



# Complete Guide to the Client Portal

# The Client Portal

with  simplepractice

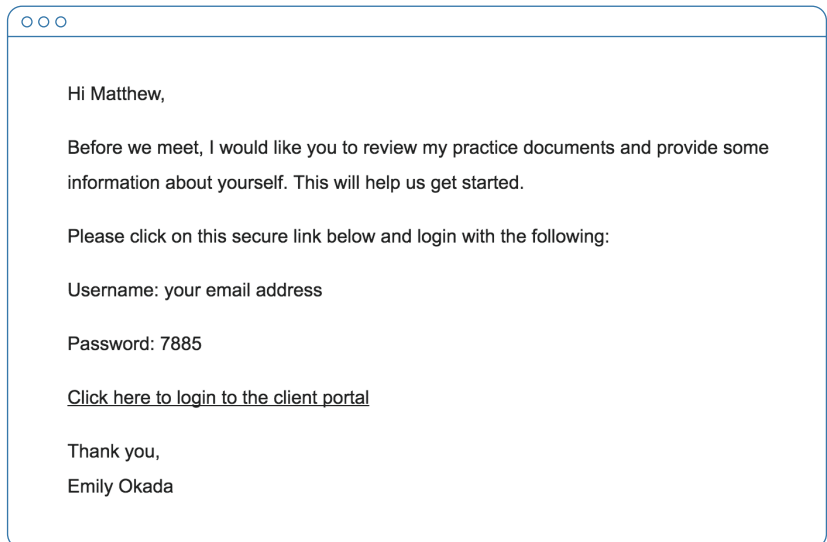
The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your session fees.

## SECTIONS:

1. How do I log in?
2. Troubleshooting
3. Online booking
4. Documents and forms

## 1. 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 Matthew,

Before we meet, I would like you to review my practice documents and provide some information about yourself. This will help us get started.

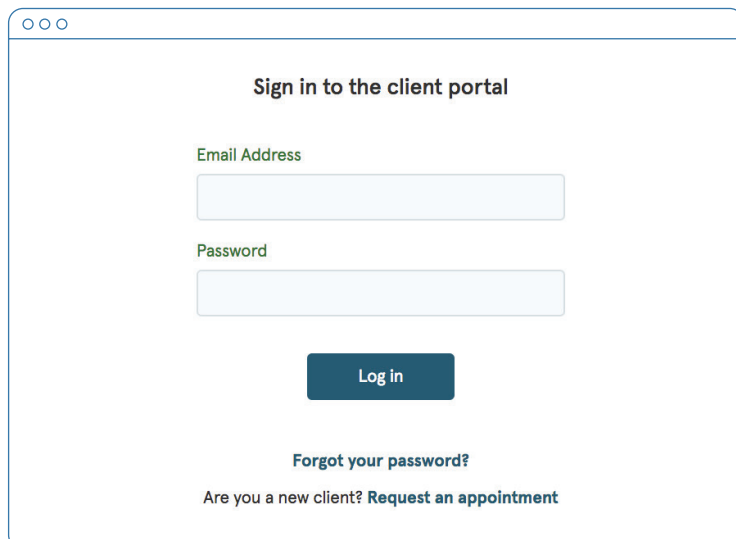
Please click on this secure link below and login with the following:

Username: your email address

Password: 7885

[Click here to login to the client portal](#)

Thank you,  
Emily Okada



Sign in to the client portal

Email Address

Password

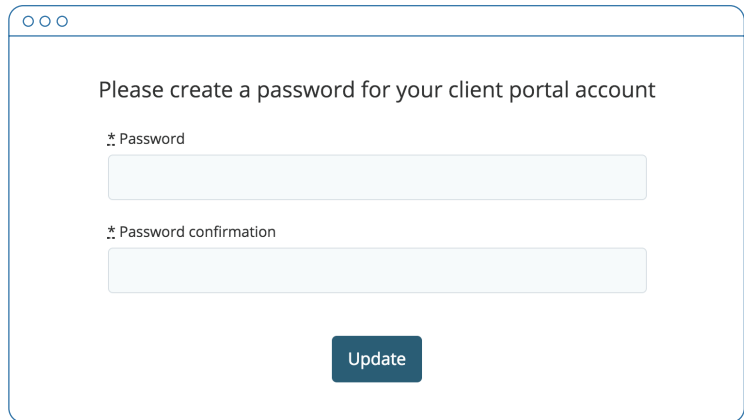
Log in

[Forgot your password?](#)

Are you a new client? [Request an appointment](#)

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 write it down!
6. You are now logged in.



Please create a password for your client portal account

\* Password

\* Password confirmation

Update

You will now be able to login 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.

## 2. 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.  
*Note: 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 info 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 email address 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

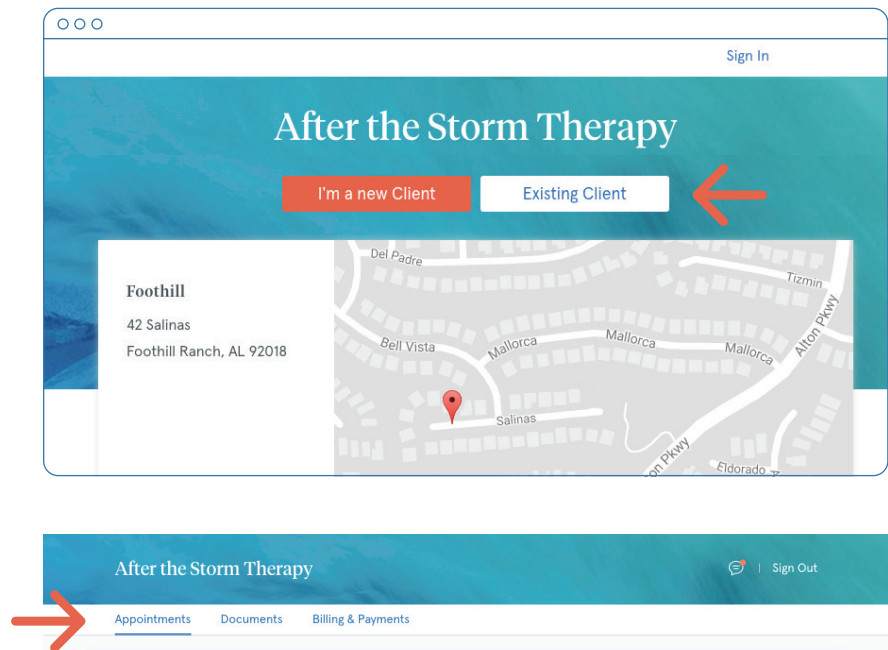
### 3. Online Booking

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.

#### GETTING STARTED

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).



### 4. Documents and Forms

The first time you log into the Client Portal, you'll see a welcome message from your clinician. Click **Get Started** to start filling out the forms that your clinician shared with you.

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.

Your clinician may also share some forms with you. Fill out as many fields as you can, then click **Submit**.

After submitting, the you'll see a confirmation page where you can **Make Corrections** or **Submit** the information:

Click **Submit**.



**Congratulations!**

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

GETTING STARTED GUIDE: FOR CLIENTS

# Secure Messaging

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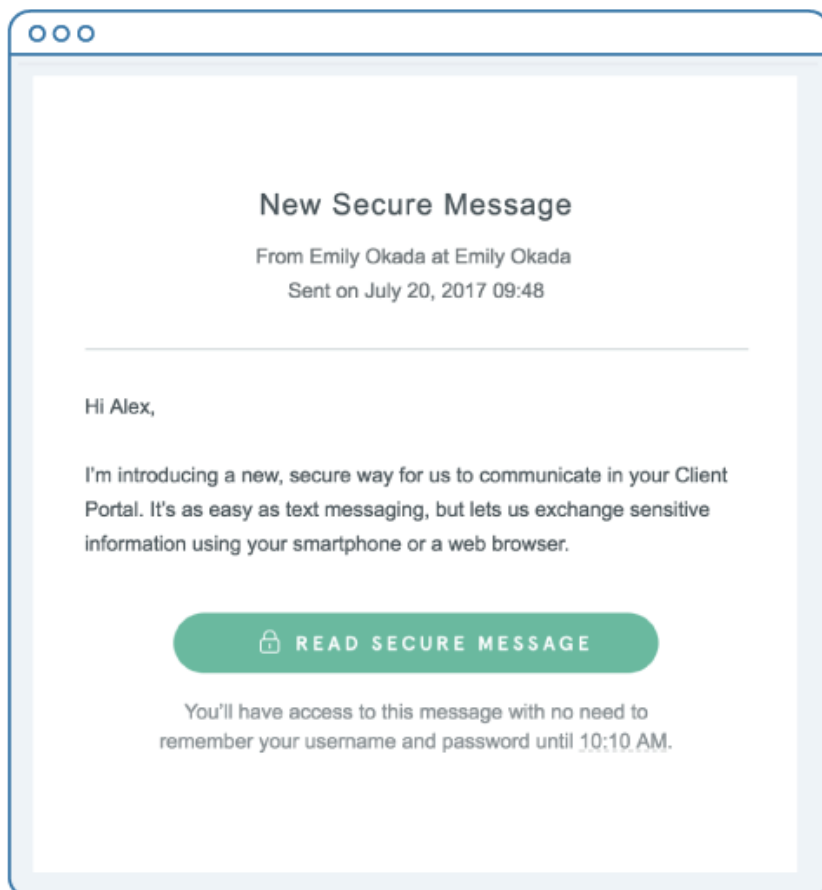
Secure Messaging lets you send and receive messages directly with your clinician. Reschedule your session or ask your therapist a question right from your phone!

## WHY USE SECURE MESSAGING?

- Keep all your therapy-related communication in the same place.
- It's as easy as texting, and you can do it from your phone.
- All of your messages are 100% private and secure.

## HOW DOES IT WORK?

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

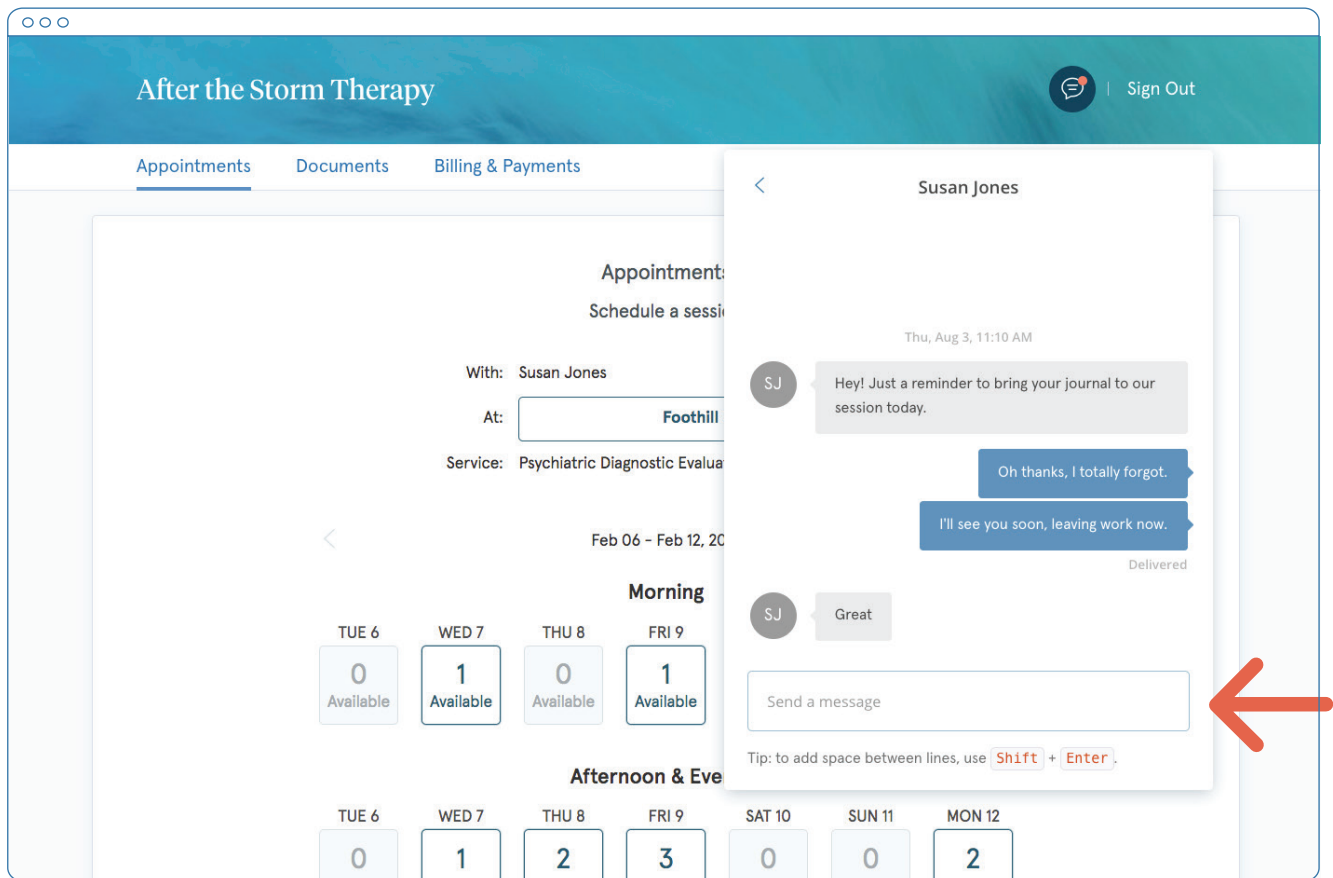


1. Click on the **Read Secure Message** button to access your message. Your link will be active for 15 minutes from the time the email is sent. During this time, you can view your message directly after you click the link.

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

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.

3. 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.

You can click on the **Secure Message icon** at any time to open the messaging widget and send a message to your clinician.




**Congratulations!**

You're now ready to start sending Secure Messages through your Client Portal.

# GETTING STARTED GUIDE: FOR CLIENTS

# Online Booking

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

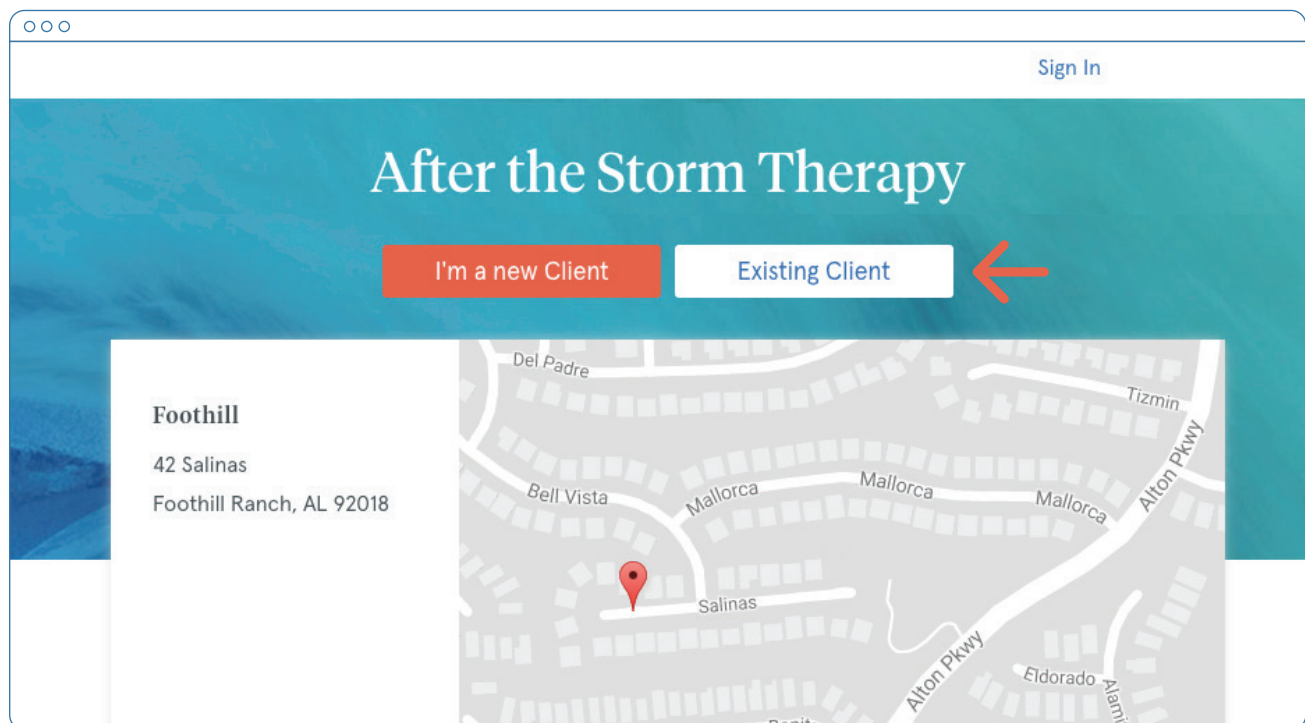
## SECTIONS:

1. Request a session
2. Cancelling requests

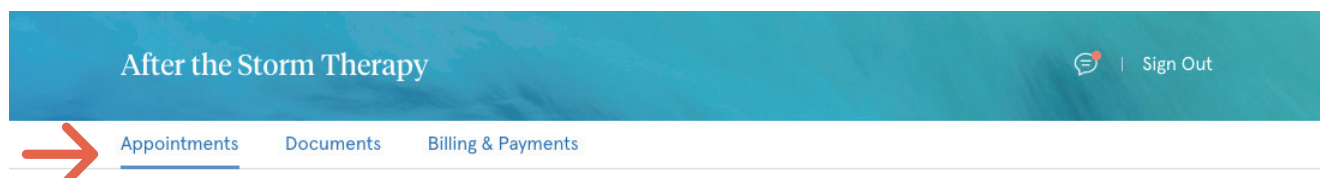
## REQUEST A SESSION

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 after you log in).

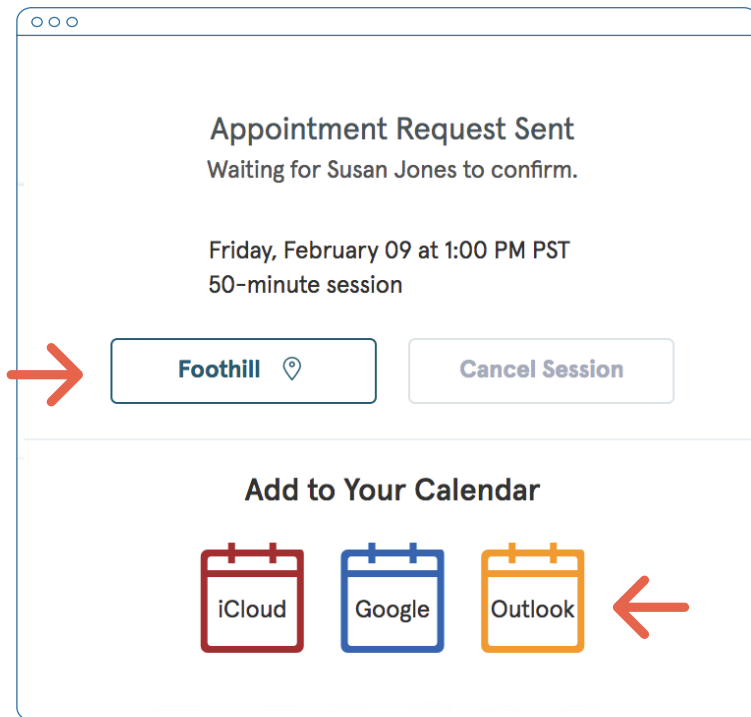




3. Select your **clinician** (if there are multiples) and your preferred **office location** from the dropdown menus.
4. Select your **service**. What type of appointments do you see your clinician for?
5. Click one of the **available** boxes to see specific times. You'll see that these boxes are split into morning (up until 12 noon), and afternoon & evening (12pm onwards). Clicking the arrows on the top left and right will let you move from week to week.
6. Click on the **time** that you'd like to request.

Note: To go back to the previous screen with all of the days, click the back button (top left).



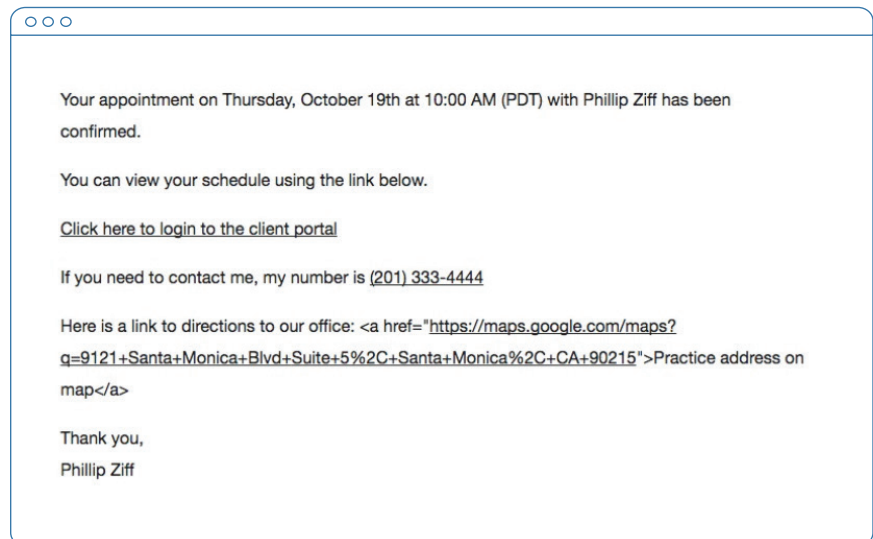


7. Your appointment request is now confirmed.

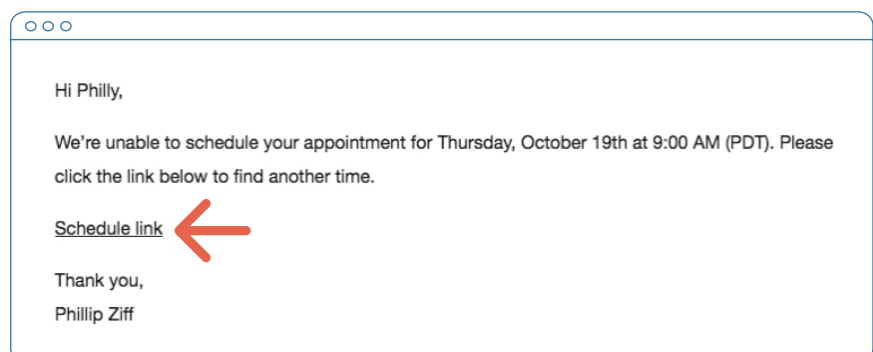
Note: This doesn't mean that the request has been accepted by your clinician yet.

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

8. When your appointment request is accepted, you'll receive an email confirming the session:



9. If they cannot see you at that time, you'll receive an email with a link to reschedule. Click the link 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, below the calendar.

3 Available 1 Available 2 Available 2 Available 0 Available 0 Available 2 Available

Pacific Time (US & Canada) UTC-08:00 (change)

### Upcoming Sessions

Friday, Feb 09 at 09:00 AM PST  
50-minute session  
Pending

Foothill Cancel Session

Friday, Feb 09 at 01:00 PM PST  
50-minute session  
Pending

Foothill Cancel Session

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 page in the Client Portal. Use this page to check the status of your requests, cancel sessions, or schedule new ones!

### Upcoming Sessions

Friday, Feb 09 at 09:00 AM PST  
50-minute session  
Cancelled

Foothill

Friday, Feb 09 at 01:00 PM PST  
50-minute session  
Pending

Foothill Cancel Session



## Congratulations!

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

# Billing & Payments


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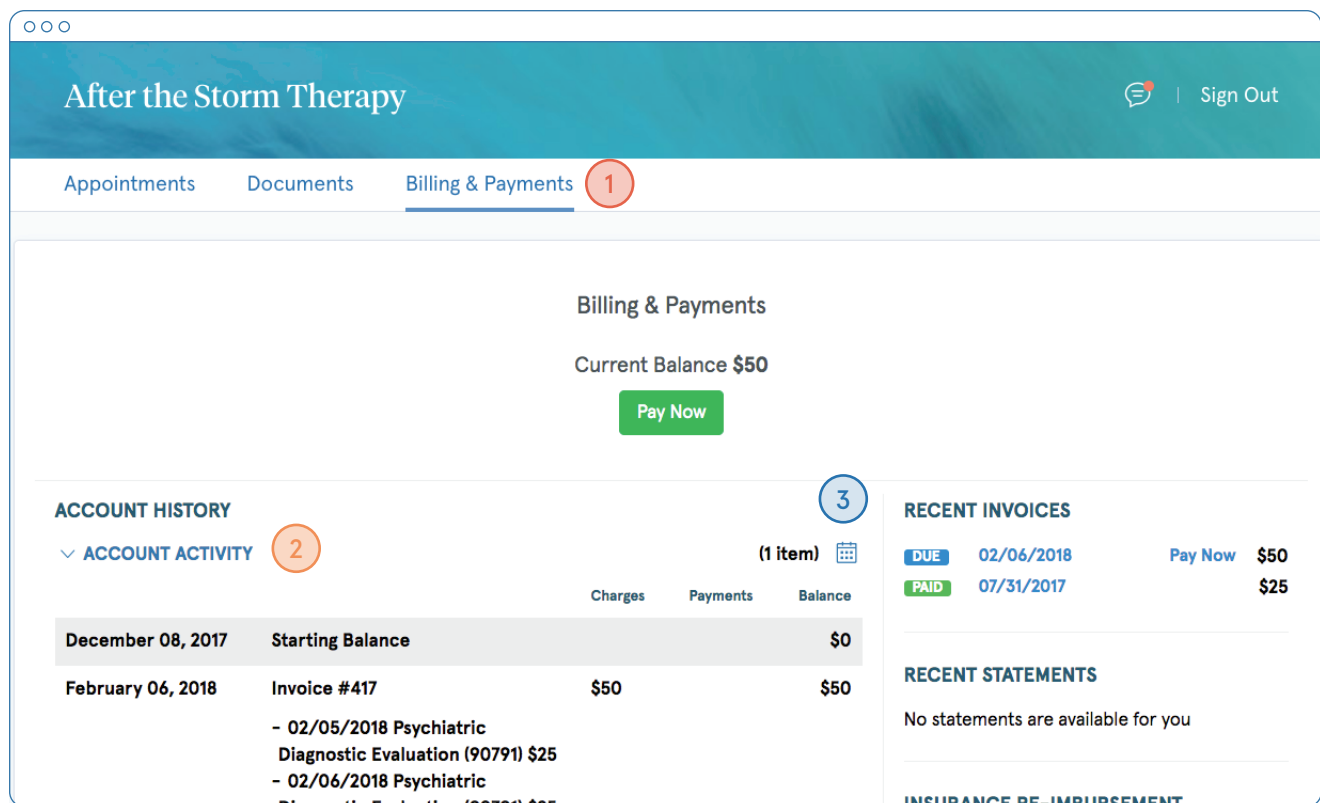
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

## 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. Click **Account Activity** to either hide or show your most recent sessions and payments.
3. You can also **adjust the date range** to display whichever sessions you'd like by clicking the **calendar icon**: 



After the Storm Therapy Sign Out

Appointments Documents **Billing & Payments** 1

### Billing & Payments

Current Balance **\$50**

**Pay Now**

#### ACCOUNT HISTORY

▼ ACCOUNT ACTIVITY 2

		Charges	Payments	Balance
December 08, 2017	Starting Balance			\$0
February 06, 2018	Invoice #417	\$50		\$50
	- 02/05/2018 Psychiatric Diagnostic Evaluation (90791) \$25			
	- 02/06/2018 Psychiatric Diagnostic Evaluation (90791) \$25			

#### RECENT INVOICES

<b>DUE</b>	02/06/2018	Pay Now	\$50
<b>PAID</b>	07/31/2017		\$25

#### RECENT STATEMENTS

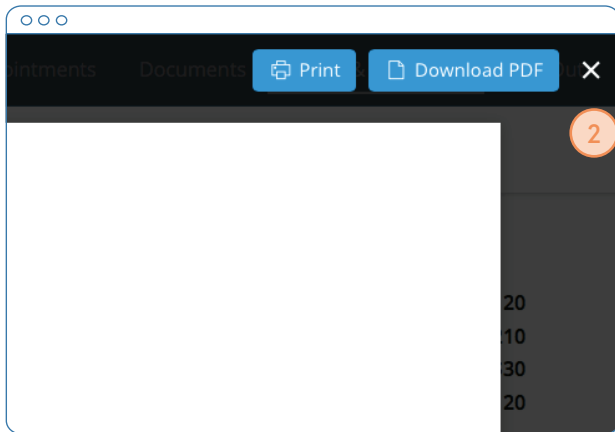
No statements are available for you

#### INSURANCE RE-IMBURSEMENT

3

On the right side, you'll see three sections containing recent invoices, recent statements, and recent insurance reimbursement statements (superbills).

1. Click the **specific date** for a document to open (all light blue dates are clickable links).
2. Click **X in the top, right corner** to close the document (see image below).



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

3. Click **View All** to see all of your past documents in that category.

### RECENT INVOICES

<b>DUE</b>	10/23/2017	<b>1</b>	<b>Pay Now</b>	<b>\$120</b>
<b>PAID</b>	10/23/2017			<b>\$210</b>
<b>PAID</b>	10/10/2017			<b>\$30</b>
<b>PAID</b>	09/29/2017			<b>\$120</b>

**View All** **3**

### RECENT STATEMENTS

October 10, 2017 **1**

September 10, 2017

August 10, 2017

July 10, 2017

**View All** **3**

### INSURANCE RE-IMBURSEMENT STATEMENTS

May 24, 2017 **1**

March 07, 2017

February 10, 2017

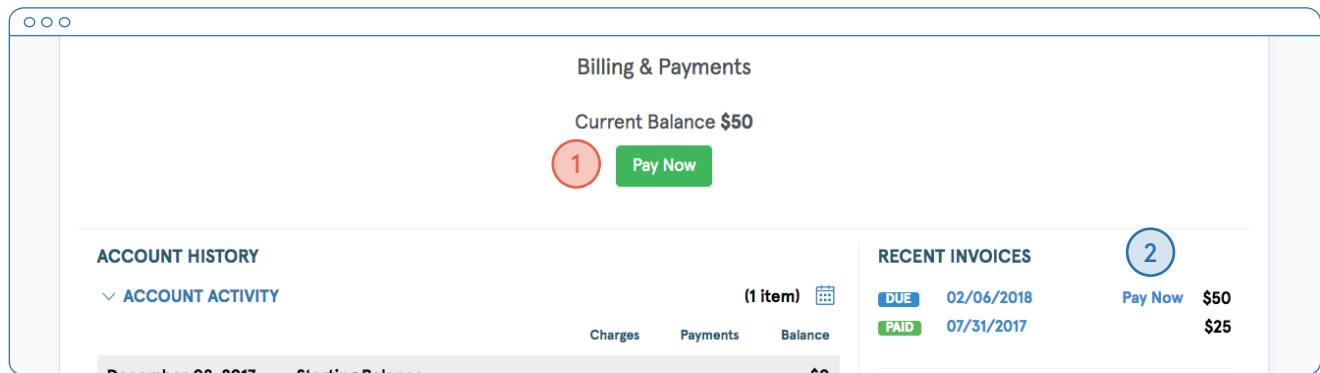
January 30, 2017

**View All** **3**

INSURANCE RE-IMBURSEMENT STATEMENTS			All time
ISSUED	ID	AMOUNT	
May 24, 2017	SB #0095	\$80	
March 07, 2017	SB #0087	\$380	
February 10, 2017	SB #0082	\$180	
January 30, 2017	SB #0080	\$500	
October 06, 2016	SB #0074	\$480	

## 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, click **Pay Now next to the invoice amount** in the Recent Invoices section.

Note: You can also pay an unpaid invoice by opening up that invoice and clicking the Pay button at the top of the document.

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 **Remember 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 recent invoice section has changed from **Due** to **Paid**.

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

A screenshot of a 'Make Payment' modal form. The title is 'Make Payment' with a close button (X) in the top right corner. Below the title is the text 'After the Storm Therapy'. The form contains several input fields: 'Christian Asami' (cardholder's name), 'Card Number', 'MM / YY' (expiration date), 'CVC' (security code), and 'Billing Zipcode' with a 'Zip Code' input field. There is a checkbox labeled 'Remember Card'. At the bottom right, there is a green button labeled 'Pay \$50.0'.

**Congratulations!**

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