



Accessing the CPC+ Dashboard

Creating an Account with Duo to Log in to the Dashboard

► PROCEDURAL GUIDE

Contents

Introduction.....	2
Setting Up Duo for Two-Factor Authentication	3
1: Access Your Computer and Authentication Device	3
2: Locate Your U-M User Account Login Information.....	3
3: Select Your Duo Authentication Method	4
4: Download the Duo Application.....	5
5: Register Your Device with the University of Michigan.....	6
Creating Your Level-2 Password.....	13
Steps	13
Changing Your Level-2 Password	14
Logging In to the Dashboard	15
Getting Help.....	17

Introduction

Michigan Data Collaborative (MDC) is a non-profit healthcare data organization at Michigan Medicine. We created the CPC+ Dashboard to provide reporting for participants of the Comprehensive Primary Care Plus (CPC+) Initiative.

This guide provides information regarding the steps that you must complete to access the CPC+ Dashboard. If you need assistance with any of these steps, you can contact the HITS Service Desk. See the section on [Getting Help](#) for contact information.

- **Creating your Level-1 password**

When your account is created, you will be sent an email which includes instructions for creating your Level-1 password. Your Level-1 password will be used to setup Duo two-factor authentication and to create your Level-2 password

- **Setting up Duo two-factor authentication**

Register a device (typically your smartphone) with the University of Michigan and download the Duo app on the device so you can receive authentication notices when you log in to the Dashboard.

[\[Read detailed instructions\]](#)

- **Creating your Level-2 password**

Create your level-2 password, which you will use each time you log in to the Dashboard.

Setting Up Duo for Two-Factor Authentication

When you set up Duo two-factor authentication, you register a device (typically your smart phone) with the University of Michigan and download the Duo app on that device to receive authentication notices.

Duo two-factor authentication provides a second layer of security to ensure that your account remains secure and to verify that the person logging in is you.

You will complete the following steps to set up Duo two-factor authentication:

- 1: [Access the computer and the mobile phone, tablet, or landline phone that you will use for login](#)
- 2: [Locate your U-M user account login information](#)
- 3: [Select your Duo authentication method](#)
- 4: [Download the Duo application on your smartphone or tablet \(if needed\)](#)
- 5: [Register your device with the University of Michigan](#)

1: Access Your Computer and Authentication Device

Access the computer you will use to log in to the CPC+ Dashboard and the mobile phone, tablet, or land line that you will have with you each time you log in.

2: Locate Your U-M User Account Login Information

- If you have requested access to the CPC+ Dashboard, you will receive an email from Identity_Management@med.umich.edu with the following:
 - UMID number
 - U-M username (uniquname)
 - Information on setting your U-M Level-1 and Level-2 passwords
- If you have **NOT** yet received your login information, please contact MDC at MDC-Accounts@med.umich.edu.
- If you have received your login information, but your password has expired or you have other password-related questions, please contact the Health Information Technology and Services (HITS) Service Desk at 734-936-8000.

3: Select Your Duo Authentication Method

Each time you log in to the Dashboard, you will get a Duo notification on a separate device to confirm that it is you who is logging in. The authentication method you select will be used each time you log in, unless you modify your selection again using the steps in this guide. The table below provides the authentication methods and brief descriptions.

Method	Description
Duo Mobile push notification	<ul style="list-style-type: none">• Requires that you install the Duo Mobile application on your smartphone or tablet.• Your smartphone or tablet must be connected to the Wi-Fi or to your cellular service. <p>How it works When you log in to the Dashboard, you will receive a notification on your registered smartphone or tablet (via the Duo Mobile app) to accept the login request. You must accept the request to continue the login process.</p>
Phone call to either mobile phone or landline	<p>Select this method if you do not have a smart phone or a data service, or if you do not want to use your personal phone.</p> <p>How it works When you log in to the Dashboard, you will receive a phone call at the phone number you registered. You will accept the request by pressing “1” to continue the login process.</p> <p>Notes:</p> <ul style="list-style-type: none">• If you select this method, you do not need to download the Duo App. Skip to Register Your Device with the University of Michigan in this guide.• If you select this method, you need to call the HITS Service Desk after you register your device (Step 5). For more information, see Important Information for Using Phone Call Authentication.

4: Download the Duo Application

If you are using your smartphone or tablet to receive [Duo Mobile](#) push notifications, complete the steps in this section to download the Duo application.

If you want to receive a phone call for authentication, you do not need to complete these steps. Go to [Register Your Device with the University of Michigan](#).

NOTES:

- Duo Mobile is a free application.
- Duo Mobile requires approximately 32 MB of internal storage on an Android device and less than 10 MB on an iPhone.
- Duo Mobile requires notification access and camera access on your device. The camera access is only used to scan a code as part of the activation process.

STEPS FOR IPHONE OR IPAD

1. On your iPhone or iPad, launch the App Store.
NOTE: Duo is available only for iOS versions 7 and higher.
2. Search for "Duo Mobile."
3. Tap **Get** and then **Install** to download the app.

STEPS FOR ANDROID SMARTPHONE OR TABLET

1. On your Android smartphone or tablet, launch the Google Play Store app.
NOTES:
 - Duo is available only for Android OS versions 4 and higher.
 - If you are prompted to add a credit card number, you can dismiss this request.
2. Search for "Duo Mobile."
3. Tap **Install** to install the app.

STEPS FOR WINDOWS PHONE

1. Search for "Duo Mobile" in the Windows Store.
2. Tap **Install** to install the app.

STEPS FOR BLACKBERRY PHONE

1. Search for "Duo Mobile" in BlackBerry World.
2. Tap **Download** to install the app.

Accessing the CPC+ Dashboard

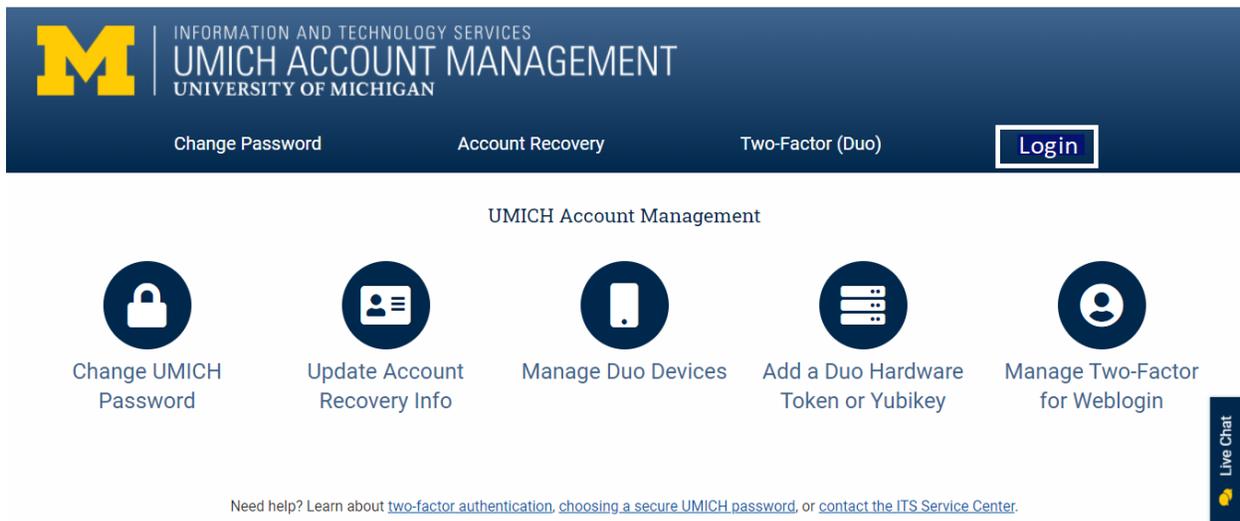
▷ PROCEDURAL GUIDE

5: Register Your Device with the University of Michigan

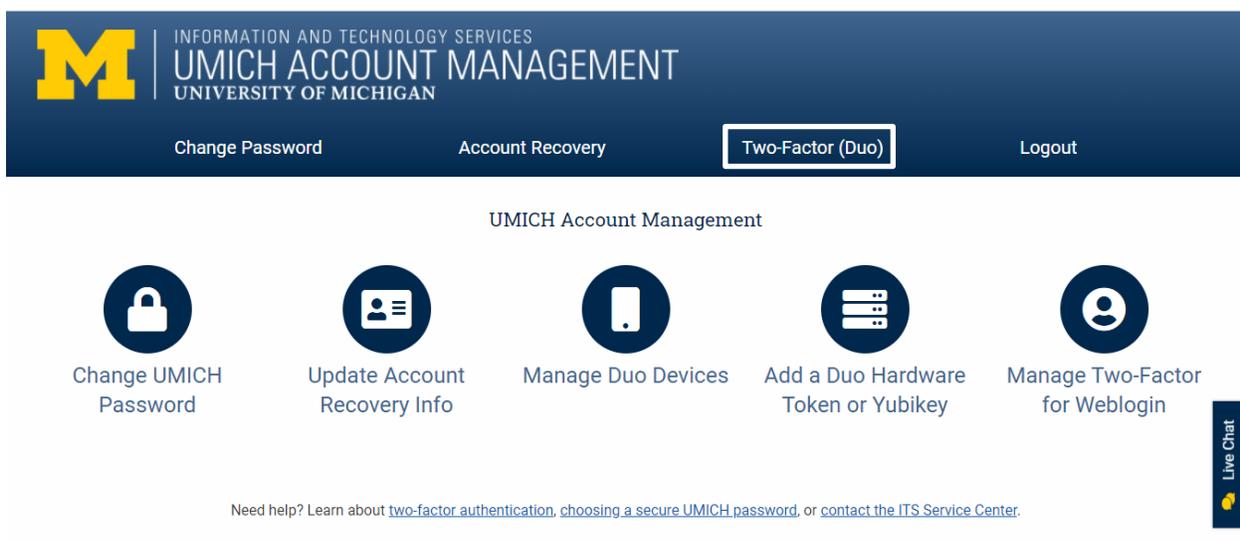
Regardless of the authentication method you select, you need to register the device (mobile phone, tablet, or landline) with the University of Michigan to receive your authentication notices. The steps in this section will guide you through the registration process.

From your computer, complete the following steps:

1. Navigate to the following site: <https://password.it.umich.edu/pwm/public/>.
2. Click **Login** in the upper-right corner. The screen will look similar to this:



3. Enter your U-M username and Level-1 password.
4. Select the **Two-Factor (Duo)** tab.

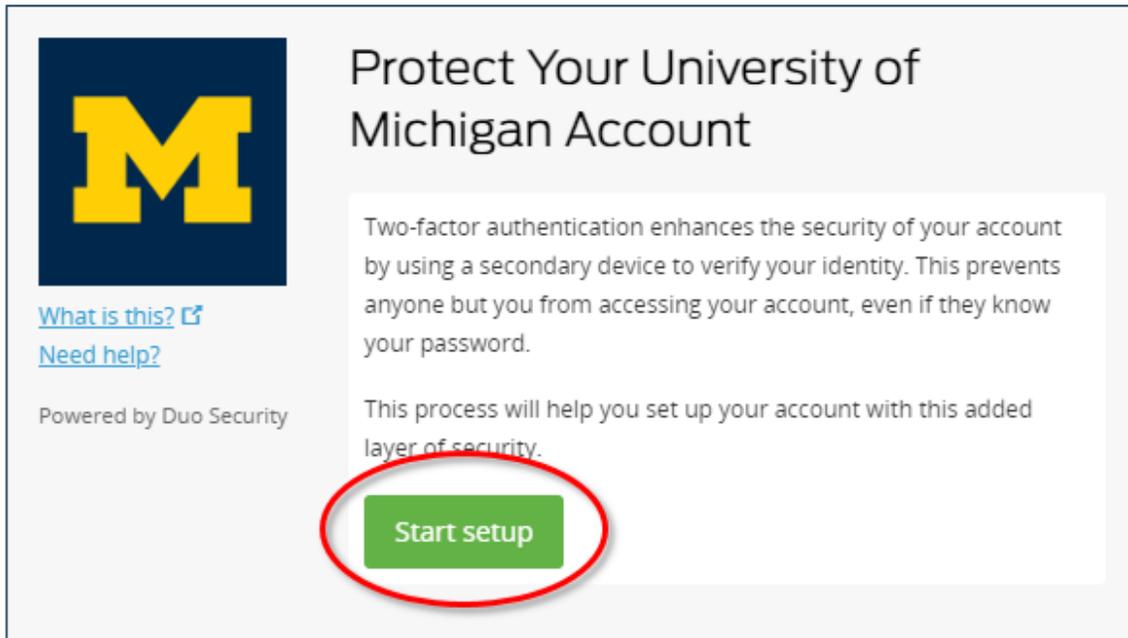


5. Click **Manage Duo Devices**.

Accessing the CPC+ Dashboard

▷PROCEDURAL GUIDE

6. Click **+Add another device**.



7. If you want to send a push notification to your mobile phone or tablet, go to [Adding a Mobile Phone or Tablet](#).

If you want to receive a phone call on your landline or mobile phone, go to [Adding a Phone Call](#).

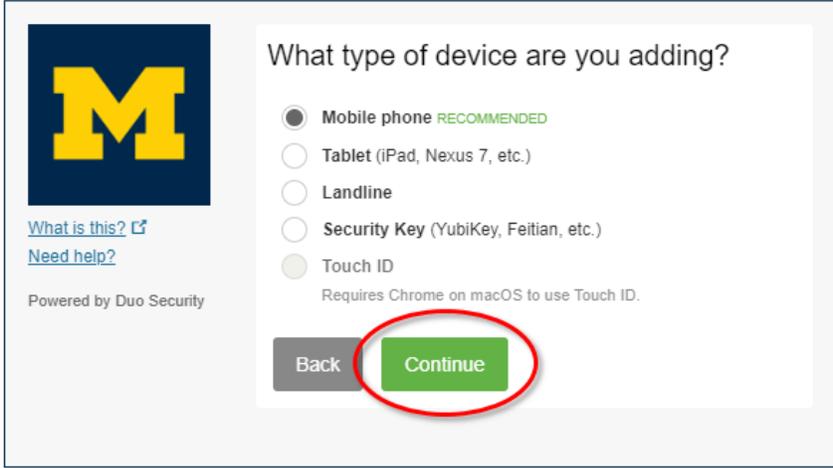
Accessing the CPC+ Dashboard

▷ PROCEDURAL GUIDE

ADDING A MOBILE PHONE OR TABLET

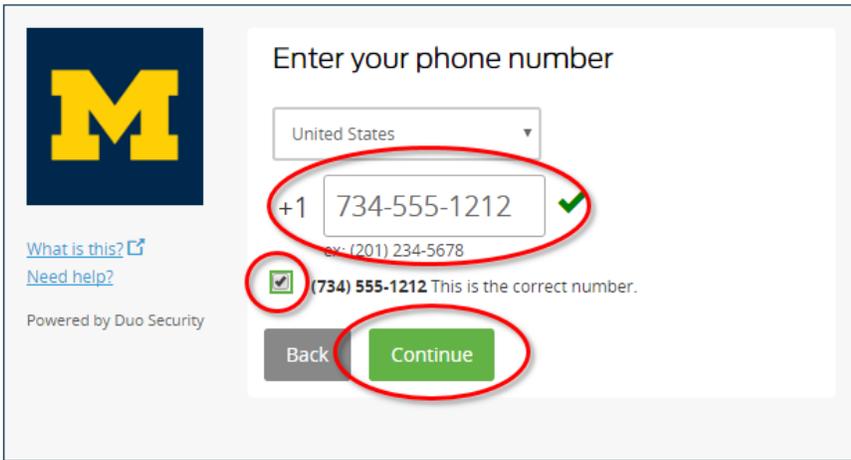
Complete these steps if you want to receive a Duo push notification on your mobile phone or tablet.

1. Select one of the following options to enroll your device, and then click **Continue**.
 - Mobile phone
 - Tablet



The screenshot shows a web interface with a large yellow 'M' logo on a dark blue background. Below the logo are links for 'What is this?' and 'Need help?'. The main heading is 'What type of device are you adding?'. There are five radio button options: 'Mobile phone RECOMMENDED' (selected), 'Tablet (iPad, Nexus 7, etc.)', 'Landline', 'Security Key (YubiKey, Feitian, etc.)', and 'Touch ID' (with a note: 'Requires Chrome on macOS to use Touch ID.'). At the bottom are 'Back' and 'Continue' buttons. The 'Continue' button is circled in red.

2. Enter your device's phone number.
NOTE: The phone number steps will automatically skip for tablet users.
3. Click the checkbox to verify the number, and then click **Continue**.

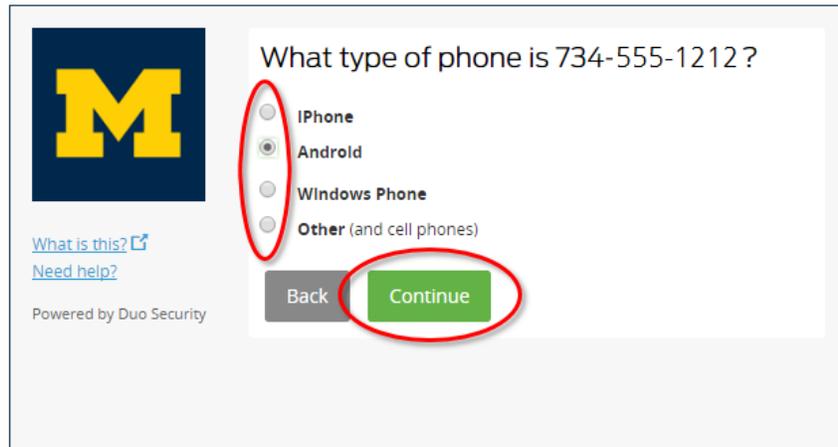


The screenshot shows a web interface with the same 'M' logo. The heading is 'Enter your phone number'. There is a dropdown menu for 'United States'. Below it is a text input field containing '+1 734-555-1212' with a green checkmark to its right. Below the input field is a checkbox that is checked, with the text '(734) 555-1212 This is the correct number.' next to it. At the bottom are 'Back' and 'Continue' buttons. The input field, the checked checkbox, and the 'Continue' button are all circled in red.

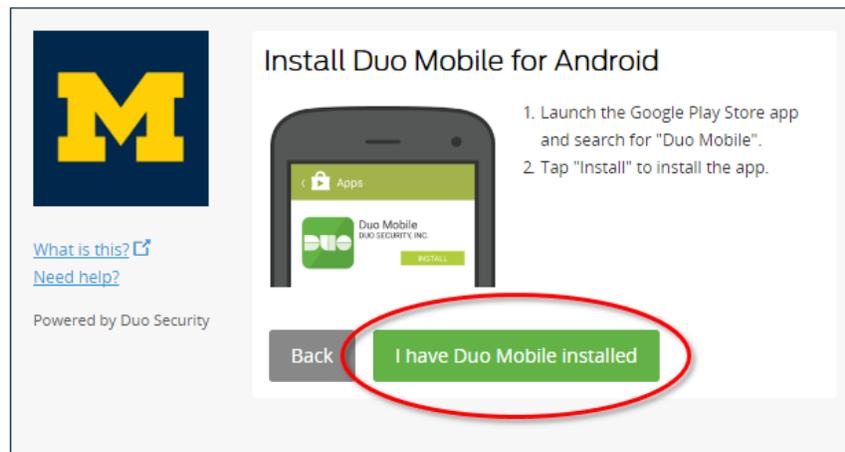
Accessing the CPC+ Dashboard

▷ PROCEDURAL GUIDE

4. Select your device's operating system, and then click **Continue**.



5. Click **I have Duo Mobile installed**.

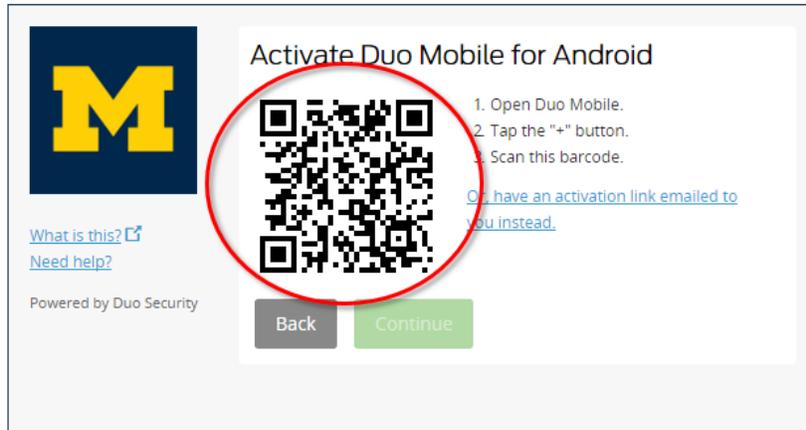


6. Open the Duo Mobile app on your device.
7. Verify your device's phone number if prompted by the Duo Mobile app.

Accessing the CPC+ Dashboard

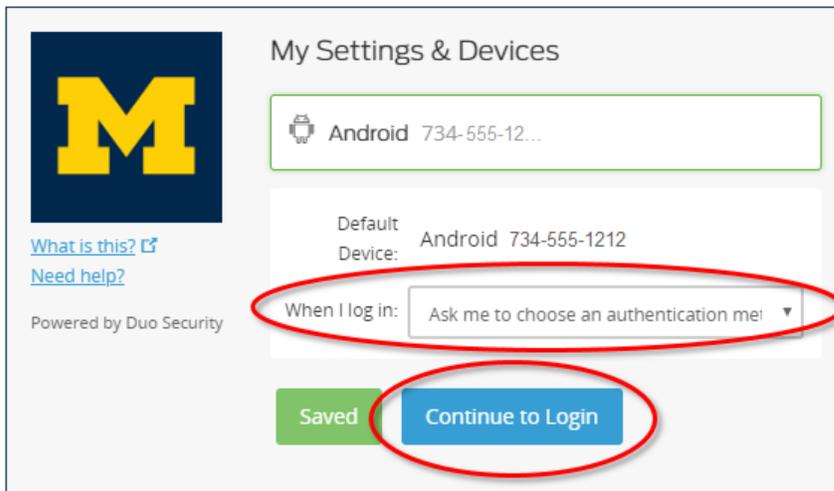
▷ PROCEDURAL GUIDE

8. Use the Duo Mobile app's built-in barcode scanner to scan the barcode on screen, and then click **Continue**.



NOTE: If you have a Blackberry OS smartphone, you will not use a barcode scanner. Instead, enter your email address as prompted on the screen and click **Send Email**. On your phone, open the email message and click the activation link.

9. In the **When I log in** field, click the dropdown arrow and select **Automatically send this device a Duo Push**.



10. Complete a two-factor authentication method (**Send Me a Push**, **Call Me**, or **Enter a Passcode**) MDC recommends selecting **Send Me a Push** for ease of use.

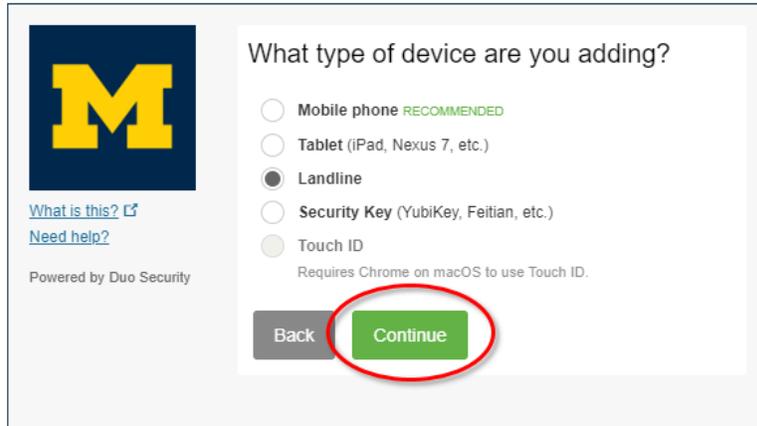
Accessing the CPC+ Dashboard

▷ PROCEDURAL GUIDE

ADDING A PHONE CALL

Complete these steps if you want to receive a phone call notification on your landline or mobile phone.

1. For **What type of device are you adding?**, select **Landline**, and then click **Continue**.



What type of device are you adding?

Mobile phone **RECOMMENDED**

Tablet (iPad, Nexus 7, etc.)

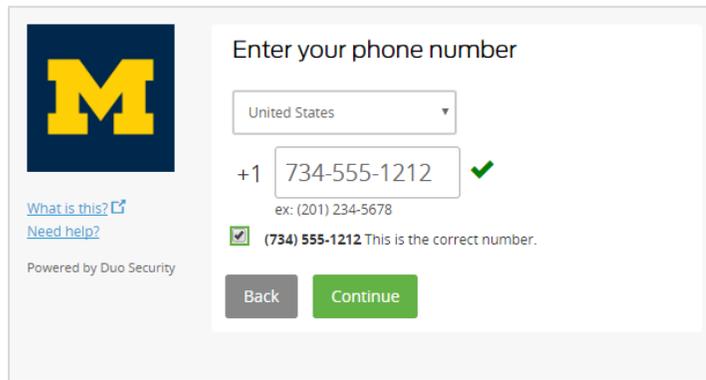
Landline

Security Key (YubiKey, Feitian, etc.)

Touch ID
Requires Chrome on macOS to use Touch ID.

Back Continue

2. Enter your phone number.
3. If you selected **Landline** you will have the option to enter an extension.
4. Click the checkbox to verify the number, and then click **Continue**.



Enter your phone number

United States

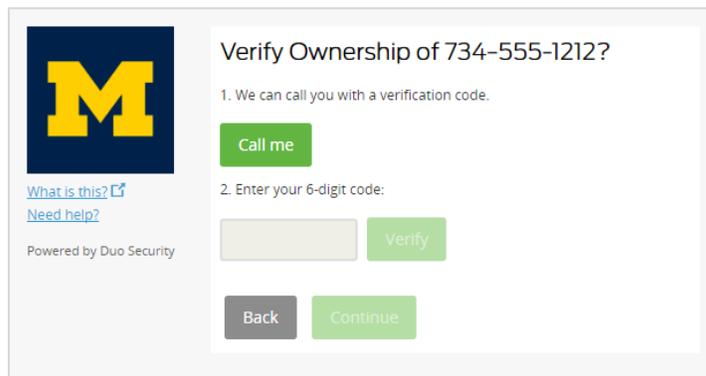
+1 734-555-1212 ✓

ex: (201) 234-5678

(734) 555-1212 This is the correct number.

Back Continue

5. To verify ownership, click **Call Me**.



Verify Ownership of 734-555-1212?

1. We can call you with a verification code.

Call me

2. Enter your 6-digit code:

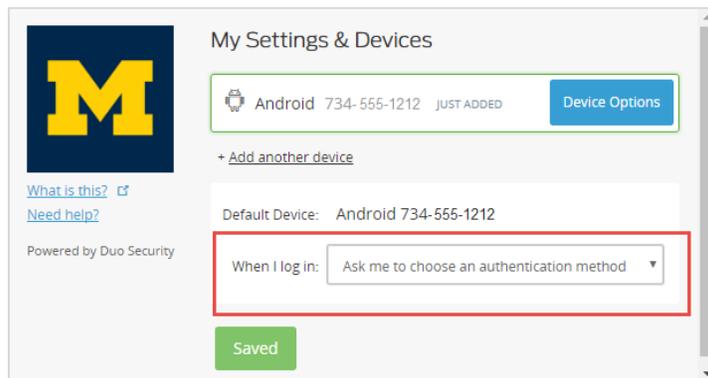
Verify

Back Continue

Accessing the CPC+ Dashboard

▷ PROCEDURAL GUIDE

6. Duo will automatically call the number and provide a 6-digit code.
7. Enter the 6-digit code, and then click Continue.
8. If you selected the **Mobile phone** option, select **Other (and cell phones)** then click Continue.
9. In the **When I log in** field, click the dropdown arrow and select **Automatically call this device**.



IMPORTANT INFORMATION FOR USING PHONE CALL AUTHENTICATION

If you are using the phone call authentication method, you need to call the HITS Service Desk for assistance with changing your Michigan Medicine Global Default Override. To do so, complete the following steps:

1. Call the HITS Service Desk at 734-936-8000.
2. Inform them of the following:
 - You are a non-Michigan Medicine employee who has an account sponsored by Michigan Data Collaborative and need to access hosted applications from outside the Michigan Medicine network.
 - You are signed up for Duo and using phone-call authentication.
 - You are locked out of your Profile page and need help changing your Michigan Medicine Global Default Override.
3. The help desk support person will walk you through the rest of the process and help you verify that your Duo authentication is functional.

Creating Your Level-2 Password

Your Level-2 password is required to access the CPC+ Dashboard. When your Dashboard account is approved, MDC will send you an email containing your UM username and directions to set your Level-1 password. You will need both to create your Level-2 password. You also need to set up [Duo two-factor authentication](#) prior to completing these steps.

Steps

Complete the following steps to create your Level-2 Password:

1. Click the following link: <https://lvl2.med.umich.edu/>.
2. Click the **Click here if your account is locked or if you've forgotten your Level-2 password** link.



3. In the **username** field, enter your *UM username*, and then click **Next**.
4. Enter the *month* and *day* of your birth date.
5. Enter your *UMID number* (found in the original email you received from us), and then click **Next**.
6. Click the dropdown and select the delivery method (phone or email) to receive your security key.
7. Follow the instructions to create your Level-2 password.
8. Re-enter your Level-2 password to confirm.
9. Enter the security key that you receive, and then click **Next**.
10. After your password is set, you will receive a confirmation message.

Changing Your Level-2 Password

You are required to change your Level-2 password on a yearly basis. Because the Michigan Medicine automated messaging system will only send reminder notices to internal (@umich) email addresses, MDC recommends that you set a reminder to proactively update your password each year. If your Level-2 password expires, you will receive an error message when you try to log in.

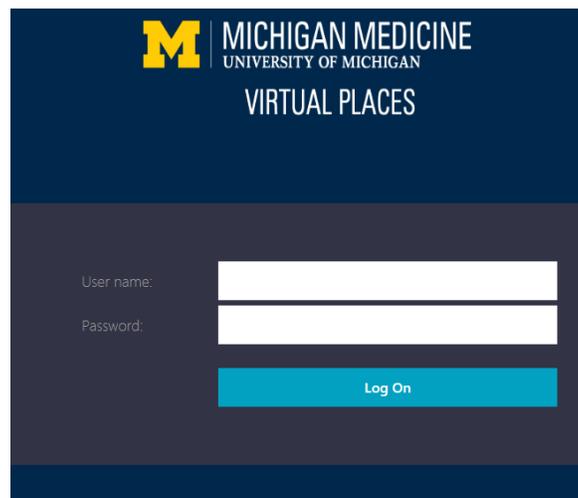
You can find the instructions to change your passwords on the [CPC+ Passwords](#) page of the MDC Website.

Logging In to the Dashboard

You will securely access the Dashboard through Michigan Medicine Virtual Places.

1. Open the [MDC Website](#).
2. Click the **Login** button in the upper-right corner.

A window similar to the following displays:



The screenshot shows a login interface for Michigan Medicine Virtual Places. At the top, there is a dark blue header with the Michigan Medicine logo (a yellow 'M') and the text 'MICHIGAN MEDICINE UNIVERSITY OF MICHIGAN VIRTUAL PLACES'. Below the header, there is a dark grey background with two white input fields. The first field is labeled 'User name:' and the second is labeled 'Password:'. Below the password field is a blue button with the text 'Log On'.

3. Log in to Virtual Places.
 - **User Name:** Type the username portion of your Michigan Medicine login.
 - **Level-2 Password:** Type your Michigan Medicine Level-2 password.
 - **Duo Two-Factor:** Use the drop-down menu in this field to select one of the following options.

NOTE: This method should be the same default method you selected when you set up Duo. (If you have not yet set up Duo, follow the instructions in the [Setting Up Duo for Two-Factor Authentication section](#).)

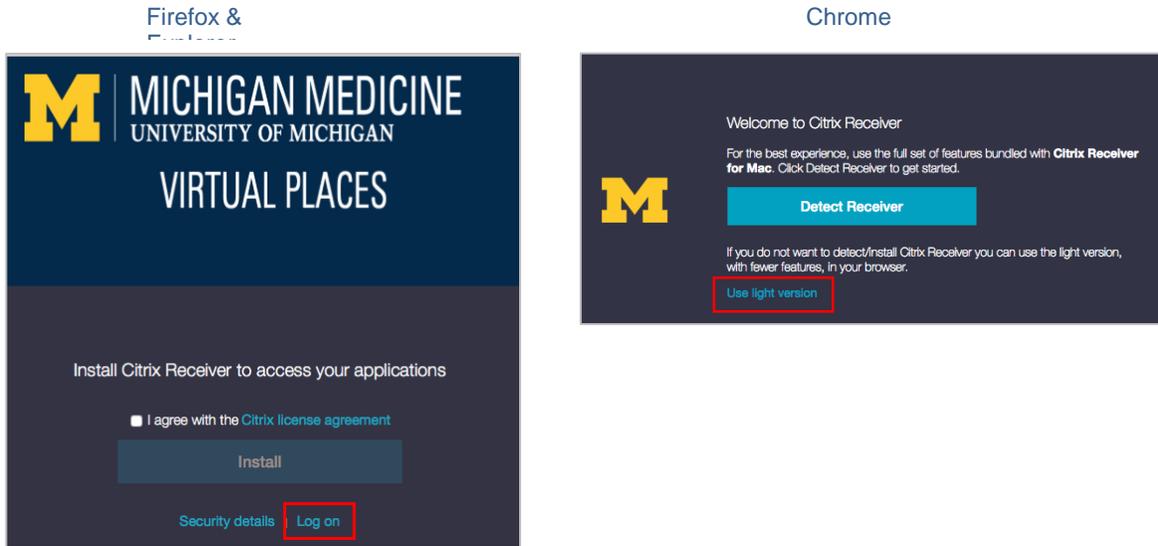
 - Select **PUSH** to receive a notification alert on the device you previously registered when you set up Duo (for example, your personal cell phone).
 - Select **PHONE** to receive a call on the phone you previously registered when you set up Duo (for example, to your personal cell phone). Answer the call and follow the instructions you are given to confirm the phone alert.
4. Click **Log On**.

Accessing the CPC+ Dashboard

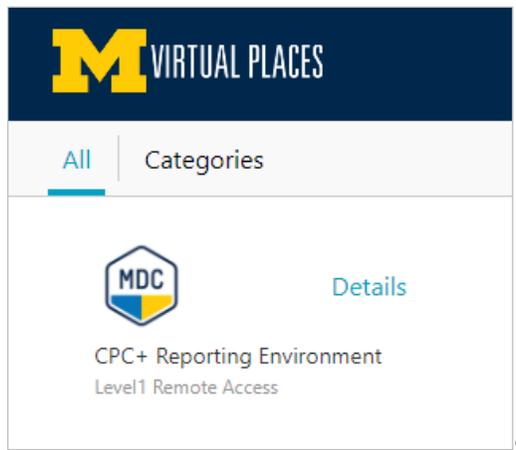
▷ PROCEDURAL GUIDE

5. Accept the Duo two-factor authentication request.

A window similar to one of the following displays (depending on your browser):



6. Depending on your browser, click **Log on** or **Use light version**.
7. Click the **CPC+ Reporting Environment** icon. (It may take a minute or two for the Dashboard to open.)



8. The CPC+ Attestation pops up in a new window. Click **I agree**.
NOTE: When you access the CPC+ Dashboard, you are accessing a virtual PC behind the Michigan Medicine firewall. Regardless of which browser you are using on your own PC, the virtual PC will open the CPC+ Dashboard in Internet Explorer.
9. View and navigate the data on the CPC+ Dashboard.

Getting Help

Use the resources listed here if you need assistance with your CPC+ Dashboard setup steps.

Duo, Password, or Citrix Help

If you need Duo two-factor authentication assistance, password assistance, or Citrix assistance, contact the Health Information Technology and Services (HITS) Service Desk.

Phone: 734-936-8000

NOTES:

When you call the HITS Service Desk, please give them the following information, as applicable:

- If possible, access your U-M ID, U-M username, and your Level-1 and Level-2 passwords
- Inform the service desk employee that you are a user of the Michigan Data Collaborative's User Portal. You are not a U-M employee; however, you have a U-M ID and username (also known as a nickname) in order to access the CPC+ Dashboard.

General Account Information

- If you have any general questions about accessing the CPC+ Dashboard, contact MDC at MichiganDataCollaborative@med.umich.edu.

Additional Documentation

- [Duo Two-Factor Authentication](#)