How to send intake forms in SimplePractice

This guide shows you how to send intake forms in SimplePractice. You create a new client, add their contact details and reminder preferences, and share consent documents, questionnaires, and a demographics form through the client portal. You also learn where to find the completed paperwork afterward.

Prerequisites

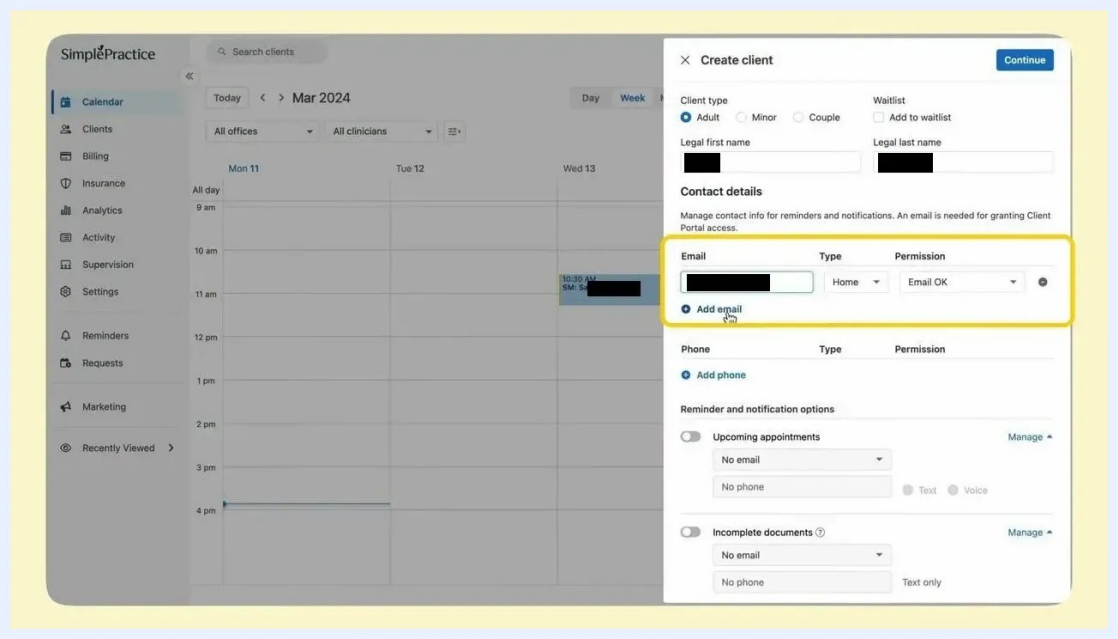
Before you start, have the following information ready:

- The client's type: Adult, Minor, or Couple.
- The client's legal first and last name.
- The client's email address. You need it to send an invite to the client portal, where the client fills out intake packets electronically.

Create the client

1. Open the Create client flyout

Click **Create** on the top bar to open the **Create client** flyout. The flyout appears on the right side of the screen, over your calendar. It contains fields for client type, legal first and last name, and contact details.



The Create client flyout open with empty fields for client type, legal first and last name, and contact details, with the calendar visible behind it.

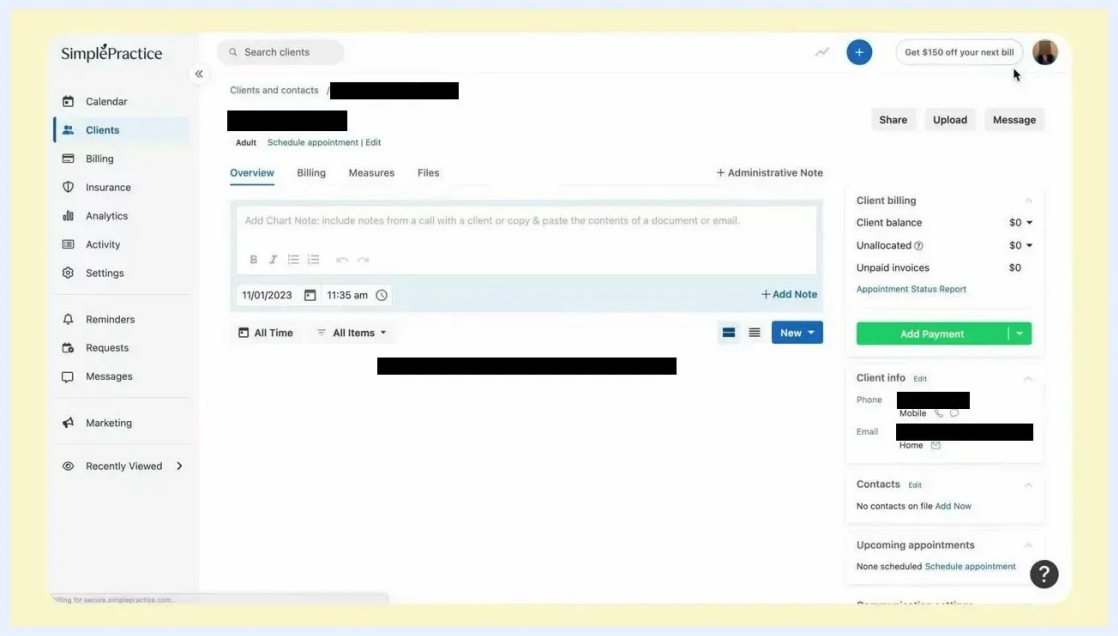
2. Select the client type and enter the name

Select the client type: **Adult**, **Minor**, or **Couple**. Then enter the client's legal first name and legal last name. If the client should be added to a waitlist, check **Add to waitlist**.

Some client types need extra setup:

- If the client is a minor, click **Minor** and use the **Contact** tab to add a parent or guardian.

- If the client is a couple, select **Couple** to link two clients who cannot see each other's paperwork.



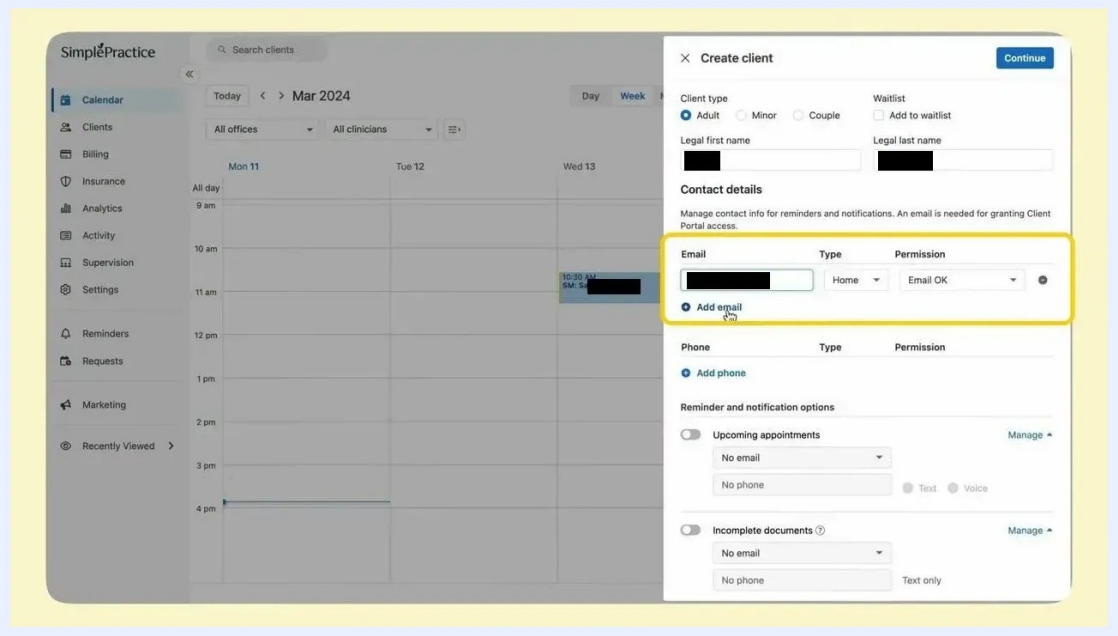
Client type set to Minor, with the Contact tab visible for adding a parent or guardian.

3. Add the client's email address

Adding an email address is essential for sending intake forms through the client portal. Follow these steps:

1. Under the Email section, click **Add email**.
2. Enter the client's email address, for example email@email.com.
3. Select the email type, for example **Home**.

4. Set the email permission, for example **Email OK**.



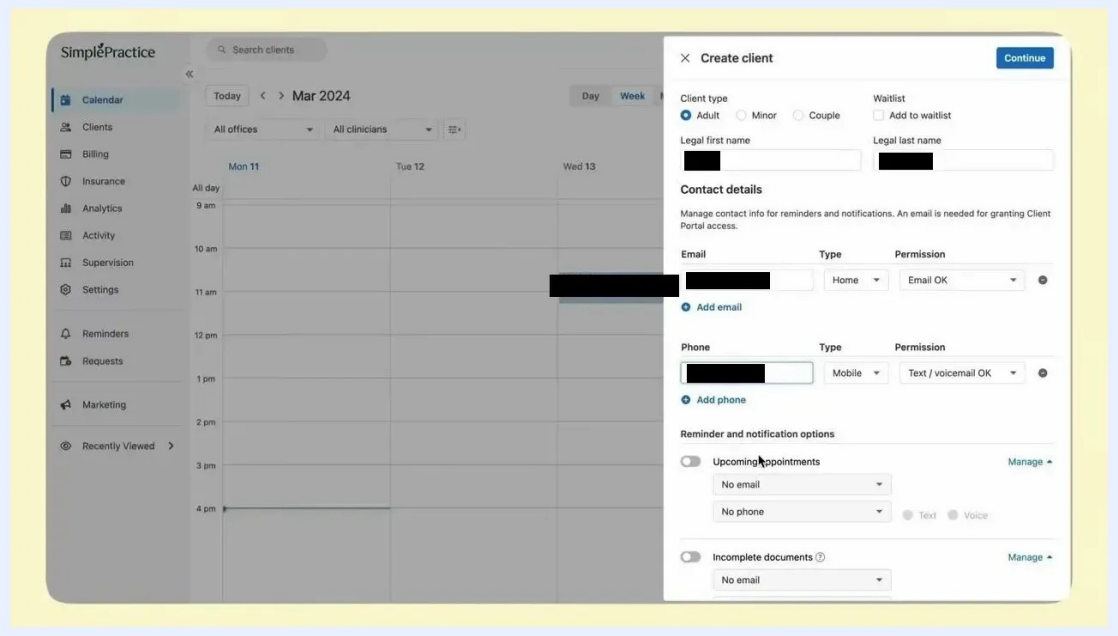
The client's email address entered as email@email.com, with the type set to Home and the permission set to Email OK.

4. Add the client's phone number

Follow these steps:

1. Under the Phone section, click **Add phone**.
2. Enter the client's phone number, for example (555) 555-5555.
3. Select the phone type, for example **Mobile**.

4. Set the phone permission, for example **Text / voicemail OK**.



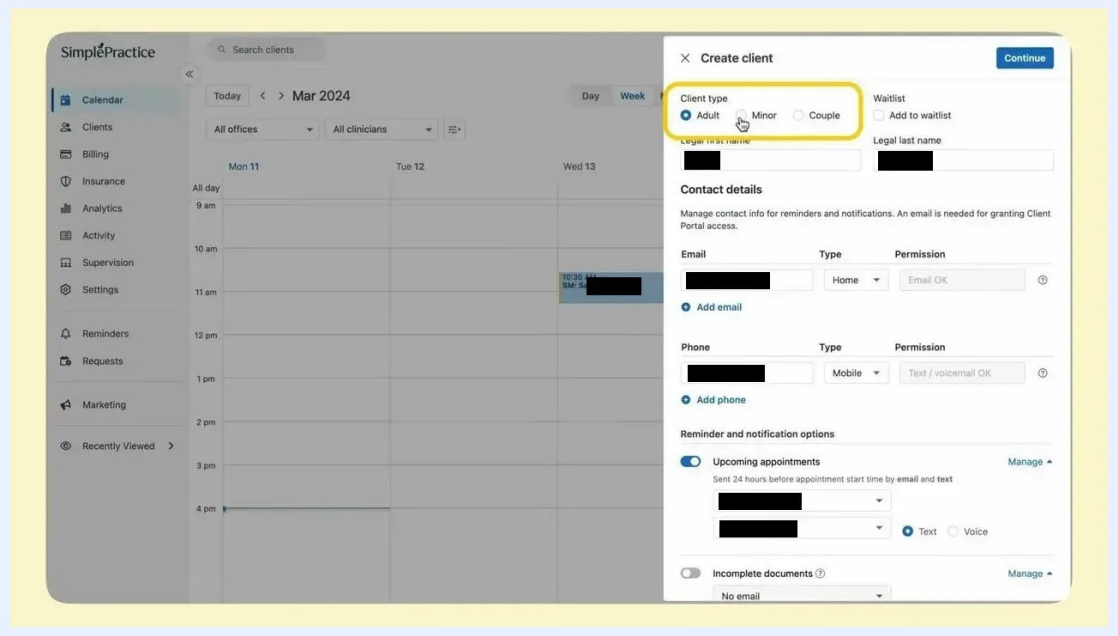
The client's phone number entered as (555) 555-5555, with the type set to Mobile and the permission set to Text / voicemail OK.

5. Configure appointment reminders

Under **Reminder and notification options**, set the reminders the client wants:

1. Toggle **Upcoming appointments** if the client wants automatic appointment reminders.
2. Choose the reminder method or methods, such as email, text, or voice.
3. Enter the email address, phone number, or both, to receive the reminders.

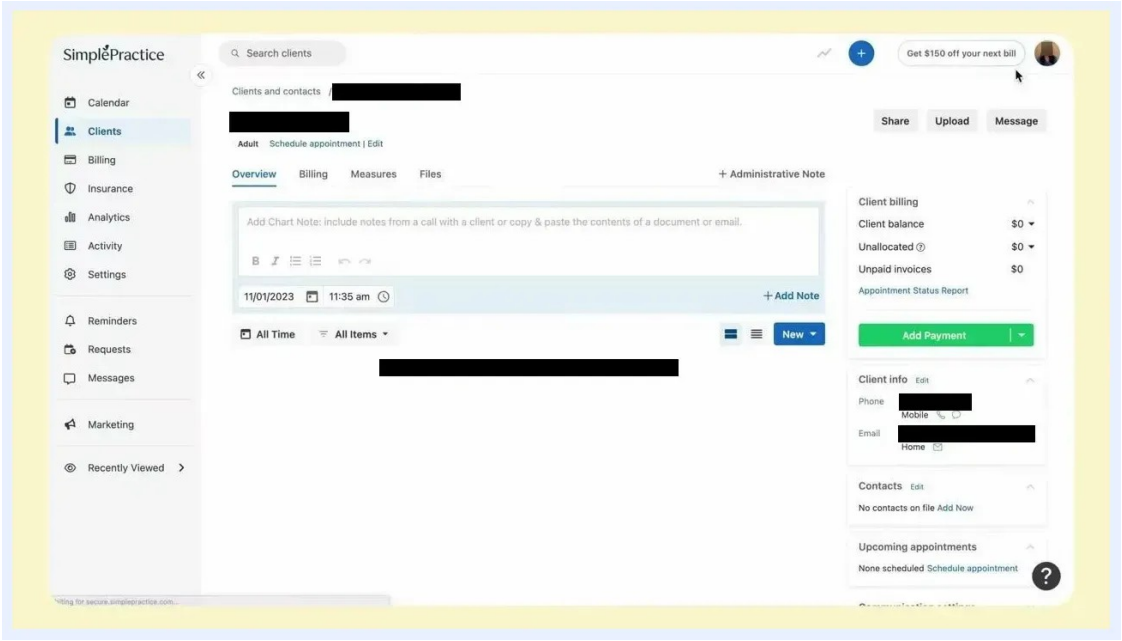
You can also configure reminders for **Incomplete documents**.



The Upcoming appointments reminder toggled on, with the email and phone fields filled in and options for text or voice reminders.

6. Create the client profile

Click **Continue** in the upper right of the flyout. SimplePractice creates the client profile. If you entered an email address, the **Send intakes** window appears. If you want to wait before sending the intake packet, close this window without sending.



The newly created client profile for Jamie Appleseed, showing the overview, billing, measures, files, and client info.

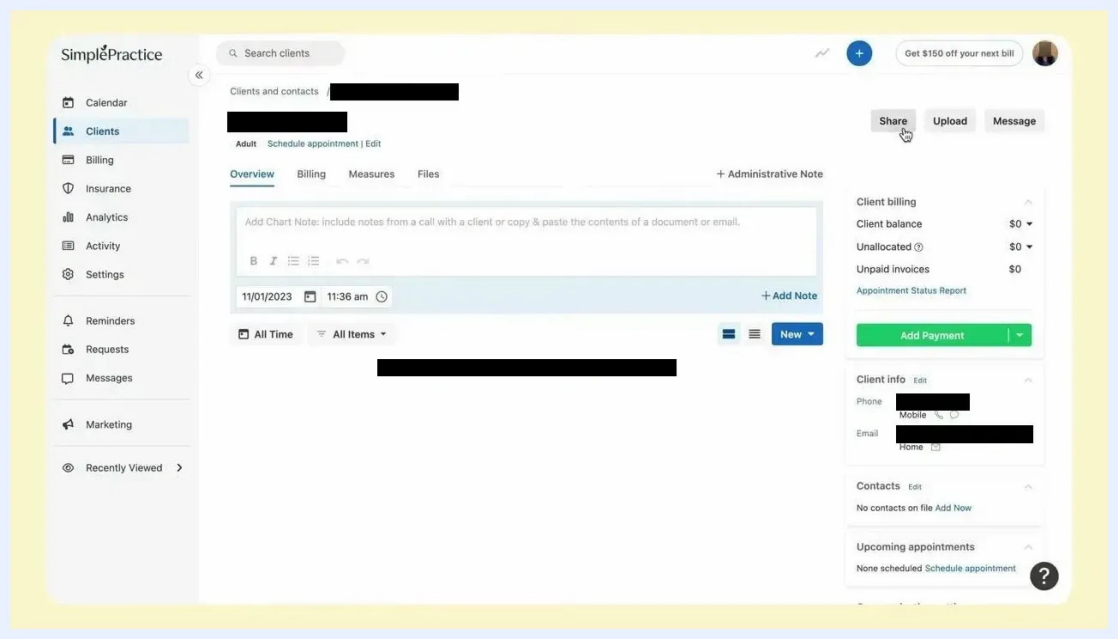
Send the intake forms

7. Open the client profile

If you closed the **Send intakes** window, search for the client by name using the search bar. Click the client's name, for example **Jamie Appleseed**, to open their profile.

8. Click Share

Click **Share** in the upper right corner of the client profile.



The Share button highlighted in the upper right corner of the client profile for Jamie Appleseed.

9. Select the documents to send

The **Send intakes** window walks you through three steps: select documents, compose the email, and review.

1. Check the boxes for the consent documents, questionnaires, and demographics form you want to send. Examples include **Consent for Telehealth Consultation**, **Informed Consent for Psychotherapy**, **Notice of Privacy Practices**, **Payment policies**, **Practice Policies**, **PHQ-9**, and **Demographics form**.
2. Click **Continue to Email** to move to the next step.

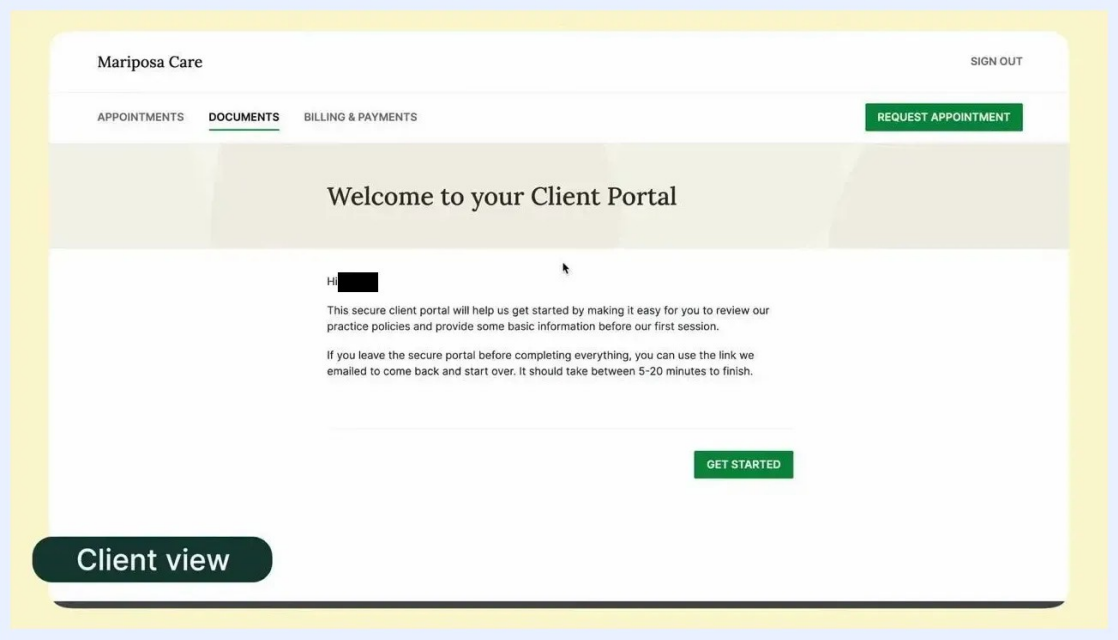
10. Review the documents and click Share & Send Now

On the **Review & Send** page, verify the documents selected for sharing. In this example, **Sharing 7 items with Jamie** lists:

- Consent for Telehealth Consultation
- Notice of Privacy Practices
- Informed Consent for Psychotherapy
- Practice Policies

- Telehealth instructions.pdf
- PHQ-9
- Demographics form

Make sure the banner says "Jamie will receive Client Portal access." Optionally, click **View Message** to preview or edit the welcome email text. Then click **Share & Send Now** to send the intake packet.

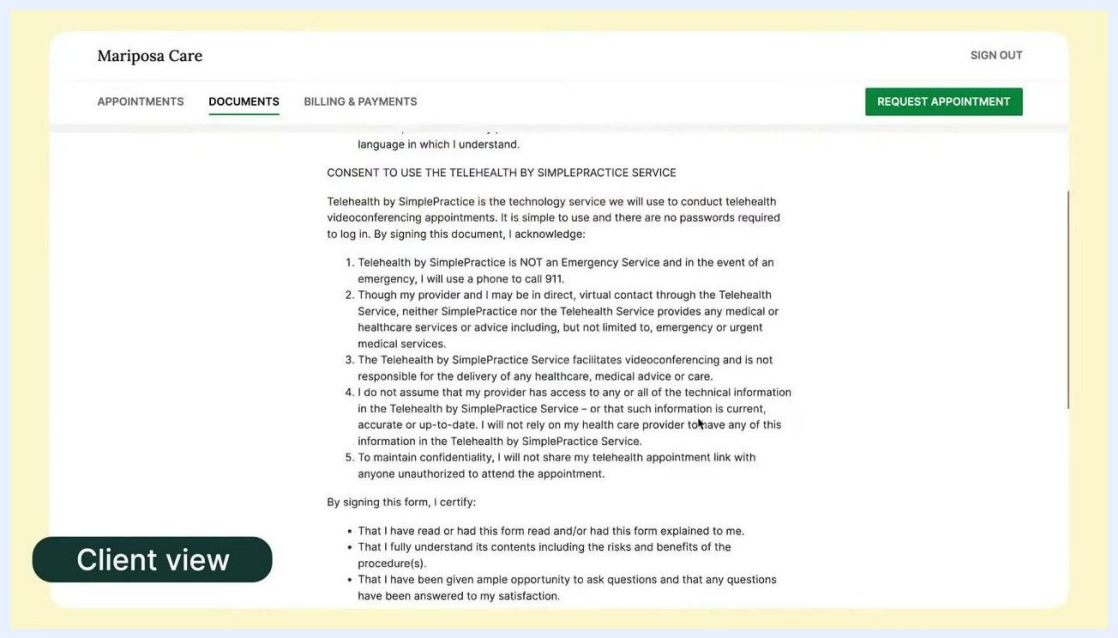


The Send intakes review page showing 7 documents selected for Jamie Appleseed, with the Share & Send Now button highlighted.

The client receives a welcome email with a secure sign-in link to the client portal. When the client clicks the link, they are signed in automatically and securely.

11. Confirm the items were sent

After you send the packet, a green notification appears at the top of the client profile: "Items sent to Jamie Appleseed." You return to the client's profile page, where you can continue managing their information.



The client profile for Jamie Appleseed with a green banner reading Items sent to Jamie Appleseed.

Review the completed intake paperwork

12. Find the completed documents

When the client completes and submits the forms, the signed consent forms and intake documents are saved automatically as PDFs in their stored files. Each document is timestamped with the client's name and the date and time of signature.

To review them, open the **Files** tab in the client's profile. Confirm that each form is marked **Completed** and is available for download or review. Examples include PHQ-9, Demographics form, Telehealth instructions, Practice Policies, Informed Consent, Notice of Privacy Practices, and Consent for Telehealth Consultation.



A PDF viewer displaying the completed Practice Policies document stored in the client's files.

13. Prepare for the session

Review the intake paperwork before your session. This helps you become familiar with the client's information so you can use your session time to connect more effectively.

Summary

You now know how to send intake forms in SimplePractice. You created a client, added their email, phone number, and reminder preferences, and shared the documents with **Share & Send Now**. Once the client completes the forms, you can review the signed PDFs in the **Files** tab.