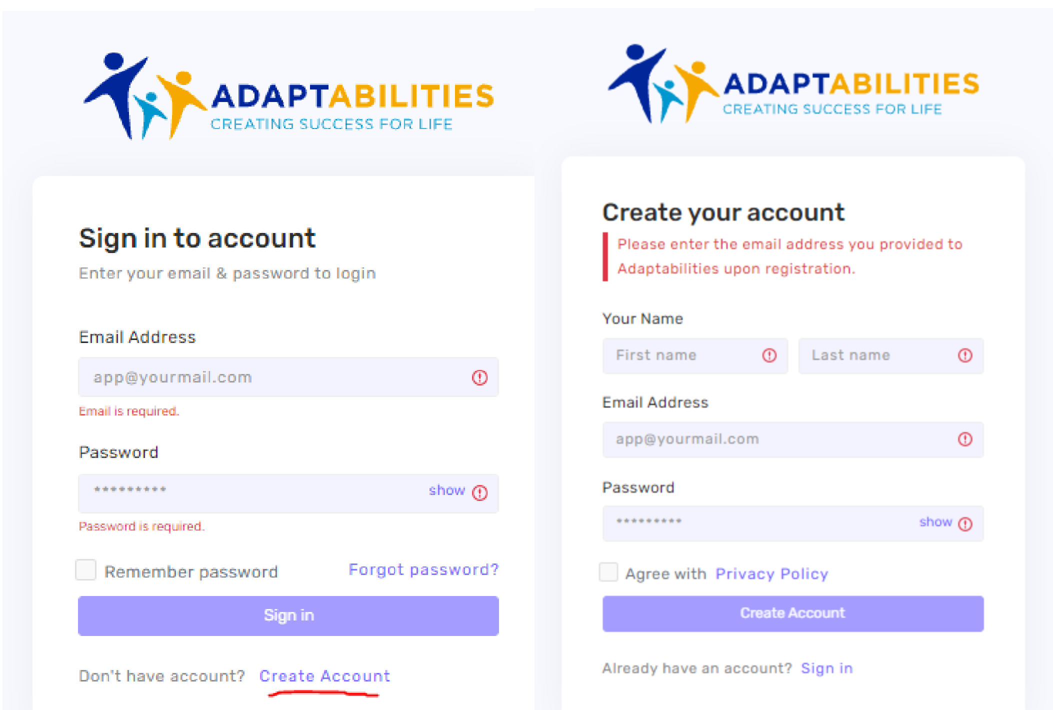
Family Portal Guide

TABLE OF CONTENTS

• compassion • belonging • capacity building • integrity • peace of mind • teamwork •

CREATING YOUR ACCOUNT

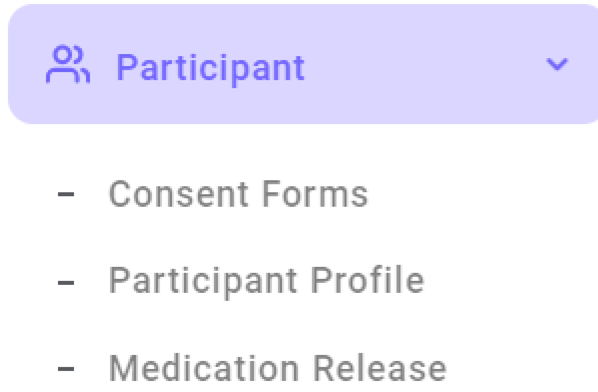
1. Go to our website, www.adaptabilities.ca and click "Log In" at the top right of the homepage, click "Create Account" if you haven't created an account yet.
2. Enter your name, email, and desired password. The email you enter must be the one belonging to the designated guardian of the participant. This email must have been previously provided to AdaptAbilities.
3. A verification email will be sent to your inbox. Open the email and activate your account.
4. Now you can log in with your credentials.



compassion • belonging • capacity building • integrity • peace of mind • teamwork

CONSENT FORMS, MEDICATION RELEASE, AND PROFILE UPDATES

Selecting the participant's name on the left-hand navigation panel will create a drop-down menu.



Consent Forms are required to be updated annually. Forms expire August 31 annually.

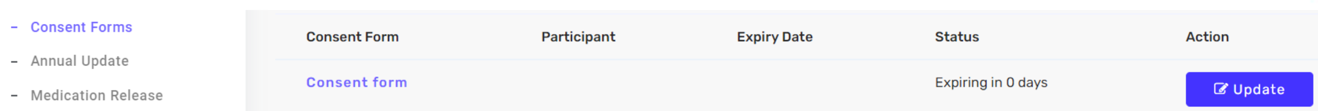
Medication Release is required if the participant requires medication during our programs. This form must be completed if there is a change in medication. Form expires August 31 annually.

New forms are available to be digitally signed on May 1st of every year. Updates to current forms can be done at any time.

Participant Profile is not required annually. This is the participant's profile and can be updated at any time. Keeping this section up to date helps our team provide the best support for the participant.

Consent Forms

The **Assumption of Risk** and **Release of Information** consent forms can be found here. You will see the current expiry date of these forms.



- Consent Forms
- Annual Update
- Medication Release

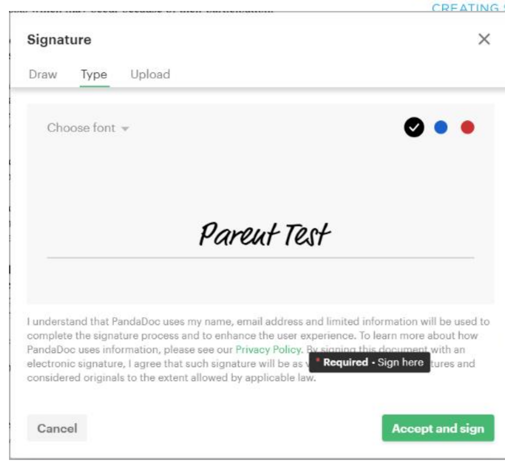
Consent Form	Participant	Expiry Date	Status	Action
Consent form			Expiring in 0 days	Update

1. Click the blue "Update" button to begin.
2. Read through the consent forms and fill in applicable information.

Note: All checkboxes need to be checked to proceed.

compassion • belonging • capacity building • integrity • peace of mind • teamwork •

3. Scroll down when the documents are loaded.
4. Two documents will appear for you to digitally sign. Both documents must be signed.
5. Click **Start** at the top of the Assumption of Risk form or go directly to the red Signature box.
6. Click the red Signature box.
7. Draw or type your signature.
8. Click “Accept and Sign”.
9. Scroll to the Release of Information consent form and click **Start** or go directly to the red Signature box.
10. Draw or type your signature.
11. Click “Accept and Sign”.
12. At the top of BOTH forms, click **Finish**.



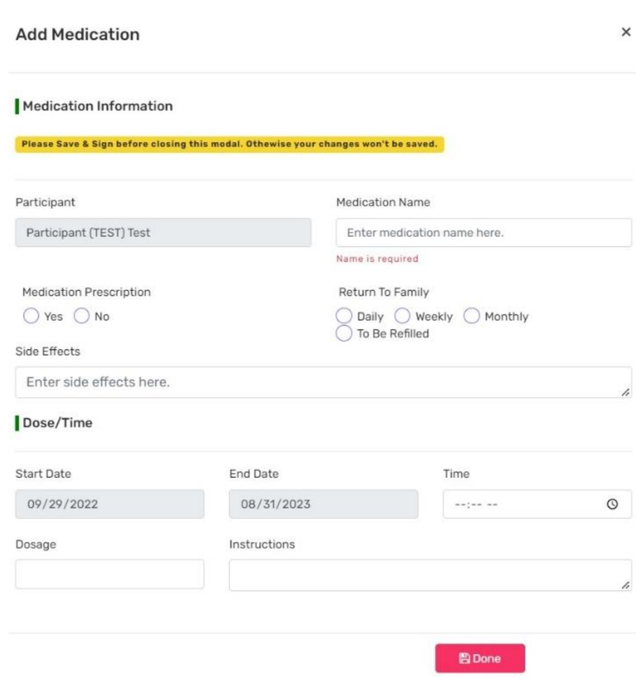
Medication Release

This section outlines the medication AdaptAbilities is permitted to administer to the participant.

If the participant <u>does not</u> require medication to be administered by AdaptAbilities, the form is not required.

If the participant <u>does</u> require medication, follow these steps:

1. Click **+ Add New**
2. Enter in the required information.
   **If medication is to be given as needed, do not enter a time and put “PRN” under instructions with criteria for administration.*
3. Click **Done**.
4. Do steps 1 to 3 for as many medications as required.
5. Type your name at the bottom and click **Submit**.
6. To remove a medication, click the trash bin icon, . You will be required to type your name at the bottom and submit.



Note: If medications change, you will be required to update the Medication Release to detail the changes prior to AdaptAbilities administering the medication.

compassion • belonging • capacity building • integrity • peace of mind • teamwork

Participant Profile Update

The Participant Profile section of the Family Portal can be updated at **any time.** Keeping this information as up to date and current as possible directly impacts how AdaptAbilities supports the participant. Our team members view participant profile information daily and use this information to meet the needs of participants.

The Participant Profile is divided into subsections for easier navigation.

Click the banner to expand the section. You can make changes to any information that needs to be updated.

Note: Please make sure your answers are from a first-person perspective.

Edit Participant

Last Updated: Jan 1, 1970

Participant & Guardian Info
Contact Information, Emergency Contacts

About Me
Interests, Strengths, Sensory Needs, Communication, Adaptive Equipment, Personal/Self Care

How to Support me
AdaptAbilities believes all behaviour is simply a form of communicating one's needs. Behaviours do not occur without a reason. The first step in supporting a person with behaviours is getting to know them.

Personal Development
Identify goals and what meaningful days look like for programming.

Medical
Physicians, Medical Info, Seizure info, Diabetes info, Health issues, Dietary needs, and Allergies

Program Requirements
Funding information, Upload your funding contract

Update Profile

At the bottom, check the acknowledgment statement. It is optional to sign up for our e-newsletter. You will need to type your name in the Signature field and click “Update Profile”. This will notify our team that the participant’s profile has been updated.

INVOICES

This tab shows all current and historical invoices for services. This section is only applicable if services are rendered using an FSCD contract, Family Managed Services, or Parent Responsibility. Digitally signing and approving invoices will send it directly to a funder for payment.

Invoices must be signed and approved or returned within 2 business days. Services will be suspended if there are outstanding invoices.

Approving and Returning Invoices

1. You will receive an email notification when there is a new invoice that requires your attention.

2. When viewing the Invoice List, you can see the status of each invoice.

Status	Invoice Date	Action
Pending	Mar 1, 2023 - Mar 31, 2023	View/Approve
Rejected	Sep 1, 2022 - Sep 30, 2022	View/Approve
Approved	Aug 1, 2022 - Aug 31, 2022	View/Approve

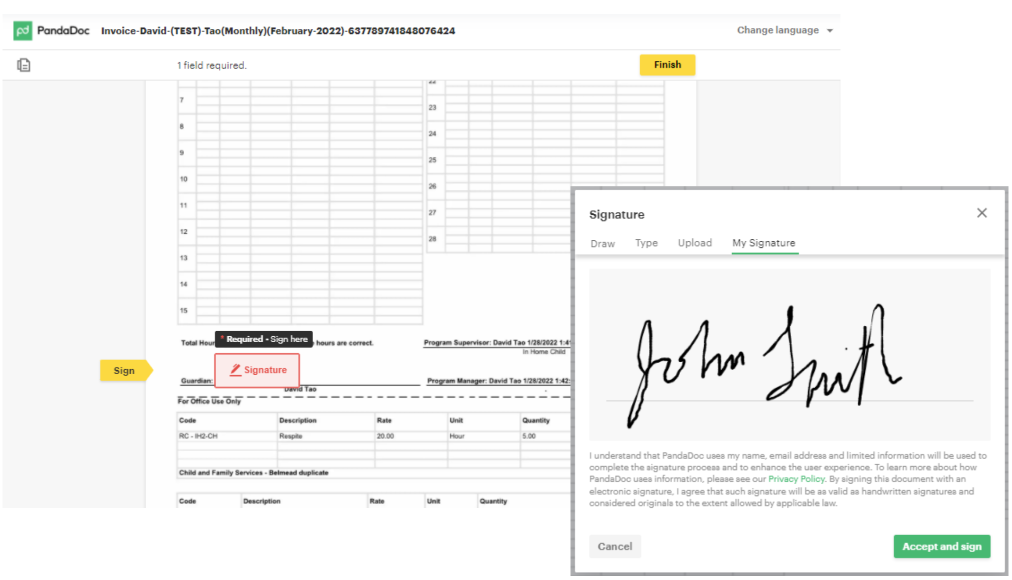
a. "Pending" means it requires your attention.

b. "Approved" means you have digitally signed and submitted the invoice for payment.

c. "Returned" means that there was an issue with the invoice, and you have to return it to AdaptAbilities to resolve.

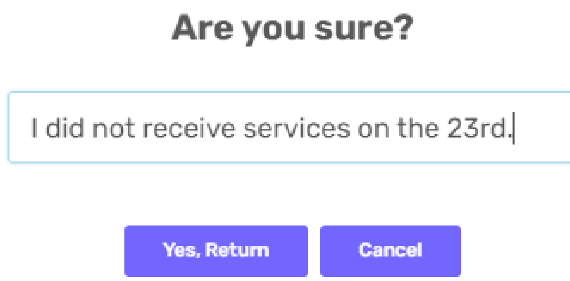
13. When there is an invoice labelled "Pending", click "View/Approve" to review it.

14. If everything looks correct, you can click the red "Signature" box. Another window will appear where you provide your signature. Click "Accept and Sign" once completed. This will send the signed invoice to your funder.



compassion • belonging • capacity building • integrity • peace of mind • teamwork

15. If you notice something wrong on the invoice, you can click the red “Return Invoice” button. A window will pop up where you can enter information regarding what is wrong with the invoice. A Program Supervisor will receive an email with the details you provided. They will fix the invoice and resend it to you to submit.

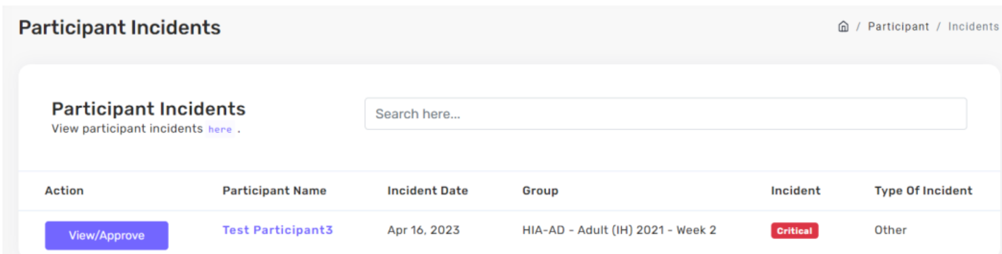


INCIDENT REPORTS

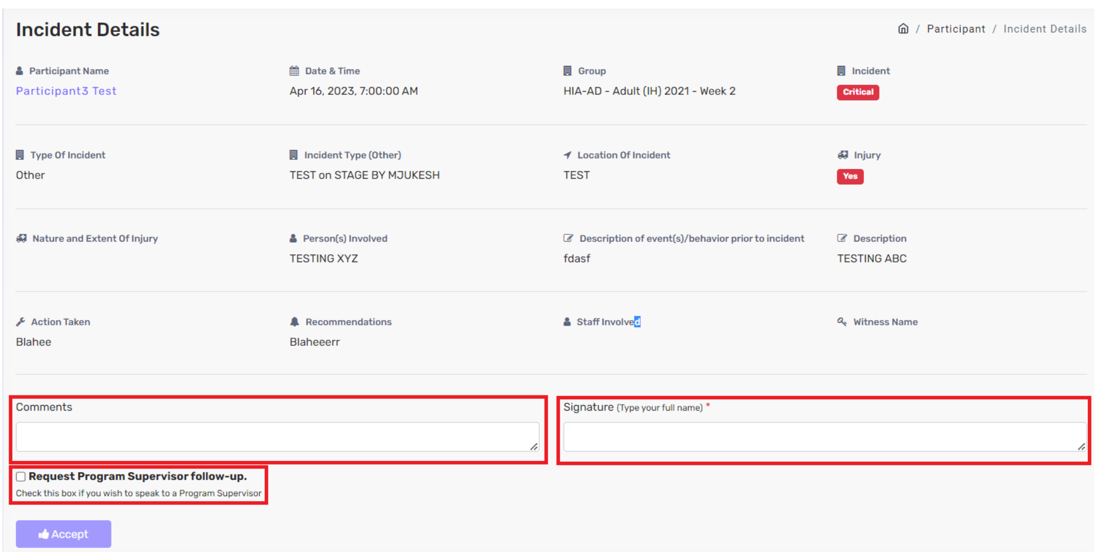
This tab is where you receive Incident Reports from our team. You can leave comments, request Program Supervisor follow-up (optional), and approve the Incident Report.

We ask that Incident Reports are approved within 7 days of receipt. A Program Supervisor will contact you if this timeline is not met.

Approving Incident Reports



1. Click "View/Approve"



2. Review the incident report and add comments in the Comments field.
3. Type your full name in the Signature field.
4. You may check the box "Request Program Supervisor follow-up" if you have any concerns about the incident. A Program Supervisor will contact you.
   Note: Not checking this box means you are satisfied with the result of the incident.
5. Click **Accept**.
   Note: This button is only available after you enter a comment and your name in the signature field.
6. Click **Yes, accept it** to confirm approval.