GETTING STARTED GUIDE

The Client Portal

with simplepractice

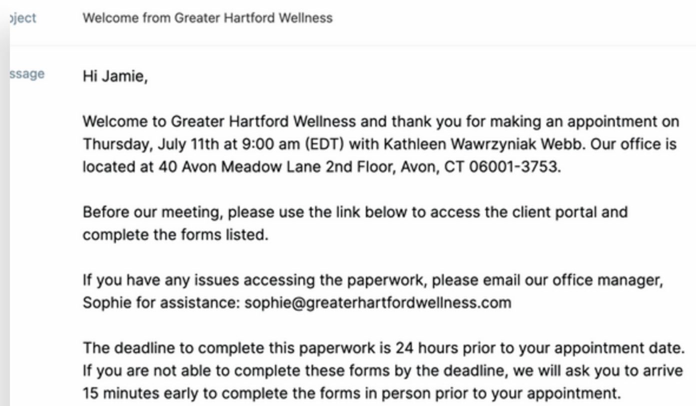
The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your appointment fees.

SECTIONS:

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 GHW.

Clicking the link will open a new tab in your browser where you'll automatically get logged in.



ject Welcome from Greater Hartford Wellness

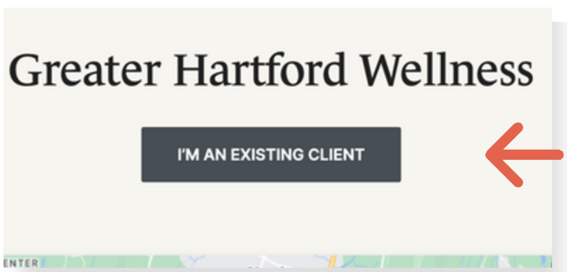
ssage Hi Jamie,

Welcome to Greater Hartford Wellness and thank you for making an appointment on Thursday, July 11th at 9:00 am (EDT) with Kathleen Wawrzyniak Webb. Our office is located at 40 Avon Meadow Lane 2nd Floor, Avon, CT 06001-3753.

Before our meeting, please use the link below to access the client portal and complete the forms listed.

If you have any issues accessing the paperwork, please email our office manager, Sophie for assistance: sophie@greaterhartfordwellness.com

The deadline to complete this paperwork is 24 hours prior to your appointment date. If you are not able to complete these forms by the deadline, we will ask you to arrive 15 minutes early to complete the forms in person prior to your appointment.

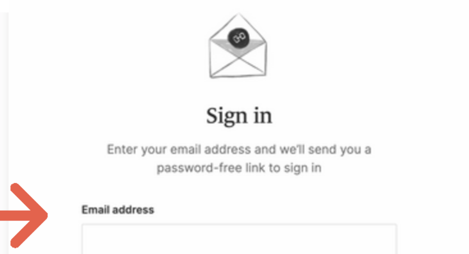


TO LOG BACK IN:

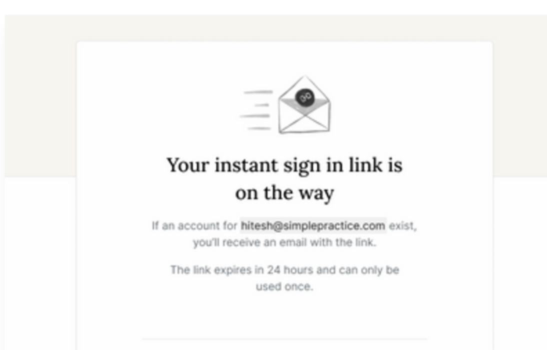
1. Go to GHW's **Client Portal button (on website) + select "access Client Portal"**
2. Click the **I'm an Existing Client**

Tip: Bookmark page for easy future logins.

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

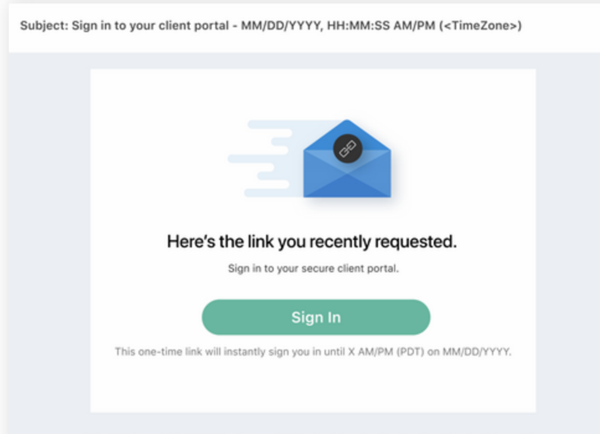


4. **Check your inbox** to find the sign-in email (note that the email link is valid for 24 hours and can only be used to sign in once)



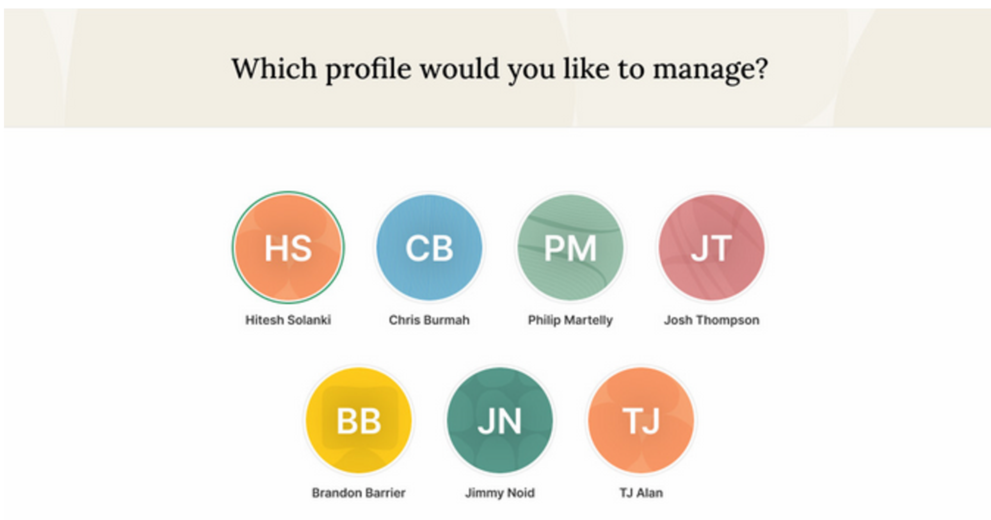
5. Click the **Sign In** link from the email to automatically log into your Client Portal. It expires after 24 hours and can only be used to log in one time.

Important: You must use the most recent Sign In link in your inbox. If you requested a Sign In link multiple times, make sure to click on the newest link.



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.



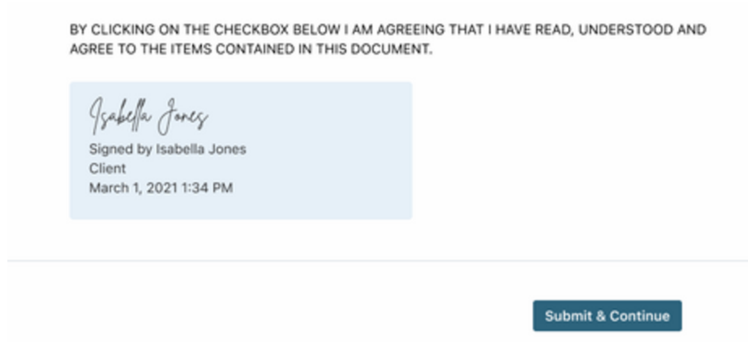
TROUBLESHOOTING SIGN-IN ISSUES

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.

DOCUMENTS AND FORMS

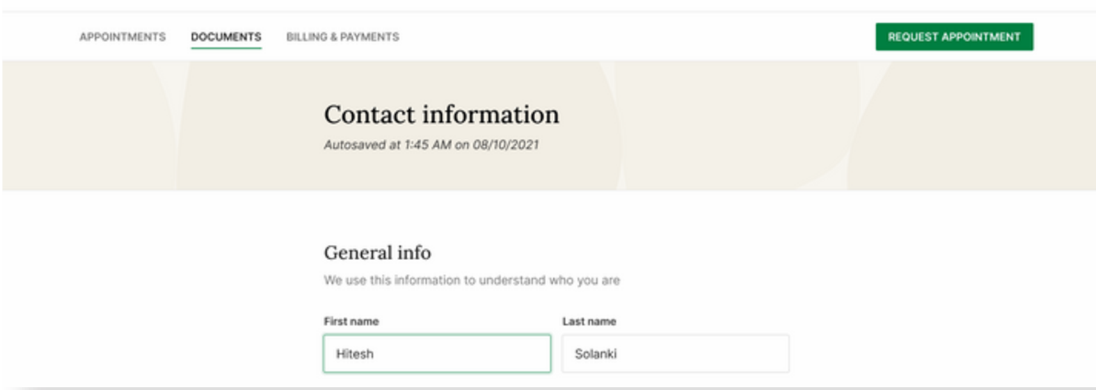
The first time you log into the Client Portal, you'll see a welcome message from your clinician. After you click **Get Started**, you'll begin completing forms for your clinician.



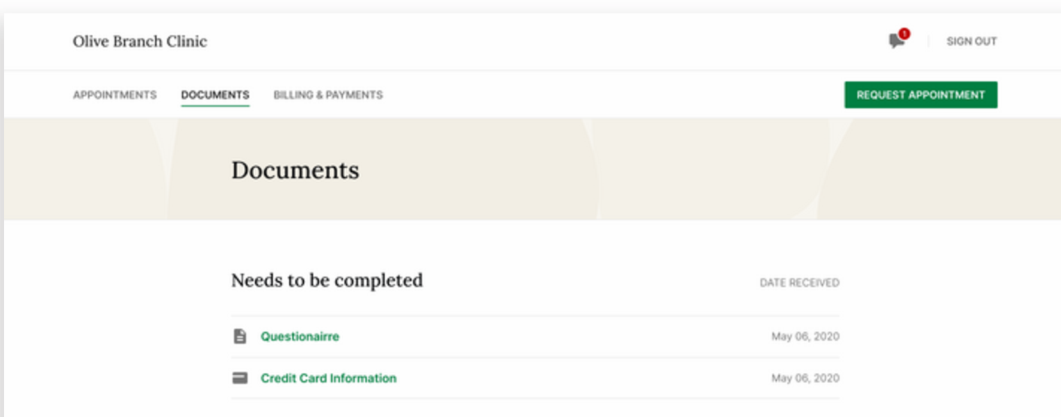
Some documents can be signed electronically by clicking **Sign here** at the bottom of the page.

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

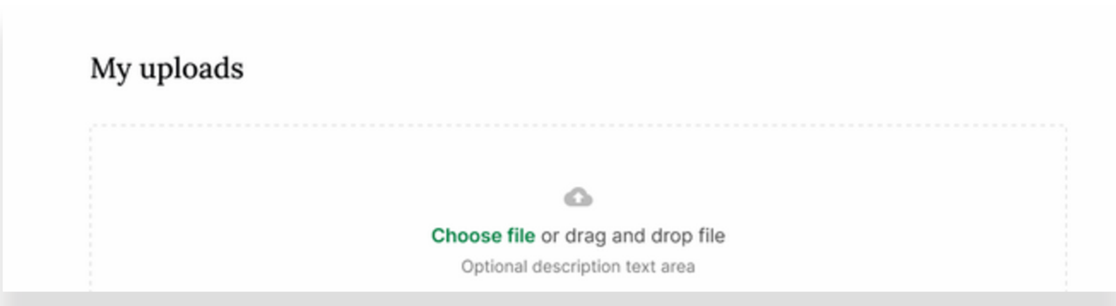
After signing some documents, you may be asked to fill out your contact details, demographics, credit card, and insurance information.



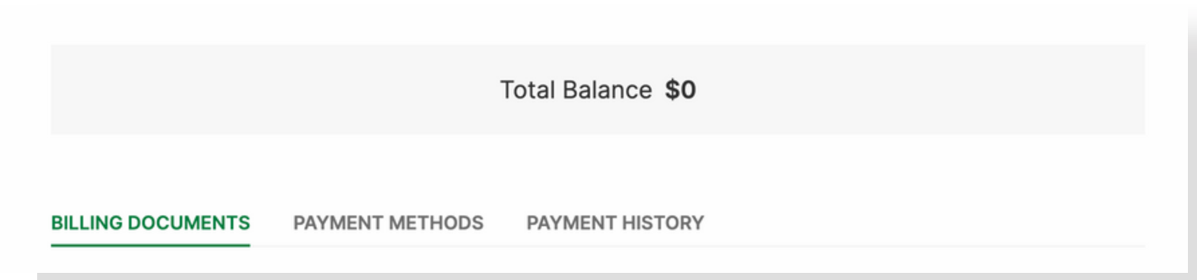
To view documents that your clinician has shared with you, view the **Documents** tab.



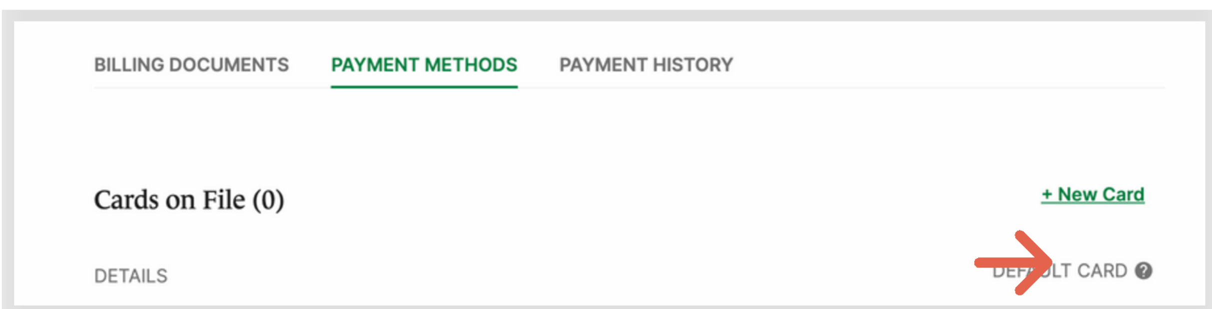
At the bottom of the **Documents** tab, you will be able to upload files to share with your clinician, including pdf, jpg, png, mp3, m4a, or csv files. You can click to view these at any time.



In the **Billing** tab, you will be able to view invoices, any outstanding balances, your on-file payment methods, and more.



Select the **Payment Methods** tab to add or replace the card on file, as well as to pay off any outstanding balance.



Scroll to the bottom of the **Billing** tab to find your newly uploaded **superbills** (also called "Insurance Reimbursement Statements").

Congratulations!

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