



# Beck Institute for Cognitive Behavior Therapy

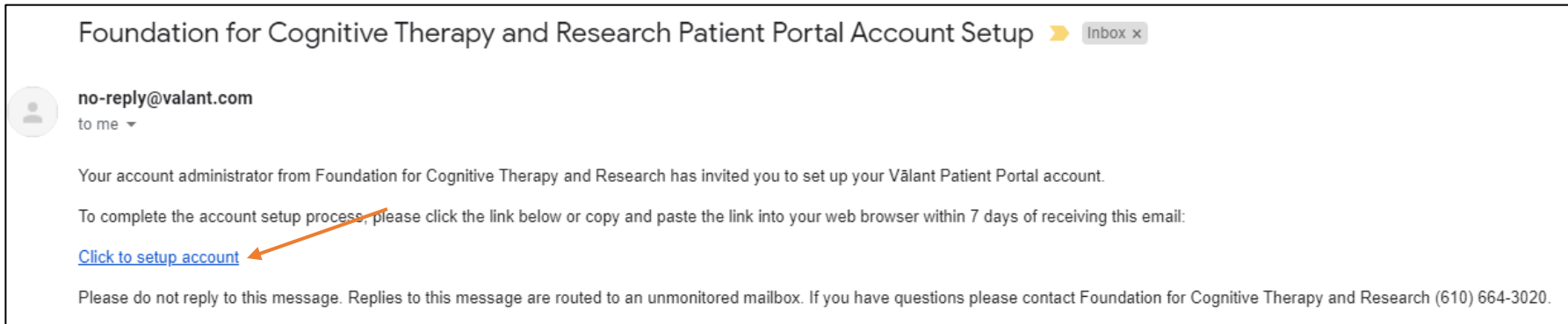
## Guide to the Patient Portal

Beck Institute for Cognitive Behavior Therapy  
One Belmont Avenue, Suite 700 | Bala Cynwyd, PA 19004 | 610-664-3020  
[beckinstitute.org](http://beckinstitute.org)

For questions about the portal, please contact Clinical Services Representative, Tia Jones, at 610-664-3020 x216.

# ACCOUNT SET UP

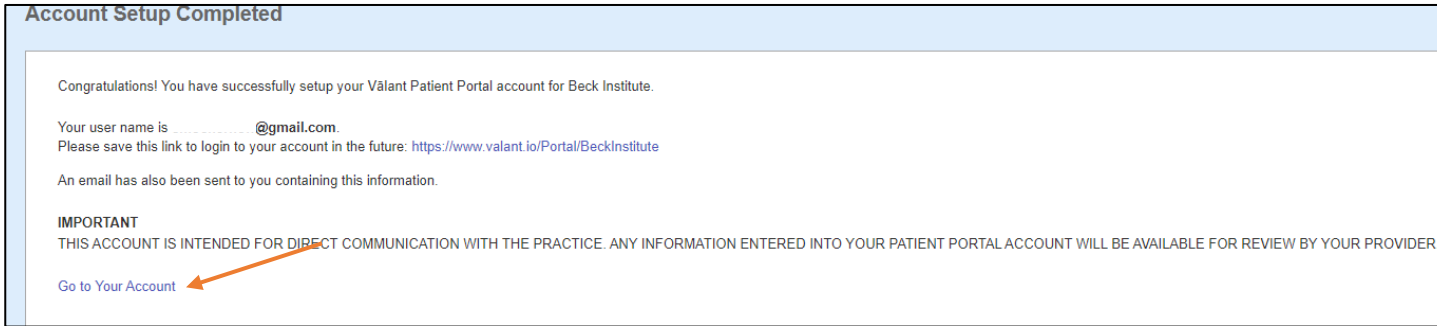
1. Once you agree to sign up for the patient portal, you will receive an email to complete the set up. You will have 7 days to initiate this process before your unique link expires. You can expect the email to look similar to the below. Please select “Click to setup account” to access the Password Setup page.



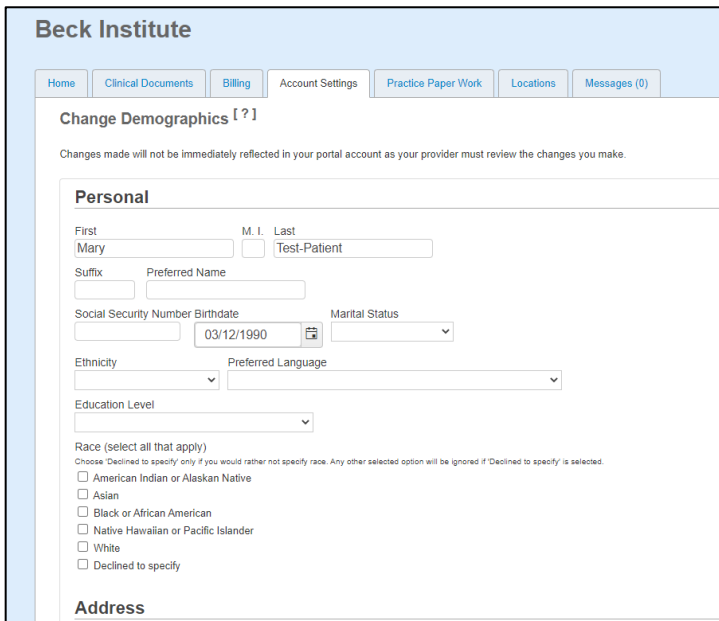
2. Once you have finished selecting your password and security questions, please click “Create Account”.

The screenshot shows a web form titled 'Account Setup' with the instruction: 'Use the form below to set up your account with a password and security questions.' The form is divided into two main sections: 'Password Setup' and 'Security Questions'.  
The 'Password Setup' section includes a note: 'Password must be at least 6 characters long and have at least 1 upper case letter, 1 lower case letter and 1 number or non-alphabetic character (e.g. !@#%&'?).' Below this are two input fields: 'Password' and 'Confirm Password'.  
The 'Security Questions' section contains three questions, each with a dropdown menu for the question and a text input field for the answer. The questions are labeled 'Question 1', 'Question 2', and 'Question 3'.  
At the bottom of the form are two buttons: 'Create Account' and 'Cancel'. An orange arrow points to the 'Create Account' button.

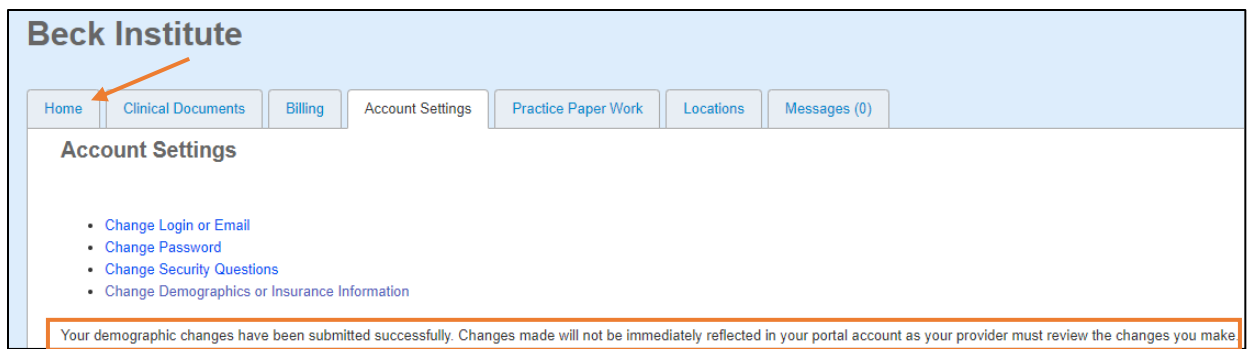
3. You will then receive the following confirmation message. Click on “Go to Your Account” to proceed to the next step.



4. Upon the initial login to your account, you will be asked to update your demographic information. This includes your name, birth date, marital status, address, phone number, email, and more. Please note that a phone number is required to receive phone call or text message appointment reminders. Click “Submit” when finished.



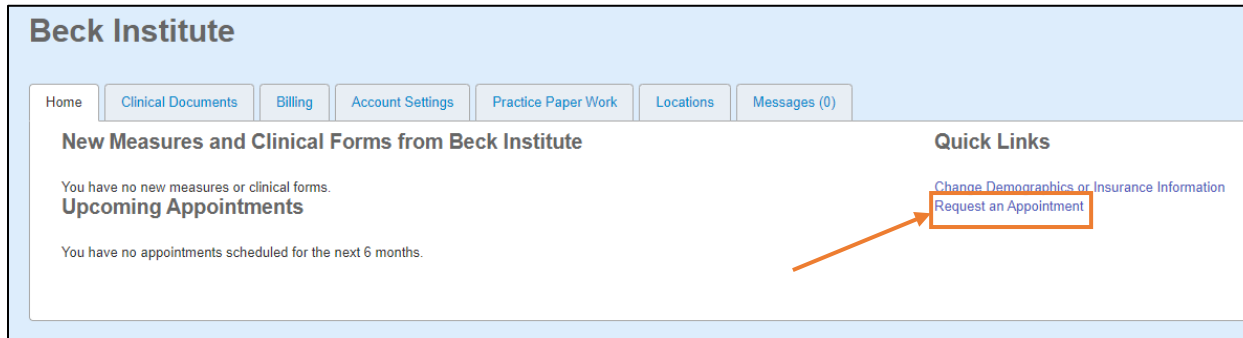
5. Once you update your demographic information, you will receive the following confirmation message. Please click on the “Home” tab to access the main page.



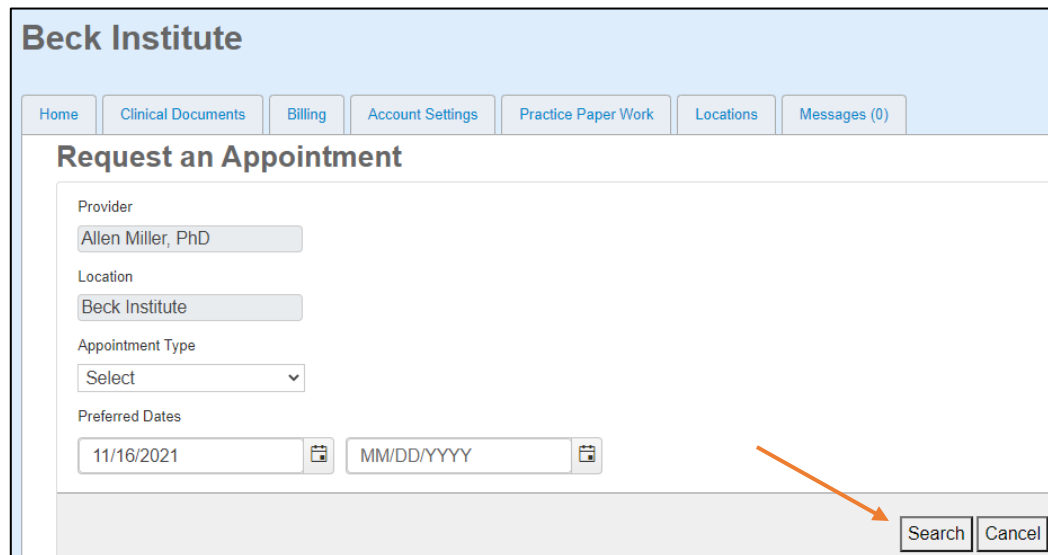
The screenshot displays the Beck Institute user portal interface. At the top, the header reads "Beck Institute". Below the header is a navigation menu with several tabs: "Home", "Clinical Documents", "Billing", "Account Settings", "Practice Paper Work", "Locations", and "Messages (0)". An orange arrow points to the "Home" tab. The main content area is titled "Account Settings" and contains a list of options: "Change Login or Email", "Change Password", "Change Security Questions", and "Change Demographics or Insurance Information". At the bottom of the page, a confirmation message is displayed in a box with an orange border: "Your demographic changes have been submitted successfully. Changes made will not be immediately reflected in your portal account as your provider must review the changes you make".

# REQUESTING AN APPOINTMENT

1. While on the “Home” tab, you will be able to view any upcoming appointments at Beck Institute and request a new appointment by clicking on “Request an Appointment” on the right of your screen.



2. When requesting an appointment, you will be asked to confirm the name of your therapist, appointment type (individual or couples therapy), and preferred dates. Once the information is complete, please click “Search”.



3. The next screen will display available appointments within your preferred dates search parameters. To select an appointment, please click “Request.”

**Request an Appointment**

Provider  
Allen Miller, PhD

Location  
Beck Institute

Appointment Type  
Individual Psychotherapy

Preferred Dates  
11/16/2021 11/20/2021

**Available Appointments**

11/16/2021	8:00 AM - 9:00 AM	Request
11/16/2021	9:00 AM - 10:00 AM	Request
11/16/2021	10:00 AM - 11:00 AM	Request

4. Please note that all appointment requests must be confirmed by our Clinical Services Representative. Once appointment is confirmed, you will receive a confirmation email.
5. **Please note that the portal may not be used to cancel appointments.** Appointments must be cancelled via phone by calling Clinical Services Representative Tia Jones at 610-664-3020 x216.

## PREPARING AND PAYING FOR YOUR APPOINTMENT

1. You will be able to complete all necessary steps to prepare for your appointment by using the patient portal. The home page will list upcoming appointments, as shown below:

The screenshot shows a patient portal interface with a light blue header containing navigation tabs: Home, Clinical Documents, Billing, Account Settings, Practice Paper Work, Locations, and Messages (0). Below the header, the main content area is divided into two sections. On the left, under the heading "New Measures and Clinical Forms from Beck Institute", there is a table with two columns: "Date" and "Message". The table contains two rows of messages, both dated 11/18/2021 12:31:44 PM, with messages asking to complete the GAD-7 and PHQ-9 questionnaires before 12/18/2021. Below this is the "Upcoming Appointments" section, which features a table with columns for "Time", "Provider", and "Location". A single appointment is listed for Friday, Nov 19, 2021 08:00 AM, with the provider Allen Miller, PhD, and the location Beck Institute. This appointment row is highlighted with an orange border. On the right side of the page, under the heading "Quick Links", there are three links: "Change Demographics or Insurance Information", "Make a Payment", and "Request an Appointment".

Date	Message
11/18/2021 12:31:44 PM	Please complete the <a href="#">GAD-7</a> before 12/18/2021.
11/18/2021 12:31:44 PM	Please complete the <a href="#">PHQ-9</a> before 12/18/2021.

Time	Provider	Location
Friday, Nov 19, 2021 08:00 AM	Allen Miller, PhD	Beck Institute

2. From time to time, your therapist may ask you to complete a checklist to evaluate your symptoms or gather information about your experiences. These measures will automatically appear on the home page of your patient portal. To complete each questionnaire, please click on its name and follow the instructions.

This screenshot is identical to the one above, but with two orange arrows pointing to the hyperlinks "GAD-7" and "PHQ-9" in the message table, indicating where a user should click to access the questionnaires.

3. Once you finalize your answers, please press “Submit”.

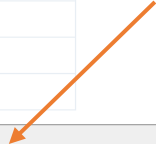
**Edit GAD-7**

**GAD-7**

Please read each statement and select a number 0, 1, 2 or 3 which indicates how much the statement applied to you over the past two weeks. There are no right or wrong answers. Do not spend too much time on any one statement. If you are concerned about your results in any way, please speak with a qualified health professional.

0: Not at all   1: Several days   2: More than half the days   3: Nearly every day

Feeling nervous, anxious or on edge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not being able to stop or control worrying	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worrying too much about different things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trouble relaxing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Being so restless that it is hard to sit still	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Becoming easily annoyed or irritable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feeling afraid as if something awful might happen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



4. We will continue to ask you to **prepay for your visits, as outlined by our clinic policy**. To make a one-time payment, please click “Make a Payment” on the right side of your home page.

Home   Clinical Documents   Billing   Account Settings   Practice Paper Work   Locations   Messages (0)

**New Measures and Clinical Forms from Beck Institute**


Date	Message
11/18/2021 12:31:44 PM	Please complete the <a href="#">GAD-7</a> before 12/18/2021.
11/18/2021 12:31:44 PM	Please complete the <a href="#">PHQ-9</a> before 12/18/2021.

**Upcoming Appointments**

Time	Provider	Location
Friday, Nov 19, 2021 08:00 AM	Allen Miller, PhD	<a href="#">Beck Institute</a>

**Quick Links**

- [Change Demographics or Insurance Information](#)
- [Make a Payment](#)
- [Request an Appointment](#)





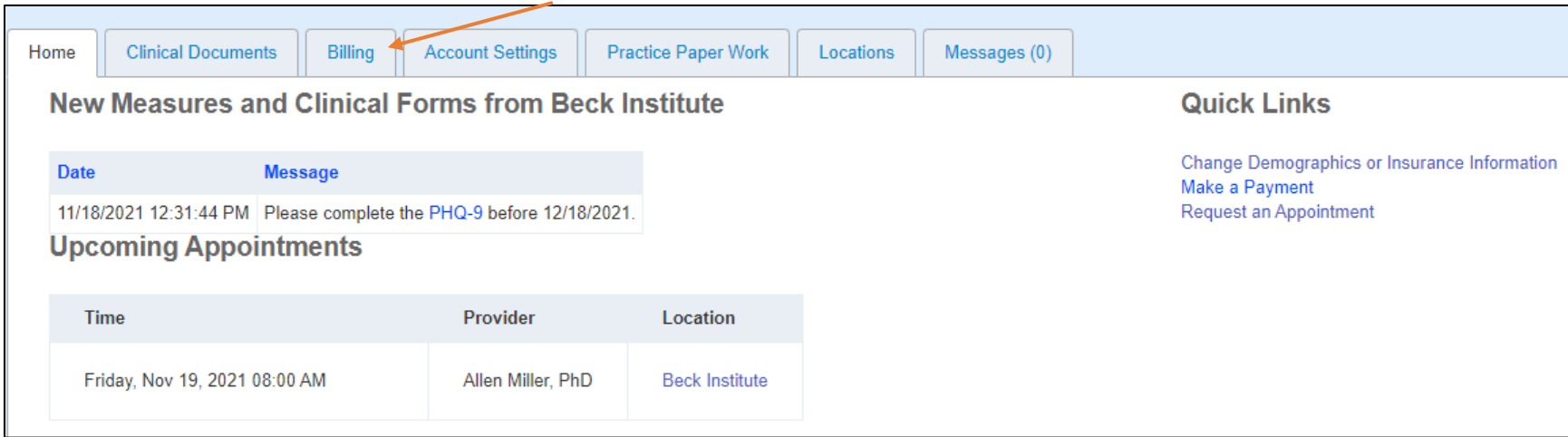
5. The “Automated Payment Processing” page will allow you to securely enter your credit card information, amount of prepayment, as well as your billing information.
- If you would like to receive a receipt for the transaction, please enter your email on the bottom right. **Please note that the receipt message will NOT be encrypted.** The receipt will NOT include any of your personal information, appointment details, or full credit card number.
  - If you would like to save your card information for future transactions, please click the box next to “Save to Card Manager” on the bottom left and provide a nickname for this form of payment, i.e. “Smith – Visa”.
  - Once ready, please click “Submit” to process payment. Your payments will be automatically reflected in our system and applied to your account on the day of your appointment.

The screenshot shows the 'Automated Payment Processing' form with two tabs: 'Payment Transaction' (active) and 'Card Manager'. The form is divided into several sections:

- Select Card:** A dropdown menu currently shows 'New Card'.
- Amount:** A text input field containing '\$0.00' with a red error icon and a spinner.
- Card Details:** Includes fields for 'Card Number', 'Expiration Date', and 'CVV', all with red error icons.
- Billing Information:** Includes radio buttons for 'Patient: Use Patient's Billing Information' (selected), 'New: Type Billing Information', 'Guarantor: Use Guarantor's Billing Information', and 'Card Manager: Card Manager Entry'. It also has text input fields for 'First Name' (Mary), 'Last Name' (Test-Patient), 'Address 1', 'Address 2', 'City', 'State' (UT), and 'Zip' (with a red error icon).
- Email for Receipt:** A text input field containing 'xxxxx@gmail.com' is highlighted with an orange box and an arrow.
- Save to Card Manager:** A checkbox is present, with an arrow pointing to it from the left.
- Buttons:** 'Submit' and 'Cancel' buttons are at the bottom right, with an arrow pointing to 'Submit'.

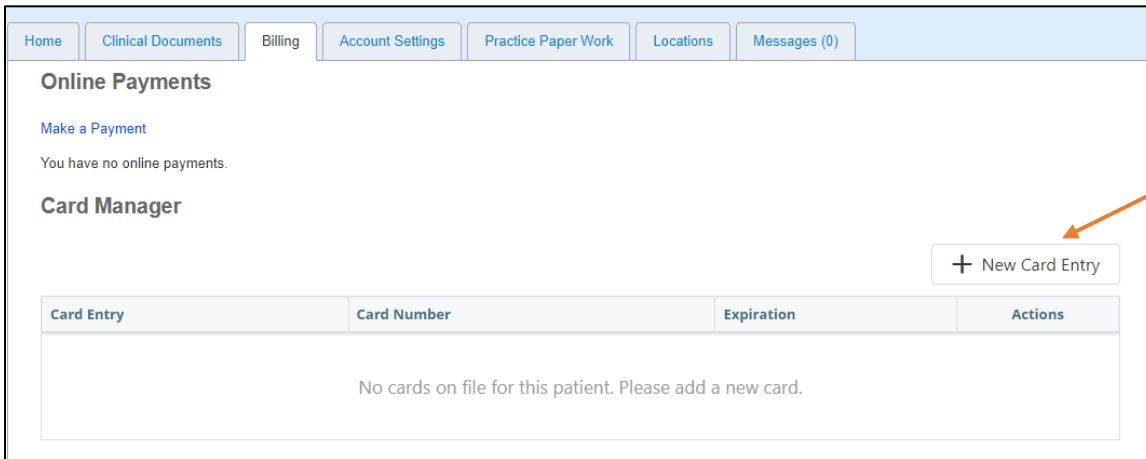
Red error icons are present on the Amount, Card Number, Expiration Date, CVV, Address 1, and Zip fields. Orange arrows point to the 'Save to Card Manager' checkbox, the 'Email for Receipt' field, and the 'Submit' button.

6. To save your credit card and automate future transactions (optional), please click on “Billing” tab.



The screenshot shows a patient portal dashboard with a navigation bar at the top containing tabs for Home, Clinical Documents, Billing, Account Settings, Practice Paper Work, Locations, and Messages (0). The Billing tab is selected and highlighted with an orange arrow. Below the navigation bar, the main content area is divided into two sections. On the left, there is a section titled "New Measures and Clinical Forms from Beck Institute" which contains a table with two columns: "Date" and "Message". The table has one row with the date "11/18/2021 12:31:44 PM" and the message "Please complete the PHQ-9 before 12/18/2021." Below this is a section titled "Upcoming Appointments" with a table with three columns: "Time", "Provider", and "Location". The table has one row with the time "Friday, Nov 19, 2021 08:00 AM", the provider "Allen Miller, PhD", and the location "Beck Institute". On the right side of the dashboard, there is a section titled "Quick Links" with three links: "Change Demographics or Insurance Information", "Make a Payment", and "Request an Appointment".

7. Select “New Card Entry” on the right of your screen.



The screenshot shows the "Card Manager" section of the patient portal. At the top, there is a navigation bar with tabs for Home, Clinical Documents, Billing, Account Settings, Practice Paper Work, Locations, and Messages (0). The Billing tab is selected. Below the navigation bar, there is a section titled "Online Payments" with a link for "Make a Payment" and the text "You have no online payments." Below this is the "Card Manager" section. On the right side of the Card Manager section, there is a button labeled "+ New Card Entry" with an orange arrow pointing to it. Below the button is a table with four columns: "Card Entry", "Card Number", "Expiration", and "Actions". The table is currently empty, and below it, there is a message that says "No cards on file for this patient. Please add a new card."

8. Fill in your credit card information, email for receipt if needed, and click “OK.” Your credit card will be safely stored in our EHR system for future use.

### New Card Manager Entry

#### Card Details

Card Entry  !

Card Number  !

Expiration Date  !  !

CVV  !

#### Billing Information

Patient: Use Patient's Billing Information  
 New: Type Billing Information  
 Guarantor: Use Guarantor's Billing Information  
 Card Manager: Card Manager Entry

First Name  Last Name

Address 1  !

Address 2

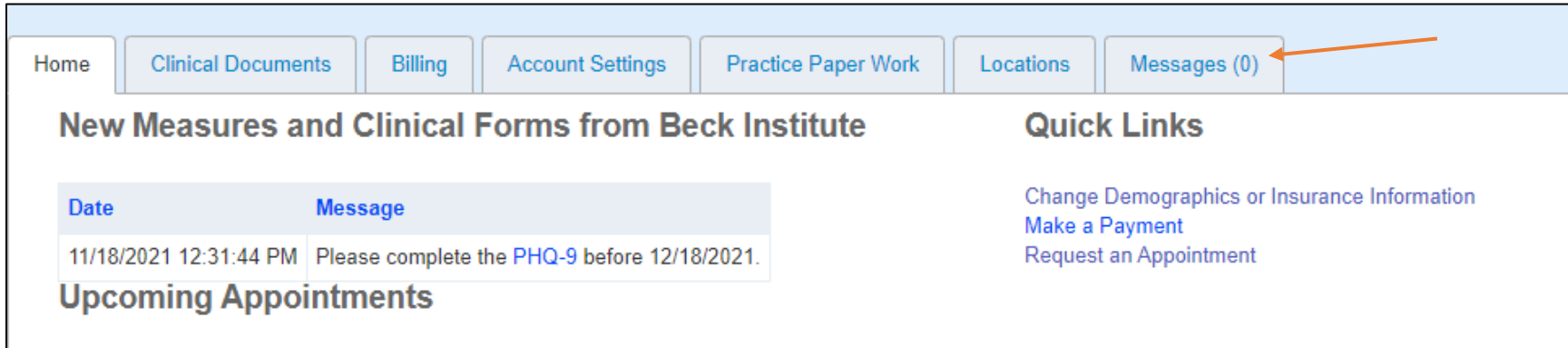
City  State  Zip  !

Email for Receipt

OK Cancel

## SENDING SECURE MESSAGES TO YOUR THERAPIST

1. Our new system comes with a secure messaging option. To communicate with your therapist, please click on “Messages” tab.



The screenshot shows a navigation bar with tabs: Home, Clinical Documents, Billing, Account Settings, Practice Paper Work, Locations, and Messages (0). An orange arrow points to the 'Messages (0)' tab. Below the navigation bar, there are two main sections: 'New Measures and Clinical Forms from Beck Institute' and 'Quick Links'. The 'New Measures and Clinical Forms' section contains a table with one row of data. The 'Quick Links' section lists three links: 'Change Demographics or Insurance Information', 'Make a Payment', and 'Request an Appointment'.

Date	Message
11/18/2021 12:31:44 PM	Please complete the PHQ-9 before 12/18/2021.

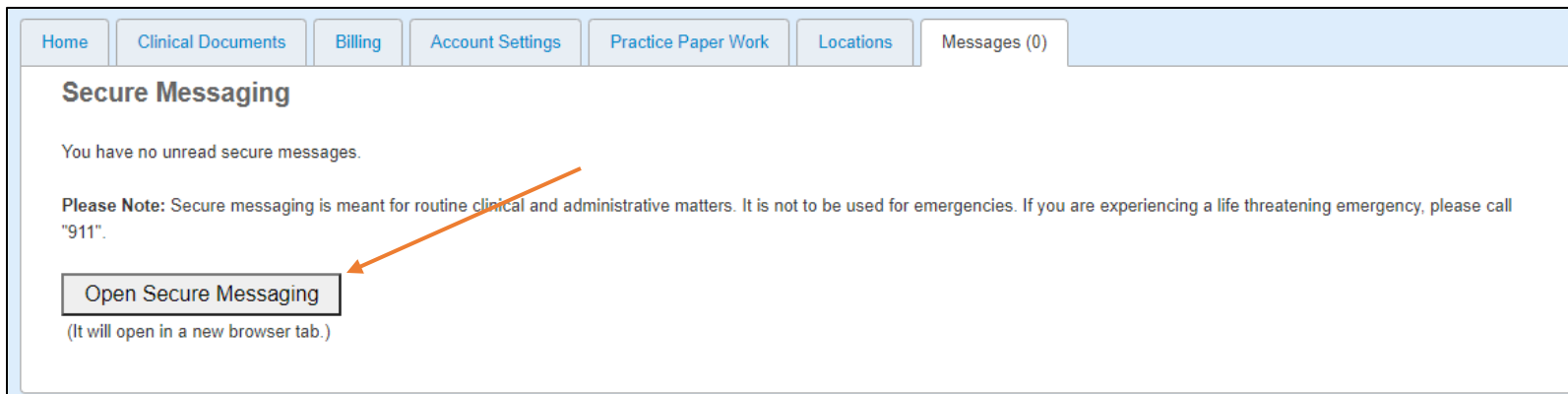
**Upcoming Appointments**

**Quick Links**

- [Change Demographics or Insurance Information](#)
- [Make a Payment](#)
- [Request an Appointment](#)

2. Next, click “Open Secure Messaging.” **Please note that this communication tool is NOT TO BE USED FOR EMERGENCIES. If you are experiencing a crisis, call 911, go to your nearest hospital emergency room, or contact the National Suicide Prevention Lifeline at 1-800-273-TALK (8255).**

Additionally, the secure messaging feature may not be used to cancel appointments. Appointments must be cancelled via phone by calling Clinical Services Representative Tia Jones at 610-664-3020 x216.



The screenshot shows the 'Secure Messaging' page. The navigation bar is the same as in the previous screenshot, with 'Messages (0)' selected. The main content area has the heading 'Secure Messaging' and the text 'You have no unread secure messages.' Below this is a 'Please Note' section with a warning about not using secure messaging for emergencies. At the bottom, there is a button labeled 'Open Secure Messaging' with a subtext '(It will open in a new browser tab.)'. An orange arrow points to this button.

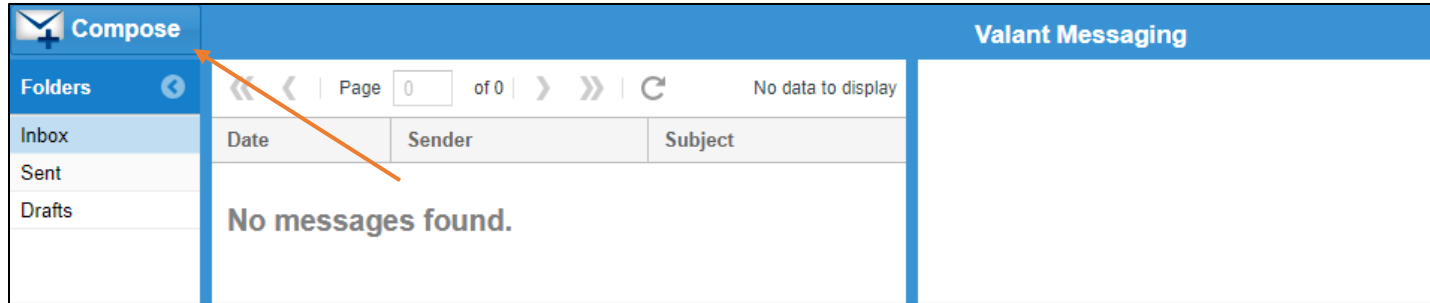
**Secure Messaging**

You have no unread secure messages.

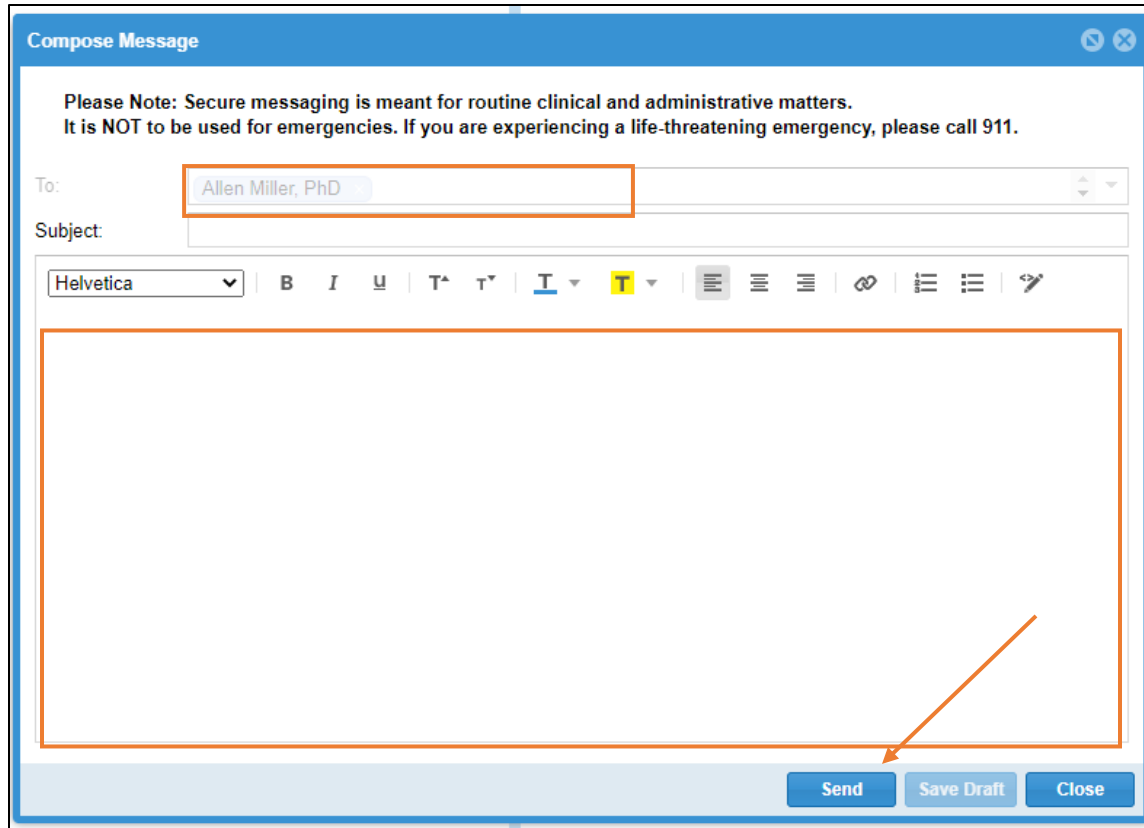
**Please Note:** Secure messaging is meant for routine clinical and administrative matters. It is not to be used for emergencies. If you are experiencing a life threatening emergency, please call "911".

[Open Secure Messaging](#)  
(It will open in a new browser tab.)

3. To send a message, please click “Compose” on the top left of your screen.



4. On the next page, please confirm the name of your clinician. Complete your subject and message and click “Send.” Your therapist will typically respond within 24 to 48 hours, excluding weekends and holidays.



If you have any questions or need more information, please contact our **Clinical Services Representative Tia Jones at 610-664-3020 x 216.**