

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.

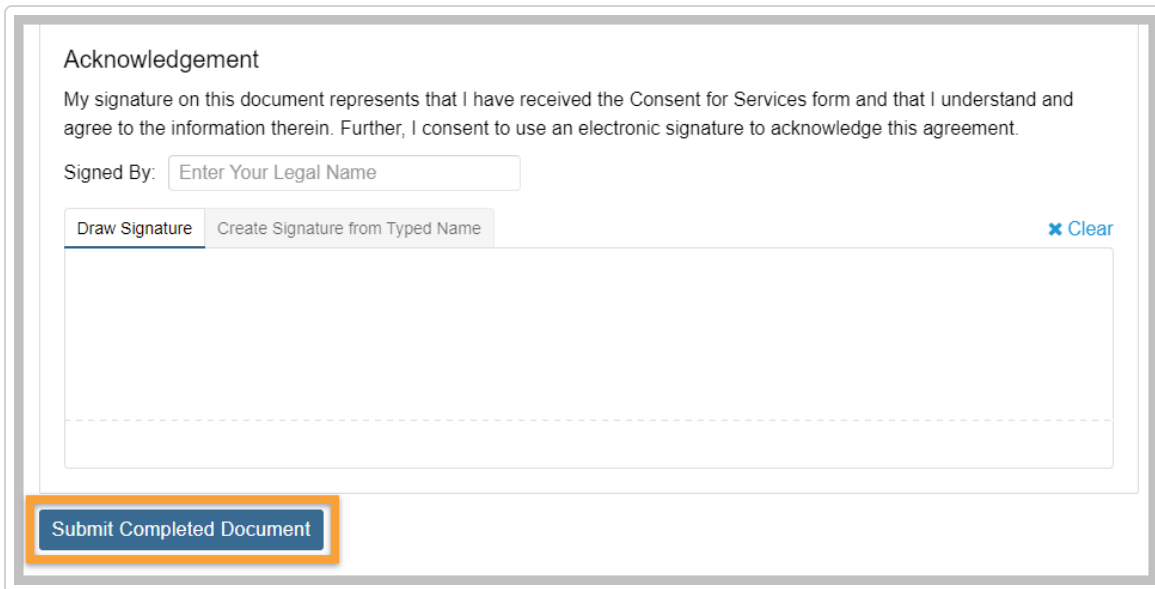


The screenshot shows the 'Documents' page in TherapyPortal. At the top, there are two tabs: 'Paperwork & Forms' (which is active and has a '4' next to it) and 'Client Records'. Below the tabs, the section is titled 'Requested' with the instruction 'Please complete these items.' There is a list of four documents, each with an icon, a title, and a date: 'NPP for 2023' (Sent on Feb 1, 2023), 'Tx Plan' (Sent on Jan 31, 2023), 'Client History Form' (Sent on Jan 31, 2023), and 'GAD-7' (Sent on Jan 17, 2023). To the right of each document is a blue button with a right-pointing chevron. These buttons are: 'Upload and Sign', 'Sign', 'Complete Form', and 'Answer Questions'. A yellow rectangular box highlights the right side of the screenshot, encompassing all four action buttons.

- 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.



Acknowledgement

My signature on this document represents that I have received the Consent for Services form and that I understand and agree to the information therein. Further, I consent to use an electronic signature to acknowledge this agreement.

Signed By:

[✕ Clear](#)

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.

Sign: Psychotherapy Treatment Plan

I acknowledge that I have participated in the development of the treatment plan and agree with the goals, objectives, and interventions.

1 Signed By:

2 Draw Signature

Jane Smith

3

- 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/>)*

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