

User Guide Updates- Areas to Highlight

This document is intended to streamline review of updates made to the Provider Portal and Coalition Portal user guides. Given the volume of updates made, this may not be a comprehensive list, but rather is intended to highlight key areas.

Changes made to this guide include revisions to previous content (such as new screenshots and/or text) and creation of new content (such as new sections for new and/or revised processes).

Content Overview

Provider Portal User Guide

- Updates to the Sign-in and Sign-up/Register processes with SSO
- Updates to the Provider Portal User Roles
- Removal of sections no longer applicable with SSO (i.e. account management in portal, forgot password process in portal, sign-in page section etc.)

Coalition Portal User Guide

- Updates to the Sign-in and Sign-up processes with SSO for the Coalition Portal
- Updates to the Coalition Portal User Roles
- Removal of Sections no longer applicable with SSO (i.e. account management in portal, forgot password process in portal, sign-in page section etc.)
- Updates to the Family Portal Sign-in and Sign-up processes
- Updates to the Forgot password and Forgot username processes in SSO
- Replacement of old Family Portal screenshots with new look of Portal (includes landing page, home page, Eligibility Verification etc.)
- Updates to the Provider registration approval process- this includes the approval in the portal and direction for set-up needed for SSO set up

Pages/ Sections with Updates

****Not a comprehensive list as screenshots were updated where applicable throughout the documents***

Provider Portal User Guide

Pages/sections:

- Document Overview (6)
- Creating a Provider Portal Account (7-11)

- Provider Portal Returning User – Setting Up Single Sign-On (18)
- Provider Portal Returning User with Single Sign-On (18-29)
- Manage Sites (30-33)
- Manage Users (35)

Coalition Portal User Guide

Pages/sections:

- Document Overview (12)
- Logging on to the Coalition Portal with Single Sign-On (13-23)
- Creating a Family Portal Account and Setting up Single Sign-On (24-36)
- Family Portal Returning User- Setting up Single Sign- On (36-48)
- Returning User with Single Sign-on (49-52)
- Password Recovery (52-58)
- Forgot Sign In Name Process (58-60)
- CCAA Users and Child Care Application and Authorization (CCAA) Intake Process (92-96)
- SR Eligibility Process (109-142)
- Assign Counselor (212-218)
- Activating a Provider Account (269- 277)
- Activating a Secondary Location (278-281)