ONBOARDING ACTIVITY

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.

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.