

# Identity Access Management Portal For Accessing eMedNY Apps

## User Guide

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## 1. Overview

This manual will provide the following to providers and credentialing staff:

- A description of the Identity Access Management (IAM) Portal for accessing eMedNY provider-related apps
- Steps to create an eMedNYID
- Instructions for using the eMedNYID and the IAM Portal
- Instructions for updating and maintaining an eMedNYID
- Common log-in issues and how to troubleshoot them

### 1.1. How to Use this Manual

In addition to informational and instructional language, this manual contains:

- *Tables*: From Section 3 onward, steps or functionality that may be possible within the application are highlighted. Section numbers (3.1, for example) indicate the Manual location that contains additional information.
- *Figures*: Screenshots illustrating the particular topic.

### 1.2. Release Notes

This section contains release notes for the IAM Portal.

*Table 1 - Applications Available through the IAM Portal List*

Release Number	Manual Version	Release Notes
1.0	2022-1 (3/31/2022)	Initial release of the IAM Portal.
2.0	2025-1(3/5/2025)	MFA Update

## 2. The IAM Portal

The IAM Portal is an Okta-based single-sign on access management solution for logging into apps. This enables users to access authorized apps utilizing the same User ID and password.

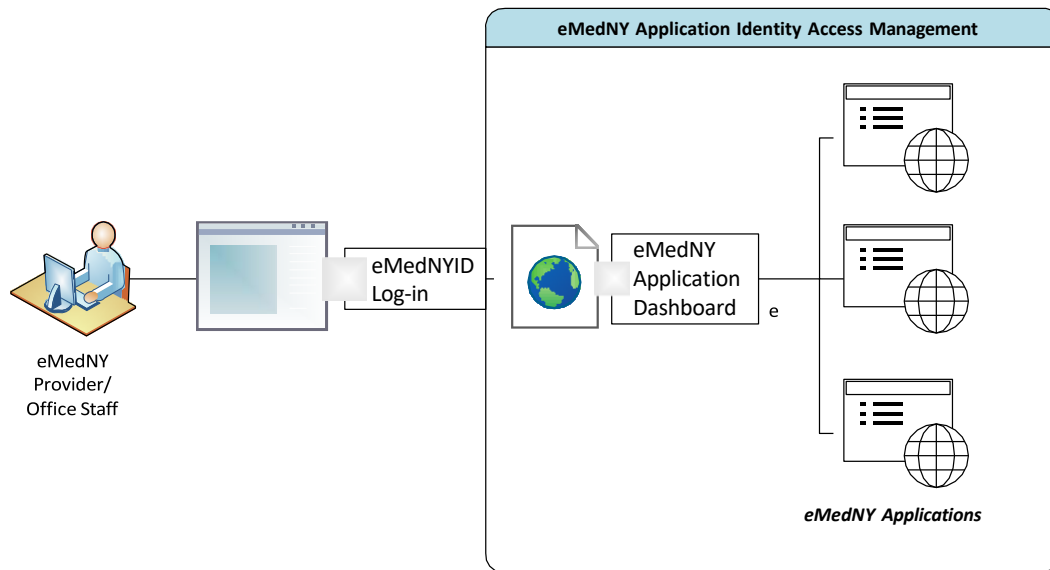


Figure 1 - Diagram of eMedNY Application IAM Portal Workflow

### 2.1. Apps Available Through the IAM Portal

The column on the left lists those apps which are accessible only through the IAM Portal. Apps listed in the right-hand column must be accessed by current user log-in methods. For further information on all apps, refer to the [eMedNY Tools Center](#).

Table 2 - Apps Available Through the IAM Portal

Apps Available Through the IAM Portal	Apps Not Available Through the IAM Portal
Provider Enrollment Portal	ePACES
Communications Inbox	eXChange
eMedNY Application Dashboard	Provider Web Portal
	PTAR
	EHR
	PXpress
	eMedNY Submitter Dashboard
	Provisional Temporary Provider Enrollment Portal
	Facilities Practitioners NPI Reporting
	Electronic Visit Verification

## 2.2. Technical Requirements

To create an eMedNYID and utilize the IAM Portal a user must have:

- Internet access
- A modern browser (e.g., Microsoft Edge, Chrome, Firefox, Safari)
- An email address
- One or more Multi-Factor Authentication devices (e.g. Cell phone, a YubiKey. See **Section 3.2** for more information on each).

### 3. The IAM Portal eMedNYID

The **eMedNYID** is used to access apps via the IAM Portal.

The eMedNYID is the same as the user's email address that is submitted in the steps listed in **Section 3.1**, below. The eMedNYID sign up process does not require assistance from the eMedNY Call Center.

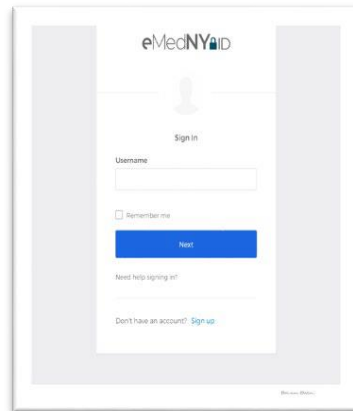
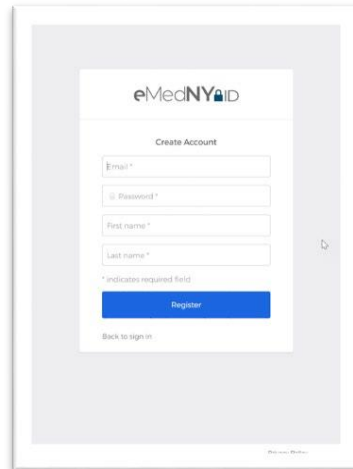
All steps detailed in the table below must be completed to successfully create the eMedNYID.

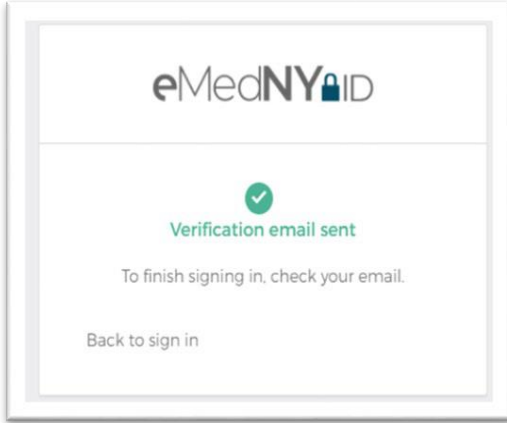
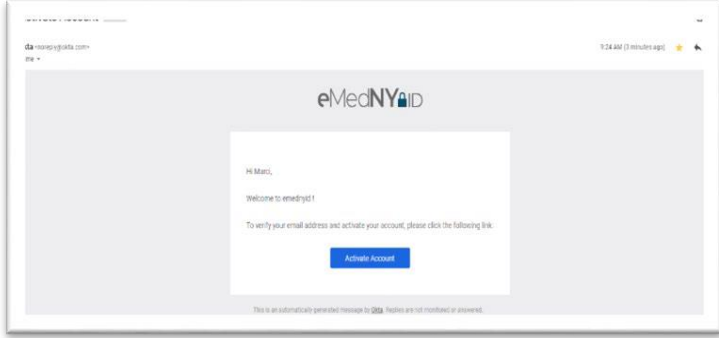
Table 3 - Steps to Create an eMedNYID

Step #	Action	Section
1	Sign up and activate the email and password.	3.1
2	Set up at least one Multi-Factor Authentication method.	3.2
3	Create a security question.	3.3

#### 3.1. Sign Up and Activate the Email and Password

Table 4 - How to Access the IAM Portal, Sign Up and Activate the eMedNYID

Actions	Display
<ol style="list-style-type: none"><li>Go to <a href="https://iam.emedny.org">https://iam.emedny.org</a></li><li>Click <b>Sign Up</b>.</li></ol>	
<ol style="list-style-type: none"><li>Enter an email address.</li><li>Create a password that is at least 16 characters long <i>and</i> has:<ul style="list-style-type: none"><li>At least one lowercase letter</li><li>At least one uppercase letter</li><li>At least one number</li><li>At least one symbol (for example: !, @, \$, %, &amp;, *, ., (, )</li><li>Contains no parts of the email address</li></ul></li><li>Enter your first and last names.</li><li>Click <b>Register</b></li></ol>	

Actions	Display
<p>Okta sends an email, subject: <b>Activate Account</b>, to the email address entered in step 3, above.</p> <ul style="list-style-type: none"> <li>The eMedNYID account will not be created until it has been verified.</li> <li>The verification email expires after 7 days. Steps 1 through 6 must be repeated if this happens.</li> <li>If the email is not found in the Inbox, check the Spam or Junk folders.</li> </ul>	
<p>7) In the email, click <a href="#">Activate Account</a></p> <ul style="list-style-type: none"> <li>The eMedNYID has been created.</li> <li>The user may log in to the IAM Portal with this email address and password at any time.</li> <li>The user will be prompted to select at least one Multi Factor Authentication (MFA) method. More details are found in <b>Section 3.2</b>.</li> </ul>	

### 3.2. Set Up at Least One MFA Method

After activating the account, the screen will show a list of valid methods for MFA which are described below.

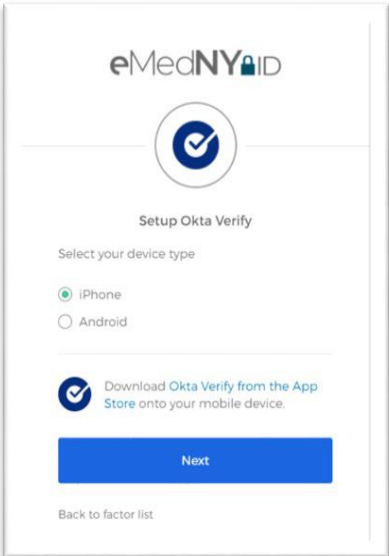

Table 5 - Description of MFA Methods and Requirements

Method	Description	Technical Requirements	Section
<b>Okta Verify</b>	A downloadable app that receives a push notification from the IAM Portal's Okta. The user must enter the code within the time allotted.	A cell phone	3.2.1
<b>Google Authenticator</b>	A downloadable app that receives a push notification from the IAM Portal's Okta. The user must enter the code within the time allotted.	A cell phone	3.2.2
<b>Security Key or Biometric Authenticator</b>	The IAM Portal's Okta will recognize a security key, such as a YubiKey, to authenticate the user.	A security key, biometric authenticator or YubiKey	3.2.3



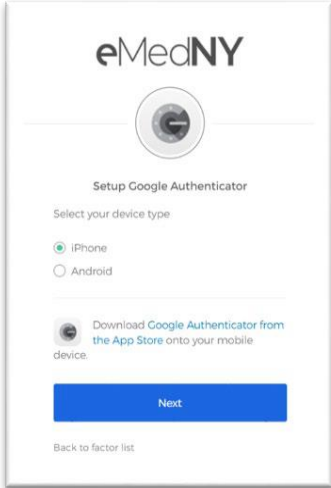
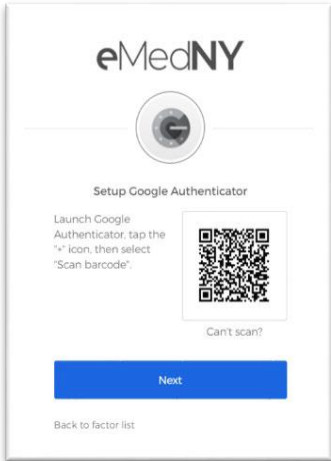
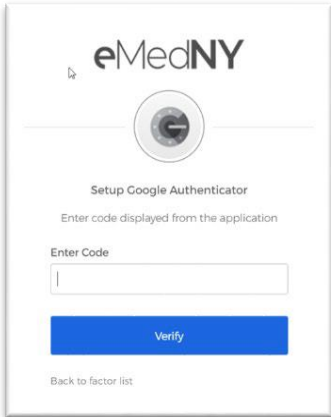
### 3.2.1. Setting Up Okta Verify

Table 6 - How to Set Up Okta Verify

Actions	Display
<p>1) Select the <i>device type</i>. Okta will provide a link to the corresponding App Store.</p> <ul style="list-style-type: none"><li>• If Okta Verify is not on the device, click the link and follow the instructions provided.</li><li>• Once Okta Verify is on the device, click <b>Next</b>.</li></ul>	
<p>2) Follow the instructions on the screen provided by Okta to add the eMedNYID account to the Okta Verify app on your mobile device.</p> <ul style="list-style-type: none"><li>• If scanning is not possible, click <b>Can't Scan?</b> to send an activation link via SMS.</li></ul>	

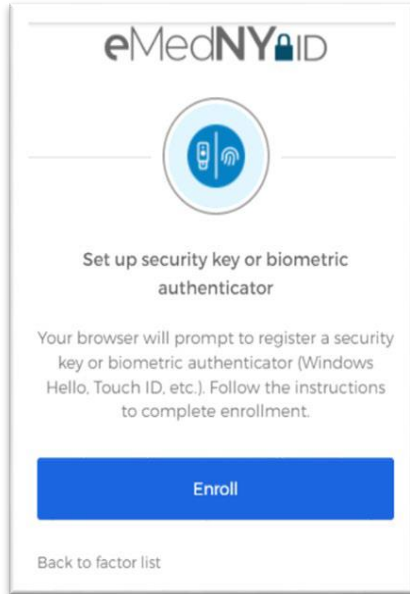
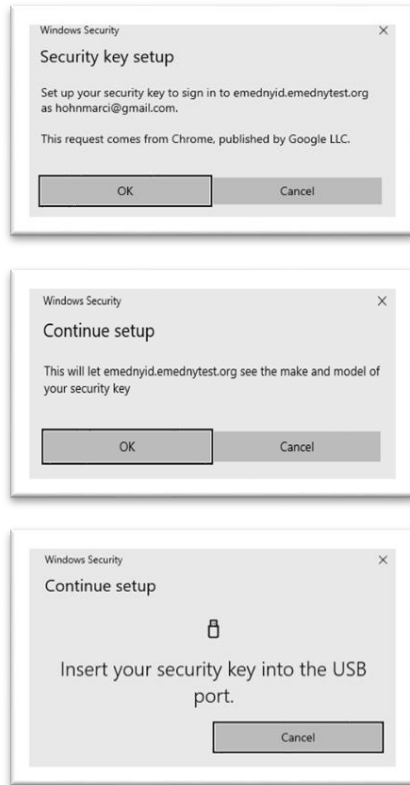
### 3.2.2. Setting Up the Google Authenticator

Table 7 - How to Set Up the Google Authenticator

Actions	Display
<p>1) Select the <i>device type</i>. Okta will provide a link to the corresponding App Store.</p> <ul style="list-style-type: none"><li>• If Google Authenticator is not on the device, click the link and follow the instructions provided.</li><li>• Once Google Authenticator is on the device, click <b>Next</b>.</li></ul>	
<p>2) Follow the instructions on the screen provided by Okta to add the eMedNYID account to the Google Authenticator app on your mobile device.</p> <ul style="list-style-type: none"><li>• If scanning is not possible, click <b>Can't Scan?</b> then enter your Okta account username and the provided security key into the Google Authenticator app on your device.</li></ul> <p>3) Click <b>Next</b>.</p>	
<p>4) Enter the code from the Google Authenticator app.</p> <p>5) Click <b>Verify</b>.</p>	

### 3.2.3. Setting Up the Security Key or Biometric Authenticator

Table 8 - How to Set Up the Security Key or Biometric Authenticator

Actions	Display
1) Click <b>Enroll</b> .	 The screenshot shows the eMedNY ID enrollment screen. At the top is the eMedNY ID logo. Below it is a circular icon containing a security key and a fingerprint. The text reads: "Set up security key or biometric authenticator". Below that, it says: "Your browser will prompt to register a security key or biometric authenticator (Windows Hello, Touch ID, etc.). Follow the instructions to complete enrollment." At the bottom is a large blue button labeled "Enroll". A link "Back to factor list" is at the very bottom.
2) Follow and click <b>OK</b> from the on-screen prompts. 3) Insert your security key into the USB port. <ul style="list-style-type: none"><li>• If already inserted, tap the security key.</li></ul>	 The screenshot shows three sequential Windows Security prompts. The first prompt is titled "Security key setup" and says: "Set up your security key to sign in to emednyid.emednytest.org as hohnmarci@gmail.com. This request comes from Chrome, published by Google LLC." with OK and Cancel buttons. The second prompt is titled "Continue setup" and says: "This will let emednyid.emednytest.org see the make and model of your security key" with OK and Cancel buttons. The third prompt is titled "Continue setup" and says: "Insert your security key into the USB port." with a Cancel button.

### 3.2.4. Last Steps

When all desired MFA methods for the eMedNYID have been set up, click **Finish**.

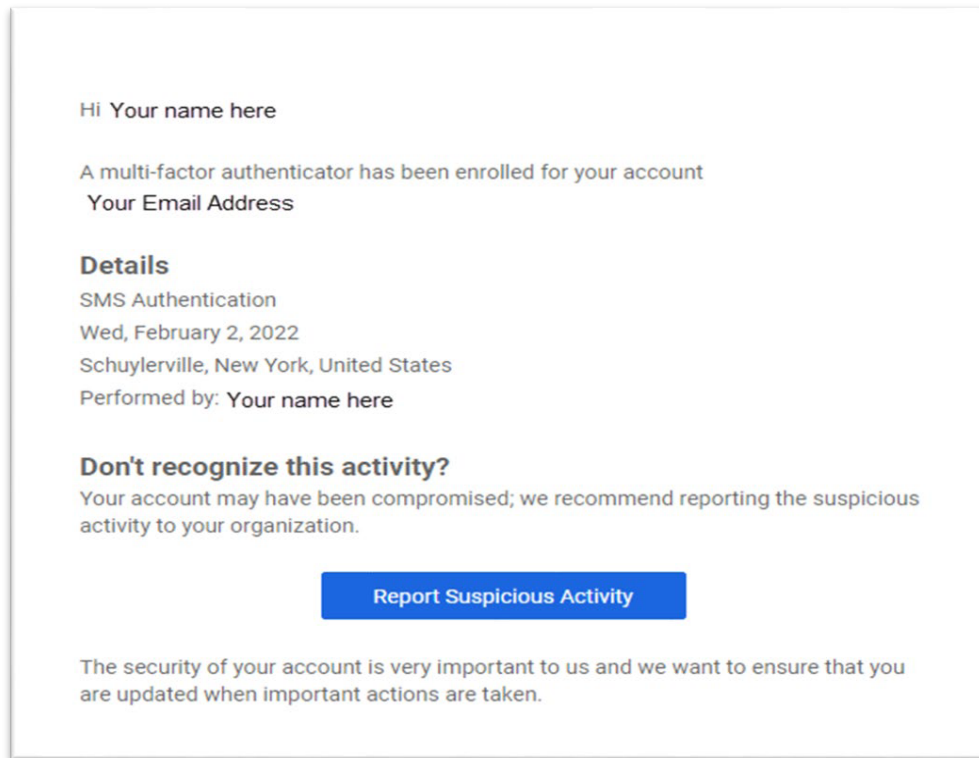


Figure 2 - Email Confirmation of MFA

An email will be sent by Okta for each Authenticator that has been set up for the eMedNYID.

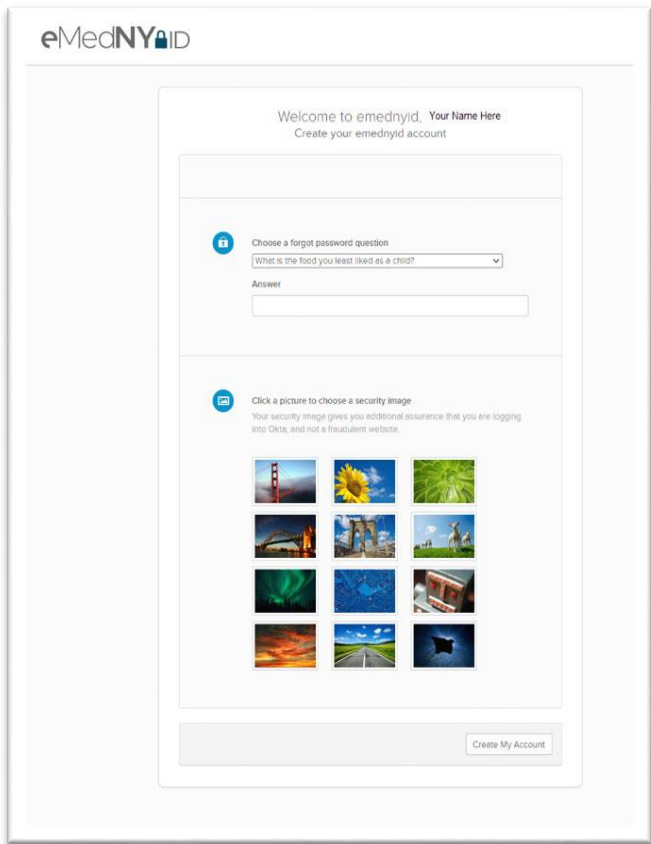
**NOTE:** If emails are received like this, but the activity was not performed by you, report it by clicking on **Report Suspicious Activity**.

If the MFA methods that have been set up need to be changed for any reason, e.g., new device, follow the steps listed in **Section 4.3**, below.

### 3.3. Create a Security Question and Image

The user now has an eMedNYID (their email address), a password, and at least one MFA method. To complete account set up, a forgotten password security question and a security image are required.

Table 9 - How to Select a Security Question and Image

Actions	Display
<ol style="list-style-type: none"><li>1) Choose a security question and provide an answer that is 12 or more characters. Sentences can be used.</li><li>2) Choose a security image. As shown on the screen, the image gives the user an additional assurance that they are logging into their Okta eMedNYID account and not a fraudulent website.</li><li>3) Click <b>Create My Account</b>.</li></ol>	

## 4. The eMedNY Application Dashboard

The eMedNY Application Dashboard is the main hub for accessing all eMedNY provider-related apps.

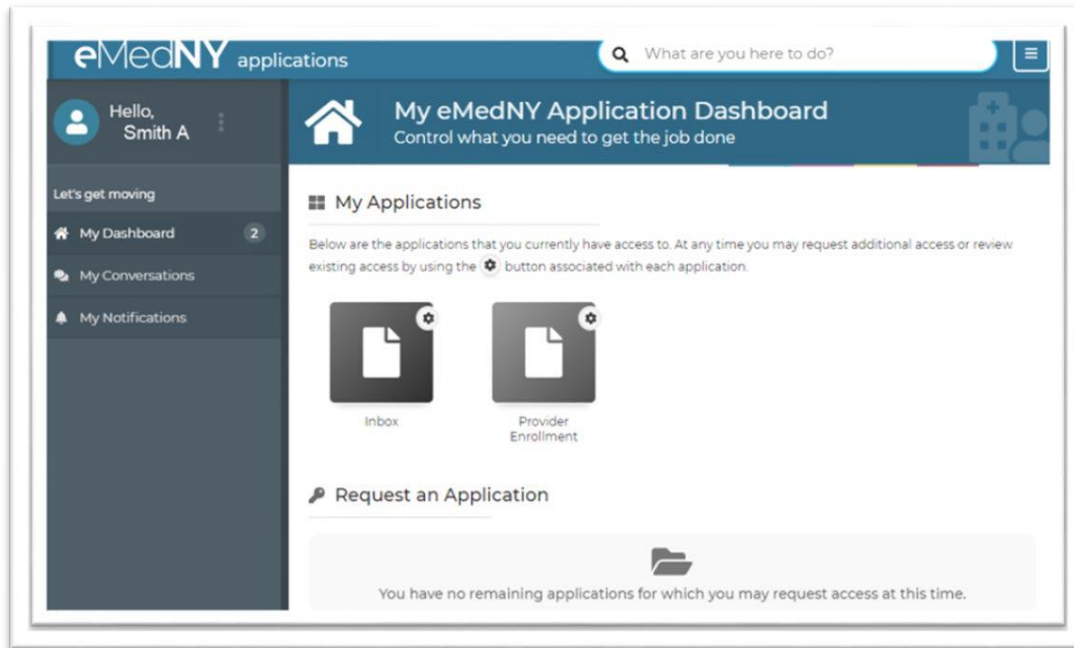


Figure 3 - eMedNY Application Dashboard

This section describes the following functions related to the eMedNY Application Dashboard:

Table 10 - Steps for Using the eMedNY Application Dashboard

Step	Action	Section
1	Log in to the IAM Portal	4.1
2	Open eMedNY applications	4.2
3	Update eMedNYID MFA Methods and Passwords	4.3


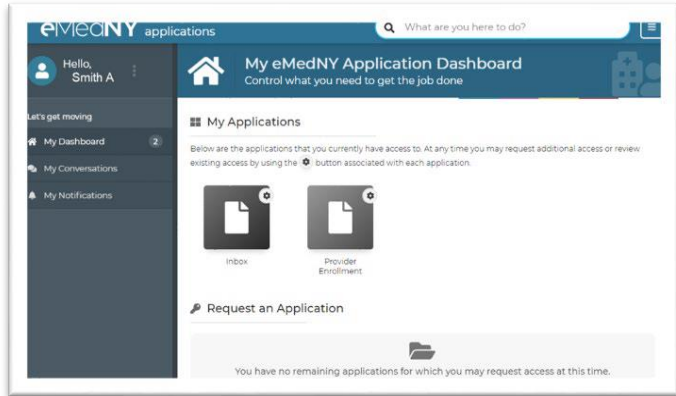


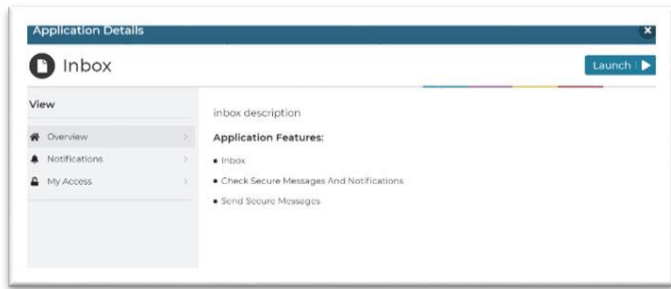
## 4.1. Log into the IAM Portal

If the eMedNYID has been successfully created:

1. Go to <https://iam.emedny.org>.
2. Sign in with the eMedNYID (the email address) and password.
3. Authenticate with the presented MFA method.
  - If more than one MFA method has been linked to the eMedNYID account, click the arrow next to the authenticator icon and select an alternate method.
  - The “Do not challenge me on this device for the next 15 minutes” allows users to log back in within 15 minutes from their last session and bypass the MFA challenge of step 2.

## 4.2. Open an eMedNY App

Table 11 - How to Open App in the IAM Portal


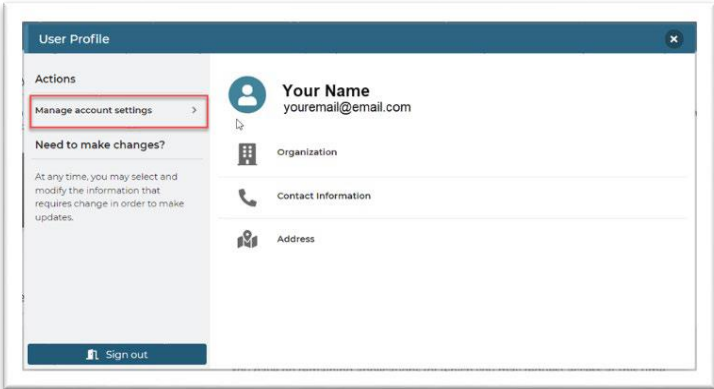
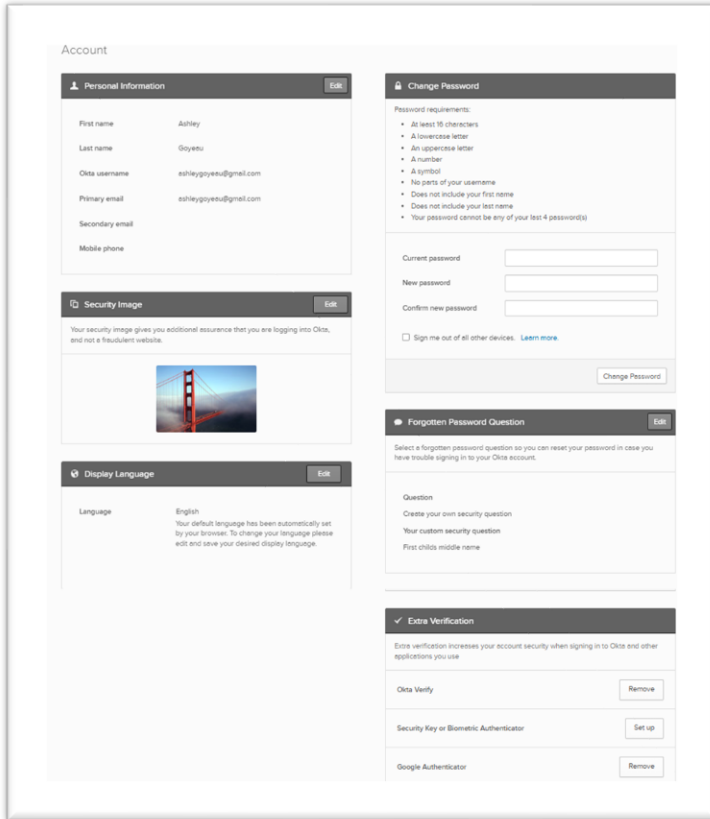
Actions	Display
<p>There are two possible steps to open an app:</p> <p>Option 1)</p> <ul style="list-style-type: none"> <li>Double click the app icon</li> </ul> 	
<p>Option 2)</p> <ul style="list-style-type: none"> <li>Click  to view App Details.</li> <li>Click </li> </ul>	

### 4.3. Update eMedNYID MFA Methods and Password

Users seeking to reset passwords and update their preferred methods for MFA must access the eMedNYID Okta account page via the IAM Portal.

*Note: The eMedNYID Okta Account page does not provide the user access to eMedNY applications. The IAM Portal must be used to access eMedNY app.*

Table 12 - How to Update eMedNYID Okta Account Settings

Actions	Display
<ol style="list-style-type: none"> <li>Click  in the Dashboard to display the User Profile.</li> <li>Click <b>Manage Account Settings</b>.</li> </ol>	 <p>The screenshot shows the 'User Profile' page. On the left, under 'Actions', the 'Manage account settings' link is highlighted with a red box. The right side shows the user's profile information, including 'Your Name', 'youremail@email.com', 'Organization', 'Contact Information', and 'Address'. A 'Sign out' button is at the bottom.</p>
<p><b>Note: This page is <i>not</i> the eMedNY Application Dashboard. To access apps, return to the eMedNY Application Dashboard screen.</b></p> <ol style="list-style-type: none"> <li>From the eMedNYID Okta account page edit the following: <ul style="list-style-type: none"> <li>Personal information <ul style="list-style-type: none"> <li>Secondary email</li> <li>Mobile phone</li> </ul> </li> <li>Forgot Password Text Message</li> <li>Forgot Password Voice Call</li> </ul> </li> </ol> <p>This page may also be used to update</p> <ul style="list-style-type: none"> <li>The user's password (Change Password)</li> <li>MFA Methods linked to the eMedNYID account (Extra Verification) <ul style="list-style-type: none"> <li>At least one MFA Verification option must be set up. If there is only one, Okta will prevent that method from being removed from the profile.</li> <li>For instructions on how to set up each MFA Verification option, refer to sections 3.2.1 thru 3.2.3.</li> </ul> </li> </ul>	 <p>The screenshot shows the 'Account' page with several sections: 'Personal Information' (with fields for First name, Last name, Okta username, Primary email, Secondary email, and Mobile phone), 'Security Image' (with a photo of the Golden Gate Bridge), 'Display Language' (set to English), 'Change Password' (with fields for Current password, New password, and Confirm new password), 'Forgotten Password Question' (with a question field), and 'Extra Verification' (with options for Okta Verify, Security Key or Biometric Authenticator, and Google Authenticator).</p>



## 5. Troubleshooting Log-In Issues

This section contains common issues that maybe be encountered by users when logging in with the eMedNYID.

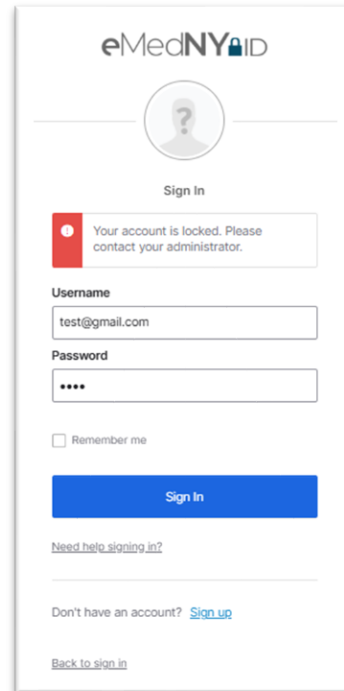
Table 13 - Steps for Troubleshooting Log-In Issues

Step	Action	Section
1	Locked Out	5.1
2	Resetting a Password	5.2

### 5.1. Locked out

When a user gets locked out of their account, the steps below outline what needs to be done.

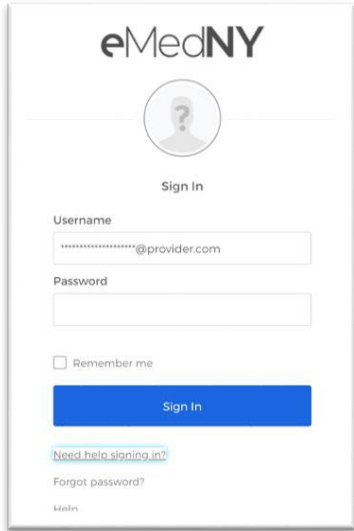
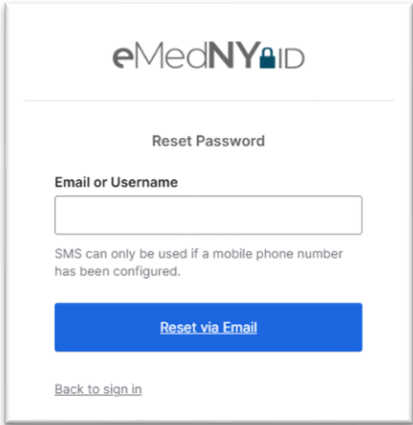
Table 14 - How to Unlock an Account

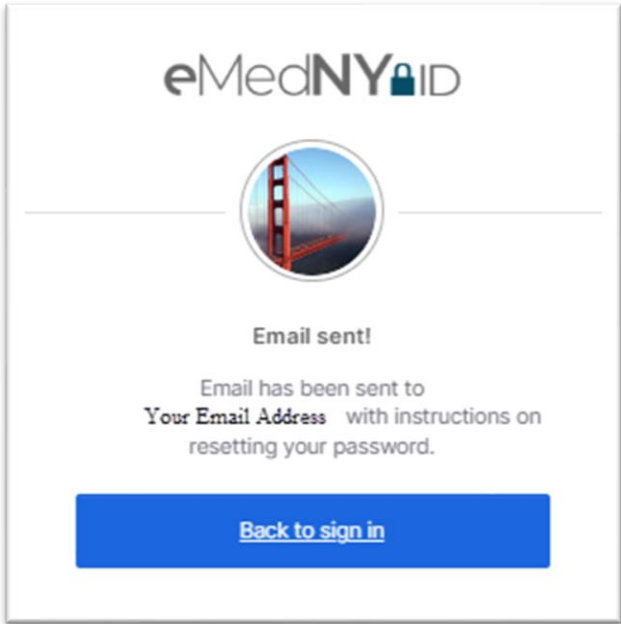
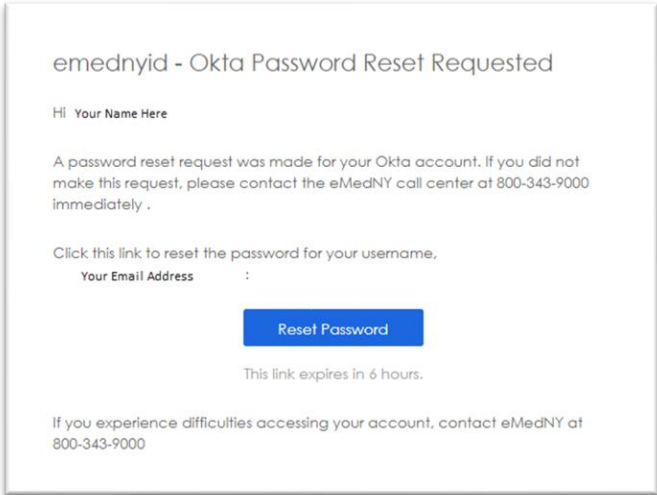
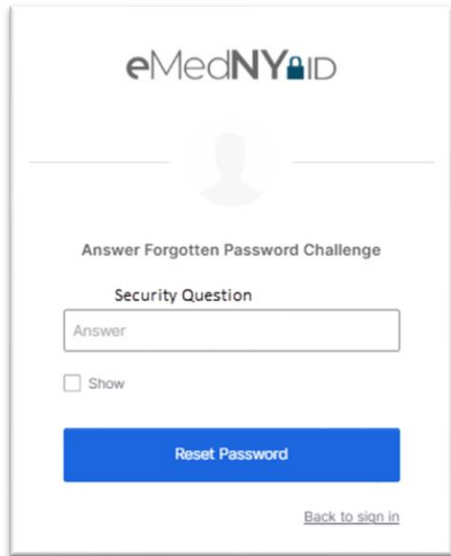
Actions	Display
<ol style="list-style-type: none"><li>1) You will receive the message 'Your account is locked. Please contact your administrator.' After 10 failed password attempts.  When this happens wait 30 minutes for your account to be unlocked.<ul style="list-style-type: none"><li>• You are not required to contact the eMedNY Call Center to unlock your account.</li></ul></li><li>2) Once it's been 30 minutes, and the account has been unlocked you may attempt to log in, or you can refer to section 5.2. for instructions on how to reset your password.</li></ol>	 The screenshot shows the eMedNYID Sign In interface. At the top is the eMedNYID logo. Below it is a circular icon with a question mark. The text 'Sign In' is centered. A red error message box states: 'Your account is locked. Please contact your administrator.' Below this are input fields for 'Username' (containing 'test@gmail.com') and 'Password' (masked with '****'). There is a 'Remember me' checkbox and a blue 'Sign In' button. At the bottom, there are links for 'Need help signing in?', 'Don't have an account? Sign up', and 'Back to sign in'.

## 5.2. Resetting a Password

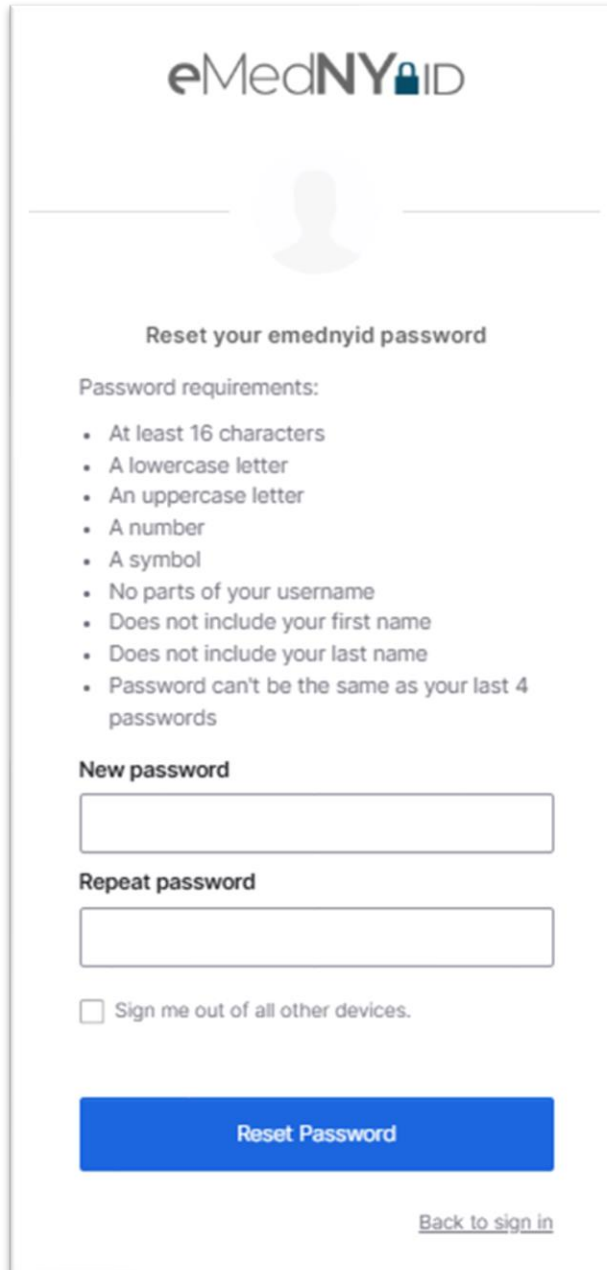
When a user forgets their password the steps below allow the user to reset the password.

Table 15 - How to Reset a Forgotten Password

Actions	Display
<ul style="list-style-type: none"><li>3) Click <b>Need Help Signing in?</b></li><li>4) Click <b>Forgot Password</b></li></ul>	 The image shows the eMedNY Sign In page. At the top is the eMedNY logo. Below it is a circular icon with a question mark. The text "Sign In" is centered. There are two input fields: "Username" with a placeholder "*****@provider.com" and "Password". Below the password field is a checkbox labeled "Remember me". A blue "Sign In" button is at the bottom. Below the button are two links: "Need help signing in?" and "Forgot password?". At the very bottom is a small "Mobile" link.
<ul style="list-style-type: none"><li>3) Enter the eMedNYID account (the user's email address)</li><li>4) Select <b>Reset via Email</b></li></ul>	 The image shows the eMedNYID Reset Password page. At the top is the eMedNYID logo. Below it is the text "Reset Password". There is an input field labeled "Email or Username". Below the field is a note: "SMS can only be used if a mobile phone number has been configured." A blue "Reset via Email" button is at the bottom. Below the button is a link "Back to sign in".

<p>5) You will be prompted that an email was sent to your email address with instructions on how to reset your password</p>	
<p>6) An email will be sent by Okta, which will indicate that a password reset request was made. Select <b>Reset Password</b></p> <ul style="list-style-type: none"> <li>This Link will expire in 6 hours.</li> <li>If you did not submit the request, Contact the eMedNY Call Center Immediately at 800-343-9000</li> </ul>	
<p>7) You will need to answer your security question in order to reset your password. Enter the answer to the security question and select <b>Reset Password</b>.</p> <ul style="list-style-type: none"> <li>If you do not remember the answer to the security question, contact the eMedNY Call Center for assistance at 800-343-9000.</li> </ul>	

- 8) Once the security question is answered correctly, you will be able to select a New Password. Enter a new password that follows the guidelines outlined.
- 9) After you enter a new password, repeat the password and select **Reset Password**.
  - You have the option of selecting **Sign me out of all other devices**.
  - Once you enter a valid password, it will prompt you to verify your account with one of the MFA Methods you enrolled in.



The screenshot shows the 'Reset your emednyid password' page. At the top is the eMedNYID logo. Below it is a placeholder for a profile picture. The main heading is 'Reset your emednyid password'. Underneath, 'Password requirements:' are listed with bullet points: At least 16 characters, A lowercase letter, An uppercase letter, A number, A symbol, No parts of your username, Does not include your first name, Does not include your last name, and Password can't be the same as your last 4 passwords. There are two input fields: 'New password' and 'Repeat password'. Below these is a checkbox labeled 'Sign me out of all other devices.' At the bottom is a large blue 'Reset Password' button and a link that says 'Back to sign in'.

eMedNYID

Reset your emednyid password

Password requirements:

- At least 16 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Password can't be the same as your last 4 passwords

New password

Repeat password

☐ Sign me out of all other devices.

Reset Password

[Back to sign in](#)