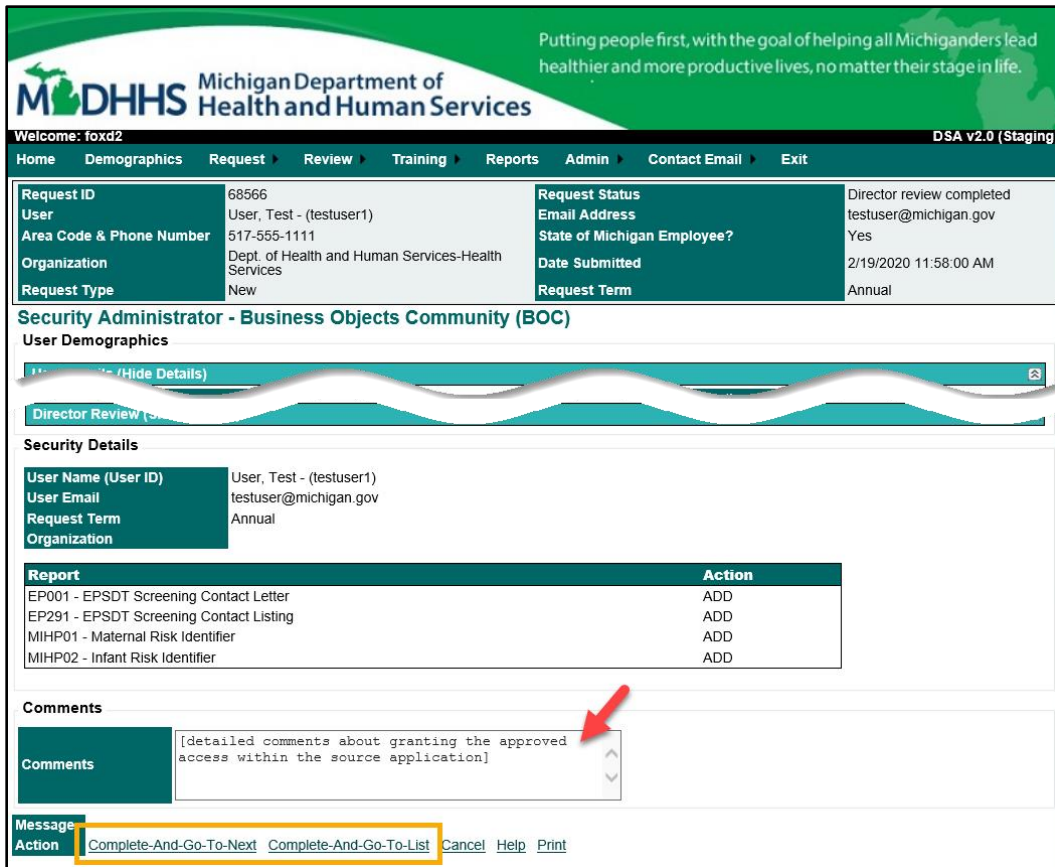


Figure 4.5: Security Administrator

**Note:** Upon completion, the user receives notification of their approved access being granted.

## 5 Periodically Reviewing Privileged Access

---

Some application access is considered Privileged Access and requires increased security protocol including periodic access reviews (PARs). Each application's access request Form Administrator determines which Privileged Access roles exist.

The Privileged Access roles are then communicated and coordinated between the Form Administrator and Optum, who perform the necessary actions to mark the role as 'privileged' within the Database Security Application (DSA). Please contact Optum for further coordination information. In limited instances, Privileged Access roles are identified by the Immediate Manager or Sponsor by selecting **Force PAR** during the review and approval cycle.

### 5.1 Periodic Access Reviews: Immediate Manager

Once marked, if a Privileged Access role requires a six-month (for example) periodic access review, the PAR is automatically created at the five-month mark and an email notification is sent to the Immediate Manager who approved the current privileged access.

*The Immediate Manager is required to access the PAR request and re-approve the privileged access if still valid, or deny if the privileged access is no longer needed. If denied or not re-approved within an appropriate amount of time, a Drop Access request is automatically created to remove the privileged access.*

*Note:* Detailed instruction for completing a periodic access review as the Immediate Manager begins on the next page.

Perform the following steps to complete a Periodic Access Review (PAR) as the Immediate Manager:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Review Requests** from the **Review** sub-menu (*Figure 5.1.1*).  
 -or-  
 Click Go To Review in the Request Pending Review(s) dashboard.

*Note:* The Immediate Manager’s Request Pending Review(s) dashboard also includes a ‘PAR Immediate Manager’ **Request Review Type** and displays the associated number of PAR reviews pending (*Figure 5.1.1*).

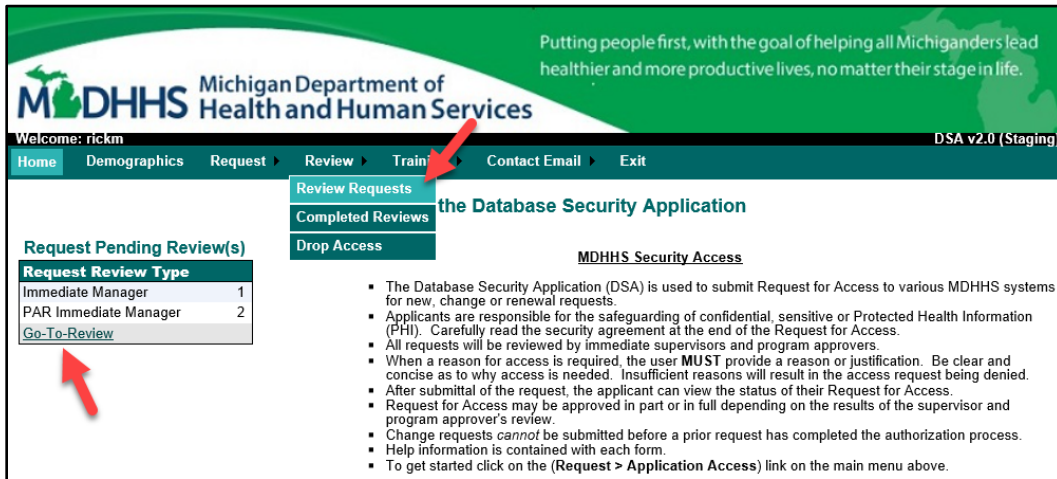


Figure 5.1.1: Home – Immediate Manager

3. Click Review beside the PAR request to be reviewed (*Figure 5.1.2*). The Immediate Manager Periodic Access Review page displays.

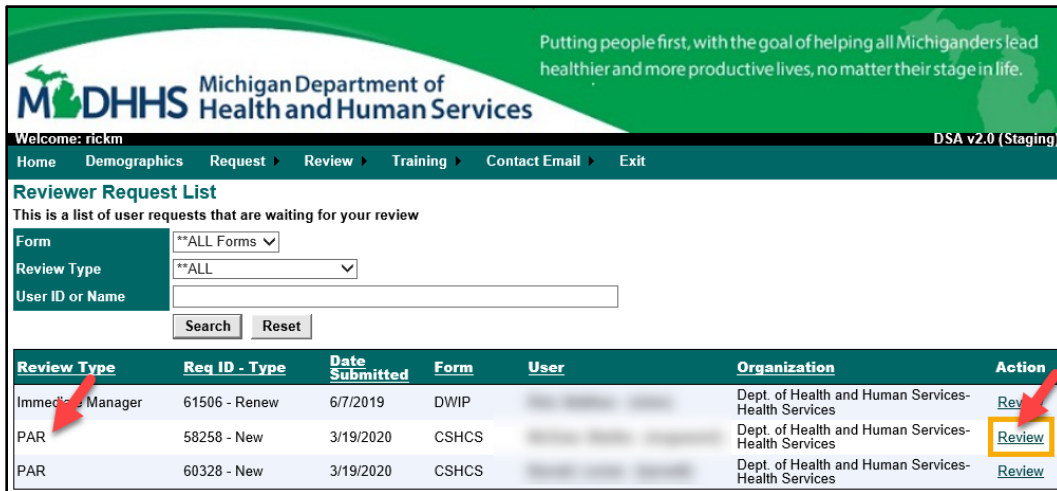
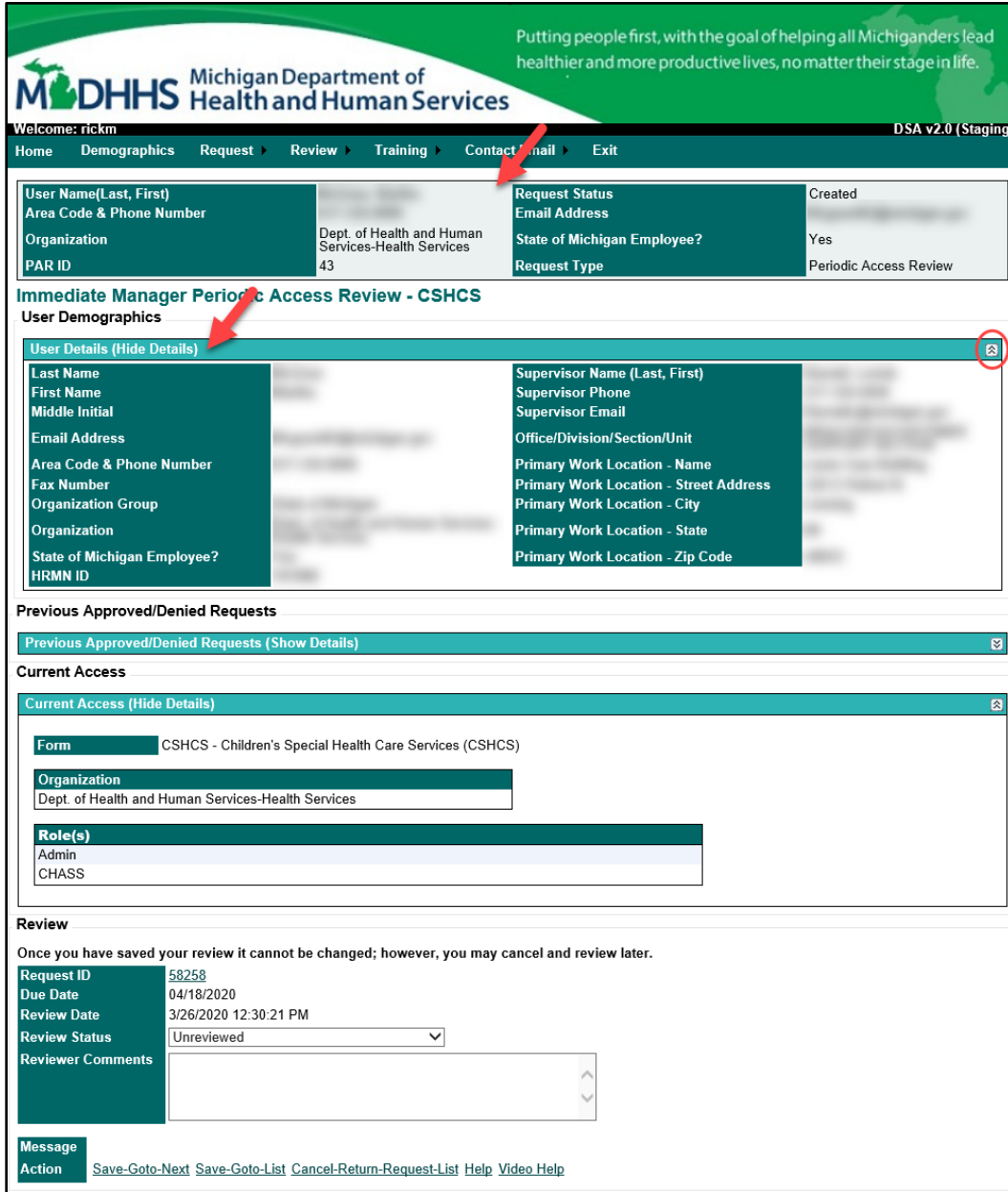


Figure 5.1.2: Reviewer Request List – Immediate Manager

- Verify the user information (Figure 5.1.3).
- Click the arrow beside **User Details** (red circle) to expand and review additional user demographics.



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**MDHHS** Michigan Department of Health and Human Services  
 Welcome: rickm DSA v2.0 (Staging)

[Home](#) [Demographics](#) [Request](#) [Review](#) [Training](#) [Contact Us](#) [Exit](#)

User Name (Last, First)	Request Status	Created
Area Code & Phone Number	Email Address	
Organization	State of Michigan Employee?	Yes
PAR ID	Request Type	Periodic Access Review

**Immediate Manager Periodic Access Review - CSHCS**

**User Demographics**

[User Details \(Hide Details\)](#) ⊞

Last Name	Supervisor Name (Last, First)
First Name	Supervisor Phone
Middle Initial	Supervisor Email
Email Address	Office/Division/Section/Unit
Area Code & Phone Number	Primary Work Location - Name
Fax Number	Primary Work Location - Street Address
Organization Group	Primary Work Location - City
Organization	Primary Work Location - State
State of Michigan Employee?	Primary Work Location - Zip Code
HRMN ID	

**Previous Approved/Denied Requests**

[Previous Approved/Denied Requests \(Show Details\)](#) ⊞

**Current Access**

[Current Access \(Hide Details\)](#) ⊞

<b>Form</b>	CSHCS - Children's Special Health Care Services (CSHCS)
<b>Organization</b>	Dept. of Health and Human Services-Health Services
<b>Role(s)</b>	Admin CHASS

**Review**

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request ID	58258
Due Date	04/18/2020
Review Date	3/26/2020 12:30:21 PM
Review Status	Unreviewed
Reviewer Comments	

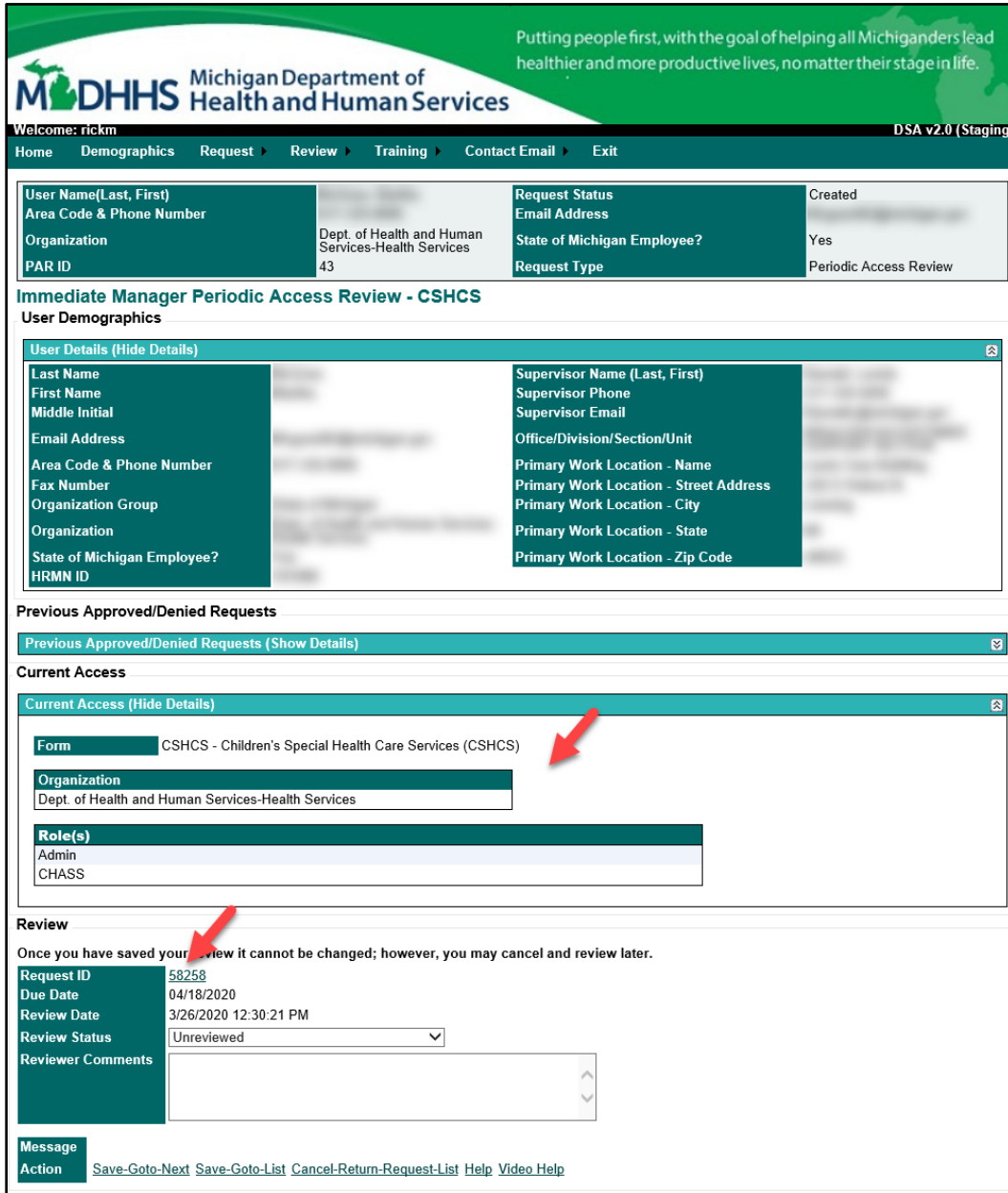
**Message**

Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 5.1.3: Immediate Manager Periodic Access Review



- Under **Current Access** take note of the user’s current approved Privileged Access details (Figure 5.1.4).
- Under **Review** the **Request ID** is a link. Click the link to review the original request and review/approval cycle for the Privileged Access role (see Figure 5.1.5, next page).



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**MDHHS** Michigan Department of Health and Human Services

Welcome: rickm DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

User Name (Last, First)	Request Status	Created
Area Code & Phone Number	Email Address	
Organization	State of Michigan Employee?	Yes
PAR ID	Request Type	Periodic Access Review

**Immediate Manager Periodic Access Review - CSHCS**

User Demographics

User Details (Hide Details)

Last Name	Supervisor Name (Last, First)
First Name	Supervisor Phone
Middle Initial	Supervisor Email
Email Address	Office/Division/Section/Unit
Area Code & Phone Number	Primary Work Location - Name
Fax Number	Primary Work Location - Street Address
Organization Group	Primary Work Location - City
Organization	Primary Work Location - State
State of Michigan Employee?	Primary Work Location - Zip Code
HRMN ID	

Previous Approved/Denied Requests

Previous Approved/Denied Requests (Show Details)

Current Access

Current Access (Hide Details)

Form CSHCS - Children's Special Health Care Services (CSHCS)

Organization Dept. of Health and Human Services-Health Services

Role(s)

Admin  
CHASS

Review

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request ID [58258](#)

Due Date 04/18/2020

Review Date 3/26/2020 12:30:21 PM

Review Status Unreviewed

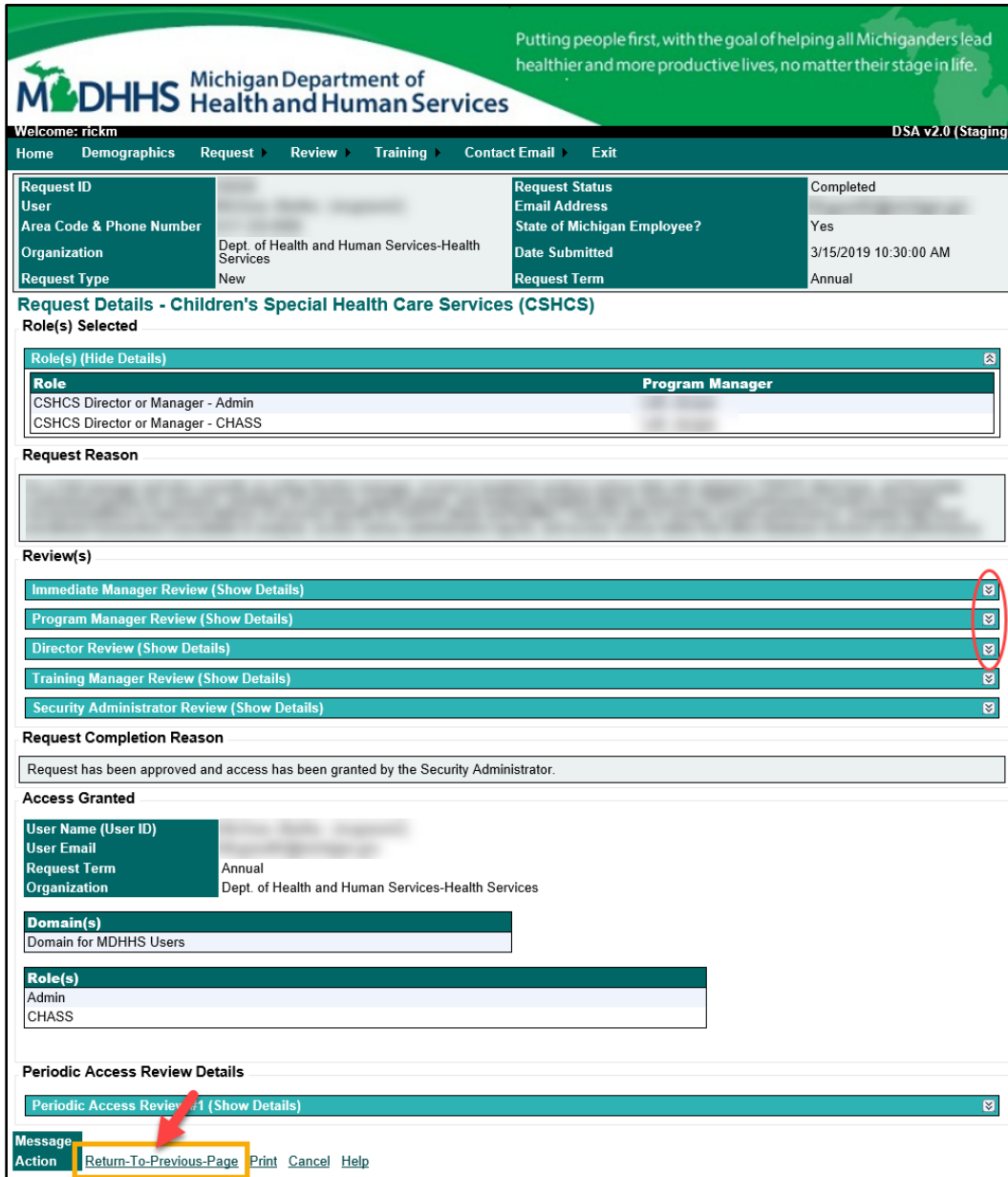
Reviewer Comments

Message

Action [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 5.1.4: Immediate Manager Periodic Access Review

8. In the original request (*Figure 5.1.5*), click the arrow beside each review level to expand the details and review the previous Privileged Access role approvals as needed.
9. When complete, click [Return To Previous Page](#) to return to the PAR request.



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Michigan Department of Health and Human Services

Welcome: rickm DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

Request ID		Request Status	Completed
User		Email Address	
Area Code & Phone Number		State of Michigan Employee?	Yes
Organization	Dept. of Health and Human Services-Health Services	Date Submitted	3/15/2019 10:30:00 AM
Request Type	New	Request Term	Annual

**Request Details - Children's Special Health Care Services (CSHCS)**

Role(s) Selected

Role(s) (Hide Details)

<b>Role</b>	<b>Program Manager</b>
CSHCS Director or Manager - Admin	
CSHCS Director or Manager - CHASS	

Request Reason

Review(s)

- Immediate Manager Review (Show Details)
- Program Manager Review (Show Details)
- Director Review (Show Details)
- Training Manager Review (Show Details)
- Security Administrator Review (Show Details)

Request Completion Reason

Request has been approved and access has been granted by the Security Administrator.

Access Granted

User Name (User ID)	
User Email	
Request Term	Annual
Organization	Dept. of Health and Human Services-Health Services

Domain(s)

Domain for MDHHS Users

Role(s)

Admin  
CHASS

Periodic Access Review Details

Periodic Access Review #1 (Show Details)

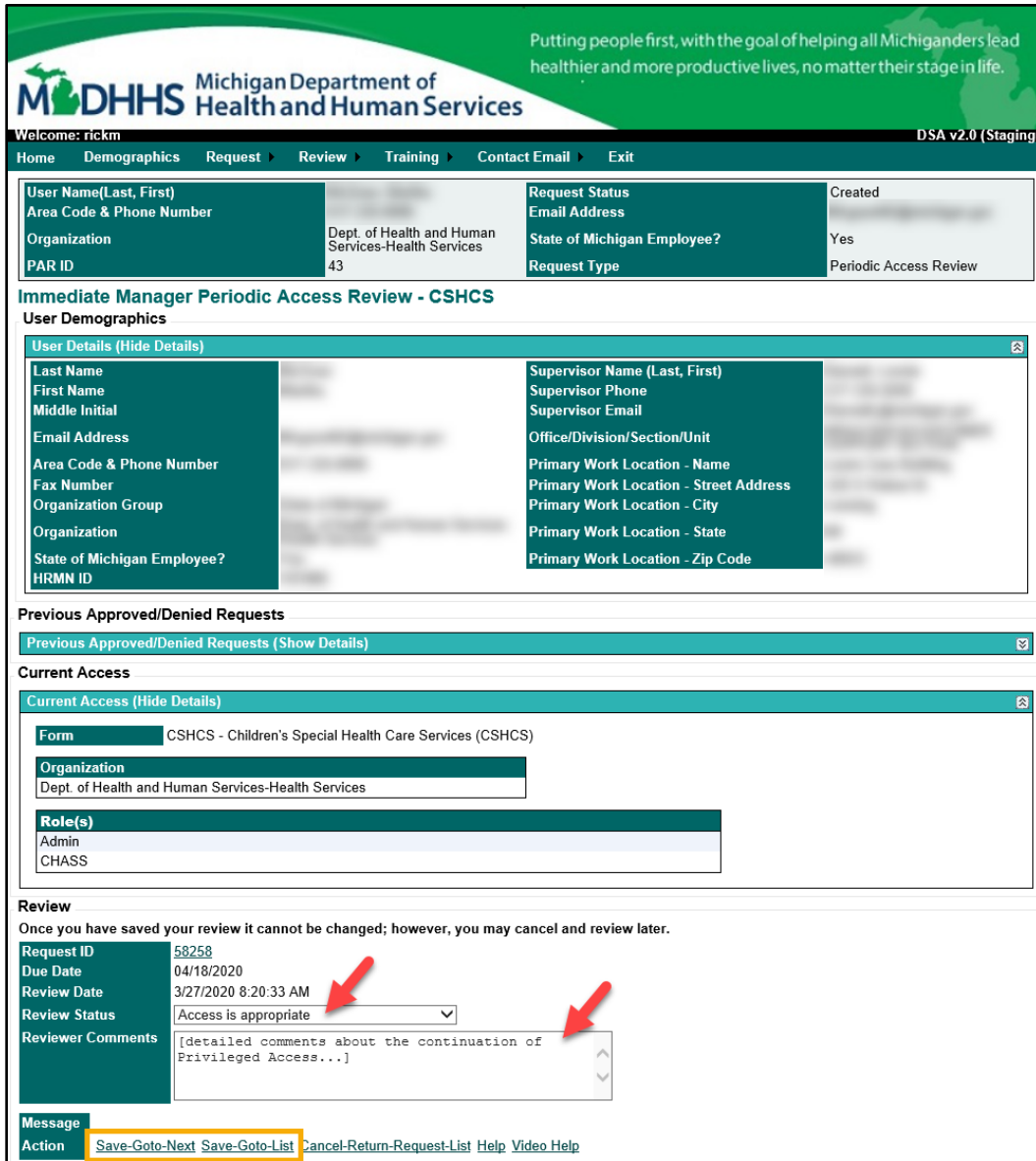
Message Action [Return-To-Previous-Page](#) Print Cancel Help

Figure 5.1.5: Original Privileged Access Role Request

10. To complete the PAR request, select the **Review Status** (*Figure 5.1.6*). Please see [Table 5.1.1](#) for the resulting actions. Review statuses include:
  - Access is appropriate
  - Access needs have changed
  - Remove access – Retired

- Remove access – No longer my employee
- Remove access – Job duties changed
- Reassign – Transfer
- Reassign – Transfer Not Found

11. Enter detailed **Reviewer Comments** about the status selected.



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Welcome: rickm DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

User Name (Last, First)		Request Status	Created
Area Code & Phone Number		Email Address	
Organization	Dept. of Health and Human Services-Health Services	State of Michigan Employee?	Yes
PAR ID	43	Request Type	Periodic Access Review

**Immediate Manager Periodic Access Review - CSHCS**

**User Demographics**

User Details (Hide Details)

Last Name		Supervisor Name (Last, First)	
First Name		Supervisor Phone	
Middle Initial		Supervisor Email	
Email Address		Office/Division/Section/Unit	
Area Code & Phone Number		Primary Work Location - Name	
Fax Number		Primary Work Location - Street Address	
Organization Group		Primary Work Location - City	
Organization		Primary Work Location - State	
State of Michigan Employee?		Primary Work Location - Zip Code	
HRMN ID			

**Previous Approved/Denied Requests**

Previous Approved/Denied Requests (Show Details)

**Current Access**

Current Access (Hide Details)

Form	CSHCS - Children's Special Health Care Services (CSHCS)
Organization	Dept. of Health and Human Services-Health Services
Role(s)	Admin CHASS

**Review**

Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request ID	58258
Due Date	04/18/2020
Review Date	3/27/2020 8:20:33 AM
Review Status	Access is appropriate
Reviewer Comments	[detailed comments about the continuation of Privileged Access...]

Message

Action [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 5.1.6: Immediate Manager Periodic Access Review

12. Click Save Goto Next to save the PAR, advance to the next request awaiting review.

-or-

Click Save Goto List to save the PAR and return to the list of requests awaiting review.

PAR Review Status Selected	Resulting Action
Access is appropriate	No change to the user’s current Privileged Access role, the privileged access continues
Access needs have changed	Automatically generates a Change request which the user must complete according to their new access needs
Remove access – Retired	Automatically generates a Drop Access request informing the Security Administrator to terminate the Privileged Access in the source system
Remove access – No longer my employee	Automatically generates a Drop Access request informing the Security Administrator to terminate the Privileged Access in the source system
Remove access – Job duties changed	Automatically generates a Drop Access request informing the Security Administrator to terminate the Privileged Access in the source system
Reassign – Transfer	Allows selection of the new <b>Immediate Manager</b> , then transfers the PAR and sends email notification to the new Immediate Manager
Reassign – Transfer Not Found	When the new Immediate Manager cannot be found allows selection of the <b>Form Administrator</b> , then transfers the PAR and sends email notification to the Form Administrator for PAR resolution

Table 5.1.1: PAR Review Statuses

## 5.2 Periodic Access Reviews: Form Administrator

Form Administrators can manage their application’s PARs using the Request Maintenance page. In addition to the statuses available to the Immediate Manager, the Form Administrator can select to close a PAR or extend the due date for a PAR.

Complete the following steps to manage Periodic Access Requests (PARs) as the Form Administrator:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Request Maintenance** from the **Admin** sub-menu (*Figure 5.2.1*).

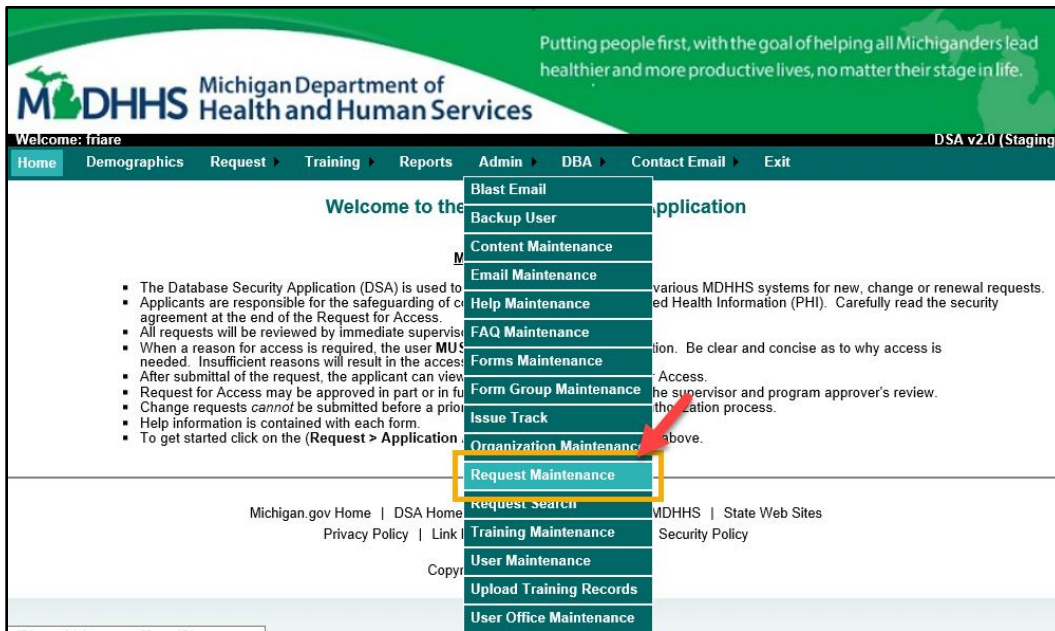


Figure 5.2.1: Admin – Request Maintenance

3. Click the **Periodic Access Reviews** tab (*Figure 5.2.2*).
4. Click View beside the PAR request to be reviewed. The Periodic Access Review page displays.

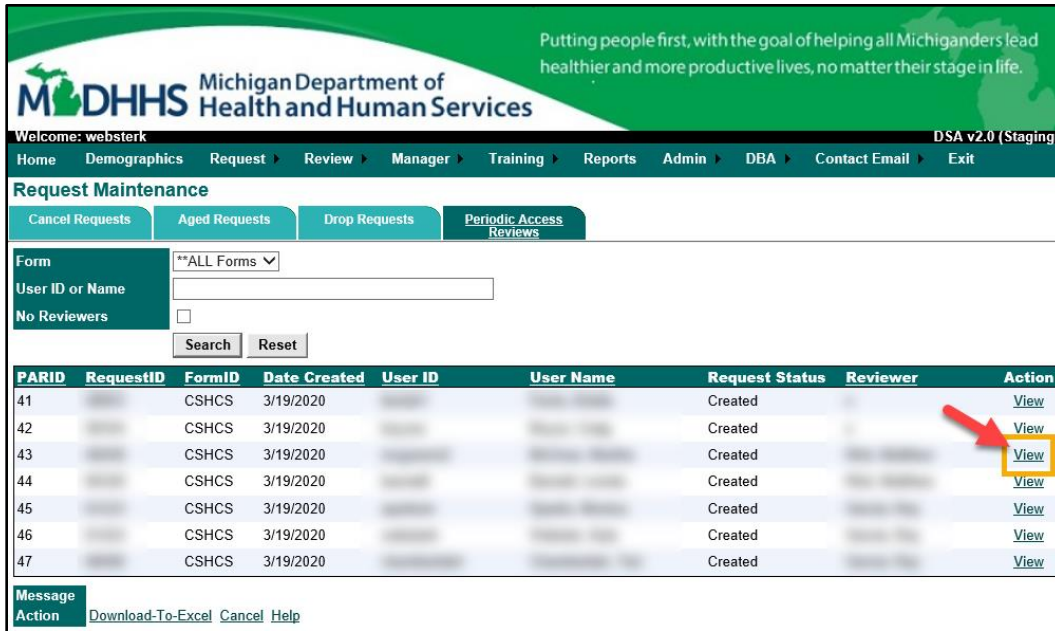


Figure 5.2.2: Request Maintenance – Periodic Access Reviews

5. Verify the user information (*Figure 5.2.3*).
6. Click the arrow beside **User Details** (*red circle*) to expand and review additional user demographics.

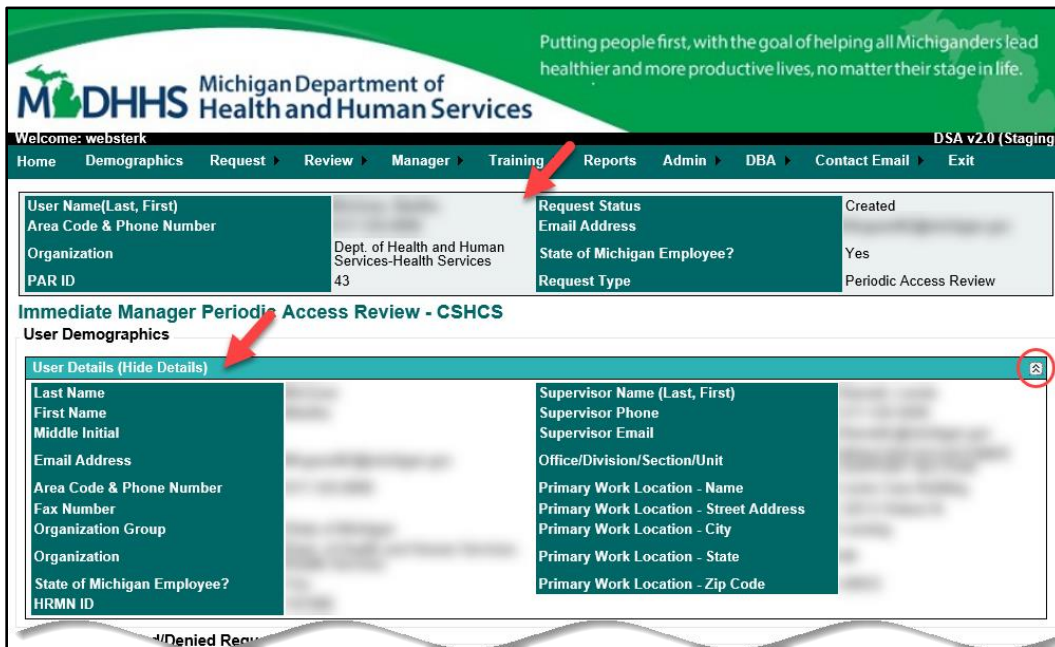
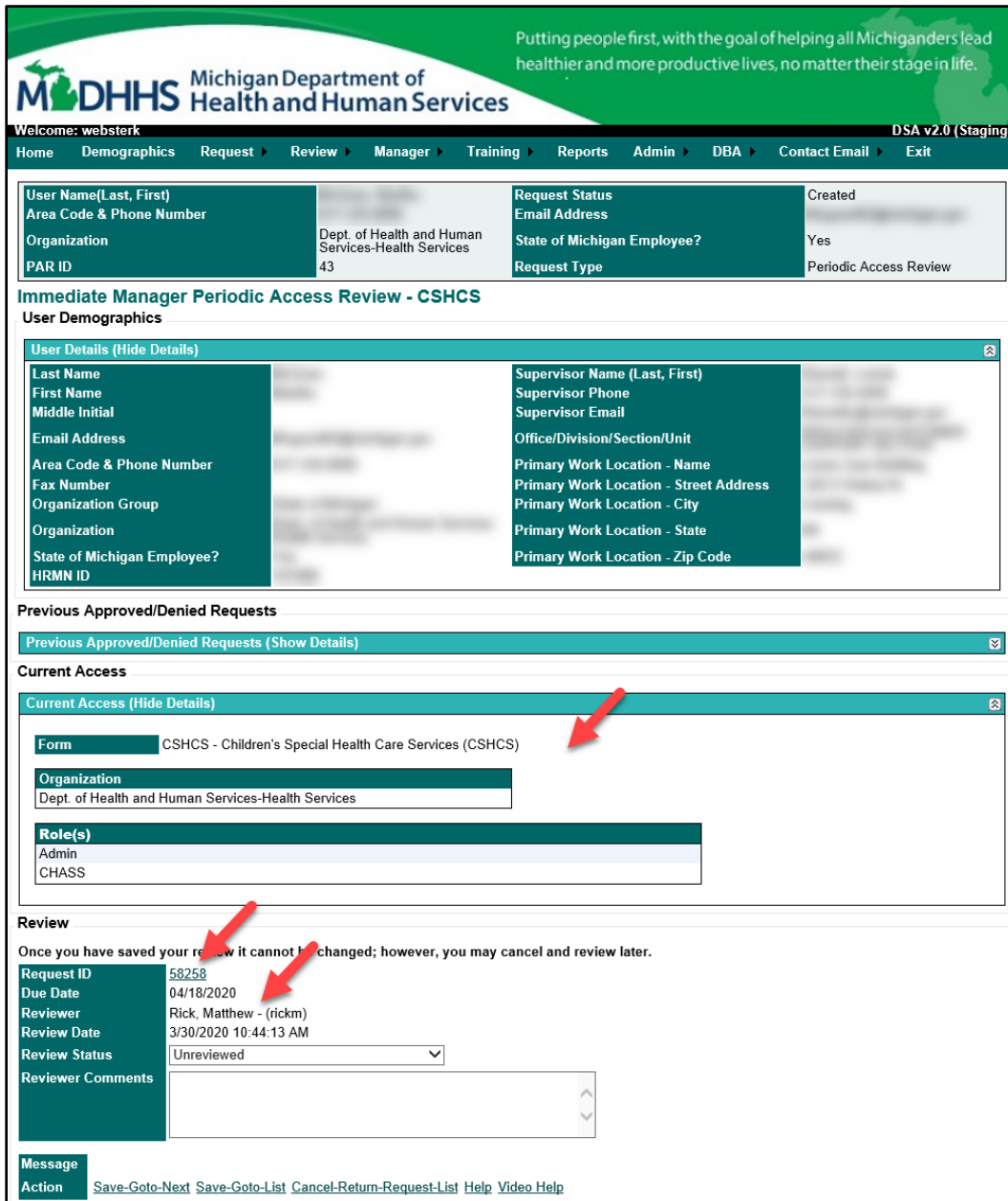


Figure 5.2.3: Periodic Access Review – Form Administration

7. Under **Current Access** take note of the user’s current approved Privileged Access details (Figure 5.2.4).
8. Under **Review** the **Request ID** is a link. If necessary, click the link to review the original Privileged Access role request and review/approval cycle.
9. Note the PAR’s **Due Date** and **Reviewer**. The Reviewer is the Immediate Manager who originally approved the privileged access.



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Welcome: websterk DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Reports Admin DBA Contact Email Exit

User Name (Last, First)		Request Status	Created
Area Code & Phone Number		Email Address	
Organization	Dept. of Health and Human Services-Health Services	State of Michigan Employee?	Yes
PAR ID	43	Request Type	Periodic Access Review

**Immediate Manager Periodic Access Review - CSHCS**

**User Demographics**

User Details (Hide Details)

Last Name		Supervisor Name (Last, First)	
First Name		Supervisor Phone	
Middle Initial		Supervisor Email	
Email Address		Office/Division/Section/Unit	
Area Code & Phone Number		Primary Work Location - Name	
Fax Number		Primary Work Location - Street Address	
Organization Group		Primary Work Location - City	
Organization		Primary Work Location - State	
State of Michigan Employee?		Primary Work Location - Zip Code	
HRMN ID			

**Previous Approved/Denied Requests**

Previous Approved/Denied Requests (Show Details)

**Current Access**

Current Access (Hide Details)

**Form** CSHCS - Children's Special Health Care Services (CSHCS)

**Organization**  
Dept. of Health and Human Services-Health Services

**Role(s)**  
Admin  
CHASS

**Review**

Once you have saved your review it cannot be changed; however, you may cancel and review later.

**Request ID** 58258

**Due Date** 04/18/2020

**Reviewer** Rick, Matthew - (rickm)

**Review Date** 3/30/2020 10:44:13 AM

**Review Status** Unreviewed

**Reviewer Comments**

**Message**

Action: [Save-Goto-Next](#) [Save-Goto-List](#) [Cancel-Return-Request-List](#) [Help](#) [Video Help](#)

Figure 5.2.4: Periodic Access Review – Form Administrator

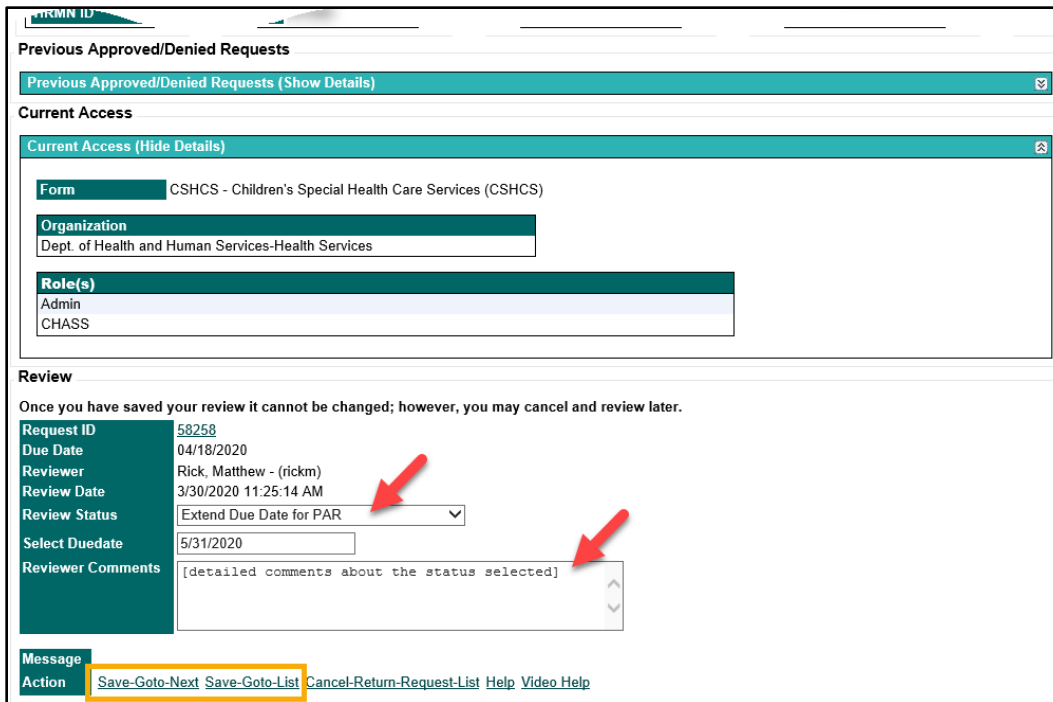
10. To complete the PAR request or extend the PAR’s due date, select the appropriate **Review Status** (Figure 5.2.5). Please see [Table 5.2.1](#) for the resulting actions. Statuses include:

- Access is appropriate
- Access needs have changed
- Remove access – Retired
- Remove access – No longer my employee
- Remove access – Job duties changed
- Reassign – Transfer
- Reassign – Transfer Not Found
- Close PAR
- Extend Due Date for PAR

11. If selecting the **Review Status**:

- a. ‘Reassign – Transfer’ select the new **Immediate Manager** to which the PAR is to be transferred.
- b. ‘Reassign – Transfer Not Found’ select the **Form Administrator** to perform the PAR resolution.
- c. ‘Extend Due Date for PAR’ **Select (the new) Due Date** for the PAR.

12. Enter detailed **Reviewer Comments** about the status selected.



**Previous Approved/Denied Requests**  
 Previous Approved/Denied Requests (Show Details)

**Current Access**  
 Current Access (Hide Details)

**Form** CSHCS - Children's Special Health Care Services (CSHCS)  
**Organization** Dept. of Health and Human Services-Health Services  
**Role(s)** Admin, CHASS

**Review**  
 Once you have saved your review it cannot be changed; however, you may cancel and review later.

Request ID: 58258  
 Due Date: 04/18/2020  
 Reviewer: Rick, Matthew - (rickm)  
 Review Date: 3/30/2020 11:25:14 AM  
 Review Status: Extend Due Date for PAR  
 Select Duedate: 5/31/2020  
 Reviewer Comments: [detailed comments about the status selected]

**Message**  
 Action: Save-Goto-Next Save-Goto-List Cancel-Return-Request-List Help Video Help

Figure 5.2.5: Periodic Access Review – Form Administration



13. Click Save Goto Next to save the PAR, advance to the next request awaiting review.

-or-

Click Save Goto List to save the PAR and return to the list of requests awaiting review.

PAR Review Status Selected	Resulting Action
Access is appropriate	No change to the user’s current Privileged Access role, the privileged access continues
Access needs have changed	Automatically generates a Change request which the user must complete according to their new access needs
Remove access – Retired	Automatically generates a Drop Access request informing the Security Administrator to terminate the Privileged Access in the source system
Remove access – No longer my employee	Automatically generates a Drop Access request informing the Security Administrator to terminate the Privileged Access in the source system
Remove access – Job duties changed	Automatically generates a Drop Access request informing the Security Administrator to terminate the Privileged Access in the source system
Reassign – Transfer	Allows selection of the new <b>Immediate Manager</b> , then transfers the PAR and sends email notification to the new Immediate Manager
Reassign – Transfer Not Found	When the new Immediate Manager cannot be found allows selection of the <b>Form Administrator</b> , then transfers the PAR and sends email notification to the Form Administrator for PAR resolution
Close PAR	No change to the user’s current Privileged Access role, the privileged access continues
Extend Due Date for PAR	Allows the Form Administrator to <b>Select (a) Due Date</b> to extend a PAR that cannot be completed by the initially-assigned due date

Table 5.2.1: PAR Review Statuses

## 6 Dropping Users: Access Termination

When a user’s need for access to an application ceases the Immediate Manager, the Organization Manager, and the application’s access request Form Administrator have the ability to generate a drop access request within the DSA. This action notifies the application’s Security Administrator to review the drop access request and terminate the user’s access in the source application (e.g., CareConnect360, CHAMPS, MiSACWIS).

At times it may be necessary to generate drop access requests for multiple users at once. The application’s Form Administrator has the added ability to upload a Microsoft Excel © spreadsheet containing multiple users that need their access terminated. Uploading the file generates drop access requests for each user on the spreadsheet.

### 6.1 Generate a Drop Access Request

Complete the following steps to generate a drop access request:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Drop Access** from the **Review** sub-menu (*Figure 6.1.1*). The Drop User Access page displays.

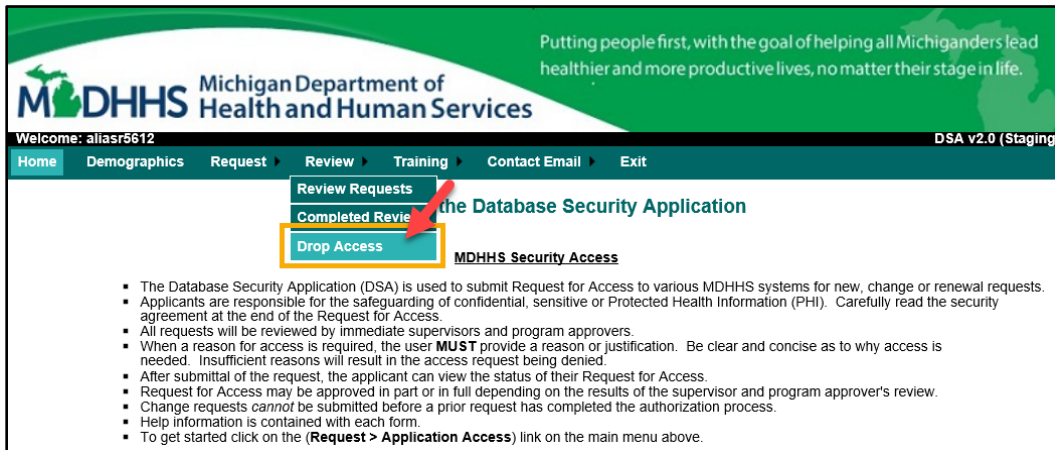


Figure 6.1.1: Home

3. Click Generate Drop Access Request (Figure 6.1.2). The Drop Access Confirmation window displays.

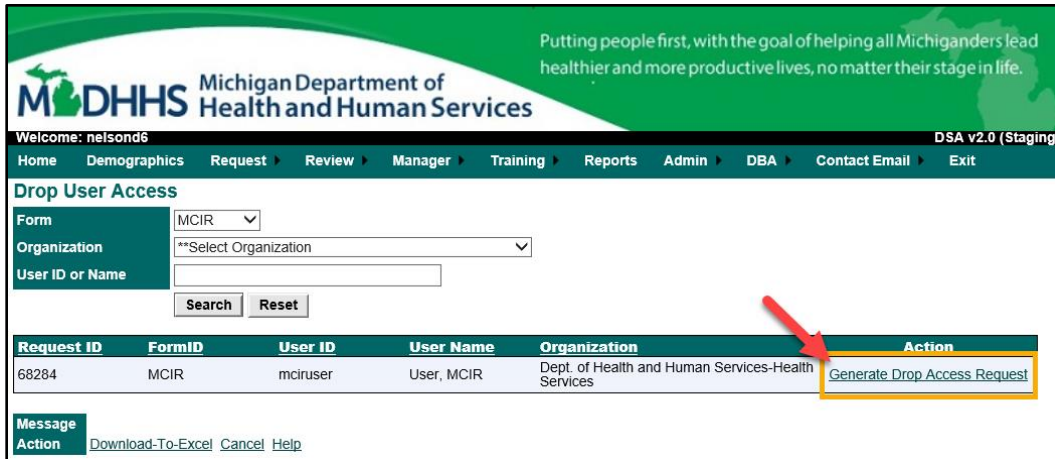


Figure 6.1.2: Drop User Access

4. Enter a detailed **Reason** for terminating/dropping the user’s access (Figure 6.1.3).
5. Click Confirm. The application’s Security Administrator is notified by email to review the drop access request and terminate the user’s access in the source application.

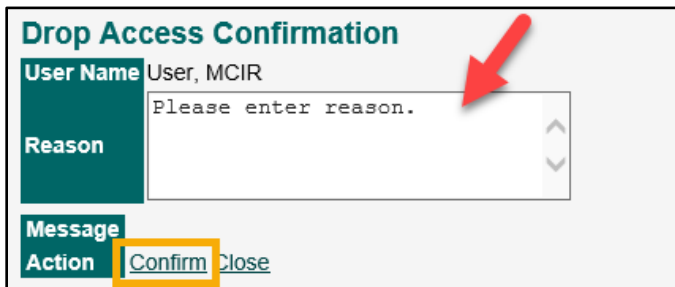


Figure 6.1.3: Drop Access Confirmation

## 6.2 Complete a Drop Access Request

When an Immediate Manager, Organization Manager, or the application’s access request Form Administrator generates a drop access request within the DSA, the application’s Security Administrator receives email notification with the subject line: **Drop Access - <application name> Request to Review as Security Administrator**. This email instructs them to review the drop access request, and terminate the user’s access as appropriate.

To carry out the request, the Security Administrator first terminates the user’s access in the source application (e.g., CareConnect360, CHAMPS, MiSACWIS). *After completing the termination in the source application, the Security Administrator returns to the DSA to document the termination thus completing the drop access process.*

Complete the following steps to drop a user’s access as the Security Administrator:

1. Complete the steps in [1.4 Accessing the DSA](#).
  2. Select **Review Requests** from the **Review** sub-menu (*Figure 6.2.1*).
- or-**
- Click Go To Review in the Request Pending Review(s) dashboard.

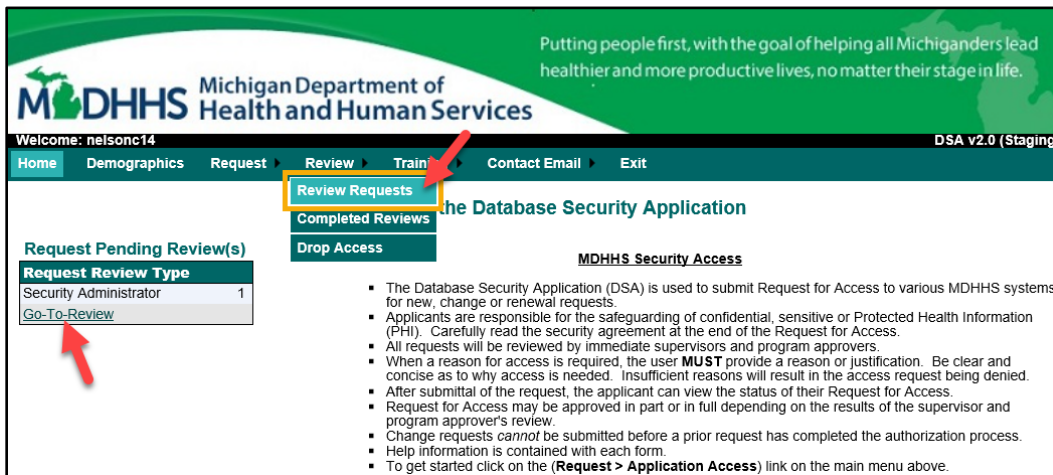
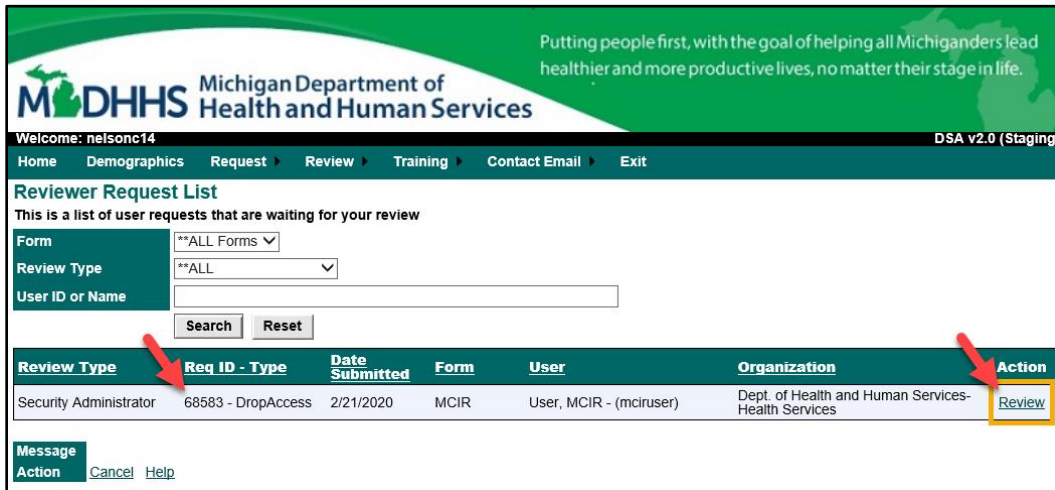


Figure 6.2.1: Home – Review – Review Requests

3. Click Review beside the ‘DropAccess’ request to be reviewed (*Figure 6.2.2*). The Security Administrator page displays.



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Michigan Department of Health and Human Services

Welcome: nelsonc14 DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

**Reviewer Request List**  
 This is a list of user requests that are waiting for your review

Form: **\*\*ALL Forms**  
 Review Type: **\*\*ALL**  
 User ID or Name:

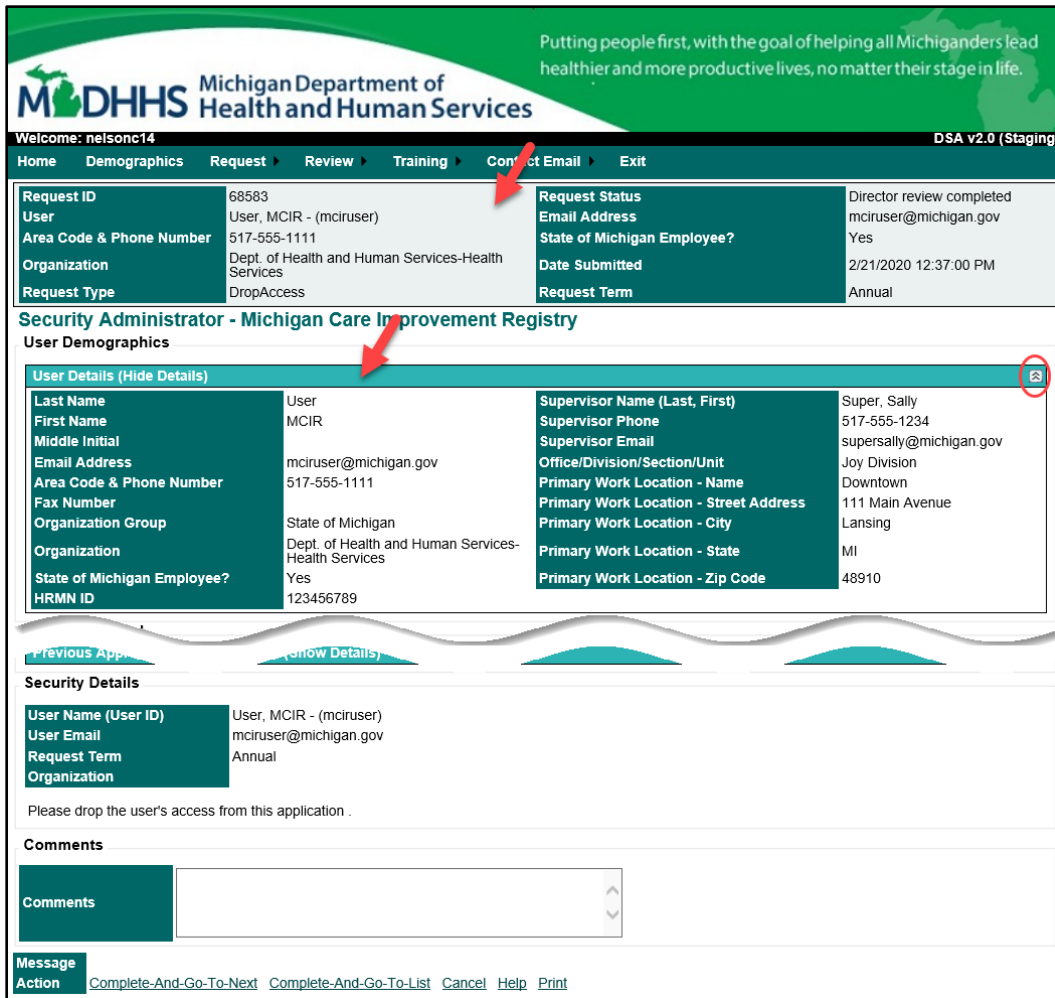
Search Reset

Review Type	Req ID - Type	Date Submitted	Form	User	Organization	Action
Security Administrator	68583 - DropAccess	2/21/2020	MCIR	User, MCIR - (mcruser)	Dept. of Health and Human Services-Health Services	Review

Message Action Cancel Help

Figure 6.2.2: Reviewer Request List – Security Administrator

- Verify the user information (Figure 6.2.3). Click the arrow beside **User Details** to expand.



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Michigan Department of Health and Human Services

Welcome: nelsonc14 DSA v2.0 (Staging)

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**Request ID** 68583  
**User** User, MCIR - (mcruser)  
**Area Code & Phone Number** 517-555-1111  
**Organization** Dept. of Health and Human Services-Health Services  
**Request Type** DropAccess

**Request Status** Director review completed  
**Email Address** mcruser@michigan.gov  
**State of Michigan Employee?** Yes  
**Date Submitted** 2/21/2020 12:37:00 PM  
**Request Term** Annual

**Security Administrator - Michigan Care Improvement Registry**  
 User Demographics

**User Details (Hide Details)** [Show Details](#)

<b>Last Name</b>	User	<b>Supervisor Name (Last, First)</b>	Super, Sally
<b>First Name</b>	MCIR	<b>Supervisor Phone</b>	517-555-1234
<b>Middle Initial</b>		<b>Supervisor Email</b>	supersally@michigan.gov
<b>Email Address</b>	mcruser@michigan.gov	<b>Office/Division/Section/Unit</b>	Joy Division
<b>Area Code &amp; Phone Number</b>	517-555-1111	<b>Primary Work Location - Name</b>	Downtown
<b>Fax Number</b>		<b>Primary Work Location - Street Address</b>	111 Main Avenue
<b>Organization Group</b>	State of Michigan	<b>Primary Work Location - City</b>	Lansing
<b>Organization</b>	Dept. of Health and Human Services-Health Services	<b>Primary Work Location - State</b>	MI
<b>State of Michigan Employee?</b>	Yes	<b>Primary Work Location - Zip Code</b>	48910
<b>HRMN ID</b>	123456789		

**Security Details**

**User Name (User ID)** User, MCIR - (mcruser)  
**User Email** mcruser@michigan.gov  
**Request Term** Annual  
**Organization**

Please drop the user's access from this application .

**Comments**

Comments

Message Action Complete-And-Go-To-Next Complete-And-Go-To-List Cancel Help Print

Figure 6.2.3: Security Administrator

**IMPORTANT:** The details crucial to completing the drop access request are located at the bottom in the **Security Details** section.

5. Review the **Request Reason** (Figure 6.2.4) to confirm the termination is appropriate.
6. Under **Security Details** take note of the **User Name** and **User ID**, along with the drop access instructions (i.e., “Please drop the user’s access from this application”).

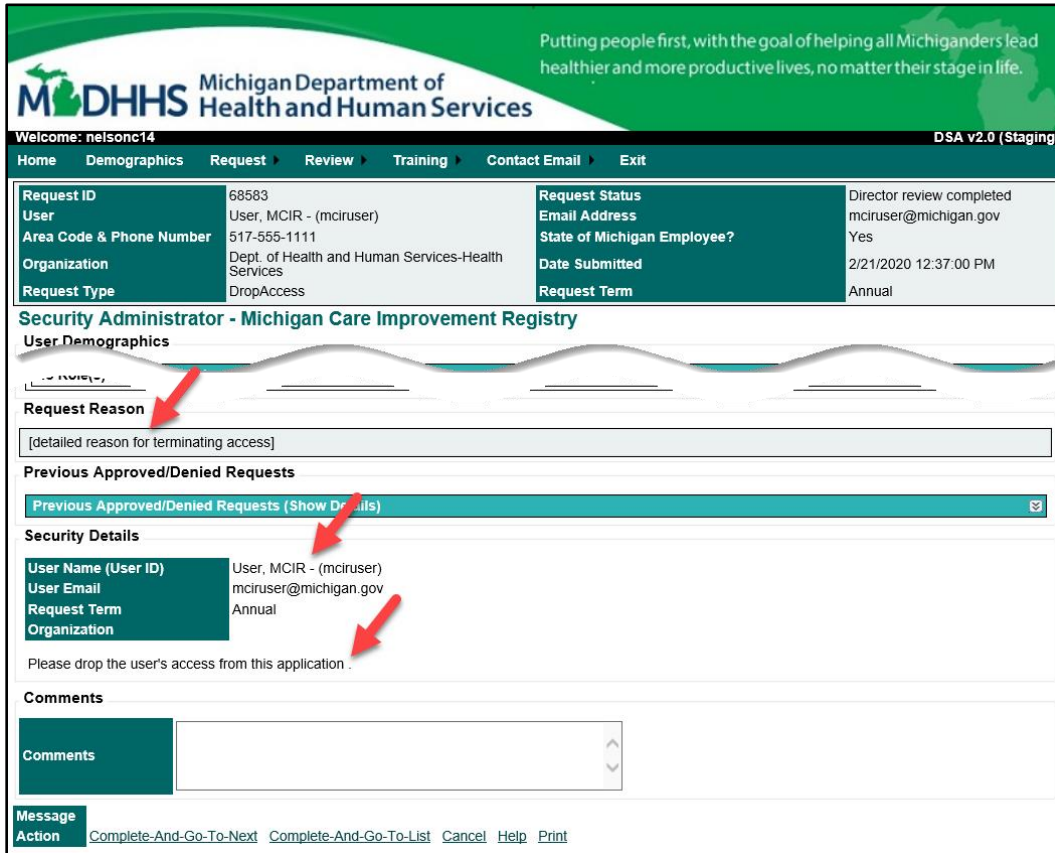


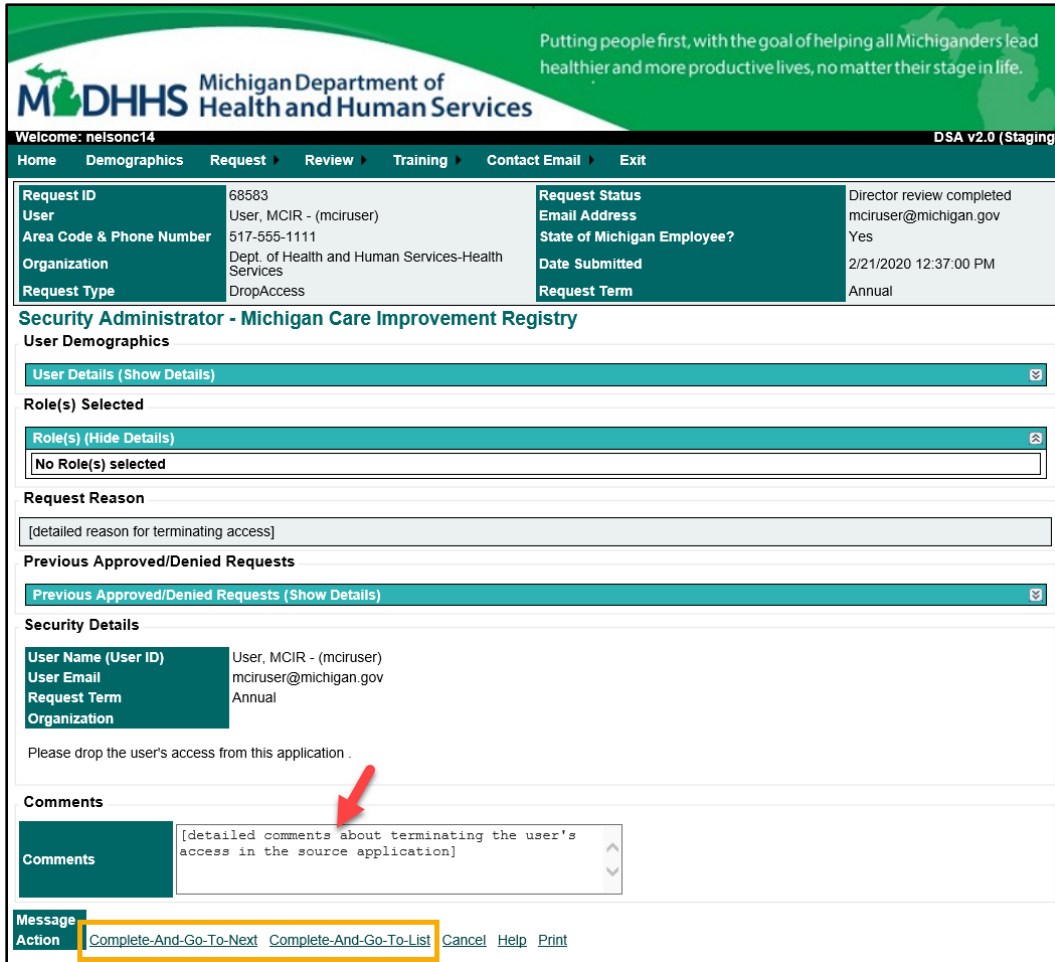
Figure 6.2.4: Security Administrator

7. Terminate the user’s access in the source application:
  - a. Access the source application for which the access termination is requested (e.g., CareConnect360, CHAMPS, MiSACWIS).
  - b. Follow the source application’s procedures for terminating the user’s access.
  - c. When complete, return to the DSA.

8. Only after the access has been terminated in the source application ( e.g., CareConnect360, CHAMPS, MiSACWIS), enter detailed **Comments** (Figure 6.2.5) about completing the access termination in the source application.
9. Click Complete And Go To Next to mark the drop access request complete, then advance to the next request on the list.

-or-

Click Complete And Go To List to mark the drop access request complete and return to the list of requests awaiting review.



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MDHHS Michigan Department of Health and Human Services

Welcome: nelsonc14 DSA v2.0 (Staging)

Home Demographics Request Review Training Contact Email Exit

Request ID	68583	Request Status	Director review completed
User	User, MCIR - (mcruser)	Email Address	mcruser@michigan.gov
Area Code & Phone Number	517-555-1111	State of Michigan Employee?	Yes
Organization	Dept. of Health and Human Services-Health Services	Date Submitted	2/21/2020 12:37:00 PM
Request Type	DropAccess	Request Term	Annual

**Security Administrator - Michigan Care Improvement Registry**

User Demographics

User Details (Show Details)

Role(s) Selected

Role(s) (Hide Details)

No Role(s) selected

Request Reason

[detailed reason for terminating access]

Previous Approved/Denied Requests

Previous Approved/Denied Requests (Show Details)

Security Details

User Name (User ID)	User, MCIR - (mcruser)
User Email	mcruser@michigan.gov
Request Term	Annual
Organization	

Please drop the user's access from this application .

Comments

Comments [detailed comments about terminating the user's access in the source application]

Message Action

Complete-And-Go-To-Next Complete-And-Go-To-List Cancel Help Print

Figure 6.2.5: Security Administrator

## 6.3 Bulk Generate Drop Access Requests

*Note:* Only the Form Administrator has the added ability to bulk generate drop access requests.

Complete the following steps to generate multiple drop access requests by spreadsheet upload:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Request Maintenance** from the **Admin** sub-menu (*Figure 6.3.1*). The Request Maintenance page displays.

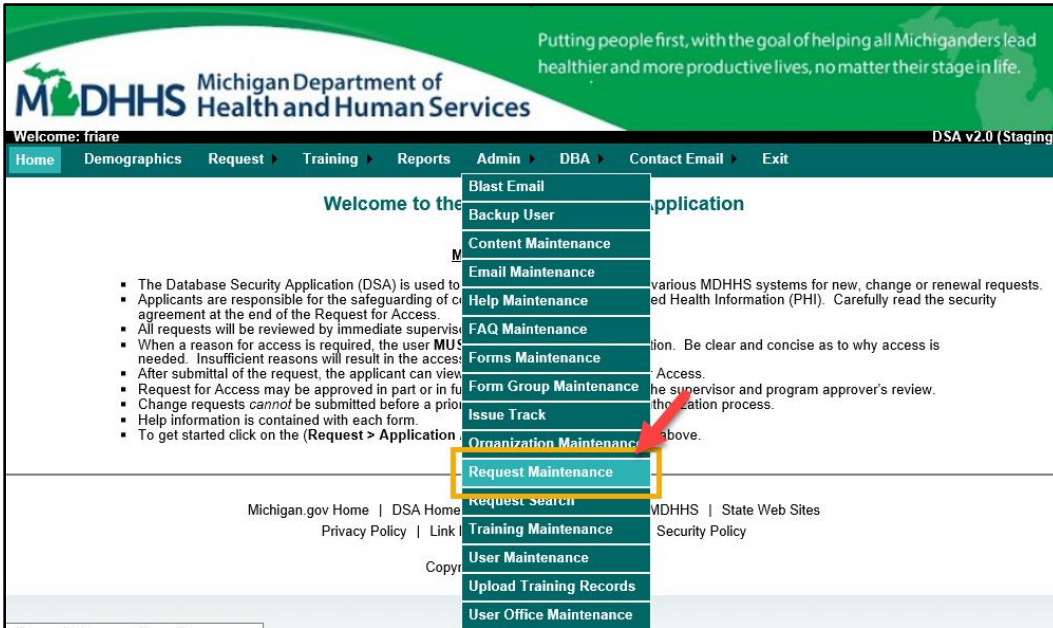


Figure 6.3.1: Admin – Request Maintenance

3. Click the **Drop Requests** tab (*Figure 6.3.2*).
4. Click **Upload From Excel**.

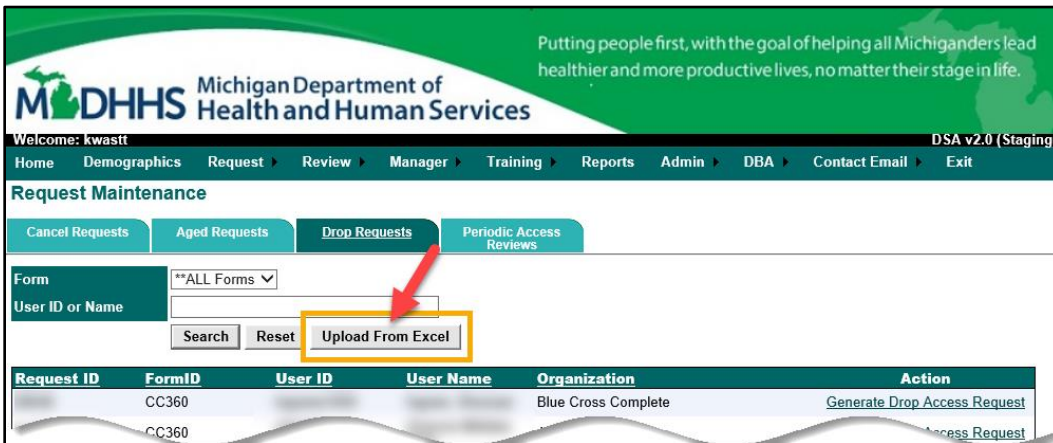


Figure 6.3.2: Request Maintenance – Drop Requests



5. To ensure proper file formatting, click Sample File (Figure 6.3.3) to access a sample Excel file to use as your template.



Figure 6.3.3: Request Maintenance – Drop Requests

6. Save the sample Excel file (Figure 6.3.4). This is a .csv (comma delimited) file and needs to be saved as a .csv file

**IMPORTANT:** Do not add, delete, or rename the columns. The Excel spreadsheet must contain exactly three (3) columns titled 'UserID', 'OrganizationName', and 'Reason'. **All three values are required in each row.**

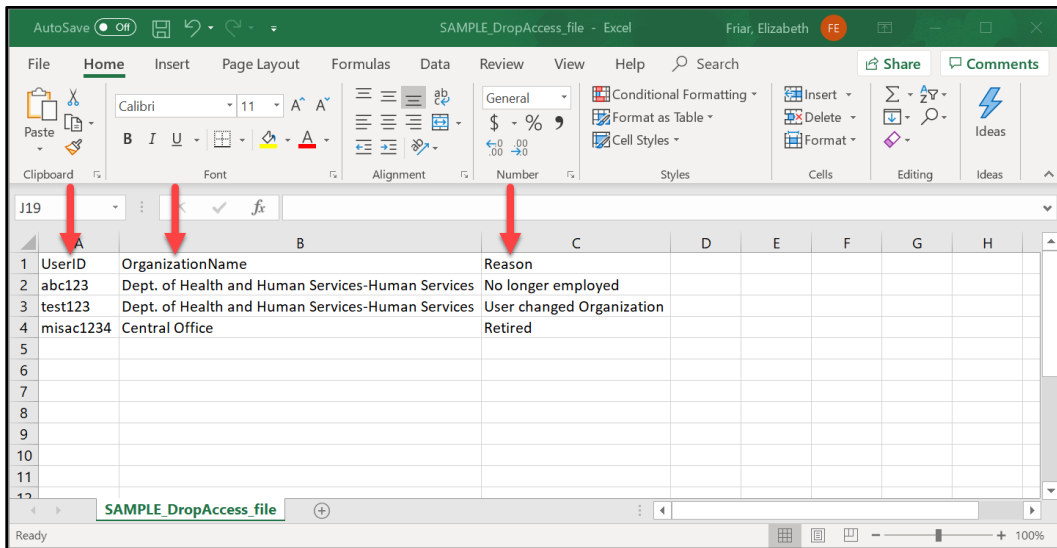


Figure 6.3.4: Sample Excel .csv File

7. To prepare the sample Excel file for upload, complete the following and save:
  - a. Begin with row number 2. Do not alter or delete the column titles in row number 1.
  - b. Replace the values in the sample file's **UserID** column (e.g., abc123, test123) with each MILogin user ID for whom access needs to be terminated. The maximum number of rows/user IDs allowed is 100.

- c. Replace the values in the sample file's **OrganizationName** column (e.g., Dept of Health and Human Services-Human Services, Central Office) with each user's organization. Please see the **IMPORTANT** note below.
- d. Replace the values in the sample file's **Reason** column (e.g., No longer employed, Retired) with the reason for each user's termination. Note, the reason entered will display in the generated drop access request's **Reason** field.

**IMPORTANT:** The organization name must exactly match the organization name as it exists within the DSA. Form Administrators can access the organization name by selecting **Request Search** from the **Admin** sub-menu and clicking **View** beside the user's current/to-be-terminated access request. The **Organization** name is located at the top (Figure 6.3.5).



Figure 6.3.5: Request Search – Request Details – Get Organization Name

- 8. Once the spreadsheet is saved and ready for upload, select the application name in the **Form** list (Figure 6.3.6) for which the drop access requests are being made (e.g., CC360, CHAMPS, MISACWIS).



Figure 6.3.6: Request Maintenance – Drop Requests

9. Click **Browse...** to select the Excel file to be uploaded (*Figure 6.3.7*). Once selected, the file name displays in the **File to upload** field.
10. Click Upload to submit the Excel file. The ‘upload successful’ and ‘rows inserted: <#>’ messages display.

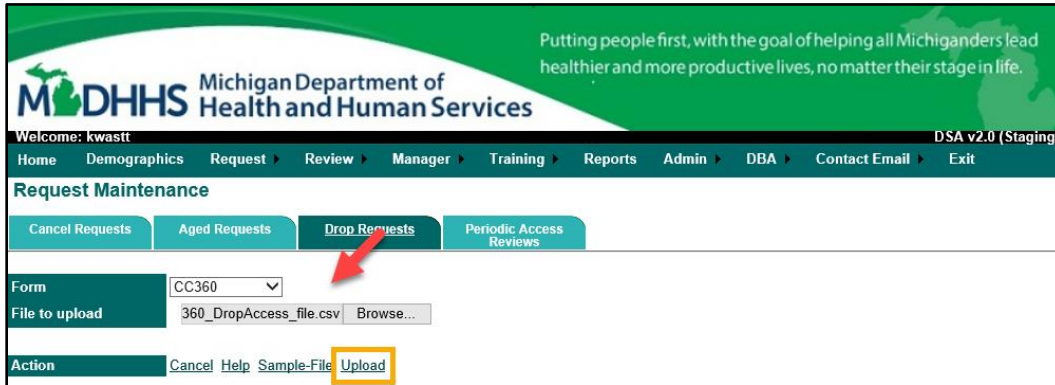


Figure 6.3.7: Request Maintenance – Drop Requests

11. Click Create Drop Requests (*Figure 6.3.8*) to complete the process. The application’s Security Administrator is notified by email to review the drop access request and terminate the user’s access in the source application. Please reference [6.2 Complete a Drop Access Request](#) for additional information.

-or-

Click Create Drop Requests And Complete to create the drop requests *and* mark the requests as complete within the DSA. This option is beneficial when reconciling the DSA with users already terminated in the source application due to reasons such as 60-day inactivity termination.

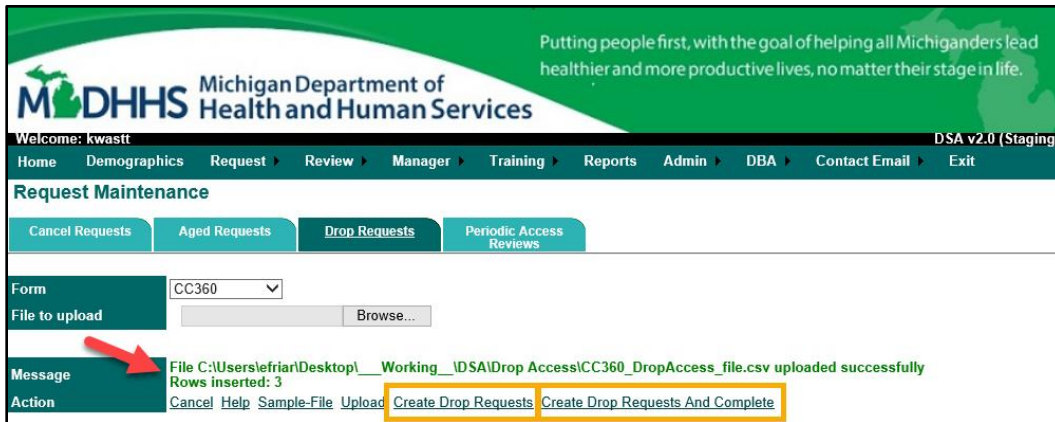


Figure 6.3.8: Request Maintenance – Drop Requests

12. When successful, the request ID numbers display for the drop access requests generated (Figure 6.3.9).

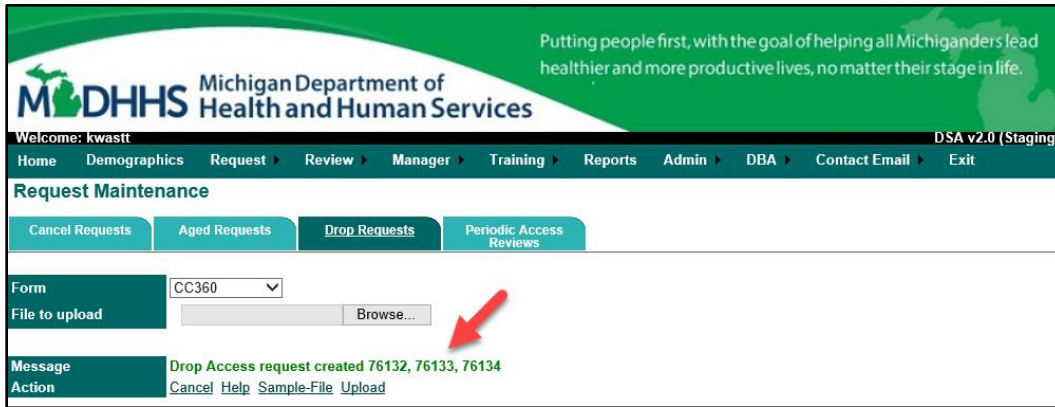


Figure 6.3.9: Request Maintenance – Drop Requests

*Note:* If a User ID/Organization Name combination does not have a current access request matching the access termination need -or- a drop access request is already in process, the message “**Excel file not processed due to error(s) below. Please address the errors and resubmit.**” displays and specific details are listed (Figure 6.3.10). Correct the errors, then repeat [steps 8-12](#) to resubmit the Excel file.

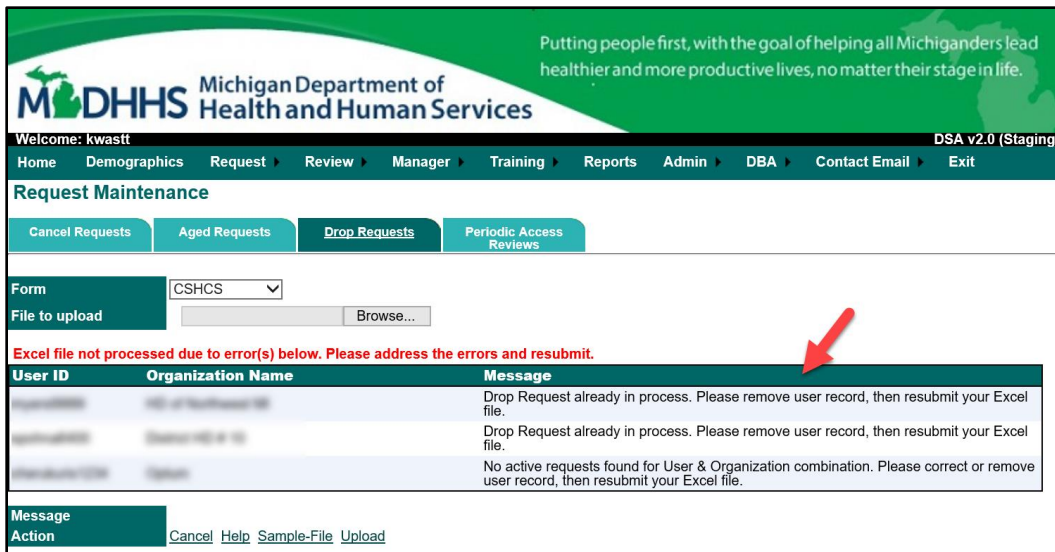


Figure 6.3.10: Request Maintenance – Drop Requests

- To confirm the creation of your bulk-generated drop access requests, select **Request Search** from the **Admin** sub-menu (Figure 6.3.11). The Request Search page displays.



Figure 6.3.11: Admin – Request Search

- Use the search fields to narrow the results (Figure 6.3.12). For example, select the ‘DropAccess’ **Request Type** and the application name in the **Form** field, then click **Search**.
- Note the request IDs corresponding to your bulk upload listed in the results grid.
- Click **View** to view the drop access request details.
- Click **Print** to print the drop access request details.

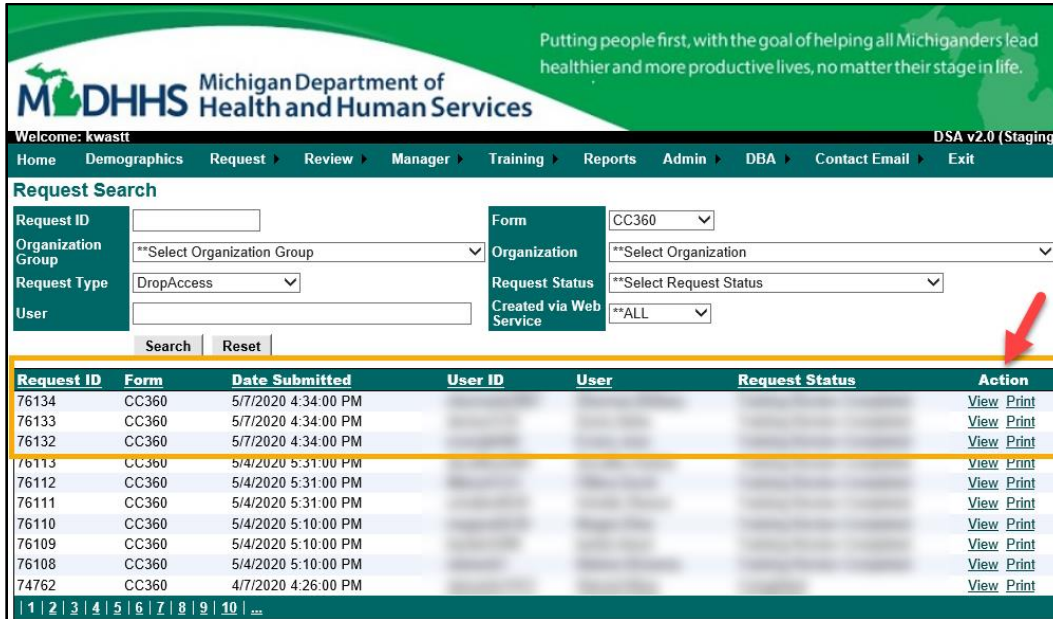


Figure 6.3.12: Request Search

# 7 Maintaining Approvers: Management

Users who review and approve MDHHS application access requests are called approvers in the DSA. The Immediate Manager and the Organization Manager are DSA approver/management roles available for request within the DSA. These access request management roles must be approved.

In addition, all approvers should have at least one backup approver assigned for each approval level for which they are responsible (e.g., Immediate Manager, Program Manager, Director). Backup approvers are designated for a defined timeframe, and they must also be approved.

## 7.1 Review Immediate Manager DSA Role Request

A user selects their Immediate Manager while filling out an application access request form. The Immediate Manager works closely with the user, and therefore understands the user’s business needs as they relate to application access needs.

Each organization must have at least one individual set up with the Immediate Manager role within the DSA. The Immediate Manager completes the first step in the review and approval process by affirming that the user requires access to the requested application to complete their job duties.

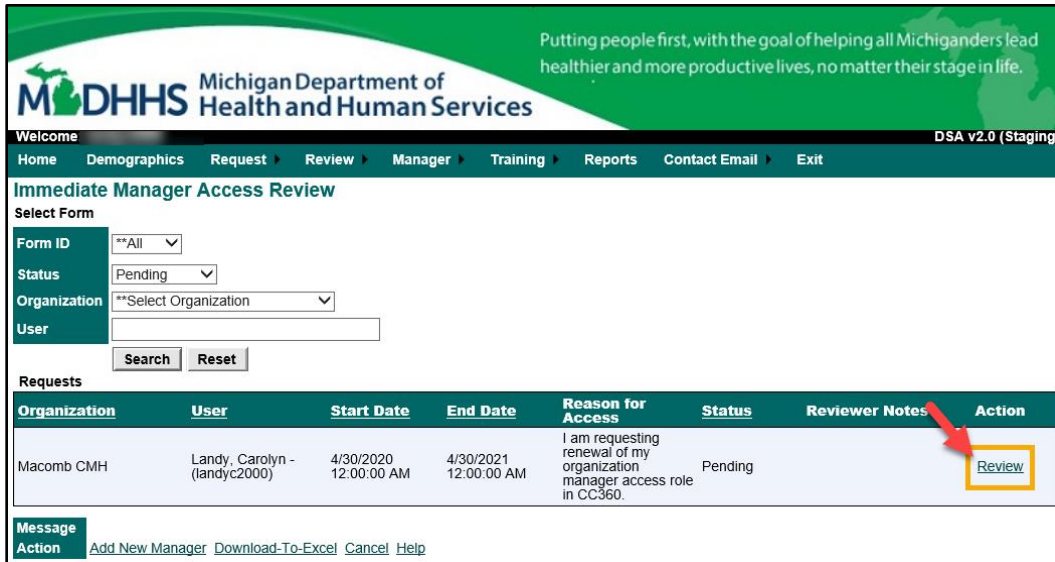
Complete the following steps to review an Immediate Manager DSA role request:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Immediate Manager Access** from the **Manager** sub-menu (*Figure 7.1.1*). The Immediate Manager Access Review page displays.



Figure 7.1.1: Home

- Click **Review** beside the request to be reviewed (Figure 7.1.2). The Review Immediate Manager Access Request window displays.



Michigan Department of Health and Human Services

Welcome DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Reports Contact Email Exit

**Immediate Manager Access Review**

Select Form

Form ID:

Status:

Organization:

User:

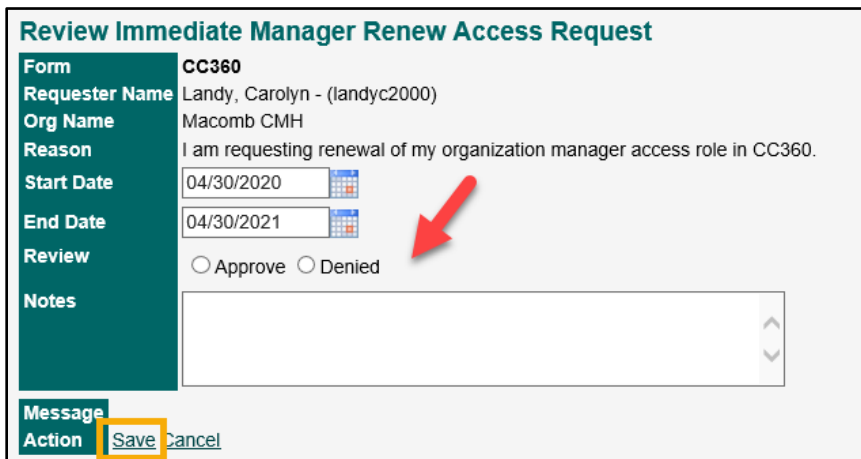
Organization	User	Start Date	End Date	Reason for Access	Status	Reviewer Notes	Action
Macomb CMH	Landy, Carolyn - (landyc2000)	4/30/2020 12:00:00 AM	4/30/2021 12:00:00 AM	I am requesting renewal of my organization manager access role in CC360.	Pending		<input type="button" value="Review"/>

Message Action

Figure 7.1.2: Immediate Manager Access Review

*Note:* The Immediate Manager role automatically defaults to a one-year timeframe. Update the **Start Date** and/or **End Date** if appropriate.

- To approve the Immediate Manager role assignment, select the **Approve** radio button (Figure 7.1.3).
- To deny the Immediate Manager role assignment, select the **Denied** radio button.
- Enter detailed **Notes** regarding the Immediate Manager role assignment or denial. *Notes are required.*
- Click **Save**.



**Review Immediate Manager Renew Access Request**

Form: **CC360**

Requester Name: Landy, Carolyn - (landyc2000)

Org Name: Macomb CMH

Reason: I am requesting renewal of my organization manager access role in CC360.

Start Date:

End Date:

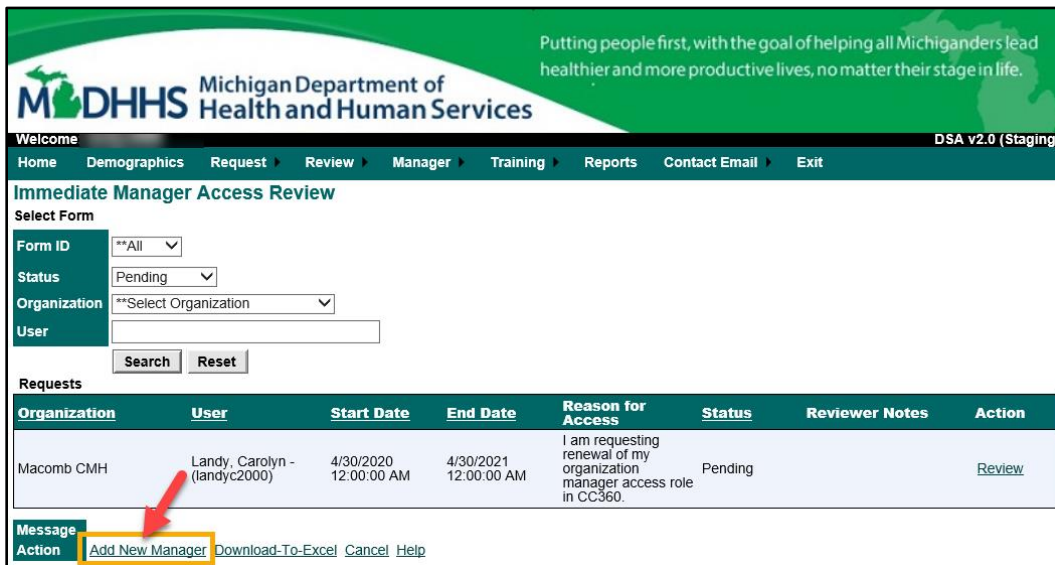
Review:  Approve  Denied

Notes:

Message Action

Figure 7.1.3: Review Immediate Manager Access Request

Note: Immediate Managers can also be assigned using the Add New Manager link (Figure 7.1.4).



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Michigan Department of Health and Human Services

Welcome DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Reports Contact Email Exit

### Immediate Manager Access Review

Select Form

Form ID:

Status:

Organization:

User:

Requests

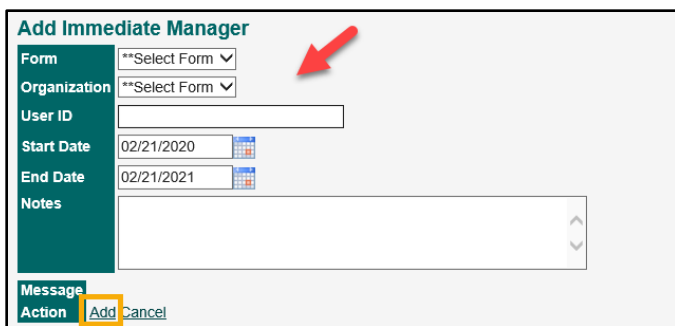
Organization	User	Start Date	End Date	Reason for Access	Status	Reviewer Notes	Action
Macomb CMH	Landy, Carolyn - (landyc2000)	4/30/2020 12:00:00 AM	4/30/2021 12:00:00 AM	I am requesting renewal of my organization manager access role in CC360.	Pending		<a href="#">Review</a>

Message Action: [Add New Manager](#) [Download-To-Excel](#) [Cancel](#) [Help](#)

Figure 7.1.4: Immediate Manager Access Review

Upon clicking Add New Manager, the Add Immediate Manager window appears (Figure 7.1.5):

- ✓ Select the access request **Form** for which the user is the Immediate Manager, then select the user's **Organization**.
- ✓ Begin entering the user's **User ID**, a list of potential suggestions automatically displays. Select the user from the list.
- ✓ Update the **Start Date** and **End Date** if necessary, otherwise it defaults to a one year timeframe.
- ✓ Enter detailed **Notes** regarding the Immediate Manager role assignment. *Notes are required.*
- ✓ Click Add.



### Add Immediate Manager

Form:

Organization:

User ID:

Start Date:

End Date:

Notes:

Message Action: [Add](#) [Cancel](#)

Figure 7.1.5: Add Immediate Manager



## 7.2 Review Organization Manager DSA Role Request

Each organization has an individual assigned the Organization Manager role within the DSA. The Organization Manager approves, grants, and maintains the Immediate Manager role within the DSA for their organization. The Organization Manager role is approved, granted, and maintained by the MDHHS Sponsor.

Complete the following steps to review an Organization Manager DSA role request:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Organization Manager Access** from the **Manager** sub-menu (*Figure 7.2.1*). The Organization Manager Access Review page displays.

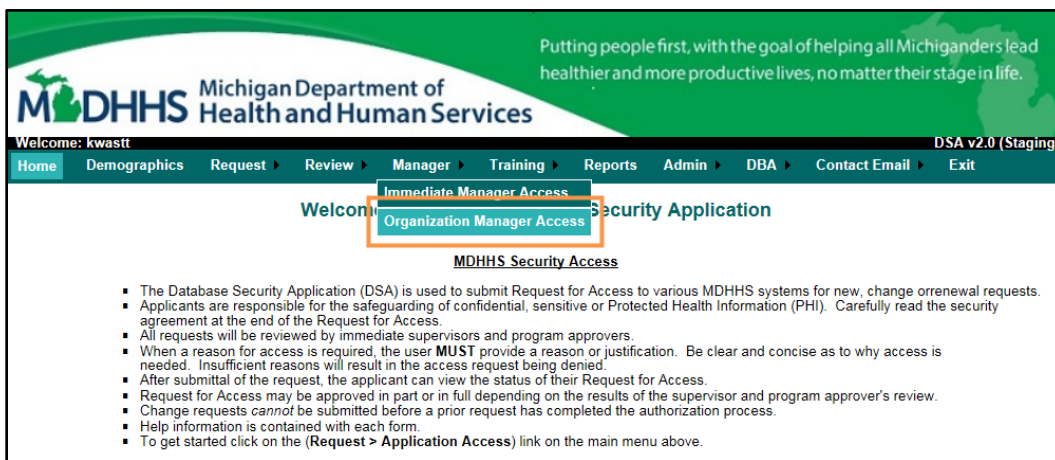


Figure 7.2.1: Home

3. Click Review beside the request to be reviewed (*Figure 7.2.2*). The Review Organization Manager Access Request window displays.

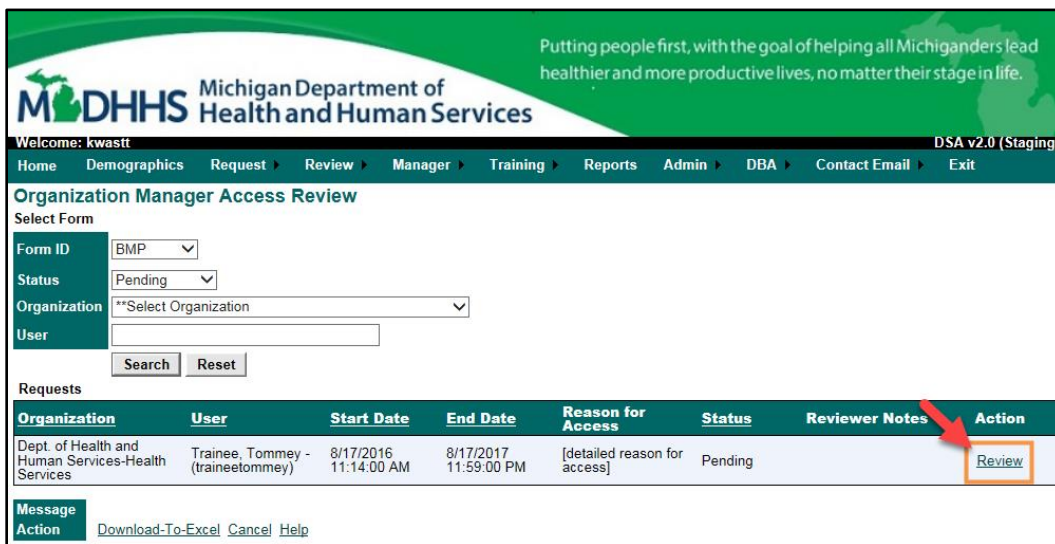
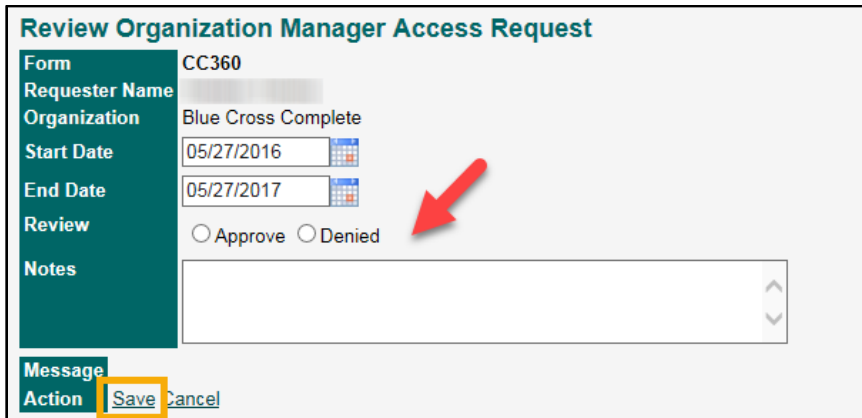


Figure 7.2.2: Organization Manager Access Review

*Note:* The Organization Manager role defaults to a one-year timeframe. Update the **Start Date** and/or **End Date** if appropriate.

4. To approve the Organization Manager role assignment, select the **Approve** radio button (*Figure 7.2.3*).
5. To deny the Organization Manager role assignment, select the **Denied** radio button.
6. Enter detailed **Notes** regarding the Organization Manager role assignment or denial. *Notes are required.*
7. Click Save.



**Review Organization Manager Access Request**

Form	CC360
Requester Name	
Organization	Blue Cross Complete
Start Date	05/27/2016
End Date	05/27/2017
Review	<input type="radio"/> Approve <input type="radio"/> Denied
Notes	

Message

Action **Save** Cancel

Figure 7.2.3: Review Organization Manager Access Request

## 7.3 Assign Backup Approvers

Backup approvers complete reviews when the usual approver is unavailable. All approvers should have one or more backup approver assigned for each approval level for which they are responsible (e.g., Immediate Manager, Program Manager, Director). Backup approvers are designated for a defined timeframe and they must be approved.

Complete the following steps to assign your backup approvers in the DSA:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **My Backup Users** from the **Request** sub-menu (*Figure 7.3.1*). The My Backup Users page displays.



Figure 7.3.1: Home – Request – My Backup Users

3. If necessary select the access request **Form**, or **Form** and **Role** combination, (*Figure 7.3.2, top*) and click **Search** to narrow items displaying on the **Overview** tab.

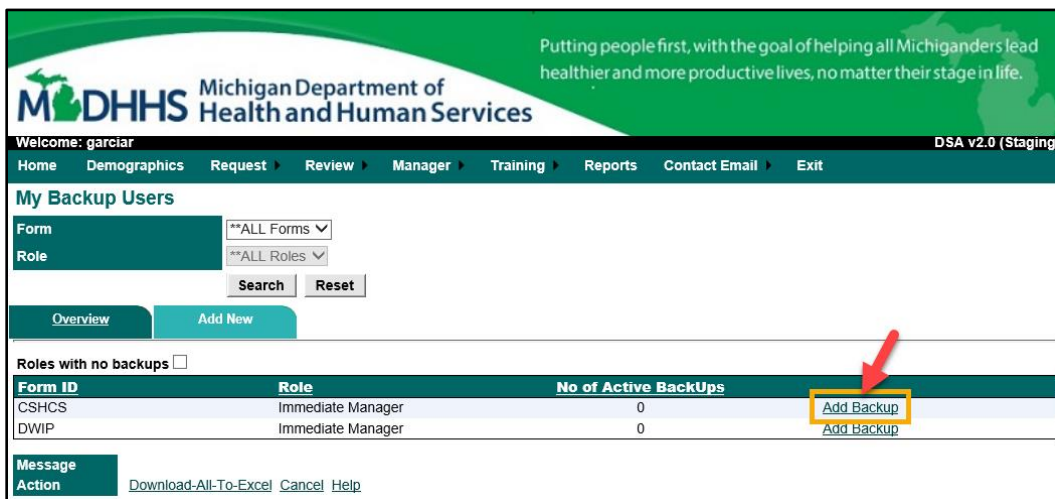


Figure 7.3.2: My Backup Users – Overview

4. To assign a new backup approver:
  - a. Click Add Backup (Figure 7.3.2, above). The **Add New** tab displays.
  - b. Select the checkbox beside the role(s) for which you are adding a backup approver (Figure 7.3.3).

*Note:* The **Begin Date** and **End Date** default to a one-year timeframe for your backup approver. Update the dates if necessary. Future dates (within one year) are accepted.

- c. Begin entering the backup approver’s name in the **Backup User** field. As you enter, a list of potential suggestions automatically displays.
  - d. Select your backup approver from the auto-suggestions list. The backup approver’s name and user ID populate the **Backup User** field.

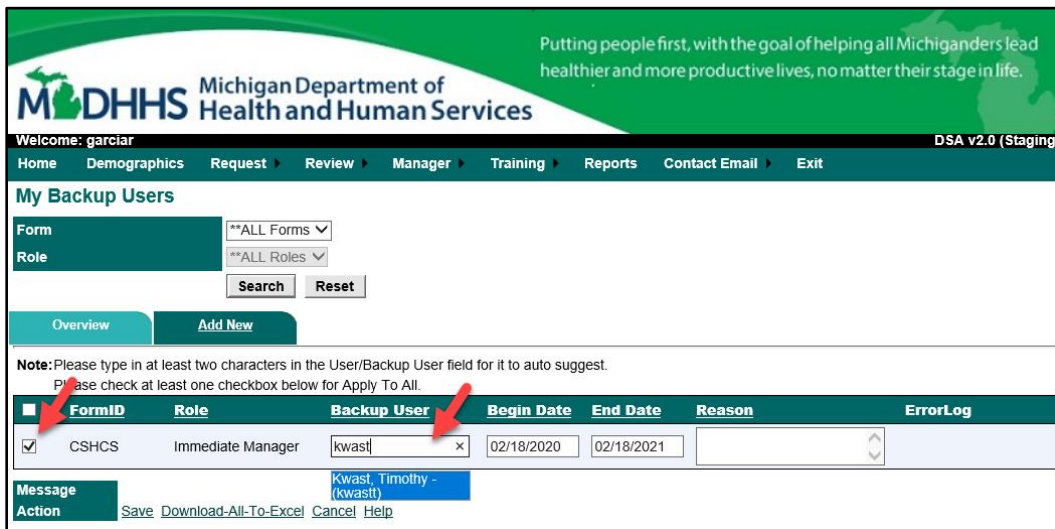


Figure 7.3.3: My Backup Users – Add New

- e. Enter a detailed **Reason** (Figure 7.3.4) explaining the backup approver assignment.
  - f. Click Save.
  - g. Repeat steps [4a-4f](#) to assign additional backup approvers.

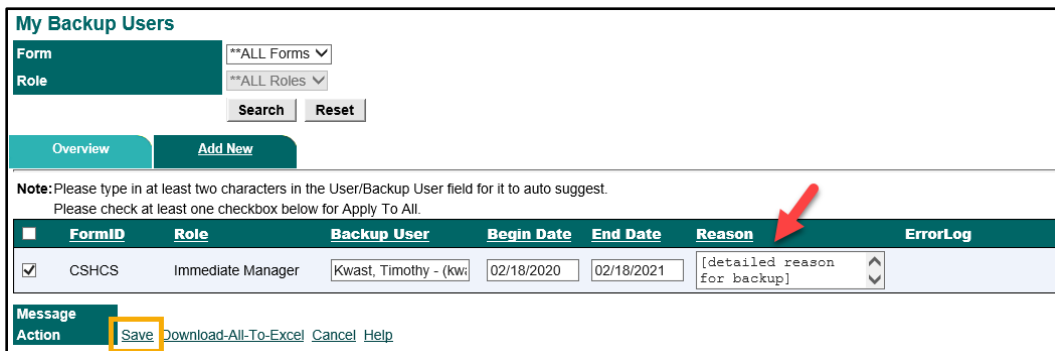


Figure 7.3.4: My Backup Users – Add New

Note: All backup approver assignments remain in a 'Pending' status (Figure 7.3.5, Pending tab) until approved by the access request form's Form Administrator. Please reference [7.4 Review Backup Approver Assignments](#) for additional information.

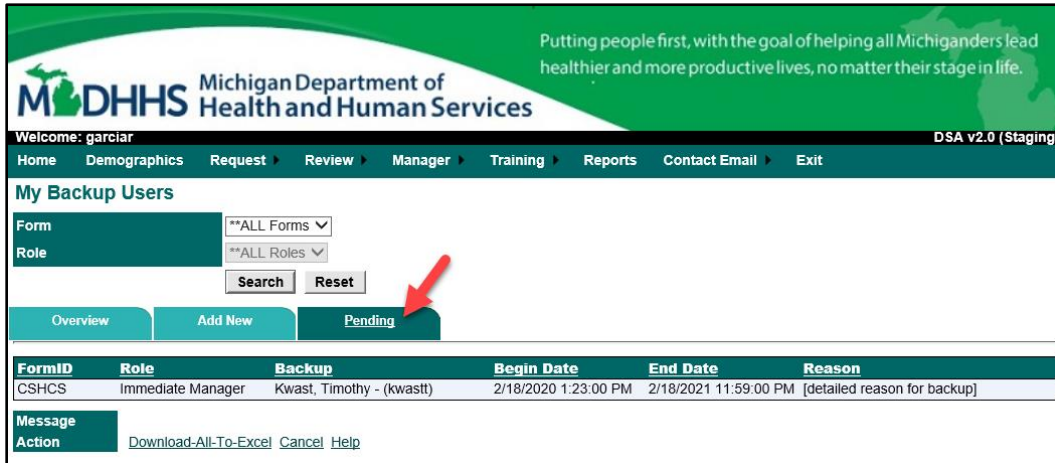


Figure 7.3.5: My Backup Users – Pending

5. To assign backup approvers for multiple approver roles at once:
  - a. Access the **Add New** tab (Figure 7.3.6).
  - b. Select the checkbox beside the roles for which you are designating a backup approver. To 'select all', select the check box in the green header row.

Note: The **Begin Date** and **End Date** default to a one-year timeframe for your backup approver. Update the dates if necessary. Future dates (within one year) are accepted.

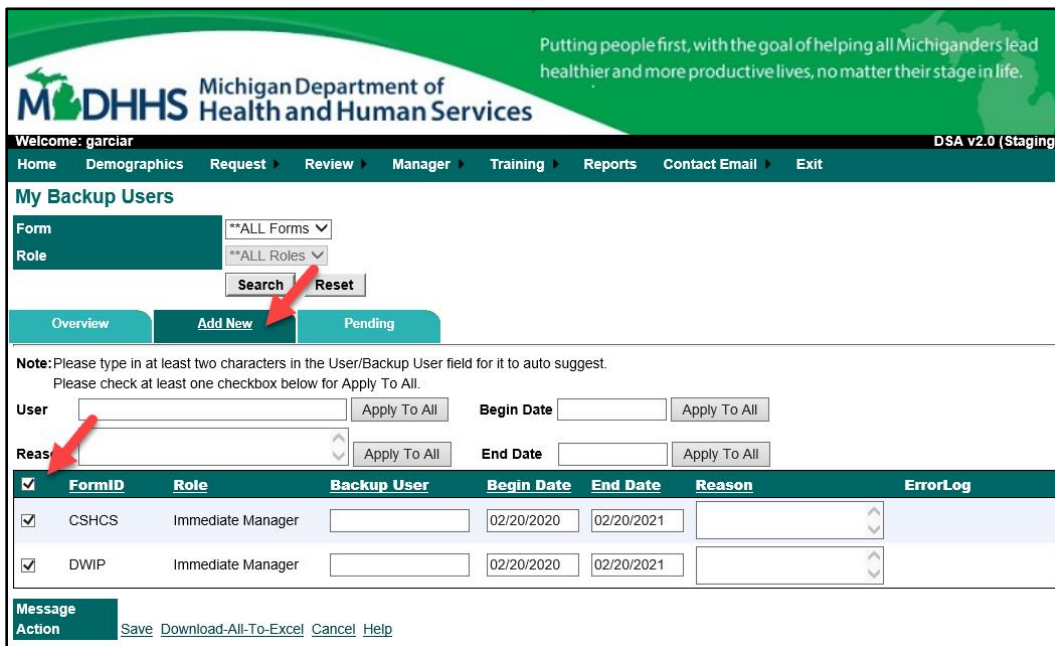
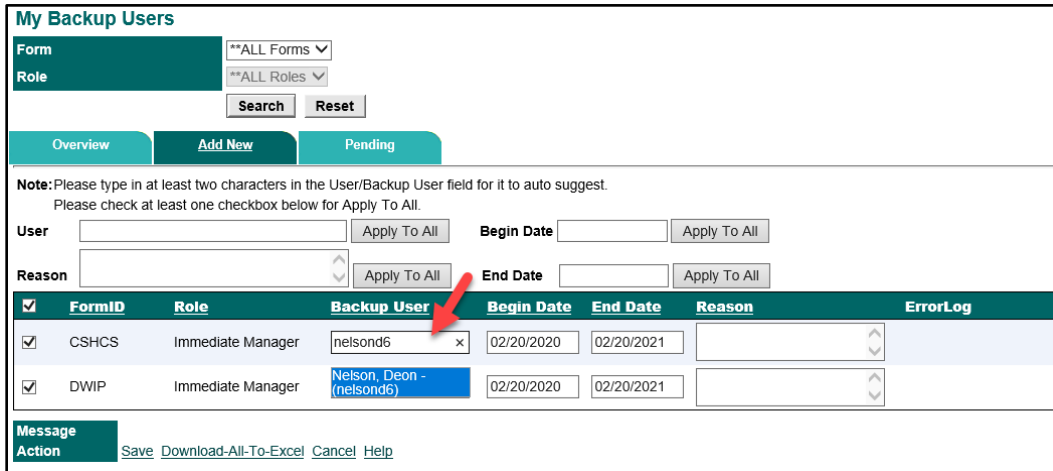


Figure 7.3.6: My Backup Users – Add New

- c. Begin entering the backup approver’s name in the **Backup User** field (Figure 7.3.7). As you enter, a list of potential suggestions automatically displays.
- d. Select your backup approver from the auto-suggestions list.



**My Backup Users**

Form: \*\*ALL Forms  
 Role: \*\*ALL Roles

Search Reset

Overview Add New Pending

Note: Please type in at least two characters in the User/Backup User field for it to auto suggest.  
 Please check at least one checkbox below for Apply To All.

User: [text] Apply To All Begin Date: [text] Apply To All

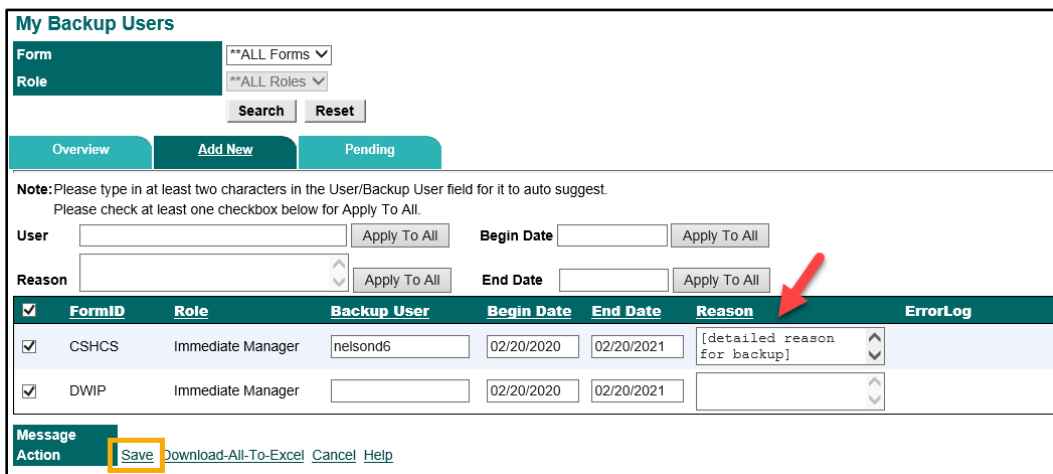
Reason: [text] Apply To All End Date: [text] Apply To All

FormID	Role	Backup User	Begin Date	End Date	Reason	ErrorLog
<input checked="" type="checkbox"/>	CSHCS	Immediate Manager nelsond6	02/20/2020	02/20/2021		
<input checked="" type="checkbox"/>	DWIP	Immediate Manager Nelson, Deon - (nelsond6)	02/20/2020	02/20/2021		

Message Action: Save Download-All-To-Excel Cancel Help

Figure 7.3.7: My Backup Users – Add New

- e. Enter a detailed **Reason** (Figure 7.3.8) explaining the backup approver assignment.
- f. Complete [steps 5a-5e](#) for all rows you selected.
- g. Click **Save**.



**My Backup Users**

Form: \*\*ALL Forms  
 Role: \*\*ALL Roles

Search Reset

Overview Add New Pending

Note: Please type in at least two characters in the User/Backup User field for it to auto suggest.  
 Please check at least one checkbox below for Apply To All.

User: [text] Apply To All Begin Date: [text] Apply To All

Reason: [text] Apply To All End Date: [text] Apply To All

FormID	Role	Backup User	Begin Date	End Date	Reason	ErrorLog
<input checked="" type="checkbox"/>	CSHCS	Immediate Manager nelsond6	02/20/2020	02/20/2021	[detailed reason for backup]	
<input checked="" type="checkbox"/>	DWIP	Immediate Manager	02/20/2020	02/20/2021		

Message Action: Save Download-All-To-Excel Cancel Help

Figure 7.3.8: My Backup Users – Add New

6. To assign the same backup approver details for multiple approver roles at once:
  - a. Select the checkbox beside the roles for which you are designating a backup approver (*Figure 7.3.9*). To ‘select all’, select the check box in the green header row.
  - b. Begin entering the backup approver’s name in the **User** field at the top of the **Add New** tab. As you enter, a list of potential suggestions automatically displays.
  - c. Select your backup approver from the auto-suggestions list and click **Apply To All**. The backup approver’s name and user ID populate the **Backup User** field for each row selected below.
  - d. Enter a detailed reason explaining the backup approver assignment in the **Reason** field at the top and click **Apply To All**. The reason populates the **Reason** field for each row selected below.
  - e. If the default one-year timeframe is incorrect for your backup approver assignment, enter the appropriate date(s) in the **Begin Date** and/or **End Date** fields at the top and click **Apply To All**. The corresponding date populates the **Begin Date** and/or **End Date** for each row selected below.
  - f. Click Save.



Putting people first, with the goal of helping all Michiganders lead healthier and more productive lives, no matter their stage in life.

Michigan Department of Health and Human Services

Welcome: garciar DSA v2.0 (Staging)

Home Demographics Request Review Manager Training Reports Contact Email Exit

**My Backup Users**

Form  Role

Overview **Add New** Pending

Note: Please type in at least two characters in the User/Backup User field for it to auto suggest.  
 Please check at least one checkbox below for Apply To All

User   Begin Date

Reason   End Date

<input checked="" type="checkbox"/>	FormID	Role	Backup User	Begin Date	End Date	Reason	ErrorLog
<input checked="" type="checkbox"/>	CSHCS	Immediate Manager	Nelson, Deon - (nelsc)	3/2/2020	4/3/2020	[detailed reason for backup]	
<input checked="" type="checkbox"/>	DWIP	Immediate Manager	Nelson, Deon - (nelsc)	3/2/2020	4/3/2020	[detailed reason for backup]	

Message Action

Figure 7.3.9: My Backup Users – Add New

**IMPORTANT:** Remember, all backup approver assignments remain in a ‘Pending’ status until approved by the access request form’s Form Administrator. Please reference [7.4 Review Backup Approver Assignments](#) for additional information.

## 7.4 Review Backup Approver Assignments

Users who review and approve MDHHS application access requests are called approvers in the DSA. Backup approvers complete reviews when the usual approver is unavailable.

All approvers should have at least one backup approver assigned for each approval level for which they are responsible. Backup approvers are designated for a defined timeframe and they must be approved by the access request form's Form Administrator.

Complete the following steps to review a DSA backup approver assignment:

1. Complete the steps in [1.4 Accessing the DSA](#).
2. Select **Backup Review** from the **Review** sub-menu (*Figure 7.4.1*). The Backup User Review page displays.

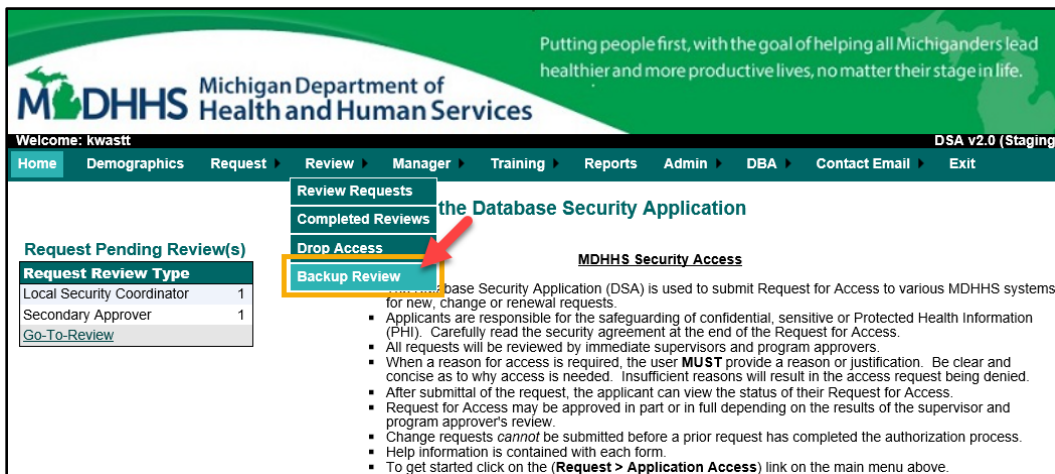
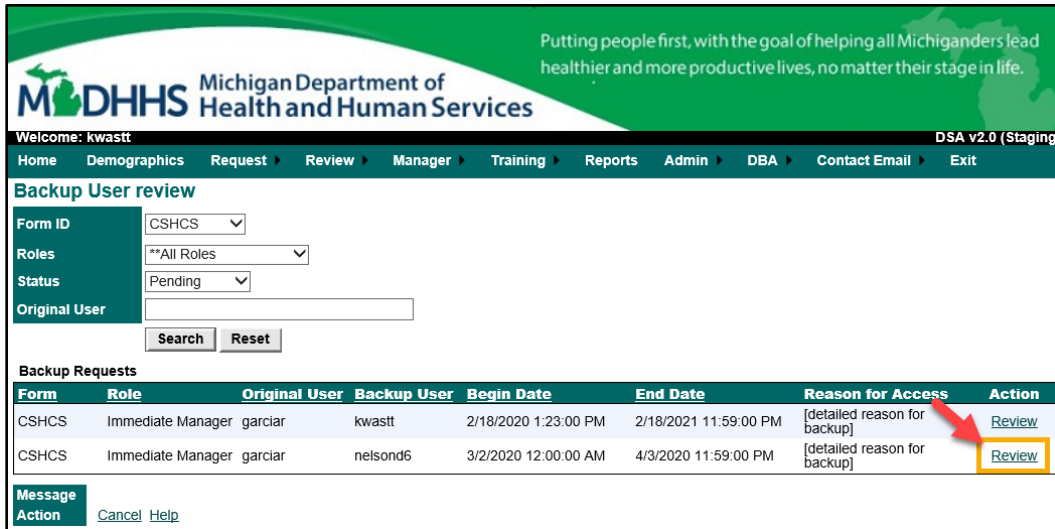


Figure 7.4.1: Home – Review – Backup Review



- Click Review beside the backup approver to be reviewed ( *Figure 7.4.2*). The Backup User Review window displays.



Form	Role	Original User	Backup User	Begin Date	End Date	Reason for Access	Action
CSHCS	Immediate Manager	garciar	kwastt	2/18/2020 1:23:00 PM	2/18/2021 11:59:00 PM	[detailed reason for backup]	<a href="#">Review</a>
CSHCS	Immediate Manager	garciar	nelsond6	3/2/2020 12:00:00 AM	4/3/2020 11:59:00 PM	[detailed reason for backup]	<a href="#">Review</a>

Figure 7.4.2: Backup User Review

- To approve the backup approver assignment, select the **Approved** radio button ( *Figure 7.4.3*).
- To deny the access request, select the **Denied** radio button.
- Enter detailed **Notes** about the backup approver approval or denial. *Notes are required.*
- Click Save.

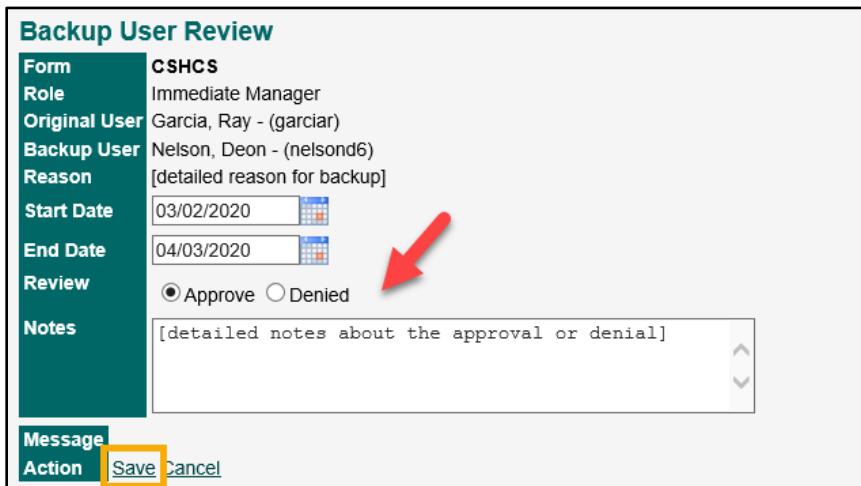


Figure 7.4.3: Backup User Review pop-up