



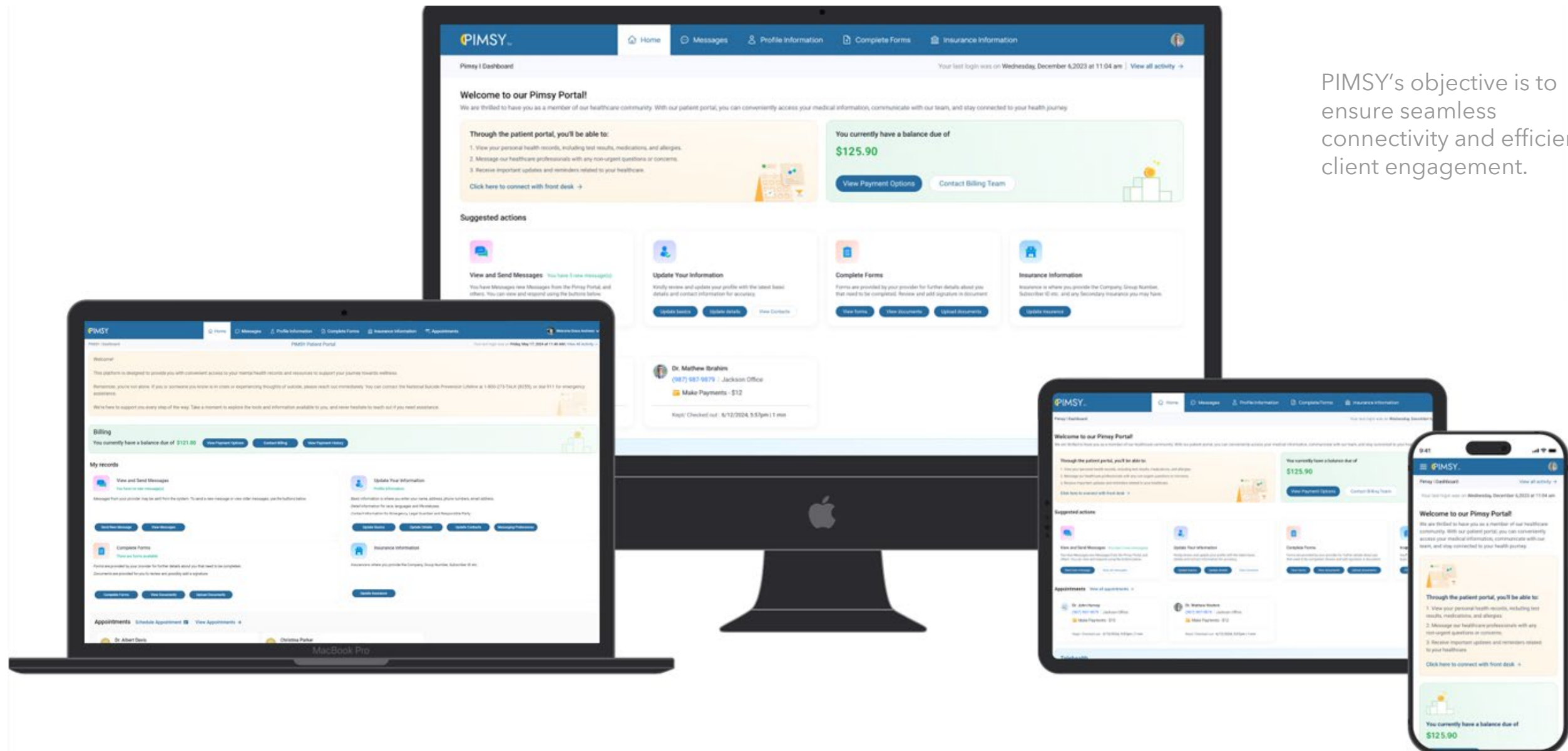
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# The New Client Portal

## Quick Guide

# PIMSY Client Portal

The PIMSY Client Portal provides clients with flexible access to their secure client portal, either through the mobile app (IOS/Android) or web-based platform, based on their preference. With this versatile system, clients can easily request new appointments, make payments, communicate securely via Secure Messages, and complete necessary intake paperwork.



PIMSY's objective is to ensure seamless connectivity and efficient client engagement.

PIMSY Home Messages Profile Information Complete Forms Insurance Information Appointments Welcome Grace Andrews

PIMSY | Dashboard PIMSY Patient Portal Your last login was on Friday, May 17, 2024 at 11:40 AM | View All Activity →

Header Section

Welcome!

This platform is designed to provide you with convenient access to your mental health records and resources to support your journey towards wellness.

Remember, you're not alone. If you or someone you know is in crisis or experiencing thoughts of suicide, please reach out immediately. You can contact the National Suicide Prevention Lifeline at 1-800-273-TALK (8255), or dial 911 for emergency assistance.

We're here to support you every step of the way. Take a moment to explore the tools and information available to you, and never hesitate to reach out if you need assistance.

Welcome Message

**Billing**

You currently have a balance due of **\$121.00**

[View Payment Options](#) [Contact Billing](#) [View Payment History](#)

Billing Section

## My records

**View and Send Messages**

You have no new message(s)

Messages from your provider may be sent from the system. To send a new message or view older messages, use the buttons below.

[Send New Message](#) [View Messages](#)

**Update Your Information**

Profile Information.

Basic information is where you enter your name, address, phone numbers, email address.  
Detail information for race, languages and life statuses.  
Contact information for Emergency, Legal Guardian and Responsible Party.

[Update Basics](#) [Update Details](#) [Update Contacts](#)  
[Messaging Preferences](#)

My Records

- View and Send Messages
- Update your information
- Complete Forms
- Insurance Information

**Complete Forms**

There are forms available.

Forms are provided by your provider for further details about you that need to be completed.  
Documents are provided for you to review and possibly add a signature.

[Complete Forms](#) [View Documents](#) [Upload Documents](#)

**Insurance Information**

Insurance is where you provide the Company, Group Number, Subscriber ID etc.

[Update Insurance](#)

Appointments

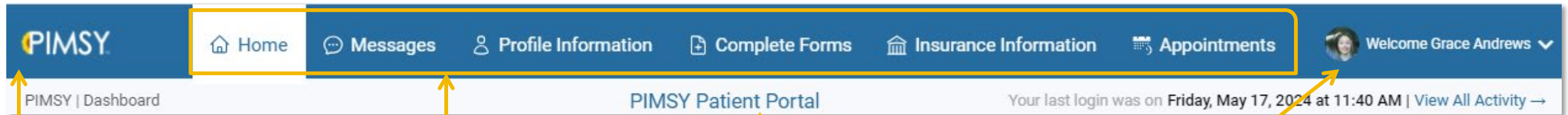
- Book Appointment
- View Appointments
- Join Telehealth Session
- Make payment on Session

Appointments [Schedule Appointment](#) [View Appointments](#)

<p><b>Dr. Albert Davis</b> (888) 254-1245   Parker House Make Payment - \$50 5/21/2024, 8:30 AM   30Mins. Scheduled <a href="#">Join Meeting</a></p>	<p><b>Christina Parker</b> (888) 254-1245   Parker House Make Payment - \$50 5/23/2024, 11:00 AM   60Mins. Pending Approval</p>
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## Top Menu Bar

The New Client Portal is enhanced with visual and functional changes that provide a more intuitive experience for the clients.



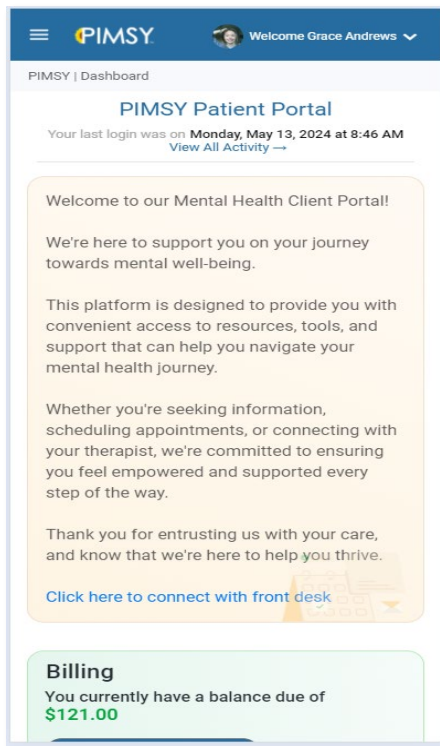
1. Your Logo is positioned on the left, serving as a quick menu to return to the dashboard from other details pages.

2. The main menus are located at the top, facilitating easy and seamless navigation.

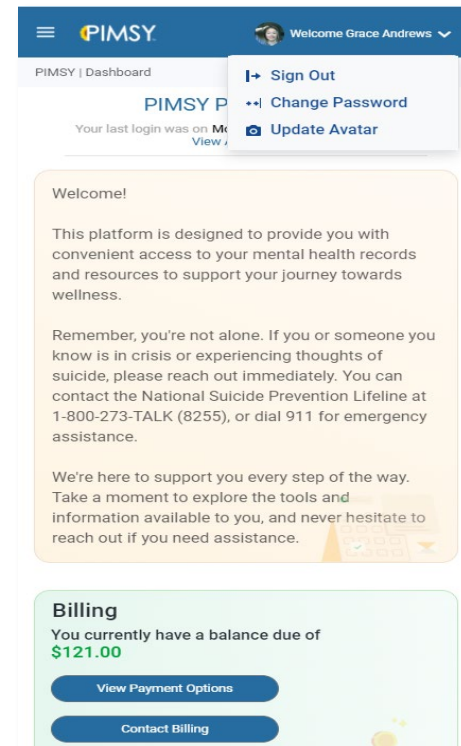
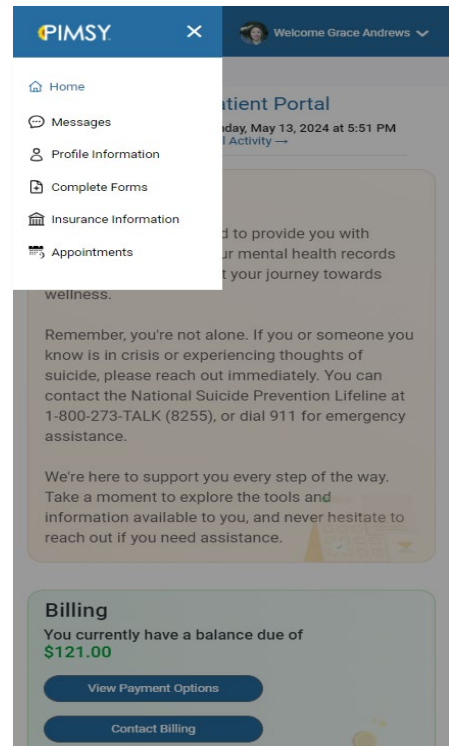
3. The practice's preferred title for the portal is determined by setting **-328**

4. On the right side, clients can find options for password reset, signing out, and updating the profile picture.

5. Audit activities are captured and displayed below the main menus to ensure compliance with ONC-HIT standards



Mobile view



Mobile view

### Customizable Welcome Message

PIMSY focuses on client-centric design, customization, and personalization. The following message, intended for clients, can be customized by the practice according to their specific needs.


Setting **-330** allows you to change the default Portal instruction text that is posted on the client portal.

Welcome!

This platform is designed to provide you with convenient access to your mental health records and resources to support your journey towards wellness.

Remember, you're not alone. If you or someone you know is in crisis or experiencing thoughts of suicide, please reach out immediately. You can contact the National Suicide Prevention Lifeline at 1-800-273-TALK (8255), or dial 911 for emergency assistance.

We're here to support you every step of the way. Take a moment to explore the tools and information available to you, and never hesitate to reach out if you need assistance.




### Billing Information

PIMSY client portal provides convenient billing features, enabling you to securely manage your payments online, review payment history and communicate with billing team for questions.

**Billing**

You currently have a balance due of **\$0.00**

[View Payment Options](#) [Contact Billing](#) [View Payment History](#)



## Statements

Here, clients can view statements that detail total due, description, performed by, and the option to make a payment.

To hide *Make Manual Payment*, use setting **-664**.

To hide payment option on invoices, use setting **-663**.

## History

When selecting the history tab, clients can view their payment history.

This can be turned on/off via setting **-762**.

## Contact Billing

When selecting the Contact Billing tab, clients can send billing messages.

This area will be hidden if there isn't an email provided in setting **-641**.

TOTAL DUE	DATE	DESCRIPTION	PERFORMED BY	
\$25.00	3/20/2022, 7:45 AM	LC Life Coach	System Administrator, LCSW	Pay
\$25.00	3/15/2022, 8:00 AM	LC Life Coach	System Administrator, LCSW	Pay
\$25.00	1/24/2022, 1:00 PM	LC Life Coach	System Administrator, LCSW	Pay
\$25.00	12/16/2021, 8:30 AM	LC Life Coach	System Administrator, LCSW	Pay

Make Manual Payment

PAYMENT	AMOUNT	SERVICE	INVOICE	
1/25/2022, 2:06 PM	\$20.00		INV-16100	Receipt
9/7/2021, 11:45 AM	\$2.00	9/7/2021, 8:10 AM	INV-13814	Receipt

CONTACT BILLING

MESSAGE

Send Message



## View and Send Messages

You have no new message(s)

Messages from your provider may be sent from the system. To send a new message or view older messages, use the buttons below.

Send New Message

View Messages

## View and Send Messages

Here, clients can send messages to the provider via the **Send New Message** button, they can also view messages from the provider via the **View Messages** button.

This can be exposed by setting **-620**.



## Update Your Information

Profile Information.

Basic information is where you enter your name, address, phone numbers, email address.

Detail information for race, languages and life statuses.

Contact information for Emergency, Legal Guardian and Responsible Party.

Update Basics

Update Details

Update Contacts

## Update Your Information

To update client information, click the **Update Basics** button. Here, you can enter/update your address, phone numbers, and email. This is controlled by settings **-621** and **-636**.

To update information for race, languages, and life statuses, click the **Update Details** button.

To update contact information for Emergency, Legal Guardian, and Responsible Party, click the **Update Contacts** button.

## Complete Forms

Here, clients can complete forms and documents by clicking either the **View Forms** or **View Documents** buttons.


To upload documents, click **Upload Documents**.

This is controlled by the provider's document type setup and the forms assigned to client by the provider.

## Insurance Information

To update insurance information, clients can click the **Update Insurance** button.

This is controlled by setting **-366**.




### View and Send Messages

You have no new message(s)

Messages from your provider may be sent from the system. To send a new message or view older messages, use the buttons below.

[Send New Message](#) [View Messages](#)



### Insurance Information

Insurance is where you provide the Company, Group Number, Subscriber ID etc.

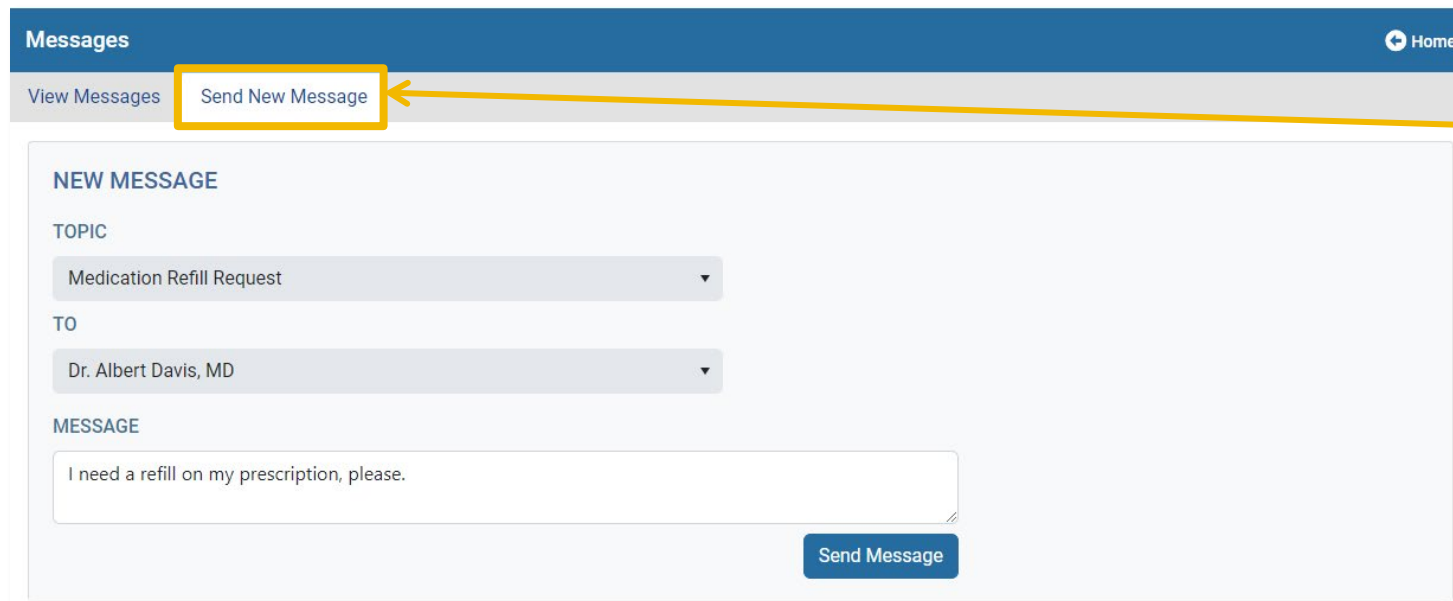
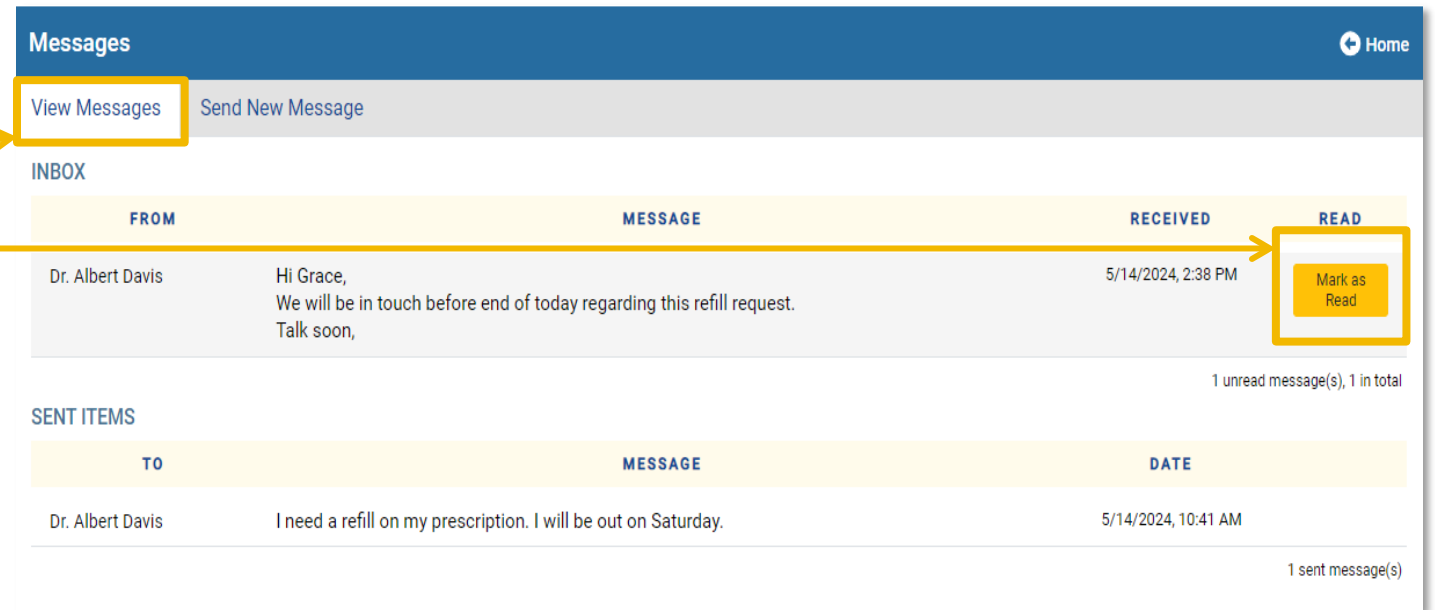
[Update Insurance](#)



## Viewing Messages

Selecting the **View Messages** tab will bring up any messages from the provider for the client.

Selecting **Mark as Read** will clear the message out.

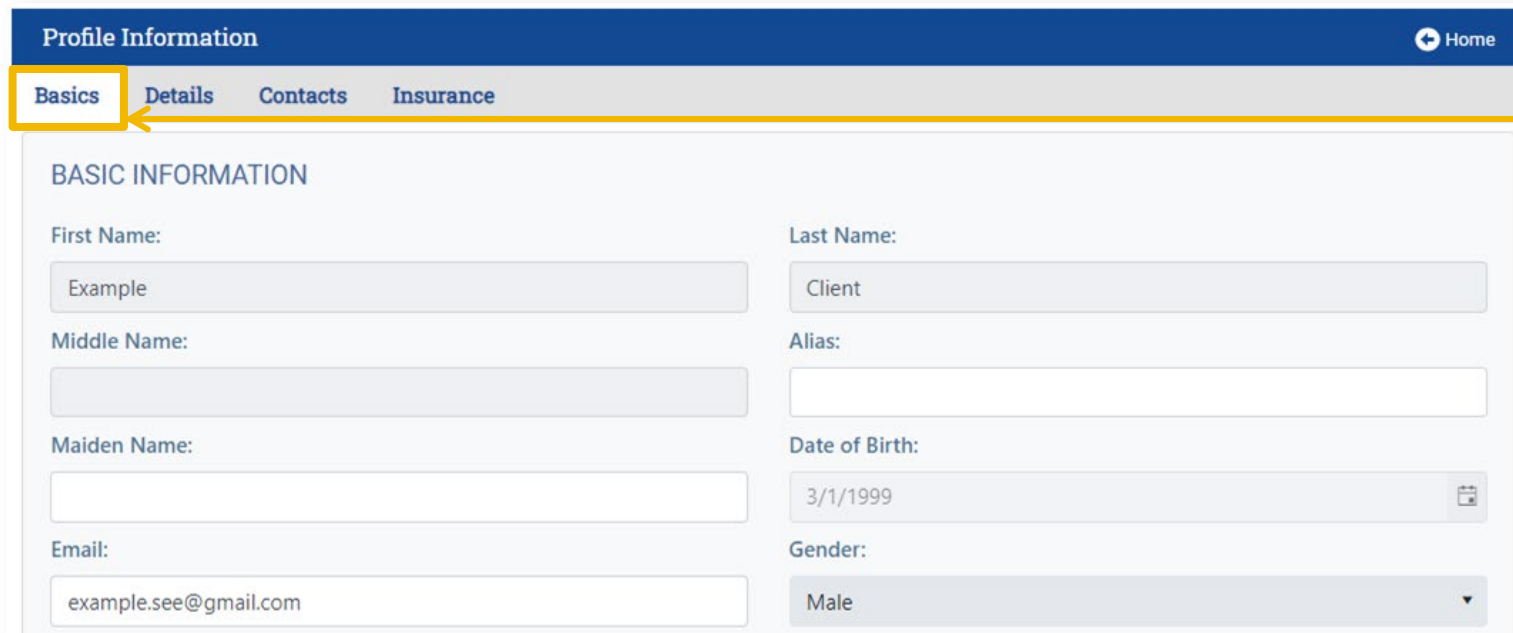


## Send New Messages

Selecting the **Send New Message** tab will give the client the option to send a message to their provider's office.

The options you see in the Topic dropdown depend on which Topic Types are set to show up on the Client Portal. Clients can pick a topic type for their message, and it'll be sent to users assigned under the selected user group for that topic type. If a client picks a topic without an assigned user group, they'll need to choose a specific person to send the message to.

For setup instructions, please reference this [guide](#)



The screenshot shows the 'Profile Information' page with the 'Basics' tab selected. The page title is 'Profile Information' and there is a 'Home' button. The 'Basics' tab is highlighted with a yellow box and an arrow. The form contains the following fields:

BASIC INFORMATION	
First Name: Example	Last Name: Client
Middle Name: 	Alias: 
Maiden Name: 	Date of Birth: 3/1/1999
Email: example.see@gmail.com	Gender: Male

## Basics

Selecting the **Basics** tab will allow clients to view and/or modify their basic information.

Client access is controlled by setting **-636**.

Read only can be turned on/off via setting **-621**.



The screenshot shows the 'Profile Information' page with the 'Details' tab selected. The page title is 'Profile Information' and there is a 'Home' button. The 'Details' tab is highlighted with a yellow box and an arrow. The form contains the following fields:

DETAIL INFORMATION	
Race: Native Hawaiian or Other Pacific Islander	Language: 
Ethnicity: Non- Hispanic	<input type="checkbox"/> English Proficient
<input type="checkbox"/> Pregnant	Residence Type: 
Living Arrangement: Other	

## Details

Selecting the **Details** tab will allow clients to view and/or modify their demographic information.

Client access is controlled by setting **-649**.

Read only can be turned on/off via setting **-622**.

## Contacts

Selecting **Contacts** tab will allow viewing and or modifying of client contact information.

Read only can be turned on/off for all items via setting **-624**.

To modify Responsible Party use setting **-623**.



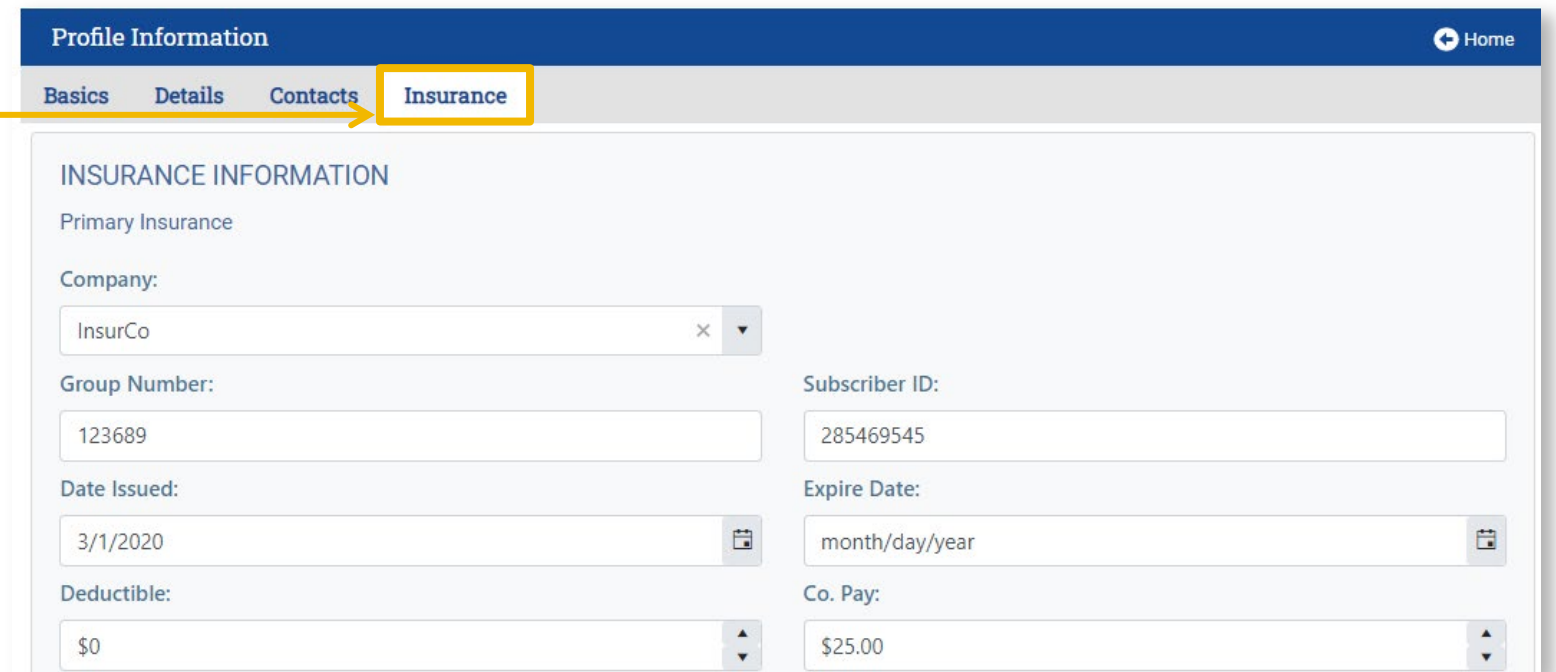
The screenshot shows the 'Profile Information' page with the 'Contacts' tab selected. The page has a dark blue header with 'Profile Information' and a 'Home' button. Below the header is a navigation bar with tabs: 'Basics', 'Details', 'Contacts' (highlighted with a yellow box and an arrow), and 'Insurance'. The main content area is a table with columns 'CONTACT TYPE' and 'CONTACT'. Each row has an 'Edit' button on the right.

CONTACT TYPE	CONTACT	
Emergency	Example Parent (258) 456-7895	Edit
Legal Guardian	Example Father (568) 945-6896	Edit
Preferred Physician	Example Services 725 Wilton Ave District of Columbia (897) 546-2132	Edit
Responsible Party	Example Parent (258) 456-7895	Edit

## Insurance Information

Selecting the **Insurance** tab will allow viewing and or modifying of client insurance information.

To hide the Insurance Tab use setting **-366**.



The screenshot shows the 'Profile Information' page with the 'Insurance' tab selected. The page has a dark blue header with 'Profile Information' and a 'Home' button. Below the header is a navigation bar with tabs: 'Basics', 'Details', 'Contacts', and 'Insurance' (highlighted with a yellow box and an arrow). The main content area is titled 'INSURANCE INFORMATION' and contains several input fields for insurance details.

INSURANCE INFORMATION	
Primary Insurance	
Company:	InsurCo
Group Number:	123689
Date Issued:	3/1/2020
Deductible:	\$0
Subscriber ID:	285469545
Expire Date:	month/day/year
Co. Pay:	\$25.00

Library				Home
Forms	Documents	Upload	CCD Download	
FORMS				
GAD-7	5/14/2024	5/21/2024		
MDQ				
PHQ-9	5/14/2024	5/21/2024		

## Forms

### Q&A Forms Page Updates

We have added new columns on the Q&A Forms page for the *Last Completed Date* and the *Next Due Date*. The *Next Due Date* column will be driven by your renewal setup.

Please refer to the [Renewals guide](#) to learn more on how to set up renewals.

Library				Home
Forms	Documents	Upload	CCD Download	
<b>Documents to Complete</b>				
Name	Description	Last Completed	Created	
Registration Form _T	Complete once		3/25/2022	
HIPAA Form	Save for your records		3/25/2022	
<b>Completed Documents</b>				
Name	Description	Last Completed	Created	
<b>Documents Updated via Portal</b>				
Release of Information	For your reference- PRINT for your records - SIGNED	3/25/2022, 8:24 PM	3/25/2022	

## Documents

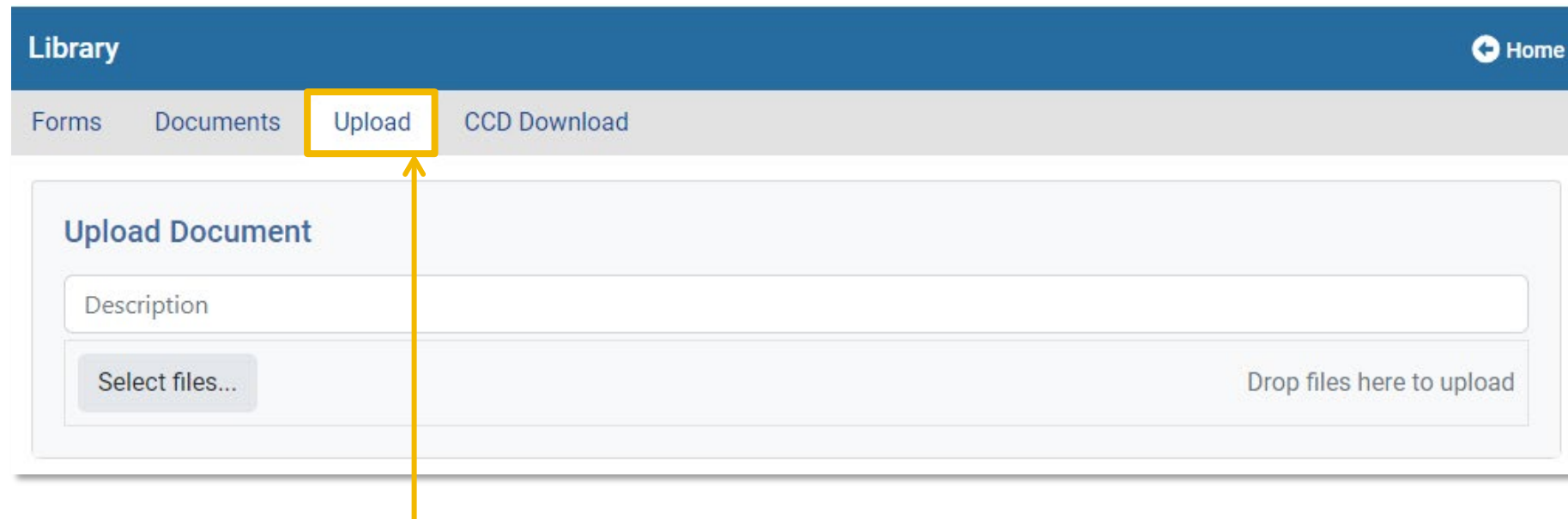
Selecting the **Documents** tab will show any forms that need to be completed and that have been completed by the client.

Selecting a document will bring it up for the client to review and/or make edits.

Clients can also save documents to complete for later if they are unable to complete at that time.

*\*In the document settings, documents that are not checked as "Persistent on Client Portal" will be removed from the Documents to Complete section in the portal once the client has saved and completed the document. This would be used for documents that are only completed once.*

\*Please note that document descriptions will show on the client portal and can be used for instructions.

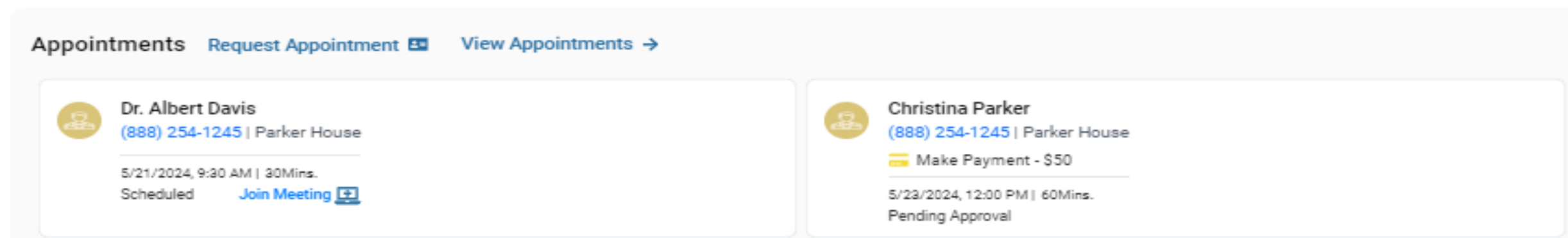


## Upload Documents

Selecting the **Upload** tab will allow clients to upload any necessary forms. Clients can either select the files from their local drive or they can drag & drop to upload the file.

## Appointments

To improve client satisfaction and reduce administrative burden, PIMSY provides appointment booking option for the clients with clinicians through the client portal. Clients will be able to book appointments with their assigned primary therapist and internal physician



When viewing the appointments panel at the bottom on the main page, in addition to the date and general appointment information, clients may notice them in either blue or yellow.

Blue represents appointments that have already occurred.

Yellow represents future appointments and may have a telehealth link available.


If available, the option to make a payment may be visible.

### New Appointment

Clients are given the option to book an appointment in their preferred timeslots, based on the schedule preferences set by the provider.

Providers can set their bio, years of experience, and specialties under the Public Profile Q&A section, which will be visible to the clients as shown below. Based on the purpose of the visit and available time slot, clients will be able to book their appointments.

Appointments [View current appointments →](#) [View all appointments →](#)



**Christina Parker, LCSW**  
Licensed Clinical Social Worker

My experience includes work with individuals, couples, families and groups, including adolescent, adults and eldercare issues. I have also worked in low cost clinics, in-patient substance abuse facilities, corporate wellness and private practice over the past 20 years. I provide honest, targeted and solution focused counseling. I want the best for you. I believ...  
[Read more](#)

- 14 Years of Experience
- Specializes in Anxiety
- Develop Provider - Hawaii Office  
Honolulu, HI 68978

[Change Provider](#)

What is the Purpose for your visit?  
60 Minute Psychotherapy

Appointment Type:  
 In-Person  Telehealth

Select Your Date  
May 2024

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Select Your Time

Morning  
9:00 AM 10:00 AM 11:00 AM

Afternoon  
12:00 PM 1:00 PM 2:00 PM

Evening  
Slots not available

[Request New Appointment](#)

## View Appointment

When viewing the appointments panel, in addition to the date and general appointment information, clients may notice them green shaded, which means it represents future appointments.

**All Appointments** [Home](#)

<p>Time: 9/2/2024, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Scheduled Type: Not Available</p>	<p>Time: 7/22/2024, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Scheduled Type: Not Available</p>	<p>Time: 6/10/2024, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Scheduled Type: Not Available</p>
<p>Time: 4/29/2024, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>	<p>Time: 3/18/2024, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>	<p>Time: 2/5/2024, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>
<p>Time: 12/25/2023, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>	<p>Time: 11/13/2023, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: No Show Type: Not Available</p>	<p>Time: 10/2/2023, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>
<p>Time: 8/21/2023, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>	<p>Time: 7/10/2023, 10:00 AM 60Min(s). Provider: Dr. Albert Davis Location: Healing Water House Status: Checked In Type: Not Available</p>	





*Questions? Comments?*

Please contact us at

**[support@pimsyehr.com](mailto:support@pimsyehr.com)**