

INSTRUCTIONS FOR NEW CLIENT PAPERWORK

Updated: 8/14/11

Hello and Welcome. Please read the instructions below to print and fill out your paperwork prior to arriving for your appointment.

Go to www.DrEricksonTherapist.com and **LOG IN** with **USER NAME: MYDOCUMENTS**, and the **PASSWORD** provided: _____ . Then **PRINT OUT** the following documents:

- 1) **2 Informed Consent** Forms (1 to sign and 1 to keep for your records)
- 2) **1 Adult Personal Data Inventory** Form **per adult**
- 3) **1 Child/Adolescent Personal Data Inventory** Form **per child/adolescent under 18**
- 4) **1 Health Insurance Claim Form** CMS-1500 **per client**
- 5) **1 Assignment of Benefits** Form
- 6) **1 Credit Card Pre-Authorization** Form

INSTRUCTIONS

- Please **READ** the **Informed Consent** Form, then **KEEP** one copy for your records and have all adults attending therapy **SIGN** a copy to bring
-- for children attending therapy, the parent or legal guardian should sign
- Each client should **FILL OUT** a separate **Adult** or **Child/Adolescent Personal Inventory** Form (as best you can)
- If you wish to file with your insurance, **FILL OUT & SIGN** all places indicated:
 - 1) **1 Health Insurance Claim Form** for **each** adult and child/adolescent in therapy
 - 2) **1 Assignment of Benefits** Form
- If you intend now or later to make payment by Credit Card, please **FILL OUT** the **Credit Card Pre-Authorization** Form to have on file

UPON ARRIVAL FOR YOUR APPOINTMENT

- **PLEASE BRING** all filled out forms to your first appointment
- When we meet, you will also be given a copy of the **Consumer's Guide to Marriage and Family Therapy** brochure
- **PAYMENT** – Cash, Check or Credit Card accepted
 - if paying by **Check**, please write your check in advance for the amount due (if known) to "Dr. Cassandra Erickson"
 - if paying by **Credit Card**, please have your credit card ready for swiping and authorization at the end of the session

I look forward to meeting you soon and will be glad to answer any questions you may have!

Cassandra Erickson

Kindly give 24-hour notice if you need to cancel or change an appointment.