

Assigning the same email address for multiple clients to access the Client Portal.

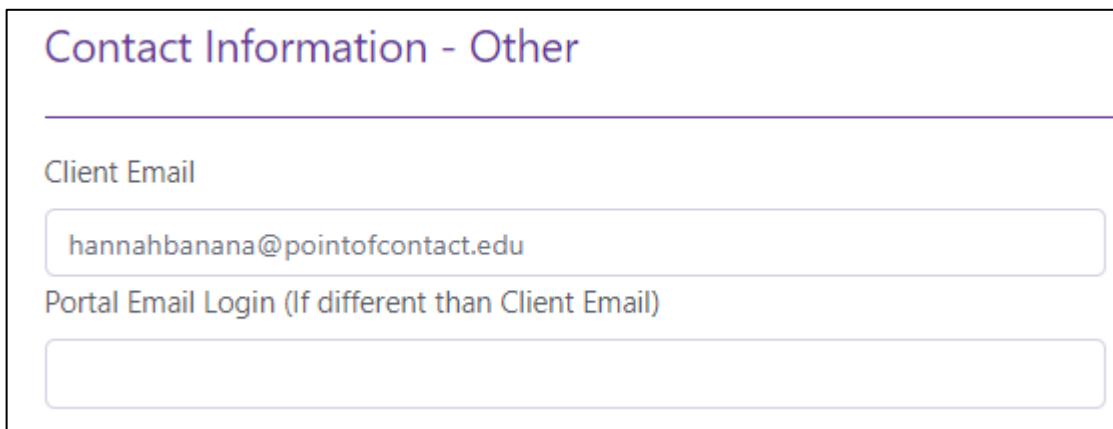
Oaktree (v3.0)

When there are multiple clients, that are minors, and have the same Point of Contact, it is expected that the Point of Contact will need to receive the consent documents for multiple clients.

These steps will also work for the scenario when the same parent or guardian that need to access the Client Portal for multiple clients.

STEPS:

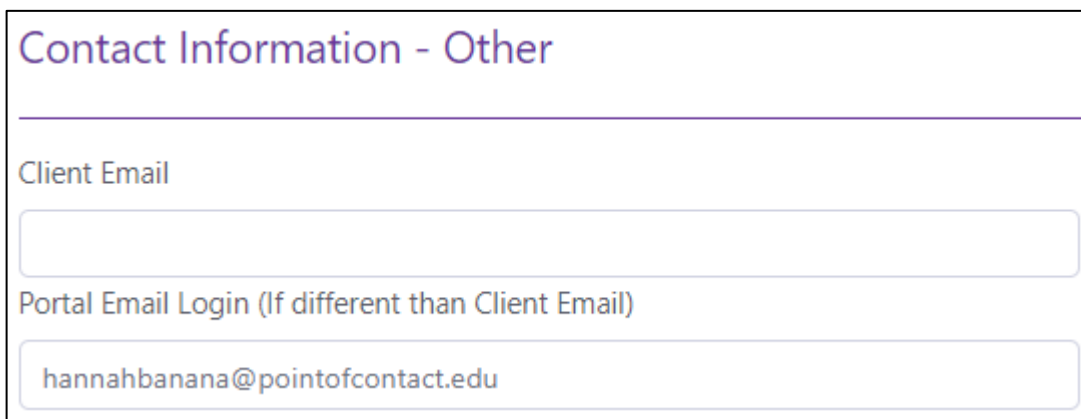
One of the clients (likely the initial client) will need to have the Point of Contact's email address entered in the "Client Email" field in Demographics.



The screenshot shows a form titled "Contact Information - Other". Below the title is a horizontal line. There are two input fields. The first is labeled "Client Email" and contains the text "hannahbanana@pointofcontact.edu". The second is labeled "Portal Email Login (If different than Client Email)" and is currently empty.

Then for each additional client that will have the same Point of Contact and will use the same email address to access to the Client Portal for the consent forms. For each of those additional clients in the Demographics field:

1. The "Client Email" field should be blank *or it can contain a unique email that is not already used.*
2. The "Portal Email Login (If different than Client Email)" should have the Point of Contact's email address entered.



The screenshot shows the same form titled "Contact Information - Other". In this instance, the "Client Email" field is empty, and the "Portal Email Login (If different than Client Email)" field contains the text "hannahbanana@pointofcontact.edu".

The "Portal Email Login (If different than Client Email)" can use the same email address multiple times for different clients.

However, for **ONLY** one of the client's, the email does need to be entered the "Client Email" field initially.

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Example Scenario:

Hannah Banana is the Point of Contact for two clients.

Client: Summer Spring

Client: Autumn Winter

- 1) Add client, April Spring, to the system.
- 2) In the Demographics for Summer Spring,
In the “**Client Email**” field Enter the POC’s email address (*hannahbanana@pointofcontact.edu*).

Contact Information - Other

Client Email

Portal Email Login (If different than Client Email)

- 3) When consent forms are sent for Summer Spring, the Point of Contact will login into the Client Portal with (*hannahbanana@pointofcontact.edu*) and see the forms for Summer Spring.
- 4) Add next client: Autumn Winter, to the system.
- 5) In the Demographics for Autumn Winter
The “**Client Email**” field will be blank or contain an unique email that is not already entered.
In the “**Portal Email Login (If different than Client Email)**” field enter the POC’s email address (*hannahbanana@pointofcontact.edu*).

Contact Information - Other

Client Email

Portal Email Login (If different than Client Email)

- 6) When consent forms are sent for Autumn Winter, the Point of Contact will login into the Client Portal with (*hannahbanana@pointofcontact.edu*) and see the forms for Summer Spring and Autumn Winter.