SOLUTIONS BEHAVIORAL HEALTH

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 responsibility form
- Add a credit card on file whether out of pocket or using commercial 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
- Fee for appointment
- Who will be attending the appointment

Additional Notes:

Waiting rooms are closed. Please wait in your car or outside until scheduled appointment time. For In-person sessions, mask must be worn in the bulding and in sessions.

Contact Information:

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