

HTNYS Board Member Portal Access Instructions

HANY member hospitals/health systems should update their board members' names and contact information on our online portal, Okta, throughout the year as necessary.

New to Okta? Email Wendy Preedom at wpreedom@hanys.org to request a new account. Then, follow the instructions below, beginning with Step 1.

Already have an Okta account? Simply log in to <https://quality.askflorence.org/HTNYSTrustees> and skip to Step 3 below.

STEP 1: Activate Your Okta Account

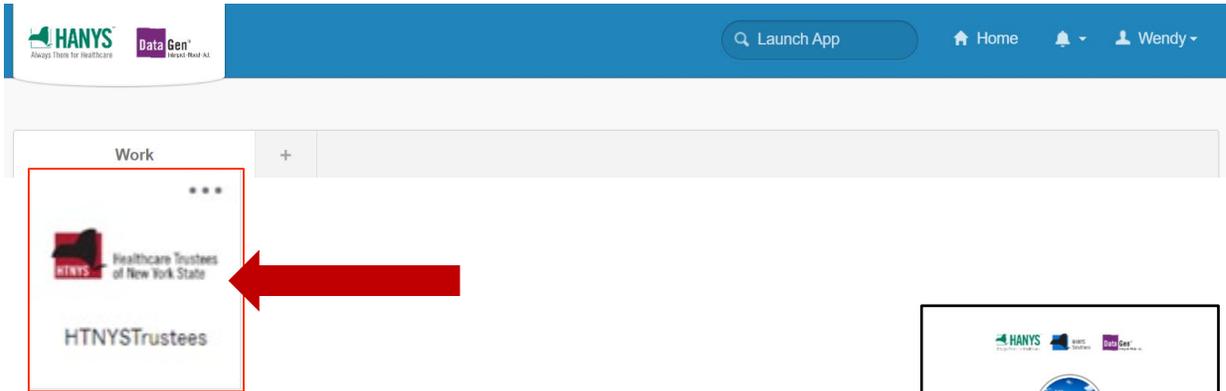
You will receive an email from noreply@okta.com requesting that you activate your Okta account, using multi-factor authentication, that will have to be completed within seven days of receipt. You may have to check your spam or junk folder for this email. Follow the prompts to set it up, making note of your password.

<p>From: Okta [mailto:noreply@okta.com] Sent: Monday, March 1, 2021 3:35 PM To: [REDACTED] Subject: Welcome!</p>	<p>Create your "Okta" account by clicking on the green "Activate Okta Account" button in the email and it will ask you to answer a couple of quick security questions.</p>
<p>Welcome!</p> <p>Hi [REDACTED]</p> <p>HANY and its analytic subsidiary DataGen have implemented a new login process so that you can access our data and analytic services safely and securely. We've created a user account for you. You can activate it by clicking the link below:</p> <p> Activate Okta Account</p> <p>This link expires in 7 days.</p>	

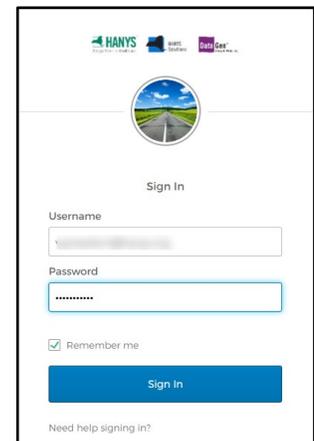
Your username is [REDACTED]
Your organization's sign-in page is "<https://hanys.oktapreview.com>"

STEP 2: Log in to Okta

Once you have activated your account, you will be automatically directed to the Application screen. Click on the icon in red below:

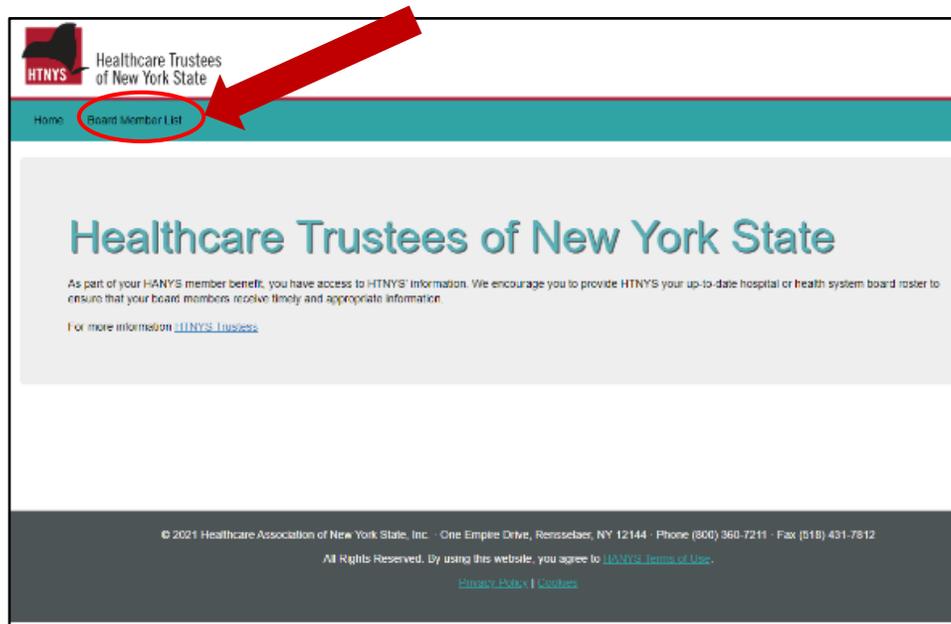


- **After** you have successfully activated your Okta account, it will take you to a login screen. Your username is the prefix of your email address; not your entire email address. For example: your username is jdoe, not jdoe@xxxx.com
- You may access the portal anytime at <https://quality.askflorence.org/HTNYSTrustees>
- Please update this information throughout the year as necessary.



STEP 3: Access Your Facility's Board Portal

After logging in you will be directed to our portal website. Click "Board Member List."



STEP 4: Update Your Facility's Board Member Names and Contact Information

Here you can update your facility's board member's names and contact information:

The screenshot shows the HTNYS (Healthcare Trustees of New York State) interface. At the top right, it says "Hello, Kristin Phillips" and "Log off". The main navigation bar includes "Home" and "Board Member List". Below this is a "Hospital Name" dropdown menu currently set to "All". A red arrow points to this dropdown with a callout box that reads: "Your hospital(s) will be listed here in this dropdown menu, by individual facility. Each one will need to be updated if you have more than one in the dropdown." To the right of the dropdown is a "Create New" button. Below the dropdown is a "Show 10 entries" selector. The main content area is a table with columns: "Board Member Name", "Board Title/Role", "Email Address", "Phone", "Edit", and "Delete". A large grey callout box on the left side of the table contains the following text: "The board members who are already in our database will be listed here. **Need to edit existing members' contact information?** Click "Edit" next to their name. (Make sure to click the "Submit" button to save your changes.) **Need to remove someone who is no longer on your board?** Click "Delete" next to their name. **Need to add a new board member?** Click the "Create New" button in the top, right corner. **If no changes are necessary, or when your changes are complete,** click the "Mark all records as reviewed" button.

ADDITIONAL INFORMATION

If you forgot your password, please follow these instructions:

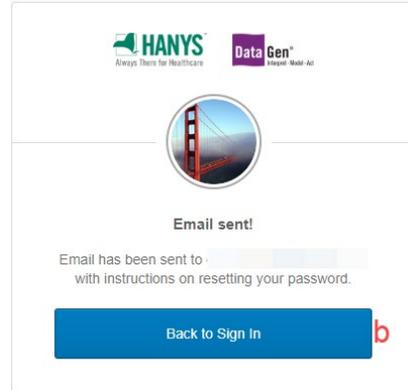
Password reset

On the login page there is small print under the "Sign In" button that reads "Need help signing in?" Select this link and a few options will accordion out from underneath it, "Forgot Password" and "Help."

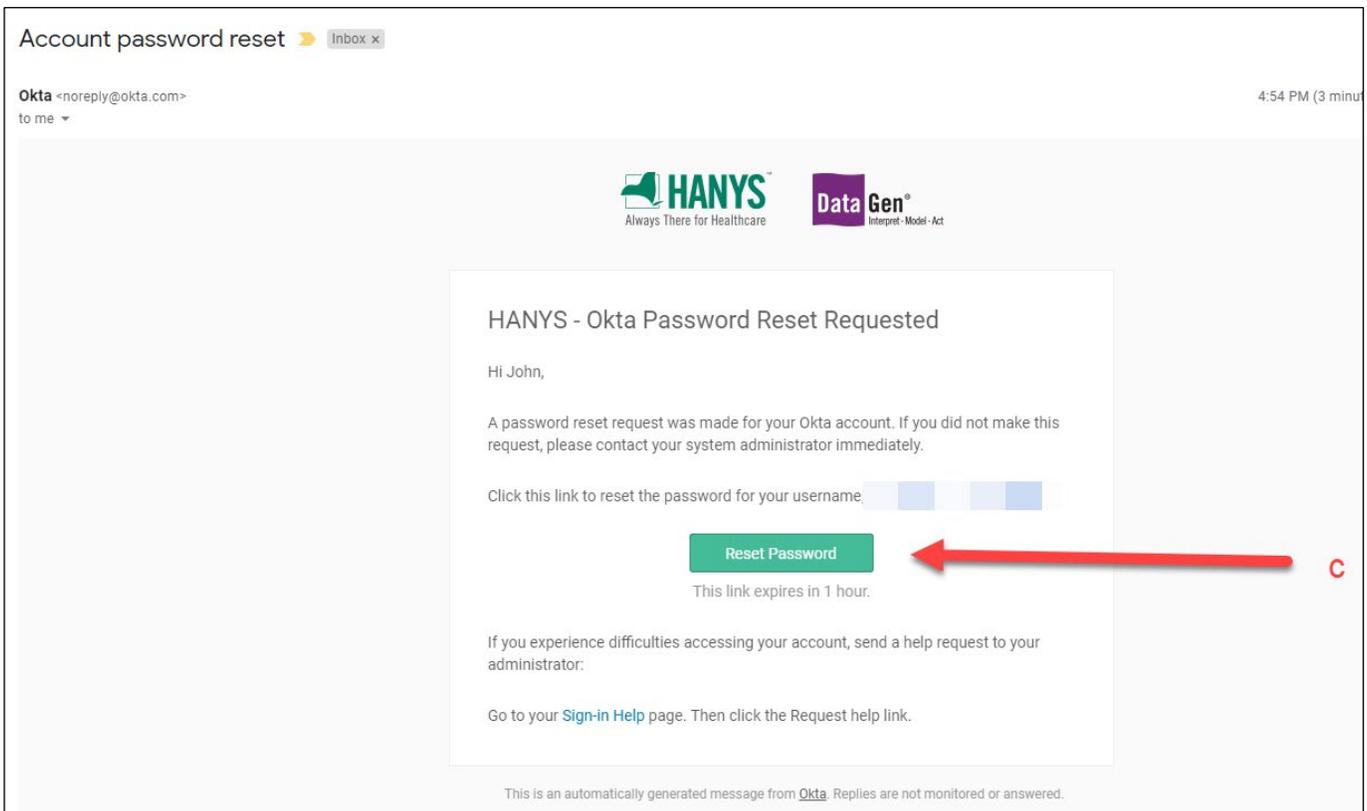
Select the "Forgot Password" option and it will ask you for your email/username" (a), both of which are the organizational email you were set up under. Then select "Reset Via Email."

The diagram illustrates the process of password reset. It starts with a "Sign In" form containing fields for "Username" and "Password", a "Remember me" checkbox, and a "Sign In" button. A red arrow points from the "Sign In" button to a "Reset Password" form. The "Reset Password" form has a field for "Email or Username" with a red letter 'a' next to it. Below this field is a note: "SMS can only be used if a mobile phone number has been configured." There are two blue buttons: "Reset via SMS" and "Reset via Email". At the bottom of the form are links for "Back to sign in" and "Can't access email".

Next, a “Back to Sign In” page will appear (b). An email with a password reset link will be sent to your organizational email address linked to your Okta account.



Select the “Reset Password” button (c) and you will be challenged for your password reset question that was chosen during your initial setup.



Once you have answered the question, it will ask you to update your password and verify it. Upon completion, you will be taken to the Okta homepage. This password is now ready for use on the HTNYS portal.

The “Help” link will take you to an Okta frequently asked questions page with a few “how to” blurbs as well.