Guide to Using Client Portal For Adult Clients

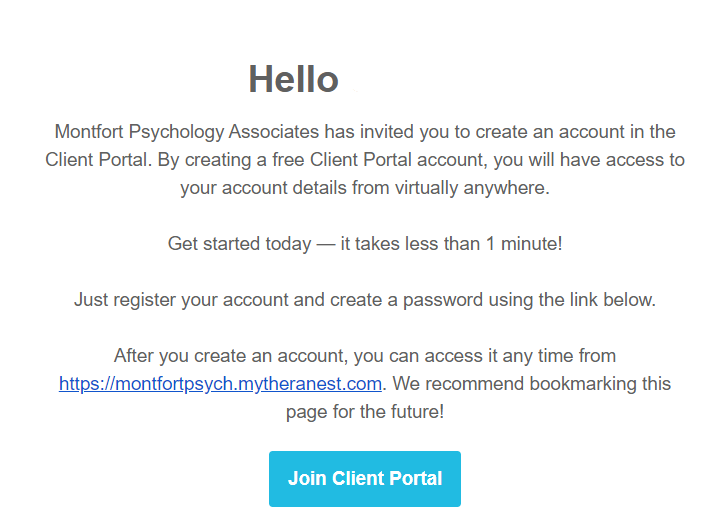
Welcome to Montfort Psychology Associates! As part of our work together, we will be using an online tool called the Client Portal.

To begin using this tool, please follow the steps in this guide or follow the directions on your screen.

1. There are two ways to set up your Client Portal account. The first and most common, is by invitation. This process is initiated by our clinic and will include an email being sent to you from “Natalie Montfort”, though the email address will be [do-not-reply@theranest.com.](mailto:do-not-reply@theranest.com.)

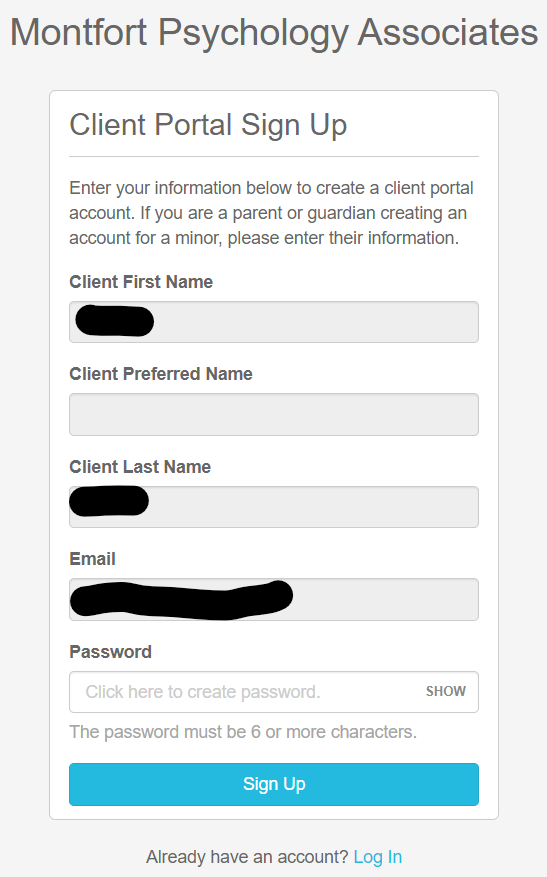


1. The body of that email will look like this:



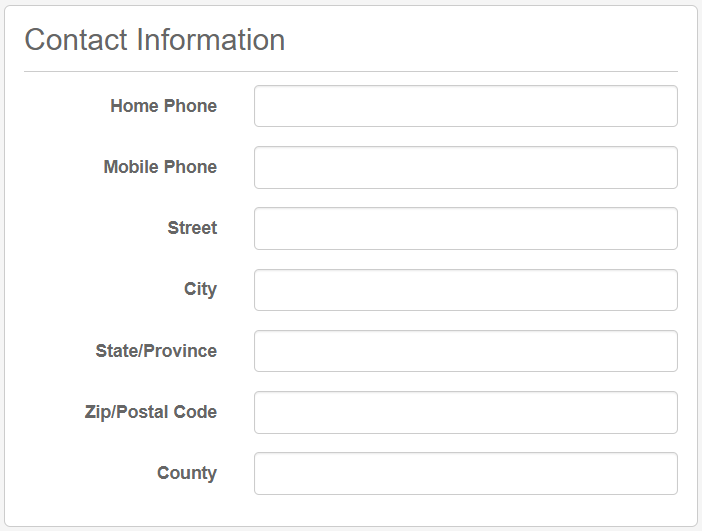
When you are ready to set up your portal account, click the large blue button at the bottom of the email. You may also wish to save the link <https://montfortpsych.mytheranest.com> to your bookmarks or favorites to help you return as needed.

1. Clicking the “Join Client Portal” button will take you to a simple webpage that looks like this:

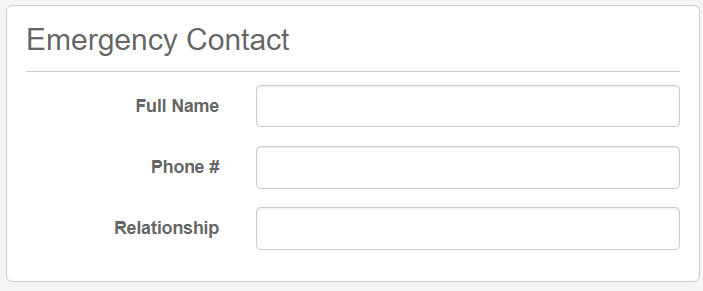


All fields will be pre-filled, except for the Password field. Select a password, and click “Sign Up”. Please note that “client” will be the person receiving services. This may be your child or yourself, depending on the services being requested.

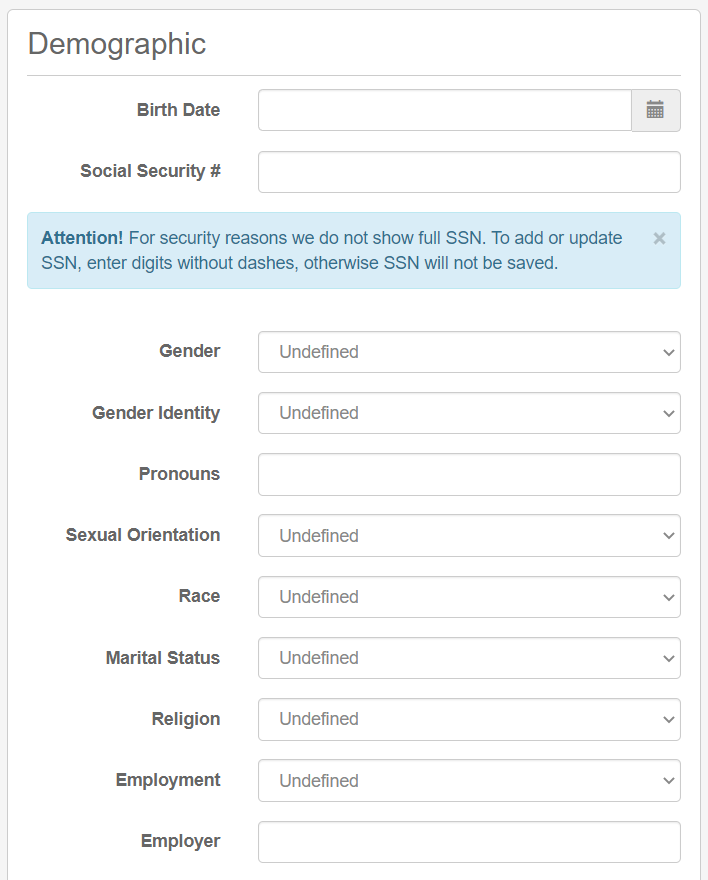
1. Next, you will be taken to a page where you can enter other information, including Contact Information:



Emergency Contact information:



And Demographic Information:

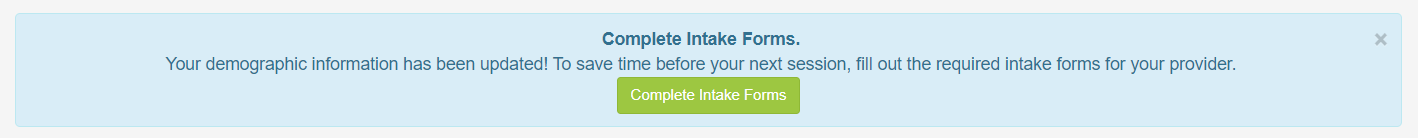


Please complete these sections as thoroughly as possible. Note: **Please DO NOT enter a social security number**. This information is not necessary for our work together.

When this information has been entered, scroll to the top of the page and click the “Save Demographic Info” button at the top right.



1. After saving your demographic information, a dialogue box will pop up at the top of the screen that looks like this:



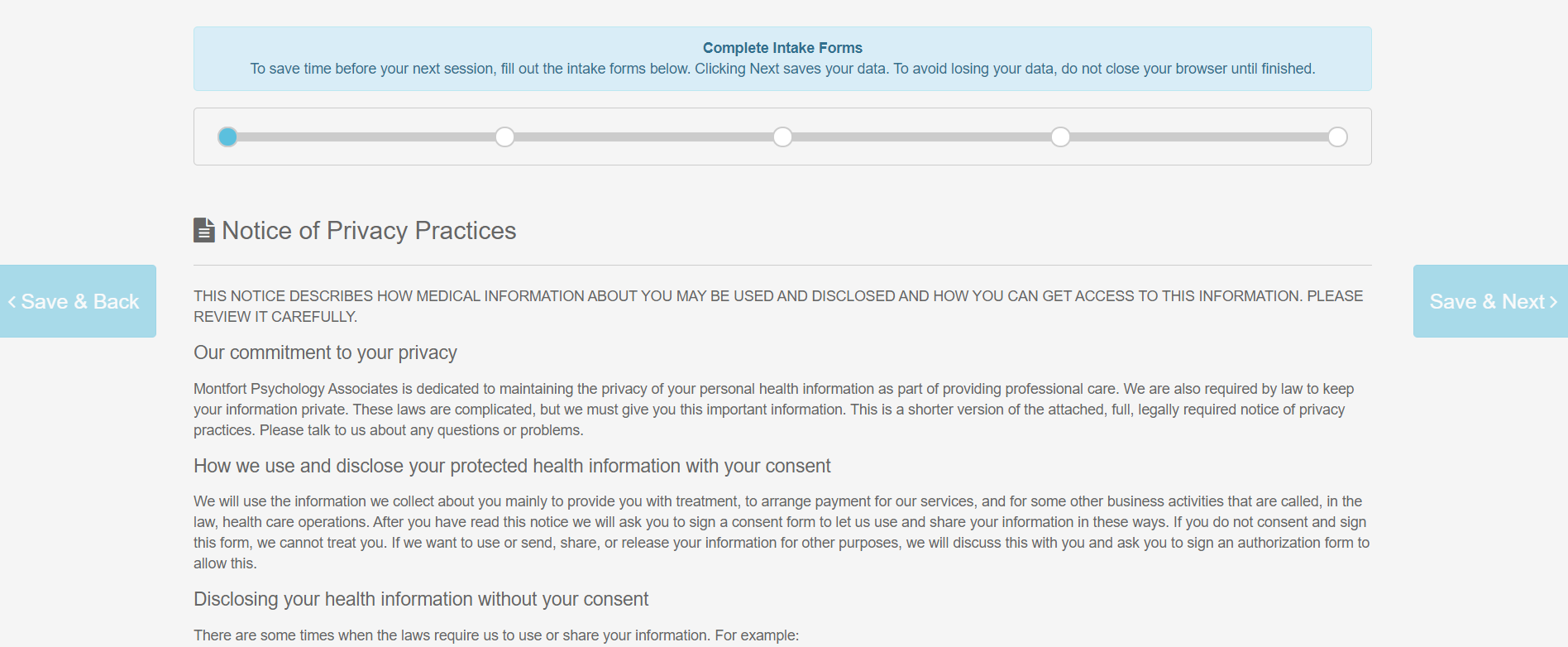
Click the green “Complete Intake Forms” button to proceed.

If you accidentally close this box or do not see it, scroll to the very top of the page and click where it says “Forms”:

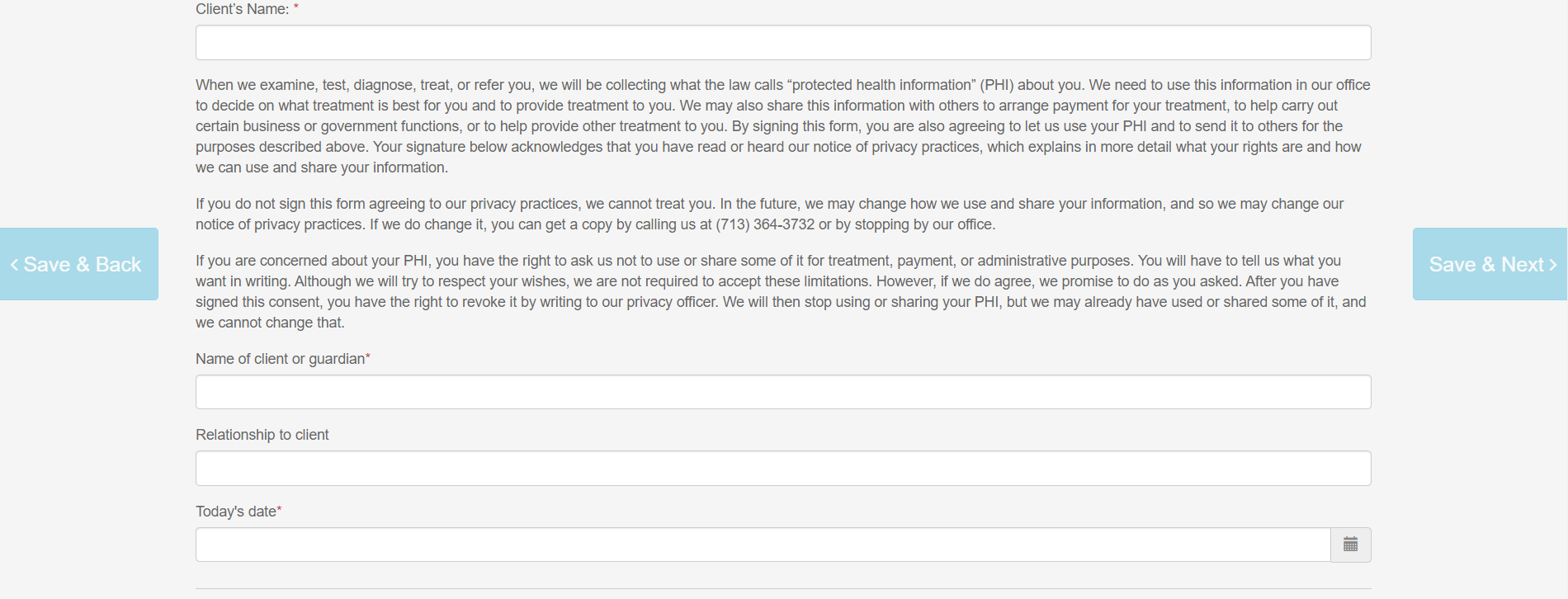


1. Clicking either of those buttons will take you to some online intake forms that we have created for your convenience. *\*\*Please note: This guide was created with our STANDARD forms. In some cases, depending on the nature of your case and requested services, we may make changes to the number, order, and type of forms we ask you to complete. Please complete all forms presented to you. If you think a form has been included by mistake, please contact* [*nmontfort@montfortpsych.com*](mailto:nmontfort@montfortpsych.com)*.\*\**

One of these forms is titled “Notice of Privacy Practices”



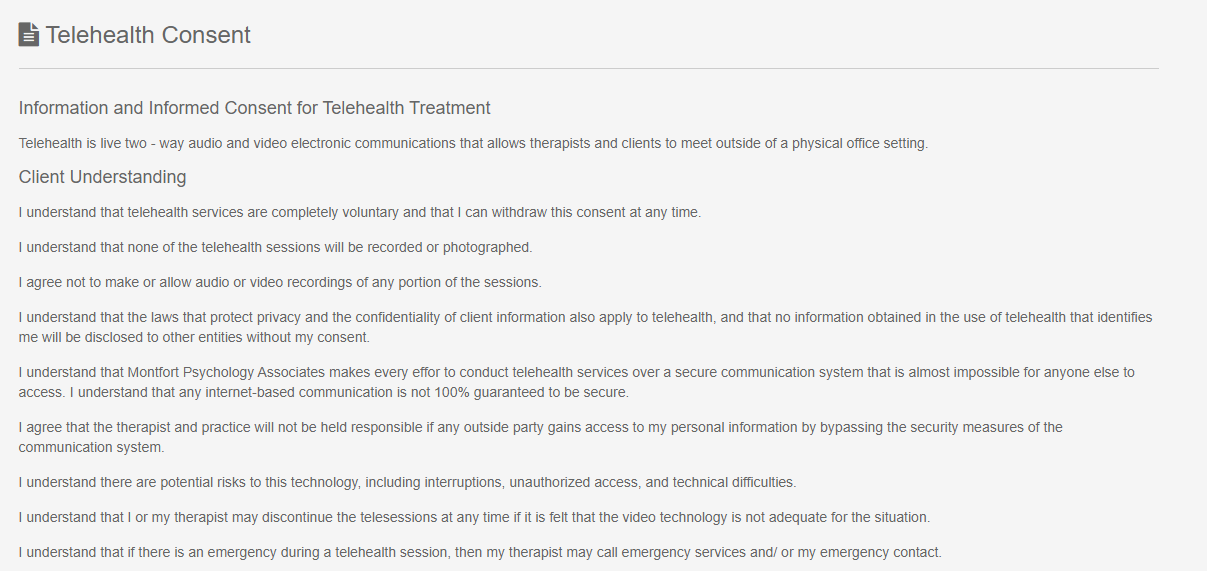
Please read this document carefully and be sure to scroll to the bottom of the page. When you reach the bottom, you’ll see several places for you to enter text. Type your responses into each space and click “Save & Next >” button on the far RIGHT of the page.



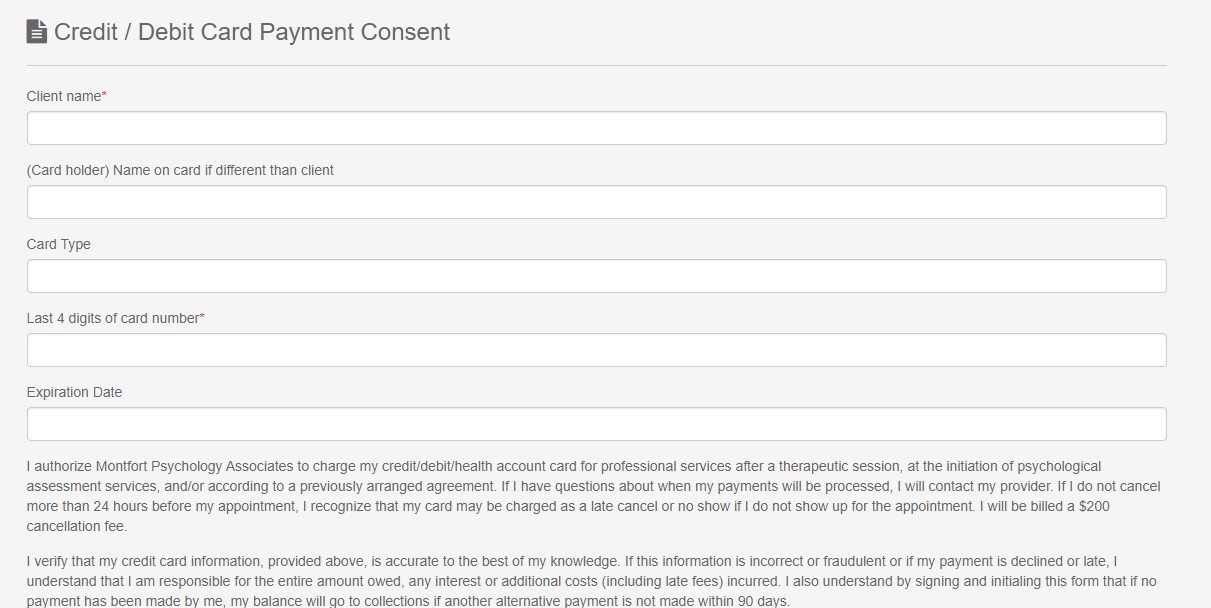
The next document is called “Information for Clients.” This lengthy document describes our company, its services, our policies, etc. Please read this document and enter your signature at the bottom, as before. (Note: due to the length of the document, you may wish to print your own copy – about 15 pages – for future reference.) You will be able to print a copy of all forms at the end of the process.

As before, click “Save & Next” on the right of the page when ready.

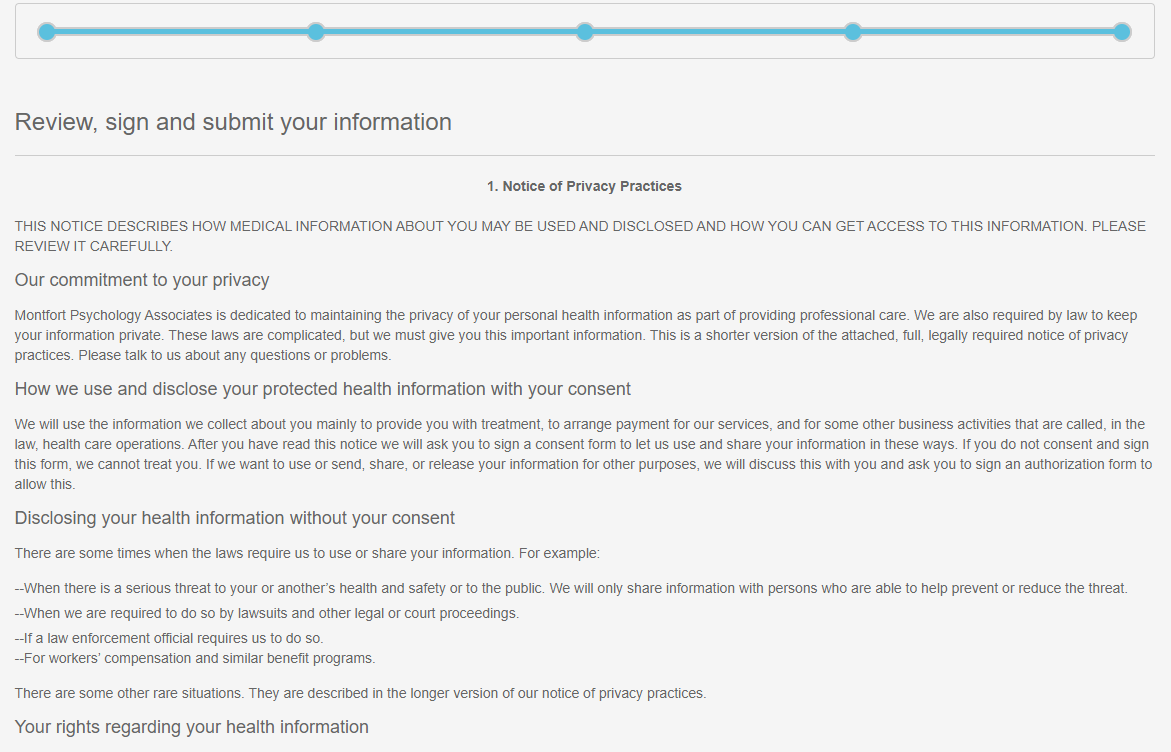
Repeat with the Telehealth Consent form



And Credit/Debit Card Payment Consent:

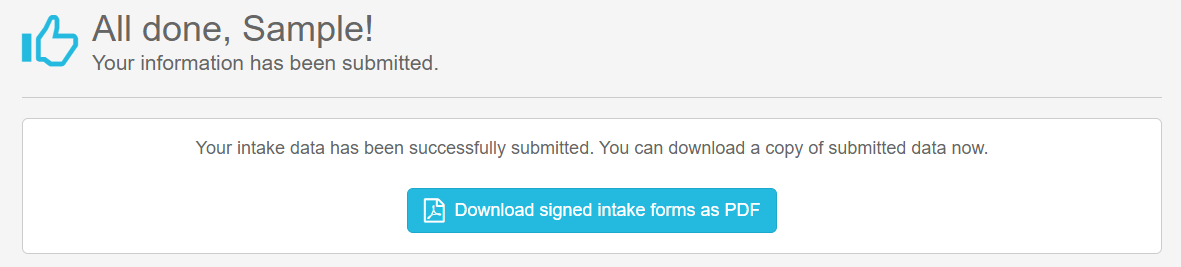


1. When all forms have been completed, you will see a review page (Note the blue progress bar at the top is blue all the way across.)



Please review your responses and sign at the bottom of the page and click “Save Signature.” Once your signature is saved (you will see a small thumbnail image to the top right of the large window), click “Sign & Submit” at the bottom of the page.

1. Congratulations! You have finished the process. You will see a confirmation page like this:





If desired, click the button to print a copy of your signed forms. Dr. Montfort will receive an email informing her that the forms have been completed and will be in touch with more information. Thank you! We look forward to working with you!

