IAM Online Help guide for CMBHS External Users

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Introduction

Purpose

This document outlines the requirements of the HHS Enterprise Identity and Access Management System (IAM) for adding request management for CMBHS. It is intended for Security administrators, Providers (Contracted and Subcontracted), and non-HHS Government Agencies.

Business Context

The IAM Online System integrates and expands the security functions of CMBHS, which is used for the Mental Health and Substance Use Disorder Program. This program includes Contracted Providers, Subcontracted Providers, IT Contractor Staff, HHSC Staff, Hospital Staff, and Government Entities. These users will apply for and administer Care and Medication Programs via CMBHS (Clinical Management for Behavioral Health Services), which is designed to administer Client Care for Mental Health and Substance Use Disorder Services.

Scope

The scope of this document encompasses the provisioning of user accounts in CMBHS by the System Administrator at the provider site, who will create accounts through the Find/Add Staff Screen for accessing CMBHS via IAM. It includes the activation and authentication process, where users receive an email to activate their IAM account after it is provisioned in CMBHS, and they set up their IAM account with a password and security questions and sign an AUA agreement for the first time. Additionally, it covers the implementation of single sign-on, enabling all external users to access IAM and CMBHS through a single login.

User Characteristics

MH/SUD users consist of the following categories:

- Providers (Contracted and Subcontracted)
- Non-HHS Government Agencies
- State Hospitals

Functional Requirements

Request Management

1. **User Registration:**
   - The Security Administrator must create user account with requested roles.
   - User must Activate IAM account with the link they receive in email.

Authentication and Authorization

1. **Log-in:**
   - Users will log in to CMBHS through IAM with their Email and Password.
   - Authentication and Authorization will be handled by the IAM team and Provisioning will be handled by the Security Administrator in CMBHS.
2. **Password Policies:**
   - Password policies, including complexity requirements and expiration periods, will be enforced.

- o Users will be required to change their passwords according to the defined lifecycle rules.

Single Sign-on

1. **Authentication:**
   - o Users will log in to CMBHS through IAM with their Email and Password.
2. **Access:**
   - o After authentication and approval, users will have access to CMBHS functionalities based on the roles requested.

System Requirements

- Users will need a computer with reliable internet access.

Troubleshooting and Support

Common Issues

1. **Log-in Issues:**
   - o Verify that the username and password are correct.
   - o Ensure the account is not locked or disabled.
   - o Contact support if the problem persists.
2. **Access Denied:**
   - o Check if the access request is approved.
   - o Verify that the correct roles and permissions are assigned.
   - o Contact the supervisor for further assistance.

Support Contact

For access issues, they should contact the IAM Online Helpdesk. Call the HHSC Help Desk at:

Phone 512-438-4720 /Toll free 1-855-435-7181/ TDD 711/ Fax 512-438-5885

For questions related to the CMBHS Setup, the Security Administrator should contact the CMBHS

Helpline. HHSC CMBHS Help Line: 1-866-806-7806

CMBHS Account Creation by the Security Administrator for External Users

This guide provides step-by-step instructions for the Security Administrator to create accounts for external users in the CMBHS Application.

Steps for Account Creation

Logging In

1. **Log in to IAM Online**
   - o The Security Administrator logs in to the IAM Online portal.
2. **Navigate to My Apps Dashboard**
   - o The Security Administrator is directed to the My Apps Dashboard upon successful login.

3. **Select CMBHS Application**
    - o The Security Administrator clicks on the CMBHS tile under My Application.
4. **Open CMBHS Application**
    - o The CMBHS Application opens in a new browser tab.

Accessing Account Management

5. **Navigate to Account Management**
    - o Hover the mouse over Account Management and select Find/Add Staff.
6. **Find/Add Staff Page**
    - o The System Admin is directed to the Find/Add Staff page.

Searching for Staff

7. **Enter Staff Details**
    - o Enter the First and Last Name of the staff member.
8. **Display Disabled Accounts**
    - o Check the "Display Staff with Disabled Status" checkbox.
9. **Search for Staff**
    - o Click on the Search button.

Handling Existing User Accounts

10. **Review User Account Status**
    - o If the user account is found, it may be in Disabled, Active, or Expired status. The Account Specialist can initialize or re-initiate the account by selecting the Initiated radio button.
11. **Email Address Handling (If Email Exists)**
    - o If the requestor has an email address on the Staff Information tab, the User ID is changed to the email address when the account is initialized.
12. **Email Address Handling (If No Email)**
    - o System Administrator can enter the email address in the Email ID field.

Account Creation for New Users

13. **Email Field Requirement**
    - o **A Unique Email is required** for each account. (Note: Email id field will be greyed out once account is saved and no longer can be edited)
    - o Note: In case the user has multiple accounts with same email address (duplicate email), with the new functionality of having unique email address, user will need to have email addresses with Alias. E.g., test.lisa+1@test.com, test.lisa+2@test.com, test.lisa+3@test.com
    - o
14. **Complete Staff Information**
    - o The System Admin updates and completes the required fields on the Staff Information Tab.
15. **Verify/Update Roles**
    - o Click on the Location/Roles tab to check and update roles as necessary.
16. **Verify/Update Credentials**
    - o Click on the Credentials tab to check and update credentials as necessary.

Creating a New User Account

17. **No Existing Account Found**
    o If no user account is found, click the New Staff button.
18. **Pre-filled Staff Details**
    o The First and Last Name are pre-filled from the search, and the Initiated radio button is selected, screen only if user has searched the account.
19. **Complete Staff Information**
    o Complete the Staff Information Tab.
20. **Enter Email Address**
    o Enter the requestor's email address in the Email Address field. This becomes username for IAM Online login.
    o Note: **Once the account has been created, the email field cannot be edited**.
    o The Email field under the Staff Information tab is required.
21. **Complete Required Fields**
    o Complete the rest of the required fields on the Staff Information Tab.
22. **Enter Location and Roles**
    o Enter the necessary location(s) and role(s) in the Location/Roles tab.
23. **Enter Credentials**
    o Enter the necessary credential(s) and Begin and End Date(s) in the Credentials tab.
24. **Save the Account**
    o Click the Save button.
25. **Success Message**
    o The system displays a "Successfully Saved" message.

Post-Creation Actions

26. **CMBHS Call IAM Online through OKTA API**
    o The system calls IAM Online through the OKTA API to create the user account in IAM.
27. **Account Creation Notification**
    o The system sends a notification email to the requestor, informing them that the account request has been created.

User Activation Process

28. **Activate Account**
    o The user clicks on the Activate button in the email, redirecting them to the IAM portal.
29. **Set Password**
    o The user enters their email and clicks Next to create a new password.
30. **Multifactor Authentication**
    o The user is redirected to perform OKTA Multifactor Authentication by phone, where they enter their phone number, receive a text message, and submit the code.
31. **Set Security Questions**
    o The user sets security questions for their account and clicks Submit.
32. **End of Activation Process**
    o The user process is complete.

This guide provides detailed steps for the Security Administrator to create and manage user accounts in the CMBHS application, ensuring proper workflow and compliance with new system functions.

CMBHS Account Creation by System Admin for External Users Screenshots

System Admin land on CMBHS and click on log in.

Security admin user

Login TO ATHENTICATE THROUGH IAM Online CMBHS -INTEGRATION

USER ENTER PASSWORD

ENTER SECURITY METHOD

LAND ON FIND/ADD STAFF SCREEN

Search Criteria

First Name	
Last Name	
Title	
Office Phone	
Email Address	

☐ Display Staff with Disabled status

New Staff   Provider Detail

Search

Filter by Character

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #

New Staff   Provider Detail

Search Criteria

First Name	
Last Name	
Title	
Office Phone	
Email Address	newClinicianfiveg@team527339.testinato

Search

Search

☑ Display Staff with Disabled status

Filter by Character

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #

Staff List

41 Record(s) found

No records found

Previous 1 Next

HHSC CMBHS Help Line: 1-866-806-7806

Staff Detail   ORG012

Save   Cancel

Staff Information | **Location/Roles** | Credentials

Location/Roles List

Location   North Texas Behavioral Health Authority   ☑ Primary Location

Roles

Business Manager
Case Manager
Client Reports
Clinical Data Entry
Clinical Supervisor
CMBHS Document Access
Daily Capacity Reports

Clinician

» › ‹ «

Primary Role   Clinician   Add   Cancel

Select Location/Role	Location	Roles	Primary Location	Primary Role
No records found				

HHSC CMBHS Help Line: 1-866-806-7806

Staff Detail   ORG012

Save Cancel

Staff Information | Location/Roles | Credentials

Location/Roles List

New Role

Select Location/Role	Location	Roles	Primary Location	Primary Role
Select	North Texas Behavioral Health Authority	Clinician	Y	Clinician
				Edit Remove

Staff Detail   ORG012

Save Cancel

Staff Information | Location/Roles | Credentials

Person Information

Title	*newClinician
Prefix	None Selected ∨
Suffix	None Selected ∨
First Name	*newClinician
Middle Name	
Last Name	*Clinicianfive
Date of Birth	mm/dd/yyyy

Access

Account Status   ⦿ Initiated ○ Disabled ○ Enabled ○ Expired

Dropdown Only User   ☐

Contact Information

Office Phone	Ext
Phone Type	None Selected ∨
Other Phone	Ext
Email	*newClinicianfive@team527339.testinator.com

Staff Detail   ORG012

Save Cancel

Staff Information | Location/Roles | Credentials

Credentials

Credentials	*LPC ∨
Begin Date	*04/30/2024 mm/dd/yyyy
End Date	*04/30/2025 mm/dd/yyyy

Add Cancel

Select Credential	Credential	Begin Date	End Date
No records found			

Staff Detail   ORG012

Save Cancel

Staff Information | Location/Roles | Credentials

Credentials

New Credential

Select Credential	Credential	Begin Date	End Date
Select	LPC	04/30/2024	04/30/2025
			Edit Remove

CMBHS
Clinical Management for Behavioral Health Services

cmbhstest.dshs.state.tx.us says

Successfully saved

OK

04/30/2024 - Build 925

Help   Logout

Provider: North Texas Behavioral Health Authority   User Name: TesterB, Test

Home
Find/Add Client

Staff Detail   ORG012

Edit Staff Search

Staff Information | Location/Roles | Credentials

Credentials

Credential	Begin Date	End Date
LPC	04/30/2024	04/30/2025

CMBHS New Login Process for External Users (First-Time Workflow)

This guide provides detailed steps for external users to log in to the CMBHS application for the first time.

Step-by-Step Instructions

1. **Receive Activation Email**

   o **Step:** The user receives an email after their account is generated in CMBHS.

   o **Note:** This email is only sent if the user does not already have an IAM Online account. **The account activation must be completed within 7 days.** If users are unable to activate account within 7 days, they have to contact HHSC Helpline to resend activation email. User can contact HHSC Helpline on below contact methods:

   Call the HHSC Help Desk at:

   Phone 512-438-4720

   Toll free 1-855-435-7181

   TDD 711

   Fax 512-438-5885

2. **Click Activate Button**
   o **Step:** The user clicks on the Activate button in the email.
   o **Result:** The user is redirected to the IAM portal.
3. **Redirect to IAM Portal**
   o **Step:** The system redirects the user to the IAM Online portal (Users can bookmark this link for daily use IAM Online
4. **Enter Username**
   o **Step:** In the Username field, the user enters their CMBHS email account (e.g., green.michael@mhmrtc.org).
5. **Click Next Button**
   o **Step:** The user clicks the Next button.
6. **Set New Password**
   o **Step:** The user is prompted to enter a new password and then clicks Next.
7. **Perform OKTA Multifactor Authentication**
   o **Step:** The user is redirected to the OKTA Multifactor Authentication page.
   o **Action:** The user enters their phone number to receive a text message, enters the code received, and clicks Submit.
8. **Set Security Questions**
   o **Step:** The user is redirected to set security questions for their account.
   o **Action:** The user sets the security questions and clicks Submit.
9. **Submit Security Questions**
   o **Step:** The user clicks the Submit button.

10. **Fill and Sign AUA Agreement**
    - o **Step:** The user will see the AUA Agreement tile.
    - o **Action:** The user needs to fill out, sign, and submit the AUA Agreement.
11. **Access CMBHS Tile**
    - o **Step:** The user will see the CMBHS tile on the Home Page.
    - o **Action:** The user clicks on the CMBHS tile.
12. **Log in to CMBHS**
    - o **Step:** The user is logged in to CMBHS.
13. **CMBHS Default Landing Page**
    - o **Step:** The user's CMBHS default landing page is displayed.

Important Notes

- External users must sign the AUA agreement upon their first login to IAM.

This guide helps ensure a smooth and successful first-time login process for external users accessing the CMBHS application.

CMBHS New Login Process External Users for the First-time Workflow Screenshots

IAMOnline - Sign In

Username

first.last@hhs.texas.gov

☐ Keep me signed in

Next

Forgot Password? (HHS/DSHS Emails Only)

Request account as non-HHS employee, or register organization

Sign Acceptable Use Agreement

System Use Notification

Warning: This is a Texas Health and Human Services information resources system that contains State and/or U.S. Government information. By using this system you acknowledge and agree that you have no right of privacy in connection with your use of the system or your access to the information contained within it. By accessing and using this system you are consenting to the monitoring of your use of the system, and to security assessment and auditing activities that may be used for law enforcement or other legally permissible purposes. Any unauthorized use or access, or any unauthorized attempts to use or access, this system may subject you to disciplinary action, sanctions, civil penalties, or criminal prosecution to the extent permitted under applicable law.

Verify it's you with a security method

🔵 newClinicianfive@team527339.testinator.com

Select from the following options

✉ Email   Select

🔒 Password   Select

Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

System Use Notification

TEXAS
Health and Human Services

Verify it's you with a security method

newClinicianfive@team527339.testinator.com

Select from the following options

Phone
+1 XXX-XXX-6559   Select

Security Question   Select

Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

System Use Notification

TEXAS
Health and Human Services

Verify with your Security Question

newClinicianfive@team527339.testinator.com

Where did you go for your favorite vacation?

•••••

Verify

Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

My Apps
Acceptable User Agreem...
My Applications
Add section ⊕

🔔 Notifications

My Apps   Sort ▼

⊙ Acceptable User Agreement (AUA)

🔒   • • •

[icon]

Acceptable Use
Agreement (AUA)...

⊙ My Applications

🔒 • • •   🔒 • • •   🔒 • • •   🔒 • • •   🔒 • • •   🔒 • • •

[Forms]   [shield]   [clock]   PEBLES   ►ARCHER™   ★
                                            Inquiry

Forms   Manage My   Access   PEBLES   Archer GRC   Authorized Help
               Access   Requests   Inquiry   Guide

⊕ Add section

IT Glossary
Provides definitions for technical or specialized terms.

Information Security Acceptable Use Agreement

You must complete this agreement if you use HHS information resources. Before signing this agreement, read the Information Security Acceptable Use Policy in its entirety and make sure that you understand it. If you need help accessing the policy, speak to your supervisor or contract manager.

By selecting "I Agree" and typing my name below, I acknowledge that I have read and understood the agreement, and I agree to comply with its terms. *
● I Agree
○ I Don't Agree

Acknowledgement

I have read, understand, and will comply with the requirements in the Information Security Acceptable Use Policy.

First Name *
Clinician

Last Name *
Tester5

Your Work Email *
newClinicianfive@team527339.testinator.com

Your Work Phone

I am (choose one and explain below): *

Your Work Email *

newClinicianfive@team527339.testinator.com

Your Work Phone

I am (choose one and explain below): *

○ An employee of HHSC (specify department and division)
○ An employee of DSHS (specify department and division)
○ An employee of another agency (specify agency, department, and division)
○ A contractor (specify employer or non-state agency name)
○ An intern or volunteer (specify agency, department, and division)
◉ Other (specify below if you are an advisory council member or an employee of a private provider)

Comments

HHS Employee ID, if applicable

Date Agreement Signed *

04/30/2024 📅

Submit

TEXAS
Health and Human
Services

Home   My Work ▾   ❓ 🔔   newClinician Clini... ▾

Your signed AUA Form has been successfully submitted. Thank you.

🏠 Home   ✎ Edit

| Manage Access(Beta) ⟩ | Sign AUA Form ⟩ | Policy Violations ⟩ 0 | Approvals ⟩ 0 | Manage My Access ⟩ |

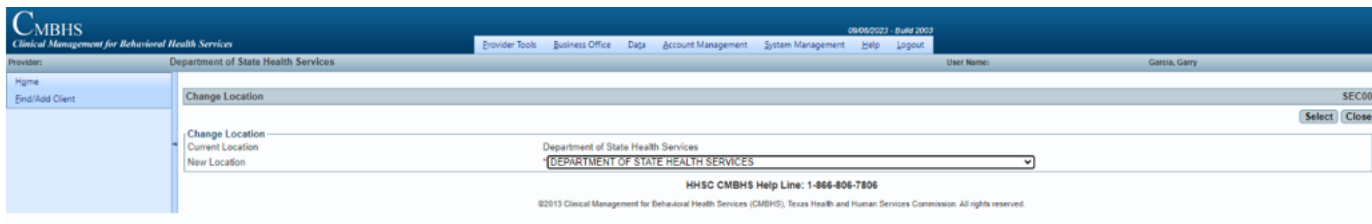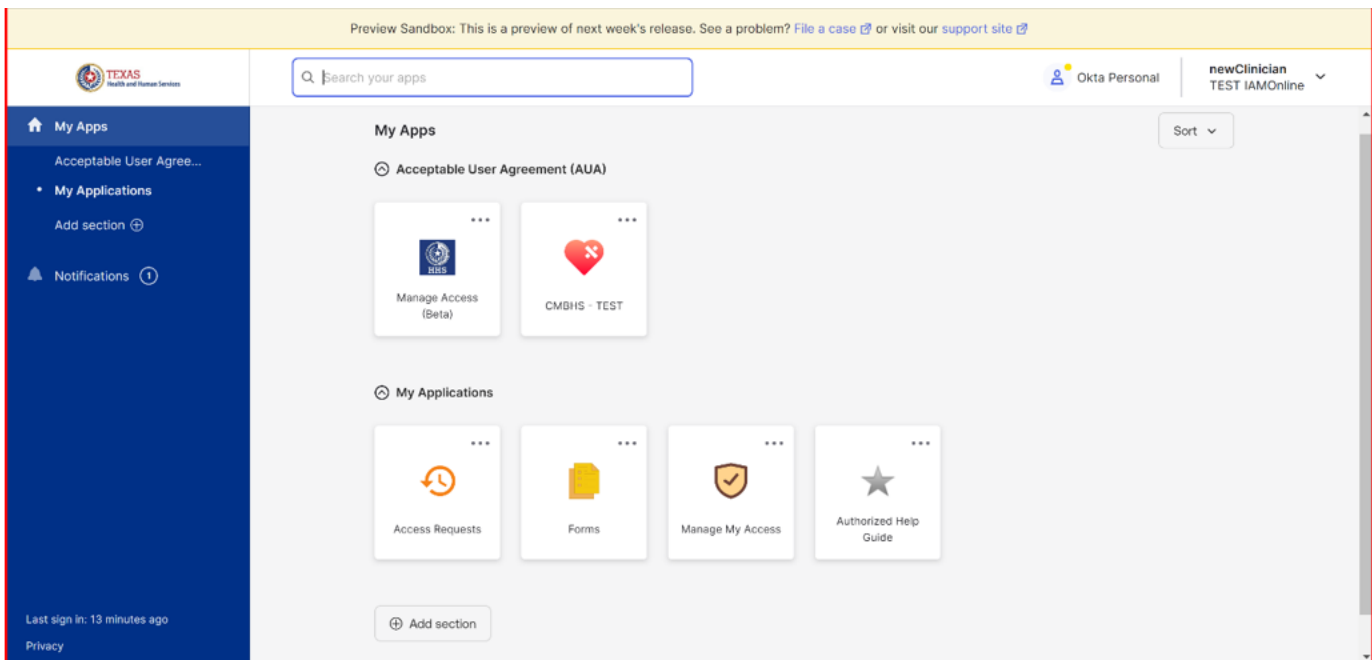| Latest Violation Work Items Both ⌄	My Access Reviews	Latest Approvals
Currently no data	Currently no data	Currently no data
All ⟩	All ⟩ Reviews: 0	All ⟩

Latest Forms

CMBHS External Users Login Workflow through IAM Online

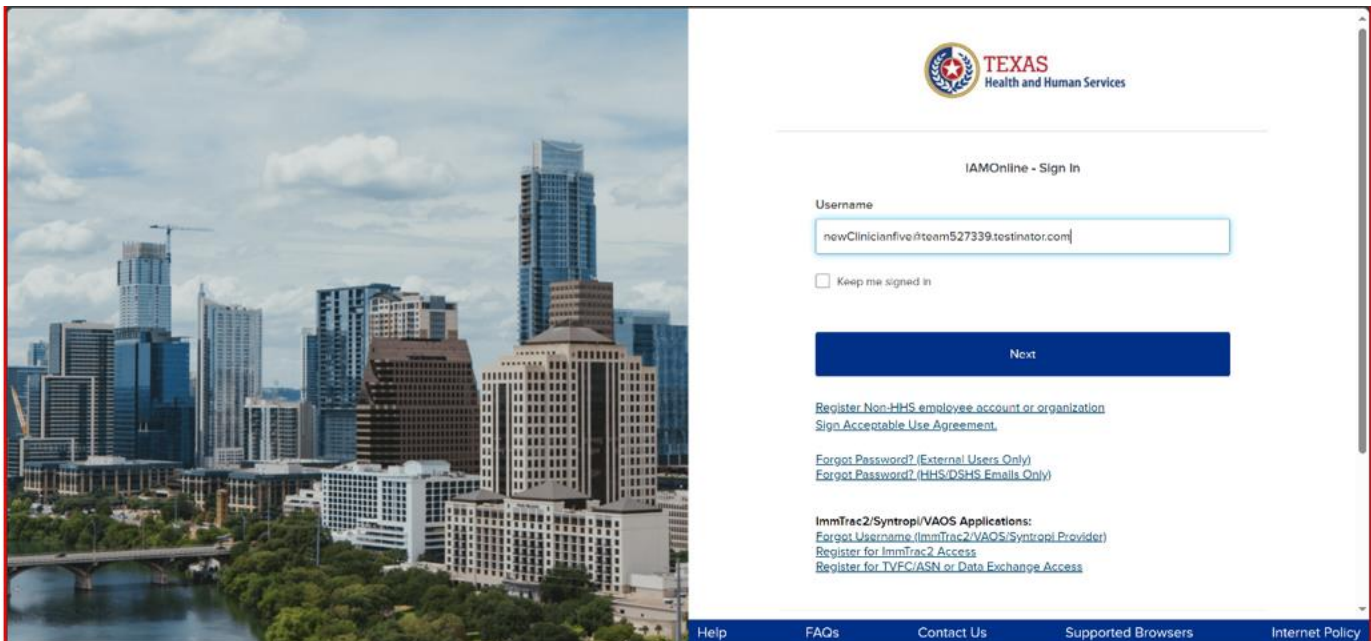This guide provides detailed steps for external users to log in to the CMBHS application through IAM Online.

Step-by-Step Instructions

1. **Access IAM Login Page**
   - **Step:** The user uses the following link to land on the IAM login page: IAM Online
2. **Enter Username**
   - **Step:** In the Username field, the user enters their state email address (e.g., green.michael@mhmrtc.org).
3. **Click Next Button**
   - **Step:** The user clicks the Next button.
4. **Enter Password**
   - **Step:** The user is prompted to enter their password and then clicks Next.
5. **Perform OKTA Multifactor Authentication**
   - **Step:** The user is redirected to perform OKTA Multifactor Authentication by phone.

- **Action:** The user enters their phone number to receive a text message, enters the code received, and clicks Submit.
6. **Land on IAM Online Home Page**
    - **Step:** The user is redirected to the IAM Online Home page.
7. **Access CMBHS Tile**
    - **Step:** The user will see the CMBHS tile on the Home Page.
    - **Action:** The user clicks on the CMBHS tile.
8. **Log in to CMBHS**
    - **Step:** The user is logged in to CMBHS.
9. **CMBHS Default Landing Page**
    - **Step:** The user's CMBHS default landing page is displayed.
10. **End of Use Case**
    - **Note:** The use case ends here.

This guide helps ensure a smooth and successful login process for external users accessing the CMBHS application through IAM Online.

CMBHS External User's login workflow for CMBHS through IAM Online Screenshots

TEXAS
Health and Human Services

Verify with your password

newClinicianfive@team527339.testinator.com

Password

····················

Verify

Forgot Password? (External Users Only)
Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)

| Help | FAQs | Contact Us | Supported Browsers | Internet Policy |

TEXAS
Health and Human Services

Verify it's you with a security method

newClinicianfive@team527339.testinator.com

Select from the following options

Phone
+1 XXX-XXX-6559   Select

Security Question   Select

Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

System Use Notification

| Help | FAQs | Contact Us | Supported Browsers | Internet Policy |

TEXAS
Health and Human Services

Verify with your Security Question

newClinicianfive@team527339.testinator.com

Where did you go for your favorite vacation?

•••••

Verify

Verify with something else

Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

| Help | FAQs | Contact Us | Supported Browsers | Internet Policy |

Preview Sandbox: This is a preview of next week's release. See a problem? File a case ⎘ or visit our support site ⎘

TEXAS
Health and Human Services

🔍 Search your apps

👤 Okta Personal   **newClinician** ⌄
TEST IAMOnline

🏠 **My Apps**

Acceptable User Agree...

My Applications

Add section ⊕

🔔 Notifications ①

My Apps   Sort ⌄

⌄ Acceptable User Agreement (AUA)

Manage Access (Beta)   CMBHS - TEST

⌄ My Applications

Access Requests   Forms   Manage My Access   Authorized Help Guide

Last sign in: a few seconds ago

Privacy

⊕ Add section

CMBHS External User's Login Workflow through CMBHS

This guide provides detailed steps for external users to log in to the CMBHS application through the CMBHS website.
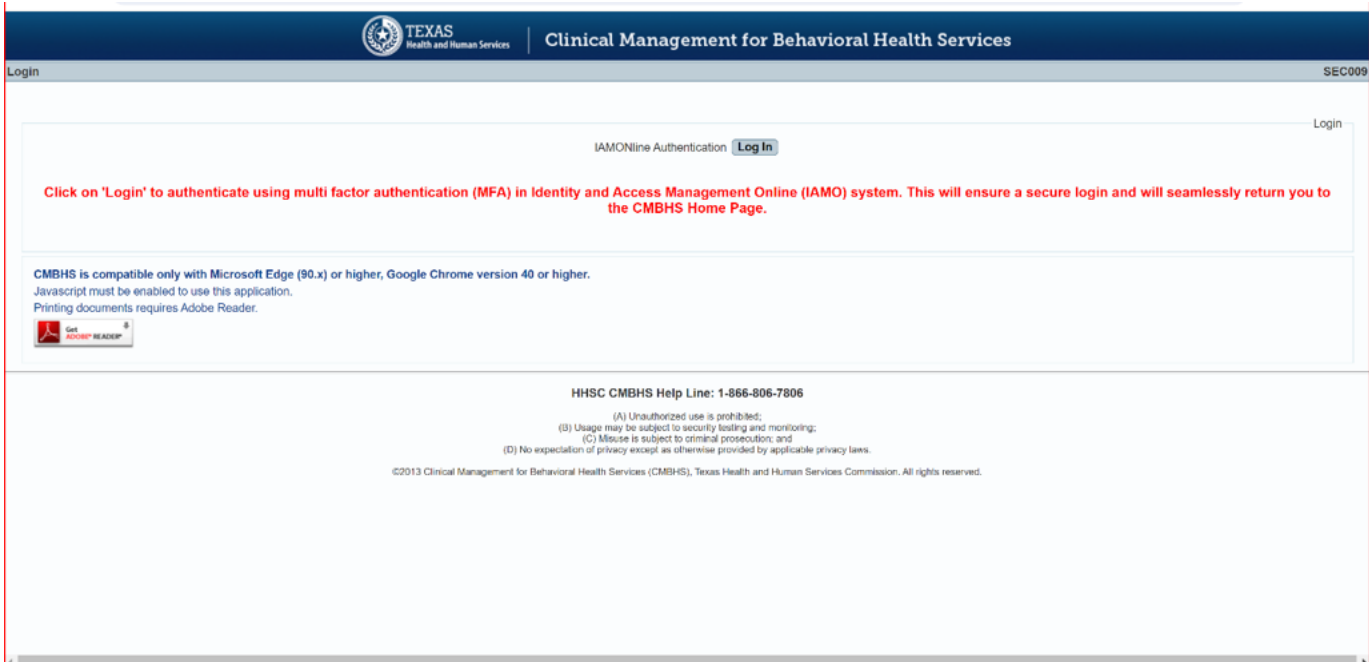
Step-by-Step Instructions

1. **Access CMBHS Login Page**
   - **Step:** The user goes to [CMBHS](#) on their browser and presses the Enter button on their keyboard.
2. **Read CMBHS Banner**
   - **Step:** The user is defaulted to the CMBHS page.
   - **Note:** This allows the user to read through the CMBHS banner.
3. **Click Login Button**
   - **Step:** On the CMBHS page, the user clicks on the login button.
4. **Redirect to IAM Login Page**
   - **Step:** The system redirects the user to [IAM Online](#)
5. **Enter Username**
   - **Step:** In the Username field, the user enters their state email address (e.g., green.michael@mhmrtc.org).
6. **Click Next Button**
   - **Step:** The user clicks the Next button.
7. **Enter Password**
   - **Step:** The user is prompted to enter their password and then clicks Next.
8. **Perform OKTA Multifactor Authentication**
   - **Step:** The user is redirected to perform OKTA Multifactor Authentication by phone.
   - **Action:** The user enters their phone number to receive a text message, enters the code received, and clicks Submit.
9. **Redirect to CMBHS Home Page**

- o **Step:** The system redirects the user to the CMBHS Home Page.
10. **End of Use Case**
     - o **Note:** The use case ends here.

This guide helps ensure a smooth and successful login process for external users accessing the CMBHS application through the CMBHS website.

CMBHS External User's login workflow through CMBHS Screenshots

TEXAS
Health and Human Services

Verify it's you with a security method

testernewb@mailinator.com

Select from the following options

	Email	Select
	Password	Select

Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

System Use Notification

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

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TEXAS
Health and Human Services

Verify with your password

testernewb@mailinator.com

Password

········· ···········

Verify

Forgot Password? (External Users Only)
Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

Disabling External User Accounts in CMBHS (CMBHS External Users)

This guide provides detailed steps for Security Administrators to disable external user accounts in the CMBHS application.

Step-by-Step Instructions

1. **Access CMBHS Login Page**

- o **Step:** The Security Administrator goes to [CMBHS](#) on their browser and presses the Enter button on their keyboard.
2. **Click Login Button**
   - o **Step:** On the CMBHS page, the user clicks on the login button.
3. **Redirect to IAM Login Page**
   - o **Step:** The system redirects the user to [IAM Online](#)
4. **Enter Username**
   - o **Step:** In the Username field, the user enters their state email address (e.g., green.michael@mhmrtc.org).
5. **Click Next Button**
   - o **Step:** The user clicks the Next button.
6. **Enter Password**
   - o **Step:** The user is prompted to enter their password and then clicks Next.
7. **Perform OKTA Multifactor Authentication**
   - o **Step:** The user is redirected to perform OKTA Multifactor Authentication by phone.
   - o **Action:** The user enters their phone number to receive a text message, enters the code received, and clicks Submit.
8. **Land on IAM Online Home Page**
   - o **Step:** The user is redirected to the IAM Online Home page.
9. **Access CMBHS Tile**
   - o **Step:** The user will see the CMBHS tile on the Home Page.
   - o **Action:** The user clicks on the CMBHS tile.
10. **Log in to CMBHS.**
    - o **Step:** The user is logged in to CMBHS.
11. **CMBHS Default Landing Page**
    - o **Step:** The user's CMBHS default landing page is displayed.
12. **Select Provider/Location**
    - o **Step:** To disable the account, the user needs to select the provider/location where the account was created.
    - o **Action:** The user navigates to the provider/location and clicks select on the screen.
13. **Access Account Management**
    - o **Step:** On the CMBHS top menu, the user clicks on Account Management, then clicks on Find/Add Staff.
14. **Search and Select Staff**
    - o **Step:** The user searches for the staff member, selects the staff to highlight it, and clicks on the Staff Details button.
    - o **Result:** The staff detail page is displayed.
15. **Edit Staff Details**
    - o **Step:** The user clicks on the Edit button.
    - o **Result:** The staff detail page is displayed in edit mode.
16. **Disable Account**
    - o **Step:** The user clicks on the Disabled checkbox and clicks Save.
    - o **Result:** The CMBHS account is disabled in CMBHS, the IAM Online API is called, and the disabled user account is removed from the CMBHS OKTA Group in IAM Online.
17. **End of Use Case**
    - o **Note:** The use case ends here.

This guide helps ensure a smooth and successful process for disabling external user accounts in the CMBHS application.

CMBHS Disabling External User Accounts Screenshots (CMBHS External Users)

Clinical Management for Behavioral Health Services

TEXAS
Health and Human Services

• Effective immediately, the Cumulative and Daily Reconciliation reports for Batch Providers will be delivered solely in HTML format. For any questions or concerns, please get in touch with the Helpline.
• The CMBHS Helpdesk fax line is no longer available. Please use CMBHS Helpline email CMBHStrainingteam@hhs.texas.gov to send documents.

Login

Log In

CMBHS is compatible only with Microsoft Edge (90.x) or higher, Google Chrome version 40 or higher.
Javascript must be enabled to use this application.
Printing documents requires Adobe Reader.

Get ADOBE READER

HHSC CMBHS Help Line: 1-866-806-7806

(A) Unauthorized use is prohibited;
(B) Usage may be subject to security testing and monitoring;
(C) Misuse is subject to criminal prosecution; and
(D) No expectation of privacy except as otherwise provided by applicable privacy laws.

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TEXAS
Health and Human Services

IAMOnline - Sign In

Username

testernewb@mailinator.com

☐ Keep me signed in

Next

Register Non-HHS employee account or organization
Sign Acceptable Use Agreement.

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

System Use Notification

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

TEXAS
Health and Human Services

Verify it's you with a security method

testernewb@mailinator.com

Select from the following options

| | Email | Select |
| | Password | Select |

Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

System Use Notification

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

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TEXAS
Health and Human Services

Verify with your password

testernewb@mailinator.com

Password

•••••••••••••••••

Verify

Forgot Password? (External Users Only)
Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

Provider Tools   Business Office   Oep   Account Management   Help   Logout

Provider: North Texas Behavioral Health Authority   User Name: TesterB, Test

Home
Find/Add Client

Find/Add Staff   ORG01

New Staff   Provider Detail

Search Criteria
First Name
Last Name
Title
Office Phone
Email Address   newClinicianfive@team527339.testinator   Search
☐ Display Staff with Disabled status

Filter by Character
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #

Staff List
Staff Detail
1 Record(s) found

Select Staff	Last Name	First Name	Title	Office Phone	Email	Status	User Id	Locations
Select	Clinicianfive	newClinician	newClinician		newClinicianfive@team527339.testinator.com	Enabled	newClinicianfive@team527339.testinator.com	North Texas Behavioral Health Authority

Staff Detail

Previous 1 Next

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CMBHS
Clinical Management for Behavioral Health Services

Provider Tools   Business Office   Oep   Account Management   Help   Logout

Provider: North Texas Behavioral Health Authority   User Name: TesterB, Test

Home
Find/Add Client

Staff Detail   ORG012

Edit   Staff Search

Staff Information | Location/Roles | Credentials

Person Information
Title   newClinician
Prefix
Suffix
First Name   newClinician
Middle Name
Last Name   Clinicianfive
Date of Birth

Access
Account Status   Enabled
Dropdown Only User   No
Contact Information
Office Phone
Phone Type
Other Phone
Email   newClinicianfive@team527339.testinator.com

HHSC CMBHS Help Line: 1-866-806-7806
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CMBHS
Clinical Management for Behavioral Health Services

Provider Tools   Business Office   Oep   Account Management   Help   Logout

Provider: North Texas Behavioral Health Authority   User Name: TesterB, Test

Home
Find/Add Client

Staff Detail   ORG012

Save   Cancel

Staff Information | Location/Roles | Credentials

Person Information
Title   newClinician
Prefix   None Selected ∨
Suffix   None Selected ∨
First Name   newClinician
Middle Name
Last Name   Clinicianfive
Date of Birth   mm/dd/yyyy

Access
Account Status   ○ Initiated ○ Disabled ◉ Enabled ○ Expired
Dropdown Only User   ☐
Contact Information
Office Phone   Ext
Phone Type   None Selected ∨
Other Phone   Ext
Email   newClinicianfive@team527339.testinator.com

HHSC CMBHS Help Line: 1-866-806-7806
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CMBHS
Clinical Management for Behavioral Health Services

Provider: North Texas Behavioral Health Authority   User Name: TesterB, Test

Home
Find/Add Client

cmbhstest.dshs.state.tx.us says

Successfully saved

OK

Staff Detail   ORG012

Edit   Staff Search

Staff Information | Location/Roles | Credentials

Person Information
Title   newClinician
Prefix
Suffix
First Name   newClinician
Middle Name
Last Name   Clinicianfive
Date of Birth

Access
Account Status   Disabled
Dropdown Only User   No
Contact Information
Office Phone
Phone Type
Other Phone
Email   newClinicianfive@team527339.testinator.com

HHSC CMBHS Help Line: 1-866-806-7806
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CMBHS
Clinical Management for Behavioral Health Services

Provider Tools   Business Office   Oep   Account Management   Help   Logout

Provider: North Texas Behavioral Health Authority   User Name: TesterB, Test

Home
Find/Add Client

Staff Detail   ORG012

Edit   Staff Search

Staff Information | Location/Roles | Credentials

Person Information
Title   newClinician
Prefix
Suffix
First Name   newClinician
Middle Name
Last Name   Clinicianfive
Date of Birth

Access
Account Status   Disabled
Dropdown Only User   No
Contact Information
Office Phone
Phone Type
Other Phone
Email   newClinicianfive@team527339.testinator.com

HHSC CMBHS Help Line: 1-866-806-7806
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USER DISABLED –NOW LOGIN IN BACK FROM IAMO

TEXAS
Health and Human Services

Verify with your password

newClinicianfive@team527339.testinator.com

Password

••••••••••••••••••••

Verify

Forgot Password? (External Users Only)
Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

TEXAS
Health and Human Services

Verify with your Security Question

newClinicianfive@team527339.testinator.com

Where did you go for your favorite vacation?

•••••

Verify

Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

TEXAS
Health and Human Services

🔍 Search your apps

👤 Okta Personal

newClinician
TEST IAMOnline ⌄

🏠 **My Apps**
   Acceptable User Agree...
   My Applications
   Add section ⊕

🔔 Notifications ①

My Apps

Sort ⌄

⌃ Acceptable User Agreement (AUA)

• • •
🔷 HHS
Manage Access
(Beta)

⌃ My Applications

• • •
🕑
Access Requests

• • •
📁
Forms

• • •
🛡
Manage My Access

• • •
⭐
Authorized Help
Guide

Last sign in: a few seconds ago
Privacy

⊕ Add section

TEXAS
Health and Human Services

🔍 cmbhs

👤 Okta Personal

newClinician
TEST IAMOnline ⌄

🏠 **My Apps**
   Acceptable User Agree...
   My Applications
   Add section ⊕

🔔 Notifications ①

🔍❓

You don't have this app

Sort ⌄

HHS
Manage Access
(Beta)

⌃ My Applications

• • •
🕑
Access Requests

• • •
📁
Forms

• • •
🛡
Manage My Access

• • •
⭐
Authorized Help
Guide

Last sign in: a few seconds ago
Privacy

⊕ Add section

Enabling External User Accounts in CMBHS (CMBHS External Users)

This guide provides detailed steps for Security Administrators to enable external user accounts in the CMBHS application.

Step-by-Step Instructions

1. **Access CMBHS Login Page**
   - **Step:** The Security Administrator goes to CMBHS on their browser and presses the Enter button on their keyboard.
2. **Read CMBHS Banner**
   - **Step:** The user is defaulted to the CMBHS page.
   - **Note:** This allows the user to read the CMBHS banner.
3. **Click Login Button**
   - **Step:** On the CMBHS page, the user clicks on the login button.
4. **Redirect to IAM Login Page**
5. **Step:** The system redirects the user to IAM Online. **Enter Username**
   - **Step:** In the Username field, the user enters their organization email address and clicks the Next button.
6. **Enter Password**
   - **Step:** The user enters their password.
7. **Click Sign in Button**
   - **Step:** The user clicks the Sign In button.
8. **Log in to CMBHS.**
   - **Step:** The user is logged in to CMBHS.
9. **CMBHS Default Landing Page**
   - **Step:** The user's CMBHS default landing page is displayed.
10. **Select Provider/Location**
    - **Step:** To enable the account, the user needs to select the provider/location where the account was created.
    - **Action:** The user navigates to the provider/location and clicks select on the screen.
11. **Access Account Management**
    - **Step:** On the CMBHS top menu, the user clicks on Account Management, then clicks on Find/Add Staff.
12. **Search and Select Staff**
    - **Step:** The user searches for the staff member, selects the staff to highlight it, and clicks on the Staff Details button.
    - **Result:** The staff detail page is displayed.
13. **Edit Staff Details**
    - **Step:** The user clicks on the Edit button.
    - **Result:** The staff detail page is displayed in edit mode.
14. **Enable Account**
    - **Step:** The user clicks on the Initiated checkbox and clicks Save.
    - **Result:** The CMBHS account is Initiated in CMBHS, the IAM Online API is called, and the Initiated user account is enabled from the CMBHS OKTA Group in IAM Online.
15. **End of Use Case**
    - **Note:** The use case ends here.

This guide helps ensure a smooth and successful process for enabling external user accounts in the CMBHS application.

CMBHS Enable External User Accounts Screenshots (CMBHS External Users)

TEXAS
Health and Human Services

Verify with your password

testernewb@mailinator.com

Password

••••••••••••••••••   👁

[Verify]

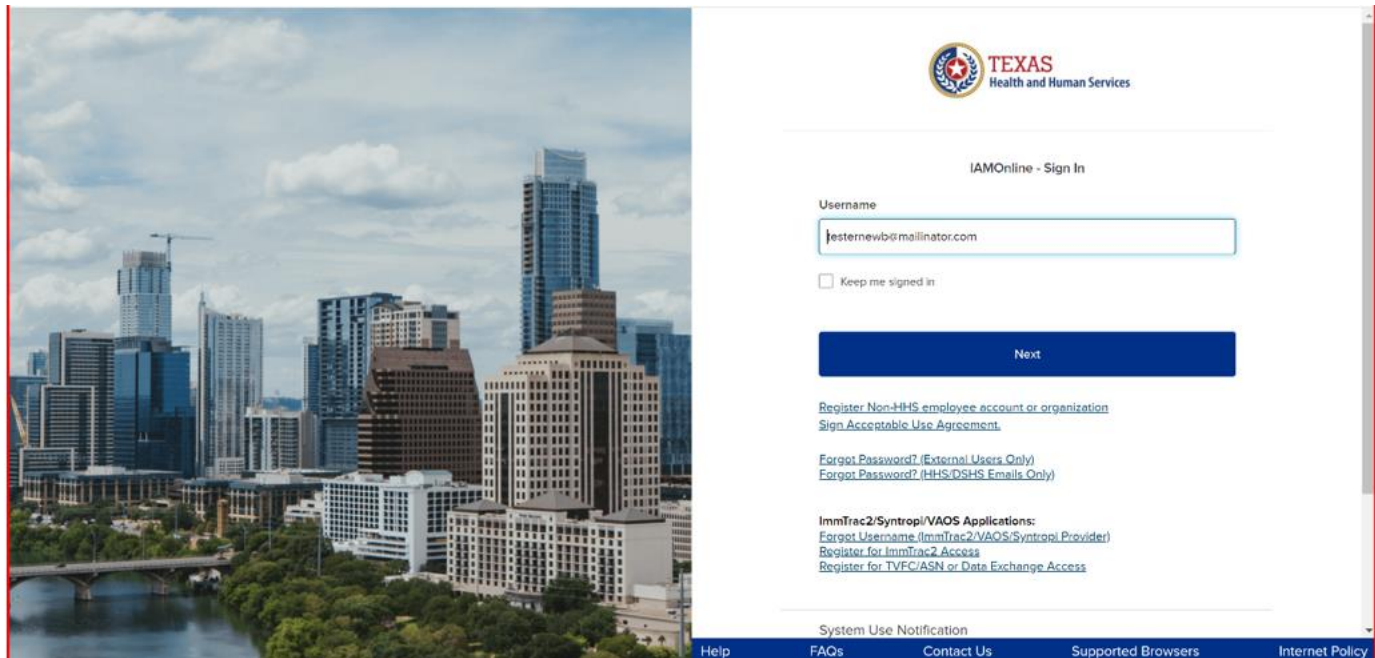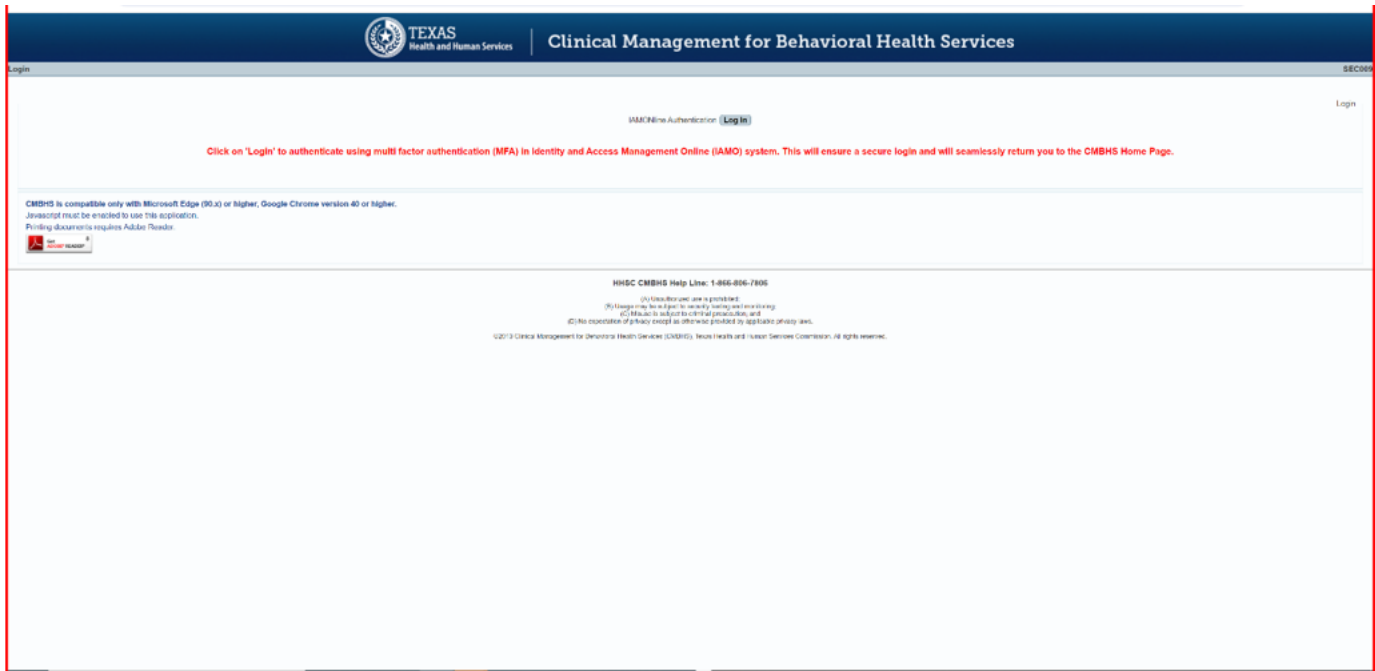Forgot Password? (External Users Only)
Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

TEXAS
Health and Human Services

Verify with your Security Question

testernewb@mailinator.com

Where did you go for your favorite vacation?

•••••   👁

[Verify]

Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access
Register for TVFC/ASN or Data Exchange Access

Help   FAQs   Contact Us   Supported Browsers   Internet Policy

CMBHS
Clinical Management for Behavioral Health Services

09/08/2023 - Build 2003

Provider Tools   Business Office   Data   Account Management   System Management   Help   Logout

Provider: Department of State Health Services   User Name: Garcia, Garry

Home
Find/Add Client

Change Location   SEC00

                                                                                                                                    [Select] [Close]

Change Location
Current Location   Department of State Health Services
New Location   [DEPARTMENT OF STATE HEALTH SERVICES   ▼]

HHSC CMBHS Help Line: 1-866-806-7806

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Home
Find/Add Client

Find/Add Staff   ORG011

New Staff   Provider Detail

Search Criteria
First Name
Last Name   Search
Title
Office Phone
Email Address   newClinicianfive@team527339.testinator

☑ Display Staff with Disabled status

Filter by Character
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #

Staff List
41 Record(s) found

No records found

Previous 1 Next

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Home
Find/Add Client

Find/Add Staff   ORG011

New Staff   Provider Detail

Search Criteria
First Name
Last Name   Search
Title
Office Phone
Email Address   newClinicianfive@team527339.testinator

☑ Display Staff with Disabled status

Filter by Character
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #

Staff List
Staff Detail
1 Record(s) found

Select Staff	Last Name	First Name	Title	Office Phone	Email	Status	User Id	Locations
Select	Clinicianfive	newClinician	newClinician		newClinicianfive@team527339.testinator.com	Disabled	newClinicianfive@team527339.testinator.com	North Texas Behavioral Health Authority

Staff Detail

Previous 1 Next

HHSC CMBHS Help Line: 1-866-806-7806

Home
Find/Add Client

Staff Detail   ORG012

Edit   Staff Search

Staff Information | Location/Roles | Credentials

Person Information
Title
Prefix
Suffix
First Name   newClinician
Middle Name
Last Name   Clinicianfive
Date of Birth

Access
Account Status   Disabled
Dropdown Only User No

Contact Information
Office Phone
Phone Type
Other Phone
Email   newClinicianfive@team527339.testinator.com

HHSC CMBHS Help Line: 1-866-806-7806

TEXAS
Health and Human Services

Verify with your password

newClinicianfive@team527339.testinator.com

Password

....   👁

Verify

Forgot Password? (External Users Only)
Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
Forgot Username (ImmTrac2/VAOS/Syntropi Provider)

TEXAS
Health and Human Services

Verify with your Security Question

newClinicianfive@team527339.testinator.com

Where did you go for your favorite vacation?

•••••   👁 👁

Verify

Verify with something else
Back to sign in

Forgot Password? (External Users Only)
Forgot Password? (HHS/DSHS Emails Only)

ImmTrac2/Syntropi/VAOS Applications:
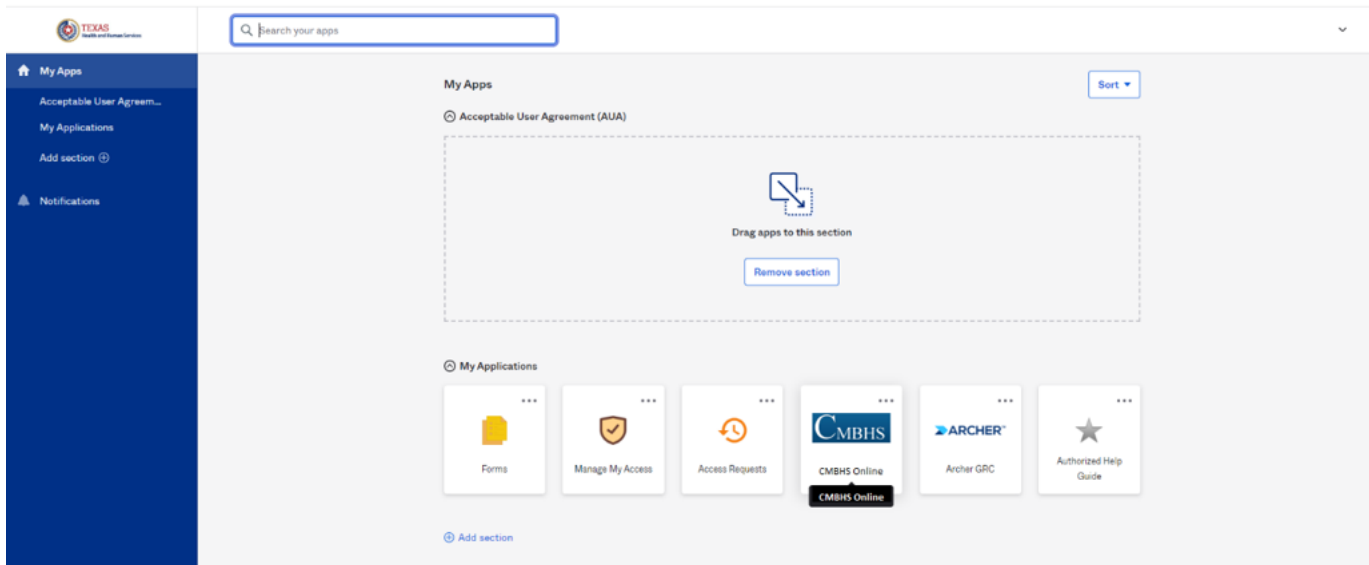Forgot Username (ImmTrac2/VAOS/Syntropi Provider)
Register for ImmTrac2 Access

Roles details:

All CMBHS users can find Client Workspace and Roles detail on CMBHS Online help using a link.
[CMBHS Help file](#)