Gateway Forum Meeting Responses – Appendix

Meeting Date: August 27, 2018

Image 1: Referenced in Discussion Topic 1

Where can I find detailed transaction receipts and view transaction history?

Detailed transaction receipts and a business account's transaction history can be viewed by navigating to the **History** tab on the Business Dashboard. However, to view a business account's converted history from the previous Gateway, click on the "Click to see more history" button near the bottom of the **History** tab. The previous transaction history for the business account will then appear.

Image 2: Referenced in Discussion Topic 3

Service Providers

Why should Service Providers and clients create separate OH|ID login credentials?

With the Gateway's integration with the State of Ohio's new identity management system, OH|ID, each Gateway user is now required to create an OH|ID that represents them as an individual. This is a change from the previous system — ***OH|IDs are associated with an individual user, not a company or business account***. In other words, OH|IDs are "user-based" not "business-based."

This change aligns with the latest in security best practices and allows for verification of and tracking that the individual who is filing a transaction has the appropriate permissions to file on behalf of the business account. Never share your OH|ID username or password as the credentials represent you as an individual practitioner; they do not represent your employer's or client's business account. Logging in with an OH|ID created by a client means that the Gateway will record that your client, not you, filed the transaction and poses a security risk both for your client and yourself.

Image 3a: Referenced in Discussion Topic 5

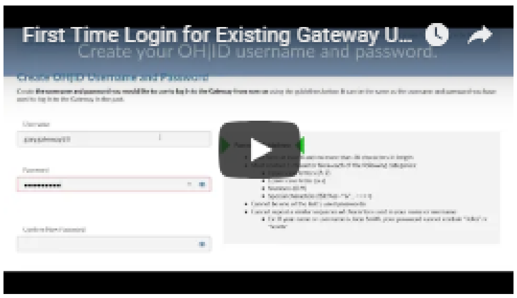
Service Providers

Why should Service Providers and clients create separate OH|ID login credentials?

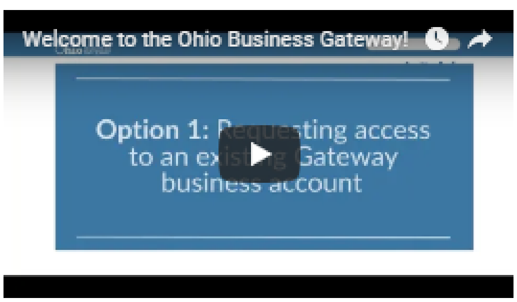
If I am a Service Provider, how do I assist a client who does not have access to their own business account?

The appropriate representative(s) from your client's business should first create an OH|ID that represents them as an individual.

If your client logged in to the Gateway before July 2nd with their own username and password but has not logged in since the modernized Gateway has gone live, share the video tutorial below, which provides step-by-step instructions for how to create an OH|ID and link it to their existing Gateway account.



If your client has never logged in to the Gateway before, they should follow the step-by-step instructions in the video tutorial below to create an individual OH|ID and request access to their business' Gateway account.



If, after logging in with their individual OH|ID, your client does not see their business listed in the dropdown menu located at the top left-hand corner of the **Business Dashboard**, they must request access by clicking the "Request Business Access" hyperlink. A Filing Administrator on the business account is then responsible for approving their access request, as well as determining the filing role they should have on the business account and their transaction permissions. The video tutorial below provides additional details on how users complete this process. Additional information can also be found within the Gateway by typing keywords into the Gateway's "Search" bar.

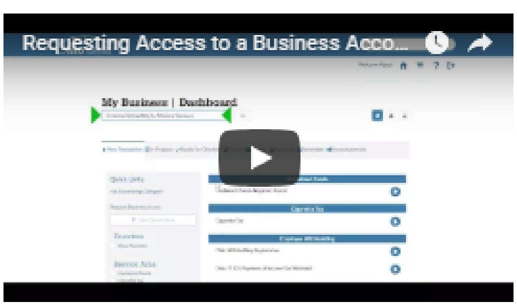


Image 3b: Referenced in Discussion Topic 5

Account Management

How do I add Service Areas or transactions to a business account?

How do other users gain access to my or my client's business account?

With the Gateway's integration with the State of Ohio's new identity management system, OH|ID, each Gateway user is now required to create an OH|ID that represents them as an individual. After logging in to the Gateway with their individual OH|ID username and password, a user requests access to a business account by clicking the "Request Business Access" hyperlink on the left-hand side of the **Business Dashboard**. The business account's Filing Administrator is then responsible for approving that user's access request, as well as determining the filing role they should have on the business account and their transaction permissions.

The video tutorial below provides additional details on how users complete this process. Additional information can also be found within the Gateway by typing keywords into the Gateway's "Search" bar.

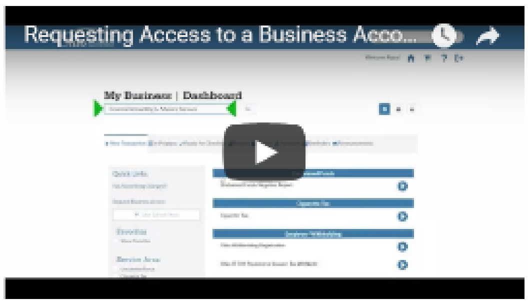


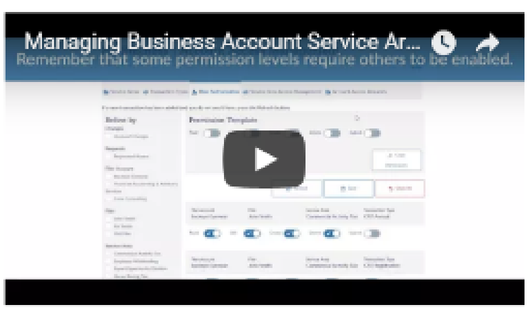
Image 3c: Referenced in Discussion Topic 5

Account Management

How do I add Service Areas or transactions to a business account?

The process for adding Service Areas and transactions has changed in the modernized Gateway. Now, Filing Administrators must visit the **Account Access Management** page (by clicking on the "lock" icon in the Gateway) and move the appropriate Service Areas from the *Available Service Areas* column to the *Authorized Service Areas* column in the Service Areas tab. Then, Filing Administrators navigate to the **Transaction Types** tab and perform the same action for the appropriate transactions. The final step is navigating to the **User Authorization** tab to set the correct permissions for users to access the newly added transactions.

Watch the video tutorial below for step-by-step instructions on how to complete this process.



Additional information can also be found within the Gateway by typing keywords into the "Search" bar.

Image 4: Referenced in Discussion Topic 14

Where can I find detailed transaction receipts and view transaction history?

Detailed transaction receipts and a business account's transaction history can be viewed by navigating to the **History** tab on the Business Dashboard. However, to view a business account's converted history from the previous Gateway, click on the "Click to see more history" button near the bottom of the **History** tab. The previous transaction history for the business account will then appear.