

Identity Access Management Portal For Accessing eMedNY Apps

User Guide

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1. Overview

This manual will provide the following to providers and credentialing staff:

- A description of the Identity Access Management (IAM) Portal for accessing eMedNY provider-related apps
- Steps to create an eMedNYID
- Instructions for using the eMedNYID and the IAM Portal
- Instructions for updating and maintaining an eMedNYID
- Common log-in issues and how to troubleshoot them

1.1. How to Use this Manual

In addition to informational and instructional language, this manual contains:

- *Tables*: From Section 3 onward, steps or functionality that may be possible within the application are highlighted. Section numbers (3.1, for example) indicate the Manual location that contains additional information.
- *Figures*: Screenshots illustrating the particular topic.

1.2. Release Notes

This section contains release notes for the IAM Portal.

Table 1 - Applications Available through the IAM Portal List

Release Number	Manual Version	Release Notes
1.0	2022-1 (3/31/2022)	Initial release of the IAM Portal.

2. The IAM Portal

The IAM Portal is an Okta-based single-sign on access management solution for logging into apps. This enables users to access authorized apps utilizing the same User ID and password.

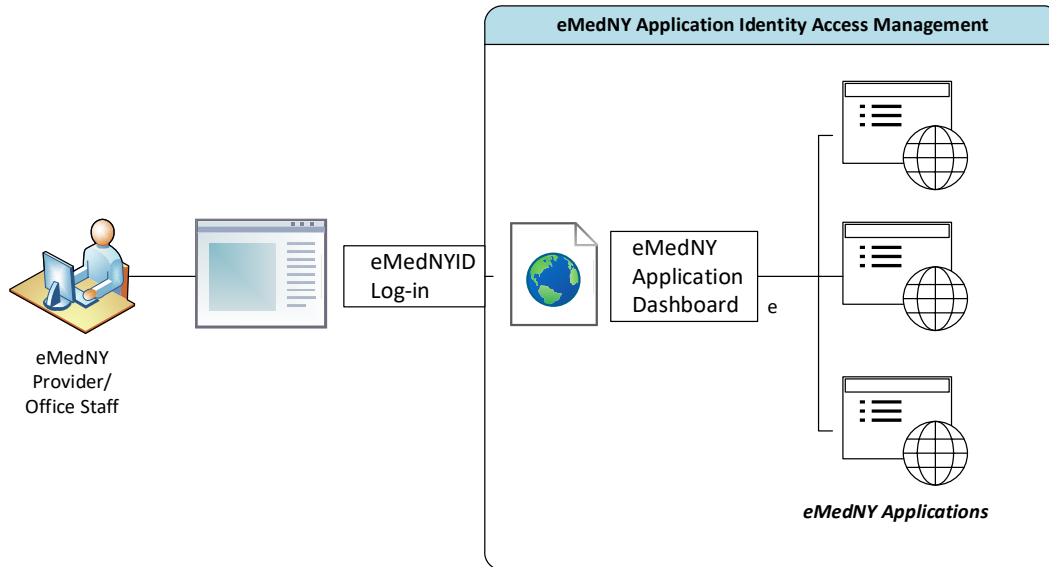


Figure 1 - Diagram of eMedNY Application IAM Portal Workflow

2.1. Apps Available Through the IAM Portal

The column on the left lists those apps which are accessible only through the IAM Portal. Apps listed in the right-hand column must be accessed by current user log-in methods. For further information on all apps, refer to the [eMedNY Tools Center](#).

Table 2 - Apps Available Through the IAM Portal

Apps Available Through the IAM Portal	Apps Not Available Through the IAM Portal
Provider Enrollment Portal	ePACES
Communications Inbox	eXChange
eMedNY Application Dashboard	Provider Web Portal
	PTAR
	EHR
	PApress
	eMedNY Submitter Dashboard
	Provisional Temporary Provider Enrollment Portal
	Facilities Practitioners NPI Reporting
	Electronic Visit Verification

2.2. Technical Requirements

To create an eMedNYID and utilize the IAM Portal a user must have:

- Internet access
- A modern browser (e.g., Microsoft Edge, Chrome, Firefox, Safari)
- An email address
- One or more Multi-Factor Authentication devices (e.g., a land line, a cell phone, a YubiKey. See **Section 3.2** for more information on each).

3. The IAM Portal eMedNYID

The **eMedNYID** is used to access apps via the IAM Portal.

The eMedNYID is the same as the user’s email address that is submitted in the steps listed in **Section 3.1**, below. The eMedNYID sign up process does not require assistance from the eMedNY Call Center.

All steps detailed in the table below must be completed to successfully create the eMedNYID.

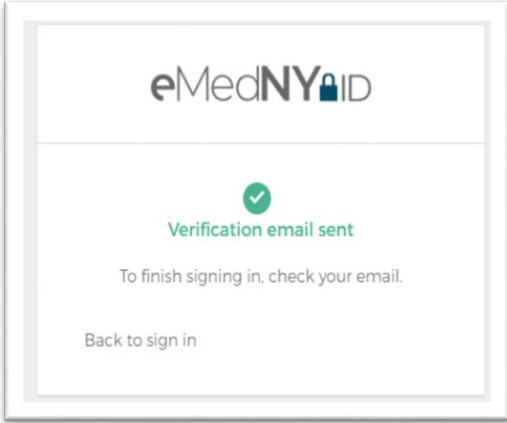
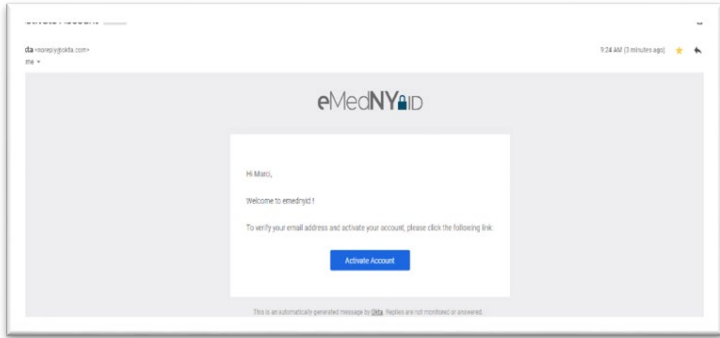
Table 3 - Steps to Create an eMedNYID

Step #	Action	Section
1	Sign up and activate the email and password.	3.1
2	Set up at least one Multi-Factor Authentication method.	3.2
3	Create a security question.	3.3

3.1. Sign Up and Activate the Email and Password

Table 4 - How to Access the IAM Portal, Sign Up and Activate the eMedNYID

Actions	Display
<ol style="list-style-type: none"> 1) Go to https://iam.emedny.org 2) Click Sign Up. 	
<ol style="list-style-type: none"> 3) Enter an email address. 4) Create a password that is at least 16 characters long <i>and</i> has: <ul style="list-style-type: none"> • At least one lowercase letter • At least one uppercase letter • At least one number • At least one symbol (for example: !, @, \$, %, &, *, (,) • Contains no parts of the email address 5) Enter your first and last names. 6) Click Register 	

Actions	Display
<p>Okta sends an email, subject: Activate Account, to the email address entered in step 3, above.</p> <ul style="list-style-type: none"> The eMedNYID account will not be created until it has been verified. The verification email expires after 7 days. Steps 1 through 6 must be repeated if this happens. If the email is not found in the Inbox, check the Spam or Junk folders. 	
<p>7) In the email, click Activate Account</p> <ul style="list-style-type: none"> The eMedNYID has been created. The user may log in to the IAM Portal with this email address and password at any time. The user will be prompted to select at least one Multi Factor Authentication (MFA) method. More details are found in Section 3.2. 	

3.2. Set Up at Least One MFA Method

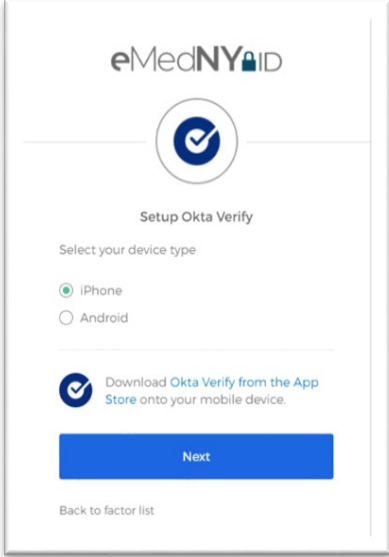
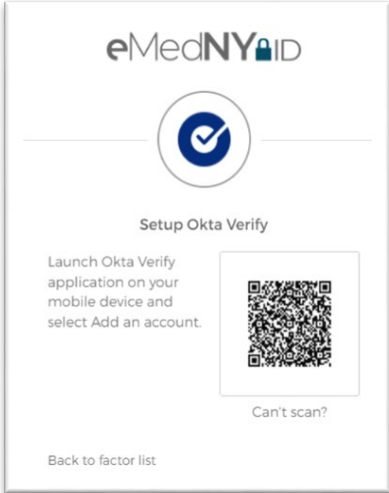
After activating the account, the screen will show a list of valid methods for MFA which are described below.

Table 5 - Description of MFA Methods and Requirements

Method	Description	Technical Requirements	Section
Okta Verify	A downloadable app that receives a push notification from the IAM Portal's Okta. The user must enter the code within the time allotted.	A cell phone	3.2.1
Google Authenticator	A downloadable app that receives a push notification from the IAM Portal's Okta. The user must enter the code within the time allotted.	A cell phone	3.2.2
SMS Authentication	A text message from the IAM Portal's Okta is sent to the user's cell phone. The user must enter the code in Okta.	A cell phone	3.2.3
Voice Call Authentication	The IAM Portal's Okta will call a phone number and recite a six-digit code by voice to the user. The user must enter the code in Okta.	A cell phone or landline	3.2.4
Security Key or Biometric Authenticator	The IAM Portal's Okta will recognize a security key, such as a YubiKey, to authenticate the user.	A security key, biometric authenticator or YubiKey	3.2.5

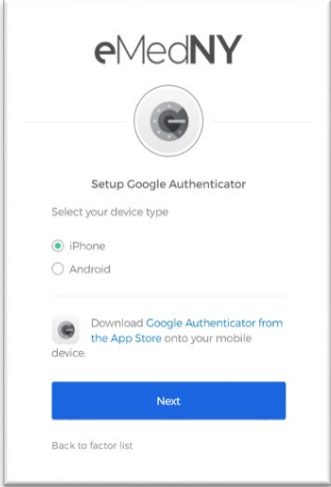
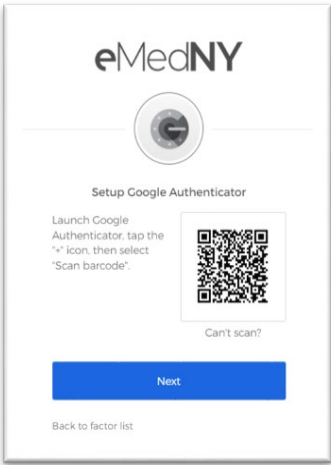
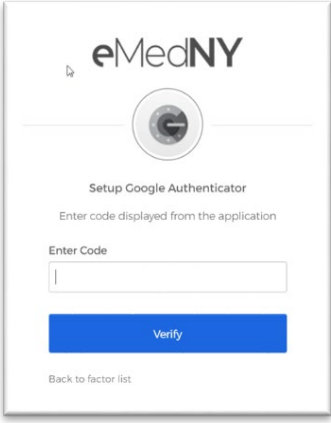
3.2.1. Setting Up Okta Verify

Table 6 - How to Set Up Okta Verify

Actions	Display
<p>1) Select the <i>device type</i>. Okta will provide a link to the corresponding App Store.</p> <ul style="list-style-type: none"> • If Okta Verify is not on the device, click the link and follow the instructions provided. • Once Okta Verify is on the device, click Next. 	
<p>2) Follow the instructions on the screen provided by Okta to add the eMedNYID account to the Okta Verify app on your mobile device.</p> <ul style="list-style-type: none"> • If scanning is not possible, click Can't Scan? to send an activation link via SMS. 	

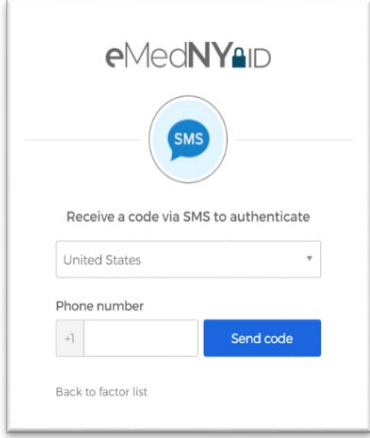
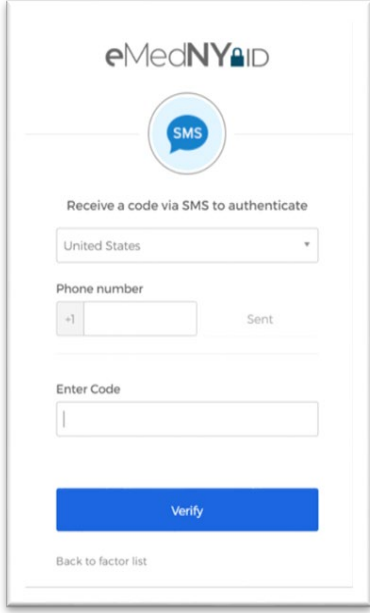
3.2.2. Setting Up the Google Authenticator

Table 7 - How to Set Up the Google Authenticator

Actions	Display
<p>1) Select the <i>device type</i>. Okta will provide a link to the corresponding App Store.</p> <ul style="list-style-type: none"> • If Google Authenticator is not on the device, click the link and follow the instructions provided. • Once Google Authenticator is on the device, click Next. 	
<p>2) Follow the instructions on the screen provided by Okta to add the eMedNYID account to the Google Authenticator app on your mobile device.</p> <ul style="list-style-type: none"> • If scanning is not possible, click Can't Scan? then enter your Okta account username and the provided security key into the Google Authenticator app on your device. <p>3) Click Next.</p>	
<p>4) Enter the code from the Google Authenticator app.</p> <p>5) Click Verify.</p>	

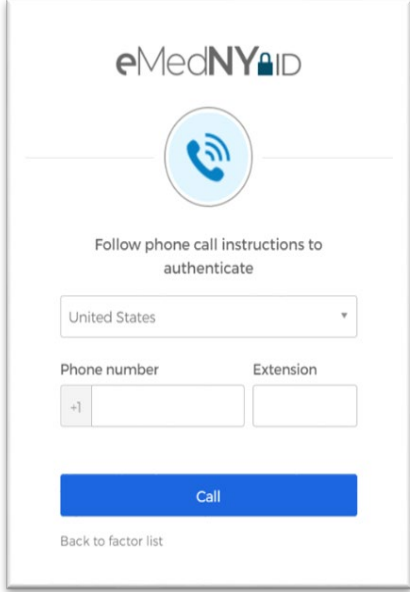
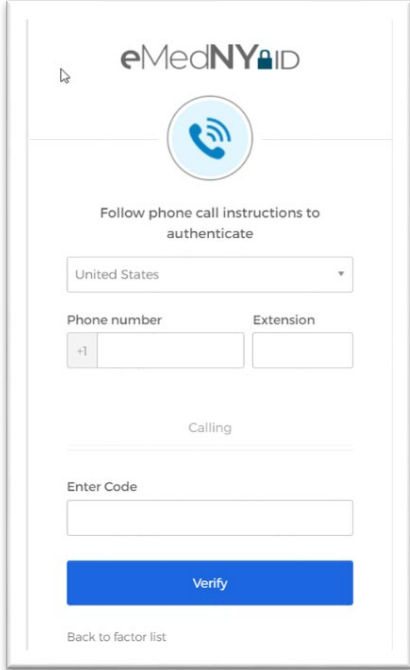
3.2.3. Setting Up the SMS Authenticator

Table 8 - How to Set Up the SMS Authenticator

Actions	Display
<ol style="list-style-type: none"> 1) Enter the full phone number. Leading 1 is not necessary. 2) Click Send Code. 	
<ol style="list-style-type: none"> 3) Enter the code from the SMS notification. 4) Click Verify. 	

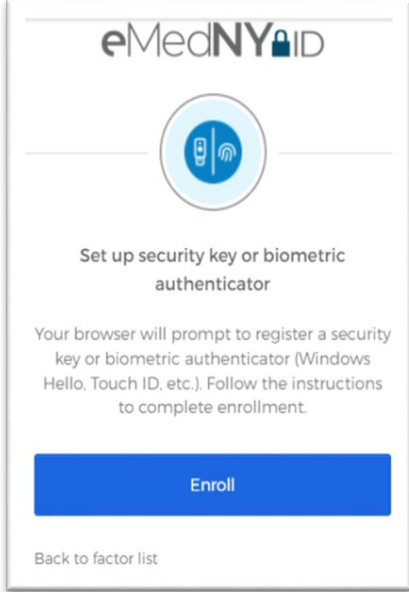
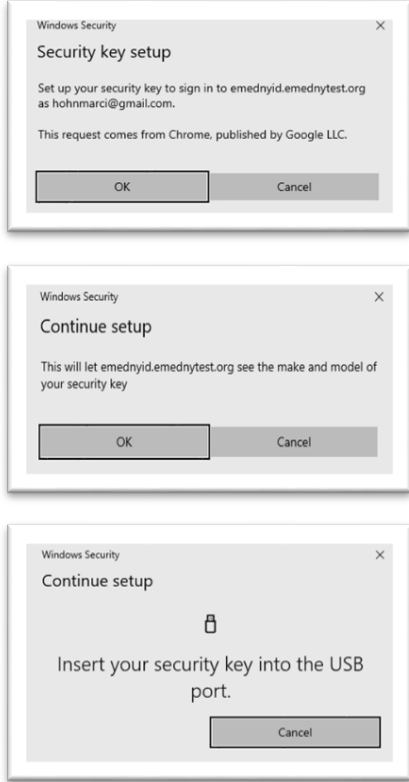
3.2.4. Setting Up the Voice Call Authenticator

Table 9 - How to Set Up the Voice Call Authenticator

Actions	Display
<ol style="list-style-type: none"> 1) Enter the full phone number. Leading 1 is not necessary. 2) Enter the extension, if applicable. 3) Click Call. 	
<ol style="list-style-type: none"> 4) Enter the code from the voice call. 5) Click Verify. 	

3.2.5. Setting Up the Security Key or Biometric Authenticator

Table 10 - How to Set Up the Security Key or Biometric Authenticator

Actions	Display
<p>1) Click Enroll.</p>	
<p>2) Follow and click OK from the on-screen prompts.</p> <p>3) Insert your security key into the USB port.</p> <ul style="list-style-type: none"> • If already inserted, tap the security key. 	

3.2.6. Last Steps

When all desired MFA methods for the eMedNYID have been set up, click **Finish**.

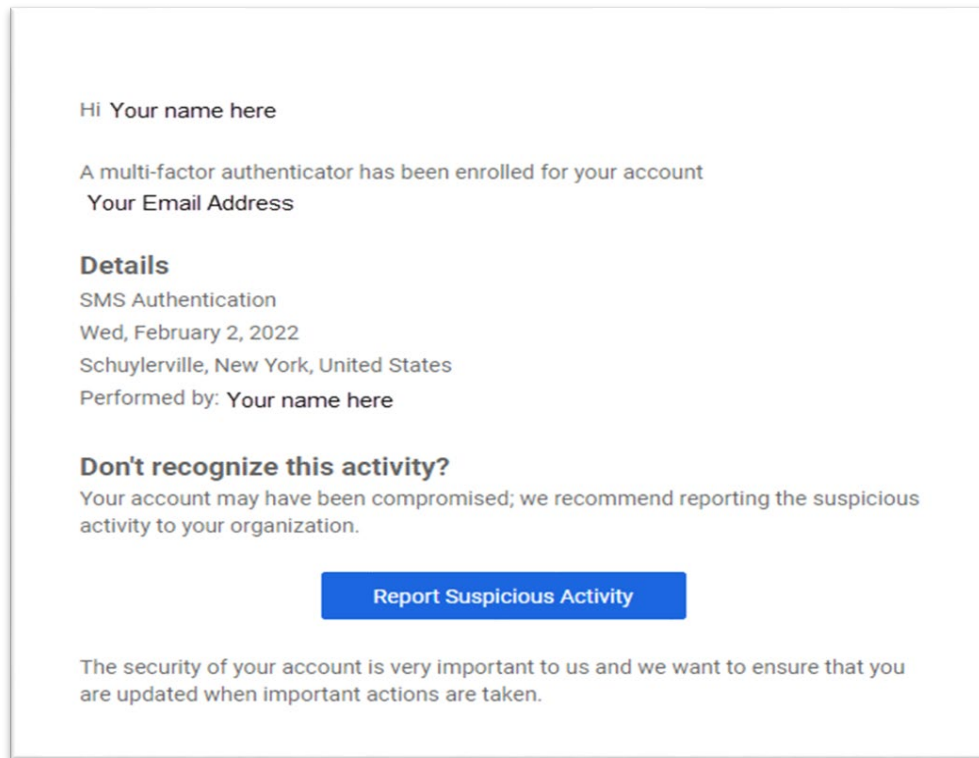


Figure 2 - Email Confirmation of MFA

An email will be sent by Okta for each Authenticator that has been set up for the eMedNYID.

NOTE: If emails are received like this, but the activity was not performed by you, report it by clicking on **Report Suspicious Activity**.

If the MFA methods that have been set up need to be changed for any reason, e.g., new phone number or new device, follow the steps listed in **Section 4.3**, below.

3.3. Create a Security Question and Image

The user now has an eMedNYID (their email address), a password, and at least one MFA method. To complete account set up, a forgotten password security question and a security image are required.

Table 11 - How to Select a Security Question and Image

Actions	Display
<ol style="list-style-type: none"> 1) Choose a security question and provide an answer that is 12 or more characters. Sentences can be used. 2) Choose a security image. As shown on the screen, the image gives the user an additional assurance that they are logging into their Okta eMedNYID account and not a fraudulent website. 3) Click Create My Account. 	

4. The eMedNY Application Dashboard

The eMedNY Application Dashboard is the main hub for accessing all eMedNY provider-related apps.

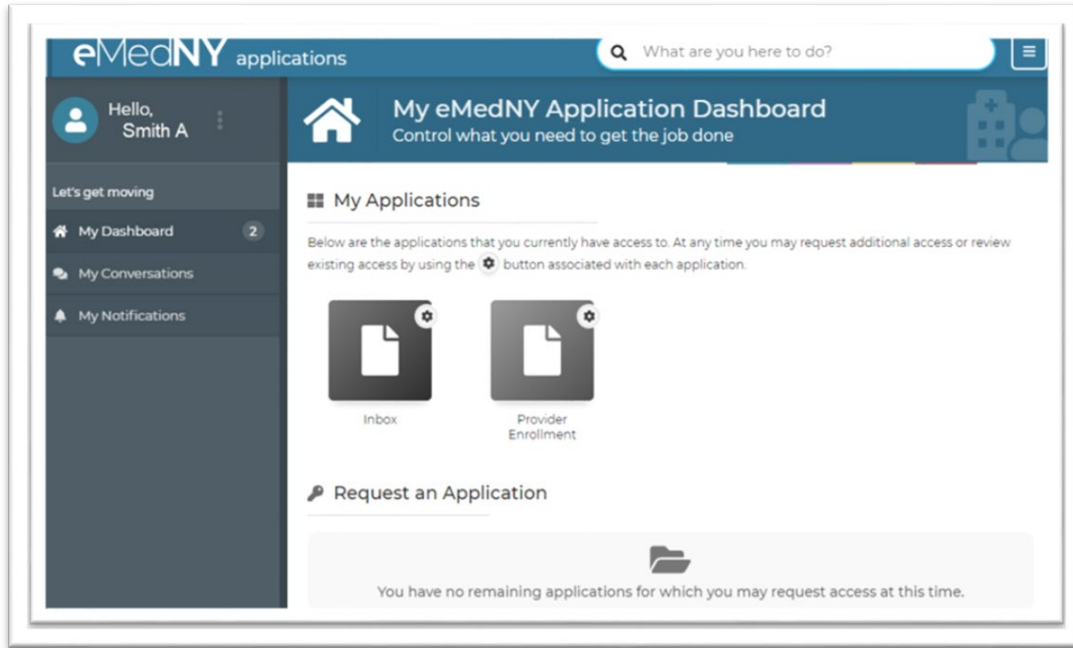


Figure 3 - eMedNY Application Dashboard

This section describes the following functions related to the eMedNY Application Dashboard:

Table 12 - Steps for Using the eMedNY Application Dashboard

Step	Action	Section
1	Log in to the IAM Portal	4.1
2	Open eMedNY applications	4.2
3	Update eMedNYID MFA Methods and Passwords	4.3


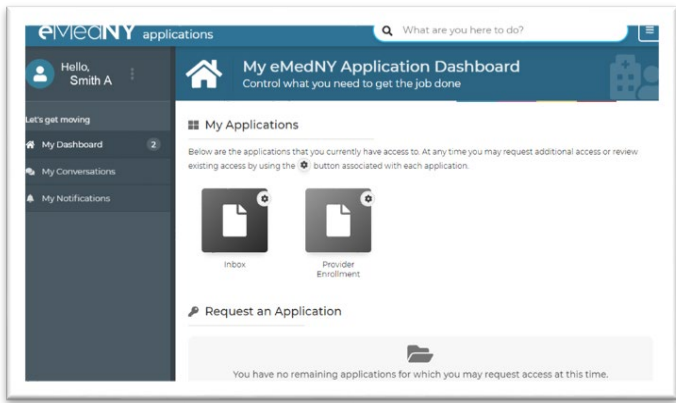


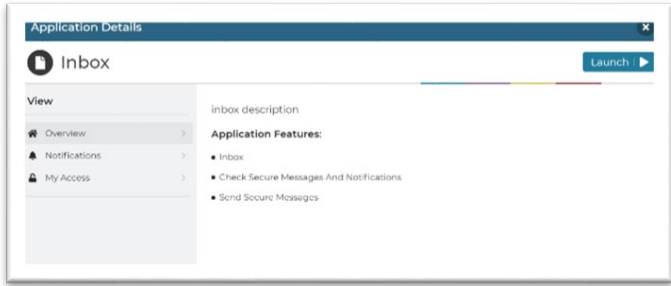
4.1. Log into the IAM Portal

If the eMedNYID has been successfully created:

1. Go to <https://iam.emedny.org>.
2. Sign in with the eMedNYID (the email address) and password.
3. Authenticate with the presented MFA method.
 - If more than one MFA method has been linked to the eMedNYID account, click the arrow next to the authenticator icon and select an alternate method.
 - The “Do not challenge me on this device for the next 15 minutes” allows users to log back in within 15 minutes from their last session and bypass the MFA challenge of step 2.

4.2. Open an eMedNY App

Table 13 - How to Open App in the IAM Portal

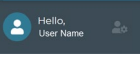
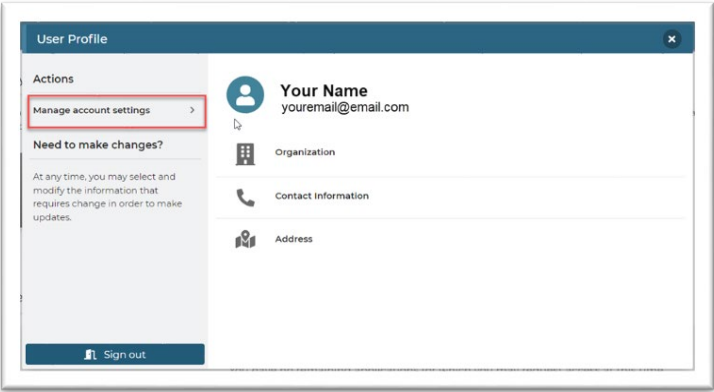
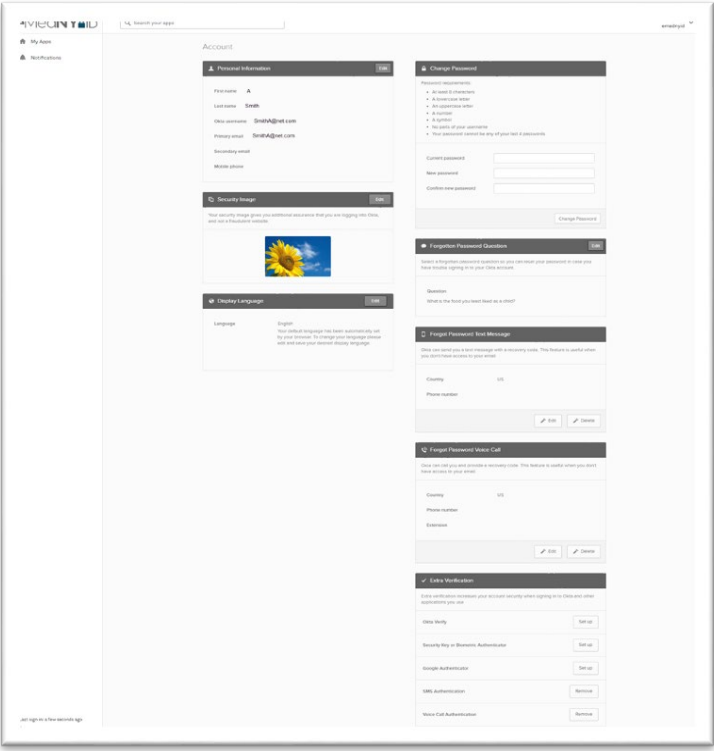
Actions	Display
<p>There are two possible steps to open an app:</p> <p>Option 1)</p> <ul style="list-style-type: none"> • Double click the app icon 	
<p>Option 2)</p> <ul style="list-style-type: none"> • Click  to view App Details. • Click  	

4.3. Update eMedNYID MFA Methods and Password

Users seeking to reset passwords and update their preferred methods for MFA must access the eMedNYID Okta account page via the IAM Portal.

Note: The eMedNYID Okta Account page does not provide the user access to eMedNY applications. The IAM Portal must be used to access eMedNY app.

Table 14 - How to Update eMedNYID Okta Account Settings

Actions	Display
<ol style="list-style-type: none"> 1) Click  in the Dashboard to display the User Profile. 2) Click Manage Account Settings. 	
<p>Note: This page is <i>not</i> the eMedNY Application Dashboard. To access apps, return to the eMedNY Application Dashboard screen.</p> <ol style="list-style-type: none"> 3) From the eMedNYID Okta account page edit the following: <ul style="list-style-type: none"> • Personal information <ul style="list-style-type: none"> ○ Secondary email ○ Mobile phone • Forgot Password Text Message • Forgot Password Voice Call <p>This page may also be used to update</p> <ul style="list-style-type: none"> • The user's password (Change Password) • MFA Methods linked to the eMedNYID account (Extra Verification) <ul style="list-style-type: none"> ○ At least one MFA Verification option must be set up. If there is only one, Okta will prevent that method from being removed from the profile. 	

5. Troubleshooting Log-In Issues

This section contains common issues that maybe be encountered by users when logging in with the eMedNYID.

Table 15 - Steps for Troubleshooting Log-In Issues

Step	Action	Section
1	Resetting a Password	5.1

5.1. Resetting a Password

When a user forgets their password and/or username, or they get locked out if too many attempts were tried on the password, the steps below allow the user to reset the password.

Table 16 - How to Reset a Forgotten Password

Actions	Display
<ol style="list-style-type: none"> 1) Click Need Help Signing in? 2) Click Forgot Password 	
<ol style="list-style-type: none"> 3) Enter the eMedNYID account (the user's email address) 4) Choose one of the three reset options: <ul style="list-style-type: none"> • Reset via SMS (text message) • Reset via Voice Call • Reset via Email <p>Important note: SMS and Voice Call reset methods <i>only</i> work if the user has been to the eMedNYID Okta account page via the Portal and set up <i>Forgot Password Text Message</i> and <i>Forgot Password Voice Call</i> entries. To set these up see Section 4.3, above.</p> 	