

How to Assign the Same Email Address to Multiple Clients When Accessing the Client Portal

When multiple minor clients have the same Point of Contact, the point of contact is expected to receive the consent documents for multiple clients. These steps also work for the scenario when the same parent or guardian needs to access the Client Portal for multiple clients.

To best explain the setup of multiple clients who might be siblings with a parent who needs to see their sent forms in the Client Portal module.

Scenario – Parent with two children

Scenario – Clinician is providing service for two siblings Tommy and Sue

Example Scenario:

- Hannah Banana the parent is the point of contact for both siblings
 - Client: Tommy Banana - (child #1)
 - Client: Sue Banana – (child #2)
- Hannah Bananas being the parent needs to receive constant forms in the Client Portal for both children

Step 1 – Setup of First Child Demographic Record

The clinician adds the first client Tommy Banana (child #1) to the OakTree record. Only for the first client (child) does the parent's email need to be added in the Add/Edit Client dialog box.

The screenshot shows the 'Add/Edit Client' dialog box with the following fields:

First Name * Tommy	Middle Name
Last Name * Banana	Date of Birth 03/03/2015
Phone 4024444444	Email hannahbanana@pointofcontact.edu
Gender Male	Zip Code 68111

* - Required Fields

Step 2 – Demographics: Contact Information – Other 1st Client

Upon starting the Demographics questionnaire, under the Contact Information Section, you will see the parent's email address for the first client Tommy Banana (Child #1) displayed in the Client Email dialog box

Client **First Child's Demographics**

First Name * Middle Name Last Name *
Tommy Banana

Nickname Maiden Name Last Name at Birth

Title Social Security # Date of Birth
03/03/2015

Gender Gender other Preferred Prounouns

Male

Work Status Client ID

Contact Information - Other

Client Email Preferred Method of Communication Agree to receive email communications for appointments only.
hannahbanana@pointofcontact.edu Yes No

Portal Email Login (If different than Client Email) Notifications Email (if different than Client Email) Client Time Zone

School Information

School's State School Affiliation Other Cancel Save Progress Save and Close

Step 3 – Setup of Second Child Demographic Record

The clinician adds the second client Sue Banana (child #2) to the OakTree record. The Client Email should be blank or it can contain a unique email that is not already used.

Add/Edit Client

First Name * Middle Name **Can be left blank or contain a unique email address not already used**

Sue **Can be left blank or contain a unique email address not already used**

Last Name * Date of Birth
Banana 05/23/2016

Phone Email

4024444444 **Can be left blank or contain a unique email address not already used**

Gender Zip Code
Female 68111

* - Required Fields

Step 4 – Demographics: Contact Information -Other 2nd Client

Then each additional client will have the same Point of Contact in this example a Parent or Guardian added to the Portal Email Login dialog box.

The screenshot shows a web form titled "Second Child's Demographics" under a "Client" header. The form is divided into several sections. The top section contains personal information fields: First Name (Sue), Middle Name, Last Name (Banana), Nickname, Maiden Name, Last Name at Birth, Title, Social Security #, Date of Birth (05/23/2016), Gender (Female), Gender other, Preferred Pronouns, Work Status, Tribal Affiliation/Enrollment, and Client ID. Below this is the "Contact Information - Other" section, which is circled in red. It includes fields for Client Email (hannahbanana@pointofcontact.edu), Preferred Method of Communication, Notifications Email, and Client Time Zone. A red box highlights the "Parents or Guardian email address" field, with a red arrow pointing to the Client Email field. At the bottom of the form are three buttons: "Cancel", "Save Progress", and "Save and Close".

These steps when completed by the clinician allow the Parent or Guardian of multiple clients (for example siblings), the ability to log into the Client Portal to review all sent forms.

For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!