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Quick Start Guide

Welcome to SimplePractice! 98% of customers who completed these **4 steps** are now running their practices more efficiently.

1. Explore and test SimplePractice features

Gain confidence in using your SimplePractice account by completing these tasks.

PRO TIP: Explore our Help Center to learn more about features that you can use to optimize your practice.

PRACTICE SETTINGS

☐ Make sure to meet our **browser and system requirements**

☐ Enter your **practice information**

☐ Add **additional team members**

COMMUNICATION SETTINGS

☐ Get familiar with the **Client Portal**

☐ Enable **Secure Messaging**

☐ Conduct a test **Telehealth** session

☐ Set up free **client reminders**

2. Customize your account

Tailor your account to fit your unique practice needs. **Enter real clients** into the system and **set up your documentation**.

PRO TIP: Make sure to gather your client list, bank account information, and practice website login before moving through steps 2–3.

CLIENT LIST

☐ **Import your client list** if you are switching from another EHR

PAPERLESS DOCUMENTATION

☐ Customize your **progress note templates and intake forms**

☐ Add all **services and products** you offer

☐ Add your **practice logo** to your billing documents

☐ Edit your **consent document templates** to include your practice's name

3. Optimize your workflow

Now, **set automations** to make your workflow even easier. These powerful tools provide flexibility and control, allowing you to choose what works for your practice.

Once you've completed steps 1–3, you're ready to choose your subscription plan and test your knowledge using the **Onboarding Activity** found on the next page.

PRO TIP: Browse our recorded **online classes** and attend the live **Client Billing and Automation class**.

BILLING

- [ ] Set up **Online Payments**
- [ ] Set up **AutoPay**
- [ ] Learn about **billing documents**
- [ ] Attend the **Insurance Billing class**

SCHEDULING

- [ ] Set up the **Google calendar sync** or **1-way iCal or Outlook calendar sync**
- [ ] Enable **Online Booking**
- [ ] Set up your **Availability calendar**
- [ ] Add the **Booking Widget** to your practice website

MOBILE APP

- [ ] Download our highly rated **mobile app**

4. Choose your SimplePractice subscription!

You've invested your time wisely and are ready to make the most of your SimplePractice account. **Review your subscription options** and choose the right package for your needs.

PRO TIP: Refer a friend. If they sign up for a paid account, you both get a **$50 credit**!

UNLOCKED AFTER SUBSCRIBING:

The SimplePractice Community on Facebook

In our very active Facebook group, 6,000+ customers (and our team) ask and answer questions daily.

Join now

The SimplePractice Community Forum

Add requests or vote on feature updates. We're always getting better based on feedback from customers like you.

Browse the Forum

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What do my clients see?

Client care is your priority, and professionalism is crucial to gaining trust. To see firsthand your clients' experience with SimplePractice, complete these activities using your **test client, Jamie Appleseed**—they're automatically set up with your contact information.

Jamie Appleseed

The Client Portal

- ☐ **Invite Jamie** to the Client Portal by editing their client profile
- ☐ **Log in** from their email invitation
- ☐ **Share intake forms** with Jamie
- ☐ Fill out and digitally sign the **intake and demographics forms**
- ☐ **Request** an appointment
- ☐ **Confirm** the appointment for Jamie
- ☐ Send a **Secure Message** to and from Jamie

Telehealth

- ☐ Download the **Telehealth by SimplePractice** mobile app
- ☐ **Create an appointment** for Jamie and set the location as "Telehealth: Video Office"
- ☐ Click **Share link** to email Jamie
- ☐ **Join video call** as Jamie from the emailed link on your mobile phone
- ☐ Click **Start video call** from your calendar on your desktop

Appointment Reminders

- ☐ Enter your **phone number** and enable SMS text reminders for Jamie
- ☐ Add an appointment for Jamie that **occurs in 24 hours**

Billing

- ☐ **Add an appointment** with Jamie from your calendar and edit the session fee
- ☐ Add **a cash payment** for Jamie from their client profile side panel
- ☐ Create a **Statement** for Jamie from their Billing tab in their client profile
- ☐ Review Jamie's **Billing & Payments** tab in the Client Portal

Need help?

Make sure you've completed steps 1–3 of this guide, and refer to this **cheat sheet** in our Help Center.

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