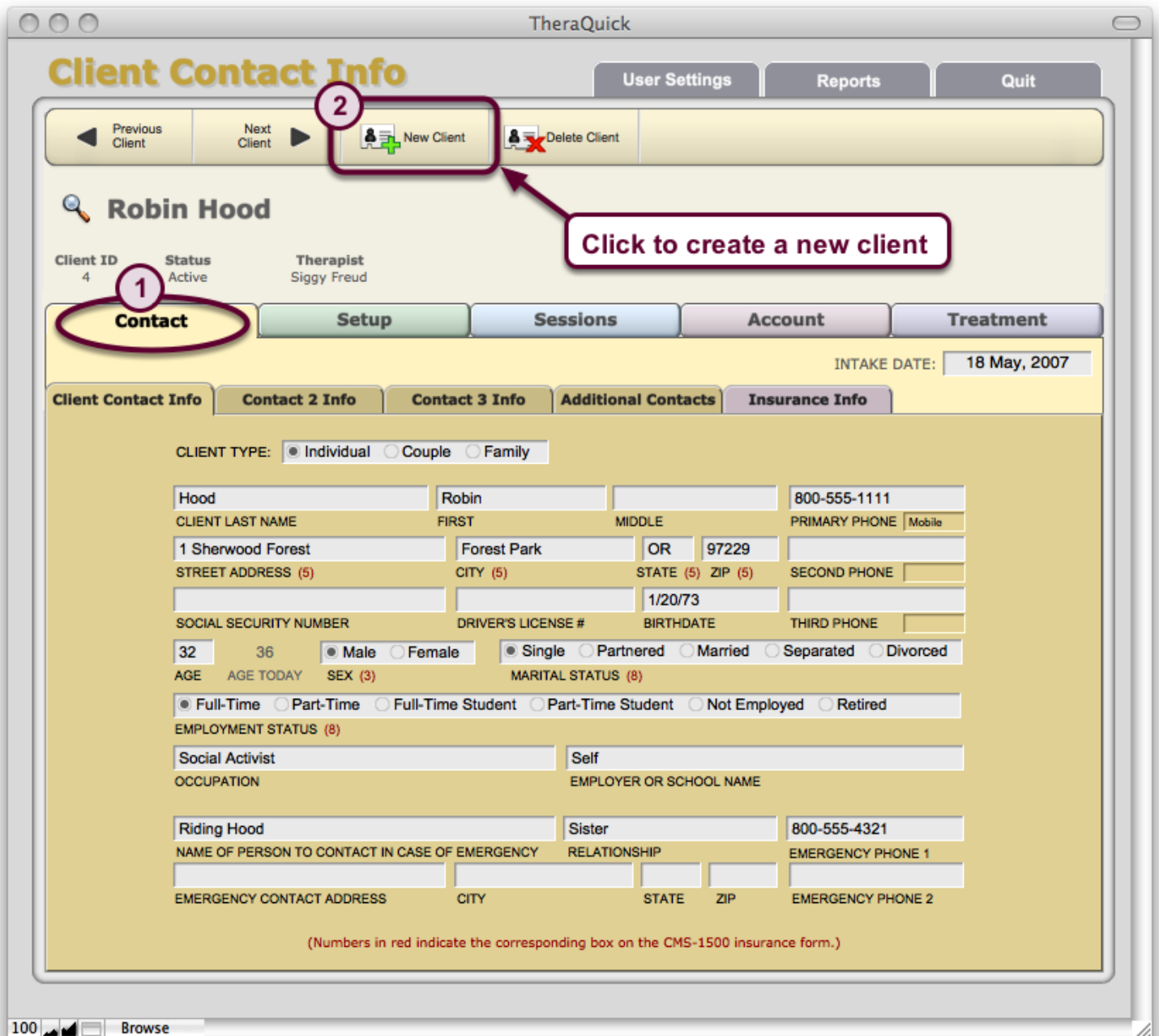


# Creating a New Client

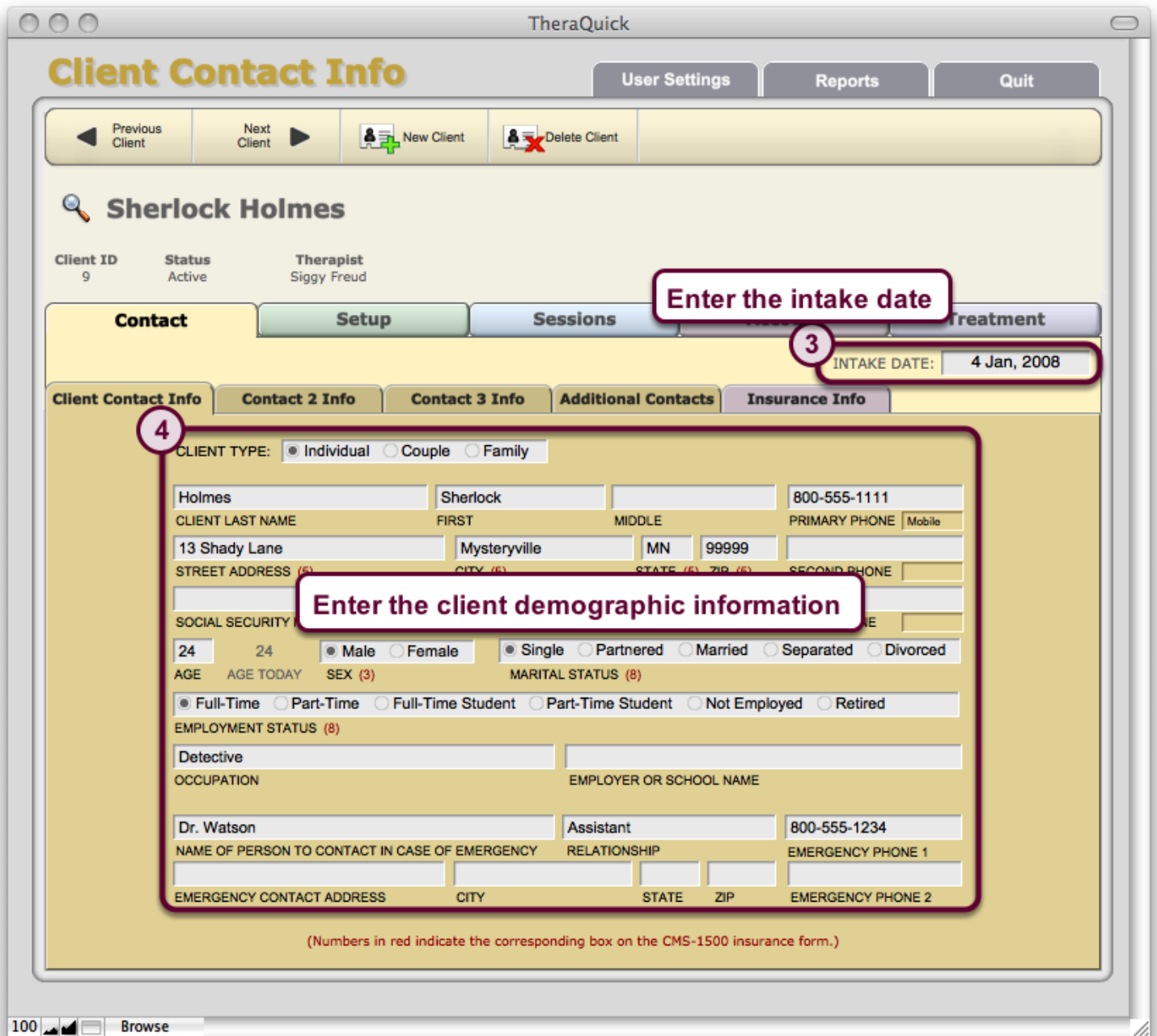
How to add a new client in TheraQuick, and setup the basic client information.

**(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.**



**Client Contact Info**

Client ID: 9 | Status: Active | Therapist: Siggie Freud

**3** Enter the intake date

INTAKE DATE: 4 Jan, 2008

**4** Enter the client demographic information

CLIENT TYPE:  Individual  Couple  Family

Holmes Sherlock 800-555-1111  
CLIENT LAST NAME FIRST MIDDLE PRIMARY PHONE | Mobile

13 Shady Lane Mysteryville MN 99999  
STREET ADDRESS (5) CITY (6) STATE (6) ZIP (6) SECOND PHONE

SOCIAL SECURITY [redacted] [redacted] [redacted]  
SOCIAL SECURITY NUMBER (9)

24 24  Male  Female  Single  Partnered  Married  Separated  Divorced  
AGE AGE TODAY SEX (3) MARITAL STATUS (8)

Full-Time  Part-Time  Full-Time Student  Part-Time Student  Not Employed  Retired  
EMPLOYMENT STATUS (8)

Detective  
OCCUPATION EMPLOYER OR SCHOOL NAME

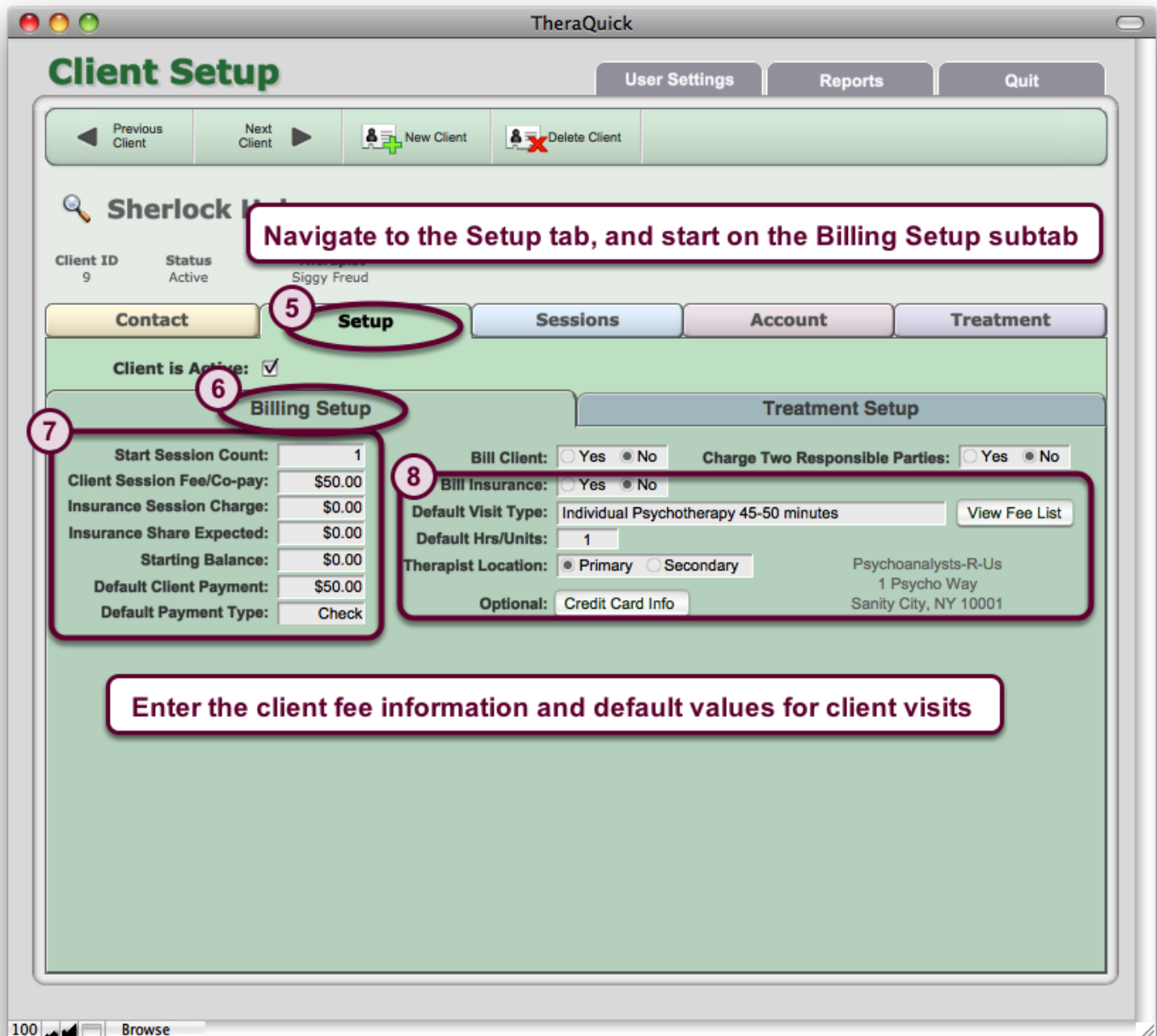
Dr. Watson Assistant 800-555-1234  
NAME OF PERSON TO CONTACT IN CASE OF EMERGENCY RELATIONSHIP EMERGENCY PHONE 1

[redacted] [redacted] [redacted] [redacted] [redacted]  
EMERGENCY CONTACT ADDRESS CITY STATE ZIP EMERGENCY PHONE 2

(Numbers in red indicate the corresponding box on the CMS-1500 insurance form.)

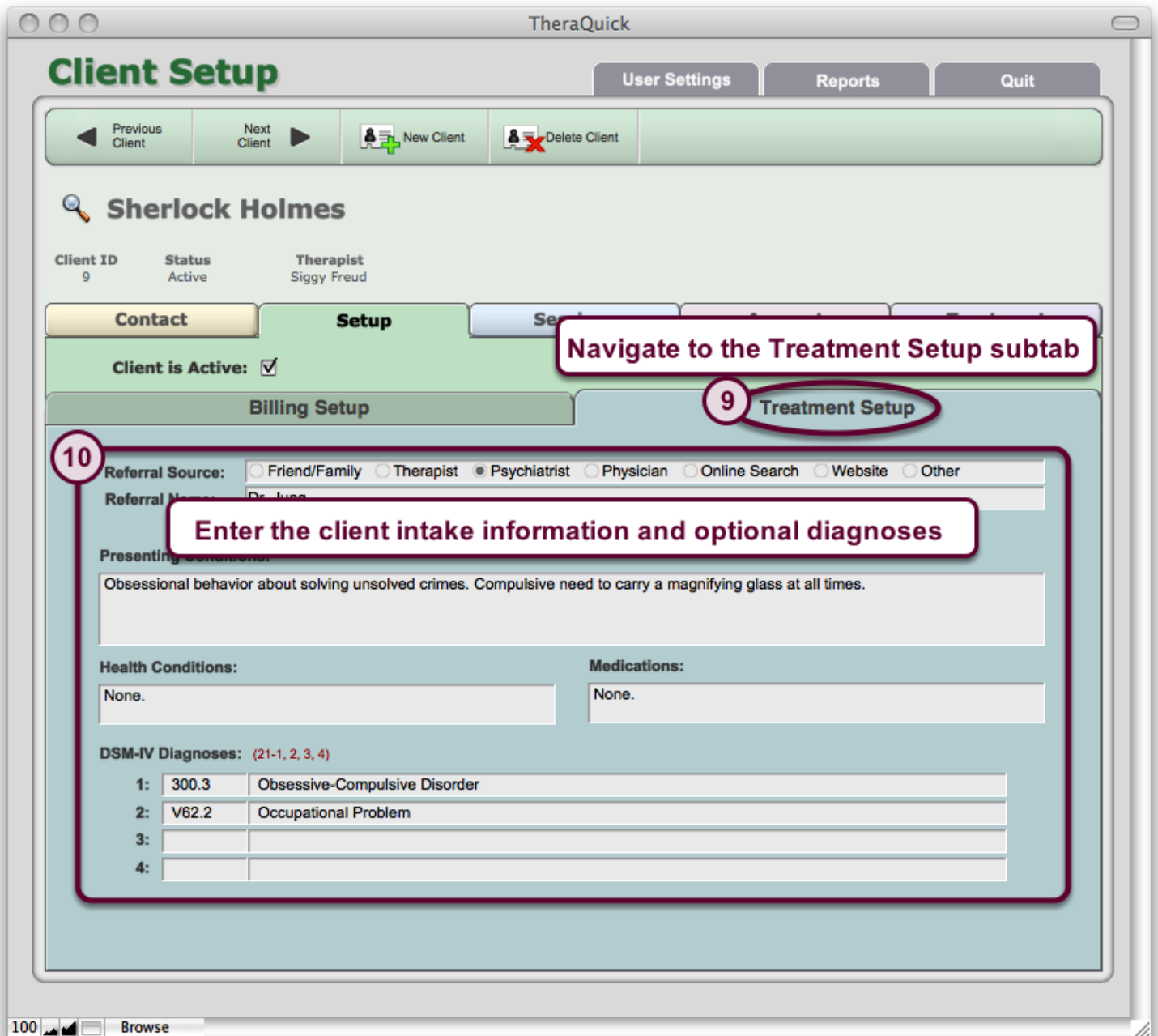
Fields with a red number in parentheses are used on insurance claims. These fields must have values entered if you will be creating insurance claims for this client.

(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.



**Client Setup**

Client ID: 9 | Status: Active | Therapist: Siggy Freud

**Setup** | **Treatment Setup**

Client is Active:

**Referral Source:**  Friend/Family  Therapist  Psychiatrist  Physician  Online Search  Website  Other

**Referral Name:** Dr. Jung

**Presenting Comments:**  
Obsessional behavior about solving unsolved crimes. Compulsive need to carry a magnifying glass at all times.

**Health Conditions:** None.

**Medications:** None.

**DSM-IV Diagnoses:** (21-1, 2, 3, 4)

1:	300.3	Obsessive-Compulsive Disorder
2:	V62.2	Occupational Problem
3:		
4:		

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.