Emergency Medical Services and Trauma Registries (EMSTR) Organization Administrator Training

November 2023

EMSTR Team

Organization Administrator Training

Audience – Account managers and facility administrators.

Description – This Organization Administrator Training guide provides step-by-step instructions on how to log-in to Emergency Medical Services and Trauma Registries (EMSTR), manage your users' access, and manage your account.

Table of Contents

IAMOnline Process

IAM Online (1 of 2)

- EMSTR will begin using the new Identity and Access Management (IAM) Online platform called **IAMOnline** beginning November 2023.
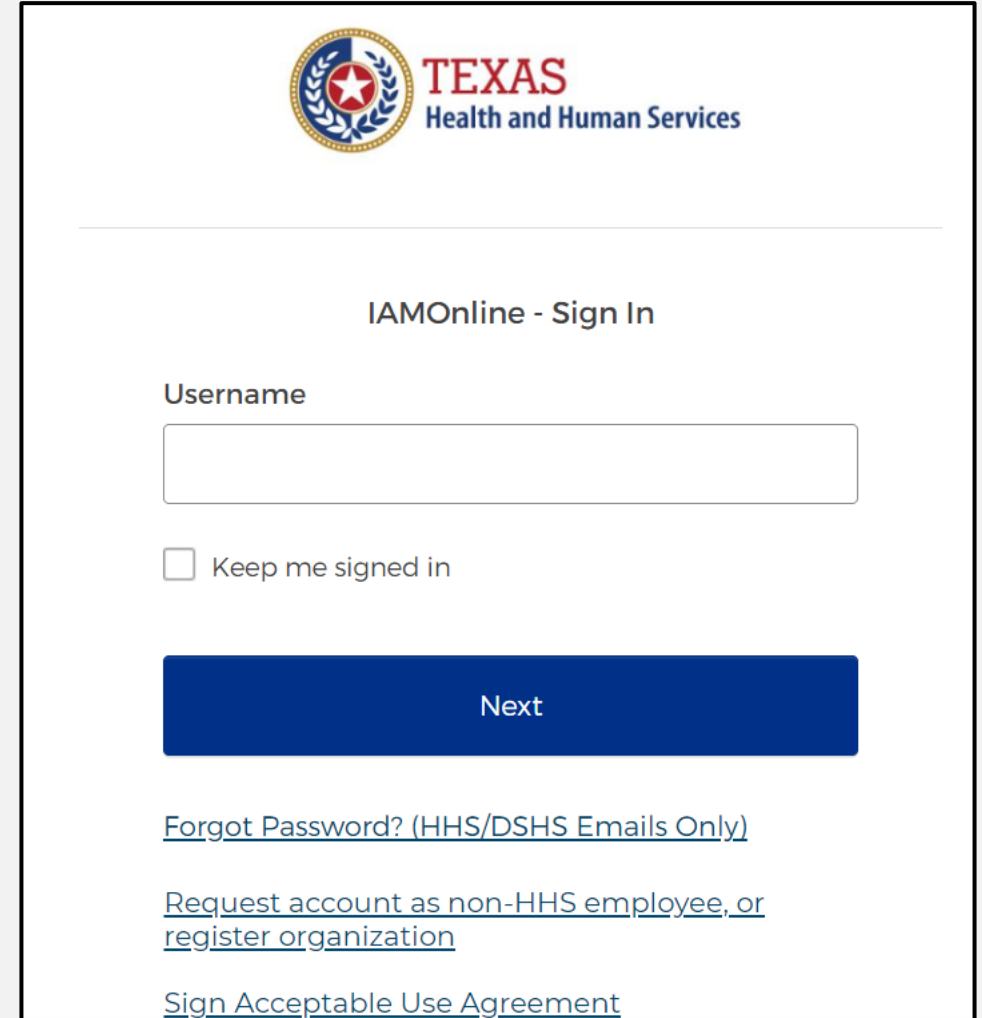
- All Texas Health and Human Services (HHS) applications will be transitioning to **IAMOnline**.

- **IAMOnline** provides a more secure log-in process with multifactor authentication features.

IAM Online (2 of 2)

- Account management capabilities through IAMOnline include:
  - Accessing password resets;
  - Updating your contact information;
  - Updating your security question; and
  - Managing your entity's users.

Entity/Administration Level 3

In the updated EMSTR application, account managers and facility administrators are known as **Entity/Administration (Level 3)** users.

> *For example, a hospital administrator is an **EMSTR Hospital Admin Level 3** user.*

Entity / Administration (Level 3) permissions:
- Available for account managers;
- Manages assigned users through the IAMOnline platform;
- Monitors data submissions;
- Runs reports; and
- Inputs data.

Activate Your Account

- The HHS system will automatically send current users a registration email.

- Locate your Identity and Access Management Online **(IAMOnline)** registration email from noreply@okta.com.

- The automated system will send the activation email to your employee email address.

Hi ▓▓▓▓▓,

Welcome to IAMOnline! Your account is active and ready for use. Access the portal using the below link:

Username: ▓▓▓▓▓@dshs.texas.gov

Activate Account

Please note that the link will only be active for seven (7) days for security reasons.

After accessing IAMOnline for the first time, set up will require a password, a phone number, and a security question for the account. The Acceptable Use Agreement (AUA) must be completed as well.

If you have any questions regarding how to complete this action, please review the IAMOnline Web Help and FAQs. For further help or if this email was received in error, please contact the Help Desk at 512-438-4720 or 855-435-7181 (toll-free), 7:00 A.M. and 7:00 P.M. Central Time (CT), Monday–Friday.

Thank you,

IAM Team

- Your **Username** is provided in the email.

- Click the **"Activate Account"** button to set up your account.

NOTE: The link will only be active for seven (7) days from receipt of email for security reasons.

Hi ▮▮▮▮▮,

Welcome to IAMOnline! Your account is active and ready for use. Access the portal using the below link:

Username: ▮▮▮▮▮@dshs.texas.gov

[Activate Account]

Please note that the link will only be active for seven (7) days for security reasons.

After accessing IAMOnline for the first time, set up will require a password, a phone number, and a security question for the account. The Acceptable Use Agreement (AUA) must be completed as well.

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Thank you,

IAM Team

Set up security methods to protect your account with a **password**, your **phone**, and a **security question.**

Set up security methods

⊘ _____@dshs.texas.gov

Security methods help protect your IAMOnline account by ensuring only you have access.

Set up required

🔒 **Password**
Choose a password for your account
Used for access

Set up

📞 **Phone**
Verify with a code sent to your phone
Used for access or recovery

Set up

🛡 **Security Question**
Choose a security question and answer that will be used for signing in
Used for recovery

Set up

Back to sign in

Create a new account as a citizen

Request account as non-HHS employee, or register organization

Sign Acceptable Use Agreement

Set Up Security Methods (2 of 2)

- The first security method is to set up your password.

- To create your password, click the **"Set up"** button under **Password**.
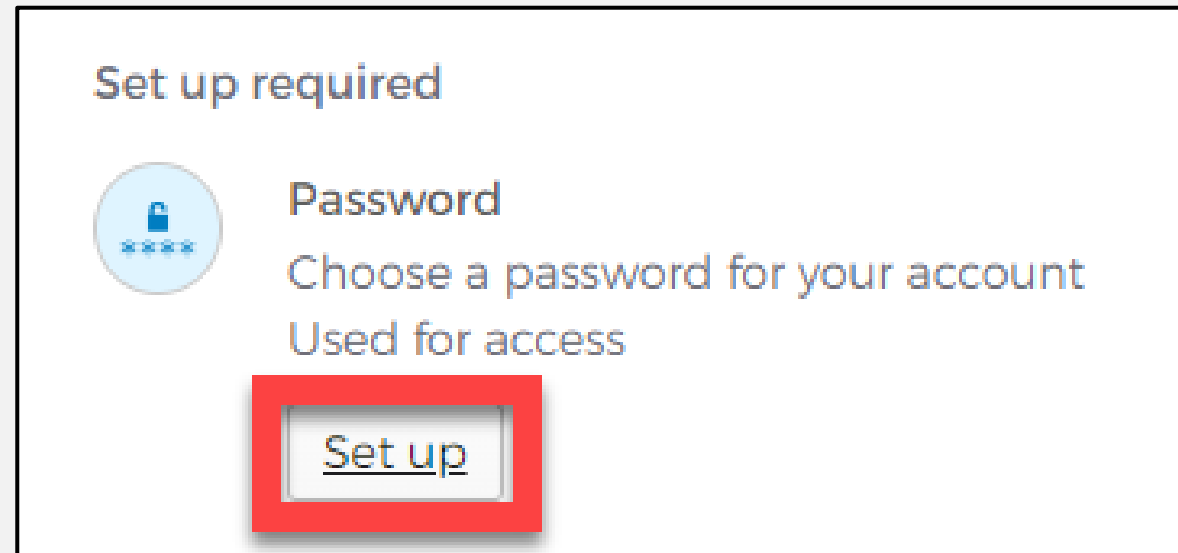
Set Up Password

- Create your password in the "**Enter password**" text box and re-enter it in the "**Re-enter password**" text box.
  NOTE: You must create a password that meets all requirements set by the organization.

- Click the **"Next"** button.

Set Up Security Methods Screen

Click on the **"Set up button"** under **Phone**.

- To set up your phone number, first select the "**SMS**"* or **"Voice call"** option.

   *The **SMS** option will send a text message to your phone, and the **Voice call** option will send an automated call.*

- Verify your account by entering your ten-digit phone number and select "**Receive a code**".
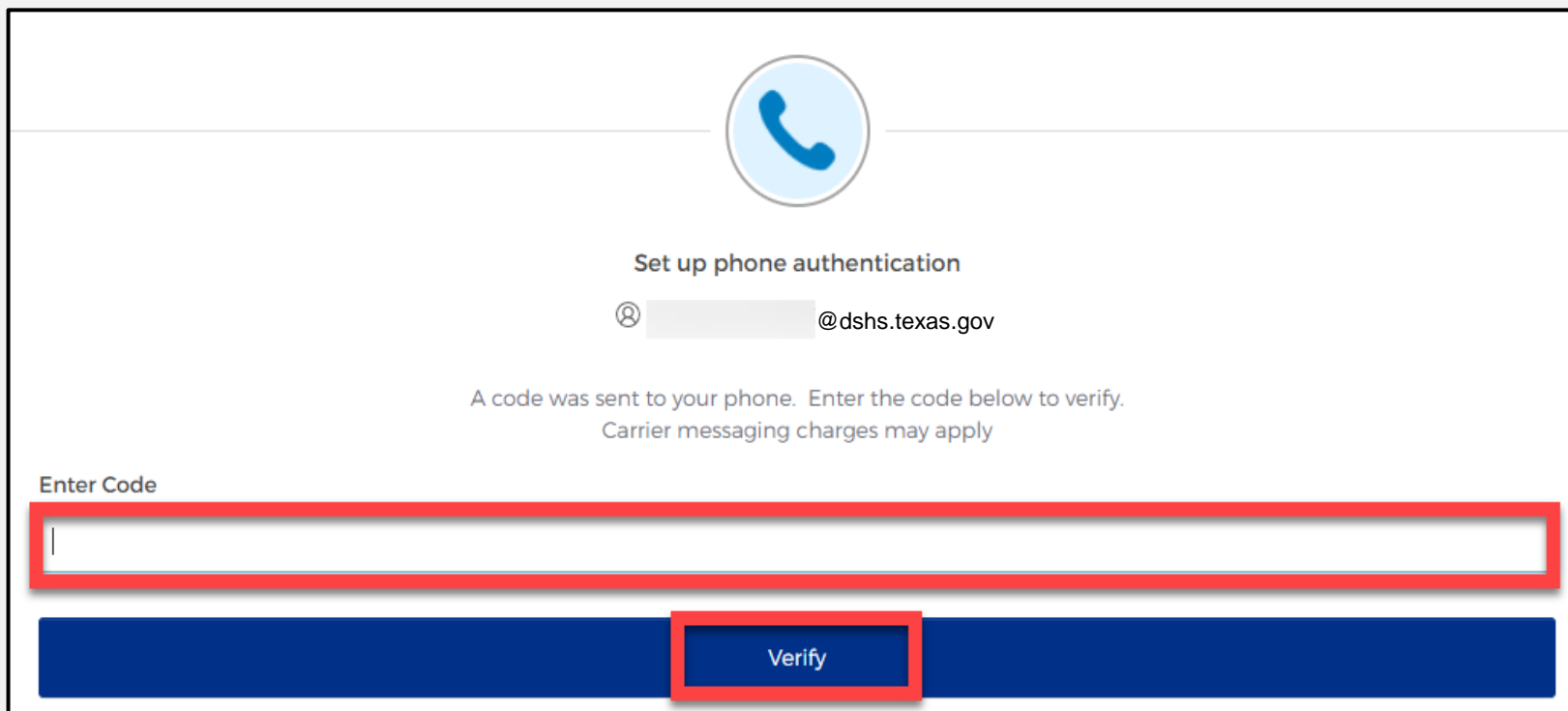
Enter your phone number to receive a verification code via SMS.

⊙ SMS

○ Voice call

Country

United States ▾

Phone number

+1 [ ]

Receive a code via SMS

*SMS stands for Short Message Service.

- The automated system will send you a verification code to your phone via the delivery choice you made – SMS or Voice call.

- Type the verification code you received in the **"Enter Code"** box.

- Click the **"Verify"** button.
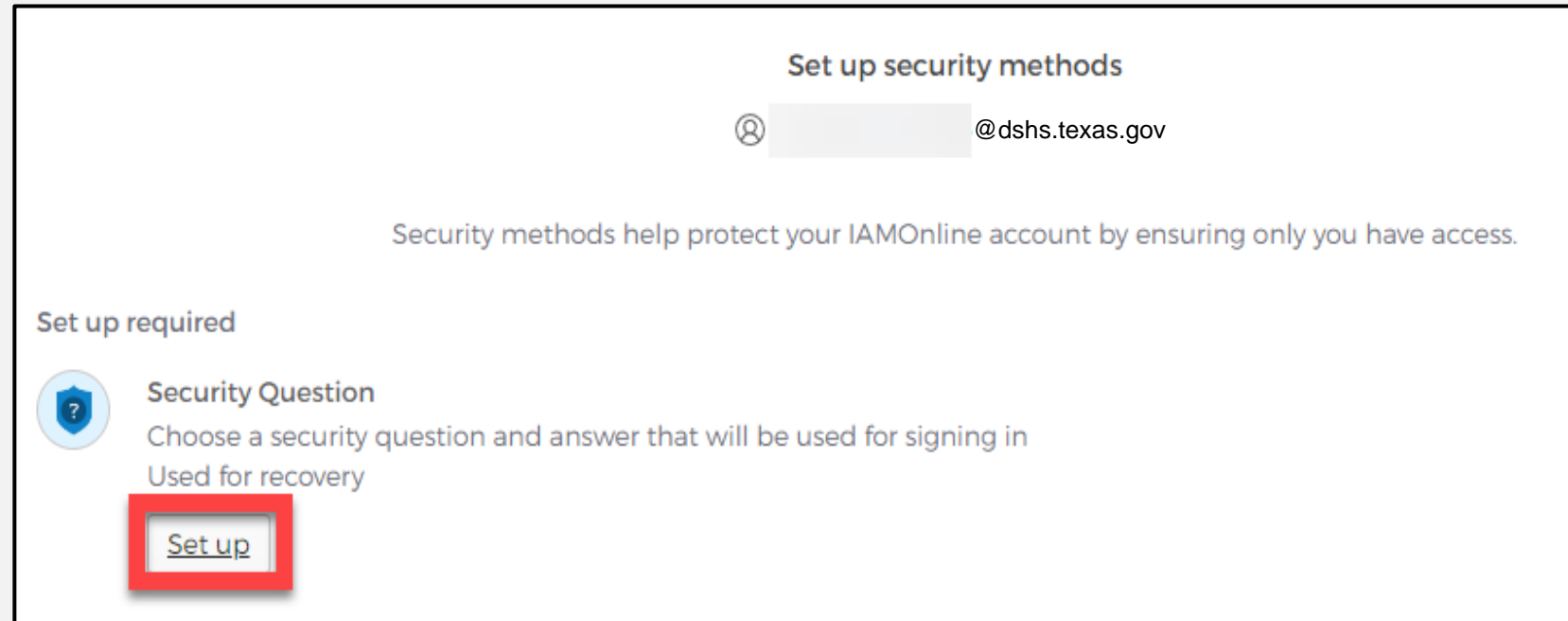
Set Up Security Methods

- After verifying your phone number, the system will redirect you to set up a **Security Question**.

- To set up your security question, select the **"Set up"** button under **Security Question.**

You can either select an option to **"Choose a security question"** or **"Create my own security question"**.
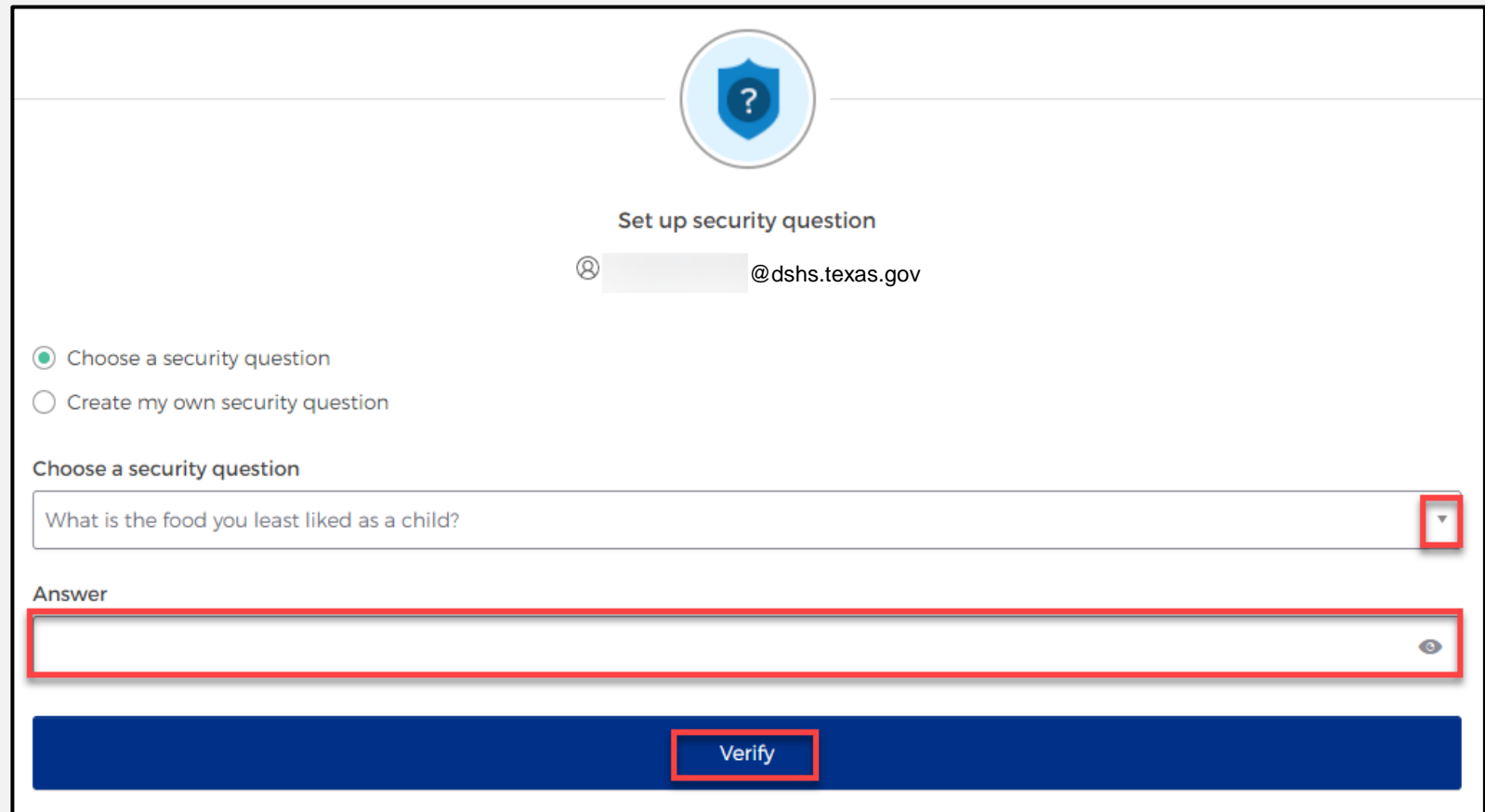
NOTE – If creating a security question, create one that cannot be guessed by others, even those who know you well, for security purposes.

Set up security question

@dshs.texas.gov

◉ Choose a security question
○ Create my own security question

Choose a security question

What is the food you least liked as a child? ▾

Answer

Verify

- After selecting **"choose a security question"**, select the drop-down icon and choose a security question.
- Enter the answer in the **"Answer"** box.
- To save your question and answer, select the **"Verify"** button.

Set up security question

@dshs.texas.gov

- ⦿ Choose a security question
- ◯ Create my own security question

Choose a security question

What is the food you least liked as a child?   ▼

Answer

[   ] 👁

Verify

Access the MyApps Dashboard

Now that you have set up your security methods, the system will redirect you to your IAMOnline **"MyApps"** dashboard.
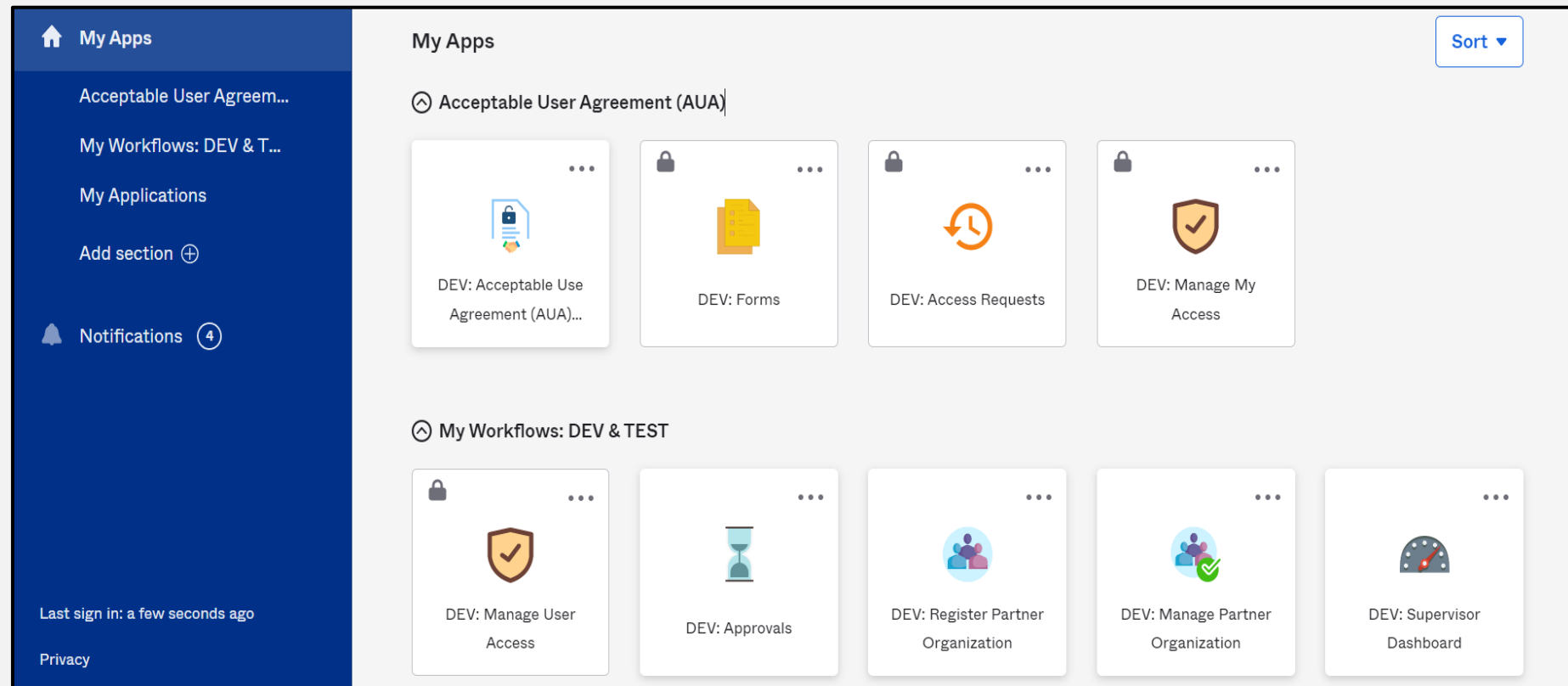
Acceptable Use Agreement (AUA)

- All tiles display with a "lock" icon until you acknowledge and sign the AUA form.

- To begin the unlock process, select the **"AUA tile"** on your **MyApps** dashboard.
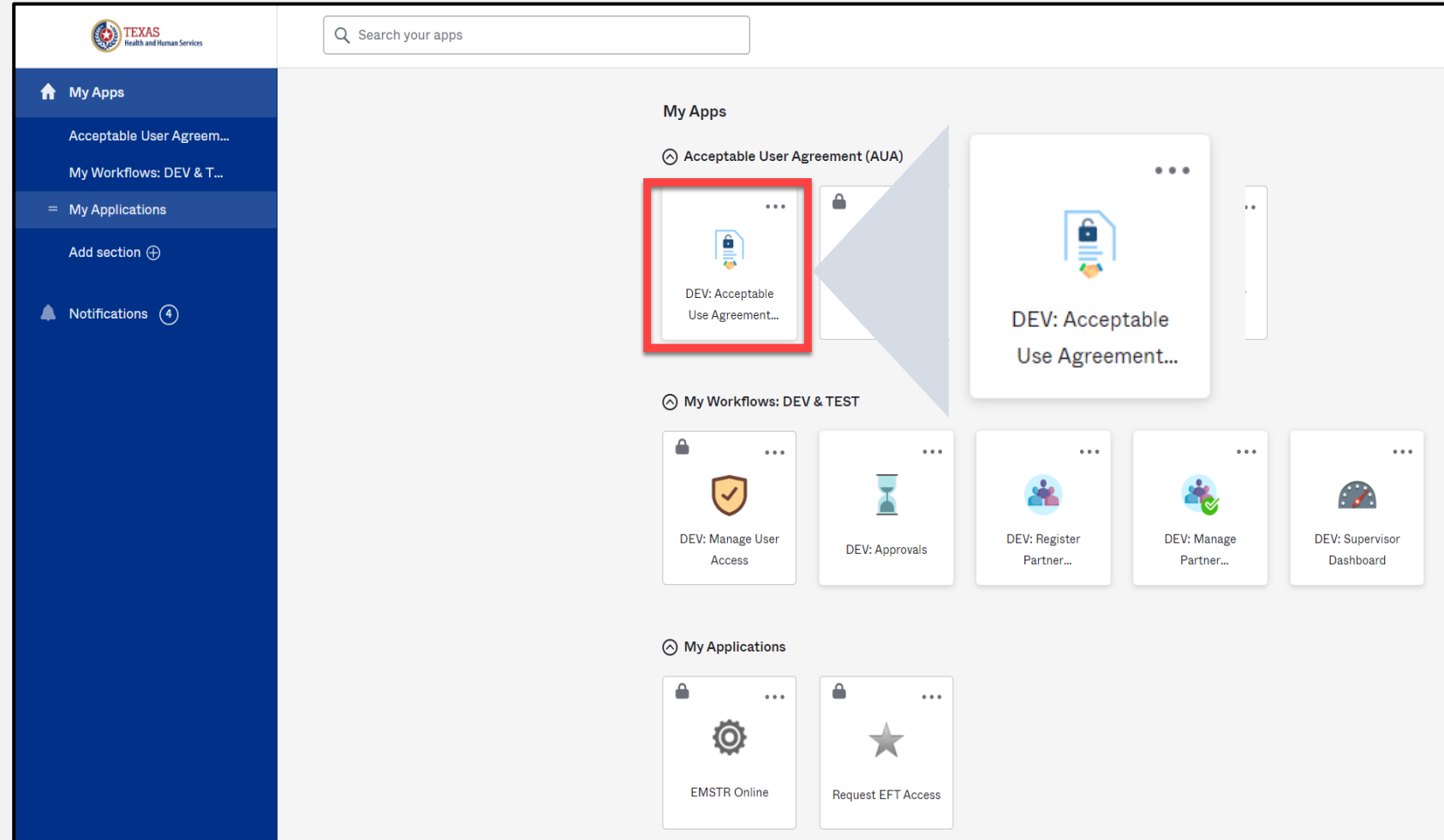
Acknowledge and Sign your AUA

- Carefully read and complete the AUA Form.

- Select **"An employee of another agency".**

- Once you complete the mandatory information and sign the form, click the **"Submit"** button to complete it.

Acknowledgement

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

First Name

First Name *

Last Name

Last Name *

Your Work Email *

[   ]@dshs.texas.gov

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)

Date Agreement Signed *

08/09/2023

Submit

Submit

Access EMSTR

- Once you complete the AUA form, your tiles on the **MyApps** dashboard will unlock.

- To access EMSTR, select the "**EMSTR Online**" tile.

My Apps

⌃ Acceptable User Agreement (AUA)

DEV: Forms

DEV: Access Requests

DEV: Manage My Access

⌃ My Workflows: DEV & TEST

DEV: Manage User Access

DEV: Approvals

Supervisor Dashboard

⌃ My Applications

EMSTR Online

Request EFT Access
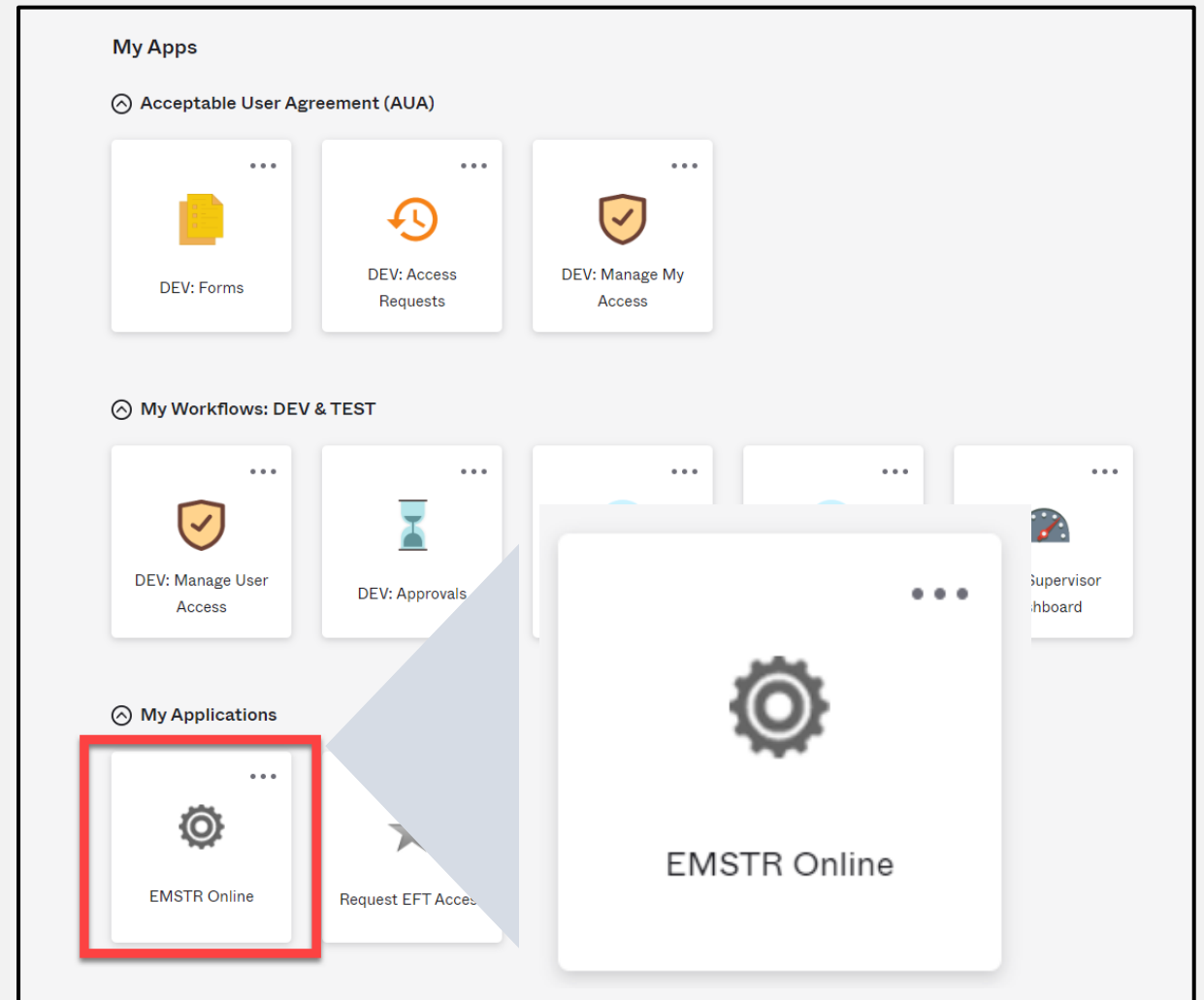
EMSTR Online

Once you select the **EMSTR Online** tile, the system will redirect you to the EMSTR homepage.

Reviewing the Entity Record Summary

Entity Facility

- To view your entity information, select **"Entity"** from the navigation bar.
- This example shows **"Entity >Hospital >Hospital Facility"**.

Hospital Facility Example

To view your entity information, select **"Record Details"**.

Note –The row you select will be highlighted.

Entity Record Summary Example (1 of 2)

The **Record Summary** screen provides an overview of the entity's record submissions.

Record Summary (Hospital)

Basic Information

Record ID	544
Record Type	Hospital
Primary Hospital	
Status	Active
Notifications	General Notifications
	Concerns
DSHS ID	2271173

Edit Entity Information

Notes

255 characters remaining.

✔ Save

Notes Details

UserName	Entry Date	Notes
No records found.		

Record Data | Concerns | Record History

Question Packages

Question Package	Hospital	Last Update	Updated By	Status
Administrative				Incomplete
General Information				Incomplete
Entity Import Information				Incomplete

There are **three** main sections on this screen – **Basic Information**, **Notes**, and **Question Packages.**

Basic Information	
Record ID	544
Record Type	Hospital
Primary Hospital	
Status	Active
Notifications	General Notifications ConcernsPlease see Concerns tab for XSD messages.
DSHS ID	2271173

Edit Entity Information
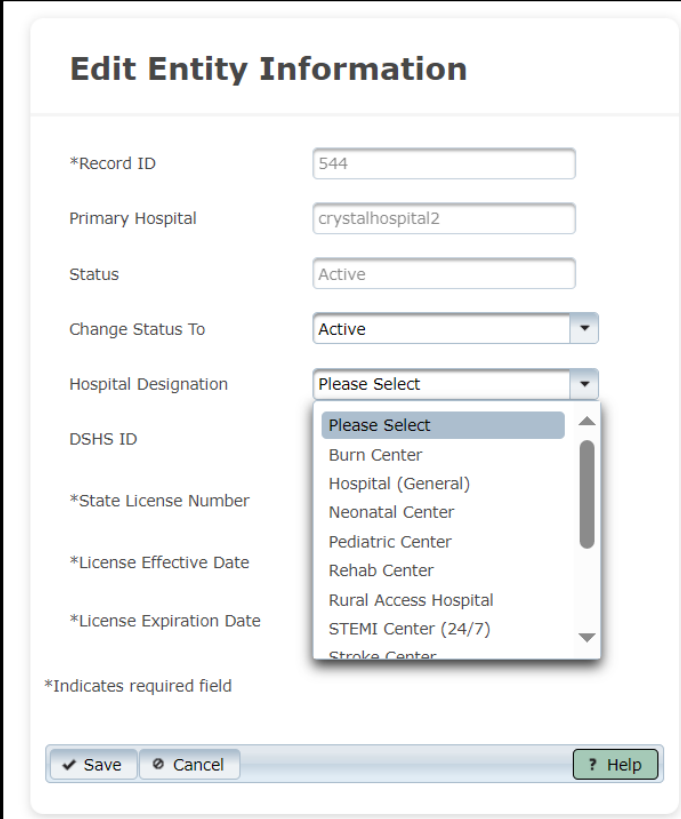
- **Record ID** – Unique identification (ID) assigned by the system.
- **Record Type** – Type of event (varies based on facility type.)
- **Primary Hospital** – Hospital name.
- **Status** – Current status of event.
- **Notifications** – Custom information (e.g., system will provide XSD rule violations that you need to review and correct).
- **DSHS ID** – Unique facility number.

Click **"Edit Entity Information"** to update your information.
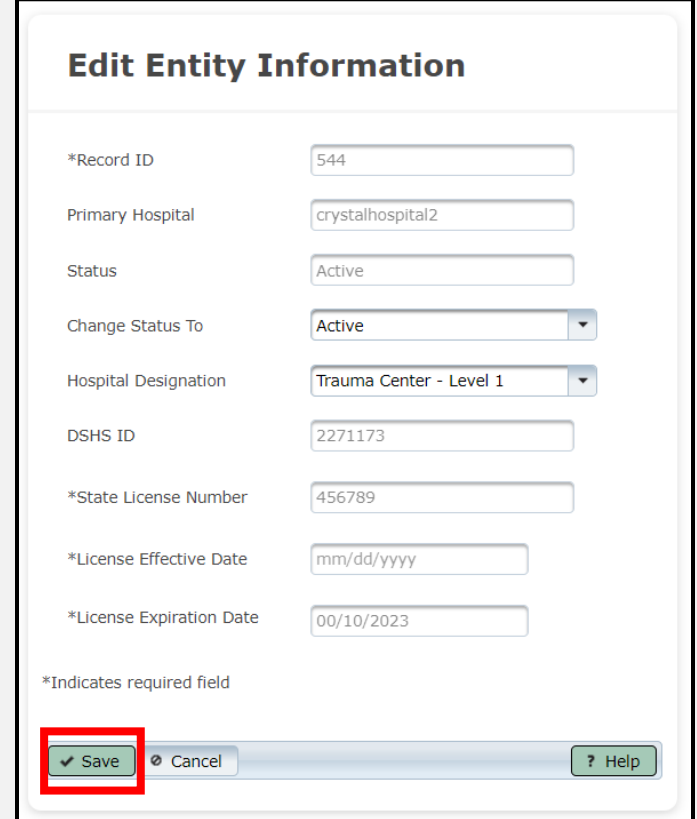
Choose the appropriate option from the **Hospital Designation** drop-down field and click **"Save"**.

Note – Most fields are not editable.

Notes Example

In the notes section, DSHS can enter additional comments or information regarding your entity. Facility organization administers can see the notes.

Facility Question Packages (1 of 2)

Question Packages are groups of questions that share a common theme.

Record Summary (Hospital)

Basic Information

Record ID	544
Record Type	Hospital
Primary Hospital	crystalhospital2
Status	Active
Notifications	General Notifications Concerns
DSHS ID	2271173

Edit Entity Information

Notes

255 characters remaining.

✔ Save

Notes Details

UserName	Entry Date	Notes
No records found.		

Record Data | Concerns | Record History

Question Packages

Question Package	Hospital	Last Update	Updated By	Status
Administrative				Incomplete
General Information				Incomplete
Entity Import Information				Incomplete

Click a **"Question Package"** link to input information.

	Question Packages			
Question Package	**Hospital**	**Last Update**	**Updated By**	**Status**
Administrative				Incomplete
General Information				Incomplete
Entity Import Information				Incomplete

Record Data | Concerns | Record History

Complete Question Package (1 of 2)

Enter the required information indicated by asterisks (*). In this example, the user selected the **Entity Import Information Question Package**.

Entity Import Information Question Package Example

Complete all sections of the question package and click **"Save"**.

Complete Question Packages

The **Record Data** tab shows the **Question Packages** and additional details:
- **Hospital** name;
- **Last Update** date;
- **Updated By**; and
- **Status**.

| Record Data | Concerns | Record History |

Question Packages				
Question Package	**Hospital**	**Last Update**	**Updated By**	**Status**
Administrative		10/23/2023		Complete
General Information		10/23/2023		Complete
Entity Import Information		10/23/2023		Complete

Concerns Tab

- The **Concerns** tab shows a history of logged concerns. Concerns can be added by:
  - DSHS personnel;
  - Organization administrators; and
  - Automatically generated.
- Click **"Add Concern"** to create a new concern.

- Type the concern in the **"Description"** box;
- Select the appropriate **Severity** from the drop-down field;
- Specify if the **Status** of the issue is 'active' or 'resolved';
- Add additional notes if needed; and
- Click **"Save"**.

The system will show submitted concerns in the **Concerns** table with details.

Record History

The **Record History** tab shows the list of updates with details such as **Time, Event**, **Message**, and **User**.

Business Associate Agreements (1 of 3)

- The EMSTR team will review all business associate agreements (BAAs) before allowing access to data between parties.

- The entity decides the BAA format. Please visit EMSTR webpages for examples.

- EMSTR requires a BAA if your entity wishes your Regional Advisory Council (RAC) or a third-party (e.g., vendor, billing company etc.) to have access to and/or submit data for your entity.

- Both parties (entity and third-party/RAC) must complete and sign the BAA.

Entities must follow three steps to receive DSHS EMSTR approval:

    Step 1 – Submit a signed agreement by someone representing the entity's administration (e.g., hospital or EMS administrator, chief executive officer, medical director, etc.)

    Step 2 – Check both parties (the vendor and the entity) signed the BAA and the form includes an effective date and an expiration date (typically two years).

    Step 3 – Send the BAA to injury.web@dshs.texas.gov for EMSTR account access approval.

For EMSTR to approve a third-party request to create an account, the third-party vendor must complete two steps:

Step 1 – If an entity wishes a third-party (e.g., vendor, billing company, etc.) to have access to and/or submit data on their behalf, both parties must complete a BAA.

Step 2 – Contact injury.web@dshs.texas.gov to request the entity information required in the registration form:
- Employer organization name;
- Tax Identification Number (TIN); and
- Agency sponsor email address.

Adding a User Approval Process

Each facility user request will go through a three-tier approval process:

- Facility or organization administrator approval;
- Data steward (DSHS staff) approval; and
- Data owner (DSHS program management) approval.

EMSTR User Types

Application access is grouped by role. There are three EMSTR application role types:

- EMSTR View Only Level 1;
- EMSTR Add/Edit Level 2; and
- EMSTR Admin Level 3.

Examples:

- **EMSTR View Only Level 1 –** End-users who need limited application access.
- **EMSTR Add/Edit** Level **2 –** Facility users who submit data for their facility but are not facility administrators.
- **EMSTR Admin Level 3** – Organization / facility administrators.
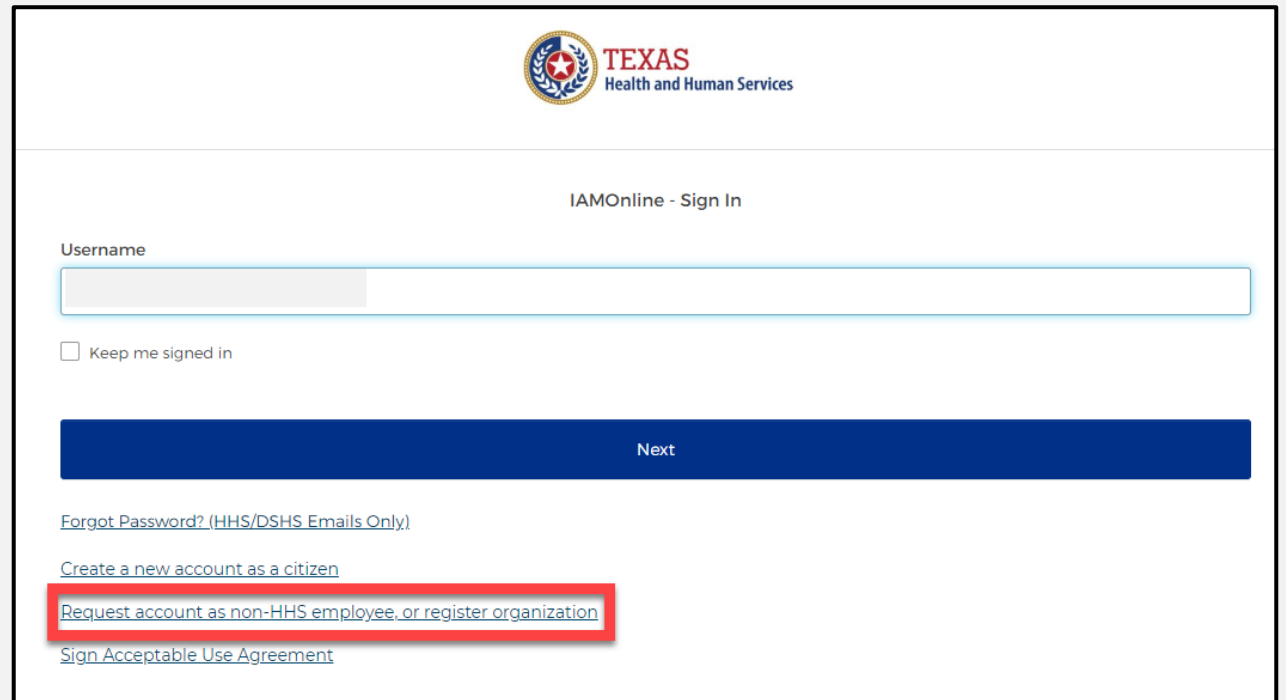
Adding a User Process (1 of 2)

Step 1 – The user requests an IAMOnline account and provides the facility's organization name;

Step 2 – The facility administrator approves the IAMOnline account request;

Step 3 – The user receives an IAMOnline account activation email from OKTA;

Step 4 – The administrator submits the EMSTR access request on the user's behalf or the user submits their own request;

Step 5 – The facility administrator approves the EMSTR access request;

Step 6 – The account goes through two additional (DSHS-led) approvals; and

Step 7 – The user receives access to EMSTR and the requested facility data.

IAMOnline Account Request

A facility user must first request an IAMOnline account for their facility.

> **Note** – The facility name must match <u>exactly</u> as displayed in the EMSTR system.

Supervisor Dashboard (1 of 2)

Facility administrators can select the **Supervisor Dashboard** tile to:
- View access requests;
- Manage facility users; and
- Track requests.
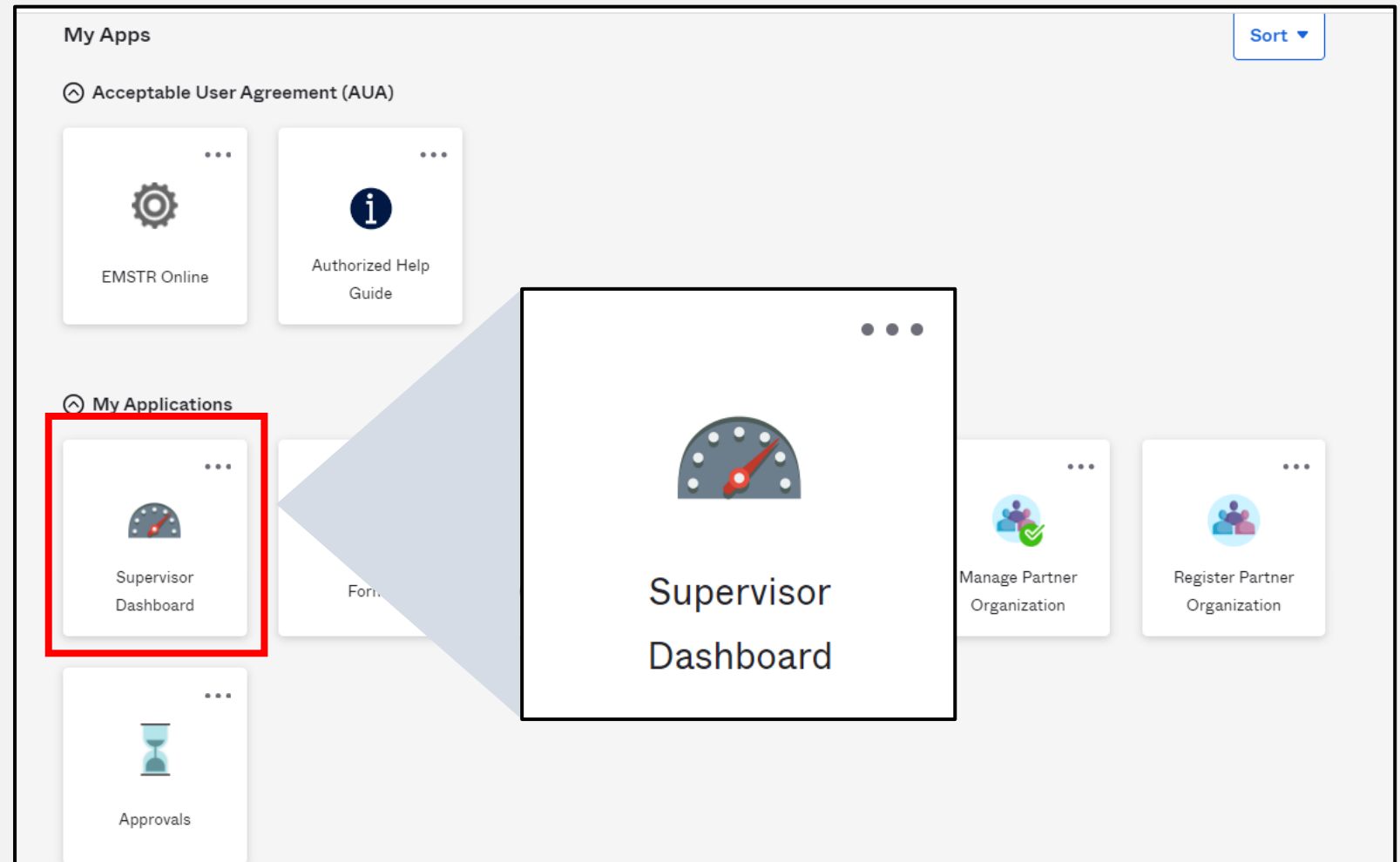
The **Approvals** tile shows how many request(s) the organization administration needs to review.
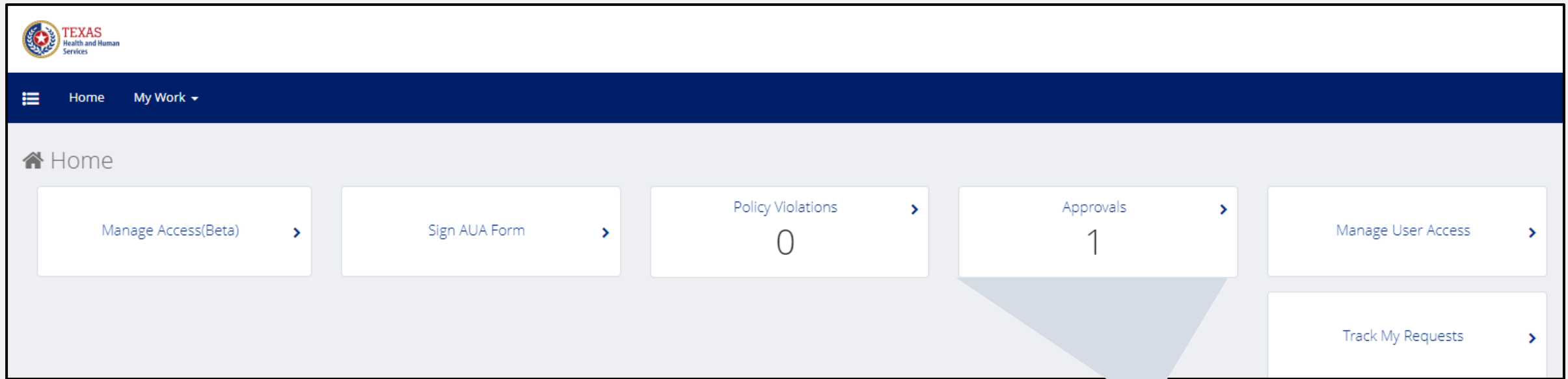
Click the **"Approvals"** tile to review requests.

Note – The tile will turn blue.
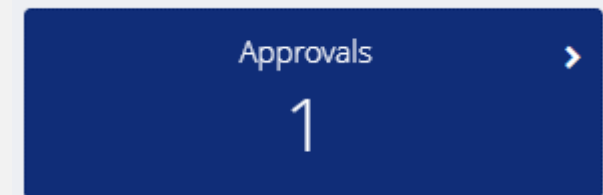
Approvals

Your facility account requests will display on the **Approvals** screen.

Click **"Approve"** to approve a request.

Complete Access Approval

- After selecting **Approve**, a pop-up **Complete Approval** box will appear.
- Click **"Complete"** to confirm the account update.
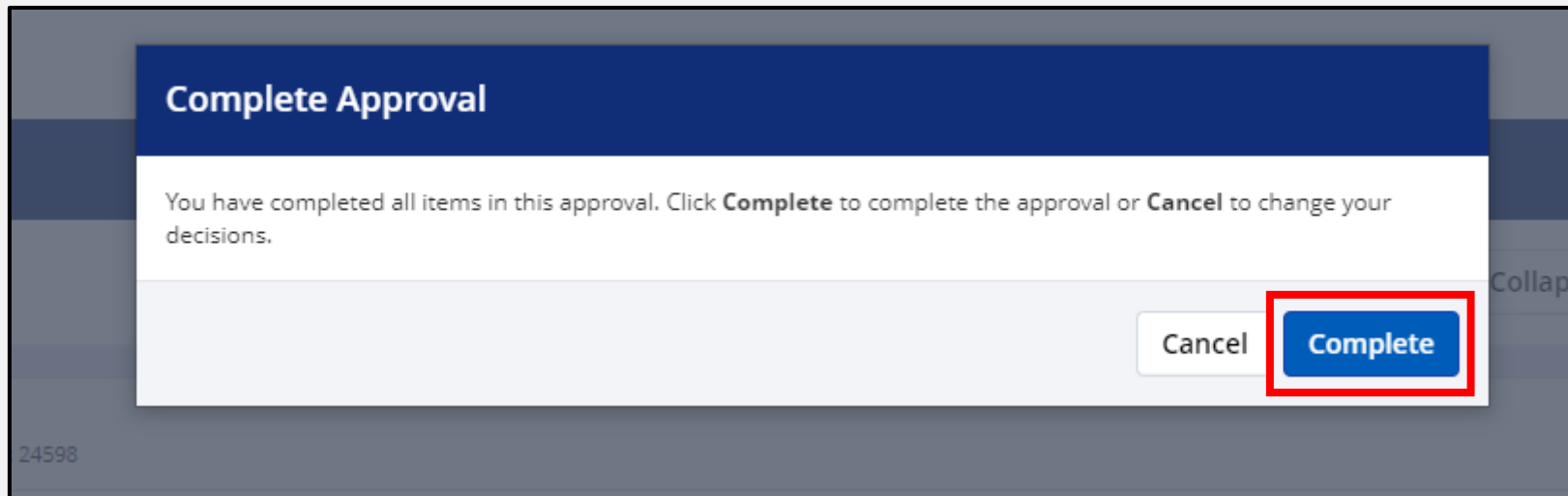
Removing a User from Your Entity

Removing a User

- All users can remove their own EMSTR access in IAMOnline.

- This section will provide instructions for facility administrators to remove a user from their facility.

Manage User Access

To remove a user, click on the "**Manage User Access**" tile from **MyApps** dashboard.

Note – Removing a user's access does not require a verification process. The user will immediately lose EMSTR access.
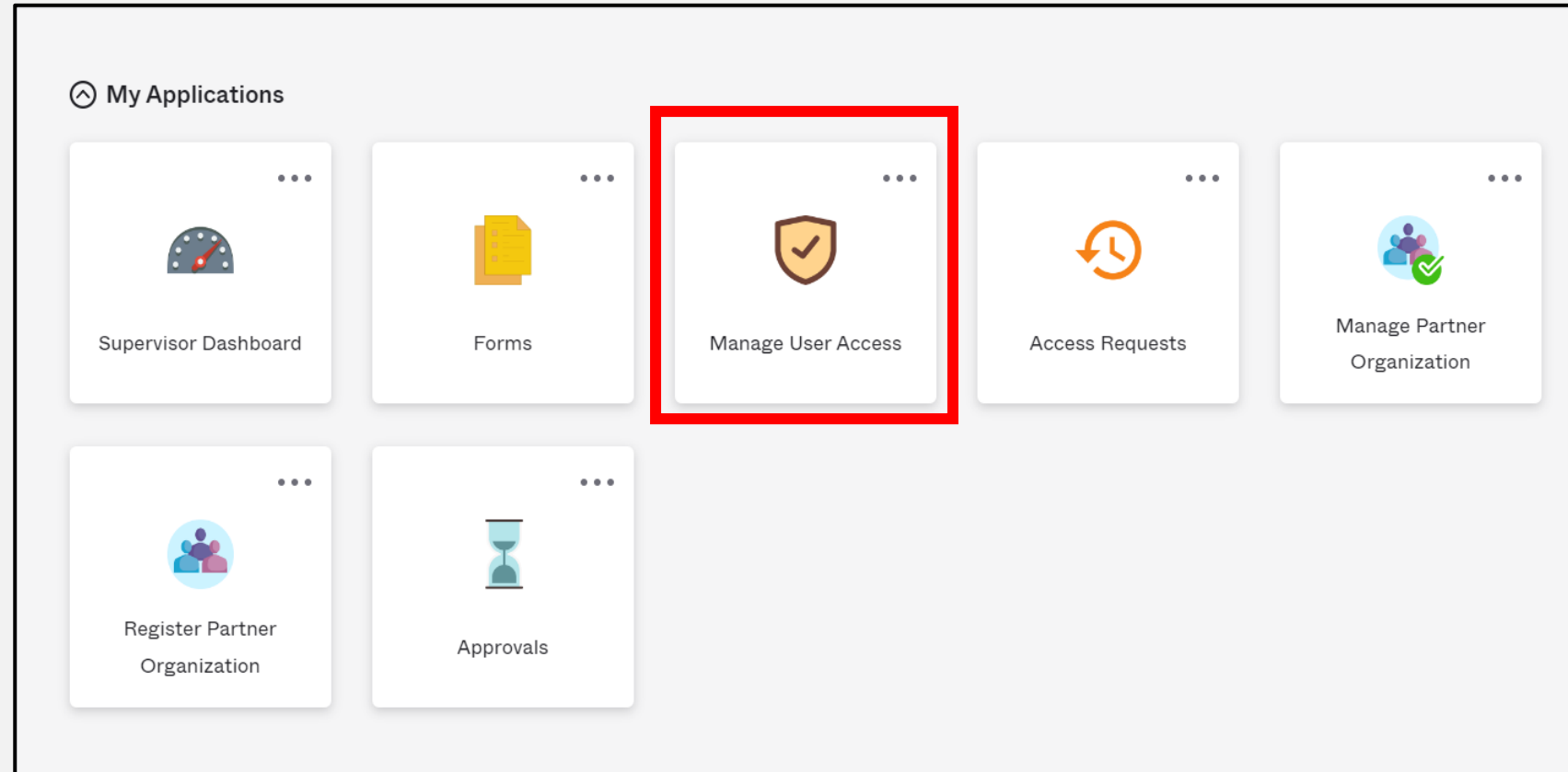
Select Users (1 of 2)

Select the user by clicking the checkmark box by their name.

- The checkmark box will turn green.
- After selecting the checkmark box icon, click the "**Next**" button.

- Select the **"Remove Access"** button.
- The box will turn from white to grey.

Manage Access (2 of 4)

- Type **"EMSTR"** in the text box.
- Click the "**magnifying glass icon"** button.

- Select the assigned role by clicking the "**X**" icon.
- The **X** icon will turn from white to red.

Click the "**Next**" button.

Click the **"message bubble"** icon button to type a comment. All removals require a comment.
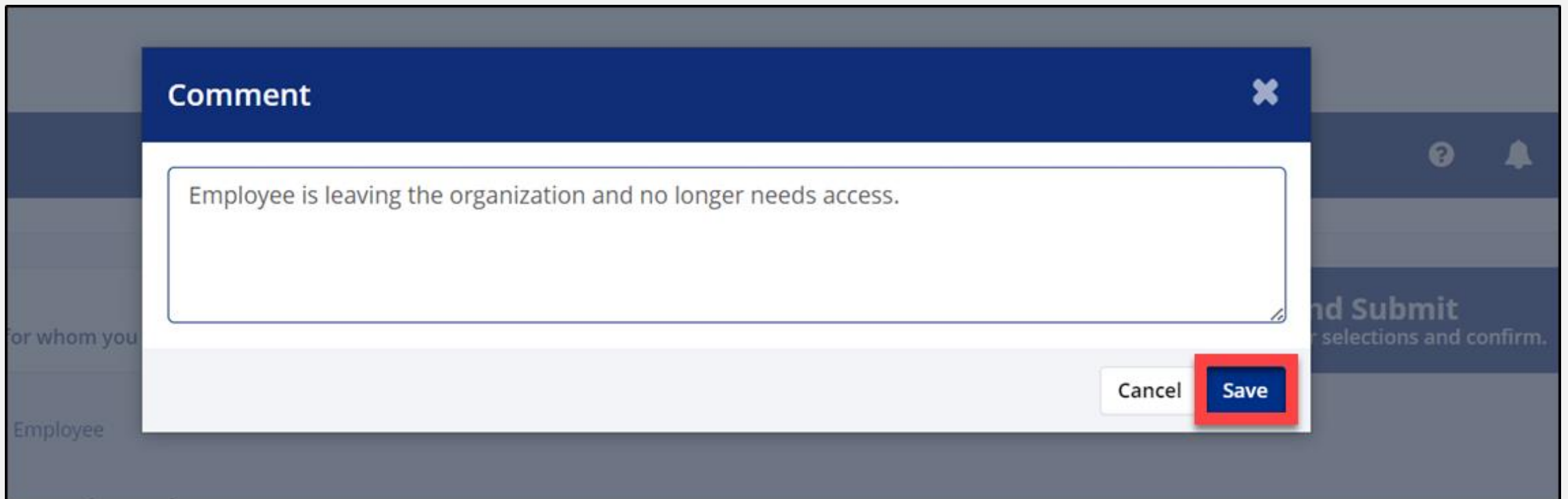
Add a Comment

- Type a comment in the text box.
- Click the "**Save**" button.

    Note – The system requires you to add a comment. An example comment is shown below.

Review and Submit (2 of 2)

- After you leave a comment, the message bubble will turn from white to green.
- Click "**Submit**".
- **Reminder** – the selected user will <u>immediately</u> lose EMSTR access.

Verify User Removal

To verify the user is removed, click the "**Track My Requests**" tile.
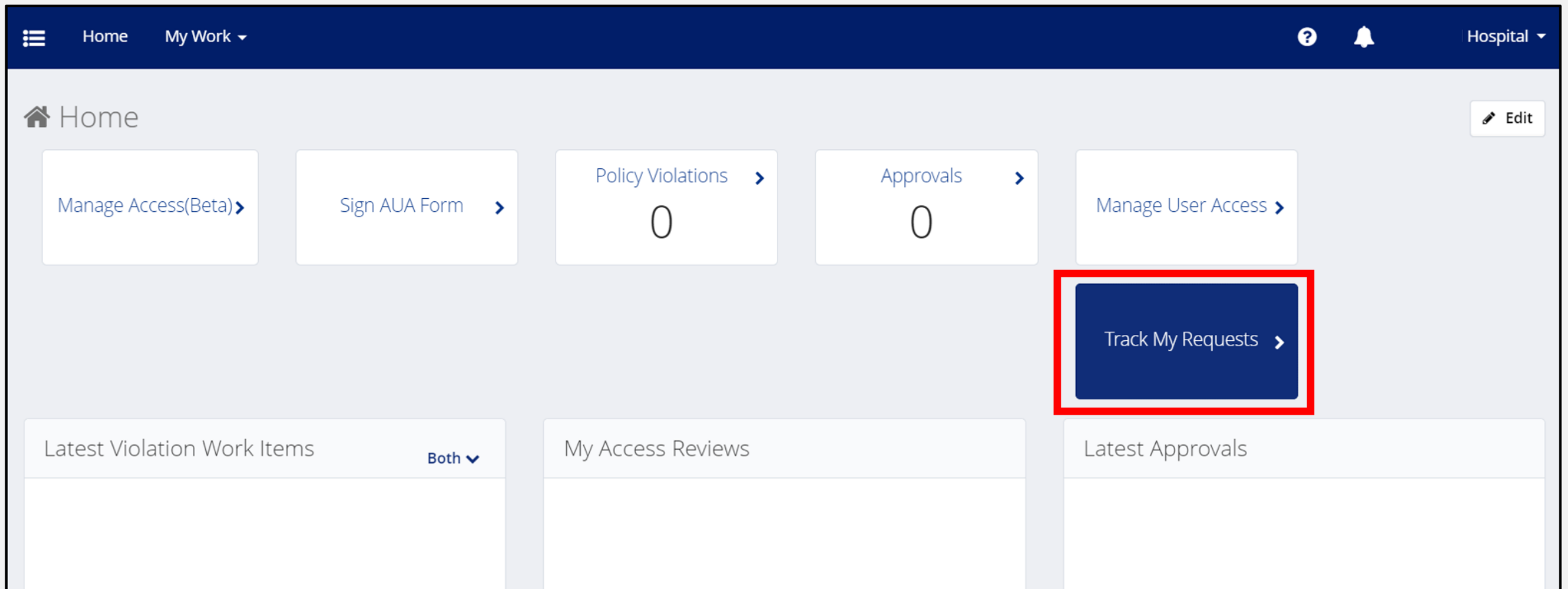
Access Requests

- **Access Request** details will display indicating:
  - **Request Access** by "employee name";
  - **Request** completion date; and
  - The type of role removal.
- Removing access is <u>immediate</u> and does not require further verification.

Manager User Access

- After approving the account request, you must assign the appropriate EMSTR access.
- Click "**Manage Partner organization**" from the **Manage Partner organization** menu.
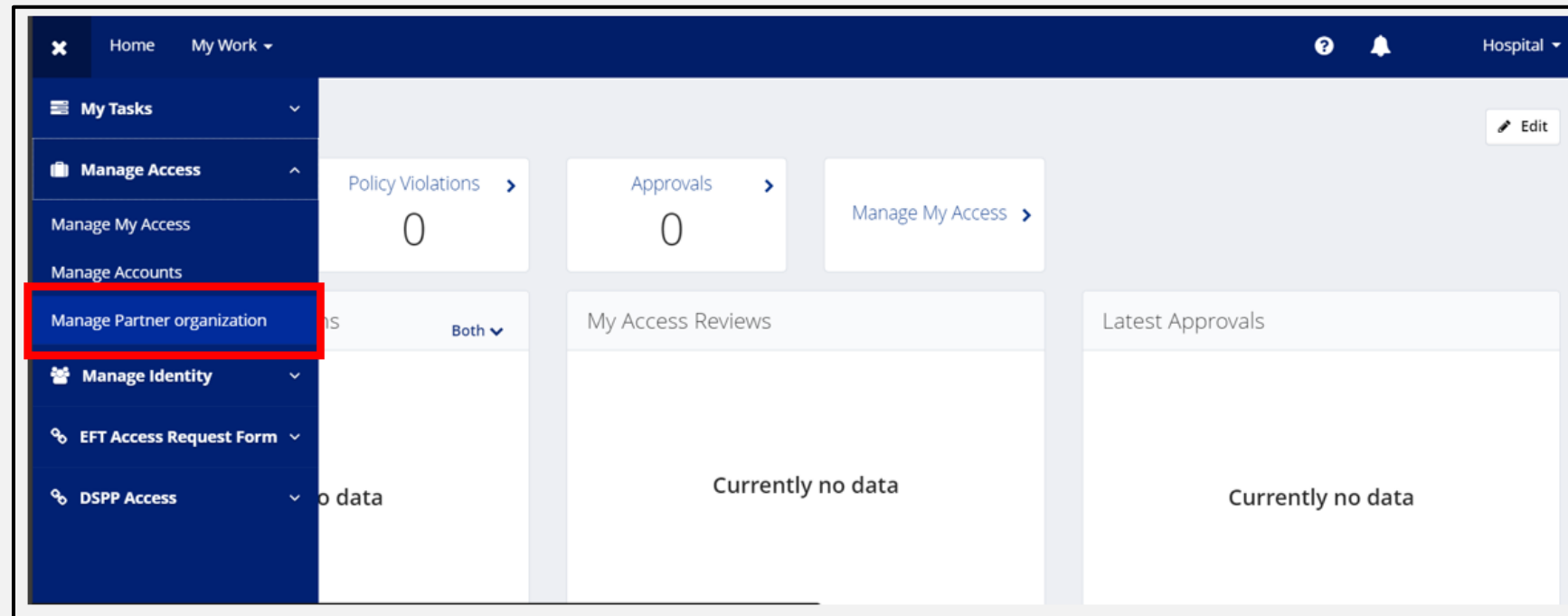
Select Users

- Select the user by clicking the checkmark box – it will turn green.
- Click the "**Next**" button.

Type **"EMSTR"** in the text box and click the magnifying glass icon.

Note – The **"Identities Selected"** is the user you are managing access for your organization.

- Choose the appropriate access level by clicking the checkmark box – it will turn green.

- Click "**Next**".

Review and Submit Adding Access

Click the message bubble icon. This step is required.

Business Justification / Assignment Note

- Type a justification for approving the request. An example is shown here.

- The EMSTR system requires a comment for all requests.

- Click the "**Save**" button.

Business Justification and Assignment Note

Business Justification	Assignment Note

Approving request for [user] to access [facility]

Cancel   Save

Review and Submit Access Request

- The message bubble will turn green.
- Click the "**Submit**" button.

More Info Needed

A pop-up screen will appear, click the "**Complete Form**" button.

Complete Work Item

Review details and click the "**Approve**" button.

Complete Approval

Click the "**Complete**" button.
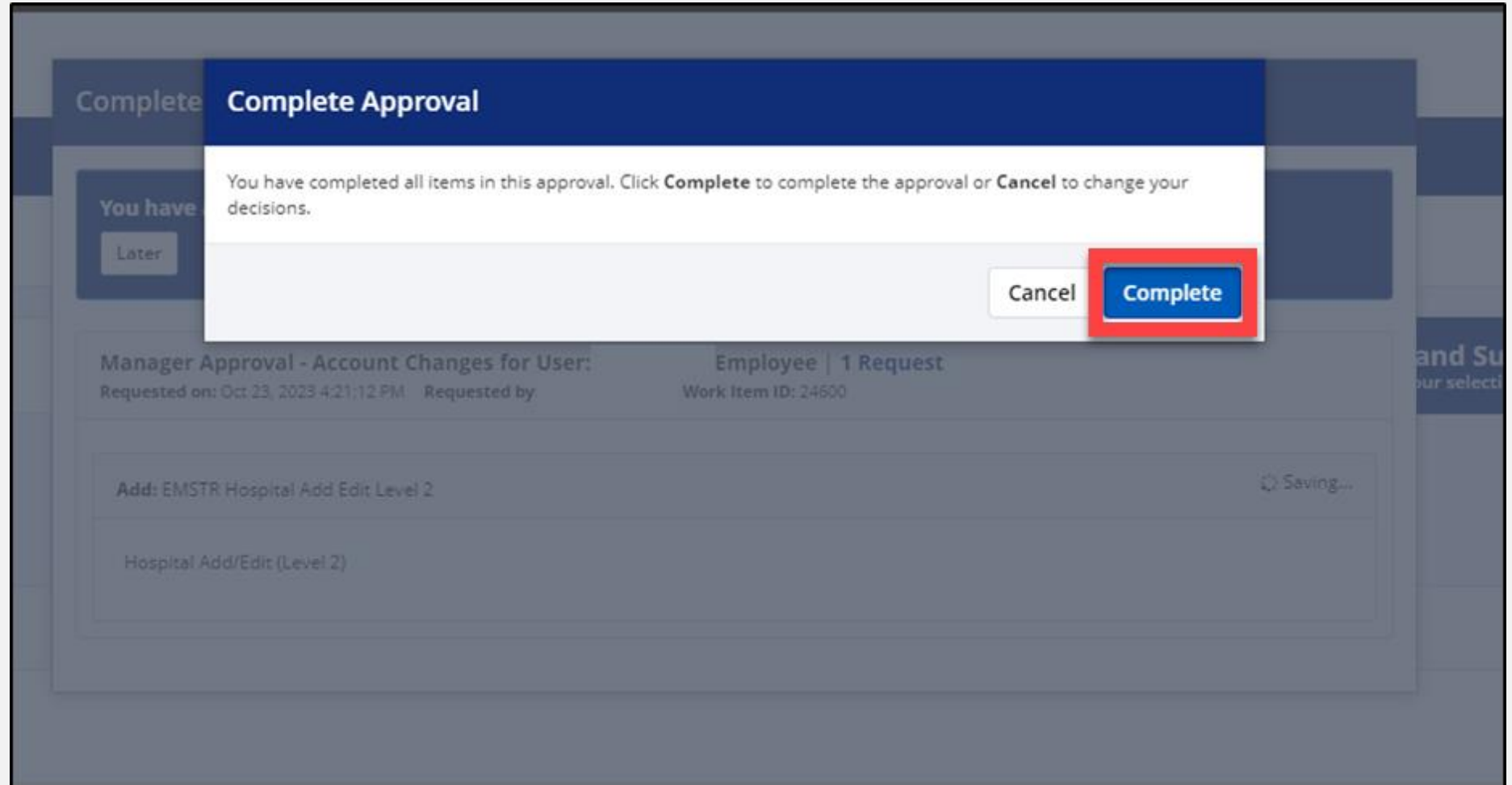
Approval Success

The system will redirect you to the **MyApps** dashboard where you will see **"Approval submitted successfully"** and the user account in the **"Direct Reports"** section.
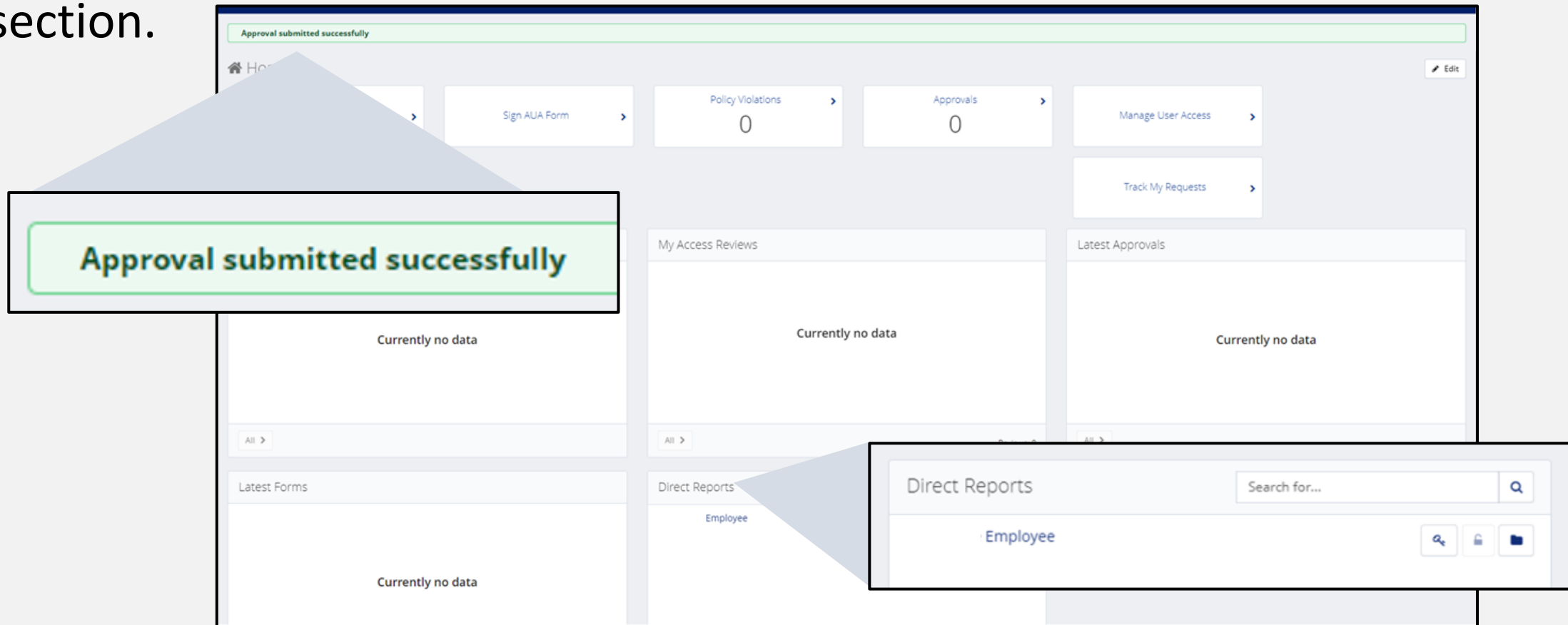
Finish the Approval Process

- The user now needs DSHS data steward and data owner approval.

- Only after all three approvals are complete will the user be able to access the **EMSTR** tile on their **MyApps** dashboard.

- The system will send the user an email notification indicating the access request was approved.

Approve or Deny User's EMSTR Access Request

To approve or deny your user's access request, click the **"Manage User Access"** tile.

- Select the **"Home"** button at the top left of the webpage.
- After selecting **Home**, you will see the **Approvals** tile.

Select the **"Approvals"** tile to navigate to your approval queue.

On the **Approvals** page, you can **"Approve"** or **"Deny"** the request.

Click the **"comment bubble"** to review the business justification and determine if you want to approve the request.

Below is an example of when you click the **comment bubble** and see the business justification to determine if the request should be approved.

Once you approve the request, leave a comment for tracking purposes. This step is required.

After leaving a comment, select the **"Post"** button to save the comment.

To add another comment before approving or denying the request, click the **"comment bubble"** button.

To approve the request, select the **"Approve"** button.

To deny the request, select the **"Deny"** button.

After selecting **Approve** or **Deny**, a **Complete Approval** box will appear.
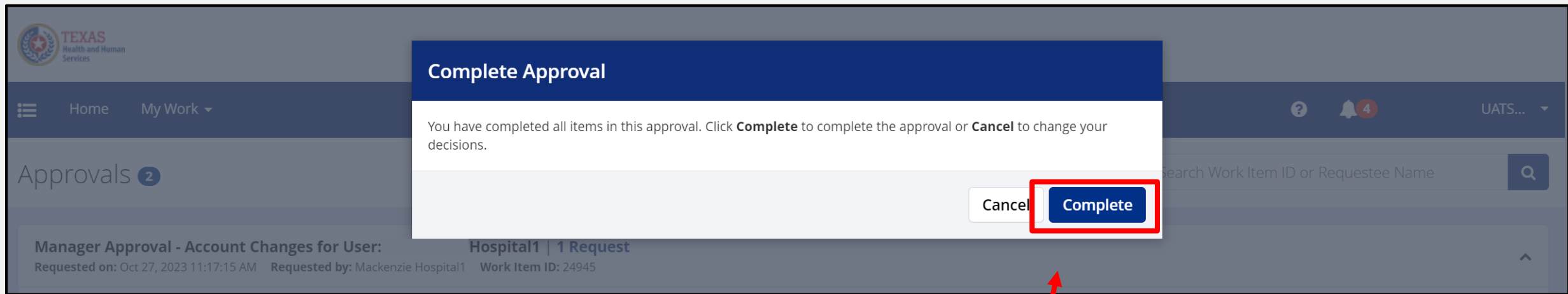
Select the **"Complete"** button to submit the request.

Select the **"Cancel"** button to delete the request.

Approve or Deny User's Request (13 of 13)

- Once you complete the review process, the system will send the user an email to notify them the access request was approved or denied by their facility administrator.

- The user now needs DSHS data steward and data owner approval.

- After all approval levels are complete, the user will see the **EMSTR** tile on their **MyApps** dashboard.
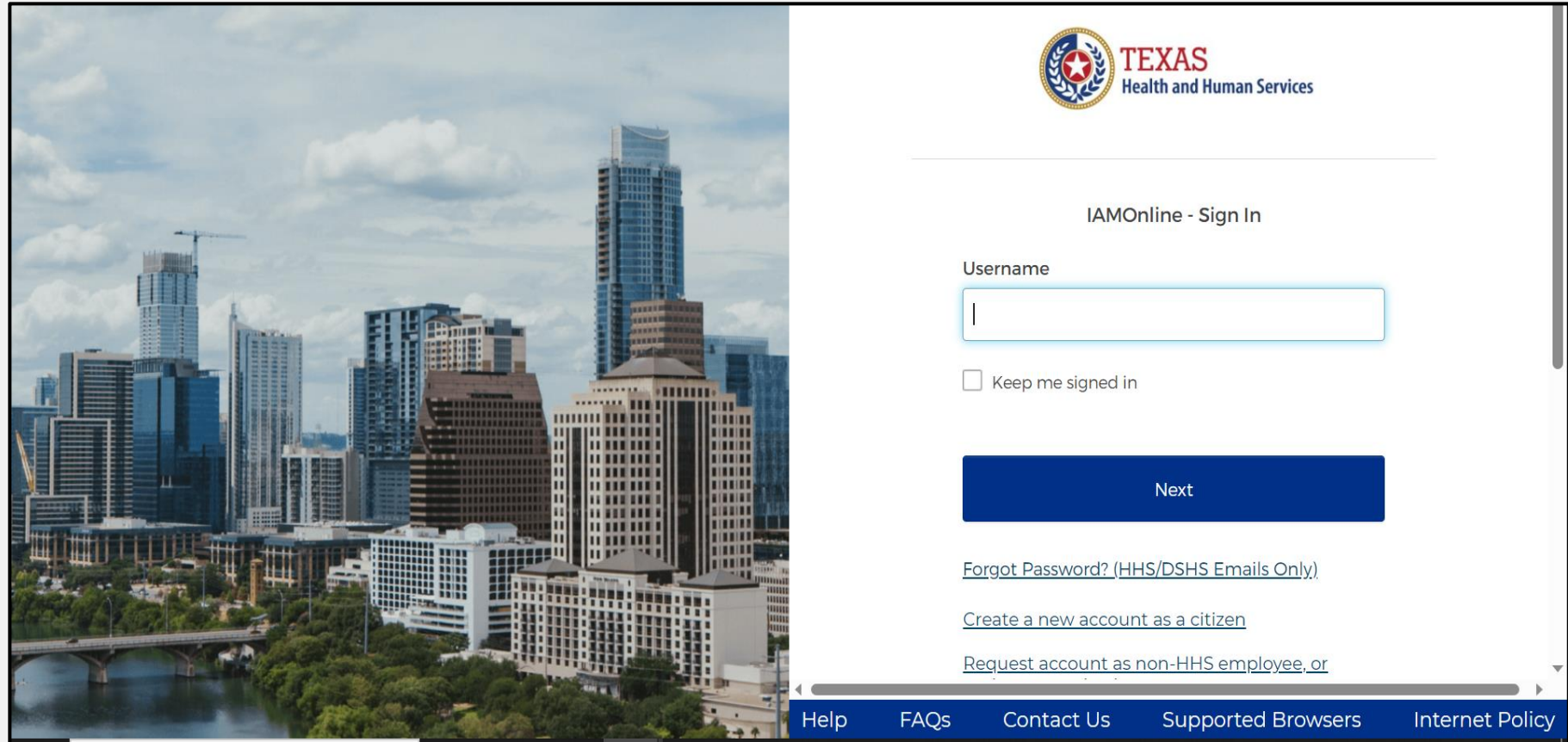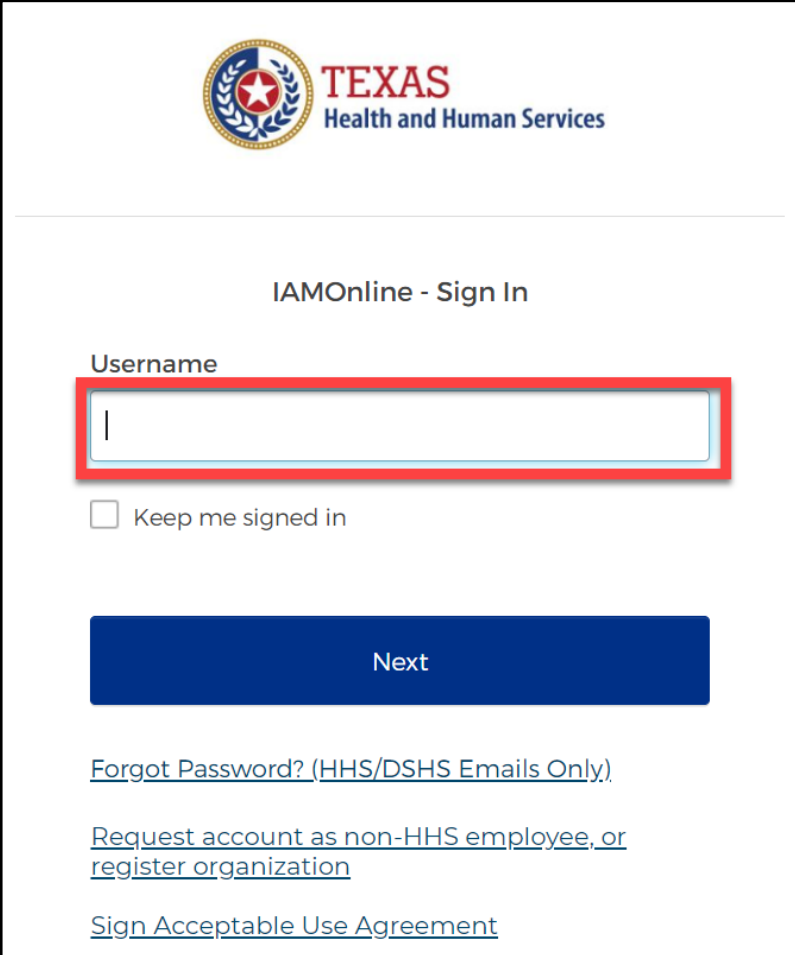
IAMOnline Home Page

Account management is available through the Identity and Access Management Online platform (**IAMOnline**).

- If you forget your password, you can reset it on your own.

- From the **IAMOnline** sign-in page, type your user name in the **"Username"** box.

Click the **"Forgot password?"** link.

- Choose the **"Email"** or **"Phone"** method.

- Click the **"Select"** button.

- After selecting either phone or email, you will be prompted to **Receive a code via** SMS or Email.

  NOTE – The phone option was selected in this example.

- Select **"Receive a code via SMS"** to receive a verification code via text.

Step 1 – Once you receive your verification code, enter it in the **"Enter Code"** box.

Step 2 – Select the **"Verify"** button.

After you enter your verification code, the system will redirect you to the **Reset your IAMOnline Password** Page.

Step 1 – Enter your new password in the **"New password"** box.

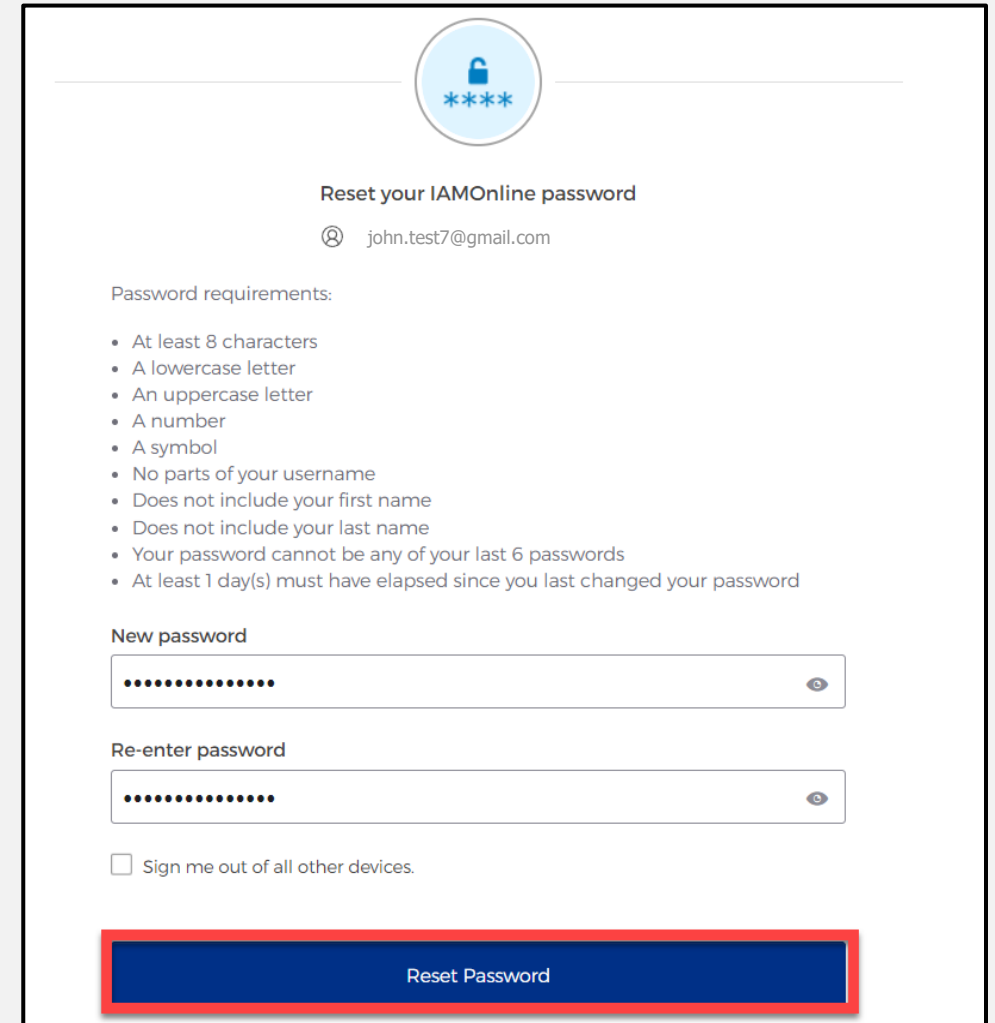Step 2 – Re-enter your password in the **"Re-enter password"** box.

Once you create a new password and re-enter your password, select the **"Reset Password"** button.

Reset Password Complete

After resetting your password, you are logged in and the system will redirect you to your **MyApps** dashboard.
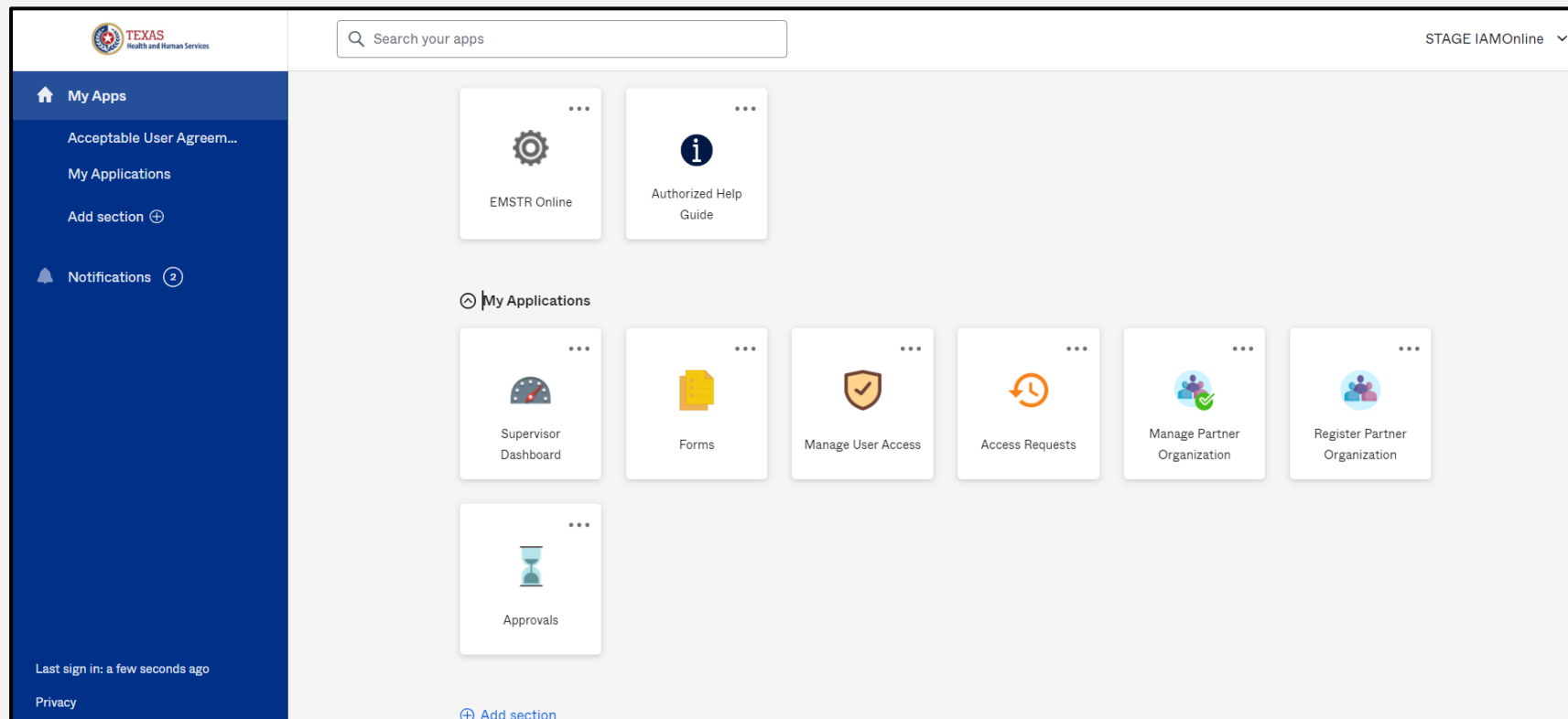
Account Locked

After multiple incorrect password attempts, your account will be locked. You will receive an email notifying you that your account will automatically unlock after 30 minutes.

If you do not remember your password after the account unlocks, please reset your password.

- On the right side of your **IAMOnline** dashboard, click the arrow to display the menu.
- Select the **"Settings"** link.

- Click the **"Edit"** button in the **Personal Information** section.

- You can update your personal information such as:
  - Add a phone number;
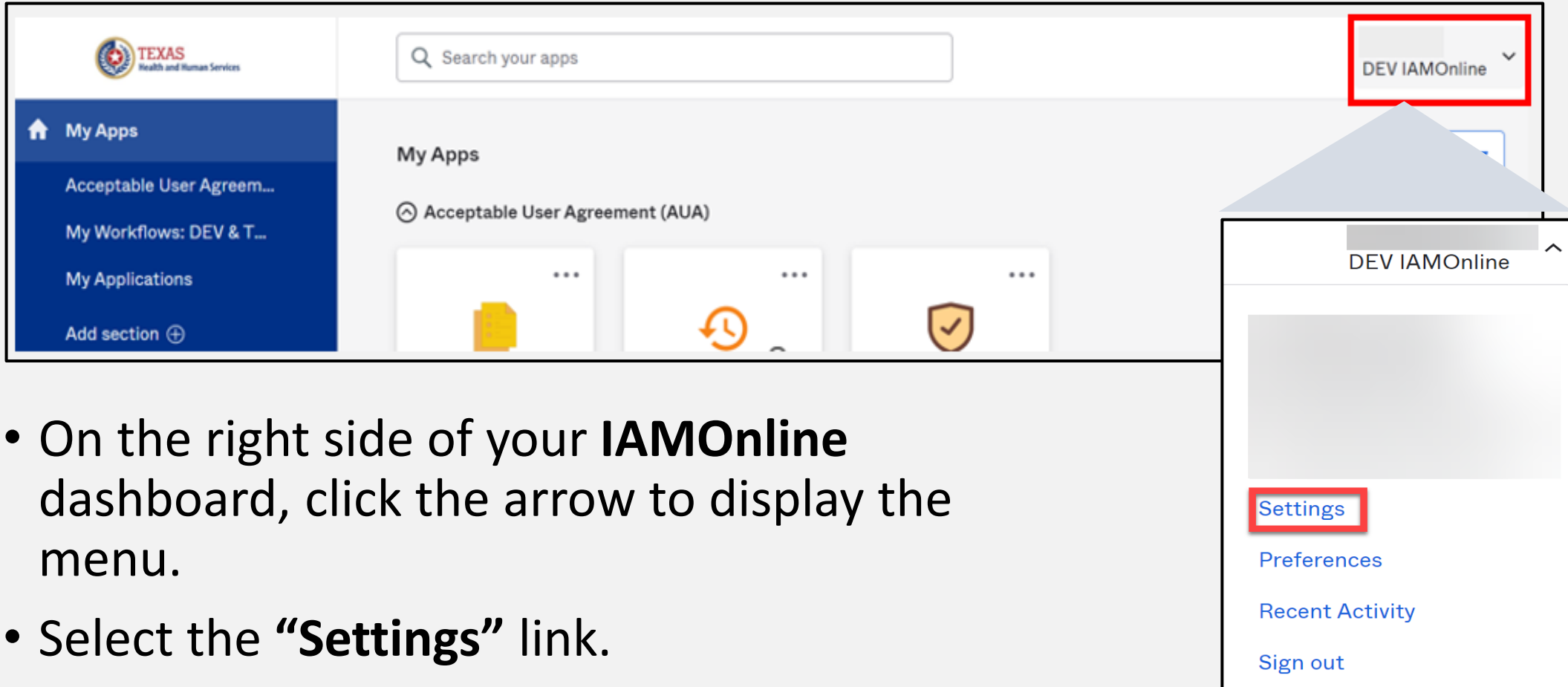 - Add details; and
  - Adjust security methods including password and security questions.

Account

👤 Personal Information | Edit

Edit
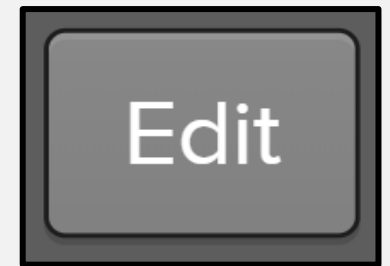
Resources and Contact Information

Authorized Help Guide

From your **MyApps** dashboard, select the **"Authorized Help Guide"** tile to access **IAMOnline** links to helpful videos and additional resources.
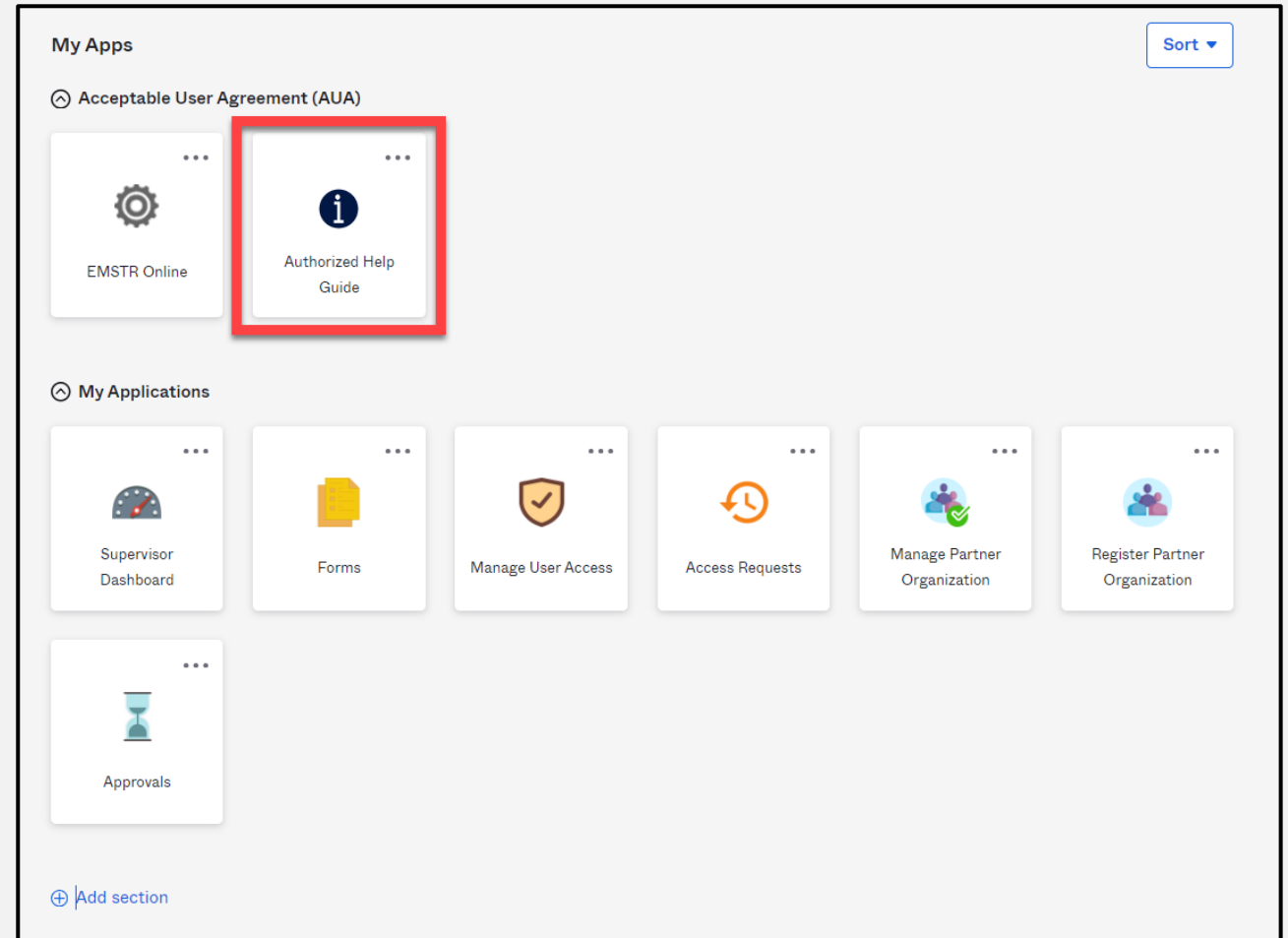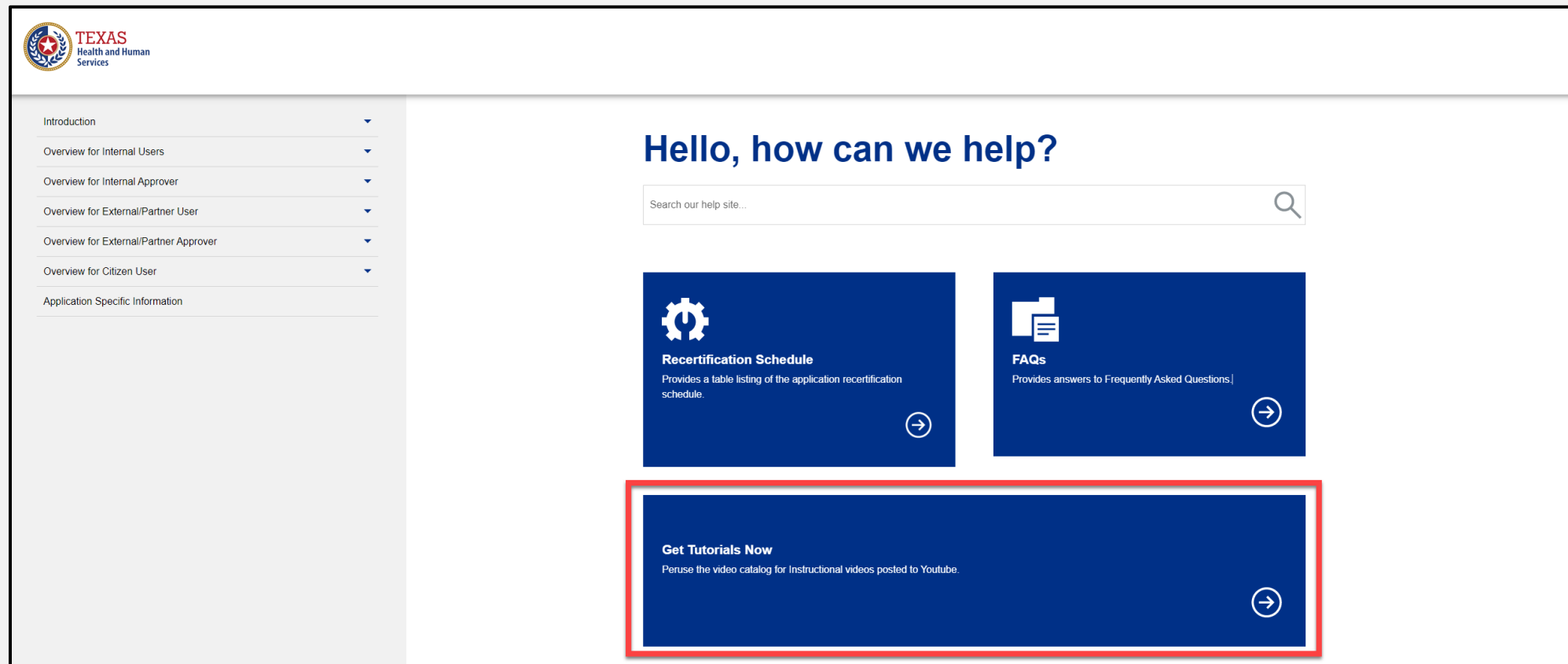
Help Page

To access the **IAMOnline** video tutorials, select the **"Get Tutorials Now"** tile.

Video Tutorials

Select the appropriate link to find specific video tutorials for your user type.

Video Tutorials

This page provides links to video tutorials hosted on Youtube. Select your user type to get started:
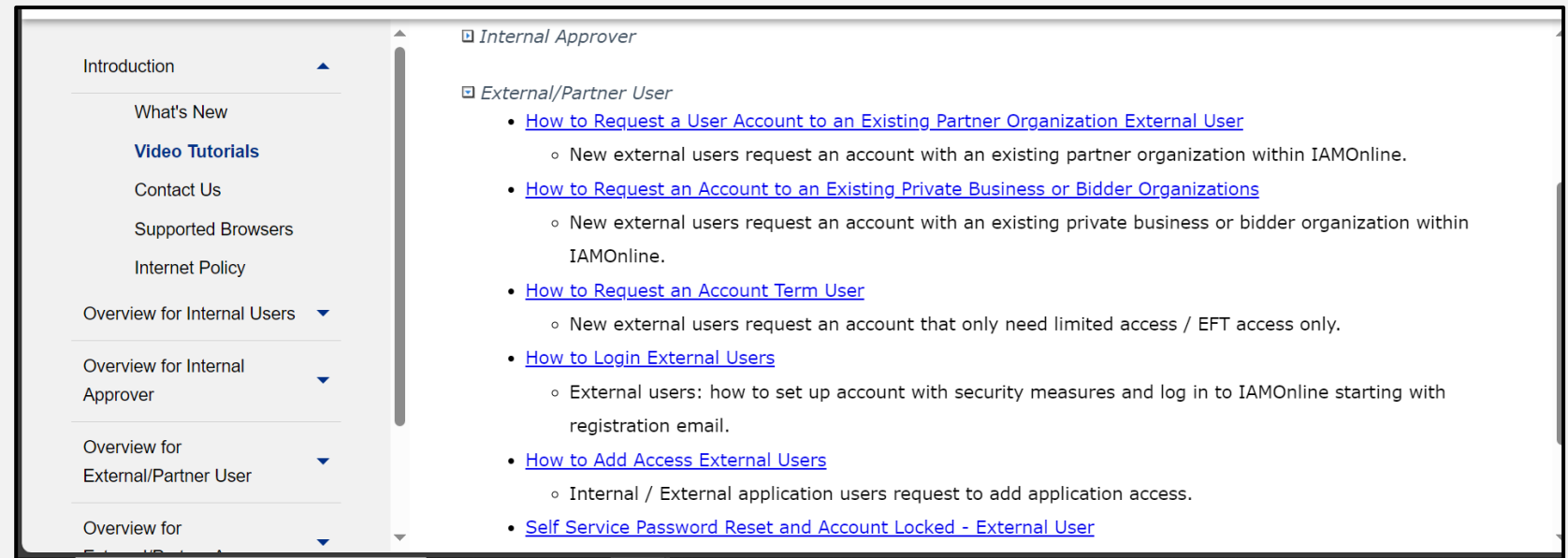
▶ *Internal User*

▶ *Internal Approver*

▶ *External/Partner User*

▶ *External/Partner Approver*   Facility Administrator

External/Partner User Video Links

After selecting the user type, find the video you are looking for and select the link.

Additional Resources and Contacts

Resources – For additional resources, visit the DSHS page [EMS and Trauma Registries](#).

Contact Information – For EMSTR questions, including account access, please contact injury.web@dshs.texas.gov .