

## Complete Demographic Info

- Name, Address, Date of Birth, & Gender are required
  - Use the information on file with your insurance company
- If your name/pronouns are different from your legal name/gender:
  - Tell your therapist your Preferred Name, Gender Identity, & Pronouns
  - They can add this information to your chart
- Click **Save Demographic Info**

## Complete Insurance & Billing

- Your therapist may have already completed this section
- Click on **Add Insurance** to add insurance information
  - If you do not see your insurance or are unsure, leave blank
  - Use the "State ID" number if your card has this on it
  - Information for policyholder is required
- Save credit card information for future payments (optional)
- Click **Save Changes**

## New Client Intake Forms

- Read & Sign Intake Forms
  - Clients 14 & older must sign
  - Parent/guardian must sign for clients 13 & younger
- All boxes must be checked for Acknowledgments
- Remember to click the blue **Sign and Submit** button at the bottom