**Family Portal – Granting Access**

# Introduction

Use the following document as a **baseline for your communications with your team to explain and understand how to grant access to the Family Portal for clients and client contacts.** *Please* ***adjust the points as needed*** *based on your agency’s specific Family Portal configuration and access you provide to users. Be aware of* ***spacing changes****, due to any edits you make.*

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# Granting Client’s Family Portal Access

1. Navigate to the **client’s profile**
2. Select the **overview** tab
3. In the top right corner, click on **“Add Family Portal Access”**

A screenshot of a computer

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A screenshot of a computer

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1. In the resulting dialogue you will:
   1. **Review the email address** for their login. This will be the email saved in the client’s demographic information. If it needs to be adjusted do so before granting access.
   2. Select a **Family Portal role type**
2. A screenshot of a email

   Description automatically generatedClick **Save**.
   1. Once you click save, an **email will automatically be sent to the users email** address with their **username and temporary password** along with a **link to the Family Portal site.** 
      1. Upon initial login the user can change their password

# Granting Client Contacts Family Portal Access

1. Navigate to the **client’s profile**
2. Select the **Client Info** tab
3. Select the **Contacts** tab
4. A client contact must exist in AlayaCare
   1. If they do not, they must be created first
5. Select the **dropdown arrow** beside view
6. A screenshot of a computer

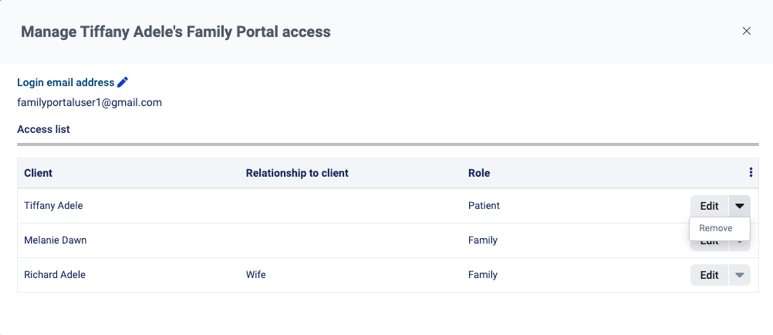
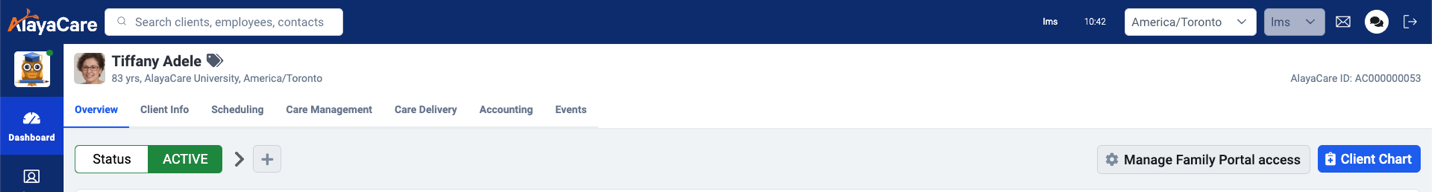
   Description automatically generatedClick **“Add Family Portal Access”**
7. In the resulting dialogue, the **email** displayed will be their **username associated with their family portal account login.** 
   1. If it needs to be adjusted do so before granting access, by editing their contact information.
8. Choose a **Family Portal role** for the contact
9. Click **Save**
   1. An **email will automatically be sent** to their email address with their login details and a link to the Family Portal site
      1. Upon Initial login the user is prompted to change their password

**Managing Family Portal Access**

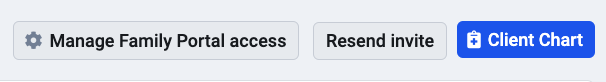
If **changes to the role type** of the user or other **edits** need to be made, you can **manage a client or client contact’s family portal access** as well as **remove** access.

To manage a **client’s** Family Portal Access:

1. Navigate to the client’s **profile** > **overview** tab
2. In the top right corner select **“Manage family portal access”**

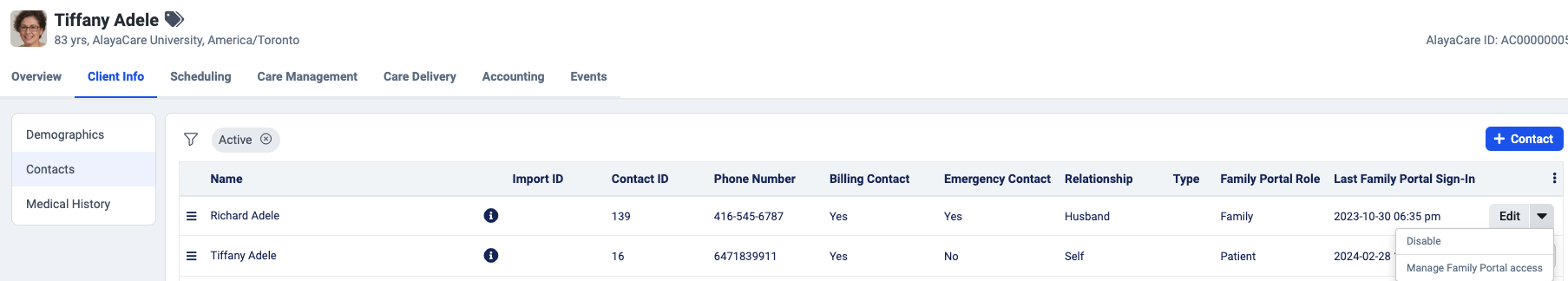


1. **Edit** or **remove** access as needed.
2. If a client has never logged in, you will see the option to resend the invite to them.



To manage a **client contacts** Family Portal Access:

1. Navigate to the **client’s profile** > **Client Info tab** > Select **Client Contacts**
2. From the dropdown beside a contact, select **“Manage Family Portal Access”**



1. A screenshot of a computer

   Description automatically generated**Edit or remove access** as needed
2. If the client contact has never logged in, you will also see the option to **resend the invite**

**Important information**

* The URL for the Family Portal website is the same as the URL you use to login to AlayaCare with the addition of **/familyportal** at the end
  + For example: [**www.homecareagency.alayacare.com/familyportal**](http://www.homecareagency.alayacare.com/familyportal)
* If the user ever forgets their password all they need to do is select the *forgot password* button on the Family Portal login page
* If the user cannot remember their username, you can look on their AlayaCare profile in their demographic or contact information to see which email they have linked to their account
* Shared or duplicate emails are not permitted
  + It is important that a client and contact do not have the same email as only one of them can create an account with that email