
How to Use Secure Messaging as a TherapyPortal User



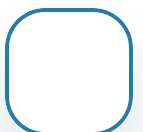
Practices who use TherapyNotes may choose use Secure Messaging to communicate with their clients.

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



New Message

Client

Troy (Troy) Bolton

Audience

☒ Administrative: Scheduling requests

☐ Billing: Invoices, payments, or insurance

☐ Clinical: Non-urgent clinical conversation

Topic

General scheduling questions and requests

Subject

General scheduling questions and requests

Message Body

Paragraph | **B** *I* U | |

Start a new message

0/5,000

Send Message

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 conversation 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!

The screenshot displays the 'Messages for Jan' interface. The top navigation bar includes 'Appointments', 'Documents', 'Billing', and 'Messages' (highlighted). The left sidebar shows a list of users: Bree, Admin, Billing, Clinical, Bob, and Jan (selected). The main content area shows a conversation with 'Jan Doe' and 'Annie AllRoles'. The conversation starts with a 'Follow-up question from recent appointment' from Jan Doe, followed by a response from Annie AllRoles. Jan Doe then asks to reschedule the follow-up appointment for Monday. Annie AllRoles responds that there is a slot open for Monday at 10am. Jan Doe concludes with 'Yes, thank you!'. The interface includes a 'Send Message' button and a text input field with a character count (0/5,000).

Multiple Portal User Accounts

If you have multiple portal users per account, messages on the homepage will be separated as documents and billing are. In the left-side panel of the Messages page, you can toggle between inboxes to see messages for each portal user on your account.

 Bree	
 Admin	
 Billing	
 Clinical	
 Bob	2
 Admin	1
 Billing	
 Clinical	1
 Jan	
 Admin	
 Billing	
 Clinical	

TherapyNotes® Secure Messaging

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