

eCIS Registration User's Guide

Contents

Business Partner eCIS Registration Overview	3
New Commonwealth Account Users	4
eCIS Organization Registration	4
eCIS User Registration	11
Existing Commonwealth Account Users	17
eCIS Organization Registration	17
eCIS User Registration	22
Identity Manager Console	27
Logging In	27
Manage My Profile	27
Business Partner Management	28
Manage Organization	28
Manage Users	28
View eCIS User Agreement	28
Delegated Administrators Only	29
Home Page – Tasks and Work List	29
Business Partner Management	33
Appendix	35

Business Partner eCIS Registration Overview

This Quick Reference Guide is designed to assist you in completing your online self-registration.

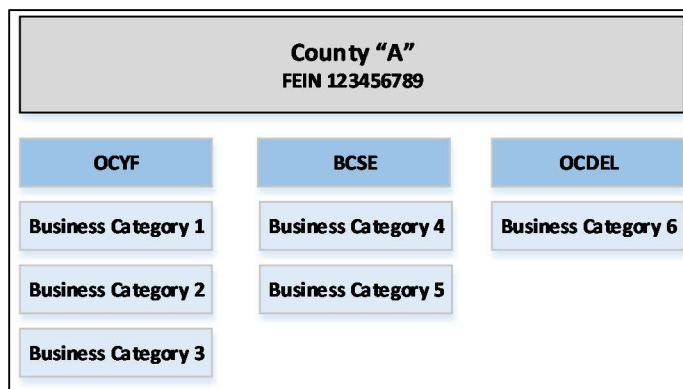
There are three main steps to registering:

1. Register your organization with eCIS.
2. Register at least one, but no more than four, individuals as Delegated Administrators (DA) for each business category relevant to your Commonwealth program affiliation. These individuals will have the responsibility to approve or reject eCIS users within their organization and associated business category.
3. Register eCIS users as appropriate.

Organizations are identified by their Federal Employer Identification Number (FEIN). You will need the FEIN prior to beginning registration.

Business Partner eCIS access is designed specifically for each Commonwealth program and business partner user group. See the appendix at the end of this document for a current list of Commonwealth program areas and affiliated business categories.

An organization may support multiple Commonwealth programs depending on the scope of business conducted. And within a Commonwealth program affiliation, there may be multiple user groups performing different business functions. These business functions are defined as “Business Categories” in the registration process. Below is an illustration of the organization/program office/business category relationship.



To enable the assignment of the appropriate eCIS role, the registration process requires each organization to register for at least one Commonwealth program office affiliation and business category (function). When an organization has multiple Commonwealth program office affiliations and business categories, each must be a separate registration request.

Once the appropriate Commonwealth program office affiliations and business categories have been registered, users will select the option that aligns with the function they perform.

All individuals who require access to eCIS must register, including those with an existing Commonwealth business partner account (b- account).

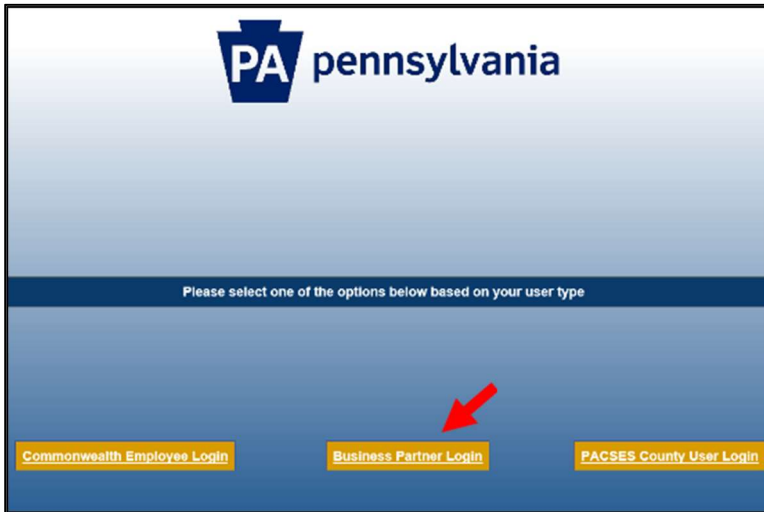
New Commonwealth Account Users

eCIS Organization Registration

In order to register, you will need your organization’s Federal Employer Identification Number (FEIN) and an active work email address.

1. From your internet browser navigate to the eCIS landing page
<https://intraapps.dpw.state.pa.us/mci/>
2. On the eCIS landing page, click **Business Partner Login** (see Figure 1: eCIS Landing page)

Figure 1: eCIS Landing page



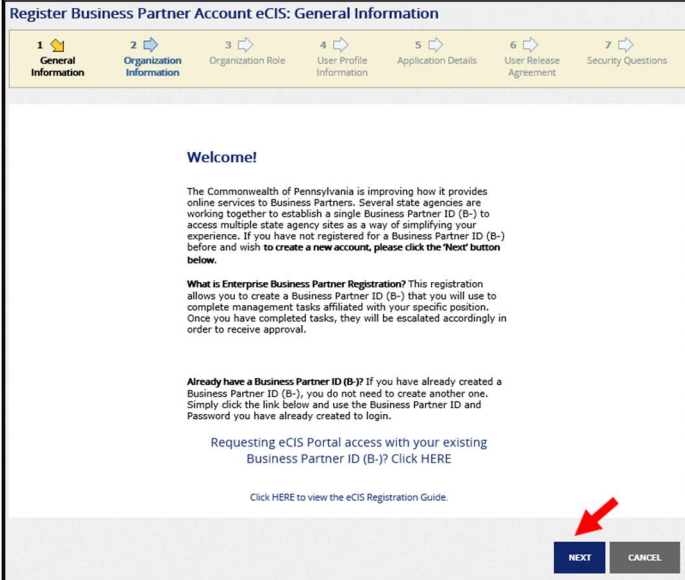
3. On the eCIS Login page, click Register for eCIS (see Figure 2: eCIS Login page)
 - No need to login – just click the link under Self-service for Business Partner

Figure 2: eCIS Login page



4. On the General Information page (see Figure 3: General Information page), click **Next**

Figure 3: General Information page



5. On the Organization Information page, enter the Organization Name and Tax ID (FEIN), then click **Next**.

Note: The messages and Organization Profile screen will vary slightly between organizations that have been previously registered with a DHS system and those that are unknown to DHS systems. These sequences are outlined in A, B and C below.

A. Registered Organizations, No eCIS Business Category

- If your organization has a registered status, you will receive a message indicating that the organization does not have any business categories (see Figure 4: Organization Information page)
- Click **Register eCIS Business Category** button.
- A pop-up window will appear, click **OK** to continue with registering a Business Category.
- After leaving the Organization Information page, you will be taken to the Organization Profile page. Enter all required fields (see Figure 5: Organization Profile page).
 - Select the Commonwealth Program Office with whom you do business from the drop down.
 - Select the Business Category from the drop down that aligns with the services you provide.
 - Scroll down on the page and enter your contact information. The name entered here will need to be the same name entered on the Data Release Agreement Page on page 10 of this document.
 - Enter a detailed description of your operational need for access to DHS client information. Information noted here will be used to determine approval for access.
 - Answer security question.
 - Click **Next**.

Figure 4: Organization Information page

Register Business Partner Account eCIS: Organization Information

Error: [Organization Information] Your organization does not have any business categories. Please click the "Register eCIS Business Category" button below to add your location to your organization.

1 **General Information**

2 **Organization Information**

3 Organization Role

4 User Profile Information

5 Application Details

6 User Release Agreement

7 Security Questions

Required

To create a new Business Partner ID, please provide the following information about your Organization:
 Enter your 9-digit Organization Tax ID/Federal Employer Identification Number (FEIN) with no spaces or dashes (-) and your registered Organization Name. Please contact your Finance or HR Department Tax/Federal Employer Identification Number (FEIN).
Why is this information needed? We are asking for the Organization Tax ID and Organization Name so we can assign users to the appropriate organization in the system. After being assigned to the appropriate organization, users are given access to different tasks associated with their organization.

Organization Name:

Organization Tax ID:

Organization Registration Status:

Organization Address:

Can't find your Business Category? If your organization does not have any linked business categories or the , please click the 'Register eCIS Business Category' button below. Please note: The Register eCIS Business Category process will end when you leave to register your business category. You will need to start this process to create your eCIS Business Partner ID.

[Register eCIS Business Category](#)

BACK
NEXT
CANCEL

Figure 5: Organization Profile page

Register eCIS Business Category: Organization Profile

1 **Organization Profile**

2 Data Release Agreement

Required

Please provide the following information about your organization:

Organization Name:

Organization Tax ID:

Organization description:

Program Office:

Business Category:

Contact Person Information

First Name:

Last Name:

Email Address:

Primary Phone: Enter 10 digit phone number in the following format: XXX-XXX-XXXX

Business Operational Need

Brief explanation: Remaining Characters: 500

Please provide a brief explanation describing why you need to register the organization. If registration is required due to the nature of your job, please provide an overview of your job along with the tasks and/or duties you need to complete through the use of this application. Please note that the brief explanation you provide will be considered by the approver when reviewing your request.

For security reasons, please answer the following question:

Question: Seven plus ten plus 2 equals?

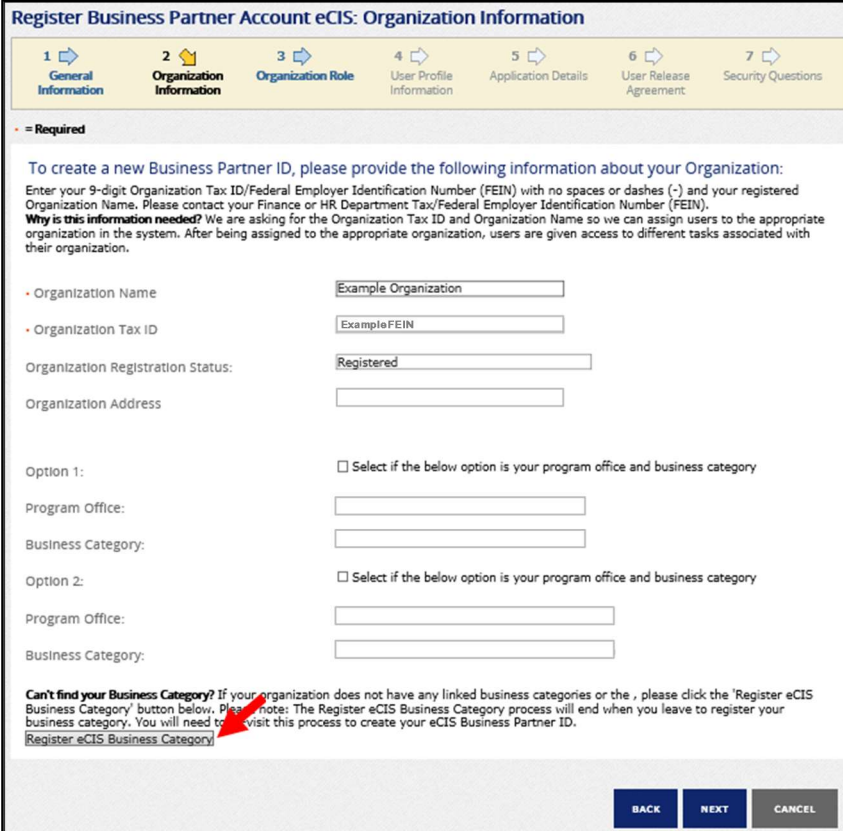
Answer:

NEXT
CANCEL

B. Registered Organizations, eCIS Business Category Needed Not Listed

- The system will display all eCIS Business Categories currently registered under the FEIN.
- Click the **Register eCIS Business Category** button (see Figure 6: Organization Information page).
- A pop-up window will appear, click **OK** to continue with registering a new Business Category.
- After leaving the Organization information page, you will be taken to the Organization Profile page. Enter all required fields (see Figure 7: Organization Profile page)
 - Select the Commonwealth Program Office with whom you do business from the drop down.
 - Select the Business Category from the drop down that aligns with the services you provide.
 - Scroll down the page and enter your contact information.
 - Enter a detailed description of your operational need for access to DHS client information. Include the Commonwealth program area you support (i.e. OCYF, OMAP, BCSE, etc.). Information noted here will be used to determine approval for access.
 - Answer security question.
 - Click **Next**.

Figure 6: Organization Information page



Register Business Partner Account eCIS: Organization Information

1 **General Information** 2 **Organization Information** 3 Organization Role 4 User Profile Information 5 Application Details 6 User Release Agreement 7 Security Questions

Required

To create a new Business Partner ID, please provide the following information about your Organization:
Enter your 9-digit Organization Tax ID/Federal Employer Identification Number (FEIN) with no spaces or dashes (-) and your registered Organization Name. Please contact your Finance or HR Department Tax/Federal Employer Identification Number (FEIN).
Why is this information needed? We are asking for the Organization Tax ID and Organization Name so we can assign users to the appropriate organization in the system. After being assigned to the appropriate organization, users are given access to different tasks associated with their organization.

Organization Name:

Organization Tax ID:

Organization Registration Status:

Organization Address:

Option 1: Select if the below option is your program office and business category

Program Office:

Business Category:

Option 2: Select if the below option is your program office and business category

Program Office:

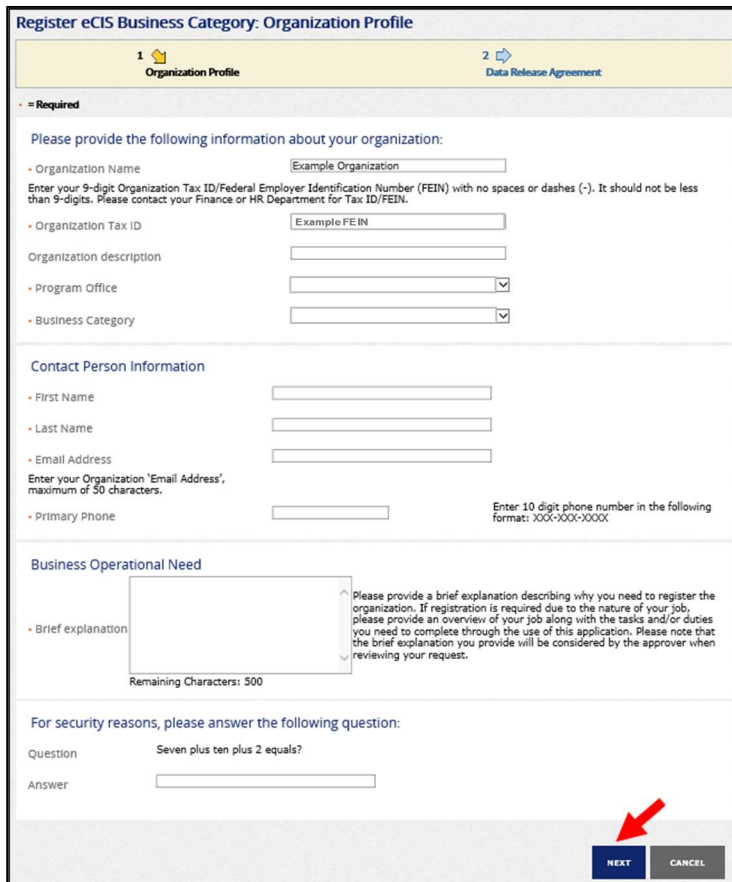
Business Category:

Can't find your Business Category? If your organization does not have any linked business categories or the , please click the 'Register eCIS Business Category' button below. Please note: The Register eCIS Business Category process will end when you leave to register your business category. You will need to revisit this process to create your eCIS Business Partner ID.



[Register eCIS Business Category](#)

BACK NEXT CANCEL

Figure 7: Organization Profile page



Register eCIS Business Category: Organization Profile

1  **Organization Profile** 2  **Data Release Agreement**

Required

Please provide the following information about your organization:

- Organization Name
- Organization Tax ID
Enter your 9-digit Organization Tax ID/Federal Employer Identification Number (FEIN) with no spaces or dashes (-). It should not be less than 9-digits. Please contact your Finance or HR Department for Tax ID/FEIN.
- Organization description
- Program Office
- Business Category

Contact Person Information

- First Name
- Last Name
- Email Address
- Primary Phone
Enter 10 digit phone number in the following format: XXX-XXX-XXXX

Business Operational Need

- Brief explanation
Please provide a brief explanation describing why you need to register the organization. If registration is required due to the nature of your job, please provide an overview of your job along with the tasks and/or duties you need to complete through the use of this application. Please note that the brief explanation you provide will be considered by the approver when reviewing your request.
Remaining Characters: 500

For security reasons, please answer the following question:

Question

Answer

NEXT **CANCEL**

C. Organizations Unknown to DHS Systems

- If your organization is not known to DHS systems, you will receive a message indicating that the organization doesn't exist (see Figure 8: Organization Information page) Click **Register eCIS Organization** button.
- A pop-up window will appear, click **OK** to continue with registering a new organization.
- After leaving the Organization information page, you will be taken to the Organization Profile page. Enter all required fields (see Figure 9: Organization Profile page).
 - Enter the name, description, and address of the organization.
 - Select the Commonwealth Program Office with whom you do business from the drop down.
 - Select the Business Category from the drop down that aligns with the services you provide.
 - Scroll down on page and enter your contact information.
 - Enter a detailed description of your operational need for access to DHS client information. Information noted here will be used to determine approval for access
 - Answer security question.
 - Click **Next**.

Figure 8: Organization Information page

Register Business Partner Account eCIS: Organization Information

Error: [Organization Information:Organization Registration Status] Your Organization doesn't exist in our system. Please click the button below to register a new organization.

1 **General Information** 2 **Organization Information** 3 Organization Role 4 User Profile Information 5 Application Details 6 User Release Agreement 7 Security Questions

Required

To create a new Business Partner ID, please provide the following information about your Organization:
 Enter your 9-digit Organization Tax ID/Federal Employer Identification Number (FEIN) with no spaces or dashes (-) and your registered Organization Name. Please contact your Finance or HR Department Tax/Federal Employer Identification Number (FEIN).
Why is this information needed? We are asking for the Organization Tax ID and Organization Name so we can assign users to the appropriate organization in the system. After being assigned to the appropriate organization, users are given access to different tasks associated with their organization.

• Organization Name

• Organization Tax ID

Organization Registration Status:

Can't find your organization? If your organization registration status is "Not Registered", please click the 'Register Organization' button below to register your organization. Please note: The Register eCIS Organization process will end when you leave to register your organization. You will need to re-visit this process to create your eCIS Business Partner ID.

[Register eCIS Organization](#)

Figure 9: Organization Profile page

Register eCIS Organization: Organization Profile

1 **Organization Profile** 2 Data Release Agreement

Required

Please provide the following information about your organization:

• Organization Name

Enter your 9-digit Organization Tax ID/Federal Employer Identification Number (FEIN) with no spaces or dashes (-). It should not be less than 9-digits. Please contact your Finance or HR Department for Tax ID/FEIN.

• Organization Tax ID

Organization description

• Street Address 1

Street Address 2

• City

• State

• Zip Code

Program Office

• Business Category

Contact Person Information

• First Name

• Last Name

• Email Address

Enter your Organization 'Email Address', maximum of 50 characters.

• Primary Phone

Business Operational Need

• Brief explanation

Please provide a brief explanation describing why you need to register the organization, if registration is required due to the nature of your job, please provide an overview of your job along with the tasks and/or duties you need to complete through the use of this application. Please note that the brief explanation you provide will be considered by the approver when reviewing your request.

Remaining Characters: 500

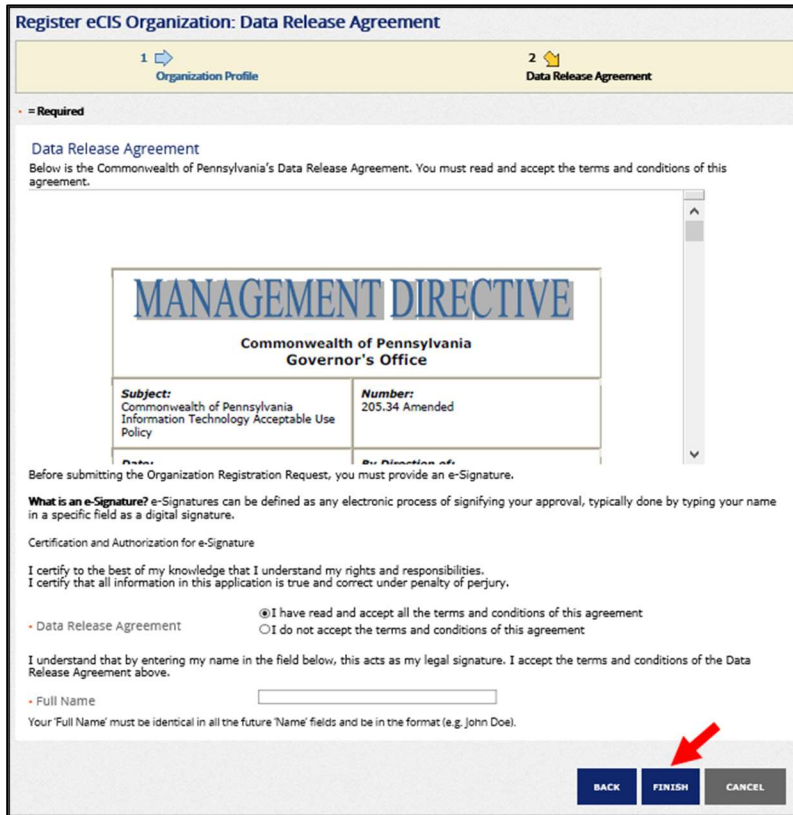
For security reasons, please answer the following question:

Question If today is Thursday, what day is tomorrow?

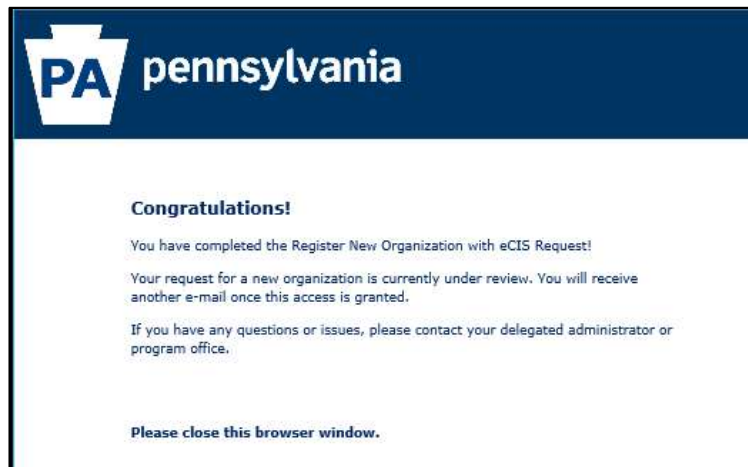
Answer

6. On the Data Release Agreement page, review the Data Release Agreement and accept if you agree to the terms and conditions. Enter your full name to e-Sign and click **Finish** (see Figure 10: Data Release Agreement page).
 - **Important** – The name entered as the signature must match the name entered to create account or an error will occur.

Figure 10: Data Release Agreement page



7. A message will be displayed stating the request has been successfully submitted and is waiting on approval. You will receive two emails: one confirming the request submission and another including the Program Office review outcome (approved or denied).



eCIS User Registration

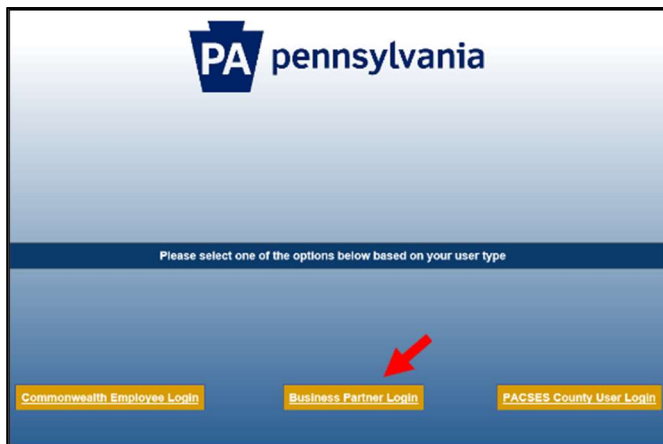
Once you receive a confirmation email that your organization has been approved, individuals may begin to register for eCIS access.

The first individual user to register must be your organization’s Delegated Administrator (DA). These individuals will be responsible for reviewing and approving/rejecting user requests for eCIS access. DAs are specific to an Organization/Program Office Affiliation/Business Category. Each registered organization and business category may have up to four DAs. At least one DA must be registered to enable user registration to begin.

In order to register, you will need your organization’s Federal Employer Identification Number (FEIN) and an active work email address.

1. From your internet browser navigate to the eCIS landing page
<https://intraapps.dpw.state.pa.us/mci/>
2. On the eCIS landing page, click **Business Partner Login** (see Figure 1: eCIS Landing page)

Figure 1: eCIS Landing page



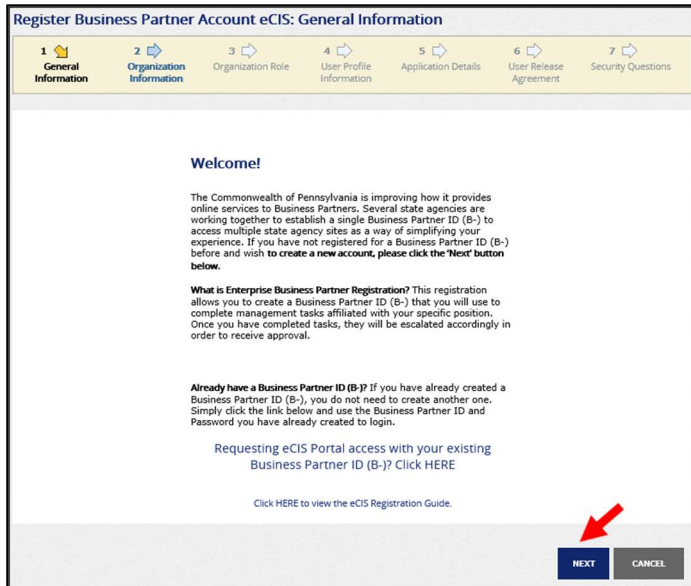
3. On the eCIS Login page, click **Register for eCIS** (see Figure 2: eCIS Login page)
 - No need to login – just click the link under Self-service for Business Partner

Figure 2: eCIS Login page



4. On the General Information page (see Figure 3: General Information page), click **Next**

Figure 3: General Information page



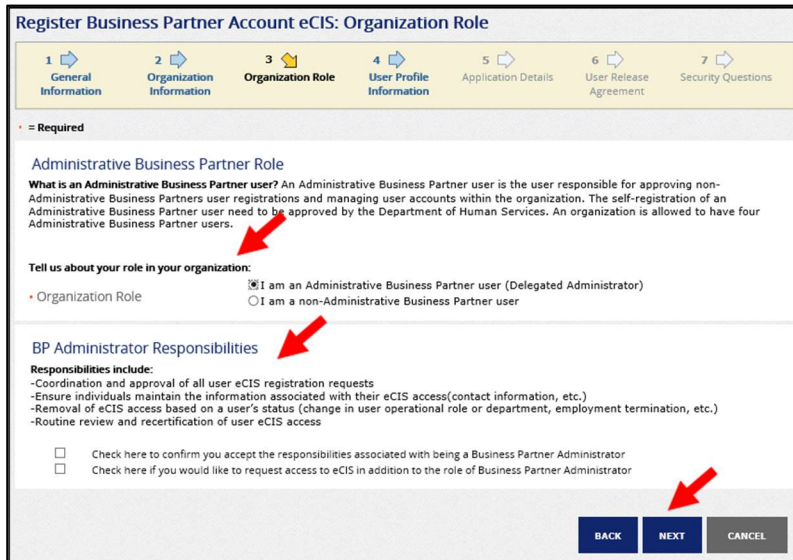
5. On the Organization Information page, enter the Organization Name and Tax ID (FEIN) (see Figure 4: Organization Information page).
- The system will display all Business Categories currently registered under the FEIN, select the Business Category that describes your operational function. Click **Next**

Figure 4: Organization Information page



6. On the Organization Role page, select the type of user function to be requested (see Figure 5: Organization Role page).
 - Click one of the radio buttons to indicate the type of user role required.
 - If the Administrative Business Partner user (Delegated Administrator) role is chosen, review and accept the associated responsibilities and click the check box to confirm. Click the second check box if you would like to request eCIS access in addition to the Administrative Business Partner role.
 - Click **Next**

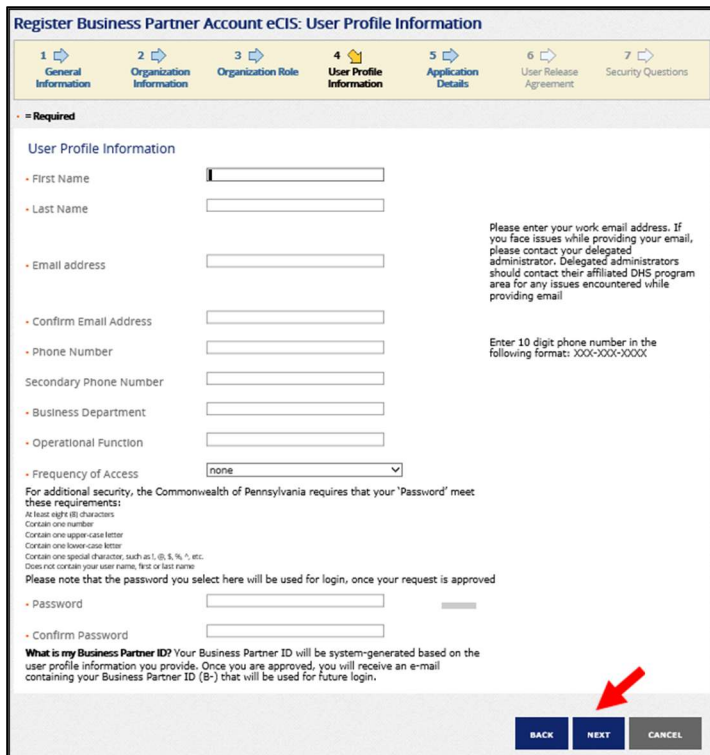
Figure 5: Organization Role page



7. On the User Profile Information page, fill out all required information (see Figure 6: User Profile Information page). Click **Next**.

Note: If your email address is already in use with another DHS account, please follow the registration flow for an existing user. If the account associated with the email address is not yours, contact your organization’s eCIS Delegated Administrator.

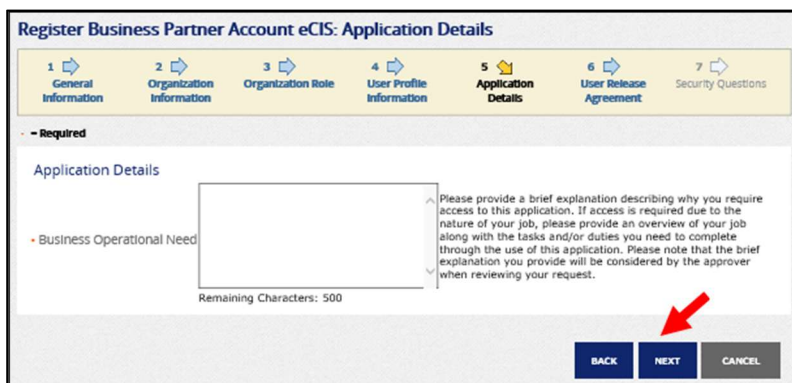
Figure 6: User Profile Information page



On the Application Details page, enter a detailed description of your operational need for access to DHS client information (see Figure 7: eCIS Application Details page). Click **Next**.

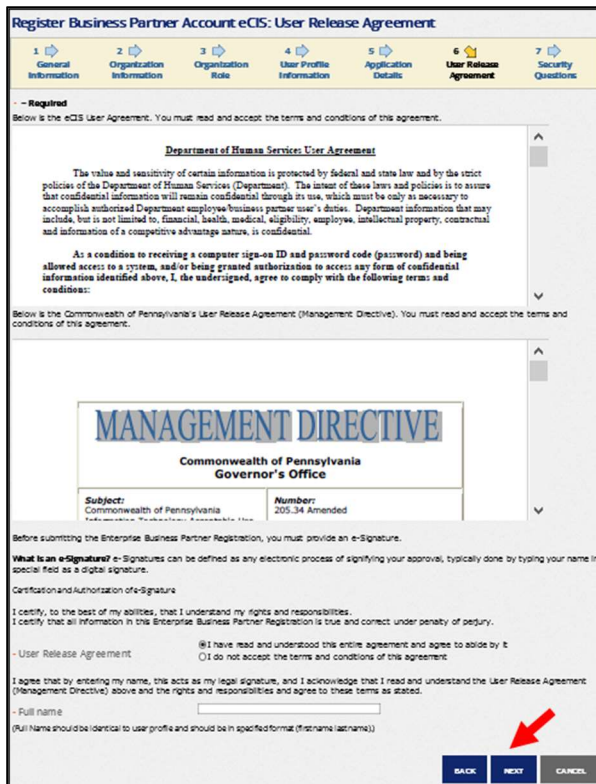
Information noted here will be used to determine approval for access.

Figure 7: eCIS Application Details page



8. On the User Release Agreement page, read the User Confidentiality Agreement and Management Directive (see Figure 8: User Release Agreement page). Select that you have read and understand the entire agreement. Enter your Full Name in the box to e-Sign. Click **Next**.

Figure 8: User Release Agreement page



Register Business Partner Account eCIS: User Release Agreement

1 General Information 2 Organization Information 3 Organization Role 4 User Profile Information 5 Application Details 6 **User Release Agreement** 7 Security Questions

Required

Below is the eCIS User Agreement. You must read and accept the terms and conditions of this agreement.

Department of Human Services User Agreement

The value and sensitivity of certain information is protected by federal and state law and by the strict policies of the Department of Human Services (Department). The intent of these laws and policies is to assure that confidential information will remain confidential through its use, which must be only as necessary to accomplish authorized Department employee/business partner user's duties. Department information that may include, but is not limited to, financial, health, medical, eligibility, employee, intellectual property, contractual and information of a competitive advantage nature, is confidential.

As a condition to receiving a computer sign-on ID and password code (password) and being allowed access to a system, and/or being granted authorization to access any form of confidential information identified above, I, the undersigned, agree to comply with the following terms and conditions:

Below is the Commonwealth of Pennsylvania's User Release Agreement (Management Directive). You must read and accept the terms and conditions of this agreement.

MANAGEMENT DIRECTIVE

Commonwealth of Pennsylvania
Governor's Office

Subject: Commonwealth of Pennsylvania Number: 205-34 Amended

Before submitting the Enterprise Business Partner Registration, you must provide an e-Signature.

What is an e-Signature? e-Signatures can be defined as any electronic process of signifying your approval, typically done by typing your name in special field as a digital signature.

Certification and Authorization of e-Signature

I certify, to the best of my abilities, that I understand my rights and responsibilities.
I certify that all information in this Enterprise Business Partner Registration is true and correct under penalty of perjury.

I have read and understood this entire agreement and agree to abide by it
 I do not accept the terms and conditions of this agreement

I agree that by entering my name, this acts as my legal signature, and I acknowledge that I read and understand the User Release Agreement (Management Directive) above and the rights and responsibilities and agree to these terms as stated.

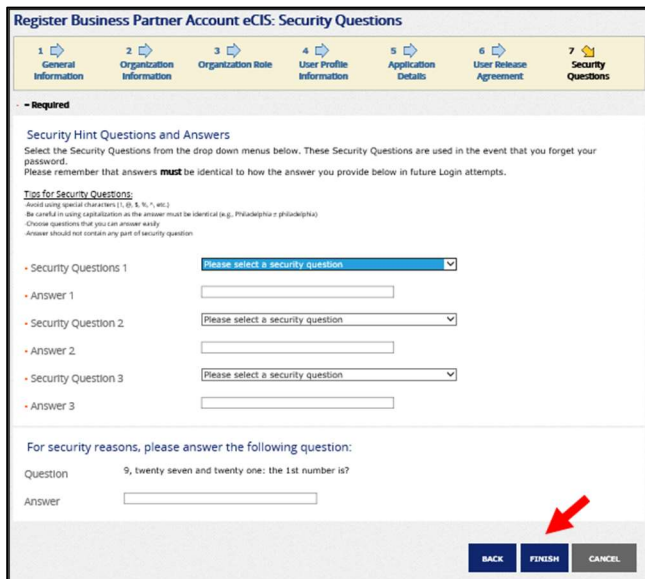
Full name

(Full Name should be identical to user profile and should be in specified format (firstname.lastname))

BACK NEXT CANCEL

- On the Security Questions page, select and answer the three security questions (see Figure 9: Security Questions page). It is important you remember the answer to these questions as you will use them to access your account if you forget your password. Scroll down to answer the security question. Click **Finish**.

Figure 9: Security Questions page



Register Business Partner Account eCIS: Security Questions

1 General Information 2 Organization Information 3 Organization Role 4 User Profile Information 5 Application Details 6 User Release Agreement 7 **Security Questions**

Required

Security Hint Questions and Answers

Select the Security Questions from the drop down menus below. These Security Questions are used in the event that you forget your password.
Please remember that answers **must** be identical to how the answer you provide below in future Login attempts.

Tips for Security Questions:
- Avoid using special characters (!, @, & % ^, etc.)
- Be careful in using capitalization as the answer must be identical (e.g., Philadelphia ≠ philadelphia)
- Choose questions that you can answer easily
- Answer should not contain any part of security question

Security Questions 1:
Answer 1:

Security Question 2:
Answer 2:

Security Question 3:
Answer 3:

For security reasons, please answer the following question:

Question: 9, twenty seven and twenty one: the 1st number is?
Answer:

BACK FINISH CANCEL

10. When you have finished, a message will be displayed stating the request has been successfully submitted and is waiting on approval. You will receive an email noting the outcome of your request. If approved, your Business Partner ID will be emailed to you.

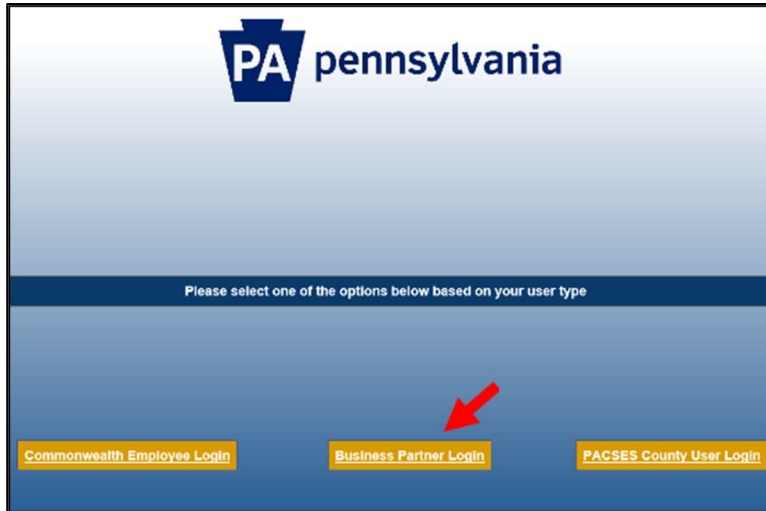


Existing Commonwealth Account Users

eCIS Organization Registration

1. From your internet browser navigate to eCIS landing page
<https://intraapps.dpw.state.pa.us/mci/>
2. On the eCIS Landing page, click **Business Partner Login** (see Figure 1: eCIS Landing page).

Figure 1: eCIS Landing page



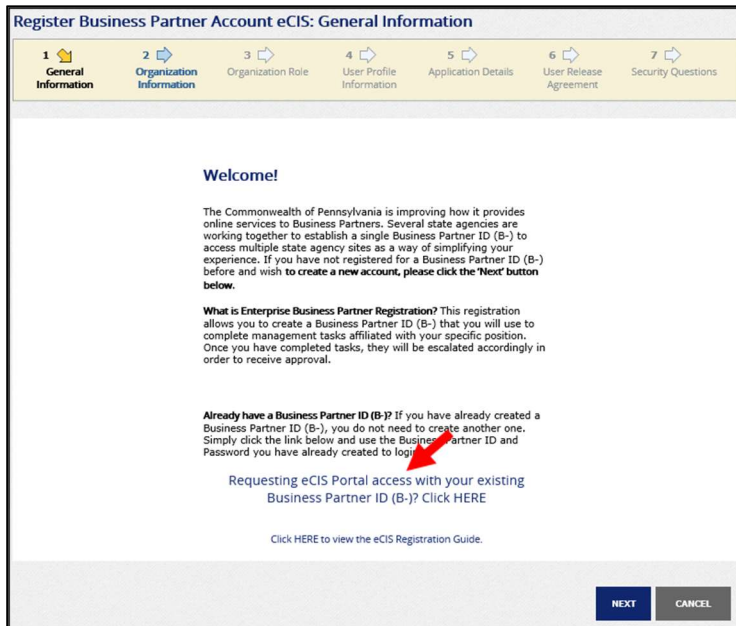
3. On the eCIS Login page, click **Register for eCIS** (see Figure 2: eCIS Login page)
 - No need to login – just click the link under Self-service for Business Partner

Figure 2: eCIS Login page



4. On the General Information Welcome page (see Figure 3: General Information page), click **Requesting eCIS Portal access with your existing Business Partner ID (B-)? Click HERE.**

Figure 3: General Information page



5. On the Identity Manager Landing page, enter your user name and password (b- account) and **Login** to the eCIS registration process (see Figure 4: Identity Manager Login page).

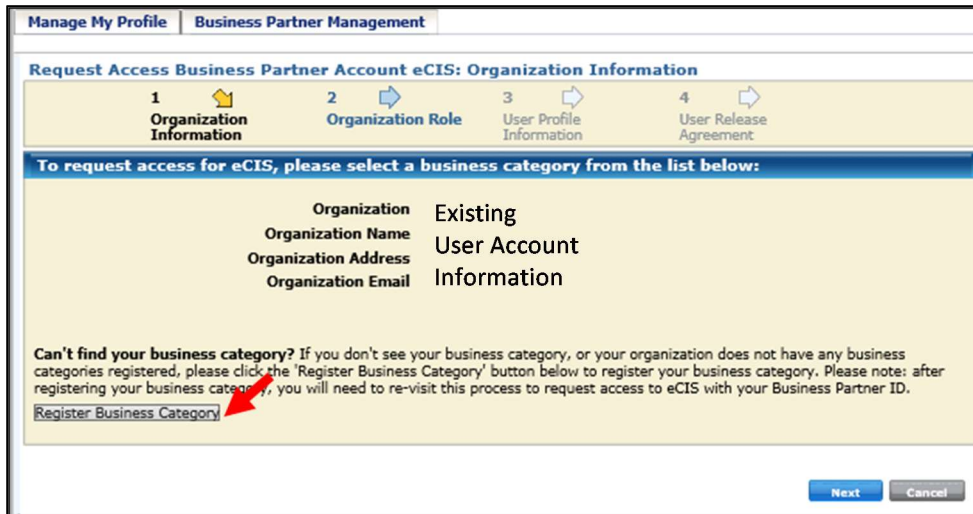
Figure 4: Identity Manager Login page



6. On the Organization Information page:
 - Your existing b- account information will be prepopulated.
 - If your organization has not yet been registered for eCIS, there will be no Program Office or Business Category listed (see Figure 5: Organization Information page), click **Register Business Category** button.
 - Or, if you do not see the appropriate Program Office and Business Category (see Figure 6: Organization Information page), click **Register Business Category** button.
 - A pop-up window will appear, click **OK** to continue with registering a Business Category.
 - After leaving the Organization information page, you will be taken to the Organization Profile page. Enter all required fields (see Figure 7: Organization Profile page).

- Select the Commonwealth Program Office with whom you do business from the drop down.
- Select the Business Category that aligns with the services you provide from the drop down list.
- Enter a detailed description of your operational need for access to DHS client information. Information noted here will be used to determine approval for access to eCIS.
- Click **Next**.

Figure 5: Organization Information page



Manage My Profile | Business Partner Management

Request Access Business Partner Account eCIS: Organization Information

1 Organization Information | 2 Organization Role | 3 User Profile Information | 4 User Release Agreement

To request access for eCIS, please select a business category from the list below:

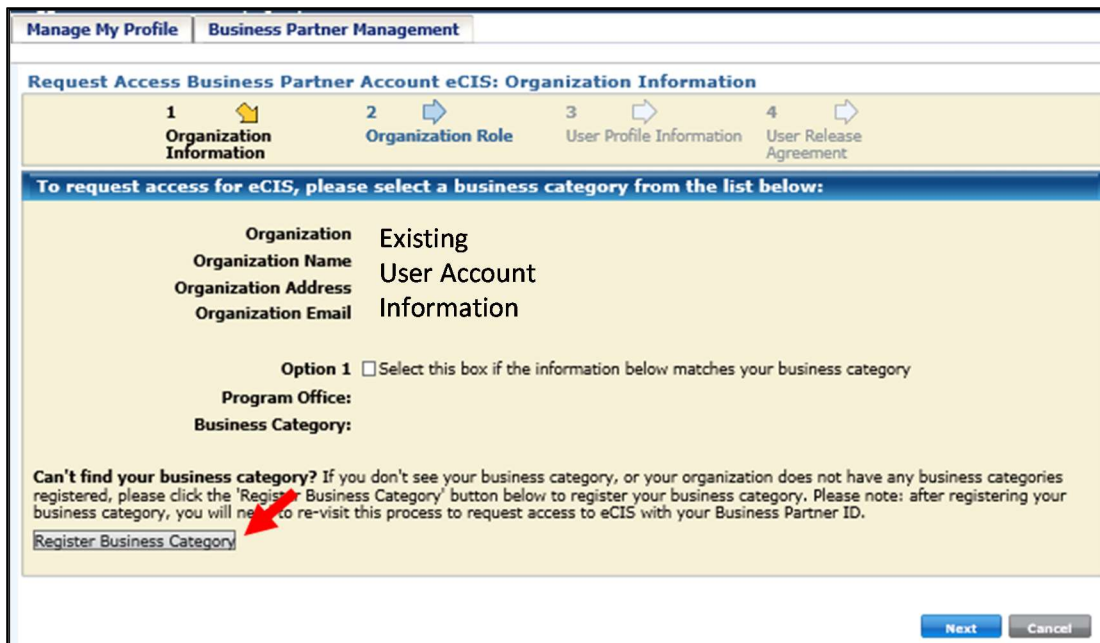
Organization Existing
Organization Name User Account
Organization Address Information
Organization Email Information

Can't find your business category? If you don't see your business category, or your organization does not have any business categories registered, please click the 'Register Business Category' button below to register your business category. Please note: after registering your business category, you will need to re-visit this process to request access to eCIS with your Business Partner ID.

Register Business Category

Next Cancel

Figure 6: Organization Information page



Manage My Profile | Business Partner Management

Request Access Business Partner Account eCIS: Organization Information

1 Organization Information | 2 Organization Role | 3 User Profile Information | 4 User Release Agreement

To request access for eCIS, please select a business category from the list below:

Organization Existing
Organization Name User Account
Organization Address Information
Organization Email Information

Option 1 Select this box if the information below matches your business category

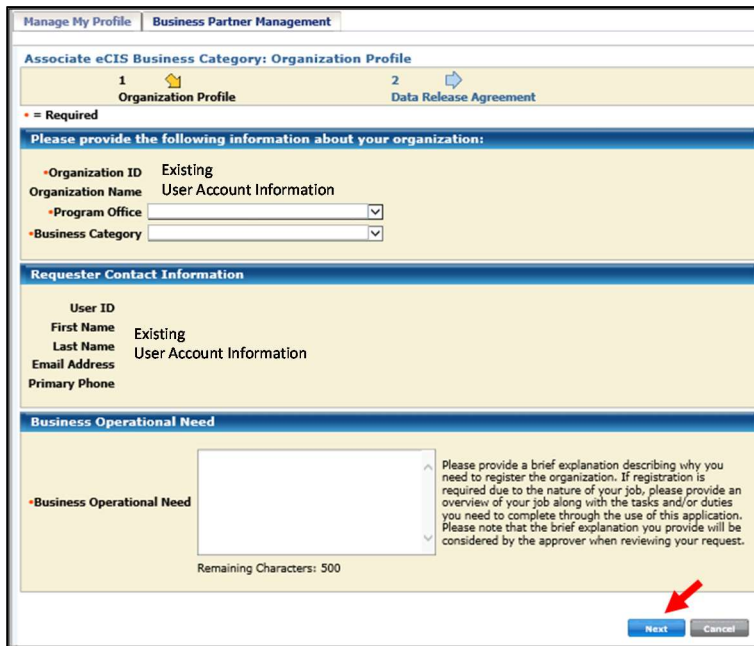
Program Office:
Business Category:

Can't find your business category? If you don't see your business category, or your organization does not have any business categories registered, please click the 'Register Business Category' button below to register your business category. Please note: after registering your business category, you will need to re-visit this process to request access to eCIS with your Business Partner ID.

Register Business Category

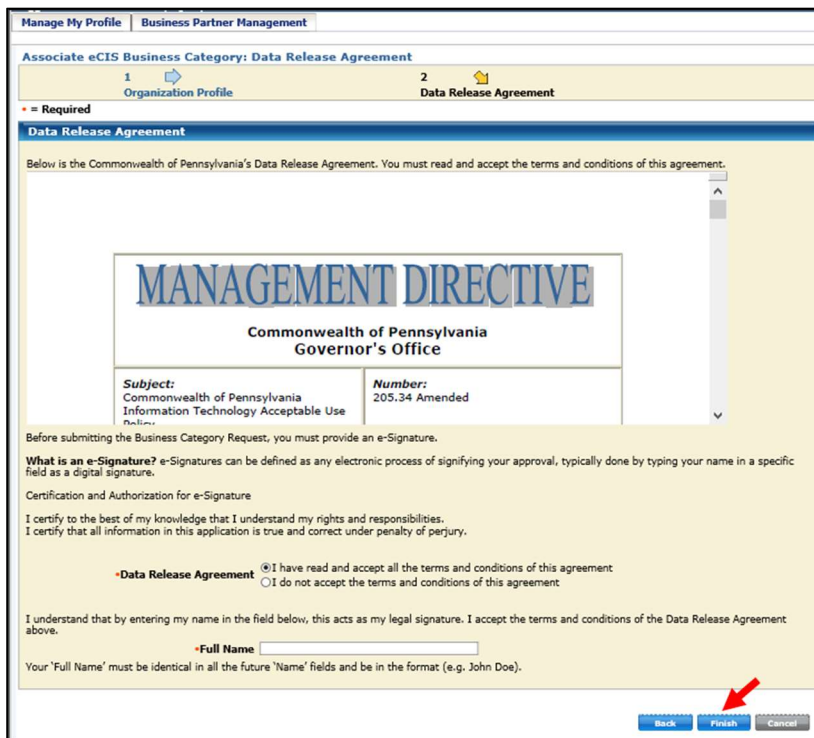
Next Cancel

Figure 7: Organization Profile page



7. On the Data Release Agreement page, review the Data Release Agreement and accept if you agree to the terms and conditions (see Figure 8: Data Release Agreement page). Enter your full name to e-Sign. Click **Finish**.
 - **Important** – Name entered as the signature must match the name entered to create account or an error will occur.

Figure 8: Data Release Agreement page



8. A message will be displayed stating the request has been successfully submitted and is waiting on approval. You will receive two emails: one confirming the request submission and another including the Program Office review outcome (approved or denied).



eCIS User Registration

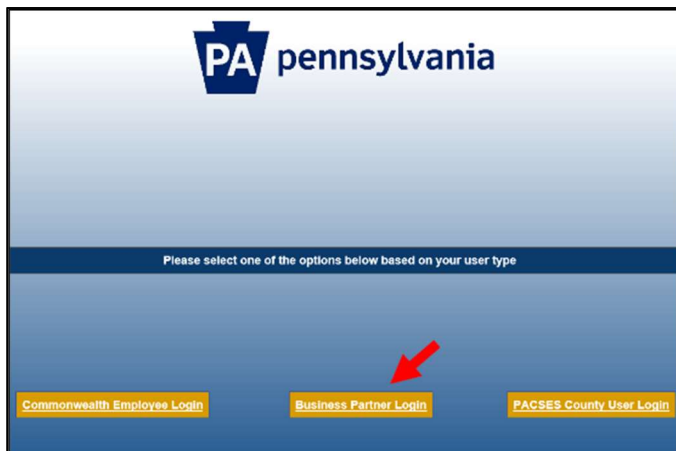
Once you receive a confirmation email that your organization has been approved, individuals may begin to register for eCIS access.

The first individual user to register must be your organization's Delegated Administrator (DA). These individuals will be responsible for reviewing and approving/rejecting user requests for eCIS access. DAs are specific to an Organization/Program Office Affiliation/Business Category. Each registered organization and business category may have up to four DAs. At least one DA must be registered to enable user registration to begin.

In order to register you will need your organization's Federal Employer Identification Number (FEIN) and an active work email address.

1. From your internet browser navigate to the eCIS landing page
<https://intraapps.dpw.state.pa.us/mci/>
2. On the eCIS Landing page, click **Business Partner Login** (see Figure 1: eCIS Landing page)

Figure 1: eCIS Landing page



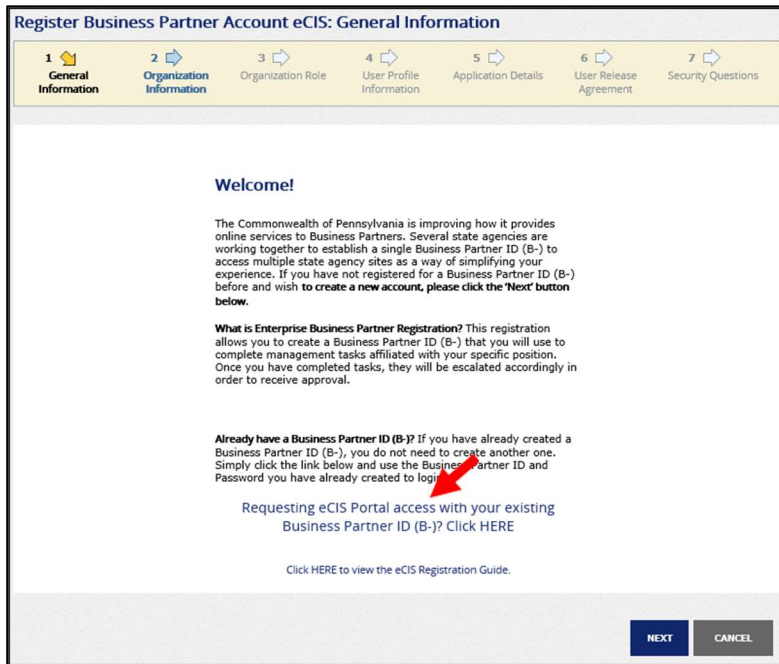
3. On the eCIS Login page, click **Register for eCIS** (see Figure 2: eCIS Login page)
 - No need to login – just click the link under Self-service Business Partner

Figure 2: eCIS Login page



4. On the General Information Welcome page (see Figure 3: General Information page), click **Requesting eCIS Portal access with your existing Business Partner ID (B-)?** Click **HERE**.

Figure 3: General Information page



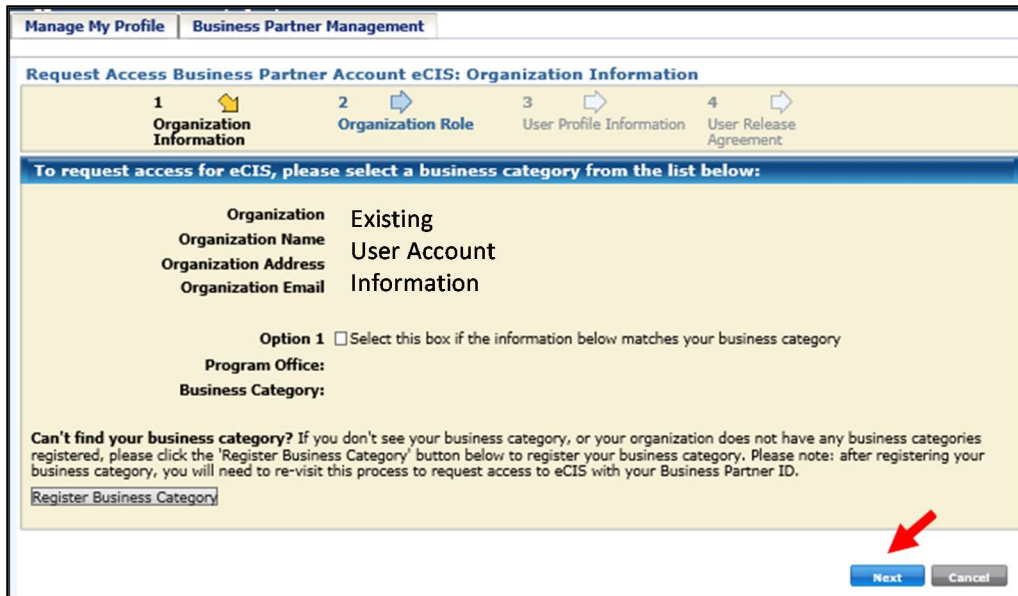
5. On the Identity Manager Landing page, enter your user name and password (b- account) and **Login** to the eCIS registration process (see Figure 4: Identity Manager Login page).

Figure 4: Identity Manager Login page



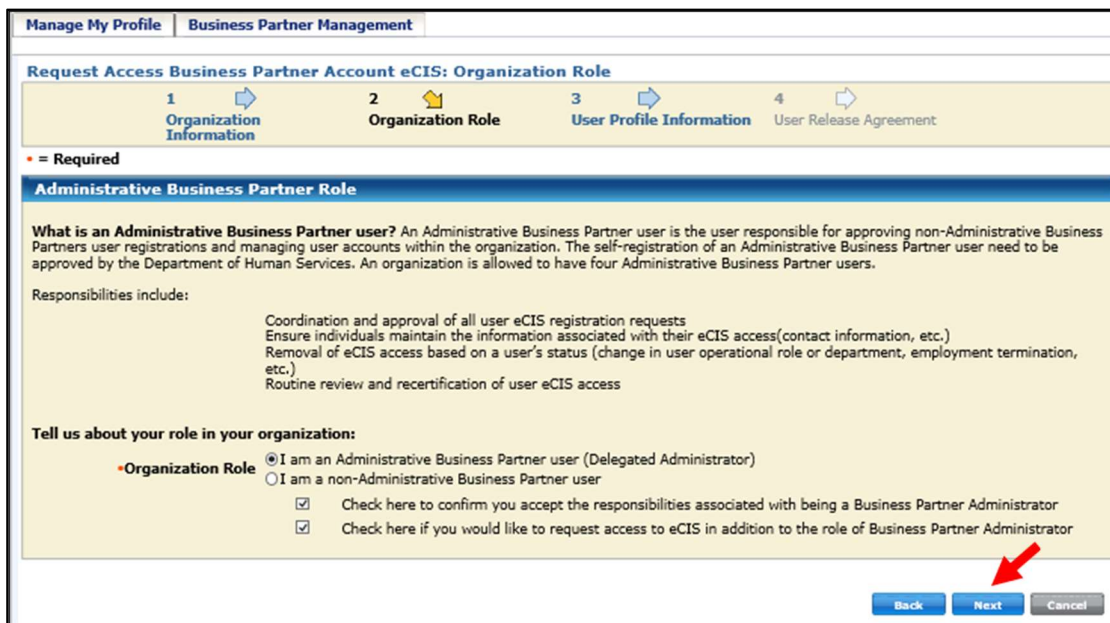
6. On the Organization Information Page, all eCIS Business Categories registered with the FEIN will be listed, select the Business Category that describes your operational function (see Figure 5: Organization Information page). Click **Next**.

Figure 5: Organization Information page



7. On the Organization Role page, select the type of user function to be requested (see Figure 6: Organization Role page)
 - Click one of the radio buttons to indicate the type of user role required
 - If the Administrative Business Partner User (Delegated Administrator) role is chosen, review and accept the associated responsibilities and click the check box to confirm. Click the second check box if you would like to request eCIS access in addition to the Administrative Business Partner role.
 - Click **Next**.

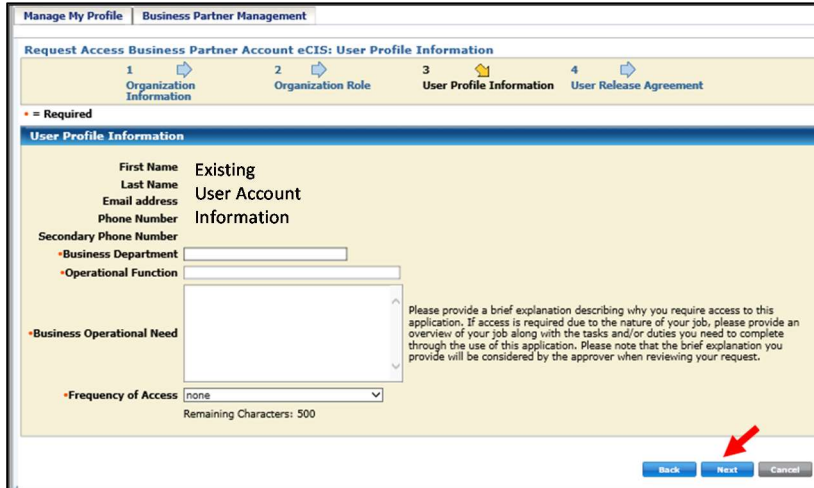
Figure 6: Organization Role page



- On the User Profile Information page, enter all required information and click **Next** (see Figure 7: User Profile Information page).

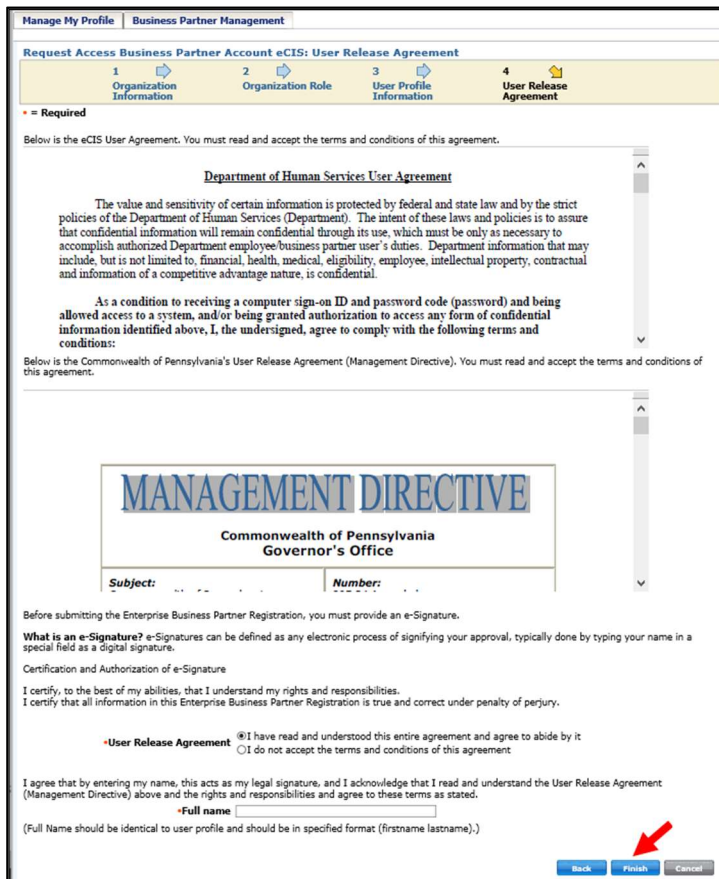
Note: Information included here will be used to determine approval for access.

Figure 7: User Profile Information page



- On the User Release Agreement page, read the User Confidentiality Agreement and Management Directive (see Figure 8: User Release Agreement page). Select that you have read and understand the entire agreement. Enter your Full Name in the box to e-Sign. Click **Finish**.

Figure 8: User Release Agreement page



10. When you have finished, a message will be displayed stating the request has been successfully submitted and is waiting on approval. You will receive an email noting the outcome of your request. If approved, your Business Partner ID will be emailed to you.



Identity Manager Console

Logging In

Identity Manager (IDM) is where user and organization management occurs.

1. From your internet browser navigate to the IDM login page.
<https://www.hhsidm.state.pa.us/iam/im/businesspartners/>
2. On the IDM login page, enter your user name and password (b- account) to **Login** to the Identity Manager console (see Figure 1: Identity Manager Login page). **Please note:** There is no access to the eCIS registration process from this page. Refer to the instructions outlined in previous sections of this document to register for eCIS access.

Figure 1: IDM Login page



Manage My Profile

Under the Manage My Profile tab a user can change their email, password, security questions, and view their user agreement by clicking on the links in the left hand navigation pane or the short-cuts in the main panel. Follow the instructions on the screen for each option.

There is also an online help manual link to assist with completing the manage profile tasks.



Business Partner Management

Manage Organization

Under the **Manage Organization** task, a user may associate a new business category to their organization.



Manage Users

Under the **Manage Users** task, a user may request promotion to, or demotion from, a Delegated Administrator role. Follow the instructions on the screen to complete the task.



View eCIS User Agreement

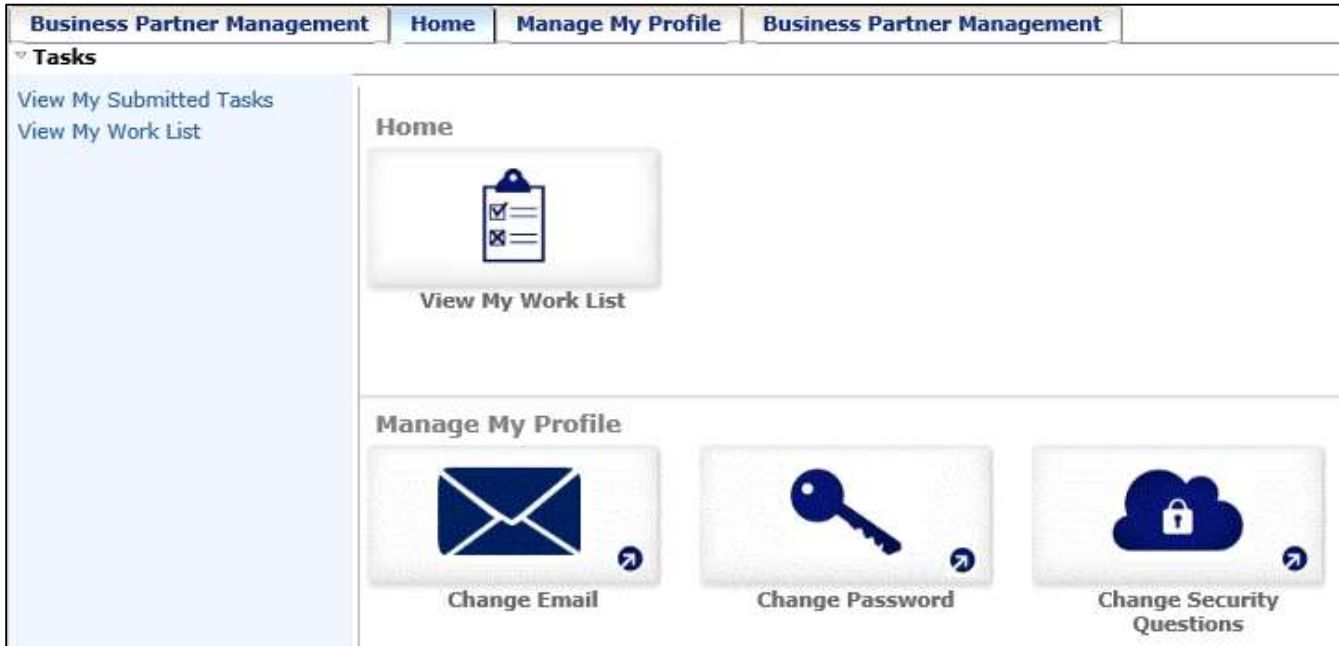
The eCIS user agreement and management directive presented during registration may be viewed here as a PDF. Click the **View eCIS User Agreement** link to view.



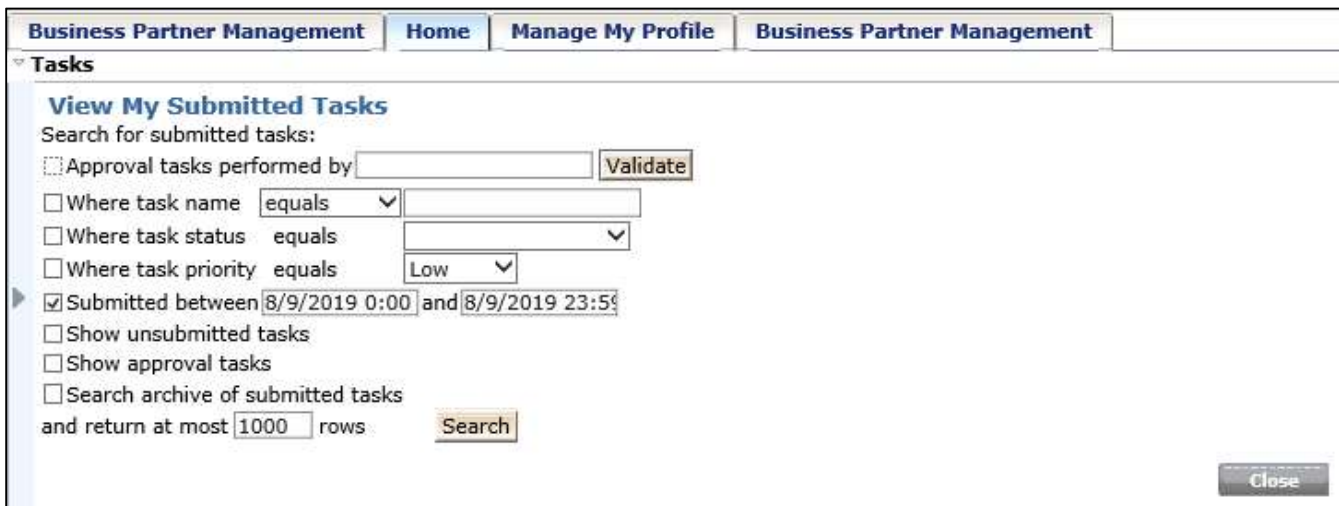
Delegated Administrators Only

Home Page – Tasks and Work List

The Home page provides access to view current and previous registration work items.



The **My Submitted** task, allows a user to search for work items by several criterion. Follow the instructions on the screen to search for work items.



The **View My Work** List contains pending registration work items.

Business Partner Management	Home	Manage My Profile	Business Partner Management	
---	----------------------	-----------------------------------	---	--

View My Work List

Status	Name	Last Updated On	Initiated By	Workflow Level
	First Level Approval - Modify user " (b-example) "	8/8/19 4:07 PM	(b-example)	Event Level Workflow

[Refresh](#)

[Cancel](#)

1. Click on the request to open the full registration request.
 - Confirm the individual is within your organization and fits the business category selected (see Figure 1 for below for a current b-account user and Figure 2 for a new user account request).
 - Evaluate the User Information provided justifies the need for eCIS access.
 - Add comments as needed.
 - Select a decision from the drop down box.
 - Click the **Approve** or **Reject** button as appropriate (these buttons will appear after a decision is selected).
 - An email notification with the outcome of the request will be sent to the user.
 - The request will be automatically sent to the appropriate Commonwealth Program Office Representative for processing.

Figure 1: Current b-account user request

Business Partner Management	Home	Manage My Profile	Business Partner Management
---	----------------------	-----------------------------------	---

Request Access Business Partner Account eCIS - Level 1 Approval: (b-example)
[View My Work List](#) > Request Access Business Partner Account eCIS - Level 1 Approval: (b-example)

Title: First Level Approval - Modify user * (b-example)
Item State: Available
Initiated by: (b-example)
Created on: 8/8/19 4:07 PM

You can choose one of the following options:

Please select a decision above

Reserve Item Reserve the work item and remove it from work lists of other approvers

Reserving this work item removes it from work lists of other approvers.

[Profile](#) | [Approvers](#)

• = Required

An existing Business Partner user has requested access to eCIS with the following information. Either **Approve**, **Reject**, or **Reserve** the work item.
 If applicable, please add any notes in the 'Comments' section below. These notes will be sent to the Business Partner if the work item is rejected.

User Information

Organization

User ID (b-example)
First Name First
Last Name Name
E-Mail address Example email
Primary Phone 328-038-1844
Mobile Phone
Business Department Example
Operational Function Example
Business Operational Need Example
Frequency of Access daily
User Agreement MD 205,08/08/2019 16:07:31 PM,

Organization Information

Organization Address Example address
Organization Email Example email
Program Office Example Program Office
Business Category Example Business Category

Provided Access

Application Role Assigned: Example eCIS Role

Comments

If applicable, please add any notes in the 'Comments' section below. These notes will be sent to the Business Partner if the work item is rejected.

Enter Comments Here

• **Decision**

Figure 2: New User Account Request

Business Partner Management
Home
Manage My Profile
Business Partner Management

Register Business Partner Account eCIS - Level 1 Approval: (b-example)
[View My Work List](#) > [Register Business Partner Account eCIS - Level 1 Approval: \(b-example\)](#)

Title: First Level Approval - Registering user (b-example)
Item State: Available
Initiated by: (b-example)
Created on: 8/12/19 3:13 PM

You can choose one of the following options:

Please select a decision above

Reserve Item Reserve the work item and remove it from work lists of other approvers

Reserving this work item removes it from work lists of other approvers.

Profile
Approvers

• = Required

A Business Partner has created an Organization Request with the following information. Either **Approve**, **Reject**, or **Reserve** the work item.
 If applicable, please add any notes in the 'Comments' section below. These notes will be sent to the Business Partner if the work item is rejected.

User Information

Organization

User ID (b-example)
First Name First
Last Name Last
E-Mail address Example email
Primary Phone 717-321-3214
Mobile Phone
Business Department Example
Operational Function Example
Frequency of Access weekly
User Agreement MD 205,08/12/2019 15:13:06 PM,

Organization Information

Organization Tax ID Example FEIN
Organization Name (present in system) Example Name
Organization Name (entered by user) Example Name
Organization Address Example address
Organization Registerer Name Example Name
Organization Registerer Email Example email
Business Category Registerer Name Example Business Category
Business Category Registerer Email Example email

Program Office Example Program Office
Business Category Example Business Category

Brief explanation

Brief explanation

Provided Access

Application Role Assigned: Example role

Comments

If applicable, please add any notes in the 'Comments' section below. These notes will be sent to the Business Partner if the work item is rejected.

Enter Comments Here

Decision

Delegated administrators will also receive an **email notification** when users within their organization and business category submit an eCIS registration request. A **link** to the Identity Manager login page will be included in the body of the email. A sample email is provided below.

From: automatedmailDONOTREPLY@pa.gov [<mailto:automatedmailDONOTREPLY@pa.gov>]
Sent: Friday, August 09, 2019 11:06 AM
To:
Subject: Action Required: Request for Register Business Partner Account eCIS
Approval: OU=NonFEINOU : b-exatester

Please do not reply to this e-mail, all replies are sent to an unmonitored account.

A new eCIS Business Partner Registration Request, created on 08.09.19, requires your approval. This request has been added to your work list. More information about the request is below:

- Username: **b-exatester** has initiated a request for approval on **08.09.19**.
- First Name: Example
- Last Name: Tester

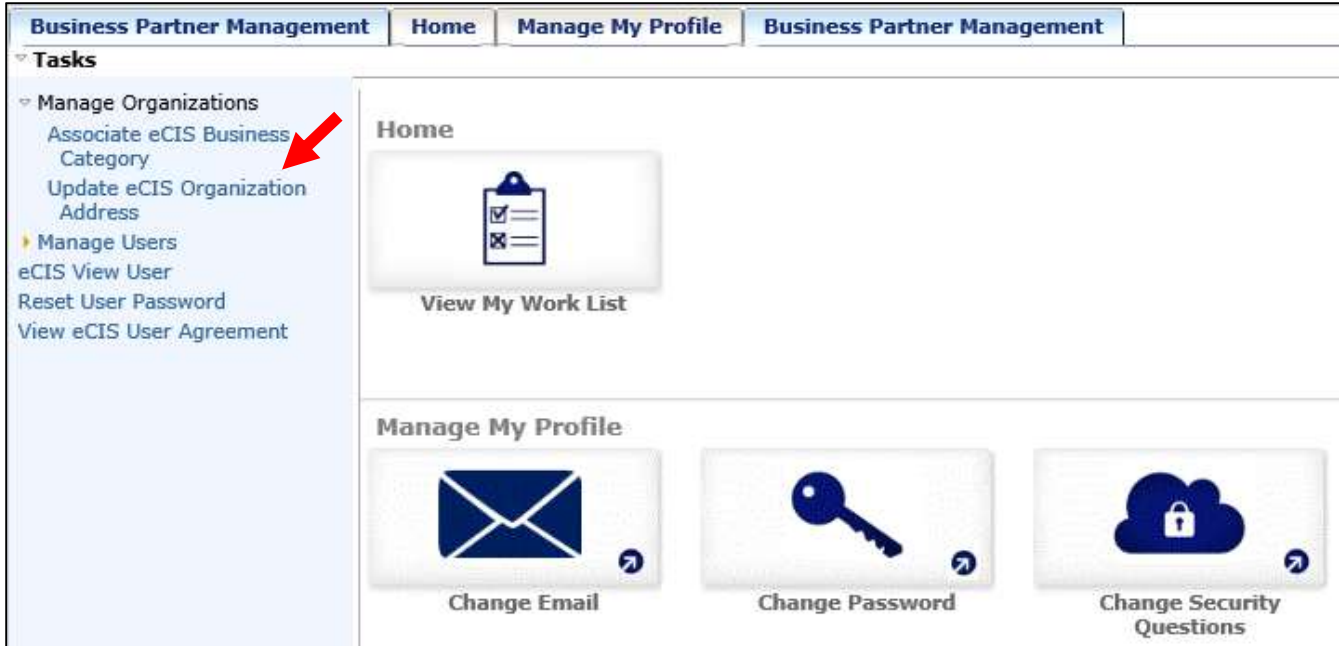
- Program Office:
- Business Category:

Please login via this **[link](#)** to take further action on this request.

Business Partner Management

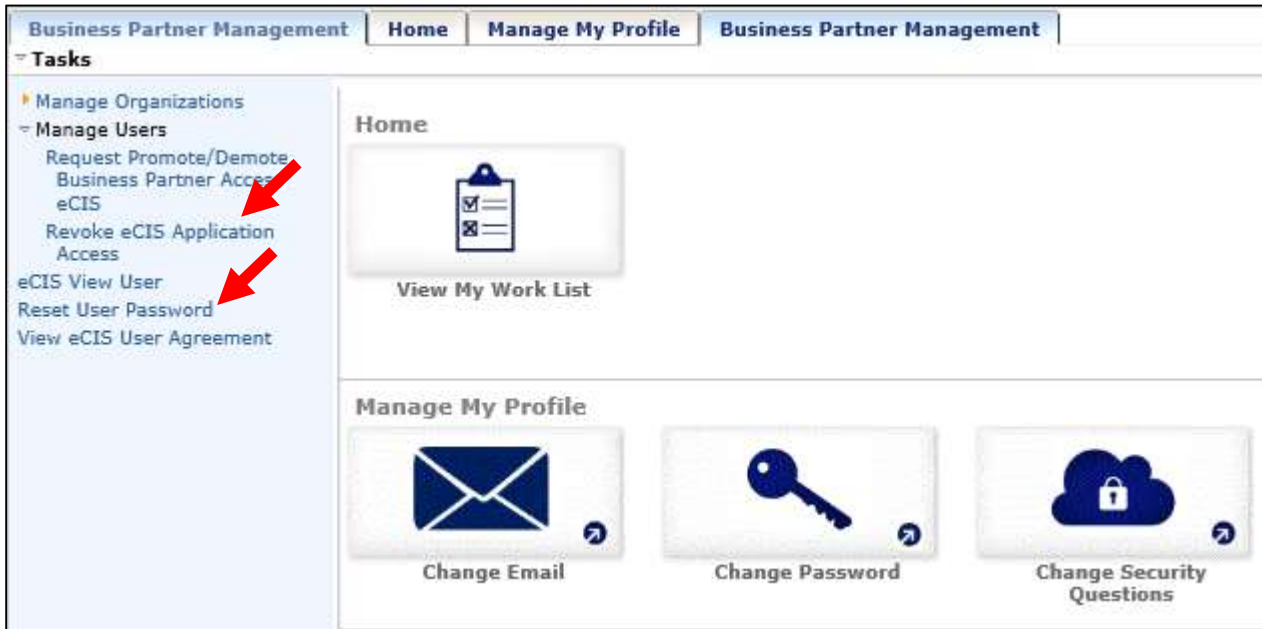
Delegated Administrators have additional functionality under the Business Partner Management tab.

Under the Manage Organization task, Delegated Administrators may request to update their organization's address. Follow the instructions on the screen.



Under the Manage Users task, Delegated Administrators have the ability to revoke eCIS access for users in their organization and business category.

Delegated Administrators also have the ability to reset a password for users in their organization and business category. Follow the instructions on the screen.



Appendix

Commonwealth Program Areas and Associated Business Categories (as of 12/19/19)

Commonwealth Program Area	Business Category
Office of Medical Assistance Programs (OMAP)	MA Managed Care Organization – Physical Health
	Enrollment Assistance Contractor
Children's Health Insurance Program (CHIP)	CHIP Managed Care Organization
Office of Developmental Programs (ODP)	ODP ID/A Administration
Office of Children, Youth and Families (OCYF)	CYA - Intake/Investigation Worker
	CYA - Eligibility Determination
	CYA - Healthcare Liaison
	CYA - Diligent Search
Office of Child Development and Early Learning (OCDEL)	Early Learning Resource Centers
	Early Intervention Support Coordinator
Bureau of Child Support Enforcement (BCSE)	Domestic Relation Sections
	BCSE IT Contractor
Bureau of Employment Programs (BEP)	Schools and Universities
	Workforce Development Organization
Office of Long-Term Living (OLTL)	CHC Choice Counseling
	HCBS Enrollment
Department of Health	WIC Provider
Office of Mental Health and Substance Abuse	County Mental Health Office - CCRI Initiative or Behavioral Health HealthChoices Contract
	MA Managed Care Organization – Behavioral Health