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## Applying to Be a Provider

This is how applicants apply to become providers using cb Access.

**Note:** Applicants and agency users both take part in this process. They do different steps. Applicants do step 1 through 12. Agency users do steps 13 through 16 as well as step 18. Agency users should also check the note in step 1. Both parties can do step 17.

1. To access cb Access portal, applicants should have received a user account from their Agency administrator. Click the link and follow the instructions to login and create a password.
  - **For Agency administrators:** In order to provide access to external applicants, a user with Administrator access to the cb Admin user role feature creates a Casebook user account for the applicant with the **Application Portal User** role. See [Adding New User Individually](#) and [Roles and Permissions](#) for more information.
2. When you log in, you are at the beginning of the application process.
  - **Note:** As you go through the process, the application is labeled based on its status. For example, after you begin to enter your information until you submit it for review, it is then in "Draft."
3. Enter all the required information such as your name, date of birth, gender, race, etc.
  - When filling out contact information, you have the option to create more than one email address and list one of those email addresses as "primary." To do this, click the "Primary" toggle next to your preferred email address. You can do this same step for phone numbers.
4. Click **Next** .
  - Alternatively, click **Save**  to save your application and come back to it later.
5. Click "Yes" or "No" as to whether or not there is a second applicant.
  - If there is a second applicant (this might be the first applicant's spouse or partner, for example), fill out all the information for the second applicant. This information is the same as the information listed in step 3.
6. Click **Next** .