

 simplepractice

LEARNING

3

How to Request Appointments

GETTING STARTED GUIDE: FOR CLIENTS

Online Booking

with  simplepractice

Online Booking lets you request, cancel, or reschedule appointments with your clinician.

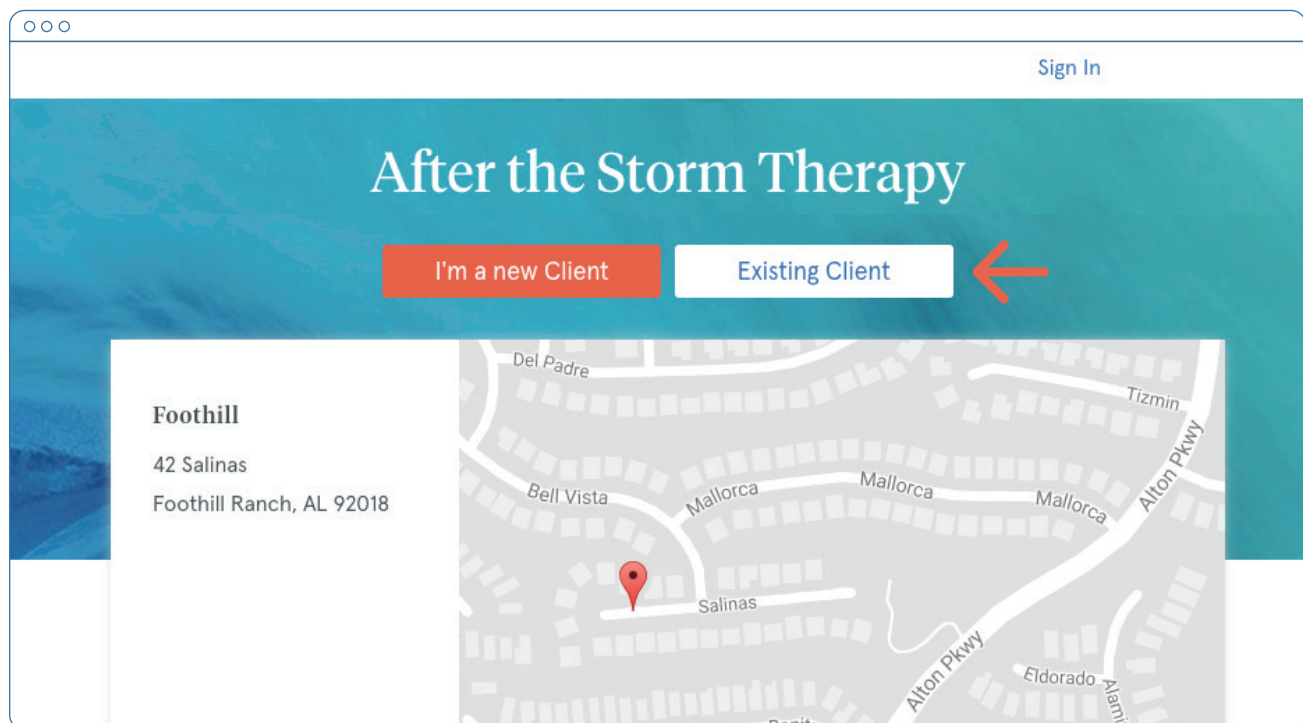
SECTIONS:

1. Request a session
2. Cancelling requests

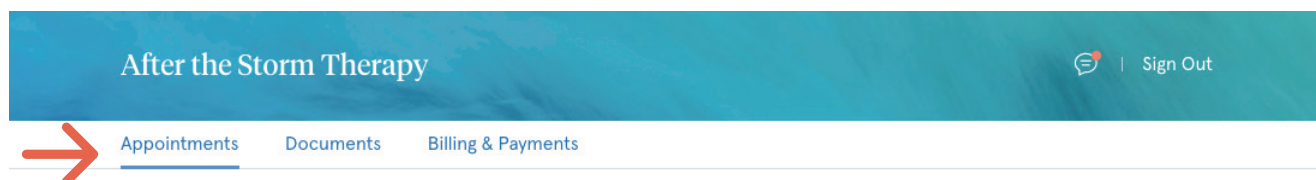
REQUEST A SESSION

The following steps will show you how to request appointments.

1. Go to your clinician's Client Portal and click Existing Client to log in. (The New Client button is only for clients who have never logged into the Client Portal before).

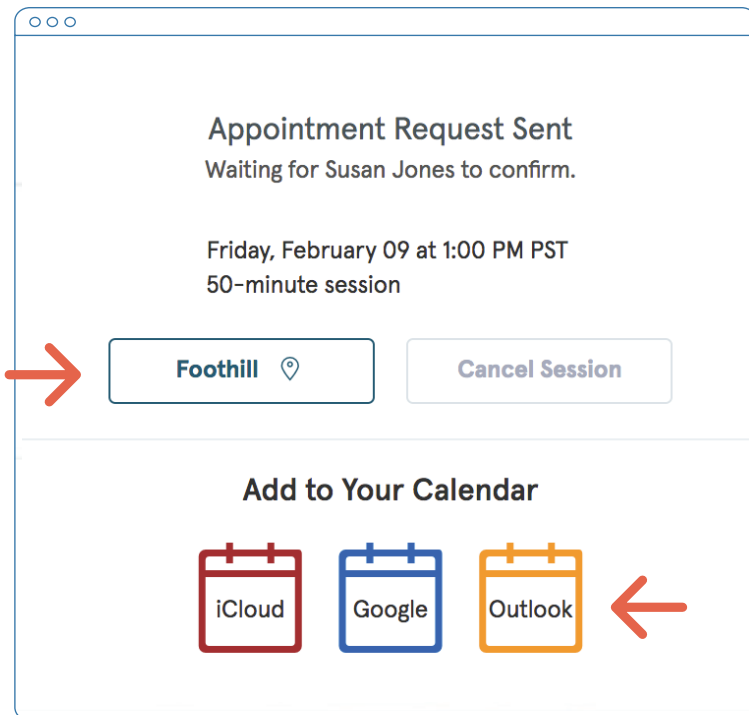


2. Navigate to the appointments tab. (This may already be selected by default after you log in).



3. Select your **clinician** (if there are multiples) and your preferred **office location** from the dropdown menus.
4. Select your **service**. What type of appointments do you see your clinician for?
5. Click one of the **available** boxes to see specific times. You'll see that these boxes are split into morning (up until 12 noon), and afternoon & evening (12pm onwards). Clicking the arrows on the top left and right will let you move from week to week.
6. Click on the **time** that you'd like to request.

Note: To go back to the previous screen with all of the days, click the back button (top left).

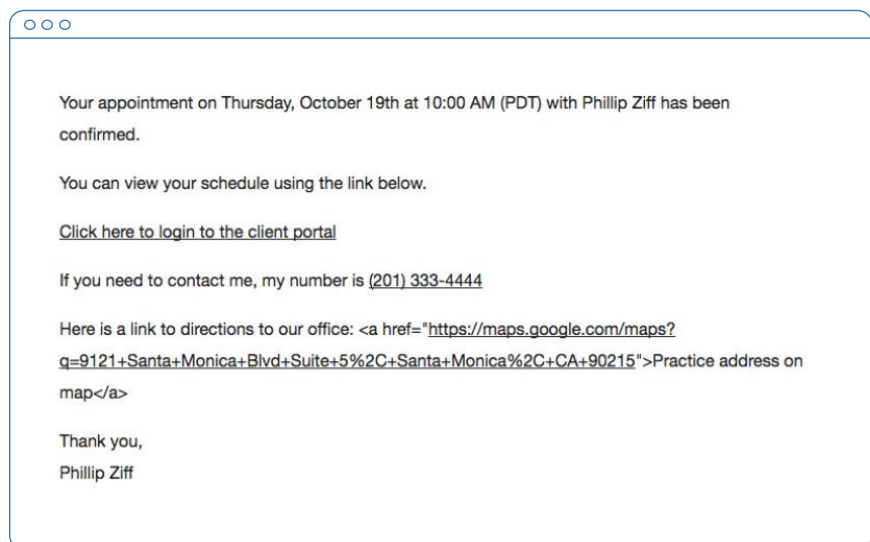


7. Your appointment request is now confirmed.

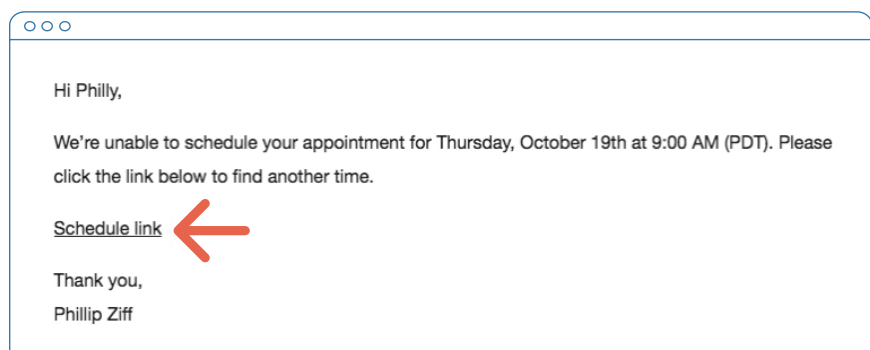
Note: This doesn't mean that the request has been accepted by your clinician yet.

You can click to view a map of the office location, or add the session to your calendar.

8. When your appointment request is accepted, you'll receive an email confirming the session:

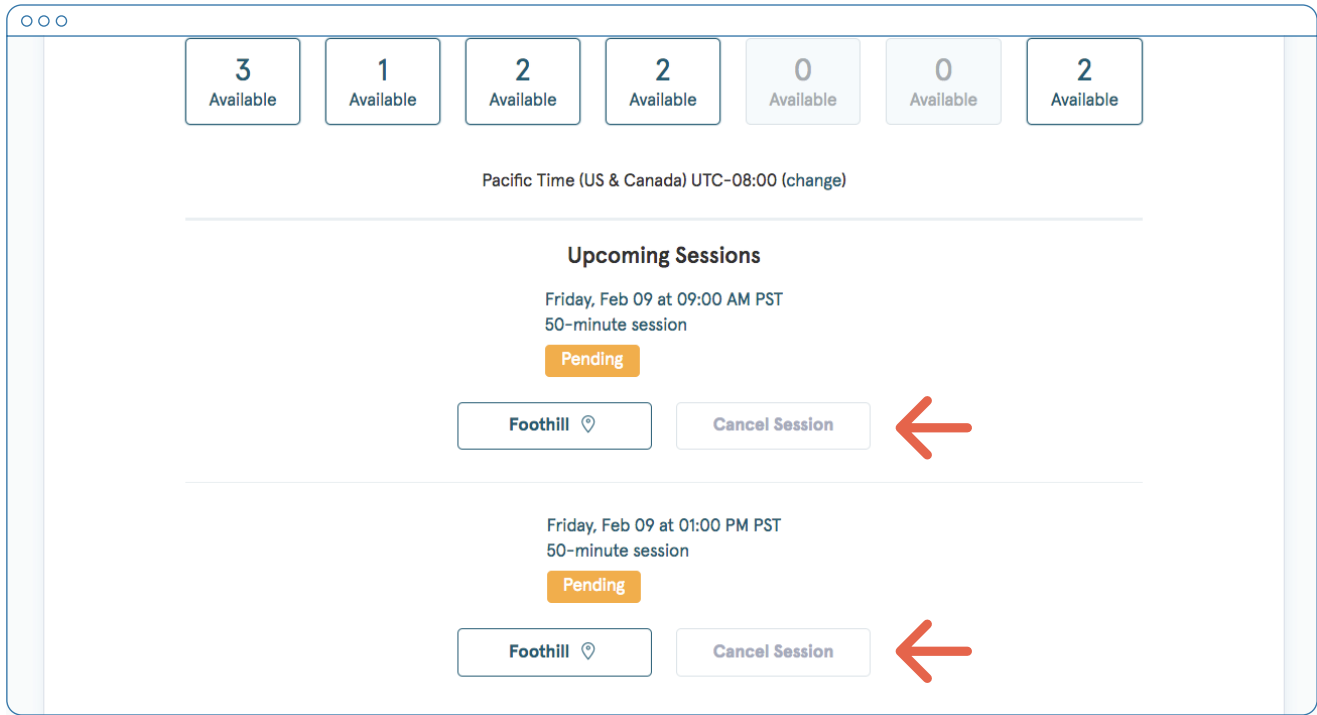


9. If they cannot see you at that time, you'll receive an email with a link to reschedule. Click the link to go back to your client portal and request a new session.



VIEWING AND CANCELLING REQUESTS

You'll see a list of your upcoming requests and confirmed or denied appointments on the appointments page of your client portal, below the calendar.



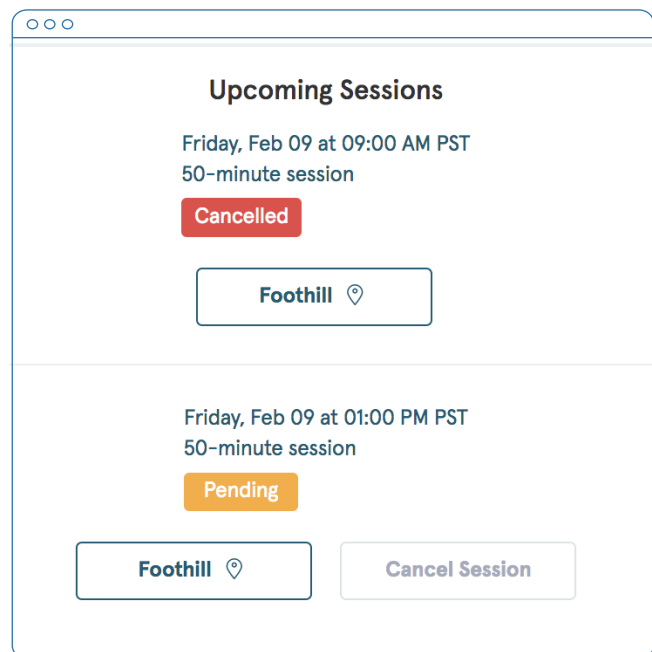
The screenshot shows a client portal interface with a top navigation bar containing seven buttons labeled '3 Available', '1 Available', '2 Available', '2 Available', '0 Available', '0 Available', and '2 Available'. Below this is a time zone indicator: 'Pacific Time (US & Canada) UTC-08:00 (change)'. The main content area is titled 'Upcoming Sessions' and lists two sessions:

- Friday, Feb 09 at 09:00 AM PST, 50-minute session, Pending. Below this session are two buttons: 'Foothill' with a location pin icon and 'Cancel Session'. A red arrow points to the 'Cancel Session' button.
- Friday, Feb 09 at 01:00 PM PST, 50-minute session, Pending. Below this session are two buttons: 'Foothill' with a location pin icon and 'Cancel Session'. A red arrow points to the 'Cancel Session' button.

Click **Cancel Session** to cancel your appointment request.

Note: You'll only be able to cancel this way according to your clinician's cancellation policy. If you attempt to cancel too close to a session, or if they don't offer online cancellation, you'll receive a message to call their office to cancel.

Once your session is cancelled, you'll see this reflected on your appointments page in the Client Portal. Use this page to check the status of your requests, cancel sessions, or schedule new ones!



The screenshot shows the same client portal interface as above, but with the following changes:

- The first session (Friday, Feb 09 at 09:00 AM PST, 50-minute session) now has a red 'Cancelled' button instead of a 'Pending' one. The 'Foothill' button remains below it.
- The second session (Friday, Feb 09 at 01:00 PM PST, 50-minute session) remains 'Pending' with 'Foothill' and 'Cancel Session' buttons below it.



Congratulations!

You're now ready to start managing appointments in your Client Portal.