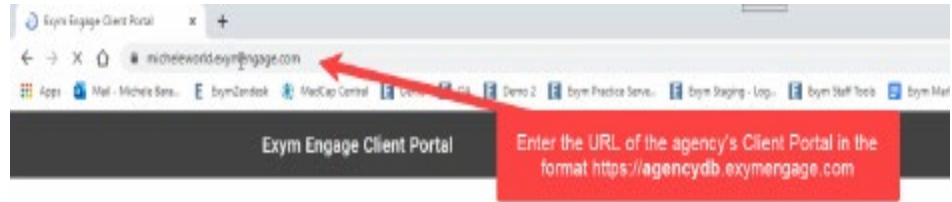


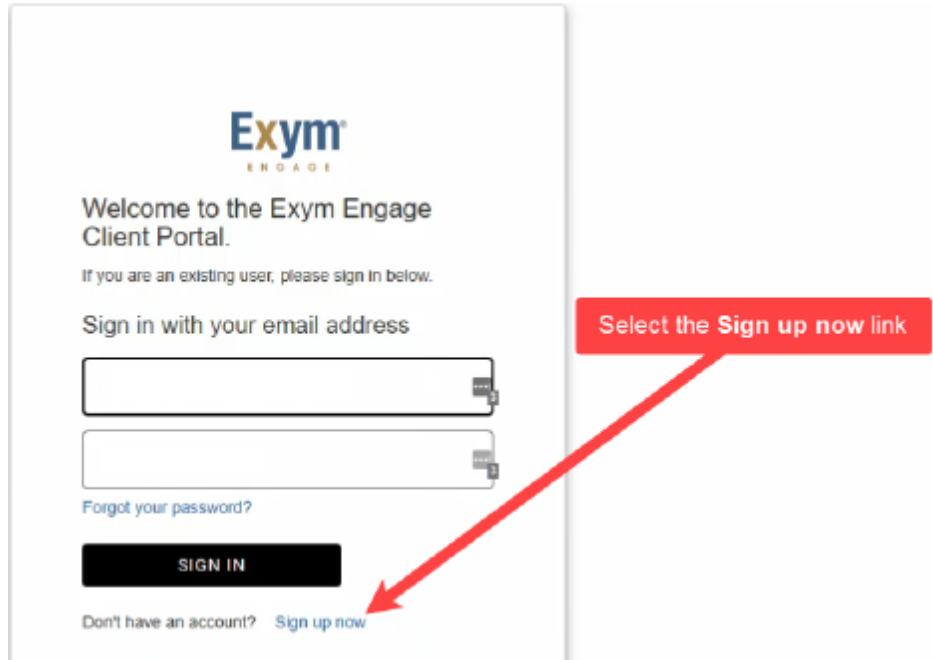
Clients and their contacts must create an account in the Client Portal before they can access their records and sign forms electronically.

To create a Client Portal account:

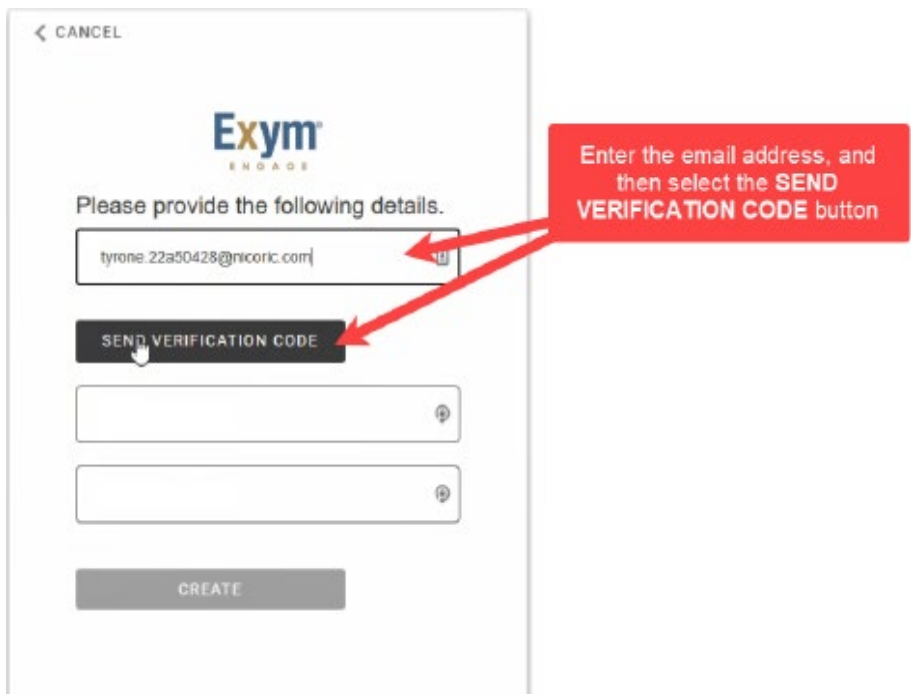
1. Enter the following URL in a browser:
<https://cfg.exymengage.com>
or visit agency website at:
<https://www/cfgcenter.com>
for Client Portal link.



2. Select the **Sign up now** link.



3. Enter the email address you gave to the client's provider and then select the **SEND verification code** button.



Note: Check email for a code to verify the email account. If code is not received within a few minutes, check your junk and spam email folder.

4. Enter the code received via email and then select the **VERIFY CODE** button.

Enter the verification code received via email, and then select the **VERIFY CODE** button

5. Enter a password and verify it by entering it again in the second password field.

6. Select the **CREATE** button.

Enter a password, verify it by entering it in the second password field, and then select the **CREATE** button

7. Select the **SEND VERIFICATION CODE** button.

Note: Check email for a code

< CANCEL

Exym
ENGAGE

Please provide the following details.
Verification is necessary. Please click Send button.

Email Address

*****@nicoric.com

SEND VERIFICATION CODE

CONTINUE

Select the **SEND VERIFICATION CODE** button

8. Enter the verification code in the verification code field <and then select the **VERIFY CODE** button.

< CANCEL

Exym
ENGAGE

Please provide the following details.
Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

*****@nicoric.com

Verification code

934135

VERIFY CODE

SEND NEW CODE

CONTINUE

Enter the verification code and select the **VERIFY CODE** button

9. Select the **CONTINUE** button to log in.

< CANCEL

Exym
ENGAGE

Please provide the following details.
E-mail address verified. You can now continue.

Email Address

*****@nicoric.com

CONTINUE

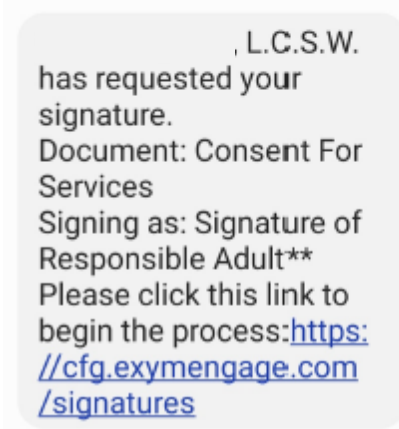
Select the **CONTINUE** button to login

To log into the Client Portal:

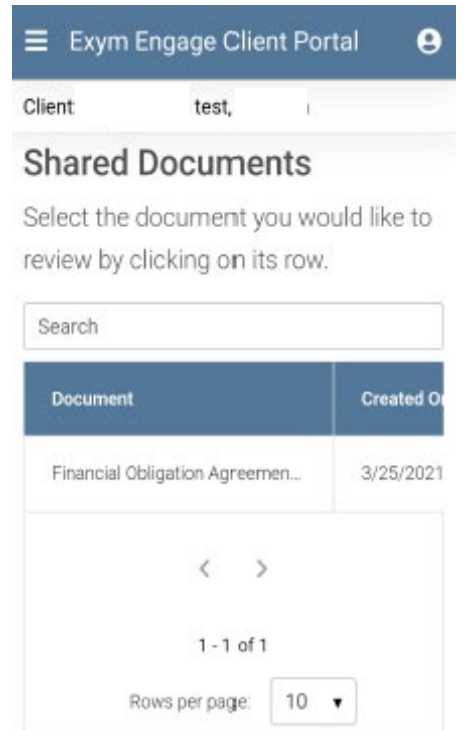
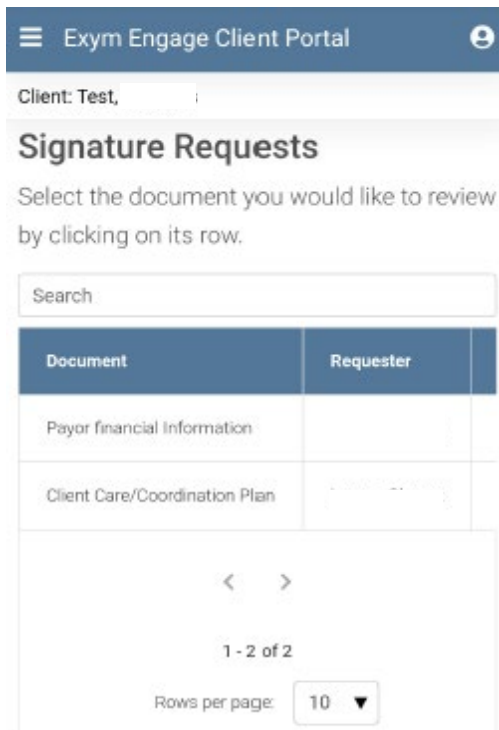
1. Enter the following URL in a browser: <https://cfg.exymengage.com> or visit agency website at: <https://www.cfgcenter.com> for Client Portal link.
2. Enter the email address and password.
3. Select the **SEND VERIFICATION CODE** button. Check email for a verification code.
4. Enter the verification code in the Verification code field and then select the **VERIFY CODE** button.
5. Select the **CONTINUE** button to login.

To electronically sign documents:

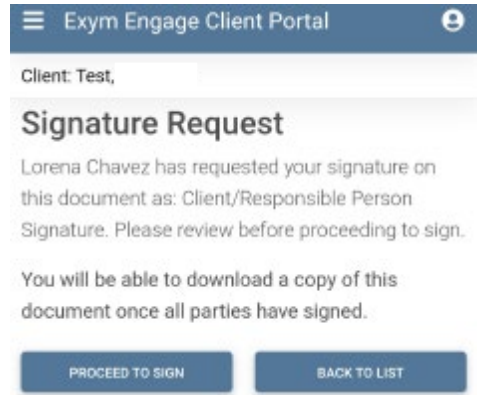
1. Click on the link received via email or text message and you will be taken directly to the portal.



2. Log into the portal and you will see a Signature Request or Shared Documents. If there is more than one document to sign, click on one to proceed.

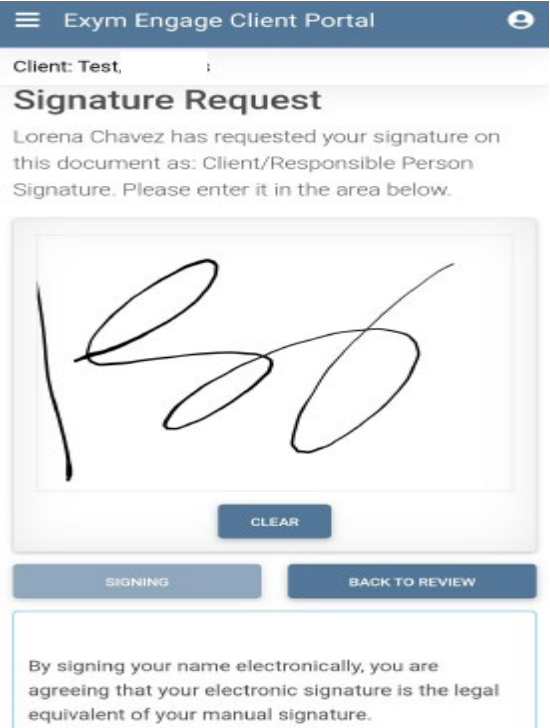


3. On the next screen, click “proceed to sign.”



4. In the blank area on the screen, enter your signature and click the “sign” button when complete.

Note: If you are using touch screen device, tablet, or phone, you can sign using your finger or a stylus pen. If you are using a desktop computer or laptop, sign using your mouse.



5. You will see a confirmation once your signature has been added to the document. Your provider will be notified that you signed the document.

