



# 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.

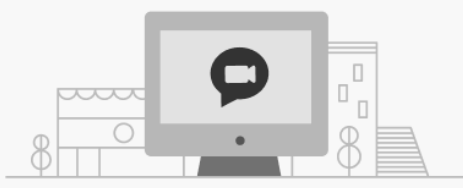
Thank you!

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

## Olive Branch Clinic

IM A NEW CLIENT

IM AN EXISTING CLIENT

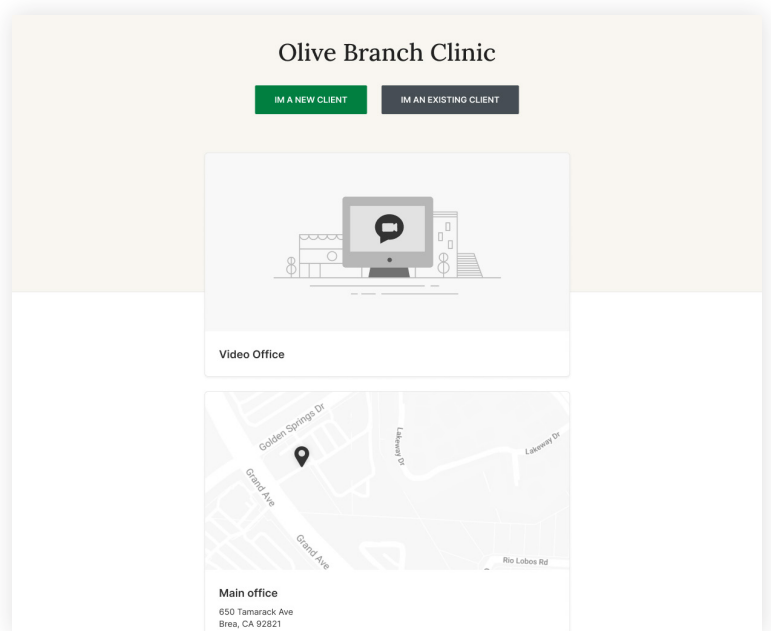


To log back in:

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

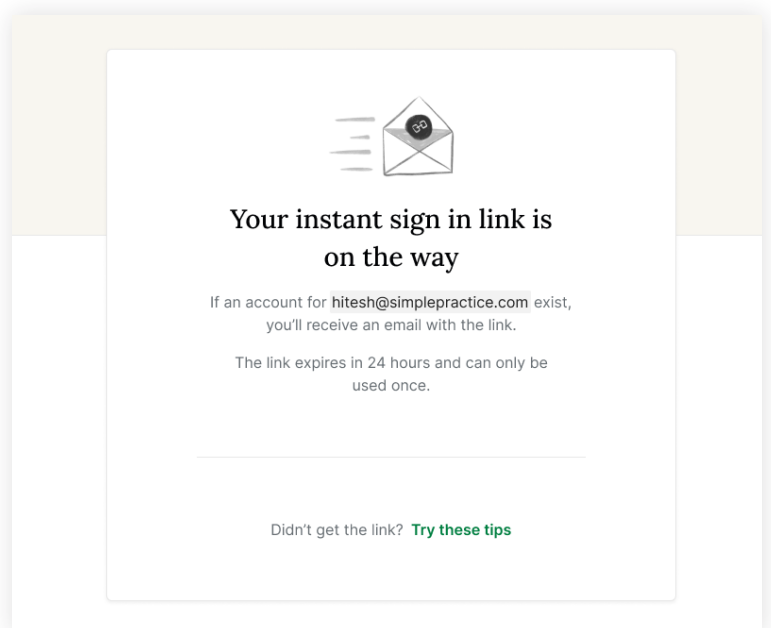
**Tip:** Bookmark this page so you can log back in easily in the future.

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



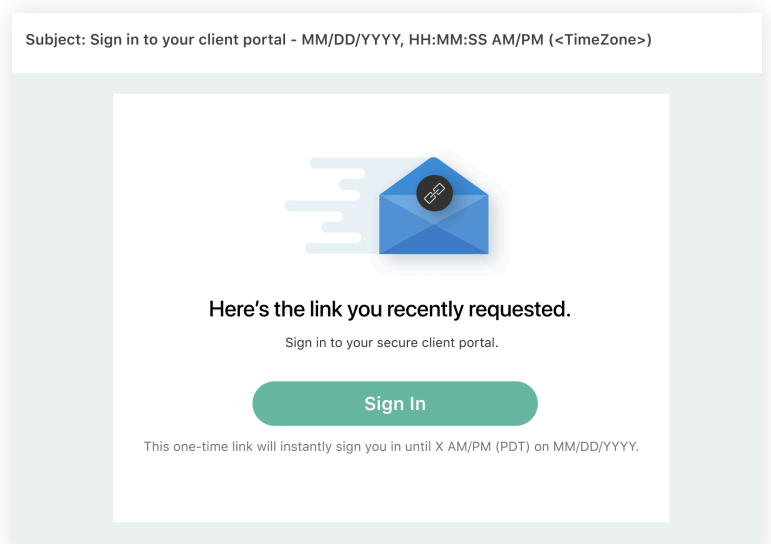
4. Check your inbox to find the sign-in email. Keep in mind that the link in the email is valid for 24 hours and can **only** be used to sign in once.

**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?



## TROUBLESHOOTING SIGN-IN ISSUES

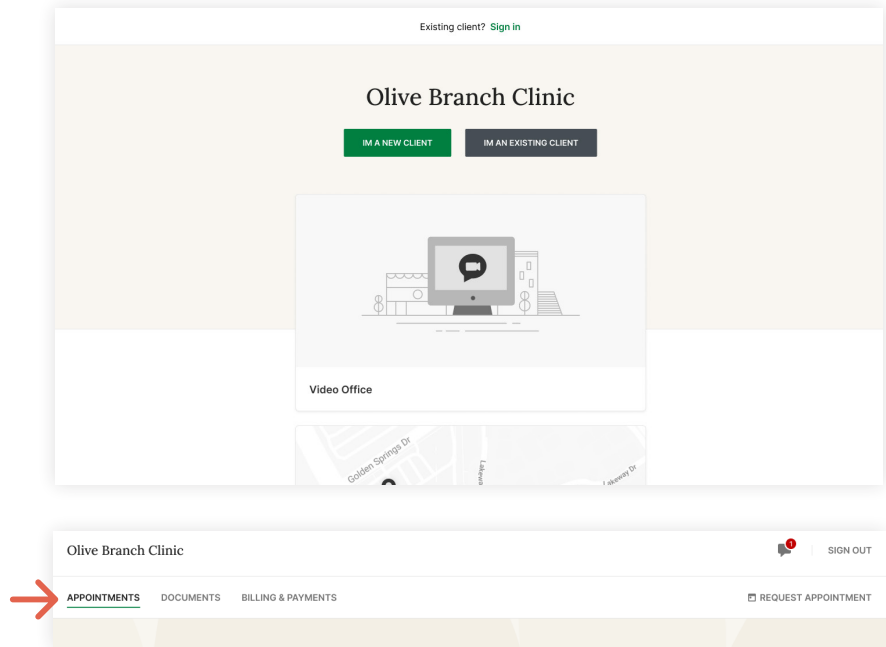
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from [reply@simplepractice.com](mailto:reply@simplepractice.com). 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.

Olive Branch Clinic

APPOINTMENTS DOCUMENTS BILLING & PAYMENTS

REQUEST APPOINTMENT

### Contact information

*Autosaved at 1:45 AM on 08/10/2021*

#### General info

We use this information to understand who you are

First name Last name


Hitesh Solanki

Email address

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

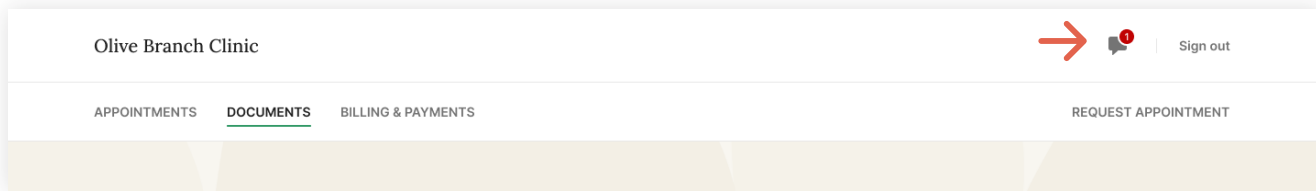
This one-time link will instantly sign you in until X AM/PM (PDT) on MM/DD/YYYY

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.

A screenshot of the Olive Branch Clinic Client Portal. The main content area is titled "Billing & Payments". It shows a "Total Balance \$300" with a green "PAY BILL" button. Below this is a table of "Invoices (7)". To the right, a secure message conversation is open with "Dr. Bryan Sun". The message history shows a patient asking for help with a bill and a doctor replying "Hello". A "Send a message" input box is visible at the bottom of the chat window.

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





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.

The screenshot shows the Olive Branch Clinic client portal interface. At the top, the clinic name 'Olive Branch Clinic' is on the left, and a notification icon with a red '1' and a 'SIGN OUT' link are on the right. Below this is a navigation bar with 'APPOINTMENTS', 'DOCUMENTS' (which is underlined), and 'BILLING & PAYMENTS'. A green button labeled 'REQUEST APPOINTMENT' is on the right side of the navigation bar. The main content area is titled 'Documents' and is divided into two sections: 'Needs to be completed' and 'Completed'. Each section has a 'DATE RECEIVED' header. Under 'Needs to be completed', there are two items: 'Questionnaire' and 'Credit Card Information', both received on May 06, 2020. Under 'Completed', there are three items: 'HIPAA Form', 'Consent Form Title', and 'Practice Policies', all received on May 06, 2020. Each item is represented by a document icon and its name.

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.

The screenshot shows the 'My uploads' section of the client portal. It features a large dashed rectangular box for file uploads. In the center of this box is a small upload icon (a cloud with an upward arrow). Below the icon, the text reads 'Choose file or drag and drop file' in green, followed by 'Optional description text area' in a smaller, grey font.



**Congratulations!**

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

# How to Request Appointments

with  simplepractice

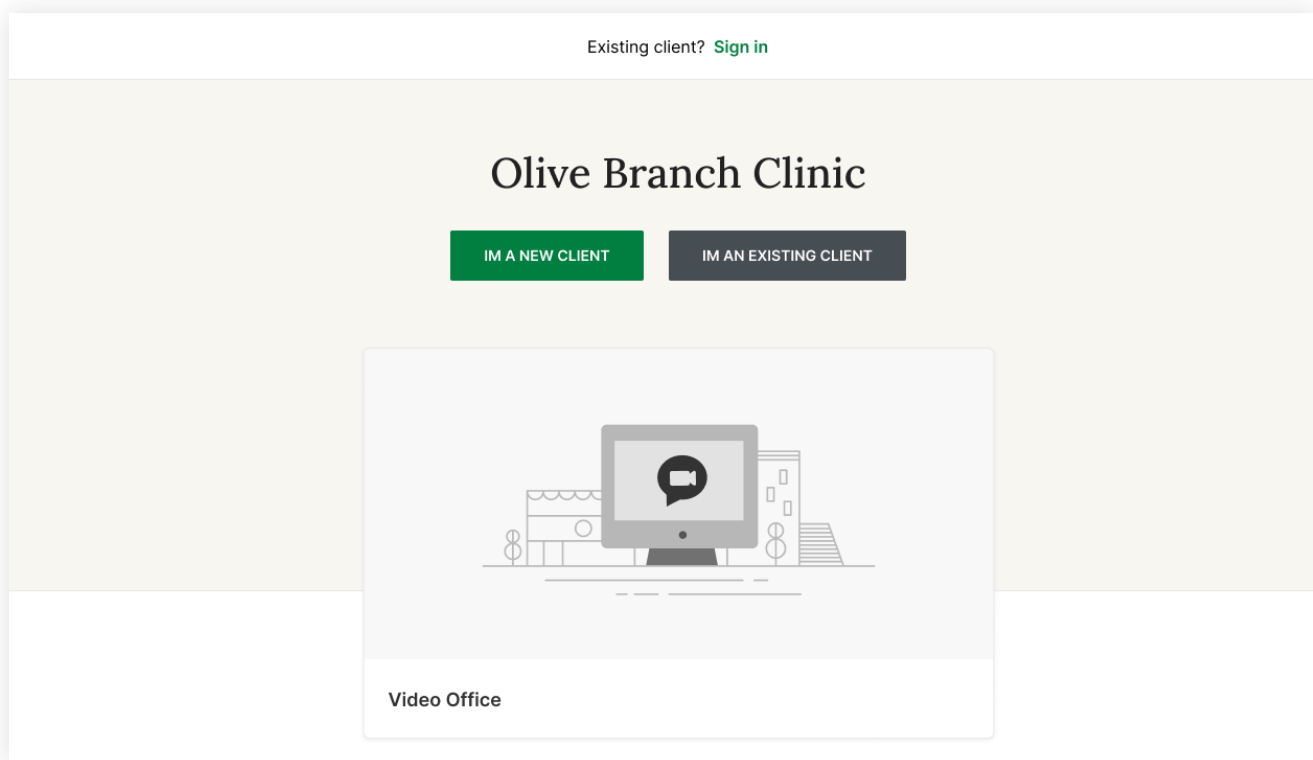
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

## SECTIONS:

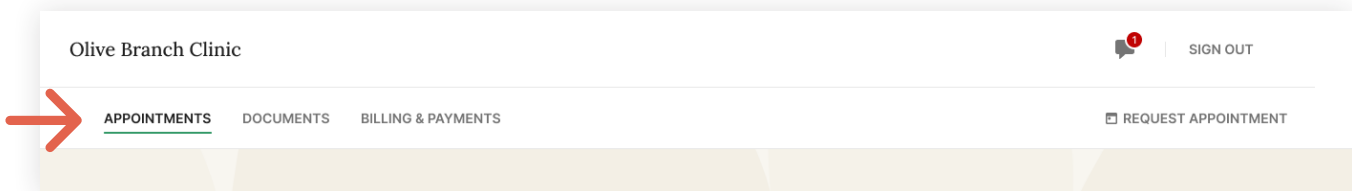
1. Request an appointments
2. Cancelling requests

## 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

- Select service**
- Select location
- Select time and date
- Select client
- 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](#)

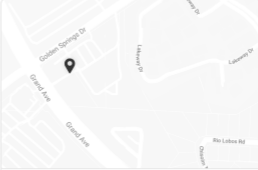
## Request appointment

- Service**  
Psychotherapy,  
60 min 1 hour
- Select location**
- Select time and date
- Select client
- 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!

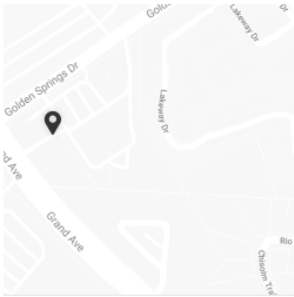
We will send you a confirmation after your appointment has been confirmed

**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

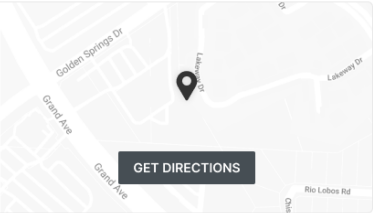
New appointment? [REQUEST NOW](#)

**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 'Appointments' page for Olive Branch Clinic. At the top, the clinic name 'Olive Branch Clinic' is on the left, and the user profile 'Profile: Jamie Appleseed' is on the right. Below this is a navigation bar with 'APPOINTMENTS' (underlined), 'DOCUMENTS', and 'BILLING & PAYMENTS'. A green button labeled 'REQUEST APPOINTMENT' is on the right. The main heading is 'Appointments'. Below this is a section for 'New appointment?' with a green 'REQUEST NOW' button. Underneath are two tabs: 'UPCOMING' (selected) and 'REQUESTED'. A single appointment card is visible under the 'UPCOMING' tab, showing a 'Cancelled' status in a red pill, the date 'OCT 14, 2021', the time '12:55 PM — 1:45 PM PDT', and the clinician 'Dr. Bryan Sun'. To the right of the appointment details is an icon of a computer monitor with a speech bubble, representing a virtual session.

**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.

## GETTING STARTED GUIDE

# 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 \$300

[PAY BILL](#)

#### Invoices (7)

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	<a href="#">Invoice #123</a> <span>Past due</span>	\$100	--	\$100
Aug 10, 2021	<a href="#">Invoice #122</a>	\$100	--	\$100
Aug 03, 2021	<a href="#">Invoice #121</a>	\$100	--	\$100
Jul 29, 2021	<a href="#">Invoice #120</a>	\$200	--	\$200
Jul 28, 2021	<a href="#">Invoice #119</a>	\$400	--	\$400
Jul 22, 2021	<a href="#">Invoice #118</a>	\$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 <span style="float: right;">^</span>				
Date Range: All time				
DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
Aug 11, 2021	<b>Invoice #123</b> <span style="color: red; font-weight: bold;">Past due</span>	\$100	--	<b>\$100</b>
Aug 10, 2021	<b>Invoice #122</b>	\$100	--	<b>\$100</b>
Aug 03, 2021	<b>Invoice #121</b>	\$100	--	<b>\$100</b>
Aug 03, 2021	Card payment	--	(\$100)	<b>\$100</b>
Jul 29, 2021	<b>Invoice #120</b> <span style="color: green; font-weight: bold;">Paid</span>	\$200	--	<b>\$200</b>
Jul 28, 2021	<b>Invoice #119</b>	\$400	--	<b>\$400</b>
Jul 22, 2021	<b>Invoice #118</b>	\$200	--	<b>\$200</b>

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

Account History <span style="float: right;">^</span>															
Date Range: All Time															
<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px;">Date Range: All Time </div> <div style="color: red; font-size: 2em; font-weight: bold;">←</div> </div>		<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;"> <p>«</p> <p>September</p> </div> <div style="text-align: center;"> <p>October</p> <p>»</p> </div> </div>			BALANCE										
All Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	<b>\$300</b>
Last 30 days	29	30	31	1	2	3	4	26	27	28	29	30	1	2	<b>\$0</b>
This Month	5	6	7	8	9	10	11	3	4	5	6	7	8	9	<b>\$150</b>
Last Month	12	13	14	15	16	17	18	10	11	12	13	14	15	16	<b>\$0</b>
This Year	19	20	21	22	23	24	25	17	18	19	20	21	22	23	<b>\$150</b>
Last Year	26	27	28	29	30	1	2	24	25	26	27	28	29	30	<b>\$0</b>
								31	1	2	3	4	5	6	<b>\$0</b>
Mar 11, 2021	<b>Invoice #1094</b> <span style="color: green; font-weight: bold;">Paid</span>							\$150	--					<b>\$150</b>	

**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

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	<b>Invoice #123</b> Past due	\$100	--	\$100
Aug 10, 2021	<b>Invoice #122</b>	\$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

DOWNLOAD PRINT **PAY NOW**

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.