Beck Institute for Cognitive Behavior Therapy
Guide to the Patient Portal

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.

   ![Email Example]

   Foundation for Cognitive Therapy and Research Patient Portal Account Setup

   no-reply@valant.com

   to me

   Your account administrator from Foundation for Cognitive Therapy and Research has invited you to set up your Valant Patient Portal account.

   To complete the account setup process, please click the link below or copy and paste the link into your web browser within 7 days of receiving this email:

   Click to setup account

   Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions please contact Foundation for Cognitive Therapy and Research (610) 664-3020

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

   ![Password Setup Diagram]
   
   ![Security Questions Diagram]
3. You will then receive the following confirmation message. Click on “Go to Your Account” to proceed to the next step.

![Account Setup Completed]

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.

![Beck Institute]

![Change Demographics]

[Important note: This account is intended for direct communication with the practice. Any information entered into your patient portal account will be available for review by your provider.]

Go to Your Account
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.
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”.

![Requesting an Appointment](image1.png)

![Request an Appointment](image2.png)
3. The next screen will display available appointments within your preferred dates search parameters. To select an appointment, please click “Request.”

![Request an Appointment](image)

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.
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:

![Home page screenshot]

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.

![Home page screenshot]
3. Once you finalize your answers, please press “Submit”.

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

7. Select “New Card Entry” on the right of your screen.
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.
1. Our new system comes with a secure messaging option. To communicate with your therapist, please click on “Messages” tab.

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.
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.