

New Client Procedures

BEFORE FIRST SESSION

Access the client's paperwork. Look over it to note the client's demographic information, purpose for coming in, symptoms, and desire (or lack thereof) of spiritual integration. Fill out parts of your intake form that you can.

AFTER FIRST SESSION

TheraNest Related Tasks

- Enter their next appointment into the TheraNest calendar (if you haven't already).
- *Enter the referral source into the client details section!*
- Let Michelle D. know if they would like to receive our newsletter.
- Check their Consent for Communication form and note any types of communication that they **do not** give consent for. Check the relevant boxes on the client details page
- If the client does not want you to email receipts from TheraNest, make note of it in such a way that you are reminded not to do so.
- Invoice the client and accept payment.
- At the second session – check to see if they received the emailed invoice.
- For adolescents w/ email & phone #, enter their information on main screen and parents information under “Manage Household Info” at bottom of screen.

Paperwork Related Tasks

- Complete your intake form (as necessary).
- Make a progress note in TheraNest that says: “See paper notes” or “See initial assessment” (if you used the TheraNest format).

Thank the Referral Source

- Take a moment to write a thank you to the person that referred the client. (Be sure not to mention the clients' name.) This goes a long way in maintaining a relationship with our referral sources.
- The thank you notes and stamps are in the work room.