



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

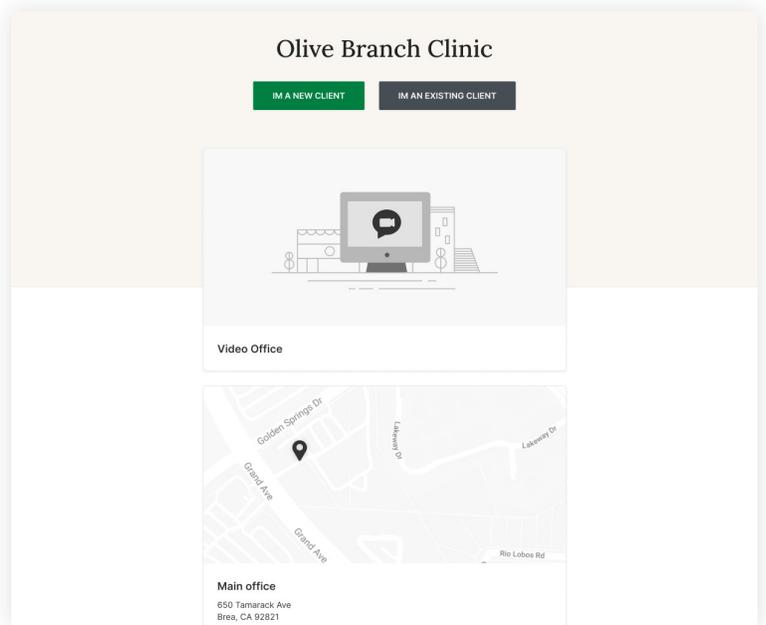


To log back in:

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

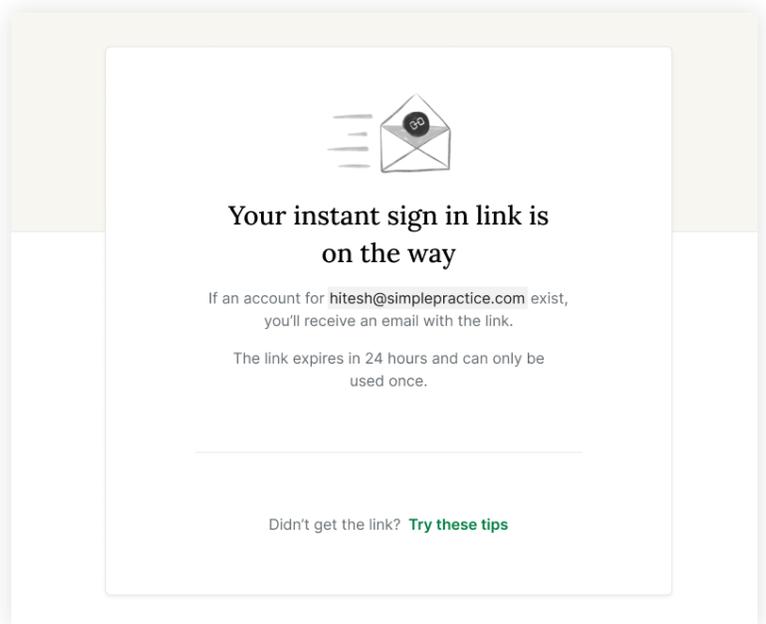
Tip: Bookmark this page so you can log back in easily in the future.

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



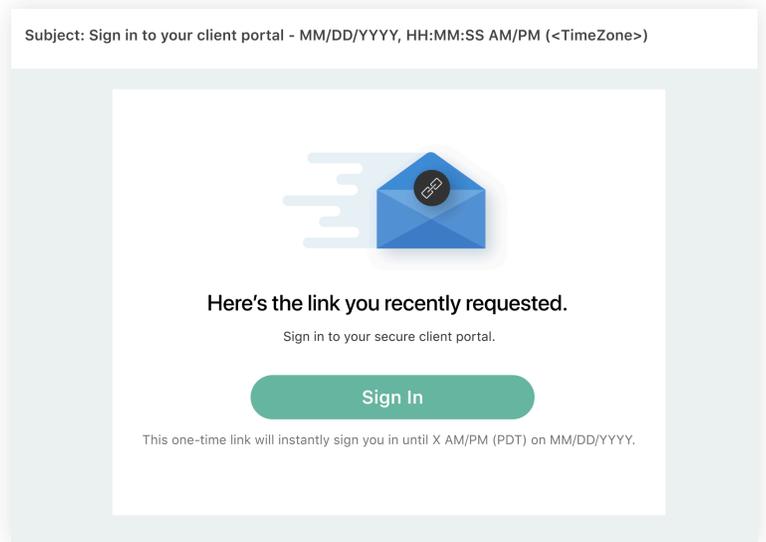
4. Check your inbox to find the sign-in email. Keep in mind that the link in the email is valid for 24 hours and can **only** be used to sign in once.

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

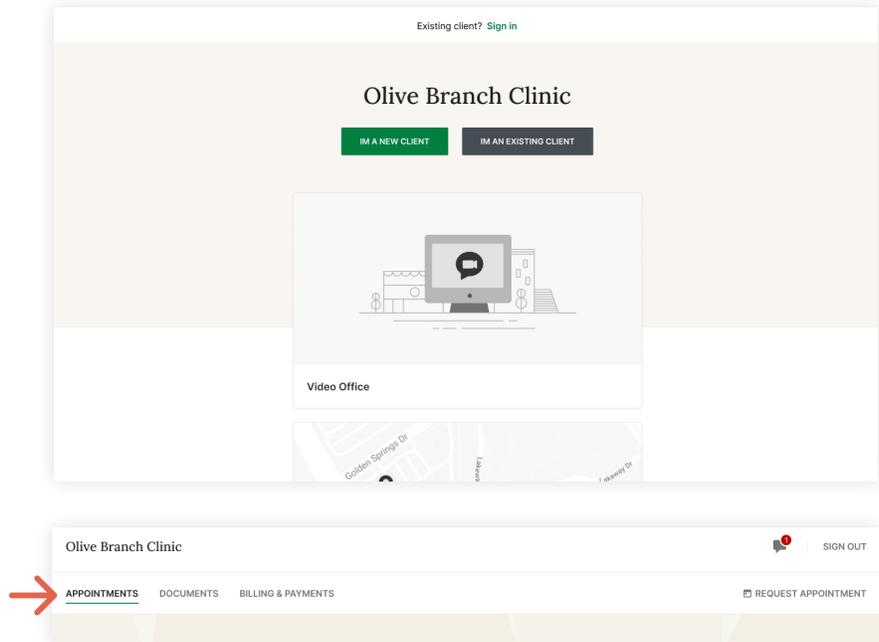
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from no-reply@simplepractice.com. Add this address as a contact to make sure you get these emails in the future.
3. Call your provider's office and **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.

The screenshot shows the Olive Branch Clinic Client Portal "Contact information" form. The form is titled "Contact information" and is autosaved at 1:45 AM on 08/10/2021. It contains a "General info" section with the text "We use this information to understand who you are". There are three input fields: "First name" (Hitesh), "Last name" (Solanki), and "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

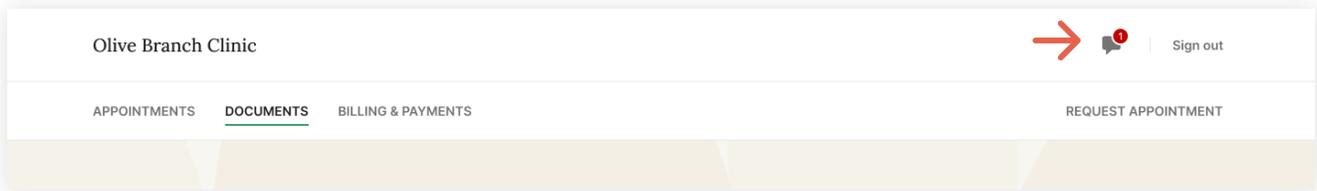
This one-time link will instantly sign you in until X AM/PM (PDT) on MM/DD/YYYY

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" and shows a "Total Balance \$300" with a green "PAY BILL" button. Below this is a table of "Invoices (7)". On the right side, a secure message conversation is open with "Dr. Bryan Sun". The message history shows a "Hello" from the user and a "Can you please help me pay a bill?" message from Dr. Bryan Sun, which is marked as "Delivered". At the bottom of the message window is a "Send a message" input field and a tip: "Tip: To add space between lines, use Shift + Enter".

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.



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 bell 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 positioned to the right 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 dated "May 06, 2020". Under "Completed", there are three items: "HIPAA Form", "Consent Form Title", and "Practice Policies", all dated "May 06, 2020". Each item is preceded by a document icon.

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 cloud icon 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

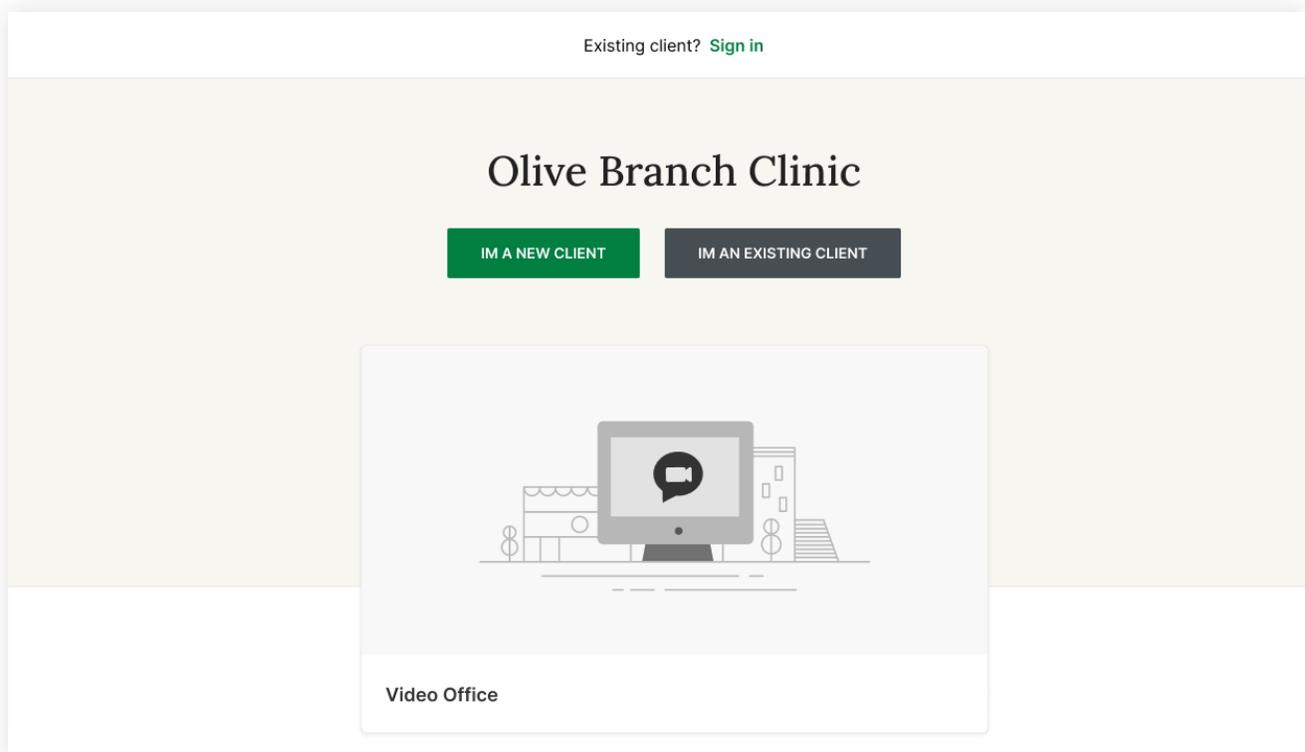
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

SECTIONS:

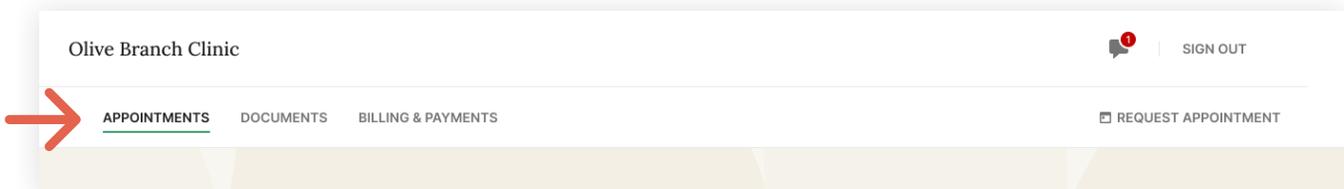
1. Request an appointments
2. Cancelling requests

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 🗨️ 1 | SIGN OUT

< Appointments

Request appointment

- 1 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 🗨️ 1 | SIGN OUT

< Appointments

Request appointment

- Service**
Psychotherapy,
60 min 1 hour
- 2 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!

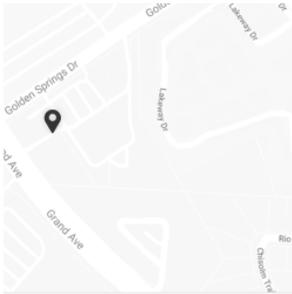
We will send you a confirmation after your appointment has been confirmed

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

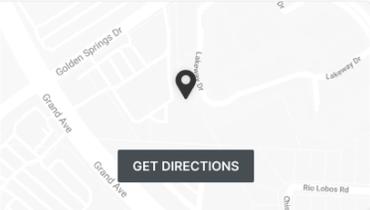
New appointment? [REQUEST NOW](#)

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 right, the user's profile is 'Jamie Appleseed'. The navigation menu includes 'APPOINTMENTS', 'DOCUMENTS', and 'BILLING & PAYMENTS', with 'APPOINTMENTS' being the active tab. A 'REQUEST APPOINTMENT' button is visible in the top right. Below the header, there is a 'New appointment?' section with a 'REQUEST NOW' button. Underneath, there are two tabs: 'UPCOMING' and 'REQUESTED'. The 'UPCOMING' tab is active and shows a cancelled appointment for 'OCT 14, 2021' at '12:55 PM — 1:45 PM PDT' with 'Dr. Bryan Sun' as the provider. An icon of a computer monitor with a speech bubble is shown next to the appointment details.

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	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.

Account history ^				
Date Range: All time				
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
Aug 03, 2021	Card payment	--	(\$100)	\$100
Jul 29, 2021	Invoice #120 Paid	\$200	--	\$200
Jul 28, 2021	Invoice #119	\$400	--	\$400
Jul 22, 2021	Invoice #118	\$200	--	\$200

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

Account History ^				
Date Range: All Time				
<div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center; gap: 5px;"> All Time « September October » </div> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center; gap: 5px;"> <div style="background-color: #f0f0f0; padding: 2px 5px;">Last 30 days</div> <div style="background-color: #f0f0f0; padding: 2px 5px;">This Month</div> <div style="background-color: #f0f0f0; padding: 2px 5px;">Last Month</div> <div style="background-color: #f0f0f0; padding: 2px 5px;">This Year</div> <div style="background-color: #f0f0f0; padding: 2px 5px;">Last Year</div> </div> </div>				
				BALANCE
				\$300
				\$0
				\$150
				\$0
Mar 11, 2021	Invoice #1094 Paid		\$150	--
				\$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
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

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

Buttons: DOWNLOAD, PRINT, **PAY NOW** (indicated by a red arrow)

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 [Close]

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.