simplepractice

Complete Guide to the Client Portal

The Client Portal

with **✳simple**practice

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.

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

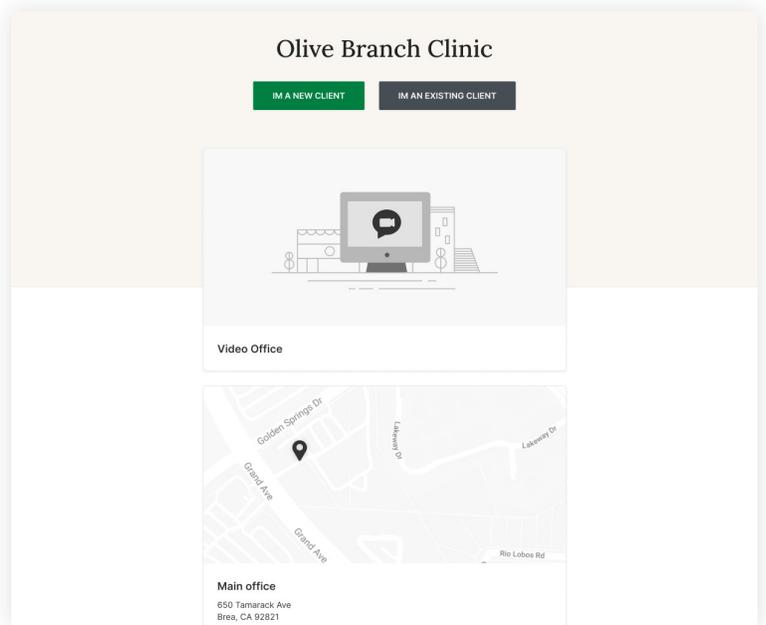## Olive Branch Clinic

IM A NEW CLIENT   IM AN EXISTING CLIENT

To log back in:

1. Go to your clinician's **Client Portal website**.

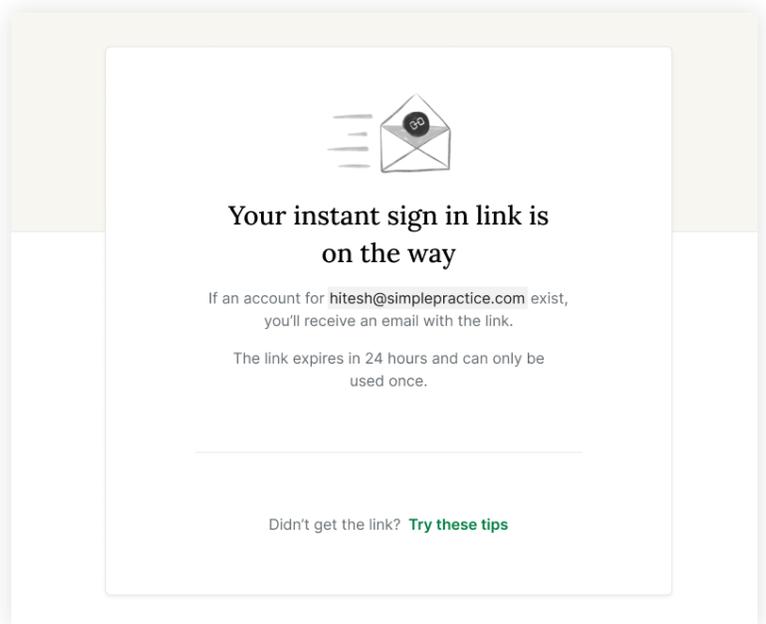2. Click the **I'm an Existing Client** button.

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.**
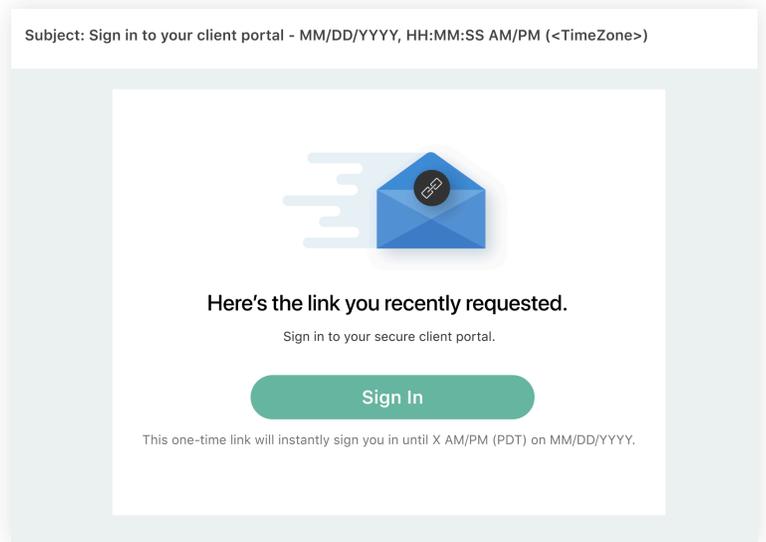

4. Check your inbox to find the sign-in email. Keep in mind that the link in the email is valid for 24 hours and can **only** be used to sign in once.

> **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.

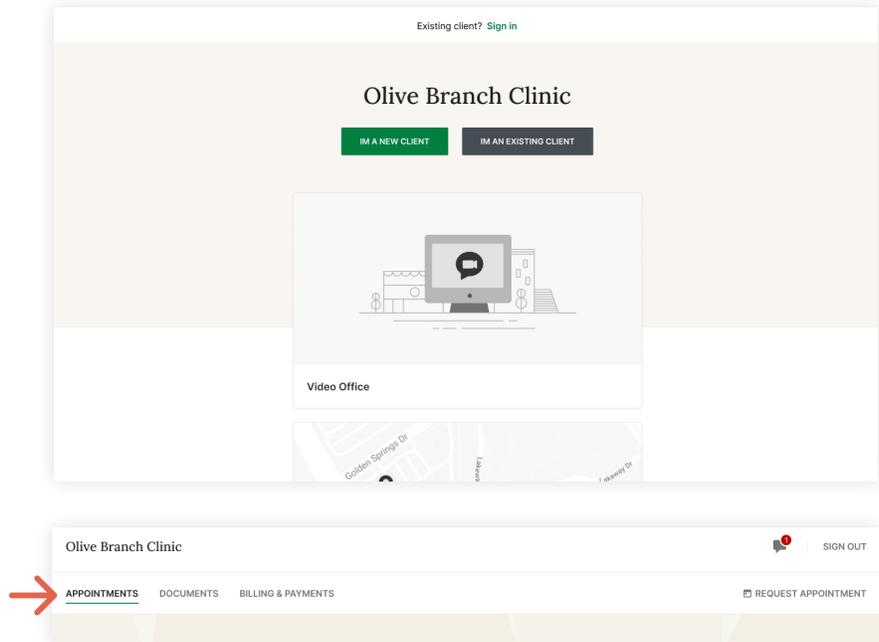## TROUBLESHOOTING SIGN-IN ISSUES

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 r**equest 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.

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

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.
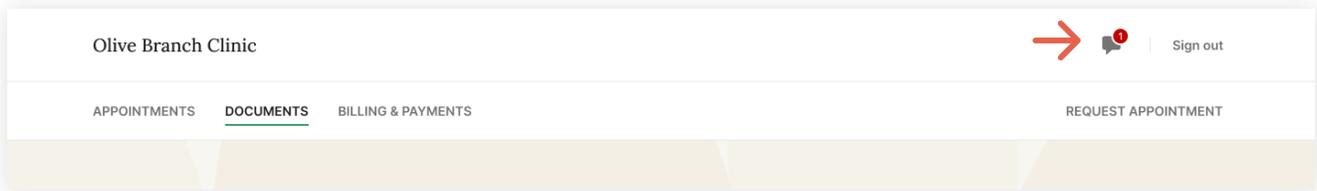
Sign In

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.

Olive Branch Clinic

APPOINTMENTS   DOCUMENTS   BILLING & PAYMENTS   REQUEST APPOINTMENT

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

Olive Branch Clinic

APPOINTMENTS   DOCUMENTS   **BILLING & PAYMENTS**

Billing & Payments

Dr. Bryan Sun

Today 5:17 PM
Secure Messaging was enabled at 3:41 PM

Hello

Can you please help me pay a bill?

Delivered

EJ Hello

Total Balance **$300**   **PAY BILL**

Send a message

Tip: To add space between lines, use Shift + Enter

Invoices (7)

DATE	INVOICE		CHARGES	PAYMENTS	
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

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.

Isabella Jones

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.

Documents

Needs to be completed	DATE RECEIVED
📄 Questionairre	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.

How to Request Appointments
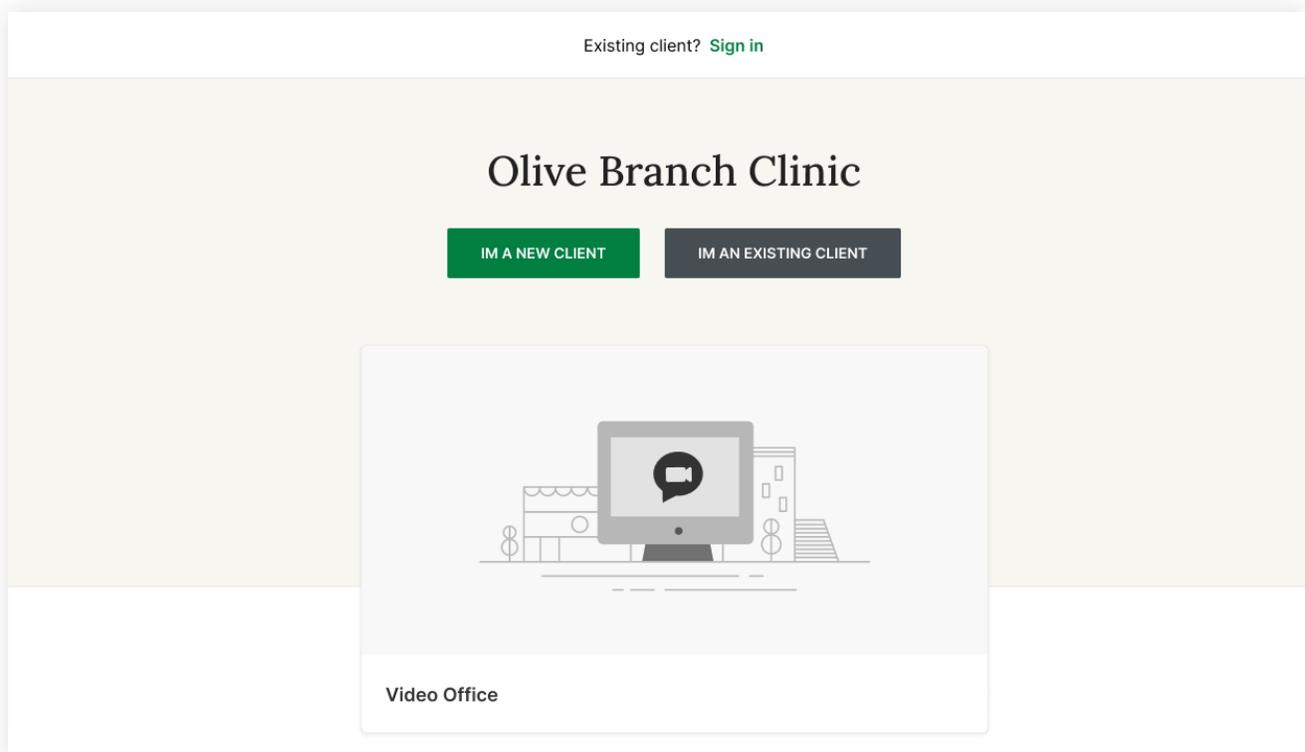
with **simple**practice

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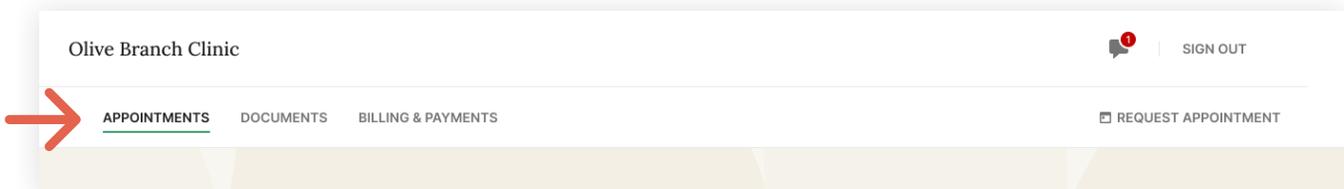
SECTIONS:

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.

Existing client? **Sign in**

Olive Branch Clinic

IM A NEW CLIENT   IM AN EXISTING CLIENT

Video Office

2. Navigate to the **Appointments tab** (This may already be selected by default).

Olive Branch Clinic   SIGN OUT

APPOINTMENTS   DOCUMENTS   BILLING & PAYMENTS   REQUEST APPOINTMENT

3. Select your **service.**

‹ **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**.

‹ **Appointments**

Request appointment

✓ Service
  Psychotherapy,
  60 min 1 hour
2 Selct 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.

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‹ 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

‹ 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.

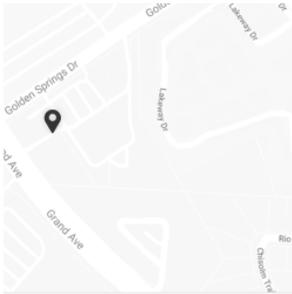You can click to view a map of the office location, or add the session to your calendar.

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.

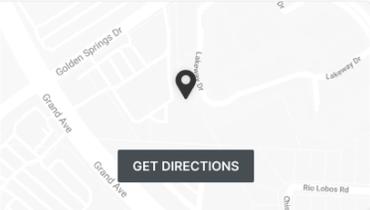## VIEWING AND CANCELLING REQUESTS

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.

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 **$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.

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

✕ **Statement for Insurance Reimbursement #0730**
Emily Okada   [Download] [Print]

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.

Olive Branch Clinic   💬 1   SIGN OUT

APPOINTMENTS   DOCUMENTS   BILLING & 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

DOWNLOAD   PRINT   PAY NOW

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

Invoice

To	Jamie CW Appleseed	Invoice Issue Date	#1229 10/12/2021
Client	Jamie CW Appleseed	Provider	Laura T SSN: 222-22-2222 NPI: #67888888
	claire.w+jamiecw@simplepractice.com		(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

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   ✕

Cardholder's name   **Card number**

Jamie C. Appleseed   Card Number

Expiration   **Security code**   **Billing zipcode**

MM / YY   CVC   Zipcode

☐ Save Card

CANCEL   PAY $200

s (0)

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