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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?

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

IM A NEW CLIENT

IM AN EXISTING CLIENT

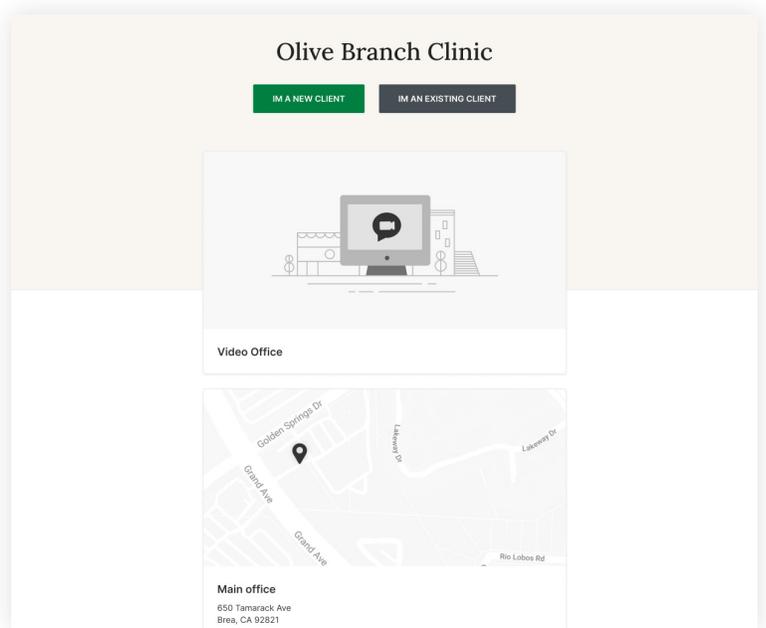


To log back in:

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

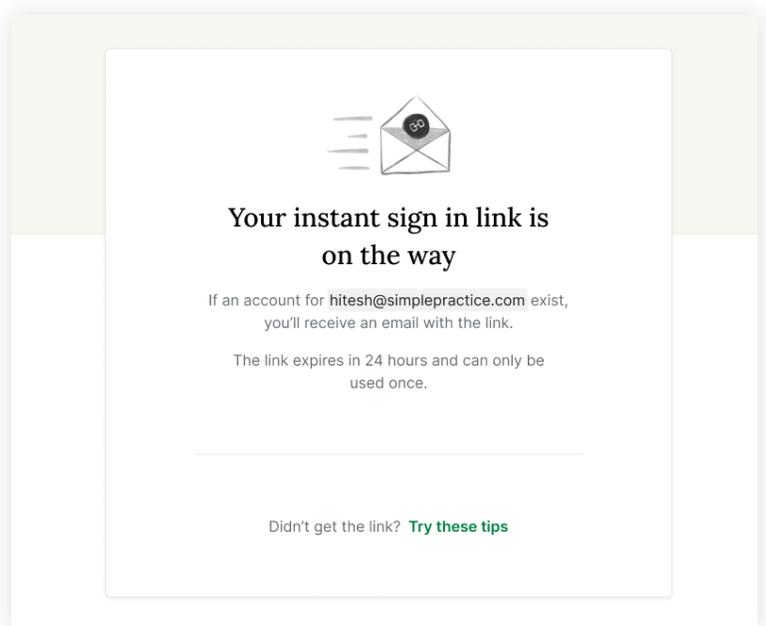
**Tip:** Bookmark this page so you can log back in easily in the future.

3. Enter the **email address** associated with your account. Click **Email Me a Link**.



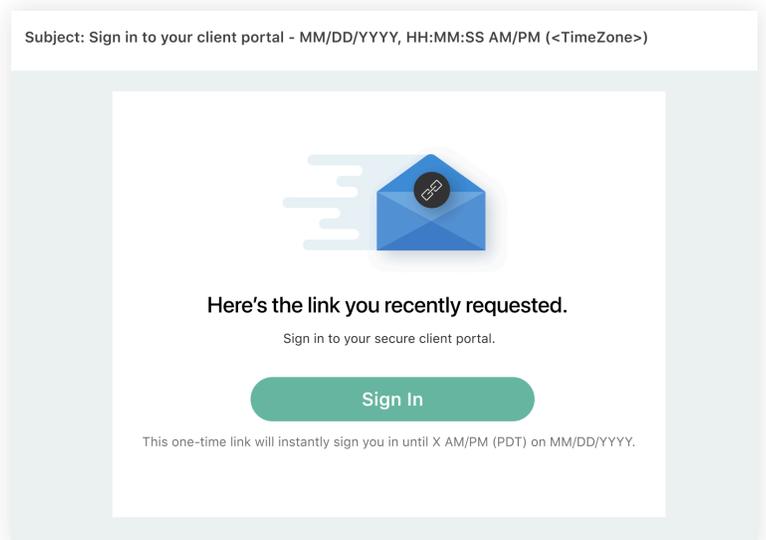
4. Check your inbox to find the sign-in email. Keep in mind that the link in the email is valid for 24 hours and can **only** be used to sign in once.

**Note:** If you don't see the sign-in email in your inbox, click **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.

**Important:** You must use the most recent Sign In link in your inbox. If you requested a Sign In link multiple times and click an older link when a newer one exists, you will not be able to sign into the Client Portal.



## MANAGING MULTIPLE PROFILES

If you're seeing your provider individually and for couple appointments, or if you have minor client(s) that you're responsible for, you may have multiple client portal profiles. If that's the case, you'll see multiple icons upon signing in to the client portal. Simply select the profile that you want to manage.

### Which profile would you like to manage?



## TROUBLESHOOTING SIGN-IN ISSUES

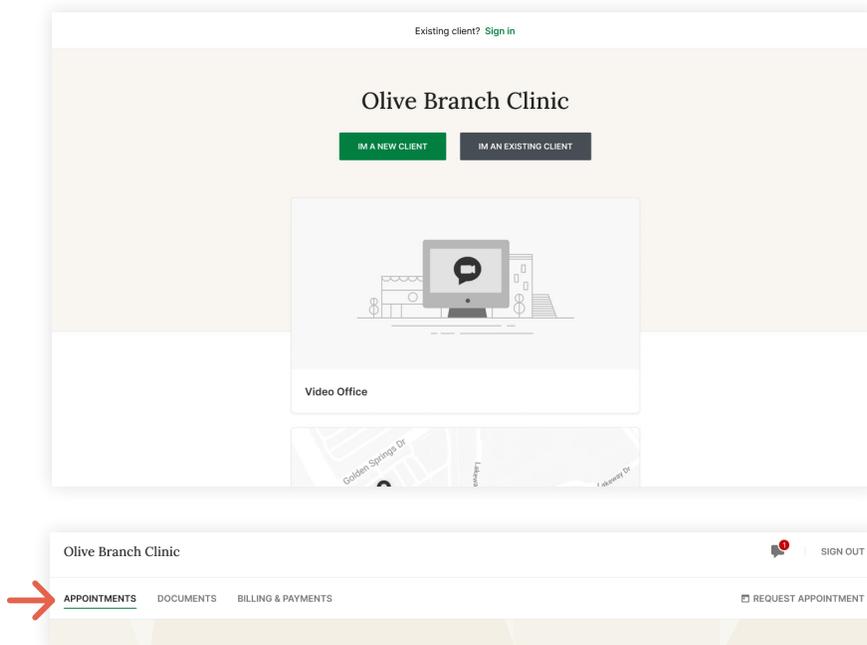
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from [no-reply@simplepractice.com](mailto:no-reply@simplepractice.com). Add this address as a contact to make sure you get these emails in the future.
3. Call your provider's office and **request a pin code** to sign in. Your provider can give you a 6-digit pin code that you can use along with your email address to sign in. Call the number that you see on the page, request the pin code, and make sure to confirm your account email address while you're on the call. Once you have the pin code ready, click **Sign in via Pin code**, enter the code, and click **Sign In**.

## 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.

The screenshot shows the "Contact information" form in the Olive Branch Clinic Client Portal. The page header includes "Olive Branch Clinic" and "SIGN OUT". The navigation bar shows "APPOINTMENTS", "DOCUMENTS" (underlined), and "BILLING & PAYMENTS". A green "REQUEST APPOINTMENT" button is visible on the right. The main heading is "Contact information" with a subtext "Autosaved at 1:45 AM on 08/10/2021". Under the heading "General info", there is a note: "We use this information to understand who you are". The form contains three input fields: "First name" with the value "Hitesh", "Last name" with the value "Solanki", and "Email address" which is currently empty.

Some documents can be signed electronically by clicking **Sign here** at the bottom of the page.

your privacy. However, if you acknowledge me first, I will be more than happy to speak briefly with you, but feel it appropriate not to engage in any lengthy discussions in public or outside of the therapy office.

BY CLICKING ON THE CHECKBOX BELOW I AM AGREEING THAT I HAVE READ, UNDERSTOOD AND AGREE TO THE ITEMS CONTAINED IN THIS DOCUMENT.



**Sign here**

By adding your signature, you are eSigning this form

Submit & Continue

Enter your name and your relationship to the client, and click **Save Changes**.

Suspicious as stated above in the case of an elderly person who may be subjected to these abuses.

Suspected neglect of the parties named in items #3 and # 4.

If a court of law issues a legitimate subpoena for information stated on the subpoena.

### Create Your Signature



Your Name

Isabella Jones

Preview

Signed by Isabella Jones

Client

March 1, 2021 1:30 PM

Relationship to Client

Client

Updating your information here will be applied to all future signatures.

Cancel

Save Changes

Submit & Continue

Then, click **Submit & Continue** to move to the next document.

If a court of law issues a legitimate subpoena for information stated on the subpoena.

If a client is in therapy or being treated by order of a court of law, or if information is obtained for the purpose of rendering an expert's report to an attorney.

Occasionally I may need to consult with other professionals in their areas of expertise in order to provide the best treatment for you. Information about you may be shared in this context without using your name.

If we see each other accidentally outside of the therapy office, I will not acknowledge you first. Your right to privacy and confidentiality is of the utmost importance to me, and I do not wish to jeopardize your privacy. However, if you acknowledge me first, I will be more than happy to speak briefly with you, but feel it appropriate not to engage in any lengthy discussions in public or outside of the therapy office.

BY CLICKING ON THE CHECKBOX BELOW I AM AGREEING THAT I HAVE READ, UNDERSTOOD AND AGREE TO THE ITEMS CONTAINED IN THIS DOCUMENT.



Signed by Isabella Jones  
Client  
March 1, 2021 1:34 PM

**Submit & Continue**

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

To view documents that your clinician has shared with you, view the **Documents** tab.

The screenshot shows the Olive Branch Clinic client portal interface. At the top, the clinic name "Olive Branch Clinic" is on the left, and a notification icon with a red "1" and a "SIGN OUT" link are on the right. Below this is a navigation bar with "APPOINTMENTS", "DOCUMENTS" (which is underlined), and "BILLING & PAYMENTS". A green button labeled "REQUEST APPOINTMENT" is positioned to the right of the navigation bar. The main content area is titled "Documents" and is divided into two sections: "Needs to be completed" and "Completed". Each section has a "DATE RECEIVED" header. Under "Needs to be completed", there are two items: "Questionnaire" and "Credit Card Information", both with document icons and a date of "May 06, 2020". Under "Completed", there are three items: "HIPAA Form", "Consent Form Title", and "Practice Policies", all with document icons and a date of "May 06, 2020".

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 of the client portal. It features a large dashed rectangular box for file uploads. In the center of this box is a cloud upload icon. Below the icon, the text reads "Choose file or drag and drop file" in green, followed by "Optional description text area" in a smaller, grey font.



**Congratulations!**

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