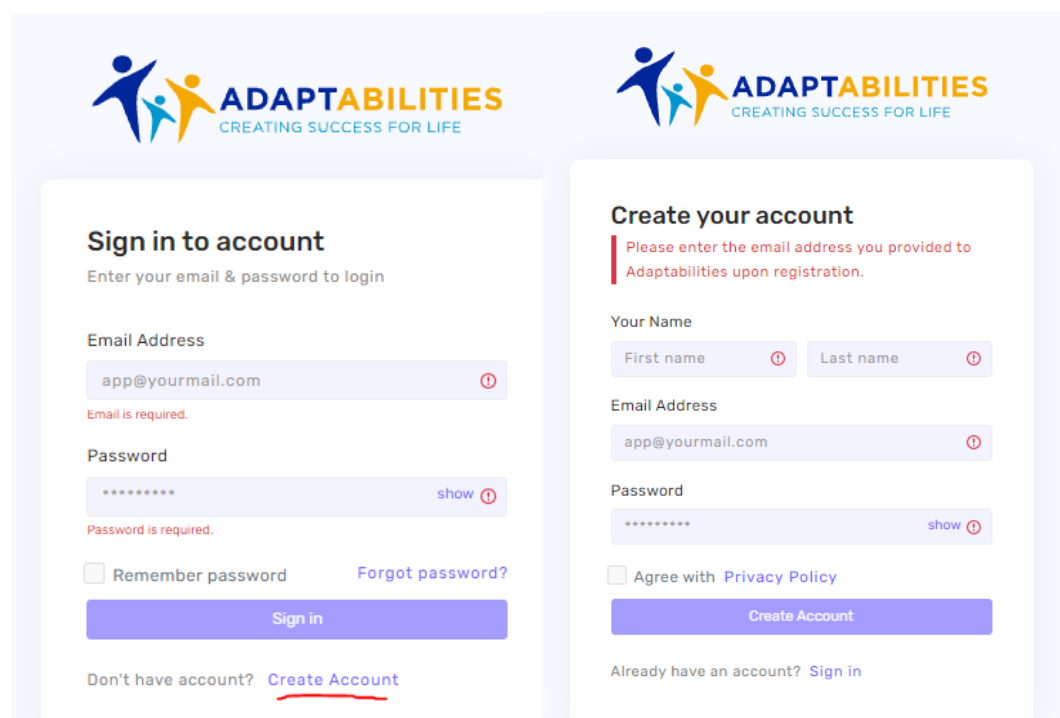

Family Portal Guide

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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 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.

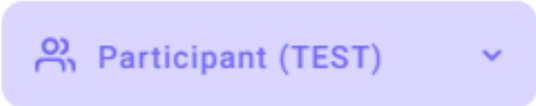


The image shows two side-by-side screenshots of the AdaptAbilities website interface. The left screenshot is the 'Sign in to account' page. It features the AdaptAbilities logo at the top left. Below the logo, the heading 'Sign in to account' is followed by the instruction 'Enter your email & password to login'. There are 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 field '*****' and a 'show' button with a red error message 'Password is required.' below it. At the bottom of the form, there is a checkbox for 'Remember password', a link for 'Forgot password?', and a blue 'Sign in' button. Below the button, there is a link for 'Don't have account? Create Account'. The right screenshot is the 'Create your account' page. It features the AdaptAbilities logo at the top left. Below the logo, the heading 'Create your account' is followed by a red error message: 'Please enter the email address you provided to Adaptabilities upon registration.' There are 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 field '*****' and a 'show' button with a red error message. At the bottom of the form, there is a checkbox for 'Agree with Privacy Policy' and a blue 'Create Account' button. Below the button, there is a link for 'Already have an account? Sign in'.

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 and Medication Release are required to be updated annually at a minimum. These forms both expire on August 31 every year. New forms are available to be digitally signed on May 1st of every year. Updates to current forms can be done at any time.



- Consent Forms
- Annual Update
- Medication Release

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

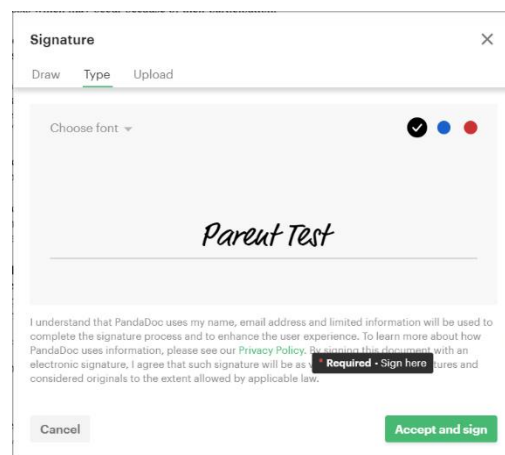
Consent Form	Participant	Expiry Date	Status	Action
Consent form			Expiring in 0 days	Update

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.

Signing Consent Forms

1. Click the blue “Update” button to begin.
2. Two documents will appear for you to digitally sign. Both documents must be signed.
3. Click **Start** at the top of the Assumption of Risk form or go directly to the red Signature box.
4. Click the red Signature box.
5. Draw or type your signature.
6. Click “Accept and Sign”.
7. Scroll to the Release of Information consent form and click **Start** or go directly to the red Signature box.
8. Draw or type your signature.
9. Click “Accept and Sign”.
10. At the top of either form, click **Finish**.

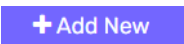

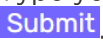



Medication Release

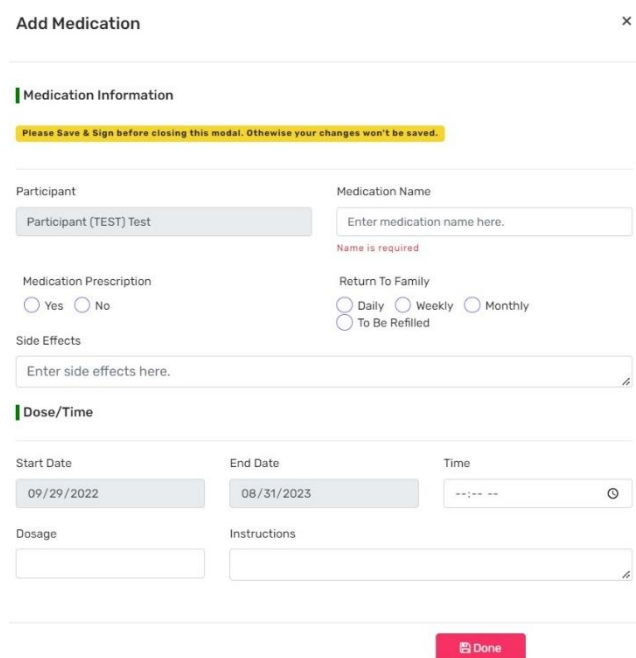
This section outlines the medication AdaptAbilities is permitted to administer to the participant.

If the participant **does not** require medication to be administered by AdaptAbilities, click the check box stating, “No medication required”, type in your name, and click “Submit”.

If the participant **does** require medication, follow these steps:

1. Click 
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 .
4. Do steps 1 to 3 for as many medications as required.
5. Type your name at the bottom and click .
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.



Add Medication [X]

Medication Information

Please Save & Sign before closing this modal. Otherwise your changes won't be saved.

Participant: Participant (TEST) Test

Medication Name: Enter medication name here. (Name is required)

Medication Prescription: Yes No

Return To Family: Daily Weekly Monthly To Be Refilled

Side Effects: Enter side effects here.

Dose/Time

Start Date: 09/29/2022

End Date: 08/31/2023

Time: --:--:--

Dosage: [Text Input]

Instructions: [Text Input]

[Done]

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.

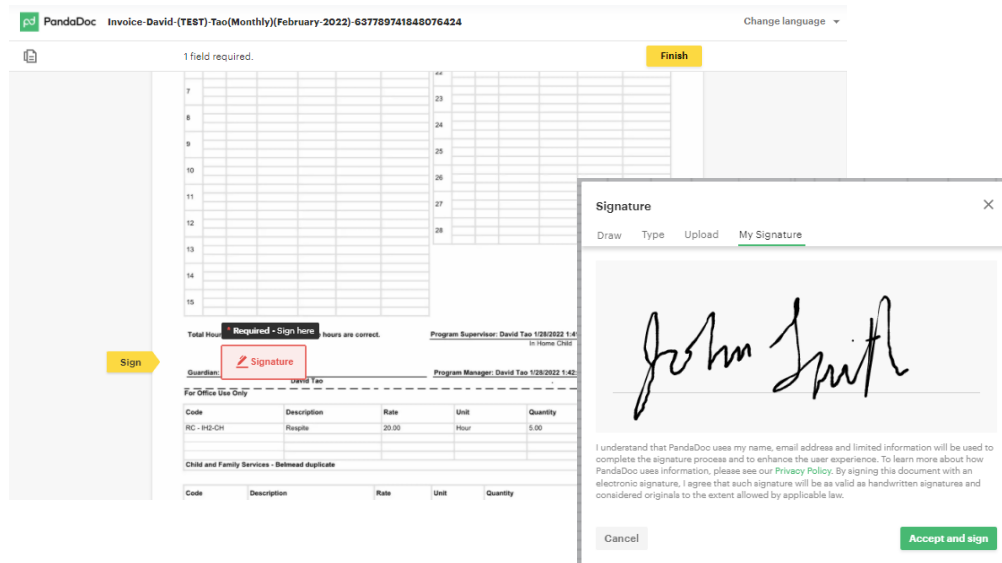
Status	Invoice Date	Action
Pending	Mar 1, 2023 - Mar 31, 2023	View/Approve
Rejected	Sep 1, 2022 - Sep 30, 2022	View/Approve
Approved	Aug 1, 2022 - Aug 31, 2022	View/Approve

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.

- When there is an invoice labelled "Pending", click "View/Approve" to review it.
- 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 shows the PandaDoc interface for signing an invoice. The main window displays an invoice with a 'Sign' button. A 'Signature' modal window is open, showing a digital signature of 'John Smith' and an 'Accept and sign' button. The modal also includes a 'Cancel' button and a privacy policy notice.

- 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](#)