ACCESS HRA YOUR WAY

# ACCESS HRA Provider Portal Home Page

nyc.gov/hrapartners

NYC

## ACCESS HRA Provider Portal

HRA Your Way

The ACCESS HRA Provider Portal is a new way for organizations to connect with the clients they serve in New York City. Through the ACCESS HRA Provider Portal, organizations can view real time benefit information for their clients.

Log In

Create Account

**Create Account**
Get started by creating an account or by logging in with the credentials you have already created for the Provider Portal. Credentials used in the ACCESS HRA Client Portal cannot be used in the ACCESS HRA Provider Portal. Please create a new username.

### ACCESS HRA

**ACCESS HRA public facing!**
New Yorkers can apply and recertify online for SNAP and Cash assistance, view benefits, and much more.

nyc.gov/ACCESSHRA

**ACCESS HRA Mobile**
Clients can now see information about their benefits and upload requested documents on our new App.

Visit nyc.gov/accesshramobile on an Android or iOS mobile device.

ACCESS HRA

GET IT ON Google Play

Download on the App Store

### Get Information

For details on how to enroll as an ACCESS HRA provider or to find organization details, go to our FAQ page or User Guide.

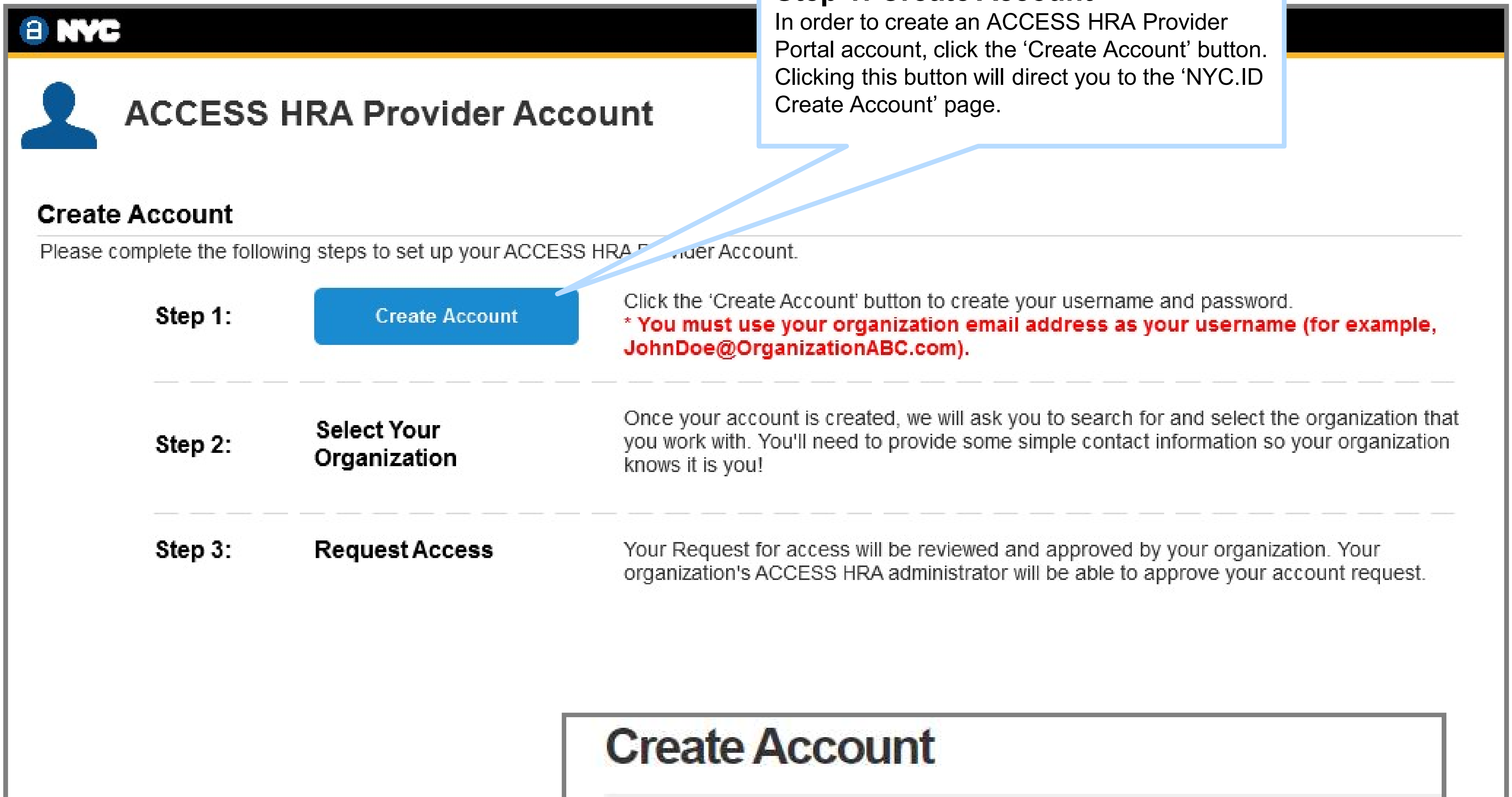
ACCESS HRA Provider Portal FAQs

ACCESS HRA Provider Portal User Guide

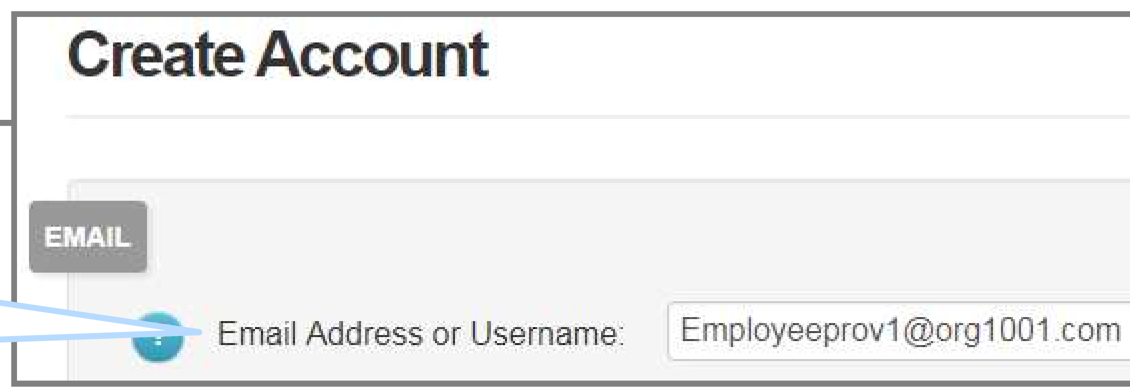
**ACCESS HRA Client Portal**
Click here to navigate to the ACCESS HRA Client Portal. Make sure to use a different browser when accessing the Client Portal.

**Get Information**
See a list of frequently asked questions regarding the Provider Portal.

# Organization Employees – Create Account

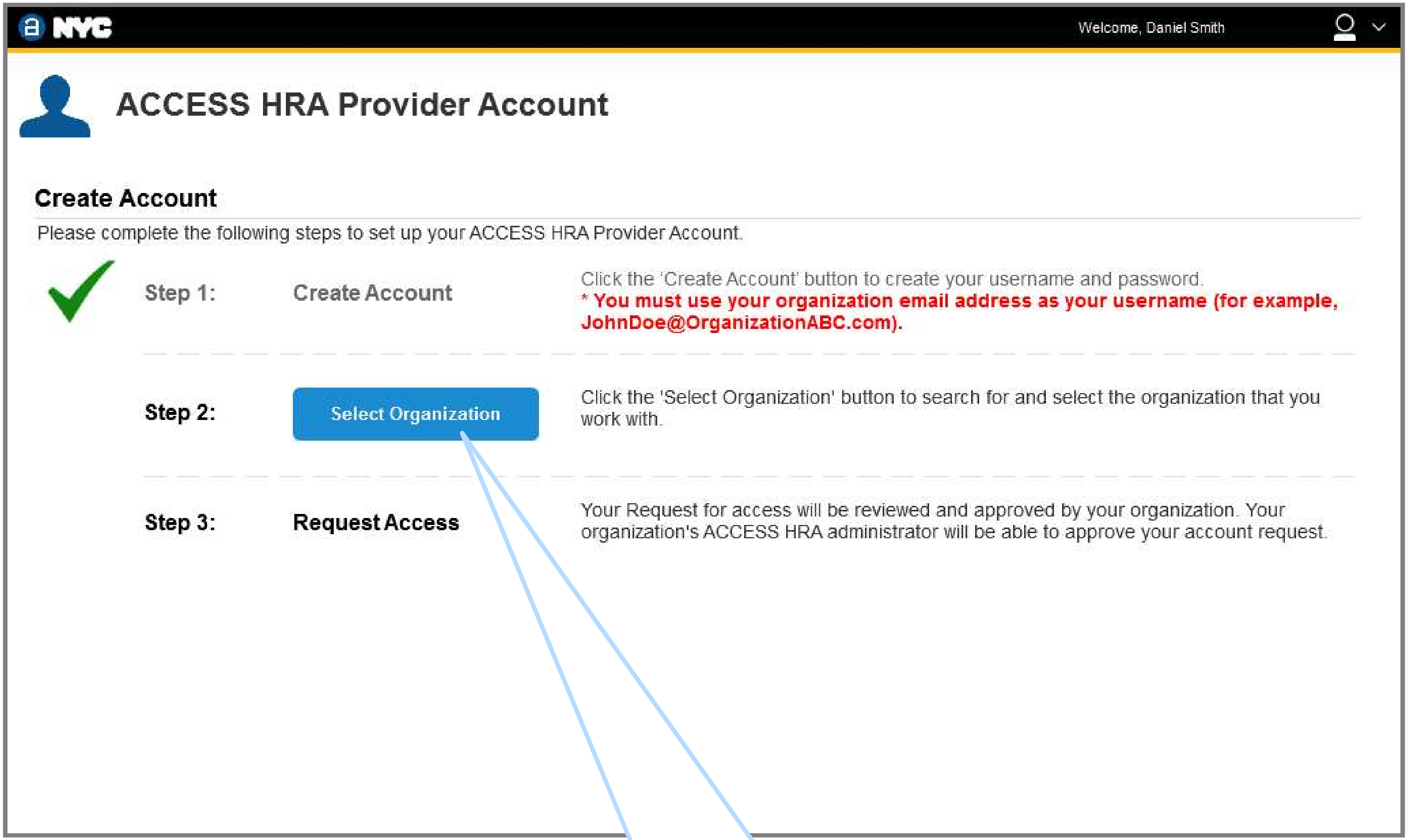



**Step 1: Create Account**
In order to create an ACCESS HRA Provider Portal account, click the 'Create Account' button. Clicking this button will direct you to the 'NYC.ID Create Account' page.



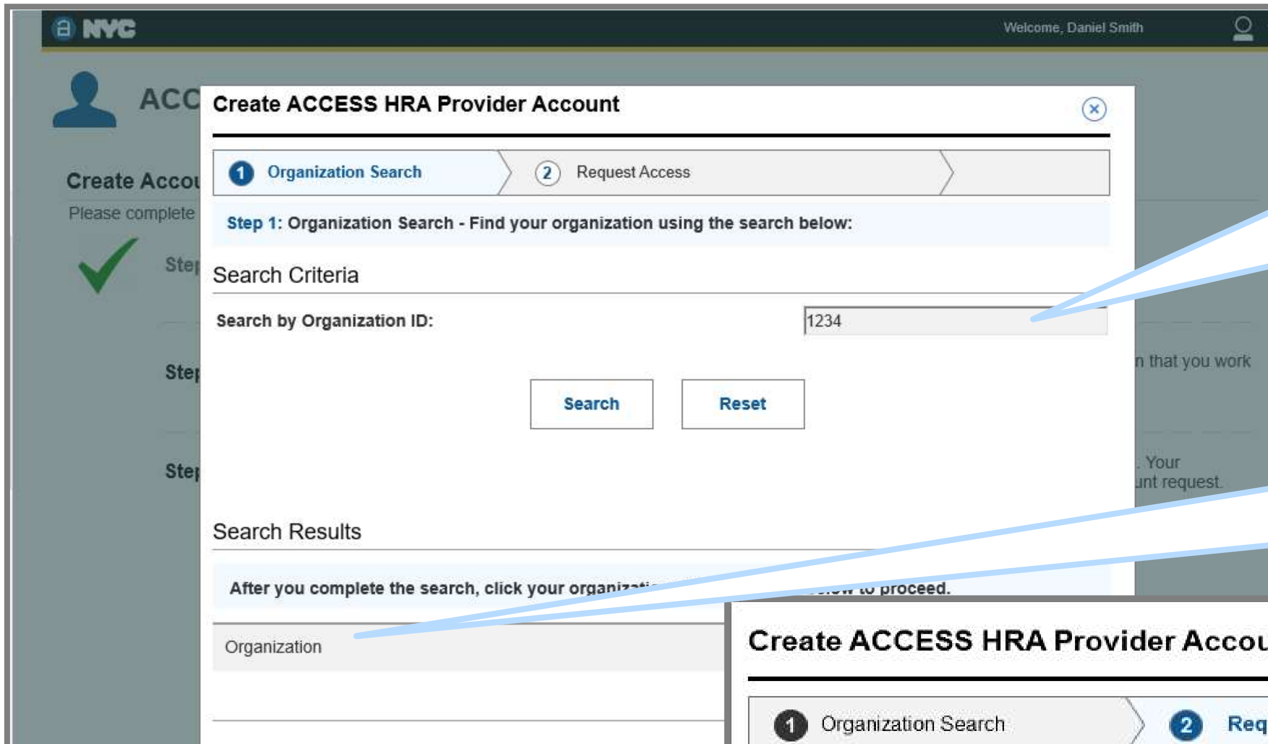

**Step 1: Create Account**
Please note that you must use your **organization email address as your username** when setting up your account.

# Organization Employees – Select Organization




**Step 2: Select Organization**
Once you have successfully created your account, log into the Provider Portal using your new credentials and click on the 'Select Organization' button.

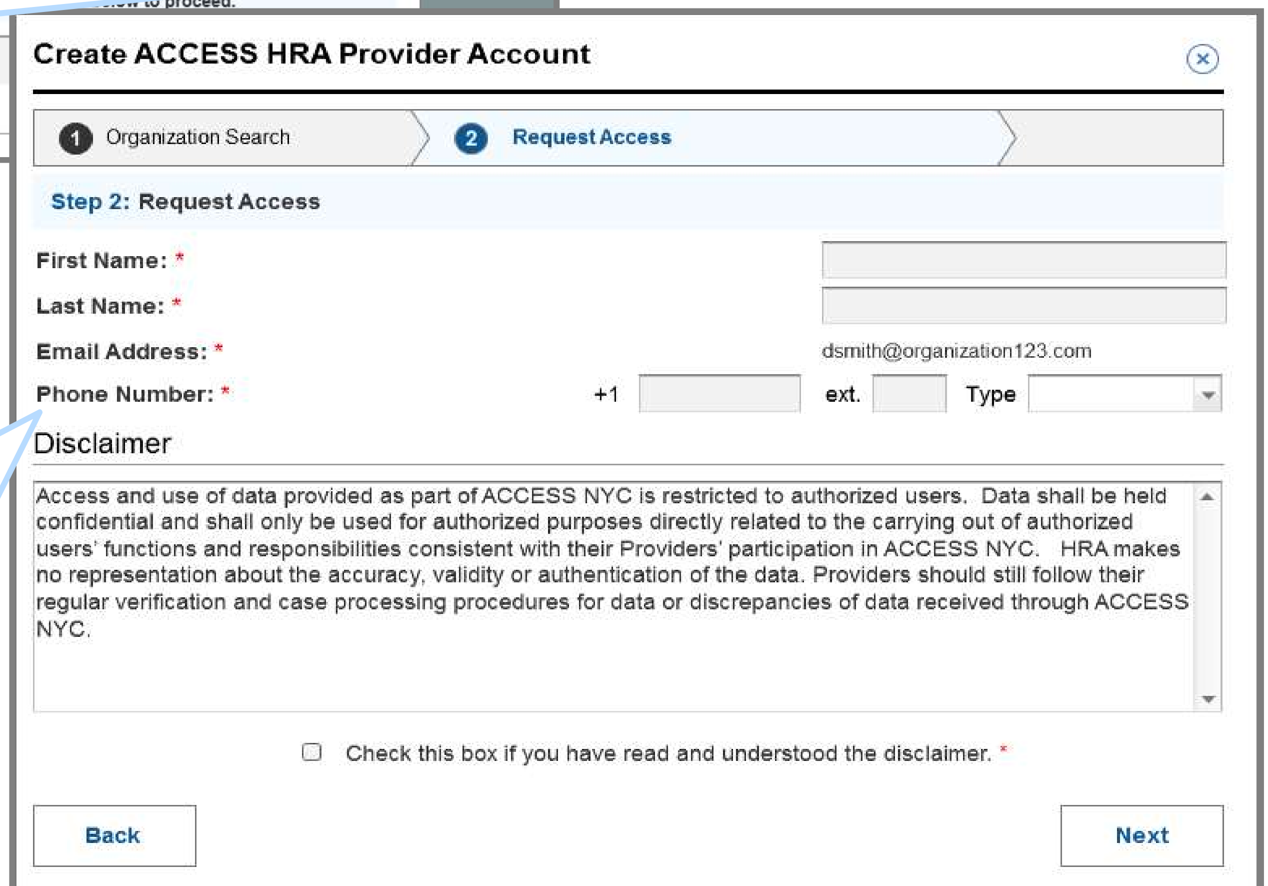
# Organization Employees – Select Organization




**Step 2: Select Organization**
On the Organization Search window, enter your Organization ID then click 'Search'.

The Organization ID is a unique 4-digit number assigned to your organization.

**Step 2: Select Organization**
Once your Organization is returned in the Search Results, click on the organization name. Clicking on this link will direct you to the 'Account Request' page.




**Step 2: Select Organization – Request Access**
Once you have selected the organization, enter your personal details here. The organization email address you entered to create the account will be prepopulated and not editable on this page.

After entering your name and phone number, mark the checkbox after reading the disclaimer. Once you click 'Next' the window will close and you will be directed back to the 'Account Request Pending Approval' page.

# Organization Employees – Request Pending

NYC  Welcome, Daniel Smith

## ACCESS HRA Provider Account

### Create Account

Please complete the following steps to set up your ACCESS HRA Provider Account.

| | | | |
|---|---|---|---|
| ✓ | Step 1: | Create Account | Click the 'Create Account' button to create your username and password.<br>*** You must use your organization email address as your username (for example, JohnDoe@OrganizationABC.com).** |
| ✓ | Step 2: | Select Your Organization | Click the 'Select Organization' button to search for and select the organization that you work with. |
| | **Step 3:** | **Request Pending** | **Your Account Request has been submitted!**<br>Please close the browser window now.<br>Your request is being reviewed by the following organization: |

**Organization 123**

212-555-1212

help@organization123.com

www.organization123.com

A notification will be sent to the email address on file once your request has been approved.
If you have a question about your pending request, please contact your organization's administrator.

**Step 3: Request Pending**
Your request is now pending with the organization administrator. Please reach out to your organization administrator directly to let them know that a request has been sent for their review. Your organization administrator will review your request and either Approve or Reject your access to the organization.

At this point, you can close the browser window as no further action is required until approval has been granted by the organization administrator.

You will be notified via email once your request has been approved.

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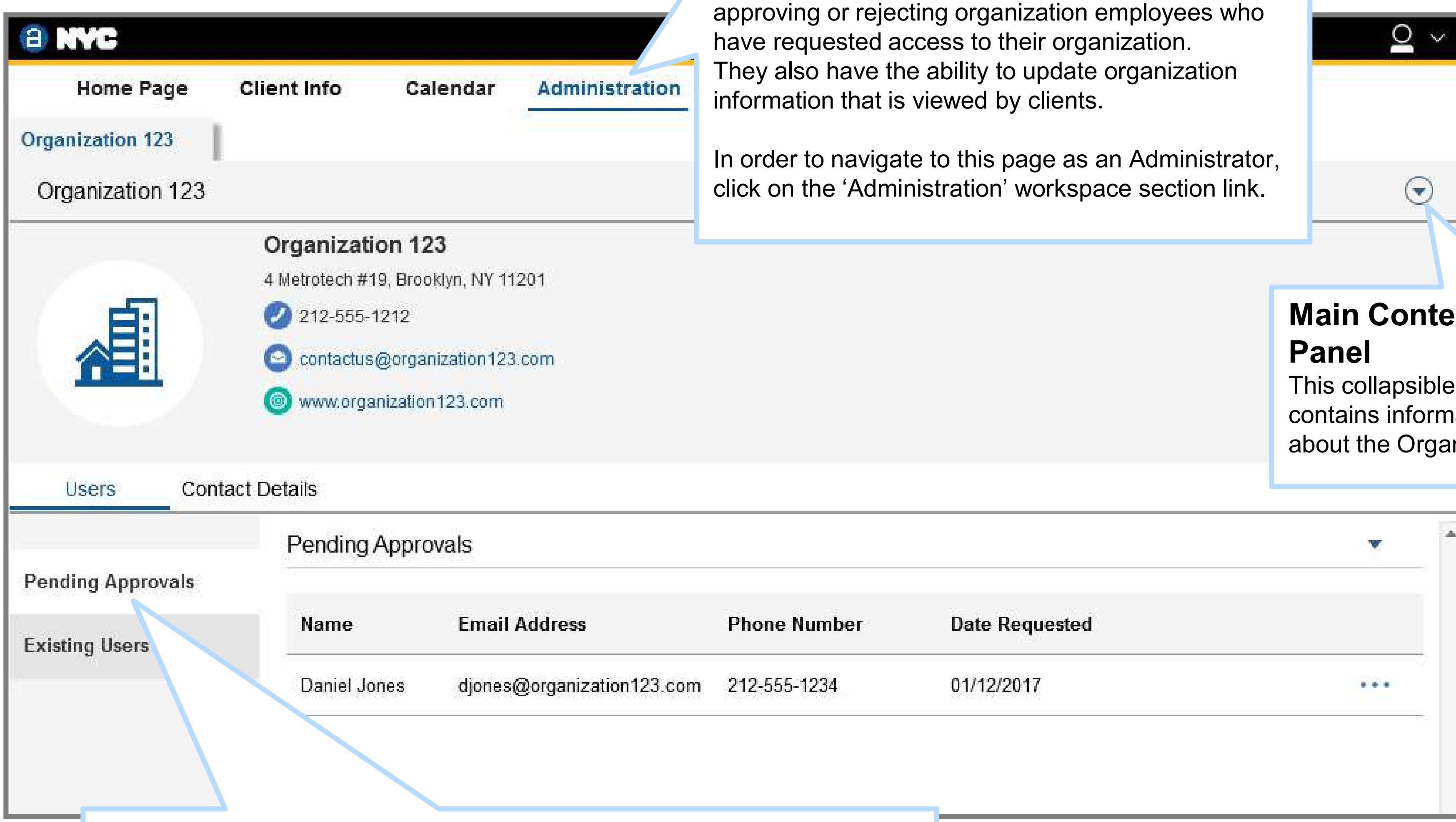
# Organization Administrators – Administrator Workspace




**Administrator Workspace**

The Organization Administrator is responsible for approving or rejecting organization employees who have requested access to their organization. They also have the ability to update organization information that is viewed by clients.

In order to navigate to this page as an Administrator, click on the 'Administration' workspace section link.

**Main Context Panel**

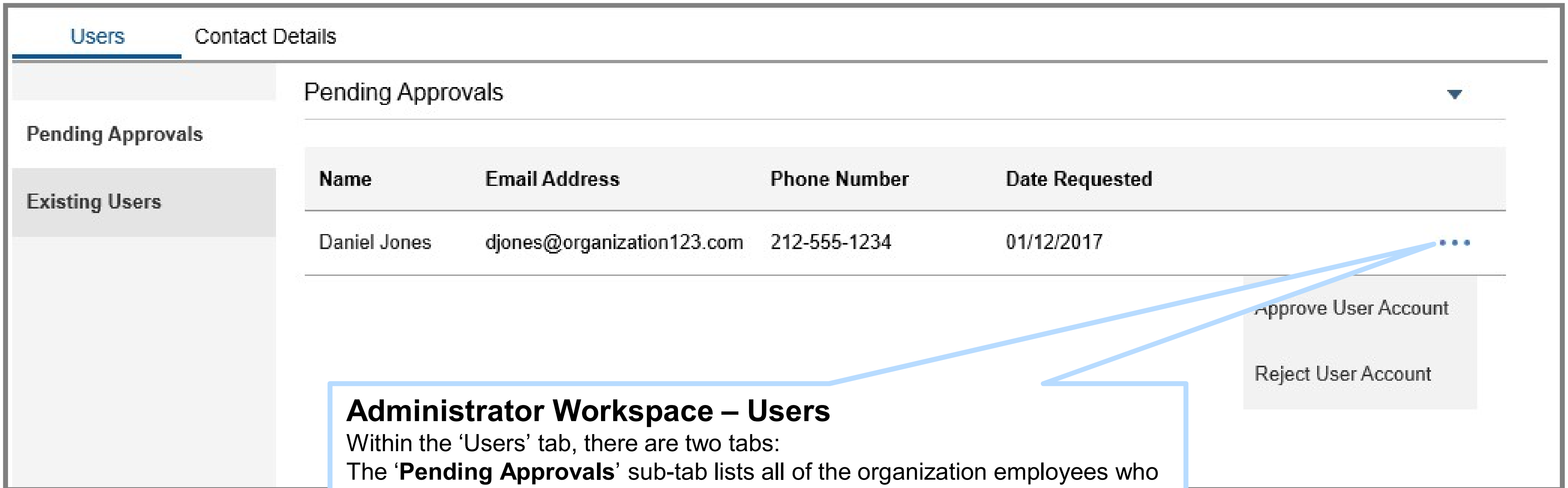
This collapsible panel contains information about the Organization.

**Administrator Workspace – Users and Contact Details**

The 'Users' context panel tab is where the Organization Administrator can view all organization employees associated to the organization or approve/reject new employees, remove existing employees, and update the security role of current organization employees.

The 'Contact Details' context panel tab is where the organization information such as Address, Phone Number, Email Address, and Website can be updated.

# Organization Administrators – Pending Approvals




**Administrator Workspace – Users**

Within the 'Users' tab, there are two tabs:

The '**Pending Approvals**' sub-tab lists all of the organization employees who have requested access to the organization. Administrators can do one of the following:

- Approve the account which will allow the employee to view accounts of clients who have given access to the Organization.
- Reject the account request which will remove the user from the list of users pending approval.

The '**Existing Users**' sub-tab lists all of the organization employees who are currently associated to the organization.

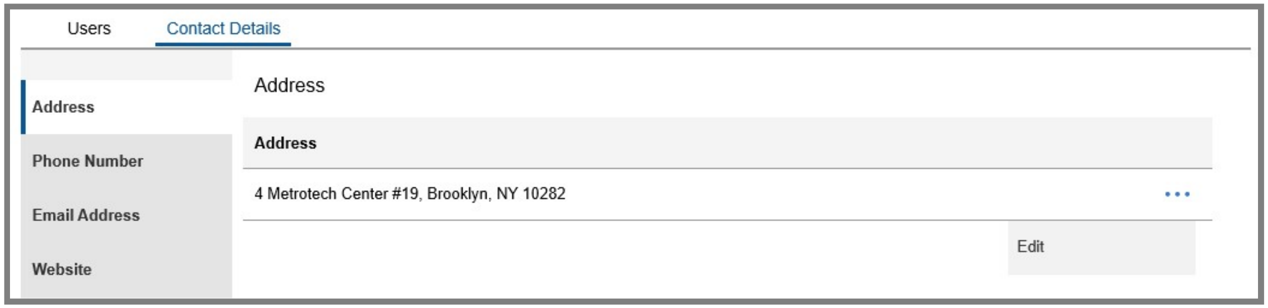
# Organization Administrators – Existing Users

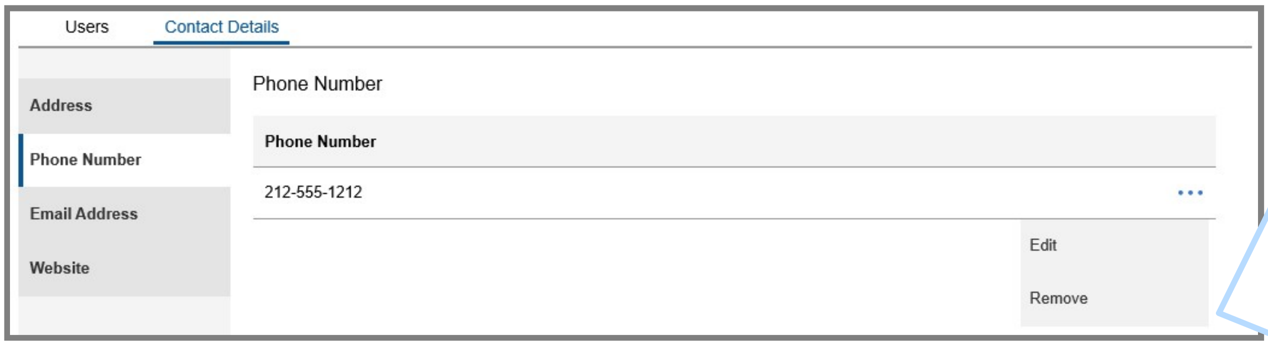

**Administrator Workspace - Existing Users**

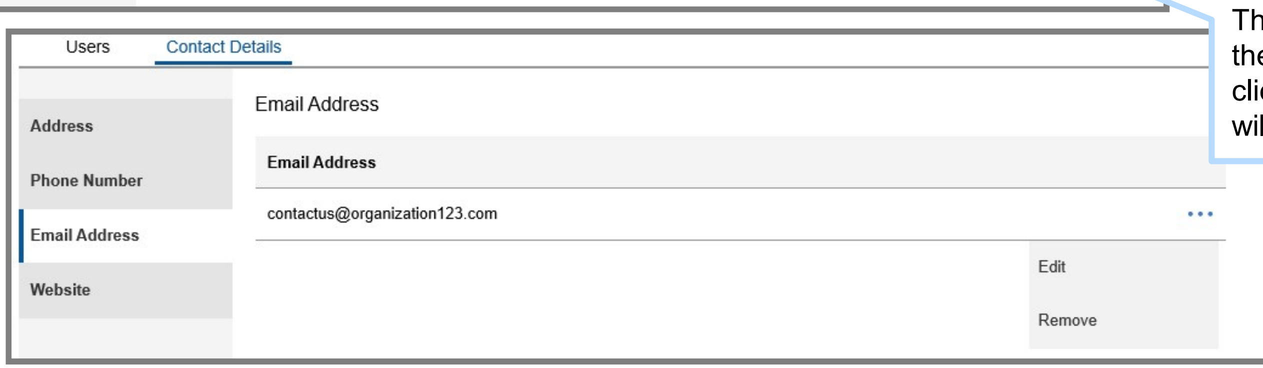
The ‘Existing Users’ sub-tab lists all of the organization employees who are currently associated to the organization. Administrators can do one of the following when they click the ellipsis (…) next to the employee’s name :

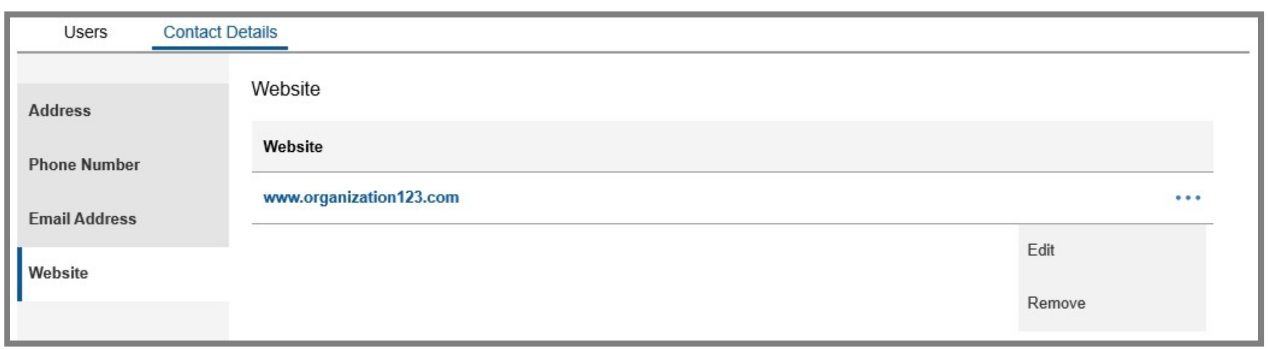
- ‘**Remove User**’ which removes the organization employee’s access to the organization
- ‘**Make Administrator**’ which grants the organization employee administrative privileges
- **‘Remove Administrative Rights**’ which removes the organization employee’s administrative privileges
- ‘**View Activity**’ which opens a window and displays actions made in the past week and includes information such as the employee’s name, the activity performed, the date and time of the activity, and the client’ name associated with the activity

# Organization Administrators – Contact Details




## Contact Details

When the Administrator clicks on the ‘Contact Details’ context panel tab, the Administrator will have access to update contact details for their organization. This information displays to the organization employee in various places throughout the application.

The following information is required for the organization and can only be edited:

- Address

The following information can be updated or removed:

- Phone Number
- Email Address
- Website

The updates made here will be reflected in the ACCESS HRA Client Portal. When the client searches for your organization, they will see the updated information.

# User Workspace

## Pod Actions

The following actions can be taken within each pod:

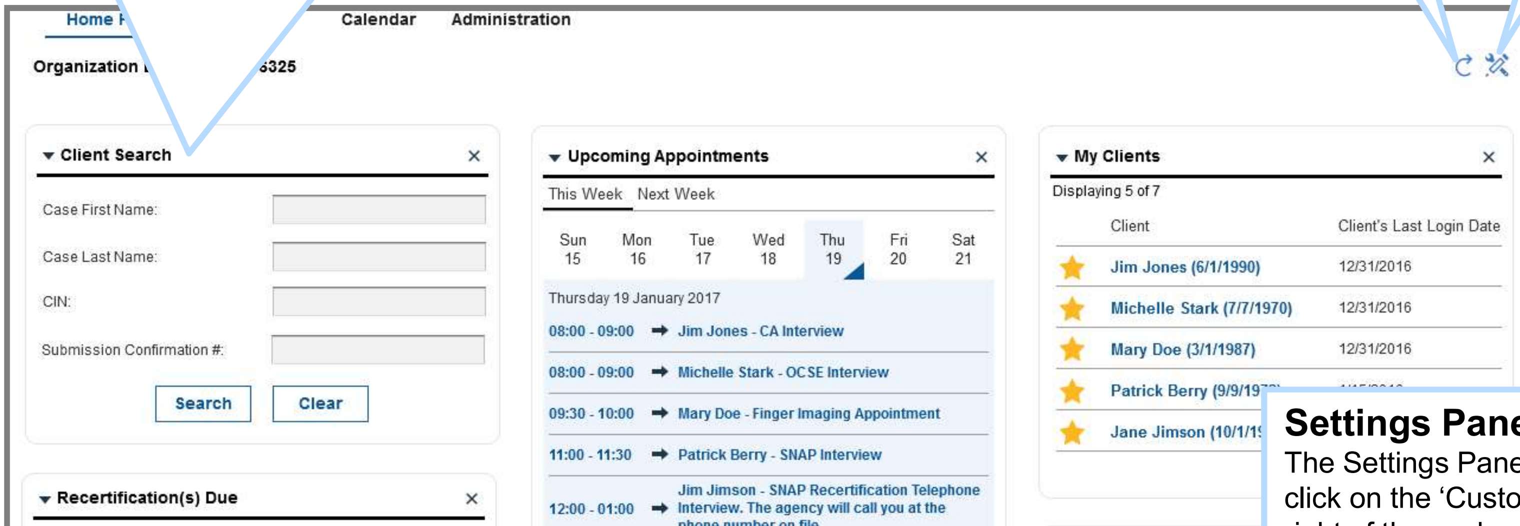
- **Minimize pod:** The 'Minimize' option is displayed at the top left corner next to the pod header. Clicking the arrow will collapse the pod to display only the header. Clicking the arrow again will expand the pod and display its contents.
- **Remove pod** – Clicking the 'x' at the top right corner of any pod will remove the pod from your workspace.
- **Move pod** – If you would like to update the default display of the pods, you can click on the header of the pod and drag it to another spot within the workspace.

## Refresh

An organization employee can click on the 'Refresh' icon to refresh the entire workspace. Each pod will be reloaded with the latest data.

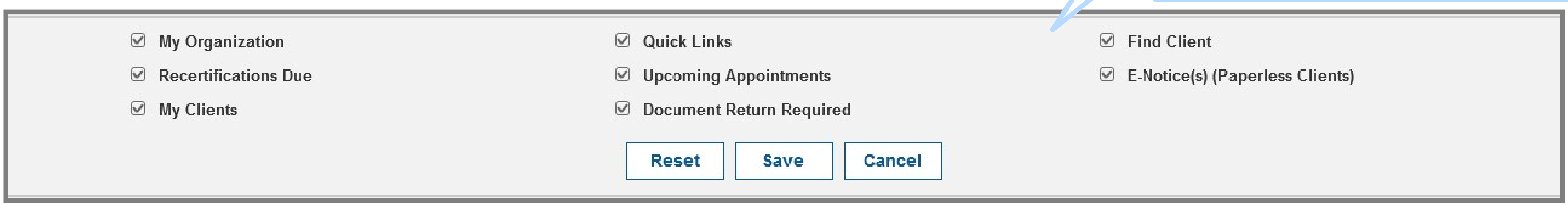
## Customize Workspace

An organization employee can click on the 'Customize' icon to rearrange the pods displayed on the workspace.



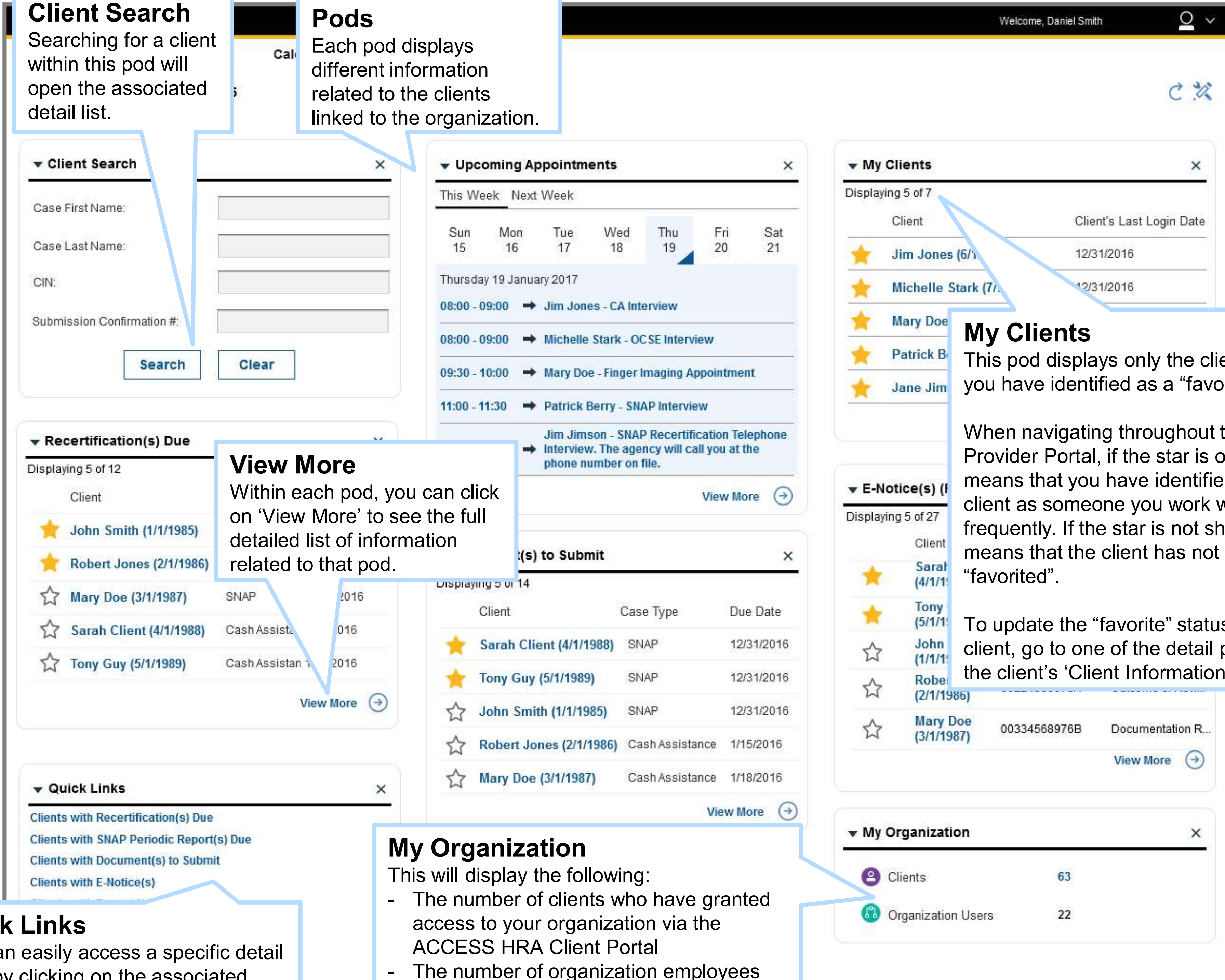

## Settings Panel

The Settings Panel is displayed when you click on the 'Customize' icon at the top right of the workspace. The Settings Panel displays all of the available pods for you to check if you want to display the pod or uncheck if you want to remove the pod from the workspace. Click 'Save' to apply your changes.



# User Workspace

ACCESS HRA YOUR WAY




**Client Search**
Searching for a client within this pod will open the associated detail list.

**Pods**
Each pod displays different information related to the clients linked to the organization.

**My Clients**
This pod displays only the clients who you have identified as a "favorite".

When navigating throughout the Provider Portal, if the star is orange, this means that you have identified this client as someone you work with frequently. If the star is not shaded, this means that the client has not been "favorited".

To update the "favorite" status of the client, go to one of the detail pages or to the client's 'Client Information' page.

**View More**
Within each pod, you can click on 'View More' to see the full detailed list of information related to that pod.

**Quick Links**
You can easily access a specific detail page by clicking on the associated quick link within this pod.

**My Organization**
This will display the following:
- The number of clients who have granted access to your organization via the ACCESS HRA Client Portal
- The number of organization employees currently associated to the organization.

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# Detail Page – Client Search

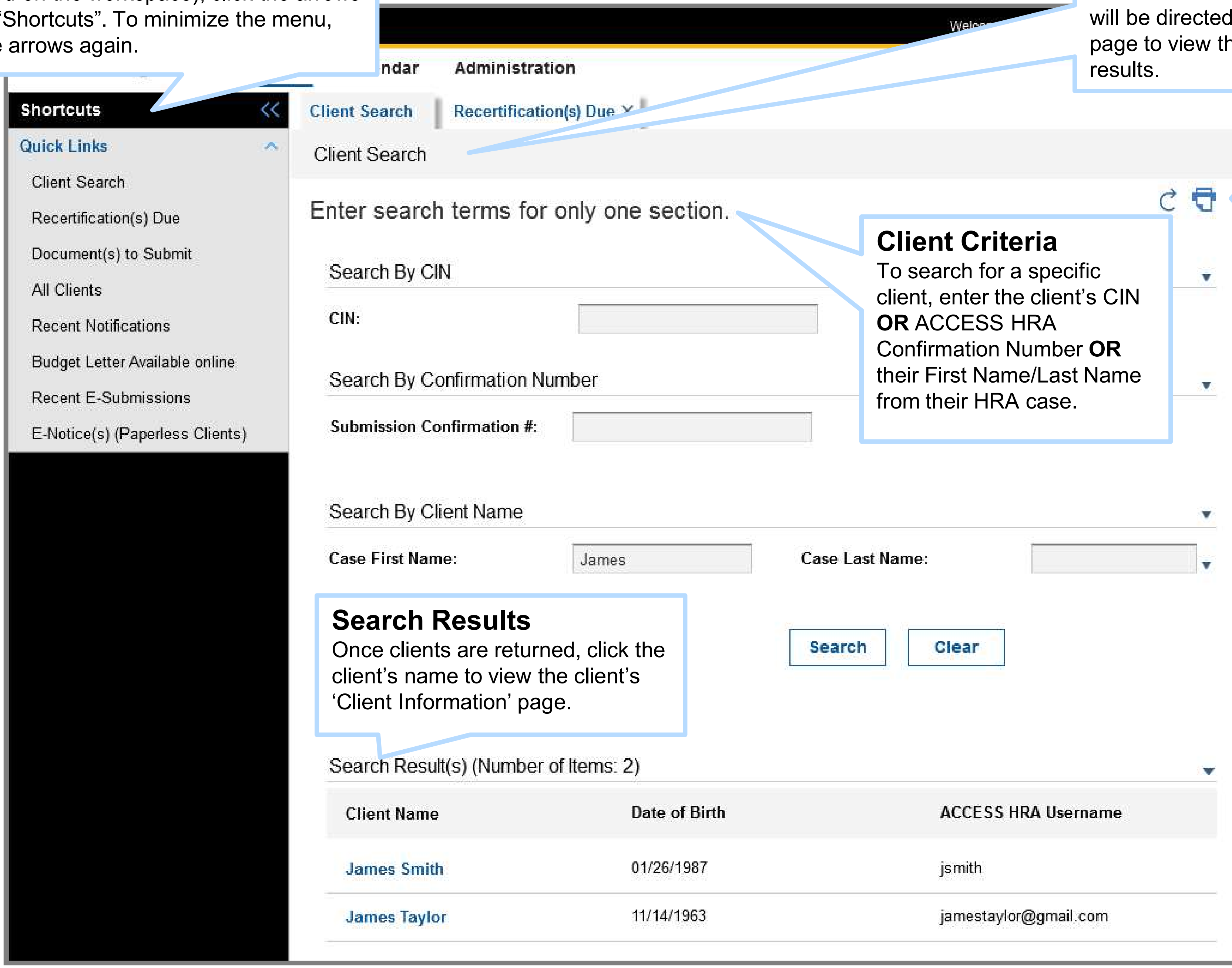
**Shortcuts**
To expand the list of quick links (also displayed on the workspace), click the arrows next to “Shortcuts”. To minimize the menu, click the arrows again.

**Client Search**
If you enter client information into the ‘Client Search’ pod on the user workspace, you will be directed to this detail page to view the returned results.

**Print**
On any detail page, you can click the ‘Print’ icon to print the information on the page.

**Client Criteria**
To search for a specific client, enter the client’s CIN **OR** ACCESS HRA Confirmation Number **OR** their First Name/Last Name from their HRA case.

**Search Results**
Once clients are returned, click the client’s name to view the client’s ‘Client Information’ page.



# Detail Page – All Clients

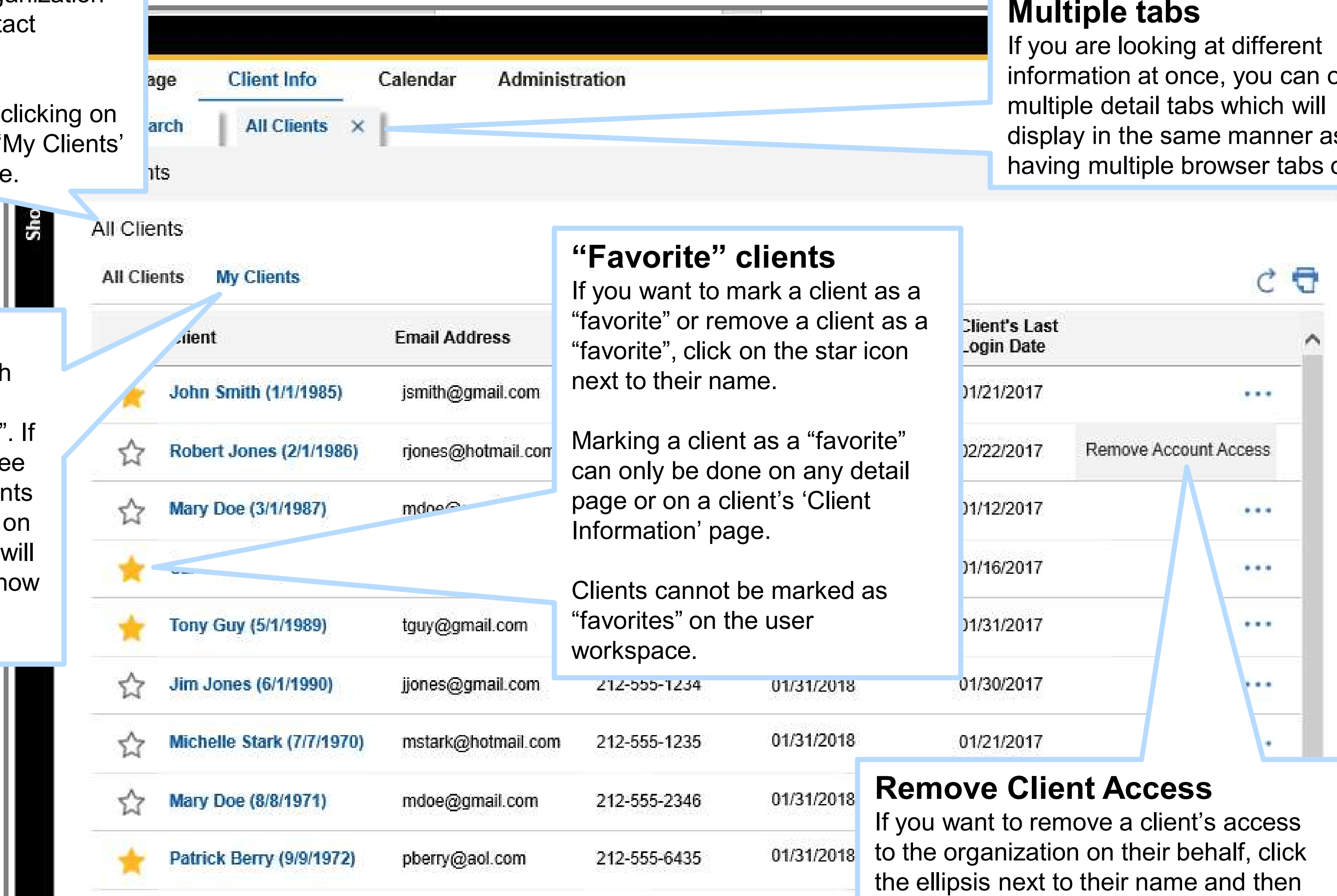
## All Clients

This page displays all of the clients who have linked to the organization as well as the client's contact information.

This page is accessed by clicking on the 'All Clients' link in the 'My Clients' pod on the user workspace.

## Multiple tabs

If you are looking at different information at once, you can open multiple detail tabs which will display in the same manner as having multiple browser tabs open.




## My Clients

The default display of each detail page will be the information for "All Clients". If you would prefer to only see the information for the clients you have "favorited", click on the "My Clients" link. This will refresh the page to only show the clients you have "favorited".

## "Favorite" clients

If you want to mark a client as a "favorite" or remove a client as a "favorite", click on the star icon next to their name.

Marking a client as a "favorite" can only be done on any detail page or on a client's 'Client Information' page.

Clients cannot be marked as "favorites" on the user workspace.

## Remove Client Access

If you want to remove a client's access to the organization on their behalf, click the ellipsis next to their name and then click "Remove Account Access".

If the client is unlinked from the organization, this means that the client's data will no longer be accessible to any organization employees associated to the organization.

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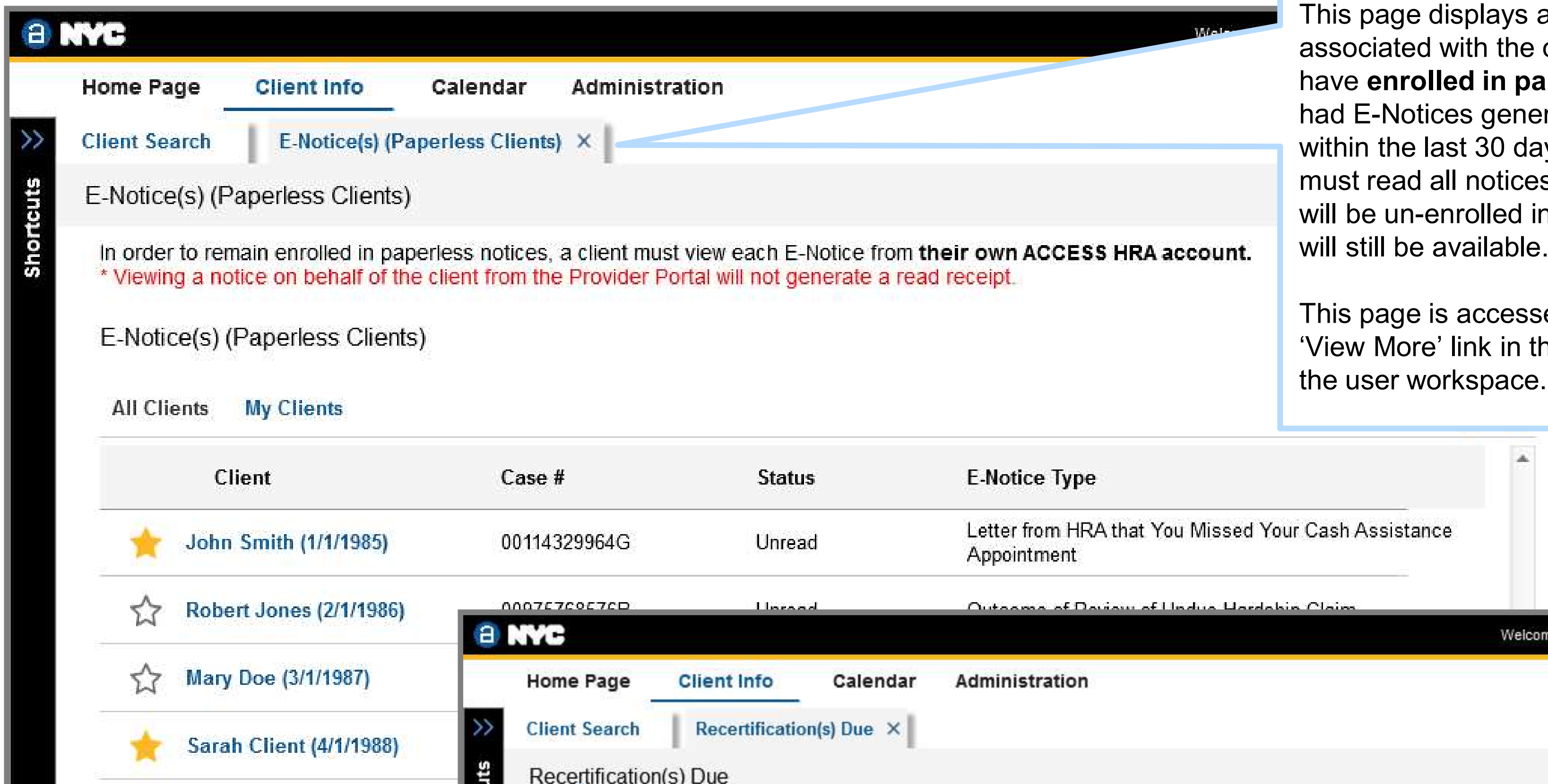
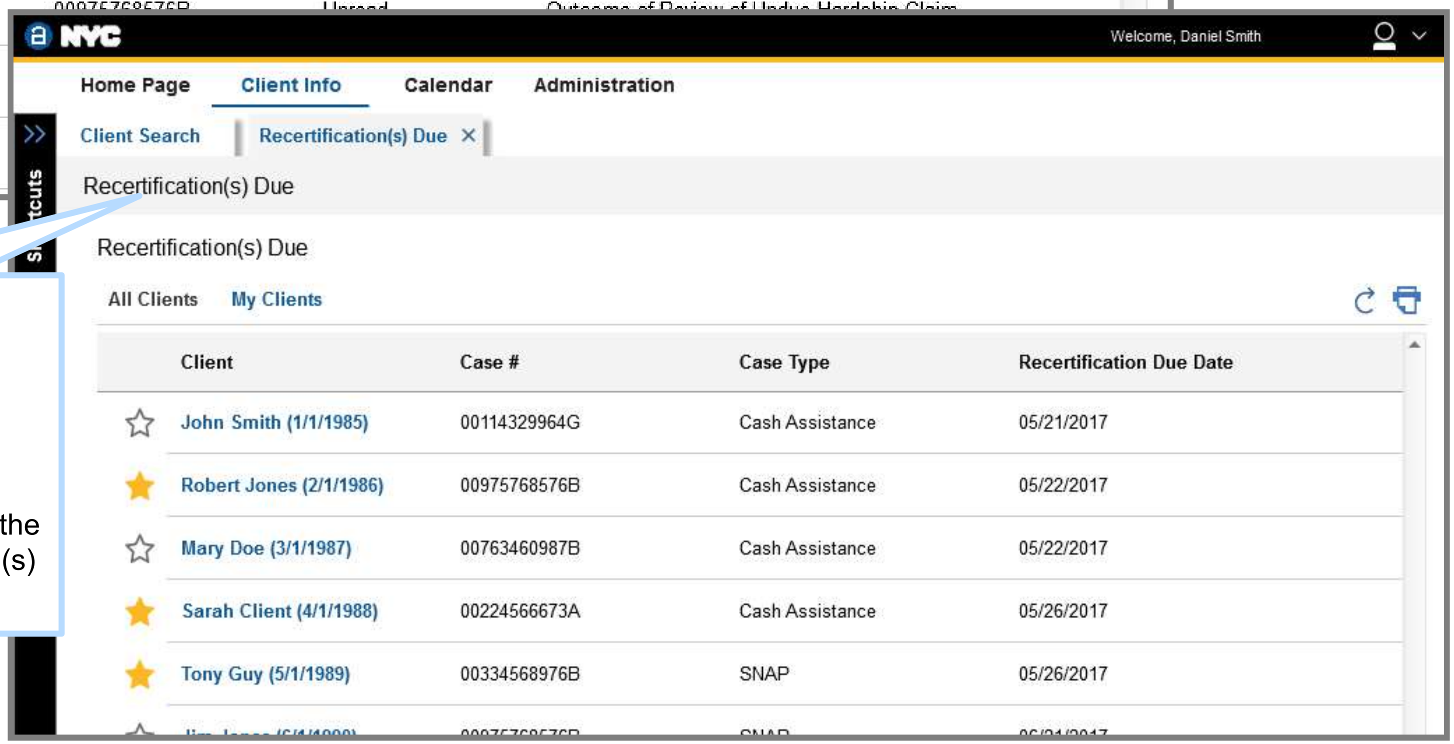
# Detail Pages

## E-Notice(s) (Paperless Clients)

This page displays a list of clients associated with the organization, and who have **enrolled in paperless notices** and had E-Notices generated for their account within the last 30 days. Paperless clients must read all notices within 30 days or they will be un-enrolled in Paperless. E-notices will still be available.

This page is accessed by clicking on the 'View More' link in the 'E-Notice(s)' pod on the user workspace.




## Recertification(s) Due

This page displays a list of clients associated with the organization who have a SNAP or Cash Assistance Recertification coming due soon.

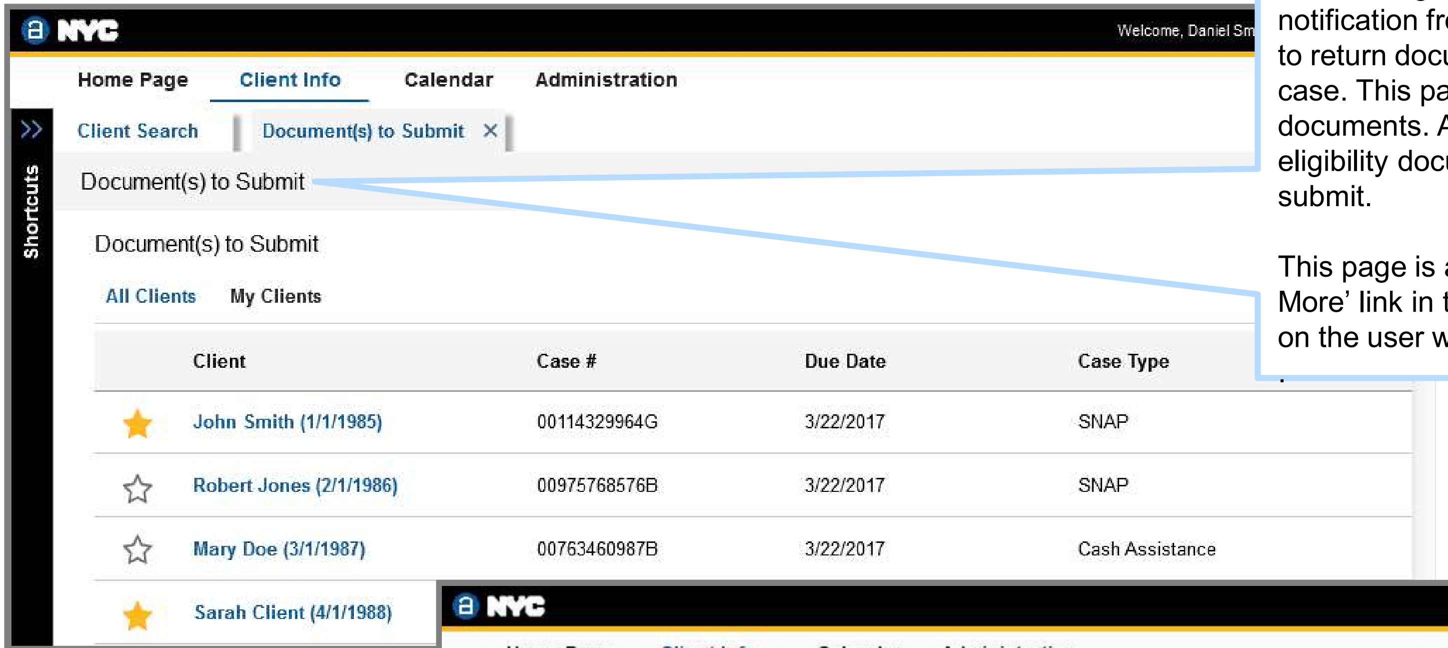
This page is accessed by clicking on the 'View More' link in the 'Recertification(s) Due' pod on the user workspace.

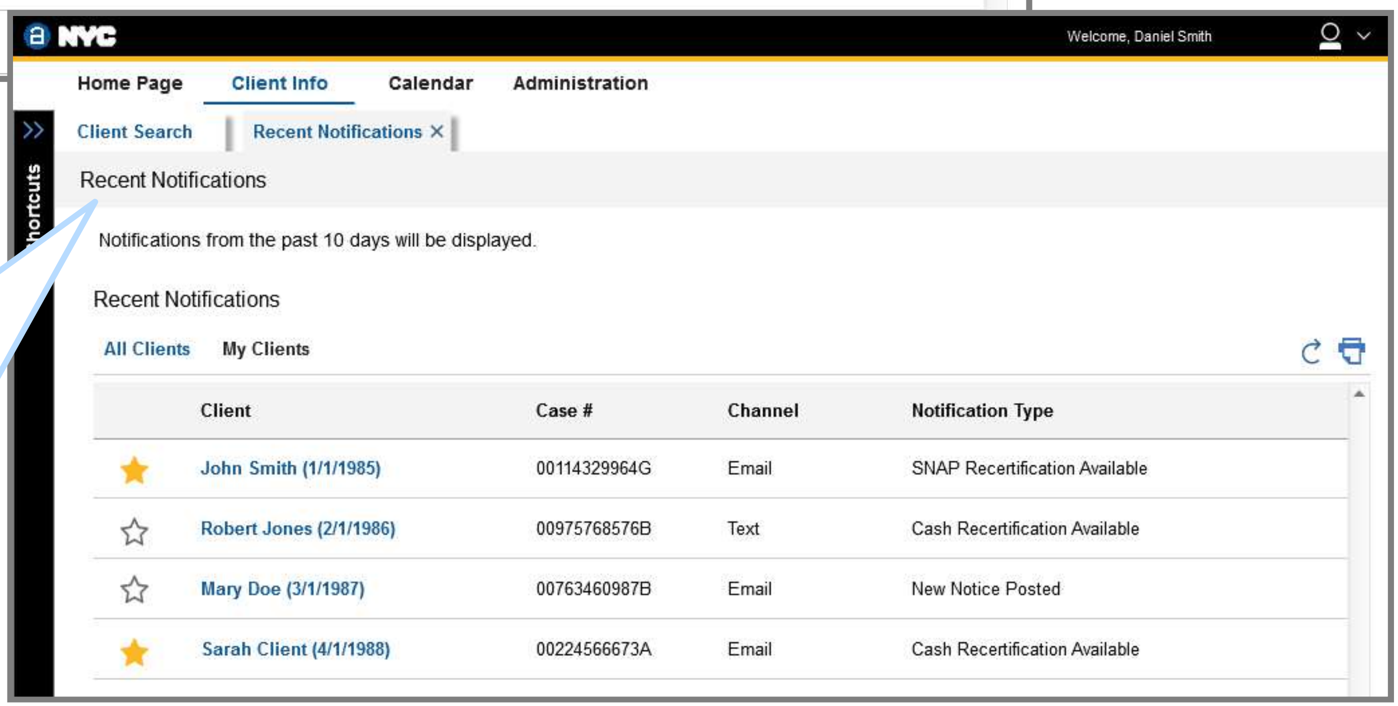
# Detail Pages

## Document(s) to Submit

This page displays a list of clients associated with the organization who have received a notification from ACCESS HRA that they need to return documents for their SNAP or Cash case. This page does not list the specific documents. An e-notice is available listing the eligibility documents the client is required to submit.

This page is accessed by clicking on the 'View More' link in the 'Document(s) to Submit' pod on the user workspace.




## Recent Notifications

This page displays a list of clients associated with the organization who have been recently notified by text or email from ACCESS HRA for a case action. This list will show all notifications that have been sent from ACCESS HRA to the client within the last 10 days.

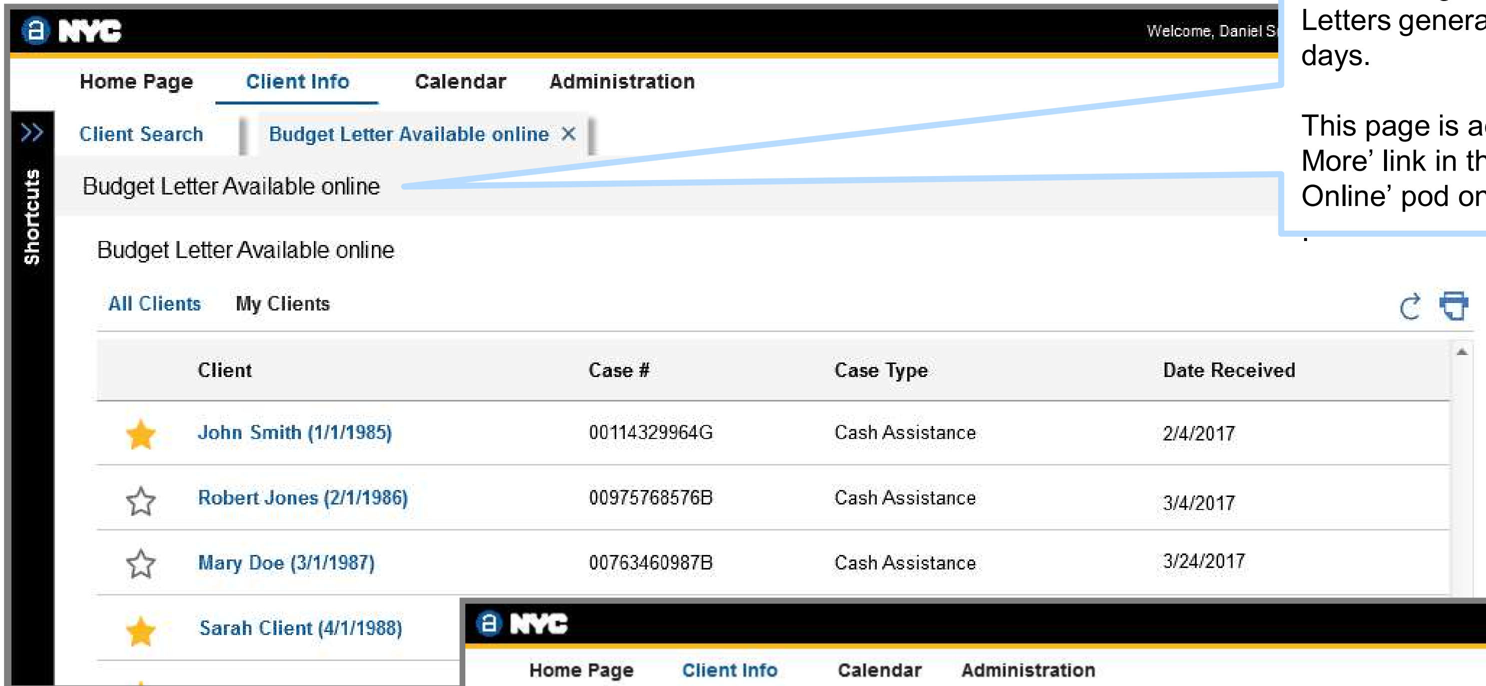
This page is accessed by clicking on the 'View More' link in the 'Recent Notifications' pod on the user workspace.

# Detail Pages

## Budget Letter Available Online

This page displays a list of clients associated with the organization who have had Budget Letters generated for clients within the last 30 days.

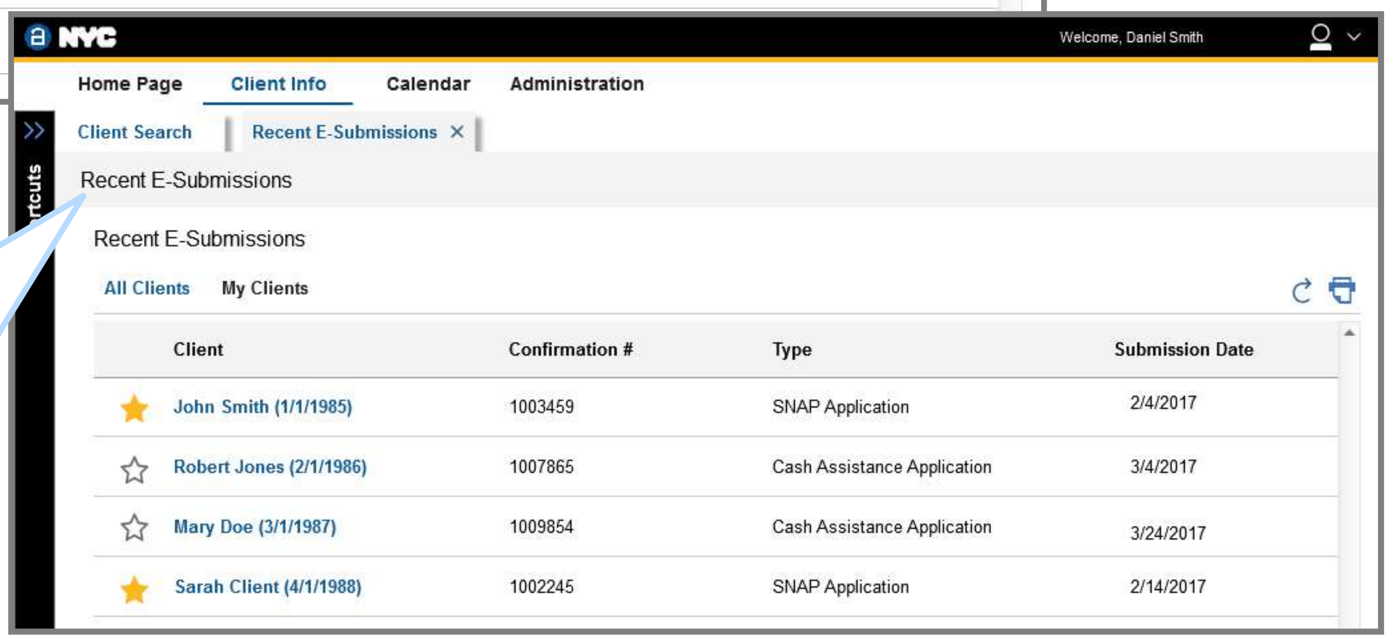
This page is accessed by clicking on the 'View More' link in the 'Budget Letter Available Online' pod on the user workspace.




## Recent E-Submissions

This page displays a list of clients associated with the organization who have recently submitted applications through ACCESS HRA within the last 30 days. This will not display applications submitted via mail or fax.

This page is accessed by clicking on the 'View More' link in the 'Recent E-Submissions' pod on the user workspace.

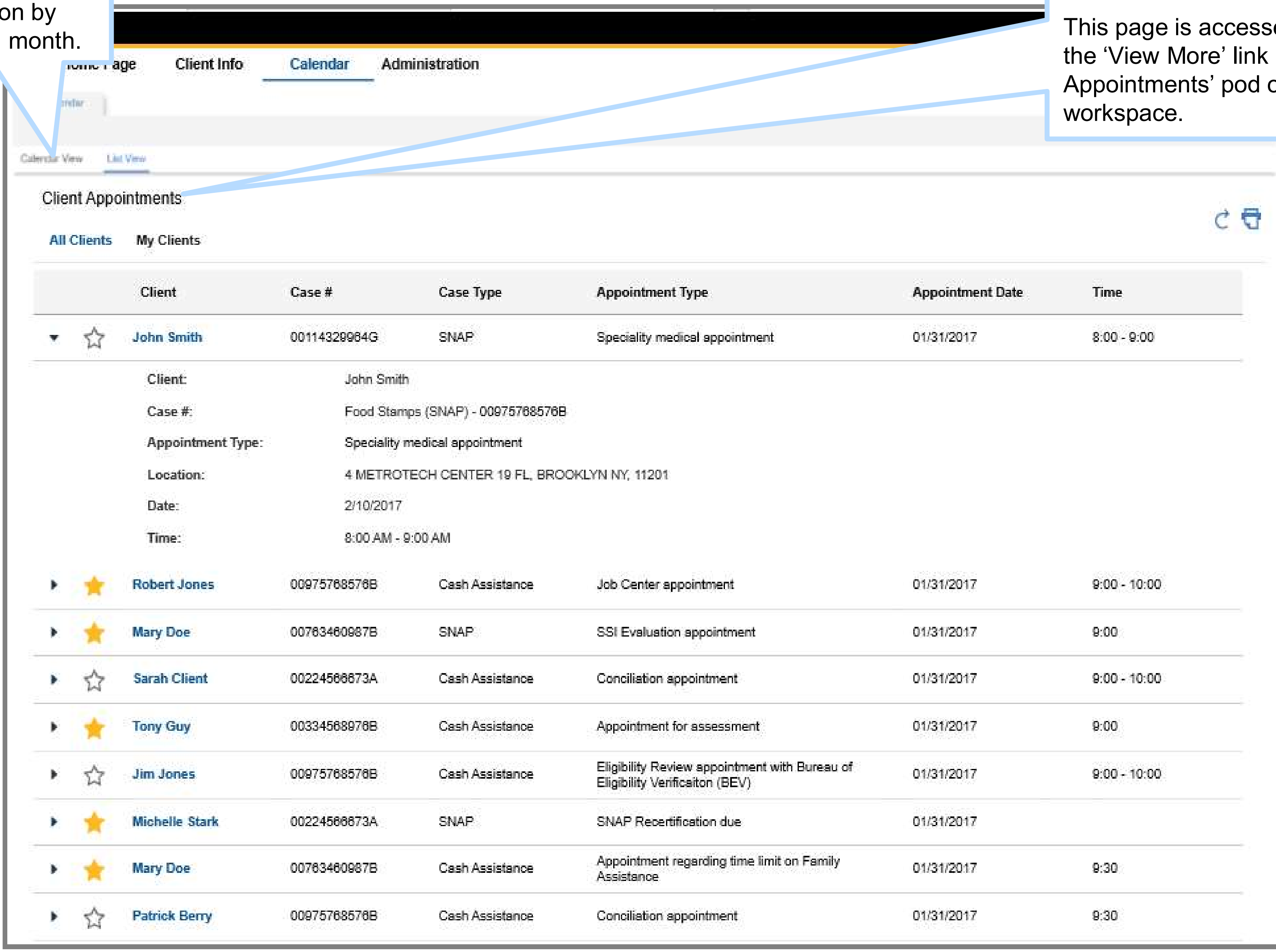


# Detail Pages

**Views**
Click on the 'Calendar View' link to see appointments for the clients associated to your organization by day, week, and month.

**Client Appointments**
This page displays a list of clients associated with the organization who have an upcoming appointment.

This page is accessed by clicking on the 'View More' link in the 'Upcoming Appointments' pod on the user workspace.



# Client Home Page

## Client Home Page

This page displays all of the information related to a specific client. This page can be accessed by clicking the client's name on any of the detail pages or in the user workspace.

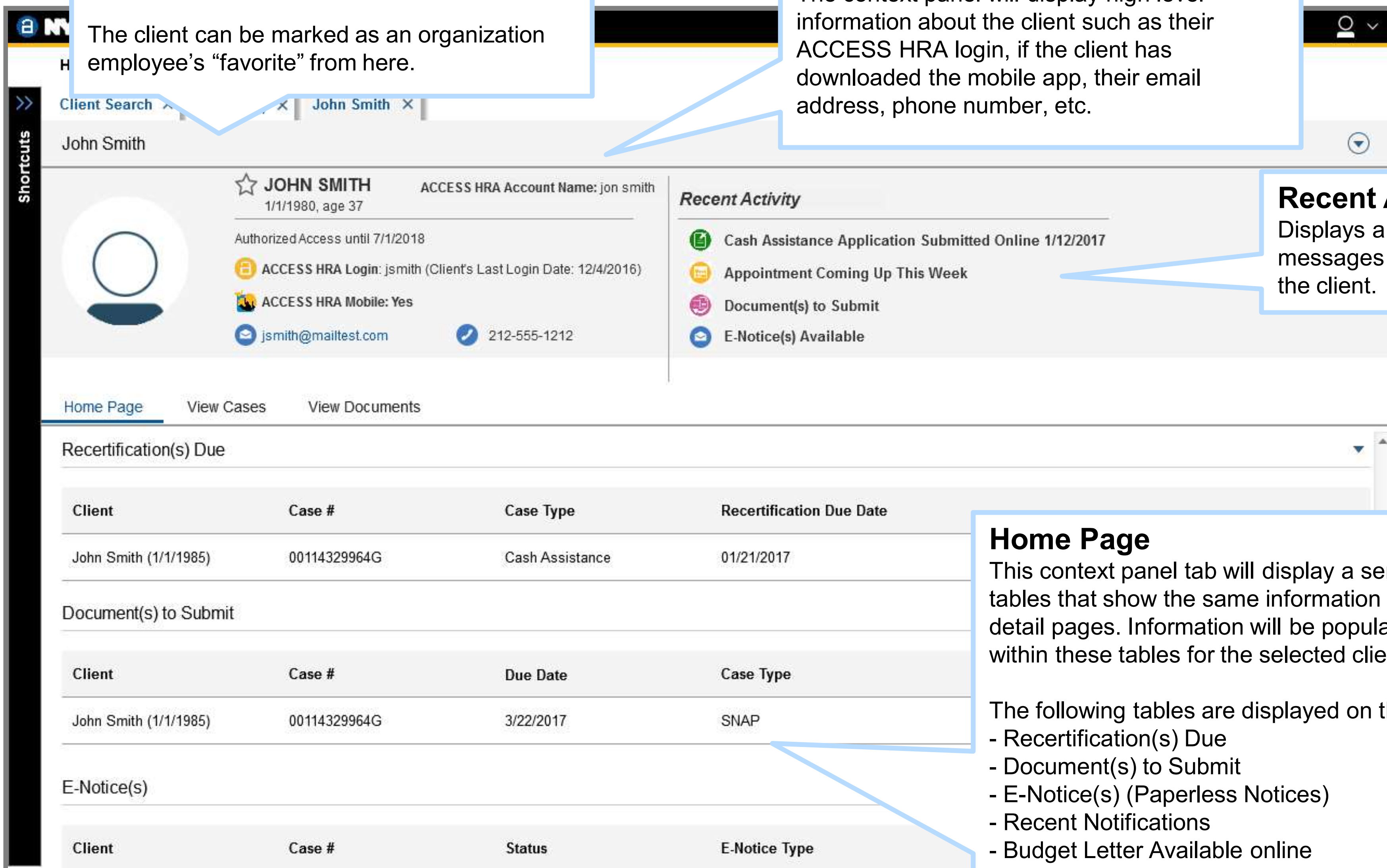
The client can be marked as an organization employee's "favorite" from here.

## Context Panel

The context panel will display high level information about the client such as their ACCESS HRA login, if the client has downloaded the mobile app, their email address, phone number, etc.

## Recent Activity

Displays a list of relevant messages that pertain to the client.



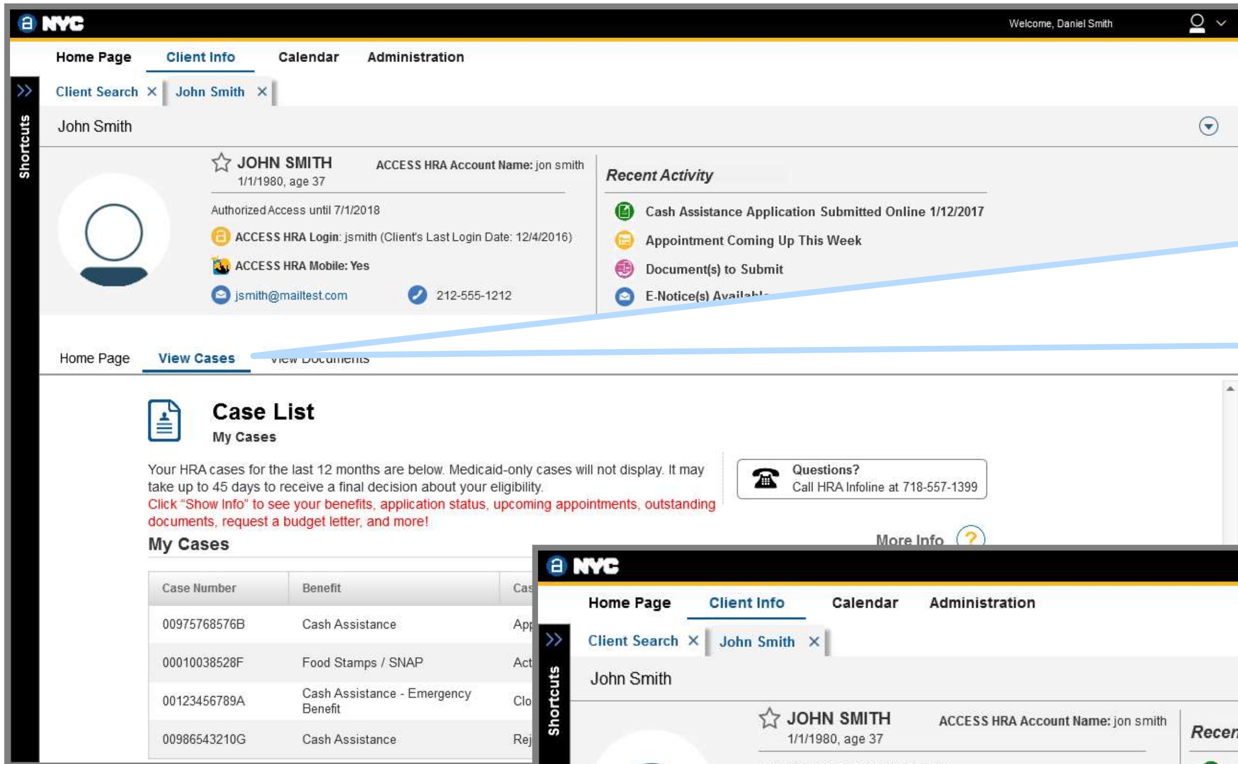

## Home Page

This context panel tab will display a series of tables that show the same information as the detail pages. Information will be populated within these tables for the selected client only.

The following tables are displayed on this page:

- Recertification(s) Due
- Document(s) to Submit
- E-Notice(s) (Paperless Notices)
- Recent Notifications
- Budget Letter Available online
- Recent E-Submissions

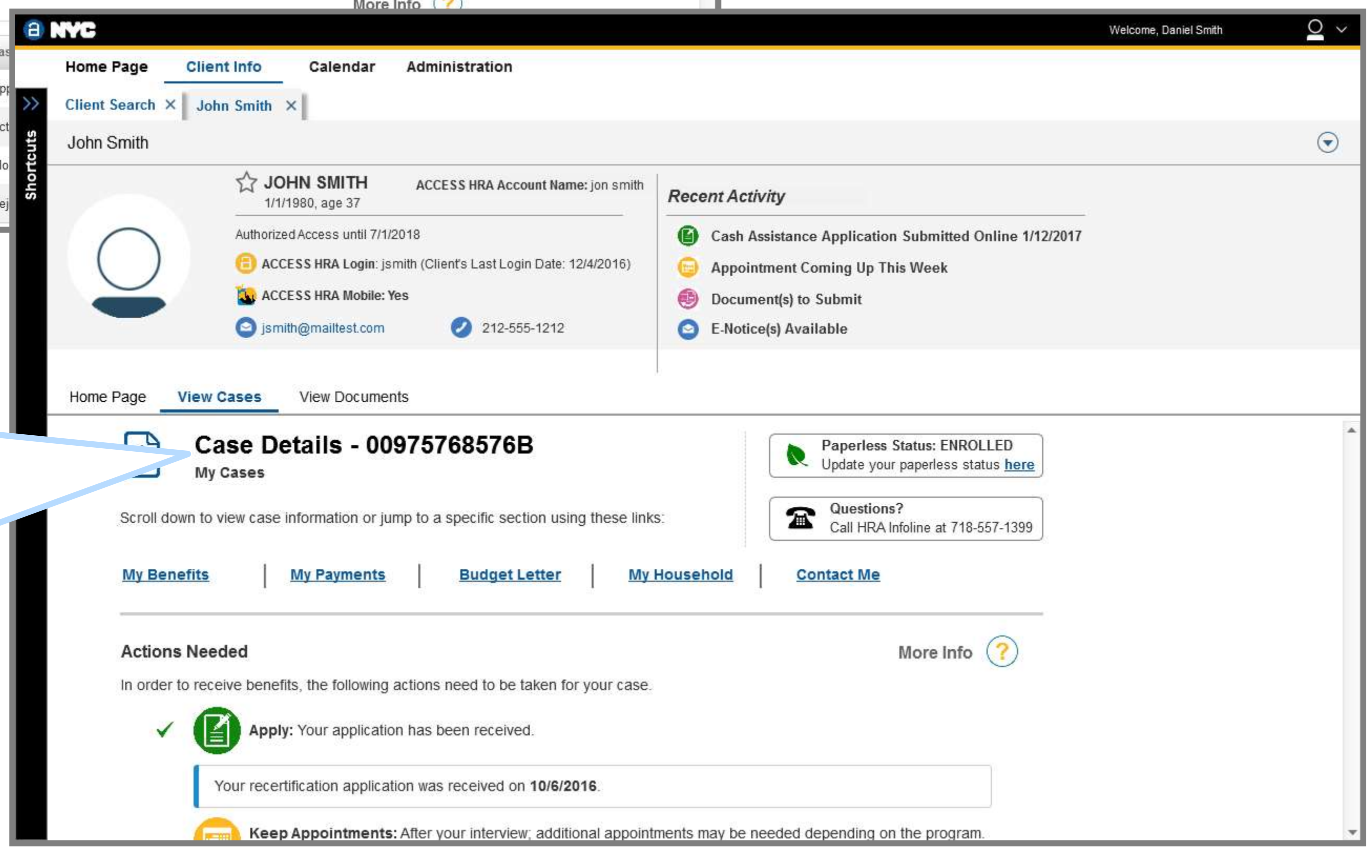
# Client Home Page – View Cases




## View Cases – Case List

From the Client Home Page Context Panel, you will be able to select the 'View Cases' Context Panel tab for the client. This will make a real time call to retrieve the data for cases associated to the client.

The information displayed here is the same information that the client sees on the 'My Cases' page in the ACCESS HRA Client Portal.




## View Cases – Case Details

Click on the 'Show Info' link to access the 'Case Details' page for the selected case.

On this page, you will be able to request a budget letter for the case and make updates to contact information on behalf of the client.

Once an update is made on this page, a notification will be sent to the client to inform them of the update.

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# Client Home Page – Case Updates

## Case Details - 00012345678A

My Cases

Scroll down to view case information or jump to a specific section using these links:

Paperless Status: ENROLLED
Update your paperless status here

Questions?
Call HRA Infoline at 718-557-1399

My Benefits | My Payments | Budget Letter | My Household | Contact Me

**Request Budget Letter**
Lets you request a budget letter online on behalf of the client. It is sent to the mailing address that HRA has on file for the client's case. It is also available on the 'My Documents' page the next business day.

More Info ?

### Budget Letter

Top of

You can request budget information related to this case. Once the Budget Letter has been requested, it will be mailed to your address on file.

Request Budget Letter

More Info ?

### My Household

Top of Page

**Residence Address:**

4 METROTECH CENTER
BROOKLYN, NY 11201

**Mailing Address:**

Your Mailing address is the same as your Residence address on file.

**Reasonable Accommodations:**

Help for People Who Are Deaf or Hard of Hearing

IN EFFECT

| Case Member | CA Status | SNAP Status | MA Status |
|---|---|---|---|
| Jon Doe (1/1/1980) | Active | Active | Active |
| Mary Doe (2/2/1982) | Applying | Applying | Applying |
| Erin Doe (4/4/1990) | Closed | Closed | Closed |

# Client Home Page – Case Updates

## Case Details - 00012345678A

My Cases

Scroll down to view case information or jump to a specific section using these links:

My Benefits | My Payments | Budget Letter | My Household | Contact Me

Paperless Status: ENROLLED
Update your paperless status here

Questions?
Call HRA Infoline at 718-557-1399

Contact Me

More Info ?

The contact infor

Edit or Enroll

Email Address on file: jondoe@gmail.com
Is your Email Verified? Not Verified

Primary Phone Number: 212-555-7777 Cell
Alternate Phone Number: 718-555-6666
Send Text Messages to: Primary Phone Number

### Edit Contact Information

Click on the ‘Edit or Enroll’ button to see and request changes to the contact information for your client’s application or case, such as:

- Mailing Address
- Language for Notices
- Email Address
- Primary Phone Number

### Edit Contact Information

More Info ?

Stay informed! You can receive EMAILS about your application and upcoming due dates by entering an email address.

Language for Notices: English

Email Address on file: dktest@mailinator.com

Confirm Email Address: dktest@mailinator.com

Send email notifications: (•) Yes ( ) No

PRIMARY Phone Number & Extension: +1 212-555-1111 ext. Type Home ?

ALTERNATE Phone Number & Extension: +1 212-555-2222 ext. Type Cell

If you would like to receive TEXT MESSAGES, please select the phone number you would like to use. Text message and data rates may apply.

TEXT MESSAGE Phone Number: Alternate phone number

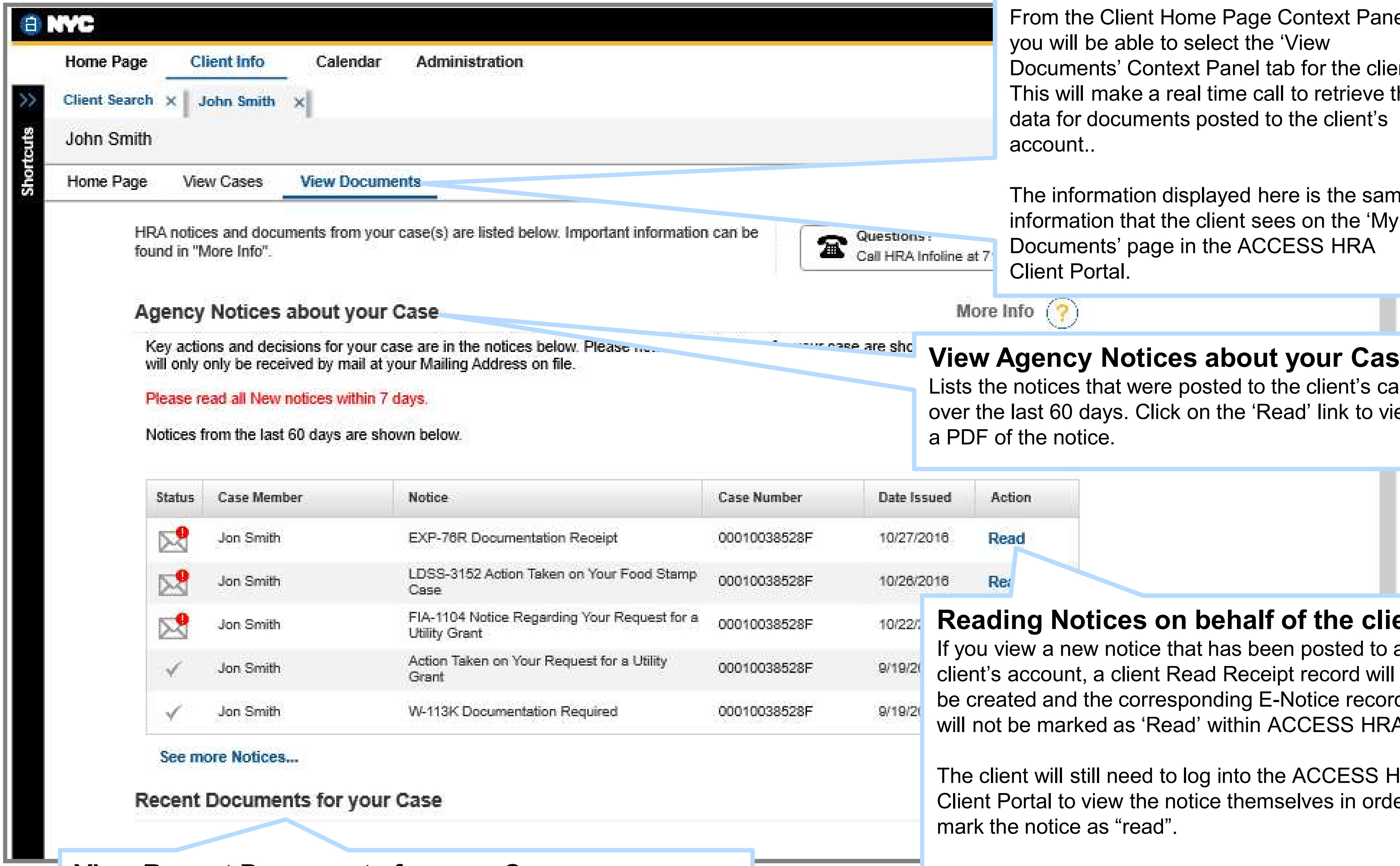
### Current Mailing Address

We have the following mailing address on file for your current case:

4 METROTECH CENTER 19A
BROOKLYN, NY 11201

☑ Check here if your mailing address has changed.

# Client Home Page – View Documents




**View Documents**
From the Client Home Page Context Panel, you will be able to select the 'View Documents' Context Panel tab for the client. This will make a real time call to retrieve the data for documents posted to the client's account..

The information displayed here is the same information that the client sees on the 'My Documents' page in the ACCESS HRA Client Portal.

**View Agency Notices about your Case**
Lists the notices that were posted to the client's case over the last 60 days. Click on the 'Read' link to view a PDF of the notice.

**Reading Notices on behalf of the client**
If you view a new notice that has been posted to a client's account, a client Read Receipt record will not be created and the corresponding E-Notice record will not be marked as 'Read' within ACCESS HRA.

The client will still need to log into the ACCESS HRA Client Portal to view the notice themselves in order to mark the notice as "read".

Notices are displayed on the 'My Documents' page regardless of your client's paperless status.

**View Recent Documents for your Case**
Lists the documents that the client recently submitted to HRA that were received. Documents from within the last 60 days will appear here within their account. This includes documents that the client has:

- Uploaded through the HRA Document Upload Mobile app
- Dropped off at an HRA center
- Sent to HRA via mail or fax

# Calendar – Calendar View

## Calendar Views

On this page, you can view upcoming appointments in a ‘Day’ view, ‘Week’ view, and ‘Month’ view.

Once you select the type of view you would like to see, click the “Go to Selected Date” link.

## Appointment Details

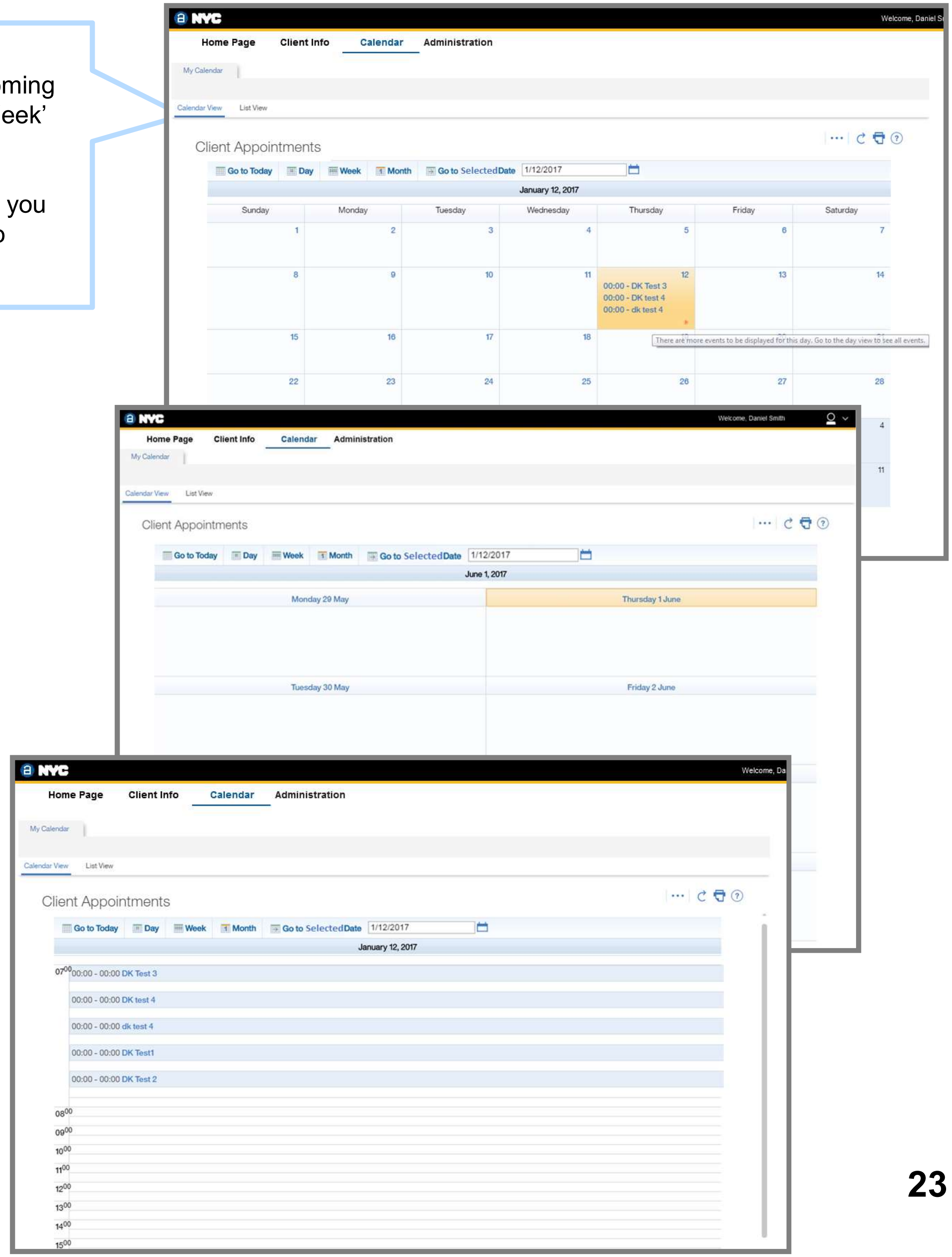
You can view more details about a specific appointment by clicking on a client appointment hyperlink in one of the ‘Calendar - Calendar View’ pages.

This page can also be accessed from the user workspace if you click on an individual appointment in the ‘Upcoming Appointments’ pod.

**Appointment Details**

| | |
|---|---|
| **Client:** | John Smith |
| **Case #:** | Food Stamps (SNAP) - 00975768576B |
| **Appointment Type:** | Eligibility appointment - Review new employment data |
| **Location:** | 4 METROTECH CENTER 19 FL, BROOKLYN NY, 11201 |
| **Date:** | 2/10/2017 |
| **Time:** | 8:00 AM - 9:00 AM |

Close



ACCESS HRA YOUR WAY

# Entering Site ID

## Entering Site ID

The process followed to enter a Site ID on a partner's computer prior to clients submitting an application has not changed.

**Step 1**: Open your browser and enter "nyc.gov/accesshra/" in the address bar
**Step 2**: Once ACCESS NYC loads enter "nyc.gov/accesshra/partners" in the address bar
**Step 3**: Enter your Site ID into the "Site ID" empty field and click the "Set Site ID" button

The Site ID will then be displayed on the ACCESS HRA Client Portal landing page. This will allow HRA to identify applications and recertifications submitted from your organization.