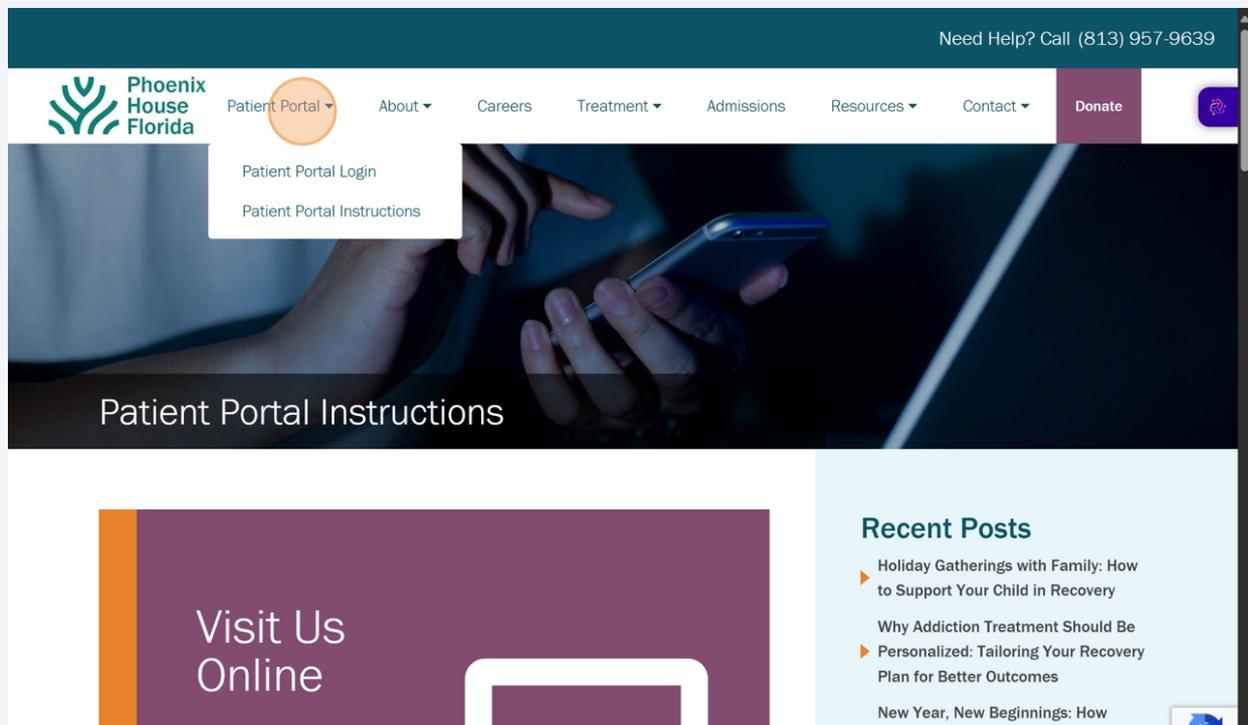


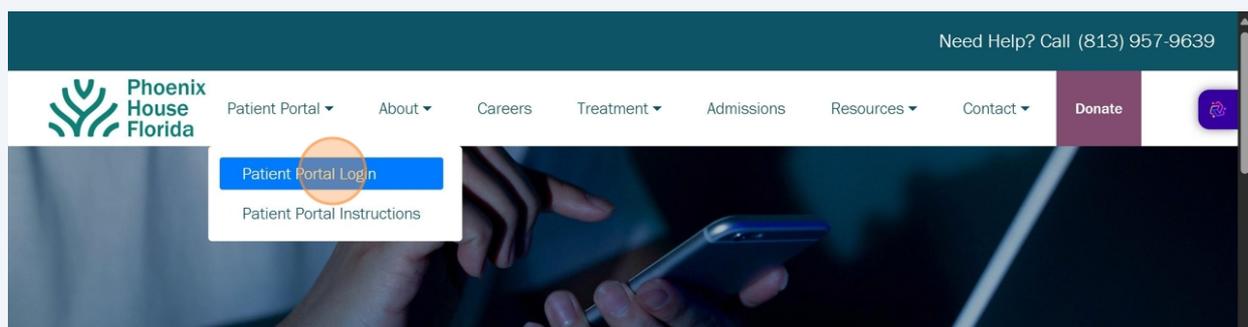
Logging In and Navigating the Patient Portal

1 Navigate to <https://www.phoenixfl.org/>

2 Click "Patient Portal"

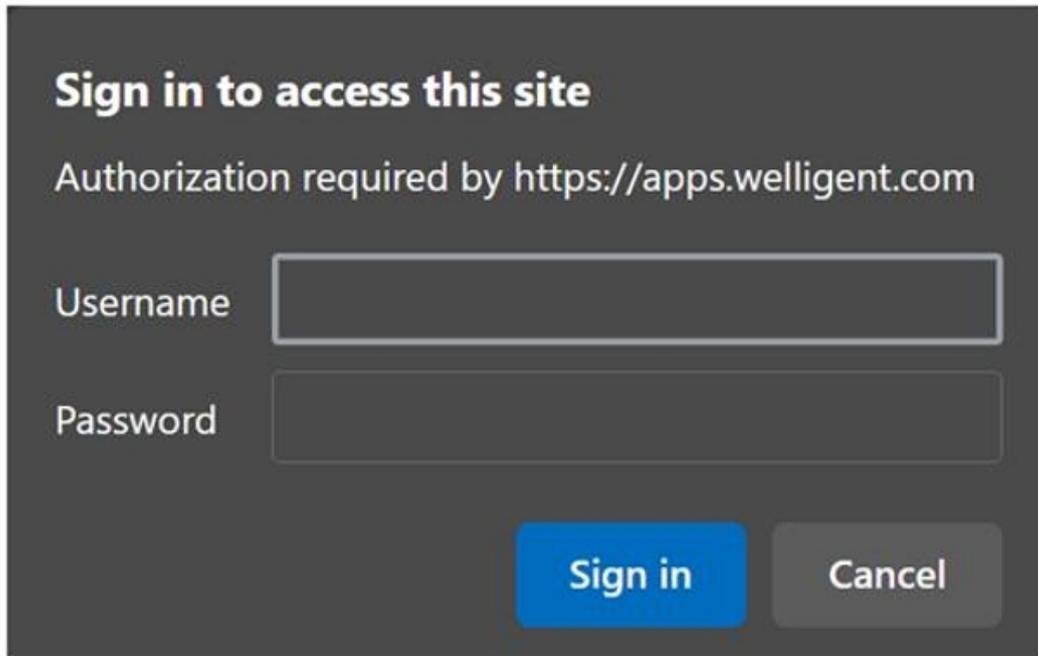


3 Click "Patient Portal Login"



4

Enter your e-mail address in the "Username" field and your temporary password, then click "Sign in"



Sign in to access this site

Authorization required by <https://apps.welligent.com>

Username

Password

The image shows a dark gray dialog box with white text. At the top, it says "Sign in to access this site" in bold. Below that, it says "Authorization required by https://apps.welligent.com". There are two input fields: "Username" and "Password". At the bottom, there are two buttons: "Sign in" (highlighted in blue) and "Cancel" (gray).

5

When you log in for the first time, you will be prompted update your password. The place to do so is highlighted in yellow. Enter your preferred password here and again in the "Confirm Password" field to verify it.

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes) [Sign Out]

Rich Test [Save]

Account Settings

Account First Name: Rich *

Account Last Name: Test *

Linked Clients: Test, Rich (Select a Name to Switch Your Portal View)

Email Address (Will Be the Account Name): matt@testforppfi *

Account Password: [Yellow Highlighted] (Not to exceed 20 characters)

Confirm Password: [Yellow Highlighted] (Not to exceed 20 characters)

Challenge Question: [Dropdown]

Challenge Response: [Text Field]

Challenge Question(2): [Dropdown]

Challenge Response(2): [Text Field]

Turn Off Email Alerts:

Last Login Date: 03-Mar-2025 11:37am

Password Changed On: Never Changed

Date Account Created: 06-Feb-2025 12:27pm

Translate Portal:

6

Click "Save"

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes) [Sign Out]

Rich Test [Save]

Account Settings

Account First Name: Rich *

Account Last Name: Test *

Linked Clients: Test, Rich (Select a Name to Switch Your Portal View)

Email Address (Will Be the Account Name): matt@testforppfi *

Account Password: [Yellow Highlighted] (Not to exceed 20 characters)

Confirm Password: [Yellow Highlighted] (Not to exceed 20 characters)

Challenge Question: [Dropdown]

Challenge Response: [Text Field]

Challenge Question(2): [Dropdown]

Challenge Response(2): [Text Field]

Turn Off Email Alerts:

Last Login Date: 03-Mar-2025 11:37am

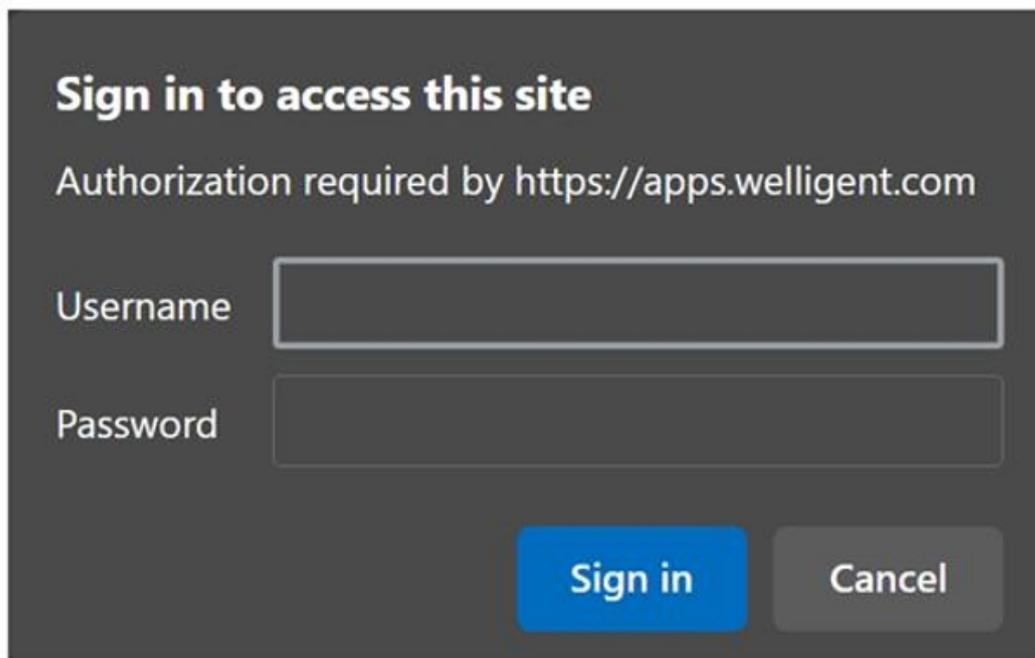
Password Changed On: Never Changed

Date Account Created: 06-Feb-2025 12:27pm

Translate Portal:

7

This screen pop-up screen will appear again. Enter your e-mail address as your username and your password to verify both and to log back into the portal after your password update.



Sign in to access this site

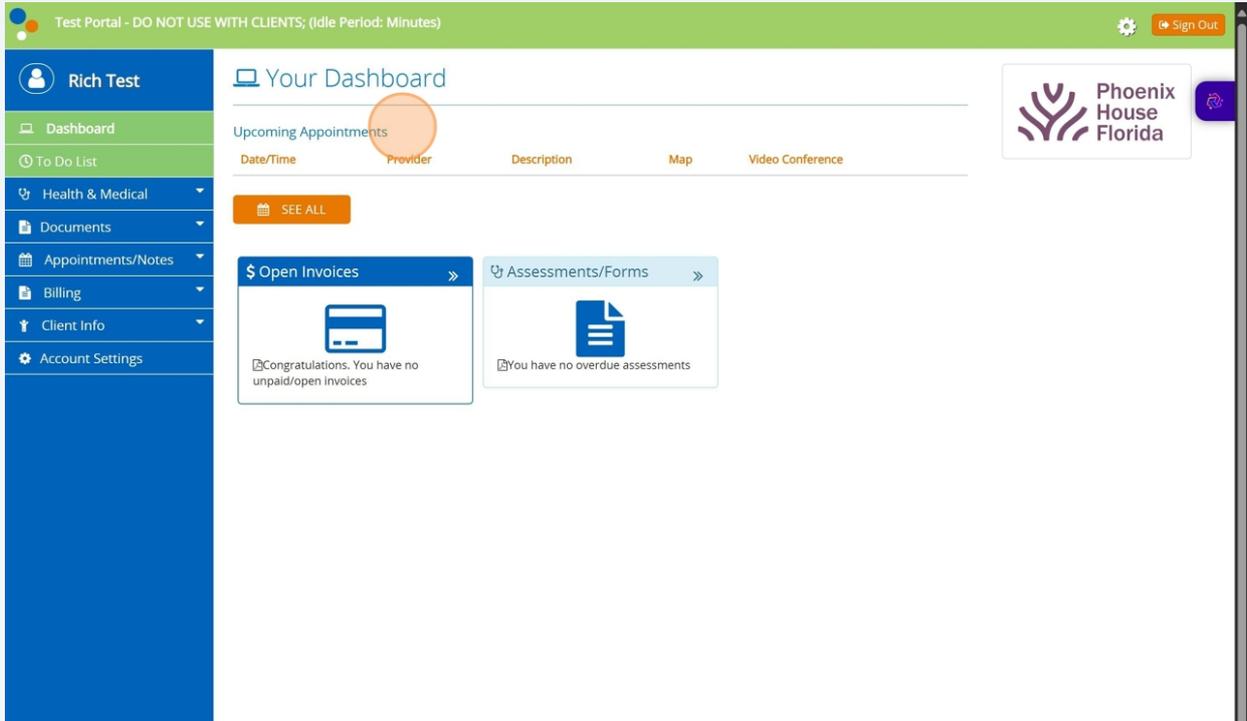
Authorization required by <https://apps.welligent.com>

Username

Password

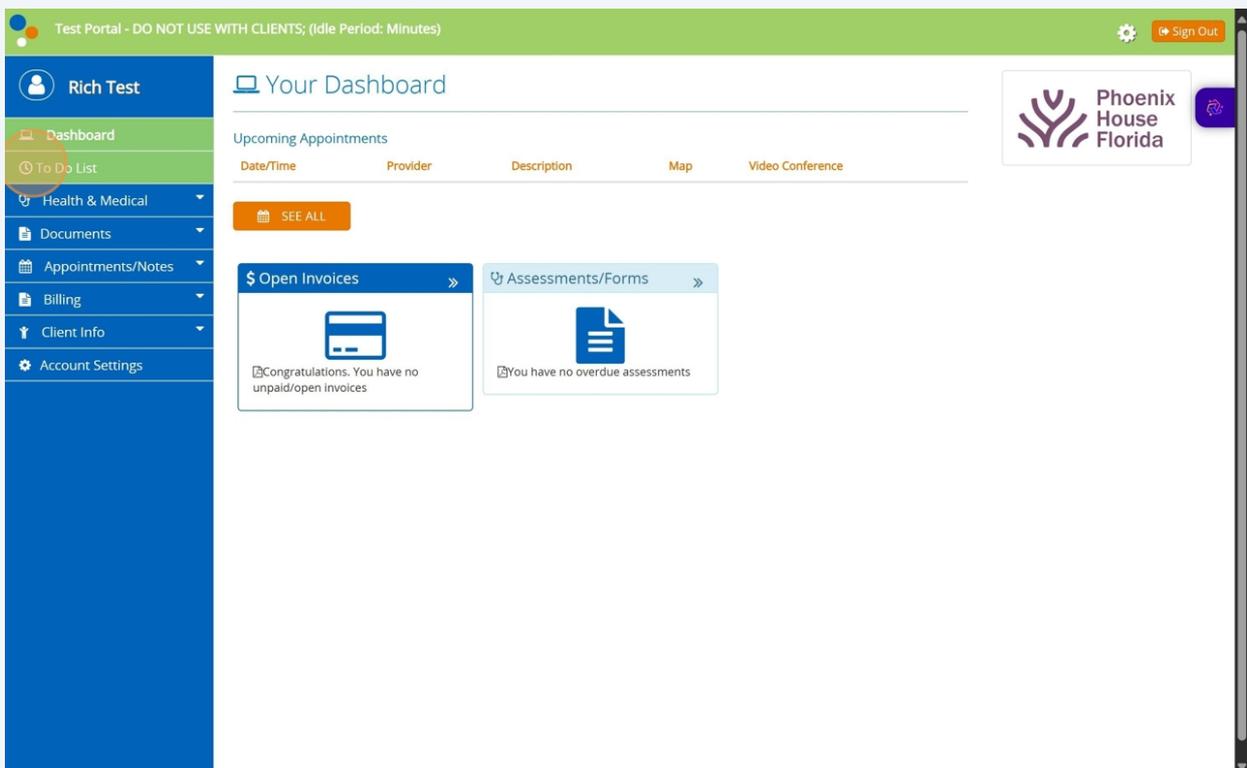
8

Once you have entered your e-mail address and updated password, you will be automatically taken to the dashboard screen. This screen will show your upcoming appointments.



9

To view documents that require your attention, click on the "To Do List" icon on the left side of the screen.



10

To review and/or sign a documents like Intake Documentation, Consents, Releases of Information, Treatment Plans, and more click "Sign" to the left of the document you want to review.

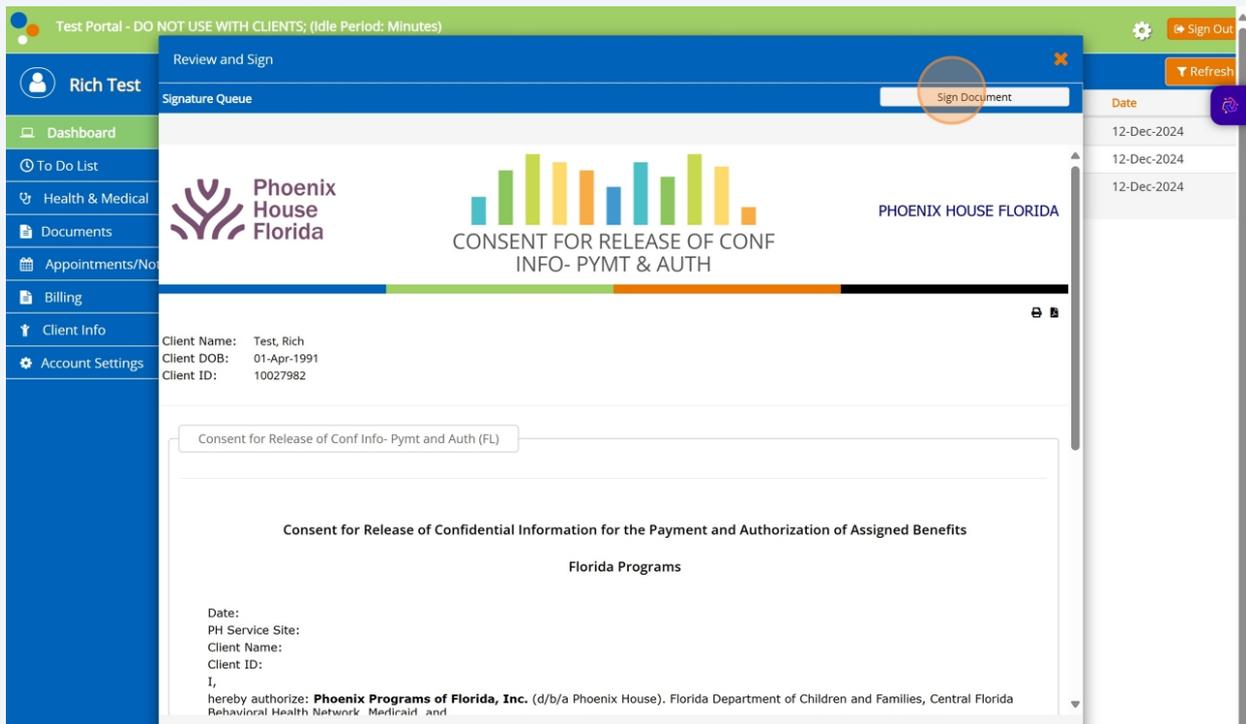
The screenshot shows a web portal interface. At the top, there is a green header bar with the text "Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes)" and a "Sign Out" button. Below the header is a blue navigation bar with a user profile icon and the name "Rich Test". On the left side, there is a vertical menu with options: Dashboard, To Do List, Health & Medical, Documents, Appointments/Notes, Billing, Client Info, and Account Settings. The main content area is titled "Forms To Complete" and contains a table with the following data:

Click to Edit	Action	Document Name	Program	Date
	Sign	Consent for Release of Conf Info- Pymt & Auth(Form)	Example Program	12-Dec-2024
	Sign	Consent for Release of Conf Info- Pymt & Auth(Form)	Example Program	12-Dec-2024
	Sign	Consent for Release of Conf Info- Pymt & Auth(Form)	Example Program	12-Dec-2024

The "Sign" button in the first row of the table is circled in orange. A "Refresh" button is located in the top right corner of the table area.

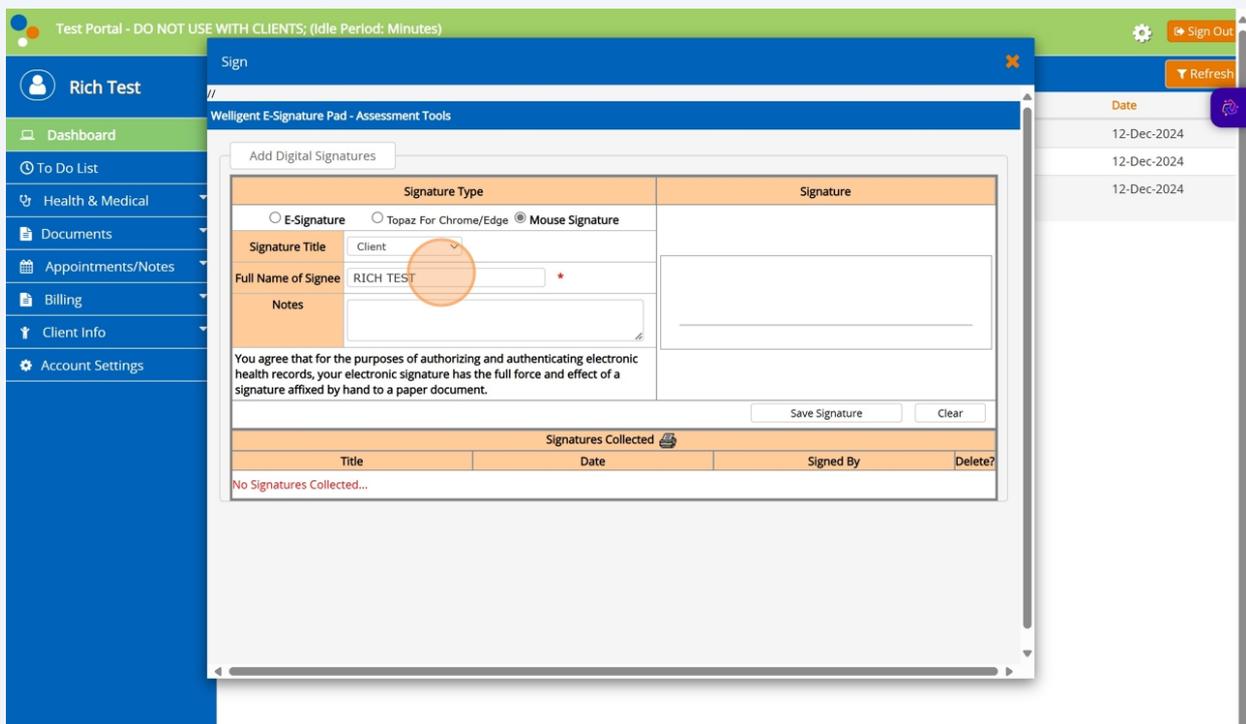
11

When the document appears, you can review it as needed and when you are ready, click "Sign Document" in the upper right corner of the document.



12

A new screen will pop-up. This screen will allow you to sign the document. Make sure our relationship to the client is selected under "Signature Title" and that your name is entered in the "Full Name of Signee" field.



13 Click "Your browser doesn't support signing"

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes)

Rich Test

Dashboard

To Do List

Health & Medical

Documents

Appointments/Notes

Billing

Client Info

Account Settings

Sign

Welligent E-Signature Pad - Assessment Tools

Add Digital Signatures

Signature Type

E-Signature Topaz For Chrome/Edge Mouse Signature

Signature Title: Client

Full Name of Signee: Rich Test *

Notes

You agree that for the purposes of authorizing and authenticating electronic health records, your electronic signature has the full force and effect of a signature affixed by hand to a paper document.

Save Signature Clear

Signatures Collected

Title	Date	Signed By	Delete?
No Signatures Collected...			

12-Dec-2024

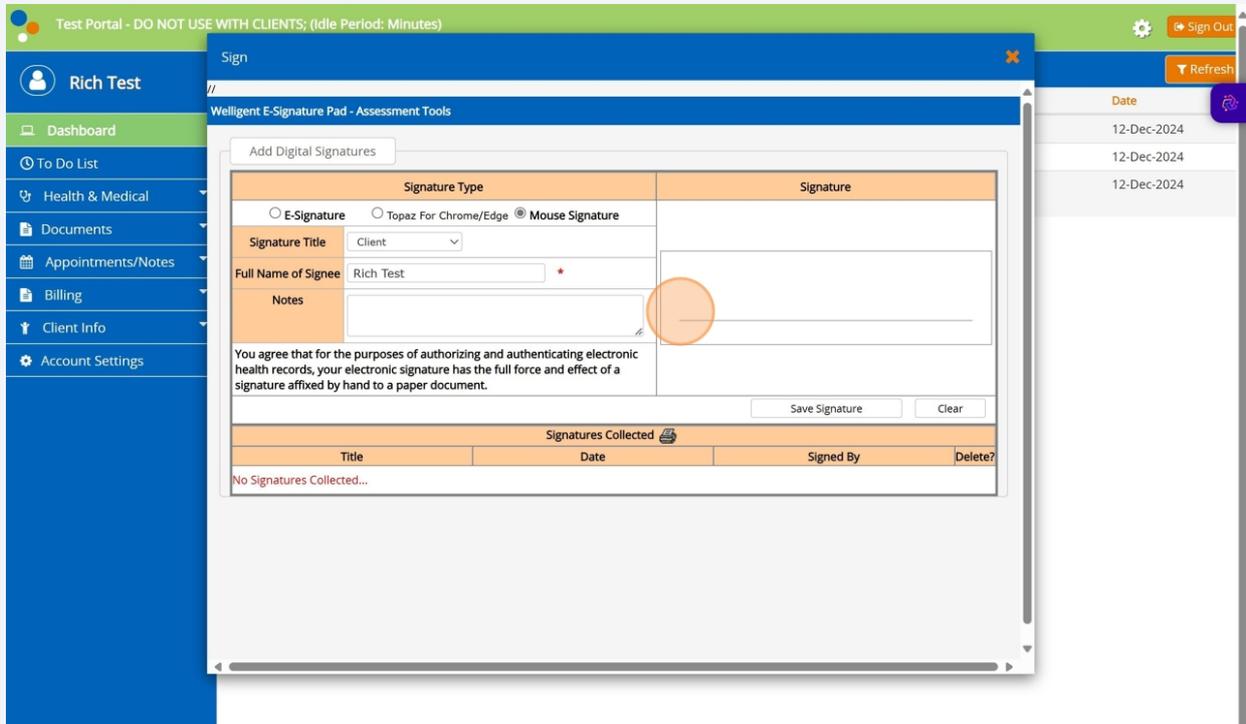
12-Dec-2024

12-Dec-2024

Sign Out Refresh

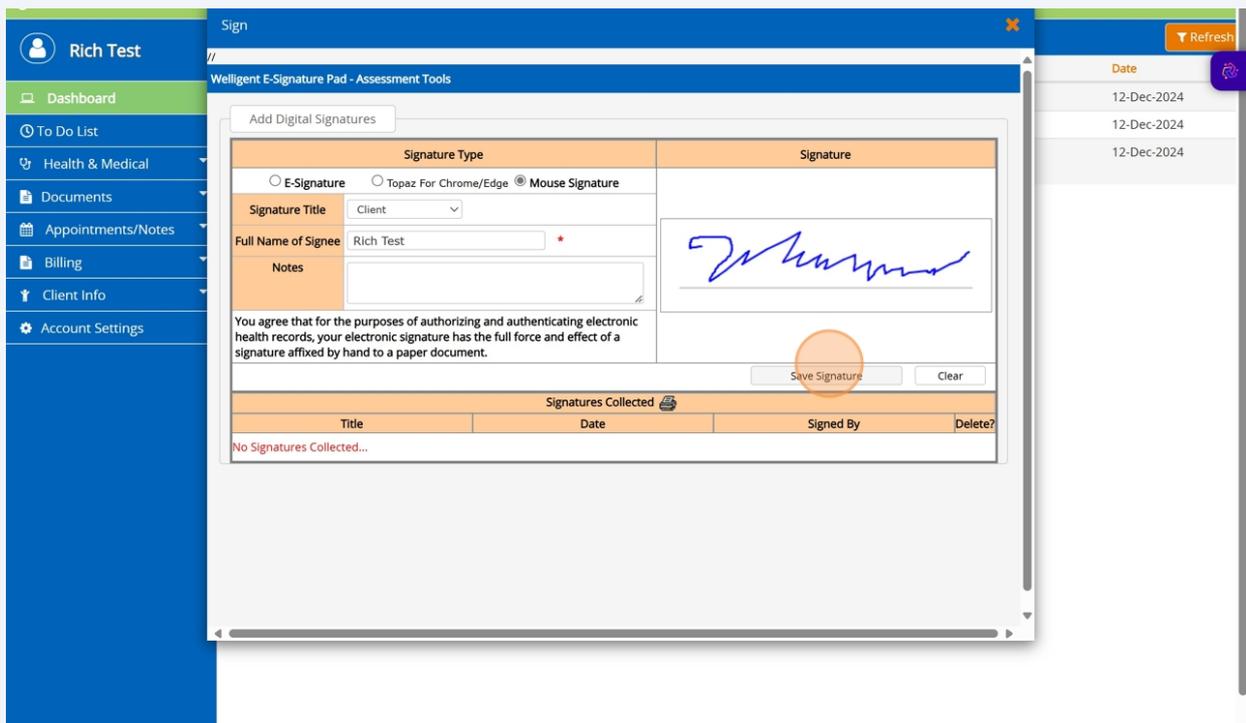
14

Enter your signature in the "Signature" box on the right side of this screen. If you are using a touch screen device, you can use your finger to write your signature. If you are accessing the portal for a computer which has a mouse you can click and hold down the click button and then write your signature with your mouse in this area.



15

When you are finished, click "Save Signature"



16 When you are done, click the orange X to close this screen.

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar includes a user profile for 'Rich Test' and a list of navigation items: Dashboard, To Do List, Health & Medical, Documents, Appointments/Notes, Billing, Client Info, and Account Settings. The main content area is titled 'Sign' and contains a 'Welligent E-Signature Pad - Assessment Tools' window. This window has a title bar with a close button (orange X) and a 'Refresh' button. The main area of the window is titled 'Add Digital Signatures' and contains a form with the following fields and options:

- Signature Type:** Radio buttons for E-Signature, Topaz For Chrome/Edge, and Mouse Signature (selected).
- Signature Title:** A dropdown menu with 'Client' selected.
- Full Name of Signee:** A text input field containing 'RICH TEST'.
- Notes:** A text area for additional information.
- Disclaimer:** A paragraph stating: 'You agree that for the purposes of authorizing and authenticating electronic health records, your electronic signature has the full force and effect of a signature affixed by hand to a paper document.'
- Buttons:** 'Save Signature' and 'Clear' buttons.

Below the form is a table titled 'Signatures Collected' with the following data:

Title	Date	Signed By	Delete?
Client,	March 03, 2025 11:40AM	Rich Test (D)	

17

You can see previously completed documents in the "Documents" area of the portal. You can also view any Files/Attachments share with you by your provider in this area as well.

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes) [Sign Out]

Rich Test [Refresh]

Forms To Complete

Click to Edit	Action	Document Name	Program	Date
✎	Sign	Consent for Release of Conf Info- Pymt & Auth(Form)	Example Program	12-Dec-2024
✎	Sign	Consent for Release of Conf Info- Pymt & Auth(Form)	Example Program	12-Dec-2024
✎	Sign	Consent for Release of Conf Info- Pymt & Auth(Form)	Example Program	12-Dec-2024

Documents

- Completed Documents
- Files/Attachments
- Appointments/Notes
- Billing
- Client Info
- Account Settings

18

To see listings of your past and upcoming appointments click "Appointments/Notes"

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes) [Sign Out]

Rich Test [Refresh]

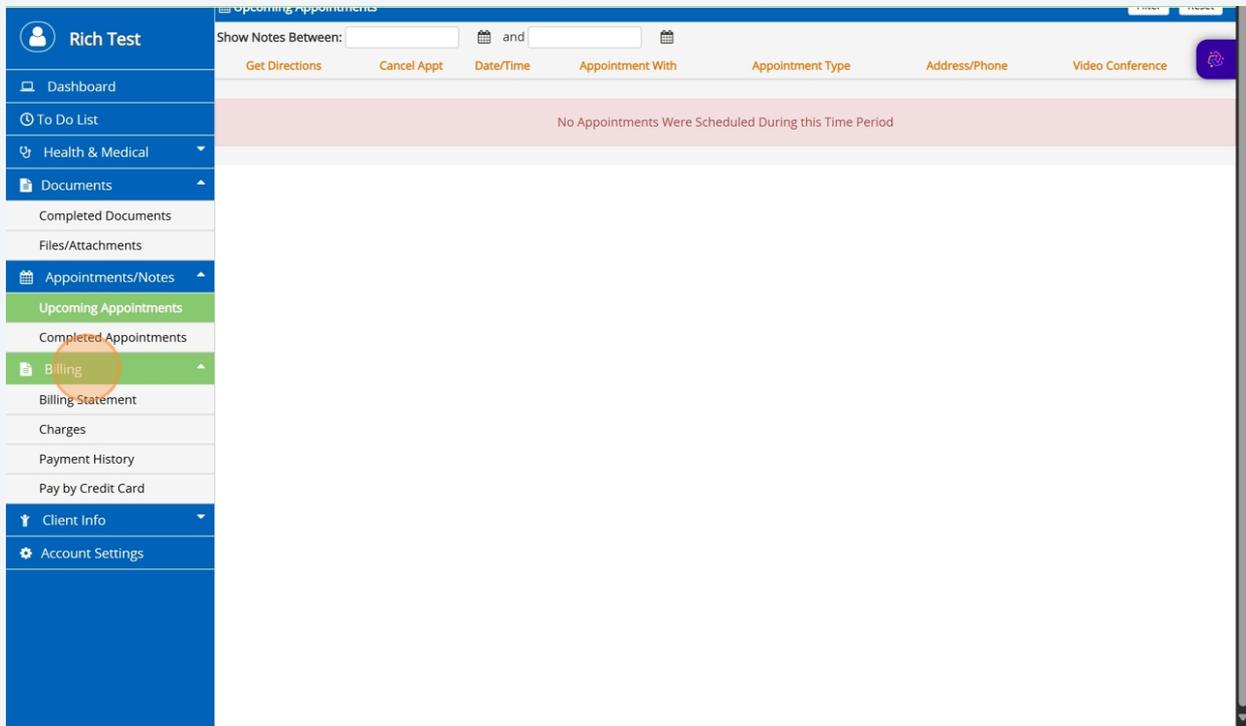
Completed Documents

Click to View	Document Name	Program	Date Completed
A Total of 0 Forms Were Found			

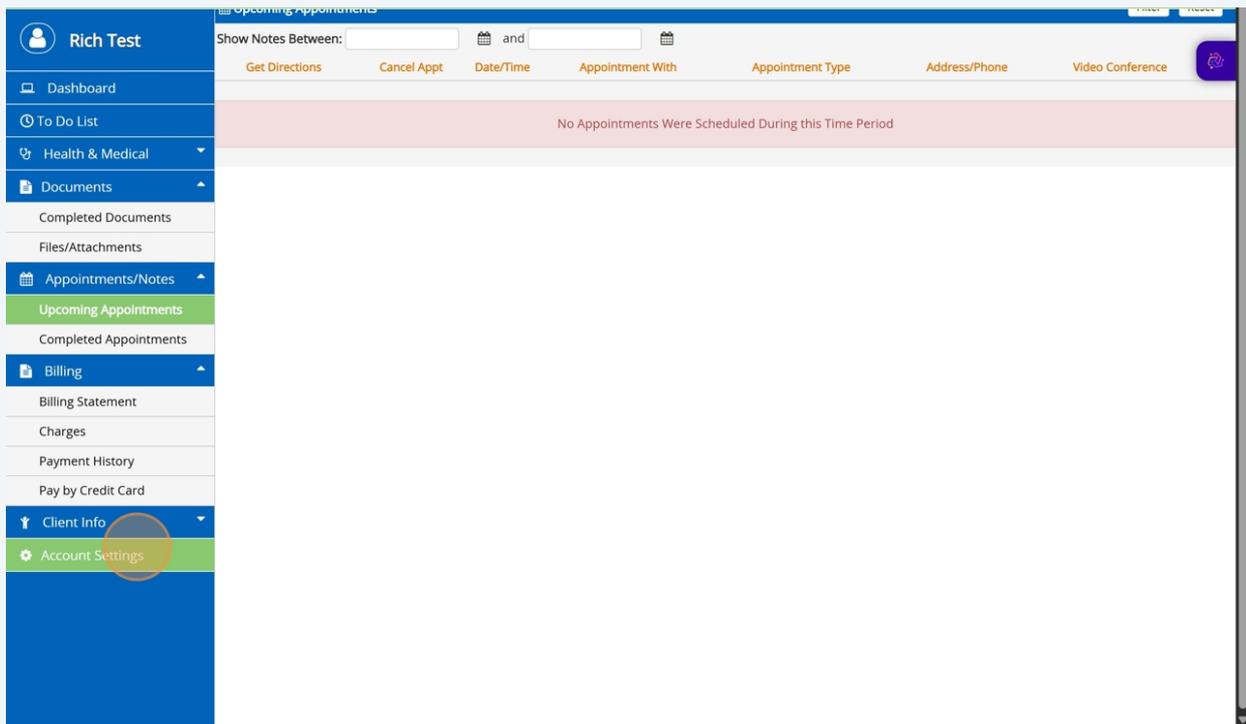
Appointments/Notes

- Upcoming Appointments
- Completed Appointments
- Billing
- Client Info
- Account Settings

19 Click "Billing" to see billing related information and to make payments.

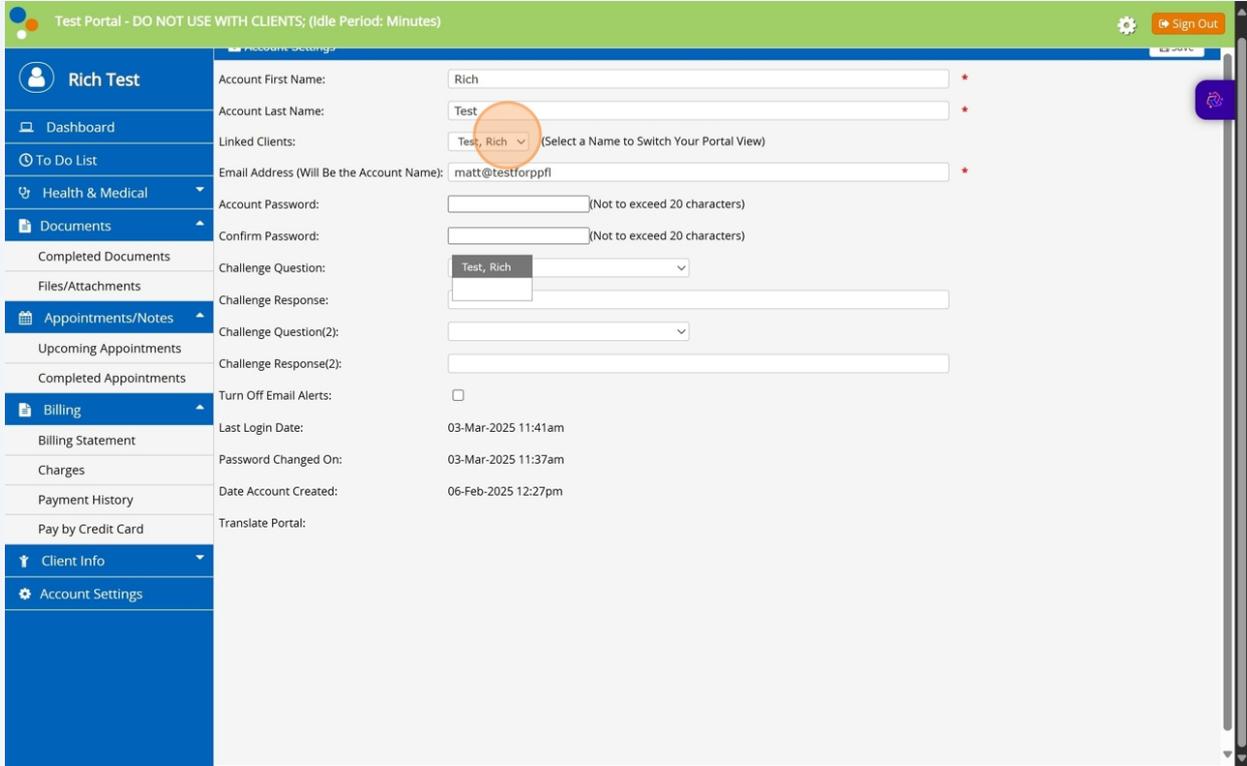


20 To manage your account or switch between linked accounts click "Account Settings"



21

If you have multiple Patient Portal accounts linked to your e-mail address, use the "Linked Accounts" dropdown to navigate between accounts.



22

After selecting the linked account you want to view, click "Save"

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes)

Rich Test

Account Settings

Account First Name: Rich

Account Last Name: Test

Linked Clients: Test, Rich (Select a Name to Switch Your Portal View)

Email Address (Will Be the Account Name): matt@testforppfl

Account Password: (Not to exceed 20 characters)

Confirm Password: (Not to exceed 20 characters)

Challenge Question:

Challenge Response:

Challenge Question(2):

Challenge Response(2):

Turn Off Email Alerts:

Last Login Date: 03-Mar-2025 11:41am

Password Changed On: 03-Mar-2025 11:37am

Date Account Created: 06-Feb-2025 12:27pm

Translate Portal:

Sign Out

Save

23

When you are finished, click "Sign Out" at the top of the screen. This will log you out of the portal and makes sure that no one else you are sharing a device with can access your confidential information.

Test Portal - DO NOT USE WITH CLIENTS; (Idle Period: Minutes)

Rich Test

Account Settings

Account First Name: Rich

Account Last Name: Test

Linked Clients: Test, Rich (Select a Name to Switch Your Portal View)

Email Address (Will Be the Account Name): matt@testforppfl

Account Password: (Not to exceed 20 characters)

Confirm Password: (Not to exceed 20 characters)

Challenge Question:

Challenge Response:

Challenge Question(2):

Challenge Response(2):

Turn Off Email Alerts:

Last Login Date: 03-Mar-2025 11:41am

Password Changed On: 03-Mar-2025 11:37am

Date Account Created: 06-Feb-2025 12:27pm

Translate Portal:

Sign Out

Save