



# 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.

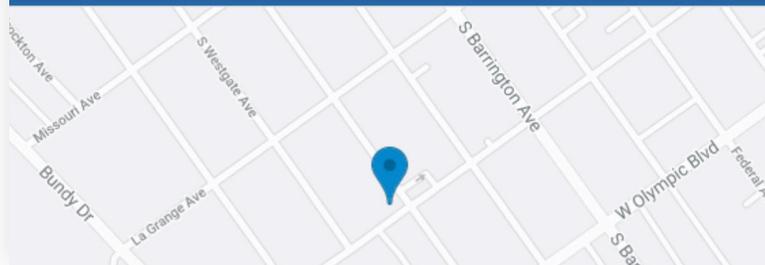
Thank you!

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

## Olive Branch Clinic

I'm a New Client

I'm an Existing Client

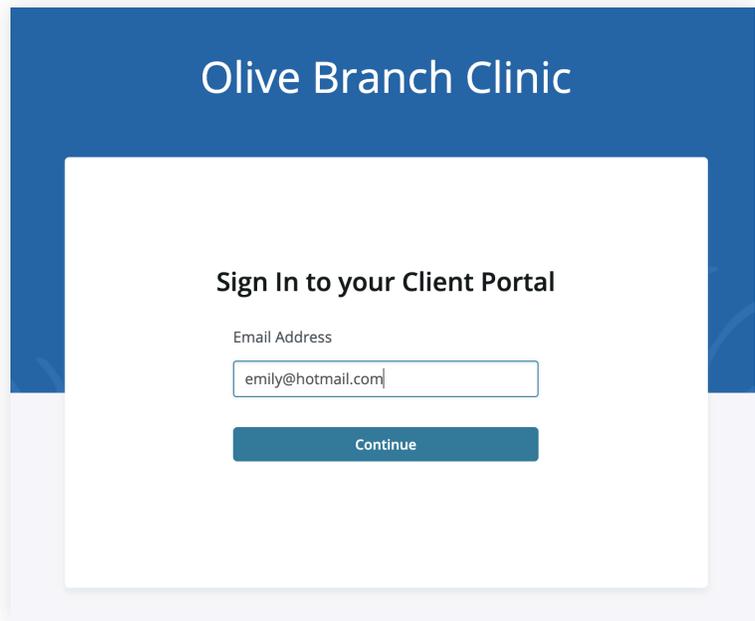


To log back in:

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**. You'll receive an **email with a link** to log into your Client Portal.



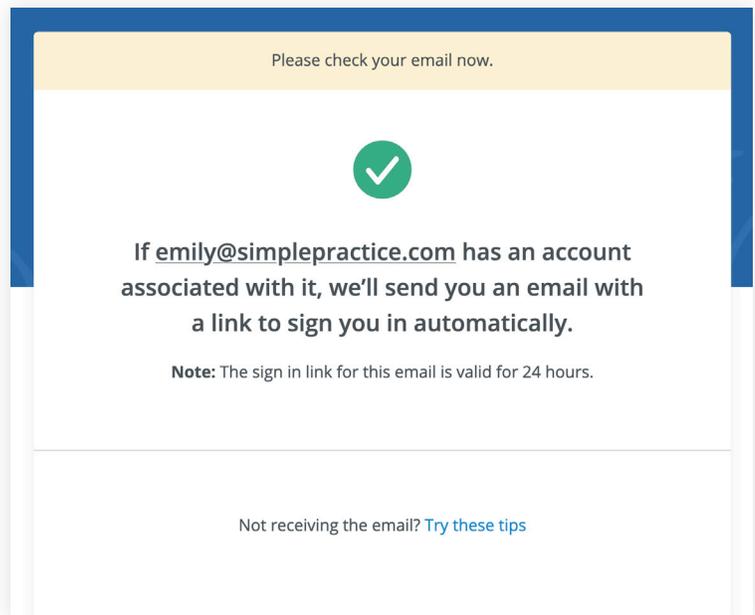
Olive Branch Clinic

### Sign In to your Client Portal

Email Address

Continue

4. You'll see this message that asks you to check your email. If you're not receiving the email, you can click **Try these tips** for troubleshooting.



Please check your email now.

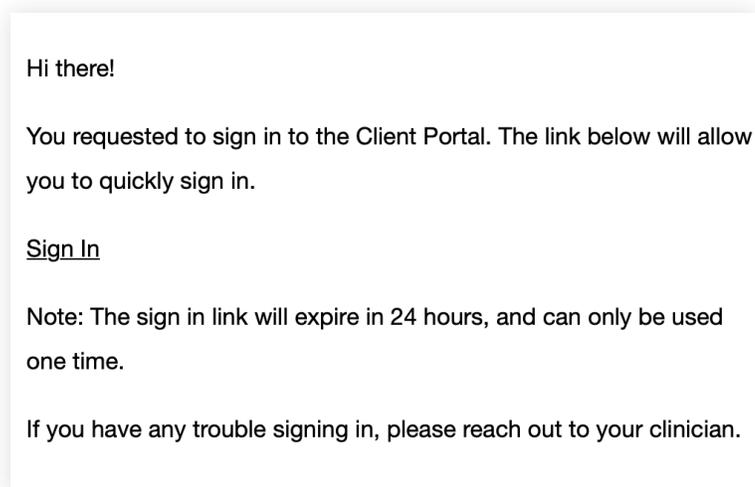


If [emily@simplepractice.com](mailto:emily@simplepractice.com) has an account associated with it, we'll send you an email with a link to sign you in automatically.

**Note:** The sign in link for this email is valid for 24 hours.

Not receiving the email? [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.



Hi there!

You requested to sign in to the Client Portal. The link below will allow you to quickly sign in.

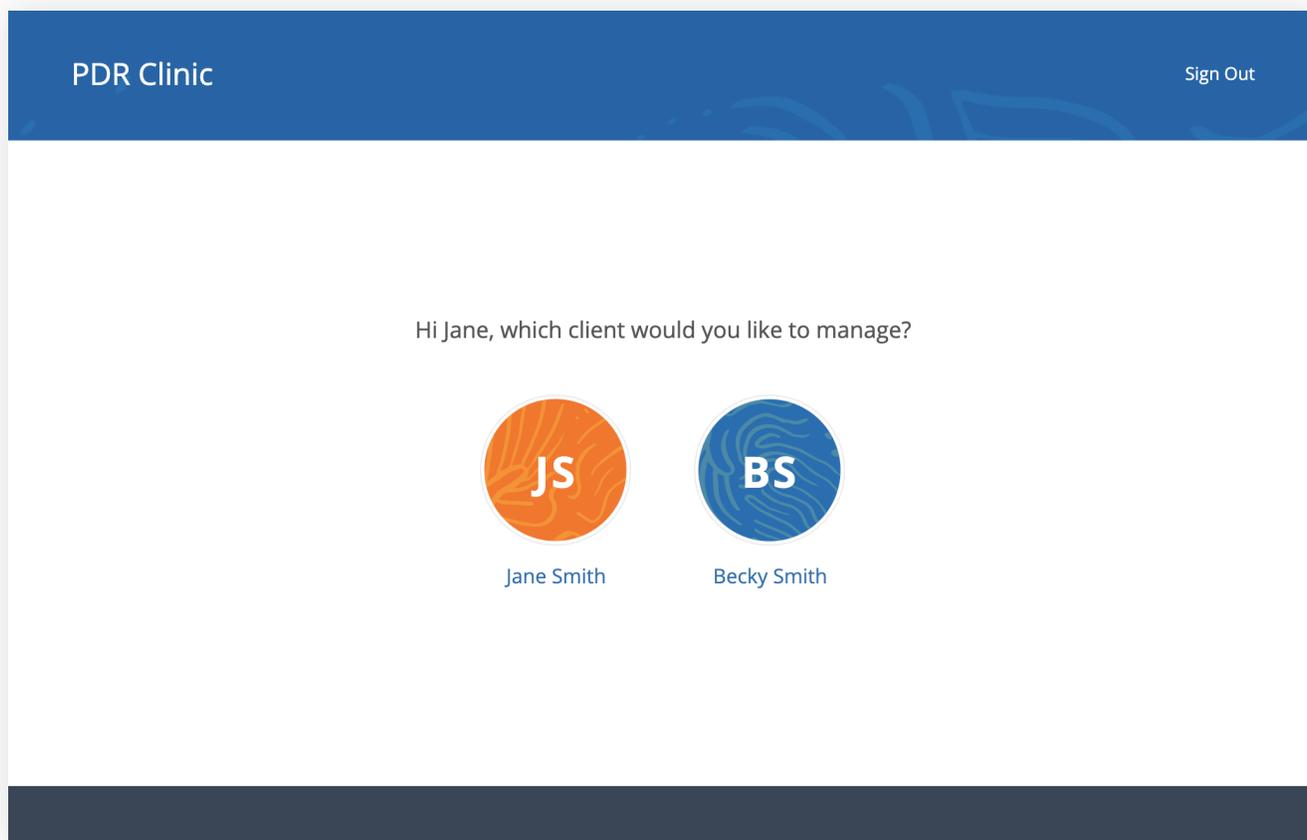
[Sign In](#)

**Note:** The sign in link will expire in 24 hours, and can only be used one time.

If you have any trouble signing in, please reach out to your clinician.

## MINORS MANAGEMENT

If your clinician is seeing both you and a minor client(s) you're the guardian for, they can give you Client Portal access for both profiles. If that's the case, you'll see multiple icons upon logging in so you can select the profile you want to manage.



## TROUBLESHOOTING

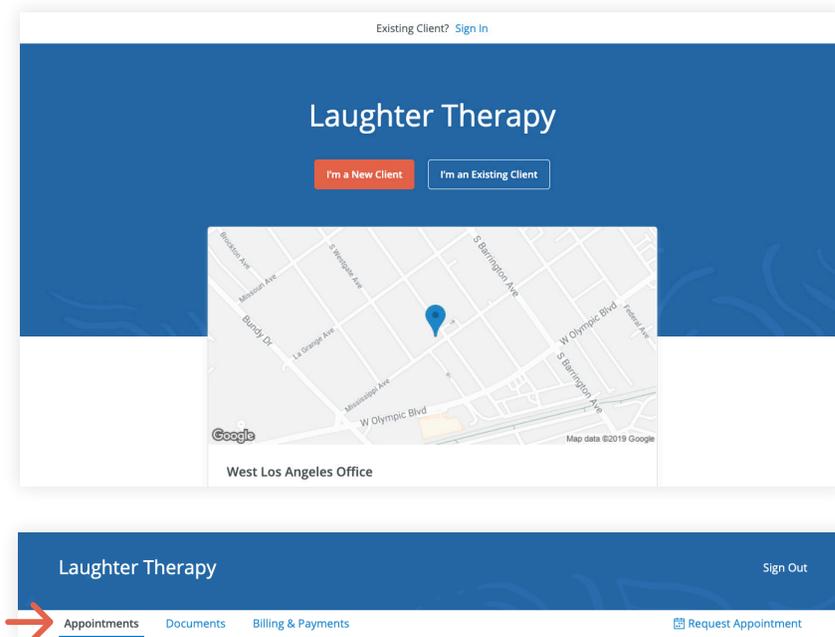
1. Check your **spam folder** and any other folders in your inbox for an email from the address `no-reply@simplepractice.com`. You can also add this address to your address book to make delivery easier.
2. Be mindful of any **auto-fillers** enabled in your browser that might be entering information for you. If the auto-filler replaces the information you type, your email address will be entered incorrectly.
3. 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 correct.
4. The same email can't be used for more than one portal account for the same clinician. Be sure to use the same email address that you normally use to log into your Client Portal.

## 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.

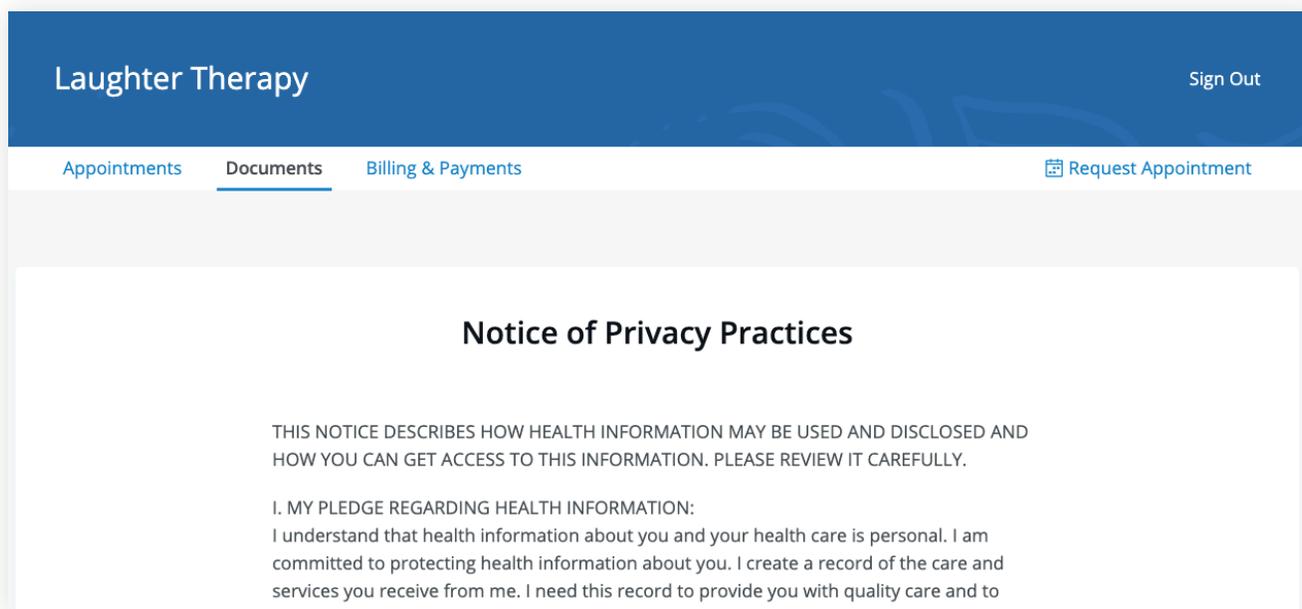
To request appointments through the Client Portal:

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.

The screenshot shows the Olive Branch Clinic interface. At the top, there's a blue header with the clinic name and a 'Sign Out' button. Below the header, there are navigation tabs: 'Appointments', 'Documents' (which is selected), and 'Billing & Payments'. A 'Request Appointment' button is also visible. The main content area is titled 'Documents, Forms and Files' and contains two sections: 'Needs to be completed' and 'Completed'. Each section has a table of documents with their names and dates.

Needs to be completed	Date received
<a href="#">Standard Intake Questionnaire Template</a>	Sep 27, 2019

Completed	Date completed
<a href="#">ABA Child Intake Form</a>	Oct 22, 2019
<a href="#">Notice of Privacy Practices</a>	Sep 27, 2019
<a href="#">Informed Consent for Psychotherapy</a>	Sep 27, 2019
<a href="#">Practice Policies</a>	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.

The screenshot shows the 'My Uploads' section. It features a large dashed box for file uploads with a document icon in the center. Below the box, it says 'Upload Files or drop files here' and lists supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. Below this, there is a table showing one uploaded file.

My Uploads	
<a href="#">Screen Shot 2019-10-10 at 11.17.18 AM.png</a>	Oct 14, 2019



**Congratulations!**

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

# Secure Messaging

with  simplepractice

Secure Messaging lets you message your clinician directly. Reschedule your session or ask a question straight from your phone.

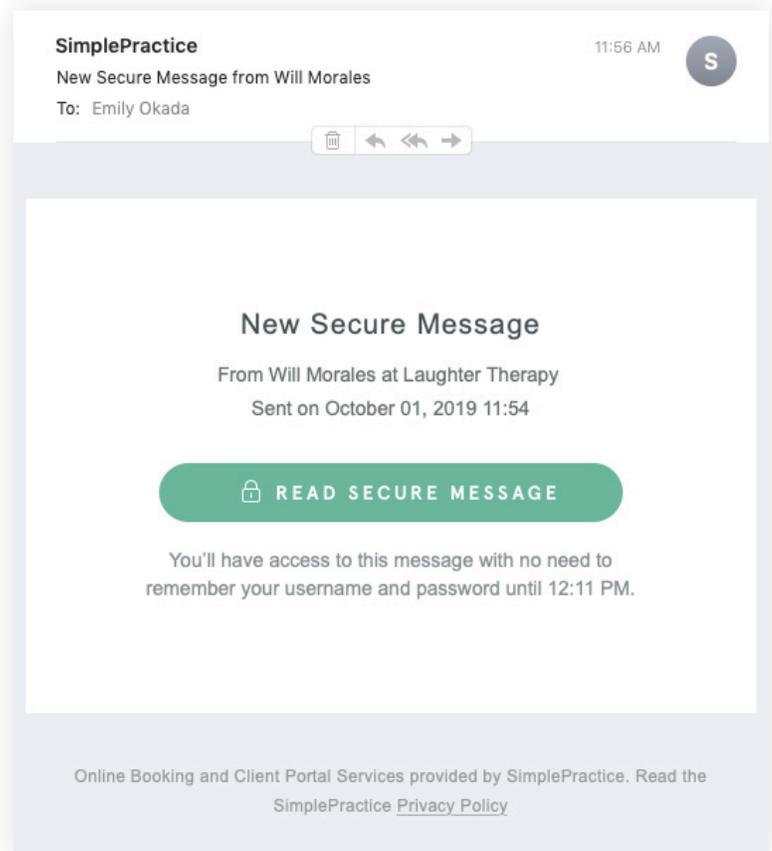
## SECTIONS:

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 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

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

The screenshot displays the Laughter Therapy Client Portal. At the top, the header includes the text "Laughter Therapy" and a "Sign Out" button with a speech bubble icon. Below the header, there are navigation tabs for "Appointments", "Documents", and "Billing & Payments". The main content area shows an "Appointment" card with the following details: "Oct 07, 2019", "12:45 PM—2:15 PM UTC", "Will Morales", and "11801 Mississippi Ave, 90025, CA 90025". There are "Add to Calendar" and "Cancel" buttons at the bottom of the card. Overlaid on the right side of the appointment card is a secure messaging window titled "Will Morales". The window shows a conversation where the user (WM) has sent three messages: "Thank you!", "I'll make sure to do that", and "See you soon.". The therapist (WM) has responded with "Hi Emily, I'm looking forward to our session on October 7 at 12:45PM. Please familiarize yourself with the Client Portal and fill out all your Demographics information before we meet." and "Great! Thanks". A "Send a message" input box is at the bottom of the window, with a tip: "Tip: to add space between lines, use Shift + Enter".

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 your message. The **orange dot** indicates a new message is waiting.

This screenshot shows the top portion of the Laughter Therapy Client Portal. The header features "Laughter Therapy" on the left and a "Sign Out" button with a speech bubble icon on the right. Below the header, there are navigation tabs for "Appointments", "Documents", and "Billing & Payments". On the far right of this navigation bar, there is a "Request Appointment" button with a calendar icon.



**Congratulations!**

You're now ready to start using Secure Messaging.

# How to Request Appointments

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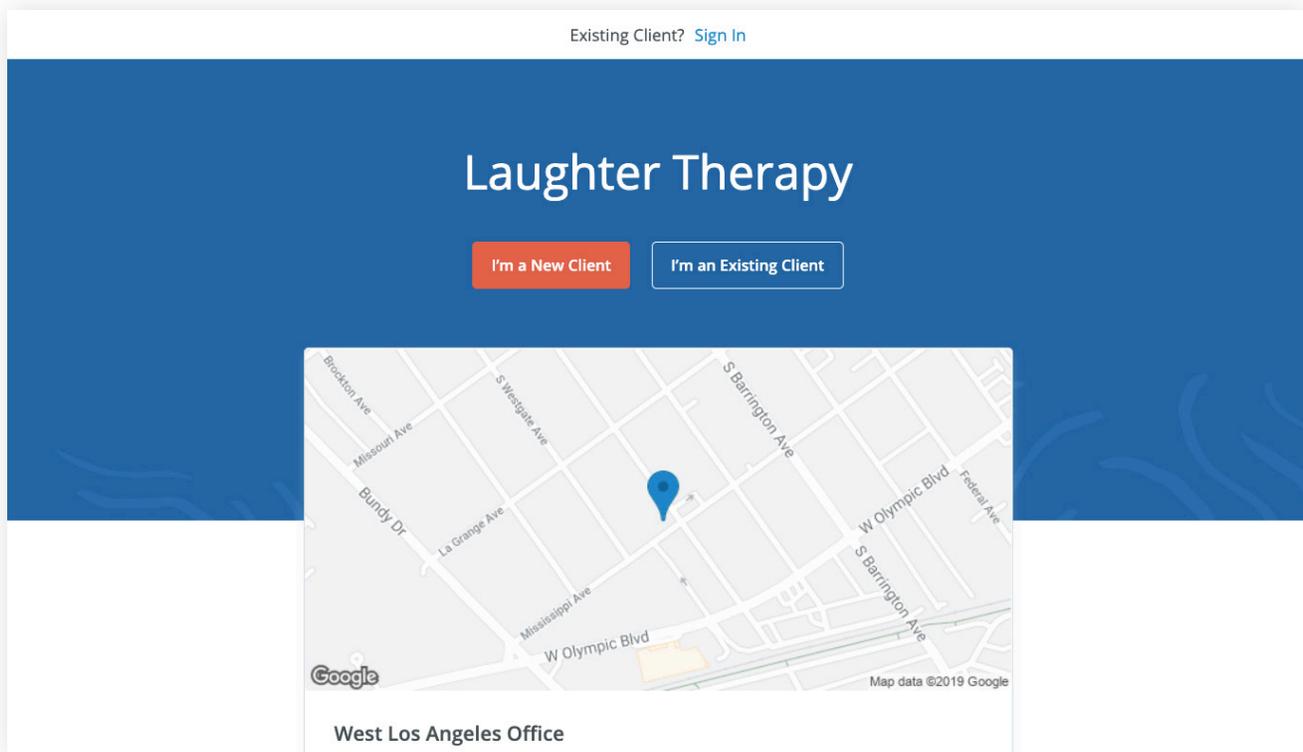
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

**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

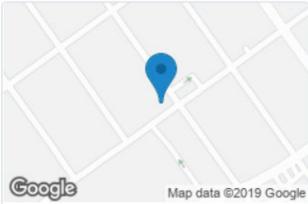
5. Choose your **office location** (there may only be one to select from, as shown below)

## Laughter Therapy

Existing client? [Sign In](#)

### Request an appointment

- ✓ Clinician  
Will Morales
- ✓ Service  
90 Minute Session  
1 hour, 30 minutes
- 3 Select Location**
- 4 Select Date & Time
- 5 Your Information



**West Los Angeles Office**  
11801 Mississippi Ave  
90025, CA 90025  
(123) 123-1212

Select

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

## Laughter Therapy

Existing client? [Sign In](#)

### Request an appointment

- ✓ Clinician  
Will Morales
- ✓ Service  
90 Minute Session  
1 hour, 30 minutes
- ✓ Location  
West Los Angeles Office  
11801 Mississippi Ave  
90025, CA 90025  
(123) 123-1212
- ✓ Date & time  
Mon, Sep 30, 2019  
10:30 AM - 12:00 PM  
PDT
- 5 Your Information

September 2019

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

Availability on Mon, Sep 30, 2019  
Viewing in PDT [Change](#)

Morning	Afternoon	Evening
10:00 AM	12:00 PM	--
10:15 AM	12:15 PM	--
10:30 AM	12:30 PM	--
10:45 AM	12:45 PM	--
11:00 AM	1:00 PM	--
11:15 AM	1:15 PM	--
More Times	More Times	

Show availability for:

- Mornings Before 12pm
- Afternoons 12pm - 4pm

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

**With**  
Will Morales

**What**  
90 Minute Session

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



**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

Sep 30, 2019  
11:15 AM—12:45 PM UTC

Will Morales

11801 Mississippi Ave  
90025, CA 90025

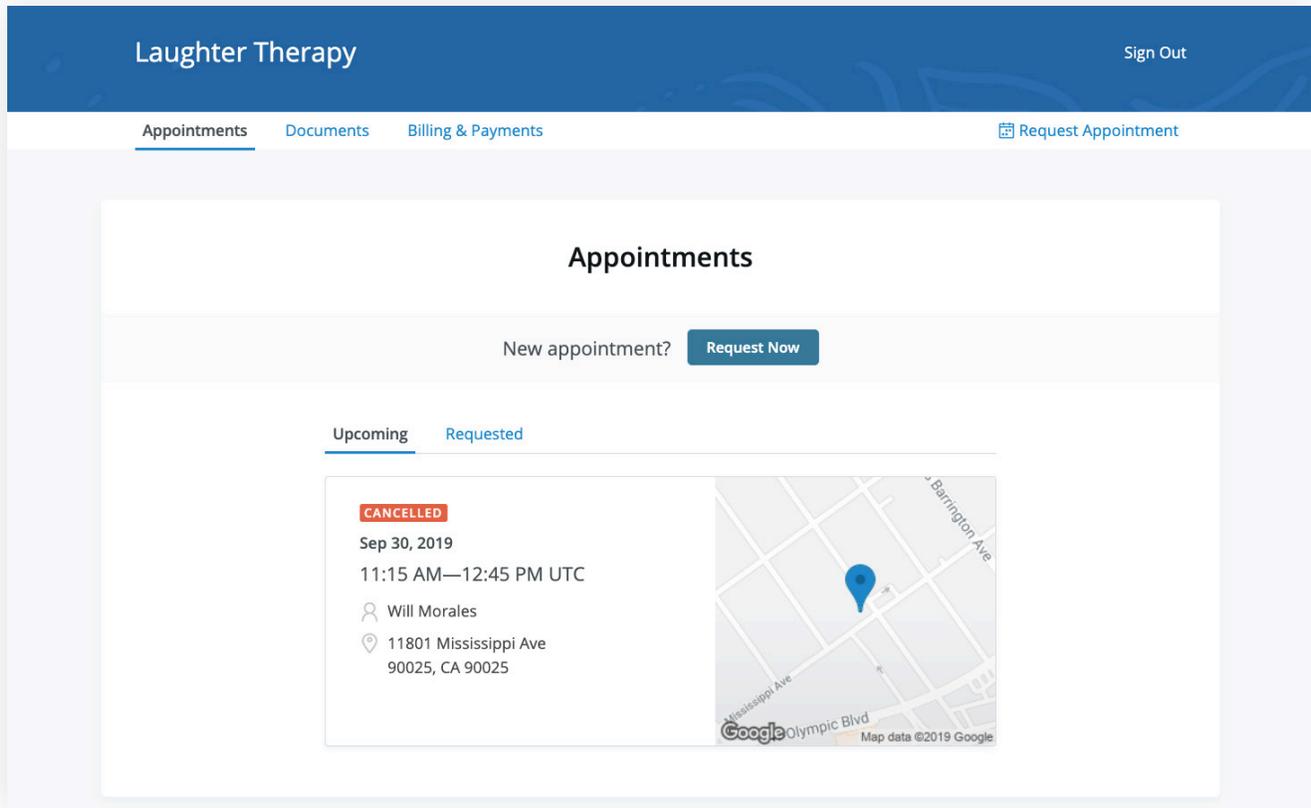
[Add to Calendar](#) [Cancel](#)



[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.



The screenshot displays the 'Appointments' page in the Laughter Therapy client portal. At the top, there is a navigation bar with 'Laughter Therapy' on the left and 'Sign Out' on the right. Below this, a secondary navigation bar includes 'Appointments' (underlined), 'Documents', 'Billing & Payments', and a 'Request Appointment' button. The main content area is titled 'Appointments' and features a 'New appointment?' prompt with a 'Request Now' button. Two tabs, 'Upcoming' and 'Requested', are visible. Under the 'Upcoming' tab, a single appointment card is shown with a red 'CANCELLED' label. The appointment details are: 'Sep 30, 2019', '11:15 AM—12:45 PM UTC', 'Will Morales' (with a person icon), and '11801 Mississippi Ave, 90025, CA 90025' (with a location pin icon). To the right of the text is a map snippet showing the intersection of Mississippi Ave and Barrington Ave, with a blue location pin. The map includes the Google logo and 'Map data ©2019 Google'.

**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

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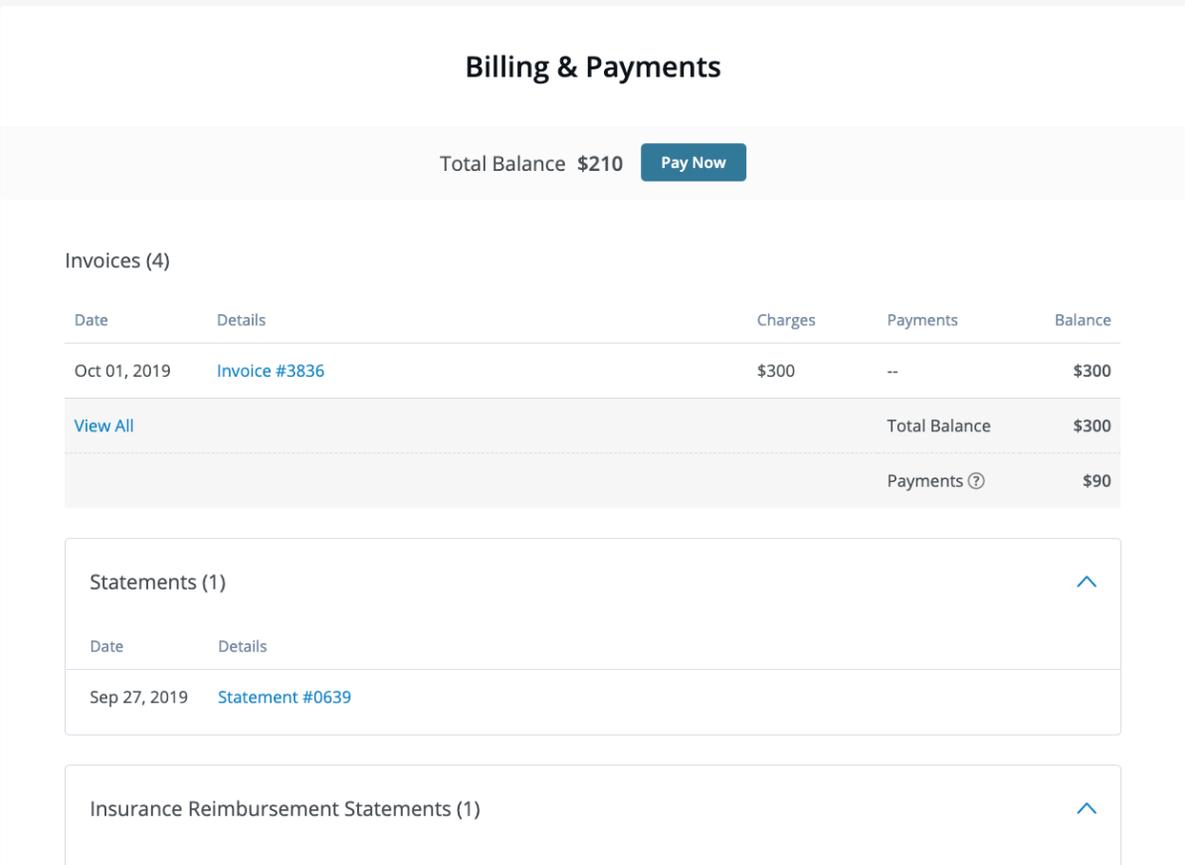
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

**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 \$210 [Pay Now](#)

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	<a href="#">Invoice #3836</a>	\$300	--	\$300
<a href="#">View All</a>			Total Balance	\$300
			Payments 	\$90

Statements (1) [^](#)

Date	Details
Sep 27, 2019	<a href="#">Statement #0639</a>

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 <span style="float: right;">^</span>				
Date Range: All Time				
Date	Type	Charges	Payments	Balance
Oct 01, 2019	<a href="#">Invoice #3836</a>	\$300	--	\$210
Oct 01, 2019	<a href="#">Invoice #3835</a> <span style="background-color: #28a745; color: white; padding: 2px;">PAID</span>	CR \$90	--	CR \$90
Oct 01, 2019	<a href="#">Invoice #3834</a> <span style="background-color: #28a745; color: white; padding: 2px;">PAID</span>	\$30	--	\$0
Oct 01, 2019	Cash payment	--	(\$30)	CR \$30
Sep 27, 2019	<a href="#">Invoice #3832</a> <span style="background-color: #28a745; color: white; padding: 2px;">PAID</span>	\$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 <span style="float: right;">^</span>																																																																																										
09/02/2019 - 10/01/2019																																																																																										
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <span>All Time</span> <span>Last 30 days</span> <span>This Month</span> <span>Last Month</span> <span>This Year</span> <span>Last Year</span> </div> <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>&lt;&lt;</span> <span>September</span> <span>October</span> <span>&gt;&gt;</span> </div> <table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> <td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> <td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> <td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td> </tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> <td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td> </tr> </table> </div> </div>					Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	1	2	3	4	5	6	7	29	30	1	2	3	4	5	8	9	10	11	12	13	14	6	7	8	9	10	11	12	15	16	17	18	19	20	21	13	14	15	16	17	18	19	22	23	24	25	26	27	28	20	21	22	23	24	25	26	29	30	1	2	3	4	5	27	28	29	30	31	1	2	Payments	Balance
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat																																																																													
1	2	3	4	5	6	7	29	30	1	2	3	4	5																																																																													
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15	16	17	18	19	20	21	13	14	15	16	17	18	19																																																																													
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Sep 27, 2019	Cash payment	--	(\$150)	CR \$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** Download Print  
Emily Okada

From **Laughter Therapy**  
11801 Mississippi Ave  
90025, CA 90025

**Statement for Insurance Reimbursement**

To **Emily Okada**

## 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

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

### Billing & Payments

Total Balance \$210 Pay Now ←

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	<a href="#">Invoice #3836</a>	\$300	--	\$300
<a href="#">View All</a>			Total Balance	\$300
			Payments ⓘ	\$90

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

Invoice #3836  
Emily Okada

Download Print Pay Now

From Laughter Therapy  
11801 Mississippi Ave  
90025, CA 90025

To Emily Okada  
510 Arizona Ave  
Santa Monica, CA 90401

Client Emily Okada  
Provider Will Morales  
Tax ID: 123-45-678

Invoice #3836  
Issue Date 10/01/2019

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.

Billing & Payments

Make a payment

Cardholder's name Card number  
Emily Okada Card Number

Expiration Security code Billing zipcode  
MM / YY CVC

Save Card

Cancel Pay \$360



**Congratulations!**

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