# SETS Provider Portal Overview

Navigation Overview

The SETS Provider Portal is where Provider Users go to complete their work. Provider Users can access many different features and records from multiple locations within the Portal.
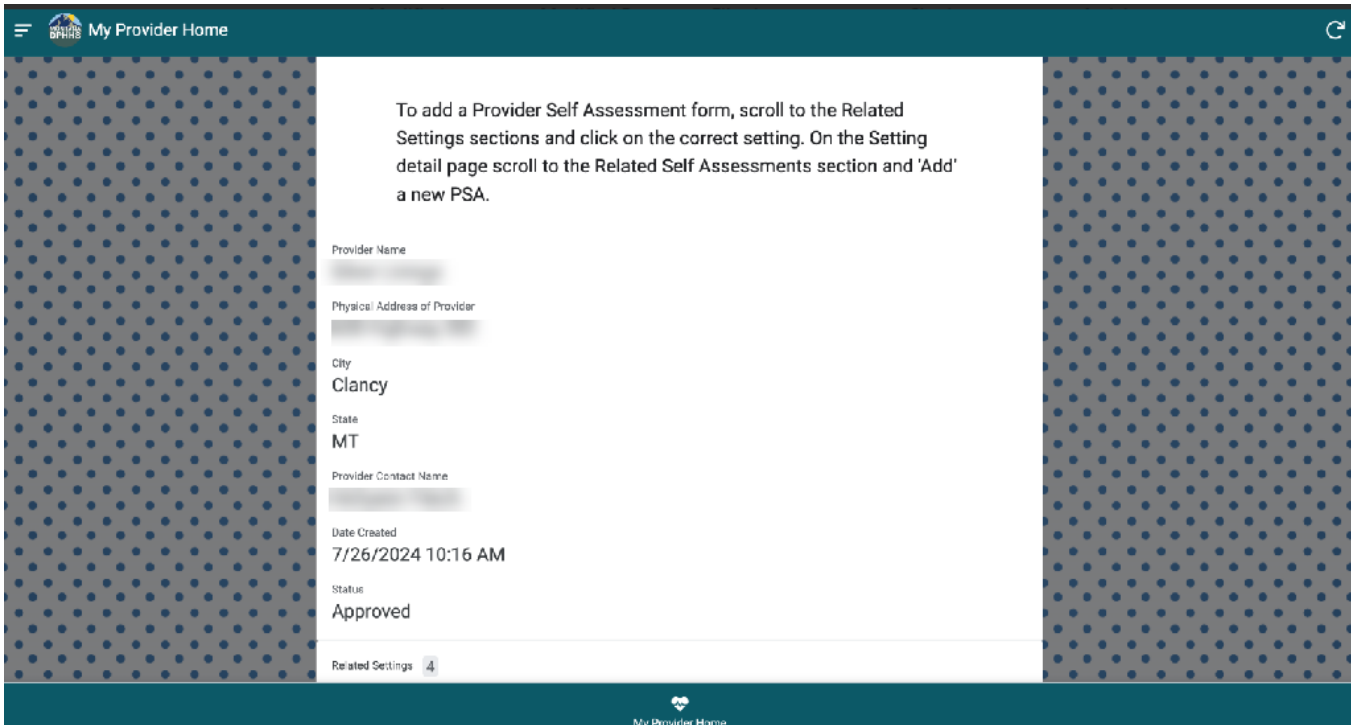
Main Menu

The Main Menu, located in the upper-left hand corner of most pages. The Main Menu is a small white icon comprised of three horizontal lines. Clicking the Main Menu icon displays the SETS Provider Portal pages, as well as the Log Out button:
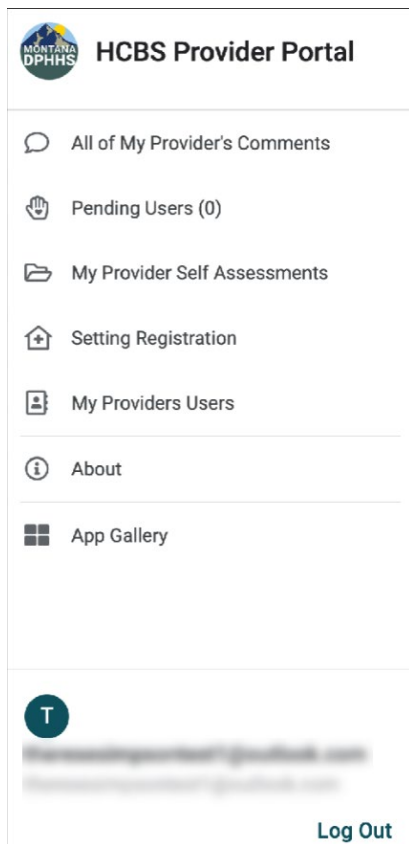

My Provider Home

My Provider Home is a small white heart icon located at the bottom middle of most pages. Clicking on My Provider Home icon displays your Provider Details, including your Related Settings. You may need to scroll down the page to view additional information.

To add a Provider Self Assessment form, scroll to the Related Settings sections and click on the correct setting. On the Setting detail page scroll to the Related Self Assessments section and 'Add' a new PSA.

Provider Name

Physical Address of Provider

City
Clancy

State
MT

Provider Contact Name

Date Created
7/26/2024 10:16 AM

Status
Approved

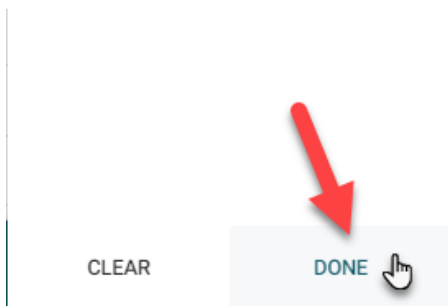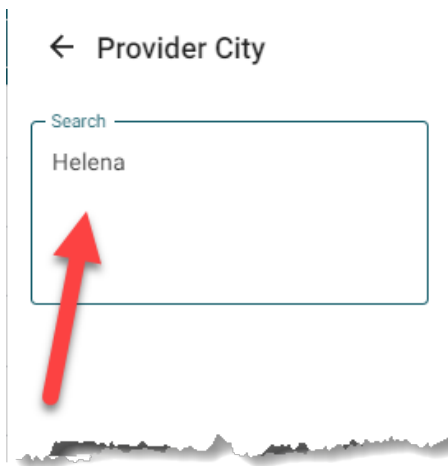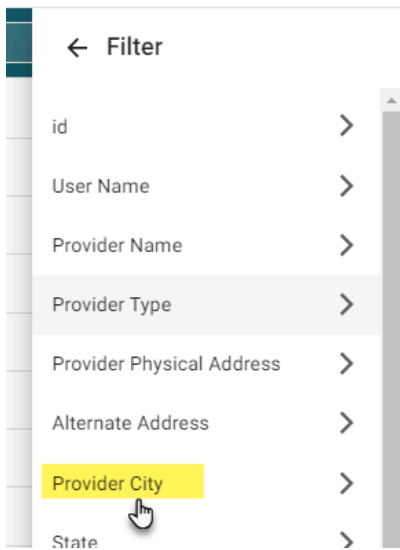Related Settings   4

Search Function

The Search function, located in the upper-right hand corner of most pages. The Search is a small white magnifying glass icon that, when clicked, opens a search text box. Entering search criteria in the search box returns records on the page that match the criteria:
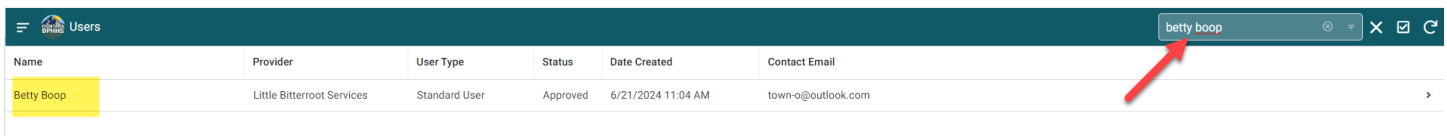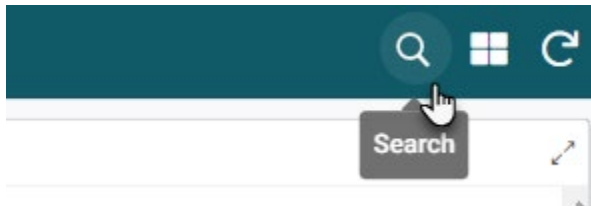
Filter Function

On some pages, the Search function doubles as a Filtering tool. If you click on the Search icon and see a small white filter arrow icon you can click it to activate the filtering function. Clicking the small white filter arrow icon displays a list of fields on which to Filter. Select a field, enter the search criteria, and click Done to see your results.

← Filter

id	>
User Name	>
Provider Name	>
Provider Type	>
Provider Physical Address	>
Alternate Address	>
Provider City	>
State	>

← Provider City

Search

Helena

CLEAR   DONE

Editing Records

Some items or records are editable* in the SETS Provider Portal. The Edit function is a small white pencil icon located in the bottom-right hand corner of applicable pages that, when clicked, opens the item or record to be edited.
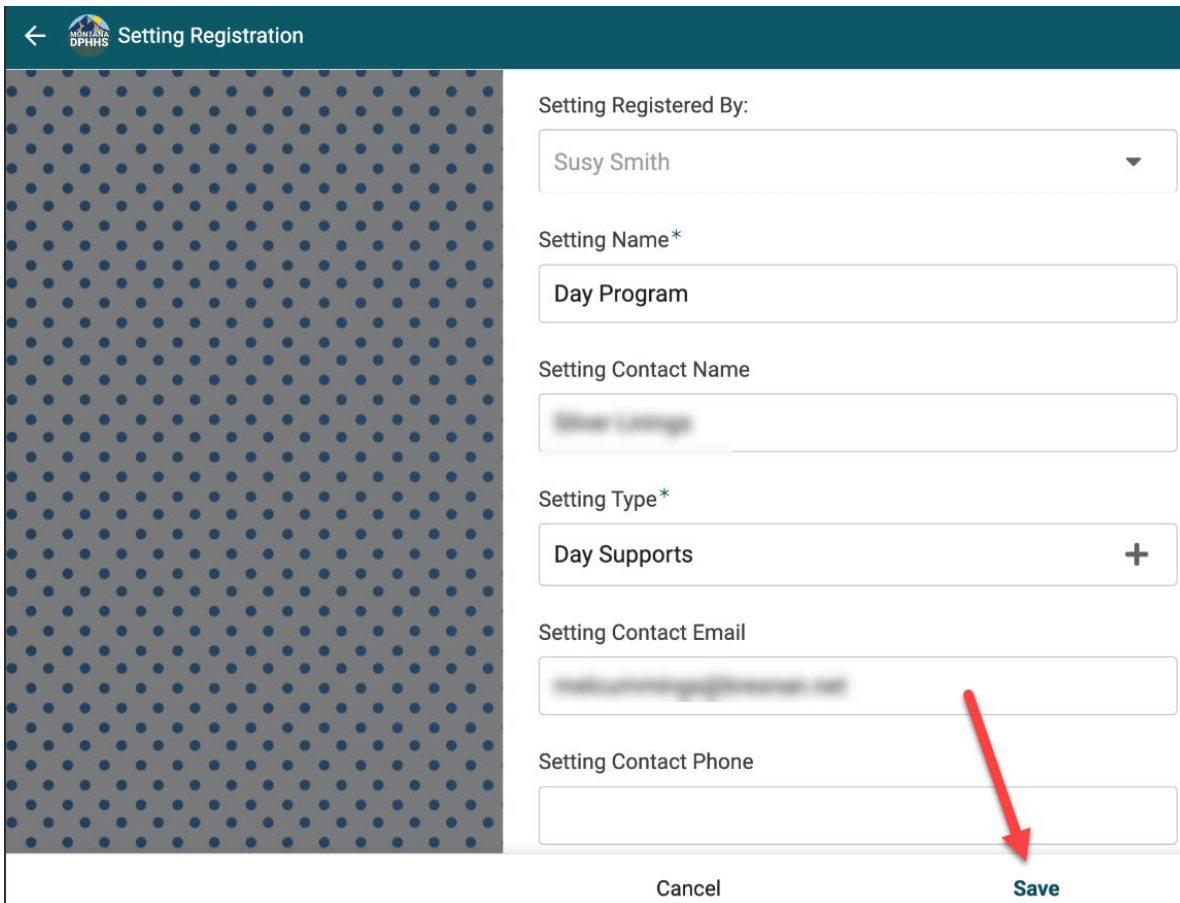
Save any edits to the page by clicking the Save button at the bottom of the screen.
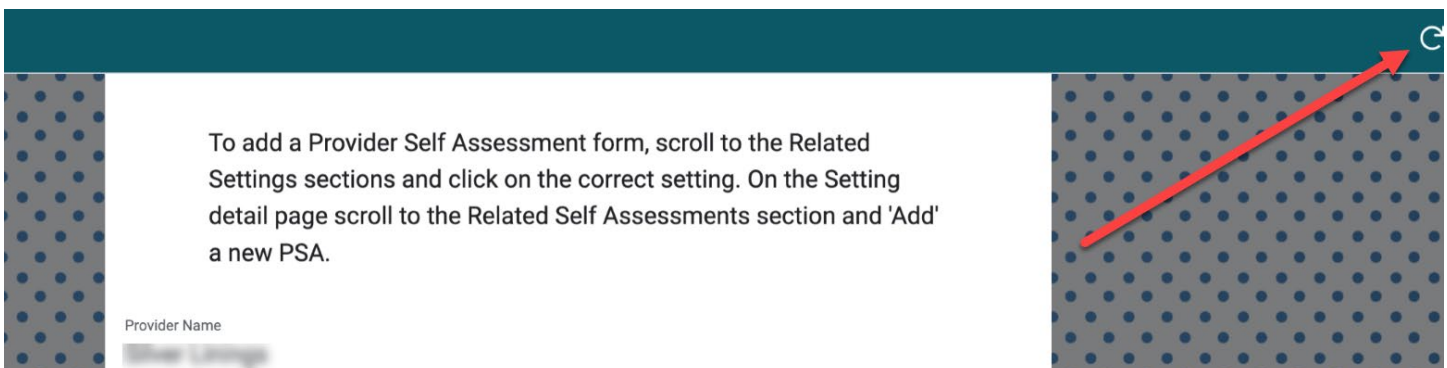
*Some items or records, when edited, have impacts on other areas of the system. If you are not sure of the impacts on editing an item or record inquire with HCBS staff before making the change.

Synching Records

Most record additions, deletions, and changes synch (update) automatically in the system within a few seconds of the update being made.

The sync icon is a small white circular arrow located in the upper-right hand corner of the screen. If you don't see an update that you expect to see in the SETS Provider Portal you can click the synch icon to force an update. While records are synching, you may see a small orange number on top of the synch icon.

Logging Out

Log out of the SETS Provider Portal by clicking the Log Out button, which is located at the bottom of the Main Menu.

HCBS Provider Portal

💬 All of My Provider's Comments

✋ Pending Users (0)

📂 My Provider Self Assessments

🏠 Setting Registration

📇 My Providers Users

ⓘ About

▦ App Gallery

T

Log Out