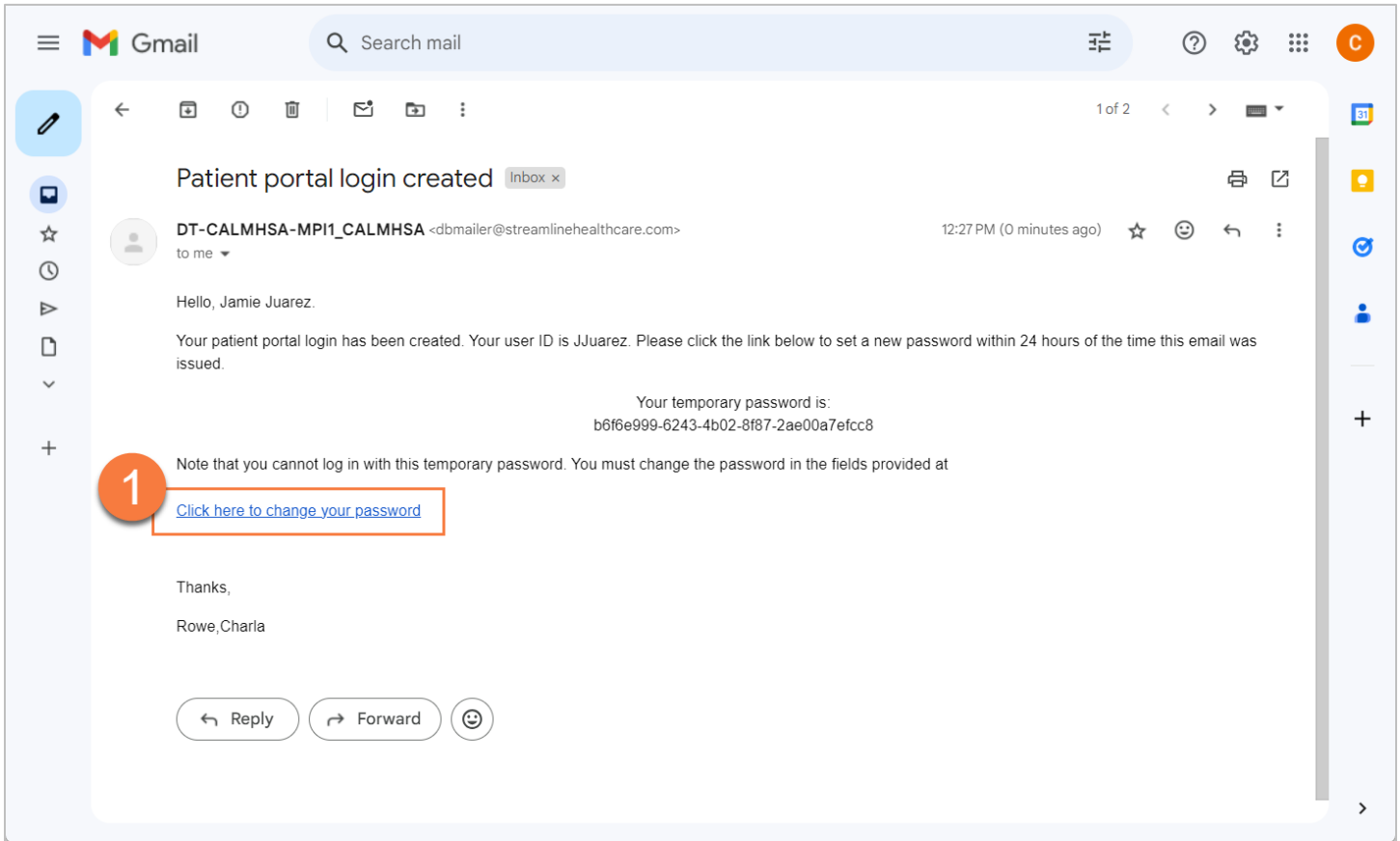


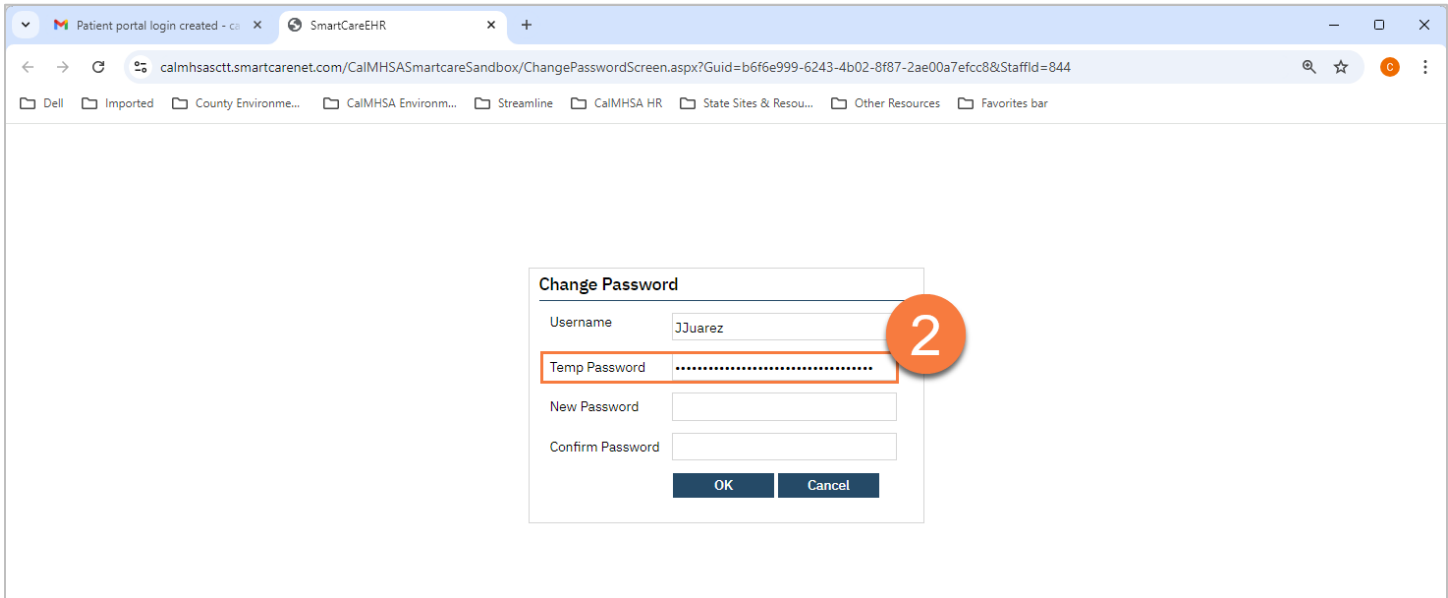
What Happens When You Get a Patient Portal Account

When you decide to get a patient portal account, you can expect the following:

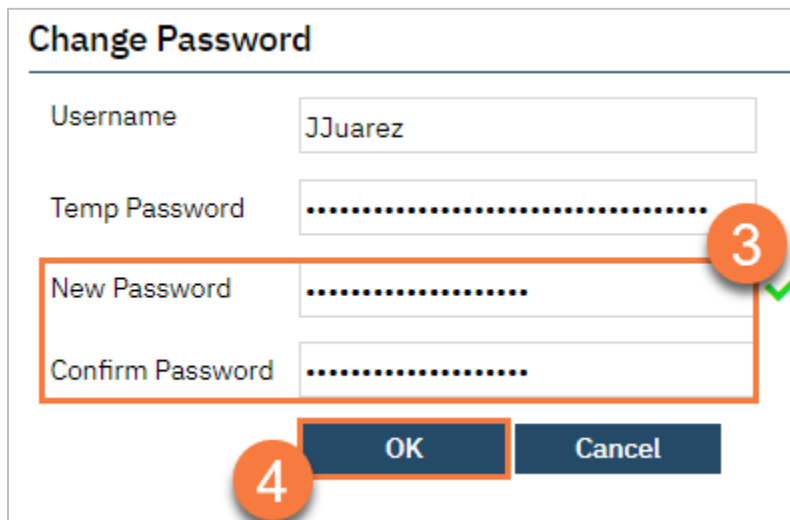
1. You will receive an email to the email address on file. You will be automatically given a temporary password and will be asked to change your password. **Click the link** to do so.



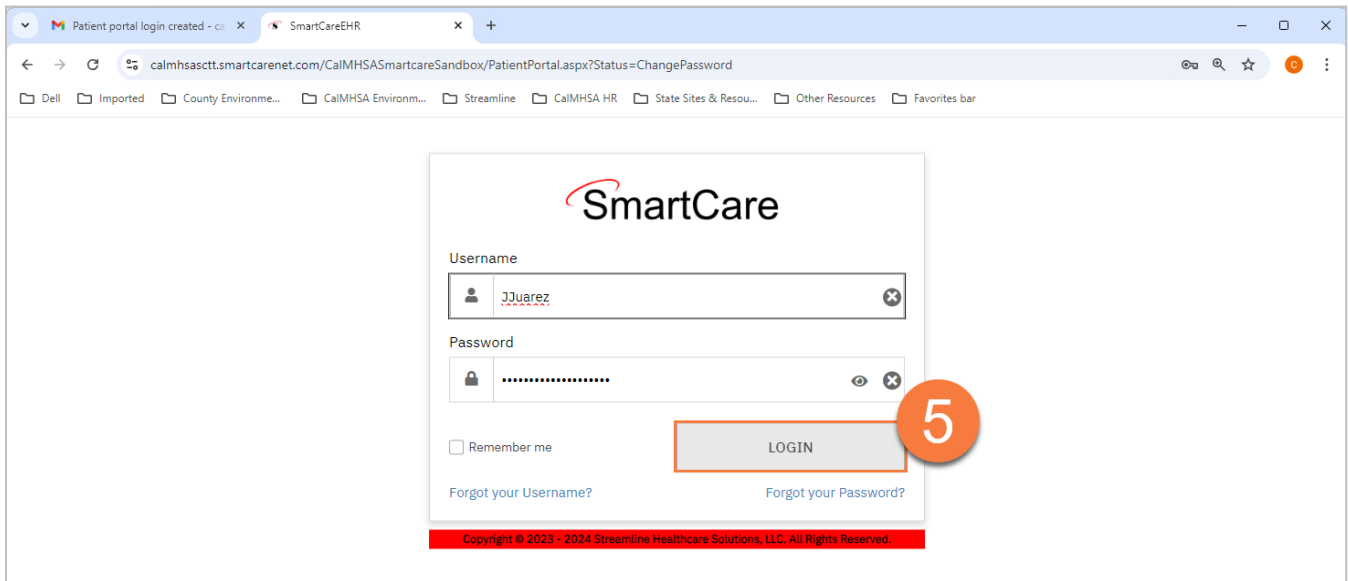
- This takes you to a “Change Password” page. The temporary password will already be entered in the “Temp Password” field, so you don’t need to re-enter it.



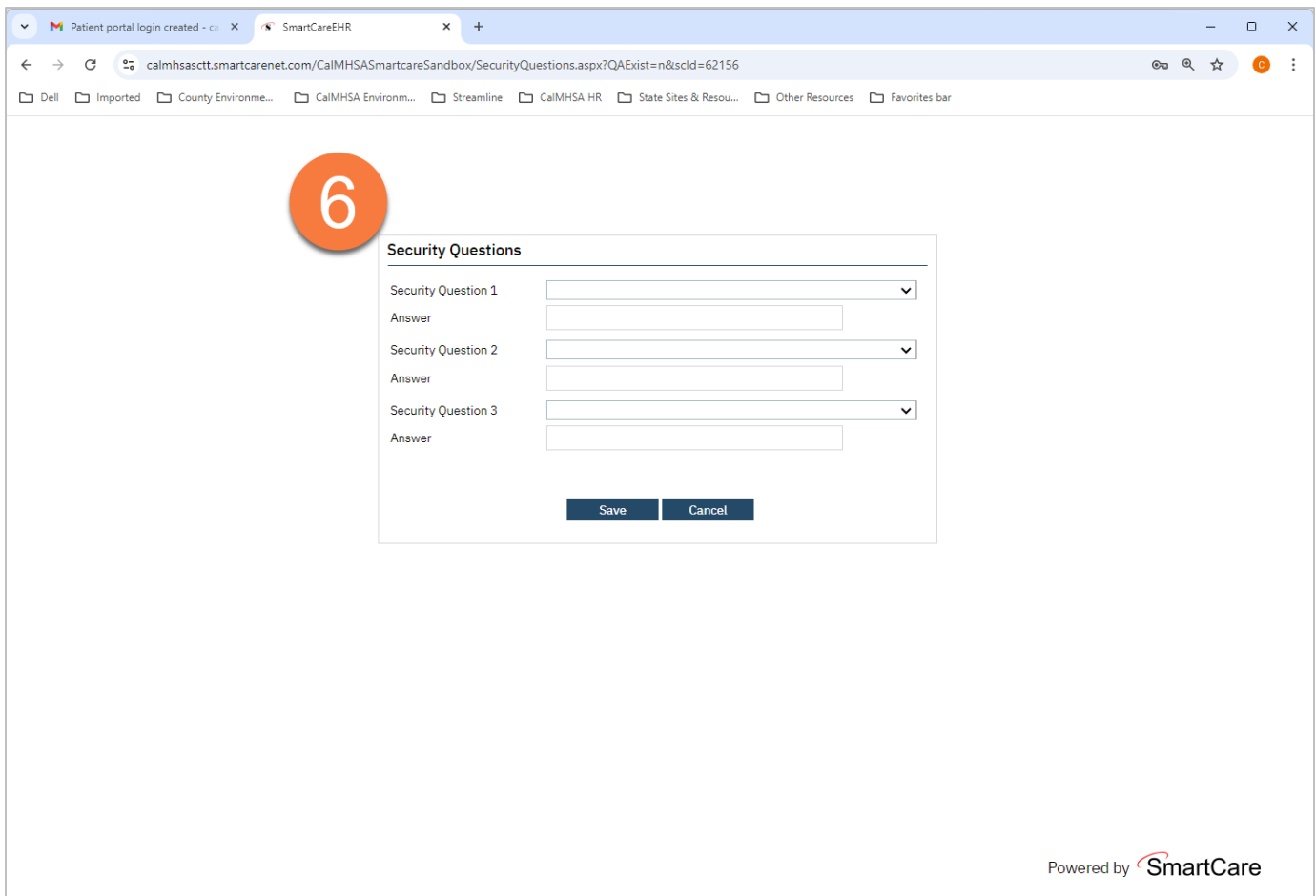
3. **Create a new password** by typing it in the “New Password” field. Then type it again in the “Confirm Password” field.
4. **Click OK.**



5. This will take you to a login screen. Your username and your new password will be entered automatically, so you don't have to enter them again. **Click Login** to log in to the Patient Portal. We recommend that you bookmark this page and take note of your username.



6. This will take you to the Security Questions setup screen.



7. **Set up your security questions.** Select a security question from the drop-down list. Then type in the answer to that question. Repeat until you have 3 question and answer pairs. When you next log in, after entering your username and password, you'll be asked one of these questions to confirm your identity.
8. **Click Save.**

Security Questions

Security Question 1 In what city were you born? ▼
 Answer

Security Question 2 In what city was your father born? ▼
 Answer

Security Question 3 In what state was your mother born? ▼
 Answer

Save Cancel

9. This will log you into the Patient Portal. You'll start on the Dashboard screen. Here, you can see things like upcoming appointments, unread messages from your providers, and a summary of your current contact information.

SmartCare My Dashboard

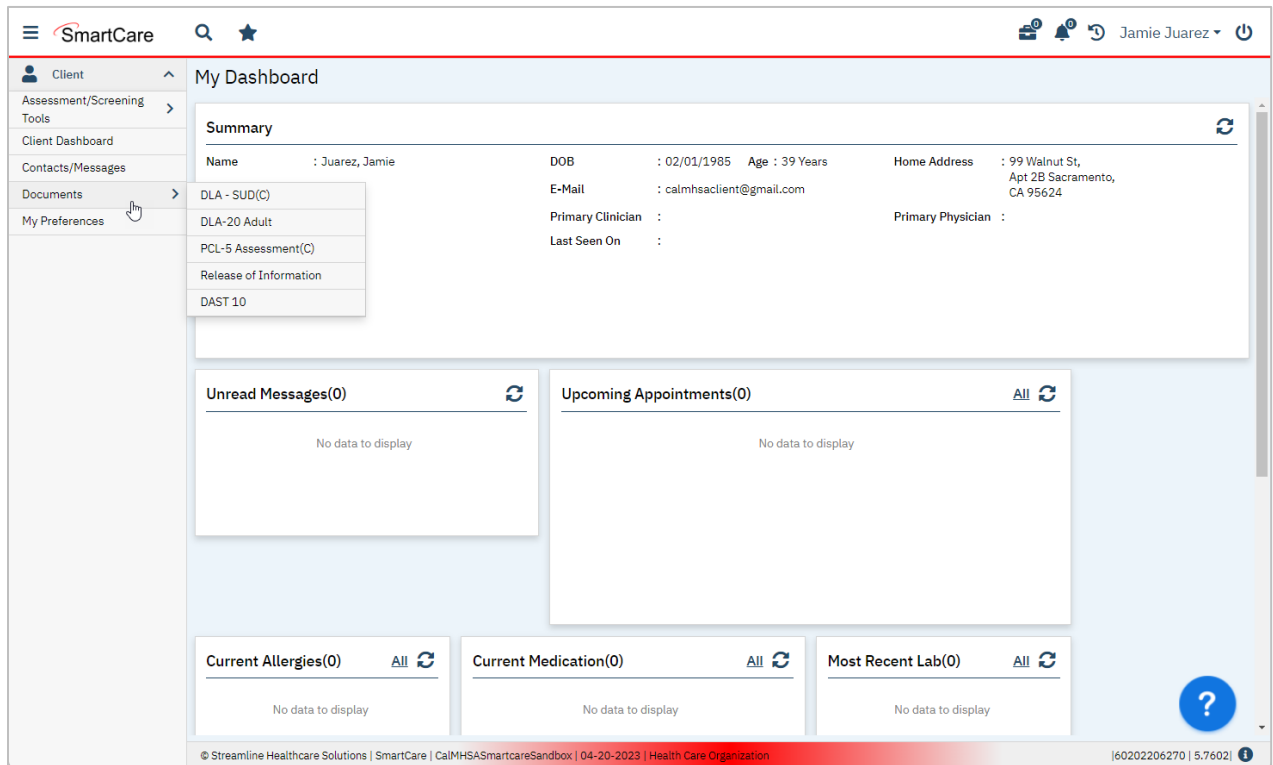
Summary

Name	: Juarez, Jamie	DOB	: 02/01/1985	Age	: 39 Years	Home Address	: 99 Walnut St, Apt 2B Sacramento, CA 95624	
Home Phone	:	E-Mail	: calmhsaclient@gmail.com					
Emergency Contact	:	Primary Clinician	:				Primary Physician	:
Current Balance	: \$0.00							
Last Seen On	:							

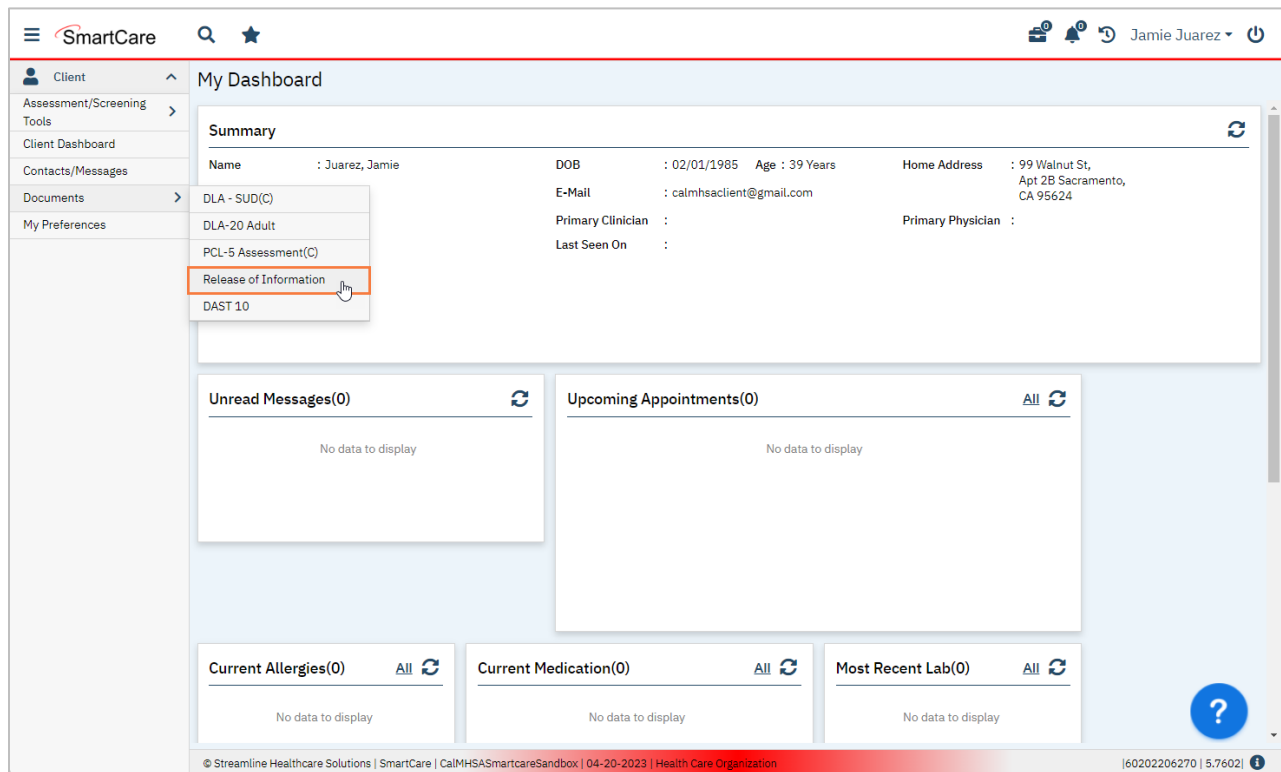
Unread Messages(0) | Upcoming Appointments(0) | Current Allergies(0) | Current Medication(0) | Most Recent Lab(0)

© Streamline Healthcare Solutions | SmartCare | CalMHSA Smartcare Sandbox | 04-20-2023 | Health Care Organization | 60202206270 | 5.7602

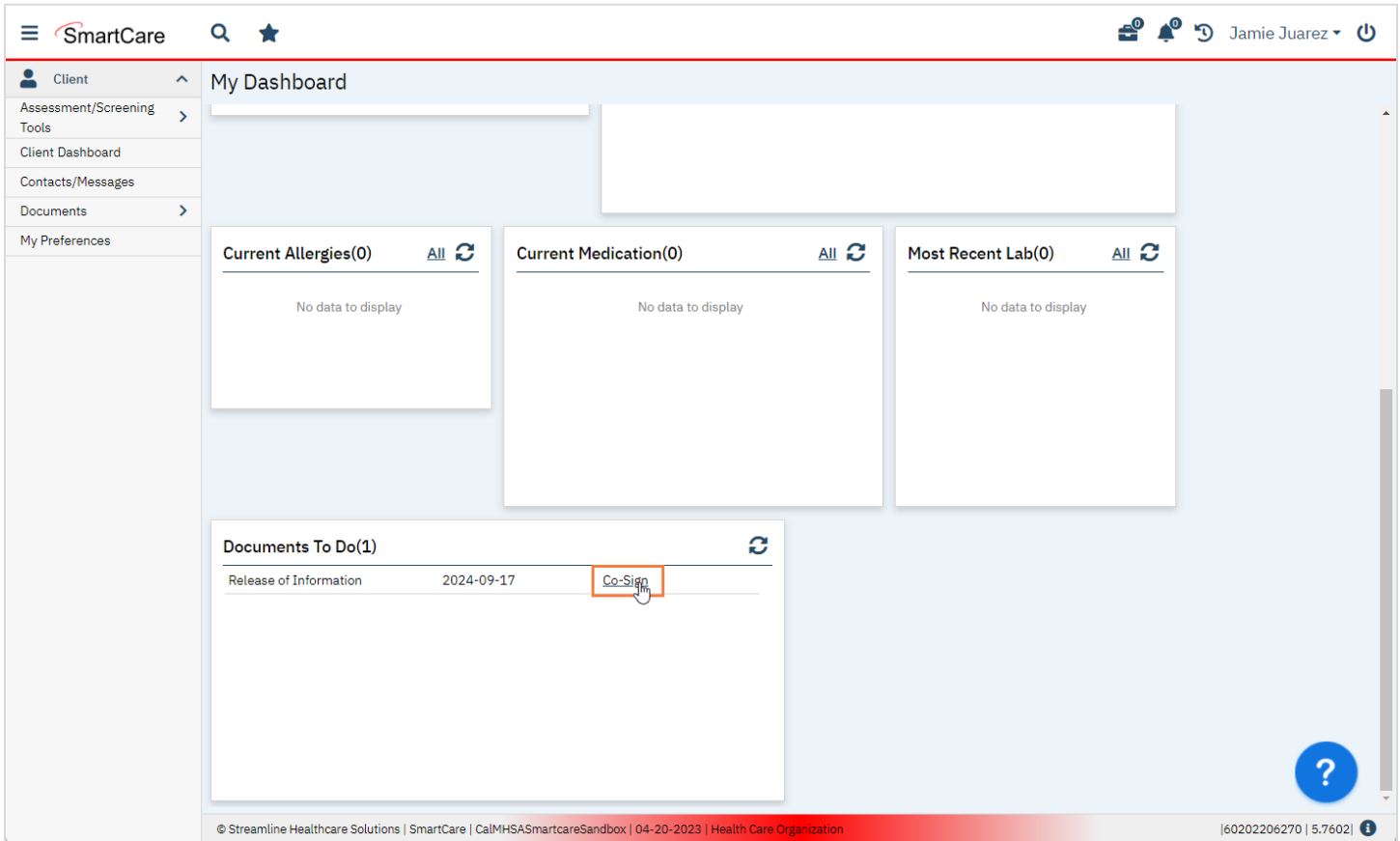
10. On the left side of the screen is a menu. You can hover over options, which will create a fly-out menu.



11. Click on the item you want to view.



12. There's also a "Documents To Do" section on the dashboard. This will show any documents that you may need to co-sign. Click on the "Co-Sign" link to open that document.



13. This will bring you to the document you are meant to sign.

How to Sign a Document

1. On your dashboard, find the “Documents To Do” section. This will show any documents that you may need to co-sign. Click on the “Co-Sign” link to open that document.

The screenshot displays the SmartCare patient portal interface. At the top, the 'SmartCare' logo is on the left, and user information 'Jamie Juarez' is on the right. A left-hand navigation menu includes 'Client', 'Assessment/Screening Tools', 'Client Dashboard', 'Contacts/Messages', 'Documents', and 'My Preferences'. The main content area is titled 'My Dashboard' and features three summary cards: 'Current Allergies(0)', 'Current Medication(0)', and 'Most Recent Lab(0)', each with a refresh icon and the text 'No data to display'. Below these is a 'Documents To Do(1)' section containing a table with one entry: 'Release of Information' dated '2024-09-17'. A 'Co-Sign' link is present in this row, highlighted with a red box and a red circle containing the number '1'. A blue question mark icon is located in the bottom right corner of the dashboard area. The footer contains copyright information for Streamline Healthcare Solutions and the date 04-20-2023, along with a version number 60202206270 | 5.7602.

- This will bring you to the document you are meant to sign. In the upper right corner of the screen, **click on the Plus icon.**

The screenshot shows the SmartCare patient portal interface. The top navigation bar includes the SmartCare logo, search, and user profile (Jamie Juarez). The left sidebar contains navigation options: Client, Assessment/Screening Tools, Client Dashboard, Contacts/Messages, Documents, and My Preferences. The main content area displays a document titled "Release of Information" for Client ID 1123, effective 09/17/2024, signed by Staff, Clinician. The document is a PDF titled "PdfBytesHandler.axd" and contains the following text:

Client ID: 1123 Released To/From: McCoy, Bones Page 1 of 3

AUTHORIZATION TO OBTAIN/DISCLOSE PROTECTED HEALTH INFORMATION

Client Information

Client Name:	Juarez, Jamie	Client ID:	1123
DOB:	02/01/1985	Effective Date:	09/17/2024
Program:	MH Adult Outpatient		

General

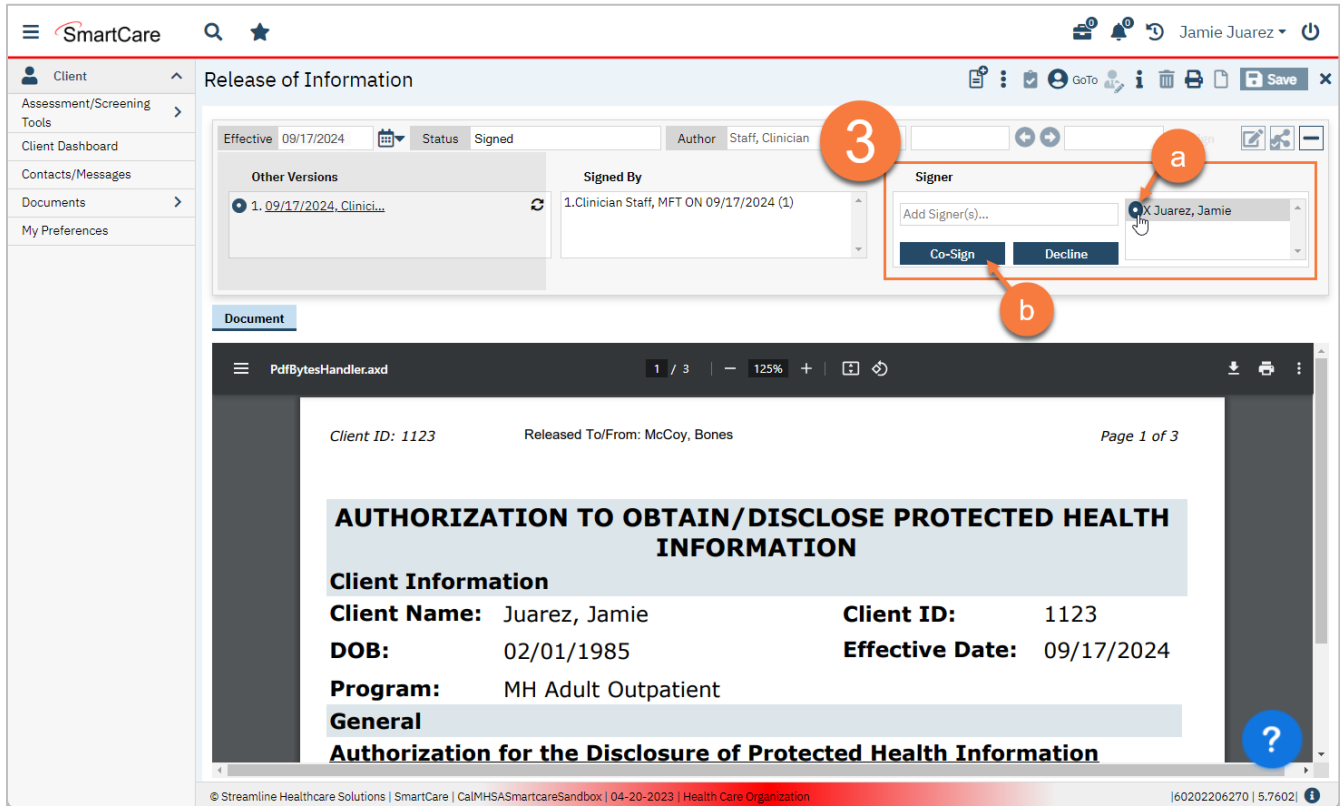
Authorization for the Disclosure of Protected Health Information
By signing this form below, I am authorizing the disclosure of my protected health information to one or more persons for the purposes specified on this form. If I agree, I understand this may include information about any substance use disorder treatment I have received.

Release To / Obtain From

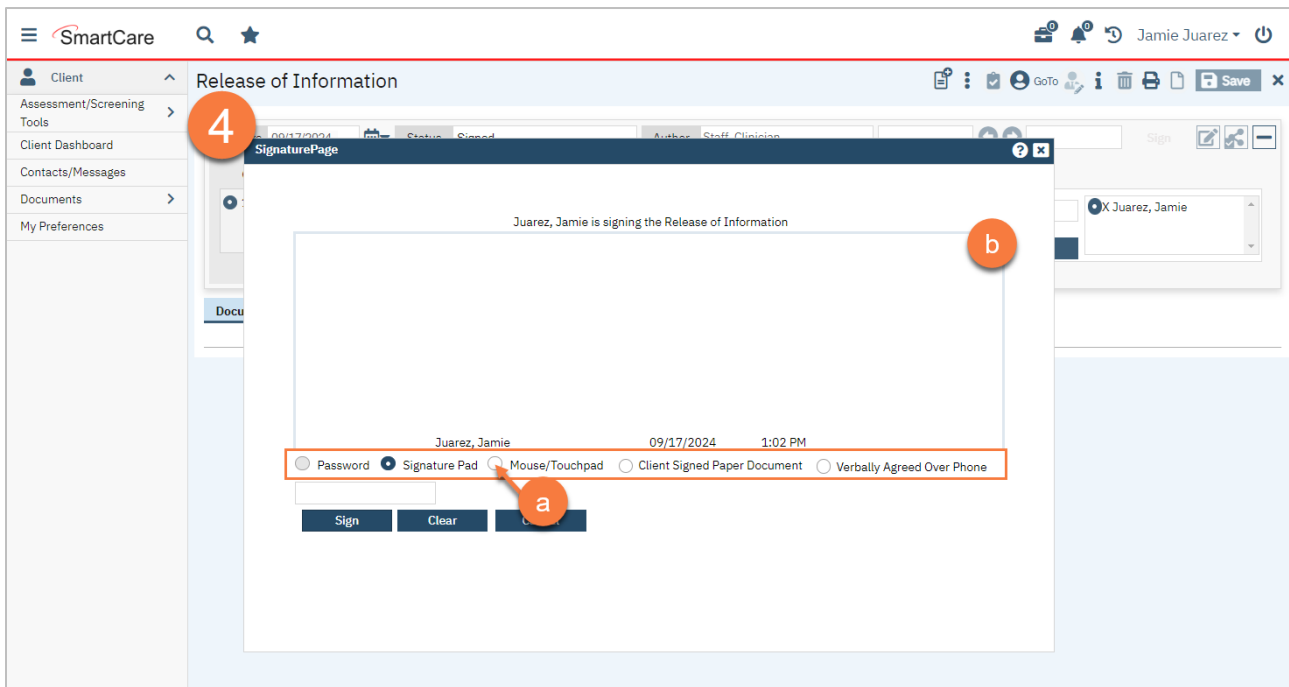
The document viewer shows a plus icon in the top right corner, which is highlighted with a red circle containing the number 2, indicating where to click to sign the document.

© Streamline Healthcare Solutions | SmartCare | CalMHSA Smartcare Sandbox | 04-20-2023 | Health Care Organization |60202206270 | 5.7602|

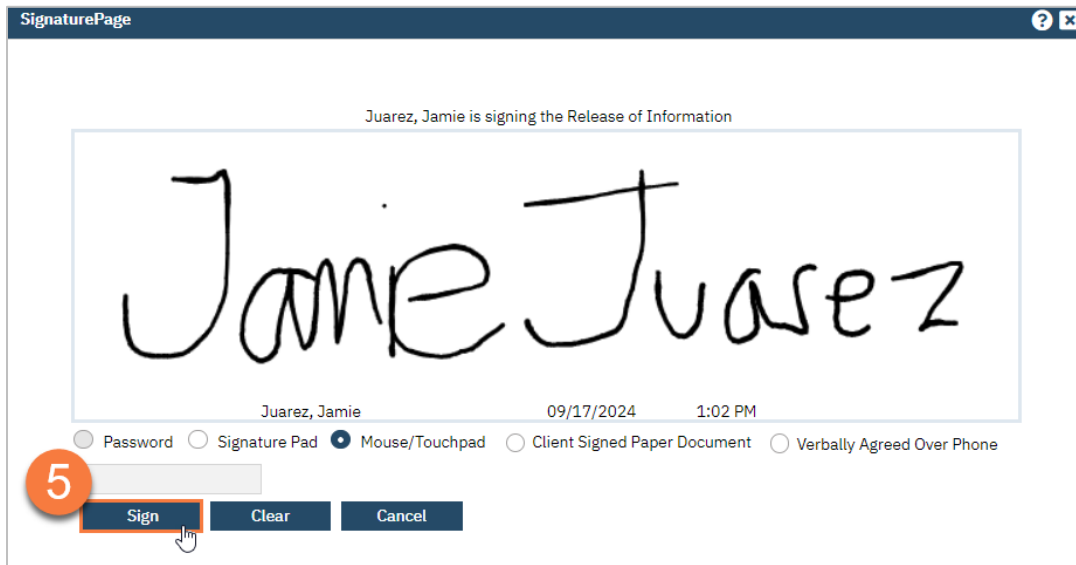
- This will expand out the document ribbon. In the Signer section, select your name by clicking on the circle next to your name (a). Then click the Co-Sign button (b).



- This will bring up a popup window. Select how you're going to sign. We recommend selecting "Mouse/Touchpad" (a). That will allow you to draw your signature in the box provided (b).



- Once you're happy with your signature, click the "Sign" button. If you want to erase your signature and try again, click the "Clear" button. If you want to cancel your signature, click the "Cancel" button.



6. This will take you back to the document. You can now see that you've signed the document in the "Signed By" section. This will remove the document from your "Documents To Do" section on your dashboard.
7. You can **close the document** by clicking on the **Close (X)** icon in the upper right corner of the screen.
8. You can also **go back to your dashboard** by clicking on the **SmartCare** icon in the upper left corner of the screen.

