## STEP-BY-STEP PROCESS FOR ACCESS RECERTIFICATION

3/29/2023

## **GET STARTED RIGHT AWAY**

-1<sup>st</sup> week: make sure your staff has completed all required training.

-If not, email now and have them complete in a week.

-It takes 2-3 days for training records to migrate into ARS.

-Then log in to recertify. 6-9 simple steps below.

-You cannot attest for yourself. Coordinate with your backup.

- Log in to <u>Access Recertification System</u>. Use your pw# or x1#. Use your network password (state) or ARS password (county). You will land on "Overview."
- Then, click on "Dashboard" icon at top under Overview (see arrow).
   The left navigation list will open (see image below).
- 3. On left navigation list, click on "Access Recertification" (note: it may have opened automatically for you—near top)
- 4. Then click on "Bulk Attestation" (near bottom of list—highlighted, see arrow).

1 Overview	Click the button to get all records available to you					
Dashboard	Get All Records	Save Current Page	Submit Current Page	<-Previous Page	Next Page->	
Access Recertification	Search Fields Search 1 Search Fields Search 2					
Merged Data	System NONE   Submitted Any  Action Any  Compliance Any					
Recertification Period	Save Current Page Submit Current Page					
Attestation						
Bulk Attestation						
Reports						

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Please DO NOT wait until last 2 weeks. Issues/problems can arise including illness and absence. Access will be turned off for noncompliance.



5. Choose the System by clicking "System" drop down (see arrow below). Change "NONE" to "PRISM" or the system being recertified. You will only have one choice—the system being recertified.

1 Overview	Click the button get all records available to you
Dashboard	Get All Records Save Current Page Submit Current Page <- Previous Page Next Page->
Access Recertification	Search Fields Search 1 Search Fields Search 2
Merged Data	System PRISM   Submitted Any  Action Any  Compliance Any
Recertification Period	Save Current Page Submit Current Page
Attestation	
Bulk Attestation	

- Next, get your staff records. Click "Get all Records" (above, top left button, highlighted & arrow). All your staff will show up, with a "compliant" or "non-compliant" status for each person. Compliant means they have completed training (see example circled below).
  - Also, verify that they have the correct role (listed in Security Groups—circled below).
  - Approve <u>only</u> if they need access to the system, have the right roles, and are compliant.

1 Overview	Click the button to get all records available to you				
Dashboard	Get All Records Save Current Page Submit Current Page <- Previous Page Showing 0 - 17 Next Page->				
Access Recertification	Search Fields Search 1 Search 2 Search 2				
Merged Data	System MMIS V Submitted Any Action Any V Compliance Any V				
Bulk Attestation	System = MMIS   Login ID = pwtest11 Name = James Test11 Phone =  Email = Supervisor Name = Patrick Cleveland Supervisor Phone = Supervisor Phone = Supervisor Phone = NonCompliant Security Groups = aces apes asps				
Reports					
Configuration	Submitted = No Approve O Change O Delete				
<					

- 7. If you have more staff to complete and approve at another time, hit "SAVE Current Page."
- 8. When all staff have completed training and are ready to approve, log back in. Choose system. Then get all records. Finish approving. This time, do NOT hit "SAVE Current Page." Instead, just click "SUBMIT Current Page."
- If you need to change something after you have submitted everything, you will have to log back in, add a reason for the change in the white "notes" area, make whatever change you need, and ONLY click "Submit Current Page" (second arrow).

## APPENDIX: ALTERNATE METHOD TO CHECK STAFF TRAINING STATUS AND ROLE DEFINITIONS

1. Go to left navigation and click "Dashboard" (icon under Overview).

2. See "Documentation" widget in upper right corner of Dashboard (see arrow).

- Check *Training Compliance Report* (see circled list) for the application being recertified.
- Check User Guide for Security Liaisons and Supervisor's Appendix (circled) for role definitions.

A	Dashboard		+ Create new
	Application Recertification Home Page	Current Recertification Overview - MAXIS_M	MEC2 Current Recertification Overview - MMIS Systems Summary
=			Hake as def
	Announcements	^	Documentation
<b>¢</b> >	PRSIM Recertification to take place April 3 What is new in the Application Recertifical A new field is available in the report Secur "Recertify?" and is marked "Y" to indicate Users who are granted application access a be added in the next year's recertification, recertification.	, 2023 through May 5, 2023 ion System? ity Liaisons-Review Data. The field is the users who need to be recertified. after the recertification period begins will so they will not appear in the current	State Supervisors, County Lisicone – Links to User Guides: Application Recertification Process - Quick User Guide Application Recertification Process - User Guide for Security Liaisons and State Supervisors Links to Reports: <u>MMIS – Training Compliance</u> <u>MMIS – Security Liaisons - Review Data</u> PRISM – Training Compliance
	Frequently Asked Questions	^	PRISM – Security Liaisons - Review Data MAXIS-MEC2 – Training_Compliance MAXIS_MEC2 – Security Liaisons - Review