



Partner Manager Role User Guide

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Summary

The Partner Manager role will enable authorized Partners to carry out key activities in the MyACCESS Portal on behalf of their client's, including:

- Searching for and viewing information related to submitted applications and existing cases.
- Filling out and submitting applications and renewals for assistance and reporting changes (SNAP, TCA, Medicaid).
- Accessing key program information and Help & Resources.

Additionally, Partner Managers will be able to perform the following:

- Manage organization information:
 - Edit organization details like phone number, hours of operation etc.
- Manage organization locations:
 - Add more locations for an organization if the organization has multiple locations but one parent organization.
- Manage staff information:
 - Search and edit staff member details.

Getting Started

1. Navigate to: <https://myaccess.myflfamilies.com/>
2. From the home page, click on the **Partner Login** Button.

Are you a Partner?

Do you have a MyACCESS Partner account? Log in as a partner to get started.

Partner Login

Do you want to become a Partner? Please click the button below to submit an interest form.

Partner Interest Form



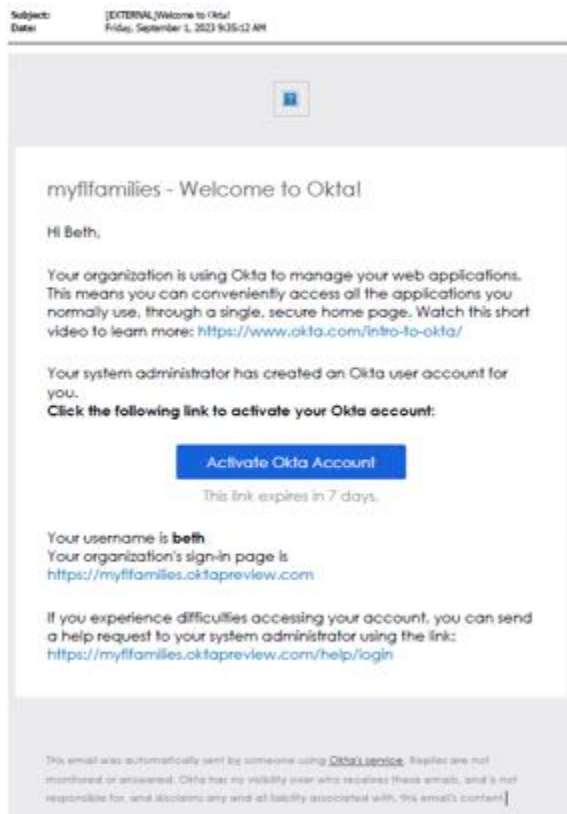
3. Accept Rights, Responsibilities, HIPAA Agreement and Important Information (terms and conditions) and you will navigate to the Partner Manager dashboard.

Note: An active partner organization and an OKTA account are required to log in as a Partner Manger. If your organization is not already a current partner, navigate to <https://www.myaccess.myflfamilies.com> and click the Partner Interest Form.

If your organization is already a current partner and you are looking to update who is registered as the Partner manger, please send an email to hqw.ess.partner@myflfamilies.com if you are a Community Partner. If you are an ESS Representative or EDP Partner, please email Hqw.ESS.Representatives@myflfamilies.com

Once the role has been added (new partners) you will get an email with instructions for setting up your OKTA account. **Make sure to check your junk or spam folder.**

Example:



This needs to be done within 7 days or the invite will have to be resent. Once you have your OKTA account setup, please follow these steps to log in.



Partner Manager Dashboard

Hi, CPTestOkta1

Access Affordable Benefits,llc

Client Search

Search for clients to:

- Verify their current benefits status and coverage dates
- View their share of cost responsibilities
- Confirm their benefit PIN
- Print temporary Medicaid cards
- Select to add clients to your "My Clients" list

[Search](#)

My Clients

[View Clients](#)

My Applications

12	In Progress	View
16	Submitted	View
21	Received	View
2	Processed	View

[New Application](#)

[View My Applications](#)

[View Documents Needed](#)

Submit Documents

Upload documents for an application or case.

[Upload a Document](#)

My Reports

View key metrics about application you've created and submitted.

Applications Submitted This Week	Applications Processed This Month

[View Reports](#)

Referral Campaigns

Manage your referral campaigns and export your campaign reports.

Applications submitted using a referral code this month.

[View Referral Campaigns](#)

My Organization Information

[View Organization Information](#)

Staff Applications

Manage your staff's applications.

[View Staff Applications](#)

Help & Resources

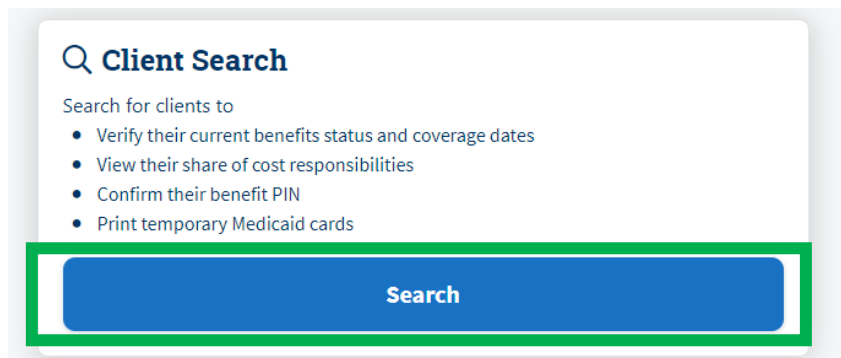
[View Help Center](#)



Client Search

The Client Search functionality allows Partners to locate their client's information to carry out activities on their behalf.

Note: You must have prior authorization from clients to access their data. You must have either a Partner View Release form or Authorized Representative form on file from the client.



Click on the **Search** button in the Client Search tile of the dashboard.


Search for clients using their Date of Birth and the preferred search type.

A screenshot of the "Client Search" form. At the top left is a link "< Back to Dashboard". Below it is the title "Client Search". The form has two required fields: "Date of Birth" with a text input showing "MM/DD/YYYY" and a calendar icon, and "Search Type" with a dropdown menu showing "-Select One-" and a green checkmark. Below these fields is a large blue button labeled "SEARCH".A close-up screenshot of the "Search Type" dropdown menu. The dropdown is open, showing the following options: "-Select One-", "Case Number", "Application Number", "Social Security Number", and "Personal Identification Number (PIN)".



From the search results you have two options.

Results (1)

Individual ID (PIN)
7405980694 

VIEW

Last Name	First Name
JASMINE	PRINCESS
Gender	Social Security Number
Female	***-**-2536

Click on the **heart** icon next to the clients PIN ID to save this client as a “favorite”. Doing so allows you to quickly navigate to their information from your dashboard under My Clients.

Click the **View** button to view the client dashboard. This will allow you to view the clients’ dashboard the same way the client would see it if they were logged in. You will not be required to link the case or sign in with the client’s email address.

From the client’s dashboard, you will be able to see all their activities and relevant information.

Note

Different clients have unique situations and are applying for and receiving different benefit types so not all client dashboards will look the same.



Client Dashboard Example:

Welcome, ESSRep_UAT1.

Things to Do

These items are due soon.

Upload Documents

Case 50

[Upload documents needed](#) Due 05/24/2024

Notices

You have 3 unread notice(s).

[View your Notices](#)

What else would you like to do?

Am I Eligible?
[See if you qualify for other programs or benefits.](#)

Report a Change
[Report a new address, birth of a child, someone moving in or out, change in your job, etc.](#)

Add a Program
[Apply for new programs like TCA, SNAP, Medicaid.](#)

View Notices
[View documents sent to you](#)

Document Center
[View your upload history and upload additional documents.](#)

My History
[View everything you applied for - applications, renewals, and change reports.](#)

Card Replacement
[Request a replacement EBT or Medicaid card.](#)

Cancel Benefits
[Close your case and stop receiving benefits.](#)

Need Help?

Need more help? Visit the Help Center for videos, tutorials, and FAQs (Frequently Asked Questions).

[Take me to the Help Center](#)

Your Applications and Cases

View your open applications and cases.

Application 800

Food Assistance applications can take up to 30 days to complete, Cash and Medicaid Applications can take up to 45 days to complete. Some special Medicaid applications may take longer.

Submitted

Completed

Documents Needed

We need some additional information from you. Please check the Things to Do section in your MyACCESS Account to upload documents needed. Uploading your information is the quickest way to get your information to us.

[Show Details](#)

Case 500718

SNAP HOLD

ALEXANDRIA SHAH

[VIEW CASE DETAILS](#)



The client's dashboard is organized into the following groups:

- **Things to Do**

Items such as the ones listed below will appear here.

- Unfinished applications
 - Note: if a client has started an application, you will not see the finish application tile under 'things to do' – only the client will see that. If you as a representative start an application for a client and do not finish, then you will see the finish application tile.
- Unread notices

- **What else would you like to do?**

Under this section the following options may be available:

- Am I Eligible
- Report a Change
- Add a Program
- View Notices
- Document Center
- My History
- Card Replacement
- Cancel Benefits

- **Need Help?**

This navigates you to the help center.

- **Your Applications and Cases**

Application and case information will display here.

- If there is a pending application, renewal, or change, you can see the application status and tracker.
- If there is an open case, you can click on "view case details" to view program details including benefit information, Medicaid coverage and share of cost information.

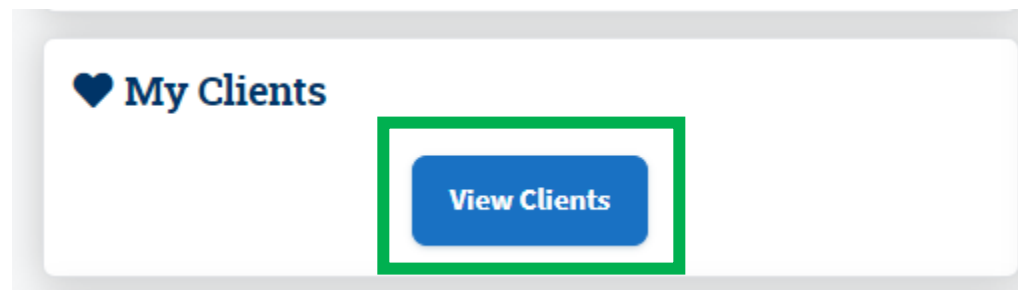
To navigate back to your partner manager dashboard, use the link at the top of the page.

You are now viewing a customer's dashboard. [Click here to go back.](#)

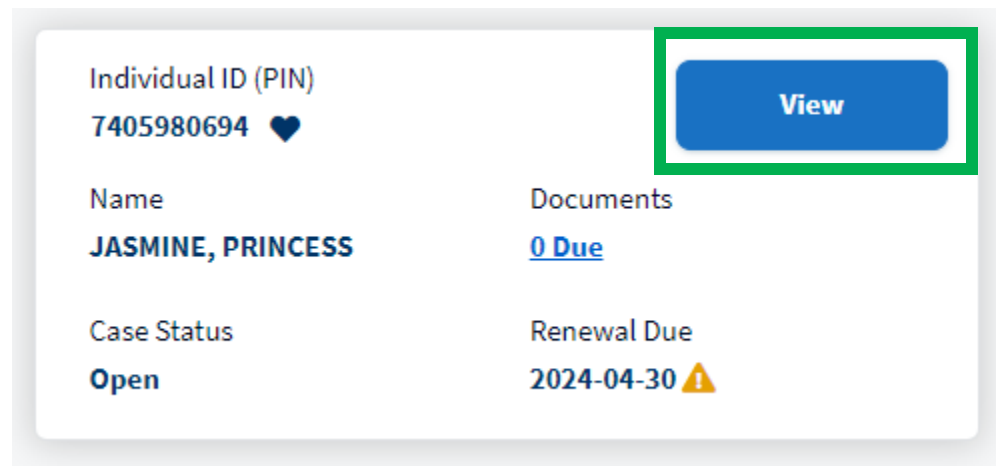


My Clients

Click on the **View Clients** button in the My Clients tile to view all the clients marked as a favorite.



All Favorited clients will appear in the results list along with high level client details, including the renewal date.




Clicking the View button will take you to the client's dashboard.



My Submissions

The My Submissions section allows you to see all applications you have submitted, the status of each, and any documents needed.

Click the View button on each application phase to see more application details.

 **My Submissions**

14 In Progress	View
18 Submitted	View
22 Received	View
2 Processed	View

[+ New Application](#)
[View My Submissions](#)
[View Documents Needed](#)



Results for each application will display and additional information is available by selecting the **View Details** for more information. You can also toggle between the different application phases.

IN PROGRESS

SUBMITTED

RECEIVED

PROCESSED

Results (2)

Application Number
[800220075](#)

View Details

Last Name
Jade

First Name
Ella

Application Status
 Processed

Case Number
5007226807

Application Number
[800215748](#)

View Details

Last Name
Smith

First Name
John

Application Status
 Processed

Case Number
5007092339

Any in progress applications can be resumed by clicking on the application number or the **Continue** button. You will be taken to the section in the application last updated.

IN PROGRESS

SUBMITTED

RECEIVED

PROCESSED

Results (29)

Application Number
[800220972](#)

Continue

Last Name
fghf

First Name
fh

Application Status
 In Progress

Start Date
 03/07/2025

[Remove Application](#)

Application Number
[720053545](#)

Continue

Last Name
STAFFORD

First Name
CASTIEL

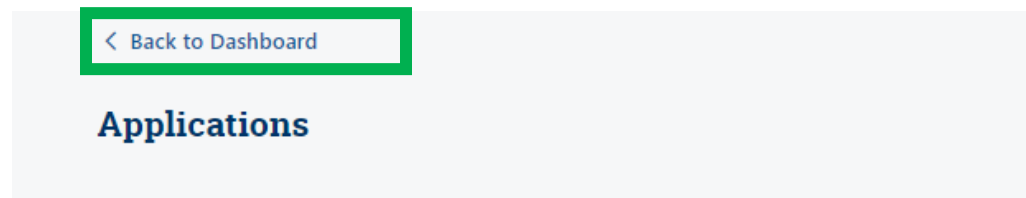
Application Status
 In Progress

Start Date
 03/07/2025

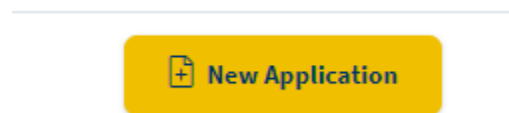
[Remove Application](#)



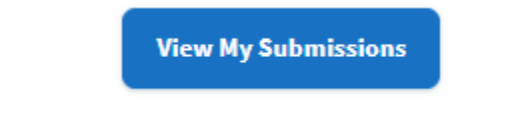
Click the Back to Dashboard button at the top of the screen to go back to your dashboard.



The yellow **New Application** button allows you to start a new application.



The **View My Submissions** button is another way to see all the submissions you have done.





The **View Documents Needed** button takes you to each case where additional documents are needed.

View Documents Needed

Click on the number under documents to be taken to a list of the specific documents needed.

Applications

Let's review your applications.

Type the applicant name, or the application number to filter the results.

Filter

Filter

IN PROGRESS

SUBMITTED

RECEIVED

PROCESSED

ALL

DOCUMENTS NEEDED

Results (6)

Case Number

[5007129640](#)

Last Name

GREG

First Name

KRIG

Application Status

Received

Documents

[5](#)

Case Number

[5007204412](#)

Last Name

OWENS GEORGE

First Name

MELINDA

Application Status

Received

Documents

[4](#)

Verification Requests

Upload Needed

Case 5007021385

☒ Overdue

**PROOF OF
SAVINGS/CHECKING/ETC.
BALANCE**

JONES SCOFIELD (41)

Upload

**PROOF OF UNITED
STATES CITIZENSHIP**

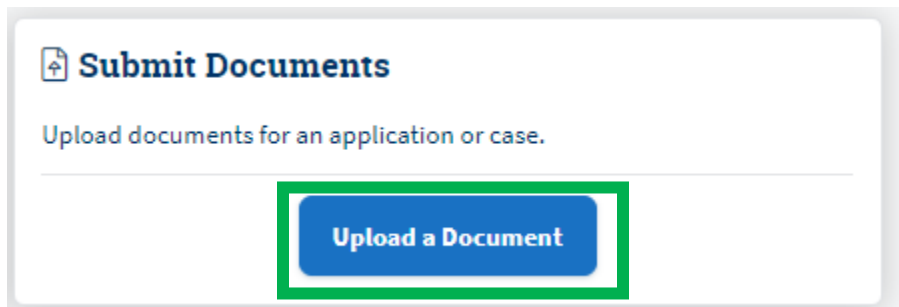
JONES SCOFIELD (41)

Upload



Submit Documents

Click the **Upload a Document** button to be taken to a Document Center screen to upload supporting documents for a specific case or application.



The Document Center landing page will display. The upload history for receipts of documents uploaded within the past year will be displayed. Each upload will have a status next to the Document Type.

Status Types:

- Received: Documents were uploaded and received
- Error: Documents uploaded failed to upload. Reason for the failure can be viewed on click of the "error" pill
- Pending: Document is in transit

Click the **Upload a Document** button to submit documents to either an application or case number. For files larger than 4MB click the **Upload Larger Documents** button.



Document Center

Upload History

Below are the receipts for the documents you've uploaded in the past year.

Document Type	Received
Hearing Request	
Applicant	Document ID
MXNX,RXBXRTX	230002100
Uploaded Date	Actions
10/16/2024	View Receipt
Document Type	Error
Financial Release Form	
Applicant	Document ID
FROXMXN-MMXTH,RXMXRX	230002099
Uploaded Date	Actions
10/16/2024	View Receipt
Document Type	Received
Housing and Utility Expenses	
Applicant	Document ID
MXNGRXTXRY,MXR'RXYNX	230002092
Uploaded Date	Actions
10/16/2024	View Receipt
Document Type	Pending
Financial Release Form	
Applicant	Document ID
MXNGRXTXRY,MXR'RXYNX	0
Uploaded Date	Actions
10/16/2024	View Receipt
Document Type	Pending
Hearing Request	
Applicant	Document ID
RXX,RXTRXCXX	230002079
Uploaded Date	Actions
10/15/2024	View Receipt



Submit Documents

Upload documents for an application or case.

UPLOAD A DOCUMENT

Submit Larger Documents

Upload documents that are larger than 4 MB

UPLOAD LARGER DOCUMENTS



Upon uploading, users will be taken to a confirmation screen. This screen can be displayed for any previously submitted documents by clicking on the “View Receipt” hyperlink as seen on the upload history page.

A screenshot of the MyACCESS web application showing a "Confirmation Receipt" page. The page has a dark blue header with the MyACCESS logo, navigation links (Home, Help & Resources), a language dropdown (English), and a user icon (CU). The main content area is white and contains a table of receipt details, a message to save the receipt, and two action buttons.

Date	02/11/2025
Time	11:33 am
Application Number	800213507
Person	OPL_KIL
File(s)	800213507_JCL.pdf
Document Type	Interim Contact Letter
Document Number	230002420

Text, email or print a copy of your receipt for your records.

☐ ✉ 🖨

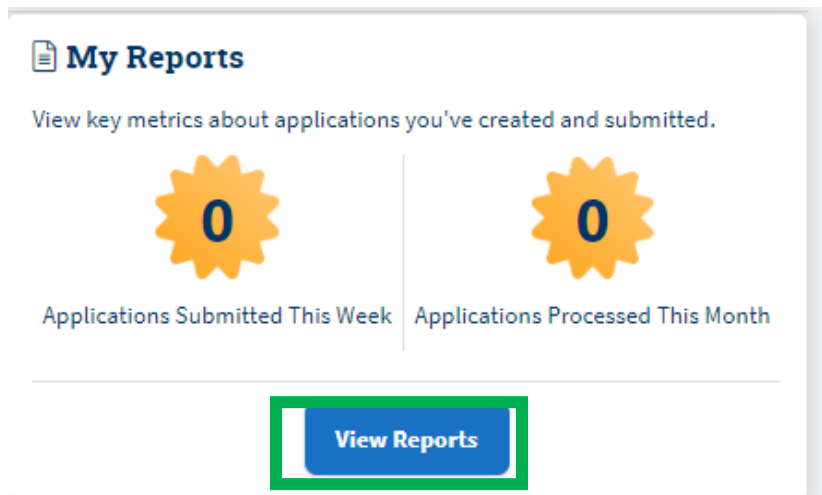
UPLOAD ANOTHER FILE

< DOCUMENT CENTER



My Reports

Click the **View Reports** button to view metrics about applications created and submitted.

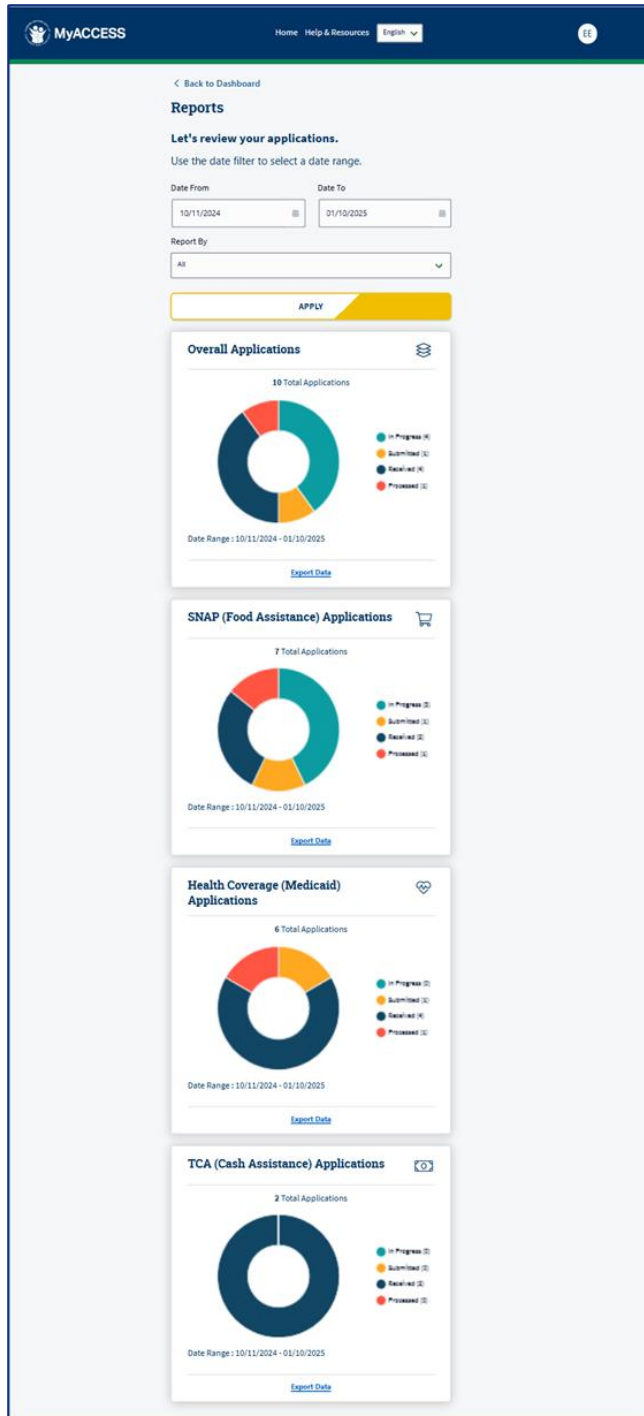


The **"Date From"** and **"Date To"** filter will display metrics about applications that fall within the date range requested.

The **"Report By"** dropdown will display metrics about applications by the report chosen.

The **"Apply"** button will load all application metric results matching the criteria inputted in the fields above.

Selecting the **"Export Data"** hyperlink under each category will export the data results in an excel file.






Referral Campaigns

A referral campaign is a way to create a unique URL to track applications submitted by Clients at Partner sites.


Examples:

- A public library can use their unique referral URL to track how many applications are submitted through their computer lab by having a campaign enabled on each machine.
- A Community Partner can send out an outreach email and track how many people are applying for benefits because of their outreach communications and activities.

Click **View Referral Campaigns** to create new referral campaigns and view reports/details on current and archived campaigns.

 **Referral Campaigns**

Manage your referral campaigns and export your campaign reports.

 **0** Applications submitted using a referral code this month.

[View Referral Campaigns](#)



Click the “**View Details**” button next to each campaign name to open campaign details.

[< Back to Dashboard](#)

Referral Campaigns

Campaigns

Reports

CREATE NEW CAMPAIGN

? [What is a Referral Campaign?](#) ▾

Type the name of the campaign to filter the results.

Filter

Campaign Status

☐ Active

☐ Archived

SEARCH

Campaign Name	<div>VIEW DETAILS</div>
New campaigns	
Campaign Start Date	Campaign Status
03/12/2025	✓ Active
Copy Referral URL	Download QR Code



Click the **Archive Campaign** button to archive a current campaign.

Referral Campaign

New campaigns

Campaign Details

Campaign Status
Active

Campaign Start Date
03/12/2025

 **ARCHIVE CAMPAIGN**

Share a Campaign Referral URL

Click on the **Copy Referral URL** button to copy the campaign URL to your clipboard. From here you can save this URL in your internet bookmarks, and/or share in other preferred communication methods.

Click on the **Download QR Code** button to download the QR code to your local device to distribute as necessary.

Now, let's share your referral URL!

Referral URL

<https://d35cswd9vb0yrx.cloudfront.net/r/45367378>

 **COPY REFERRAL URL**

Referral QR Code



 **DOWNLOAD QR CODE**



Create a New Campaign

Click on the **Create New Campaign** button to begin a new referral campaign.

[← Back to Dashboard](#)

Referral Campaigns

Campaigns

Reports

CREATE NEW CAMPAIGN

? What is a Referral Campaign?





Enter in information in the required fields. A preview of your referral campaign URL will be generated as in the image example below.

Once all campaign information has been entered, click the **Create Referral Campaign** button.

[< Back to Referral Campaigns](#)

Create New Referral Campaign

Campaign Name (required)

Marketing Outreach

This is the title of your referral campaign.

Campaign Start Date (required)

03/12/2025



This is the date we will start tracking applications submitted via this referral campaign.

Custom Referral Code (required)

Florida

This will be used to generate your referral URL.

Preview of Referral URL

<https://d35cswd9vb0yrx.cloudfront.net/r/Florida>

CREATE REFERRAL CAMPAIGN



From here you will be able to copy the URL code and/or download the referral QR code for distribution.



You created your referral campaign!

Now, let's share your referral URL!

Referral URL

<https://d35cswd9vb0yrx.cloudfront.net/r/Florida>



COPY REFERRAL URL

Referral QR Code



DOWNLOAD QR CODE

You can access your referral code URL and QR code from your Referral Code Campaigns page at any time.

BACK TO REFERRAL CAMPAIGNS



Organization Information

Click the **View Organization Information** button to be taken to another page to select which additional details about the organization to view.

? My Organization Information

View Organization Information

Click on the Organization radio button to view/edit details of the organization.

What information would you like to review?



Organization




Locations



Staff



 MyACCESS

Home Applications ▾ Reports Help & Resources English ▾

CU

[← Back to Gatepost](#)

Access Affordable Benefits

Type: Community Partner

Organization's Full Legal Name (required)

Access Affordable Benefits

What is your organization's website address?

accessaffordablebenefits.com

If your organization does not have a website, you may provide a link to your social media site(s).

What is your organization's business structure? (required)

Not for profit - community based ▾

Customers Served

General Public ▾

EDP (required)

No ▾

Organization Impact

Organization's mission or purpose statement (required)

Provided affordable benefits

472 Characters Remaining

Open to the General Public

Yes ▾

Are you a medical facility?

No ▾

Florida counties your organization serves (required)

Baker x ▾

Referral services where your organization is listed (required)

Florida 2-1-1 x ▾

SAVE



The following fields are not editable, and you must contact DCF for changes. See the Resource section for DCF contact information.

- Organization's Full Legal Name
- Customers Served
- EDP
- Open to the General Public?
- Are you a Medical Facility?

Click on the Locations radio button to view/edit details of the organizations location(s) or to add a location.

What information would you like to review?

<input type="radio"/>	Organization
<input checked="" type="radio"/>	Locations
<input type="radio"/>	Staff

Click the **Add Location** button to add a new location.

Select the specific organization location under "General Information" to view/update location information.

The screenshot shows the MyACCESS portal interface. At the top, there's a navigation bar with 'Home', 'Applications', 'Reports', 'Help & Resources', and a language dropdown set to 'English'. A user icon 'CU' is in the top right. The main content area has a 'Back to Gatepost' link. The title is 'Access Affordable Benefits, LLC'. Below it, a 'Please select a Location' dropdown menu shows 'Access Affordable Benefits' with a checkmark. A green box highlights the '+ Add Location' button. Underneath, the 'General Information' section is highlighted with a green box, displaying details for 'Access Affordable Benefits, LLC': '1234 Sample Street, Jacksonville, FL 32201', 'County: Duval', and 'Phone Number: 7271113333'.

Notes:

Up to two points of contacts can be added for each location. Contact DCF if more staff need to be added. See the Resource section for DCF contact information.

Point of Contact 1's "Contact Type" field will be defaulted to "Admin" and is not editable, as each location must have at least 1 admin.

Point of Contact 2 can be either an admin or non-admin.

Users who are assigned contact type as "Admin" will be assigned as "Partner Managers".

The following fields are not editable, and you must contact DCF for changes. See the Resource section for DCF contact information.

- Location Name
- Access Level
- Email Address
- Contact Information
- Display to Public

Click **Save** to save any changes made. New locations must be approved by DCF before they are visible to the public.



MyACCESS

Home Applications ▾ Reports Help & Resources English ▾ CU

[← Back to Location Search](#)

Access Affordable Benefits, LLC

☐ Display to Public

General Information

Location Name (required)

Access Level

Phone Number

Fax Number

Street Address (required)

Suite / Apartment Number (required)

City (required)

State

Zip Code (required)

County (required)

Is your organization's mailing address different from the address above? (required)

Transportation Instructions

Parking Instructions

What is your organization's website address?

If your organization does not have a website, you may provide a link to your social media site(s).

Email Address



Contact Information



Point of Contact 1

First Name *(required)*

Jane

Last Name *(required)*

Hill

Phone Number *(required)*

(727) 123-4444

Email Address *(required)*

cpuat2.test2@test.com

Contact Type *(required)*

Admin



Point of Contact 2

First Name *(required)*

Ham

Last Name *(required)*

Hill

Phone Number *(required)*

(727) 888-8999

Email Address *(required)*

ESSRep_SIT2@test.com

Contact Type *(required)*

Non-Admin



Resources



Primary Service Provided

Select an Option



Application Assistance Services Provided

Select an Option



Languages Spoken

Select an Option





Days and Hours of Operations

☐ Call for Appointment

Sunday

Closed ☐

Monday

Closed ☐

Tuesday

Closed ☐

Wednesday

Open ☒

Open Time (required)

10:00AM

Closed Time (required)

10:00PM

Open Time

XX:XX AM/PM

Closed Time

XX:XX AM/PM

Thursday

Open ☒

Open Time (required)

12:00AM

Closed Time (required)

12:00PM

Open Time

XX:XX AM/PM

Closed Time

XX:XX AM/PM

Friday

Closed ☐

Saturday

Closed ☐

Save



Click on the staff radio button to view/edit details of the staff at each organization location.

What information would you like to review?

<input type="radio"/>	Organization
<input type="radio"/>	Locations
<input checked="" type="radio"/>	Staff

Click **search** after entering the criteria seen in the image below. Note the required fields.

The screenshot shows the "MyACCESS" web application interface. At the top, there is a navigation bar with "Home", "Applications", "Reports", "Help & Resources", and a language dropdown set to "English". A user profile icon labeled "CU" is in the top right. Below the navigation bar, a breadcrumb link "< Back to Gatepost" is visible. The main heading is "- Staff". The form contains several input fields: "First Name", "Last Name", "Email", and "Phone Number" (with a placeholder "(000) XXX-XXXX"). There are two dropdown menus: "Status (required)" with "Active" selected, and "Locations (required)" with "All" selected. At the bottom of the form, a blue "SEARCH" button is highlighted with a green rectangular border.



General information for each staff from the specific search results will be displayed.

Select the staff name to view/edit details of that staff member.

Results(1)

[JohnNew CramerNew](#)
John2.cramer2New@abc.com
Status: Active

To deactivate a staff member, press the toggle button to change from active to inactive.

Contact type is not editable, contact DCF to make role changes. See the Resource section for DCF contact information.

Click Save to save any changes made for a particular staff member.

If new staff need to be added, contact DCF. See the Resource section for DCF contact information.

MyACCESS Home Applications Reports Help & Resources English CU

< Back to Staff

Staff Details

☒ Active

First Name (required)
Jane

Last Name (required)
Hill

Email Address (required)
cpuat2.test12@test.com

Phone Number (required)
(727) 123-3333

Contact Type (required)
Admin

Location (required)
Access Affordable Benefits

SAVE



Staff Applications

Click on the **View Staff Applications** button to view details about applications submitted by staff members

Staff Applications

Manage your staff's applications.

View Staff Applications

Use the Staff Applications screen to find applications submitted by staff. Organize results by location name, staff name, and/or report type.

The "Date From" and "Date To" displays metrics about applications that staff completed within the date range requested.

Select the "Apply" button to display all results matching the criteria inputted in the fields.

Select the "Export Data" hyperlink under each category to export the data results in an excel file.



Back to Dashboard

Staff Applications

Location Name

All

Staff Name

All

Report Type

Date From

12/29/2024

Date To

01/28/2025

Status

APPLY

Overall Applications

2 Total Applications

undefined (1)

undefined (2)

undefined (1)

undefined (2)

undefined (2)

undefined (2)

Date Range: 12/29/2024 - 01/28/2025

Export Data

SNAP (Food Assistance) Applications

2 Total Applications

undefined (1)

undefined (2)

undefined (1)

undefined (2)

undefined (2)

undefined (2)

Date Range: 12/29/2024 - 01/28/2025

Export Data

Health Coverage (Medicaid) Applications

We couldn't find any results for this search. Try updating your filters.

TCA (Cash Assistance) Applications

We couldn't find any results for this search. Try updating your filters.

Nonrelative Caregiver Applications

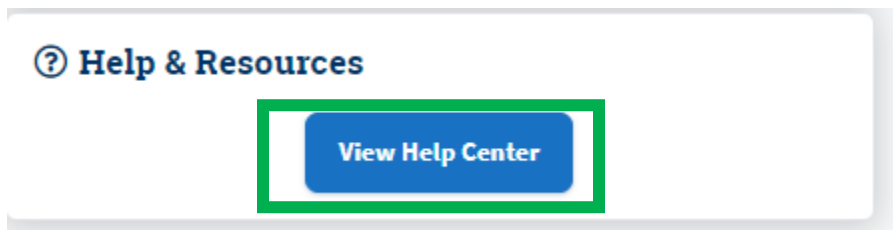
We couldn't find any results for this search. Try updating your filters.



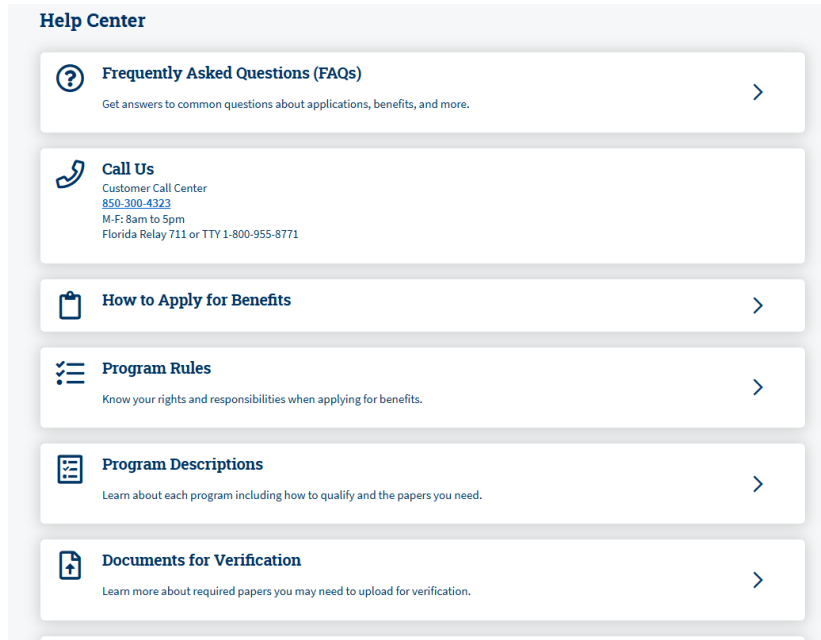
Help & Resources

The Help Center page provides users with information and guidance on a range of important topics. It includes a list of frequently asked questions, information on how to apply for benefits, and relevant program information.

To navigate to the Help Center from the dashboard, click on the **View Help Center** button on the Help & Resources tile.



The Help Center page includes several help areas. Click on the tiles to access the corresponding guidance.





Click **Back to Homepage** to navigate back to the dashboard.

BACK TO HOMEPAGE

Resources

To add new staff to an organization, modify non editable organization fields, or adjust staff contact types, contact DCF.

Community Partner and Assistance sites should email hqw.ess.partner@myflfamilies.com

ESS Representative or EDP Partners should email HQW.ESS.Representatives@myflfamilies.com

Contact the DCF Help Desk at 850-487-9400 if you experience any system (including login) issues.

Note:

The DCF Help Desk should be reserved for partners experiencing system issues. Help Desk agents will not be able to provide additional case/application status details.