



Complete Guide 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](#)

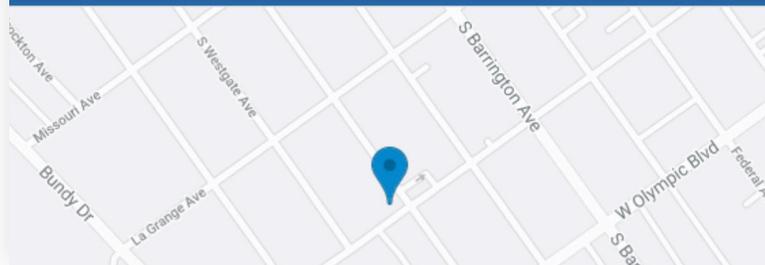
Our Group Practice is Kaafi Counseling

<https://kaaficounseling.clientsecure.me/>

Olive Branch Clinic

I'm a New Client

I'm an Existing Client

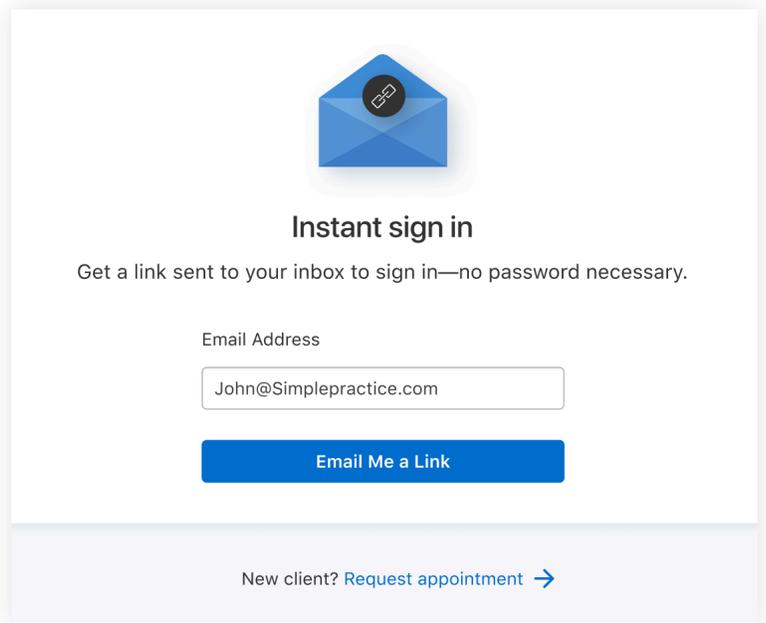


To log back in:

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.

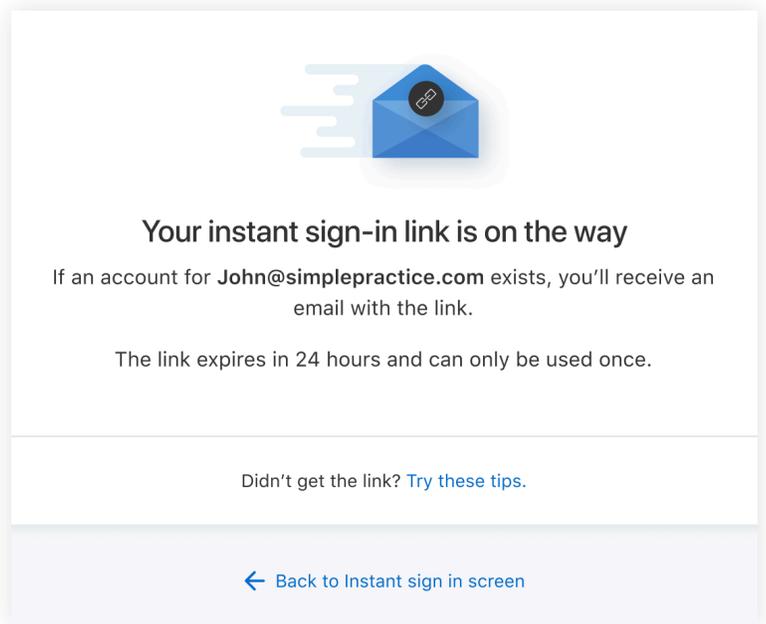
3. Enter the **email address** associated with your account. Click **Email Me a Link**.



The screen features a blue envelope icon with a keyhole and a key inside, set against a white background with a subtle shadow. Below the icon, the text "Instant sign in" is centered. Underneath, it says "Get a link sent to your inbox to sign in—no password necessary." There is a text input field labeled "Email Address" containing "John@Simplepractice.com". Below the input field is a blue button with the text "Email Me a Link". At the bottom of the screen, there is a light blue footer with the text "New client? [Request appointment](#) →".

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](#).

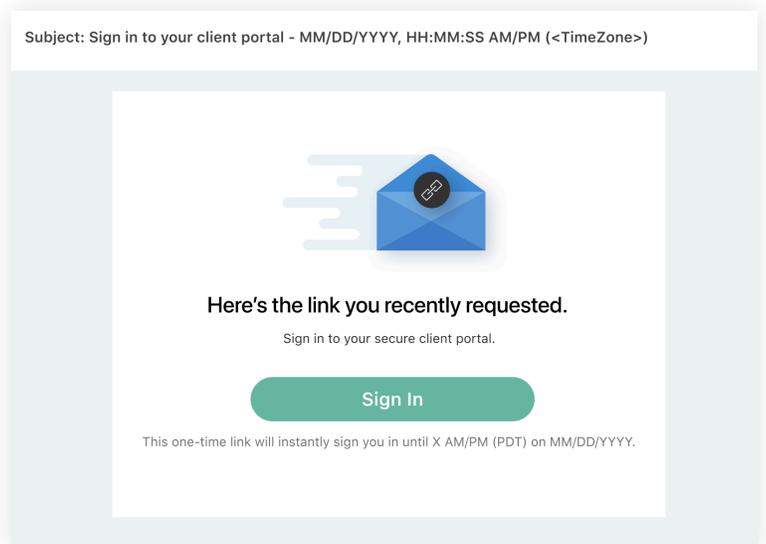


The screen features a blue envelope icon with a keyhole and a key inside, set against a white background with a subtle shadow and motion lines to the left. Below the icon, the text "Your instant sign-in link is on the way" is centered. Underneath, it says "If an account for John@simplepractice.com exists, you'll receive an email with the link." Below that, it says "The link expires in 24 hours and can only be used once." At the bottom of the screen, there is a light blue footer with the text "Didn't get the link? [Try these tips](#)." and a blue arrow pointing left with the text "Back to Instant sign in screen".

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.

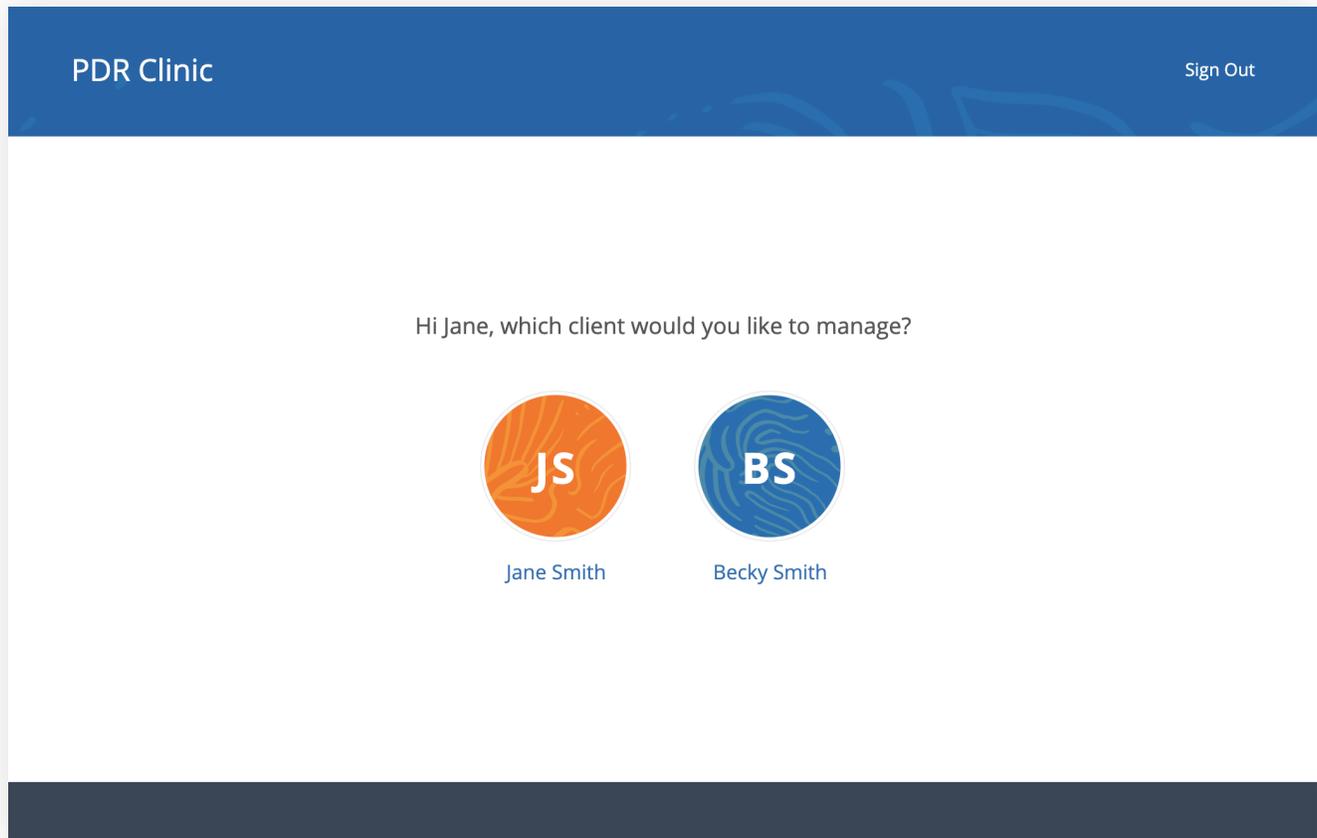
Subject: Sign in to your client portal - MM/DD/YYYY, HH:MM:SS AM/PM (<TimeZone>)



The screen features a blue envelope icon with a keyhole and a key inside, set against a white background with a subtle shadow and motion lines to the left. Below the icon, the text "Here's the link you recently requested." is centered. Underneath, it says "Sign in to your secure client portal." Below that is a green button with the text "Sign In". At the bottom of the screen, there is a light blue footer with the text "This one-time link will instantly sign you in until X AM/PM (PDT) on MM/DD/YYYY."

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.



TROUBLESHOOTING SIGN-IN ISSUES

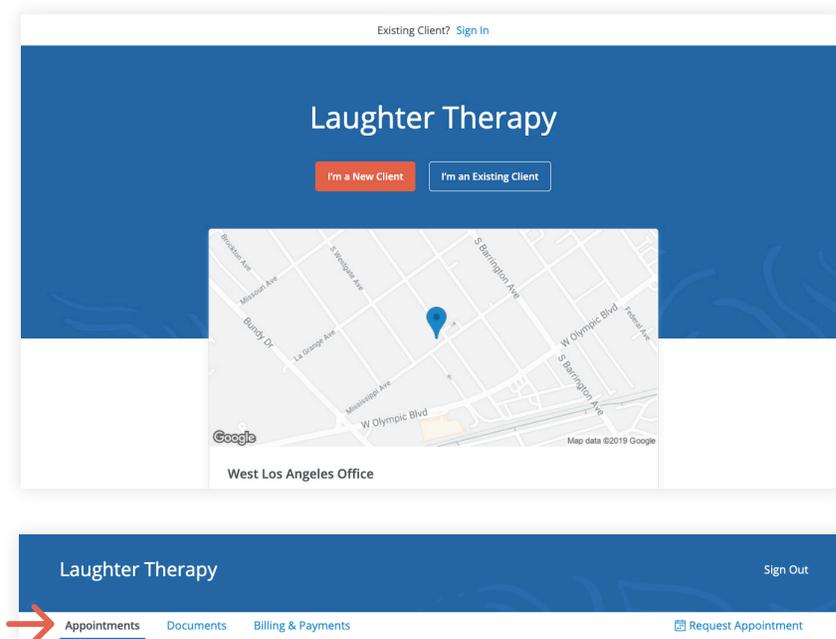
1. Make sure that you're entering the correct email address and double-check the spelling. Click **request a new link** if you want to re-enter your email address.
2. Check the **spam/junk folder** and any other folders in your inbox for an email from no-reply@simplepractice.com. Add this address as 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.

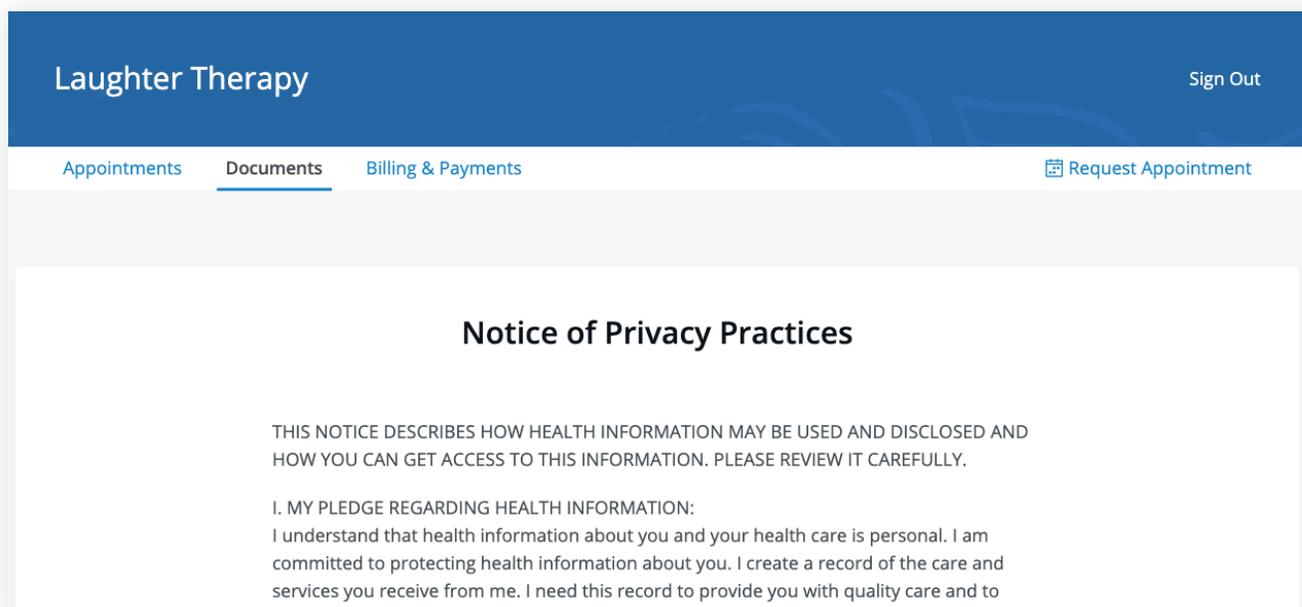
To request appointments through the Client Portal:

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.



Some documents can be signed electronically 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 documents that your clinician has shared with you, view the **Documents** tab.

The screenshot shows the Olive Branch Clinic interface. At the top, there is a blue header with the clinic name and a 'Sign Out' button. Below the header is a navigation bar with 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 listing documents with their respective completion dates.

Needs to be completed	Date received
Standard Intake Questionnaire Template	Sep 27, 2019

Completed	Date completed
ABA Child Intake Form	Oct 22, 2019
Notice of Privacy Practices	Sep 27, 2019
Informed Consent for Psychotherapy	Sep 27, 2019
Practice Policies	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 and the text 'Upload Files or drop files here'. Below this, it specifies supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. At the bottom, there is a list of uploaded files, including 'Screen Shot 2019-10-10 at 11.17.18 AM.png' with a date of 'Oct 14, 2019'.



Congratulations!

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

Secure Messaging

with  simplepractice

Secure Messaging lets you message your clinician directly. Connect with your clinician from anywhere using any device, as long as you have internet connection.

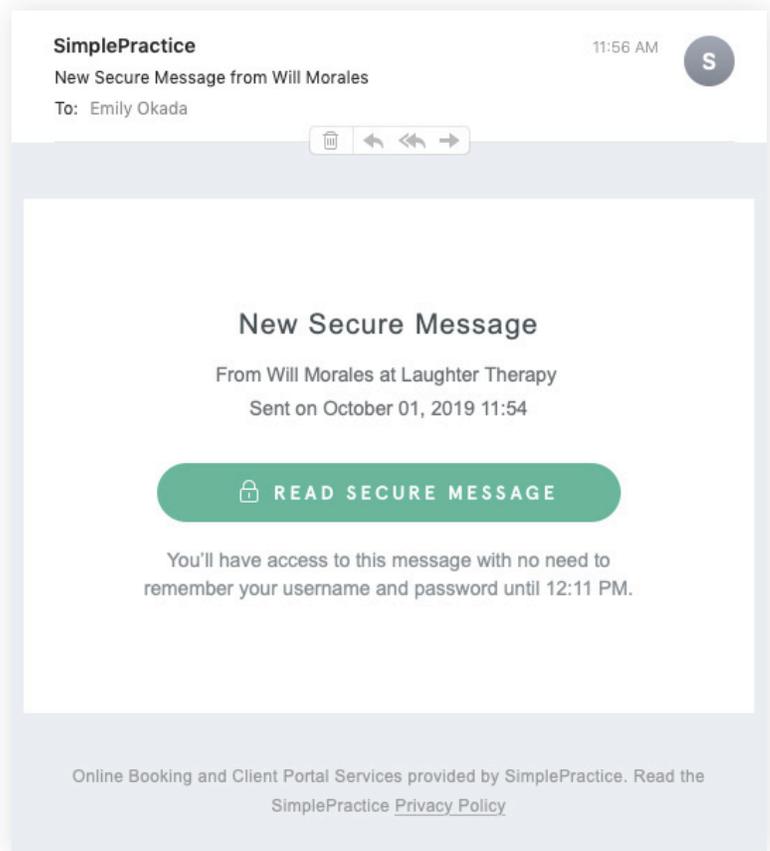
SECTIONS:

1. Message notifications
2. How to reply

MESSAGE NOTIFICATIONS

When your clinician sends you a secure message, you'll receive an email that looks like this:

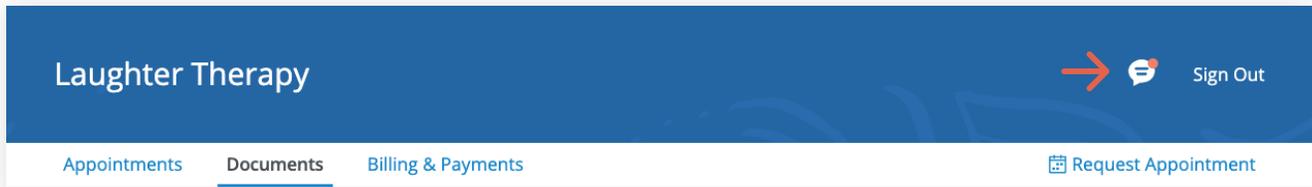
1. Click the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**. You can then view and reply to messages directly from there. This works the same way whether you're on your computer or your mobile device.



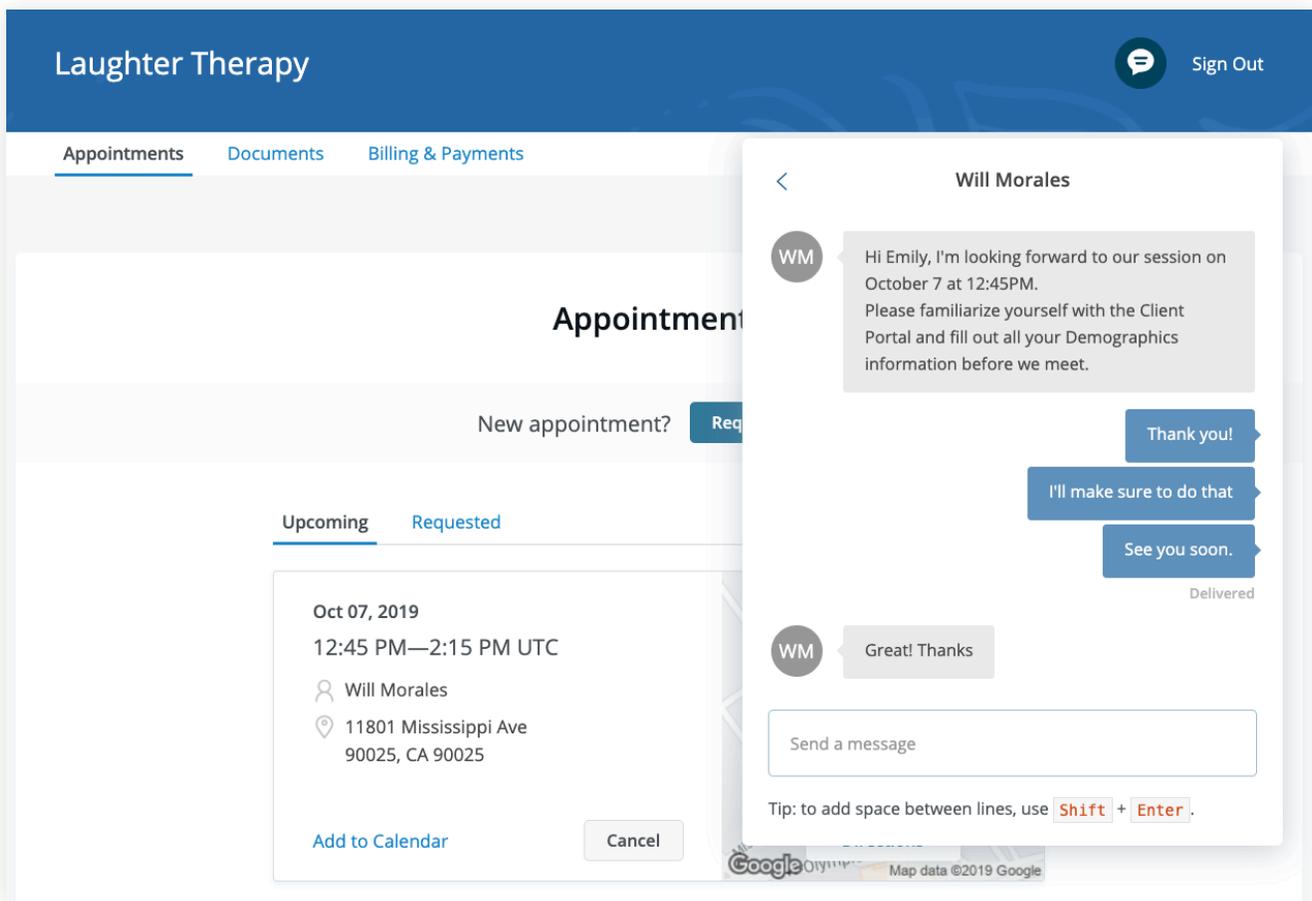
NOTE: After 15 minutes pass from when you receive the email, you'll have to log in to view your message through the Sign In link you'll receive via email.

HOW TO REPLY

You can check your messages or send new ones at any time by logging into the Client Portal. Once you log into the portal, just click the **Secure Message icon** to view or send messages. If you received a new message, an **orange dot** will indicate that.



Start typing your message in the box that says **Send a message**, then hit enter (or return) on your keyboard when you're ready.



Congratulations!

You're now ready to start using Secure Messaging.

How to Request Appointments

with  simplepractice

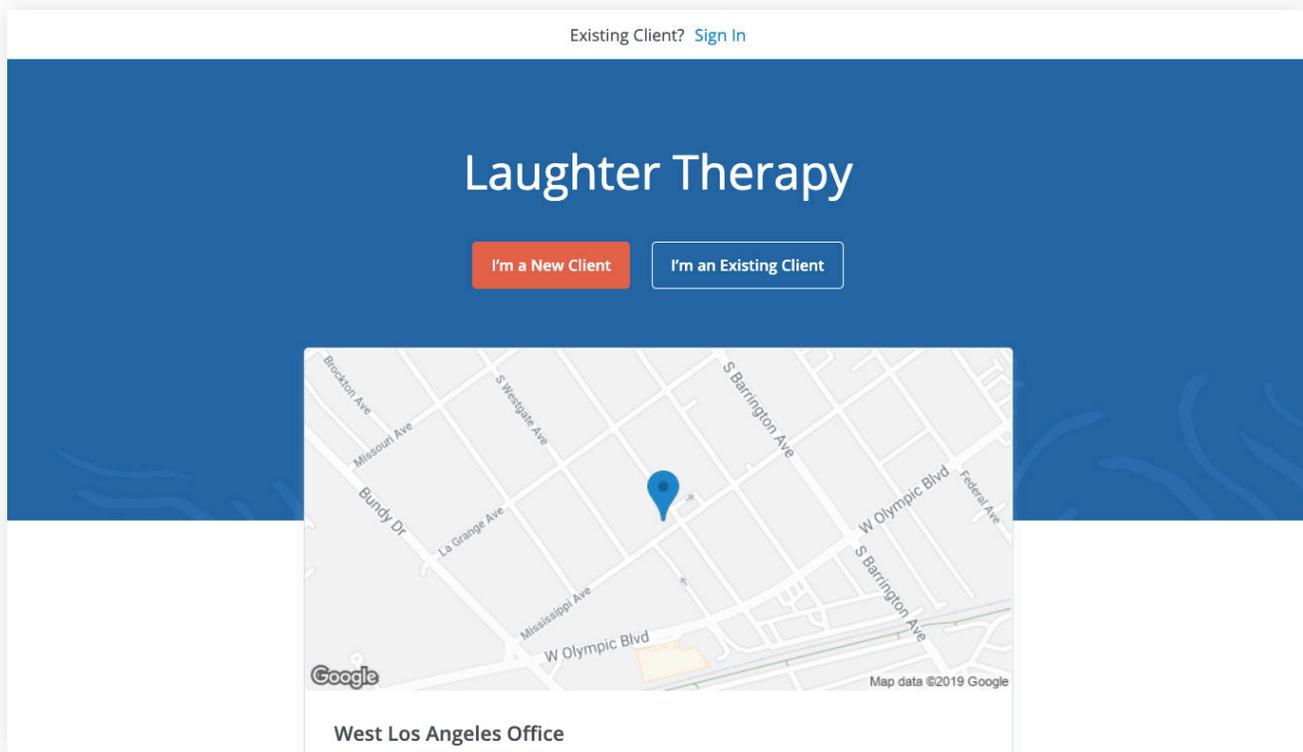
Online Booking lets you request, cancel, or reschedule appointments with your clinician.

SECTIONS:

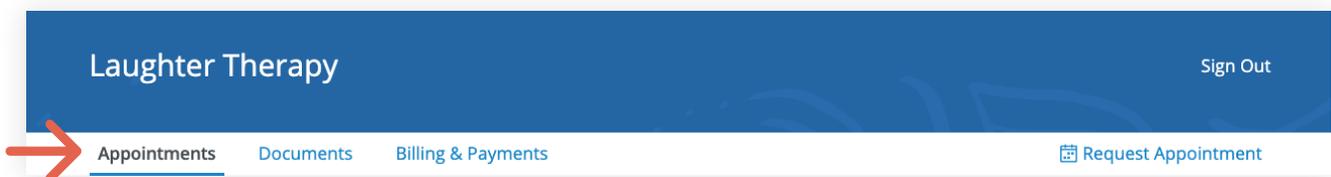
1. Request an appointments
2. Cancelling requests

REQUEST AN APPOINTMENT

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.



2. Navigate to the **Appointments tab** (This may already be selected by default).



3. Select your **clinician** (if there are multiple).

Laughter Therapy

Existing client? [Sign In](#)

Request an appointment

- 1 Choose Clinician**
- 2 Select Service
- 3 Select Location
- 4 Select Date & Time
- 5 Your Information

Will Morales	Select
Jaime Thomas	Select
Jeremy Abbey	Select

4. Select your **service**.

Laughter Therapy

Existing client? [Sign In](#)

Request an appointment

- ✓ Clinician
Will Morales
- 2 Select Service**
- 3 Select Location
- 4 Select Date & Time
- 5 Your Information

90 Minute Session 1 hour, 30 minutes	Select
Psychotherapy, 45 min 45 minutes	Select

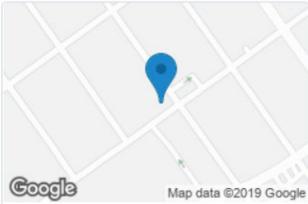
5. Choose your **office location** (there may only be one to select from, as shown below)

Laughter Therapy

Existing client? [Sign In](#)

Request an appointment

- ✓ Clinician
Will Morales
- ✓ Service
90 Minute Session
1 hour, 30 minutes
- 3 Select Location**
- 4 Select Date & Time
- 5 Your Information



West Los Angeles Office
11801 Mississippi Ave
90025, CA 90025
(123) 123-1212

Select

6. Click the **date and time** that you'd like.

Laughter Therapy

Existing client? [Sign In](#)

Request an appointment

- ✓ Clinician
Will Morales
- ✓ Service
90 Minute Session
1 hour, 30 minutes
- ✓ Location
West Los Angeles Office
11801 Mississippi Ave
90025, CA 90025
(123) 123-1212
- ✓ Date & time
Mon, Sep 30, 2019
10:30 AM - 12:00 PM
PDT
- 5 Your Information

September 2019

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	★ Today	28
29	30	1	2	3	4	5

Availability on Mon, Sep 30, 2019
Viewing in PDT [Change](#)

Morning	Afternoon	Evening
10:00 AM	12:00 PM	--
10:15 AM	12:15 PM	--
10:30 AM	12:30 PM	--
10:45 AM	12:45 PM	--
11:00 AM	1:00 PM	--
11:15 AM	1:15 PM	--
More Times	More Times	

Show availability for:

- Mornings Before 12pm
- Afternoons 12pm - 4pm

7. Your appointment request has been **sent** to your clinician. Your clinician will need to accept your request to make it official.

You can click to view a map of the office location, or add the session to your calendar.

Thank you, Alice!

We will send you a confirmation after your appointment has been confirmed.

When
Mon, Sep 30, 2019
11:15 AM - 12:45 PM
PDT

With
Will Morales

What
90 Minute Session

Where
West Los Angeles Office
[11801 Mississippi Ave](#)
[90025, CA 90025](#)
(123) 123-1212



Add to Calendar

[Google](#) [Apple](#) [Outlook](#)

[Cancel Appointment](#)

8. If your request is accepted, you'll receive an **email** confirming the session.

9. If they cannot see you at that time, you'll receive a link to reschedule. Click it to go back to your Client Portal and request a new session.

Appointments

New appointment? [Request Now](#)

Upcoming Requested

Sep 30, 2019
11:15 AM—12:45 PM UTC

Will Morales

11801 Mississippi Ave
90025, CA 90025

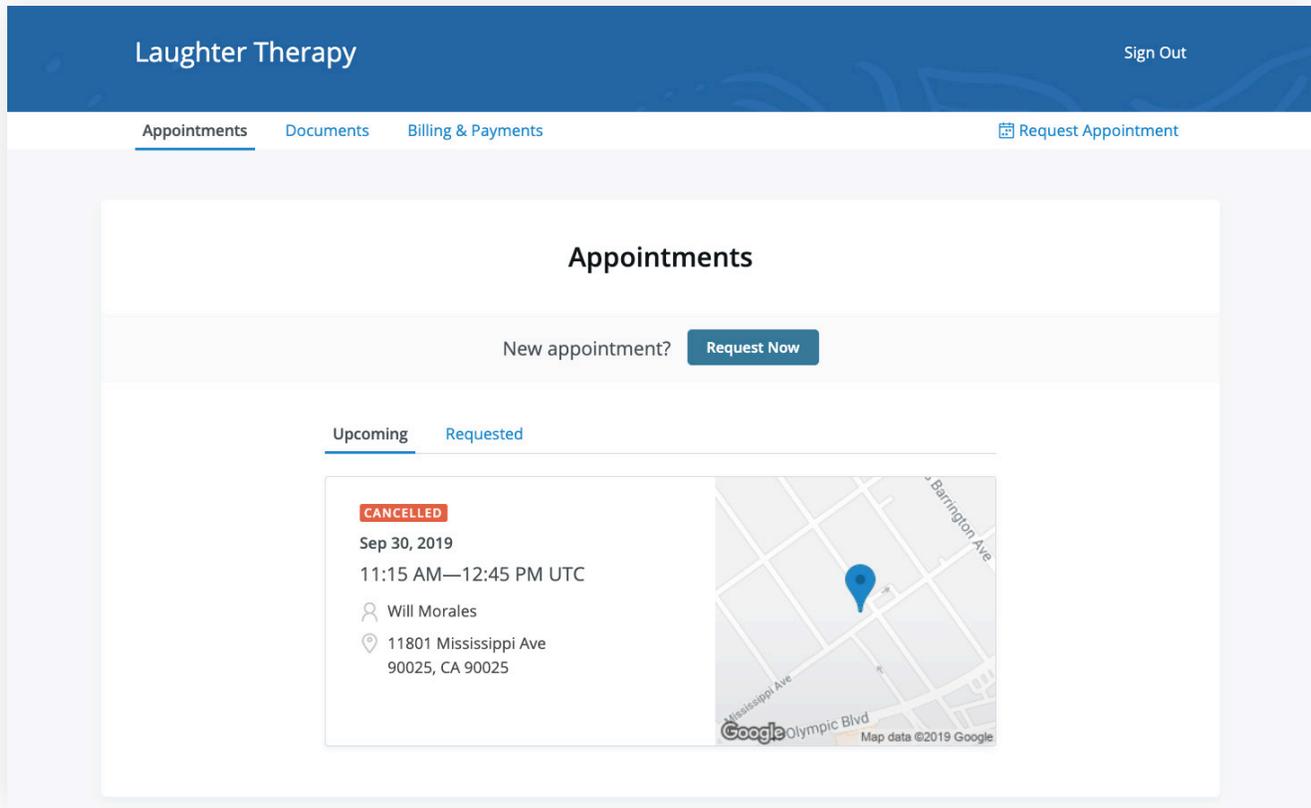
[Add to Calendar](#) [Cancel](#)



[Directions](#)

VIEWING AND CANCELLING REQUESTS

You'll see a list of your upcoming requests and confirmed or denied appointments on the Appointments page of your client portal. Click **Cancel Session** to cancel your appointment request.



The screenshot displays the 'Appointments' page in the Laughter Therapy client portal. At the top, there's a navigation bar with 'Laughter Therapy' and 'Sign Out'. Below it, a secondary navigation bar includes 'Appointments', 'Documents', 'Billing & Payments', and 'Request Appointment'. The main content area is titled 'Appointments' and features a 'New appointment?' section with a 'Request Now' button. Underneath, there are two tabs: 'Upcoming' (selected) and 'Requested'. A single appointment card is shown, marked 'CANCELLED' in a red box. The appointment details are: 'Sep 30, 2019', '11:15 AM—12:45 PM UTC', 'Will Morales', and '11801 Mississippi Ave, 90025, CA 90025'. To the right of the text is a map snippet showing the location on Mississippi Ave and Barrington Ave.

NOTE: You'll only be able to cancel this way according to your clinician's cancellation policy. If you attempt to cancel too close to a session, or if they don't offer online cancellation, you'll receive a message to call their office to cancel.

Once your session is cancelled, you'll see this reflected on your **Appointments tab** in the Client Portal. Use this page to **check the status of your requests, cancel sessions, or schedule new ones.**



Congratulations!

You're now ready to start booking appointments in your Client Portal.

How to Pay Your Bills

with  simplepractice

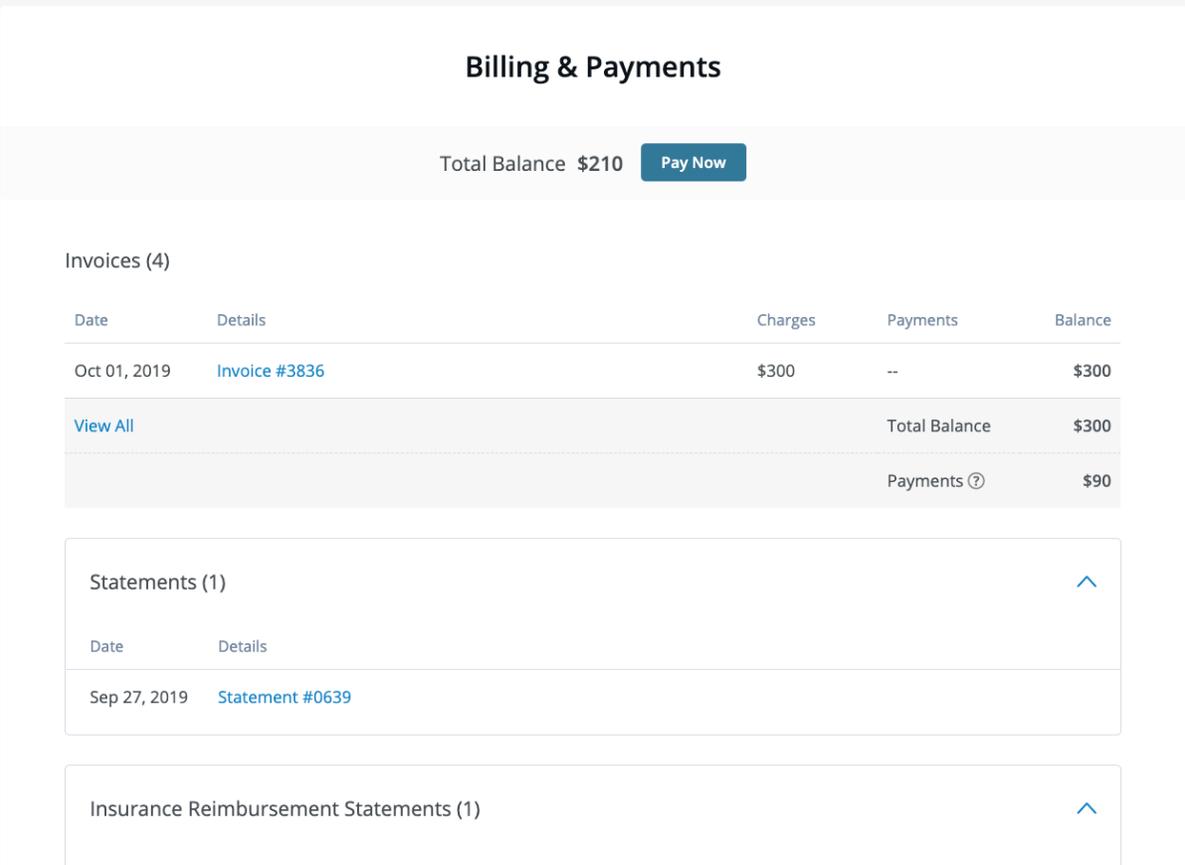
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

SECTIONS:

1. Viewing your billing history and documents
2. Making payments

VIEWING YOUR BILLING HISTORY AND DOCUMENTS

1. After logging into the Client Portal, click **Billing & Payments** to see your billing page. This page provides you with an overview of your recent payment history and access to your billing documents.
2. You'll see three sections for **Invoices**, **Statements**, and **Insurance Reimbursement Statements** (superbills).



Billing & Payments

Total Balance \$210 [Pay Now](#)

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	\$300	--	\$300
View All			Total Balance	\$300
			Payments 	\$90

Statements (1) [^](#)

Date	Details
Sep 27, 2019	Statement #0639

Insurance Reimbursement Statements (1) [^](#)

3. At the very bottom there's a section for **Account History** that shows your most recent sessions and payments.

Account History ^				
Date Range: All Time				
Date	Type	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	\$300	--	\$210
Oct 01, 2019	Invoice #3835 PAID	CR \$90	--	CR \$90
Oct 01, 2019	Invoice #3834 PAID	\$30	--	\$0
Oct 01, 2019	Cash payment	--	(\$30)	CR \$30
Sep 27, 2019	Invoice #3832 PAID	\$150	--	\$0
Sep 27, 2019	Cash payment	--	(\$150)	CR \$150

4. Adjust the **date range** to display whichever sessions you'd like by clicking the calendar icon.

Account History ^																																																																																																						
09/02/2019 - 10/01/2019																																																																																																						
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> All Time << September October >> </div> <div style="margin-left: 10px;"> Payments Balance </div> </div>																																																																																																						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="7">September</th> <th colspan="7">October</th> </tr> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> </thead> <tbody> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> <td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> <td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> <td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td> </tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> <td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td> </tr> </tbody> </table>					September							October							Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	1	2	3	4	5	6	7	29	30	1	2	3	4	5	8	9	10	11	12	13	14	6	7	8	9	10	11	12	15	16	17	18	19	20	21	13	14	15	16	17	18	19	22	23	24	25	26	27	28	20	21	22	23	24	25	26	29	30	1	2	3	4	5	27	28	29	30	31	1	2
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TIP: Once you open a document, you can click **Print** to print it or **Download PDF** to download it to your computer.

✕ **Statement for Insurance Reimbursement #0730** Download Print
Emily Okada

From **Laughter Therapy**
11801 Mississippi Ave
90025, CA 90025

Statement for Insurance Reimbursement

To **Emily Okada**

MAKING PAYMENTS

It's easy to pay your bills in the Client Portal and stay on top of your payment history. Your **current balance** displays at the top of the page. You can either pay this entire balance, or pay a specific invoice.

1. To pay your entire balance, click **Pay Now** next to the balance amount.

Laughter Therapy Sign Out

[Appointments](#) [Documents](#) [Billing & Payments](#) [Request Appointment](#)

Billing & Payments

Total Balance \$210 Pay Now ←

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	Invoice #3836	\$300	--	\$300
View All			Total Balance	\$300
			Payments ⓘ	\$90

2. To pay a specific invoice, open the invoice and click **Pay Now** at the top.

The screenshot shows an invoice interface. At the top left is a close button (X) and the title 'Invoice #3836' with the name 'Emily Okada'. To the right are three buttons: 'Download', 'Print', and 'Pay Now'. A red arrow points to the 'Pay Now' button. Below the header, the 'From' section lists 'Laughter Therapy' with an address in California. The 'To' section lists 'Emily Okada' with an address in Santa Monica, CA. The word 'Invoice' is centered. On the right, there is a blue rectangular placeholder. At the bottom, there are two columns of information: 'Client' (Emily Okada) and 'Provider' (Will Morales) with their respective tax IDs.

No matter which pay button you choose, the next steps are the same:

1. Enter the cardholder's name, card info, and billing zip code.
2. If you'd like to store this card to use in the future, check the **Save Card** box.
3. The amount on the **Pay** button will reflect the payment that you're making. Make sure it's the correct amount, then click **Pay \$(amount)**.
4. You'll see that the status next to that invoice date in your **Account History** section has changed to **Paid**.

If you stored the card, you'll be able to select this card for future payments.

The screenshot shows a 'Billing & Payments' modal window. The title is 'Make a payment' with a close button (X). The form contains several input fields: 'Cardholder's name' (filled with 'Emily Okada'), 'Card number' (filled with 'Card Number'), 'Expiration' (filled with 'MM / YY'), 'Security code' (filled with 'CVC'), and 'Billing zipcode' (empty). There is a checked checkbox for 'Save Card'. At the bottom right, there are two buttons: 'Cancel' and 'Pay \$360'.



Congratulations!

You're now ready to start managing billing in your Client Portal.