DCF
Provider Portal
User Guide

Kansas
Department for Children and Families

Table of Contents

Introduction

Welcome to the DCF Provider Portal. On this secure site, Employment Services providers can:

- View client referrals
- Accept or reject a client referral
- Submit client attendance
- Upload documents

The Provider Portal can be accessed at www.dcfprovider.kees.ks.gov.

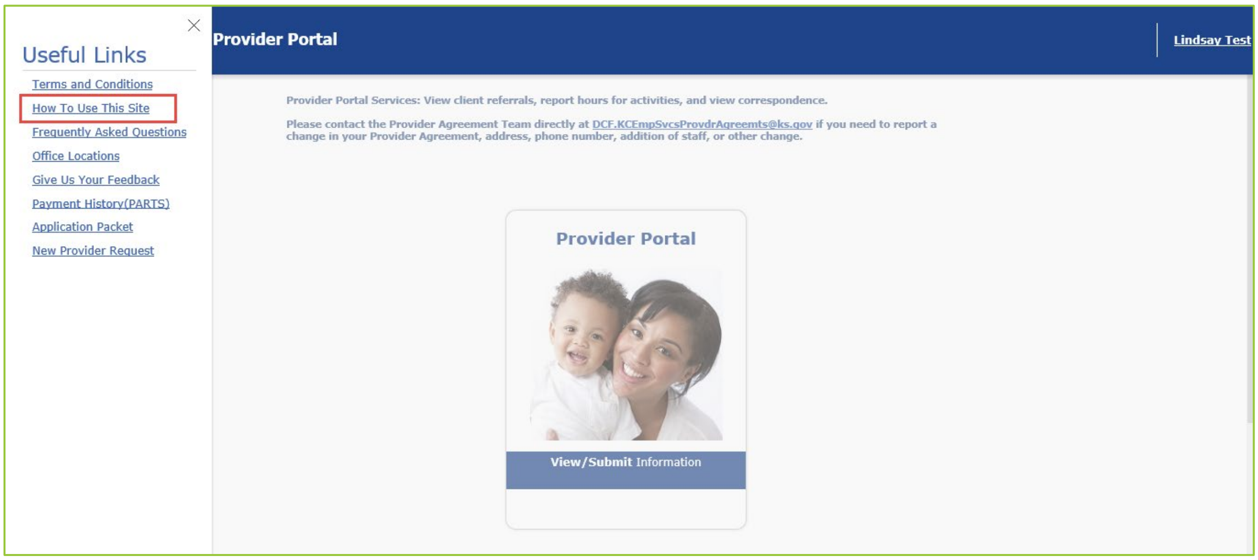
You can also navigate to the Provider Portal through the DCF Self-Service Portal (SSP). The DCF SSP can be accessed at www.dcfapp.kees.ks.gov. Once you are on the DCF SSP home screen, click on the hamburger menu in the upper left corner. Then click the Go to Provider Portal hyperlink.

It is recommended that providers use one of the internet browsers listed below when accessing the portal. Other browsers may cause issues with the screen display. A pop-up box will display if you are using an unsupported browser. Supported browsers include:

- Microsoft Internet Explorer 11 (IE11)
- Microsoft Edge (using Windows 10)
- Google Chrome (Latest Version)
- Mozilla Firefox (Latest Version)
- Apple Safari (Latest Version)

Accessing Online Help

Online help is available to assist you in navigating throughout the Provider Portal. To access demos and/or the Provider Portal user guide, click on the hamburger menu in the upper left corner from any screen within the portal and select *How to Use This Site*. You do not have to be logged in to the portal to utilize this feature.



Links to Information

The **Hamburger** menu ☰ on the Provider Portal home screen displays links to a variety of information topics when clicked.

Information hyperlinks include:

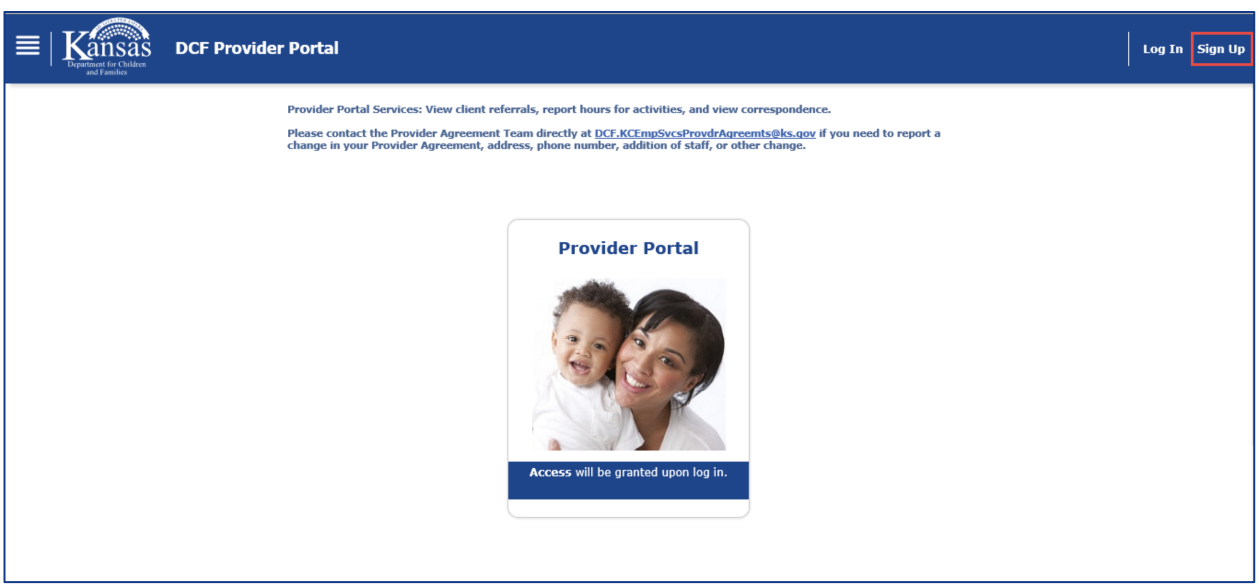
1. **Terms and Conditions:** Click for Terms and Conditions
2. **How to Use This Site:** Click for how to use this DCF Provider Portal
3. **Frequently Asked Questions:** Click for answers to common questions
4. **Office Locations:** Click to find a DCF office near you
5. **Gives Us Your Feedback**: Click to share about your experience in a short survey
6. **Payment History (PARTS):** Click to navigate to the PARTS website to view your payment history.
7. **Application Packet:** Click to navigate to the DCF website to learn more about partnering with DCF to become an approved provider
8. **New Provider Request:** Click to complete information to inquire about becoming an Employment Services Provider. DCF will contact you.

Signing Up

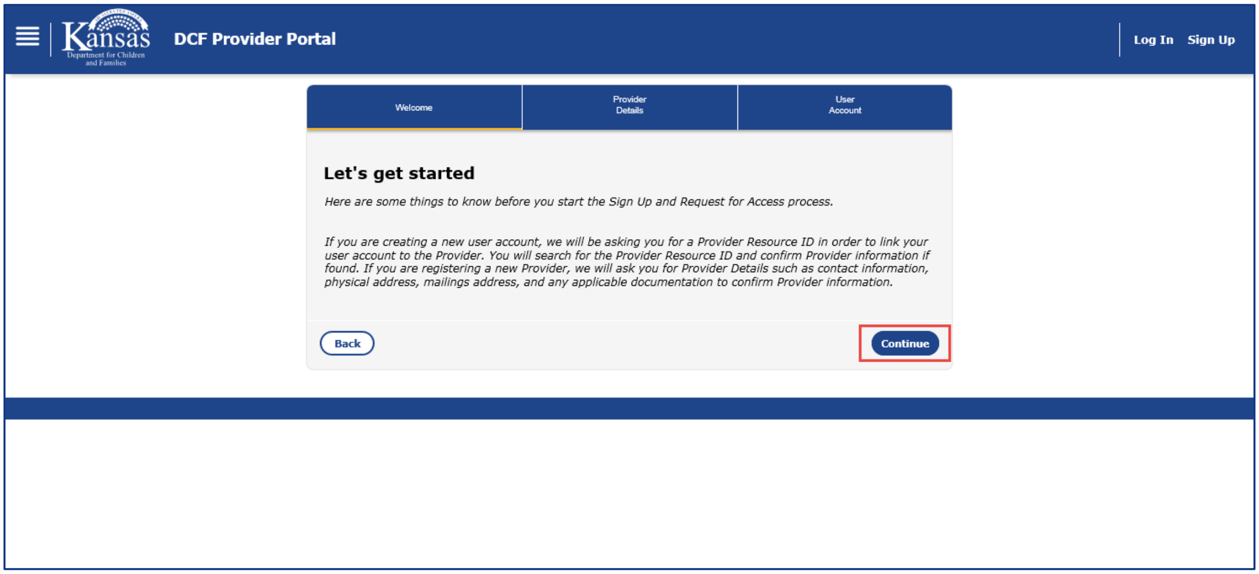
To use the DCF Provider Portal, you will need to sign up. Each user of the portal needs to create a secure username and password. ***Note****: Fill in all required content that has an (*).*

Directions: Follow the steps below.

1. **Sign Up** – Click at the top right corner of the portal to sign up.



2. Read the **Let's get started** screen. Click the **Continue** button.



3. Complete a **User Online Account Credentials** screen.

   a. **Username** – Create a username. You will use the same username each time you log in to the Provider Portal.

   b. **Password** – The password must be at least eight characters in length and cannot contain the username. The password must contain three of the following four:

      - Uppercase
      - Lowercase
      - Numeral
      - Special Characters: <>, #, |, &, ~, ?, (), {}, %, or *

   c. **Confirm Password –** Enter your password a second time to confirm the same spelling. ***Note:*** *The password expires every 60 days.*

   d. **First Name -** Enter your first name.

   e. **Middle Name/Initial -** Entering a middle name is optional

   f. **Last Name -** Enter your last name.

   g. **Suffix -** If applicable, enter your suffix.

   h. **Date of Birth -** Enter your date of birth.

   i. **Contact Information**

      - **Phone Number -** Enter the phone number used to reach you at your organization. Be sure to enter an extension if you have one. You may enter more than one phone number if needed.
      - **Email Address -** Enter the email address used to reach you at your organization.

   j. **Security Question Instructions -** Follow instructions to create security questions in case you forget your password.

   - **First Security Question -** Select the drop-down menu and select a security question.

   Answer - *Enter the answer to your security question.*

   - **Second Security Question -** Select the drop-down menu and select a security question.

   Answer - *Enter the answer to your security question.*

   k. Click the **Save and Continue** button to continue the sign-up process or click the **Cancel** button to quit the sign-up process.

Welcome | Provider Details | User Account

User Online Account Credentials

To Sign Up as a New User and request access to the services on the Provider Portal, fill in the information below.

The User Name cannot contain special characters, such as, <>, #, |, &, ~, ?, (), {}, %, or *.
The password must be at least eight characters and contain at least three of the following four characteristics:
Upper Case, Lower Case, Numerals or Special characters.
The password cannot contain User Name.
You will automatically be logged in upon successful sign up.

* Red asterisk indicates required

User Name* MickeyMouse

Password* ••••••••••

Confirm Password* ••••••••••

First Name* Mickey

Middle Name/Initial

Last Name* Mouse

Suffix Select One

Date of Birth (mm/dd/yyyy)* ******1982

Contact Information

Phone Information

Type* Cell

Phone Number (999)999-9999*

Extension

Do you have additional phone numbers? Yes No

Email Address (example@abc.com)*

Select Security questions for which you know the answer. If you forget your password, you will be asked to answer these questions to recover your password.

First Security Question* What was the name of your first school?

Answer* Peterson

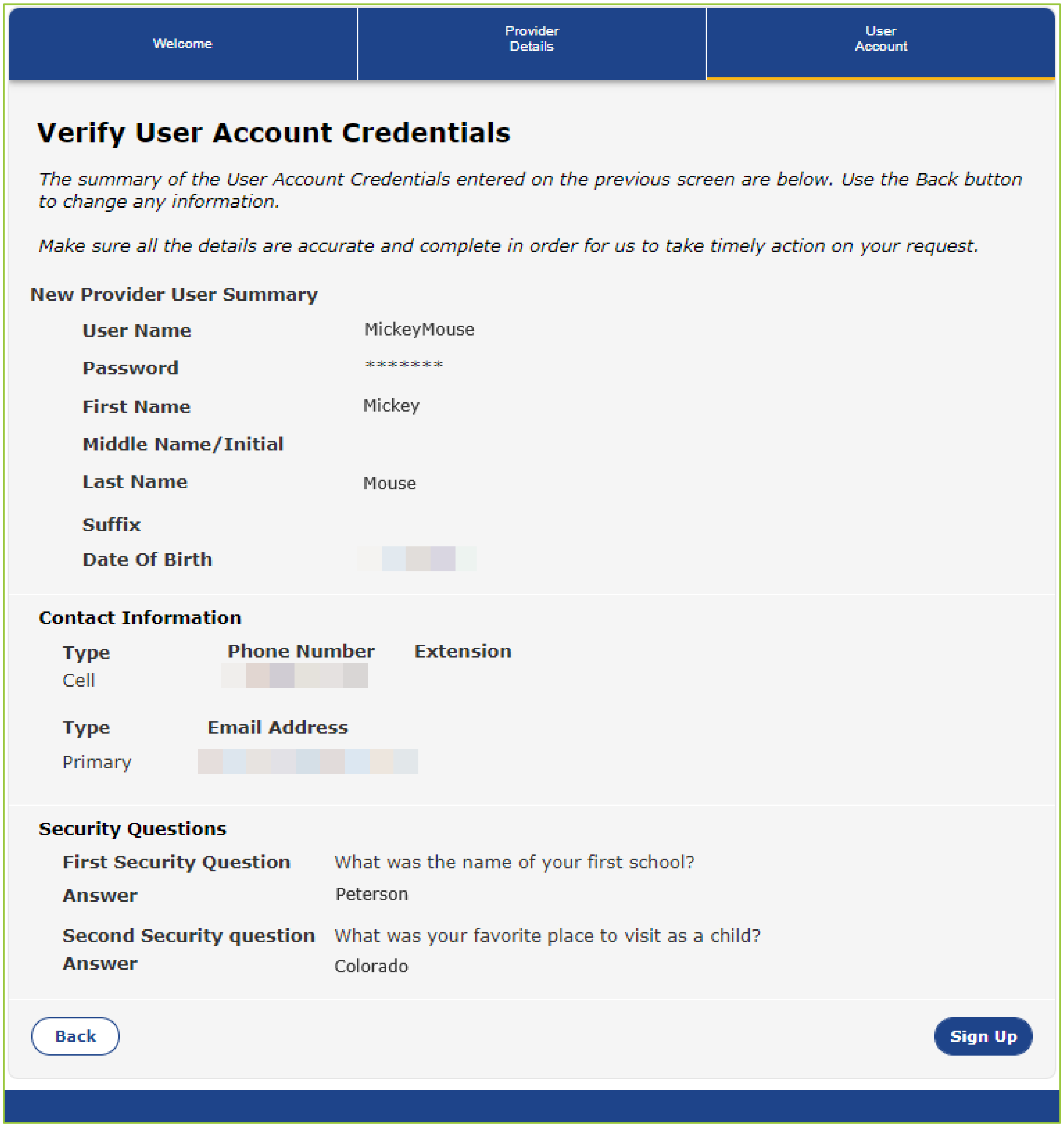
Second Security question* What was your favorite place to visit as a ch

Answer* Colorado

Cancel | Save and Continue

4. The **Verify User Account Credentials** screen displays a summary of the user account credentials you entered. Review the information.

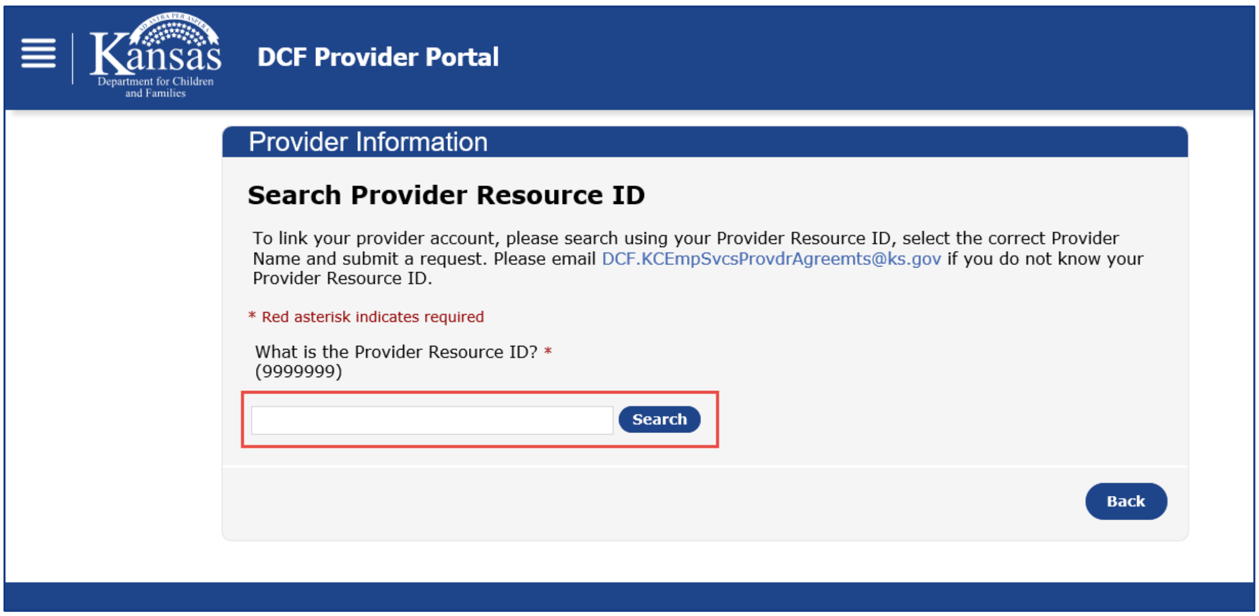
   - Click the **Back** button to return to the previous screen and update your information.
   - Click the **Sign Up** button to activate your user account.



5. Link your account

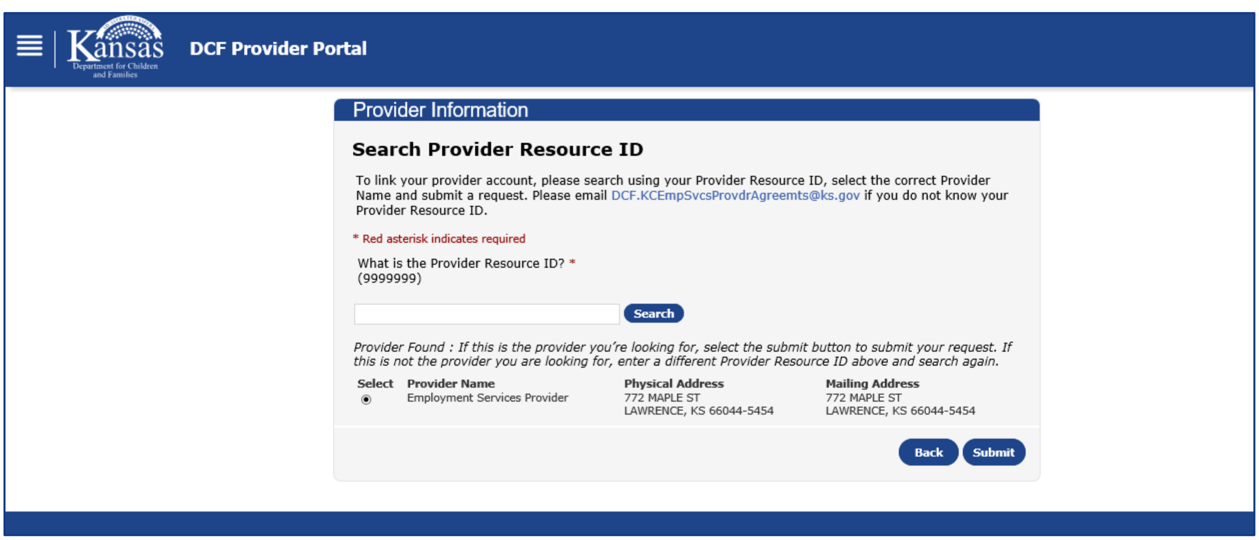
After creating an account, you will need to request to have your account linked to your *Provider Resource ID* by completing the **Search Provider Resource ID** screen. A *Provider Resource ID* is given to you by DCF. *Please email DCF.KCEmpSvcsProvdrAgreemts@ks.gov if you do not know your Provider Resource ID.*

a) **What is the Provider Resource ID?** - Enter your 7-digit *Provider Resource ID* and click the **Search** button or click the **Back** button to exit the linking process. You can link your account later from your home screen.

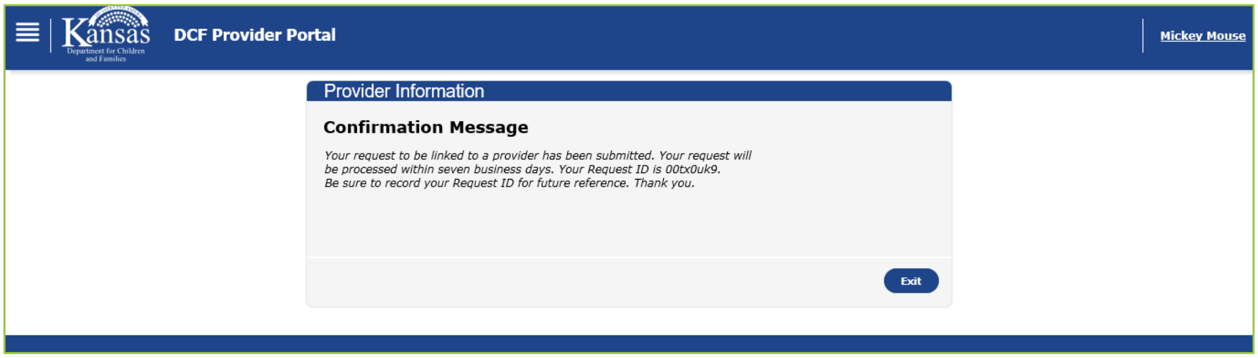


b) **Submit Your Request** - Select your *organization* and click the **Submit** button. If you do not see your organization's information, re-enter your *Provider Resource ID* to search again or email DCF.KCEmpSvcsProvdrAgreemts@ks.gov to make sure you have the correct Provider Resource ID.

You can also click the **Back** button to exit the linking process. You can link your account later from your home screen.



c) You will receive a **Confirmation Message** indicating that the request was submitted. After your request for account linking has been submitted, DCF will be notified. The agency will review your information and link your account. The confirmation message includes a Request ID that you can save in case you need to refer to it later. Click the **Exit** button to return to your home screen.



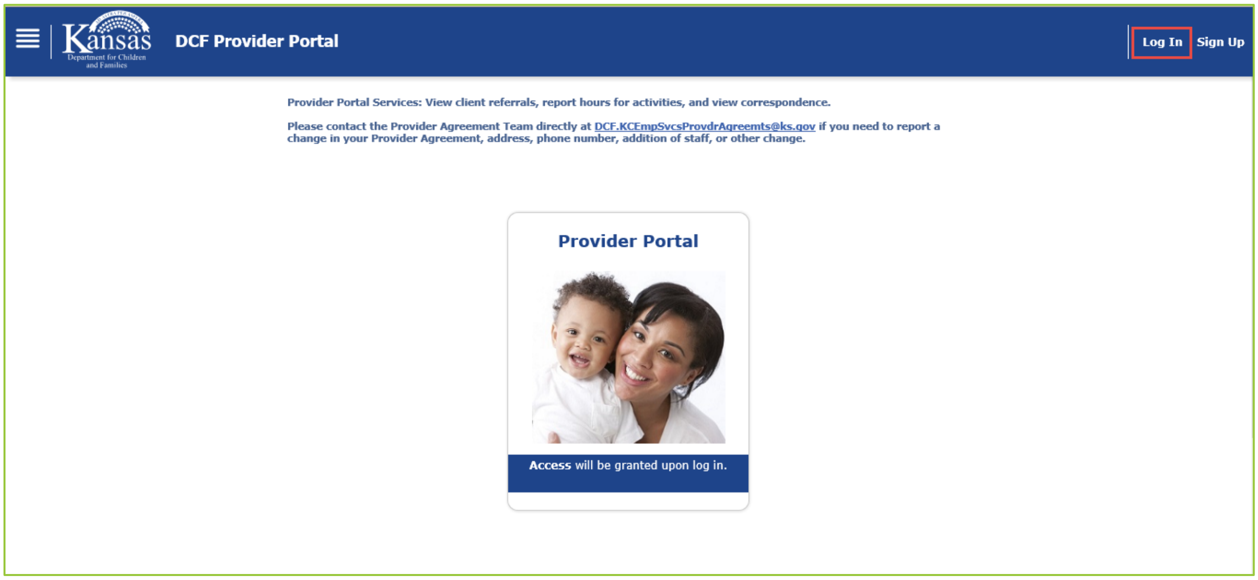
When your request for access is pending, the home screen displays the following message: Your request for access to the services on this site is in process. Requests currently under review.

After your online account has been linked, you will see additional options available to you on your home screen under **View/Submit Information**. You can access all of these features after you have logged in to your secure account. Additional features include:

- View Provider Information
- Submit Client Attendance Information
- Upload a Document
- View Client Referrals

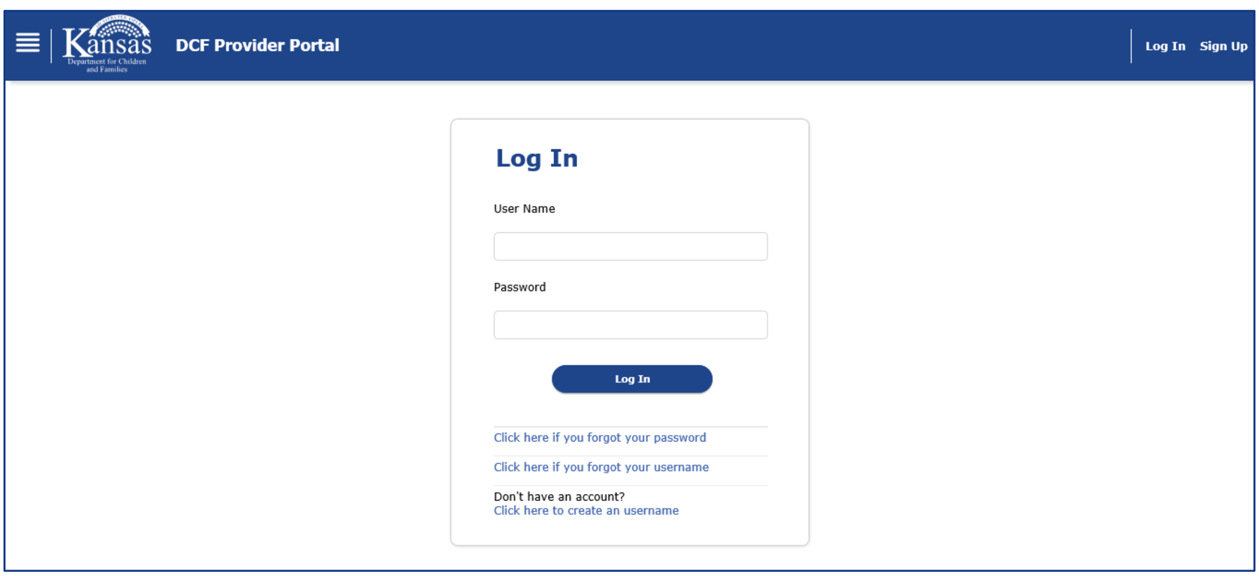
Logging in to the Provider Portal

After you have successfully signed up, click the **Log In** hyperlink in the upper right corner of the Provider Portal home screen to log in to your account.



The **Log In** screen appears. To log in to your account:

1. Enter your unique username and password.
2. Click the **Login** button.



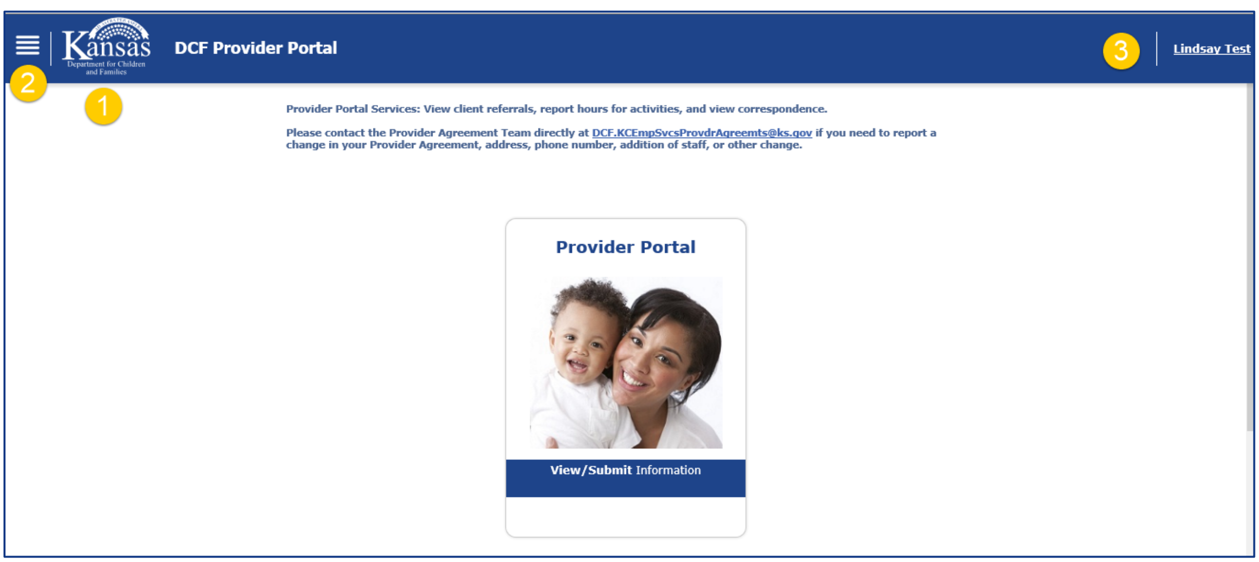
The home screen displays after login. The home screen includes a Global Navigation Bar at the top of the screen. The Global Navigation Bar is available on every screen of the Provider Portal, and includes the following:

1) **Kansas Home** icon: Click to return to the home screen.

2) **Hamburger** menu: Displays links to a variety of information topics. Click on any of the information hyperlinks to obtain more information about a topic. Information hyperlinks include:

   - **Terms and Conditions:** Click for Terms and Conditions
   - **How to Use This Site:** Click for how to use this DCF Provider Portal
   - **Frequently Asked Questions:** Click for answers to common questions
   - **Office Locations:** Click to find a DCF office near you
   - **Gives Us Your Feedback**: Click to share about your experience in a short survey
   - **Payment History (PARTS):** Click to navigate to the PARTS website to view your payment history.
   - **Application Packet:** Click to navigate to the DCF website to learn more about partnering with DCF to become an approved provider
   - **New Provider Request:** Click to complete information to inquire about becoming an Employment Services Provider. DCF will contact you.

3) **Username** link: Once logged in, your username displays on the Global Navigation Bar. Clicking your username allows you to click on the *My Account* link or *Log Out* of the Provider Portal. Clicking the *My Account* link allows you to view or update your personal information as well as update your password and/or security questions.

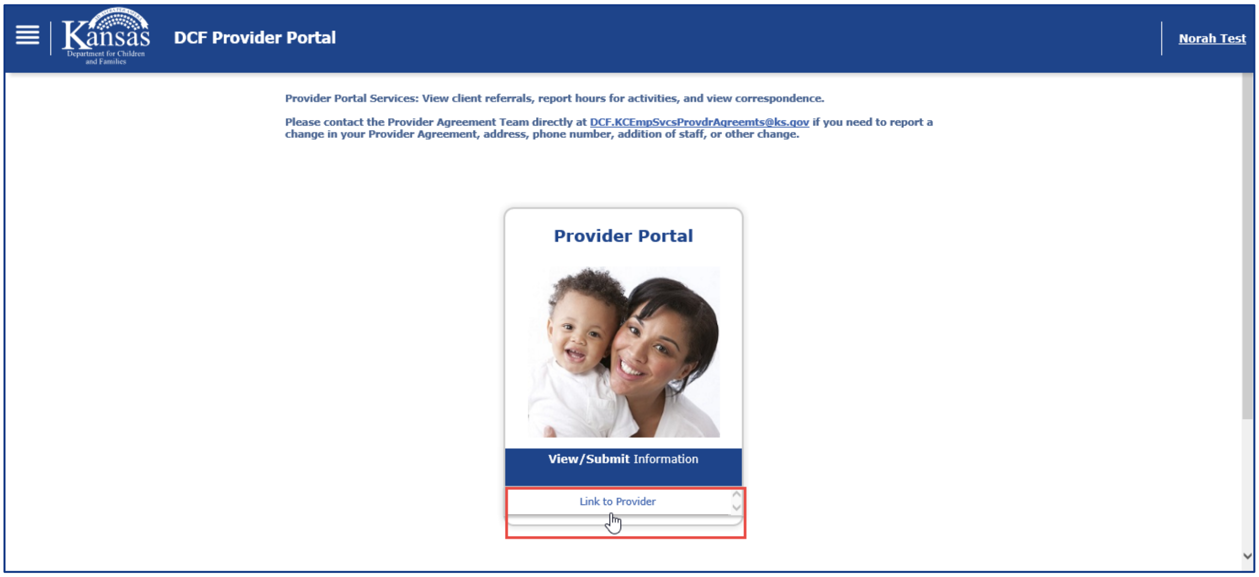


Linking Your Account After Account Set-Up

In order to use the Provider Portal, you will need to request to have your account linked to your *Provider Resource ID*. A Resource ID is given to you by DCF. *Please email DCF.KCEmpSvcsProvdrAgreemts@ks.gov if you do not know your Provider Resource ID.*

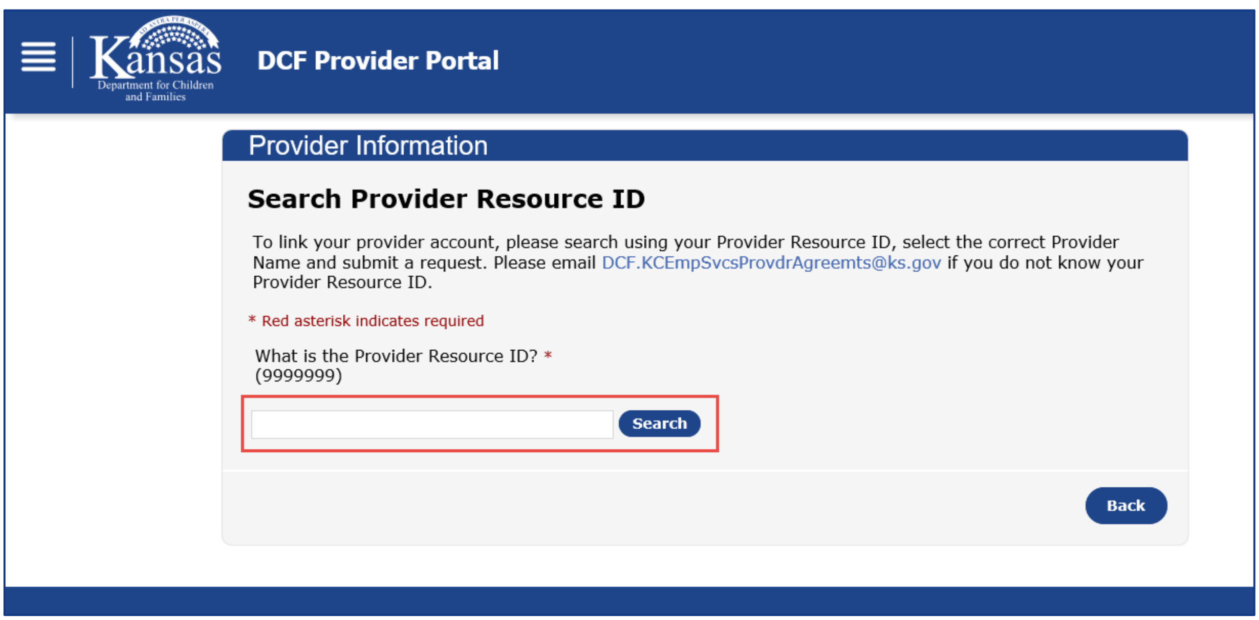
If you did not request to link your account during the account set up process, follow the steps below.

1. Log in to the Provider Portal.
2. Click the **Link to Provider** hyperlink. This link is found under the *Provider Portal View/Submit Information* text on the home screen.



3. Complete the Search Provider Resource ID

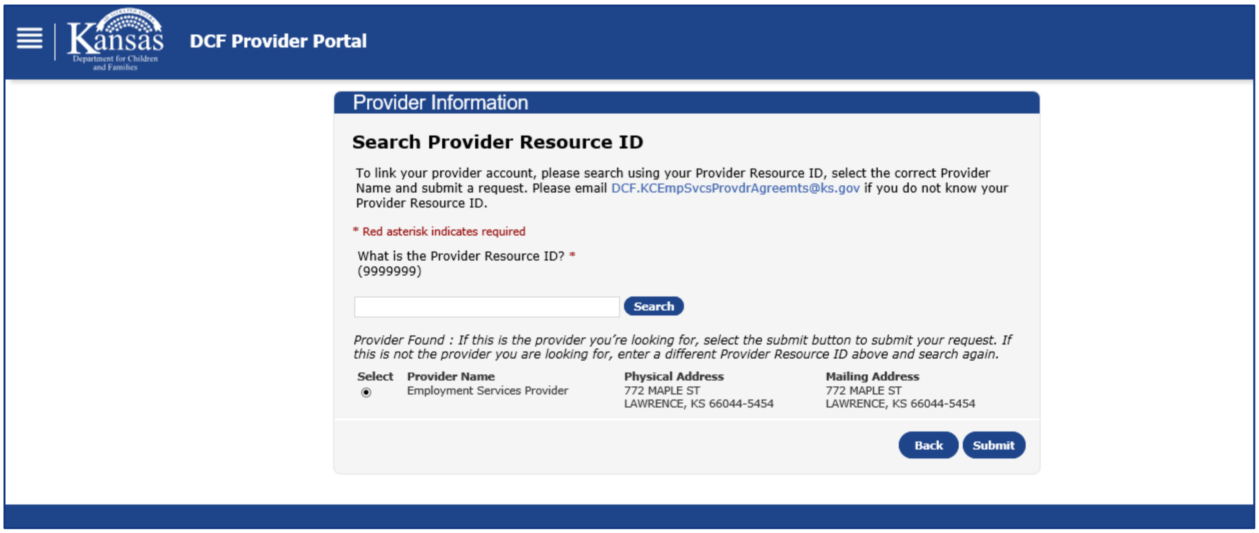
   a) **What is the Provider Resource ID?** - Enter your 7-digit *Provider Resource ID* and click the **Search** button. Or, click the **Back** button to exit the linking process. You can link your account later from your home screen.



4. Submit Your Request

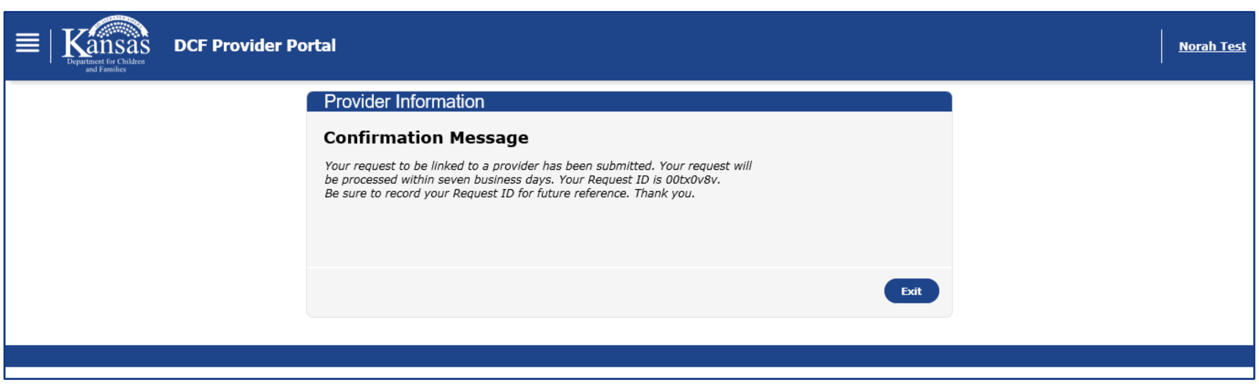
Select your *organization* and click the **Submit** button. If you do not see your organization's information, re-enter your *Provider Resource ID* to search again or email DCF.KCEmpSvcsProvdrAgreemts@ks.gov to make sure you have the correct Provider Resource ID.

You can also click the **Back** button to exit the linking process. You can link your account later from your home screen.



5. You will receive a **Confirmation Message** indicating that the request was submitted. After your request for account linking has been submitted, DCF will be notified. The agency will review your information and link your account. The confirmation message includes a Request ID that you can save in case you need to refer to it later.

Click the **Exit** button to return to your home screen.



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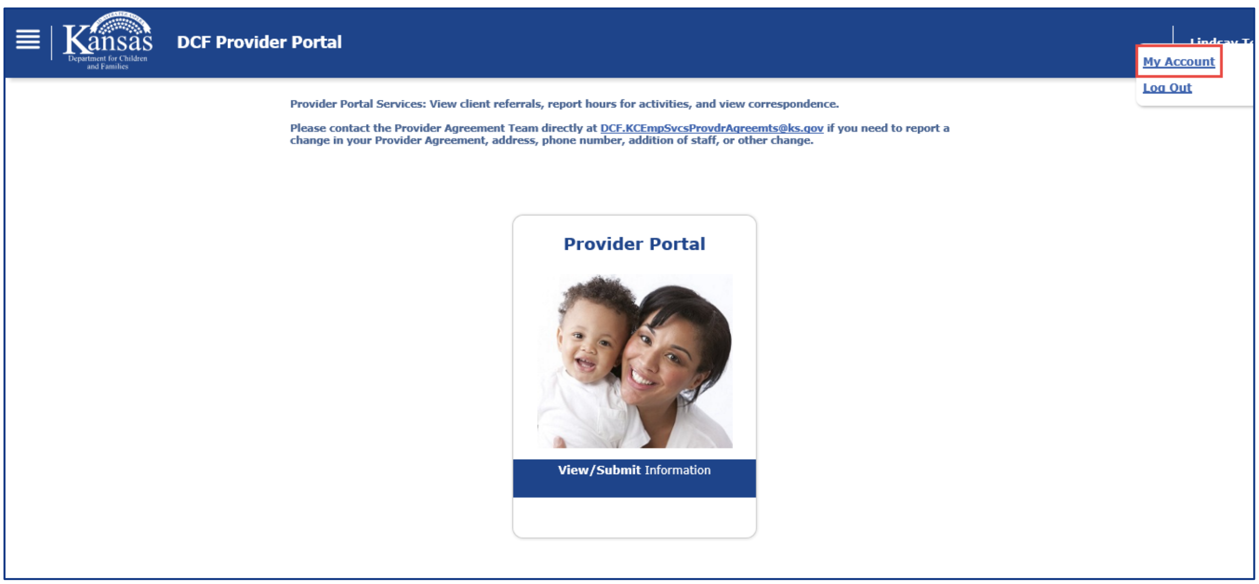
- View Provider Information
- Upload a Document
- Submit Client Attendance Information
- View Client Referrals

Managing Your Account Information

Now that you have signed up, you can log in to the Provider Portal at any time to manage your account. Once logged in, your username displays in the upper right corner of your home screen. Clicking your username allows you to click on the **My Account** hyperlink to update your password or other personal information.



The **My Account** hyperlink has two tabs where you can make or save changes.

- **Update Personal Information** tab – click to update information such associated to your account such as phone number and email information.
- **Password Management tab** – click to update password and security questions. Remember, if you forget your password, the security questions will be used to help you reset it.

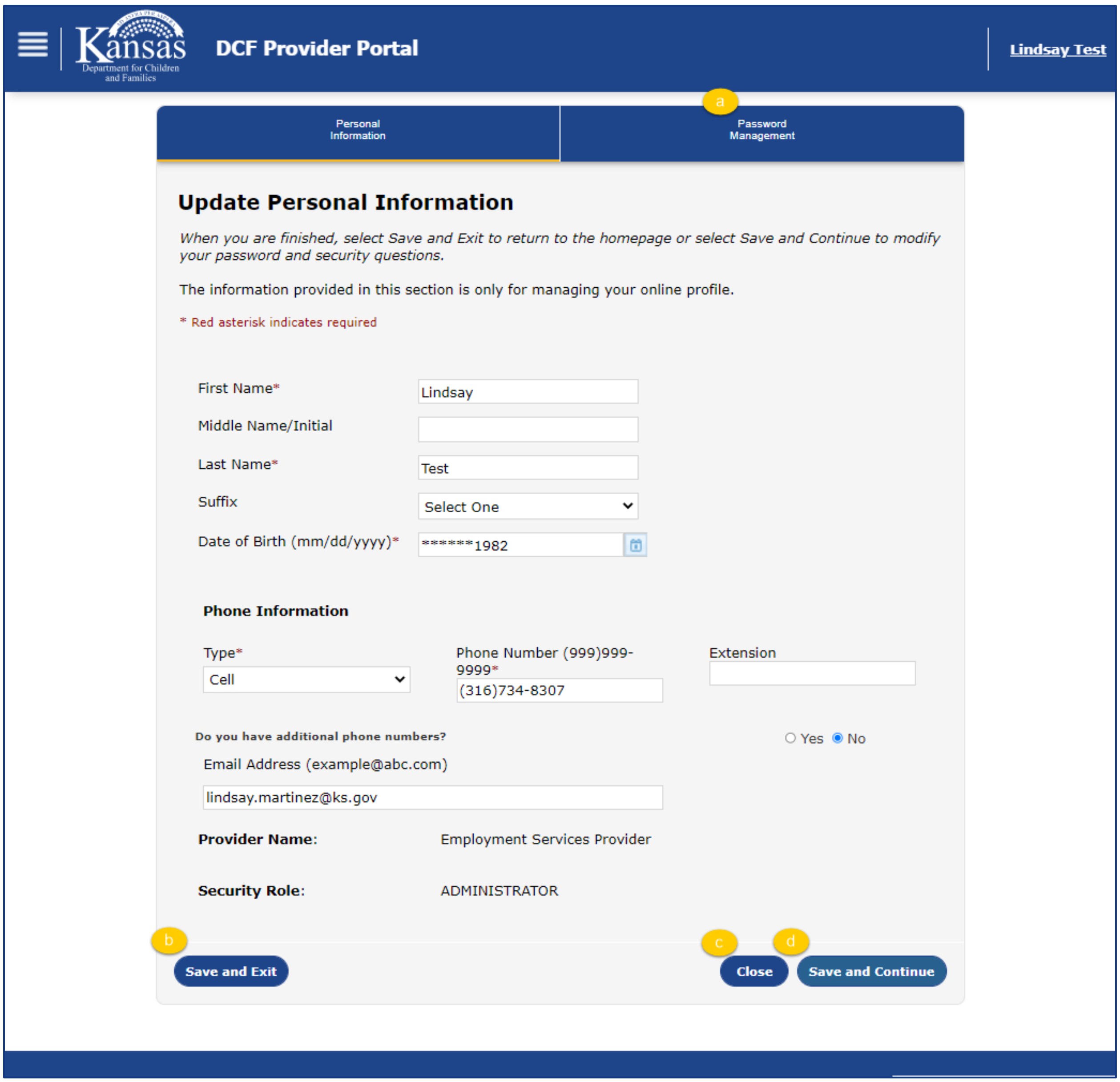
1. After clicking the **My Account** hyperlink, the **Update Personal Information** screen displays.

    a) If you only need to change your password and/or security question, click the **Password Management** tab.

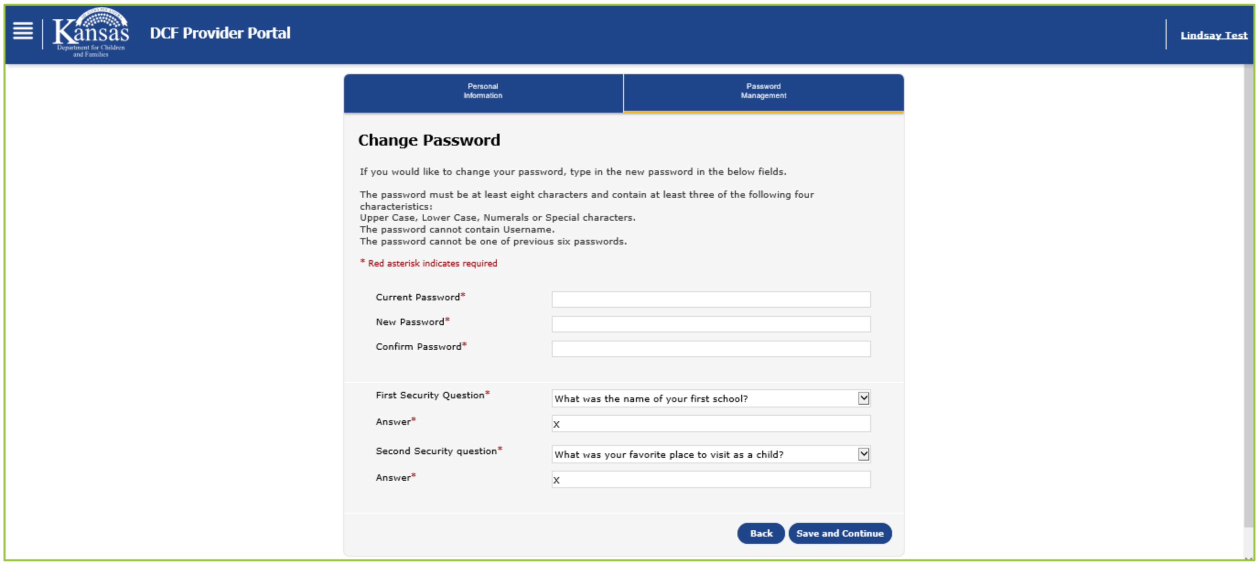
    b) Click the **Save and Exit** button to save your changes and return to the home screen.

    c) Click the **Close** button to return to the home screen without saving any changes.

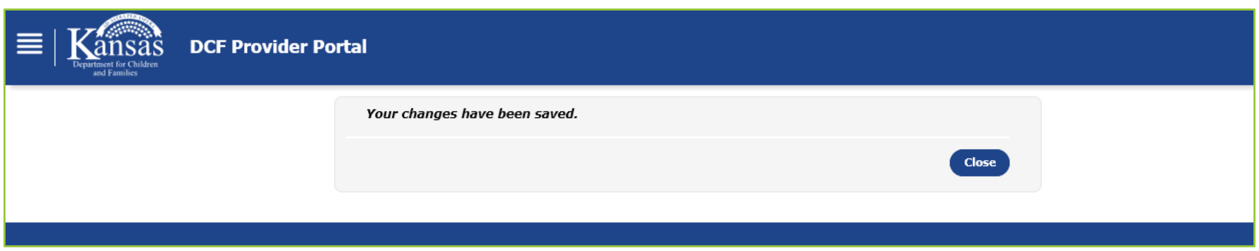
    d) Click the **Save and Continue** button to save your changes and navigate to the **Change Password** screen to update your password and/or security questions.



2. Use the **Change Password** screen to update your password and/or security questions. Click the **Save and Continue** button to save your changes or click the **Back** button to return to the **Update Personal Information** screen without saving your changes.

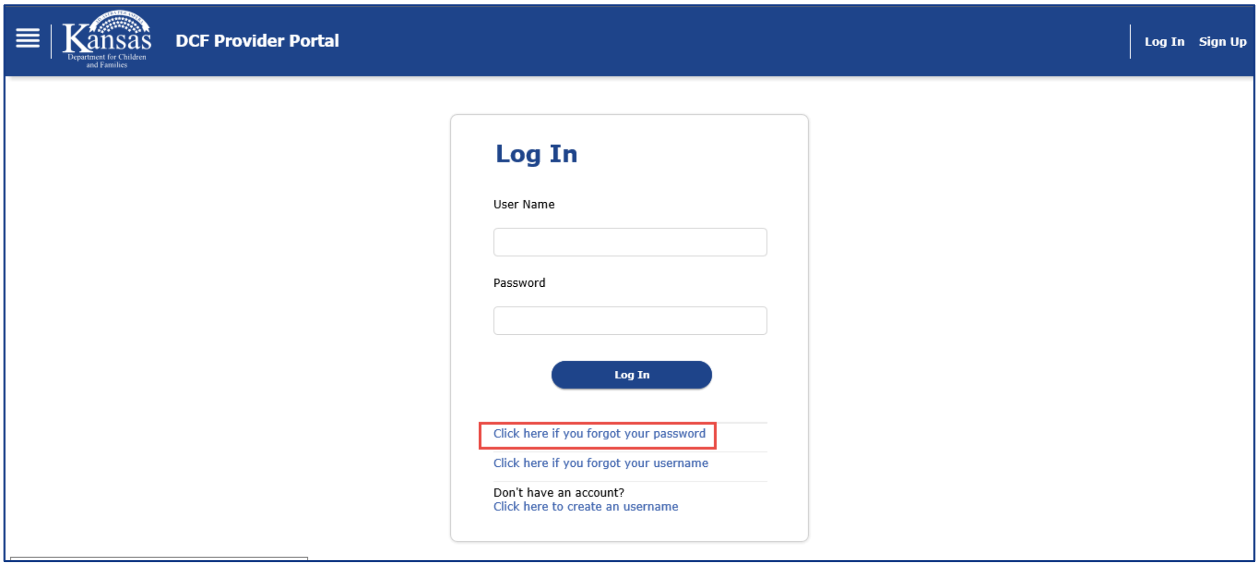


3. The **Confirmation Message** screen displays a message confirming your changes have been saved. Click the **Close** button to return to the home screen.

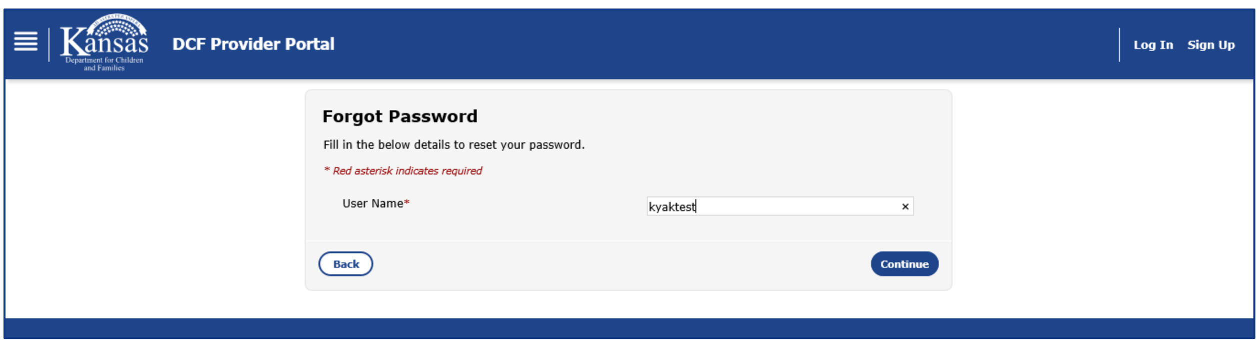


Forgot Password

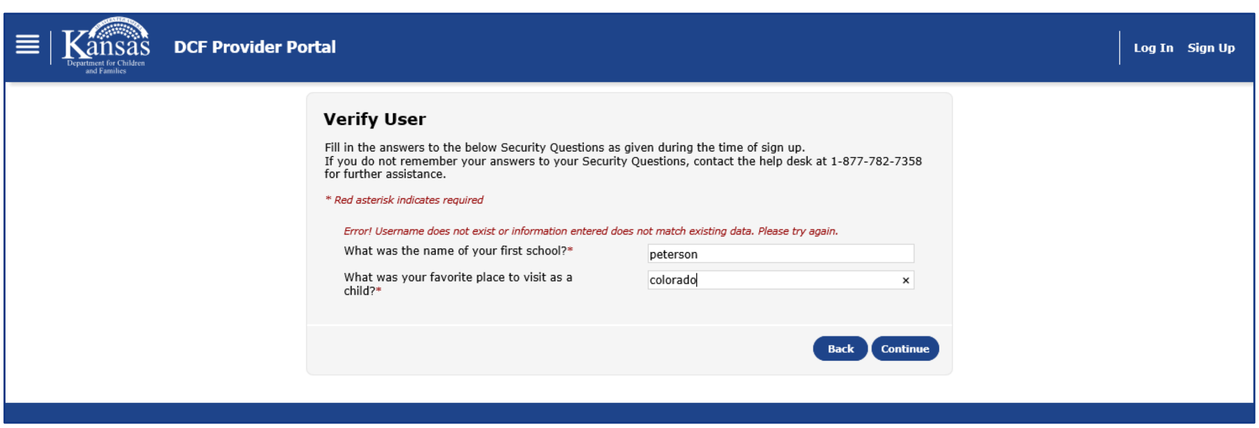
1. On the Provider Portal Login screen, click the *Click here if you forgot your password* hyperlink.



2. The **Forgot Password** screen appears. Enter your **Username** and click the **Continue** button. Or, click the **Back** button to return to the home screen without resetting your password.



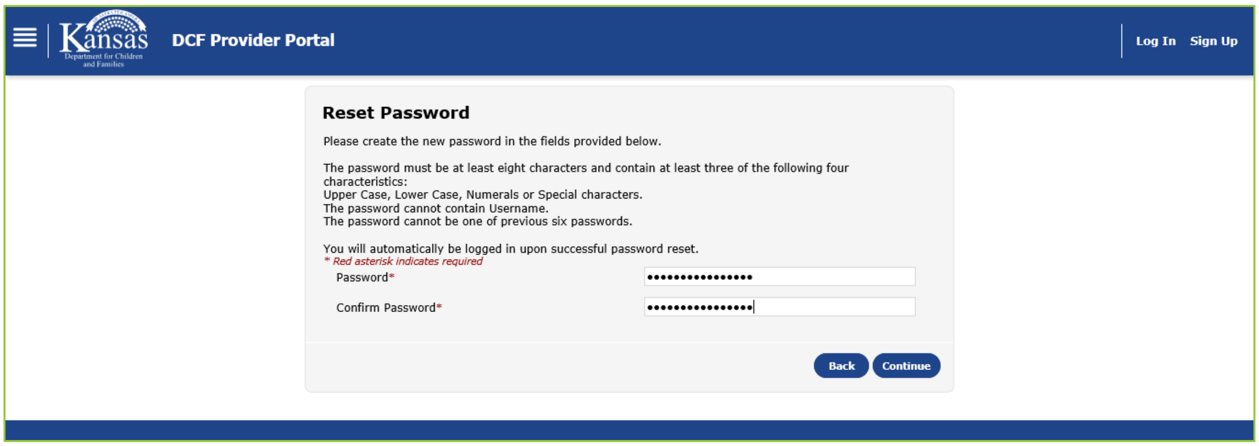
3. The **Verify User** screen prompts you to answer two security questions in order to confirm your identity. The answers are not case sensitive. Click the **Continue** button to create a new password or click the **Back** button to return to the **Forgot Password** screen.



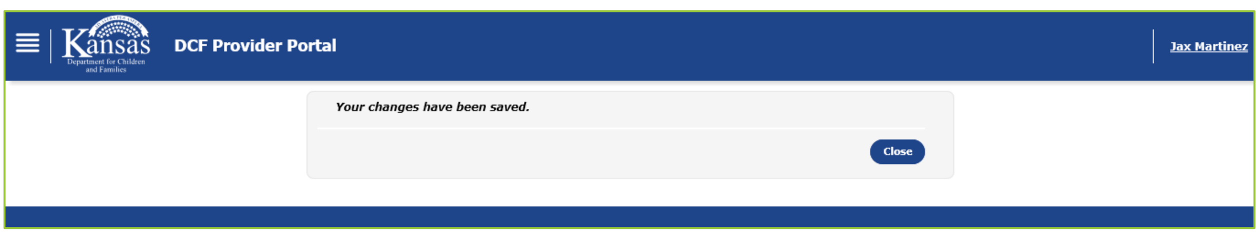
4. Use the **Reset Password** screen to enter a new password. Click the **Continue** button to confirm your new password. Or, click the **Back** button to return to the **Verify User** screen.

The password must be at least eight characters in length and cannot contain the username. The password must contain three of the following four:

- Uppercase
- Lowercase
- Numeral
- Special characters: <>, #, |, &, ~, ?, (), {}, %, or *

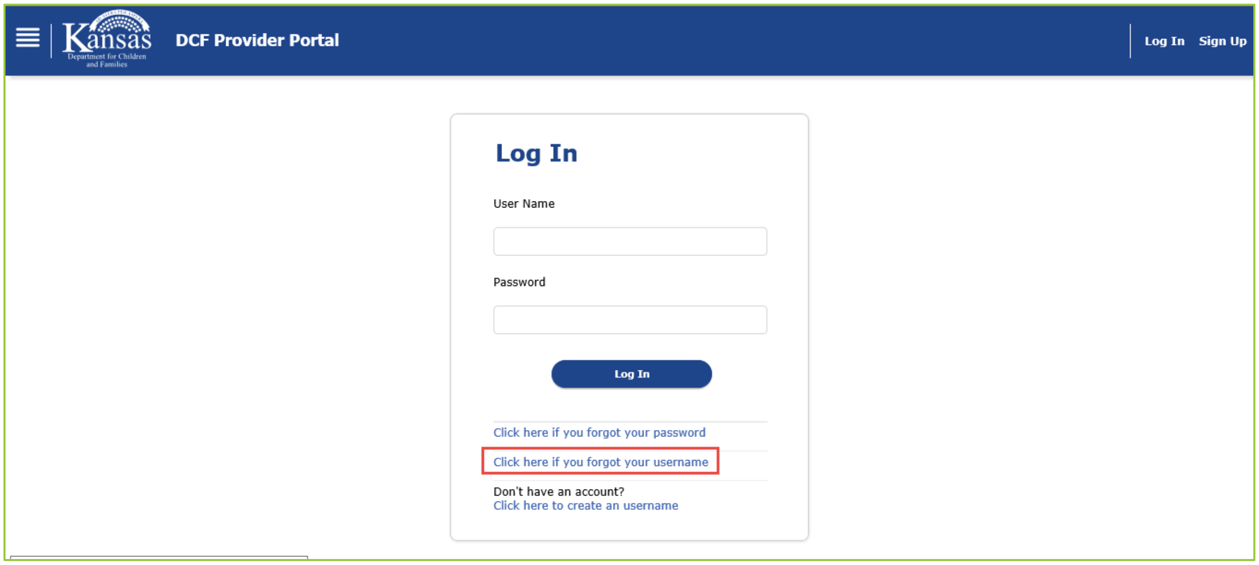


5. The **Confirmation Message** screen displays a message confirming your new password has been saved. Click the **Close** button to return to the home screen.

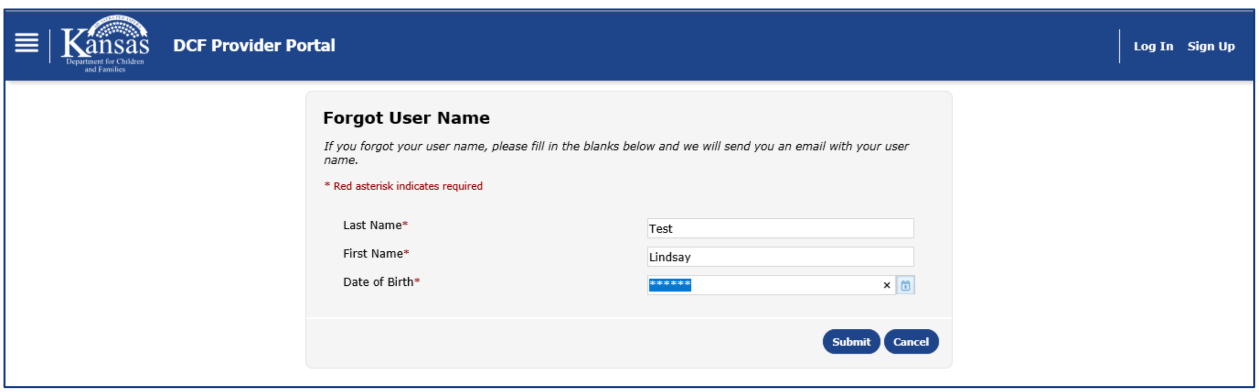


Forgot User Name

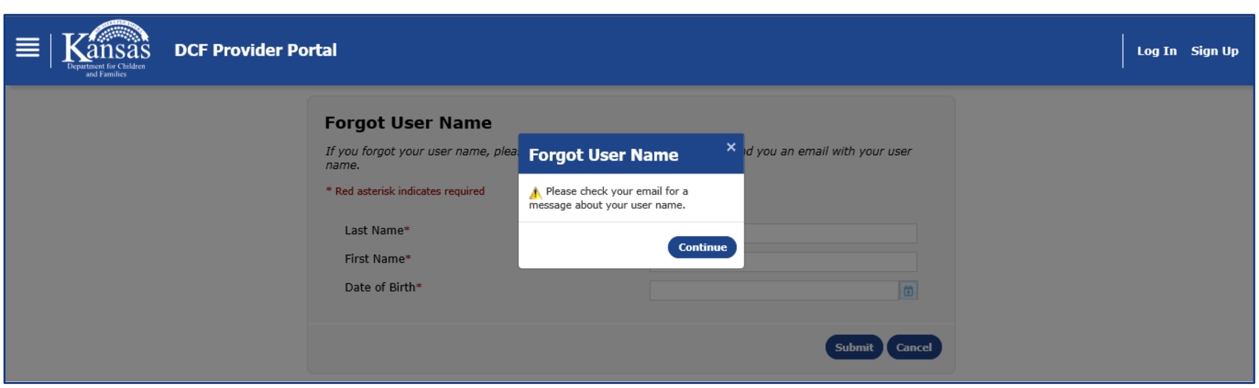
1. If you have forgotten your username, click the *Click here if you forgot your username* hyperlink on the Provider Portal Login screen.



2. The **Forgot User Name** screen appears. To recover your username, complete the details and click the **Submit** button, or to return to the home screen without recovering your username, click the **Cancel** button.

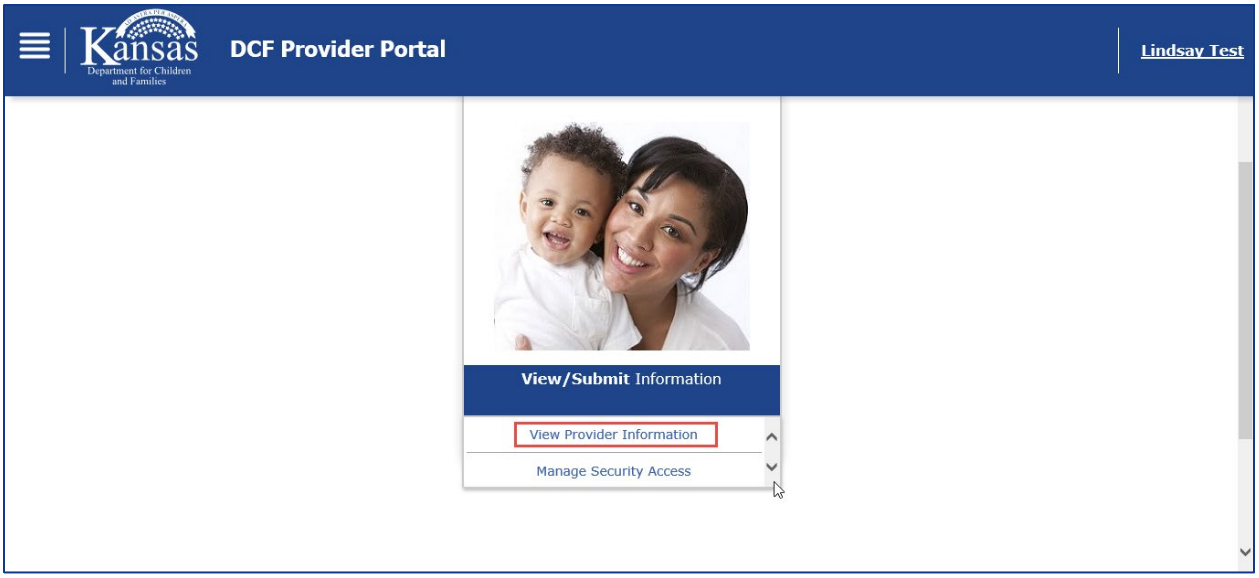


3. Once submitted, an email is sent to you about with your username information. Click the **Continue** button. You are directed back to the home screen.



Viewing Provider Information

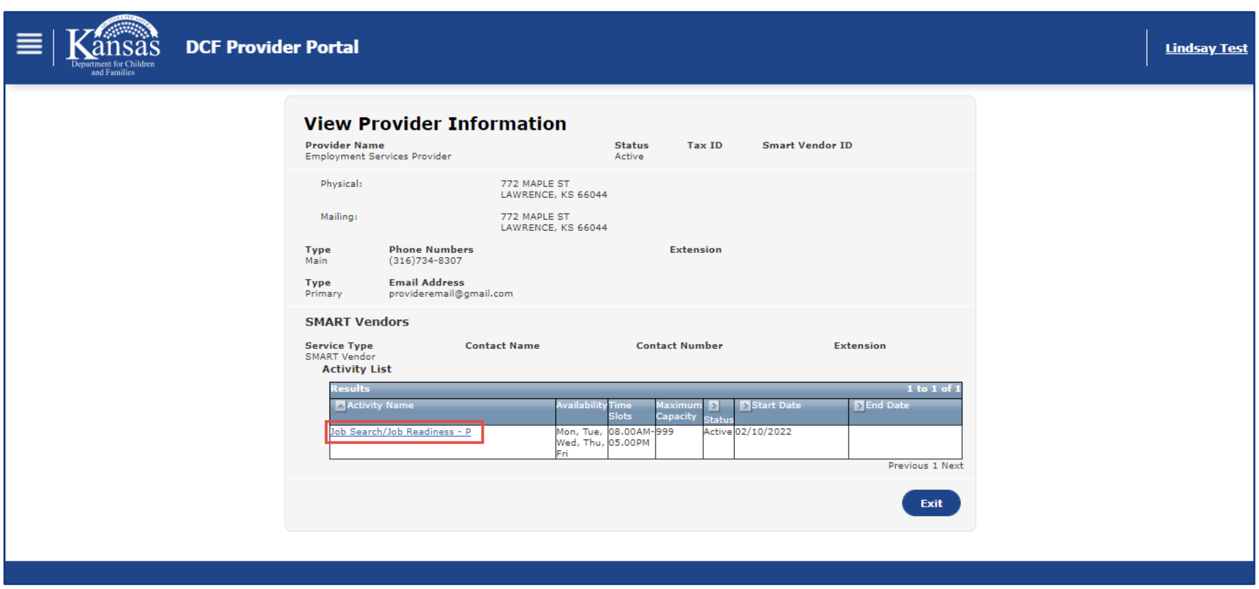
The **View Provider Information** hyperlink can be used to see what information DCF has on file for your organization.

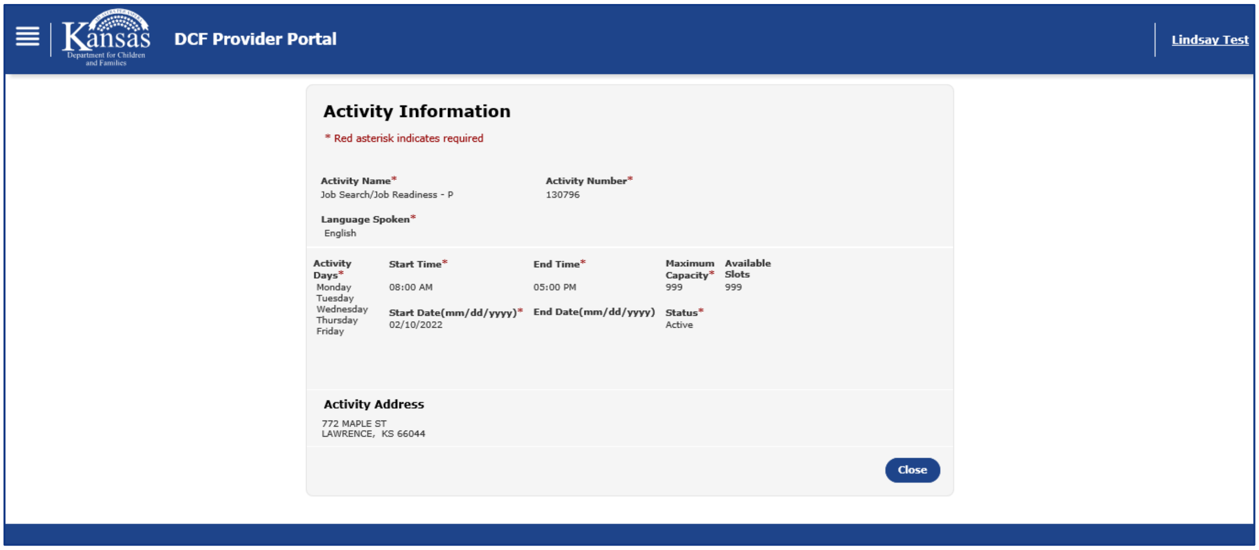


The **View Provider Information** screen displays after clicking the hyperlink from your home screen. This screen displays your *SMART Vendor ID* if you have one, as well as your contact information.

If you have a *SMART Vendor ID*, the information that populates on this screen is taken from the *DA-130: Authorization for Electronic Deposit Supplier Payment form for direct deposit* that you completed to receive payments from DCF. Therefore, the contact information on this screen could be different from what DCF Employment Services actually uses to contact you.

In addition, you'll find a list of services you provide for DCF clients. Click the **Actvity Name** hyperlink under the *Activity List* block to see more specifc information about a certain service you provide.



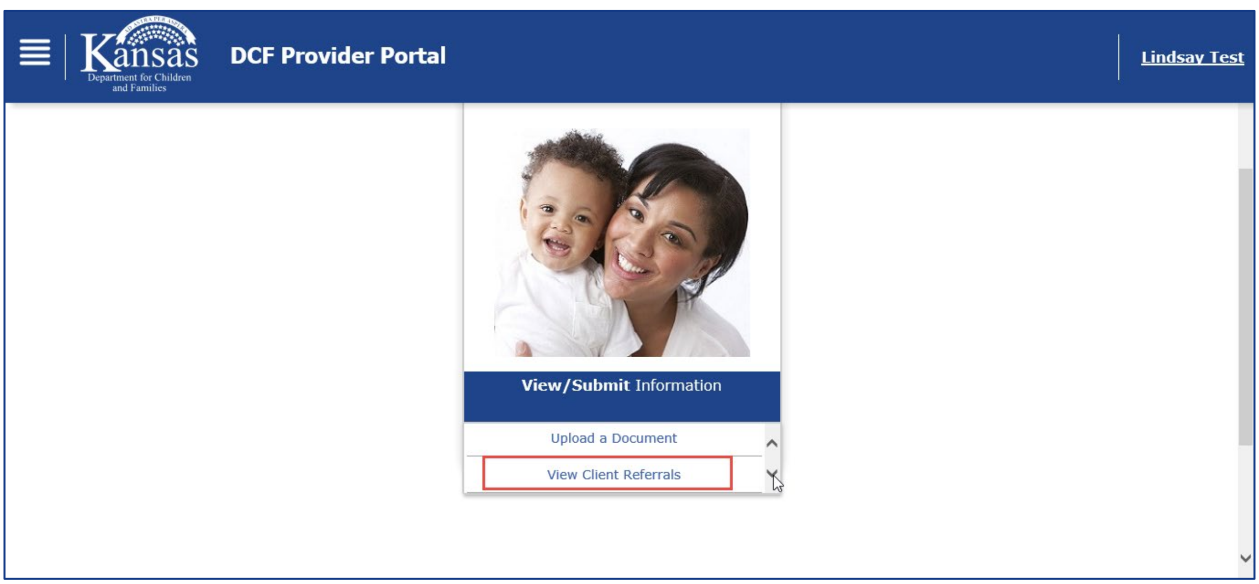


Accessing Client Referrals

When logged in to your account, the Provider Portal enables you to search for and view existing client referral information received from DCF.

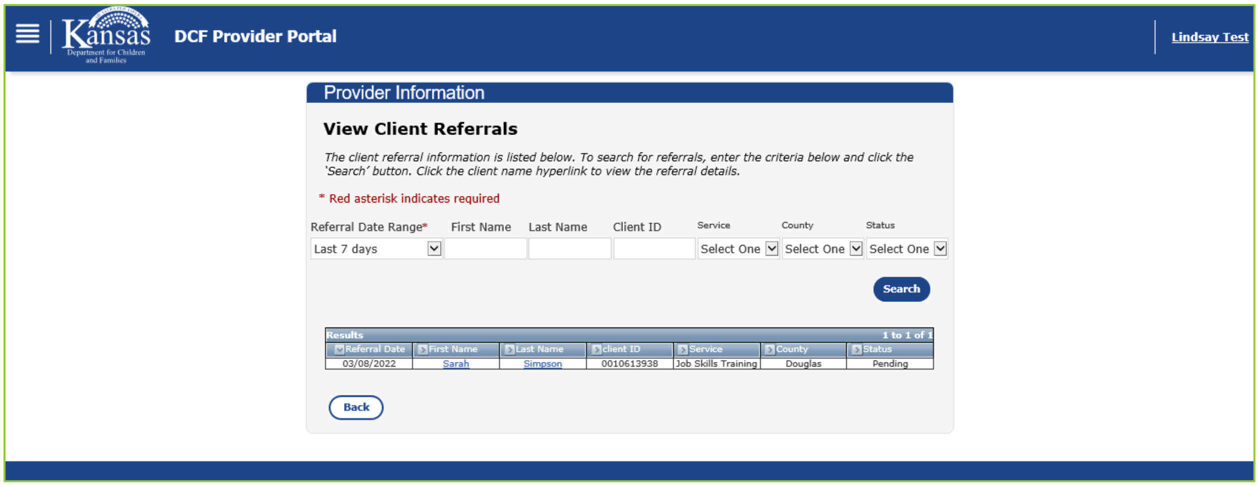
1. To search for client referral information:

   a. Click the **View Client Referrals** hyperlink from the home screen.



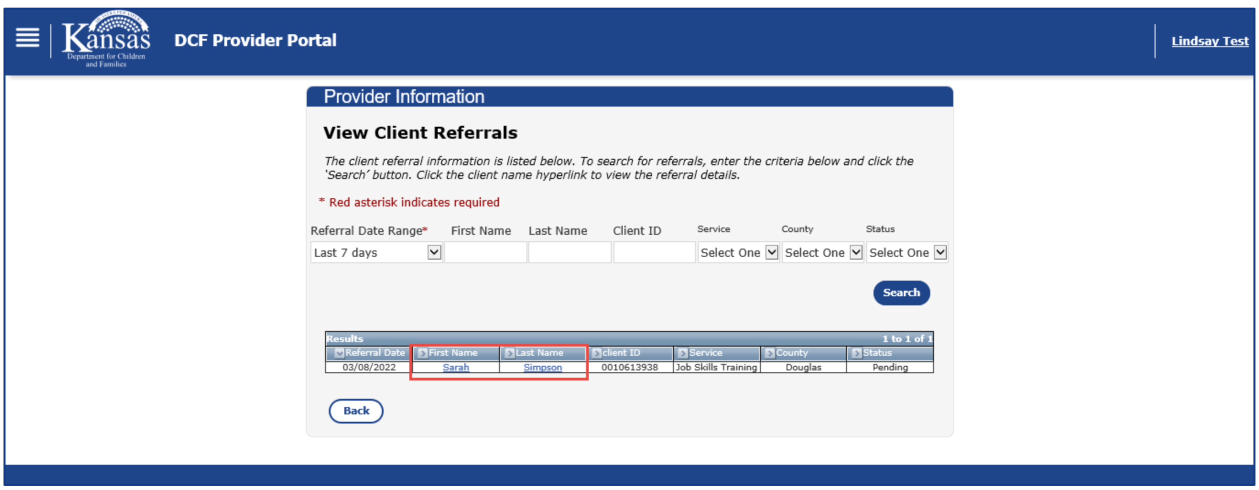
   b. The **View Client Referrals** screen lists the client referrals associated with you as a service provider. Enter your search criteria (referral date range, name, client ID, service, county and/or status), and then click the **Search** button. If you do not have any associated referrals, the **View Client Referrals** screen displays *No Data Found*.

   Referrals are sorted in descending order by date, followed by first name. You can change the sorting order by clicking the **>** button at the top of the column by which you want the results sorted.



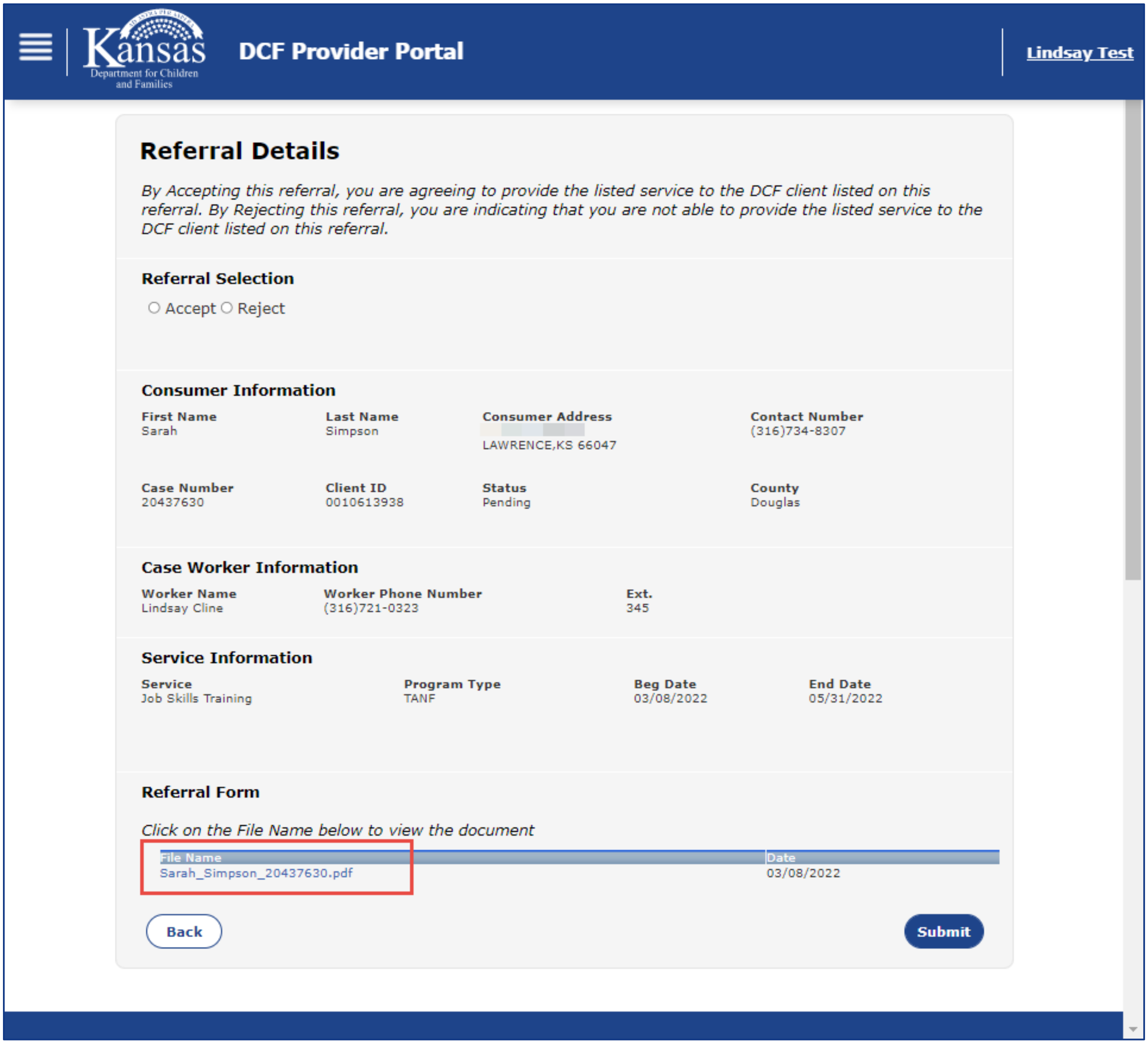
2. To view client referral information:

a) Click on the name hyperlink associated to the referral you wish to view from the **View Client Referrals** screen.



b) The **Referral Details** screen displays the specifics of the referral you selected on the **View Client Referrals** screen. You can access the referral as a .pdf by clicking the hyperlink found under the **File Name** heading of the Referral Form section. To view the .pdf in a new window, click the hyperlink.

c) To return to the **View Client Referrals** screen without *accepting* or *rejecting* a client referral, click the **Back** button.



DCF Provider Portal

Kansas Department for Children and Families

Lindsay Test

Referral Details

By Accepting this referral, you are agreeing to provide the listed service to the DCF client listed on this referral. By Rejecting this referral, you are indicating that you are not able to provide the listed service to the DCF client listed on this referral.

Referral Selection

○ Accept ○ Reject

Consumer Information

First Name	Last Name	Consumer Address	Contact Number
Sarah	Simpson	LAWRENCE,KS 66047	(316)734-8307
Case Number	**Client ID**	**Status**	**County**
20437630	0010613938	Pending	Douglas

Case Worker Information

Worker Name	Worker Phone Number	Ext.
Lindsay Cline	(316)721-0323	345

Service Information

Service	Program Type	Beg Date	End Date
Job Skills Training	TANF	03/08/2022	05/31/2022

Referral Form

Click on the File Name below to view the document

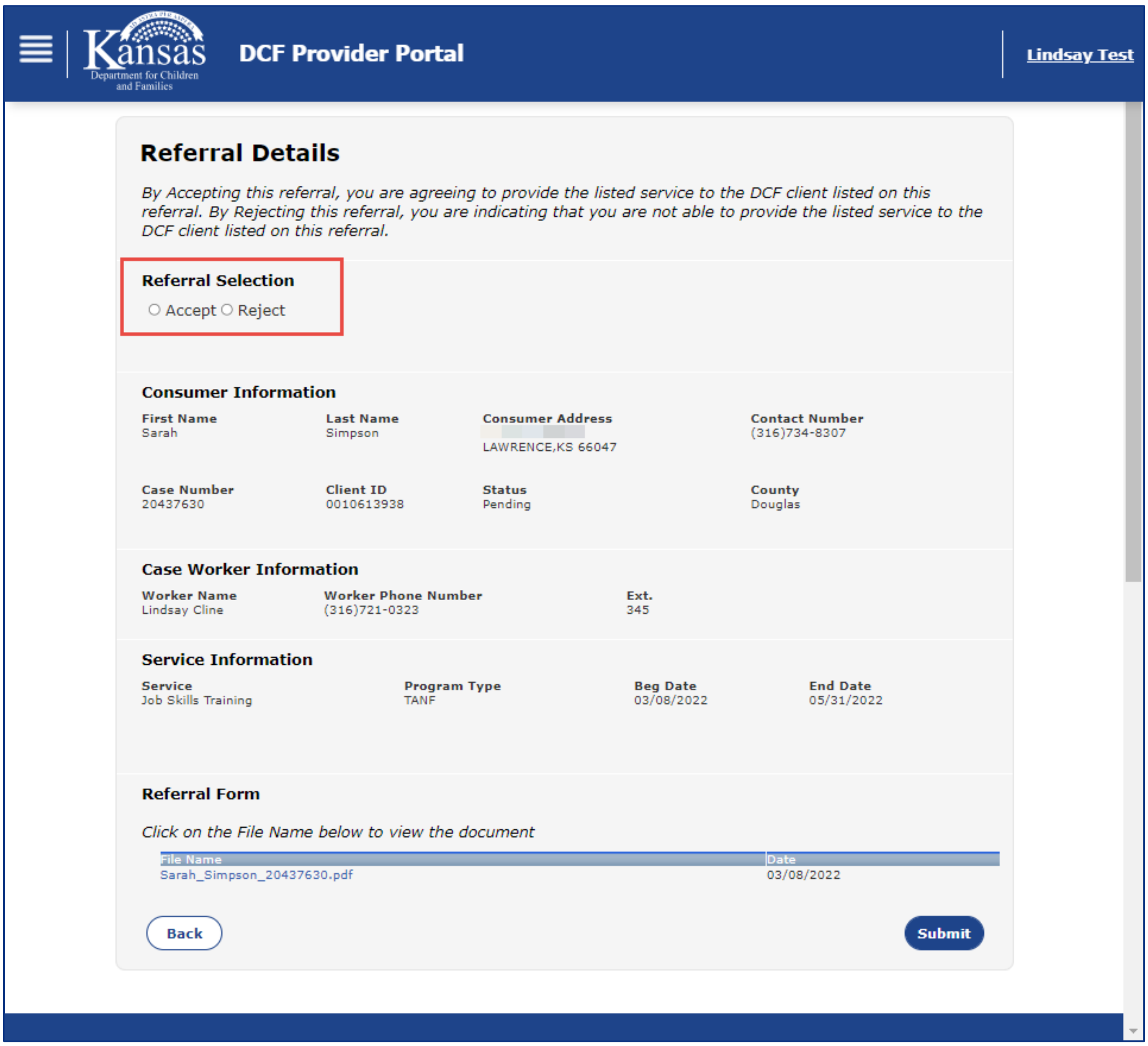
File Name	Date
Sarah_Simpson_20437630.pdf	03/08/2022

Back Submit

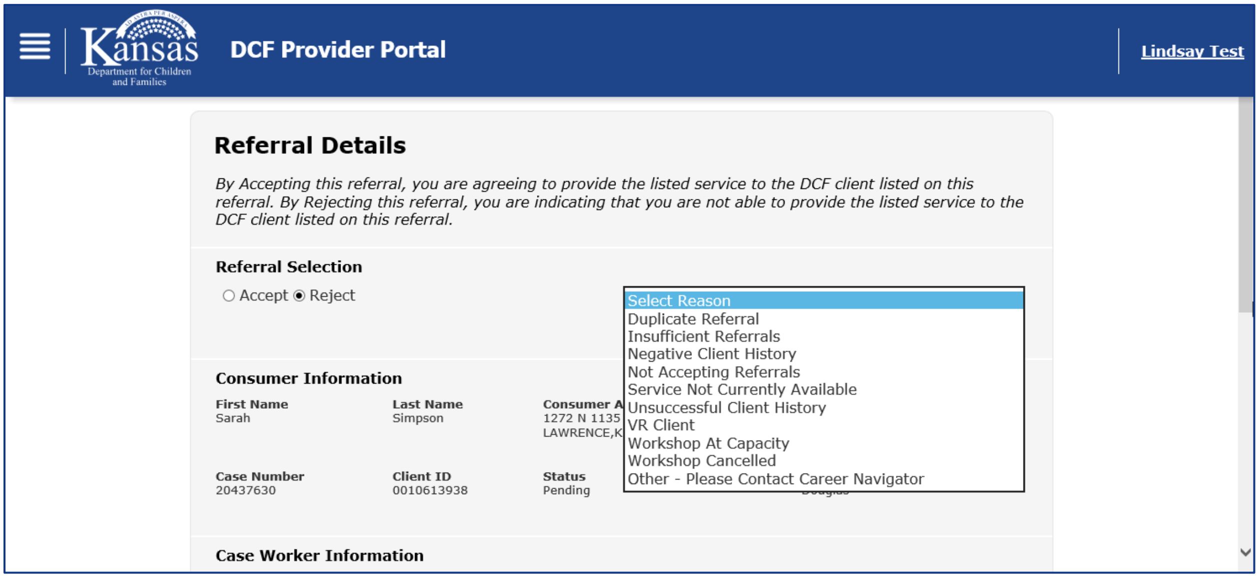
3. To Accept or Reject a client referral:

After reviewing the client's referral details, you need to let DCF know if you *Accept* or *Reject* the referral. By *Accepting* the referral, you are agreeing to provide the listed service to the DCF client listed on the referral. By *Rejecting* the referral, you are indicating that you are not able to provide the listed service to the DCF client listed on the referral.

a) Select the **Accept** or **Reject** radio button under the **Referral Selection** header on the **Referral Details** screen.



b) If you select *Reject*, please select a **Rejection Reason**.



c) Click the **Submit** button to notify DCF of your referral selection.

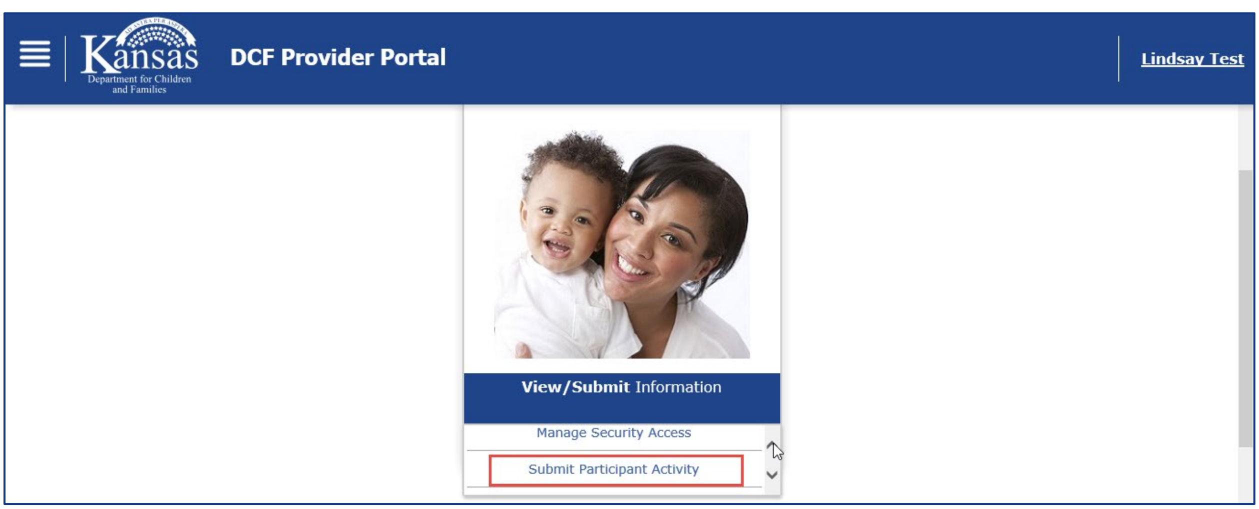
d) Click **Back** button to return the **View Client Referrals** screen.

Entering Client Attendance

Reminder: Attendance needs to be submitted to DCF through the Provider Portal every Tuesday for the previous week.

To submit client attendance:

1. Sign in to your account and click the **Submit Participant Activity** hyperlink from the home screen.



2. Search for the Client

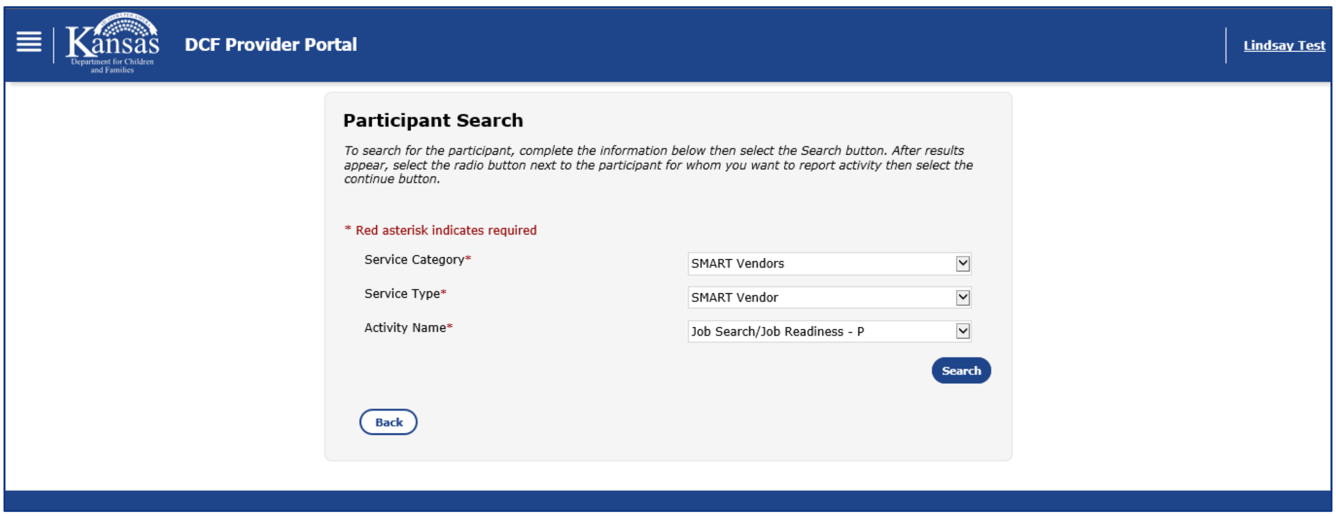
Use the **Participant Search** screen to search for clients.

a) **Service Category** - Select *SMART Vendors* if you have a *SMART Vendor ID*. Select *Resource* if you do not have a *SMART Vendor ID*. Once you have selected a service category, additional drop-down menus display.

b) **Service Type**: Select *SMART Vendor* if you already selected *SMART Vendors* as your **Service Category**. Otherwise, select the type of service you provide the client.

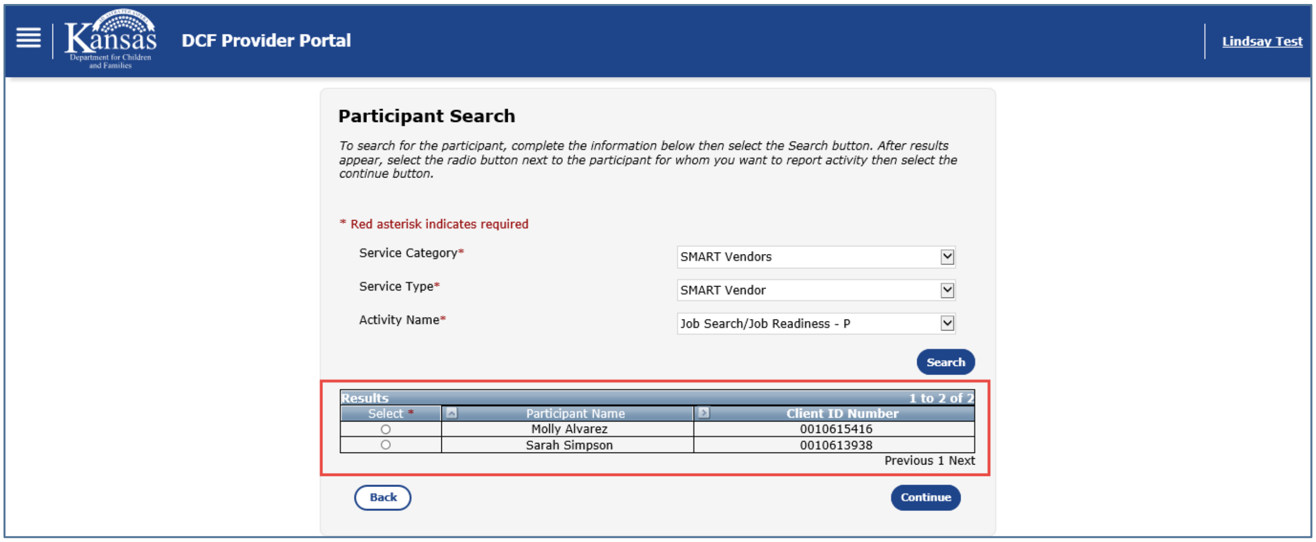
c) **Activity Name**: Select an *Activity Name* from the drop-down menu. If there is more than one Activity Name in the drop-down menu, perform a search on all of them to see all clients for which you are providing services.

d) Click the **Search** button to view a list of clients participating in the selected *Activity*. Or, click the **Back** button to exit the process and return to the home screen.



3. After clicking the **Search** button, a list of clients will appear. Select the radio button next to the *Participant Name* for which you are reporting attendance and progress.

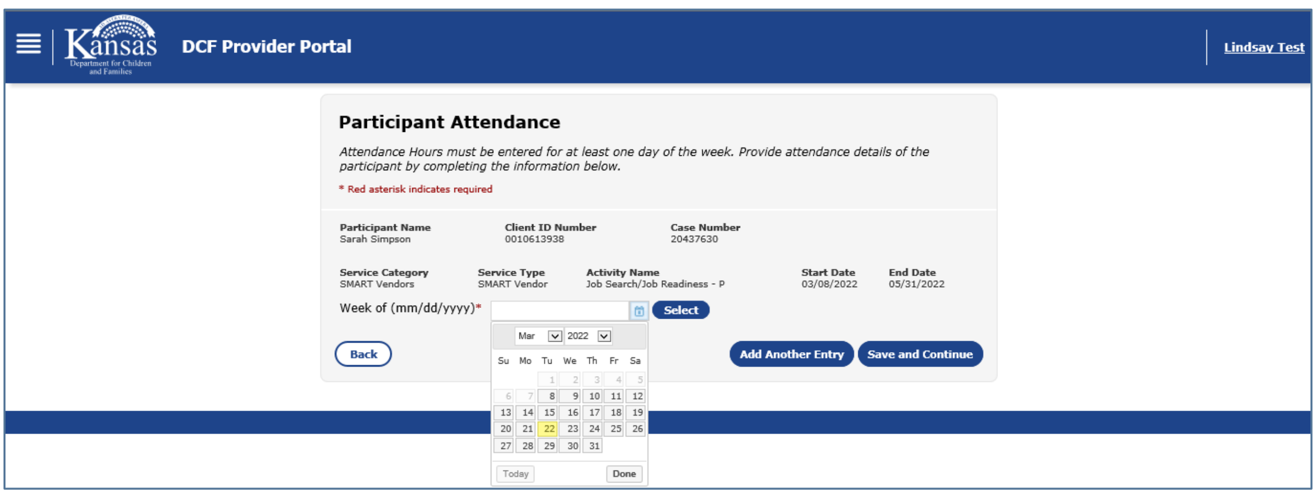
4. Click the **Continue** button to move on or click the **Back** button to exit the process and return to the home screen.



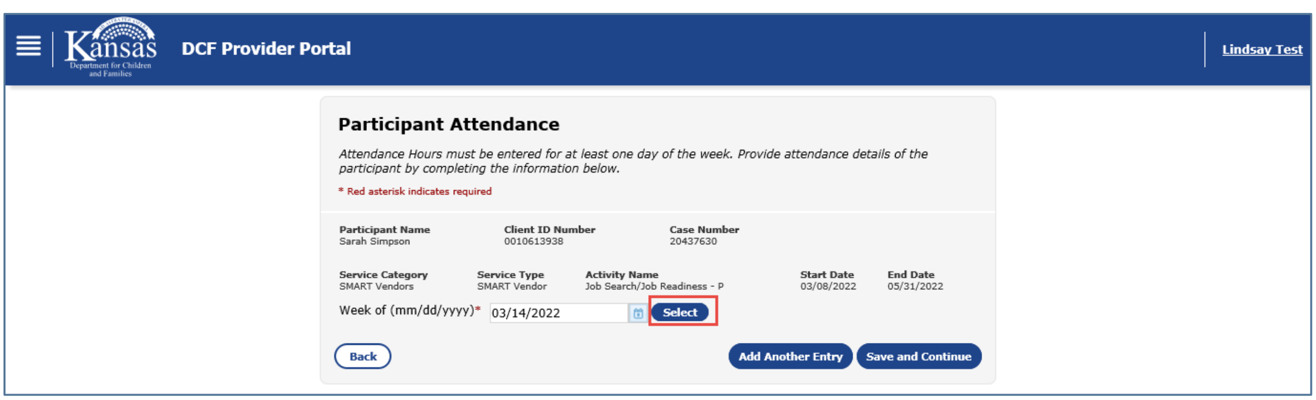
5. Use the **Participant Attendance** screen to submit attendance information for the client you selected from the **Participant Search** screen.

   a) Select the week of attendance you would like to report from the **Week of** calendar text box.

*Note: You cannot select any days prior to the **Start Date** listed on the **Participant Attendance** screen.*



   b) Click the **Select** button to confirm the **Week of** date you would like to report.



You are now able to enter client attendance and progress information for the selected week. The format of the displayed workweek is Monday through Sunday, with the corresponding dates.

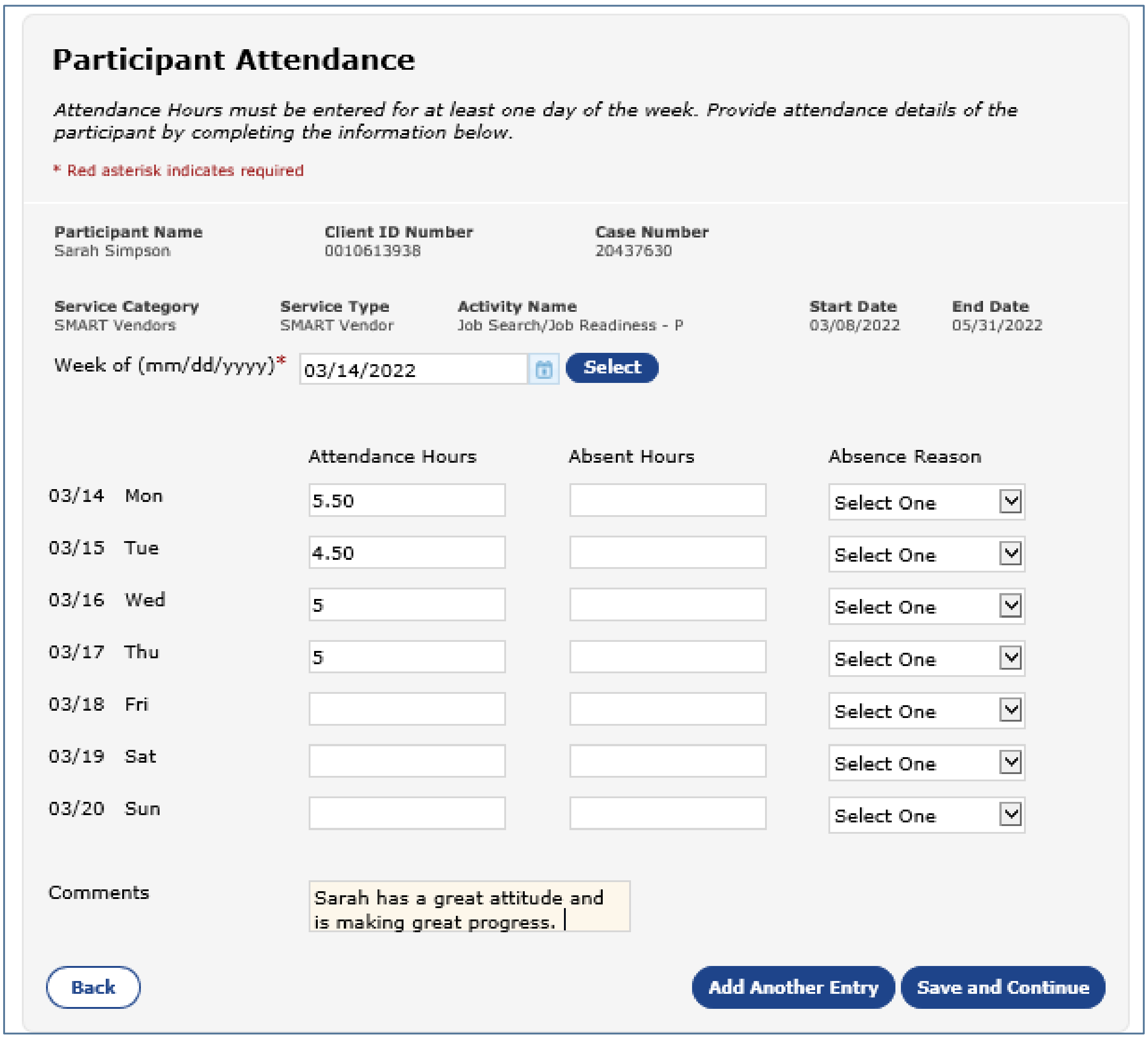
c) Enter the **Attendance Hours** for each day of the week, up to two decimal points. For example, 7.5 or 8.25. If a client did not attend on a certain day, enter 0 in the **Attendance Hours** field.

d) Do not enter anything in the **Absent Hours** field or select an **Absence Reason**.

e) Add any comments to the **Comments** text box for the week. You can enter up to 2000 characters.

Note: *If the client does not meet the schedule hours they were required to attend, you can use the comments box to document why.*

f) You can click the **Add Another Entry** button to report another week of attendance for the client or, click the **Save and Continue** button to move on. You can also click the **Back** button to return to the **Participant Search** screen without saving any information.



Participant Attendance

Attendance Hours must be entered for at least one day of the week. Provide attendance details of the participant by completing the information below.

* Red asterisk indicates required

Participant Name Sarah Simpson | **Client ID Number** 0010613938 | **Case Number** 20437630

Service Category SMART Vendors | **Service Type** SMART Vendor | **Activity Name** Job Search/Job Readiness - P | **Start Date** 03/08/2022 | **End Date** 05/31/2022

Week of (mm/dd/yyyy)* 03/14/2022 Select

	Attendance Hours	Absent Hours	Absence Reason
03/14 Mon	5.50		Select One
03/15 Tue	4.50		Select One
03/16 Wed	5		Select One
03/17 Thu	5		Select One
03/18 Fri			Select One
03/19 Sat			Select One
03/20 Sun			Select One

Comments: Sarah has a great attitude and is making great progress.

Back | Add Another Entry | Save and Continue

6. Next, you can provide copies of any documents you have to support the client's attendance information. The documents can be uploaded on the **Verification Documents** screen.

   If you do not have any documents to upload, click the **Save and Continue** button and proceed to step 7, or click the **Back** button to return to the **Participant Attendance** screen.

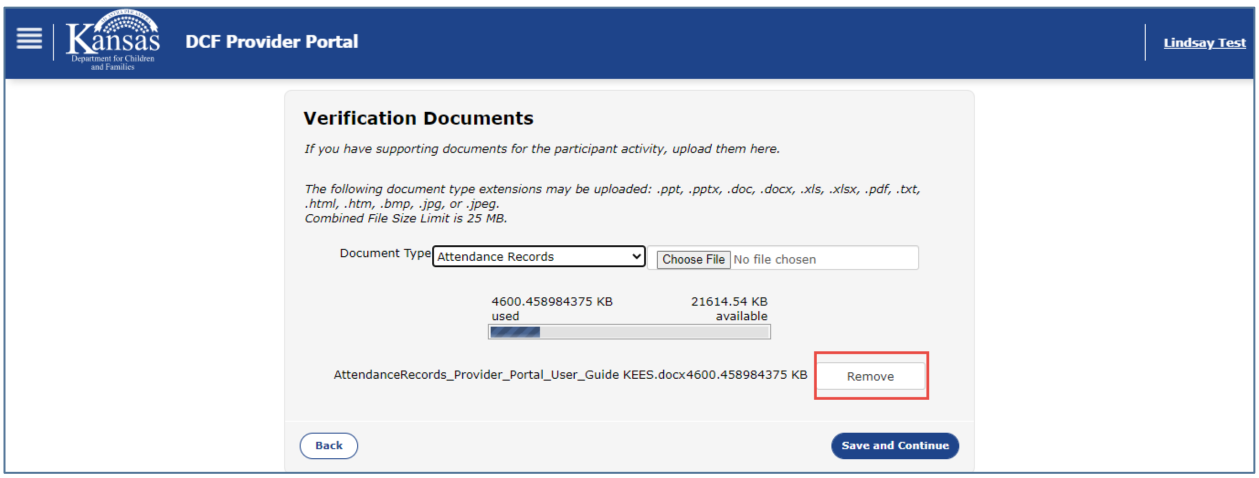
   a) To upload a document, select the **Document Type** and click the **Choose File** button. You can upload documents with file sizes totalling up to 25 MB. If the upload is larger than 25 MB, an error message displays.

*Note: If using Internet Explorer, click the **Browse** button.*

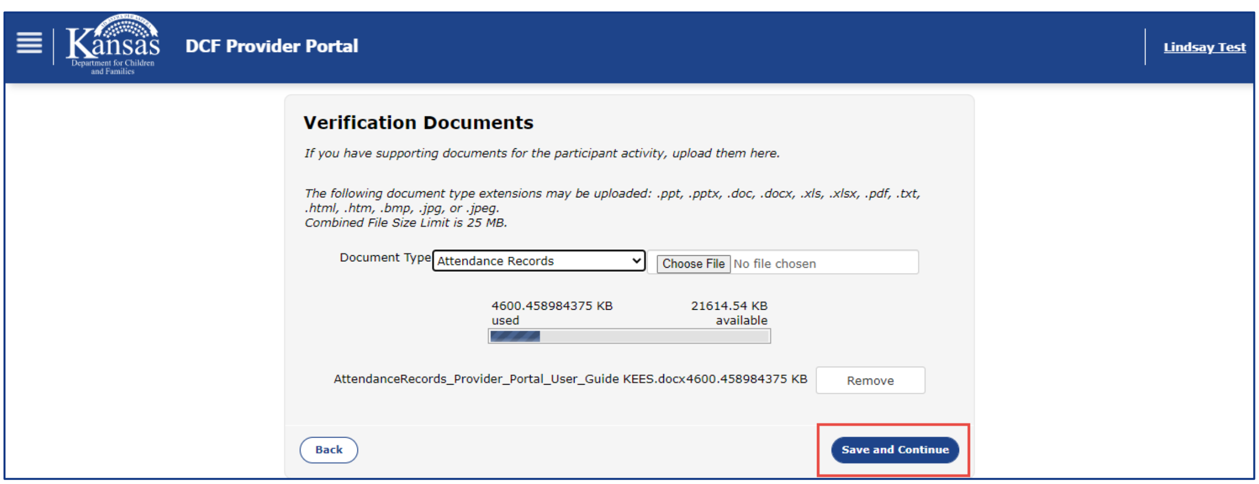
   b) The document has been added successfully if the file name appears just below the **Choose File** button.

   c) To add more documents, repeat these steps as many times as you need. You can also return to the Provider Portal later and upload additional documents.

   d) To remove a file from the list of uploaded documents, click the **Remove** button next to the document file name.



   e) Click the **Save and Continue** button to move forward.



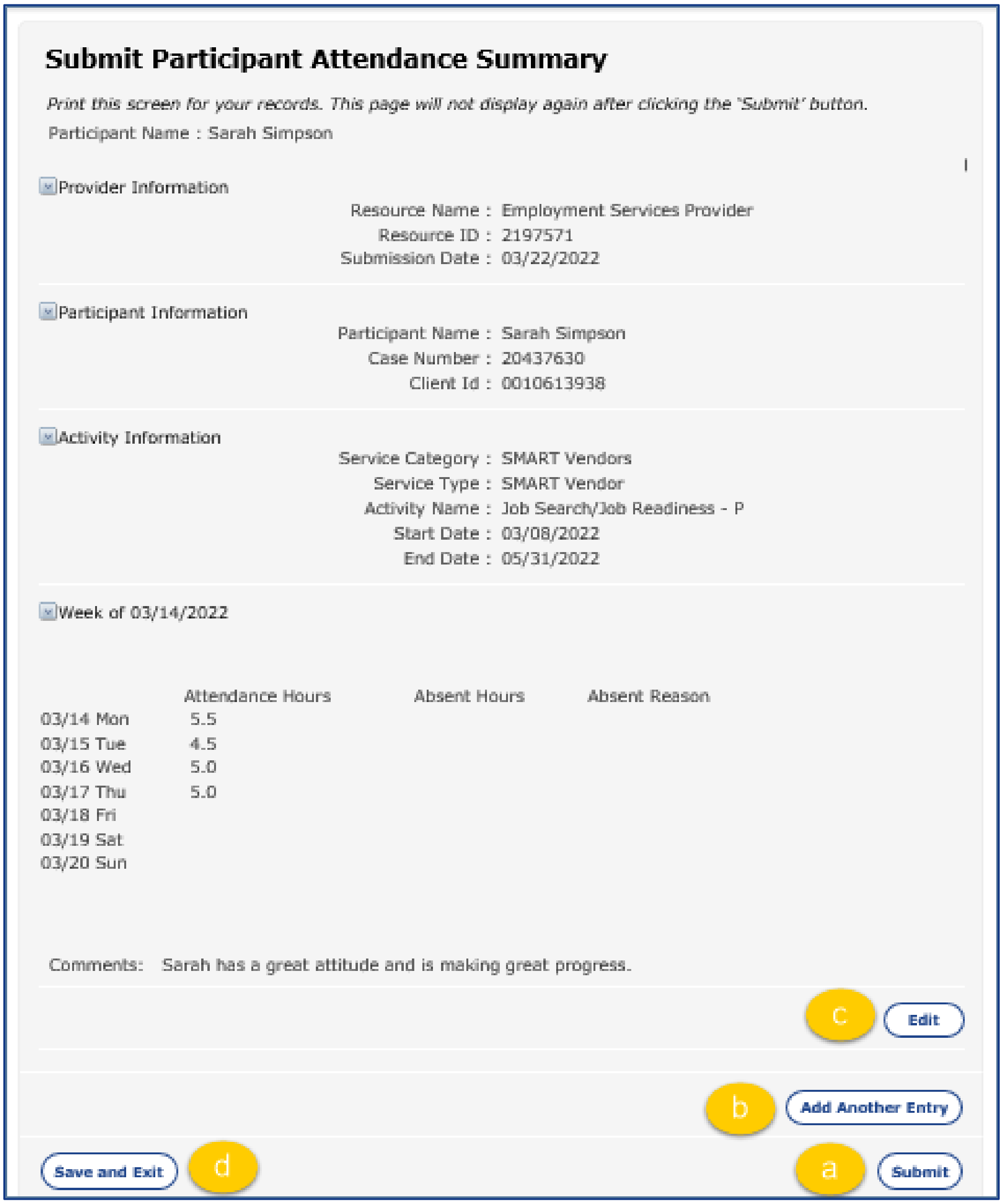
7. The **Submit Participant Attendance Summary** screen displays with a summary of the client attendance information you entered. Take a moment to review the information.

   a) If you are satisfied with the information you provided and are ready to send it to DCF, click the **Submit** button.

   b) If you need to report another week of attendance for the client, click the **Add Another Entry** button.

   c) You can change anything entered using the **Edit** button. If you uploaded documents on the previous screen, you will need to re-upload them after you edit the information.

   d) Click the **Save and Exit** button to save the client attendance information without submitting it to DCF. You have 60 days to return to the Provider Portal and submit any saved client attendance records before they are automatically deleted.



Submit Participant Attendance Summary

Print this screen for your records. This page will not display again after clicking the 'Submit' button.

Participant Name : Sarah Simpson

Provider Information

Resource Name : Employment Services Provider
Resource ID : 2197571
Submission Date : 03/22/2022

Participant Information

Participant Name : Sarah Simpson
Case Number : 20437630
Client Id : 0010613938

Activity Information

Service Category : SMART Vendors
Service Type : SMART Vendor
Activity Name : Job Search/Job Readiness - P
Start Date : 03/08/2022
End Date : 05/31/2022

Week of 03/14/2022

	Attendance Hours	Absent Hours	Absent Reason
03/14 Mon	5.5		
03/15 Tue	4.5		
03/16 Wed	5.0		
03/17 Thu	5.0		
03/18 Fri			
03/19 Sat			
03/20 Sun			

Comments: Sarah has a great attitude and is making great progress.

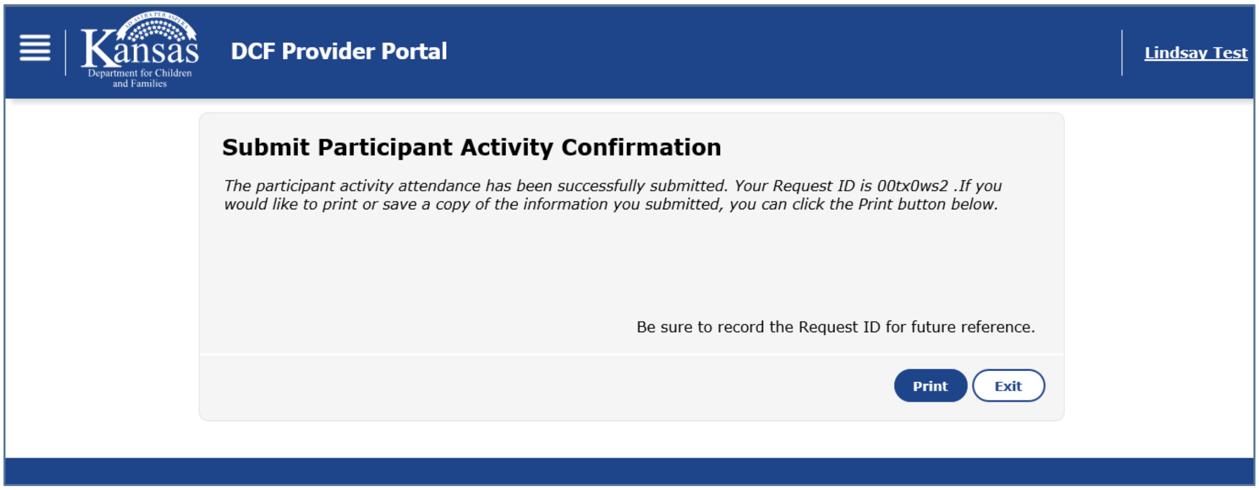
c Edit

b Add Another Entry

Save and Exit d

a Submit

8. The **Submit Participant Activity Confirmation** screen displays the confirmation message for the submitted client attendance. Click the **Print** button to save or print a *PDF* copy of what you submitted. Click the **Exit** button to return to the home screen.



If the system was unable to process your request, an error message displays that reads: An Error Occurred. We are not able to accept your submission at this time. Your data is saved. You can resubmit the attendance at a later time.

The information you entered has been saved, but you must submit the client attendance you are reporting by resuming and completing the submission from the **Continue Submit Participant Activity** screen. See the Continuing Saved but Not Submited Client Attendance Information section below for details.

Continuing Saved but Not Submitted Client Attendance Information

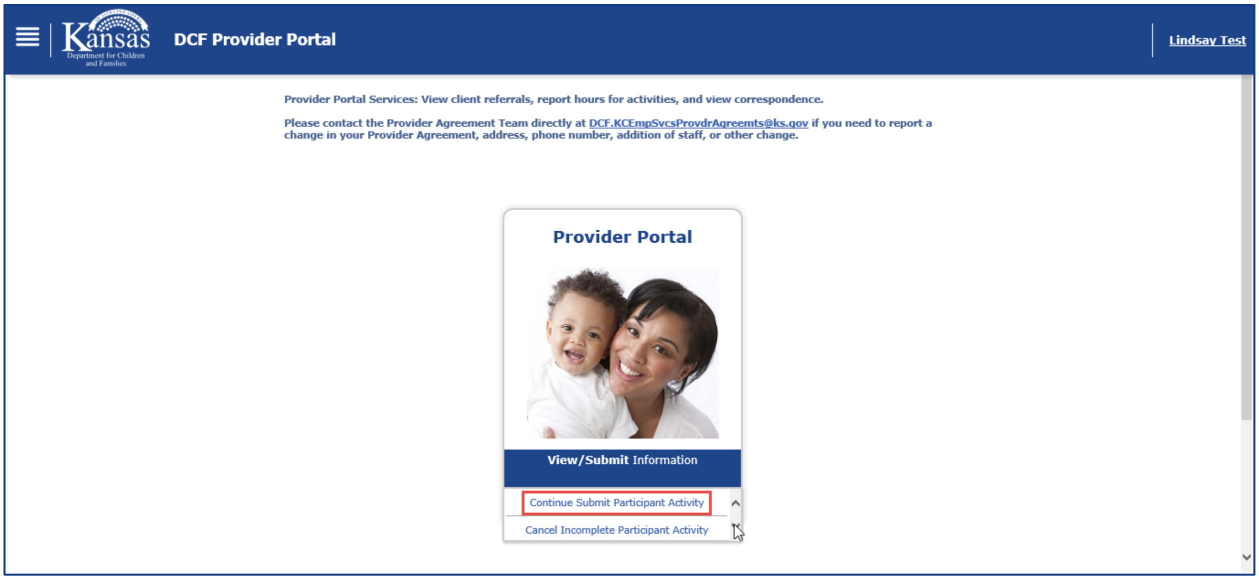
Use the **Continue Submit Participant Activity** screen to continue or complete a submission of client activity that was previously started and saved but not submitted. You have 60 days to submit any saved client attendance records before they are automatically deleted.

This applies to the following scenarios:

- Clicking the Save and Exit button from the Submit Participant Attendance Summary screen, or
- Clicking the **Exit** button from the **Confirmation Message** screen when you are notified that an error occurred.

To resume and complete your submission:

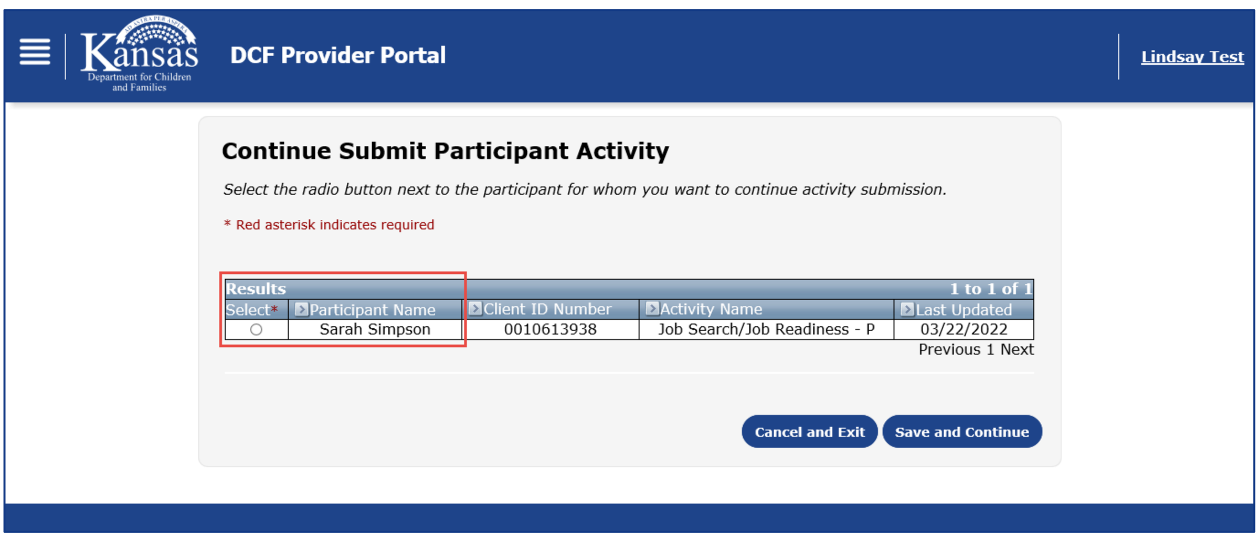
1. Log in to your account.
2. Click the **Continue Submit Participant Activity** hyperlink on the home screen.



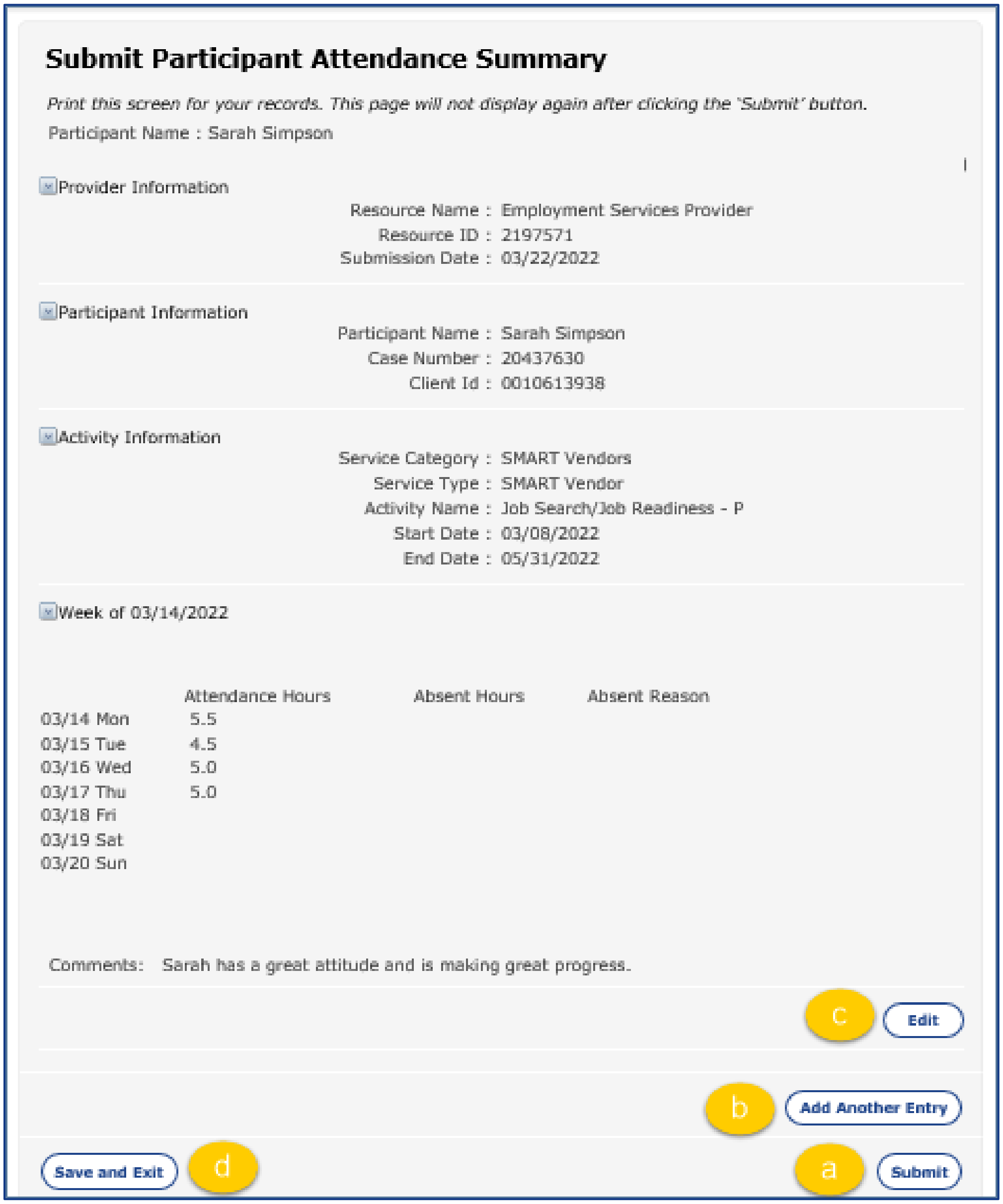
3. The **Continue Submit Participant Activity** screen displays.

   a) Select the *Participant Name* record you want to submit.

   b) Click the **Save and Continue** button to continue or click the **Cancel and Exit** button to return to the home screen.



4. The **Submit Participant Attendance Summary** screen displays with a summary of the client attendance information you entered. Take a moment to review the information.



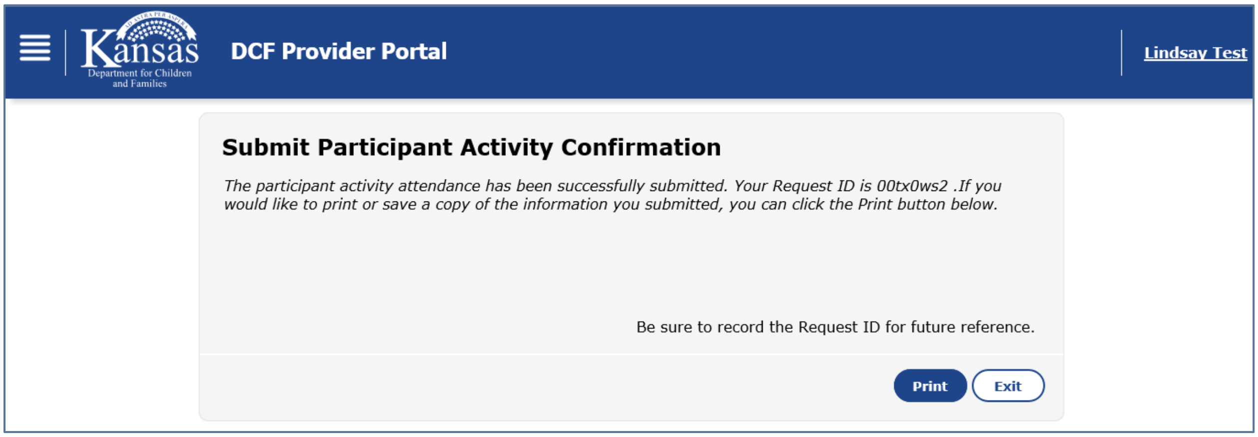
a) If you are satisfied with the information you provided and are ready to send it to DCF, click the **Submit** button.

b) If you need to report another week of attendance for the client, click the **Add Another Entry** button.

c) You can change anything entered using the **Edit** button. If you uploaded documents on the previous screen, you will need to re-upload them after you edit the information.

d) Click the **Save and Exit** button to save the client attendance information without submitting it to DCF. You have 60 days to return to the Provider Portal and submit any saved client attendance records before they are automatically deleted.

5. The **Submit Participant Activity Confirmation** screen displays the confirmation message for the submitted participant activity. Click the **Print** button to save or print a *PDF* copy of what you submitted. Click the **Exit** button to return to the home screen.



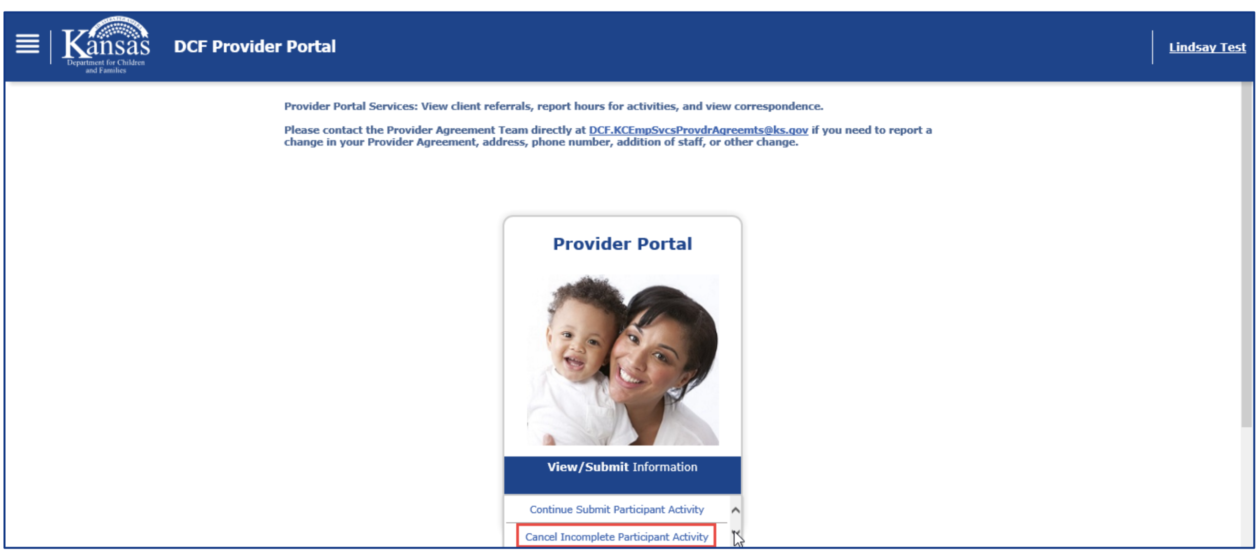
If the system was unable to process your request, an error message displays that reads: An Error Occurred. We are not able to accept your submission at this time. Your data is saved. You can resubmit the attendance at a later time.

The information you entered has been saved, but you must submit the client attendance you are reporting by resuming and completing the submission from the **Continue Submit Participant Activity** screen.

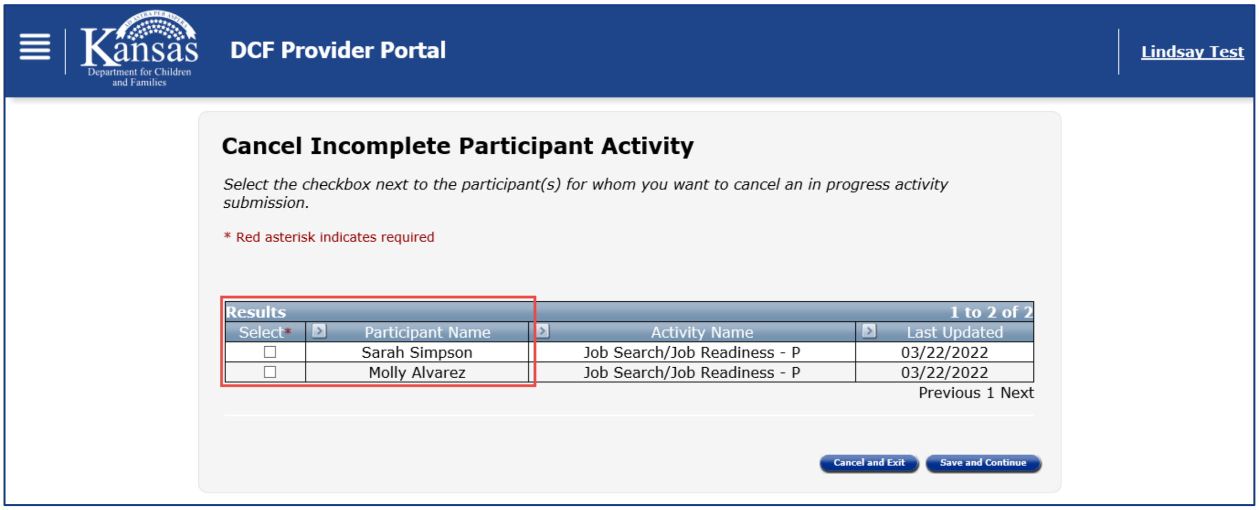
Cancelling Incomplete Client Attendance Information

There are times when you may start to submit client attendance in the Provider Portal but are unable to complete and submit it as that time, so you save it for later. If you decide not to submit the saved client attendance information, you are able to delete it. Use the **Cancel Incomplete Participant Activity** screen to select and cancel a submission of client attendance information not yet submitted.

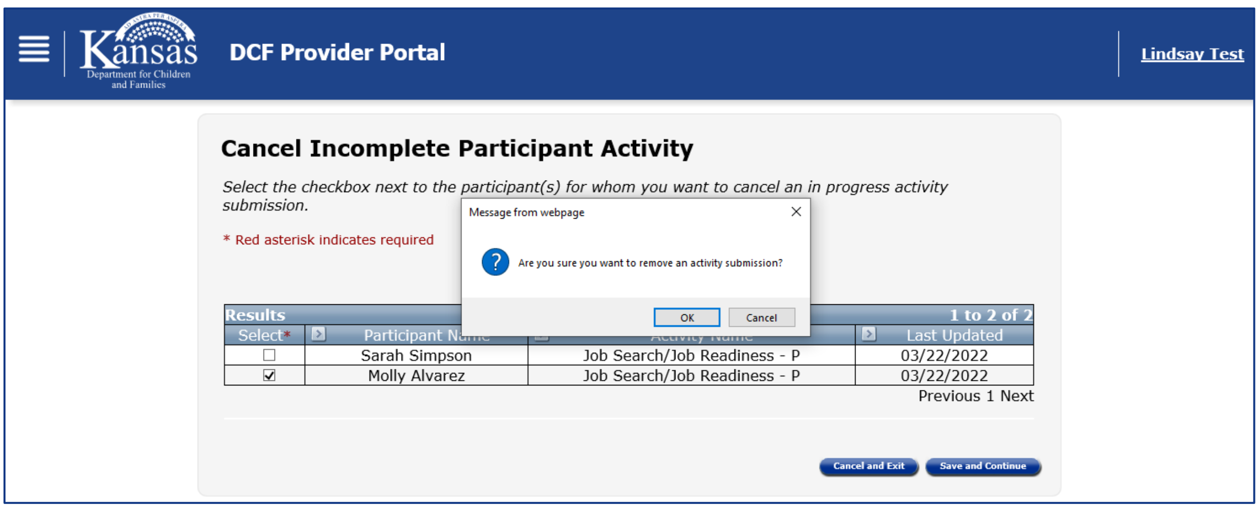
1. Begin by logging in to your account.
2. From the home screen, click the **Cancel Incomplete Participant Activity** hyperlink



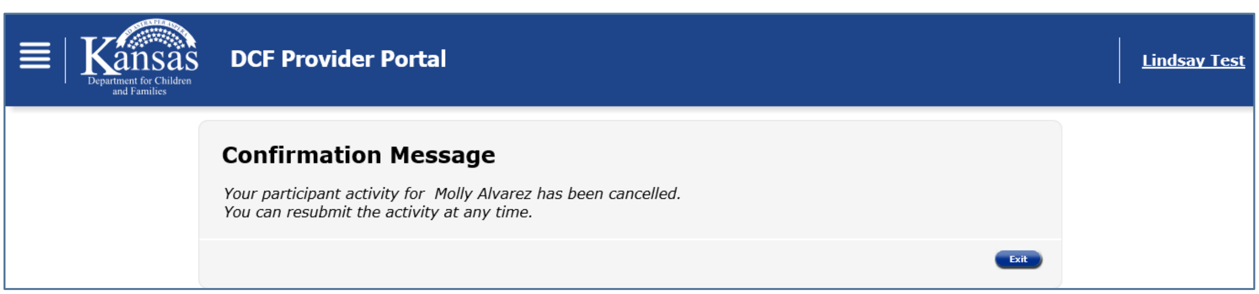
3. The **Cancel Incomplete Participant Activity** screen displays. Next, select the *Participant Name* record you want to delete.
4. Click the **Save and Continue** button to delete the record or click the **Cancel and Exit** button to return to the home screen.



5. A warning message displays to confirm you want to remove the incomplete information. If you are sure, click the **Ok** button to continue, or click the **Cancel** button to stop the process.



6. Finally, the **Confirmation Message** screen displays a message confirming your cancellation. Click the **Exit** button to return to the home screen.

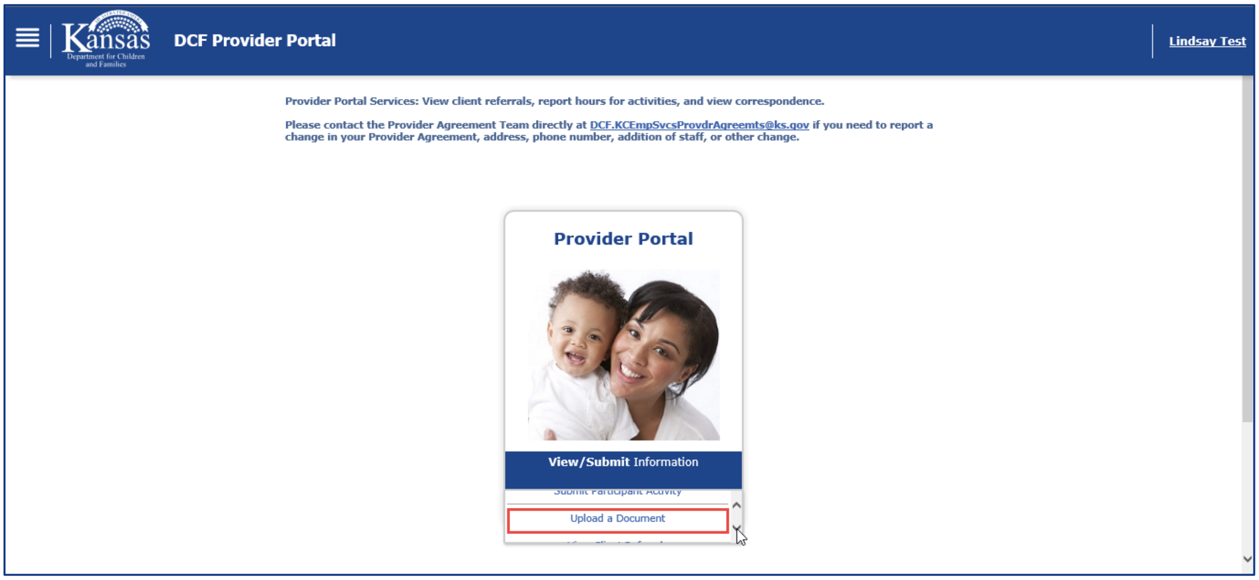


Uploading a Document

You can upload documents any time in the Provider Portal. The combined file size cannot exceed 25 MB. Accepted document type extensions include: .ppt, .pptx, .doc, .docx, .xls, .xlsx, .pdf, .txt, .html, .htm, .bmp, .jpg, or .jpeg.

To upload a document:

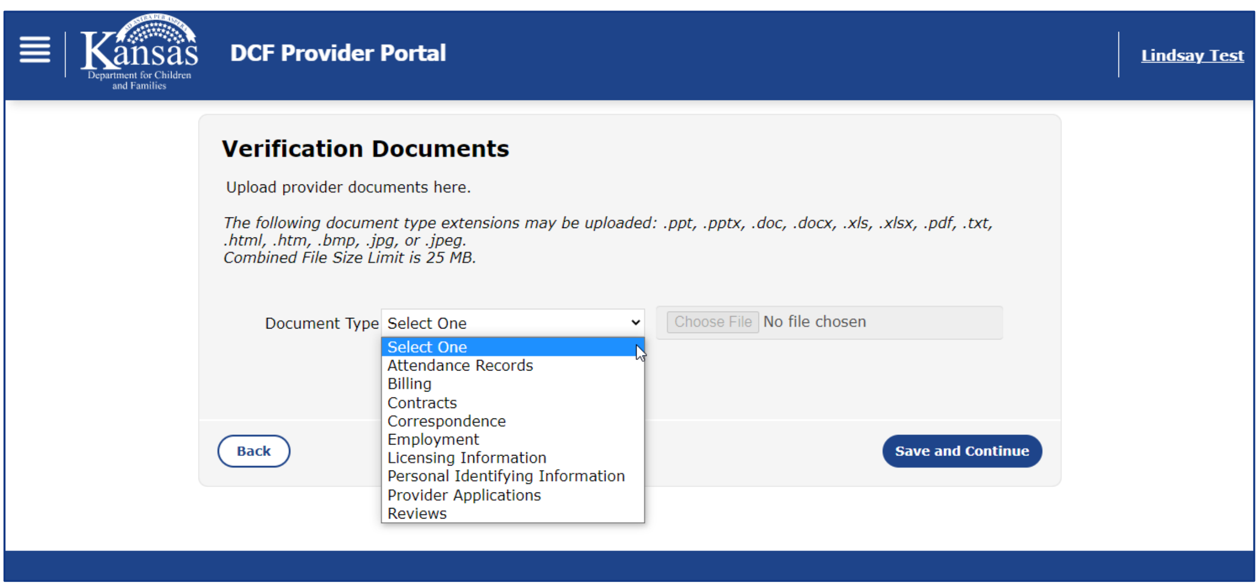
1. Sign into your secure account and click the **Upload a Document** hyperlink.



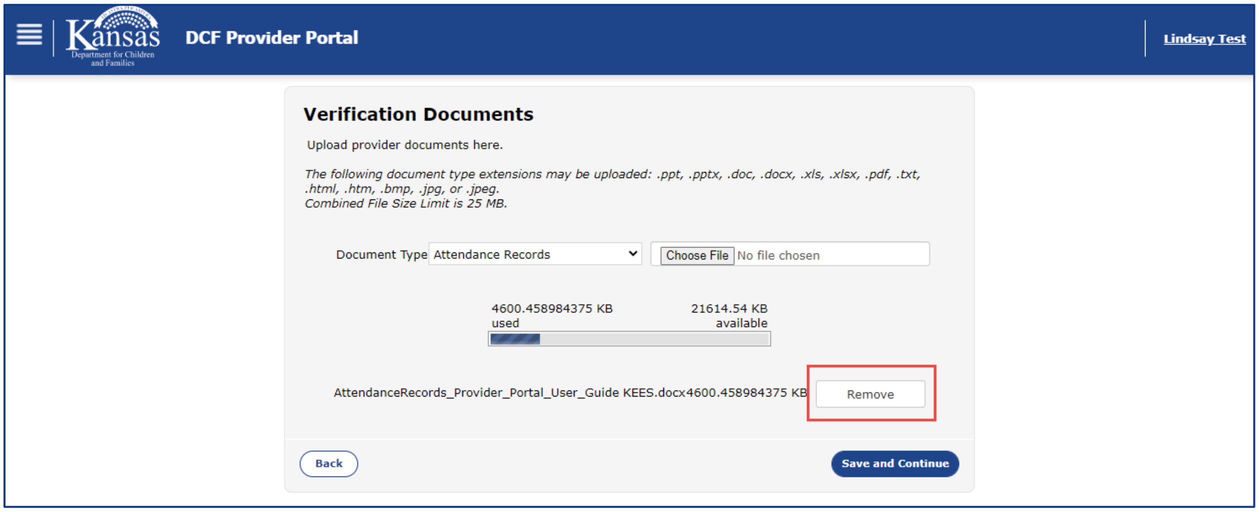
2. To upload a document, select the **Document Type** and click the **Choose File** button. ***Note:*** *If using Internet Explorer, click the Browse button.*

3. The document has been added successfully if the name appears just below the **Choose File** button.

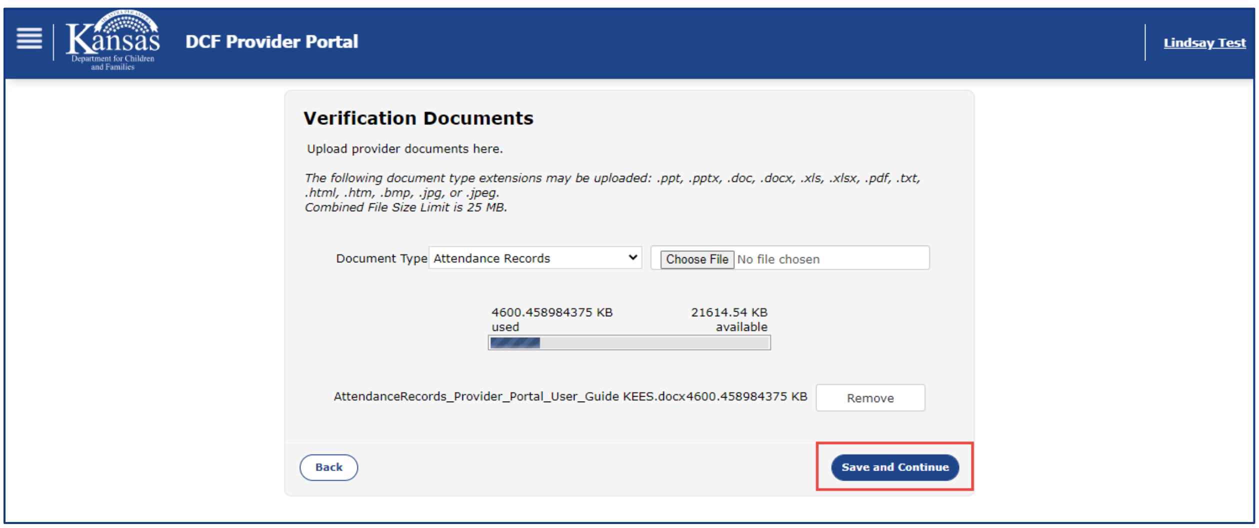
4. To add more documents, repeat these steps as many times as you need. You can also return to the Provider Portal later and upload additional documents.



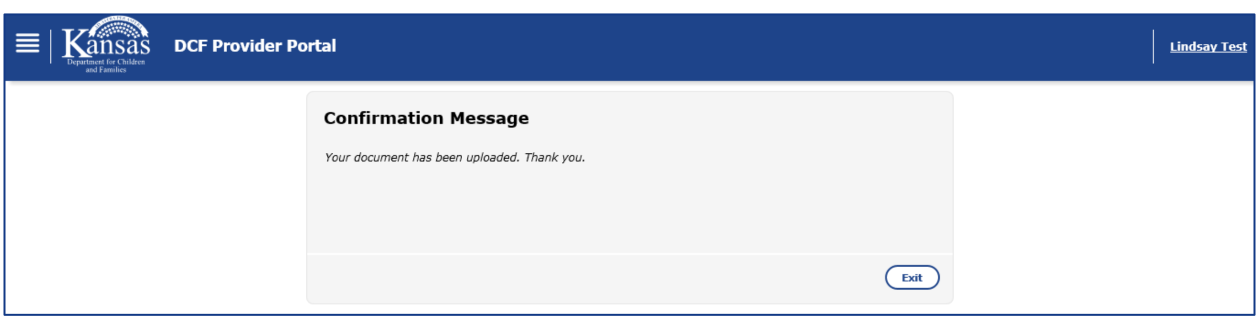
5. To remove a file from the list of uploaded documents, click the **Remove** button next to the document file name.



6. When finished, click the **Save and Continue** button.



7. You will receive a **Confirmation Message** indicating that the request was submitted. Click the **Exit** button to return to the home screen.



Managing Security Access

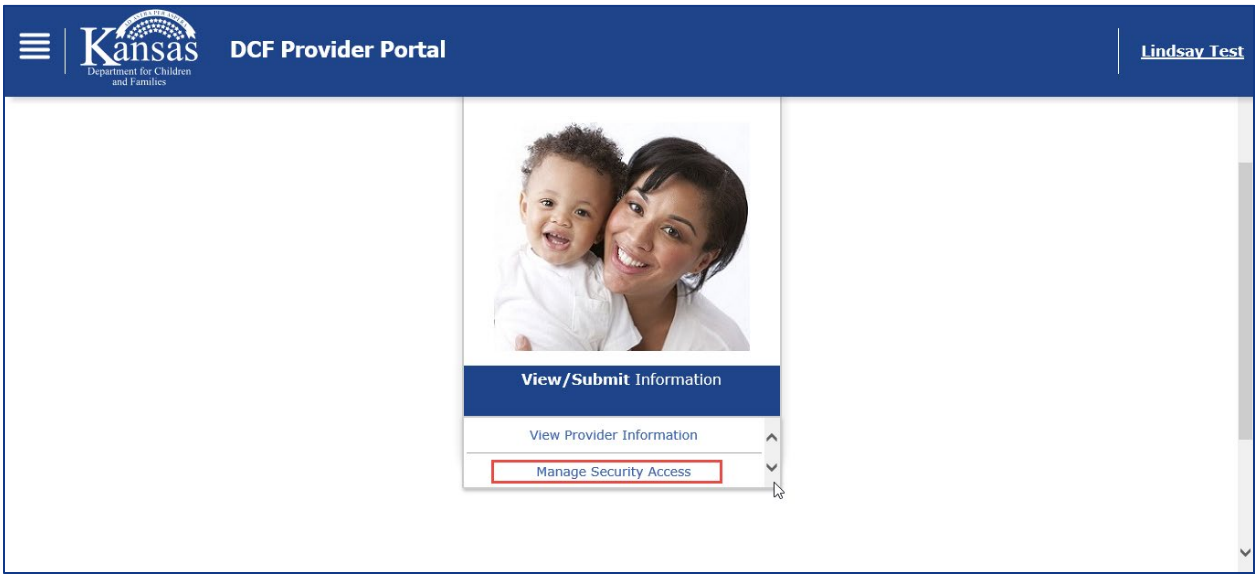
Account holders with an *Administrator* security role can mange Provider Portal security access for employees within their organization that also use the portal. They can remove access for a user by unlinking their account or update their security role.

Unlinking a User's Access

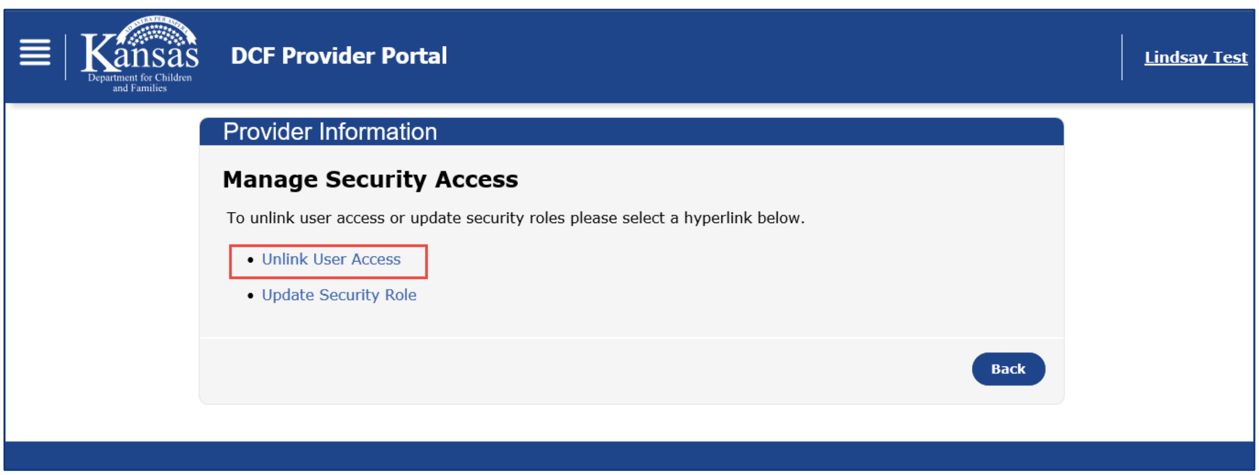
Use the **Unlink User Access** screen to unlink a user from a provider account so he or she no longer has access to the Provider Portal. Only users with an *Administrator* security role can submit a request to unlink a user.

To unlink a user:

1. Sign into your secure account and click the **Manage Security Access** hyperlink.

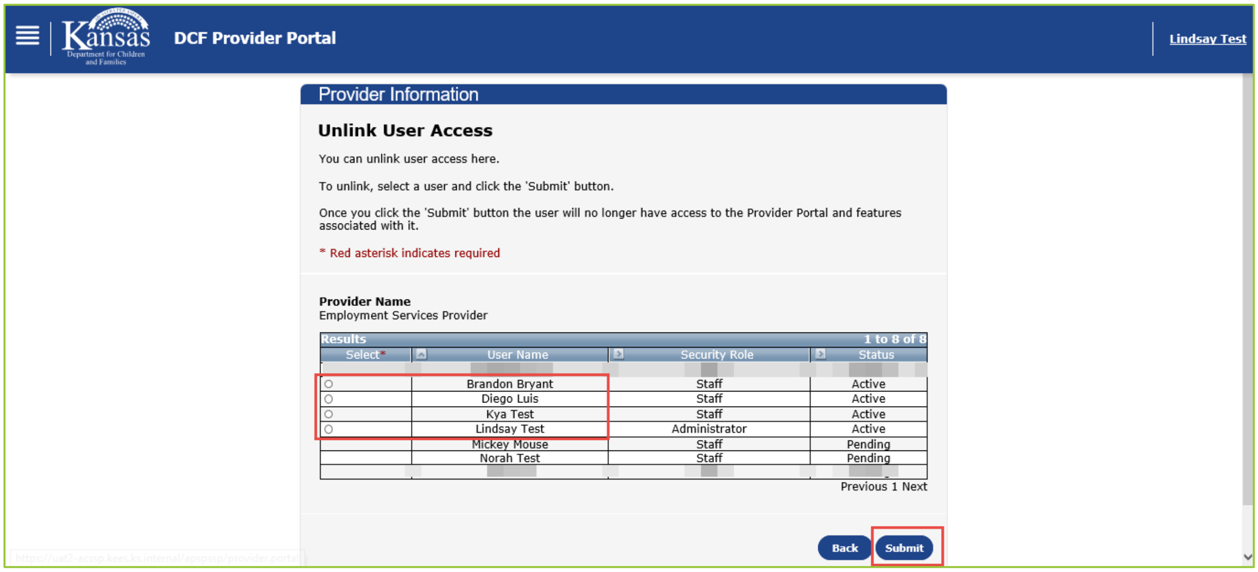


2. The **Manage Security Access** screen displays. Click the **Unlink User Access** hyperlink.

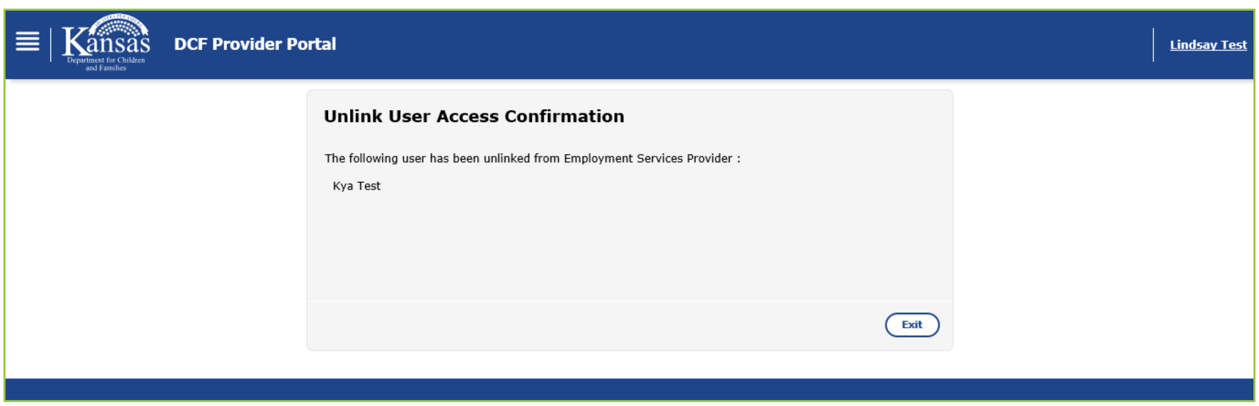


3. The **Unlink User Access** screen displays. Select the radio button associated to the username you want to unlink user access from and click the **Submit** button.

   Click the **Back** button to stop the process and return to the home screen.



4. The Unlink User Confirmation Message screen displays. Click the **Exit** button to return to the home screen.

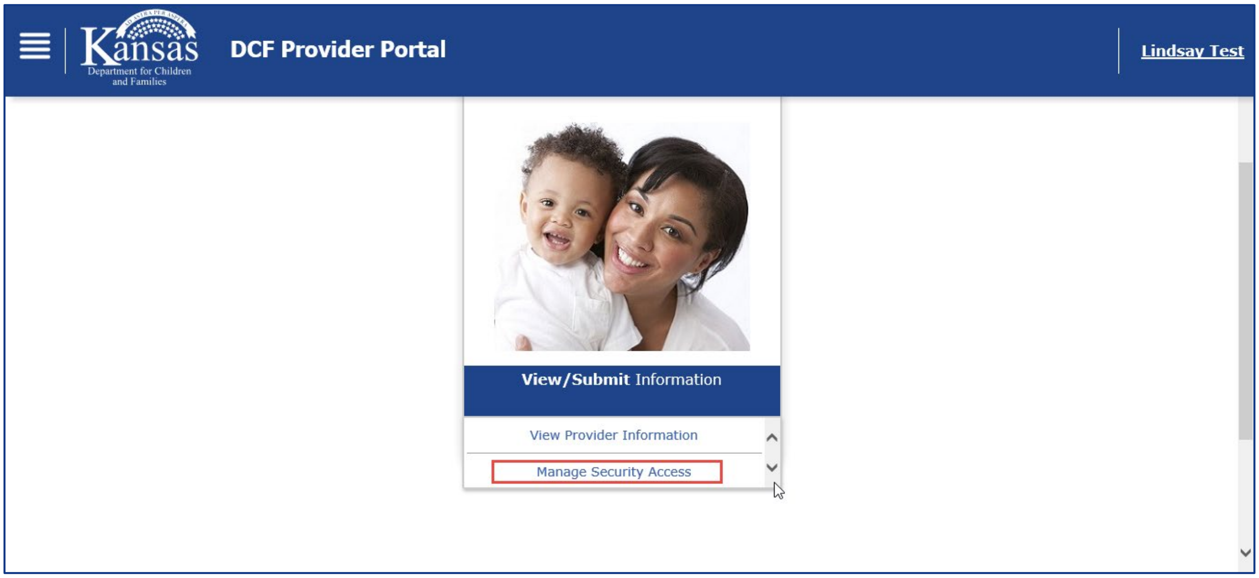


Updating a User's Security Access

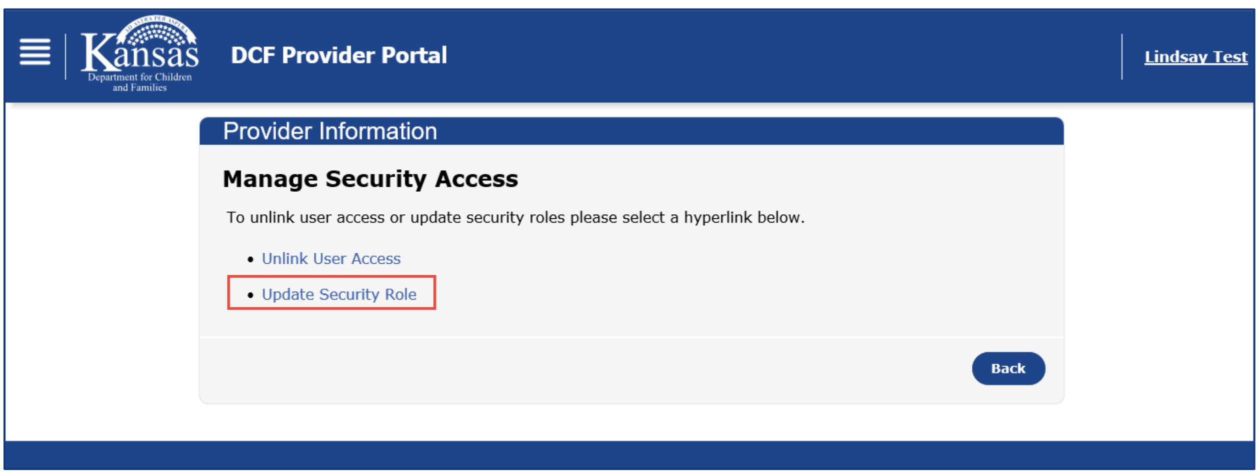
Use the **Update Security Role** screen to change the security access for other users linked to the same provider. Only users with an administrator role can update a security role for a user.

To access this screen:

1. Sign into your secure account and click the **Manage Security Access** hyperlink.



2. The **Manage Security Access** screen displays. Click the **Update Security Role** hyperlink.



3. The **Update Security Role** screen displays. Select the **Security Role** radio button of *Administrator* or *Staff* associated to the username you want to update security for and click the **Save and Continue** button.

   Click the **Back** button to stop the process and return to the **Manage Security Access** screen.

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Department for Children and Families