therapyappointment
you provide the therapy • we provide the rest

TA Client Portal Guide

This helpful guide offers hyperlinks to published articles, focusing on your Client Portal view and quick access points!

Dashboard : Welcome to TherapyAppointment
ACCOUNT SET UP

Portal Dashboard

Getting started in your client portal can feel a bit overwhelming! Understanding your portal Dashboard is a great place to begin.

Your Profile
PERSONAL INFORMATION

Portal My Profile

Managing and accessing important details, such as contacts, saved credit cards, and your login credentials are found within My Profile.

Documents and Forms
PDF DOCUMENTS

Portal Docs & Forms

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

Message Inbox
Inbox 0

Portal Messages

Your portal inbox messages and attachments are accessed and managed within My Messages.

Biographical Information

Portal Bio

Your portal biographical intake form, once assigned, will be indicated in the My Bio section.

My Account
ACCOUNT HISTORY

Portal Account

Locate your account information, including account balance details and payment history, within My Account.

My Insurance

Portal Insurance

Need to set up your portal insurance (or Self-Pay) details? This is managed in the My Insurance section.