

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.

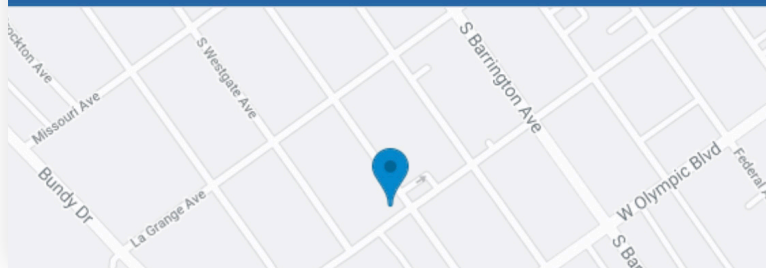
Thank you!

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

Olive Branch Clinic

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.

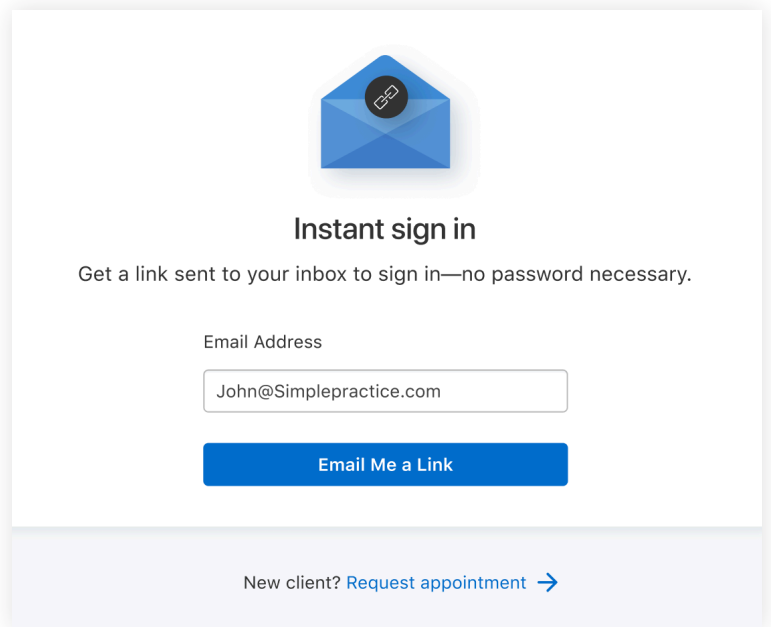
3. Enter the **email address** associated with your account. Click **Email Me a Link**.

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.

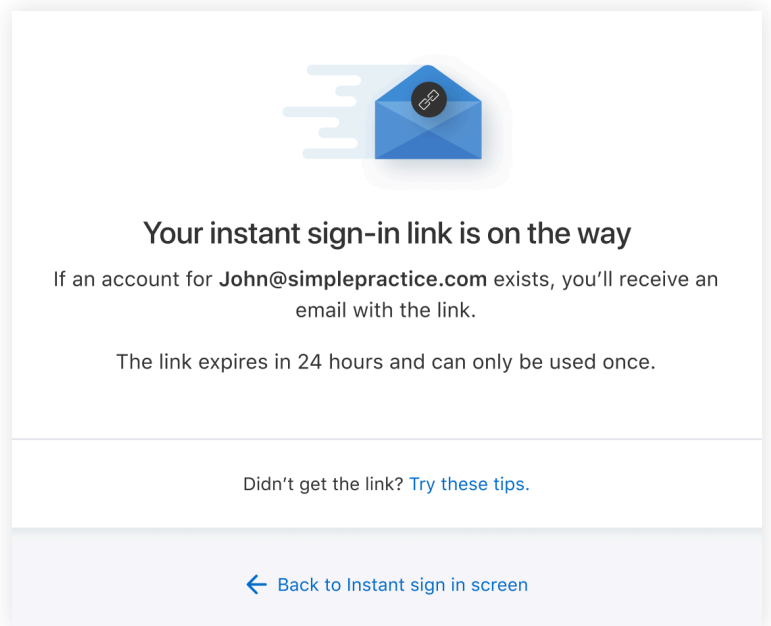
Note: If you don't see the sign-in email in your inbox, click **Try these tips**.

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.

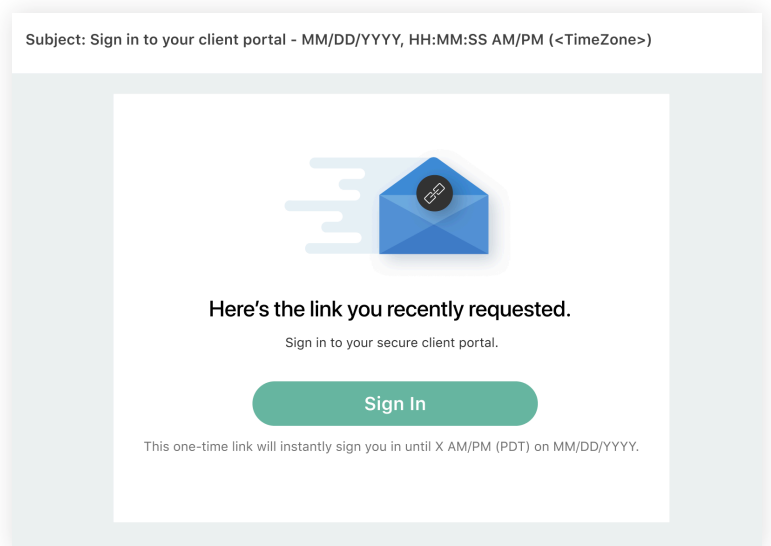


The screen features a blue envelope icon with a keyhole and a key inside, set against a white background with a subtle shadow. Below the icon, the text 'Instant sign in' is centered. Underneath, it says 'Get a link sent to your inbox to sign in—no password necessary.' There is a text input field labeled 'Email Address' containing 'John@Simplepractice.com'. Below the input field is a blue button with the text 'Email Me a Link'. At the bottom of the screen, there is a light blue footer with the text 'New client? Request appointment →'.



The screen features a blue envelope icon with a keyhole and a key inside, set against a white background with a subtle shadow and motion lines to the left. Below the icon, the text 'Your instant sign-in link is on the way' is centered. Underneath, it says 'If an account for John@simplepractice.com exists, you'll receive an email with the link.' Below that, it says 'The link expires in 24 hours and can only be used once.' At the bottom of the screen, there is a light blue footer with the text 'Didn't get the link? Try these tips.' and a blue arrow pointing left with the text 'Back to Instant sign in screen'.

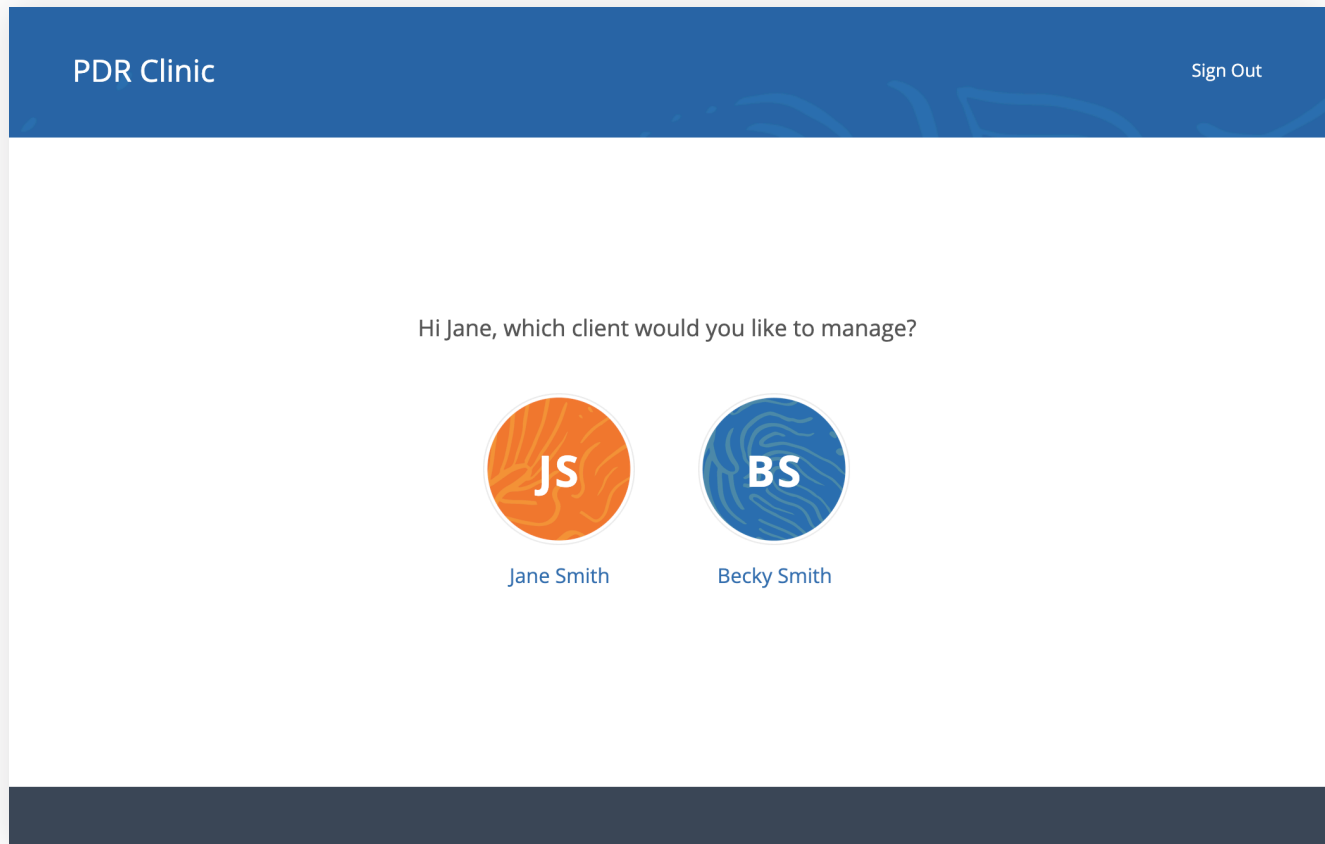
Subject: Sign in to your client portal - MM/DD/YYYY, HH:MM:SS AM/PM (<TimeZone>)



The screen features a blue envelope icon with a keyhole and a key inside, set against a white background with a subtle shadow and motion lines to the left. Below the icon, the text 'Here's the link you recently requested.' is centered. Underneath, it says 'Sign in to your secure client portal.' Below that, there is a green button with the text 'Sign In'. At the bottom of the screen, there is a light blue footer with the text 'This one-time link will instantly sign you in until X AM/PM (PDT) on MM/DD/YYYY.'

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

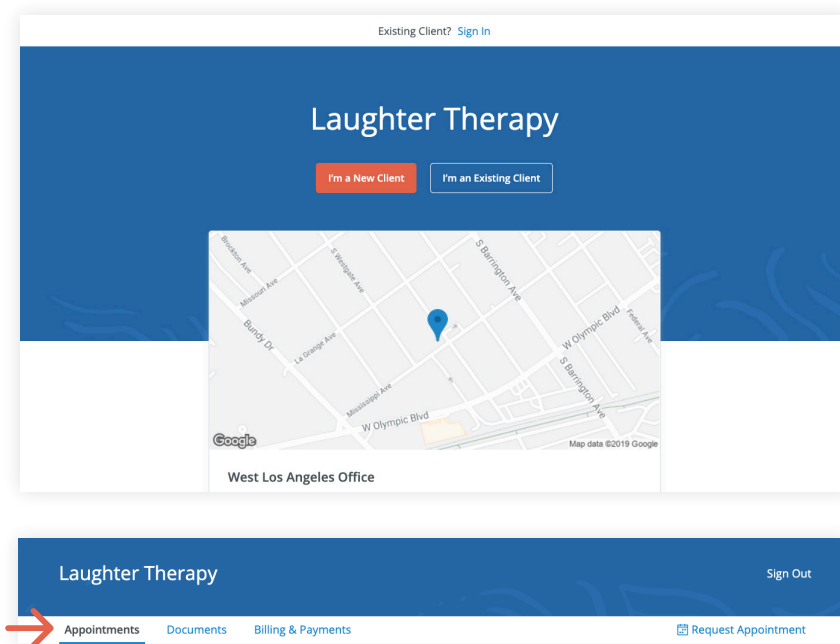
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from no-reply@simplepractice.com. Add this address as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

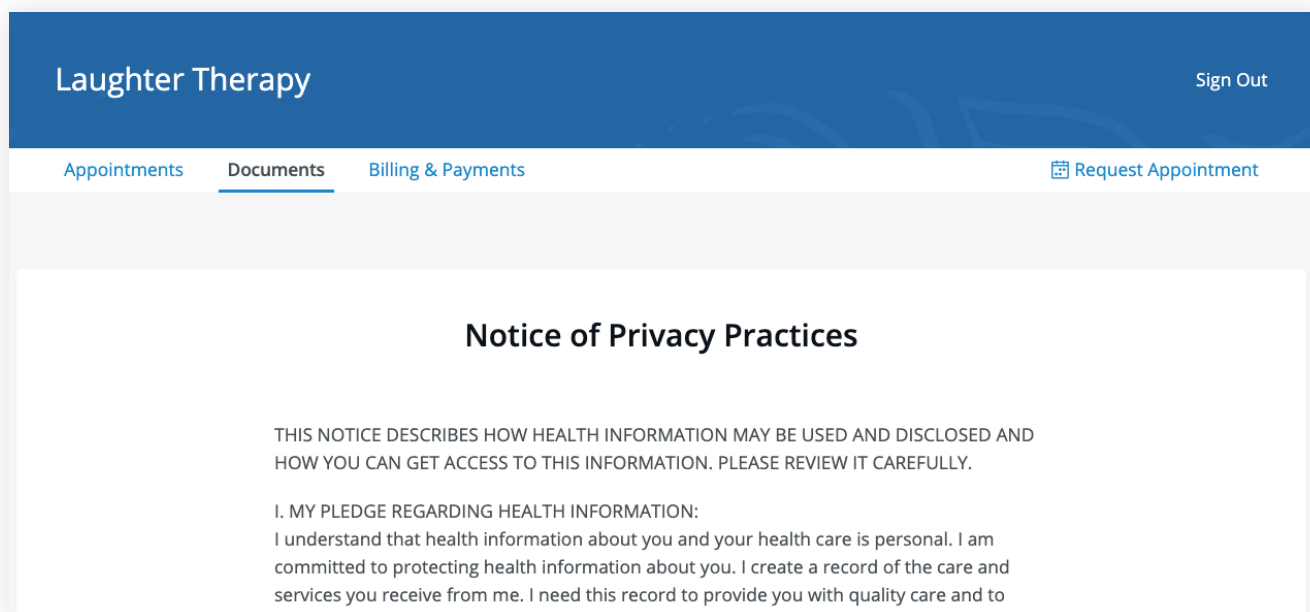
To request appointments through the Client Portal:

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.



Some documents can be signed electronically 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 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, there is a blue header with the clinic name and a 'Sign Out' button. Below the header is a navigation bar with tabs for 'Appointments', 'Documents' (which is selected), and 'Billing & Payments'. A 'Request Appointment' button is also visible. The main content area is titled 'Documents, Forms and Files' and is divided into two sections: 'Needs to be completed' and 'Completed'. Each section contains a table of documents with their names and dates.

Needs to be completed	Date received
Standard Intake Questionnaire Template	Sep 27, 2019

Completed	Date completed
ABA Child Intake Form	Oct 22, 2019
Notice of Privacy Practices	Sep 27, 2019
Informed Consent for Psychotherapy	Sep 27, 2019
Practice Policies	Sep 27, 2019

At the bottom of the **Documents** tab, you will be able to upload files to share with your clinician, including pdf, jpg, png, mp3, m4a, or csv files. You can click to view these at any time.

The screenshot shows the 'My Uploads' section of the client portal. It features a large dashed rectangular area for file uploads. In the center of this area is a document icon and the text 'Upload Files or drop files here'. Below this text, it specifies the supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. Below the upload area, there is a table listing the uploaded files.

My Uploads	
Screen Shot 2019-10-10 at 11.17.18 AM.png	Oct 14, 2019



Congratulations!

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