Client Portal Guide

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

Home

Getting started in your client portal can feel a bit overwhelming! Start here and review the rest. Here you have an overview of your appointments, as well as the ability to schedule a new appointment or make payments.

My Profile

Managing and accessing important details, such as reminders, saved credit cards, login credentials, and contacts. Find by clicking your name (top right) then **My Profile**.

Forms

Accessing, completing, and viewing documents and forms from your client portal is simple within **Forms** (left menu)

My Messages

Your portal inbox messages and attachments to providers and staff are both accessed and managed within your messages (top right messages icon)

Billing

Access accounting & billing related information like balance details, payment history, make a payment, print or view receipts, and statements all within **Billing** (left menu).

Insurance

Review or add insurance details or changes under **Insurance** (left menu).