CLIENT PORTAL INFORMATION

All records are stored in an electronic medical record system (EMR) due to HIPAA (Health Insurance Portability and Accountability Act) regulations. HIPAA addresses the use and disclosure of an individuals' health information by organizations subject to these regulations, as well as standards for individuals' privacy rights to understand and control how their health information is used.

In order to protect your privacy and adhere to these regulations, all electronic communication must be protected. As an example, emails may only be sent via an encrypted portal. This document will summarize the steps and walk you through the process of establishing your own personal client portal.

REGISTERING & SETTING UP YOUR SECURE CLIENT PORTAL

1. Once you have been accepted as a client, you will receive an automated email from me with the subject line: **Login for Saundra Jain, MA, PsyD, LPC.** Using the information in the email, click on the secure portal login link and enter your temporary username (which will be your email address) and the temporary password. Once logged in, you will be prompted to:

   - Change your temporary password to one easier for you to remember.
   - Change your temporary username to another permanent one.
   - Set 2 challenge questions & answers. Please remember these in case you ever forget or need to reset your password.

2. Once this is done, follow the steps outlined below in order to have your client portal fully set up and ready to go:

   - Read and agree to the **Policies and Procedures.** You only have to do this once unless the policies are revised. Please type in your *full name*, which serves as your electronic signature and check the box to agree.
   - Complete the **Client Registration Form***.*
   - You should now be in your secure portal. If you have an appointment(s) already scheduled, you will see them on the home page.
   - Click the **My Info** icon and make sure your information is correct. You may edit or update this information as needed.

HOW TO USE YOUR NEW CLIENT PORTAL

I've outlined information below about sending secured email, texting, online payments/billing, receipts for insurance, and the **CLIENT PROGRESS NOTES** form:

- **SECURED EMAIL:**
  Click the **Mail** icon. Once you see the page titled **Inbox**, click SEND, and the new message window will open. Complete the Subject and the Message and then click Send Message. ***PLEASE DO NOT USE THIS SYSTEM IF YOU'RE IN CRISIS. FOR CRISIS SITUATIONS, ALWAYS CALL ME.***

- **TEXTING:**
  This form of communication is not considered protected. To meet these regulations, I will not text or respond to texts. However, this system's auto-remind feature will send you a secure email plus a text to remind you of an upcoming appointment or phone call 3 days prior to your session/call.

- **ONLINE PAYMENTS/BILLING:**
  Click the **Billing** icon to see if you have a payment(s) due or to make a payment. This system uses PayPal for online payments. The system's auto-remind feature will send you an email plus a text to remind you to make payment 1 day prior to your session/call.

- **RECEIPTS FOR INSURANCE:**
  Any time after your session, if you need documentation to file a claim with your insurance for out-of-network benefits, click the **Billing** icon. This will open a screen named **Current Invoices** and provide a list of all invoice activity since your name was entered into the new system. Find the appointment time for which you need a receipt and click on the invoice for that appointment. Once the new window opens, click the small **Print** button, located in the bottom left corner and print your receipt. Please remember that claims for phone calls are typically not covered by insurance.

- **CLIENT PROGRESS NOTES:**
  Click the **Forms** icon and please do this ***before*** each session. Go to **Available Forms** and find **CLIENT PROGRESS NOTES**. On the far right, under **Actions**, click ***fill out to complete the form***. There is no need to print the form, as it will be saved electronically becoming part of your EMR. The system will alert me once you've completed the form so I can review it before your session/call. If you forget to complete the form prior to your appointment, I will provide an iPad for you to complete the form during the first few minutes of your session.

PLEASE REMEMBER, THIS IS TIME SENSITIVE SO PLEASE SET UP YOUR PRIVATE CLIENT PORTAL RIGHT AWAY. IT'S IMPORTANT THAT YOUR PORTAL IS UP AND RUNNING SO I CAN SET UP YOUR FIRST APPOINTMENT.