

# PCS-OKTA MFA Authentication User Guide for External Users

# Contents

1.	Purpose	3
2.	Background	3
3.	Multifactor authentication setup process for external users using Okta MFA	4
4.	Setting up authentication using Okta Verify	7
5.	Setting up authentication using Google Authenticator	14
6.	Setting up authentication using SMS Authentication	19
7.	Setting up authentication using Voice Call Authentication	21
8.	Log in to PCS Application using MFA	23
9.	Unable to Log in to PCS Application Using MFA	
10.	Steps to reset NY.Gov Password	
11.	Steps to manage OKTA-MFA using self-service console	33
12.	Steps to retrieve username	

#### 1. Purpose

1.1 The purpose of this user guide is to provide the steps that are required for Patient Characteristics Survey (PCS) external users to login using the OKTA Multi Factor Authentication (MFA). Okta MFA is a security technology that allows multiple methods of authentication. To enhance security, users need to choose at least two methods of verifying their identity when they sign in. However, we recommend that you set up more than two methods if possible.

NOTE: SMS Authentication and Voice Call Authentication have the easiest set-up processes.

- Okta Verify is a mobile app that will send you a push notification when you log in.
- **Google Authenticator** is a mobile app that will send you a single-use code when you log in.
- **SMS Authentication**, is a single-use code sent to your mobile phone via text when you log in.
- **Voice Call Authentication**, code is given to you via a voice call to your phone number when you log in.

## 2. Background

2.1 The Security Manager of each facility, creates the user's ID and password in the Security Management System (SMS). This ID is referred to as the user's NY.GOV ID or PCS login. Once the user ID is created, the system will automatically send out two email notifications to the user from ams-donotreply email. The first email includes the user's NYGOV ID and a URL to the application, and a second email includes a password. Refer to <u>Section 10</u> of this user guide if you are unable to login to the PCS application.

#### 3. Multifactor authentication setup process for external users using Okta MFA

3.1 The user goes to the PCS homepage <u>Patient Characteristics Survey (ny.gov</u>) and clicks on the PCS application link. Google Chrome is recommended for the best experience.



3.2 User is navigated to "Sign-in Selection" page



3.3 User clicks on "External/Local Provider (Non-State Employees) Sign-in with NY.gov account" button to authenticate.

3.4 The user is directed to the NY.GOV ID login page, where they enter their username (NY.GOV ID) and password. These are the same as their PCS username and password, which the Security Manager set up in SMS.

	IY.GOV ID
Secure Access	s to New York State Services
Username	
L2222PK1	
Password	
	Sign In
	Sign In
Forgot Userna	Sign In ne? or Forgot Password?
Forgot Usernar Create an Acco	ne? or Forgot Password?
	ne? or <u>Forgot Password?</u> unt
<u>Create an Acco</u> Need help? <u>Ge</u> This site is prot	ne? or <u>Forgot Password?</u> unt

- 3.5 User clicks on the **Sign In** button. If the password does not work, please refer to <u>section 9</u>.
- 3.6 User will be directed to NY.GOV to setup secret questions. Refer to <u>step 3.1</u> after setting up secret questions.
- 3.7 Setup multifactor authentication page is displayed. The following authentication options are available for users to select:

**NOTE**: Users should setup at least two authentication options. SMS Authentication and Voice Call Authentication methods are recommended.

- 3.7.1 **Okta Verify** is a mobile app that will send you a push notification when you log in.
- 3.7.2 **Google Authenticator** is a mobile app that will send you a single-use code when you log in.

- 3.7.3 **SMS Authentication**, is a single-use code sent to your mobile phone via text when you log in.
- 3.7.4 **Voice Call Authentication**, code is given to you via a voice call to your phone number when you log in.



- 4. Setting up authentication using Okta Verify
- 4.1.1 Click on **Setup** under Okta Verify on the multifactor authentication screen.

4.1.2 Download and install Okta Verify application on your mobile device.

***	<b>★★</b> 36K	
Seamless authentication and device security	Protect your accounts with two-factor authentication	Passwordless access to your organization's apps
	***	941
	ekta Werty + W Work account and and and define ratio 901 813	ATKD
akta	ocorp.okta.com	Did You Just Try to Sign In?
20072330078	309 703	Peter San Francisco, CA Maio win
How it works When you access your organization's apps, use Okta Venity to confirm your identity.	C CHUB Magnetical and 200 901 (Married Chub (Married Chub (Marrid Chub (Married Chub (Mar	<ul> <li>June ress</li> </ul>
Net	901813 309-703 200801	Ves, It's me

4.2 Open the Okta Verify application on the mobile device and click on the **Add Account** option.



4.3 Add account screen is displayed. Select the **Organization** option and click on Skip.



4.4 Open the Okta Verify app and click on the + sign on the top right corner to scan the QR code on your mobile device.



4.5 Click on the Yes, Ready to scan option.



4.6 Scan the QR code generated on the web page using your mobile device.

4.7 The user will be directed to **Allow Push Notifications** screen on the mobile device. To receive notifications, select the **Allow** option.

**NOTE:** If the option Skip is selected, the user will need to open the Okta Verify app every time to approve or deny request during authentications.



4.8 Click on Setup button under Okta Verify.

	NY.GOV ID
Se	t up multifactor authentication
Ve	our company requires multifactor
	ntication to add an additional layer of
	rity when signing in to your account
0	Okta Verify
9	Use a push notification sent to the
	mobile app.
	Setup

4.9 Select your device type (iPhone or Android).



4.10 User clicks on **Next** once device type is selected

	Setup Okta Verify
Select	your device type
<ul> <li>iPł</li> </ul>	none
() An	droid
Ø	Download Okta Verify from the App Store onto your mobile device.
	STATE ON OF OT THE OT OF OTO STATE
•	Next

4.11 When the user finishes the setup process, they will go back to the multifactor authentication page. There, they will see Okta Verify as one of their Enrolled factors.



4.12 From the set up multifactor authentication page, the user can setup another type of authentication.

# 5. Setting up authentication using Google Authenticator

5.1 User selects Setup option under Google Authenticator

	MY.GOV ID	
54	at up multifactor authentication	50
35054	can configure any additional optimal factor or click finish	
Enroite	ed factors	*
0	Okta Verify	-
Additio	onal optional factors	
	Coogle Authenticator Enter single-use code from the	
	Setup	-
	allister	
0	SMS Authentication Enter a single-use code sent to your	
	Setue	
-	Voice Call Authentication	
G	Use a phone to authenticate by following voice instructions.	1-
	Seture	
_		

5.2 User is directed to sect a device type (iPhone or Android)



5.3 Select the device type from the available options and click **Next**.

	🔒 NY.GOV ID
	-(0)
	Setup Coogle Authenticator
	your device type
<ul> <li>iPhi</li> <li>Anc</li> </ul>	
C device	Download <u>Google Authenticator from</u> the App. Store onto your mobile
	Next
Back to	factor list

5.4 Download and install "Google Authenticator" application on the user's mobile device

Utilitie	le Authenticator s ★★ 393K	Ģ
Stronger security with Google Authenticator Or sericate code to at per accord sets 2-see verticate.	Simple setup using your camera The the your account, you's team the Off code in you Share you have been any ted gary service	A unique code used to sign in Menuique Sites Verification, poil enter your presented and a code from this age
Sealaha 	Collaine)	Berkelen 

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5.5 Open the Google Authenticator application on the mobile device and select **Scan a QR code** option.

3:27	all LTE 🖭
K	
1	2
Set up	your first account
(by Google or th	e or setup key in your 2FA settings ird-party service). If you're having puble, go to g.co/2sv
Scan a QR	t code
Enter a se	tup key
Import existing	accounts?

5.6 Scan the QR code generated on the web page using the mobile device.



5.7 The mobile device will generate an OTP (one time passcode).



5.8 Enter the OTP generated by Google Authenticator app in the **Enter Code** field on the web page and click on **Verify**.

6	NY.GOV ID		/
		1	
	Coogle Authenticator		
Enterrader	fisplayed from the application		
Enter Code			

5.9 Google Authenticator is listed as the Enrolled factor in the multifactor authentication screen on the webpage.



5.10 User is directed to the Set-up authentication page to set-up another type of authentication

## 6. Setting up authentication using SMS Authentication

6.1 User needs to select Setup option under SMS Authentication



Receive a code via SMS to authenticate United States  Phone number  I Send code	MY.G	ID VO	- 1	1
United States • Phone number	SM			/
Phone number	(	/S to authentic	cate	
	Phone number			

1

6.2 User enters their phone number and selects **Send code** button.

- 6.3 User receives a code in a text message.
- 6.4 User enters the code and clicks the **Verify** button

		OV ID
R	aceive a code via SM	S to authenticate
Ur	ited States	ŀ
Pho	ne number	
+1	123-456-7890	Sent
Ent	er Code	
-	4707	
		-
	Verify	<u> </u>

6.5 SMS Authentication is listed as the Enrolled factor in the multifactor authentication screen on the webpage.



- 7. Setting up authentication using Voice Call Authentication
- 7.1 The user needs to select the **Setup** option under Voice Call Authentication



7.2 User enters their phone number and clicks Call button

<b>G</b>	NY.GOV	ID	/
		_/	
Follow pl	hone call instruc	tions to	
United States	autrenticate	1.	]
Phone number	Ex	tersion	1
<u> </u>			
	Call		

7.3 User receives the code through a phone call.

	Follow phone ca	ill instructions to inticate
~5	Phone number	Extension
	Cal	lioa
	1	rify.
1	Bol to factor list	

- 7.4 User enters the code and clicks the **Verify** button.
- 7.5 User clicks on **Finish** button.

7.6 Upon authentication, the user is directed to the PCS application homepage

Office of Mental Health Patient Characteristics Survey 2023	Home	Submission +	Supervisor +	QA Reports 👻	Help +	Logout
A Home / Welcome						
		Welcome to	PCS 2023			
Welcome to the Home Page of the 2023 Patient Characteristics Su Choose your task by selecting from the menu at the top of this page		information is collect	ed for the week of C	ctober 23 through O	ctober 29, 202	13.

## 8. Log in to PCS Application using MFA

- 8.1 The User goes to the PCS homepage <u>Patient Characteristics Survey (ny.gov)</u> clicks on the PCS application link (MS EDGE and CHROME browsers)
- 8.2 User is navigated to Sign-in Selection page
- 8.3 User clicks on External/Local Provider (Non-State Employees) Sign-in with NY.gov account button to authenticate. Users will use their NY.GOV ID and password, established in SMS by their Security Manager.
- 8.4 User is navigated to login page. User enters their username and password.
- 8.5 User clicks on the Sign In button.

8.6 User can select any authentication factor from the drop-down icon to login to the PCS application

	B NY.GOV ID
	- CO-
	Select an authentication factor
Ø	Okta Verify ( John Doe's iPhone
¢	Coogle Authenticator
0	SMS Authentication
3	Voice Call Authentication

8.7 If Okta verify is selected, user can select either **Send Push** or enter code.



8.7.1 If the user selects **Send Push** button, a notification is sent out to the user's mobile device. User selects **Yes, it's me** option on the mobile device. User is directed to PCS application homepage.



8.7.2 If user selects **Enter a Code** option. Open Okta Verify application and enter the code displayed on the dashboard. User is directed to PCS application homepage.



8.8 If Google Authenticator is selected as the authentication, open the Google Authenticator application, and enter the code displayed on the dashboard. User is directed to PCS application homepage.



8.9 If **SMS Authentication** is selected, enter the code received via text message on the mobile device. User is directed to PCS application homepage.

8.10 If **Voice Call Authentication** is selected, enter the code received via phone call on the mobile device and click **Verify**. User is directed to PCS application homepage.

(	
Voice Ca	II Authentication
(+1 XC	XX-XXX-8609)
Enter Code	
	Call
	<u>Call</u>

## 9. Unable to Log in to PCS Application Using MFA

9.1 If you are unable to log in using your credentials (i.e., the username and password) received via email, there are two ways to reset your password.

Refer to <u>section 10</u> to reset password using the self-service console.

Or

Reach out to your facility Security Manager to reset the password in the SMS application.

This username and password can be used to log in to any other OMH application that you may have access to.

If you are still unable to login, then you can reach out to healthhelp@its.ny.gov or contact the OMH helpdesk at 1-800-435-7697.

#### 10. Steps to reset NY.Gov Password

External users of applications that switched over to NY.Gov authentication can use the "forgot password self-service of NY.Gov" to reset their NY.Gov password. This feature will allow users to set their own 14 characters password.

If the user has access to another application that is still authenticated with ClearTrust, they can continue to use their existing ClearTrust password. No changes are made to the existing passwords. As always, the password can also be reset by the Security Manager. If the password is reset by the Security Manager, the user will receive an email with the new password.

10.1 If you need to reset your password, forgotten your NY.gov password or your password is expired, go to the URL for an application (Ex. https://pcs.omh.ny.gov/) and click on **"External/Local Provider (Non-State Employees) Sign-in with NY/gov account"** button to authenticate. The following page will display. Right click on the "Forgot Password?" and click on open link in a new tab.

	NY.GOV ID
Secure Acc	ess to New York State Services
Username	
Password	
	Sign In
	Sign In
Forgot User	Sign In mame? or Forgot Password?
	mame? or Forgot Password?
<u>Create an A</u>	mame? or Forgot Password?
<u>Create an A</u> Need help?	mame? or Forgot Password?

10.2 You will be taken to a page below where you will enter your username.

	FORGOT PASSWORD SELF SERVICE
To reset your pas	ssword, please enter valid user name and click on the Continue button.
	NY.GOV ID  Secure Access to New York State Services  'indicates required field Username* Username
	Continue This site is protected by reCAPTCHA and the Google <u>Privacy Policy</u> and <u>Terms of</u> <u>Service</u> apply.

- 10.3 Enter your NY.GOV username and then click "Continue."
- 10.4 Click the "**I'm not a robot**" box.
- 10.5 Next, you will have two options to "**Reset by answering shared secret questions**" or "**Reset using email**."

Select one reset option O Reset by answering share t secret	t questions	O Reset using eMail
Selecting shared secret option will a questions correctly.	allow you to set a new passw	ord after answering your shared secret
Selecting email option will allow you enter three new shared secrets and		During this process you will be asked to

- 10.6 If you choose to reset using your secret questions, you will answer a series of questions that you previously answered. After that, you will have a "**Continue**" button that lets you set up a new password.
- 10.7 If you choose to reset by email, you will receive an email with a link to reset your security questions.

This email was sent in response to your "Forgot Password" request. If you DID NOT make the request, you may disregard this email.

By selecting forgotten password you have begun the account reactivation process. For security reasons you will be asked to complete two steps. First, establish three new shared secrets and second, create a new password. Once you have completed these steps your account will be reactivated.

Please click here to reactivate your account. Please do not close out of the browser while completing the account activation.

If the above link does not work please copy and paste the below URL into your browser.

https://my.ny.gov/FPSV4/reset.xhtml?rid=edb1f337-8955-4456-9828-aaec89ebd6eb&nygovidlang=en

NOTE: The above link is valid for only 24 hours.

10.8 You will click on the link to reactivate your account.

#### 10.9 Click on **Continue**.

NY.GOV ID				
			You will now begin	NY.gov ID ACTIVATION gn the process of reactivity of the Continue Suttain below.
NY.GOV ID	Get Assolance	About NY GOV ID	Peopley Policy	Serves of Service FAQs

#### 10.10 Answer three secret questions.

		NY.gov ID Activation
Vimost donel		
bu are now ready to	re-activate your NX gov kt.	
During this process, y Set 3 valid secret o Set a new passwo	puestions and answers.	
		Secret Questions
	Testington respond Not	
	"Question 1	
	Select Orie	•
	'Answer	
	"Confirm Answer	
	"Ouestion 2	
	Select One	*
	Antioer	
	"Confirm Answer	
	'Question 3	

10.11 Once you complete the questions you will be able to create a new password.

10.12 The system displays the following page, click on **Continue**.

		You have	successfully saved you		v ID Activati en: Peor dok Continue	
NY.GOV ID	Get Annihasce	About NY IGOV ID	Privacy Policy	Terms of Service	FADs	

10.13 Create New Password and Confirm Password.

2		
NY.GOV ID		
	NY.gov ID ACTIVATION	
	Password must contain at least 1 digit, 1 alphabetic, and minimum 14 characters.	
	Television interactivel News Parameter/*	
	Confest Pageasord*	
	Continue	
NY.GOV ID Get Assistance About NY.GOV ID	Privacy Policy Tarms of Service FAQs	

10.14 Click on **Continue**.

4.						
NY.GOV ID						
				Your New J	ID ACTIVATION the best reset.	
NY.GOV ID	Get Assistance	About NYLGOV ID	Privacy Policy	Terms of Service	FAQs	

10.15 After the password change, you will be logged into NY.GOV, but please log-out, and refer to <u>section 3</u>, and complete all the steps.

2	Services	News Govern	mont	
Nt.gov ID Change Passw	ord Update My Account	Help Desk Information	About NY.gov ID	HAS
Welcome Ramankees, to the My NY Use Your IV gor ID is - LBESTRE Last login -	Management site at NY gay	>		
2.				

### 11. Steps to manage OKTA-MFA using self-service console

The external users will be able to manage their OKTA MFA mode of authentications by the following steps below.

11.1.1 If you need to set up or remove the current mode of authentication that you have setup initially then go to <a href="https://my.ny.gov/LoginV4/login.xhtml">https://my.ny.gov/LoginV4/login.xhtml</a> and enter your NY.gov ID (i.e., Username) and the password and click on **Sign In**.

NY.GOV ID
s to New York State Service
Sign In
me? or Forgot Password?
ount
et Assistance

11.2 You will be directed to the OKTA Dashboard

11.3 Under the profile, click on **Settings** 

okta	Q. Search your apps	Ramandeeptest NY State Identity Servi
<ul> <li>My Apps</li> <li>Work</li> <li>Add section (*)</li> <li>Notifications (*)</li> <li>Add apps.</li> </ul>	My Apps Work Add section	Ramandeeptest Bhullar ramandeep.bhullar2@its.n ygov Settings Preferences Recent Activity Sign out

- 11.4 System displays the account personal information as well as the extra verification section.
- 11.5 Click on the edit profile button to add or remove mode of authentication.

NOTE: User should set up at least two authe	entication options
---	--------------------

	🖌 Edit Profile
✓ Extra Verification	
Extra verification increases your account see Okta and other applications you use	curity when signing in to
Okta Verify	Enabled
Google Authenticator	Enabled
SMS Authentication	Enabled
Voice Call Authentication	Enabled

11.6 Enter your password and click on **Verify** button.

🔒 NY.GOV ID	
Please verify your password Password	
Verify	

11.7 System displays the following screen.

🔒 NY.GOV ID
Okta Verify (RKHB)
Send Push
Or enter code
Send push automatically
Back to sign in

11.8 Select an authentication factor from the drop-down list.



11.9 If Okta verify is selected, you can select either Send Push or enter code.

11.10 If you select **Send Push** button, a notification is sent out to your mobile device. You select **Yes, It's me** option on the mobile device.

	Did You Just Try to Sign In?
7	Near Albany, New York, United States More Info
ç	Windows 10
٢	Just now
Ð	https://login-qa.ny.gov

11.11 You are directed to add or remove additional mode of authentication from the extra verification section.

✓ Extra Verification	
Extra verification increases your account se Okta and other applications you use	ecurity when signing in to
Okta Verify	Remove
Google Authenticator	Remove
SMS Authentication	Remove
Voice Call Authentication	Remove

11.12 To remove a mode of authentication, you must click on the **Remove** button.

11.13 When remove button is clicked, the system displays the message below:



- 11.14 Click on Yes to remove the mode of authentication (OKTA Verify). Similarly other mode of authentication (I.e., Google Authenticator, SMS Authentication, and Voice Call Authentication) can be removed. (Note: you need to have setup at least two authentication options).
- 11.15 Once the mode of authentication is removed, you will be able to set it up again by clicking on **Set up** button and <u>refer to section 4</u>.

✓ Extra Verification	
Extra verification increases your account security w applications you use	hen signing in to Okta and other
Okta Verify	Set up
Google Authenticator	Remove
SMS Authentication	Remove
Voice Call Authentication	Remove

#### 12. Steps to retrieve username

12.1 If you forgot your username, go to the URL for an application you are trying to access and click on "External/Local Provider (Non-State Employees) Sign-in with NY.gov account" button. The following page will display. Right click on the Forgot Username and click on open link in a new tab.

Secure Access to New York State Services
Username
Password
Sign In
<u>Forgot Username?</u> c · <u>Forgot Password?</u>
Create an Account
Need help? Get Assistance
This site is protected by reCAPTCHA and the Google <u>Privacy Policy</u> and <u>Terms of Service</u> apply

12.2 Enter your first name, last name and email address and click on "Email me the Username" and your username will be emailed to you. If you have multiple NY. Gov, make sure to use the business account NY. Gov ID to login.

FORGOT USERNAME SELF SERVICE				
Please enter all the fields below and click on the 'Email me the Username' button. Any Username(s) matching the combination of First Name, Last Name and Email will be emailed to the email address provided.				
	🔒 NY.GOV ID			
	* indicates required field			
	First Name*			
	First Name			
	Last Name*			
	Last Name			
	Email*			
	Email			
	Email me the Username			
	This site is protected by reCAPTCHA and the Google <u>Privacy Policy</u> and <u>Terms of</u> <u>Service</u> apply.			

12.3 The system displays the following message if the email is successfully sent to your email address.

An email containing your Username(s) has been sent to the email address we have in our system.     Please check your junk mail filters/folders in case the email from NY.govID@its.ny.gov has been blocked.				
FORGOT USERNAME SELF SERVICE				
Please enter all the fields below and click on the 'Email me the Username' button. Any Username(s) matching the combination of First Name, Last Name and Email will be emailed to the email address provided.				
	🔒 NY.GOV ID			
	* indicates required field			
	First Name*			
	First Name			
	Last Name*			
	Last Name			
	Email*			
	Email			
	Email me the Username			
	This site is protected by reCAPTCHA and the Google $\underline{Privacy, Policy}$ and $\underline{Terms of Service}$ apply.			

12.4 The system displays the error message if the user account doesn't exist. If you see the error message below, please contact your internal IT helpdesk for support.

🛞 No Username found for the data entered below.				
FORGOT USERNAME SELF SERVICE				
Please enter all the fields below and click on the 'Email me the Username' button. Any Username(s) matching the combination of First Name, Last Name and Email will be emailed to the email address provided.				
	🔒 NY.GOV ID			
	* indicates required field			
	First Name*			
	raman			
	Last Name*			
	hundal			
	Email*			
	ram@its.ny.gov			
	Email me the Username			
	This site is protected by reCAPTCHA and the Google <u>Privacy Policy</u> and <u>Terms of</u> <u>Service</u> apply.			

12.5 To login, navigate back to application that you want to access in a new tab and enter your username received in the email.