senior portal™

Senior Portal User's Guide
for
Ingleside at Rock Creek

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Introduction

Senior Portal - Building Communities. Connecting Residents.

What does that mean, exactly?

Senior Portal is an intranet solution built for, and under the guidance of, seniors and senior living community staff. We have meticulously worked with residents, executive directors, gerontologists and web usability experts to craft a system that works *for* you. Senior Portal helps residents learn more about their community, and it helps staff do their jobs more effectively.

A few things you should know:

- Senior Portal is a secure, private intranet system built specifically for your community. Only those with verified usernames and passwords (residents and select staff) have access to the portal.

- You can access the Senior Portal on any device, anywhere in the world! Desktop, laptop, tablet, eBooks, smartphones, etc.-- as long as you have access to the Internet, you're a few clicks away from the digital pulse of your community.

- The Senior Portal operates on a constant feedback loop, so whether a resident signs up for events or submits a form, you will be emailed a confirmation, as will the staff members associated with your registrations or requests. You can always unsubscribe from these email notifications at any time.
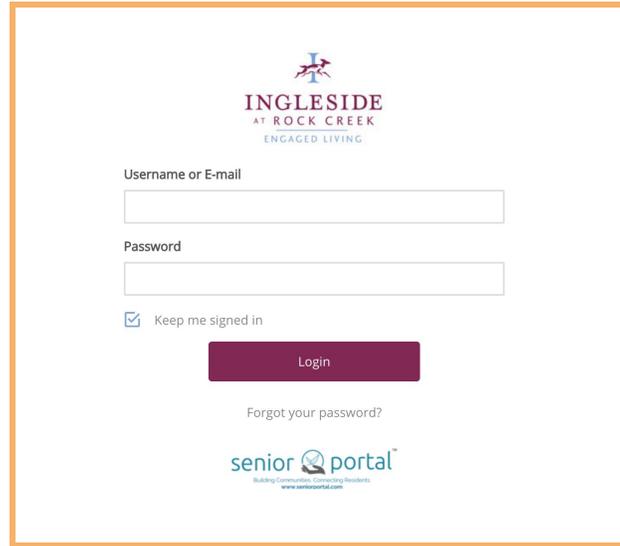
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We hope this guide will help you learn how to manage your digital community! For any questions, please don't hesitate to reach out to the Senior Portal team at hello@seniorportal.com or call 919-903-9274.

Logging In

You will be able to access your community's Senior Portal on any device with an Internet connection.

If you live at **Ingleside at Rock Creek**, visit: **https://inglesideliving.org/irc/. Once you click "LOG IN"** You will see a login screen, pictured below.

If this is your first time visiting your Senior Portal, you will be given a username and password so you may login. **Please contact your community's administration if you do not know your username or are experiencing trouble logging in.**

By selecting the "Keep me signed in" box you will not have to login next time you visit the portal unless you manually log out. This option is not recommended for public computers.
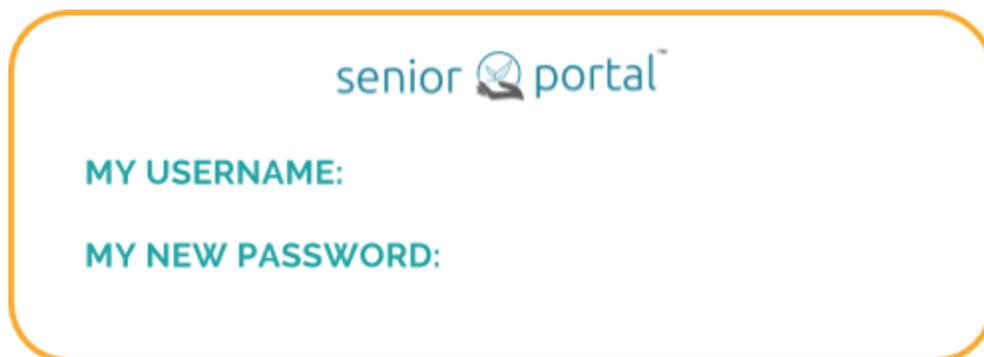
Fill in the box to remind yourself of your login details later!

Navigating the Portal

Though the portal is designed for ease of use, it may take some time to get accustomed to all its features and where everything resides. We've outlined the top navigation bar and explained what you can do related to each tab below:

- Home - Ingleside and Rock Creek Logo
    - Once clicked, returns you to the home screen. The home page features weather, time, announcements, additional navigation options, form statuses, event statuses, and more.

- Events
    - My Events - Manage your event RSVPS - cancel event sign ups
    - Register Now - Sign up for events, view event attendees
    - Digital Calendar - View events in a calendar layout, sign up for events
    - Weekly Calendar (PDF)

- Dining
    - About Dining
    - My Dining - Manage your dinner RSVPs - cancel dining reservations
    - Dining Menu
    - Make Reservations - Make dinner reservations
    - To-do and Delivery Order
    - Dining Comment Form

- Forms
    - My Forms - Check your form confirmations and form status: in one glimpse, get access to all the forms you submitted and see their status
    - Transportation Request
    - Housekeeping Form
    - Maintenance Request
    - Away Form
    - Guest Room Reservation
    - Volunteer Hours
    - Dining Comment
    - Request for Keys and Passes
    - Sharps container request

- Services
    - Independant Living(PDF)
    - Assisted Living (PDF)
    - Health Care Center (PDF)
    - Fitness & Wellness (PDF)

- ○ Memory Care (PDF)
- ○ Social Worker Services (PDF)
- ○ Spiritual Life (PDF)

- ● Directories
  - ○ Resident Directory - Search residents and shared interests
  - ○ Staff Directory - Search for staff members in the Staff Directory

- ● News and Social
  - ○ Monthly Newsletter (PDF)
  - ○ CEO Updates (PDF)
  - ○ COO Chats (PDF)
  - ○ Directors Dialogs (PDF)
  - ○ Construction Updates (PDF)
  - ○ Resident Handbook (PDF)
  - ○ Tv Guide (PDF)

- ● Resident Council
  - ○ About Resident Council (PDF)
  - ○ About Committees (PDF)
  - ○ Art Studio (PDF)
  - ○ Budget & Finance (PDF)
  - ○ By-Laws/Legislative (PDF)
  - ○ Communications/Publicity (PDF)
  - ○ Decorating (PDF)
  - ○ Development (PDF)
  - ○ Food & Dining (PDF)
  - ○ Friendly Visitors (PDF)
  - ○ Green/Environmental (PDF)
  - ○ Health & Wellness (PDF)
  - ○ Hospitality (PDF)
  - ○ Library (PDF)
  - ○ Marketing (PDF)
  - ○ Politics & Prose (PDF)
  - ○ Program (PDF)
  - ○ Speakers (PDF)

- ● Help
  - ○ Training Videos
  - ○ User Guide (PDF) - Access your copy of the Portal User Manual
  - ○ FAQ

Events

Registering for Events

Once you are logged in, you can register for events and activities through Senior Portal. You can access the register events page one of two ways:

1. From any page, scroll to the top of the page and hover over the "Events" tab within the navigation menu. From here, select "Register for Events" from the dropdown menu.

or

2. From the homepage, scroll down and select the button that says "Events".

You will be redirected to a page that shows all of the open events. Click "Register" on the event you would like to sign up for.

Once you fill out the registration form with your contact information and number of tickets, click "Submit." Upon clicking Submit, you will be officially signed up for the event.

Canceling an Event

If you wish to cancel an event, hover your mouse over "Events", then click on "My Events". You will be redirected to page where you will see the events you are currently signed up for. To the left of the event, you will see a checkbox. Click on the checkbox of the event, then click "Cancel Registration."

	Event Name	Date	Check-in Time	Booked ticket
☑	Senior Portal 101	June 14, 2016	10:00 am	1

Showing 1 to 1 of 1 entries   First Previous 1 Next Last

To cancel an event, please select the checkbox next to an event you wish to cancel and then click the button below. You may cancel multiple events at once.

Note: You can not cancel closed events.

☐ **Check All**

Cancel Registration

Interactive Events Calendar

Want to know what activities are coming up? We display your print calendars on Senior Portal, but we also have an interactive calendar to make discovery even easier. Under the "Events" tab, select "Interactive Events Calendar" from the dropdown menu, or scroll down on the homepage and click "Calendar."

From here, you'll be able to view all available events within your community at a single glance. You can sort these options by a daily, weekly, or monthly view.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31 Container Gardening With Bland Landscaping 1:00 pm	1	2	3	4 Earth Day Farmer's Market Dinner 6:00 pm
5	**Senior Portal 101** Come and learn how to navigate through the new resident Check In Time: 10:00 am Available Spaces: unlimited **Register Now**		8	9	10	11 NC Symphony: Beethoven's Violin Concerto 5:30 pm
12			15	16	17	18
19			22	23	24	25
26	27	28	29	30	1	2

When you find an event that interests you, simply hover over it with your cursor. You will see additional information on that event, including a short description, the check-in time and how many spaces are available for registration.

Dining

Make and Cancel Reservations

In order to make a reservation, hover over "Dining" in the navigation menu and select "Make Reservations." Your information should automatically populate based on your profile information. Follow the prompts to complete your request.

View Menus

To view dining menus, hover over or click the Dining tab and select from the dropdown menu which you'd like to view. Each menu will open in a new window, and you have the option to download or print these menus at your convenience!

You can access the menus by one of two ways:

1. From any page, go to the top navigation bar and hover over the "Dining" tab and select the menu you wish to see.

or

2. From the homepage, scroll down and select the button that says "Dining".

Services

How to Submit a Form

There are many types of forms to be found in Senior Portal, and if there's a new type of form that is needed, speak to staff members and we can add it in. The following are forms you currently have access to:

- Transportation Request
- Housekeeping Form
- Maintenance Request
- Away Form
- Guest Room Reservation
- Volunteer Hours
- Dining Comment
- Request for Keys and Passes
- Sharps container request

You may access the forms from any page by hovering over the "Forms" tab in the navigation menu. To view a form, select the form name and click. You may also locate forms on the homepage by clicking on the button that says "Forms."

Let's say you wish to fill out a Transport Request form. Simply navigate to the "Forms" option and select "Transport Request" Fill out the form and select the "Submit" button. You will receive an email confirmation of your request.

Your service request or form will be forwarded the appropriate department. For forms requiring approval, the associated department will update the status of your request to either approved or denied. You will receive an email confirmation either way.

Checking Form Status

When you submit a service request form, you can check the status of your submission easily by navigating to the homepage or by going to the top navigation bar and hovering over "Forms" and selecting "Conformations and Form Status."

My Forms

Form Name	Date	Submitted Status	View Form
Housekeeping Form	Apr 7, 2016	Pending	Click Here
Dining Reservation Form	Apr 7, 2016	Pending	Click Here

You can print this page by clicking on the printer icon above the list of your submitted forms.

On this page, you'll find the type of form(s) you submitted, the submission date, and its status. Staff will update the status of your request at their earliest availability. If your status is approved, it will change color to **green**. If there is an issue with your request, the color will change to **red**. Forms that have yet to be confirmed or denied will be listed as "Pending." If you would like to view a previously submitted form, click on "Click Here" for the appropriate form.
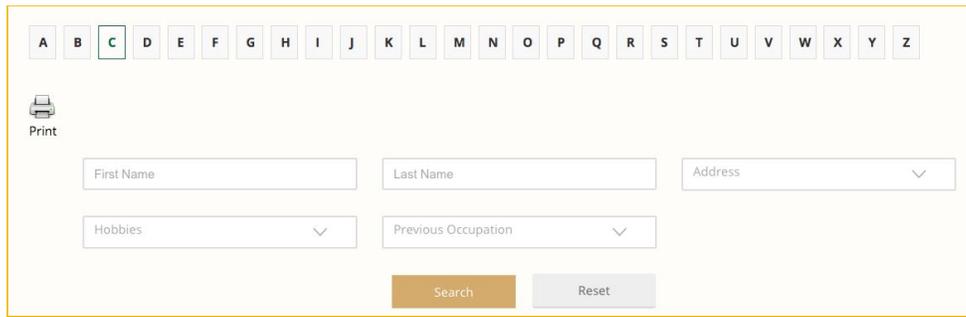
News & Directories

Search the Resident Directory

Navigate to "Directories" from the top navigation bar and select "Resident Directory." You will then be presented with your community's photo directory.

You may also access the directory from the portal homepage by clicking the "Resident & Staff Directories" icon, then clicking on "Resident Directory."

As you scroll down, you'll see your friends and neighbors sorted in alphabetical order. But let's say you wish to find someone specific. At the top of the page, you have many options:

You can sort by last name by clicking the letter corresponding to their last name. You can search by first name, last name, address, hobbies, and previous occupation! Our results will be shown when you make a selection and click "Search." Please note you do not have to click "Search" when you click the letters for last name.

Search the Staff Directory

Navigate to "Directories" from the top navigation bar and select "Staff Directory." You will then be presented with your community staff directory! You may also access the directory from the portal homepage by clicking the "Resident & Staff Directories" icon, then clicking on "Staff Directory."

As you scroll down on the Staff Directory page, you'll see your community staff profiles and contact information as alphabetical order. But let's say you wish to find someone specific. Enter their name in the search bar, then click "Search."

You may also filter the community staff profiles by their department. You may do so by clicking the department name, then you will see all of the profiles of staff members who work in that department. If you are accessing the portal on a mobile phone or other VOIP-enabled device, you may select the staff member's phone number and call them directly from your device.

Documents

Portal Help and Training

Need to see how something is done? We've created a few training videos for you to review. Simply use the top bar to navigate to "Documents" and then "Portal Help and Training."

You may also access these videos from your homepage by scrolling down and clicking the "Help and Training" icon.

On this page you'll see the available training videos, as well as a downloadable Resident User Manual. To view or download the manual, click on "View User Manual."

Community Documents

The "News and Social" and the "resident Council" tab in the main navigation menu have a repository of important information for your viewing convenience. Each item in the drop down menu will open in a new tab. In most cases, the information will display within your browser, with the option to save, download, or print the document.

To access any of these documents, hover your mouse of the tab. You will see a drop down menu appear with all of the documents. To view the documents, click on title and you will be redirected to that specific page.
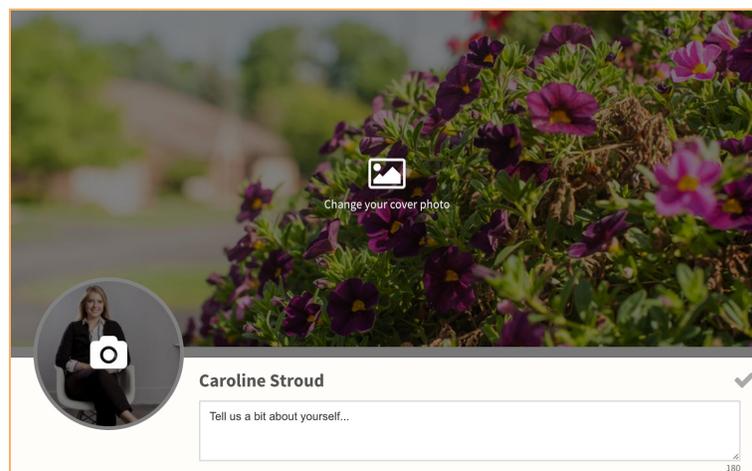
Your Account

Edit Your Resident Profile

Do you go by a nickname, or is your phone number incorrect? Want to update to your profile photo? No worries! You can edit your personal profile by hovering over your profile picture on the top right corner of the portal. You will see a drop down menu appear - click on "View Profile."
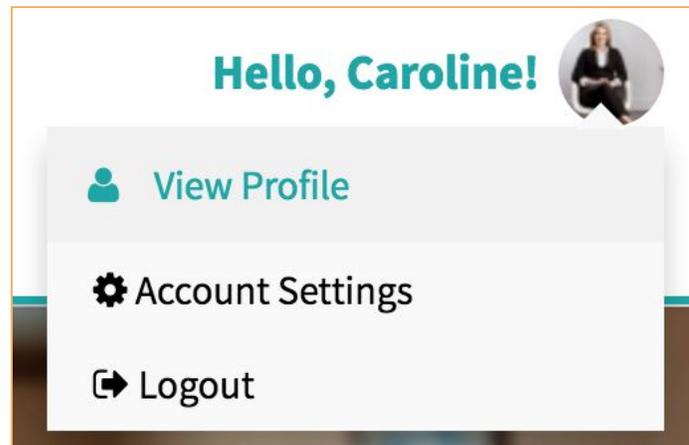
You'll see a screen with a large background image and a smaller profile image. You can easily change both by simply clicking the icons and uploading a new photo.

Scrolling down on this page allows you to update your name, address information, and other details. Please note than an email address is required to use the portal.

Password and Privacy Settings

In order to manage and update your Account Settings, such as changing your password or email address, hover over your profile picture on the top right corner of the portal. You will see a drop down menu appear - click on "Account Settings"

You will be redirected to your account profile. You will see a list of menu items to the left of the screen, right underneath your profile picture. Below is an overview of what each menu item entails:
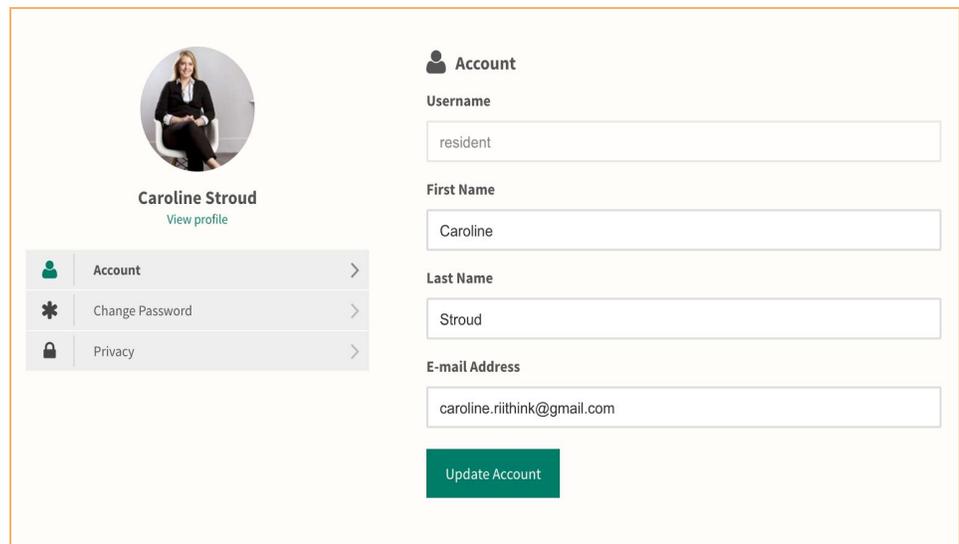
Account
Allows you to change your name and email address,

Change Password
Allows you to change your password.

Privacy options,
Allows you to opt-out of the Resident Directory.

Logging Out of Your Account

If you would like to logout of your account, hover your mouse over your profile picture found on the upper right hand corner. You will see a drop down menu appear - click "Logout."