



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.

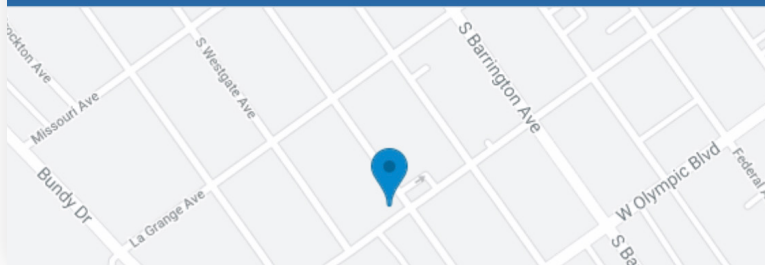
Thank you!

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

Olive Branch Clinic

I'm a New Client

I'm an Existing Client



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**.



Instant sign in

Get a link sent to your inbox to sign in—no password necessary.

Email Address

John@Simplepractice.com

Email Me a Link

New client? [Request appointment](#) →

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](#).



Your instant sign-in link is on the way

If an account for **John@simplepractice.com** exists, you'll receive an email with the link.

The link expires in 24 hours and can only be used once.

Didn't get the link? [Try these tips](#).

← [Back to Instant sign in screen](#)

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.

Subject: Sign in to your client portal - MM/DD/YYYY, HH:MM:SS AM/PM (<TimeZone>)



Here's the link you recently requested.

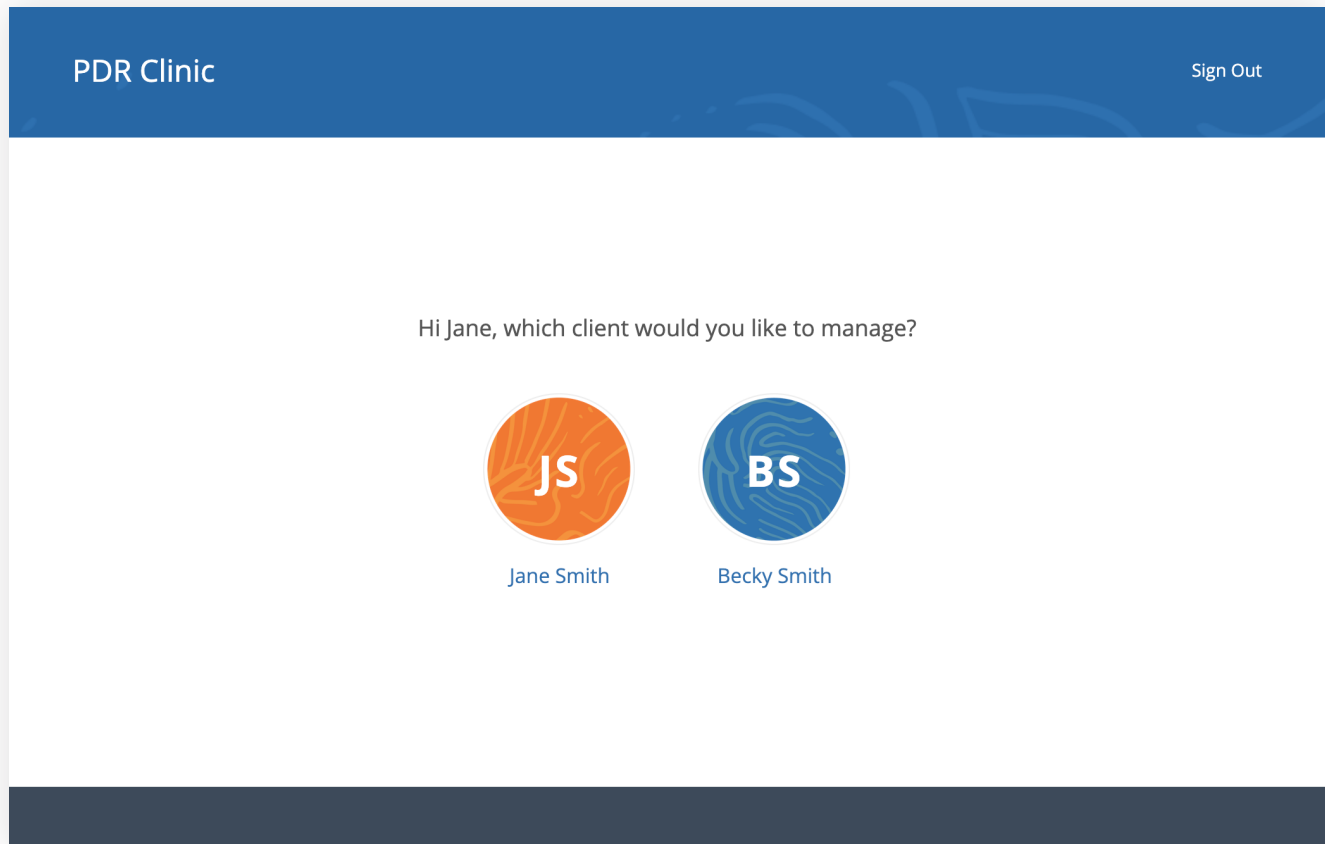
Sign in to your secure client portal.

Sign In

This one-time link will instantly sign you in until X AM/PM (PDT) on MM/DD/YYYY.

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

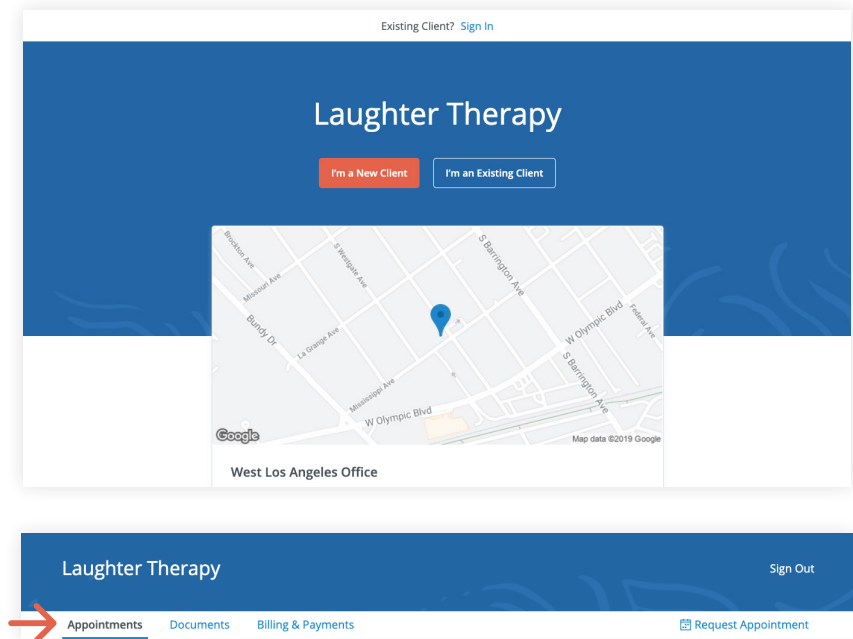
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from no-reply@simplepractice.com. Add this address as a contact to make sure you get these emails in the future.
3. Call your provider's office and **request 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.

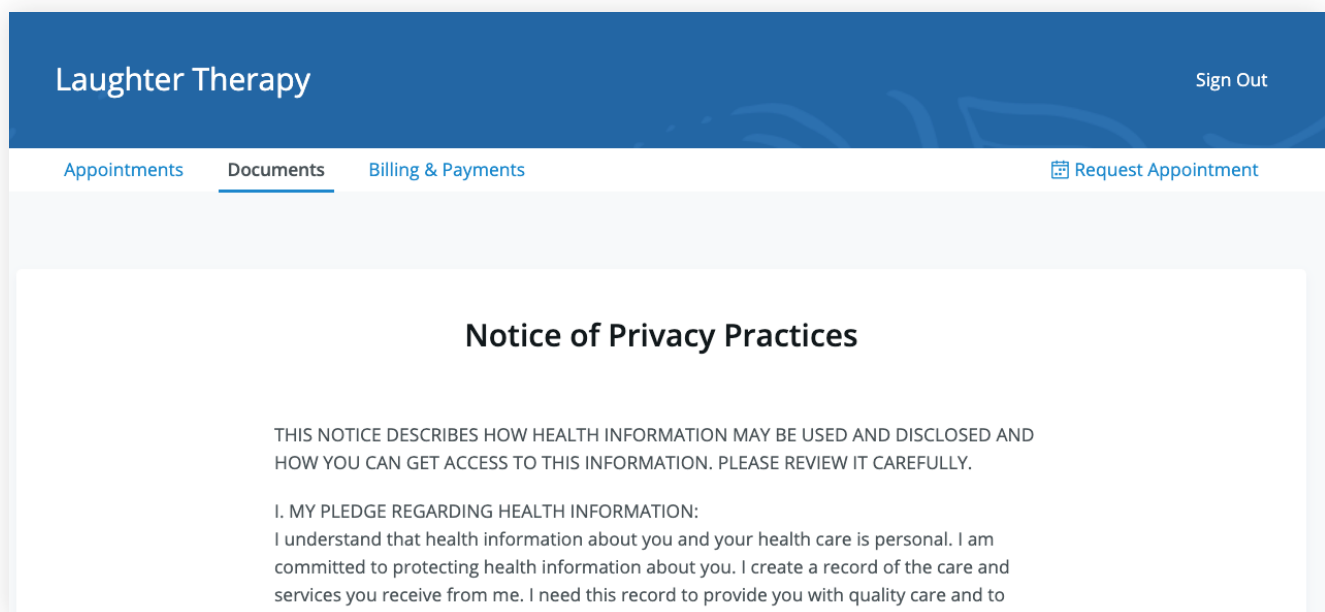
To request appointments through the Client Portal:

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.

Olive Branch Clinic

 Sign Out

[Appointments](#)[Documents](#)[Billing & Payments](#)[Request Appointment](#)

Documents, Forms and Files

Needs to be completed	Date received
 Standard Intake Questionnaire Template	Sep 27, 2019

Completed	Date completed
 ABA Child Intake Form	Oct 22, 2019
 Notice of Privacy Practices	Sep 27, 2019
 Informed Consent for Psychotherapy	Sep 27, 2019
 Practice Policies	Sep 27, 2019

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.

My Uploads


[Upload Files](#) or drop files here
Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB

 Screen Shot 2019-10-10 at 11.17.18 AM.png	Oct 14, 2019
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Congratulations!

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

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.

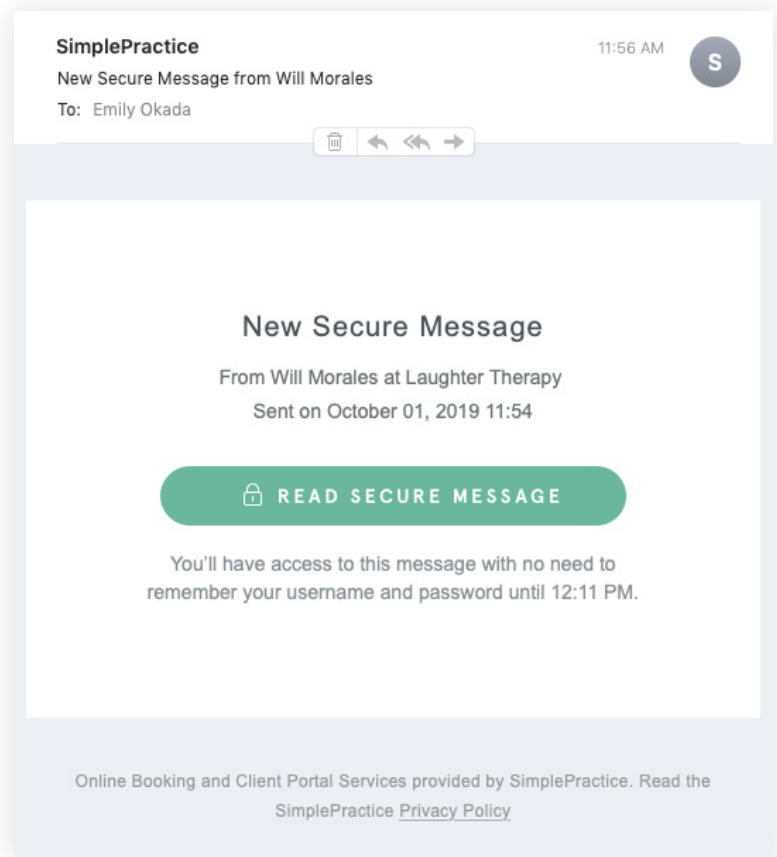
SECTIONS:

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:

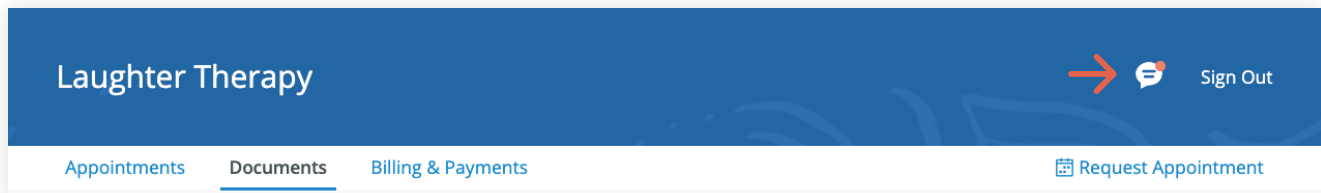
1. Click the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**.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



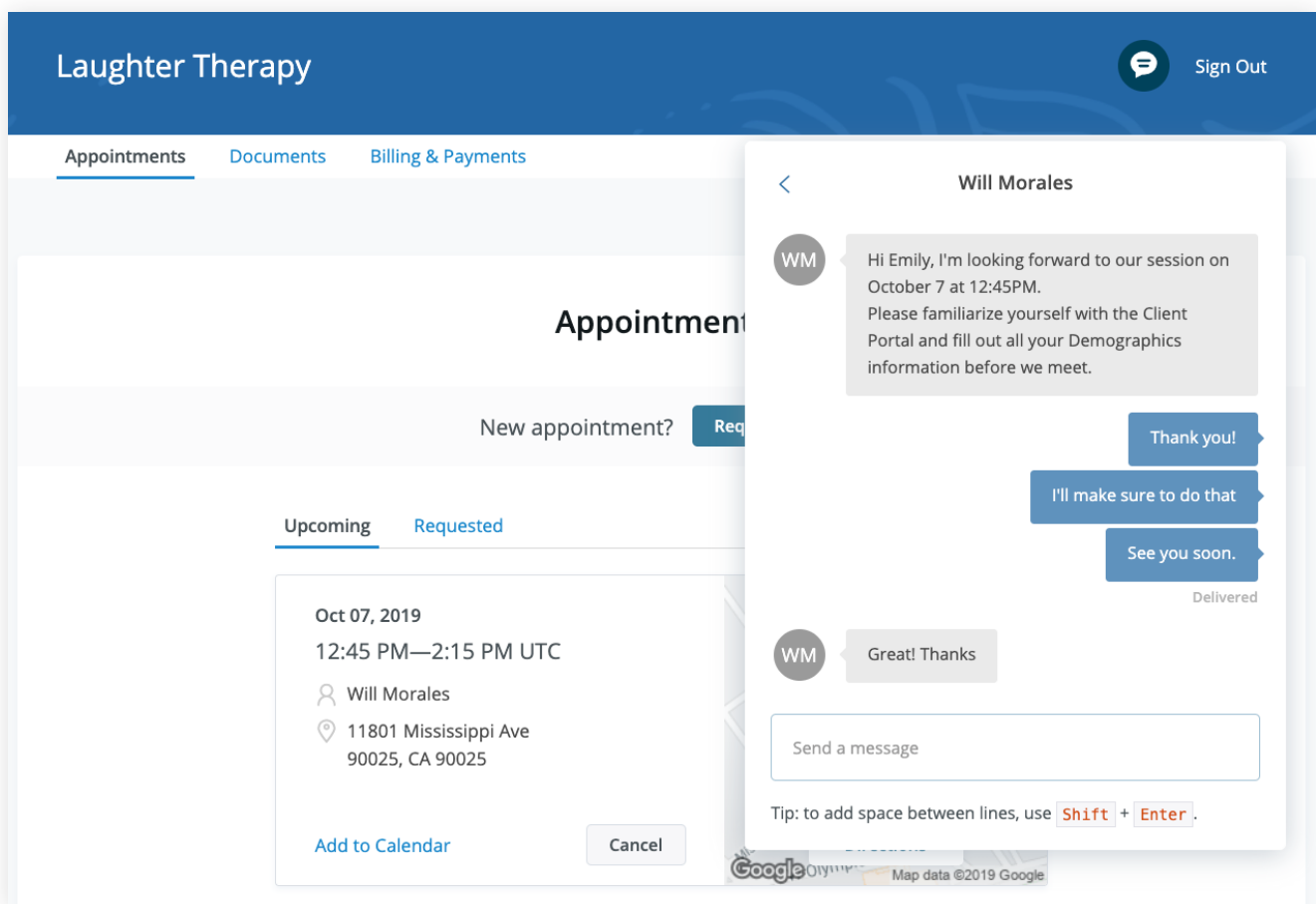
NOTE: After 15 minutes pass from when you receive the email, you'll have to log in to view your message through the Sign In link you'll receive via email.

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

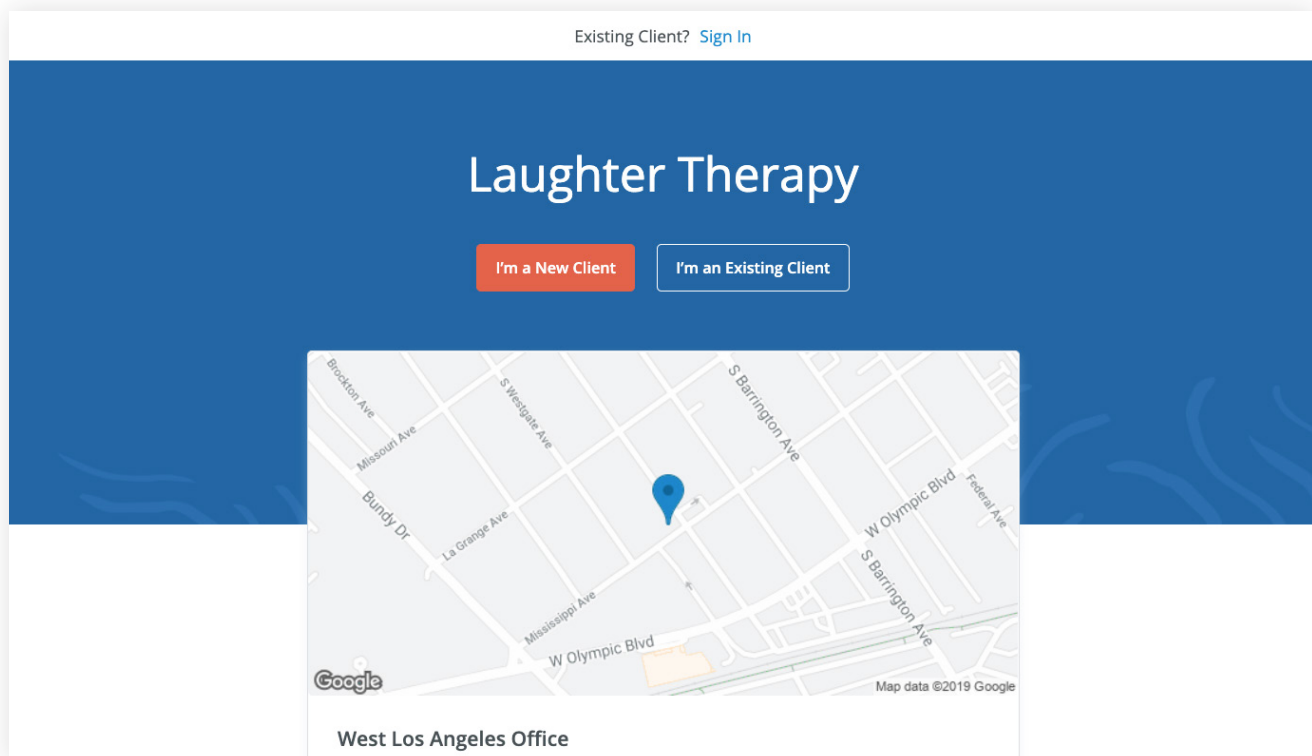
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

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).

Laughter Therapy

Existing client? [Sign In](#)

Request an appointment

1 Choose Clinician

2 Select Service

3 Select Location

4 Select Date & Time

5 Your Information

Will Morales

Select

Jaime Thomas

Select

Jeremy Abbey

Select

4. Select your **service**.

Laughter Therapy

Existing client? [Sign In](#)

Request an appointment

✓ Clinician
Will Morales

2 Select Service

3 Select Location

4 Select Date & Time

5 Your Information

90 Minute Session
1 hour, 30 minutes

Select

Psychotherapy, 45 min
45 minutes

Select

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.

Thank you, Alice!

We will send you a confirmation after your appointment has been confirmed.

 **When**

Mon, Sep 30, 2019
11:15 AM - 12:45 PM
PDT

 **Where**

West Los Angeles Office
[11801 Mississippi Ave](#)
[90025, CA 90025](#)
(123) 123-1212

 **Add to Calendar**

[Google](#)[Apple](#)[Outlook](#)

 **With**

Will Morales

 **What**

90 Minute Session



[Cancel Appointment](#)

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.

Appointments

New appointment? [Request Now](#)

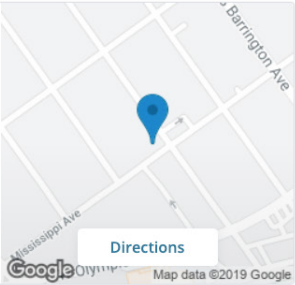
Upcoming [Requested](#)

Sep 30, 2019
11:15 AM—12:45 PM UTC

 Will Morales

 11801 Mississippi Ave
90025, CA 90025

[Add to Calendar](#) [Cancel](#)



[Directions](#)

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.

Laughter Therapy Sign Out

[Appointments](#) [Documents](#) [Billing & Payments](#) [Request Appointment](#)

Appointments

New appointment? [Request Now](#)

[Upcoming](#) [Requested](#)

CANCELLED

Sep 30, 2019

11:15 AM—12:45 PM UTC

Will Morales

11801 Mississippi Ave
90025, CA 90025

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.

How to Pay Your Bills

with  simplepractice

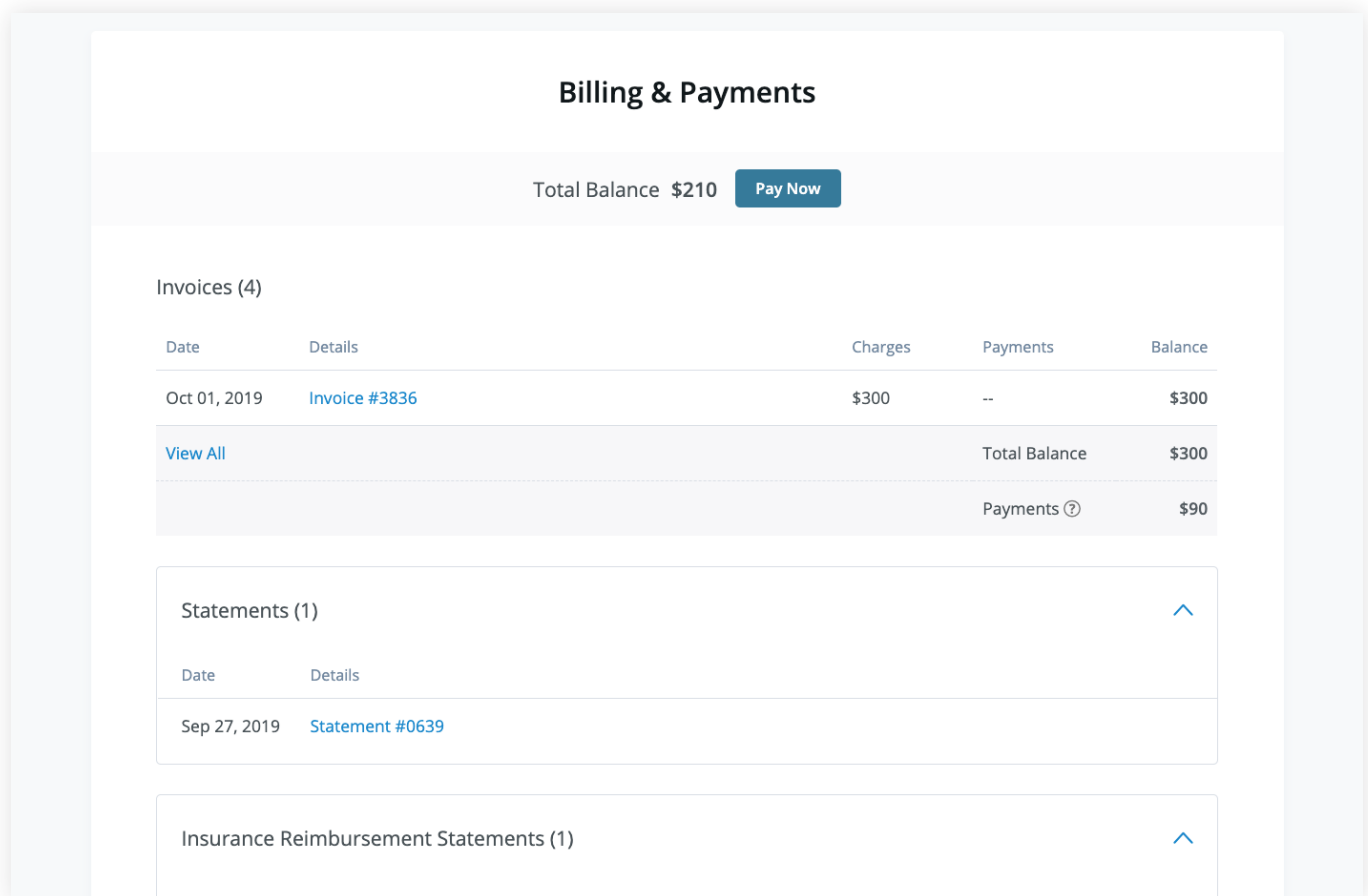
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

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).



The screenshot shows the 'Billing & Payments' page. At the top, it displays 'Total Balance \$210' and a 'Pay Now' button. Below this, there are three main sections: Invoices (4), Statements (1), and Insurance Reimbursement Statements (1). The Invoices section includes a table with columns for Date, Details, Charges, Payments, and Balance. It shows one invoice for Oct 01, 2019, for \$300. There are also links for 'View All' and a summary of 'Total Balance \$300' and 'Payments \$90'. The Statements section shows one statement for Sep 27, 2019. The Insurance Reimbursement Statements section is currently empty.

Billing & Payments

Total Balance \$210 [Pay Now](#)

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	\$300	--	\$300
View All			Total Balance	\$300
			Payments ②	\$90

Statements (1)

Date	Details
Sep 27, 2019	Statement #0639

Insurance Reimbursement Statements (1)

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.

Account History

09/02/2019 - 10/01/2019

All Time

Last 30 days

This Month

Last Month

This Year

Last Year

«

September

»

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
							29	30	1	2	3	4	5
1	2	3	4	5	6	7	6	7	8	9	10	11	12
8	9	10	11	12	13	14	13	14	15	16	17	18	19
15	16	17	18	19	20	21	20	21	22	23	24	25	26
22	23	24	25	26	27	28	27	28	29	30	31	1	2
29	30	1	2	3	4	5							

Payments	Balance
--	\$210
--	CR \$90
--	\$0
(\$30)	CR \$30
--	\$0

Sep 27, 2019	Cash payment	--	(\$150)	CR \$150
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TIP: Once you open a document, you can click **Print** to print it or **Download PDF** to download it to your computer.

×

Statement for Insurance Reimbursement #0730
Emily Okada

DownloadPrint

From

Laughter Therapy
11801 Mississippi Ave
90025, CA 90025

Statement for Insurance Reimbursement

To

Emily Okada
5421 1st St
San Francisco, CA 94118

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.

Laughter Therapy

Sign Out

AppointmentsDocumentsBilling & PaymentsRequest Appointment

Billing & Payments

Total Balance \$210Pay Now

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	\$300	--	\$300
View All			Total Balance	\$300
			Payments ?	\$90

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

The screenshot shows an invoice interface. At the top, there's a header with a close button (X), the invoice number **Invoice #3836**, the client name **Emily Okada**, and three buttons: **Download**, **Print**, and **Pay Now**. A red arrow points to the **Pay Now** button. Below the header, the invoice details are organized into sections. The 'From' section lists 'Laughter Therapy' with an address in CA 90025. The 'To' section lists 'Emily Okada' with an address in Santa Monica, CA 90401. The 'Invoice' section shows the invoice number #3836 and issue date 10/01/2019. The 'Client' section shows 'Emily Okada' and a phone number. The 'Provider' section shows 'Will Morales' with a tax ID and NPI number. A large blue square is present on the right side of the invoice details.

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.

The screenshot shows a 'Billing & Payments' modal with a 'Make a payment' form. The form has a close button (X) in the top right. It contains fields for 'Cardholder's name' (Emily Okada), 'Card number' (Card Number), 'Expiration' (MM / YY), 'Security code' (CVC), and 'Billing zipcode'. There is a 'Save Card' checkbox which is checked. At the bottom, there are 'Cancel' and 'Pay \$360' buttons.



Congratulations!

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