Kindering Family Portal Reference Guide

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The Family Portal Experience (web app version)

A. About the Family Portal

The Family Portal is provided by Kindering for use by our families to be reminded of upcoming appointments, access telehealth appointments, complete required forms, sign requested documents, view shared child record data and engage via provider-initiated messaging (if enabled).

B. Getting Started

Access to the Family Portal is available via the following methods:

- Google App
- Apple App
- Google Chrome Web Browser
- Microsoft Edge Web Browser

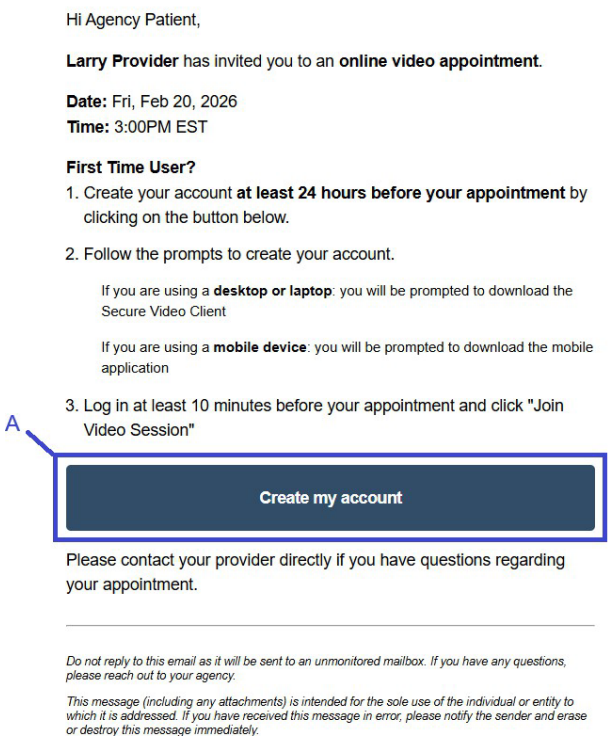
Your invitation to the Family Portal will arrive by email or text. The mode by which you receive your invitation is based on the preference specified in your Kindering profile. For proper communication and to ensure the safety of your health information, you will be required to register for access to the Family Portal. A registration request will be sent by Kindering in conjunction with one of the following actions:

1. Kindering schedules an appointment for the child with their provider
2. Kindering submits a request for your signature on a completed clinical document
3. Kindering requests that you login to the Family Portal to complete a document electronically
4. Kindering initiates a bulk registration invitation request to all families

C. Registration

Please be sure to read the initial notification for important information. Additionally, it is recommended to register your Family Portal account on receipt of the invitation and in advance of the child's scheduled appointment. The invitation and subsequent Family Portal notifications will arrive via the predefined Kindering email address. Please check your junk/spam folders if you do not see the message in your Inbox. Example provided below:

1. The registration process begins by opening the initiating email from Kindering that contains the registration link. The message body will resemble the example shown below. Please read the instructions within the message. When ready, click the "Create my account" link (A).

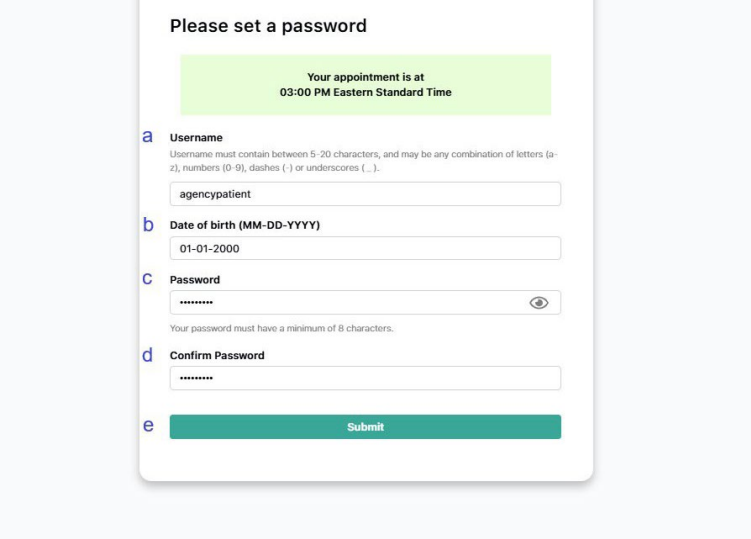


2. Upon clicking the "Create my account" link, a registration form will appear prompting for the following:
    a. Username – The Username must contain between 5-20 characters, and may be any continuous combination of letters (a-z), numbers (0-9), dashes (-) or underscores (_). (ex: agencypatient).
    b. Date of Birth (MM-DD-YYYY) – Please enter THE CHILD'S Date of Birth. It must match the information we have in their Kindering Profile in order to give you access. When entering Date of Birth, it is recommended to manually enter the date. The calendar will appear as you type, but you may disregard. Date entry MUST BE in the format provided. If the numeric month (MM) of birth is single digit, such as January, you must include a leading zero on entry (ex: 01). The hyphen separating month and date of birth must be provided as shown. Regarding the date (DD) of birth, the same applies to single digit dates (1 – 9) and a leading zero must be entered (ex: 01). The hyphen separating date and year must be provided as shown. The year of birth (YYYY)

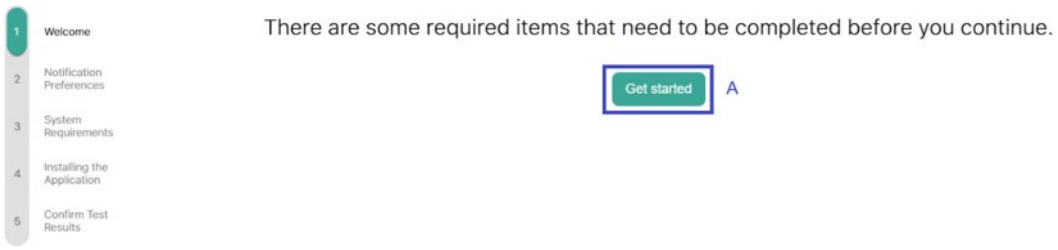
requires all four digits (ex: 2000). If properly entered, the value in the field using the values throughout this example would be 01-01-2000.

c. Password – Password must have a minimum of 8 characters.
d. Confirm Password – Repeat entry of the value previously entered in the "Password" field.

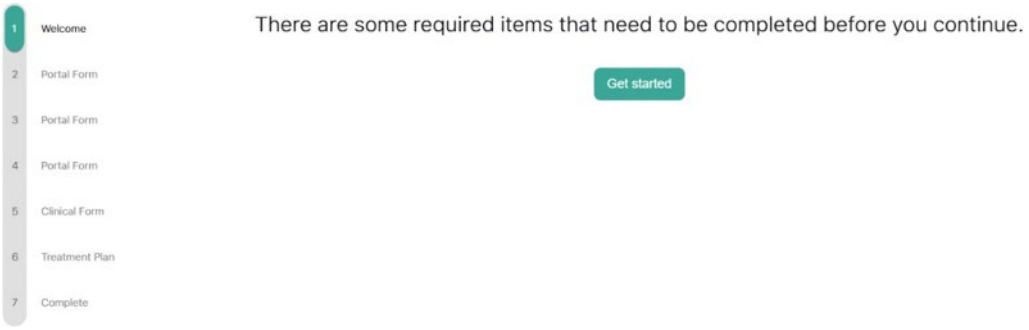
3. Make sure to retain this information as it will be used to access your Family Portal on future visits. When ready, click the "Submit" button (e).



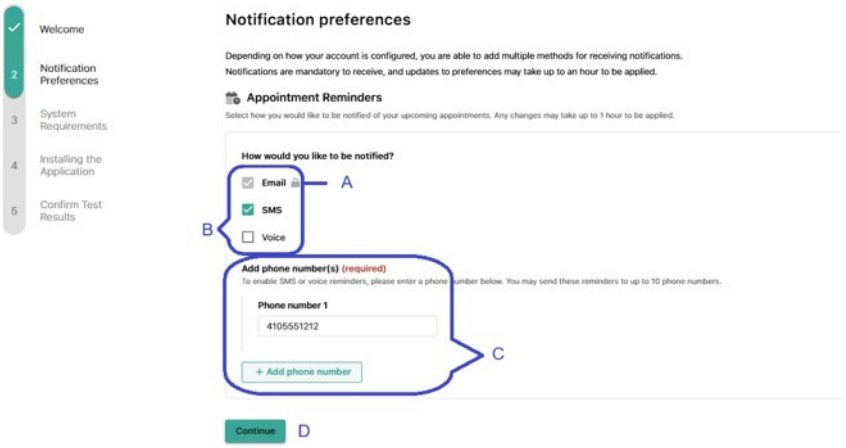
4. On "Submit", you may be prompted to review a Family Portal Privacy Policy document. This document pertains to the use of the Family Portal itself and contains information about how your information is collected, secured and used and to what you are agreeing to by accessing the Family Portal. Please scroll and click the "I Agree" button to complete the login process.
5. On login, the Family Portal home screen will load with an initial action item list. At this and subsequent visits, pending actions requested of you by Kindering will be presented for review and/or completion. In some situations, you may be permitted to skip an action. Other requests may be required in order to proceed with the Family Portal access. The left panel will display the action item list. The right panel will display instructions or resource requests such as a form to sign or complete. Click "Get started" (A) to begin.



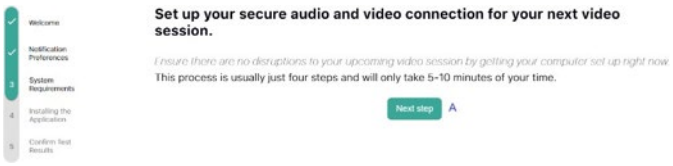
a. On subsequent logins after you have become a registered user, the left panel action list may contain other tasks such Portal Form completion, Clinical Form signatures and/or Service Plan review/signatures. Example:



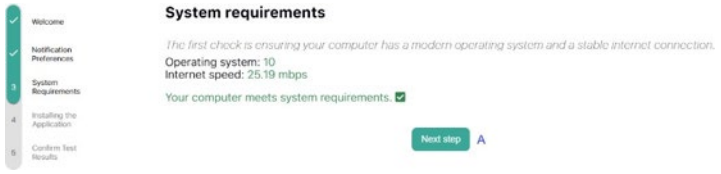
6. Within the portal, you may define your Notification Preferences further. The primary method for notification appears with a lock symbol (A). Although not required, you may also elect additional means by which to receive notifications either by eMail, SMS or Voice (B). With each selection, you will add the mobile phone number(s) or email address(es) (C) to include for these appointment reminders. If you wish to have a caretaker, spouse or other individual participating in the child's care copied on the notifications that you receive, you may add contact information for them here as well. When done, click "Continue" (D).



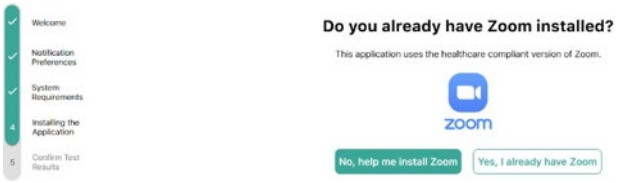
7. The next step is to verify that your existing network and hardware meet the minimum System Requirements and are installed for adequate access and telehealth service session connectivity. This is not required on every visit to the Family Portal. Click "Next step" (A) to proceed.



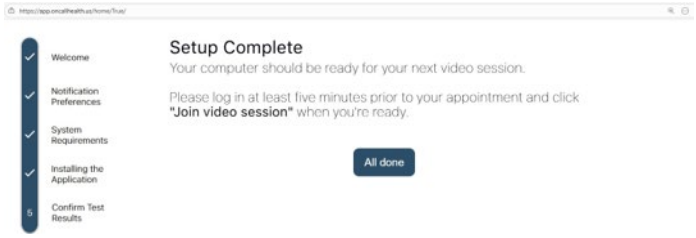
8. If you do not see a “meets system requirements” message such as below, you may experience degraded performance and may need to make adjustments to improve the experience. Click “Next Step” (A).



9. Next, you will be prompted to confirm the status of the Zoom application for telehealth services. Respond accordingly and follow any related prompts if Zoom installation is required.

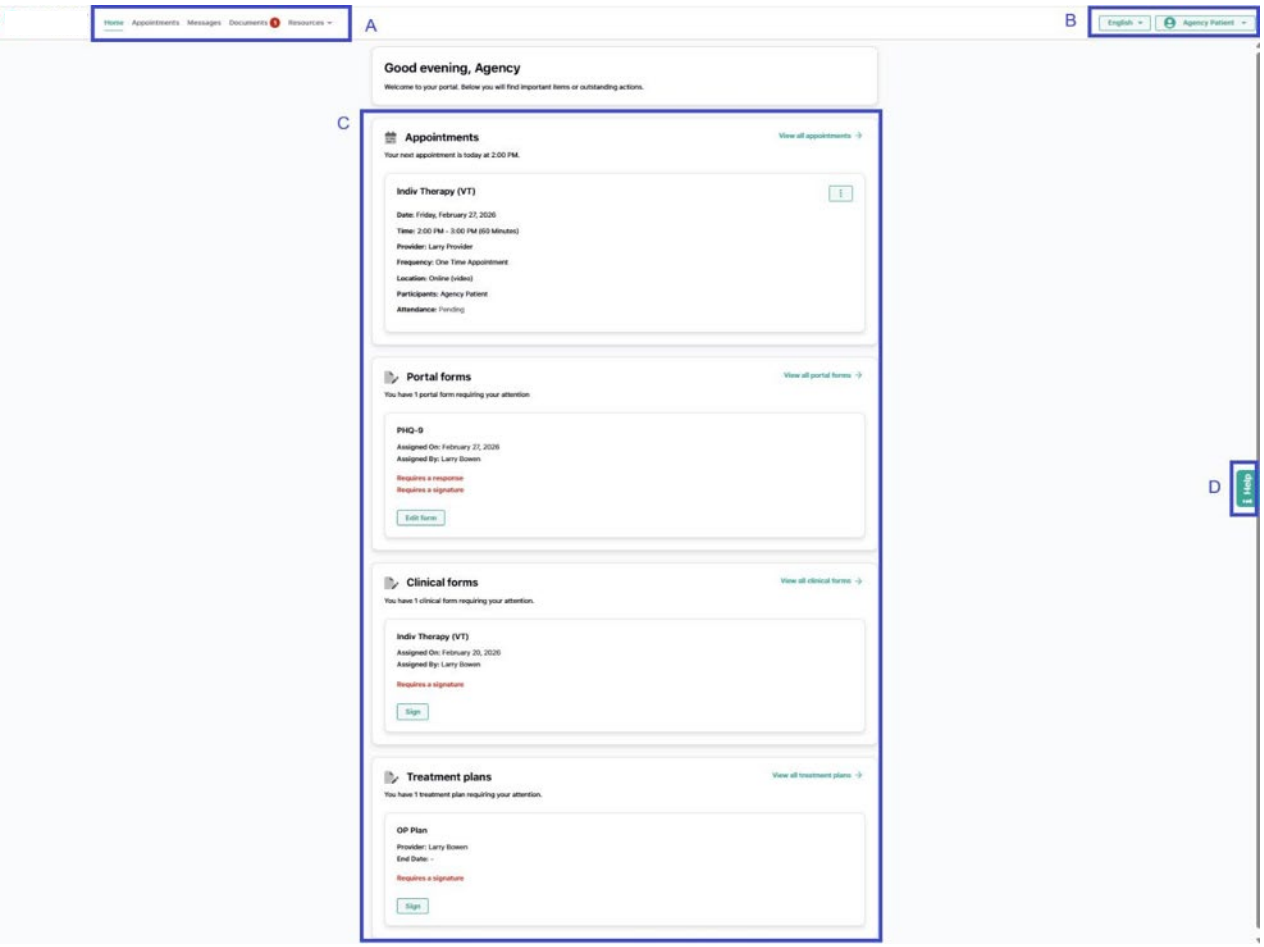


10. Once the Zoom application has been confirmed, the basic setup is complete, and you may click “All done” to proceed to the Family Portal “Home” tab.



D. Navigating the Family Portal

Once the initial action items prompted at login are complete, you will be presented with the Family Portal “Home” tab view. This is essentially a landing page. At the top of the page, navigational tabs (A) appear. At the top right (B), preferences and your Family Portal account information are accessible. In the main body (C) of the landing page you will see next appointment information and any current action items that have not yet been completed. At the right-hand side of the page is an “i Help” (D) Chat Bot Technical Assistant to assist with questions related to Family Portal. Please continue for additional information on each of these areas.



a) Navigational Tabs (A)

The Navigational tabs allow for quick access to various resources within the Family Portal. Tabs that you will find here include:

- Home - The Home tab is where you land upon login. On this page, you will find information regarding upcoming appointments and portal forms that have been requested for completion
- Appointments – This tab provides access to Upcoming and Past appointment information
- Messages – This tab houses any Active or Archived Message conversations that have been initiated by Kindering staff with you. NOTE: Conversations must be initiated by Kindering staff and cannot be started by the family.
- Documents – This tab contains Clinical Forms, Portal Forms, Files and Service Plans that have been shared with you or requested from you. If any pending items are present, a red circle with a number will appear.

- Records – This tab may contain relevant electronic health record information as related to the child's demographics, contacts, care team, diagnoses, labs, medications, vitals, allergies, immunizations or insurance (coverage).
- Content (Resources) – The label of this tab may vary but houses a list of clickable resources that Kindering has provided for convenient access during the child's developmental support journey.

b) Preferences and Account Information (B)

The Family Portal Preferences and Account Information consists of:

- English (Language) – This dropdown allows you to select a preferred language for use within the Family Portal. NOTE: Family Portal may not be able to translate all shared information.
- Account Dropdown (Profile Picture) – This menu provides access to My Account information, a Webcam and Microphone test utility for telehealth appointment preparation, a link to Contact Support with portal usage questions and the Sign Out feature when you are ready to leave the portal session.

c) Action Item Main Body (C)

The Action Item panel with the Main Body is a ready reference to the following:

- Appointments – Details of the next scheduled appointment (if applicable). Also provided is a quick link to "View all appointments" which will take you to the Appointments tab.
- Portal Forms – Any Portal Forms requested by Kindering that have yet to be completed will appear in this list. An option to "Edit form" is provided to take immediate action. The quick link to "View all portal Forms" will take you to the Documents tab and the Portal forms > "Incomplete" sub-tab.
- Clinical Forms – Any incomplete Clinical Forms signatures requested by Kindering will appear here. An option to "Sign" is provided to allow immediate view and signature. The "View all clinical forms" quick link will take you to the Documents tab and the Clinical forms > "Incomplete" sub-tab.
- Treatment Plans – Pending Treatment Plan signatures will appear in this section. The "View all treatment plans" quick link will transfer you to the Documents tab and the Treatment Plans > "Active" sub-tab.

d) i Help (D)

The Chat Bot feature is provided to assist you with your use of the Family Portal only. It will not be able to answer any questions specific to your care or Kindering policies and procedures. If you have questions about your care or need to speak with someone at

Kindering, please call and speak to us directly. As always, in an Emergency situation, please call 911 or visit your nearest emergency room.

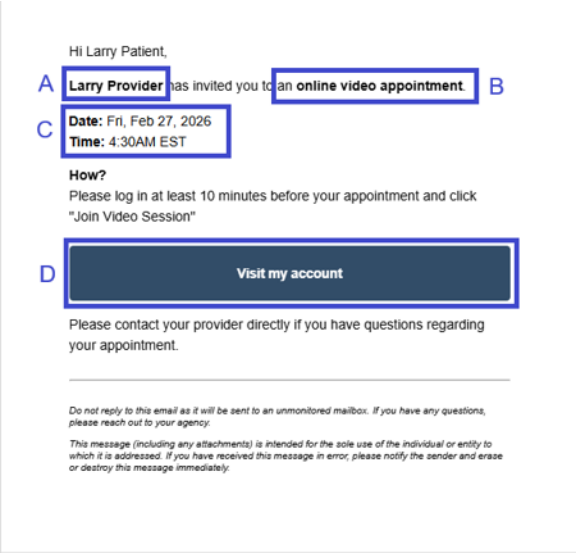
E. Appointments

a) Notification of New Appointment

Managing appointments with the Family Portal is initiated via notification to your preferred contact method (email or text). When an appointment is scheduled, you will receive a notification advising:

A. Which provider the appointment is scheduled with
B. Whether the appointment is in person or via online video (telehealth)
C. The Date and Time of the appointment

Additionally, a link to “Visit my account” (D) is provided for easy access to your Family Portal account.

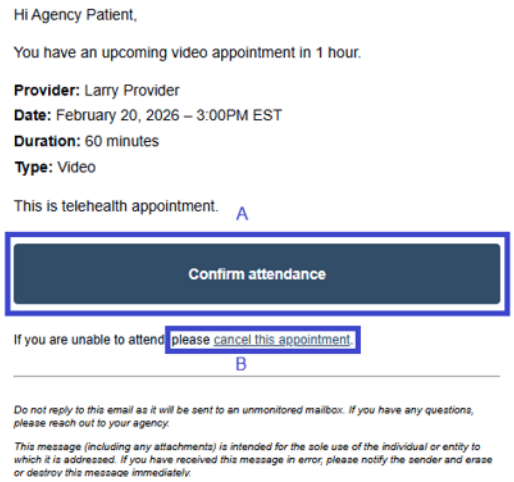


Within your Family Portal account, this and any other pending appointments will be visible on the Appointments tab (A) within the Upcoming sub-tab (B).

b) Reminders of Upcoming Appointments

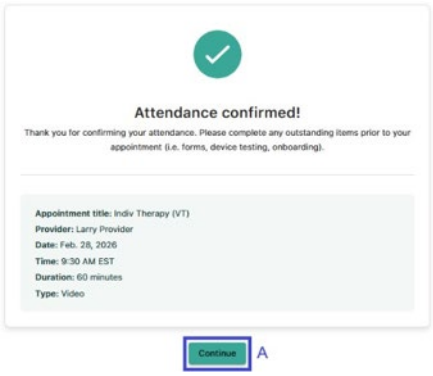
Kindering will send you, and any additional designated recipients, reminders ahead of most upcoming appointments at a pre-determined cadence. A typical cadence may be three days prior, one day prior and 1 hour prior to each upcoming appointment. As the reminders

draw nearer to the scheduled appointment, the 24 hour and 1 hour reminder will include clickable options to:



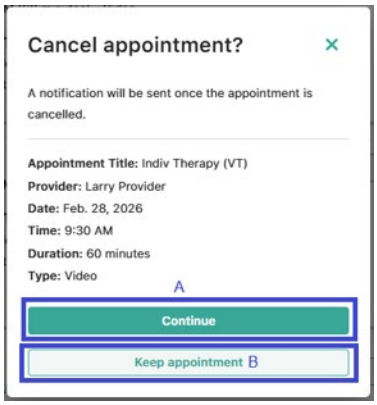
a) Confirm Attendance from Reminder

1. "Confirm attendance" is your way of alerting the office that you will be at the child's scheduled appointment. If this option is clicked, your response will be confirmed with an onscreen message. Clicking Continue (A) will route you to your portal account.

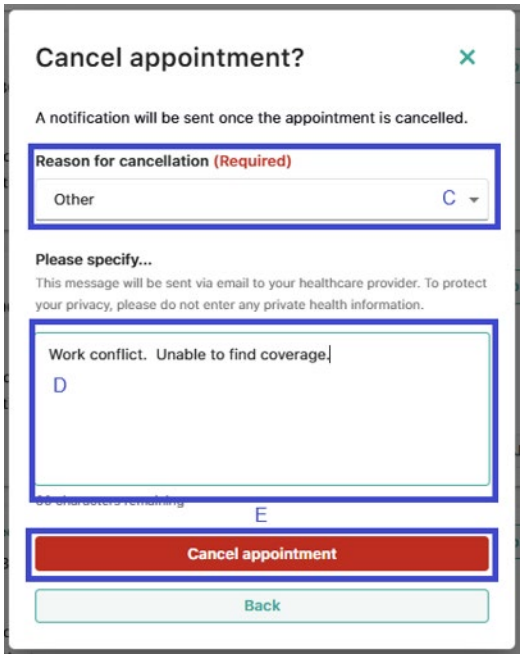


b) Cancel Appointment from Reminder

2. "Cancel this appointment" notifies Kindering that you will not attend, along with your reason for absence. Clicking this link will route you to the Portal where you will be asked to confirm your desire to Cancel the appointment by clicking "Continue" (A) or to "Keep appointment" (B) as scheduled. To proceed with the cancellation:
    a. Click the "Continue" (A) button.



b. Select a “Reason for cancellation” (C) from the dropdown provided. NOTE: If “Other” is selected, you will be prompted to enter your reason (D) in 100 characters or less.
c. Click “Cancel appointment” (E).



d. On update, your cancelled appointment will move into the Appointments tab “Past” sub-tab and indicate that it was a “Patient cancelled” appointment. This will also send notice to the Kindering electronic health record schedule and mark the appointment cancelled there as well. If Kindering has payment policies related to cancellations, you will be advised.

c) Appointment Updates

At times, Agency may initiate a change to your appointment due to conflicts with your provider or in response to a change request that you have made. When this occurs, you will receive a notification of the appointment and the update will reflect in your portal account Appointments tab in the “Upcoming” sub-tab.

Hi Larry Patient,

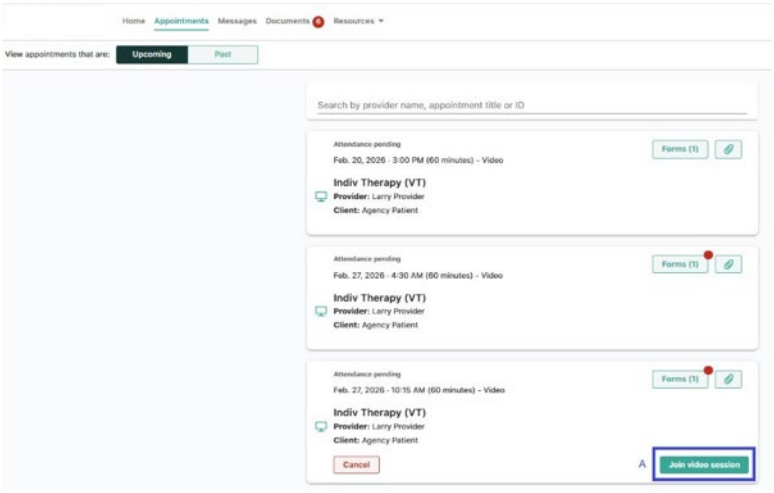
Your appointment on February 19, 2026 – 12:30PM EST has been updated. Please click here for more information.

Do not reply to this email as it will be sent to an unmonitored mailbox. If you have any questions, please reach out to your agency.

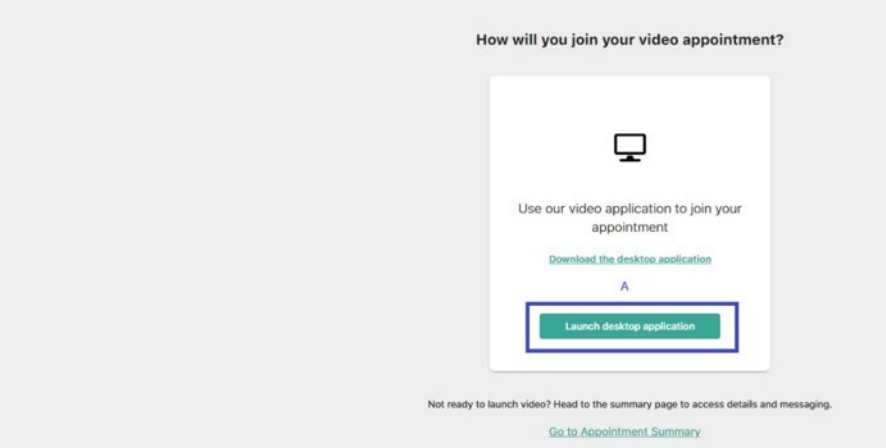
This message (including any attachments) is intended for the sole use of the individual or entity to which it is addressed. If you have received this message in error, please notify the sender and erase or destroy this message immediately.

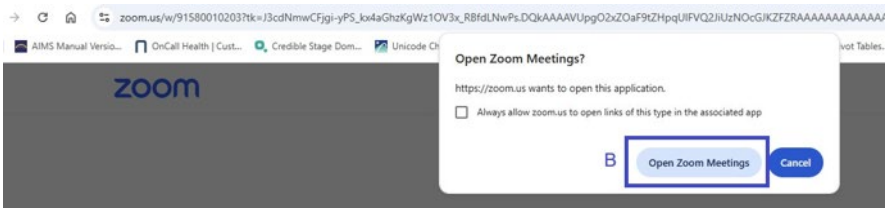
d) Joining Telehealth Session

When it is time to join a Telehealth (video) session, you must login to the Family Portal. The Zoom link that will connect you with your provider will become active for you to click and join the session 10 minutes prior to your scheduled meeting start time. The link will remain available to you until 10 minutes past the scheduled meeting end time. Please plan to login to the portal early in case there are forms requested for completion or other actions required before the session begins. When ready, click the “Join video session” (A) link within the appointment card. If the link is not able to be clicked, verify the time and that you are joining the session within the 10-minute starting buffer.\

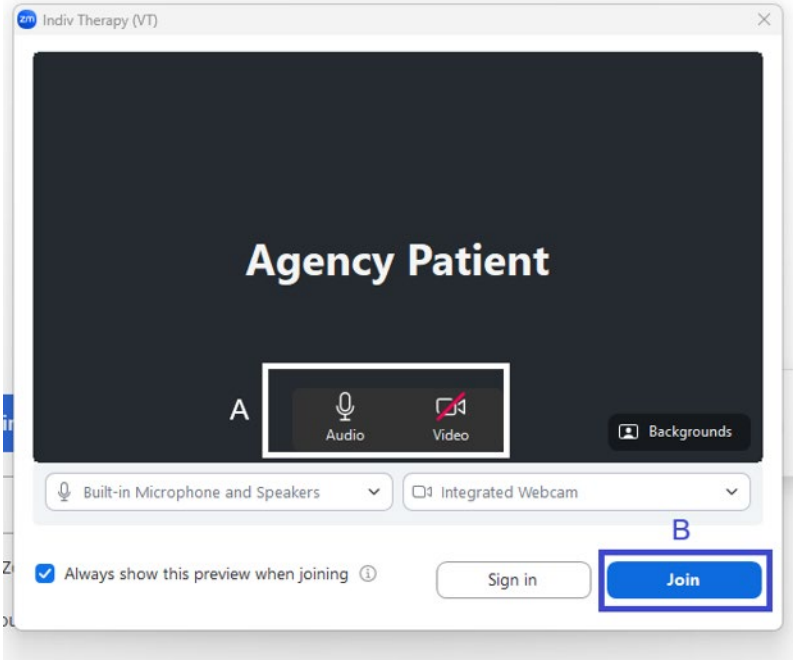


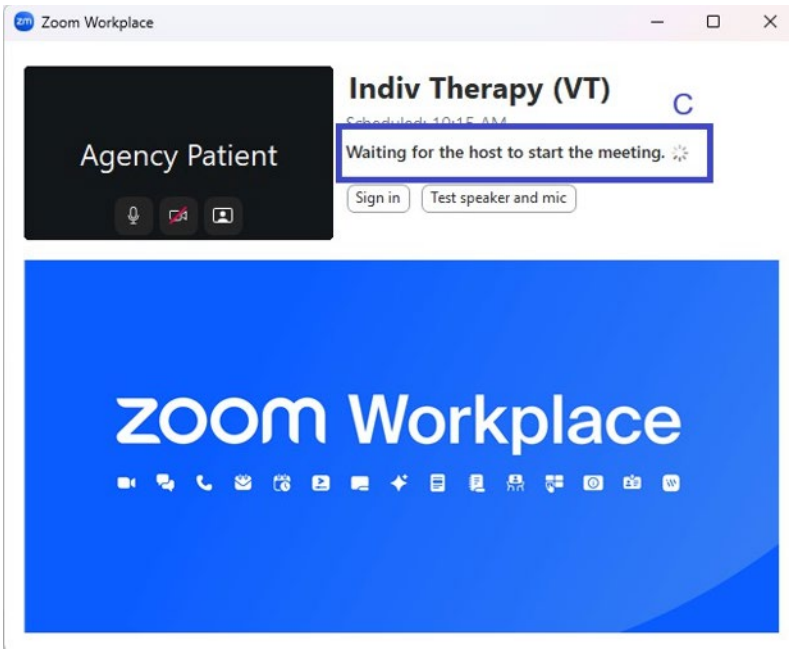
On click, the Zoom application will launch. Depending on your mode of entry, the application may launch automatically. If it does not, click the “Launch desktop application" (A) or similar option to engage. Zoom should then launch and may prompt you to “Open Zoom Meetings” (B). If it does, you will need to click to proceed.





Once Zoom loads, you will select whether to have your Microphone and/or Camera (A) on when you enter the meeting. Next, click the “Join” (B) button to enter the meeting Waiting Room (C). After the provider arrives to Zoom, you will be admitted and your session will begin.

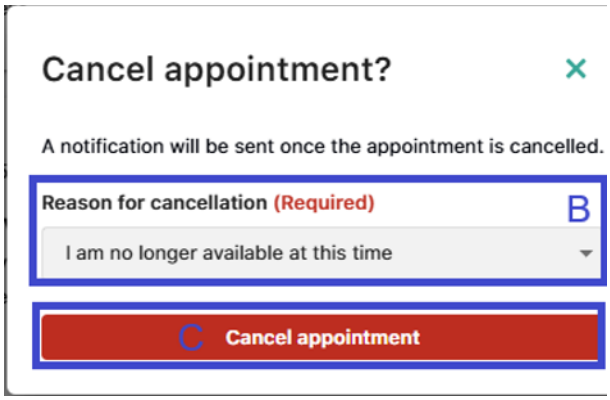




e) Cancel Appointment via Family Portal

In addition to the cancellation option that you have access to within the reminder notifications, an appointment cancellation may also be fulfilled within the portal directly. To do this:

1. Login to Family Portal
2. Click the “Appointments” tab
3. Within the “Upcoming” sub-tab, locate the appropriate appointment card
4. Click “Cancel” (A)
5. Select a “Reason for cancellation” (B) from the dropdown provided. NOTE: If “Other” is selected, you will be prompted to enter your reason in 100 characters or less.
6. Click “Cancel appointment” (C).



On update, your cancelled appointment will move into the Appointments tab "Past" sub-tab and indicate that it was a "Patient cancelled" appointment. This will also send notice to the Kindering electronic health record schedule and mark the appointment cancelled there as well. If Kindering has payment policies related to cancellations, you will be advised.

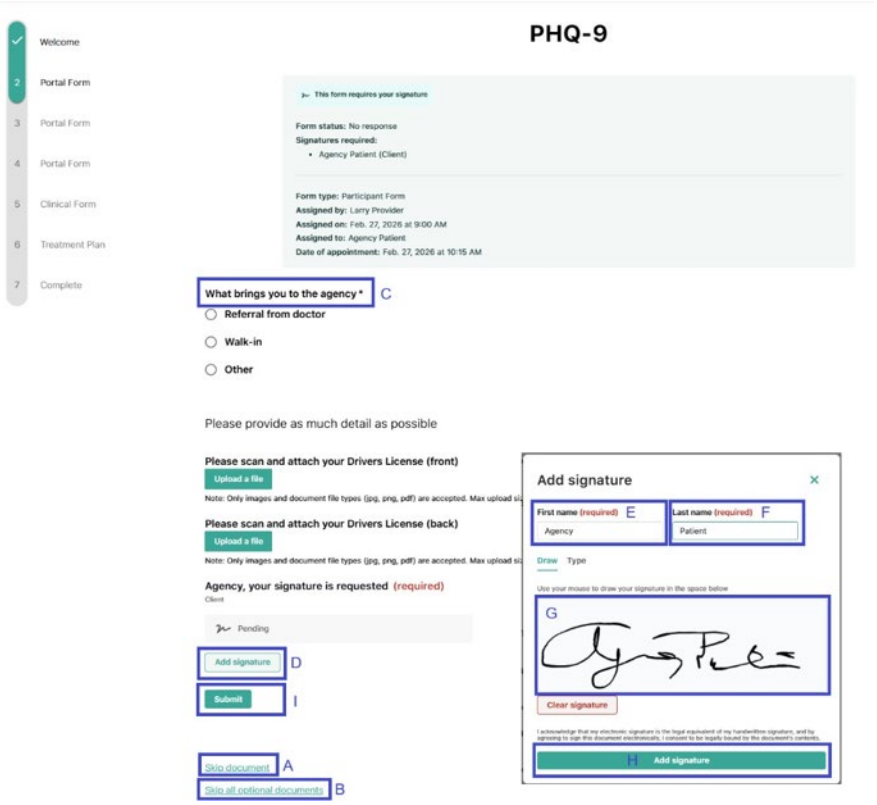
F. Action Item Requests at Login

Kindering may request actions from you at login to the Family Portal. Kindering may have configured these items in such a way that you have the ability to "Skip document" (A) or "Skip all optional documents" (B). If either of these options are selected, the next required item in the task list will then be presented to you for completion. Any skipped items that were not required will be visible in their respective Document tabs in your portal account. These should be completed as requested as soon as possible.

a) Portal Form Requests

Portal Forms requested at login are to be completed by responding to the questions presented in the form. If a question is required, there will be an asterisk (*) at the end of the question text (C). Once the form questions have been responded to:

1. At the bottom of the form, click "Add Signature" (D)
2. In the "Add Signature" box that appears, enter:
    a. First name (E)
    b. Last name (F)
    c. Using mouse/stylus, add a script signature (G)
3. After the signature has been entered, click "Add signature" (H) to apply
4. Click "Submit" (I)



This document, on completion and with signature (if required), will remain as a copy within your portal account. In addition, a copy of the completed and signed Portal Form will be returned to Kindering and into your electronic health record as a PDF formatted document.

b) Clinical Form Requests

Clinical Form requests are requests from Kindering for you and potential designated signatories to review and sign visit documentation that was completed in the electronic health record. Once you have reviewed the content of the document to be signed:

1. At the bottom of the form, click “Add Signature” (A)
2. In the “Add Signature” box that appears, enter:
    a. First name (E)
    b. Last name (F)
    c. Using mouse/stylus, add a script signature (G)
3. After the signature has been entered, click “Add signature” (H) to apply
4. Click “Submit” (I)

c) Treatment Plan Requests

Treatment Plan requests are requests from Kindering for you and potential designated signatories to review and sign your current Treatment Plan as defined in the electronic health record. Once you have reviewed the content of the treatment plan:

1. At the bottom of the form, click “Add Signature” (A)
2. In the “Add Signature” box that appears, enter:
    a. First name (E)
    b. Last name (F)
    c. Using mouse/stylus, add a script signature (G)
3. After the signature has been entered, click “Add signature” (H) to apply
4. Click “Submit” (I)

Once all Action Items have been attended to or skipped, click “All done” (A) to proceed onward to the Home tab.

G. Documents Tab

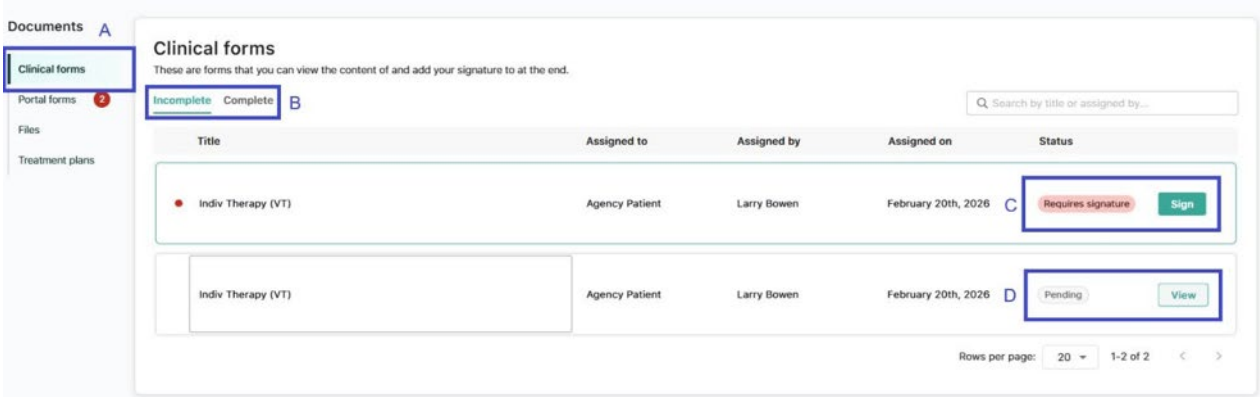
The Documents tab contains four sub-folders. Each has similar structure and purpose. This tab is where all Clinical forms, Portal forms, Files (Portal Only), and Treatment plans are housed for reference and for completion of requested actions that may have been skipped during the login process or assigned during your current portal session.

a) Clinical Forms

The Clinical Forms subfolder (A) is structured as follows:

- Incomplete or Complete (B). The Complete list will contain Clinical forms that have obtained all signatures and the corresponding visit documentation in the electronic medical record has been approved by Kindering. The Incomplete list contains any Clinical forms that are still awaiting signature or Kindering approval.
- Status will show:
    - "Requires Signature" (C) with a corresponding button to "Sign" which will open the Clinical form to view and apply signature
    - "Pending" (D) with a corresponding button to "View" which will open the Clinical form in view only mode

Once signatures have been applied and the corresponding visit documentation in the electronic medical record has been approved by Kindering, the status will change to "Completed" and the Clinical form will be visible within the "Complete" list. Each tab also contains a "Search by title or assigned by" field for ease of document retrieval.



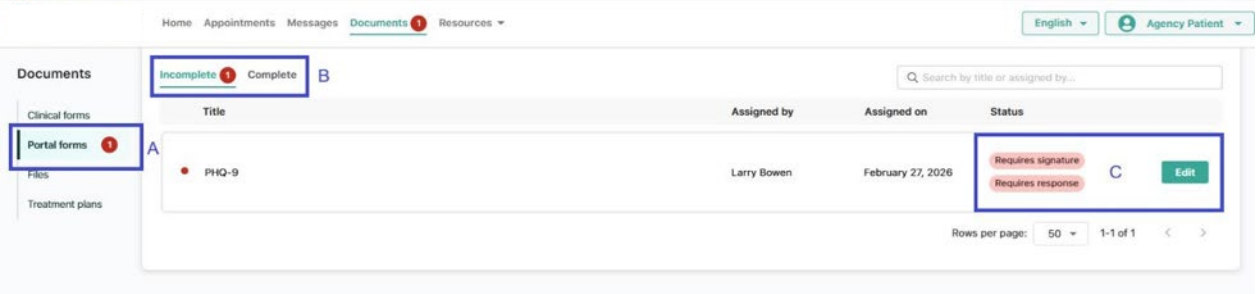
b) Portal Forms

The Portal Forms subfolder (A) is structured as follows:

- Incomplete or Complete (B). The Complete list will contain Portal forms that have all signatures and have been submitted to Kindering. The Incomplete list contains any Portal forms that are still awaiting your completion and signature or perhaps the signature of the Provider (if applicable).
- Status will show:
    - "Requires Signature" (C) with a corresponding button to "Edit" which will open the Portal form for completion and to apply signature

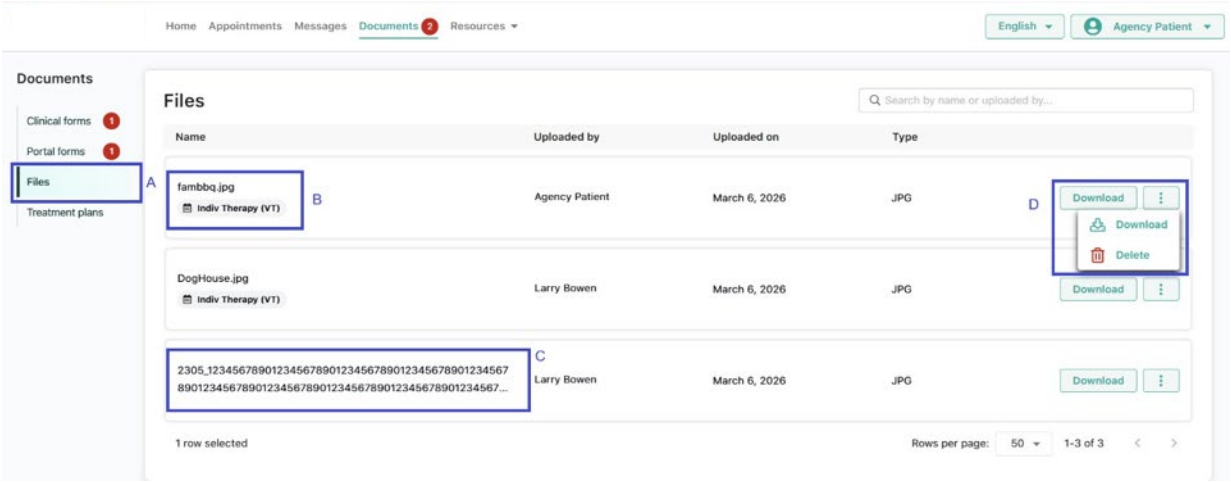
Once the Portal form has been completed, signed and submitted to Kindering, the status will change to "Completed" and the Portal form will be visible within the "Complete" list.

Within the Complete list, you will have the ability to Print and/or View the Portal forms. Each tab also contains a “Search by title or assigned by” field for ease of document retrieval.



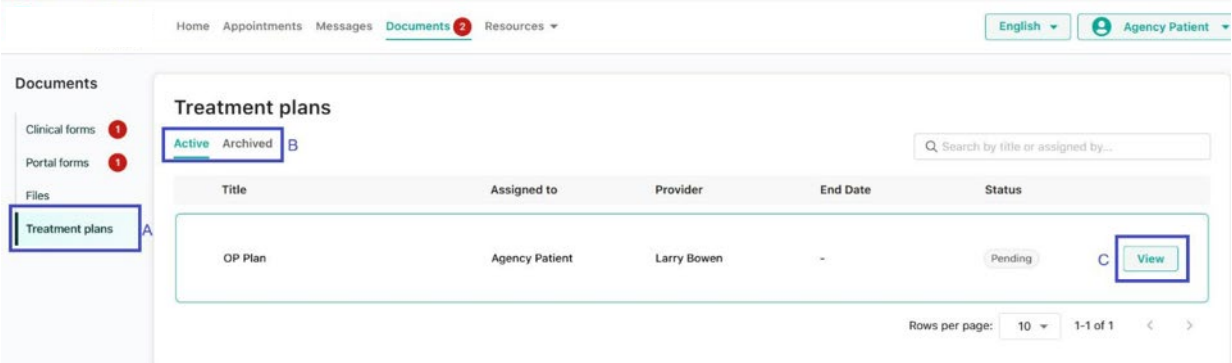
c) *Files*

The Files subfolder (A) contains files that have been uploaded for inclusion in the Portal by Kindering for your viewing and/or files that you have attached to an appointment for Kindering staff. Within the “Name” column, those files that have a name accompanied by a Service reference (B) were uploaded in conjunction with an appointment. Those that were uploaded by Kindering directly as a file, will appear as a name only (C). Files that you have uploaded will have the option to “Download” and “Delete” (D) within the ellipsis menu. Files provided to you from Kindering will only have the “Download” option.



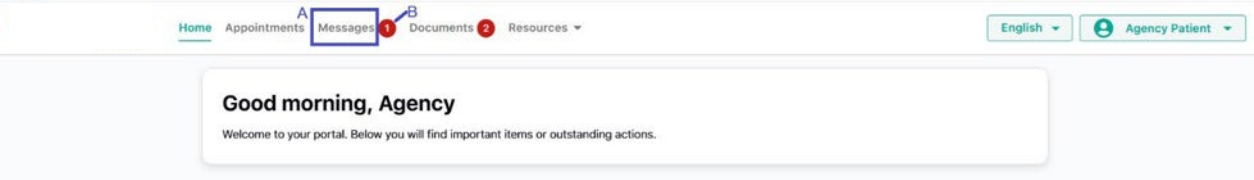
d) *Treatment Plans*

The Treatment Plans subfolder (A) is structured with two tabs: Active and Archived (B). The Active list contains Treatment Plans currently in use by Kindering in alignment with the child’s care. If a signature is required, the “Status” column will prompt for signature. The “View” button (C) provides read-only access to the child’s treatment plan details. The Archived list houses Treatment Plans that have expired or are no longer actively in use.



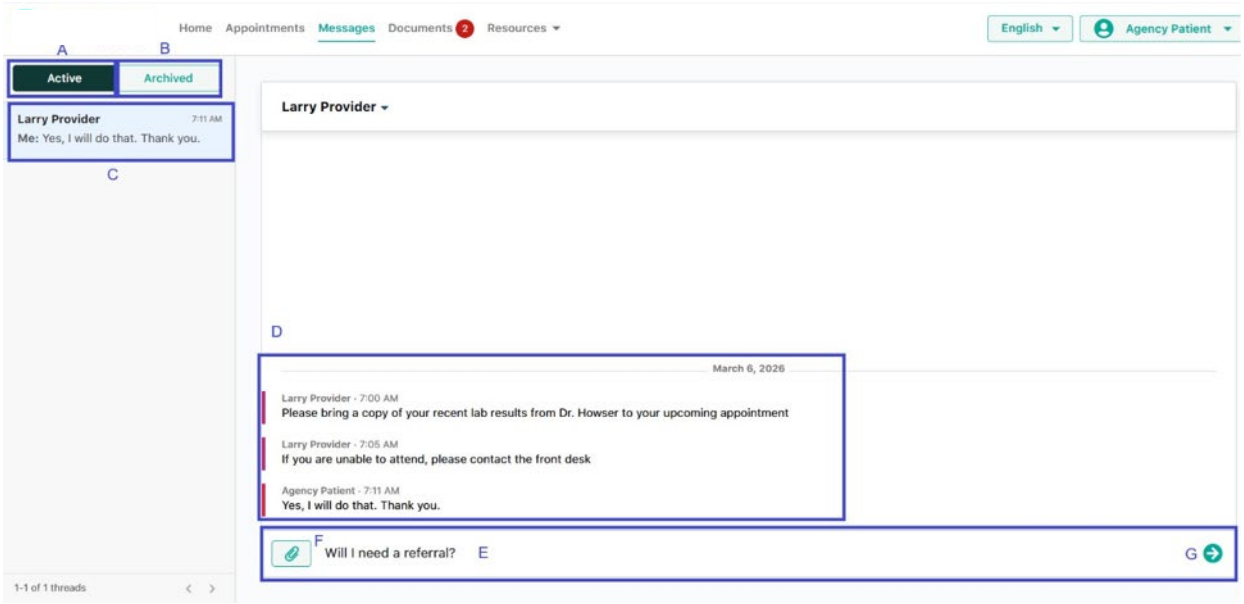
H. Messages

Messaging within the Family Portal can only be initiated by Kindering staff. Once Kindering has initiated a messaging appointment, you may communicate via the “Messages” tab (A) which will display an alert (B) if any messages are pending your attention.



The Messages tab consists of two sub-tabs:

- The Active (A) tab houses any current conversations that are still available for response to Kindering.
- The Archived (B) tab contains prior conversations that Kindering has marked as “Ended”. Only Kindering staff may conclude a conversation. Once a conversation is ended, you will not be able to reply or initiate a new conversation with Kindering.



To engage in conversation:

1. Select the desired Active conversation (C)
2. Review the prior correspondence (D)
3. Enter the message to be sent to Kindering (E). If desired, a file may be attached to the conversation using the paperclip icon (F). On upload, the attachment will also be archived in the "Files" sub-tab within the "Documents" tab.
4. Once the message is complete, click the green arrow to send (G).

I. Resources

The Resources tab is where Kindering supplies links to additional online materials, agencies, documents or other materials that may aid in the child's developmental support journey.