

Cheat Sheet - Talking about Family Portal

Introduction

Use the following document as a baseline for your communications with clients.

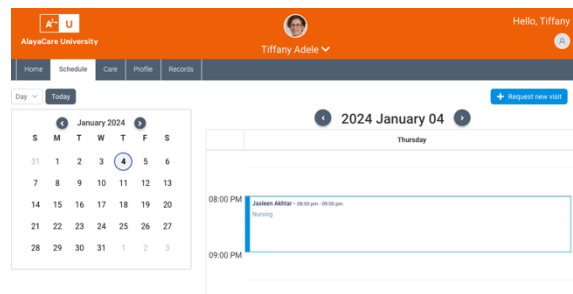
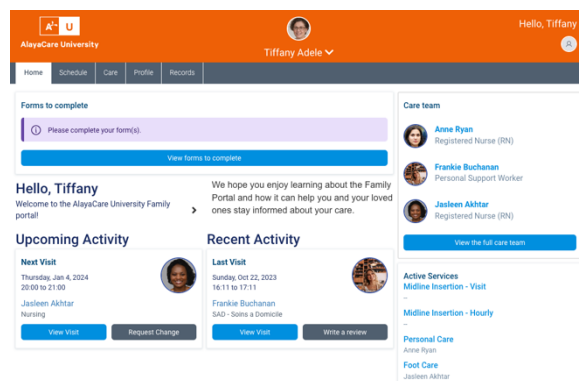
*Please **adjust the points as needed** based on your agency's specific Family Portal configuration and access you provide to users. Be aware of **spacing changes**, due to any edits you make.*

WHAT is Family Portal?

The Family Portal is a secure, integrated, online and mobile portal that provides clients, agencies and other authorized individuals access to their care schedule, parts of their AlayaCare health records, invoices, and secure messaging communication with caregivers to stay connected and engaged in their care plan anywhere, at any time.

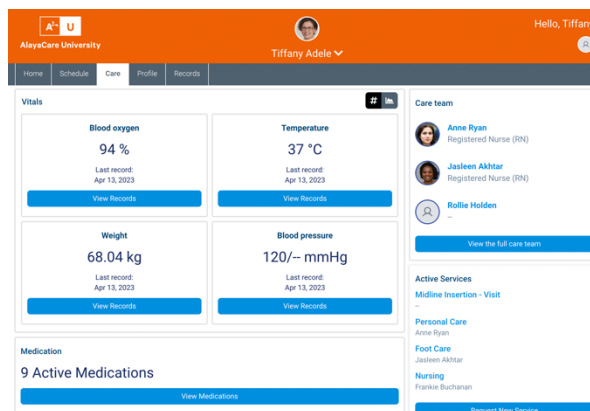
What clients can access on the Family Portal:

- ✓ Home Dashboard
 - View upcoming and recent visits
 - View Care Team
 - View Active Services
 - Request New Services
 - Cancel or request a change to an upcoming visit
 - Write a review for a member of care team
 - Forms
- ✓ Schedule
 - 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)



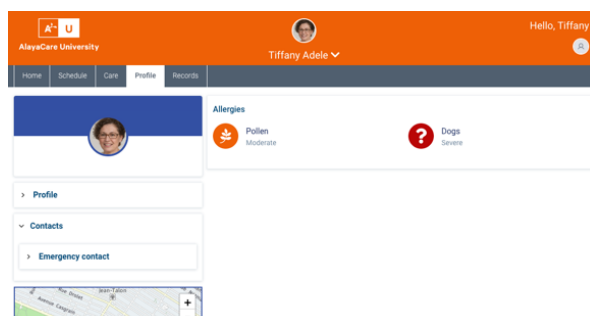
✓ Care Tab

- Vital Readings
- Medications
- Care Team
- Active Services



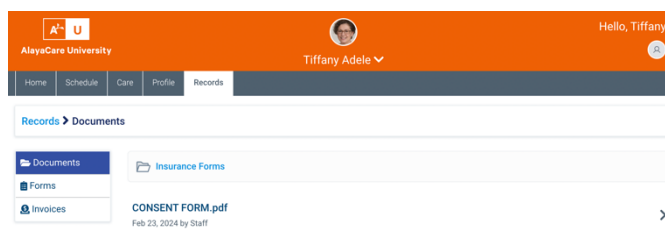
✓ Profile Tab

- Allergies
- Client Demographic Info
- Emergency Contact Info



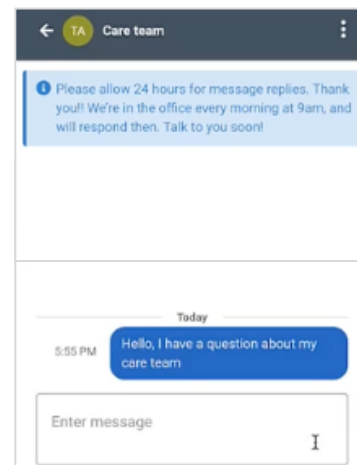
✓ Records Tab

- Documents
- Forms
- View Invoices
- *Pay Invoices
 - *Only if your agency has **Payment Gateway** enabled



✓ Secure Messaging

- Secure messaging allows users to communicate in real time and have two-way conversations with individuals from the agency using the Family Portal.
 - Direct Messages
 - Group Messages
 - Receive Attachments sent by the agency



WHO can be a Family Portal User?

Anyone! Family Portal users are typically the client or the client's family member/caregiver. However, anyone can be given contact. They just need to be added as a contact on the client's profile and provided access. For instance, in some cases a physician may want or need access to a client's Family Portal and that can be set up easily.

- ✔ Let clients know anyone they would like to have access to their Family Portal can have access
- ✔ The user (the client or client's contact) will receive an email once they have been granted access to the Family Portal with instructions detailing their login information and how to get started.

WHEN/WHERE can Family Portal be Used?

- ✔ Family Portal can be used on the web from home, or users can take advantage of the dedicated Family Portal mobile app to use it on the go. The Family Portal can be accessed at any time.
- ✔ The mobile app can be downloaded on iOS and Android via the App and Play stores.

WHY use the Family Portal?

- ✔ Allow clients and other authorized users to access information on their care easily and when they want
- ✔ Empower Family Portal users to be engaged and active members of their care
- ✔ Increase overall transparency and connectedness

Main Feature Benefits for Users of the Family Portal

- ✔ Request new services instead of calling the agency
- ✔ Request additional or recurring visits without calling the agency
- ✔ Cancel or request a date/time adjustment to a visit without calling the agency
- ✔ Complete forms online
- ✔ View past visits and provide feedback on the caregiver to the agency
- ✔ View the schedule to remind themselves of upcoming visits without needing to call the agency
- ✔ If using Secure Messaging, users can communicate with the agency via secure messaging using pre-selected topics to guide client inquiries which directs them to their agency approved care team on their selected topic

- ✓ If using Secure Messaging, users can receive messages from the agency including document/photo attachments to enhance care communication
- ✓ If using Payment Gateway, users can pay patient invoices easily using the Family Portal

