Okta MFA Portal User Guide

COB Smart Portal Okta Multifactor Authentication (MFA)

- This new feature will allow participating organizations to adopt additional security measures and make the information in the COB Smart Portal more secure.
- Users will have a faster, more streamlined, and more self-service login
- MFA allows for a more customizable login experience
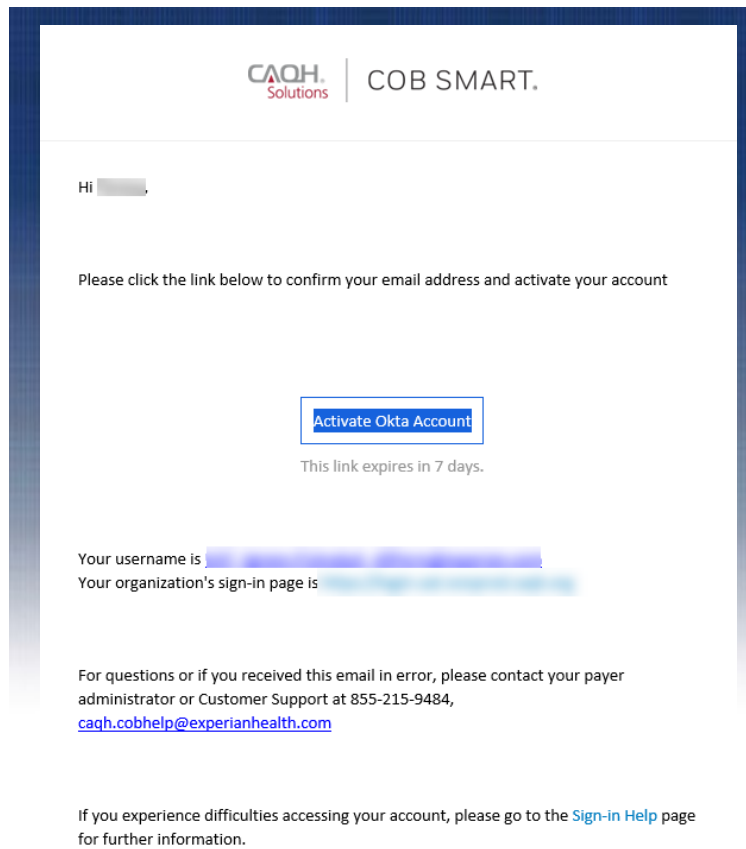
This Guide Will Cover

Okta MFA Account Registration

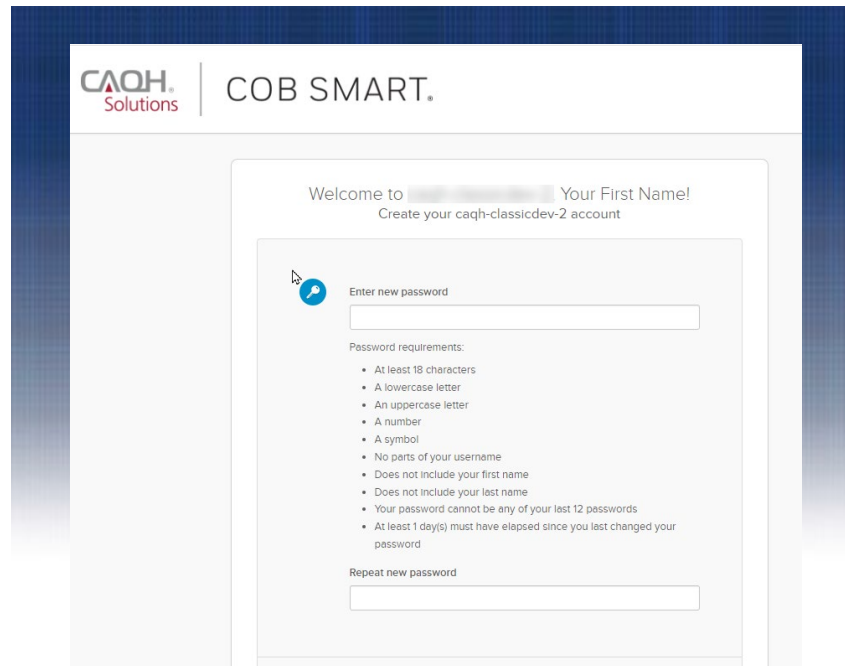You will receive an email with a link to register your account within Okta to access the portal.

NOTE: If you cannot locate the Okta registration email, please check your junk or spam folder. If you have not received your registration email, please contact your administrator.

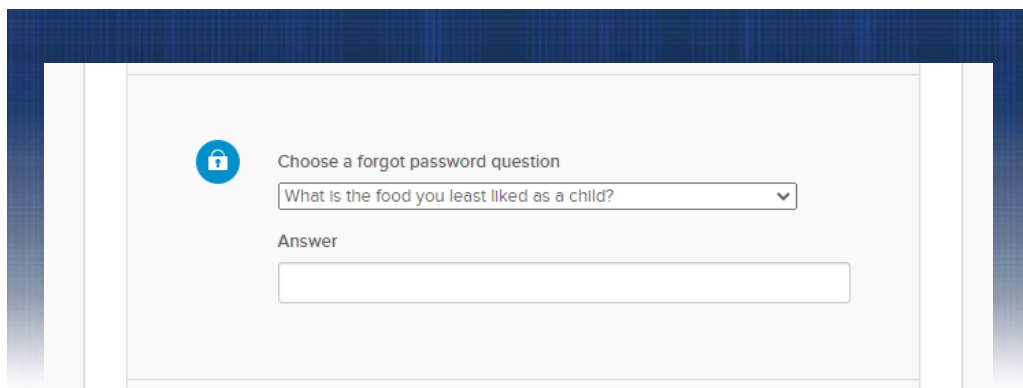To activate your Okta Account please complete the following:

Step 1: Click the *Activate Okta Account* button. This link will expire in 7 days.

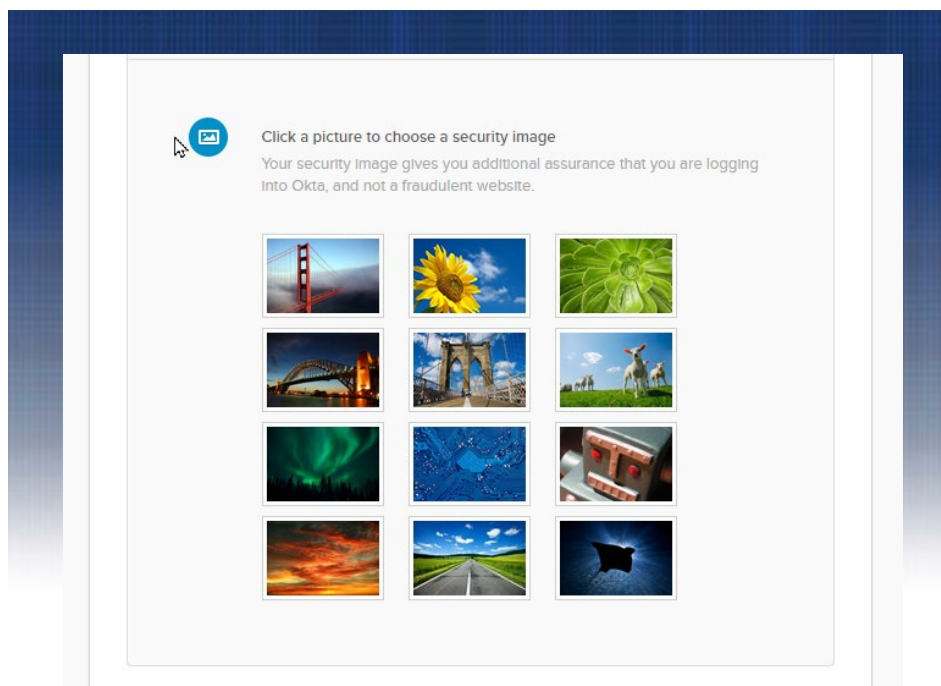Step 2: Create your password. Password requirements can be found on the screen and here.

Step 3: Create a forgot password question.

Step 4: Choose a security image.

Step 5: Click *Create My Account*.
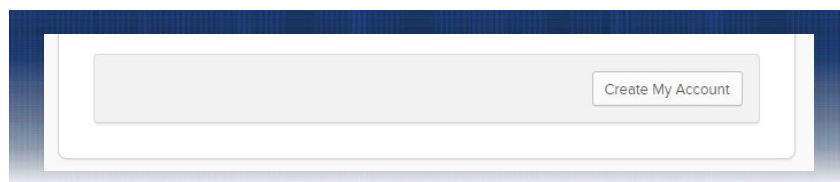
Step 6: Click **Send me the code** – this will send a 2-factor code to the email address on your account. This will allow you to sign into Okta and then the **COB Smart Portal**.
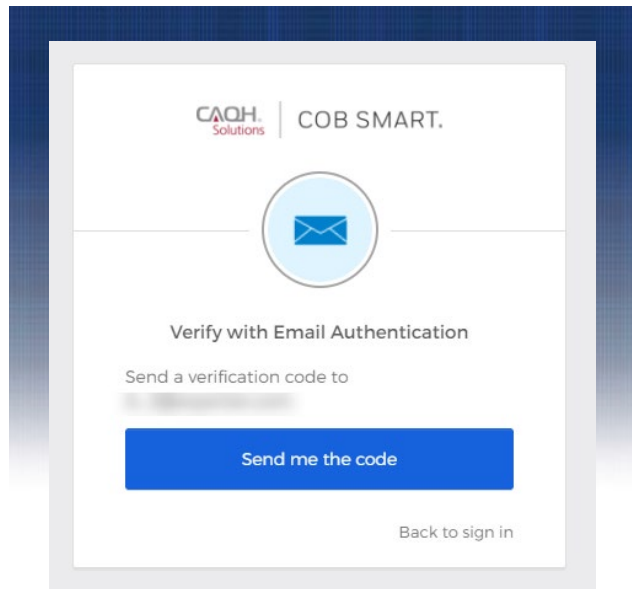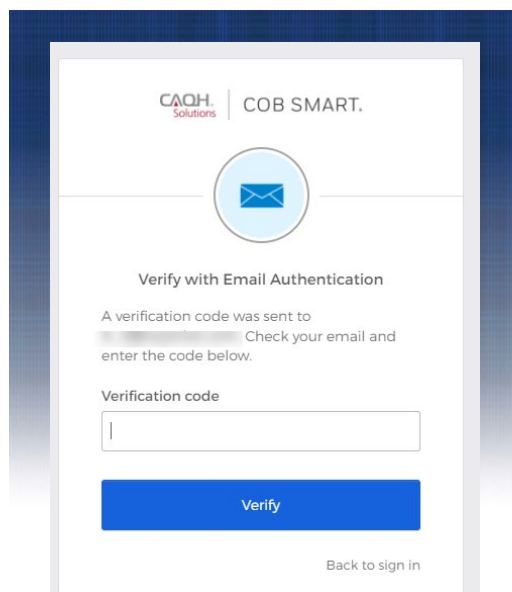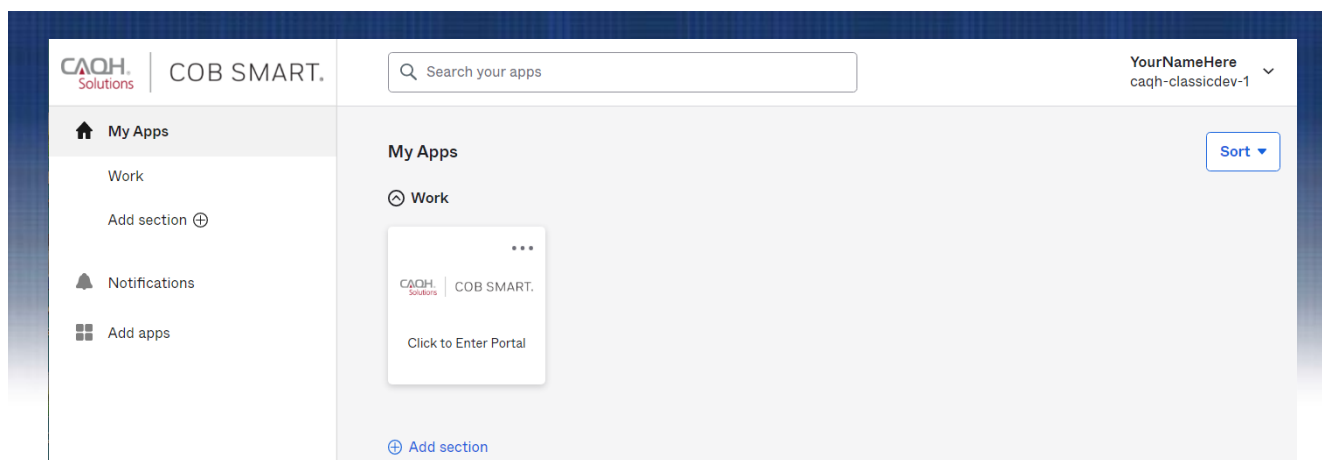

Step 7: Input the code you received via email and click **Verify**.

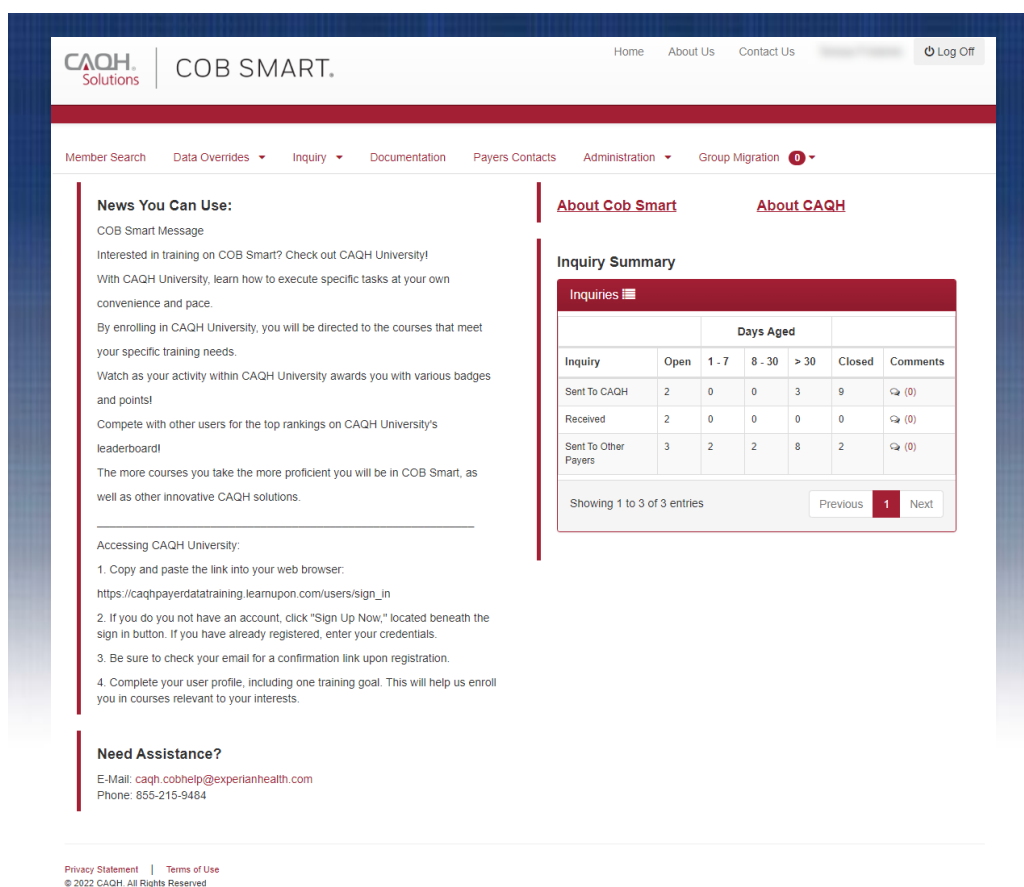**NOTE:** The verification code will expire after 10 minutes.

Step 8: Click the **COB Smart Portal** application icon to sign into the **COB Smart Portal**.

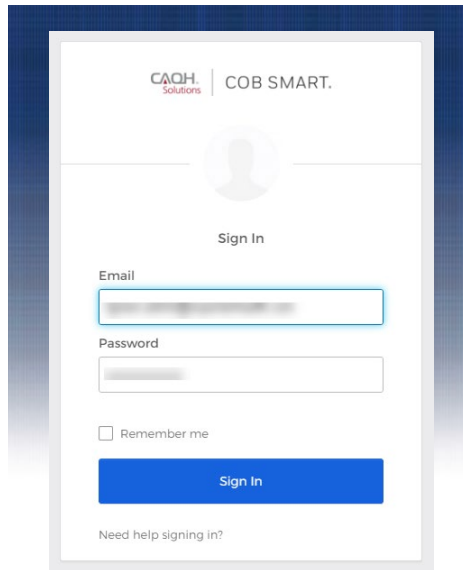

You will be taken into the **COB Smart Portal**.

NOTE: The example of the **COB Smart Portal Home Screen** displays access for a Payer Administrator. Payer Analysts may have fewer options available based on their permissions provisioning.

How to log in to the *COB Smart Portal*

After your Okta MFA account has been activated, you may continue to log in to the portal using your existing bookmarks or the portal URL.

Step 1: Go to URL: https://cob.caqh.org/

Step 2: Input your **Email** address and **Password** then click **Sign In**.
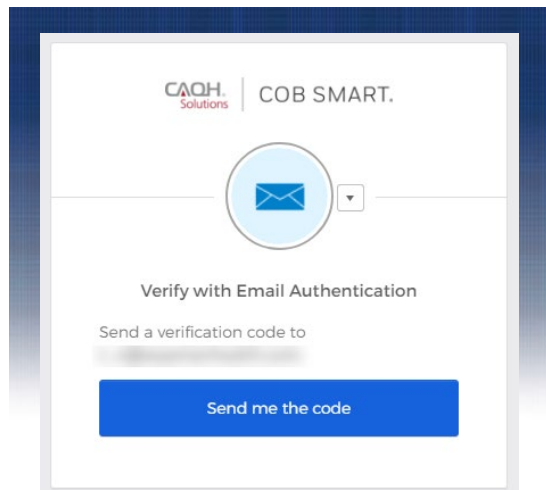
Step 3: Click **Send me the code** button. This will send you an email with your 2-factor authentication code.
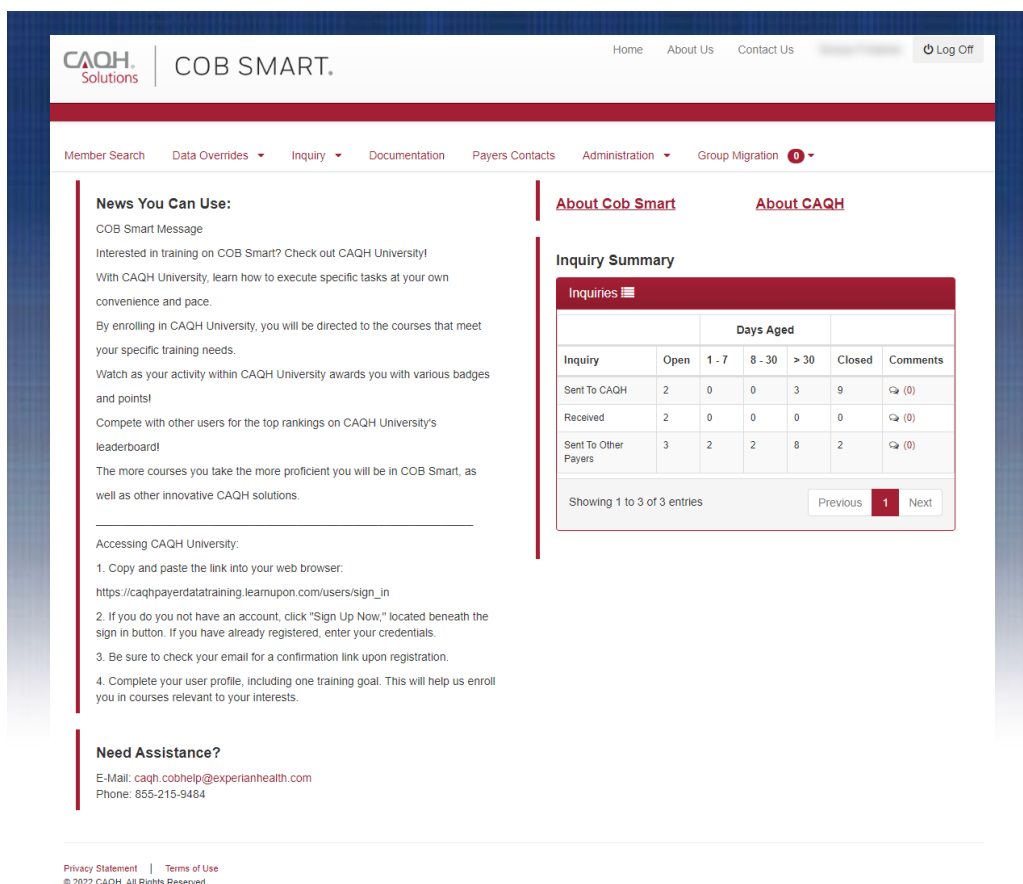
Step 4: Input the code and click *Verify*.

NOTE: **The verification code expires after 10 minutes**. If you don't enter a verification code after 3 minutes you will be prompted to resend the authentication email, or you can re-enter your password to send a new email with a 2-factor authentication code.

Verify with Email Authentication

A verification code was sent to ▓▓▓▓▓▓▓▓▓▓▓▓▓. Check your email and enter the code below.

> ⚠ Haven't received an email? Send again

Verification code

[   ]

Verify

You will be taken into the *COB Smart Portal*.

Home   About Us   Contact Us   ▓▓▓▓▓▓   ⏻ Log Off

Member Search   Data Overrides ▼   Inquiry ▼   Documentation   Payers Contacts   Administration ▼   Group Migration 0 ▼

News You Can Use:

COB Smart Message

Interested in training on COB Smart? Check out CAQH University!

With CAQH University, learn how to execute specific tasks at your own convenience and pace.

By enrolling in CAQH University, you will be directed to the courses that meet your specific training needs.

Watch as your activity within CAQH University awards you with various badges and points!

Compete with other users for the top rankings on CAQH University's leaderboard!

The more courses you take the more proficient you will be in COB Smart, as well as other innovative CAQH solutions.

Accessing CAQH University:

1. Copy and paste the link into your web browser:

https://caqhpayerdatatraining.learnupon.com/users/sign_in

2. If you do you not have an account, click "Sign Up Now," located beneath the sign in button. If you have already registered, enter your credentials.

3. Be sure to check your email for a confirmation link upon registration.

4. Complete your user profile, including one training goal. This will help us enroll you in courses relevant to your interests.

Need Assistance?

E-Mail: caqh.cobhelp@experianhealth.com
Phone: 855-215-9484

About Cob Smart   **About CAQH**

Inquiry Summary

Inquiry ☰						
			Days Aged			
Inquiry	Open	1 - 7	8 - 30	> 30	Closed	Comments
Sent To CAQH	2	0	0	3	9	☷ (0)
Received	2	0	0	0	0	☷ (0)
Sent To Other Payers	3	2	2	8	2	☷ (0)

Showing 1 to 3 of 3 entries   Previous **1** Next

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Edit User Profile Information

Step 1: To edit your user information, log into the **COB Smart Portal** and click on **your name** located on the right side of the top menu bar.

On the Manage My Account page you can update your user information. Once you have made your changes click **Submit Changes**.

NOTE: To have your email address updated, please have your payer administrator edit your user information from the **Manage User** menu. If a user's email address is changed, they must use the new email address and their old password the next time they log in to the **COB Smart Portal**.

Enroll in SMS Text 2-factor Authentication

SMS Text 2-factor authentication is optional within the portal and Okta. If you wish to enroll, navigate to the **Manage My Account** screen by clicking on your name located on the right side of the top menu bar.

On the **Manage My Account** screen enter a valid **mobile phone** number and click **Submit Changes**. Please read the **CAQH Terms of Service** prior to enrolling in **SMS Text 2-factor authentication**.

Once your mobile number has been entered, you will be able to use SMS Text 2-factor authentication OR email authentication to log into the **COB Smart Portal**.

NOTE: You may at any time remove your mobile number from your account page. This will automatically disable SMS 2-factor authentication on your account.

If you or an administrator removes or changes your mobile number, you will receive an email notification that a security method has been reset.
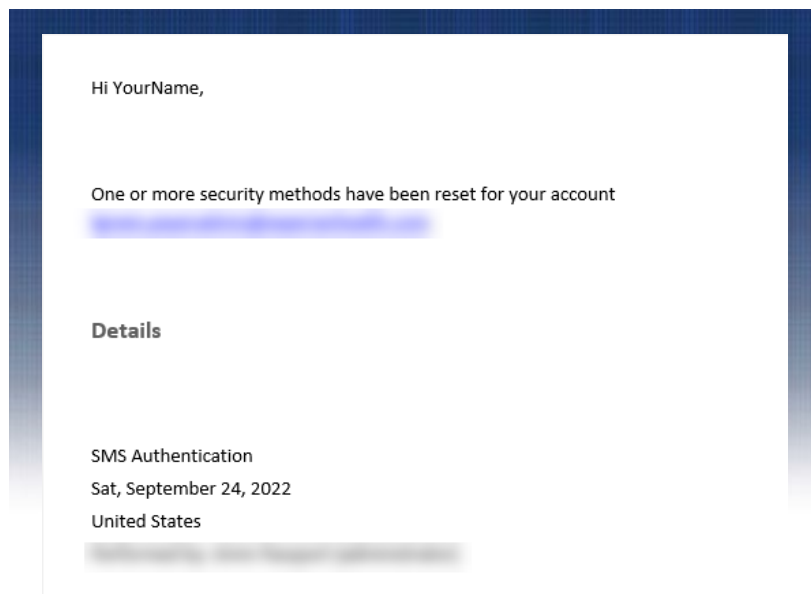

Setting up SMS as an Authentication Factor

To change to using SMS Text navigate to the **COB Smart Portal**, enter your email address and your password, then click the **Sign in** button.
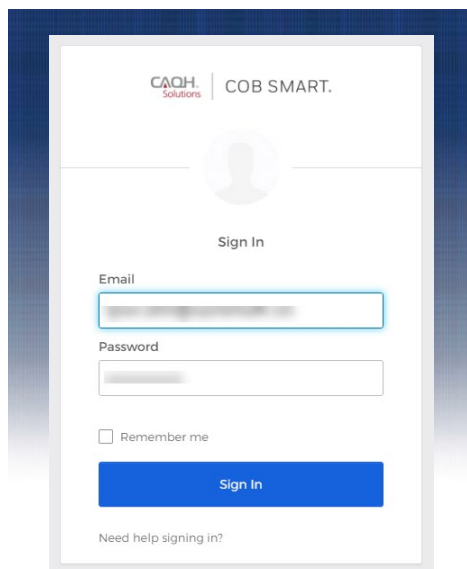
Step 1: On the Verify screen you can select the dropdown to pick email or *SMS Authentication*.

NOTE: Once selected you will automatically see the SMS authentication option the next time you log in to the *COB Smart Portal*. You can change the authentication method back to email at any time using the dropdown menu.
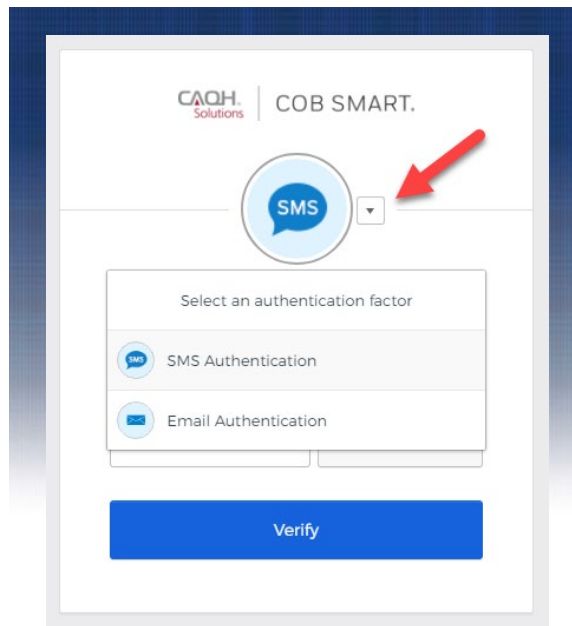
Step 2: Select *SMS Authentication* and click the *Send Code* button.

**NOTE:** You must click send code to receive a new SMS authentication code every time you log in.
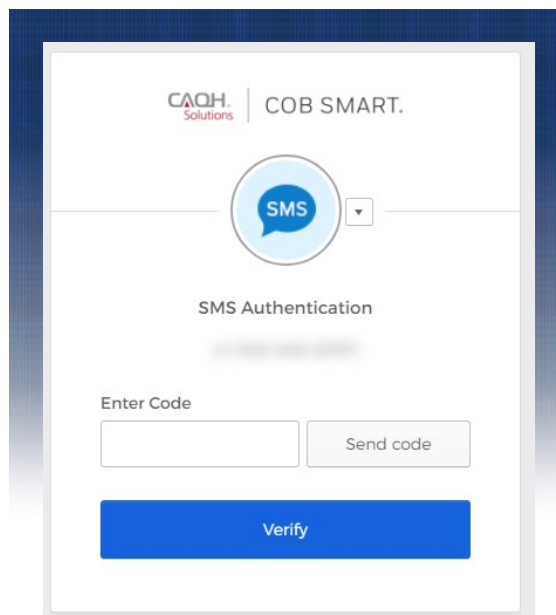
Step 3: Enter the code and click *Verify*. Once verified you will be logged into the *COB Smart Portal.*

NOTE: The verification code will expire after 5 minutes. You may at any time remove your mobile number from your account page. This will automatically disable SMS 2-factor authentication on your account.
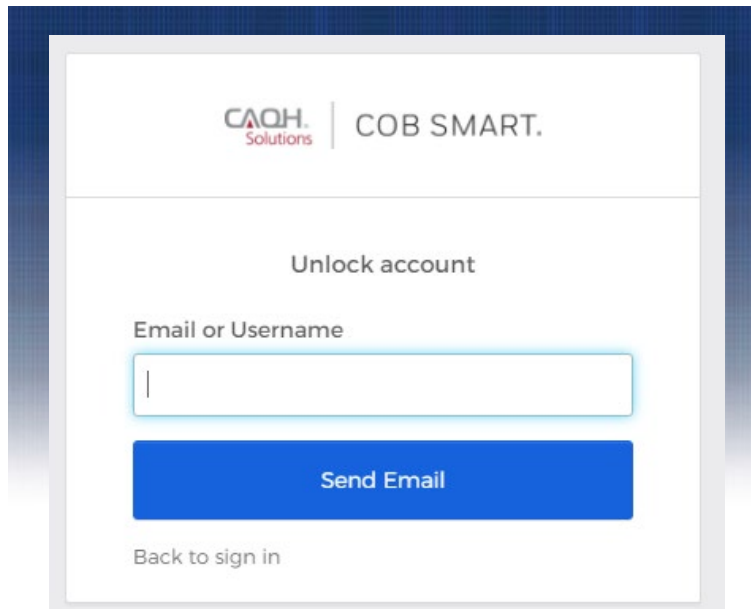
Unlock Account

When logging in to your account, if you enter an incorrect password 5 times, your account will be locked. You may follow the self-help instructions to unlock your account or wait 1 hour for your account to automatically unlock. When your account becomes locked, **Unlock Account** will display, and you will receive an email with a link to unlock your account.
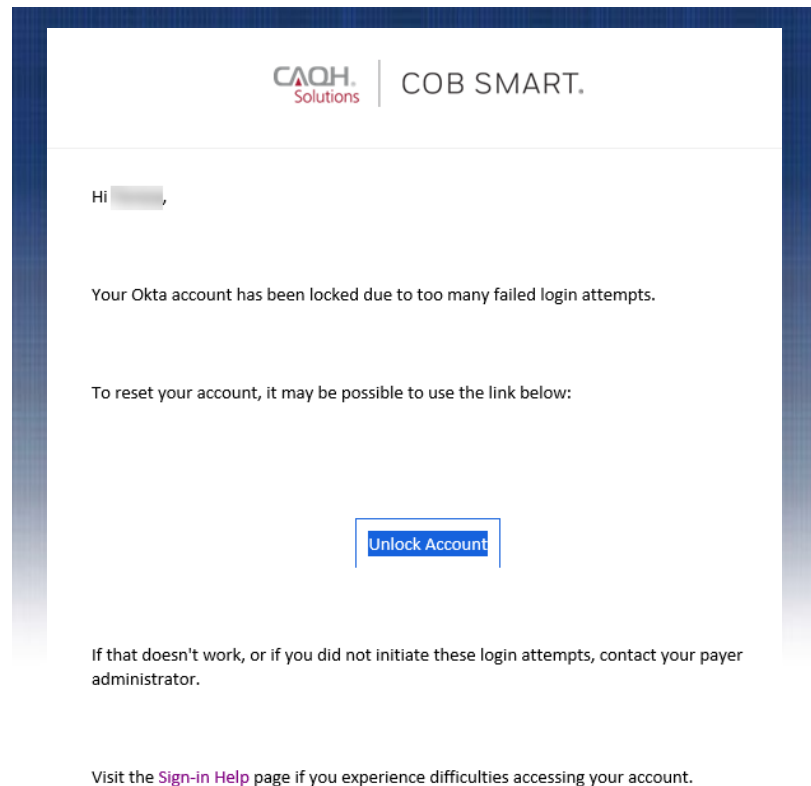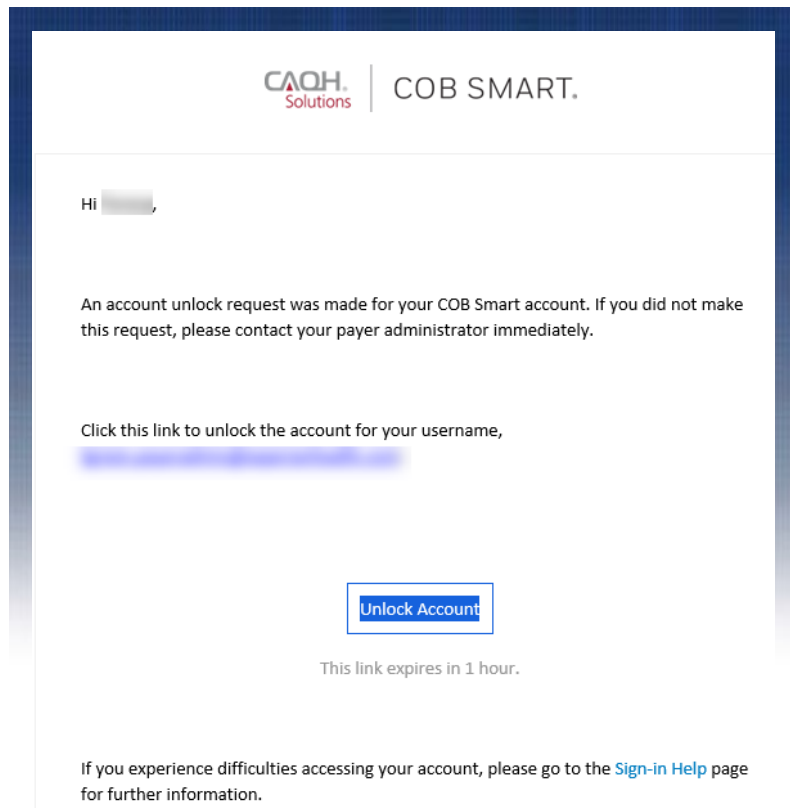

Step 1: If you are not already on the unlock account screen, click the **Unlock Account** link in email.

Step 2: Input the email address for your account and click the **Send Email** button.

You will receive an email stating an unlock request was made.
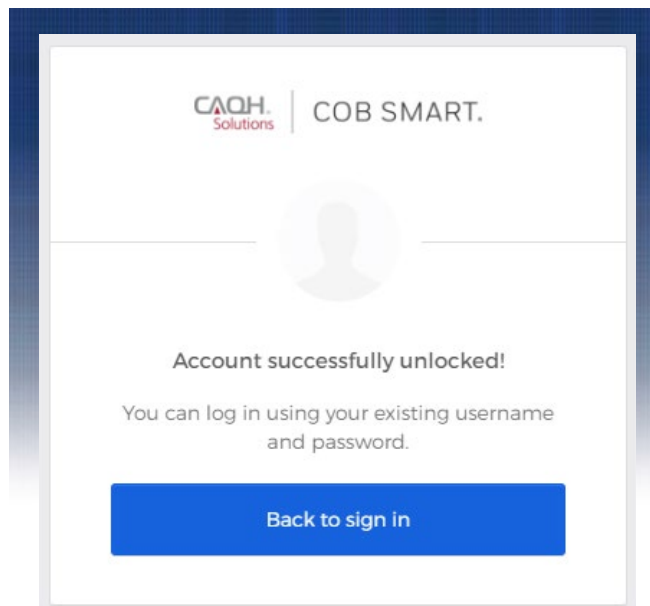

Step 3: Click the **Unlock Account** link in the email.

NOTE: This link expires in 1 hour.

Step 4: Enter the answer your secret question and click the **Unlock Account** button.

You will receive the message that your account has been unlocked. Click the **Back to sign in** button to log into the **COB Smart Portal**. If you are unable to unlock your account, please contact your administrator.
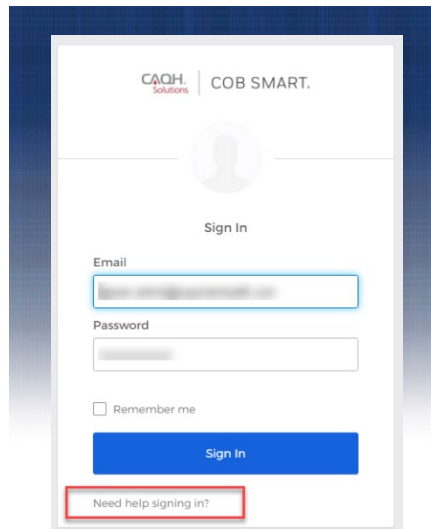
Forgot Password/Reset Password

Once your Okta account is registered, if you forget your password, you can use the self-service **Forgot Password** feature within Okta.
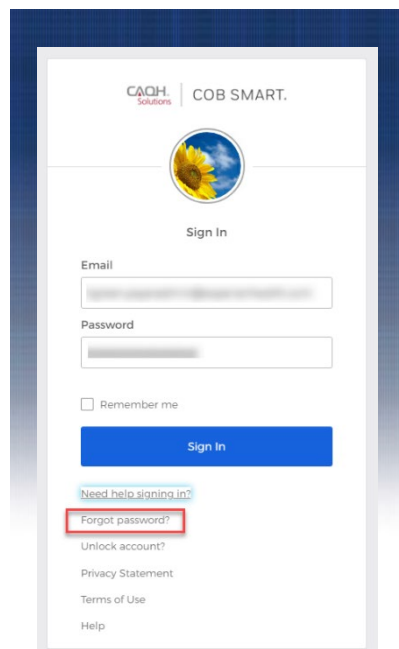
NOTE: **Send Reset Password Request** is also available on the Edit User page.

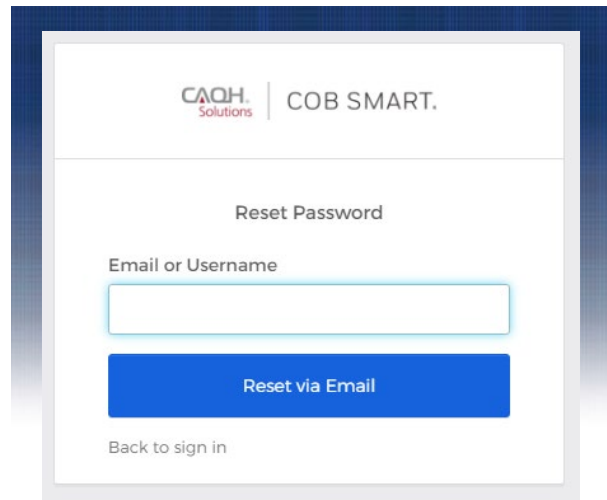Step 1: Go to URL: https://cob.caqh.org/

Step 2: Click **Need help signing in?** located below the Sign In button.

Step 3: Click **Forgot password?** link.

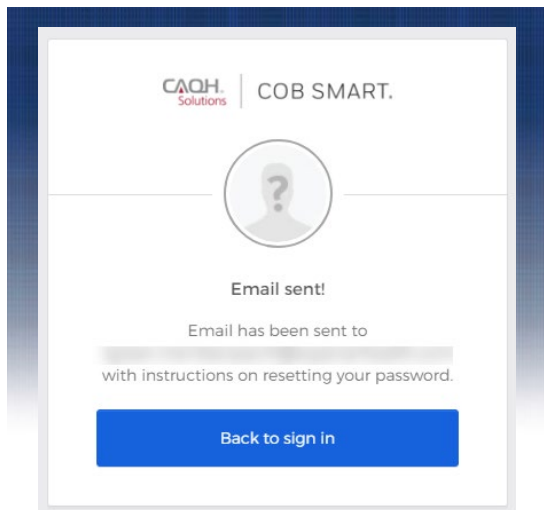Step 4: Input the email address associated with your account and click ***Reset via Email***.
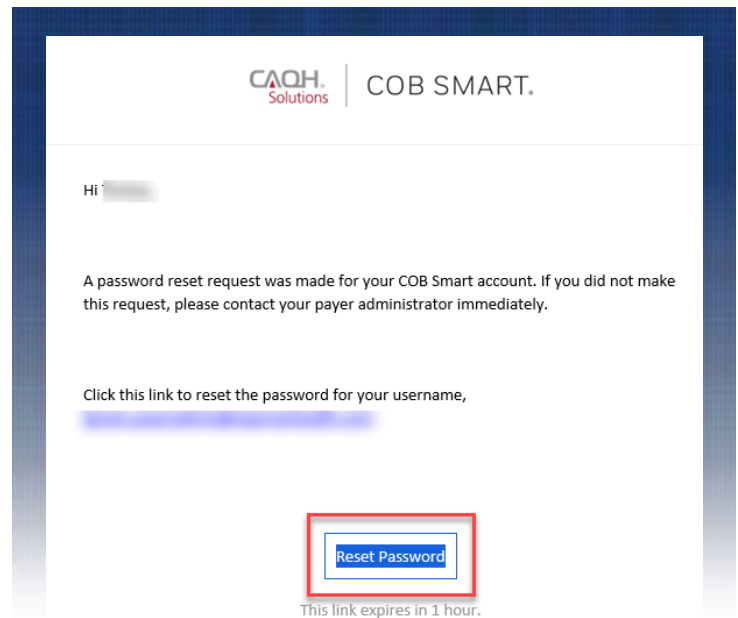

Step 5: A confirmation will appear on the screen and an email will be sent with further instructions.

NOTE: You may only reset your password once in a 24-hour period. If you attempt to reset your password more than once within 24 hours, you will receive an email requesting you contact your administrator for further assistance.

Step 6: Click on the *Reset Password* link within the email.

NOTE: This link expires in 1 hour.

Step 7: Answer your forgot password question and click *Reset Password*.

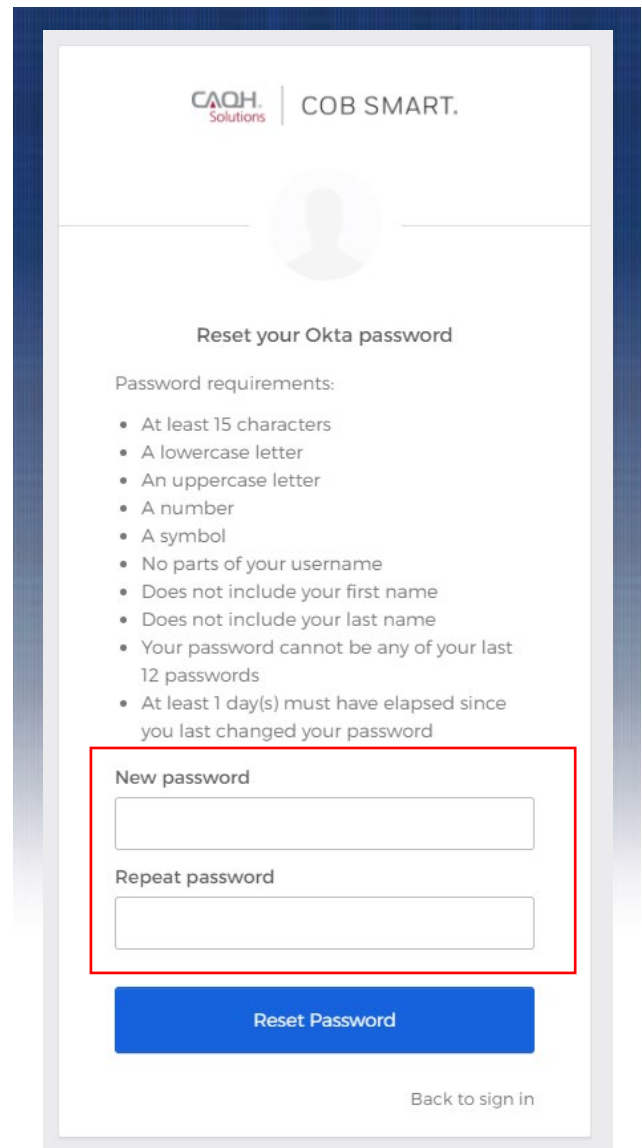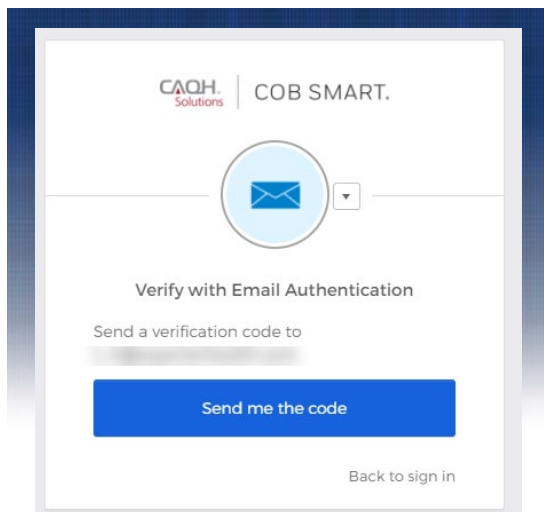Step 8: Input new password and click *Reset Password*. You will receive an email that your password has been changed.

Step 9: Click *Send me the code* button.

Step 10: Input your Verification code and click **Verify**.

NOTE: The verification code will expire after 10 minutes.
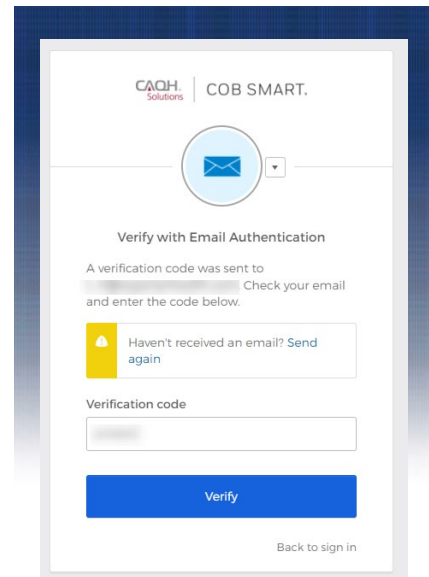
Step 11: On the Okta dashboard click on the application icon for **COB Smart Portal**.

NOTE: Once you click on the application icon, you will be navigated directly to the **COB Smart Portal**.

Password Requirements

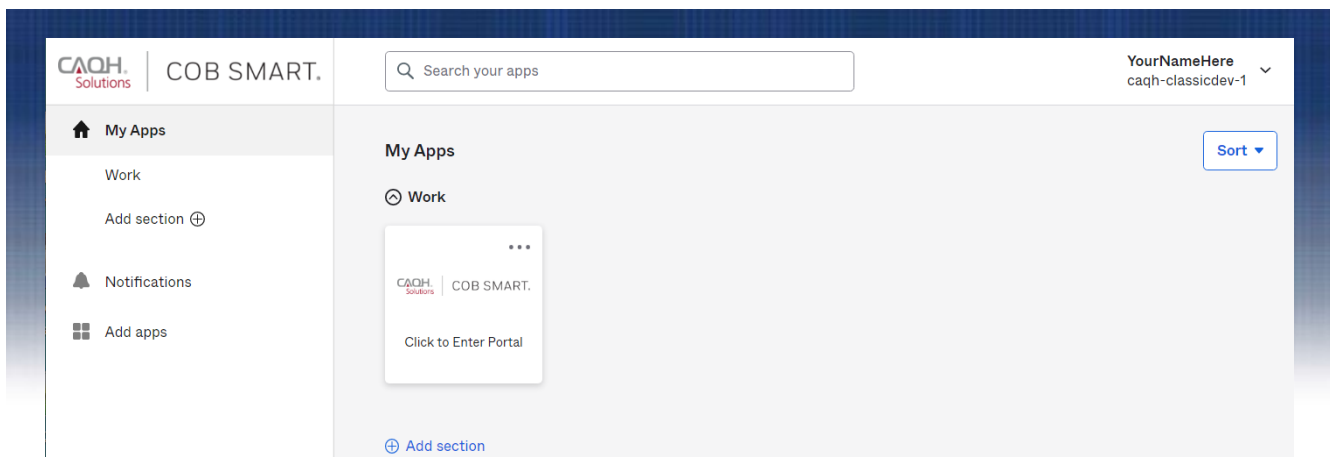Your password for the portal must meet the following requirements:

- Password must be a minimum of 15 characters
- Must contain at least one lower case letter
- Must contain at least one upper case letter
- Must contain at least one number
- Must contain at least one symbol (Examples: !@#$%^&*)
- Does not contain part of the username (email address)
- Does not contain the First Name
- Does not contain the Last Name
- Does not contain restricted common words (Example: password)
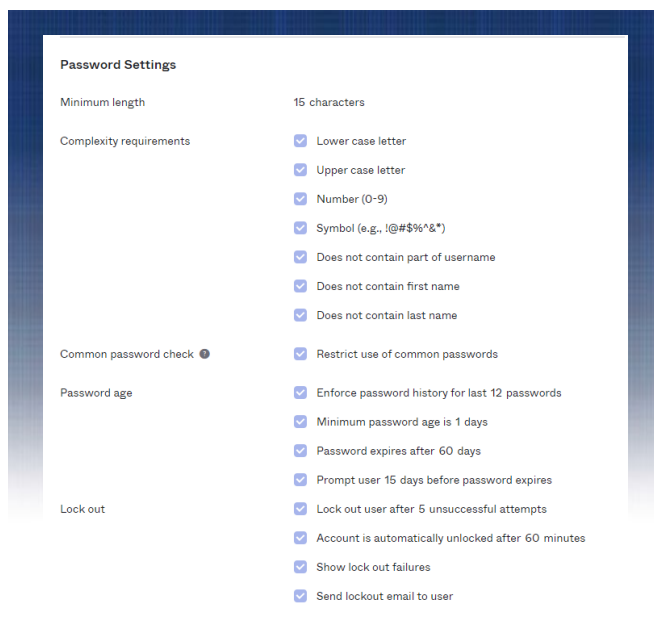- Cannot be set to a password used in the previous 12 passwords

Passwords can only be reset once per day, unless reset by an administrative action

Passwords will expire after 60 days

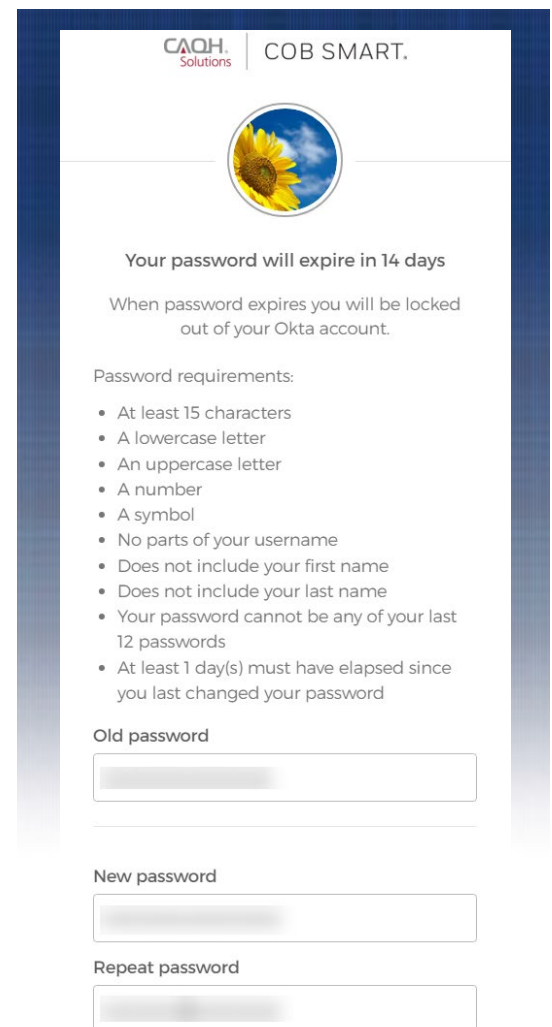Users will receive a notice 15 days prior to password expiration

User account will be locked after 5 unsuccessful login attempts

- User can follow self-help to unlock account
- Account will automatically be unlocked after 60 minutes

Password Settings

Minimum length	15 characters
Complexity requirements	☑ Lower case letter
	☑ Upper case letter
	☑ Number (0-9)
	☑ Symbol (e.g., !@#$%^&*)
	☑ Does not contain part of username
	☑ Does not contain first name
	☑ Does not contain last name
Common password check ⓘ	☑ Restrict use of common passwords
Password age	☑ Enforce password history for last 12 passwords
	☑ Minimum password age is 1 days
	☑ Password expires after 60 days
	☑ Prompt user 15 days before password expires
Lock out	☑ Lock out user after 5 unsuccessful attempts
	☑ Account is automatically unlocked after 60 minutes
	☑ Show lock out failures
	☑ Send lockout email to user

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Your password will expire in 14 days

When password expires you will be locked out of your Okta account.

Password requirements:

- At least 15 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
- Your password cannot be any of your last 12 passwords
- At least 1 day(s) must have elapsed since you last changed your password

Old password

New password

Repeat password

Administration

This section applies only to Payer Level administrators and above.
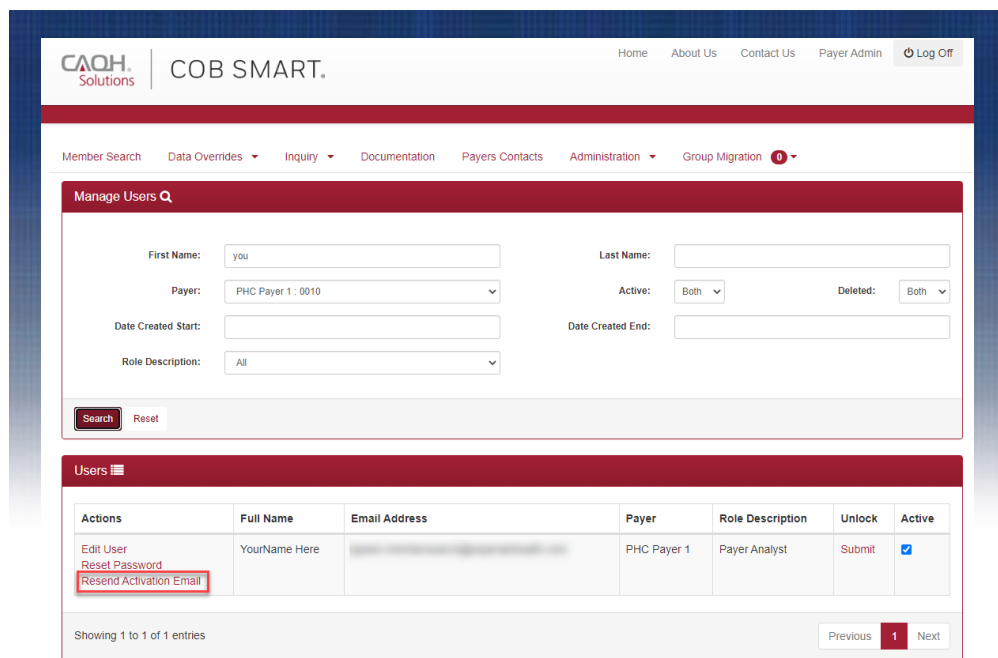
Resend Activation Email

If a user cannot locate the Okta registration email, please have them check the junk or spam folder. If the user is still unable to locate the Okta registration email an administrator may **resend the activation** email.

Step 1: Log on to the **COB Smart Portal** and navigate to **Administration/Manage Users**.
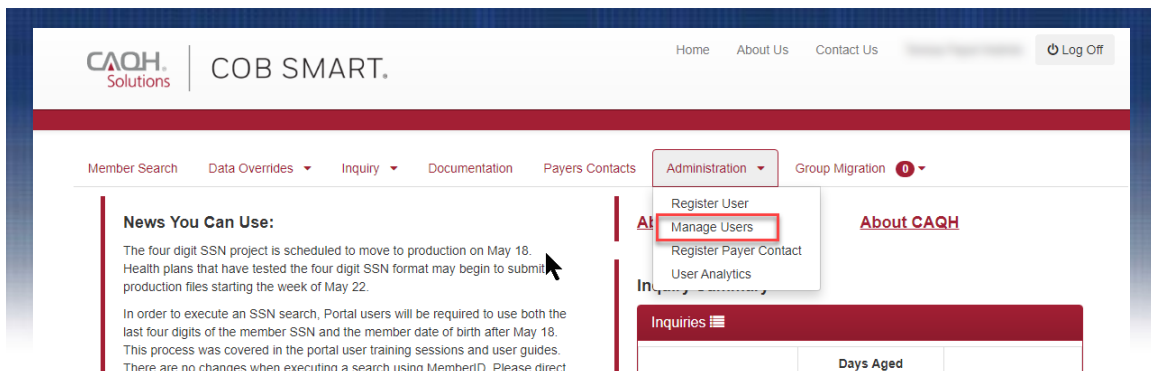
Step 2: Search for the user.

Step 3: Click the **Resend Activation Email** link.

Step 4: Verify the user has received the Okta registration email.

NOTE: Once a user has registered their account, you will not be able to resend the activation email and will receive an error message if you click the link.
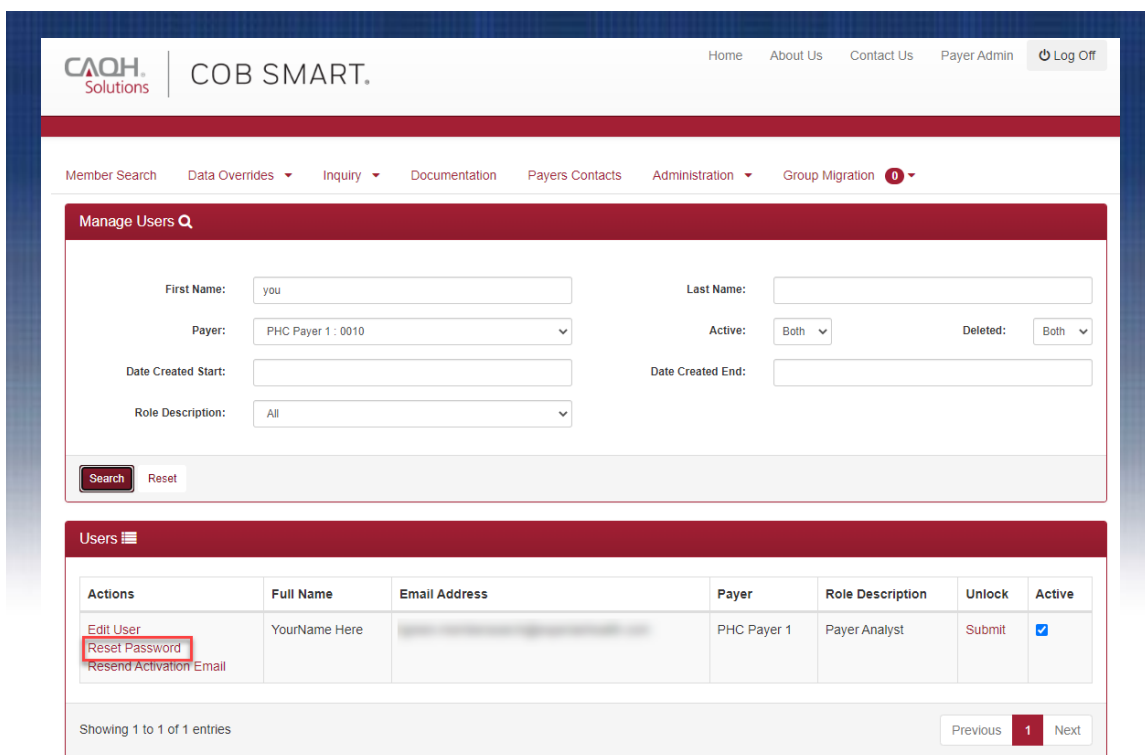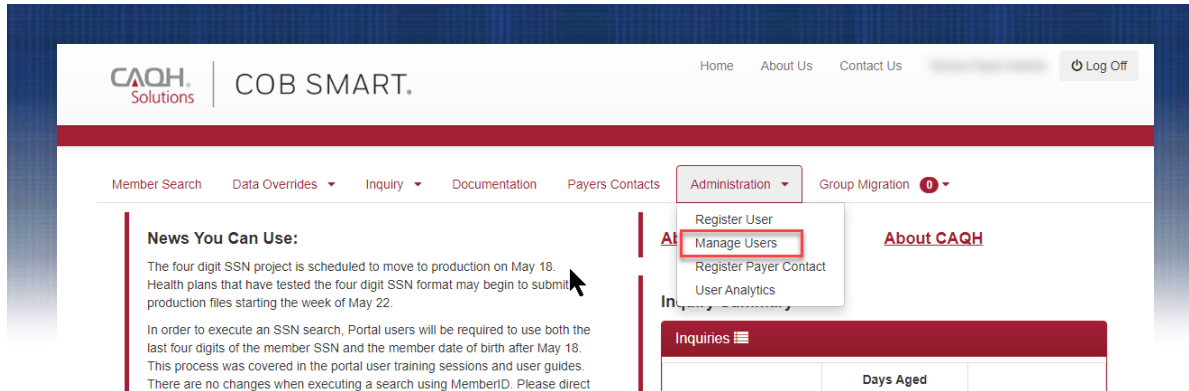
Reset Password

If a user requires their password to be reset, they can complete the self-help reset password steps. If they are unable to reset their password, an administrator can reset the password.

Step 1: Log on to the *COB Smart Portal* and navigate to *Administration/Manage Users*.
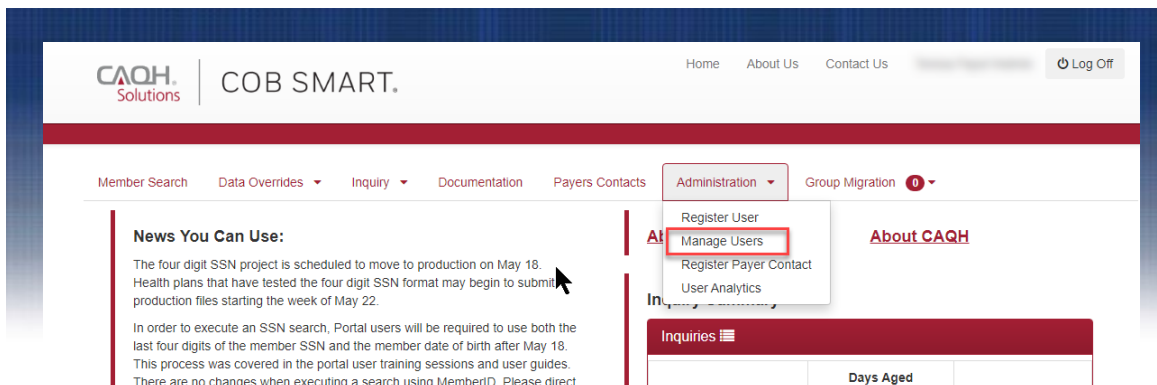
Step 2: Search for the user.

Step 3: Click the *Reset Password* link.

NOTE: *Send Reset Password Request* is also available on the *Edit User* page.

Unlock user

If a user has entered the incorrect password 5 times they will be locked out of their account. The user may follow the self-help instructions or request an administrator unlock their account.

Step 1: Log on to the **COB Smart Portal** and navigate to **Administration/Manage Users**.

Step 3: Click the **Submit** link in the Unlock column.

NOTE: The Submit link has a tooltip indicating **"Click to unlock user".**
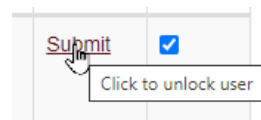
Inactivate User and Delete User

To remove access temporarily or permanently to the **COB Smart Portal**, an administrator may **inactivate** the account or **delete** the account.

Action	Result
Inactivate Account	Removes access to the **COB Smart Portal**. Sends a request to suspend the Okta account.
Delete User	Removes access to the **COB Smart Portal**.

NOTE: If a user no longer needs access to the **COB Smart Portal**, their account should be immediately deleted. Unless otherwise directed by CAQH do not make the user's account inactive in the **COB Smart Portal**. For Payer Administrators that no longer need access to the portal, a request should be sent to the help desk to have their **COB Smart Portal** account deleted.

Step 1: Log on to the **COB Smart Portal** and navigate to **Administration/Manage Users**.
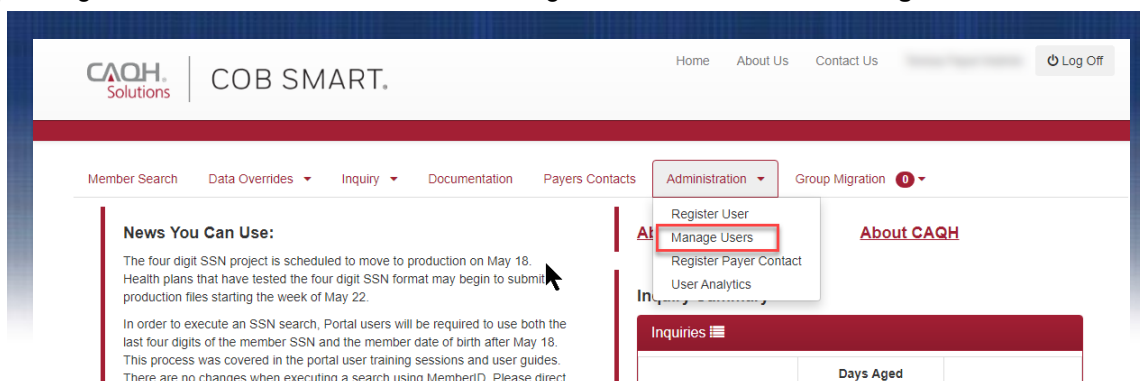
Step 2: Search for the user.

Step 3a: To inactivate the user's account uncheck the **Active** checkbox, input the suspend user reason and click **Suspend**.

Step 3b: To delete the user's account click **Edit User** on the **Manage User** screen.

Step 4: Click **Delete User**, input the Delete User reason and click **Delete**.

Undelete User

To restore access to the *COB Smart Portal*, an administrator may *undelete* a user's account.

NOTE: CAQH will remove deleted portal users from Okta. If the user has been removed from Okta you will no longer be able to undelete the user in the portal. You will have to register the user's account in the portal to restore access.

Step 1: Log on to the *COB Smart Portal* and navigate to *Administration/Manage Users*.

Step 2: Search for the user.

Step 3: To undelete the user's account click *Edit User* on the *Manage User* screen.

Step 4: Click **Undelete User**, input the reason to Undelete User reason and click **Undelete**.

Step 5: Navigate to **Administration/Manage User** page and click the **Reset Password** link for the undeleted user.

NOTE: The undeleted user will not be able to log in to the **COB Smart Portal** until they receive an email with the **Reset Password link.**