

## **Provider & Family Portals Technical Guide**

This document includes guidance for resolving some of the most commonly reported issues related to the Provider and Family Portals.

### **Download Adobe PDF Reader**

PDF reader software is required to view and print reports throughout the system. Adobe Acrobat Reader comes preinstalled on many computers and can be downloaded at no cost from <http://www.adobe.com/products/acrobat/readmain.html>.

### **Disable Pop-Up Blocker**

Disabling the browser's pop-up blocker is needed to be able to preview available documents within the Portal System. To view step by step instructions, click on one of the following applicable browsers.

- [Internet Explorer](#)
- [Firefox](#)
- [Chrome](#)
- [Safari](#)

### **Registering a New Portal Account**

Registering for a Portal account is required to be able to have access the Portal system. **Important, before registering, please make sure the agency has your valid email address on file.** To view step by step instructions on how to register for a portal account, click [here](#).

### **Resetting a Password**

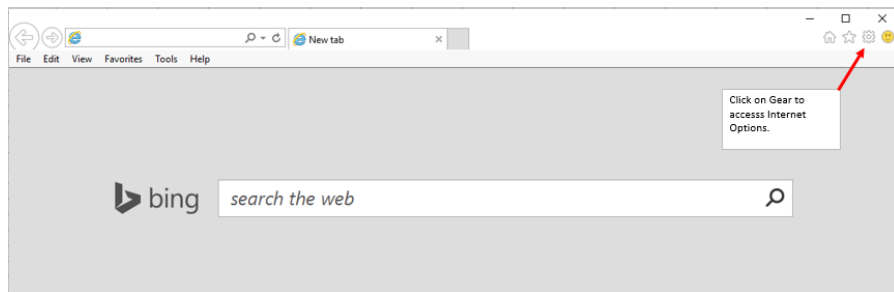
If you forgot your password, you can reset it. To view step by step instructions on how to reset the password, click [here](#).

### **Changing a Password**

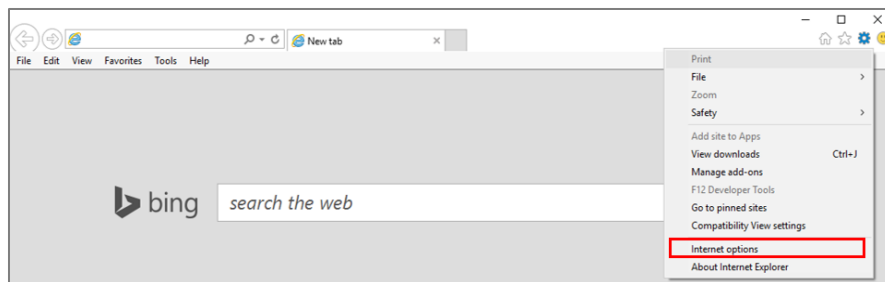
If you wish to change your password, you may do so. To view step by step instructions on how to change your password, click [here](#).

## Disable Pop-Up Blocker in Internet Explorer

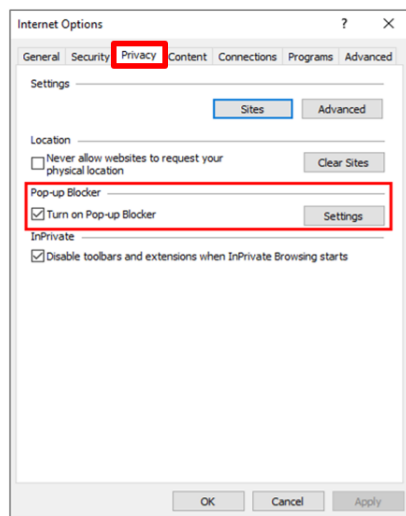
1. Open Internet Explorer and click on the **Gear icon**  in the top right corner of your browser screen.



2. From the menu, select **Internet Options**.



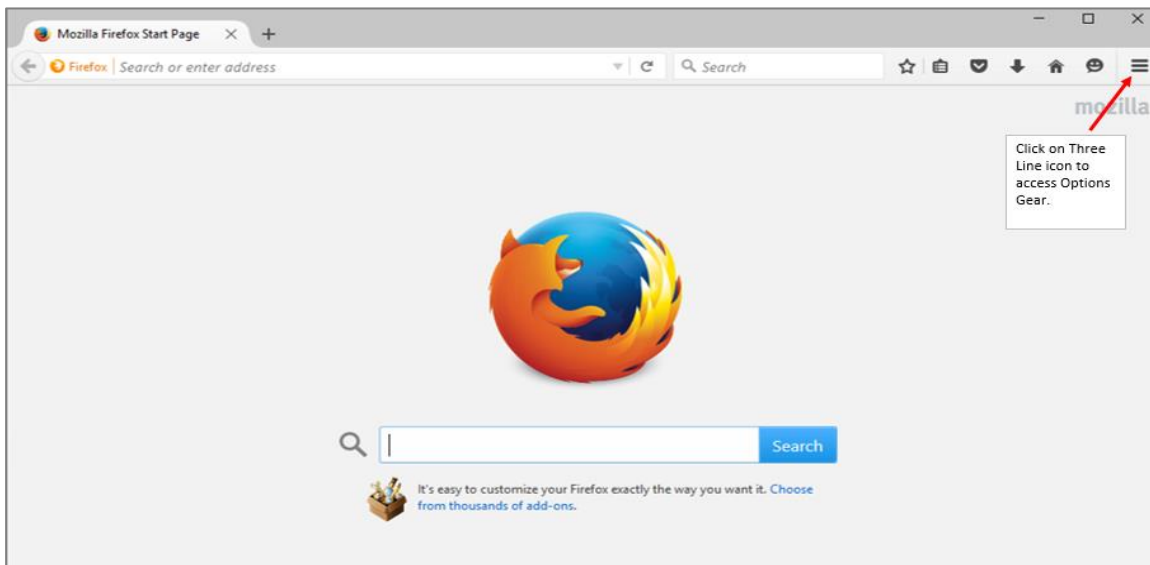
3. Select the **Privacy Tab** and uncheck "Turn on Pop-up Blocker" in the Pop-up Blocker section. To save your changes, click **Apply**, then click **OK**.



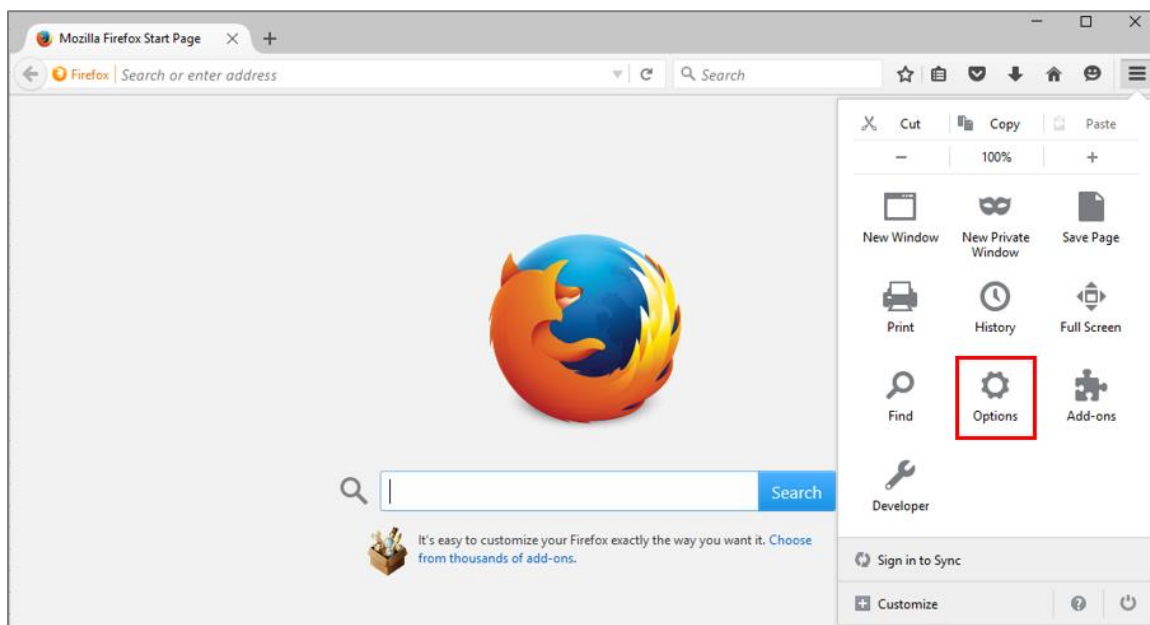
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## Disable Pop-Up Blocker in Firefox

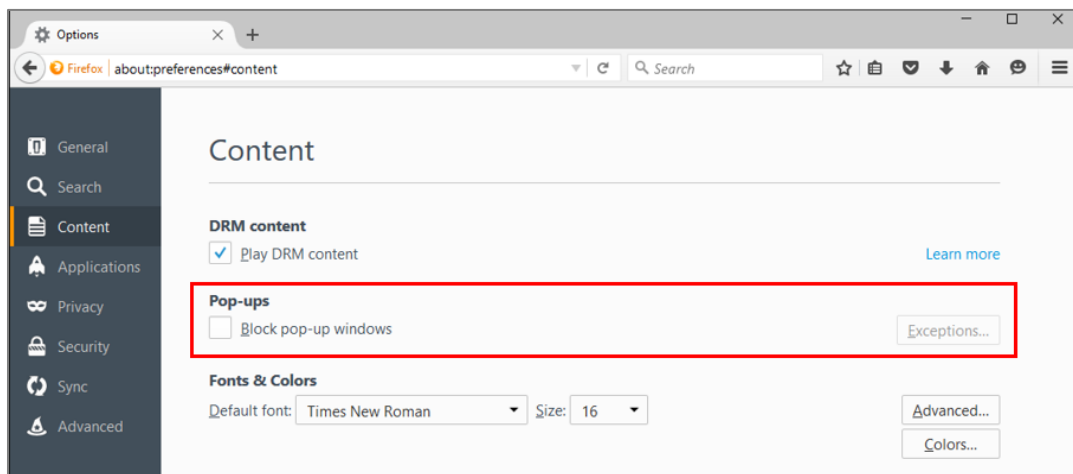
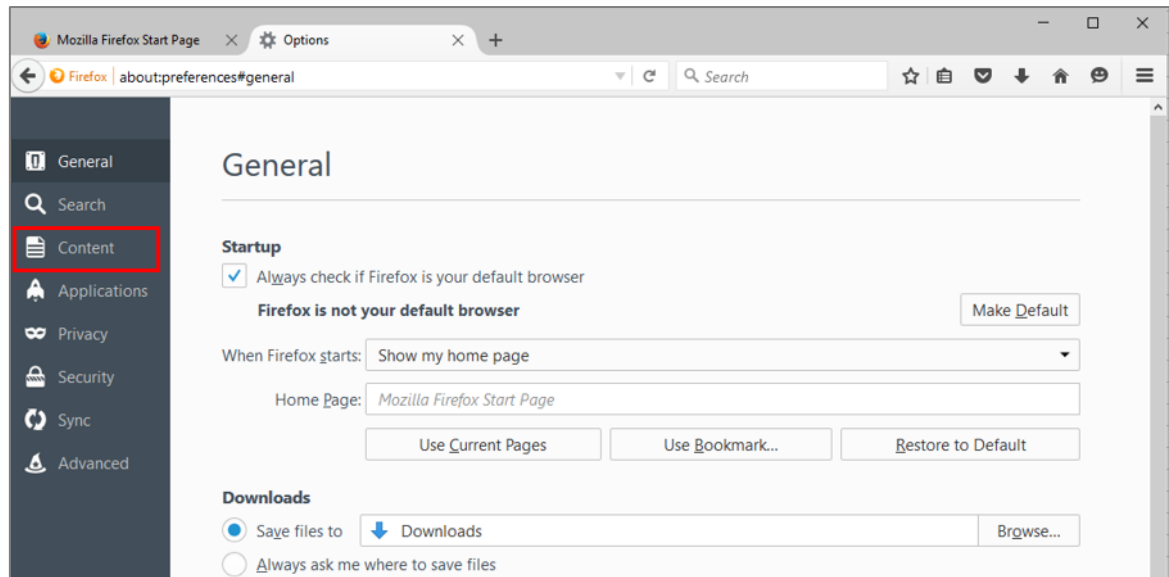
1. Open Firefox and click on the **Three Line** icon in the top right corner of the browser window to access the menu.



2. From the menu, click **Options**.



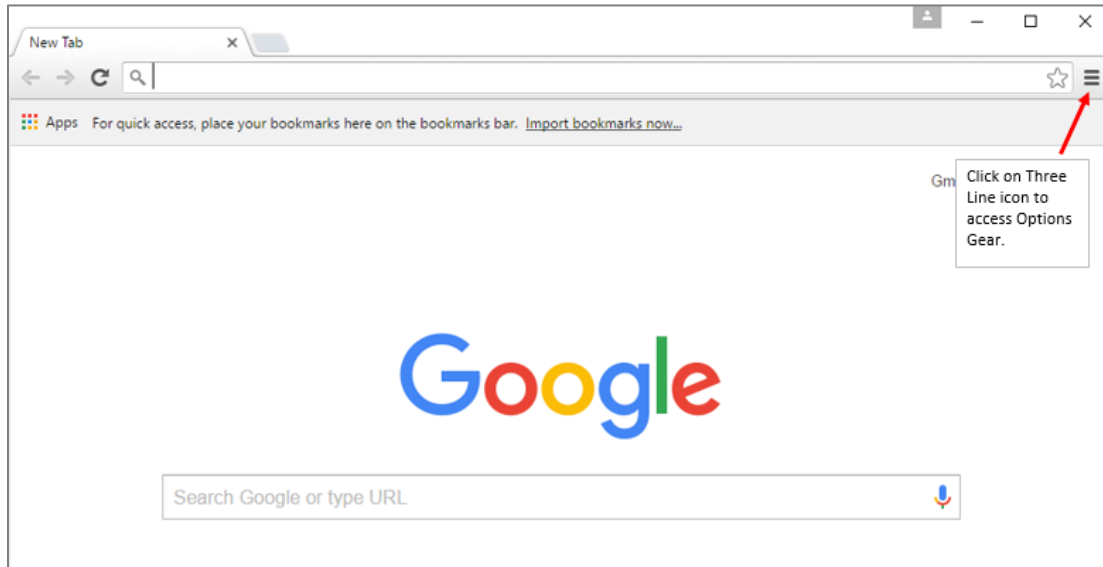
3. In the menu on the left, click **Content**.



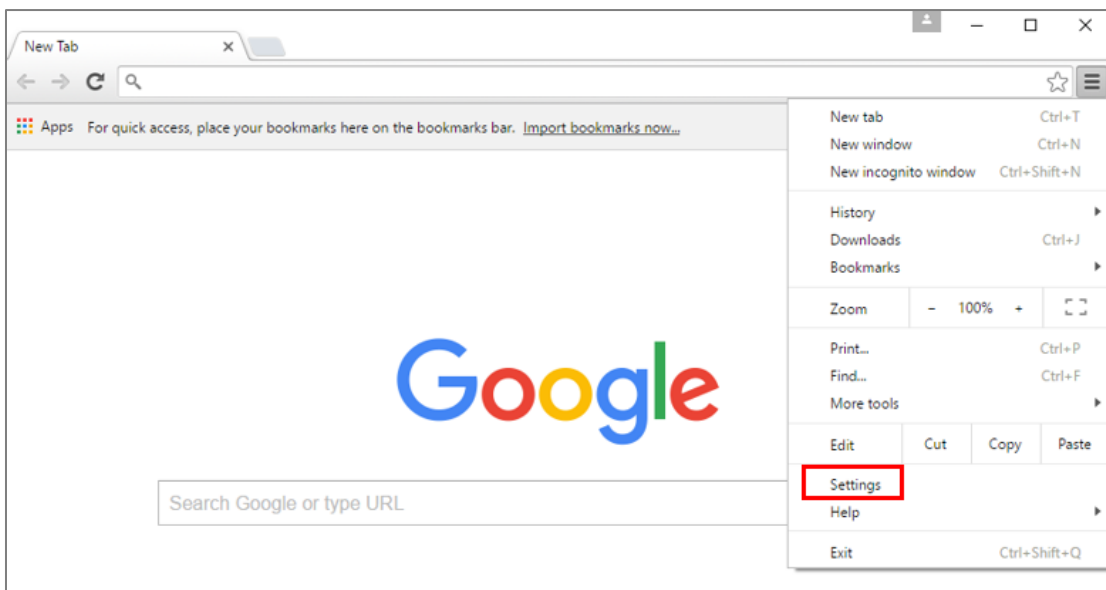
4. Uncheck “**Block pop-up windows**”.

## Disable Pop-Up Blocker in Chrome

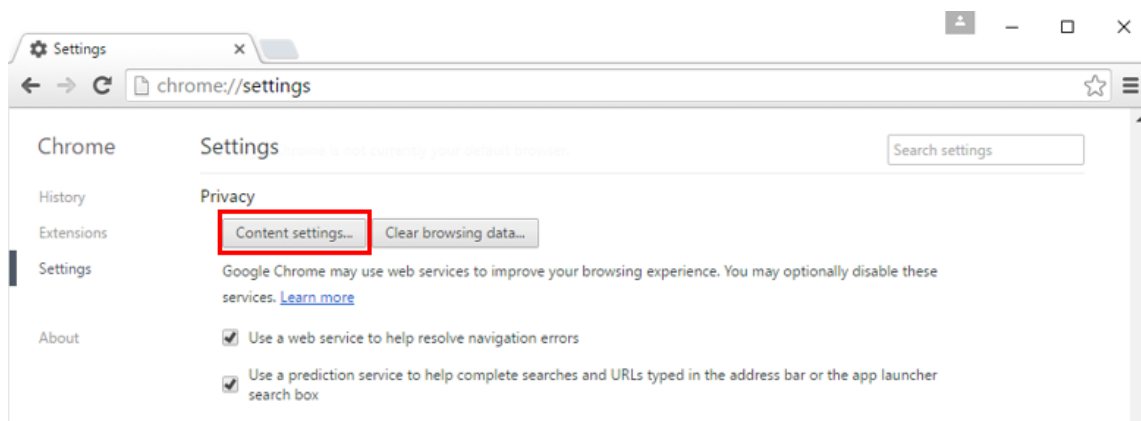
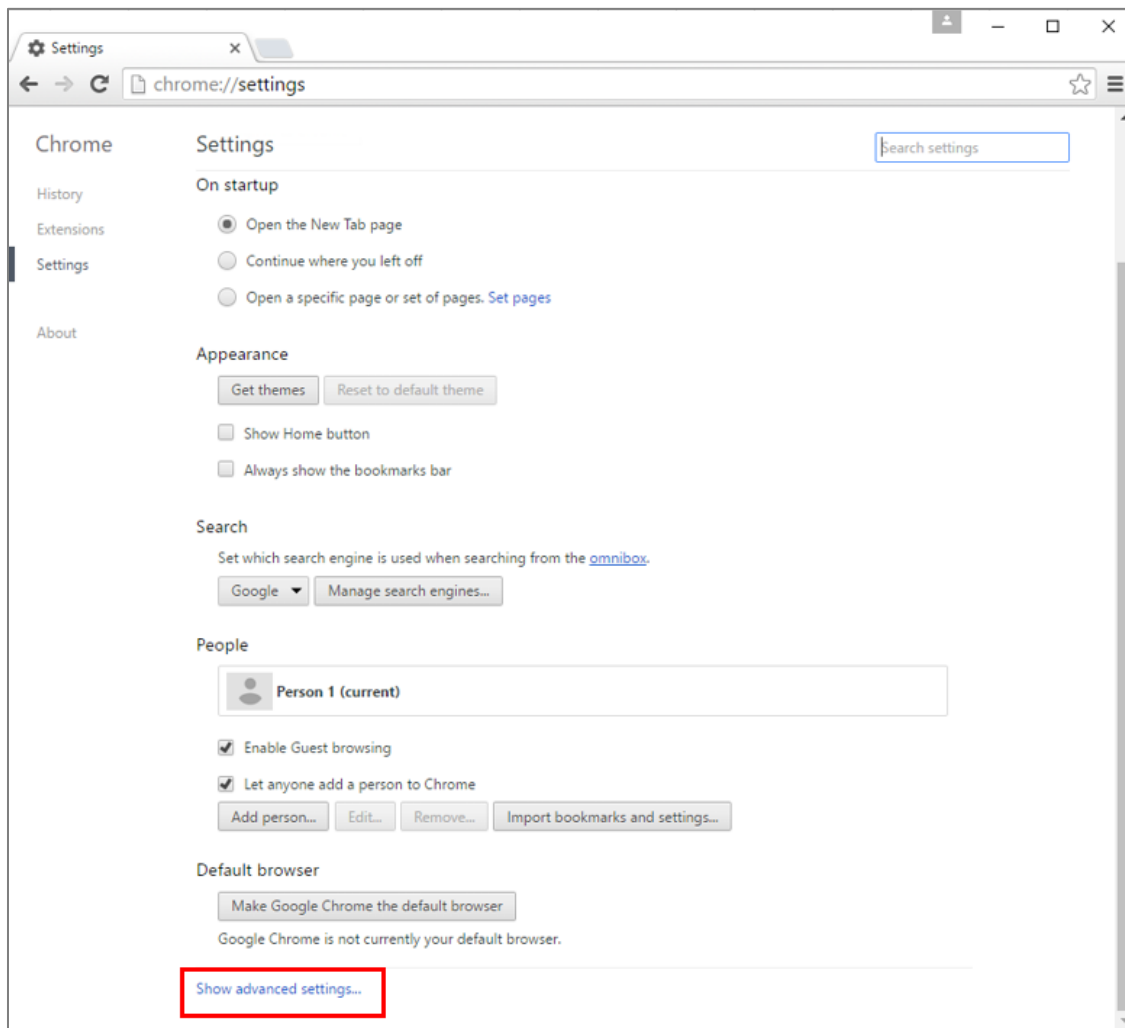
1. Open Chrome and click on the **Three Line** icon in the top right corner of the browser window to access the menu.



2. Click **Settings**.

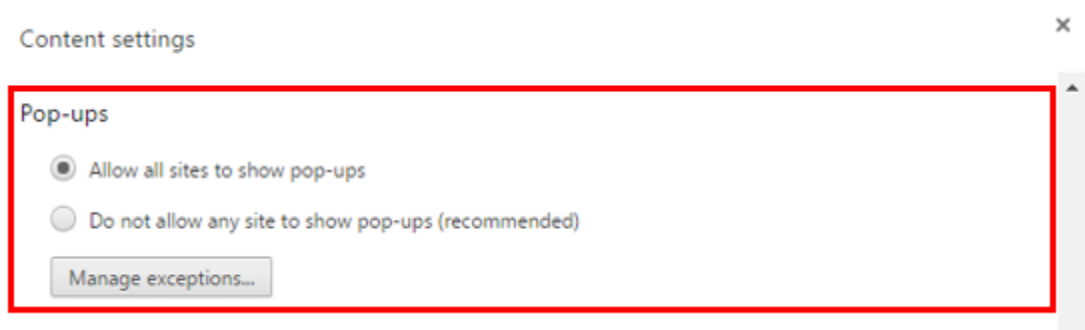


3. Scroll down the Settings page and click “**Show advanced settings**”.



4. In the Privacy section, click **Content Settings**.

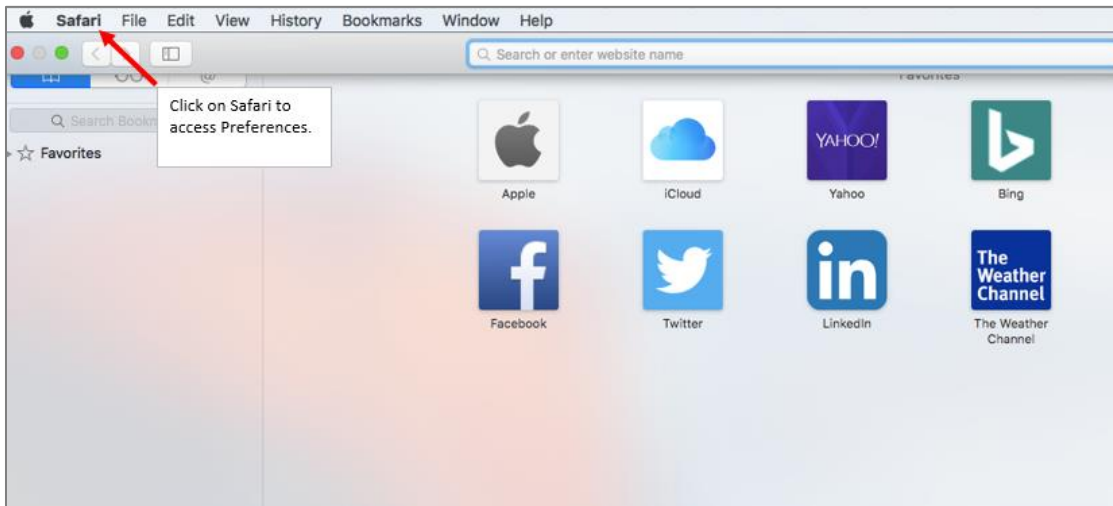
5. Select “**Allow all sites to show pop-ups**” and click **Done** to save changes.



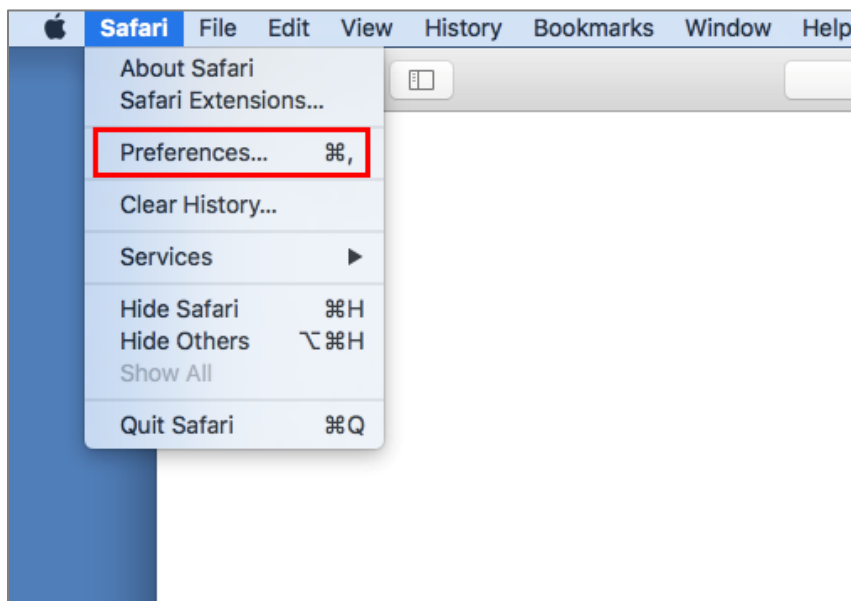
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## Disable Pop-Up Blocker in Safari

1. Open Safari and click on the **Safari** menu in the top left corner.

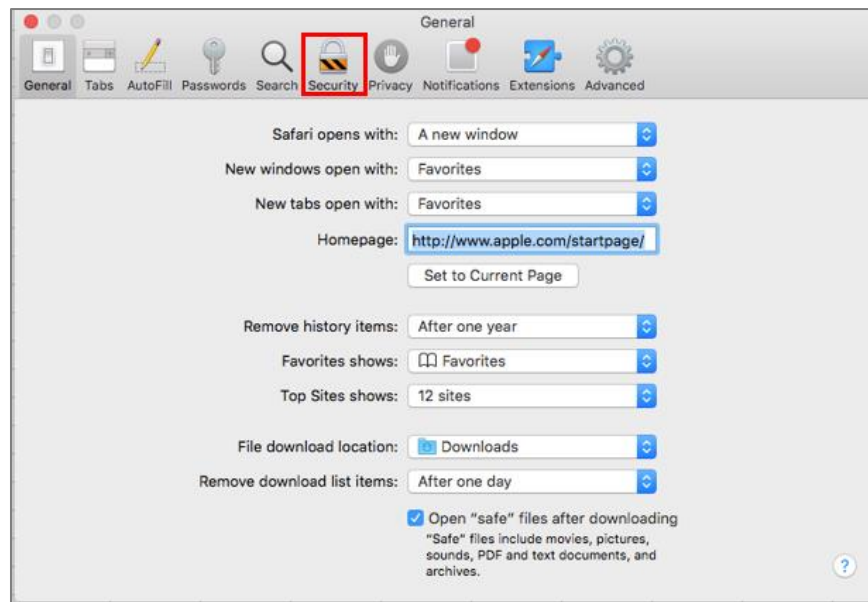


2. Select **Preferences**.

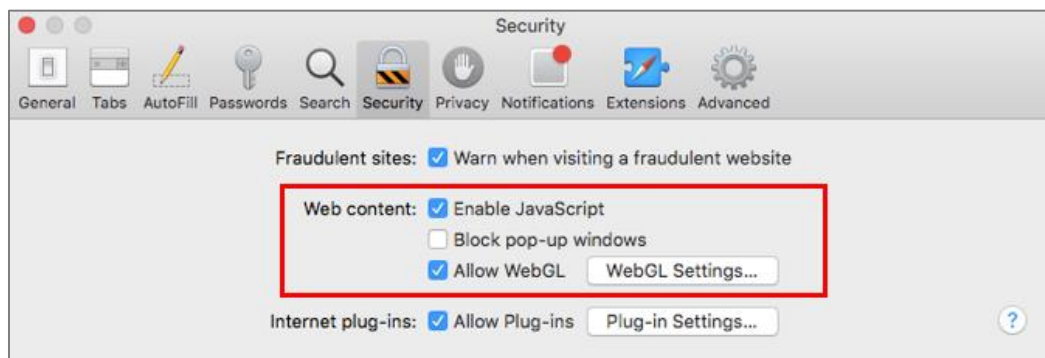




3. Click the **Security** option in the menu at the top.



4. In the Web content section, uncheck “**Block pop-up windows**”.



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## Registering For a New Account for the Family or Provider Portal

**Important – Before registering, please make sure the agency has your valid email address on file.**

1. To create a new login for the Provider Portal or Family Portal, click on the “**Register**” link below the Log in button.

2. Enter your email address and a secure password, and then click **Register**.

3. A confirmation email will be sent to provide you with further instructions.

- Once you have received the email, click on the link provided to confirm your account and continue to complete the registration request.



- You will be taken to a page where you will enter your contact information. After entering your information, click **Submit**.

Update Contact Info [\(BACK\)](#) [Log off](#)

Your login has not yet been associated with data for your case. In the meantime, you will have access to download forms only. For access to the other features, please try back later.

**Update Your Info**

Your case has not yet been associated with information in our system. Please fill out AS MUCH of the information below that you can to help us associate you with your case.

Email/Username  [Update](#)

**Contact Info**

Director Name

Doing Business As

Payee Name

Phone  Ext.

Prefer Paperless ☒

**Physical Address**

Address 1

Address 2

City

State

Zip

**Mailing Address**

Address 1

Address 2

City

State

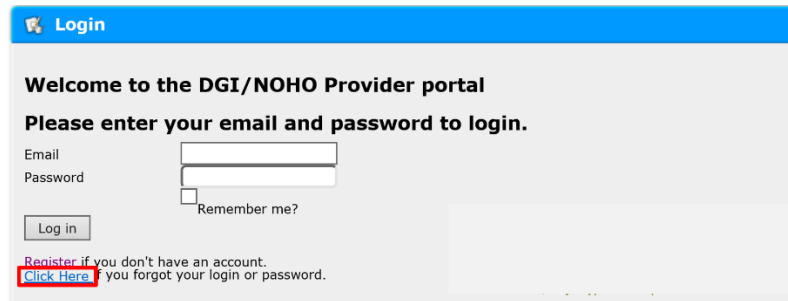
Zip

[Change Password](#)

**Note:** The registration request must be approved by the agency to have full access to the portal.

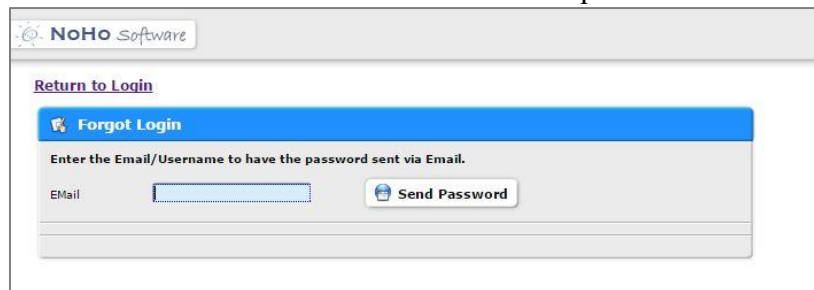
## How to Reset the Password for a Family or Provider Portal Account

1. If you forgot your password, you can reset it, using a link on the Login page. To start, click the “Click Here” link.



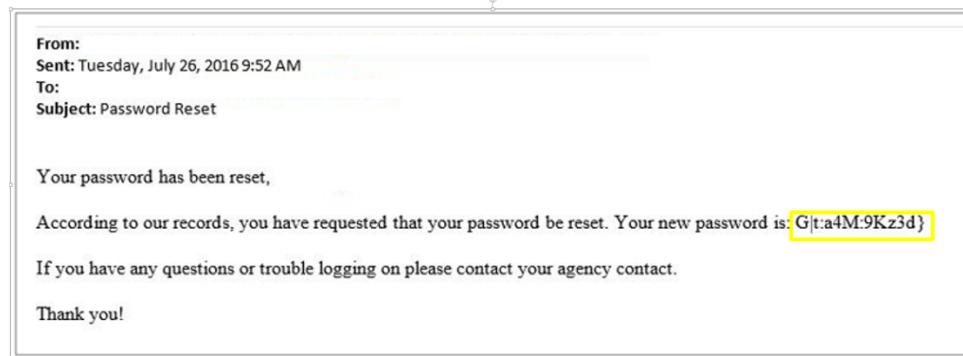
The screenshot shows the login page for the DGI/NOHO Provider portal. It has a blue header with the word "Login". Below the header, it says "Welcome to the DGI/NOHO Provider portal" and "Please enter your email and password to login." There are input fields for "Email" and "Password", and a "Remember me?" checkbox. A "Log in" button is present. Below the login fields, there are two links: "Register if you don't have an account." and "Click Here if you forgot your login or password." The "Click Here" link is highlighted with a red box.

2. Enter your email and click on “Send Password” to receive the password via email.



The screenshot shows the "Forgot Login" page on the NOHO Software portal. It has a blue header with the text "Forgot Login". Below the header, it says "Enter the Email/Username to have the password sent via Email." There is an input field for "Email" and a "Send Password" button.

3. Once you have received the email, it is best to copy the temporary password provided to avoid typos.



The screenshot shows an email received from NOHO Software. The email header includes "From:", "Sent: Tuesday, July 26, 2016 9:52 AM", "To:", and "Subject: Password Reset". The body of the email says "Your password has been reset," and "According to our records, you have requested that your password be reset. Your new password is: G[t.a4M:9Kz3d} ". The new password is highlighted with a yellow box. The email concludes with "If you have any questions or trouble logging on please contact your agency contact." and "Thank you!"

### How to copy the password for PC users:

- Click the left button on the mouse and hold it down.
- While holding the button down, drag your cursor over the text you would like to copy.
- Press Ctrl and C together or click on the right button on your mouse and select Copy.

### How to copy the password for Mac users:

- Click anywhere on your mouse and hold it down.
- While holding down the mouse button, drag the cursor over the words to copy.

- Go to the upper left of your screen to the Edit Menu. Most programs on the computer will have Copy under the Edit Menu. Click on Copy.
4. Go back to the Login page, enter the email, place the cursor in the Password and press CTRL and V at the same time to paste the temporary password.

#### Shortcut keys to copy and paste

##### Windows

- CTRL+C to copy
- CTRL+V to paste

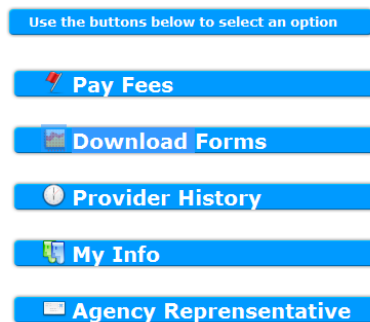
##### Mac

- ⌘+C to copy
- ⌘+V to paste

5. You will then be guided through the steps for choosing a new password.

## How to Change Your Password for the Family or Provider Portal

1. Login to the Family or Provider Portal. From the main menu, click “My Info”.



2. Click the “Change Password” link in the bottom right corner.

A screenshot of a web form titled 'Update Your Info'. At the top, a message states: 'You have a pending request! You will be able to re-edit the info below once a representative has reviewed and confirmed the pending request.' Below this is a section for 'Email/Username' with a text field and an 'Update' link. The form is divided into three sections: 'Contact Info' (Director Name, Doing Business As, Payee Name, Phone, Prefer Paperless), 'Physical Address' (Address 1, Address 2, City, State, Zip), and 'Mailing Address' (Address 1, Address 2, City, State, Zip). Each section has corresponding text input fields. In the bottom right corner, there is a red-bordered button labeled 'Change Password'.

3. Enter the current password, the new password (twice) and click “Change password” to save.

A screenshot of a web page titled 'Manage Account (BACK) Log off'. Below the title, a message states: 'Your login has not yet been associated with data for your case. In the meantime, you will have'. The main content area has a blue header with the text 'Manage Account. You're logged in as support@nohosoftware.com.' Below this is a section titled 'Change password' with three text input fields: 'Current password', 'New password', and 'Confirm new password'. At the bottom of this section is a button labeled 'Change password'.

Please remember to contact your agency if you have additional questions.