# SimplePractice Setup Checklist

*SimplePractice is used as the example; this is not an endorsement. Screens change, so the linked help articles are the source of truth.*

## 1. Start the free trial

- ☐ The trial runs 30 days, no credit card required, and opens on the Plus tier so every feature is visible before you decide on a paid plan.
  https://support.simplepractice.com/hc/en-us/articles/360020622052-Getting-started-with-SimplePractice

## 2. Review plans and pricing

- ☐ Compare tiers before you commit; add-ons like insurance claims, ePrescribe, and AI note-taking are billed separately from the base plan fee. Check the pricing page for current numbers rather than relying on a figure printed here.
  https://support.simplepractice.com/hc/en-us/articles/115005956266-Subscription-plan-and-pricing-FAQs

## 3. Enter your practice details

- ☐ Set your practice name, address, and logo under Settings, Practice, Practice details.
  https://support.simplepractice.com/hc/en-us/articles/24621381454093-Navigating-your-Operations-settings

## 4. Add your office location and Video Office

- ☐ Confirm the auto-created Video Office is the one assigned to telehealth appointments; clients only receive telehealth links and reminders when an appointment is booked to that specific location.
  https://support.simplepractice.com/hc/en-us/articles/207625576-Adding-office-locations

## 5. Set up telehealth

- ☐ Walk through the telehealth setup and consent flow in your browser before your first virtual session.
  https://support.simplepractice.com/hc/en-us/articles/360001196372-Getting-started-with-telehealth

## 6. Create your service codes

- ☐ Service codes determine how appointments are billed. Check the official page for the current CPT license fee before you unlock code selection.
  https://support.simplepractice.com/hc/en-us/articles/41995621553037-Creating-and-using-service-codes

## 7. Set your default rates

- ☐ Set a practice-wide default rate per service code so new appointments auto-populate a rate.
  https://support.simplepractice.com/hc/en-us/articles/21987496440845-Setting-default-rates-for-clinicians

## 8. Turn on online appointment requests

- ☐ Enable client portal permissions under Settings, Scheduling and inquiries, then review each request manually from the Requests queue.
  https://support.simplepractice.com/hc/en-us/articles/207624876-Enabling-online-appointment-requests

## 9. Set up your availability

- [ ] Define the days, times, locations, and services you offer, then review and save.
  https://support.simplepractice.com/hc/en-us/articles/42030644855309-Setting-up-availability-for-the-first-time

## 10. Set up the Client Portal

- [ ] The Client Portal is the client-facing hub for intake forms, document sharing, billing, and appointment requests.
  https://support.simplepractice.com/hc/en-us/articles/207925883-Setting-up-the-Client-Portal

## 11. Build or select intake and consent forms

- [ ] Start from a pre-built template or build your own, then set which ones auto-attach to a new client's intake packet.
  https://support.simplepractice.com/hc/en-us/articles/25559204667405-Managing-consent-forms-and-intake-documents

## 12. Choose your note templates

- [ ] Starter-plan accounts are limited to a Simple Progress Note or SOAP/DAP templates; customizing progress-note and other-document templates requires Essential or Plus. Check the official page to confirm your plan's current limits.
  https://support.simplepractice.com/hc/en-us/articles/25039088555149-Using-pre-built-templates-and-your-template-library

## 13. Turn on online payments

- [ ] Online payments run through an integrated processor. Check the official page for the current per-transaction rate before you rely on a number here.
  https://support.simplepractice.com/hc/en-us/articles/360019822032-Getting-started-with-online-payments

## 14. Turn on AutoPay, if you want it

- [ ] AutoPay charges a client's stored default card automatically after an invoice is created; it can be toggled practice-wide or per client, and requires an online payments account first.
  https://support.simplepractice.com/hc/en-us/articles/210215626-Getting-started-with-AutoPay

## 15. Set up insurance billing

- [ ] Enter your payers, then submit enrollments to file electronic claims and receive electronic Payment Reports. Enrollment is not the same as being credentialed with the payer, and can take several weeks to process.
  https://support.simplepractice.com/hc/en-us/articles/16829222028813-Getting-started-with-insurance-billing

## 16. Submit payer enrollments for claims and ERA

- [ ] Allow several weeks for enrollment to process. Check the official page for any current per-claim fee, since claim pricing on this platform is known to change.
  https://support.simplepractice.com/hc/en-us/articles/17388396500621-Submitting-enrollments-to-file-claims-and-receive-Payment-Reports

## 17. Set up your Therapy Finder profile

- [ ] Therapy Finder (formerly called Monarch) is a directory profile included on paid plans, separate from your own Professional Website. Enable it under Marketing, Directory, then edit and publish it under Marketing, Profile.
  https://support.simplepractice.com/hc/en-us/articles/37170656954765-Getting-started-with-Therapy-Finder

## 18. Connect calendar sync

- [ ] Basic one-way sync covers Apple Calendar, Google Calendar, and Microsoft 365 Outlook; two-way advanced sync is Google Calendar only. Check the official page to confirm which tier your plan includes.
  https://support.simplepractice.com/hc/en-us/articles/33641781380365-Getting-started-with-calendar-sync

## 19. Confirm your BAA is in place

- [ ] A Business Associate Agreement is agreed to as part of trial or account signup; review the Trust and Security page to confirm your account's current status.
  https://support.simplepractice.com/hc/en-us/articles/360018696052-SimplePractice-BAA-Terms-of-Service-and-Trust-Security-information