

How to Join a Telehealth Session as a TherapyPortal User

Telehealth sessions allow you and your provider to meet in the comfort and convenience of your own homes. Any device with a camera, microphone, compatible web browser, and Internet access is suitable for a telehealth session. All calls use peer-to-peer connections with end-to-end encryption for maximum privacy and security.

Before you get started:

- Be sure that you're using an up-to-date web browser, such as the latest version of Google Chrome (<https://www.google.com/chrome/>), Microsoft Edge (<https://www.microsoft.com/en-us/edge>), Apple Safari (<https://support.apple.com/en-us/HT204416>), or Mozilla Firefox (<https://www.mozilla.org/en-US/firefox/>). Please note that you cannot join telehealth sessions using Internet Explorer.
- Make sure that you're connected to a strong, secured Wi-Fi signal. If you're joining a telehealth session on your phone, connect to Wi-Fi instead of using cellular data, if possible.

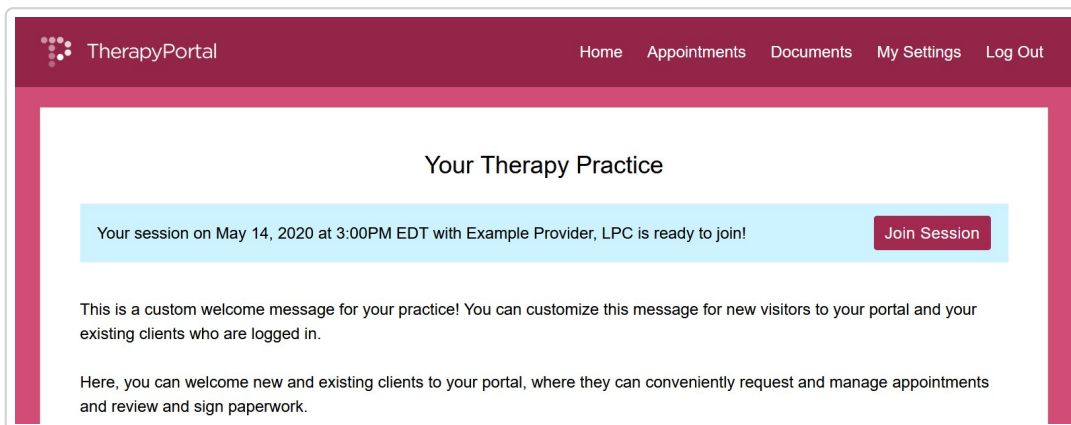
Quick Tip: You can check the speed and performance of your Internet connection using FAST.com (<https://fast.com/>). For the best quality audio and video, your download and upload rates should be 1.5 Mbps or higher.

- Close any applications or browser tabs that you don't need right now. This allows your device's processing power to be dedicated to maintaining a high-quality video call.
- Grab a pair of headphones to use for your session. Using headphones helps to prevent voice echo.

- Have a phone number you can use to call your provider in case you get disconnected.

To join a telehealth session:

- Log in to your practice's portal.



- Any telehealth sessions that are ready for you to join will appear at the top of your home page. You have the option to join a session for any recent or upcoming appointments scheduled with your practice.
- Click the **Join Session** button for your appointment.
- Your browser will prompt you to share access to your camera and microphone. Click **Allow**.
- In the telehealth waiting room, select the **Camera** and **Microphone** you want to use for your session. You should see a preview of your video and an audio meter that responds to your voice.
- When you're ready to join your session, click the **I'm Ready** button.
- Once you indicate that you're ready for your session, you'll connect immediately with your provider if they're ready to go. If not, a waiting screen will appear. Please remain on this screen until your provider joins the session.

In a telehealth session, your video will appear in the upper left corner of your browser, and your provider's video will appear larger in the middle of the browser. You can disable your camera, mute your microphone, and end the session using the buttons in your control tray.

When a session ends, you'll be taken back to your home page. If you end the session by mistake, you may rejoin the session. To rejoin a session, click the **rejoin the session** link in the banner that appears on your home page. Both you and your provider must choose to rejoin in order to reconnect in the telehealth session.



Still need help? Contact Us (<https://www.therapynotes.com/contact/>)

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Request and Manage Appointments as a TherapyPortal User

While some practices do not allow online scheduling, many TherapyNotes practices use TherapyPortal to allow their clients to conveniently request and manage appointments.

If your practice uses TherapyPortal, they will inform you how to access the portal. In many cases, they will send you an email invitation to join the portal, or they may include a link to the portal on the practice's website.

If you are unsure how to access the portal, please talk to the staff at your practice.

Each practice uses TherapyPortal differently, so be aware that your practice may choose not to take advantage of all portal features.

Request Appointments

Many practices require clients to be logged in to the portal in order to request appointments.

Request an appointment on TherapyPortal with an existing portal account:

- Log in to your practice's portal.
- Click the **Request Appointment** button.

Request Appointment

This online form is a convenient way to schedule appointments; however, please contact us by phone if you need any assistance.

Client:

Client Status: I am a new client I am an existing client

Appointment Type:

Location:

Clinician:

- For **Client Status**, select whether you are a new client or an existing client. If you are an existing client with at least one previous appointment, the Client Status field will auto-populate with "I have had a previous appointment at this practice".
- From the **Appointment Type** dropdown, select whether you are scheduling a Therapy appointment or a Medication Management appointment, if applicable. New clients may only schedule Therapy and Medication Management *Intakes*, while existing clients may only schedule Therapy and Medication Management *Sessions*.
- If your practice has multiple locations, select your preferred location from the **Location** dropdown.
- From the **Clinician** dropdown, select your preferred clinician or search for **Any Available Clinician**.
- Click the **View Available Times** button.

Request Appointment

Find a Therapy Intake (usually approximately 60 minutes) with [redacted] at any available location.

[Previous](#)

Week of 6/13/2022

Mon 6/13	Tue 6/14	Wed 6/15	Thu 6/16	Fri 6/17	Sat 6/18	Sun 6/19
8:00AM	8:00AM	8:00AM	8:00AM	8:00AM		
8:30AM	8:30AM	8:30AM	8:30AM	8:30AM		
9:00AM	9:00AM	9:00AM	9:00AM	9:00AM		
9:30AM	9:30AM	9:30AM	9:30AM	9:30AM		
10:00AM	10:00AM	10:00AM	10:00AM	10:00AM		
10:30AM	10:30AM	10:30AM	10:30AM	10:30AM		
11:00AM	11:00AM	11:00AM	11:00AM	11:00AM		
11:30AM	11:30AM	11:30AM	11:30AM	11:30AM		

- Select your preferred appointment time.
- Review your appointment request details and click the Submit Request button

Tip: If you select an appointment time that is in the near future, you may be unable to schedule the appointment through TherapyPortal. Please contact your practice to schedule such appointments.

You will receive an email confirmation once your appointment request is approved by the practice. If your request is declined, you will be contacted by the practice directly to reschedule. Declined appointment requests will not appear in your appointment list.

Request an appointment on TherapyPortal without a portal account:

Some practices allow clients to request appointments without creating a portal account or logging in. If this is the case with your practice, you may follow these instructions to request an appointment without

logging in.

- Visit your practice's portal.
- Click the **Request Appointment** button.
- Follow the steps above for configuring the details of your appointment.
- Click the **Continue Without Signing In** button.
- Enter your **Name**, **Date of Birth**, **Email**, and **Mobile Phone**. If desired, include a message to the practice.
- Click the **Submit Request** button.

Request Appointment

Preferred Time: June 15, 2022 at 10:00AM [change](#)

Location: Main Office [change](#)

Clinician: Any Clinician Available at This Time

[Sign In To Your Account](#) [Continue Without Signing In](#)

If you have already created a client account, sign in to submit your request to expedite this process. Otherwise, select the option to continue without signing in to submit your request. At your appointment be sure to request an account.

Name:

Date of Birth:

Email:

Mobile Phone:

Message to Practice:

[Submit Request](#) [Cancel](#)

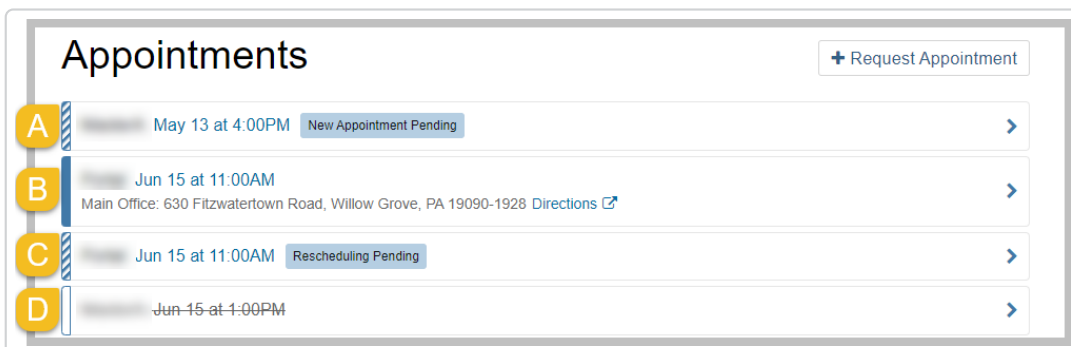
You will receive an email confirmation once your appointment request is approved by the practice. If your request is declined, you will be contacted by the practice directly to reschedule. Be sure to request a portal account at your appointment so that you can manage your upcoming appointments.

View Appointments

With a portal account, you may view and manage any of your existing appointments or pending requests with the practice.

View your upcoming appointments, canceled appointments, and pending requests:

- Log in to your practice's portal.
- Your next confirmed appointment is shown on the homepage. To view your full list of appointments, click the **Manage Appointments** button or click the **Appointments** tab at the top of the page. Confirmed, pending, and cancelled appointments will display slightly differently in the list.



(A) Pending appointment request: Pending new appointment requests appear with a blue and white striped bar and "New Appointment Pending" tag. These appointments have not yet been confirmed by your practice.

(B) Confirmed appointment: Your confirmed upcoming appointments appear on you appointment list with a solid blue bar.

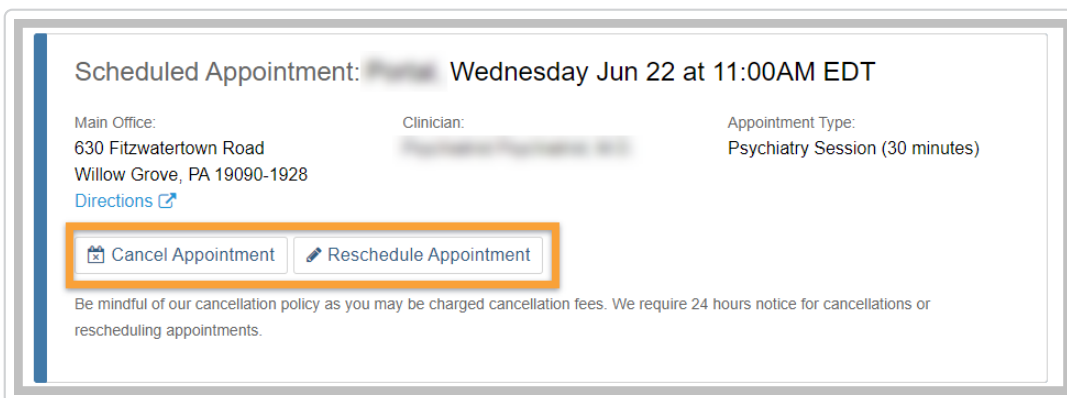
(C) Pending cancellation or reschedule request: Appointments that you have requested to be rescheduled or canceled through the portal appear with blue and white striped bar and a "Rescheduling/Cancellation Pending" tag. These appointments were previously confirmed by your practice, but your practice has not yet reviewed your request to cancel or reschedule.

(D) Canceled appointment: Upcoming appointments that have been canceled appear with a white bar and a strike through the appointment details.

Cancel or Reschedule Appointments

View your upcoming appointments, canceled appointments, and pending requests:

- Log in to your practice's portal.
- Click the **Manage Appointments** button or click the **Appointments** tab at the top of the page.
- Click the appointment you want to cancel.
- To cancel a confirmed appointment, click the **Cancel Appointment** button.



Scheduled Appointment: **[Redacted]** Wednesday Jun 22 at 11:00AM EDT

Main Office: 630 Fitzwatertown Road
Willow Grove, PA 19090-1928
[Directions](#)

Clinician: **[Redacted]**

Appointment Type: Psychiatry Session (30 minutes)

[Cancel Appointment](#) [Reschedule Appointment](#)

Be mindful of our cancellation policy as you may be charged cancellation fees. We require 24 hours notice for cancellations or rescheduling appointments.

- To cancel a pending request, click the **Cancel This Request** button.

New Appointment Requested: ██████████ Friday May 13 at 4:00PM EDT

Pending Approval: This request was submitted on May 11. Please check with the practice before planning to attend.

[Cancel This Request](#)

Main Office: 630 Fitzwatertown Road
Willow Grove, PA 19090-1928
[Directions](#)

Clinician: SupervisorClinician SupervisorClinician, OT

Appointment Type: Therapy Session (30 minutes)

Reschedule a confirmed appointment:

- Log in to your practice's portal
- Click the **Manage Appointments** button or click the **Appointments** tab at the top of the page.
- Click the appointment you want to reschedule.
- Click the **Reschedule Appointment** button.

Request Appointment

This online form is a convenient way to schedule appointments; however, please contact us by phone if you need any assistance.

Client:

Client Status: I have had a previous appointment at this practice.

Appointment Type: Medication Management Session

Location: Main Office

Clinician: ██████████

[View Available Times](#) [Cancel](#)

- Edit the appointment details including **Appointment Type**, **Location**, and **Clinician** as desired.

- Click the **View Available Times** button.
- Select your preferred appointment time.
- Review your reschedule request details and click the **Submit Request** button.



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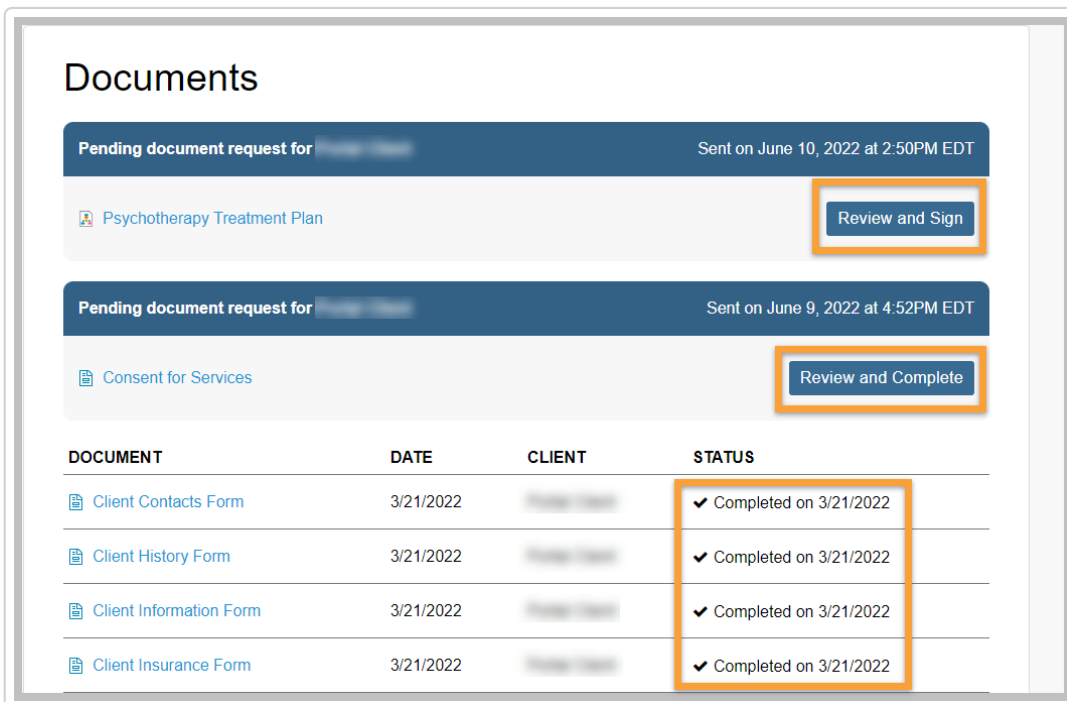
Review or Sign a Document as a TherapyPortal User

Practices who use TherapyNotes may choose to send documents, videos, audio, and more to you through TherapyPortal, allowing you to review and sign documents online without needing to spend time filling out forms in the office.

In order to receive documents from your practice, you must have an account with your practice's client portal.

Locate Documents Your Practice Has Sent to You

- Log in to your practice's portal.
- Pending documents are shown on your homepage. To view all of your pending and completed documents, click the **View Documents** link or click **Documents** at the top of the page.



The screenshot displays the 'Documents' section of a TherapyPortal user interface. It features two pending document requests and a table of completed documents. The pending requests are for a 'Psychotherapy Treatment Plan' (sent June 10, 2022) and 'Consent for Services' (sent June 9, 2022). The table below lists four completed documents, all dated 3/21/2022, with their status marked as 'Completed on 3/21/2022'. Orange boxes highlight the 'Review and Sign' button for the pending document, the 'Review and Complete' button for the pending document, and the 'STATUS' column of the completed documents table.

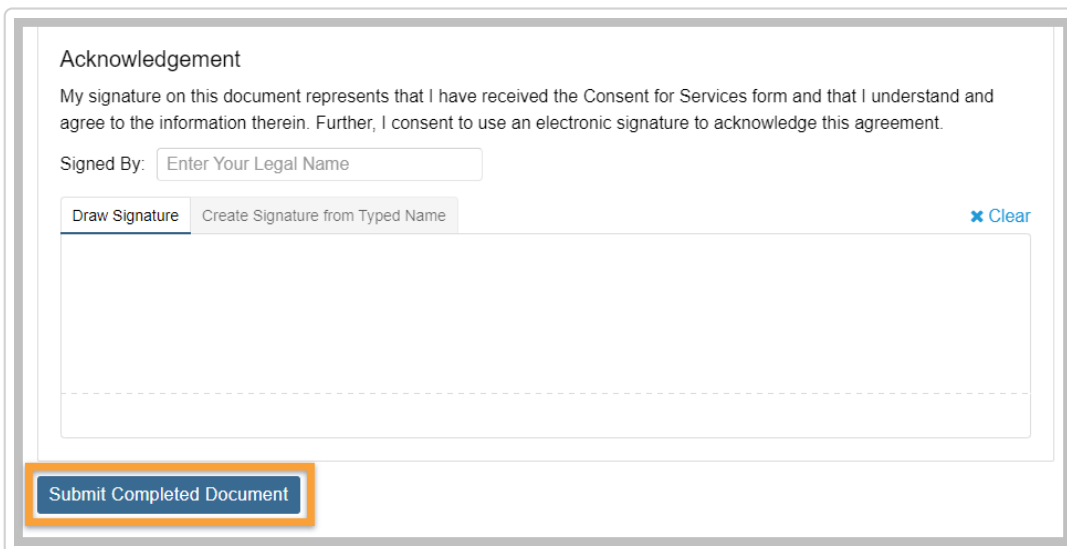
DOCUMENT	DATE	CLIENT	STATUS
Client Contacts Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022
Client History Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022
Client Information Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022
Client Insurance Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022

- Documents that are pending your signature or review are shown

under **Pending Document Requests**. Any document that you have previously reviewed or signed for the practice are shown in the table below pending documents and list a status of "Completed on (date)". To view a document that you've already completed, click on the name of the document.

Review a Document

- From your **Documents** page, click on the **Review and Complete** button next to the name of the document.
- Read the instructions for the request provided by the practice.
- If the document can be displayed in your web browser, review the document directly on the portal. Otherwise, click the link to the document to open and review it.
- After reviewing the document, add your signature, if required, then click the **Submit Completed Document** button.



A screenshot of a web form titled "Acknowledgement". The form contains the following elements: a paragraph of text stating "My signature on this document represents that I have received the Consent for Services form and that I understand and agree to the information therein. Further, I consent to use an electronic signature to acknowledge this agreement."; a "Signed By:" label followed by a text input field containing "Enter Your Legal Name"; two tabs labeled "Draw Signature" and "Create Signature from Typed Name"; a "x Clear" link; a large empty rectangular area for a signature; and a blue button at the bottom left labeled "Submit Completed Document" which is highlighted with an orange border.

Sign a Document

- From your **Documents** page, click on the **Review and Sign** button next to the name of the document.
- Read the instructions for the request provided by the practice.

- If the document can be displayed in your web browser, review the document directly on the portal. Otherwise, click the link to the document to open and review it.
- After you've reviewed the document, click the **Sign Document** button.

Sign: Psychotherapy Treatment Plan

I acknowledge that I have participated in the development of the treatment plan and agree with the goals, objectives, and interventions.

1 Signed By:

2 Draw Signature Create Signature from Typed Name

Jane Smith

3

1) In the **Signed By** field, type your legal name. If you're signing on a mobile device, tap **Next** and rotate your phone to landscape mode.

2) Draw your signature in the area provided, OR select the **Create Signature from Typed Name** tab to generate a signature from the name you entered in the **Signed By** field.

- If you make a mistake when drawing your signature, click the **Clear** link above the drawing area.

3) When you're satisfied with your signature, click the **Apply Signature** button.

Your signature will be recorded in your portal account. You can reference signed documents and their accompanying signatures by clicking on the name of the document in the **Completed Documents** table on your **Documents** page.



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