



## Home

Client Portal Website: Use Chrome or Firefox

[https://app.procentive.com/clientportal2/index.jsp?module=portal\\_messaging\\_module](https://app.procentive.com/clientportal2/index.jsp?module=portal_messaging_module)

Click on the client name in the upper right hand corner to get the following options:

**Change Password:** Allows clients/ reps to change their password to log into Procentive

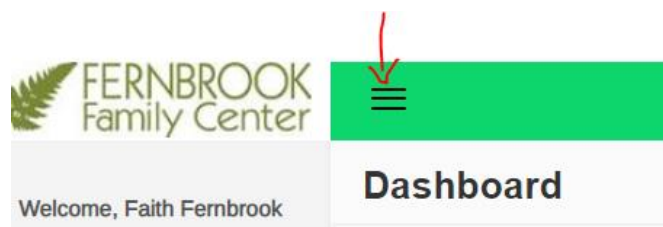
**Communication Preferences:** Allows clients to choose their preference. However, it does not limit communication to only what they select. Staff will not be able to see their choice in Procentive at this time. Please let client know we default to the Welcome Letter.

**Representative Accounts:** Client can see all of their representatives. If the client unchecks the “Active status” checkbox, the representative will no longer have access to the client portal.

**Help:** Brings the user to a FAQ page

**Logout:** Will log the user out of the Client Portal and bring them back to the login page

**Hamburger Symbol:** Will hide or display the bar along the left side of the portal



## Appointments

You can view future or past appointments and which staff member your appointment is with

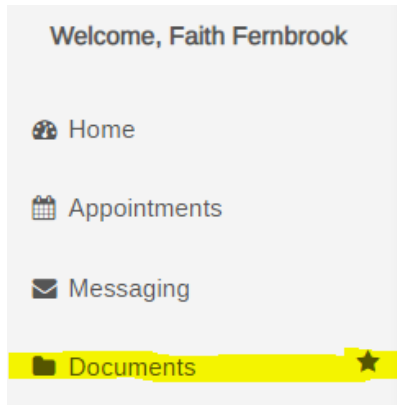
Appointments					
Future Appointments					
#	Date & Time	Staff	Location	Status	
1	Thursday, April 2, 2020, 9:00 AM	Second Trainer	Admin	Normal	
2	Monday, April 6, 2020, 9:00 AM	Cindy Gilmore	Admin	Normal	

## Documents

When your Fernbrook staff member send

Forms to Complete: This will list the forms that your Fernbrook staff member has sent to you for signature

If you have documents to be signed, there will be a \* on Documents on the quick launch bar. Click on Documents



You should click on Forms to Complete

A screenshot of the "Forms to Complete" section. On the left is a "Document Category" sidebar with three options: "Forms to complete" (highlighted with a yellow bar and a pencil icon), "My Documents" (with a checkmark icon), and "Transition of Care" (with a folder icon). The main area is titled "Forms" and has a red notice: "Viewing forms requires Adobe PDF Re". Below this is a table with the following data:

Description	Date	Staff	Details
F205-1030 Release of Information (ROI)	4/6/2020		<a href="#">Open form</a>

You should then click on Open Form of the form you would like to sign

A screenshot of the "Forms to Complete" section, similar to the previous one. The "Document Category" sidebar is on the left. The "Forms" table has a red notice: "Viewing forms requires Adobe PDF Reader". The first row of the table is highlighted with a yellow bar:

Description	Date	Staff	Details
F205-1020 Client Welcome	3/30/2020		<a href="#">Open form</a>

You will click on Open Form and the message below will appear. You should click on “Click here to begin”

Please ask your provider if you have any questions. Please complete the following forms as thoroughly as possible. Then sign and click "Next."  
[Click here to begin.](#)

The Document will and you should read through the form. If you would like to print the form, you can do it from this area. Once you are ready to sign, you should click on “Next” to sign the document”

**Authorization for Release of Information**  Select if Client has Rescinded any part of this ROI  
*Complete Client Rescind Section at BOTTOM of form*

This Release of Information is regarding  . I authorize

to:

- obtain information from
- release information to
- exchange information with

**#1** Information With (contact type):  Name, Address & Phone:

The following information:

<input checked="" type="checkbox"/> Assessments/Summaries	<input checked="" type="checkbox"/> Billing Information	<input checked="" type="checkbox"/> Case Plan/Notes
<input checked="" type="checkbox"/> Chemical Health Information	<input checked="" type="checkbox"/> Consults	<input checked="" type="checkbox"/> Diagnosis
<input checked="" type="checkbox"/> Discharge Summary	<input checked="" type="checkbox"/> Health/Medical Information	<input checked="" type="checkbox"/> Legal
<input checked="" type="checkbox"/> Medical History and Physical	<input checked="" type="checkbox"/> Medications/Dosage	<input checked="" type="checkbox"/> Neuropsychological/Psychological Testing
<input checked="" type="checkbox"/> Outpatient Visit	<input checked="" type="checkbox"/> Progress/Group Notes	<input checked="" type="checkbox"/> School Information
<input checked="" type="checkbox"/> Social Information	<input checked="" type="checkbox"/> Treatment Plans and Reviews	

Other:

**#2**  For outcome reporting

After you have read the form, and you are ready to sign the form, the client, and caregiver (if client is a minor), or just the caregiver, (if client is too young to sign) sign the document, click on the “Next” button

**Understand that:**

- All health information as protected by federal regulation (Alcohol and Drug Abuse Patient Records, 42 CFR Part 2, and/or HIPAA 45 CFR) have a right to inspect and receive a copy of my treatment records that may be disclosed to others, as provided under applicable state law.
- I can revoke this authorization at any time except to the extent that action has been taken in reliance on it. Fernbrook Family Center
- For disclosures other than for treatment, payment and healthcare operations purposes, treatment may not be conditioned on my age.
- Communications resulting from this authorization will reveal that I receive services at Fernbrook Family Center.
- Federal confidentiality regulations (42 CFR Part 2) prohibit re-disclosure of information from alcohol and drug abuse patient records longer protected by HIPAA rules.
- This authorization may be used by Fernbrook Family Center owned or managed programs upon transfer of my care to them.

\*\* Information to be disclosed to you from records protected by federal confidentiality rules (42 CFR part 2). The Federal rules prohibit 42 CFR part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules

**Signatures**

Client Signature:

[Click here to print this page](#)

Caregiver Signature:

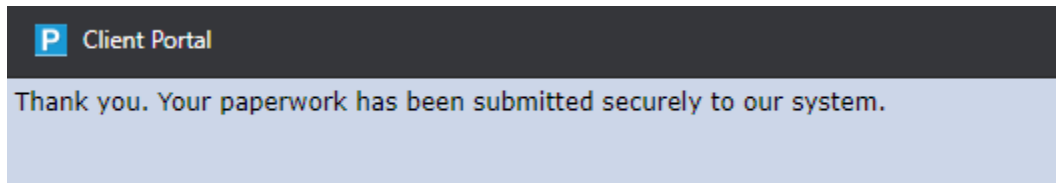
[Click here to print this page](#)

After both the client, and caregiver (if client is a minor), or just the caregiver, (if client is too young to sign) sign the document, click on the “Next” button



The screenshot shows a digital signature interface with three sections: Client Signature, Guardian Signature, and Staff Signature. Each section contains a handwritten signature in a white box. Below each signature box is a small blue link that says "start signature again". At the bottom of the form, there are three buttons: "Next" (highlighted in yellow), "Cancel", and "Print..." (with a dropdown arrow).

Signatures are accepted and you will get the following message



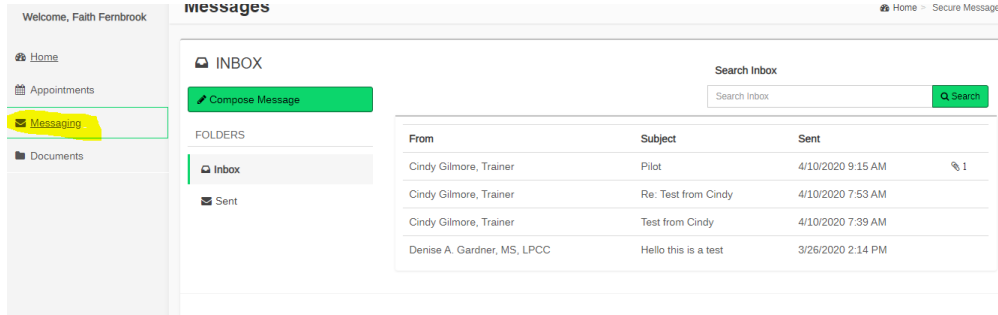
If you have questions for your Fernbrook staff member about the document, do not sign. You can exit the form and talk to your Fernbrook staff member to answer any questions. Once you are ready to sign the form, you can go back into the document and sign.

If you get any type of error message, please contact your Fernbrook staff member for them to resend the form to you.

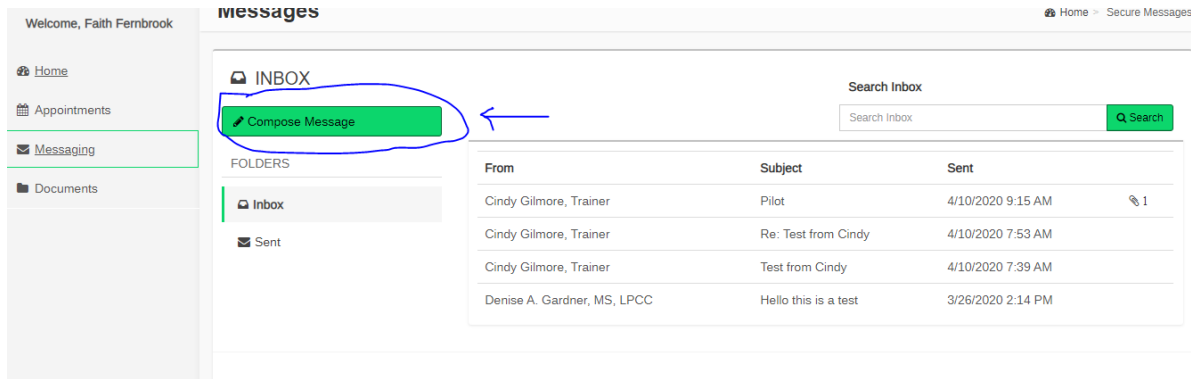
## Messaging (Secure and HIPAA Compliant)

You can send and receive messages with your Fernbrook staff.

When you log into the Client Portal, click on the Messaging link on the left



If you would like to send a new message to your Fernbrook Staff, click on compose message



Select the Fernbrook Staff member under Provider that you would like to send the message to:

The 'Compose New Message' form includes the following fields and options:

- Send to:** A dropdown menu showing 'My Provider' and a 'To:' field with 'Gilmore, Cindy' selected.
- Direct Message:** A radio button option with a 'To:' field.
- Amendment Request:** A checkbox.
- Subject:** A text input field with the placeholder 'Subject'.
- Message:** A large text area for the message content.
- Buttons:** '+ Select files...', 'Send Message', and 'Cancel'.

Below the subject field, there is a disclaimer: "The response time on messages will vary from provider to provider. Please note Client Portal should not be used for urgent situations. Please dial 911 if it is an emergency."

Put a Subject in the Subject line and you will be asked to read and agree to a message disclaimer.

**Compose New Message**

Send to:  
 My Provider To: Gilmore, Cindy  
 Direct Message To:

Amendment Request:

Subject: Subject

The response time on messages will vary from provider to provider. Please note Client Portal should not be used for urgent situations. Please dial 911 if it is an emergency.

I agree:

Message

Message

+ Select files...

Send Message Cancel

After you acknowledge you have read the disclaimer by clicking “I agree, “ the Message field will become active and they can compose their message. Once you have completed the message, click on Send Message.

**Compose New Message**

Send to:  
 My Provider To: Gilmore, Cindy  
 Direct Message To:

Amendment Request:

Subject: Subject

The response time on messages will vary from provider to provider. Please note Client Portal should not be used for urgent situations. Please dial 911 if it is an emergency.

I agree:

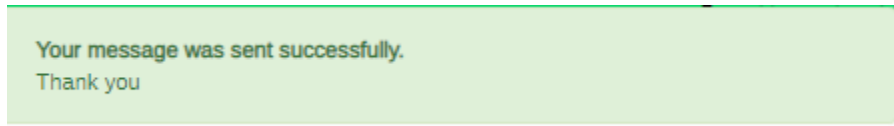
Message

Message

+ Select files...

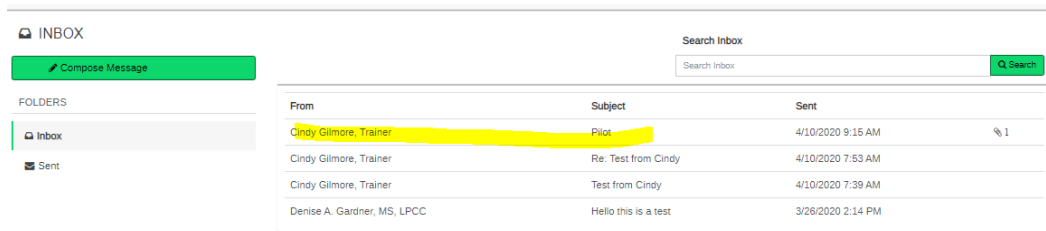
Send Message Cancel

You will see a pop up on your screen, letting you know the message was sent successfully.

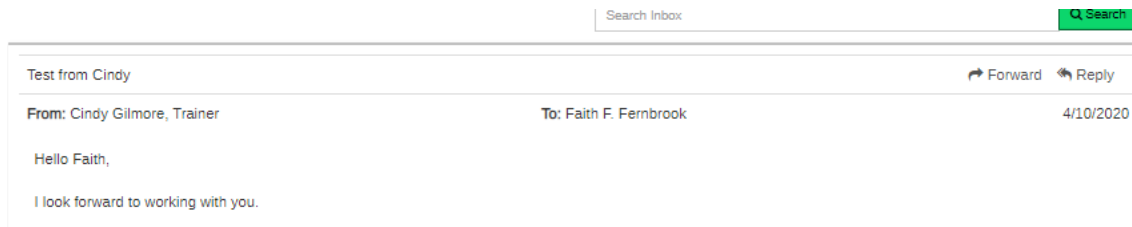


### Receiving a message

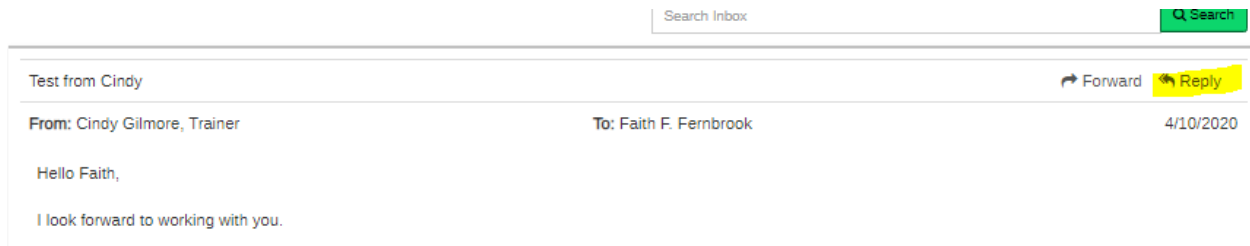
When you receive a message from your Fernbrook staff, you will see it in your portal.



### Double Click on the message to open it



### To reply to the message, click on Reply



A reply message will appear and you will need to read and agree to the disclaimer and then the message window will open for you to reply

**Reply Message** ✕

**To:** Denise A. Gardner, MS, LPC

**Subject:** Re: Hello this is a test

this is me replying to your test ----- [THIS MESSAGE IS FROM CLIENT REPRESENTATIVE Fran Fernbrook REPRESENTING CLIENT Faith F. Fernbrook] HI Denise! Fran Fernbrook

The response time on messages will vary from provider to provider. Please note Client Portal should not be used for urgent situations. Please dial 911 if it is an emergency.

I agree:

**Message**

Reply Message

Type your message and then click Send Message

**Reply Message** ✕

**To:** Cindy Gilmore, Trainer

**Subject:** Re: Test from Cindy

Hello Faith, I look forward to working with you.

The response time on messages will vary from provider to provider. Please note Client Portal should not be used for urgent situations. Please dial 911 if it is an emergency.

I agree:

**Message**

I look forward to working with you also

**+ Select Mes...**

**Send Message** ← **Cancel**

You will see a pop up on your screen, letting you know the message was sent successfully.

Your message was sent successfully.  
Thank you