How to delete a client in SimplePractice

If you need to remove a client record, this guide shows you how to delete a client in SimplePractice permanently. Deleting a client removes the profile and all associated data from your account, so review the considerations below before you start.

Prerequisites

Before you delete a client, confirm the following:

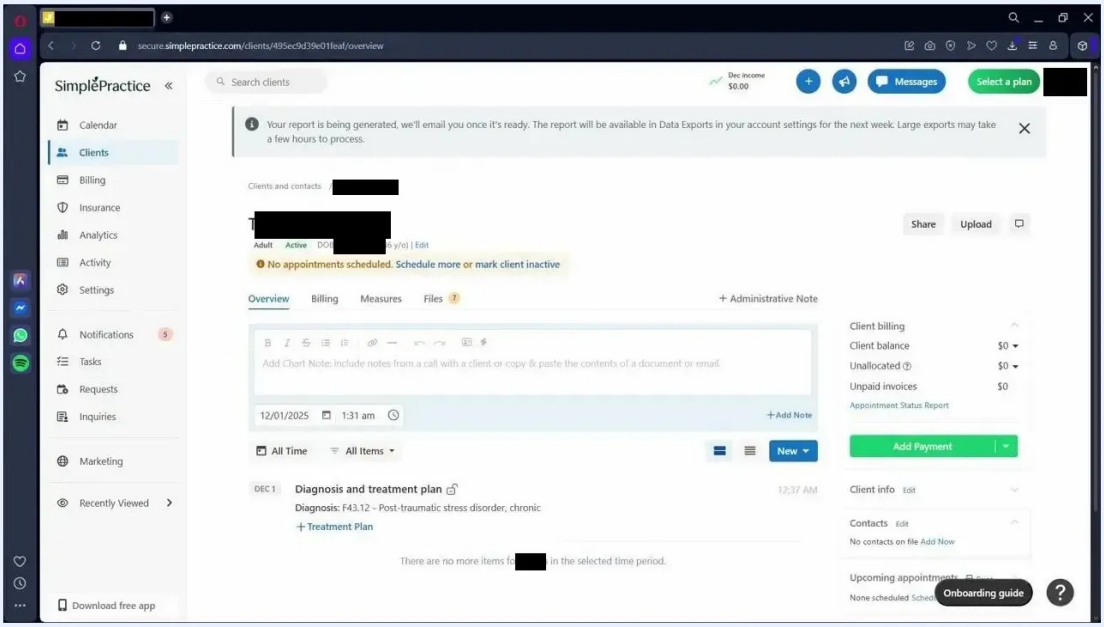
- You understand that deleting a client is permanent and cannot be undone.
- You are authorized to delete the record.
- Deleting the record complies with your practice's data retention policies and any regulatory requirements.

Steps to delete a client in SimplePractice

1. Open the client's overview page

1. Go to the SimplePractice dashboard.
2. Click the **Clients** tab in the left sidebar.

3. Find the client you want to delete in the list and select the client.



The clients and contacts list showing client names, statuses, and contact information, with the cursor selecting "T Tech (Techy Tech)"

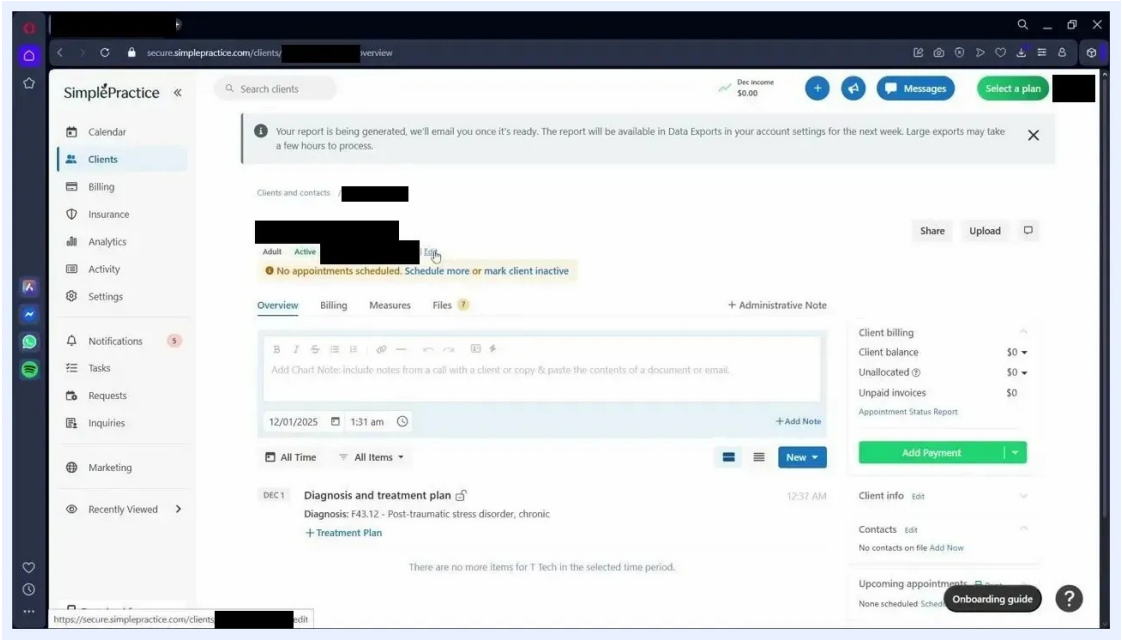
2. Verify that you have the correct client

Check the client's name, date of birth, and other identifying details to make sure you have the right record. Every action that follows affects this specific client, so this check is critical.

3. Enter Edit mode

1. On the client's overview page, find the client's name at the top.

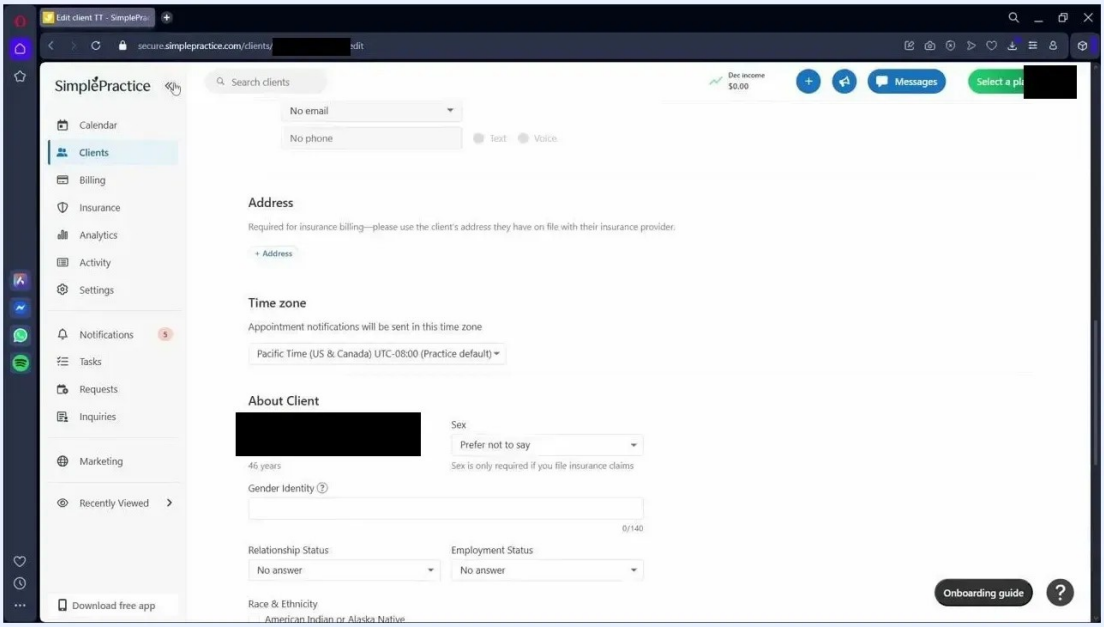
2. Click the **Edit** link next to the name to switch the profile into Edit mode.



The client overview page for "T Tech (Techy Tech)" with the Edit link highlighted next to the name and demographic details

4. Scroll to the Delete this client button

Scroll down through the client's editable information, such as address, time zone, and contact details. At the very bottom, find the red **Delete this client** button.

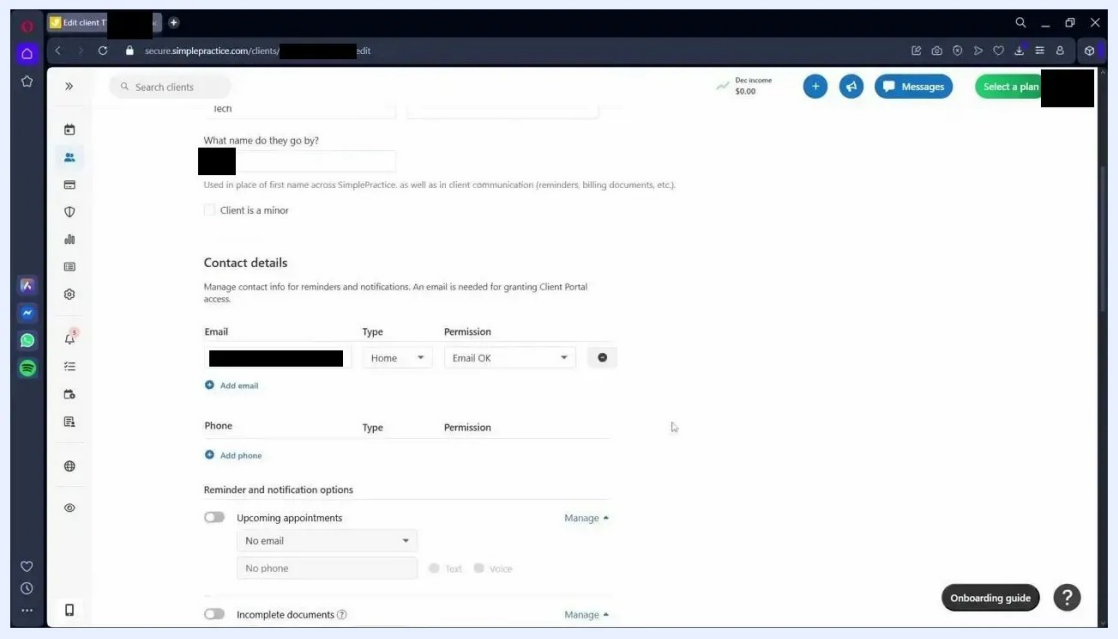


The Edit client page with the Delete this client button in the bottom right corner

5. Start the deletion and read the warning

Click **Delete this client**. A confirmation window asks whether you are sure you want to delete the client.

The dialog warns that deleting an active client permanently removes all documentation and appointment history. If you want to keep the client's file instead, consider changing the client's status to **Inactive**.



A confirmation dialog asking "Are you sure you want to delete T Tech?" with Cancel and Continue to delete options, a warning about permanent removal, and a suggestion to change the status to inactive instead

6. Continue to delete

If you are certain you want to delete the client, click **Continue to delete**.

7. Type the client's name

SimplePractice prompts you to type the client's first and last name exactly as displayed. Match the capitalization, spacing, punctuation, hyphens, accents, and middle initials. This step is case-sensitive, and the name must match precisely.

8. Acknowledge the permanent data loss

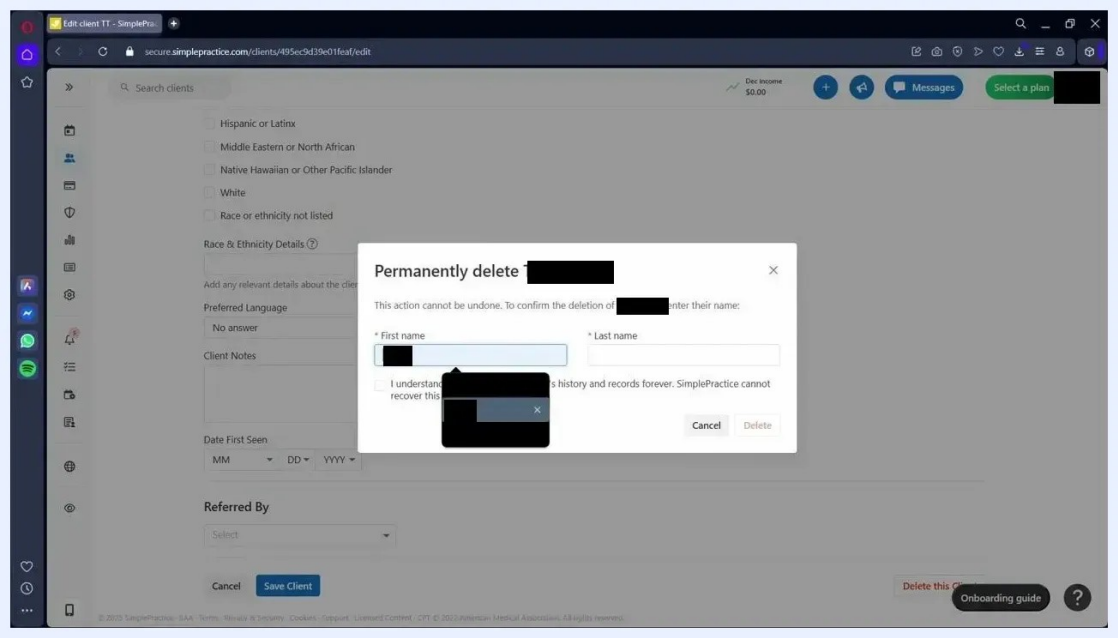
If prompted, check the box to acknowledge that deleting the client permanently removes all history and records. This includes all notes, documentation, billing information, and uploaded files associated with the client.

If you must retain certain records for compliance, pause here. Export or otherwise handle those records before you continue.

9. Finalize the deletion

After you enter the client's name and acknowledge the warning, click **Delete** or **Permanently Delete Client** to confirm. The system processes your request, which may take a moment.

When it finishes, the client profile and all associated data are permanently removed from your account. The client no longer appears in your client list.



The permanent deletion confirmation dialog, "Permanently delete Techy Tech?", with fields for the first and last name and a checkbox confirming you understand the permanent data loss

10. Verify the deletion

Confirm that the client no longer appears in your client list. If the client still appears, refresh your browser and check for any error messages.

Final reminders

- This action cannot be undone. Double-check the client's identity and confirm any data retention requirements before you start.
- Use the **Inactive** status if you may need to retain records for compliance or future reference.

Summary

By following these steps, you make sure that only intentional deletions occur and that you stay compliant with your organization's data retention

policies. You now know how to delete a client in SimplePractice safely and permanently.

What's next

- Review your practice's data retention policies before your next deletion.
- Change a client's status to **Inactive** when you want to keep their file instead of deleting it.