How to add a diagnosis in SimplePractice and complete a treatment plan

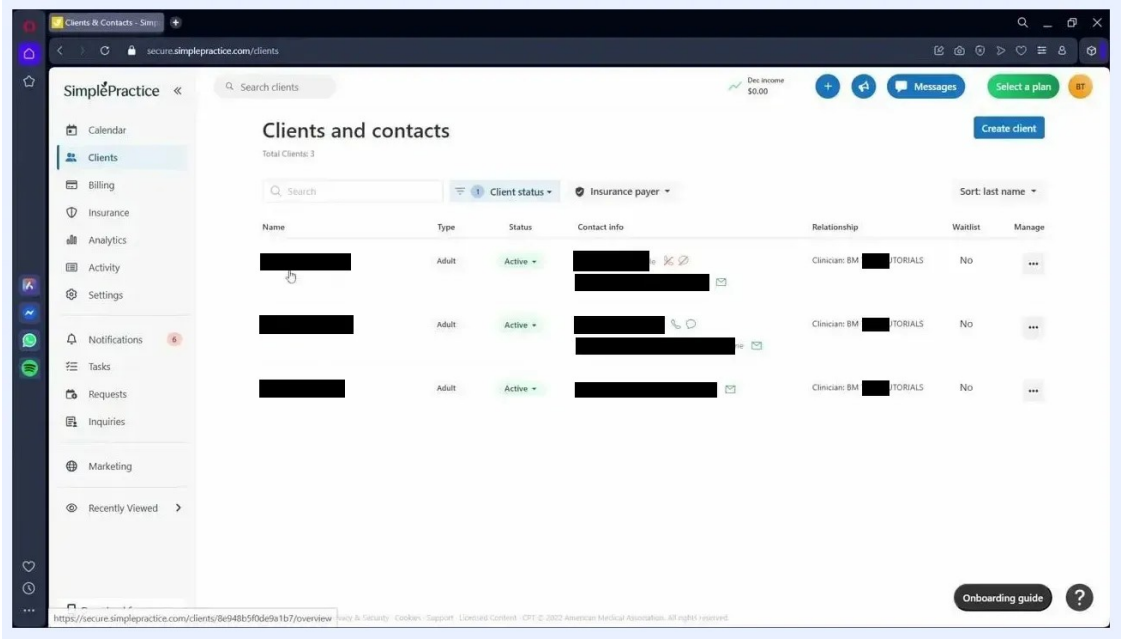
This guide shows you how to add a diagnosis in SimplePractice, from opening a client's profile to saving a treatment plan. You will search for an ICD-10 code, set the diagnosis date and time, and enter treatment plan details. Following these steps keeps your client documentation accurate, organized, and ready for billing and treatment planning.

Prerequisites

- A SimplePractice account that you can log in to from your web browser.
- A client in your **Clients** list whose record you want to update.

Step 1: Open SimplePractice and go to the Clients tab

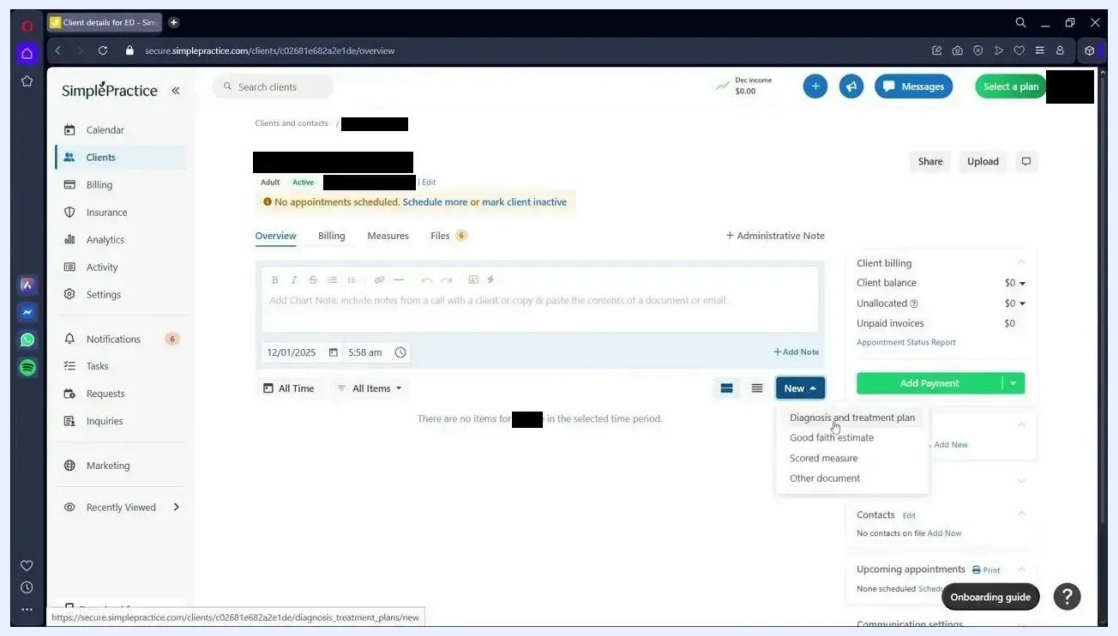
1. Launch your web browser and log in to your SimplePractice account.
2. In the left sidebar, click the **Clients** tab to view your client list.



SimplePractice dashboard with the left sidebar menu (Calendar, Clients, Billing, Insurance, Analytics, Activity, Settings, Notifications, Tasks, Requests, Inquiries, Marketing, Recently Viewed) and a calendar view for Nov–Dec 2025

Step 2: Select the client

1. In the **Clients** tab, locate the client you want to work with.
2. Click the client's name (for example, "Jamie D. Appleseed" or "Ed Doe") to open their profile overview.



Clients and contacts list showing names, statuses, contact information, and relationships, with "Jamie D. Appleseed" being selected

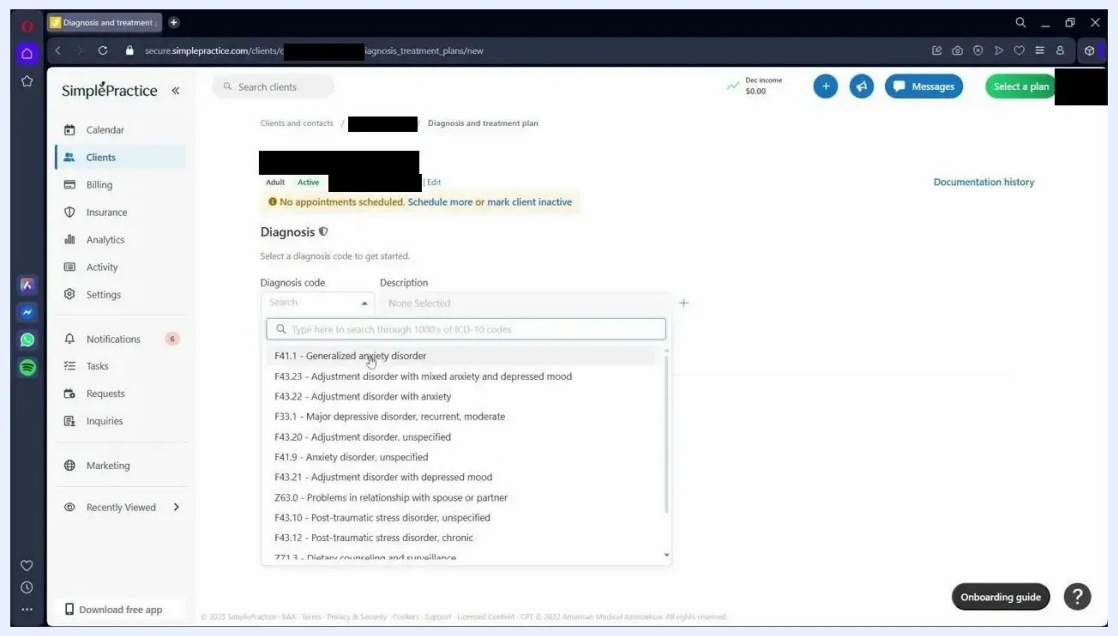
Step 3: Go to the Overview page

Make sure you are on the **Overview** tab of the client's profile. This is the central hub for managing clinical documentation.

Step 4: Start a new diagnosis and treatment plan

1. On the **Overview** page, find the **New** button. It is usually to the right of the chart note area.

2. Click **New**, then select **Diagnosis and Treatment Plan** from the dropdown menu.



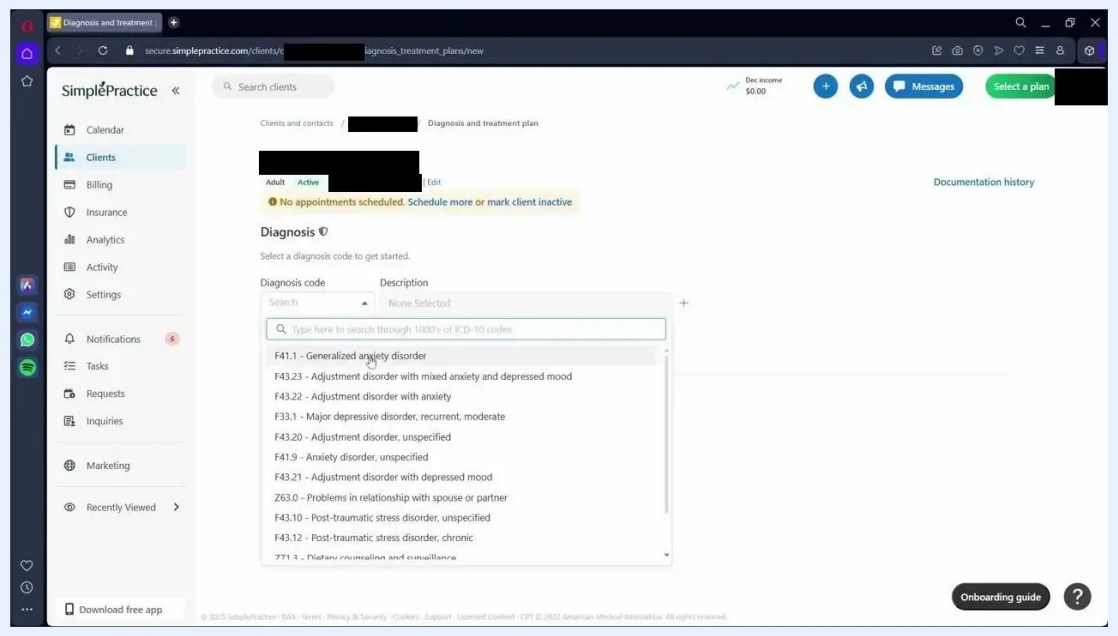
Client overview for "Ed Doe" with the Overview, Billing, Measures, and Files tabs and the New dropdown open, showing "Diagnosis and treatment plan" selected

Step 5: Search for and select the diagnosis code

You are taken to the Diagnosis and Treatment Plan entry area. This is where you add a diagnosis in SimplePractice.

1. In the **Diagnosis code** field, start typing either the ICD-10 code (for example, "F41.1") or the diagnosis name (for example, "generalized anxiety disorder").
2. As you type, a dropdown list shows matching options.
3. Select the code that best fits your clinical assessment.

If you are unsure of the exact code, type a few keywords to narrow the options.



Diagnosis and treatment plan entry screen with an ICD-10 search box and a dropdown listing options such as F41.1 - Generalized anxiety disorder and F43.23 - Adjustment disorder with mixed anxiety and depressed mood

Step 6: Prioritize and review your diagnoses

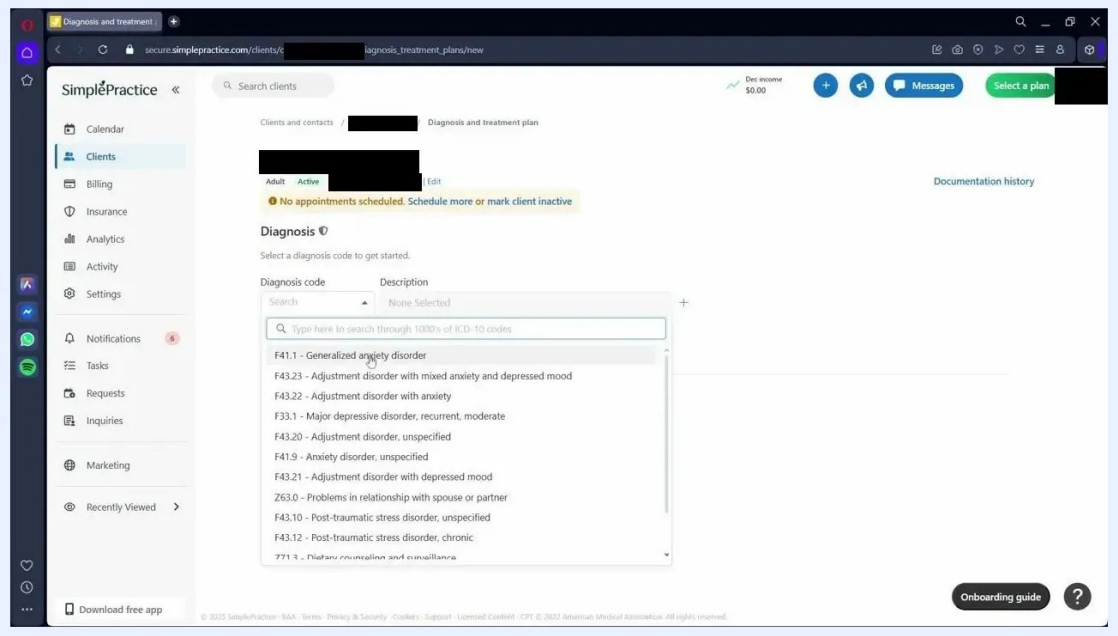
Identify the main reason for treatment, or the condition that best explains the client's current presentation. List this primary diagnosis at the top of the diagnoses list.

Order any additional diagnoses to reflect your clinical priorities. This ordering ensures your notes, treatment plan, and claims accurately represent your clinical assessment.

Step 7: Confirm and save the diagnosis

1. After you select the diagnosis, check that the **Description** field fills in automatically (for example, "Generalized anxiety disorder").
2. Enter the **Date and time of diagnosis** (for example, "12/01/2025" and "5:58 am").

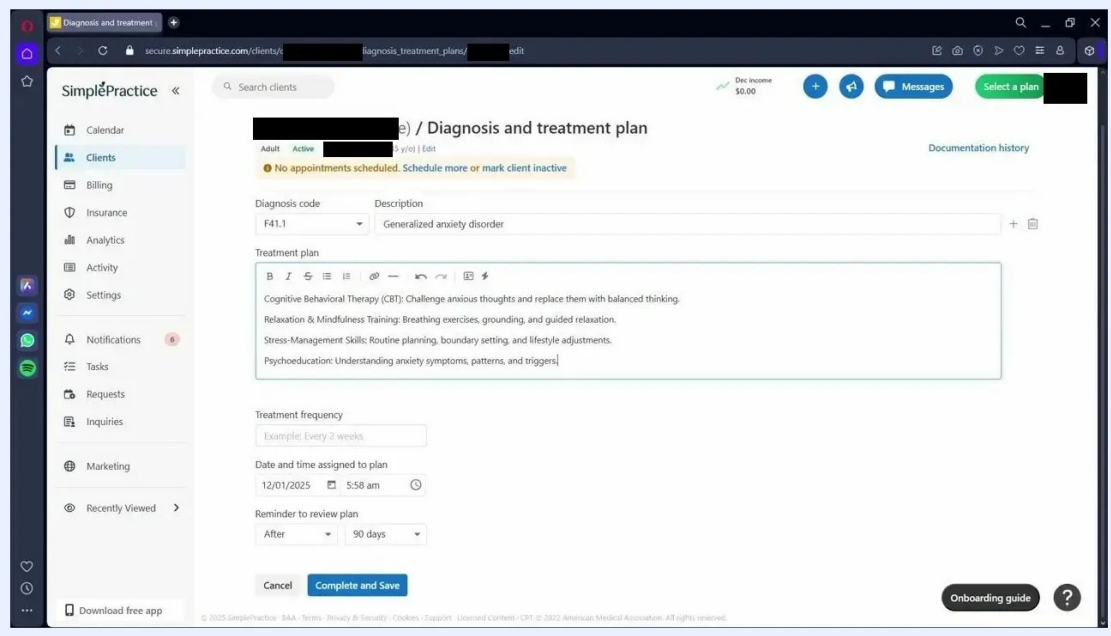
3. Click **Save** to record the diagnosis.



Diagnosis entry screen with F41.1 - Generalized anxiety disorder selected, the date and time fields filled in, and the Save button highlighted

Step 8: Review the saved diagnosis

After you save, the diagnosis appears in the list along with its date and time. The **Treatment Plan** section is now available for you to complete.



Diagnosis and treatment plan summary showing F41.1 - Generalized anxiety disorder, its date and time, and a dropdown for choosing a treatment plan

Step 9: Enter the treatment plan

1. In the **Treatment plan** text area, enter detailed interventions and goals.
2. Optionally, fill in **Treatment frequency** (for example, "Every 2 weeks").
3. Set the **Date and time assigned to plan** (for example, "12/01/2025" and "5:58 am").
4. Set a **Reminder to review plan** (for example, "After 90 days").
5. Click **Complete and Save** to finalize the treatment plan.

For example, a plan for generalized anxiety disorder could include the following:

- Cognitive Behavioral Therapy (CBT): Challenge anxious thoughts and replace them with balanced thinking.
- Relaxation & Mindfulness Training: Breathing exercises, grounding, and guided relaxation.

- Stress-Management Skills: Routine planning, boundary setting, and lifestyle adjustments.
- Psychoeducation: Understanding anxiety symptoms, patterns, and triggers.

Tips

- Verify the spelling of diagnosis names, and make sure the primary diagnosis is listed first.
- The order of diagnoses matters for documentation and billing.
- Use the plus (+) icon to add more diagnoses if needed.
- Make sure your selections align with clinical documentation and payer requirements.

What's next

Now that you know how to add a diagnosis in SimplePractice and save a treatment plan, you can repeat these steps for other clients. When the reminder you set comes due, review the plan and update it as needed.