iPortal

User Guide

Intended audience:

Ohio, US customers (Providers/Applicants) served by State of Ohio Department of Mental Health and Addiction Services (OHMHAS) applications and information technologies.

Table of Contents

1. **Overview**
    a. iPortal provides secure, centralized access to specific OhioMHAS applications. The following activities can be performed in iPortal:
        i. Create Organizations
        ii. Create Applications
        iii. Assign user access to applications
        iv. Assign user roles and permissions
        v. Assign organizations to user roles

2. **Who is this document for?**
    a. This document is intended for **'Users and Organization Administrators'** which provides the entire view and functionality available in iPortal.
        i. **User** is a person who is NOT employed or contracted by the state of Ohio. Considered a provider or business customer whom it is our pleasure to serve.
            a. Edit their own user account
            b. Create Organizations
        ii. **Organization Administrator** is a user who generally creates the first account for their organization. Organization Administrators can:
            a. Assign user access to applications
            b. Assign user roles and permissions
            c. Assign organizations to user roles

3. Login and First time user steps
    a. Access the OhioMHAS iPortal by logging into https://OHID.ohio.gov

Look for the BLUE icon

Ohio Citizens Login
This option is for everyone who is NOT a state
employee or contractor

OH|ID
Citizen Id
For Providers & Business Users with OHID
Read the How-To Guide
Request Help

    b. Returning so we can serve you again? Enter your User ID and Password. Please refer to highlighted areas for helps.

User ID

FORGOT YOUR USER ID?

Password

FORGOT PASSWORD?

Log In

Get login help

    c. First time to the site? Select **Create OHID Account**

d. If you need additional assistance with logging in, creating your OH|ID, resetting your password, or remembering your user id; Directions and additional links for assistance can be acquired using this link: Log in helps

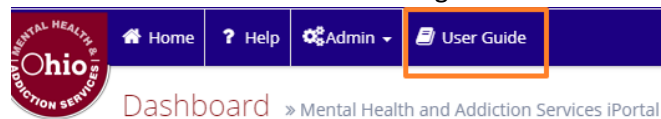e. First time user steps

    i. Access OhioMHAS web applications
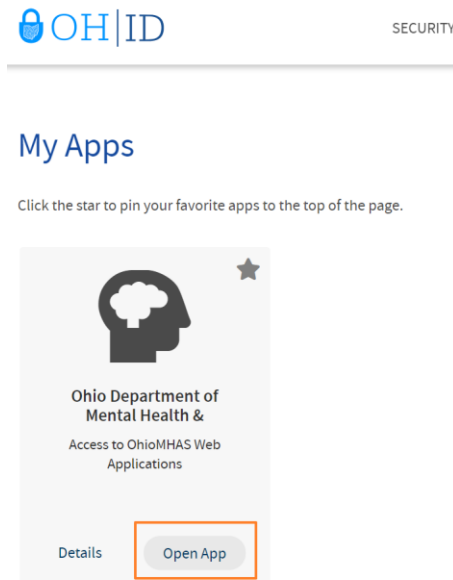
    ii. Register Organization (*see section 8*)

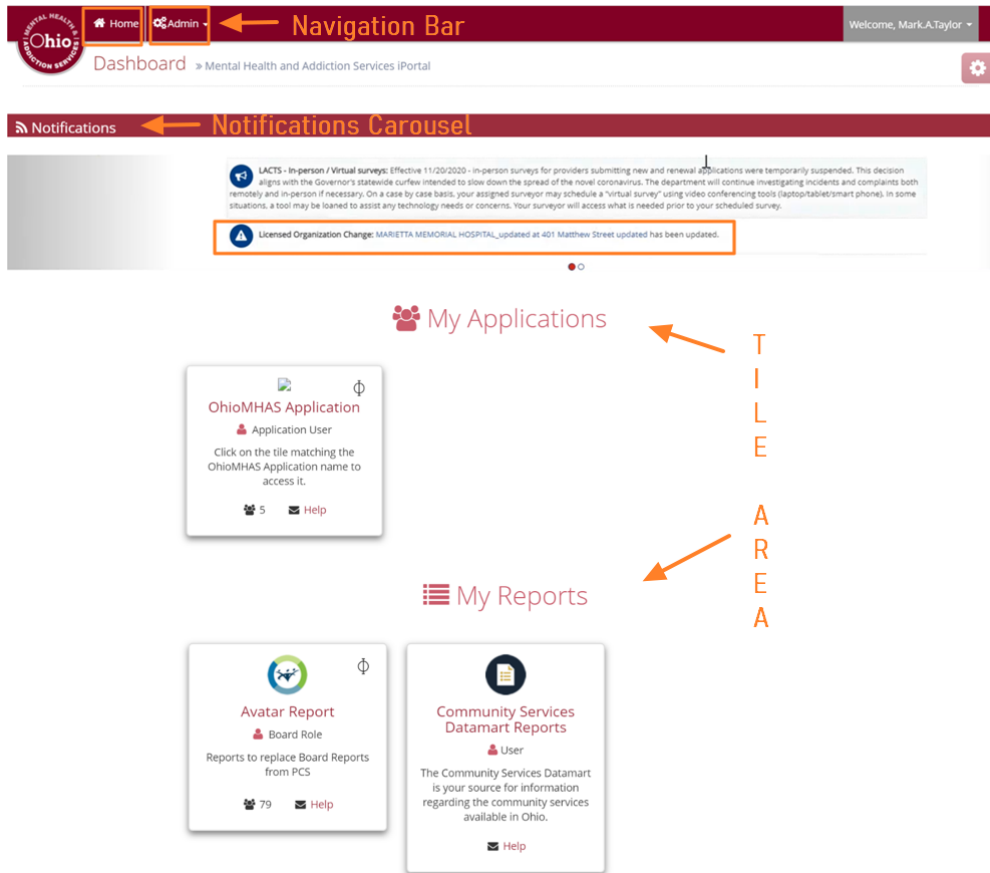   iii.Search your User to add role (*see section 9*)

4. **Dashboard**

    a. The iPortal Dashboard appears after successful login.

    b. The User Guide is listed on the Navigation Bar

    c. Announcement Carousel displays important system Notifications and Alerts specific to logged in user, by organizations associated and assigned role(s).

d. Request Access to Application
   i. Click in box 'Select an application to request access'. Select your application from drop down list and click submit request.

5. **Navigation Bar**
   a. Navigation Menu Options

   Note: The menu items available in iPortal will differ depending on the user's roles and permissions.

   i. <u>Home</u> – Click this link from any page in the application to navigate back to the iPortal dashboard.
   ii. <u>Admin</u> – Click this menu option to select admin items which you have been granted access. The following items are available in this menu:
      1. *Users* – View and assign roles for their organization(s)
      2. *Organizations* – Create, edit, and view organizations

6. **Tile Area**

      i. <u>My Applications</u> – Applications that you have been granted access will be tiled below the My Applications header. Click the tile to select the application you would like to access.

      ii. <u>My Reports</u> – Reports that you have been granted access will be tiled below the My Reports header. Click the tile to select the report you would like to access.

7. **Two-Step Authentication**
   a. The Two-Step Authentication functionality will only apply to applications or reports containing Personal Health Information (PHI) information. External Users will need to perform this function, if the application or report they are accessing contains PHI. Any application or report containing PHI will have this symbol in the application/report tile:

   b. Click on a tile under 'My Applications' or 'My Reports'. Select the application or report that contains PHI.
      i. The Pass Code Authentication page will open, and an email notification will be sent to the User with a temporary Pass Code.
      ii. The pass code is only valid for 30 minutes from the time the system has generated the email. Click the Email New Pass Code button if the pass code expires, and a new pass code will be sent to the user's email address.
   c. Enter the authentication Pass Code.
   d. Click the 'Submit' button. The application home page will open.
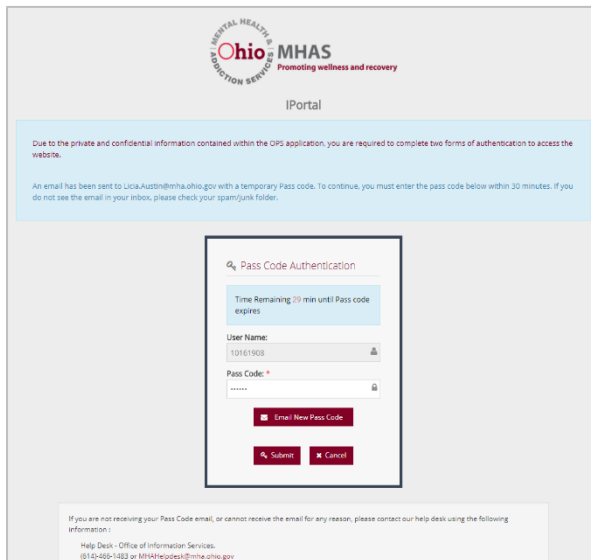
8. **Organizations**

Description: Organizations help control user access to applications. When a user is assigned to an application/role/feature, they can also be assigned to an organization if the application requires this.

a. Edit Organizations
   i. Click the Admin menu option.
   ii. Select the Organization menu item. The Search Organization page will open.
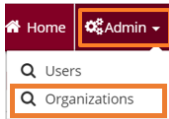
   iii. Enter/select at least one search criteria.
   iv. Click the Search button. A List of Organizations matching the search criteria will appear.

   i. If you are not an Organization Administrator that's associated with results, you will get no results. Click the Clear Search button to refresh the page.

ii. If you have an associated and are an Organization Admin a clickable Action Edit field will appear.

Action	Provider/Organization Legal Name	Doing Business As	Location Address	Organization Type	Status	FTID
Edit	Rose Recovery	Rose Recovery	6638 Tollegate Ave	Government Organization	Opened	112344321

b. Register New Organization

   i. Click the Home menu option. 🏠 Home

   ii. Click Register Organization button. Register Organization

   iii. Select the Organization menu item. The Search Organization page will open.

Search   Clear Search   Create Organization

iv. Create My Organization windows opens, Enter your EIN or FTID number into the search by TAX ID box. Click the Search button.

Find my Organization

Enter your company's Tax ID to see if it is already registered with the State.
Do not use dashes(-) when searching using your company's Tax ID, only use numbers.

Enter your EIN or FTID number here ➝ 123456789

Search   Clear

v. If search finds a organization. Go back to section '8 a)' of this manual, Edit Organization.

Find my Organization

Enter your company's Tax ID to see if it is already registered with the State.
Do not use dashes(-) when searching using your company's Tax ID, only use numbers.

123456789

Search   Clear

List of Organizations

Organization Legal Name	Doing Business As	Status	Address
Test Rhonda	DemoRhonda	Opened	123 W Main, Columbus

The TAX ID entered is already registered. Adding additional addresses is not currently supported with your access, so if the address you need is not included, please email helpdesk@mha.ohio.gov with the new address.

vi. If search finds no Organizations, Click the Register Organization button.

⚠ No Organizations Found.   ✕

Your organization is not yet registered with us. To continue, we will need to collect some additional information. It will take approximately 5 to 10 minutes to complete the rest of your registration.

Cancel   Register Organization

v. Answer all Organization Type questions. Additional questions may appear, based on your answers.

Click Next.   Click me for more details   * I am mandatory

vii.   Enter Organization Details

1.   Legal Name – * It is a mandatory field

a.   This is name listed on your tax documentation

b.   **PLEASE** <mark>**verify the spelling matches your tax documentation**</mark>

c.   **After you register your organization, The Legal Name field is not editable. Any change requires you to open a helpdesk and result in wait time to correct.**

2.   Doing Business As (DBA) - It is a not a mandatory field

a.   Example DBA: OhioMHAS *(Where legal name would have been entered above as Ohio Department of Health and Addiction Services)*

3.   Organization Website – it is not a mandatory field

a. Needs be fully qualified example www.domainname.org)
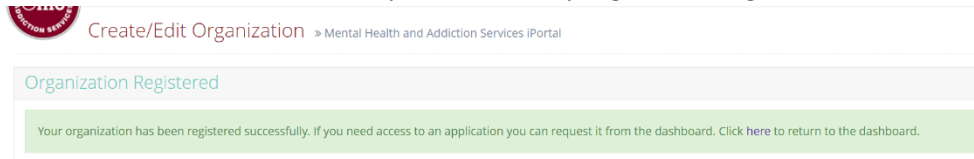
| What is Your Organization's Website?	Enter Company Website	
Emails of Organization Administrators ❓	Email Address	Add Email

4. Emails of Organization Administrators
   a. * It is a mandatory field you must enter at least one email.
   b. Organization Administrator is usually the same person registering a new organization.
   c. You can add multiple Organization Administrators; However, you must click the Add Email button after every submission.
   d. Remove an Organization Administrator by clicking the delete scissor icon button.

5. You will see this screen once you successfully register an organization.

Create/Edit Organization » Mental Health and Addiction Services iPortal

Organization Registered

Your organization has been registered successfully. If you need access to an application you can request it from the dashboard. Click here to return to the dashboard.

   a. The next time you log in you will have Organization Administrators role.
   b. If you need the role immediately, you must log out and back in. Log out is on the upper right. Click down arrow to the right of Welcome, your name

Welcome, Jaren.Zones ▼
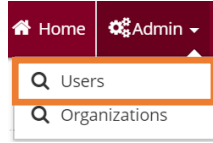
👤 My Account

⏻ Logout
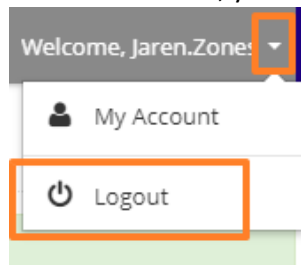
9. Users

Description: This section describes how to grant users secure access to OhioMHAS applications and assign them roles within these applications.

a. Search for a User Account
   i. Click the Admin menu option from the navigation bar.
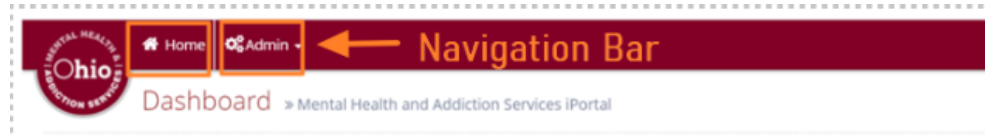
ii. Select the Users menu item. The User page will appear.

iii. Enter at least one search criteria.

iv. Click the Search button. The List of Users table will appear with results matching the search criteria.   *Note that user must have a OH|ID to appear in search result list. If they have not done so, please have them follow steps in section 3 e) **Create OH|ID Account** above.
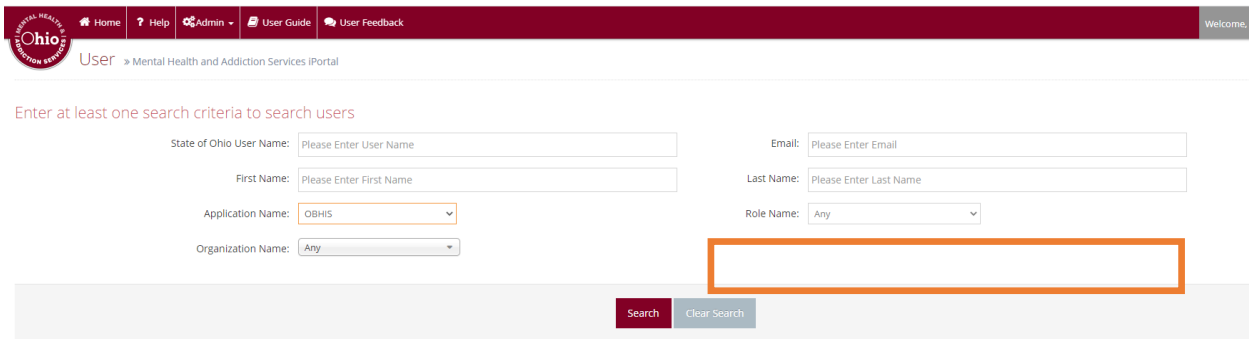
v. Search Results - List of Users is displayed

vi.

b. Assign a new Role
   i. Click Assign Role
   ii. Assign Role Window opens

Assign Role » Mental Health and Addiction Services iPortal

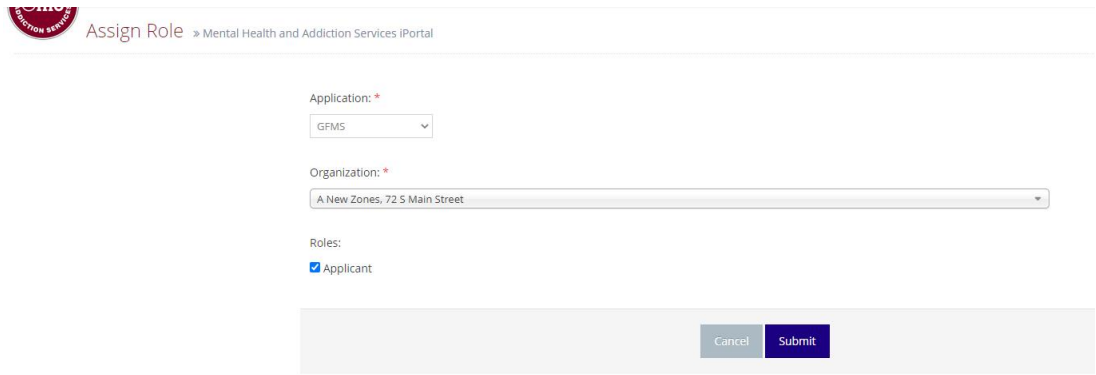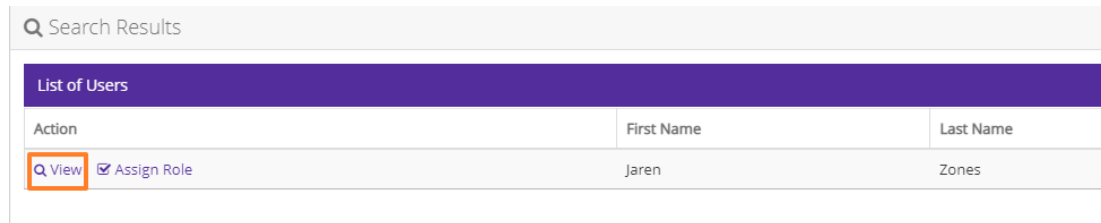Application: *

GFMS

Organization: *

A New Zones, 72 S Main Street

Roles:
☑ Applicant

Cancel   Submit

       iii.   Select Application and Organization from drop down list. Select desired Role(s)

c.   View existing User roles and applications

Q Search Results

List of Users		
Action	First Name	Last Name
Q View ☑ Assign Role	Jaren	Zones

       i.   Click View to add user to your organization or assign role.
       ii.   View user window will open.

View Non-State User » Mental Health and Addiction Services iPortal

iii. At bottom of window, you will see listing of Applications, Role Name where selected user you are viewing has permissions.

Application	Role Name	Assigned By:	Assigned Date	Actions
Authorization Request	General Access	IOP Integration	8/3/2021 12:04:16 PM	Add Organization +
File Uploader	Uploader	Jaren.Zones	8/3/2021 3:09:07 PM	Add Organization +
LACTS	Organization Administrator	Jaren.Zones	8/3/2021 3:09:07 PM	Add Organization + Delete
MHASPortal	Portal User	IOP Integration	8/3/2021 12:04:16 PM	Add Organization +
MHASPortal	Organization Administrator	Jaren.Zones	8/3/2021 12:08:23 PM	Add Organization + Delete

iv. If Add Organization is greyed out, Role is not available, or User has not been assigned yet. click on the + to view existing organizations per application and role

Actions

Add Organization +

    v.   If Add Organization is not greyed out, click on the + to view existing organizations per application and role

Add Organization – 🗑 Delete	
Organization	**Actions**
402 Home, 30 e broad st	🗑 Delete
Scioto County Counseling Center Inc., 816 4th Street	🗑 Delete

w.
To Add Organization. Click on Add Organization button

Search Organizations   ✕

Doing Business As:	Enter Doing Business As
	OR
Organization Legal Name:	Enter Organization Legal Name
	OR
Tax ID (9 Digits without dashes):	Enter Organization Tax ID

Search   ✕ Cancel

d. Remove User

    i.   From all Organizations

        -Click on Delete to the right of Add Organization button

Add Organization + 🗑 Delete

        -Answer OK to pop up

appsuat.mha.ohio.gov says

Are you sure you want to unassign role - Organization Administrator?

OK   Cancel
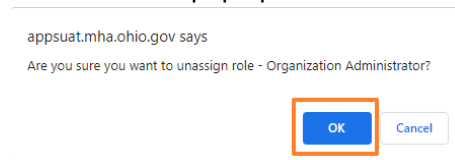
    ii.   From a single Organization

        -Click on the + to the right of Add Organization button

Add Organization + 🗑 Delete

        -Multiple Organizations will list. Only click on Delete next to desired

Add Organization ▬ 🗑 Delete

Organization	Actions
402 Home, 30 e broad st	🗑 Delete
Scioto County Counseling Center Inc., 816 4th Street	🗑 Delete

-Answer OK to pop up

appsuat.mha.ohio.gov says

Are you sure you want to unassign role - Organization Administrator?

OK   Cancel