



# Agency Portal Instructions

Cash Assistance (TANF), Food Stamps (SNAP), Health Coverage

Agencies working with clients receiving public assistance through the Indiana Family and Social Services Administration's (FSSA) Division of Family Resources (DFR) often need to know whether a client has been approved for benefits. Once authorized, registered agencies may access the Agency Portal 24/7 to check the case status for each of the individuals they support.

## Access to case status information makes managing benefits much more accurate and timely. With the Agency Portal you can:

- Print forms including Proof of Eligibility and bar-coded cover sheets to be used for submitting beneficiary information to the State
- Review case documents received and solicited document requests
- Check upcoming eligibility and IMPACT appointments
- View detailed case information including effective dates and monthly benefit amounts

## Frequently Asked Questions

### Q: How is the Agency Portal different than the Benefits Portal?

**A:** The information provided through the Agency Portal and the Benefits Portal is the same. Agencies still have access to approved, pending or denied status, benefit amount(s), redetermination months, solicited documents and due dates; however, agencies registered to use the Agency Portal have access to all cases associated with the agency. The Benefits Portal is to be used by beneficiaries to manage and stay current on their case.

### Q: What is a Registered Agency?

**A:** A Social Service Agency or Service Provider, such as hospitals and nursing homes, that register with the Indiana Family and Social Services Administration (FSSA) to access client case status via the Agency Portal.

### Q: How is being a Registered Agency different than being an Authorized Representative?

**A:** Agencies working *with* clients to follow up on case status, rather than *on behalf* of clients, should become a Registered Agency. As a Registered Agency, an Authorized Representative Form is **NOT** required to be on file for each agency staff member inquiring about a client's case status; rather, the agency as a whole is approved to receive client case status.

### Q: Why does my agency need to register with FSSA?

**A:** In order for agencies to view client case status online, agencies need to register with FSSA. The registration process allows FSSA to give your agency access to case status without having an Authorized Representative form on file for each client.

# Registered Agency and Agency Portal Instructions

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**Q: Does each staff member have to register with FSSA?**

**A:** No. Your agency will select a Primary User to register the agency and serve as the point of contact. The Primary User will be able to add and remove agency staff as users, as well as reset passwords for agency staff.

**Q: What are the password rules?**

**A:** You cannot share passwords with other users. Your password must meet minimum security requirements enforced by the portal. Your password will expire after 60 days if you do not change it and will require a reset. You can reset your password through the portal or have a primary user reset it for you.

**Q: How will FSSA know who my clients are?**

**A:** Once your agency registers with FSSA, you may begin requesting access to cases through the Agency Portal. Each client needs to give you permission to view his/her case by signing the Authorization for Release of Case Status Information Form.

# Registered Agency and Agency Portal Instructions

(Continued)

## Instructions for the Registered Agency Portal

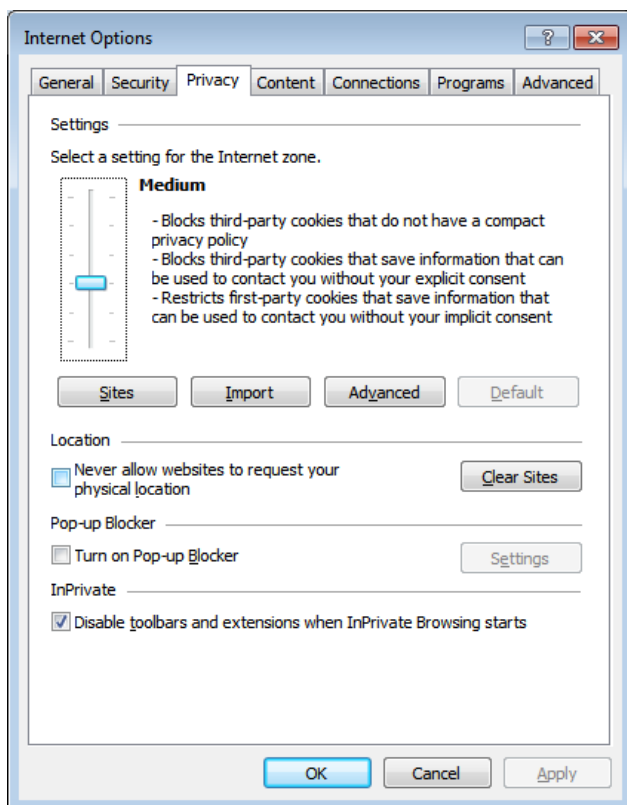
### Step 1: Disable Your Pop-up Blocker for the Agency Portal Website

#### For Internet Explorer Users:

If you do not use Internet Explorer, work with your computer support staff to disable the pop-up blocker on your web browser.

Open Internet Explorer.

- Select “Tools” from the menu bar at the top of the screen.
- Select the “Privacy” tab
- Uncheck “Turn on Pop-up Blocker” (pictured below).



# Registered Agency and Agency Portal Instructions

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## Step 2: Register Your Agency

Go To: <https://www.fssabenefits.in.gov/AgencyPortal/>

On the Registered Agency Portal Log In page, click the “Register Agency” button. This page will allow Primary Users to initially register and all users to log in to the Registered Agency portal.

The screenshot displays the Agency Portal interface. At the top, there is a green header with the "Agency Portal" title and the FSSA logo. Below the header, the "Message Board" section shows a welcome message dated Mar 1, 2016, with a scrollable text area. To the right, the "Log In" section contains input fields for "User ID" and "Password", a blue "Log In" button, and a "Forgot Password?" link. Below the login section, the "Registration" section features a light blue box with instructions and a blue "Register Agency" button. The footer of the page reads "© FSSA - Agency Portal 2016 V 1.0".

After clicking the “Register Agency” button, you will be taken to the [Agency Information](#) page.

# Registered Agency and Agency Portal Instructions

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On the Agency Information page:

- Enter your agency name
- Enter agency telephone number
- Enter agency mailing address
- Enter agency City
- Enter agency State
- Enter agency zip code
- Click the “Continue” button

The screenshot shows a web browser window with the URL <https://apdc.dev.fssa.in.gov>. The page title is "Agency Portal" and the sub-header is "Register Agency - Agency Information". The FSSA logo is visible in the top left corner. A warning message states: "If you close the browser before completing registration, you must begin the registration process again. All Fields with an (\*) are required." The "Agency Information" section contains the following fields:

- Agency Name \*
- Agency Phone\* (with separate fields for area code and extension, labeled "Ext")
- Address Line 1\*
- Address Line 2
- City\*
- State\* (with a dropdown menu currently showing "Indiana")
- Zip\*

At the bottom of the form are "Exit" and "Continue" buttons. The footer of the page reads "© FSSA - Agency Portal 2016 V 1.0".

After clicking the “Continue” button, you will be taken to the Primary User Information page.

# Registered Agency and Agency Portal Instructions

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## Step 3: Register Your Primary User

- Enter first name of primary user for agency.
- Enter last name of primary user for agency.
- Enter the 10-digit telephone number of the primary user for agency.
- Enter telephone extension, if applicable.
- Enter email address for primary user for agency.
- Re-enter email address for primary user for agency.
- Password – Create your password following the below rules.

**Password Must:**

At Least 1 lowercase letter  
At least 1 uppercase letter  
At least 1 special character  
At least 1 Number  
Length between 8 and 32 characters  
Allowed special characters:  
Question mark (?), pound sign (#), at sign (@), underscore (\_), equal sign (=), dollar sign (\$), colon (:), and dash (-)

- Re-enter your password to confirm.
- Click the “Continue” button.

The screenshot shows a web browser window with the URL <https://apdc.d...> and the page title "Agency Portal Home". The page header includes the FSA logo and the text "Agency Portal". The main heading is "Register Agency - Primary User Information". Below this, a note states "All Fields with an (\*) are required." The form contains the following fields:

- First Name \*
- Last Name \*
- Phone Number \* (with an "Ext." field for extension)
- Primary User Email Address \* (with a note: "Your Email address is the User ID that will be used to log in to the portal.")
- Confirm Email Address \*
- Password\*
- Confirm Password\*

A password requirements box is visible on the right side of the form, containing the same text as the one in the previous block. At the bottom of the form are three buttons: "Exit", "Back", and "Continue". The footer of the page reads "© FSSA - Agency Portal 2016 V 1.0".

# Registered Agency and Agency Portal Instructions

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## Step 4: Security Questions

- You must choose 5 security questions to be used in the event you need to reset your password.
- Click on each box to choose a question for which the answer will be easy to remember. Enter your answer in the “Answer” field.
- Each answer must be at least 3 characters long. You must type the answer exactly the same way if you need to reset your password.
- Answers are case sensitive.
- All fields with an asterisk \* are required.
- After you have successfully completed all 5 of the security questions, click the “Continue” button.

The screenshot shows a web browser window with the URL <https://apdc.d...> and a tab titled "Agency Portal Home". The page header features the FSA logo and the text "Agency Portal" and "Security Questions". Below the header, there is a paragraph of instructions: "You must choose 5 security questions to be used in the event you need to reset your password. Click on each box to choose a question for which the answer will be easy to remember. Put the answer in the Answer field. Each answer must be at least 3 characters long. You must type the answer exactly the same way if you need to reset your password. Answers are case sensitive." Below this, a note states "All Fields with an (\*) are required." The main content area is titled "Security Questions" and contains five rows, each with a "Security Question" dropdown menu and an "Answer" text input field. At the bottom of the form, there are three buttons: "Exit", "Back", and "Continue". The footer of the page contains the text "© FSSA - Agency Portal 2016 V 1.0".

# Registered Agency and Agency Portal Instructions

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## Step 5: New Agency Summary Page

This page displays the agency and primary contact information provided by the user and allows the user to verify that the information entered is correct. If not, click the “Edit” button to correct the information. Once the Agency Account Summary and the Primary User Summary have been verified, click the “Confirm” button.

**Agency Portal**  
New Agency Summary

Please take time to check your Agency Information. This information will be verified. If you need to correct the information, please click *Edit*. If your information is correct, click *Confirm* to continue.

Agency Information Summary	
Agency Name	MR Test Agency 49
Agency Phone	317-555-0123
Address Line 1	251 Illinois St
Address Line 2	
City	Indianapolis
State	Indiana
Zip	46204

Primary User Summary	
First Name	Lynn
Last Name	Summers
Phone Number	317-555-2424
Email Address	

[Edit](#) [Confirm](#)

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# Registered Agency and Agency Portal Instructions

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## Step 6: Terms and Conditions

This Page displays the Terms and Conditions, along with Civil Rights Compliance and Confidentiality of Client information that the User must agree to before the user account can be created.

FSSA will provide limited access to confidential client case status information. This access will be granted solely to assist the Participating Agency in their role of assisting the client with their State of Indiana public assistance benefits. By obtaining Agency Case Status Internet Portal rights, the agency will have access to the following case-specific information.

- View application status as approved or denied.
- View the value of case benefits.
- View redetermination date.
- View a list of requests for supporting documentation.
- View all scheduled interview appointments.
- View the names of all Authorized Representatives to a case.
- View and print a Proof of Eligibility Form.

Once you have read over and agreed to the terms and conditions, please check the box at the bottom of the page (I agree with the terms and conditions in this agreement). Then click the “Create Account” button.

## Step 7: Verification Code

To confirm the email address is correct and to verify the user’s identity the portal will send an email to the registrant with a verification code that must be entered to complete the process. The Verification Code Page allows the user to enter the access code sent to their email address. Once you receive this, please enter the code in the “Verification code” box and click the “Next” button.

**NOTE: DO NOT CLOSE THIS BROWSER or you will have to start the registration over. If you did not receive the email, please check your spam and junk email folders, or click New Verification Code to resend the email with your verification code. If the Verification Code does not match, please note the Verification Code is valid only for 15 Minutes. If you would like to get another Verification Code, click the “New Verification Code” button.**

Agency Portal  
Verification Code

We have sent you an Email at agencydemo@demo.com with a Verification Code. This email will come from donotreply@fssabenefits.in.gov. Please enter the Verification Code in the box below and click Next to proceed.  
All fields with an (\*) are required.

Verification Code \*  ?

Exit Next

Do not close this browser or modify the URL, or you will have to start registration over.  
Did not receive our Email? Please check your spam and junk Email folders.  
If you still can not find the Email, click [New Verification Code](#) to resend the Email with your Verification Code.

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# Registered Agency and Agency Portal Instructions

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## Step 8: Agency Registration Confirmation Page

The Agency Registration Confirmation Page provides a message telling you that an email is being sent to your email address. At this point you are registered but, do not have full access until your registration is approved. Upon approval a confirmation email will be sent to your email address, with a link to your agency home page (shown below).

The screenshot shows the 'Agency Portal' User Home page. The browser address bar displays 'https://fssabe...'. The page header includes the FSA logo and navigation links for Home, Manage, Logout, and Hi Lynn. Below the header, there are links for 'Pre-fill and Print Case Access Request Form' and 'Upload Case Access Request Form'. A search instruction states: 'Please enter the case number or the individual's name. If no search criteria is entered, the search will return all agency cases.'

**Quick Case Search**

Case Number:  ?

First Name:  ?

Middle/MI:  ?

Last Name:  ?

Suffix:  ?

Buttons:

Showing 1 to 3 of 3 entries

Action	Case Number	Name	Last 4 SSN
<a href="#">Remove</a>	<a href="#">3000654057</a>	HIP REDET	7818
<a href="#">Remove</a>	<a href="#">3000654057</a>	HIP REDET	7818
<a href="#">Remove</a>	<a href="#">3000654057</a>	HIP REDET	7818

Showing 1 to 3 of 3 entries

Previous 1 Next

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# Registered Agency and Agency Portal Instructions

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## Step 9: Adding Users

The agency primary user has the ability to add additional users.

- Select “Users” from the Manage drop down at the top of your screen.
- Click the “Add” user button.
- Enter the new users email address and select their role.
  - Agency Primary User: Can access all cases, add additional users and reset passwords.
  - Agency User: Can access all cases.
- Click the “Save” button and a user registration email will be sent to the new user.

They have 24 hours to complete registration which includes the user equivalent of Steps 3-7 above before they have access to the Agency home page. If registration is not completed in the 24 hour time span, a Primary User will be required to add the user again.

## Step 10: Manage Users

The “Primary User” has the ability to manage the other users.

Select “Users” from the manage drop down list to view all agency users.

On the manage users page, the “Primary User” will have the option to edit profiles, reset passwords, and delete users. It is the State’s expectation that the Primary User will ensure that individuals that no longer need access to the Agency Portal are deleted or disabled.

# Registered Agency and Agency Portal Instructions

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## Step 11: Request Access to a New Case

From the agency home page you will be able to view cases you have access to as well as request access to new cases. To request access to a new case click the “Pre-fill and print case access request form” link.

The screenshot shows a web browser window displaying the 'Agency Portal' for the Indiana Family & Social Services Administration (FSSA). The page title is 'Case Access Request'. Below the title, there is a brief instruction: 'Complete one or more fields below to pre-populate the applicant/recipient information on the Agency Portal Authorization for Release of Case Status Information form along with your agency information. Leave all fields blank to print a form populated with your Agency information only. Click Print to open a PDF copy of the form to print.' The form itself is titled 'Case Access Request Form' and contains several input fields: 'Applicant/Recipient Name', 'Date of Birth', 'Last 4 Digits of the Applicant's SSN', 'Phone Number', 'Applicant/Recipient Address' (with two lines), 'City', 'State' (a dropdown menu), 'Zip', and 'Public Assistance Case Number'. Each field has a small blue question mark icon to its right. At the bottom of the form are three buttons: 'Cancel', 'Reset', and 'Print'. The footer of the page reads '© FSSA - Agency Portal 2016 V 1.0'.

This Page allows you to pre-populate the Authorization for Release of Case Status Information form. You can complete any, all, or none of the fields on this page. Whatever is entered will be pre-populated on the form when it is printed. If you do not complete any of the fields, the form will only be pre-populated with the agency information. Click the “Print” button and a PDF will open in a new window pre-filled with the information you entered.

**NOTE: The client and an Agency Representative must sign the form.**

- Parent/Guardian when the client is a minor – Please write “signed by parent/guardian” below the signature.
- Case manager when the client is a ward/foster – Please write “signed forward” below the signature.

# Registered Agency and Agency Portal Instructions

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## Release Form Submission and Processing

When completed upload (see Step 12 below), fax, or mail the release form to the FSSA Document Center (the form will not be processed until received by the FSSA Document Center).

*Mail to: P.O. Box 1810, Marion, IN 46952 or FAX to 1-800-403-0864.*

**NOTE: Do not submit multiple release forms together (e.g., two case release forms in one FAX). Each release must be submitted individually.**

When the case access form without a case number is submitted, processing within five business days cannot be guaranteed. Often times, the form is submitted with new applications. The time delay results from the time it takes to establish the case number for a client's application. Access cannot be granted to the case status until the application is processed to the point where a case number is established.

Once approved, an encrypted e-mail notification is sent to the agency users, confirming access to the case.

### Step 12: Upload Case Request Form

The Case Access Form Upload page is accessed when the user clicks the "Upload Case Access Request Form" button. This allows you to upload a completed and scanned Authorization for Release of Case Status Information.

The screenshot shows the 'Agency Portal' interface. At the top left is the FSSA logo (Indiana Family & Social Services Administration). The main title is 'Agency Portal' in a green bar, with 'Case Access Form Upload Page' below it. The instructions state: 'Upload only completed and scanned Authorization for Release of Case Status Information forms. Do not put any client identification information in the document title. Only pdf, doc, docx, jpeg, jpg, tiff, or png files may be uploaded.' Below this is a section 'Please select a file to upload:' with a blue button labeled 'Choose File' and the text 'No file chosen'. At the bottom of the form area are two blue buttons: 'Upload' and 'Close'. The footer of the page reads '© FSSA - Agency Portal 2016 V 1.0'.

From here click the "Choose File" button and select the completed case status form that you have saved to your computer.

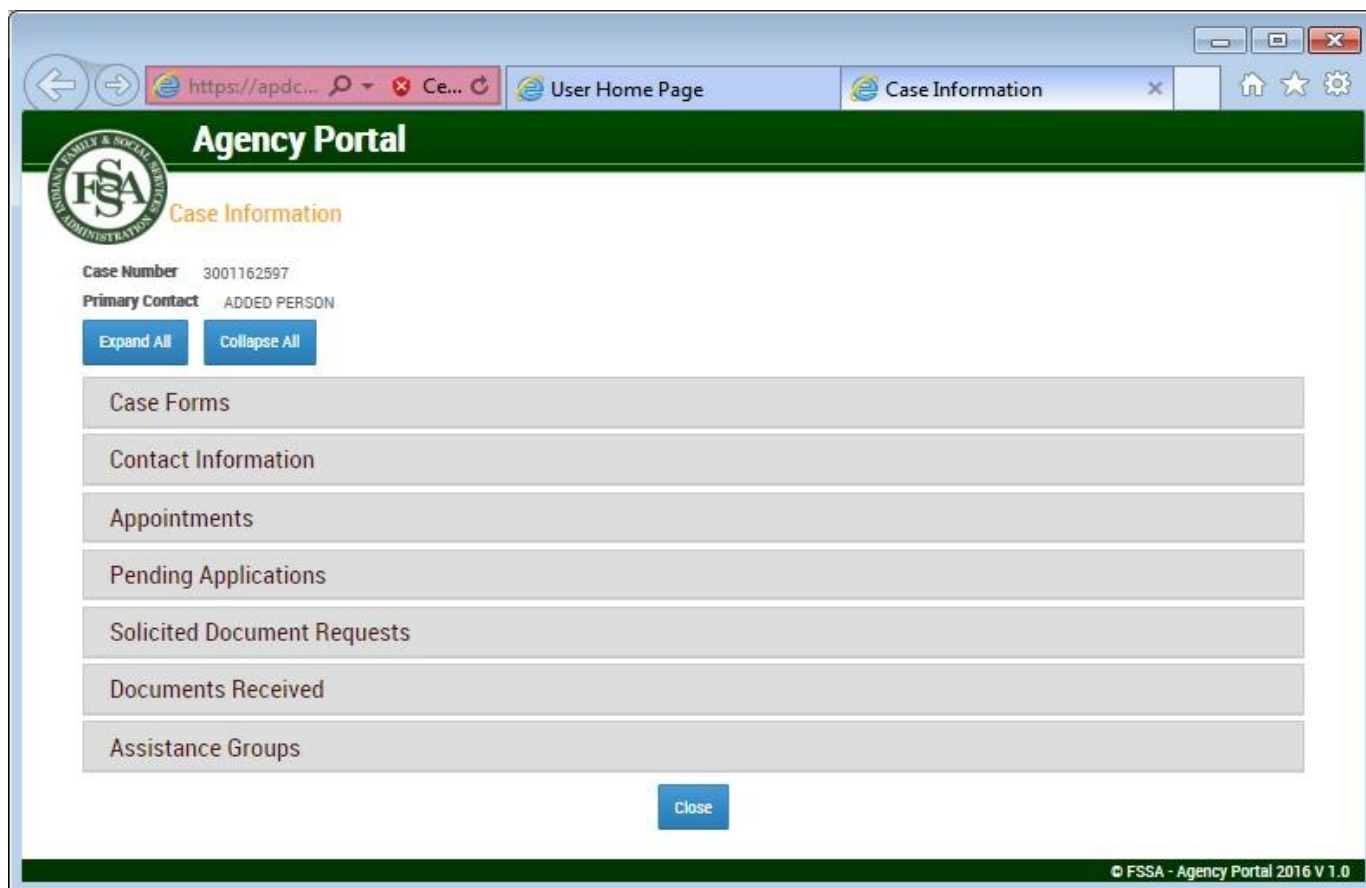
**NOTE: Do not put any client identification information in the document title. Only PDF, JPEG, JPG, TIFF, or PNG files may be uploaded.**

# Registered Agency and Agency Portal Instructions

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## Step 13: View Case Access

The Case Information screen is made up of several blocks that contain information about a specific beneficiary. The screen will open with all blocks in the 'collapsed' state. You can expand/collapse each block individually or, optionally, choose to expand/collapse all blocks at once using the buttons provided at the top of the screen (i.e., Expand All or Collapse All).



- Case Forms: Allows you to print commonly used forms.
- Contact Information: Allows you to verify contact information for the primary client on the case.
- Appointments: Displays eligibility appointments within the next 2 weeks or when no future appointments exist for the case, the most recent past appointment is displayed if it occurred in the past 2 weeks.
- Pending Applications: Displays up to the last 6 received applications.
- Solicited Document Requests: Displays a list of “pending” documents/verifications that have been requested.
- Documents Received: Displays documents received in the last 6 months.
- Assistance Groups: An Assistance Group is one or more beneficiaries that are receiving benefits in the same benefit group.

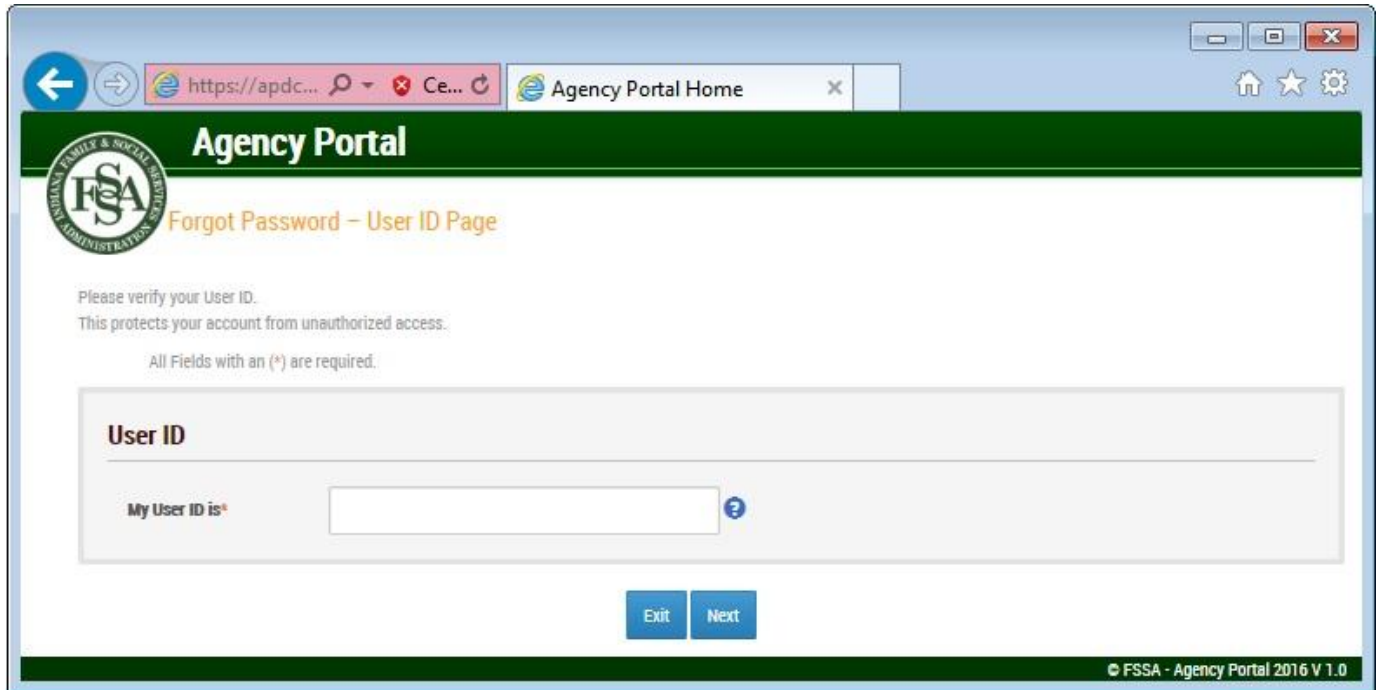
# Registered Agency and Agency Portal Instructions

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## Step 14: Change Password

If your Agency Portal password expires, you forget your password, or your account gets locked due to invalid password entry, you may reset your password as follows:

On the Registered Agency Portal page, click the “Forgot Password” button. Enter your user ID, and click the “Next” button on the Forgot Password page.

A screenshot of a web browser window showing the 'Agency Portal' website. The browser's address bar displays 'https://apdc...' and the page title is 'Agency Portal Home'. The website header features the FSA logo and the text 'Agency Portal'. Below the header, the page title is 'Forgot Password - User ID Page'. The main content area includes a message: 'Please verify your User ID. This protects your account from unauthorized access.' followed by a note: 'All Fields with an (\*) are required.' There is a large text input field labeled 'User ID' with a sub-label 'My User ID is\*' and a question mark icon. At the bottom of the form area are two buttons: 'Exit' and 'Next'. The footer of the page reads '© FSSA - Agency Portal 2016 V 1.0'.

On the next page, choose how you would like to recover your password.

- Via email: The system will send you a verification code by email to reset your password.
- Via security questions: Navigates to the security questions page, allowing you to use your security questions and answers to verify your ID.

**Welcome to Agency Portal! If you have questions please contact us at:**

**[agencyaccesshelp@fssa.IN.gov](mailto:agencyaccesshelp@fssa.IN.gov)**