simplepractice

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# 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?

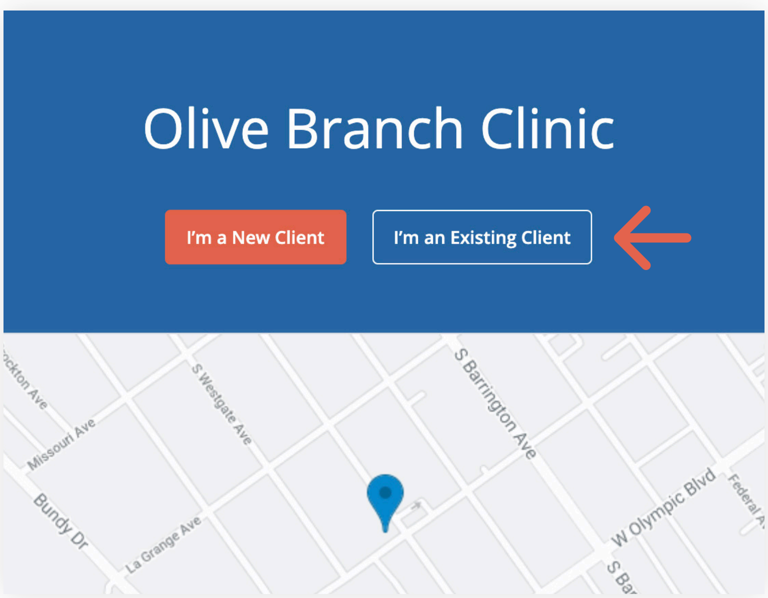
Before logging into the Client Portal for the first time, you'll receive a welcome email from your clinician. By clicking the link, you'll automatically be logged in.

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

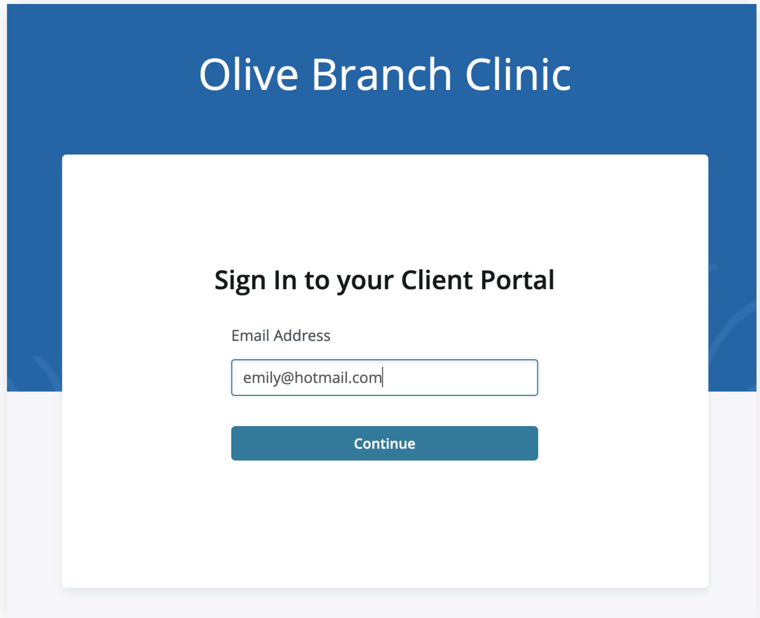



To log back in:

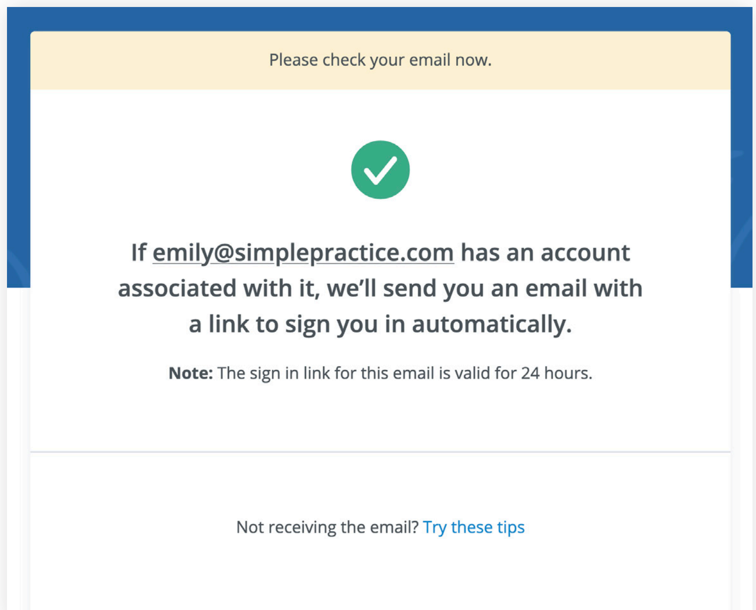
1. Go to your clinician's **Client Portal website**.
2. Click the **"I'm an Existing Client"** button.

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

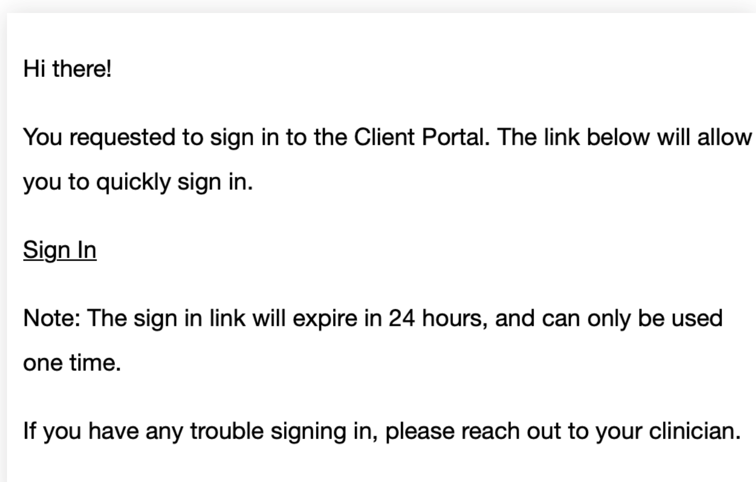
3. Enter the **email address associated with your account**. You'll receive an **email with a link** to get into your Client Portal.




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.

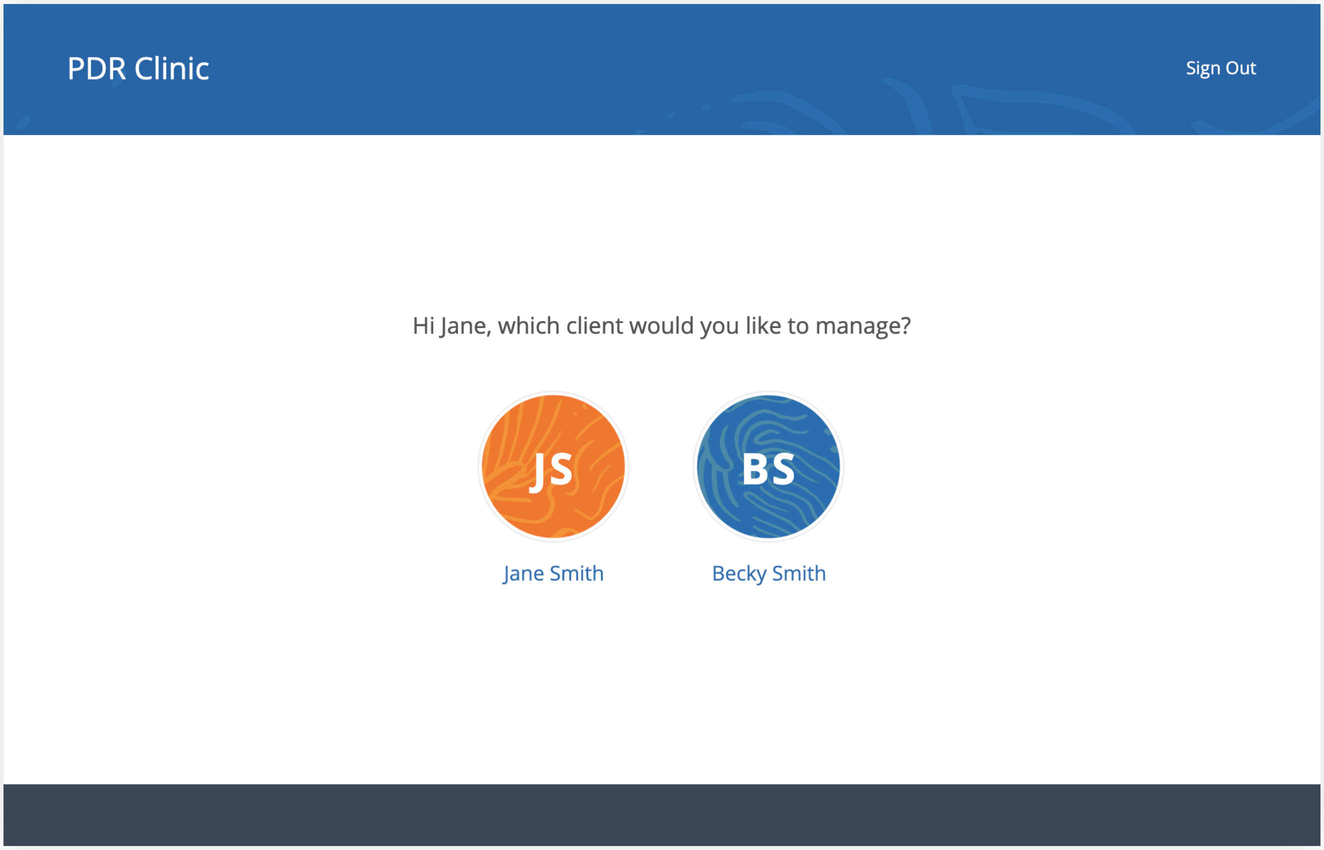



5. Click the **"Sign In"** link from the email to automatically log into your Client Portal. It expires after 24 hours and can only be used to log in one time.



## MINORS MANAGEMENT

If you are the guardian of a minor(s), and your clinician has given you access to their Client Portal (as well as your own), you will see icons after you log in. **Click on 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. It also helps to 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, this will cause it to appear as inaccurate.
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 exact.
4. The same email can't be used for more than one portal account for the same clinician.

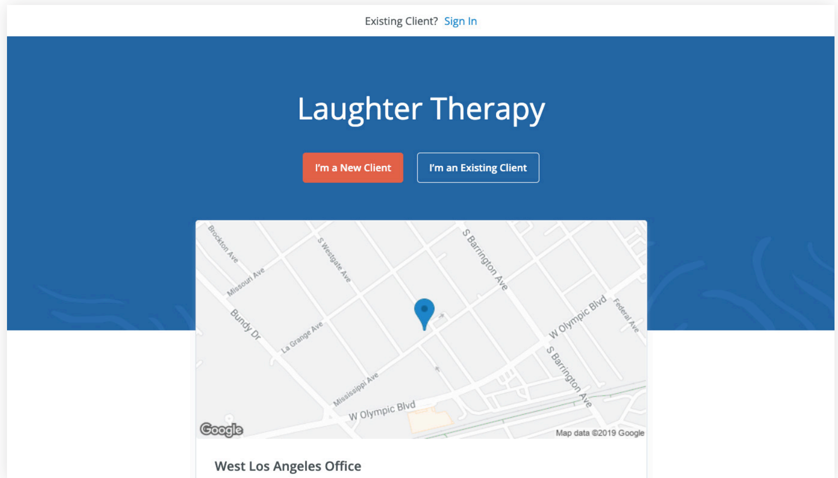
Be sure to use the same email address that you normally use to log into your Client Portal, and check your spam

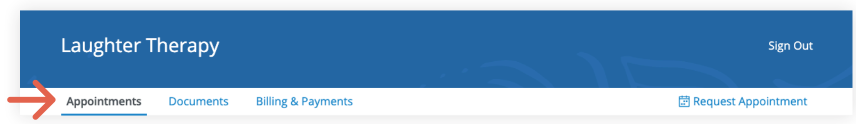
## ONLINE BOOKING

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.

The following steps will show you how to request appointments.

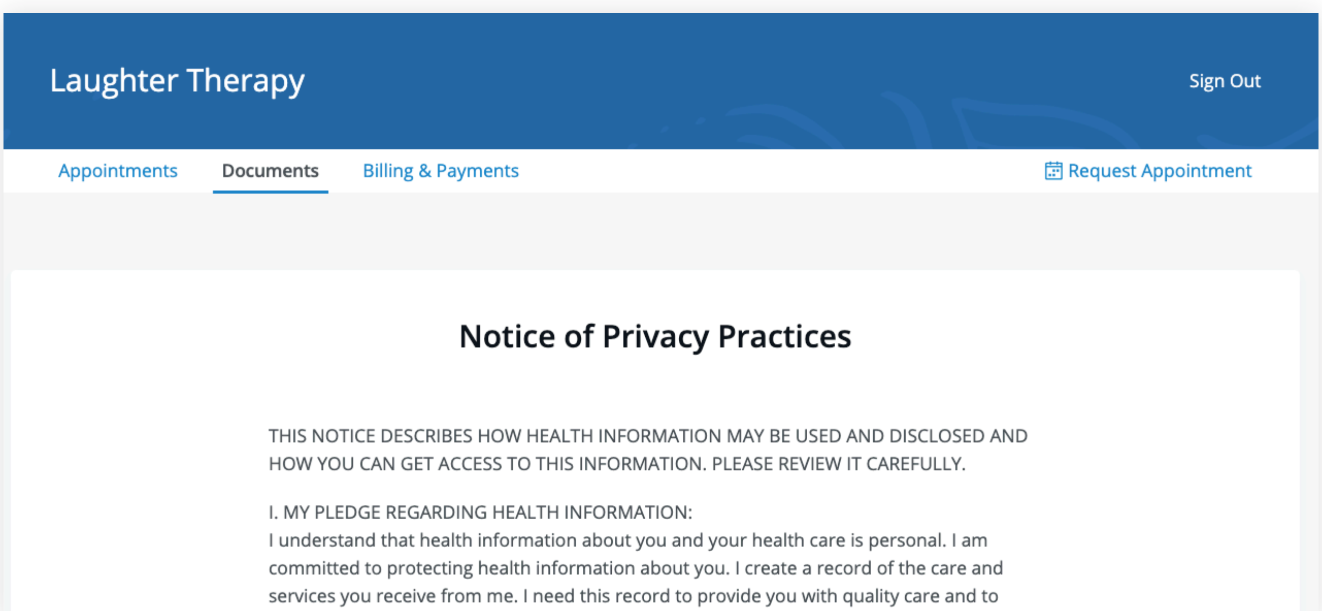
1. Go to your clinician's Client Portal and click Existing Client to log in. (The New Client button is only for clients who have never logged into the Client Portal before).
2. Navigate to the appointments tab. (This may already be selected by default after you log in).



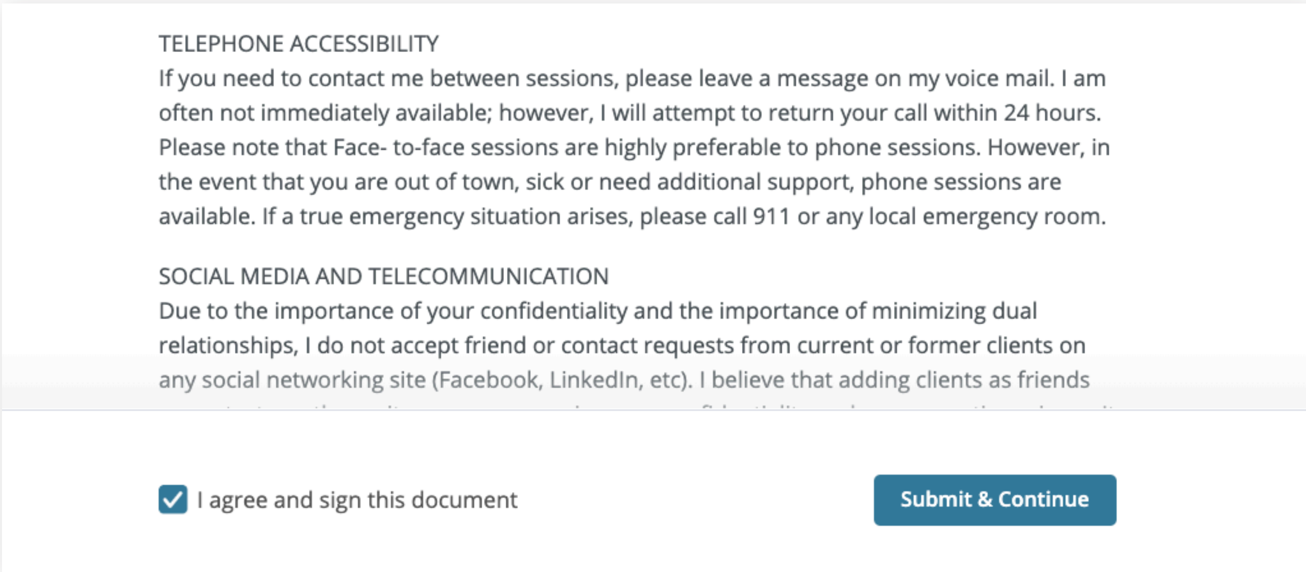




## DOCUMENTS AND FORMS

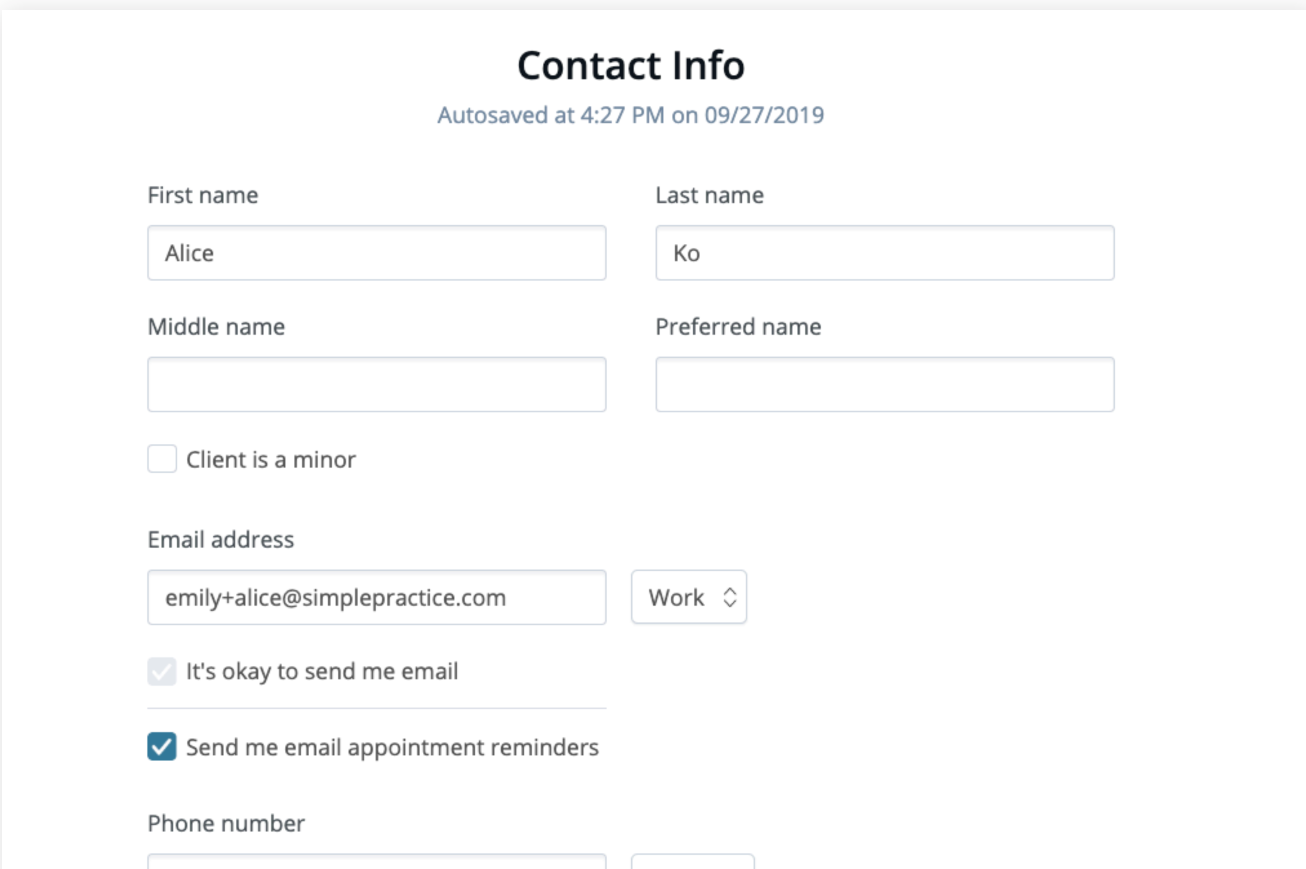
The first time you log into the Client Portal, you'll see a welcome message from your clinician. After you click **Get Started**, you'll start filling out forms from your clinician.



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.

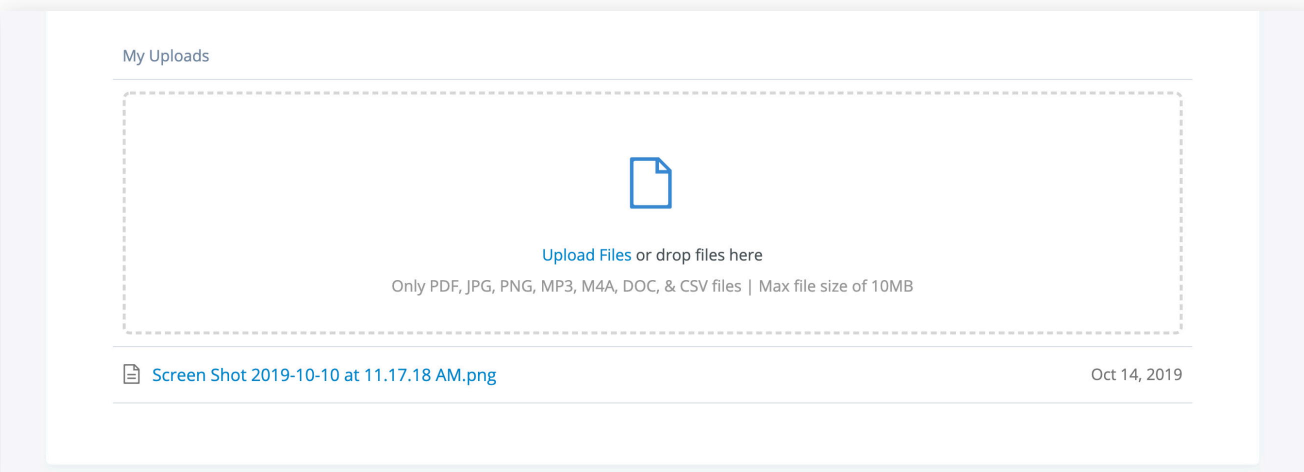



After signing documents, you may be asked to fill out your contact details, demographics, credit card, and insurance information.



To view your completed documents at any time, navigate to the **Documents** tab.


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.




## Congratulations!

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