Voice Services

Self-Care Portal 11

User Guide

Who can use the Self-Care Portal?

uniteNY VoIP users

Why use the Self-Care Portal?

The Self-Care Portal is an application that provides the user with the ability to manage some features of their VoIP phone.

Manage features, including:

- *Voicemail PIN Reset*
- *Manage Call Forwarding*
- *Speed Dial & Busy Lamp Fields (BLF)*
- *Your Phones - Single Number Reach (SNR)*

Self-Care Portal User Guide

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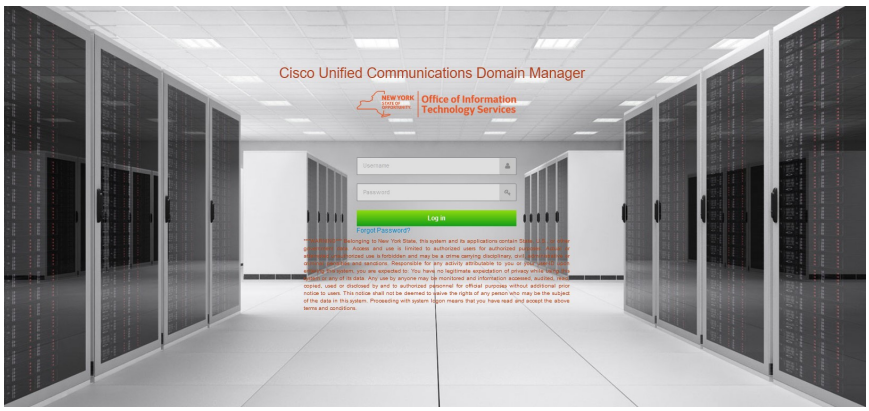
Log in to Self-Care Portal

NOTE: You must be connected to the NYS network to access the Self-Care Portal.

From your Internet browser, enter the following URL: **https://selfcare.ucc.ny.gov**

- Choose the log in method below that is appropriate to the agency or user.
- Contact your systems administrator for assistance determining which method is appropriate for the agency or user.



A. Single Sign-On Enabled User *(Log in with Email Address)*

The single sign-on method uses the same username/password used to log in to your email and other applications.

Username: Your Fully Qualified E-mail Address *(Example: jo.smith@its.ny.gov)*

Password: Your Email Password *(Same password used to sign onto your computer/email)*

Click: Login

B. UCC Sign-On User *(Log in with 10digitnumber@ucc.ny.gov)*

The Unified Communications Collaboration (UCC) method is used by certain agencies and some users where single sign-on is not enabled. Contact your systems administrator for assistance.

Username: 10digitphone@ucc.ny.gov *(Example: 1234567890@ucc.ny.gov)*

Password: #P@ssw0rd2013 *(The Default Password)*

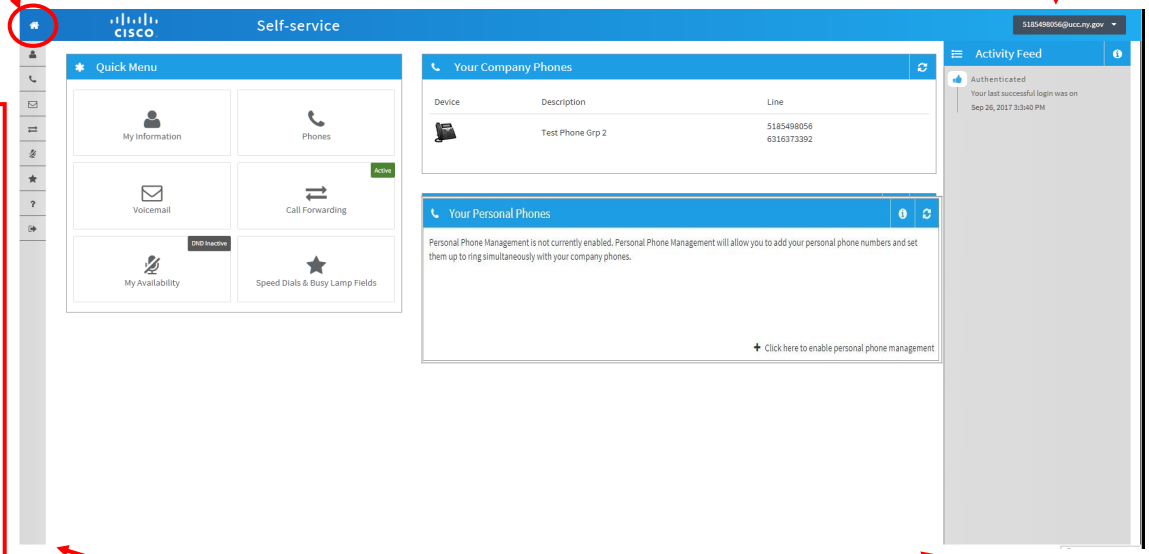
Click: Login

Landing Page & Dashboard Overview

The Landing Page & Dashboard are Displayed upon Login

Click on **Home** icon to return to Landing Page & Dashboard

Click on your **Name** for drop-down menu options



Button Bar

The icons on the left side of the screen provide an alternate method to access functions that are also available on the dashboard.

To identify each icon, hover the mouse over the icon and a description will appear.

Click icon to select the feature.

Click **?** for the **Help menu.**

Dashboard

Center area of landing page. The dashboard contains self-service functions with recognizable icons and quick links such as:

- **Quick Menu**
- **Your Company Phones**
- **Your Personal Phones**

Commonly used Functions on the Dashboard

OVERVIEW OF DASHBOARD FUNCTIONS:

All dashboard functions are also accessible using the Button Bar on the left side of the landing page.

Quick Menu:

- **My Information:** Reset your own Voicemail PIN, in the My Credentials screen.
- **Phones:** Manage phone line features.
- **Voicemail:** Manage caller input when voicemail answers call.
- **Call Forwarding:** Activate/Deactivate call forwarding of calls to voicemail or another number.
- **My Availability:** Toggle Do Not Disturb (DND) on/off for your phone.
- **Speed Dials & Busy Lamp Fields (BLF):** Program spare buttons on the phone for frequently dialed numbers. When possible, BLF buttons light to indicate status of the programmed uniteNY line. Set up numbers to dial using a code 1-99 (*depending on phone type).*

Your Company Phones:

- **Device: Select a Device to view or modify options.**
  - **Phone Details:** View the Name (MAC address), phone type, and description assigned to the device.
  - **Logged into Hunt Group:** *If applicable,* a user can log the phone in/out of designated hunt group.
  - **Phone Details by Line:** Modify line settings such as ring setting when idle/active, and visual/audible message waiting indicator (MWI) policies.

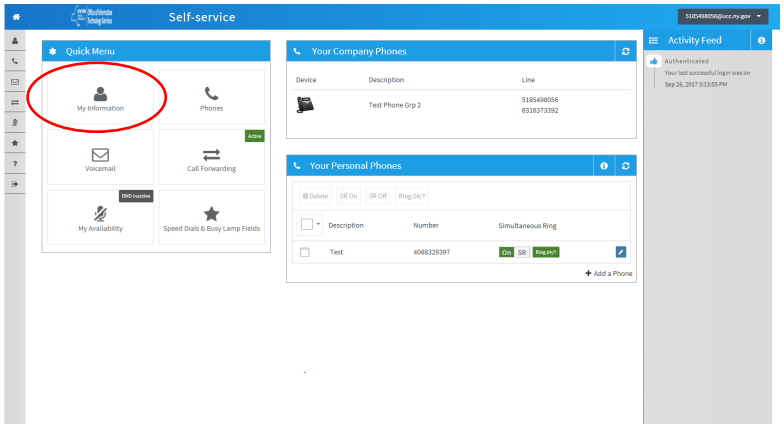
Your Personal Phones:

- **+ Add a Personal Phone - also known as Single Number Reach *(SNR):*** Allows a user to set up their line to ring to a mobile number or another 10-digit number; either simultaneously or after a brief delay.

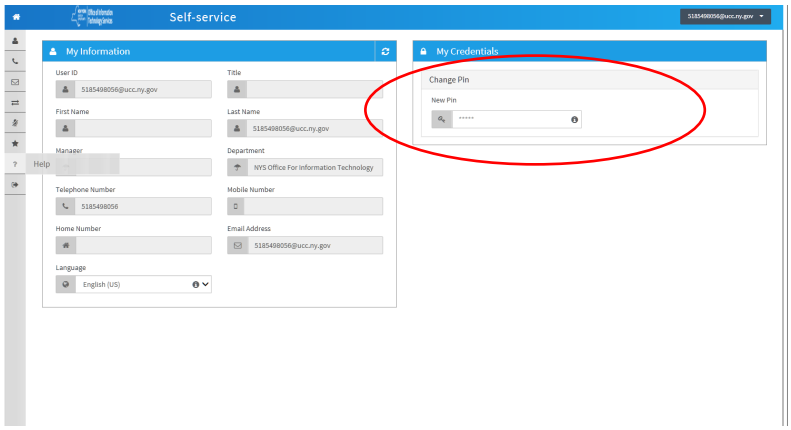
Voicemail PIN Reset

A user can reset the PIN used to access their voicemail.

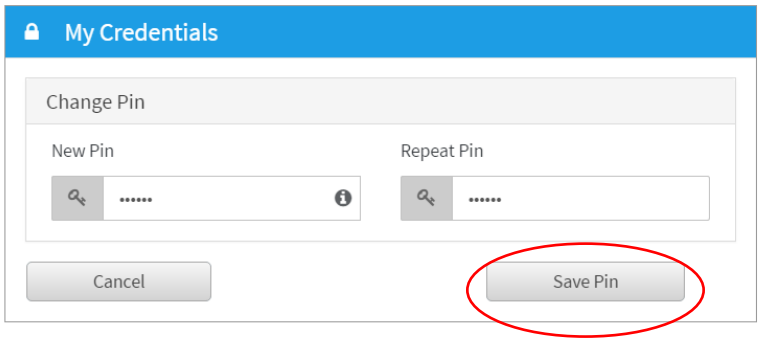
1. From the Self-service dashboard, go to **Quick Menu**, and select **My Information.**



2. Go to **My Credentials**, enter **New Pin.**

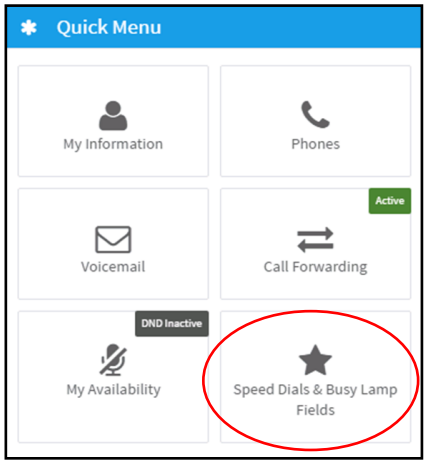


3. **Repeat Pin**: Re-enter the same new PIN, then click **Save**. Use this new PIN to access voicemail. *(Minimum length is 4)*



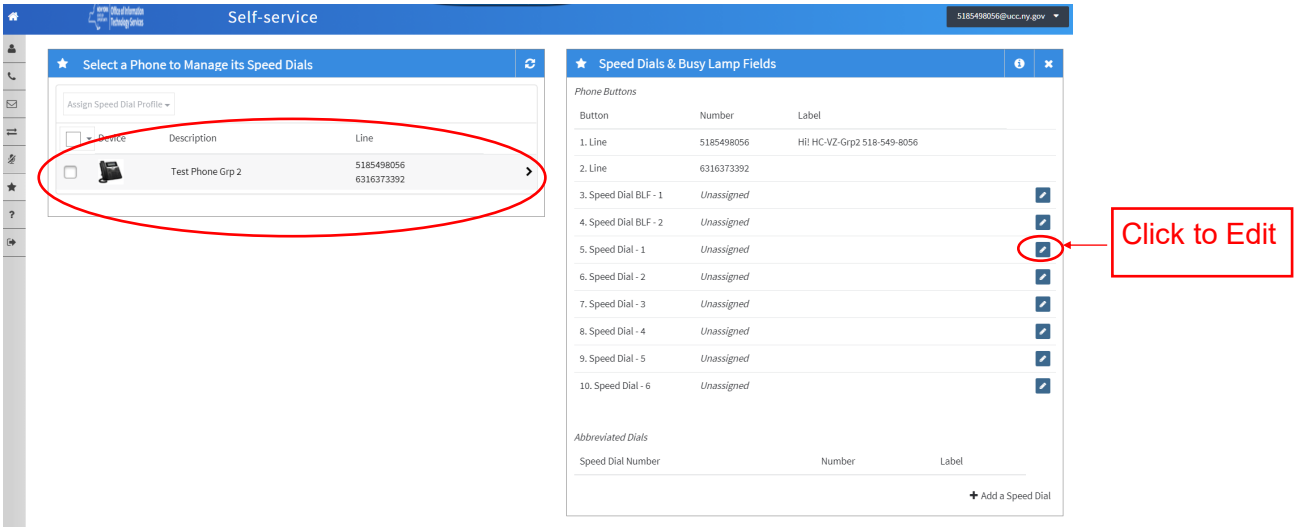
Speed Dial & Busy Lamp Fields (BLF)

If provisioned, a user can program a spare line button on their phone for a frequently dialed number. When possible, a BLF button will light to indicate the line is in use. Once the BLF button is assigned, it may be used to call the number and/or when transferring a call.



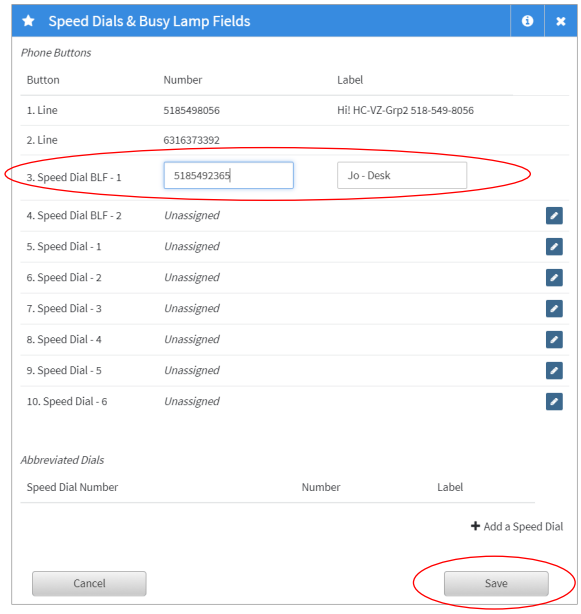
A. Add a Speed Dial BLF:

1. From the Dashboard **Quick Menu,** select **Speed Dials & Busy Lamp Fields.**
2. If the **Speed Dials & Busy Lamp Fields** screen is not already open, click on the phone to manage.
3. Click the **edit icon** of the Speed Dial BLF button to be assigned.

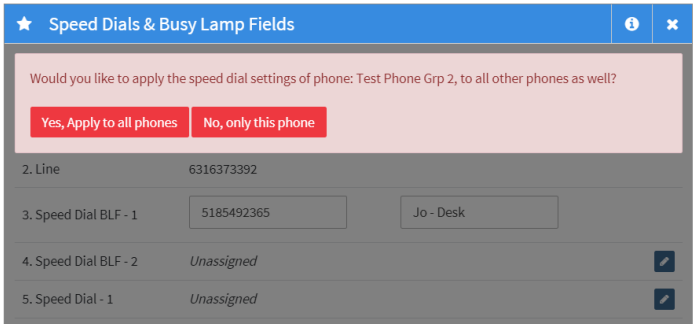


Speed Dial & Busy Lamp Fields *(continued)*

4. Enter the **10-digit number** and a name in the **Label** field. The label will appear next to the button on your phone display.
5. Click **Save.**



6. Select appropriate response whether to apply to all phones or **only this phone**. The new Speed Dial BLF will appear in the display of the phone.



To Dial Using a Speed Dial BLF:

- Press the desired **BLF** button next to the corresponding label.

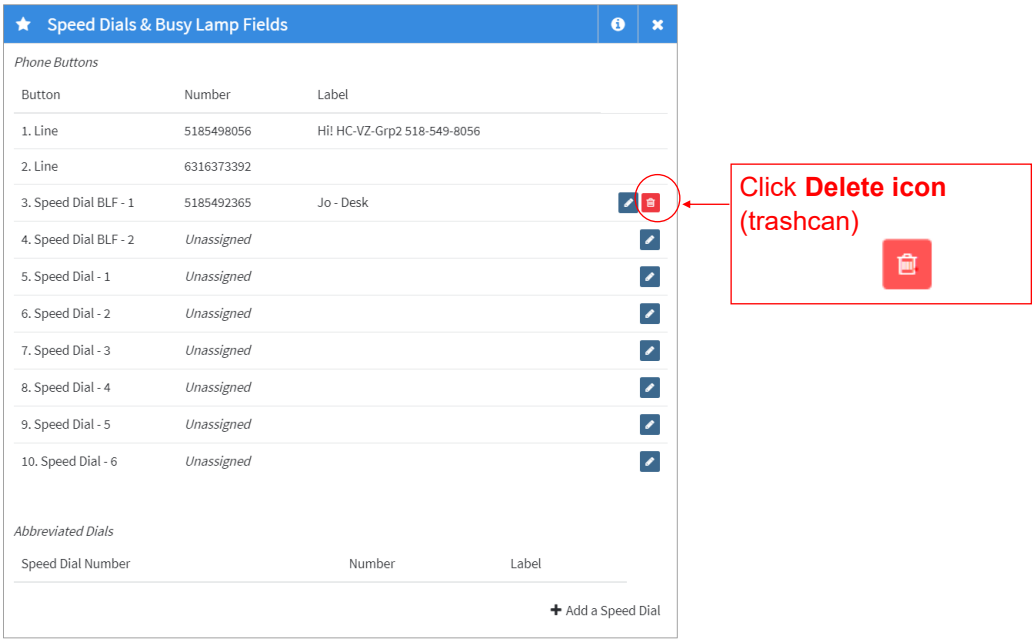
  OR

- When transferring an active call, press **Transfer**, then press the **BLF** button (*use in place of dialing the 10-digit number),* announce the call, then press **Transfer** again to complete.

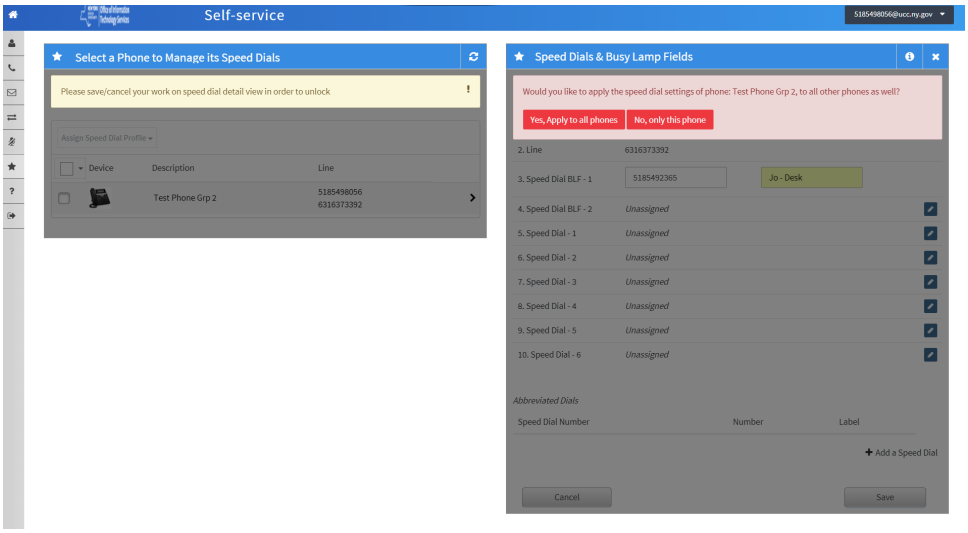
Speed Dial & Busy Lamp Fields (BLF) *(continued)*

B. Delete a Speed Dial BLF:

1. On the **Speed Dials & Busy Lamp Fields** menu, click the **Delete icon** for the Speed Dial BLF to be deleted.



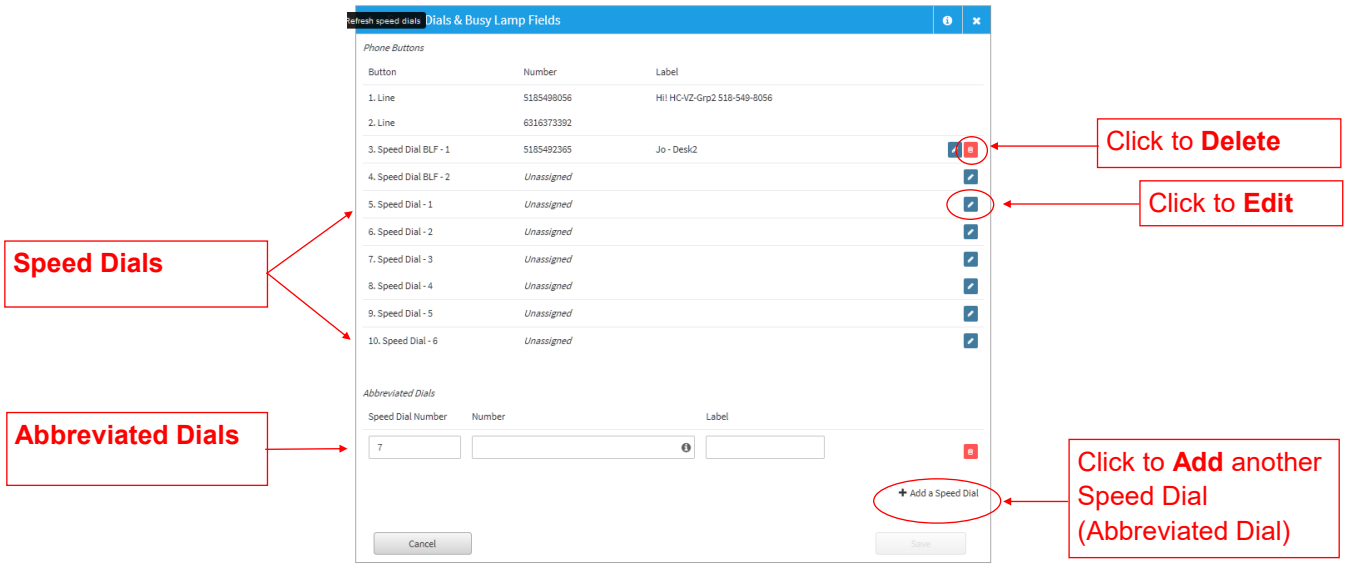
2. Choose whether the Speed Dial setting applies to all phones for this user or **only this phone**.
3. The Speed Dial BLF is deleted and the change is reflected in the phone display.



Speed Dial / Abbreviated Dial (AbbrDial) Overview

Speed Dial / Abbreviated Dial (AbbrDial) stores a frequently dialed number on a code between 1-99. Depending on the phone model and configuration, a code may be assigned as a Speed Dial or Abbreviated Dial. These features function in the same manner; however, when dialing, the soft key in the display will appear as a **SpeedDial *or* AbbrDial.**

NOTE: *The model & configuration of the phone determines layout for Speed Dials and Abbreviated Dials.*



A. Add a Speed Dial /Abbreviated Dial (AbbrDial):

1. From the Dashboard **Quick Menu,** select **Speed Dials & Busy Lamp Fields**
2. If the **Speed Dials & Busy Lamp Fields** screen is not already open, click on the phone to manage.

To Program a Speed Dial: *(Example above shows Speed Dial 1 - 6)*

- Click **Edit** icon next to the Speed Dial - # to be assigned
- Enter **10-digit number** (*no dashes or spaces)* and the **Label**
- Click **Save**, and choose whether to apply to all phones for user, or **only this phone.**

OR

To Program an Abbreviated Dial *(Example above shows Speed Dial Number 7)*

- Click on **+ Add a Speed Dial.**
- Either program the next available number that appears, or **enter a code 1-99**, depending on the phone configuration.
- Enter a **10-digit Number** *(no dashes or spaces)* and the **Label**

Speed Dial / Abbreviated Dial (AbbrDial) *(continued)*

B. To Dial Using Speed Dial / Abbreviated Dial (AbbrDial):

1. **Leave handset in the cradle** *(no dial tone is heard),* enter **code (1-99).**
2. Using the soft keys in the phone display, press the corresponding button labeled as **SpeedDial** ***or*** **AbbrDial**. The programmed number will be dialed.

> **Note:** Depending on the model phone and phone configuration, to view the **SpeedDial/AbbrDial** soft keys in the phone display, the **More** soft key may need to be selected.

C. Delete a Speed Dial /Abbreviated Dial (AbbrDial):

1. From the Dashboard **Quick Menu,** select **Speed Dials & Busy Lamp Fields**
2. If the **Speed Dials & Busy Lamp Fields** screen is not already open, click on the phone to manage.
3. Locate the Speed Dial - # or Abbreviated Dial - Speed Number to be deleted, then click the corresponding **trash can** icon.
4. Click **Save,** then choose whether to apply to all phones or **only this phone**.

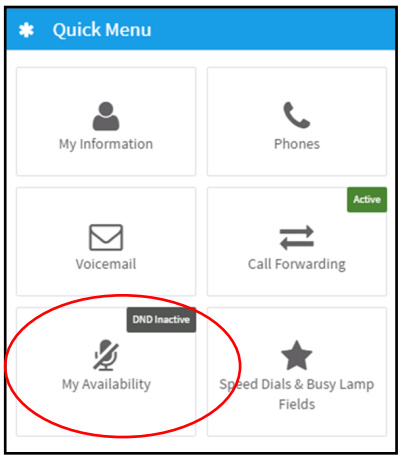
Do Not Disturb (DND)

Do Not Disturb (DND) silences incoming calls and can be toggled On/OFF. The display on the phone and the dashboard will indicate if DND is Active or Inactive. Depending on the phone configuration, when DND is active, an incoming call to the phone may play a beep or flash notification.

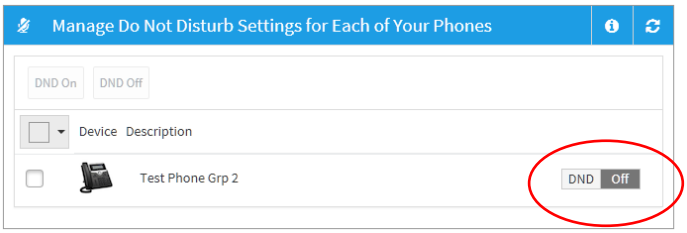
How to Toggle Do Not Disturb (DND) On/Off

1. From the dashboard go to **Quick Menu**, Select **My Availability**

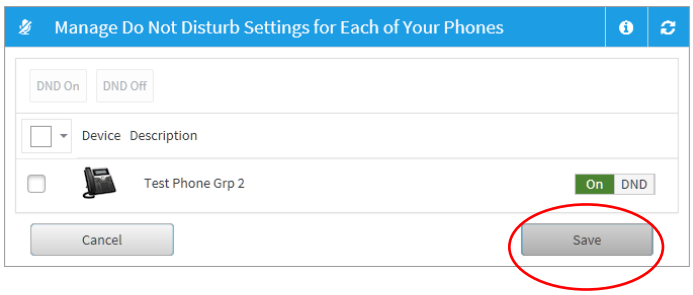
Note: The DND status appears next to the **My Availability** icon as **DND Active or DND Inactive.**



2. Locate the appropriate device, then Click on **DND** to toggle between **On/Off**, then click **Save**



DND Off = Inactive

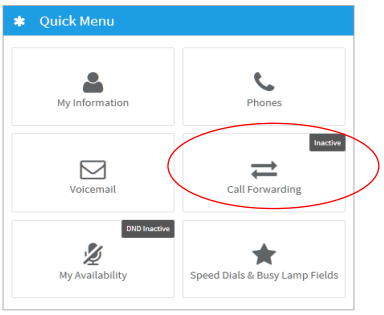


On DND = Active

Call Forwarding

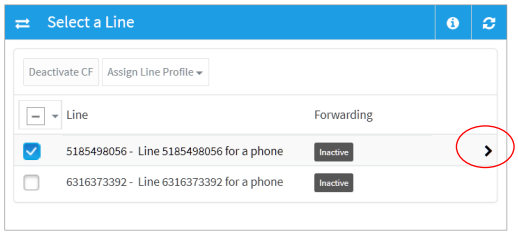
On the dashboard **Quick Menu**, the **Call Forwarding** status is displayed *(Active/Inactive).*

Call Forwarding can be modified to route Internal/ External calls to voicemail, or another 10-digit number when the line is busy/no answer.



To Modify Call Forwarding

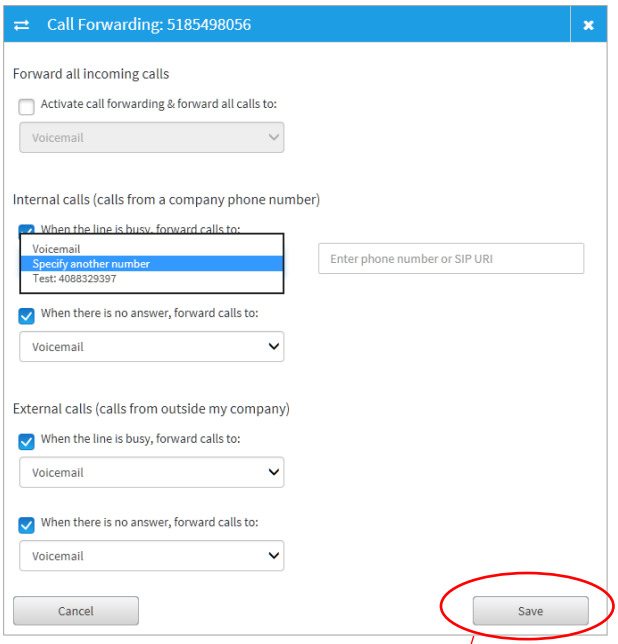
1. From the dashboard, go to **Quick Menu,** select the **Call Forwarding** option
2. Select the **Line** to manage
3. **Modify options** as necessary
4. Click **Save**, then choose to apply to all lines or **only this line.**



Forward ALL incoming Calls

ALL calls will route to voicemail or the designated phone number.

No calls will ring for this line.

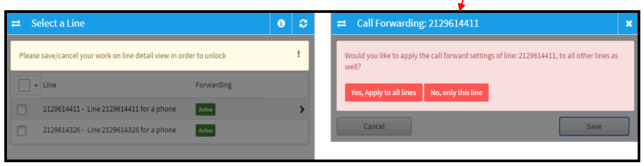


Normal Call Forward Setting

A typical user is set to forward all calls to voicemail on a busy and/or no answer.

To accomplish this:

- **Check Four Boxes:**
  - **Internal**: **Busy & No Answer**
  - **External**: **Busy & No Answer**
- Then, set all four to **Voicemail** using the drop down menu.
- Click **Save** then choose to apply to all lines or **only this line.**



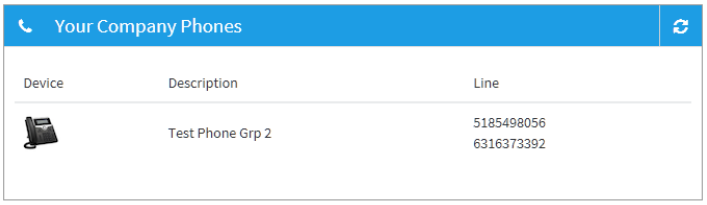
Your Company Phones - Phone and Line Settings

To Manage Phone Details

From the dashboard, go to **Your Company Phones** menu, click on the **device** to manage.

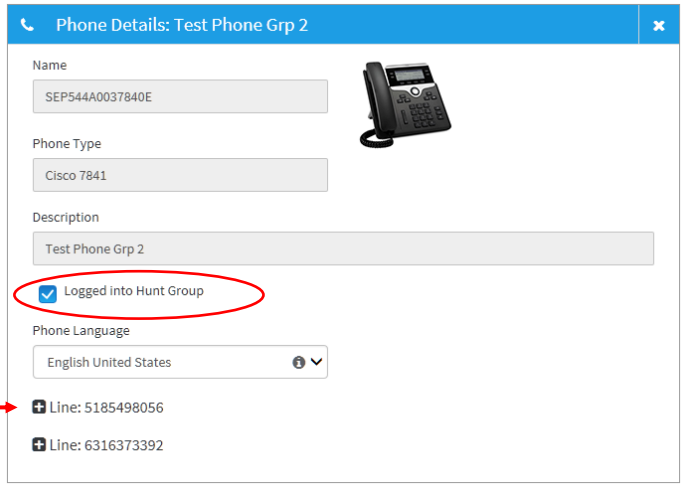
From the **Phone Details** menu

- **Modify phone** setting or line setting *(see below for options)*
- Click **Save**



Hunt Group *(If applicable)*:

- **Check box** to log phone in
- **Un-Check box** to Log phone out
- Click **Save**.



Click on **+ Line** to manage the line settings.

Select line > **modify** settings > click **Save**.

Line Label

Modify field to change the name that appears in the phone display next this line button.

No special characters (dash "-" is ok).

Visual MWI Policy & Audible MWI Policy

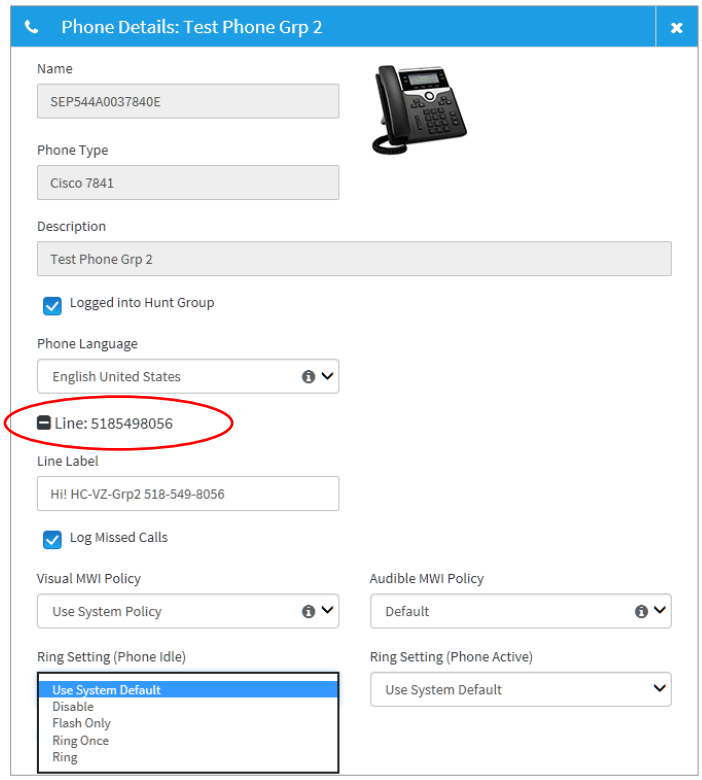
Modifies the Visual Message Waiting Indicator (MWI) of Voicemail messages. Use the pull-down menu to select desired **option,** then click **Save**.

Ring Setting (Phone Idle) or (Phone Active)

Use pull-down menu to select the ring setting for when the phone is *not* in use (idle), or when on an active call.

System Default:

Phone Idle = Ringing
Phone Active = Beep (Call Waiting)



Add a Personal Phone for Single Number Reach (SNR)

A user can add a personal phone to ring simultaneously when their desktop uniteNY VoIP phone rings. The designated number can be any 10-digit number such as a mobile number. This feature is sometimes known as **Single Number Reach (SNR)** or **Simultaneous Ring (SR).**

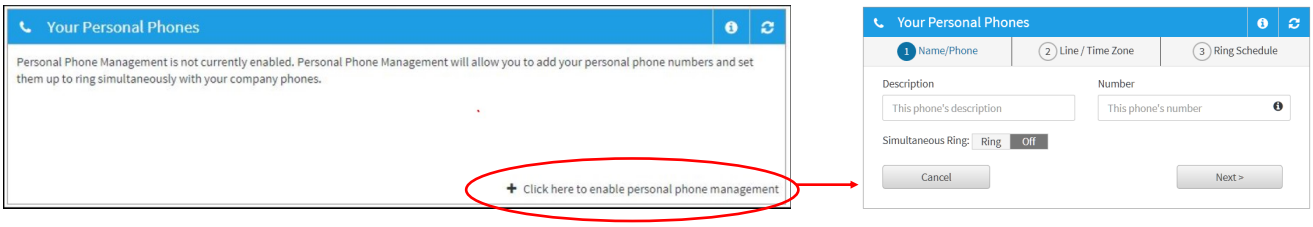
Benefits of adding a personal phone:

- Provides the user with mobility. Allows a call to be answered at either the desk phone or the designated 10-digit number.
- Enables single number reach. The caller dials one number, the desktop phone and designated number, or mobile phone rings. If not answered, the caller may leave a message on the uniteNY voicemail *(if available)*. Settings are adjustable to ensure calls are answered by the uniteNY voicemail.
- Allows users to hand-off active calls. If a user answers a call on a mobile number, the user can then pick up the active line on their desktop phone without losing the connection.

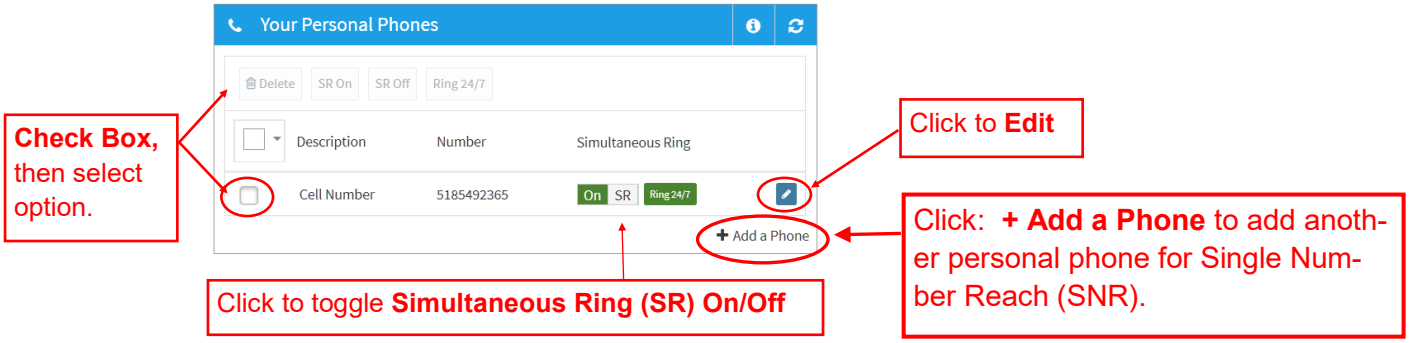
A. Add a Personal Phone for Single Number Reach (SNR):

From the Dashboard, go to the **Your Personal Phones** menu,

Click on: **+ Click here to enable personal phone management**, then enter information.



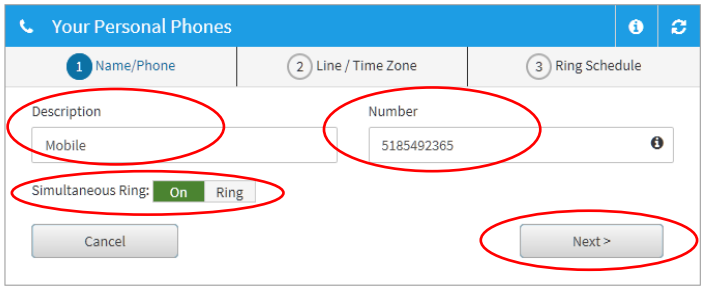
If SNR is already set up: The information will be displayed and can be modified.



Add a Personal Phone for Single Number Reach (SNR) *(continued)*

1. Name Phone

- Enter **Description**
- Enter **10-digit number**
  (no dashes or spaces)
- Click **Simultaneous Ring On/Off**
- Click **Next**



2. Line / Time Zone

- **Verify Line** number for simultaneous ring.
- Set **Time Zone: America/New_York** - Use pull-down menu to set appropriately
- **Advanced Timers Option**: Use default timers initially. Test and if necessary, modify. If adjustments are needed, go to **Your Personal Phones**, select **Edit,** return to this menu, adjust timers, click **Save**, and test again.

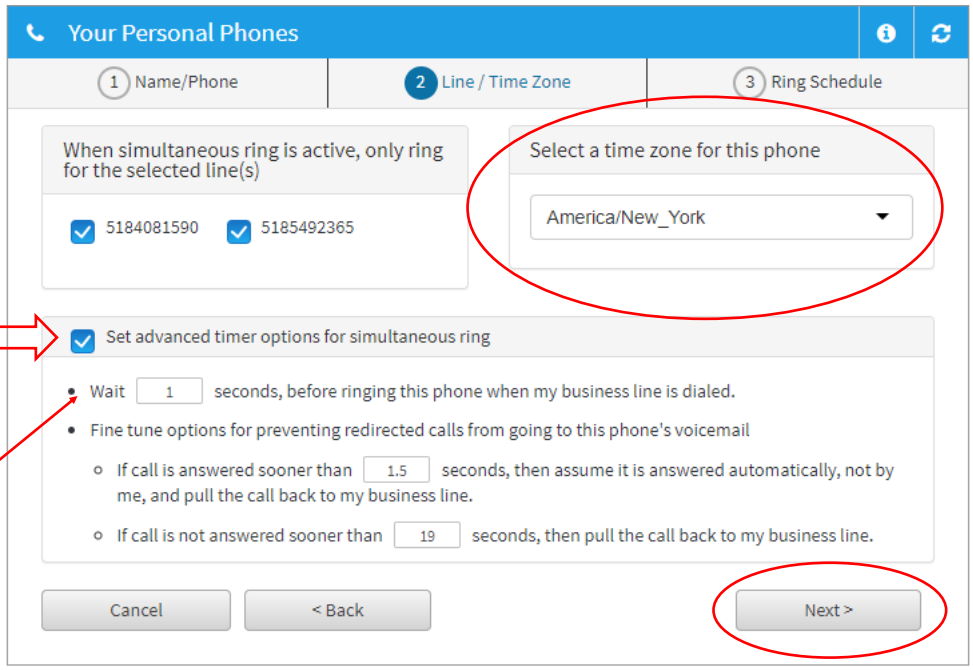
Advanced Timers:

Check Box to open menu

- Initially, test using **default setting** to test.
- Modify as needed
- **Save**, then test again.

Simultaneous Ring:

To set simultaneous ringing of company desk phone and single reach number, change this setting to **"0" Seconds.**



Add a Personal Phone for Single Number Reach (SNR) *(continued)*

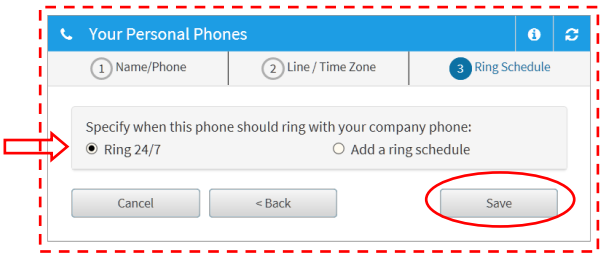
3. Ring Schedule:

Click to select either:

- **24/7**, then Click **Save**

  OR

- **Add a ring schedule**
  - Enter Ring Schedule **Name**,
  - **Check box** for days, toggle **Ring On/ Off**, and set the **From/To** timeframes. *If setting multiple days to same From/ To time, set above and Click **Apply**.*
  - Click Save



Apply to Checked Days:

Day On / OFF: Set Ring On or Off for all days checked below

From/To: Set timeframe for days checked,

Click **Apply**.

Note: 24 Hour Clock

Select Days by Group: Use pull-down menu to check/un-check multiple days.

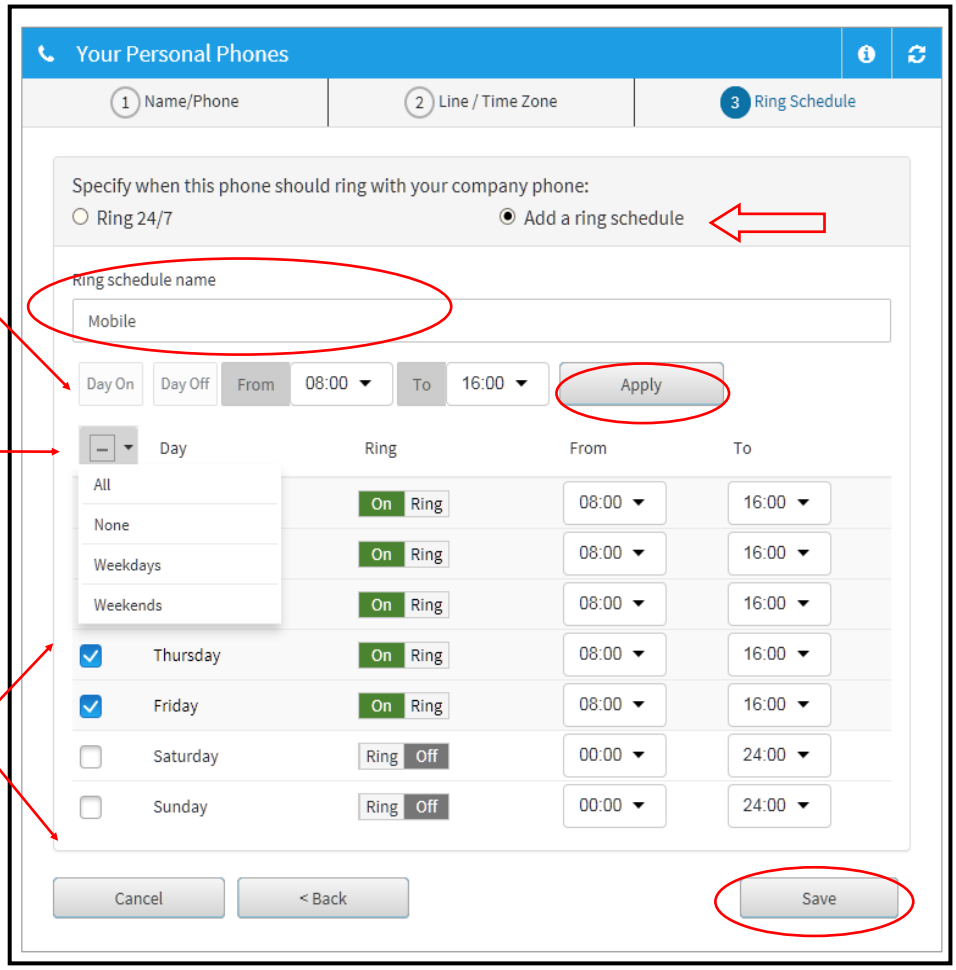
BY DAY:

Check Box: Specify each individual day

Ring: Click to toggle Ring On/Off by day

From/To: Set time by day with pull-down menu

Example of 24 Hour Clock: *4:00 PM = 16:00*



Add a Personal Phone for Single Number Reach (SNR) *(continued)*

B. Edit *or* Delete Your Personal Phone for Single Number Reach (SNR):

Check box next to Personal Phone to be modified or deleted.

- **Simultaneous Ring (SR):** Click on **SR** to toggle On/Off, then click **Save**

  OR

- **To Edit Settings:** Click on the **Edit icon**, **modify** settings as desired, then click **Save**

  OR

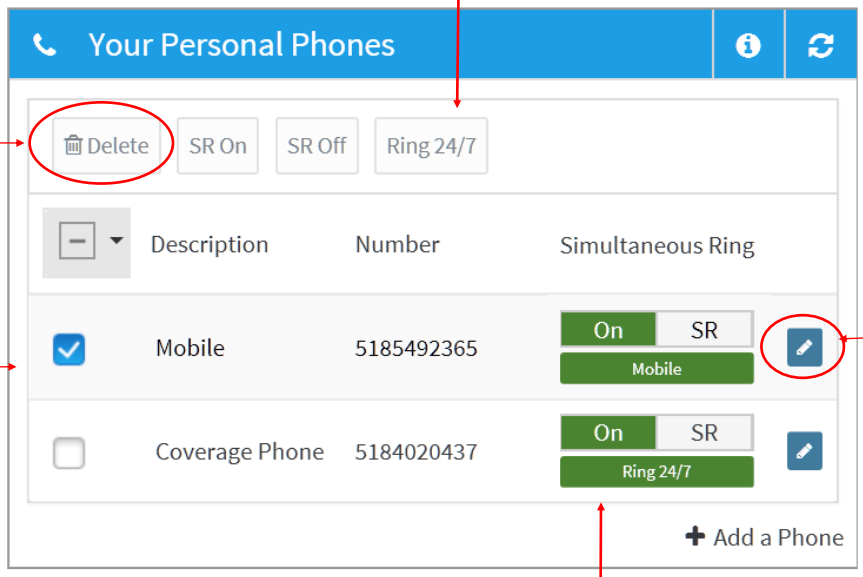
- **To Delete: Check box** next to personal phone to be deleted, click **Delete**, then **Delete** again to confirm

SR On - SR Off - Ring 24/7:

If more than one personal phone is checked, the action will apply to all phones, then click **Save**.

Delete:

Click to Delete the Personal Phone that is checked.



Check box:

Click to select the Personal Phone to be Edited/ Deleted.

NOTE:

If more than one device is checked, actions can apply to all.

Edit Icon:

Click to modify the personal phone settings.

SR: Click to toggle simultaneous ring **On/Off**, then **Save.**

Change uniteNY Self-Care Portal Password for a Single Sign-On Enabled User

What is Single Sign-On?

Single Sign-on allows a user to login to the Self-Care Portal using the same credentials that they use to access their email.

Who Uses Single Sign-On?

Many agencies that subscribe to uniteNY services are now enabled for single sign-on functionality which is used for accessing the uniteNY Self-Care Portal.

Contact your systems administrator to determine if the agency and the user is enabled for single sign-on functionality

How do Single Sign-On Users Log In to the Self-Care Portal?

Username:	**Your Email Address**	*(Example: first.last@its.ny.gov)*
Password:	**Your Password**	*(Typically, the same password used to log into their computer)*

How are Single Sign-On Password Changes Performed?

Single sign-on password changes are performed via the user's normal agency account password change process

Note:

If a single sign-on user changes their work computer's password, the Self-Care portal password is also changed.

Change uniteNY Self-Care Portal Password for a UCC Sign-On User

What is a UCC Sign-On User?

A Unified Communications Collaboration (UCC) sign-on is assigned when single sign-on is not available or not enabled.

How does a UCC user Log In to the Self-Care Portal?

Username: **10digitnumber@ucc.ny.gov**

(Example: 5181234567@ucc.ny.gov)

Password: **Enter your Password**

OR

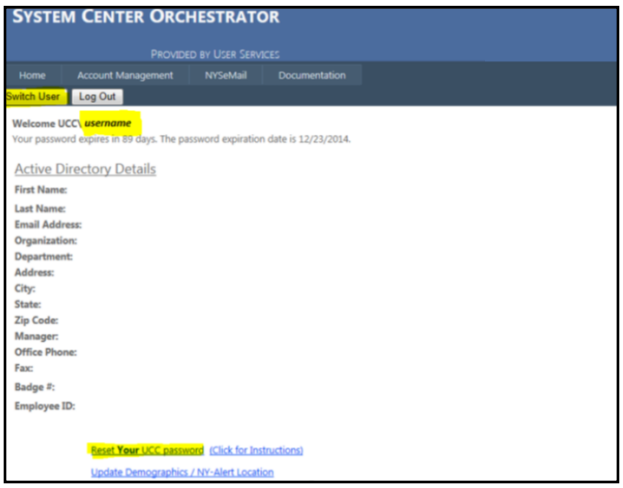
#P@ssw0rd2013 *(The **DEFAULT** Password for UCC accounts)*

To Change the Self-Care Portal Password for a UCC Sign-On User:

1. Access the **System Center Orchestrator** utility using this URL: **https://sc.its.state.nyenet**
2. If prompted for a username and password, enter your **UCC credentials** which should be:

   Username: **10digitphone@ucc.ny.gov**

   Password: **Enter your password**
3. **Verify** the welcome greeting near the top of the screen is addressed to your UCC account.
   - **If not your UCC account:** Click **Switch User** and log in using UCC credentials.
   - See screenshot of the **System Center Orchestrator** screen with a few key links/references highlighted.
4. Click **Reset Your UCC password** and follow instructions for resetting the password.
5. After changing the password, you should now be able to log into the Self-Care portal.
6. Log into the Self-Care portal using this URL: **https://selfcare.ucc.ny.gov**



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Any questions?

Please report any issues regarding access to the Self-Care Portal, or a uniteNY VoIP phone/device to:

ITS Service Desk

Phone: 1-844-891-1786

Email: fixit@its.ny.gov

Chat: https://chat.its.ny.gov

Please note: Access to Chat requires connectivity to ITSM