MT PHL Lab Portal User Access Request Process

Step 1: Authorizing Individual Submits Access Request

1. The Authorizing Individual (lab manager, supervisor, etc) will navigate to the ServiceNow Portal
   a. This can be done using the quick link in the lab portal



   b. Or by going directly to this link:

   [MTPHL Laboratory Portal Access Authorization Request - Citizen](#)

2. If the link takes you to this screen, select "Citizen Login" – *unless you are a state employee, then select "State Login"*, otherwise skip to step 3.


3. *You will be directed to the OKTA sign-in page.   Sign in using your OKTA account credentials (screenshot on the following page). (State employees should be signed in automatically)*
   a. *If you do not have an OKTA account, click the "Sign Up" link at the bottom of the screen. Then come back to this step once you have an OKTA account set up and activated.*

4. After you sign in, you should be directed to the MTPHL Laboratory Portal Access Authorization Request form shown in step 5.

    a. If you are directed to the main ServiceNow landing page instead, which looks like this, follow steps b-c below.
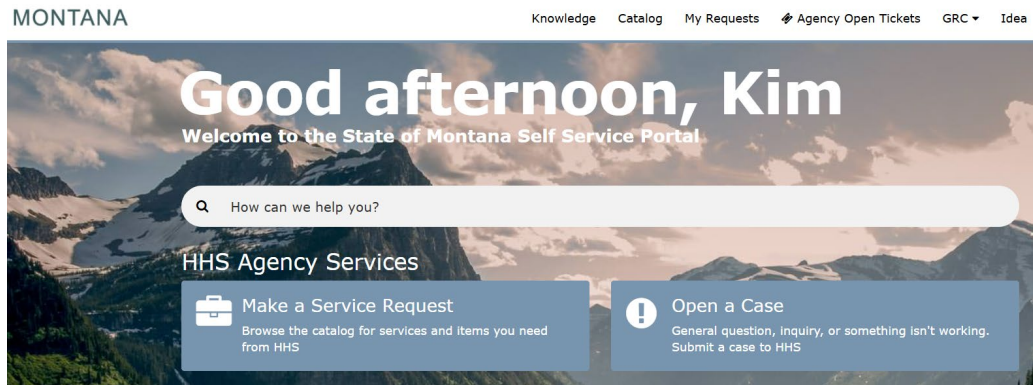
    b. Click on the "Make a Service Request" tile. Then click on "Accounts and Access"
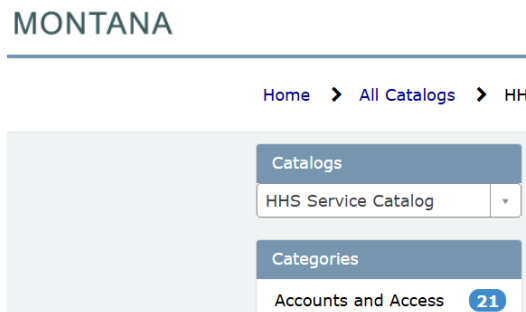
    c. Finally, click on this tile (shown on following page) to take you to the form:

MTPHL Laboratory Portal...
Request Access to MTPHL Lab
Portal

5. Complete the form.

MTPHL Laboratory Portal Access Authorization Request

Request Access to MTPHL Lab Portal

Please fill out this form for individual user accounts for each user in your facility. By signing this form, you are authorizing the individual(s) listed below to use the MTPHL Laboratory Portal on behalf of your facility and certifying that you have the authority to grant this access on behalf of the facility. In addition, you agree to notify MTPHL if any of the individuals cease to work in a capacity that requires access to the system. This system contains information protected from disclosure under privacy and security laws including the Health Insurance Portability and Accountability Act of 1996 (HIPAA), as codified at 42 U.S.C. § 1320d-d8, and the Health Information Technology for Economic and Clinical Health Act (the HITECH Act), as codified at 42 U.S.C. §§ 300jj et seq. and §§ 17901, et seq. and the implementing regulations for the two acts at 45 CFR Parts 160, 162 and 164.. **Each user must also sign a User Attestation form. User accounts will not be activated until this form is received.**

✱ Indicates required

✱ Facility Name

[   ]

Account Number

[   ]

✱ Authorizing Individual

[   ]

✱ Title

[   ]

User 1

✱ User First and Last Name

[   ]

✱ User Email

[   ]

✱ Access Type

[-- None --   ▾]

☐ Add another user

✱ Digital Signature

[   ]

☐ ✱ My name, typed above, is my electronic signature.

When you have finished filling out this form, please press "Submit" on the right side of the screen.

  a. The Account Number field is optional, but it is helpful if there is any confusion over which facility is submitting the request.
  b. Multiple users can be added by clicking the "Add another user" box after each user.

6. Submit the form by clicking the "Submit" button on the right side of the screen.

[💾   Save as Draft   ]

[Submit   ]

a. After submission, you will be taken back to a blank form. Click on your name at the top of the screen and select Logout to logout
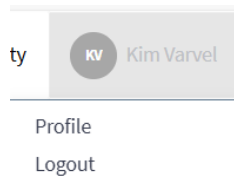
b. You will receive up to two emails confirming your submission, as the system creates the request and the linked case.

## Step 2: Request Approved by LIMS Team

Once your request has been approved, you will receive another email notification. No action is needed on your part. Each user will also receive an email with instructions for completing their confidentiality agreements.

Step 3: User(s) Complete Confidentiality Agreement

1. Each user will receive an email (shown below) directing them to complete a confidentiality agreement.

   Your Lab Portal Access Request has been approved. You will need an OKTA account to proceed. If you do not have one yet, follow these instructions. When you have an account, return to this email and continue. Please use this link to access and complete the Lab Portal Confidentiality Agreement. When asked for the REQ Number, please paste this number exactly: REQ0451143.

2. The user needs an OKTA account before they can access the form. The email contains a link to the instructions for creating an OKTA account. Their OKTA account must be set up using the email given on the Access Authorization form.

3. The email contains a link directly to the form they need to complete. When they click the link they will be directed to sign-in to OKTA.

4. Once the user signs in to OKTA, if they followed the link from the email, they will be sent directly to the Confidentiality agreement shown in step 5.

   c. If the user signs in to OKTA and is directed to the main ServiceNow landing page, they will need to follow the steps b-c below.
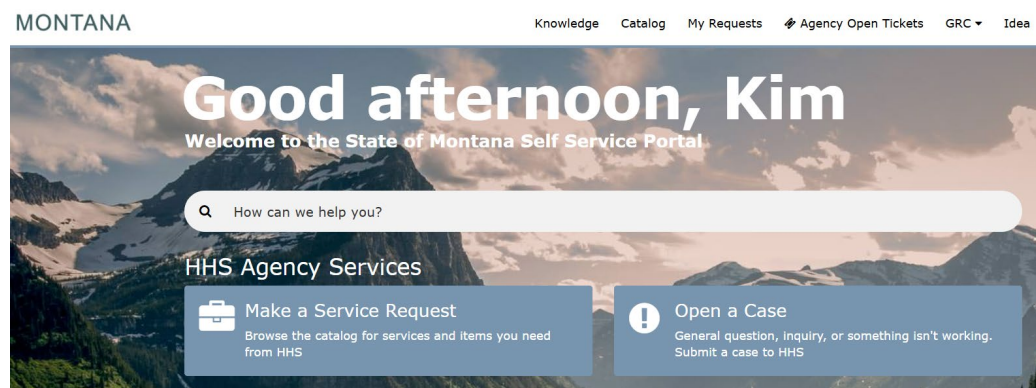
d. Click on the "Make a Service Request" tile. Then click on "Accounts and Access"

MONTANA

Home > All Catalogs > HH

Catalogs

HHS Service Catalog ▾

Categories

Accounts and Access 21

e. Click on this tile (shown on the following page) to navigate to the form:

Vie... MTPHL Laboratory Portal
Confidentiality Agreement

MTPHL Laboratory Portal...
Please fill out the MTPHL
Laboratory Portal Access
Authorization Form first and
wait for an email instructing
you to fill this form out.

5. The user will complete and submit the Confidentiality agreement.
   a. The REQ Number field must be filled in with the number from the email the user received.

MTPHL Laboratory Portal Confidentiality Agreement

Please fill out the MTPHL Laboratory Portal Access Authorization Form first and wait for an email instructing you to fill this form out.

✳ Indicates required

✳ First Name

Kim

✳ Last Name

Varvel

✳ REQ Number: ❓

This number will be provided in an email ✖
to you. Please do not attempt to fill out
this agreement until you have received the
email.

✳ Email Address

KVarvel@mt.gov

✳ Are you a state of Montana employee?

-- None -- ▾

b. The user will receive up to two automated email confirmations of their submission when the system creates the request and linked case.

c. The user will also receive a third email (shown below) letting them know they will be notified when their account is ready for access

Thank you for submitting a Lab Portal Confidentiality Agreement. Your form has been submitted and you will recieve an email with further instructions when your account has been set up.

Step 4: User Account is Created and Linked to OKTA

1. Once the user submits the confidentiality agreement, a request is submitted to State IT to link the user's OKTA account to the lab portal.
2. When the user's OKTA account has been linked to the lab portal, a request is submitted to the LIMS team to create the user's lab portal account.

Step 5: User Receives Access to Lab Portal

1. When the user's lab portal account has been created and linked to OKTA, the user will receive an email with instructions on how to access the lab portal.

For problems with any of the forms in the ServiceNow portal or your OKTA account, please reach out to our IT Department at 406-444-9500