How to send a client portal link in SimplePractice

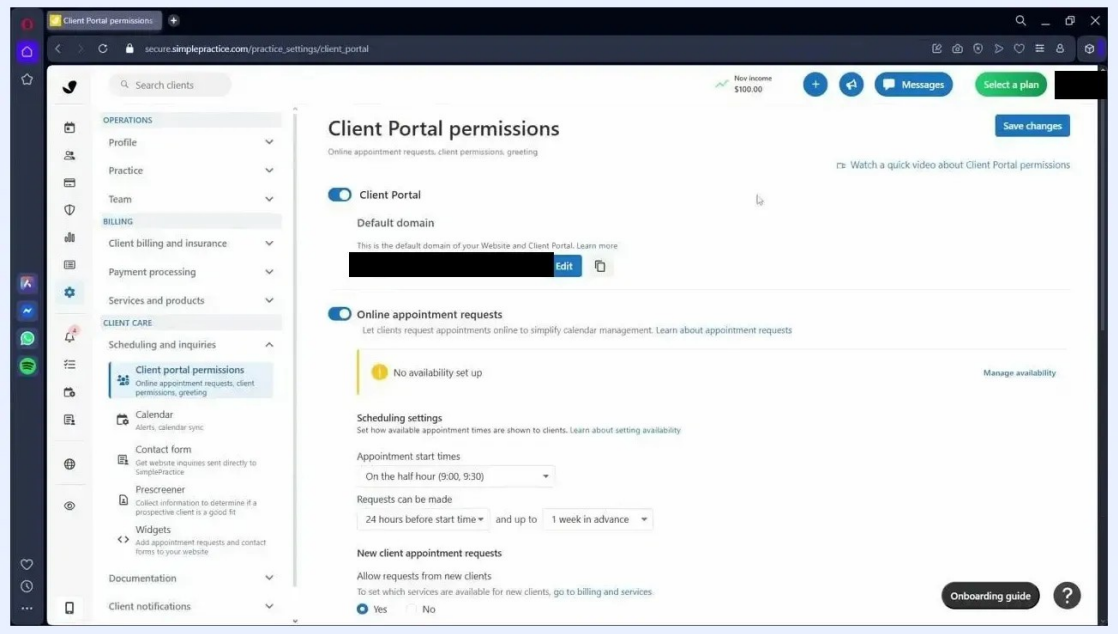
You can send a client portal link in SimplePractice in two ways. You can invite a client when you create their profile, or you can send an invitation from an existing client's profile. This guide shows you how to enable the client portal, send the invitation, and share your practice's portal URL.

Prerequisites

- A SimplePractice account you can log in to.
- The **Client Portal** setting turned on for your practice. Step 2 and Step 3 show you how.
- The client's email address, so SimplePractice knows where to send the invitation.

Step 1: Open your SimplePractice dashboard

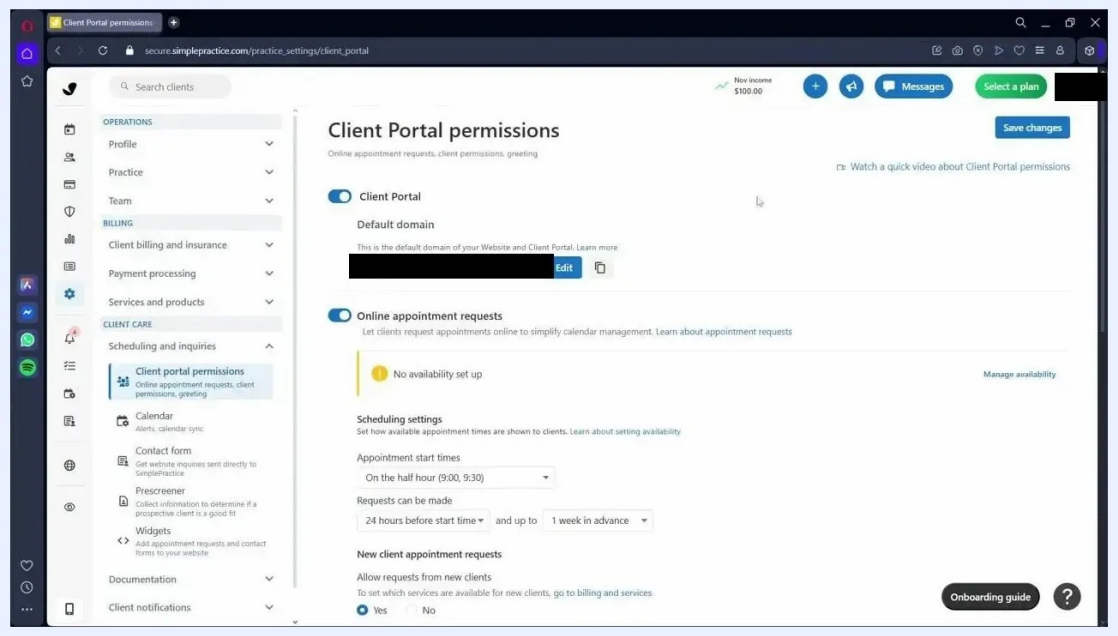
Log in to your SimplePractice account. The main dashboard shows your calendar. The navigation menu on the left includes Calendar, Clients, Billing, Insurance, Analytics, Activity, and Settings.



SimplePractice dashboard with the calendar view and left navigation menu

Step 2: Go to Client portal permissions

1. Click **Settings** in the left navigation menu.
2. Under **Client Care**, select **Scheduling and inquiries**.
3. Click **Client portal permissions** to open the portal settings.



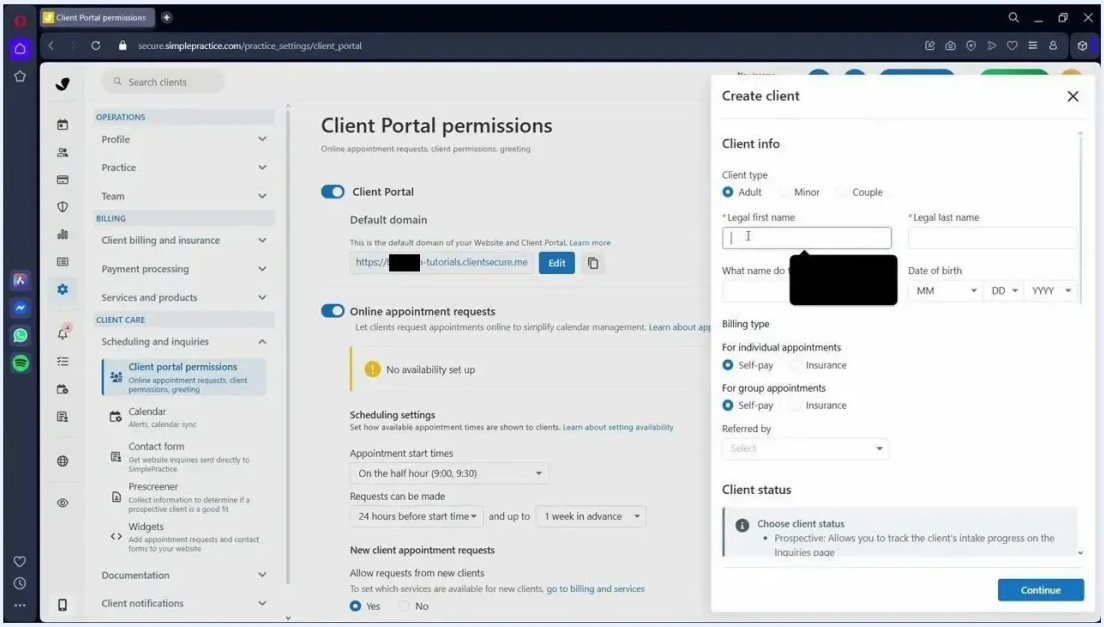
Settings menu with Client portal permissions highlighted

Step 3: Enable the client portal

Before you send a client portal link in SimplePractice, make sure the portal is on.

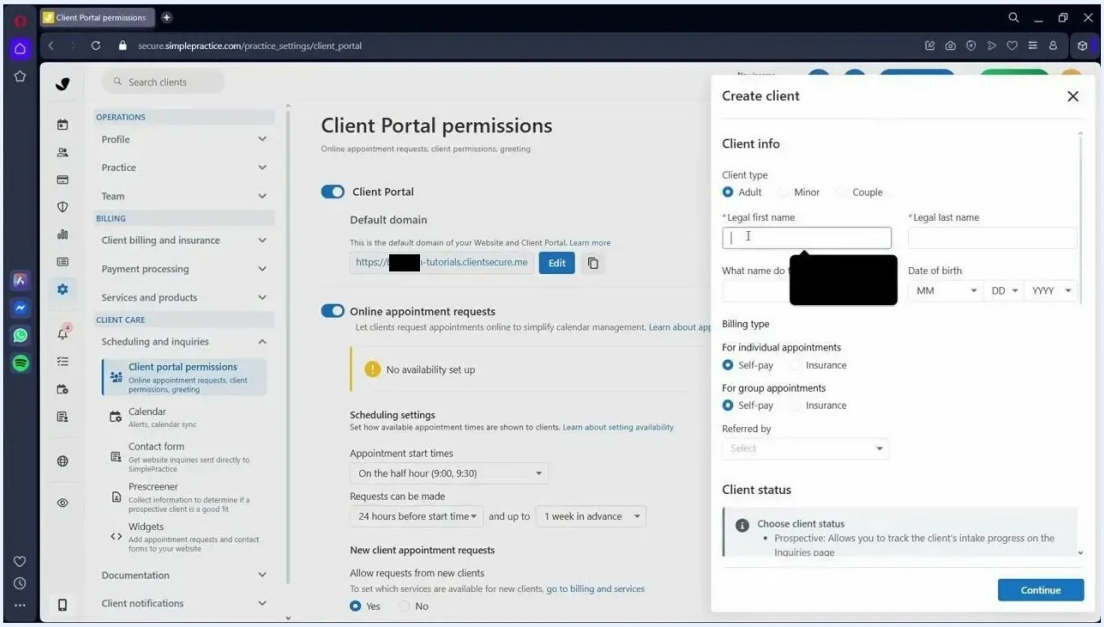
1. In the **Client Portal permissions** section, find the **Client Portal** toggle switch.
2. Make sure the switch is ON (blue). This enables the portal for your practice.
3. Confirm that your default portal domain is displayed, for example https://bm-tech-tutorials.clientsecure.me.

4. Click **Save changes** if you made any adjustments.



Client Portal permissions screen with the portal toggle on and the default domain shown

> **Note:** If the client portal is not enabled, clients cannot log in or receive invitations. This is the most important starting point.

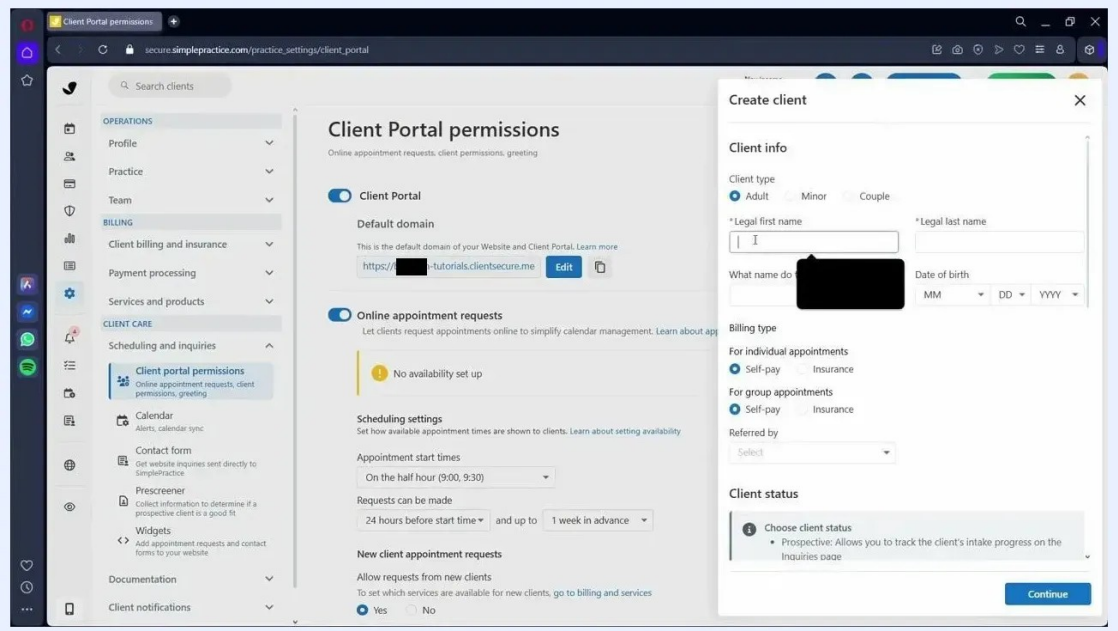


Client Portal permissions screen with the toggle on and additional settings visible

Step 4: Create a client

1. Click the **plus (+) button** at the top of the screen.
2. Select **Create Client** from the dropdown menu.
3. In the **Create client** panel, enter the client's details:

    - **Client type:** Choose Adult, Minor, or Couple.
    - **Legal first name:** Enter the client's first name (for example, "Techy").
    - **Legal last name:** Enter the client's last name (for example, "Tech").
    - **What name do they go by?** (optional): Enter a preferred name if applicable (for example, "T").
    - **Date of birth:** Select the correct date (for example, November 18, 1999).
    - **Billing type:** Choose Self-pay or Insurance for both individual and group appointments.
    - **Client status:** Choose the appropriate status, such as Prospective or Active.

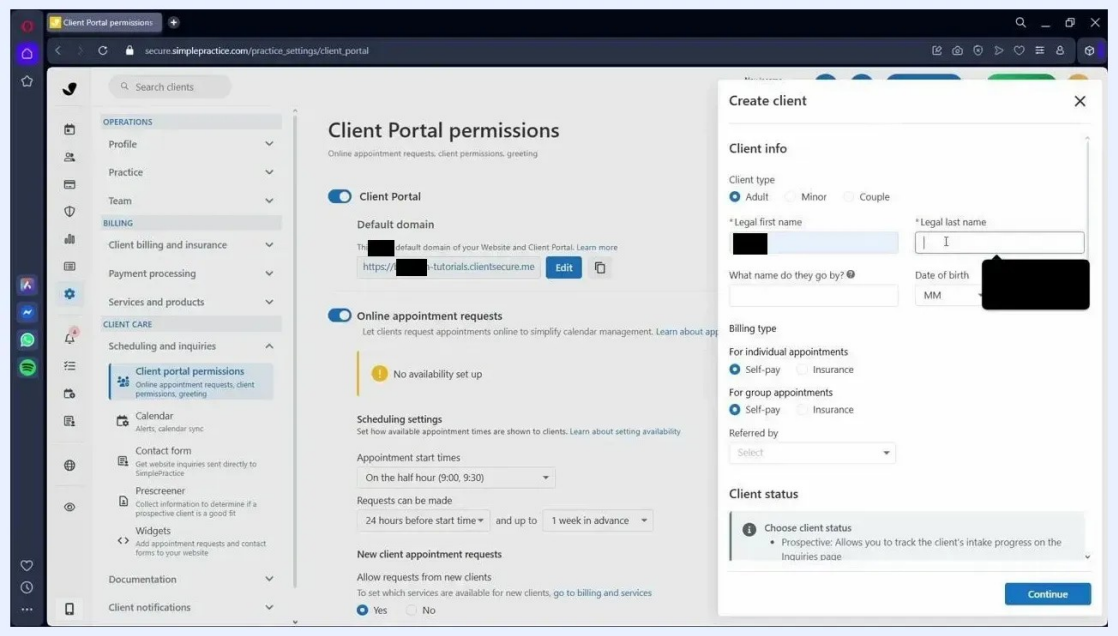


Create client panel with fields for name, date of birth, and billing type

Step 5: Add the client's email address

1. Scroll down to **Contact details**.

2. Click **Add email** and carefully enter the client's email address. SimplePractice sends the portal invitation to this address.

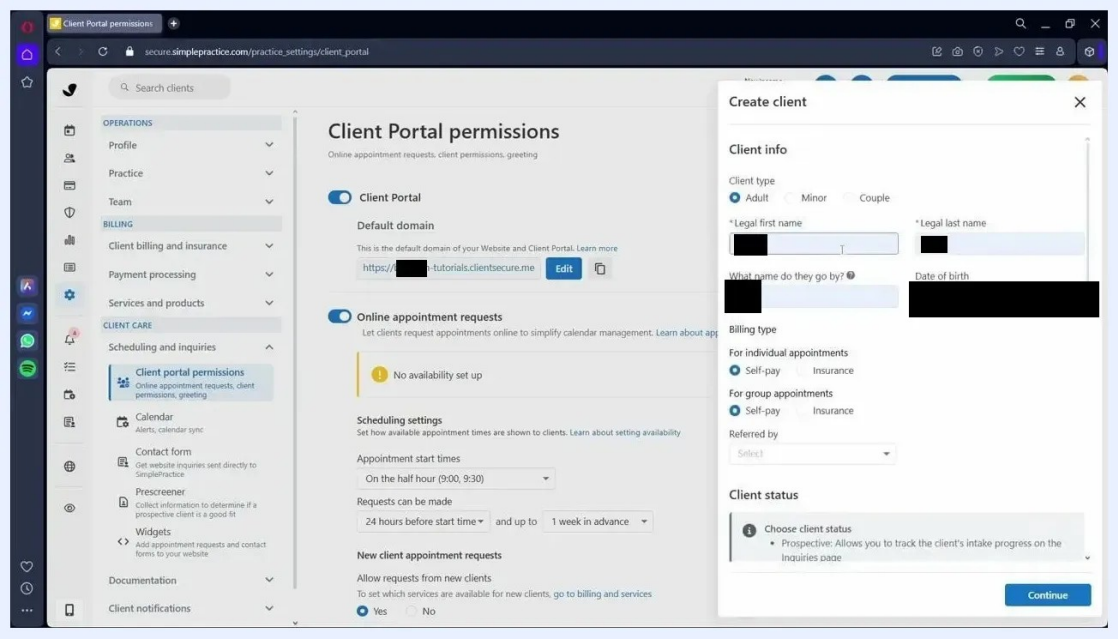


Create client panel with the email entry field highlighted

> **Tip:** Double-check the spelling of the email address. Advise your client to look for an email from your practice and to check their spam or promotions folder if they don't see it.

Step 6: Save the client to send the invitation

Complete any other required fields, then click **Continue** to save the client. SimplePractice automatically sends an invitation email with the client portal link to the address you entered.



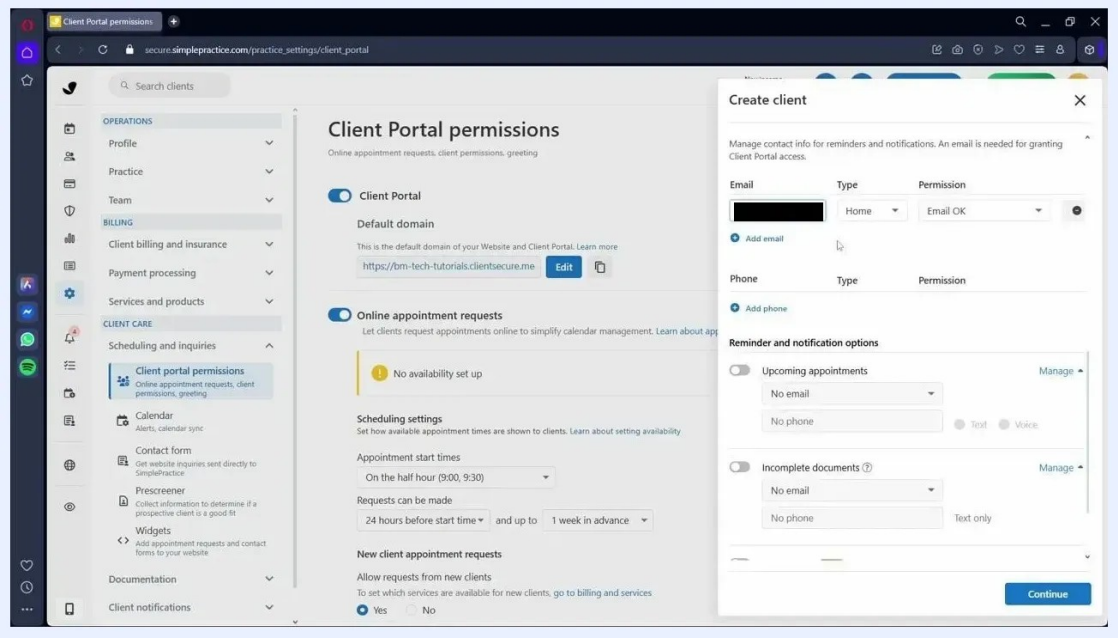
Create client panel with the client information fields filled out

Step 7: Invite an existing client from their profile

If the client already exists, send the invitation from their profile.

1. Open the client's profile from the **Clients** section.
2. Click **Edit** and go to the **Client Portal** section.

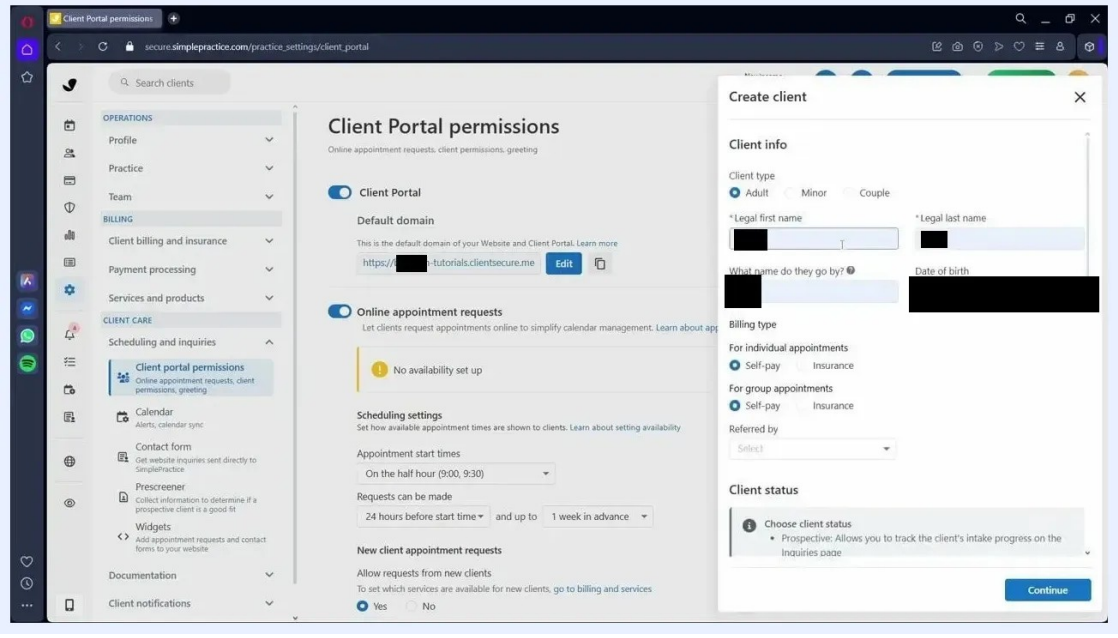
3. Click **Send Invitation** or **Send Email** to send the portal link.



Client profile screen showing intake and portal access confirmation

Step 8: Select the intake forms to send

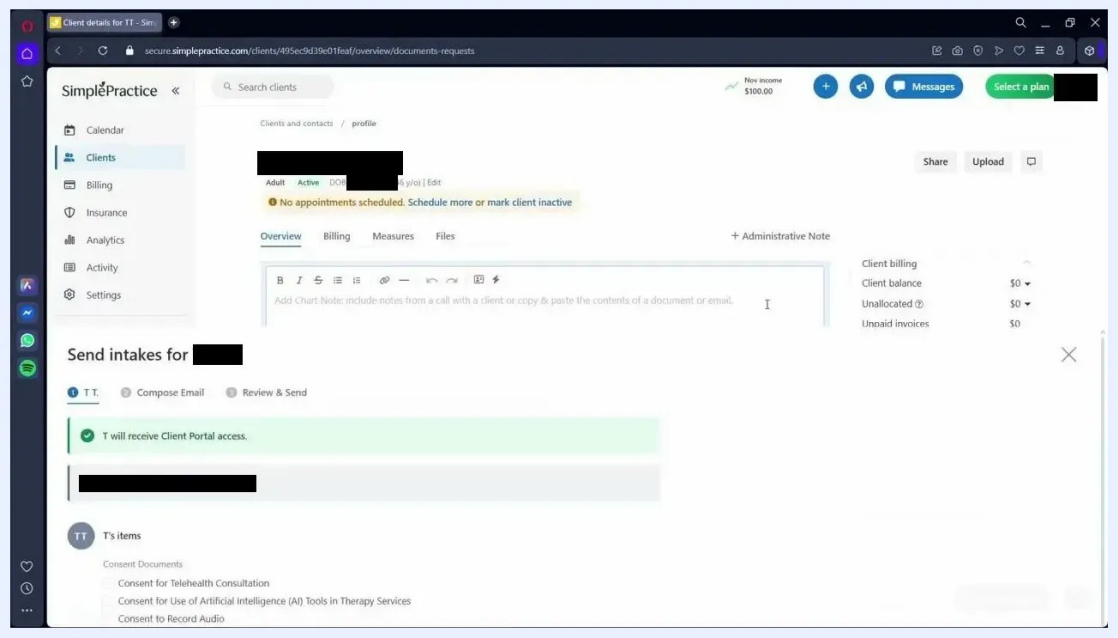
Choose which intake forms and consent documents to share with the client. Then click **Continue to Email**.



Send intakes screen with selected documents and the Continue to Email button

Step 9: Review the invitation email

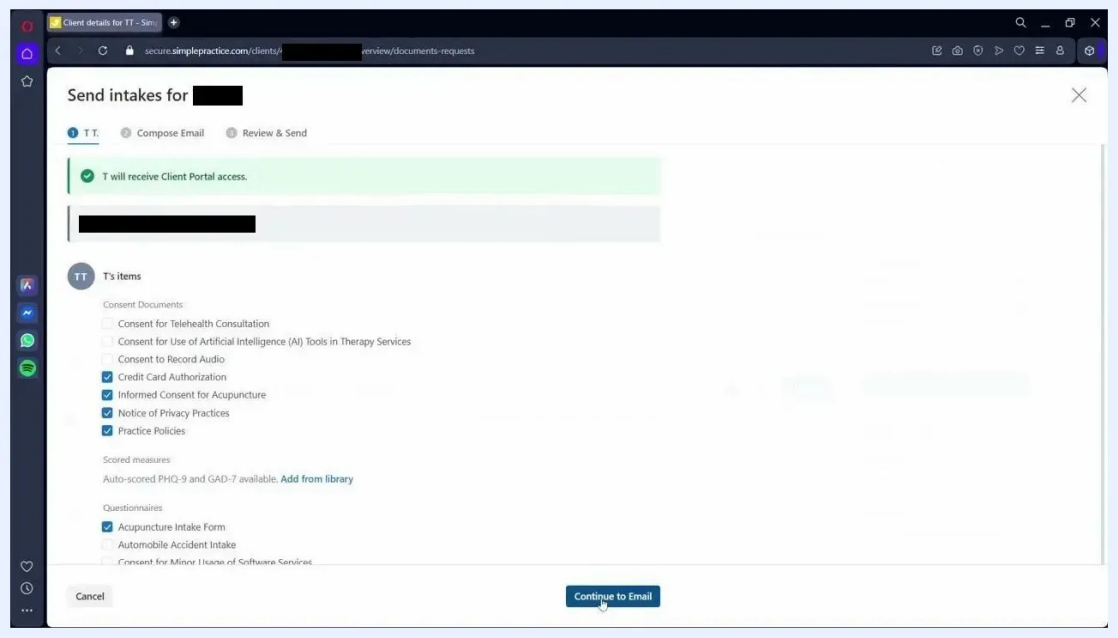
Review the default email message. Email customization may require a paid plan. Click **Continue to Review** to proceed.



Compose Email screen with the default invitation message and Continue to Review button

Step 10: Send the portal invitation

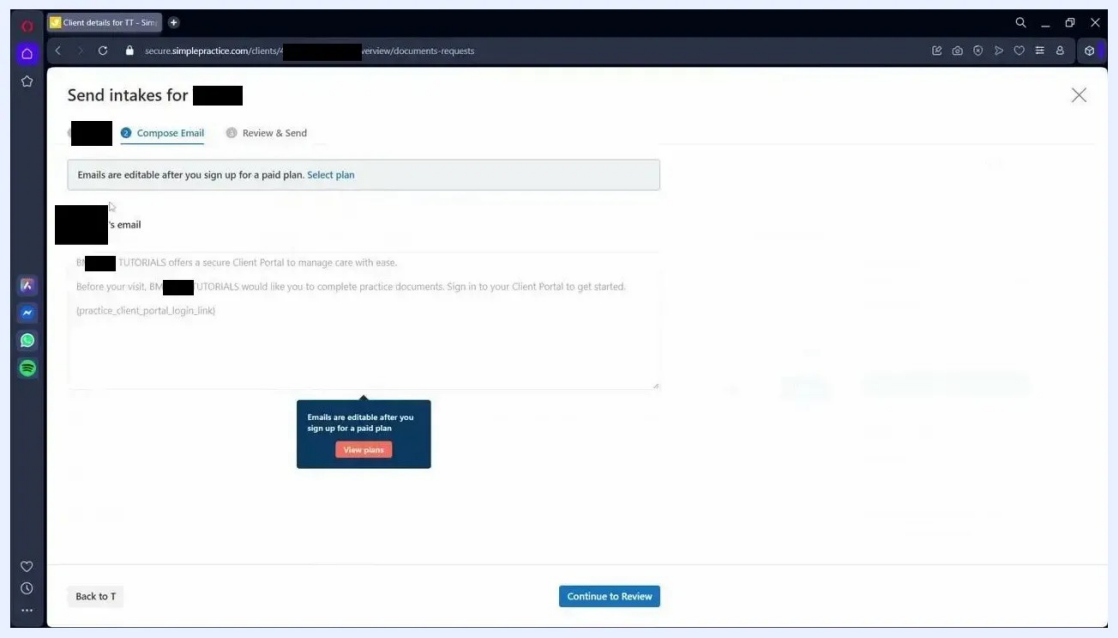
On the final review screen, confirm the items you are sharing. Then click **Share & Send Now** to send the invitation email to the client.



Review & Send screen with the Share & Send Now button highlighted

Step 11: Confirm the email was sent

A confirmation message appears to show the email is being sent. Wait for the process to finish, which should take only a few seconds.



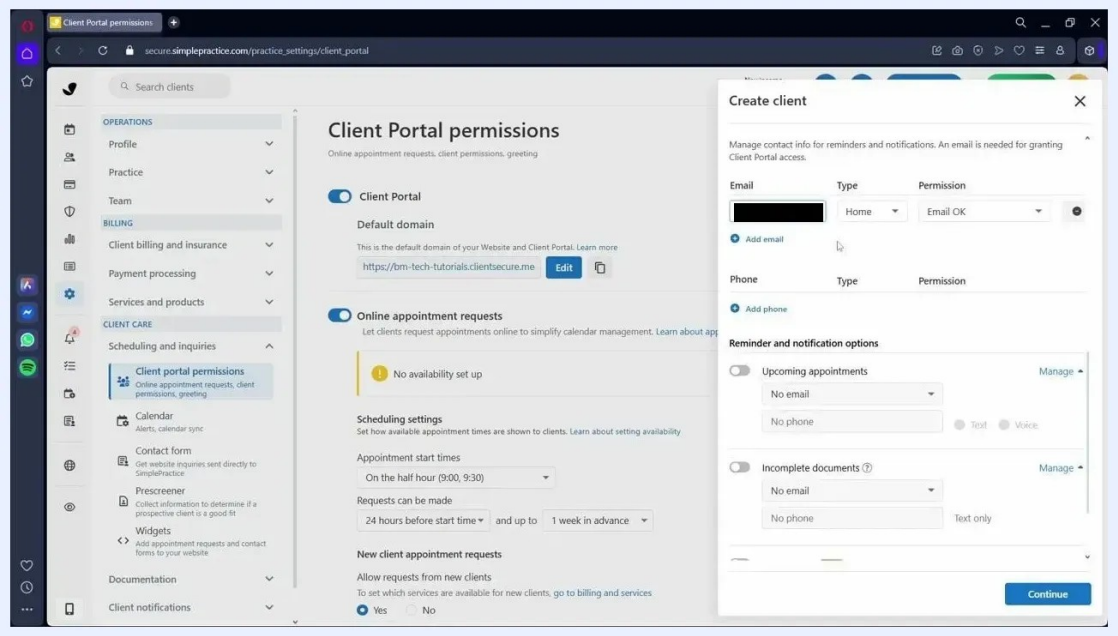
Confirmation dialog showing "Sending email now" after you click Share & Send Now

Step 12: Share your full client portal URL (optional)

If you want to give clients direct access, you can share your practice's full client portal URL.

1. Go to **Settings** in the left navigation menu.
2. Select **Client Portal Permissions** under **Client Care**.
3. Copy the full URL displayed under **Default domain** (for example, https://bm-tech-tutorials.clientsecure.me).

4. Paste the link into your welcome messages or appointment reminders as needed.



Client Portal permissions screen with the portal URL highlighted and the client creation panel open

> **Important:** Don't include any sensitive information in the same message as the portal link. Keep the message simple and remind clients to use the link only for secure access.

Best practices

- Send portal invitations from the client's profile. This ties the email to the correct client, keeps your records organized, and maintains security.
- Confirm the **Client Portal** toggle is ON before you invite anyone.
- Enter the client's email address when you create their profile so the invitation goes out automatically.

What's next

You now know how to send a client portal link in SimplePractice, either when you create a client or from an existing client's profile. You can also

share your default portal URL when clients need direct access. This gives your clients easy, secure access to their portal and required documents.