# HHS Enterprise Portal Features For Supervisors

**Identity and Access Management**

**February 2022**

TEXAS
Health and Human Services

# Contents

# For Supervisors

The HHS Enterprise Portal is the secure, easy to use site that allows you to access or request new/modified access to multiple state application from just one location! The HHS Enterprise Portal is available 24 hours a day, 7 days a week from any computer, tablet, or smartphone.

The portal provides tools designed specifically to help supervisors or individuals with a supervisor role to manage their staff's access to the Enterprise Portal and the applications they access through the Enterprise Portal.

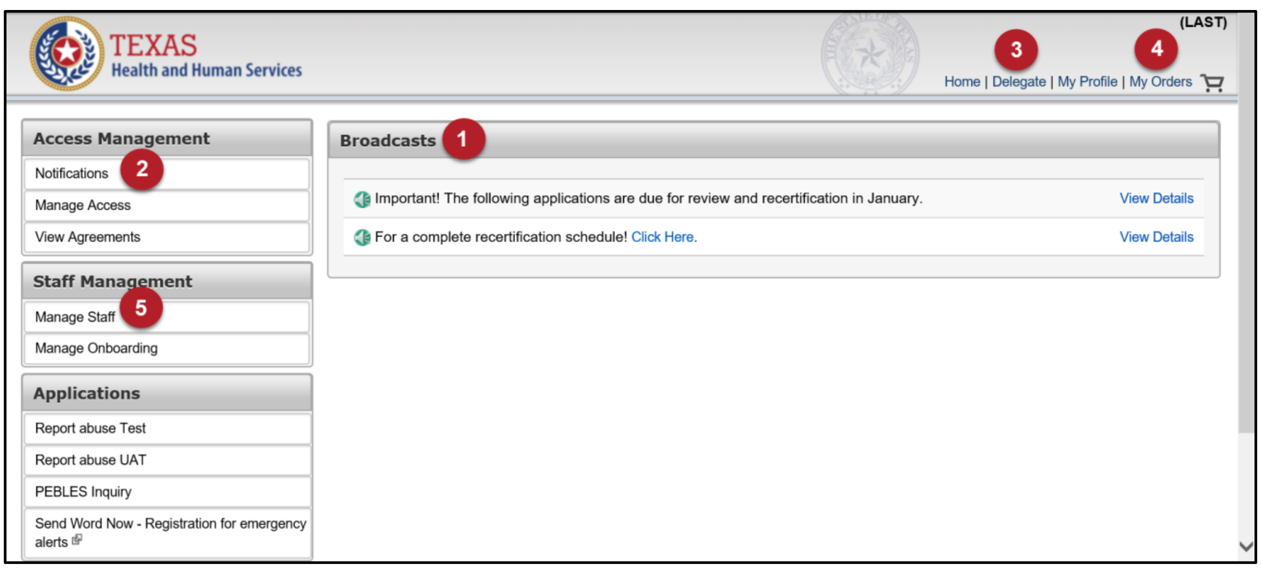
- Reviewing staff Enterprise Portal profile information
- Reviewing staff access
- Removing/suspending/restoring application access
- Suspending Enterprise Portal access for contractors
- Reviewing and performing actions on staff's access requests
- Requesting new or modified application on behalf of staff
- Delegating Enterprise Portal tasks to an employee

For information on recertifying access, see the Recertification Help Guide.

## HHS Enterprise Portal Dashboard

When you first sign-in to the HHS Enterprise Portal you are directed to the Dashboard.

**Figure 1. HHS Enterprise Portal Dashboard**




### Review Notifications

(1) Broadcasts provide information about the portal.

(2) Click **Notifications**, under **Access Management**, to view notifications specific to you. These notifications alert you to the following:

- an update has been performed on a request that you are following
- a certification review is due for your staff
- a staff's access request is waiting for your review.

Click the hyperlinks inside the notification to view more details or perform an action.

## View Delegate Calendar/Manage Delegates

(3) Click the **Delegate** link in the top right-hand corner. You can also access the delegate screens by clicking **Manage Staff** under the **Staff Management** option of the **Main Menu**. See the Assigning Delegates section to learn more about delegation.

## View Orders

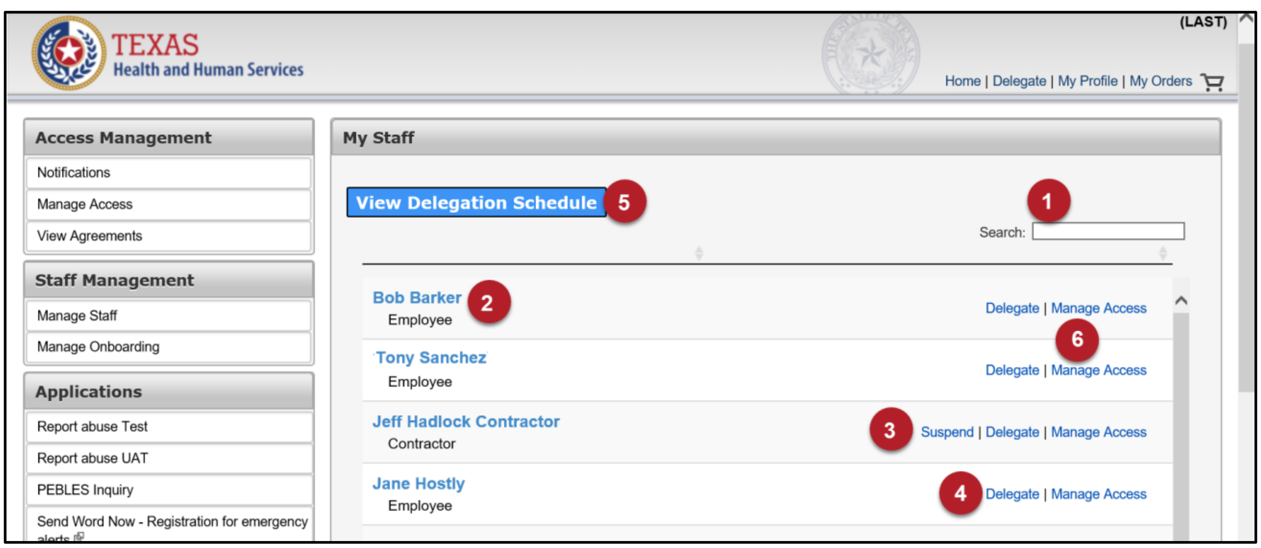
(4) Click the **My Orders** link from the top menu. To learn more about reviewing orders, see Review Orders and Requests.

## View and Manage Staff Access

(5) Click **Manage Staff** under **Staff Management** on the **Dashboard** to open the **My Staff** screen.

# My Staff Screen

**Figure 2. My Staff Screen**




## Search for a Specific User

(1) Enter their name in the **Search** field or scroll through the list of names.

### View Staff’s Portal Information

(2) Click the staff member’s name.

### Suspend a Contractor’s Enterprise Portal Account and All Integrated Applications Access

(3) Click the **Suspend** link in the contractor’s row. Enterprise Portal account suspension for an HHS employee must be done through CAPPS.

### Designate a Staff Member as a Delegate

(4) Click **Delegate** in that staff member’s row.

### View the Delegation Schedule

(5) Click the **View Delegation Schedule** button at the top of the screen. See Assigning Delegates to learn more about managing delegates.

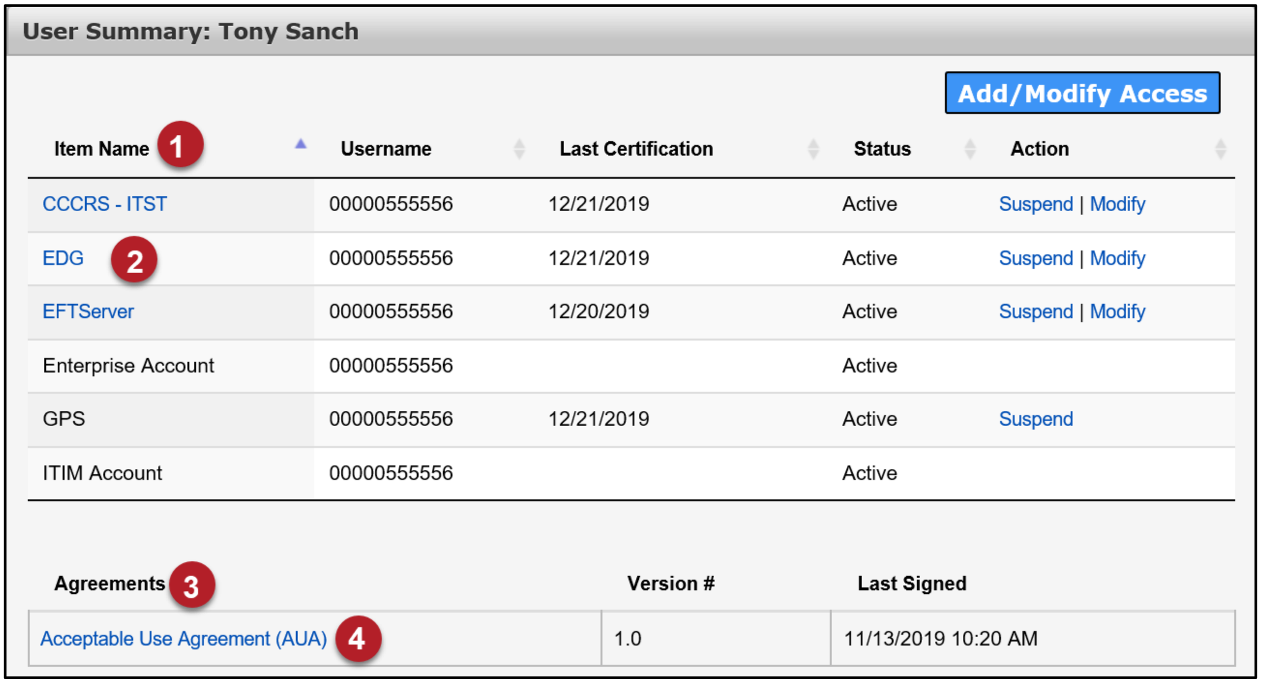
### View and Manage Staff Access

(6) Click the **Manage Access** link in the staff member’s row to open the **User Summary** screen.

## User Summary Screen

Some users may have multiple accounts for one application. Look at the username listed in each application’s row to help you keep track of which account you are reviewing. The user’s name appears at the top of the screen for the user you are looking at. If there is no username listed, you are looking at your own **User Summary** screen.

**Figure 3. User Summary Screen**


User Summary: Tony Sanch

Add/Modify Access

| Item Name | Username | Last Certification | Status | Action |
|---|---|---|---|---|
| CCCRS - ITST | 00000555556 | 12/21/2019 | Active | Suspend \| Modify |
| EDG | 00000555556 | 12/21/2019 | Active | Suspend \| Modify |
| EFTServer | 00000555556 | 12/20/2019 | Active | Suspend \| Modify |
| Enterprise Account | 00000555556 | | Active | |
| GPS | 00000555556 | 12/21/2019 | Active | Suspend |
| ITIM Account | 00000555556 | | Active | |

| Agreements | Version # | Last Signed |
|---|---|---|
| Acceptable Use Agreement (AUA) | 1.0 | 11/13/2019 10:20 AM |

## View List of Applications and their Status

(1) Applications are listed under **Item Name**. Each row includes:

- Your staff member's username for the application
- Date the last certification was completed.
- The user's access status for that application.

## View Access Details

(2) Click the **Item Name**.

## View List of Agreements

(3) **Agreements** for which your username has signed are listed at the bottom of the screen.

## Review Agreement Content

(4) Click the hyperlinked name of the agreement. You can also download or print the agreement after it is open.

**Figure 4. User Summary Screen**

**User Summary: Jane Hostly**

**Add/Modify Access**

| Item Name | Username | Last Certification | Status | Action |
|---|---|---|---|---|
| BusinessObjects MBOW | 12345000001 | 11/05/2020 | Active | Modify |
| CAPPS FIN | 12345000001 | 01/23/2020 | Inactive | |
| EDG | 12345000001 | 02/28/2020 | Active | Suspend \| Modify |
| Enterprise Account | 12345000001 | | Active | |
| IDDI Analytics Dashboard | 12345000001 | 12/04/2020 | Active | Suspend \| Modify |
| ITIM Account | 12345000001 | | Active | |
| LIS | 12345000001 | 04/02/2020 | Inactive | Restore |
| PMAS - Performance Management Dashboard | 12345000001 | 10/30/2020 | Active | Suspend \| Modify |
| WORx | TestWorxJH2 | 02/26/2020 | Inactive | Restore |

| Agreements | Version # | Last Signed |
|---|---|---|
| TEXAS WORKFORCE COMMISSION | 1.0 | 01/06/2020 03:25 PM |

## Suspend User's Access

(5) Click **Suspend** in the application's row.

Immediate suspension occurs only for applications that are fully integrated into the portal. For applications that require manual provisioning, additional time is necessary before the suspension can take effect and the status is updated. The status of the access will change from **Active** to **Inactive** after the suspension request is complete.

## Restore User's Access

(6) Applications with a suspended status have the option to restore them. Click the **Restore** option to restore access. The status of the access will change from **Inactive** to **Active** once the restore is complete.

## Modify User Access for a Specific Application

(7) Click **Modify** in the application's row to open the **Review Orders** screen.

## Add Access for the User/Modify User Access for Multiple Applications

(8) Click **Add/Modify Access** at the top of the screen to open the **Select Items** screen.

# Review an Existing Staff Member's Access Request

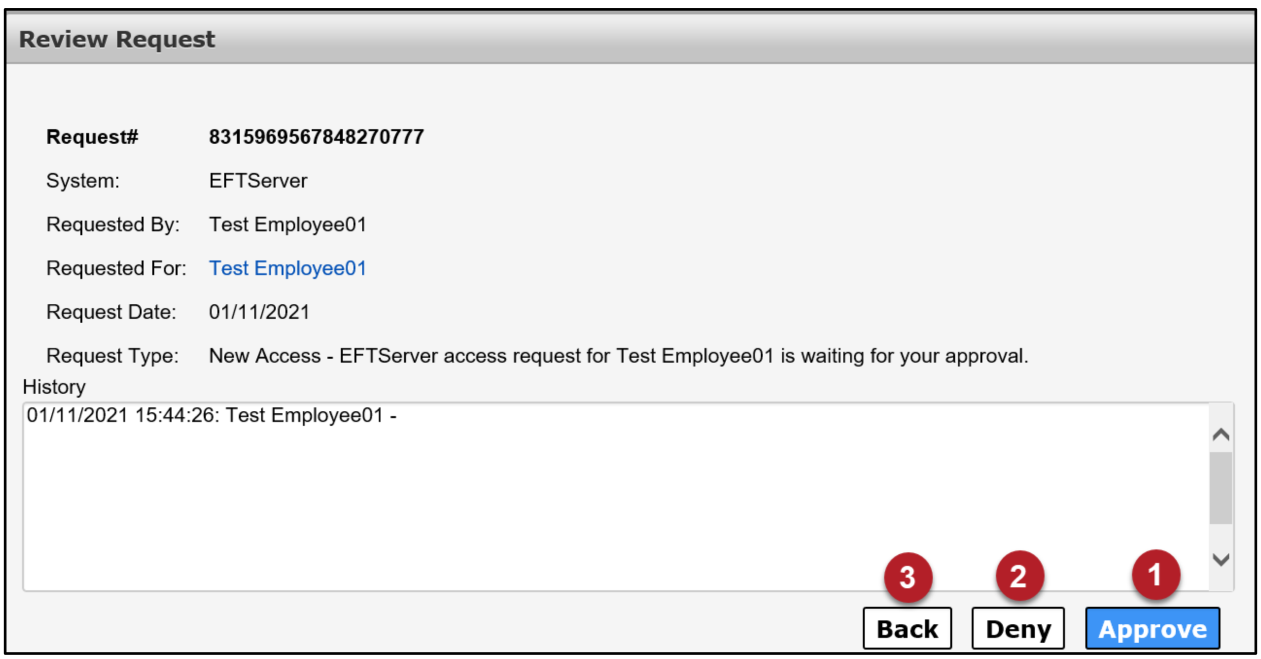
A notification appears on the HHS Enterprise Portal Dashboard when a staff member submits an access request. Click **Review Request** inside the notification to open request details.

At a minimum the standard **Review Request** screen displays the following:

- Request Number
- Name of Application
- Requester
- Recipient of the Access Request
- Request Date
- Request Type
- History of actions performed against the request.

Other fields are available depending on the user and request type. If you are supervising contractors, you also approve their profile from this page.

**Figure 5. Review Request Screen**




## Approve Access Request

(1) Some requests allow you to edit the selections before approving. Click **Approve** to open the **Add Details** window. Entering details is not required if you are approving the request. Click **OK** to complete the approval. Click **Back** to exit the request without performing an action. You have ten days to perform an action on a request. If you do not act on a request within ten days, the system cancels the request and the requester will have to resubmit the request.

## Deny Access Request

(2) Click **Deny** to open the **Add Details** window. Details are required to deny the request. Enter the details on the **Notes** screen. Click **OK** to complete the denial. Click **Back** to exit the request without performing an action. You have ten days to perform an action on a request. If you do not act on a request within ten days, the system cancels the request and the requester will have to resubmit the request.

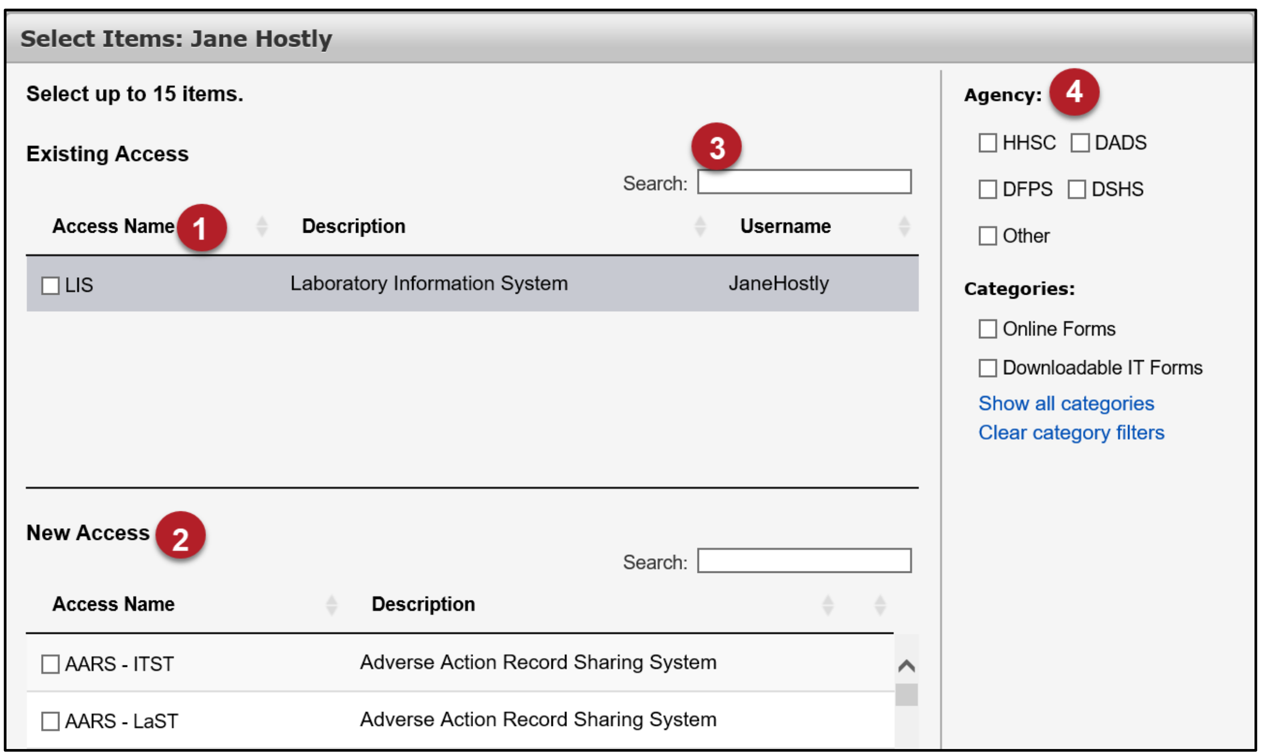
(3) Click the **Back** button to go back to the **Notifications** screen without taking an action.

## Request New or Modified Access for a Staff Member

(1) Items for which the staff currently has access are listed in the top highlighted rows of the **Select Items** screen, under the heading **Existing Access**. Click these items to modify existing access. Use the horizontal scroll bar to view the staff member's name for a specific application. Click items in these rows to restore or suspend access to these applications.

(2) Items in non-highlighted rows, under the section titled **New Access**, represent applications for which the user does not have access. Click these items to request new access for the user.

**Figure 6. Select Items Screen**




(3) Enter text in the **Search** field to find a specific application.

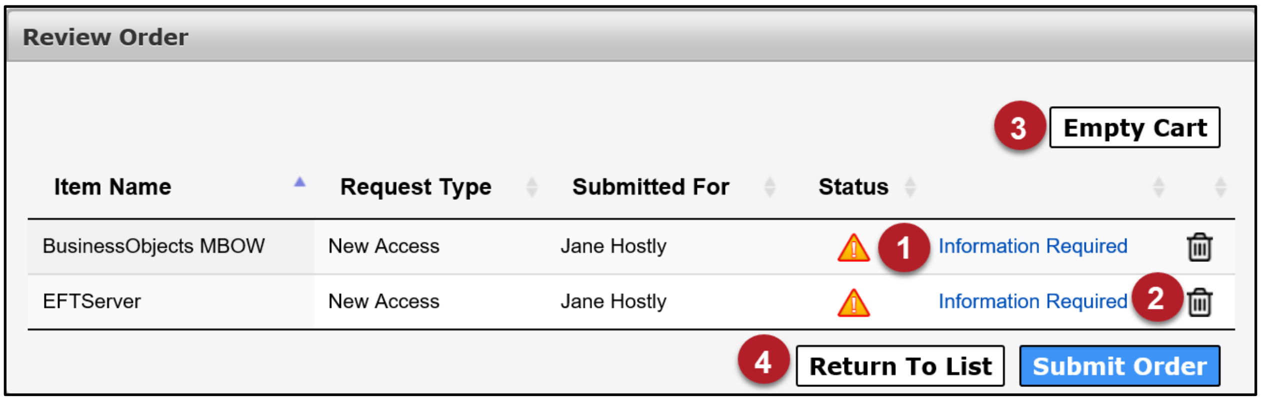
(4) You may also take advantage of the filter options to narrow your results.

(5) Click **Next** when you have completed making your selections.

## Review Order Screen

(1) On the **Review Order** screen, click the **Information Required** links to provide the necessary information. The process for providing this information varies depending on the application.

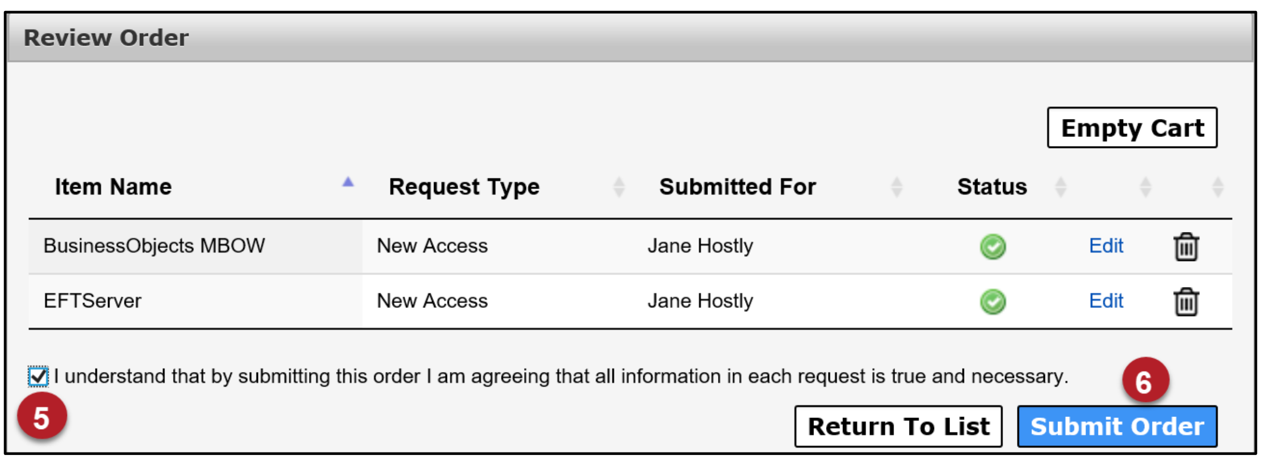
**Figure 7. Review Order Screen**




Other Actions:

- (2) Click the **trashcan** icon to remove a single item from your cart.
- (3) Click **Empty Cart** to remove all items from your cart.
- (4) Click **Return to List** to return to the **Select Items** screen to add more items to your cart.

**Figure 8. Review Order Screen**




(5) After you have entered the required information for all items in your cart, a confirmation/submission message opens. Read and click the box beside the message to agree to its terms.

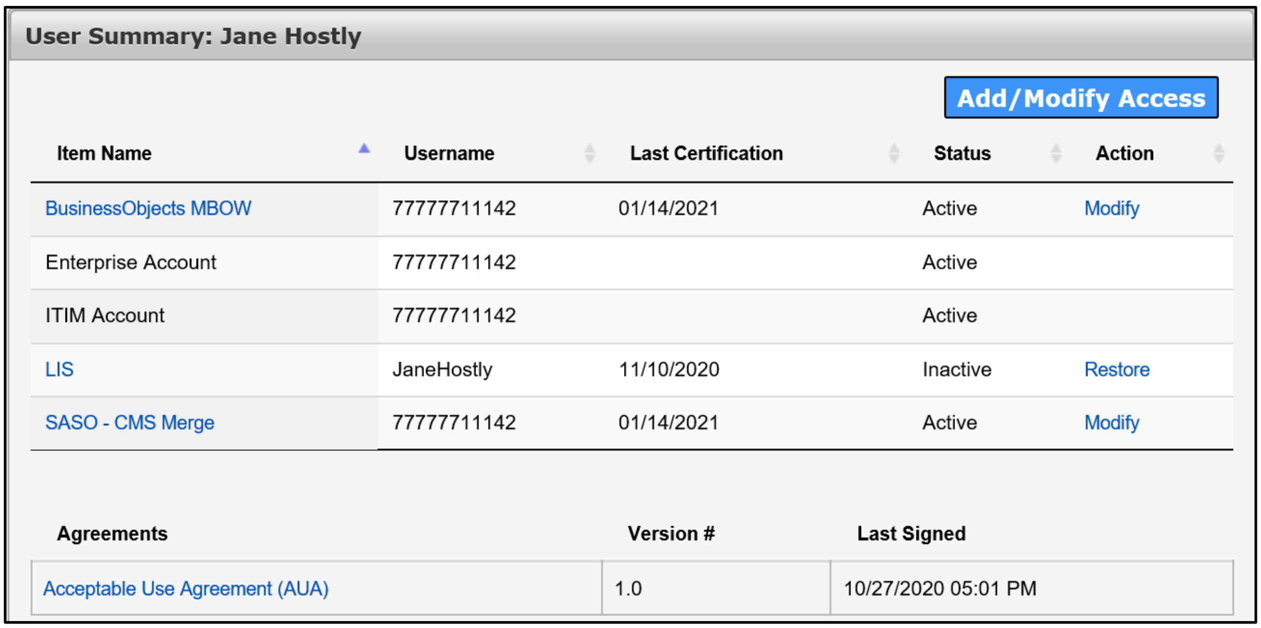
(6) Click **Submit Order** to finalize the request. See the [Review Orders and Requests] section for more information.

You will receive an update via Enterprise Portal **Notifications** and an email within 10 days of submitting the order. You may also review updates at any time by clicking the **My Orders** link at the top right of the screen. See Review Orders and Requests for more information.

## Remove Access

1. Click on **Manage Staff** under **Staff Management** on left menu.
2. Search or scroll through the list of employees to find the person for which you wish to remove access.
3. Click **Manage Access** in the staff member's row to open the **User Summary** screen.

**Figure 9. User Summary Screen**



User Summary: Jane Hostly

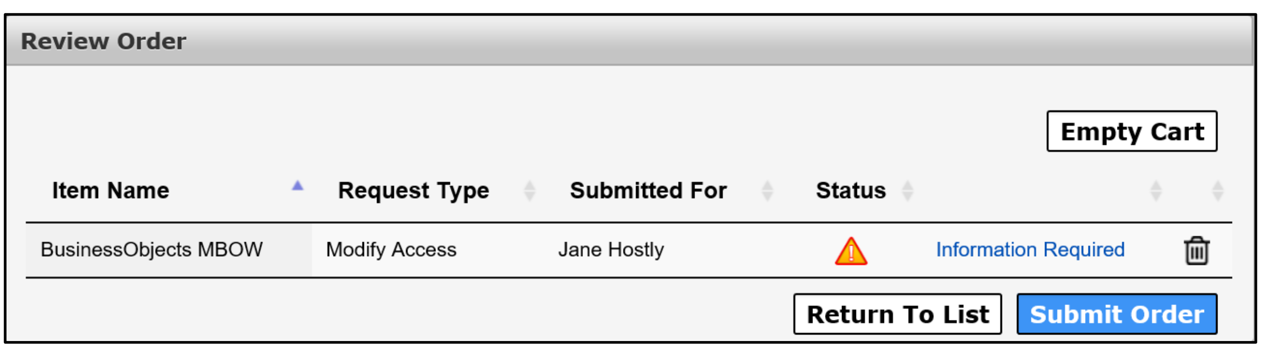
Add/Modify Access

| Item Name | Username | Last Certification | Status | Action |
|---|---|---|---|---|
| BusinessObjects MBOW | 77777711142 | 01/14/2021 | Active | Modify |
| Enterprise Account | 77777711142 | | Active | |
| ITIM Account | 77777711142 | | Active | |
| LIS | JaneHostly | 11/10/2020 | Inactive | Restore |
| SASO - CMS Merge | 77777711142 | 01/14/2021 | Active | Modify |

| Agreements | Version # | Last Signed |
|---|---|---|
| Acceptable Use Agreement (AUA) | 1.0 | 10/27/2020 05:01 PM |

4. Click **Modify** in the appropriate row to open the **Review Orders** screen. Note: A pop-up window will open asking if you want to proceed. Click **Yes**.

**Figure 10. Review Order Screen**



Review Order

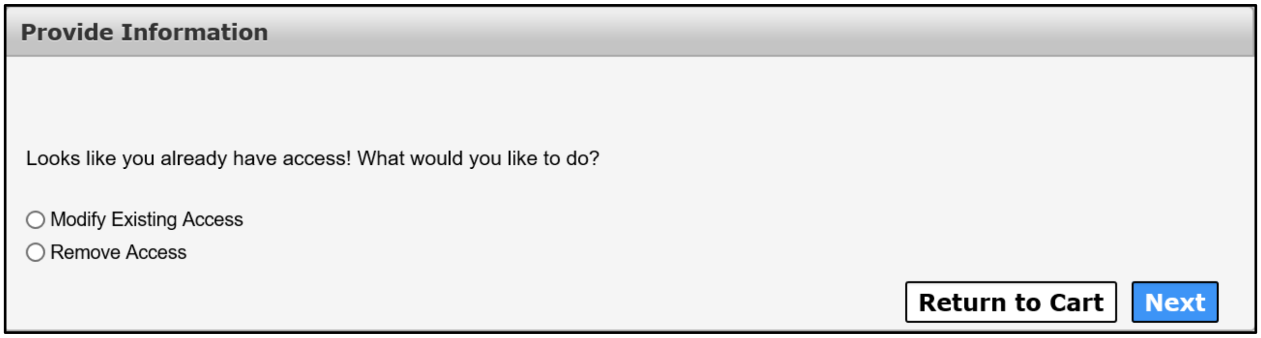
Empty Cart

| Item Name | Request Type | Submitted For | Status | | |
|---|---|---|---|---|---|
| BusinessObjects MBOW | Modify Access | Jane Hostly | | Information Required | |

Return To List Submit Order

5. Click the **Information Required** link to open the **Provide Information** screen.

**Figure 11. Provide Information Screen**




6. Select **Remove Access**.
7. Click **Next** to select a date for the removal.
8. Click **Next** to open the **Review Order** screen.
9. Click the confirmation message.
10. Click **Next**. The employee's access will be removed on the date specified.

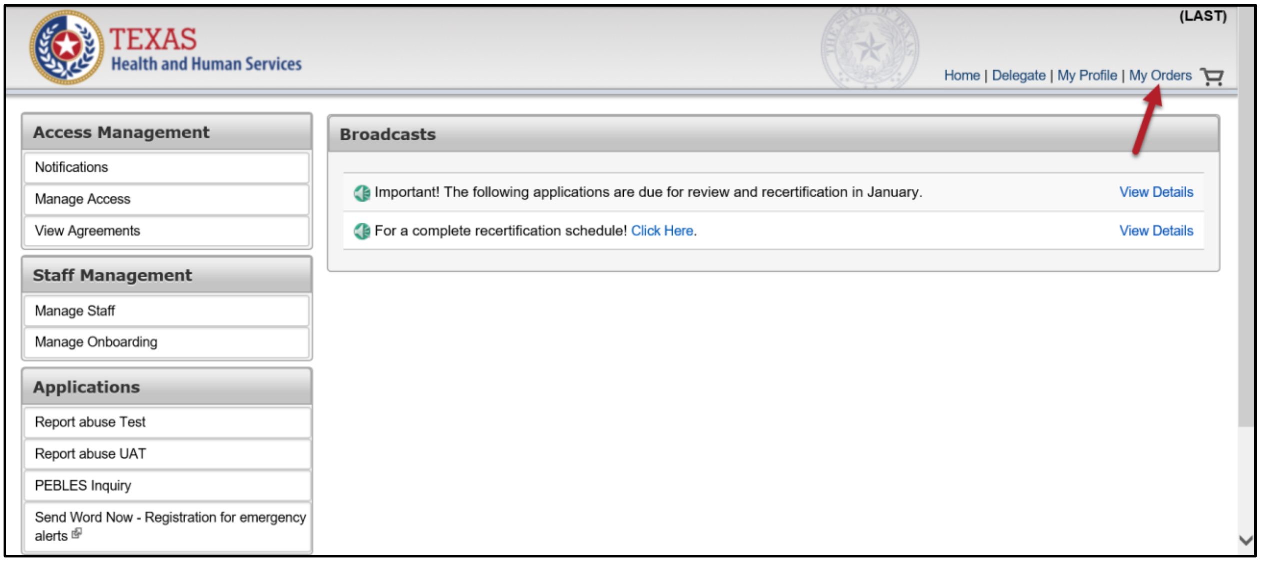
# Review Orders and Requests

## How is an Order different than a Request?

An **Order** defines the collection of items that you have requested access to in one submission and is given an order number. Each item in that order is a **Request** and is given an individual **Request Number**.

When an update has been made to your order, you are informed via email and **Enterprise Portal Notifications**. You can also check the status of your order and requests by Clicking the **My Orders** link at the top right of any Enterprise Portal screen.

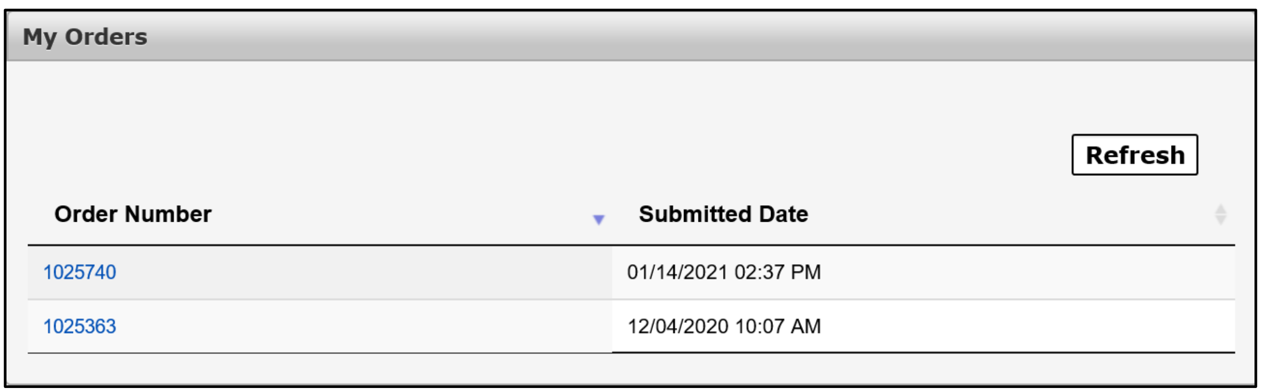
**Figure 12. HHS Enterprise Portal Dashboard**




## My Orders Screen

Orders that you created within the last six months are displayed, starting with the most recent. You can rearrange the order from oldest to newest by clicking the arrows beside **Order Number** or **Submitted Date**. If the status is **In Progress**, you also have the option to cancel the order. Click the **Order Number** to view details about a specific order.

**Figure 13. My Orders Screen**




## Order Details Screen

Order **Details** include the request number, item name, request type, who the request was submitted for, the order status, and actions taken against the request. Click the **Request Number** in a row to view more information.

**Figure 14. Order Details Screen**

**Order Details**

**Order Number:** 1025740

| Request Number | Item Name | Request Type | Submitted For | Status | Actions |
|---|---|---|---|---|---|
| 188712561819169137 | LIS | Restore Access | Jane Hostly | In Progress | Cancel |

**Back**

## Request Details Screen

**Request Details** include the history, received/completed date, who the request was completed by, and status. Click **Details** in the row of an activity to learn more information about that activity.

**Figure 15. Request Details Screen**

**Request Details for: 188712561819169137**

| | Request Activity | Received Date | Completed Date | Completed By | Status |
|---|---|---|---|---|---|
| Details | Restore Access | 01/14/2021 02:37 PM | | | |
| | Manual Provisioning for Restore Request | 01/14/2021 02:38 PM | | | PENDING |

**Back**

# Assigning Delegates

The HHS Enterprise Portal allows you to delegate certain tasks to your specific staff members.

As a supervisor, you receive access requests from the Enterprise Portal which require attention within a designated period. When you do not perform actions on these requests, the request is cancelled, and the requester must request the access again which can be time consuming.

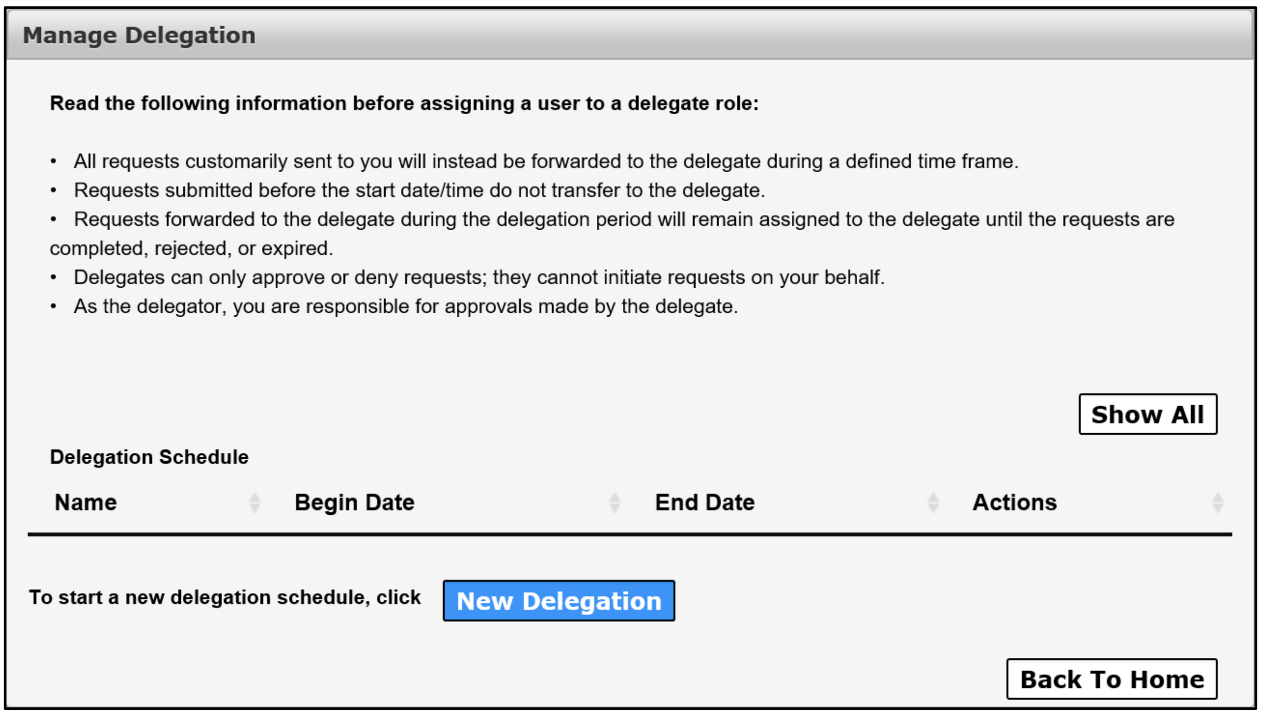
The Enterprise Portal's delegation feature allows you to delegate a staff member to perform your tasks during periods when you are unavailable (i.e., sick, vacation, etc.).

It is important to keep the following points in mind when assigning a delegate:

- Assigning a delegate means all requests customarily sent to you will instead be forwarded to the delegate during a defined timeframe.

- Requests submitted before the start date/time do not transfer to the delegate.
- Requests forwarded to the delegate during the delegation period will remain assigned to the delegate until the requests are completed, rejected, expired.
- Delegates can only approve or deny requests; they cannot initiate requests on your behalf.
- Delegates can recertify staff access.
- As the delegator, you are responsible for actions taken by the delegate.
- The delegation periods last up to 180 days. To extend the date past the 180-day mark, change the end date after the delegation period has started.

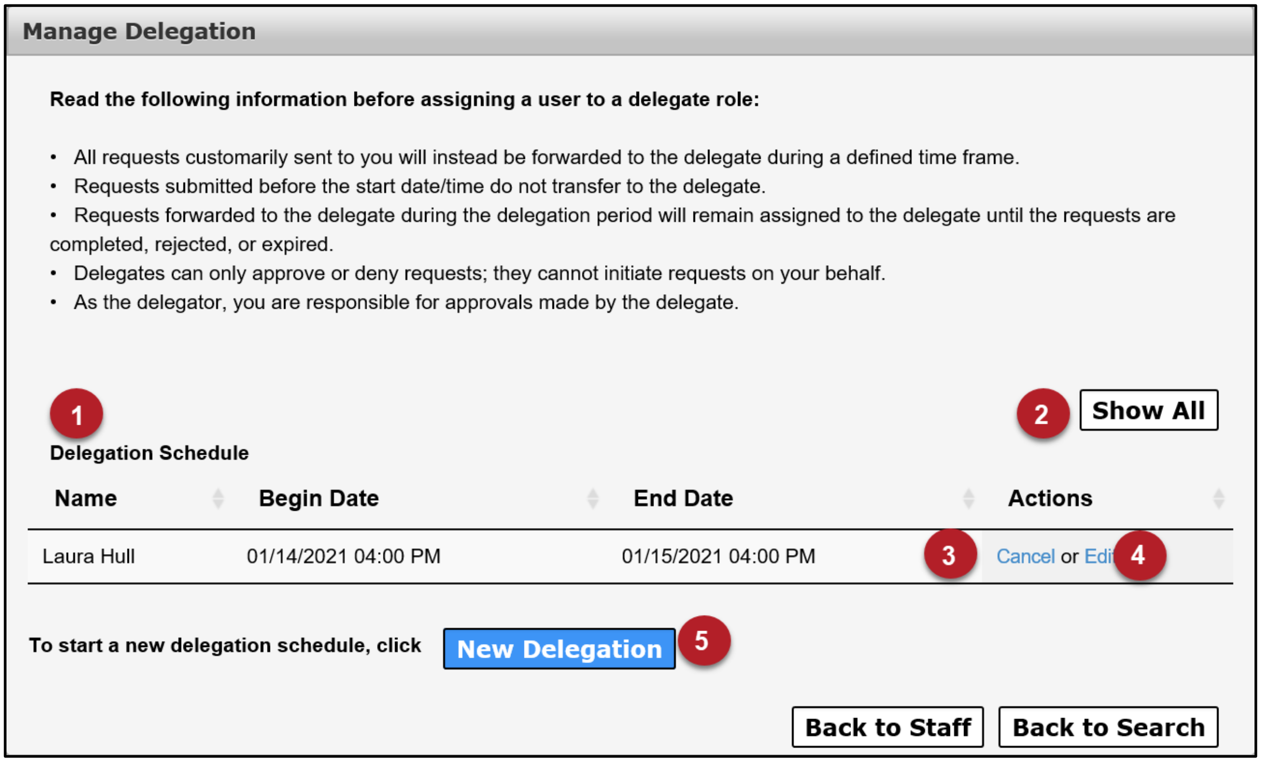
**Figure 16. Manage Delegation Screen**




## Delegation Screen

(1) A list of current delegates and their delegation periods are shown on the Manage Delegation screen.

**Figure 17. Delegation Assignment Screen**




## View Previous Delegation Assignments

(2) Click **Show All**.

## Cancel a Delegation Assignment

(3) Click **Cancel** under **Actions** in the row of the assignment that you wish to cancel. Be certain you want to cancel the delegation before you click **Cancel** as this action cannot be undone.

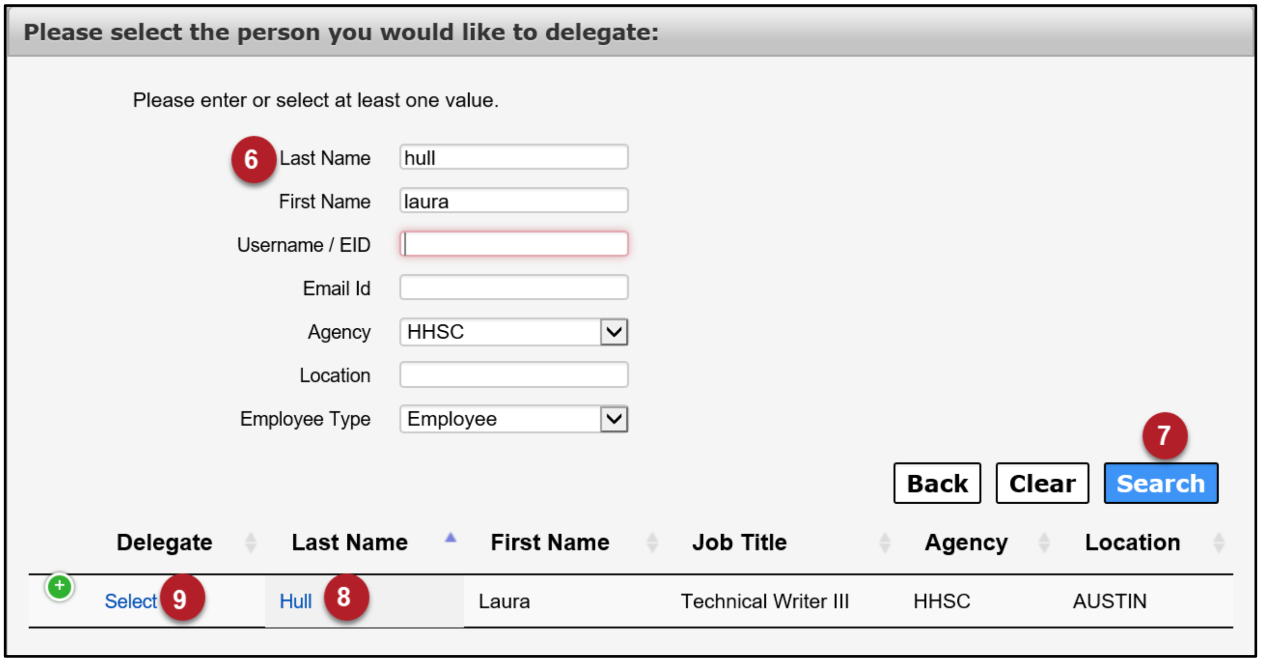
## Edit a Delegation Assignment

(4) Click **Edit** under **Actions** in the row of the assignment that you wish to edit. This action opens the **Delegation Details** screen where adjustments are made.

## Create a New Delegation Assignment

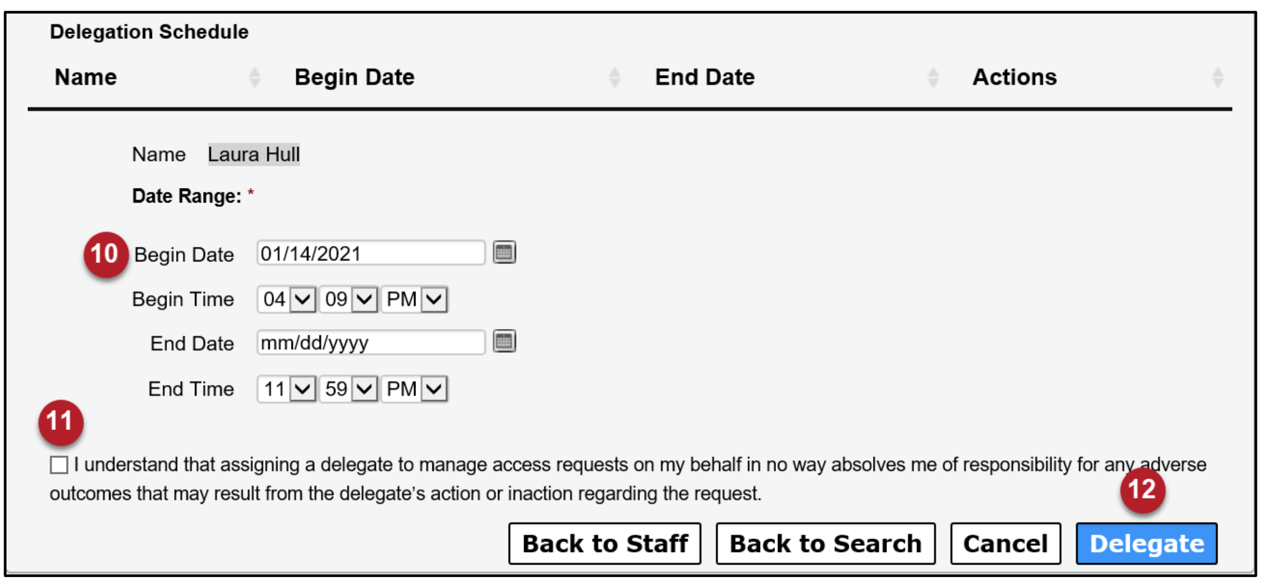
1. Click the **New Delegation** button to open the **Delegate Search** screen (5).

**Figure 18. Delegate Search Screen**




2. Complete search criteria in the search criteria fields (6).
3. Click **Search**. A list of search results is returned (7).
4. Click the delegate's last name to view their information. This ensures you are selecting the correct individual (8).
5. Click **Select** in their row (9).

**Figure 19. Delegation Details Screen**




6. Click the **start/end** dates and times in the fields provided (10).
7. Review the agreement and check beside it to agree to its terms. The **Delegate** button is available once the agreement has been checked (11).

8. Click **Delegate** to finalize the assignment (12).