

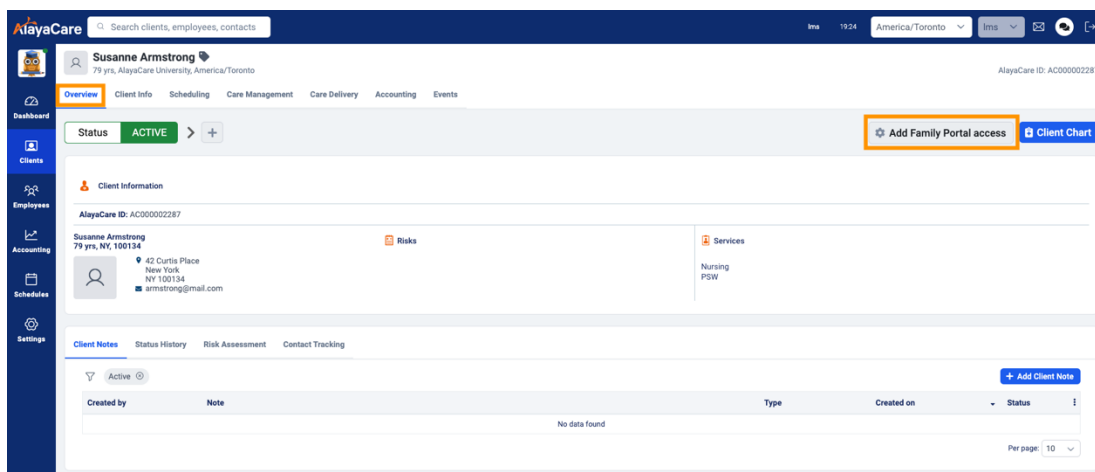
Family Portal – Granting Access

Introduction

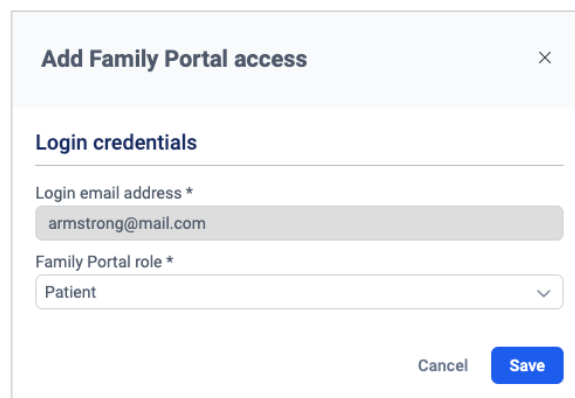
Use the following document as a baseline for your communications with your team to explain and understand how to grant access to the Family Portal for clients and client contacts. *Please adjust the points as needed based on your agency's specific Family Portal configuration and access you provide to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

Granting Client's Family Portal Access

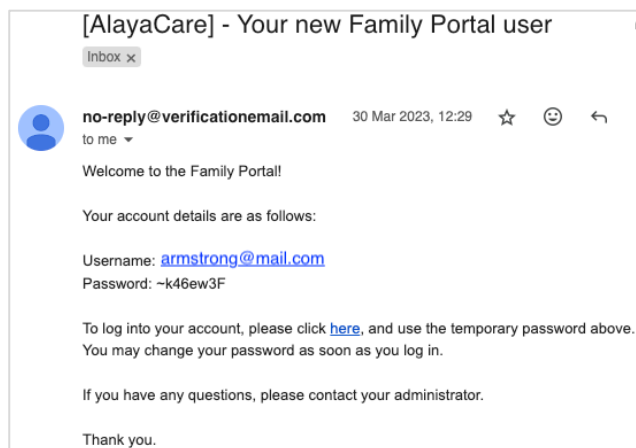
- 1) Navigate to the client's profile
- 2) Select the **overview** tab
- 3) In the top right corner, click on "Add Family Portal Access"



- 4) In the resulting dialogue you will:
 - a. 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.
 - b. Select a Family Portal role type

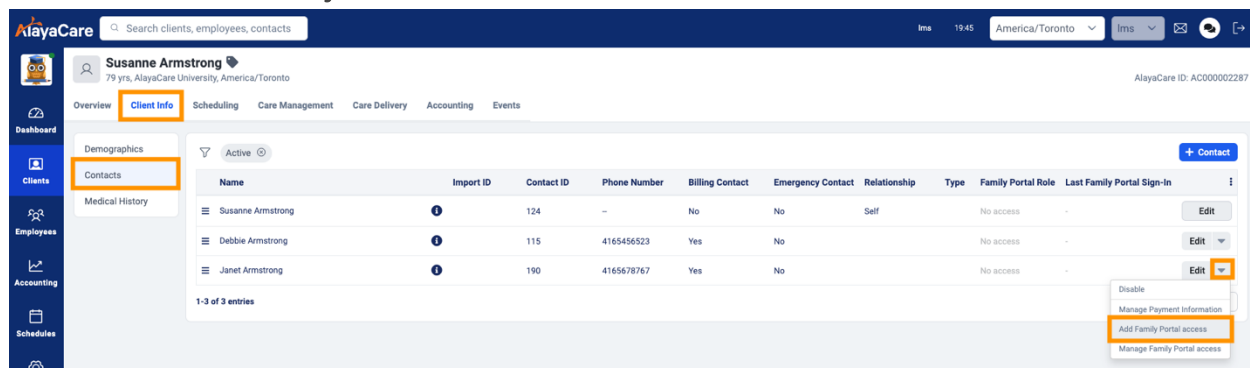


- 5) Click **Save**.
 - a. Once you click save, an email will automatically be sent to the users email address with their username and temporary password along with a link to the Family Portal site.
 - i. Upon initial login the user can change their password



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
 - a. If they do not, they must be created first
- 5) Select the **dropdown arrow** beside view
- 6) Click "Add Family Portal Access"



- 7) In the resulting dialogue, the email displayed will be their username associated with their family portal account login.
 - a. 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**
 - a. An email will automatically be sent to their email address with their login details and a link to the Family Portal site
 - i. Upon Initial login the user is prompted to change their password

Managing Family Portal Access

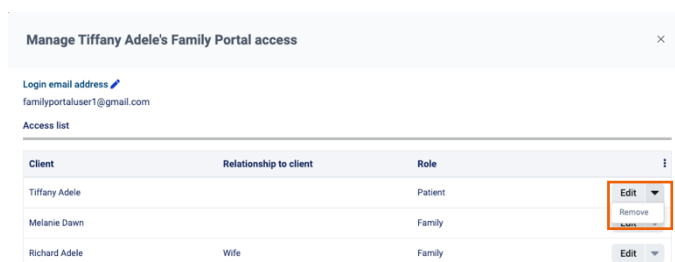
If changes to the role type of the user or other edits need to be made, you can manage a client or client contact's family portal access as well as remove access.

To manage a client's Family Portal Access:

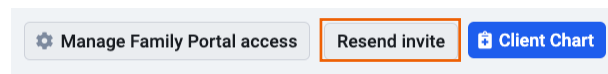
- 1) Navigate to the client's **profile > overview** tab
- 2) In the top right corner select **"Manage family portal access"**



- 3) Edit or remove access as needed.

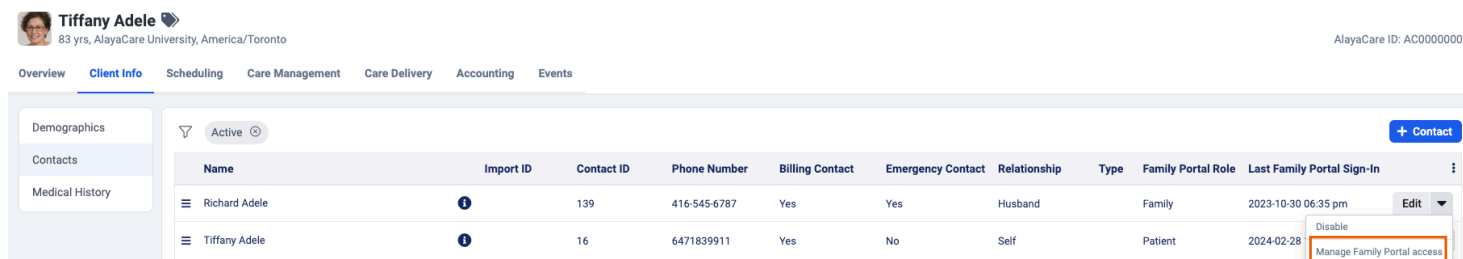


- 4) If a client has never logged in, you will see the option to resend the invite to them.

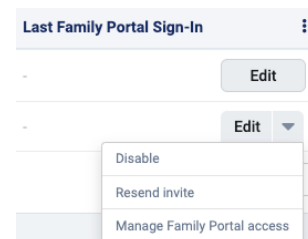


To manage a client contacts Family Portal Access:

- 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"**



- 3) Edit or remove access as needed
- 4) 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
- ✓ 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