



Virtual Gateway HCSIS Roles Guide

Executive Office of Health and Human Services

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Introduction

The Virtual Gateway HCSIS Roles Guide consists of two parts: the Roles Descriptions and the Roles-At-A-Glance. The Roles Descriptions contains detailed information about each of the HCSIS roles. The Roles-At-A-Glance is a quick reference guide that presents the HCSIS roles and access information in a chart format. The Virtual Gateway HCSIS Roles Guide is designed to help providers and state operated programs complete the VG HCSIS User Request Form. The information that is entered in the HCSIS User Request Form will be used to create user accounts. For security reasons, any provider or state operated program staff that will be using the electronic HCSIS must have a user account. Keep in mind as you determine who amongst your staff will be authorized to use HCSIS that you can assign the same staff person more than one HCSIS role, or you can assign a different staff person for each HCSIS role. With the exception of the Human Rights Coordinator and Provider Investigations Designee roles, you are also not limited to the number of staff who can be assigned to a particular HCSIS role. Once you determine how HCSIS will be implemented at your organization and take into account the functions that your staff presently performs with respect to incident management, restraints, medication occurrences, death reporting, health care records and investigations, the assignment of appropriate HCSIS roles for your staff should logically follow. Assignments should reflect the business processes and workflows at the provider or state operated program.

For example, within the Incident Management Module there are four HCSIS roles that are authorized to enter information about the major incident within the Incident Management (IM) module: the Restricted Provider IM Data Entry, the IM Data Entry Staff, the IM Staff, and the IM Supervisor Roles. It is up to you, as the provider or state operated program, to decide who amongst your staff is to be assigned these roles. Each role defines what the assigned staff person can do within the HCSIS application. For example, a residential provider may decide to assign the IM Data Entry Role to a direct support staff working in a home. In that role, that staff person would only be authorized to create (e.g. data enter) the initial incident report. For the House Manager, you may want to give that staff person the ability to create the initial report and also to submit it to the DDS area office. In that case, you would assign the role of IM Staff to the House Manager. Should you decide to limit the House Manager to creating an initial report only, then you would assign the role of IM Data Entry. However, if you decide that you want the House Manager to not only create and submit the initial and final reports in HCSIS but also to view those reports and the actions and comments from DDS, then you would assign to the House Manager the role of IM Supervisor.



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There are two other important roles that require assignment. The first is the VG Access Administrator for HCSIS who is responsible for informing and updating VG Help Desk as to the staff who are to be authorized to access HCSIS through the Virtual Gateway. The HCSIS Access Administrator is also the only authorized staff to sign the HCSIS User Request Form. The Local HCSIS Administrator is the staff person who can assign or change HCSIS roles to those staff having been identified by the VG Access Administrator to access HCSIS. At least one Local HCSIS Administrator assignment must be made in the first HCSIS User Request Form submitted to VG. The Local HCSIS Administrator may be the same individual as the VG Access Administrator for HCSIS. You may assign more than one Access Administrator and more than one Local HCSIS Administrator.



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Roles - Descriptions

ROLE NAME	Exec. Director / Designee
ROLE DESCRIPTION	This role can review Incident Management information entered into HCSIS for individuals receiving services from the provider organization. In addition, the Executive Director / Designee can use the process management screens and system generated reports to analyze information and help support ongoing quality management initiatives.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	The Executive Director or their designee of a provider organization responsible for the oversight of all Incident Management activities.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Review Incident Reports, Medication Occurrence Reports, and Restraint Reports on individuals served by the provider • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Reporting</p> <ul style="list-style-type: none"> • Read-only access to the submitted/finalized Incident Report, Area and Regional Management Review, finalized Optionally Reportable Event and Process Management Screens <p>Medication Occurrences</p> <ul style="list-style-type: none"> • Read-only access to finalized MOR and the Regional MAP Review <p>Restraint Reporting</p> <ul style="list-style-type: none"> • Read-only access to finalized Restraint Report, finalized Restraint Manager Review, finalized Area Management Review, finalized HR Committee Review, and finalized Commissioner’s Review
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Incident Management Filing and Review Process Quick Guide • Reports User Guide



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ROLE NAME	HCR Data Entry
ROLE DESCRIPTION	<p>This role can enter and update individual health care record information in HCSIS. Information to be entered includes medications, allergies, diagnosis, functional status, special needs, contacts, immunizations, past medical history, and family history.</p> <p>Note: This is strictly a data entry role. This role does not have the ability to finalize a Health Care Record in the system.</p>
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	Designated staff in a private or state operated residence responsible for entering individual health care record information into HCSIS.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and update a Health Care Record • Request and review Management Reports
SYSTEM ACCESS	<p>Health Care Record</p> <ul style="list-style-type: none"> • Update access to Health Care Records
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Health Care Record Quick Guide • Health Care Record User Guide • Reports User Guide



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ROLE NAME	HCR Supervisor
ROLE DESCRIPTION	This role can create, update, and finalize Health Care Records.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	Designated management staff in a private or state operated residence responsible for maintaining individual health care record information in HCSIS.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and update a Health Care Record • Finalize a Health Care Record • Request and review Management Reports
SYSTEM ACCESS	Health Care Record <ul style="list-style-type: none"> • Update access to Health Care Records
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Health Care Record Quick Guide • Health Care Record User Guide • Reports User Guide



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ROLE NAME	Human Rights Coordinator
ROLE DESCRIPTION	This role enters into HCSIS the Human Rights Committee's review of the use of a restraint.
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated provider staff or Human Rights Committee member in charge of recording the Committee's comments regarding the use of the restraint.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Enter the Human Rights Committee Review into HCSIS • Review the Restraint Reports for individuals served by the provider • Review Investigations • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Reporting</p> <ul style="list-style-type: none"> • Read-only access to the submitted/finalized Incident Report, Area and Regional Management Review, and Process Management screens <p>Medication Occurrences</p> <ul style="list-style-type: none"> • Read-only access to finalized MOR and the Regional MAP Review <p>Restraint Reporting</p> <ul style="list-style-type: none"> • Update access to the HR Committee Review • Read-only access to finalized Restraint Report, finalized Restraint Manager Review, Area Management Review, and finalized Commissioner's Review <p>Investigations</p> <ul style="list-style-type: none"> • Read-only access to the Process Management Screen, the Intake, the Disposition Notice, and the Action Plan
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Restraints Quick Guide • Investigations Quick Guide for Providers • Incident Management Filing and Review Process Quick Guide • Reports User Guide



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ROLE NAME	IM Data Entry Role
ROLE DESCRIPTION	<p>This role can create incident reports, restraint reports, medication occurrence reports, and optionally available events in HCSIS and data enters information about the event.</p> <p>Note: This is strictly a data entry role. This role does not have the ability to submit the Initial Incident report, finalize the Final Incident Report, finalize the Restraint Report, finalize a Medication Occurrence Report or view any of the management review screens for these modules.</p>
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated staff in a provider organization responsible for entering incident reports, restraint reports and medication occurrence reports.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and data enter an Incident Report • Save the Incident Report to be reviewed by a supervisor before it is submitted/finalized • Create and data enter a Medication Occurrence Report • Save a Medication Occurrence Report to be reviewed by a supervisor before it is finalized • Create and data enter a Restraint Report • Save the Restraint Report to be reviewed by a supervisor before it is finalized • Create and data enter an Optionally Reportable Event • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Management</p> <ul style="list-style-type: none"> • Update access to Initial Report, Final Report, and Optionally Reportable Event <p>Medication Occurrences</p> <ul style="list-style-type: none"> • Update access to the Medication Occurrence Report <p>Restraints</p> <ul style="list-style-type: none"> • Update access to the Restraint Report



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ROLE NAME	IM Data Entry Role
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none">• Incident Management Submitting the Initial Report Quick Guide• Incident Management Completing the Final Report Quick Guide• Medication Occurrence Report (MOR) Quick Guide• Restraints Quick Guide• Reports User Guide



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ROLE NAME	IM Staff Role
ROLE DESCRIPTION	This role can create and submit initial incident reports & medication occurrence reports, compile final incident reports, submit extension notification, compile optionally reportable event reports and view reports in HCSIS
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated staff in a provider organization responsible for entering incident reports and medication occurrence reports.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and Submit an Initial Incident Report • Compile and Save the Final Report for review by a supervisor before it is finalized • File an Incident Report Extension • Create a Medication Occurrence Report • Save a Medication Occurrence Report for review by a supervisor before it is finalized • Create and data enter an Optionally Reportable Event • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Reporting</p> <ul style="list-style-type: none"> • Update access to Initial Report, Final Report, and Optionally Reportable Event • Read-only access to the Area & Regional Management Review <p>Medication Occurrences</p> <ul style="list-style-type: none"> • Update access to the Medication Occurrence Report • Read-only access to the Regional MAP Review
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Incident Management Submitting the Initial Report Quick Guide • Incident Management Completing the Final Report Quick Guide • Incident Management Filing an Extension Quick Guide • Medication Occurrence Report (MOR) Quick Guide • Reports User Guide



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ROLE NAME	IM Supervisor Role
ROLE DESCRIPTION	This role can finalize incident reports, restraint reports, medication occurrence reports, and optionally reportable events and communicates with the Area Office and Regional Office staff regarding the event.
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated supervisory staff in a provider organization responsible for reviewing and submitting/finalizing incident reports, restraint reports and medication occurrence reports.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Review and submit the Initial Report of the Incident • Review and finalize the Final Report of the Incident • Filing an Incident Report Extension • Restrict access to an Incident Report in HCSIS, if necessary • Review and finalize the Medication Occurrence Report • Review and finalize the Restraint Report • Review and finalize an Optionally Reportable Event • Delete an Optionally Reportable Event • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Reporting</p> <ul style="list-style-type: none"> • Update access to Initial Report and Final Report, and Optionally Reportable Event • Read-only access to the Area & Regional Management Review and Process Management Screens <p>Medication Occurrences</p> <ul style="list-style-type: none"> • Update access to the Medication Occurrence Report • Read-only access to the Regional MAP Review <p>Restraint Reporting</p> <ul style="list-style-type: none"> • Update access to the Restraint Report • Read-only access to the finalized Restraint Manager Review, Area Management Review and finalized HR Committee Review



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ROLE NAME	IM Supervisor Role
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none">• Incident Categories• Incident Management Guidelines• Incident Management Submitting the Initial Report Quick Guide• Incident Management Completing the Final Report Quick Guide• Incident Management Filing an Extension Quick Guide• Incident Management Filing and Review Quick Guide• Medication Occurrence Report (MOR) Quick Guide• Restraints Report Quick Guide• Reports User Guide



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ROLE NAME	Provider/State HCR Read Only Role
ROLE DESCRIPTION	This role can view an individual's Health Care Record.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	Designated staff in a private or state operated residence who needs read-only access to health care record information in order to perform their job responsibilities.
KEY ACTIVITIES	<ul style="list-style-type: none"> • View Health Care Records • Request and review Management Reports
SYSTEM ACCESS	Health Care Record <ul style="list-style-type: none"> • Read-only access to Health Care Records
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Health Care Record Quick Guide • Reports User Guide



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ROLE NAME	Restraint Manager
ROLE DESCRIPTION	This role can review and finalize Restraint Reports in HCSIS.
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated supervisory staff in a provider agency responsible for finalizing Restraint Reports.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and finalize the Restraint Manager Review • Review the Restraint Reports for individuals served by the provider
SYSTEM ACCESS	Restraint Reporting <ul style="list-style-type: none"> • Update access to the Restraint Manager Review • Read-only access to finalized Restraint Report, Area Management Review, finalized HR Committee Review, and finalized Commissioner’s Review
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Restraints Quick Guide • Incident Management Filing and Review Process Quick Guide • Reports User Guide



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ROLE NAME	Restricted Provider IM Data Entry Role
ROLE DESCRIPTION	<p>This role can create incident reports, restraint reports, medication occurrence reports, and optionally reportable events in HCSIS and data enters information about the event.</p> <p>This role is strictly a data entry role – it does not have access to the Reports Menu nor does it receive any Alerts. This role is very similar to the IM Data Entry Role. One of the main differences in the two roles is that the Restricted IM Data Entry Role can only modify an event that the user created; the IM Data Entry Role can modify an event created by any user.</p>
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated staff in a provider organization responsible for entering incident reports, restraint reports and medication occurrence reports.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and data enter an Incident Report • Save the Incident Report to be reviewed by a supervisor before it is submitted/finalized • Create and data enter a Medication Occurrence Report • Save a Medication Occurrence Report to be reviewed by a supervisor before it is finalized • Create and data enter a Restraint Report • Save the Restraint Report to be reviewed by a supervisor before it is finalized • Create and data enter an Optionally Reportable Event • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Management</p> <ul style="list-style-type: none"> • Update access to Initial Report, Final Report, and Optionally Reportable Event <p>Medication Occurrences</p> <ul style="list-style-type: none"> • Update access to the Medication Occurrence Report <p>Restraints</p> <ul style="list-style-type: none"> • Update access to the Restraint Report



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ROLE NAME	Restricted Provider IM Data Entry Role
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none">• Incident Management Submitting the Initial Report Quick Guide• Incident Management Completing the Final Report Quick Guide• Medication Occurrence Report (MOR) Quick Guide• Restraints Quick Guide



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ROLE NAME	State Op Nursing Supervisor Role
ROLE DESCRIPTION	This role can review certain Incident Management, Medication Occurrence, and Restraint documents, all Death Reporting documents and can update and review the Death Report.
SCOPE TYPE	State Operated Residence Only
ROLE MAY APPLY TO	Nursing Supervisor at a State Operated Residence
KEY ACTIVITIES	<ul style="list-style-type: none"> • Review Incident Reports, Medication Occurrence Reports, and Restraint Reports on individuals served by the provider • Create and Finalize Death Reports on individuals served by the state operated residence • Request and review Management Reports
SYSTEM ACCESS	<p>Incident Management</p> <ul style="list-style-type: none"> • Read-only access to the submitted/finalized Incident Report, Area and Regional Management Review, and Process Management screens <p>Medication Occurrence</p> <ul style="list-style-type: none"> • Read-only access to finalized MOR and Regional MAP Review <p>Restraints</p> <ul style="list-style-type: none"> • Read-only access to finalized Restraint Report, finalized Restraint Management Review, Area Management Review, finalized HR Committee Review and finalized Commissioner's Review. <p>Death Reporting</p> <ul style="list-style-type: none"> • Update access to create and finalize Death Report • Read-only access to finalized Investigations Review and finalized Death Report Review
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Death Reporting Quick Guide • Incident Management Filing and Review Process Quick Guide • Restraints Quick Guide



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ROLE NAME	Provider Investigations Designee
ROLE DESCRIPTION	This role can review Investigations Cases that are the result of a DPPC Intake where the ALAB is from the provider organization.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	The Executive Director or their designee of a provider organization responsible for the oversight of all Investigations activities.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Review investigations • Request and review Management Reports
SYSTEM ACCESS	Investigations <ul style="list-style-type: none"> • Read-only access to the Process Management Screen, the Intake, the Disposition Notice, the Administrative Review, the Decision Letter and the Action Plan
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Investigations Quick Guide for Providers • Reports User Guide



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ROLE NAME	Provider/State Data Extract Request Role
ROLE DESCRIPTION	This role requests and downloads Data Extracts from HCSIS. Data Extracts is a tool in HCSIS that allows users (DDS Staff and providers) to download HCSIS data in the form of a Microsoft Access database for the purpose of querying and reporting.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	Designated MIS or other technical individual at the agency who is familiar with Microsoft Access.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Develop Microsoft Access reports and queries to manipulate the data obtained from HCSIS
SYSTEM ACCESS	Data Extracts <ul style="list-style-type: none"> • Request and Download Data Extracts
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Data Extracts Data Dictionary



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ROLE NAME	Provider Administrator for Enhanced Security
ROLE DESCRIPTION	This role maintains the user's access rights to individuals served by their agency. The optional Enhanced Security feature allows a provider to associate individual consumers to particular programs or locations (also known as a Security Group) and to also associate staff to those same programs and locations, effectively limiting the scope for those staff.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	Designated staff with the technical expertise to manage user access for a web-based application.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Maintain individual assignment to a Security Group • Maintain user assignment to a Security Group • Turn Enhanced Security on/off
SYSTEM ACCESS	Enhanced Security Management <ul style="list-style-type: none"> • Update access to Individual to Security Group screen • Update access to Security Group to Individual screen • Update access to User to Security Group screen • Update access to Security Group to User screen • Update access to Enhanced Security Settings screen • Request and review Enhanced Security Reports
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • User Guide – Provider Administration Enhanced Security • Reports User Guide



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ROLE NAME	Provider ISP Data Entry Role
ROLE DESCRIPTION	<p>This role can create and edit goals, objectives and supports agreements and assessments.</p> <p>Note: This is strictly a data entry role. This role does not have the ability to submit the above documents.</p>
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated staff in a provider organization responsible for any of the key ISP planning activities: entering goals, objectives and supports agreements and assessments.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and data enter goals, objectives and supports agreements and assessments. • Create and data enter objectives and supports agreements related to a goal created by any provider agency or the service coordinator. • Save goals, objectives and supports agreements and assessments to be reviewed by a supervisor before they are submitted to DDS. • Edit and delete goals, objectives and supports agreements and assessments created by their provider agency only. • View Vision and planned meeting information. • View goals, objectives and supports agreements and assessments created by other provider agencies and DDS staff.
SYSTEM ACCESS	<ul style="list-style-type: none"> • Alerts • Review Process Management Screen
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • TBD



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ROLE NAME	Provider ISP Supervisor Role
ROLE DESCRIPTION	This role can create, edit, review and submit goals, objectives and supports agreements and assessments.
SCOPE TYPE	Private and State Operated Providers
ROLE MAY APPLY TO	Designated staff in a provider organization responsible for the data entry, review and submission of any of the key ISP planning activities: goals, objectives and supports agreements and assessments.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Create and data enter goals, objectives and supports agreements and assessments. • Create and data enter objectives and supports agreements related to a goal created by any provider agency or the service coordinator. • Save goals, objectives and supports agreements and assessments. • Edit and delete goals, objectives and supports agreements and assessments created by their provider agency only. • Review and submit goals, objectives and supports agreements and assessments created by their provider agency only. • View Vision and planned meeting information. • View goals, objectives and supports agreements and assessments created by other provider agencies and DDS staff.
SYSTEM ACCESS	<ul style="list-style-type: none"> • Alerts (Over-due Alerts and the 30-day post ISP reminder only) • Review Process Management Screen
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • TBD



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ROLE NAME	Local HCSIS Admin
ROLE DESCRIPTION	This role maintains the HCSIS user accounts and provides user support for all individuals requiring HCSIS access within their particular agency. The agency will identify at least one person assigned the Local HHCSIS Admin role.
SCOPE TYPE	Private or State Operated Provider
ROLE MAY APPLY TO	Designated staff with the technical expertise to manage user accounts for a web-based application.
KEY ACTIVITIES	<ul style="list-style-type: none"> • Maintain user role assignments in HCSIS • Serve as an internal point of contact for users with questions about system access including resetting passwords • Assign “Scope Deactivated” role to staff who is no longer authorized to use HCSIS for security or other reasons
SYSTEM ACCESS	User Administration <ul style="list-style-type: none"> • Update access to User Role Selection screen • Read-only access to User Review screen • Request and view HCSIS Administration Reports
HCSIS SYSTEM DOCUMENTATION	<ul style="list-style-type: none"> • Virtual Gateway HCSIS Roles Guide



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Roles-At-A-Glance

HEALTH CARE RECORD DETAILED ROLE ACCESS

<i>Provider/State OP Enter/Edit Functions</i>	HCR Data Entry	HCR Supervisor	HCR Read Only
Create & Update HCR	XX	XX	
Finalize HCR		XX	
<i>HCR View Only Functions</i>			
View HCR	XX	XX	XX



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INVESTIGATIONS DETAILED ROLE ACCESS

<i>Provider/State OP View Only Functions</i>	Investigations Dir/Designee	Human Rights Coordinator
Process Management	XX	XX
Disposition Notice	XX	XX
Provider Redacted Intake	XX	
HRC Redacted Intake	XX	XX
Decision Letter Notice	XX	
Administrative Review	XX	
Action Plan	XX	XX
Action Plan Notice	XX	



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INCIDENT MANAGEMENT DETAILED ROLE ACCESS

<i>Provider/State OP Enter/Edit Function</i>	HRC	Ex. Dir or Designee	IM Data Entry *	IM Staff	IM Superv.	St. Op. Nrsng. Suprv.
Create/ Compile Initial Report			XX	XX	XX	
Submit Initial Report				XX	XX	
Compile Final Report			XX	XX	XX	
Finalize Final Report					XX	
Compile Area Management Review						
Finalize Area Management Review						
Compile Regional Management Review						
Finalize Regional Management Review						
Mark an Incident as Confidential					XX	
Extension Notification				XX	XX	
Delete Incident						
Compile ORE			XX	XX	XX	
Finalize ORE					XX	
<i>IM View Only Functions</i>						
Filing-Agency Process Management	XX	XX			XX	XX
Review-Agency Process Management	XX	XX			XX	XX
View Submitted Initial Report	XX	XX		XX	XX	XX
View Finalized Final Report	XX	XX		XX	XX	XX
View Area Management Review	XX	XX		XX	XX	XX
View Regional Management Review	XX	XX		XX	XX	XX
View Finalized ORE Reports		XX	XX	XX	XX	
Reports	XX	XX	XX	XX	XX	XX

* Same applies to the Restricted Provider IM Data Entry Role



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MEDICATION OCCURRENCE DETAILED ROLE ACCESS

<i>Provider/State OP Enter/Edit Function</i>	HRC	Ex. Dir or Designee	IM Data Entry *	IM Staff	IM Supervisor	St. Op. Nursing Supervisor
Create/Compile MOR			XX	XX	XX	
Finalize MOR				XX	XX	
Compile Regional Management Review						
Finalize Regional Management Review						
Delete MOR						
<i>MOR View Only Functions</i>						
Filing-Agency Process Management	XX	XX			XX	XX
Review-Agency Process Management	XX	XX			XX	XX
View Finalized MOR	XX	XX		XX	XX	XX
View Regional MAP Review	XX	XX		XX	XX	XX
MOR Detailed Report	XX	XX		XX	XX	XX
MOR Summary Report	XX	XX		XX	XX	XX

** Same applies to the Restricted Provider IM Data Entry Role*



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RESTRAINT DETAILED ROLE ACCESS

<i>Provider/State. OP Enter/Edit Functions</i>	HRC	Restraint Manager	Ex. Dir. or Designee	IM Data Entry *	IM Supervisor	St. Op. Nursing Supervisor
Create/Compile Restraint Report				XX	XX	
Finalize Restraint Rept.					XX	
Create/Compile Restraint Mgr. Review		XX				
Finalize Restraint Manager Review		XX				
Compile Area Management Review						
Finalize Area Management Review						
Create/Compile HR Committee Review	XX					
Finalize HR Committee Review	XX					
Create Compile Commissioner's Review						
Finalize Commissioner's Review						
Delete Restraint						
<i>Restraint View Only Functions</i>						
Filing-Agency Process Management	XX	XX	XX		XX	XX
Review-Agency Process Management	XX	XX	XX		XX	XX
View Finalized Restraint Report	XX	XX	XX		XX	XX
View Finalized Restraint Manager Review	XX	XX	XX		XX	XX
View Area Management Review	XX	XX	XX		XX	XX
View Finalized HR Committee Review	XX	XX	XX		XX	XX
View Finalized Commissioner's Review	XX	XX	XX			XX
View Restraint Detail Report	XX	XX	XX		XX	XX

* Same applies to the Restricted Provider IM Data Entry Role



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ISP DETAILED ROLE ACCESS

<i>Provider/State OP Create/Edit/View Functions</i>	ISP Data Entry	ISP Supervisor
View Vision Statement	XX	XX
Create Goals	XX	XX
Edit/Remove Goals created by own provider agency	XX	XX
Submit Goals created by own provider agency		XX
View Goals created by another provider agency	XX	XX
Create Assessments	XX	XX
Edit/Remove Assessments created by own provider agency	XX	XX
Submit Assessments		XX
View Approved Assessments submitted by another agency	XX	XX
View Planned Meeting Information	XX	XX
Create Objectives and Supports Agreements	XX	XX
Edit/Remove OSA's created by own provider agency	XX	XX
Submit Objectives and Supports Agreements		XX
View Approved Assessments and Support Agreements submitted by another agency	XX	XX
View Review Process Management	XX	XX
Overdue Alerts	XX	XX
30 Day post ISP Alerts	XX	XX
All other provider Alerts	XX	

Notes:

- Neither of these roles gives the user the ability to modify an individual's Health Care Record.