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Complete Guide to the Client Portal

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1
How to Log in to the Client Portal

GETTING STARTED GUIDE

The Client Portal

with simplepractice

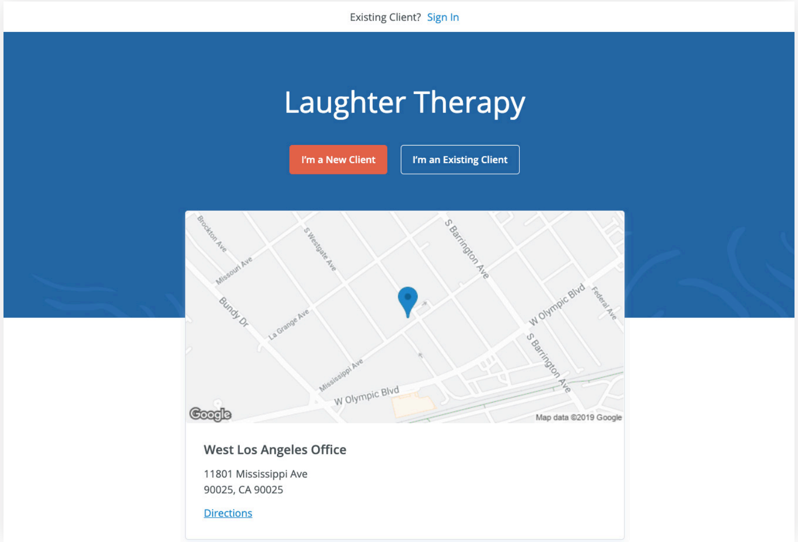
The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your session fees.

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 that looks like this:

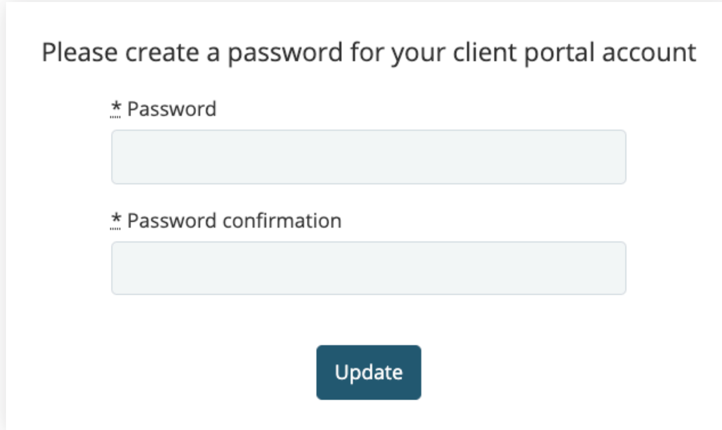
> Hi Alice,
>
> Your Appointment on Monday, September 30th at 11:15 AM (PDT) with Will Morales has been confirmed.
>
> Before we meet, I would like you to review my practice documents and provide some information about yourself. This will help us get started.
>
> Please click on this secure link below 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**.

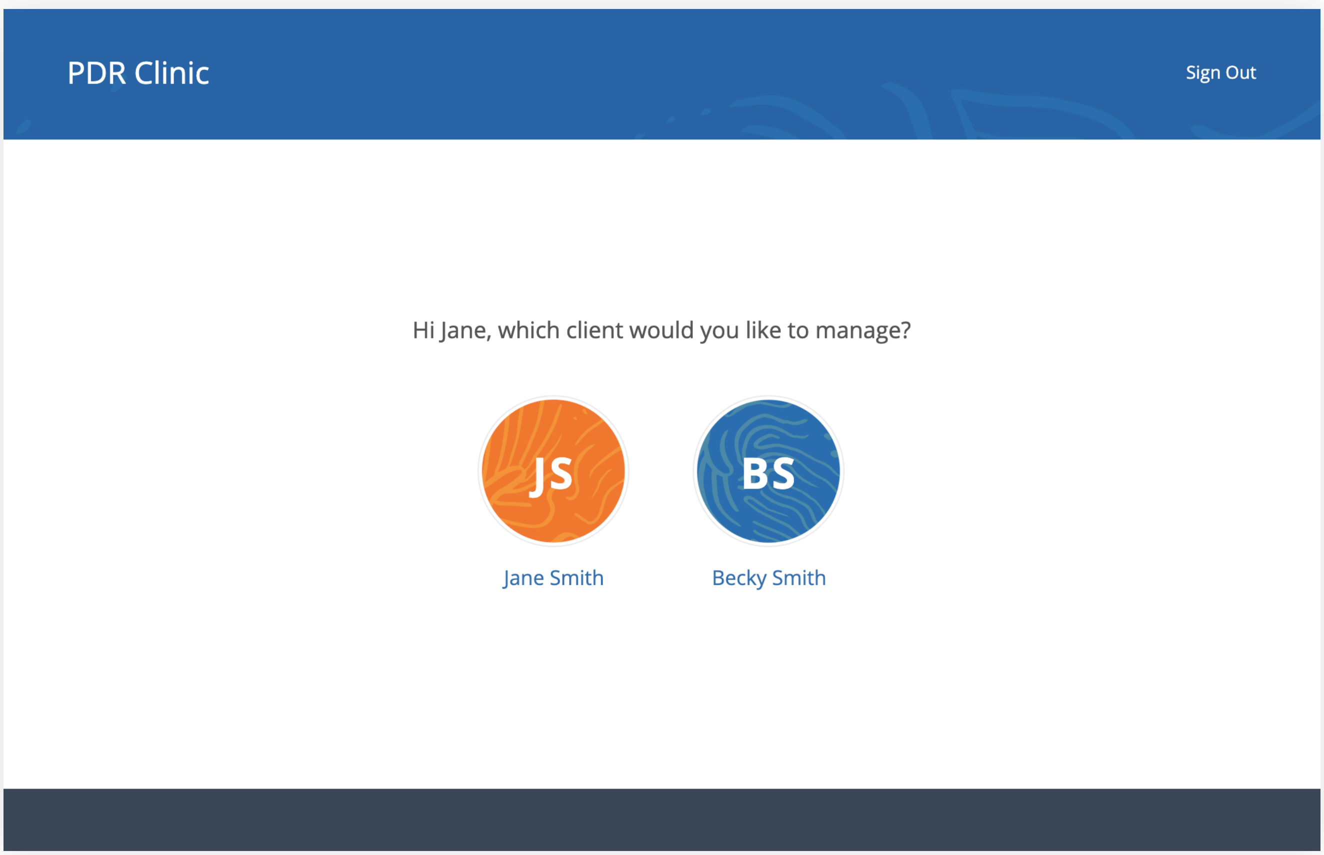
You will now be able to login to the Client Portal at any time, using your email address as your username and the password that you created above.



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

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.

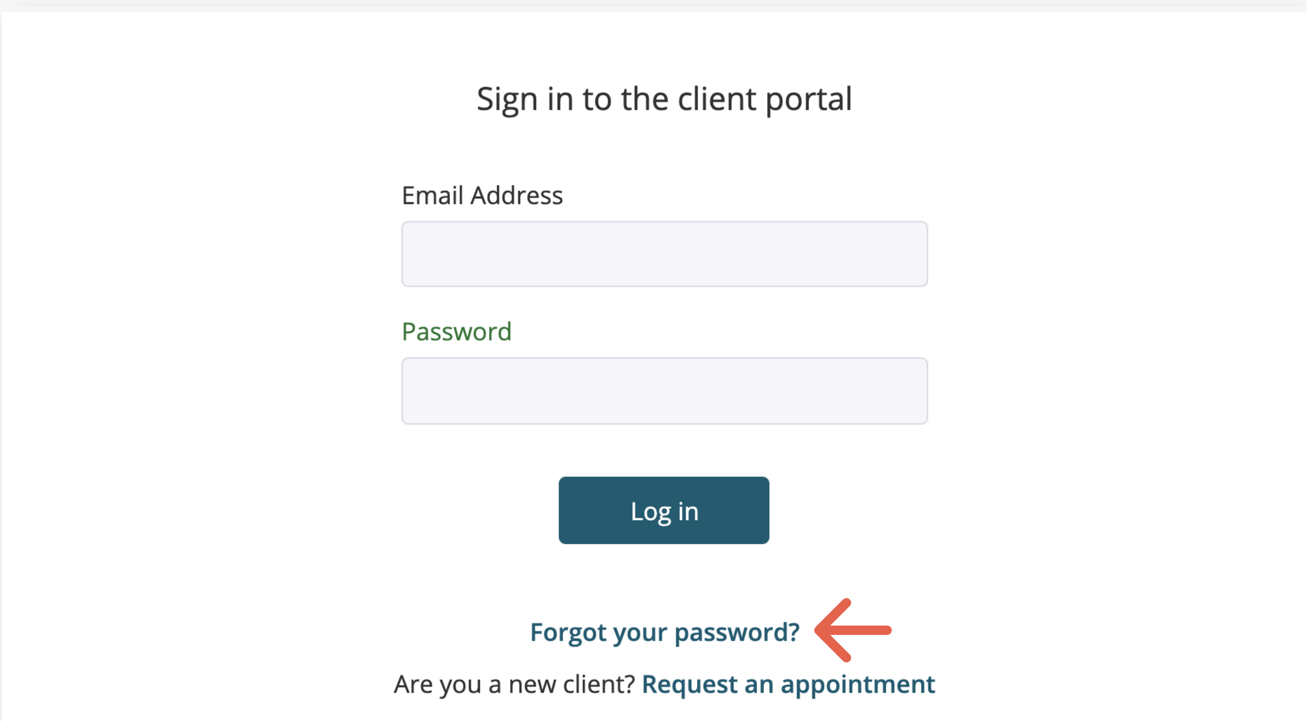


TROUBLESHOOTING

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. 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 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 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

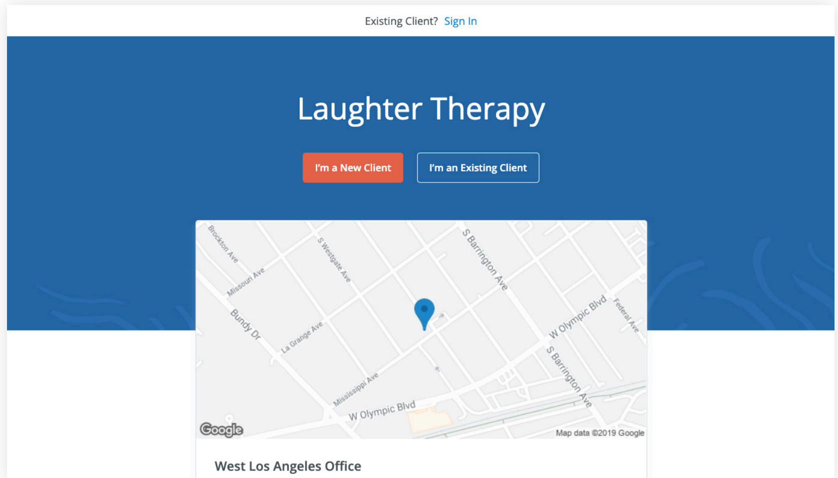


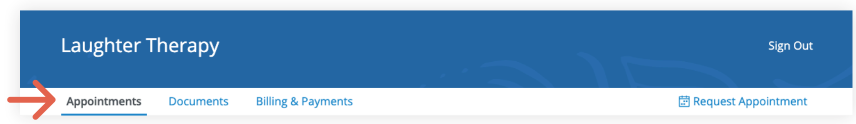
ONLINE BOOKING

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.

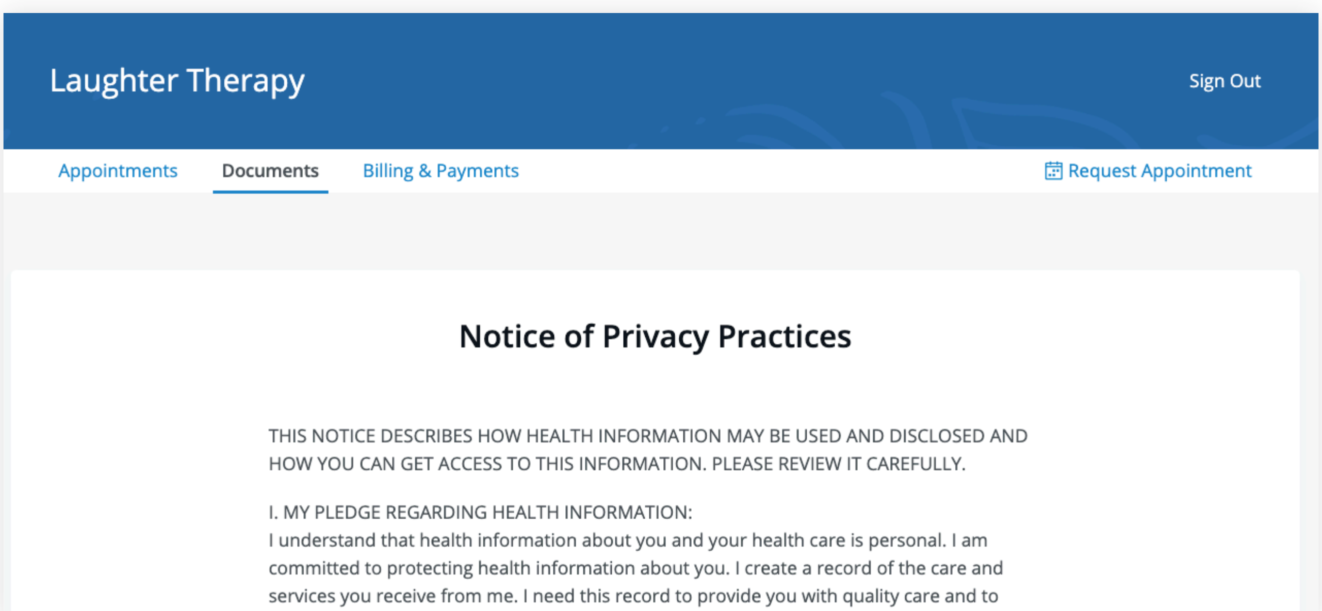
1. Go to your clinician's Client Portal and click Existing Client to log in. (The New Client button is only for clients who have never logged into the Client Portal before).
2. Navigate to the appointments tab. (This may already be selected by default after you log in).



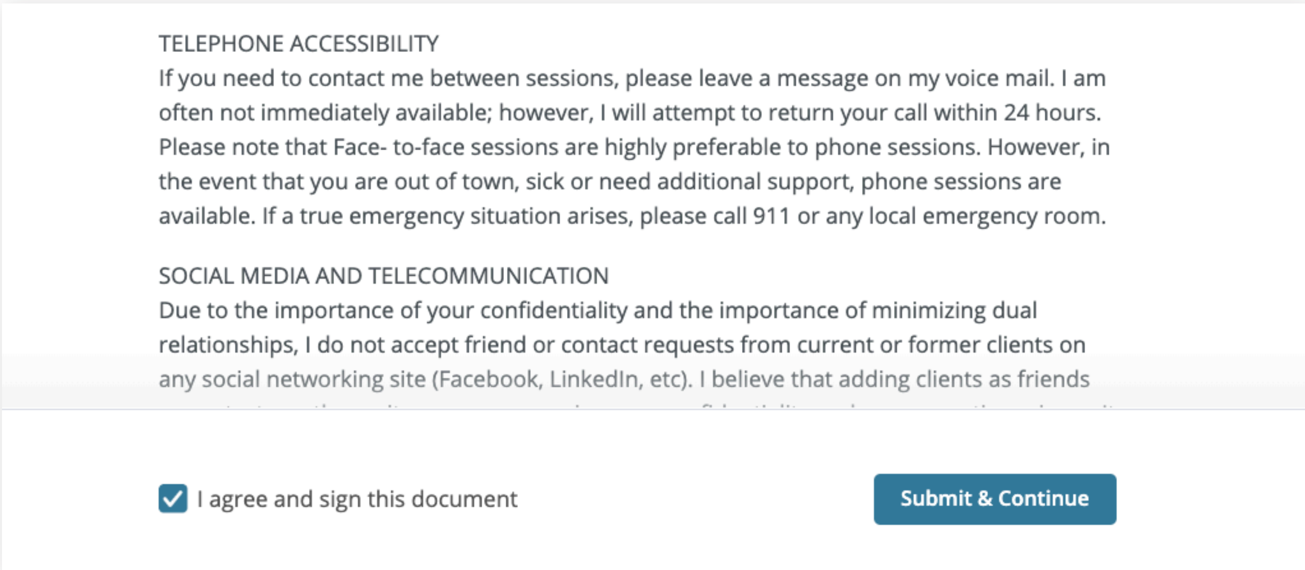


DOCUMENTS AND FORMS

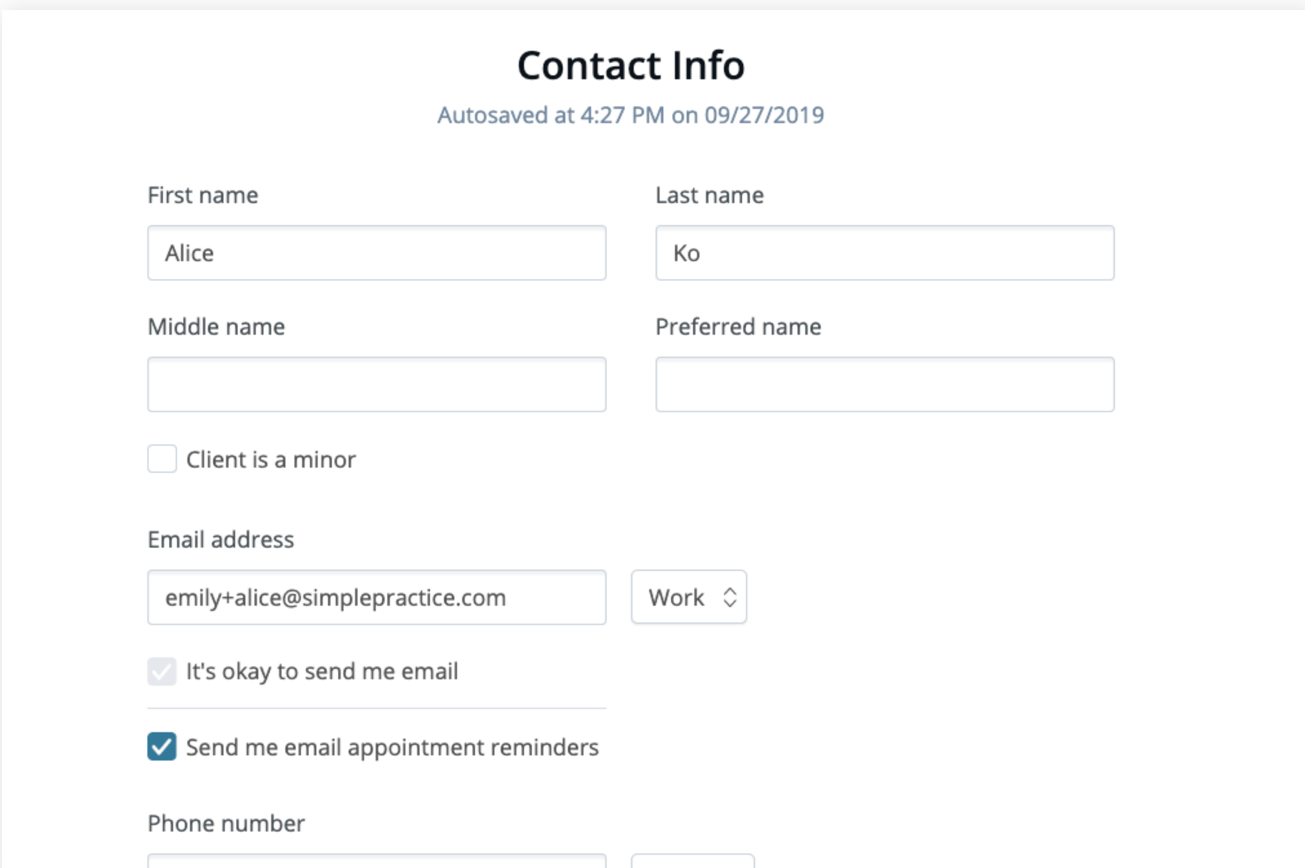
The first time you log into the Client Portal, you'll see a welcome message from your clinician. After you click **Get Started**, you'll start filling out forms from your clinician.



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.

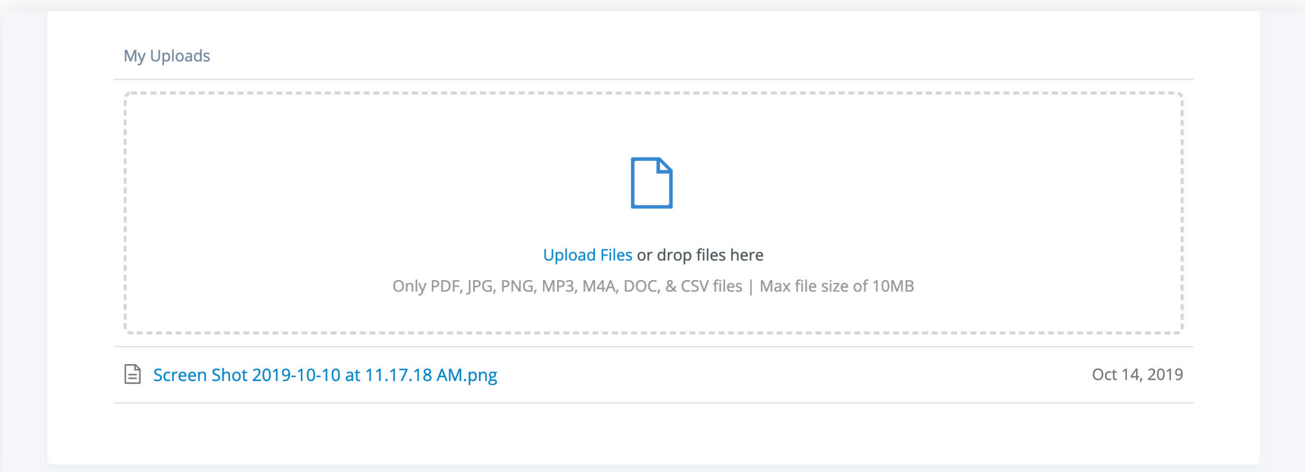


After signing documents, you may be asked to fill out your contact details, demographics, credit card, and insurance information.



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

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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:

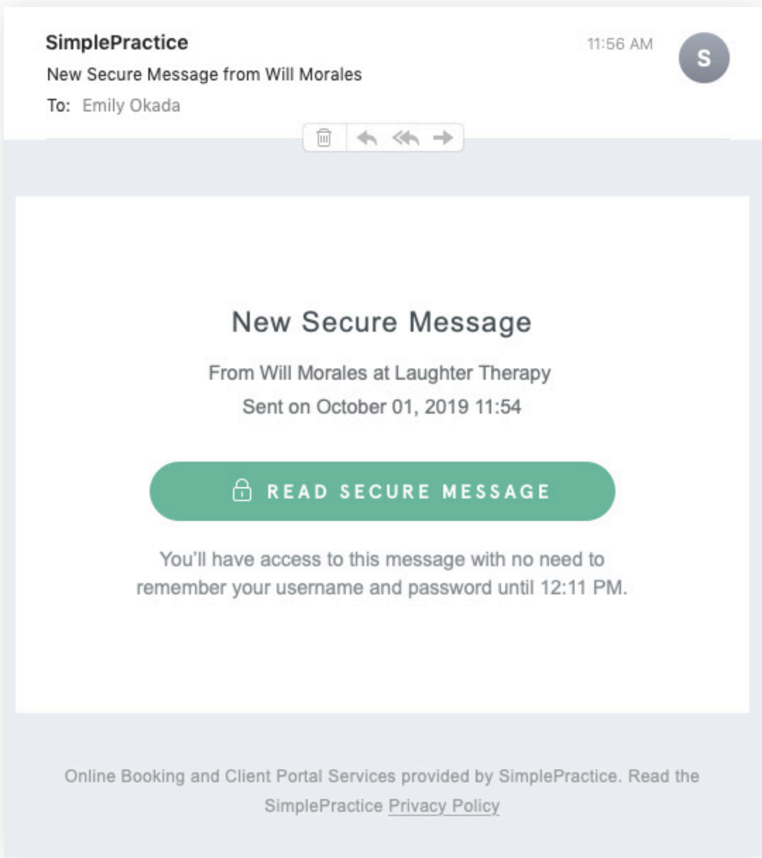
1. Message notifications

2. How to reply

MESSAGE NOTIFICATIONS

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

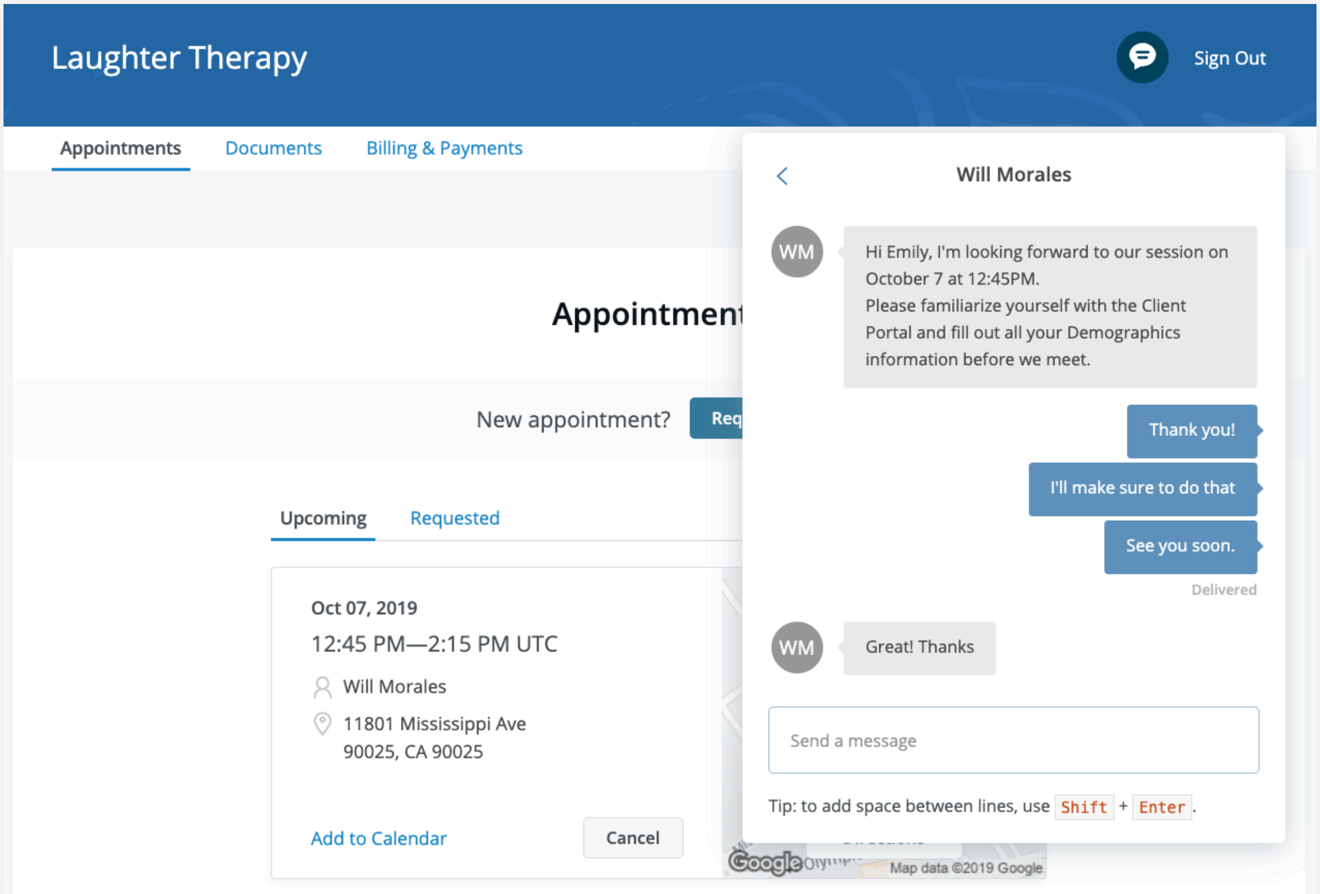
1. Click on the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**.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