HHS ENTERPRISE PORTAL

Features for State Supervisors

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

The portal provides tools designed specifically to help Supervisors manage their staff's access to the portal and the applications they access through the portal.

These actions include:

→ Reviewing staff's portal profile information
→ Reviewing staff's access
→ Suspending/restoring application access
→ Suspending portal access for contractors
→ Certifying staff's access
→ Reviewing and performing actions against staff member's access requests
→ Requesting new or modified application access on behalf of a staff member
→ Delegating their portal tasks to a staff member

Questions? Comments? Suggestions? Please contact us at identitymanagement@hhsc.state.tx.us. You may also find additional help on the HHS Enterprise Portal Web Help.

Table of Contents

Home Screen

When you first sign into the portal, you will be directed to your **Home** screen. Here are a few actions you can perform on this screen.

Figure 1 Home screen

Review Notifications

Broadcast notifications (1) provide important information about the portal.

To view notifications specific to you, click **Notifications** under Access Management on the Main Menu. (2) These notifications will alert you when an update has been performed on a request that you are following, a certification review is due for your staff member, or a staff's access request is waiting for review.

To view more details or perform an action, select the hyperlinks inside the notification.

View Delegate Calendar/Manage Delegates

Select the **Delegate** link at the top right of the screen (3). You may also access the delegate screens by selecting **Manage Staff** under the Staff Management tab on the Main Menu. To learn more about delegation, see Assigning Delegates on p. 15.

View Orders

Select the **My Orders** link at the top right of the screen (4). To learn more about reviewing orders, see Review Your Orders and Requests on p. 13.

View and Manage Staff Access

On the Main Menu, select **Manage Staff** under the Staff Management tab on the Main Menu (5). This action opens the **My Staff** screen (Figure 2 My Staff screen).
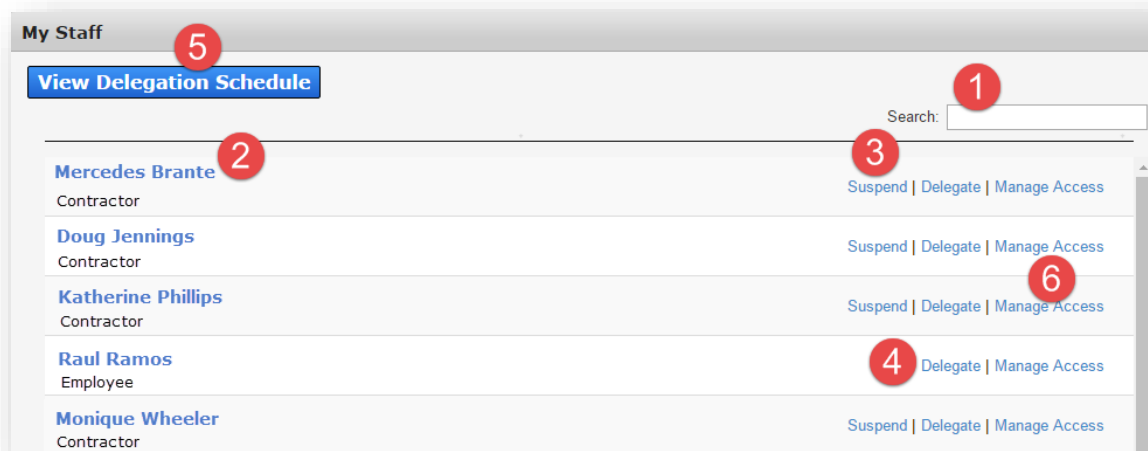
My Staff Screen

Figure 2 My Staff screen

Search for a Specific User

Enter their name in the search field (1).

View Staff's Portal Profile Information

Select the staff member's name (2).

Suspend a Contractor's Portal Account and Access to All Integrated Applications

Select the **Suspend** link in the contractor's row (3). Note: Portal account suspension for state employees must be done through CAPPS.

Designate Staff Member as a Delegate

Select the **Delegate** link in that user's row (4).

View the Delegation Schedule

Select the **View Delegation Schedule** button at the top of the screen (5). To learn more about managing delegates, see Assigning Delegates on p. 15.

View and Manage Staff Access

Select the **Manage Access** link in the staff member's row (6). This will take you to the **User Summary** screen (Figure 3 User Summary screen 1-4).

User Summary Screen

Figure 3 User Summary screen 1-4

View List of Applications and Their Statuses

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

→ Last day the access was updated
→ Your staff member's username for the application
→ Last day the access was reviewed
→ The user's accesses status for that application

View Access Details

Select the item name (2).

View List of Agreements

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

Review Agreement Content

Select the hyperlinked name of the agreement. You can also download or print the agreement after it has opened (4).

Figure 4 User Summary screen 5-9

Suspend User's Access

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

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

Note: Applications with a suspended status will have the **Restore** option available.

Certify User Access for a Specific Application

Select **Certify** in the application's row (6).

Certify All Access At Once

Select **Certify All** at the top of the screen (7).

> **Why should I certify user access and when should I do it?** See Certifying Access: What It Is and Why It's Important on p. 15 for more information.

Modify User Access for a Specific Application

Select **Modify** in the application's row (8). This action opens the **Review Orders** screen (8). See Figure 7 Review Order - Information Required on p. 11 to learn more about this screen.

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

Select **Add/Modify Access** at the top of the screen. This action opens the **Select Items** screen (9). See Figure 6 Select Items screen on p. 10 to learn more about this screen.
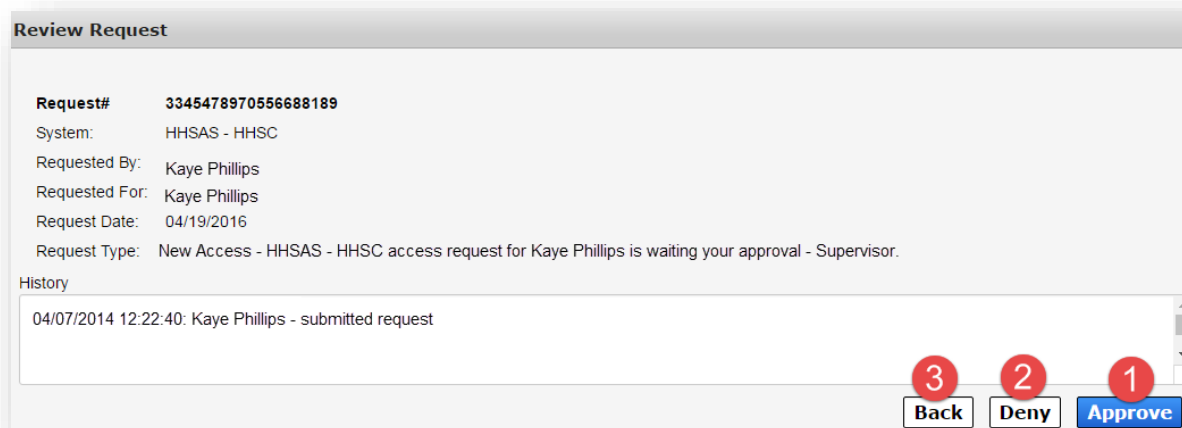
Review a Staff Member's Access Request

A notification appears on your **Home** screen when a staff member submits an access request. Select **Review Request** inside the notification to open the request details.

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

→ Request Number
→ Name of Application
→ Requester
→ Recipient of the access request
→ Request Date
→ Request Type
→ History of actions performed against the request

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

Review Request

Request#	3345478970556688189
System:	HHSAS - HHSC
Requested By:	Kaye Phillips
Requested For:	Kaye Phillips
Request Date:	04/19/2016
Request Type:	New Access - HHSAS - HHSC access request for Kaye Phillips is waiting your approval - Supervisor.

History

04/07/2014 12:22:40: Kaye Phillips - submitted request

③ Back   ② Deny   ① Approve

Figure 5 Review Request screen

Approve Access Request

Select **Approve** to approve the request (1).

NOTE: Some requests will allow you to edit the selections before approving.

The **Add Details** window will open. Entering details is not required if you are approving the request. Select **OK** to complete the approval.

Deny Access Request

Select **Deny** to deny the request (2). This will prompt the **Add Details** window to open. Details are required if you are denying the request. Select **OK** to finalize the action.

If you're not ready to commit…

Select **Back** to exit the request without performing an action (3).

You have 10 days to perform an action on a request. If you do not act on the request within 10 days, the system will cancel the request and the requester will have to submit the request again.

Request New or Modified Access for a Staff Member

On the **Select Items** screen, items for which the staff member currently has access will be listed at the top in highlighted rows (1). Select these items if you would like to modify their existing access. If needed, use the horizontal scrollbar to view the staff member's username for a specific application. You should also select items in these rows if you want to restore or suspend access for this item.

Items in non-highlighted rows represent new access (2). Select these items if you want to request new access for your staff member.

Figure 6 Select Items screen

Enter text in the **Search** field to find a specific application (3). You may also take advantage of the filter options to narrow your results (4).

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

On the **Review Items** screen, items that require additional information will have links under **Status** in their row. Select each of these links to provide the necessary information (1). The process for providing this information differs from app to app.
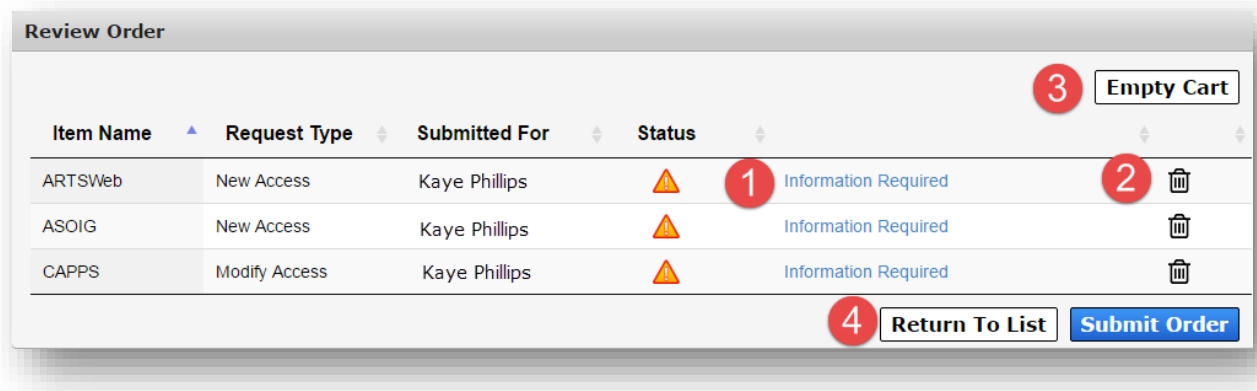

Figure 7 Review Order - Information Required screen

Other actions:

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

After you have entered the required information for all items in your cart, a confirmation message will appear. Read and click the box beside the message to agree to its terms (5). Select **Submit Order** to finalize the request (6).
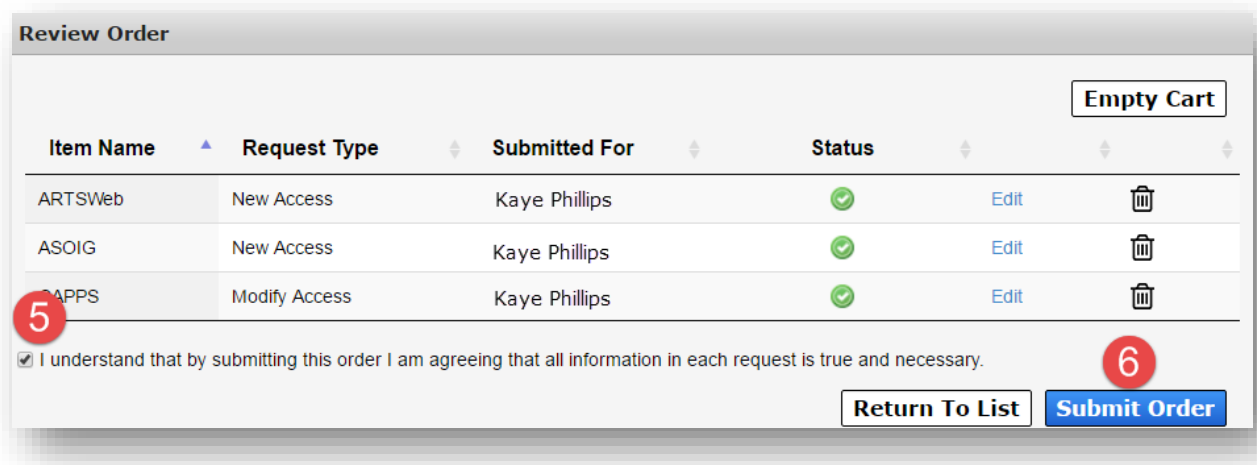

Figure 8 Review Order - Confirmation screen

You will receive an update via portal notification and email within 10 days of submitting the order. You may also review updates at any time by selecting the **My Orders** link at the top right of the screen. See Review Your Orders and Requests on p. 13 to learn more this feature.

Review Your Orders and Requests

When an update has been made to your order, you will be informed via email and portal notifications. You may also check the status of your order and requests by selecting the **My Orders** link at the top right of any portal screen.

Figure 9 Home - My Orders screen

> ### How is an Order Different than a Request?
>
> An **order** defines the collection of items that you have requested access for in one submission, and is given its own order number. Each item in that order is a **request**, and thereby is given an individual request number.

1. On the **My Orders** screen:
    a. Orders that you created within the last six months are displayed, starting with the most recent.
    b. You can rearrange the list from oldest to most recent by selecting the arrows beside **Order Number** or **Submitted Date**. If the status is **In Progress**, you also have the option to cancel the order.
    c. Select the **Order Number** to open details about a specific order.

Figure 10 List of Orders screen

2. On the **Order Details** screen:
    a. Order details include the request number, item name, request type, who the request was submitted for, the status, and actions taken against the request.
    b. Select the **Request Number** in the row of a request to view more information.

Figure 11 Order Details screen

3. On the **Request Detail** screen:
    a. Request details include the history, received/completed date, who the request was completed by, and its status.
    b. Select **View Details** in the row of an activity to learn more information on that specific activity.

Certifying Access: What It Is and Why It's Important

The Certification process is a unique feature on the portal designed specifically for Supervisors.

In order to ensure your staff members' access is current, you are required to review their access on an annual basis, within 30 days of the anniversary of an employee's hire date. If you do not perform an action on your staff member's access within 30 days after the anniversary of their hiring date, the portal will alert your Supervisor by email and post a notification on their Home page.

> You are also required to recertify access for employees whose position number, for whatever reason, has changed.

When a staff member's access is up for review, you will receive an email reminder and a notification on the **Home** screen of the portal. Click on the **Review** link within the notification to access the **User Summary** screen, where you can review and certify their access.

> Staff members may require certification to applications that are not listed on their **User Summary** screen. Only applications that have been implemented into the portal are available for review and certification.

If the review request has expired and the notification is no longer available on your **Home** screen, you can still review your staff member's access by selecting **Manage Staff** under the Staff Management tab on the Main Menu. Once you are on the **My Staff** screen, select **Manage Access** in the row of the staff member whose access you wish to view. This action opens their **User Summary** screen. See User Summary Screen on p. 15 for more details about the actions you can perform on this screen.

Assigning Delegates: The How's and Why's

The HHS Enterprise Portal allows you to delegate tasks to your staff members, but what does that really mean?

As a Supervisor, you probably receive a multitude of access requests through the portal, all which require attention within a designated period. When you do not perform actions on these requests, the request is cancelled, and the requestor must request the access again, which can be time-consuming (not to mention, make you unpopular among your team).

The portal's delegation feature helps you circumvent that problem by allowing you to delegate a staff member to perform your tasks during periods when you are unavailable.

Before you assign a delegate, however, keep in mind these basic guidelines:

→ Assigning a delegate means all requests customarily sent to you will instead be forwarded to the delegate during a defined time frame.

→ Requests submitted before the start date/time do not transfer to the delegate.
→ Requests forwarded to the delegate during the delegation period will remain assigned to the delegate until the requests are completed, rejected, or expired.

→ Delegates can only approve or deny requests; they cannot initiate requests on your behalf.
→ As the delegator, you are responsible for approvals made by the delegate.

Furthermore, the delegation periods last up to 180 days. To extend the date passed the 180-day mark, change the end date after the delegation period has started.

On the Delegation Screen

Figure 12 Delegation Schedule screen

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

View Previous Delegation Assignments

Select **Show All** (2).

Cancel a Delegation Assignment

Select **Cancel** under Actions in the row of the assignment that you wish to cancel (3).

Be sure you want to absolutely, positively cancel the assignment before you select the Cancel option. You cannot undo this action.

Edit a Delegation Assignment

Select **Edit** under Actions in the row of the assignment that you wish to edit (4). This action opens the **Delegation Details** screen (Figure 14 Define Delegate Details), where you can make adjustments.

Create a New Delegation Assignment

1. Select the **New Delegation** button (5). This actions opens the **Delegate Search** screen.

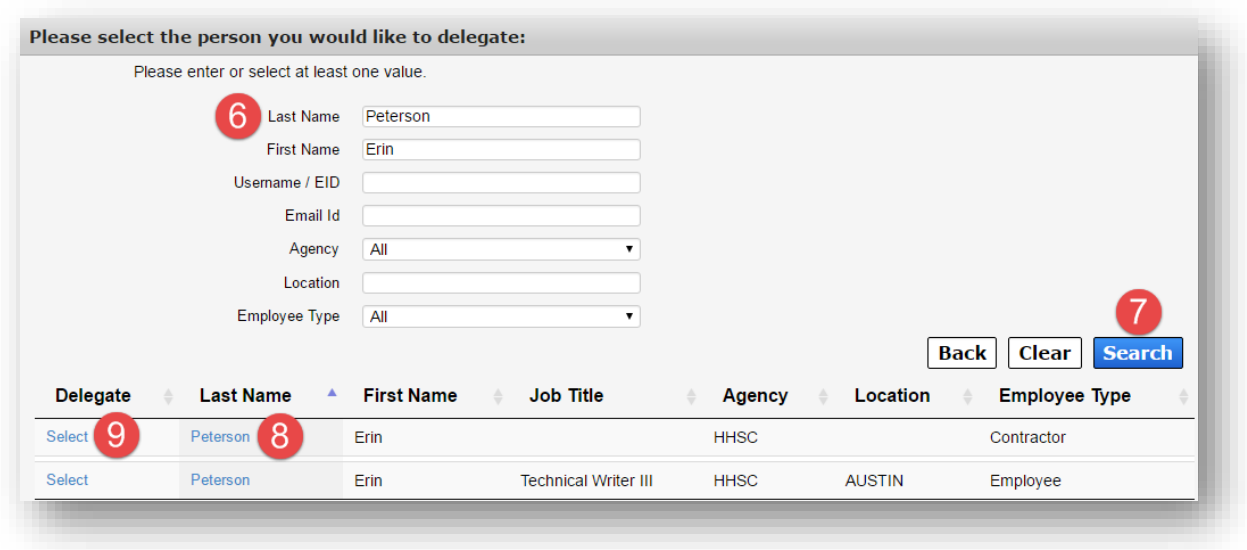*Figure 13 Delegate Search screen*

2. Add search criteria in the fields provided (6).
3. Select **Search** when you are ready (7).
4. A list of search results will appear. Select the delegate's last name to view their information, confirming you have found the correct delegate (8).
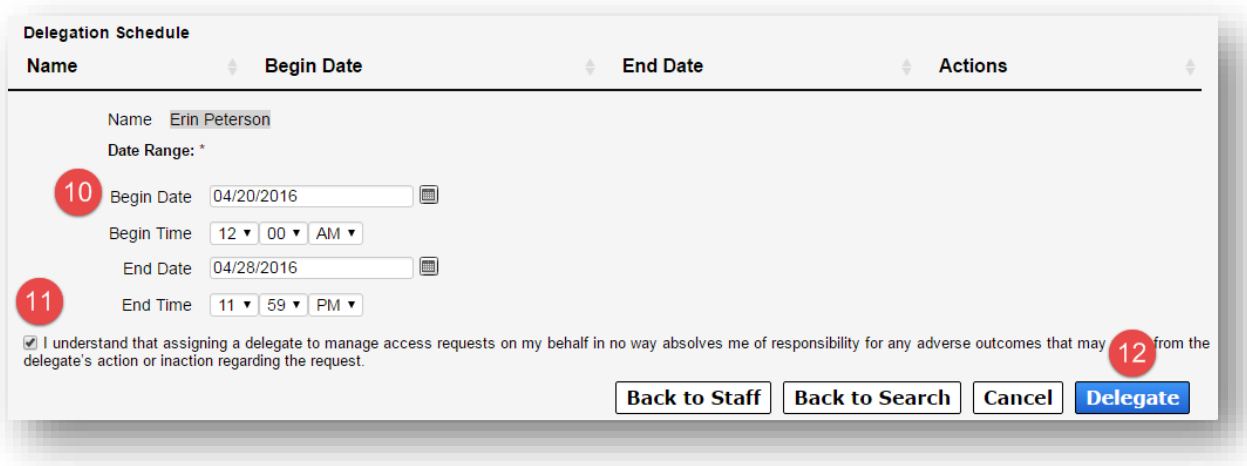5. Click **Select** in their row to begin the delegation assignment process (9).

Figure 14 Define Delegate Details screen

6. Add the start/end dates and times in the fields provided (10).

7. Review the agreement and check beside it to agree to its terms (11). The **Delegate** button will not appear and you will not be able to submit the form until this item has been checked (12).
8. Select **Delegate** to finalize the assignment (12).

Index