therapyappointment

you provide the therapy • we provide the rest

Client Portal Guide

New to the Client Portal? Find what you need with our quick guide.
Click the headers below for more information:

	Dashboard Getting started in your client portal can feel a bit overwhelming! Understanding your portal **Dashboard** is a great place to begin for an overview of your account.
	My Profile Managing and accessing important details, such as contacts, reminders, saved credit cards, and login credentials are found within **My Profile.**
	Docs & Forms Accessing, completing, and viewing documents and forms from your client portal is simple from within **My Docs & Forms.**
	Appointments Clients can self-schedule appointments from the **My Appointments** area of the system, as well as see any upcoming appointments on the schedule for them.
	Messages Your portal inbox messages and attachments to providers and staff are both accessed and managed within **My Messages.**
	My Account (Billing) Access accounting & billing related information like balance details, payment history, and statements all within **My Account.**
	Insurance Review and manage insurance details or changes: including insurance information as well as private pay under **My Insurance.**