Request and Manage Appointments as a TherapyPortal User

While some practices do not allow online scheduling, many TherapyNotes practices use TherapyPortal to allow their clients to conveniently request and manage appointments.

If your practice uses TherapyPortal, they will inform you how to access the portal. In many cases, they will send you an email invitation to join the portal, or they may include a link to the portal on the practice's website.

If you are unsure how to access the portal, please talk to the staff at your practice.
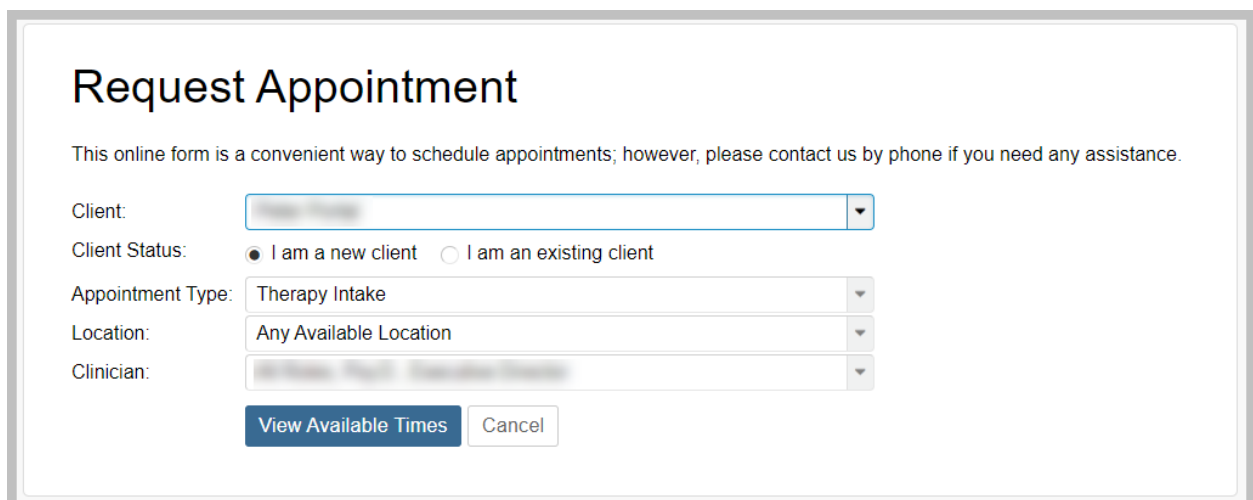
Each practice uses TherapyPortal differently, so be aware that your practice may choose not to take advantage of all portal features.

Request Appointments

Many practices require clients to be logged in to the portal in order to request appointments.

Request an appointment on TherapyPortal with an existing portal account:

- Log in to your practice's portal.
- Click the **Request Appointment** button.

- For **Client Status**, select whether you are a new client or an existing client. If you are an existing client with at least one previous appointment, the Client Status field will auto-populate with "I have had a previous appointment at this practice".

- From the **Appointment Type** dropdown, select whether you are scheduling a Therapy appointment or a Medication Management appointment, if applicable. New clients may only schedule Therapy and Medication Management *Intakes*, while existing clients may only schedule Therapy and Medication Management *Sessions*.

- If your practice has multiple locations, select your preferred location from the **Location** dropdown.

- From the **Clinician** dropdown, select your preferred clinician or search for **Any Available Clinician.**

- Click the **View Available Times** button.

- Select your preferred appointment time.

- Review your appointment request details and click the Submit Request button

Tip: If you select an appointment time that is in the near future, you may be unable to schedule the appointment through TherapyPortal. Please contact your practice to schedule such appointments.

You will receive an email confirmation once your appointment request is approve by the practice. If your request is declined, you will be contacted by the practice directly to reschedule. Declined appointment requests will not appear in your appointment list.

Request an appointment on TherapyPortal without a portal account:

Some practices allow clients to request appointments without creating a portal account or logging in. If this is the case with your practice, you may follow these instructions to request an appointment without logging in.

- Visit your practice's portal.

- Click the **Request Appointment** button.

- Follow the steps above for configuring the details of your appointment.

- Click the **Continue Without Signing In** button.

- Enter your **Name**, **Date of Birth**, **Email**, and **Mobile Phone.** If desired, include a message to the practice.

- Click the **Submit Request** button.

You will receive an email confirmation once your appointment request is approve by the practice. If your request is declined, you will be contacted by the practice directly to reschedule. Be sure to request a portal account at your appointment so that you can manage your upcoming appointments.

View Appointments

With a portal account, you may view and manage any of your existing appointments or pending requests with the practice.

View your upcoming appointments, canceled appointments, and pending requests:

- Log in to your practice's portal.

- Your next confirmed appointment is shown on the homepage. To view your full list of appointments, click the **Manage Appointments** button or click the **Appointments** tab at the top of the page. Confirmed, pending, and cancelled appointments will display slightly differently in the list.

(A) Pending appointment request: Pending new appointment requests appear with a blue and white striped bar and "New Appointment Pending" tag. These appointments have not yet been confirmed by your practice.

(B) Confirmed appointment: Your confirmed upcoming appointments appear on you appointment list with a solid blue bar.
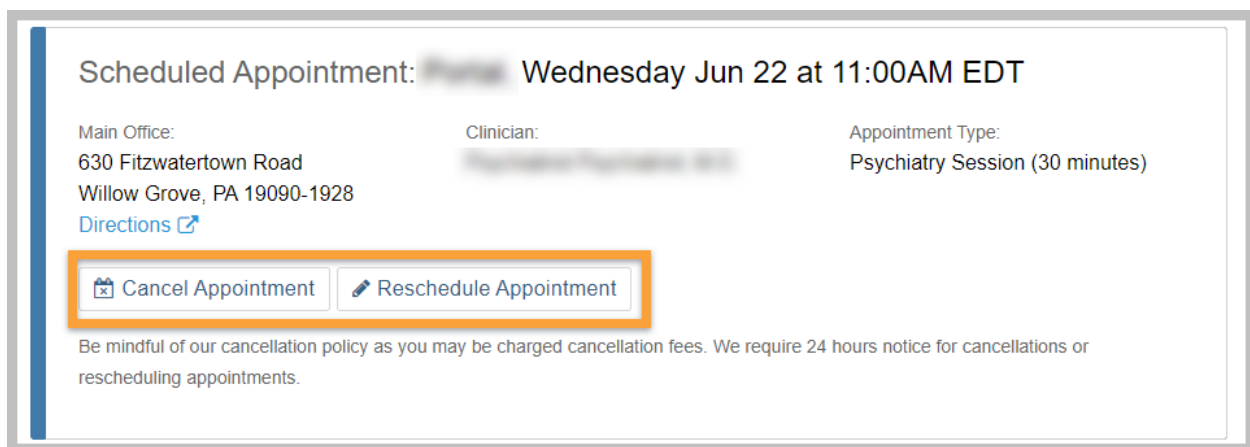
(C) Pending cancellation or reschedule request: Appointments that you have requested to be rescheduled or canceled through the portal appear with blue and white striped bar and a "Rescheduling/Cancellation Pending" tag. These appointments were previously confirmed by your practice, but your practice has not yet reviewed your request to cancel or reschedule.

(D) Canceled appointment: Upcoming appointments that have been canceled appear with a white bar and a strike through the appointment details.

Cancel or Reschedule Appointments

View your upcoming appointments, canceled appointments, and pending requests:

- Log in to your practice's portal.
- Click the **Manage Appointments** button or click the **Appointments** tab at the top of the page.
- Click the appointment you want to cancel.
- To cancel a confirmed appointment, click the **Cancel Appointment** button.
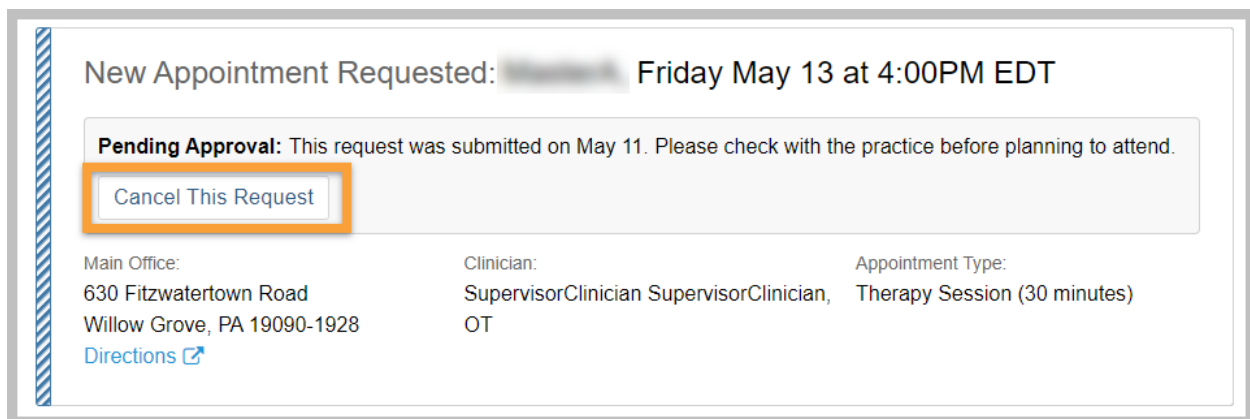
- To cancel a pending request, click the **Cancel This Request** button.

Reschedule a confirmed appointment:

- Log in to your practice's portal

- Click the **Manage Appointments** button or click the **Appointments** tab at the top of the page.

- Click the appointment you want to reschedule.

- Click the **Reschedule Appointment** button.

Request Appointment

This online form is a convenient way to schedule appointments; however, please contact us by phone if you need any assistance.

Client:	[blurred] ▾
Client Status:	I have had a previous appointment at this practice.
Appointment Type:	Medication Management Session ▾
Location:	Main Office ▾
Clinician:	[blurred]

View Available Times Cancel

- Edit the appointment details including **Appointment Type**, **Location**, and **Clinician** as desired.

- Click the **View Available Times** button.

- Select your preferred appointment time.

- Review your reschedule request details and click the **Submit Request** button.