



# 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?

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.

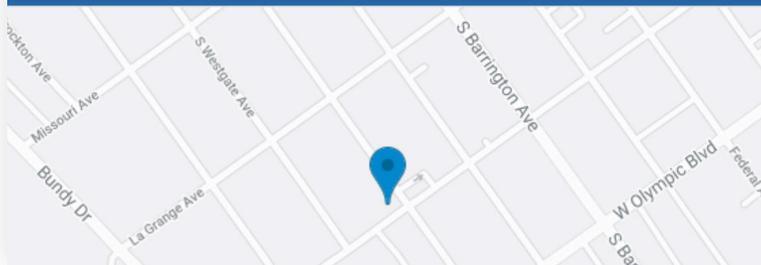
Thank you!

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

## Olive Branch Clinic

I'm a New Client

I'm an Existing Client

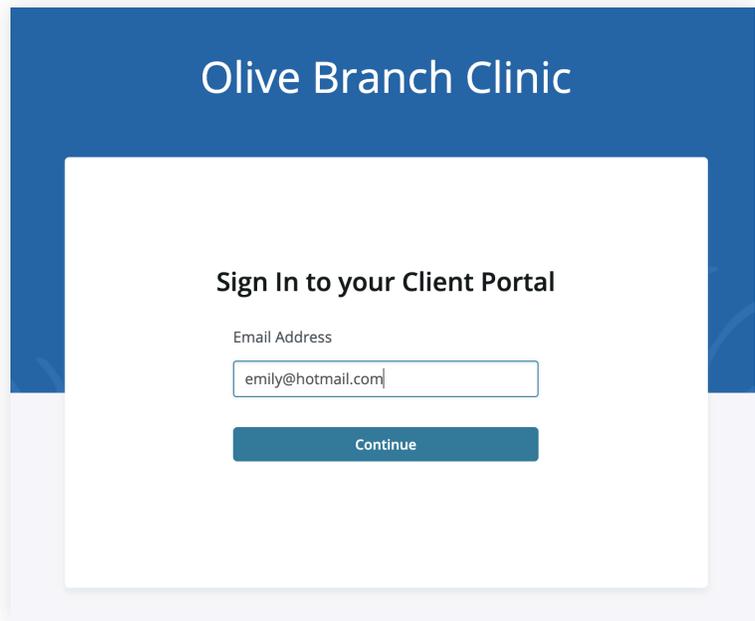


To log back in:

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 get into your Client Portal.



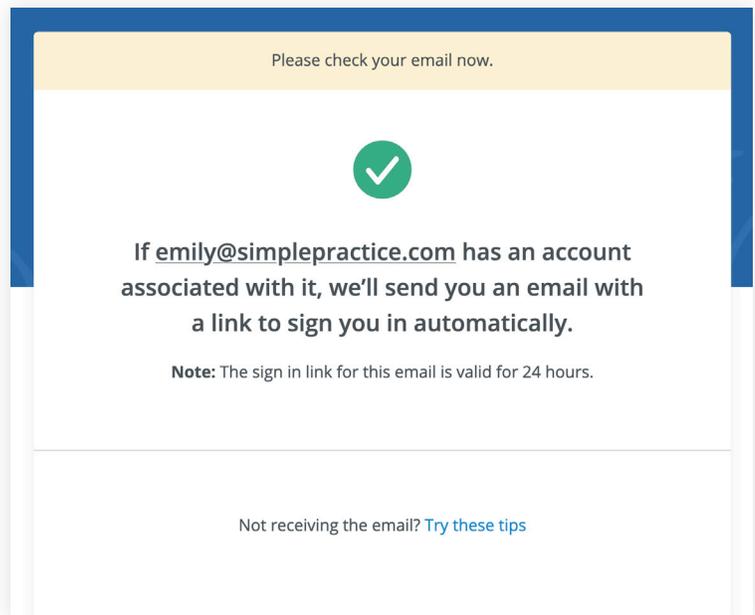
Olive Branch Clinic

### 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.

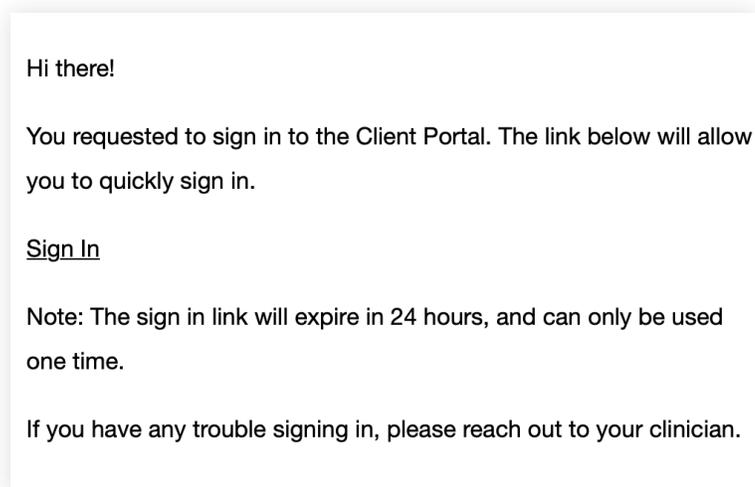


If [emily@simplepractice.com](mailto:emily@simplepractice.com) has an account associated with it, we'll send you an email with a link to sign you in automatically.

**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.

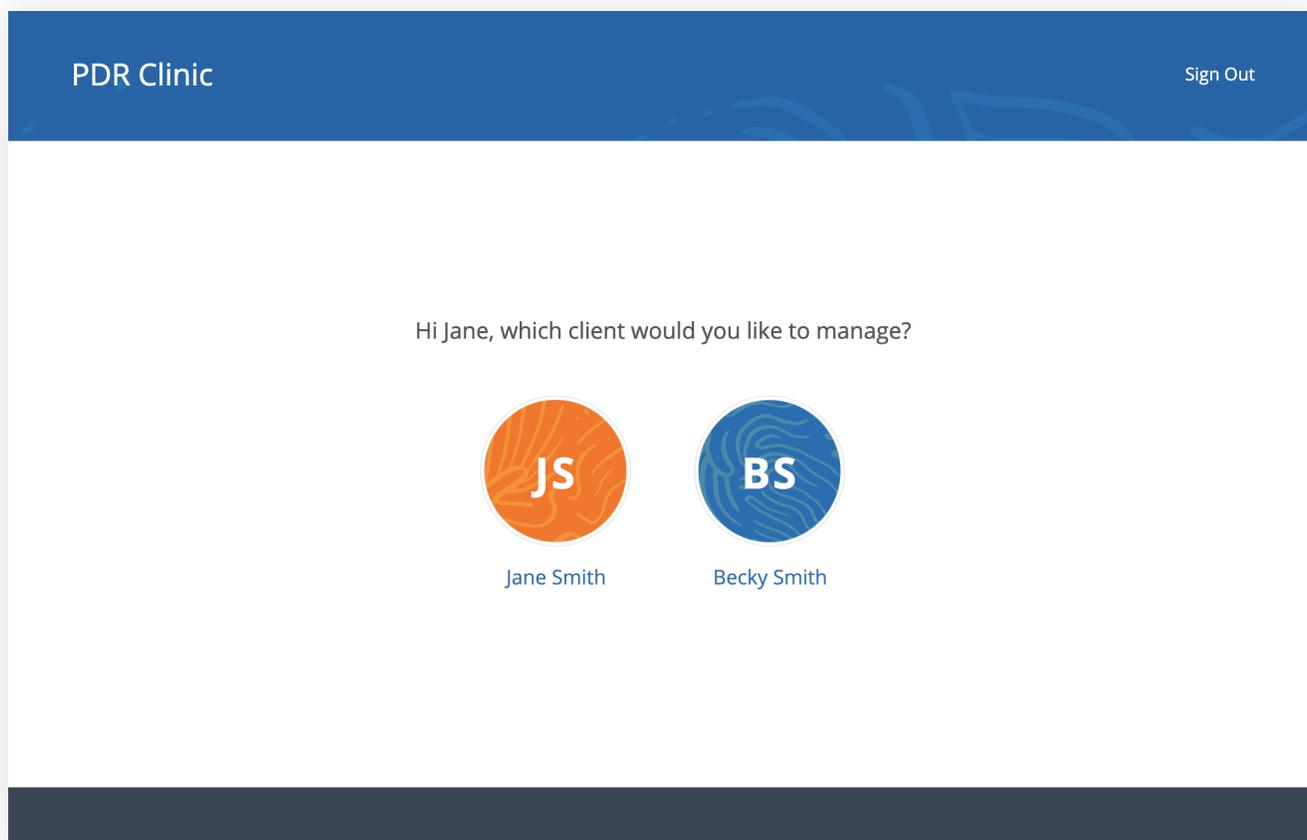
[Sign In](#)

**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 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

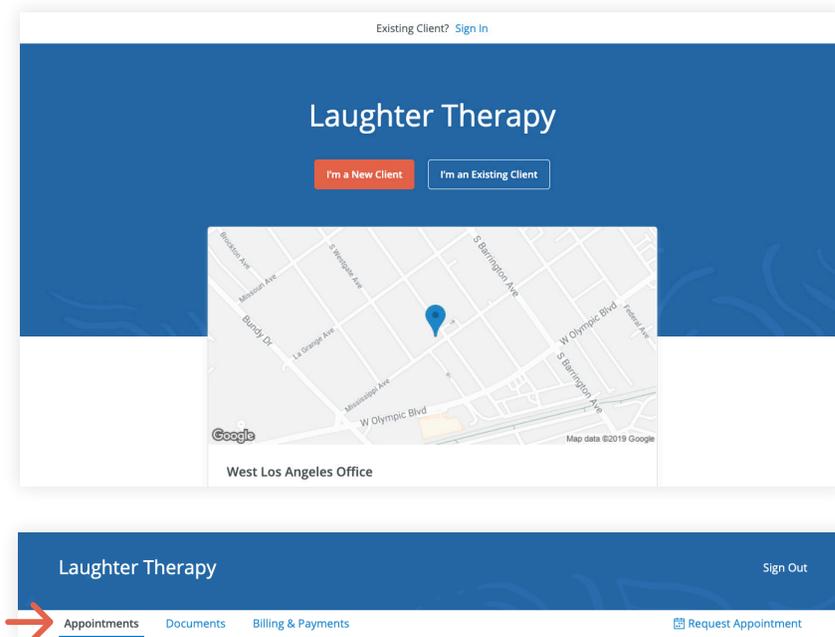
1. Check your **spam folder** and any other folders in your inbox for an email from the address `no-reply@simplepractice.com`. It also helps to add this address to your address book to make delivery easier.
2. Be mindful of any **auto-fillers** enabled in your browser that might be entering information 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.

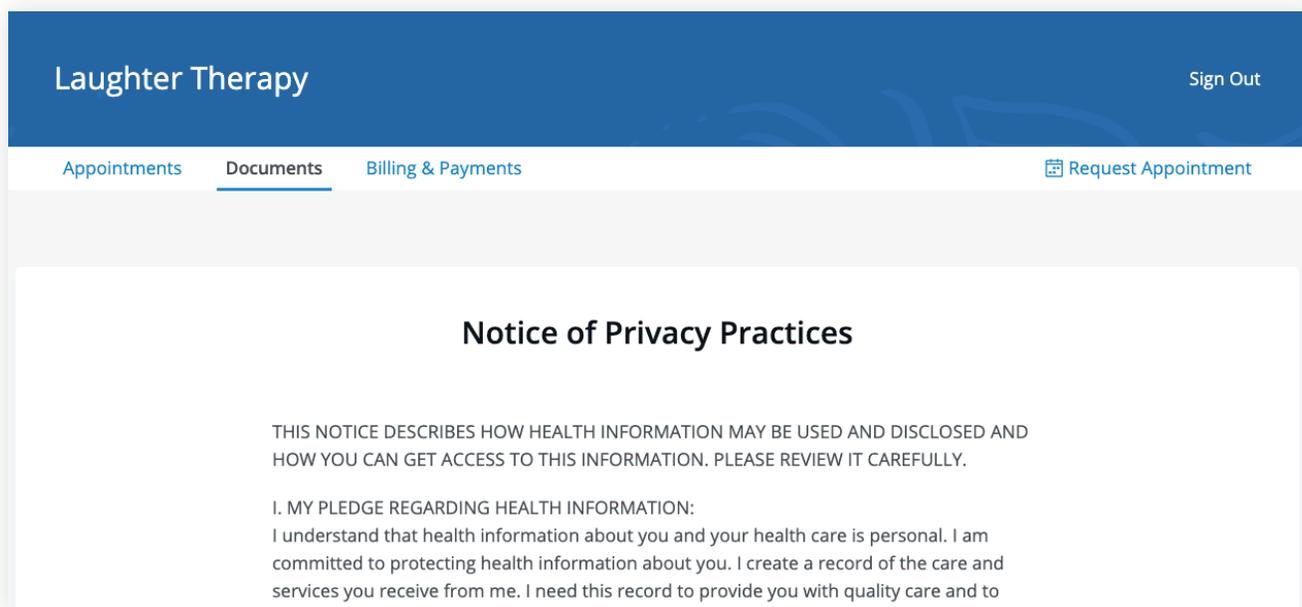
The following steps will show you how to request appointments.

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.

#### 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

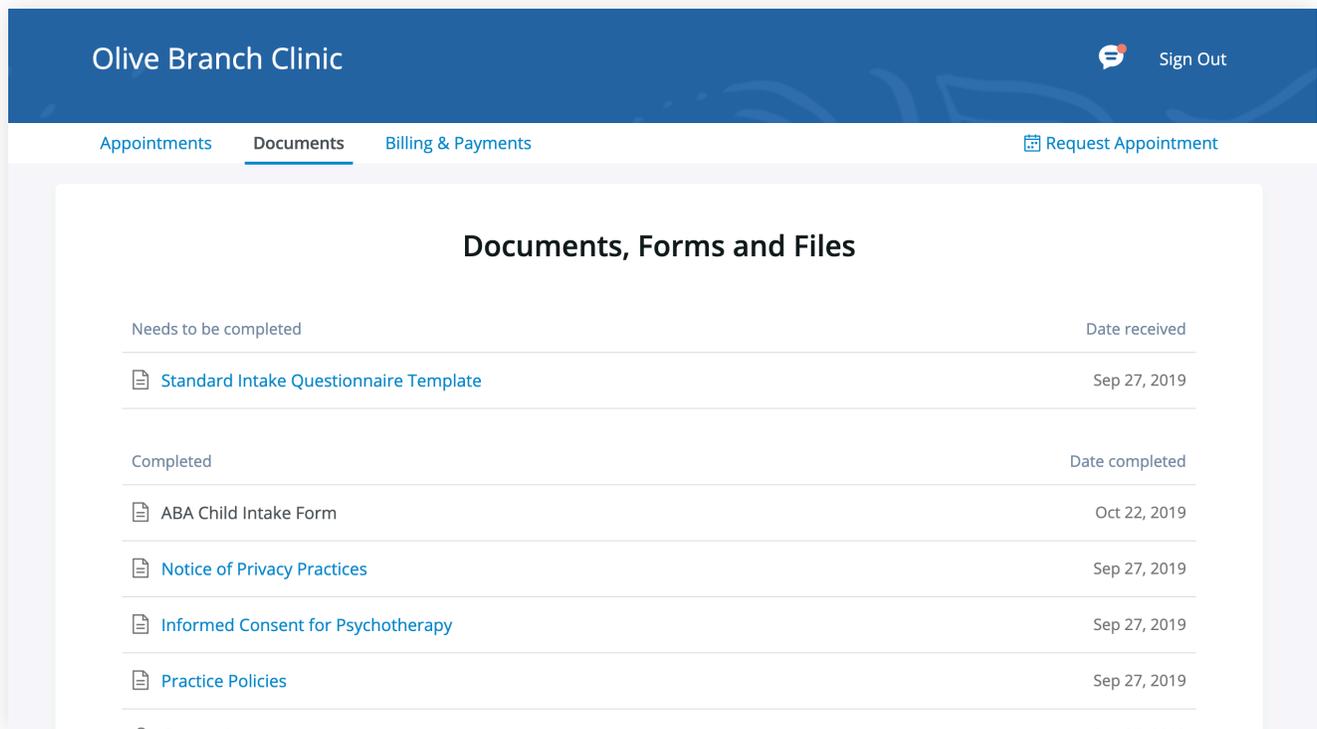
Send me email appointment reminders

Phone number

(949) 306-8945

Work 

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



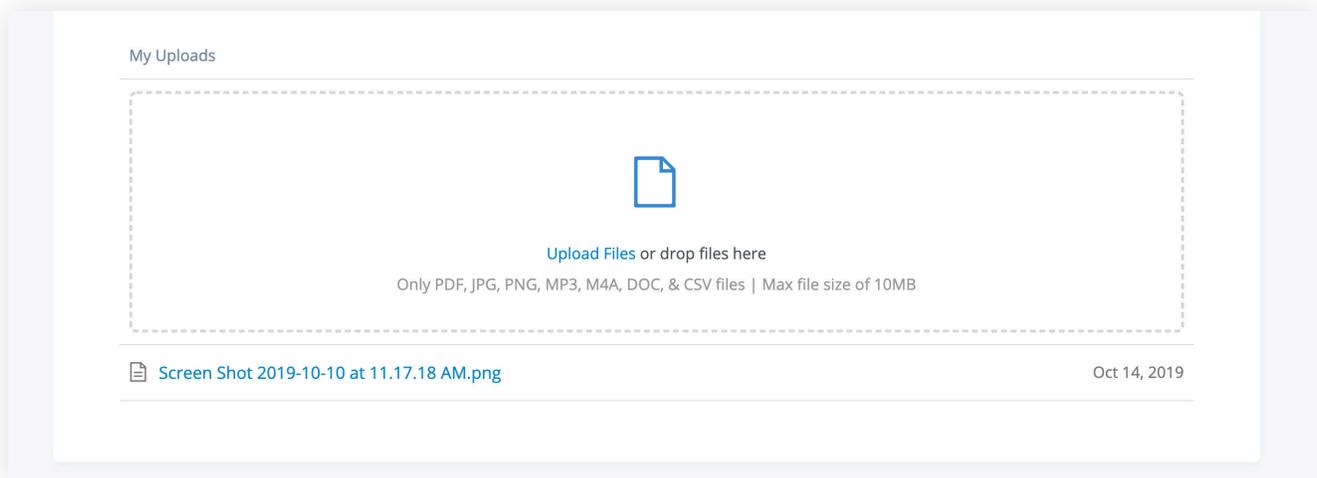
The screenshot shows the Olive Branch Clinic client portal. The top navigation bar includes the clinic name, a chat icon, and a 'Sign Out' button. Below the navigation bar are tabs for 'Appointments', 'Documents' (which is selected), and 'Billing & Payments'. A 'Request Appointment' button is also visible. 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 with document names and dates.

Needs to be completed	Date received
 <a href="#">Standard Intake Questionnaire Template</a>	Sep 27, 2019

Completed	Date completed
 <a href="#">ABA Child Intake Form</a>	Oct 22, 2019
 <a href="#">Notice of Privacy Practices</a>	Sep 27, 2019
 <a href="#">Informed Consent for Psychotherapy</a>	Sep 27, 2019
 <a href="#">Practice Policies</a>	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 file uploads with a document icon in the center. Below the box, it says 'Upload Files or drop files here' and lists supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. Below this is a table showing an uploaded file.

My Uploads	
 <a href="#">Screen Shot 2019-10-10 at 11.17.18 AM.png</a>	Oct 14, 2019



**Congratulations!**

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