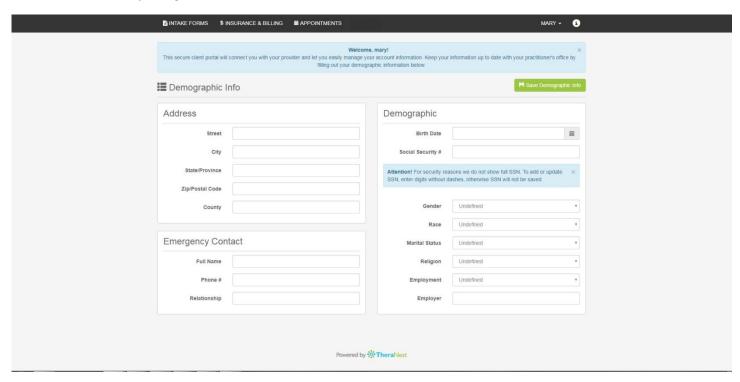
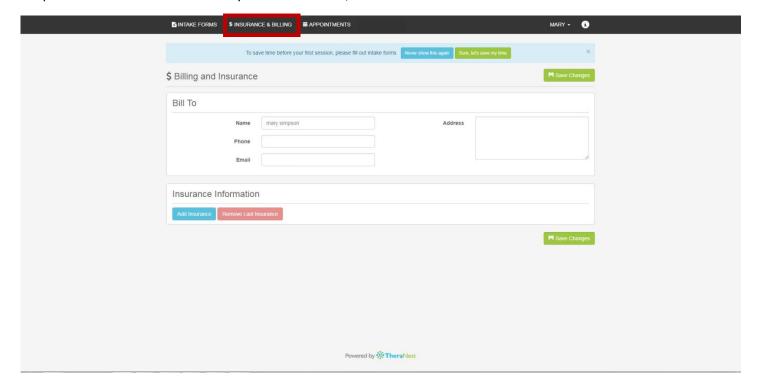
### **Demographics**

When logging in for the first time you are either directed to the intake forms or the demographics page. Please note the green 'Save' buttons on each screen. When entering new information, save your changes regularly, certainly save before clicking a new link or your input will not be updated. When the 'Save' button is clicked the page will not refresh it will just signal that it saved.



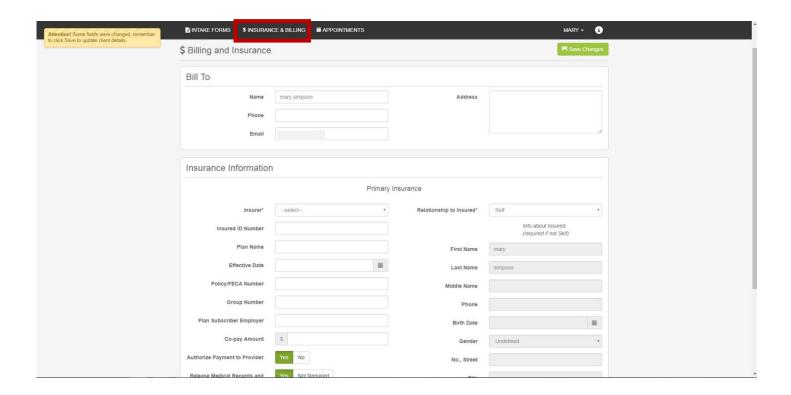
### **Insurance & Billing**

Choosing 'Insurance & Billing' from the top menu brings you to this screen. Enter the BIll To info for the responsible person. If the client is covered by health insurance, click the blue "Add Insurance" button at the bottom left.



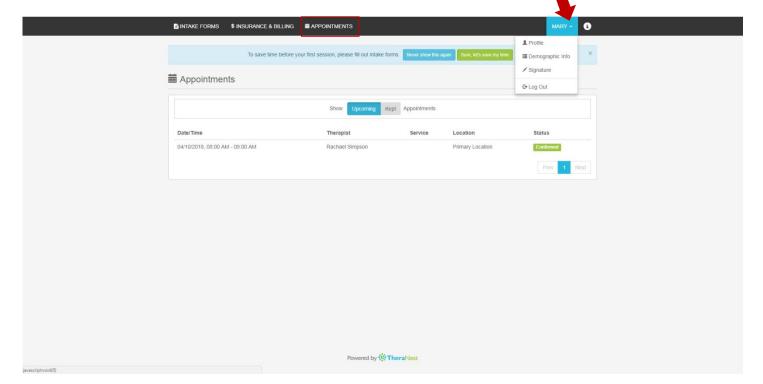
#### **Add Insurance and Secondary Insurance**

Once you click the Add Insurance button your screen will now appear like this and you can enter Primary Insurance and if there is secondary insurance coverage, save your changes for the primary and click add secondary insurance and fill in that information.



# **Appointments**

There is a dropdown menu attached to the client's name at the top right of the screen. Here you can find the Profile, Demographic Info, Signature and Log Out. The client's name and basic info can be edited using the profile screen shown next.



# **Profile**

The profile screen contains only the first and last name, email address, and the phone number.

