

Great News! Now there is an iOS Client Portal app for Simple Practice that is free in the Apple App Store!
Simple Practice is currently working on the Android version

Please check this out if you are interested in making Simple Practice use more convenient!

Minimum requirements for the client app

The SimplePractice Client Portal app requires an iPhone with **iOS 13.0 or later**. The app is not compatible with iPads. While our team is actively working to develop an Android app, we don't have an ETA for this.

Note: Clients and contacts can access the web version of the Client Portal on the mobile browser of their iPad or Android device.

Downloading the client app

The SimplePractice Client Portal mobile app is available for clients and contacts to download on the **App Store**. To download the app:

- Open the App Store on their iPhone
- Search for "SimplePractice Client Portal"
- Tap **Get**

They can also tap the **Download on the App Store** badge in the footer of the automated Client Portal emails they receive:

Note: This update to Client Portal emails is being rolled out in phases. You'll be notified when the **Download on the App Store** badge has been added to your practice's automated Client Portal emails.

Login process

Note: In order to use the app, Clients and contacts must have Client Portal access enabled. To learn more, see [Inviting clients to the Client Portal](#).

After downloading the app, clients and contacts can request a sign-in link, in a process similar to **Instant Sign In** on the web version of the Client Portal. To do this, they can:

- Open the **SimplePractice Client Portal mobile app**
- Enter the email address that's associated with their Client Portal access
 - This is the email address you have listed under **Client Portal Access** on their **Overview** page > **Edit** > **Client Portal** tab
- Tap **Send link**

simplepractice

Client Portal

Enter your email address to sign in

SEND LINK



By logging in, you agree to the SimplePractice
Client Portal [Privacy Policy](#) and [Terms of Service](#)

- Select **Go to email** and check their email for a one-time sign-in link
- From the email, tap **Sign In**



Sign in to your Client Portal –
09/20/2022, 4:56:32 pm (PDT)



Inbox

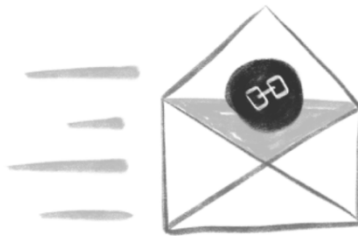


Client Portal 4:56 PM



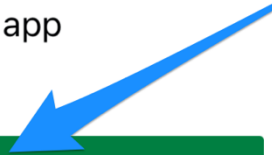
to me ▾

IMPORTANT: This is an automated message. Please do not reply. For any questions please contact your provider.



Here's the link you
recently requested

Sign in to the secure SimplePractice
Client Portal app



SIGN IN

-
- **Tip:** If clients don't see this email in their inbox, they can search for an email from **yourprovider@simplepractice.com** in their Spam, Bulk Mail, and/or Updates folders

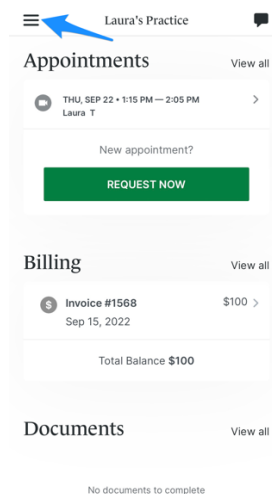
Once they've signed in, clients can enable Face ID, Touch ID, or a four-digit passcode for an easier, secure login experience.

Note: When clients and contacts sign in to the app for the first time, they'll be prompted to accept an **End User License Agreement** (EULA). If they've already acknowledged this agreement on the web version of the Client Portal, they won't need to accept it again.

App security

Clients and contacts can expect the same level of security on the mobile app as on the web version of the Client Portal. They can also use their iPhone's built-in security features to securely and conveniently access the app. To enable a passcode, Face ID, or Touch ID, they can:

- Tap the three stacked lines in the top left



- Select **App security**

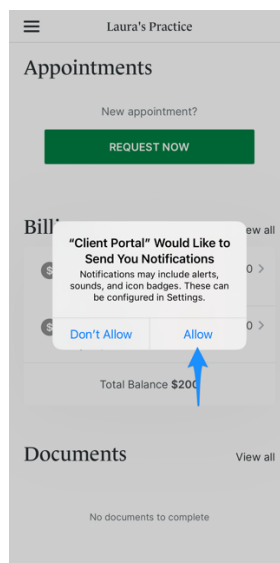
From here, clients can set a passcode and turn on Face ID or Touch ID.

Note: Clients will only see the option to enable Face ID/Touch ID if this feature is already set up on their iPhone. For guidance on this process, they can refer to Apple's guides on [Using Face ID](#) and [Using Touch ID](#).

To fully log out of the app, clients can tap the three stacked lines and select **Sign out**. Because we don't store app preferences, signing out of the app will reset their security and notification settings.

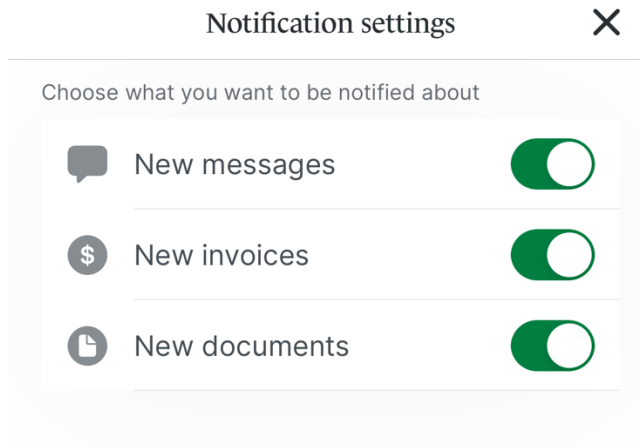
Push notifications

Clients can opt to receive push notifications when you send them a new message, invoice, or document. When they log in to the app, they'll be asked to allow notifications:



To change the types of notifications they receive or turn notifications off altogether, clients can:

- Tap the three stacked lines in the upper left
- Select **Notification settings**
- Choose which notifications they'd like to receive



New message

Clients will be notified when they receive a new [Secure Message](#). If the message remains unread, they'll also receive an email notification 10-20 minutes later.

New invoice

Clients will receive push notifications when new invoices are manually or automatically emailed, not when they're created. To learn how to manually email an invoice or how to automate this process, see [How to share billing documents with clients](#).

Note: You can adjust a client's **Email Billing Notification** settings from their **Overview** page > **Edit** > **Billing and Insurance** tab.

New document

Clients will be notified when a new document is shared with them. See [Sending intake forms and documents to clients](#) to learn more.

Navigating the dashboard

Note: Clients and contacts will only have access to the features you've enabled on a practice-wide and individual level. For more information on enabling and disabling Client Portal features, see [Setting up the Client Portal](#).

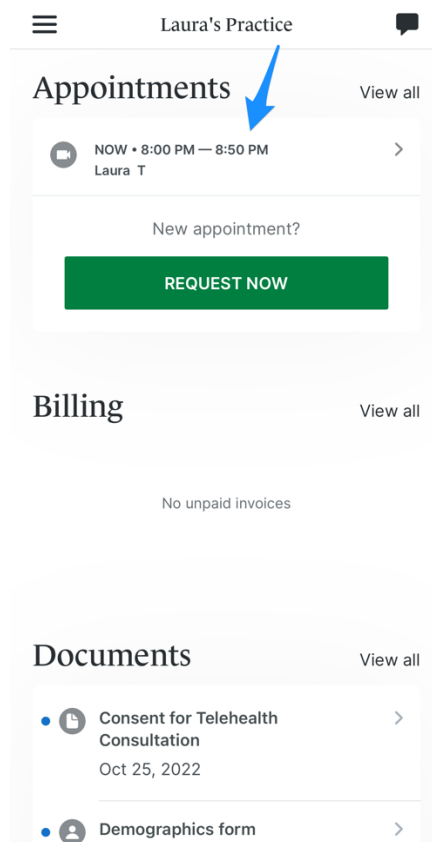
Clients and contacts can manage appointments, view and pay invoices, view pending documents, and communicate with you via Secure Message from the app's dashboard.

Appointments

In the **Appointments** section, clients can see details of their upcoming appointments. If you have **online appointment requests** enabled, they'll be able to request new appointments.

Clients can also start a **Telehealth** appointment directly from the app. To do this, they can:

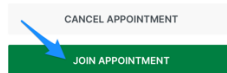
- Select the appointment



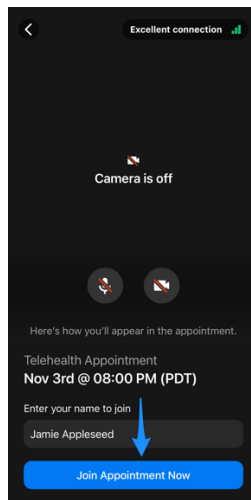
- Tap **Join Appointment**



NOW • 8:00 PM — 8:50 PM
Laura T
Telehealth Appointment



- Enter their name
- Tap **Join Appointment Now**



Billing

Here, clients can view invoices and make payments, if [Online Payments](#) are enabled.

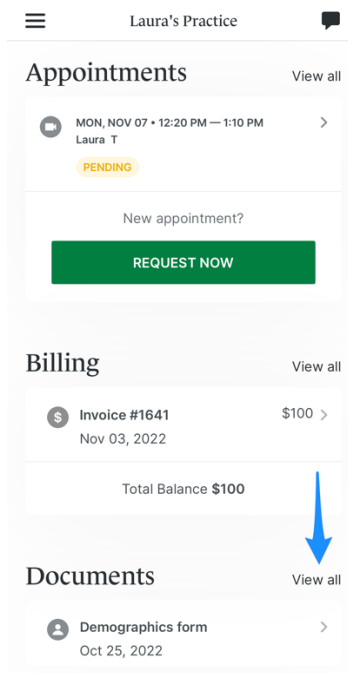
Documents

Under **Documents**, clients will see a list of their pending documents. To complete a document, they can:

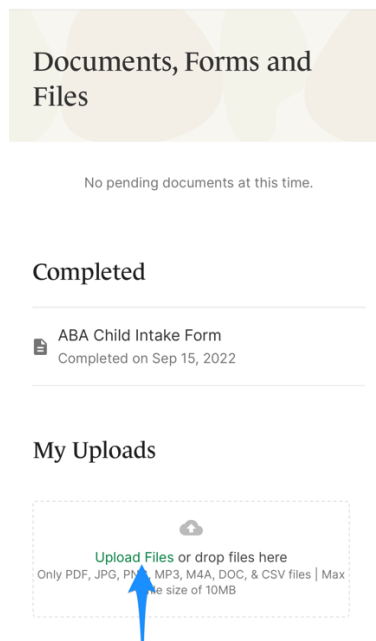
- Select the document
 - The document will open in a new tab on their iPhone's mobile browser
- Follow the prompts to complete and submit each form

While clients can't upload files directly into the app, they can do so on their mobile browser:

- In the **Documents** section, tap **View all**



- Under **My Uploads**, select **Upload Files**

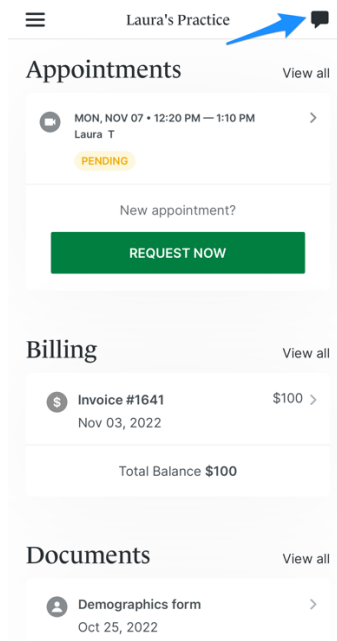


- Select an item from their **Photo Library**, take a photo or video, or choose a file

Note: To learn how to enable document uploads for the Client Portal, see [Allowing clients to upload documents to the Client Portal](#).

Secure Messages

Clients and contacts can also send and receive **Secure Messages** in the app. They can tap the chat bubble icon in the top right to access Secure Messaging:



Accessing the SimplePractice Client Help Center

As part of our continued efforts to streamline your clients' care experience, we've created a new **SimplePractice Client Help Center**. Here, clients can find resources that will help them get started with the Client Portal, Telehealth, and the mobile app.

To access the SimplePractice Client Help Center, they can:

- Tap the three stacked lines in the top left
- Select **Help center**