

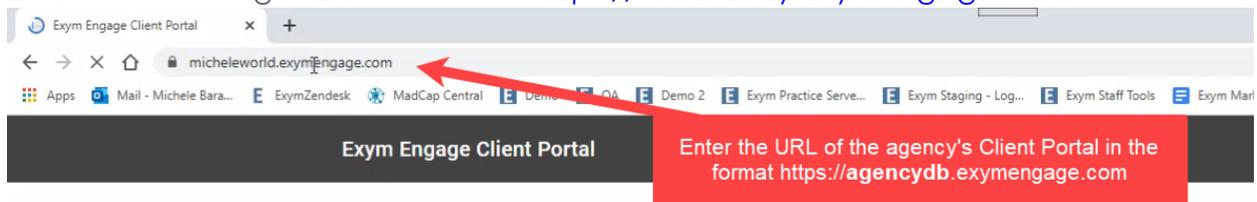


Engage: Instructions for Using the Client Portal

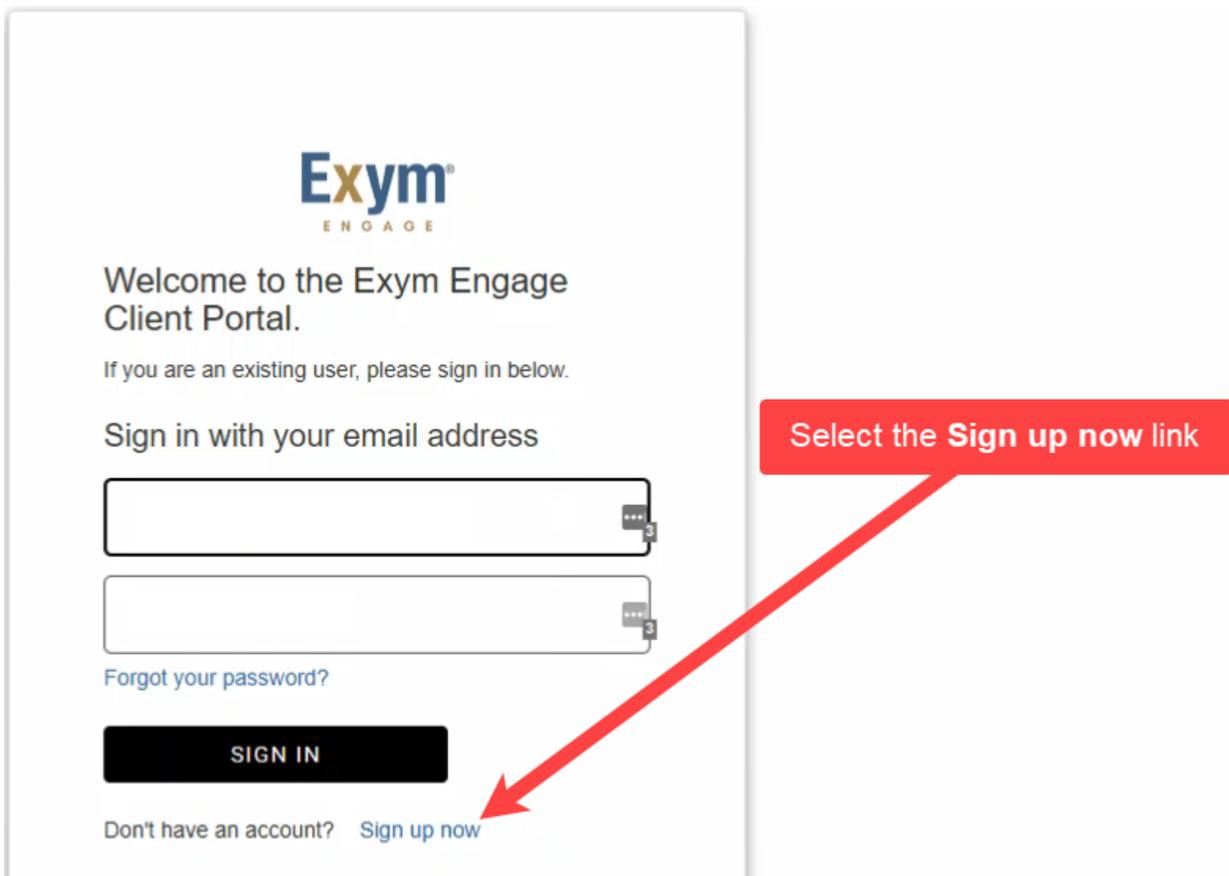
Clients and their contacts must create an account in the Client Portal before they can sign forms electronically.

To create a Client Portal account:

1. Enter the following URL in a browser: <https://childfamily.exymengage.com>



2. Select the **Sign up now** link



3. Enter the email address you gave to the client's provider, and then select the **SEND VERIFICATION CODE** button.

The screenshot shows a mobile application interface for Exym Engage. At the top left, there is a back arrow and the word 'CANCEL'. The Exym Engage logo is centered at the top. Below the logo, the text 'Please provide the following details.' is displayed. There is an email input field containing the text 'tyrone.22a50428@nicoric.com'. Below the email field is a dark button with the text 'SEND VERIFICATION CODE'. Underneath this button are two empty input fields. At the bottom of the screen is a grey button with the text 'CREATE'.

Enter the email address, and then select the **SEND VERIFICATION CODE** button

Check email for a code to verify the email account. If code is not find within the inbox, check the junk email box.

4. Enter the code received via email, and then select the **VERIFY CODE** button

← CANCEL

Exym
ENGAGE

Please provide the following details.

Verification code has been sent to your inbox. Please copy it to the input box below.

tyrone.22a50428@nicoric.com

773800

VERIFY CODE SEND NEW CODE

CREATE

Enter the verification code received via email, and then select the **VERIFY CODE** button

5. Enter a password and verify it by entering it again in the second password field

6. Select the **CREATE** button

← CANCEL

Exym
ENGAGE

Please provide the following details.

E-mail address verified. You can now continue.

tyrone.22a50428@nicoric.com

CHANGE E-MAIL

CREATE

Enter a password, verify it by entering it in the second password field, and then select the **CREATE** button

7. Select the **SEND VERIFICATION CODE** button

← CANCEL

Exym
ENGAGE

Please provide the following details.

Verification is necessary. Please click Send button.

Email Address

t*****@nicoric.com

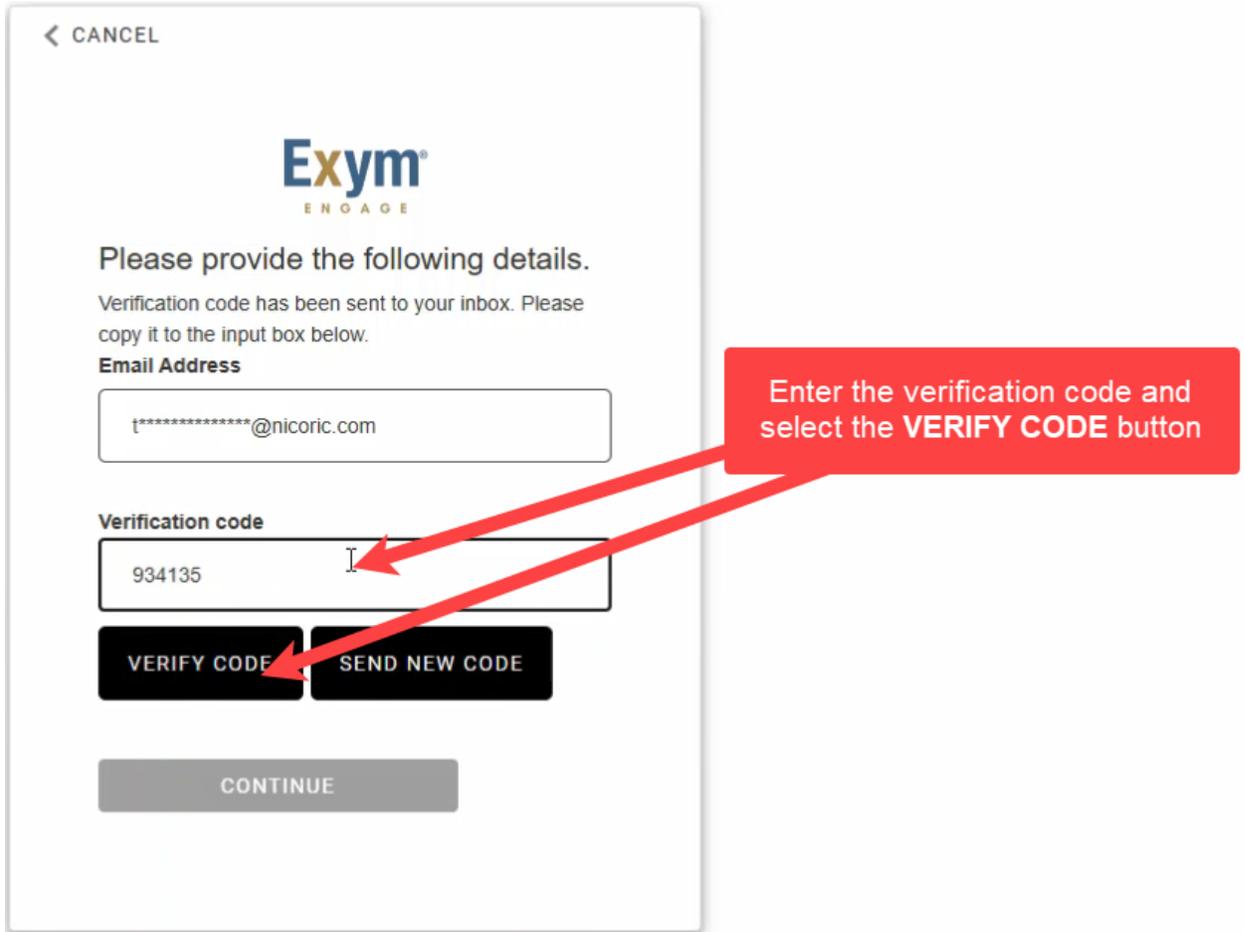
SEND VERIFICATION CODE

CONTINUE

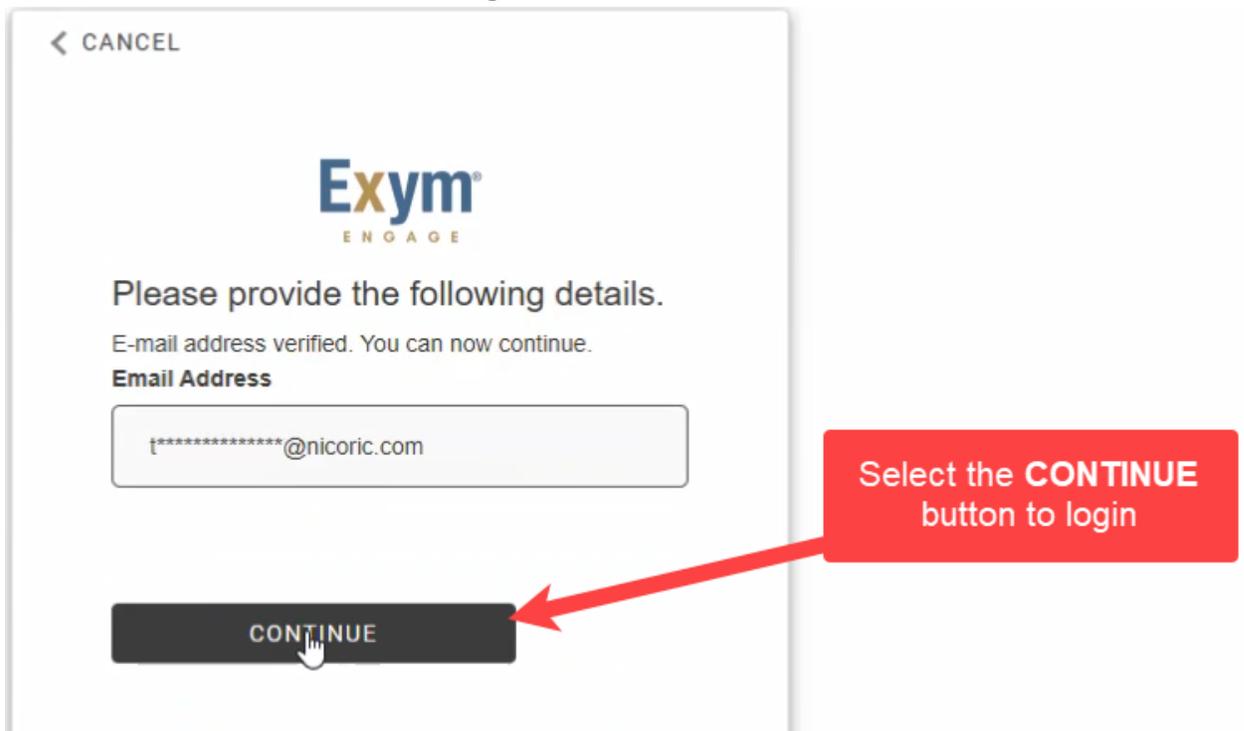
Select the **SEND VERIFICATION CODE** button

Check email for a code

8. Enter the verification code in the Verification code field< and then select the **VERIFY CODE** button



9. Select the **CONTINUE** button to log in

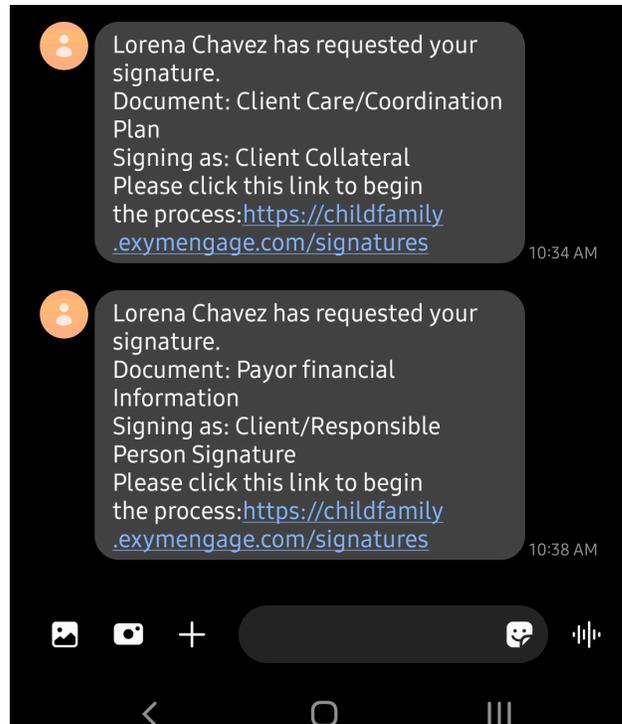


To log into the Client Portal:

1. Enter the the following URL in a browser: <https://childfamily.exymengage.com>
2. Enter the email address and password
3. Select the **SEND VERIFICATION CODE** button. Check email for a verification code.
4. Enter the verification code in the Verification code field and then select the **VERIFY CODE** button
5. Select the **CONTINUE** button to login

To electronically sign documents:

1. Click on the link received via email or text message, and you will be taken directly to the portal and the document for electronic signature.



2. Log into the portal and you will see a Signature request. If there is more than one document to sign, click on one to proceed.

☰ Exym Engage Client Portal
👤

Client: Test, Rozelle's

Signature Requests

Select the document you would like to review by clicking on its row.

Document	Requester
Payor financial Information	Lorena Chavez
Client Care/Coordination Plan	Lorena Chavez

< >
 1 - 2 of 2
 Rows per page: 10 ▼

3. On the next screen, click "proceed to sign".

☰ Exym Engage Client Portal
👤

Client: Test, Rozelle's

Signature Request

Lorena Chavez has requested your signature on this document as: Client/Responsible Person Signature. Please review before proceeding to sign.

You will be able to download a copy of this document once all parties have signed.

PROCEED TO SIGN

BACK TO LIST

4. In the blank area on the screen, enter your signature, and click the "sign" button when complete.

Note: If you are using touch screen device, tablet, or phone, you can sign using your finger or a stylus pen. If you are using a desktop computer or laptop, sign using your mouse.

☰ Exym Engage Client Portal 

Client: Test, Rozelle's

Signature Request

Lorena Chavez has requested your signature on this document as: Client/Responsible Person Signature. Please enter it in the area below.



By signing your name electronically, you are agreeing that your electronic signature is the legal equivalent of your manual signature.

5. You will see a confirmation once your signature has been added to the document. Your provider will be notified that you signed the document.

