# Provider & Family Portals Helpful Tips

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/readermain.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
- <u>Firefox</u>
- <u>Chrome</u>
- <u>Safari</u>

## **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 <u>here</u>.

#### **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 <u>here</u>.

#### **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 <u>here</u>.

#### Portal User Guide

If you need more information on how to use the Portal, you may have a Portal User Guide available in the Downloading Forms menu.

### **Additional Questions?**

If you have additional questions, please contact your agency.

# **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**.

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File Edit View Favorites Tools Help			Print		
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	earch the web		Go to pinned sites		
			Compatibility View settings		
			Internet options		
			About Internet Explorer		

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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General Security Privacy Content C	Connections	Programs	Advi	anced
Settings				
[	Sites	Adv	vanced	
Location				
Never allow websites to request your physical location	r	Cle	ar Site:	s
Pop-up Blocker				_
Turn on Pop-up Blocker		Se	ttings	
Infrivate	n InPrivate Br	owsing sta	rts	
Infrivate — Disable toolbars and extensions when	n InPrivate Br	owsing sta	irts	

# **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**.

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Ç	Sync	Home <u>r</u> age.	Mozula Filejox Start Page					
٤	Advanced		Use <u>C</u> urrent Pages	Use <u>B</u> ookmark	<u>R</u> estore to D	Default		
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4. Uncheck "Block pop-up windows".

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Firefox about:pr	references#content 🔻 🖉 🗍 🔍 Search	☆自	<b>⊽ ∔ </b>	ø	≡
<ul> <li>General</li> <li>Search</li> <li>Content</li> <li>Applications</li> </ul>	Content          DRM content         V       Play DRM content		Learn mo	re	
<ul> <li>➡ Privacy</li> <li>➡ Security</li> <li>▲ Supe</li> </ul>	Pop-ups Block pop-up windows Fonts & Colors	[	Exceptions		
Advanced	Default font: Times New Roman ▼ Size: 16 ▼		Advanced		

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## **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".

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to Settings				~	-
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Chrome	Settings	arch setti	ngs		
History	On startup				
Extensions	Open the New Tab page				
Settings	Continue where you left off				
-	Open a specific page or set of pages. Set pages				
About	Appearance          Get themes       Reset to default theme         Show Home button       Always show the bookmarks bar         Search       Set which search engine is used when searching from the <u>omnibox</u> .         Google       Manage search engines         People       Person 1 (current)				
	<ul> <li>Enable Guest browsing</li> <li>Let anyone add a person to Chrome</li> <li>Add person Edit Remove Import bookmarks and settings</li> <li>Default browser</li> <li>Make Google Chrome the default browser</li> <li>Google Chrome is not currently your default browser.</li> <li>Show advanced settings</li> </ul>				4

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



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

Content settings	×
Pop-ups	<b>^</b>
<ul> <li>Allow all sites to show pop-ups</li> </ul>	
<ul> <li>Do not allow any site to show pop-ups (recommended)</li> </ul>	
Manage exceptions	

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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.

Ú	Safari File	Edit View	History	Bookmarks	Window	Help
	About Safari Safari Extensi	ions				
	Preferences	. ¥,				
	Clear History.					
	Services	►				
	Hide Safari Hide Others Show All	田光 日第ブ				
	Quit Safari	жQ				

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

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General Tabs AutoFill Passwords Search Security Privac	y Notifications Extensions Advanced	
Safari opens with:	A new window	
New windows open with:	Favorites	
New tabs open with:	Favorites 😒	
Homepage:	http://www.apple.com/startpage/	
	Set to Current Page	
Remove history items:	After one year	
Favorites shows:	D Favorites	
Top Sites shows:	12 sites	
File download location:	Downloads	
Remove download list items:	After one day	
	Open "safe" files after downloading	
	"Safe" files include movies, pictures, sounds, PDF and text documents, and archives.	?

4. In the Web content section, uncheck "Block pop-up windows".

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General	Tabs	AutoFill	Passwords	Search	Security	Privacy	Notification	s Extensions	Advanced	
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						Bloc	k pop-up w	indows		
						🗹 Allov	v WebGL	WebGL S	ettings	
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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.

🕵 Login	
Welcome to the	e DGI/NOHO Provider portal
Please enter yo	our email and password to login.
Email	
Password	
Log in	Remember me?
Register if you don't h Click Here if you forgo	ave an account. t your login or password.

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

W Register	
Use the form l	below to create a new account.
Passwords are required @&!#*).	to have a minimum of 7 characters including at least one non-alphanumeric character (such a
A valid email address m	ust be on file prior to registration.
Email address Password Confirm password	
Register	

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

Welcome to the DGI/NOHO	Provider portal
A confirmation email has entered for registration. I email to confirm your reg	been sent to the email address you Please follow the instructions in your istration.
Please enter your email an	d password to login.
Email	
Password	
Log in	

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



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

Update Contact Info <u>(B</u>	BACK) Log off	
Your login has not yet	been accepted with data for your case. In the meantime, you will have	a accord to download forms only. For accord to the other features, please try back later
rour login has not yet i	been associated with data for your case. In the meantaine, you will have	e access to download forms only. For access to the other reatures, please by back later.
🖣 Update Your Inf	ío	
Normal Street and the	an anna iste durité information in anna start places fill out an suich affair	
information below that y	ou 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		
Submit	Change Password	

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

🕵 Login	
Welcome	to the DGI/NOHO Provider portal
Please en	ter your email and password to login.
Email	
Password	Remember me?
Log in	
Register if you o Click Here f you	don't have an account. I forgot your login or password.

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

~			
& Forg	or Login		
inter the	Email/Username to have the passw	vord sent via Email.	
Mail		😁 Send Password	

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

From:
Sent: Tuesday, July 26, 2016 9:52 AM
To:
Subject: Password Reset
Your password has been reset,
According to our records, you have requested that your password be reset. Your new password is: G t:a4M:9Kz3d}
If you have any questions or trouble logging on please contact your agency contact.
Thank you!

#### How to copy the password for a 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 a 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.

Please enter your email and password to login.	
Email	
Password	
Remember me?	
Log in	

Shortcut keys to copy	and paste
<ul> <li><u>Windows</u></li> <li>CTRL+C to copy</li> <li>CTRL+V to paste</li> </ul>	<u>Mac</u> 。

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.

You have a pending req and confirmed the pend	uest! You will be able to re-edit the info below once a re ding request.	epresentative has reviewed
Email/Username		Update
Contact Info Director Name	Pertal User	
Doing Business As	The Davis Center	
Payee Name	The Davis Center	
Phone	355-355-3555	
Prefer Paperless		
Physical Address Address 1	123 Test Way	
Address 2		
City	Tarzana	
State	CA	
Zip	91356	
Mailing Address		
Address 1	123 Test Way	
Address 2		
City	Tarzana	
State	CA	
Zip	91356	

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

lanage Account	BACK) Log off	
our login has no	yet been associated with data for you	ir case. In the meantime, you will have
Manage Acco You're logged in as g Change password	nt. upport@nohosoftware.com.	
Current password		
New password		
	d	
Confirm new passwo		
Confirm new passwo		

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