Scripts from Salesforce KM

Creating and Connecting your Account

Hi **[Customer Name]**:

Thank you for reaching out! I would be happy to provide you with the appropriate steps to create and connect an account on the Resident Portal.

Using your computer, please:

1. Navigate to the Resident Portal at **districtdirect.dc.gov**.
2. Click on the tab at the top of the screen that reads 'Create an Account'.
3. Please enter your first name, last name, and a valid email address as your username, create a password and select your security question and answer. Once complete, please check the box stating that you agree to the terms and conditions of this site and click 'Sign Up'.
4. You should now see your Dashboard. From here, click on the blue 'Connect Account' button.
5. You should now see the 'Connect Account' Screen. From here please enter your first and last name, date of birth, Sex, and select which identity verification option you wish to provide by checking the box next to SSN, Person ID, or Medical ID. Then please enter in that ID number and click 'Submit'.
6. You should now be able to access your account from the Resident Portal.

Please let me know if there is anything else I can assist you with.

Thank you.

Username Retrieval

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you retrieve your username for the Resident Portal. Please follow the steps below:

1. Navigate to the Resident Portal at **districtdirect.dc.gov** and on the login screen, click the 'Forgot Your Username' link.
2. Enter the email address you provided during registration into the 'Email Address' field.
3. After clicking 'continue', a pop-up should appear asking you to check your email to retrieve your username. Click 'Ok'.
4. Check your email as you should have received an email with your username included.
5. Confirm you can access your account by navigating back to the Resident Portal and try logging in again.

Please let me know if there is anything else I can assist you with.

Thank you.

Password Reset

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you retrieve your password for the Resident Portal. Please follow the steps below:

1. Navigate to the Resident Portal at **districtdirect.dc.gov** and on the login screen click the 'Forgot Your Password' link.
2. Enter the email address associated with your account in the 'Email Address' field. Once complete, please click 'Continue'."
3. After clicking 'Continue, a pop-up should appear asking you to check your email to reset your password. Click 'Ok'.
4. Check your email and click the included link to reset your password.
5. Create a new password.

   a. Passwords must contain at least one (1) upper and one (1) lower case letter, one (1) number, a special character (e.g., ~,*, !, &, etc.), and must be between 8 – 20 characters long in total

6. Confirm you can access your account by navigating back to the Resident portal and try logging in again.

Please let me know if there is anything else I can assist you with.

Thank you.

Application Submission

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you submit an application through The Resident Portal. After logging in, please follow these steps:

1. Navigate to your Dashboard.
2. From your Dashboard, click the blue box that says 'Apply for Benefits'.
3. Please check the boxes next to each benefit you wish to apply for and click 'Continue'." From there, you will see a series of screens asking you questions that serve as the application to apply for public benefits.
4. Once you complete the application, please be sure to review the details before hitting submit. Once you submit, you cannot make a change without delaying the processing of your application.
5. Be sure to submit your verification documents to complete the application process.

Please let me know if there is anything else I can assist you with.

Thank you.

Verification Document Upload

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you upload verification documents through the Resident Portal. After logging in, please follow these steps:

1. Navigate to your Dashboard.
2. From your Dashboard, click on 'View Details' below Verifications in the Account Summary tile.
3. You should now see the Outstanding Verifications Screen. From here you can click on the downward are next to 'Verifications Due' to expand this box. This expanded view will display a complete list of your pending verifications.
4. Click the grey box in the Action column. This will open a pop up window where you can select the appropriate document type from the drop down options. Next Please click 'Add File'.
5. A pop up window should appear where you can select the appropriate verification document from your desktop. Please attach that file and click 'Upload' to upload the document.
6. Once you complete uploading all the documents, please be sure to review the details before hitting 'submit'.

Please let me know if there is anything else I can assist you with.

Thank you.

Recertification / Renewals

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you recertify through the Resident Portal. After logging in and confirming you have connected your account, please follow these steps:

1. Navigate to your Dashboard.
2. Click on the blue tile that says 'My Information'
3. Click 'Recertifications and Renewals" from the bottom right-hand side of the screen.
4. Click 'Continue' under the Action Required tile.
5. Follow the on-screen prompts and complete all questions on the recertification form.

   a. Make sure you review your answers before you submit. Once you hit 'submit', you cannot make any changes.

6. Electronically sign and submit the document by entering today's date, your full name, and your initials. Check the box stating that you grant DHS permission to get information about you to complete the application and click next.
7. You will then see the Submission Confirmation screen, stating that your Recertification have successfully been submitted.

Please let me know if there is anything else I can assist you with.

Thank you.

Change of Circumstance

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you submit a change of circumstances through the Resident Portal. After logging in and confirming you have connected your account, please follow these steps:

1. From your dashboard, click "My Information"
2. Click on the "Change of Circumstances" tile
3. Click "New" to begin a new change of circumstances form
4. Read through the overview before you begin
5. Once you begin, you will be guided through important details and questions to complete your form
6. Once you complete answering questions and review your submission, e-sign, initial, and date your form to submit
7. Once you receive confirmation that your form has been submitted, navigate back to your dashboard to upload your verification documents

Please let me know if there is anything else I can assist you with.

Thank you.

Checking Case Status

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you check your case status on the Resident Portal. After logging in and connecting your account, please follow these steps:

1. Navigate to your Dashboard
2. Select 'Cases'
3. You should be able to see your active cases here. You will also be able to see case status and your recertification period for each case, as well

Please let me know if there is anything else I can assist you with.

Thank you.

Checking Payment Information

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you check your payment information on the Resident Portal. After logging in and connecting your account, please follow these steps:

1. Navigate to your Dashboard.
2. Select 'Payments'.
3. You should be able to see your upcoming and past payment information here.

Please let me know if there is anything else I can assist you with.

Thank you.

Requesting a Replacement Medical Card

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you Request a Medical Card through the Resident Portal. After logging in and connecting your account, please follow these steps:

1. Navigate to your Dashboard.
2. Click on the blue tile that says 'My Information'
3. Click 'Request Medical Card' from the bottom left-hand side of the screen.
4. You will now see the Request a Medical Card screen. From here select the name of the person who needs the replacement card and click 'Request'.
5. A popup window should appear asking you to confirm your submission. Click 'Submit'.

Please let me know if there is anything else I can assist you with.

Thank you.

Viewing Your Notices

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you view your notices on the Resident Portal. After logging in and connecting your account, please follow these steps:

1. Navigate to your Dashboard.
2. Select 'Notices.
3. You should be able to view and download all your notices.

Please let me know if there is anything else I can assist you with.

Thank you.

Unlinking Your Account

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you unlink your account.

When you create and connect your new account you will automatically be unlinked from your existing account. There are no further steps you need to take to unlink that account.

Please let me know if there is anything else I can assist you with.

Thank you.

Creating an Authorized Representative

Hi **[Customer Name]**:

Thank you for reaching out! I would be more than happy to help you Allocate an Authorized Representative on the Resident Portal. After logging in and connecting your account, please follow these steps:

1. If Navigate to your Dashboard.
2. Click on the blue tile that says, 'My Information'.

3. Click 'Authorized Representative' from the left-hand side of the screen.
4. Click 'Create an Authorized Representative' next to the member of your household who requires an authorized representative.
5. Fill out the personal information (Name, Date of Birth, and Address) of your authorized representative.
6. Check the box next to the benefits the authorized representative will be allocated to and click continue.
7. Check the boxes next to any activities you wish your Authorized Representative to be able to complete on your behalf and select 'Finish'.

Please let me know if there is anything else I can assist you with.

Thank you.