Partner Manager Role User Guide

Contents

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.

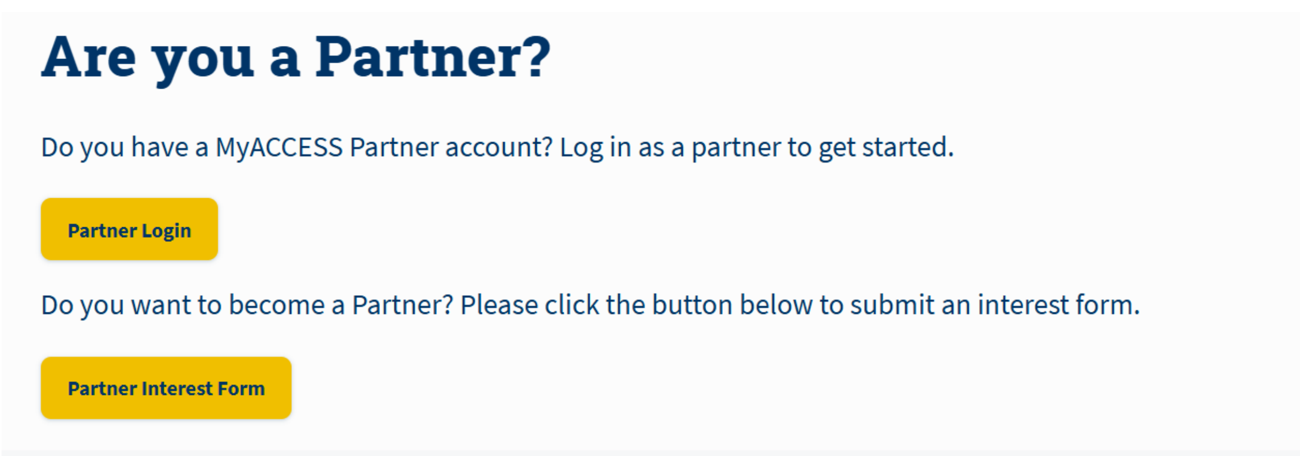
- Manage organization locations:
    - Add more locations for an organization if the organization has multiple locations but one parent organization.

- 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.



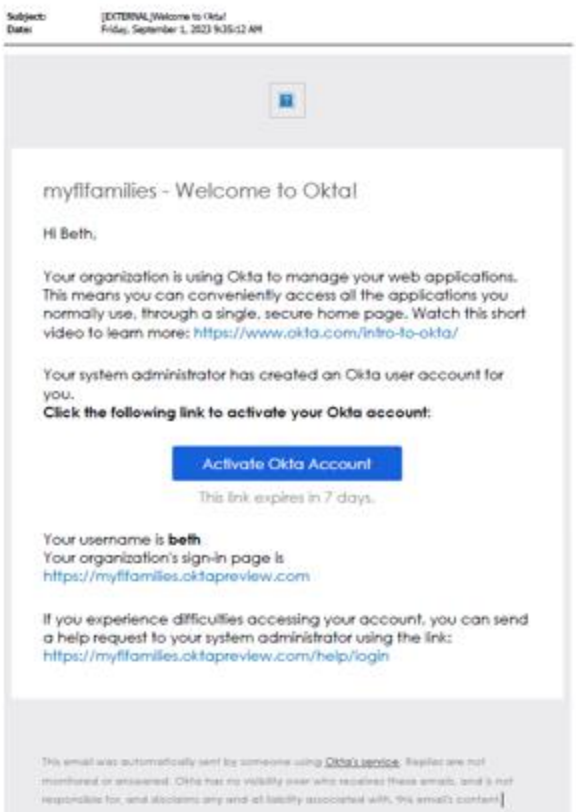
3. Accept Rights, Responsibilities, HIPAA Agreement and Important Information (terms and conditions) and you will navigate to the Partner Manager dashboard.

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:



Subject: [EXTERNAL]Welcome to Okta!
Date: Friday, September 1, 2023 9:35:12 AM

myflfamilies - Welcome to Okta!

Hi Beth,

Your organization is using Okta to manage your web applications. This means you can conveniently access all the applications you normally use, through a single, secure home page. Watch this short video to learn more: https://www.okta.com/intro-to-okta/

Your system administrator has created an Okta user account for you.
Click the following link to activate your Okta account:

Activate Okta Account

This link expires in 7 days.

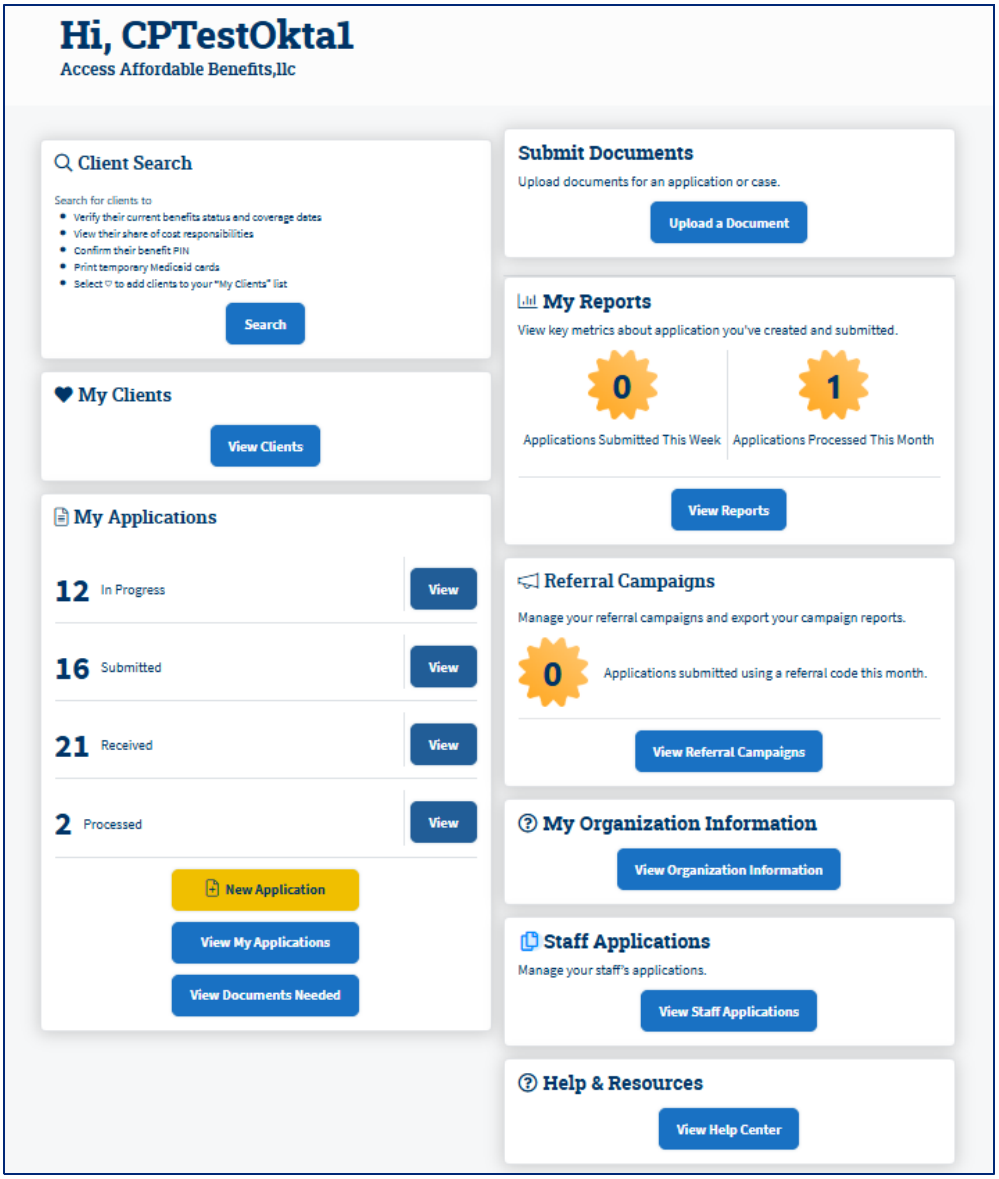
Your username is **beth**
Your organization's sign-in page is
https://myflfamilies.oktapreview.com

If you experience difficulties accessing your account, you can send a help request to your system administrator using the link:
https://myflfamilies.oktapreview.com/help/login

This email was automatically sent by someone using Okta's service. Replies are not monitored or answered. Okta has no visibility over who receives these emails, and is not responsible for, and disclaims any and all liability associated with, this email's content.

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.

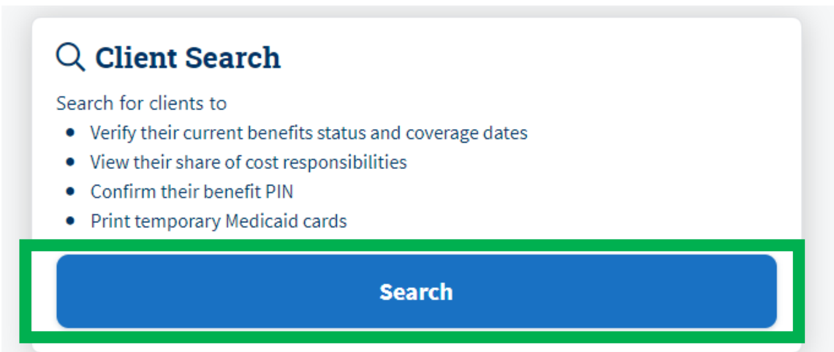
Partner Manager Dashboard



Client Search

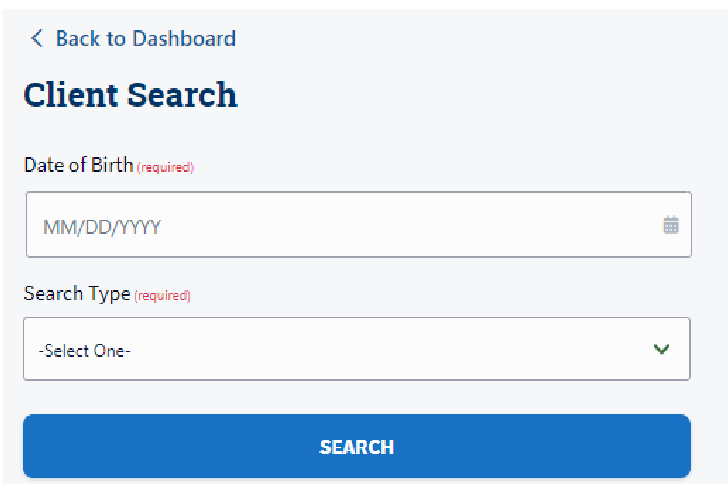
The Client Search functionality allows Partners to locate their client's information to carry out activities on their behalf.

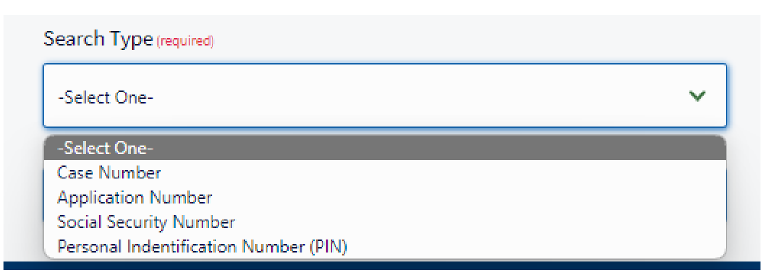
Note: You must have prior authorization from clients to access their data. You must have either a Partner View Release form or Authorized Representative form on file from the client.



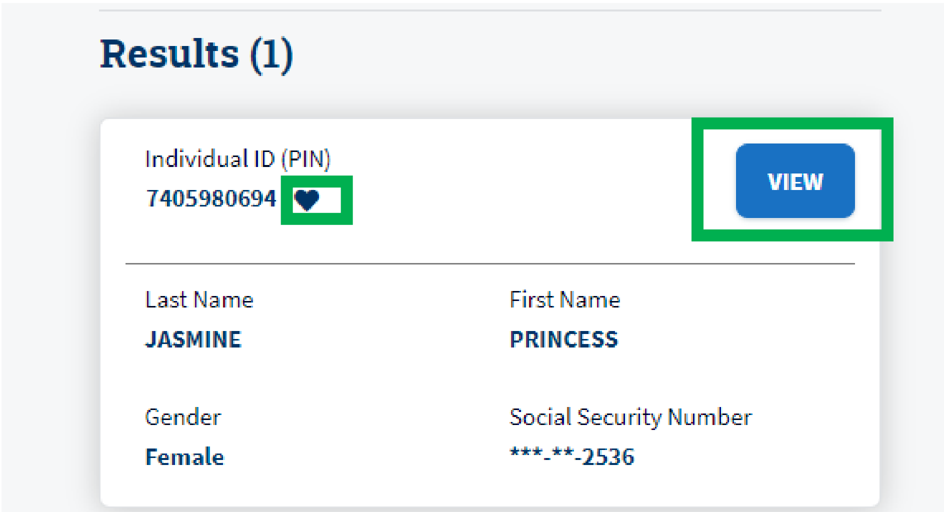
Click on the **Search** button in the Client Search tile of the dashboard.

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





From the search results you have two options.



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.

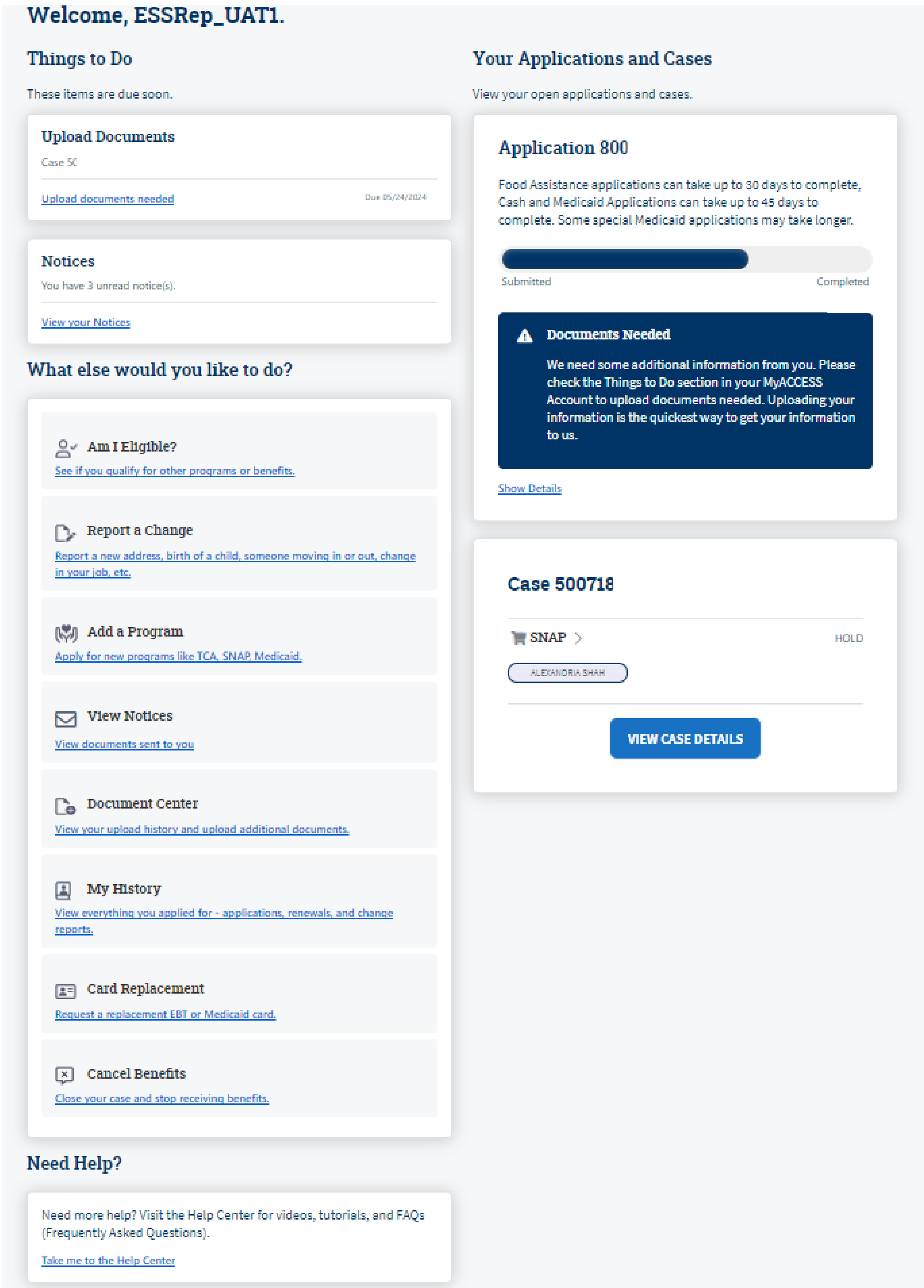
Click the **View** button to view the client dashboard. This will allow you to view the clients’ dashboard the same way the client would see it if they were logged in. You will not be required to link the case or sign in with the client’s email address.

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.

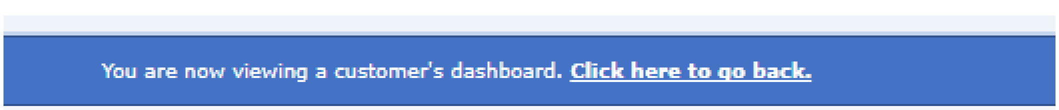
Client Dashboard Example:



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

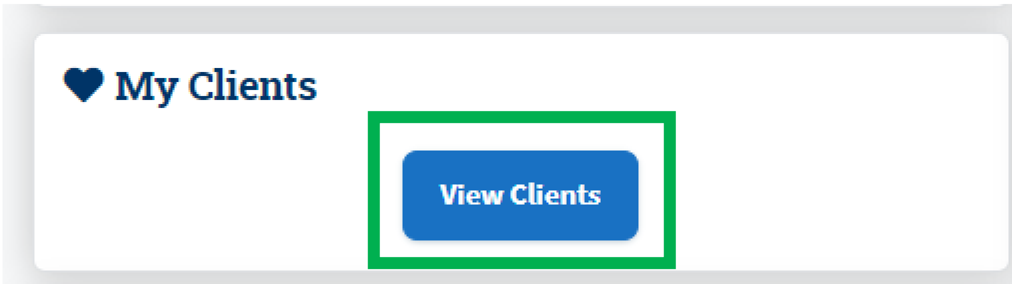
- **Things to Do**
  Items such as the ones listed below will appear here.
  - Unfinished applications
    - Note: if a client has started an application, you will not see the finish application tile under 'things to do' – only the client will see that. If you as a representative start an application 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.

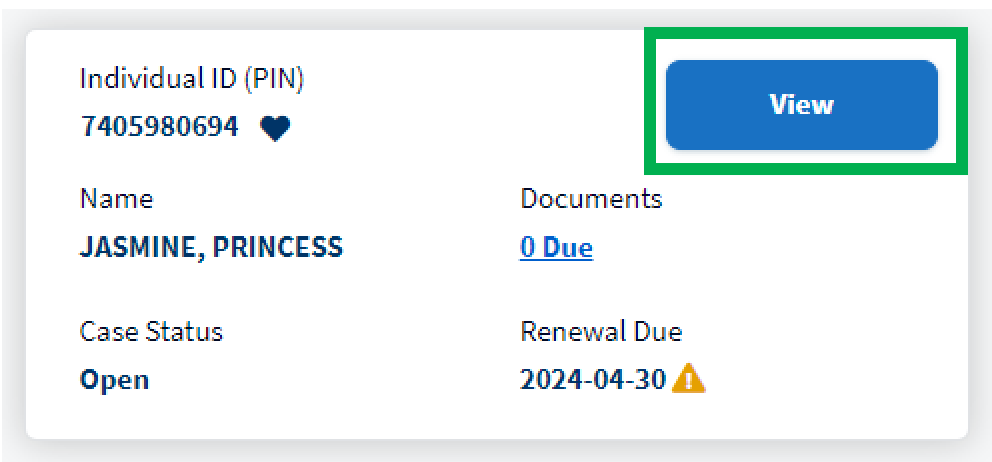


My Clients

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.

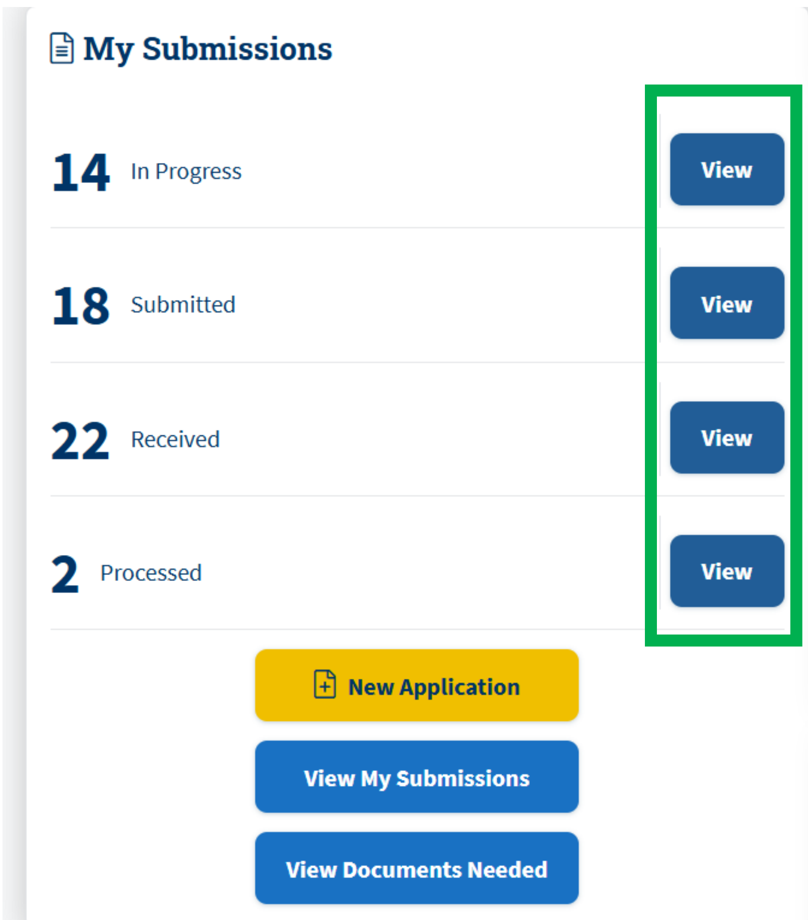


Clicking the View button will take you to the client's dashboard.

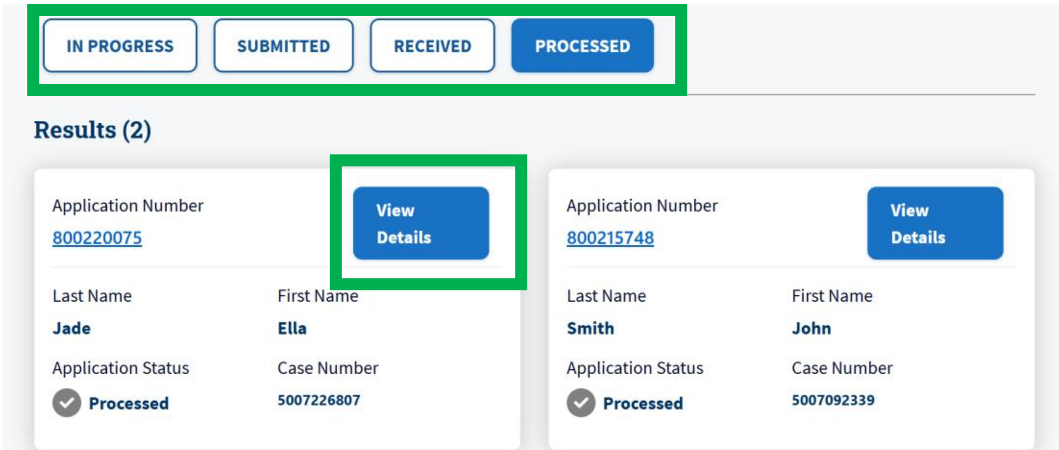
My Submissions

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

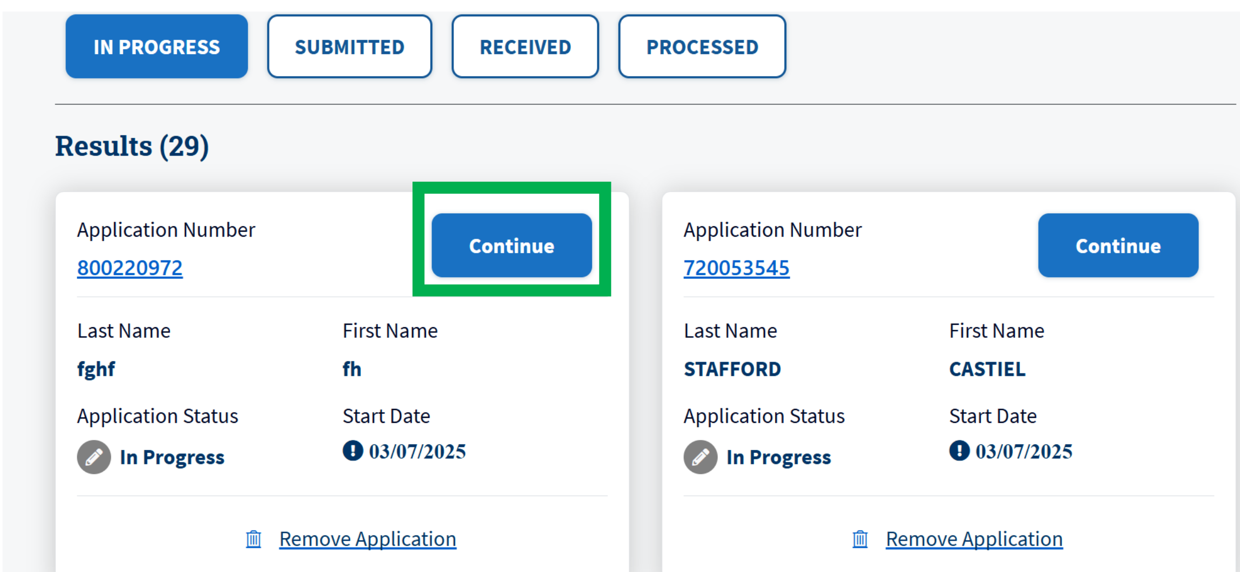
Click the View button on each application phase to see more application details.



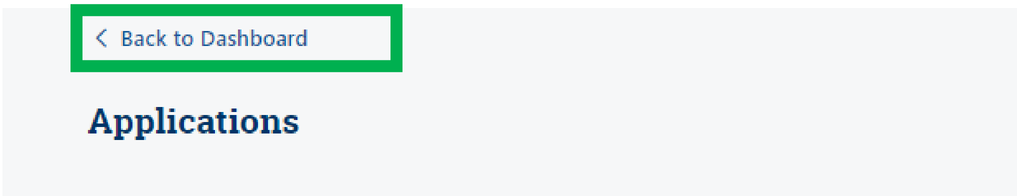
Results for each application will display and additional information is available by selecting the **View Details** for more information. You can also toggle between the different application phases.



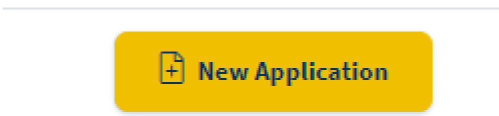
Any in progress applications can be resumed by clicking on the application number or the **Continue** button. You will be taken to the section in the application last updated.



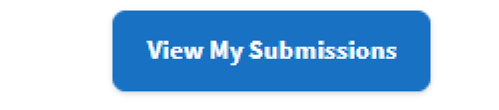
Click the Back to Dashboard button at the top of the screen to go back to your dashboard.



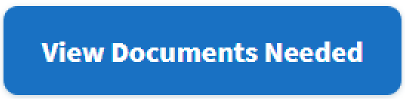
The yellow **New Application** button allows you to start a new application.



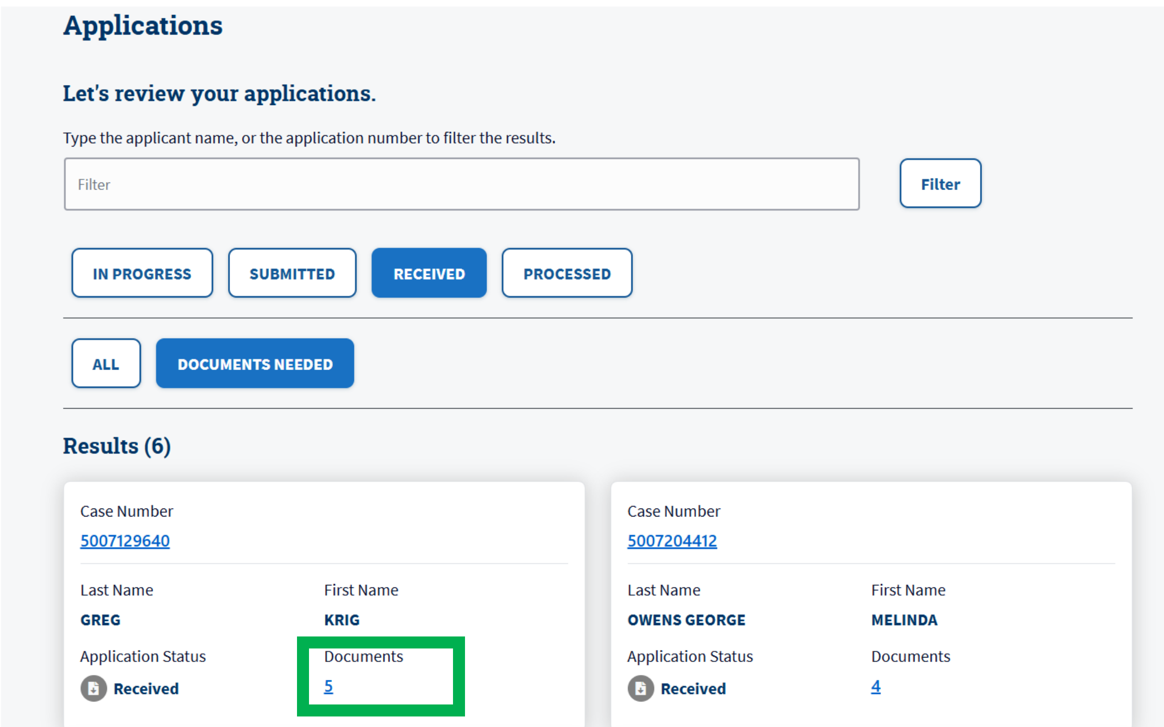
The **View My Submissions** button is another way to see all the submissions you have done.

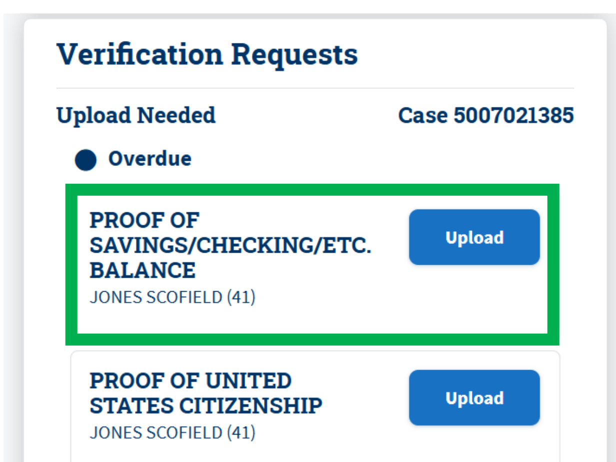


The **View Documents Needed** button takes you to each case where additional documents are needed.



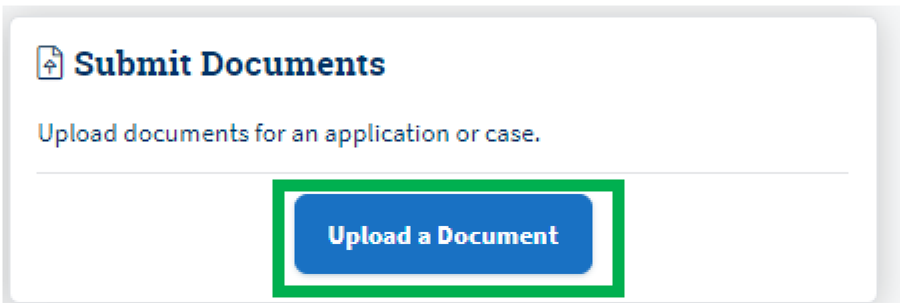
Click on the number under documents to be taken to a list of the specific documents needed.





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.

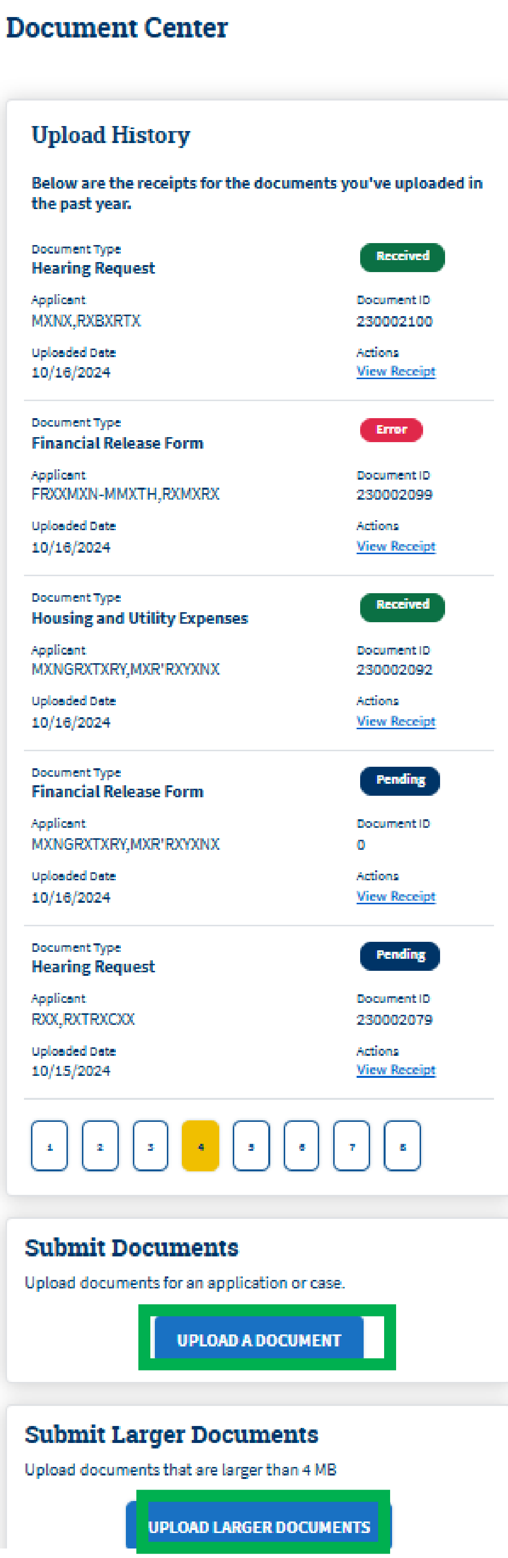


The Document Center landing page will display. The upload history for receipts of documents uploaded within the past year will be displayed. Each upload will have a status next to the Document Type.

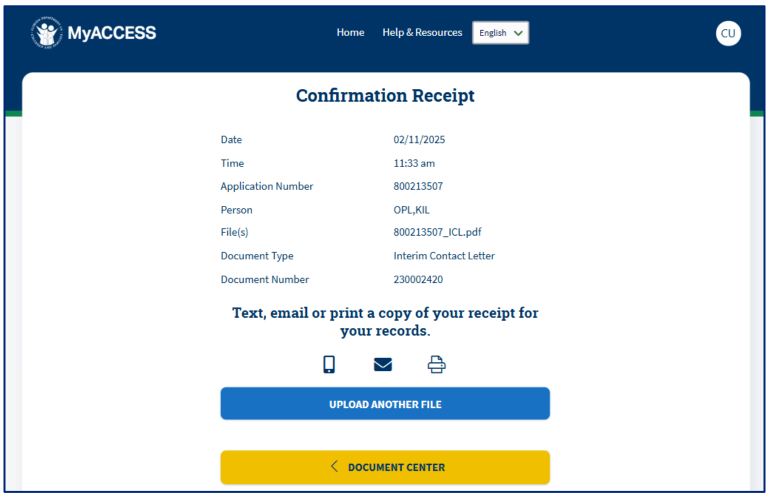
Status Types:

- 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.

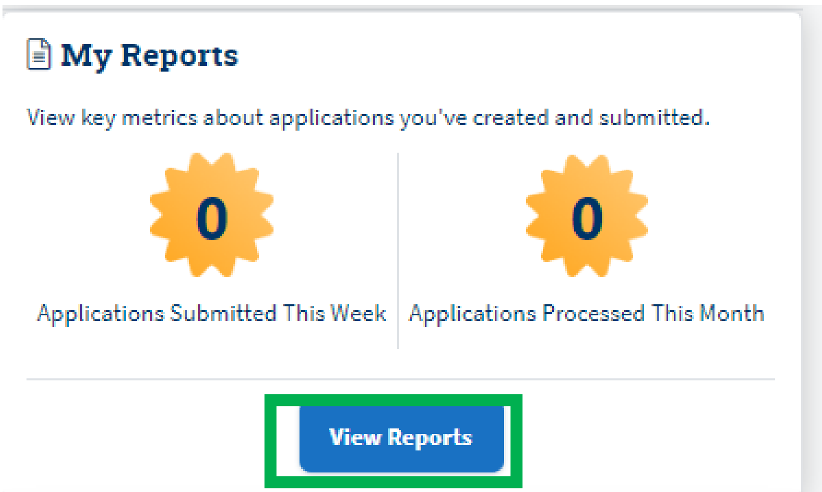

Document Center
Upload History
Below are the receipts for the documents you've uploaded in the past year.
Document Type
Hearing Request
Received
Applicant
MXNX,RXBXRTX
Document ID
230002100
Uploaded Date
10/16/2024
Actions
View Receipt
Document Type
Financial Release Form
Error
Applicant
FRXXMXN-MMXTH,RXMXRX
Document ID
230002099
Uploaded Date
10/16/2024
Actions
View Receipt
Document Type
Housing and Utility Expenses
Received
Applicant
MXNGRXTXRY,MXR'RXYXNX
Document ID
230002092
Uploaded Date
10/16/2024
Actions
View Receipt
Document Type
Financial Release Form
Pending
Applicant
MXNGRXTXRY,MXR'RXYXNX
Document ID
0
Uploaded Date
10/16/2024
Actions
View Receipt
Document Type
Hearing Request
Pending
Applicant
RXX,RXTRXCXX
Document ID
230002079
Uploaded Date
10/15/2024
Actions
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.



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.


MyACCESS
Home
Help & Resources
English
Back to Dashboard
Reports
Let's review your applications.
Use the date filter to select a date range.
Date From
10/11/2024
Date To
01/10/2025
Report By
All
APPLY
Overall Applications
10 Total Applications
Date Range : 10/11/2024 - 01/10/2025
Export Data
SNAP (Food Assistance) Applications
7 Total Applications
Date Range : 10/11/2024 - 01/10/2025
Export Data
Health Coverage (Medicaid) Applications
6 Total Applications
Date Range : 10/11/2024 - 01/10/2025
Export Data
TCA (Cash Assistance) Applications
2 Total Applications
Date Range : 10/11/2024 - 01/10/2025
Export Data

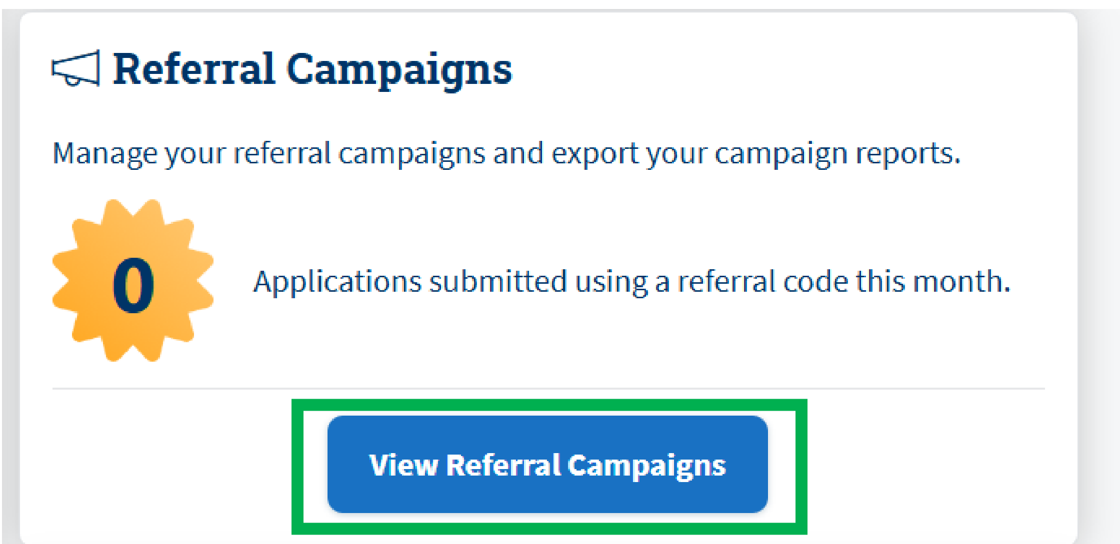
Referral Campaigns

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

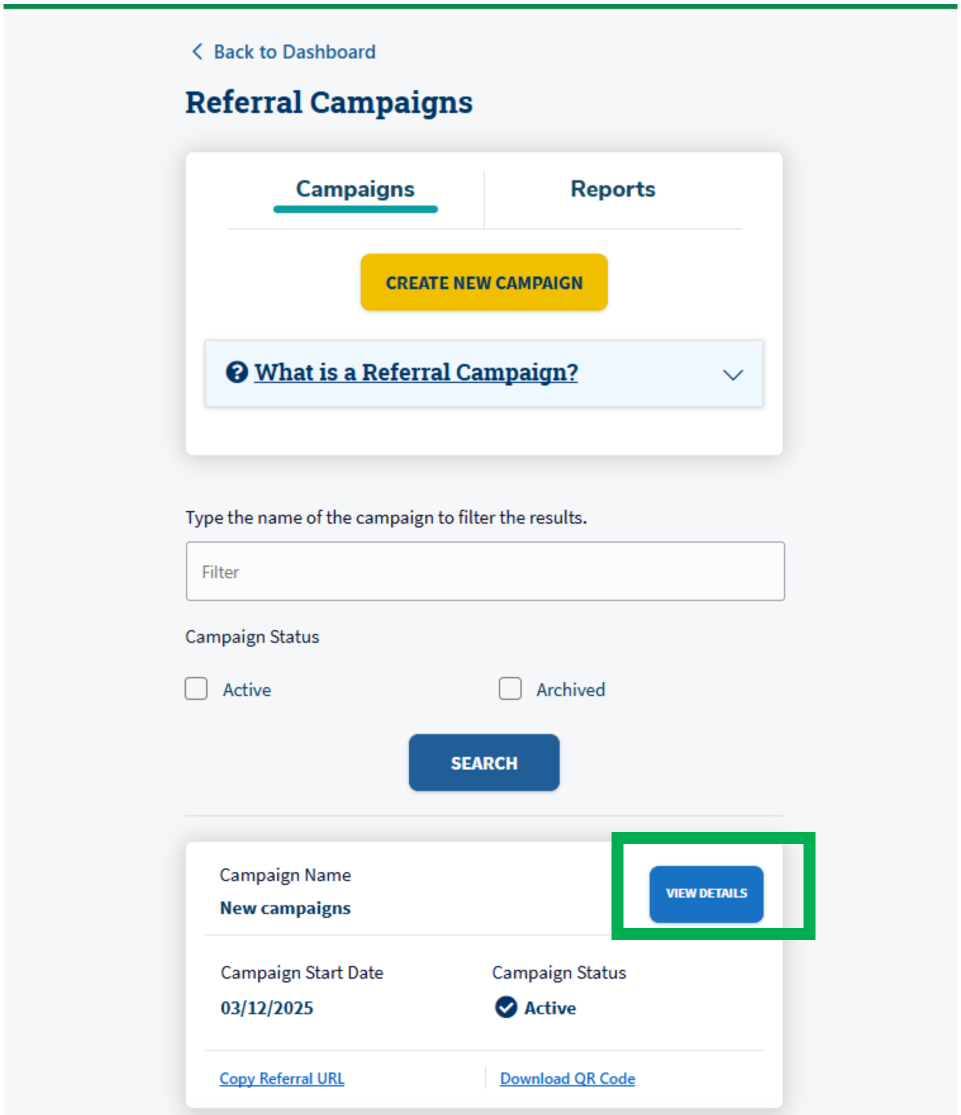
Examples:

- 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.

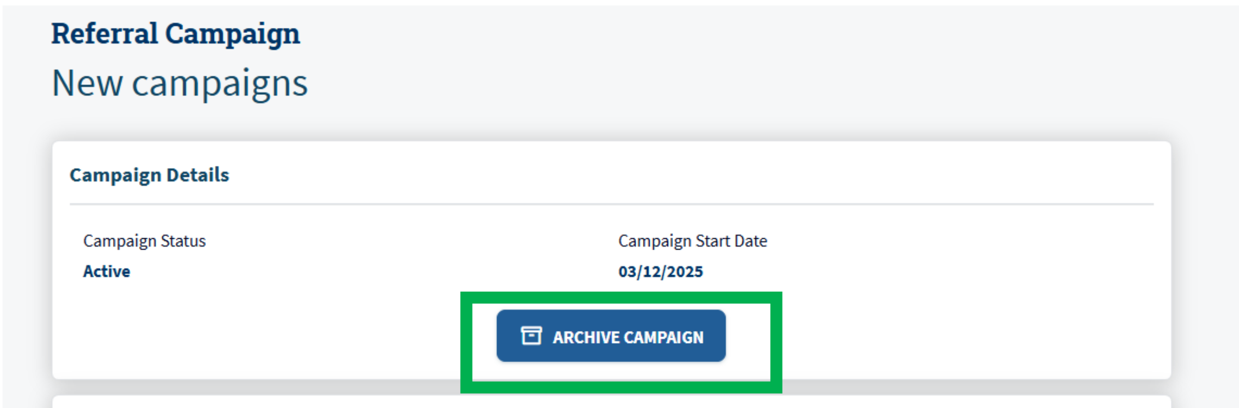
Click **View Referral Campaigns** to create new referral campaigns and view reports/details on current and archived campaigns.



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



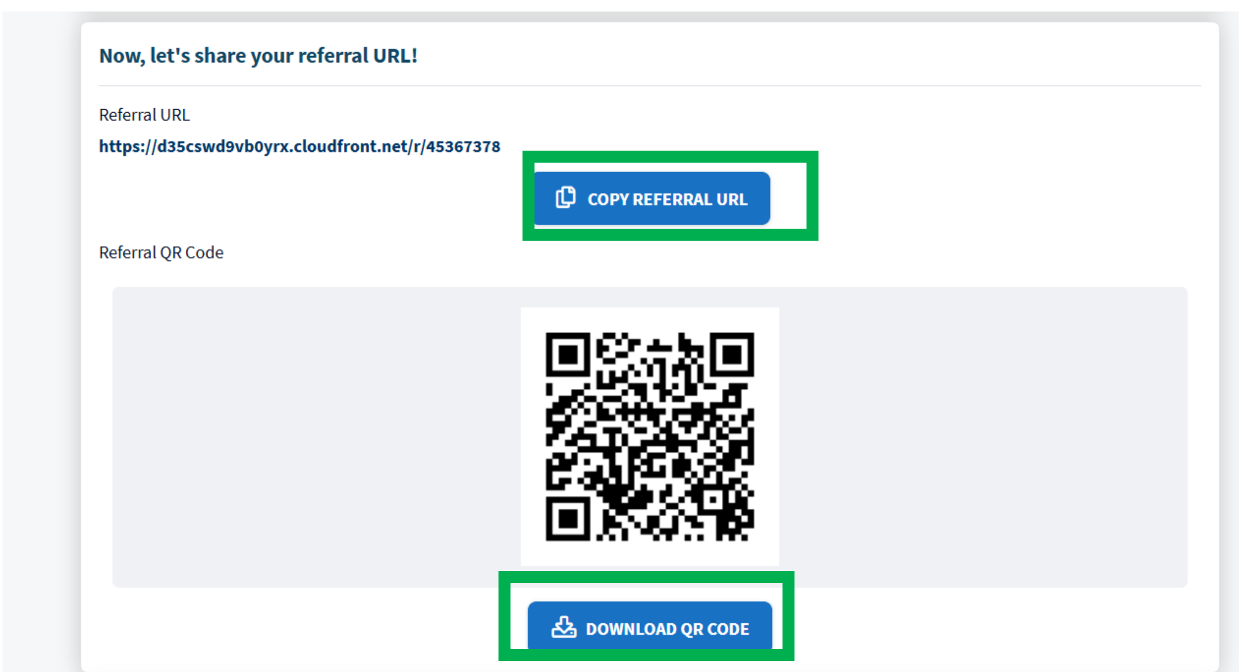
Click the **Archive Campaign** button to archive a current campaign.



Share a Campaign Referral URL

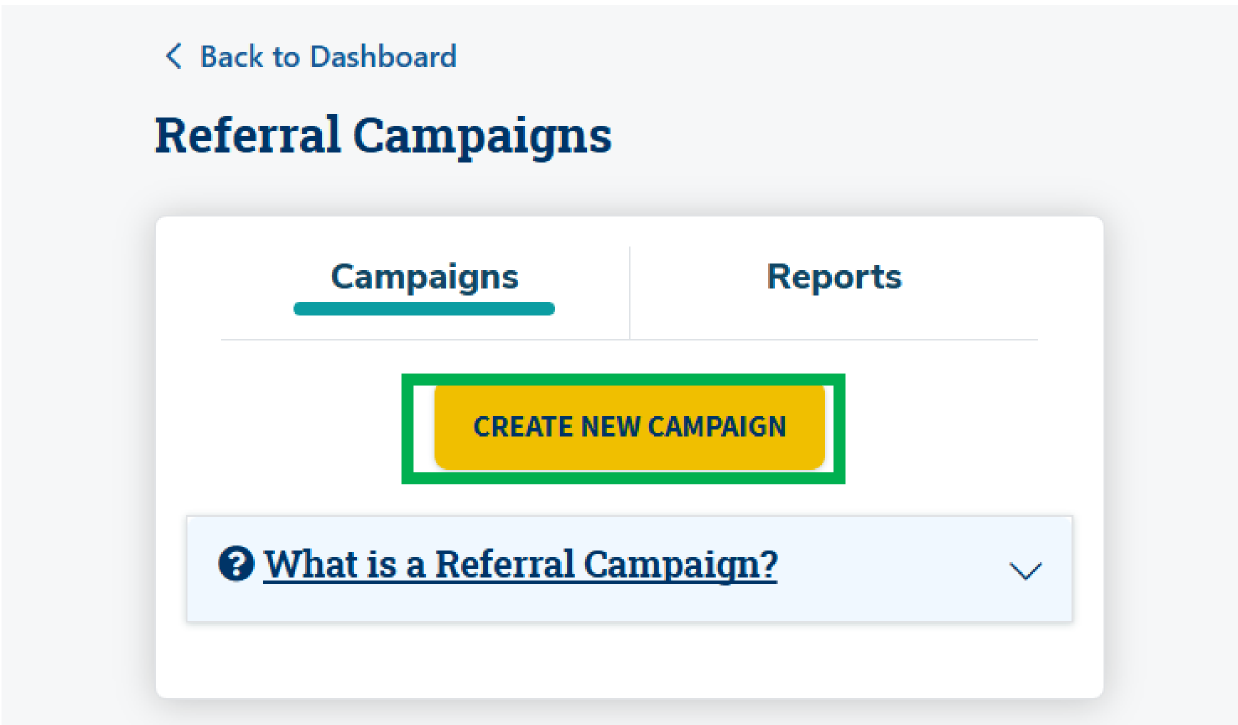
Click on the **Copy Referral URL** button to copy the campaign URL to your clipboard. From here you can save this URL in your internet bookmarks, and/or share in other preferred communication methods.

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



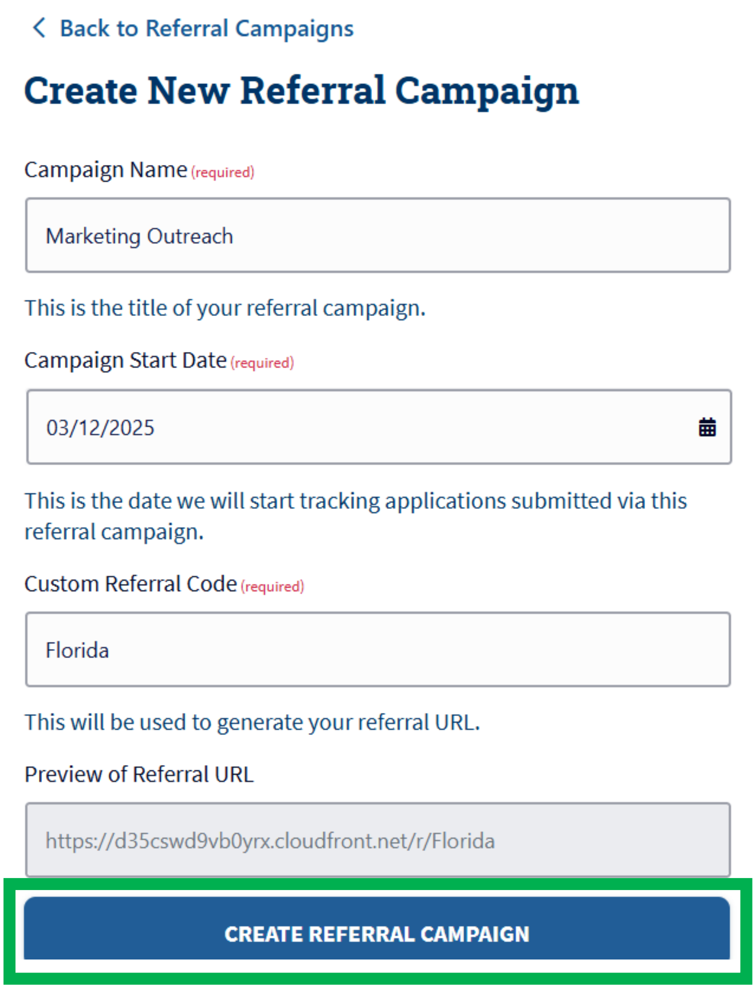
Create a New Campaign

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

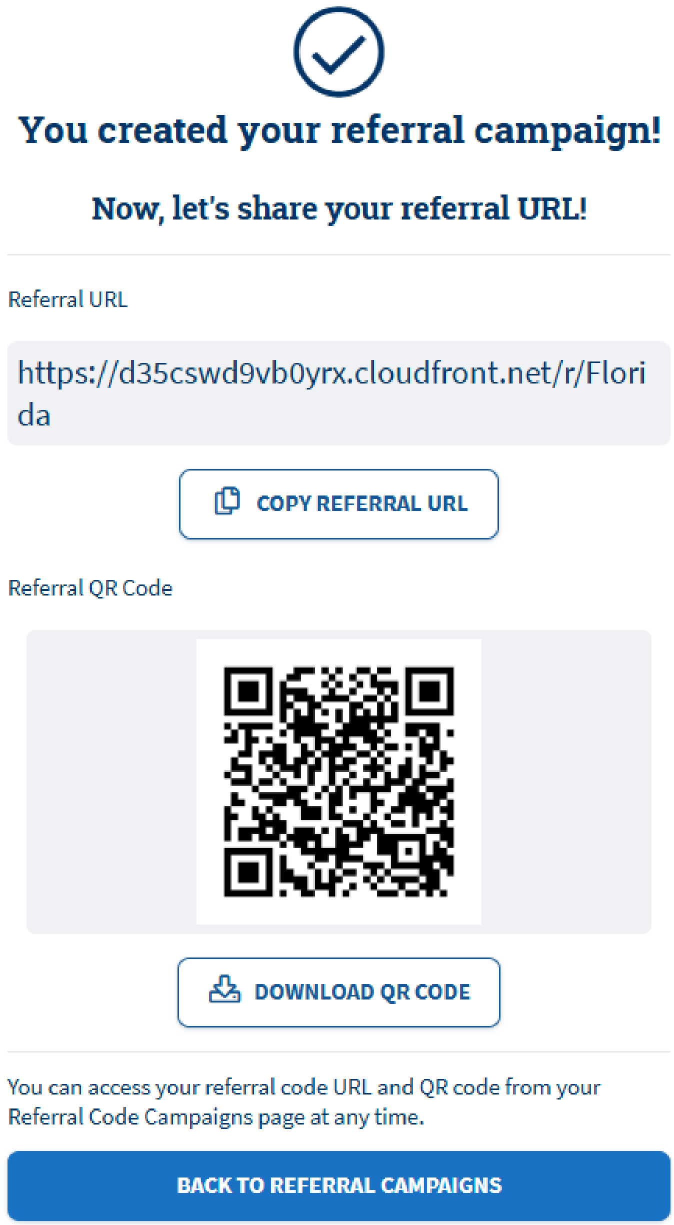


Enter in information in the required fields. A preview of your referral campaign URL will be generated as in the image example below.

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

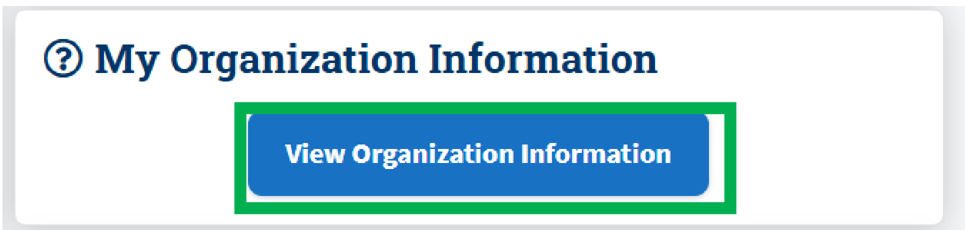


From here you will be able to copy the URL code and/or download the referral QR code for distribution.

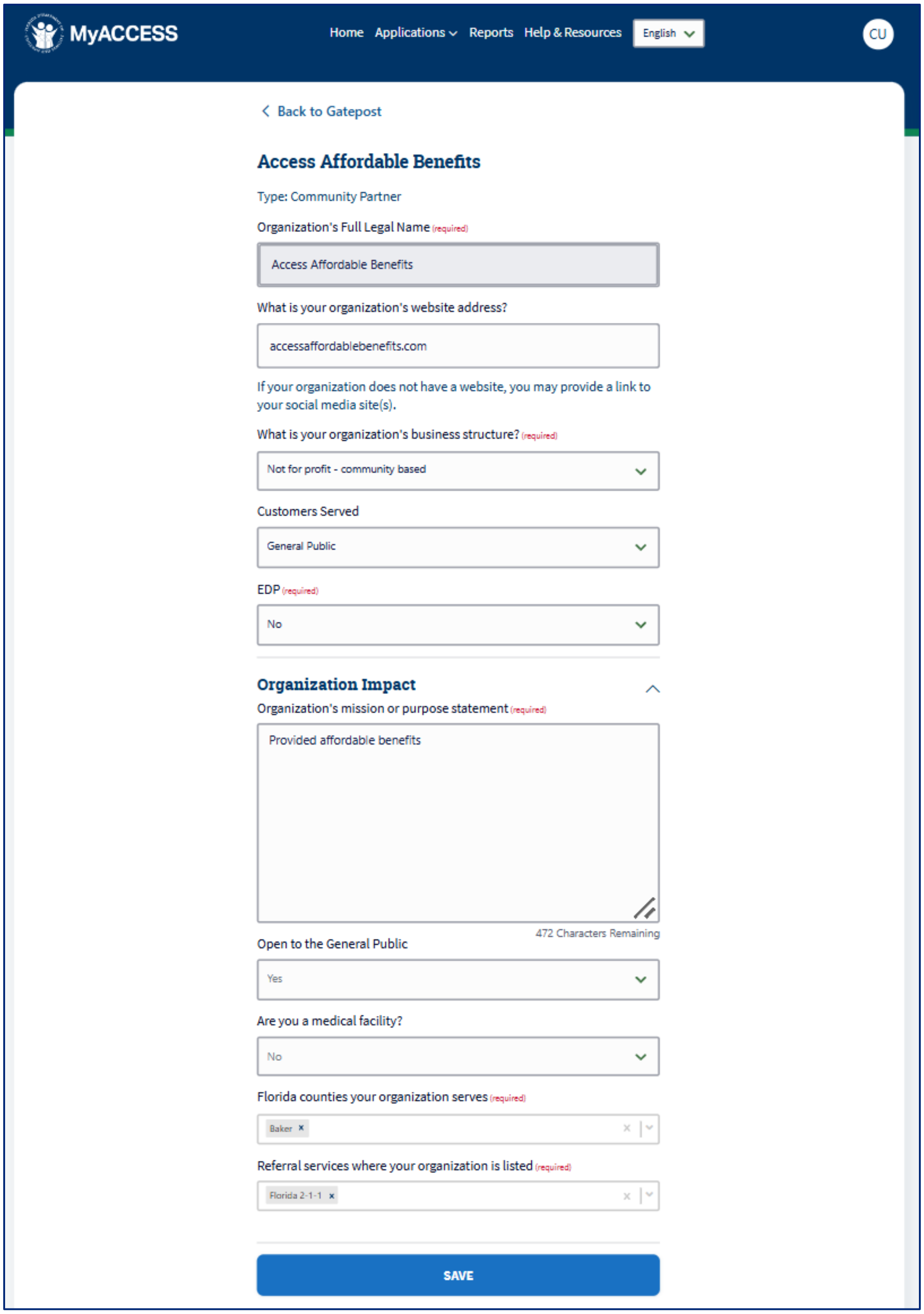


Organization Information

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



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


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
Referral services where your organization is listed (required)
Florida 2-1-1
SAVE

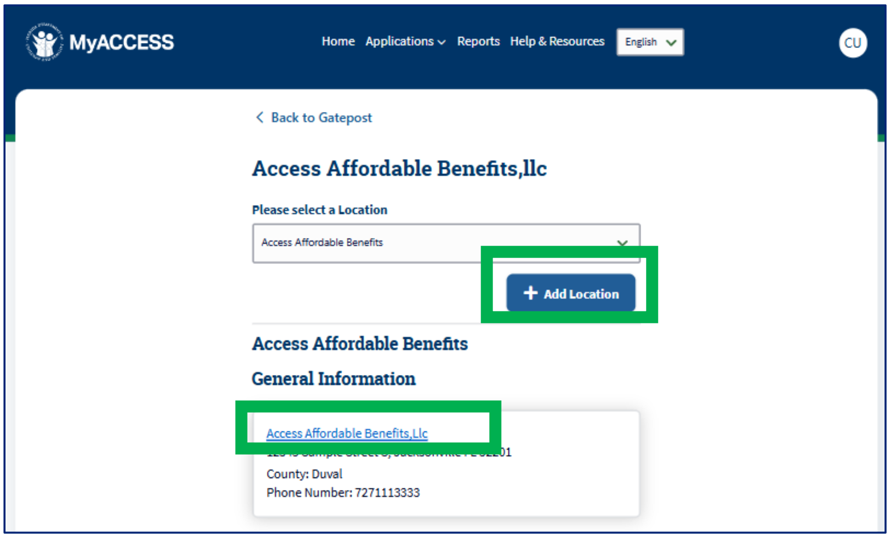
The following fields are not editable, and you must contact DCF for changes. See the Resource section for DCF contact information.

- 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.

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

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



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.

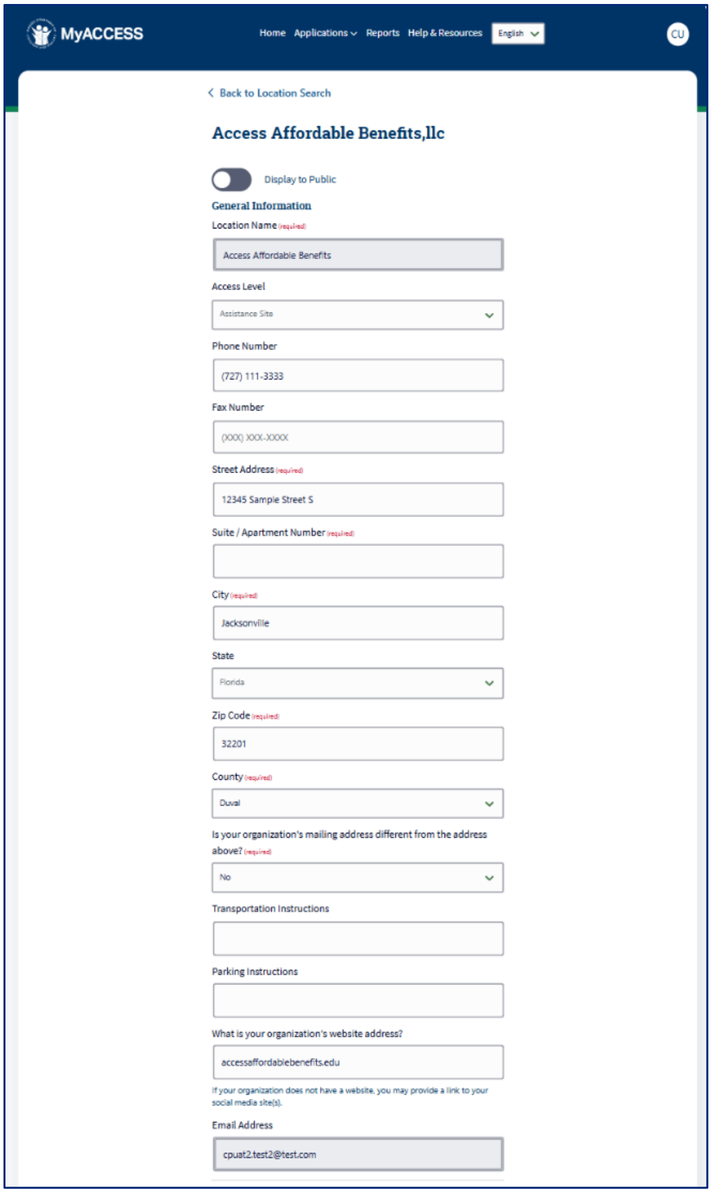
Point of Contact 2 can be either an admin or non-admin.

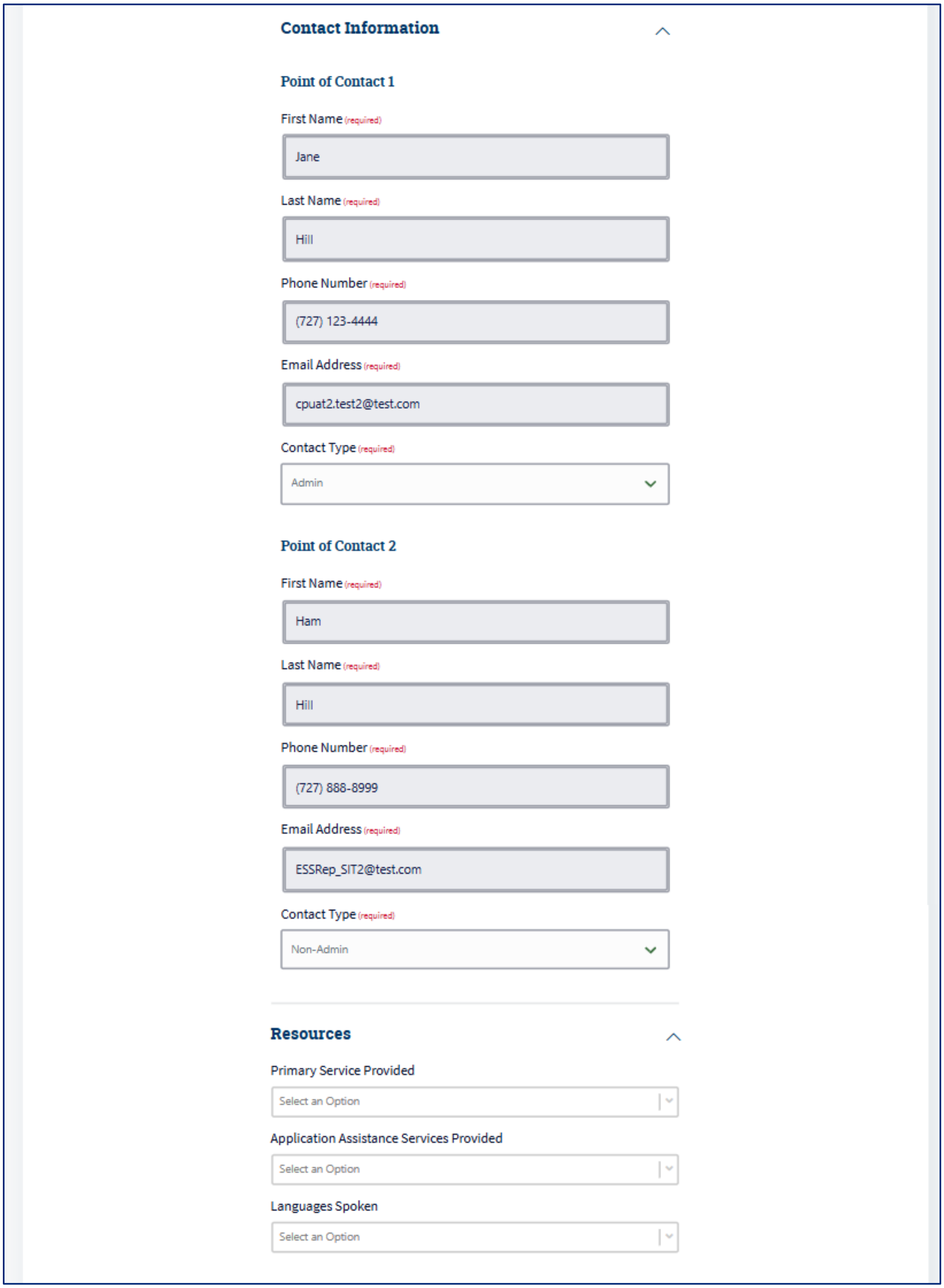
Users who are assigned contact type as "Admin" will be assigned as "Partner Managers".

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 Affordable Benefits
Access Level
Assistance Site
Phone Number
(727) 111-3333
Fax Number
(XXX) XXX-XXXX
Street Address (required)
12345 Sample Street S
Suite / Apartment Number (required)
City (required)
Jacksonville
State
Florida
Zip Code (required)
32201
County (required)
Duval
Is your organization's mailing address different from the address above? (required)
No
Transportation Instructions
Parking Instructions
What is your organization's website address?
accessaffordablebenefits.edu
If your organization does not have a website, you may provide a link to your social media site(s).
Email Address
cpuat2.test2@test.com



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

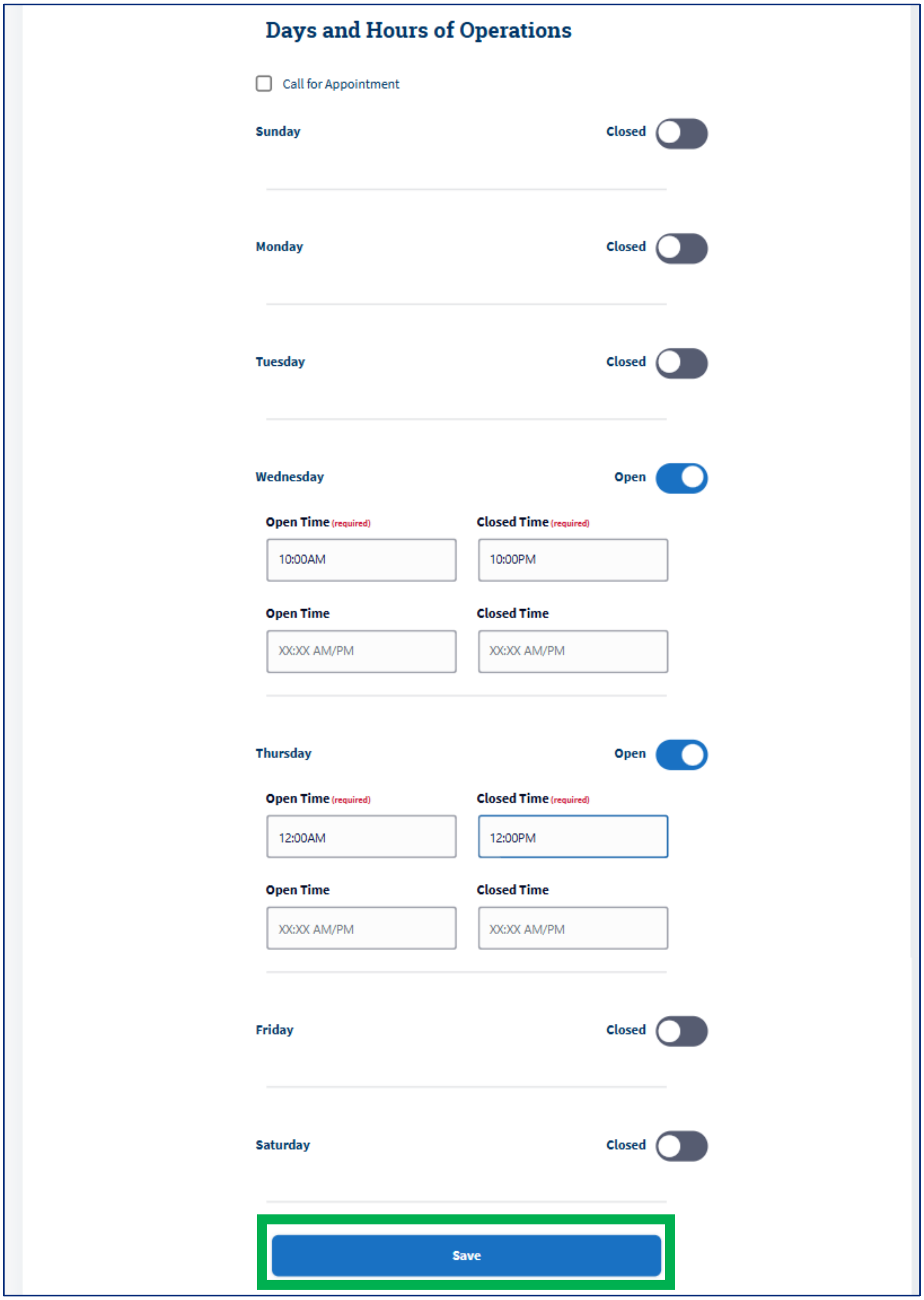
Select an Option

Application Assistance Services Provided

Select an Option

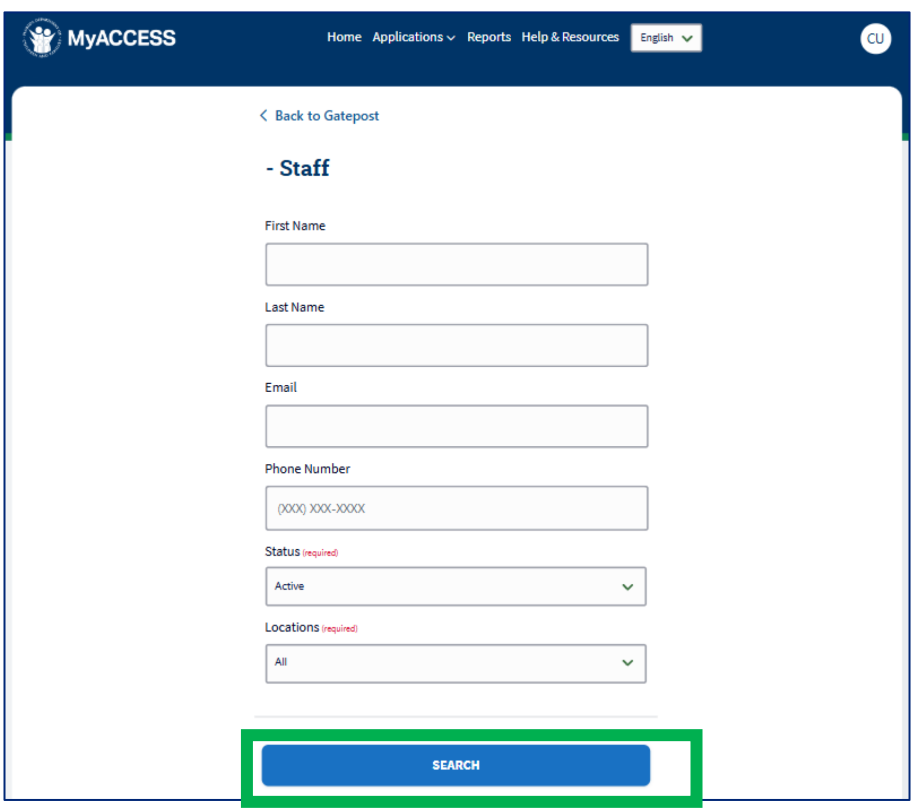
Languages Spoken

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.

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



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

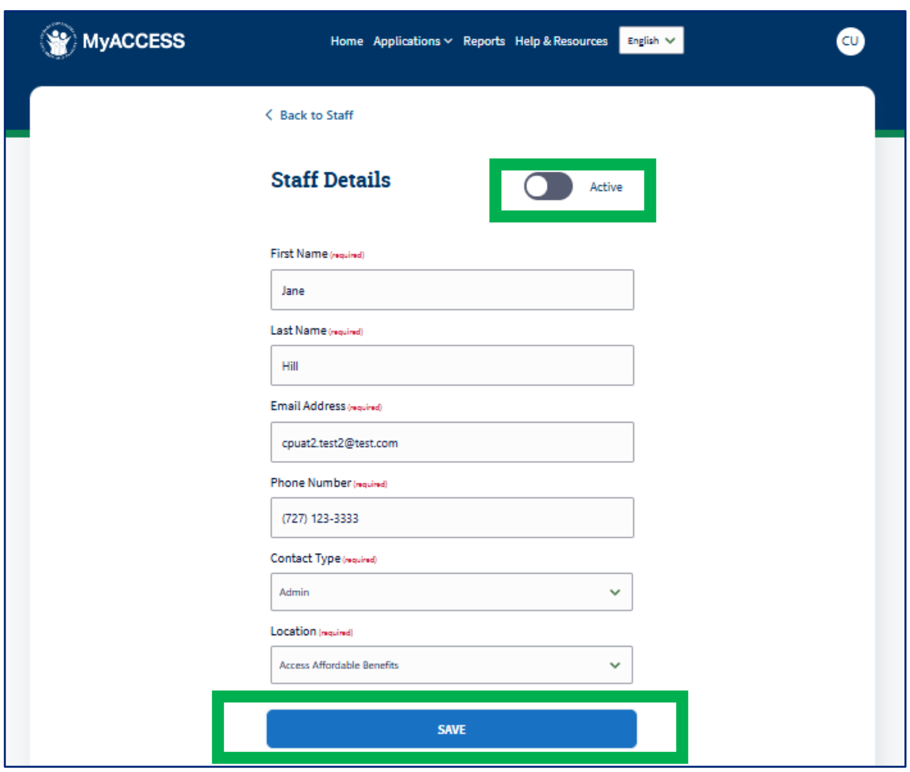
Select the staff name to view/edit details of that staff member.

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.

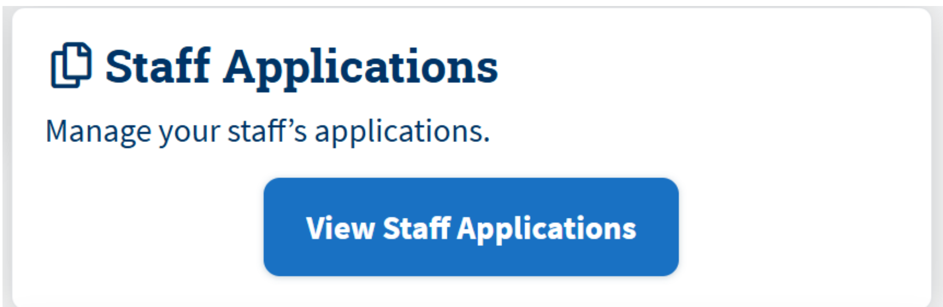
Click Save to save any changes made for a particular staff member.

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



Staff Applications

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

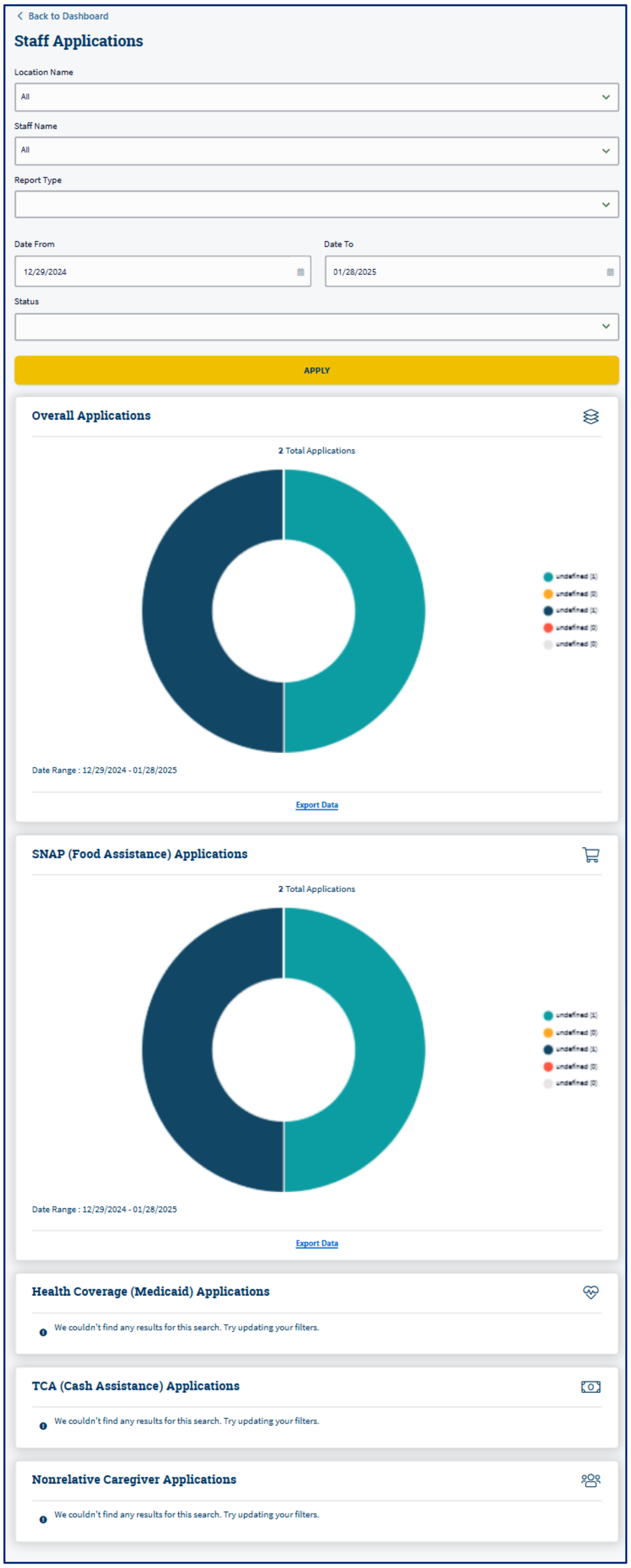


Use the Staff Applications screen to find applications submitted by staff. Organize results by location name, staff name, and/or report type.

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.

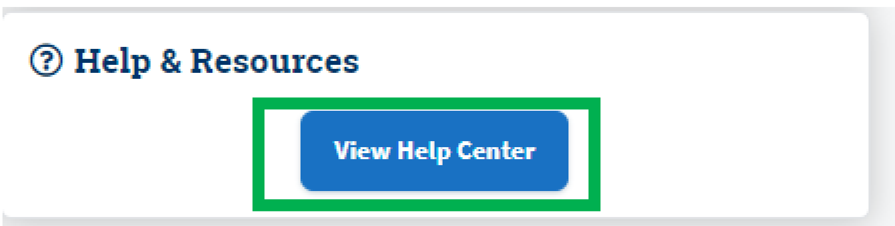
Select the “Export Data” hyperlink under each category to export the data results in an excel file.


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 (0)
undefined (1)
undefined (0)
undefined (0)
Date Range : 12/29/2024 - 01/28/2025
Export Data
SNAP (Food Assistance) Applications
2 Total Applications
undefined (1)
undefined (0)
undefined (1)
undefined (0)
undefined (0)
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.

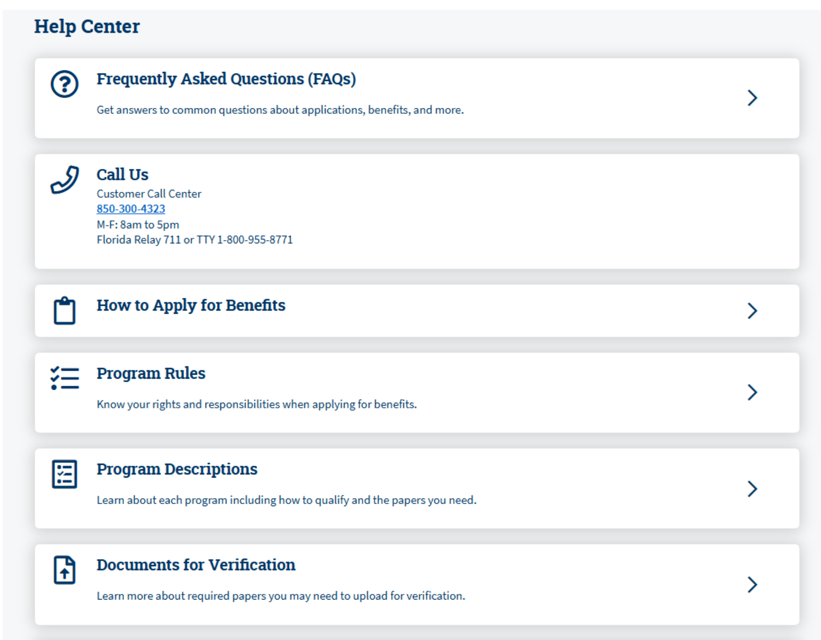
Help & Resources

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.

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.