Intake Checklist

Documentation

- Completed entire intake packet, including signature pages, and copy of front/back of insurance card
- Filled out the Release of Information page for anyone that I want my clinician to speak with, including primary care physician, employer, etc.
- If wanting therapist to review an IEP or psychological assessment, please have that dropped off or sent to the office in advance
- Child-specific: If separation/divorce, both signatures on file
- Child-specific: If separation/divorce, custody paperwork must be on file
- Couples-specific: Both partners have signed informed consent

Financials

- If someone else is paying for services, a Release of Information (billing specifically) is on file
- Filled out form confirming paying out of pocket or billing 3rd party insurance
- Filled out the financial responsiblity form
- Add a credit card on file whether out of pocket or using commerical insurance
- If paying out of pocket, review the Good Faith Estimate that your clinician will provide to you before the first appointment
- Child-specific: If separation/divorce, confirm who will be the primary caregiver to make payments

Electronic Health Record

- Activate your client portal
- Confirm demographic information
- Check client portal messages for Good Faith Estimate or other important documents
- Send any questions you may have about client portal to your therapist through the client portal

Confirm the following information

- Time of appointment
- Location of appointment
  - Saint Charles: 2081 location
  - Saint Charles: 2121 location
  - Olivette
  - In-Home
  - Virtual
- Fee for appointment
- Who will be attending the appointment

ADDITIONAL NOTES:

Waiting rooms are closed. Please wait in car or outside suite until scheduled appointment time.