

The Client Portal

with  simplepractice

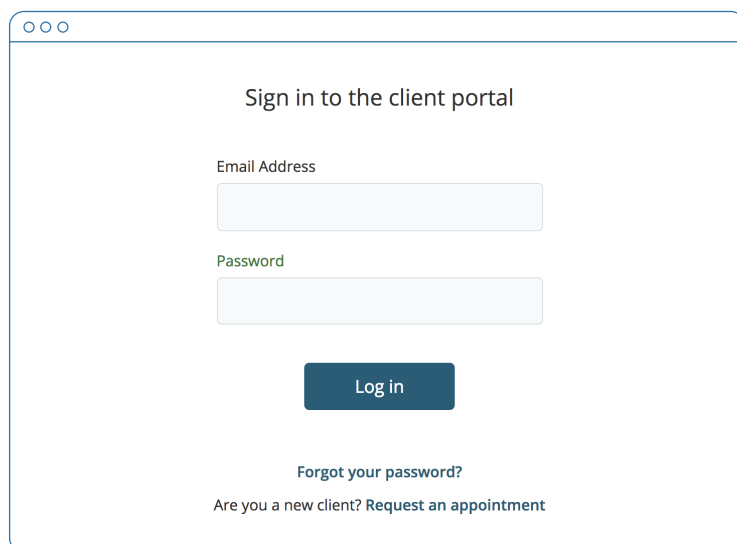
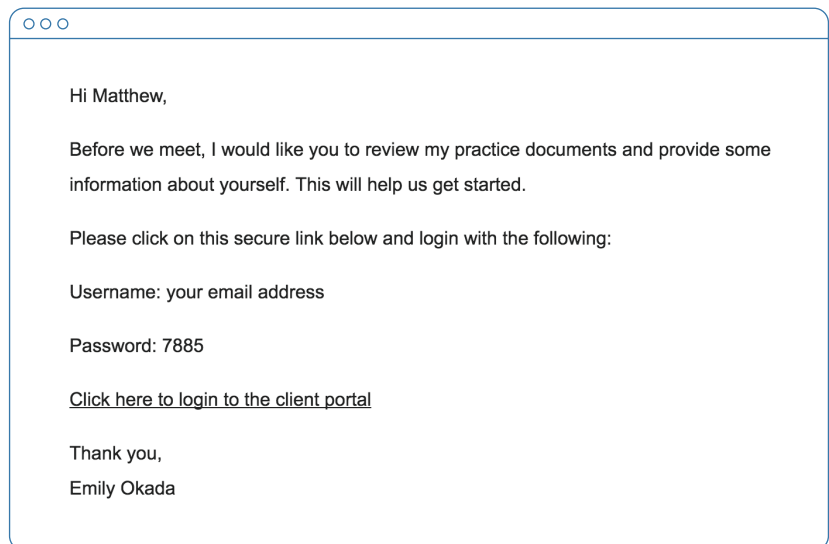
The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your session fees.

SECTIONS:

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

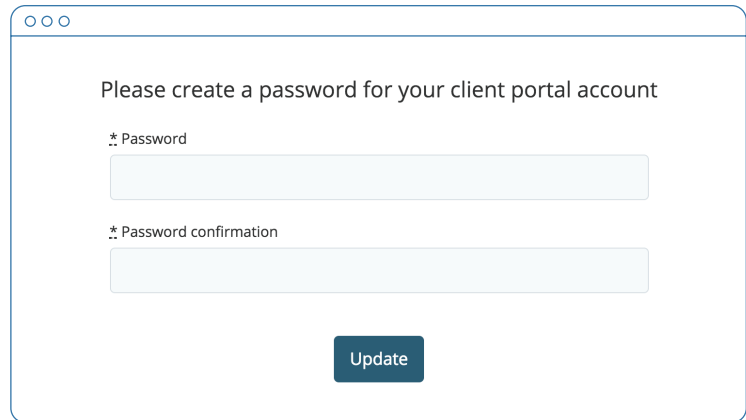
1. How do I log in?

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



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

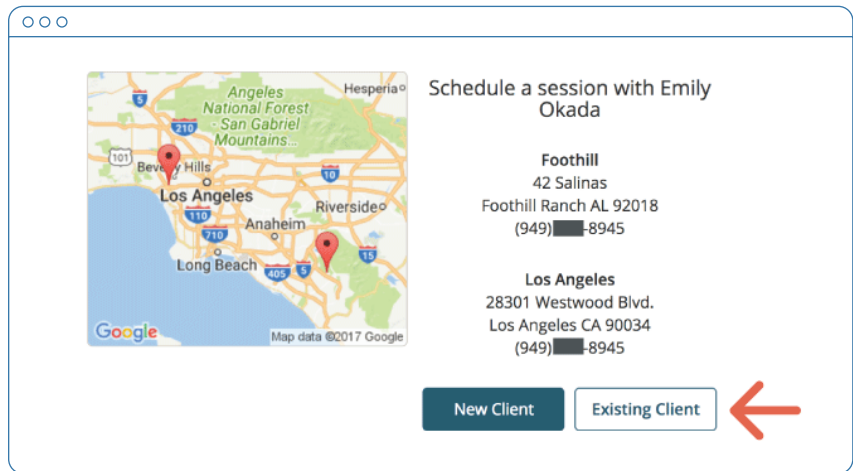
3. Online Booking

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**.