

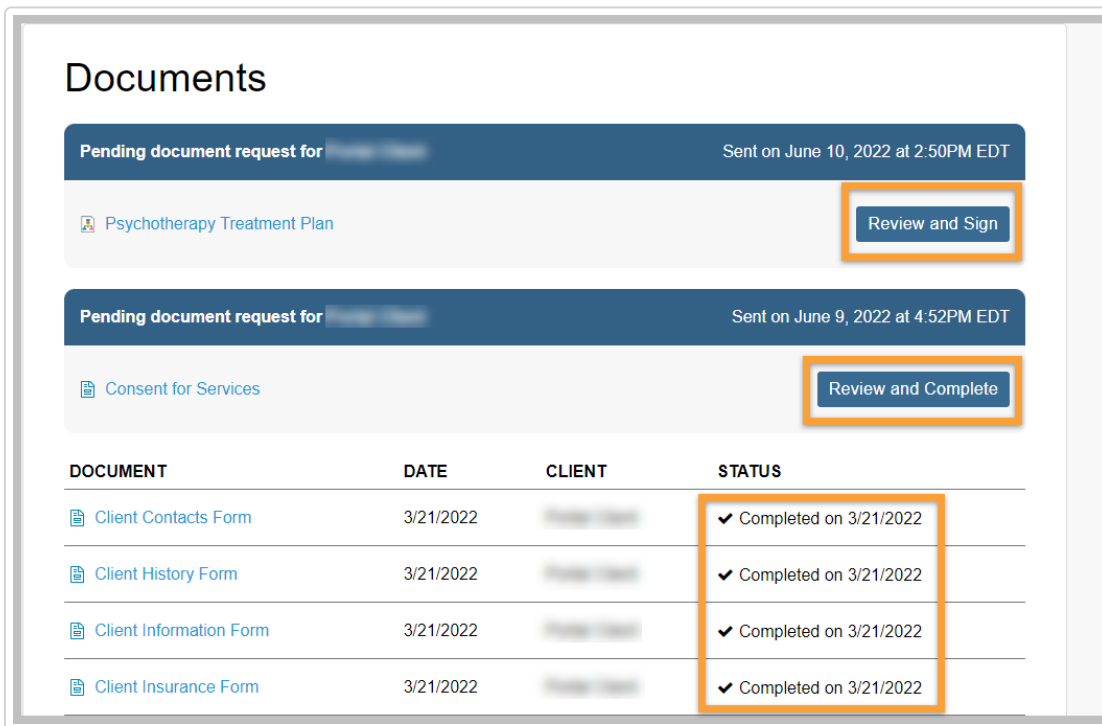
# Review or Sign a Document as a TherapyPortal User

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 and completed documents, click the **View Documents** link or click **Documents** at the top of the page.



The screenshot displays the 'Documents' section of a user interface. It features two 'Pending document request' cards. The first card is for a 'Psychotherapy Treatment Plan' sent on June 10, 2022, with a 'Review and Sign' button. The second card is for 'Consent for Services' sent on June 9, 2022, with a 'Review and Complete' button. Below these cards is a table with columns for DOCUMENT, DATE, CLIENT, and STATUS. The table lists four completed documents: Client Contacts Form, Client History Form, Client Information Form, and Client Insurance Form, all dated 3/21/2022. The 'STATUS' column for each row shows a checkmark and the text 'Completed on 3/21/2022'.

DOCUMENT	DATE	CLIENT	STATUS
Client Contacts Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022
Client History Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022
Client Information Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022
Client Insurance Form	3/21/2022	[REDACTED]	✓ Completed on 3/21/2022

- Documents that are pending your signature or review are shown under **Pending Document Requests**. Any document that you have previously reviewed or signed for the practice are shown in the table below pending documents and list a status of "Completed on (date)". 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 and 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  Create Signature from Typed Name

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/>)*