Application Portal User Manual

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Introduction

The DHCS Application Portal uses Microsoft Office 365 / Azure Active Directory (AAD) for providing access to DHCS Applications. This document describes the steps for internal DHCS staff and external users to access DHCS applications that are integrated with the DHCS Application Portal.

Users login to the DHCS Application Portal using their Microsoft Office 365 (AAD) account credentials or accept an invitation from the DHCS Directory Administrator.

More information provided in the "Logging In" section below.

Also, when first logging into the DHCS Application Portal or when accessing a DHCS Application, users are prompted to set up additional security verification, also referred to as Multi-Factor Authentication (MFA). MFA is an additional security step that helps protect your account by making it harder for other people to break in.

More information provided in the "Multi-Factor Authentication (MFA) Setup" section below.

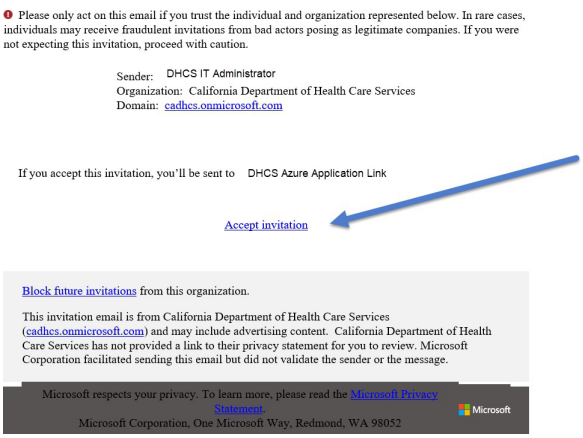
Invitation Email

When an external member (non-DHCS staff) is given permission to access a DHCS application, the member receives an invitation email with an “Accept Invitation” link to select and “Get Started” link to initiate the login process.

For some applications, the application administrator may choose to send a custom email that will look different from the one below. In these cases, it is recommended that members follow the steps in the “Logging In” section below.

When a new external member is added to a Security Group, the member receives an invitation email with at “Accept Invitation” link that appears as follows. The member selects the “Accept Invitation” link to initiate the log process.

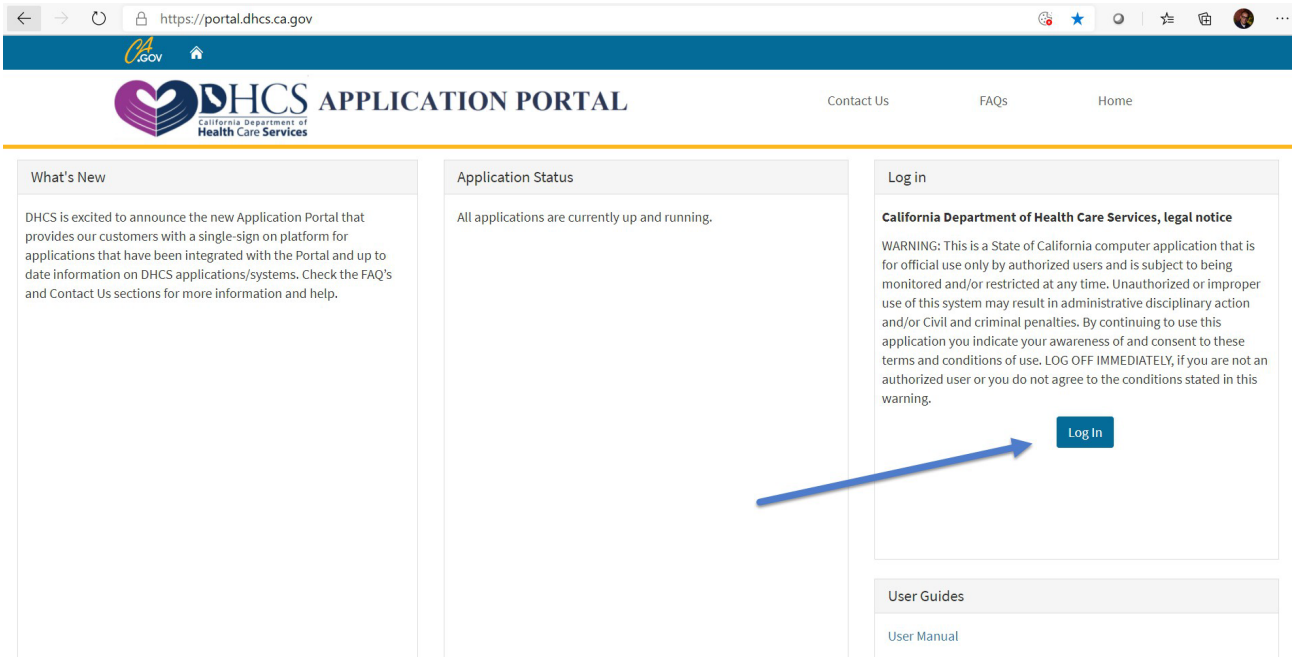
From: **Microsoft Invitations on behalf of California Department of Health Care Services** <invites@microsoft.com>



Logging in DHCS Application portal

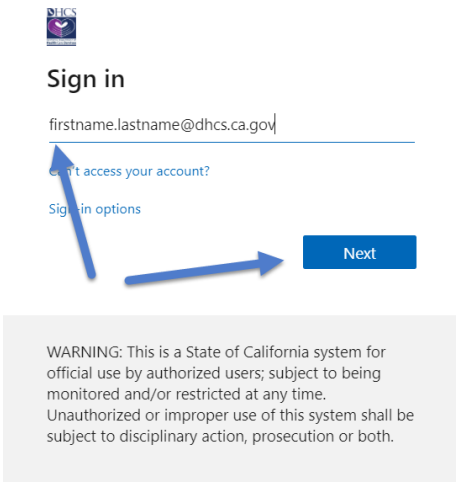
Steps

1. From the DHCS Application Portal, select Log In

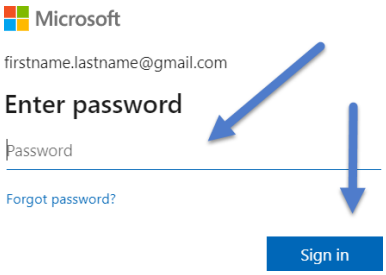


The log in screens may look different based on the browser used and the organizational configuration. Please see the following examples. Your experiences may vary.

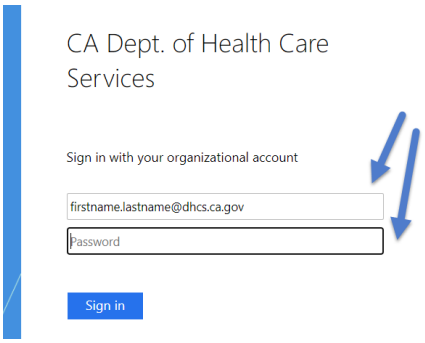
2. Enter work email address, select Next



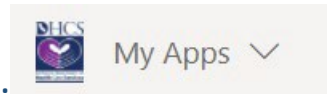
Enter password



Then…

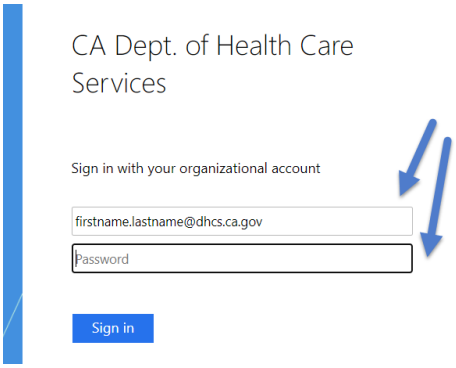


Then…

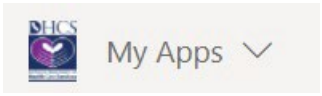


3. Pick an account or Use another account

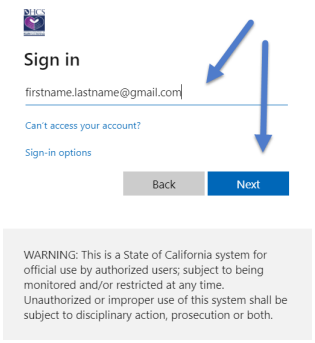
If dhcs.ca.gov or known…



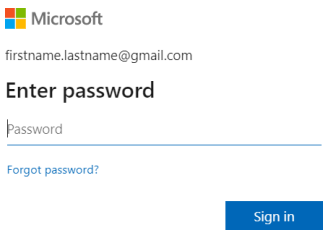
Then…



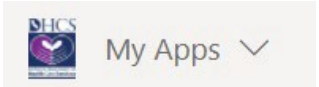
If Using another account unknown to Microsoft…



Then…



Then…

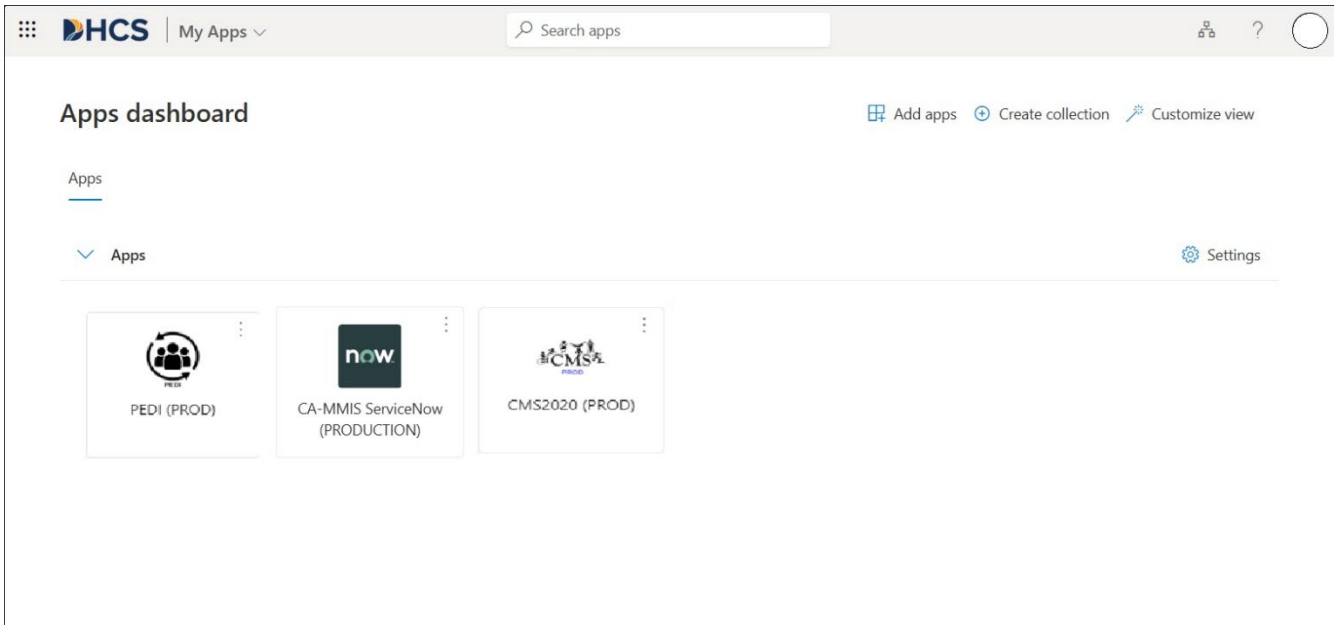


4. If logging in for the first time, you may be prompted to set up Additional Security Verification, commonly known as Multi-Factor Authentication (MFA).

   More information provided in the "Multi-Factor Authentication (MFA) Setup" section below.

   If MFA setup was previously completed, you may be prompted to authenticate using the method chosen. Follow the onscreen instructions to complete the MFA verification.

5. Once successfully logged in, the DHCS Application Gallery (My Apps page) is displayed. The My Apps page displays all the DHCS applications you have access to. Only applications that have been integrated with the DHCS Application Portal are displayed.



Access an Application

1. On the My Apps page, click on an application you want to access. The application opens in a new tab in the browser.

2. If accessing the application for the first time, you may be prompted to set up Multi-Factor Authentication.

   More information provided in the "Multi-Factor Authentication (MFA) Setup" section below.

   If a user has previously completed the MFA setup, you may be prompted to authenticate using the method chosen. Follow onscreen instructions to complete the MFA verification.

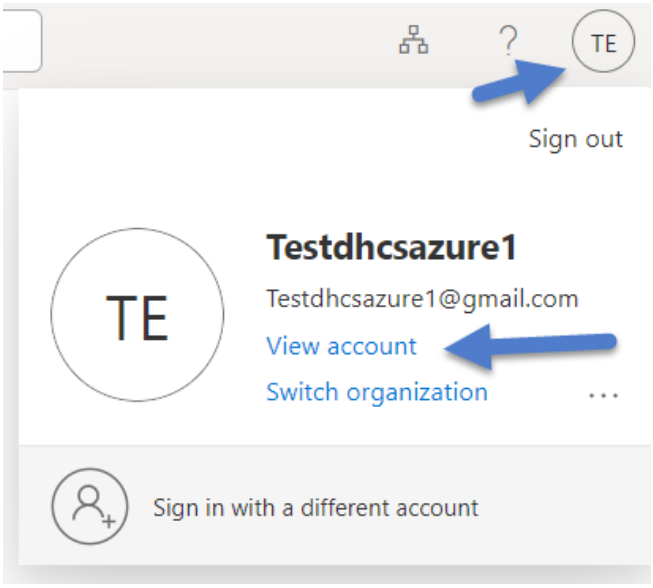
Multi-Factor Authentication (MFA) Setup

Background

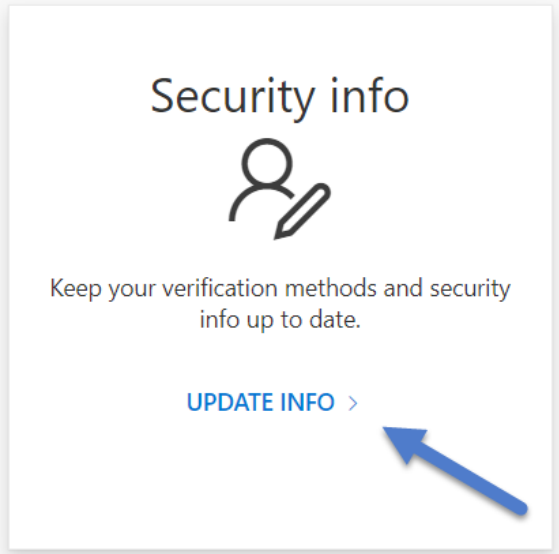
When first logging into the DHCS Application Portal, members are prompted to set up additional security verification also referred to as Multi-Factor Authentication (MFA). MFA is an additional security step that helps protect your account by making it harder for others to break in. The following steps describe how to set up and update MFA settings.

Steps

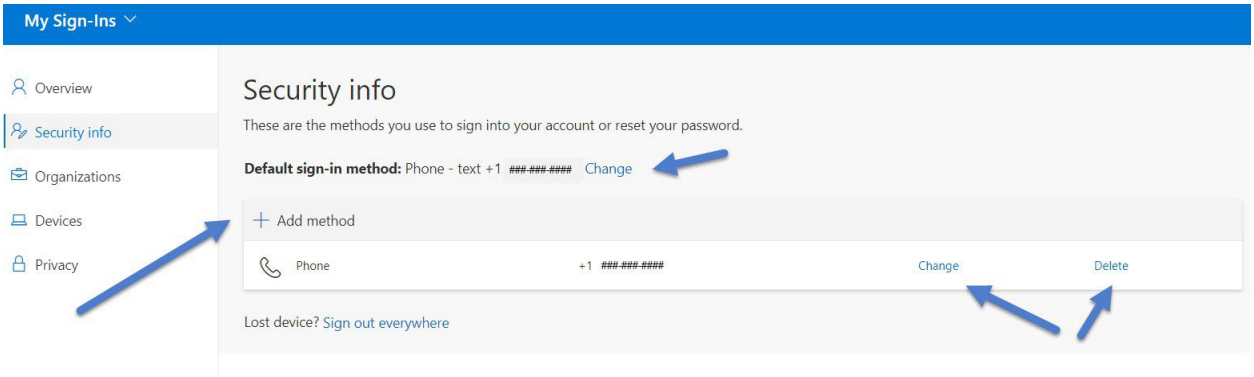
1. Select your Account Manager icon and choose View account:



2. Select UPDATE INFO >

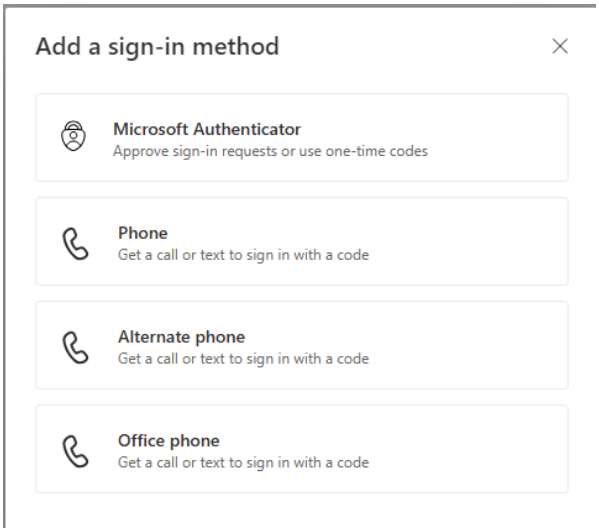


3. From the Security info page, add, change or delete a method. In this example, a Default sign-in method of Phone-text is set. Select + Add method



Note: DHCS staff cannot update the office phone through these steps. Office phone information must be updated through the Global Address List (GAL) profile update process.

4. From Add a method, select the drop-down list and a method. Follow the onscreen navigation to complete the setup.



For more detailed information and screen prints, please refer to

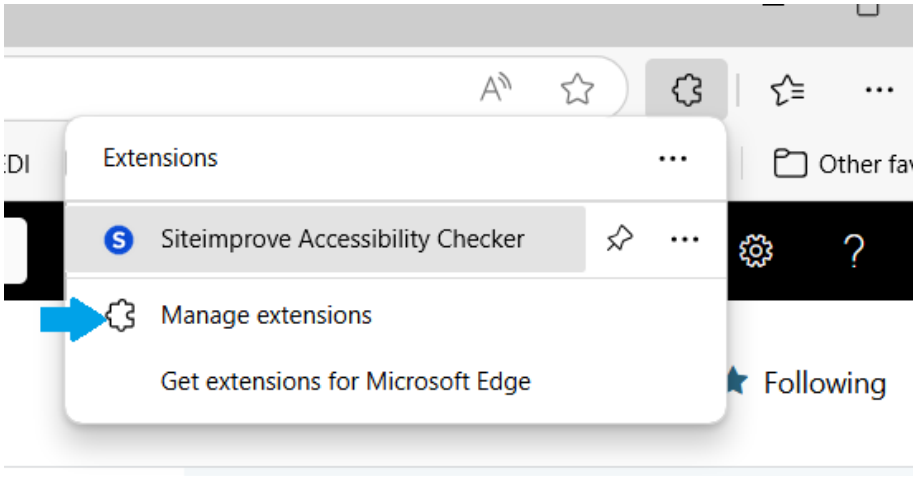
[Microsoft Multi-Factor Authentication end user first time web article]

Contact method	Description
Mobile app	• **Receive notifications for verification.** This option pushes a notification to the authenticator app on your smartphone or tablet. View the notification and, if it is legitimate, select **Authenticate** in the app. Your work or school may require that you enter a PIN before you authenticate. • **Use verification code.** In this mode, the app generates a verification code that updates every 30 seconds. Enter the most current verification code in the sign-in screen. The Microsoft Authenticator app is available for Android and iOS.
Authentication phone	• **Phone call** places an automated voice call to the phone number you provide. Answer the call and press the pound key (#) on the phone keypad to authenticate. • **Text message** ends a text message containing a verification code. Following the prompt in the text, either reply to the text message or enter the verification code provided into the sign-in interface.
Office phone	Places an automated voice call to the phone number you provide. Answer the call and press the pound key (#) on the phone keypad to authenticate.

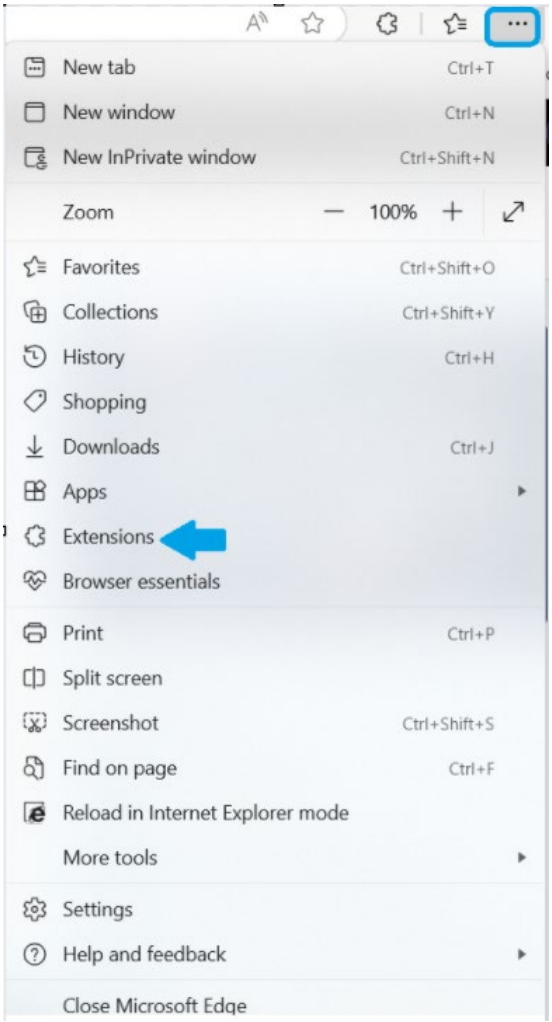
DHCS uses Microsoft Multi-Factor Authenticator application to receive an approved sign-in request. Check with your organization to decide whether Microsoft Authenticator application is the best option for you.

Also, Edge and Chrome browsers do have extensions to add a third-party multi-factor authenticator application to the browser themselves that do not require the application to be installed on your own mobile device.

Edge and Chrome browser extension are located by clicking the puzzle icon

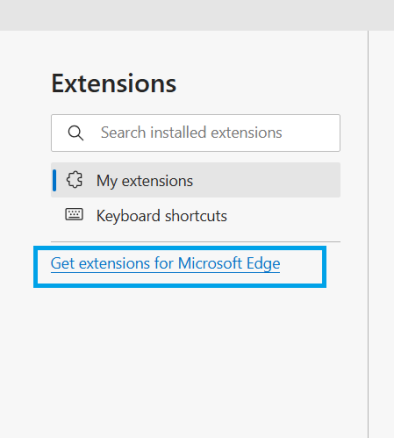


Or by clicking the three dots to select the settings and more drop down.

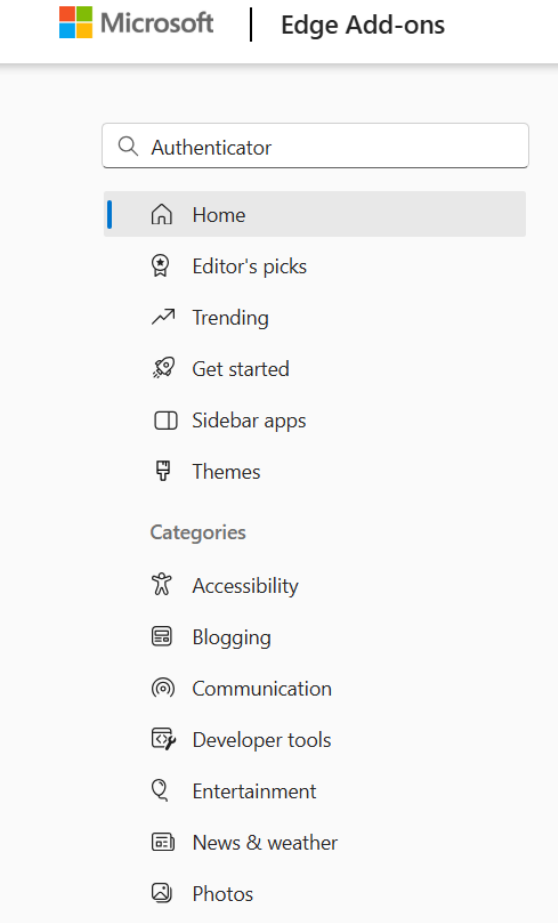


Select “Extensions” and you will be brought to manage extensions page choose “Get extensions for Microsoft Edge”, you will be redirected to the Microsoft Edge Add-ons page. Within the search field type “Authenticator” to search for third-party authenticator apps.

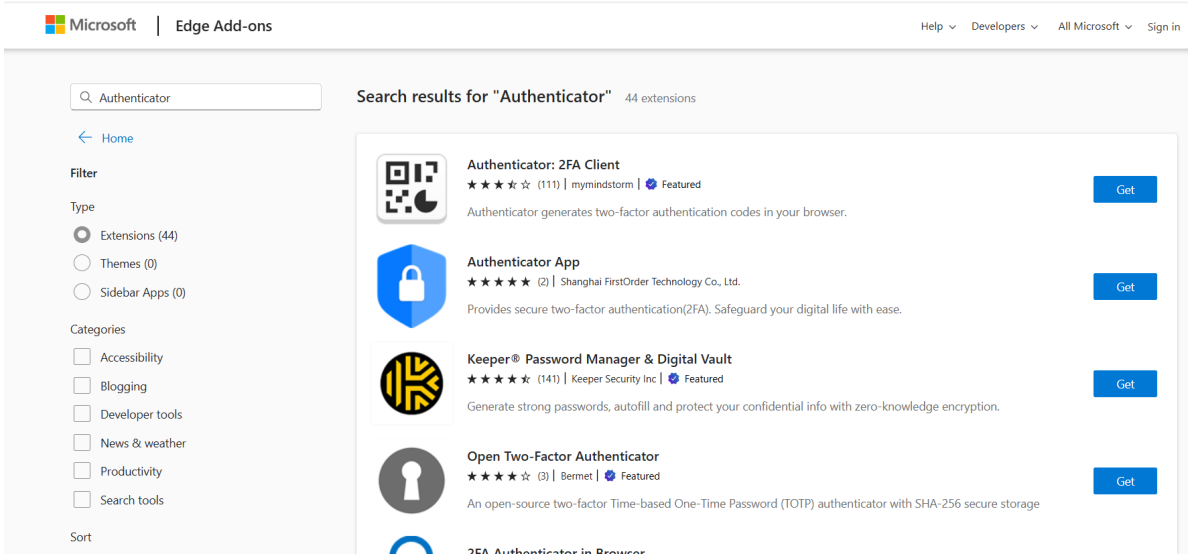
Mange Extensions page



Microsoft Edge Add-ons page

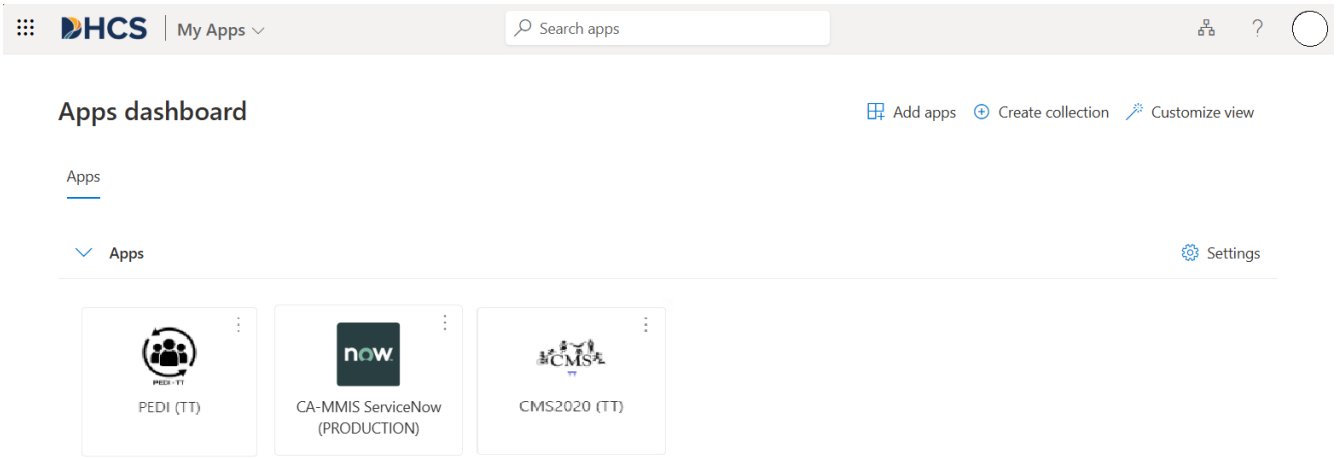


Third party authenticator application results page



Navigating to PEDI application

Once logged into the DHCS Application portal the user will land on My Apps-Apps Dashboard. From the apps dashboard the user will select the PEDI tile to open PEDI homepage. Users will notice the login page has been removed due to the user now accessing PEDI through the DHCS application portal using the multi-factor authentication single sign-on.



(Similar icons will display based on security role)

Please note to register a new organization a new link will be updated on CMS Net Provider Electronic Data Interchange page.