Partner Staff Role User Guide

Contents

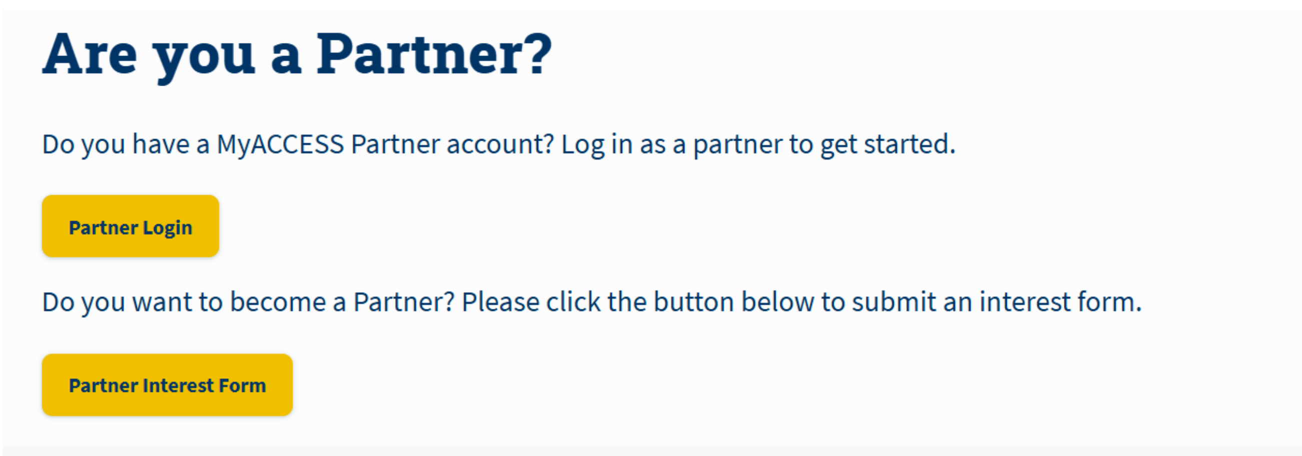
Summary

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.



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

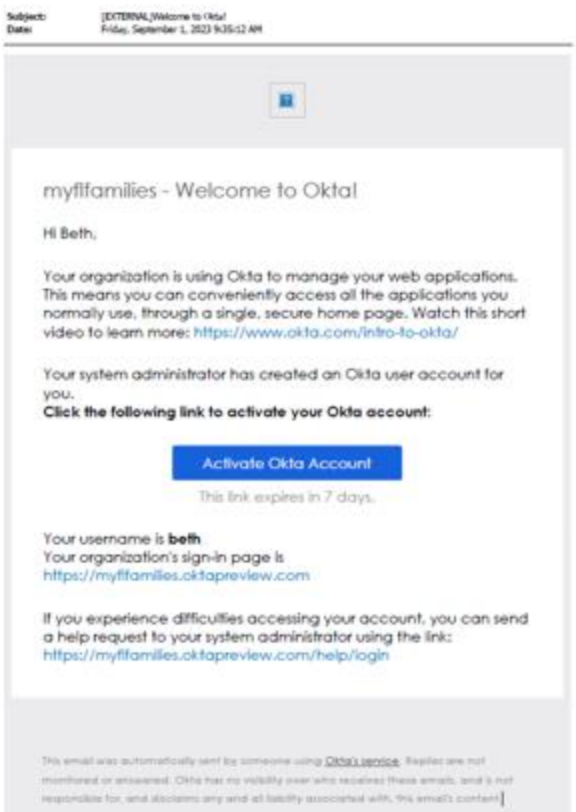
Note: An active partner organization and an OKTA account are required to log in as a Partner Staff. If your organization is not already a current partner, navigate to https://www.myaccess.myflfamilies.com and click the Partner Interest Form.

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:



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

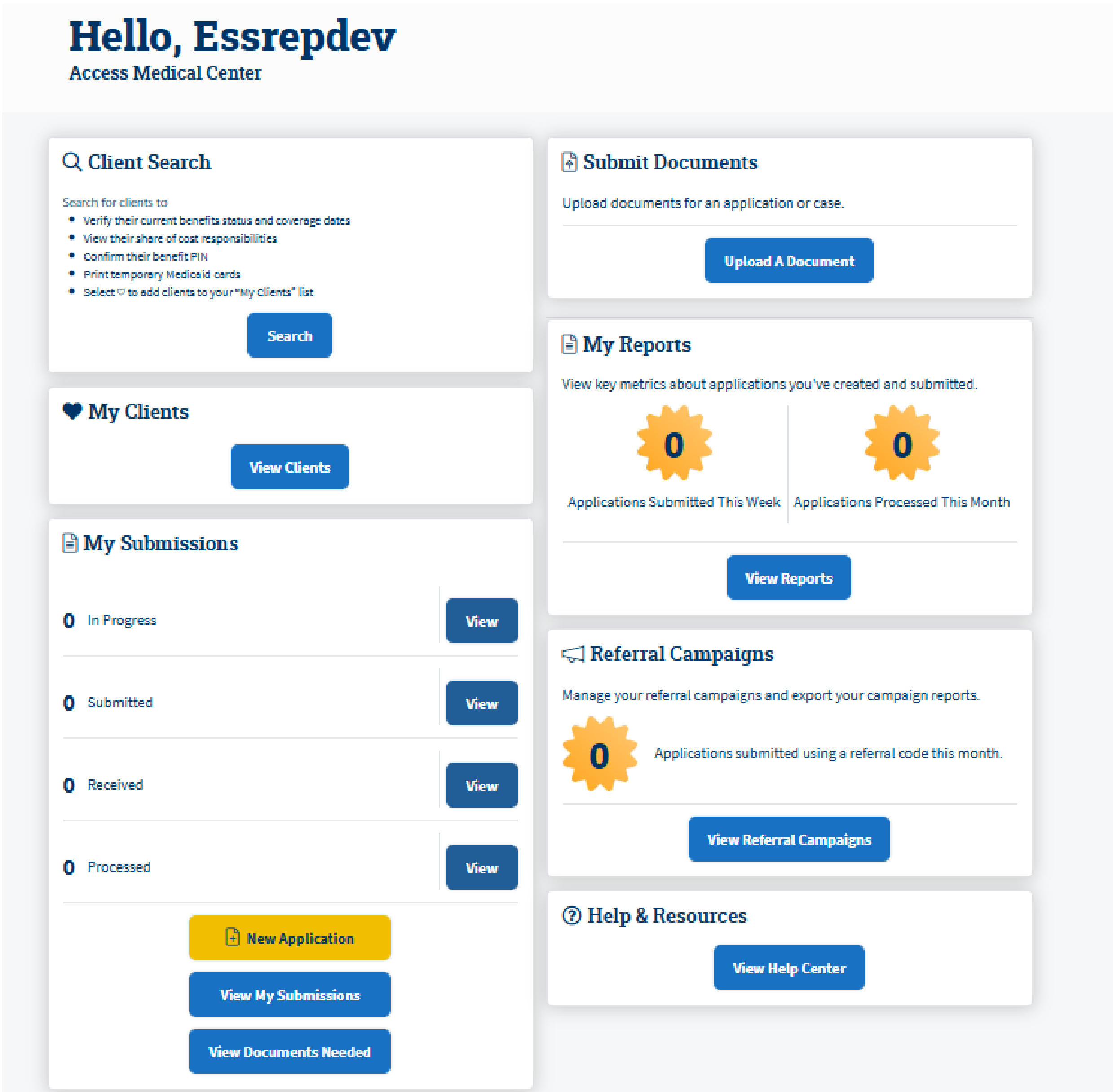
This link expires in 7 days.

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 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.

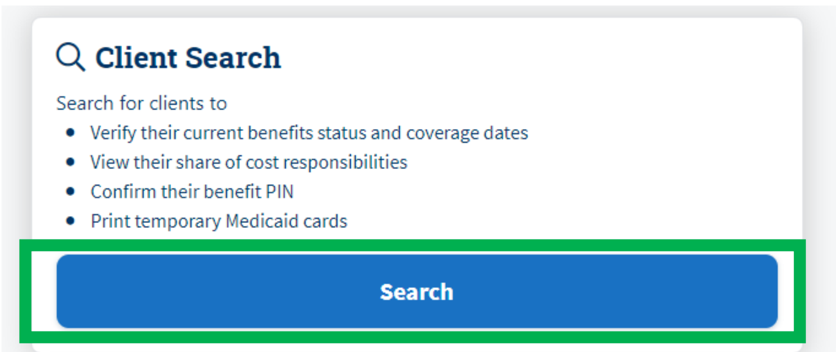
Partner Staff Dashboard



Client Search

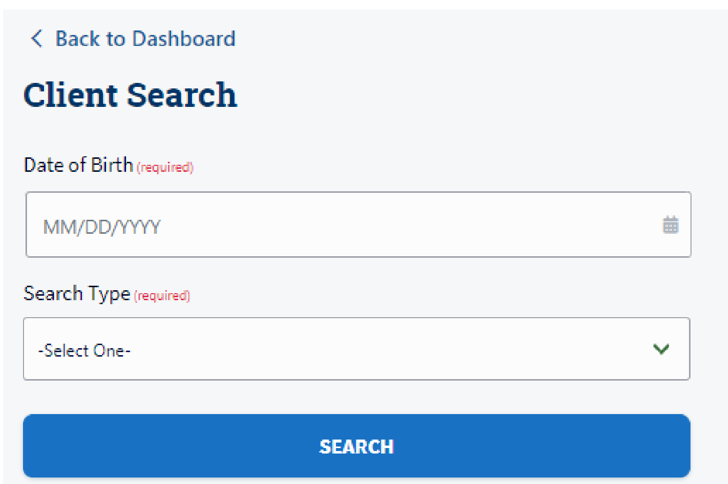
The Client Search functionality allows Partners to locate their client's information to carry out activities on their behalf.

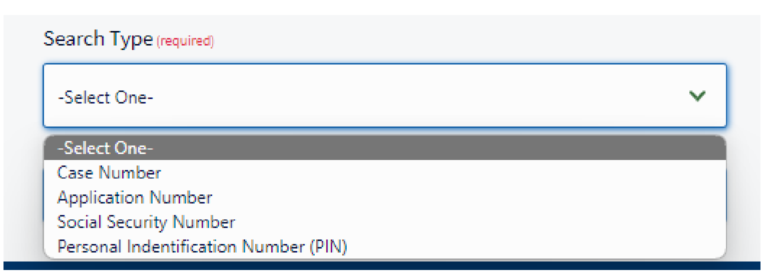
Note: You must have prior authorization from clients to access their data. You must have either a Partner View Release form or Authorized Representative form on file from the client.



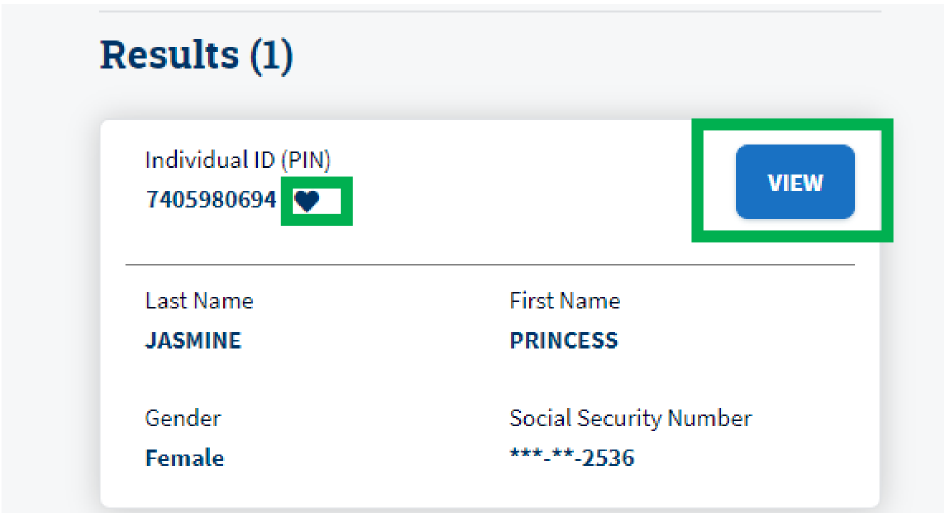
Click on the **Search** button in the Client Search tile of the dashboard.

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.

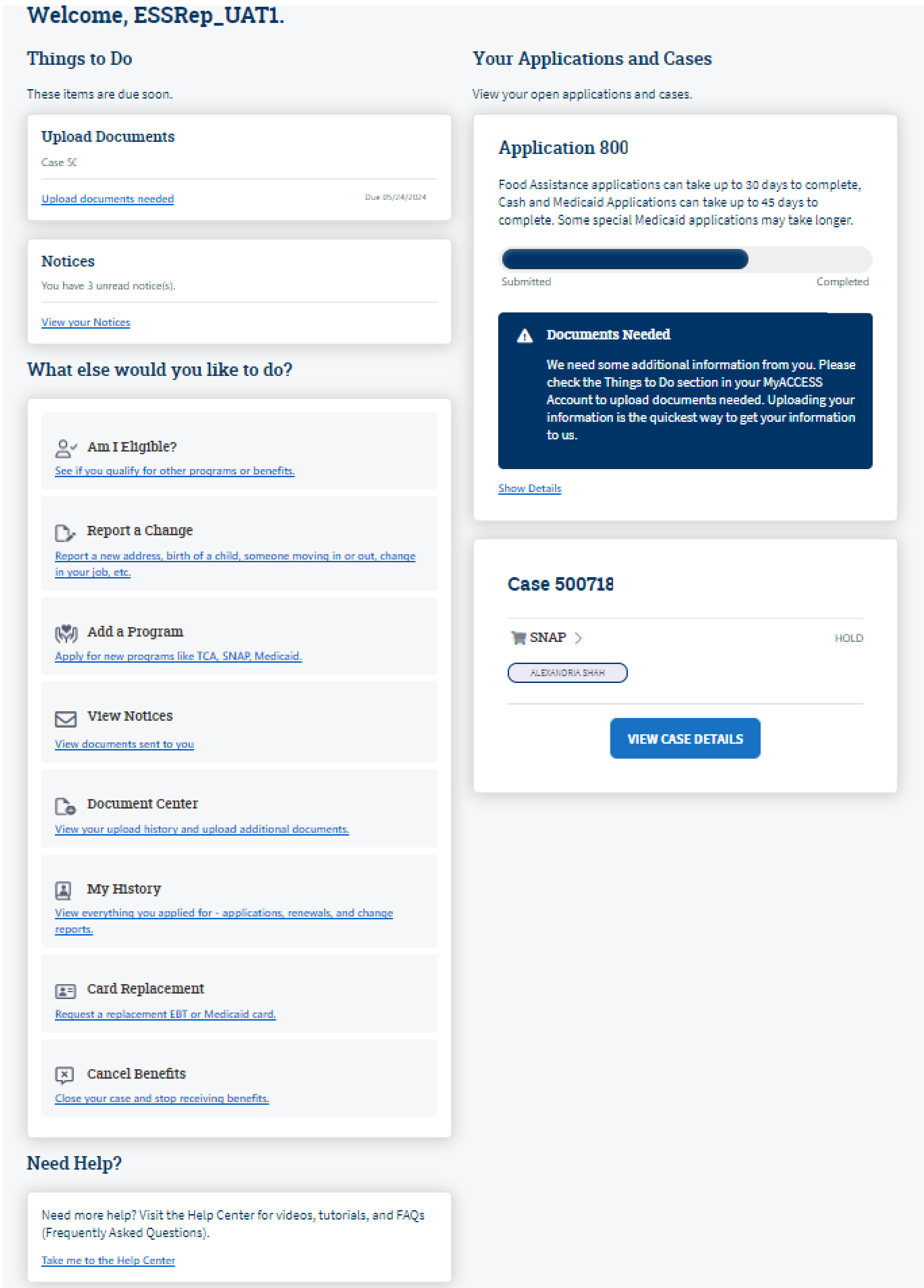
Click the **View** button to view the client dashboard. This will allow you to view the Clients’ dashboard the same way the client would see it if they were logged in. You will not be required to link the case or sign in with the client’s email address.

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.

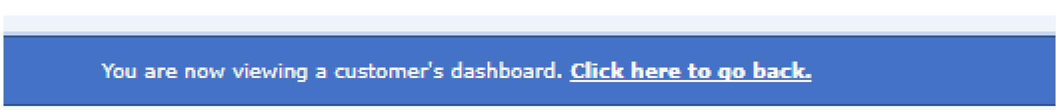
Client Dashboard Example:



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

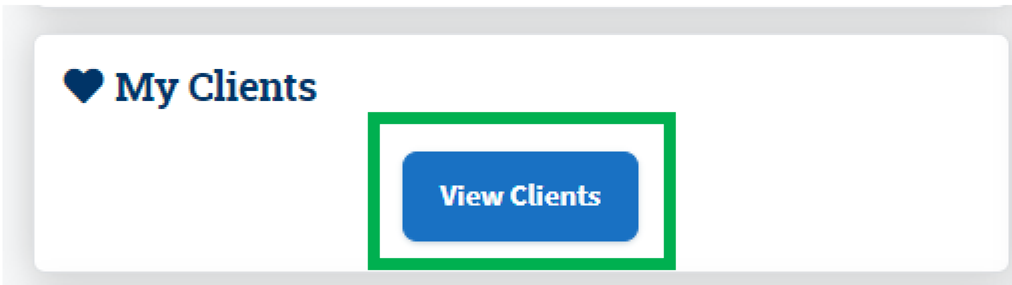
- **Things to Do**
  Items such as the ones listed below will appear here.
  - Unfinished applications
    - Note: if a client has started an application, you will not see the finish application tile under 'things to do' – only the client will see that. If you as a representative start an application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

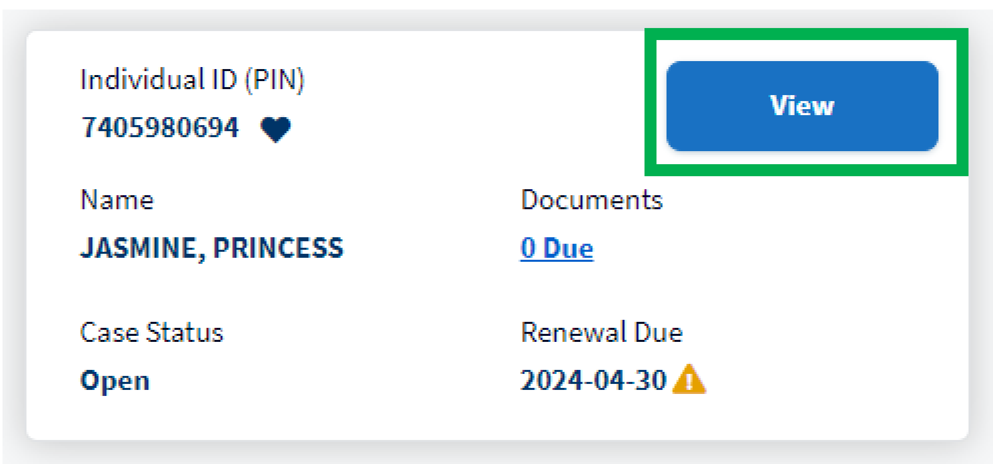


My Clients

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.

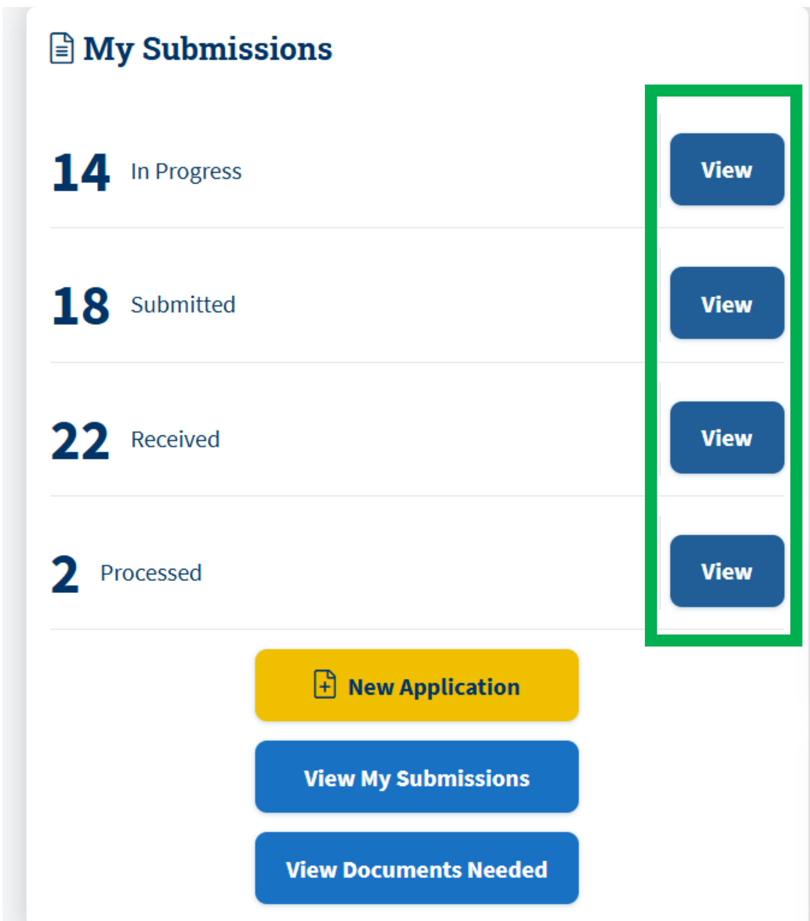


Clicking the View button will take you to the client's dashboard.

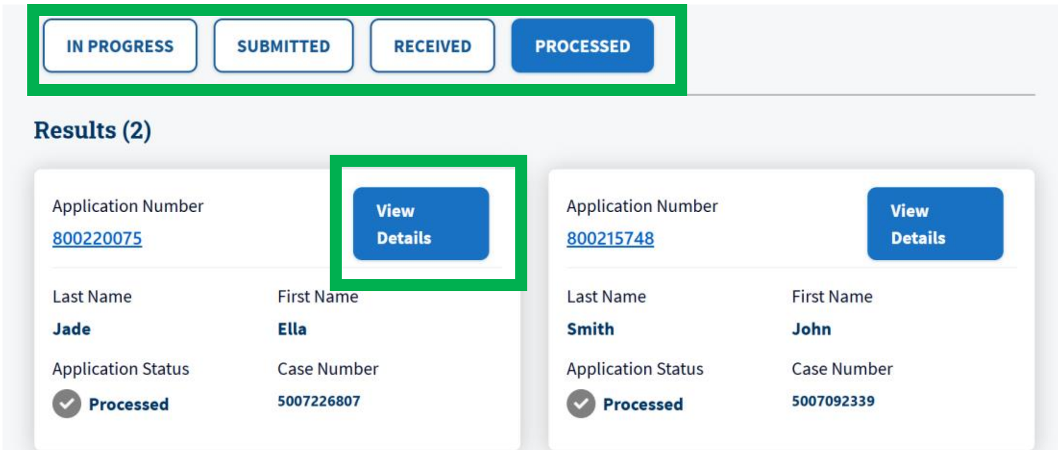
My Submissions

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

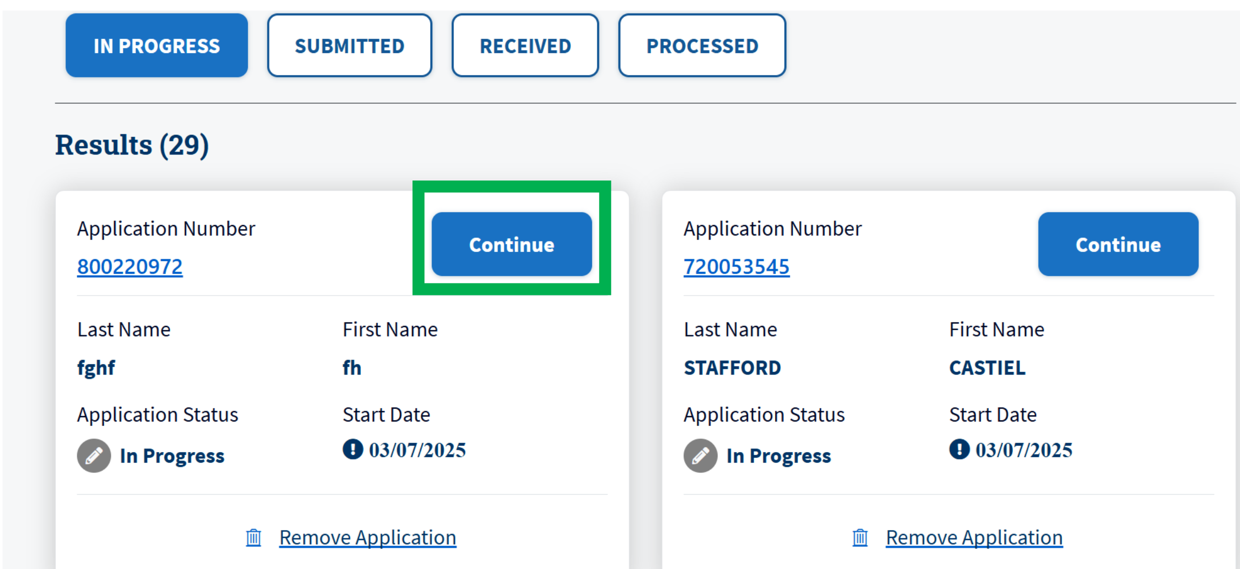
Click the View button on each application phase to see more application details.



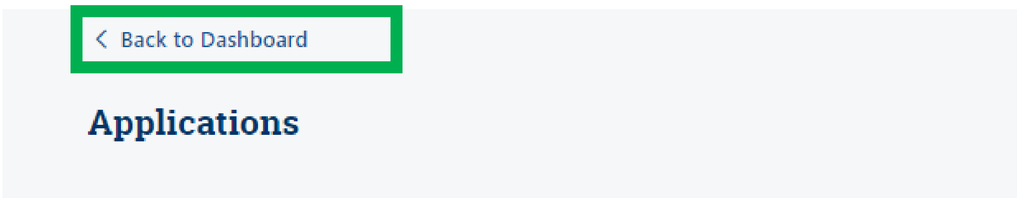
Results for each application will display and additional information is available by selecting **View Details** for more information. You can also toggle between the different application phases.



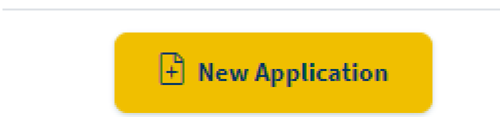
Any in progress applications can be resumed by clicking on the application number or the **Continue** button. You will be taken to the section in the application last updated.



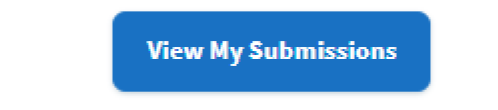
Click the Back to Dashboard button at the top of the screen to go back to your dashboard.



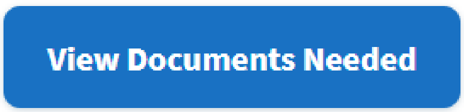
The yellow **New Application** button allows you to start a new application.



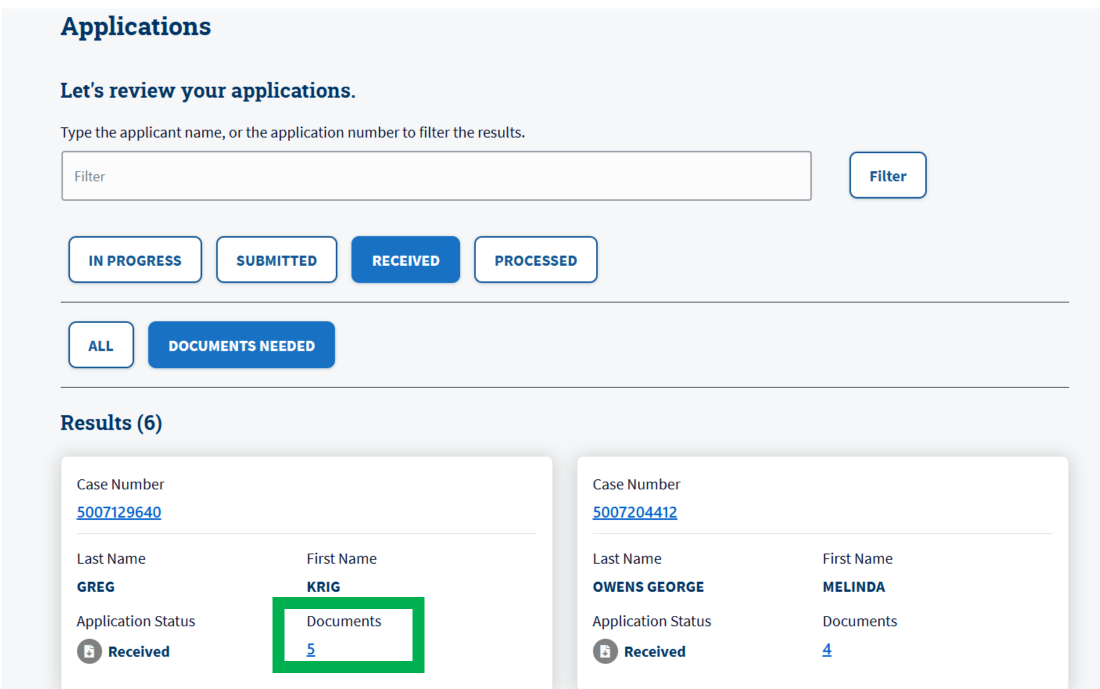
The **View My Submissions** button is another way to see all the submissions you have done.

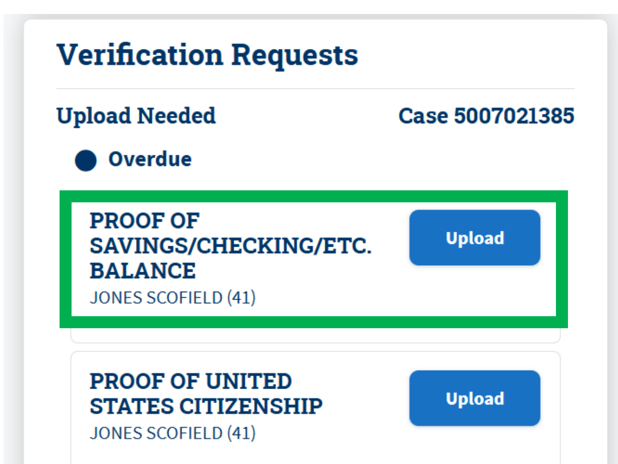


The **View Documents Needed** button takes you to each case where additional documents are needed.



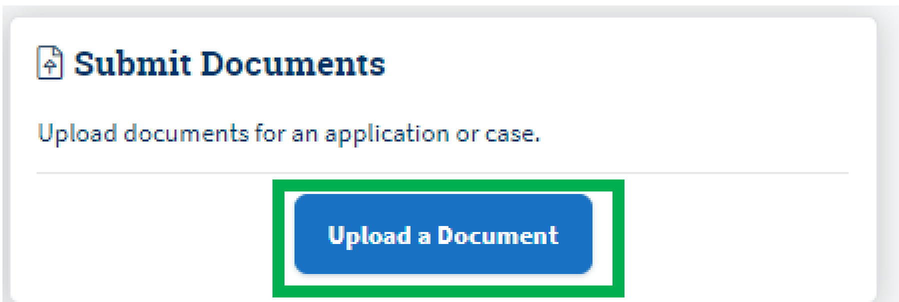
Click on the number under documents to be taken to a list of the specific documents needed.





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.

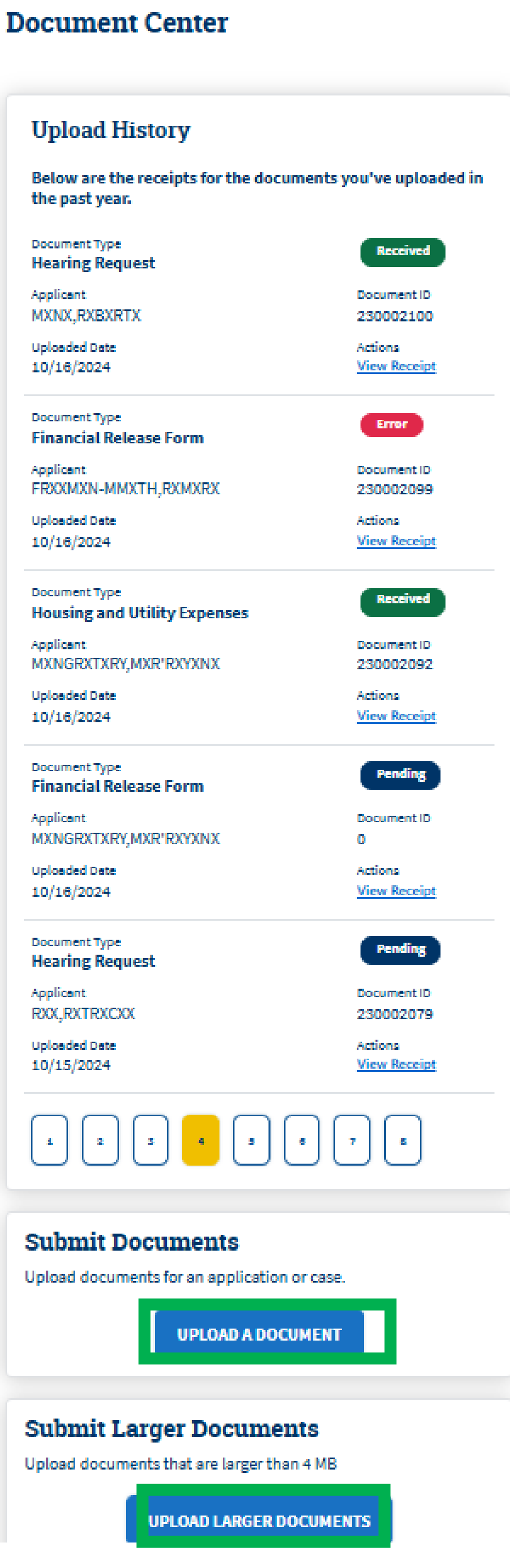


The Document Center landing page will display. The upload history for receipts of documents uploaded within the past year will be displayed. Each upload will have a status next to the Document Type.

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

1 2 3 4 5 6 7 8

Submit Documents

Upload documents for an application or case.

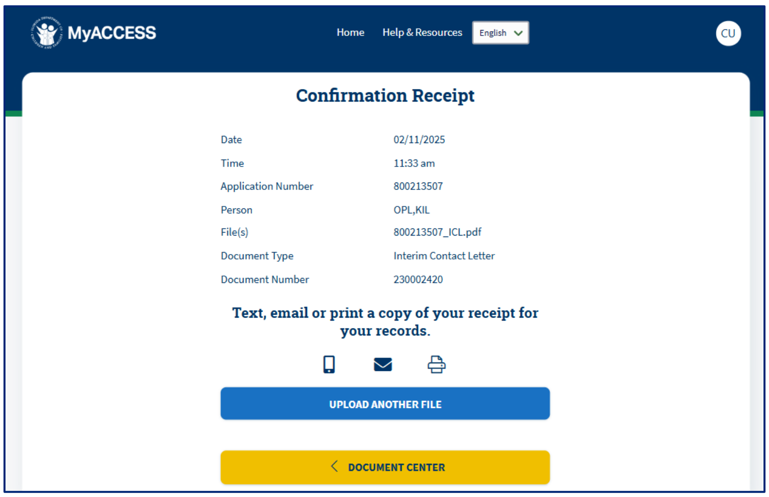
UPLOAD A DOCUMENT

Submit Larger Documents

Upload documents that are larger than 4 MB

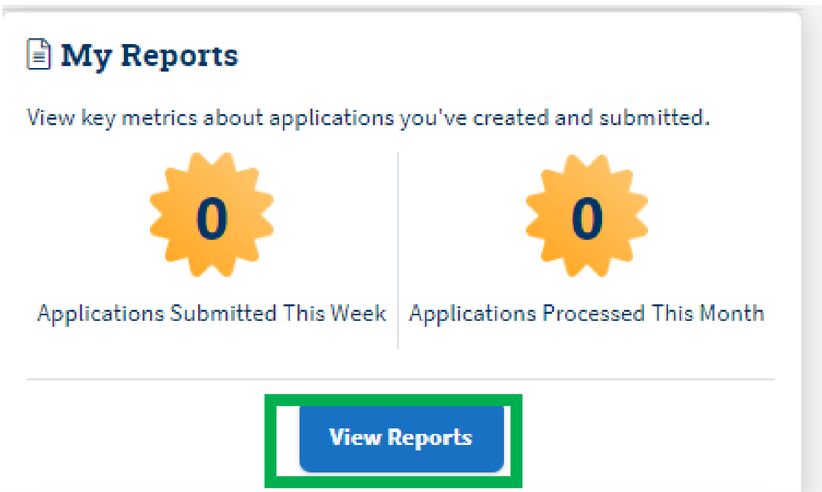
UPLOAD LARGER DOCUMENTS

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
EE
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

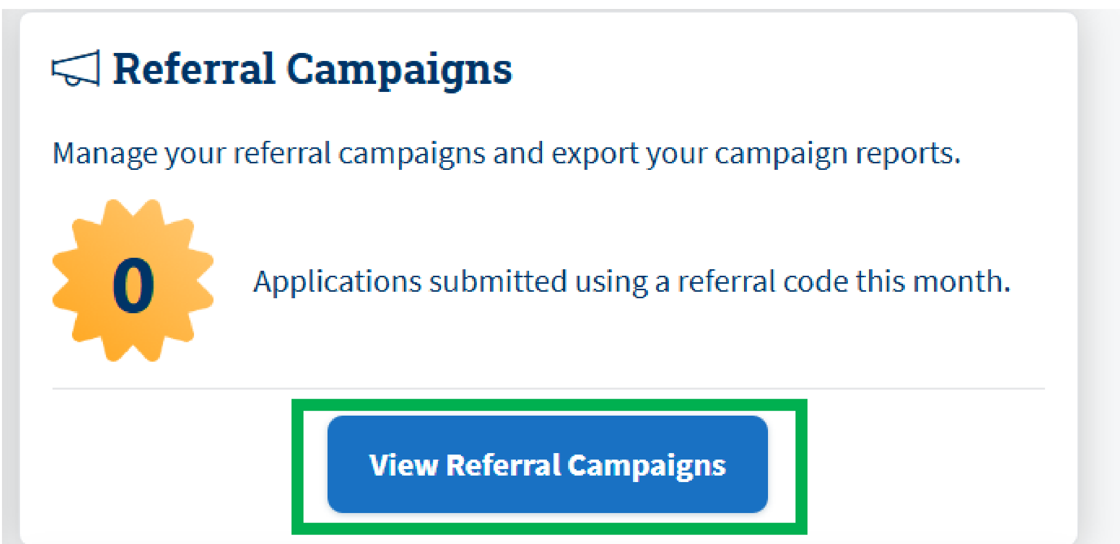
Referral Campaigns

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

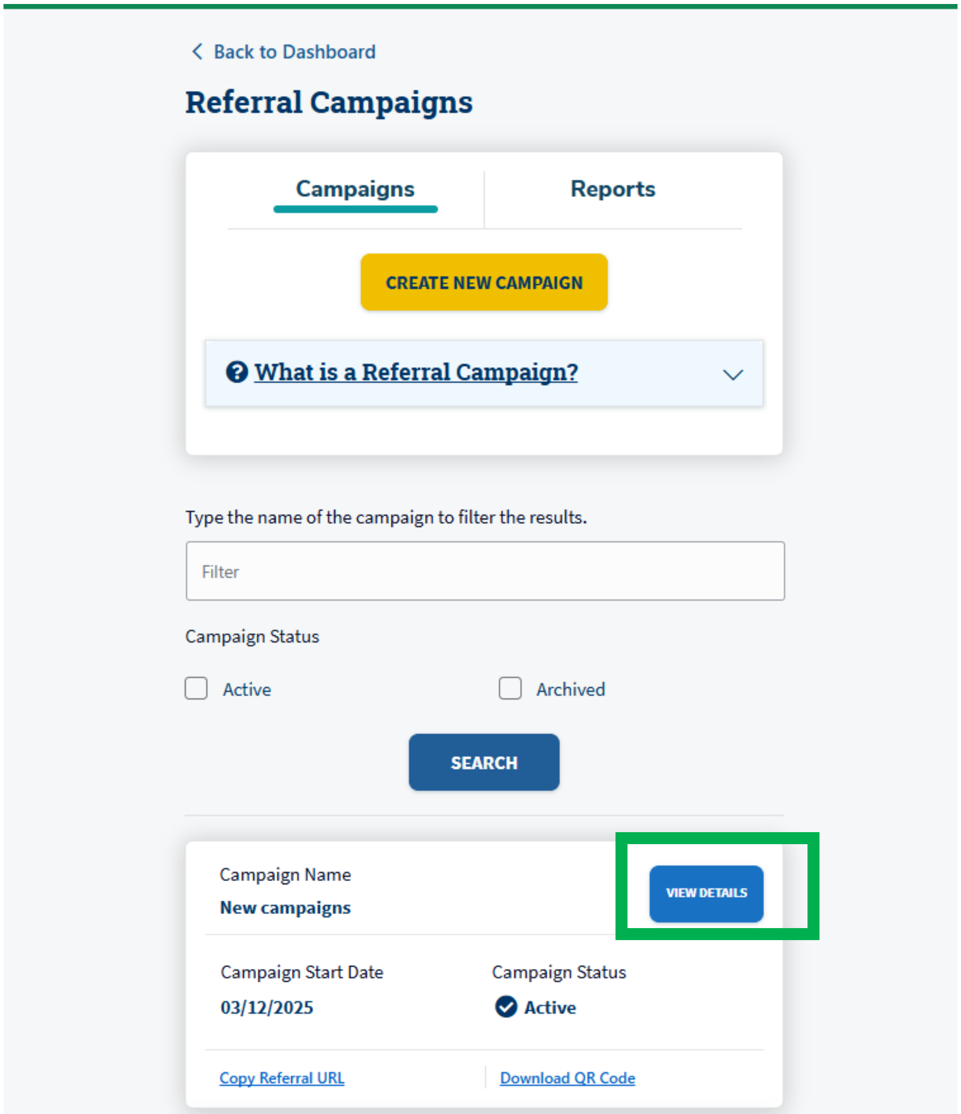
Examples:

- 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.

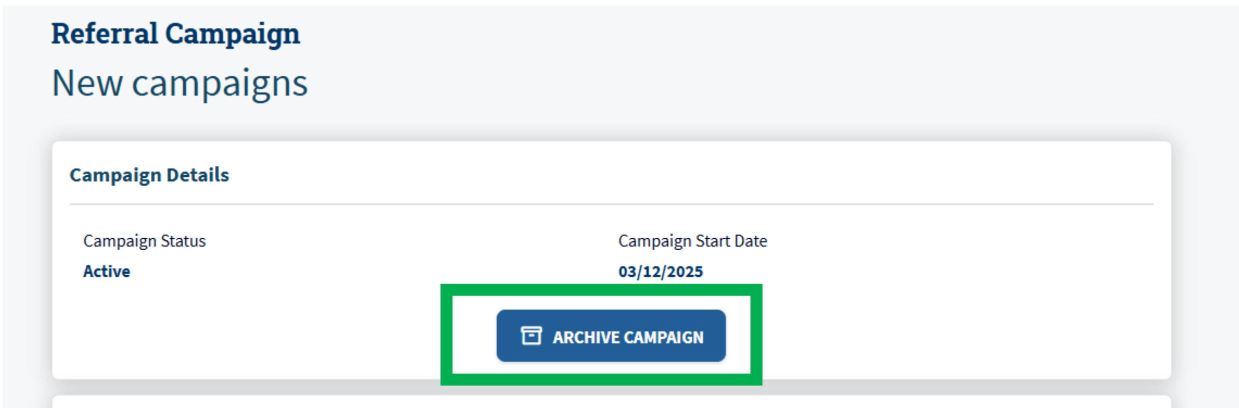
Click **View Referral Campaigns** to Create new referral campaigns and view reports/details on current and archived campaigns.



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



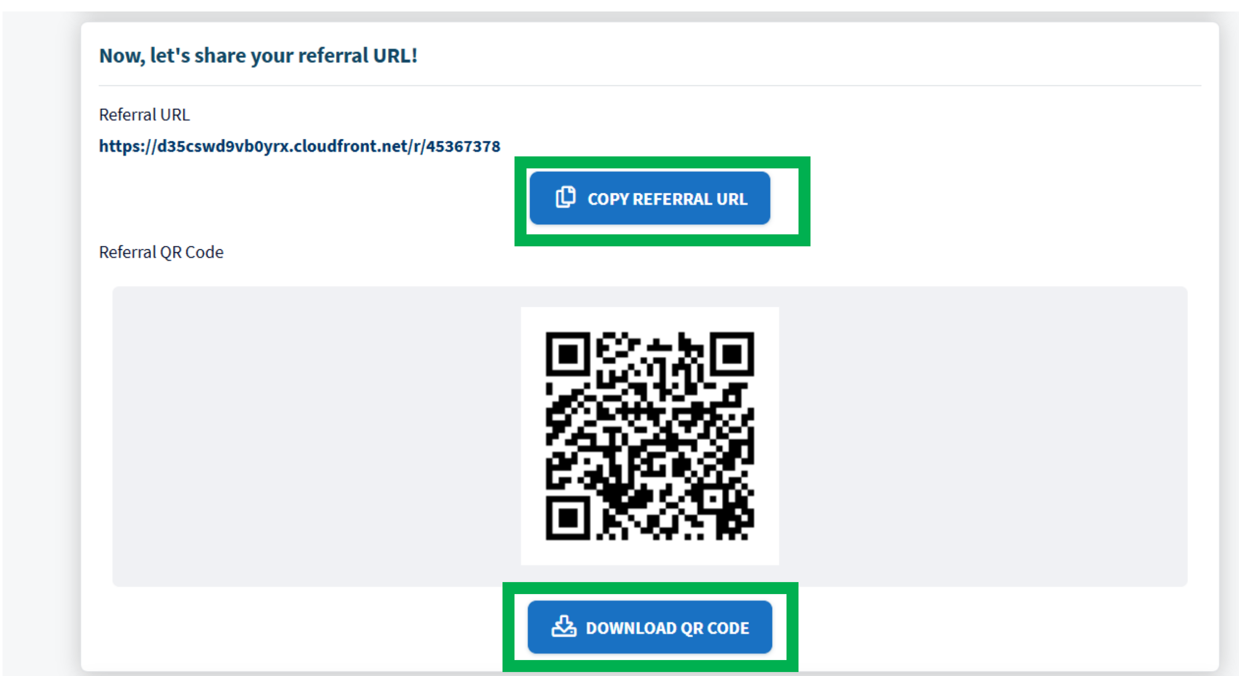
Click the **Archive Campaign** button to archive a current campaign.



Share a Campaign Referral URL

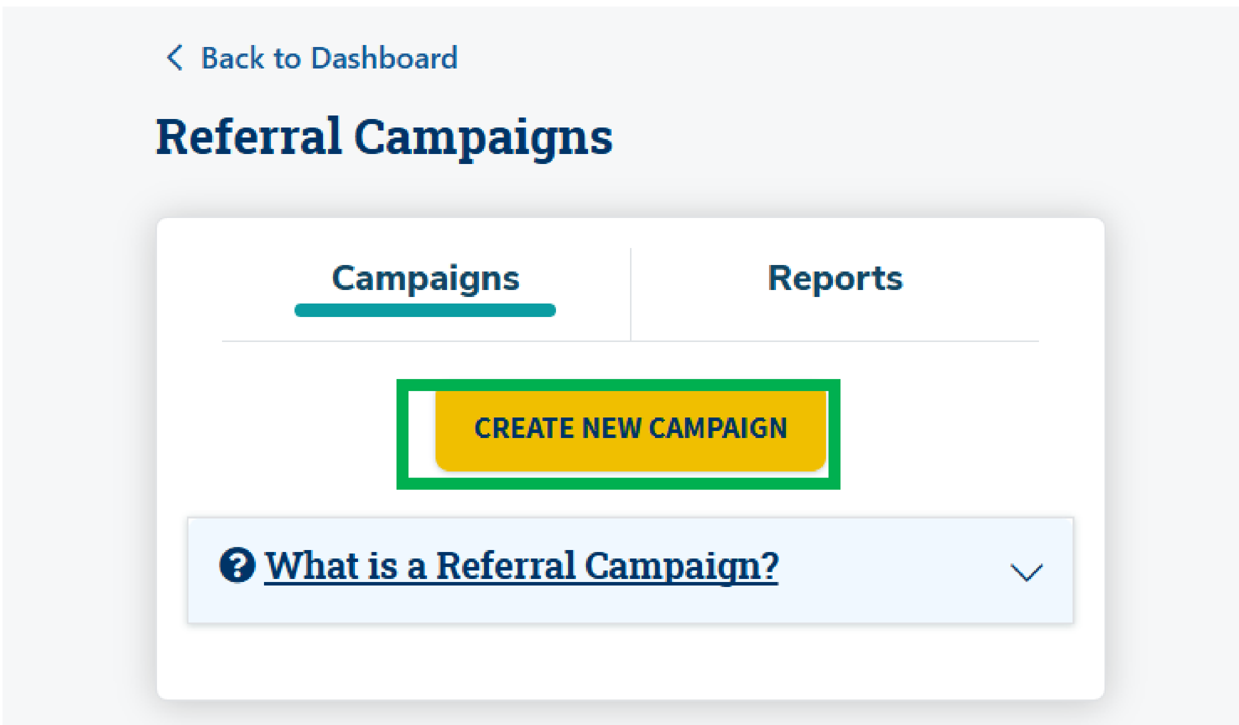
Click on the **Copy Referral URL** button to copy the campaign URL to your clipboard. From here you can save this URL in your internet bookmarks, and/or share in other preferred communication methods.

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



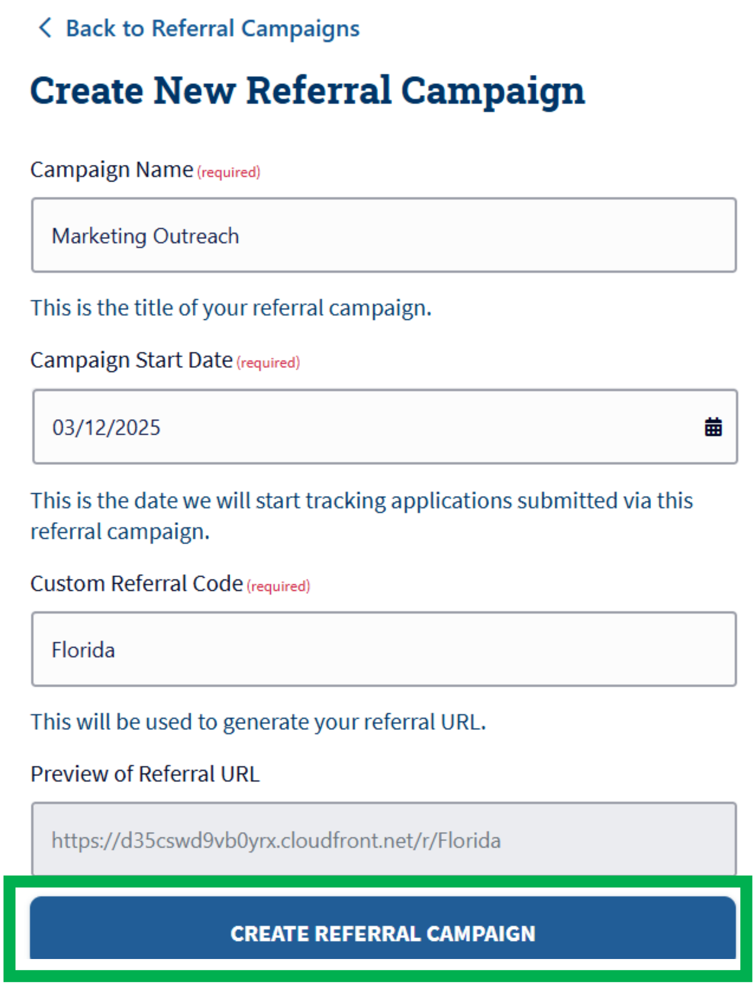
Create a New Campaign

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

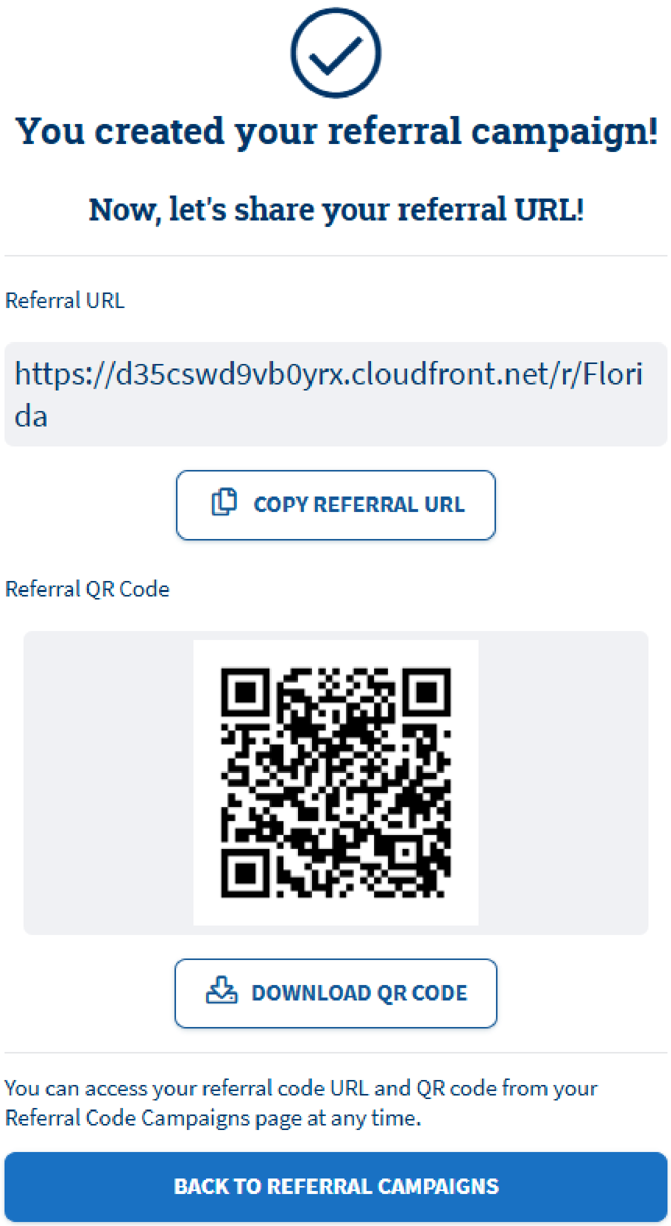


Enter in information in the required fields. A preview of your referral campaign URL will be generated as in the image example below.

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



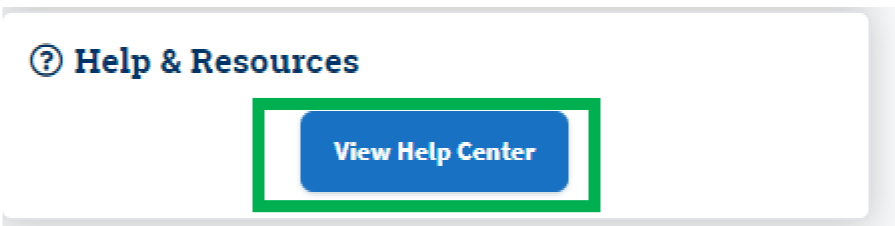
From here you will be able to copy the URL code and/or download the referral QR code for distribution.



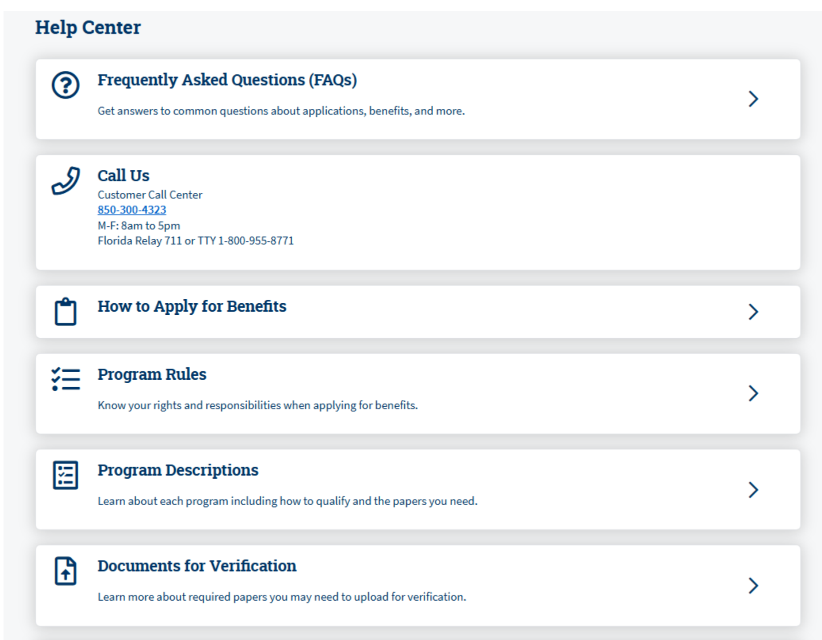
Help & Resources

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.

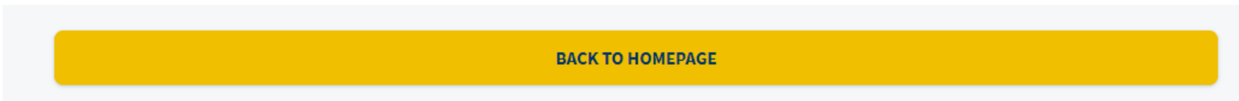
To navigate to the Help Center from the dashboard, click on the **View Help Center** button on the Help & Resources tile.



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

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.