

Family Portal Recap 1 – System Configuration for Admin Staff

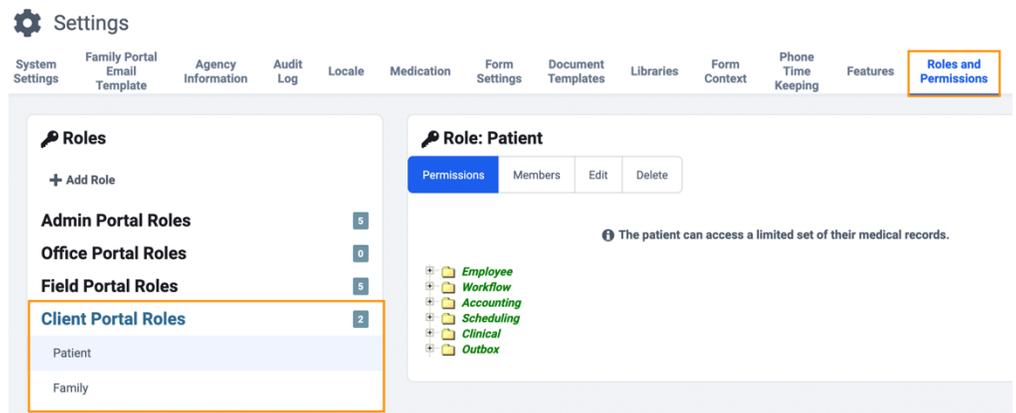
Introduction

The following document walks you through the system configuration of the Family Portal, including roles and permissions, Family Portal system settings and granting/managing access to the Family Portal. *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.*

Configuring Family Portal Roles and Feature Flags

You can customize the type of family portal access users will receive. To do this, navigate to the **roles and permissions** page under system settings. Select **Client Portal Roles**. These are the roles that are assigned to a family portal user when they are given access to the portal. Here you will see two roles by default – the **patient role** and the **family role**.

Other roles can also be created such as one for care practitioners or anyone else that will require access to the family portal. Each role can be customized in order to allow or restrict access to certain areas of the family portal.



The screenshot shows the 'Settings' menu with 'Roles and Permissions' selected. The 'Roles' section lists 'Admin Portal Roles' (5), 'Office Portal Roles' (0), 'Field Portal Roles' (5), and 'Client Portal Roles' (2). The 'Client Portal Roles' section is highlighted, showing 'Patient' and 'Family' roles. The 'Role: Patient' configuration page is shown, with the 'Permissions' tab selected. A note states: 'The patient can access a limited set of their medical records.' Below this, a list of permissions is shown: Employee, Workflow, Accounting, Scheduling, Clinical, and Outbox.

If your agency would like users to be able to view the records tab in family portal, which houses invoices, the feature flag called FP document management must be turned on.



FP Document Management
Manage documents in Family Portal

Another feature that can be enabled is the feature flag called **Family Portal – Client to Patient**. This feature **changes all instances of the word “Client” in Family Portal to “Patient”** for agencies that only refer to their customers as patients.

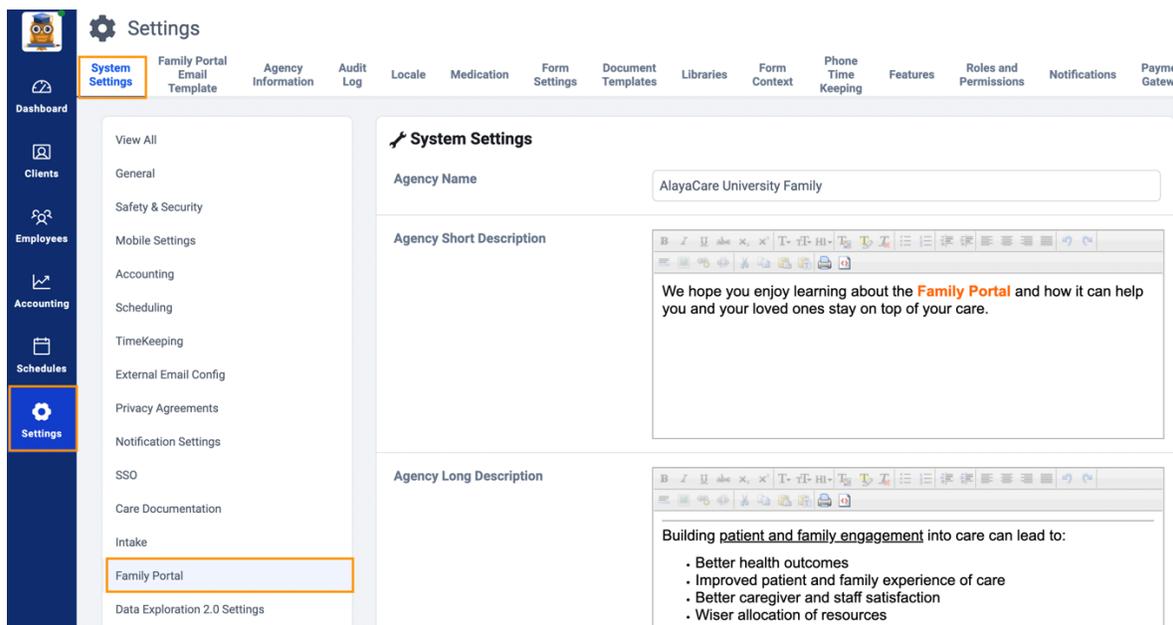


Family Portal - Client to Patient

This feature changes all instances of the word “Client” in Family Portal to “Patient” for agencies that only refer to their customers as Patients.

Configuring Family Portal System Settings

1 Navigate to **settings** and select **system settings**. Click on the **family portal** tab. Here you will see settings to customize the family portal to your organizations wants and needs.



Quick tip when **configuring system settings** is to **navigate back and forth between the AlayaCare Cloud and the Family Portal** in order to see how the settings you are putting in place impact the look of the Family Portal.

You cannot be logged in to your agency’s AlayaCare environment and the Family Portal at the same time. The way around this is to **open one of the browsers in incognito mode**. That way you will be able to flip back and forth between the two easily and see how your changes are being implemented.

Customizable Settings:

Agency Name: This is the name that will appear in the **welcome message** on the family Portal.

Agency short description: This is where you can provide a **short overview** of your agency's mission and operations for family portal users. This will be available on the **homepage of the family portal**. The font can be changed, and links or Images can also be added here, as desired.

Agency long description: Allows you to provide a more **detailed description**. It will be visible on the **agency information page** within Family Portal. As before, the font can be changed, and links or Images can also be added here.

Employee naming field: Allows you to determine how you would like employee names to appear on the family portal to users.

View client's schedule in the future: The number of days in the future that users can view their schedule on the family portal.

Invoice type: Select the type of invoice template to use for invoices downloaded from the family portal.

Invoice format: Choose the **format of those invoices**, such as pdf or csv.

Minimum number of days in advance that a service MUST be requested: Enter the **fewest number of days in advance** you wish to **allow users to request new services** from the family portal. For instance, if the number entered here is 7 days, the earliest that they can request a new service be added to their profile would be 7 days from the current day.

Maximum number of days in advance that a service can be requested: Enter the **greatest number of days in advance** that your agency will allow family portal **users to request new services** via the family portal. For example, a user cannot request for services more than a month ahead of time.

Minimum number of days in advance that a visit must be requested: Enter the **fewest number of days in advance** that you wish to **allow portal users to request new visits** from the portal.

Maximum number of days in advance that a visit can be requested: Use this setting to enter the **greatest number of days in advance** you wish to allow portal users to request new visits from the portal.

Minimum number of days in advance that a visit change must be requested: Enter the **fewest number of days in advance** you wish to allow portal users to request visit changes from the family portal.

Maximum number of days in advance that a visit change can be requested: Enter the **greatest number of days in advance** you wish to allow portal users to request visit changes from the portal.

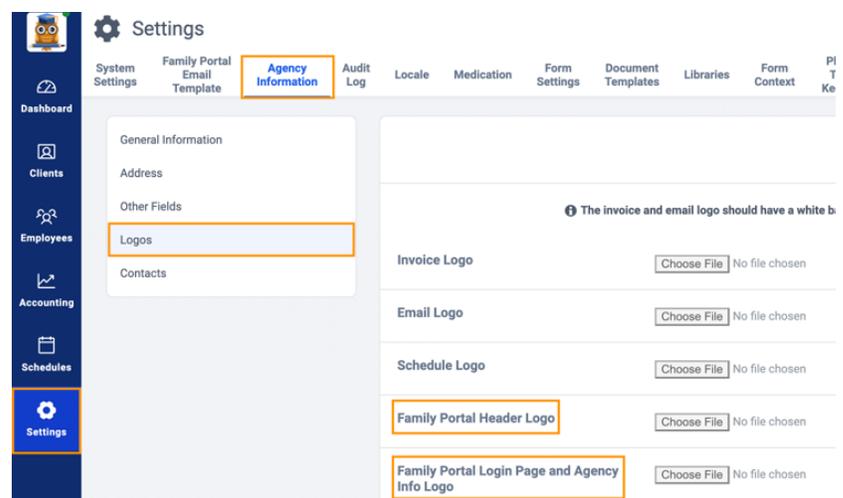
Time (In Minutes) Before a Visit When the Request New Visit Button Will Be Disabled: The number of minutes before a visit that you wish to have the “Request Visit Change button” become disabled. If you enter 0 or leave this setting blank, the Request Visit Change button will never be disabled.

Message to Display When the Request New Visit Button Is Disabled: The message you would like to be displayed once the request visit button is disabled.

Display clock in information in the family portal: If you enable this, users can see when a caregiver has clock into a scheduled shift. This is useful in cases where family members like to monitor to see if a caregiver has arrived for their loved one’s appointment.

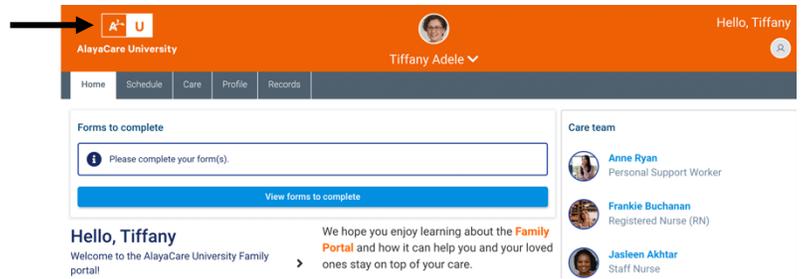
2 The next portion of system settings that need to be configured for family portal are under Settings → Agency Information. From here, select the logos tab.

Here you will be able to upload your agency’s logo or chosen image to various areas of the family portal.



Family Portal Header Logo field:

Upload the image you wish to appear as the logo in the top left corner of the family portal. It is encouraged to upload an image with a white background.



Family Portal Login Page & Agency info Logo field: The image you wish to appear on the family portal login page as well as the agency information page.

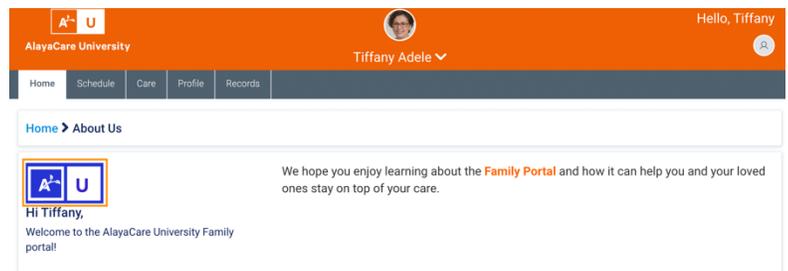


Log in to your account

Email:

Password: [Forgot password?](#)

I have read and agreed to the [Privacy Agreements](#).



3 The next portion of system settings that need to be configured for family portal is from settings → Family portal email template. There are five scenarios in which emails are sent to family portal users.

Forgot password: This is the email that a family portal user will receive if they forget their password and need to reset it. You can adjust the subject line and the body of the message as you like.

User creation: This tab holds the email template for when a family portal account is first created for a user. The information here holds the username and password to login to the portal for the first time.

When adjusting the forgot password or user creation template, your message must still contain certain parameters. The username, password, and link must remain within the template. When the email is sent to a user, the system will insert the user's email into the username parameter and autogenerate a temporary password so that the user can set or reset their family portal password.

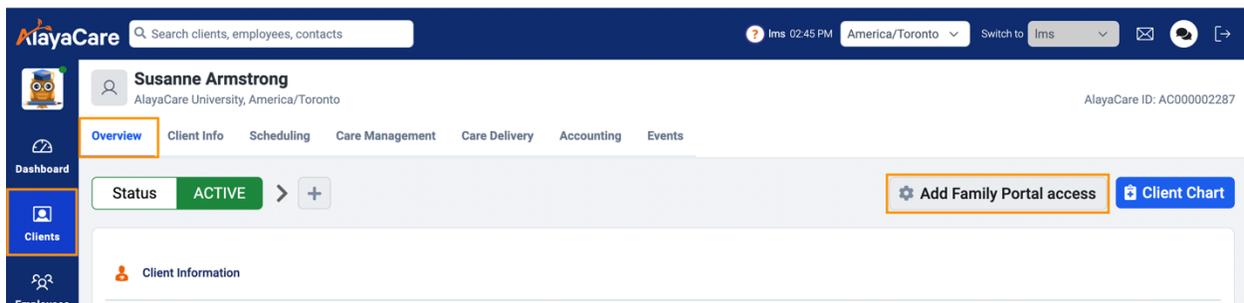
Granting access: This email is optional. It can be sent when granting an existing family portal user access to a new family portal profile.

Revoking access: This email is also optional and is used for revoking a family portal user's access to a family portal profile.

Onboarding: This is an optional email. It is used to send new portal users more information on the family portal once they have created their account, in order to help them get started and be successful.

Granting and Managing Family Portal Access for Clients

1 Granting Family Portal Access for Clients: Navigate to the client's profile. From the overview tab, click on the "add family portal access button".

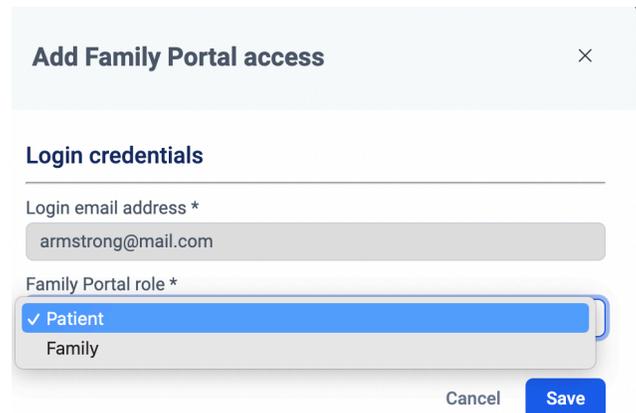


In the resulting dialogue you will be able to assign the user their family portal login credentials.

Enter the email address you wish to send the family portal email invite to. Select the family portal role you would like to assign the client.

Click save to send the invite to the client's email. They will receive the new user email containing their account details such as their username and temporary password, as well as the link to access their account.

It is important to note that all family portal user accounts must have a unique email address as a username. The same email cannot be used for different individuals!



Add Family Portal access ×

Login credentials

Login email address *

armstrong@mail.com

Family Portal role *

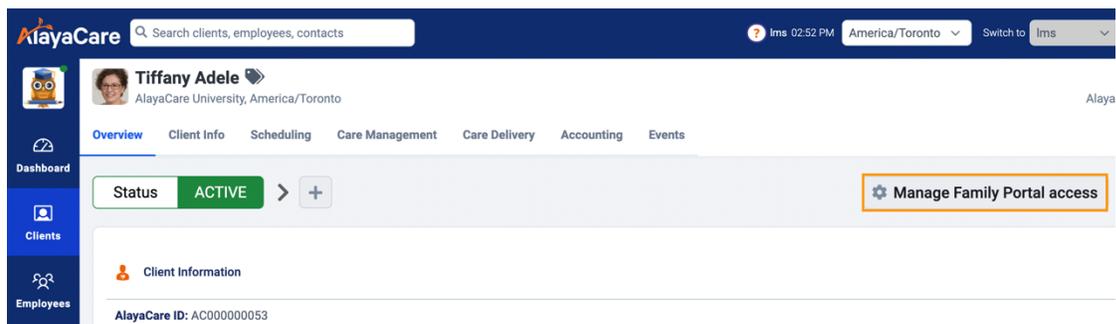
✓ Patient

Family

Cancel Save

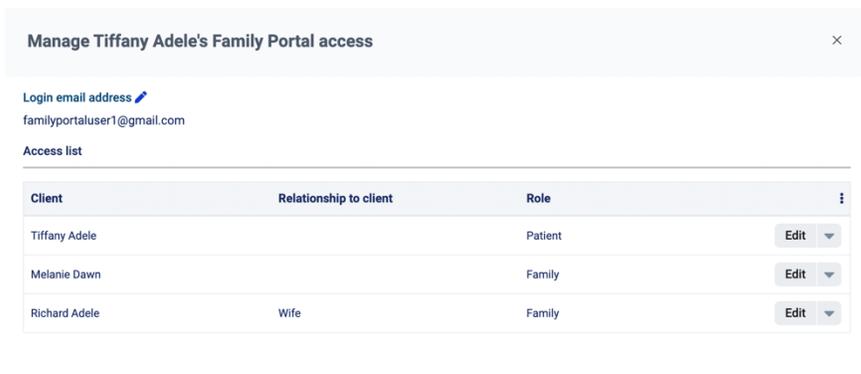
2 Managing Family Portal Access for Clients:

You can also manage the client's family portal access.



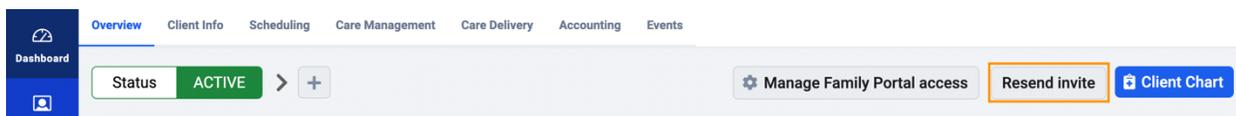
Click on **Manage Family Portal Access** on the client's overview page.

If the client has access to any other family portal accounts, besides their own, they will be listed here.



By clicking on the dropdown arrow, you can **remove the client's access**, **edit their role**, or **edit their email address**.

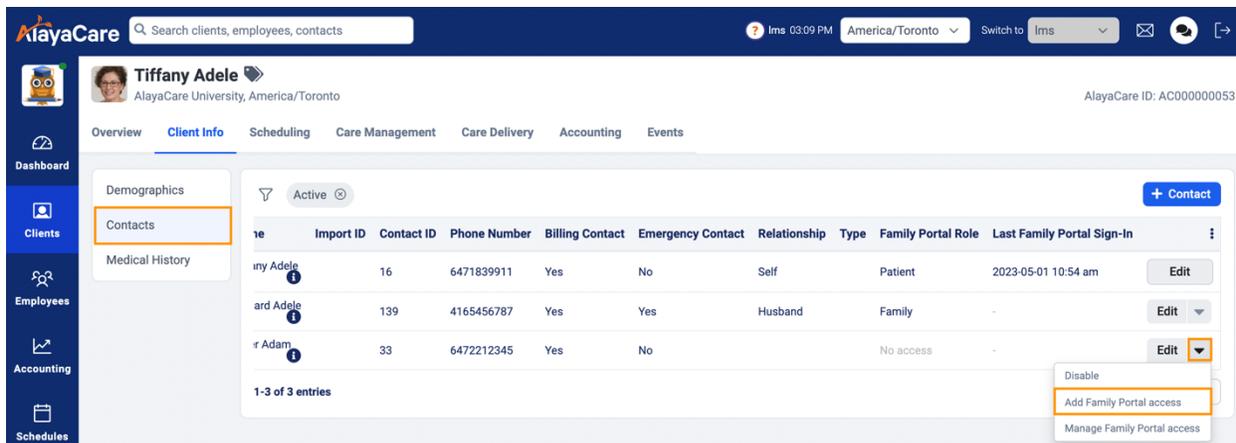
If the invite needs to be **resent**, you can do so by clicking on the **"resent invite"** button from the client's profile. Once the client has logged in for the first time, the resend invite button will no longer be available as they have already been able to successfully access their profile.



Granting and Managing Family Portal Access For Client Contacts

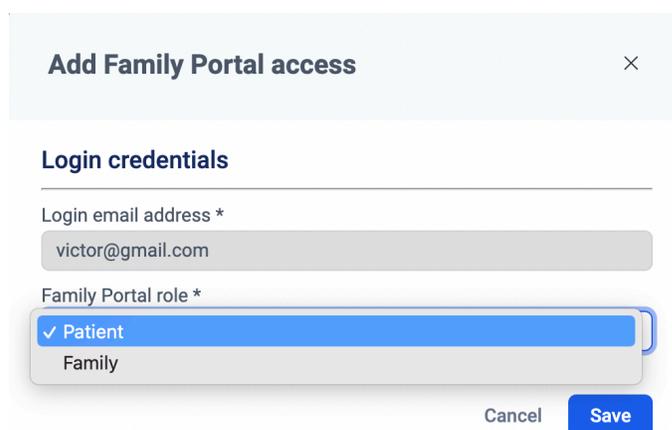
1 Granting Family Portal Access for Client Contacts: To provide a client's contact with family portal access they must first be a contact on the client's profile.

To provide family portal access to a contact on the list, **click the dropdown arrow** and select **"add family portal access"**. This option will only be available for contacts that do not yet have family portal access.



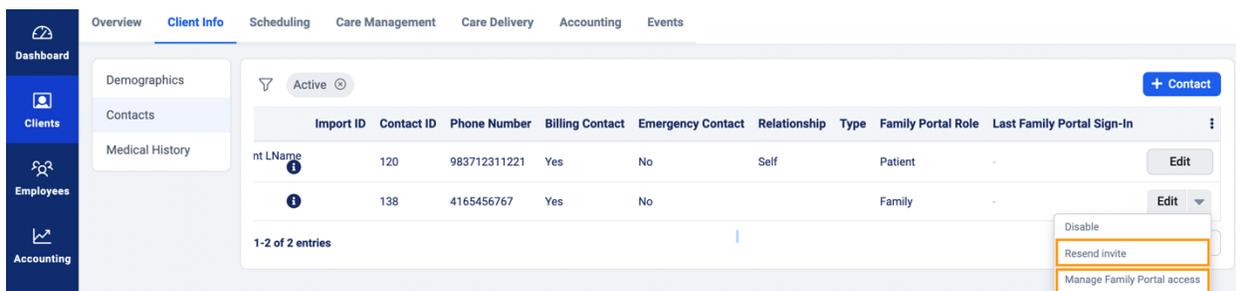
In the resulting dialogue you will be able to assign the user their family portal login credentials.

Enter the **email address** you wish to send the access invitation to. If the contact already has an email in their info section, the email will be automatically populated. If you wish to change it, you must do so from the contact's information page.



Select the **role** you would like to assign for this contact. Click **save** when complete. An **email invitation** will be sent to the contacts email address detailing their **login information**. A link to access the family portal, their **username** and a **temporary password** will be included in the information.

From the dropdown, a button called **“resend invite”** will be available in case the contact needs the invite email to be sent to them again. This will only be available for contacts that have **not logged into the family portal**.



2 Managing Family Portal Access for Client Contacts:

You can **manage the contacts family portal access**. By clicking on this button, you can edit the contacts **email address**, edit their **role**, or remove the contact's **access**.

Manage Tiffany Adele's Family Portal access ×

Login email address 
familyportaluser1@gmail.com

Access list

Client	Relationship to client	Role	
Tiffany Adele		Patient	Edit 
Melanie Dawn		Family	Edit 
Richard Adele	Wife	Family	Edit 

Please note that if you wish to remove a contact from a client's contact list, that will also **revoke the client's access to the family portal**, if they currently have access.

If a client contact has been granted access to other Family Portal profiles, the other clients for which they have access will also be listed in the manage access screen.

A contact or client can be granted access to multiple client profiles on the family portal. To do so they must be **made contacts on each desired profile** and **granted access from each profile**.