# How to use telehealth in SimplePractice

This guide shows you how to use telehealth in SimplePractice, from signing up for a free trial to scheduling a video appointment and running the session. It also covers the calendar, tasks, appointment requests, prospective clients, and client billing document settings.

## Prerequisites

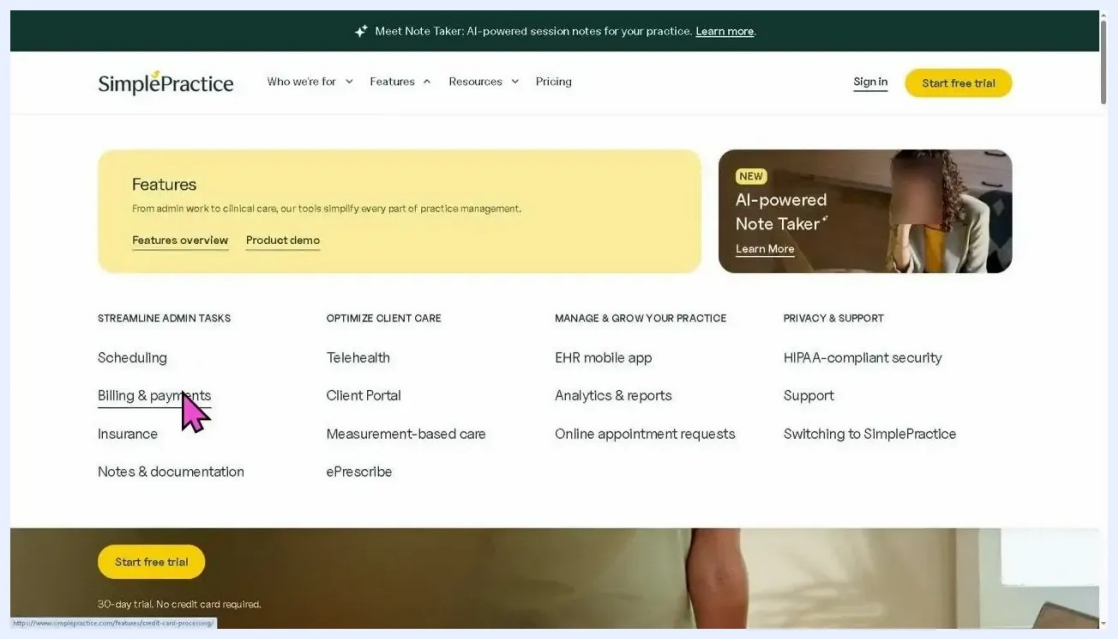
Before you begin, make sure you have the following:

- An email address to register for a SimplePractice account. The free 30-day trial requires no credit card.
- A stable internet connection for video calls.
- A browser that can use your camera and microphone, and your permission to allow that access when prompted.

# Sign up for a free trial

## 1. Open the Features menu

Go to the official SimplePractice website. In the navigation bar at the top, you see options such as **Who we're for**, **Features**, **Resources**, and **Pricing**. Click **Features** to view the available platform features.

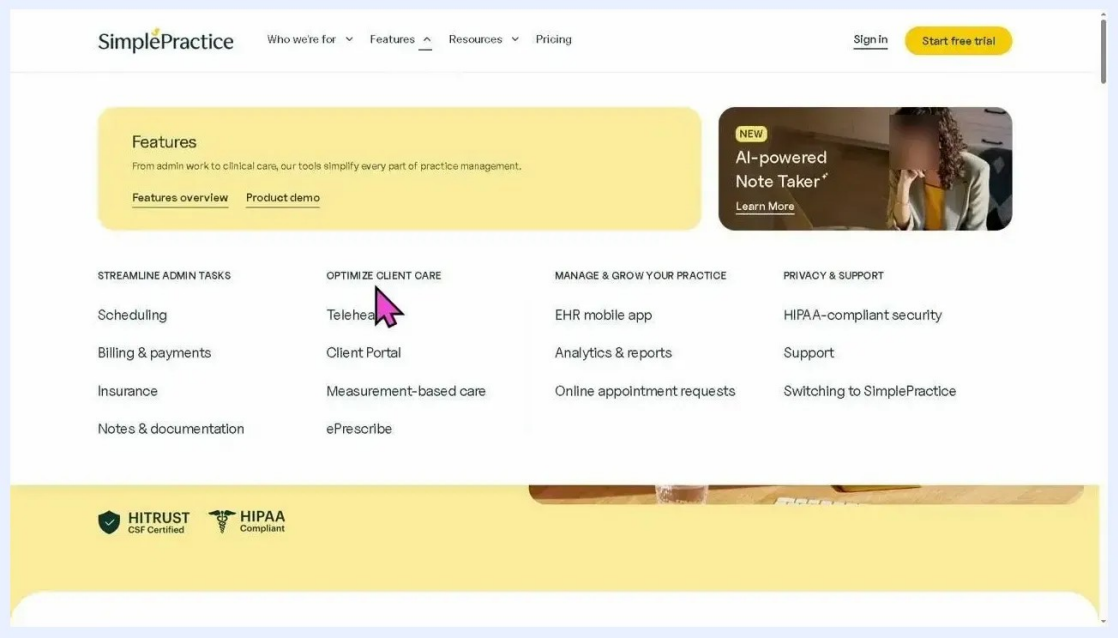



**SimplePractice website Features menu listing Scheduling, Telehealth, Client Portal, and other features, with a yellow Start free trial button**

## 2. Open the Telehealth feature page

In the features menu, under **Optimize Client Care**, click **Telehealth**. The Telehealth feature overview opens.

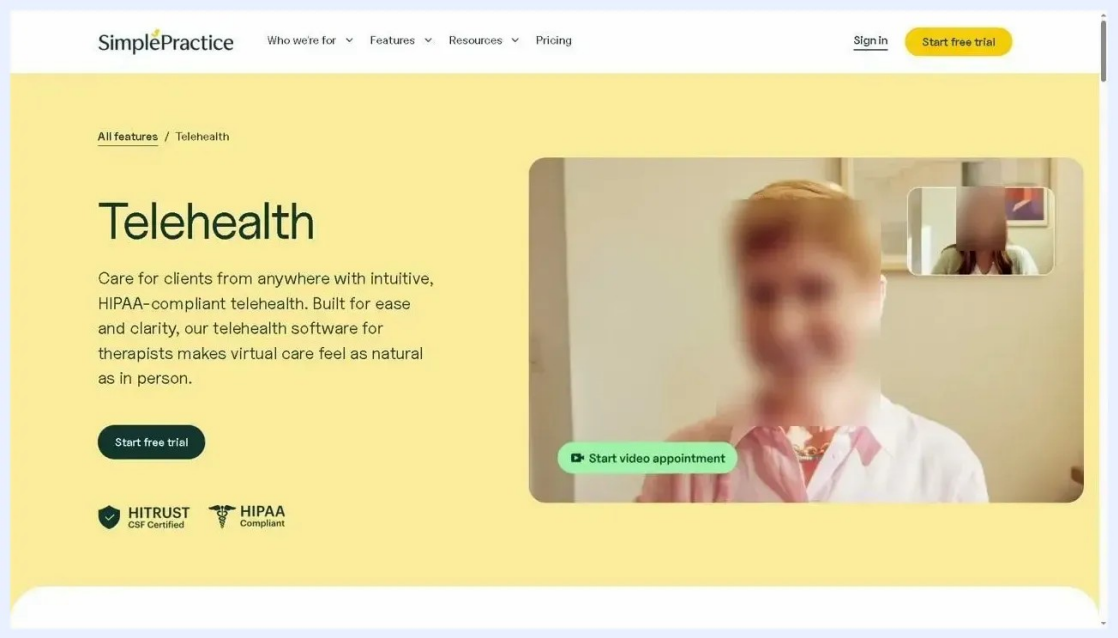
Read the description: "Care for clients from anywhere with intuitive, HIPAA-compliant telehealth. Built for ease and clarity, our telehealth software for therapists makes virtual care feel as natural as in person." Then click **Start free trial** or **Start video appointment** to continue.




**Telehealth feature page with a smiling woman on a video call and the Start free trial and Start video appointment buttons**

## 3. Enter your email address

On the "Let's get started" page, enter your email address and click **Next**. The page notes that your free 30-day trial awaits and no credit card is required.




**Sign-up page with the "Let's get started" heading, an email field, a Next button, and HIPAA and HITRUST compliance badges**

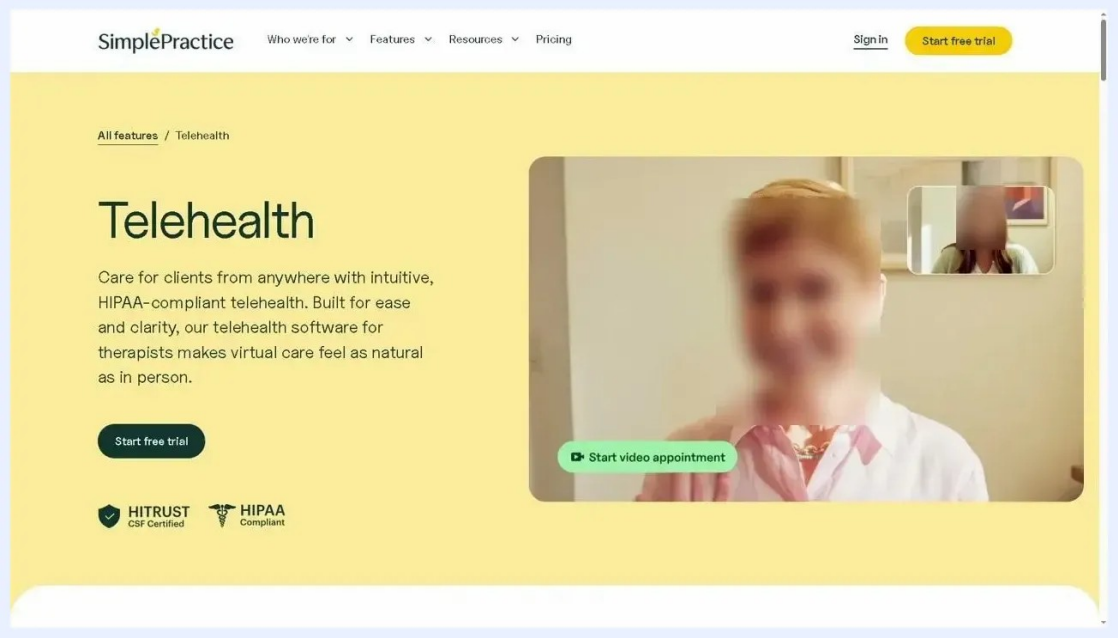
## 4. Complete your registration

Follow the on-screen instructions to finish registering and open the main platform.

# Get to know the calendar

## 5. Review the main dashboard

After you log in, the interface is clean, intuitive, and user-friendly. The left navigation panel includes Calendar, Clients, Billing, Insurance, Analytics, Activity, Settings, Notifications, Tasks, Requests, Inquiries, Marketing, and Recently Viewed. The main area shows your calendar by default.

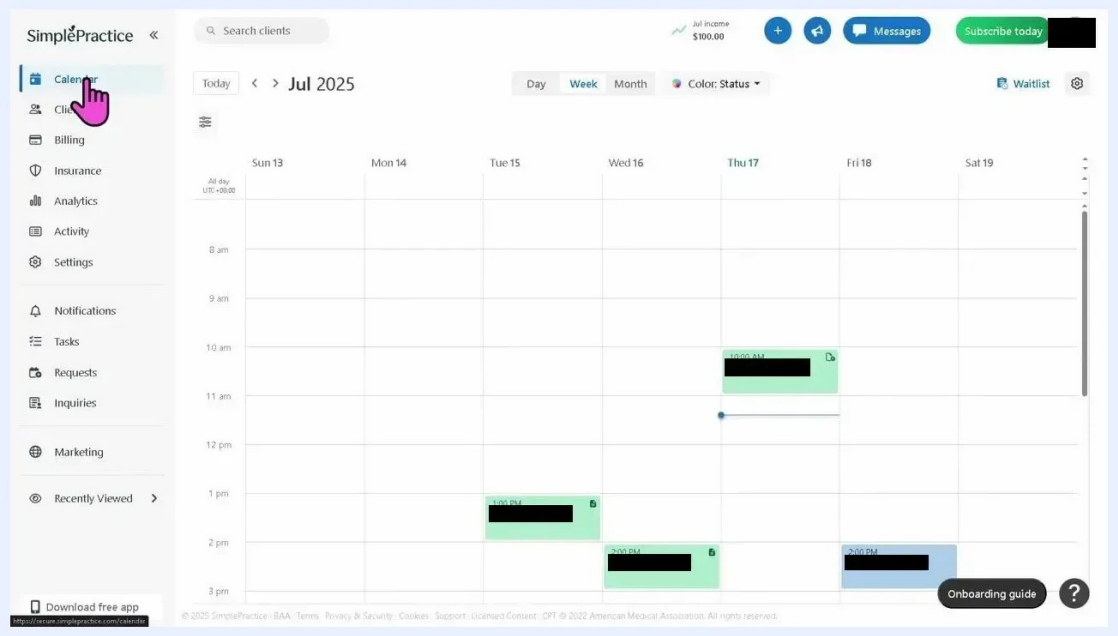



**SimplePractice dashboard showing the July 2025 calendar with the navigation panel on the left and scheduled appointments**

## 6. Use the calendar to view appointments

The calendar is the center of your scheduling. You can view upcoming appointments by day, week, or month, and the calendar color-codes appointments by status.

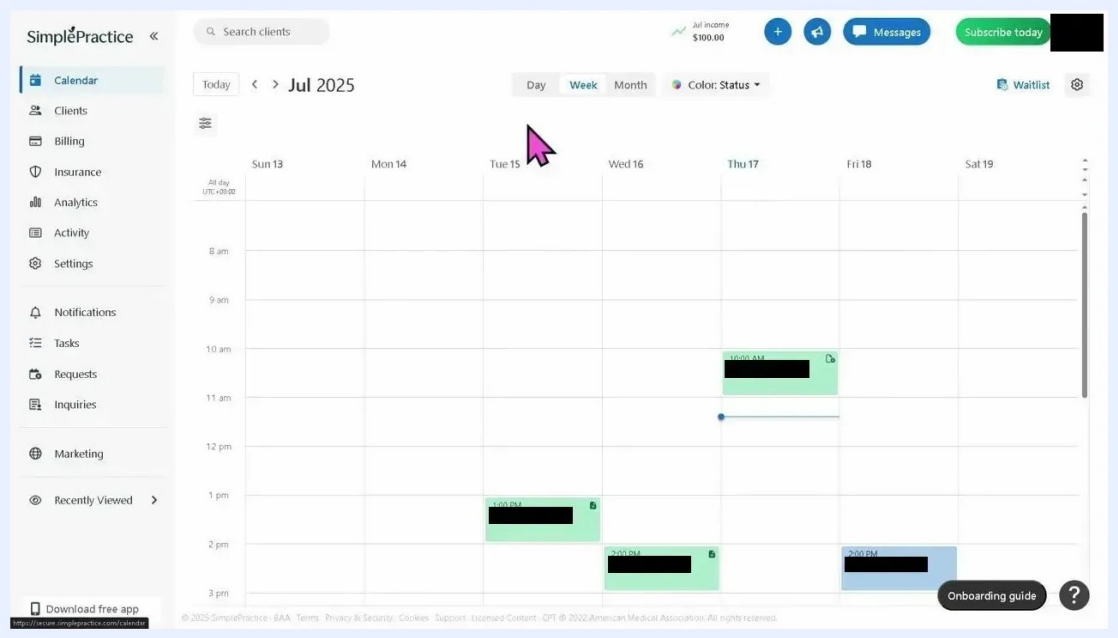
In the example, Jamie D. Appleseed has appointments at 10:00 AM, 1:00 PM, and 2:00 PM on Thursday, July 17.




**Calendar view with appointments for Jamie D. Appleseed and options to switch between day, week, and month views**

## 7. Switch between day, week, and month views

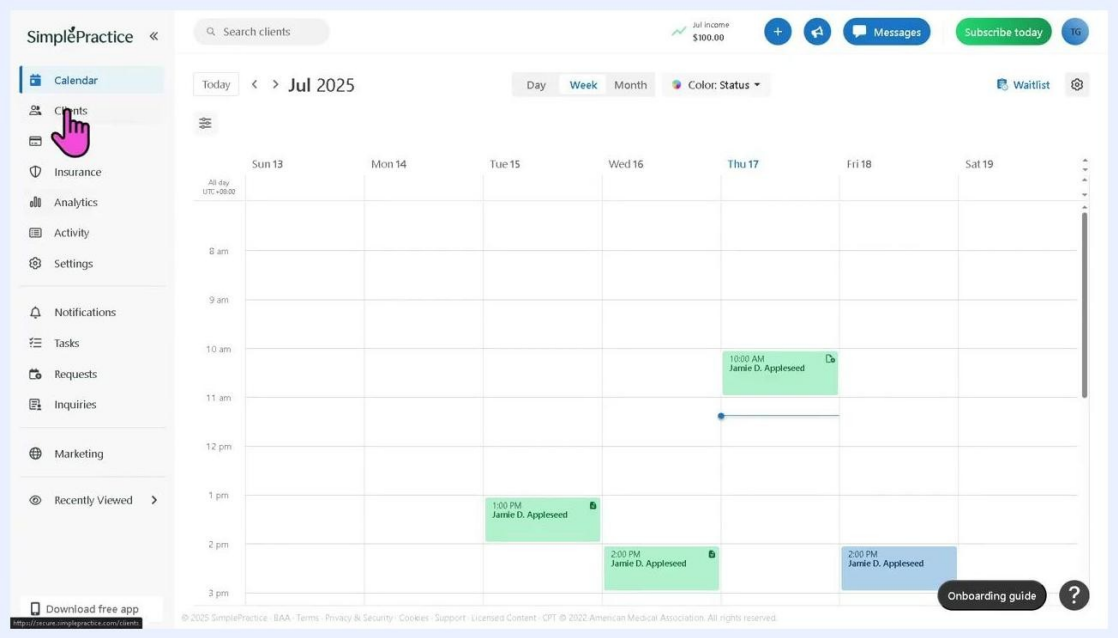
Use the **Day**, **Week**, and **Month** buttons above the calendar to manage your schedule efficiently. Click a specific day or appointment to view more details or make changes.




**Cursor pointing to the Week view, showing appointments for the week of July 13–19, 2025**

## 8. Open your client list

Click **Clients** in the left navigation panel to view or manage clients. From there, you can access client details, schedule appointments, and manage telehealth sessions.

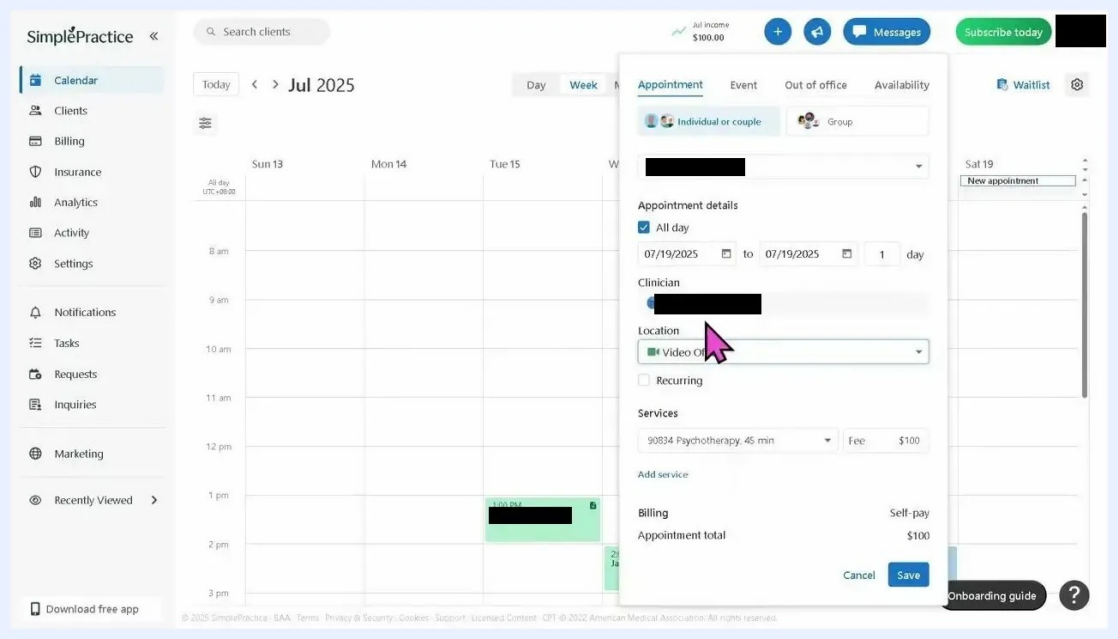



**Cursor pointing to Clients in the left navigation panel with the calendar still visible**

# Schedule a telehealth appointment

## 9. Select a date on the calendar

On the calendar, click the date you want, for example July 19th. The **New appointment** dialog opens, with options for client, date, location, and recurrence.



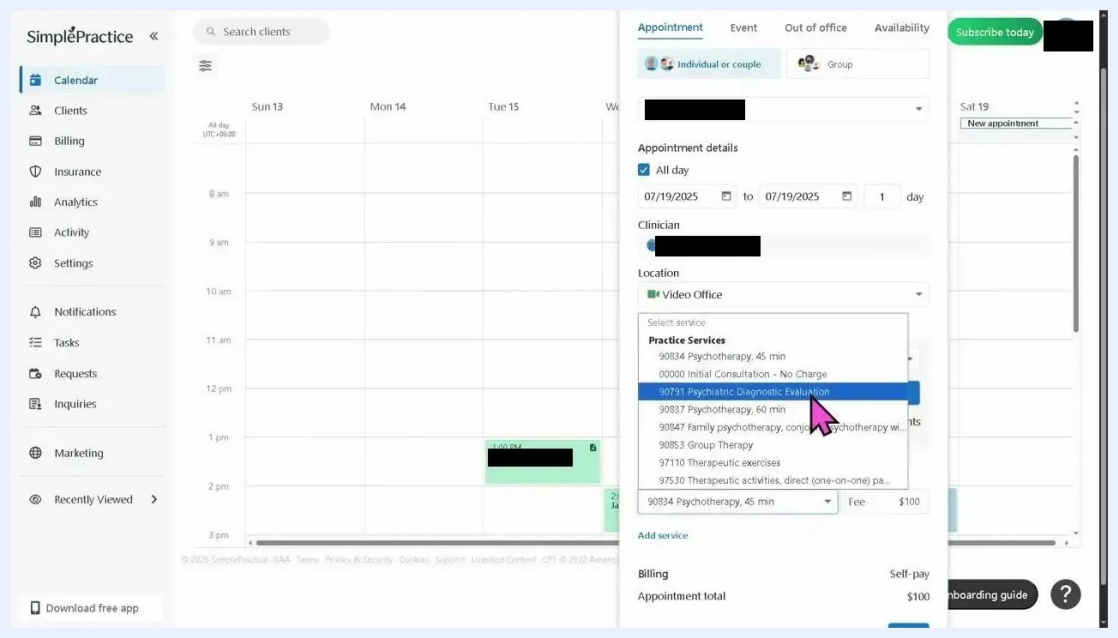

**New appointment dialog open for July 19, 2025, with options for client, date, location, and recurrence**

## 10. Select the client

In the **Search Client** field, type the client's name, for example Jamie D. Appleseed. Select the client from the dropdown list.

## 11. Set the location to Video Office

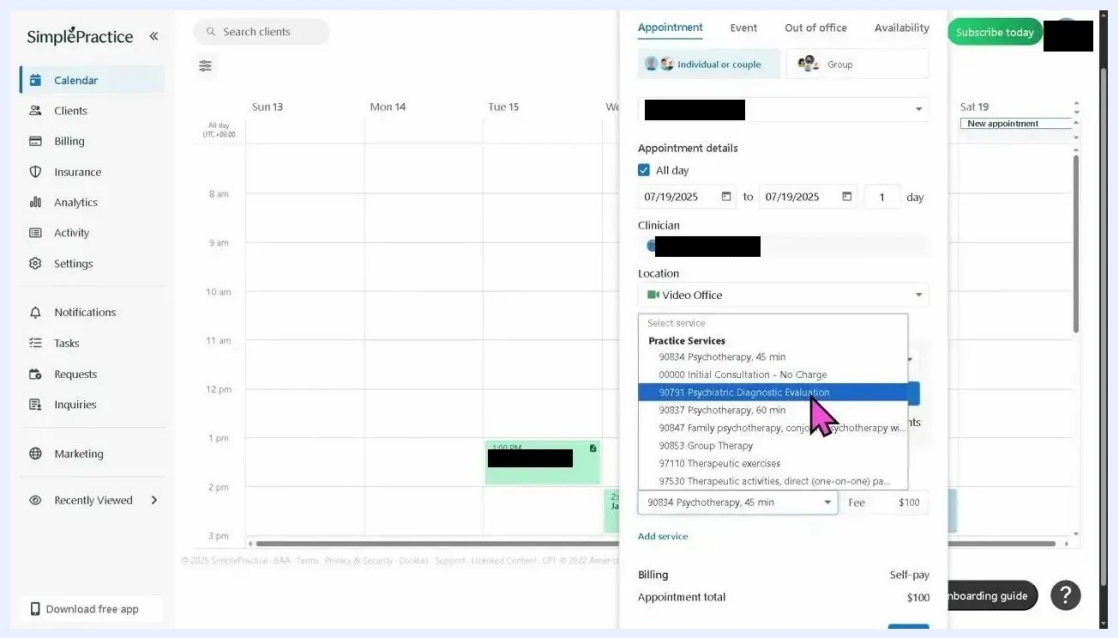
Under **Location**, select **Video Office** to make this a telehealth appointment. Make sure the correct clinician is assigned, for example Tim Gallagher.




**Appointment dialog with Video Office selected as the location, Jamie D. Appleseed as the client, and Tim Gallagher as the clinician**

## 12. Set the time and recurrence

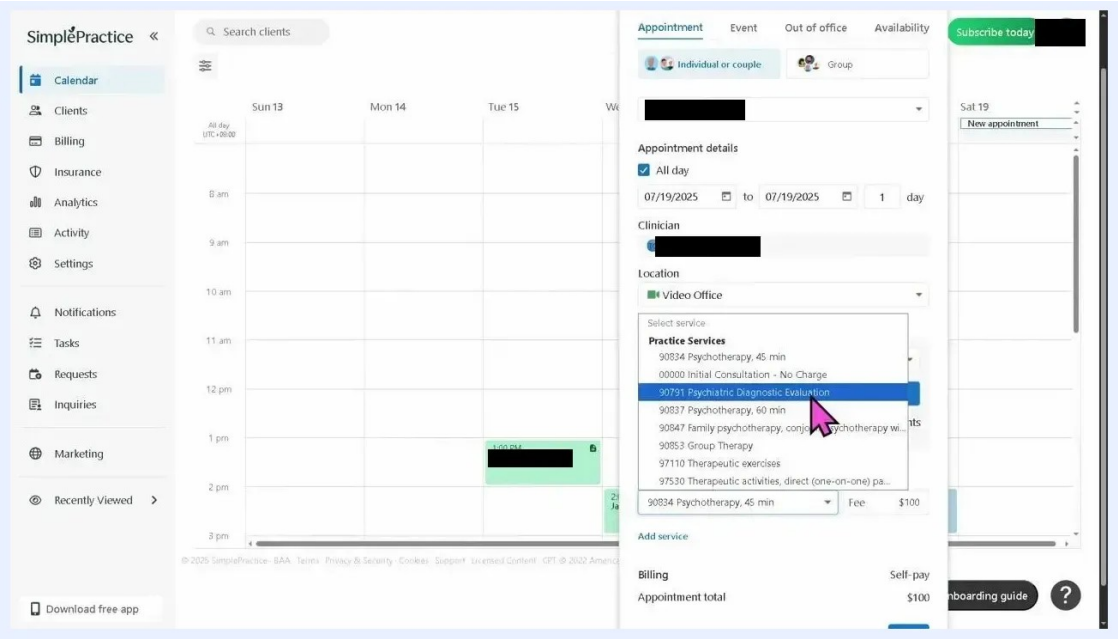
Specify whether the appointment is **All day**, or set specific times. To repeat the appointment, check the **Recurring** box and set the recurrence pattern. For example, set it to every 1 week on Saturday, ending after 30 events.




**Recurring appointment options showing weekly recurrence on Saturdays, ending after 30 events**

## 13. Select the service

Click the **Select service** dropdown and choose the appropriate service. For example, choose "00000 Initial Consultation – No Charge" for a first video meeting, or "90791 Psychiatric Diagnostic Evaluation" for an evaluation. The fee updates automatically based on the service you select.




**Service dropdown open, highlighting Initial Consultation (No Charge) and Psychiatric Diagnostic Evaluation**

## 14. Review and save the appointment

Confirm the client, date, location, recurrence, and service. Check that the billing section shows the correct fee, for example $0 for a no-charge consultation. Then click **Save** to create the appointment.

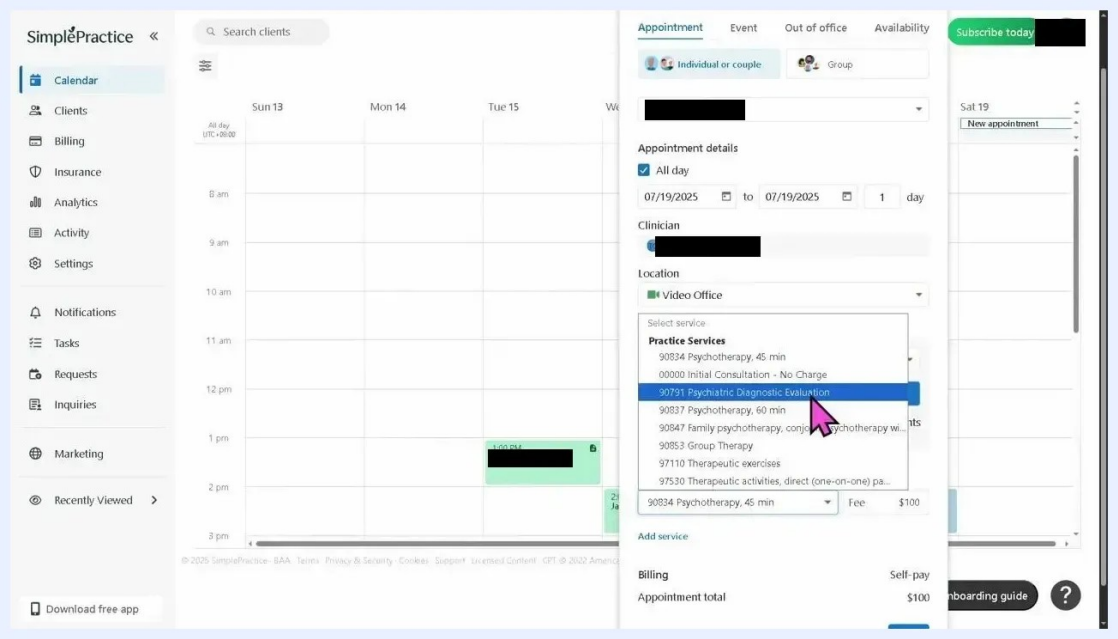
## 15. Find the appointment on your calendar

After you save, locate the appointment on your calendar. It shows the client's name, for example Jamie D. Appleseed, and a video icon that indicates a telehealth session.

# Run a telehealth session

## 16. Start the session

Make sure you have a stable internet connection for the video call. Then click the appointment on your calendar and click the green **Start video appointment** button.

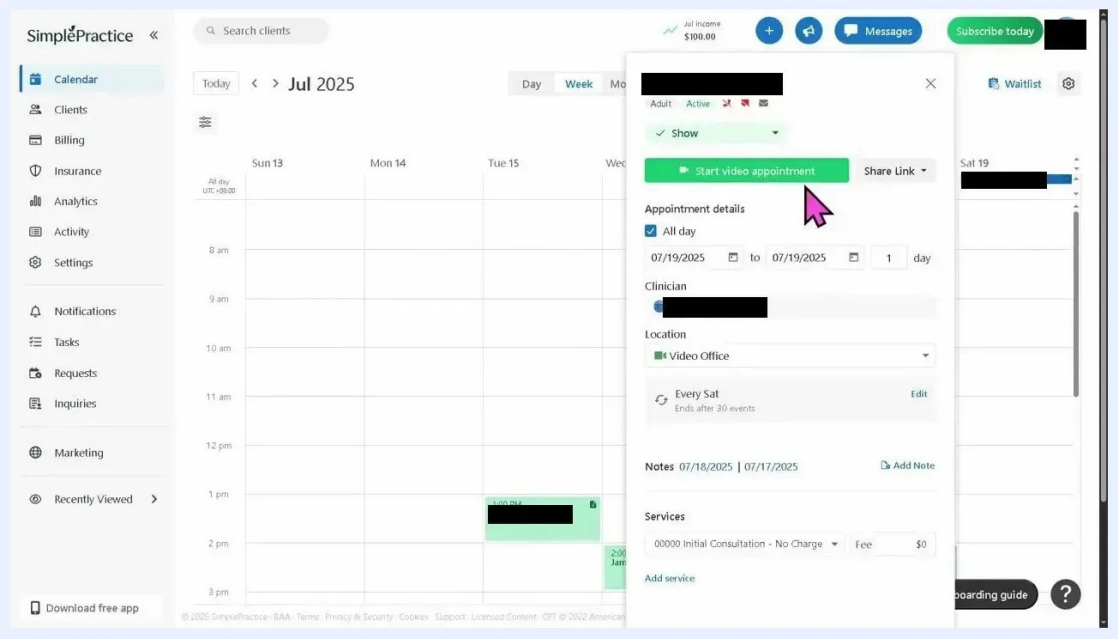



**Appointment details panel with the green Start video appointment button for Jamie D. Appleseed**

## 17. Allow camera and microphone access

A browser prompt appears, for example "video.simplepractice.com is asking you to use your camera and microphone." Click **Allow** to grant access.

If you use an Apple device, you may see an alert about emojis appearing during video calls because of Apple's reactions feature. SimplePractice does not control this feature.

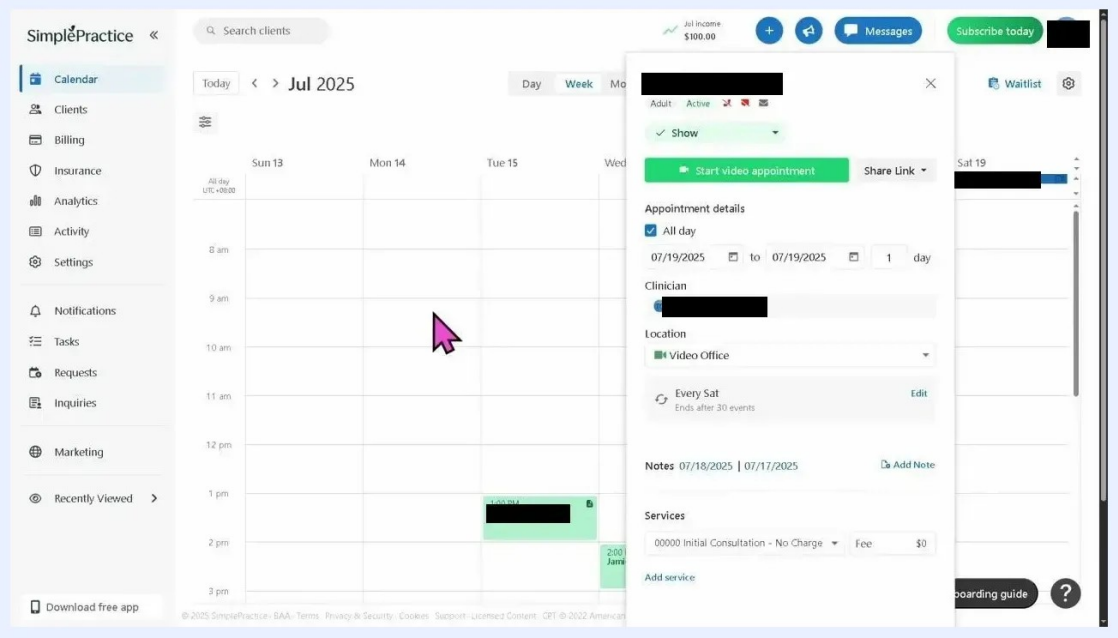



**Telehealth screen with a browser permission prompt for camera and microphone and an alert about Apple emoji reactions**

## 18. Handle early joins and device access errors

If you try to join too early, the appointment panel shows a message such as "You're a little early." You can join your appointment 10 minutes before the scheduled time.

If your browser cannot access your microphone or camera, a pop-up states "Can't access your microphone or camera." Close any apps or tabs that may be using them, then refresh the page. If the issue continues, restart your browser or computer.



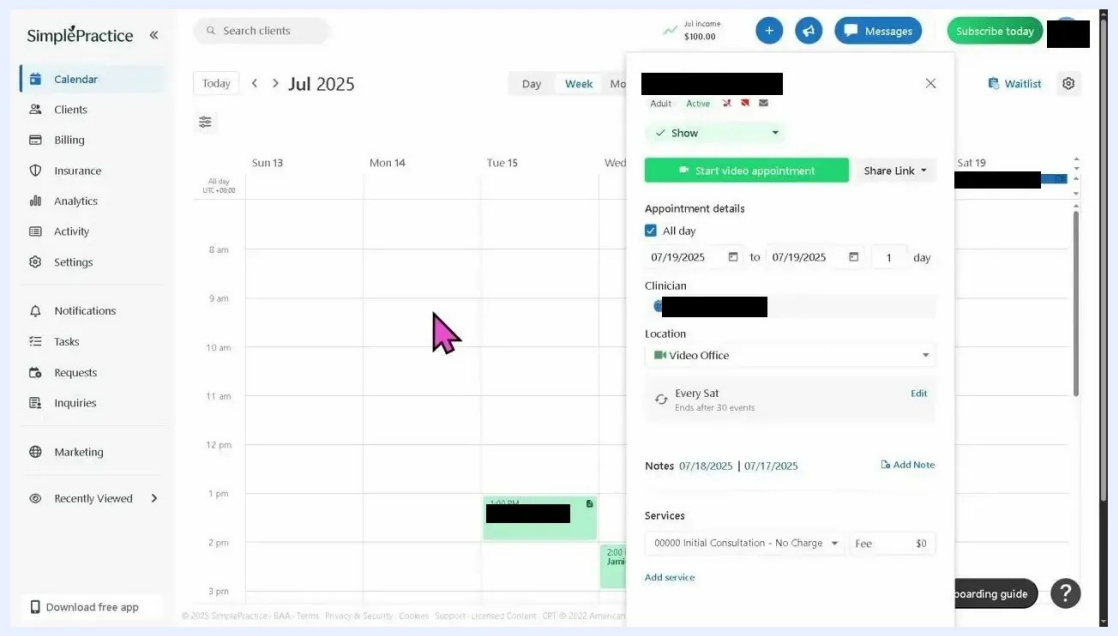

**Telehealth appointment screen with the "Can't access your microphone or camera" error and an early join notification**

## 19. Adjust telehealth settings as the host

Click the gear icon labeled **Telehealth settings** in the video call window to get more control as the host. You can adjust these controls:

- **Participant permissions:** Enable or disable chat, screen sharing/whiteboard, and background features.
- **Meeting access:** Enable the waiting room and a confirmation message before ending a session.

A browser prompt may ask for permission to use your camera and microphone. Click **Allow** to grant access.



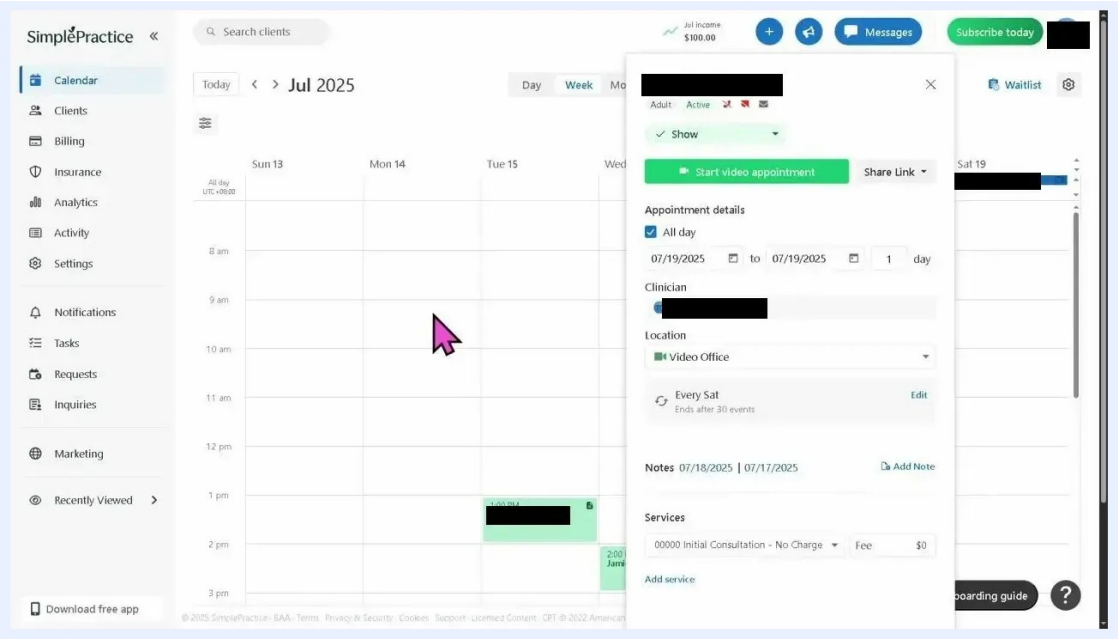

**Telehealth settings dialog showing host controls for chat, screen sharing, background, waiting room, and confirmation message**

## 20. End the session

When you finish, click the appropriate button in the video call interface to end the telehealth session.

### 21. Return to the calendar

Go back to the main calendar to manage appointments and use other features. The left navigation bar includes Calendar, Clients, Billing, Insurance, Analytics, Activity, Settings, Notifications, Tasks, Requests, Inquiries, and Marketing.




**Calendar view with appointment details for Jamie D. Appleseed and the navigation bar visible**

## Manage tasks, requests, and prospective clients

### 22. Create a task

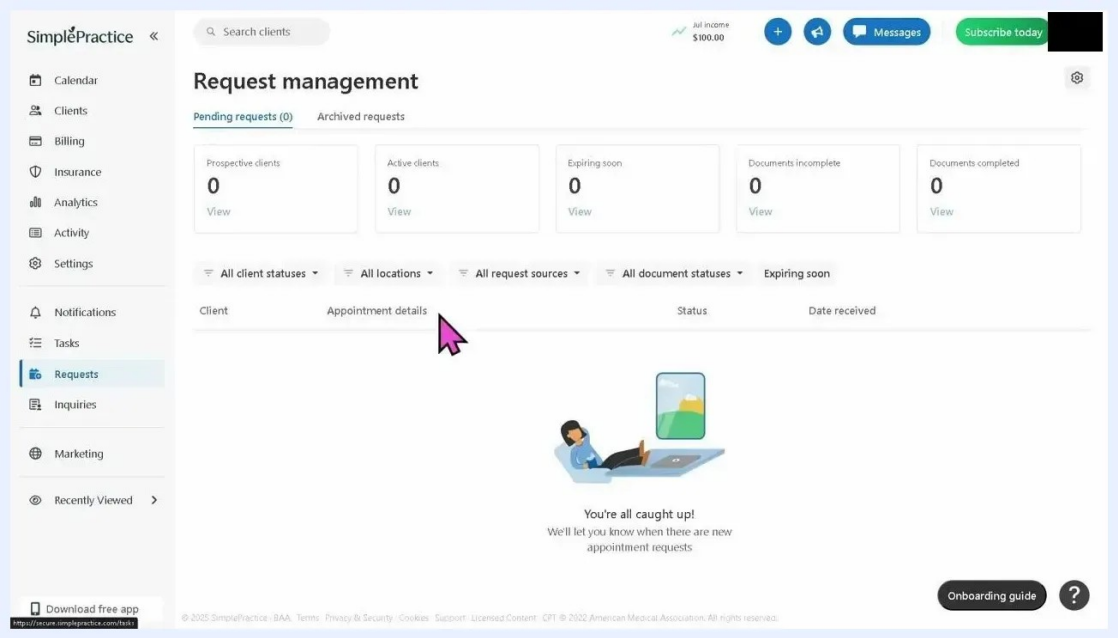
You can create tasks separately from appointments.

1. Click **Tasks** in the left navigation bar.
2. Click **Add task**.
3. In the **Create task** dialog, enter the details:

    - **Task name:** for example, "How to Use SimplePractice Telehealth".
    - **Description:** for example, "How to Use SimplePractice Telehealth".
    - **Due on:** select July 30, 2025 from the calendar.
    - **Priority:** set to High.
    - **Client:** start typing and select "Karen Appleseed" from the dropdown.

- **Attachments:** optionally choose or drag and drop a file (maximum 20 attachments, 50MB each).

4. Click **Save**.

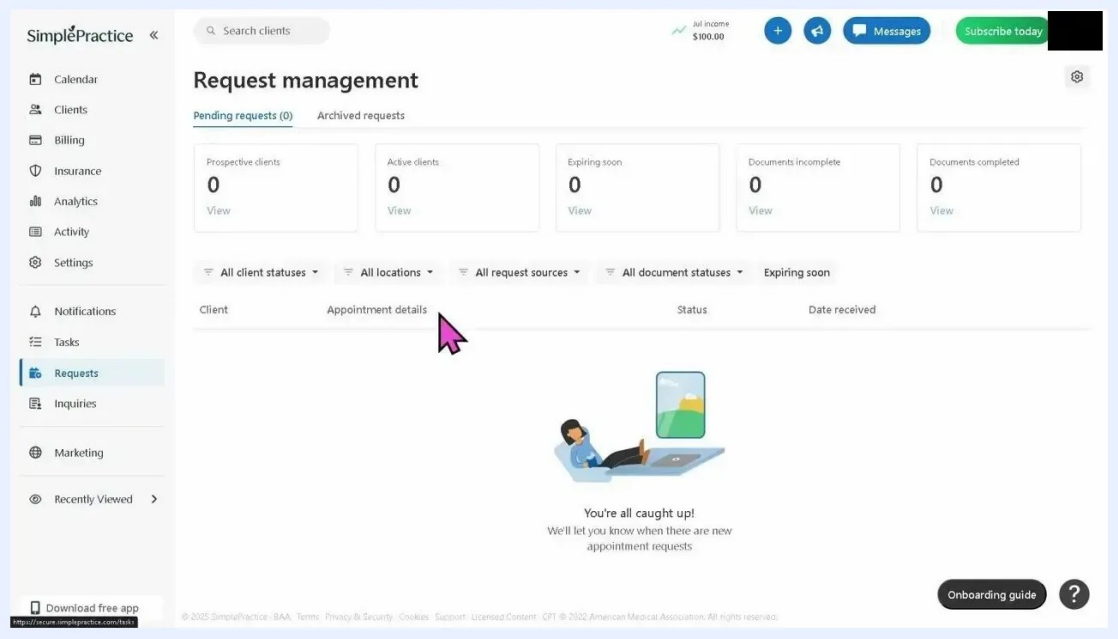



**Create task dialog with fields for task name, description, due date, priority, client, and attachments**

## 23. Review appointment requests

Click **Requests** in the left navigation bar. The **Request management** screen shows tabs for Pending and Archived requests. You can view counts for prospective clients, active clients, expiring soon, documents incomplete, and documents completed.

Use the filters for client status, location, request source, document status, and expiring soon. If there are no pending requests, the screen says "You're all caught up!"



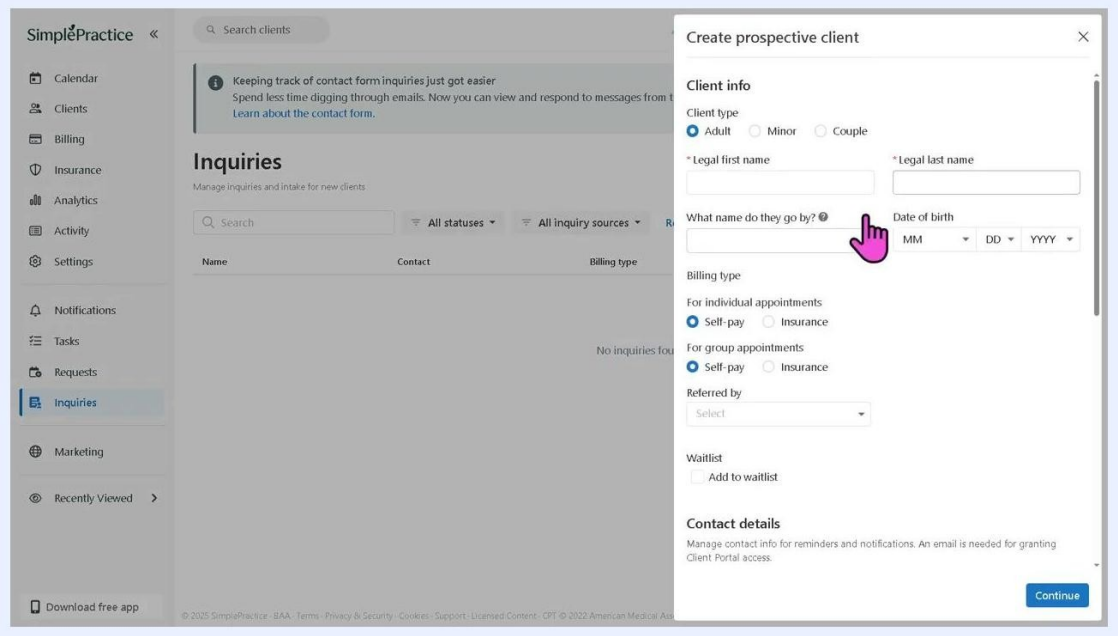

**Request management screen showing no pending requests and filter options**

## 24. Add a prospective client

Click **Inquiries** in the left navigation bar, then click the button to create a new prospective client. In the **Create prospective client** dialog, enter the following:

- **Client type:** select Adult, Minor, or Couple.
- **Legal first name and last name.**
- **What name do they go by?** This field is optional.
- **Date of birth.**
- **Billing type** for individual and group appointments: choose Self-pay or Insurance.
- **Referral and waitlist:** optionally select who referred the client and add them to the waitlist.
- **Contact details** for reminders and notifications. An email is required for portal access.

Click **Continue** to proceed.




**Create prospective client dialog with fields for client type, legal name, date of birth, billing type, referral, waitlist, and contact details**

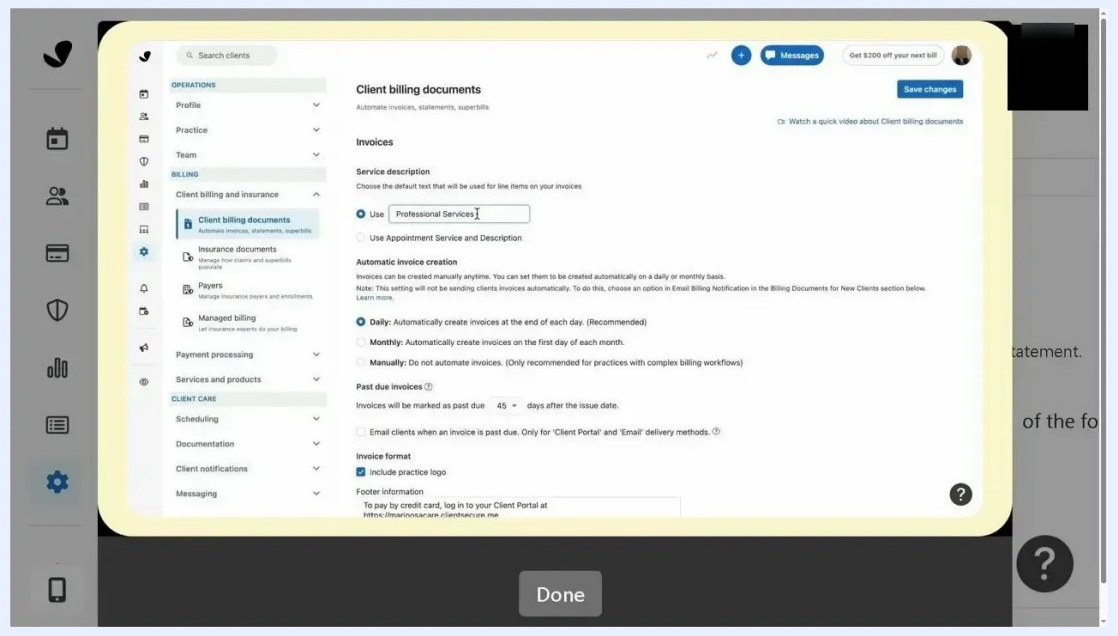
# Review client billing document settings

## 25. Configure client billing documents

Review the **Client billing documents** section to automate invoices, statements, and superbills. On this screen you can:

- Set the default service description for invoices, for example "Professional Services".
- Choose between a general service description and appointment-specific descriptions.
- Set automatic invoice creation to Daily (creates invoices at the end of each day, recommended), Monthly (creates invoices on the first day of each month), or Manually (no automation, for complex workflows).
- Set the number of days after which invoices are marked as past due, for example 45 days.
- Optionally enable email notifications for clients when invoices are past due.
- Include your practice logo on invoices.

- Add footer information for payment instructions.




**Client billing documents settings with options for service description, automatic invoice creation, past due settings, invoice format, and footer information**

## Summary

You now know how to use telehealth in SimplePractice. You signed up for a free trial, explored the calendar, scheduled a Video Office appointment, started a session, and adjusted host controls. You also created a task, reviewed appointment requests, added a prospective client, and looked at the client billing document settings.