

Setting Up Single Sign-On with OKTA For CPAS

Setting up single sign-on for CPAS should be a straightforward and intuitive process. However, feel free to give CPAS Support a call if you run into any issues at 888-839-1252.

If you have a my.castandcrew.com account linked to the same email used to log into CPAS you will be prompted to log in using the my.castandcrew.com credentials.

There are three Single Sign-on options to choose from:

1. Text Message:

You will receive a text message with a number to enter in the login window. A mobile phone is required to use this option.

2. Voice Call:

You will receive an automated phone call with a number to enter in the login window. This can be used on both mobile and traditional landline phones.

3. Okta Verify App for iPhone, Android, or Windows:

After installing the OKTA Verify app on your mobile device, you will be prompted to confirm your login on your mobile device.

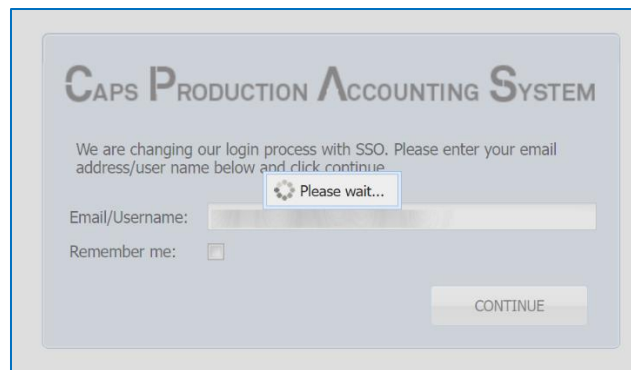
During the first log in and initial setup you will be prompted to enter the phone number you would like to be linked to your login. Setting up a **Text Message** or **Voice Call** to verify your phone number is required. **Once phone number verification is complete, you will have the option to select Okta Verify, if you would prefer to log in with the Okta Verify app for iOS or Android.**

As a note, many of the screens in this setup process will refer to MyCast&Crew, but please contact CPAS Support at 888-839-1252 if your need assistance.

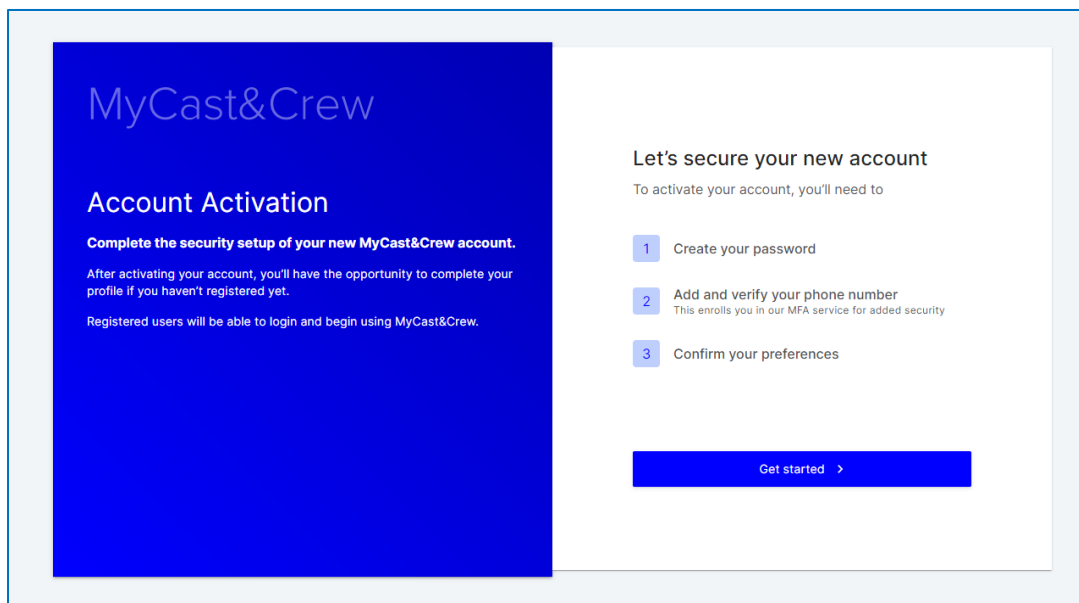
Setting Up Text Message or Voice Call

1. When you attempt to log into CPAS you will be forwarded to my.castandcrew.com to create an account.
 - a. An activation email will also be sent to the email on file email with an Activate my account link at the bottom.

IMPORTANT NOTE: Users with access to multiple CPAS databases will see a “Please wait” loading window. This means CPAS is initializing your Okta login on every database and this window may stay on the screen for 5 to 10 minutes without any sign of progress before completing and moving to the next page. This delay will only happen on the initial log in setting up single sign-on and will be much faster for all future attempts.



2. On the next page, click **Get Started** to start the account creation process.



3. Create a password. Make sure your password meets the requirements and enter it in both text fields.
 - a. Each requirement will show a green check once it is met. If you'd like to see the password you've entered, press the eye icon.

Tip: Click the arrow next to "Tips for remembering your password" to find helpful tips for creating an easy-to-remember password.

Progress indicators: Create Password (filled), Verify Phone (empty), Review Info (empty)

Create your password

Password should be at least 8 characters.

[View tips for remembering your password](#) ▾

New Password

.....

✓ At least 8 characters
✓ Cannot contain parts of your name or email address

Confirm Password

.....

[Create password](#)

[Back](#)

4. Click **Create password**.
 - a. Next, you will be asked to verify a phone number which will be used to securely recover your password if you forget it in the future. Choose text or voice for your preferred method of verification.

5. Input your phone number and click **Text me** or **Call me** to receive a verification code via text or voice. You can add an extension if needed.

The screenshot shows the 'Verify Phone' step of the account creation process. At the top, a progress bar indicates 'Create Password' is complete and 'Verify Phone' is the current step. The main heading is 'Receive a text message' with a subtext: 'A security code will be sent to your mobile phone in a text message'. Below this is a dropdown menu for 'United States', a text input field for '+1 Phone Number', and a grey button labeled 'Text me'. A blue 'Back' link is at the bottom.

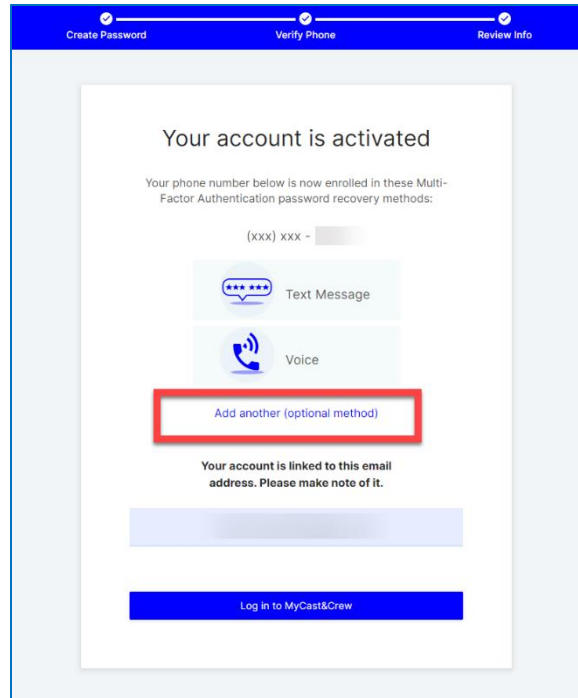
The screenshot shows the 'Verify Phone' step of the account creation process. At the top, a progress bar indicates 'Create Password' is complete and 'Verify Phone' is the current step. The main heading is 'Voice' with a subtext: 'You'll receive a phone call with a security code.'. Below this is a dropdown menu for 'United States', a text input field for '+1 Phone Number', and a text input field for 'Extension'. A grey button labeled 'Call me' is positioned below the extension field. A blue 'Back' link is at the bottom.

6. Input the verification code and click **Verify and enroll in text and voice**. If you did not receive a code after 30 seconds, click **Text me again**. If you chose the voice option, you can choose to **Verify and enroll in voice only**.
7. Review the confirmation page, which will show you which email is tied to your account. We recommend making a note of this, so you don't forget.

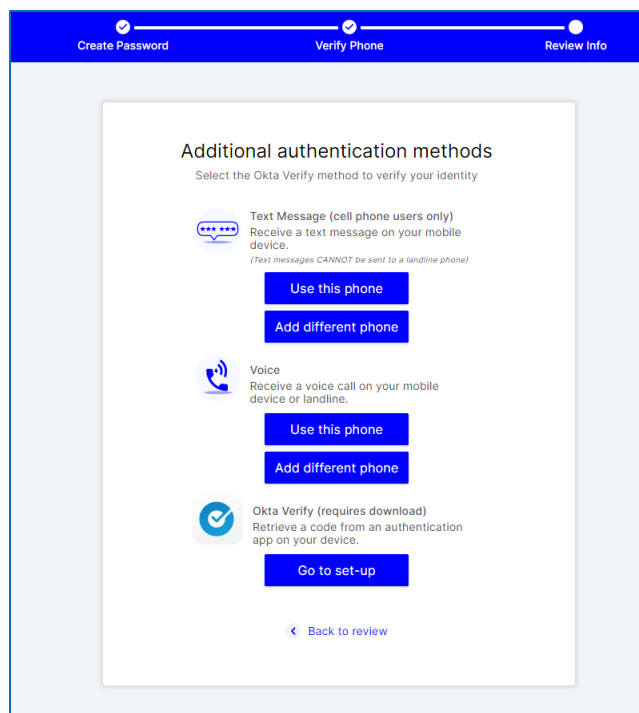
The screenshot shows the 'Review Info' step of the account creation process. At the top, a progress bar indicates 'Create Password' and 'Verify Phone' are complete, and 'Review Info' is the current step. The main heading is 'Your account is activated'. Below this is a subtext: 'Your phone number below is now enrolled in these Multi-Factor Authentication password recovery methods:'. A blue link 'Add another (optional method)' is centered. Below that, a bold text states: 'Your account is linked to this email address. Please make note of it.'. A grey button is partially visible below the text. At the bottom, a blue button labeled 'Log in to MyCast&Crew' is centered.

Setting Up The Okta Verify App

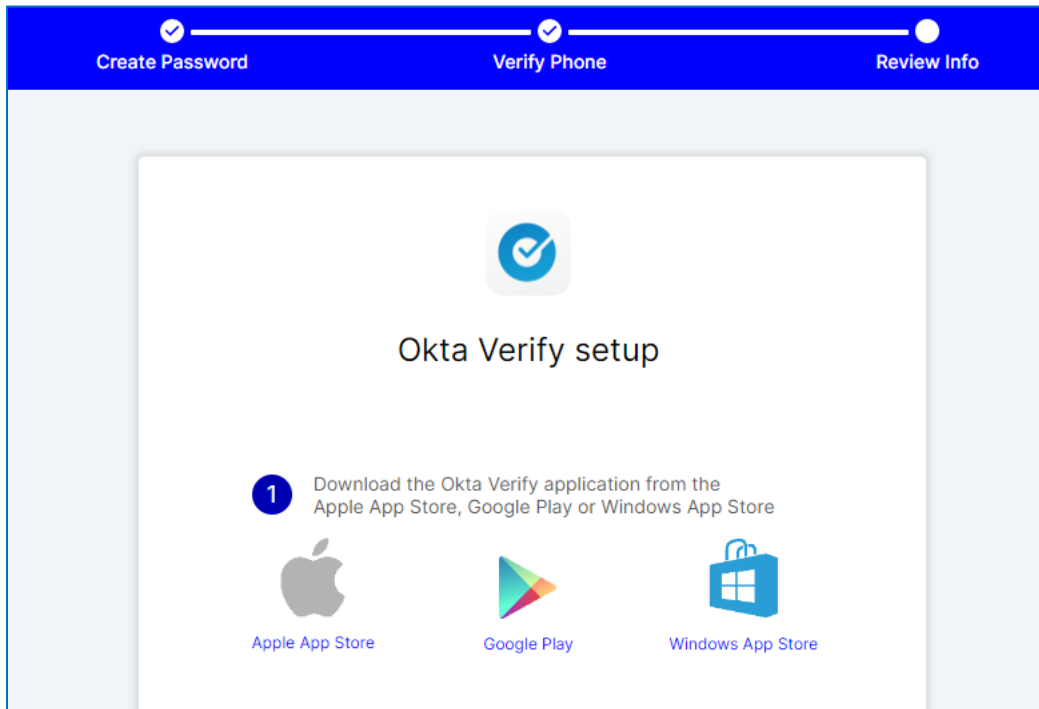
1. To set up the Okta Verify app, click **Add another (optional method)**.



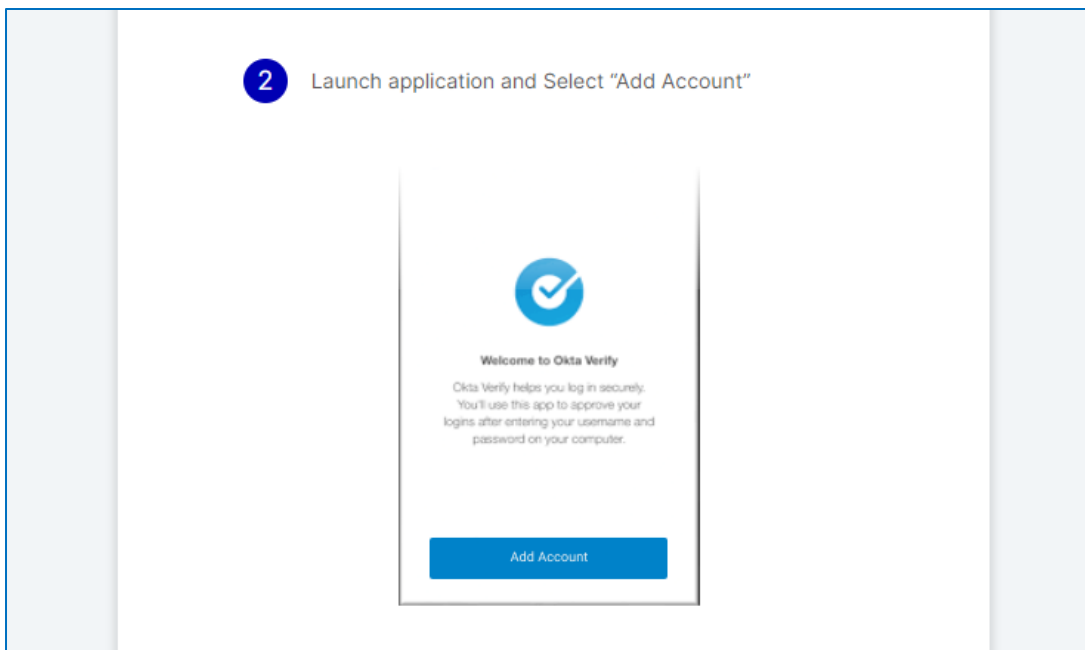
2. Click **Go to set-up**.

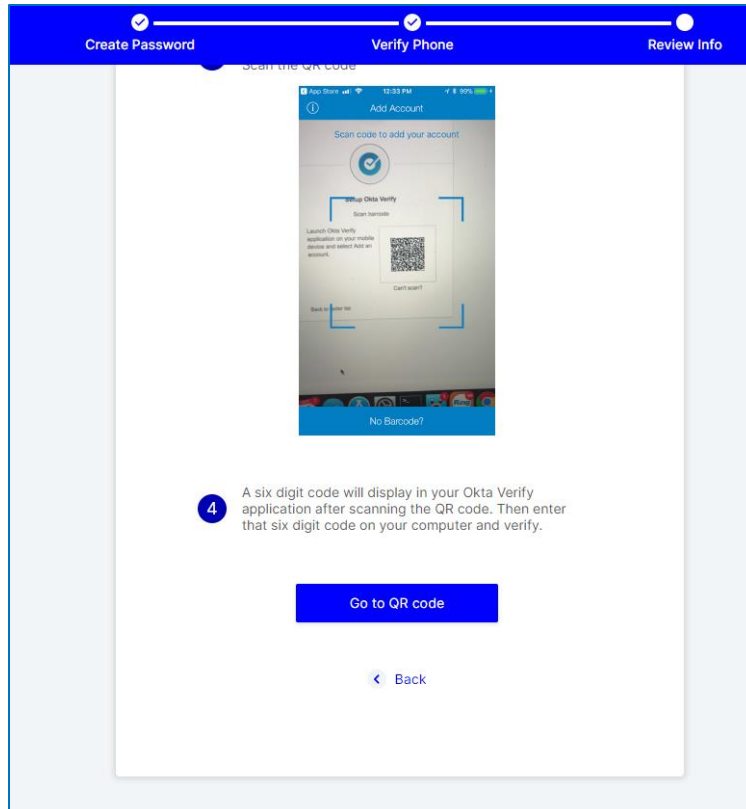


3. Select the correct app store on your device to download Okta Verify on your mobile device (phone or tablet).

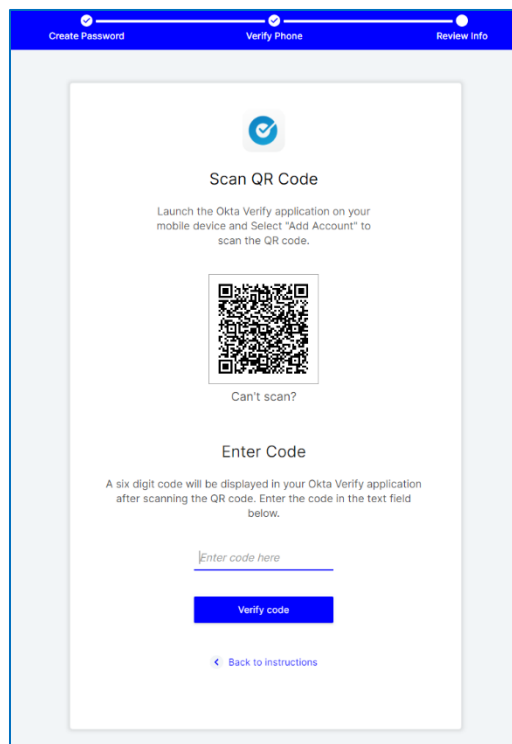


4. After the app is downloaded, open the app, and follow the additional instructions on the screen. Click **Add Account** and then **Go to QR code** when you are ready to scan the code.

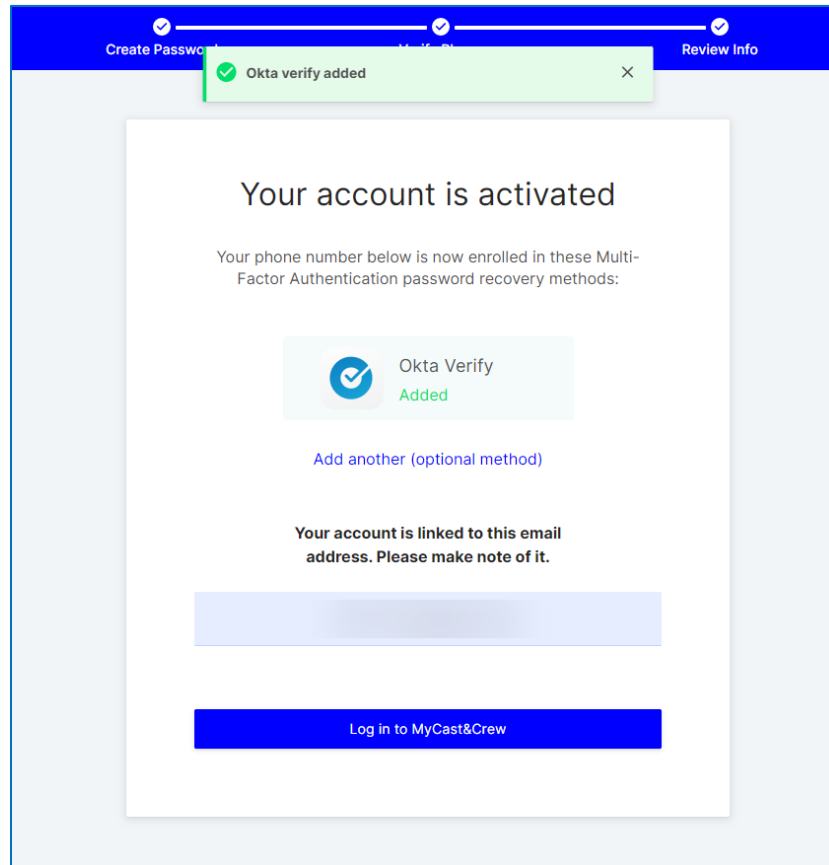




5. Scan the QR code with the Okta Verify app on your mobile device. If the QR code is not available or cannot be scanned, click **Can't scan?** and enter the code manually in the "Enter code here" field and click **Verify code**.



6. A confirmation page will show that the Okta method has been added.

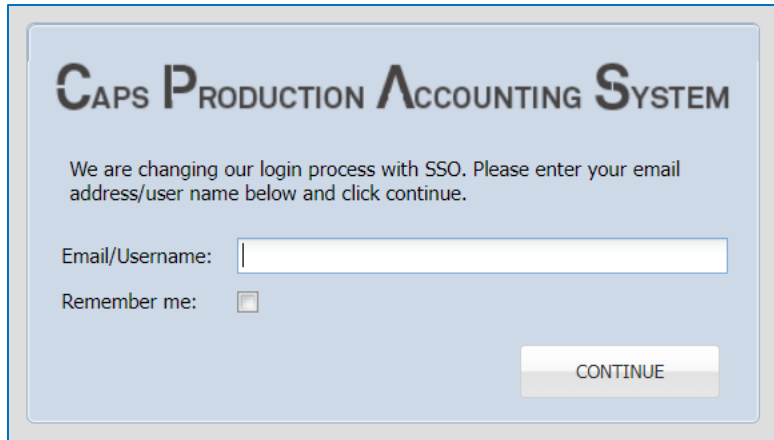


Completing Registration

1. Once you have verified your phone number via Text, Voice, or Okta, click on the option to **“Login to MyCast&Crew dashboard.”**
2. This will send you to the Log in to MyCast&Crew page.
 - a. Enter the password just you created.
 - b. Verify via Text or Voice. You may need to switch to the preferred method.
3. Accept the Terms and Conditions as well as acknowledging the Medical Provider Network disclosures.
4. Success! You will now be redirected to CPAS!

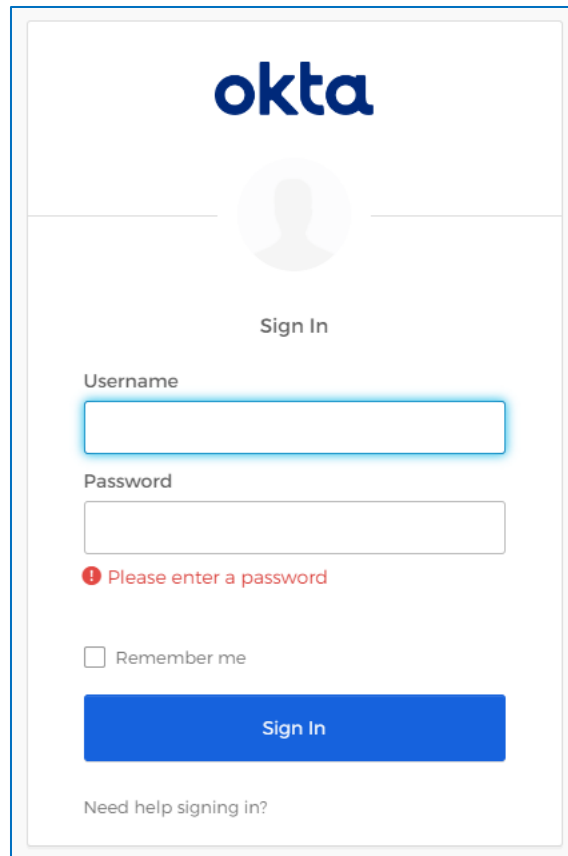
Signing Into CPAS After Registration

1. After successful registering, go to <https://nextgen.capspayroll.com/> and enter the email address you registered for CPAS.



The screenshot shows a login form for the CAPS Production Accounting System. The title is "CAPS PRODUCTION ACCOUNTING SYSTEM". Below the title, a message states: "We are changing our login process with SSO. Please enter your email address/user name below and click continue." There is a text input field labeled "Email/Username:" and a "Remember me:" checkbox. A "CONTINUE" button is located at the bottom right of the form.

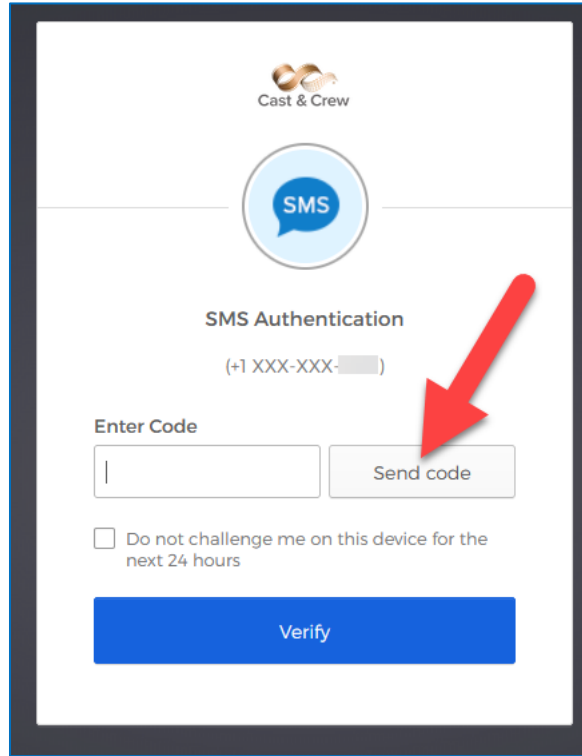
2. After pressing Continue, you will jump to the Okta login page. Enter your CPAS email address/username and password.



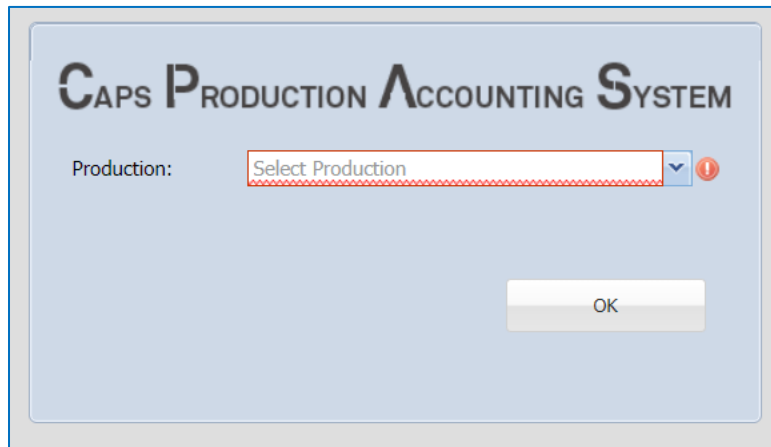
The screenshot shows the Okta login page. At the top is the "okta" logo. Below it is a "Sign In" button. There are two input fields: "Username" and "Password". The "Password" field has a red error message: "Please enter a password". There is a "Remember me" checkbox. A blue "Sign In" button is at the bottom. At the very bottom, there is a link: "Need help signing in?"

3. This will lead you to the secondary verification (Text, Voice or, Okta app)
 - a. For Text verification click on Send Code to receive the code.
 - b. After entering the code click on Verify

Tip: Check “Do not challenge me on this device for the next 24 hours”



4. Once the code has been verified you will be logged into CPAS and asked to select a Production. Click OK and you're done!



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