**Family Portal – What You Can Access**

# Introduction

Use the following document to understand the different tabs within the family portal and what you can access within each. *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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# Home Tab - Family Portal Dashboard

When logged on to the **Family Portal** users will be greeted with a **dashboard** outlining **pertinent** **details on yours or your loved one’s care.**

**This includes information on:**

* **Past, Current, or Upcoming visits**
* **Care Team**
* **Active Services**
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**From this screen you can also do the following:**

* **View Visit Details**
* **Request a Change or Cancellation to an Upcoming Visit**
* **Request a New Service**
* **View the Full Care Team**
* **Write a Review for an Employee on the Care Team**
* **View which Forms can be Completed**

# Schedule Tab

Clicking on the **Schedule tab** brings you to a view of the care you or your loved ones are receiving. You can:

* **View upcoming or previous scheduled visits**
* **View information on the tasks to be completed for an upcoming or previous visit by clicking on the visit**
* **Request a new visit (single or recurring)**

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# Care Tab

In the **Care** tab you can view information on:

* **Vital readings**
* **Medications**
* **Care Team**
* **Active Services**

You can view **recordings of vitals**, as well as view **medication** details by **clicking into each section.**

As we saw on previous tabs you can view the **full care team**, as well as **request a new service** from the care tab.

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# Profile Tab

On the **Profile** tab you will find the following information:

* **Allergies**
* **Client Profile Information (such as address, phone number, etc.)**
* **Emergency Contact information**

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You can click on the Profile and Emergency Contact **dropdown arrows** to view the **details for each section**.

**Records Tab**

In the Records tab you will find the following information:

* **View Documents**
* **View and** **and Submit Forms**
* **View Invoices**

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You can **view**, **download** and **print** **documents** that are attached to your client profile.

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From the **forms** tab,you can **view, complete and submit forms** directly from the family portal.

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From the **invoices** tab, you can see your **total account balance** as well as each **individual invoice amount**. Click on an invoice to view the full statement.