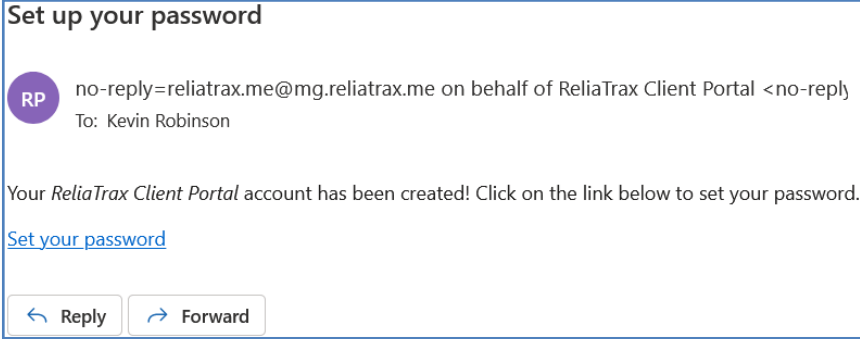


Client Instructions for ReliaTrax Portal

The ReliaTrax client portal lets clients see upcoming appointments, make payments, and complete paperwork online. Please talk with your counselor to verify that we have your correct e-mail address and we can turn on your portal account.

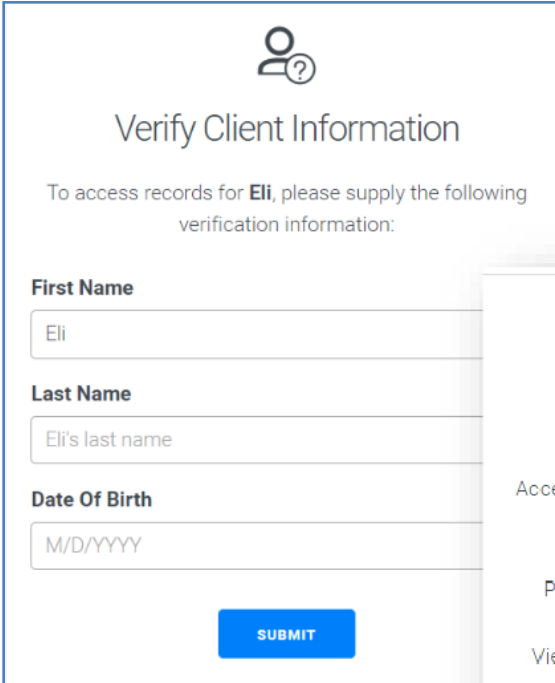
1. SETTING UP YOUR ACCOUNT

Once activated, you will receive an e-mail from “ReliaTrax Client Portal” titled “Set up your password”:



The screenshot shows an email interface. At the top, it says "Set up your password". Below that is a purple circular icon with "RP" and the text "no-reply=reliastrax.me@mg.reliastrax.me on behalf of ReliaTrax Client Portal <no-reply> To: Kevin Robinson". The main body of the email says "Your ReliaTrax Client Portal account has been created! Click on the link below to set your password." followed by a blue hyperlink "Set your password". At the bottom, there are two buttons: "Reply" with a left arrow and "Forward" with a right arrow.

You will be asked to confirm some personal information like your name and date of birth.



The screenshot shows a web form titled "Verify Client Information" with a person icon and a question mark. Below the title, it says "To access records for Eli, please supply the following verification information:". There are three input fields: "First Name" with the value "Eli", "Last Name" with the value "Eli's last name", and "Date Of Birth" with the placeholder "M/D/YYYY". A blue "SUBMIT" button is at the bottom. On the right side, there are partially visible labels: "Acces", "P", and "Vie".

Please make sure you're entering your information correctly; if you make too many mistakes, the system will lock you out for security purposes.

If you have not received your welcome e-mail (and you have looked in your spam folder), ask your counselor to double-check your e-mail address and we can send you a new welcome e-mail.


2. LOGGING IN

Once you have verified your account, you will be able to log in any time at this website:

<https://bts.reliatrax.net/ClientPortal>





3. COMPLETING PAPERWORK

When you first log in, you may see some outstanding tasks – these are documents that have been assigned to you by your counselor. This may include intake paperwork like a release of information, or a screening tool such as the PHQ-9. To begin filling out your paperwork, just click the link - it is best to start with the “Client Profile Forms” document.



Tasks

You have outstanding tasks:

-  [Client Profile Forms](#)
-  [Marketing, photo, & social media release](#)
-  [PORTAL - Treatment Plan](#)
-  [PORTAL - Intake Packet DUI-DUI 4+](#)

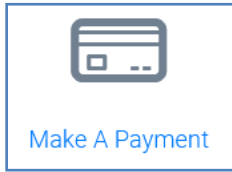
Please fill out as much information as possible. If you don't know the answer to a question, you can leave it blank and follow up with your counselor later.

Emergency Contact		
First Name	Middle Initial	Last Name
<input type="text" value="Jane"/>	<input type="text"/>	<input type="text" value="Doe"/>
Relationship to Client	Phone Number	Type
<input type="text" value="Spouse"/>	<input type="text" value="111-111-1111"/>	<input type="text" value="Cell"/>

Some of the boxes will require you to type in information, and others will show you a menu to choose from a variety of options. In this case, clicking the “Relationship to Client” box will open up a menu.

4. MAKING A PAYMENT

From the main page, click the “Make a Payment” button:



At the top of the next page, you will see your overall balance. Next, there will be a breakdown of various treatments you are enrolled in and the balance for each one:

Code	Treatment	Balance	Amount To Pay
1	Miscellaneous Payments Account	you owe \$197.00	
1227	Outpatient Individual Session (60 min)	you owe \$63.00	<input type="text"/>
1242	ICCS DBT group (\$/V) 120 min	you owe \$49.72	<input type="text"/>
0071	Individual Therapy (60 min)	you owe \$150.00	<input type="text"/>

Under the “Amount to Pay” column, enter the amount you would like to pay towards each of the treatments. Note that you cannot pay for your overall balance, you must choose from the treatments listed. To pay the balances in the above example, enter \$63.00 in the first box, \$49.72 in the second box, and so on.

Scroll to the bottom to see your total and click “Next.” You will be prompted to enter your card info:

Card Information

Name:

Card Information:

Save card info

Optional: You can check the “Save card info” box to save your card number so you won’t need to type it in each time you make a payment.

After you click “Pay Now,” you will see a green message bar that tells you the payment was successful.

5. REVIEWING BALANCES AND PAST PAYMENTS

Click the “Billing History” button. This will show you all treatments you are enrolled in and their individual balances. You will see your overall balance at the top and a list of recent card payments at the bottom. Note that the recent payments list will *not* show payments that you made in person.

6. UPCOMING APPOINTMENTS

Click the “Appointments” page to see your upcoming group dates/times for the next few weeks. You will only see individual appointments if your counselor has scheduled them in the ReliaTrax system.

7. OFFICE LOCATIONS

Click the “Locations” button to for a list of BTS offices. This information is also available on the BTS website at www.btxs.org.

8. FREQUENTLY ASKED QUESTIONS

Q: What do I do if I haven't received my welcome e-mail?

A: First, check your email spam or junk folder. You might also try searching for the word “ReliaTrax.” If you cannot find the e-mail, then ask your counselor to verify that they have your e-mail address entered correctly and they can send you a new welcome e-mail.

Q: Does the portal work with a phone or tablet?

A: Yes, the mobile version of the portal has the same functionality as you would see if you logged in with a computer.

Q: What is the best web browser to use?

A: The client portal should work with any web browser, but if you have any troubles, try using Google Chrome – the ReliaTrax developers say this is their preferred browser.

Q: What if I've forgotten my password?

A: On the main login page, there is a button for “Forgot your password?” You will need to enter your e-mail address and click Submit. Follow the instructions in the e-mail.

Q: Can I change my password?

A: You can use the “Forgot Your Password” button on the login page or you can ask your counselor to reset your password. If you are concerned that your login information has been compromised, talk with your counselor – they can change your password for you, change your e-mail address, or turn off access to the account completely.

Q: What if my account gets locked out?

A: Contact your counselor for additional help.

Q: How do the online payments work?

A: The ReliaTrax client portal processes your payments using the Stripe platform. You will need to provide the cardholder name, card number, expiration month/year, and CVC code from the back of the card. You may also be prompted to enter your billing zip code. You can choose to save your credit card information at the time you enter a payment. Any information you enter is encrypted and secure.

Q: Can I send my counselor a message in the client portal?

A: Not yet, but hopefully soon! The ReliaTrax platform is always being updated, and that is a planned feature.

Q: Can I see documents I've signed in the client portal?

A: Not yet, but hopefully soon! The ReliaTrax platform is always being updated, and that is a planned feature.

Q: Can I change my contact information in the client portal?

A: If your counselor has assigned you the "Client Profile Forms" task, you will be able to edit your mailing address, but you will not be able to change your e-mail or phone number. Contact your counselor to have those updated.

Q: After I have finished services, will I have access to my portal account?

A: No, after you are discharged, the portal account will be automatically switched off.

Q: Can someone else make a payment for me? Can I make payments for someone else (e.g., for my child)?

A: Yes. A counselor can create additional portal accounts for a client. There is no need to share your login or password with anyone else. Please note that the client must sign a release of information for this purpose before we can create another portal account. Additionally, there is no way to customize or filter the information shown to the second user account – they will be able to see the same information that you see (as in, they can see your enrolled treatments and upcoming appointments).