

# Set Up a Client Portal Account

Last Modified on 07/25/2022 8:46 am EDT

### Path: Main Menu > Admissions Menu > Face Sheet

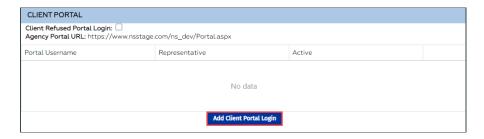
### **About**

Portal access is given to clients through the Face Sheet (if your Agency is contracted for the Client Portal). You can create a portal account for the client or a representative that the client may need to give access to their information (e.g. family member, social worker, etc.). There is also an option to notate if the client refused a portal login so that your staff knows this client declined a portal login at future visits. Below you'll learn how to:

- Add a Client Portal Login
- Change a Client Portal Login to Inactive
- View Client Portal Changes

# Add a Client Portal Login

- 1. Navigate to the Face Sheet by following the path above.
- 2. Search for and select the client, and click the Edit button.
- 3. Scroll down to the Client Portal section, and click the Add Client Portal Login button.



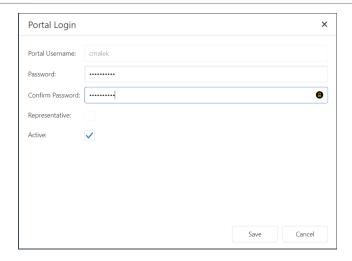


**Note**: If the client refused a portal login, select the **Client Refused Portal Login** checkbox so that your staff can easily see the client has been asked but refused.

- 4. Enter the following information in the Portal Login window:
  - Portal Username: This is what the client or representative will use to log in to the Client Portal.
  - Password: Enter the password that will be used to log in to the Client Portal.
  - Confirm Password: Reenter the password from above.
  - Representative: Click this checkbox if the portal user created is a representative of the client.
  - Active: This checkbox is selected by default and should be checked to allow login to the Client Portal.







5. Click the Save button. The portal user is added to the Client Portal section.



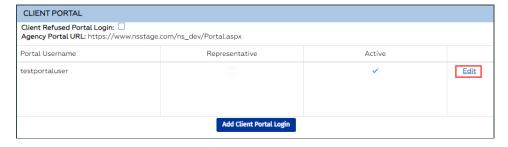
- 6. Provide the Portal Username and Password to the client or client representative.
- 7. Repeat the above steps if you need to add additional portal logins for this client.



8. Click the **Update** button to save the changes to the Face Sheet.

# Change a Client Portal Login to Inactive

- 1. Navigate to the Face Sheet: Main Menu > Admissions Menu > Face Sheet
- 2. Search for and select the client, and click the Edit button.
- 3. Scroll down to the Client Portal section, and click Edit.



- 4. Deselect the Active checkbox.
- 5. Click the Save button.







**Note**: If the portal user requires the login to be active at a later time, click the Edit button and select the Active checkbox on the Portal Login window.

# **View Client Portal Changes**

When a client portal account is created and/or any changes have been made, these changes can be viewed on the Client Portal and in NextStep.

#### **Client Portal**

- 1. Log in to the Client Portal.
- 2. From the Client Portal Navigation Menu, click Activity. The Client Action Log is displayed.

CLIENT ACTION LOG		
	Actions	
Action	Description	Timestamp
Login	Patient Portal login by cmalek	06/16/2022 09:47:16 AM
Profile Updated	Portal Login cmalek was modified by nextstep. Changes: Password updated	06/16/2022 09:46:43 AM
Profile Updated	Portal Login cmalek was modified by nextstep. Changes: Password updated	06/14/2022 11:32:36 AM
Logout	Patient Portal logout by cmalek	06/14/2022 11:19:36 AM
Login	Patient Portal login by cmalek	06/14/2022 11:19:33 AM
Logout	Patient Portal logout by cmalek	06/14/2022 11:19:26 AM
Login	Patient Portal login by cmalek	06/14/2022 11:19:11 AM
Login	Patient Portal login by cmalek	06/14/2022 10:55:29 AM
Logout	Patient Portal logout by cmalek	06/14/2022 10:54:55 AM
Reset Password	Password changed by cmalek	06/14/2022 10:53:59 AM

## **NextStep**

- 1. Navigate to the Document Center: Main Menu > Reports Menu > Document Center
- 2. Search for and select the client.
- 3. Select the Case #radio button, and click the Open Case button.
- 4. Locate the Face Sheet Change Log heading, and select Changes to this Client's face sheet radio button.



- 5. Click the Open Form button.
- 6. Set the filters for the report, and click the **Apply Filter** button.

The log displays all changes to the Face Sheet, including when a portal login was created and when the password was updated.





Change Type: Client-Specif Changes By: All Users	ic Only 🔻	
Date Range: Start Date:	End Date:	
Apply Filter		
User: NextStep Solutions  Date and Time: 6/16/2022 9:46:48 AM  Updated the following dynamic fields: Current Residence		
In current residence field: Current Residen User: NextStep Solutions Portal Login cmalek was modified.	ce - {Set entry: CurrentHomeless to value: No} Date and Time: 6/16/2022 9:46:43 AM	
Password updated User: NextStep Solutions Portal Login cmalek was modified.	<b>Date and Time:</b> 6/14/2022 11:32:36 AM	
Password updated User: NextStep Solutions Updated the following dynamic fields: Cur	Date and Time: 6/14/2022 10:46:25 AM rent Residence	
In current residence field: Current Residen User: NextStep Solutions Added a new portal login	ce - {Set entry: CurrentHomeless to value: No} Date and Time: 6/14/2022 10:46:18 AM	

