

Set Up a Client Portal Account

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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.

CLIENT PORTAL		
Client Refused Portal Login: <input type="checkbox"/>		
Agency Portal URL: https://www.nsstage.com/ns_dev/Portal.aspx		
Portal Username	Representative	Active
No data		
Add Client Portal Login		



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.

Portal Login ✕

Portal Username:

Password:

Confirm Password:

Representative:

Active:

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

CLIENT PORTAL			
Client Refused Portal Login: <input type="checkbox"/>			
Agency Portal URL: https://www.nsstage.com/ns_dev/Portal.aspx			
Portal Username	Representative	Active	
testportaluser	<input type="checkbox"/>	✓	Edit
<input type="button" value="Add Client Portal Login"/>			

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.

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.



CLIENT PORTAL	
Client Refused Portal Login: <input type="checkbox"/>	
Agency Portal URL: https://www.nsstage.com/ns_dev/Portal.aspx	

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**.

CLIENT PORTAL			
Client Refused Portal Login: <input type="checkbox"/>			
Agency Portal URL: https://www.nsstage.com/ns_dev/Portal.aspx			
Portal Username	Representative	Active	
testportaluser	<input type="checkbox"/>	✓	Edit
<input type="button" value="Add Client Portal Login"/>			

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 11:52:36 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:
<input checked="" type="radio"/> 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:
Changes By:
Date Range: Start Date: End Date:

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