How to add a clinician in SimplePractice

If you want to know how to add a clinician in SimplePractice, you do it from the **Team Members** page in **Settings**. You enter the person's basic details, choose their role and permissions, add clinician details such as the NPI, and send an invitation by email. This guide walks you through each step.

Prerequisites

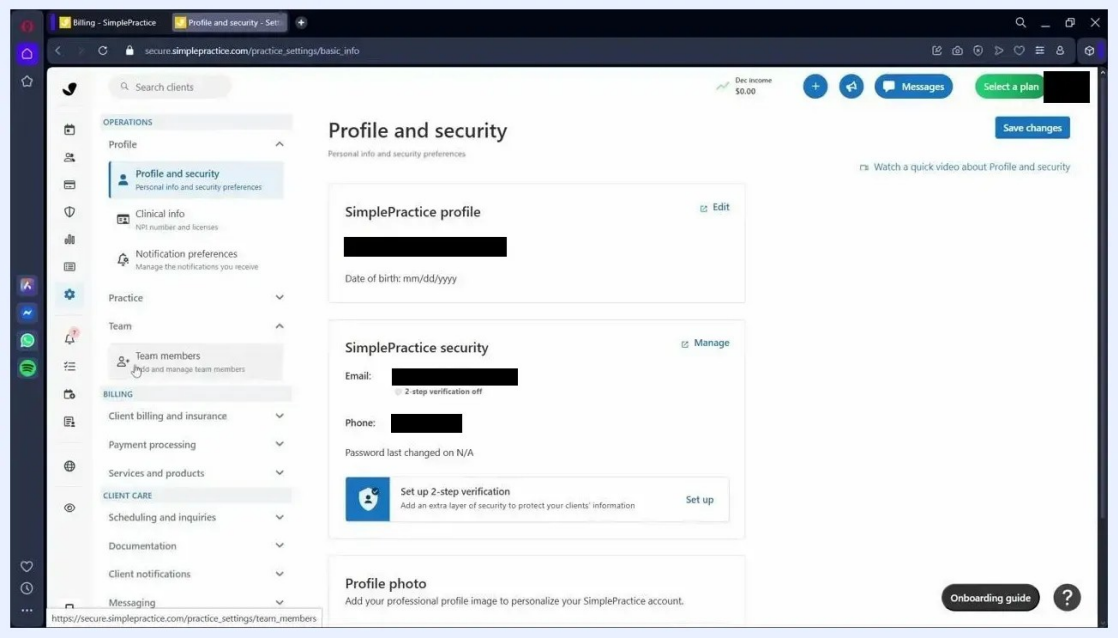
Before you start, gather the following information. Having it ready speeds up onboarding and helps prevent errors in billing or insurance submissions.

- The new team member's NPI (National Provider Identifier).
- An email address for the new team member that is unique and not used in any other SimplePractice account.

Steps

1. Log in and open Settings

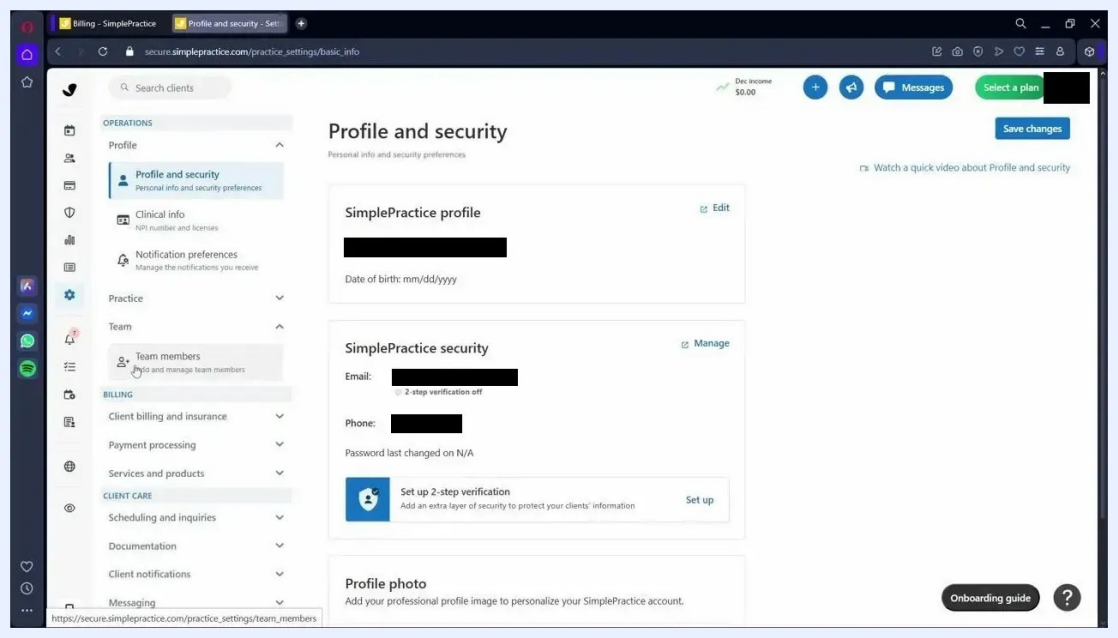
Log in to your SimplePractice account. Make sure you are on the main dashboard or calendar view. Then select **Settings** from the left sidebar. The sidebar includes Calendar, Clients, Billing, Insurance, Analytics, Activity, and Settings.



SimplePractice dashboard with the left sidebar showing Calendar, Clients, Billing, Insurance, Analytics, Activity, and Settings

2. Go to Team Members

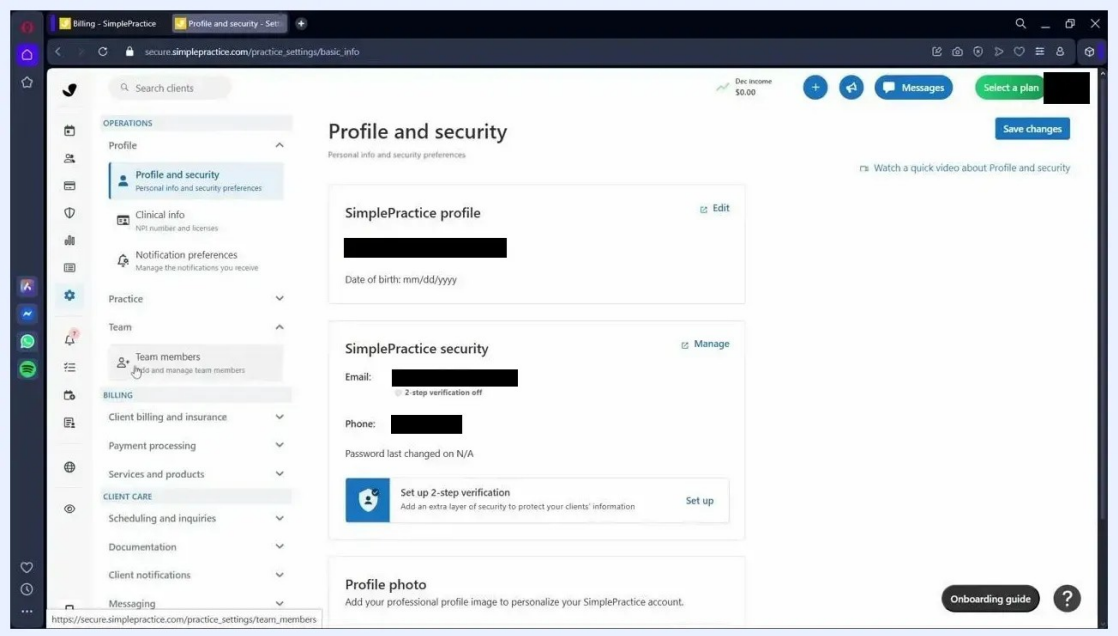
In the **Settings** menu, go to **Team** and select **Team Members**. This section lets you add and manage team members.



Expanded Settings menu with Team > Team Members highlighted

3. Select Add team member

Click **Add team member** in the upper right corner of the Team Members page. The page also lists your current team members, their roles, and their 2-step verification status.



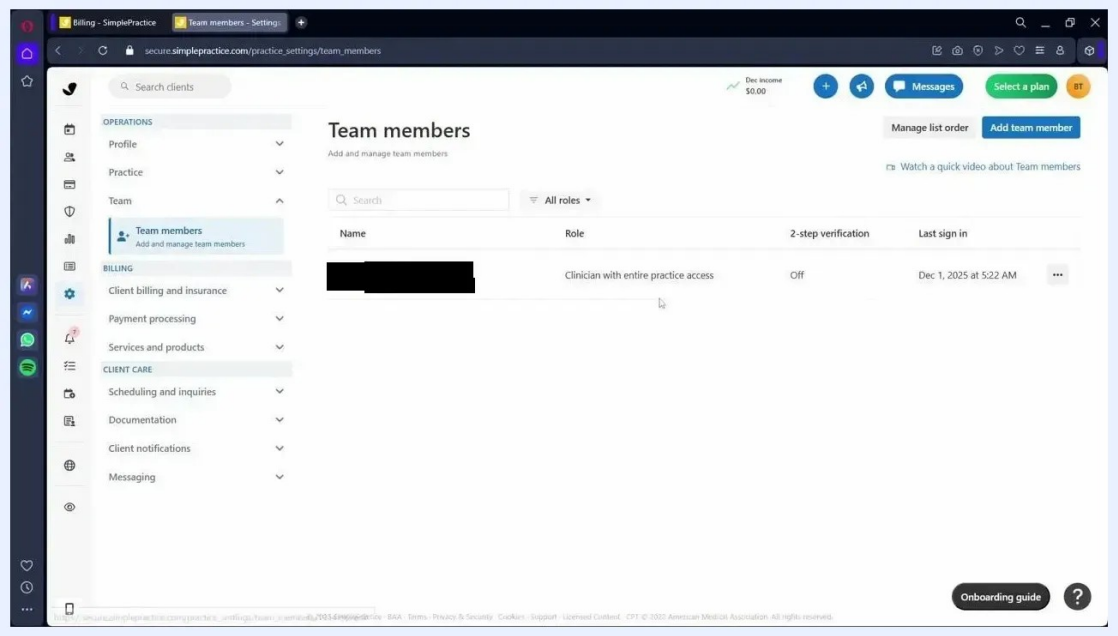
Team Members page with the Add team member button highlighted and an existing member listed with role and email

4. Enter the basic information

Fill in the new team member's details:

- **First name:** Enter the first name (for example, GabSample).
- **Last name:** Enter the last name (for example, Tech).
- **Email:** Enter a unique email address that isn't used in any other SimplePractice account (for example, test4tech.neutron@gmail.com).

Double-check the spelling of the name and email so the invitation doesn't go to the wrong person. Then click **Continue**.



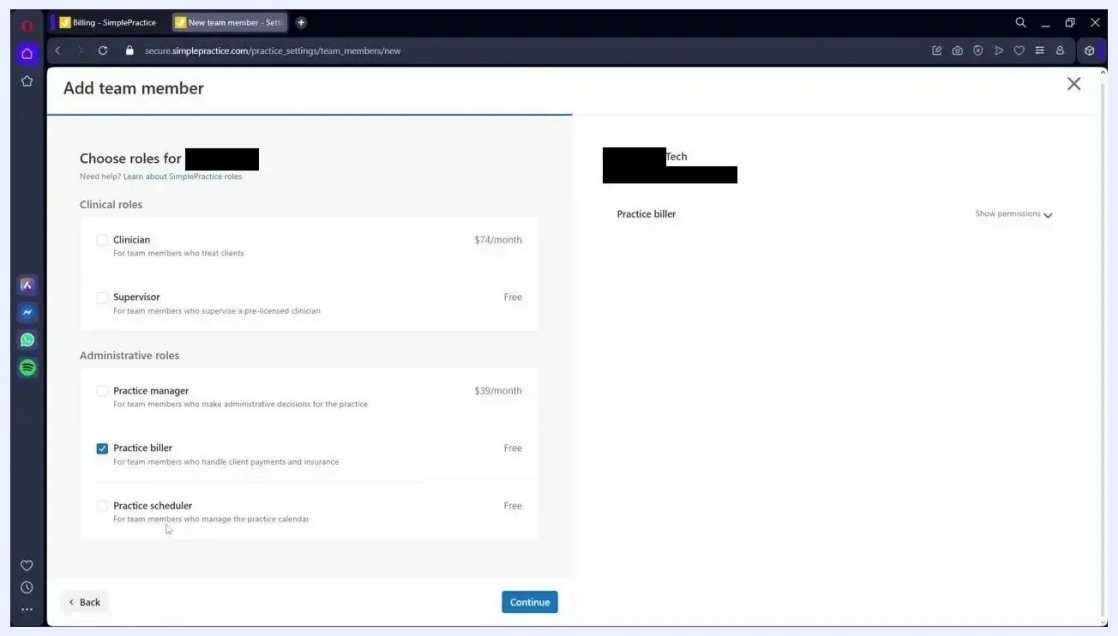
Add team member form with first name, last name, and email fields filled in with example values

5. Choose a role for the clinician

Select the role or roles that fit the new team member. To add a clinician, choose **Clinician**. The available roles are:

- **Clinician** ($74/month): For team members who treat clients.
- **Supervisor** (Free): For team members who supervise a pre-licensed clinician.
- **Practice manager** ($39/month): For team members who make administrative decisions.
- **Practice biller** (Free): For team members who handle client payments and insurance.
- **Practice scheduler** (Free): For team members who manage the practice calendar.

You can select multiple roles if the team member supports more than one function. You can also adjust roles later if their responsibilities change.

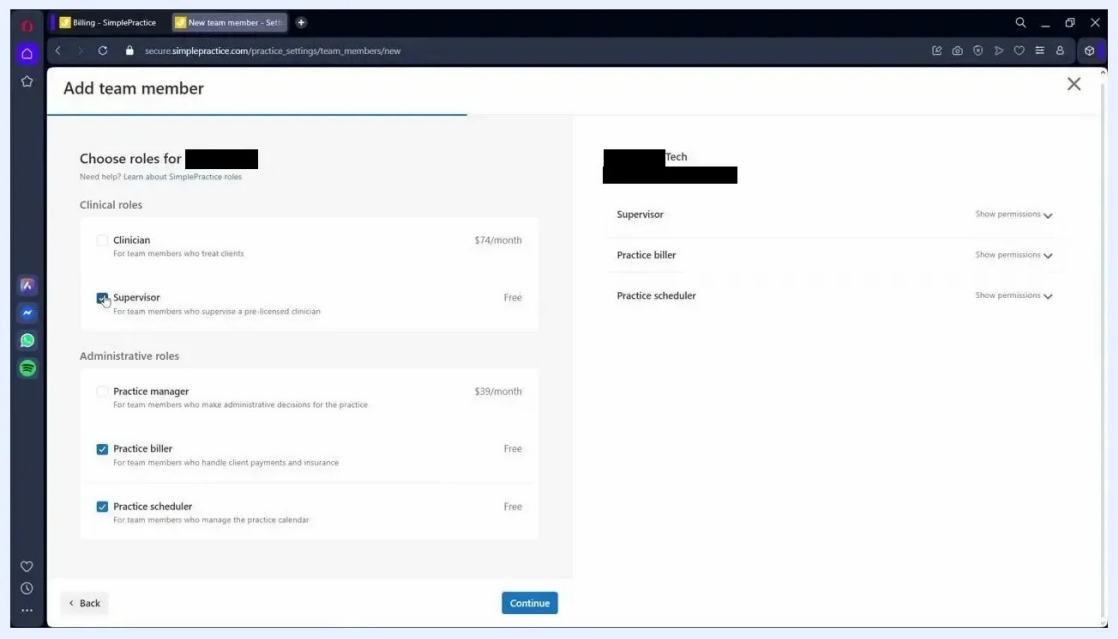


Role selection screen listing Clinician, Supervisor, Practice manager, Practice biller, and Practice scheduler, with Practice biller selected as an example

6. Review the selected roles and permissions

Double-check the roles you selected (for example, Supervisor, Practice biller, and Practice scheduler) and any additional permissions assigned.

Adding a clinician may affect your subscription plan or incur per-clinician charges. Read any notes about plan or pricing impacts carefully to avoid unexpected billing changes.



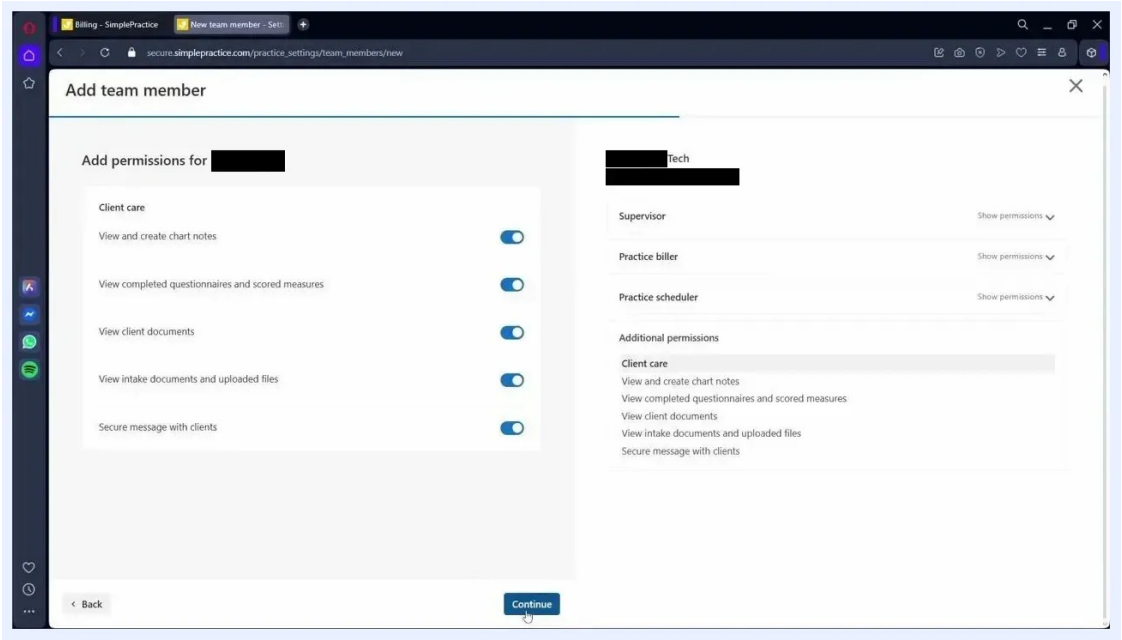
Roles and permissions screen showing Supervisor, Practice biller, and Practice scheduler selected for the new team member

7. Assign Client care permissions

Under **Client care**, turn on the permissions the team member needs:

- View and create chart notes
- View completed questionnaires and scored measures
- View client documents
- View intake documents and uploaded files
- Secure message with clients

Enable only the permissions the team member's responsibilities require, following the principle of least privilege.



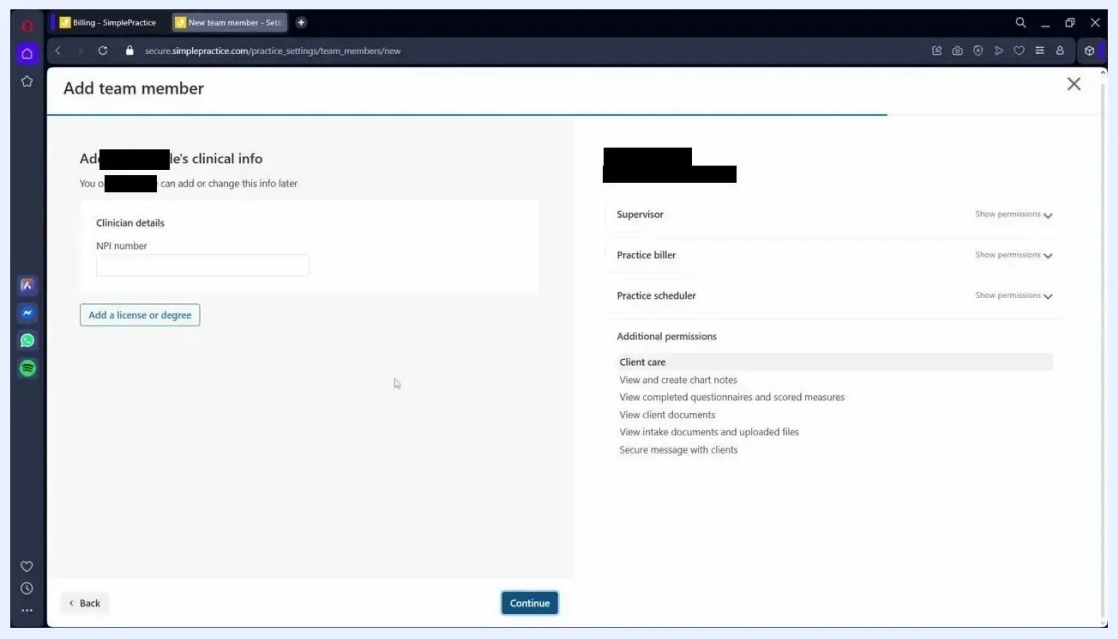
Permissions screen with toggles for chart notes, questionnaires, client documents, intake documents, and secure messaging, some of them enabled

8. Enter the clinician details

If you selected **Clinician**, you are prompted for additional required details in the **Clinician details** section:

- **NPI (National Provider Identifier):** Enter the NPI, making sure it matches the official registry.
- **Specialty:** Choose the specialty that best reflects their practice, so claims and documentation align correctly.

Complete any other required fields. You can also add a license or degree if the role requires it. After you confirm that all permissions and roles are correct, click **Continue**.



Clinical info screen with the NPI number field and the option to add a license or degree

9. Review and send the invitation

Review everything one final time. Make sure the name, email, roles, permissions, and clinical info (if applicable) are accurate. Then click **Send Invitation**.

SimplePractice emails the invitation to the address you entered. The new team member must open the email, follow the link, and create their password. For security, only the new team member can complete this step, not an administrator.

Once the invitation is accepted and the password is set, the new team member is added to your practice with the assigned access.

10. Troubleshoot a missing invitation

If the new team member doesn't receive the invitation email, ask them to check their spam or promotions folder.

What's next

After the clinician accepts the invitation and sets a password, they have access to your practice based on the roles and permissions you assigned. If their responsibilities change, you can adjust their roles later from the Team Members page.