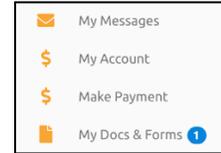# Client Portal: Overview & Tips

Dashboard
The dashboard shows items such as forms that are due and account balances, if any. If forms are assigned to you, a number is displayed next to *My Docs & Forms.*

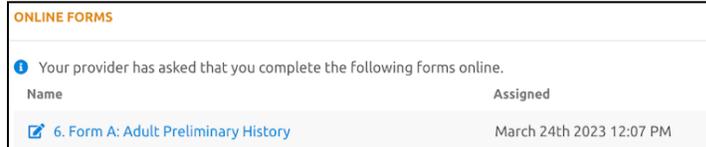|	
✉	My Messages
$	My Account
$	Make Payment
📄	My Docs & Forms ❶

Make a Payment
Payments can be made with a card on file or a new card. New cards are automatically added to the account but will not become the default card. If you'd like to remove the new card from your account, please go to *My Profile* where you may delete it.
Note: Occasionally a balance shown may be owed by insurance rather than the client. For questions, you are welcome to contact us anytime at info@fourpointscc.com.

My Docs & Forms
This area contains assigned paperwork and previously completed forms.

ONLINE FORMS

ⓘ Your provider has asked that you complete the following forms online.

| Name	Assigned
✎ 6. Form A: Adult Preliminary History	March 24th 2023 12:07 PM

My Profile
Update profile info including phone, email, credit card, username/password and more under *My Profile* by clicking the pencil icon.

Default credit card: The blue star indicates the card set as the default, which is the card charged after sessions for any payment responsibility such as a copay.
To change the default, click the star next to the card you want to become the new default card.
Note: Existing cards cannot be edited (other than changing the default). To make an update, for example add a new expiration date, please add the card as if it were new and delete the old version.
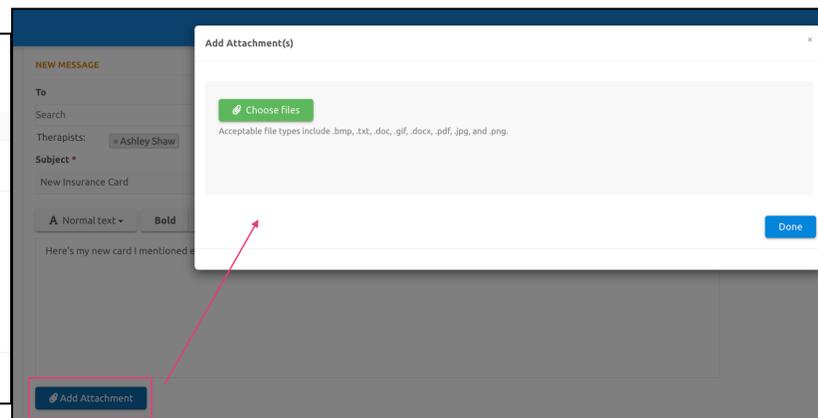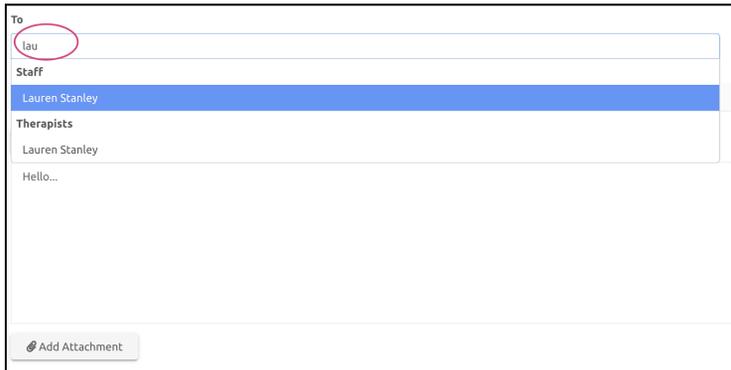
CREDIT CARDS

☆	Health Savings Account — Added 5/30/22
★	VISA Debit Card — Added 11/29/21
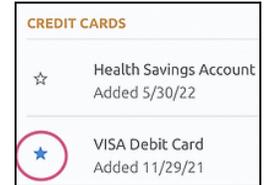
My Account
Access billing and payment history from *My Account.*

ACCOUNT HISTORY

|			Charges	Client Pay.	Ins. Payment	Adj.	To Ded.	Dist. Adj.	Balance	Your Resp.
🗎	03/09/2022	Psychotherapy 60 min	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
🗎	03/02/2022	Psychotherapy 60 min	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
🗎	03/01/2022	Psychotherapy 60 min	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
💳	02/08/2022	Client Credit Refund		10.00					--	

My Messages
This feature allows communication with therapists and admin staff and is a great way to share photos of insurance cards if your policy changes.

To
lau
Staff
Lauren Stanley
Therapists
Lauren Stanley
Hello...

NEW MESSAGE

To
Search
Therapists: × Ashley Shaw
Subject *
New Insurance Card

A Normal text ▾ **Bold**

Here's my new card I mentioned

🔗 Add Attachment

Add Attachment(s)

📁 Choose files
Acceptable file types include .bmp, .txt, .doc, .gif, .docx, .pdf, .jpg, and .png.

Done

"Schedule New Appointment"
You may notice a button on the dashboard that seems intended for online scheduling. Unfortunately, Four Points manages scheduling only via live individuals and this button is not functional.

ⓘ **Online Scheduling Unavailable**

To schedule an appointment, please contact your therapist.
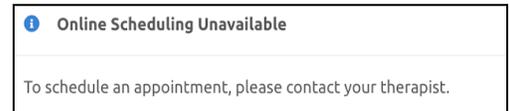
For questions, reach out anytime. Our team is eager to help.
(970) 682-1337 / info@fourpointscc.com