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 pay your session fees.

SECTIONS:

1. How do I log in?

2. Troubleshooting

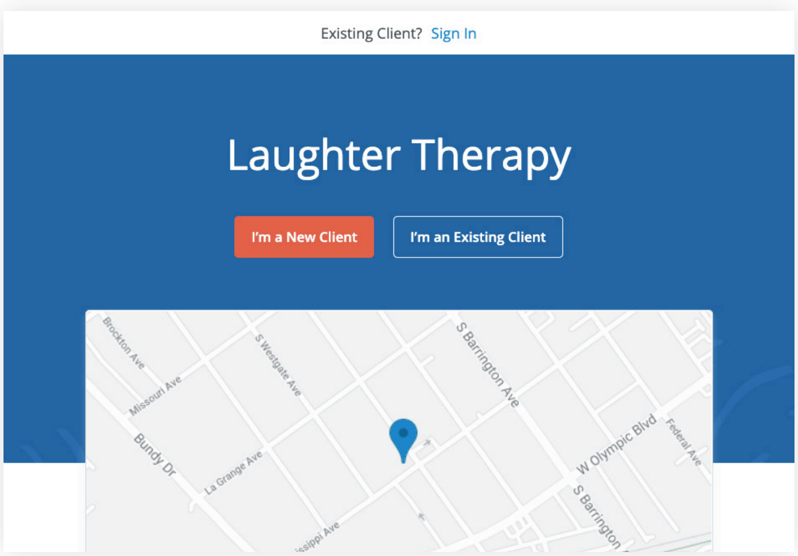
3. Online booking

4. Documents and forms

HOW DO I LOG IN?

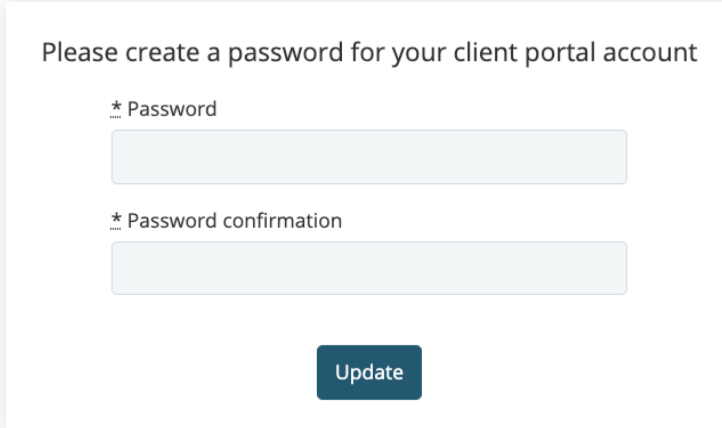
Before logging into the Client Portal for the first time, you'll receive a welcome email from your clinician that looks like this:

> Hi Alice,
>
> Your Appointment on Monday, September 30th at 11:15 AM (PDT) with Will Morales has been confirmed.
>
> 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 click on this secure link below and login with the following:
>
> Username: your email address
>
> Password: 9029
>
> Click here to login to the client portal



1. Click on the link the the **welcome email**.
2. You will arrive at the Welcome Page, where you can enter your **Username and Password**.
3. Enter your email address in the Email Address field and your **4-digit PIN number** from the email in the Password field. This is your temporary password.

4. You'll then be prompted to **create a password.**
5. Enter a new password, then re-enter it, and click Update. This will be your password moving forward, each time you access the Client Portal. **Be sure to remember it**!
6. You are now logged in.



You will now be able to log in to the Client Portal at any time, using your email address as your username and the password that you created above.

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

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. If your clinician re-sends you an invitation, be sure to use the latest **4-digit passcode** to log in. Some email providers will collapse the emails into the same thread. Be sure to select the email that you received most recently. If you're not sure what your current 4-digit passcode is, your clinician can provide that information for you.
3. 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.
4. 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.
5. The same email can't be used for more than one portal account for the same clinician.

TIP: You only use the 4-digit passcode once. For each subsequent login, you'll use the new (8 or more digit) password that you created.

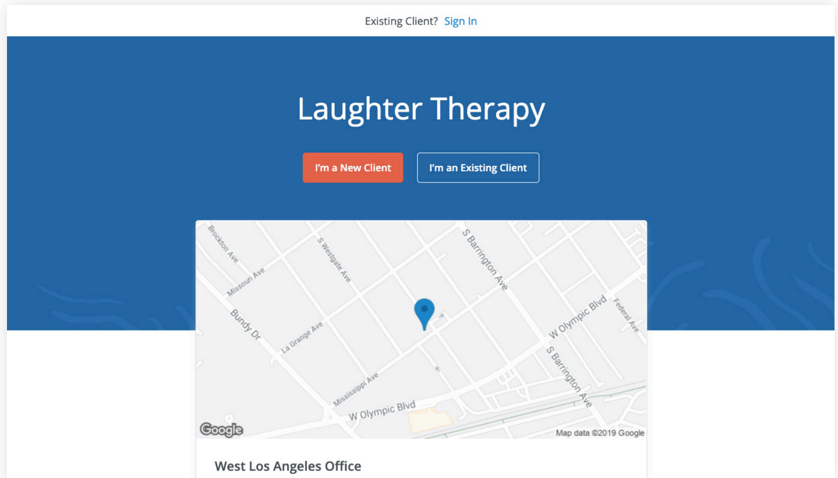
6. You can recover your password by clicking **"Forgot your password?"** below the Log in button. You'll be asked to enter your email address, and then you'll receive a password recovery email. Be sure to use the same email address that you normally use to log into your Client Portal, and check your spam.

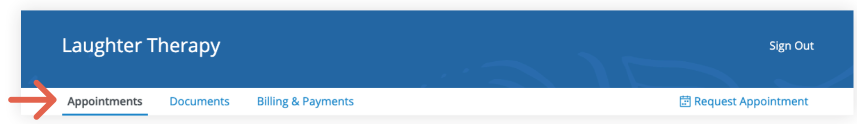
ONLINE BOOKING

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).

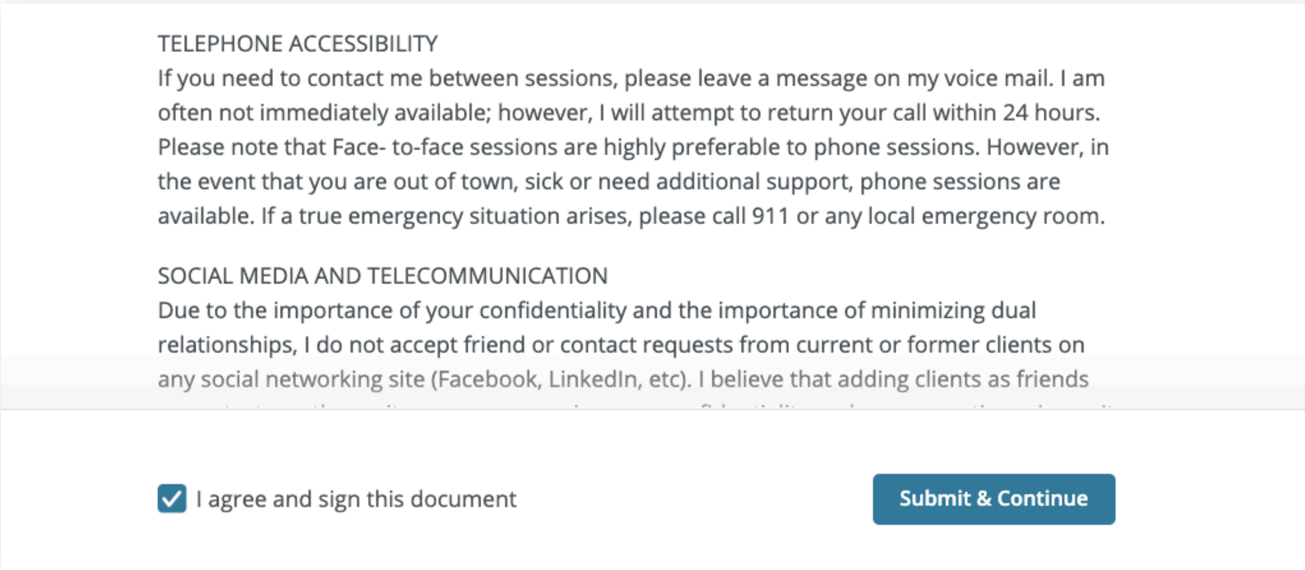




DOCUMENTS AND FORMS

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.



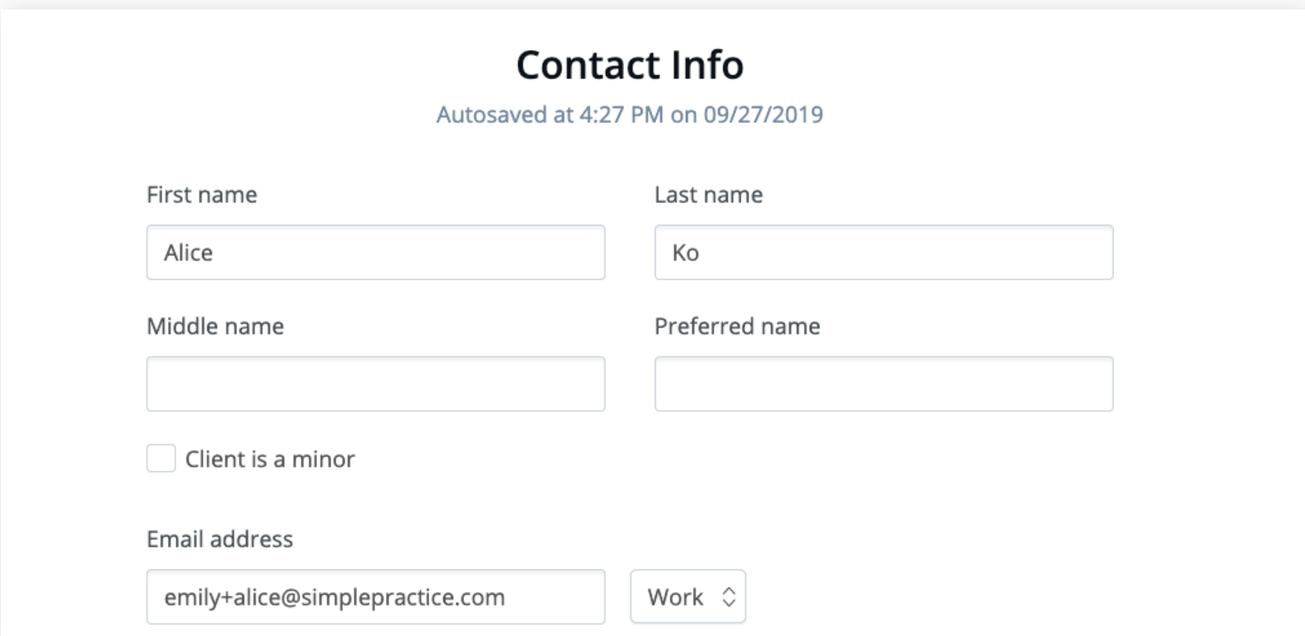
TELEPHONE ACCESSIBILITY
If you need to contact me between sessions, please leave a message on my voice mail. I am often not immediately available; however, I will attempt to return your call within 24 hours. Please note that Face- to-face sessions are highly preferable to phone sessions. However, in 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

Congratulations!

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

GETTING STARTED GUIDE

Secure Messaging

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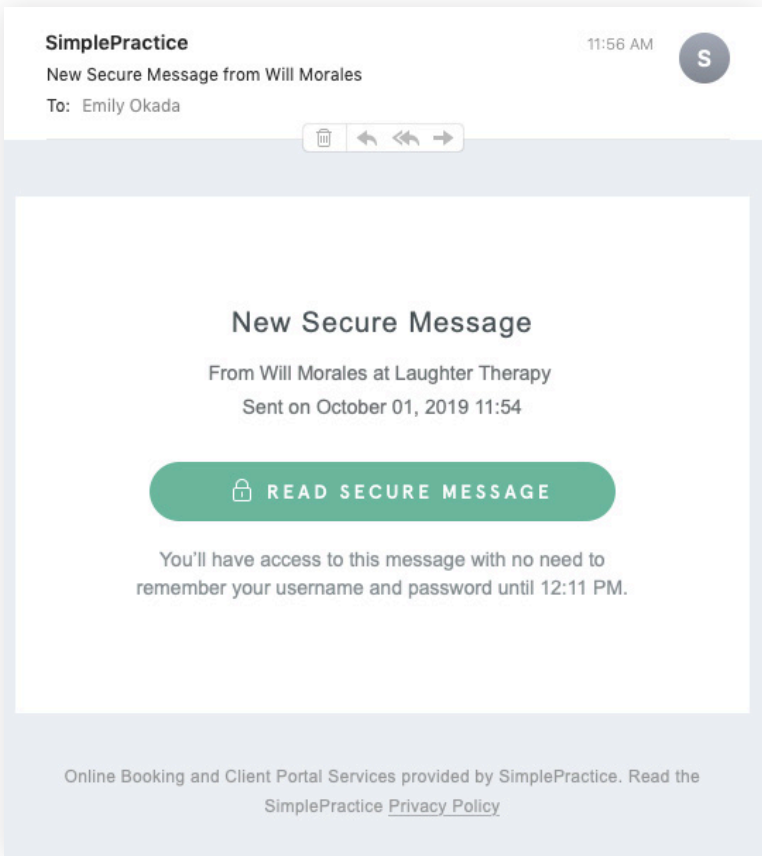
Secure Messaging lets you send and receive messages directly with your clinician. Reschedule your session or ask a question from your phone.

SECTIONS:

MESSAGE NOTIFICATIONS

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

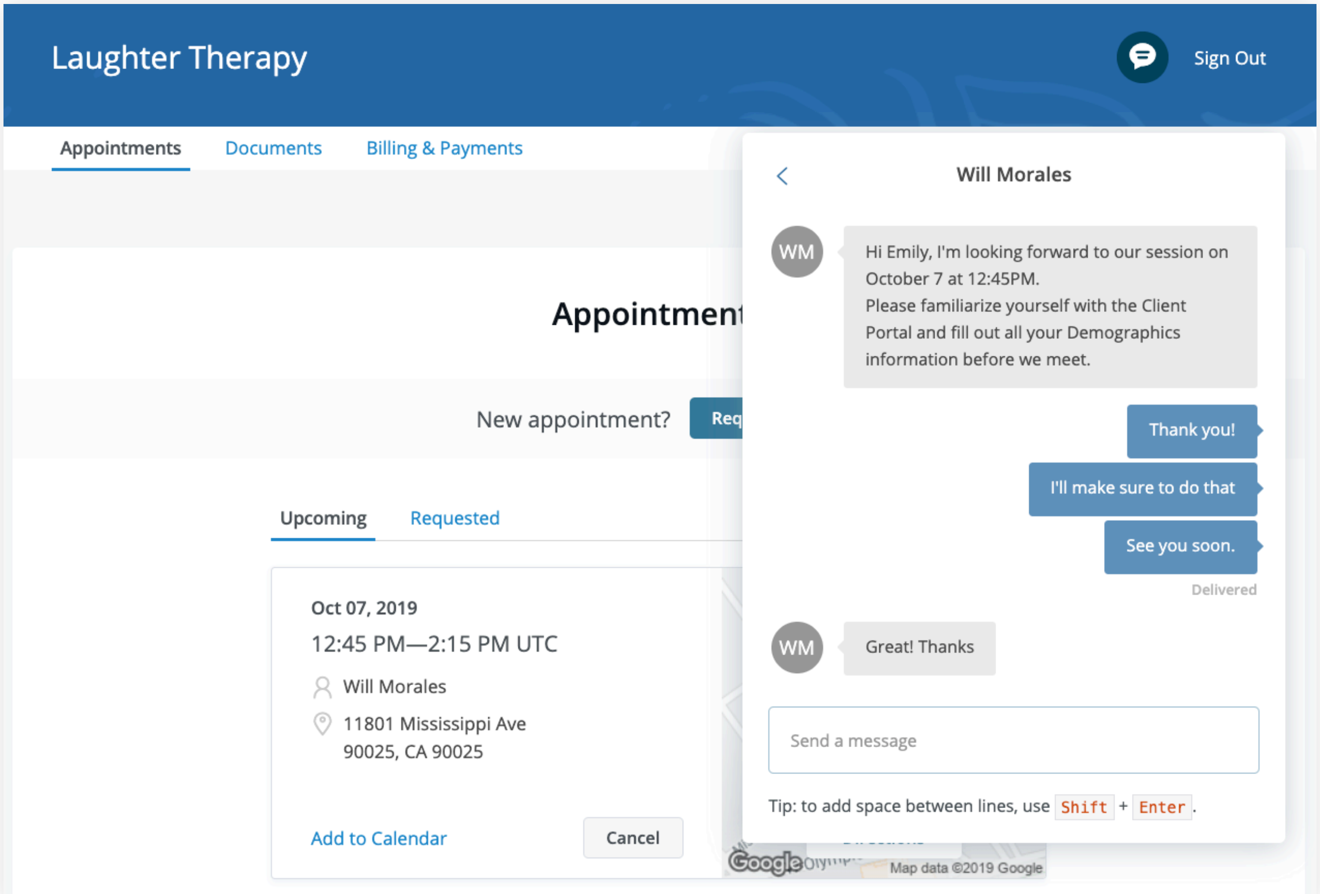
1. Click on the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**. 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

with simplepractice

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

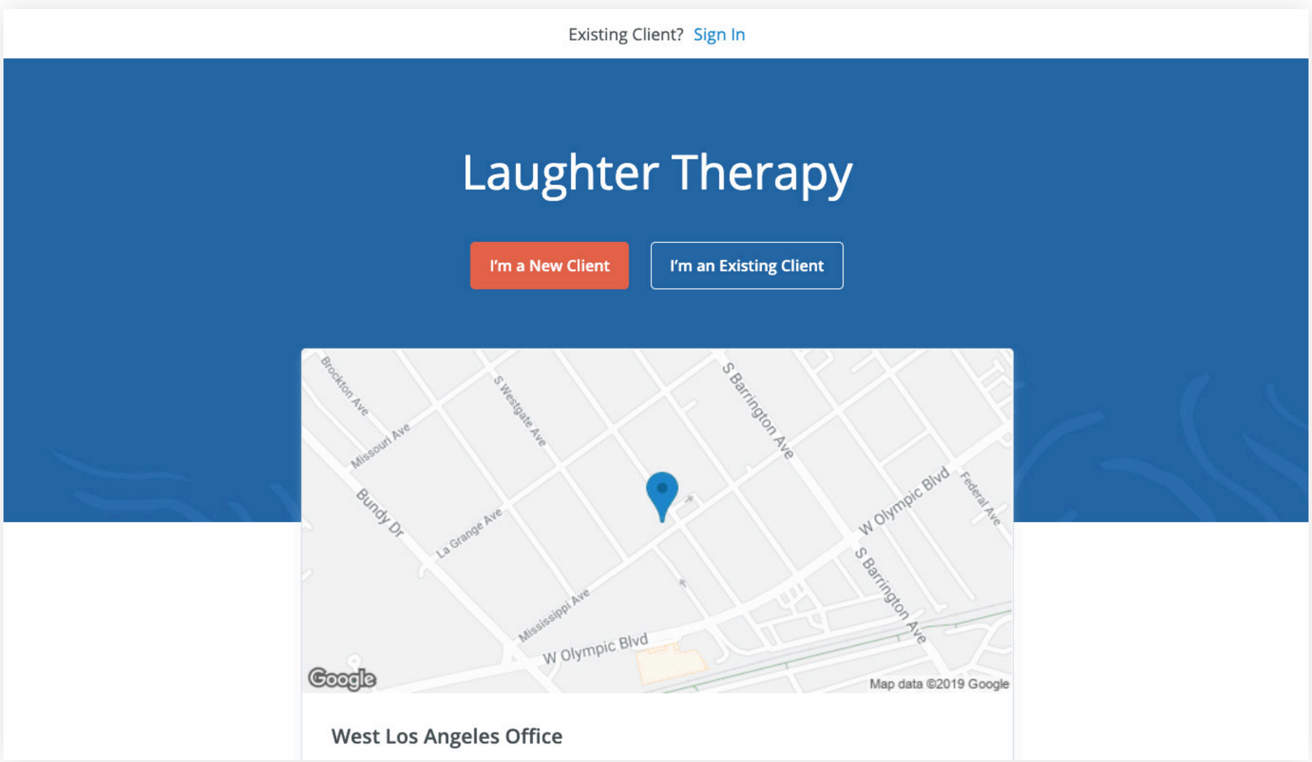
SECTIONS:

1. Request a session
2. Cancelling requests

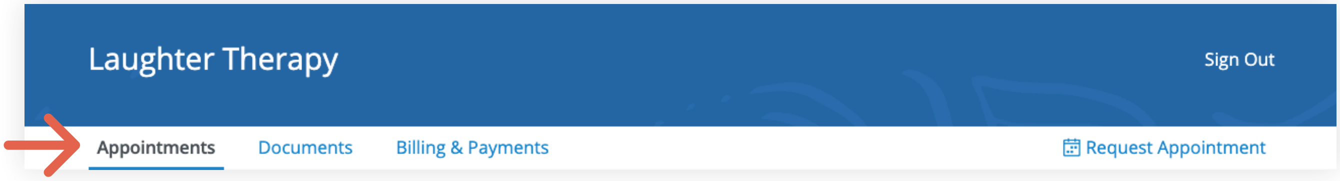
REQUEST A SESSION

The following steps will show you how to request appointments.

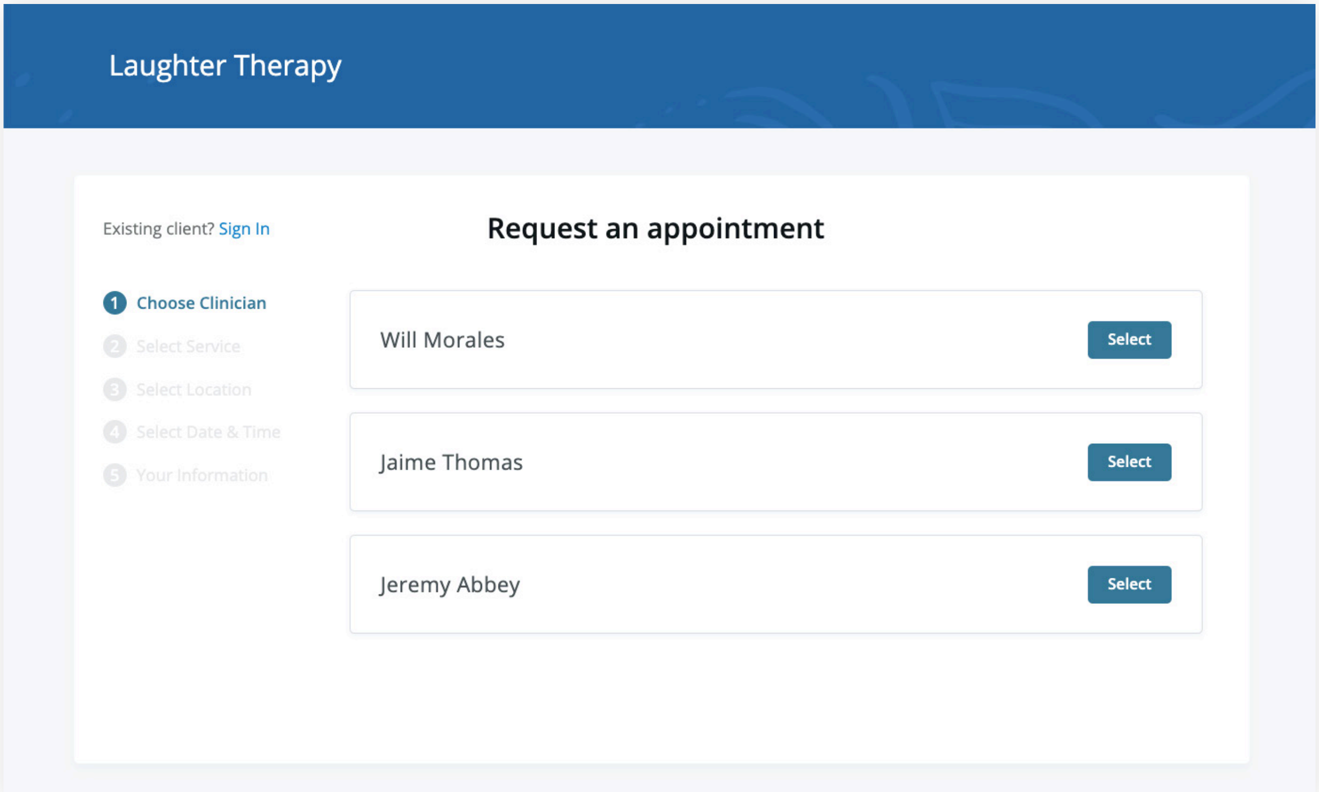
1. Go to your clinician's **Client Portal** and click **Existing Client** to log in. (The New Client button is only for clients who have never logged into the Client Portal before).



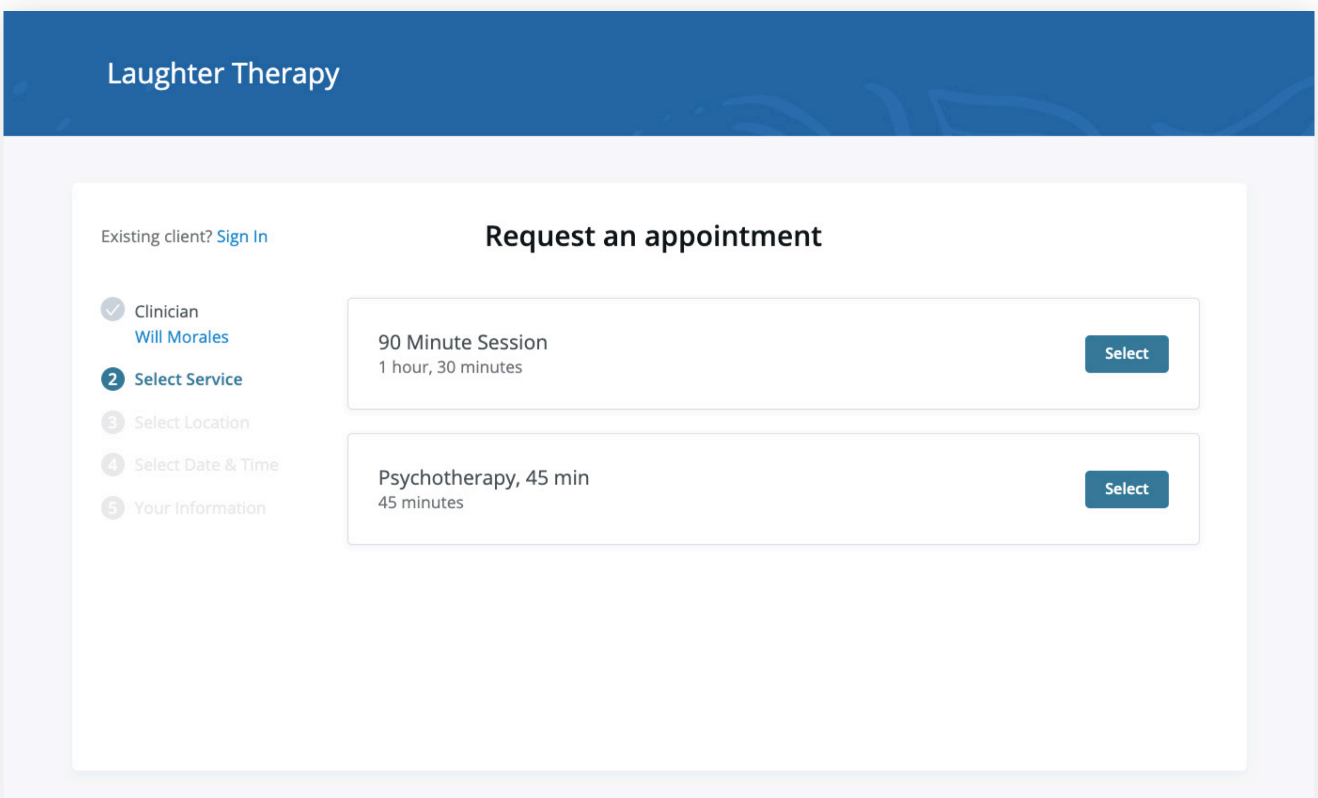
2. Navigate to the **Appointments tab** (This may already be selected by default).



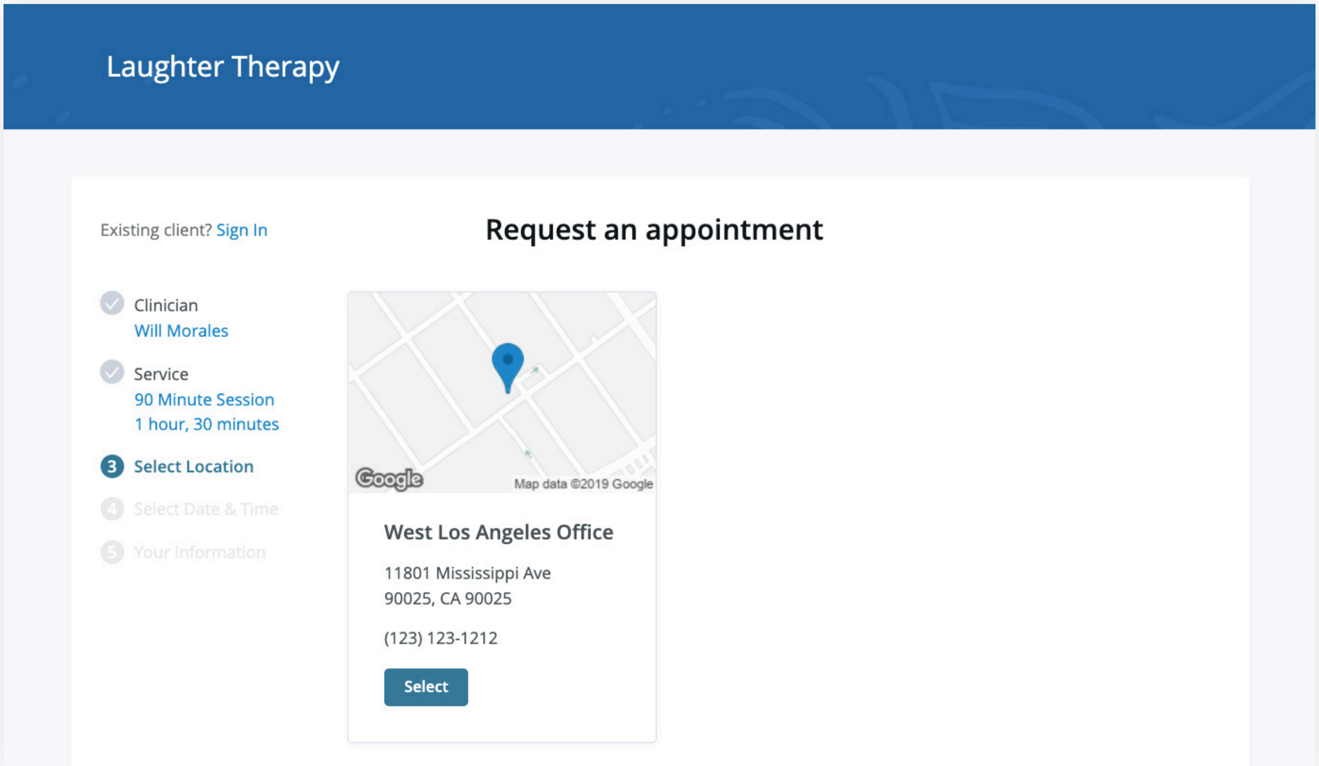
3. Select your **clinician** (if there are multiples).



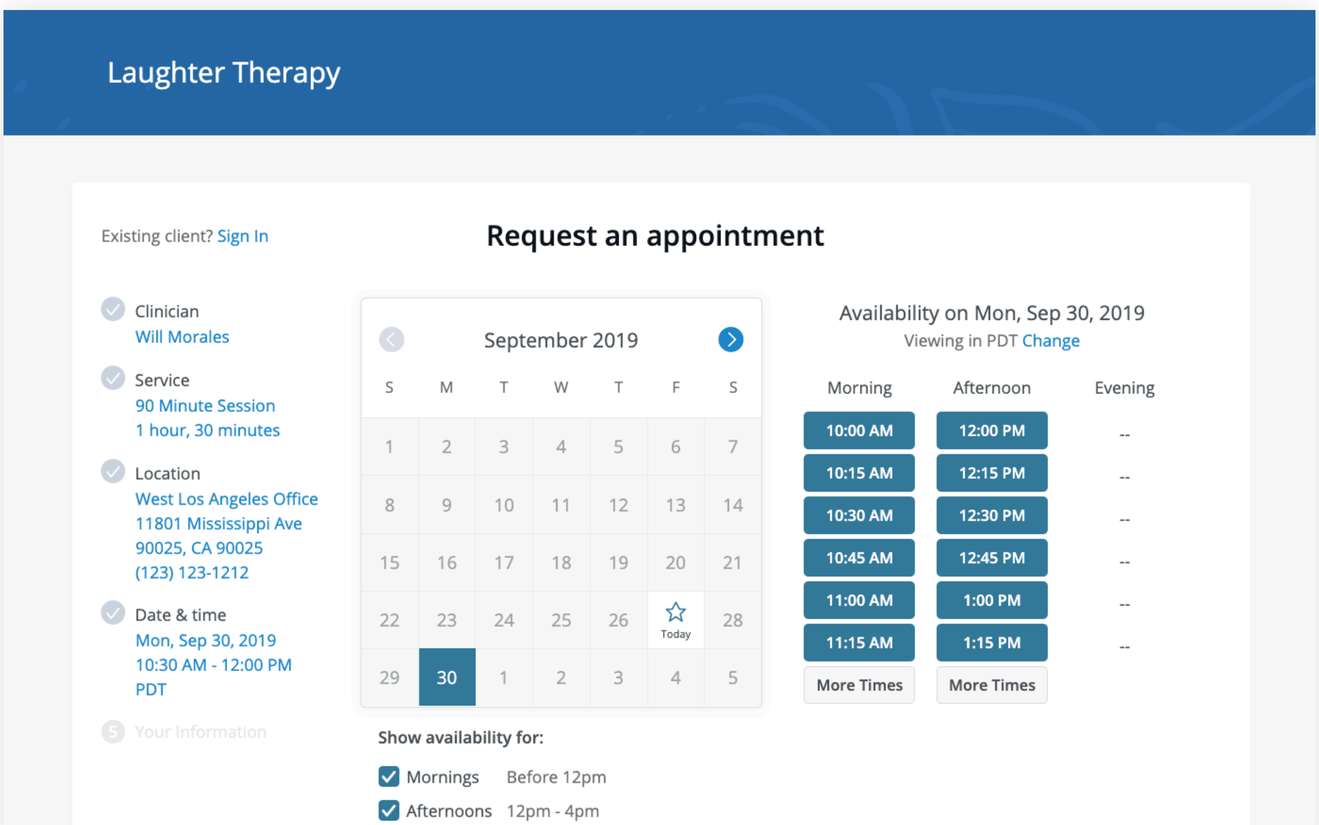
4. Select your **service**. What type of appointments do you see your clinician for?



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

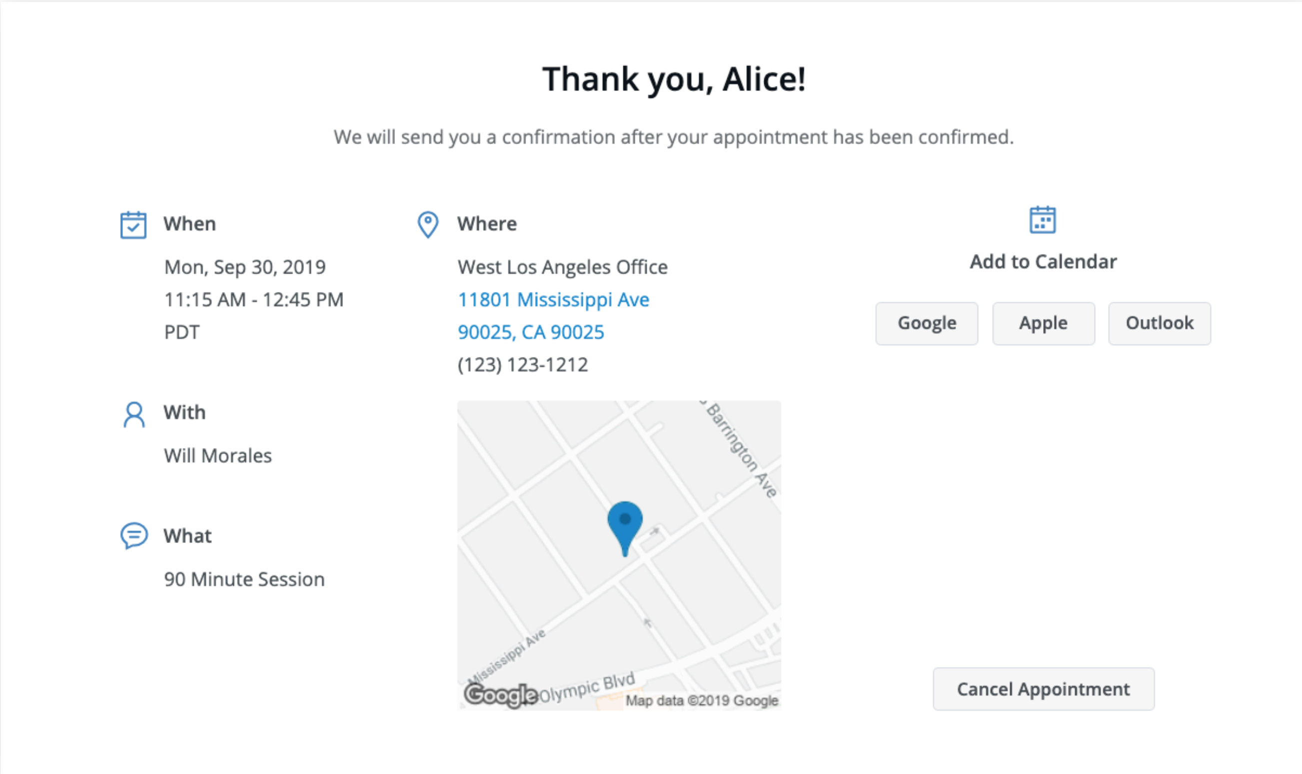


6. Click on the **date and time** that you'd like.

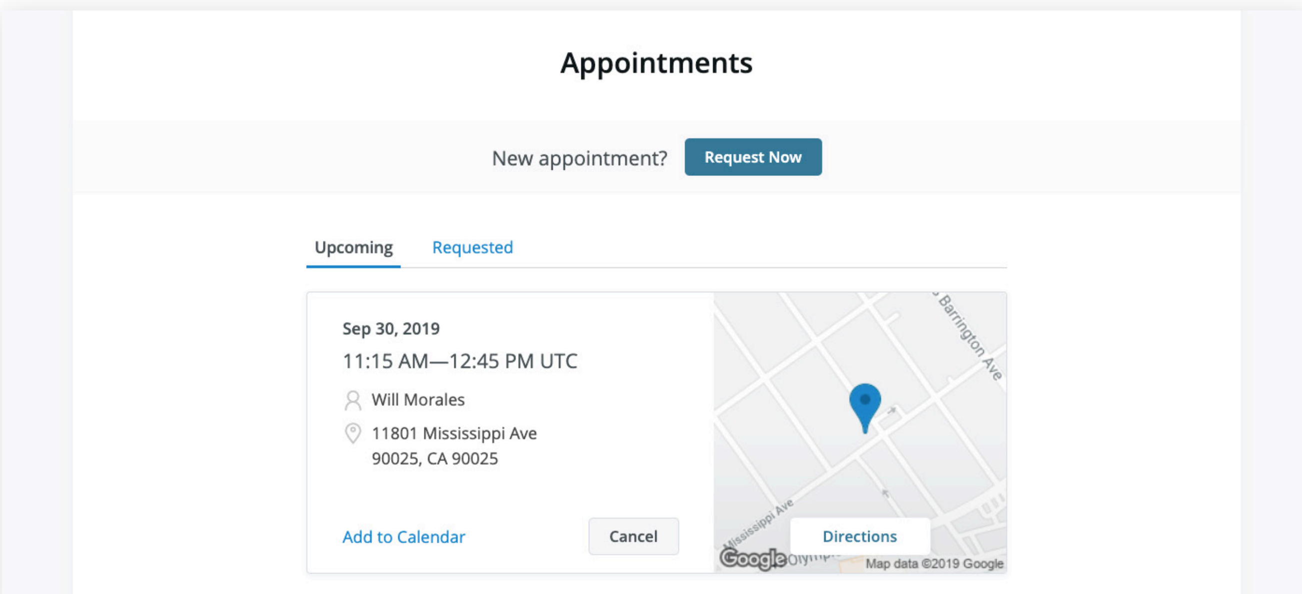


7. Your appointment request has been **sent** to your clinician (Your clinician will need to accept your request).

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

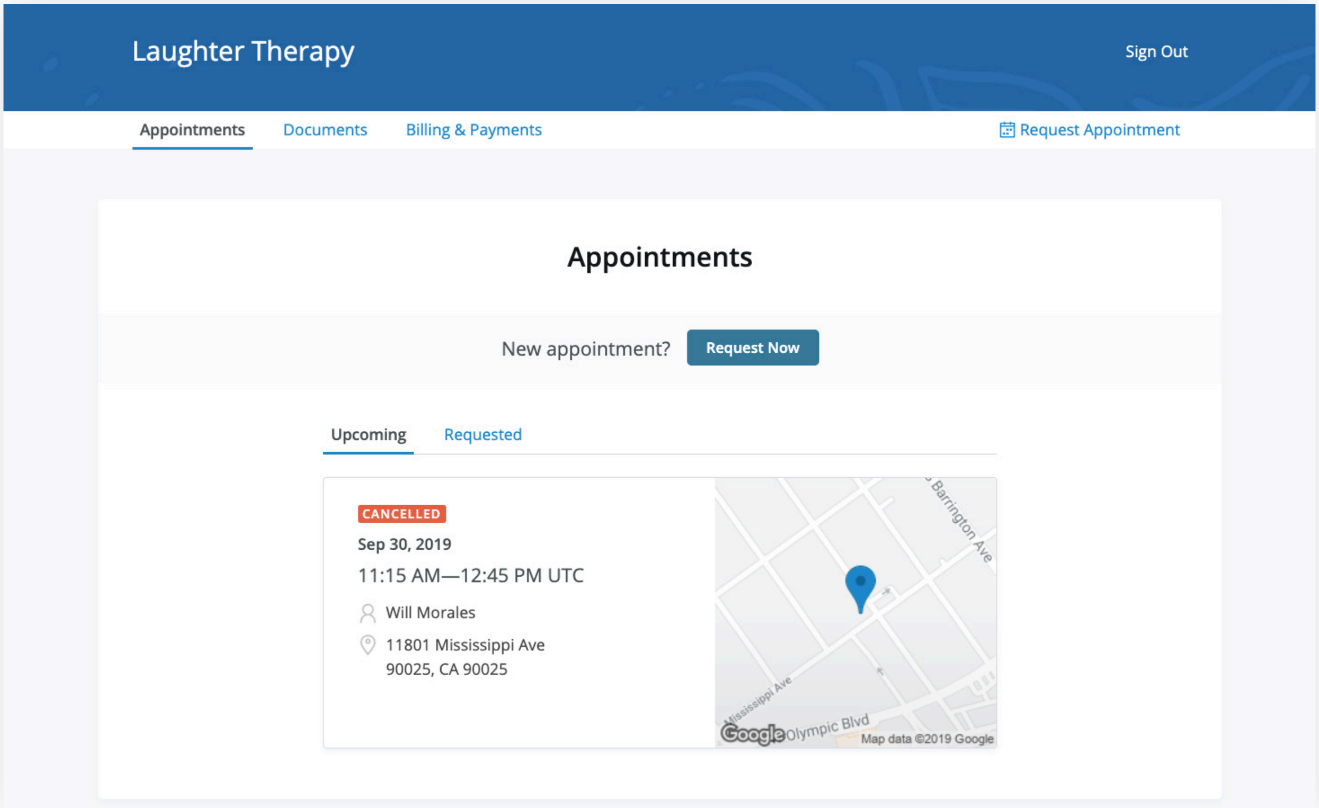


8. If your request is accepted, you'll receive an **email** confirming the session.
9. If they cannot see you at that time, you'll receive a link to reschedule. Click it to go back to your Client Portal and request a new session.



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

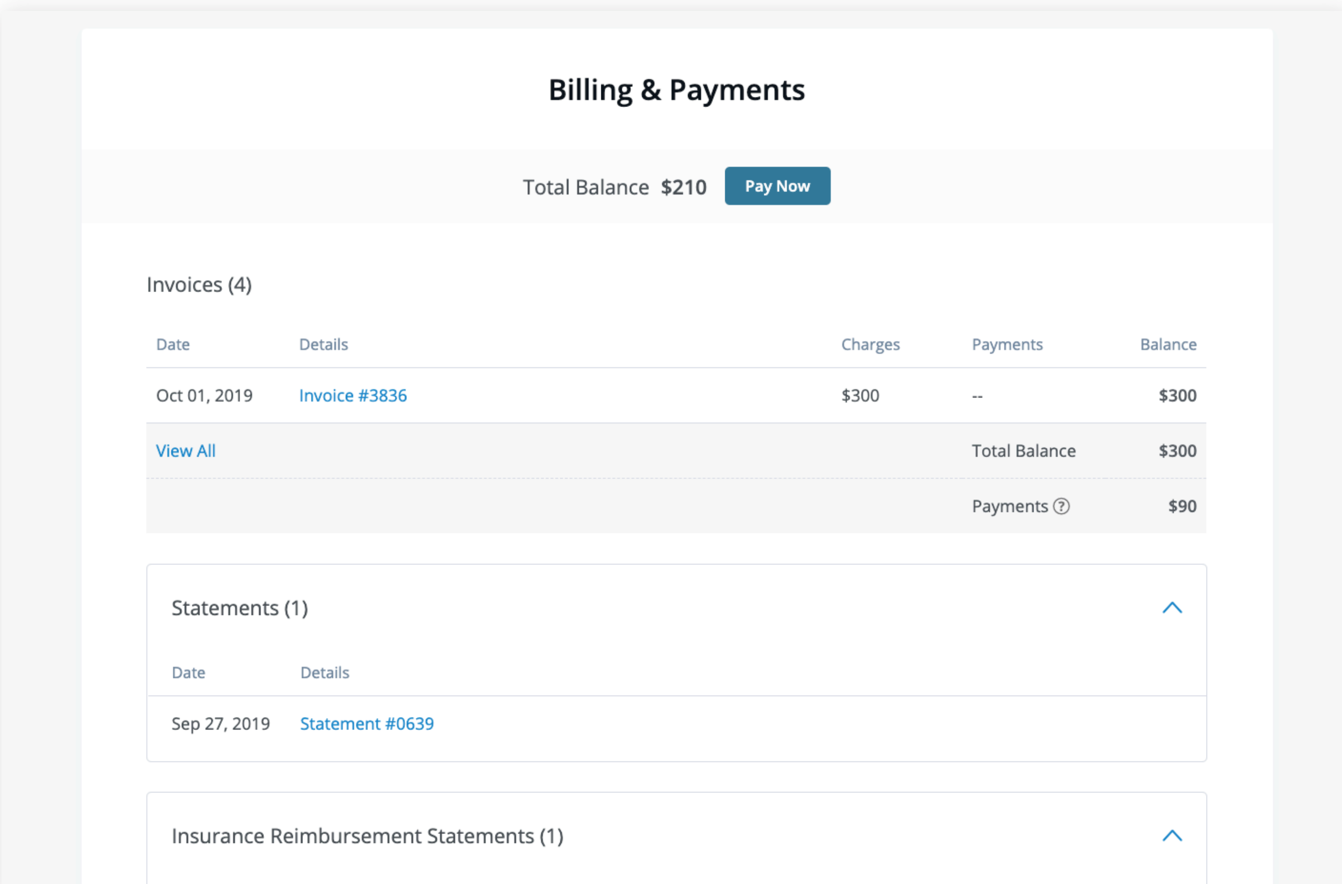
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

SECTIONS:

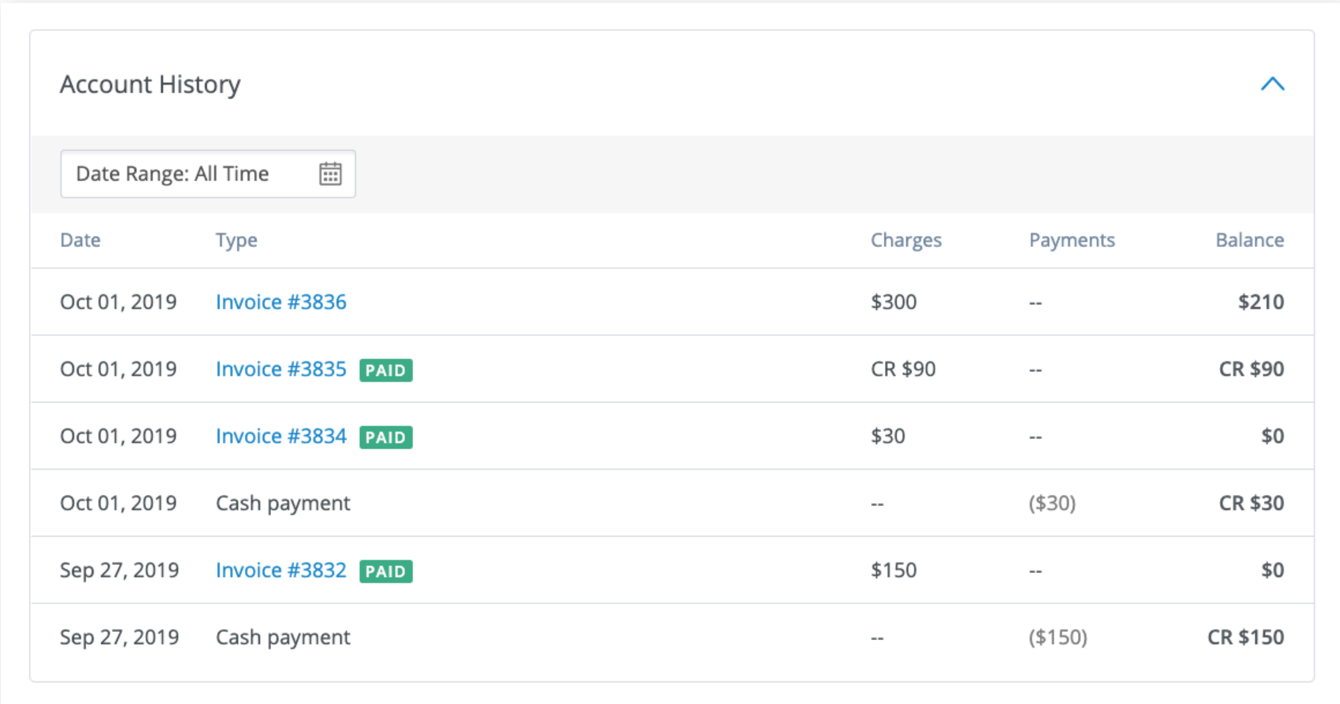
1. Viewing your billing history and documents
2. Making payments

VIEWING YOUR BILLING HISTORY AND DOCUMENTS

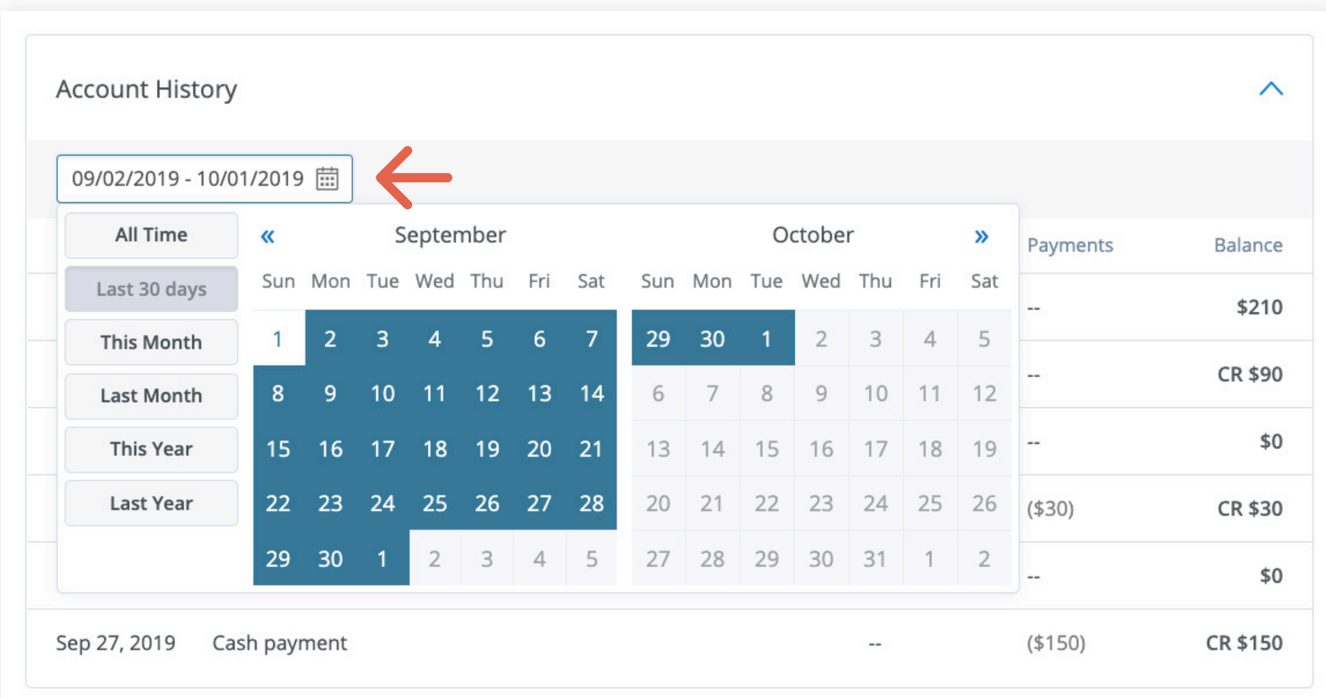
1. After logging into the Client Portal, click **Billing & Payments** to see your billing page. This page provides you with an overview of your recent payment history and access to your billing documents.
2. You'll see three sections for **Invoices**, **Statements**, and **Insurance Reimbursement Statements**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



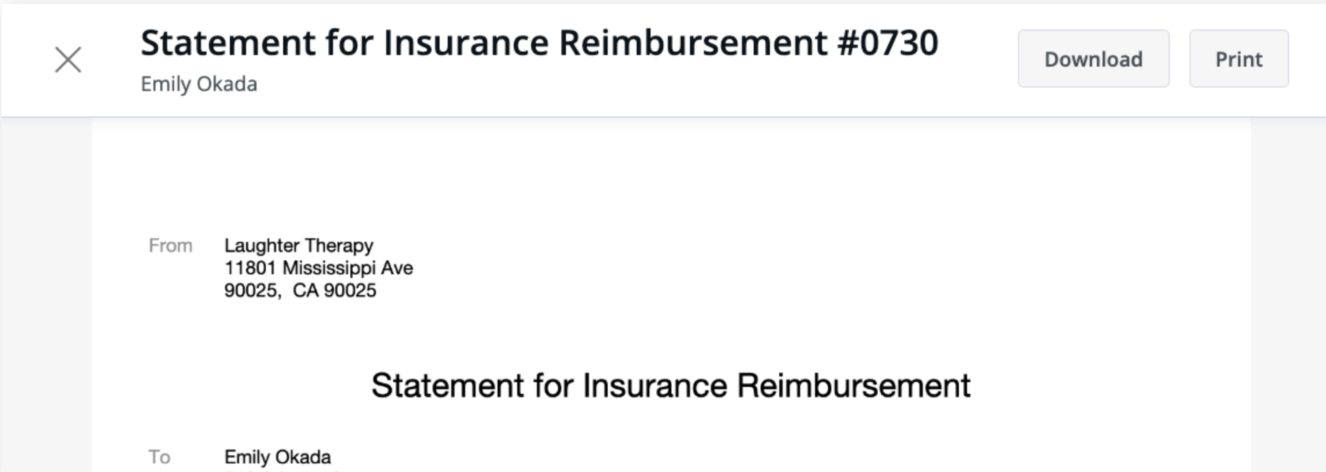
3. At the very bottom there's a section for **Account History** that shows your most recent sessions and payments.



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



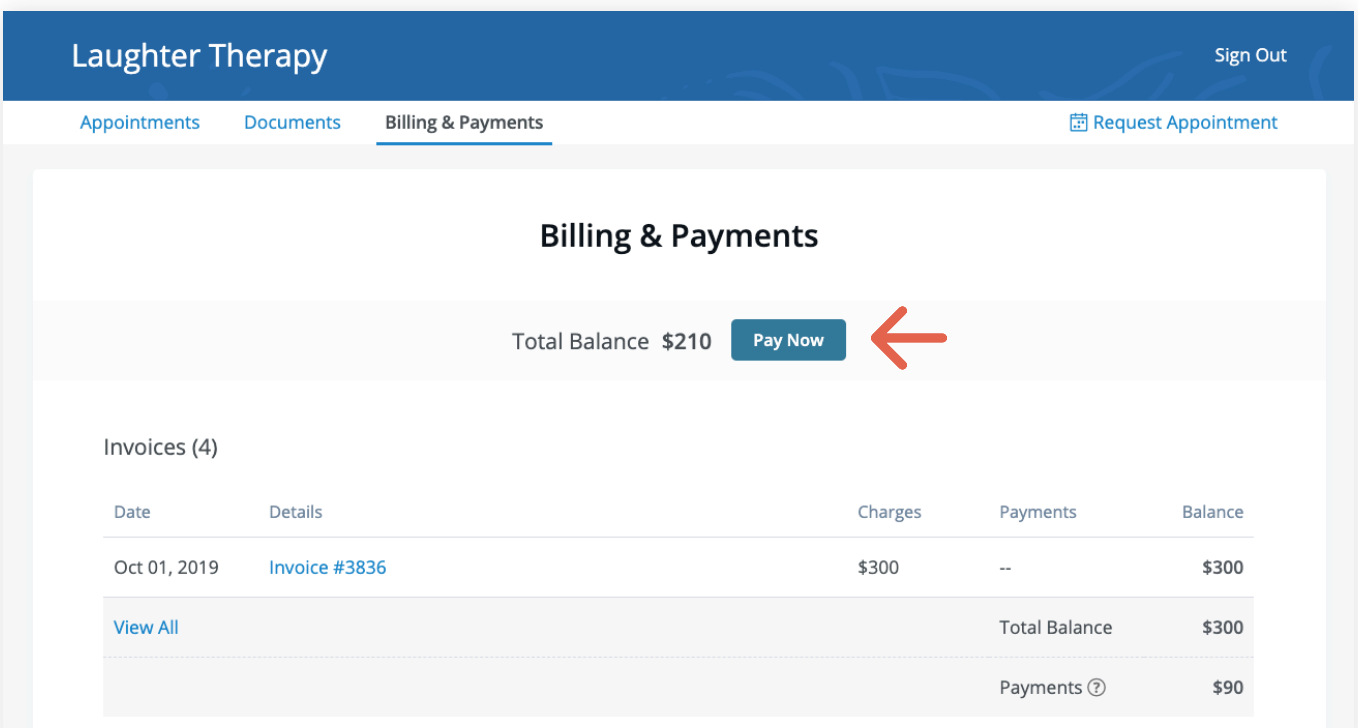
TIP: Once you open a document, you can click Print to print it or Download PDF to download it to your computer.



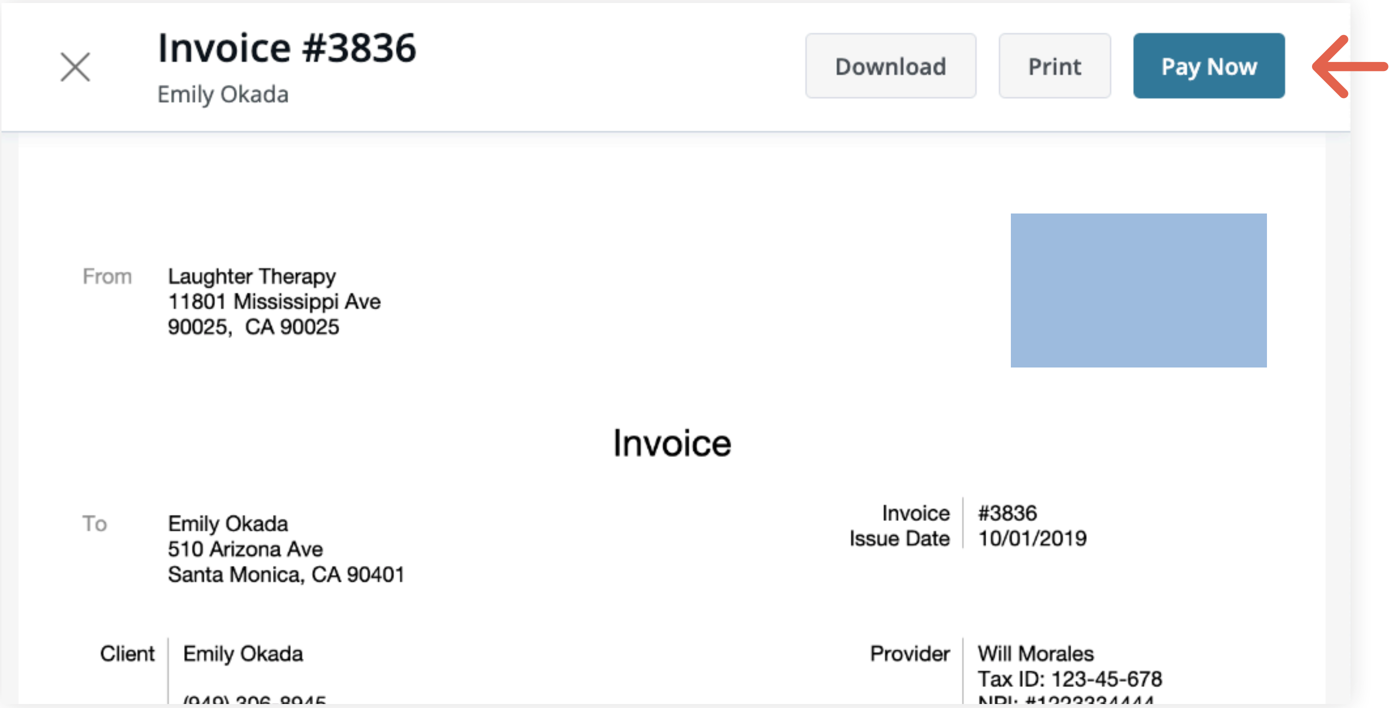
MAKING PAYMENTS

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.



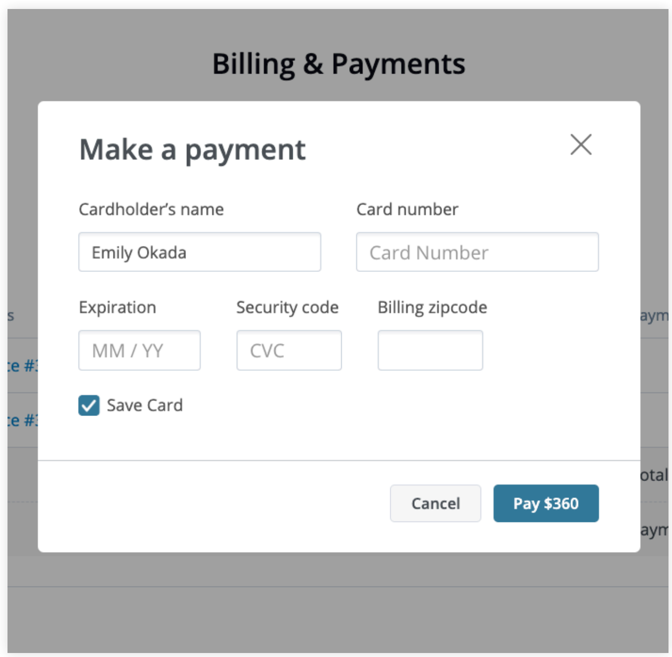
2. To pay a specific invoice, **open the invoice** and click **Pay Now** at the top.



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

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