



# Client engagement module + MyPortal360



## More efficient work practices

*The client engagement module is an encrypted web-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 all documentation to help a client on their support journey.*



## Allows ongoing connection without in-person meetings

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With flexible options for back and forth messaging, regular real-time mood updates to allow prompt intervention and a library of support information and crisis contacts, clients can access the help they need when they need it.



## Helping clients stay on track

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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.



## A single record accessed from anywhere

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Forget missing documents and important data saved in multiple non-secure locations. See a single view of each client, build their profile automatically and link every relevant document or interaction. This means staff can access real-time information from anywhere, allowing them to resolve issues and concerns faster.



## Free up staff time

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Smart features mean staff can easily see priority activity, coordinate support, filter searches based on specified parameters as well as determining client compliance and non-compliance. Messages can also be sent to individuals or distribution groups and scheduled ahead of time or on a recurring basis. This saves a huge amount of time, freeing staff up to focus on higher value activity.



## All of your team's clients under one 'cloud'

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Have a bird's eye view of all clients to assess your caseload and easily navigate between individuals using our intuitive and easy-to-use dashboard. No more scrappy files and wasted time opening multiple documents.



## Oversee staff and manage permissions

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Easily see the number of profiles staff members are responsible for and active clients using the system. Add, edit and configure all of your own user accounts and areas, to ensure only those that need access have access.



## No practitioner user licences

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When the system is being used by multiple practitioners, user licences can add up to make the cost prohibitive. Our goal is always to maximise participation and help the most people. That's why we don't charge for individual licences. You buy the system, you can add as many practitioners as you want.

## Improve client motivation and program outcomes

*Most professionals have faced the problem of clients with low motivation. Yet rarely is this problem tackled head on with proven tools specifically aimed at motivating clients to achieve outcomes.*

## Create collective ownership

By giving people a convenient and organised way to stay on top of their support arrangements, the MyPortal360 App allows them to feel more in control of their own situation. This ownership over their own support leads to improved engagement and outcomes.

## Staying on task

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 client to turn up to an appointment, setting a goal for a young person to attend school so many days per week, or providing a list of actions to give an offender ownership over their behaviour and providing tangible steps for making amends. The success of ticking off each simple task provides a highly motivating feeling of progress.

## Reducing overwhelm through simple design

Large life problems are overwhelming enough without complicated design making them seem even more so. Our interfaces use best practice user experience UX design techniques aimed at making tasks seem easier and requirements undemanding. Less overwhelm means problems can be tackled one step at a time.

## Progress made and rewarded

With easily identifiable colours for tasks completed and outstanding, in-built rewards and helpful prompts and alerts to keep clients on track, progress is made more easily and effort is recognised in real-time.

## Adaptable to the language of your organisation

Using the wrong words at the wrong time can be dehumanising. Whether you are interacting with students, tenants, participants, volunteers, patients, residents, or any other type of group, the client engagement module can be adapted to mirror the language you use and the terminologies particular to your organisation.

## Designed for maximum ease of use

Technology can be frustrating. That's why the MyPortal360 app has been designed for those with the lowest technical ability across all age groups. Simplicity is our driving force and feedback from user focus groups said MyPortal360 was easier to use than some social media platforms.



# For practitioners

## Task your clients to help with behaviour modification

- › A completion date and time
- › Attachments - files, forms and photos can be sent by both client and 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

## Behaviour modification programs

- › Record the date, time and place of triggering incidents, what they were doing at the time, who they were with, how the event made them feel and the way they responded. This can be shared in real time with practitioners so if intervention is needed, it can happen more quickly.

## Create action and safety plans and files securely

- › Use custom forms to create action and safety plans
- › Easily see how actions are tracking
- › Share plans with client for them to see and store on their MyPortal360 app

## Client messages

As well as being able to communicate with task related messages, MyPortal360 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 unless you grant that permission
- › Practitioner-led option to limit message overwhelm
- › notifications - on message replies both in-system and via optional email
- › optional 'chat' messaging
- › automatic safety warning is displayed before each message explaining that it is not monitored.





### Client calendar

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

- events - click to open a pop-up and view more detail
- tasks - these are displayed on the task due date
- filtering - view a selected client's calendar

In the MyPortal360 App the calendar is displayed as a timeline which makes it easier for a client to see what needs to be tackled next.

- reduce face-to-face meetings without losing connection
- easily show client engagement with task history, timelines and logs
- assign clients to key worker
- build a single view profile of clients
- increase and track engagement
- completely secure GDPR compliant with ISO27001 enterprise level infrastructure
- create tasks with due dates and events in client calendar
- share action and safety plans
- instant notifications for practitioners and clients
- secure practitioner-initiated two-way messaging with attachments and timeline

- optional client-initiated chat messages to assigned practitioner
- individual client calendar displaying events and task due dates with practitioner view
- help and advice library for clients (both pre-loaded and practitioner authored)
- web-based app to allow you to work securely from any device in any location
- communicate to client computer or phone via MyPortal360
- Instant and optional email updates
- all your teams under one cloud
- client-activated GPS tracking for those who want their whereabouts known
- seamlessly interacts with ECINS case management module so task clients from case management module if you prefer

# For clients

## Chat

'Chat' is an optional, quick and easy-to-use messaging system within MyPortal360.

If enabled on your system, chat allows clients to message approved individual practitioners or entire teams.

- Chat can be viewed by the entire team if desired
- Notifications of new messages go to assigned user only

## Video Chat

Speak face-to-face with clients with the secure, end-to-end encrypted video conferencing tool.

- Allows remote clients to build more meaningful relationships with practitioners outside their geographical area
- Ensures uninterrupted support when in-person meetings aren't possible

## Self-assessment journals

The MyPortal360 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 MyPortal360 works well as:**

- A diary - you can 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

## Support library

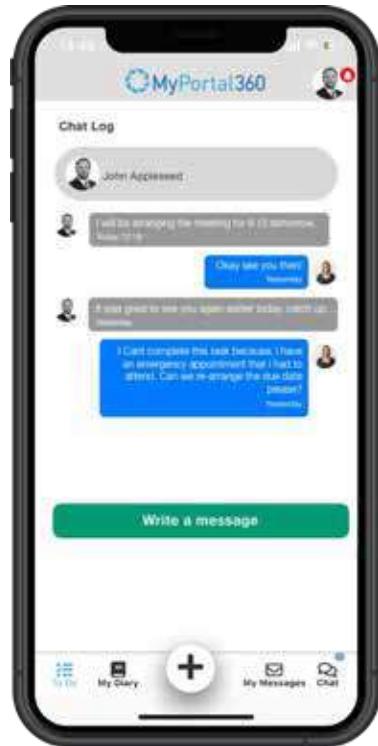
Upload your own information and create a bespoke library or use the library of preloaded information covering topics like mental health, addiction, domestic abuse, accommodation, loneliness, lifestyle, attitude thinking and behaviour and more.

- Users can easily edit and update their articles
- Clients can like and favourite messages
- Clients can choose to have motivational messages delivered at customised frequencies
- All articles can be grouped by category



*'The difference ECINS is making to our organisation for efficiency, effectiveness, accessibility and managing our caseloads is enormous; it is transforming the way we can store and manage the families we are supporting.'*

**Kirsty Richardson, Head of Operations for Tiny Life**



- free app for clients to download
- 'how to' guides to show how to use the app that clients can download from the document section of the app
- shared self-assessment journals to gain greater insight into your client's world
- can be a cloaked app for vulnerable people and client safety
- receive helpful push notifications about tasks, messages and appointments
- respond to messages and tasks
- send/receive attachments
- can be used on IOS and android phones and mobile devices

- complete tasks sends notifications back to the practitioners
- view their personal calendar of events, tasks due and appointments
- access targeted information on employment, addiction, mental health and more
- create journal entries to record daily thoughts and mood to share with practitioner
- optional GPS tracking for people who want to make sure others know their whereabouts at all times (that can easily be disabled)

## Achieving effective outcomes and behavioural change



*Joe\* got into a dispute with his neighbour that ended in him taking a sledgehammer to their shared fence and cutting down a tree that he felt encroached on his property. When his neighbour discovered what Joe had done he called the police. Joe received a caution for his action that was contingent on him agreeing on some specific actions to make amends.*

### **These were:**

- Attend an anger management course
- Repair the property
- Write a letter of apology

**If he failed to comply his caution would be escalated.**

### **Actions assigned and monitored in the case management module**

The case worker assigned to Joe used the client engagement module to create a file for him. Here, she stored all the court documents, letters and orders related to Joe's case. She set up the three main tasks that were a condition of his caution and set about uploading some specific new information about recognising anger triggers she had come across related to anger management, including links to popular free meditation apps that Joe might like to try.

## Joe uses MyPortal360 to check in and update

Joe was initially reluctant to engage with technology. But after following along on the MyPortal360 tutorial and being shown how easy it was to use, he begrudgingly went along with it. The first time he got an alert from the practitioner managing his case, asking him to complete a mood diary, this was the face he sent her 😠.

Because his practitioner had broken down his anger management course into each lesson as a separate goal, after attending his first class (and receiving a message from his practitioner asking him if he had attended) he was able to tick off that first task on his to-do list. Seeing the task done tick turn green made him feel a little bit better that at least he had done one small thing to get everyone off his back.

While he managed to attend the classes, he was struggling with the letter. Writing had never been Joe's favourite thing. Working with his practitioner they agreed to break the task of writing down into smaller chunks so Joe might be able to see some progress. They had a discussion about what he might write. Task done. Joe wrote a rough draft of the conversation. Done. The practitioner helped him edit the letter. Done. Joe uploaded the letter to the MyPortal360 app and it was added to his file as complete.

While Joe's sorry may not have been all it could be, and he still thought his neighbour should never have grown that tree, he managed to deliver his apology with some sincerity, and achieve everything he needed to meet the conditions of his caution. When he finally ticked everything off his list, the mood diary entry he sent his practitioner looked like this 😊.



\*Joe is an example of the way the client and MyPortal app work together to support positive action

## 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 including existing data transfer and training completed remotely by ECINS



### Step 3

Send invites to your clients and start working remotely with them.

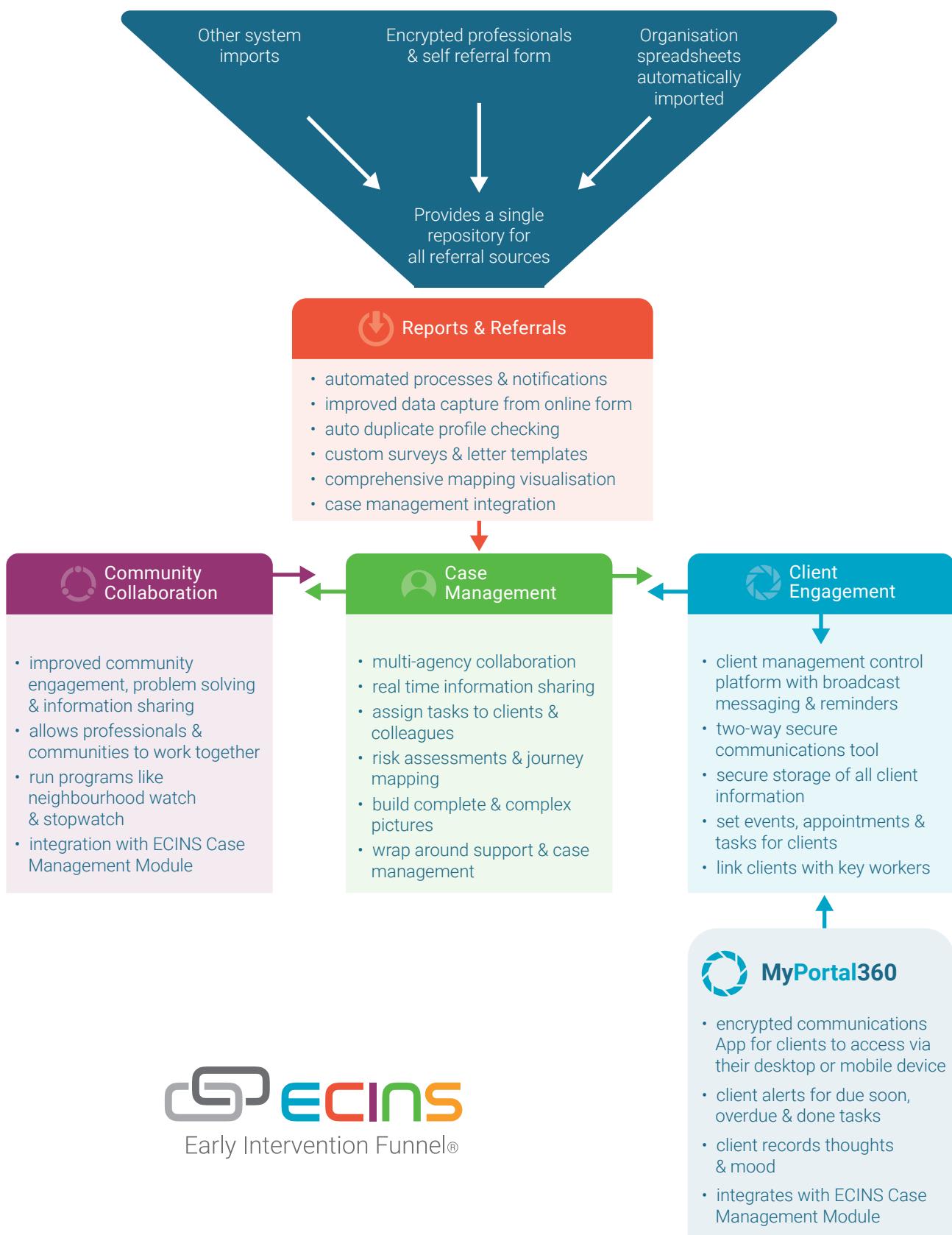
*'With ECINS being a secure cloud-based system, the Support Worker is able to login remotely to get up to date information in realtime and update the system whilst out on family home visits.'*

**Andy Craighead, Peterborough Pupil Referral Unit, Cambridgeshire**

# The ECINS early intervention funnel

From referral to case management, to supporting clients and connecting with the wider community, ECINS is a complete system that enables practitioners to accurately identify risk and

harness opportunities for early intervention to achieve better outcomes for individuals and communities.



## About us

ECINS is a social enterprise with a focus on opening up new ways for people to work together. Our aim is to help people learn from each other and develop more compassionate attitudes by enabling preventative and positive person-centred interventions.

Our background is on the frontline, supporting vulnerable people. For more than 20 years we've been working alongside practitioners to create systems that solve real problems.

After years of co-creation with our user community, we have created the world's first fully integrated referral, case management, client engagement and community collaboration solution. Our fully secure and adaptable system is empowering communities across the UK, US and Australia.

## Book a demonstration today

Don't take our word for it. Let us show you what ECINS can do. Book a demonstration today at [enquiries@ecins.com](mailto:enquiries@ecins.com)

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