



## Summary

### Objective

The objective of this process is to:

- identify NZHSRA digital certificates which are due to expire
- confirm whether the digital certificate needs to be renewed, revoked or amended
- request renewal or revocation of digital certificate if required

### Background

This process is performed by ACC on behalf of NZHSRA.

If requested, registered NZHSRA users are issued digital certificates (DCs). DCs enable them to access certain MOH/ACC secure sites and exchange data securely over the internet. A digital certificate has a life of one year. At the end of that year if not renewed the digital certificate will expire.

Owner Name Withheld

Expert Name Withheld

## Procedure

### 1.0 Run Salesforce Renewals report

Provider Vendor Administrator

- In Salesforce, open the "SF Renewals" report
- Customise the report, changing the two "Expiry Dates" for the appropriate month
- Save the changes to the report format
- Run the report
- Export the details of the Salesforce Report (A spreadsheet version of the report should open automatically)
- Copy the spreadsheet and paste into the "SF Report" worksheet in the Renewals workbook

**NOTE What is the Renewals workbook?**

It is a spreadsheet that takes the data sent from HealthLink, pairs it with the Salesforce renewals data, formats it and subset the data to identify the Digital Certificates that require renewal. Instructions on how to manage monthly renewals is located within the spreadsheet

### 2.0 Confirm Digital Certificates due for renewal

Provider Vendor Administrator

- Save the Health Link monthly renewals spreadsheet in the appropriate folder in the I Drive

**NOTE What is the Health Link monthly renewals spreadsheet?**

A spreadsheet sent from Health Link showing digital certificates which are due to expire in 1-2 months time

- Copy the spreadsheet and paste into the "Renewals" worksheet in the Renewals workbook

- In the Renewals workbook, run the Renewals Macro to identify digital certificates due for renewal.

**NOTE Why do I need to run the Renewals Macro?**

- The macro will create worksheets for each DHB and the Renewals worksheet will show just those digital certificates that require renewal
- The file is automatically saved under the correct YEAR with the correct MONTH for the data, into the correct worksheet tab

### 3.0 Send renewal reminders

Provider Vendor Administrator

- Review Renewals worksheet to identify digital certificates due for renewal

**NOTE What if the renewal is for a DHB on a Site Certificate?**

It should automatically be renewed. Refer to the Special Instructions document in the I-Drive to view DHB's that are on a Full/Part Site Certificate.

- Using the Renewal reminder template, send reminder email

**NOTE What email address should I send it from?**

From the Registration Authority email profile

**NOTE What if the email address is a default or incorrect email address?**

Contact the recipient via phone.

### 4.0 Request renewal of digital certificate(s)

Provider Vendor Administrator

- Review response from customer

**NOTE What if you don't receive a response?**

If no response, send another reminder the following month. If still no response, the certificate will automatically expire.

- Update Salesforce and spreadsheet confirming digital certificate is to be renewed.

**NOTE What if the digital certificate does not need to be renewed?**

No action required. The certificate will automatically expire

**NOTE What if the digital certificate needs to be revoked?**

In Salesforce, revoke the digital certificate

**NOTE What if the user details need to be changed?**

In Salesforce, update the relevant details

- File away email response in sub folder "Renewal replies" in Registration Authority Inbox. This process ends.