

Innovate  
Ohio  
**Platform**

# Electronic Data Interchange (EDI) Trading Partner Job Aid

*December 13, 2022*



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# Creating an OH|ID

*If Trading Partners do not have an OH|ID, they will need to create an account before continuing with EDI login and MFA enrollment.*

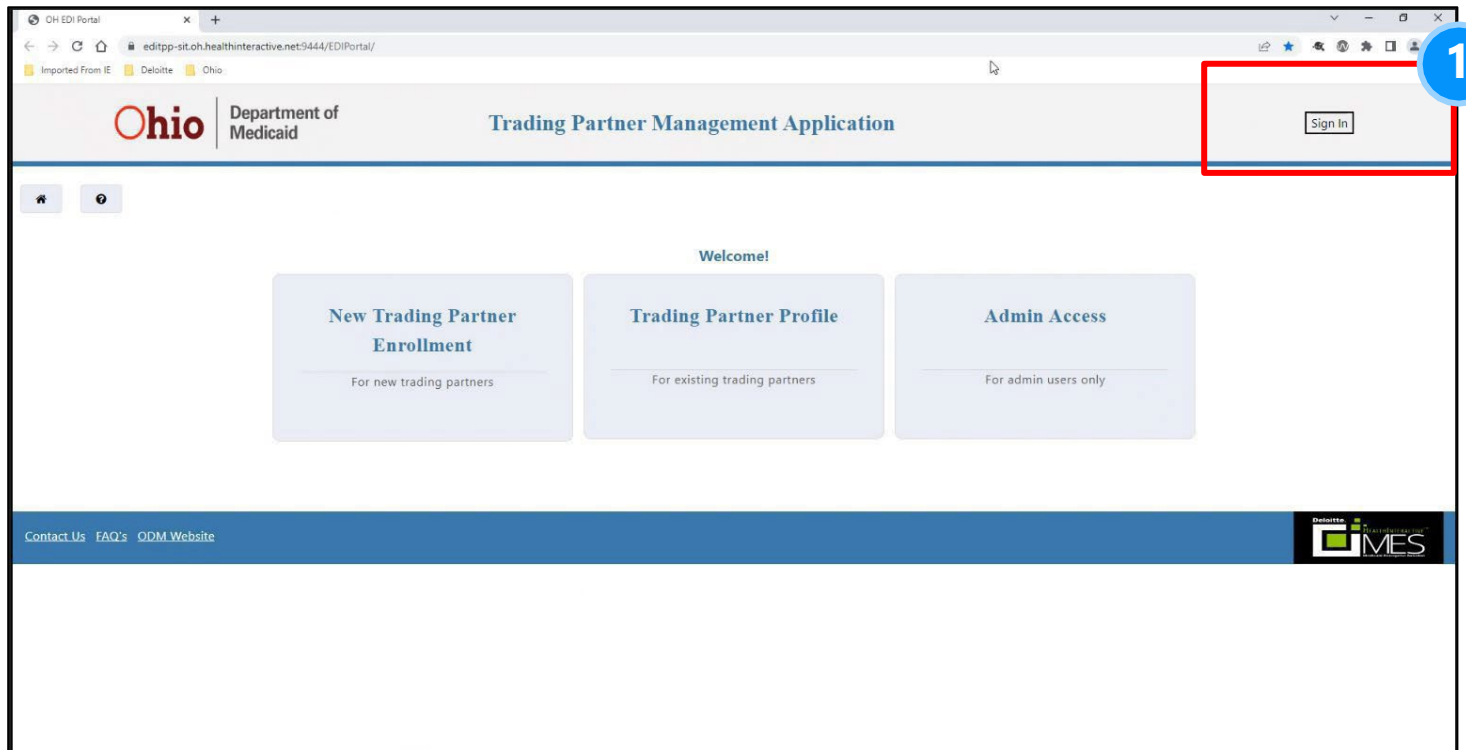
*Please note: OH|IDs are required by person and NOT by Trading Partner. Each individual associated with the Trading Partner should create their own OH|ID and register for MFA*

# Creating an OH|ID

1 Sign in to the EDI Application: <https://editpp-qa.oh.healthinteractive.net/>

Navigate to the EDI Application and select "Sign In."

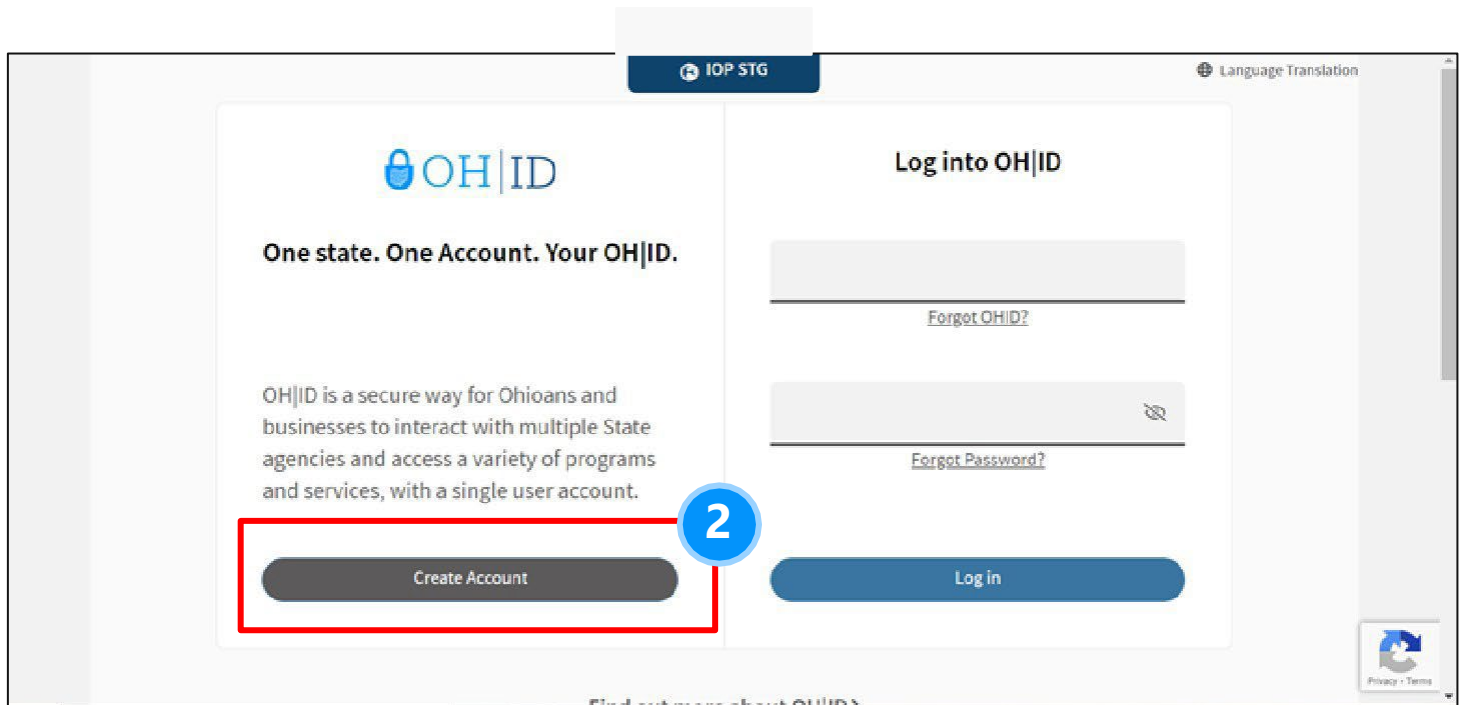
*If you already have an OH|ID, please skip to Step #11*



# Creating an OH|ID

## Select Create Account

- 2 The EDI Application will now redirect you to the OH|ID login page. From the login page, press the "Create Account" button.



# Creating an OH|ID

## Enter Email Address for Email Verification

- 3 You will need to enter your personal email address to continue creating your account. A PIN will be sent to your email address, and you will then have to enter that PIN to validate your email address.

OH|ID

### Create OH|ID Account

- 1 Email Verification
- 2 Personal Info
- 3 Pick a Username
- 4 Create Password
- 5 Account Recovery
- 6 Terms & Conditions

### Email Verification

With one OH|ID account, you can sign in to multiple State of Ohio agency systems more securely.

You need an active email address to create an OH|ID account. Need to create one? Companies such as [Google](#), [Microsoft](#), [AOL](#), and [Yahoo](#) offer free email accounts.

We need to verify the email address you want to use for your OH|ID account. A one-time PIN will be emailed to the email address you provide below.

Email Address

Confirm Email Address

Cancel

# Creating an OH|ID

## Enter PIN from Email Address

- 4 After entering your email address, you will have a PIN emailed to you. You should then enter the PIN on this screen and click "Verify."

**OH|ID**

Create OH|ID Account

- 1 Email Verification
- 2 Personal Info
- 3 Pick a Username
- 4 Create Password
- 5 Account Recovery
- 6 Terms & Conditions

### Email Verification

An email with a one-time PIN was sent to testerbmwv34@gmail.com.

Enter PIN

**Having Trouble?**

- Search your junk mail and spam folder for an email from: [DONOTREPLY-EnterpriseIdentity@ohio.gov](mailto:DONOTREPLY-EnterpriseIdentity@ohio.gov).
- Wait 10 minutes and refresh your email inbox.

**Still Having Trouble?**

Your email provider is likely marking this email as spam, which is blocking or delaying it.

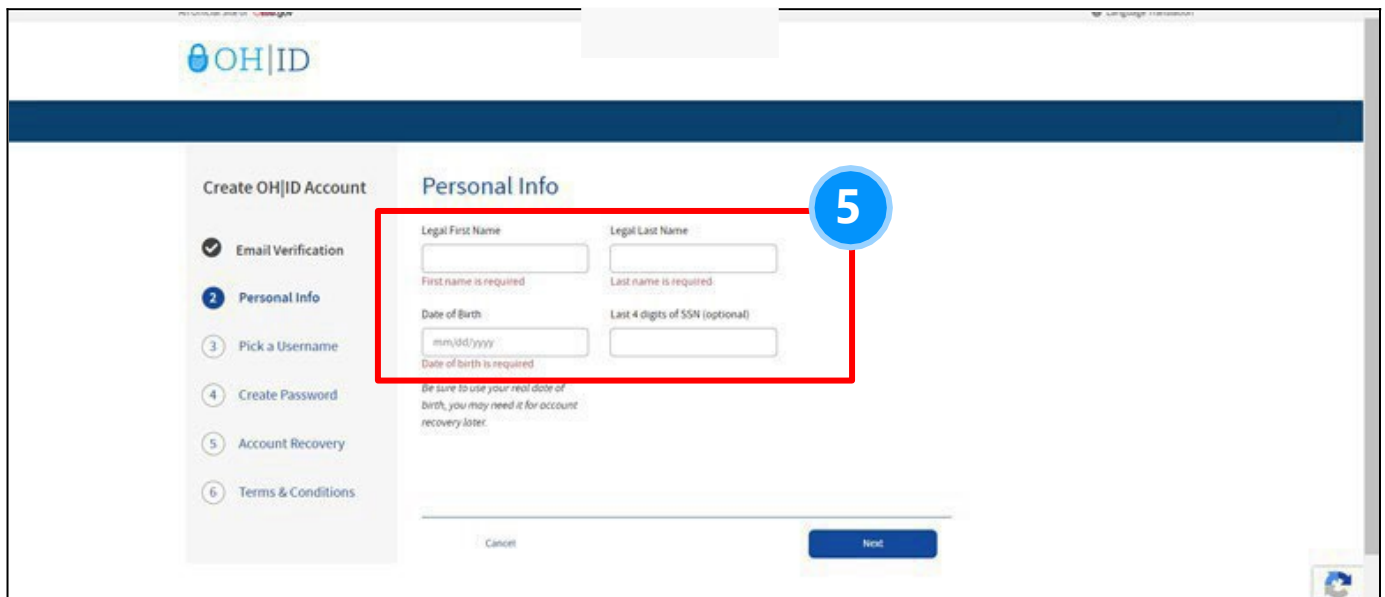
- Add [DONOTREPLY-EnterpriseIdentity@ohio.gov](mailto:DONOTREPLY-EnterpriseIdentity@ohio.gov) to your contacts.
- Ask your IT administrator to add this email to the safe-sender list.

[Send me a new PIN](#)

# Creating an OH|ID

## Input Personal Information

- 5 You will now need to enter your Legal First Name, Last Name, and Date of Birth in MM/DD/YYYY format to continue. The last 4 of your SSN is an optional field.



The screenshot shows the 'Personal Info' step of the OH|ID account creation process. A red box highlights the input fields for 'Legal First Name', 'Legal Last Name', 'Date of Birth', and 'Last 4 digits of SSN (optional)'. A blue circle with the number '5' is positioned to the right of the red box. The 'Date of Birth' field has a placeholder 'mm/dd/yyyy' and a note 'Date of birth is required'. Below the fields, there is a note: 'Be sure to use your real date of birth, you may need it for account recovery later.' At the bottom, there are 'Cancel' and 'Next' buttons.

OH|ID

Create OH|ID Account

- ✓ Email Verification
- 2 Personal Info
- 3 Pick a Username
- 4 Create Password
- 5 Account Recovery
- 6 Terms & Conditions

Personal Info

Legal First Name  
  
First name is required

Legal Last Name  
  
Last name is required

Date of Birth  
  
Date of birth is required

Last 4 digits of SSN (optional)

Be sure to use your real date of birth, you may need it for account recovery later.

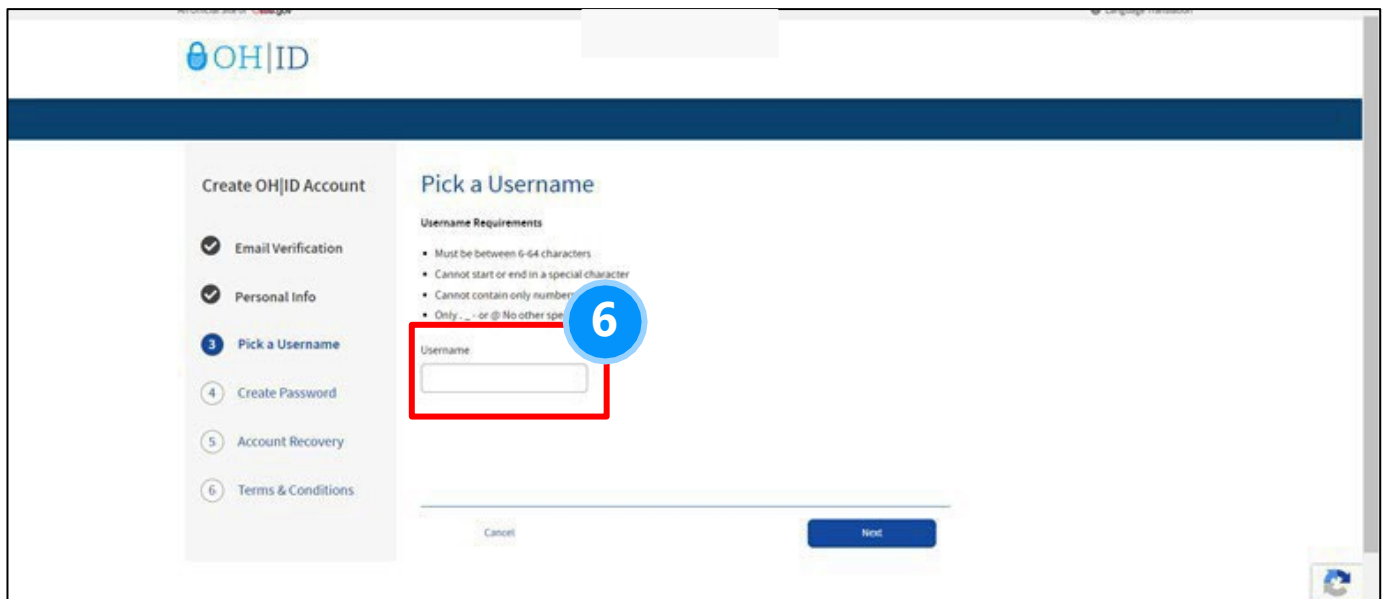
Cancel Next



# Creating an OH|ID

## Create Your Username

- 6 You will need to create a username for your OH|ID account. The username must be between 6-64 characters, cannot start or end with a special character, cannot contain only numbers, and may only contain . \_ - or @ as special characters.



The screenshot shows the OH|ID account creation interface. On the left, a sidebar lists the steps: 1. Email Verification, 2. Personal Info, 3. Pick a Username, 4. Create Password, 5. Account Recovery, and 6. Terms & Conditions. The 'Pick a Username' step is highlighted with a blue circle containing the number 6. The main content area is titled 'Pick a Username' and lists 'Username Requirements':

- Must be between 6-64 characters
- Cannot start or end in a special character
- Cannot contain only numbers
- Only . \_ - or @ No other special characters

Below the requirements is a text input field labeled 'Username', which is highlighted with a red rectangle and a blue circle containing the number 6. At the bottom of the form, there are 'Cancel' and 'Next' buttons.

# Creating an OH|ID

## Create Your Password

- 7** You must create and confirm your password here. Passwords must be between 8-30 characters; must contain at least one upper case letter, lower case letter, number, and special character; and cannot contain your first name, last name, username, or OH|ID.

The screenshot shows the 'Create Password' step in the OH|ID account creation process. On the left, a sidebar lists the steps: 1. Email Verification, 2. Personal Info, 3. Pick a Username, 4. Create Password (highlighted with a blue circle), 5. Account Recovery, and 6. Terms & Conditions. The main content area is titled 'Create Password' and includes 'Password Requirements':

- Must have at least 8 and no more than 30 characters in length
- Must contain 1 character from each of the following categories:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Special characters (!@, %&^\* \_+=~(){}|'"/:~\|'")
- Cannot include your first name, last name, username, or OH|ID
- Example: If your name or username is John Smith, your password cannot be "John" or "Smith"

Below the requirements are two input fields: 'Password' and 'Confirm Password'. A red box highlights these fields, and a blue circle with the number '7' is placed over the 'Confirm Password' field. At the bottom, there are 'Cancel' and 'Next' buttons.

# Creating an OH|ID

## Enter Mobile Number for Account Recovery

- 8 A PIN will be sent to your mobile number and you will then have to enter that PIN to validate your mobile phone.

OH|ID

Create OH|ID Account

- ✓ Email Verification
- ✓ Personal Info
- ✓ Pick a Username
- ✓ Create Password
- 5 Account Recovery
- 6 Terms & Conditions

### Account Recovery

Your email (testerbmv+34@gmail.com) is the main way you'll reset your password. Adding your mobile number to your account ensures that we have a way to reach you if you lose access to your email.

#### Set up mobile/text message account recovery

You will receive a PIN via text message. Message and data rates apply. [Terms & Conditions and Privacy Policies.](#)

Mobile Number

If you choose not to add your mobile number to your account at this time, you can [skip this step.](#)

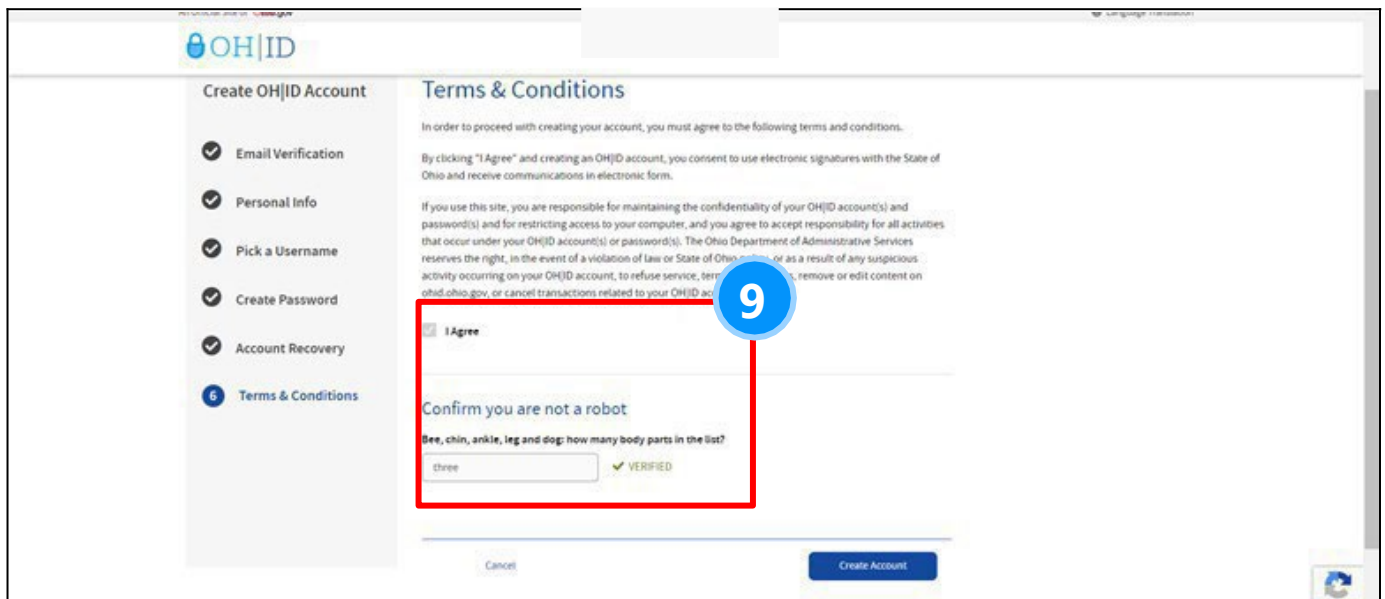
Cancel

# Creating an OH|ID

9

## Agree to the Terms and Conditions and Confirm You Are Not a Robot

You will need to check the "I Agree" box under the Terms & Conditions section and answer the "Confirm you are not a robot" question. After answering the question and checking the box, click "Verify" and then "Create Account."



The screenshot shows the OH|ID account creation interface. On the left, a sidebar lists steps: Email Verification, Personal Info, Pick a Username, Create Password, Account Recovery, and Terms & Conditions (highlighted with a blue circle and the number 9). The main content area is titled 'Terms & Conditions' and contains the following text:

In order to proceed with creating your account, you must agree to the following terms and conditions.

By clicking "I Agree" and creating an OH|ID account, you consent to use electronic signatures with the State of Ohio and receive communications in electronic form.

If you use this site, you are responsible for maintaining the confidentiality of your OH|ID account(s) and password(s) and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your OH|ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right, in the event of a violation of law or State of Ohio policy, or as a result of any suspicious activity occurring on your OH|ID account, to refuse service, terminate your account, remove or edit content on [ohid.ohio.gov](http://ohid.ohio.gov), or cancel transactions related to your OH|ID account.

I Agree

Confirm you are not a robot

See, chin, ankle, leg and dog: how many body parts in the list?

three   VERIFIED

At the bottom, there are 'Cancel' and 'Create Account' buttons. A red box highlights the 'I Agree' checkbox and the CAPTCHA section, with a blue circle containing the number 9 overlaid on it.

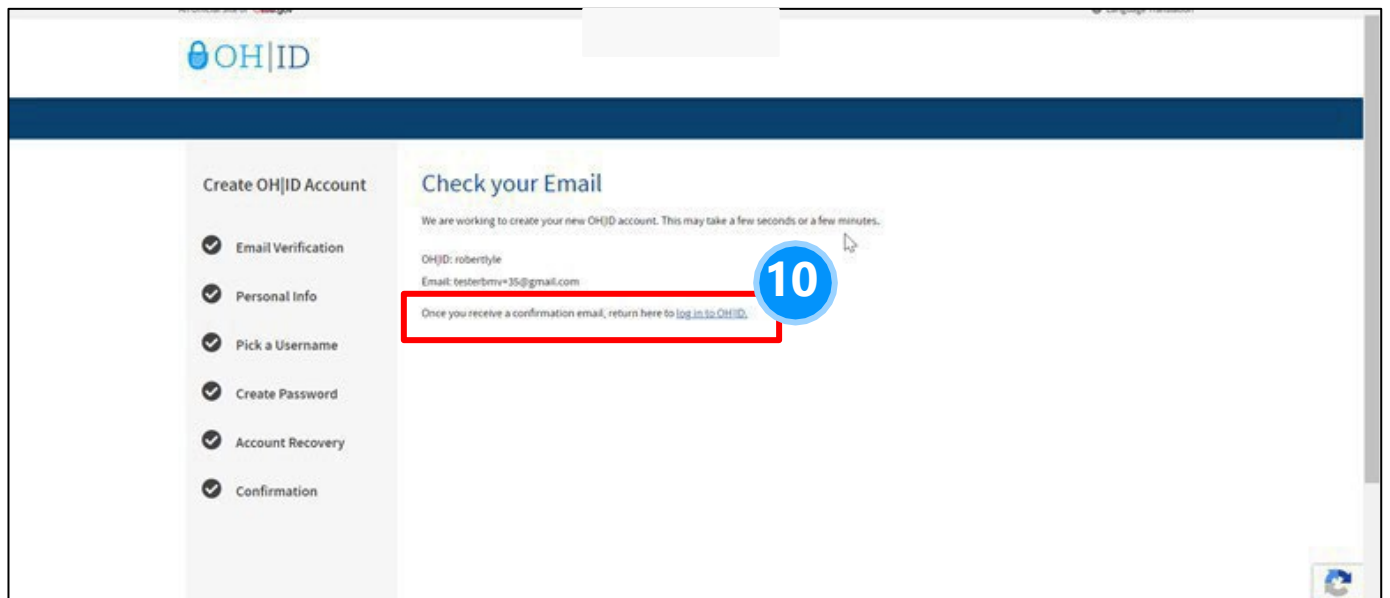
# Creating an OH|ID

## Receive an Account Creation Confirmation Email

- 10** You will receive an account creation email to the email registered to your OH|ID account. Once you have received this email, you should navigate back to this page and click the “log in to OH|ID” hyperlink.



**Note:** *You must wait until this email is received to log in*



# Creating an OH|ID

## Log in to OH|ID Account

- 11** After creating an OH|ID account, receiving the confirmation email, and clicking the “log in to OH|ID” link, you will be brought to this page to log in to your new OH|ID account using the username and password you just set up.

Once you have setup your OH|ID, please provide the information using the attached document (Trading Partner Details.xlsx) to the EDI Support Email [usomesedisupport@deloitte.com](mailto:usomesedisupport@deloitte.com)

Language Translation

**11**

**OH|ID**

One state. One Account. Your OH|ID.

OH|ID is a secure way for Ohioans and businesses to interact with multiple State agencies and access a variety of programs and services, with a single user account.

Create Account

**Log into OH|ID**

Forgot OHID?

Forgot Password?

Log in

Privacy - Terms

# Multifactor Authentication (MFA)

*Setting up MFA Enrollment for the EDI Application*

# What is MFA?

Multifactor Authentication (MFA) is a security procedure that allows Ohioans to verify that they are who they claim to be. This is done by confirming additional identifying information from a secondary source.

EDI Web Application uses an adaptive risk assessment based MFA. If the Risk levels are low, users need to provide MFA only once every 24 hours. However, for higher risk levels, MFA will be required upon each login.

The implementation of MFA for use of EDI application is important due to the nature of the private information transmitted through the application. It helps keep Ohioans and their most sensitive information secure.

## KEY TERMS AND ACRONYMS



### **Electronic Data Interchange (EDI)**

The Ohio Department of Medicaid EDI application facilitates the direct transmission of documents between business partners.



### **Single Sign-On (SSO)**

Single Sign On (SSO) refers to a sign on process which allows users to access multiple state agency resources, including EDI, through a single set of log in credentials (OHID and Password).



### **Multifactor Authentication (MFA)**

Multifactor Authentication (MFA) is a second form of verification that the user logging in is who they claim they are. There will be multiple options available, including SMS text, phone call, email, and mobile app verification.



# MFA Registration Options Overview

There are four options available for MFA Registration. Please register for at least **two** MFA options.



## SMS Text Message

An SMS text with a PIN will be sent to the user's phone number.



## Email

A PIN will be sent to the user's email associated with the OHID account.



## Phone Call

An automated call will be made to the user's phone number.



## IBM Verify App

User is given the option to authenticate through PIN displayed in app and an in-app push button option.

*Indicates recommended*

# MFA Registration Options

There are four options available for MFA Registration. Please register for at least **two** MFA options. It is recommended to choose a combination of phone-based and email options just in case you do not have multiple cell phones or lose your phone.



## SMS Text Message

An SMS text with a PIN will be sent to the user's phone number.

Level of Difficulty:

**LOW**

- The SMS verification option sends the user a one-time access code to their phone via text message.
- Users must select an active mobile phone number.
- For text message and phone call verification to be counted as separate methods, users cannot use the same phone number for both options.



## Email

A PIN will be sent to the user's email associated with the OHID account.

**LOW**

- The Email verification option sends the user an email containing a one-time verification code to the email address they used to set up MFA.
- Users should use an active email account they have access to.

# MFA Registration Options, Cont'd

*There are four options available for MFA Registration. Please register for at least **two** MFA options. It is recommended to choose a combination of phone-based and email options just in case you do not have multiple cell phones or lose your phone.*



## Phone Call

An automated call will be made to the user's phone number.

Level of  
Difficulty:

**LOW**

- The Phone Call verification option places an automated phone call to the user's phone number.
- Users must select an active phone number.
- For text message and phone call verification to be counted as separate methods, users cannot use the same phone number for both options.



## IBM Verify App

User is given the option to authenticate through PIN displayed in app and an in-app push button option.


**MEDIUM**

- The IBM Verify verification app will send a push notification when selected as the MFA option.
- The IBM Verify app is free in both the Google Play and Apple App stores.

# MFA Enrollment

After logging in to your OH|ID account, if you do not have **at least 2 MFA options enrolled**, you will be prompted to enroll in MFA. Please follow the steps outlined within for how to set up enrollment via:

- SMS Text Message
- Email
- Phone Call
- The IBM Verify App.



## Welcome to multi-factor authentication enrollment

Choose the verification method or device that you want to add.  
0 of 2 required methods set up

---

**IBM Security Verify app** [Add Device](#)  
Verify with a simple tap on your iOS or Android device with the IBM Security Verify app.

---

**Text message** [New number](#)  
The one-time access code to sent to your phone via SMS.

---

**Email** [New email](#)  
The one-time access code to sent to your email address.

---

**Phone call** [New number](#)  
One-time access code sent via phone call. Standard voice rates apply.

---

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You have no expectation of privacy in any material placed or viewed on this system except where Ohio or Federal



# MFA Enrollment: SMS Text Message

*Setting up MFA Enrollment using SMS Text Message*

**Note:** In order for text message and phone call to count as separate verification methods, you must use a different phone number for each method.

# MFA Enrollment: SMS Text Message

## Enter Your Phone Number

- 1 After selecting "New number" on the initial MFA Enrollment page, you will need to enter your phone number and press "Send me a code."



### Multi-factor authentication enrollment: Text Message

#### Enter your phone number

This phone number is used for 2-step verification. A one-time PIN will be sent to this number via text (SMS).

Please note, for Text Message (SMS) and Phone Call to count as two different methods, do not enter the same phone number for both. Losing that device would cause you to lose access to your OH|ID account.

United States +1



Phone number with area code

[Use another method](#)

[Send me a code](#)

# MFA Enrollment: SMS Text Message

## Enter Your Passcode

- 2 After selecting "Send me a code" you will receive a text message with a two-part code. Enter the portion after the hyphen into the text box on screen and press "Submit."



### One-Time Password Submission

Enter the one-time password (OTP) that is sent to +17035019190.

Time remaining: 04:53

5699- |

Submit

[Use another method](#)

[Resend OTP](#)

This system contains State of Ohio and United States government information and is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this computer system or of the data contained herein or in transit to and from this system is strictly prohibited, may be in violation of state and federal law, and may be subject to administrative action, civil and criminal penalties. Use of the system is governed by U.S. law and Ohio law and policies.

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# MFA Enrollment: SMS Text Message

## Complete Enrollment

3

If you have successfully entered the passcode, you will be met with the following screen. From here you can select "Add Additional Methods" if you need another MFA option or "Done" if you are finished enrolling. Pressing "Done" will redirect you to the EDI Application.



Enrollment successful

Phone number was added

1 of 2 required methods set up

+17035019190

You can manage your verification methods and devices from Security settings.

[Add additional methods](#)

Done

This system contains State of Ohio and United States government information and is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this computer system or of the data contained herein or in transit to and from this system is strictly prohibited, may be in violation of state and federal law, and may be subject to administrative action, civil and criminal penalties. Use of the system is governed by U.S. law and Ohio law and policies.

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# MFA Enrollment: Email

*Setting up MFA Enrollment using your Email Address*

# MFA Enrollment: Email

## Enter Your Email Address

1

After selecting "New email" on the initial MFA Enrollment page, enter your email address in the text box provided and press "Send me a code"



### Multi-factor authentication enrollment: Email

Enter your email address

This email address is used for 2-step verification. A one-time PIN will be sent to the email you enter below.

Email address

[Use another method](#)

[Send me a code](#)

1

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# MFA Enrollment: Email

## Enter Your Passcode

2 After selecting "Send me a code" you will receive an email with a two-part code. Enter the portion after the hyphen into the text box on screen and press "Submit."

**Note:** Check your spam/junk mail if there is a delay in receiving a code.



### One-Time Password Submission

Enter the one-time password (OTP) that is sent to editester2022@gmail.com.

Time remaining: 04:56

5910-

Submit

[Use another method](#)

[Resend OTP](#)

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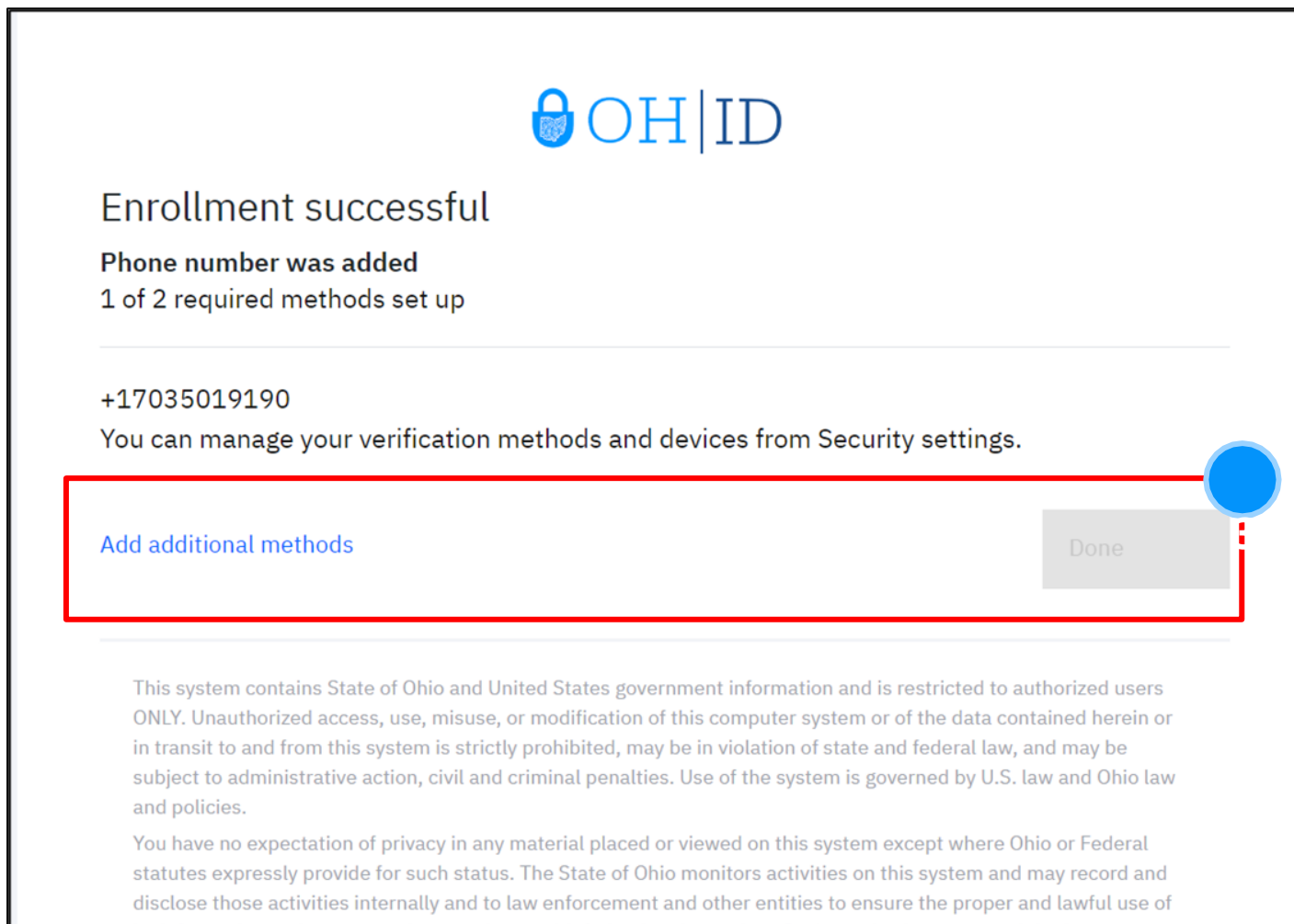
You have no expectation of privacy in any material placed or viewed on this system except where Ohio or Federal statutes expressly provide for such status. The State of Ohio monitors activities on this system and may record and disclose those activities internally and to law enforcement and other entities to ensure the proper and lawful use of its information and resources, in accordance with federal and state law. Such monitoring may result in the

# MFA Enrollment: Email

## Complete Enrollment

3

If you have successfully entered the passcode, you will be met with the following screen. From here you can select "Add Additional Methods" if you need another MFA option or "Done" if you are finished enrolling. Pressing "Done" will redirect you to the EDI Application.



# MFA Enrollment: Phone Call

*Setting up MFA Enrollment using a Phone Call*

**Note:** In order for text message and phone call to count as separate verification methods, you must use a different phone number for each method.

# MFA Enrollment: Phone Call

## Enter Your Phone Number

1

After selecting "New number" on the initial MFA Enrollment page, the user will need to enter their phone number and press "Call me."



### Multi-factor authentication enrollment: Voice Call

#### Enter your phone number

This phone number will receive a one-time voice call with an access code.

Please note, for Text Message (SMS) and Phone Call to count as two different methods, do not enter the same phone number for both. Losing that device would cause you to lose access to your OH|ID account.

United States +1



Phone number with area code

[Use another method](#)

Call me

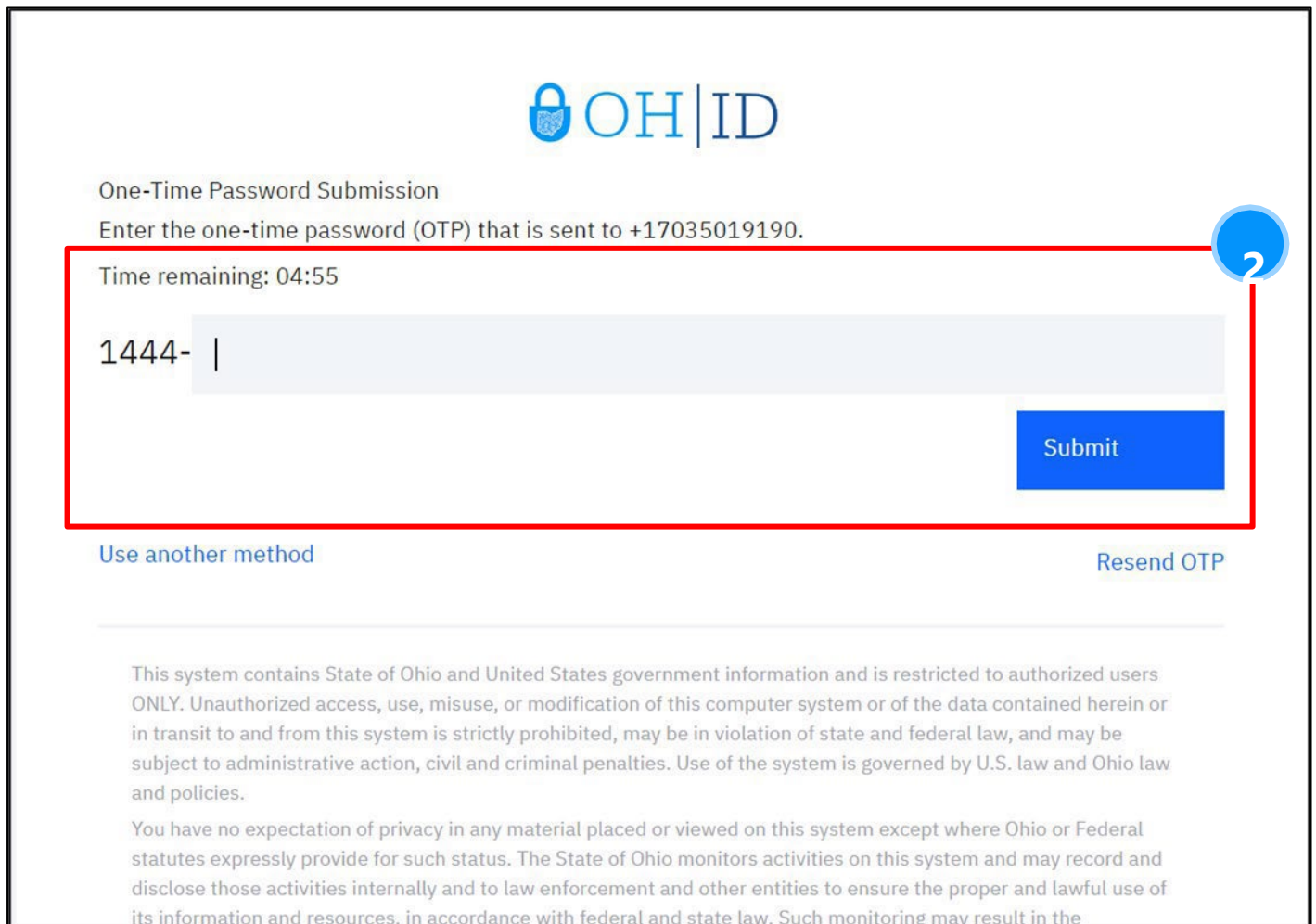



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# MFA Enrollment: Phone Call

## Enter Your Passcode

- 2 After selecting "Call me" you will receive an automated phone call with a passcode. Enter the passcode into text box on screen and press "Submit."





One-Time Password Submission

Enter the one-time password (OTP) that is sent to +17035019190.

Time remaining: 04:55

1444- |

[Submit](#)

[Use another method](#) [Resend OTP](#)

---

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# MFA Enrollment: Phone Call

## Complete Enrollment

3

If you have successfully entered the passcode, you will be met with the following screen. From here you can select "Add Additional Methods" if you need another MFA option or "Done" if you are finished enrolling. Pressing "Done" will redirect you to the EDI Application.



### Enrollment successful

**Phone number was added**

1 of 2 required methods set up

+17035019190

You can manage your verification methods and devices from Security settings.

[Add additional methods](#)

Done

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# MFA Enrollment: IBM Verify App

*Setting up MFA Enrollment Using the IBM Verify App*

# MFA Enrollment: IBM Verify App

## Download IBM Security Verify App

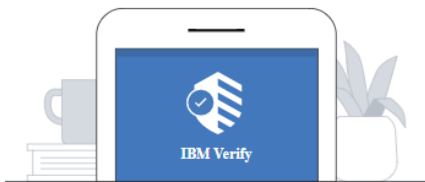
1

After selecting "Add Device" on the initial MFA enrollment page, you will download the IBM Verify App to your device and press "Connect Your Account"



### Enroll with IBM Security Verify

Download the app



Follow these instructions or if IBM Security Verify is downloaded on your device, click "Connect your account".

1. Launch the App Store (iOS) or Google Play Store (Android) app.
2. Search for "IBM Security Verify"
3. Tap "Get" and "Install" to download the app.

[Use another method](#)

Connect your account

1

# MFA Enrollment: IBM Verify App

## Verify your device

- 2 After pressing "Connect your account" you will be met with the following screen and will need to access the IBM Verify app on your device to continue with registration.



Enroll with IBM Security Verify

Connect your account



2

Next, connect the app to your account. On your mobile device:

1. Launch the authenticator app.
2. Scan the QR code by using your device's camera.
3. Finally, follow the on-screen prompts and complete the registration process.

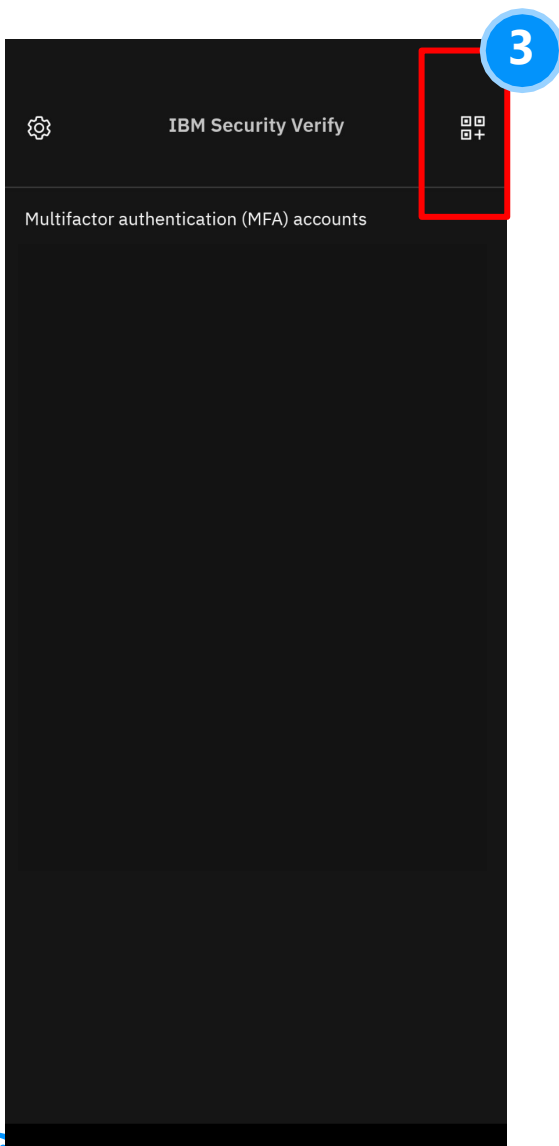
[Use another method](#)

Verify your device

# MFA Enrollment: IBM Verify App

**3** Scan the QR Code using the IBM app by opening the App's Camera.

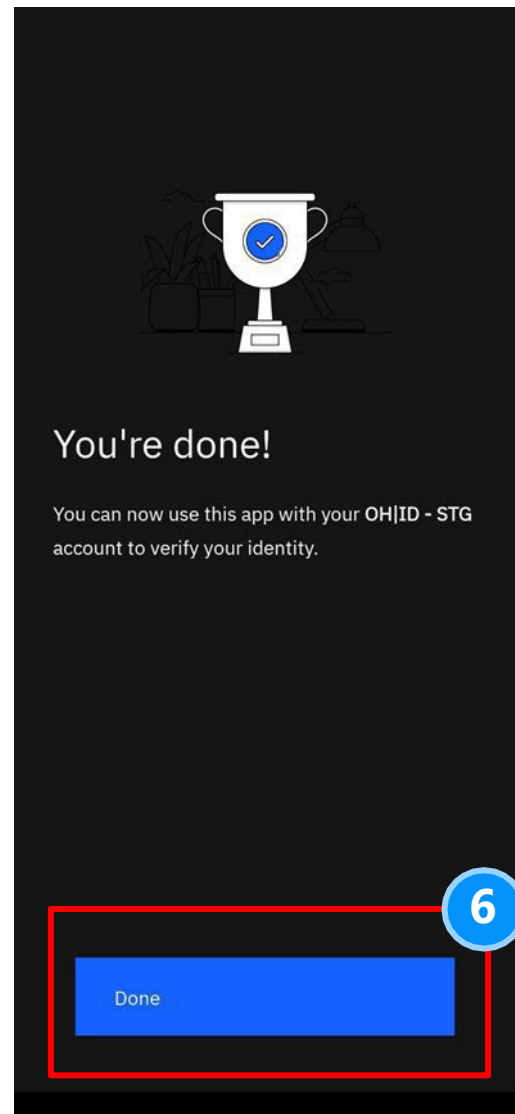
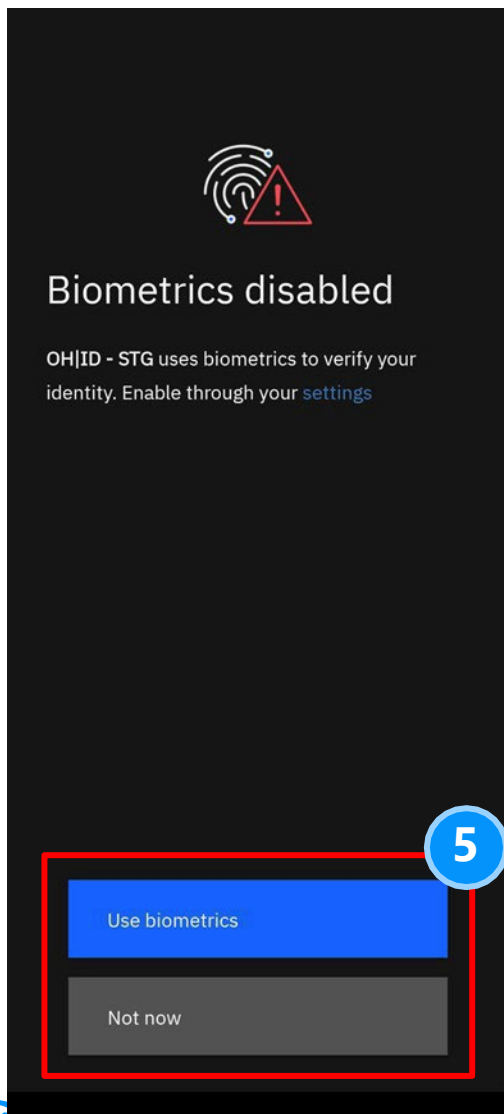
**4** Approve the connection after scanning the QR code.



# MFA Enrollment: IBM Verify App

**5** Choose Biometrics preference. This has no bearing on linking the account to MFA.

**6** Your account is now linked, press "Done"



# MFA Enrollment: IBM Verify App

## Complete device verification

7

Select "Verify your device" to continue with IBM Verify Enrollment.

Enroll with IBM Security Verify

Connect your account



Next, connect the app to your account. On your mobile device:

1. Launch the authenticator app.
2. Scan the QR code by using your device's camera.
3. Finally, follow the on-screen prompts and complete the registration process.

[Use another method](#)

Verify your device

# MFA Enrollment: IBM Verify App

## Complete Authentication Challenge

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You will now receive an “authentication challenge” to the IBM Verify app. To complete this, open the app, click the challenge, and approve the connection.

**Note:** The IBM Verify App does not allow screenshots for this step.



You have a pending authentication challenge on device Pixel 6 (Pixel 6)  
Transaction: #ef76097e

[Use another method](#)

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# MFA Enrollment: IBM Verify App

## Complete Enrollment

9

After successfully completing the authentication challenge, you will be met with the following screen. From here you can select "Add Additional Methods" if you need another MFA option or "Done" if you are finished enrolling. Pressing "Done" will redirect you to the EDI Application.



Enrollment successful

IBM Security Verify authentication was added

You can manage your verification methods and devices from Security settings.

[Add additional methods](#)

[Done](#)

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# MFA FAQs

1

**Question: My Multifactor Authentication (MFA) failed. Why did this happen?**

Answer: If the MFA method you have chosen failed, you can select from the other options available. There are 4 total options to complete MFA.

2

**Question: Do I need any additional apps to log into EDI?**

Answer: You can use the IBM Verify App to complete MFA but will still have the option for SMS Phone Call, and Email to complete MFA.

3

**Question: I have added text and phone call as my MFA options, why does the system tell me I still need a second method?**

Answer: For text message and phone call to count as separate forms of MFA you must use a different phone number for each method. If you do not have two numbers, you will need to enroll in either Email or IBM Verify as your second MFA option.

4

**Question: I am using Email for MFA and have not received a code, what do I do?**

Answer: Check your spam folder if you are not receiving the passcode directly to your inbox. If this does not work, attempt to use a separate MFA option.