

## CLIENT GUIDE

# The Client Portal

Schedule appointments, complete forms, and submit payments with ease.



### Logging in for the first time

**Click the link** in the welcome email I sent you. A browser tab will open and you'll be signed in automatically.



### Bookmarking the Client Portal

**PRO TIP:** Save the Client Portal URL to your browser's bookmarks so you can **easily log in** again later.



### Logging in again

Go to the bookmarked URL and choose **"I'm an existing client."** Enter your email and receive a sign in link with instructions.



### Appointments Tab

1. View upcoming appointments
2. View requested appointments
3. Request new appointments

To request a new appointment, click the **"Request Now"** button.



### Documents Tab

1. View pending documents
2. View completed documents
3. Upload files securely

Upload files at the bottom by clicking **"Upload Files"** or dragging and dropping a file directly into the dotted lined box.



### Billing & Payments Tab

1. View your current balance
2. Pay your bills
3. View statements and account history

To pay your bills, click **"Pay Now"** and enter a payment card.



### Secure Messaging

1. Securely chat with your clinician
2. View past chats with your clinician

When I send you a new message, you'll receive an email that will guide you to sign into the Client Portal.

LOG IN AT: