therapyappointment

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**.

My Docs & Forms

Accessing, completing, and viewing documents and forms from your client portal is simple from within **My Docs & Forms**.

My 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, make a payment, print or view receipts, and statements all within **My Account**.

My Insurance

Review and manage insurance details or changes: including insurance information as well as private pay under **My Insurance**.