

# Presence Counseling Services & Presence Developmental Services Clinic Tracker & Patient Portal Guidance Document

Presence Counseling Services and Presence Developmental Services has implemented the electronic health record system called “**Clinic Tracker**”, and the **Patient Portal** is our secure web-based system to allow Individuals and providers to access and collaborate the individual services. The Clinic Tracker Patient Portal utilizes industry standard SSL encryption for all web traffic, in addition to **encrypted passwords**, to ensure that the patient data is not at risk of being accessed from an unauthorized user.

## ✓ TO BEGIN THE REFERRAL PROCESS TO PRESENCE COUNSELING SERVICES:

Please go to Presence Counseling Services and Presence Developmental Services website <https://presencedevelopmental.com/make-a-referral> to register for a new account and access the Patient Portal.

## ✓ TO REGISTER FOR A NEW ACCOUNT IN THE PATIENT PORTAL:

The screenshot shows the registration page for the Patient Portal. At the top, there is a blue header with the text "PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRES..." and a "[ Log In ]" link. Below the header, the page is titled "REGISTER NEW ACCOUNT". A note states: "Note: Only complete this process if you have not yet been seen at our agency. If you have been registered in our system already, please contact us so we can provide you with your login credentials." The registration form includes fields for "First Name \*" (containing "Apple"), "Last Name \*" (containing "Sample"), "Email Address (This will be your User Name) \*" (containing "rachellesantana@presencedevelopmental.com"), "Password \*" (masked with dots), and "Confirm Password \*" (masked with dots). A "Register" button is located at the bottom left of the form area. At the bottom of the page, there is a "Contact Us" link with the phone number "315-515-5183" and two heart-shaped logos for "Presence DEVELOPMENTAL SERVICES" and "Presence Counseling Services".

The screenshot shows the success message page of the Patient Portal. At the top, there is a blue header with the text "PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESE..." and a "[ Log In ]" link. Below the header, the page is titled "SUCCESS" and contains the message: "User account created successfully. Please check your mailbox for a confirmation email. If you do not find it in your inbox, please check your spam folder." A "Contact Us" link with the phone number "315-515-5183" is located above two heart-shaped logos for "Presence DEVELOPMENTAL SERVICES" and "Presence Counseling Services". At the bottom, there is a footer that reads: "Clinical services to persons with developmental disabilities at home and in the community. All Times Are Displayed In Your Current Time Zone: GMT-05:00 (Current Time: 09:56 PM)".

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**You will receive email confirming new account registration within moments.**

**\*IF** you do not see email message confirming registration, please submit registration process one (1) more time, and / or you may send email to [info@presencedevelopmental.com](mailto:info@presencedevelopmental.com) alerting the Administration staff of the issue.

Hi,

The purpose of this email is to let you know that you have been added as an authorized representative for someone on our ClinicTracker Patient Portal. You will now be able to access the following portions of the medical record for which you have been granted permission:  
- All Available Features

As an existing user on the ClinicTracker Portal, you will be able to access this patient using your existing login credentials by visiting:  
<https://portal.ClinicTracker.com/Index.aspx?clinicid=PDS>

Please do not reply to this message. It is sent from an account that is not monitored.

Click on link found in email to continue  
electronic registration process

Click on the link found in confirmation email to be taken to Presence Counseling Services & Presence Developmental Services Patient Portal.

## LOGGING IN TO THE PATIENT PORTAL FOLLOWING REGISTRATION EVENT & COMPLETING PRESENCE REFERRAL FORM:

If you are experiencing trouble, please email [info@presencedevelopmental.com](mailto:info@presencedevelopmental.com) and / or click in link for a Clinic Tracker helpful document: <http://help.clinictracker.com/logging-in-to-the-patient-portal>

1. Enter your username and password. Place a checkmark next to "I'm not a robot."
2. Find and click the CLICK HERE link Under heading "Need an Account?"

### PATIENT / REPRESENTATIVE LOG IN

**Account Information**

Username \ Email:

Password:

I'm not a robot

[Forgot Password?](#)

[Log In](#)

Welcome to the ClinicTracker Patient Portal. This is a message that can be customized by your agency.

[Staff Login](#)

**PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESENCE DEVELOPMENTAL SERVICES**

**PATIENT / REPRESENTATIVE LOGIN**

Current Portal Users Sign In Here

Email Address / Username:

Password:

I'm not a robot

[Forgot Password?](#)

[Log In](#)

Welcome to Presence Counseling Services and Presence Developmental Services!  
[Staff Login](#)

**Need an Account?**

New to Presence Counseling Service and Presence Developmental Services and Interested in Registering for Services?

[Click here](#) to complete our intake packet for you or a family member.



- Our staff will get back to you promptly.

Existing Patient Without an Account?

- Contact our office for your login credentials.
- Use those credentials to access your clinical information, upcoming appointments, and more.

Thank you for your interest in our programs.

[Contact Us](#)  
315-515-5183



3. Enter information and then click REGISTER.

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### REGISTER NEW ACCOUNT

Note: Only complete this process if you have not yet been seen at our agency.  
If you have been registered in our system already, please contact us so we can provide you with your login credentials.

First Name *	Last Name *
<input type="text" value="Mickey"/>	<input type="text" value="Mouse"/>
Email Address (This will be your User Name) *	
<input type="text" value="mmouse@hmail.com"/>	
Password *	
<input type="password" value="•••••"/>	
Confirm Password *	
<input type="password" value="•••••"/>	

By registering, you are agreeing to our terms of service and privacy policy.

[Register](#)

4. You will see message of Success.

## PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESENCE DEVELOPMENTAL SERVICES

### SUCCESS

User account created successfully. Please check your mailbox for a confirmation email. If you do not find it in your inbox, please check your spam folder.

[Contact Us](#)  
[315-515-5183](tel:315-515-5183)

5. Please review the email account for confirmation message, and click on link in the email to activate account.

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## PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESENCE DEVELOPMENTAL SERVICES

Form Requests   Messages   Linked Profiles

IN THIS AREA YOU CAN ESTABLISH YOURSELF AS A PROXY ON BEHALF OF SOMEONE ELSE. YOU DO SO BY CREATING AN ACCOUNT FOR THAT PERSON ON THE PORTAL. ONCE YOU CREATE THE ACCOUNT, YOU CAN VIEW AND MANAGE THAT INFORMATION.

[Click here](#) to register yourself as a patient account.

[Click here](#) to register a new proxy.

### FORM REQUESTS

You don't have any pending form completion requests.

[Contact Us](#)  
315-515-5183

6. Select if you wish to register yourself as a patient OR register a new proxy.
7. Complete the Patient Portal Registration short form (all areas highlighted **RED** are to be completed prior to submitting)

**PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESENCE DEVELOPMENTAL SERVICES**   Welcome Mickey Mouse [ [Log In](#) ]

Form Requests   Messages   Linked Profiles

**PATIENT PORTAL REGISTRATION FORM**

[← Back](#)   [Save](#)

\* Register As:

**Demographics**

\* First Name

\* Last Name

\* Date of Birth  [\[?\]](#)

Address

City    State    Zip

Cell Phone Number

\* Time Zone

Insurance Name

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8. Once you submit the short referral form, please locate Step 2. Forms to locate the Presence Referral Form and Click to complete.

PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESENCE DEVELOPMENTAL SERVICES

Form Requests Messages Linked Profiles

[← Back](#) [Collapse All](#)

**Step 1. Profile** (Registration summary) ✓

Click [here](#) to view or edit your registration details.

Status	Pending
First Name	Maisy
Last Name	Mouse

**Step 2. Forms** (List of forms to be filled by you) ●

Forms to complete:

Name	Description	Status
Presence Referral Form		<a href="#">Click to Complete</a>

**Step 3. Submit** (To submit your registration details along with forms completed) ●

Yes, I wish to submit my registration details and send the completed forms to the clinic.

[← Submit](#)

Status:  
Pending - Yet to submit registration. Submitted - Registration submitted, waiting for approval. Approved - Clinic has approved registration. Rejected - Clinic has rejected registration.

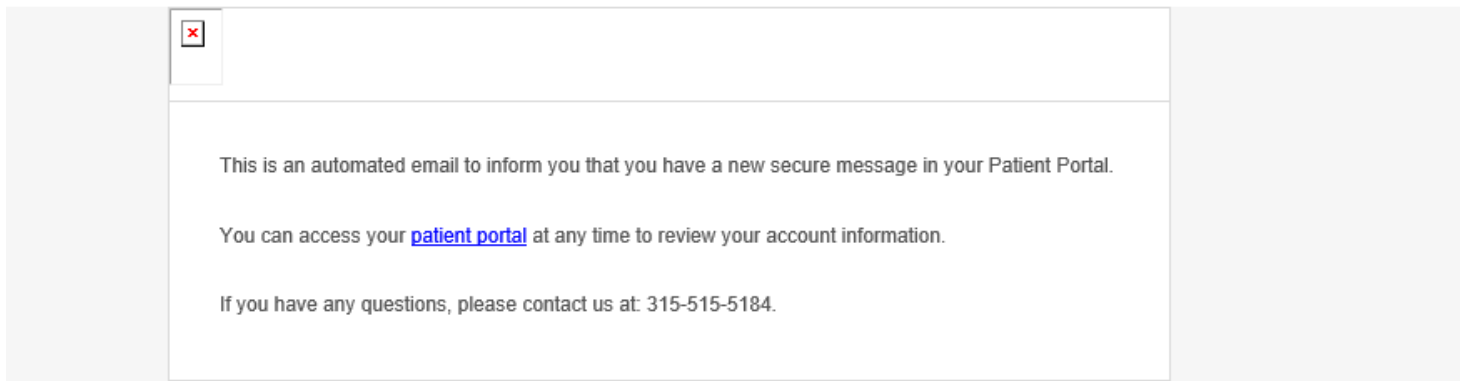
[Change Password](#) [Contact Us](#)

9. Complete referral form. Check box in step 3 and proceed with submitting referral.

## ONCE REGISTERED, COMPLETING FORMS IN THE PATIENT PORTAL:

Your Presence provider or office staff may assign you forms, consents, agreements, or rating scales to complete online through the portal.

You will receive email message alerting you to the secure message in the Patient Portal.



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You'll know if you have form and how many forms to work on in the section labeled "Form Requests (#)"

**PATIENT PORTAL FOR JAG SHARE DEMO**

Home Form Requests (3) Clinical Info My Schedule My Account Educational Resources My Medical File Messages (4) Linked Profiles

**DEMOGRAPHICS**

**Patient Name:**  
Christine Peters (25345480)

**Address:**  
100 Cowan Ave, Suite 900 #B  
APT #9IKJr  
Lakeland, NY 13088-9999

**Primary Phone:** (315) 420-2764  
**Email Address:** Unknown

**Other Phone:**  
**Preferred Contact Method:** Main Phone

**INSURANCE**

**Primary Insurance:** BCBS Excellus  
**Secondary Insurance:** N/A  
**Tertiary Insurance:** N/A

**UPCOMING APPOINTMENT**

**Start Date / Time:** Monday, January 29, 2018 1:15 PM  
**End Date / Time:** Monday, January 29, 2018 1:45 PM  
**Staff:** Black, Jane  
**Location:** None specified  
[View upcoming appointments](#)

**FORM REQUESTS**  
There are 3 forms waiting to be completed [Click here to view a list of pending forms.](#)

[Change Password](#)  
[Manage Authorized Representatives](#)



When you click on one of the forms, you'll usually see several tabs that represent different sections of the form. Fill in the blanks for each tab of the form.

The screenshot shows a patient portal interface. At the top, there is a navigation bar with tabs: Home (3), Clinical Info, My Schedule, My Account, Educational Resources, My Medical File, and Messages (3). Below the navigation bar are two buttons: Save and Submit. A red arrow points to the Patient Name field, which contains 'John Zippy'. Other fields include Report Date (11/20/2015) and Requested By (Eden, ProviderMD). Below these fields are two tabs: Treatment Plan and Signature. The main content area has a purple header for 'Catholic Social Service Progress Notes'. Underneath, there are fields for LOCATION (HOME) and UNITS. A section for OTHERS PRESENT has a table with a header row containing a plus sign and the word 'Name'. Below this is a large empty text area. Further down is a green header for 'MENTAL STATUS: (Check all that apply)'. This section includes fields for MOOD (depressed), THOUGHT (normal), COPING:disturbances in:, and SPEECH. At the bottom, there is a label 'Thoughts Intent Plan'.

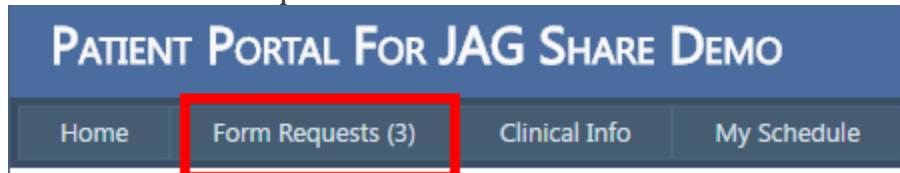
You can Save or Submit the form by clicking on the appropriate icon. We recommend that you save the form frequently so, even if you log out and back in again, the information will still be available.

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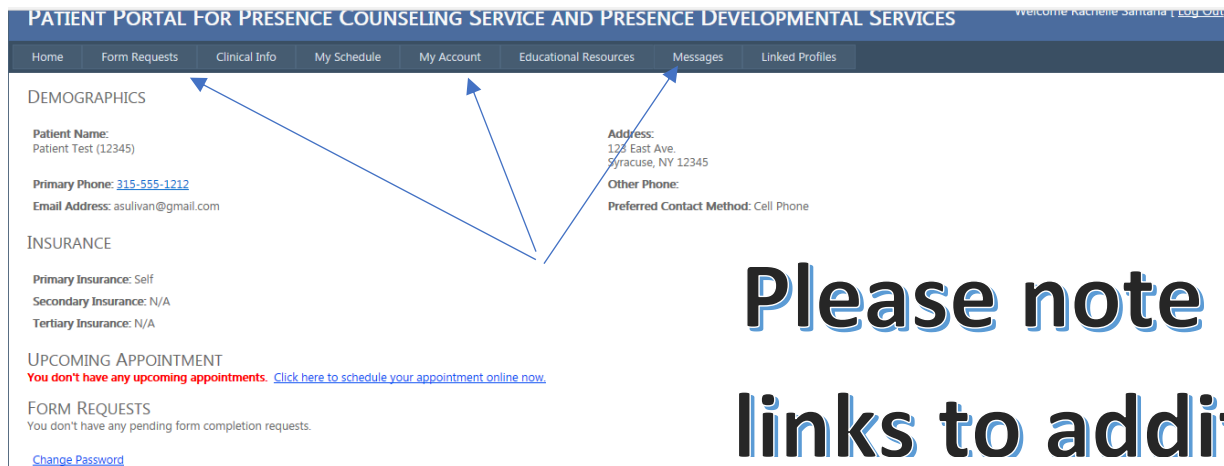
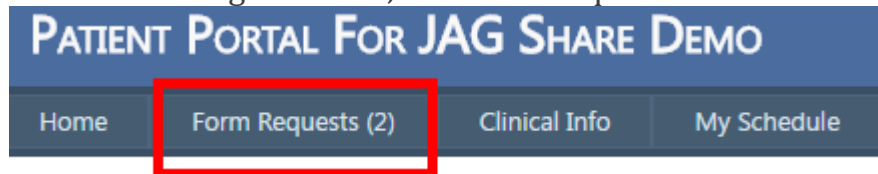


You will note that the count next to the Home tab will decrease when you submit a form.

Here the Form Requests are 3



After submitting one form, the Form Request now shows 2



**Please note this screen has  
links to additional sections.**

# Presence Counseling Services & Presence Developmental Services Clinic Tracker & Patient Portal Guidance Document

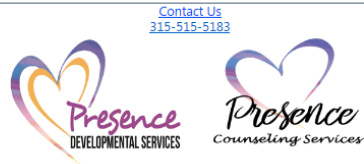
PATIENT PORTAL FOR PRESENCE COUNSELING SERVICE AND PRESENCE DEVELOPMENTAL SERVICES Welcome Rachelle Santana [ [Log Out](#) ]

Home Form Requests Clinical Info My Schedule My Account Educational Resources Messages Linked Profiles

INBOX  
[Inbox \(2,0 New\)](#) | [Sent \(2\)](#) | [Trash \(0\)](#)  
[Click here](#) to compose a new message.

Subject	Sender Name	Sent Date
<a href="#">Please complete Presence Referral Form</a>	Rachelle Santana	12/17/2018 10:06 AM
<a href="#">Please complete Presence Referral Form</a>	Rachelle Santana	11/16/2018 08:20 AM

The Messages tab is holding place to complete and /or send secure personal health information. See below for further information regarding messaging thru Patient Portal.



Contact Us  
315-515-5183

Clinical services to persons with developmental disabilities at home and in the community  
All Times Are Displayed In Your Current Time Zone: GMT-05:00 (Current Time: 10:13 AM)

List of supporting documentation:  
If you have any difficulties completing form or uploading required documentation, please call (315) 515-5183, or email info@presencedevelopmental.com

- Copy of OPWDD eligibility determination
- Copy of Individualized Service Plan or Life Plan
- Copy of Individualized Education Plan(if applicable)
- Copy of Social Security Card
- Copy of current Insurance cards( front and back)
- Copy of any information relevant to referral(e.g. reports, meeting minutes, or information from other providers)

Required Supporting Documentation:

Date	Category	Description

Submit

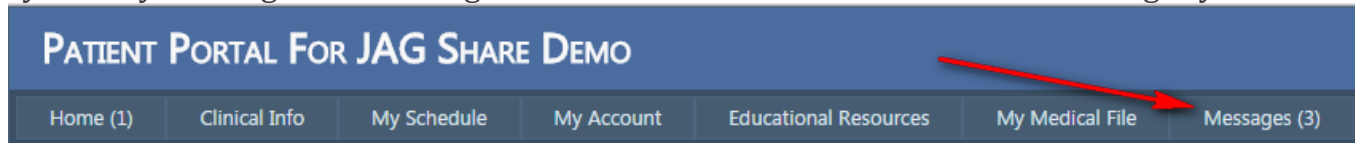
Are you sure you want to leave?  
You might lose any changes you've made on this page.

Leave Stay

IF you receive this question once finished completing forms, you can select Leave.

## SENDING/RECEIVING MESSAGES THROUGH THE PATIENT PORTAL

The Patient Portal provides a secure and convenient way to communicate with our provider. You can access the messaging system by clicking on the far-right tab. You will also see the number of messages you have in parentheses.



Name of Field	Field Description
1. Inbox	Click on this field to see your inbox. This field will display the number of all messages and the number of new messages.
2. Sent	Click on this field to see your sent messages. This field will display the number of messages sent.
3. Trash	Click on this field to see your messages that have been deleted. This field will show the number of messages that have been deleted.
4. Compose New Message	Click on this field to compose a new message.

After you click on the tab, you'll see a mailbox that lists your incoming messages. You will also see links to see messages you've Sent or moved to the Trash. There's also a place to compose a new message:

INBOX  
[Inbox \(8.3 New\)](#) | [Sent \(11\)](#) | [Trash \(1\)](#)  
[Click here](#) to compose a new message.

Subject	Sender Name	Sent Date
<a href="#">Please complete Initial Evaluation</a>	Admin	11/13/15 04:45 PM
<a href="#">Please complete Initial Evaluation</a>	Admin	11/13/15 04:13 PM
<a href="#">Please complete Initial Evaluation</a>	Barbara Anthonson	11/10/15 10:30 AM
<a href="#">Please complete Patient Portal Intake/Registration Form</a>	Admin	09/30/15 12:29 PM
<a href="#">Please complete Initial Evaluation</a>	Admin	09/30/15 12:26 PM
<a href="#">save as collateral</a>	Janie Allen	03/20/15 09:50 AM
<a href="#">Test 3</a>	Mark Shriro	05/13/14 05:46 PM
<a href="#">Test 2</a>	Admin	05/13/14 05:45 PM

You can open any message by clicking on the Subject field of that message. You will see options to Reply, Forward, Mark as Unread, Delete or Print.

# Presence Counseling Services & Presence Developmental Services Clinic Tracker & Patient Portal Guidance Document

INBOX

[Inbox \(8.3 New\)](#) | [Sent \(1.1\)](#) | [Trash \(1\)](#)  
[Click here](#) to compose a new message.

Subject	Sender Name	Sent Date
<a href="#">Please complete Initial Evaluation</a>	Admin	11/13/15 04:45 PM
<a href="#">Please complete Initial Evaluation</a>	Admin	11/13/15 04:13 PM
<a href="#">Please complete Initial Evaluation</a>	Barbara Anthonson	11/10/15 10:30 AM
<a href="#">Please complete Patient Portal Intake/Registration Form</a>	Admin	09/30/15 12:29 PM
<a href="#">Please complete Initial Evaluation</a>	Admin	09/30/15 12:26 PM
<a href="#">save as collateral</a>	Janie Allen	03/20/15 09:50 AM
<a href="#">Test 3</a>	Mark Shriro	05/13/14 05:46 PM
<a href="#">Test 2</a>	Admin	05/13/14 05:45 PM

[Reply](#) | [Forward](#) | [Mark as Unread](#) | [Delete](#) | [Print](#)

Please complete Initial Evaluation

From: Admin  
To: Zippy John  
Date: 11/13/15 04:45 PM

Hi Zippy, John,

Hi John,  
Please fill our this form and send it back to us prior to your next appointment on 12/1.

Thank you.

Please [Click Here](#) to complete the form.

When you click on the link to compose a new message, you will see this form.

## COMPOSE MESSAGE

\* Recipient Name:

- Select Recipient - ▼

\* Subject:

\* Message:

Send

Return to Messages