



SHARING IS HEALING ELECTRONIC RECORD SYSTEM GUIDE

Tips to help you through the process!

Updated: April 2021

Questions? Email: sharingishealingames@gmail.com

Michelle Roling LMHC, CEDS-S

Welcome- when you are added to the Sharing is Healing electronic record system, you will receive the following email:

[TherapyAppointment] Registration created on 03/20/2021 12:15 PM (CDT) » Inbox x



TherapyAppointment <no-reply@therapyappointment.com>

to me ▾


Hi,


An account has been established for you at TherapyAppointment.

Please [visit our site](#) to log in and set up your profile.

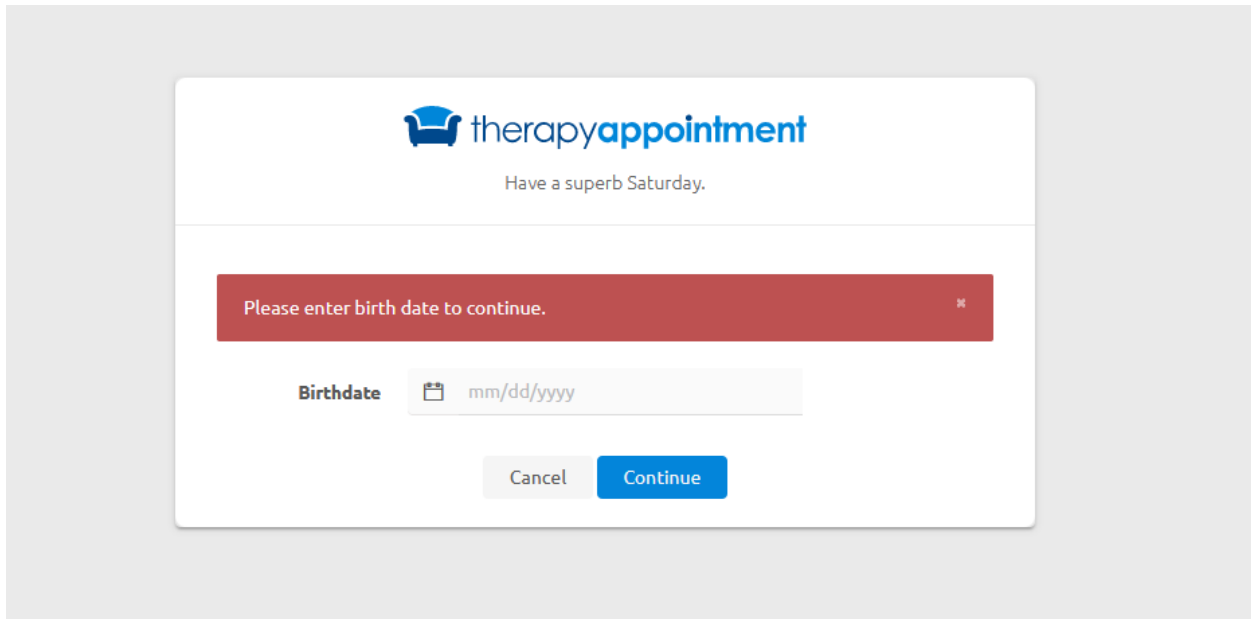
Regards,

The TherapyAppointment Team

 Reply

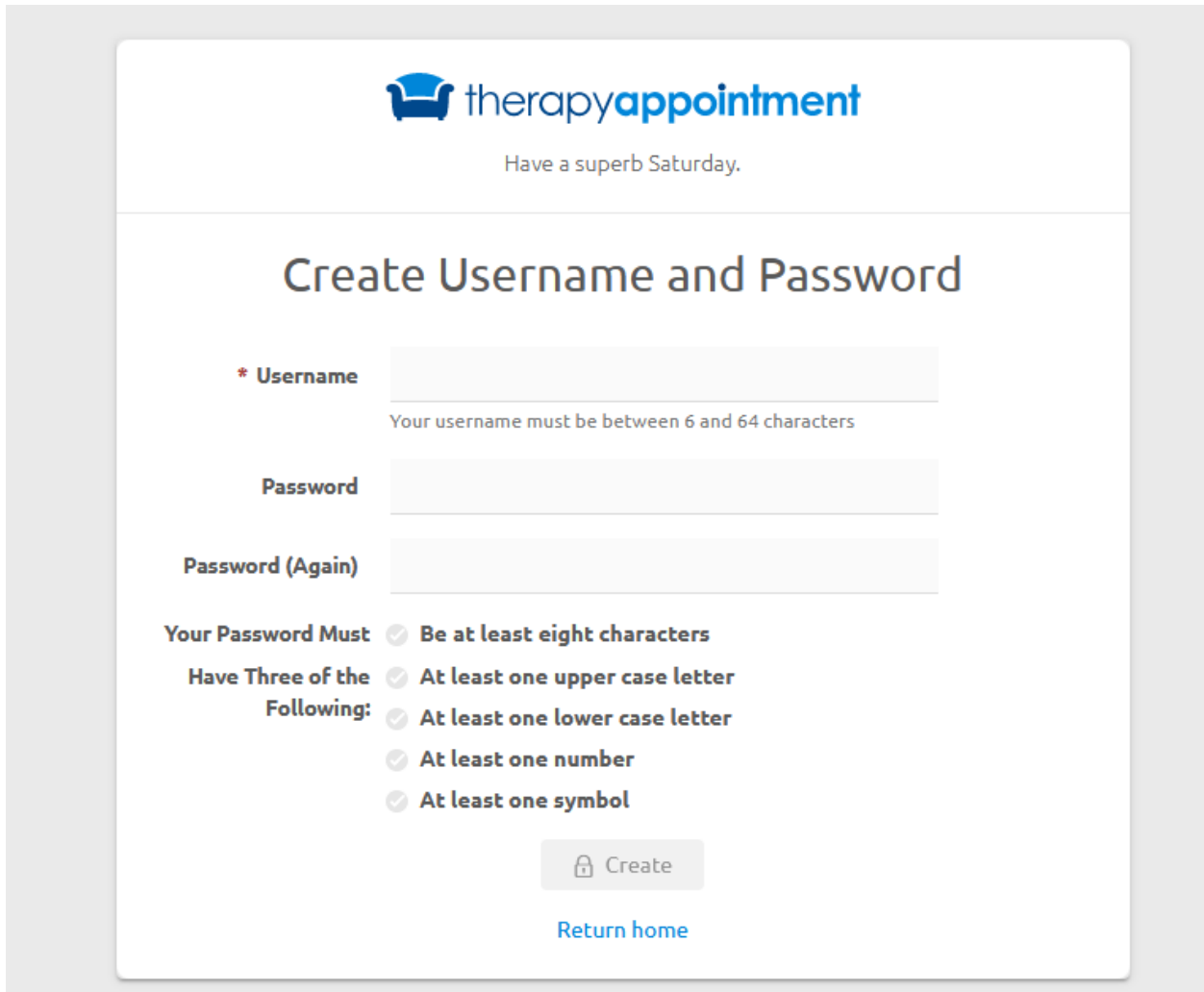
 Forward

Once you click onto “visit our site” you will see:



The screenshot shows the TherapyAppointment website interface. At the top, there is a blue logo of a chair and the text "therapyappointment". Below the logo, it says "Have a superb Saturday." A red error message box states "Please enter birth date to continue." Below this, there is a "Birthdate" label and a text input field with a calendar icon and the placeholder "mm/dd/yyyy". At the bottom of the form, there are two buttons: "Cancel" and "Continue".

After you enter your date of birth:



The screenshot shows a web form for creating a username and password. At the top, there is a logo for 'therapyappointment' featuring a blue chair icon. Below the logo is the text 'Have a superb Saturday.' The main heading is 'Create Username and Password'. The form includes three input fields: 'Username', 'Password', and 'Password (Again)'. Below the 'Username' field, there is a note: 'Your username must be between 6 and 64 characters'. Under the 'Password' fields, there are four password requirements, each with a checked checkbox: 'Be at least eight characters', 'At least one upper case letter', 'At least one lower case letter', 'At least one number', and 'At least one symbol'. At the bottom of the form, there is a 'Create' button with a lock icon and a 'Return home' link.

therapyappointment
Have a superb Saturday.

Create Username and Password

*** Username**
Your username must be between 6 and 64 characters

Password

Password (Again)

Your Password Must

- Be at least eight characters

Have Three of the Following:

- At least one upper case letter
- At least one lower case letter
- At least one number
- At least one symbol

[Return home](#)



TERMS OF SERVICE

Please take a moment to review and accept our Terms of Service.

Terms of Service (Clients)

Last Updated: 01/08/2020

These Terms of Service together with the Privacy Policy of Psych Select Software, LLC (collectively the Terms of Service and Privacy Policy are hereinafter "the Terms") form an agreement between Psych Select Software, LLC d/b/a Therapy Appointment (hereinafter "Psych Select") and you (hereinafter "User") and govern your use and access to the therapyappointment.com client portal system (hereinafter "the Service"). By clicking the "AGREE" button, User consents to be bound by the Terms. If User does not agree to the Terms, User may not use the Service.

1. SERVICE NOT FOR USE FOR EMERGENCY MEDICAL NEEDS. The Service is not intended or permitted to be used for emergency situations. Messages transmitted through the Service may not be immediately available to or from User to User's mental health provider and may not be viewed by the User's mental health provider within a predictable amount of time. IF USER OR USER'S DEPENDENT (AS DEFINED BELOW) EXPERIENCES A MEDICAL

By using this software, I agree to the terms and conditions set forth in this agreement.

Once you have agreed to the terms of services it will take you to your "client portal"

CLIENT PORTAL

This is your page for nearly everything you will do!

Items to have on hand for setting up your information:

-insurance card

-HSA card if you have one- this will be used first for co pays/deductibles. No show fees/ late cancel fees can NOT be charged to an HSA account.

- credit card you will have on file for co pays/fees (even if you have an HSA on file we need a credit card on file)

BE SURE TO LOOK AT NEW CLIENT DOCUMENTS 😊 and complete any assigned to you!

The screenshot shows a web browser window with the URL <https://portal.therapyappointment.com/index.cfm>. The page title is "Dashboard : Welcome to TherapyAppointment". The user is identified as "Michelle test" with the name "Michelle Roling M.Ed., LMHC, CEDS-S".

TELEHEALTH SESSIONS

The following telehealth sessions are ready for you to join.

03/20/2021 – 12:15P [Launch] [Make Payment] [View Account]

\$ 0.00
Your Responsibility

ACCOUNT SET UP

Important!

COMPLETE YOUR BIOGRAPHY →
Your therapist has asked that you complete a biography as part of intake.

ENABLE TWO-FACTOR AUTH →
Two-Factor Authentication adds a second layer of protection to your account.

PROVIDE INSURANCE INFORMATION →
Please indicate whether you plan to use health insurance

APPOINTMENTS [View All Appointments] [Schedule New Appointment]

TODAY

12:15P Michelle M Roling CPT Unassigned

Account set up

Be sure to look at everything here and complete the information step by step!

ACCOUNT SET UP

Important!

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PROVIDE INSURANCE INFORMATION →
Please indicate whether you plan to use health insurance

VIEW CLIENT DOCUMENTS →
Sign or view documents that were assigned by your therapist

Biographical Information

Please complete the following form, which will provide information useful in treatment.

Please note: It will take about 30 minutes to complete this form. Your changes will be saved as you fill out the form, in case you need to finish the form later.

Please complete the form before your next appointment.

If you are not **Michelletest test** (for example, if you are giving information about your child), please fill in the form about **Michelletest test** to the best of your knowledge.

✔ Auto-saved 3/20/2021 12:33 pm. Auto-saves are kept for sixty days.

▼ SYMPTOMS:

^ HAVE YOU SEEN A THERAPIST IN THE PAST:

^ YOUR FAMILY GROWING UP:

^ CHILDHOOD:

^ WHO LIVES WITH YOU NOW:

^ RELATIONSHIP HISTORY:

^ EDUCATION & OCCUPATION:

^ HOME LIFE:

^ HEALTH:

^ ACCOMPLISHMENTS/ADDITIONAL INFORMATION:

DID YOU complete each step:

Enter insurance information?

Complete biography?

Set up your reminders?

Complete any forms under New client Documents?


Enter your credit card information (& HSA if applicable)?

Appointment Reminders:

When you are setting up your information in the client portal- you will choose email or text reminders as well as how far in advance you'd like to get them. I recommend 48 hours in advance as cancelling with in 24 hours creates a late cancel charge!

What will my reminders look like when I get them:?

Sample Text reminder message:

 has an appt. with Michelle on Mar 30th at 2:00 PM US/Central time. Reply 'Yes' to confirm.

YOU MUST CONFIRM YOUR APPOINTMENT

otherwise when it is time for your appointment, you log into the portal for your session you will not see the launch information; however, will see:

NOT ATTENDING AS OF

REQUEST CANCELLATION

If you forget, no worries---- back up plan to to your email account you have listed through the system: AT THE TIME OF YOUR SESSION YOU WILL GET AN EMAIL with a launch session link--

[TherapyAppointment] Telehealth Session Starting

Hi,

Your virtual session is ready to begin at https://portal.therapyappointment.com/index.cfm/calendar:virtual/default/calendar_event_id/e80be6b0c9513a86c8a93bbd4d0a96f9.

Alternatively, you can log in to your client portal and click the blue "Launch Session" button on your homepage.

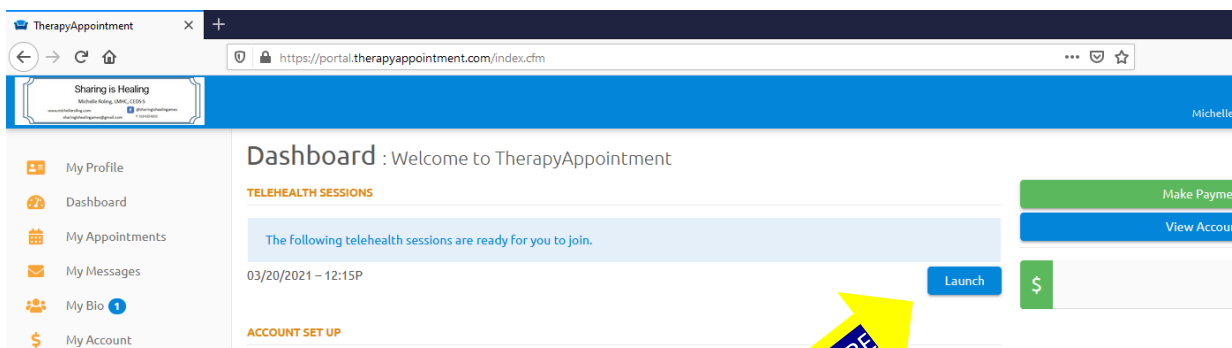
Regards,

The TherapyAppointment Team



Logging into a session through the portal: AKA- you confirmed your appointment

As you can see from the reminder- if you sign up for email reminders you can click on the link in your email. Otherwise- you have to log into Therapy appointment and log into your client portal. There will be a "launch session button".



PLEASE CHOOSE AN APPOINTMENT TYPE	
Individual Therapy BCBS (60 minutes)	<ul style="list-style-type: none"> if you have BCBS insurance pick this
Private pay individual-assisted (60 minutes)	<ul style="list-style-type: none"> cash pay and you have filled out financial assistance form for lower rate of \$75
Private pay individual (60 minutes)	<ul style="list-style-type: none"> cash pay of full rate
Individual Session Non BCBS (60 minutes)	<ul style="list-style-type: none"> using insurance NOT BCBS
Consultation Session (60 minutes)	<ul style="list-style-type: none"> appointments to consult

Scheduling appointments:

- log into your client portal

Dashboard : Welcome to TherapyAppointment

ACCOUNT SET UP

PROVIDE INSURANCE INFORMATION

Please indicate whether you plan to use health insurance

VIEW CLIENT DOCUMENTS

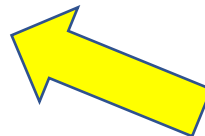
Sign or view documents that were assigned by your therapist

[Make Payment](#)
[View Account](#)
 \$ 0.00
 Your Responsibility

APPOINTMENTS

[Schedule New Appointment](#)

No appointments currently scheduled.



- select schedule new appointment.
- choose appointment type based on your payment agreement.

Selecting appointment date/time -please know the company is working on a more “user friendly” set up for this.

- The next screen you will see:

APPOINTMENT SUMMARY

Location: teletherapy
Therapist: Michelle M Roling
Appointment Type: Individual Therapy BCBS [Change Appointment Type](#)

WHICH DATE WOULD YOU LIKE TO SCHEDULE YOUR INDIVIDUAL THERAPY BCBS WITH MICHELLE M ROLING?

Starting on Date

- Choose the date you want to start looking from.
Currently know you are going to see a LOT of no appointments available today
As it shows all 7 days of the week and since I only work on 2 days of the week that’s a bit overwhelming 😞

WED MAY, 26, 2021

No appointments available today.

THU MAY, 27, 2021

No appointments available today.

When you select the date to start scheduling which aligns with the calendar I’m encouraging clients to book you will see options and you simply choose your time:

WHICH DATE WOULD YOU LIKE TO SCHEDULE YOUR INDIVIDUAL THERAPY BCBS WITH MICHELLE M ROLING?

Starting on Date

MON MAY, 17, 2021

6:45 AM

8:00 AM

9:15 AM

2:00 PM

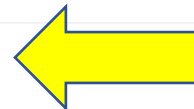
3:15 PM

TUE MAY, 18, 2021

6:45 AM

9:15 AM

12:45 PM



In this example I chose the Tuesday May 18, 2021 at 12:45 p.m.- and you will see this:

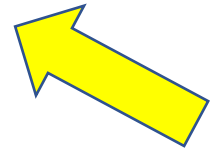
CONFIRM APPOINTMENT

Date and time: 05/18/2021 at 12:45 PM
With: Michelle M Roling
Location: teletherapy
Type: Individual Therapy BCBS (60 minutes)

Cancel

Schedule Appointment

Click on schedule appointment.



It will take you back to your dashboard and you will see the updated information.

Dashboard : Welcome to TherapyAppointment

Your appointment has been scheduled for 12:45 PM on 05/18/2021 with Michelle M Roling. ✕

ACCOUNT SET UP

Make Payment

View Account

PROVIDE INSURANCE INFORMATION

Please indicate whether you plan to use health insurance

\$

0.00

VIEW CLIENT DOCUMENTS

Sign or view documents that were assigned by your therapist

Your Responsibility

APPOINTMENTS

View All Appointments

Schedule New Appointment

FUTURE APPOINTMENTS

4W 1D 05/18/2021 – 12:45P Michelle M Roling Individual Therapy BCBS Confirm Cancel

To schedule additional appointments you will simply start the process again by clicking on schedule new appointment.