Assign and Remove Portal Menu Permissions for Clients and Representatives

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Path: Main Menu > Admin Tools Menu > System Setup (Supplemental)

About

Your Agency has the ability to add or remove access to particular areas of the portal for both clients and their representatives. A representative may be a parent or could be a social worker, etc. You can give access to the following areas of the portal:

- **Documents**: This menu option allows clients/representatives to access Signable Forms, Editable Forms, CCDAs, and Patient Education that has been shared to the portal.
- **Billing**: This menu option allows clients/representatives to see their current balance, add a debit/credit card to save on file, make payments and view their payment history.
- **Medications/Diagnoses:** This menu option displays any primary or secondary diagnoses that have been entered in the Diagnosis widget and also shows Active and Inactive medications for the client.
- **Messages**: This menu options allows clients/representatives to send and receive messages from your Agency.
- **Appointments**: This menu option allows clients/representatives to view, confirm, reschedule, or cancel upcoming appointments.
- **Action Log**: This menu option allows clients/representatives to view their activity history on the portal.

Assign or Remove Portal Menu Permissions

1. Navigate to System Setup (Supplemental) by following the path above.
2. Select **Client Portal Configuration**.
3. In the **Allow Client** and **Allow Representative** columns, select the checkboxes for the menu permissions you would like for your clients and representatives to have or deselect a checkbox to remove a permission.

Portal Menu Permissions

Title	Allow Client	Allow Representative
Documents	☑	☐
Billing	☑	☑
Medications/Diagnoses	☑	☐
Messages	☑	☑
Appointments	☑	☐
Action Log	☑	☐

Preview changes | Save changes | Cancel changes

4. Click the **Save Changes** button.