simplepractice

Complete Guide to the Client Portal

GETTING STARTED GUIDE

The Client Portal

with simplepractice

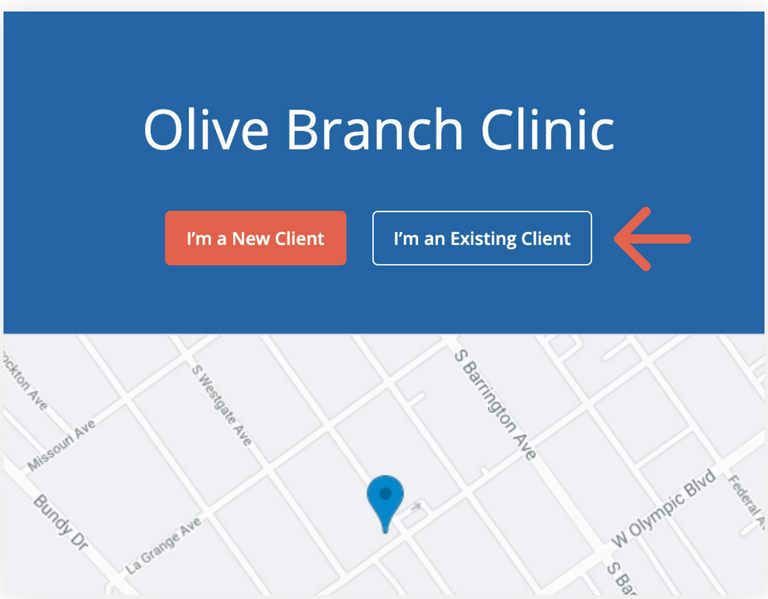
The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your appointment fees.

SECTIONS:

HOW DO I LOG IN?

Before logging into the Client Portal for the first time, you'll receive a welcome email from your clinician. By clicking the link, you'll automatically be 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

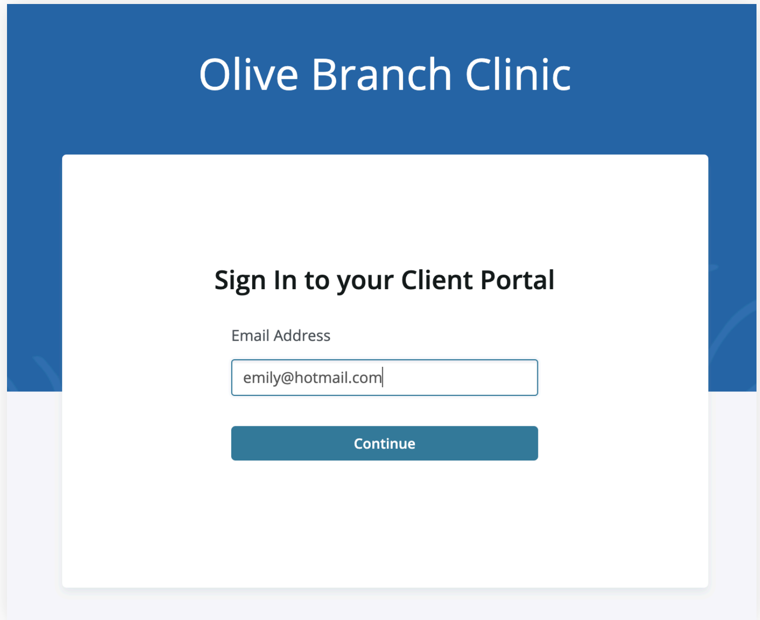


To log back in:

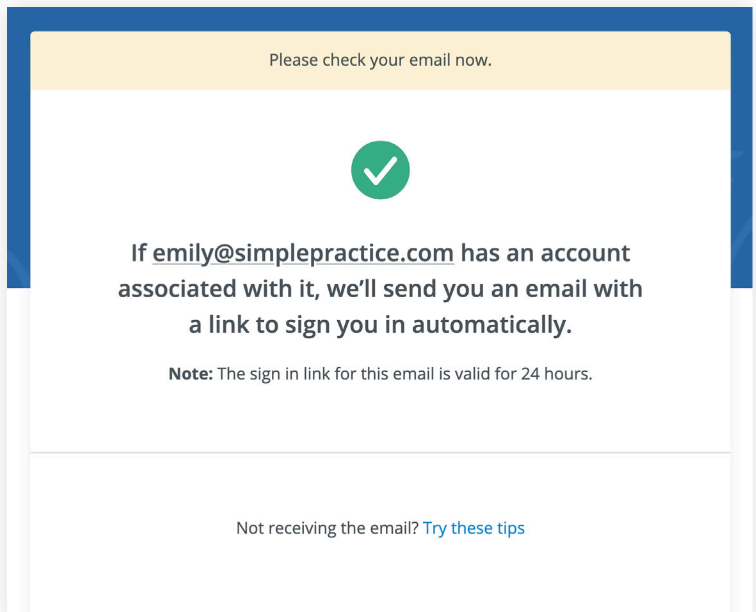
1. Go to your clinician's **Client Portal website**.
2. Click the **"I'm an Existing Client"** button.

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

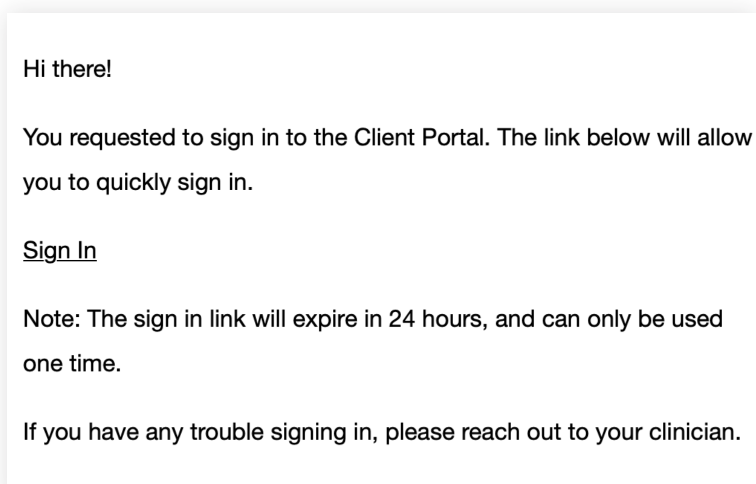
3. Enter the **email address associated with your account**. You'll receive an **email with a link** to get into your Client Portal.



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.

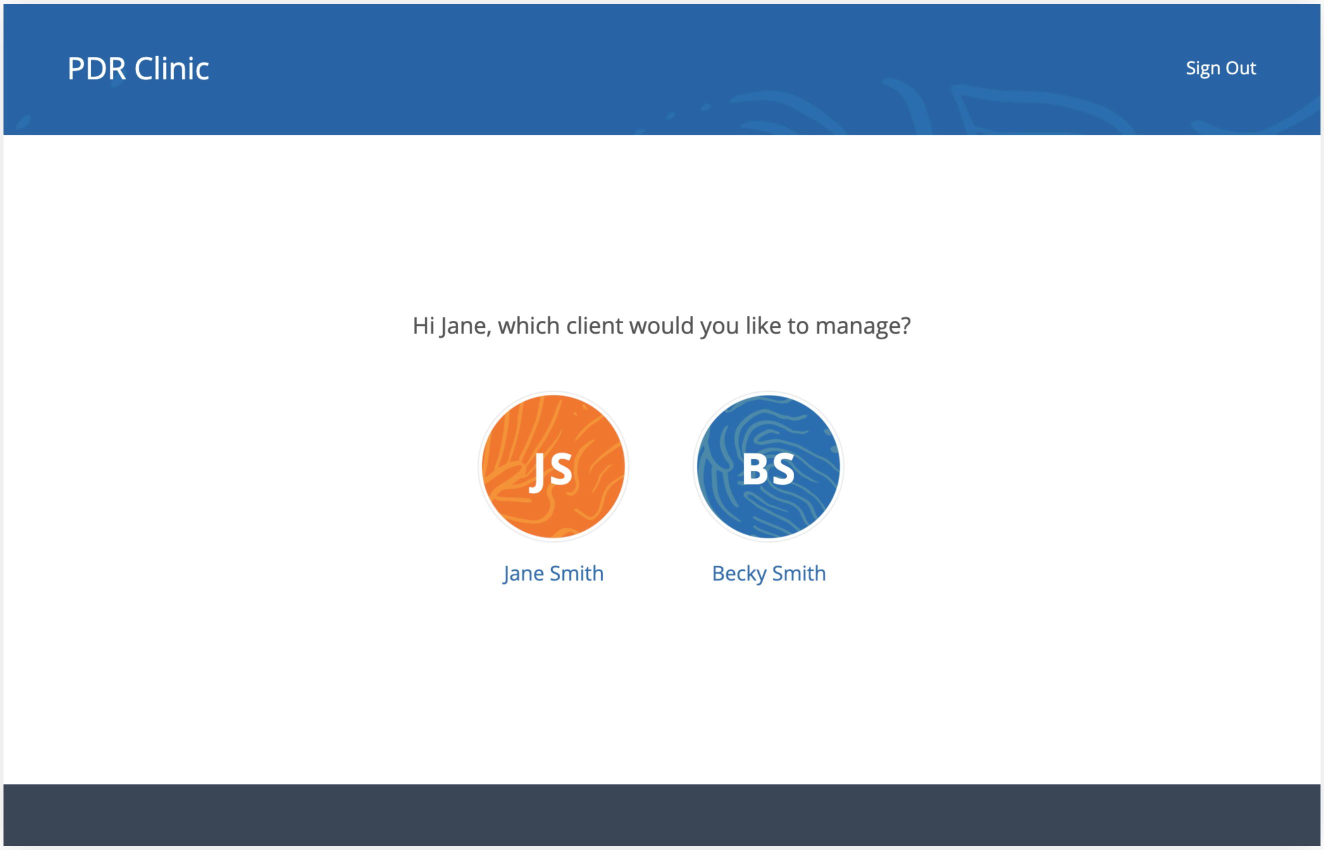


5. Click the **"Sign In"** link from the email to automatically log into your Client Portal. It expires after 24 hours and can only be used to log in one time.



MINORS MANAGEMENT

If you are the guardian of a minor(s), and your clinician has given you access to their Client Portal (as well as your own), you will see icons after you log in. **Click on 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. It also helps to 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, this will cause it to appear as inaccurate.
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 exact.
4. The same email can't be used for more than one portal account for the same clinician.

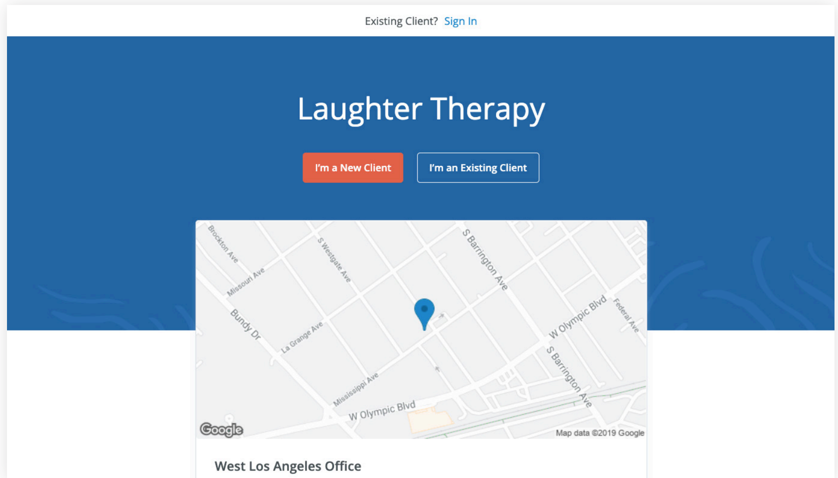
Be sure to use the same email address that you normally use to log into your Client Portal, and check your spam

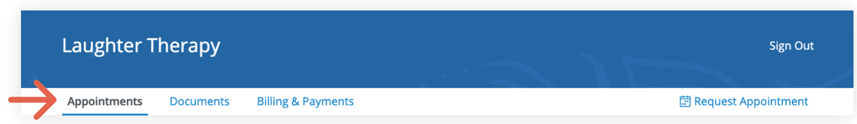
ONLINE BOOKING

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.

The following steps will show you how to request appointments.

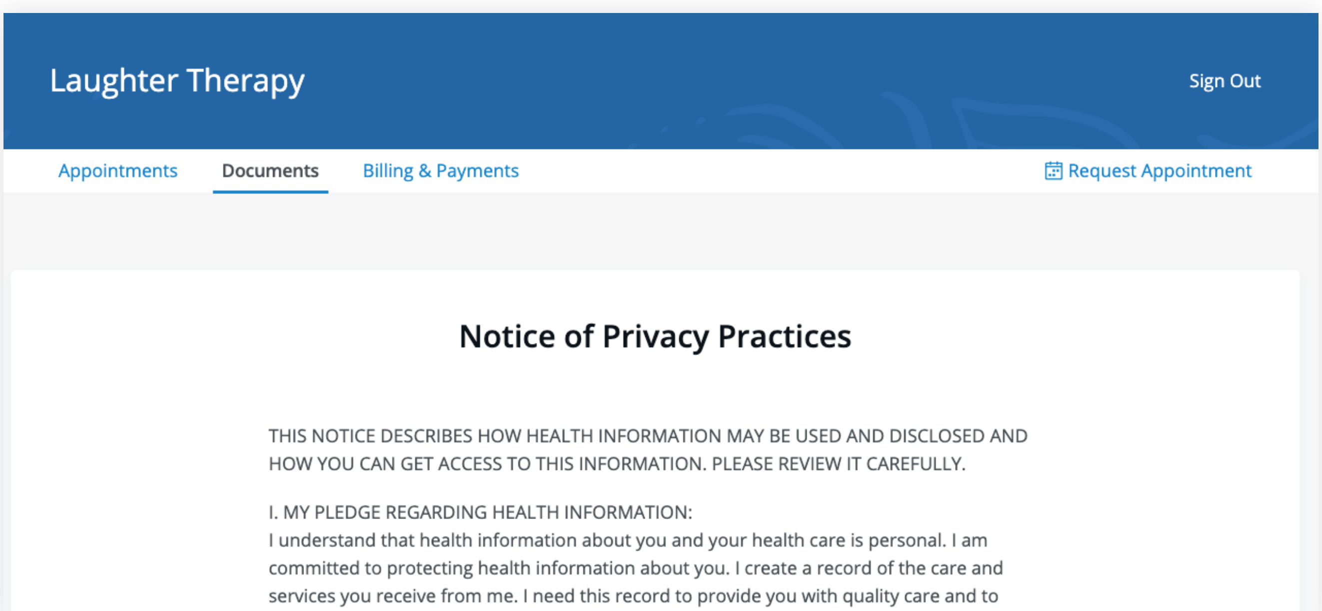
1. Go to your clinician's Client Portal and click Existing Client to log in. (The New Client button is only for clients who have never logged into the Client Portal before).
2. Navigate to the appointments tab. (This may already be selected by default after you log in).



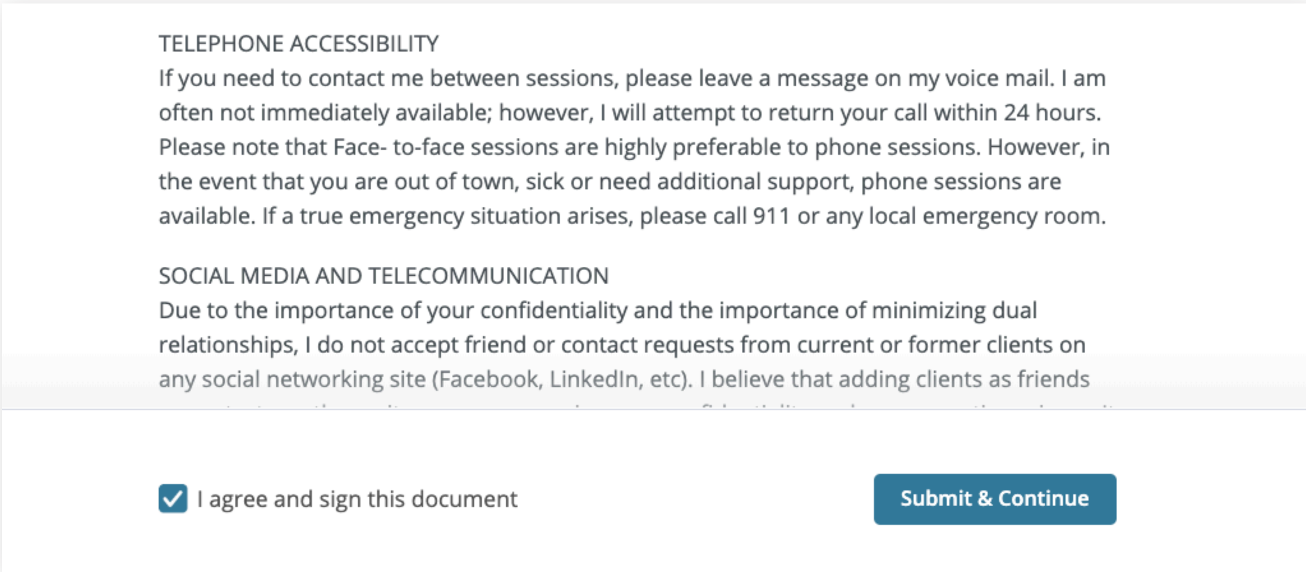


DOCUMENTS AND FORMS

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 start filling out forms from your clinician.



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

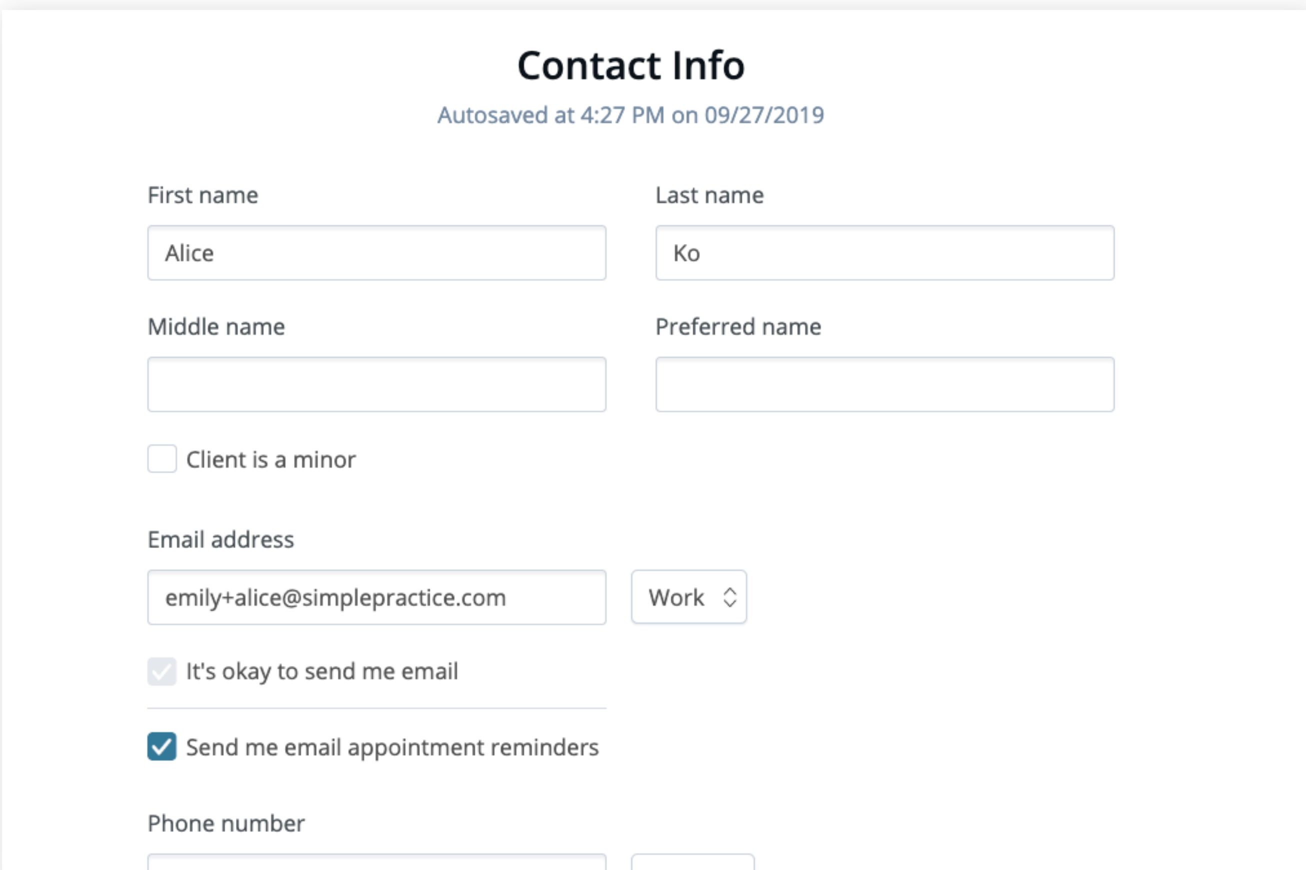

TELEPHONE ACCESSIBILITY
If you need to contact me between sessions, please leave a message on my voice mail. I am often not immediately available; however, I will attempt to return your call within 24 hours. Please note that Face- to-face sessions are highly preferable to phone sessions. However, in the event that you are out of town, sick or need additional support, phone sessions are available. If a true emergency situation arises, please call 911 or any local emergency room.

SOCIAL MEDIA AND TELECOMMUNICATION
Due to the importance of your confidentiality and the importance of minimizing dual relationships, I do not accept friend or contact requests from current or former clients on any social networking site (Facebook, LinkedIn, etc). I believe that adding clients as friends

I agree and sign this document

Submit & Continue

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


Contact Info

Autosaved at 4:27 PM on 09/27/2019

First name

Alice

Last name

Ko

Middle name

Preferred name

Client is a minor

Email address

emily+alice@simplepractice.com

Work

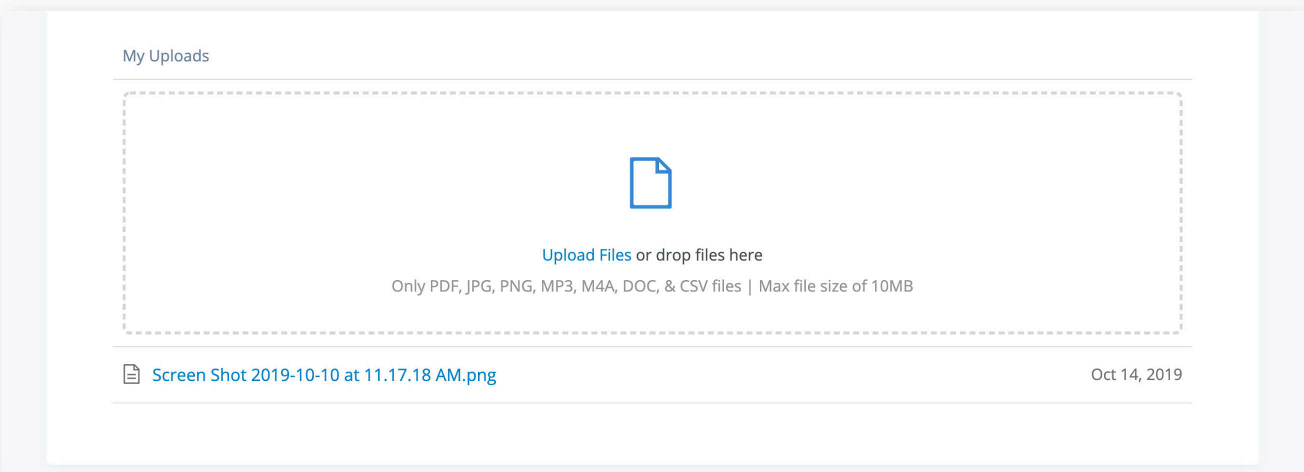
It's okay to send me email

Send me email appointment reminders

Phone number

To view your completed documents at any time, navigate to 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 send and receive messages directly with your clinician. Reschedule your session or ask a question from your phone.

SECTIONS:

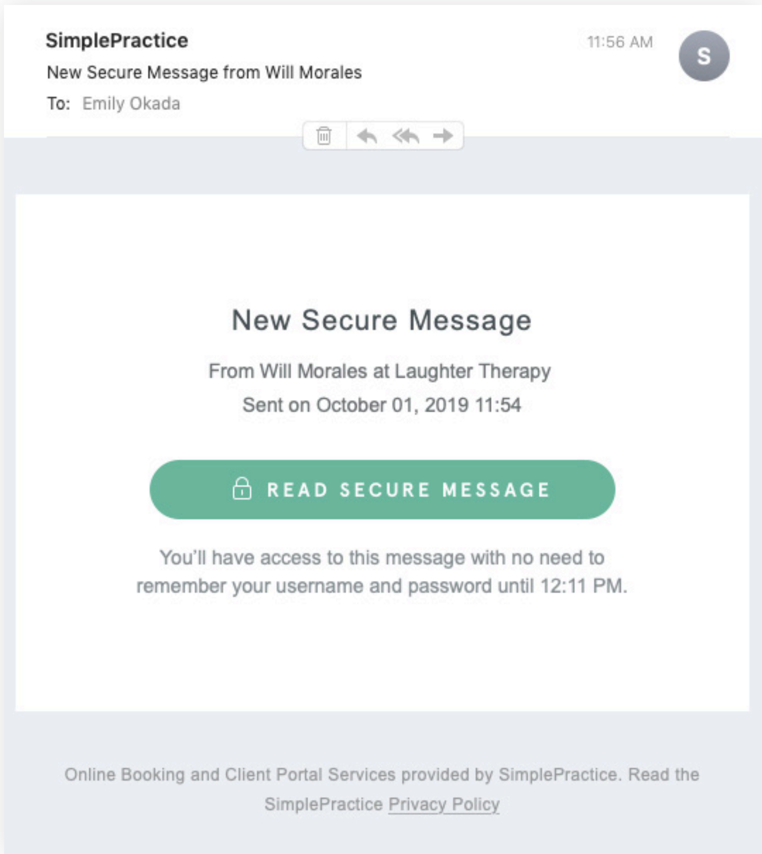
1. Message notifications

2. How to reply

MESSAGE NOTIFICATIONS

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

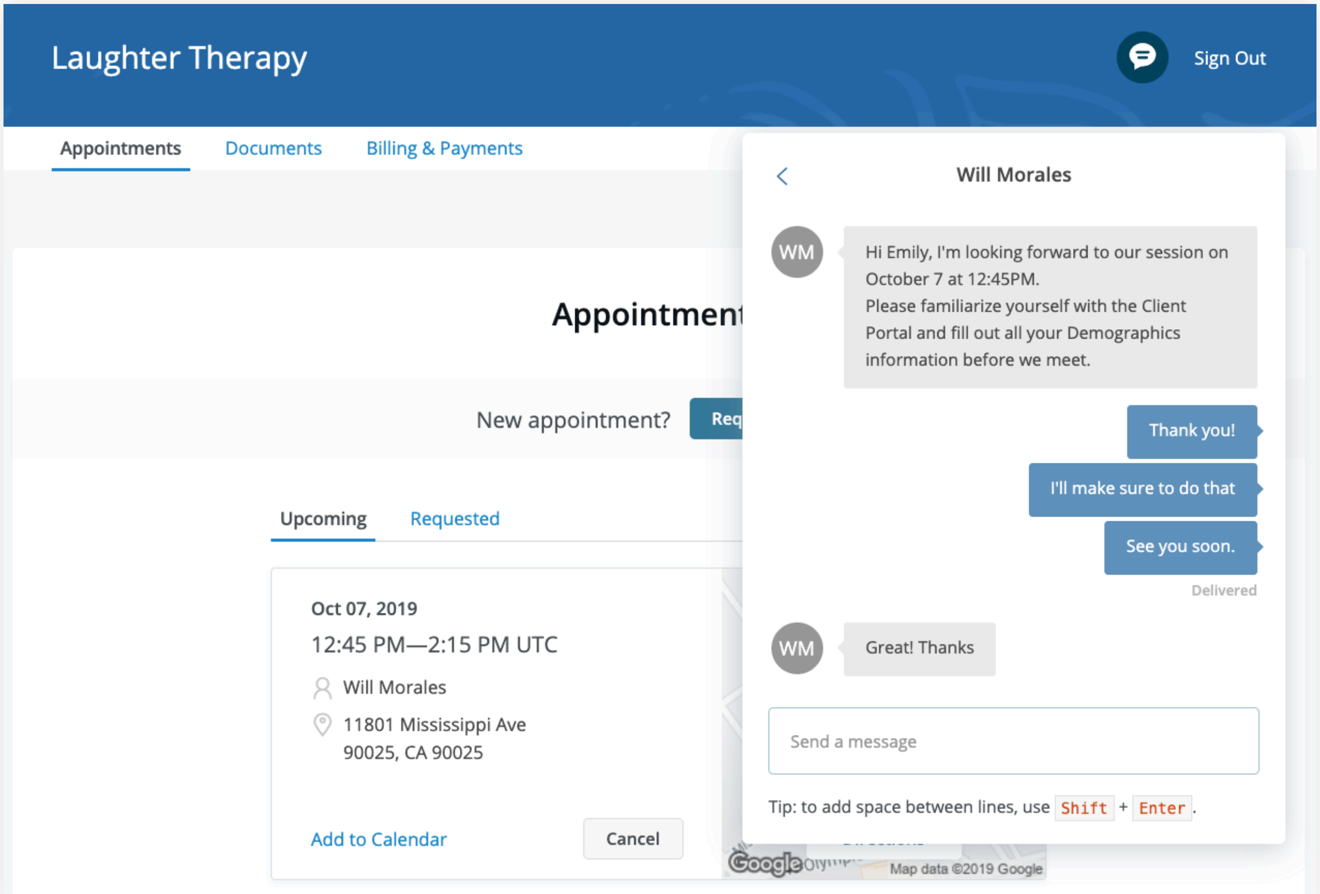
1. Click on the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**.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



NOTE: After 15 minutes, you'll have to enter your Client Portal username and password to log in and view your message.

HOW TO REPLY

Start typing your message in the box that says "Send a message," then hit Send 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 on 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

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

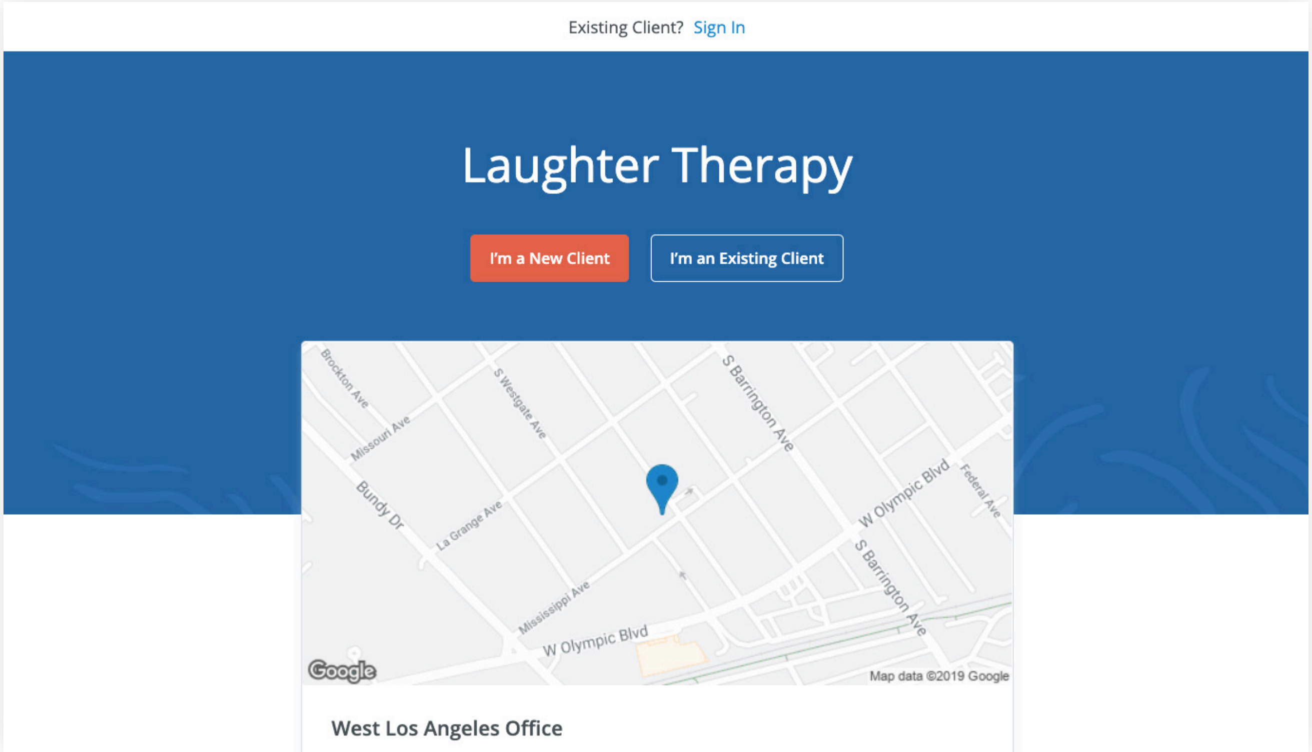
SECTIONS:

1. Request a session
2. Cancelling requests

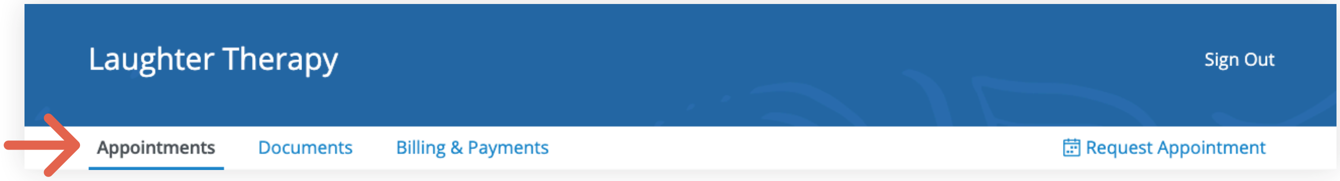
REQUEST A SESSION

The following steps will show you how to request appointments.

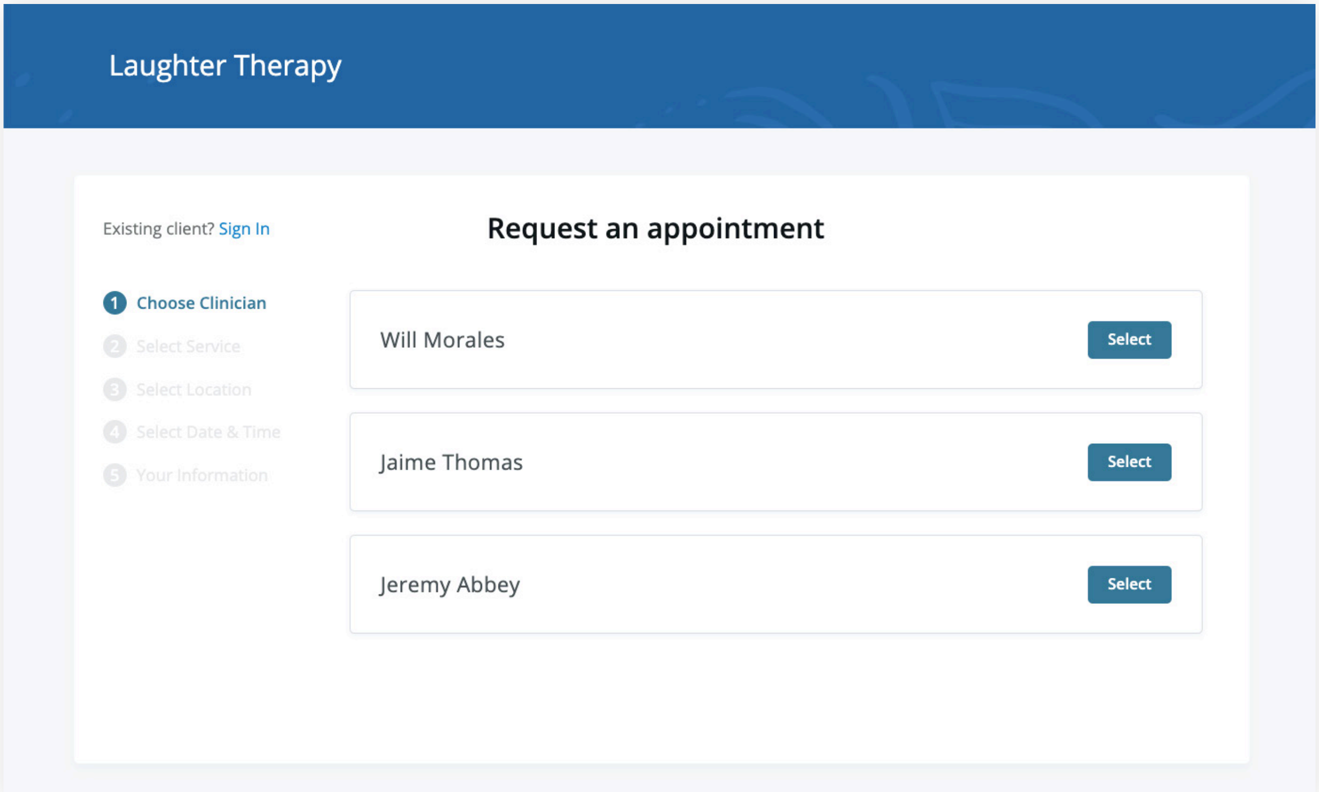
1. Go to your clinician's **Client Portal** and click **Existing Client** to log in. (The New Client button is only for clients who have never logged into the Client Portal before).



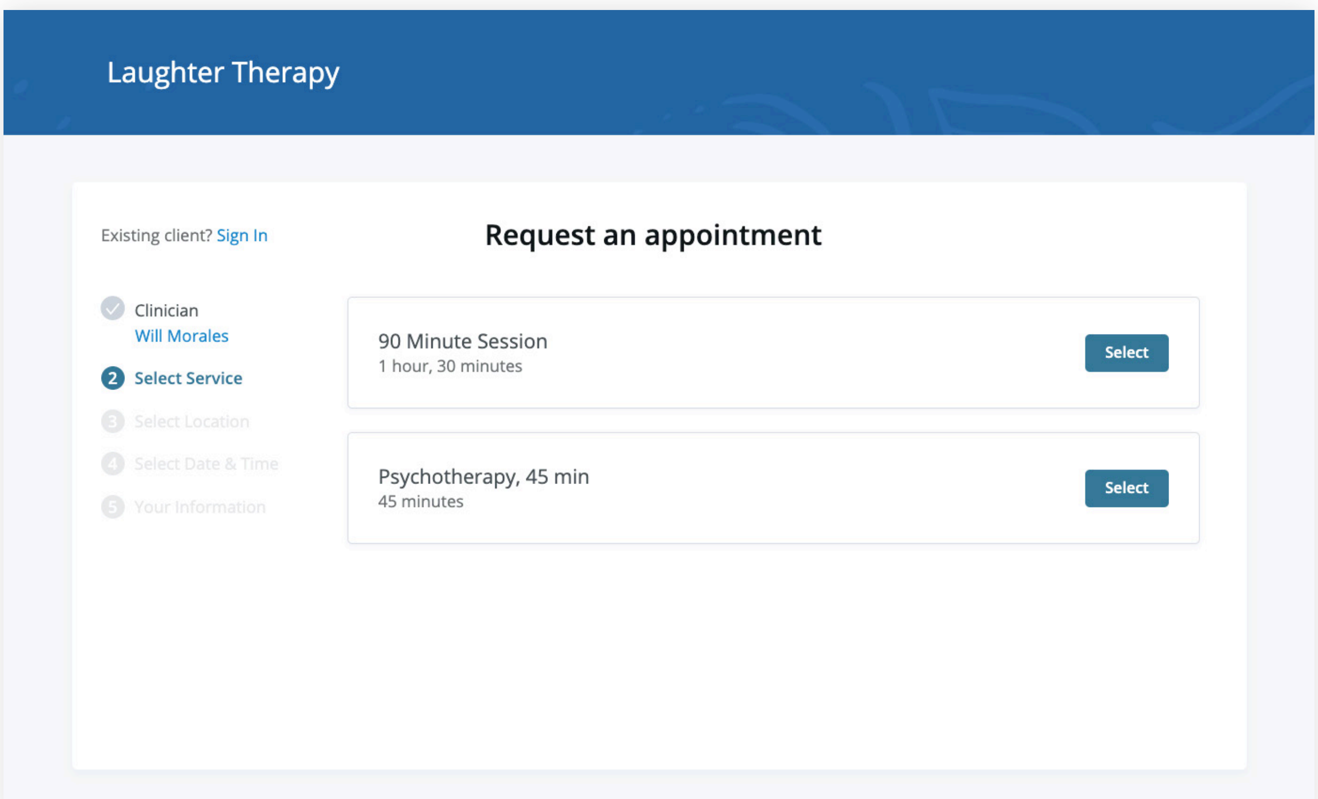
2. Navigate to the **Appointments tab** (This may already be selected by default).



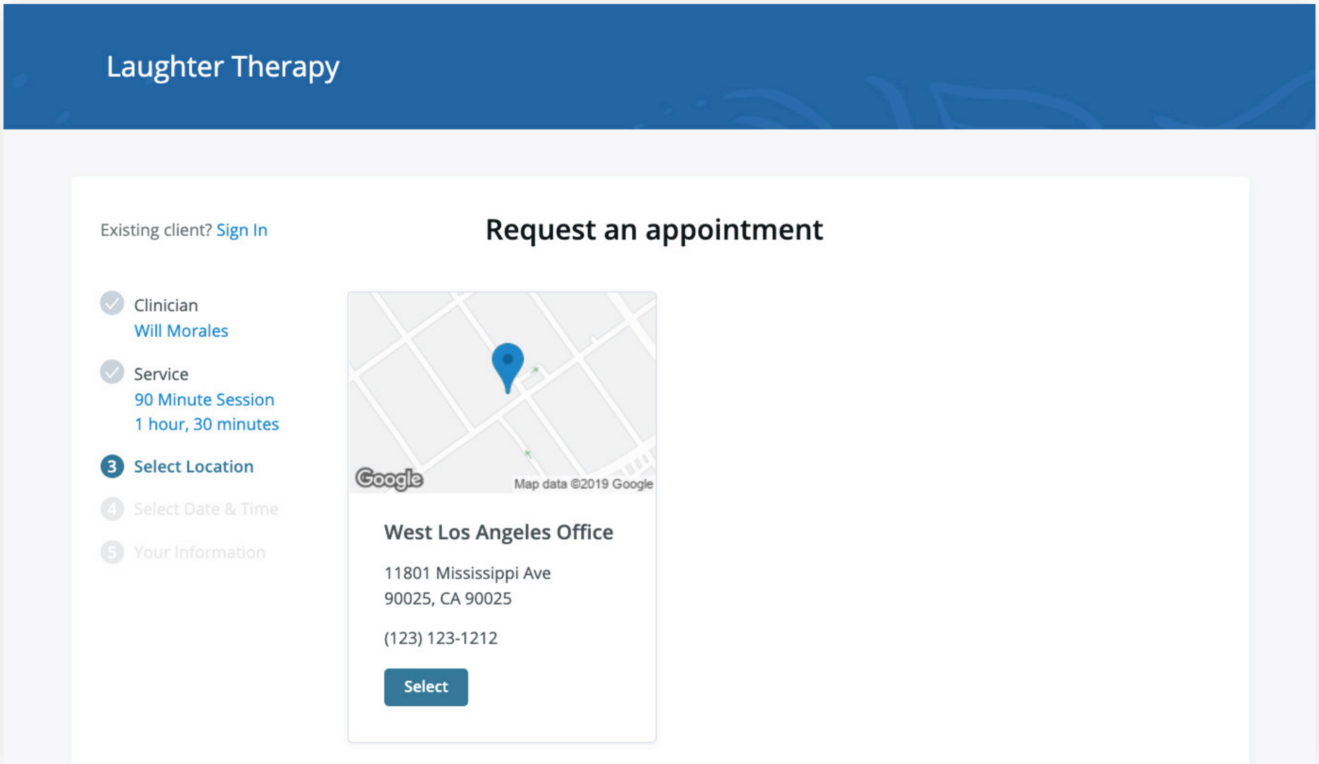
3. Select your **clinician** (if there are multiples).



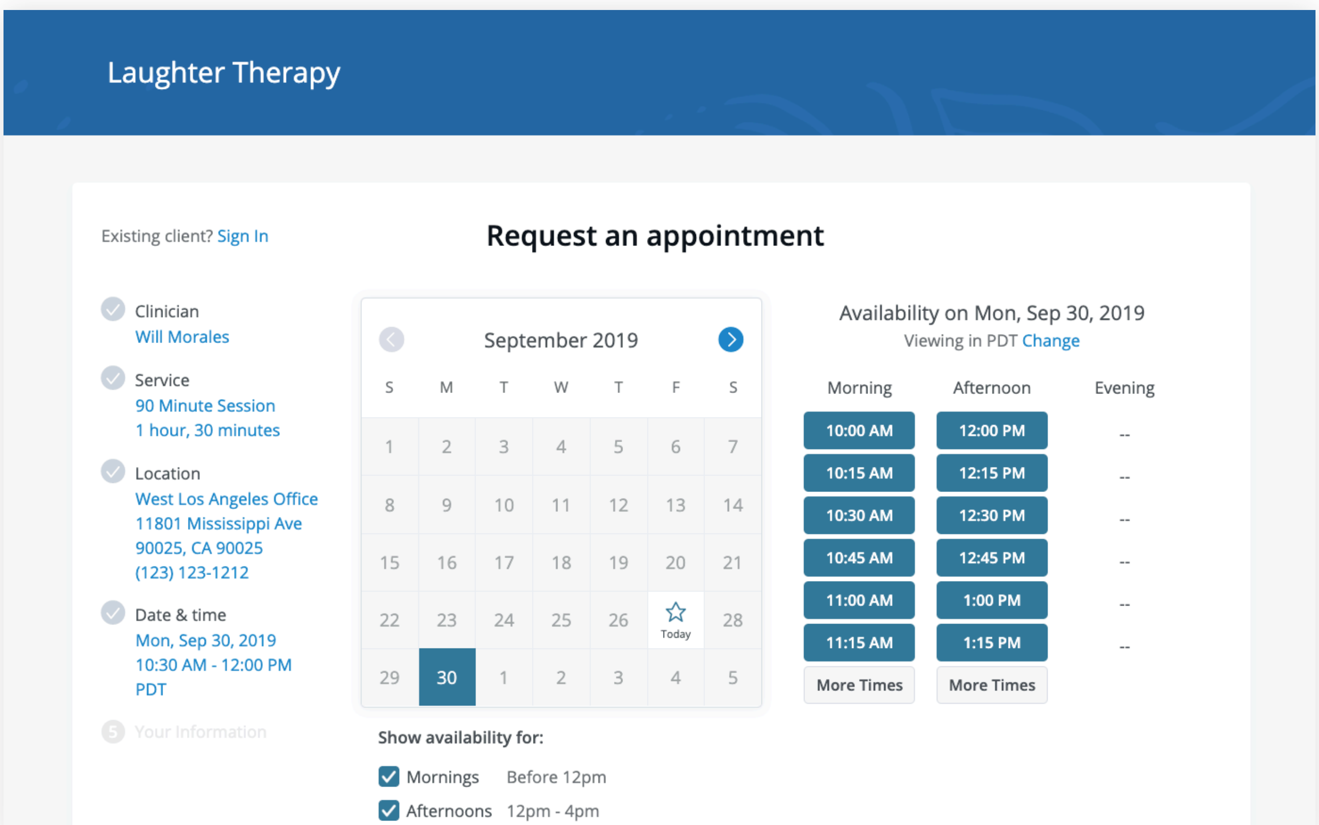
4. Select your **service**. What type of appointments do you see your clinician for?



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

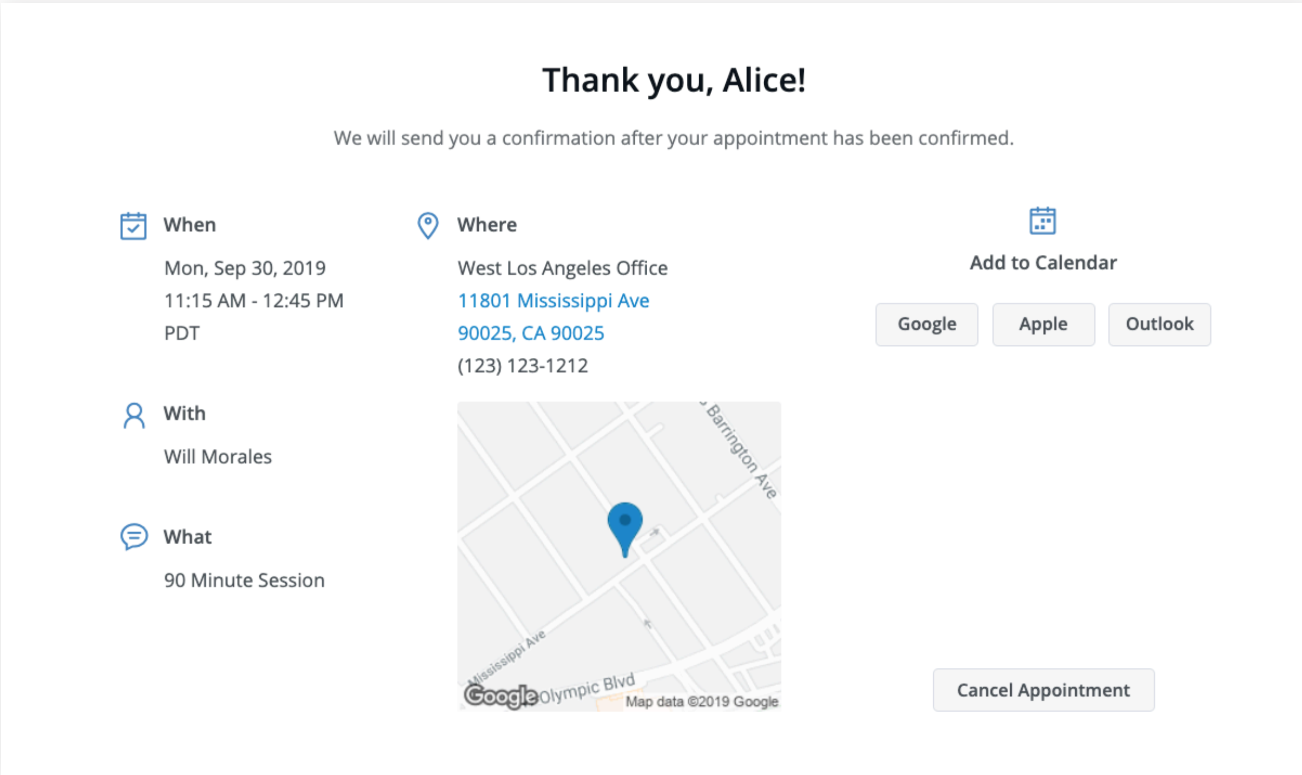


6. Click on the **date and time** that you'd like.



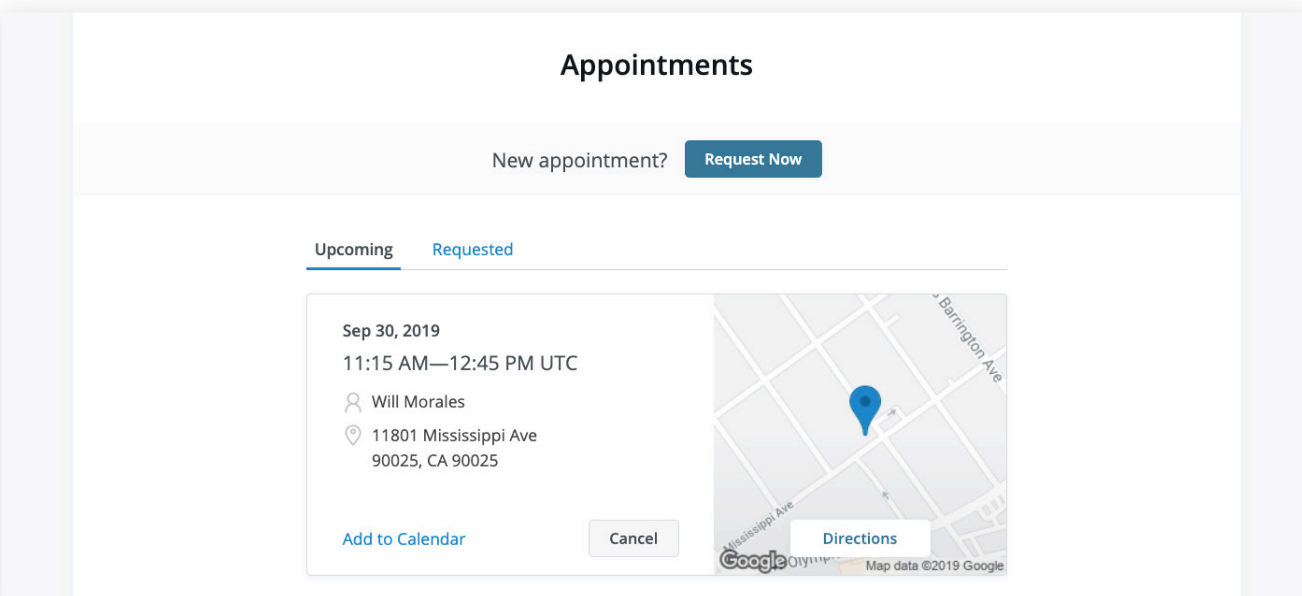
7. Your appointment request has been **sent** to your clinician (Your clinician will need to accept your request).

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



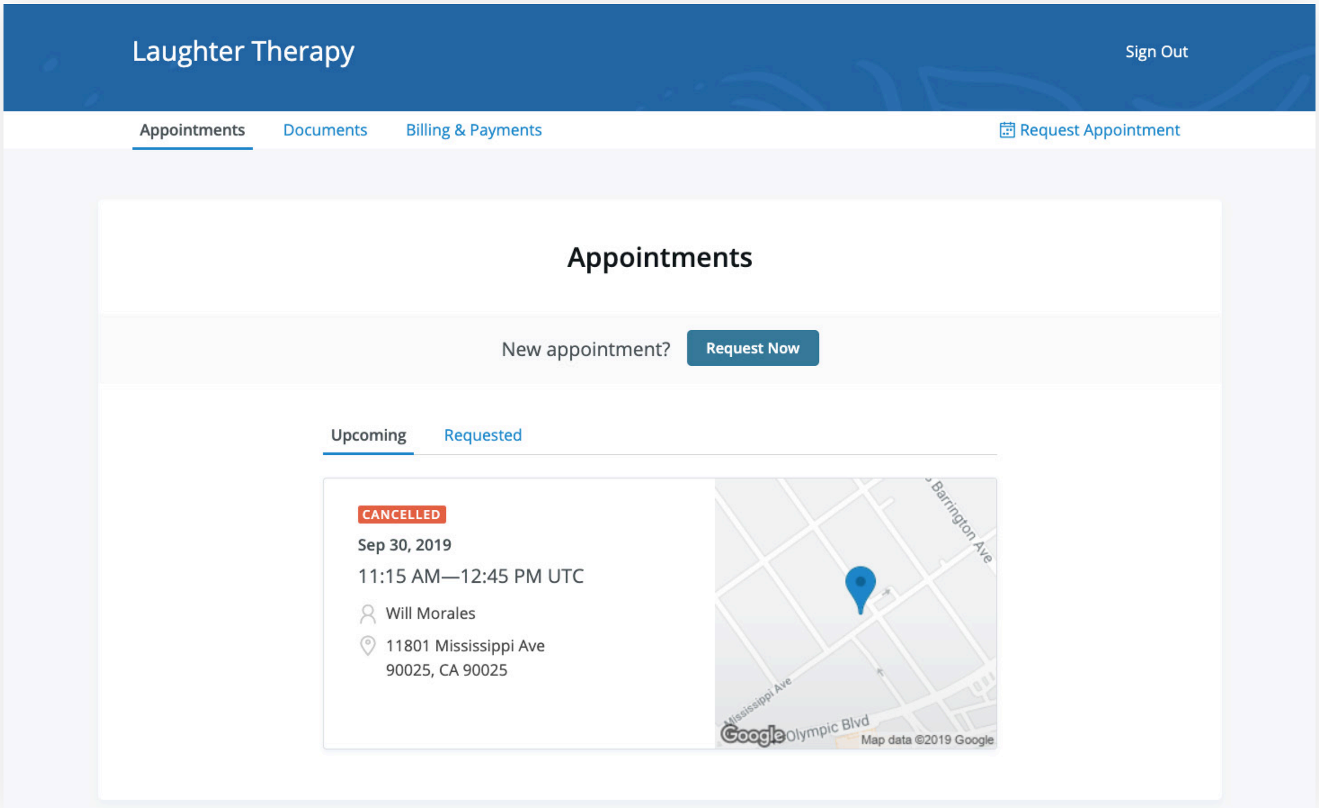
8. If your request is accepted, you'll receive an **email** confirming the session.

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

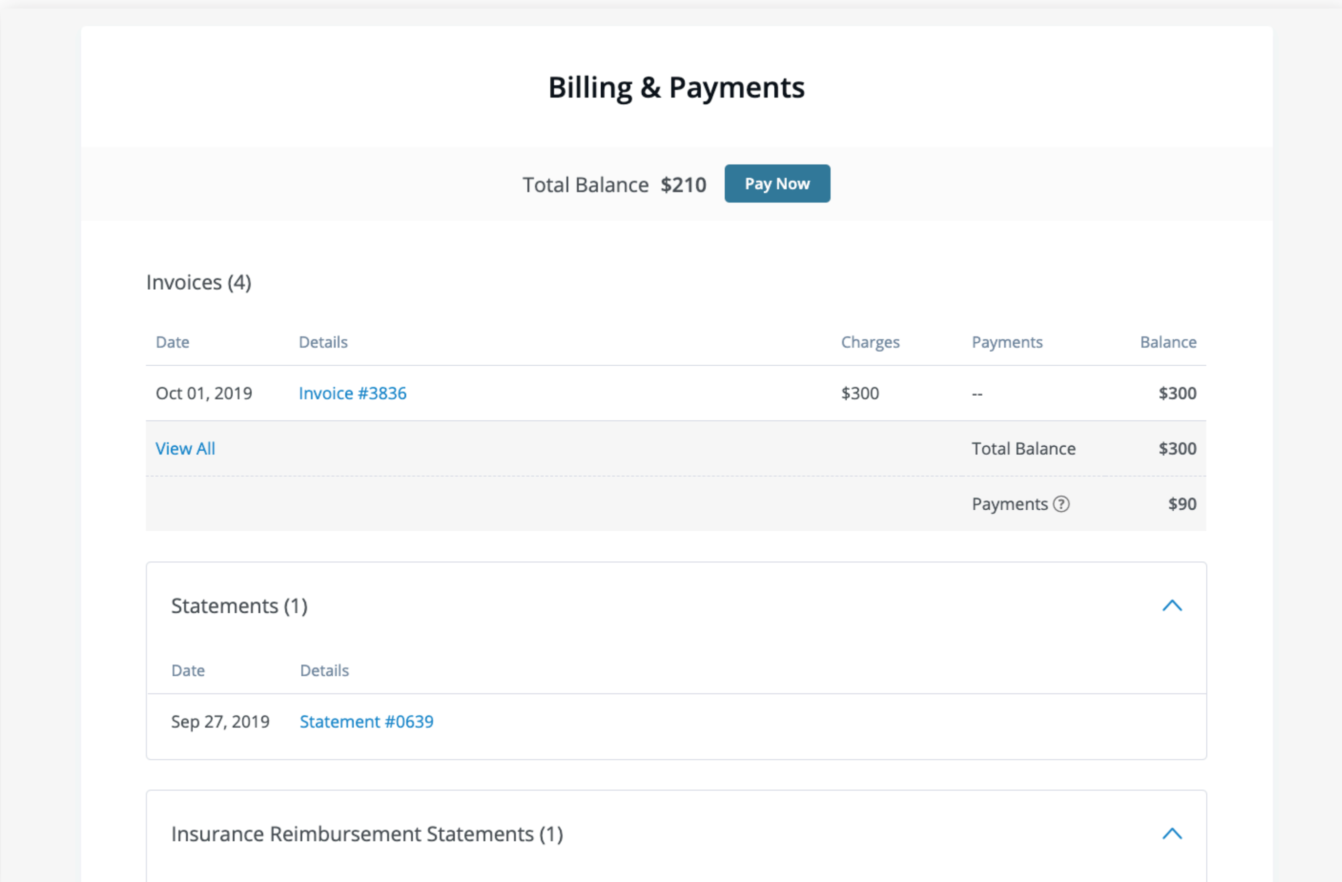
with simplepractice

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.

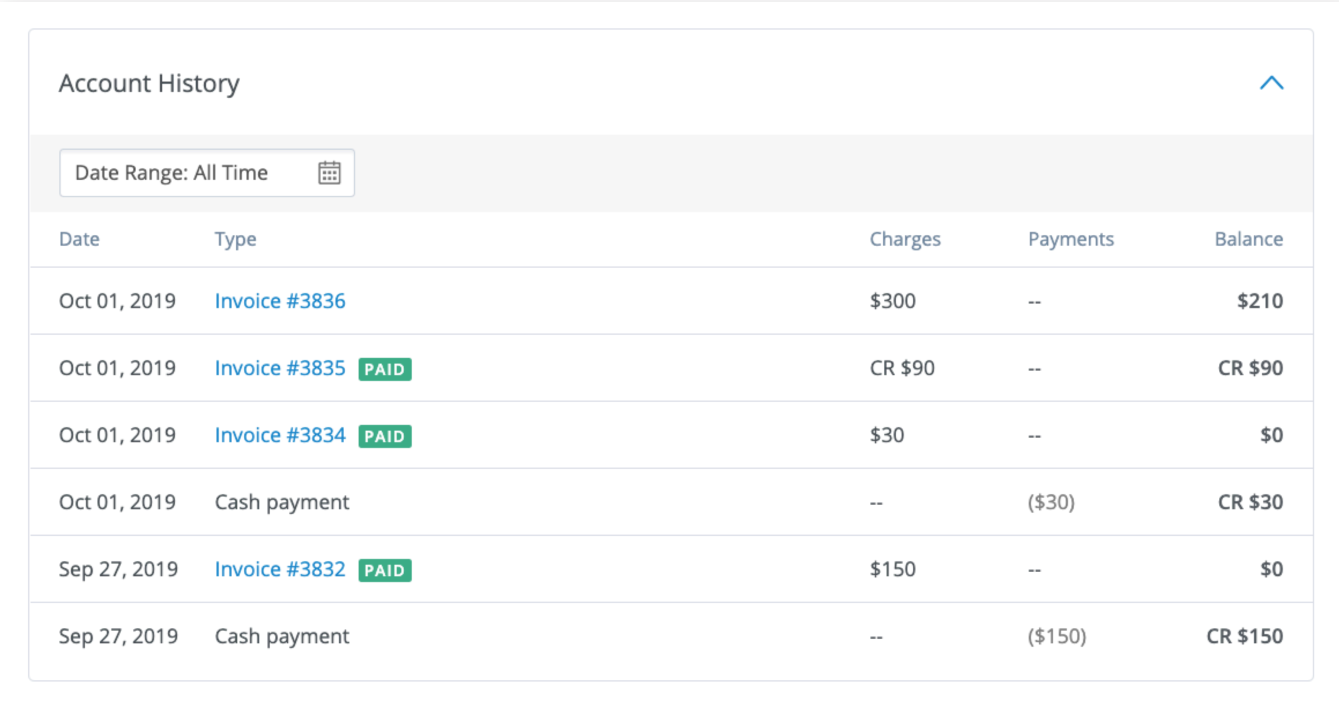
SECTIONS:

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.

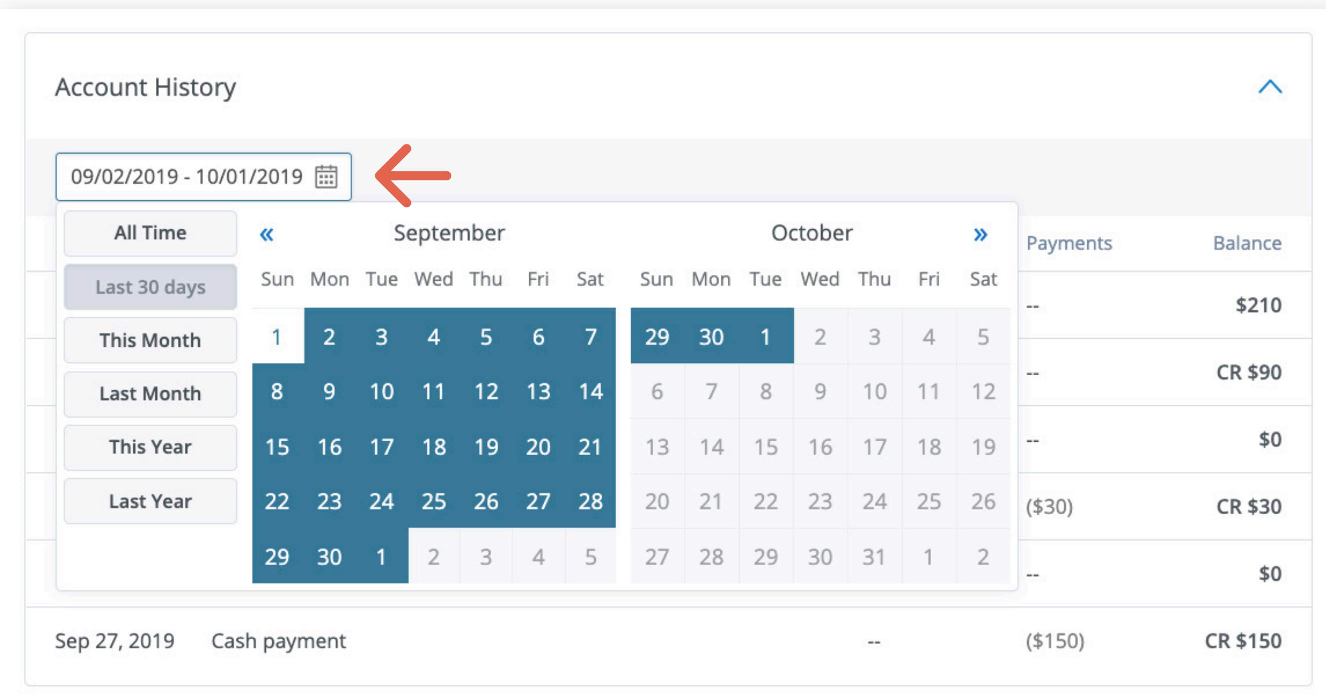


Account History

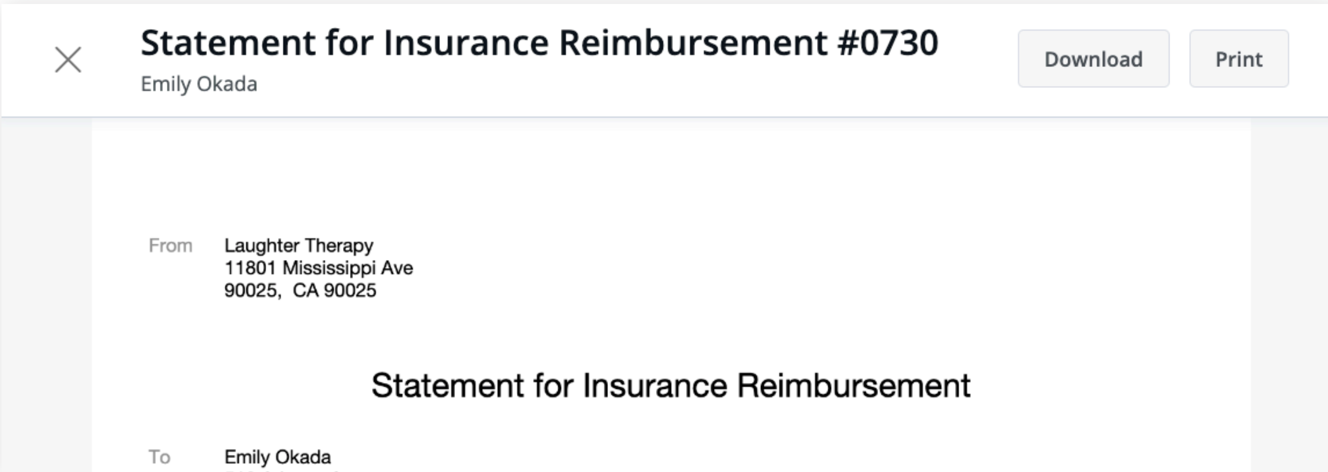
Date Range: All Time

Date	Type	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	$300	--	$210
Oct 01, 2019	Invoice #3835 PAID	CR $90	--	CR $90
Oct 01, 2019	Invoice #3834 PAID	$30	--	$0
Oct 01, 2019	Cash payment	--	($30)	CR $30
Sep 27, 2019	Invoice #3832 PAID	$150	--	$0
Sep 27, 2019	Cash payment	--	($150)	CR $150

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



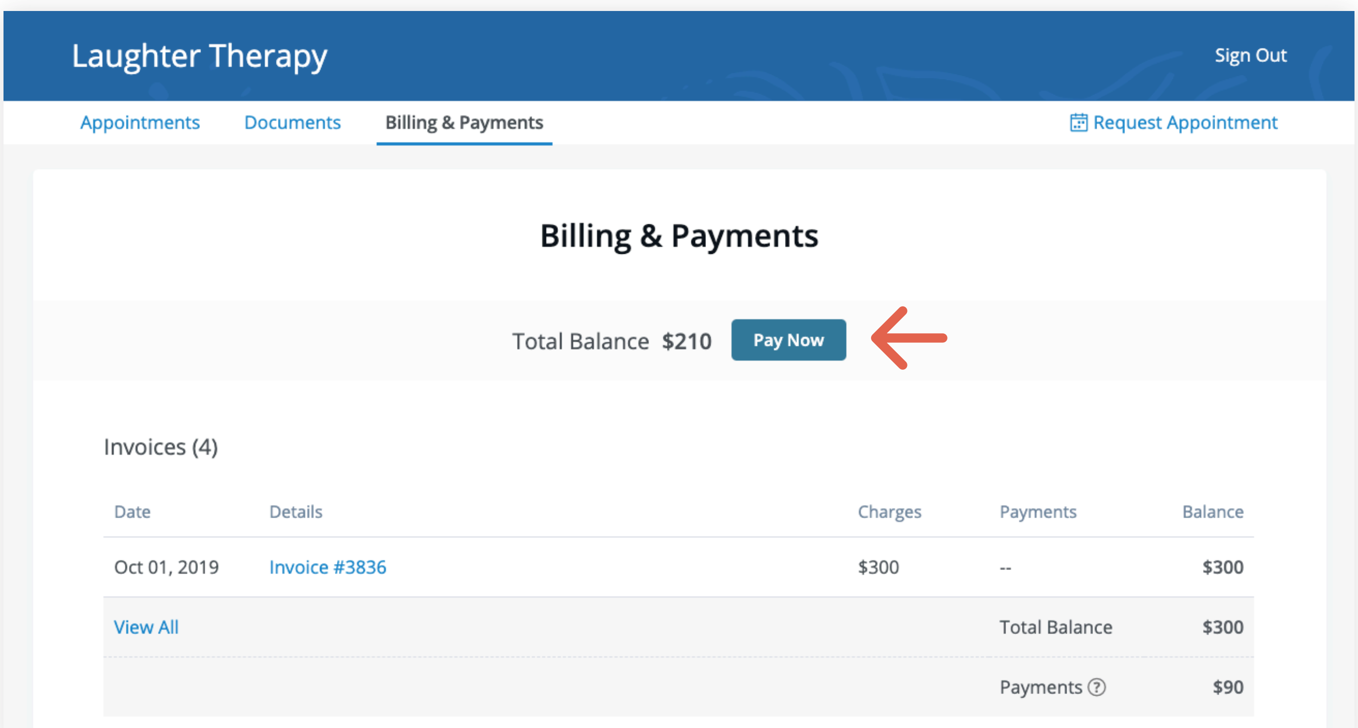
TIP: Once you open a document, you can click Print to print it or Download PDF to download it to your computer.



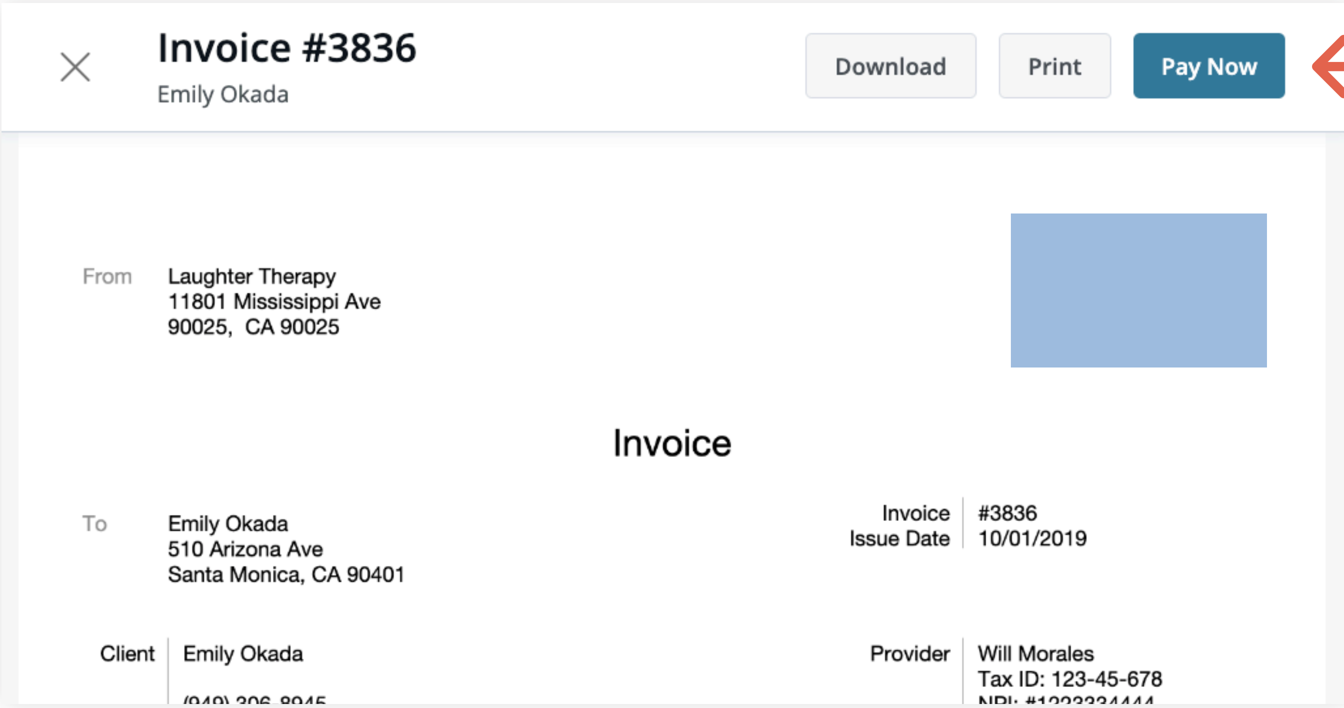
MAKING PAYMENTS

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.



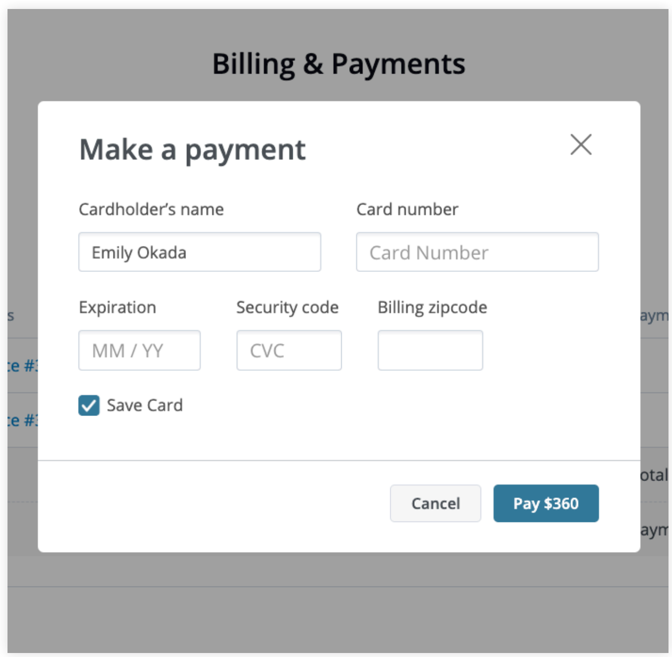
2. To pay a specific invoice, **open the invoice** and click **Pay Now** at the top.



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

1. Enter the cardholder's name, card info, and billing zipcode.
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.