Instructions for TheraNest Client Portal

The following are instructions on how to use the Client Portal on TheraNest, MICA's Electronic Medical Records. The Client Portal allows clients to view and electronically sign consent forms, input and make changes to their home and billing addresses and demographic information, and even view past and upcoming appointments. There is also a secure messaging feature that allows clients and therapists to email and send attachments to each other.

1) Therapist invites Client to Client Portal. Client will receive an email inviting them to create a login and password for their Client Portal. Please note that an email address can only be used once, so a different email address will be required for each individual Client.

2) Client creates Client Portal. Please save your password! Your therapist will not have access to your password or be able to reset it.

3) Client updates Portal profile.
   - a) Click: Client Name (upper right hand corner)
     - i) Click: Profile
       - (1) Update Name, Preferred Name, Email, and Phone
     - ii) Click: Demographic Info
       - (1) Contact Information:
         - (a) Input/update Phone and Address information
       - (2) Emergency Contact
         - (a) Input/update Name, Phone, and Relationship of Emergency Contact
       - (3) Demographic
         - (a) Input/update Birth Date and Gender (must match insurance information)
         - (b) All other Demographic fields are optional/voluntary
   - b) Click: $ Billing (top left)
     - i) Input/update Name, Phone, Email, and Address for the Credit Card on file. Note: this may be different than Client's information.

4) Client completes Forms
   - a) Click: Forms (top left)
     - i) Click: Complete Forms
       - (1) Make sure all required fields are completed.