

## 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:

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## 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

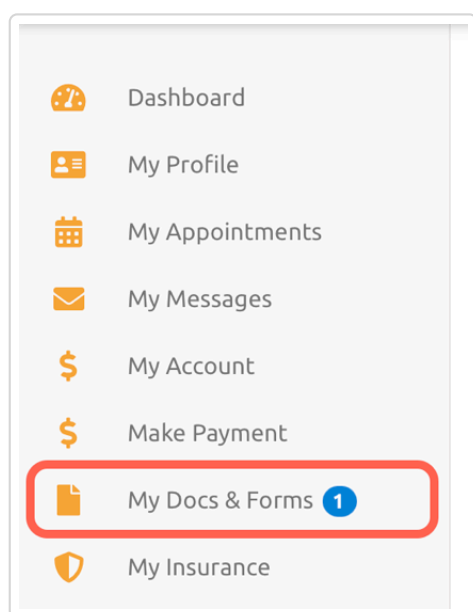
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## View Client Documents

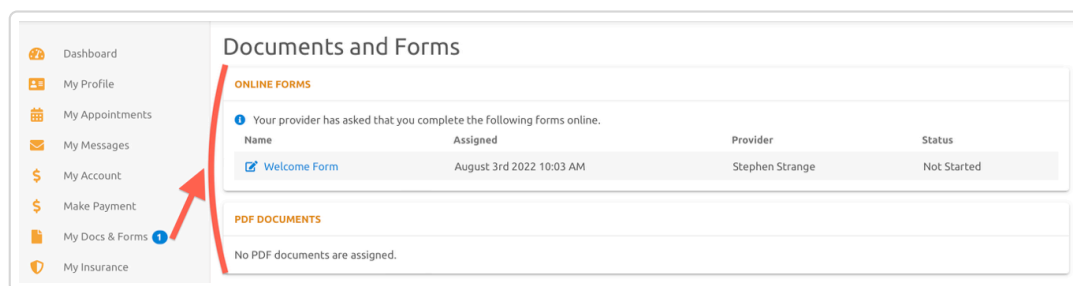
Clients will be shown this when they have either documents assigned to them (not shown in above screenshot):

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

### My Insurance

**NO INSURANCE**  
You plan to self-pay for services.

**I HAVE INSURANCE**  
You plan to use insurance.

 **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](https://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.

APPOINTMENTS

View All

3D

05/06/2022 – 8:00A Stephen Strange CPT Unassigned

Confirm Cancel

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:

## Find an Appointment ?

WHEN: WED, MAY 11

Who  
Stephen Strange, MD ✓

What  
I don't know ✓

Where  
Main Office ✓

2022  
Wed, May 11

May 2022

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

● Telehealth Appointments Available  
● In Person Appointments Available

10:00 AM In Person

11:00 AM In Person

1:00 PM Telehealth In Person

2:00 PM Telehealth In Person

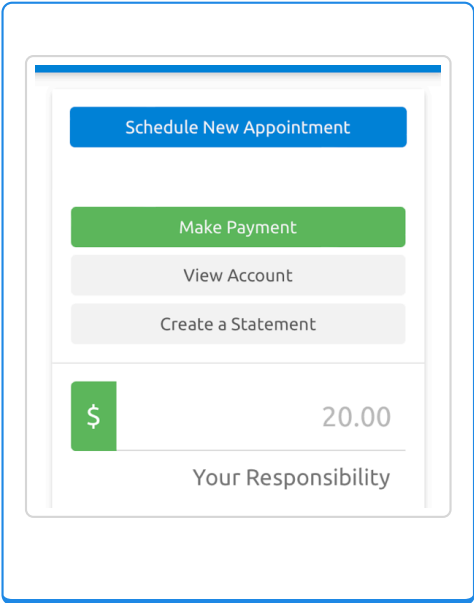
3:00 PM Telehealth In Person

4:00 PM Telehealth In Person

**⚠ 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  
 (<https://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!

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## 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:

Joe Fakerton

TherapyHut 2.0

New +

My Profile: Joe Fakerton

PERSONAL INFORMATION

C000105812 Client #	8/8/88 Date of Birth	33 Age	Male Gender	Single Marital Status	TherapyAppointment (Employed) Employment
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PHONE & EMAIL

★ (828) 200-0433 Mobile	✓ Text reminders 1 day in advance, requesting confirmation.	
☆ (800) 242-2127 Work	✓ Text reminders 2 days in advance, requesting confirmation.	
★ remy.gagnon@therapyappointment.com Primary Email	✓ Email reminders 2 days in advance.	

CLIENT CONTACTS

Ima ResponsibleParty Parent/Guardian	\$ (888) 000-1111	123 Responsible Ave. Asheville NC, 28806	
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CREDIT CARDS

★ Joe's Card Added 11/22/21	1111 Last 4	12/22 Expiration	Joe Fakerton Cardholder	4321 Madeup Ave. Asheville NC, 28805 Billing Address	
☆ New 2nd card Added 3/8/22	1111 Last 4	12/24 Expiration	Joe Fakerton Cardholder	4321 Madeup Ave. Asheville NC, 28805 Billing Address	

Ask a Question

Login History

Terms of Service

JoeFakerton

Username

\*\*\*\*\*

Password

☐
☒ Two-Factor Authentication

For additional security, please enable Two-Factor Authentication. [Learn more](#)

My Time Zone

Eastern (America/New\_York)

## 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](#)

<https://support.therapyappointment.com/article/348-client-portal-overview#myappointments>

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([//support.therapyappointment.com/article/605-ask-a-scheduler-or-biller](https://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									
		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
	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
	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
TOTAL:		600.00	600.00	0.00	0.00	0.00		0.00	0.00

## Payment Receipt:



08/05/2022 Payment

Back to My Account


Print Receipt

SUMMARY

\$ 20.00	Date: 08/05/2022	Payment Added: 08/05/2022 9:13 AM by Stephen Strange
Payment Amount	Type: Credit Card Payment	Saved Credit Card: Yes
	Reference: 221647563938673	Card Saved: 07/25/2022 11:30 AM by Stephen Strange
	Status: Final	

DISTRIBUTION

Date of Svc	Description	Distribution
08/04/2022	Psychotherapy 60 min - Joe Fakerton	20.00
TOTAL PAYMENT:		20.00

## 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](https://support.therapyappointment.com/article/585-online-forms))
- Standard Client Documents ([//support.therapyappointment.com/article/279-standard-client-documents](https://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-



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