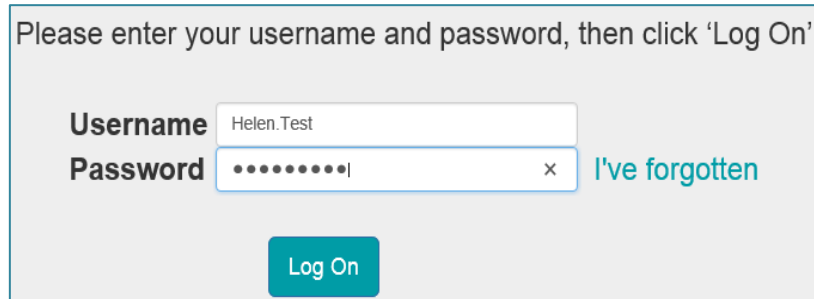


Client Access Portal Guidance Notes

Logging On for the First Time

You will be sent an email with a link to the portal's log in screen as well as your username and password. Click on the link and you will see this screen.



Please enter your username and password, then click 'Log On'

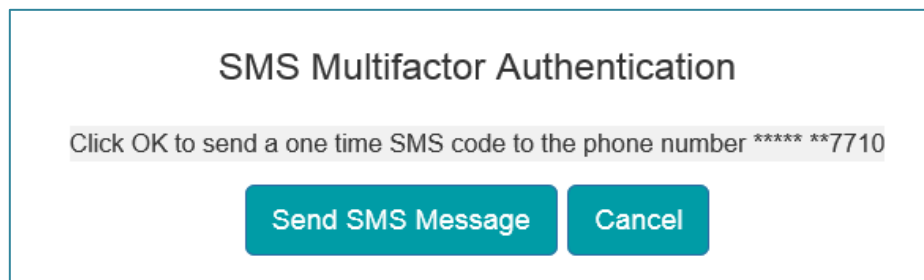
Username Helen.Test

Password| x [I've forgotten](#)

Log On

Two Factor Authentication

Once you have entered your details and clicked the **Log On** button you will get the screen below with the last 4 digits of your mobile number. Click the **Send SMS Message** button.

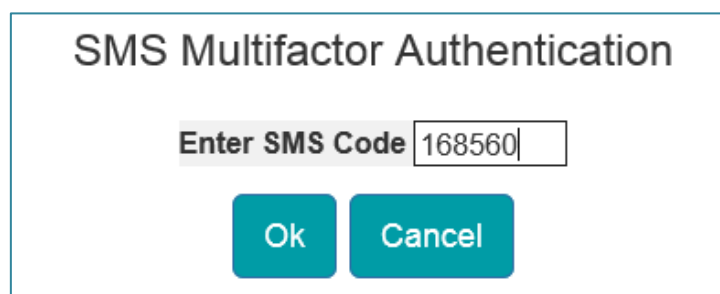


SMS Multifactor Authentication

Click OK to send a one time SMS code to the phone number ***** **7710

Send SMS Message **Cancel**

You will receive a text message on your mobile phone with a 6-digit code. Enter this number in the **Enter SMS Code** field and click **OK**. You will then log into your RF Connect account.

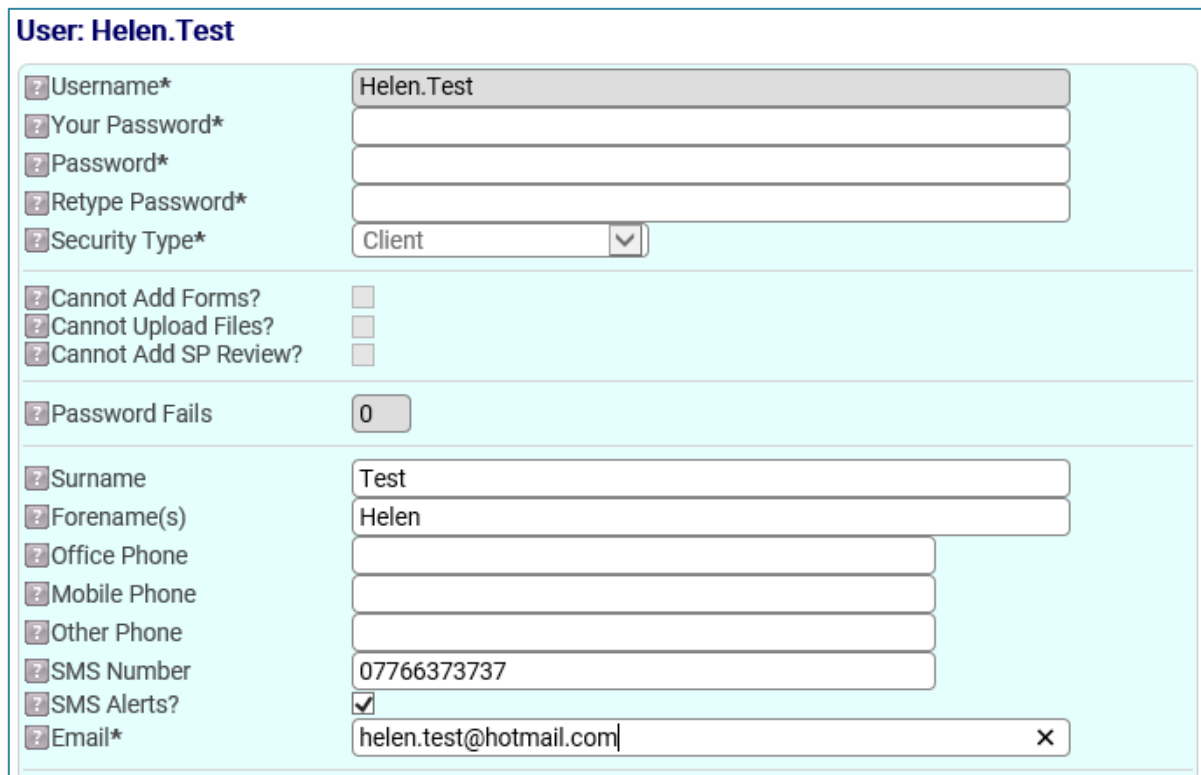


SMS Multifactor Authentication

Enter SMS Code 168560|

Ok **Cancel**

You will then see the following screen inviting you to change your password.



User: Helen.Test

? Username* Helen.Test

? Your Password*

? Password*

? Retype Password*

? Security Type* Client

? Cannot Add Forms?

? Cannot Upload Files?

? Cannot Add SP Review?

? Password Fails 0

? Surname Test

? Forename(s) Helen

? Office Phone

? Mobile Phone

? Other Phone

? SMS Number 07766373737

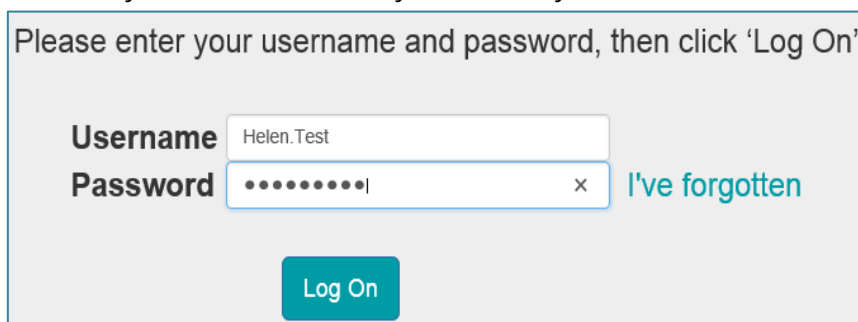
? SMS Alerts?

? Email* helen.test@hotmail.com X

In the **Your Password** field enter the password you were given to log in for the first time. In the following two fields enter your new password. Choose a password that is personal to you and that no one else knows about. Make sure your email address and mobile number are correct. You do not have to complete any of the remaining fields.

Logging in after the first time

The next time you want to log into your account use the Web Address or URL <https://recoveryfocus.cdpssoft.com>
It may be useful to save this to your favorites bar, so you can easily access it in future.



Please enter your username and password, then click 'Log On'

Username Helen.Test

Password X I've forgotten

Log On

Your username should always have an uppercase letter at the beginning of each part of your name and a full stop in between. Both your username and password are always case sensitive. Once you have entered your username and password successfully you receive the two SMS Multifactor Authentication screens (see page 1 repeat the process above).

If you have forgotten your password then please click the 'I've forgotten' link. You will get an email, with a link to the password reset screen, as below.



Reset Password

Username

Password*

Retype Password*

If you try to log on 3 times with the wrong password your account will be locked and you will get a screen with the message below.

Your logon credentials have been locked. An email has been sent to you explaining how to unlock them. If you do not receive the email or are unable to unlock your credentials for any reason, please contact a system administrator using the details below.

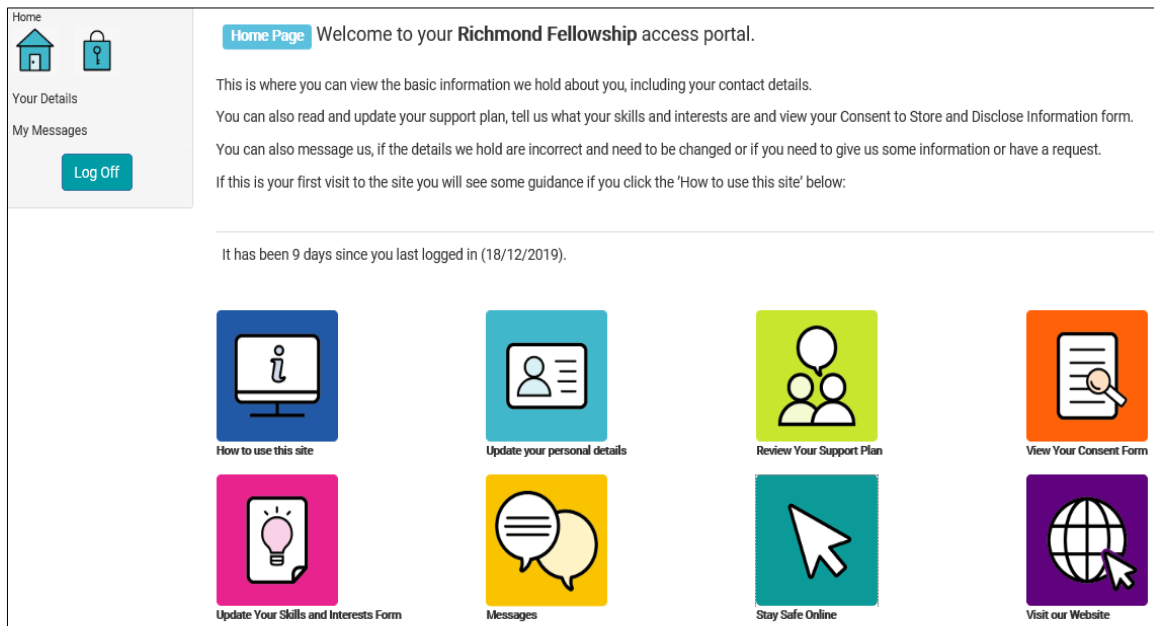
You should then get an email with a link back to the password reset screen.

If you are entering the wrong username you will not get a password email reset so it is important you remember your username.

It is also important that you make sure that your case worker has your latest email address, so that you receive the links back to your password.

Your account will be closed if you have not logged on for 120 days. If you have any problems logging in or do not receive the password reset email please let your case worker know, so they can follow it up.

The Home Screen



The Menu

On the left-hand side of your screen you have the Home and Password Icon and a short menu below.

- Home Icon:** Click this every time you want to return to the Home screen.
- Password Icon:** Click this when you want to reset your password.
- Your Details link:** Click on this to see 3 further links
 - Show All Details: Click on this to see 'About You' (see below) and 'Your Addresses'
 - About You: Click on this to see your basic details (see screen shot below)
 - Your Addresses: Click on this to see any addresses for you recorded on the system
- My Messages:** Click on this to go to your messages (see more guidance on your messages later in the Icons section)

About You [hide](#) [refresh](#) [how to change the information in this section](#)

Forenames	Alan	Surname	Smith
Title	Mr	Also Known As	
Gender	Male	Dob	27/07/1980
Transgender	Yes	Gender Identity	
Ethnicity	White & Black Caribbean		
Religion/Beliefs	Any other religion	Sexual Orientation	Gay Man
Main Phone Number/S	07899 444444	Email Address	alan.smith2222@gmail.com
Registered With GP	Yes	Disability	Yes
Relationship Status	Civil Partnership	N.I. Number	
Cluster Number		Reference Number	

If you click on the 'How to change the information in this section' link it will provide another link to the 'Personal Details Form'. See guidance on how to complete this form in the **Update your Personal Details** section of this document.

The Icons

How to use this site



Click this icon to go to the guidance.

Update your Personal Details



When you click on this icon you open a form that has two sections.

- The first contains **Personal Details** that include contact and diversity information. You can edit any of the details on this section if they are wrong or need updating.
- The second has details of your **Address**. You cannot edit your current address but can add a new one if you have moved.
- When you click the **Save** button you will get the dialogue box below. If you click 'Yes' the form will be saved as completed and an alert will be sent to your case worker. Once these changes are agreed by your case worker they will overwrite the existing details we hold.

Form Status? ✕

⚠ If you click YES the form will be saved as 'COMPLETE' and an alert will be sent to your worker to say you have updated it. If you click NO the form will be saved as 'DRAFT' so you can continue to update it, and your worker will not be notified until you click SAVE and YES.

Review you Support Plan



Once you click on the icon you see 2 links.

1. **Display/Print** If you click on this you see various options to choose from

Display/Print Options

Text Size:

Reviews to Show:

Show Chart:

Show Tasks:

- Medium, Large or Extra-Large text
- Last review, last two or All Reviews
- Bar Chart, Outcome Wheel or No Chart

Once you are happy with your choice, click the **Continue** button.

To see or print your Support Plan click on the PDF button.

2. **Review**

- a. If you click on the last review you will only be able to edit it if you created it yourself. You will not be able to edit any of the previous reviews no matter who created them.
- b. If you click on the Review tab, you can create your own review.
- c. You can view previous notes and actions and can add some new ones.
- d. You can also edit your **Target**, your **Outcome** and **Met Level**.

Target: This is the figure that best represents where you want to be when you have achieved your goal. Your case worker will have the 'Ladder of Change', which will help you understand what the different scores mean.

Outcome: This is the figure that best represents where you feel you are now, whether that is at the beginning of your recovery journey or when reviewing your progress.

Met Level: This can either be **Not Met**, **Progress Made** or **Met**

- e. Within each goal, you can add new **Notes** to describe what has happened since the last review in relation to this goal. If the goal has not been met you can add some new **Actions** by listing the steps you need to take towards achieving your goal.

Support Plan Review

Save Close

New Support Plan Review: WT

General

Review Type*	Client Review
Description	
Review Date*	06/03/2019 17:46
By*	Working Together
Previous Notes	
Notes	
Previous Actions	
Actions	

Support Plan Goal Reviews

Header: LIVING SKILLS

Goal: LS Goal 1

Description/Notes: To learn how to cook

How met?: Start learning to cook 3 simple meals with support of recovery worker

Target	Outcome*	Met Level
8	Prev: 6 8	Prev: Progress Made Met
Previous Notes	Have learned to cook 3 simple meals. I would like to learn to cook more meals that are a bit more complex. Have googled courses in the area and noticed there is a cooking class at the local community class on Tuesday afternoons.	
Notes	lasagne and a roast. However, I sometimes find it hard to motivate myself to do this. So I do think I have achieved my goal, but would like my recovery worker to ask me whether I'm cooking myself meals and encourage me to do so when I'm not.	
Previous Actions	1. Enrol with support of my recovery working on course next week. 2. Attend all 6 weekly sessions.	
Actions		

You will need to sign your support plan digitally once you have completed the review. At the bottom of the page you will see this field. Click on the Signature Capture button and then either by using your finger if you have touch screen, or your mouse if you don't, add your signature and then click Save.

Myself/my representative	No Signature Found
	Signature Capture

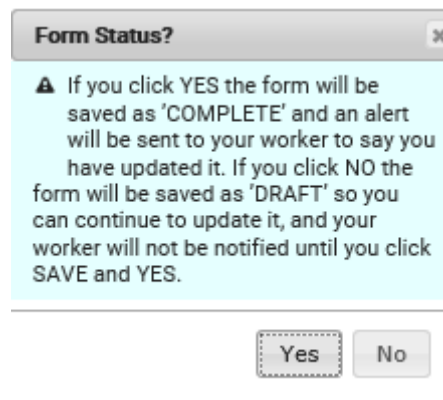
Once you have saved your review, you will again get a dialogue box that asks if you want to save it as complete. If you click 'Yes', your case worker will be alerted to say you have reviewed your Support Plan.

Review Your Consent Form



This is your **Consent to Store and Disclose Information form** and it has two parts.

- The first part is **Consent to Store** Information. It tells you about what sort of information we store about you and asks you for your consent to do this.
- The second part is the **Consent to Disclose** Information. This is also divided into two parts. The first is a list of the professional people involved with your support, like GPs or Care Co-ordinators and their contact details. The second part is family and friends and their contact details. In this bit you get to say whether you want us to check with you each time we are approached by individuals named here. Also, you can say if there is anything you particularly do not want us to disclose to particular individuals named here. For example – you do not want us to tell a family member about your relationships.
- If any of these details are wrong or you want to change something on the form you can either use the messaging feature to let your case worker know or update them yourself on the form.
- You need to make sure that you have signed the form in the Digital Signature field before closing. (see Support Plan Review for guidance) and click the Save button.
- To alert your case worker to any changes you have made select 'Yes' when you get this dialogue box.



Update your Skills & Interest Form



This form has two parts.

- The first is **Interests and Skills** and lists a variety of different activities you could be interested in/or have skills in.
- The second is **Working Together** and asks you some questions about whether you would like to get involved with Richmond Fellowship working together activities and if so, in what way. This could be with your service, within the community or at national level, for example the Working Together Forum.

- By clicking on this icon, you can create a form if you do not already have one. Or if you do have one, you can update your existing details.
- When you click the **Save** button, you will get the dialogue box asking you to click **Yes** if you want to save the form to Completed and alert your case worker that you have made changes.

Messages



This is where you can message your case worker and they can message you back. You can create different threads based on a topic.

This messaging is designed for practical purposes only. These are some of the things you might want to message your case worker about:

- To inform them that some of the information we hold about you is not correct.
- To inform them of some changes to your personal circumstances, for example your benefits.
- To request a support session.
- To let them know that you will not be able to make a meeting.
- To re arrange a meeting
- To let them know you have met one of your goals and would like to arrange a review of your support plan.

It is not an emergency contact system, do not use the messaging in the Portal if you are in crisis and want urgent support. This is because your case worker will only get the message you send when they next log into their account. This could be days or even weeks away if they are on annual leave or are ill. If you are in need of urgent support there is a link to an information sheet at the top of the home page with the contact details of a number of agencies who provide out of hours crisis support.

Messaging an RF Worker

When sending a new message, you need to click on the Select button and you will get a drop down as below. It will show you the members of staff who occupy 3 roles:

- Your overall Case Owner – This should be your primary worker, even if you access more than one of our services.
- Your Assessor – The person who carried out your last assessment for the service.
- You Placement Owner – the person who supports you at a particular service.

In most cases you will only receive support from one of our services, so both the case owner and placement owner (and possibly even the Assessor) will be the same person. If they are the same person it doesn't matter which one you choose to send the message to.

Send message to: Select ▾

Brief Message Description:

Add the details of your message below

- Christina Test, overall case owner
- Mike Cooper Assessor, for Assessment dated: 02/05/2018
- Christina Test Placement Owner 1, for Service: Head Office, Address: 80 Holloway Road

You will not receive confirmation the message has been delivered, but the person you send it to will receive an alert to say that they have a new message.

Stay Safe On-line



Clicking on this icon takes the user to the Digital Unite website with lots of advice and guidance on how to stay safe on-line.

Visit Our Website



Clicking on this icon will take you directly to the home page of our new website. Once there you can find out more about what we do, find the contact details of your own services or see if there are any others in your area that could offer you different types of support. There are also people's stories and the contact details of different urgent out of hour support services, like the Samaritans, Saneline, Alcoholics Anonymous, Gamcare and Refuge amongst others. There is also a link to The Big White Wall, an on-line platform where you can get additional help and support.

Forms and the way they work

The forms referred to here are the **Personal Details form** and the **Skills and Interests form**.

There are three different statuses to each form; Draft, Completed and Approved.

- When you update any of these forms, you are given the option to save it to **Complete** if you are happy with it or **Draft** if not. If you save it to complete an alert will be sent to your case worker.

- Your case worker will have a look at your updated version of the form and will most likely contact you to talk through the changes you have made and then if happy will set the status of the form to **Approved**. This will then become the official version of the form, or if it is the Personal Details form and you have made changes to your personal information, it will overwrite what is already on the system.