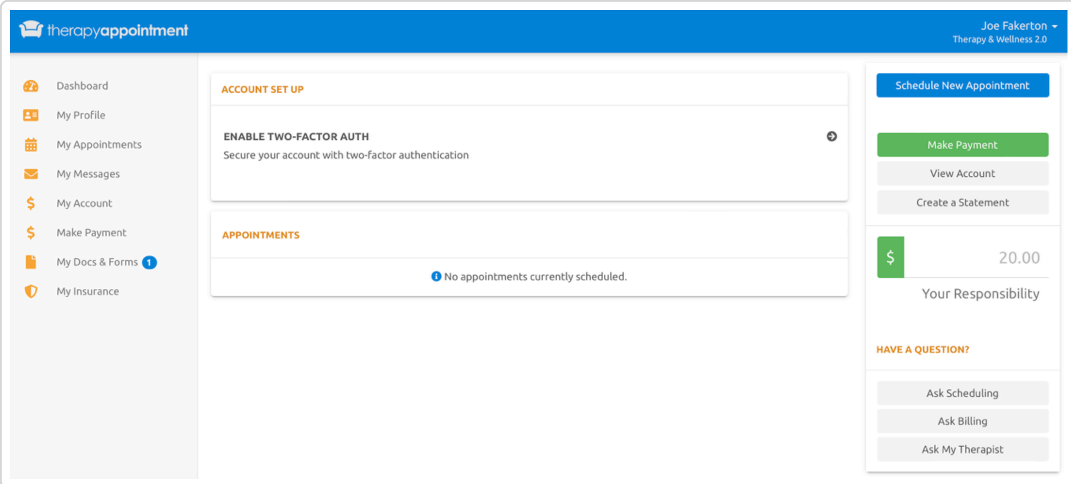


Tasks On The Dashboard

Above is a client portal dashboard once signed in for the first time.

From the dashboard you'll notice the following:

Two-Factor Authentication

- Two-Factor Authentication keeps the client account more secure.
- Although not a requirement to set up, TherapyAppointment **strongly encourages enacting this additional protection**. The client is notified via email when logging in from an unrecognized device
- Once enabled, the client will be prompted to enter the two factor code when signing in from an unrecognized device

⚠️ **Note:** Clients can change this either from the dashboard, or under their **My Profile** area

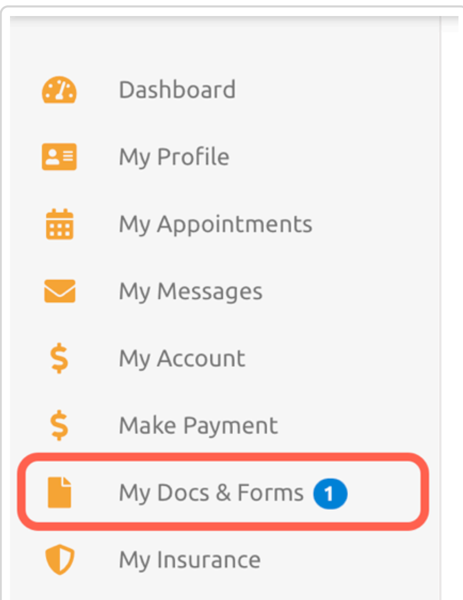
---

View Client Documents

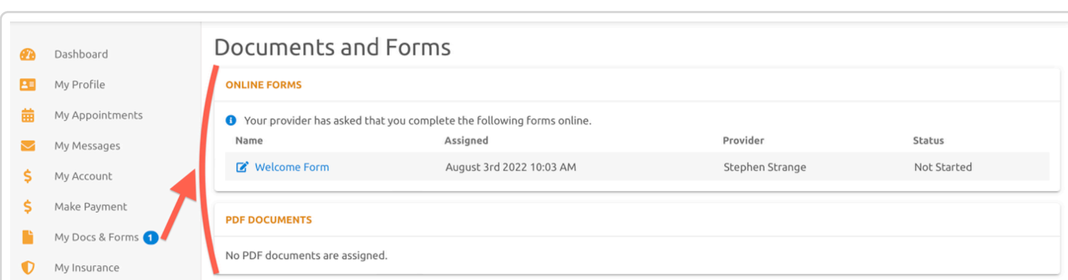
Clients will be shown this when they have either documents assigned to them (not shown in above screenshot):

- Online Forms (//support.therapyappointment.com/article/585-online-forms)
- Standard Client Documents (//support.therapyappointment.com/article/279-standard-client-documents)

⚠️ **Note:** Clients are shown on the left hand menu the number of uncompleted documents, highlighted below:



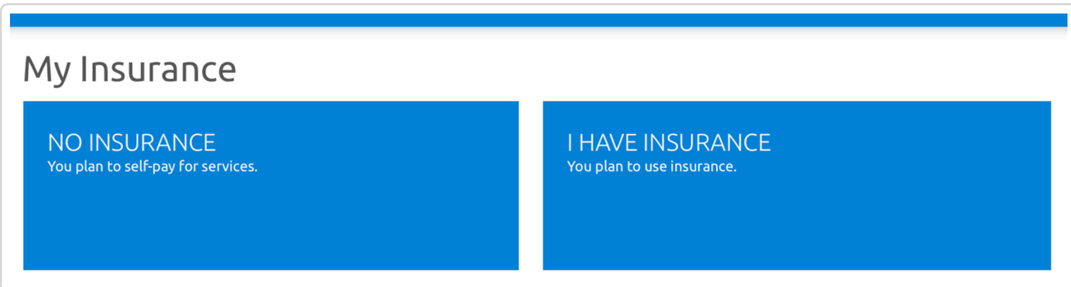
Clicking on **My Docs & Forms** takes them to the page of their available forms:



Insurance Information

Clients can click **My Insurance** (left menu) to manage health insurance details.

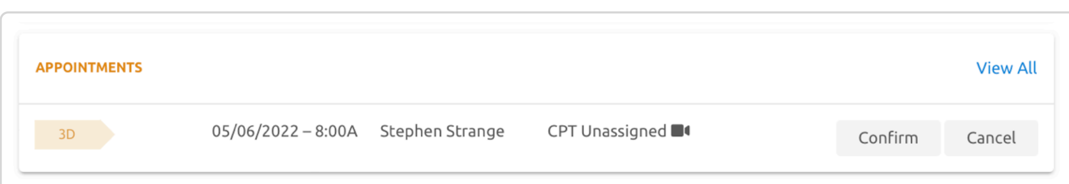
- **No Insurance**: indicates **self or private pay**
- I Have Insurance: allows you to **include health insurance** information (sent to staff to review in client profile under **Primary Insurance** section)
    - Complete the required insurance items within, then click **Save** button at the bottom



⚠️ **Note:** want to collect this information during client registration (clients created either self-registered or by staff)? Please check this article out: Client registration process (//support.therapyappointment.com/article/569-client-self-registration-in-2-0)

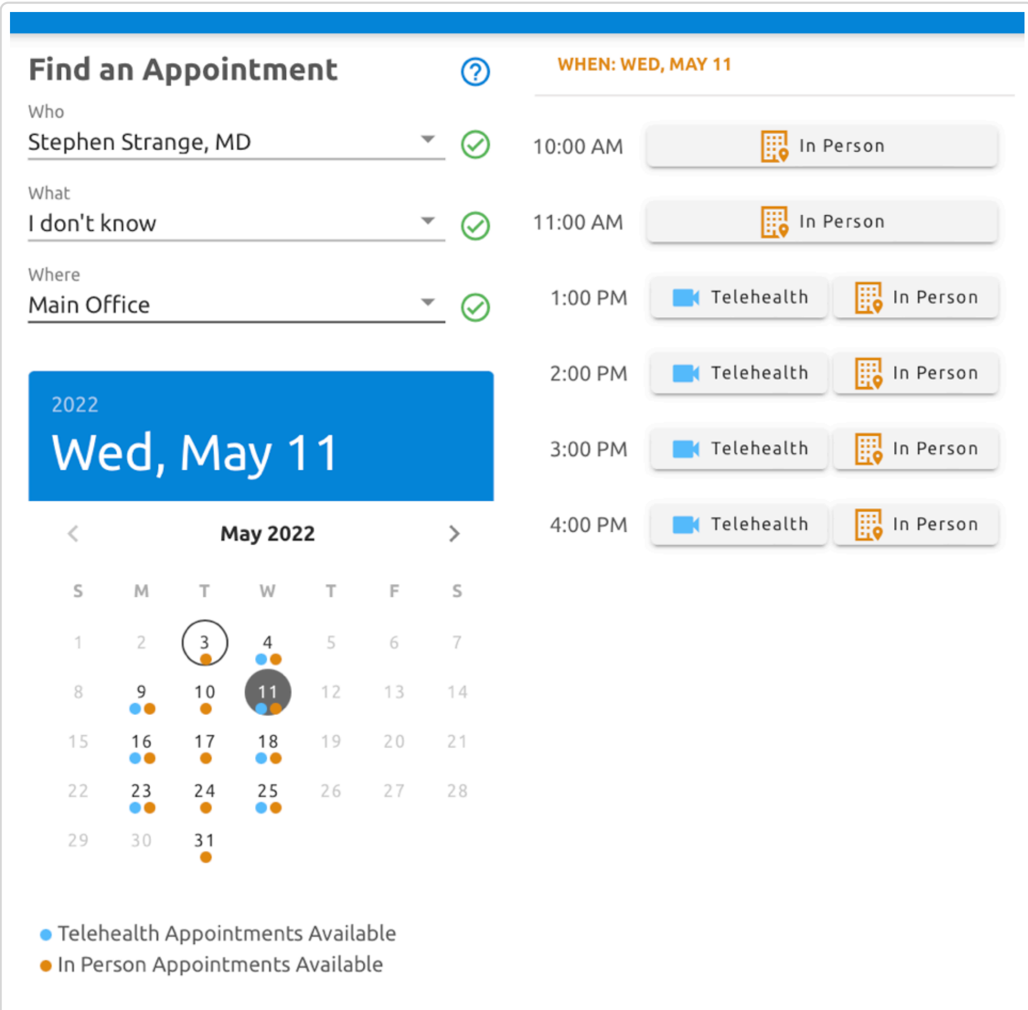
Schedule & View Appointments

Upcoming scheduled appointments are easily viewed from the dashboard in the bottom section.



If the provider has offered self-scheduling access, creating an appointment is easily available within the client portal.

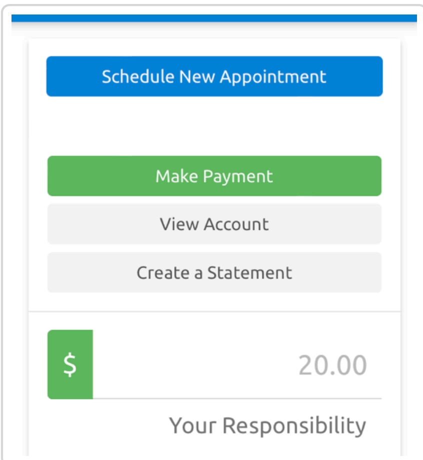
- From the Dashboard, clients can self-schedule by clicking the button **Schedule New Appointment** (top right)
- The system will then show clients available dates & times based on provider availability, similar to below:



⚠️ **Note:** Having an issue with clients **not being able to schedule**? Please first check our most common causes to this, article here: Client Self-Scheduling - Common Issues (//support.therapyappointment.com/article/148-client-self-scheduling-common-issues)

Your Responsibility / Balance

The client account balance appears within the **Balance** section on the client's right hand menu of the Dashboard:



(Shown including ability to make a payment, view account [billing], and an ability to create a statement)

To view additional Account History and Payments made, click the View Account button here, or the left menu option **$ My Account**

Making a Payment

⚠️ **Note:** To make a client payment online, an owner or manager must integrate payment card processor details (under **Practice Settings** > **Billing & Insurance** > **Payment Processing**)

- From the portal Dashboard, select to **Make Payment**

Alternatively:

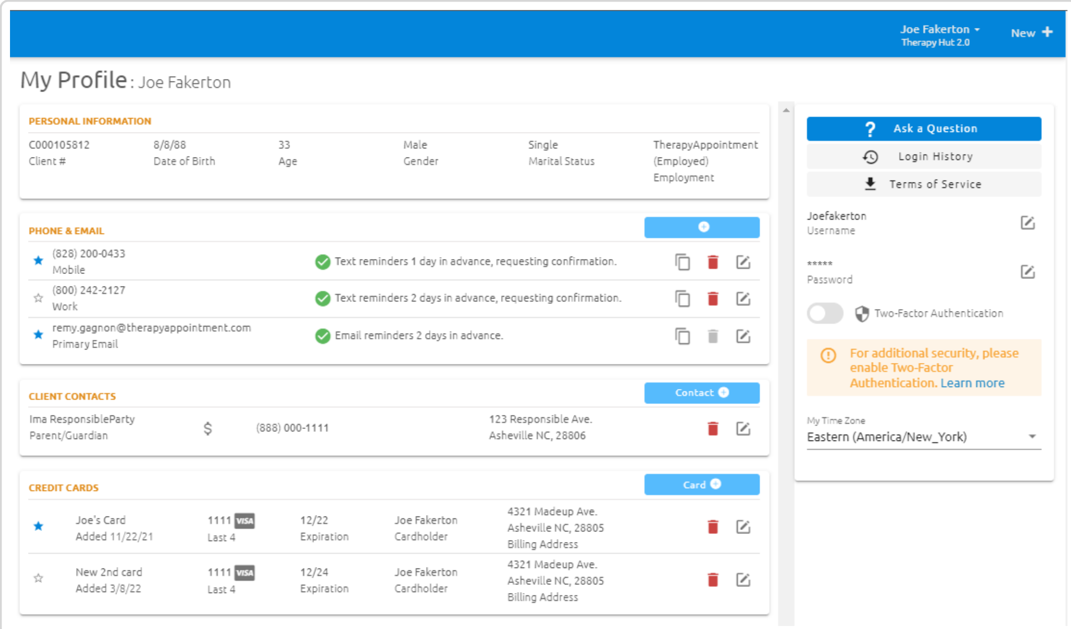
- Click **$ Make Payment** (left menu)
- If needed, adjust payment amount, then either enter card details or use a

saved card on file to make a payment, it's that easy!

Client Portal : Menu Options

⚙️ My Profile

- The profile allows clients to update and edit *most* demographics and settings for their account.
- Namely, they can edit:
  - Phone Number
  - Email
  - Reminder Settings
  - Contacts
  - Credit Cards on File
  - As well as: View/Change Username, Password Reset, View Login History, View/Download Terms of Service, and Ask a Question to a scheduler/biller staff member, or one of their providers.
- This is similar to the client **Profile** view from the staff side, example client profile shown below:



My Appointments

- This section shows all upcoming appointments for a client.
- They can also confirm and cancel appointments based on the provider's allowed settings, configurable in a provider's **My Profile** area.
- They can also self schedule an appointment either from here or the **Dashboard**

My Messages

This shows a list of messages that clients can view and reply to from any staff members

Clients can send a message to their provider.

> **Note**: Need to reach out to a billing or scheduler designated by their settings?
> This article covers that process: Ask a Scheduler or Biller

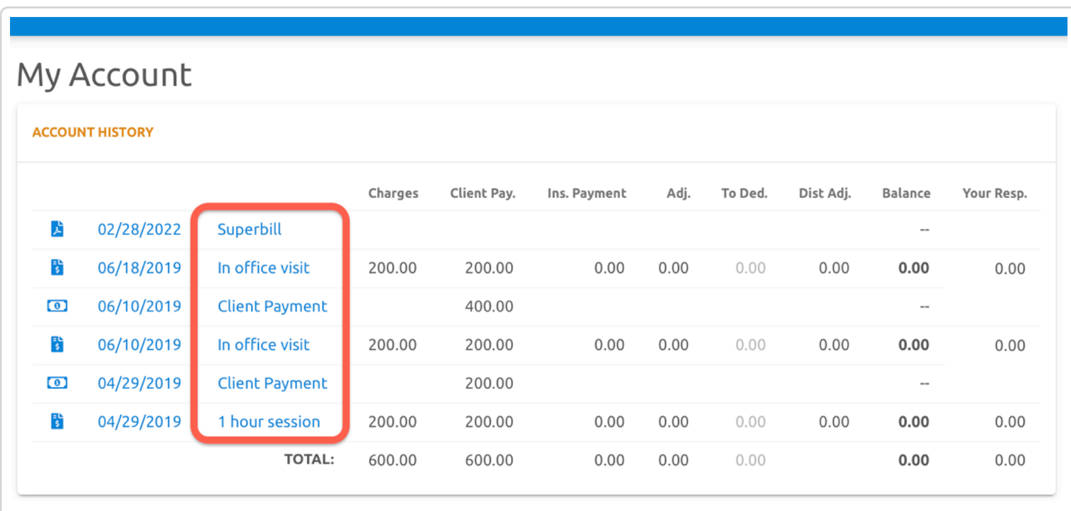
(//support.therapyappointment.com/article/605-ask-a-scheduler-or-biller)

💵 My Account

This allows clients to perform the following:

- View and print receipts for payments made
- View and print (or save) **Superbills**, **Flex Spending Statements**, as well as standard **Statements**
- Make a payment

This view is similar to their **Billing** tab in their profile from the staff side, without the ability to edit:

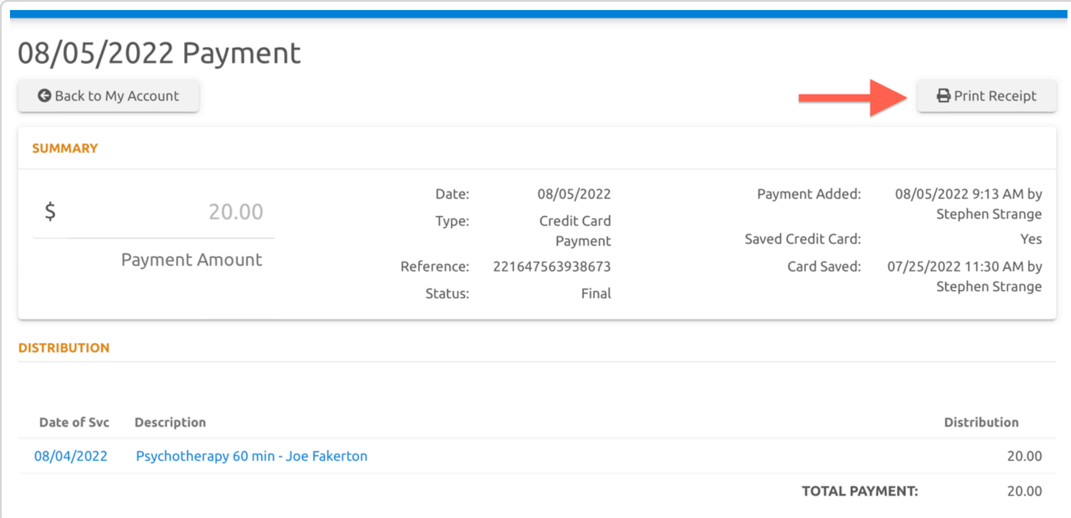


My Account

ACCOUNT HISTORY

Date	Description	Charges	Client Pay.	Ins. Payment	Adj.	To Ded.	Dist Adj.	Balance	Your Resp.
02/28/2022	Superbill							--	
06/18/2019	In office visit	200.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00
06/10/2019	Client Payment		400.00					--	
06/10/2019	In office visit	200.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00
04/29/2019	Client Payment		200.00					--	
04/29/2019	1 hour session	200.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00
	TOTAL:	600.00	600.00	0.00	0.00	0.00		0.00	0.00

Payment Receipt:



💵 Make Payment

This allows clients to make a payment on their account.

They can specify the amount paid, and opt to either enter a new card on file, or use a card already saved on file within their profile.

📄 My Docs & Forms

This allows clients to complete any assigned:

- Online Forms (//support.therapyappointment.com/article/585-online-forms)
- Standard Client Documents (//support.therapyappointment.com/article/279-standard-client-documents)

💳 My Insurance

This allows clients to input their insurance information, or specify they are a private pay client without any insurance.

Last updated on August 8, 2022

RELATED ARTICLES

- 2.0 Support Center (/article/450-2-0-support-center)
- Client Portal Website Linking (/article/273-client-