

Maintain client relationships while
working securely from any device in any
location

 SPECINS

Client Engagement
MODULE



Easy information sharing with clients

The E-CINS Client Engagement Module is a cloud-based platform that allows clients to safely share information with you and you to share in return. This completely secure system makes it easy to store, access and update action plans, safety plans and all other documentation that will help a client on their support journey.

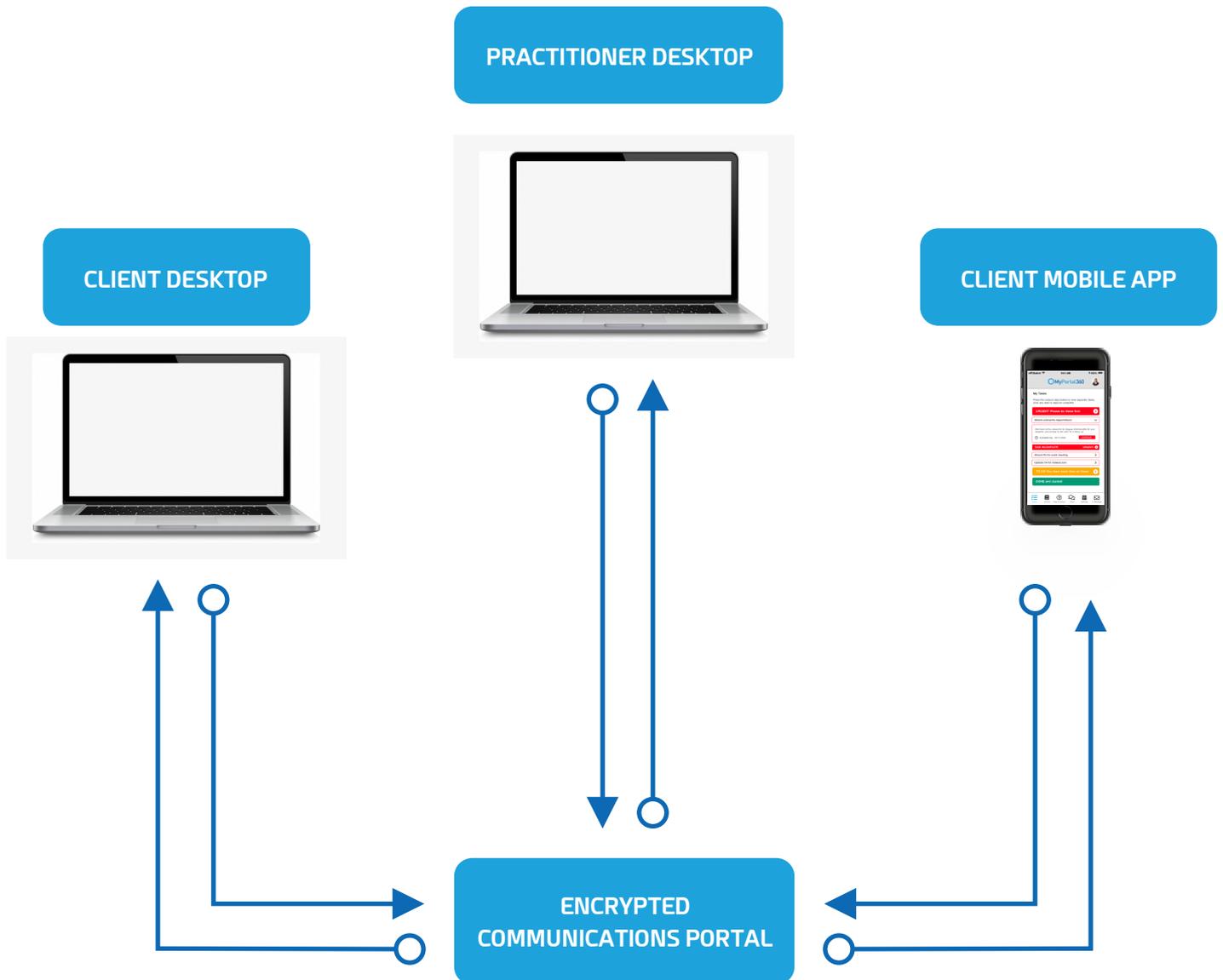
Creating collective ownership

By giving clients a convenient and organised way to stay on top of their support arrangements, the Client Engagement Module allows them to feel more in control of their own situation. This ownership over their own support leads to improved engagement and outcomes.

Helping clients stay on track

Ensuring appointments are remembered and attended is key to achieving positive results. With automated reminders, including emails, SMS's, calendar notifications and alerts, the Client Engagement Module helps individuals keep on top of their commitments.

✉ Reduces face-to-face meetings



Achieve more in the cloud

Work securely from existing devices

E-CINS is a 100% web-based solution that allows you to work securely and remotely from any device.

A single record accessed from anywhere

The Client Engagement Module presents a single view of each client, building their profile automatically through linking every relevant document or interaction. This means staff can access real-time information from anywhere, allowing them to resolve issues and concerns faster.

All of your teams Clients under one 'cloud'

This enables you to easily navigate between them using our intuitive and easy to use dashboard.

Free up staff time

The smart client engagement features built into the Client Engagement Module mean staff can easily assign tasks, see priority activity, coordinate support, as well as determining compliance and non-compliance. This saves a huge amount of time, freeing staff up to focus on higher value activity.

Maintain control over user access

With the Client Engagement Module you can add, edit and configure all of your own user accounts and areas, to ensure only those that need access have access.



Desktop App for Practitioners

Working well on its own as a secure standalone desktop application, the client management module also seamlessly interacts with the case management module, enabling you to also task clients from your case management system. With the case management module you can:

- **Register clients remotely** - invite clients to login via a free App or desktop
- **Assign clients** - each client can be linked to key worker
- **Set tasks for clients** - direct to a secure mobile app
- **Communicate with your clients** - via secure messaging and optional chat
- **Create events and appointments** - in a client calendar complete with reminders
- **Help and advise them** - with our library of articles or easily create your own
- **Get instant notifications** - both in-system & optional email updates
- **Show client engagement** - with task history, timelines and logs
- **Reduce the need for face-to face meetings** - saving valuable time





My Portal 360 Mobile app for clients

The Client Engagement Module system for practitioners links seamlessly to the secure MyPortal360 Mobile App for your clients. This gives you the ability to engage with your clients wherever they are and at any time. The App can be used on IOS and Android phones and mobile devices and is free to download.

From the App, clients can:

- **Receive 'push' notifications** - about Tasks, Messages & Appointments
- **Respond to messages & tasks** - with text & by sending/receiving attachments
- **Complete tasks** - which sends notifications back to the Practitioners
- **View their personal calendar** - which contains their Events & Appointments
- **Access targeted information** - on Employment, Addiction, Mental Health & more
- **Create shared & private journals** - to record their daily thoughts & mood
- **Cloaked app** - for additional security for vulnerable people and Client safety
- **GPS tracking** - optional feature that Clients can disable

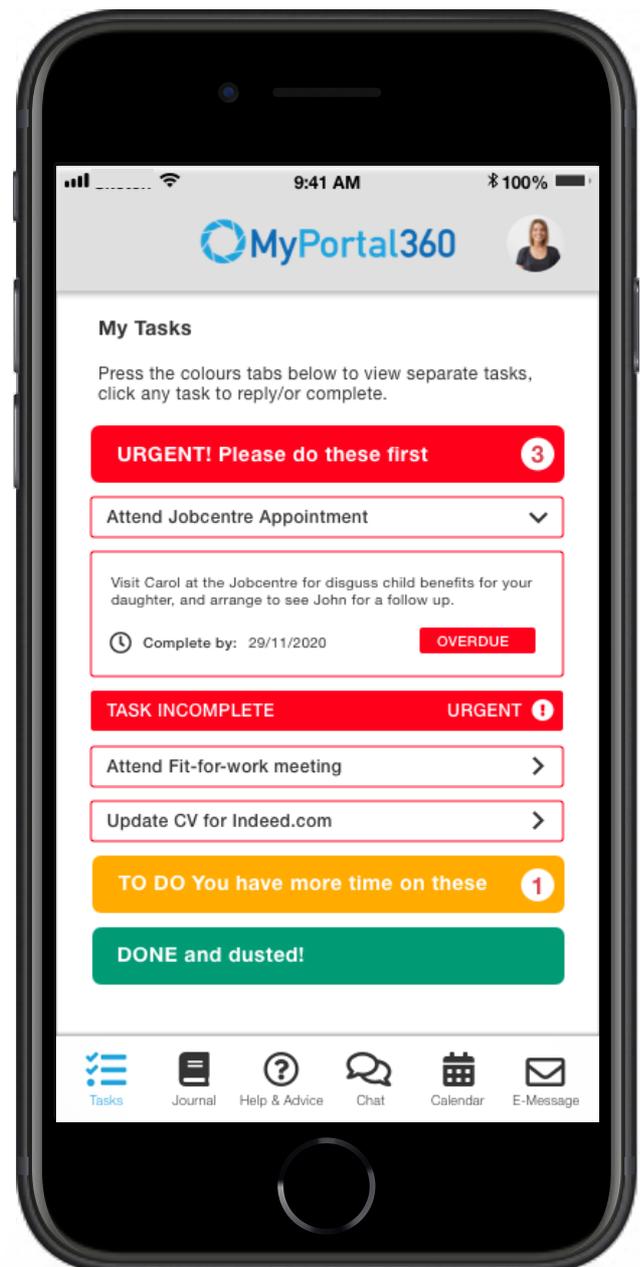


Task your clients

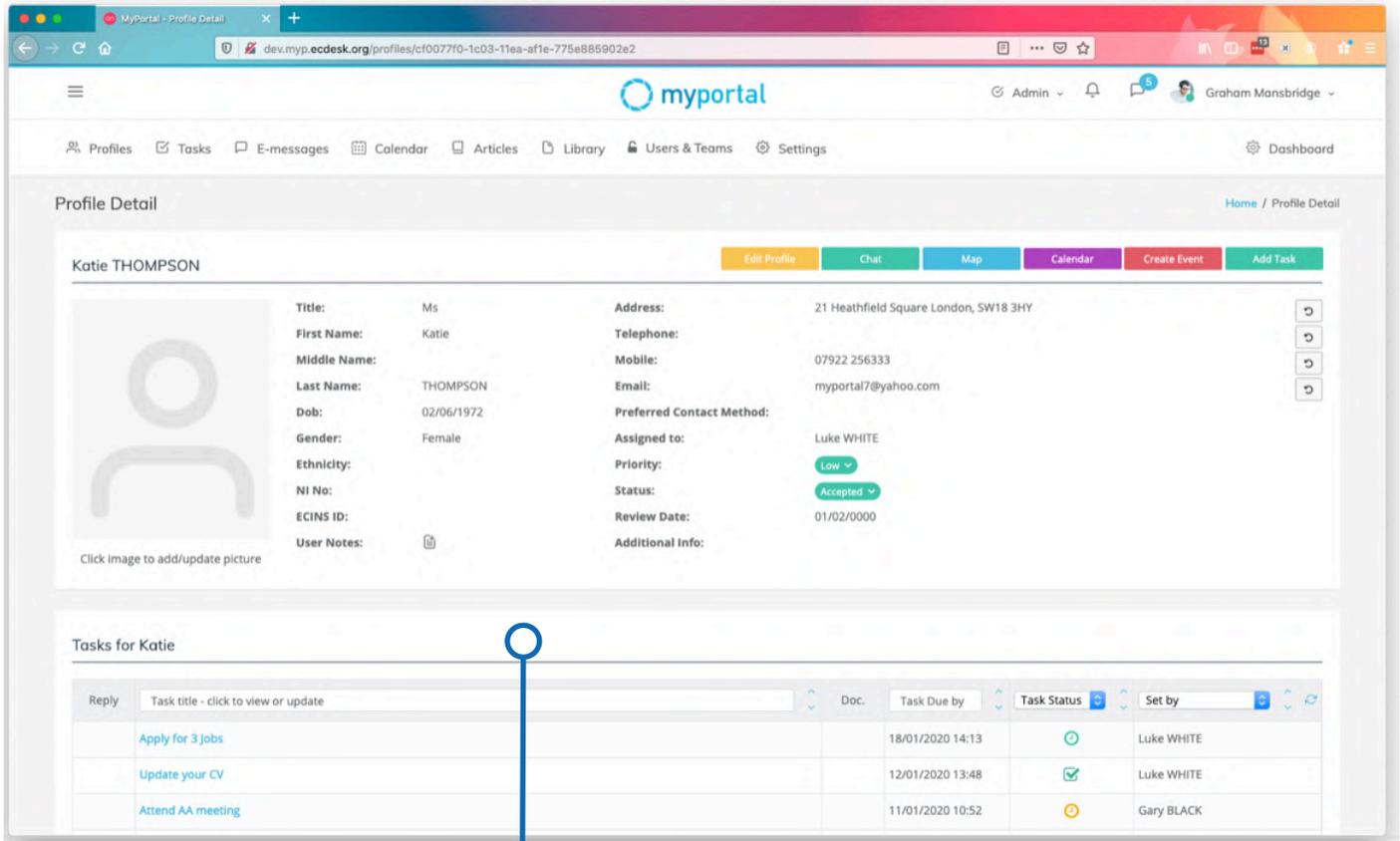
MyPortal enables practitioners to create tasks for individual clients. Practitioners have the option to task their clients directly from E-CINS.

Tasks include:

- **A completion date & time** - by which time client should mark Task 'Done'
- **Attachments** - files, forms & photos can be sent by both client & practitioner
- **Task related messages** - clients can ask questions about the Task
- **Practitioner override** - tasks not completed satisfactorily can be 're-tasked'
- **Status related notifications** - on Task Creation, Due Soon, Overdue and Done



Share safety plans and files securely



Katie Thompson Initial Safety Plan **Case Id 12397**

Katie Thompson **Profile Id 12397**

Protection Planning

1. Ring 999 in an emergency and 101 for all other incidents

yes

Practitioner Notes: Advice given by Sarah Pettengell on 14/1/20

2. Check to see who's at the door before opening it

yes

Practitioner Notes: Advice given by Sarah Pettengell on 14/1/20

3. Consider escape routes from the property

yes

Practitioner Notes: Advice given by Sarah Pettengell on 14/1/20

4. Identify a safe room in the house that can be accessed in the event that you are not able to leave the property

yes

Practitioner Notes: Advice given by Sarah Pettengell on 14/1/20

Printed on Tuesday 14 January 2020 After use - Please destroy by shredding Printed by: User ID 1438



Safety Plans can be shared securely via the MyPortal Client Engagement System



MyPortal tasks as a motivation tool

'Most professionals have faced the problem of having clients with low motivation. Yet are rarely given the tools to specifically motivate clients to achieve outcomes.'

During the design stage of the MyPortal360 development we set out to provide a solution for this problem. One proven approach to motivating and giving clients ownership is based on the concept of tasking clients.

This can be as simple as tasking a mother to buy some apples or for a young person to attend school so many days per week, through to giving an offender ownership of what they have agreed to do.

A good example of this is on the deferred charges programme. In return for receiving a caution, an offender agrees to attend an anger management course, repair the property they damaged and write a letter of apology. Having agreed to this, these conditions or 'tasks' would be sent to them via MyPortal. As they are completed they can mark them as complete and can upload documentary evidence where appropriate.

In certain business areas, MyPortal tasking involves setting actions or behavioural challenges for the client to carry out between one-to-one sessions. Clients can give updates and even log their feelings in their MyPortal Journal.

Using MyPortal as a Tasking Tool can create a change in the clients routine which can bring about a change in their behaviour and a positive change in someone's complex life'.

Gary Pettengell, CEO, Empowering-Communities



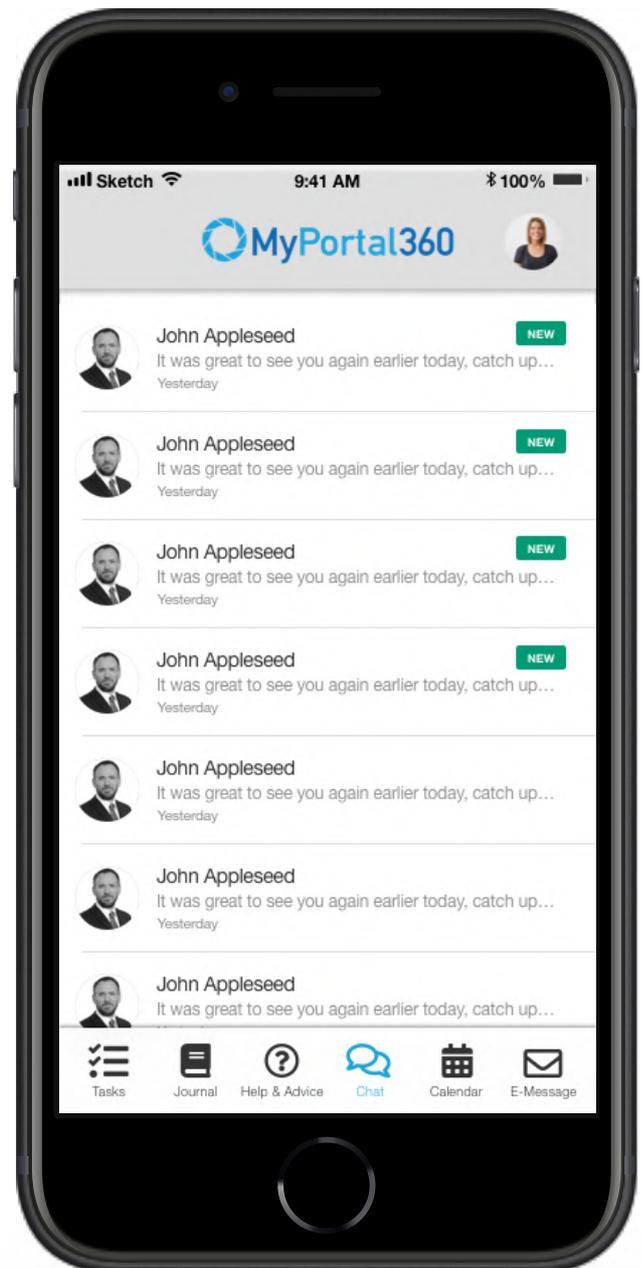
Client messages

As well as being able to communicate with task related messages, MyPortal enables you to communicate with your clients using e-messages. These are similar to email threads but are more secure and have a number of advantages:

- **More secure** - encrypted, securely hosted in data controller's country
- **Easier to manage** - all your Team can send, view and respond
- **Practitioner initiated** - clients cannot instigate new Messages
- **Notifications** - on message replies both in-system and via optional email

There is also an optional 'Chat' messaging for less formal communication.

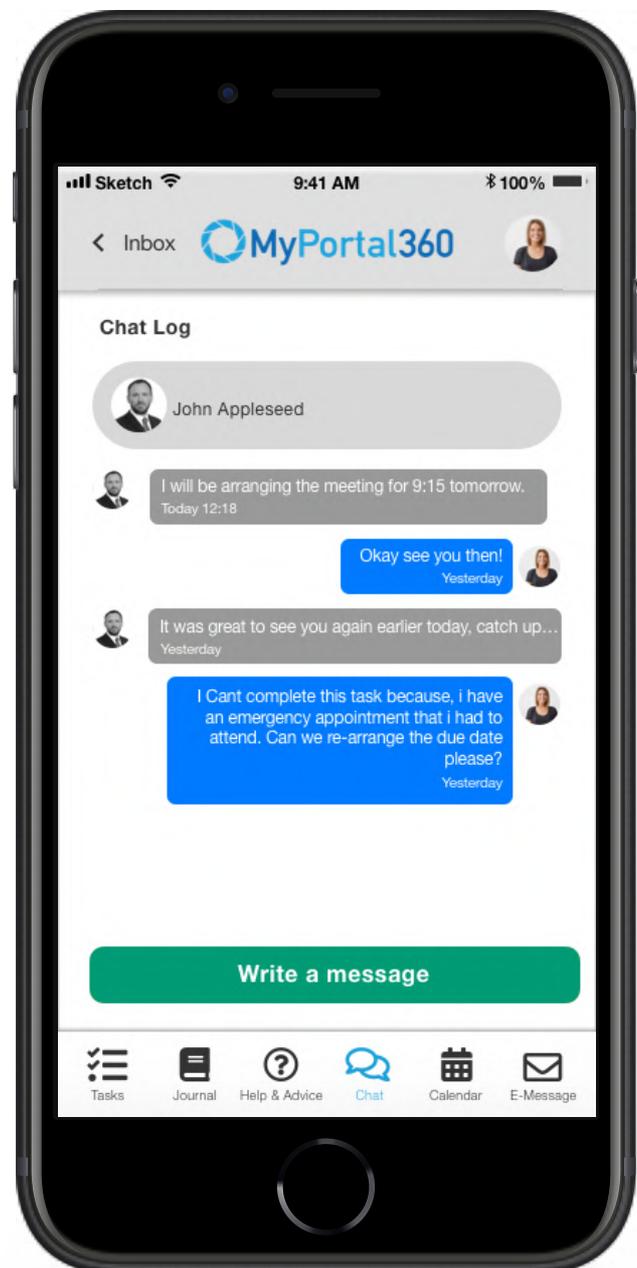
This can be instigated by the client but can only be sent to the assigned practitioner. A safety warning is displayed before each message explaining that it is not monitored.



Chat

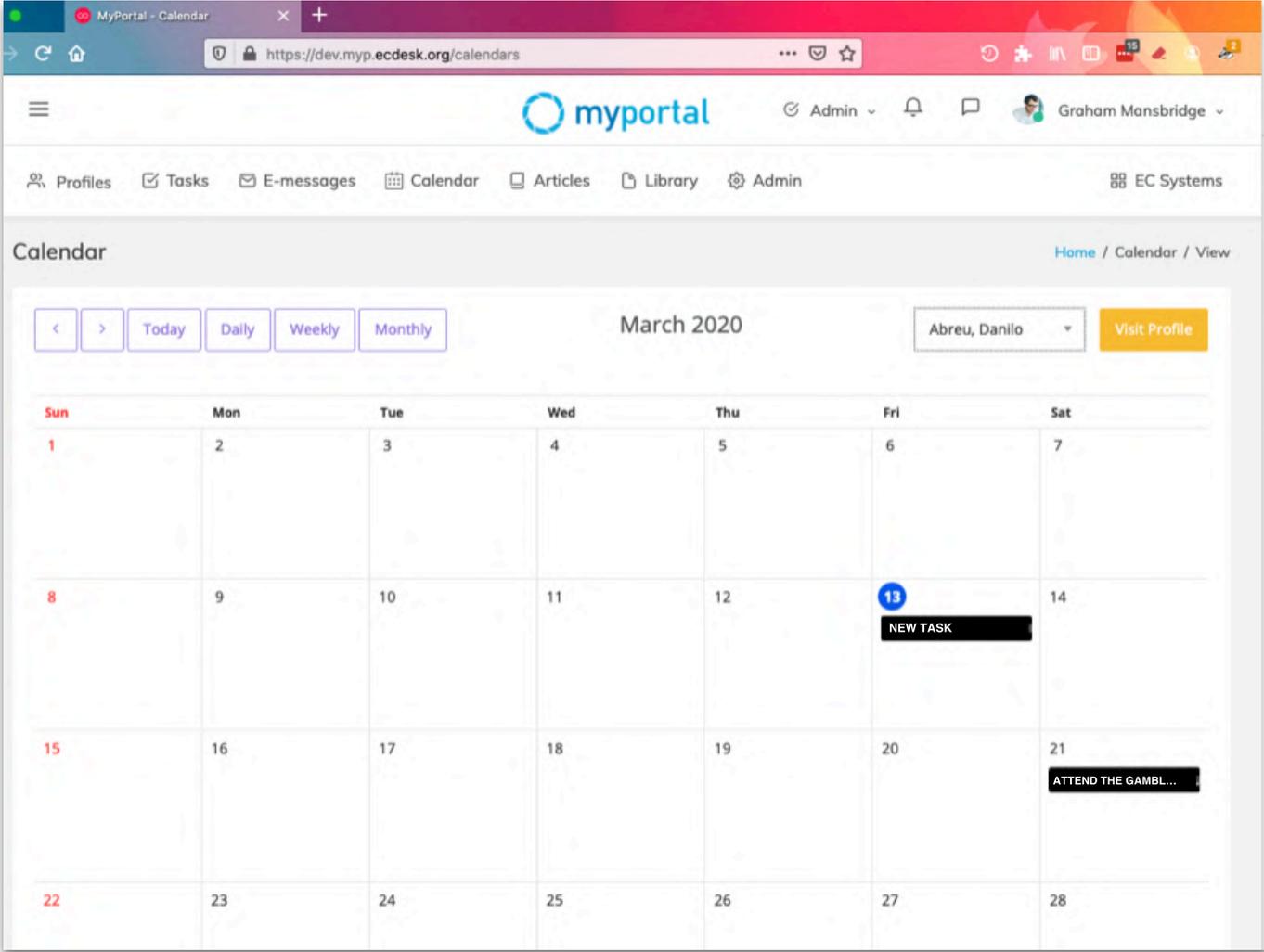
'Chat' is an optional, quick and easy-to-use messaging system within MyPortal360. If enabled on your system it allows clients to message your team. Unlike e-messages chat messages cannot be scheduled and documents and files cannot be attached by user or client.

- **Chat is optional** - if your team does not want 'Chat' enabled it can be switched off
- **Chat can be viewed by the entire team** - any team user can join in
- **Notifications of new messages** - go to assigned user only



Client calendar

The Calendar displays all events and tasks for all clients of the entire team.



The screenshot shows the MyPortal - Calendar interface. At the top, there's a navigation bar with the MyPortal logo and user information for Graham Mansbridge. Below that, a menu bar contains links for Profiles, Tasks, E-messages, Calendar, Articles, Library, and Admin. The main content area is titled 'Calendar' and shows a monthly view for March 2020. Navigation buttons for Today, Daily, Weekly, and Monthly views are present. The calendar grid displays dates from 1 to 28. A task 'NEW TASK' is highlighted on Friday, March 13th, and another task 'ATTEND THE GAMBL...' is highlighted on Saturday, March 21st. The user profile 'Abreu, Danilo' is visible in the top right corner.

- **Events** - click to open a pop-up and view more detail
- **Tasks** - these are displayed on the task due date
- **Filtering** - this enables users to view a selected client's calendar

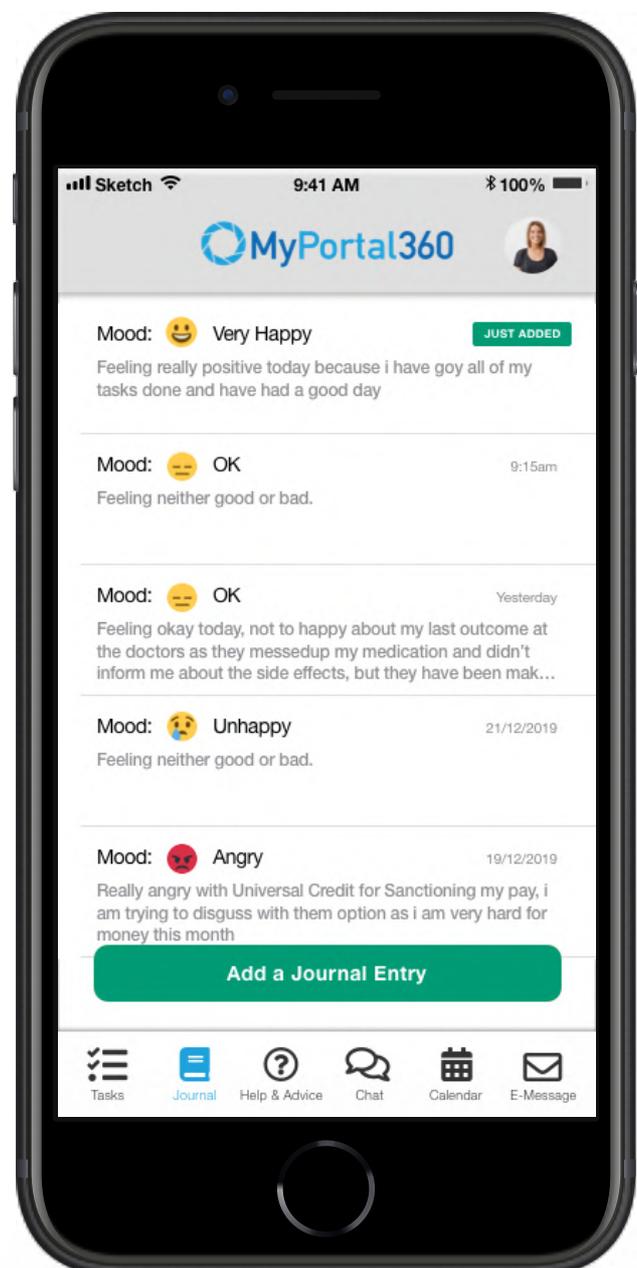
In the Client Mobile App the calendar is displayed as a timeline which makes it easier for a client to see what needs to be tackled next.

Self-assessment journals

The MyPortal Journal enables clients to keep a record of experiences and feelings. For example, a journal can be used to record recovery-related struggles and accomplishments or to identify and work through difficult emotions.

There are many different types of journaling and MyPortal works well as:

- **A diary** - clients write down the events of the day and how you felt about them
- **An evening reflection journal** - where you reflect on the day's events and ponder ways that you may have thought or behaved differently that would have involved better choices
- **A gratitude journal** - where you write about things that you are grateful for and appreciative of
- **A goal focused journal** - where you keep track of your goals and objectives and your progress toward these





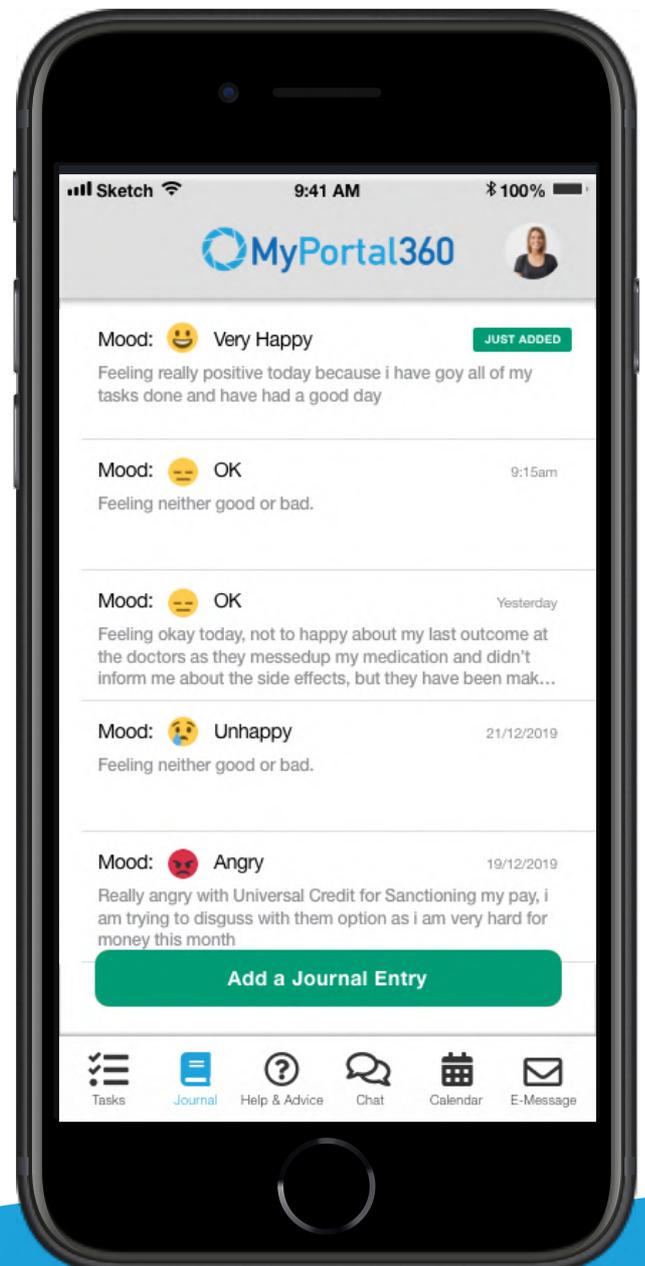
MyPortal Journal as an ASB Diary Sheet

The Client Management Module Journal can act as an ASB diary sheet enabling members of the public to record the date, time and place the behaviour happened, what they were doing at the time and how it made them feel. This can be shared in real time with an ASB team through their MyPortal Desktop application.

ASB victims can attach images through their MyPortal App. This fully audited process can be exported for court purposes.

How are you feeling today?

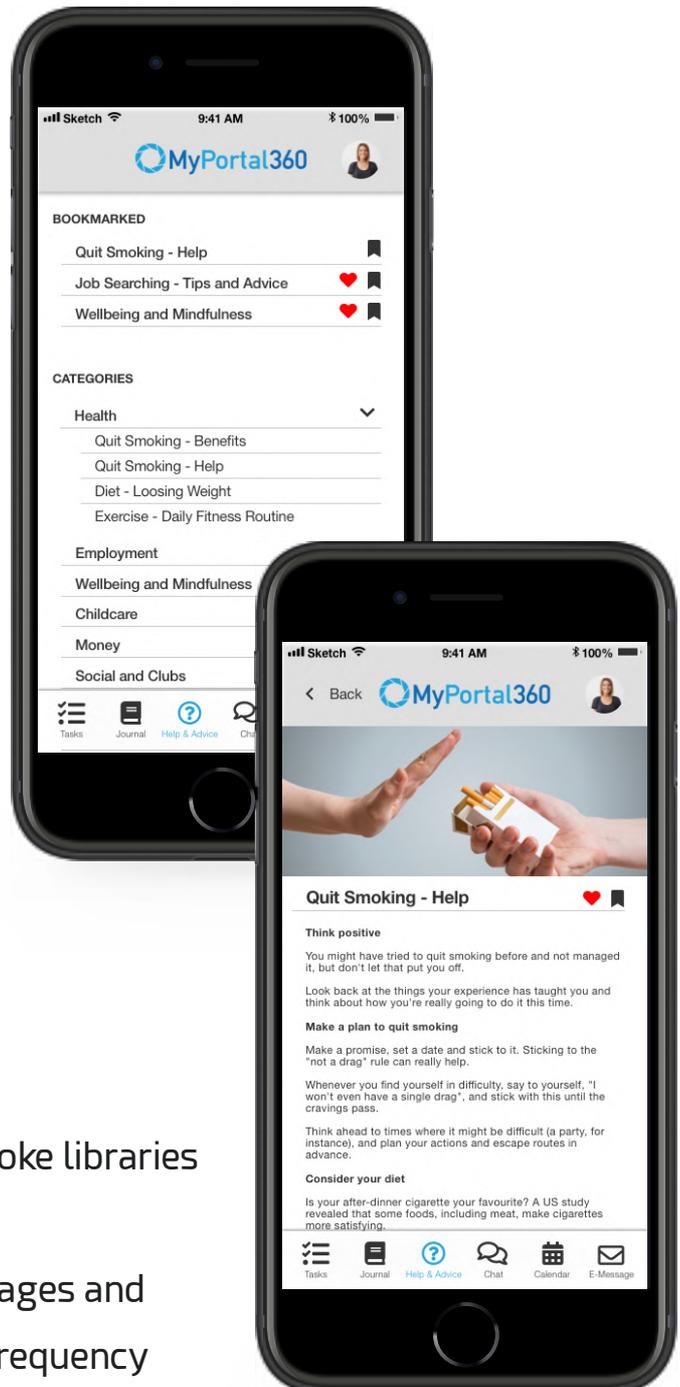
Very Happy	OK
Angry	Depressed
Happy	Unhappy
Anxious	Miserable



Help and advice Library

MyPortal comes with preloaded information on:

- Mental Health
- Addiction
- Victims
- Loneliness
- Lifestyle
- Health
- Attitude, Thinking & Behaviour
- Accommodation
- Domestic Abuse
- Education, Training & Employment
- Finance, Benefits & Debt
- Fitness



Teams can upload and create their own bespoke libraries for their cohort.

Clients can also like and have favourite messages and choose to have motivational messages at a frequency that is best for them.



Easy three step implementation process

You might have considered new software as a solution before. But though you know it is going to make your life easier in the long run, the idea of taking time to learn can feel like too much, when your time is already so stretched.

We know this. That's why we have made all the hard stuff that goes along with software, intuitive and easy. We also provide full support and training to get your team up and running in no time at all.

Step 1

Complete The Client Engagement Module set up questionnaire

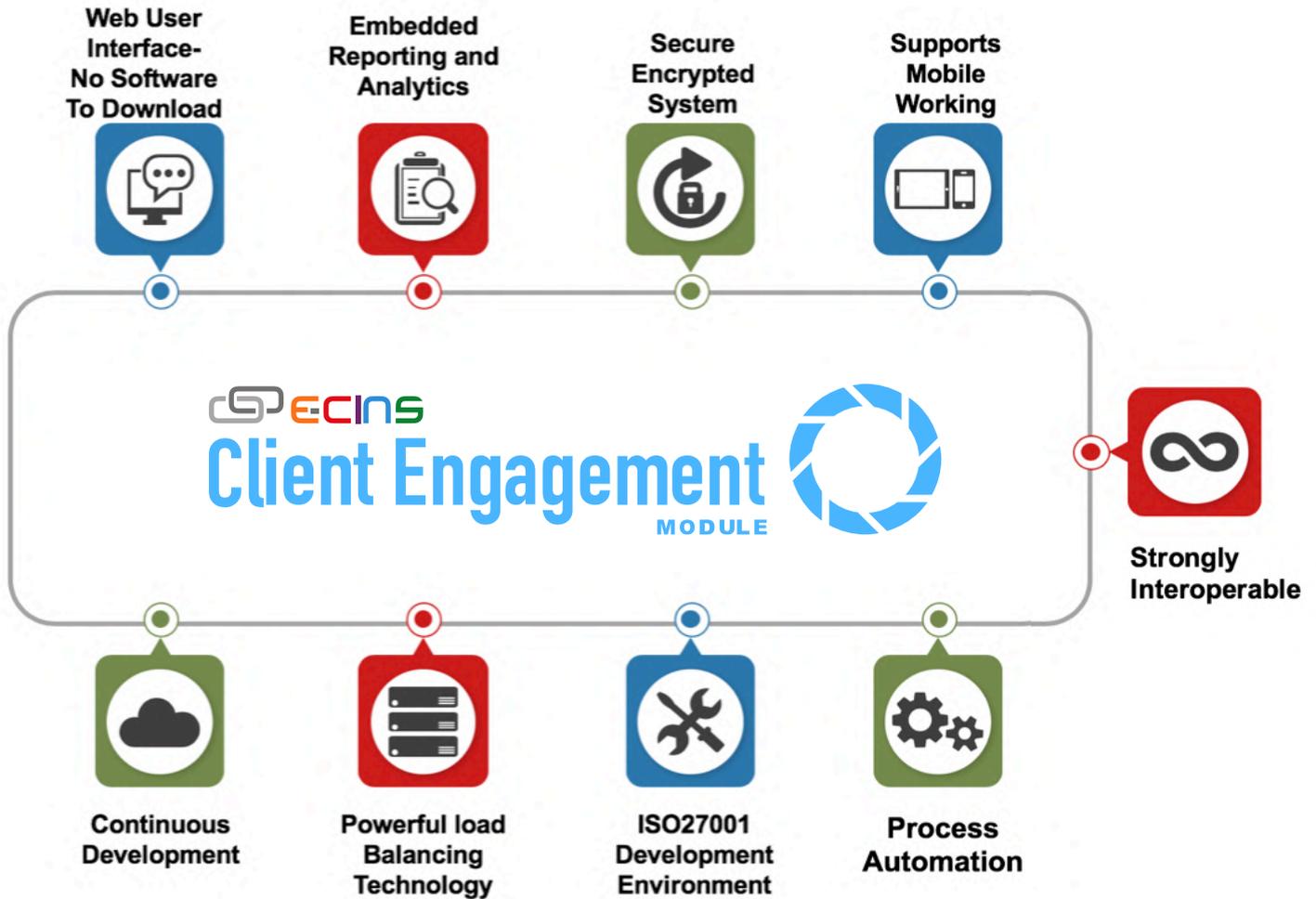
Step 2

System set up and training completed remotely by E-CINS

Step 3

Send invites to your clients and start working remotely with them

Secure ISO27001 Infrastructure



ISO27001 Enterprise Level Platform
Deployment & Security Model





Reduces face-to-face meetings - maintain client contact without the need to meet face to face, saving time, money and increasing engagement



Secure - GDPR compliant, Tasking, Messaging & Diary system for public clients plus much more



Desktop App for Practitioners - with Instant Notifications both in-system & via optional emails



Mobile App for Clients - iOS and Android with Push Notifications for Tasks, Messages & Events



Task Clients - direct to their mobile phone



Send E-Messages - secure practitioner initiated 2-way Messaging with Attachments & Timeline



Chat - optional client initiated messages to assigned practitioner



Individual Client Calendar - displaying Events & Task due dates with practitioner view



Self-assessment Journals - get an insight into your client's world with Shared Journals



Help & Advice for Clients - both pre-loaded and practitioner author-able



No practitioner user licences - to maximise participation

FAQs:

Will our clients find MyPortal easy to use? Yes. MyPortal has been designed to be used by all age groups and those with the lowest technical ability. Feedback from our user focus groups was that MyPortal was easier to use than some social media platforms. Your clients will also be able to access 'how to' guides that they can download from the document section of MyPortal.

Is data on Client Engagement Module backed up? Yes, your data is backed up every 30 minutes 24/7 and is encrypted at rest.

Do we or our clients have to download any software to use the Client Engagement Module? No. As this is a web-based system, you and your clients just need a modern browser to access the client engagement module

Can I use the Client Engagement app to manage our volunteers? Yes. The functionality within MyPortal lends itself really well for the management and coordination of volunteers. You can, for example, put appointments and reminders in their calendar and set them time bound tasks.

Do our clients have to pay to download the MyPortal App? No. For clients to download the MyPortal360 mobile app they simply need to head to the app store where they can download it for free.

Can we export our data? Yes, the Client Engagement Module has comprehensive reporting capability.

What teams is the Client Engagement Module suitable for? All teams and their clients can benefit from using this platform.

We are in business to improve people's lives.
Not just the lives of people within the community but also the
working lives of practitioners who are trying to help their communities



Empowering-Communities 2020

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