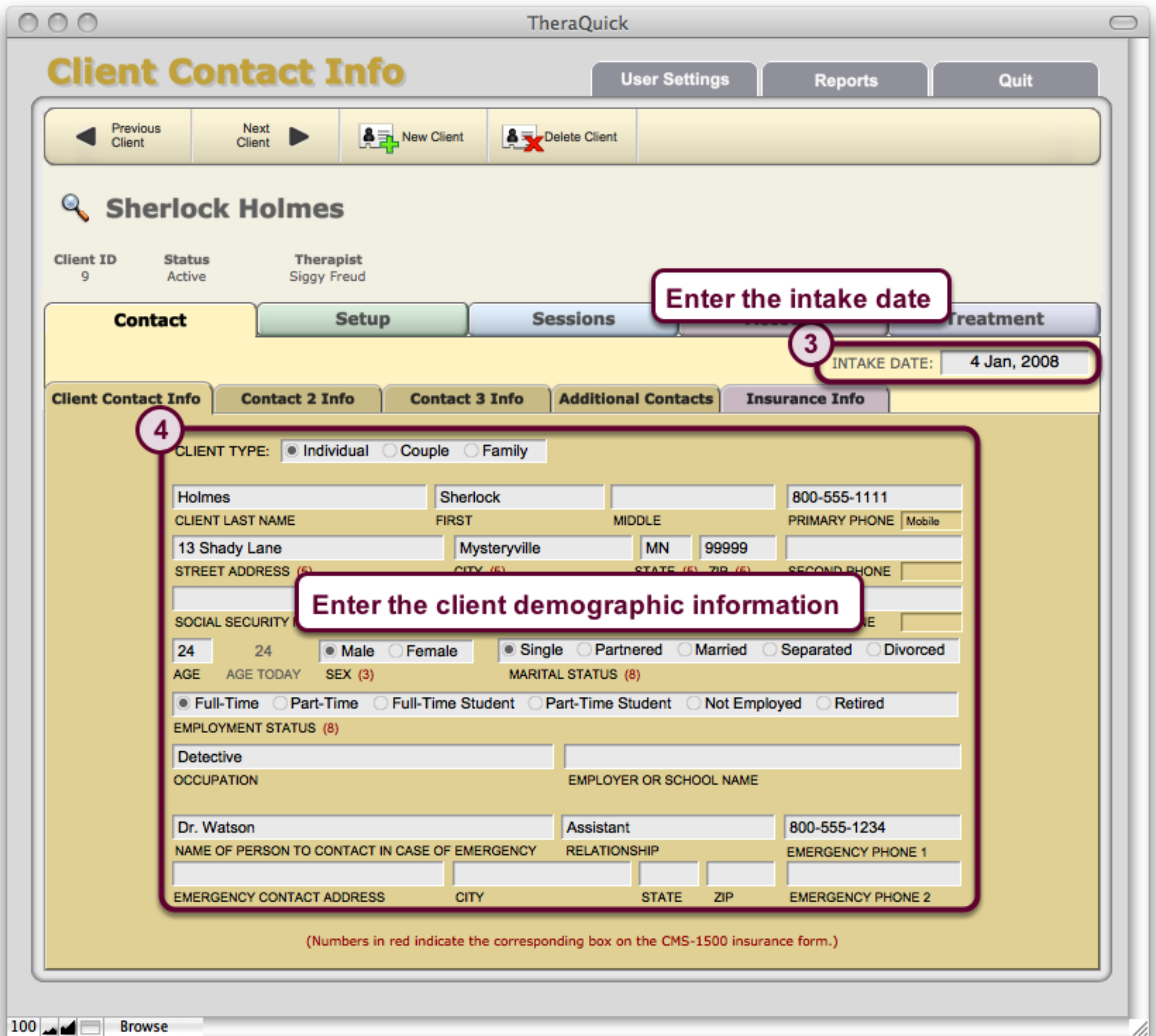
Creating a New Client

How to add a new client in TheraQuick, and setup the basic client information.

(1) Navigate to the Client Activity > Contact tab. (2) Then click on the "New Client" button in the functions toolbar.

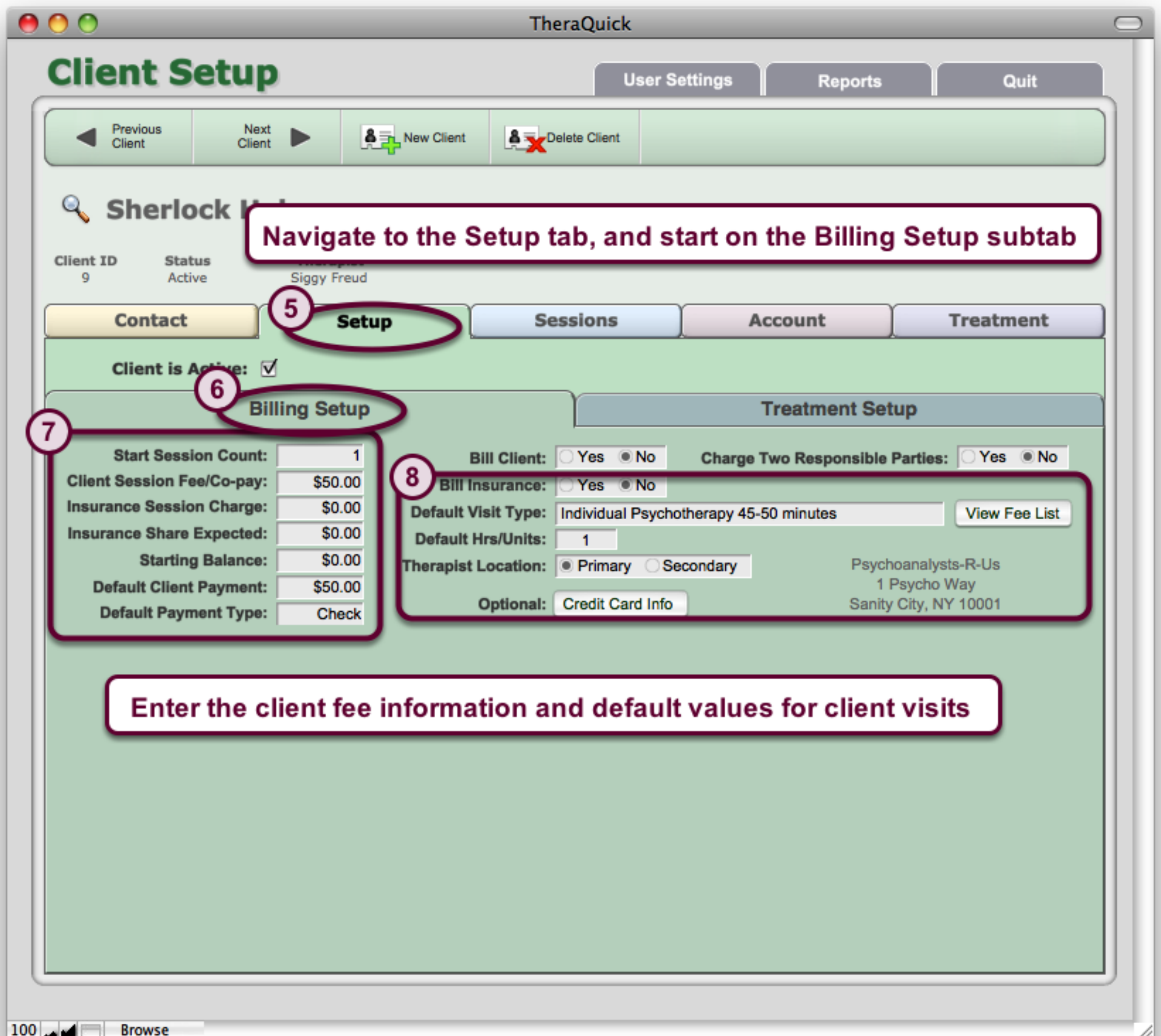
A new, blank record will appear.

(3) Enter the client intake date and (4) demographic information.



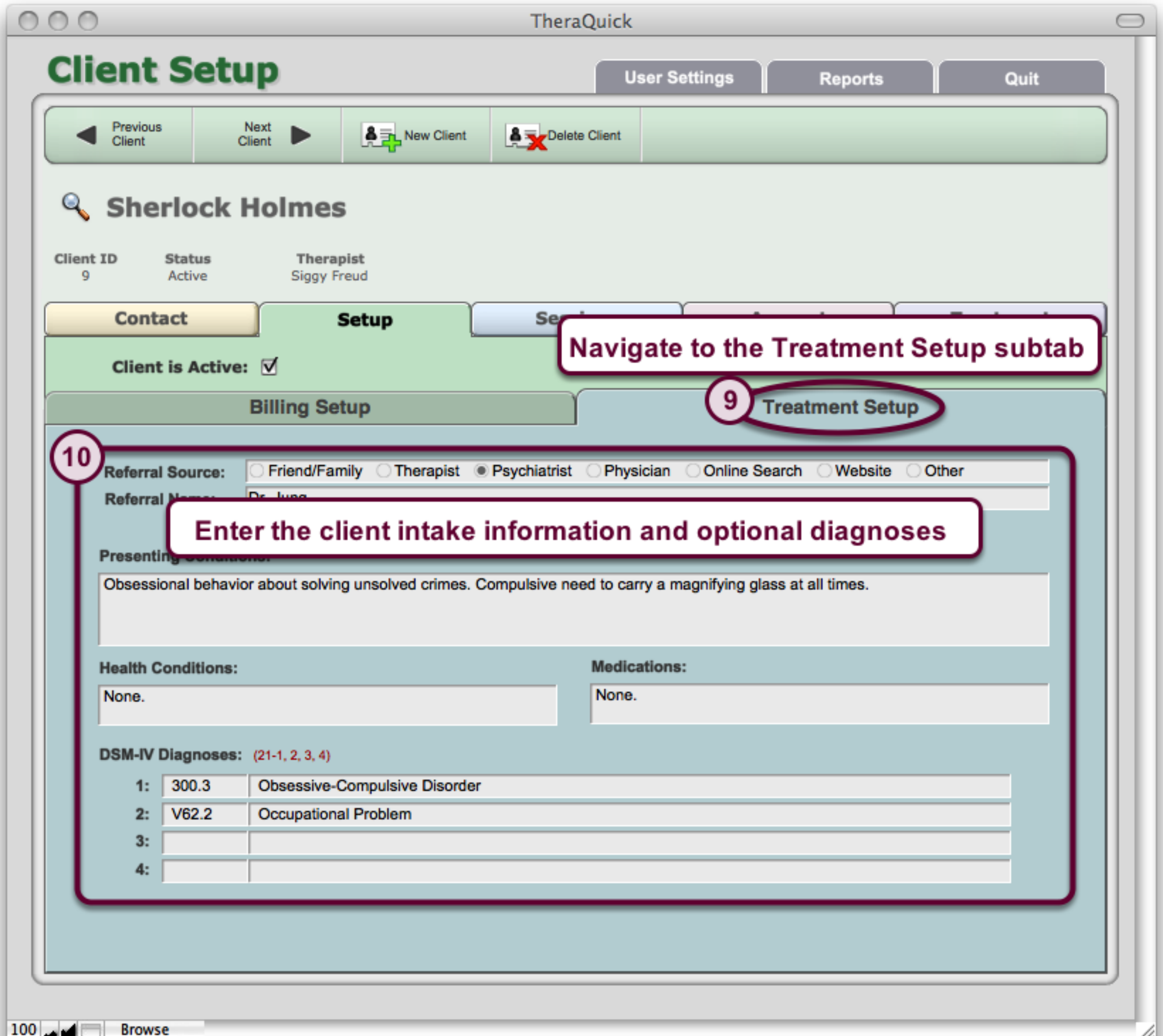
Fields with a red number in parentheses are used on insurance claims. These fields must have values entered if you will be creating insurance claims for this client.

(5) Navigate to the Client Activity > Setup tab, and the (6) Billing Setup subtab. (7) Enter client billing information and (8) default visit information.



Enter values for the session fees (for the client and insurance, if necessary). Enter default (usual) values for the client payment, payment type, and visit type. In this example, the client will be paying $50 per session and the therapist will not be expecting payment from an insurance company. The client will usually pay the full amount by check for each session. Each session will be a typical 45-50 minute visit for individual psychotherapy.

(9) Navigate to the Treatment Setup subtab. (10) Enter client treatment and diagnosis information.



Enter any intake information and initial diagnoses, if you wish. (Diagnoses are required if you are creating insurance claims for this client.) You can now proceed with creating sessions for this client.