

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.

The screenshot shows the 'Demographic Info' page. At the top, there is a navigation bar with 'INTAKE FORMS', 'INSURANCE & BILLING', and 'APPOINTMENTS'. A user profile 'MARY' is visible in the top right. A welcome message reads: 'Welcome, mary! This secure client portal will connect you with your provider and let you easily manage your account information. Keep your information up to date with your practitioner's office by filling out your demographic information below.' Below this is a 'Save Demographic Info' button. The main content area is divided into three sections: 'Address' (with fields for Street, City, State/Province, Zip/Postal Code, and County), 'Emergency Contact' (with fields for Full Name, Phone #, and Relationship), and 'Demographic' (with fields for Birth Date, Social Security #, Gender, Race, Marital Status, Religion, Employment, and Employer). A blue warning box states: 'Attention! For security reasons we do not show full SSN. To add or update SSN, enter digits without dashes, otherwise SSN will not be saved.' At the bottom, it says 'Powered by TheraNest'.

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.

The screenshot shows the 'Billing and Insurance' page. The navigation bar is the same as in the previous screenshot, but 'INSURANCE & BILLING' is highlighted with a red box. A message at the top says: 'To save time before your first session, please fill out intake forms.' with buttons for 'Never show this again' and 'Sure, let's save my time'. Below this is a 'Save Changes' button. The main content area is divided into two sections: 'Bill To' (with fields for Name, Address, Phone, and Email) and 'Insurance Information' (with buttons for 'Add Insurance' and 'Remove Last Insurance'). A 'Save Changes' button is located at the bottom right. At the bottom, it says 'Powered by TheraNest'.

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.

Attention! Some fields were changed, remember to click Save to update client details.

INTAKE FORMS **INSURANCE & BILLING** APPOINTMENTS MARY

\$ Billing and Insurance Save Changes

Bill To

Name: mary simpson Address: [Empty]

Phone: [Empty]

Email: [Empty]

Insurance Information

Primary Insurance

Insurer: --select-- Relationship to Insured: Self

Insured ID Number: [Empty]

Plan Name: [Empty]

Effective Date: [Empty]

Policy/FECA Number: [Empty]

Group Number: [Empty]

Plan Subscriber Employer: [Empty]

Co-pay Amount: \$ [Empty]

Authorize Payment to Provider: Yes No

Release Medical Records and: Yes Not Required

Info about Insured: (required if not Self)

First Name: mary

Last Name: simpson

Middle Name: [Empty]

Phone: [Empty]

Birth Date: [Empty]

Gender: Undefined

No. Street: [Empty]

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.

INTAKE FORMS INSURANCE & BILLING **APPOINTMENTS** MARY

To save time before your first session, please fill out intake forms. Never show this again Sure, let's save my time

Appointments

Show: Upcoming Kept Appointments

Date/Time	Therapist	Service	Location	Status
04/10/2018, 08:00 AM - 09:00 AM	Rachael Simpson		Primary Location	Confirmed

Prev 1 Next

Profile

Demographic Info

Signature

Log Out

Powered by TheraNest

javascriptvoid()

Profile

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

