



**NCUA**  
National Credit Union Administration

# NCUA Connect & Admin Portal Training

**ESM**   
ENTERPRISE SOLUTION  
MODERNIZATION

# Training Objectives



## In this self-guided training module, you will:

1. Understand the purpose of **NCUA Connect** and the **Admin Portal**
2. Become familiar with how new users are granted access to **NCUA Connect** and related applications, including how to set up an **Admin Portal** administrator
3. Understand the role of the **Admin Portal** administrator and system functionality available to that user

If you have technical problems, contact **OneStop** at 1-800-827-3255 or [OneStop@ncua.gov](mailto:OneStop@ncua.gov).  
For additional information about NCUA Connect or the Admin Portal, refer to the NCUA Connect & Admin Portal User Guide.

# Application Overview



**NCUA Connect** is a secure portal to access NCUA applications implemented as part of the Enterprise Solution Modernization initiative. **NCUA Connect** enables users to securely interact and share information with the NCUA and SSA and embraces important security practices such as multifactor authentication, least privilege role-based access, and data encryption in transit and at rest. Currently, limited applications are available through **NCUA Connect**; however, additional applications will be added over time to provide a streamlined user experience.



The **Admin Portal** application provides designated credit union and SSA users the ability to manage user access to **NCUA Connect** and its associated applications for users within their organization.

Refer to the application user guides, such as **MERIT** and **CAPRIS**, for roles and permissions available for applications on **NCUA Connect**.

# Admin Portal Administrators

The **Admin Portal** application provides designated credit union and SSA users, known as administrators, the ability to manage user access to **NCUA Connect** and its associated applications for users within their organization.

To facilitate user management in **NCUA Connect**, credit unions and SSAs will designate at least two people from their organization to be **Admin Portal** administrators. These administrators are responsible for authorizing, adding, and deactivating **NCUA Connect** users for their organization. They also request access to NCUA applications on behalf of the user.

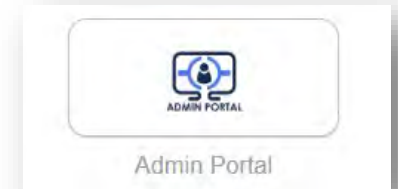
The NCUA must authorize and provide **Admin Portal** access to identified credit union and SSA administrators.



# Requesting an Administrator Account & Accessing the Admin Portal

To request the creation of an **Admin Portal** administrator for your organization:

1. Submit a request to create an administrator account to **NCUA's Technical Support** at [OneStop@ncua.gov](mailto:OneStop@ncua.gov) indicating your organization, name, email address, and any applications you may need to access in addition to the **Admin Portal** (e.g., MERIT, CAPRIS, etc.).
2. NCUA will coordinate with the respective NCUA regional office or SSA, if applicable, to verify any requests.
3. Once the administrator account is approved, the **NCUA Connect** account will be created. The designated administrator will retrieve the email sent from [NoReply@Okta.com](mailto:NoReply@Okta.com). This email includes a link to activate your account.
4. Follow the instructions and complete the process to access **NCUA Connect** (see pages 10 – 12 for guidance).
5. Using Google Chrome, click the **Admin Portal** tile to open the application.



Accounts are suspended after a period of inactivity. Only NCUA can unlock an administrator account. Contact NCUA's Technical Support at [OneStop@NCUA.gov](mailto:OneStop@NCUA.gov) if you need assistance.

# Admin Portal Landing Page

The **Admin Portal** landing page includes information about existing users for your organization. Several actions can also be done from this page, including adding users and taking actions on existing user accounts.

The screenshot shows the 'Manage Users' interface. At the top left is the 'ADMIN PORTAL' logo. The main heading is 'All Users'. Below this, there are role selection checkboxes (all three 'MERIT\_' roles are checked), a search filter box, and a 'NEW USER +' button. A table lists users with columns for Name, Username, Roles, Status, and Actions. A callout box points to the 'Actions' dropdown for the user 'Davis, Sandy', which includes options like 'Edit Profile', 'Access', 'Reset Password', 'Reset MFA', 'Suspend', and 'Deactivate'.

Click to add a new user

Filter the user list by checking and unchecking the different role options

Click to search for a user

Total: 18 Filtered: 18

NAME ^	USERNAME ⇅	ROLES	STATUS ⇅	ACTIONS
Davis, Sandy			Password Expired	Actions ▾ Edit Profile Access Reset Password Reset MFA Suspend Deactivate

This table includes information about existing users. The dropdown list of Actions is used to update a user account or take different actions, such as reset a password. Depending on the user's status, different options will be available.  
Note: Some of the Actions may trigger a workflow and approval from the NCUA, such as reactivate or access to new applications.

# Administrator Functions and NCUA Functions

## ADMIN PORTAL ADMINISTRATOR FUNCTIONS

- **Add user** – adds a user for your organization
- **Edit Profile** – update the user’s First Name, Middle Name, Last Name, User Name, and Email Address
- **Access** – update the user’s NCUA Connect and application role(s)
- **Reset Password** – sends a password reset email notification to the user
- **Reset MFA** – sends a multifactor authentication email notification to the user
- **Suspend** – temporarily disables the user’s account, however allows the administrator the ability to re-instate the account without NCUA intervention
- **Unsuspend** – re-instates the suspended user’s account
- **Deactivate** – removes the user account and should be used in situations where the user has been off-boarded from your organization or will no longer require NCUA Connect access in the future
- **Request Reactivation** – submits a reactivation request for a deactivated user to the NCUA application approvers

## NCUA TECHNICAL SUPPORT OneStop@NCUA.gov

- Unlock administrator accounts
- Reset challenge questions for any user
- Request new administrators
- Remove administrators
- Add applications for administrators

# Adding a User in the Admin portal

To add a new user, the administrator will click the **Add New User** button on the landing page. A form will display with required and optional fields (such as middle name) about the user. Each user must be granted at least one user role.

**+ New Access**

\*First Name  Middle Name  \*Last Name

\* Email Address

Use as User Name

\*Roles

MERIT

MERIT

MERIT

*At least one role is required*

Comment

**Upon Submit:**

Per security requirements, an email notification will be sent to the NCUA approvers to review the request. The NCUA may contact the administrator with any questions and will approve or deny the request.

In most cases, users are approved. When approved, the administrator and the user receive an email notification.

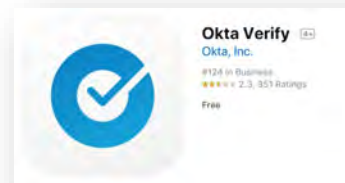
If an account is denied for any reason (such as an incorrect email address for the user), the administrator will receive email notification with an explanation for the denial.



# Setting Up Your NCUA Connect Account

Once the **Admin Portal** administrator creates a new user account for an individual in their organization and it has been approved by the NCUA:

- 1) The user will receive an email sent from **NCUA Connect - [noreply@Okta.com](mailto:noreply@Okta.com)**.
- 2) The user will click the link in the email and complete the registration process including setting up at least one multi-factor authentication (MFA) method.
  - There are 3 MFA options including:
    - Voice Call
    - SMS Text Authentication
    - Okta Verify application



Welcome to NCUA Connect (via the Okta service), the National Credit Union Administration's secure, central access point for web applications.

Your username is  
The sign-in page

Your system administrator has created an Okta user account for you.

**To activate your account and initiate access to NCUA applications, please click the following button and follow the registration process.**

[Activate Okta Account](#)

Watch this short [video](#) to learn more about NCUA Connect. By clicking the link above and activating your account you are agreeing to follow NCUA's system [rules of behavior](#). NCUA's system rules of behavior, user guides, and additional information are available for reference on [NCUA's web site](#).

If you experience difficulties accessing your account, send a request to your administrator or contact NCUA OneStop at [OneStop@NCUA.gov](mailto:OneStop@NCUA.gov) or (703)518-6450 or (800)827-3255.

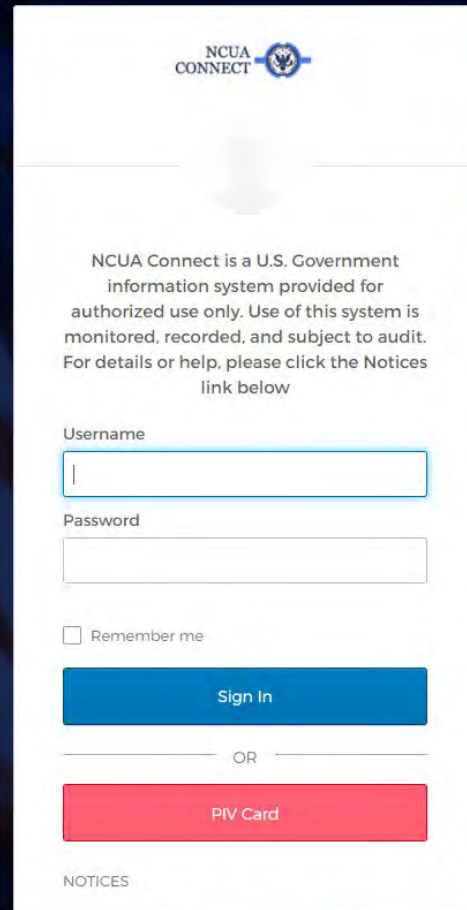
User accounts are locked after a period of no activity. If you believe your account is locked, contact your **Admin Portal** administrator.

# Log In to NCUA Connect

This is a U.S. Government information system provided for authorized use only. Use of this system is monitored, recorded, and subject to audit. Access or use of this system constitutes a user's understanding, acceptance, and consent to review, monitoring, and action by authorized government and law enforcement personnel. The data and documents of this system are federal agency records and the NCUA may use or disclose these records authorized federal government purposes.

Unauthorized use such as attempts or action to (1) access, upload, change, or delete or deface information on the system; (2) modify this system; (3) deny access to this system; (4) accrue resources for unauthorized use; (5) otherwise misuse this system are strictly prohibited and may result in criminal, civil, or administrative penalties. The NCUA Connect application made available on this website is provided by a third party affiliate. When using a third party application, the user may be subject to its terms and licenses. By accessing this system, you are agreeing to these terms of use.

This system is protected by the Privacy Act of 1974, 5 U.S.C. § 552. <https://www.ncua.gov/privacy/privacy-act-statements>



NCUA  
CONNECT

NCUA Connect is a U.S. Government information system provided for authorized use only. Use of this system is monitored, recorded, and subject to audit. For details or help, please click the Notices link below

Username

Password

Remember me

Sign In

OR

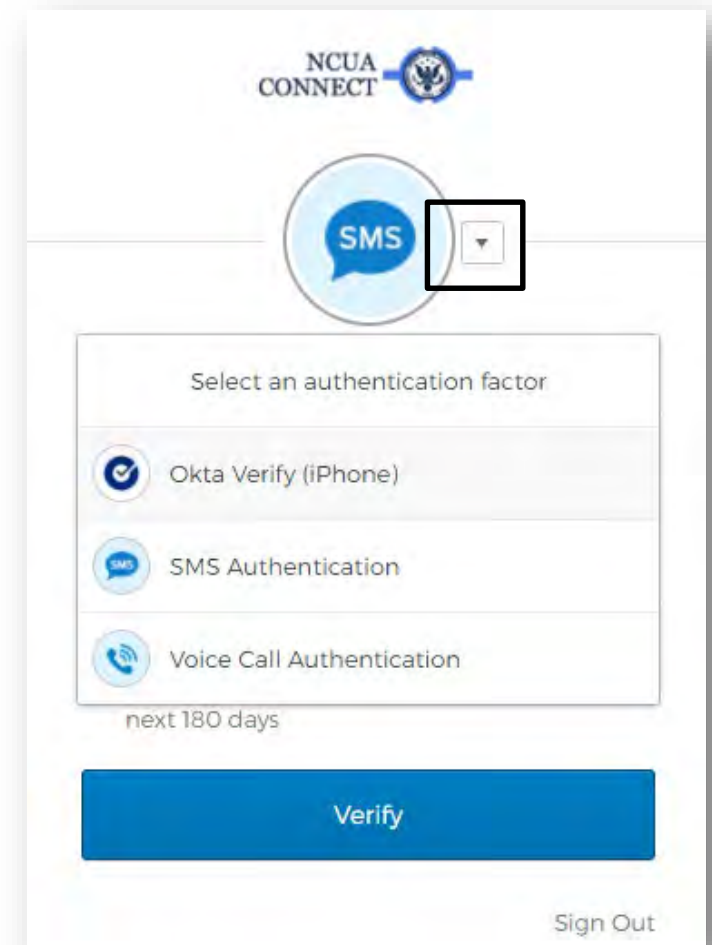
PIV Card

NOTICES

1. Open the **NCUA Connect** login page at <https://NCUA.okta.com>
2. Enter your **Username** and **Password**.
3. Click **Sign In**.

# Selecting MFA and Opening Applications

1. Enter your multifactor authentication code. If you set up more than one MFA option, you can change your MFA preference by clicking the arrow next to the current MFA selection and choosing another option.
2. Once logged in, you will see tiles for each application. Click on the tile to open the application. If an application is missing, contact your **Admin Portal** administrator to see if it is available on **NCUA Connect**.



# Admin Portal Email Notifications

To facilitate communication between administrators, users, and the NCUA about user account actions, the **Admin Portal** includes email notifications.

Notification	Description
New Account Request Approved	Informs the requestor the new account request is approved by the NCUA. A separate email is sent to the new user prompting them to set up their <b>NCUA Connect</b> account.
New Account Request Denied	Informs the requestor a new user account was denied with an explanation for the denial.
User Reactivation Request Approved	Informs the requestor the account reactivation request was approved by the NCUA. A separate email is sent to the reactivated user prompting them to set up their <b>NCUA Connect</b> account.
User Reactivation Request Denied	Informs the requestor the user reactivation request was denied and provides an explanation for denial.
Application Approval	Informs a user of new applications available on <b>NCUA Connect</b> .
Application Change Request Approved	Informs the requestor a new application was approved by the NCUA.

# Resources

- [www.NCUA.gov](http://www.NCUA.gov) > Enterprise Solution Modernization
- **NCUA Connect & Admin Portal User Guide**
- Frequently Asked Questions
- NCUA Technical Support: [OneStop@NCUA.gov](mailto:OneStop@NCUA.gov)
- Send Suggestions to: [BIEmail@ncua.gov](mailto:BIEmail@ncua.gov)

## Enterprise Solution Modernization (ESM) Program

The financial services landscape is ever changing, which means the NCUA must adapt to keep pace and provide for a safe and sound credit union system. The Enterprise Solution Modernization (ESM) program is a multi-year effort to introduce emerging and secure technology solutions that support the NCUA's examination, data collection and reporting efforts to improve key, integrated business processes. The result will be a flexible technology architecture that integrates modernized systems and tools across the agency.



### History and Milestones of the ESM Program

- **November 2015** — The NCUA Board establishes the Enterprise Solution Modernization Program, to include hiring of additional resources within the Office of the Chief Information Officer.
- **March 2016** — The NCUA Board approves Business Innovation positions to lead and coordinate NCUA's [Enterprise Solution Modernization Program](#) to upgrade technology, improve efficiency and reduce examination costs.
- **January 2017** — Business Innovation establishes a state supervisory authority working group to inform and provide input



# Training Module Complete!



You've reached the end of this training module.

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