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

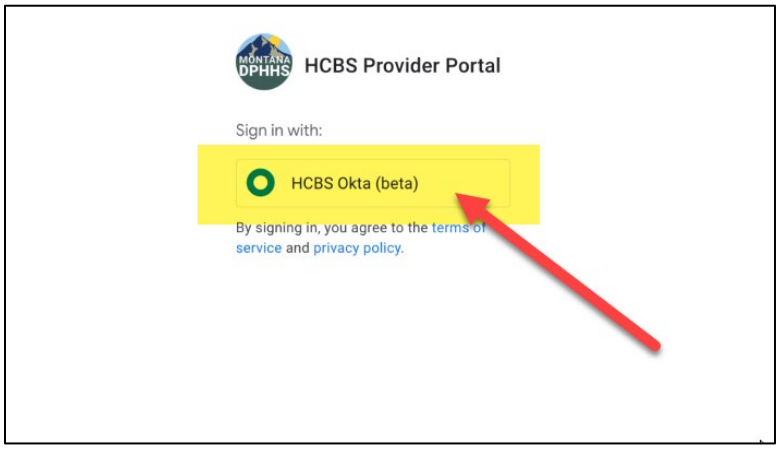
Requesting SETS Provider Portal Access

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.

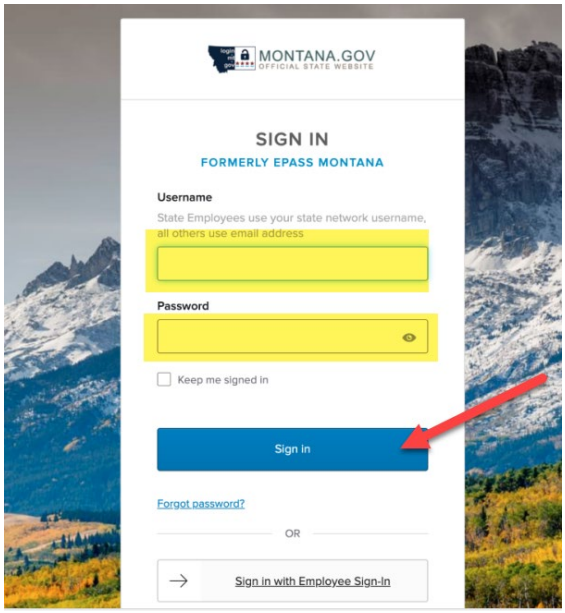
Step 1: Connecting with Okta

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.

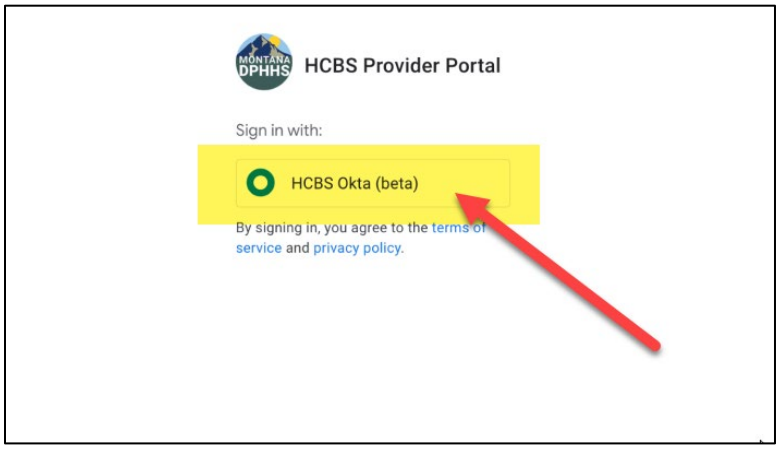


3. You will reach the Okta log-in page, where you will log-in with your existing public (meaning a non-state of Montana employee) Okta account:
    a. Enter your existing public Okta Username and Password.
    b. Click Sign-in.

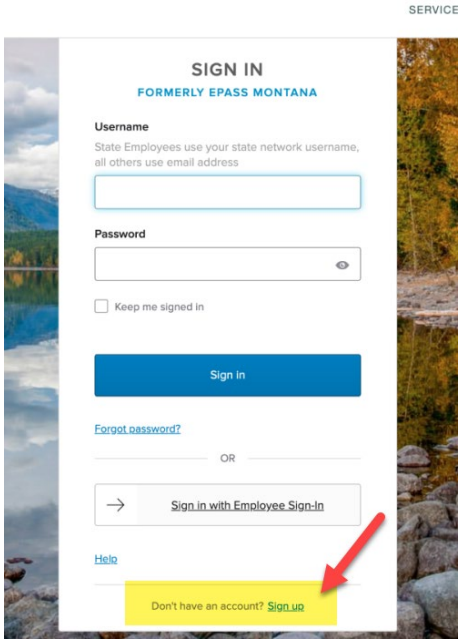


If You Do Not Already have an Okta Account

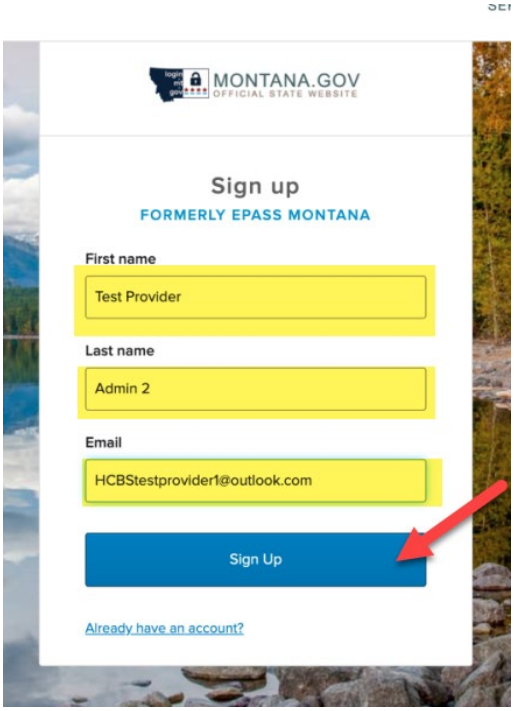
1. Click this link to the SETS Provider Portal.
2. You will reach the Okta (beta) page. Click the HCBS Okta (beta) button.



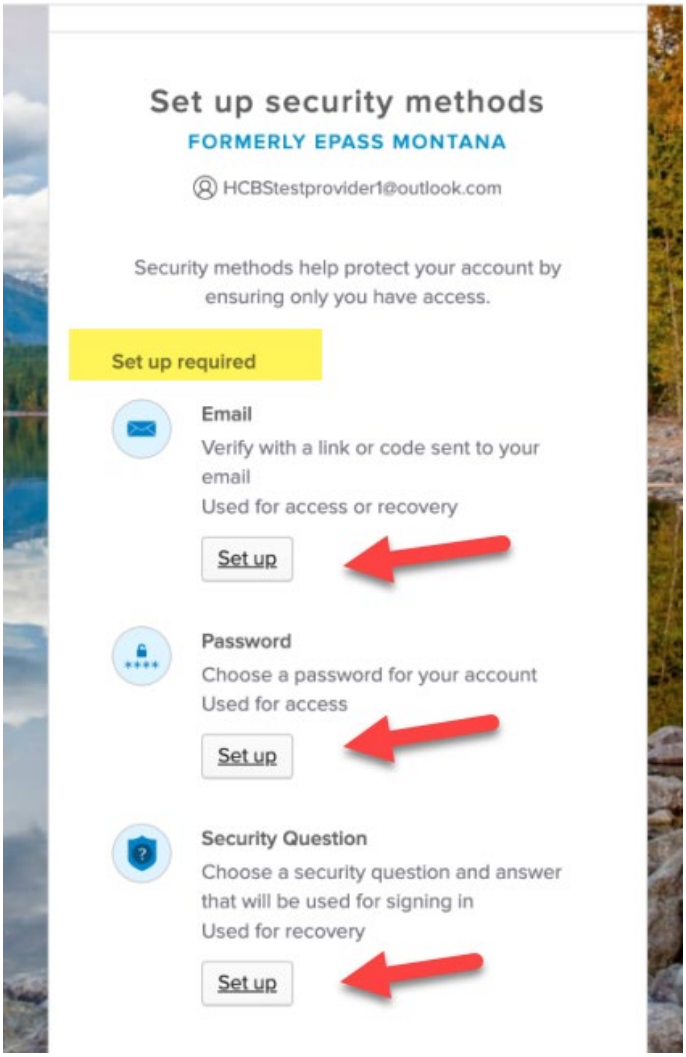
3. Sign-up for an Okta account by clicking the “Sign up” link at the bottom of the page.



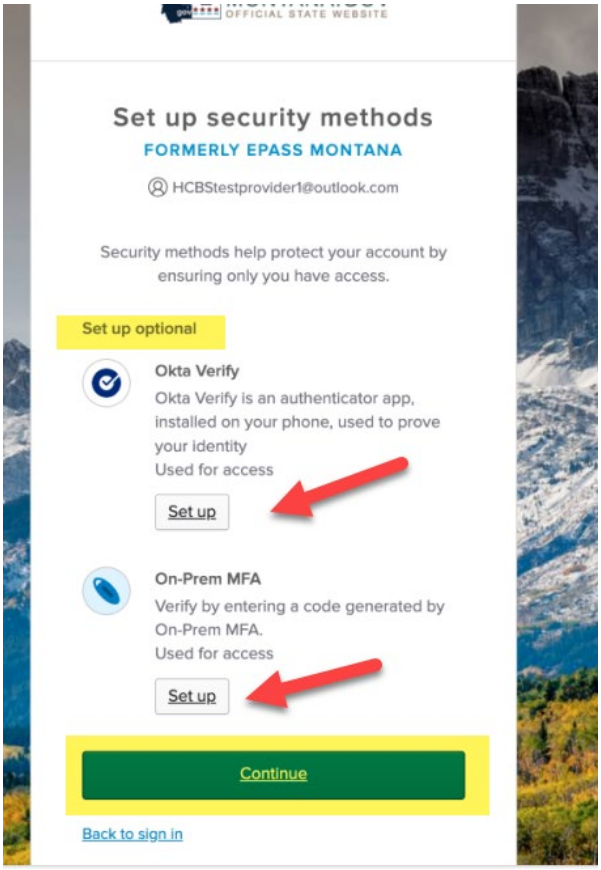
4. Complete the required fields and click the Sign-up button.



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

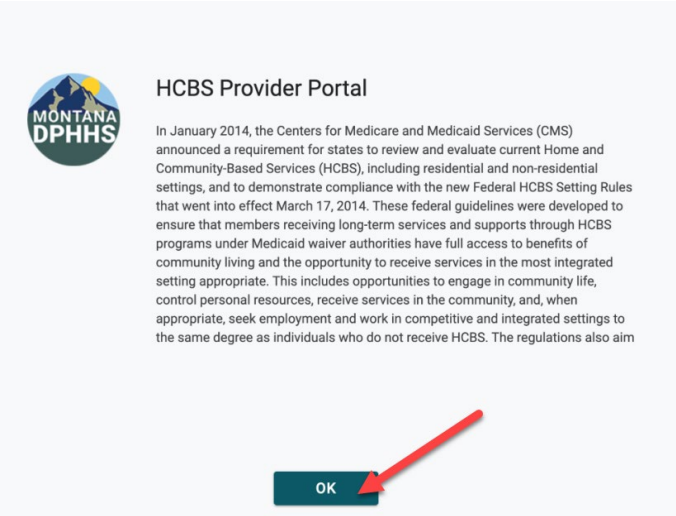
6. After setting up the additional, required security methods you may be asked to set up additional, **optional** security methods (note, this is not required for use of the SETS Provider Portal).
    a. If desired, follow the same Set up procedure for each method that you followed for the required methods 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.



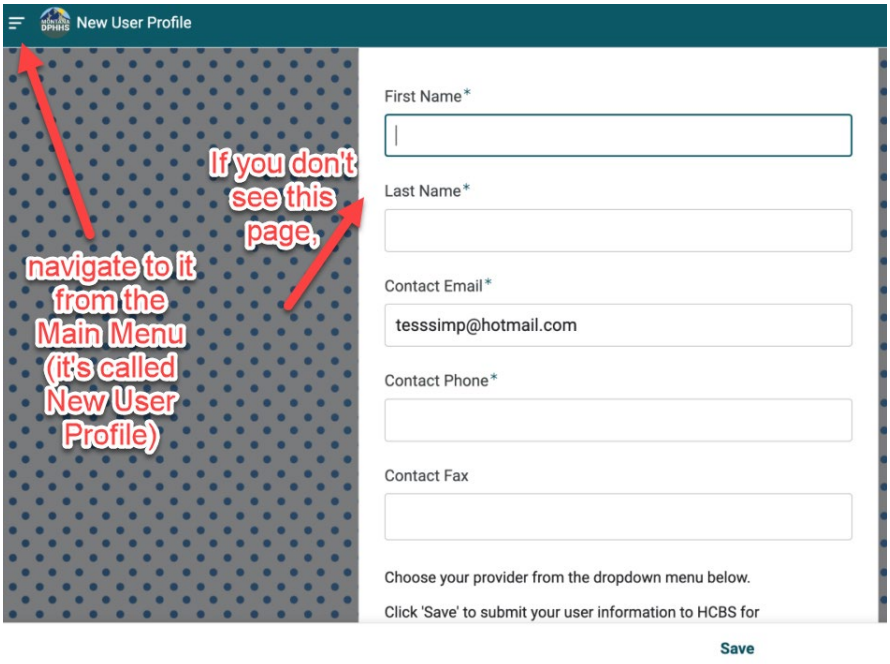
Step 2: Requesting a SETS Provider Portal Role

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

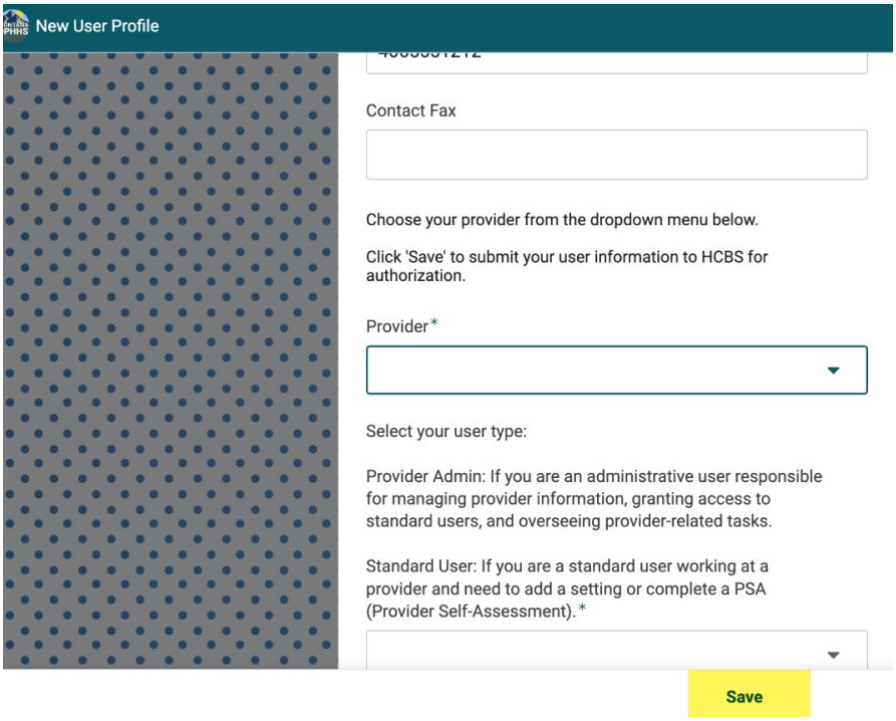
1. Click OK to proceed.



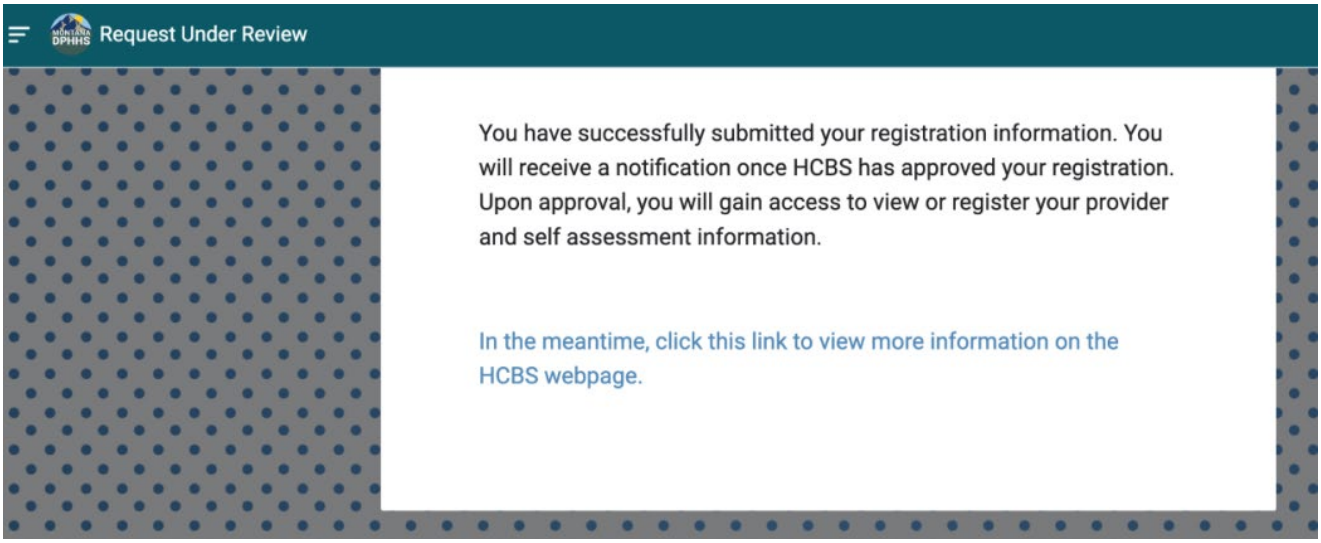
2. After clicking OK, you will enter the SETS Provider Portal, where you should be greeted with the New User Profile form page. If you are not greeted with the New User Profile form page, you must navigate to it by accessing it from the Main Menu (three horizontal bars in the upper left-hand corner of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



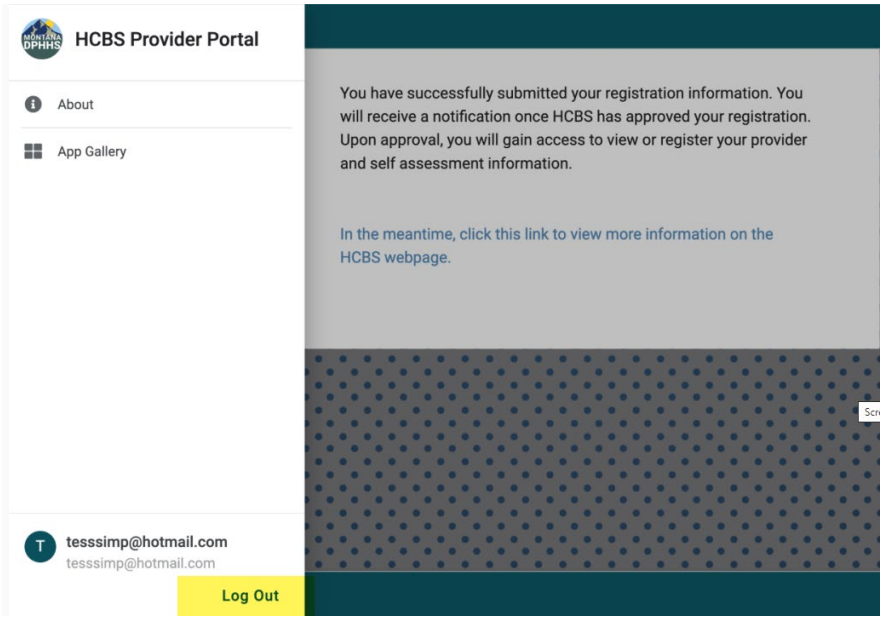
3. Complete the required information on the New User Profile page, including selecting your Provider and selecting which access role you are requesting. Access role options are Provider Admin, Standard User, or Viewer. Click Save to submit your request.



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

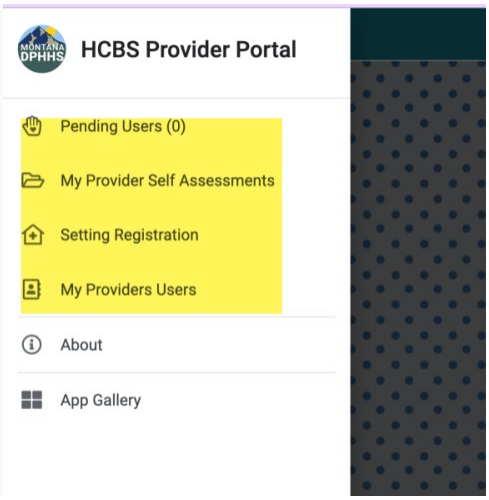


5. Be sure to log out from the Main Menu when finished Saving your role Request.



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: