

## PATIENT REGISTRATION



- |  |   |
|--|---|
| <input type="checkbox"/> New Client          | <input type="checkbox"/> Payment Contract       |
| <input type="checkbox"/> Returning Client    | <input type="checkbox"/> Consents Created       |
| <input type="checkbox"/> Added/Updated in CR | <input type="checkbox"/> Intake Scheduled _____ |
| <input type="checkbox"/> Eligibility         | <input type="checkbox"/> Consents Sent _____    |
| <input type="checkbox"/> VOB                 | <input type="checkbox"/> Chart # _____          |

**\*All fields must be filled out or marked NA as appropriate. \***

Date: \_\_\_\_\_

What services are you requesting an appointment for? (check all that apply)

- |                                  |  |   |
|----------------------------------|--|---|
| <input type="checkbox"/> testing | <input type="checkbox"/> NFB                   | <input type="checkbox"/> update information |
| <input type="checkbox"/> therapy | <input type="checkbox"/> LHI                   | <input type="checkbox"/> other _____        |
| <input type="checkbox"/> EMDR    | <input type="checkbox"/> medication management |   |

If client is a minor, both parents must provide consent for services or proof of sole decision-making rights. Parental consent from both parents or proof of sole decision-making rights **must be received PRIOR to intake or the appointment will be rescheduled.**

Client is:

- an adult.
- child lives with both parents; both parents can sign the Permission for Services.
- parents share joint parenting rights and responsibilities; *both parents can sign the Permission for Services or Consent for Treatment of Minors When Parents Share Custody can be used.*
- one parent/guardian has sole parenting rights and responsibilities; *parent must provide proof PRIOR to intake or the appointment will be rescheduled.*
- other parent is deceased.
- DCYF has guardianship.
- other: \_\_\_\_\_

**Patient Information**

First name: \_\_\_\_\_ MI: \_\_\_\_\_ Last name: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Gender: \_\_\_\_\_ Marital status: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_

Cell phone: \_\_\_\_\_ Email: \_\_\_\_\_

Does the patient have any of the following? (check all that apply, and instruct to bring copies for file to intake)

- |   |   |
|---|---|
| <input type="checkbox"/> insurance cards (we will take copies of all insurance cards) | <input type="checkbox"/> past/current medication list |
| <input type="checkbox"/> previous testing   | <input type="checkbox"/> IEP                          |
|   | <input type="checkbox"/> 504                          |

**Guarantor (Person Financially Responsible for Payment)/Parent or Guardian 1**

First name: \_\_\_\_\_ MI: \_\_\_\_\_ Last name: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Gender: \_\_\_\_\_ Marital status: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_

Cell phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Parent or Guardian 2/Emergency Contact**

First name: \_\_\_\_\_ MI: \_\_\_\_\_ Last name: \_\_\_\_\_  
 Date of birth: \_\_\_\_\_ Gender: \_\_\_\_\_ Marital status: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_  
 Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_  
 Cell phone: \_\_\_\_\_ Email: \_\_\_\_\_

**\* All insurance fields must be filled in BEFORE Verification of Benefits can be completed. \***

**Primary Insurance Information**

Insurance co.: \_\_\_\_\_ Plan name: \_\_\_\_\_  
 Member ID: \_\_\_\_\_ Group #: \_\_\_\_\_  
 Insurance phone: \_\_\_\_\_  
 Subscriber first: \_\_\_\_\_ MI: \_\_\_\_\_ Last: \_\_\_\_\_  
 DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_  
 Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_  
 Cell phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Secondary Insurance Information**

Insurance co.: \_\_\_\_\_ Plan name: \_\_\_\_\_  
 Member ID: \_\_\_\_\_ Group #: \_\_\_\_\_  
 Insurance phone: \_\_\_\_\_  
 Subscriber first: \_\_\_\_\_ MI: \_\_\_\_\_ Last: \_\_\_\_\_  
 DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_  
 Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_  
 Cell phone: \_\_\_\_\_ Email: \_\_\_\_\_

Client has Well Sense insurance?    yes    no    **\*If yes, an initial auth. must be added to the client profile in CR after VOB.**

**Next Steps**

Review the next steps with client/guardian:

- verification of insurance benefits will be completed
- Welcome Packet with required consents and acknowledgements will be sent:
  - Email to: \_\_\_\_\_
  - Mail to: \_\_\_\_\_
- intake appointment will be schedule AFTER all signed consents are received.