

Reset a Client Portal Password

Last Modified on 11/21/2022 8:17 am EST

About

A client's portal password can be reset by Agency staff members or by the client on the Client Portal. To reset the password using the steps below, the client must know their original password. To change a client password:

- [Reset a Portal Password from the Face Sheet \(Agency Steps\)](#)
- [Reset a Portal Password from the Portal \(Client/Representative Steps\)](#)
- [View Client Portal Changes](#)

Reset a Portal Password from the Face Sheet (Agency Steps)

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. Under Client Portal, click the **Edit** button for the user you want to change the password.

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

4. In the Portal Login window displays, enter the following information.

- **Reset Password:** Click the checkbox to proceed with resetting the user password
- **Portal User Email:** Email address to send the reset password URL.
- **Populate Email from Current Residence Block** Click this button to populate the Portal User Email address from the Current Residence Email on the Face Sheet.

Portal Login ✕

Portal Username: *

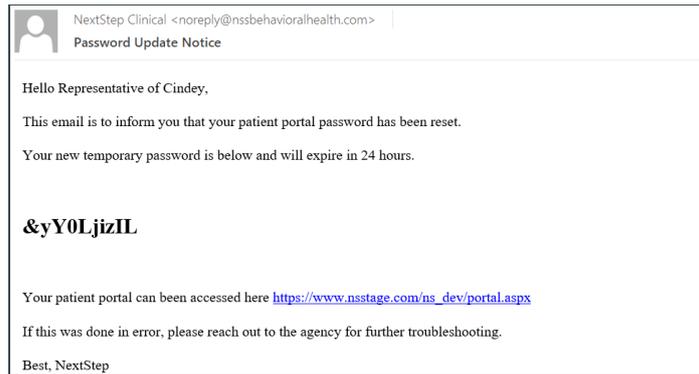
Reset Password:

Representative:

Active:

Portal User Email: *

5. Click the **Save** button.
6. The Portal user will receive an email with the temporary password and portal URL.



Note: The temporary password will expire in 24 hours.

- Once the link is clicked, the Client Portal login window displays. Enter your username and temporary password then press the **Sign In** button.
- The Change Password window displays, complete the window then click the **Submit** button.



CHANGE PASSWORD

NEXTSTEP SOLUTIONS

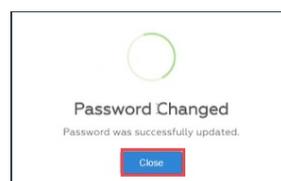
Email:

Current Password:

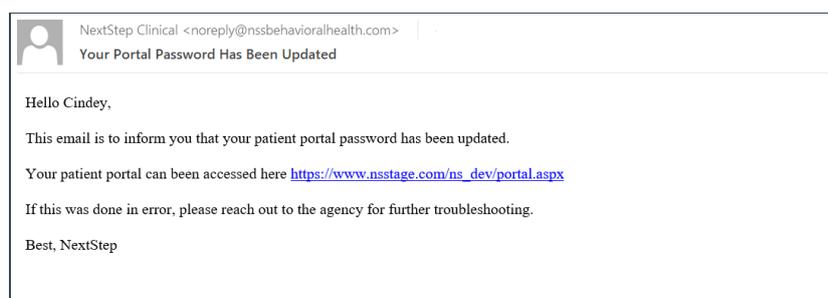
New Password:

Confirm New Password:

- A dialog box displays the password has been successfully changed, click the **Close** button.

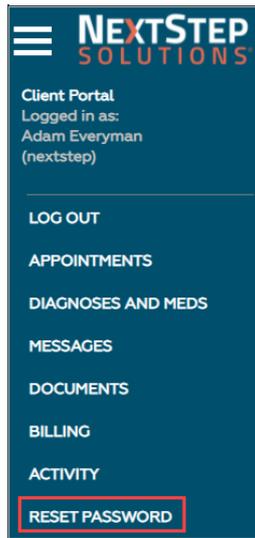


- The client will receive an email that their portal password has been updated.

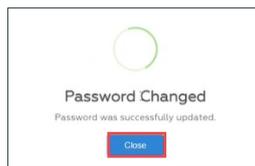


Reset a Portal Password from the Portal (Client/Representative Steps)

1. From the Client Portal Navigation Menu, click **Reset Password**. The Change Password window is displayed.



2. Enter the Current Password, New Password, and Confirm Password.
3. Click the **Change password** button. The Password Changed successful window is displayed.
4. Click the **Close** button.



An email is sent confirming the password change.



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:
<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:	<input type="text" value="Client-Specific Only"/>
Changes By:	<input type="text" value="All Users"/>
Date Range:	Start Date: <input type="text"/> End Date: <input type="text"/>
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 Portal Login cmalek was modified. Date and Time: 6/14/2022 11:32:36 AM	
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	