



*Executive Office of Health and Human Services
Provider Data Management (PDM)
Deployment Checklist*

Provider Data Management (PDM) & Salary Reserve

PDM presents a consolidated view of a provider's organizational structure, financial health, state contract activity, and certain performance measures and licensing information. Providers can also submit the necessary payroll information required to support the allocation of the Salary Reserve.

The Salary Reserve section of the Provider Data Management (*PDM*) Service collects payroll data from providers and facilitates the distribution of funds to Purchase of Service contractors who provide human and social services to Commonwealth clients. The Salary Reserve web application provides Purchase of Service (POS) providers and EOHHS agency staff with access to real-time data over the internet. The Salary Reserve web application will be the system of record for all of the Salary Reserve data content. This application will be made available whenever Salary Reserve is part of the Budget.

The Executive Office of Health and Human Services has developed this checklist of “things to do” in order to ensure a smooth deployment, based on your status below:

❖ **NEW TO VIRTUAL GATEWAY(VG)**

Have never used the Virtual Gateway for PDM, or any other business service on VG.

- **Read, sign & return the EOHHS Virtual Gateway Services Agreement**
- **Read, sign & return the EOHHS Virtual Gateway Access Administrator Designation Form**
- **Complete and email the PDM Salary Reserve User Request Form identifying who the PDM Data Entry Administrator will be in your organization.**

❖ **NEW TO PDM**

Currently have access to the Virtual Gateway for other business service(s) not including PDM.

[May need to make updates to information on application]

- **Complete and email the PDM Salary Reserve User Request Form (URF) identifying who the PDM Data Entry Administrator will be in your organization.**
- **Updates to legal forms (if needed)**

❖ **EXISTING TO VG & PDM**

Currently have access to the Virtual Gateway for other business service(s) including PDM. [May need to make updates to information on application.]

- **Updates to legal forms (if needed)**
- **Updates to User Account Request Forms (if needed)**

Once you have access to PDM you will be asked to identify a Salary Reserve Contact. Please see the Salary Reserve 2015 Reference Guide on the Salary Reserve website: [.mass.gov/](http://mass.gov/)



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1. Assign a Provider Data Management Liaison – This individual will be responsible for ensuring that your organization identifies the individuals who should obtain security passwords, distribution of orientation and training materials and activates this service within two weeks of the scheduled activation date.

2. Read and sign the EOHHS Virtual Gateway Services Agreement

The EOHHS Virtual Gateway Services Agreement sets forth the terms and conditions to which your organization must agree in order to obtain access to the Virtual Gateway. The EOHHS Virtual Gateway Services Agreement must be signed by an officer of your organization who has the legal authority to sign on behalf of your organization, as evidenced by your organization’s charter or bylaws.

3. Read and sign the EOHHS Virtual Gateway Access Administrator Designation Form

Each organization must designate an individual to be an “Access Administrator” for the Virtual Gateway. Access Administrators are the liaisons between EOHHS and the organization and its users for issues relating to account information and general access. Specifically, the Access Administrator is responsible for approving, modifying, or removing user access privileges to the Virtual Gateway. Information about the Access Administrator must be included in the Access Administrator Designation Form, which must be signed by the Access Administrator(s) and an officer of your organization who has the legal authority to sign on behalf of your organization, as evidenced by your organization’s charter or bylaws.

4. Complete and email the PDM Salary Reserve User Request Form (URF)

In order to assign individual account information, the Access Administrator must complete a User Account Request Form. The information required by this Form is used to add, change, or delete individual user accounts for all business services accessed through the Virtual Gateway. The Access Administrator may submit user account requests to Virtual Gateway Operations on an on-going basis. All requests for individual user access are subject to EOHHS’ approval.

Email to: @massmail.state.ma.

There are two security profiles within the Provider Data Management Service. Each provider will be allowed a maximum of four accounts. The roles and responsibilities are as follows:

- **Provider Data Entry Administrator** – This profile will allow a staff member to view and update information within the Provider Data Management service. We strongly recommend that you assign two individuals with update capability; a primary and a backup. Person with this role will be able to designate a Salary Reserve Administrator on PDM service.
- **Provider Reviewer** – This profile will enable staff members to view all of the information available but not make any edits on the system.

Please send the EOHHS Virtual Gateway Services Agreement and the EOHHS Virtual Gateway Access Administrator Designation Form to the following address:

**EOHHS Virtual Gateway Operations - Deployment
100 Hancock Street
Quincy, Massachusetts 02171**