



Complete Guide to the Client Portal



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:

1. How do I log in?
2. Troubleshooting
3. Online booking
4. Documents and forms

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.

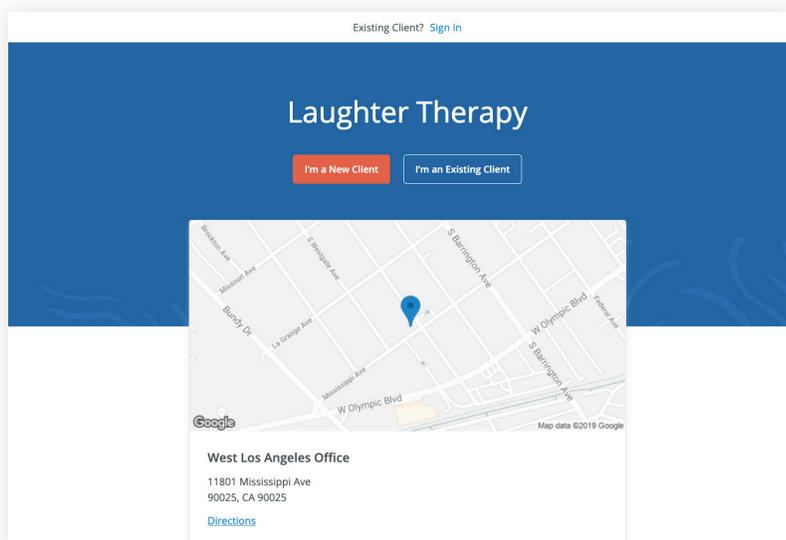
Before we meet, I would like you to review my practice documents and provide some information about yourself. This will help us get started.

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.

Please create a password for your client portal account

* Password

* Password confirmation

Update

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.

PDR Clinic Sign Out

Hi Jane, which client would you like to manage?



Jane Smith



Becky Smith

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

Sign in to the client portal

Email Address

Password

Log in

Forgot your password?



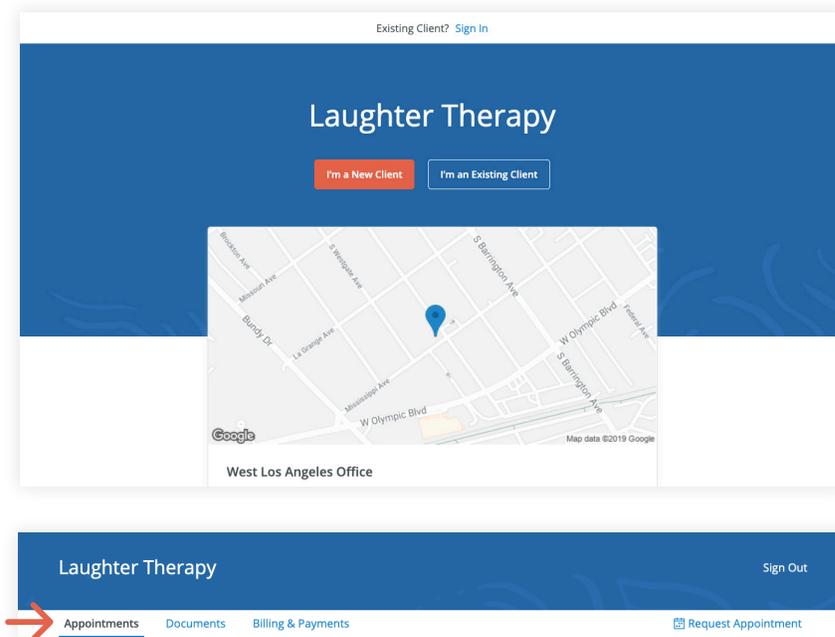
Are you a new client? [Request an appointment](#)

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.

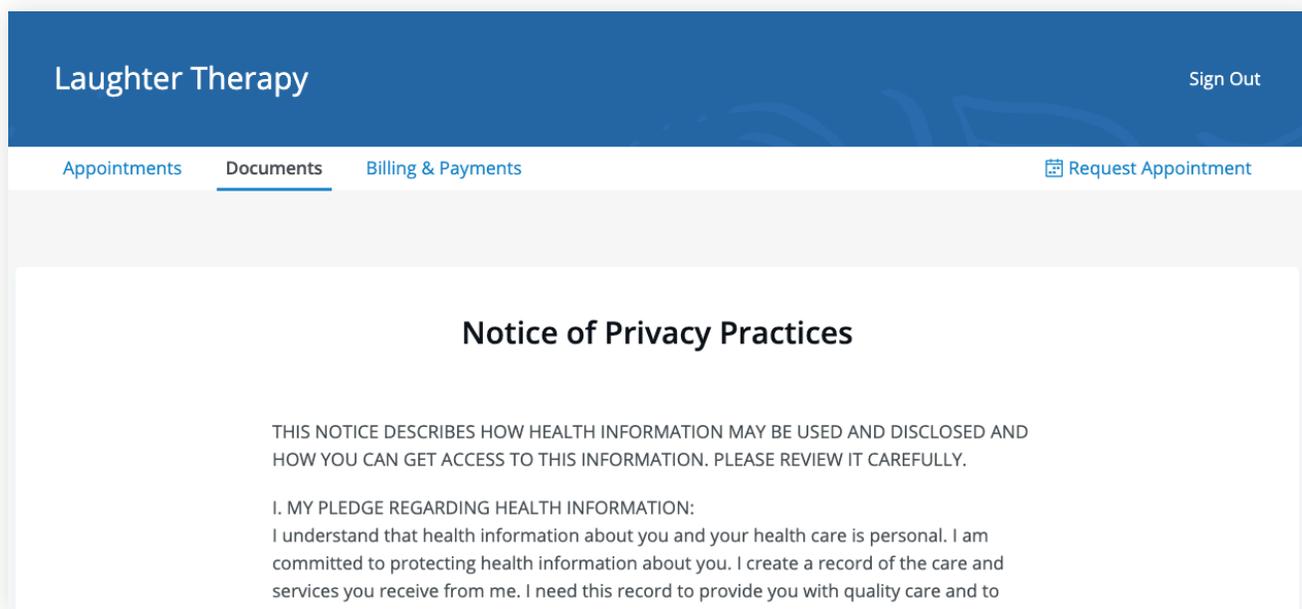
The following steps will show you how to request appointments.

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.

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

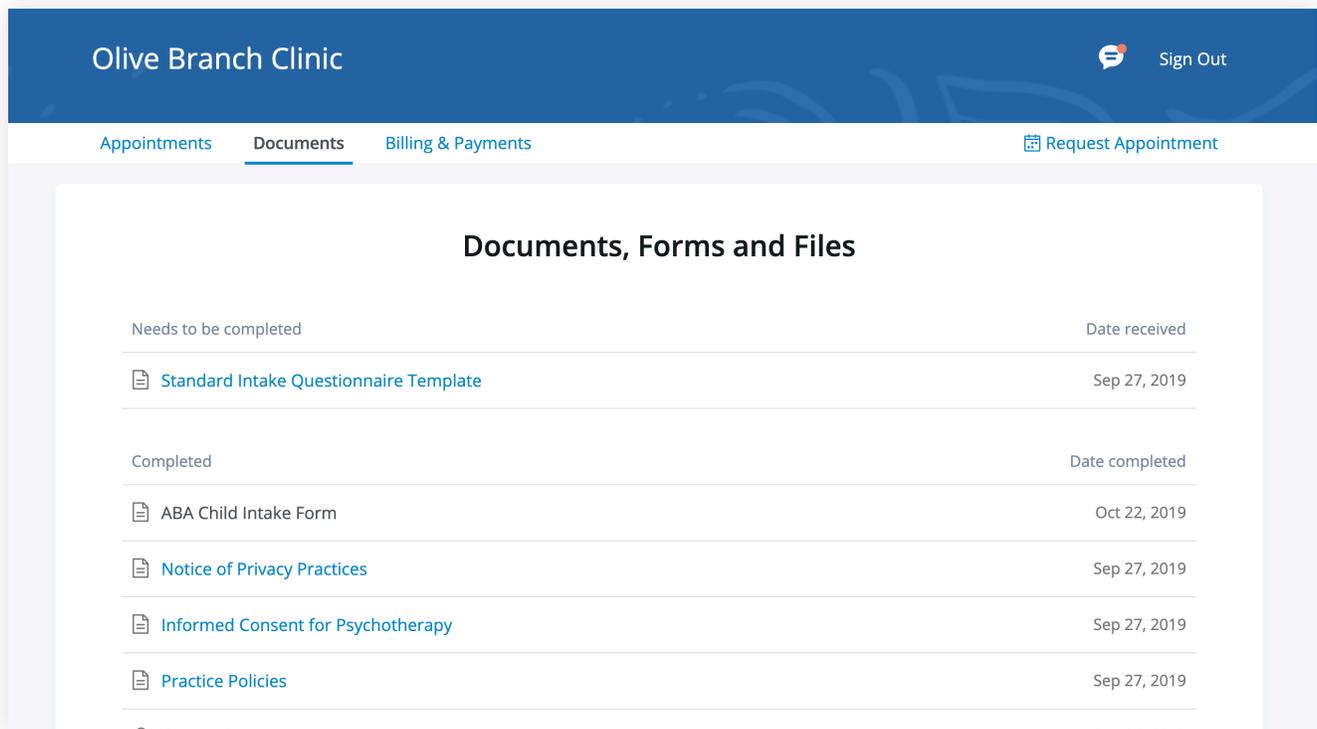
Send me email appointment reminders

Phone number

(949) 306-8945

Work 

To view your completed documents at any time, navigate to the **Documents** tab.

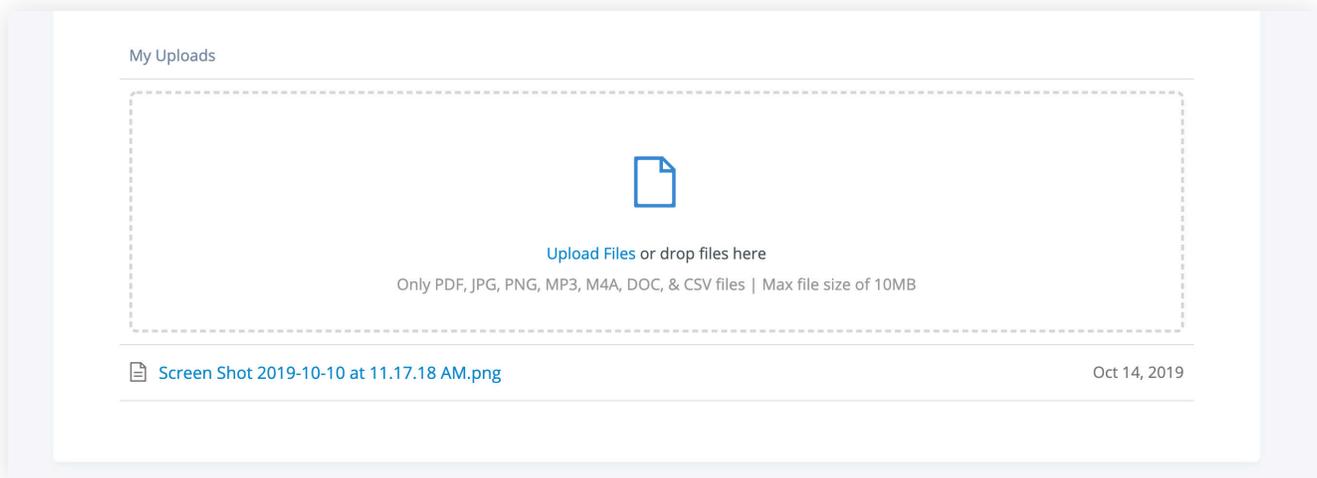


The screenshot shows the Olive Branch Clinic client portal interface. At the top, there is a blue header with the clinic name and a 'Sign Out' button. Below the header is a navigation bar with tabs for 'Appointments', 'Documents' (which is selected), and 'Billing & Payments'. A 'Request Appointment' 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 listing documents with their respective dates.

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.



The screenshot shows the 'My Uploads' section of the client portal. It features a large dashed box for file uploads with a document icon and the text 'Upload Files or drop files here'. Below this, it specifies supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. At the bottom, there is a list of uploaded files, including 'Screen Shot 2019-10-10 at 11.17.18 AM.png' with a date of 'Oct 14, 2019'.



Congratulations!

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

Secure Messaging

with  simplepractice

Secure Messaging lets you send and receive messages directly with your clinician. Reschedule your session or ask a question from your phone.

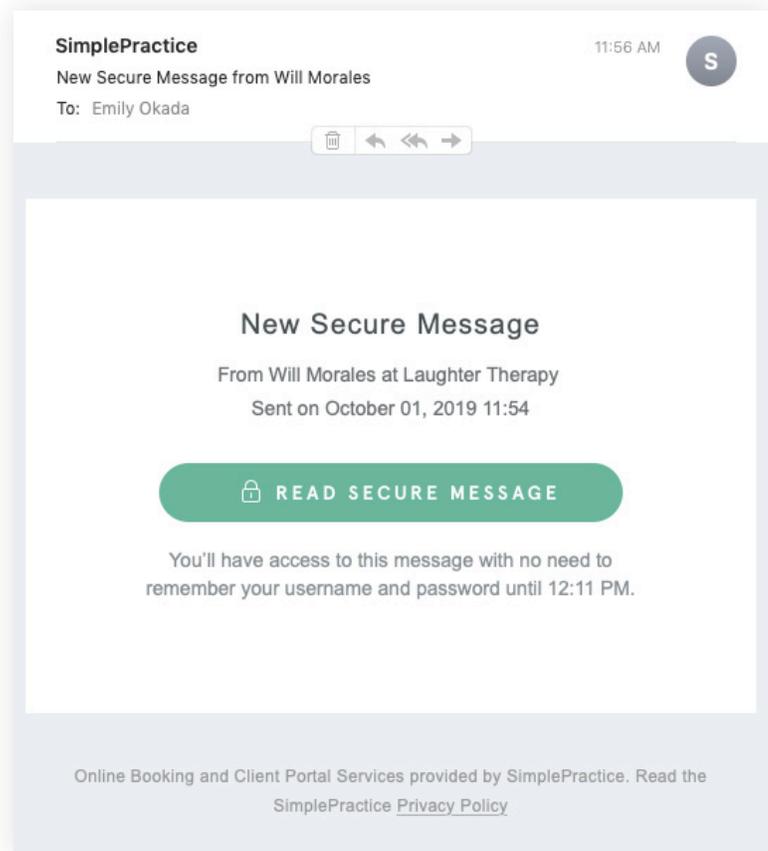
SECTIONS:

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.

The screenshot shows the Laughter Therapy client portal. At the top, there's a blue header with the text "Laughter Therapy" and a "Sign Out" button. Below the header, there are navigation tabs for "Appointments", "Documents", and "Billing & Payments". The main content area is titled "Appointment" and features a "New appointment?" button. Underneath, there are tabs for "Upcoming" and "Requested". An appointment card is displayed for "Oct 07, 2019" from "12:45 PM—2:15 PM UTC" with "Will Morales" as the provider and the address "11801 Mississippi Ave, 90025, CA 90025". There are "Add to Calendar" and "Cancel" buttons. A secure messaging window is overlaid on the right, titled "Will Morales". It shows a message from WM: "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." The user has replied with "Thank you!", "I'll make sure to do that", and "See you soon." (marked as "Delivered"). WM has replied with "Great! Thanks". At the bottom of the messaging window is a "Send a message" input field and 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 on 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 blue header contains "Laughter Therapy" on the left and a "Sign Out" button on the right, which is preceded by a red arrow icon pointing to a secure message icon. Below the header, the navigation tabs "Appointments", "Documents", and "Billing & Payments" are visible. 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.