Secure Client Portal Features

PracticeQ offers a secure client portal that gives your clients a web interface they can access to exchange messages with you and perform various other tasks, such as scheduling appointments, viewing intake forms, paying for invoices, sharing documents, and more. Below is a review of which options you can enable or disable for your clients to customize the functionality available in your client portal.

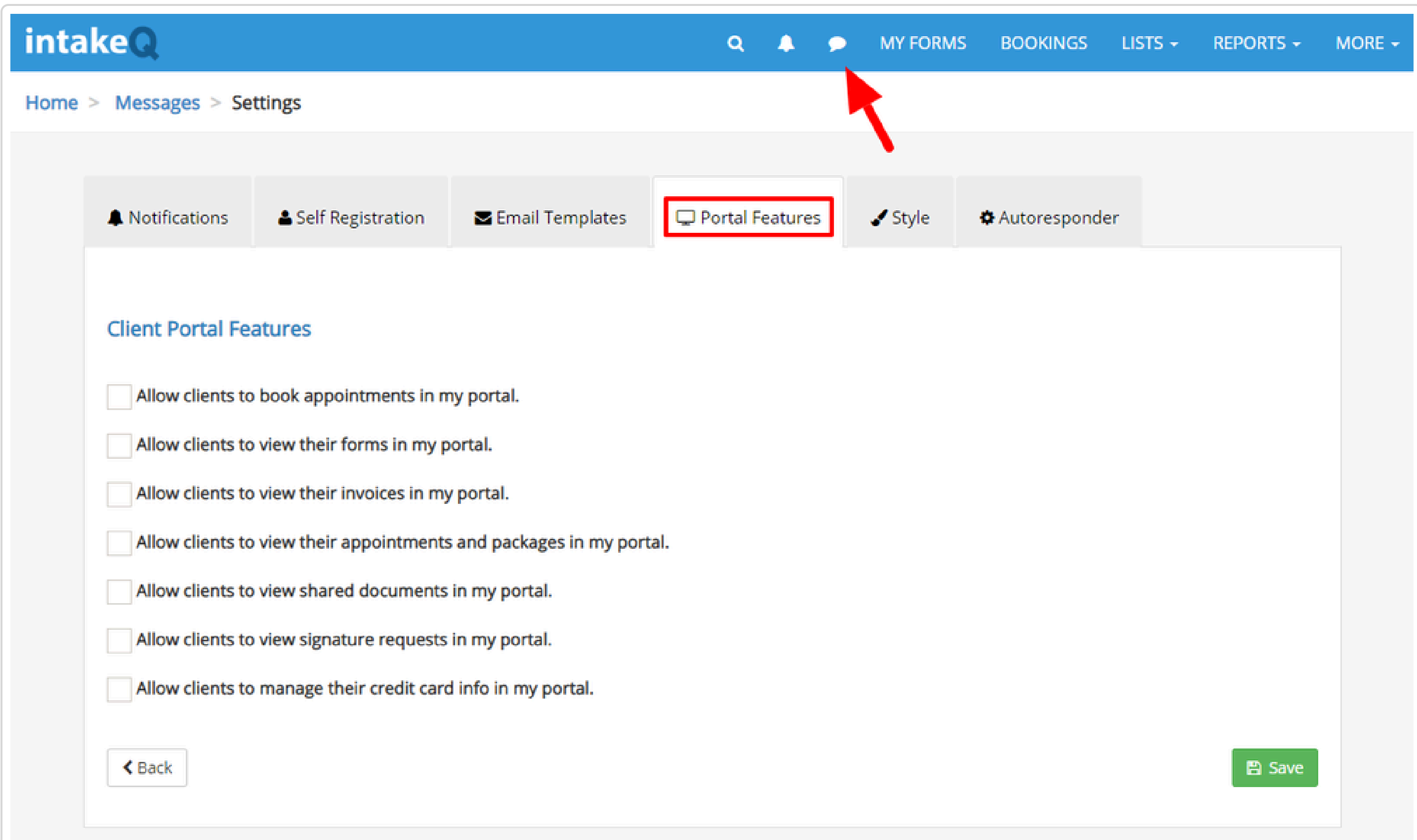
You'll want to ensure you have setup your client portal access controls. You can allow your clients to register themselves, or invite them manually to the portal. For more information on this, see the following articles:

- Inviting Clients to Your Client Portal (//support.intakeq.com/article/171-inviting-clients-to-your-messaging-portal)
- Enable Client Portal Self Registration (//support.intakeq.com/article/178-enable-portal-self-registration)
- *The above video is a brief tour through the portal, its features and settings.*

Portal Settings

To access the options available in your client portal, follow the steps below:

1. Navigate to the secure portal by clicking the **speech bubble icon** in the top blue menu bar.
2. Click on **"Settings"** in the top right corner.
3. Click the **"Portal Features"** tab.



Here you'll find various features you can enable or disable for your client portal, each is described below:

- **Allow clients to book appointments in my portal:** This option will give your clients the ability to schedule appointments directly from the portal. It adds a "Book Now" button that directly opens your booking widget in the portal. For more information on this, see the following article: Enable Your Booking Widget in the Client Portal (//support.intakeq.com/article/196-enable-your-booking-widget-in-your-secure-portal)

- **Allow clients to view their forms in my portal:** This option allows your clients to view intake forms that you've sent to them, as well as any forms they have submitted in the past. For intakes not yet completed, clients will be presented with an option to complete the form, for any they have submitted already they'll be able to open the PDF version of the form. For more information on sending forms to clients using the client portal, see the following article: How to Send Forms Using the Client Portal (//support.intakeq.com/article/174-how-to-send-forms-using-the-messaging-portal)

- **Allow clients to view their invoices in my portal:** This option will allow your clients to view any past invoices issued to them, or give them the ability to pay outstanding invoices. When paying invoices, clients are able to use a previously stored credit card on their account.

- **Allow clients to print their superbills in my portal:** This option will let your clients print superbills for any paid invoices, as long as the required superbill information is in place (diagnosis codes, procedure codes, etc.). For more information about superbills, see the following article: How to Create Superbills (//support.intakeq.com/article/262-how-to-create-superbills)

- **Allow clients to view their appointments and packages in my portal:** This option will display any past or upcoming appointments for your clients in the portal. This gives them the ability to cancel and reschedule upcoming appointments. It will also show any service packages your clients have signed up for, and allow them to book the appointments that are a part of the package.

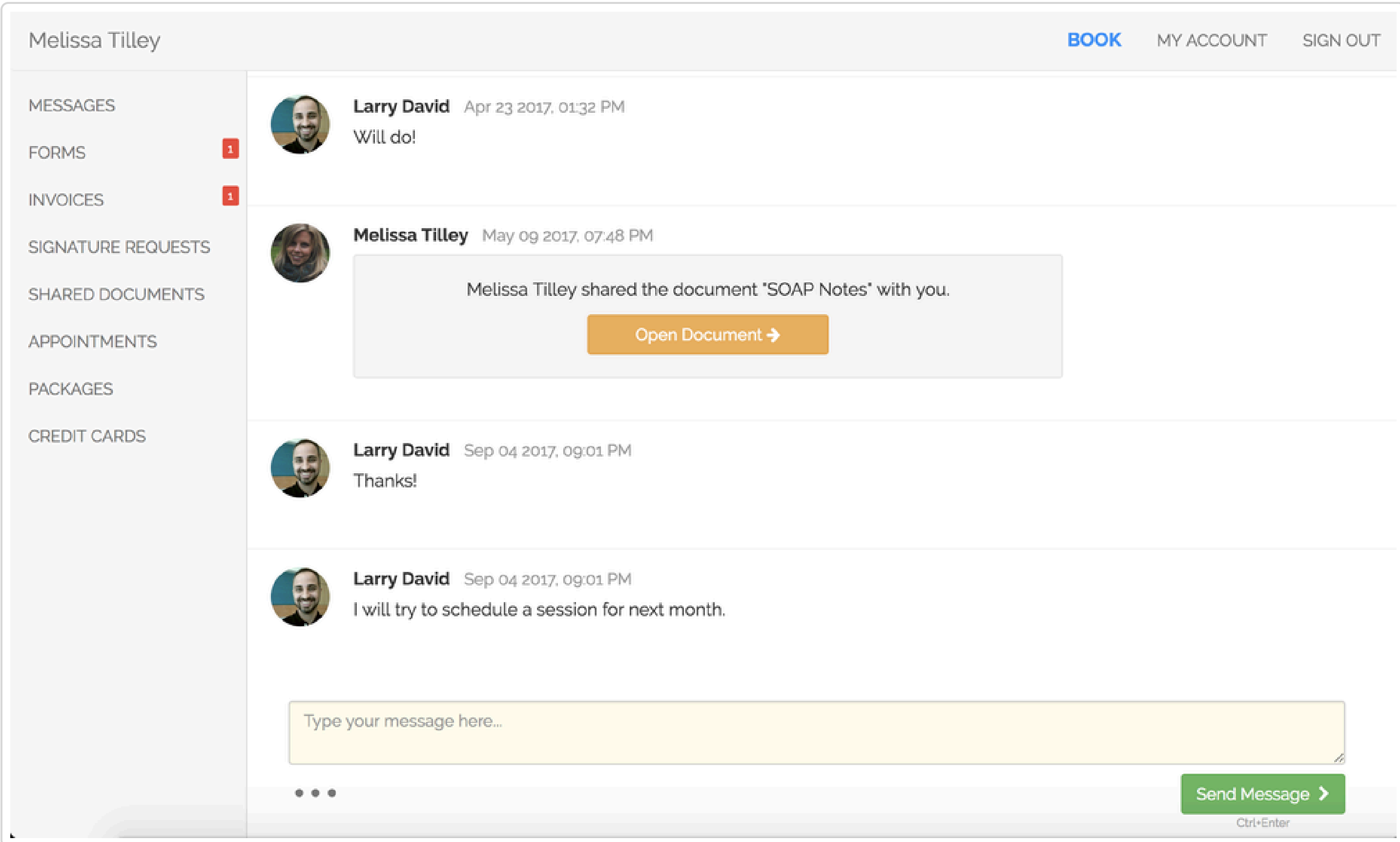
- **Allow clients to view shared documents in my portal:** This option allows your clients to view any documents you have shared with them directly in the client portal. For more information on sending clients documents using the client portal, see the following article: How to Share Notes Using the Client Portal (//support.intakeq.com/article/180-how-to-share-notes-using-the-messaging-portal)

- **Allow clients to view signature requests in my portal:** This option allows your clients to view any signature requests you have sent them in the portal so they can easily sign-off on them as required. For more information on sending signature requests to clients, see the following article: Secure Signature Requests (//support.intakeq.com/article/215-secure-signature-requests)

- **Allow clients to manage their credit card info in my portal:** Clients are able to store their credit card information securely in our system, this option gives them the ability to manage their stored cards for use when booking appointments or paying invoices.

Client View

Below is a basic view of what your clients will see upon logging in to their portal with all of the options described above enabled.

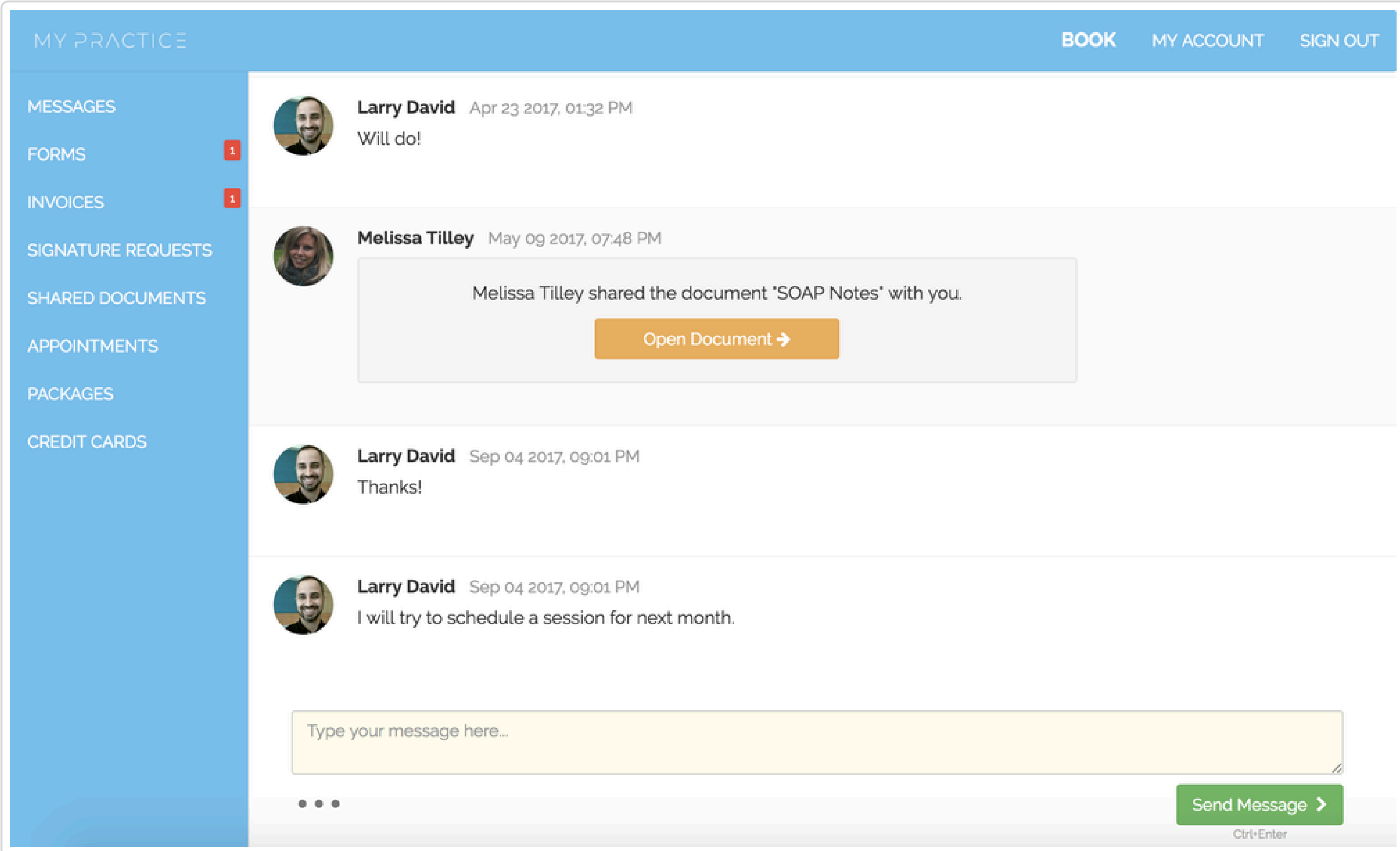


There are a few additional notes in regards to the functionality your clients have in this portal:

- **My Account:** This option allows your clients to update their personal information directly through the client portal.
- **Send Message:** This option allows clients to send you secure messages. This is a great alternative to email when you need to share secure personal information or data. They can also share a file with you by clicking on **"..."** (under the message box) and selecting **"Upload File".**

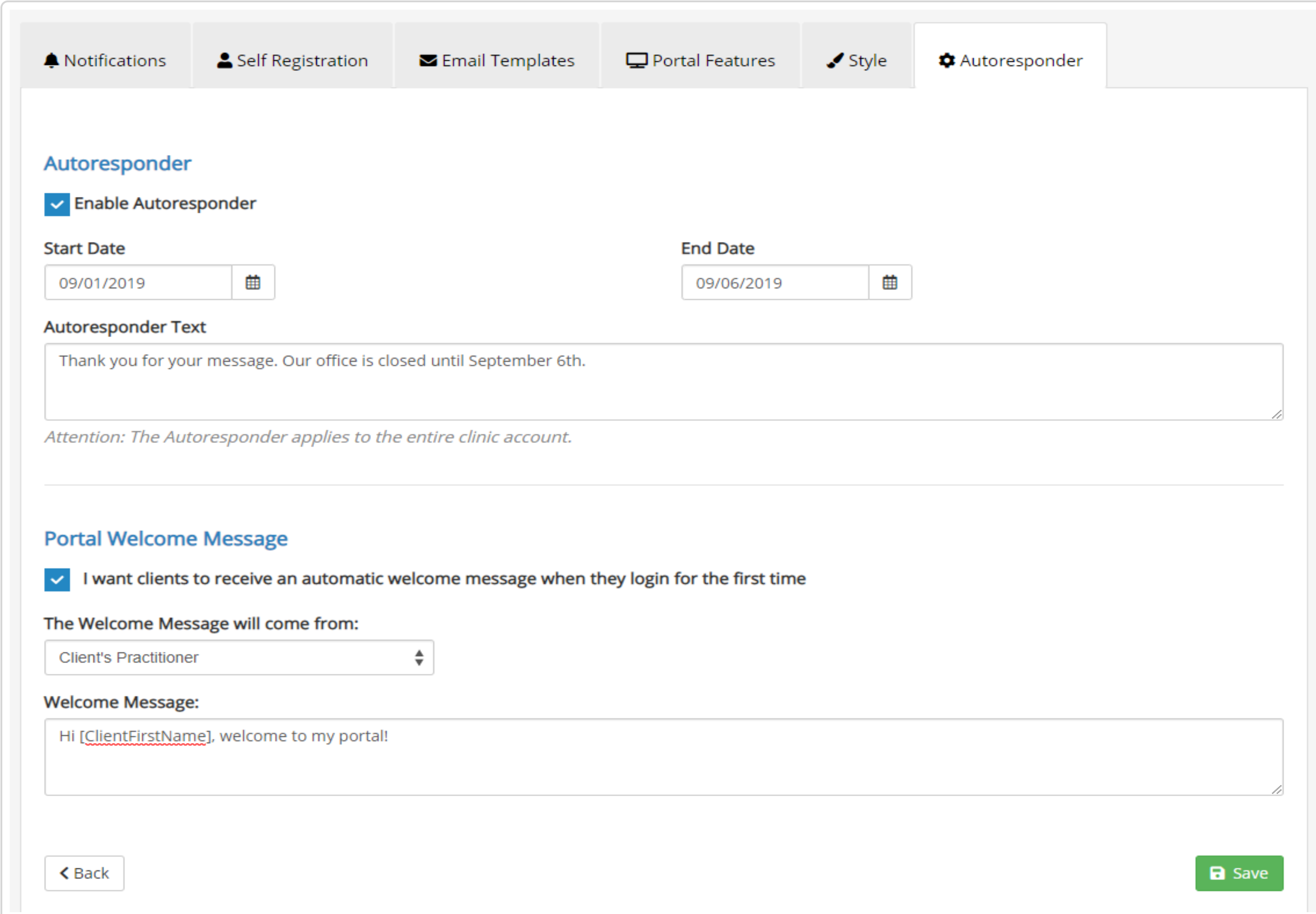
Styling Your Portal

Are you looking to give your client portal a customized look with your logo and color scheme? If so, the following article will show you how to do this: Customizing the Look of Your Client Portal (//support.intakeq.com/article/258-customizing-the-look-of-your-client-portal)



Autoresponder & Welcome Message

You are able to set an autoresponder on your portal, which is a message that will send to any clients that contact you within a specified period of time. Along with this, you can customize a welcome message that is sent when a new client first registers for your portal.



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