

FAMILY PORTAL GUIDE

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 made one yet.
2. Enter your name and email. 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!

The image displays two side-by-side screenshots of the AdaptAbilities website's user interface. Both screenshots feature the AdaptAbilities logo at the top, which consists of three stylized human figures in blue, yellow, and orange, followed by the text 'ADAPTABILITIES' and the tagline 'CREATING SUCCESS FOR LIFE'.

The left screenshot shows the 'Sign in to account' form. It has a title 'Sign in to account' and a subtitle 'Enter your email & password to login'. It contains two input fields: 'Email Address' with the placeholder 'app@yourmail.com' and a red error message 'Email is required.' below it; and 'Password' with a masked password '*****' and a red error message 'Password is required.' below it. There are also checkboxes for 'Remember password' and a link for 'Forgot password?'. A blue 'Sign in' button is at the bottom, and a link for 'Don't have account? Create Account' is at the very bottom.

The right screenshot shows the 'Create your account' form. It has a title 'Create your account' and a red error message: 'Please enter the email address you provided to Adaptabilities upon registration.' It contains three input fields: 'Your Name' with sub-fields for 'First name' and 'Last name', both with red error messages; 'Email Address' with the placeholder 'app@yourmail.com' and a red error message; and 'Password' with a masked password '*****' and a red error message. There is a checkbox for 'Agree with Privacy Policy' and a blue 'Create Account' button. At the bottom, there is a link: 'Already have an account? Sign in'.

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.

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 returned it to AdaptAbilities to resolve.

3. When there is an invoice labelled "Pending", click "View/Approve" to review it.
4. 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.

The screenshot displays the PandaDoc interface for reviewing and signing an invoice. The main window shows the invoice details, including the status 'Pending', the invoice date 'Mar 1, 2023 - Mar 31, 2023', and a 'View/Approve' button. A 'Sign' button is also visible. A signature modal is open, showing a handwritten signature and an 'Accept and sign' button. The modal also includes a 'Cancel' button and a privacy policy notice.

Invoice Details:

- Invoice: Invoice-David-(TEST)-Tao(Monthly)(February-2022)-637789741848076424
- Status: Pending
- Invoice Date: Mar 1, 2023 - Mar 31, 2023
- Action: View/Approve

Signature Modal:

- Signature: John Smith
- Buttons: Cancel, Accept and sign
- Privacy Policy: I understand that PandaDoc uses my name, email address and limited information will be used to complete the signature process and to enhance the user experience. To learn more about how PandaDoc uses information, please see our Privacy Policy. By signing this document with an electronic signature, I agree that such signature will be as valid as handwritten signatures and considered originals to the extent allowed by applicable law.

5. 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.

Are you sure?

I did not receive services on the 23rd.

Yes, Return

Cancel