



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.

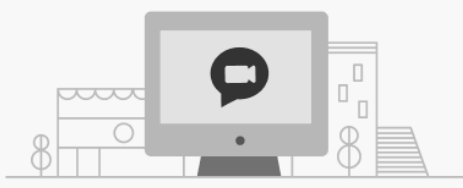
Thank you!

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

Olive Branch Clinic

IM A NEW CLIENT

IM AN EXISTING CLIENT

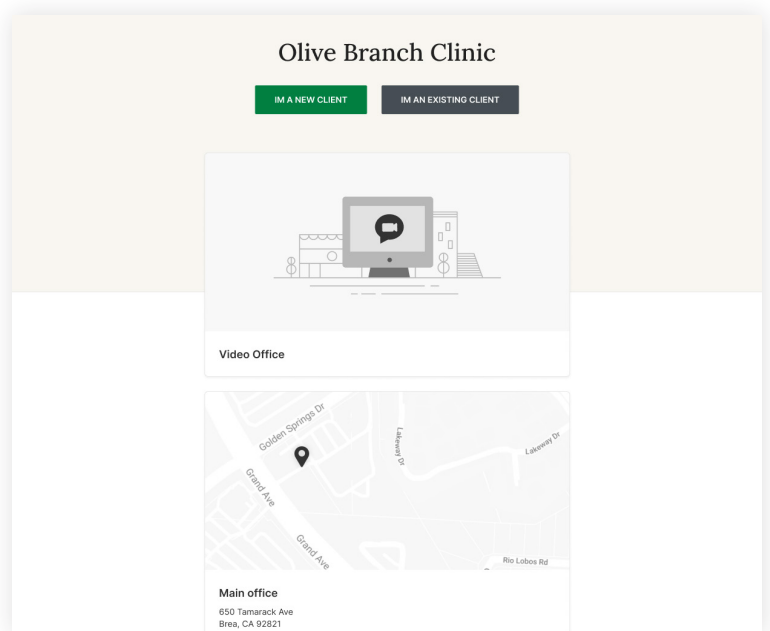


To log back in:

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

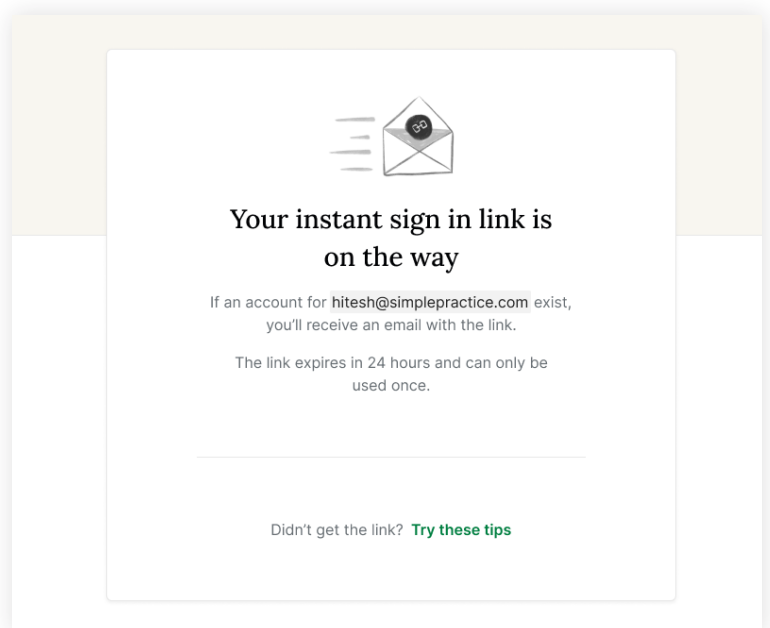
Tip: Bookmark this page so you can log back in easily in the future.

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



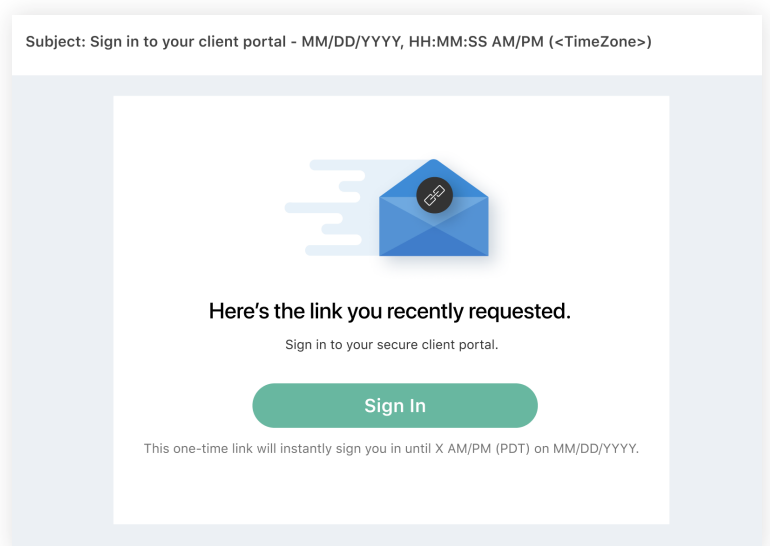
4. Check your inbox to find the sign-in email. Keep in mind that the link in the email is valid for 24 hours and can **only** be used to sign in once.

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.

Which profile would you like to manage?



Hitesh Solanki



Chris Burmah



Philip Martelly



Josh Thompson



Brandon Barrier



Jimmy Noid



TJ Alan

TROUBLESHOOTING SIGN-IN ISSUES

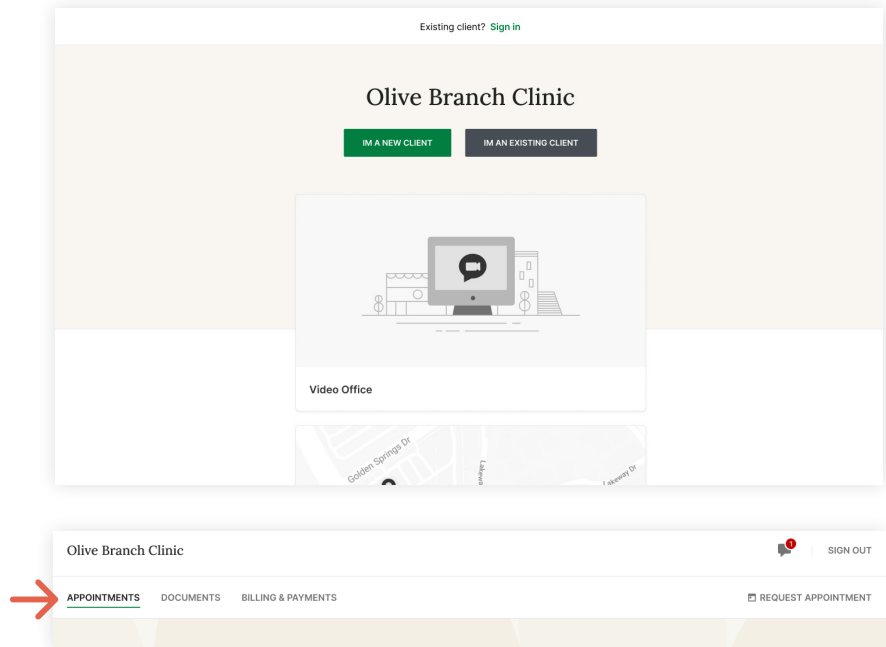
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from no-reply@simplepractice.com. Add this address as 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 **Sign here** at the bottom of the page.

your privacy. However, if you acknowledge me first, I will be more than happy to speak briefly with you, but feel it appropriate not to engage in any lengthy discussions in public or outside of the therapy office.

BY CLICKING ON THE CHECKBOX BELOW I AM AGREEING THAT I HAVE READ, UNDERSTOOD AND AGREE TO THE ITEMS CONTAINED IN THIS DOCUMENT.



Sign here

By adding your signature, you are
eSigning this form

Submit & Continue

Enter your name and your relationship to the client, and click **Save Changes**.

Suspicious as stated above in the case of an elderly person who may be subjected to these abuses.

Suspected neglect of the parties named in items #3 and # 4.

If a court of law issues a legitimate subpoena for information stated on the subpoena.

Create Your Signature



Your Name

Isabella Jones

Preview



Signed by Isabella Jones
Client
March 1, 2021 1:30 PM

Relationship to Client

Client

Updating your information here will be applied to all future signatures.

Cancel

Save Changes

Submit & Continue

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 **Sign in** 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.

From yourprovider@simplepractice.com
Subject Welcome from Sasha Test

New Secure Message

You have a new secure message from Will Morales at Olive Branch Clinic. Sign in to read it.

Sign In

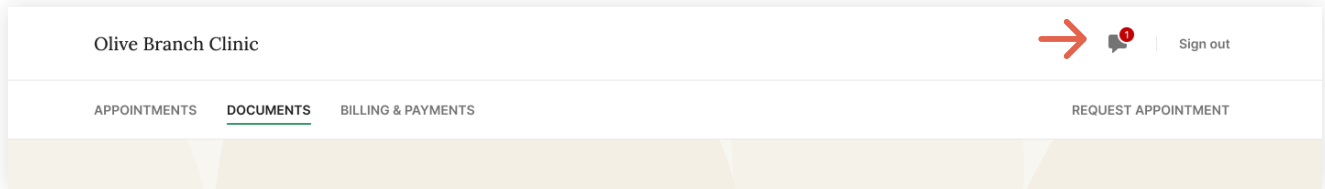
This one-time link will instantly sign you in until X AM/PM (PDT) on MM/DD/YYYY

Online Booking and Client Portal Services provided by SimplePractice. Read the SimplePractice [Privacy Policy](#)

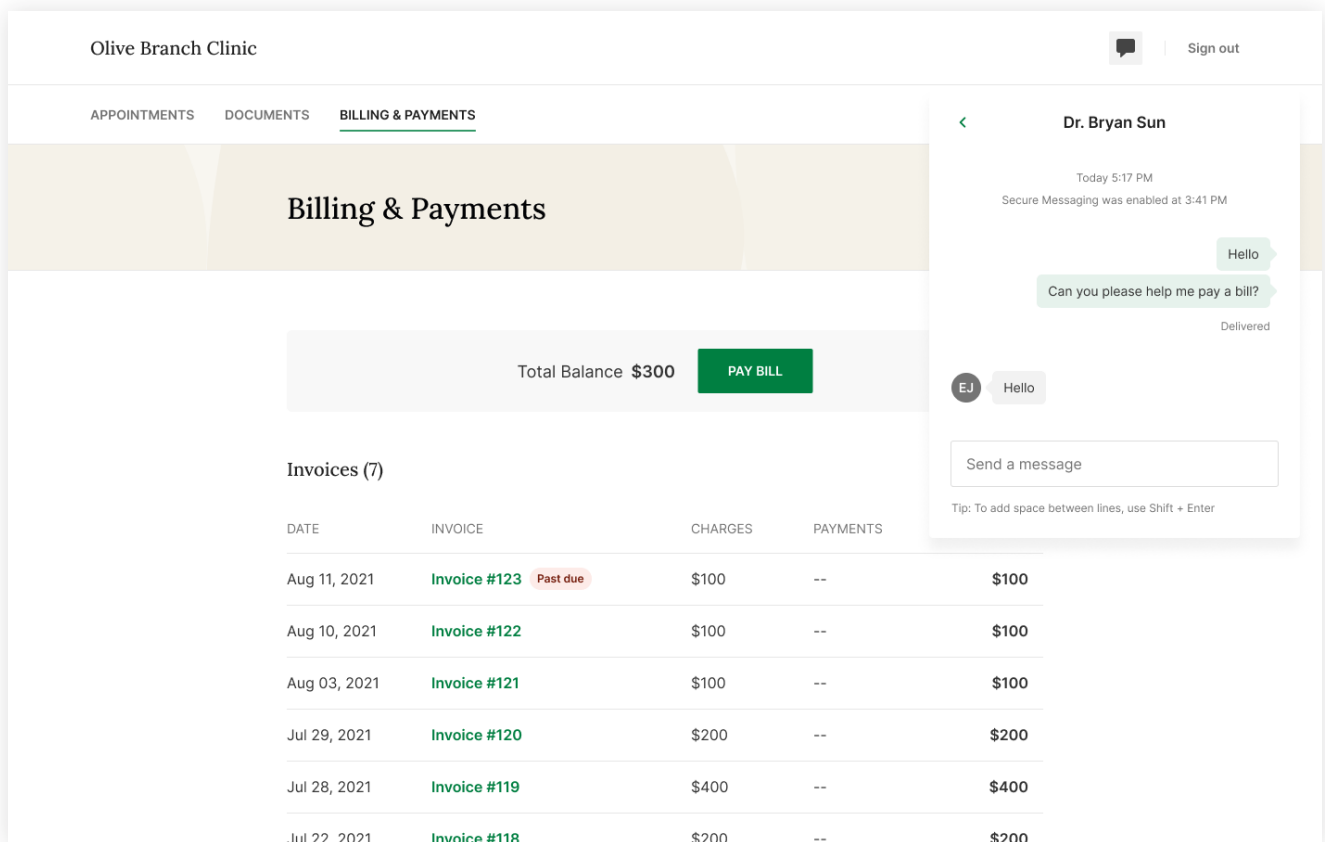
NOTE: After 15 minutes pass from when you receive the email, you'll have to log in to view your message through the Sign In link you'll receive via email.

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.

Then, click **Submit & Continue** to move to the next document.

If a court of law issues a legitimate subpoena for information stated on the subpoena.

If a client is in therapy or being treated by order of a court of law, or if information is obtained for the purpose of rendering an expert's report to an attorney.

Occasionally I may need to consult with other professionals in their areas of expertise in order to provide the best treatment for you. Information about you may be shared in this context without using your name.

If we see each other accidentally outside of the therapy office, I will not acknowledge you first. Your right to privacy and confidentiality is of the utmost importance to me, and I do not wish to jeopardize your privacy. However, if you acknowledge me first, I will be more than happy to speak briefly with you, but feel it appropriate not to engage in any lengthy discussions in public or outside of the therapy office.

BY CLICKING ON THE CHECKBOX BELOW I AM AGREEING THAT I HAVE READ, UNDERSTOOD AND AGREE TO THE ITEMS CONTAINED IN THIS DOCUMENT.



Signed by Isabella Jones
Client
March 1, 2021 1:34 PM

Submit & Continue

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

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

Needs to be completed

DATE RECEIVED

Questionnaire

May 06, 2020

Credit Card Information

May 06, 2020

Completed

DATE RECEIVED

HIPAA Form

May 06, 2020

Consent Form Title

May 06, 2020

Practice Policies

May 06, 2020

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

Choose file or drag and drop file

Optional description text area



Congratulations!

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

GETTING STARTED GUIDE

How to Request Appointments

with  simplepractice

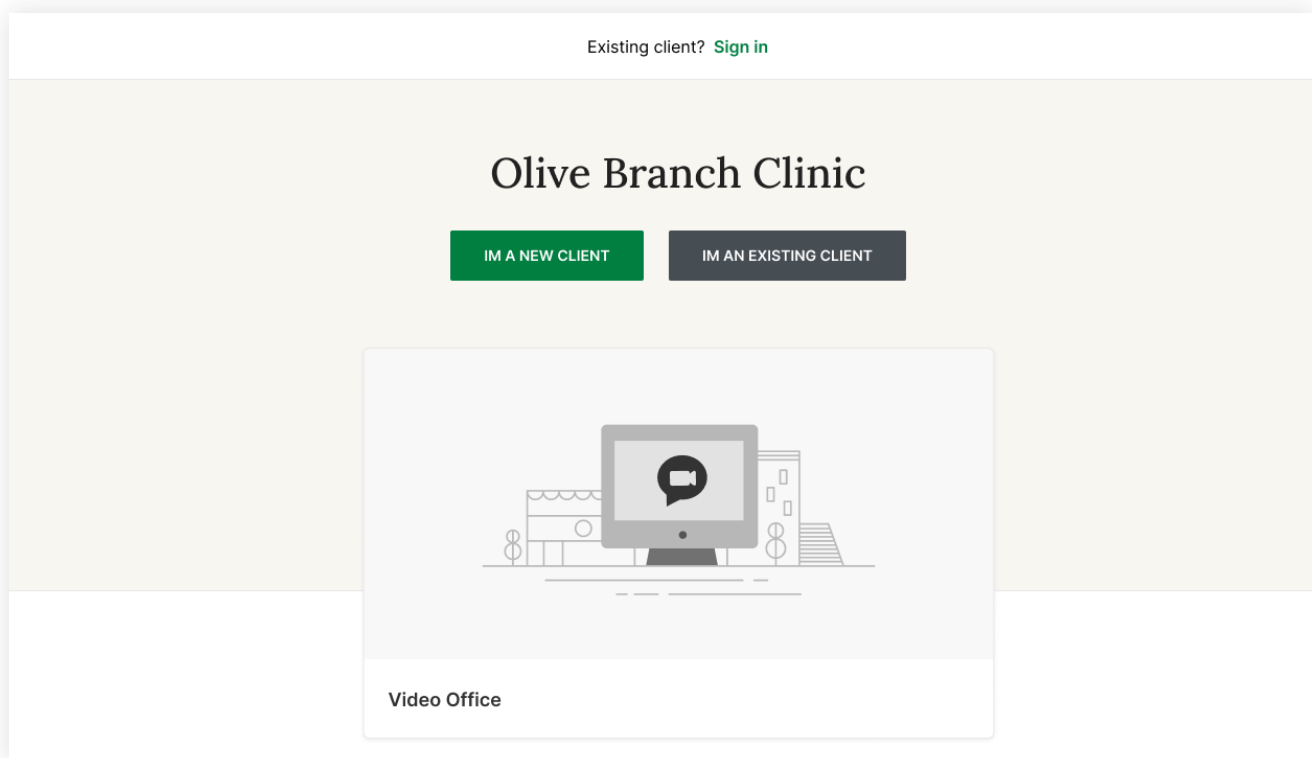
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

SECTIONS:

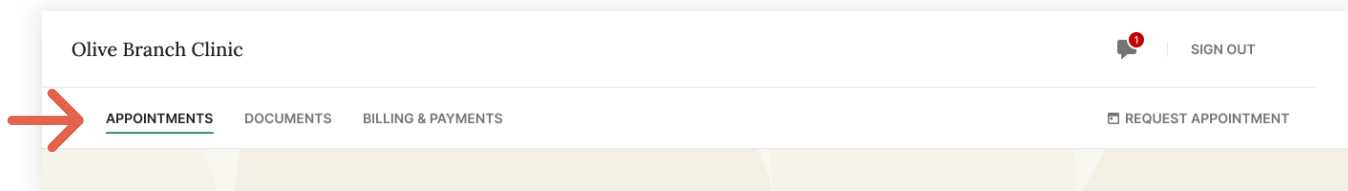
1. Request an appointments
2. Cancelling requests

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 **service**.

Olive Branch Clinic

 | [SIGN OUT](#)

[< Appointments](#)

Request appointment

1 Select service

2 Select location

3 Select time and date

4 Select client

5 Your information

Already a client? To request an appointment, [Sign in](#)

Psychotherapy, 45 min
50 minutes

SELECT

Psychotherapy, 45 min
50 minutes

SELECT

Psychotherapy, 45 min
50 minutes

SELECT

4. Choose your **office location**.

Olive Branch Clinic

 | [SIGN OUT](#)

[< Appointments](#)

Request appointment

✓ Service

Psychotherapy,
60 min 1 hour

2 Select location

3 Select time and date

4 Select client

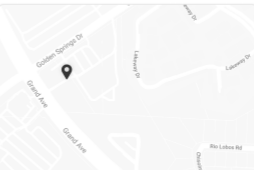
5 Your information



Video Office

(909) 497-9954

SELECT



Main Office

123 Main Street
Los Angeles, CA 91101
(909) 497-9954

SELECT

5. Choose the **date and time** that you'd like.

Olive Branch Clinic

SIGN OUT

< Appointments

Request appointment

✓ Service

Psychotherapy,
60 min 1 hour

✓ Select location

Main Office
123 Main Street
Los Angeles, CA 91101
(310) 459-8816

3 Select Time and Date

4 Select Client

5 Your Information

Existing client? [Sign in](#)

< August 2021 >

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	★ Today	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

Show availability for:

☒ Mornings

☒ Evenings

Availability on Thu, July 20, 2021

Viewing in EDT [Change](#)

Morning	Afternoon	Evening
📞 7:00 AM	1:00 PM	1:00 PM
📞 8:00 AM	2:00 PM	2:00 PM
📞 9:00 AM	3:00 PM	--
	4:00 PM	--
	More times	

6. Select who the appointment is for.

Olive Branch Clinic

SIGN OUT

< Appointments

Request appointment

✓ Service

Psychotherapy,
60 min 1 hour

✓ Select location

Main Office
123 Main Street
Los Angeles, CA 91101
(310) 459-8816

✓ Select location

Tue, Aug 10, 2021
8:35 AM - 9:25 AM PDT

4 Select Client

5 Your Information

Who is this appointment for?

You can request this appointment for yourself, on behalf of someone else, or for both you and your partner. Please choose below.

☒ Me

☐ Someone else

☐ My partner and me

Appointment requests will be confirmed by the practice.

[NEXT](#)

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, Hitesh!

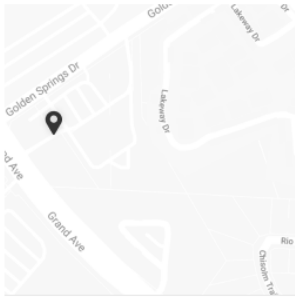
We will send you a confirmation after your appointment has been confirmed

☒ **When**
Tue, Aug 10, 2021
8:35 AM - 9:25 AM PDT

☐ **With**
Dr. Bryan Sun

☐ **What**
Psychotherapy, 45min

☒ **Where**
Main Office
123 Main Street
Los Angeles, CA 91101
(310) 459-8816



☒ **Add to calendar**

[GOOGLE](#) [APPLE](#) [OUTLOOK](#)

[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

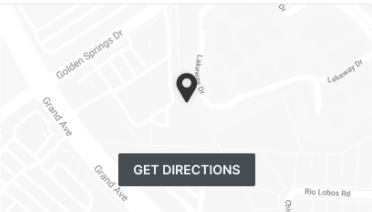
New appointment?

REQUEST NOW

UPCOMING

REQUESTED

AUG 10, 2021
8:35 PM - 9:25 AM PDT
Bryan Sun
Main Office
Add to calendar · Call to cancel (999) 888-7777



GET 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.

The screenshot shows the 'Olive Branch Clinic' client portal. At the top, there's a navigation bar with 'APPOINTMENTS' (underlined), 'DOCUMENTS', and 'BILLING & PAYMENTS'. A 'REQUEST APPOINTMENT' button is on the right. Below the navigation bar is a large header 'Appointments'. Underneath, there's a section for 'New appointment?' with a 'REQUEST NOW' button. Below that, there are two tabs: 'UPCOMING' (underlined) and 'REQUESTED'. Under the 'UPCOMING' tab, there's a card for a cancelled appointment. The card has a red 'Cancelled' label, the date 'OCT 14, 2021', the time '12:55 PM — 1:45 PM PDT', and the doctor 'Dr. Bryan Sun'. To the right of the card is an illustration of a computer monitor with a speech bubble icon.

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.

Please send a message through the portal instead of calling

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

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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. You'll see three sections for **Invoices**, **Statements**, and **Insurance Reimbursement Statements** (superbills).

Billing & Payments

Total Balance \$300

[PAY BILL](#)

Invoices (7)

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	Invoice #123 Past due	\$100	--	\$100
Aug 10, 2021	Invoice #122	\$100	--	\$100
Aug 03, 2021	Invoice #121	\$100	--	\$100
Jul 29, 2021	Invoice #120	\$200	--	\$200
Jul 28, 2021	Invoice #119	\$400	--	\$400
Jul 22, 2021	Invoice #118	\$200	--	\$200

[View all](#)

Total Balance \$1000

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	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	Invoice #123 Past due	\$100	--	\$100
Aug 10, 2021	Invoice #122	\$100	--	\$100
Aug 03, 2021	Invoice #121	\$100	--	\$100
Aug 03, 2021	Card payment	--	(\$100)	\$100
Jul 29, 2021	Invoice #120 Paid	\$200	--	\$200
Jul 28, 2021	Invoice #119	\$400	--	\$400
Jul 22, 2021	Invoice #118	\$200	--	\$200

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

Account History⬆

Date Range: All Time📅

⬅

All Time	«	September							October							»
Last 30 days	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	BALANCE	
This Month	29	30	31	1	2	3	4	26	27	28	29	30	1	2	\$300	
Last Month	5	6	7	8	9	10	11	3	4	5	6	7	8	9	\$0	
This Year	12	13	14	15	16	17	18	10	11	12	13	14	15	16	\$150	
Last Year	19	20	21	22	23	24	25	17	18	19	20	21	22	23	\$0	
	26	27	28	29	30	1	2	24	25	26	27	28	29	30	\$0	
								31	1	2	3	4	5	6		

Mar 11, 2021

Invoice #1094

Paid

\$150

--

\$150

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
540 1st St
San Francisco, CA 94104

MAKING PAYMENTS

→ *Not available currently.*

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.

Olive Branch Clinic

 | SIGN OUT

APPOINTMENTSDOCUMENTSBILLING & PAYMENTS

REQUEST APPOINTMENT

Billing & Payments

Total Balance \$300

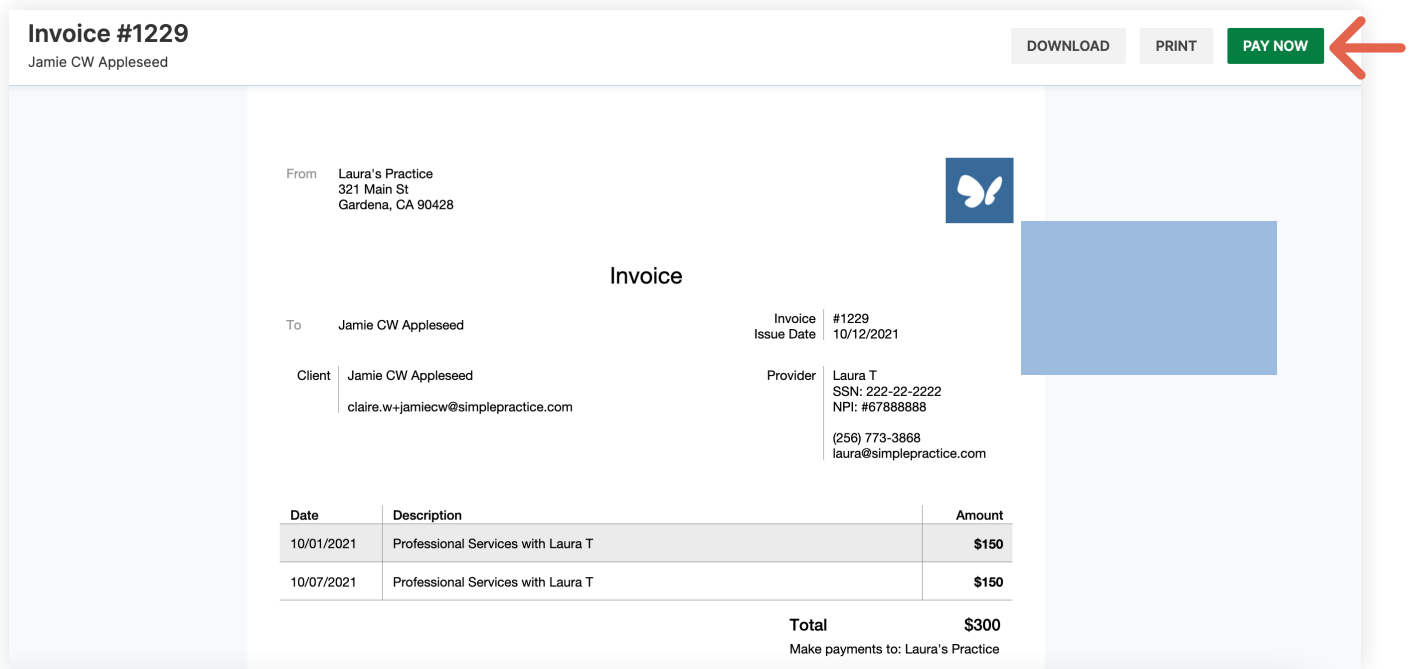
PAY BILL



Invoices (7)

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	Invoice #123 Past due	\$100	--	\$100
Aug 10, 2021	Invoice #122	\$100	--	\$100

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



Invoice #1229
Jamie CW Appleseed

From: Laura's Practice
321 Main St
Gardena, CA 90428

To: Jamie CW Appleseed

Client: Jamie CW Appleseed
claire.w+jamiecw@simplepractice.com

Invoice #1229
Issue Date: 10/12/2021

Provider: Laura T
SSN: 222-22-2222
NPI: #67888888
(256) 773-3868
laura@simplepractice.com

Date	Description	Amount
10/01/2021	Professional Services with Laura T	\$150
10/07/2021	Professional Services with Laura T	\$150

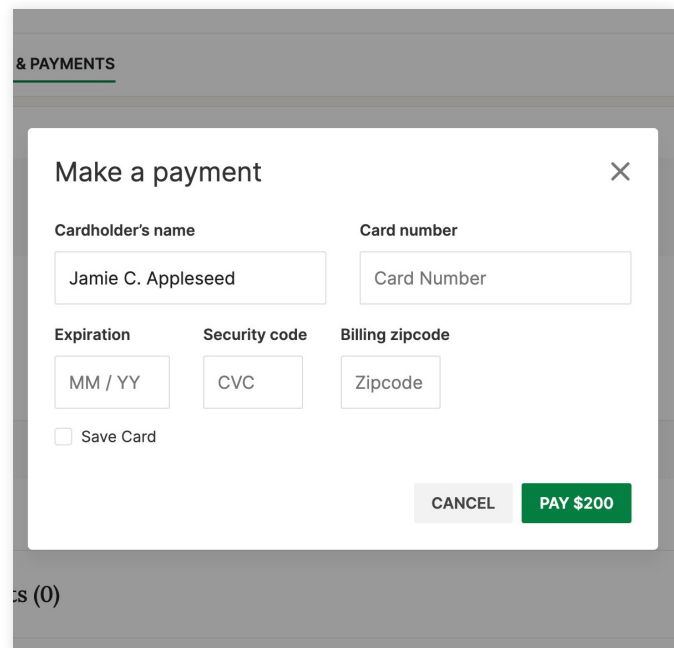
Total \$300
Make payments to: Laura's Practice

Buttons: DOWNLOAD, PRINT, **PAY NOW** (highlighted with a red arrow)

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.



& PAYMENTS

Make a payment X

Cardholder's name: Jamie C. Appleseed

Card number: Card Number

Expiration: MM / YY

Security code: CVC

Billing zipcode: Zipcode

☐ Save Card

CANCEL PAY \$200



Congratulations!

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