



Partner Staff Role User Guide

Contents

- Summary..... 2**
- Getting Started 2**
- Partner Staff Dashboard..... 4**
 - Client Search 5**
 - My Clients 9**
 - My Submissions..... 10**
 - Submit Documents 14**
 - My Reports 17**
 - Referral Campaigns 19**
 - Share a Campaign Referral URL..... 21**
 - Create a New Campaign 22**
- Help & Resources 25**
- Resources..... 26**



Summary

The Partner Staff 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.

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 Staff dashboard.

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

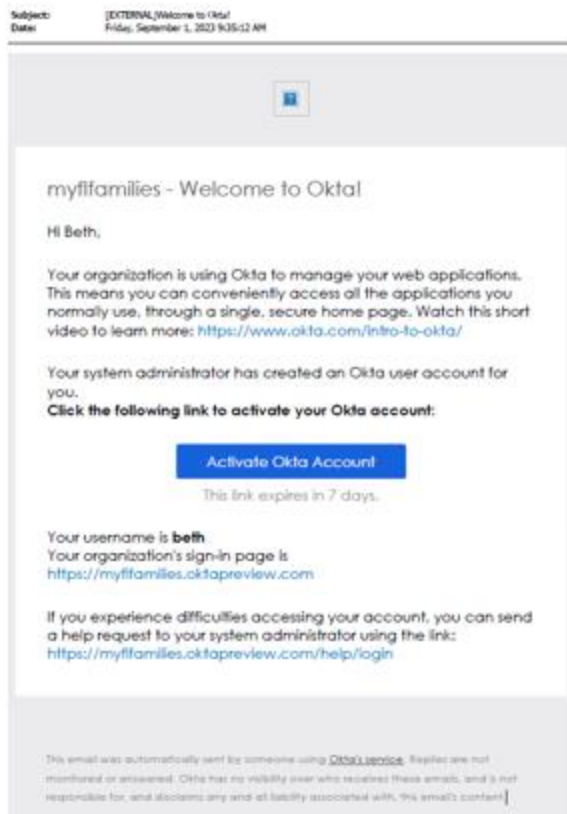
If your organization is already a current partner and you are looking to update role permission or add new partner staff, please send an email to hqw.ess.partner@myflfamilies.com if you are a Community



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 Staff Dashboard

Hello, Essrepdev

Access Medical Center

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 Submissions

0 In Progress

View

0 Submitted

View

0 Received

View

0 Processed

View

New Application

View My Submissions

View Documents Needed

Submit Documents

Upload documents for an application or case.

Upload A Document

My Reports

View key metrics about applications 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

Help & Resources

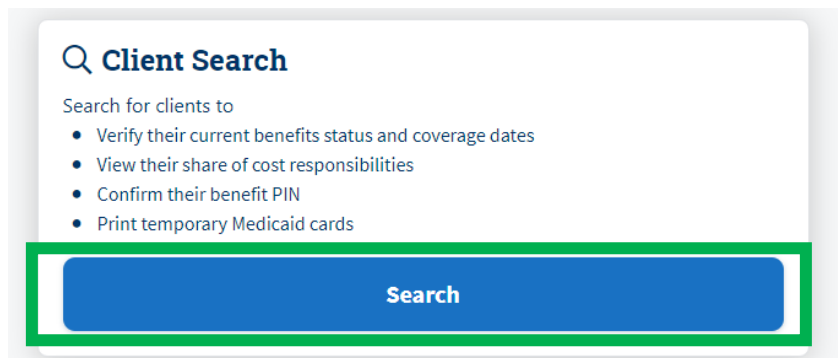
View Help Center



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". The title "Client Search" is in bold. Below the title are two required fields: "Date of Birth (required)" with a text input field containing "MM/DD/YYYY" and a calendar icon, and "Search Type (required)" with a dropdown menu showing "-Select One-" and a green checkmark. At the bottom is a large blue button labeled "SEARCH".A close-up screenshot of the "Search Type (required)" dropdown menu. The menu is open, showing the selected option "-Select One-" at the top with a green checkmark. Below it are four other 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  |  |
| Last Name JASMINE | First Name PRINCESS |
| Gender Female | Social Security Number ***.**-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

pg. 7

March 2025



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.

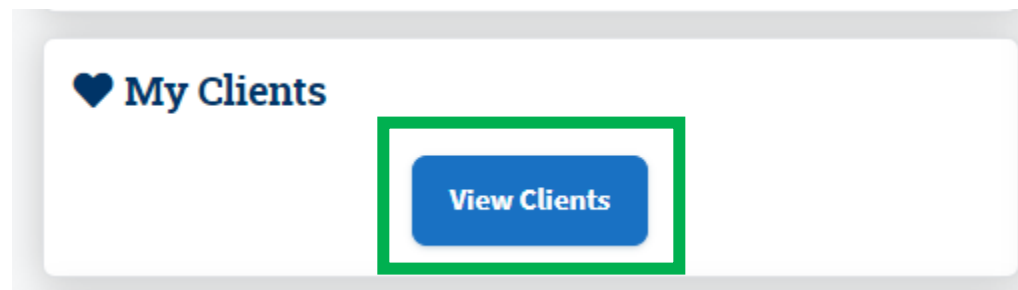
To navigate back to your partner staff dashboard, use the link at the top of the page.

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

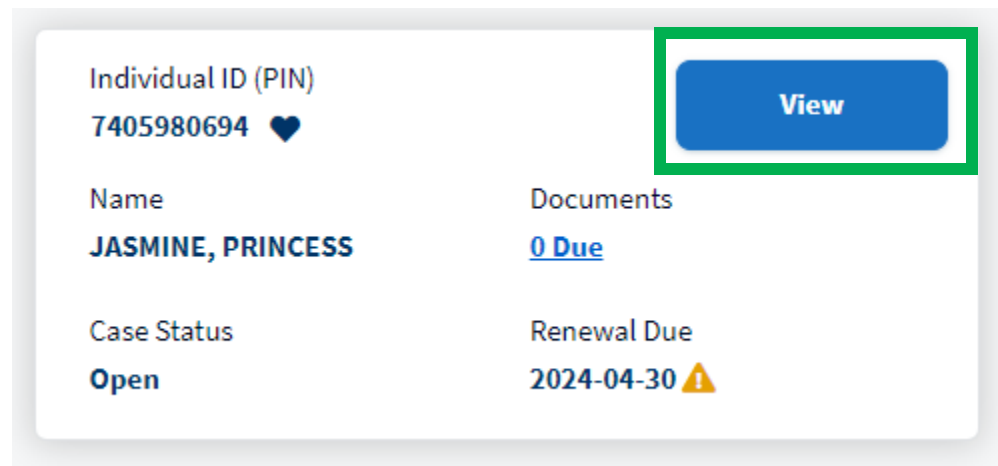


My Clients

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.

The screenshot shows a dashboard titled "My Submissions" with a document icon. It displays four categories of submissions: "14 In Progress", "18 Submitted", "22 Received", and "2 Processed". To the right of each category is a blue "View" button. A green rectangular box highlights these four "View" buttons. Below the submission list are three buttons: a yellow "New Application" button with a plus icon, and two blue buttons labeled "View My Submissions" and "View Documents Needed".

| Status | Count | Action |
|-------------|-------|--------|
| In Progress | 14 | View |
| Submitted | 18 | View |
| Received | 22 | View |
| Processed | 2 | View |

[New Application](#)

[View My Submissions](#)

[View Documents Needed](#)



Results for each application will display and additional information is available by selecting **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 | Application Number 800215748 | View Details |
| Last Name Jade | First Name Ella | Last Name Smith | First Name John |
| Application Status Processed | Case Number 5007226807 | 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 | Application Number 720053545 | Continue |
| Last Name fghf | First Name fh | Last Name STAFFORD | First Name CASTIEL |
| Application Status In Progress | Start Date 03/07/2025 | Application Status In Progress | Start Date 03/07/2025 |
| Remove Application | | Remove Application | |



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

[< Back to Dashboard](#)

Applications

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

A yellow button with rounded corners, containing a plus sign icon and the text "New Application".

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

A blue button with rounded corners and the text "View My Submissions".



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

- 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 Upload

JONES SCOFIELD (41)

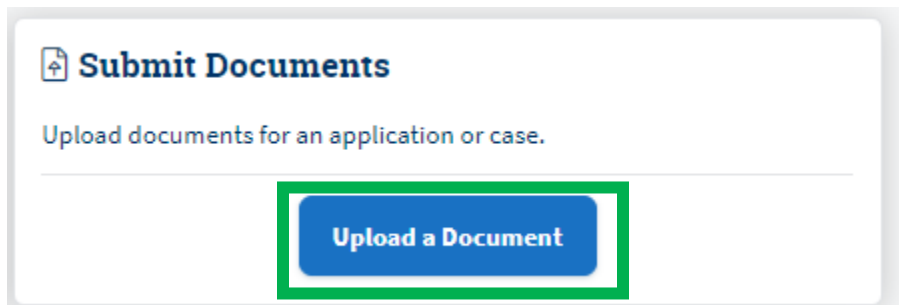
PROOF OF UNITED STATES CITIZENSHIP Upload

JONES SCOFIELD (41)



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 |
| FRXXMXN-MMXTH,RXMXXRX | 230002099 |
| Uploaded Date | Actions |
| 10/16/2024 | View Receipt |

| | |
|-------------------------------------|------------------------------|
| Document Type | Received |
| Housing and Utility Expenses | |
| Applicant | Document ID |
| MXNGRXTXRY,MXR'RXXNXX | 230002092 |
| Uploaded Date | Actions |
| 10/16/2024 | View Receipt |

| | |
|-------------------------------|------------------------------|
| Document Type | Pending |
| Financial Release Form | |
| Applicant | Document ID |
| MXNGRXTXRY,MXR'RXXNXX | 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](#)

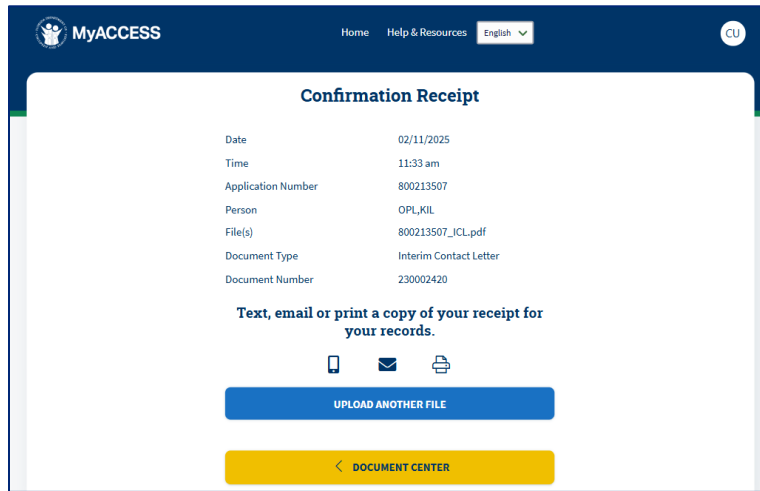
Submit Larger Documents

Upload documents that are larger than 4 MB

[UPLOAD LARGER DOCUMENTS](#)



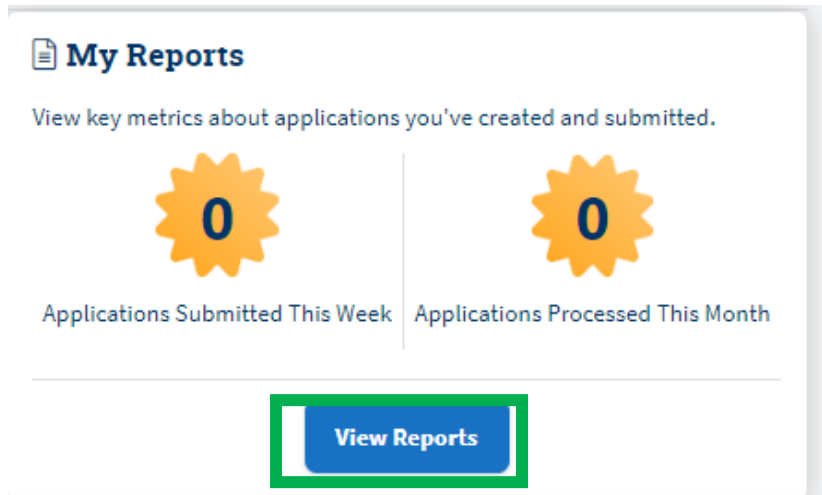
Upon uploading, users will be taken to a confirmation screen. This screen can be displayed for any previously submitted documents by clicking on the “View Receipt” hyperlink as seen on the upload history page.





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

| Status | Count |
|-------------|-------|
| In Progress | 4 |
| Submitted | 3 |
| Rejected | 2 |
| Processed | 1 |

Date Range: 10/11/2024 - 01/10/2025

Export Data

SNAP (Food Assistance) Applications

7 Total Applications

| Status | Count |
|-------------|-------|
| In Progress | 3 |
| Submitted | 2 |
| Rejected | 1 |
| Processed | 1 |

Date Range: 10/11/2024 - 01/10/2025

Export Data

Health Coverage (Medicaid) Applications

6 Total Applications

| Status | Count |
|-------------|-------|
| In Progress | 2 |
| Submitted | 2 |
| Rejected | 1 |
| Processed | 1 |

Date Range: 10/11/2024 - 01/10/2025

Export Data

TCA (Cash Assistance) Applications

2 Total Applications

| Status | Count |
|-------------|-------|
| In Progress | 1 |
| Submitted | 1 |

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.

 **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.

Campaign Status

Active Archived

[SEARCH](#)

| | |
|-----------------------------------|--|
| Campaign Name | VIEW DETAILS |
| New campaigns | |
| Campaign Start Date | Campaign Status |
| 03/12/2025 | <input checked="" type="checkbox"/> 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.

A screenshot of a web application interface. At the top left, there is a link with a left-pointing arrow and the text "Back to Dashboard". Below this is the main heading "Referral Campaigns" in a large, bold, blue font. Underneath the heading is a white card with two tabs: "Campaigns" (which is selected and has a teal underline) and "Reports". In the center of the card, there is a yellow button with a green border and the text "CREATE NEW CAMPAIGN". Below the button is a light blue box containing a question mark icon, the text "What is a Referral Campaign?", and a downward-pointing chevron icon on the right side.



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)

This is the title of your referral campaign.

Campaign Start Date (required)

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

Custom Referral Code (required)

This will be used to generate your referral URL.

Preview of Referral URL



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.

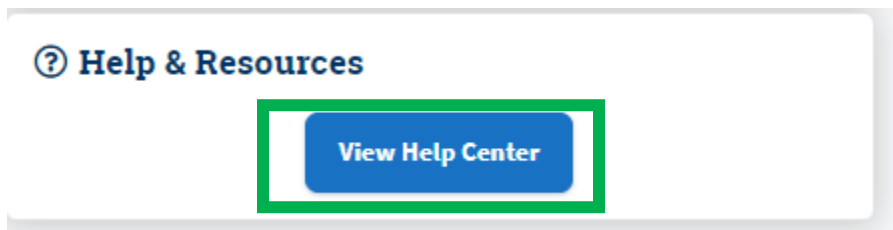
[BACK TO REFERRAL CAMPAIGNS](#)



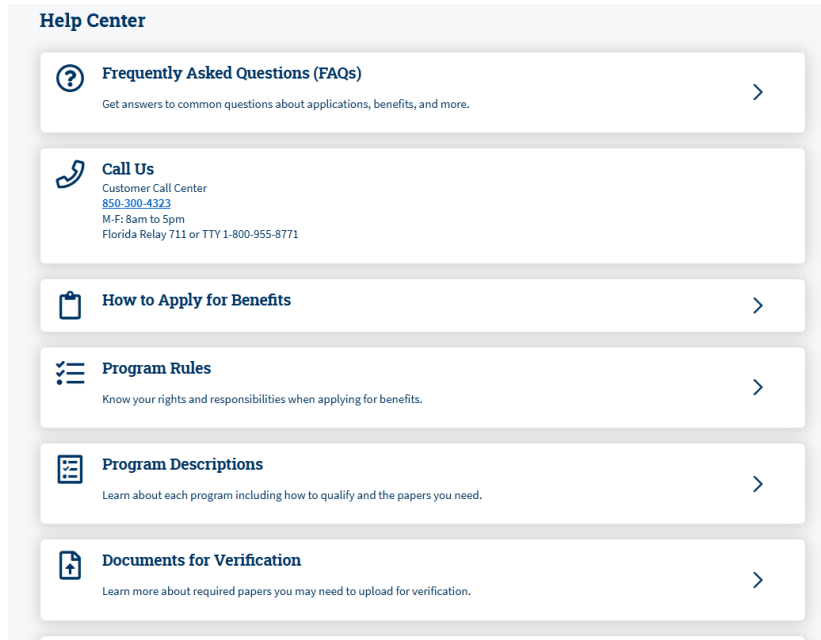
Help & Resources

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

For additional program information please contact:

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.