Review or Sign a Document as a TherapyPortal User

Practices who use TherapyNotes may choose to send documents, videos, audio, and more to you through TherapyPortal, allowing you to review and sign documents online without needing to spend time filling out forms in the office.

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

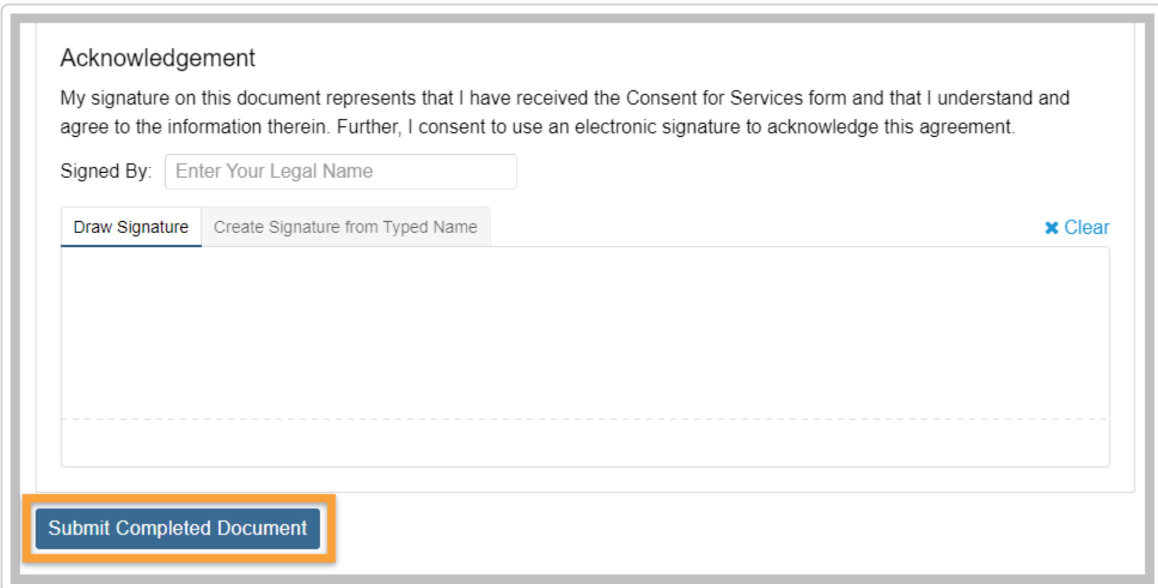
Locate Documents Your Practice Has Sent to You

- Log in to your practice's portal.
- Pending documents are shown on your homepage. To view all of your pending documents, see **Paperwork and Forms** at the top.

- Documents that are pending your signature or review are shown under **Requested**. Any document that you have previously reviewed or signed for the practice are shown in the **Client Records** tab at the top. To view a document that you've already completed, click on the name of the document.

Review a Document

- From your **Documents** page, click on the review/complete button next to the name of the document.
- Read the instructions for the request provided by the practice.
- If the document can be displayed in your web browser, review the document directly on the portal. Otherwise, click the link to the document to open and review it.
- After reviewing the document, add your signature, if required, then click the **Submit Completed Document** button.



Sign a Document

- From your **Documents** page, click on the **Review and Sign** button next to the name of the document.
- Read the instructions for the request provided by the practice.
- If the document can be displayed in your web browser, review the document directly on the portal. Otherwise, click the link to the document to open and review it.
- After you've reviewed the document, click the **Sign Document** button.

1) In the **Signed By** field, type your legal name. If you're signing on a mobile device, tap **Next** and rotate your phone to landscape mode.

2) Draw your signature in the area provided, OR select the **Create Signature from Typed Name** tab to generate a signature from the name you entered in the **Signed By** field.

- If you make a mistake when drawing your signature, click the **Clear** link above the drawing area.

3) When you're satisfied with your signature, click the **Apply Signature** button.

Your signature will be recorded in your portal account. You can reference signed documents and their accompanying signatures by clicking on the name of the document in the **Completed Documents** table on your **Documents** page.

Still need help? Contact Us (https://www.therapynotes.com/contact/)