



1 How to Log in 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.

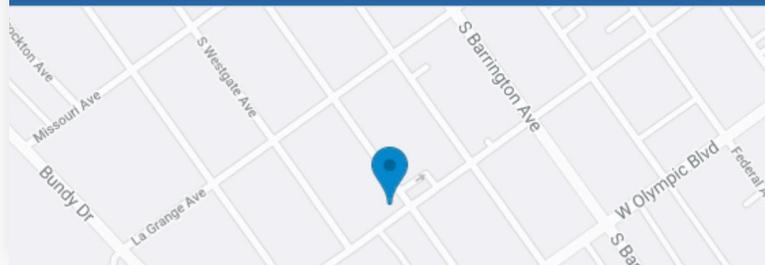
Thank you!

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

Olive Branch Clinic

I'm a New Client

I'm an Existing Client

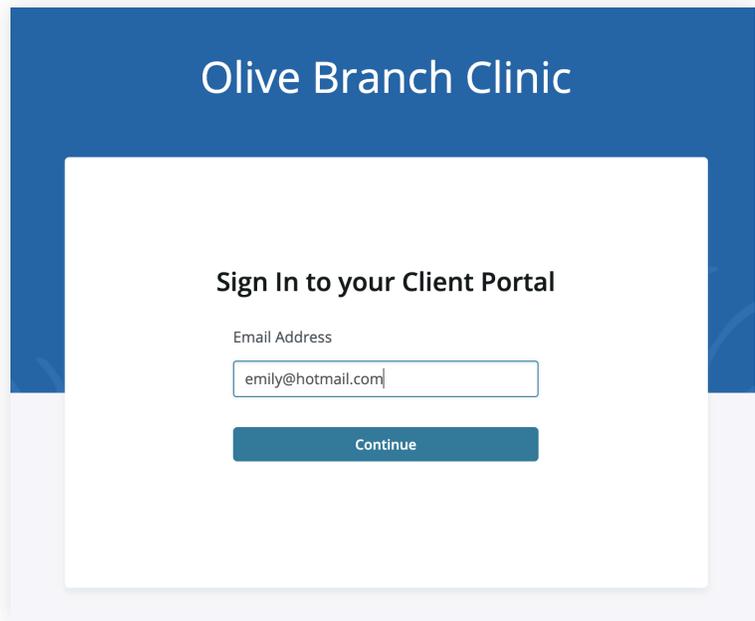


To log back in:

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 log into your Client Portal.



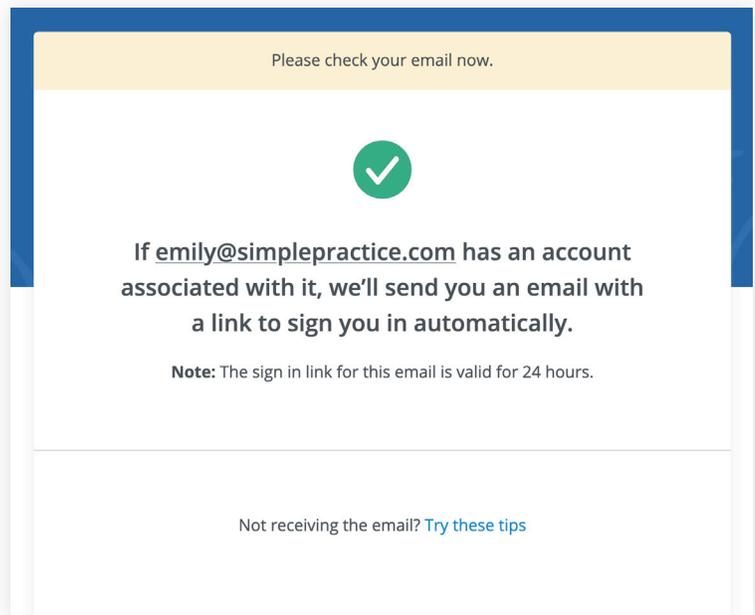
Olive Branch Clinic

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.

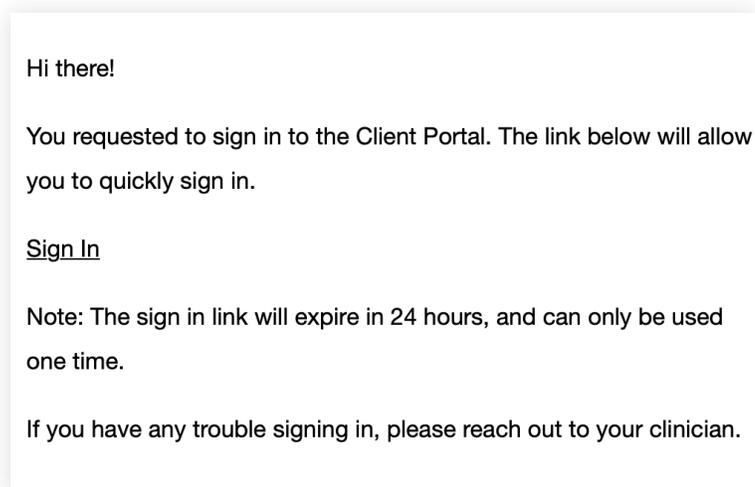


If emily@simplepractice.com has an account associated with it, we'll send you an email with a link to sign you in automatically.

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.

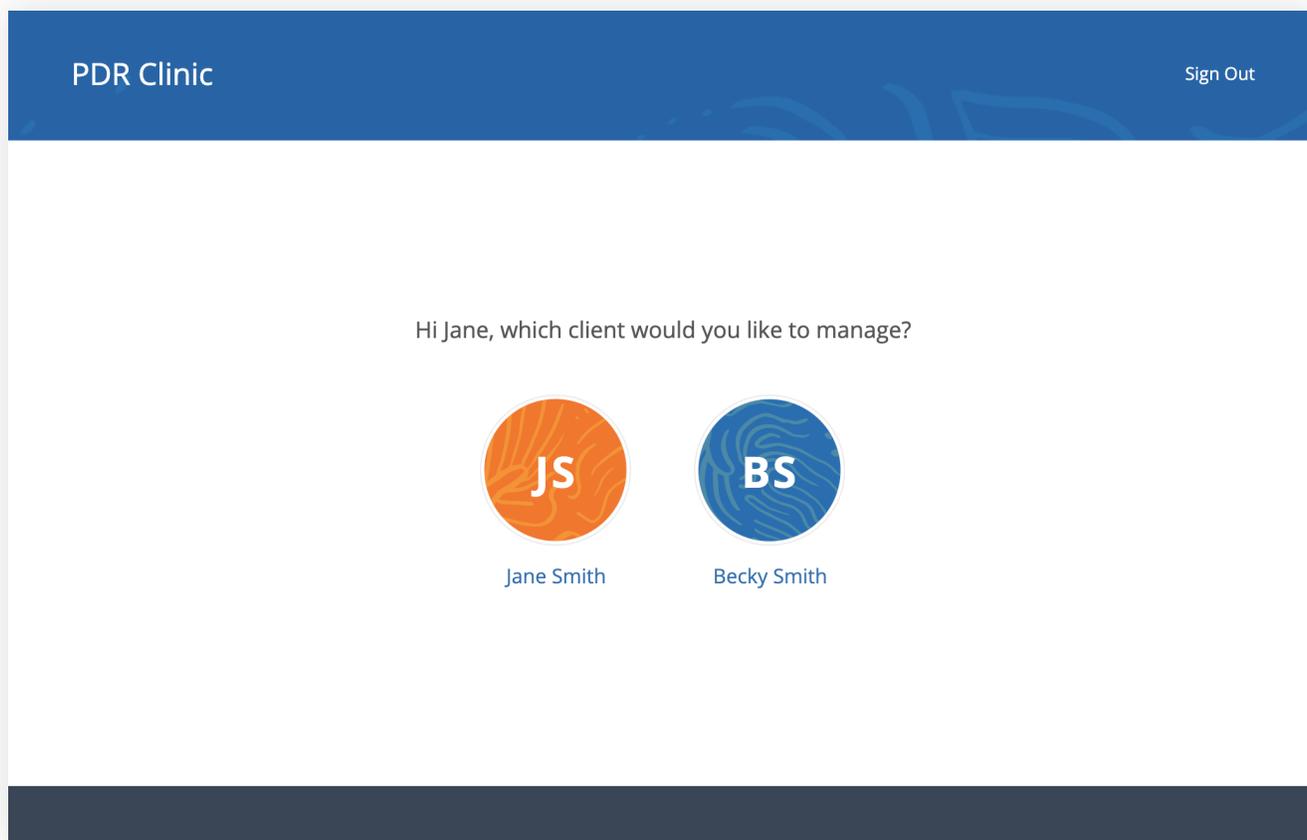
[Sign In](#)

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 your clinician is seeing both you and a minor client(s) you're the guardian for, they can give you Client Portal access for both profiles. If that's the case, you'll see multiple icons upon logging in so you can select the profile you want to manage.



TROUBLESHOOTING

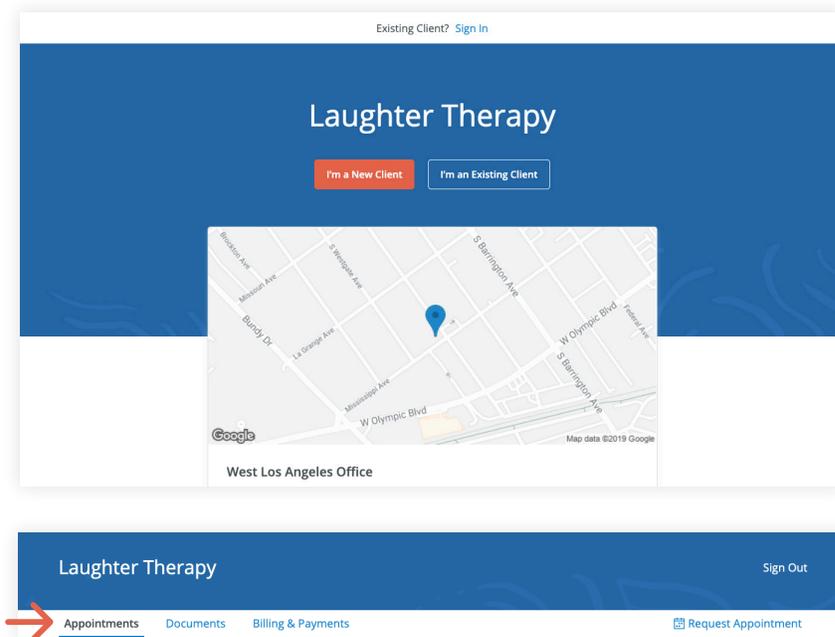
1. Check your **spam folder** and any other folders in your inbox for an email from the address `no-reply@simplepractice.com`. You can also add this address to your address book to make delivery easier.
2. Be mindful of any **auto-fillers** enabled in your browser that might be entering information for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

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.

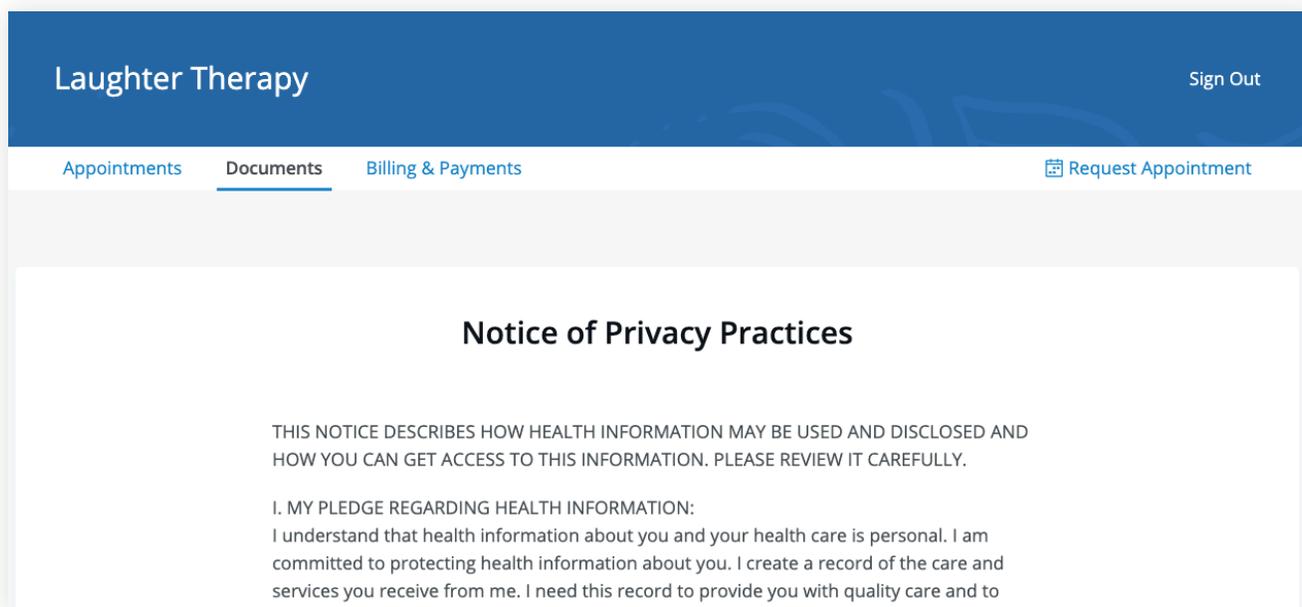
To request appointments through the Client Portal:

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 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 contains two sections: 'Needs to be completed' and 'Completed'. Each section has a table listing documents with their respective completion 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. It features a large dashed box for uploading files, with a document icon and the text 'Upload Files or drop files here'. Below this, it specifies supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. At the bottom, 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.