

CLIENT PORTAL WORKFLOW - CLIENTS

CLIENT PORTAL INVITE/SETUP: INFO FOR CLIENTS

1. After providing your email address to your Therapist or Front Desk, you will receive an email invite to the Client Portal
 - o This link expires! Please create your profile within 3 days of receiving the link!
2. Click the link to create a username/password
3. Log in to the Client Portal (it won't automatically log you in after creating username/password-there should be a link to log in, otherwise you can log in from www.elliefamilyservices.com, and click the Client Portal link at the top)
4. You will receive an email with a link any time there is a new document to view/fill out
5. If you have something new to see, your client portal will open to the correct Module after logging in. If you have more than one new item, it will open to one Module and a star will appear next to other Modules with new items. If there is nothing new to look at, the portal will open to the Home Module.

Home Module

1. Click on your name in upper right hand corner for the following options:
 - a. Change Password: allows you or rep to change your portal login password
 - b. Communication Preference: allows you to choose your preference, however it does not limit communication to only what you select. Staff can see your choice in your Client File
 - c. Representative Accounts: you can see all of your representatives. If you uncheck the 'Active Status' checkbox, the rep will no longer have access to the client portal
 - d. Help: brings you to FAQ page
 - e. Logout: will log you out of the Client Portal and bring you back to the login page
 - f. Picklist/Hamburger Symbol: will hide or display the bar along the left side of the portal
- Appointments
 - o You can view future and past appointments

- Payments
 - You can download and view your statements
 - You will be able to pay bill online

- Documents
 - Forms to Complete: will list the forms sent for you to complete
 - Must complete the whole document at once, it does not save
 - My Documents: allows you/rep to download and see clinical documents
 - Transition of Care: allows you to download the CCDA (Consolidated Clinical Document Architecture)