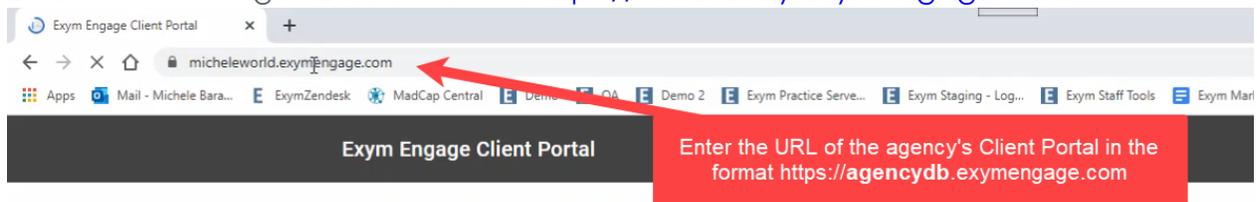**Exym**®

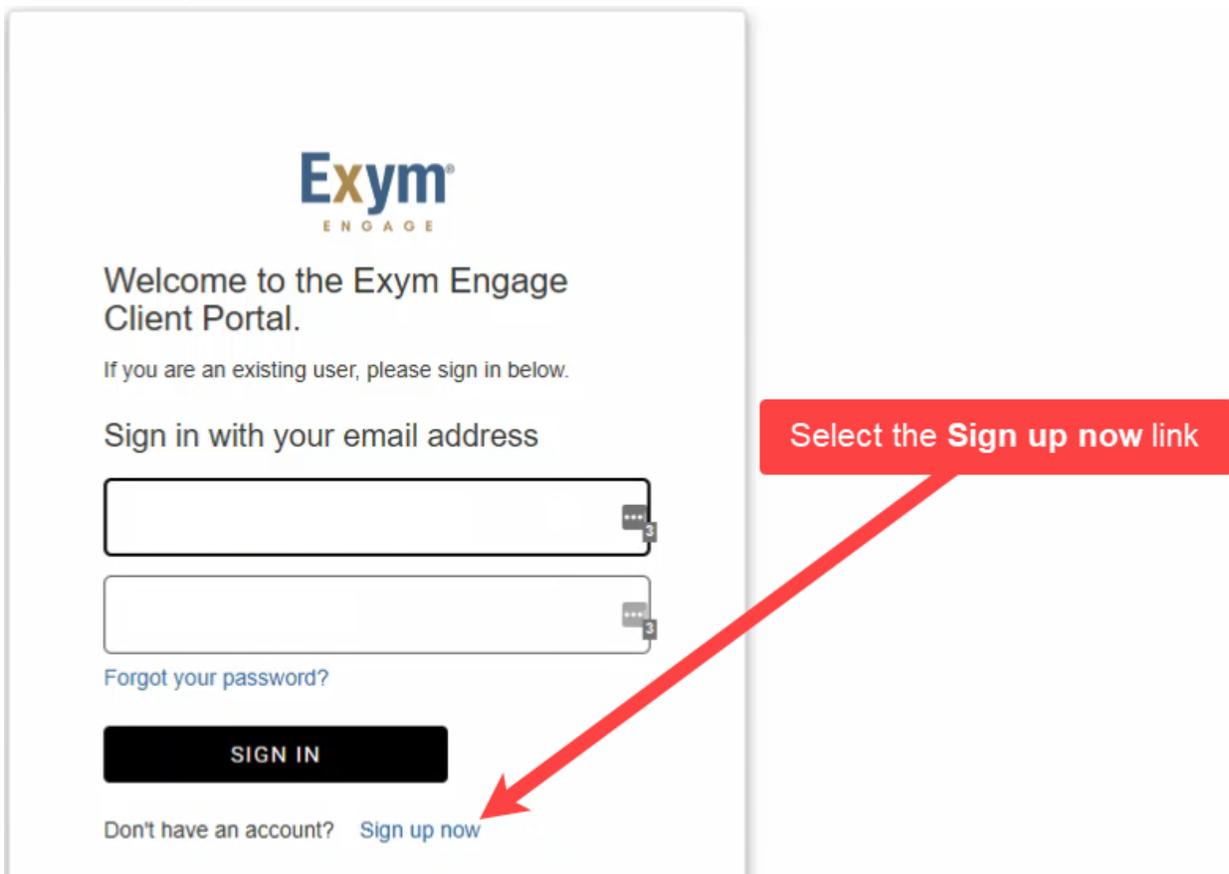# Engage: Instructions for Using the Client Portal

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.

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

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

6. Select the **CREATE** button

Enter a password, verify it by entering it in the second password field, and then select the **CREATE** button
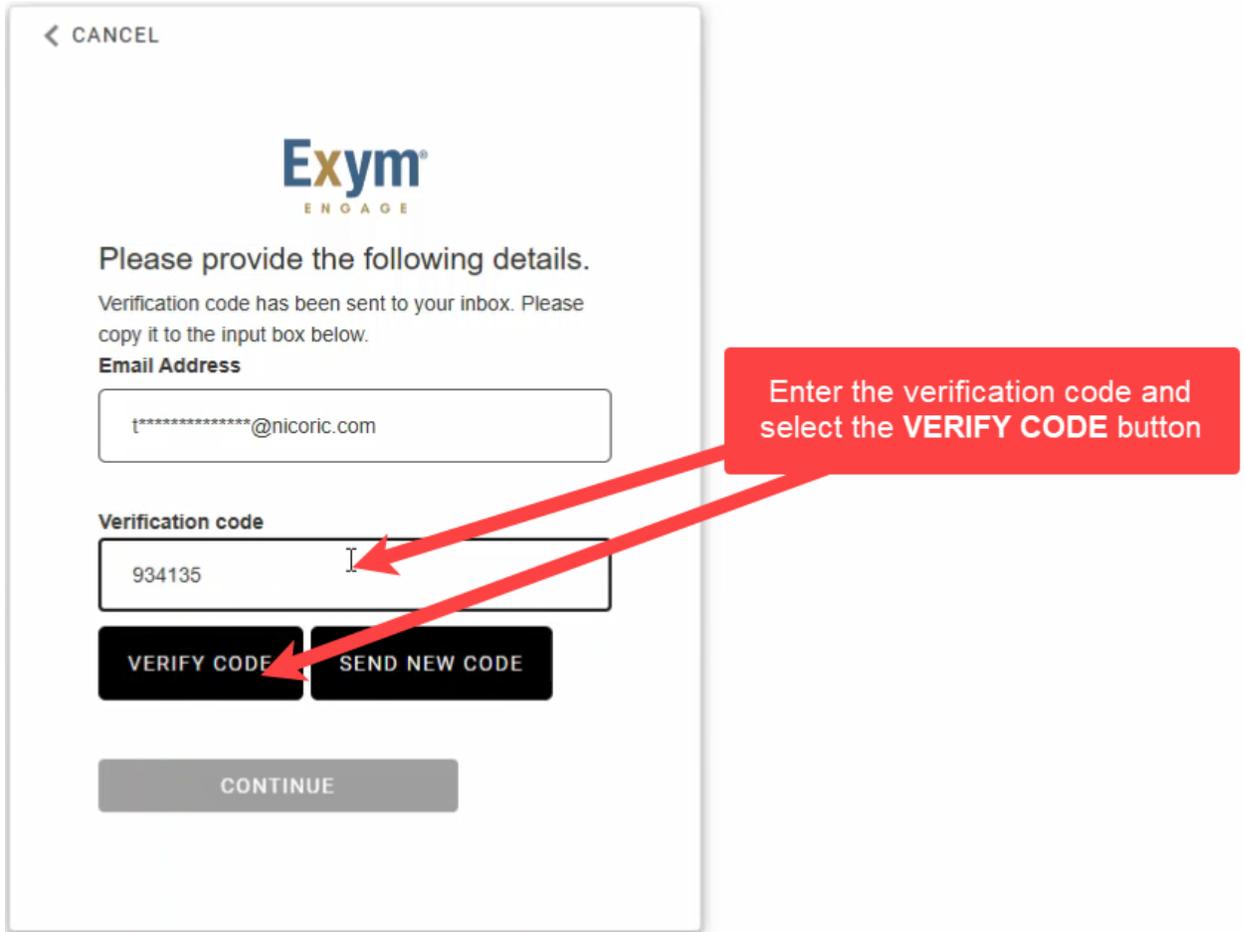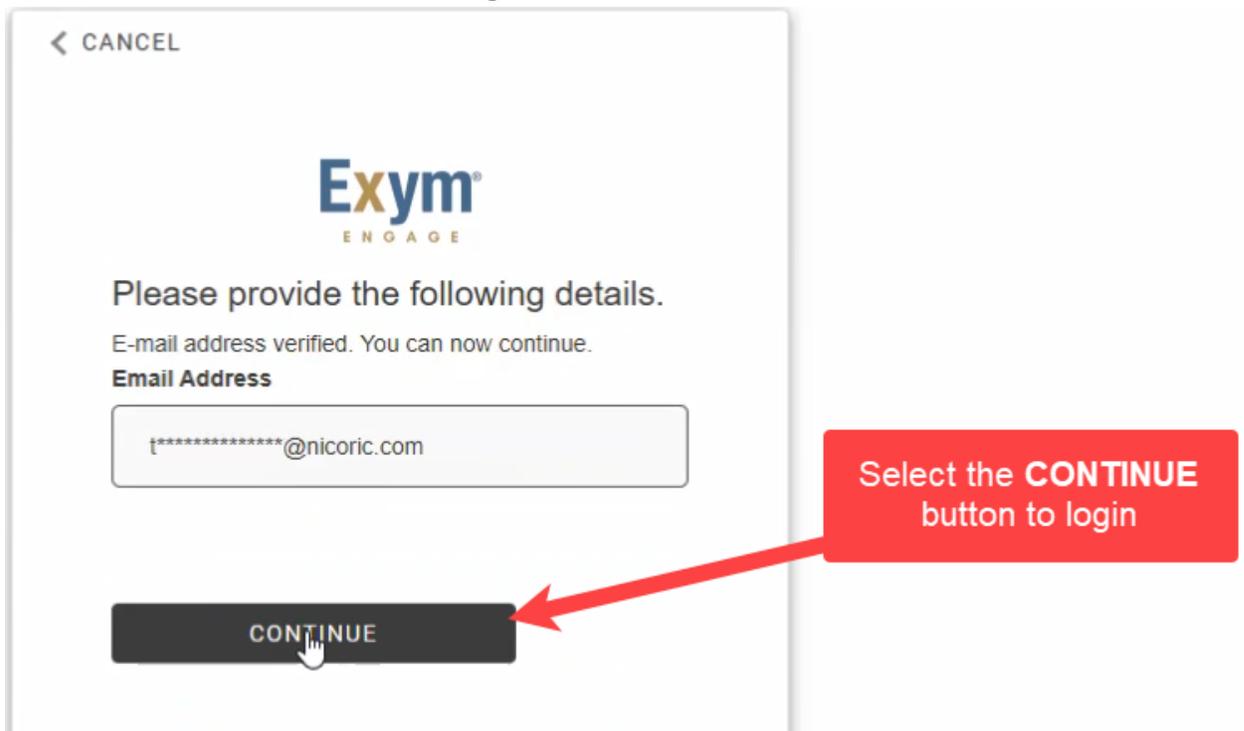
7. Select the **SEND VERIFICATION CODE** button

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

CANCEL

Exym
ENGAGE

Please provide the following details.

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

Email Address

t*************@nicoric.com

Verification code

934135

Enter the verification code and select the **VERIFY CODE** button

VERIFY CODE   SEND NEW CODE

CONTINUE

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

CANCEL

Exym
ENGAGE

Please provide the following details.

E-mail address verified. You can now continue.

Email Address

t*************@nicoric.com

Select the **CONTINUE** button to login

CONTINUE

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
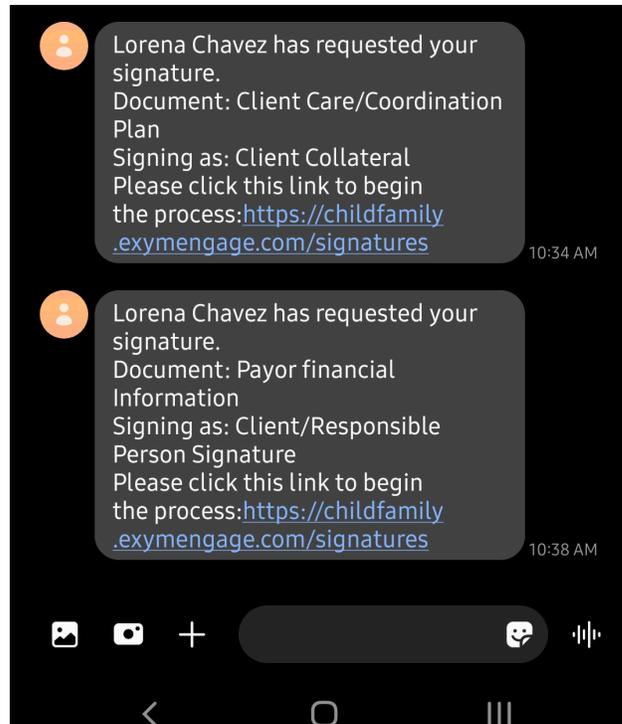5. Select the **CONTINUE** button to login

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.

Search

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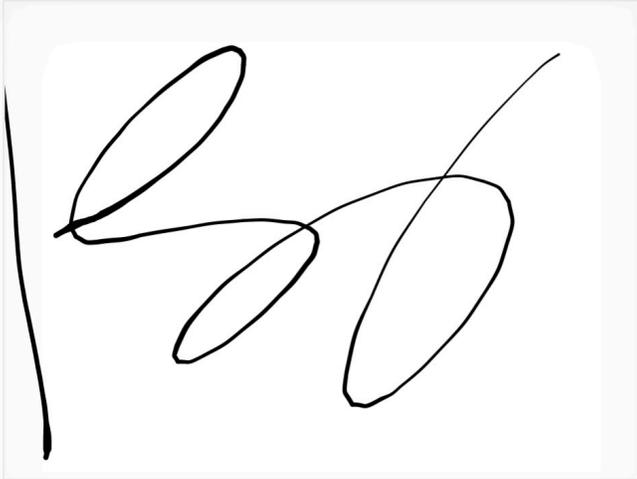
Note: If you are using touch screen device, tablet, or phone, you can sign using your finger or a stylus pen. If you are using a desktop computer or laptop, sign using your mouse.

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.