Tanager

Inspire. Empower. Heal.

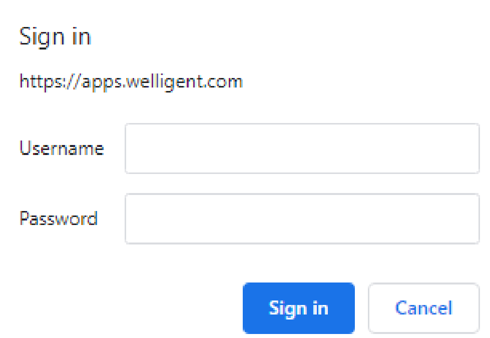
Welcome to the Tanager Client Portal!

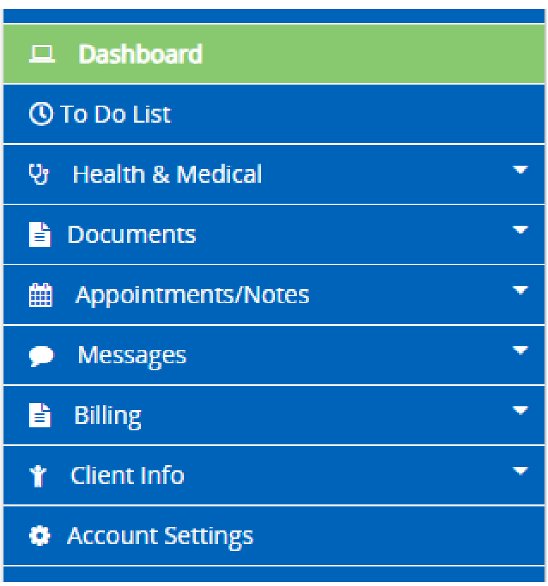
The Client Portal allows you access to sign forms, view and sign treatment plans, and make payments online.

Please note the Client Portal is not currently mobile phone friendly. You must access via a computer or tablet.

To log into the portal, go to www.tanagerplace.org, and click the Client Portal button on the upper right hand corner of the screen.

Enter your username and password using the information Tanager staff provided to you at the time of sign up. Please note that you cannot self-register for an account. Tanager staff are happy to create an account for you.





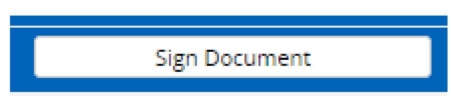
The Portal Menu on the left side of the screen allows you to navigate to different sections of the portal by click the applicable button.

The Dashboard provides quick links to your bill, upcoming appointments, and messages to staff.

To Do List allows you to view and sign consent forms, treatment plans, and other documents your provider has shared with you.

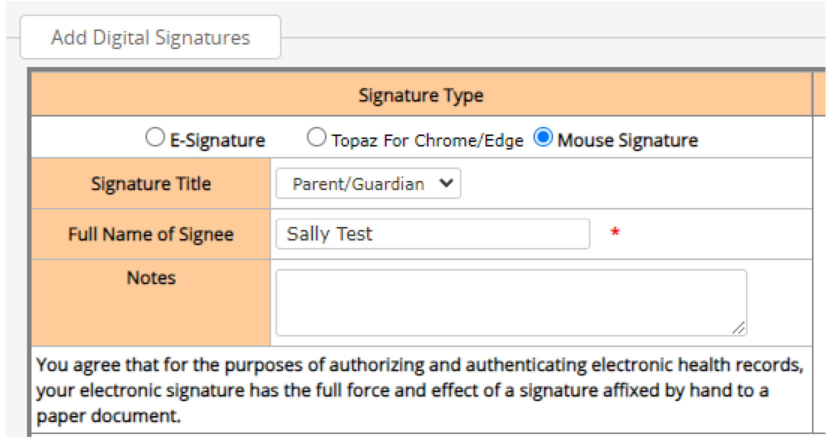
To view and sign documents, click **To Do List** from the menu on the left side of the screen.

A list of all consent forms or treatment plans will display. Look at the effective date column or date completed column to find the newest documents. Click the blue squiggle icon in the Click to View/Sign column when you locate a form you want to sign. Review the text. After your review, click the sign document button on the upper right hand corner of the consent.



Please note portal forms are read only. You can sign documents but are unable to make changes to the document. If you have questions or a document needs updates, please contact your service provider.

- Click the Mouse Signature button.



- Signature title dropdown: Change to Client (if you are over 18 and signing for yourself) or Parent/Guardian (if you are signing for a child under 18). Please note only a legal guardian may consent to treatment.
- Full Name of Signee: Type the first and last name of the person signing the form.

- Notes: This box may be left blank.
- Sign the signature line. This is most commonly done using a mouse on a desktop computer or using your finger on a tablet or touchscreen computer.
- Click Save Signature.
- A pop up message will indicate you have successfully signed the document. Click OK. The signatures collected section will show a date/time stamp for the signee.

Health and Medical provides a summary of your client face sheet, listing of previous appointments, and medical information if applicable.

Documents displays completed documentation including Daily Observation notes for clients in PMIC or ICF-ID, signed treatment plans, etc.

Completed Documents displays a list of all completed documents.

- Click the blue squiggle icon to view a document.

Files/Attachments displays any tools or information that Tanager may have shared for client reference. These are general information tools and are not specific to any client.

Appointments provides a listing of completed and upcoming appointments.

Messages allows you to send a secure message to your provider or ask a general question.

To send a new message, click Inbox, then click new in the upper right hand corner of the screen.

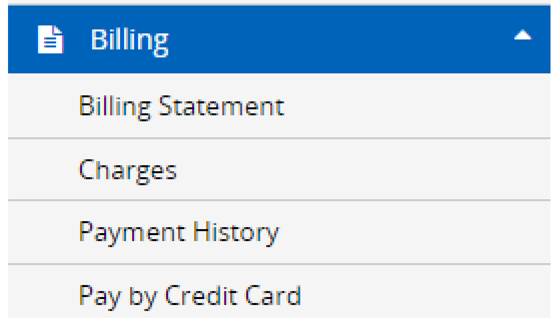
You may ask a general question with the default "to" recipient. You may send a message to your provider directly by selecting their name from the dropdown.

After completing your message, click send in the upper right hand corner.

Replies sent to you will show as new messages on the dashboard or by clicking the Messages→ Inbox button.

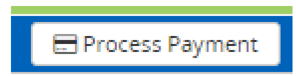
Billing provides access to your statement and payment history.

To make a payment: Click Billing→Pay by Credit Card



Complete all fields including:

- Name on card
- Address of card holder
- Card Type
- Credit Card Number
- Expiration Date
- Security Code found on the back of the card
- Amount you wish to pay in 00.00 format.
- Click process payment button found on the upper right hand corner of the screen.



You will receive a pop up stating your payment was successfully processed. Click OK.

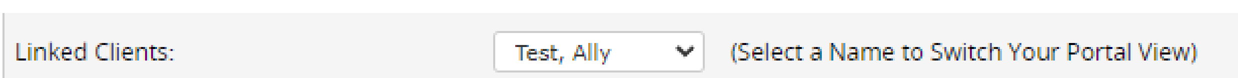
Client Info

View Demographics displays the demographic information on file. You can update demographic information including address, phone, etc. Click save in the upper right hand corner of the screen after making any changes.

View Funding Sources shows current and past insurance. If information shown is not correct, please contact your service provider.

Account Settings allows you to switch between portal accounts if more than one client is registered under your email address.

- Click account settings.
- Click the Linked Clients dropdown.
- Choose the linked client you want to view. The page will refresh, and a dashboard for the new account will appear.



If you have questions or need assistance navigating the portal, please contact:

nkilburg@tanagerplace.org