

YouTube Video Training: [SETS Provider Portal Access](#) (3:17)

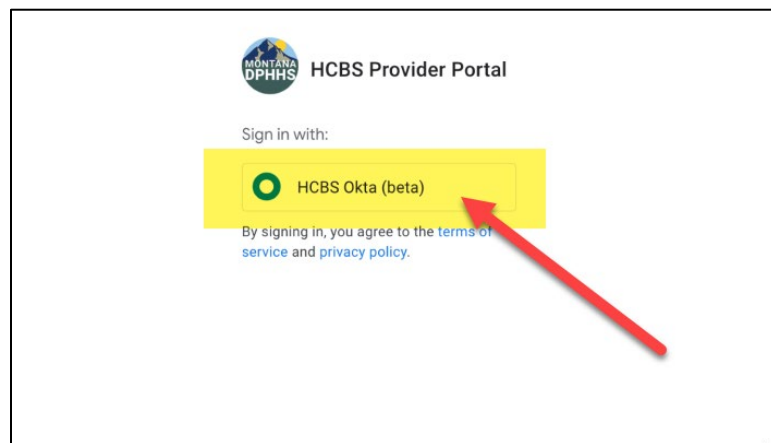
Requesting SETS Provider Portal Access

All Provider Users must use the state of Montana's authentication method, Okta, to access the SETS Provider Portal. This requires a Provider User to register an email account with Okta.

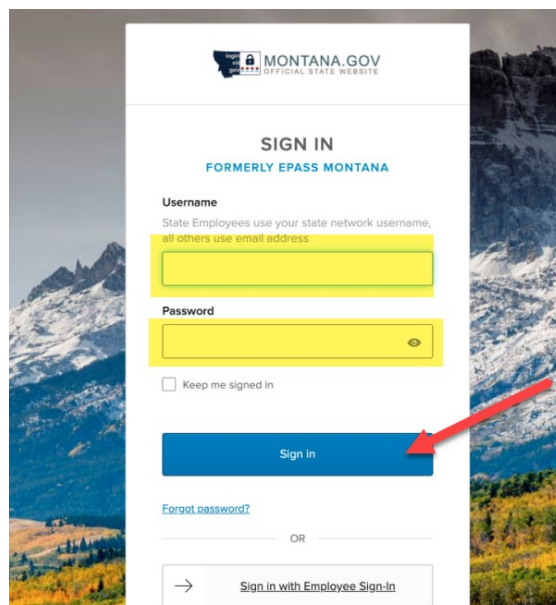
Step 1: Connecting with Okta

If You Already Have an Okta Account

1. Click [this link to the SETS Provider Portal](#).
2. You will reach the Okta (beta) page. Click the HCBS Okta (beta) button.

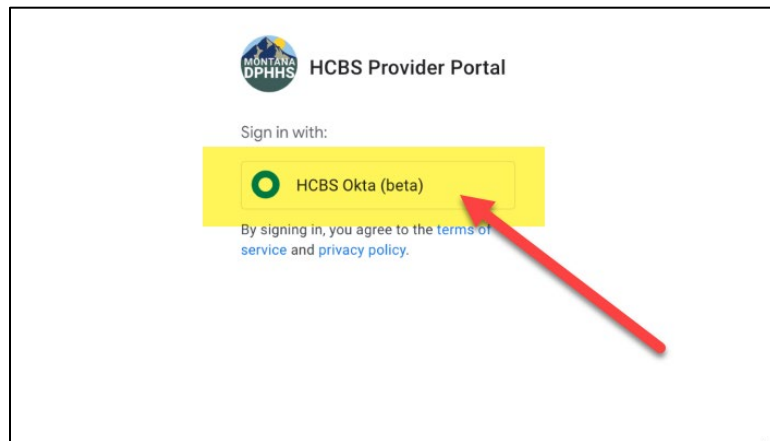


3. You will reach the Okta log-in page, where you will log-in with your existing public (meaning a non-state of Montana employee) Okta account:
 - a. Enter your existing public Okta Username and Password.
 - b. Click Sign-in.

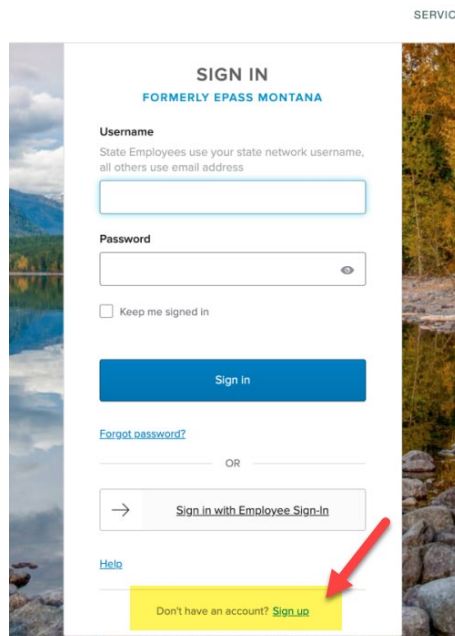


If You Do Not Already have an Okta Account

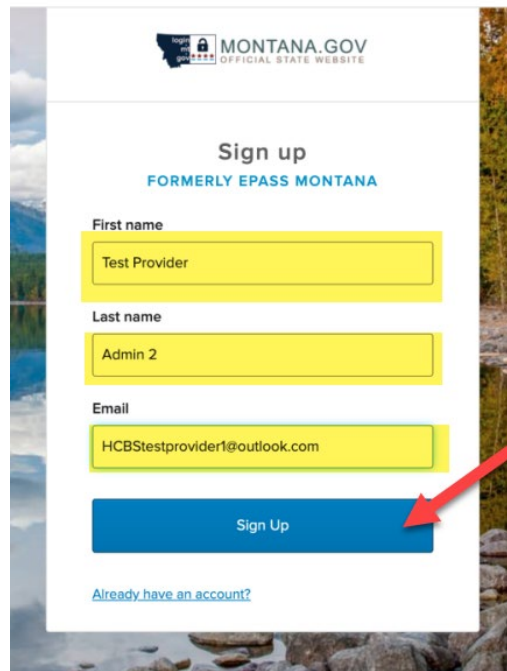
1. Click [this link to the SETS Provider Portal](#).
2. You will reach the Okta (beta) page. Click the HCBS Okta (beta) button.



3. Sign-up for an Okta account by clicking the “Sign up” link at the bottom of the page.



4. Complete the required fields and click the Sign-up button.



MONTANA.GOV
OFFICIAL STATE WEBSITE

Sign up
FORMERLY EPASS MONTANA

First name
Test Provider

Last name
Admin 2

Email
HCBStestprovider1@outlook.com


Sign Up

[Already have an account?](#)

5. You will be prompted to Set up additional security methods via Email, Password, and Security Question. This is necessary to protect your account. Click the Set up button under each method (one at a time) and follow the directions/prompts.


Set up security methods

FORMERLY EPASS MONTANA

 HCBStestprovider1@outlook.com


Security methods help protect your account by ensuring only you have access.

Set up required




Email
Verify with a link or code sent to your email
Used for access or recovery

Set up



Password
Choose a password for your account
Used for access

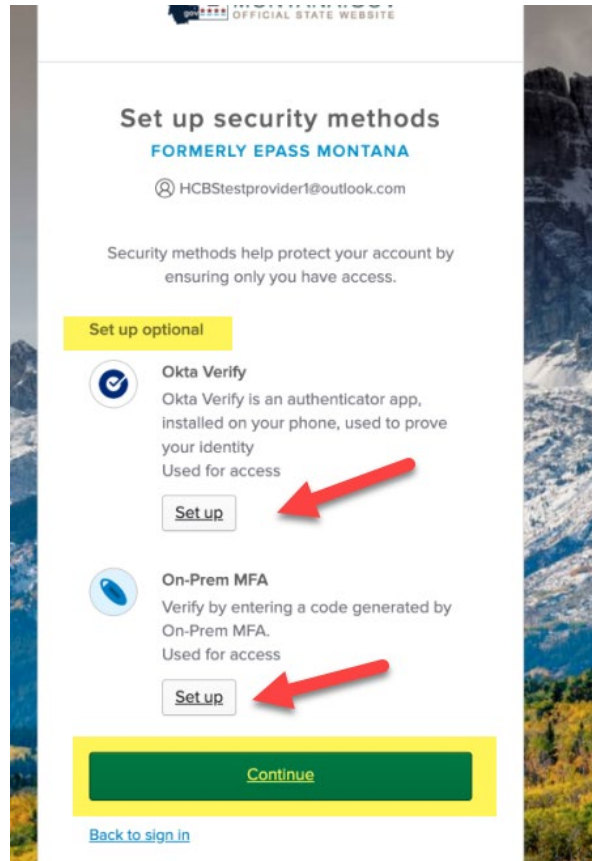
Set up



Security Question
Choose a security question and answer that will be used for signing in
Used for recovery

Set up

6. After setting up the additional, required security methods you may be asked to set up additional, **optional** security methods (note, this is not required for use of the SETS Provider Portal).
 - a. If desired, follow the same Set up procedure for each method that you followed for the required methods and then click the Continue button to proceed.
 - b. If you wish to skip the optional security method set ups you may skip them and click the Continue button to proceed.



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Set up security methods

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Security methods help protect your account by ensuring only you have access.

Set up optional



Okta Verify
Okta Verify is an authenticator app, installed on your phone, used to prove your identity
Used for access

[Set up](#)



On-Prem MFA
Verify by entering a code generated by On-Prem MFA.
Used for access

[Set up](#)

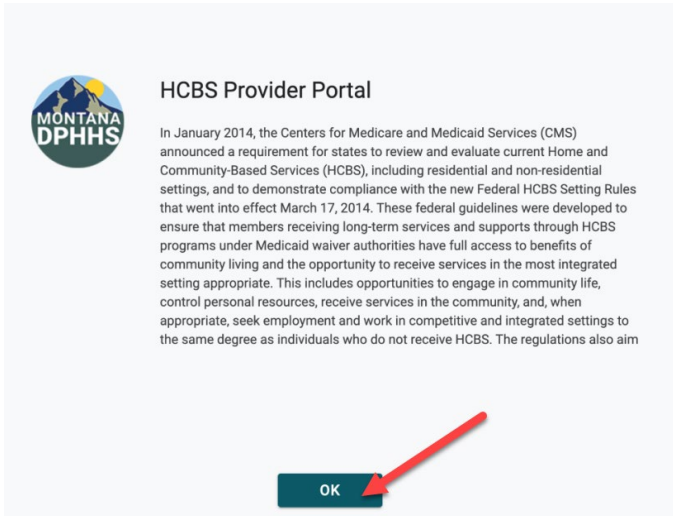
[Continue](#)

[Back to sign in](#)

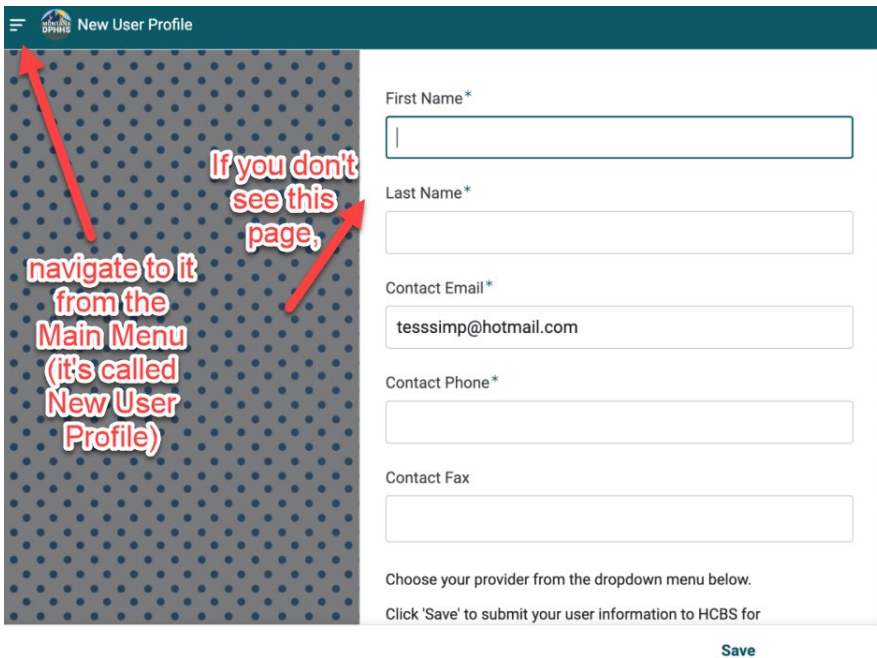
Step 2: Requesting a SETS Provider Portal Role

After signing-in with your public Okta account, you will be taken to the SETS Provider Portal Welcome page.

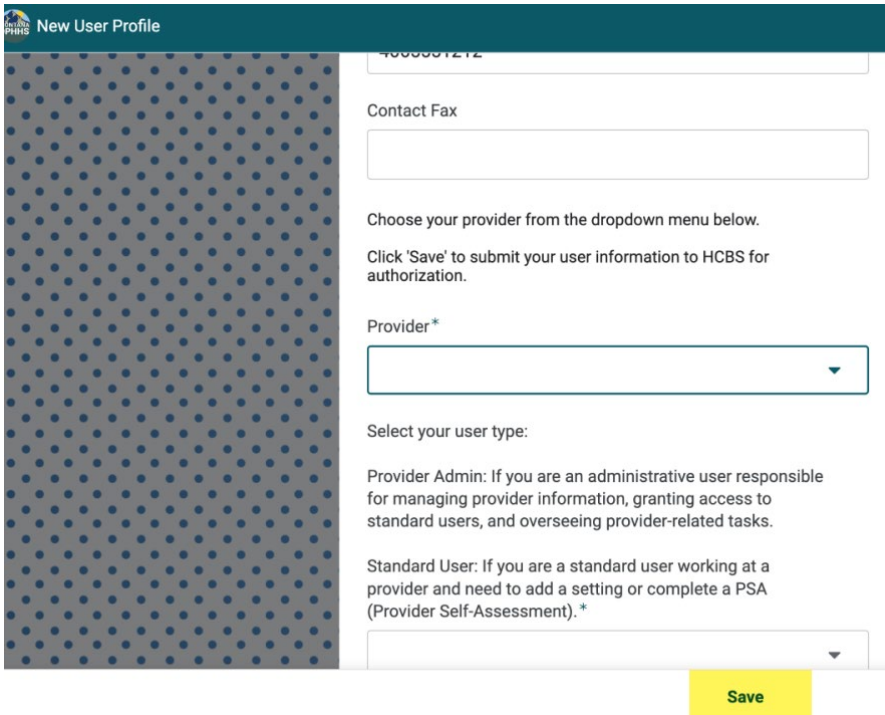
1. Click OK to proceed.



2. After clicking OK, you will enter the SETS Provider Portal, where you should be greeted with the New User Profile form page. If you are not greeted with the New User Profile form page, you must navigate to it by accessing it from the Main Menu (three horizontal bars in the upper left-hand corner of the page).



3. Complete the required information on the New User Profile page, including selecting your Provider and selecting which access role you are requesting. Access role options are Provider Admin, Standard User, or Viewer. Click Save to submit your request.



New User Profile

4000001212

Contact Fax

Choose your provider from the dropdown menu below.

Click 'Save' to submit your user information to HCBS for authorization.

Provider*

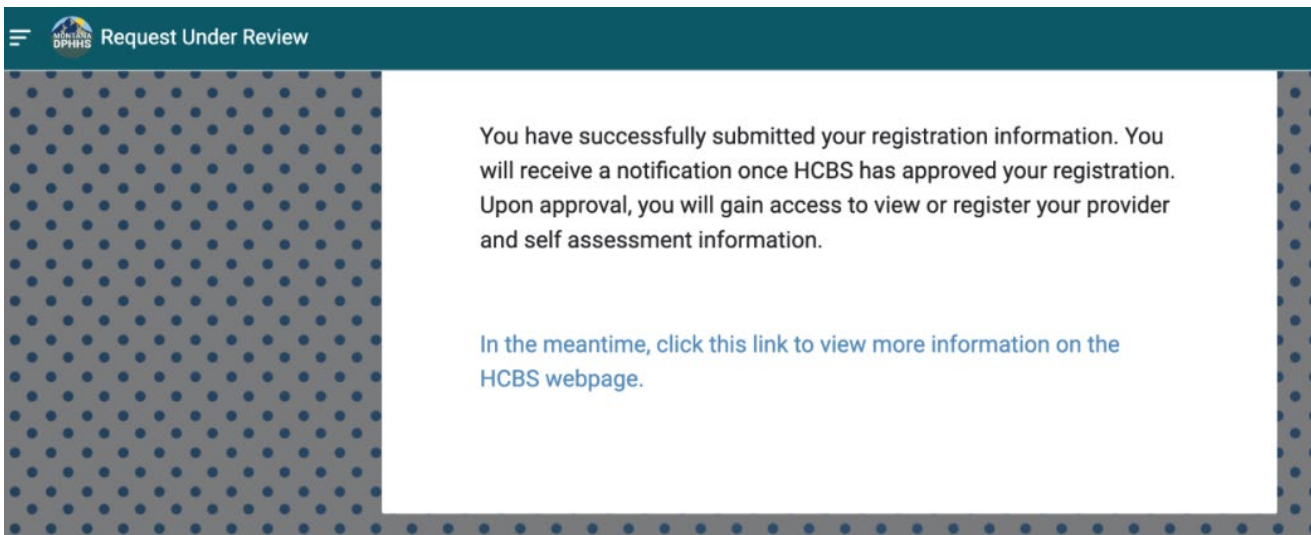
Select your user type:

Provider Admin: If you are an administrative user responsible for managing provider information, granting access to standard users, and overseeing provider-related tasks.

Standard User: If you are a standard user working at a provider and need to add a setting or complete a PSA (Provider Self-Assessment). *

Save

4. After saving the New User Profile page, you will receive a confirmation message.

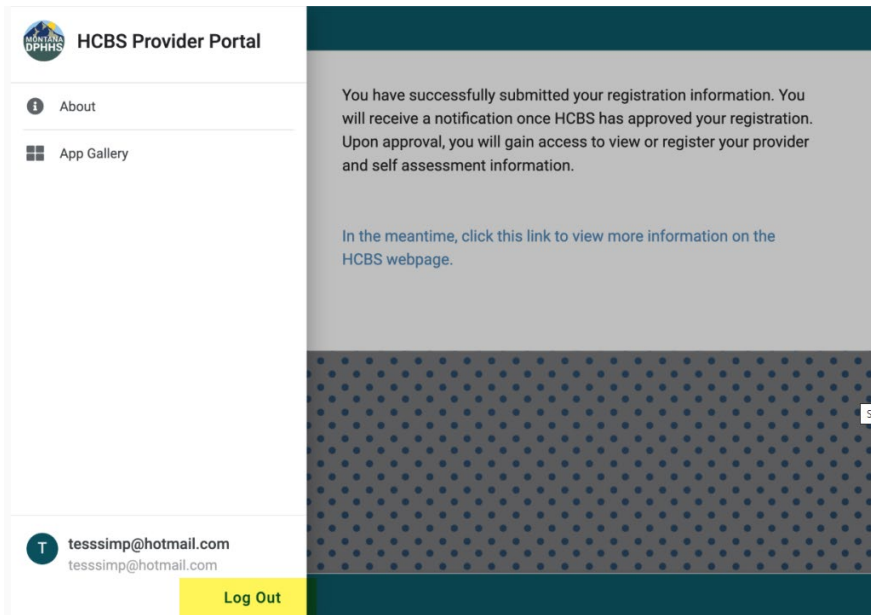


Request Under Review

You have successfully submitted your registration information. You will receive a notification once HCBS has approved your registration. Upon approval, you will gain access to view or register your provider and self assessment information.

[In the meantime, click this link to view more information on the HCBS webpage.](#)

5. Be sure to log out from the Main Menu when finished Saving your role Request.



Step 3: Receiving Approval or Denial

1. If you are the first Provider Admin from your Provider requesting access, HCBS staff must take action on (approve or deny) your request. **You will receive an email notification once your access is approved or denied.**
2. If you are not the first Provider Admin from your Provider requesting access, then someone from your Provider must take action on your request. **You will receive an email notification once your access is approved or denied.**

Accessing SETS Provider Portal After Approval

1. Once you receive word that your access has been approved you will be able to log-in to the HCBS Provider Portal using the same [link to the SETS Provider Portal](#) listed above. You will see more menu options from the Main Menu once logged in:

