How to export client data from SimplePractice

This guide shows you how to export client data from SimplePractice. You can export data for every client in your practice or for one client, and you can choose between a complete export, a sessions-only export, or a contacts-only export. Follow the steps below to start an export, wait for it to finish, and download your file.

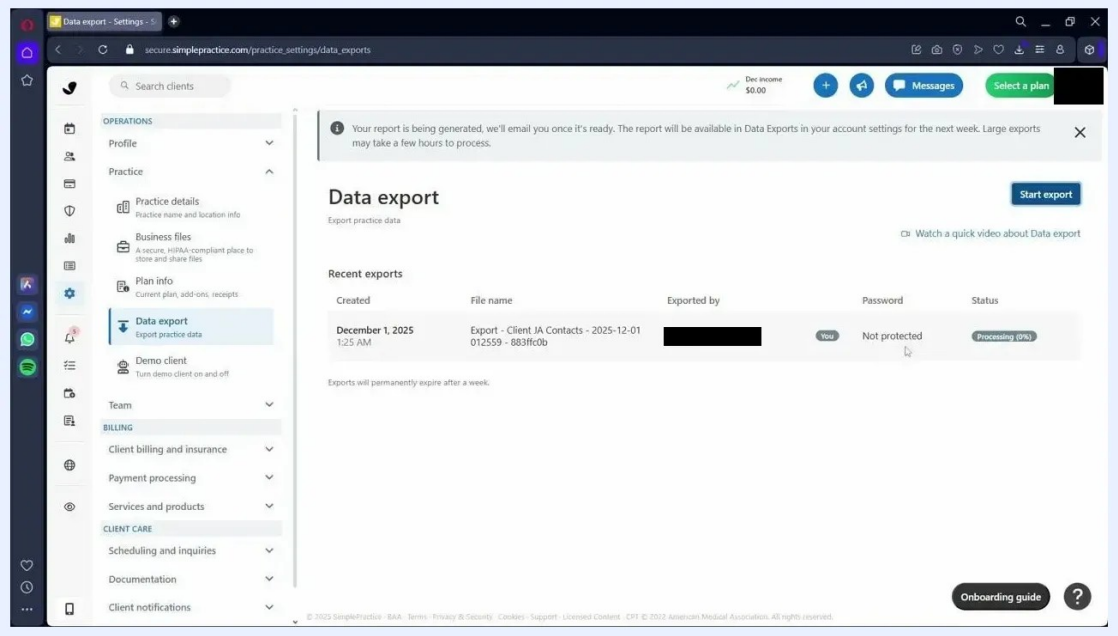
Prerequisites

- A SimplePractice account that you can log in to from a web browser.

Plan your export before you start

Decide exactly who and what you need to export. Choose the right combination of scope and type on your first try so you avoid unnecessary exports.

Limiting an export to only what you need reduces processing time and keeps your records more manageable.



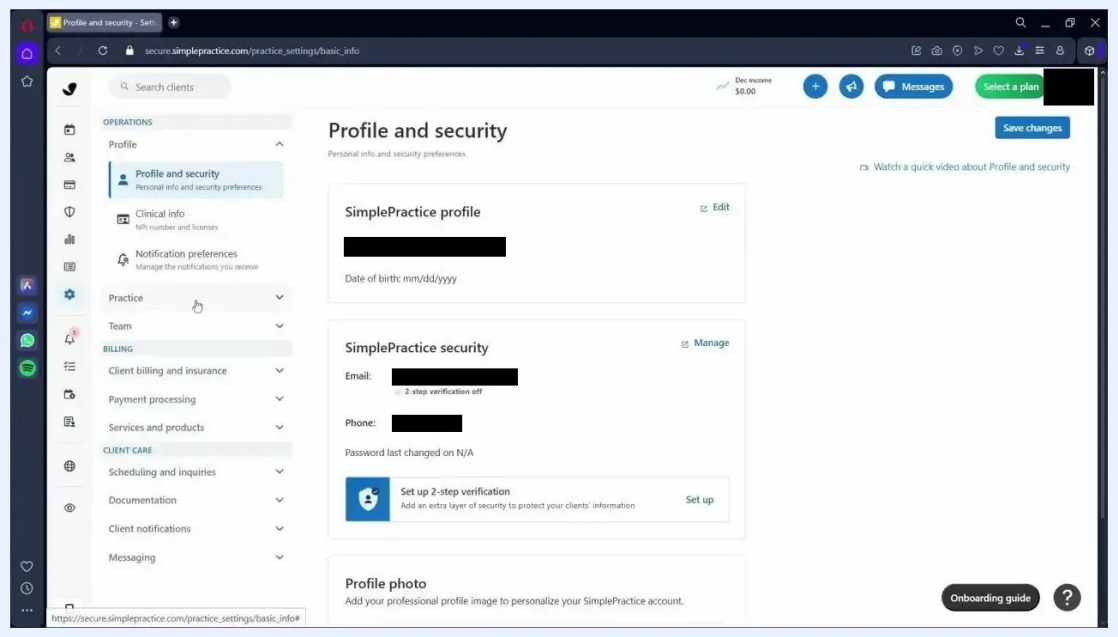
Data export page with recent exports listed, showing why you should limit exports to the data you need.

Steps

1. Open your SimplePractice dashboard

Open your web browser and log in to your SimplePractice account. The main dashboard appears with a calendar view and a sidebar menu.

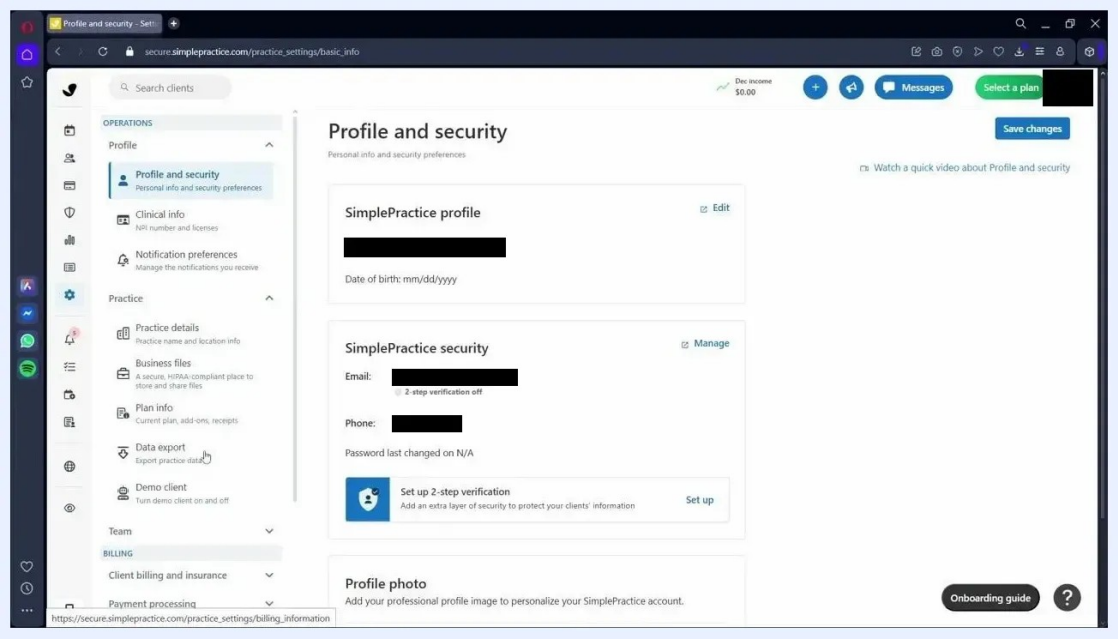
The sidebar includes Calendar, Clients, Billing, Insurance, Analytics, Activity, and Settings.



SimplePractice dashboard with the calendar view and the sidebar menu showing Calendar, Clients, Billing, Insurance, Analytics, Activity, and Settings.

2. Go to Settings and open Data export

In the sidebar, click **Settings**. Under Settings, expand the **Practice** menu, then click **Data export** to access the export options.

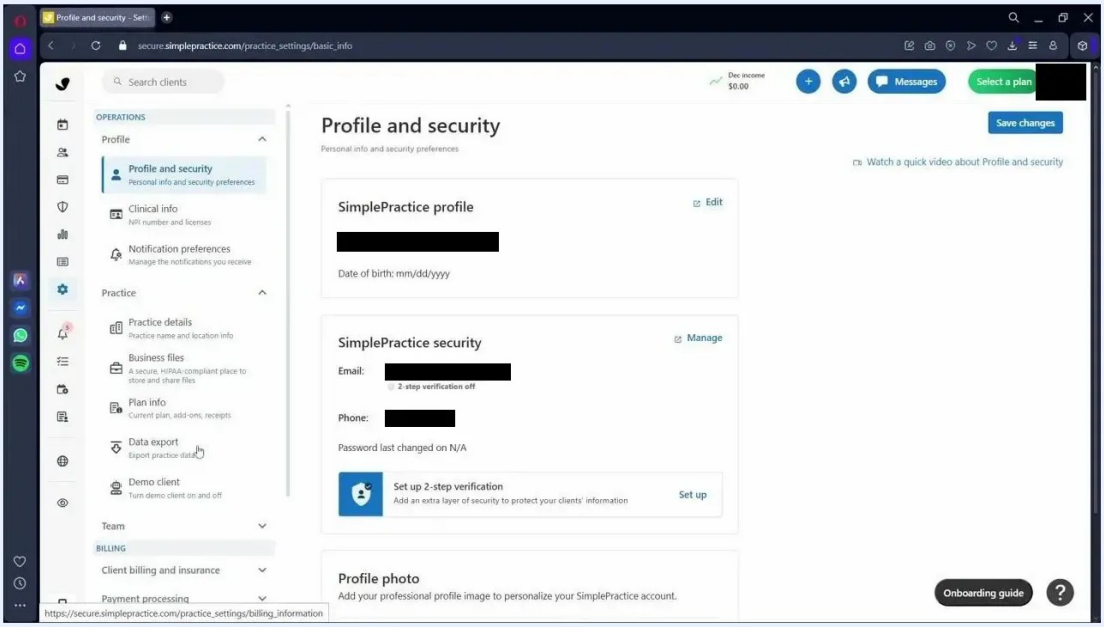


Settings page with the Practice menu expanded and the Data export option visible in the sidebar.

3. Start a new client data export

The Data export page appears. If you haven't exported data recently, it shows "No recent exports."

Click **Start export** in the upper right corner.



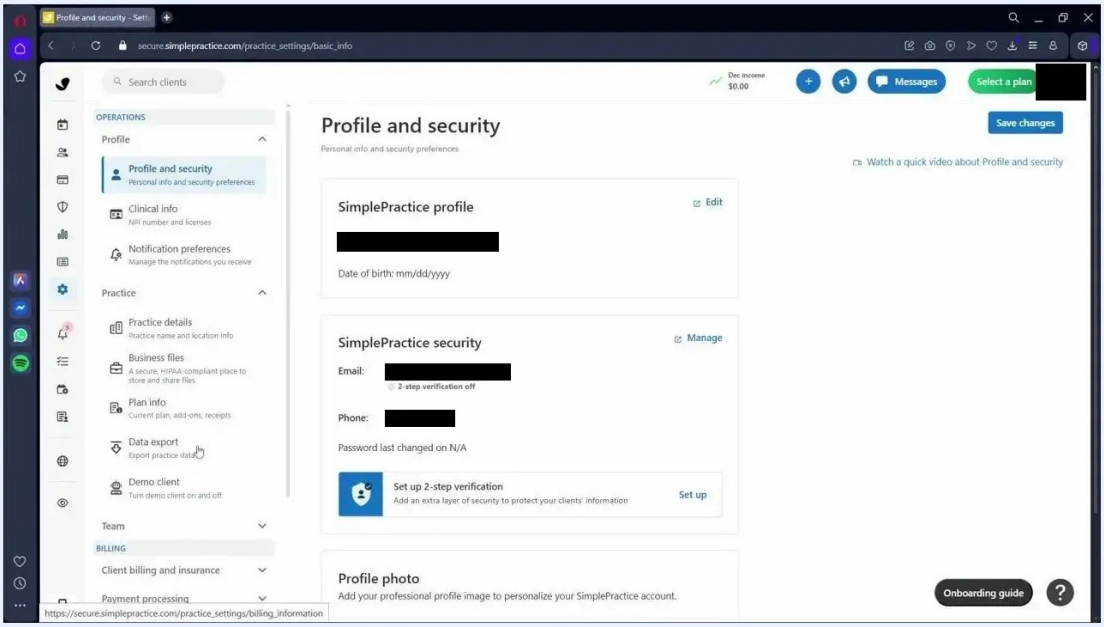
Data export page with the Start export button highlighted and no recent exports listed.

4. Choose whose data to export

The **Export client data** dialog box appears. Select the scope of your export:

- Click **All clients in the practice** to export data for every client.
- Click **One client** to export data for a specific individual.

If you choose **One client**, select the client from the dropdown list.



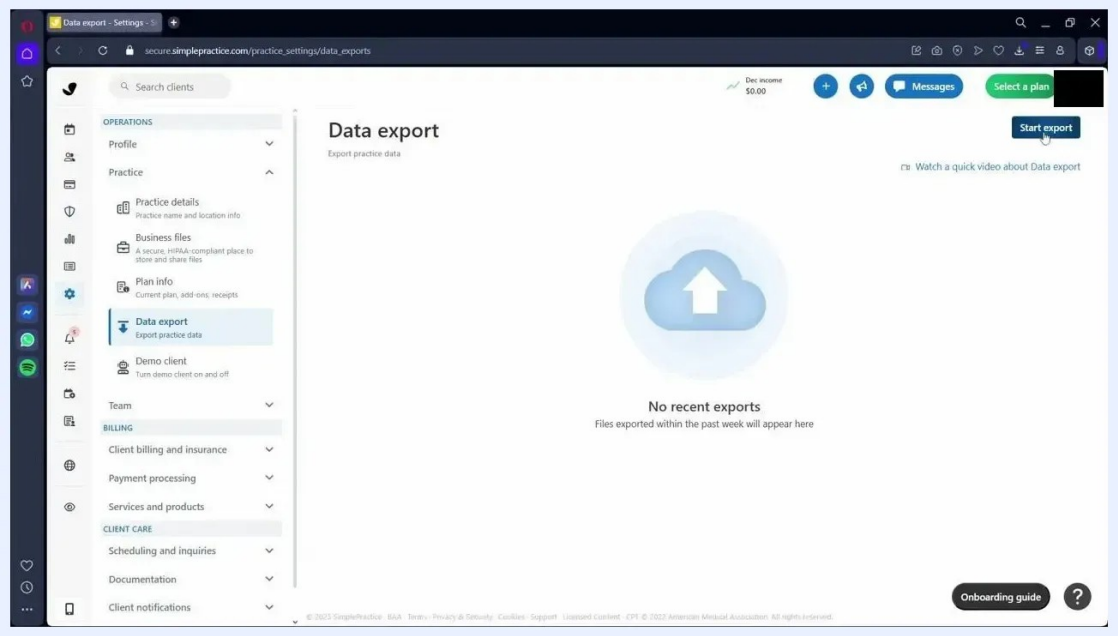
Export client data dialog showing the All clients in the practice and One client options.

5. Select the type of export

In the next dialog, choose the type of data to export:

- **Complete**: Includes client contact information and all documentation. This covers contact details, billing documents, invoices, claims, superbills, clinical items, progress notes, therapy notes, charts, treatment plans, stored documents, secure messages, and more.
- **Sessions**: Includes only clinical documentation (notes, charts, and treatment plans) and omits contact information.
- **Contacts**: Includes only client contact information.

Make sure the **Require a password to open file (recommended)** box is checked for security.

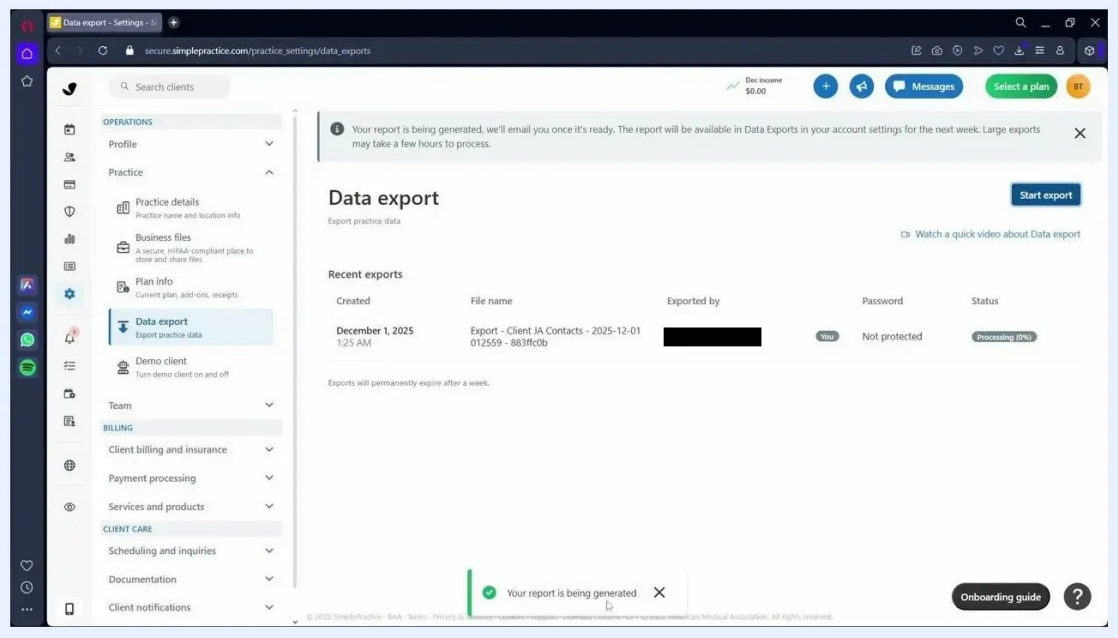


Export client data dialog showing the Complete, Sessions, and Contacts options and the password protection checkbox.

6. Understand the export types and file formats

Use the **Sessions** option when you need to review clinical documentation without exposing personal contact data.

Use the **Contacts** option when you need only client contact information. This export generates a file in vCard (.vcf) format. You can import the .vcf file into address book applications for quick reference. It does not include any clinical or billing details.

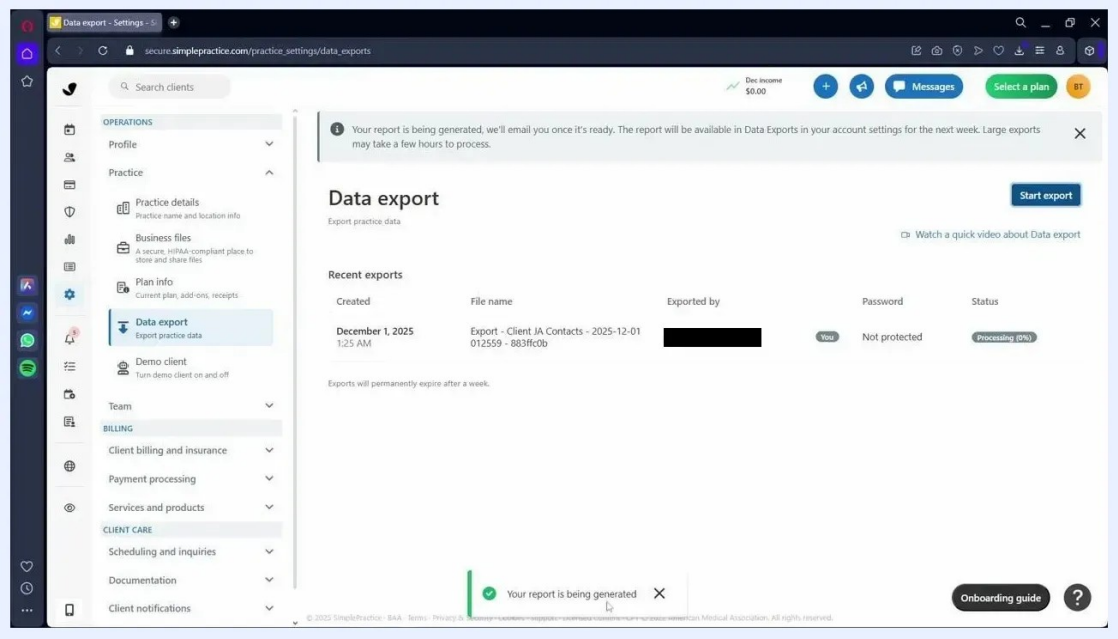


Export client data dialog with the Contacts option selected, showing that it includes only client contact information and exports as a .vcf file.

7. Confirm your selections and start the export

After you confirm both the scope (which clients) and the type (Complete, Sessions, or Contacts), click **Export**. The system begins processing your request.

Processing time varies. Small exports may finish in a few minutes, while large, practice-wide exports may take longer. You don't need to do anything while the export runs.

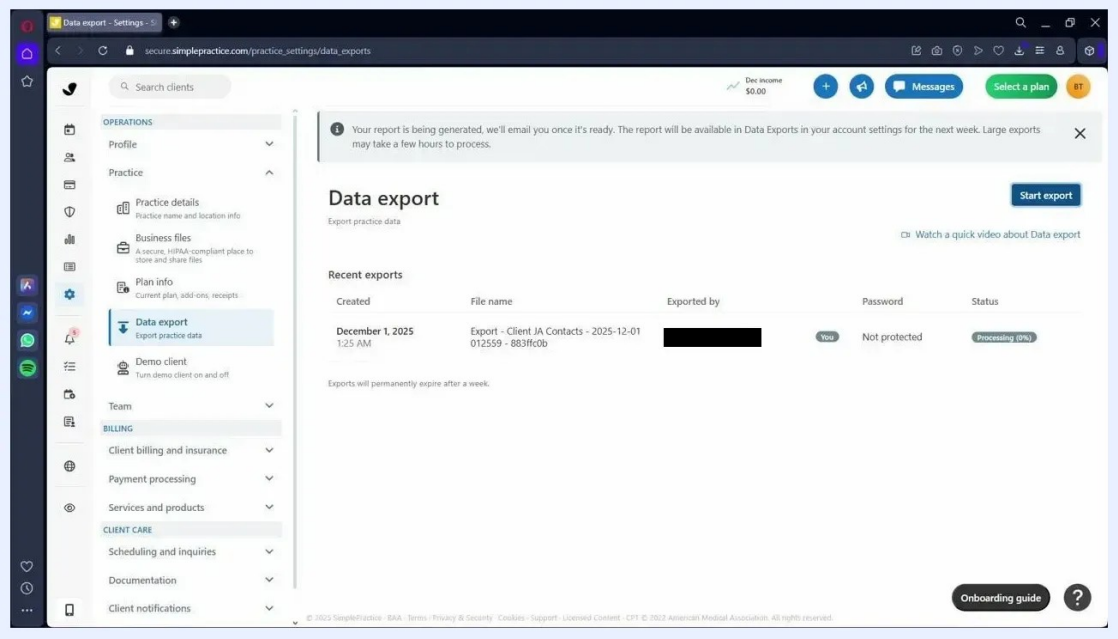


Data export page showing the export in progress, with a status bar and a message that the report is being generated.

8. Download your export when it's ready

When the export finishes, you receive an email notification that your file is ready to download.

The export is available in the **Data export** section of your account settings for one week. It expires permanently after that, so download your file promptly.



Data export page confirming the export is complete and showing its status.

Summary

You have now completed the full process to export client data from SimplePractice.

- Review your export needs before you start to keep the process efficient and your data secure.
- Choose the scope (all clients or one client) and the type (Complete, Sessions, or Contacts) that fit your needs.
- Keep the password requirement turned on for security.
- Download your export within a week of completion, because it expires after that.