Client Portal – Parent/Guardian

The Client Portal provides clients with an easy and convenient way to access their account information. Appointments, Messages, MyHealth and agency-specific forms can be viewed and managed within the Client Portal. The Forms feature works in conjunction with the pre-existing Echo Informs feature.

Families! You are welcome to access the reference video on this process through the link provided here.

**Please note, EchoVantage does not natively support cell phone sized screens and is intended to be accessed via a computer or tablet. Should cell phone access be the only option available, please utilize landscape mode on your phone for the best possible experience within the given system limitations. **

Exciting News About Your Care Team and the Client Portal Pilot!

Your care team is currently participating in a Client Portal Pilot! This initiative is in a testing phase with a limited rollout, allowing us to gather valuable feedback before making it available to all families.

Your Feedback Matters! We greatly appreciate your insights during this process. Please feel free to share your experiences with your care team as we navigate this journey together. Your feedback will be instrumental in helping us refine the portal and ensure it meets the needs of all families.

Pilot Overview: The pilot will run for 90 days, during which we will evaluate the portal's effectiveness and identify any specific issues that need addressing before a wider rollout.

Participating Teams: The following teams are involved in this pilot:

- Intensive In-Home (IIH)
- Outpatient Services
- Assertive Community Treatment Team (ACTT)
- Day Treatment
- Therapeutic Aide Support and Knowledge (TASK)
- School-Based Therapy

Together, we aim to create a Client Portal that benefits everyone involved. Thank you for being a part of this important process!

Benefits!

We are excited to share some fantastic benefits of the Client Portal designed especially for you and your family!

- **Convenient Appointment Scheduling**: The Client Portal allows you to request appointments with your child's care team at any time that fits your schedule, even outside standard business hours. This flexibility ensures you can reach out whenever it's most convenient for you. Staff will respond during normal business hours to confirm your appointments, and you can easily check the portal to view your upcoming appointments.
- **Easy Communication**: If you have non-urgent questions for your child's care team, you can send messages through the Client Portal whenever they come to mind. This feature supports ongoing communication, allowing you to connect with staff in a way that accommodates both your and their schedules.
- **Stay Updated**: We encourage you to check the portal regularly for updates after reaching out to your child's care team, ideally at least once every 24 hours. This ensures you stay informed and engaged in your child's care.

We're here to support you and your family, making it easier to connect and collaborate with your child's care team!

Accessing Your Information through the Client Portal

The Client Portal offers you a simple and convenient way to access your account information. Within the portal, you can easily view and manage:

- **Appointments:** Check your upcoming appointments and request new ones.
- **Messages:** Communicate with your care team at your convenience.
- **MyHealth:** Access important health information.
- **Forms:** Complete agency-specific forms, which work alongside the existing Echo Inform system. This feature serves as a valuable engagement tool between care providers and families.

Important Note: The Client Portal is NOT intended for any crisis needs. If you are experiencing a crisis, please contact your care team directly or seek emergency assistance.

EchoVantage Client Portal Service Availability Notice

Please be advised that our client portal messaging system should never be used for emergency communications or urgent requests. It is operational for non-urgent communication during regular business hours, from 9:00am to 5:00pm, Monday through Friday. Outside of these hours, responses may be delayed. For immediate support during non-business hours or in case of an emergency, please reference the client's crisis plan and call the crisis number(s) listed. The identified crisis contacts in your crisis plan are equipped to offer timely support and assistance when our regular business hours are not in effect.

Important: If you are experiencing a life-threatening emergency, please call 911 or visit the nearest emergency room

Important Information About Notifications in the Client Portal

Please note that the Client Portal **does not send direct notifications** to users when responses are sent. Similarly, staff do not receive external alerts for messages received through the Echo system.

As a result, your care team will reach out to you directly via phone or text to let you know when a response has been sent. We encourage you to check the portal regularly for updates and communications.

Your care team aims to respond to all Client Portal requests within 24 hours, so it's important to monitor your messages to stay informed.

Thank you for your understanding!

Consent for Client Portal

Before you can access the Client Portal, a Consent for Client Portal form must be completed. This form needs to be submitted either prior to gaining access or during the intake process.

How to Setup Client Portal Account for Access – One Time Only

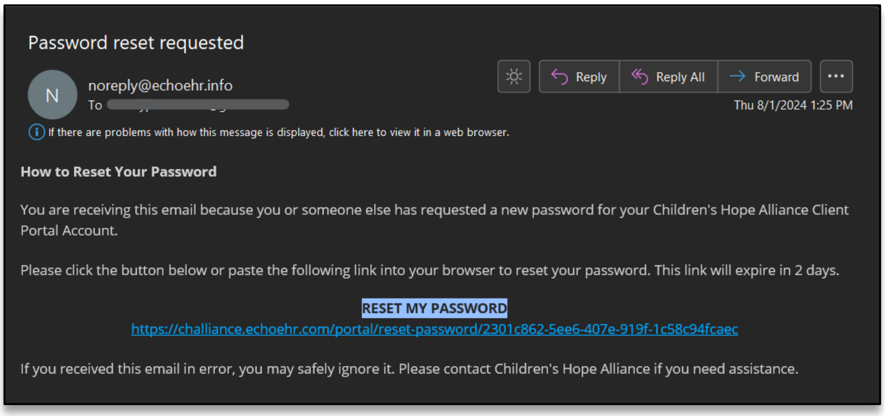
*Important Information for Accessing the Client Portal

To access the Client Portal, a Consent for Client Portal form is required. CHA Staff must also set up your account before you can gain access.

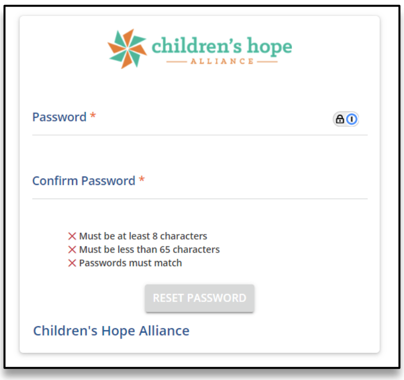
- **Email Access**: Please note that only one email address can be associated with the portal account. If there are multiple adults in the household, staff will need to choose which email to use. If you have a shared family email, that would be a great option.
- The person granted access should be the adult who is most involved in the client's day-to-day care, such as a foster parent, parent, or legal guardian.

NOTE: CHA Staff will need to complete prior set-up within the client chart prior to receiving access. If you have not received the email referenced below, please reach out directly to your care team. Once the email has been received:

- You will receive an email asking for you to reset your password. <u>This is how your initial password is set up.</u>
    - **Access Users will only receive this notification one time, and the email will expire within 2 days of receipt**. Staff should follow up with you to ensure that account creation has been completed within the designated timeframe.



- Portal Access Users will need to click on the link provided and then follow the prompt to set their password.



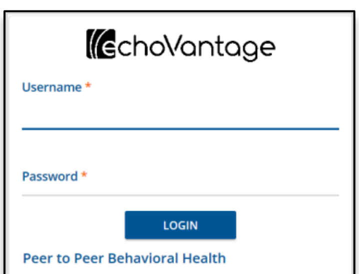
<u>Reminder:</u>

Should access users forget their login username and/or password, please reach out to your program staff for assistance. They can trigger a password reset email to be sent out and advise as to your username in the system as well as update your username.

<u>Navigating the Client Portal (EchoVantage)</u>

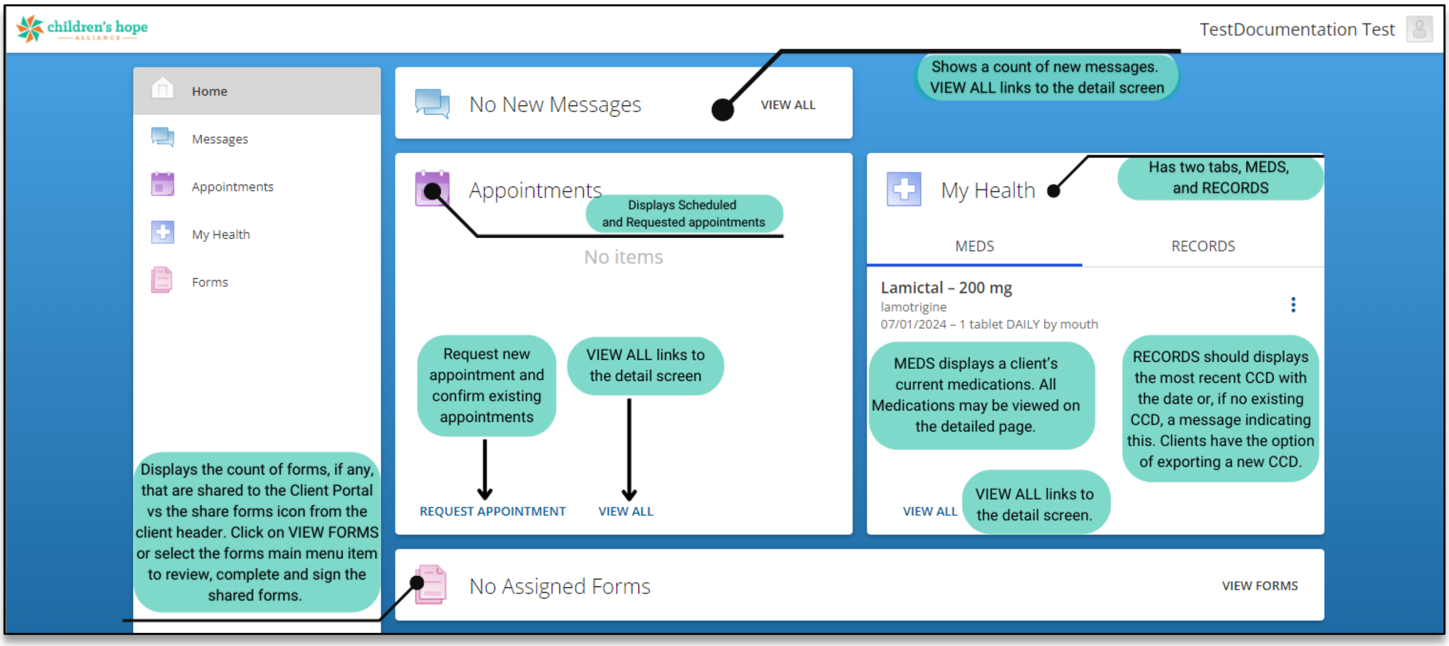
<u>Logging into the Client Portal</u>

- To access the Client Portal, enter https://challiance.echoehr.com/portal in the browsers address bar. Access users will enter their credentials established in the previous section and then click the blue *LOGIN* button.



After logging into Client Portal, the screen defaults to the Home screen. The Home screen displays divided sections with a summary of each component.

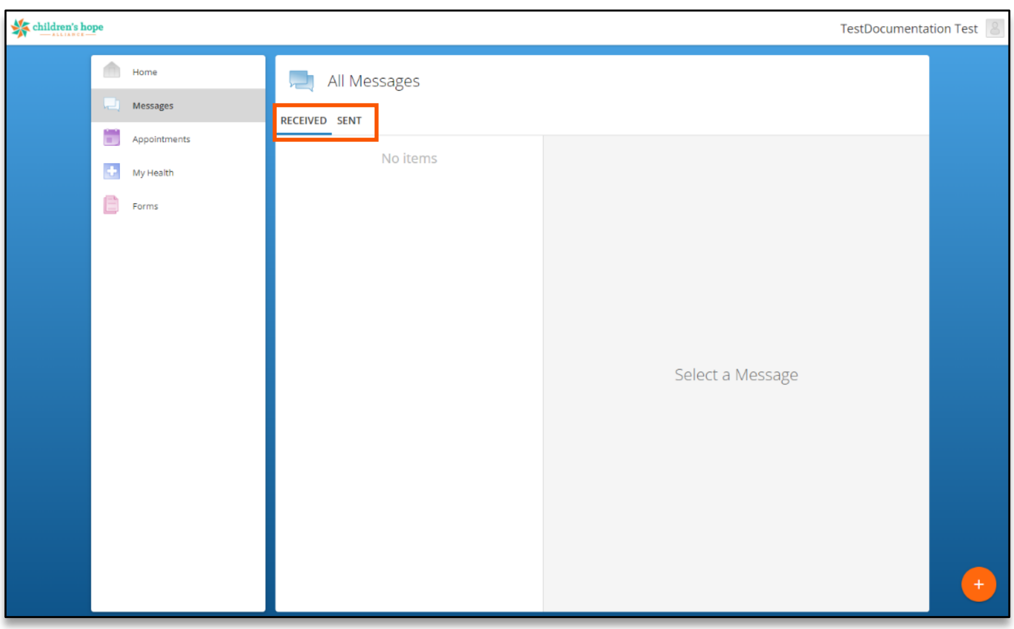
A brief description of each component follows:



Any time Portal Access Users reach out to CHA staff via the Client Portal, they should check their messages at least once every 24 hours after they reach out to a provider. **CHA Staff are expected to have a response time of 24 hours or less. Checking the portal regularly ensures that the responses are received in a timely manner. **

Messages - **REMINDER: DO NOT UTILIZE THIS FEATURE FOR ANY CRISIS NEEDS.*

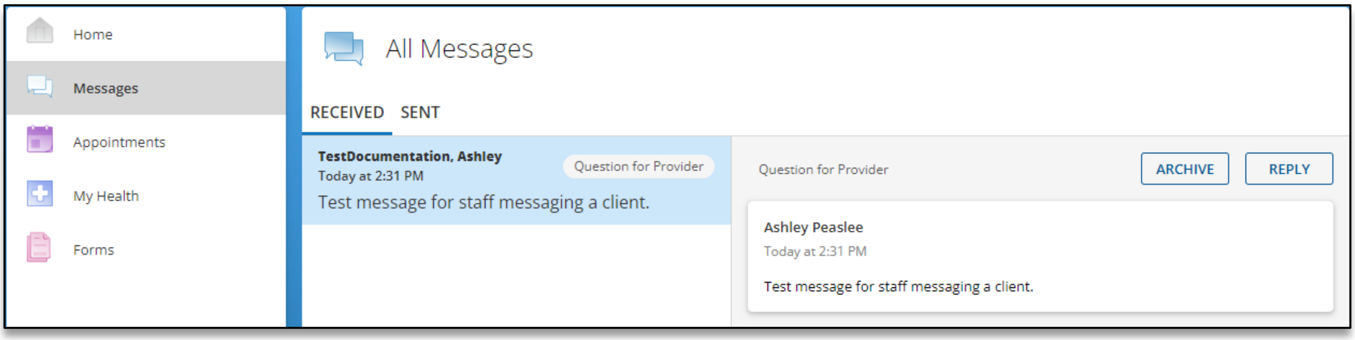
The Messages card displays a count of new direct messages, if any. Clicking on *View All* or selecting *Messages* from the left-hand menu displays the details for All Messages.



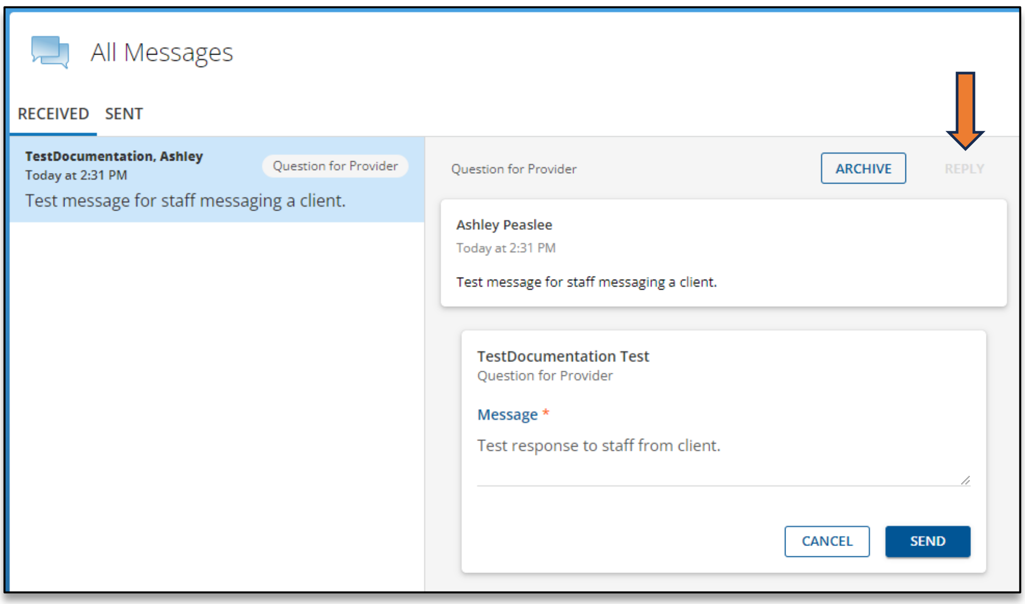
Messages are divided into two tabs, *RECEIVED* and *SENT.* These messages are direct messages between the Group Mailboxes configured in EchoVantage and the Client Portal. *Messages do not use Staff or Client email addresses.* Navigating and interacting with the messages is the same in both tabs.

- A card displays for each message with summary information.
    - The first names of the sender and recipient are listed in bold.
    - The date and time the message was sent or received displays beneath the names.
    - The predefined message subject is listed to the right with a gray background.
    - A preview of the message body shows beneath the date and time.

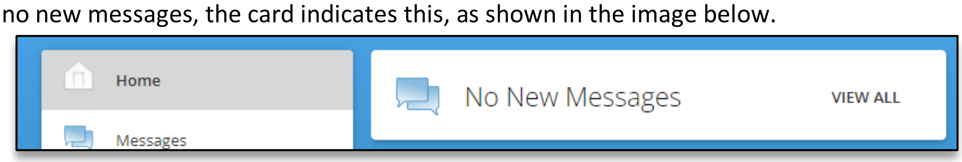
- Click anywhere on the message card to view the full details.



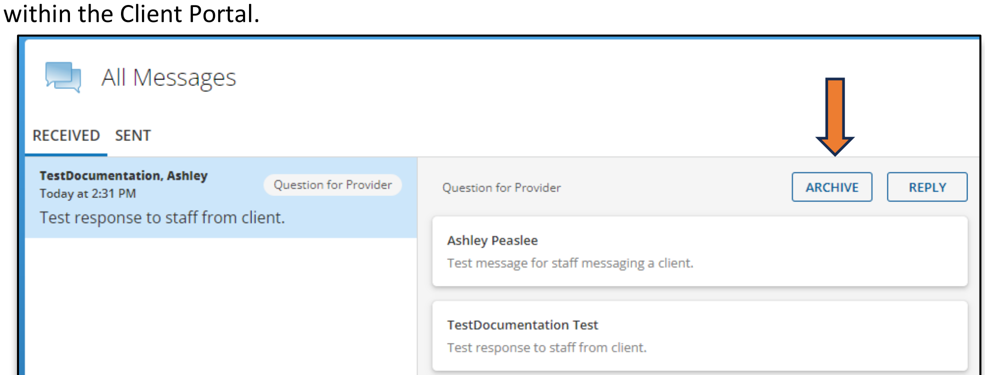
- The full message displays in the right-hand pane.
- Select the *REPLY* button to respond to the email.
  - A card displays beneath the original message.



  - Enter the response text in the required *Message* field.
  - Select *SEND* to complete the reply.
  - The message is automatically routed to the original message Group Mailbox.
- After new messages are viewed, the New Messages count is updated (after a polling interval) on the home screen. If there are no new messages, the card indicates this, as shown in the image below.



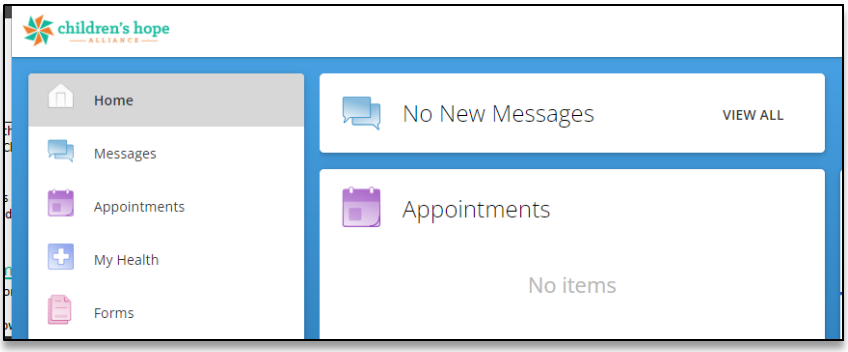
- Select the *ARCHIVE* button to remove the message from the list permanently. Archived messages cannot be recovered from within the Client Portal.



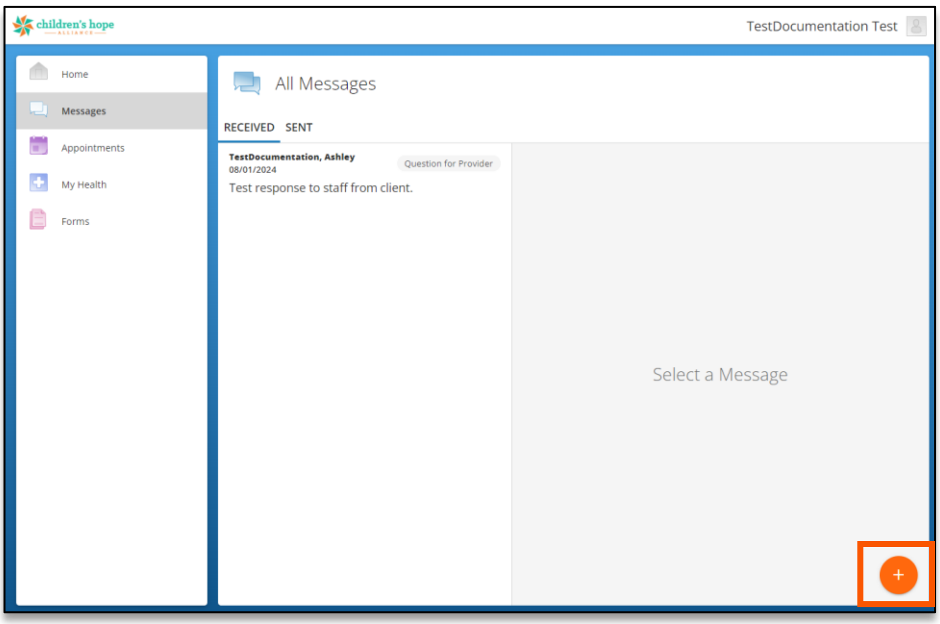
Initiating Message to Care Team

Should users need to start a message to their treatment team instead of responding to one previously created, follow the steps provided below.

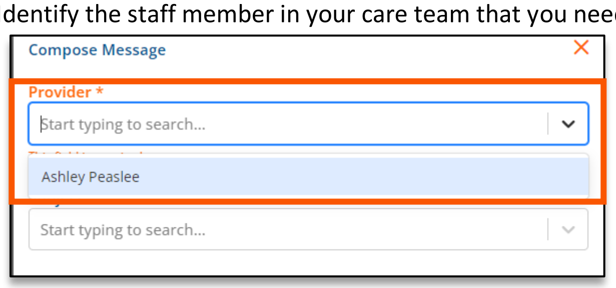
- From the Portal Home Page, click on "View All" in the Messages section.



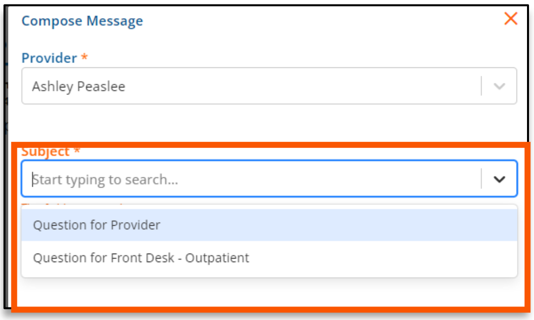
- Click the orange plus symbol in the bottom right-hand corner to start a new message.



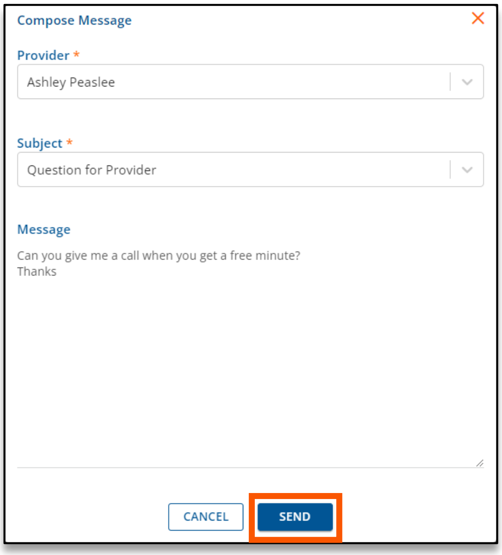
- Identify the staff member in your care team that you need to communicate with.



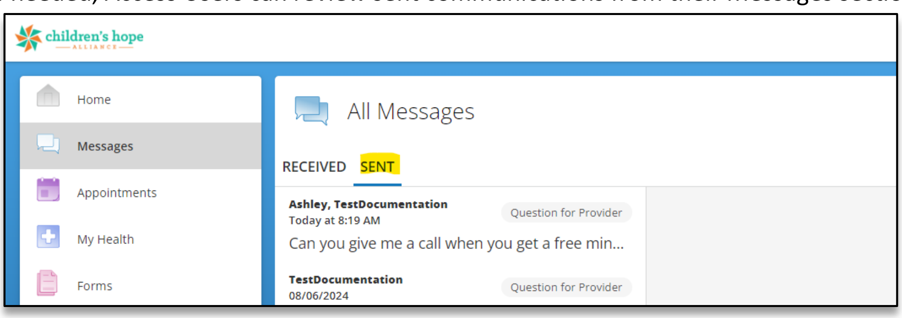
- For most purposes, select "Question for Provider" as the subject. If the communication is specific to scheduling, select "Question for Front Desk – Outpatient".



- Type out your message to staff and then click the blue send button.

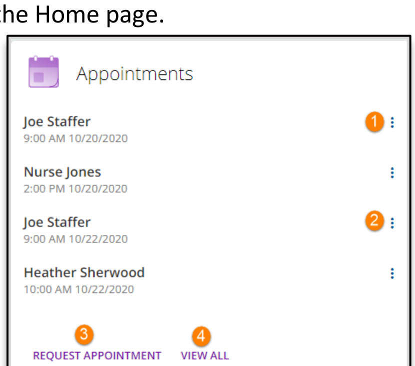


- If needed, Access Users can review sent communications from their Messages section, within the "Sent" tab.

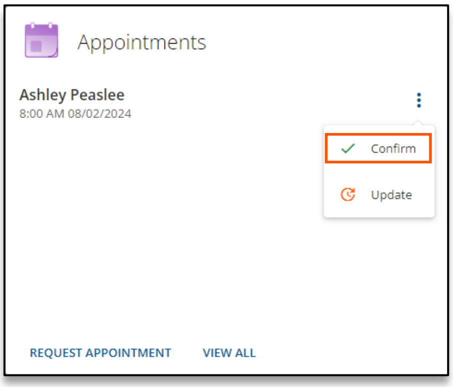


Appointments

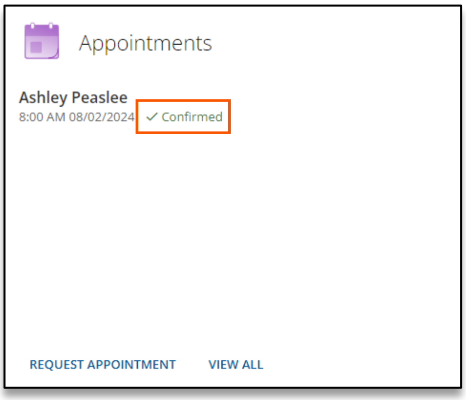
The *Appointments* summary card displays any scheduled or requested appointments. Clicking on an appointment opens the details of that appointment on the scheduled tab of the details screen. Several additional actions are available from the summary card on the Home page.

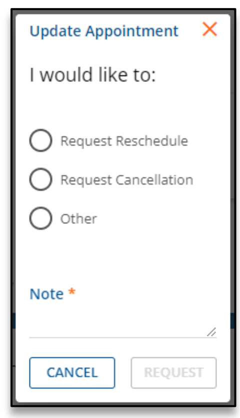


- When the current time is within 48 hours of the scheduled appointment, options are available to Confirm or Update the appointment.
    - To confirm an appointment, click on the ellipsis (three vertical dots) and click *Confirm.*

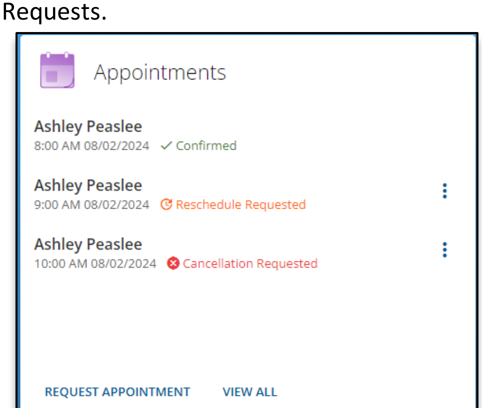


    - An indicator displays on the summary card for confirmed appointments.

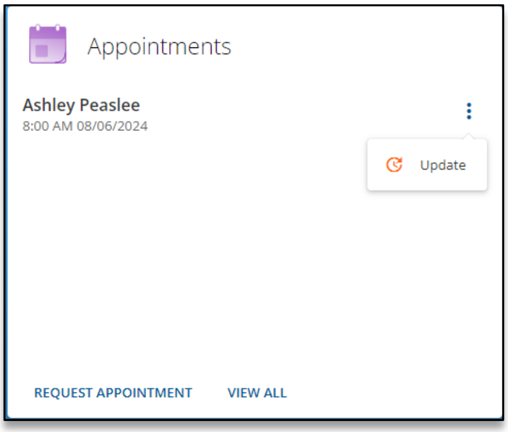




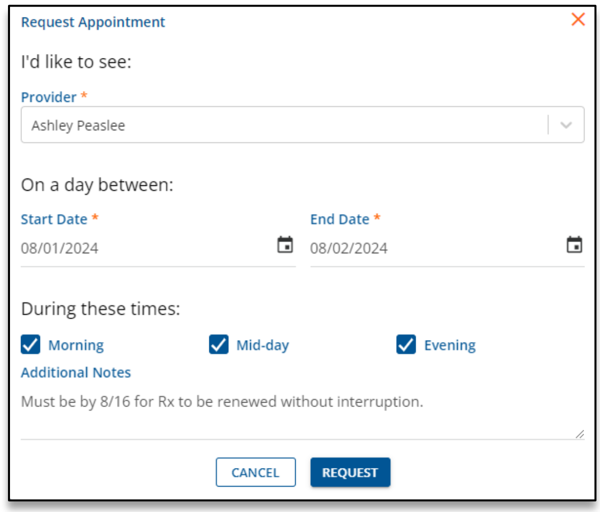
- To update an appointment, select the Update action after clicking on the ellipsis.
    - An *Update Appointment* box displays like the image below.
    - One of the three update reasons must be selected, and a message in the *Note* section is required.
- Upon clicking REQUEST, the update reason is indicated on the summary unless *Other* was selected. The request is also sent to the Group Mailbox configured to receive Appointment Requests.



- When the current time is more than 48 hours in advance of the appointment, only the *Update* option is available when the ellipsis is selected.

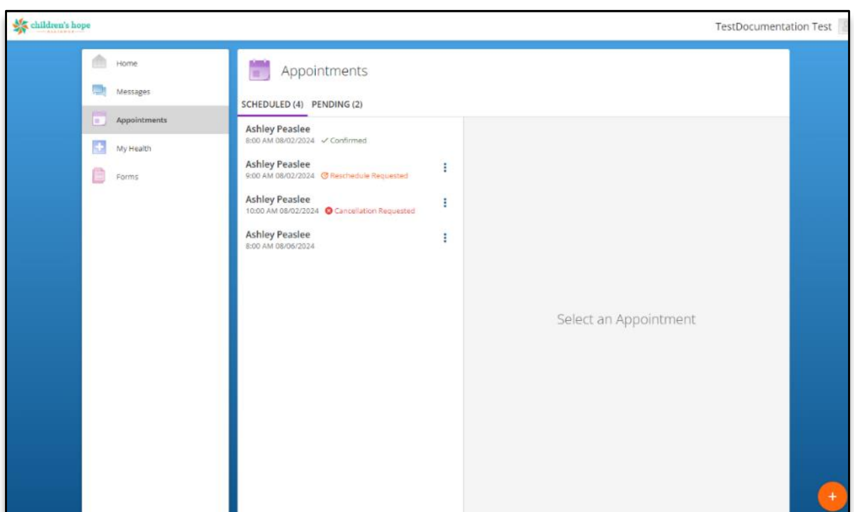


- Click on *Request Appointment* to create a new appointment request—the following screen displays.



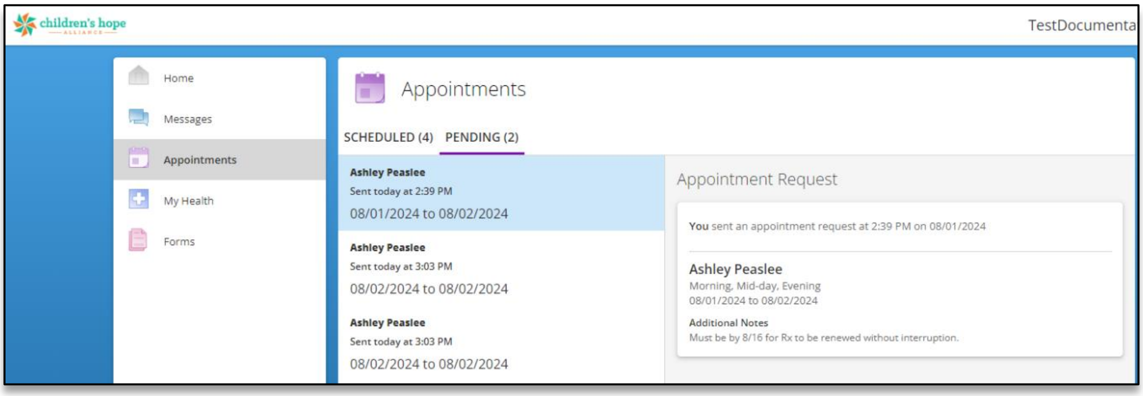
  - The *Provider* and *Start and End Dates* are required fields.
  - The time of day checkboxes and *Additional Notes* are optional fields.
  - Once *SEND* is selected,
    - The request shows in the Pending tab of the Appointments detail screen.
    - The request also shows in the Group Mailbox configured for Appointment Requests.

- Clicking on *VIEW ALL* redirects the user to the Appointments detail screen. This screen is divided into two tabs.

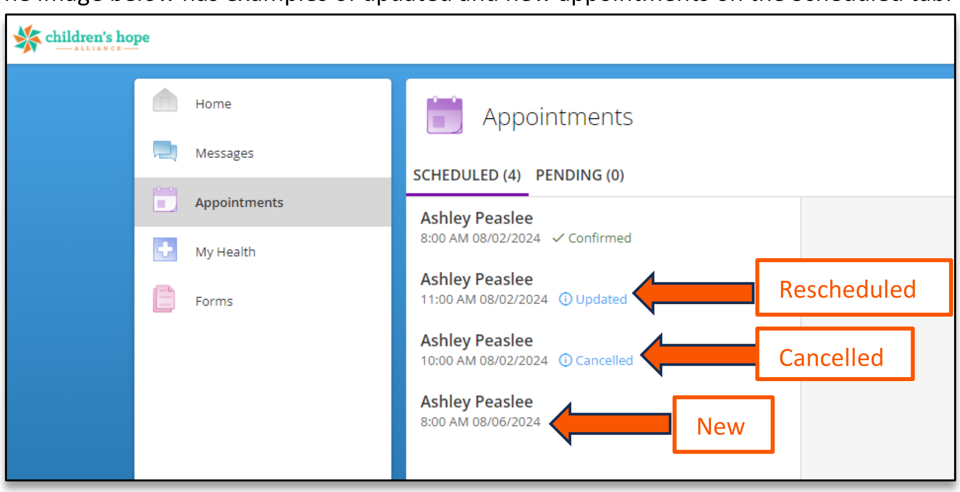


  - **SCHEDULED -** Lists all currently scheduled appointments with the current count.
    - These are the same appointments listed on the Home screen summary card.
    - The same actions are available when the ellipsis (three vertical dots) is selected - Update only if more than 48 hours in advance and Confirm if within 48 hours.
    - A new appointment can be requested by clicking on the purple plus "+" sign in the bottom right-hand corner. This displays the same Request Appointment screen covered in number 3 above.

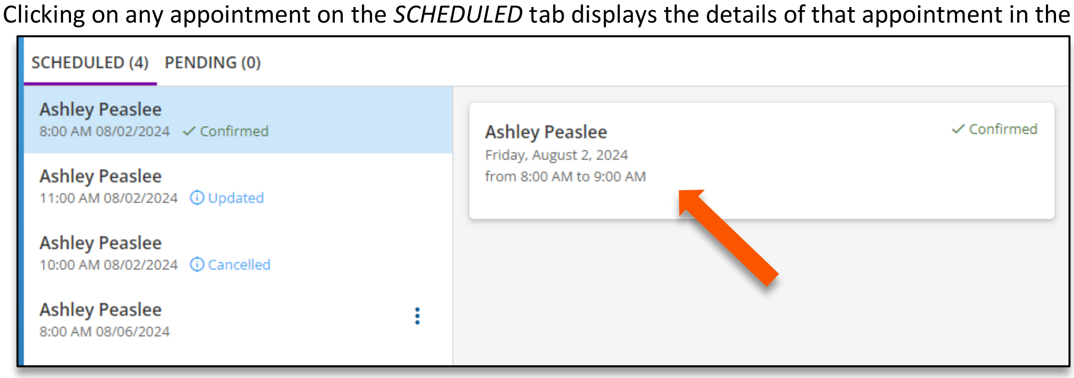
- **PENDING -** Lists any pending appointment requests and a count of new or unaddressed requests.



- This tab displays pending new appointment requests and update requests, such as a reschedule or cancellation.
- A Pending request displays in bold until it is updated in the Group Mailbox in EchoVantage, i.e., marked as Complete or Action Taken.
- After the message is updated in EchoVantage,
  - The Pending request is no longer bold.
  - The Scheduled tab is updated appropriately.
    - A new appointment was added.
    - Or an existing appointment updated or canceled.
    - The image below has examples of updated and new appointments on the Scheduled tab.



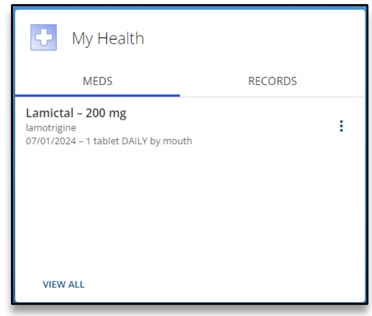
- Clicking on any appointment on the *SCHEDULED* tab displays the details of that appointment in the right-hand pane.



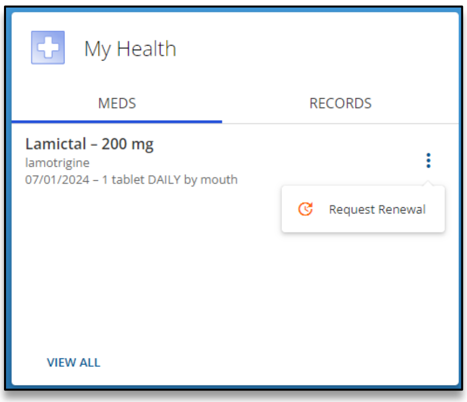
My Health

The *My Health* card on the Home screen displays both the *MEDS* and the *RECORDS* tabs.

In the *MEDS* section of the summary card:



- Only the Client's active medications are listed.
- Select *VIEW ALL* to display the *My Health* details screen.
- Click on the ellipsis (three vertical dots) to start the *Request Renewal* process and click on *Request Renewal* to display the request screen.
    - **Note**: Renewal requests for the same medication are permitted only once. Multiple renewal requests may only be submitted if each request pertains to a distinct medication.



Important Guidelines for Medication Renewals in the Client Portal

As a Client Portal user, it's crucial to select the most recent active medication entry when requesting a renewal. This helps prevent errors that can arise from choosing expired medications, especially for refills.

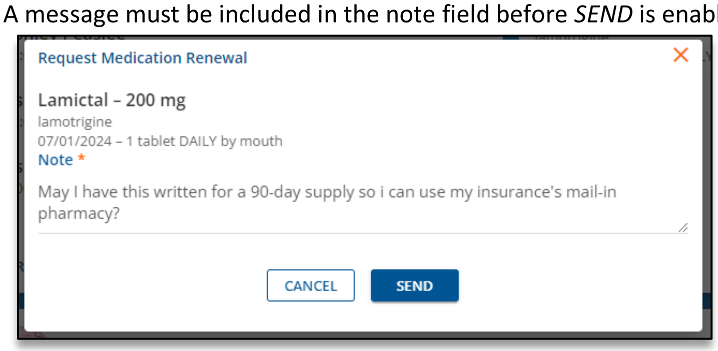
When you initiate a medication renewal, the system will show a list of all medications, including both current and expired ones. Please remember that each time a prescription is refilled, a new entry is created. It's important to verify that you are selecting the latest prescription to avoid any mistakes.

Key Points:

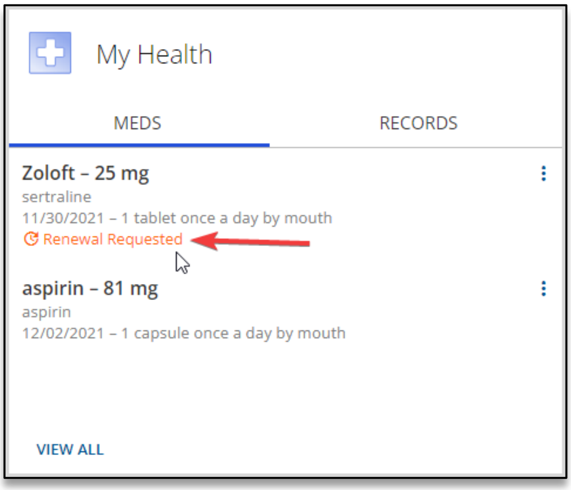
- Always check for the most recent active medication entry when requesting a renewal, particularly for refills.
- If you encounter any challenges during the medication renewal process, don't hesitate to use the messaging feature to reach out to your care team. They are here to help you navigate any issues and ensure the correct renewal.

Thank you for being proactive in managing your medications!

- A message must be included in the note field before *SEND* is enabled.

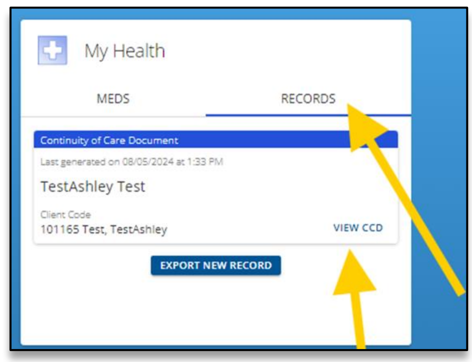


- Once sent, a *Renewal Requested* icon is displayed beneath the medication.

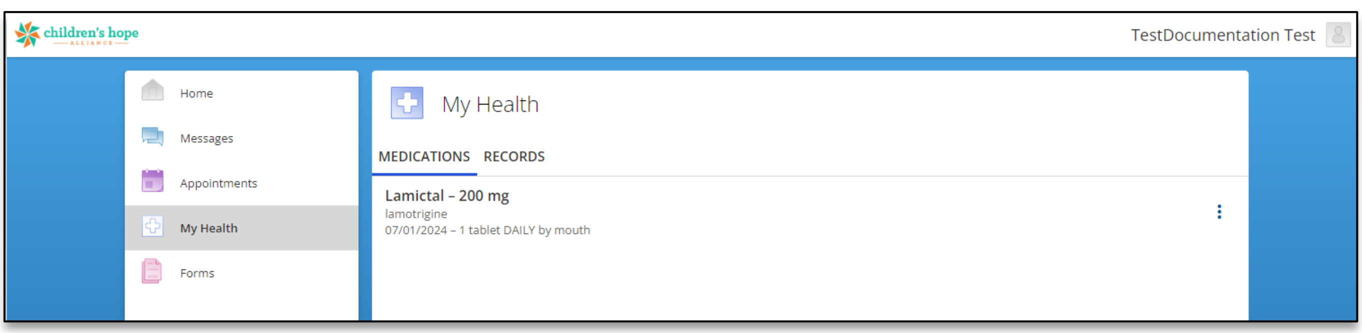


In the *RECORDS* section of the summary card,

- The most recently generated CCD, Continuity of Care Document, is displayed.
- Click on the blue *VIEW CCD* to view the full details of the Continuity of Care Document.
- A new CCD export record can be created by selecting the blue *EXPORT NEW RECORD* button.
- **NOTE**: Should the Client or Portal Access User have any questions or concerns about any of the content contained within the CCD document, they should reach out to their care team directly.

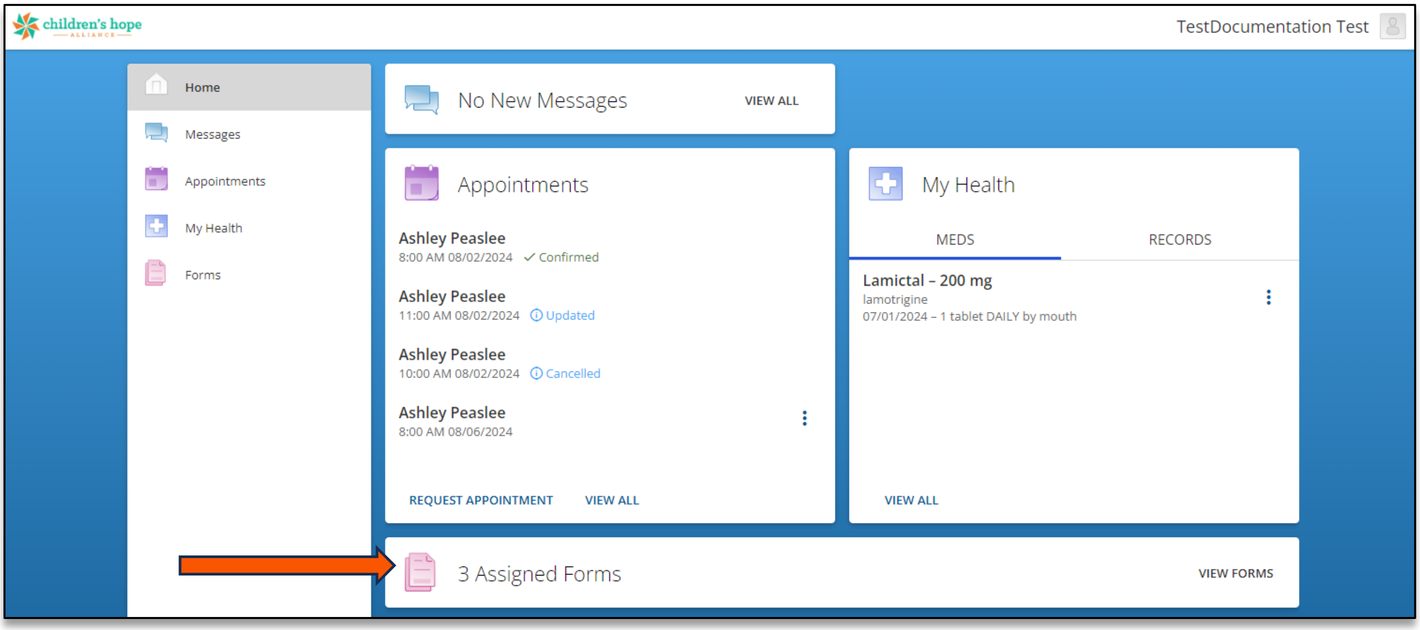


The details screen for the *My Health* menu option contains the same information and available actions as the summary screen and lists inactive medications.

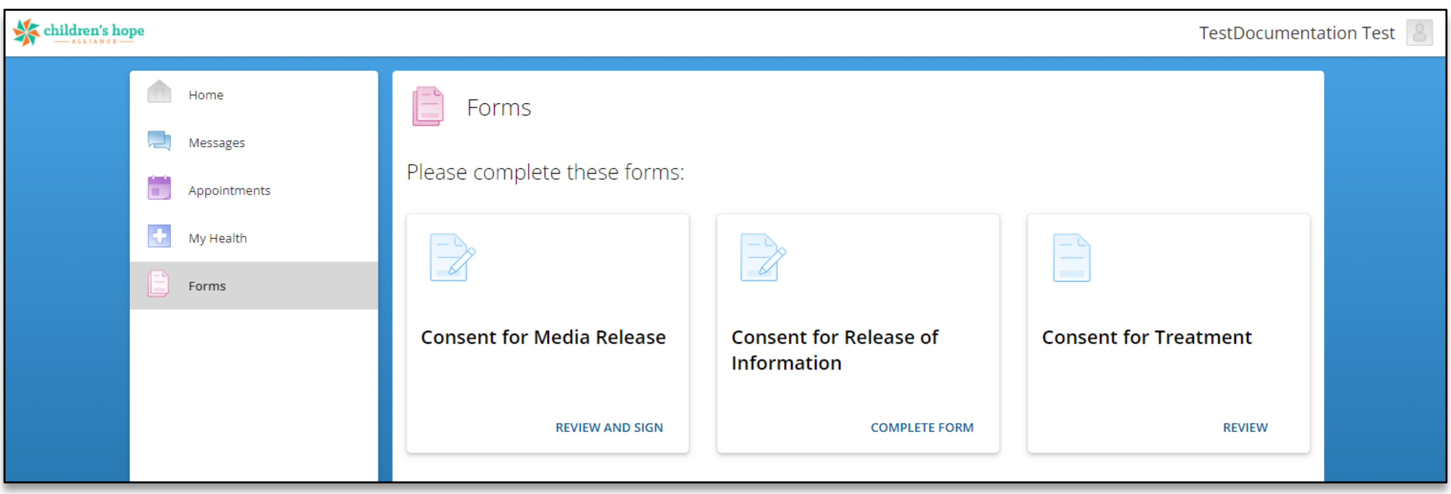


Forms within Client Portal

EchoVantage allows the sharing of forms to the Client Portal for a client to review, complete, and sign.

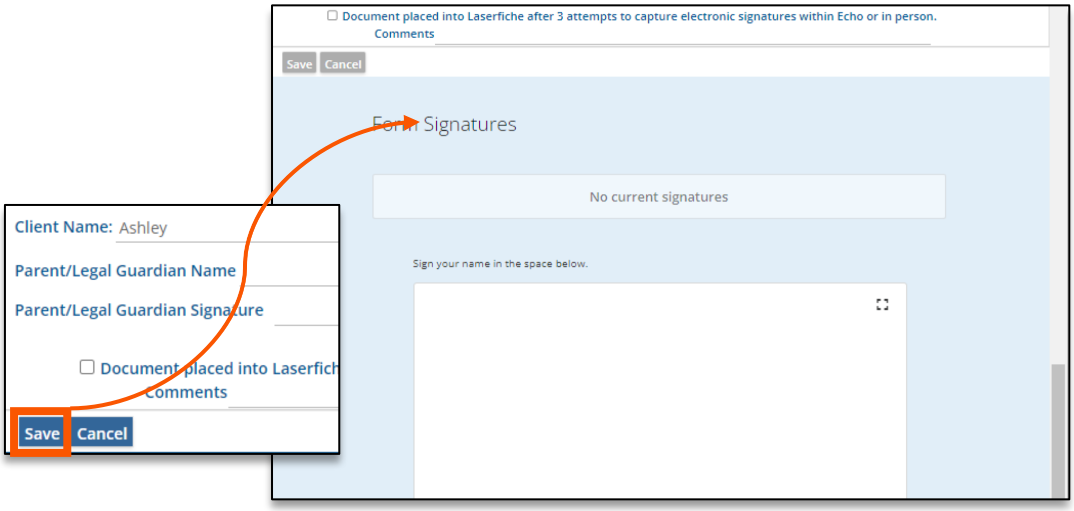


Once Forms are shared with the Client Portal Access Users by CHA Staff, they show as assigned forms on the Forms Summary card along with a count. Click on the *Forms* menu item or on *View Forms* to access the details.



- A card displays for each form that was shared to the Client Portal.
- The button in the bottom-right corner grants access to each form and also describes the expected action(s):
  - Complete Form
  - Review Form
  - Review and Sign Form.
    - *Please ensure the green Sign button is clicked to fully apply your signature. Failure to confirm the signature will result in the signature not being saved and applied.*

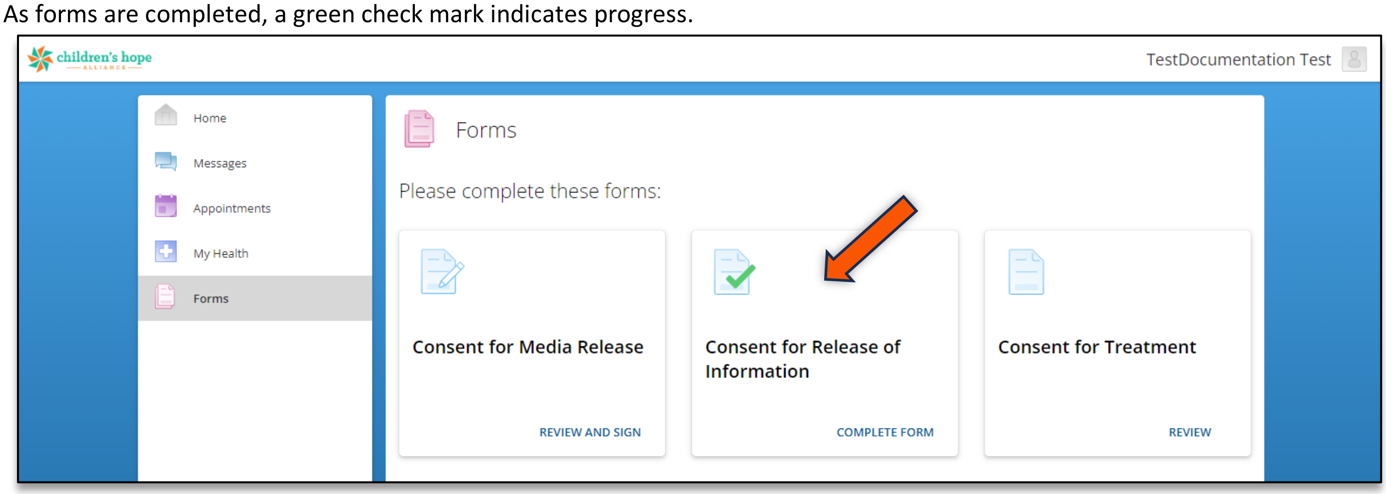
Please note: If there was data entry needed within the portal, users must click the save button before the signature section is activated. If users do not click save, the signature section will not be seen.



- Click the arrow in the top left corner to navigate back to the other forms needing to be signed.

- When all required actions are completed on a form, the action buttons, *Save* or *Cancel,* are disabled. Select the magenta left arrow at the top to return to the assigned forms.

- As forms are completed, a green check mark indicates progress.



Forms are shared with the Client Portal until they are cleared from the Share Forms feature in the Client Header on the client's chart. Once cleared, the Forms summary card returns to the *No Assigned Forms* state.

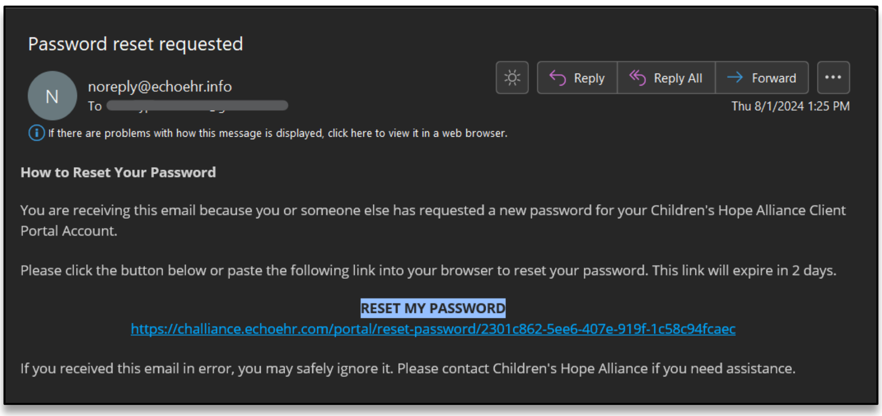
Updating Portal Access User Email Address for the Client Portal

If the Client Portal Access User needs to update the email address linked to the Client Portal, they should reach out directly to their care team. Program staff are authorized to perform the necessary updates and can also confirm which email address is currently on file for the Client Portal Access User, if needed.

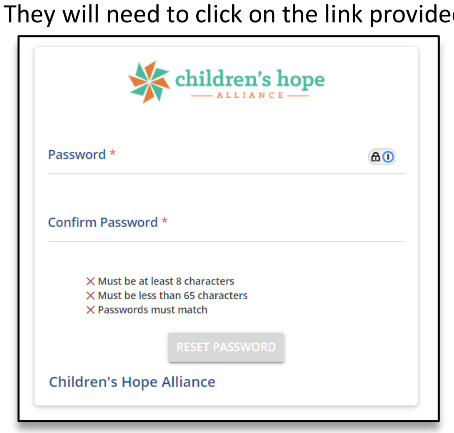
Reset Parent/Guardian Password for Client Portal

Please contact your care team directly if you need help with resetting your password. They will guide you through the necessary steps.

- The Client Portal Access User will then receive an email asking for them to reset their password.



- They will need to click on the link provided and then follow the prompt to reset their password.



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