

THE CLIENT PORTAL GUIDE



WORK IT OUT COUNSELING

Aligning spiritual, emotional and physical well-being

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, and sign documents.

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 that looks like this:

Hi Alice,

Your Appointment on Monday, September 30th at 11:15 AM (PDT) with Will Morales has been confirmed.

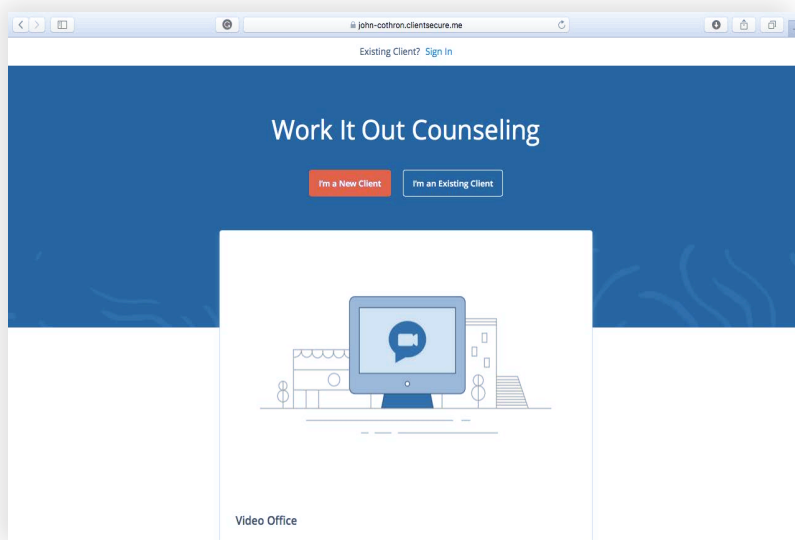
Before we meet, I would like you to review my practice documents and provide some information about yourself. This will help us get started.

Please click on this secure link below and login with the following:

Username: your email address

Password: 9029

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



1. Click on the link the the **welcome email**.
2. You will arrive at the Welcome Page, where you can enter your **Username** and **Password**.
3. Enter your **email address** in the Email Address field and your **4-digit PIN number** from the email in the Password field. This is your temporary password.
4. You'll then be prompted to **create a password**.

5. Enter a new password, then re-enter it, and click Update. This will be your password moving forward, each time you access the Client Portal. **Be sure to remember it!**

6. You are now **logged in**.

You will now be able to login to the Client Portal at any time, using your email address as your username and the password that you created above.

Please create a password for your client portal account

* Password

* Password confirmation

Update



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

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.

Work It Out Counseling Sign Out

Hi Jane, which client would you like to manage?

Jane Smith Becky Smith

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. If your clinician re-sends you an invitation, be sure to use the latest **4-digit passcode** to log in. Some email providers will collapse the emails into the same thread. Be sure to select the email that you received most recently. If you're not sure what your current 4-digit passcode is, your clinician can provide that info for you.
3. 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.
4. 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.
5. The same email can't be used for more than one portal account for the same clinician.

Tip: you only use the 4-digit passcode once. For each subsequent login, you'll use the new (8 or more digit) password that you created.

6. You can recover your password by clicking **"Forgot your password?"** below the Log in button. You'll be asked to enter your email address, and then you'll receive a password recovery email. Be sure to use the same email address that you normally use to log into your Client Portal, and check your spam

Sign in to the client portal

Email Address

Password

Log in

Forgot your password?



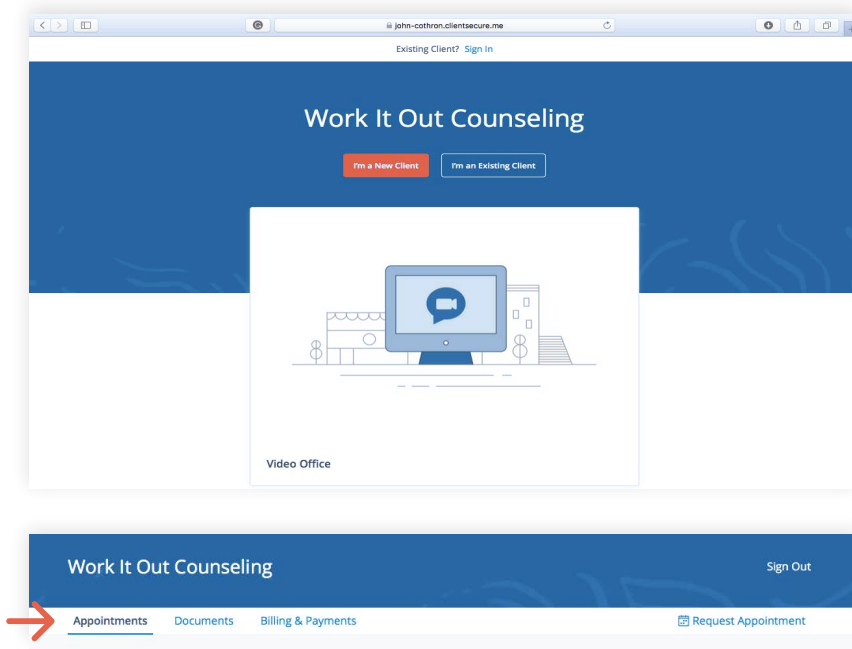
Are you a new client? [Request an appointment](#)

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 **check box** 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.

Work It Out Counseling Sign Out

Appointments Documents Billing & Payments Request Appointment

Documents, Forms and Files

Needs to be completed	Date received
Consent for Telehealth Consultation	Sep 30, 2019
Notice of Privacy Practices	Sep 30, 2019
Informed Consent for Psychotherapy	Sep 30, 2019
Practice Policies	Sep 30, 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.

My Uploads

[Upload Files](#) or drop files here

Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB

Screen Shot 2019-10-10 at 11.17.18 AM.png	Oct 14, 2019
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Congratulations!

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



WORK IT OUT
COUNSELING

Secure Messaging

with  simplepractice

Secure Messaging lets you send and receive messages directly with your clinician. Reschedule your session or ask a question from your phone.

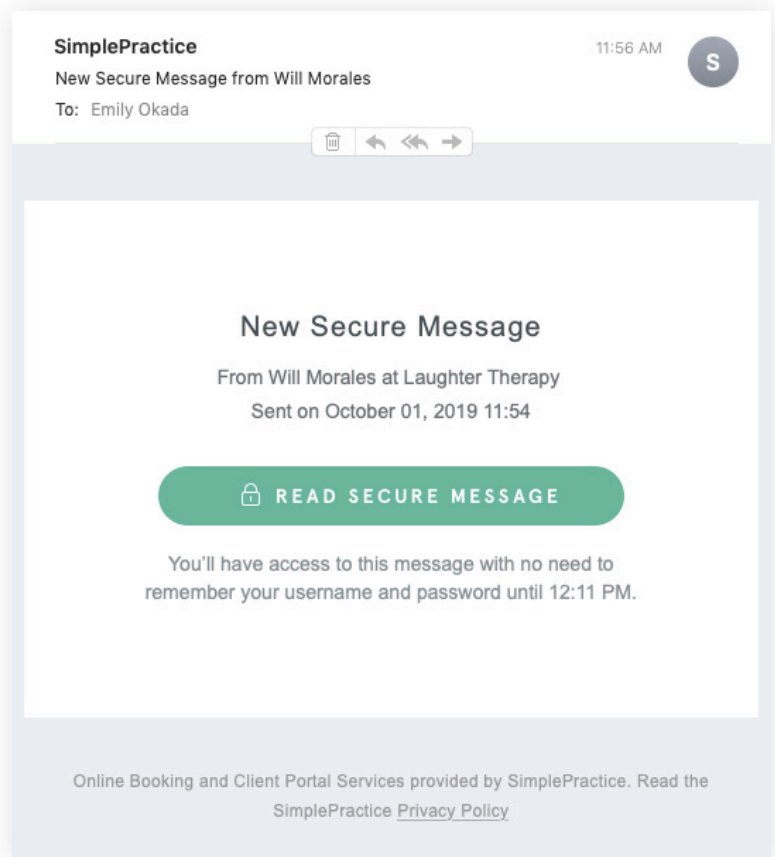
SECTIONS:

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 on 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 send messages directly from there. This works the same way whether you're on your computer or your mobile device.



NOTE: After 15 minutes, you'll have to enter your Client Portal username and password to log in and view your message.

HOW TO REPLY

Start typing your message in the box that says “Send a message,” then hit Send when you’re ready.

The screenshot shows the 'Work It Out Counseling' client portal. The top navigation bar includes 'Work It Out Counseling' and a 'Sign Out' link. Below the navigation are tabs for 'Appointments', 'Documents', and 'Billing & Payments'. The main content area displays an appointment card for 'Will Morales' on 'Oct 07, 2019' from '12:45 PM—2:15 PM UTC' at '11801 Mississippi Ave, 90025, CA 90025'. A 'Secure Message' icon is visible in the top right corner of the portal. An overlay window shows a message conversation with 'Will Morales' (WM) containing the text: 'Hi Emily, I'm looking forward to our session on October 7 at 12:45PM. Please familiarize yourself with the Client Portal and fill out all your Demographics information before we meet.' The user has replied with 'Thank you!', 'I'll make sure to do that', and 'See you soon.' (marked as 'Delivered'). WM has replied with 'Great! Thanks'. A text input field at the bottom of the overlay says 'Send a message' and includes a tip: 'Tip: to add space between lines, use Shift + Enter.'

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 on the **Secure Message icon** to view your message. The **orange dot** indicates a new message is waiting.

This screenshot shows the top portion of the 'Work It Out Counseling' client portal. The header bar contains the logo, 'Work It Out Counseling', and a 'Sign Out' link with an orange arrow icon. Below the header is a navigation bar with tabs for 'Appointments', 'Documents', and 'Billing & Payments'. A 'Request Appointment' button is located on the right side of the navigation bar.



Congratulations!

You're now ready to start using Secure Messaging.



WORK IT OUT
COUNSELING

How to Request Appointments

with  simplepractice

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

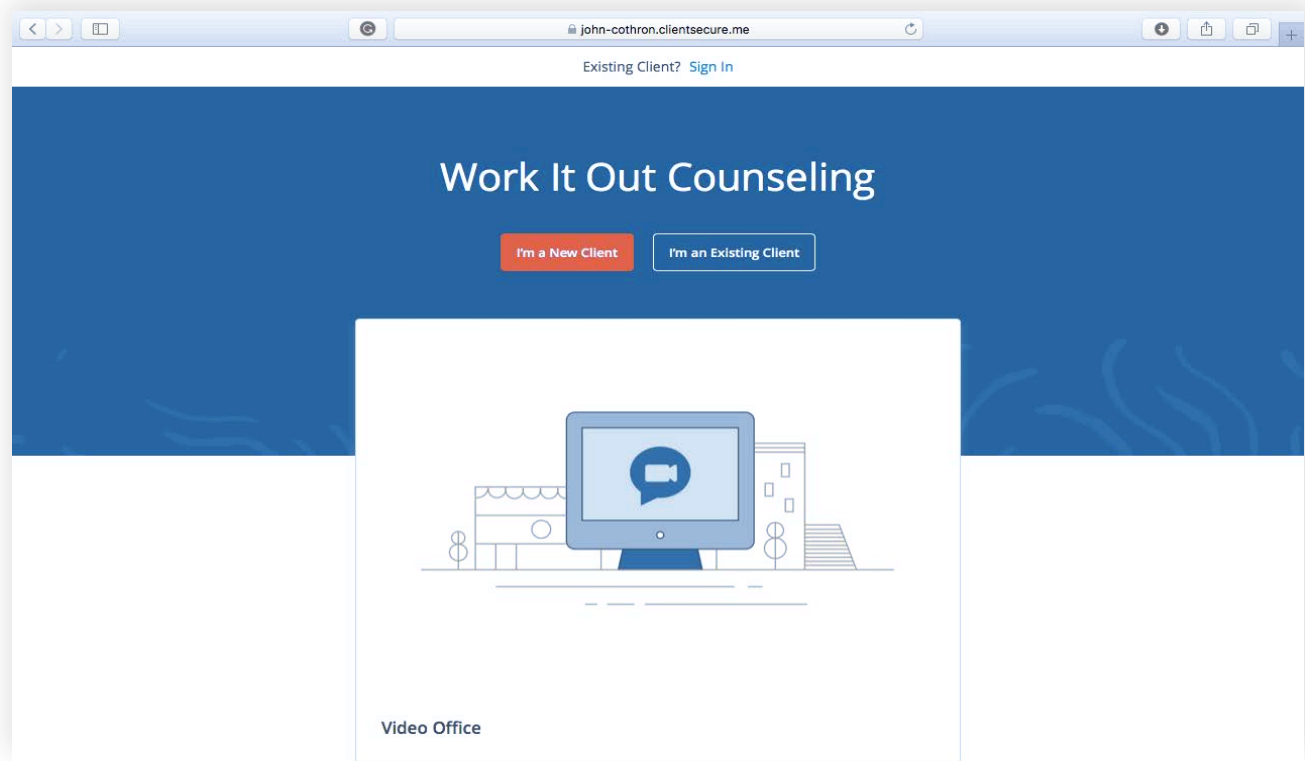
SECTIONS:

1. Request a session
2. Cancelling requests

REQUEST A SESSION

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).



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

The screenshot shows a web interface for 'Work It Out Counseling'. At the top, there is a blue header with the text 'Work It Out Counseling' on the left and 'Sign Out' on the right. Below the header, the main content area is white and titled 'Request an appointment'. On the left side of this area, there is a vertical list of steps: 1. Choose Clinician (highlighted in blue), 2. Select Service, 3. Select Location, 4. Select Date & Time, and 5. Your Information. To the right of the steps, there are three selection boxes. The first box contains the name 'Will Morales' and a blue 'Select' button. The second box contains the name 'Jaime Thomas' and a blue 'Select' button. The third box contains the name 'Jeremy Abbey' and a blue 'Select' button. Above the first box, there is a link that says 'Existing client? Sign In'.

4. Select your **service**. What type of appointments do you see your clinician for?

The screenshot shows the same web interface as above, but now the 'Select Service' step is highlighted in blue. The navigation menu at the top now includes 'Appointments', 'Documents', 'Billing & Payments', and 'Request Appointment' (which is underlined). The 'Request an appointment' form now shows two selection boxes. The first box contains the text 'Psychotherapy, 60 min' and '50 minutes' with a blue 'Select' button. The second box contains the text 'Family psychotherapy, conjoint psychotherapy with the patient present' and '50 minutes' with a blue 'Select' button.

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

The screenshot shows the 'Request an appointment' page with a blue header containing 'Work It Out Counseling' and 'Sign Out'. Below the header is a navigation bar with 'Appointments', 'Documents', 'Billing & Payments', and 'Request Appointment'. The main content area is titled 'Request an appointment' and features a progress indicator with three steps: 1. Service (checked), 2. Select Location (active), and 3. Select Date & Time. The service details are 'Psychotherapy, 60 min 50 minutes'. A map shows the location of 'Work It Out Counseling' at 4300 S Hwy 27 STE 205B, Clermont, FL 34711, with a phone number (407) 949-0214 and a 'Select' button.

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

The screenshot shows the 'Request an appointment' page with a blue header containing 'Work It Out Counseling' and 'Sign Out'. Below the header is a navigation bar with 'Appointments', 'Documents', 'Billing & Payments', and 'Request Appointment'. The main content area is titled 'Request an appointment' and features a progress indicator with three steps: 1. Service (checked), 2. Location (checked), and 3. Select Date & Time (active). The service details are 'Psychotherapy, 60 min 50 minutes'. The location details are 'Work It Out Counseling, 4300 S Hwy 27 STE 205B, Clermont, FL 34711, (407) 949-0214'. A calendar for March 2020 shows the 25th selected. To the right, the availability for Wednesday, Mar 25, 2020 is shown in EDT, with options for 12:00 PM, 2:00 PM, 2:30 PM, and 3:00 PM. Below the calendar, there are checkboxes for 'Afternoons 12pm - 4pm' and 'Evenings After 4pm', both of which are checked.

7. Your appointment request has been **sent** to your clinician (Your clinician will need to accept your request).

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

Thank you, Chantel!


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

When
Wed, Mar 25, 2020
2:00 PM - 2:50 PM EDT

With
John Cothron

What
Psychotherapy, 60 min

Where
Work It Out Counseling
4300 S Hwy 27 STE 205B
Clermont, FL 34711
(407) 949-0214



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.

Work It Out Counseling Sign Out


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


Appointments

New appointment? [Request Now](#)

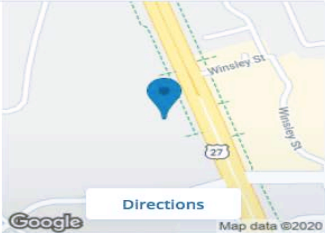
Upcoming Requested

Mar 25, 2020
2:00 PM—2:50 PM EDT

 John Cothron

 4300 S Hwy 27 STE 205B
Clermont, FL 34711

[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 shows the 'Work It Out Counseling' client portal. The top navigation bar includes 'Sign Out' and a 'Request Appointment' button. The main content area is titled 'Appointments' and features a notification: 'Appointment cancelled successfully.' Below this, there is a 'Request Now' button. The 'Upcoming' tab is selected, showing a cancelled appointment for 'Mar 25, 2020' from 2:00 PM to 2:50 PM EDT with John Cothron at 4300 S Hwy 27 STE 205B, Clermont, FL 34711. A map shows the location on Winsley St. The appointment is marked as 'CANCELLED' in a red box.

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.



WORK IT OUT
COUNSELING