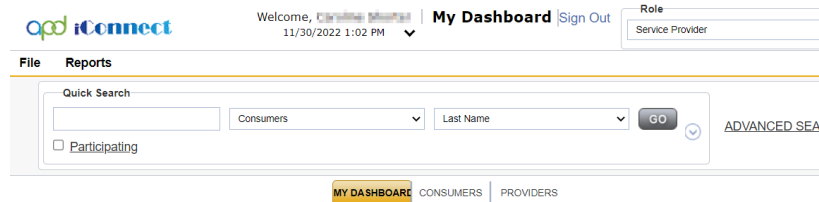## Initial Use of the Worker Portal

Introduction

This cheat sheet is to ensure that all stakeholders are aware of three key requirements to proceed with using the Worker Portal for the first time.

Establishing the Default Role

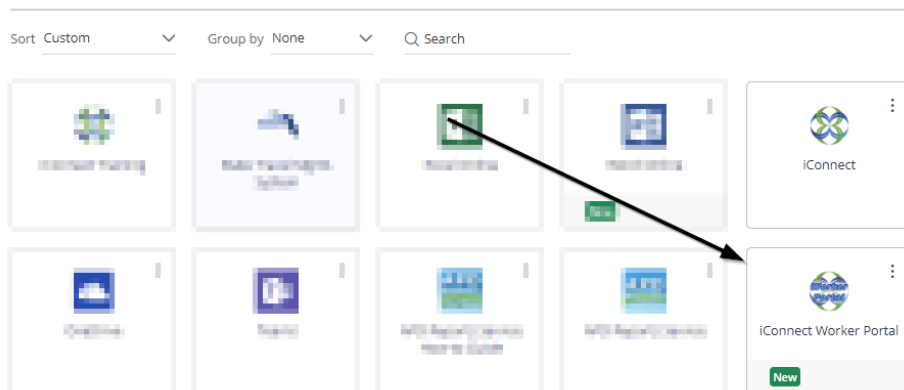1. Log into iConnect to establish your default role.

2. Once the iConnect application has been opened, the user can close iConnect and proceed with accessing the Worker Portal.
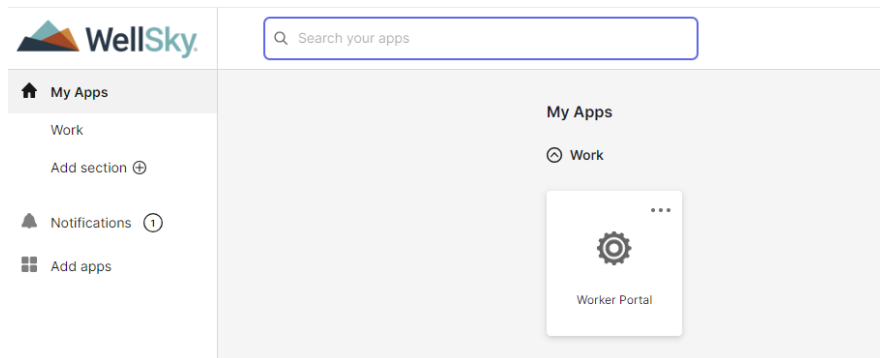
Logging in for the first time

1. Log into the Worker Portal

    a. Log into CyberArk
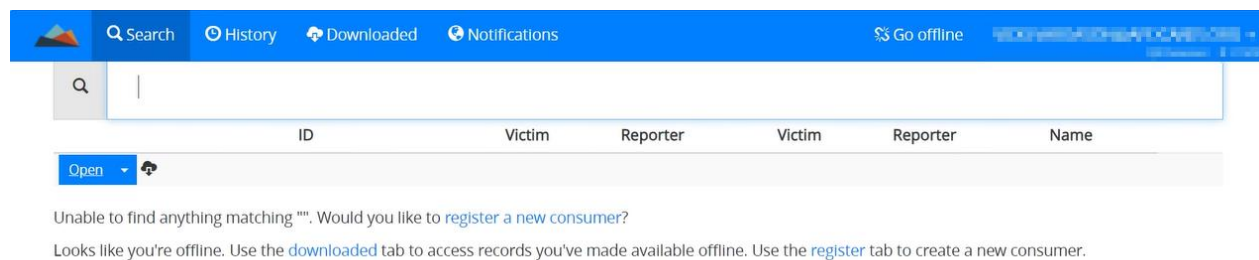
    b. Click on the iConnect Worker Portal icon

   c. Click on the Worker Portal from the Wellsky "My Apps Dashboard"

d. Upon opening the Worker Portal, you may be asked to register a new consumer.

Do not do anything or click on anything as this is not necessary to proceed with Forms.

e. Once the system completes the synchronization process, you will land on the Demographic search window, proceed with the steps outlined in the manual to complete your work.
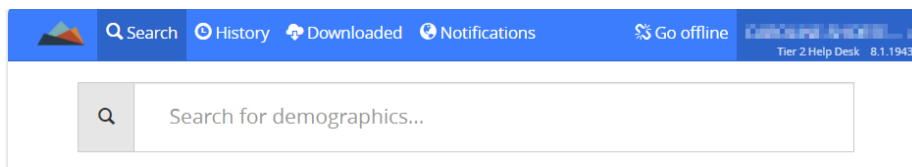
Working Offline – 48-hour idle time

1. Log into the Worker Portal, proceed with the steps outlined in the manual to download records and make everything available offline.

    a. **<u>Once you go offline, you must leave that browser window open</u>**, even if you are going somewhere without internet.

    b. This is what keeps the downloaded forms available to you without needing to be online.

    c. *Once you download the record in one browser, you cannot open that downloaded record from another. The data is retained in the browser's history.*