Set Up a Client Portal Account

Last Modified on 07/22/2025 10:14 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**: Click into this field and type a username. This is what the client or representative will use to log in to the Client Portal.
- **Reset Password**: This checkbox is selected by default and will generate a password.
- **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.
- **Portal User Email:** Click into this field and type the email address. You can also select the "**Populate Email from Current Residence Block"** and it will auto-populate the email entered.

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

6. When the Save button is clicked, the client or representative will receive an email with the Portal URL, username and temporary password. The client or representative will be required to enter a password of their choice.

7. Repeat the above steps if you need to add additional portal logins for this client.

> **Note**: The **Agency Portal URL** is displayed and can be provided to the client. Please note your Agency's URL is different than the example in the screenshot below.
>
>

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.

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.

Face Sheet Change Log:
⦿ Changes to this Client's face sheet

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-Specific Only

Changes By: All Users

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 Residence - {Set entry: CurrentHomeless to value: No}
User: NextStep Solutions   **Date and Time:** 6/16/2022 9:46:43 AM
Portal Login cmalek was modified.

Password updated
User: NextStep Solutions   **Date and Time:** 6/14/2022 11:32:36 AM
Portal Login cmalek was modified.

Password updated
User: NextStep Solutions   **Date and Time:** 6/14/2022 10:46:25 AM
Updated the following dynamic fields: Current Residence

In current residence field: Current Residence - {Set entry: CurrentHomeless to value: No}
User: NextStep Solutions   **Date and Time:** 6/14/2022 10:46:18 AM
Added a new portal login