eLogic Genesis Client Portal Rollout Agenda

All sessions are conducted via webinar with attendees present. Multiple sessions for each phase will be offered to accommodate schedules. A poll will be sent to the Agency Administrators and Liaisons to collect availability for sessions. All sessions will be recorded for later reference and for those who are not able to attend.
Please note that some items in this outline may be subject to change.

Liaisons must be present for all training and demonstration sessions.

Phase I - Introduction to the Client Portal; Agency Admin Preparation

Agency Admin Preparation

- Terms and Conditions
- Designate the Purpose and Set Expectations for Clients
- Designate at least one Client Portal Liaison
- Demonstration of the Client Portal in its entirety [SESSION 1 - 9/24/20]: *checklist spreadsheet is provided prior to the webinar*
    - Show the process from start of setup to finished portal that is ready for clients
    - Agency Admins and Liaisons become familiar with each optional feature - must decide which they will use in Phase II for implementation
        - Fill in checklist spreadsheet
- Each organization that uses the Client Portal will need to designate at least one Client Portal Liaison. Liaisons will be responsible for a handful of duties, including the following:
    - Learning and understanding the entire Client Portal setup process
    - Performing basic troubleshooting steps regarding the Client Portal with both your organization's staff and clients
    - Training new staff members:
        - How to interact with the Client Portal to then teach their clients
        - How to create Client Portal accounts for clients
        - Client Portal basic troubleshooting
    - Knowing when to escalate any issues or questions regarding the Client Portal to the eLogic Genesis team
- Create demo email address to test Client Portal setup in Phase III and use for internal training/reference

Due by Friday, October 2:

1. **NOTIFY CAMP/ELOGIC GENESIS TEAM IF YOUR ORGANIZATION WILL OPT IN OR OUT**
    a. *Any organizations who do not respond by this date will forfeit participation in the Client Portal rollout*
    b. *Those who opt in will be sent a poll the week of October 5th to obtain availability for each upcoming session*
2. **INFORM CAMP/ELOGIC GENESIS TEAM:**
    a. Who will be the Agency Administrator(s) overseeing the rollout and attending the applicable sessions? *(please include full name and email address)*
    b. Who will be your Client Portal Liaison(s)? *(please include full name and email address)*
3. **FILL IN THE PROVIDED SPREADSHEET "[INSERT AGENCY NAME] eLogic Genesis - Client Portal definitions and checklist" → "Checklist" tab**
    a. *Use as a reference as we progress through the rollout*

Phase II - Agency Admin and Client Portal Liaisons

Revisit Current Settings; Review New Optional Features, Implement; Liaison Training

Agency Admin & Client Portal Liaisons: Revisit Your Current Settings - *Includes Training and Reinforcement of Previous Training [SESSION 2] - Dates TBD*

- Roles and Permissions
    - Create new roles for staff who will interact with various Client Portal features
    - Designate which roles will have access to multiple types of Client Portal role permissions (could require re-working of existing roles based on who Agency Admins wish to grant access)
        - Client Account Invitations
        - Manage Applications to the Organization
        - Client Program Application Management
    - Understanding how to create tabs and add intake fields
        - The functionality is exactly the same when selecting intake fields available to clients using the Portal
- Programs and Program Applications
    - Identify which programs should be available to clients to apply for from the Client Portal
    - Setting required data points for each program application
    - Additional Program Settings
        - Create or designate a program that clients can apply to become a client within the organization
        - Default Program Length?
        - Default Checkup Date?
    - Program Options
        - Use waitlist?
            - Capacity for enrollment?
        - Agency Enrollment Program?
        - Client Portal Eligible?
- Notifications
    - Revisit staff notifications
        - General and specific to all staff who will interact with any Client Portal features
    - Set client notifications?
- Forms
    - Identify if/which applications require forms; create forms
- Custom Fields
    - Used in:
        - Demographic fields available to clients using the Client Portal

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            - Forms

Agency Admin & Client Portal Liaisons: Review New Optional Features, Implement - *Includes Training [SESSION 3] - Dates TBD*

- Q&A for any features indicated as "Not Sure" in checklist
    - Provide consulting for each question
- Client Portal Settings
    - General settings
        - Enable/disable specific features
            - Learn what each feature does in the Client Portal compared to what a staff member can do in the client record
    - Demographics
        - Identify and select necessary demographic fields available to clients using the Portal
            - Cross reference with Programs to ensure all required information fields are available
    - Global record invitation link?
        - How will it be distributed?
- Waitlists and Designating who will manage them; provide training
    - Global Invitation Waitlist?
    - Agency enrollment waitlist?
    - Program enrollment waitlist?

Client Portal Liaisons: Training [SESSION 4] - *Dates TBD*

- Must have a good understanding of how the Client Portal functions, both client facing and staff facing
- Must understand how the Client Portal is established and how to make any necessary adjustments
- Must understand the process well enough to conduct basic troubleshooting for both staff and clients
- Must understand the Client Portal to provide additional training and support on-site to staff
- Training topics include:
    - Client Portal account creation and basics
    - How to interact with, navigate, and use the Client Portal
    - Key troubleshooting tips
    - Know when to escalate an issue to an eLogic Genesis representative for additional assistance

Phase III - All Staff

Finishing Touches & Agency Admin and Liaison Final Check In; Final Training for Liaisons; Training for Standard Users

Agency Admin & Client Portal Liaisons: Final Check-In and Finishing Touches [SESSION 5] - *Dates TBD*

- Enable Role Permissions
- Agency name is entered correctly
- Create demo Client Portal account using fake email to test setup
    - Keep for future use, provide login credentials to all necessary staff
- Establish how Terms and Conditions will be provided to clients for review
- Q&A

Client Portal Liaisons: Final Training [SESSION 6] - *Dates TBD*

- Review of previous training topics
- Review of common troubleshooting steps
- Feel confident helping staff (Admins and non-admins) and clients use and interact with the Client Portal
- Learn how to teach clients how to use the Client Portal
    - Account creation
    - Setting password
    - Logging in
        - Password reset
        - In app password reset
    - Forgotten password
    - Interacting and using the client portal
- Any additional requests or remaining training items
- Q&A

Client Portal Liaisons & Staff who will be interacting with the Client Portal (Agency Admins encouraged to attend): [SESSION 7] - *Dates TBD*

- Review all users' Notification Settings to complete the cycle for staff and client interaction via the Client Portal
- General training for all staff who will be creating Client Portal accounts or interacting with any Client Portal or Waitlist tools
    - Creating client accounts (Accurate email address)
    - Know when a client has been invited
    - Know when a client has completed account setup

    - Resend Client Portal invite to client
    - How to interact with, navigate, and use the Client Portal
- General training for staff to teach clients how to use the Client Portal
    - Account creation
    - Setting password
    - Logging in
        - Password reset
        - In app password reset
    - Forgotten password
    - Interacting and using the client portal
- Common troubleshooting tips
- Q&A