Getting Started in the Portal

How to Log In, Update Your Profile, and Navigate the System

Welcome to the Greater New Hope Family Services Portal. This guide walks you through how to:
1. Activate your account and set your password (new users)
2. Log into the portal
3. Update your profile
4. Navigate the portal features

1. New User First-Time Login & Password Setup

When your account is created by an administrator, you'll receive an email from:
GNH case management test portal notifications@clouddatadiva.com

The email will include:
- Your username
- A link to set your password
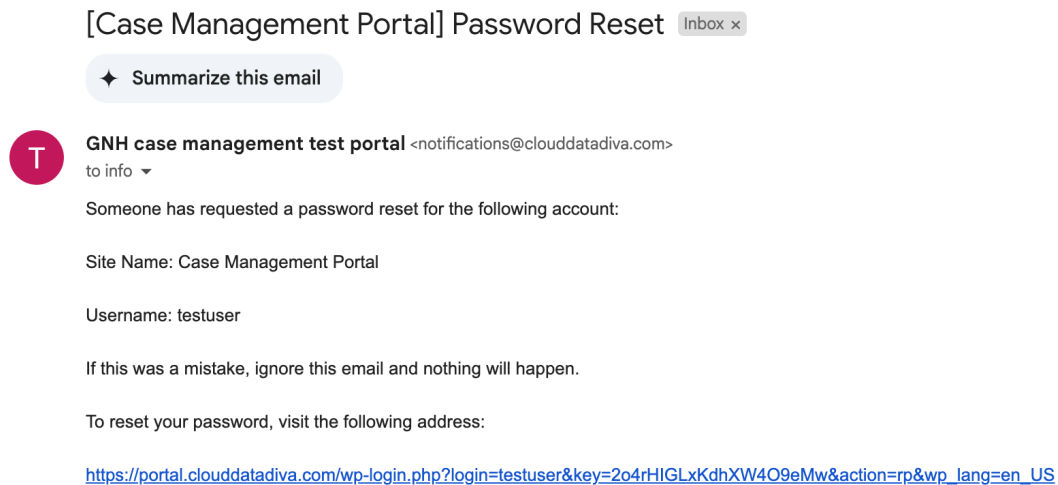
Click the link in the email to open the password setup page.
You'll be asked to:
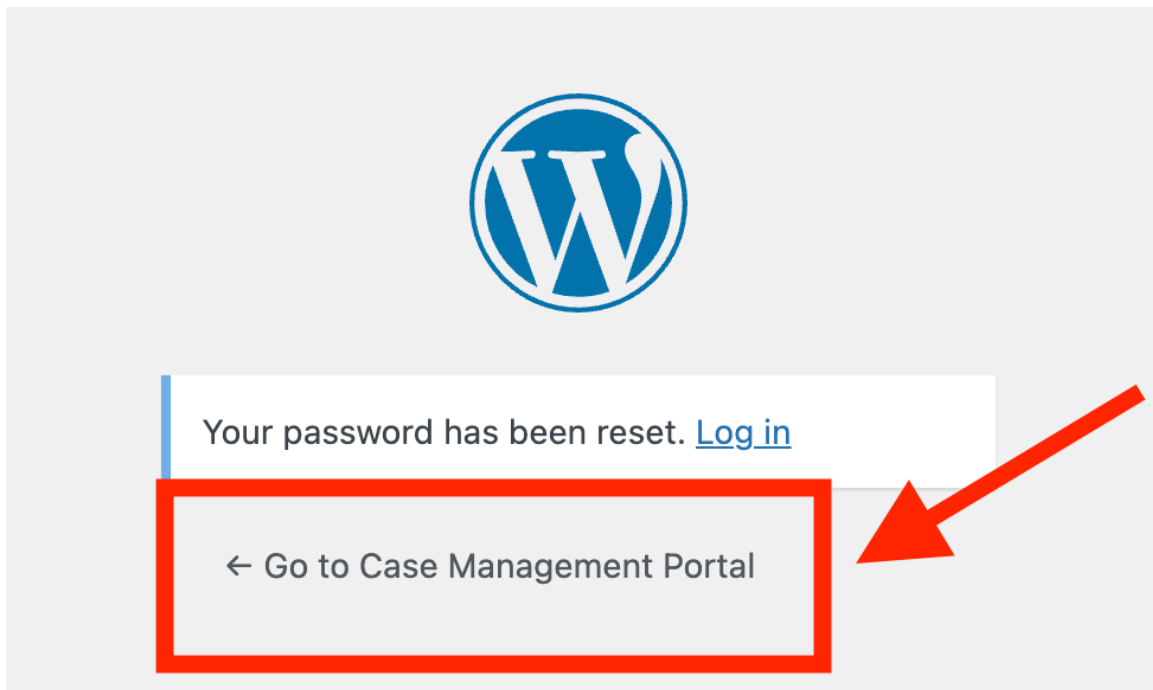- Enter a strong password (or generate one)
- Click Save Password

After saving your password, you'll see a confirmation screen:

Your password has been reset.

IMPORTANT:
Do not click the "Log in" link.
Instead, click "← Go to Case Management Portal" — this will bring you to the correct login screen.

2. Logging In to the Portal

Now that your password is set, go to:
https://portal.clouddatadiva.com

Enter your email and your password, then click Login.

Should you forget your password, you can reset it anytime by clicking **"Forgot your password?"** A reset link will be emailed to you.

3. Updating Your Profile

You can update your profile details in two different ways:

Option 1: Use the Sidebar Menu
- Click Account & Settings in the left-hand navigation
- Select My Account

GREATER NEW HOPE FAMILY SERVICES
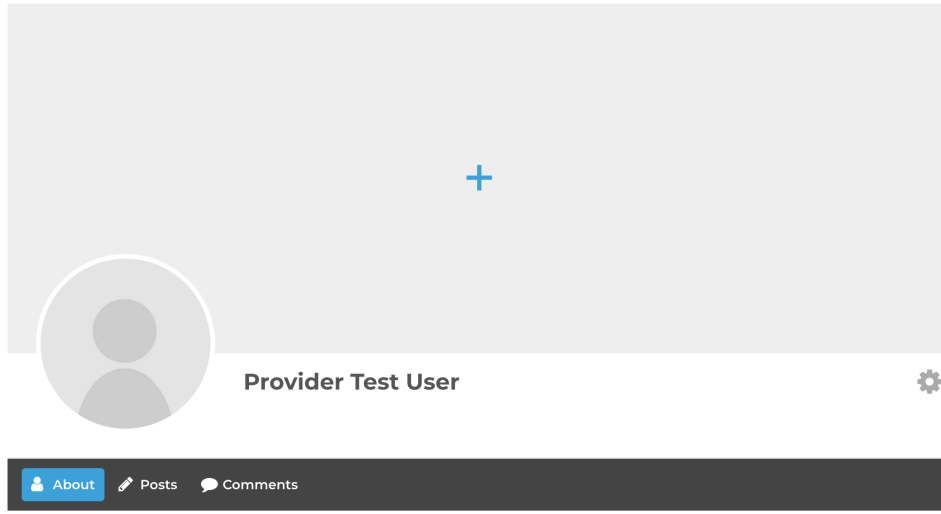
Portal Dashboard

Referral ⌄

Case Notes ⌄

Account & Settings ⌄

My Account

Change Password

Log Out

Provider Test User

Provider Test User

⚙
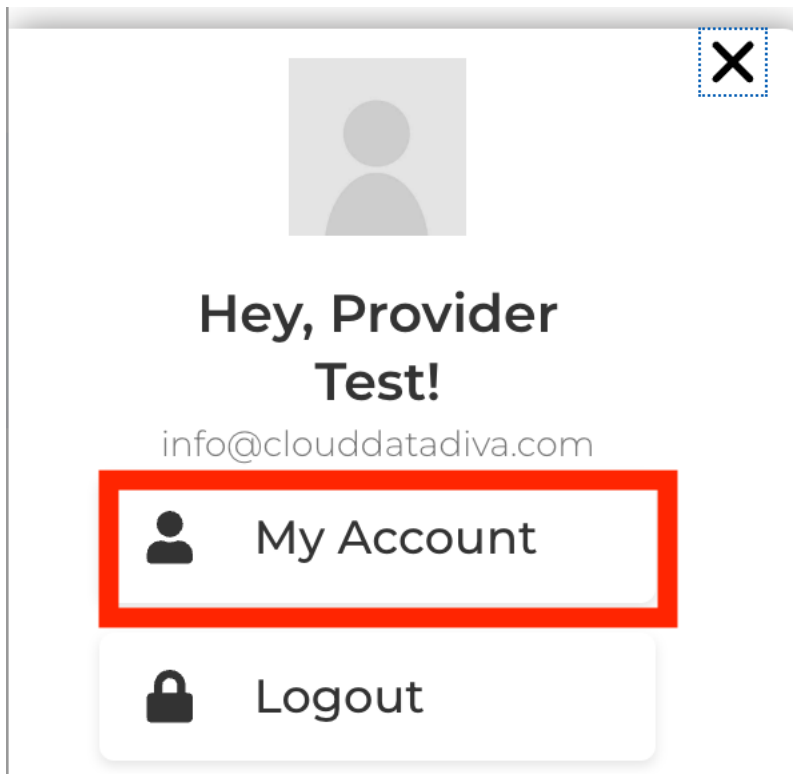
👤 About   ✏ Posts   💬 Comments

Option 2: Use the Profile Icon
- Click the profile icon in the right corner of the screen
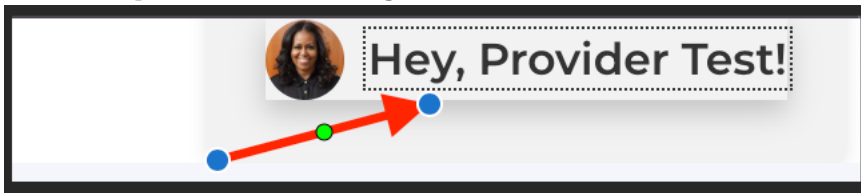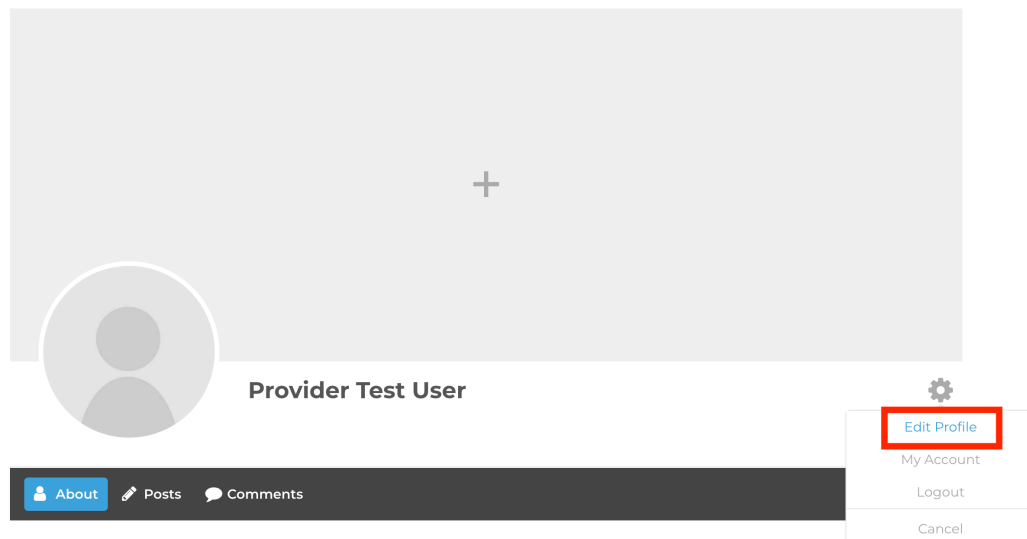

Hey, Provider Test!

- Choose My Account

From there, you will land on the profile page where you can :
- Click Edit Profile
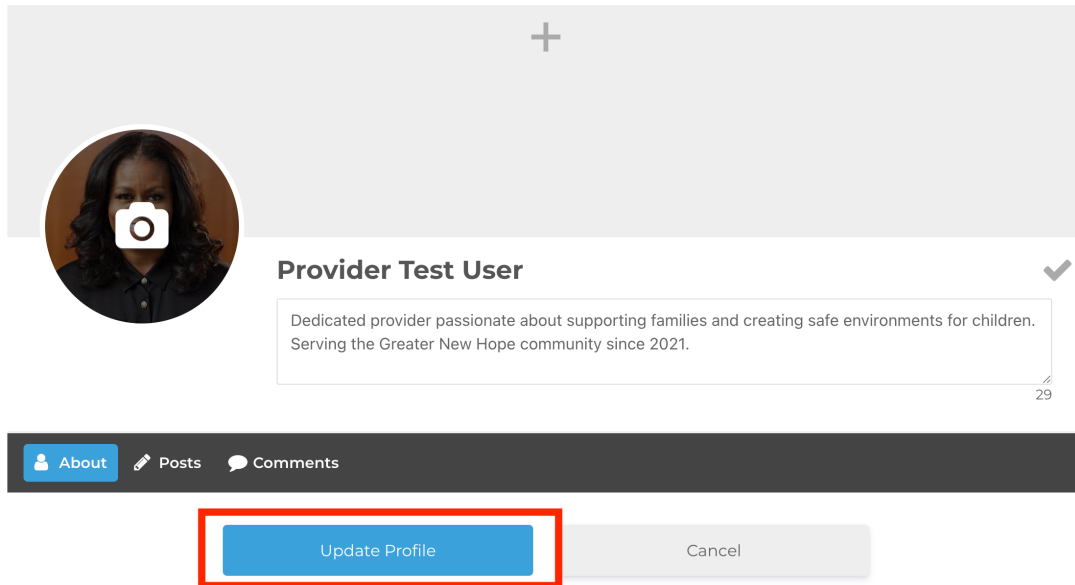
Provider Test User

On the Edit Profile Page, You Can:
- Tell us a bit about yourself in the bio field
- Change your profile picture by uploading a new image

- Update any other contact or account info displayed

Click Update Profile to save changes.

4. Navigating the Portal

Once logged in, you'll land on your personalized dashboard.

Key sections include:

Case Notes
- Create, edit, and submit case notes
- Use My Task Inbox to manage drafts or pending reviews

Referrals
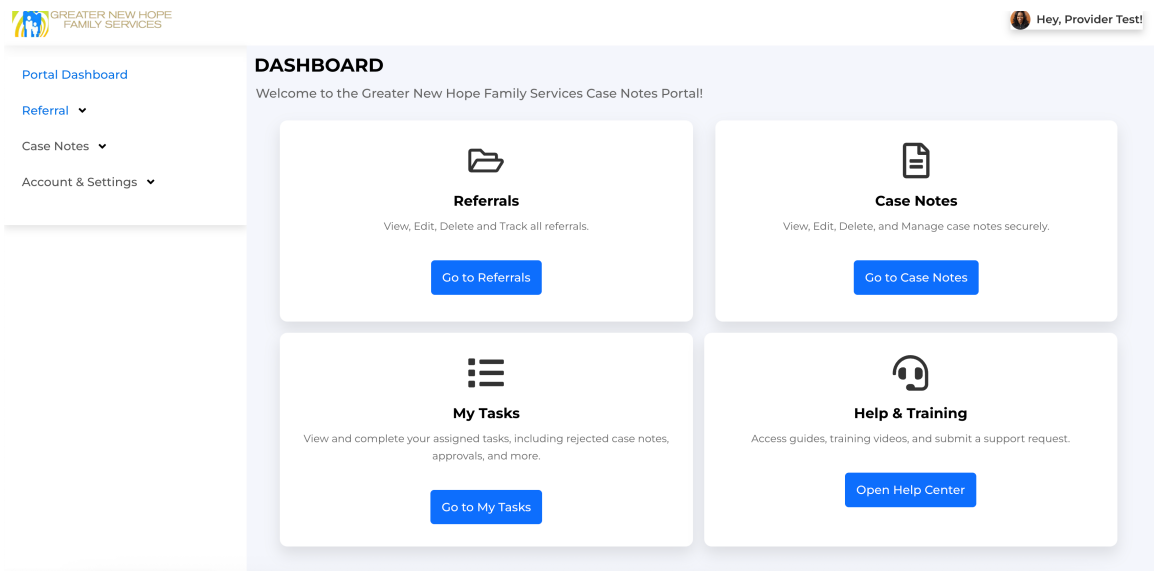- Admins can create and manage client referrals

My Tasks
- View tasks assigned to you
- Click to take action on notes or referrals

Help & Training Center
- Find downloadable guides, workflow charts, and training videos

GREATER NEW HOPE FAMILY SERVICES

- Portal Dashboard
- Referral ⌄
- Case Notes ⌄
- Account & Settings ⌄

DASHBOARD

Welcome to the Greater New Hope Family Services Case Notes Portal!

Referrals

View, Edit, Delete and Track all referrals.

Go to Referrals

Case Notes

View, Edit, Delete, and Manage case notes securely.

Go to Case Notes

My Tasks

View and complete your assigned tasks, including rejected case notes, approvals, and more.

Go to My Tasks

Help & Training

Access guides, training videos, and submit a support request.

Open Help Center

Need Help?

Visit the Submit a Support Request section in the Help & Training Center if you ever need assistance.