

How to Use Secure Messaging as a TherapyPortal User

Practices who use TherapyNotes may choose use Secure Messaging to communicate with their clients.

In order to receive messages from your practice, you must have an account with your practice's client portal. 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.

Sending a New Message

- Log in to your practice's portal.
- New messages are shown on your homepage. To view all of your messages, click **Messages** at the top.
- On the Messages page, you can click the **+ New** to create a new message to send to a Practice Admin, Biller, or your Clinician

New Message

Client
John Doe

Audience

- Administrative: Scheduling requests
- Billing: Invoices, payments, or insurance
- Clinical: Non-urgent clinical conversation

Topic

Subject

Message Body

Paragraph | **B** | *I* | U |

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Start a new message

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Send Message Cancel

- Select the audience.
- Select a topic and the subject will populate automatically. You can edit the subject as well.
- Type your message and click **Send Message**.

Responding to a New Message

You will see a message on your home screen and an indicator on the navigation menu when you have new messages. You will also automatically receive an email when you receive a new message.

1. To respond to a new message, you can navigate to the inbox by clicking the message from the home screen or clicking **Messages** in the navigation menu.
2. In the inbox, click on the thread on the left to view the message. New messages will have a dot indicator.

3. Once you begin typing, the **Send Message** button will enable. You can send your message when you're ready!

The screenshot displays the TherapyNotes messaging interface. At the top, there are navigation links for Home, Documents, and Messages. The main heading is "Messages for John" with a "+ New" button. A disclaimer states: "This inbox is monitored during business hours and is not intended for emergency use. If you are experiencing an emergency, please dial 988 or 911." Below this, there are filters for "John Doe (0)", "All Audiences", and "Read and Unread". The message list shows two entries: one from John Doe (Clinical 11:14 AM) and one from John Doe (Admin 11:14 AM). The selected message is a "Non-urgent clinical message" from John Doe, Client, dated 1/29/24 at 11:13 AM. The message content is: "hey!". Below this, there is a response from John Doe, Client, dated 1/29/24 at 11:14 AM, which reads: "I appreciate our session yesterday and am looking forward to next week. I cannot remember the book you told me to read- would you mind sending me that?". At the bottom, there is a rich text editor with a toolbar and a text input field.

Multiple Portal User Accounts

If you have multiple portal users per account, messages on the homepage will be separated the same way documents and billing are. In the inbox, you can filter by client to see messages for each of the portal users on your account.

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