Complete Guide to the Client Portal

GETTING STARTED GUIDE

The Client Portal

with simplepractice

The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your appointment fees.

SECTIONS:

HOW DO I LOG IN?

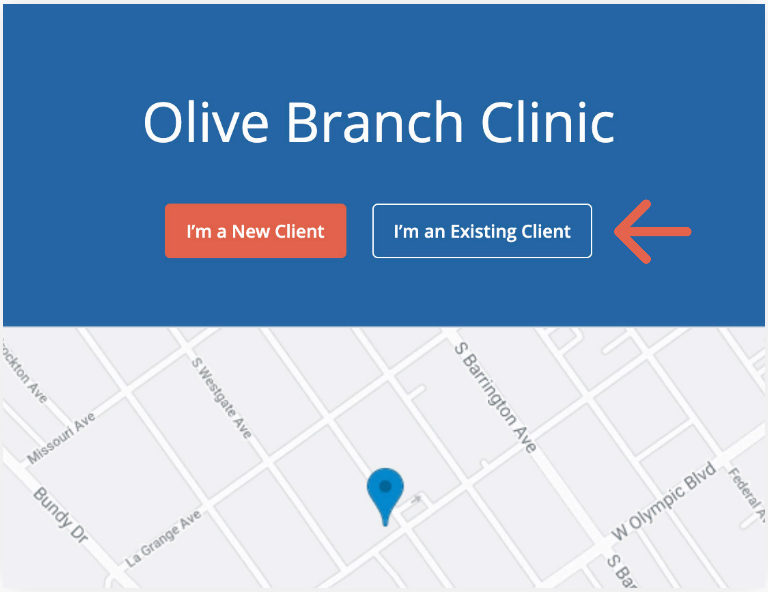
The first time that you log in to the Client Portal, click the link found in the welcome email you received from your clinician. Clicking the link will open a new tab in your browser where you'll automatically get logged in.

Hi Emily,

Before we meet, I would like you to review my practice documents and provide some information about yourself. This will help us get started. Please follow instructions to log in and let me know in case you need assistance.

Thank you!

Click here to login to the client portal

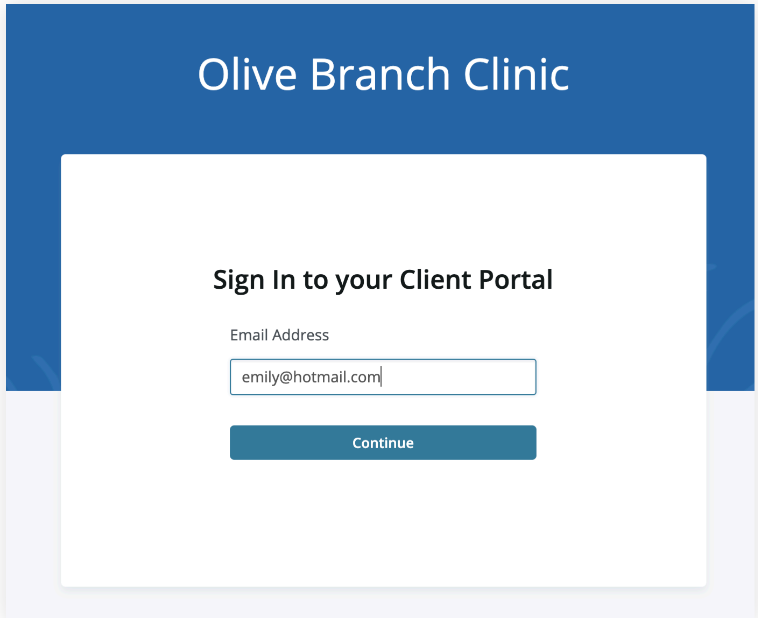


To log back in:

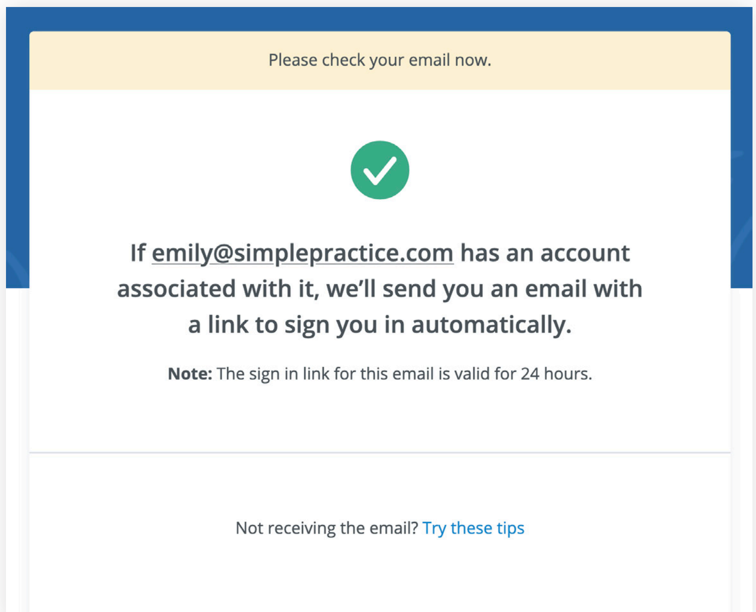
1. Go to your clinician's **Client Portal website**.
2. Click the **I'm an Existing Client** button.

Tip: Bookmark this page so you can log back in easily in the future.

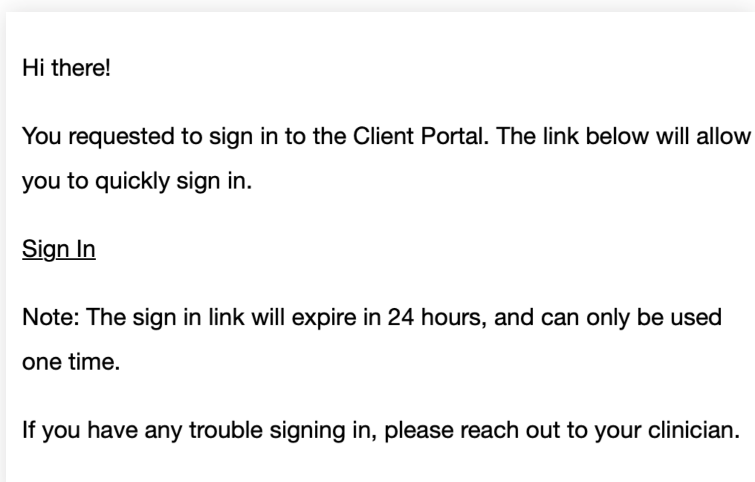
3. Enter the **email address associated with your account**. You'll receive an **email with a link** to log into your Client Portal.



4. You'll see this message that asks you to check your email. If you're not receiving the email, you can click **Try these tips** for troubleshooting.



5. Click the **Sign In** link from the email to automatically log into your Client Portal. It expires after 24 hours and can only be used to log in one time.



Hi there!

You requested to sign in to the Client Portal. The link below will allow you to quickly sign in.

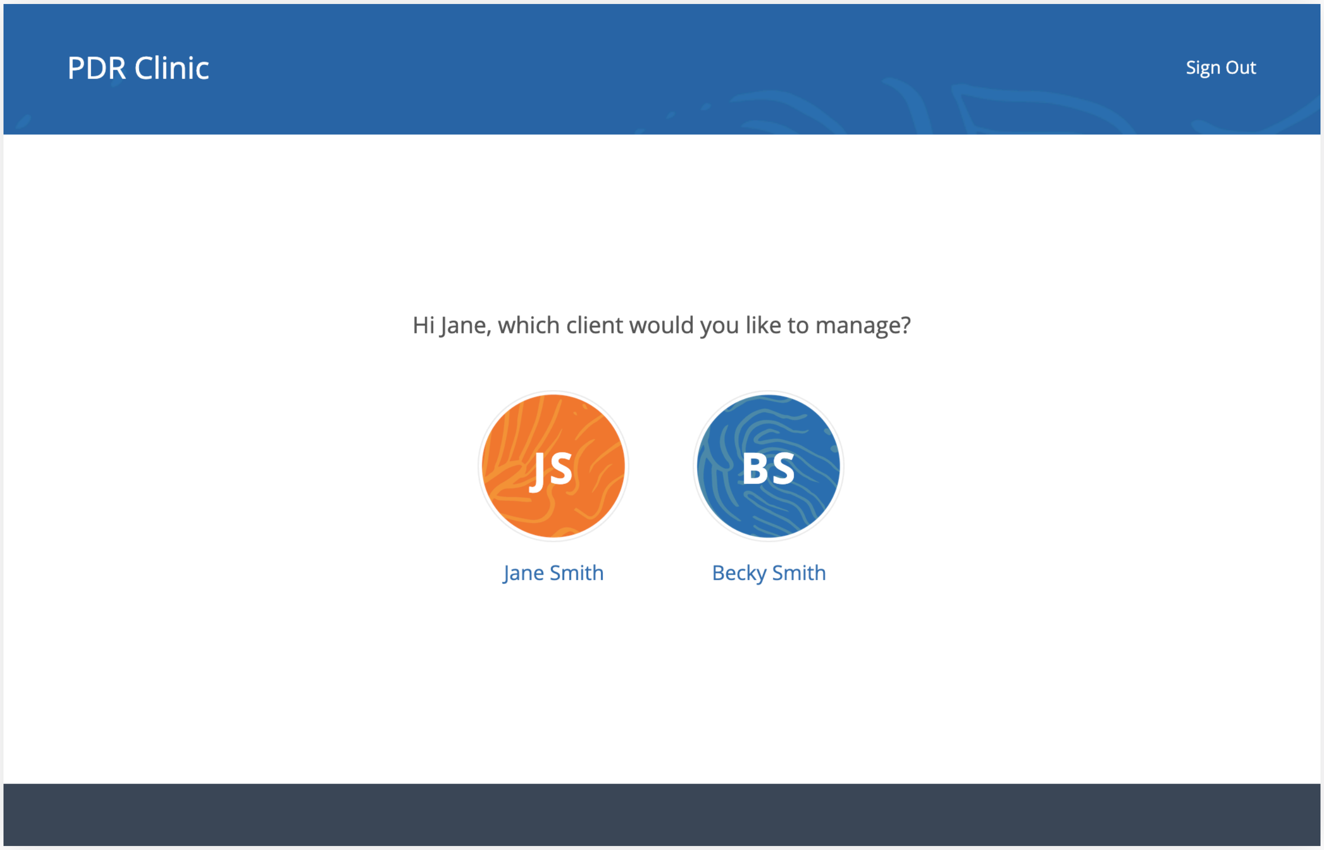
Sign In

Note: The sign in link will expire in 24 hours, and can only be used one time.

If you have any trouble signing in, please reach out to your clinician.

MINORS MANAGEMENT

If your clinician is seeing both you and a minor client(s) you're the guardian for, they can give you Client Portal access for both profiles. If that's the case, you'll see multiple icons upon logging in so you can select the profile you want to manage.



TROUBLESHOOTING

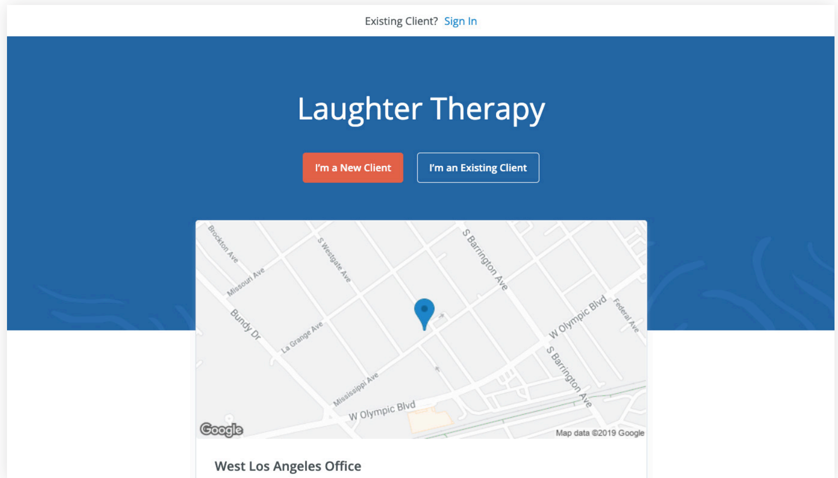
1. Check your **spam folder** and any other folders in your inbox for an email from the address no-reply@simplepractice.com. You can also add this address to your address book to make delivery easier.
2. Be mindful of any **auto-fillers** enabled in your browser that might be entering information for you. If the auto-filler replaces the information you type, your email address will be entered incorrectly.
3. Double-check your **spelling**. Your login credential for access will be your exact email address—the same one where the invitation is delivered—so all spelling must be correct.
4. The same email can't be used for more than one portal account for the same clinician. Be sure to use the same email address that you normally use to log into your Client Portal.

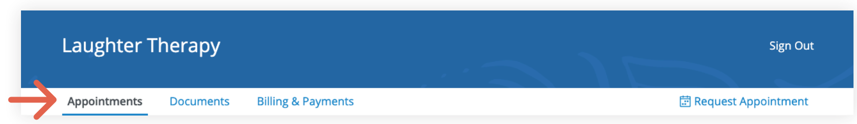
ONLINE BOOKING

Online Booking lets you **request**, **cancel**, or **reschedule appointments** with your clinician. After submitting your request, you'll get a **confirmation email** once your clinician approves the appointment. If they are not able to see you at that time, they will send you a different email, which will let you request another time.

To request appointments through the Client Portal:

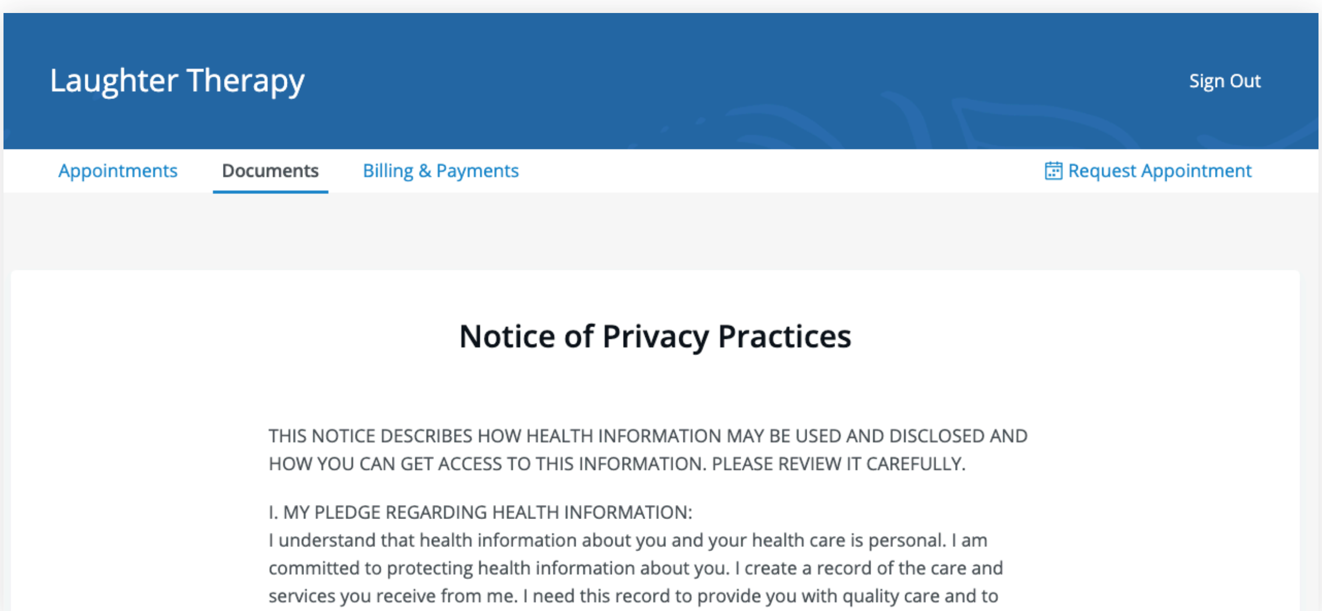
1. Go to your clinician's Client Portal and click **I'm an Existing Client** to log in. The **I'm a New Client** button is only for clients who have never logged into the Client Portal before.
2. Navigate to the appointments tab. This may already be selected by default after you log in.



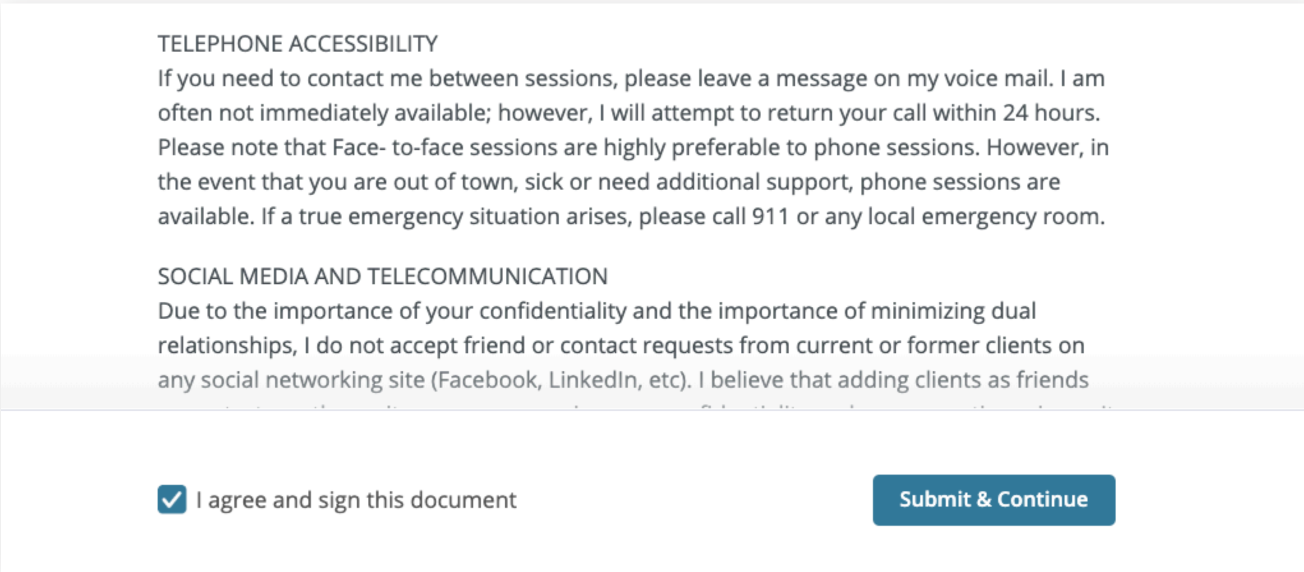


DOCUMENTS AND FORMS

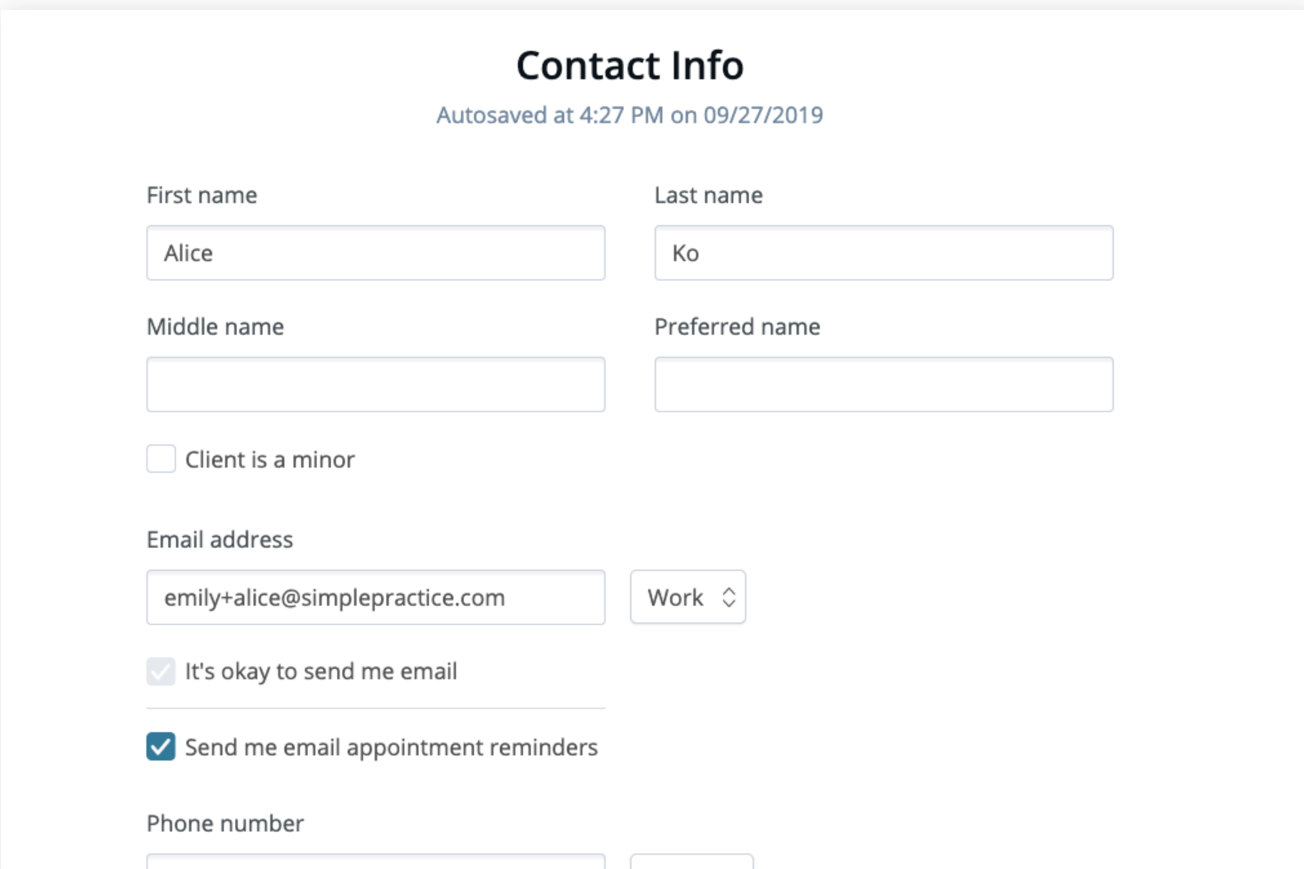
The first time you log into the Client Portal, you'll see a welcome message from your clinician. After you click **Get Started**, you'll begin completing forms for your clinician.



Some documents can be signed electronically by clicking the **checkbox** at the end of the bottom of the page. Then, click **Continue** to move to the next document.

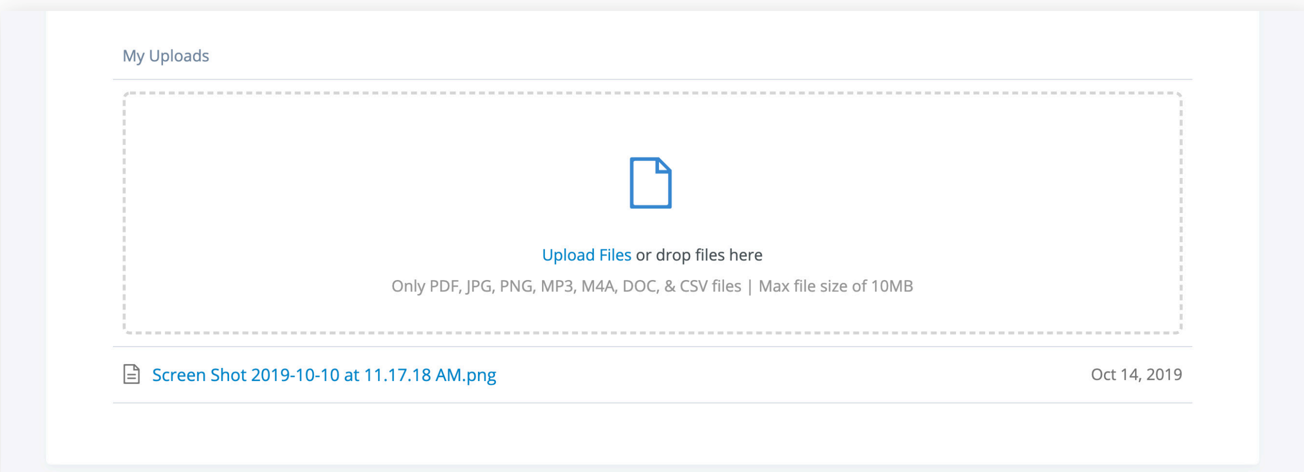


After signing documents, you may be asked to fill out your contact details, demographics, credit card, and insurance information.



To view documents that your clinician has shared with you, view the **Documents** tab.

At the bottom of the **Documents** tab, you will be able to upload files to share with your clinician, including pdf, jpg, png, mp3, m4a, or csv files. You can click to view these at any time.



Congratulations!

You're now ready to start using your Client Portal.

GETTING STARTED GUIDE

Secure Messaging

with simplepractice

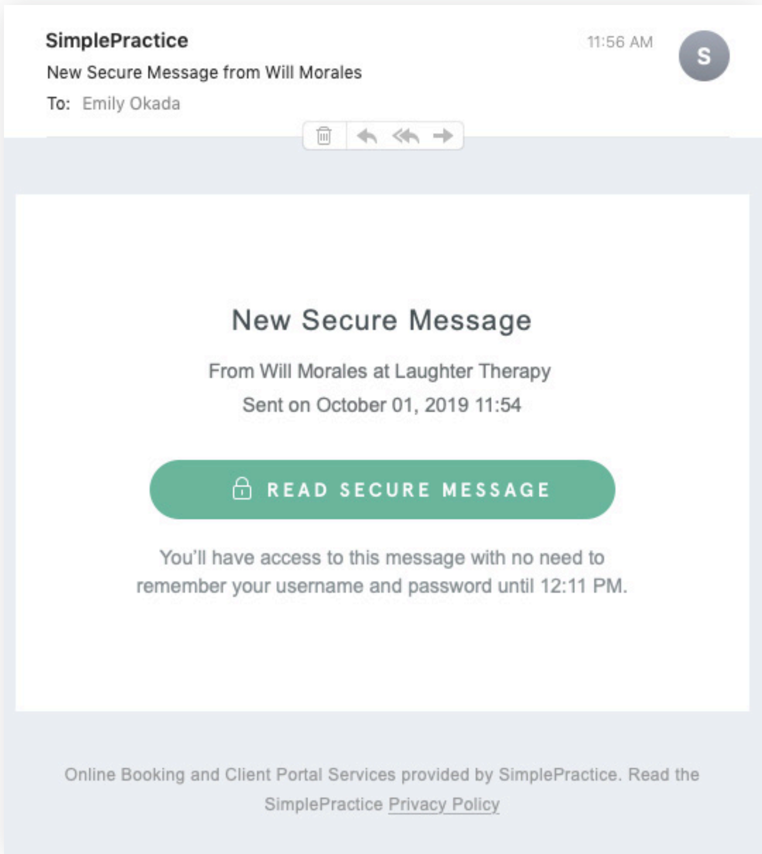
Secure Messaging lets you message your clinician directly. Reschedule your session or ask a question straight from your phone.

SECTIONS:

MESSAGE NOTIFICATIONS

When your clinician sends you a secure message, you'll receive an email that looks like this:

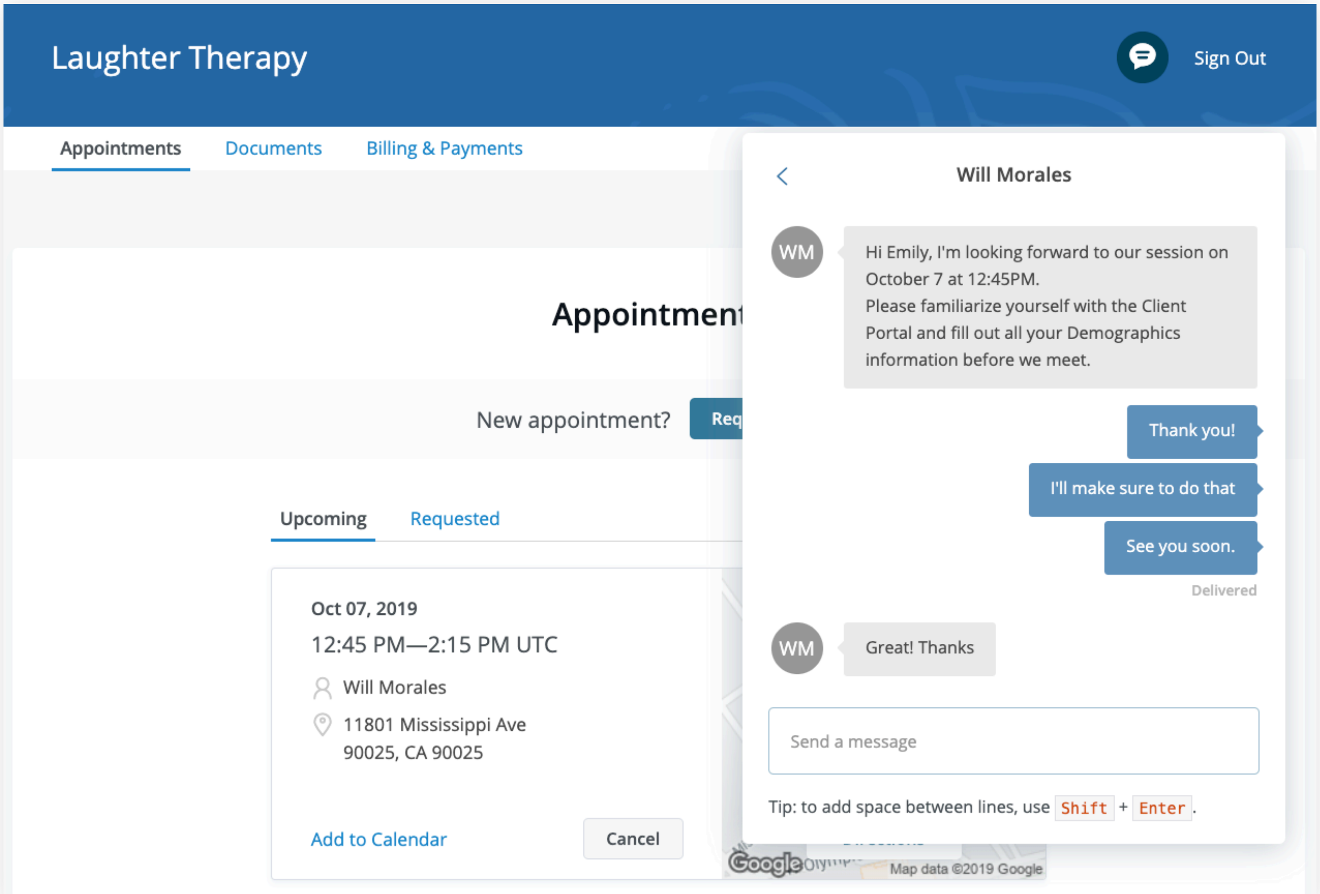
1. Click the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**. You can then view and reply to messages directly from there. This works the same way whether you're on your computer or your mobile device.



NOTE: After 15 minutes pass from when you receive the email, you'll have to log in to view your message through the Sign In link you'll receive via email.

HOW TO REPLY

Start typing your message in the box that says **Send a message**, then hit enter (or return) on your keyboard when you're ready.



You can check your messages or send new ones at any time by logging into the Client Portal. Once you log into the portal, just click the **Secure Message icon** to view your message. The **orange dot** indicates a new message is waiting.

Congratulations!

You're now ready to start using Secure Messaging.

GETTING STARTED GUIDE

How to Request Appointments

with simplepractice

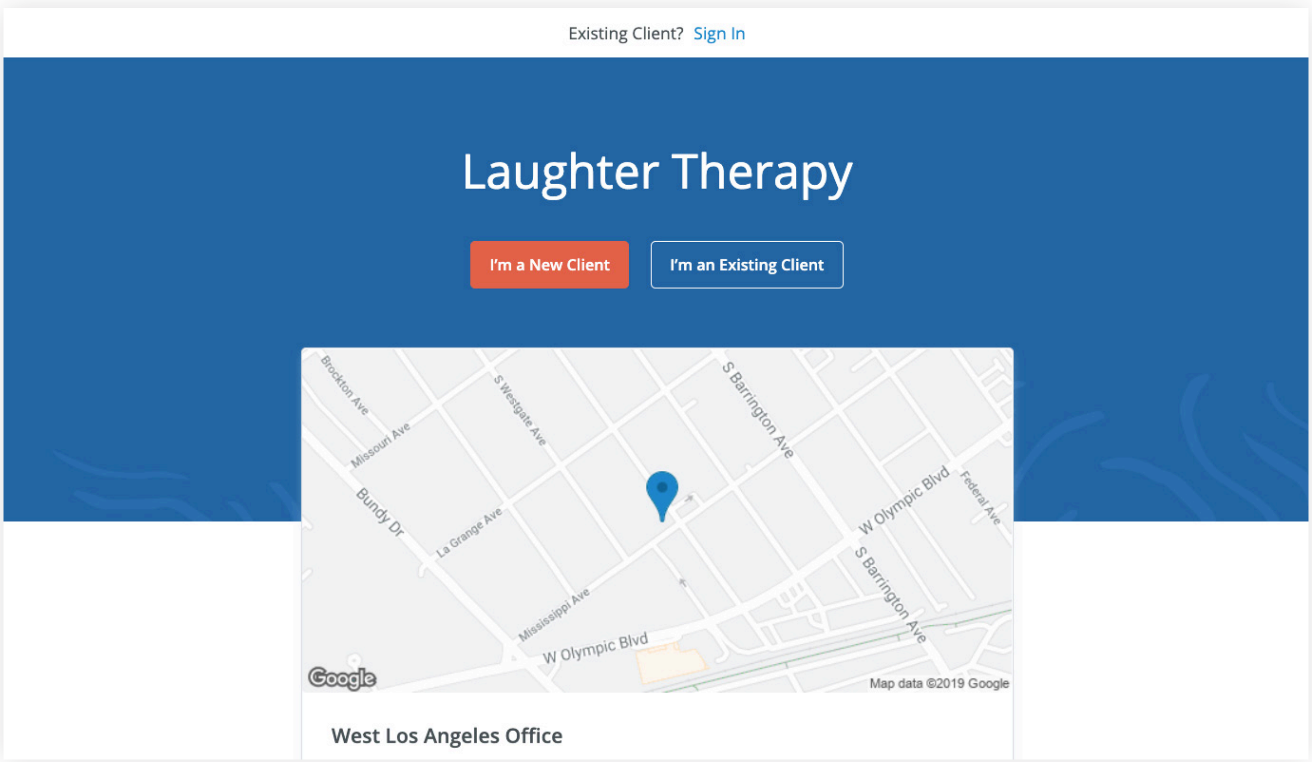
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

SECTIONS:

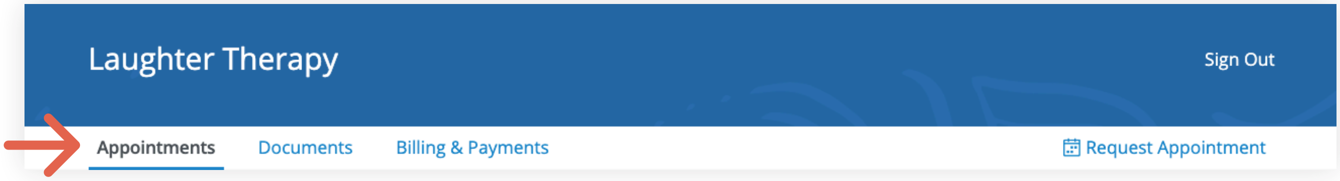
1. Request an appointments
2. Cancelling requests

REQUEST AN APPOINTMENT

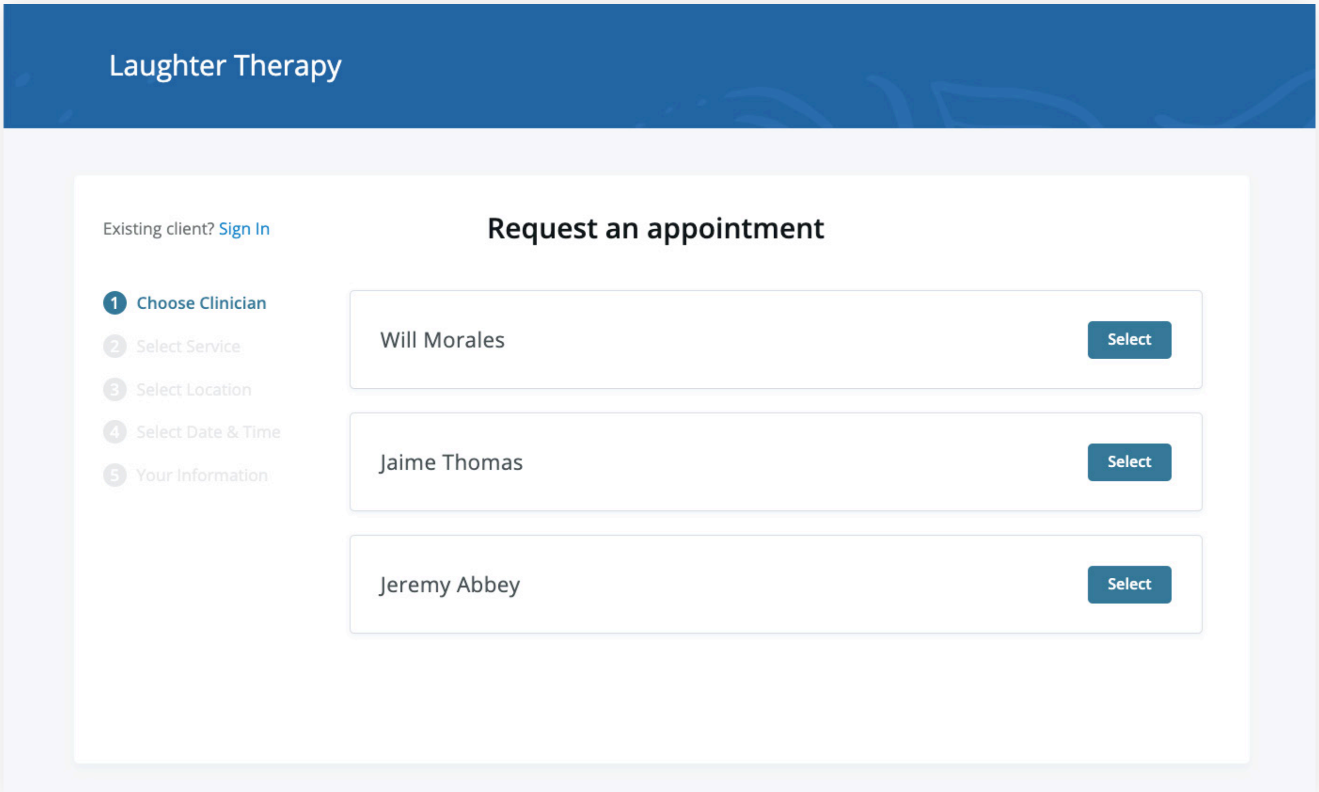
1. Go to your clinician's Client Portal and click **I'm an Existing Client** to log in. The **I'm a New Client** button is only for clients who have never logged into the Client Portal.



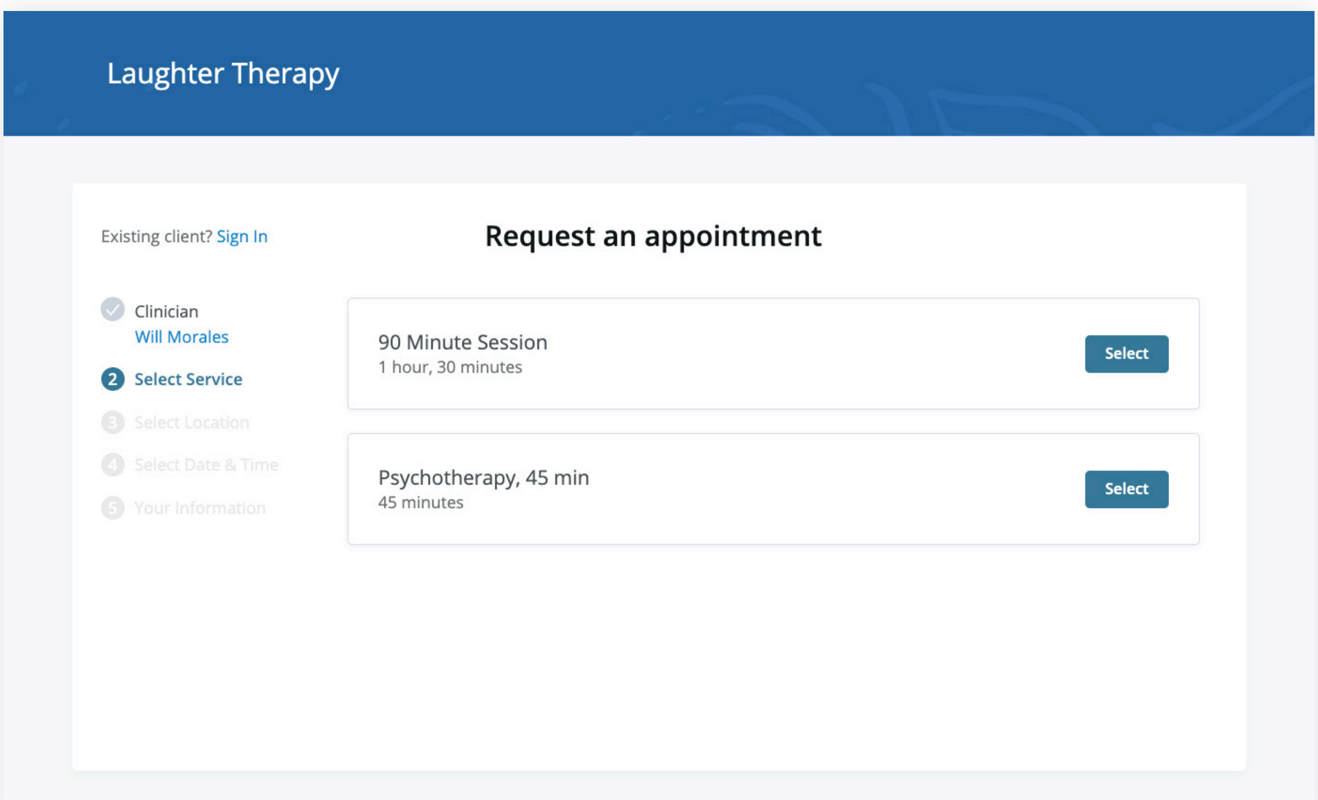
2. Navigate to the **Appointments tab** (This may already be selected by default).



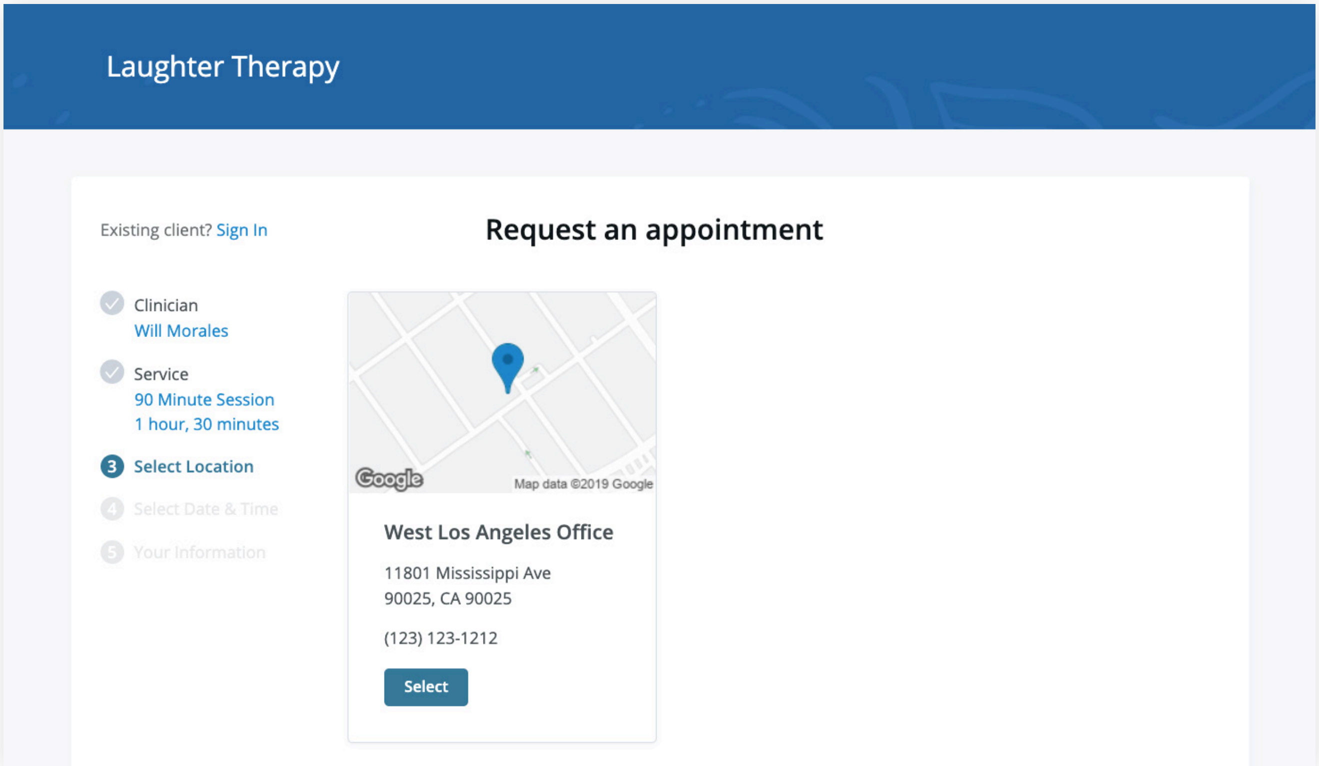
3. Select your **clinician** (if there are multiple).



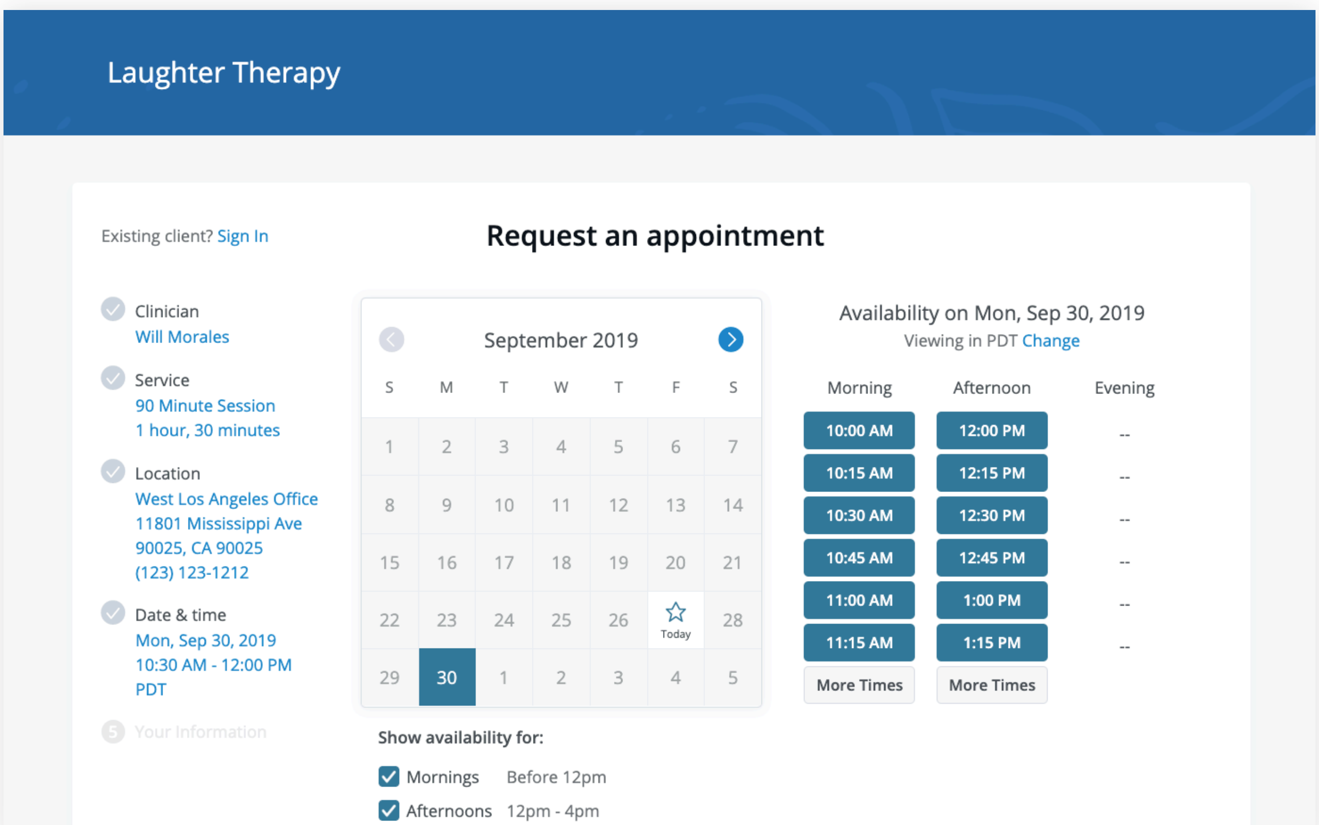
4. Select your **service**.



5. Choose your **office location** (there may only be one to select from, as shown below)

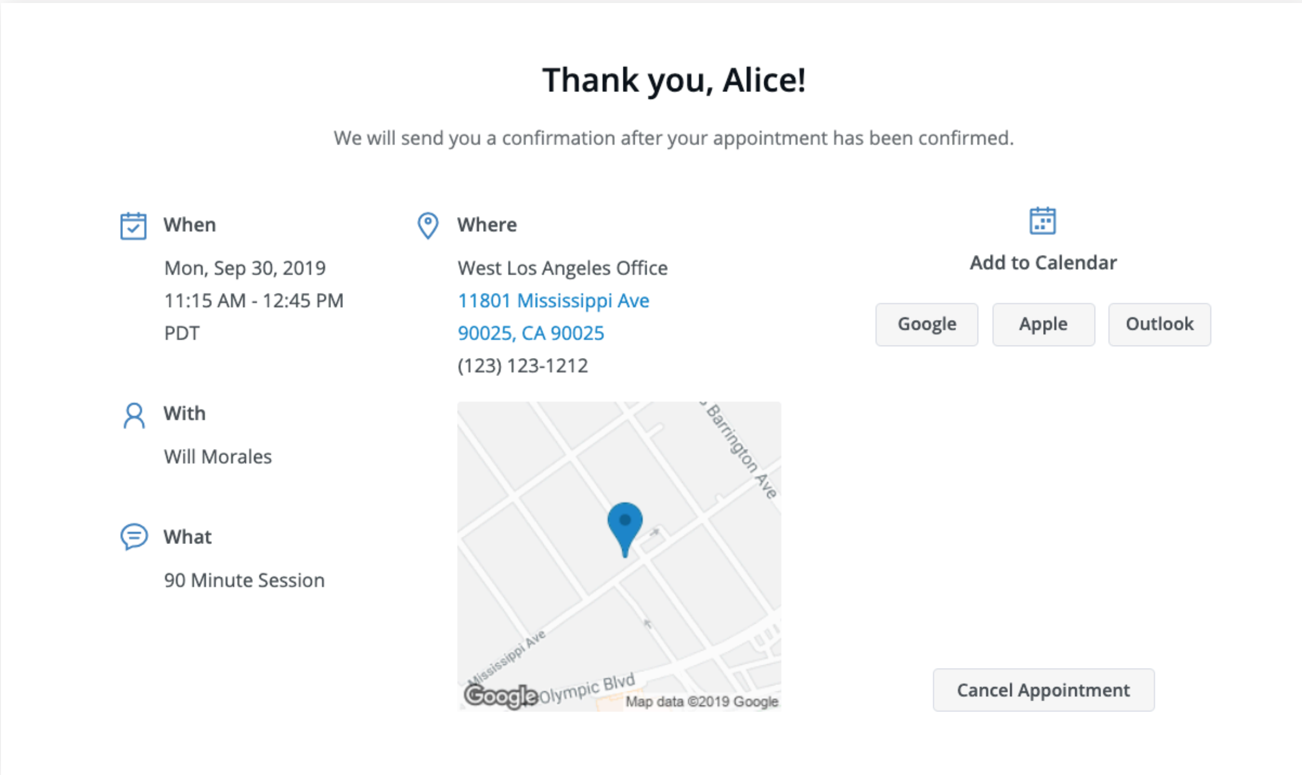


6. Click the **date and time** that you'd like.



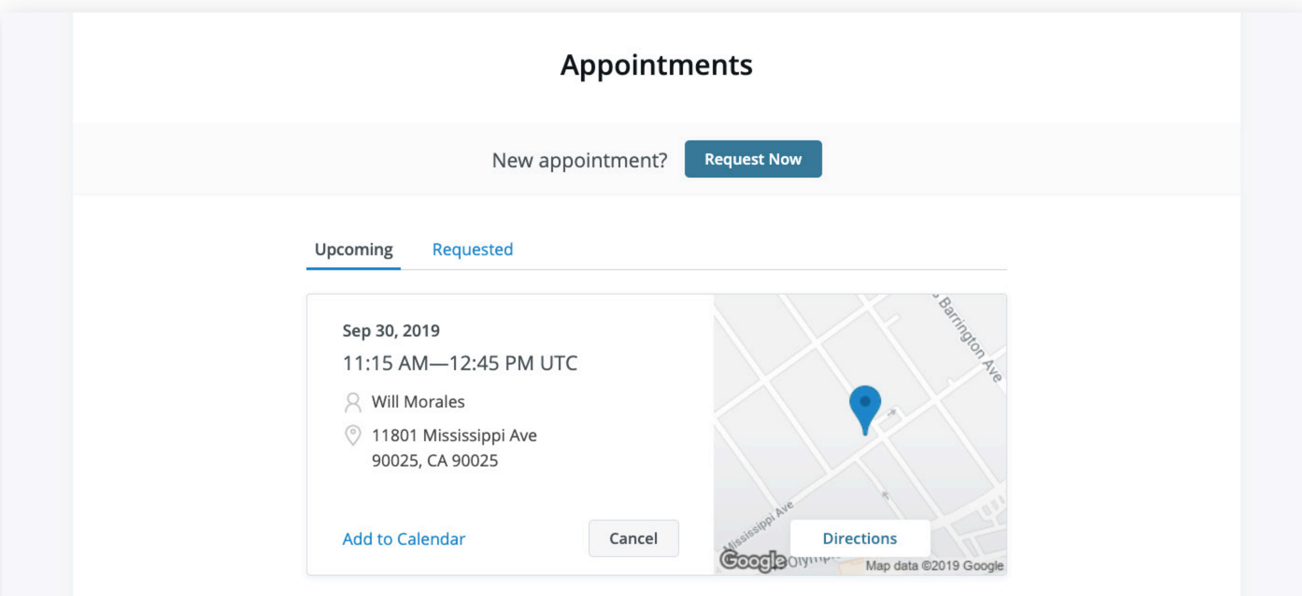
7. Your appointment request has been **sent** to your clinician. Your clinician will need to accept your request to make it official.

You can click to view a map of the office location, or add the session to your calendar.



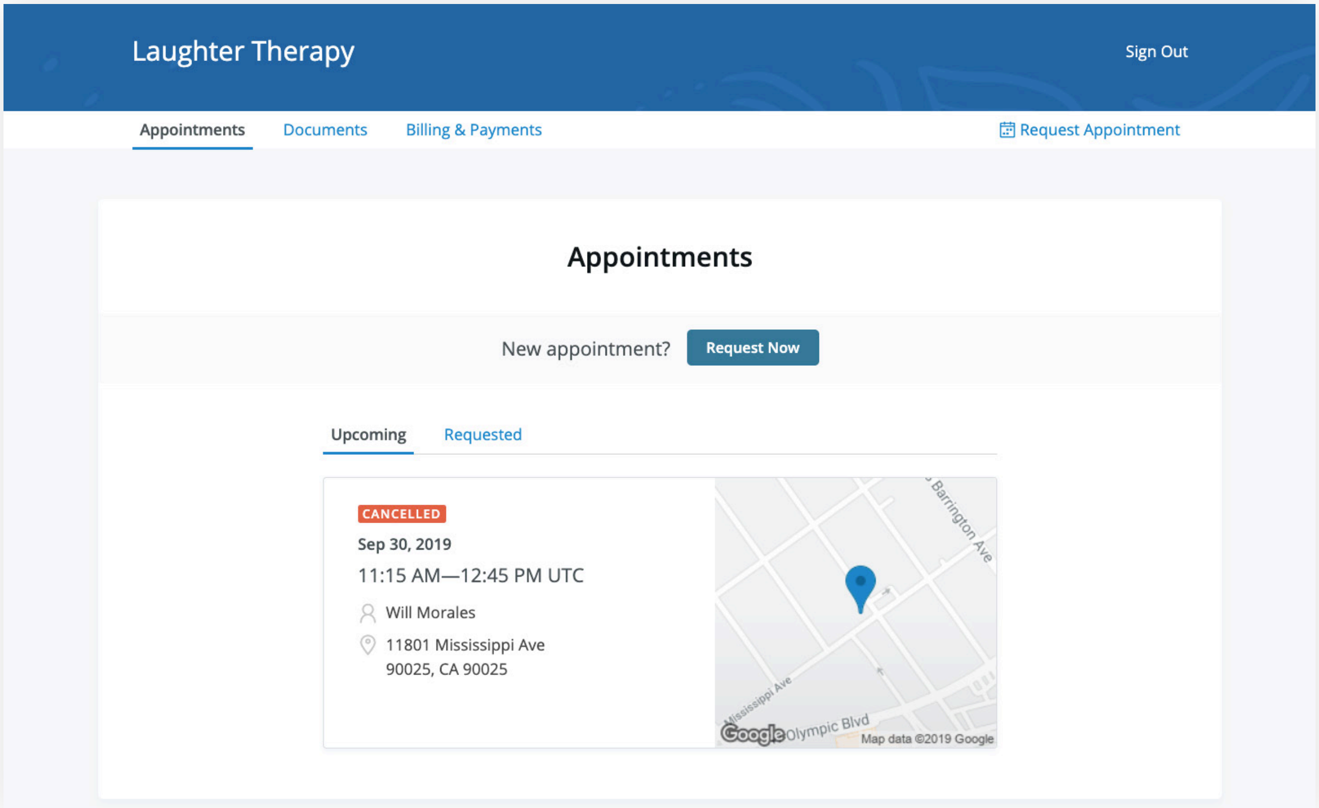
8. If your request is accepted, you'll receive an **email** confirming the session.

9. If they cannot see you at that time, you'll receive a link to reschedule. Click it to go back to your Client Portal and request a new session.



VIEWING AND CANCELLING REQUESTS

You'll see a list of your upcoming requests and confirmed or denied appointments on the Appointments page of your client portal. Click **Cancel Session** to cancel your appointment request.



NOTE: You'll only be able to cancel this way according to your clinician's cancellation policy. If you attempt to cancel too close to a session, or if they don't offer online cancellation, you'll receive a message to call their office to cancel.

Once your session is cancelled, you'll see this reflected on your **Appointments tab** in the Client Portal. Use this page to **check the status of your requests**, **cancel sessions**, or **schedule new ones**.

Congratulations!

You're now ready to start booking appointments in your Client Portal.

GETTING STARTED GUIDE

How to Pay Your Bills

with simplepractice

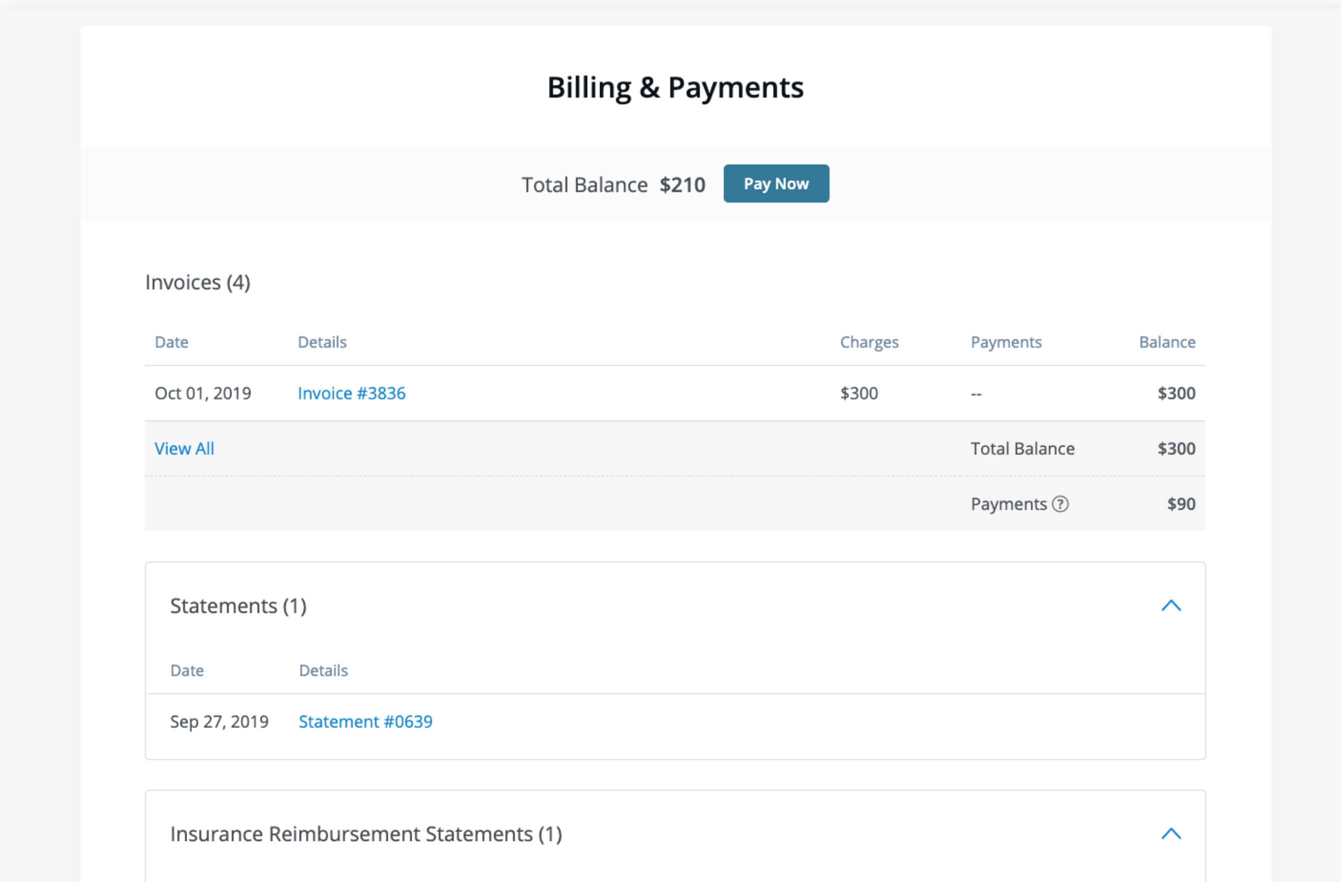
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

SECTIONS:

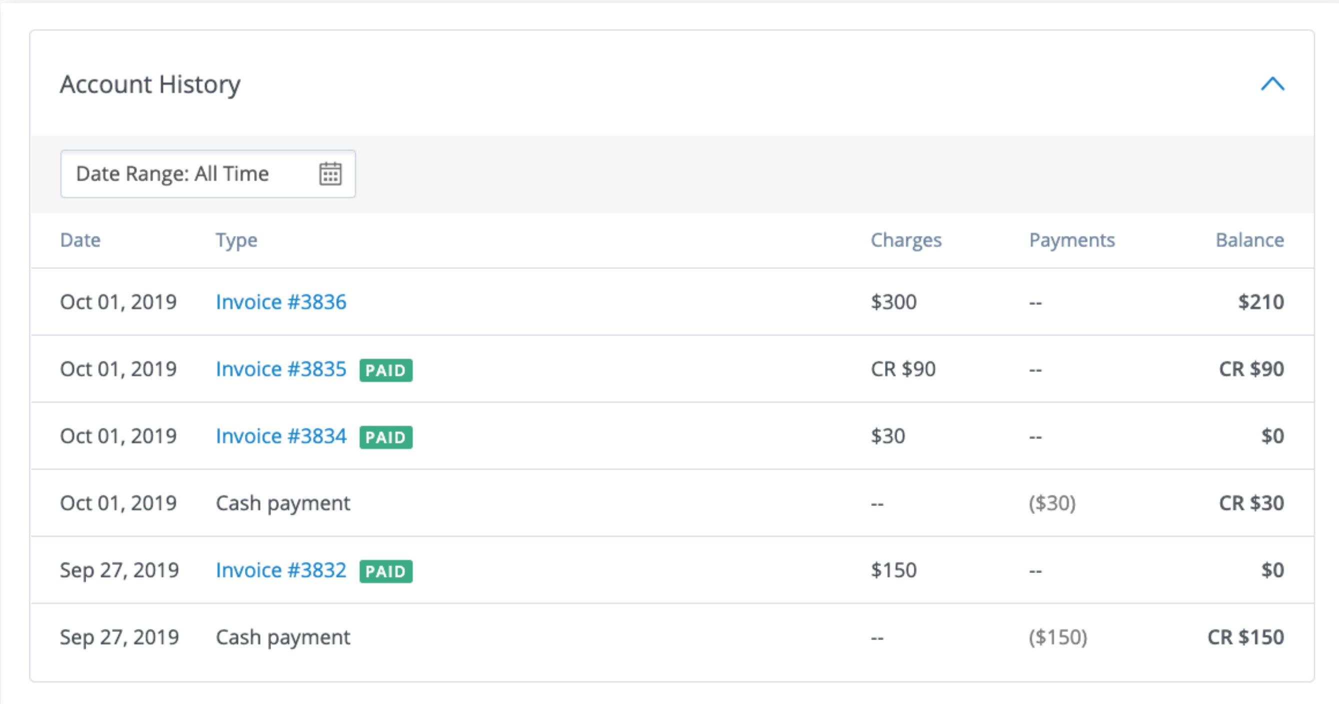
1. Viewing your billing history and documents
2. Making payments

VIEWING YOUR BILLING HISTORY AND DOCUMENTS

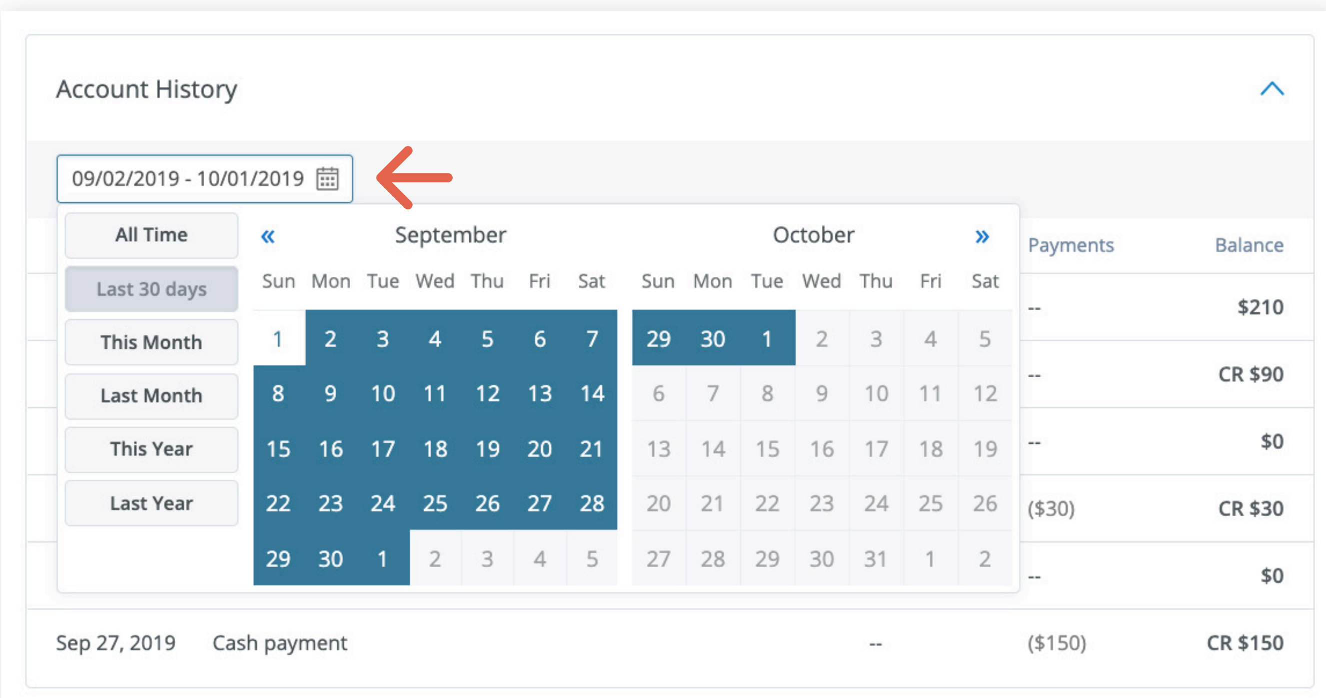
1. After logging into the Client Portal, click **Billing & Payments** to see your billing page. This page provides you with an overview of your recent payment history and access to your billing documents.
2. You'll see three sections for **Invoices**, **Statements**, and **Insurance Reimbursement Statements** (superbills).



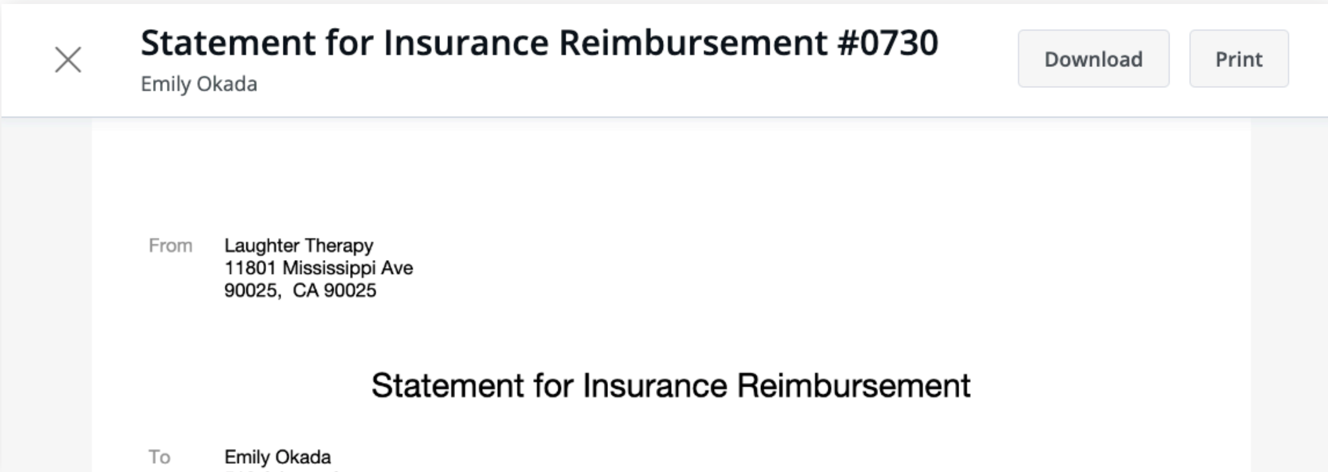
3. At the very bottom there's a section for **Account History** that shows your most recent sessions and payments.



4. Adjust the **date range** to display whichever sessions you'd like by clicking the calendar icon.



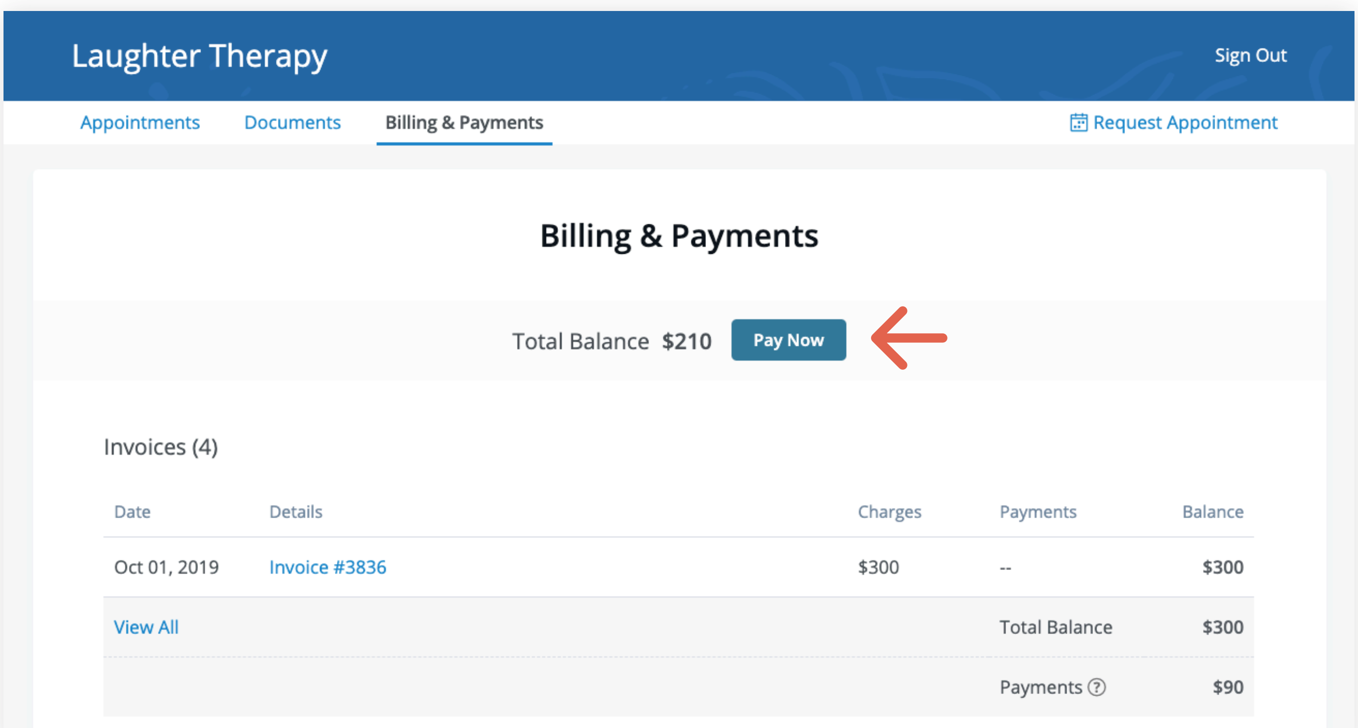
TIP: Once you open a document, you can click **Print** to print it or **Download PDF** to download it to your computer.



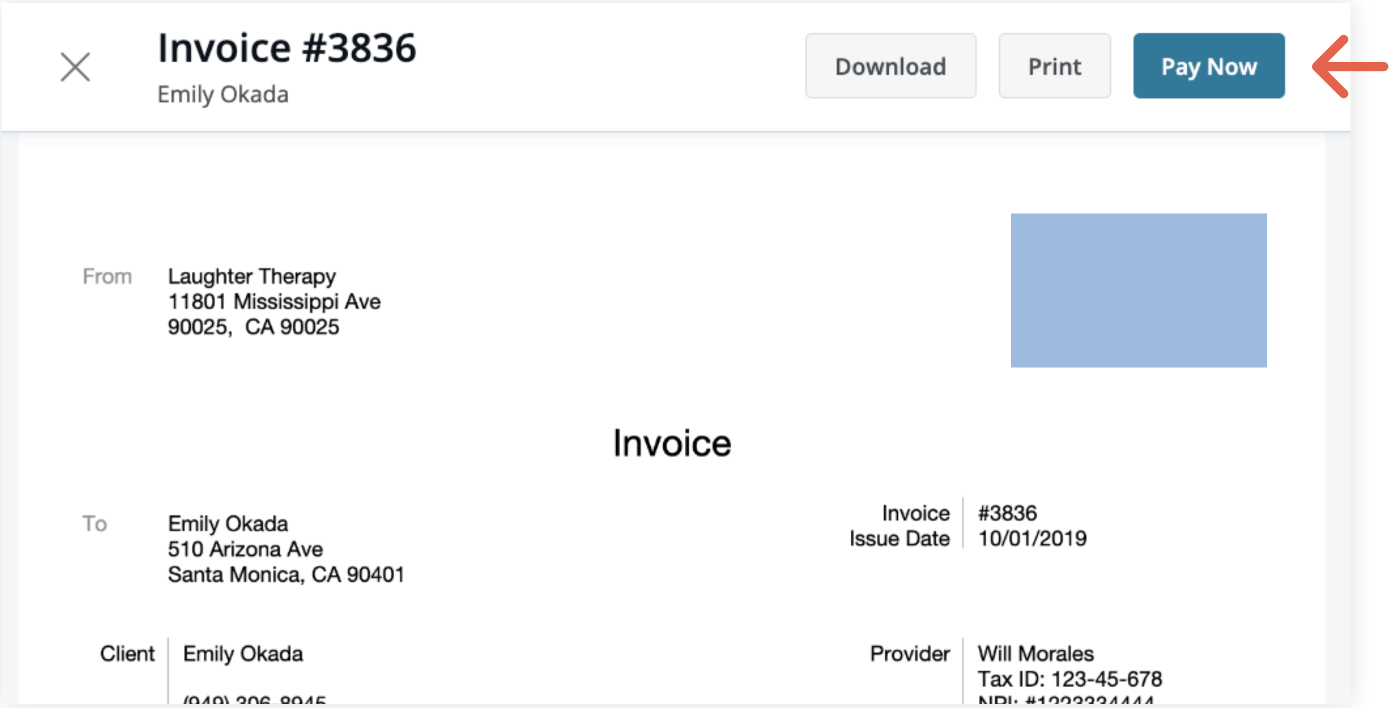
MAKING PAYMENTS

It's easy to pay your bills in the Client Portal and stay on top of your payment history. Your **current balance** displays at the top of the page. You can either pay this entire balance, or pay a specific invoice.

1. To pay your entire balance, click **Pay Now** next to the balance amount.



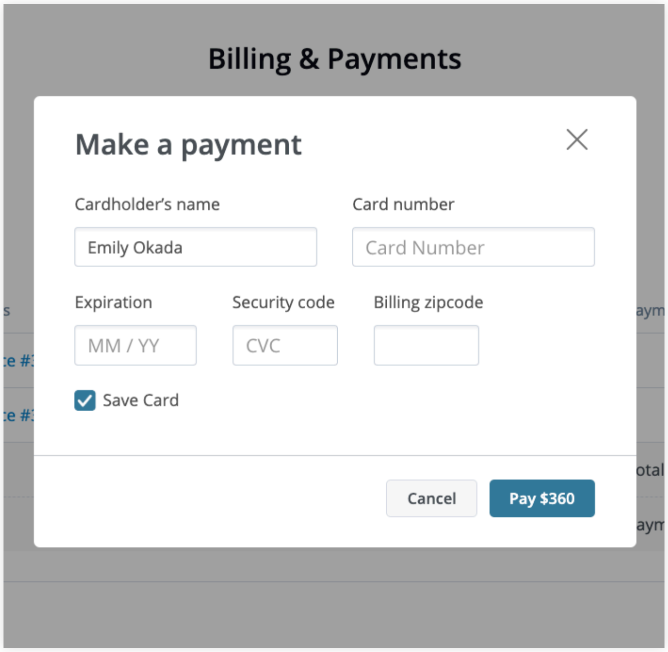
2. To pay a specific invoice, open the invoice and click **Pay Now** at the top.



No matter which pay button you choose, the next steps are the same:

1. Enter the cardholder's name, card info, and billing zip code.
2. If you'd like to store this card to use in the future, check the **Save Card** box.
3. The amount on the **Pay** button will reflect the payment that you're making. Make sure it's the correct amount, then click **Pay $(amount)**.
4. You'll see that the status next to that invoice date in your **Account History** section has changed to **Paid**.

If you stored the card, you'll be able to select this card for future payments.



Congratulations!

You're now ready to start managing billing in your Client Portal.