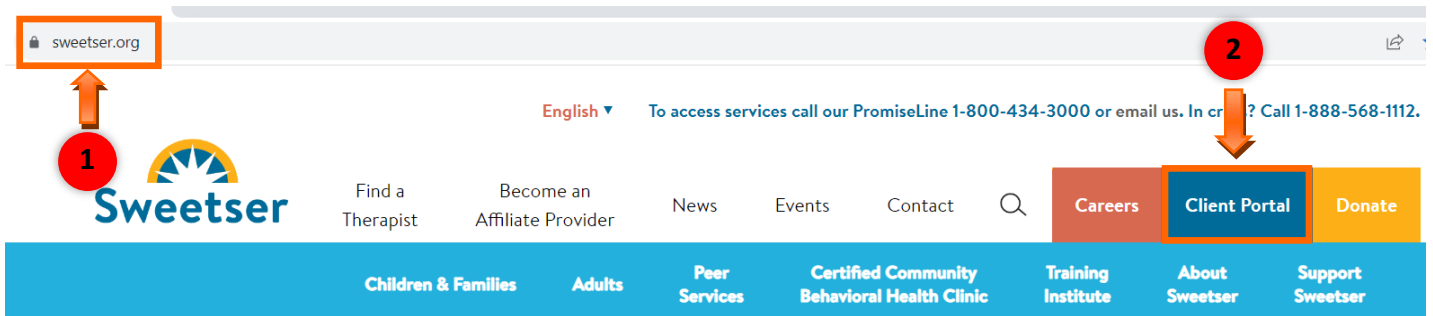


Navigating Sweetser's Client Portal

You will receive an email from Sweetser welcoming you to the Client Portal, with information about what is available in the Portal, and how to access your information.

★ In order to set up your account, you will need to log in with the temporary password that is provided to you in the welcome email. The steps for account set up are below. ★



1. Navigate to www.sweetser.org
2. Click on the tab at the top of the page labeled **Client Portal**
3. Click **Login Here**
4. **Sign in** with email address and temporary password provided in the Welcome email.

Client Portal

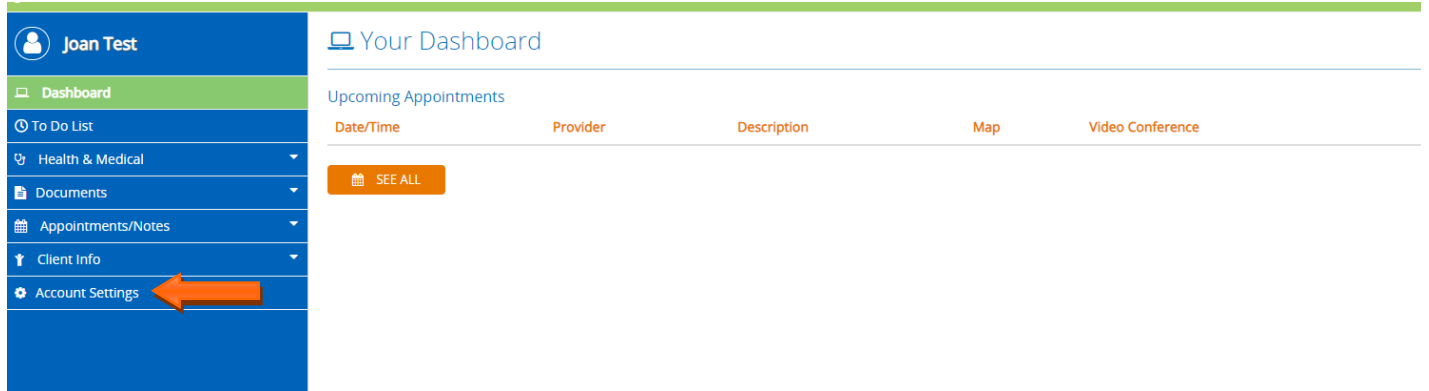
LOG INTO YOUR CLIENT PORTAL

A sign-in form titled 'Sign in' with the URL 'https://apps.welligent.com'. It has two input fields: 'Username' and 'Password', both highlighted with yellow boxes. At the bottom, there are two buttons: 'Sign in' (blue) and 'Cancel' (white). A red circle with the number '4' and an arrow points to the 'Sign in' button.

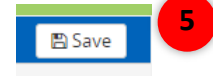
[Download Login Instructions Here](#)

Navigating Sweetser's Client Portal

- Once you are logged in, you will see **Your Dashboard**.
- Navigate to **Account Settings**, to set up your password and create your security questions and answers.



1. Choose a password that you will remember for future portal access.
2. Confirm the password by re-entering it.
3. Select a challenge question.
4. Write in the answer to the challenge question you chose. You will need to select a second challenge question and answer as well.
5. Once you have completed these fields, be sure to click **Save**, in the upper right-hand corner.



The screenshot shows the 'Account Settings' form for Joan Test. The form fields are: Account First Name, Account Last Name, Linked Clients, Email Address (Will Be the Account Name), Account Password, Confirm Password, Challenge Question, Challenge Response, Challenge Question(2), Challenge Response(2), Turn Off Email Alerts, Last Login Date, Password Changed On, Date Account Created, and Translate Portal. Red circles with numbers 1-4 and orange arrows point to the password and challenge question fields.

Frequently Asked Questions

What is the client portal?

The client portal is similar to other portals you may access for healthcare needs; the Sweetser client portal will allow you to:

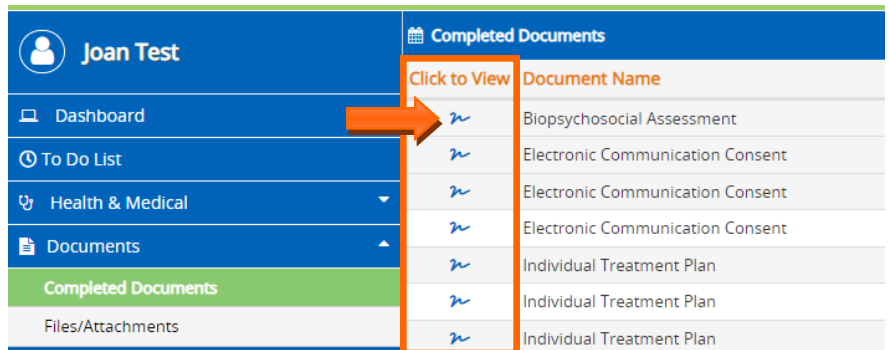
- View upcoming and past appointments with your provider.
- View and print billing statements.
- Access and sign documentation, like consent forms, treatment plans, and treatment plan reviews.
- View your demographic information, as well as contact information for individuals or providers you have given consent for Sweetser to contact as part of the services you receive.

How do I access the portal?

- Login instructions are part of this information packet, on pages 1-2. When you receive the email from Sweetser providing a link to the portal, you will have been given a temporary password to login and set up your account.
- You will be asked to change your password and set up security questions. Once your account is set up, any document that needs your signature will be sent to you through the portal.
- Once you've signed, you will have a copy for your own records in the portal, which you can view and print at anytime.

★ How do I print a document ★ from the portal?

First, navigate to the document you want to print, and click on the symbol beneath **Click to View/Sign**, to open the document. At the top of each document, **Print** will be there —click on it, and a dialog box will open, allowing you to print your document.



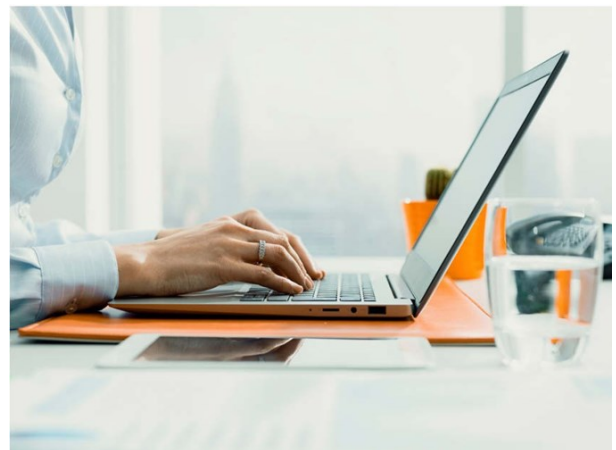
Frequently Asked Questions

I need to cancel an appointment. Can I do that in the portal?

Your provider does not have access to your portal. If you are unable to make it to a scheduled appointment, or you need to reschedule for another date and time, **please reach out to your provider directly.** Messages sent through the portal do not go to your provider—they are specifically to address questions or issue you may encounter while using the portal.

I forgot/lost my password. What do I do?

- If you forget or lose your password, simply email portal-info@sweetser.org to request a password reset. When making your request, please be sure to include the best contact information to reach you, as Sweetser Staff will verify your identity before resetting your password.
- Once you have confirmed your identity, you will receive an email with a new, temporary password, and once you log in, you will need to create a new password.



IMPORTANT NOTE ABOUT PASSWORDS:

Please do not share your login information with anyone. The information in the portal is confidential, and should only be accessed by the individual it belongs to.

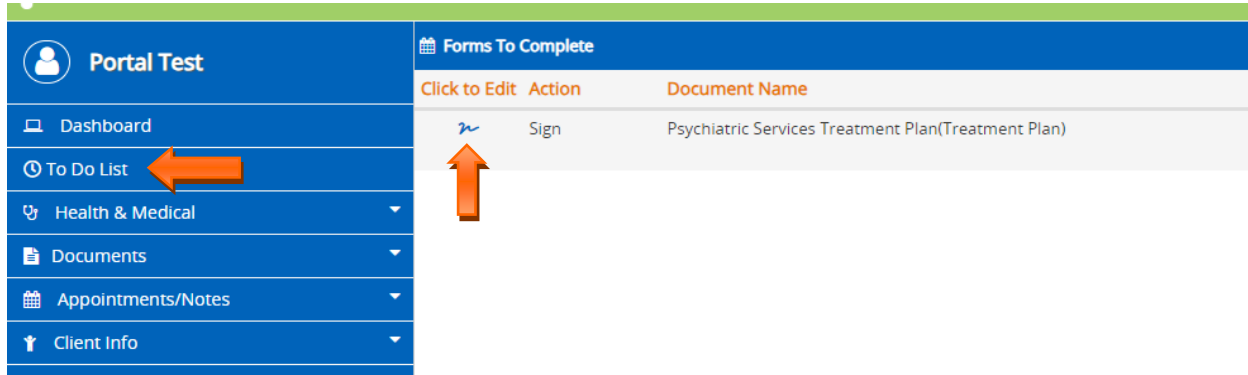
Be sure to use only letters/numbers in your password when creating your account.

Special characters (like ? & * ^ #) **will not work.**

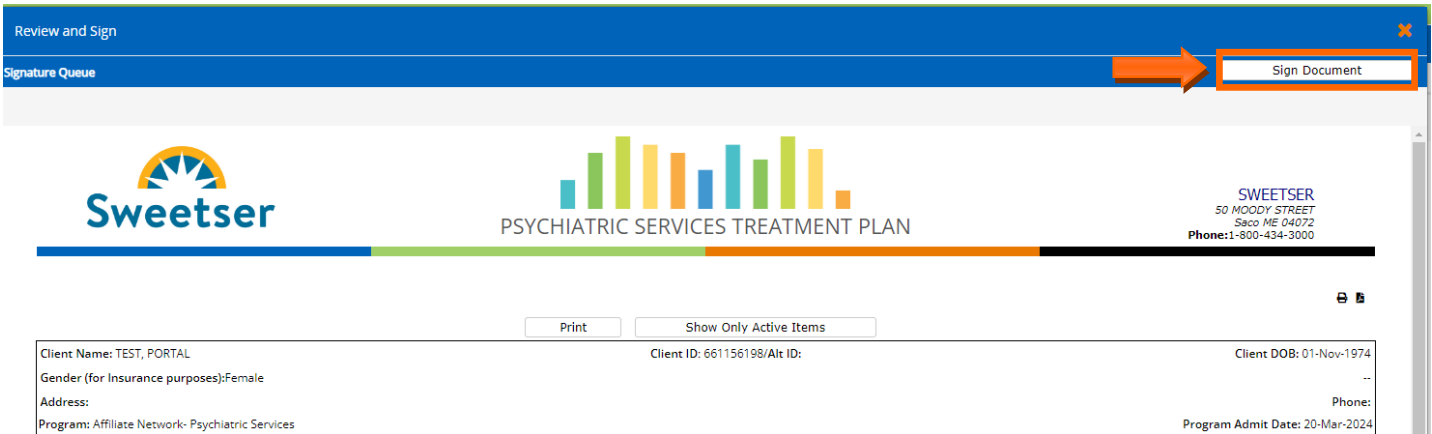
Frequently Asked Questions

How do I sign a Treatment Plan, Treatment Plan Review, or a Consent Form?

- Once you are logged into the portal, using the left-hand navigation, click on **To Do List** to display documents that need to be signed. Select the form and click on the blue 'squiggle' next to that document.

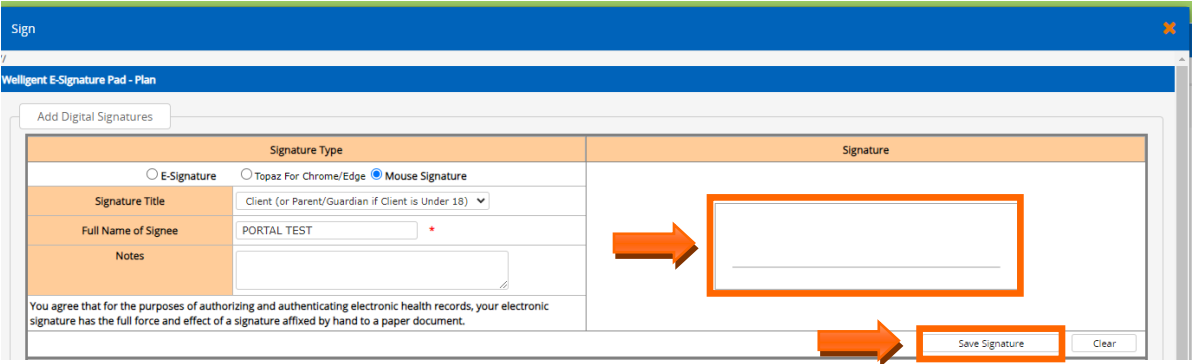


- When you have selected the form to be signed, a new window will open, displaying the plan. Click on the **Sign Document** button in the top right corner of the form.



- A signature dialogue box will open, allowing you to use your mouse or a trackpad on your laptop to sign.

Use your mouse, or the trackpad on your laptop, to sign in the signature box, then click **Save Signature**. You



will see a confirmation window that lets you know your signature was successful, and then a blank signature page window. **Close the blank signature page window once you have signed.** Your document is now complete.

