



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..... | 27 |
| 10. Steps to reset NY.Gov Password..... | 28 |
| 11. Steps to manage OKTA-MFA using self-service console | 33 |
| 12. Steps to retrieve username | 39 |

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 [Section 10](#) 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 [Patient Characteristics Survey \(ny.gov\)](#) and clicks on the PCS application link. Google Chrome is recommended for the best experience.

Survey Resources

Preparing for the Survey

- [2023 PCS Calendar](#)  – Includes all of the important dates for 2023
- [What's New for 2023](#)  – Summarizes changes to the form and application
- Survey Training
 - [WebEx Recording](#)
 - [Presentation Slides](#) 

The Data Entry Web Application

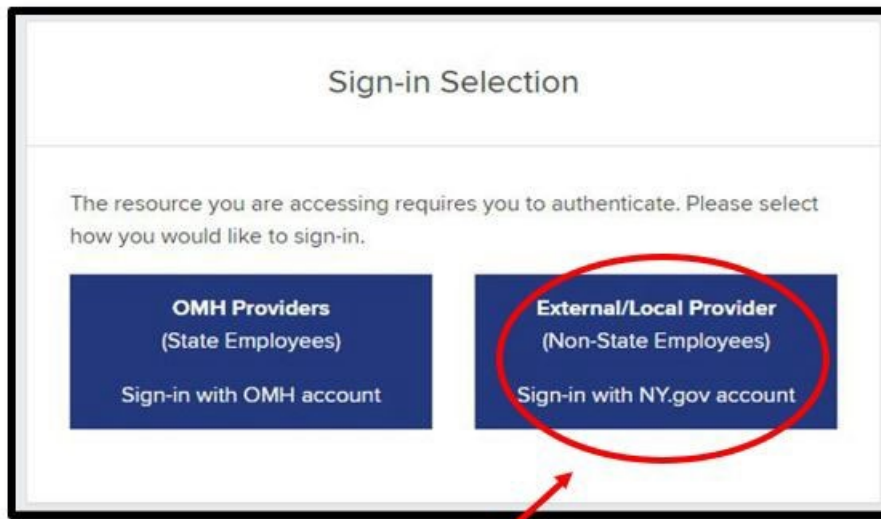
- [2023 PCS Application](#) (User Identification and Password Required)  Available: October 23 – December 6, 2023
- PCS -OKTA Multi-Factor Authentication (MFA) Guidance
 - [User Guide for Internal Users](#) 
 - [User Guide for External Users](#) 



PCS Reference Materials

- [2022 PCS User Manual](#) 
- [2023 Survey Form](#)  (for informational purposes only – not for data collection)
- [2023 PCS Guidelines](#)  – Covers general reporting instructions (PDF)
- [2023 Using the Electronic Data Upload Feature](#)  - Contains information on:
 - [File Layout](#) 
 - [Sample Upload File](#) 
 - [Validations](#) 
 - [Valid County Zip Code Combinations](#) 
 - [Valid ICD-10 DSM-5 Codes Sorted by Label](#) 
 - [Valid ICD-10 DSM-5 Codes Sorted by Codes](#) 
 - [Data Upload Notification Form](#)
- [2022 Frequently Asked Questions \(FAQS\)](#) 

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.

NY.GOV ID
Secure Access to New York State Services

Username
L2222PK1

Password
.....

Sign In

[Forgot Username?](#) or [Forgot Password?](#)

[Create an Account](#)

Need help? [Get Assistance](#)

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply

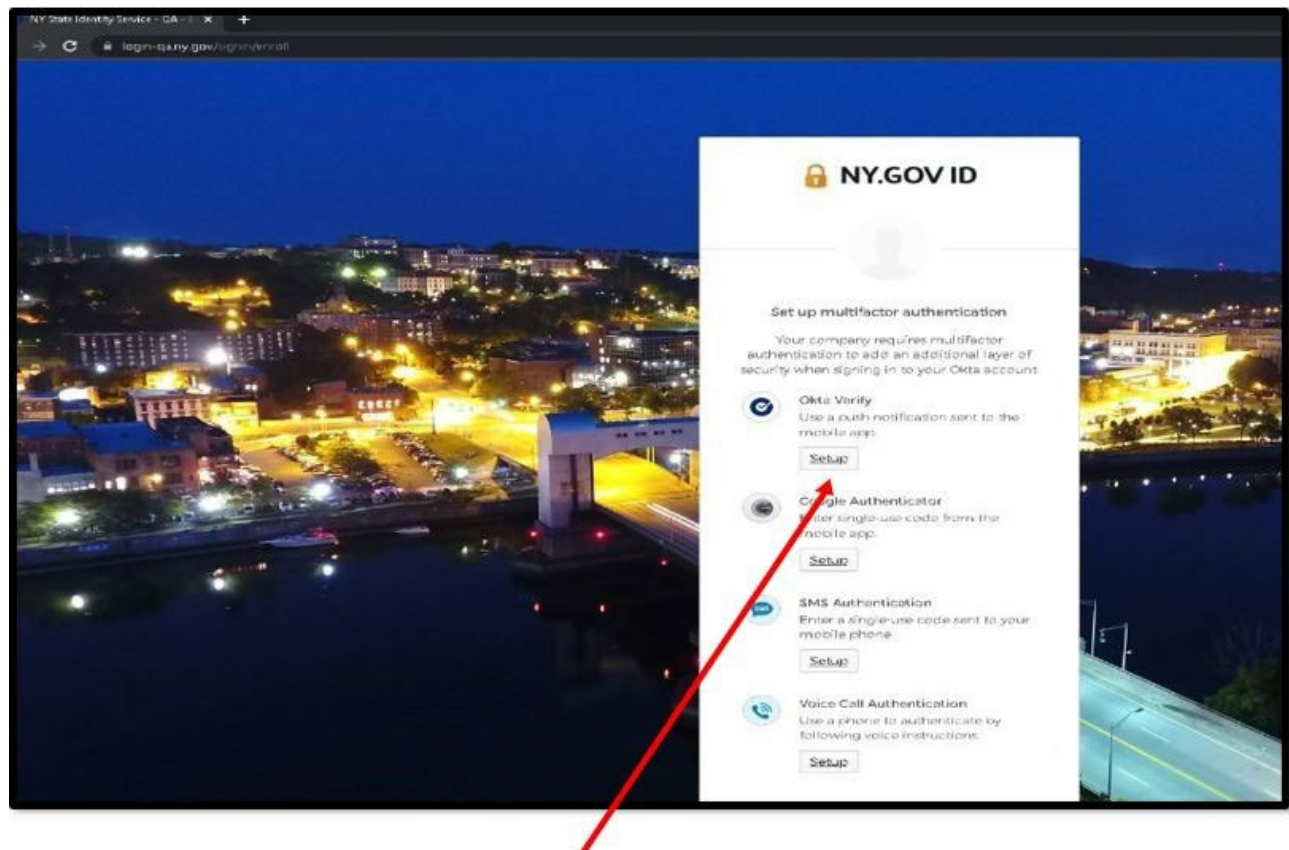
- 3.5 User clicks on the **Sign In** button. If the password does not work, please refer to [section 9](#).
- 3.6 User will be directed to NY.GOV to setup secret questions. Refer to [step 3.1](#) after setting up secret questions.
- 3.7 Setup multifactor authentication page is displayed. The following 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.

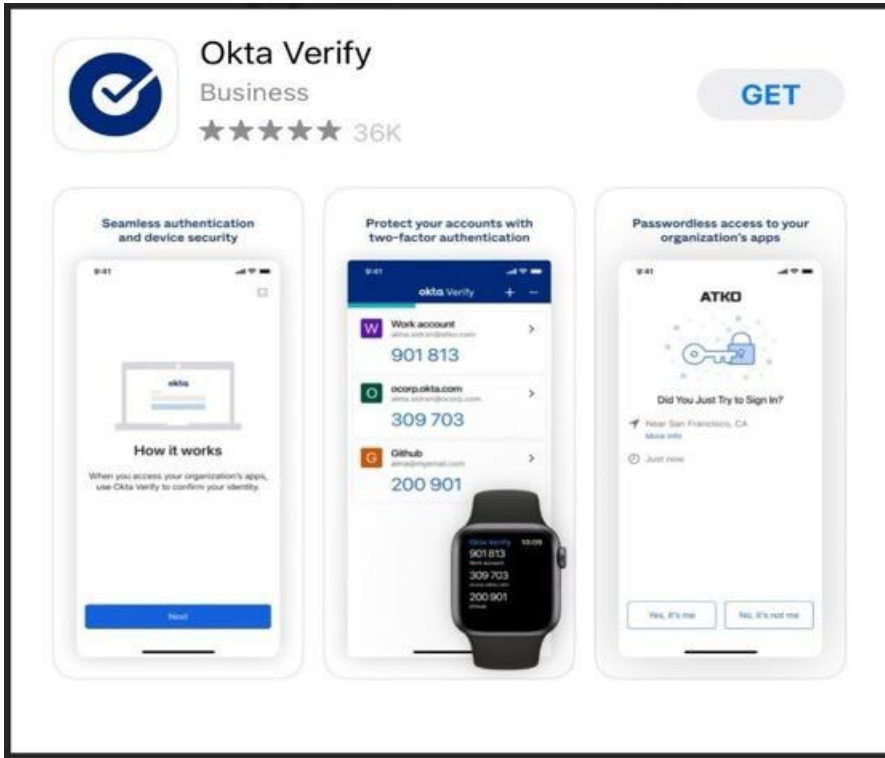
3.7.4 **Voice Call Authentication**, code is given to you via a voice call to your phone number when you log in.



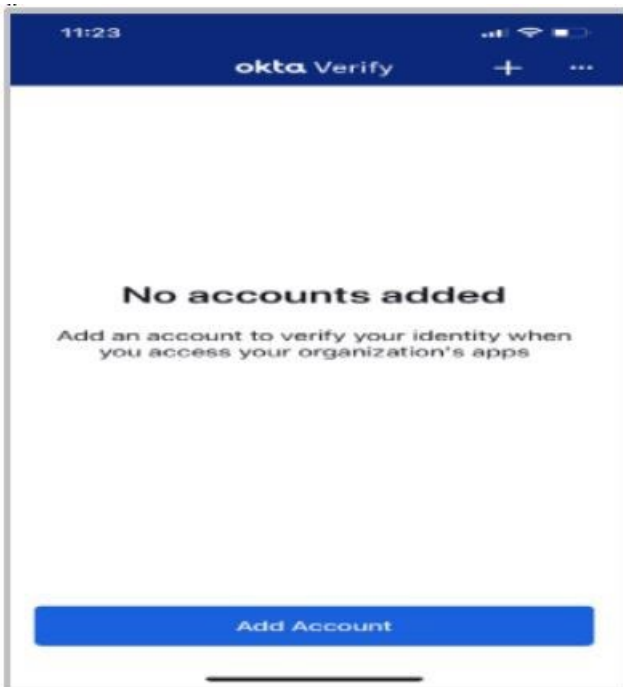
4. Setting up authentication using Okta Verify

4.1.1 Click on **Setup** under Okta Verify on the multifactor authentication screen.

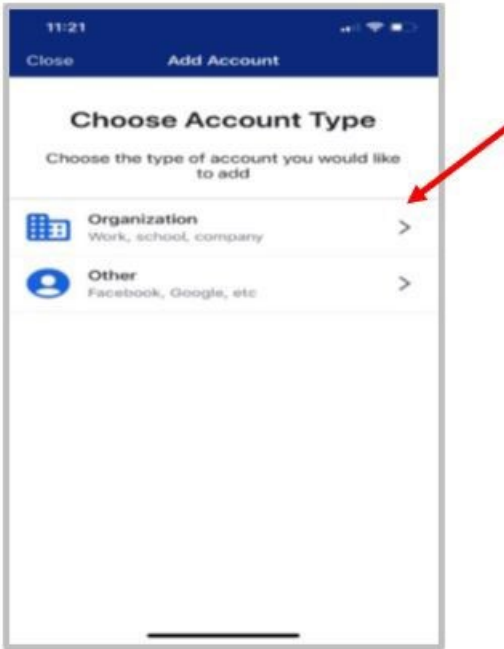
4.1.2 Download and install Okta Verify application on your mobile device.



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.

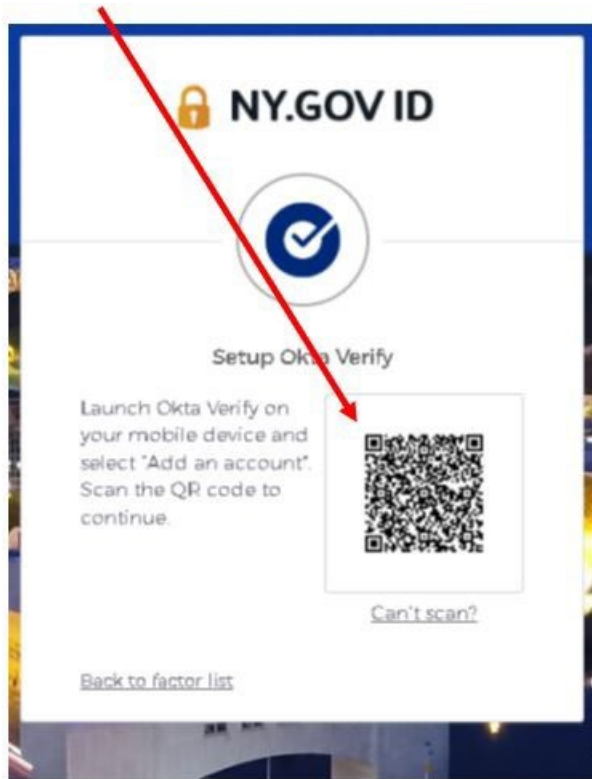


4.4 Open the Okta Verify app and click on the + sign on the top right corner to scan the QR code on your mobile device.



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.

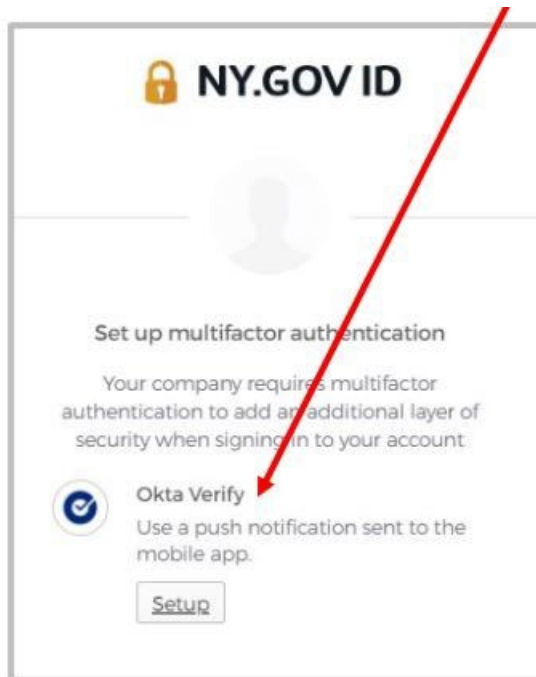


- 4.7 The user will be directed to **Allow Push Notifications** screen on the mobile device. To receive notifications, select the **Allow** option.

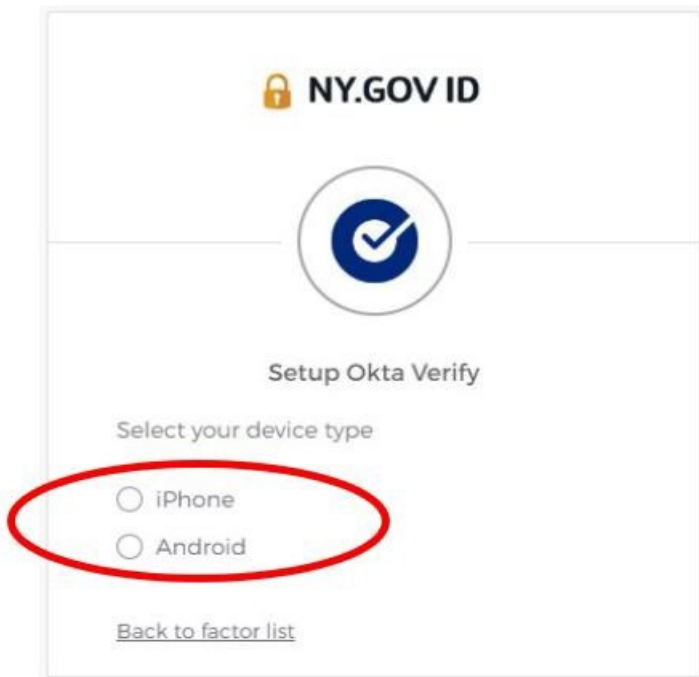
NOTE: If the option Skip is selected, the user will need to open the Okta Verify app every time to approve or deny request during authentications.



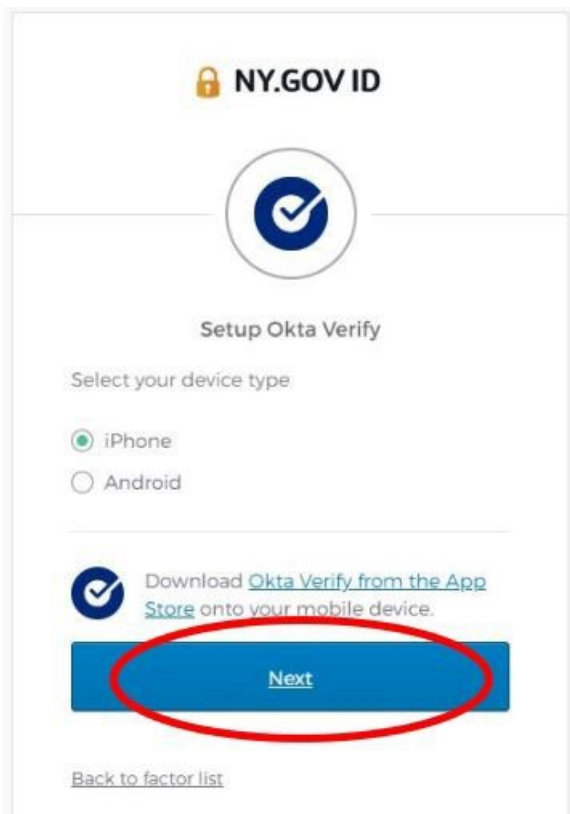
- 4.8 Click on **Setup** button under Okta Verify.



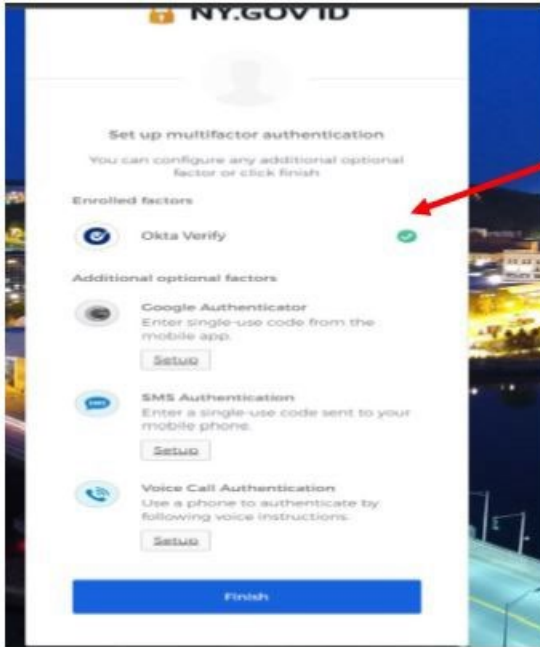
4.9 Select your device type (iPhone or Android).



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



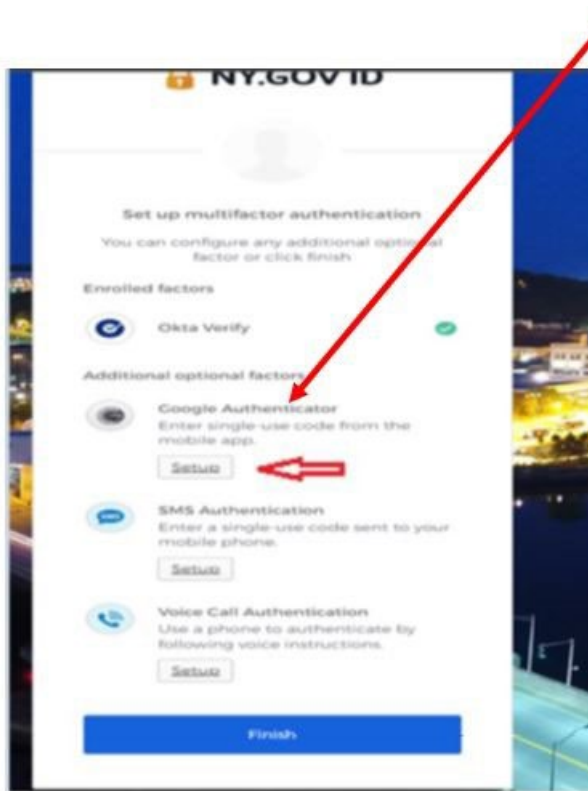
4.11 When the user finishes the setup process, they will go back to the multifactor authentication page. There, they will see Okta Verify as one of their Enrolled factors.



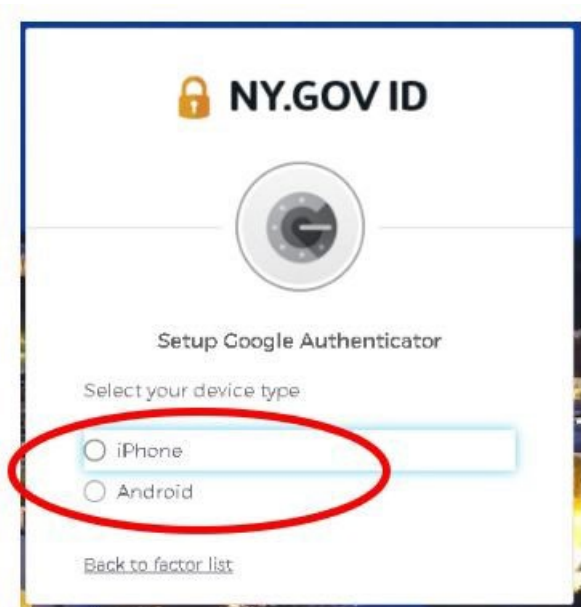
4.12 From the set up multifactor authentication page, the user can setup another type of authentication.

5. Setting up authentication using Google Authenticator

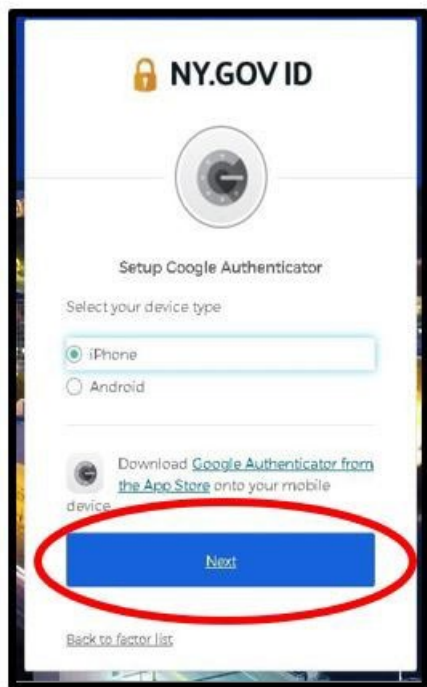
5.1 User selects **Setup** option under Google Authenticator



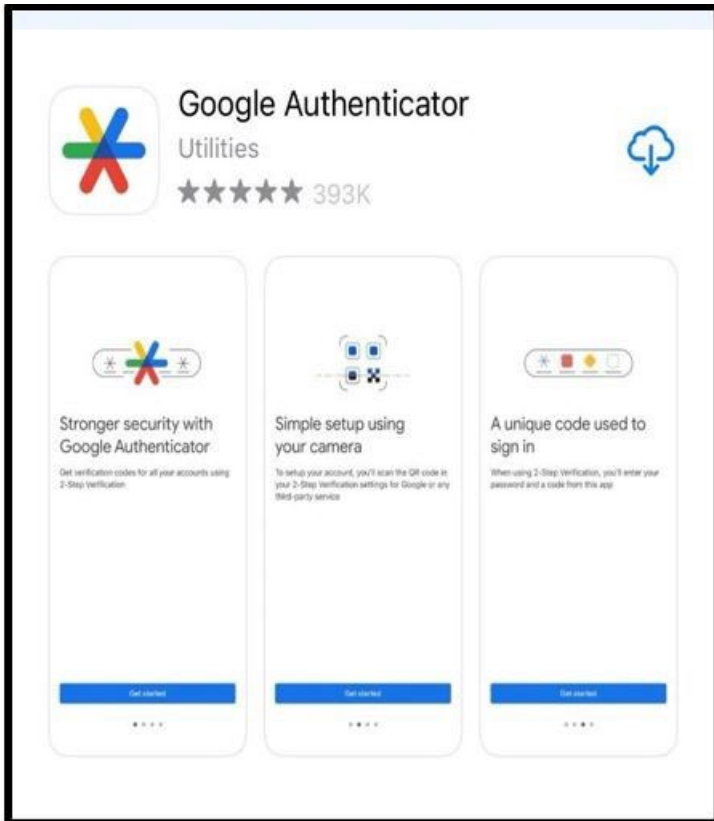
5.2 User is directed to select a device type (iPhone or Android)



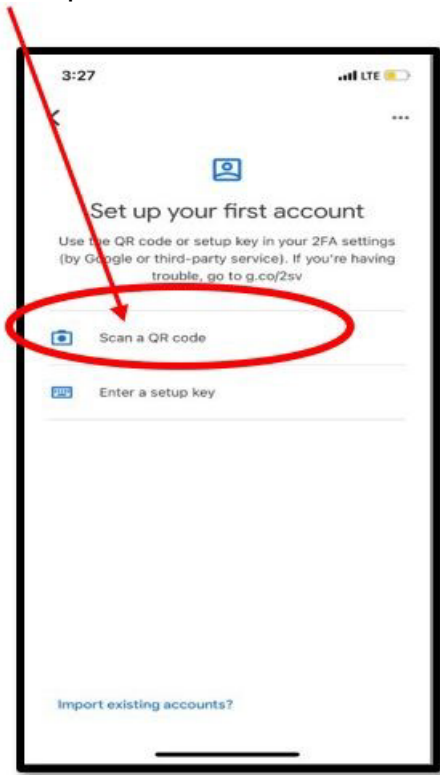
5.3 Select the device type from the available options and click **Next**.



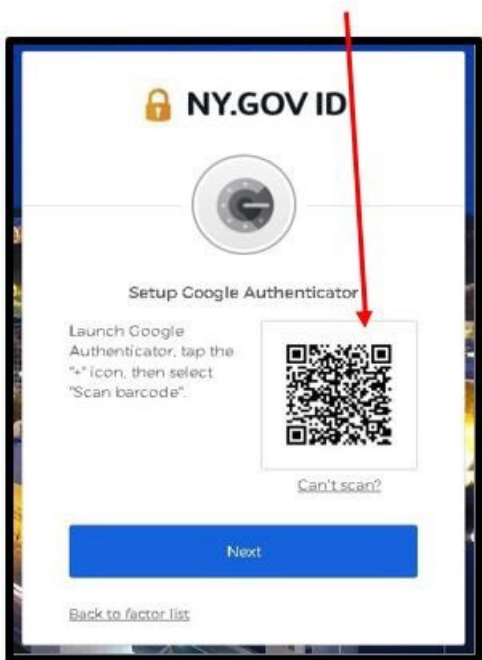
5.4 Download and install “**Google Authenticator**” application on the user’s mobile device



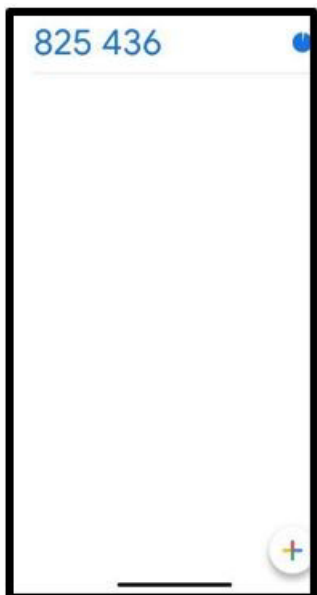
- 5.5 Open the Google Authenticator application on the mobile device and select **Scan a QR code** option.



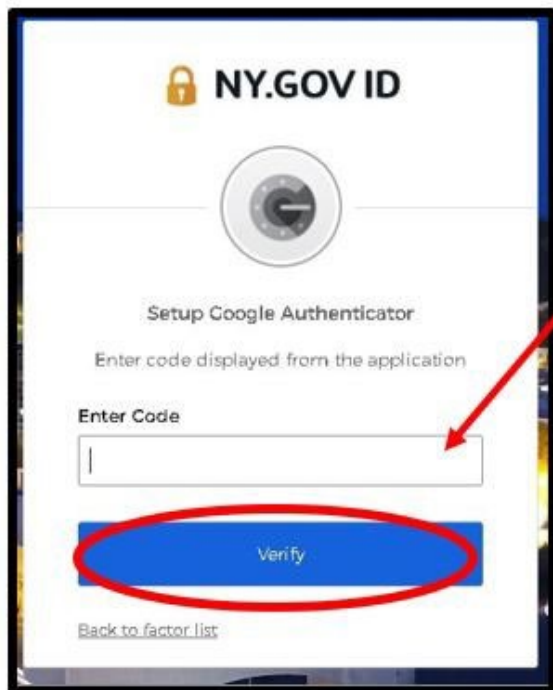
- 5.6 Scan the QR code generated on the web page using the mobile device.



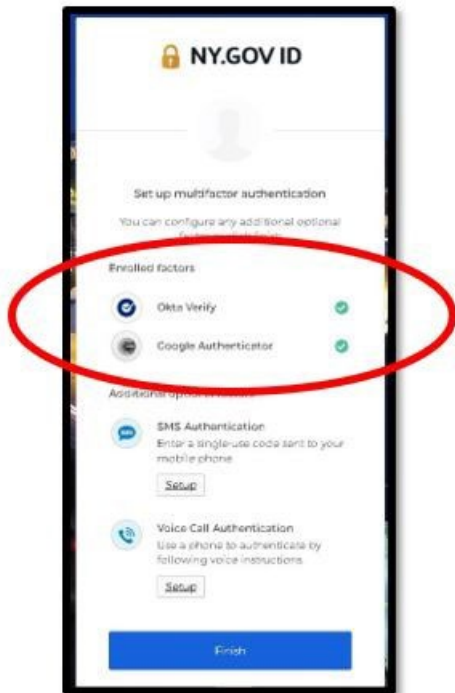
5.7 The mobile device will generate an OTP (one time passcode).



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



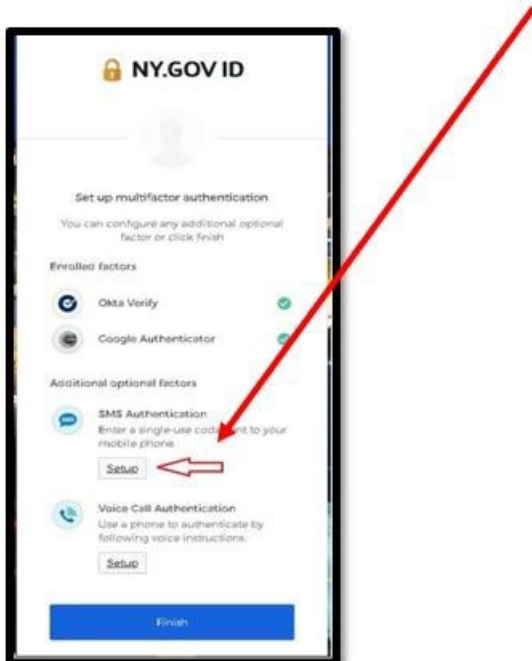
5.9 Google Authenticator is listed as the Enrolled factor in the multifactor authentication screen on the webpage.



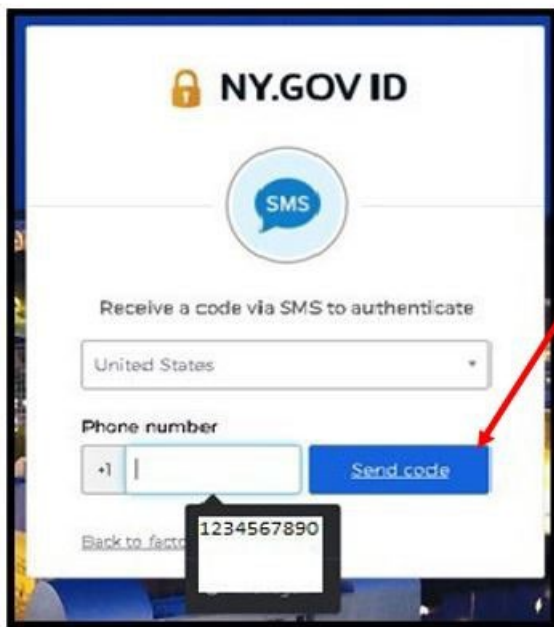
5.10 User is directed to the Set-up authentication page to set-up another type of authentication

6. Setting up authentication using SMS Authentication

6.1 User needs to select **Setup** option under SMS Authentication

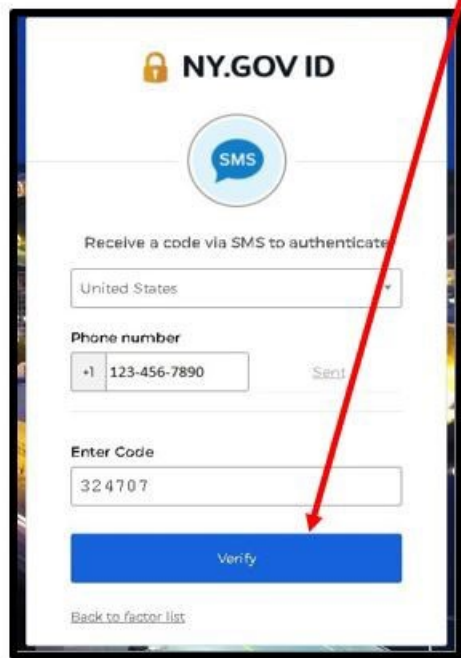


6.2 User enters their phone number and selects **Send code** button.

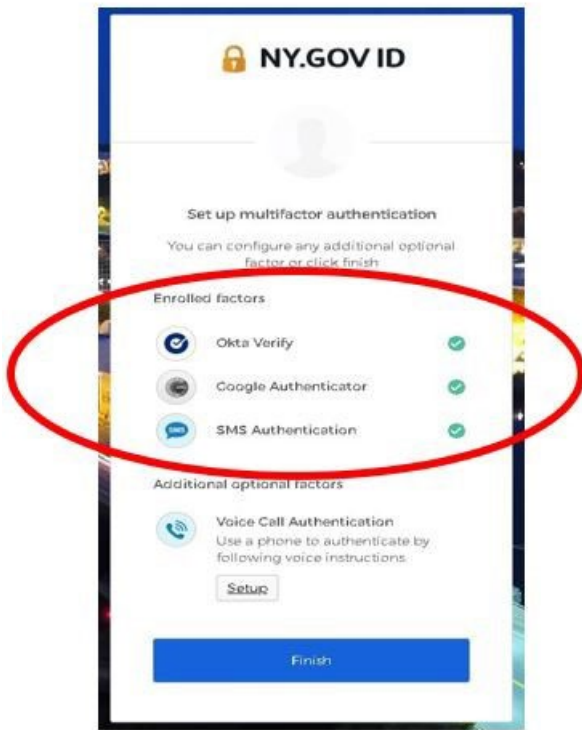


6.3 User receives a code in a text message.

6.4 User enters the code and clicks the **Verify** button

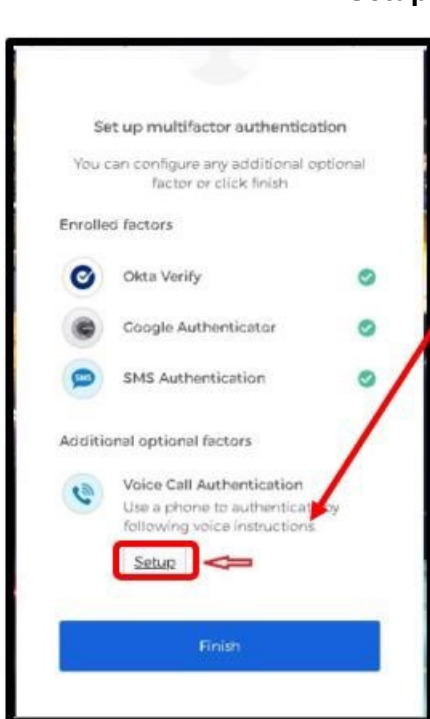


6.5 SMS Authentication is listed as the Enrolled factor in the multifactor authentication screen on the webpage.

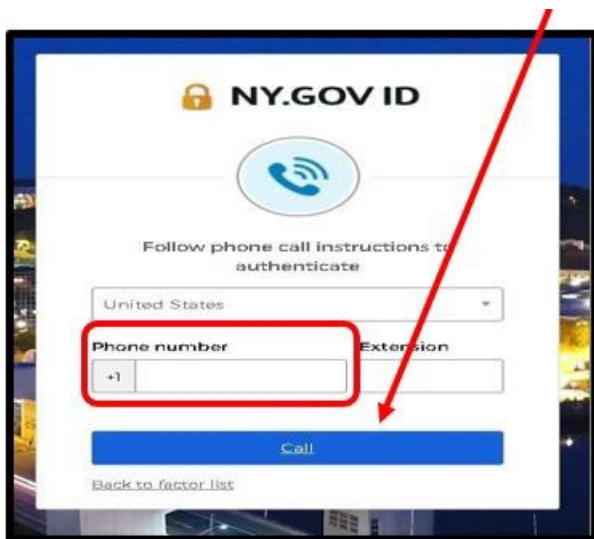


7. Setting up authentication using Voice Call Authentication

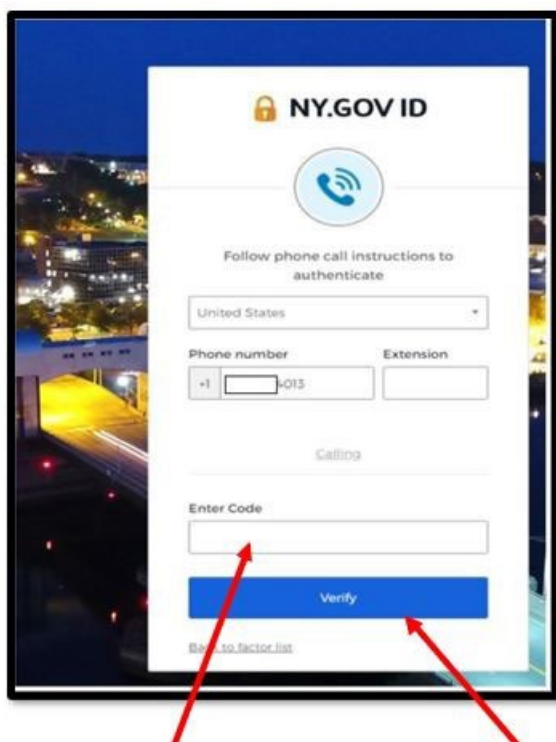
7.1 The user needs to select the **Setup** option under Voice Call Authentication



7.2 User enters their phone number and clicks **Call** button



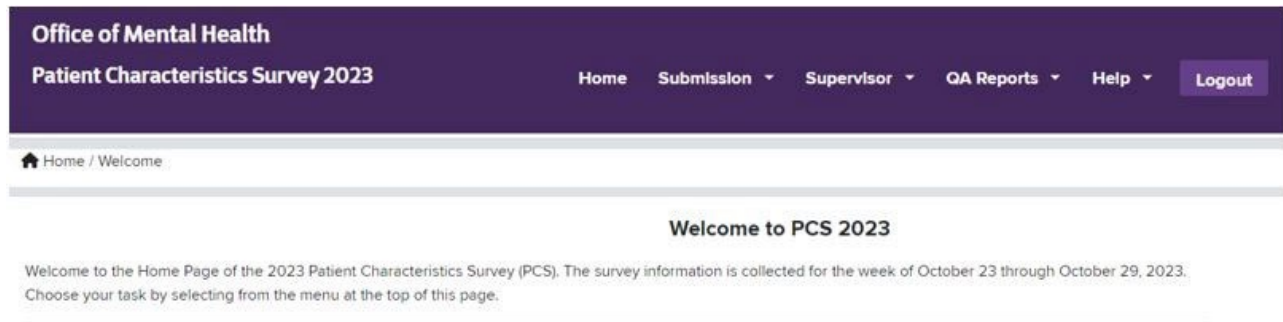
7.3 User receives the code through a phone call.



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



8. Log in to PCS Application using MFA

8.1 The User goes to the PCS homepage [Patient Characteristics Survey \(ny.gov\)](https://www.ny.gov/patient-characteristics-survey) clicks on the PCS application link (MS EDGE and CHROME browsers)

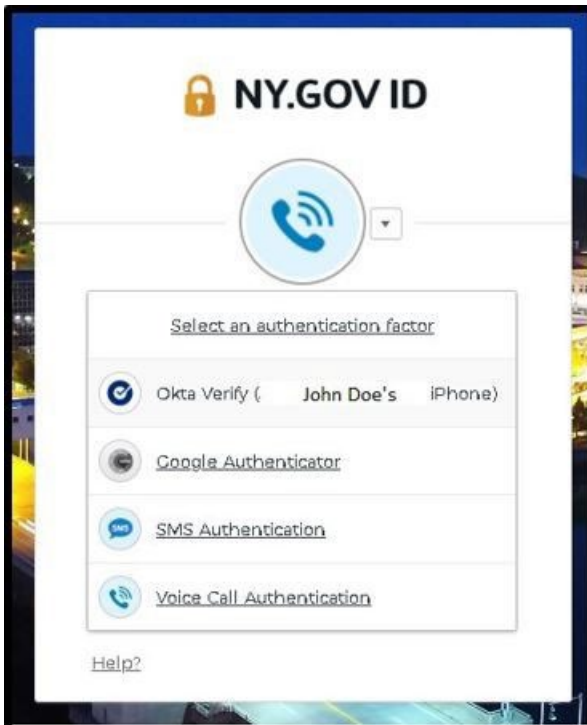
8.2 User is navigated to **Sign-in Selection** page

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.

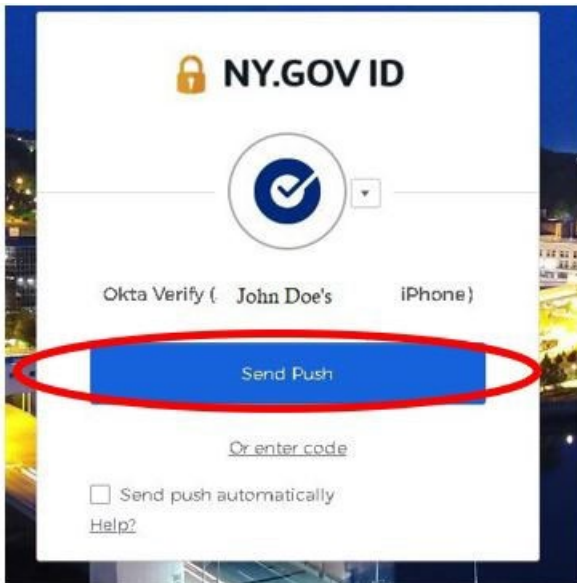
8.4 User is navigated to login page. User enters their username and password.

8.5 User clicks on the Sign In button.

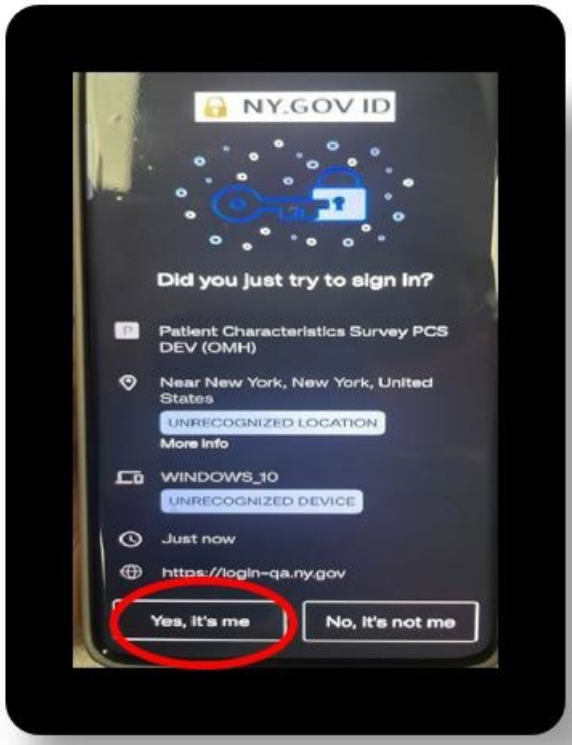
8.6 User can select any authentication factor from the drop-down icon to login to the PCS application



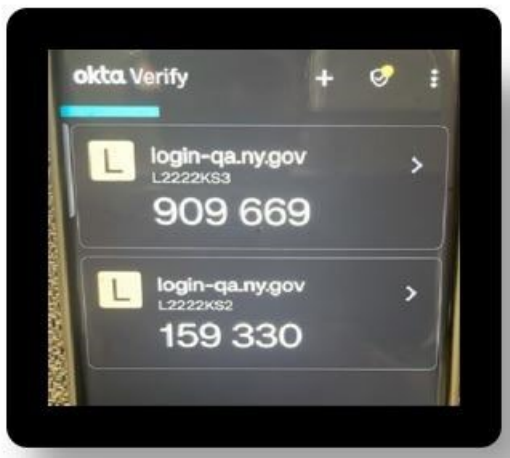
8.7 If Okta verify is selected, user can select either **Send Push** or enter code.



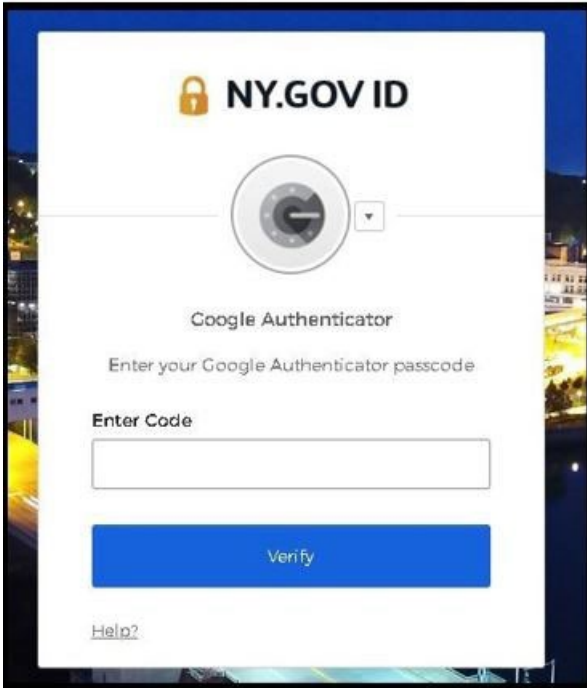
8.7.1 If the user selects **Send Push** button, a notification is sent out to the user's mobile device. User selects **Yes, it's me** option on the mobile device. User is directed to PCS application homepage.



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.

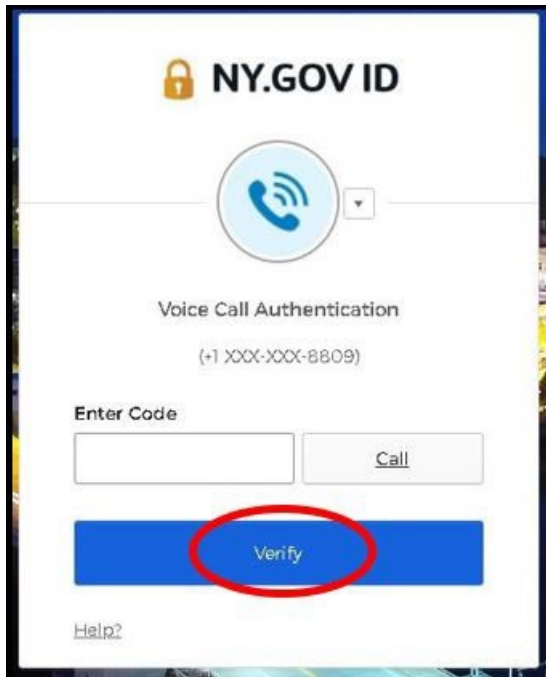


8.8 If Google Authenticator is selected as the authentication, open the Google Authenticator application, and enter the code displayed on the dashboard. User is directed to PCS application homepage.



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.



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 [section 10](#) 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 Access to New York State Services

Username

Password

Sign In

[Forgot Username?](#) or [Forgot Password?](#)

[Create an Account](#)

Need help? [Get Assistance](#)

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply

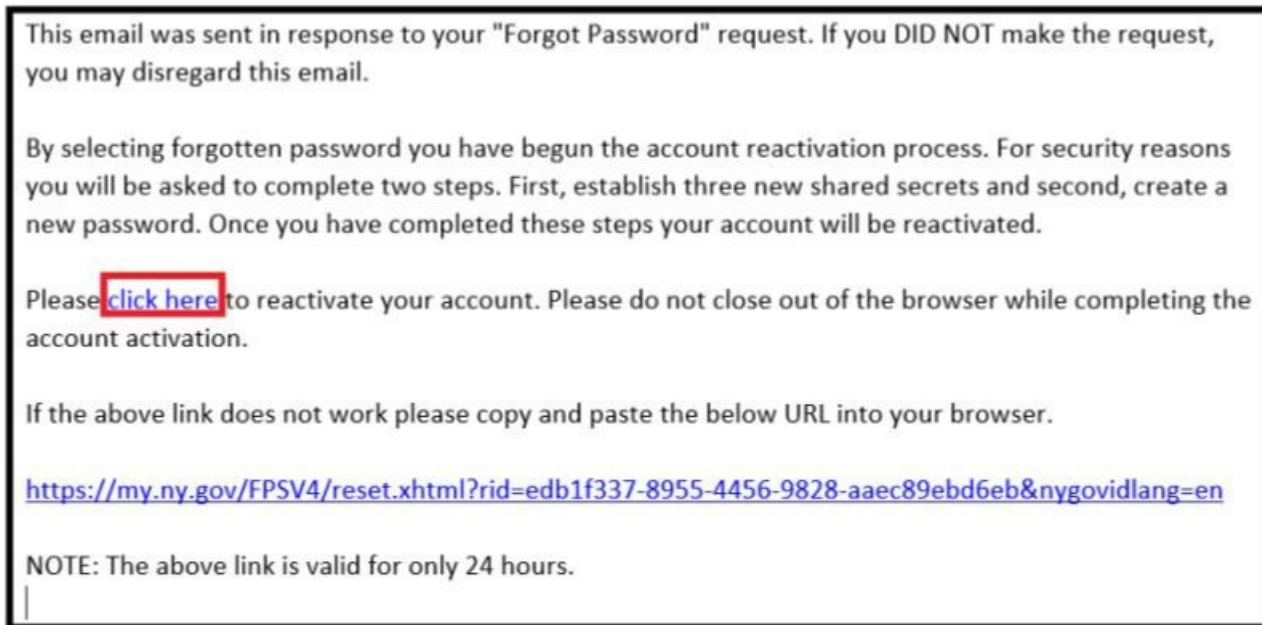
10.2 You will be taken to a page below where you will enter your username.

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.**”

- 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.



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

10.9 Click on **Continue**.



10.10 Answer three secret questions.

my.nyc.gov
NY.GOV ID

NY.gov ID Activation

Almost done!
You are now ready to re-activate your NY.gov id.

During this process, you will need to

- Set 3 valid secret questions and answers.
- Set a new password.

Secret Questions

*Indicates required field

*Question 1
Select One

Answer

*Confirm Answer

*Question 2
Select One

Answer

*Confirm Answer

*Question 3
Select One

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**.

my.nyc.gov
NY.GOV ID

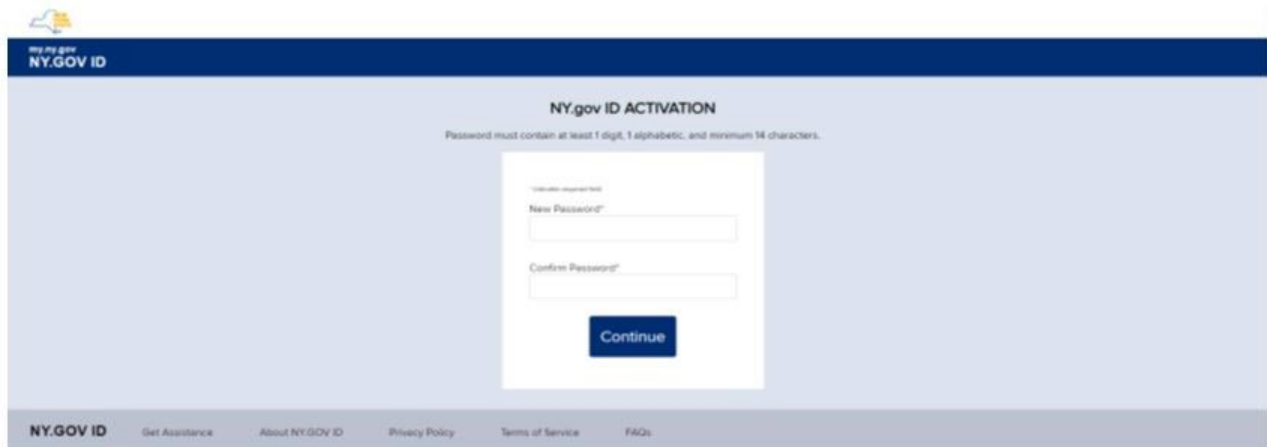
NY.gov ID Activation

You have successfully saved your secret questions and answers. Please click the below Continue button to set your new password.

Continue

NY.GOV ID | Get Assistance | About NY.GOV ID | Privacy Policy | Terms of Service | FAQs

10.13 Create New Password and Confirm Password.



10.14 Click on **Continue**.



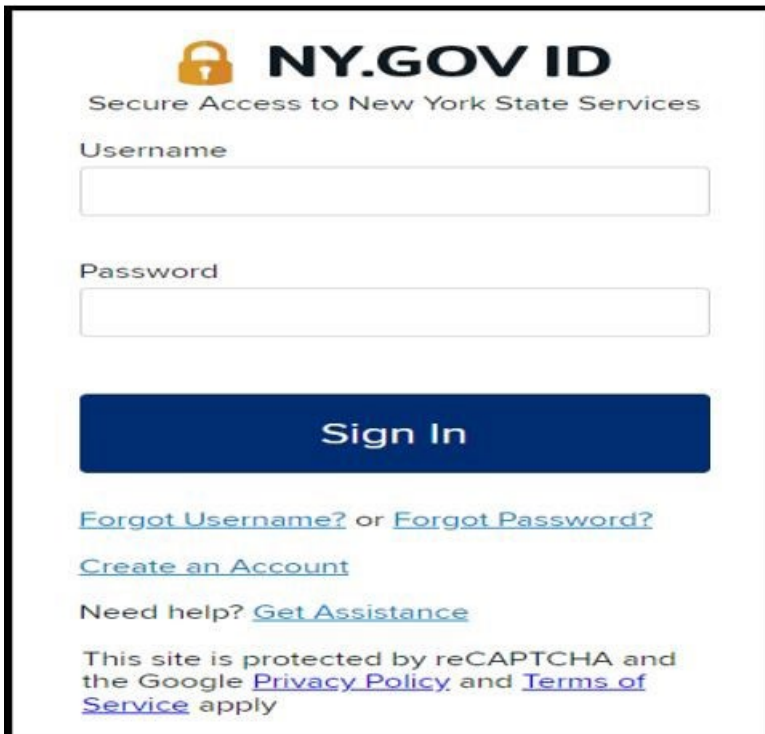
10.15 After the password change, you will be logged into NY.GOV, but please log-out, and refer to [section 3](#), and complete all the steps.



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.

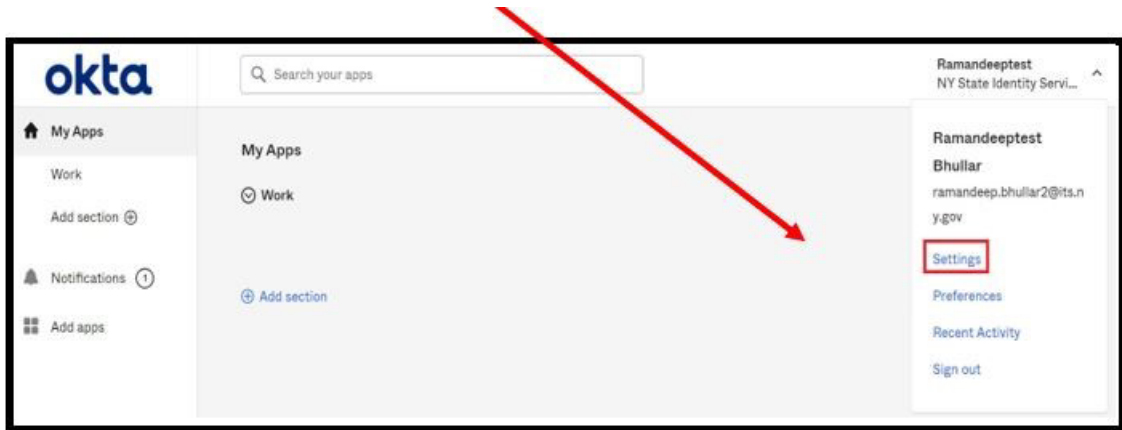
- 11.1.1 If you need to set up or remove the current mode of authentication that you have setup initially then go to <https://my.ny.gov/LoginV4/login.xhtml> and enter your NY.gov ID (i.e., Username) and the password and click on **Sign In**.



The image shows a screenshot of the NY.GOV ID login page. At the top, there is a yellow padlock icon followed by the text "NY.GOV ID" and "Secure Access to New York State Services". Below this, there are two input fields: "Username" and "Password". A large blue button labeled "Sign In" is positioned below the password field. Underneath the button, there are three links: "Forgot Username? or Forgot Password?", "Create an Account", and "Need help? Get Assistance". At the bottom, a disclaimer states: "This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply".

- 11.2 You will be directed to the OKTA Dashboard

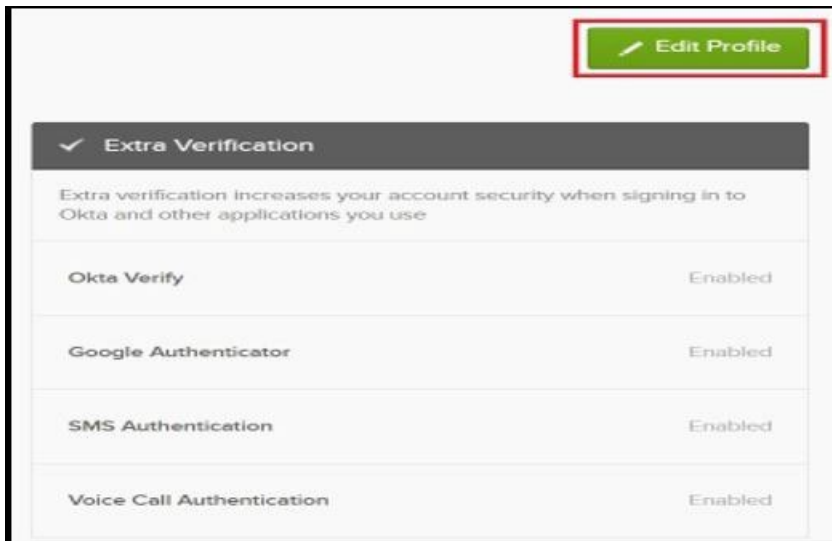
11.3 Under the profile, click on **Settings**



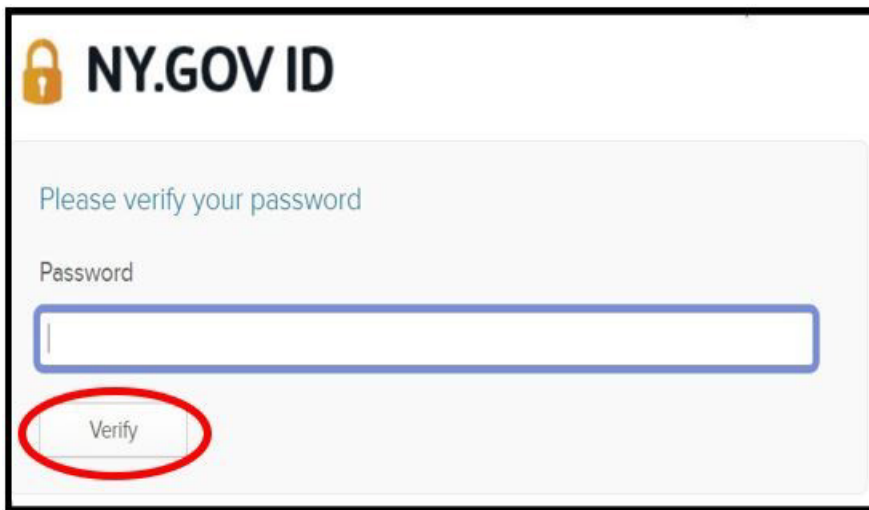
11.4 System displays the account personal information as well as the extra verification section.

11.5 Click on the edit profile button to add or remove mode of authentication.

NOTE: User should set up at least two authentication options



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



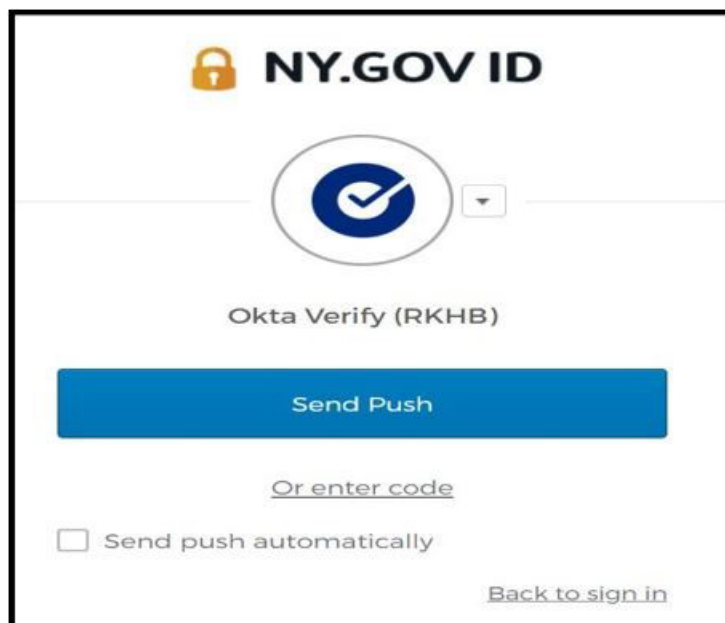
NY.GOV ID

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.

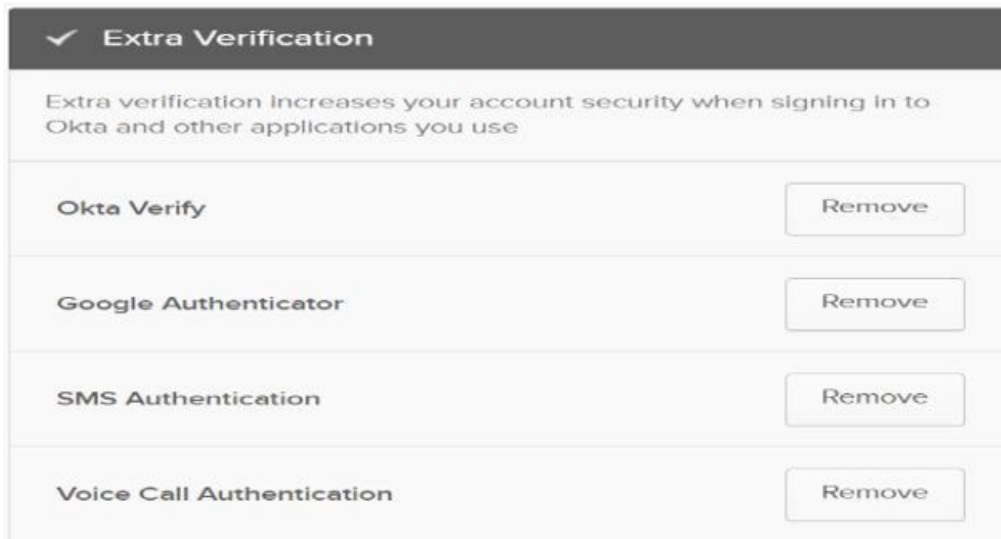


11.9 If Okta verify is selected, you can select either Send Push or enter code.

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.

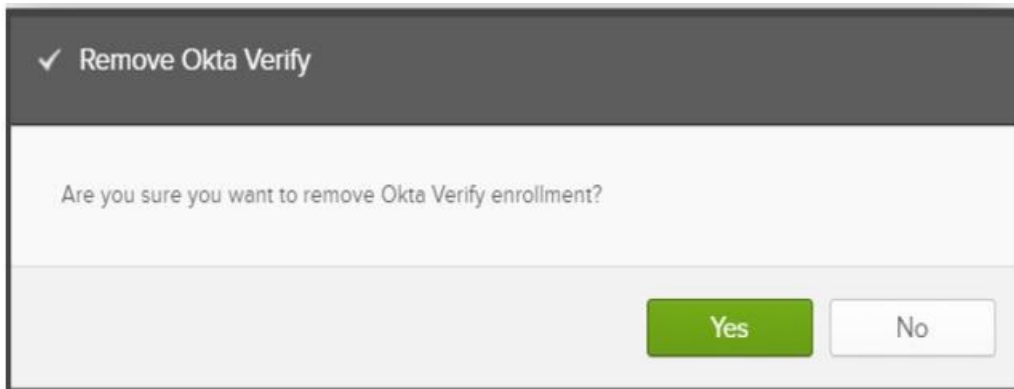


11.11 You are directed to add or remove additional mode of authentication from the extra verification section.



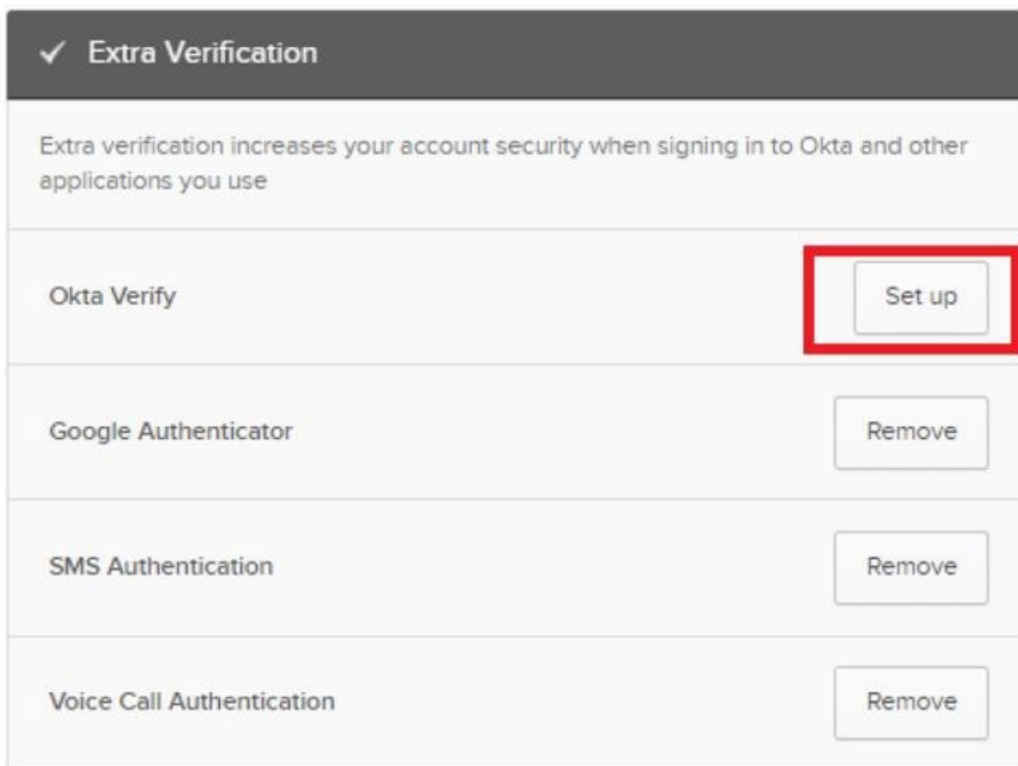
11.12 To remove a mode of authentication, you must click on the **Remove** button.

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 [refer to section 4](#).



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.

 **NY.GOV ID**
Secure Access to New York State Services

Username

Password

Sign In

[Forgot Username?](#) or [Forgot Password?](#)

[Create an Account](#)


Need help? [Get Assistance](#)

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) 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.



* indicates required field

First Name*

Last Name*

Email*

Email me the Username


This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) 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.



* indicates required field

First Name*

Last Name*

Email*

Email me the Username

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [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.

The screenshot shows a web page titled "FORGOT USERNAME SELF SERVICE". At the top, a red error banner reads "No Username found for the data entered below." Below the banner, the page title "FORGOT USERNAME SELF SERVICE" is centered. Underneath, instructions state: "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." The main content is a white form box with the "NY.GOV ID" logo. The form includes three input fields: "First Name*" with the value "raman", "Last Name*" with the value "hundal", and "Email*" with the value "ram@its.ny.gov". A blue button labeled "Email me the Username" is positioned below the fields. At the bottom of the form, a small disclaimer reads: "This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) 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.