

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

The image shows a 'New Message' dialog box. At the top is a title bar with the text 'New Message' and a close button (X). Below the title bar are several sections: 'Client' with a dropdown menu showing 'John Doe'; 'Audience' with three radio button options: 'Administrative: Scheduling requests' (selected), 'Billing: Invoices, payments, or insurance', and 'Clinical: Non-urgent clinical conversation'; 'Topic' with an empty dropdown menu; 'Subject' with an empty text input field; and 'Message Body' with a rich text editor. The rich text editor has a toolbar with options for Paragraph, Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Decrease Indent, Increase Indent, Undo, and Redo. The text area contains the placeholder 'Start a new message' and a character count '0/5,000' in the bottom right corner. At the bottom of the dialog are two buttons: 'Send Message' and 'Cancel'.

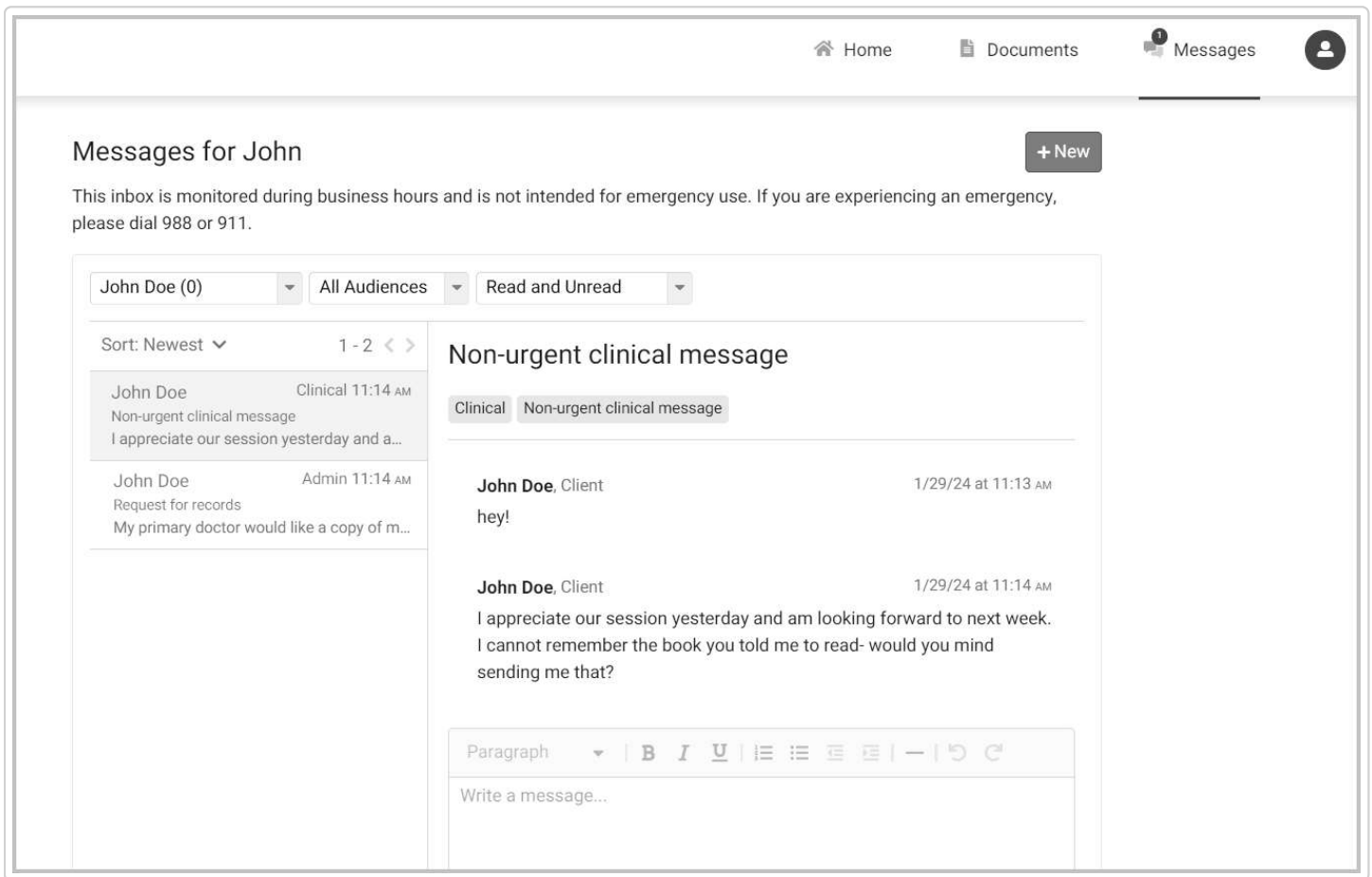
- Select the audience.
- Select a topic and the subject will populate automatically. You can edit the subject as well.
- Type your message and click **Send Message**.

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!



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.

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