simplepractice *LEARNING*

Complete Guide to the Client Portal
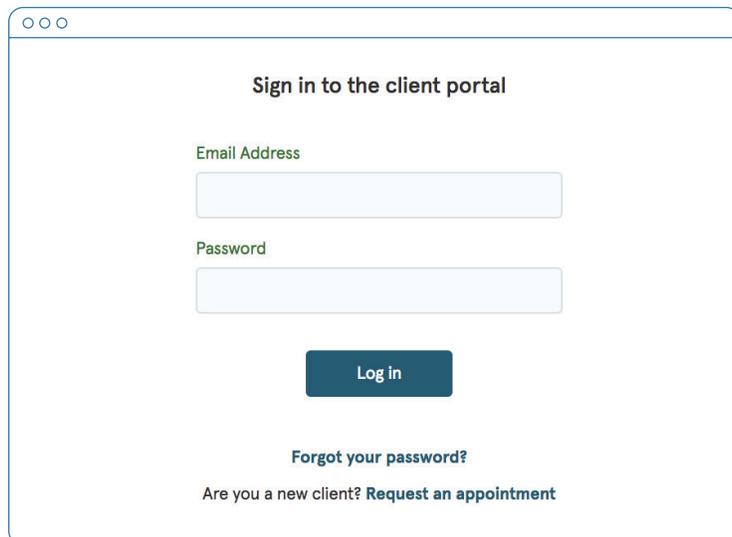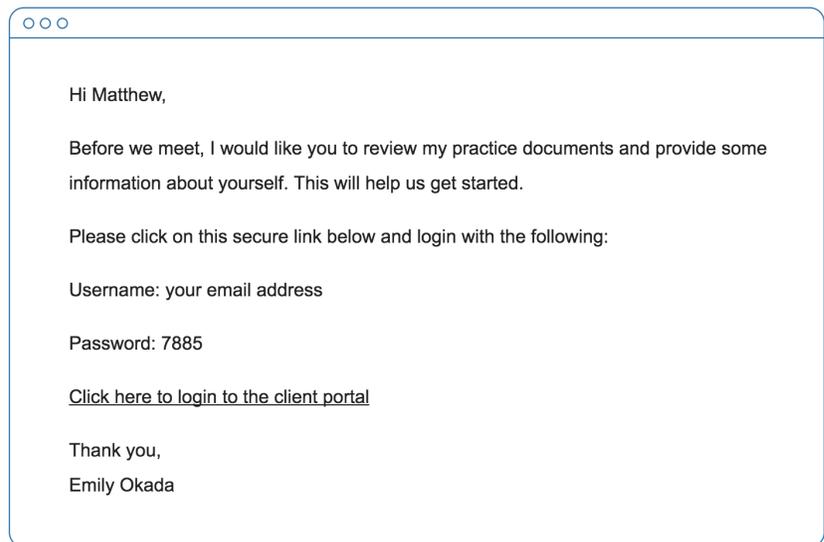
The Client Portal

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 session fees.

SECTIONS:

1. How do I log in?
2. Troubleshooting
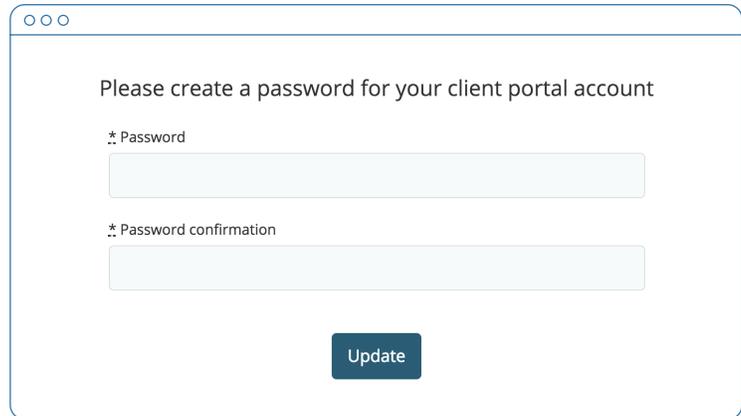3. Online booking
4. Documents and forms

1.
How do I log in?

Before logging into the Client Portal for the first time, you'll receive a welcome email from your clinician that looks like this:

Hi Matthew,

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 click on this secure link below and login with the following:

Username: your email address

Password: 7885

Click here to login to the client portal

Thank you,
Emily Okada

Sign in to the client portal

Email Address

Password

Log in

Forgot your password?

Are you a new client? **Request an appointment**

1. Click on the link the the welcome email.

2. You will arrive at the **Welcome Page**, where you can enter your Username and Password.

3. Enter your email address in the **Email Address** field and your 4-digit PIN number from the email in the **Password** field. This is your temporary password.

4. You'll then be prompted to create a password.

5. Enter a new password, then re-enter it, and click **Update**. This will be your password moving forward, each time you access the Client Portal. Be sure to write it down!

6. You are now logged in.

Please create a password for your client portal account

* Password

* Password confirmation

Update

You will now be able to login to the Client Portal at any time, using your email address as your username and the password that you created above.

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

2. 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. If your clinician re-sends you an invitation, be sure to **use the latest 4-digit passcode** to log in. *Note: some email providers will collapse the emails into the same thread. Be sure to select the email that you received most recently. If you're not sure what your current 4-digit passcode is, your clinician can provide that info for you.*

3. 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.

4. Double-check your spelling. Your login credential for access will be your exact email address--the same email address where the invitation is delivered, so all spelling must be exact.

5. The same email can't be used for more than one portal account for the same clinician.

> Tip: you only use the 4-digit passcode once. For each subsequent login, you'll use the new (8 or more digit) password that you created.

6. You can recover your password by clicking **"Forgot your password?"** below the Log in button. You'll be asked to enter your email address, and then you'll receive a password recovery email. Be sure to use the same email address that you normally use to log into your Client Portal, and check your spam
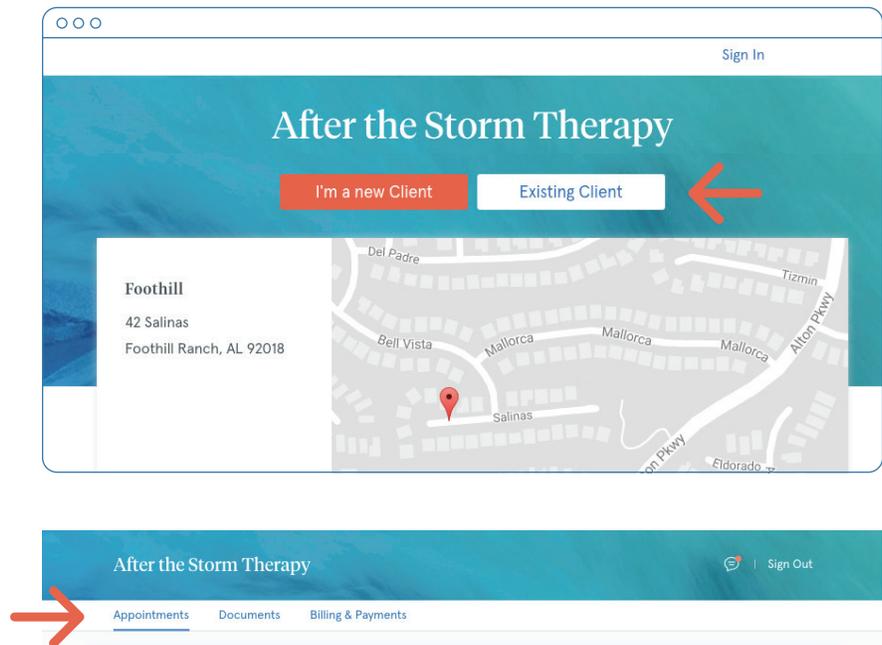
3. Online Booking

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.

GETTING STARTED

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).

4. Documents and Forms

The first time you log into the Client Portal, you'll see a welcome message from your clinician. Click **Get Started** to start filling out the forms that your clinician shared with you.

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.

Your clinician may also share some forms with you. Fill out as many fields as you can, then click **Submit**.

After submitting, the you'll see a confirmation page where you can **Make Corrections** or **Submit** the information:

Click **Submit**.

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

Secure Messaging
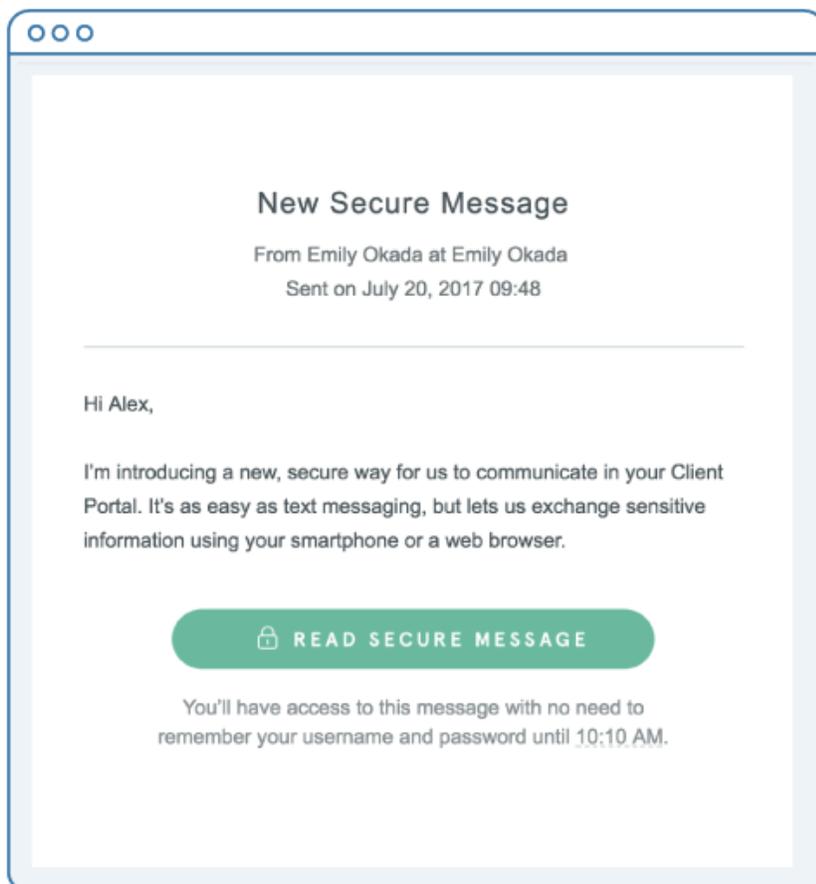
with **simplepractice**

Secure Messaging lets you send and receive messages directly with your clinician. Reschedule your session or ask your therapist a question right from your phone!

WHY USE SECURE MESSAGING?

· Keep all your therapy-related communication in the same place.

· It's as easy as texting, and you can do it from your phone.

· All of your messages are 100% private and secure.

HOW DOES IT WORK?

When your clinician sends you a secure message, you'll receive an email that looks like this:

New Secure Message

From Emily Okada at Emily Okada
Sent on July 20, 2017 09:48

Hi Alex,

I'm introducing a new, secure way for us to communicate in your Client Portal. It's as easy as text messaging, but lets us exchange sensitive information using your smartphone or a web browser.

🔒 READ SECURE MESSAGE

You'll have access to this message with no need to remember your username and password until 10:10 AM.
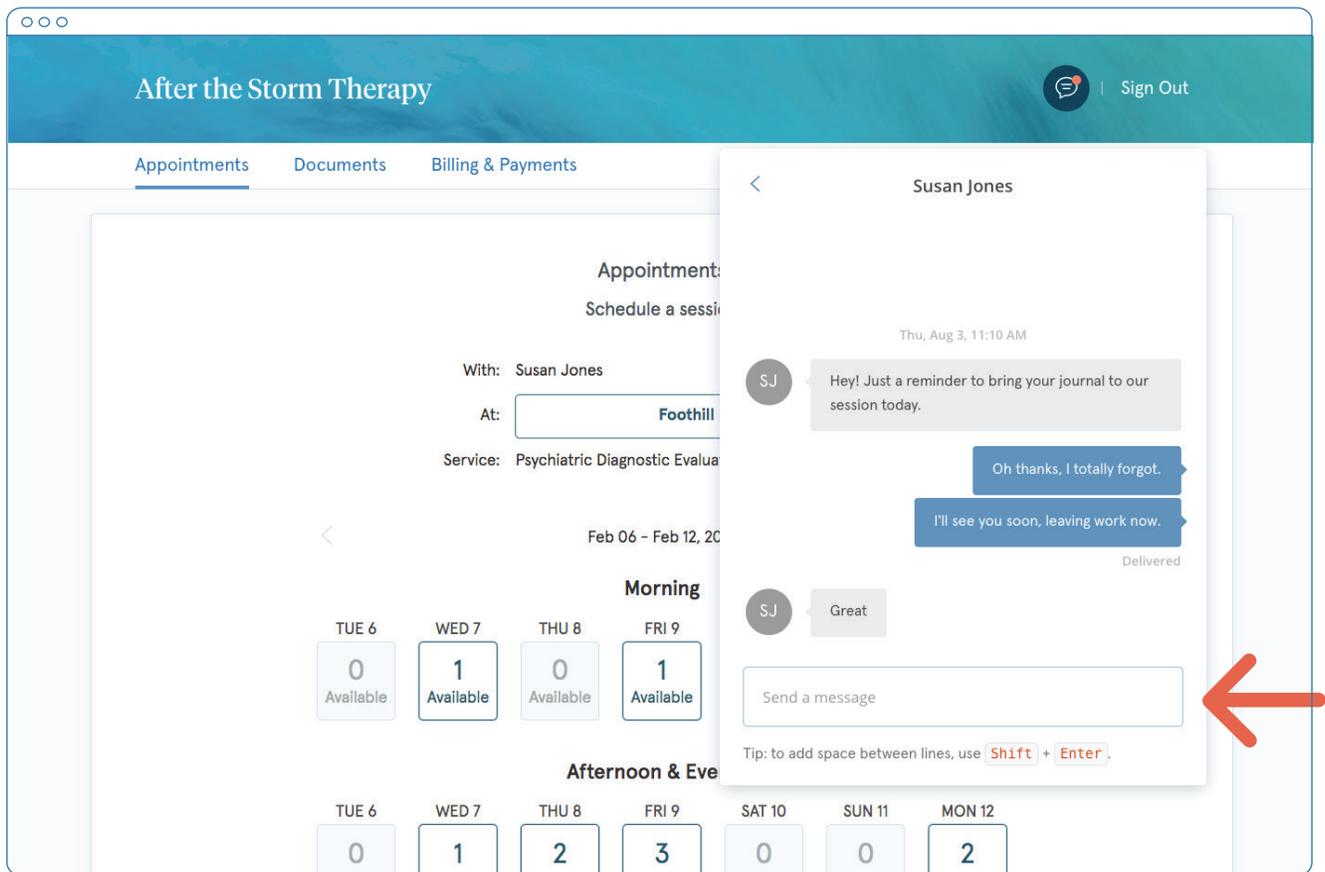
1. Click on the **Read Secure Message** button to access your message. Your link will be active for 15 minutes from the time the email is sent. During this time, you can view your message directly after you click the link.
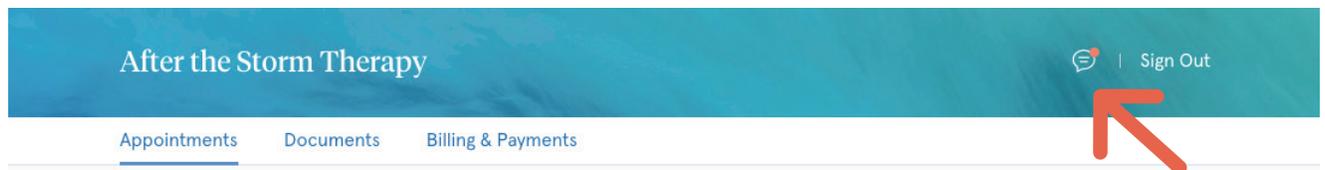
Note: After 15 minutes, you'll have to enter your Client Portal username and password to log in and view your message.

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.

3. Start typing your message in the box that says "Send a message," then hit **Send** when you're ready.

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.

You can click on the **Secure Message icon** at any time to open the messaging widget and send a message to your clinician.

Congratulations!
You're now ready to start sending Secure Messages through your Client Portal.

Online Booking

with **✦simple**practice

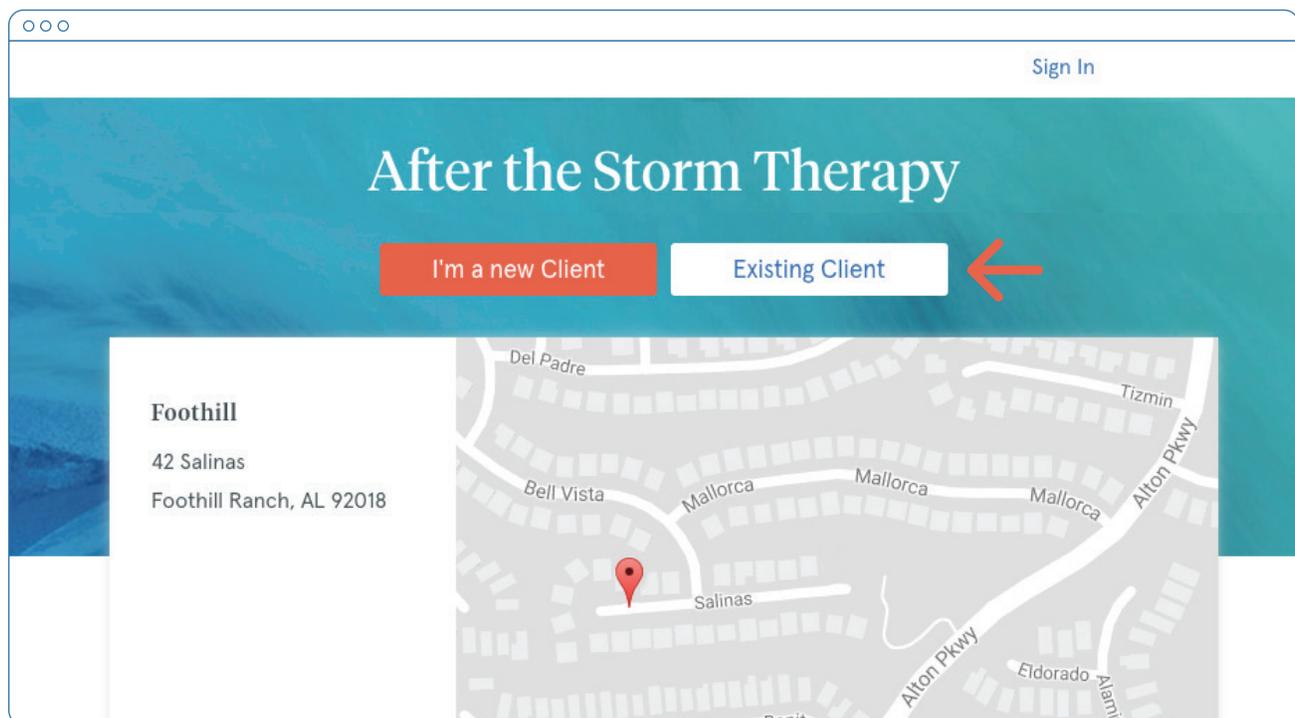Online Booking lets you request, cancel, or reschedule appointments with your clinician.

SECTIONS:

1. Request a session
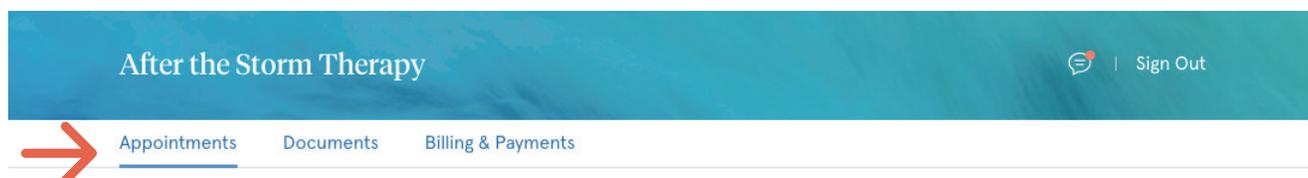
2. Cancelling requests

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).
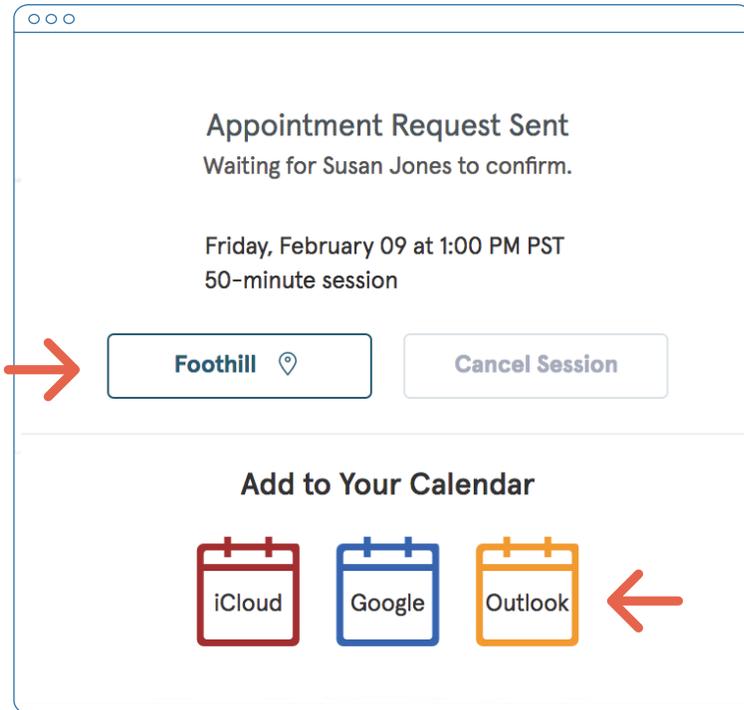

2. Navigate to the appointments tab. (This may already be selected by default after you log in).

After the Storm Therapy

Appointments   Documents   Billing & Payments

Appointments
Schedule a session

3 With: Susan Jones

4 At: Foothill ⊙

Service: Psychiatric Diagnostic Evaluation (90791)

‹   **5** Feb 06 – Feb 12, 2018   ›

Morning

TUE 6	WED 7	THU 8	FRI 9	SAT 10	SUN 11	MON 12
0 Available	1 Available	0 Available	1 Available	0 Available	0 Available	1 Available

Afternoon & Evening

TUE 6	WED 7	THU 8	FRI 9	SAT 10	SUN 11	MON 12
3 Available	1 Available	2 Available	3 Available	0 Available	0 Available	2 Available

Pacific Time (US & Canada) UTC−08:00 (change)

3. Select your **clinician** (if there are multiples) and your preferred **office location** from the dropdown menus.

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

5. Click one of the **available** boxes to see specific times. You'll see that these boxes are split into morning (up until 12 noon), and afternoon & evening (12pm onwards). Clicking the arrows on the top left and right will let you move from week to week.

6. Click on the **time** that you'd like to request.

Select a Start Time
Friday, February 09

‹

12:00 PM
6 01:00 PM
02:00 PM

Note: To go back to the previous screen with all of the days, click the back button (top left).

Appointment Request Sent
Waiting for Susan Jones to confirm.

Friday, February 09 at 1:00 PM PST
50-minute session

Foothill 📍   Cancel Session

Add to Your Calendar
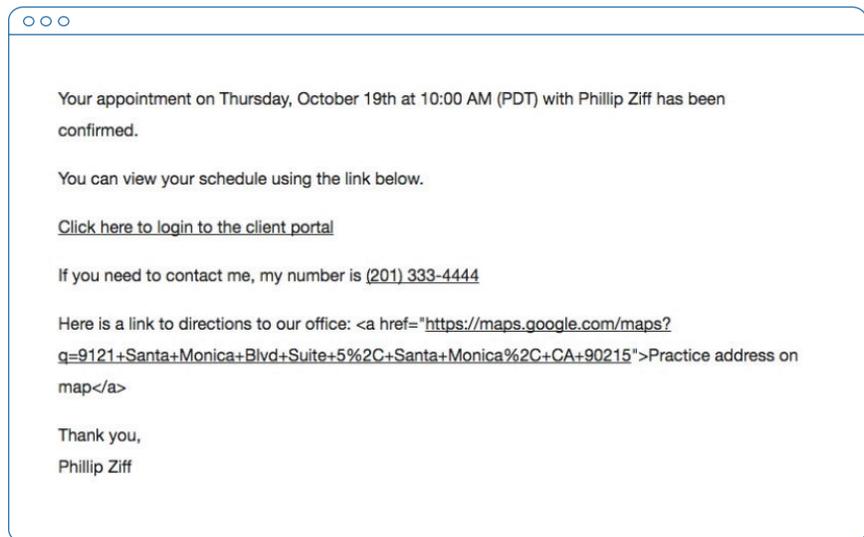
iCloud   Google   Outlook
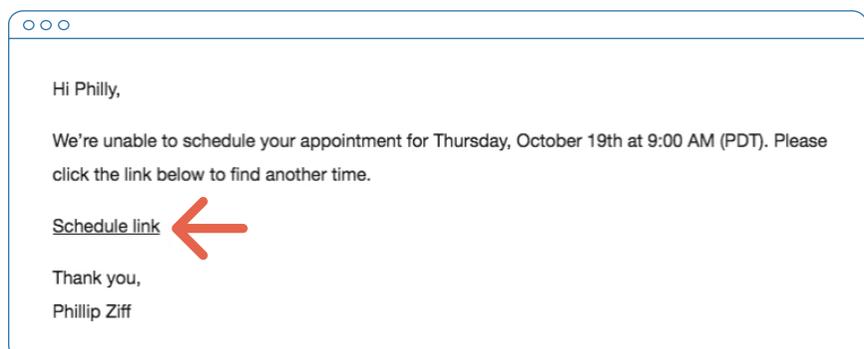
7. Your appointment request is now confirmed.

Note: This doesn't mean that the request has been accepted by your clinician yet.

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

8. When your appointment request is accepted, you'll receive an email confirming the session:

Your appointment on Thursday, October 19th at 10:00 AM (PDT) with Phillip Ziff has been confirmed.

You can view your schedule using the link below.

Click here to login to the client portal

If you need to contact me, my number is (201) 333-4444

Here is a link to directions to our office: Practice address on map

Thank you,
Phillip Ziff

9. If they cannot see you at that time, you'll receive an email with a link to reschedule.

Click the link to go back to your client portal and request a new session.

Hi Philly,

We're unable to schedule your appointment for Thursday, October 19th at 9:00 AM (PDT). Please click the link below to find another time.

Schedule link

Thank you,
Phillip Ziff

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, below the calendar.

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 page 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 managing appointments in your Client Portal.

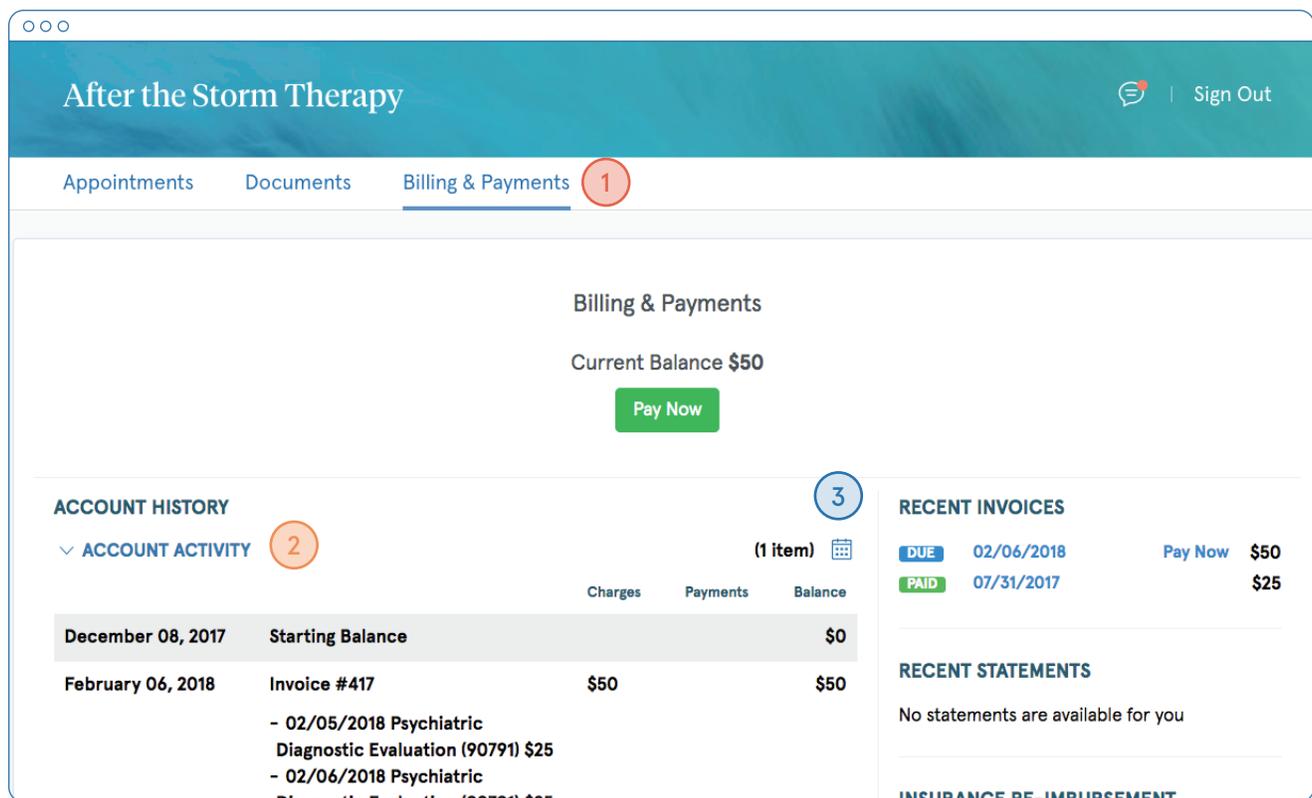# Billing & Payments

with **✿simple**practice

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. Click **Account Activity** to either hide or show your most recent sessions and payments.

3. You can also **adjust the date range** to display whichever sessions you'd like by clicking the **calendar icon**: 🗓
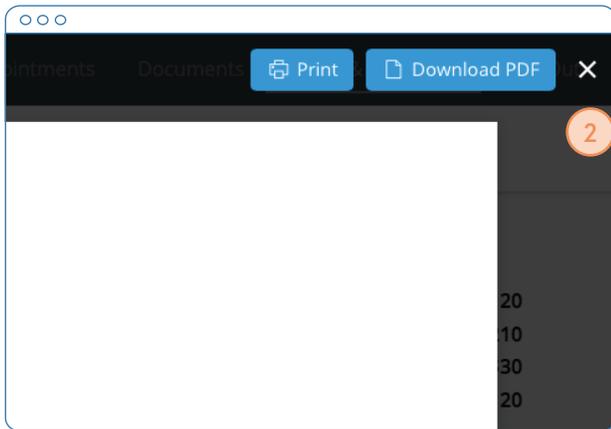

After the Storm Therapy

Appointments   Documents   **Billing & Payments** (1)   💬 | Sign Out

Billing & Payments

Current Balance **$50**

Pay Now

ACCOUNT HISTORY

⌄ ACCOUNT ACTIVITY (2)

(3)

(1 item) 🗓

		Charges	Payments	Balance
December 08, 2017	Starting Balance			$0
February 06, 2018	Invoice #417	$50		$50
	– 02/05/2018 Psychiatric Diagnostic Evaluation (90791) $25			
	– 02/06/2018 Psychiatric Diagnostic Evaluation (90791) $25			

RECENT INVOICES

DUE   02/06/2018   Pay Now $50

PAID   07/31/2017 $25

RECENT STATEMENTS

No statements are available for you

INSURANCE RE-IMBURSEMENT

On the right side, you'll see three sections containing recent invoices, recent statements, and recent insurance reimbursement statements (superbills).

1. Click the **specific date** for a document to open (all light blue dates are clickable links).

2. Click **X in the top, right corner** to close the document (see image below).

Tip: Once you open a document, you can click Print to print it or Download PDF to download it to your computer.

3. Click **View All** to see all of your past documents in that category.

RECENT INVOICES

DUE	10/23/2017 (1)	Pay Now	$120
PAID	10/23/2017		$210
PAID	10/10/2017		$30
PAID	09/29/2017		$120

View All (3)

RECENT STATEMENTS

October 10, 2017 (1)
September 10, 2017
August 10, 2017
July 10, 2017

View All (3)

INSURANCE RE-IMBURSEMENT STATEMENTS

May 24, 2017 (1)
March 07, 2017
February 10, 2017
January 30, 2017

View All (3)

INSURANCE RE-IMBURSEMENT STATEMENTS

All time

ISSUED	ID	AMOUNT
May 24, 2017	SB #0095	$80
March 07, 2017	SB #0087	$380
February 10, 2017	SB #0082	$180
January 30, 2017	SB #0080	$500
October 06, 2016	SB #0074	$480

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.
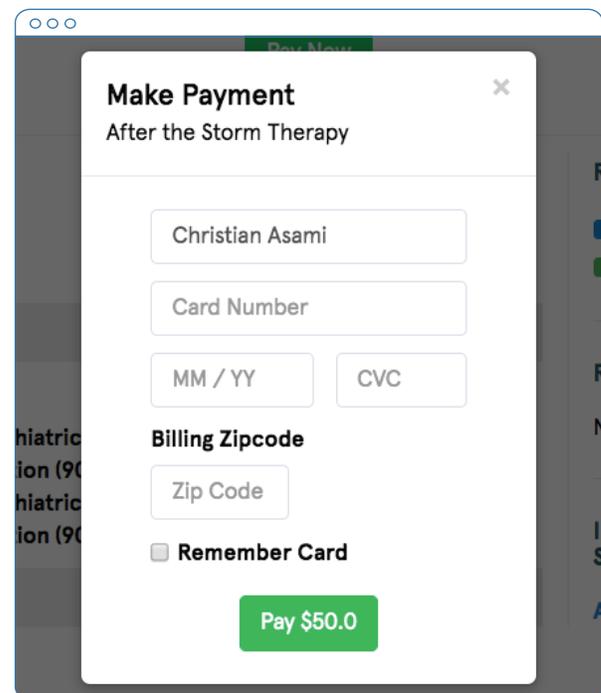
1. To pay your entire balance, click **Pay Now next to the balance amount**.

2. To pay a specific invoice, click **Pay Now next to the invoice amount** in the Recent Invoices section.

Note: You can also pay an unpaid invoice by opening up that invoice and clicking the Pay button at the top of the document.

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 **Remember 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 recent invoice section has changed from **Due** to **Paid**.

If you stored the card, you'll be able to select this card from a dropdown menu for future payments.

Congratulations!

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

Telehealth

by **✿simple**practice

This guide includes basic tips and instructions on how to join a video session, as well as some FAQs to make your first video call a success.

To prepare, please review the following information before your first video appointment. You may still have questions, so please do not hesitate to reach out.

What equipment do I need?

To participate in Telehealth appointments from your home, you will **one** of the following devices:

1. **Desktop computer** with a webcam and speakers

2. **Laptop computer** with built-in webcam and speakers

3. **Tablet device** with built-in webcam and speakers

4. **Smartphone** (**Note:** To use a smartphone, you must first download **Telehealth by SimplePractice** - available for iOS or Android in the app store)

You will also need an **internet connection that is at least 10mbps**. For optimal results, a reliable, high-speed internet connection with a bandwidth of at least 10 mbps will minimize connection issues and provide the best quality.

> **Note:** We recommend using the Pre-call Tool to check your internet connection:
>
> **tokbox.com/developer/tools/precall/**

What is Telehealth?

Through audio and video over the internet, you can meet with your clinician on-the-go from your desktop, laptop, tablet, or mobile device (iOS or Android) - it's your choice!

Telehealth allows us to connect anywhere with secure and convenient appointments that save you time and hassle. There's no need to deal with traffic when you can schedule and attend your appointments directly from a laptop or mobile device.

How to join on a desktop or laptop computer

If you plan to use a desktop or laptop, there is nothing to download prior to your appointment. Here are the steps to join:
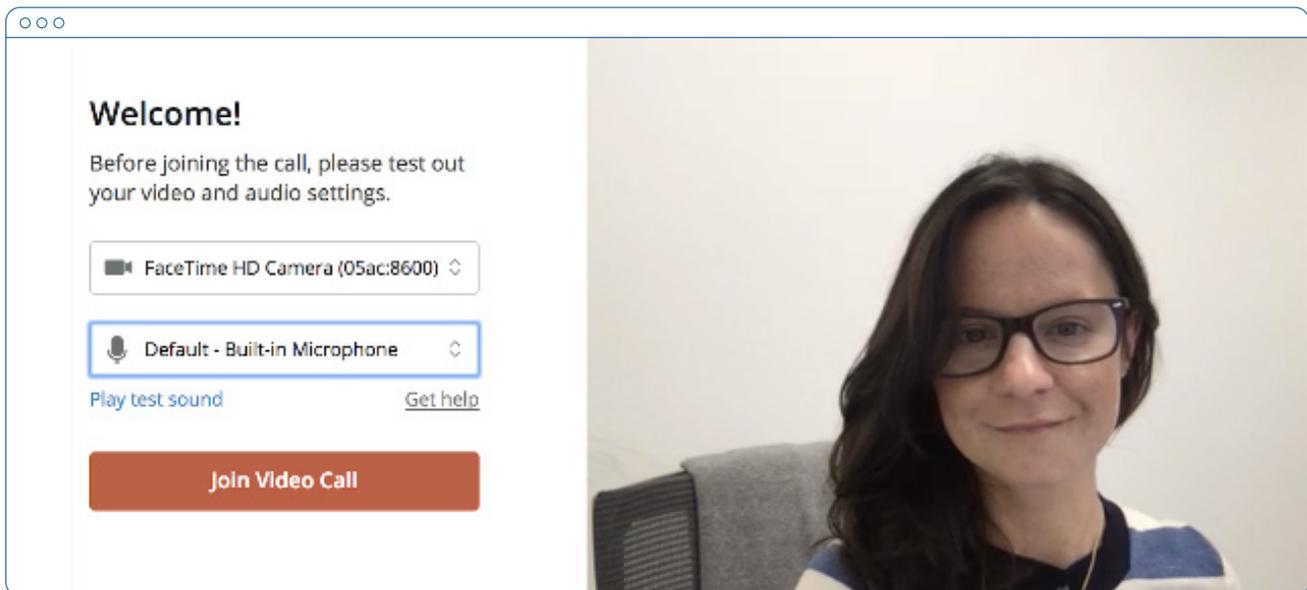
1. Approximately 10 minutes before your appointment, you should receive either an email or SMS text appointment reminder.

> **Note:** If you have already consented to receiving text and/or email reminders, you will continue to receive them for Telehealth appointments as well. For **new clients**, make sure you have provided your email and or mobile phone number so that I can enable email or text reminders.

2. Click the unique link embedded in the reminder. Your video call screen will now open in a new tab.

> **Note:** You may have to copy and paste the link into your web browser.

3. If I have already joined the call, you will see my face on the screen. If I have not, you will see yourself, as shown below.

4. You will also see the Welcome prompt. Click Play test sound to test the your your camera and microphone settings.

5. When you are ready, click **Join Video Call**. This will take you straight into the video call.

> Note: There may be a slight delay for me to join the session if I am finishing with a previous session. Please be patient and I will join momentarily.
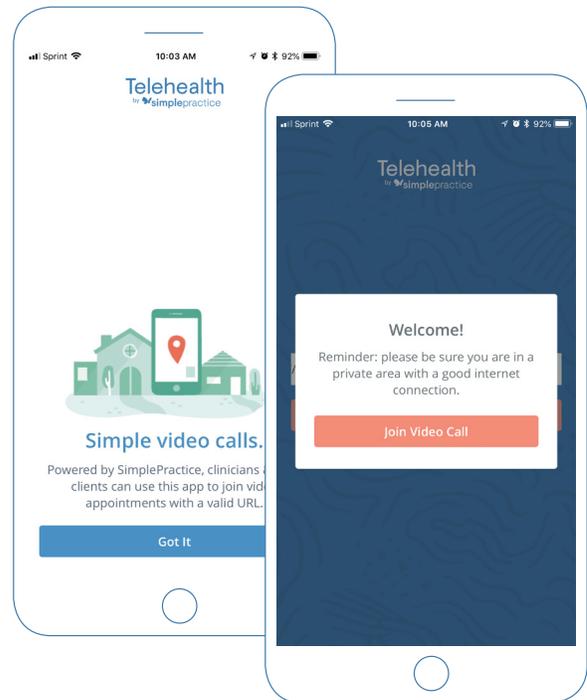
How to join on a smart phone

If you plan to use a mobile device, here are the steps to join:

1. Choose a well-lit, quiet room in your house to have your appointment. Do not sit directly in front of windows due to back lighting.

2. Download **Telehealth by SimplePractice** (for iOS or Android) in the app store. Approximately 10 minutes before your appointment, you should receive either an email or SMS text appointment reminder.

Note: If you have already consented to receiving text and/or email reminders, you will continue to receive them for Telehealth appointments as well. For **new clients**, make sure you have provided your email and or mobile phone number so that I can enable email or text reminders.

3. Open the reminder on your mobile device, and click the unique link. This will open the **Telehealth by SimplePractice app**.

4. If I have already joined the call, you will see my face on the screen. If I have not, you will see yourself.

5. When you are ready, click **Join Video Call**. This will take you straight into the video call.

Note: There may be a slight delay for me to join the session if I am finishing with a previous session. Please be patient and I will join momentarily.

Simple video calls.

Powered by SimplePractice, clinicians and clients can use this app to join video appointments with a valid URL.

Got It

Welcome!

Reminder: please be sure you are in a private area with a good internet connection.

Join Video Call

GET IT ON Google Play

Download on the App Store

TIPS FOR SUCCESS

· I recommend joining the video session a few minutes early to test your settings.

· If you can connect to the Internet, but are having trouble joining the video, you can use our recommended **Pre-call Tool**: tokbox.com/developer/tools/precall/

· To use a smartphone to join a video chat, you must first download the **Telehealth by SimplePractice app** available in the app store for iOS or Android.

· If you need to cancel or have questions about the appointment, please contact me.

FAQS

Q. What should I do if I didn't get the reminder with the link?

Contact me if you did not get the link so I can send it to you via email or secure messaging.

Q. What is SimplePractice?

SimplePractice, LLC is my practice management software for scheduling, case management, and telehealth, and therapy notes. SimplePractice, LLC, uses a HIPAA compliant software so your information will be securely kept.

Q. What can I do to do improve the quality of the connection?

If you live in an area with slow internet, this can really affect the speed of your connection. Here are some basic steps that can improve the overall quality:

· **Use wired Ethernet instead of wifi whenever possible.** Wifi will work, but you may experience a lag and interference, which can make your video and audio choppy. Wired internet will give you a much smoother, more consistent experience.

· **Test your internet connection speed.** Google provides an easy way to test your internet connection directly from the google homepage. Simply search: internet speed test. Click the blue button that says **Run Speed Test**. If it is under 10mbps and you're using wifi, try using a wired internet connection or restarting your router.

· **Close other programs.** If you have several programs running in the background, closing them will almost certainly improve the quality. Also, make sure you're not downloading an large files.

If you are unable to connect, please contact me as soon as possible to see if I can help you troubleshoot.

Q. Where's the best place to do a video call?

When deciding the best place in your home, you will want to choose a space that is private and away from household members, coworkers, pets or any other potential distractions. Here are some additional recommendations:

• **Adjust your light.** Some small lighting tweaks that can have a huge impact including placing a lamp or other light source behind your monitor, pointed toward you. Also, make sure you don't have too much light behind you. If you're on a laptop, make sure the camera is at eye level and not pointing up at the ceiling lights, or down at the floor.

• **Choose a quiet, private location.** Identify a suitable room that is quiet, private, and free of distractions. To keep background noise to a minimum, close any doors and shut any windows.

Q. Is Telehealth private?

Just like a face-to-face appointment, your Telehealth visit will be private and confidential.

Congratulations!
You're now ready to start using Telehealth by SimplePractice.