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:

1. How do I log in?

2. Troubleshooting

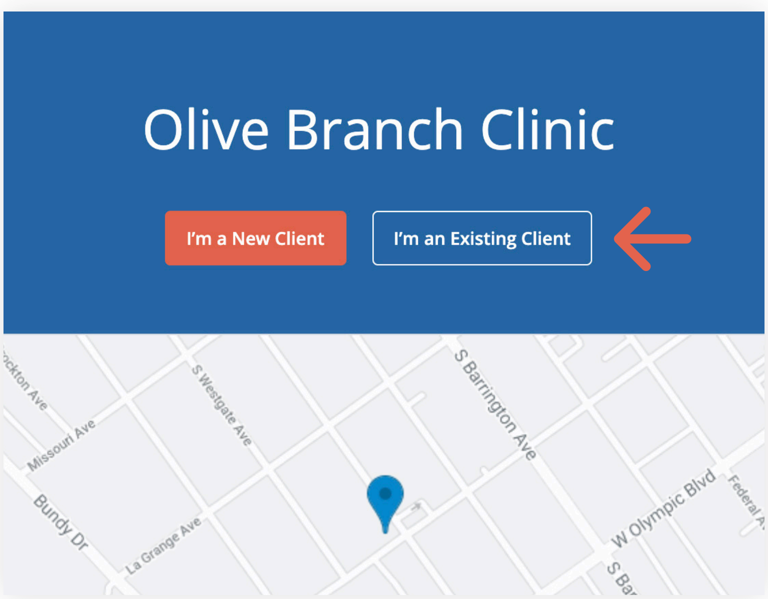
3. Online booking

4. Documents and forms

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

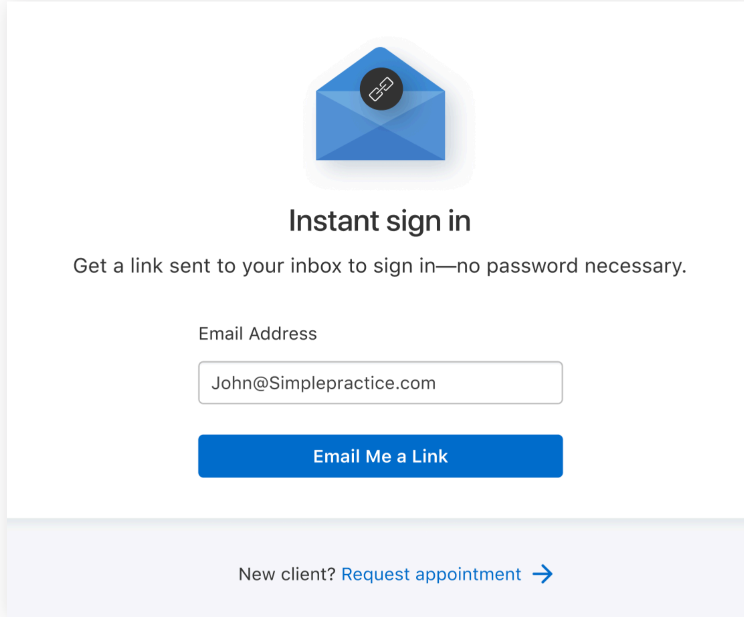


To log back in:

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

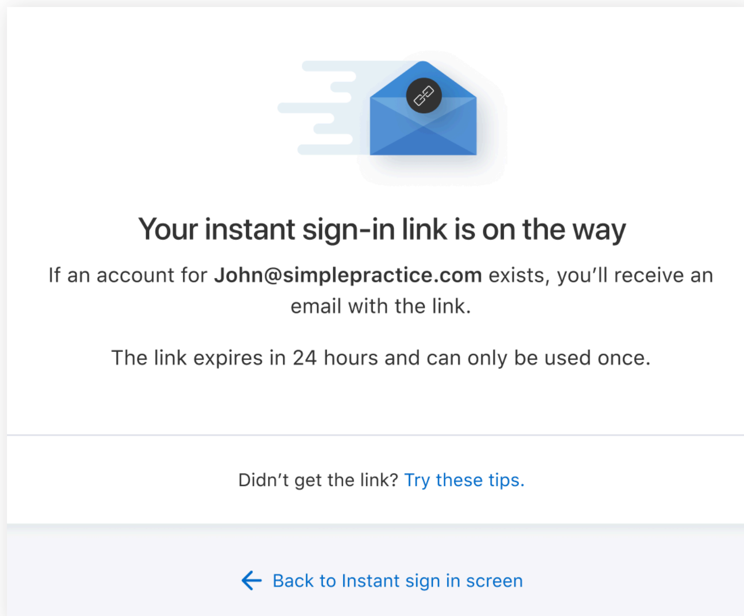
Tip: Bookmark this page so you can log back in easily in the future.

3. Enter the **email address** associated with your account. Click **Email Me a Link.**



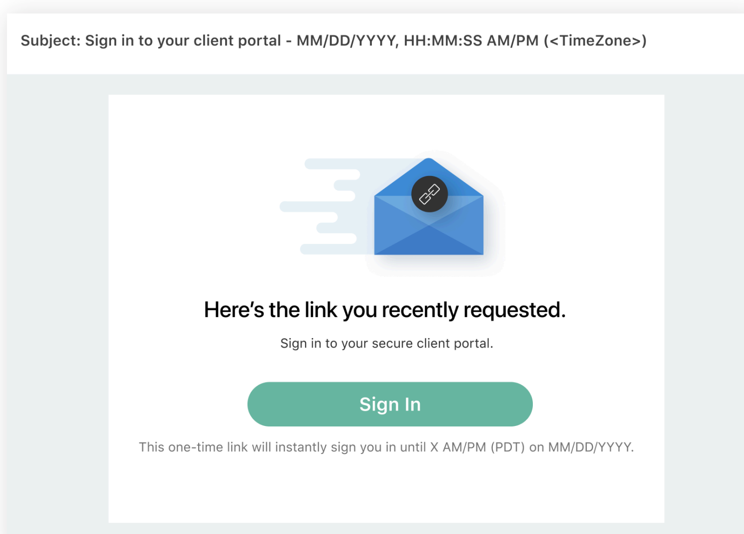
4. Check your inbox to find the sign-in email. Keep in mind that the link in the email is valid for 24 hours and can **only** be used to sign in once.

Note: If you don't see the sign-in email in your inbox, click **Try these tips**.



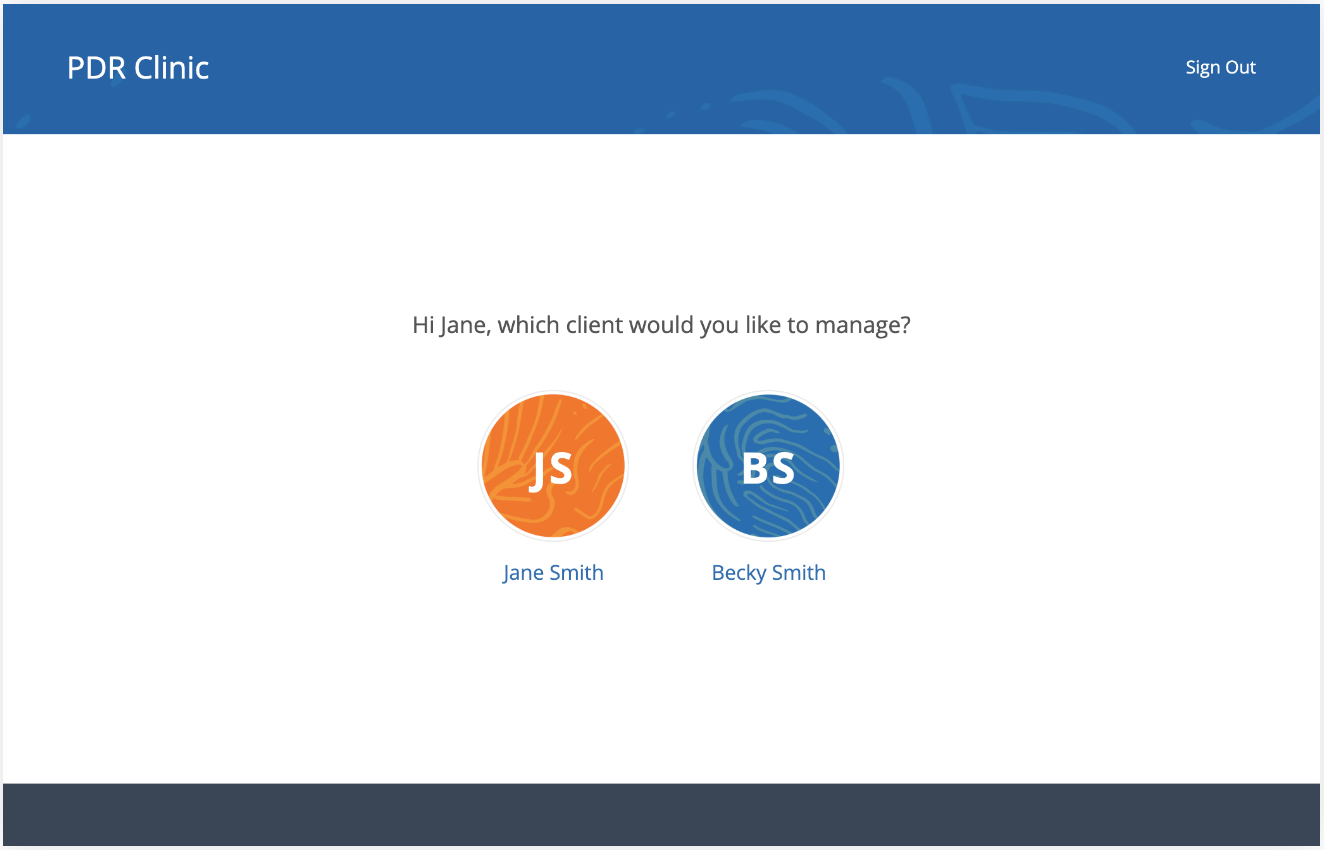
5. Click the **Sign In** link from the email to automatically log into your Client Portal. It expires after 24 hours and can only be used to log in one time.

Important: You must use the most recent Sign In link in your inbox. If you requested a Sign In link multiple times and click an older link when a newer one exists, you will not be able to sign into the Client Portal.



MANAGING MULTIPLE PROFILES

If you're seeing your provider individually and for couple appointments, or if you have minor client(s) that you're responsible for, you may have multiple client portal profiles. If that's the case, you'll see multiple icons upon signing in to the client portal. Simply select the profile that you want to manage.



TROUBLESHOOTING SIGN-IN ISSUES

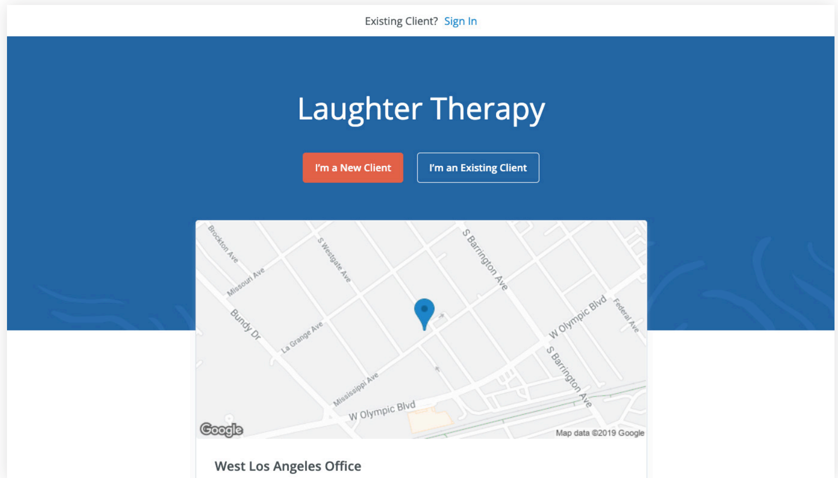
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from no-reply@simplepractice.com. Add this address as a contact to make sure you get these emails in the future.
3. Call your provider's office and r**equest a pin code** to sign in. Your provider can give you a 6-digit pin code that you can use along with your email address to sign in. Call the number that you see on the page, request the pin code, and make sure to confirm your account email address while you're on the call. Once you have the pin code ready, click **Sign in via Pin code**, enter the code, and click **Sign In.**

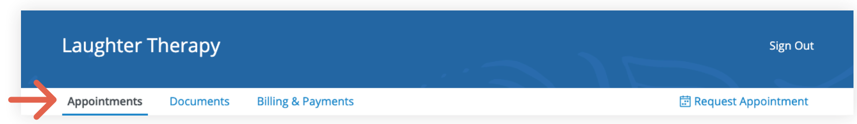
ONLINE BOOKING

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:

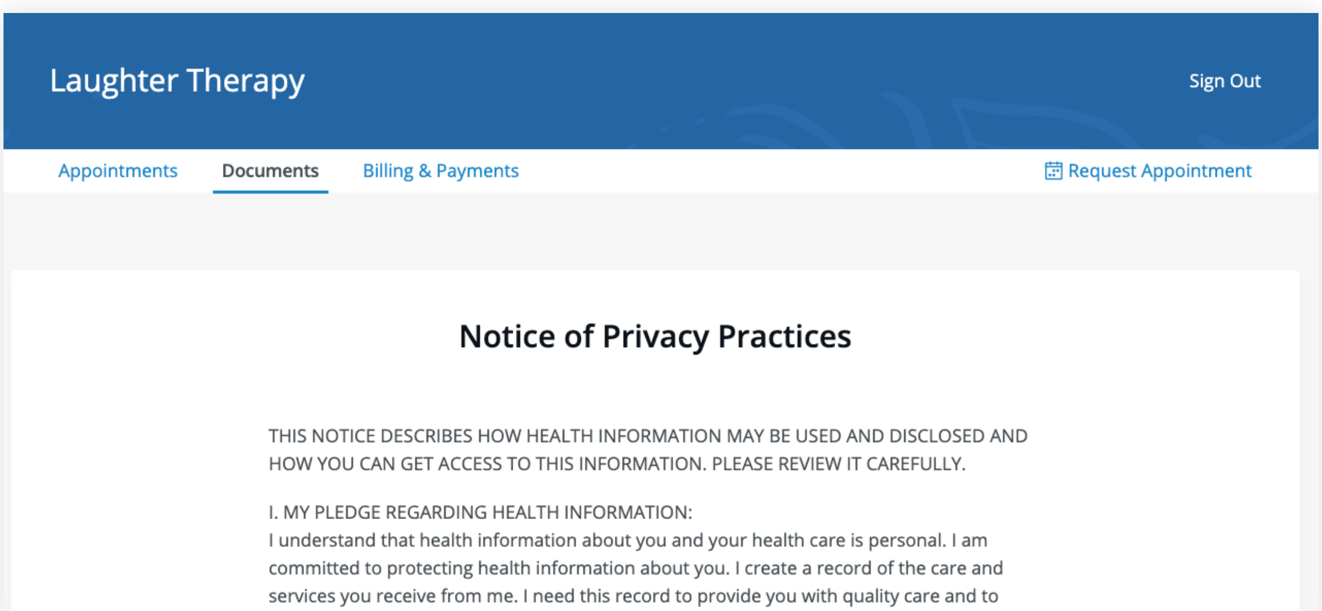
1. Go to your clinician's Client Portal and click **I'm an Existing Client** to log in. The **I'm a New Client** button is only for clients who have never logged into the Client Portal before.
2. Navigate to the appointments tab. This may already be selected by default after you log in.



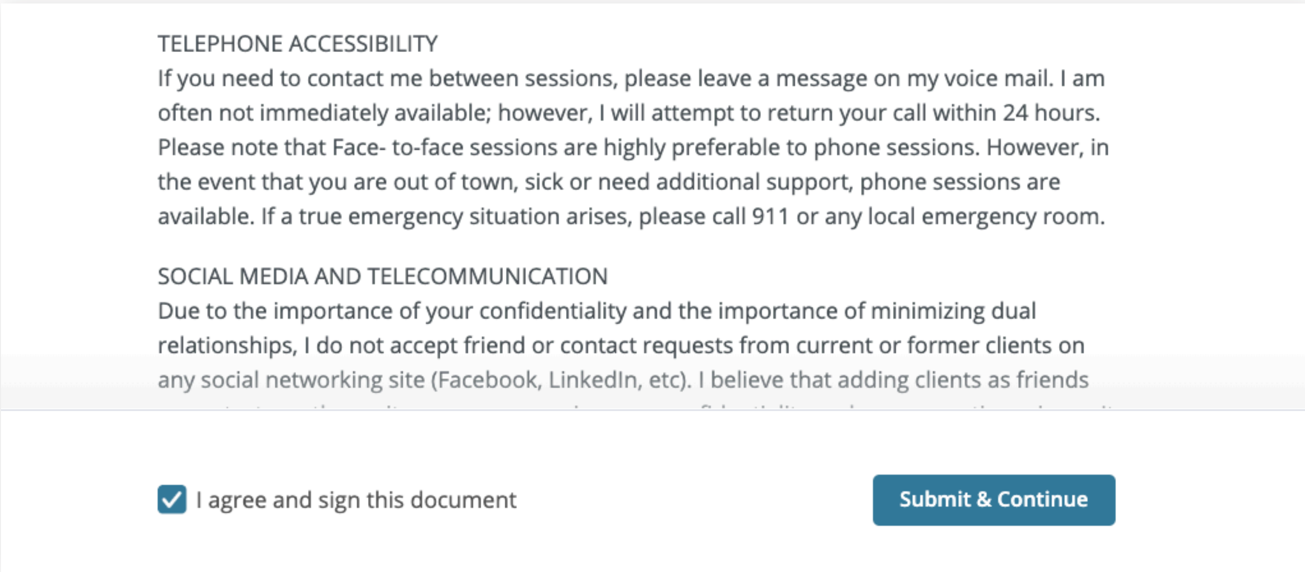


DOCUMENTS AND FORMS

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.

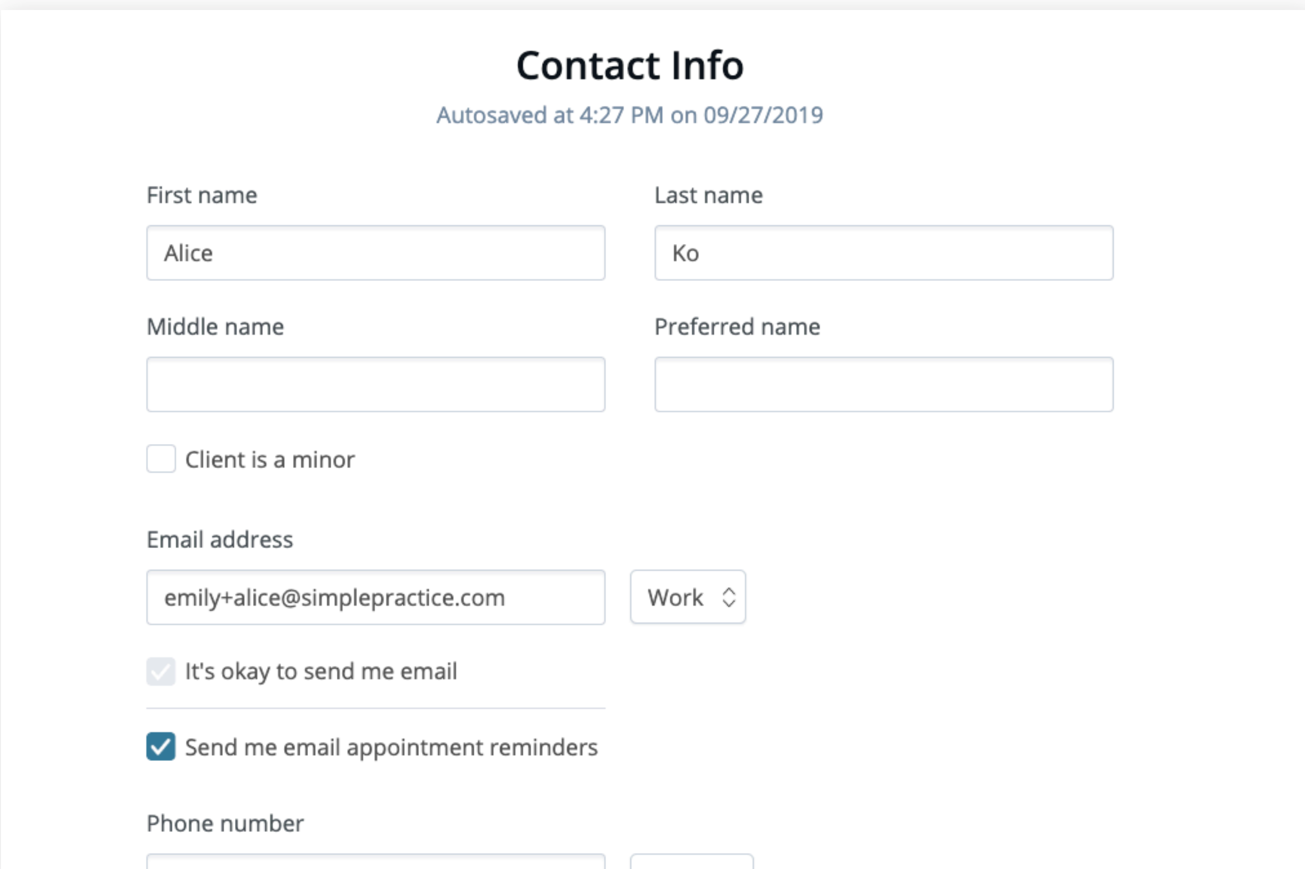

TELEPHONE ACCESSIBILITY
If you need to contact me between sessions, please leave a message on my voice mail. I am often not immediately available; however, I will attempt to return your call within 24 hours. Please note that Face- to-face sessions are highly preferable to phone sessions. However, in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

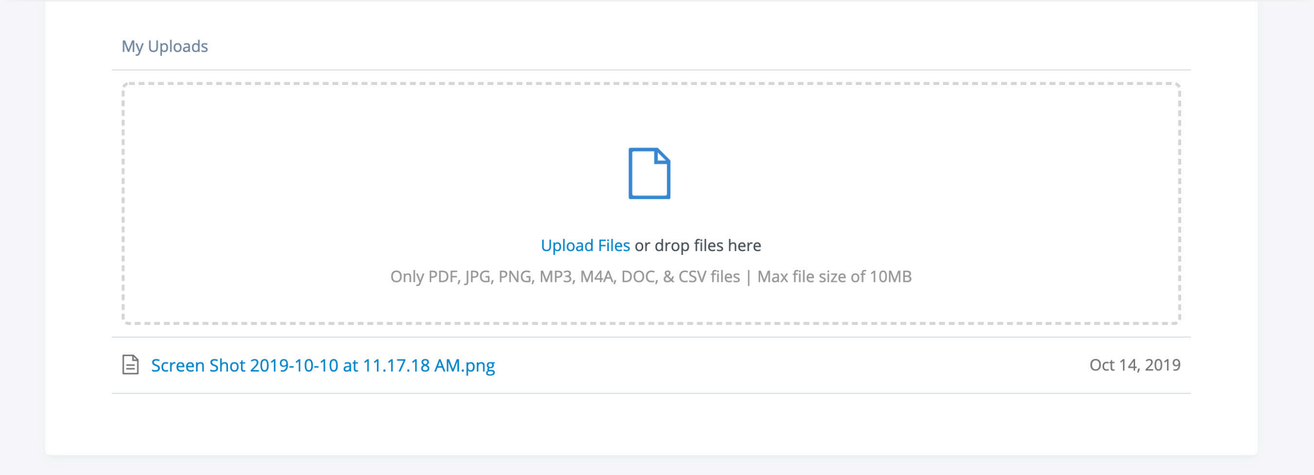
It's okay to send me email

Send me email appointment reminders

Phone number: (949) 306-8945 — Work

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. Connect with your clinician from anywhere using any device, as long as you have internet connection.

SECTIONS:

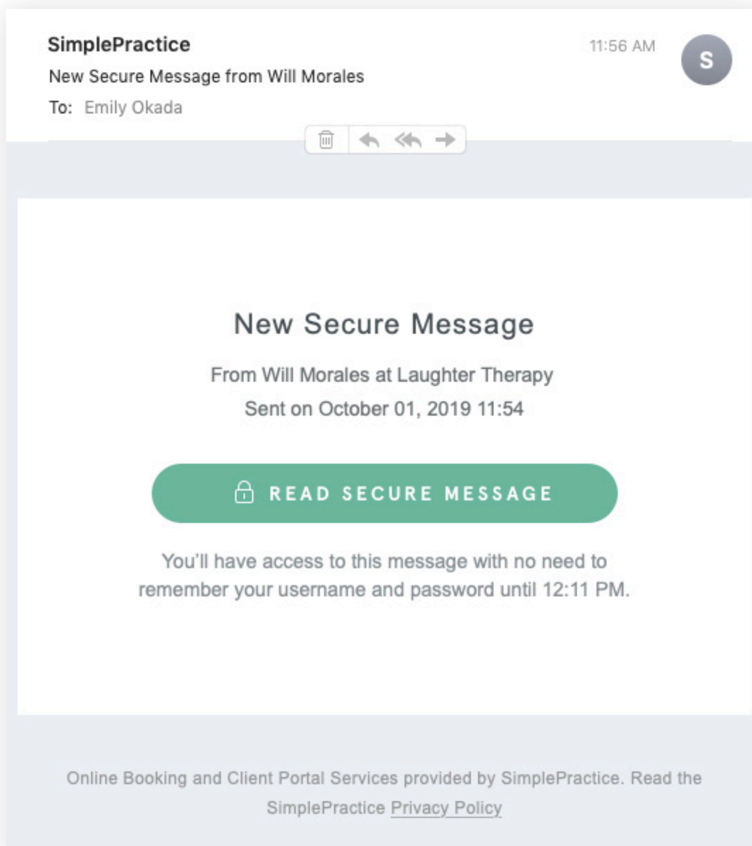
1. Message notifications

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 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.

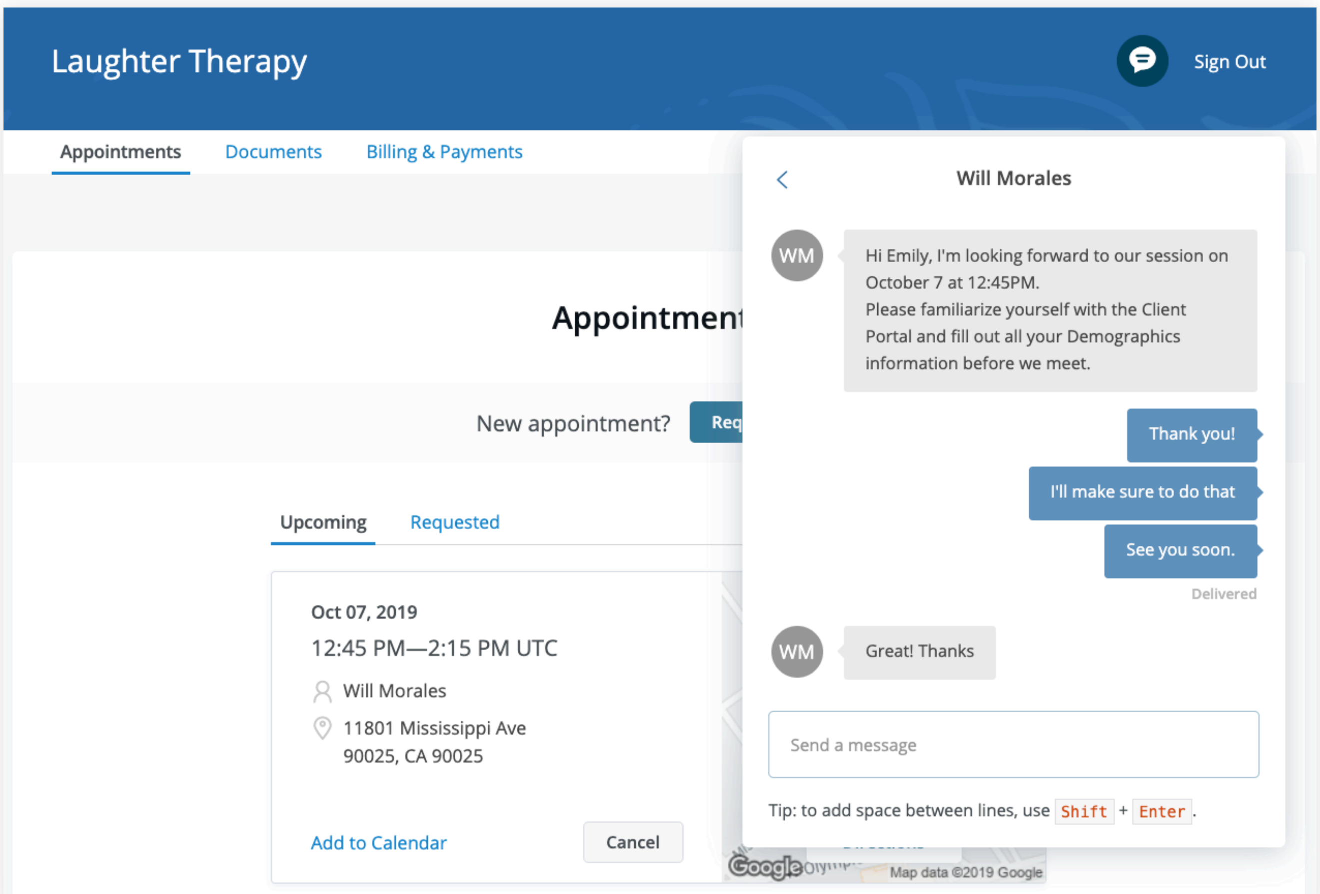


NOTE: After 15 minutes pass from when you receive the email, you'll have to log in to view your message through the Sign In link you'll receive via email.

HOW TO REPLY

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 or send messages. If you received a new message, an **orange dot** will indicate that.

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



Congratulations!

You're now ready to start using Secure Messaging.

GETTING STARTED GUIDE

How to Request Appointments

with simplepractice

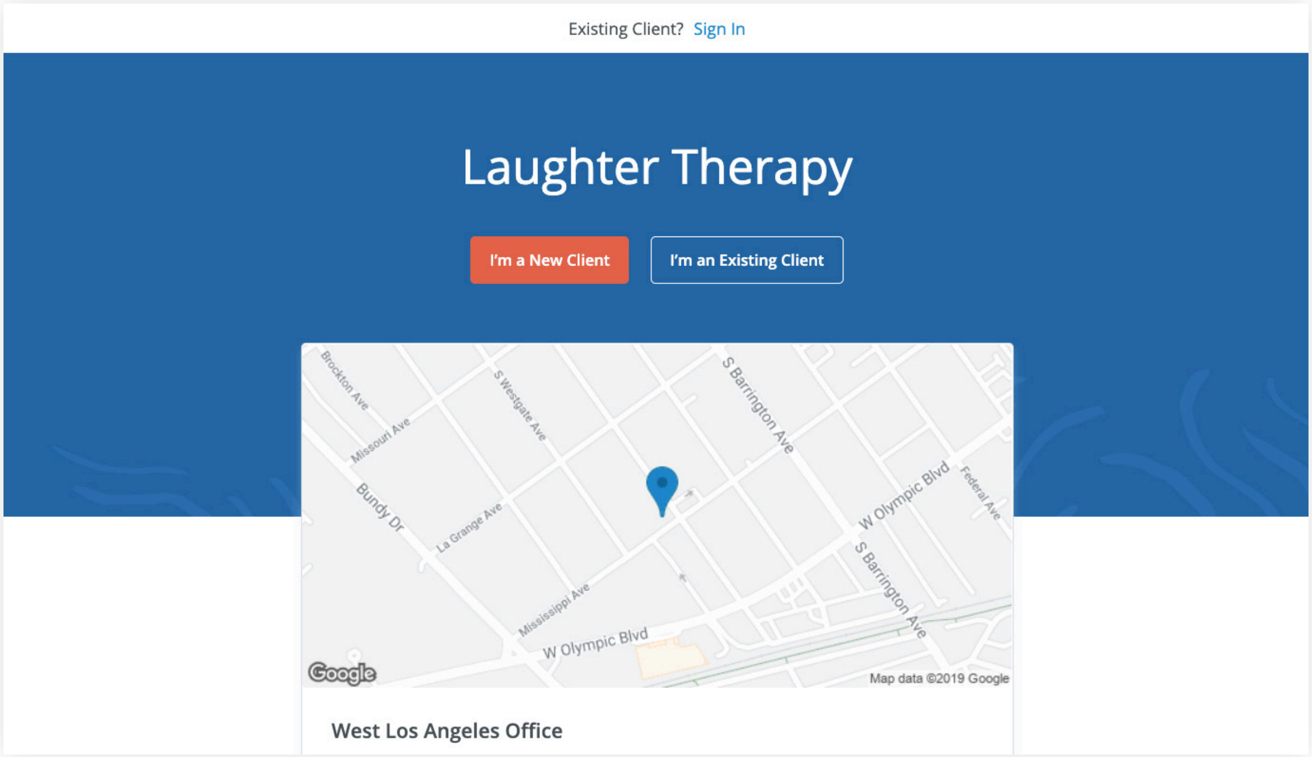
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

SECTIONS:

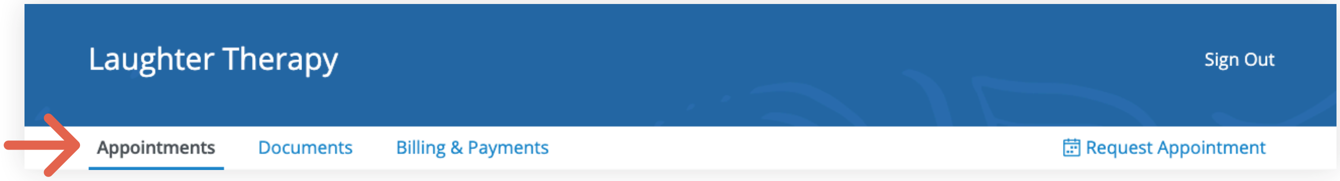
1. Request an appointments
2. Cancelling requests

REQUEST AN APPOINTMENT

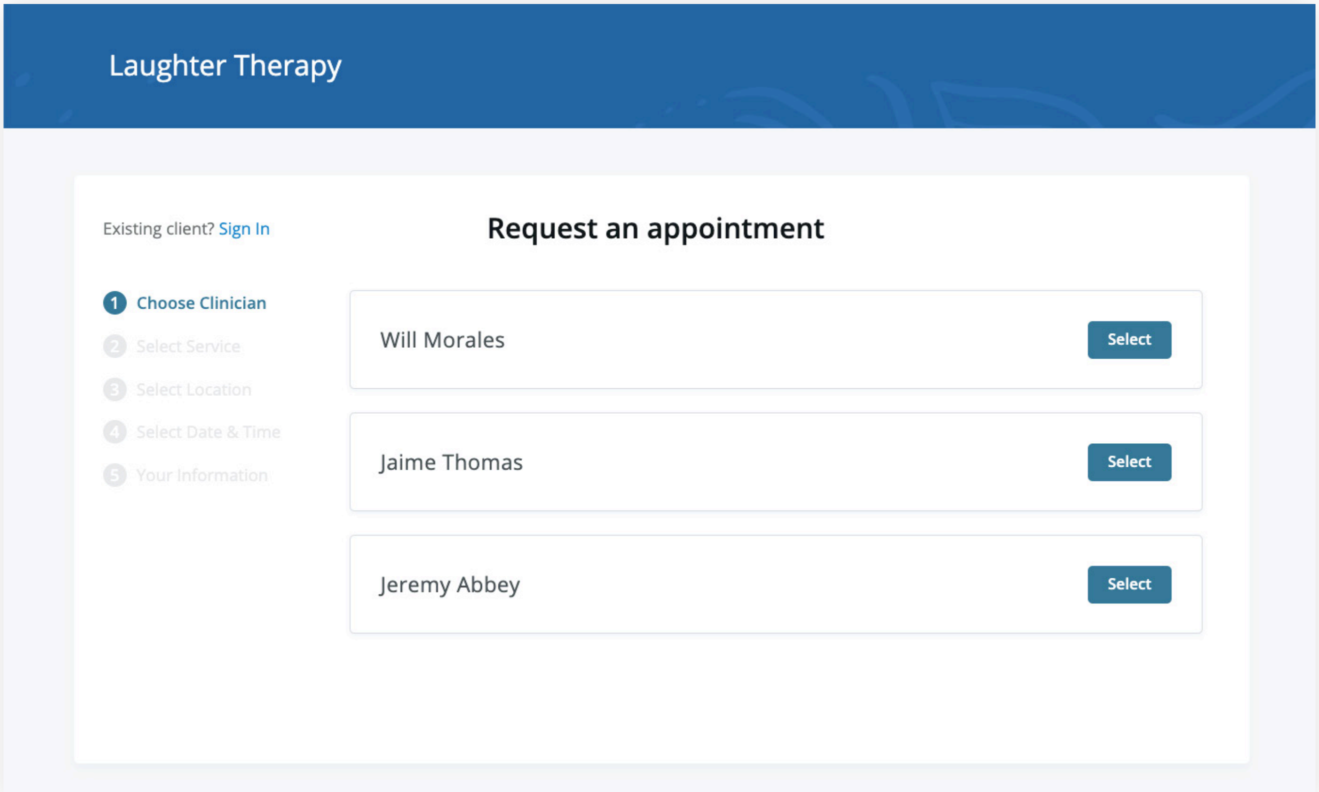
1. Go to your clinician's Client Portal and click **I'm an Existing Client** to log in. The **I'm a New Client** button is only for clients who have never logged into the Client Portal.



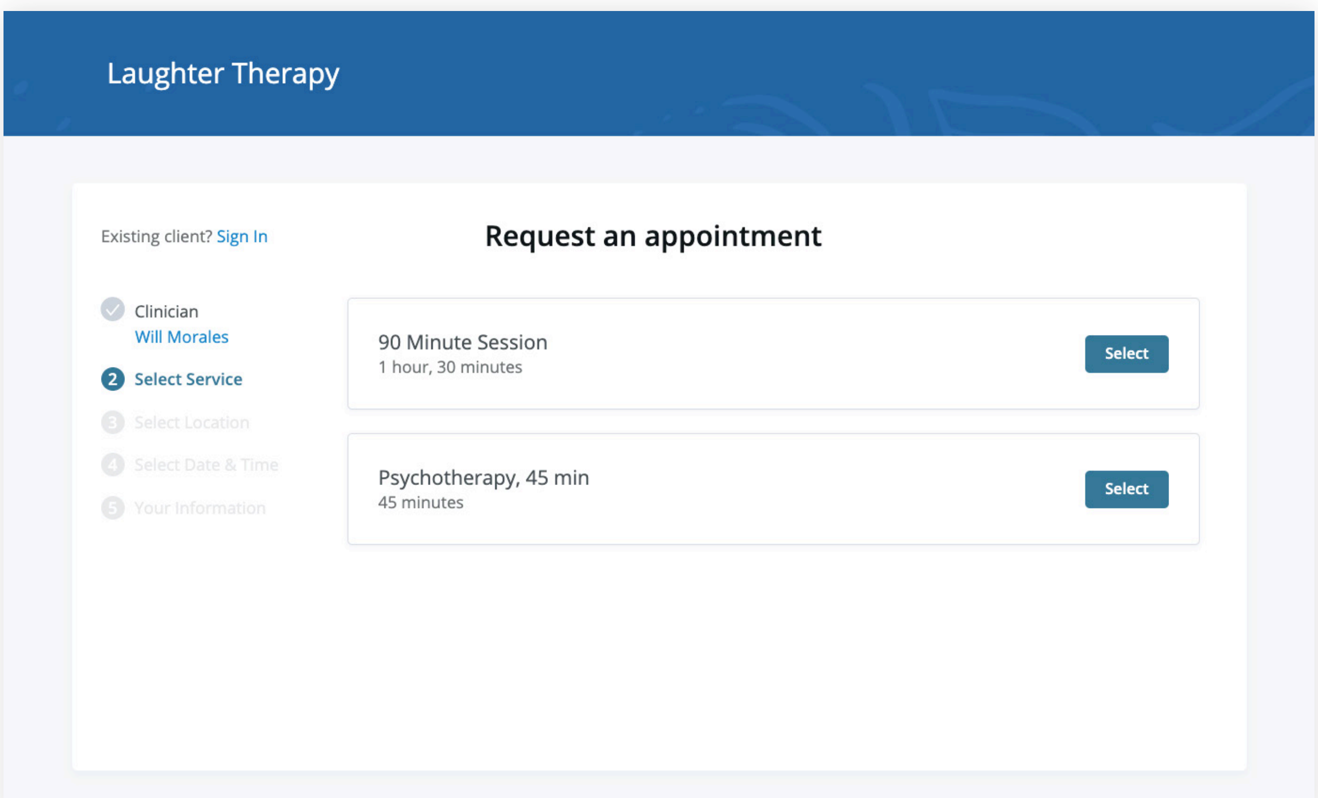
2. Navigate to the **Appointments tab** (This may already be selected by default).



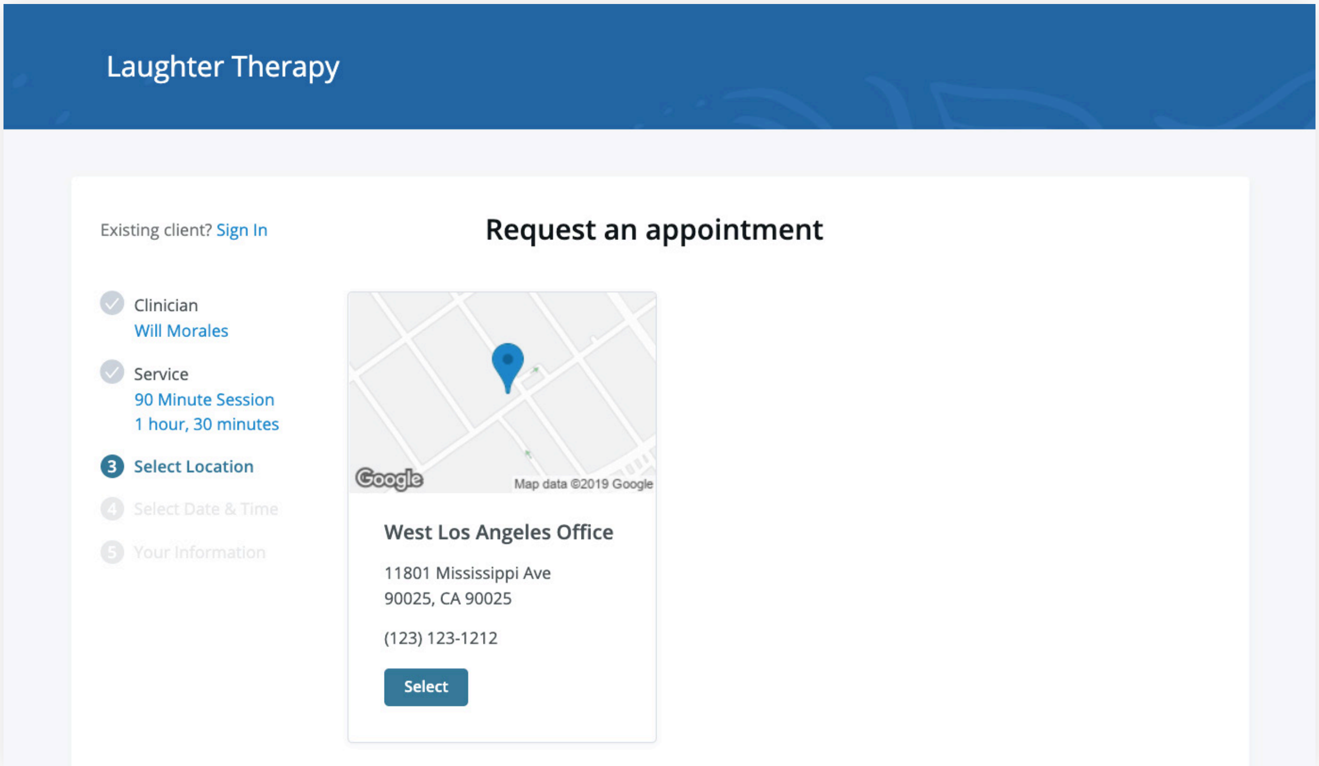
3. Select your **clinician** (if there are multiple).



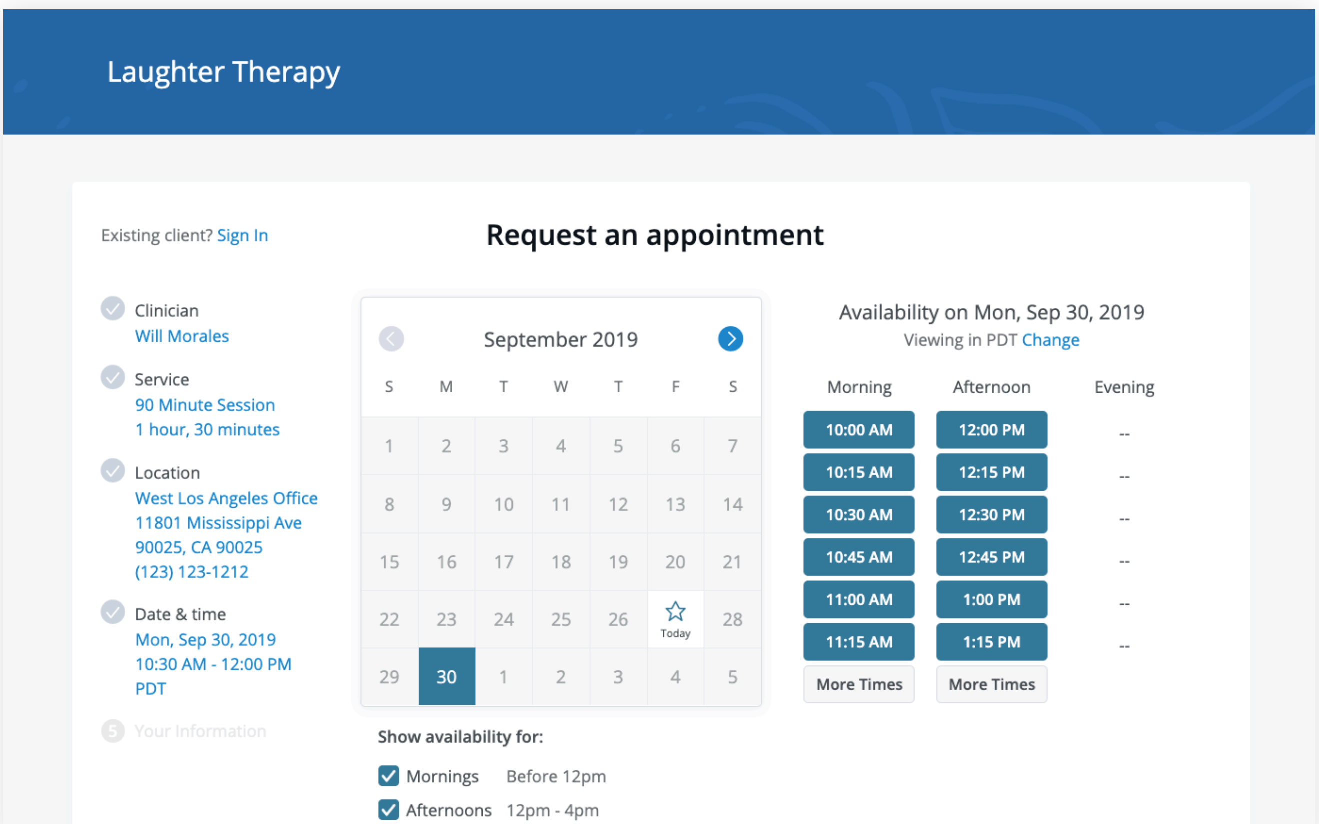
4. Select your **service**.



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

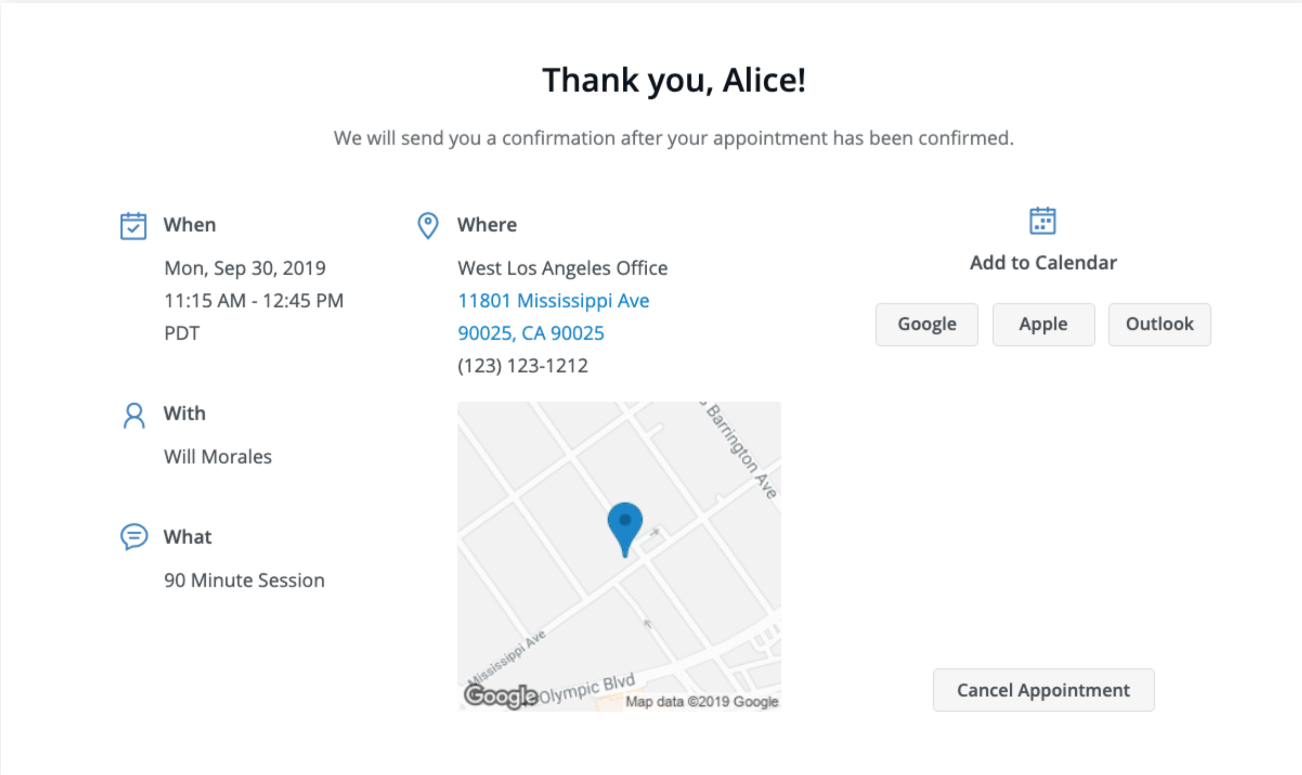


6. Click the **date and time** that you'd like.



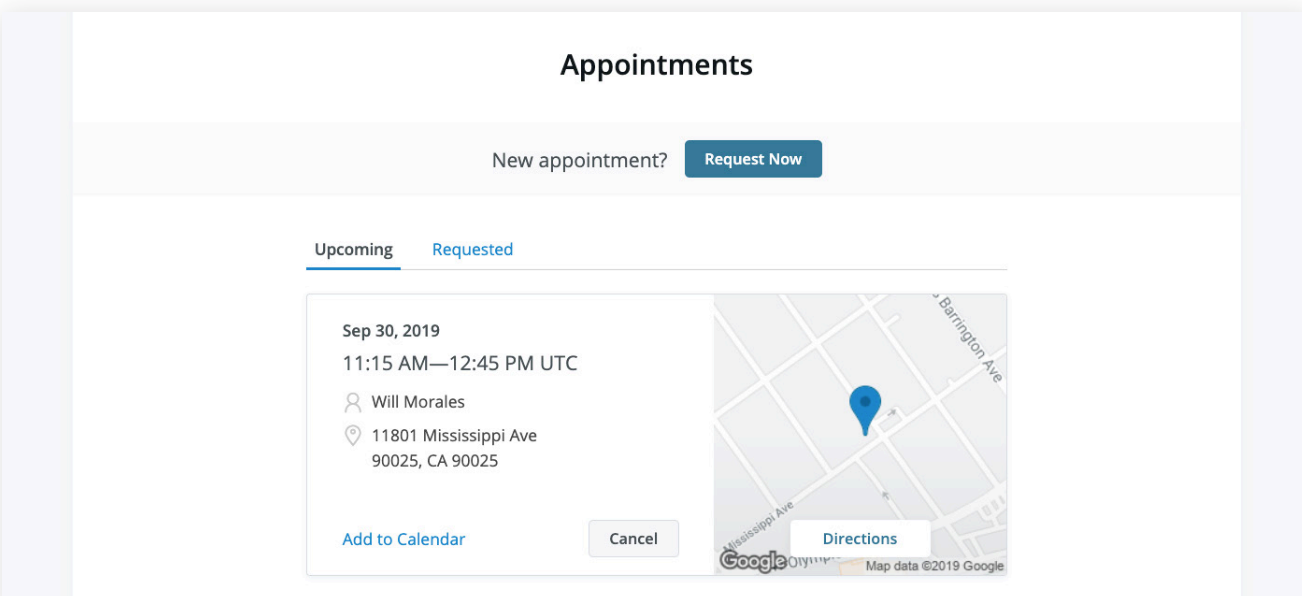
7. Your appointment request has been **sent** to your clinician. Your clinician will need to accept your request to make it official.

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



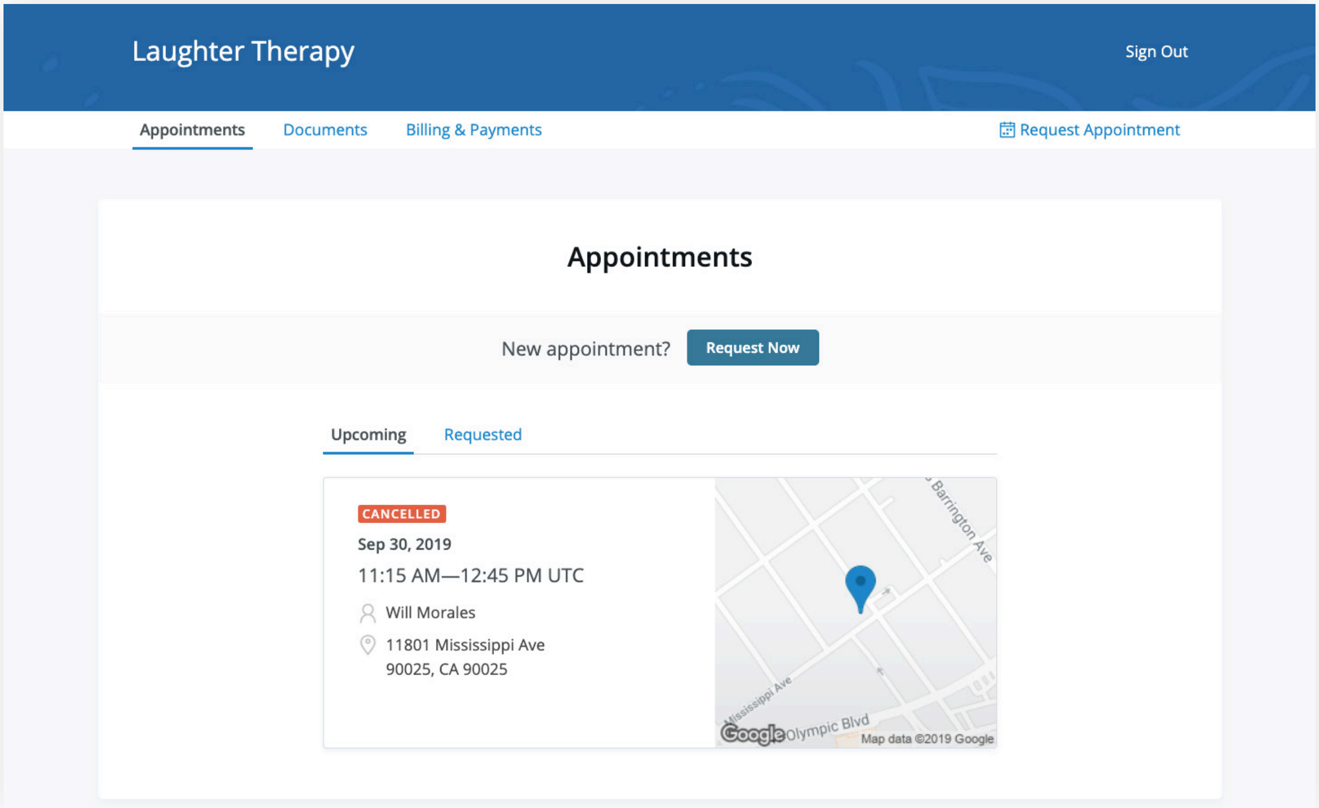
8. If your request is accepted, you'll receive an **email** confirming the session.

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

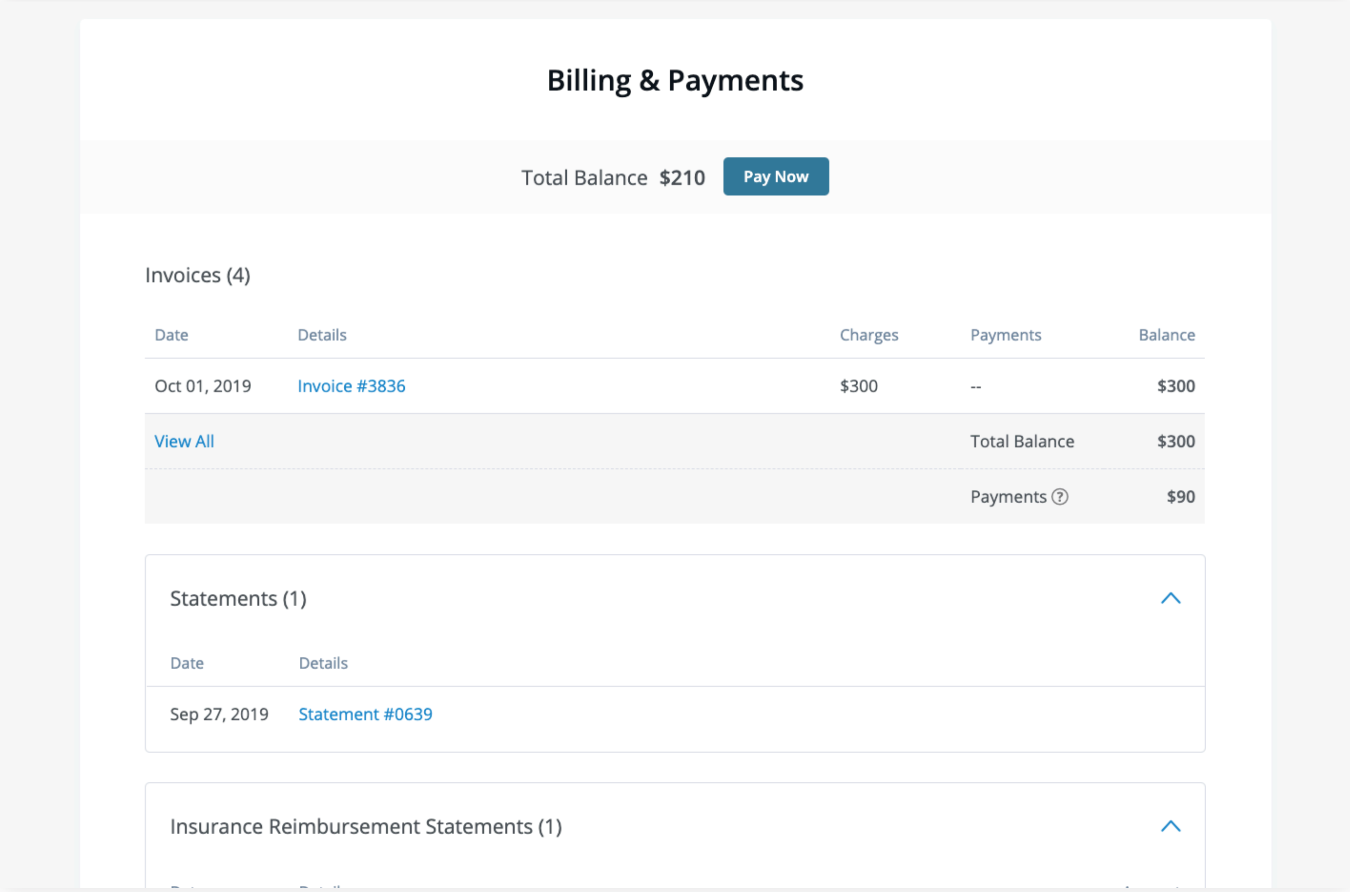
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

SECTIONS:

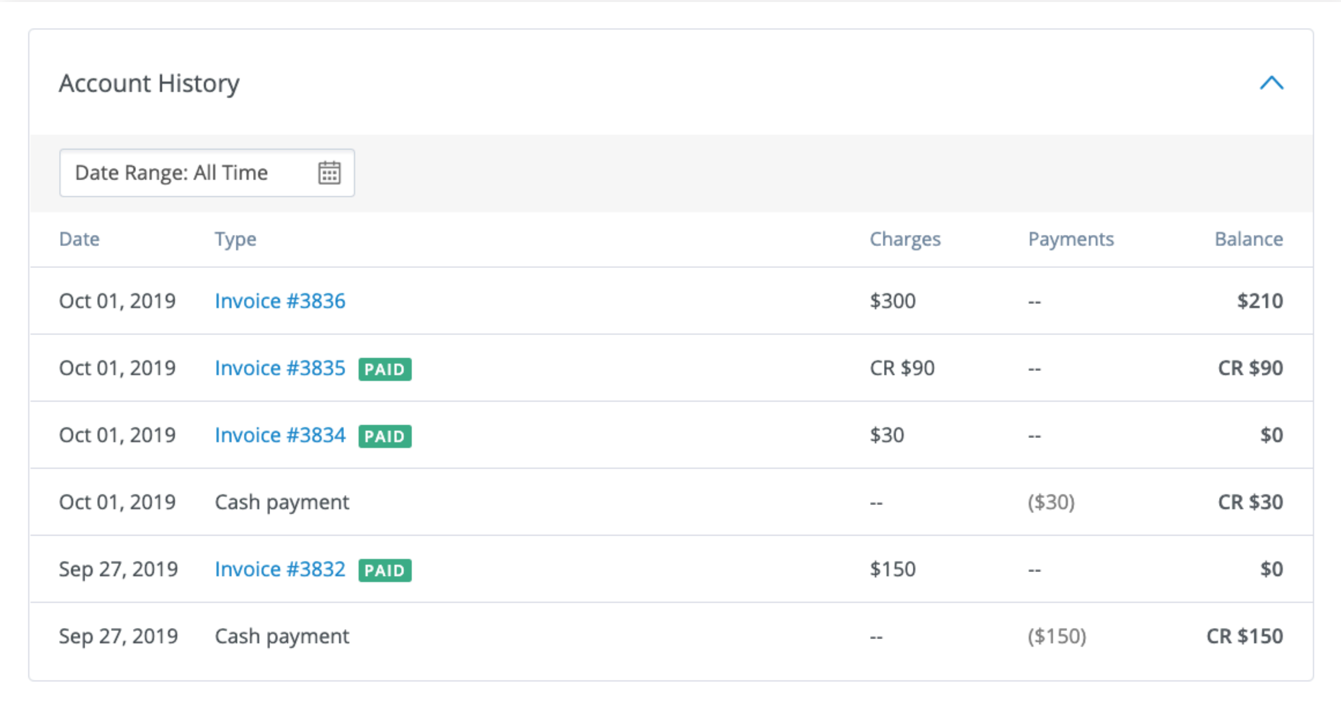
1. Viewing your billing history and documents
2. Making payments

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).



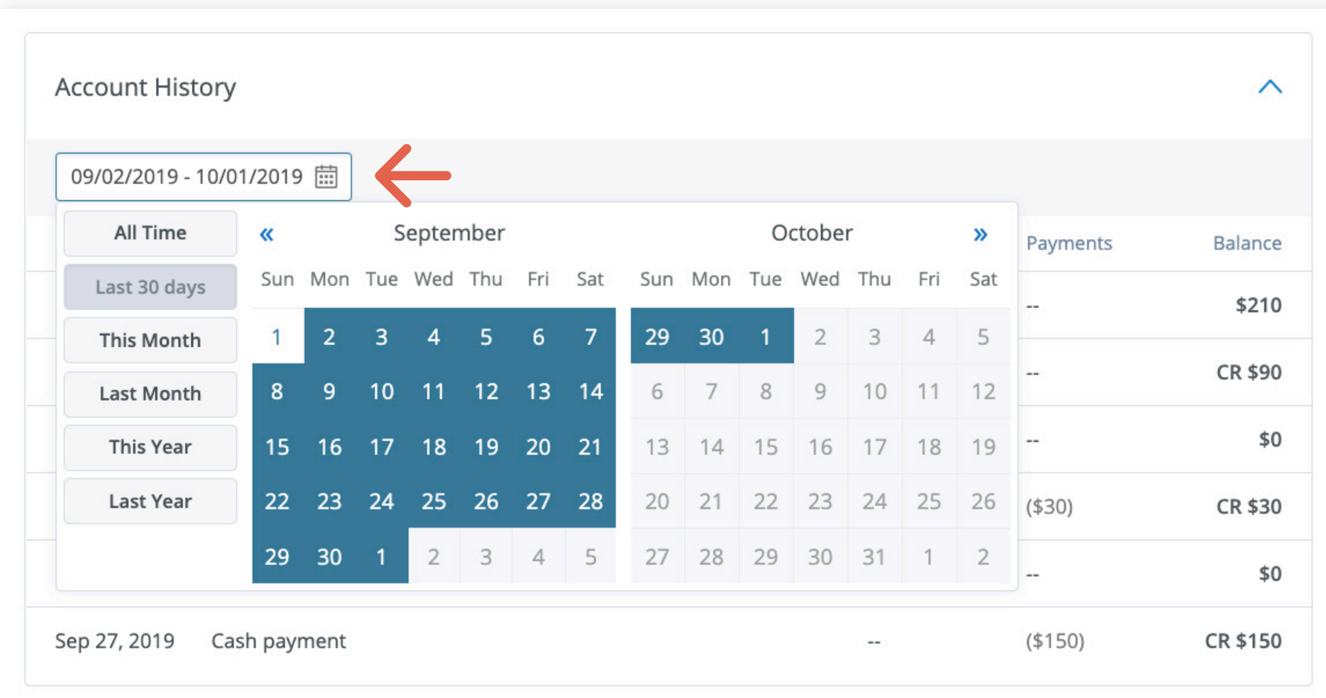
3. At the very bottom there's a section for **Account History** that shows your most recent sessions and payments.


Account History

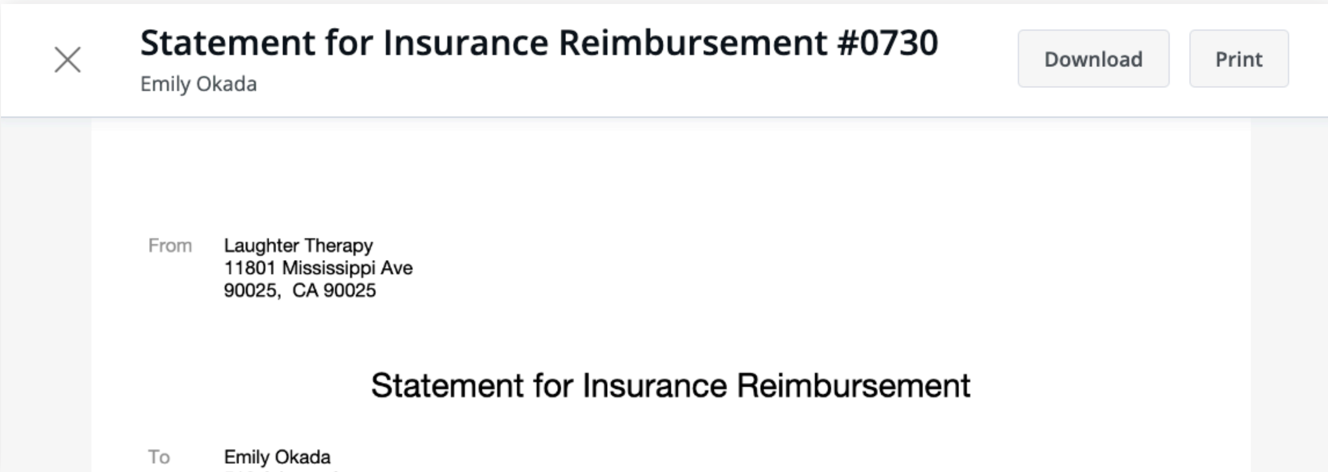
Date Range: All Time

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.



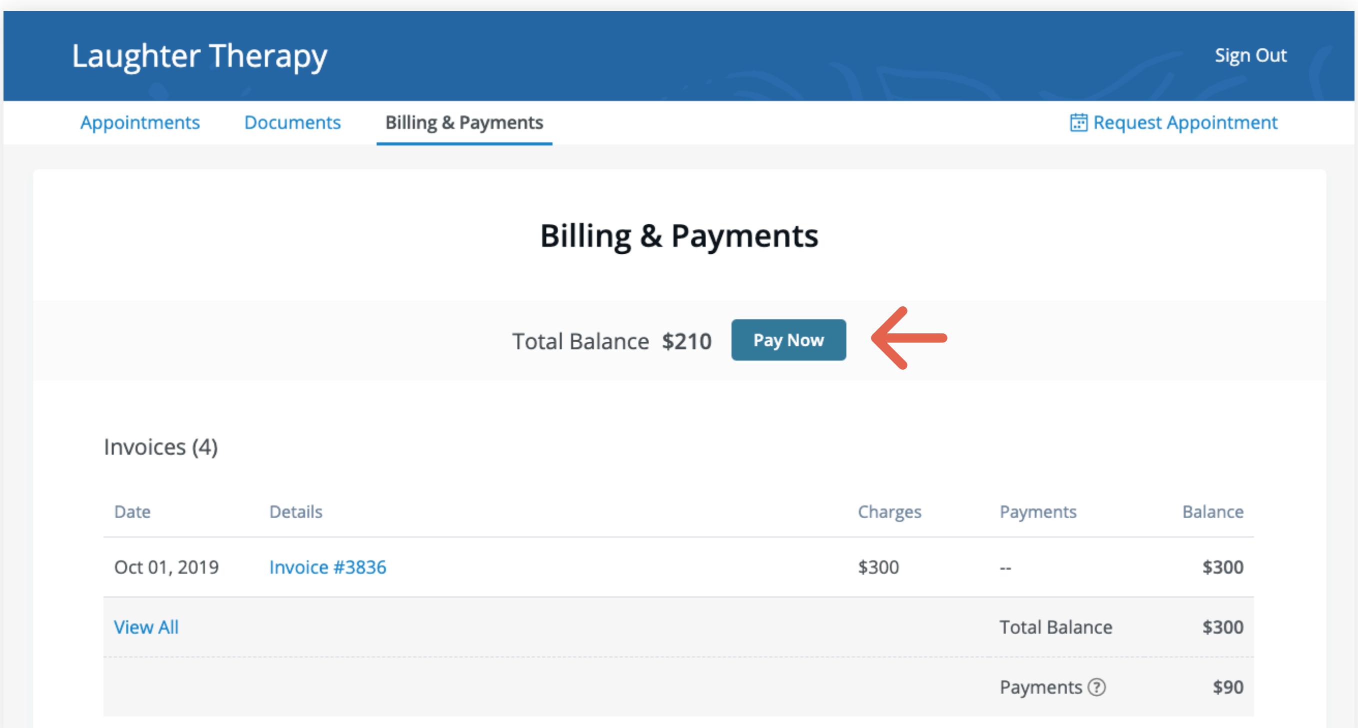
TIP: Once you open a document, you can click **Print** to print it or **Download PDF** to download it to your computer.



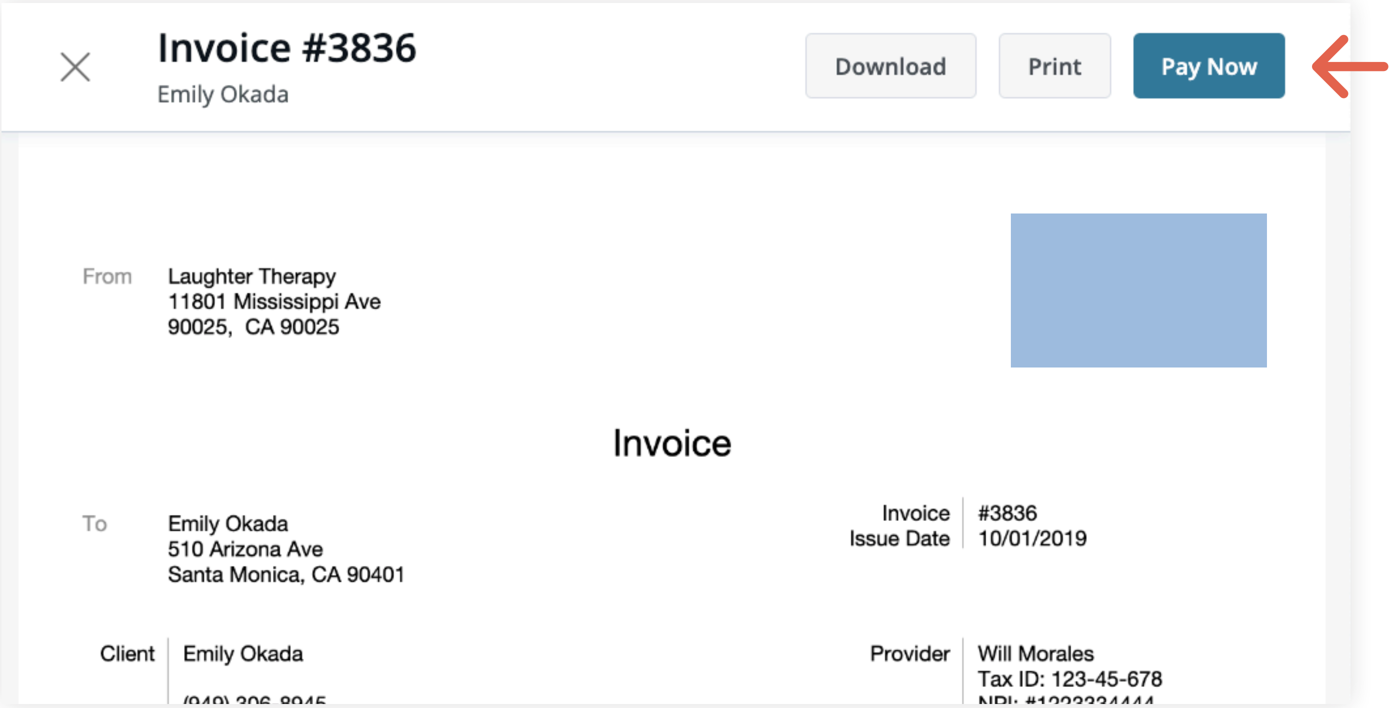
MAKING PAYMENTS

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.



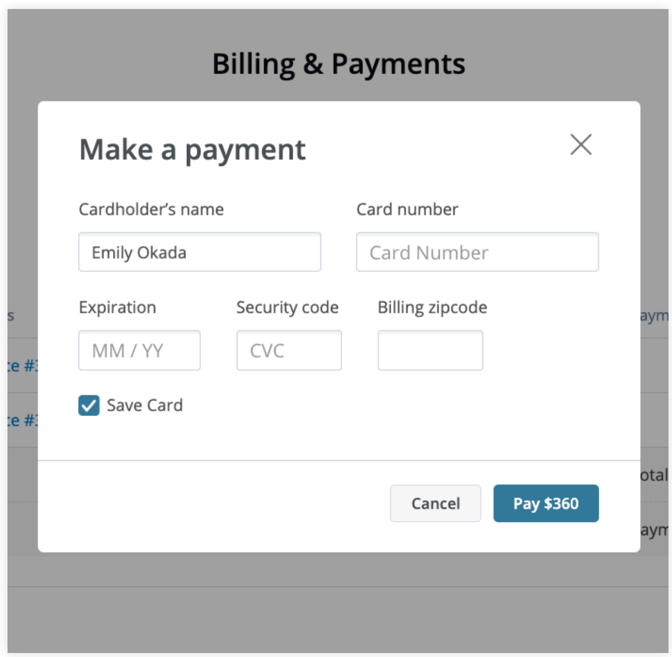
2. To pay a specific invoice, open the invoice and click **Pay Now** at the top.



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

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