Kentucky Health Information Exchange (KHIE)

ePartnerViewer Login:

Kentucky Online Gateway (KOG) and Okta Verify Multi-Factor Authentication (MFA)

User Guide

September 2022

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Illustrations

Illustrations contained herein are intended for example purposes only. The patients and providers depicted in these examples are fictitious. Any similarity to actual patients or providers is purely coincidental. Screenshots contained in this document may differ from the current version of the HealthInteractive asset.

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Table of Contents

1   Introduction

Overview

The Kentucky Health Information Exchange (KHIE) utilizes the Kentucky Online Gateway (KOG) to authenticate if an individual has access to KHIE's ePartnerViewer portal. To access the ePartnerViewer, Authorized Users must establish a KOG account. This user guide covers how to register for a Kentucky Online Gateway (KOG) account. This user guide also includes updated guidance on how to complete Multi-Factor Authentication (MFA) to access KHIE's ePartnerViewer portal. Additionally, this guide covers how to properly login and log out of the ePartnerViewer portal.

All examples and screenshots used in this guide are simulated with mock data; no Protected Health Information (PHI) is present.

Please Note: All screenshots shown throughout this document reflect how Users would interact with the ePartnerViewer while using a desktop or tablet device. While core functionality remains the same across multiple devices, interface components may vary in presentation.

Supported Web Browsers

Users must access the ePartnerViewer with a supported web browser. The ePartnerViewer is configured to support the following modern browsers on desktop, tablet, and mobile devices:

Desktop Browser Version	Mobile Browser Version
Microsoft Internet Explorer	
Not supported	Not supported
Microsoft Edge	
Version 44+	Version 40+
Google Chrome	
Version 70+	Version 70+
Mozilla Firefox	
Version 48+	Version 48+
Apple Safari	
Version 9+	iOS 11+

Please Note: The ePartnerViewer does **not** support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

Mobile Device Considerations

The ePartnerViewer is based on responsive design. This means it renders in the best format based on the user's device size. Responsive design applies to mobile, tablet, and desktop devices. Tablet devices in landscape display mode are considered desktop.

Accessing the ePartnerViewer

To access the ePartnerViewer, users must meet the following specifications:

1. Users must be part of an organization with a signed Participation Agreement with KHIE.

2. Users are required to have a Kentucky Online Gateway (KOG) account.

3. Users are required to complete Multi-Factor Authentication (MFA).

> **Please Note:** If you have an existing Kentucky Online Gateway (KOG) Account, please skip *Section 2 KOG Registration for New Users* and start at Section 3 *Logging into KOG: New KOG Screens*.

2   KOG Registration for New Users

Create a KOG Account

1. When provisioned with a role in the ePartnerViewer, you will receive an invitation email to register for the Kentucky Online Gateway (KOG).

2. Click the ***Click here to complete the process* hyperlink** located in the Invitation email.


> **Please Note:** This link is active for seven days. The registration link is only valid for a one-time use. If you click the link and do <u>not</u> complete the registration process, a new link must be sent.
>
> If the link expires, the KHIE Organization Administrator must send another invitation to create a Kentucky Online Gateway (KOG) account.

3. The new **Kentucky Online Gateway (KOG) Sign-In** screen displays. If you do not have an existing KOG account, click **Create New Account**.
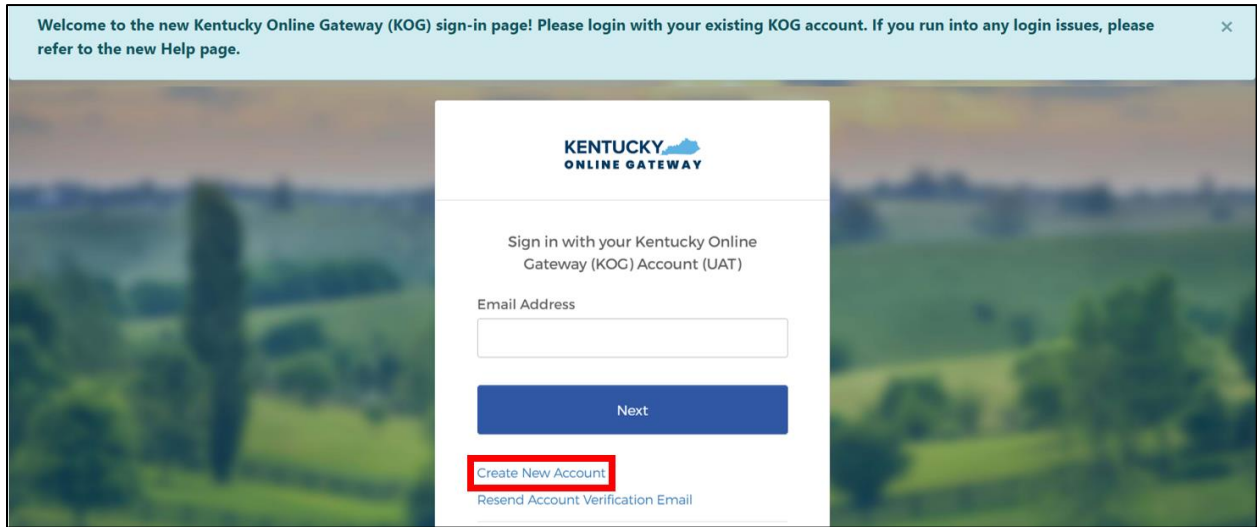
> **Please Note:** If you already have an existing KOG account with the **same email address** from which you received the invitation to enroll, do **not** create a new account. Log into KOG using your existing credentials.

4. Enter the Registration Information on the **Kentucky Online Gateway Profile** screen. Mandatory fields are marked with asterisks (*).
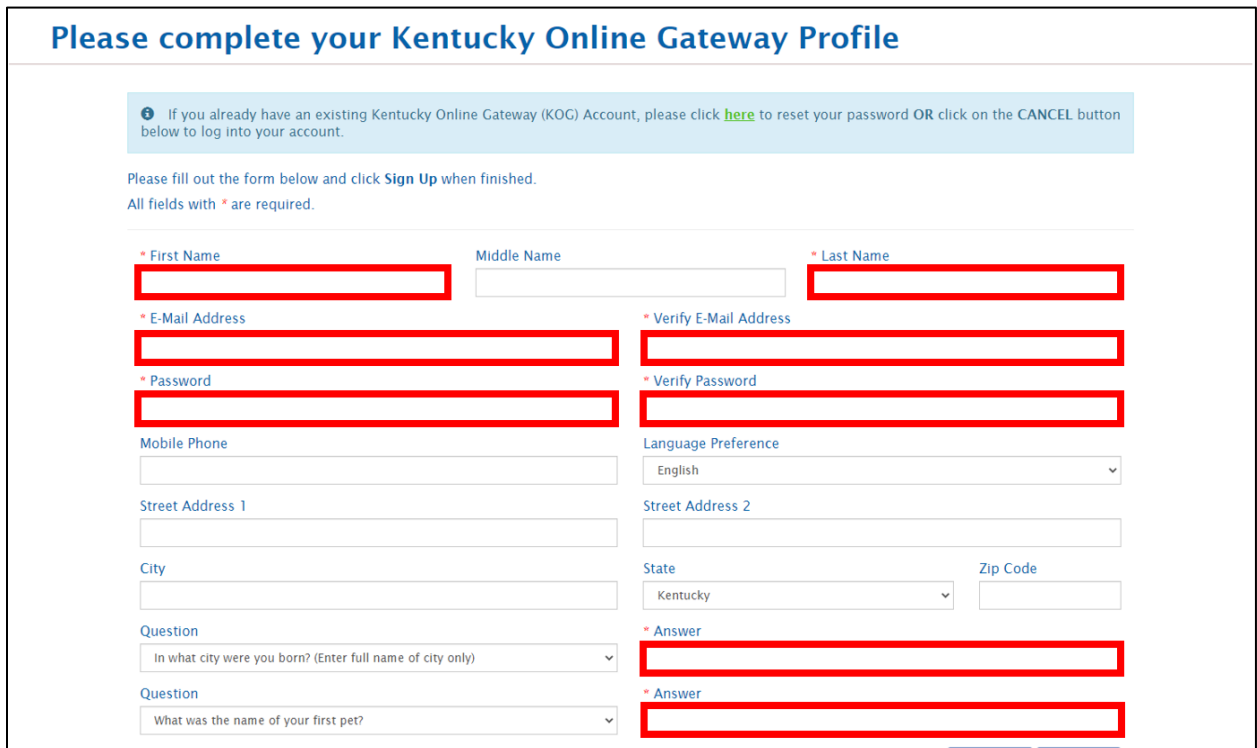
5. Enter your **First Name** and **Last Name** in the appropriate fields.

6. If applicable, enter your **Middle Name**.

7. Enter your **Email Address**.

8. Confirm your **Email Address** in the *Verify Email Address* field.

Please Note: You MUST register using the same email address from which you received the invitation to enroll.

9. Enter your **Password**.

10. Confirm your **Password** in the *Verify Password* field.

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11. You have the option to register a phone number to associate with your KOG account. To register a phone number to your KOG account, enter your **Mobile Phone Number**.

12. You have the option to select your **Language Preference** from the dropdown menu.

13. If applicable, enter your **Street Address**, **City**, **State**, and **Zip Code**.

14. Select your preferred **Security Question** from the *Question 1* dropdown menu.

15. Enter your **Answer** to Security Question 1 in the *Answer* field.

16. Select your preferred **Security Question** from the *Question 2* dropdown menu.

17. Enter your **Answer** to Security Question 2 in the *Answer* field.

18. After completing the mandatory fields, click **Sign Up**.

19. After clicking **Sign Up**, you will be directed to a screen displaying the following message:

   Your account has been requested and is pending email verification. Please check your email and click on the link provided to verify your account.

20. You must check your email to complete the KOG Account Validation process.
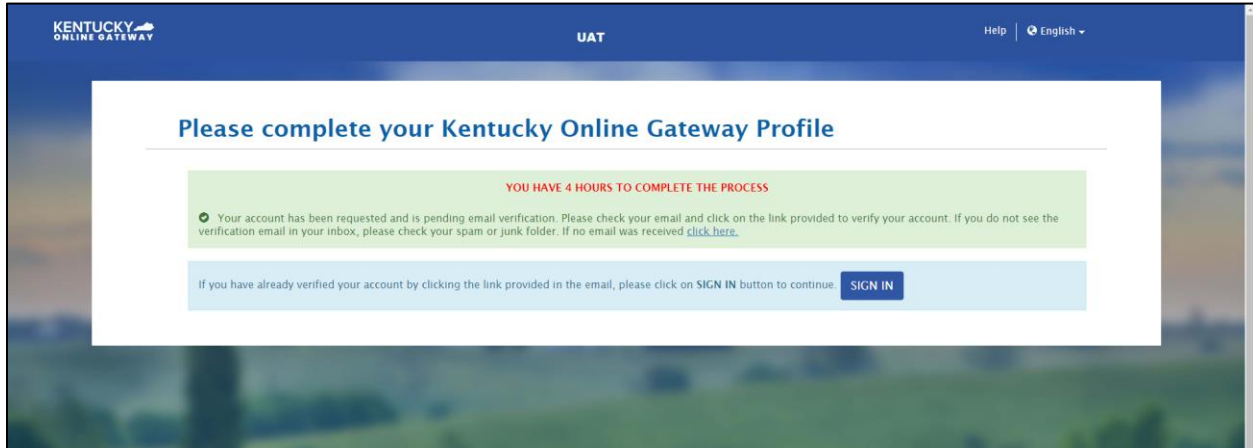
> **Please Note:** If the verification email is not in the inbox, check the *Junk* and *Spam* folders.

KOG Account Validation

21. You will receive an email at the email address you provided when creating the account. This email is titled *Account Verification* from KOG_DoNotReply@ky.gov.

22. Click the **hyperlink** in the email to proceed to the **Validate New Account** screen.
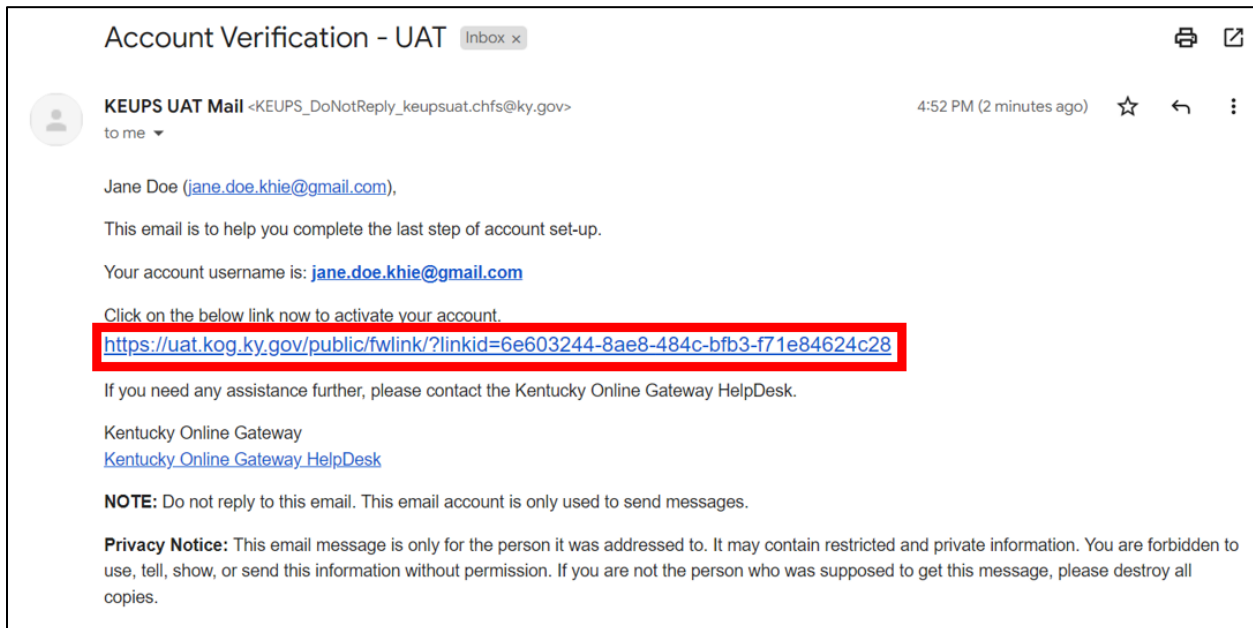
23. The **Validate New Account** screen displays. You must click **Continue to Sign in** to navigate to the **KOG Login** screen and complete the account creation process.
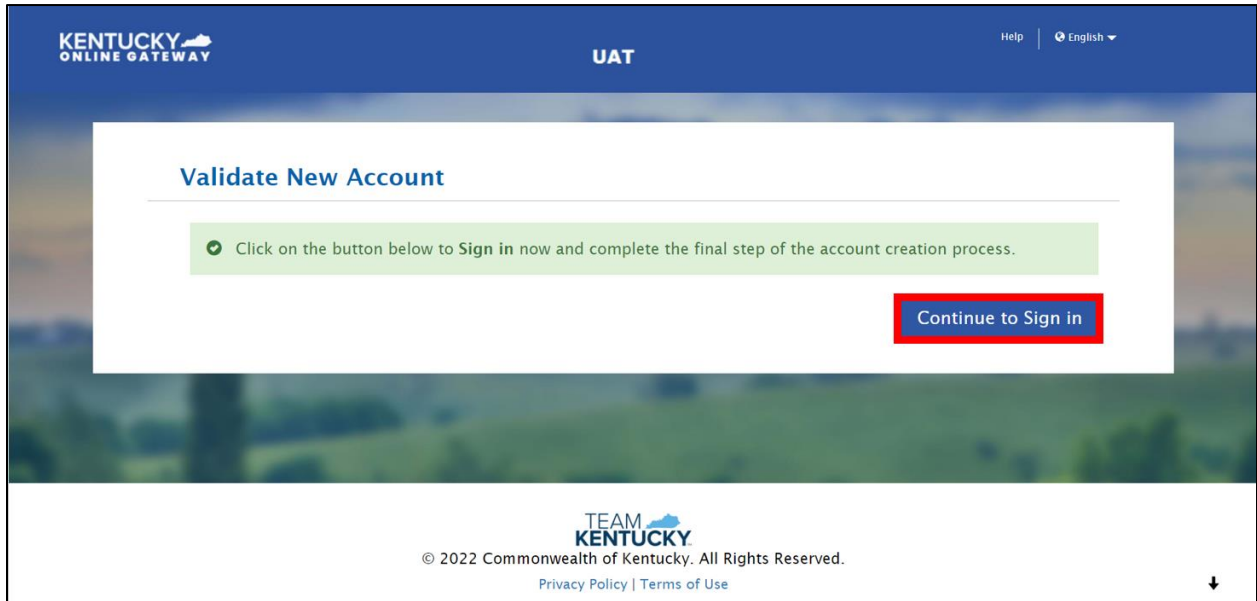
24. The new **KOG Login** screen displays. Enter your **Email Address**. Click **Next**.
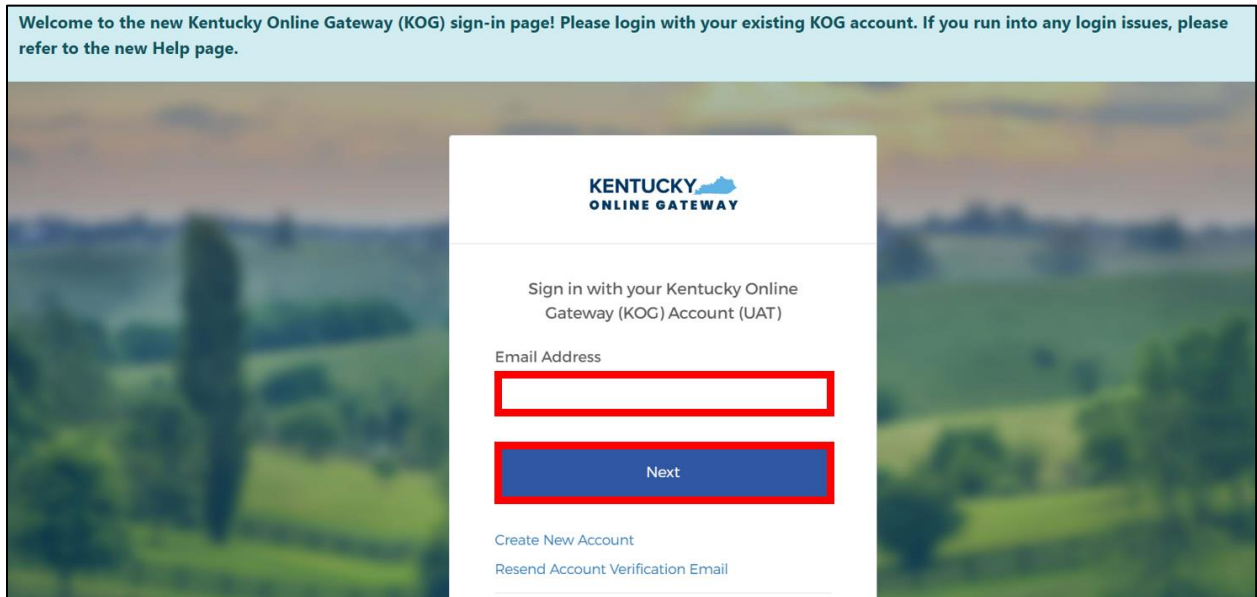
Please Note: You must enter the email address provided when you created your KOG account.

25. The **Verify with your password** screen displays. Enter your **Password**. Click **Verify**.
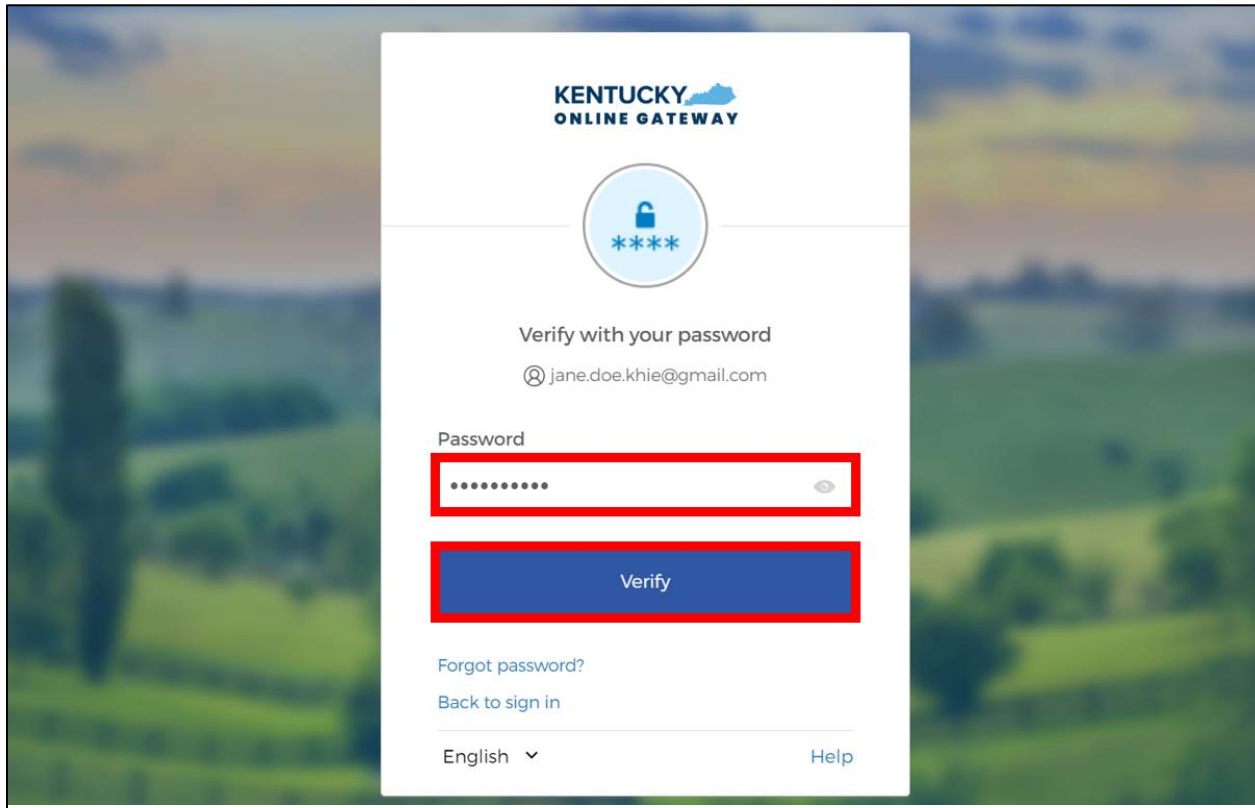
Please Note: You must enter the password provided when you created your KOG account.

If KOG determines that no other verification steps are needed, then authentication is considered complete, and you will be automatically navigated to the ePartnerViewer.

26. After logging in, you have the option to register as an organ donor.

- To register as an organ donor, click **Yes, Register Now**.

- If you do not want to register as an organ donor, click **Remind me later** to proceed.
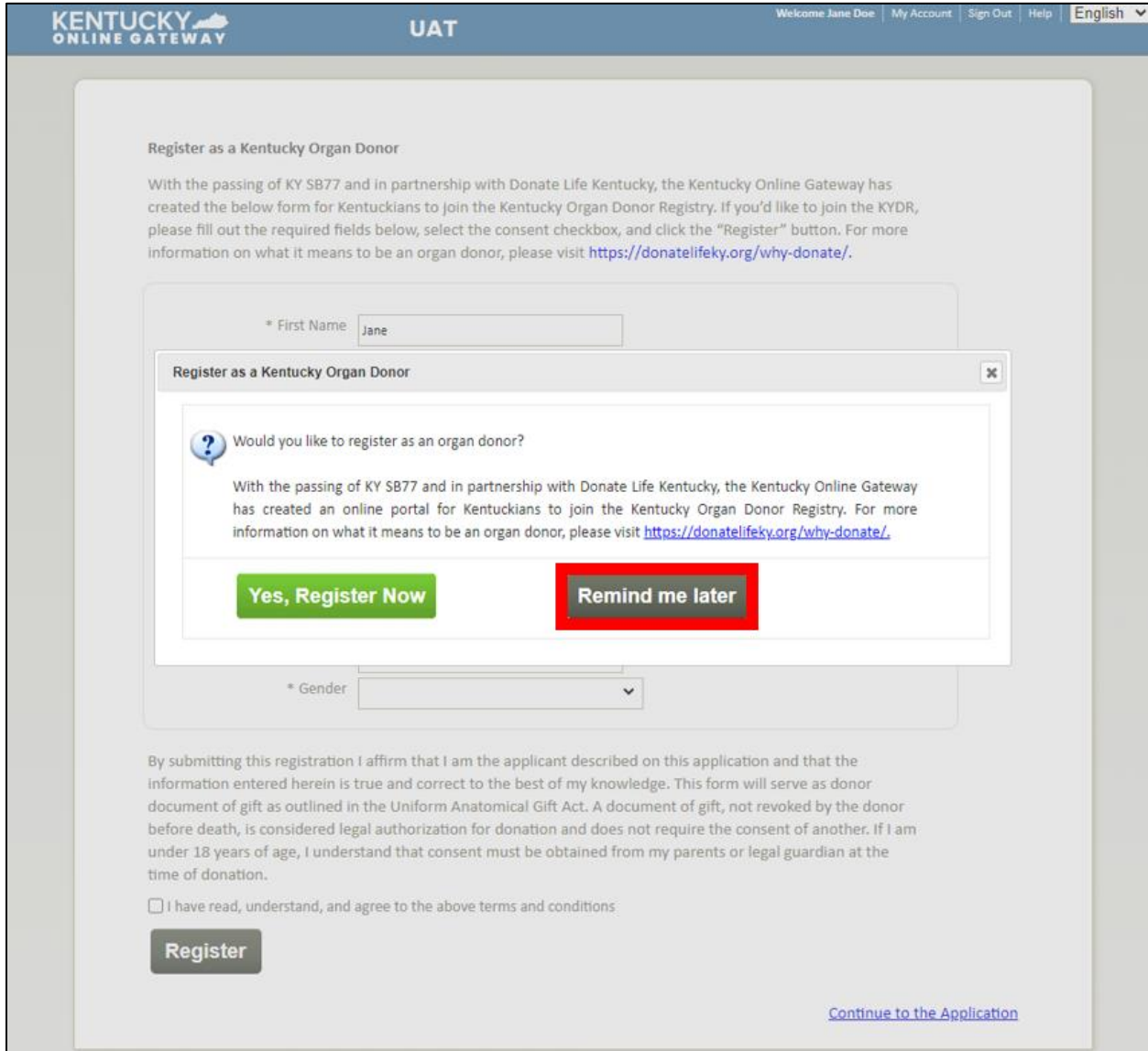
Please Note: If you are logging for the first time, you will be automatically navigated to the **Set Up Security Methods** screen to complete Multi-Factor Authentication (MFA) for ePartnerViewer access.

3 Multi-Factor Authentication (First Time Login)

After logging in for the first time, you are asked to set up a security method to complete Multi-Factor Authentication (MFA). Multi-factor Authentication (MFA) is an authentication method that requires the user to provide two or more verification factors to gain access to an application.

As part of the system upgrade, KOG has added a _new_ security method called **Okta Verify**. Okta Verify is a mobile/tablet-based app that can be used to complete MFA. If you are presented with multiple security method options, KOG **highly recommends** that you choose to set up **Okta Verify** as your primary security method to complete MFA for a more seamless user experience.
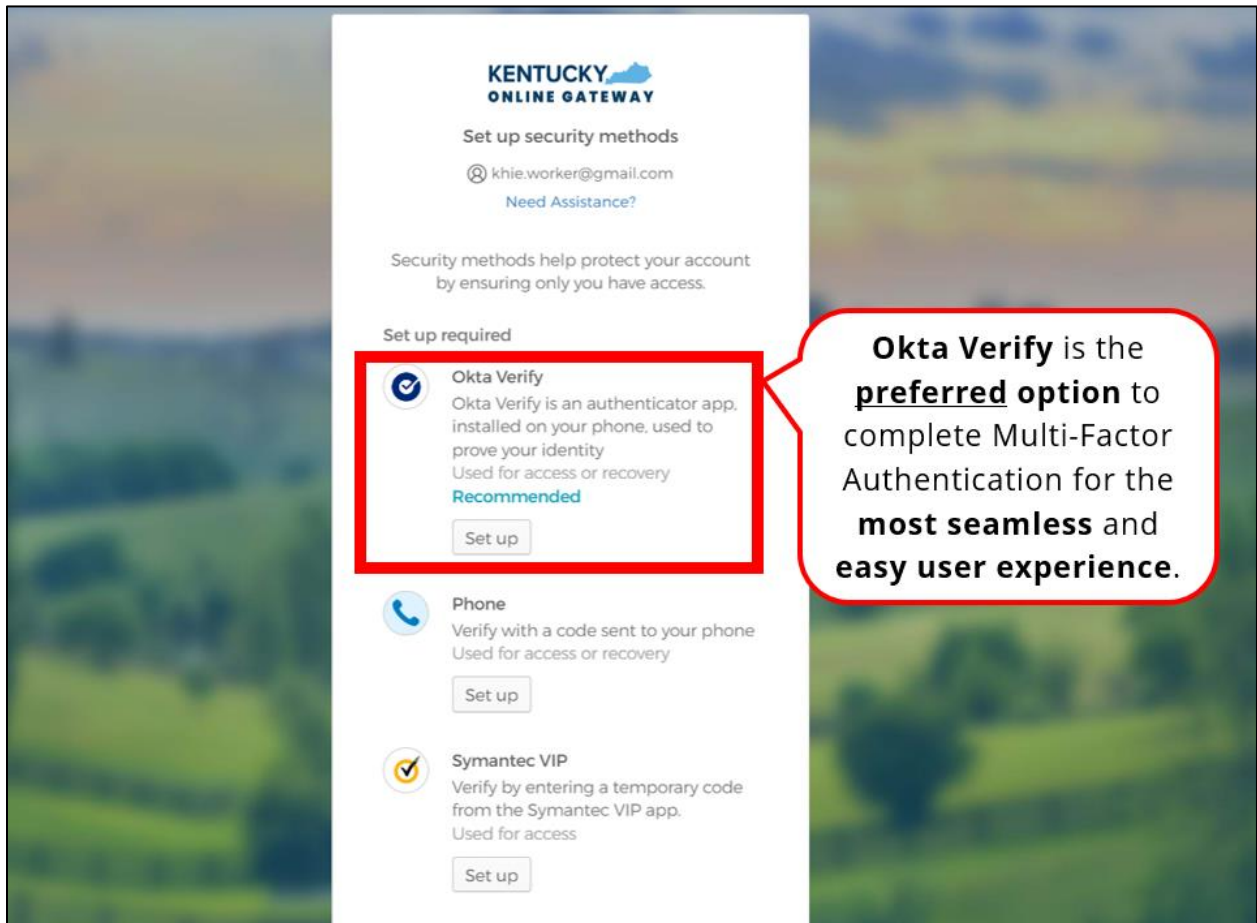
Please Note: When logging in for the _first time_, the **Set up security methods** screen displays different Multi-Factor Authentication options based on the level of access of each user role.
Thus, the **Set up security methods** screen may have slight differences from the above screenshot based on your user role access level.

Okta Verify Enrollment (First Time Login)

To set up Okta Verify when logging in for the first time, complete the following steps:

1. After entering your email address and password on the new **KOG Login** screens, you are navigated to the **Set Up Security Methods** screen. Click the Okta Verify **Set up** button.
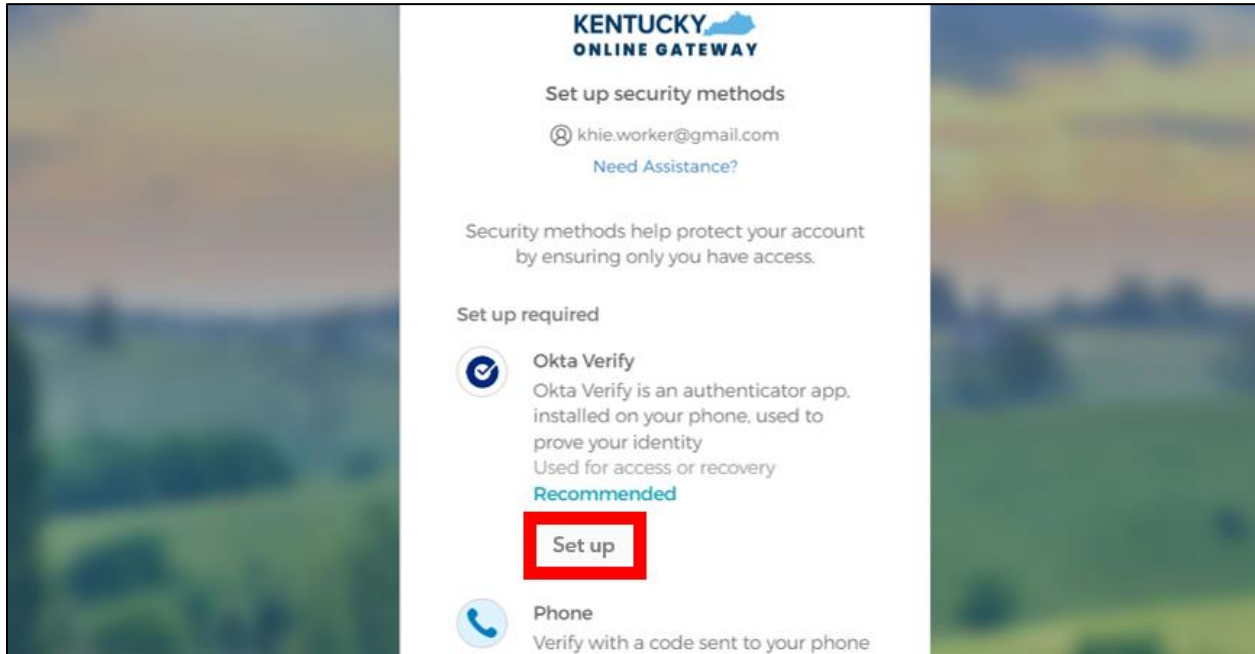
2. The **Set Up Okta Verify** screen displays. You must complete the 3 steps listed on the screen to enroll into Okta Verify. You must first download the Okta Verify app on your mobile device from the App Store (iPhone and iPad) or Google Play (Android Devices).
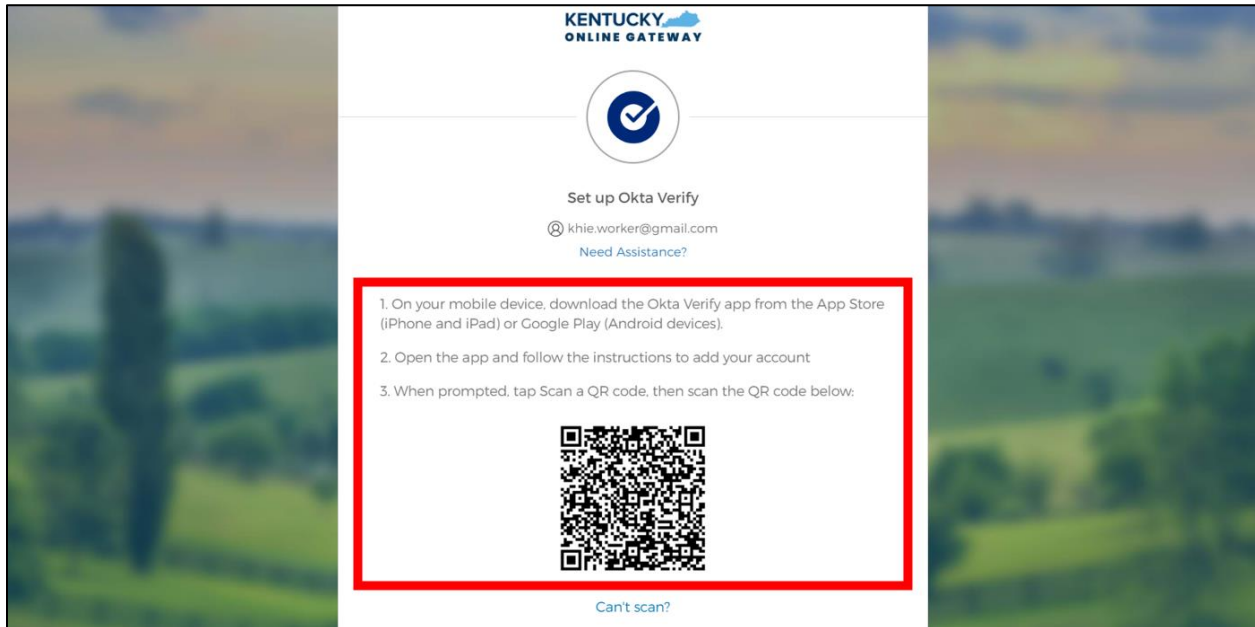
> **Please Note:** The following screenshots were taken using an iPhone mobile device. If using an Android mobile device or tablet, the screens may differ slightly.
>
> You must complete the steps in the following screenshots to download, install, and open the Okta Verify app on your mobile device or tablet.

3. To download and set up the Okta Verify app on your mobile device, complete the following steps:

- _Step 1_: Navigate to the **App Store** and enter **Okta Verify** in the _Search Bar_ at the top of the **App Store**. Click **Get** located on the right side of the Okta Verify app.
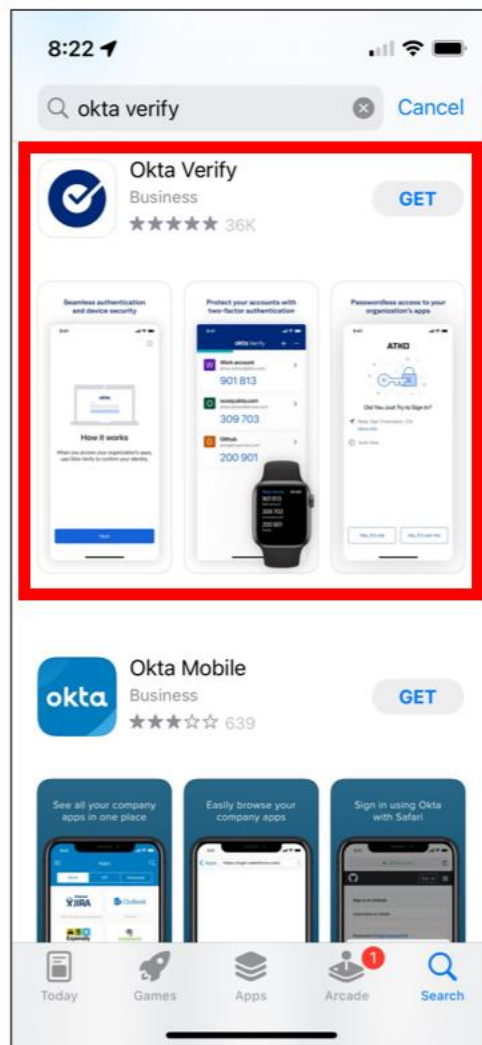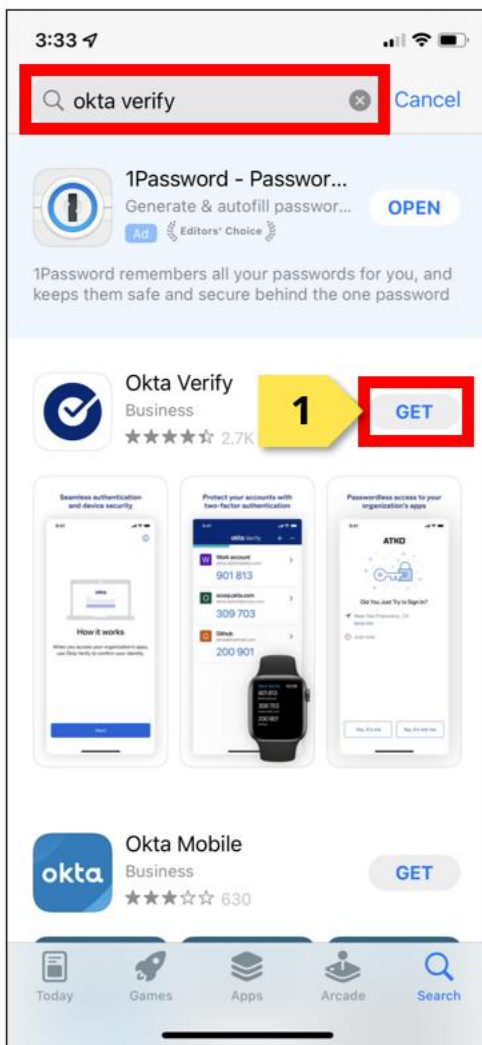
> **Please Note:** There are two different Okta apps in the App Store (iPhone and iPad) or Google Play (Android devices). Users should only download the **Okta Verify** app.

- *Step 2*: Once downloaded, click the **Okta Verify app**.

- *Step 3*: On the **Welcome to Okta Verify** screen, click **Get Started**.

- *Step 4*: On the **How it works** screen, click **Next**.
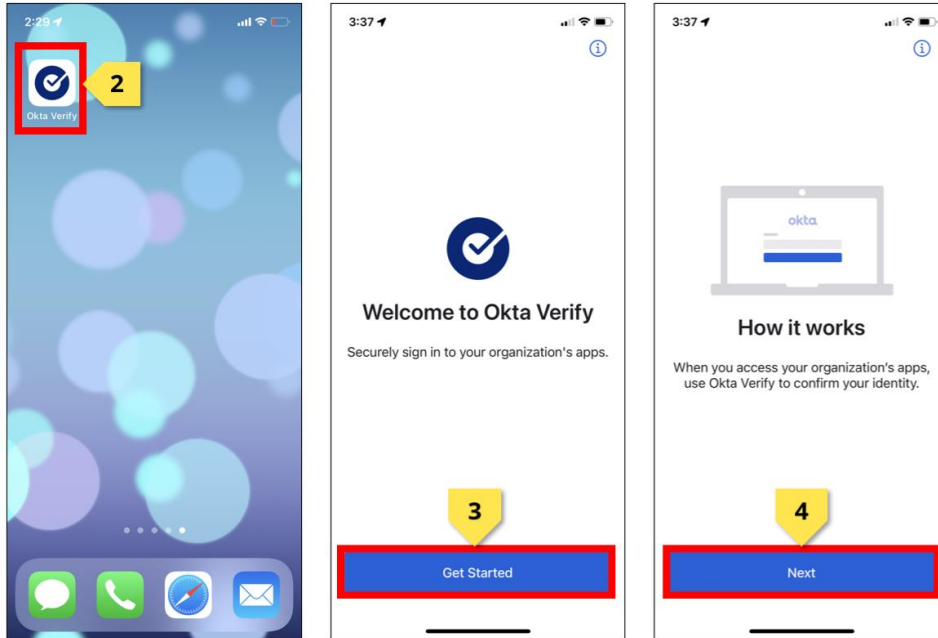
- *Step 5*: On the **Ways to Verify** screen, click **Add Account**.

- *Step 6*: On the **Choose Account Type** screen, select **Organization**.

- *Step 7*: On the **Do You Have Your QR Code?** screen, click **Yes, Ready to Scan** to open the mobile device camera.
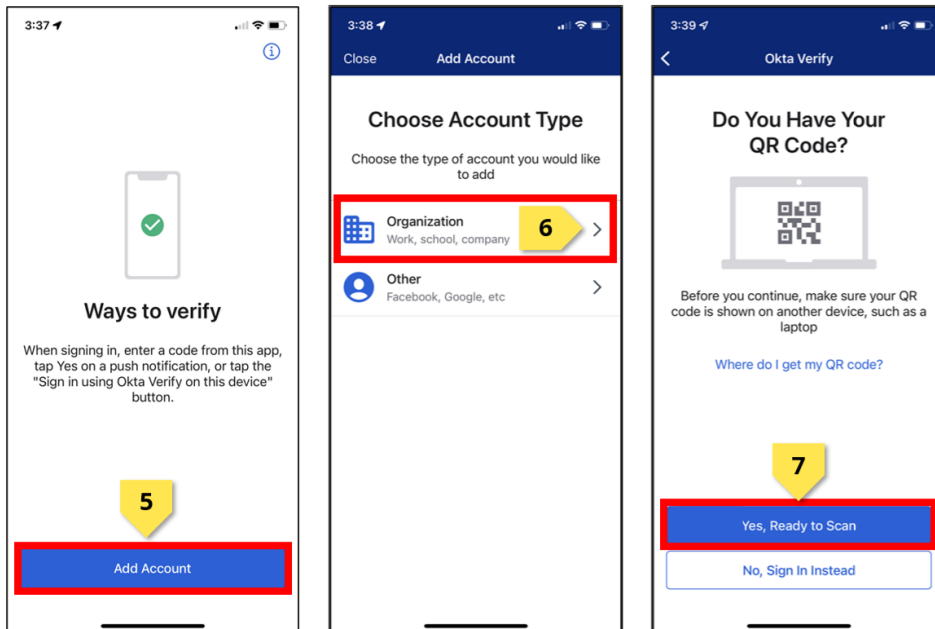
- *Step 8*: On the **Set Up Okta Verify** screen on your computer, use the camera feature to position the QR code within the highlighted frame.
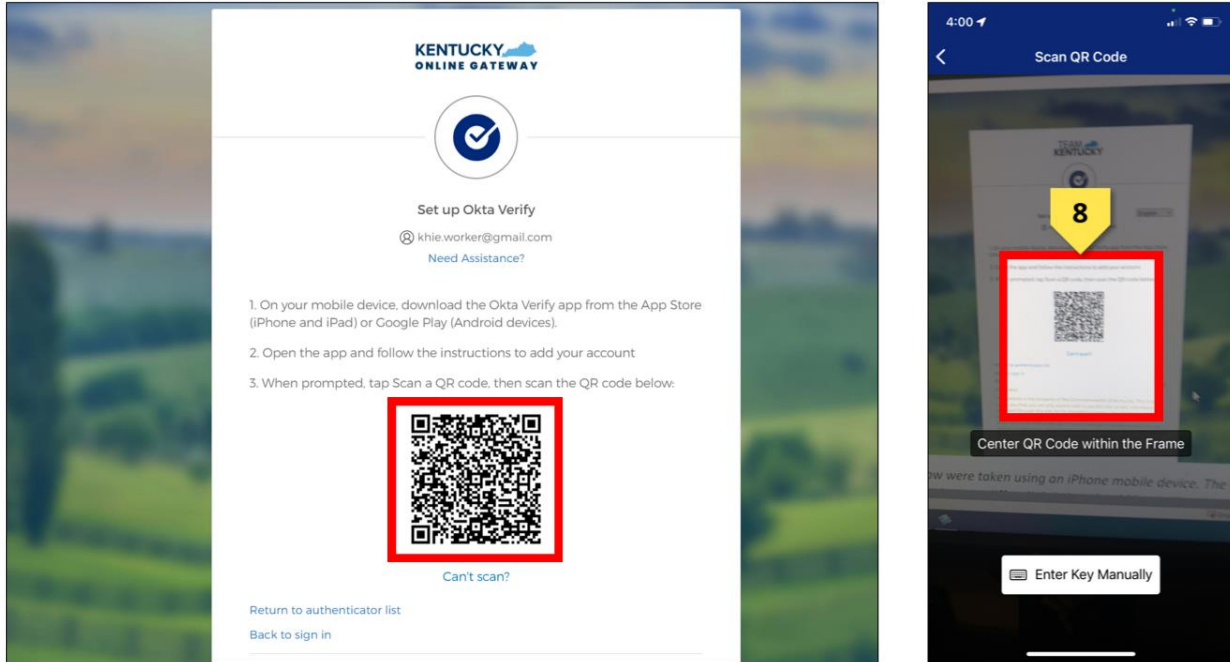
4. If your mobile device successfully scans the QR code, KOG will recognize that the Okta Verify MFA enrollment is complete on the **Set up security methods** screen. If no other authentication factors are available to enroll, you will be redirected to your application.
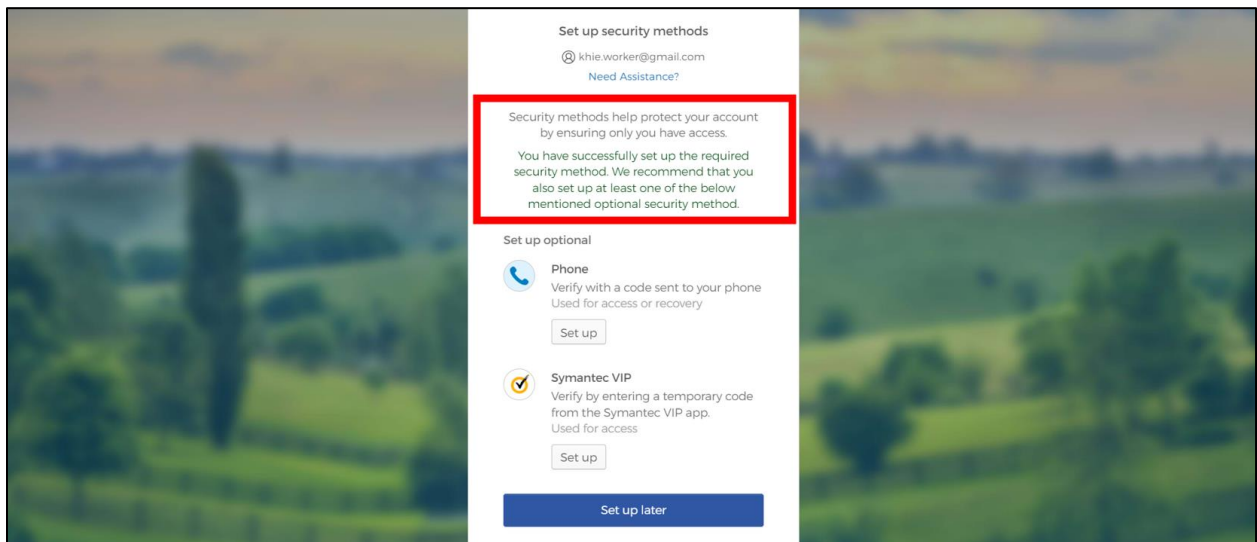
Please Note: If there are other available options to enroll in for Multi-Factor Authentication, KOG recommends that you also set up **Phone Authentication** as an additional security method. This will allow you to add or remove additional security methods in the future. For guidance on setting up Phone MFA, please review the *Phone Authentication* sub-section within *Section 7 Appendix*.

5. To skip enrolling for another MFA option and navigate to the ePartnerViewer, click **Set up later**.
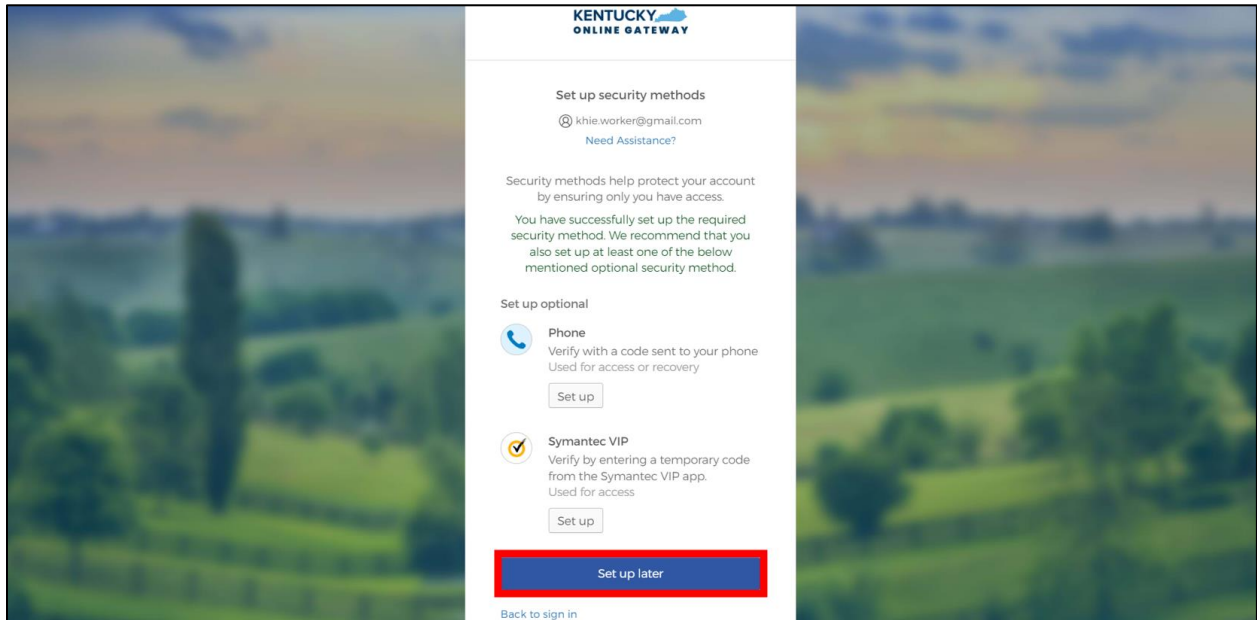
> **Please Note:** If there are no other available options to enroll for Multi-Factor Authentication, or if you clicked **Set up later** on the Set up security methods screen, you will be navigated to the **Terms and Conditions of Use** screen before accessing the ePartnerViewer.
>
> For more information, please review the *Terms and Conditions of Use* sub-section within Section 4 *Logging into the ePartnerViewer*.
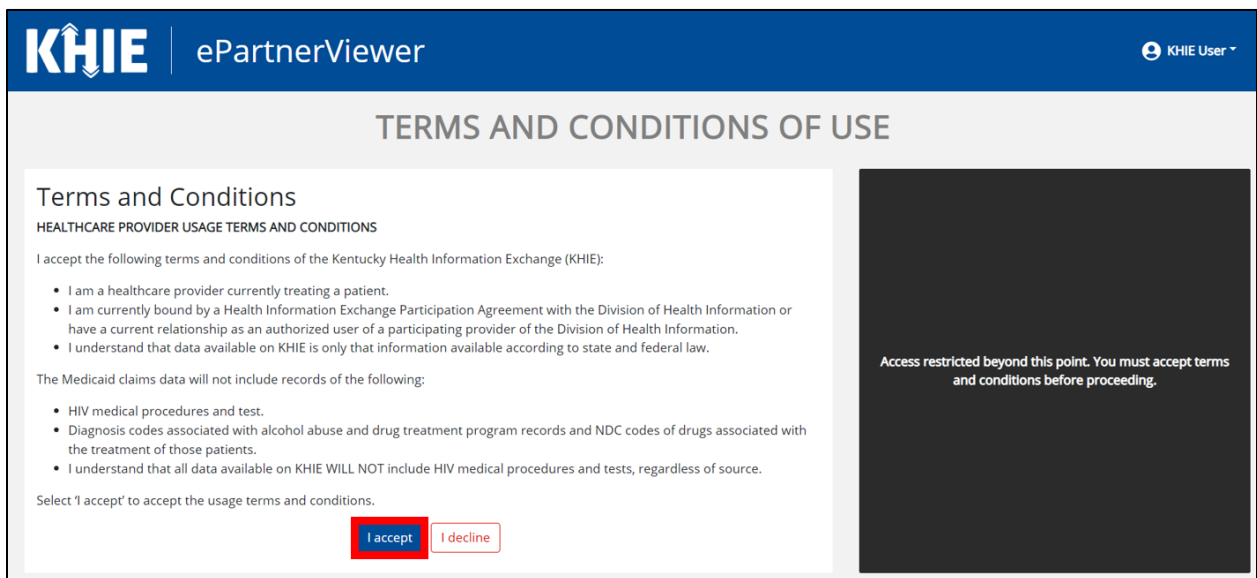
4 Logging into ePartnerViewer

When attempting to access any KOG-supported application, you will be automatically navigated to the new **KOG Login** screen to sign into you existing KOG account. These steps provide updated guidance on how to access the ePartnerViewer from KOG.

1. Before accessing the ePartnerViewer, you must log out from any active KOG session or ePartnerViewer session and close the browser window.

2. To navigate to the ePartnerViewer, enter the following **ePartnerViewer URL** in a supported browser window: **https://epartnerviewer.khie.ky.gov**
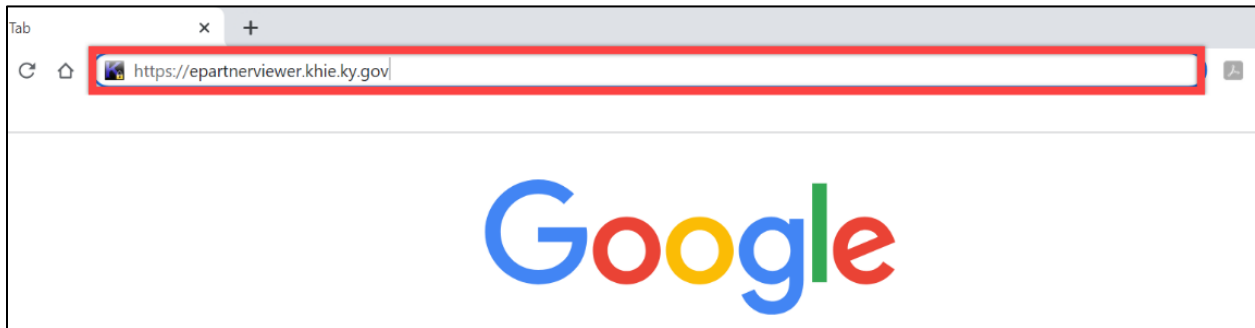
Please Note: The ePartnerViewer does **not** support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

3. The new **KOG Login** screen displays. Enter your **Email Address**. Click **Next**.
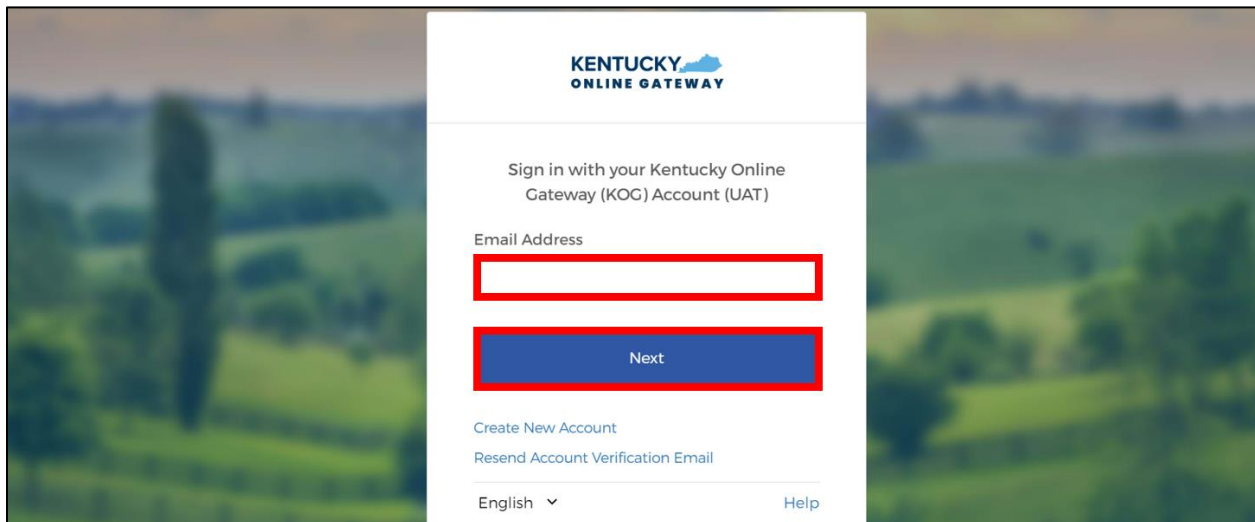
Please Note: You must enter the email address provided when you created your KOG account.

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4. The **Verify with your password** screen displays. Enter your **Password**. Click **Verify** to proceed to the **Verify it's you with a security method** screen.
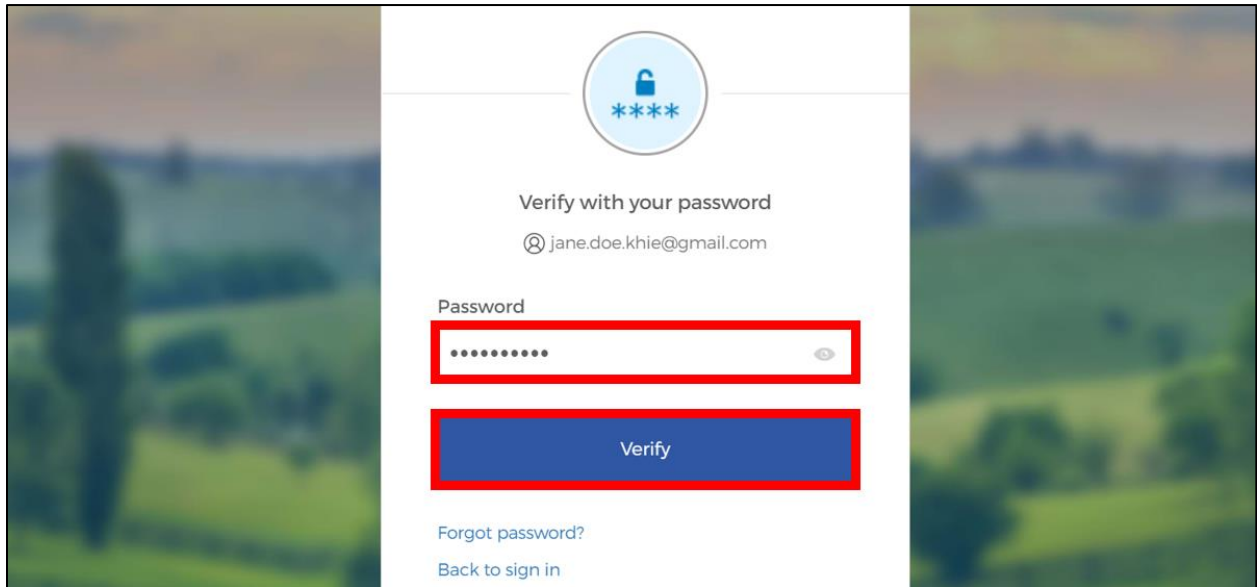
Please Note: You also have the option to access the ePartnerViewer from the **KOG Dashboard** screen **after** logging into KOG.

•   To navigate to the new **KOG Login** screen and begin logging in, you must enter the following URL in a supported browser window: **kog.chfs.ky.gov**.

•   On the **KOG Login** screens, enter your **Email Address** and **Password**.

•   Once you have completed logging into KOG, you will be navigated to the **KOG Dashboard** screen. To access the ePartnerViewer, you must click **Launch** on the KHIE ePartnerViewer application located on the **KOG Dashboard** screen.

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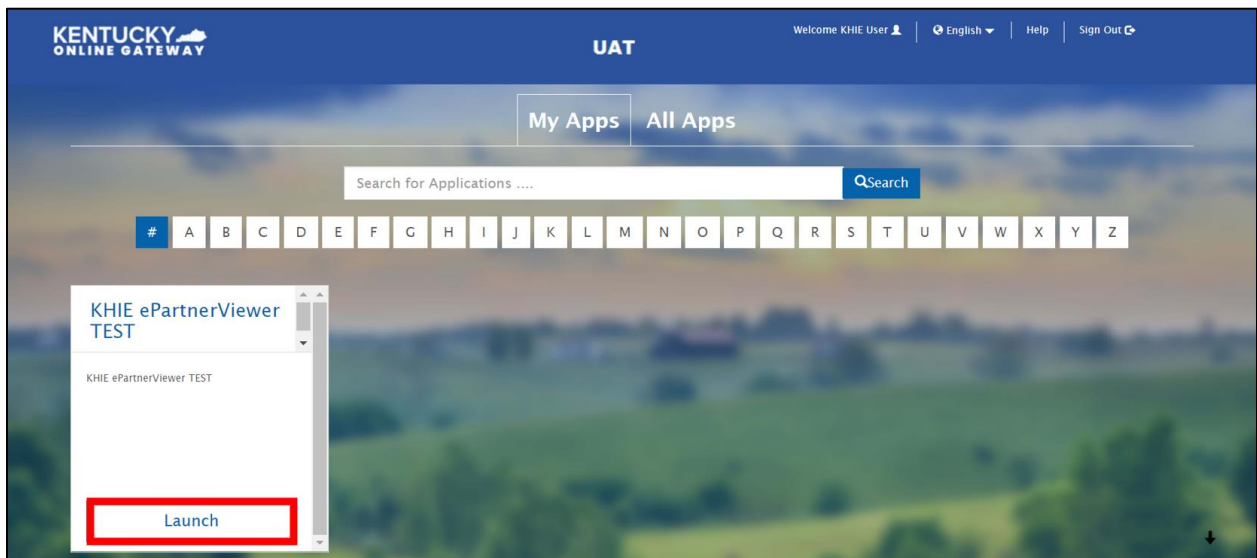
5   Complete Okta Verify MFA (Subsequent Login)

After logging into KOG and verifying your password, you are automatically navigated to the **Verify it's you with a security method** screen. You will be asked to complete Multi-Factor Authentication (MFA) using Okta Verify. Users have two (2) options for completing Okta Verify for MFA:

- Use a security code from the Okta Verify app.
- Use the push notification from the Okta Verify app.
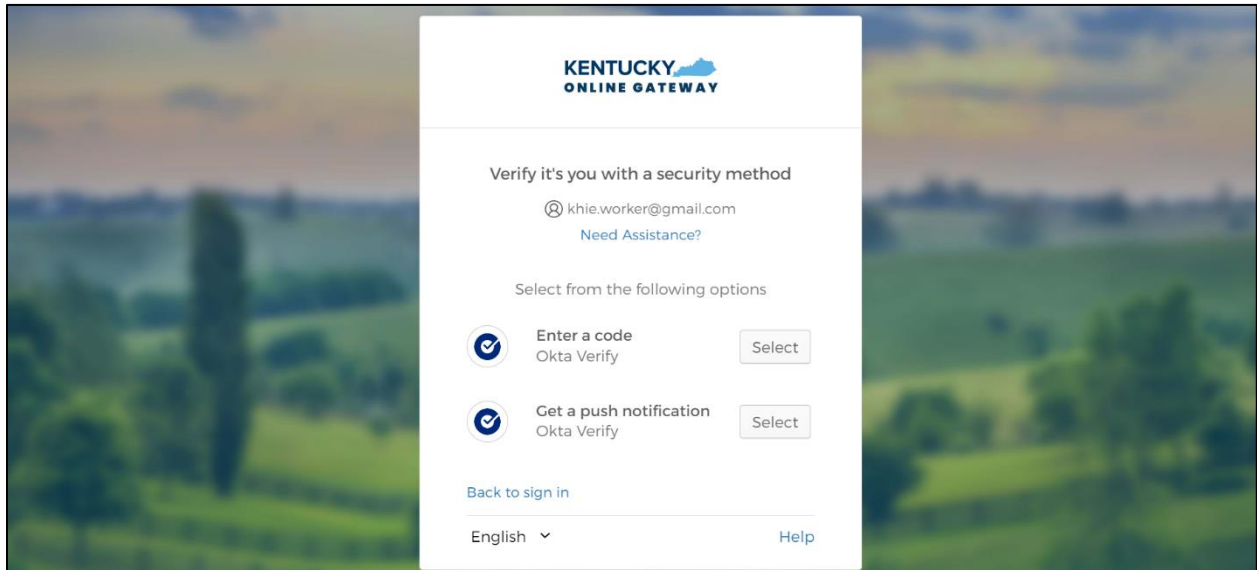
Security Code from Okta Verify App

To complete MFA using the security code from Okta Verify, complete the following steps:

1. After logging into KOG, you are navigated to the **Verify it's you with a security method** screen. Click the **Select** button next to **Enter a code**.

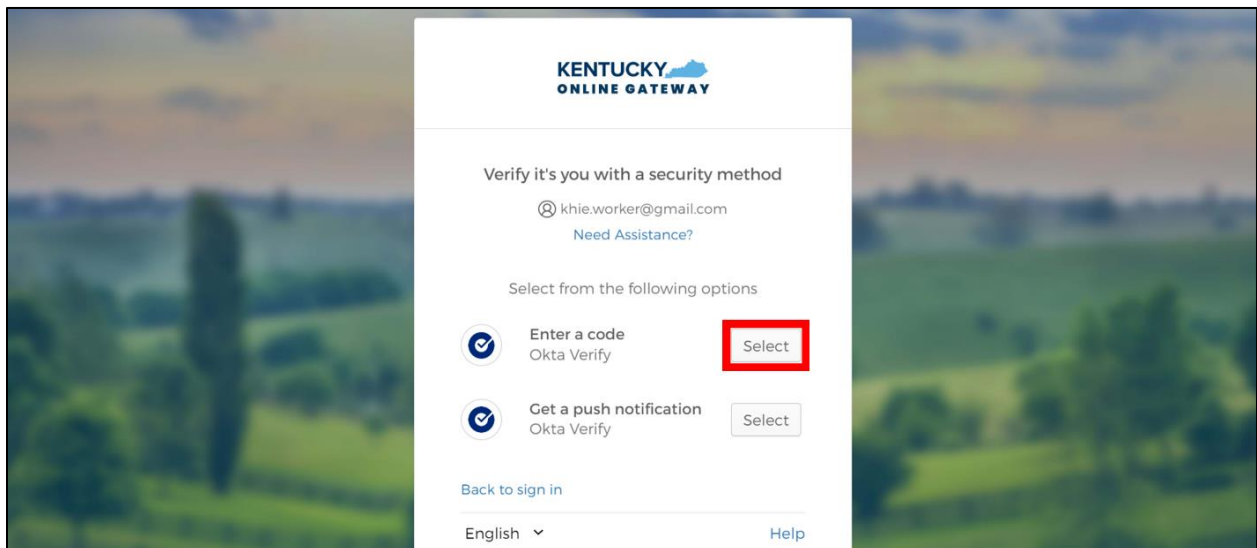2. To locate the Okta Verify code, complete the following steps from your mobile device or tablet:

- *Step 1*: Open the **Okta Verify app** on your mobile device or tablet.

- *Step 2*: If the code is hidden, click the **Eye Icon** below the email address used for your KOG account.

- *Step 3*: Verify your identity using either **Touch ID** or **Face ID**.

- *Step 4*: Upon verifying your identity, the **6-digit code** displays.
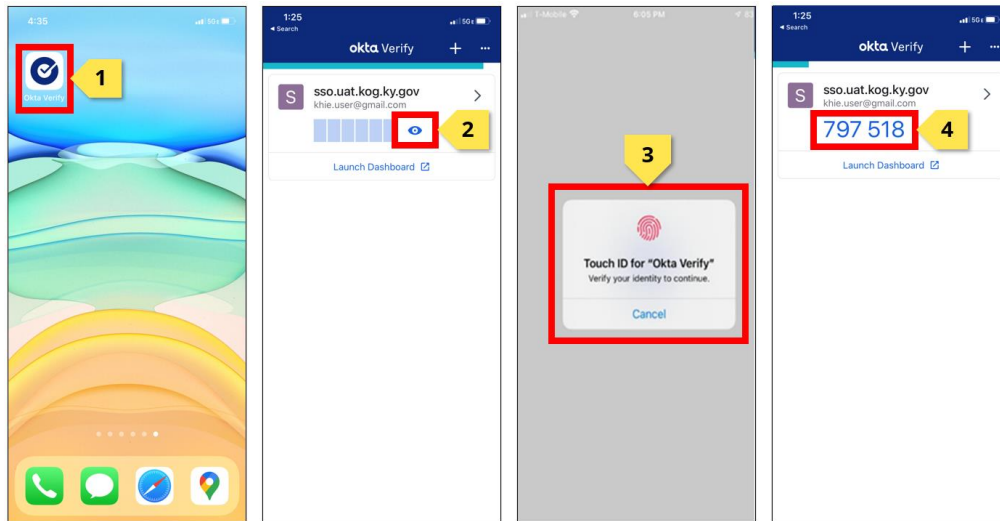
3. Return to the **Enter a code** screen on your computer. Enter the **6-digit code** from the Okta Verify app. Click **Verify** to proceed to the **Terms and Conditions of Use** screen of the ePartnerViewer.

Please Note: Once you enter the code from the Okta Verify app, you are automatically navigated to the **Terms and Conditions of Use** screen. For more information, please review the *Terms and Conditions of Use and Logging In* sub-section of this chapter.

Push Notification from Okta Verify App

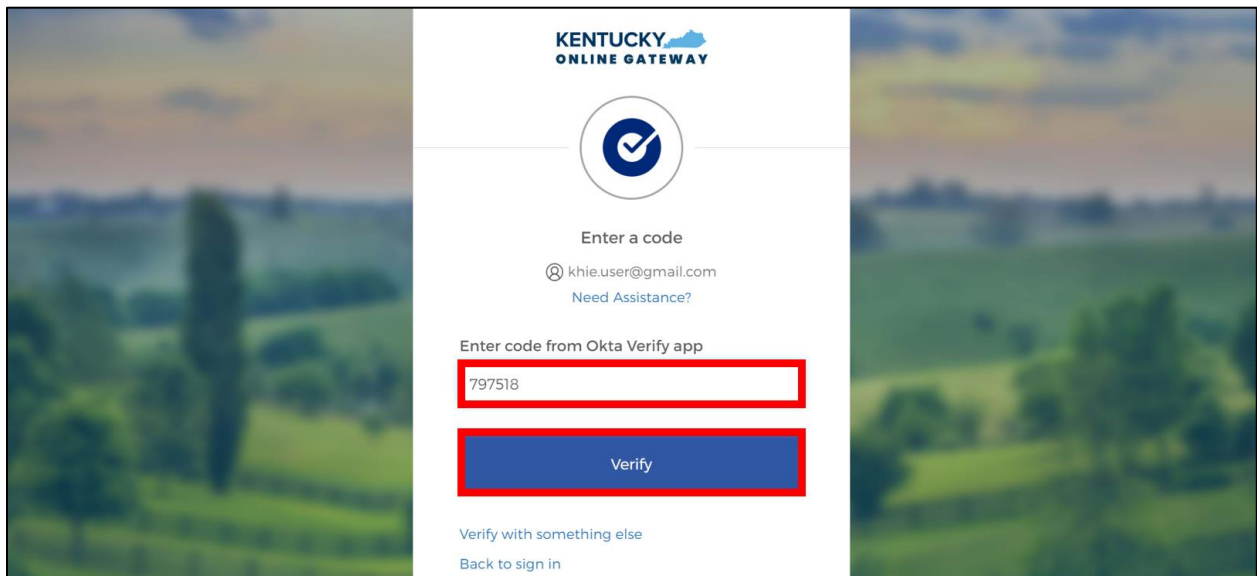To complete MFA using a push notification from Okta Verify, complete the following steps:

1. After logging into KOG, you are navigated to the **Verify it's you with a security method** screen. Click the **Select** button next to **Get a push notification**.
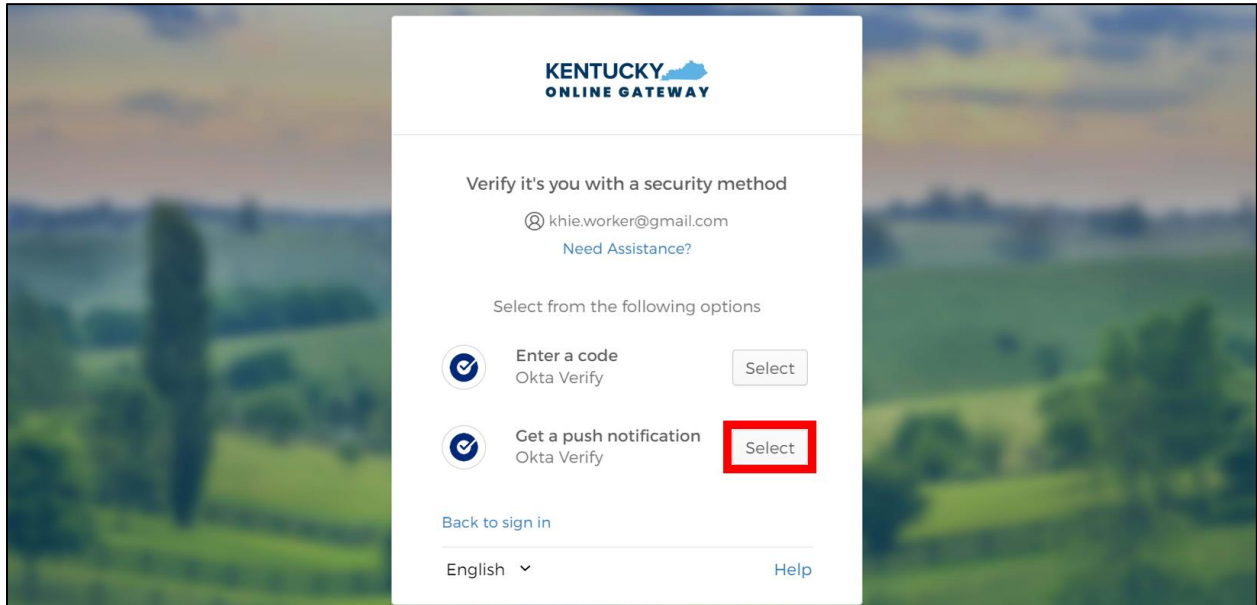
2. The **Get a push notification** screen displays. Click **Send Push**.
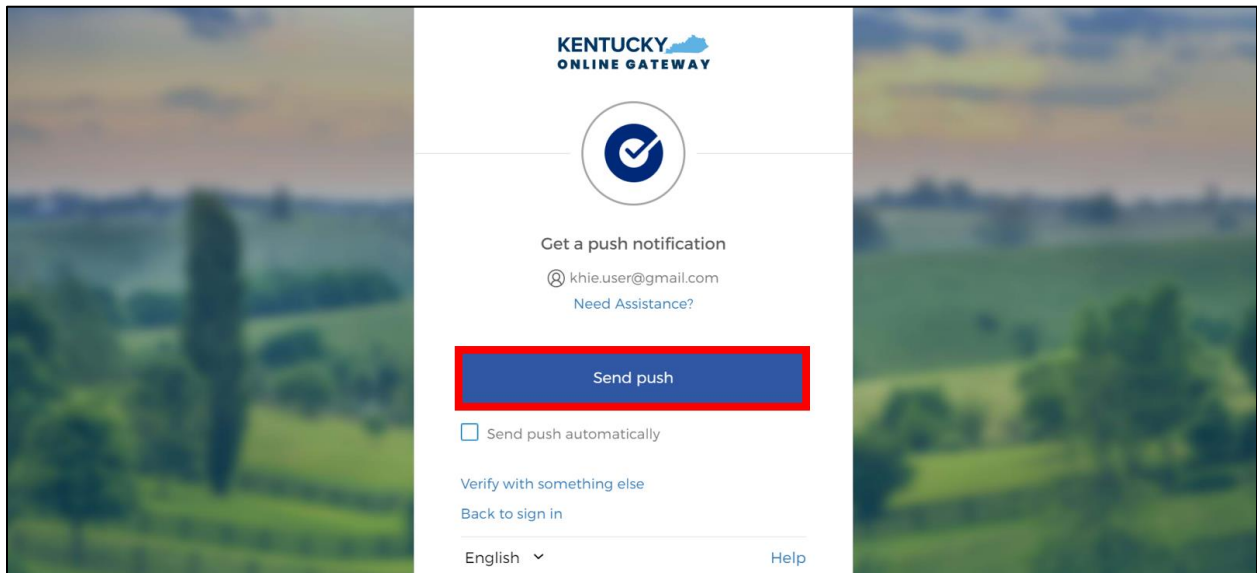
Please Note: Once the push notification has been successfully sent to the Okta Verify app, the **Get a push notification** screen of the ePartnerViewer displays a grayed out **Push notification sent** button.
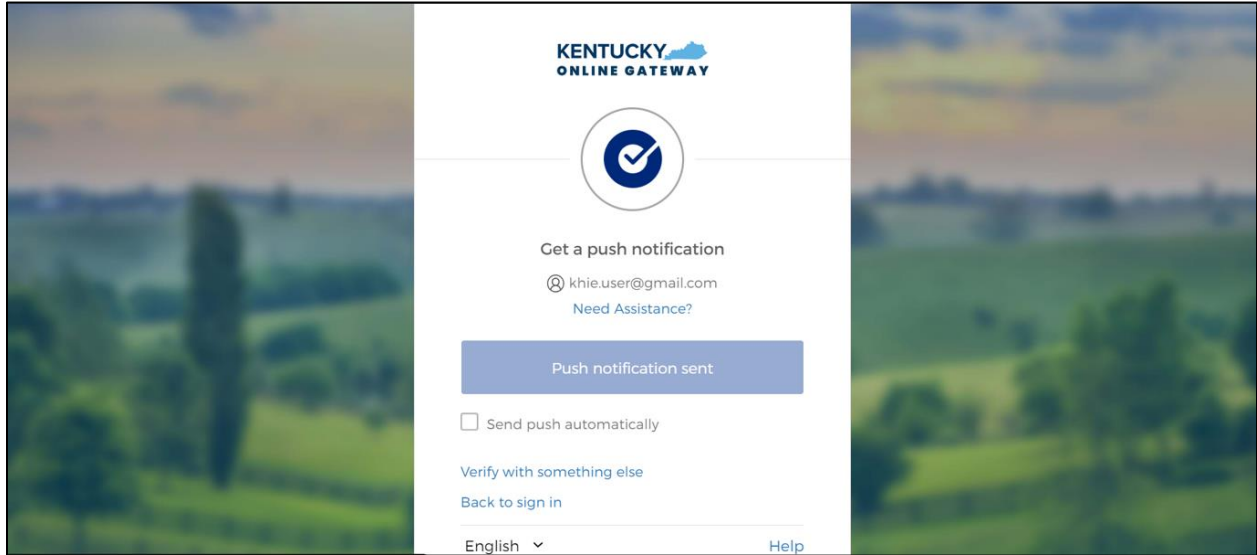
3. To view the Okta Verify push notification, complete the following steps from your mobile device:

- *Step 1*: You will receive a push notification on your mobile device or tablet. Tap and hold the notification banner titled "**Did You Just Try to Sign In?**".

- *Step 2*: On the notification, click the **Yes, It's Me** button.

- *Step 3*: A notification will appear on your mobile device screen letting you know that you have successfully responded to the push authentication request. You can now return to your computer where you will be redirected to the **Terms and Conditions of Use** screen of the ePartnerViewer.

Please Note: Once you successfully respond to the Okta Verify push notification, you are automatically navigated to the **Terms and Conditions of Use** screen of the ePartnerViewer.
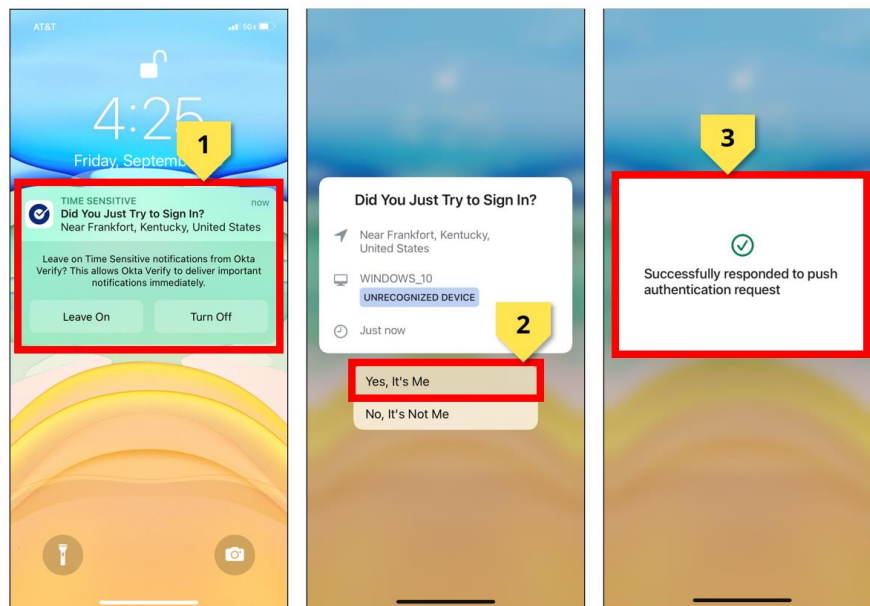
Terms and Conditions of Use and Logging In

After logging into the Kentucky Online Gateway, launching the ePartnerViewer application, and completing Multi-Factor Authentication, the **Terms and Conditions of Use** screen displays. Privacy and security obligations are outlined for review.

1. You must click **I Accept** every time before accessing a patient record in the ePartnerViewer.
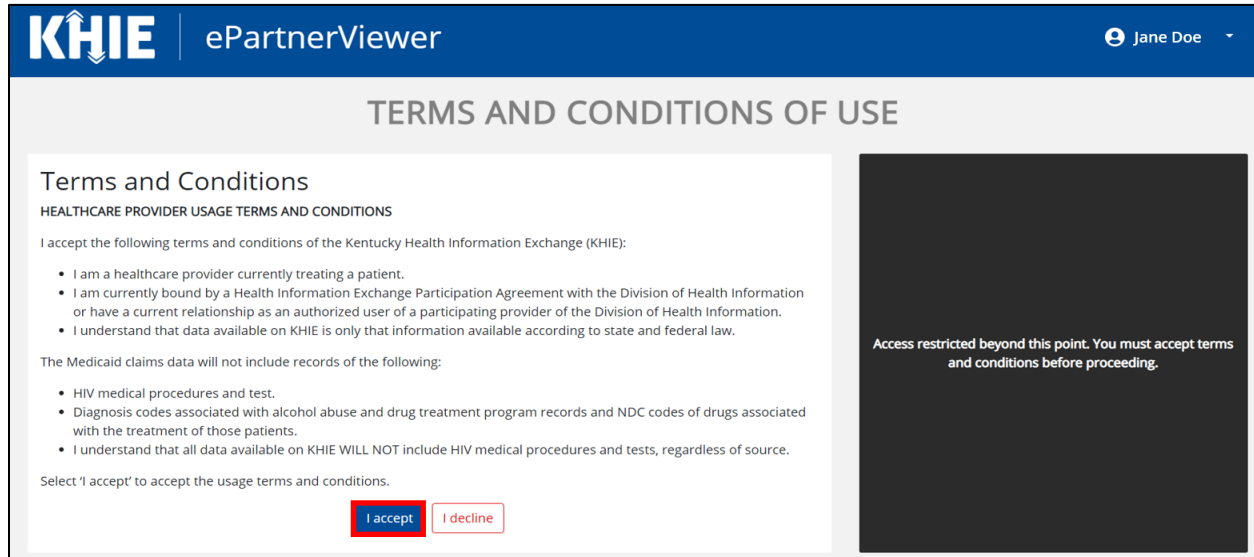
> **Please Note:** The right side of the Portal is grayed out and displays a message that states:
> *Access is restricted beyond this point. You must accept the terms and conditions before proceeding.*

2. Once you click **I Accept**, the grayed-out section becomes visible. A message appears that indicates you are associated with an Organization. (This is the name of your organization.)

3. Click **Proceed to Portal** to continue to the ePartnerViewer application.
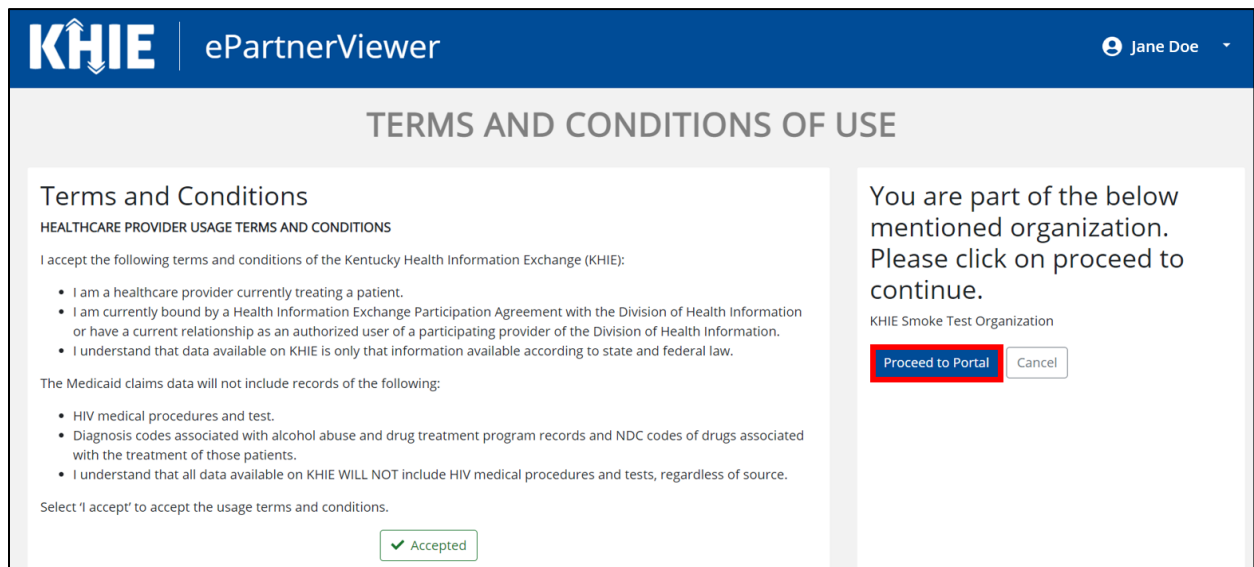
6   Logging Out of the ePartnerViewer
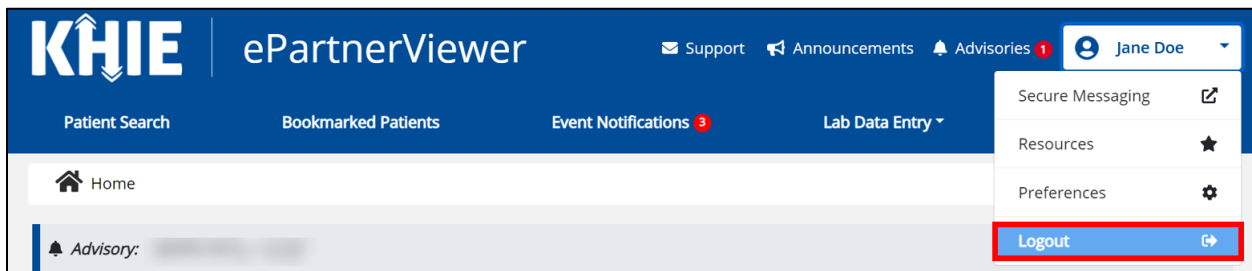
Users must completely **log out** and close all ePartnerViewer tabs in order to maintain security and to avoid session timeout issues.

1. To log out of the ePartnerViewer, click your **User Profile** displayed in the top right corner of the blue navigation bar.

2. Select **Logout** from the dropdown menu.

3. To confirm that the logout was successful, you must wait for the **Signing Out of Kentucky Online Gateway** screen to fully load **_before_** closing out of the browser window.

4. Once the **Signing Out of Kentucky Online Gateway** screen has fully loaded, click the **X button** at the top right corner to close out of the browser window.
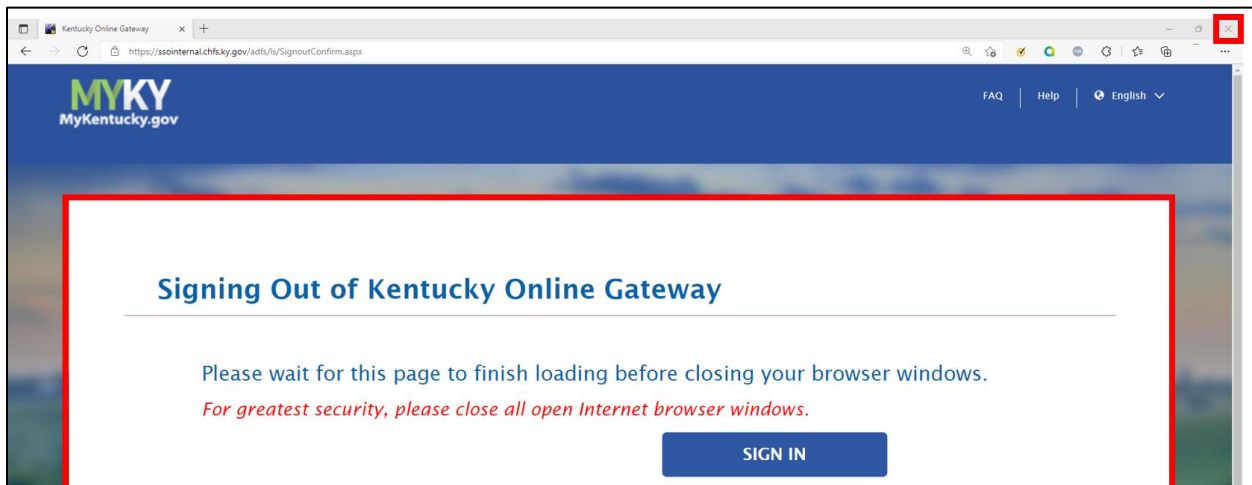
Please Note: You must properly logout and close the browser window to end the ePartnerViewer session. If you do **not** properly close the ePartnerViewer session, you may experience timeout issues when attempting to access the ePartnerViewer in a new browser window (i.e., you may be logged out because another ePartnerViewer session is still active in a different window). To avoid issues, you only have **one** active ePartnerViewer session at a time.

7   Appendix

After logging in for the first time, you are asked to set up a security method to complete Multi-Factor Authentication (MFA) to gain access to the ePartnerViewer. Users have the option to add a new security method or remove an existing security method at any time by updating the MFA options under their **KOG Account Settings**. If you are presented with multiple security method options, KOG highly recommends that setting up Okta Verify as your primary MFA option. KOG recommends that you also set up **Phone Authentication** as an additional security method. To add Phone Authentication as a secondary security method, you must update your KOG Account Settings.
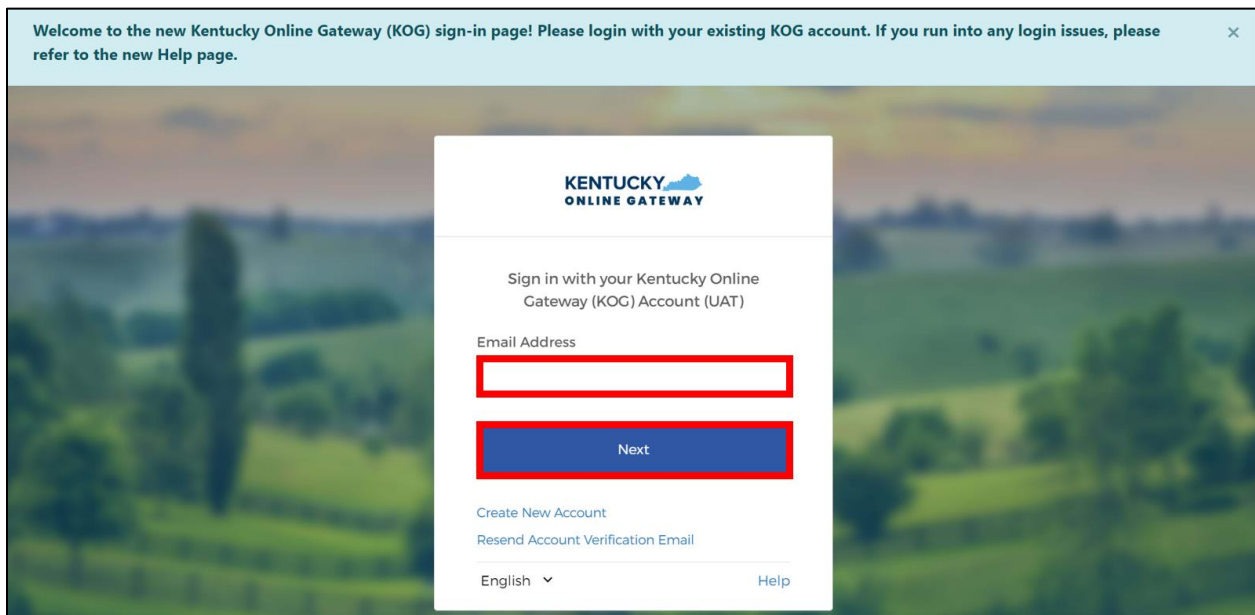
Add/Remove MFA Security Methods

To add a new security method or remove an existing security method, complete the following steps:
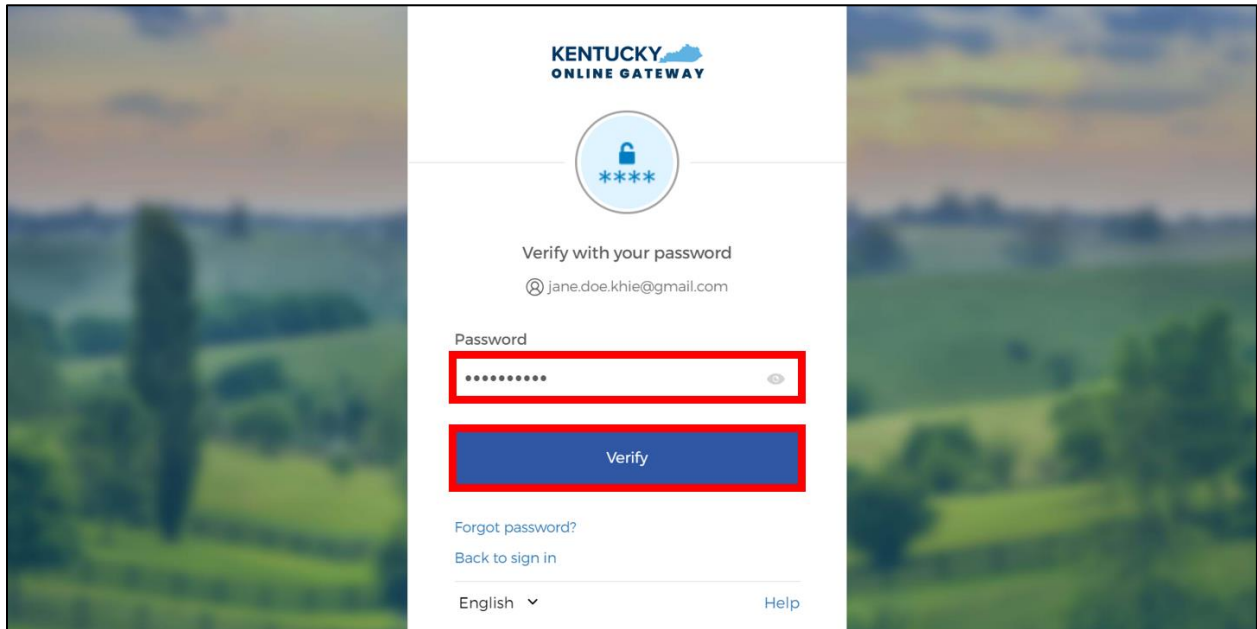
1. To navigate to the new **KOG Login** screen and begin logging in, you must enter the following URL in a supported browser window: **kog.chfs.ky.gov**.
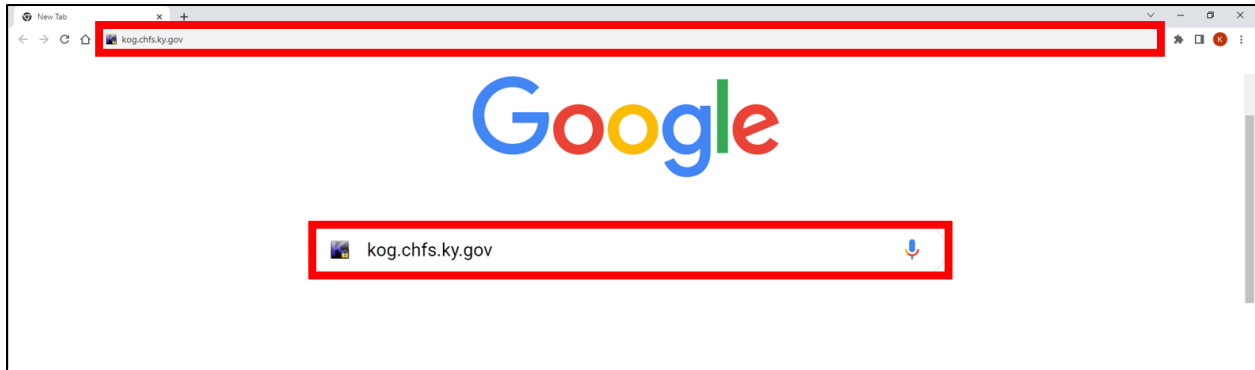

2. The new **KOG Login** screen displays. Enter your **Email Address**. Click **Next**.

3. The **Verify with your password** screen displays. Enter your **Password**. Click **Verify**.


4. The **Verify it's you with a security method** screen displays. You have the option to complete Okta Verify MFA by entering a code or getting a push notification from the Okta Verify app.

5. Click **Select** next to the preferred Okta Verify MFA option.
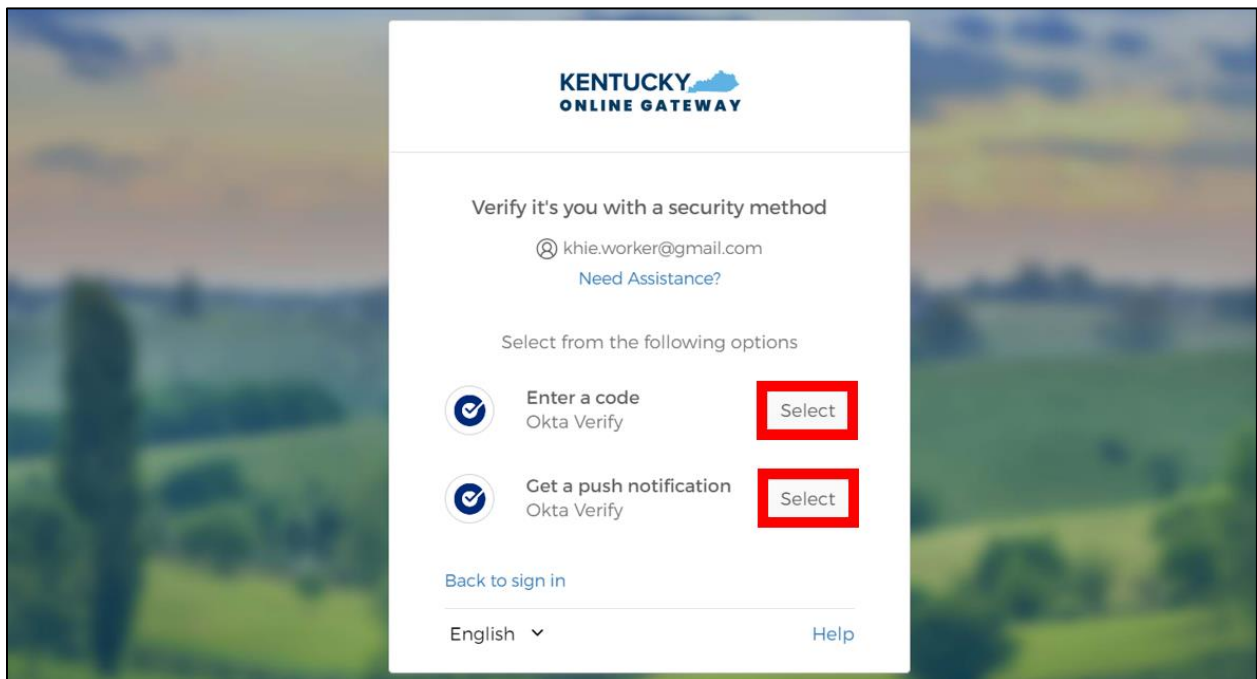
6. If the Okta Verify code option was selected, the **Enter a code** screen displays. Enter the **6-digit code** from the Okta Verify app. Click **Verify**.
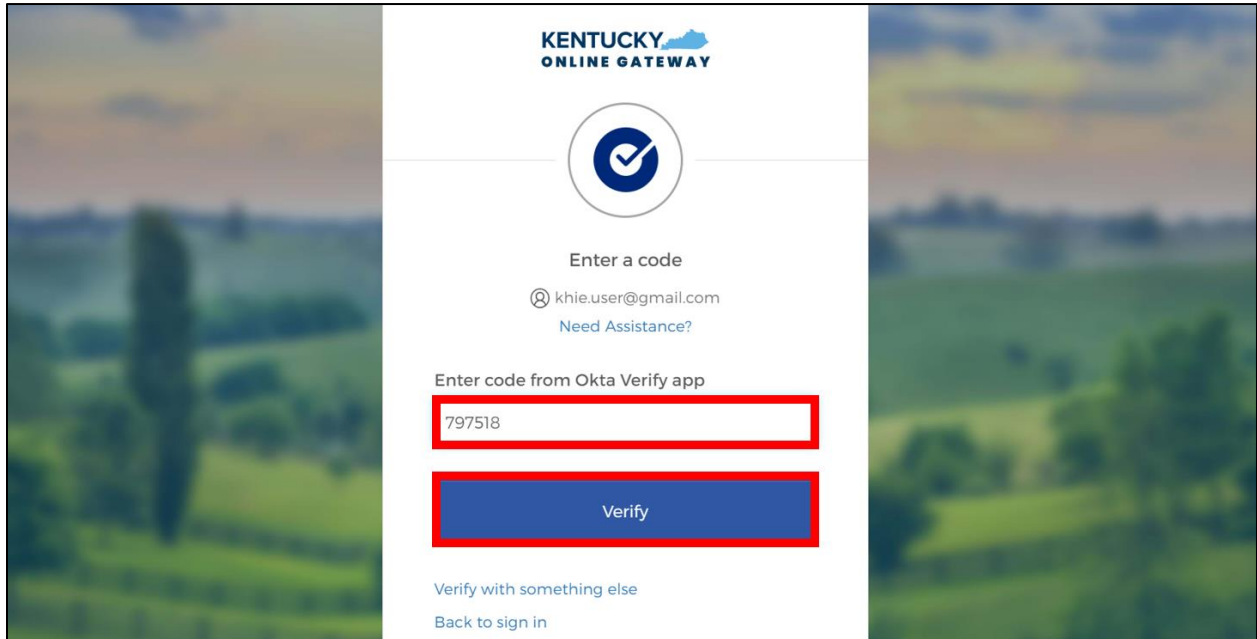
7. If the Okta Verify push notification option was selected, the **Get a push notification** screen displays. Click the **Send Push** button. You must respond to the Okta Verify push notification on your mobile device.
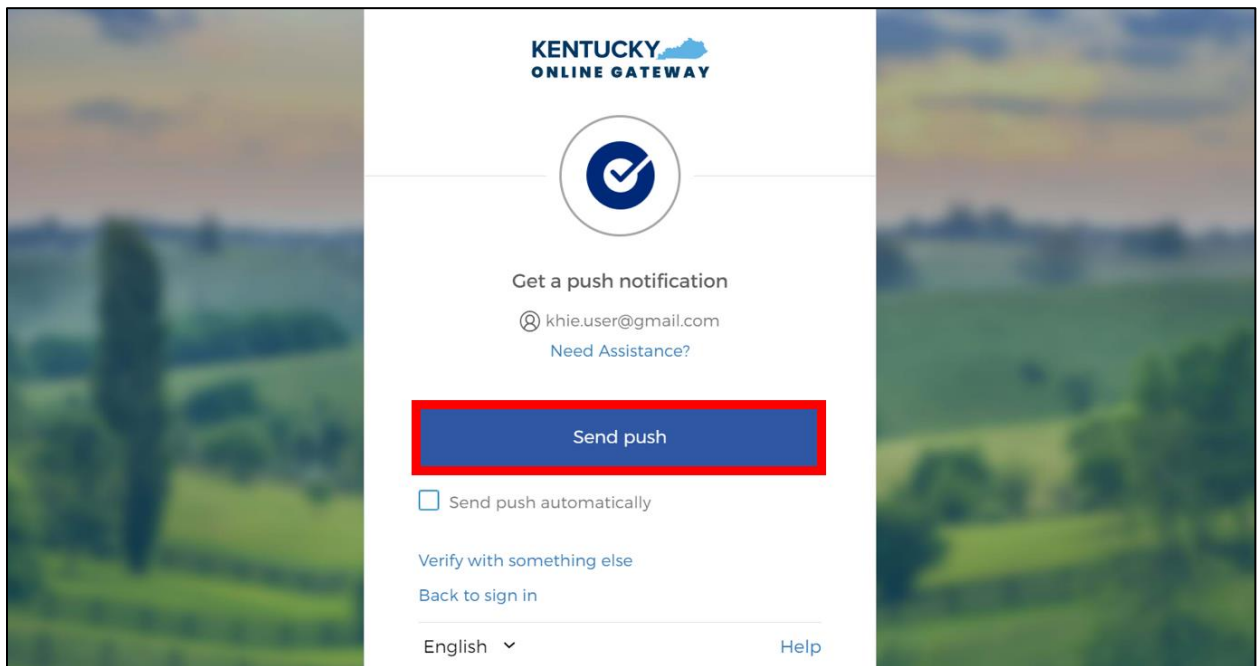
- To complete MFA via the push notification, complete the following steps from your mobile device:

  o _Step 1_: You will receive a push notification your mobile device or tablet. Tap and hold the notification banner titled "**Did You Just Try to Sign In**?".

  o _Step 2_: On the notification, click the **Yes, It's Me** button.

  o _Step 3_: A notification will appear on your mobile device screen letting you know that you have successfully responded to the push authentication request.
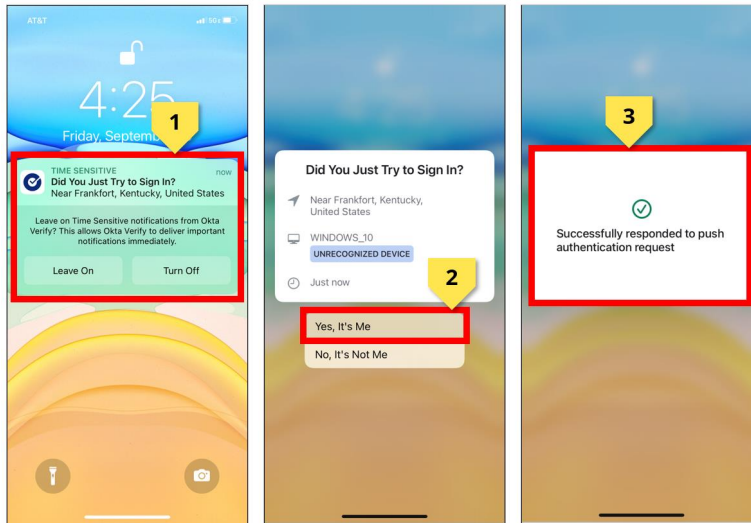

> **Please Note:** After you complete MFA by entering the Okta Verify code or responding to the Okta Verify push notification, you are automatically navigated to the **KOG Dashboard** screen.

8. Once you have completed MFA, you are automatically navigated to the **KOG Dashboard** screen. Click on your **User Name hyperlink** at the top right of the screen to proceed.
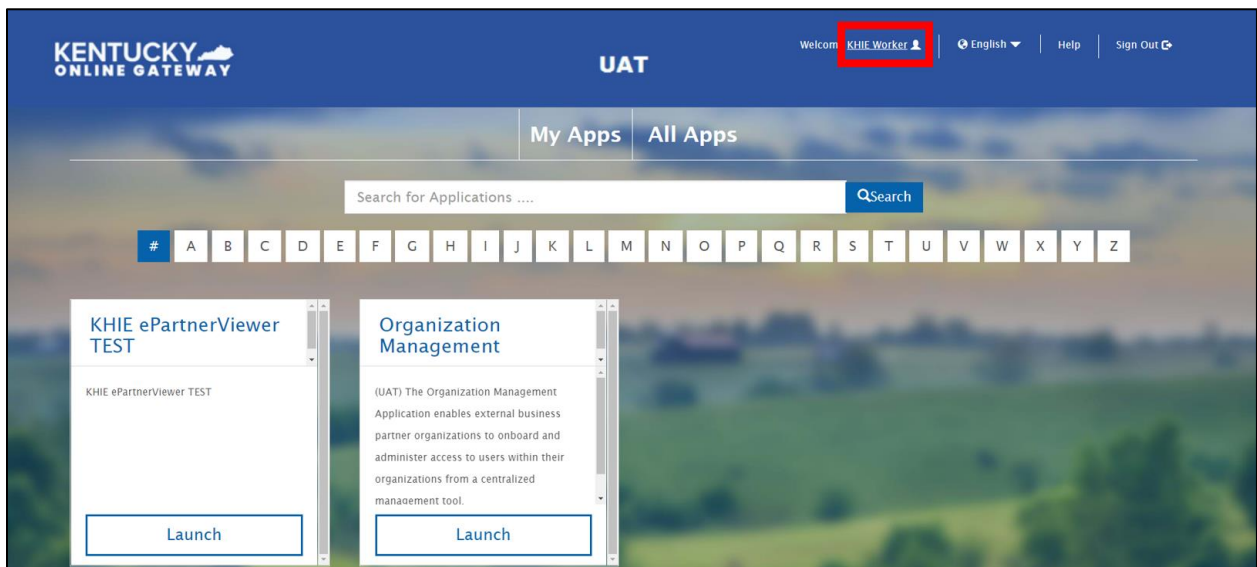
9. The **KOG Account Home** screen displays. Click the **MFA Management** tab to navigate to the **KOG Account Settings** screen.
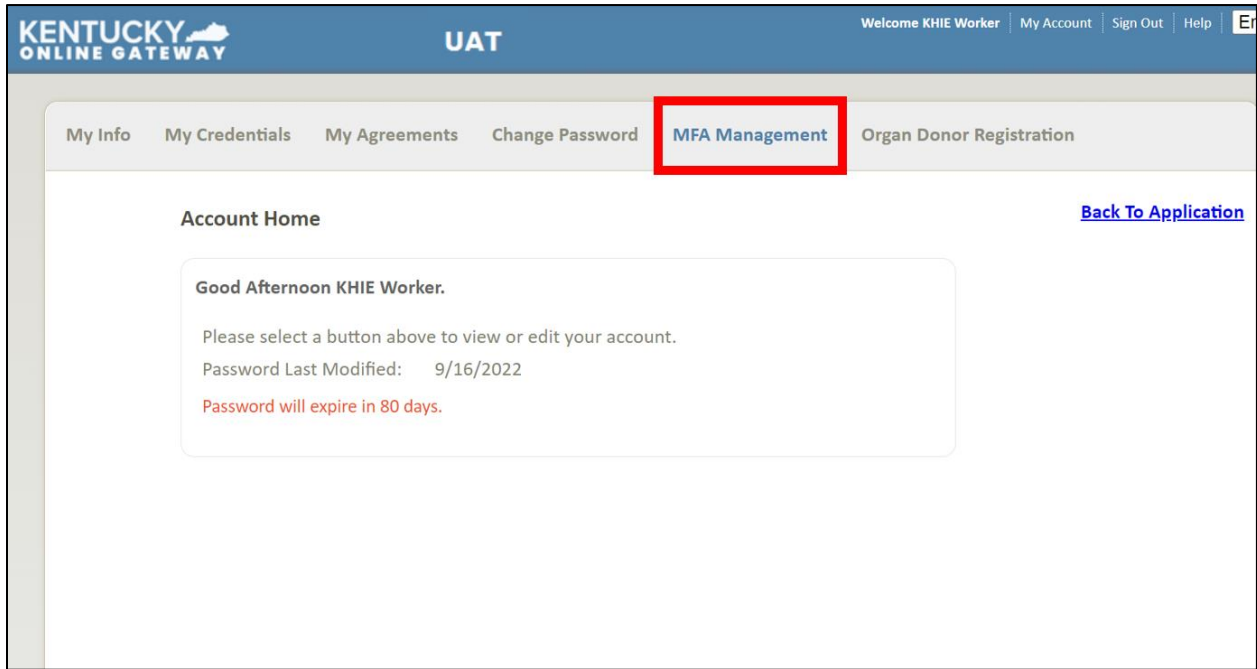

10. On the **KOG Account Settings** screen, scroll down to the *Security Methods* section. You have the option to add or remove different security methods by updating the *Security Methods* section.
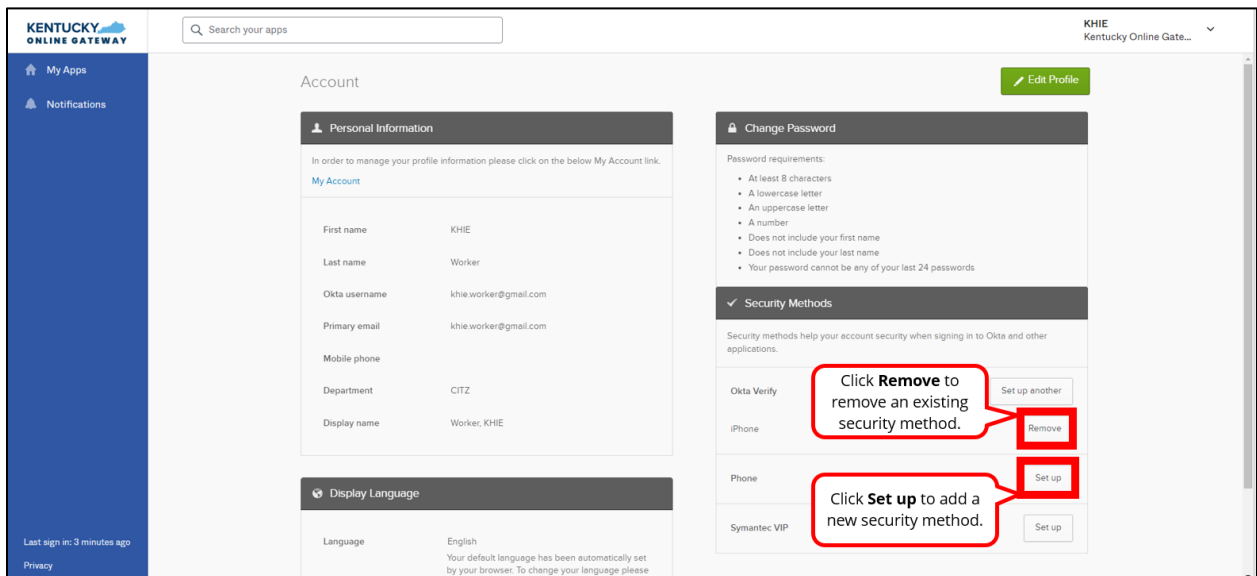
Add Phone Authentication for MFA

To add Phone Authentication as an additional security method for MFA, complete the following steps:

11. On the **KOG Account Settings** screen, click the Phone **Set up** button under the *Security Methods* section at the bottom of the screen.
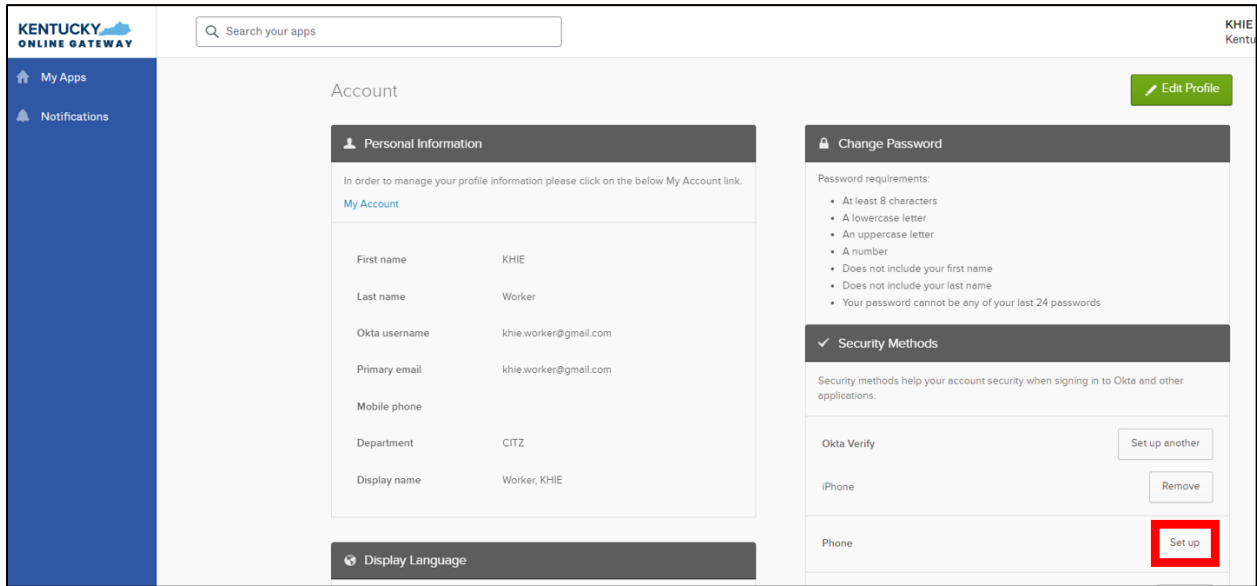

12. The **Get a push notification** screen displays. Click **Send Push**.

13. You must respond to the Okta Verify push notification on your mobile device. To complete MFA via the Okta Verify push notification, you must follow the steps listed under step 7 of the **Add/Remove MFA Security Methods** sub-section of this chapter.
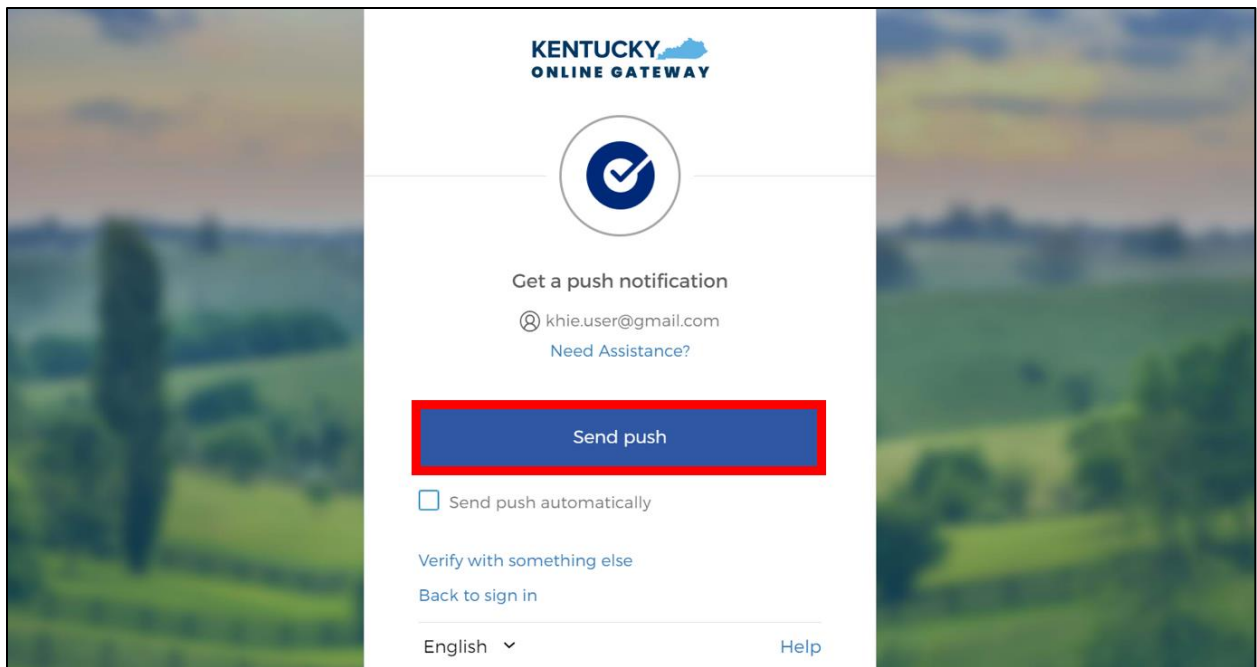
Please Note: After you complete MFA by successfully responding to the Okta Verify push notification, you are navigated to the **Set up security methods** screen.

14. The **Set up security methods** screen displays. Click the Phone **Set up** button.
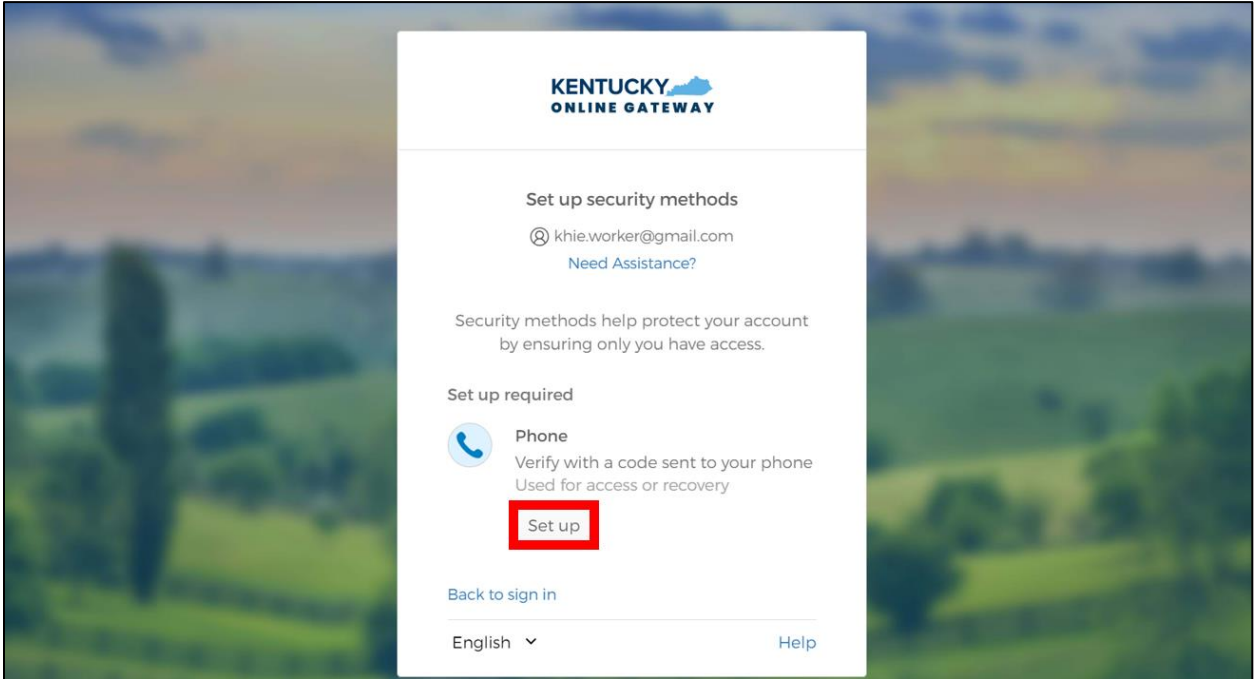
15. The **Set up phone authentication** screen displays. You have the option to receive a verification code via SMS Text Message or Voicemail.

• To receive a verification code via SMS Text Message, please review the ***Phone Verification by SMS Text Message*** sub-section of this chapter.

• To receive a verification code via Voice Call, please review the ***Phone Verification by Voice Call*** sub-section of this chapter.
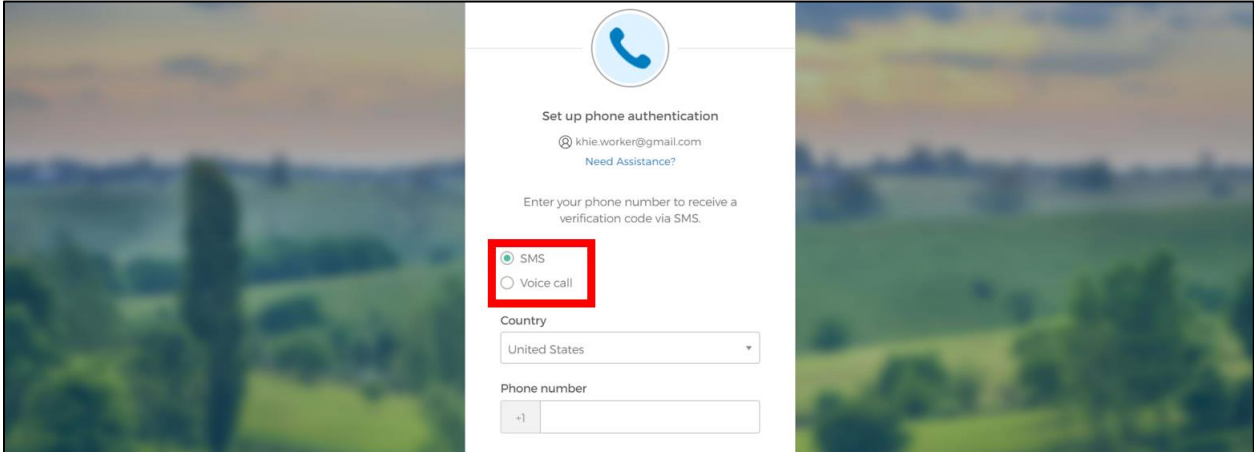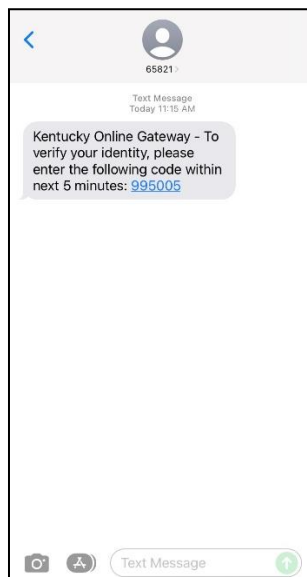
Phone MFA by SMS Text Message

16. To receive a Phone verification code via SMS Text Message, complete the following steps:

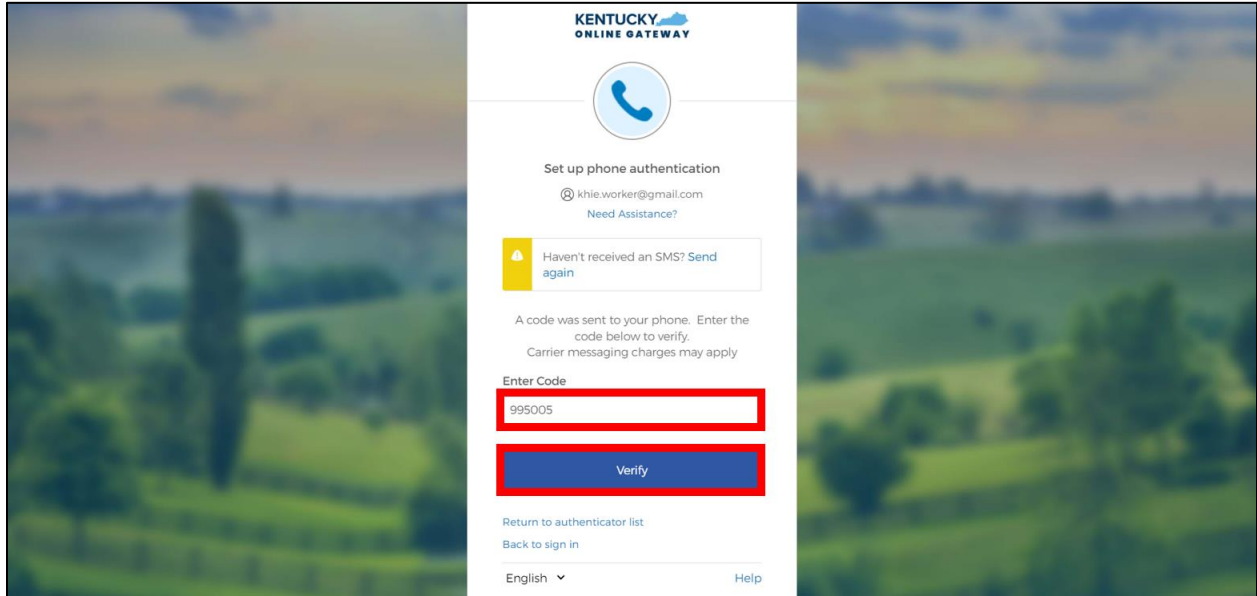- On the **Set up phone authentication** screen, click the **SMS** radio button.

- Enter the **10-digit phone number** for your mobile device in the *Phone Number* field.

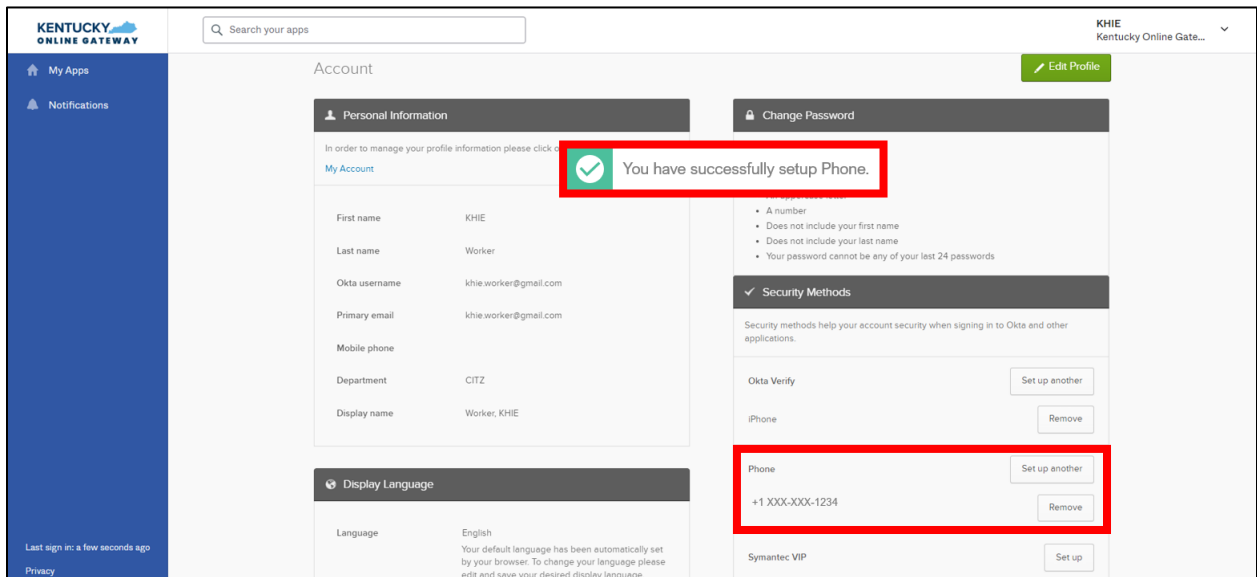- Click the **Receive a code via SMS** button at the bottom of the screen.
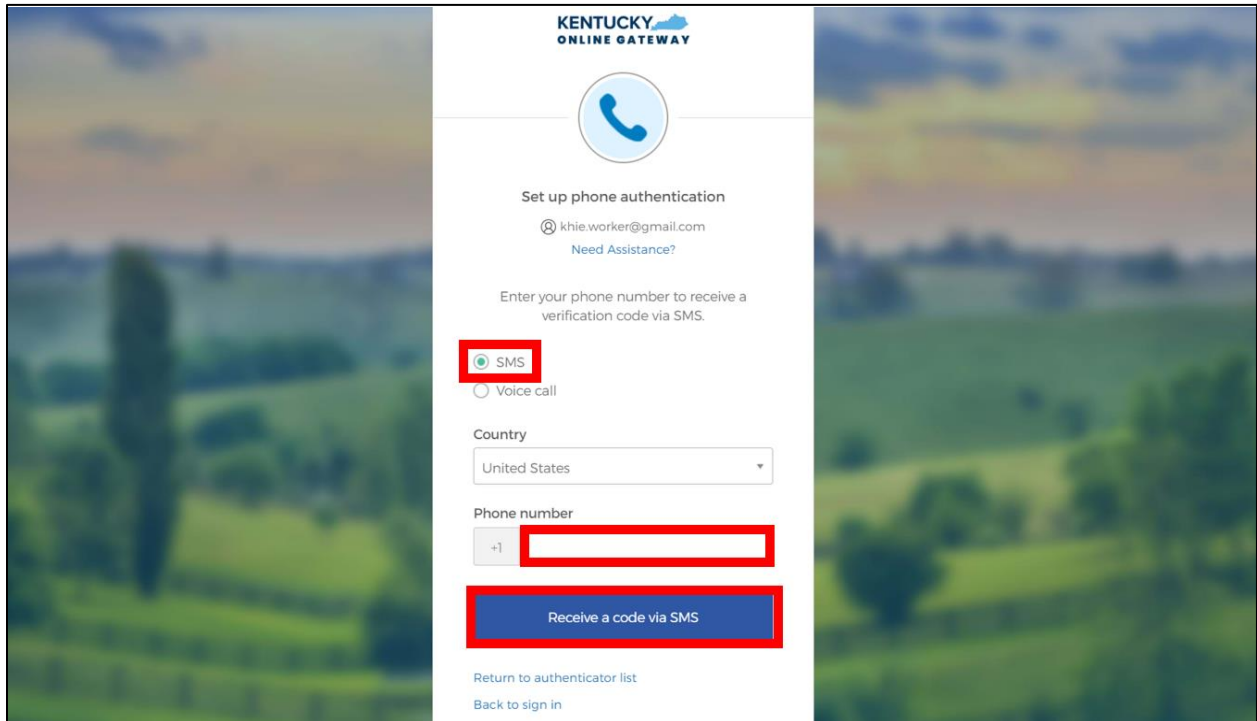
- On your mobile device, you will receive a text message from the Kentucky Online Gateway that will include a **6-digit passcode** that will be used for verification.

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- On the **Set up phone authentication** screen, enter the **6-digit code** from the text message into the *Enter Code* field to verify the mobile number.

- Click **Verify** to complete Phone Authentication by SMS text message.

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Please Note: If the code was entered correctly, KOG will recognize that Phone MFA by SMS Text Message enrollment is complete, and you will be automatically navigated to the **KOG Account Settings** screen. A banner displays at the top of the screen indicating that you have successfully set up Phone Authentication by SMS Text Message as an additional security method.

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Phone MFA by Voice Call

17. To receive a Phone verification code via Voice Call, complete the following steps:

- On the **Set up phone authentication** screen, click the **Voice Call** radio button.

- Enter your **10-digit phone number** in the *Phone Number* field. If applicable, enter the **Extension Number** in the *Extension* field.

- Click the **Receive a code via voice call** button at the bottom of the screen.
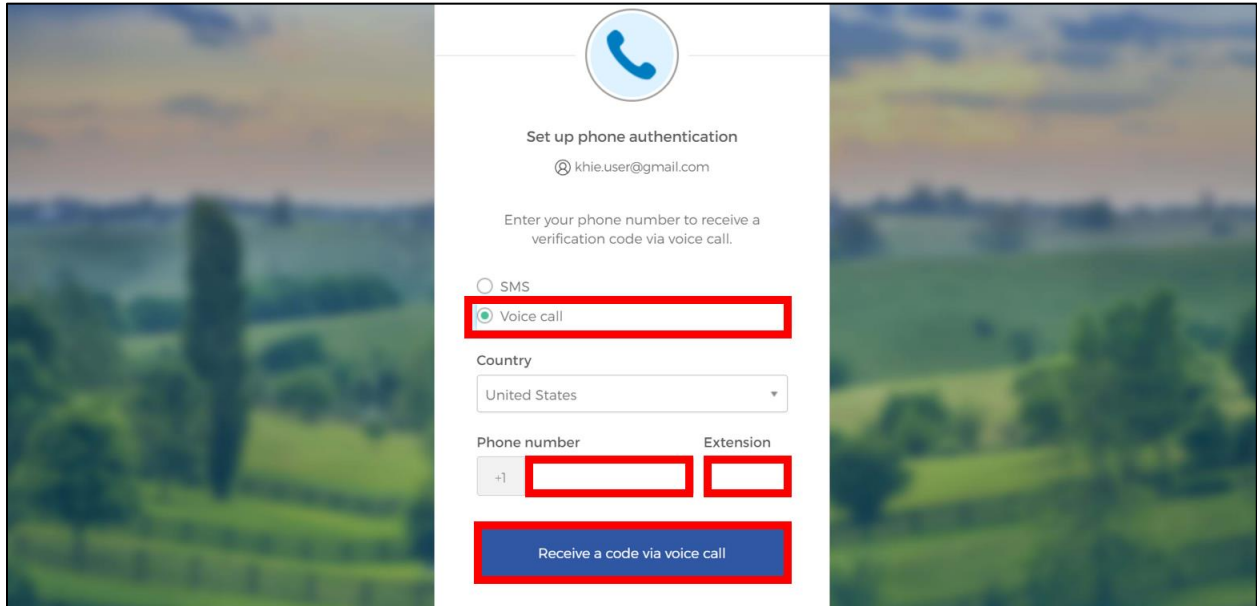
- On your phone, you will receive a phone call from the Kentucky Online Gateway that will include a **5-digit passcode** that will be used for verification.

- On the **Set up phone authentication** screen, enter the **6-digit code** from the phone call into the *Enter Code* field to verify the mobile number.

- Click **Verify** to proceed.
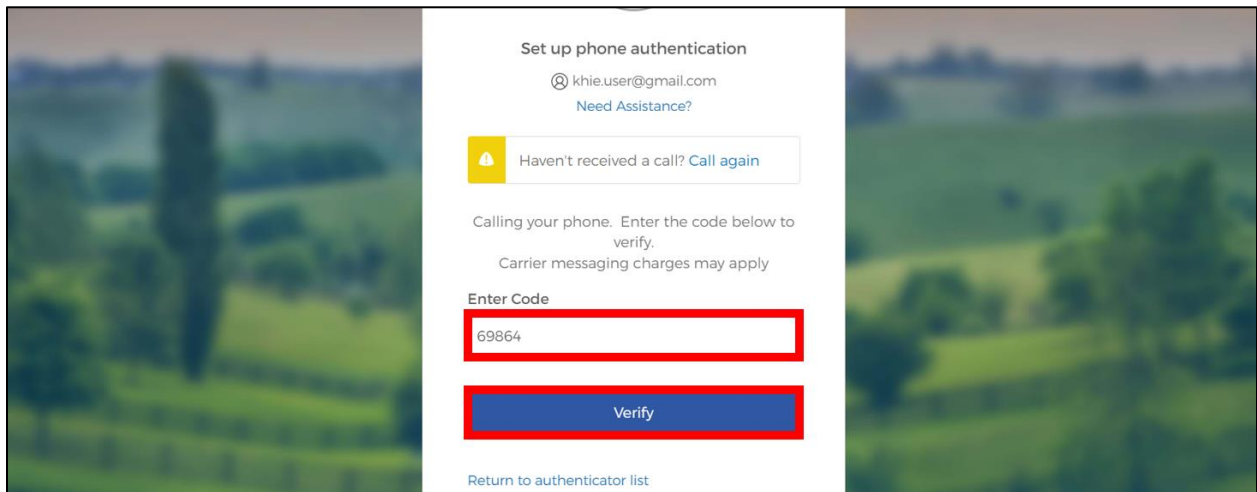
18. Upon verifying the mobile number, you are automatically navigated to the **KOG Account Settings** screen. A banner displays at the top of the screen indicating that you have successfully set up Phone Authentication as an additional security method. Review the *Security Methods* section to view the completed Phone Authentication MFA option.
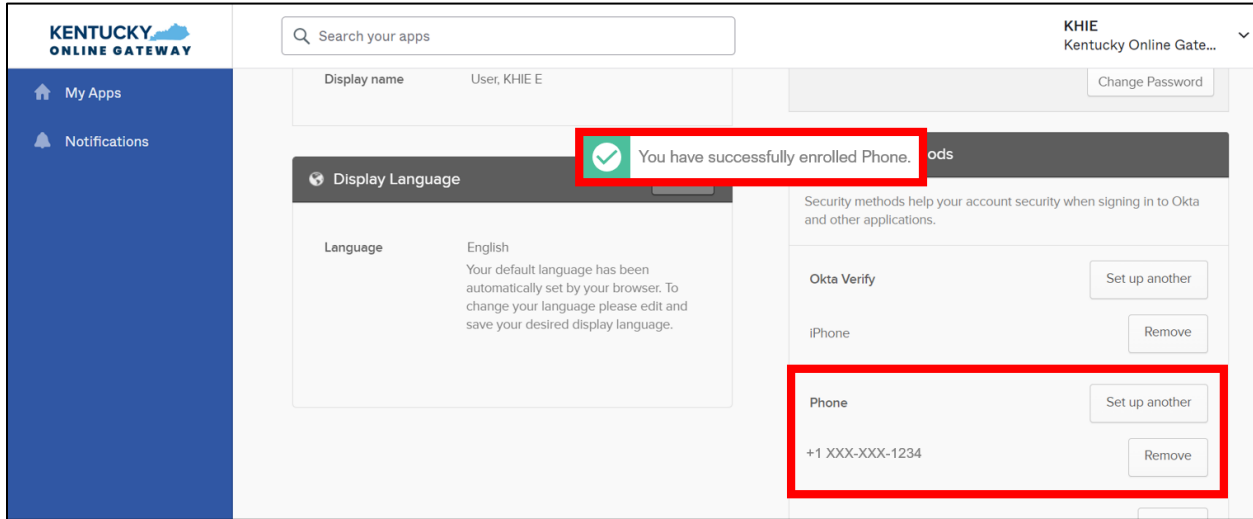
19. To navigate to the **KOG Dashboard** screen, click the **Kentucky Online Gateway logo** at the top left of the **KOG Account Settings** screen.
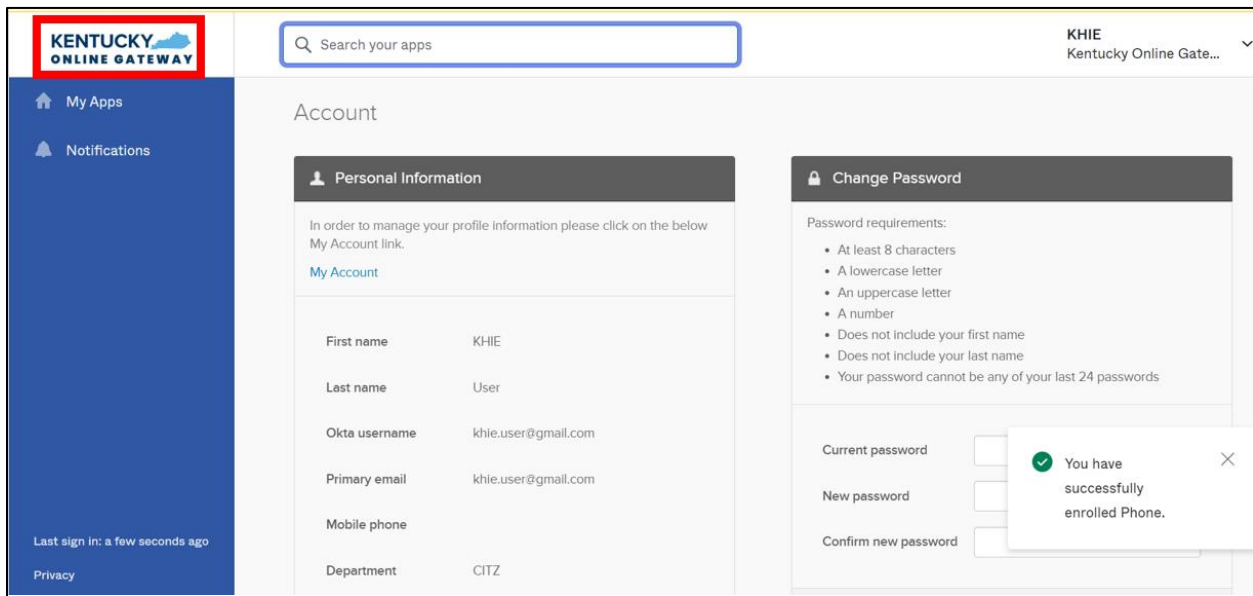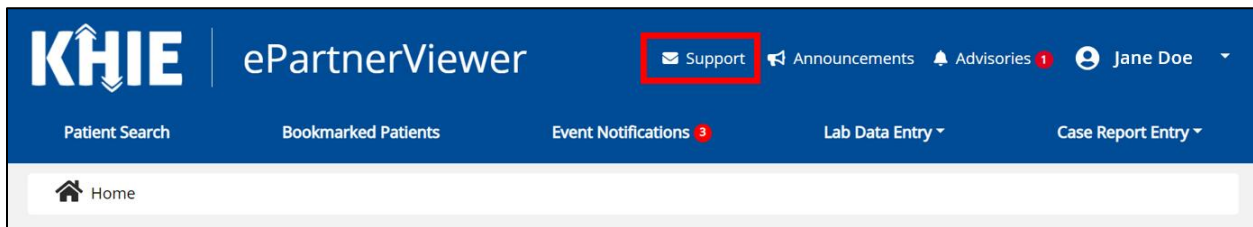
20. To access the ePartnerViewer, you must click **Launch** on the KHIE ePartnerViewer application located on the **KOG Dashboard** screen.
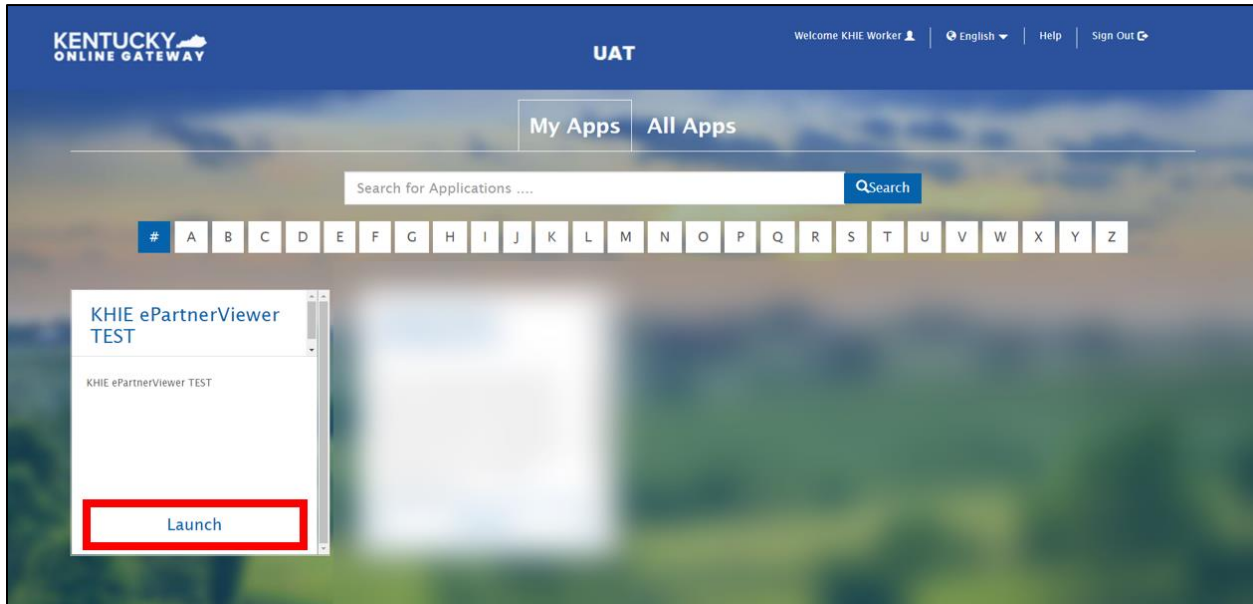
8   Technical Support

Support Tab

Use the Support Tab in the ePartnerViewer located in the blue navigation bar at the top of the screen to seek assistance or log issues.

Toll-Free Telephone Support

For questions and assistance regarding the ePartnerViewer, please call 1 (877) 651-2505.

Email Support

To submit questions or request support regarding the ePartnerViewer, please email KHIESupport@ky.gov.