



# 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?

Before logging into the Client Portal for the first time, you'll receive a welcome email from your clinician. By clicking the link, you'll automatically be 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.

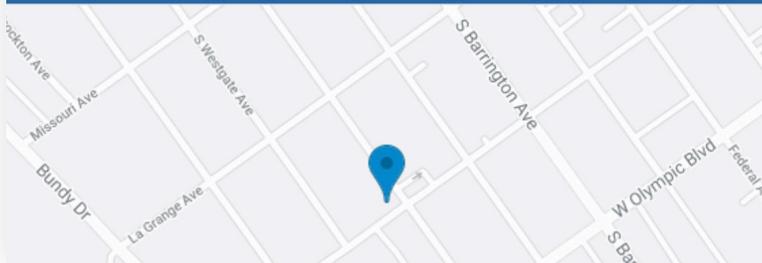
Thank you!

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

## Olive Branch Clinic

I'm a New Client

I'm an Existing Client

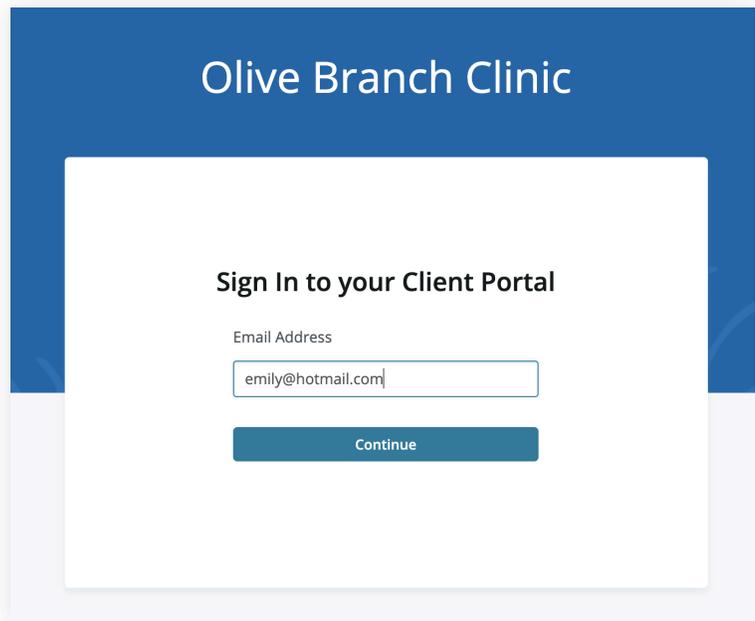


To log back in:

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 get into your Client Portal.



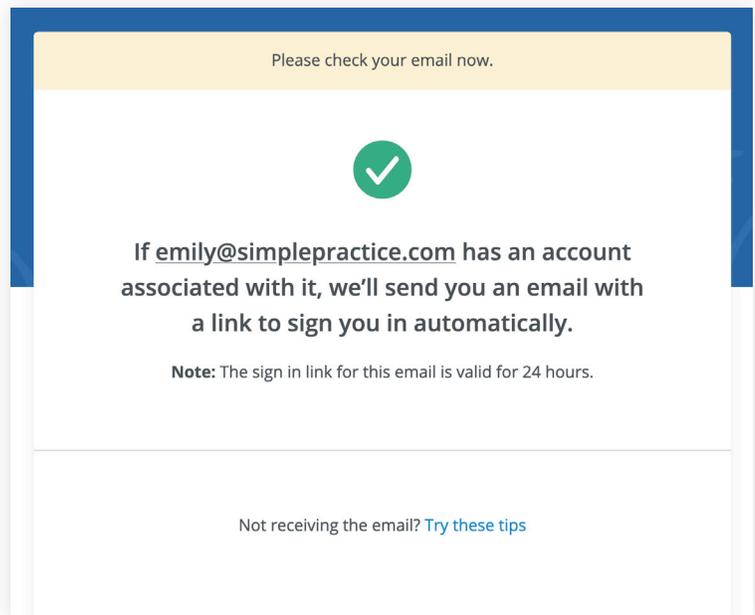
Olive Branch Clinic

### 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.

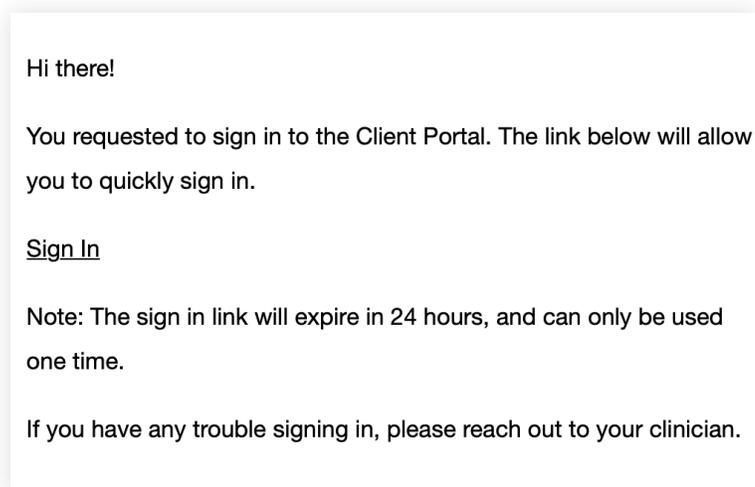


If [emily@simplepractice.com](mailto:emily@simplepractice.com) has an account associated with it, we'll send you an email with a link to sign you in automatically.

**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.

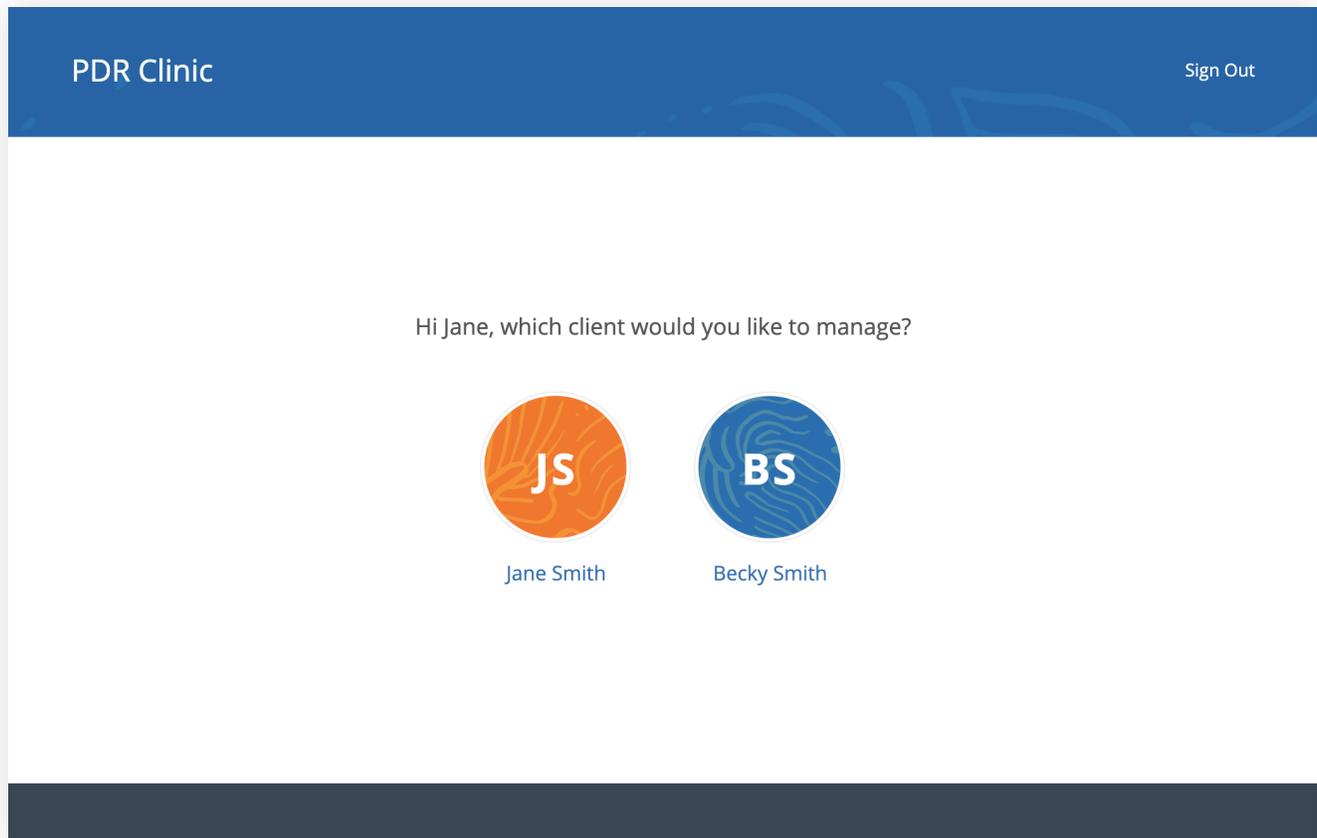
[Sign In](#)

**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 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

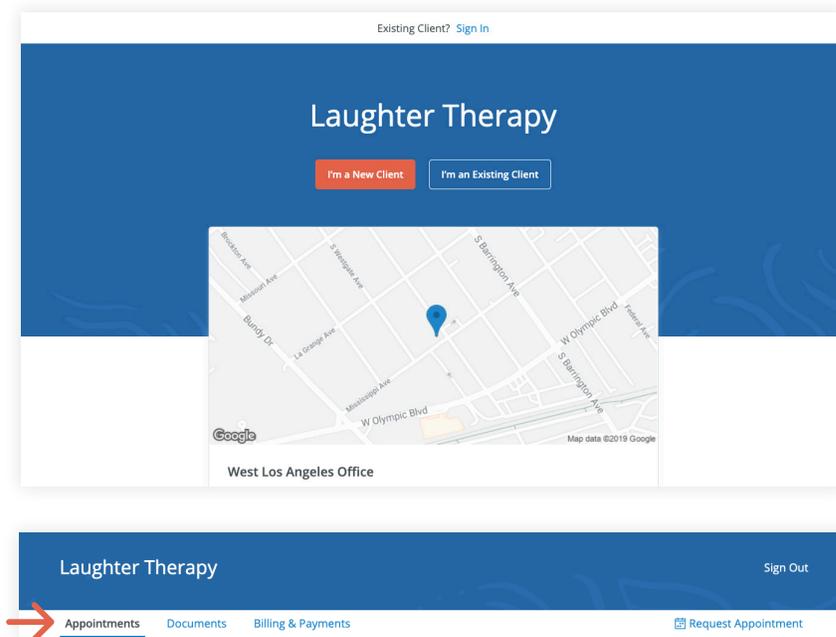
1. Check your **spam folder** and any other folders in your inbox for an email from the address `no-reply@simplepractice.com`. It also helps to add this address to your address book to make delivery easier.
2. Be mindful of any **auto-fillers** enabled in your browser that might be entering information for you. If the auto-filler replaces the information you type, this will cause it to appear as inaccurate.
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 exact.
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, 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.

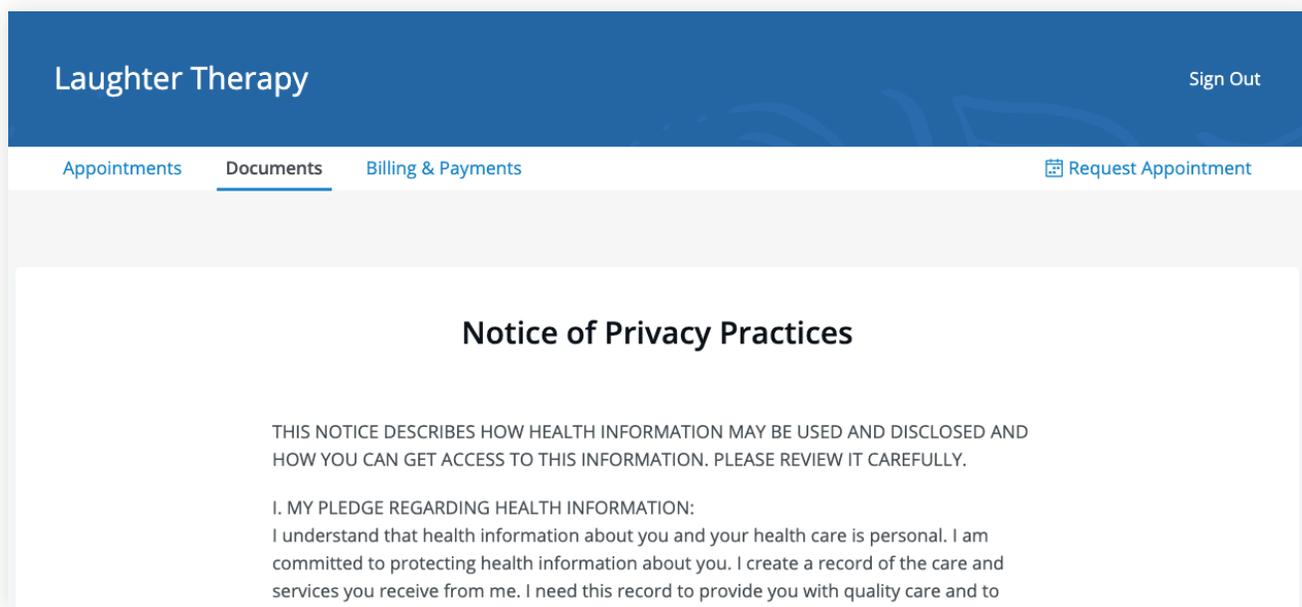
The following steps will show you how to request appointments.

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.

#### 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

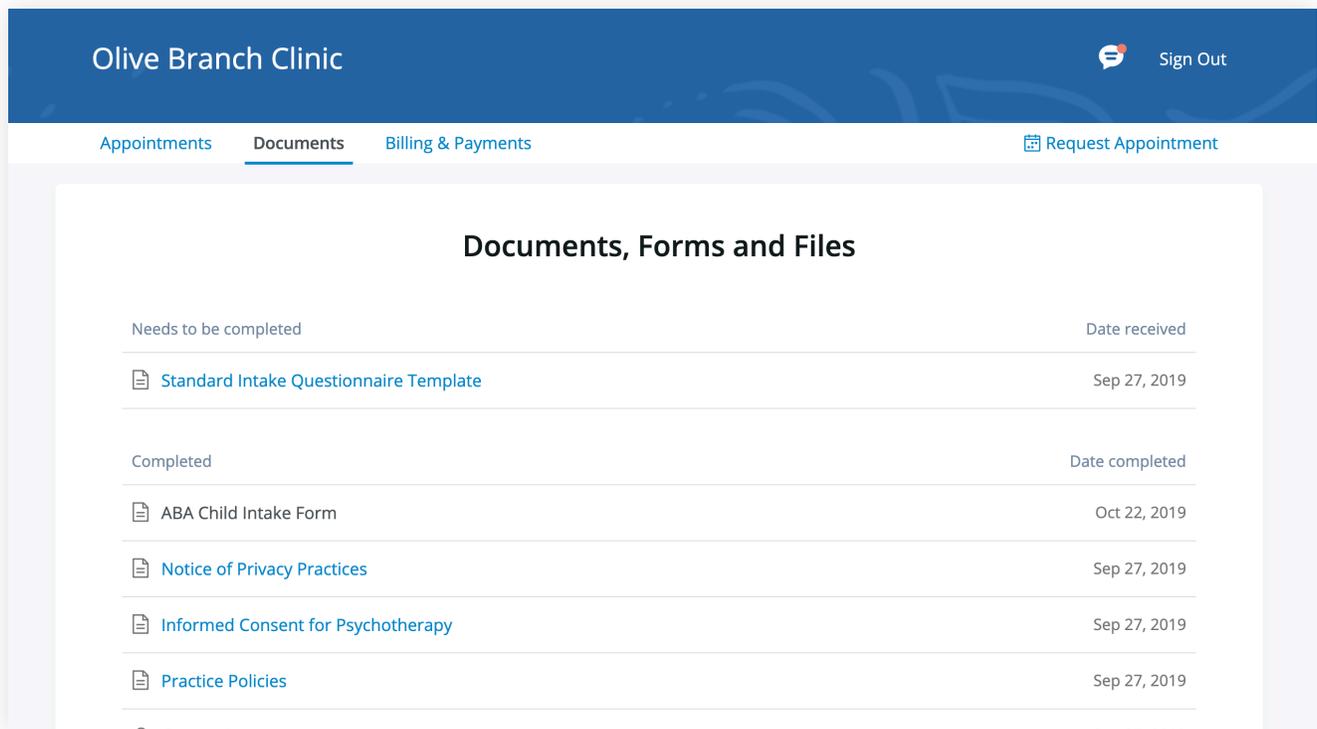
Send me email appointment reminders

Phone number

(949) 306-8945

Work 

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



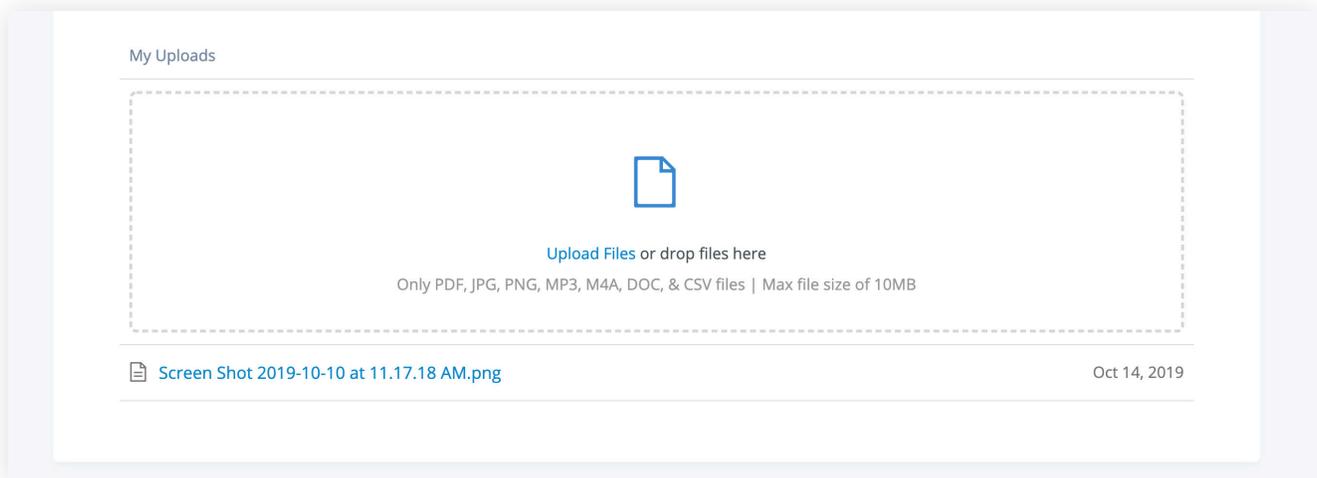
The screenshot shows the Olive Branch Clinic client portal. The top navigation bar includes the clinic name, a chat icon, and a 'Sign Out' button. Below the navigation bar are tabs for 'Appointments', 'Documents' (which is selected), and 'Billing & Payments'. A 'Request Appointment' button is also visible. 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
<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 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.

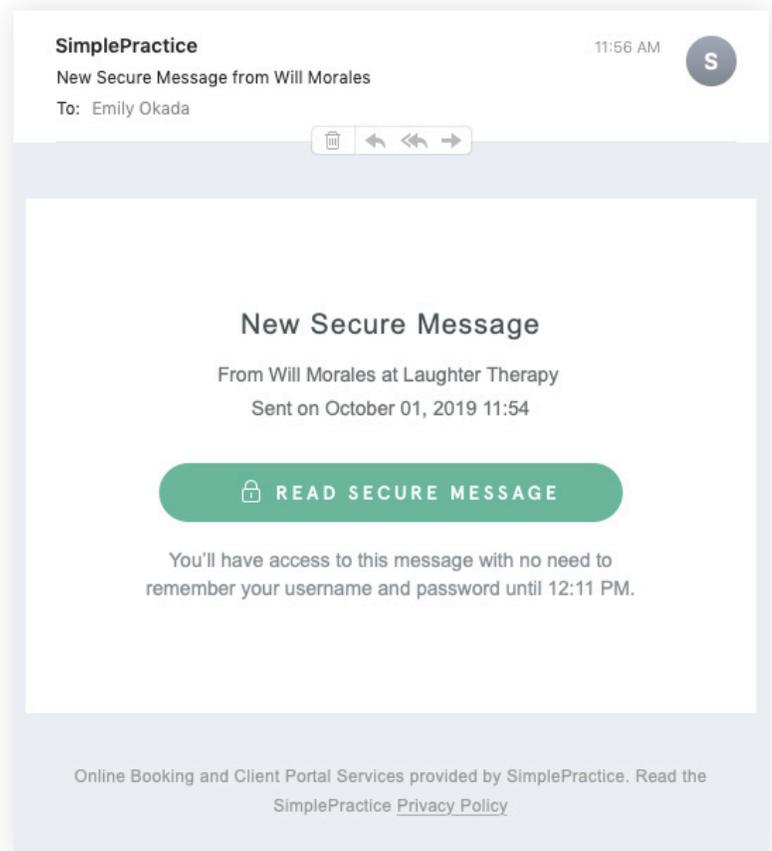
## SECTIONS:

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. The top navigation bar includes "Laughter Therapy" and a "Sign Out" button. Below the navigation, there are tabs for "Appointments", "Documents", and "Billing & Payments". The main content area displays an appointment for "Will Morales" on "Oct 07, 2019" from "12:45 PM—2:15 PM UTC" at "11801 Mississippi Ave, 90025, CA 90025". A "Secure Message" icon is visible in the top right corner of the portal. A modal window is open, showing a message from "Will Morales" (WM) to "Emily": "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." Emily has replied with three messages: "Thank you!", "I'll make sure to do that", and "See you soon." The modal also shows 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 Laughter Therapy client portal with the "Secure Message" icon highlighted in orange. The navigation bar includes "Laughter Therapy" and "Sign Out". The main content area has tabs for "Appointments", "Documents", and "Billing & Payments", along with a "Request Appointment" button.



**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.

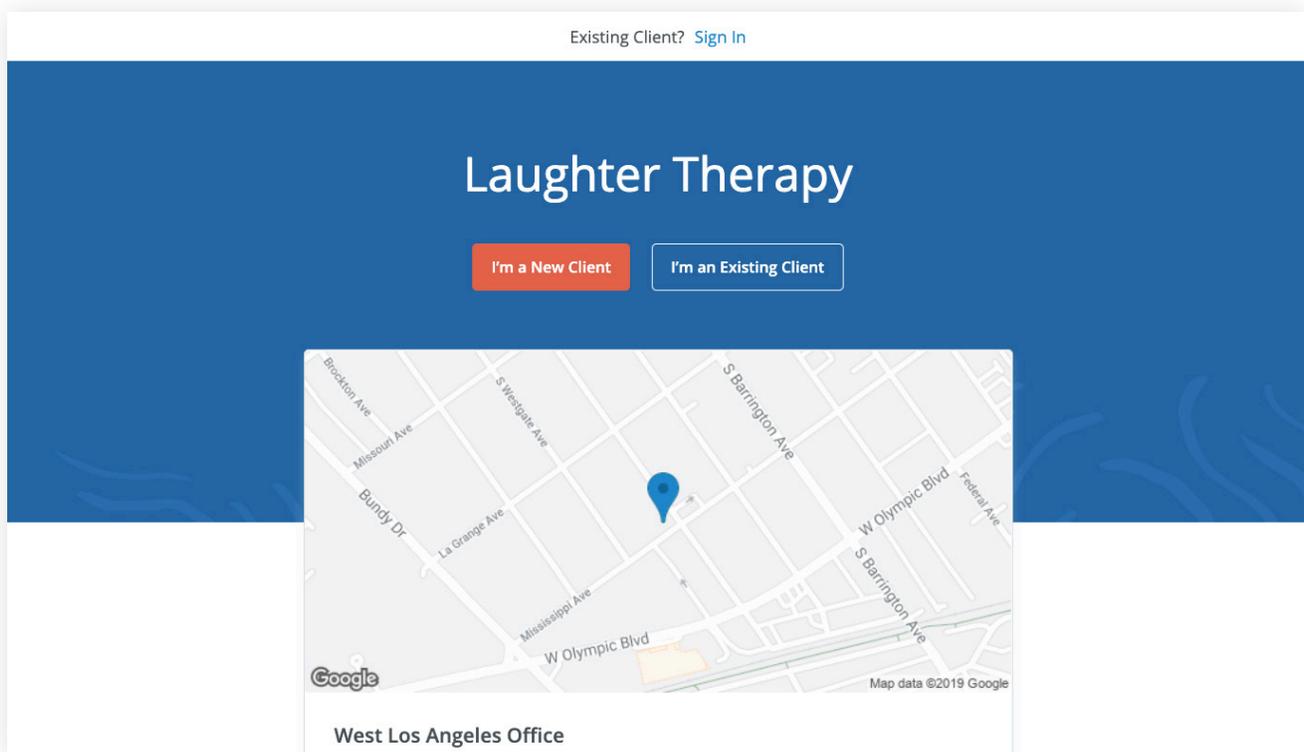
**SECTIONS:**

1. Request a session
2. Cancelling requests

## REQUEST A SESSION

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).



3. Select your **clinician** (if there are multiples).

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**. What type of appointments do you see your clinician for?

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

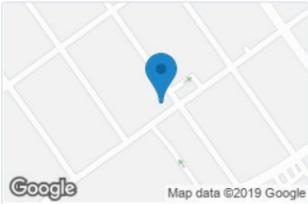
5. Choose your **office location** (there may only be one to select from, as shown below)

## 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 on 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).

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](#)

UpcomingRequested

Sep 30, 2019  
11:15 AM—12:45 PM UTC

Will Morales

11801 Mississippi Ave  
90025, CA 90025

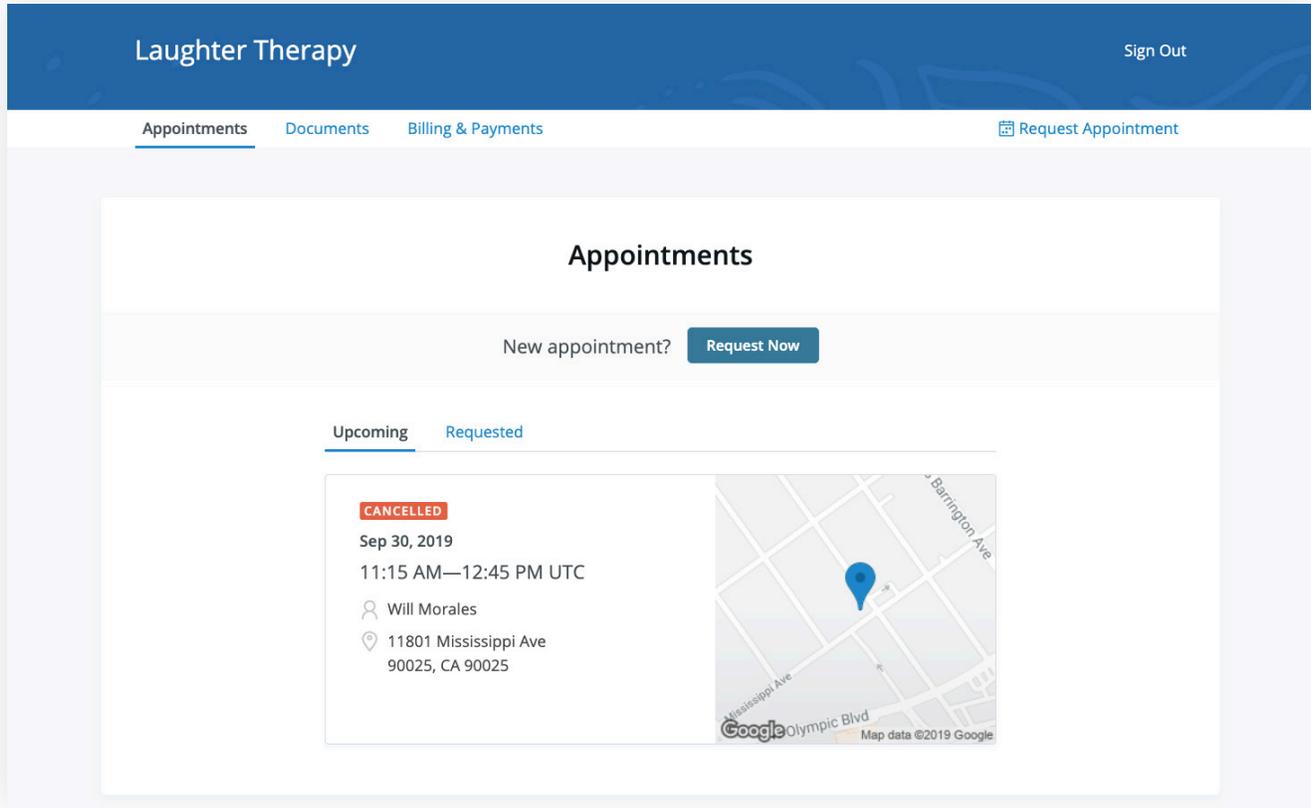
[Add to Calendar](#) [Cancel](#)



[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 'Laughter Therapy' client portal interface. At the top, there is a navigation bar with 'Laughter Therapy' on the left and 'Sign Out' on the right. Below this is a secondary navigation bar with 'Appointments', 'Documents', and 'Billing & Payments' on the left, and a 'Request Appointment' button on the right. The main content area is titled 'Appointments' and features a 'New appointment?' prompt with a 'Request Now' button. Underneath, there are two tabs: 'Upcoming' (which is active) and 'Requested'. A single appointment card is shown under the 'Upcoming' tab, marked as 'CANCELLED' in a red box. 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 small 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

with  simplepractice

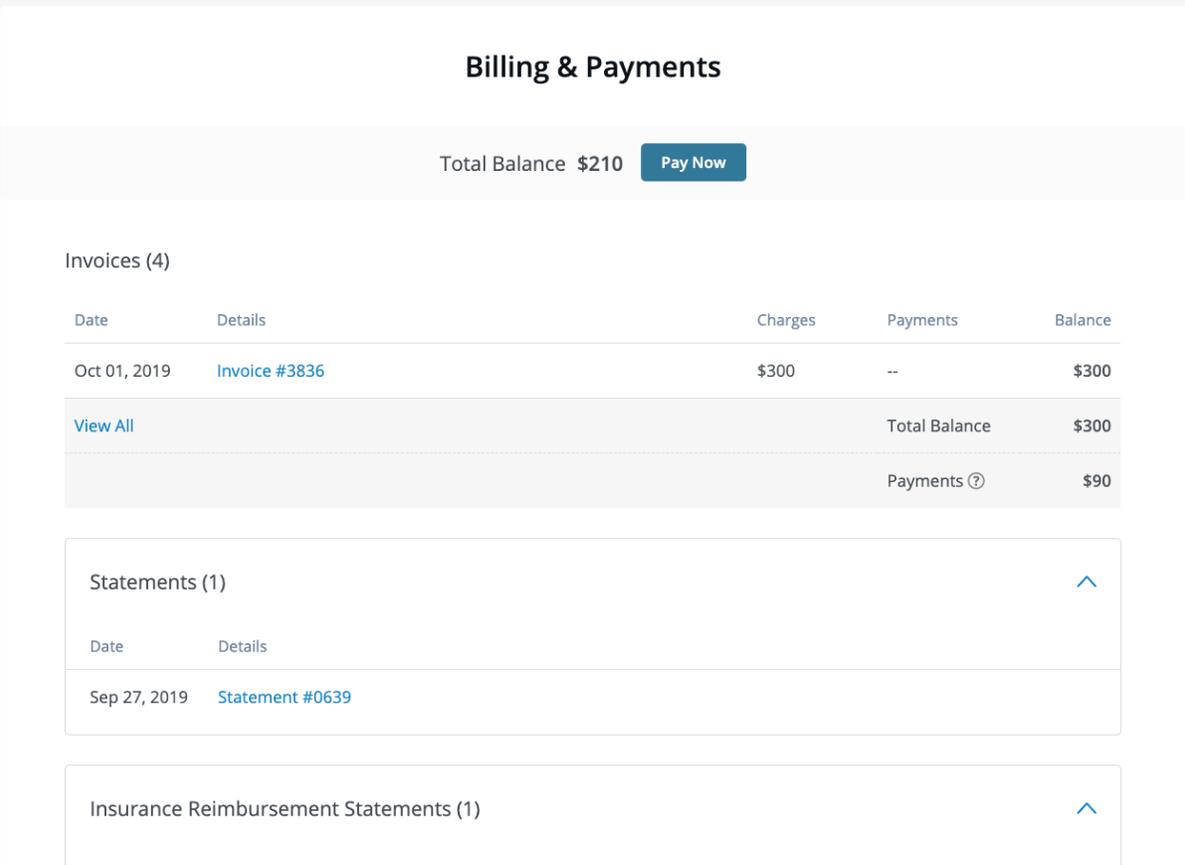
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

**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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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.

The screenshot shows an invoice interface. At the top, there is a header with a close button (X), the invoice title "Invoice #3836", and the name "Emily Okada". To the right of the header are three buttons: "Download", "Print", and "Pay Now". A red arrow points to the "Pay Now" button. Below the header, the invoice details are displayed. On the left, it says "From Laughter Therapy, 11801 Mississippi Ave, 90025, CA 90025". On the right, there is a blue rectangular placeholder. In the center, the word "Invoice" is written. Below that, it says "To Emily Okada, 510 Arizona Ave, Santa Monica, CA 90401". To the right of this, it says "Invoice #3836" and "Issue Date 10/01/2019". At the bottom, it says "Client Emily Okada" and "Provider Will Morales, Tax ID: 123-45-678, NPI: #123234444".

No matter which pay button you choose, the next steps are the same:

1. Enter the cardholder's name, card info, and billing zipcode.
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.

The screenshot shows a "Billing & Payments" modal window. The modal has a title "Billing & Payments" and a close button (X). Inside the modal, there is a "Make a payment" form. The form has a title "Make a payment" and a close button (X). The form contains the following fields: "Cardholder's name" (text input with "Emily Okada"), "Card number" (text input with "Card Number"), "Expiration" (text input with "MM / YY"), "Security code" (text input with "CVC"), and "Billing zipcode" (text input). There is a "Save Card" checkbox which is checked. At the bottom of the form, there are two buttons: "Cancel" and "Pay \$360".



**Congratulations!**

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