Token Process

The instructions below are for clients that are actively enrolled and have an EFS MOD account, but either DO NOT have a Family Portal Account or cannot access their Family Portal account. Both of these examples below are for clients that directly pulled up in EFS MOD. If a client is brand-new or an inactive client that did not migrate over, then the below does not apply to them.

- For families WITH a Family Portal that cannot access their Family Portal account under this highlighted section:
  - Instruct clients to log into Family Portal using the above email address as their username.
  - If a client does not remember their password, they may use the “forgot password” option.
  - If a client would like for the Family Portal username to be changed, please add it to the EFS Ticket Tracker.

- For families WITHOUT a Family Portal account
  - If a family does not have a Family Portal Account, please DO NOT have them create a Family Portal account on their own. Please complete the below Token Process. This process will directly link them to the appropriate EFS MOD file. If they do it on their own, this will create a duplicate account.
    - Click on the “Update Account” button. A window will pop up asking you to enter in the client’s email. Please type in the client’s email address in the box.
    - The client will then get an email in order to complete the process on their side and confirm the email address.
    - Once they successfully complete the process, the email address entered in will then appear under “Family Portal Account,” and the client will have access to their EFS MOD account.
    - If an error message pops up stating the email is already in use, the client has accidentally already created a duplicate account. Please add this to the EFS Ticket Tracker.