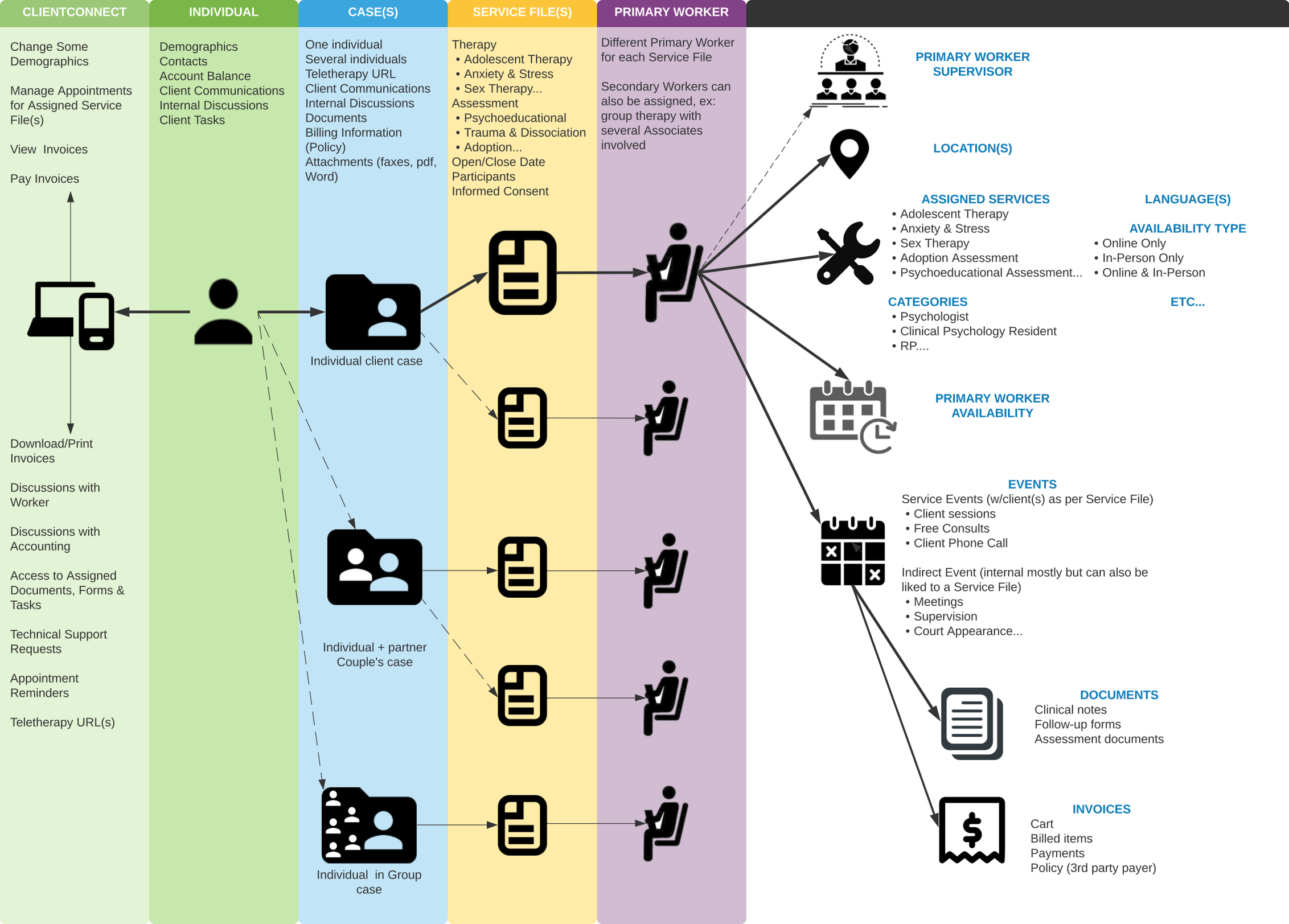
CLIENTCONNECT
INDIVIDUAL
CASE(S)
SERVICE FILE(S)
PRIMARY WORKER
Change Some Demographics
Manage Appointments for Assigned Service File(s)
View Invoices
Pay Invoices
Download/Print Invoices
Discussions with Worker
Discussions with Accounting
Access to Assigned Documents, Forms & Tasks
Technical Support Requests
Appointment Reminders
Teletherapy URL(s)
Demographics
Contacts
Account Balance
Client Communications
Internal Discussions
Client Tasks
One individual
Several individuals
Teletherapy URL
Client Communications
Internal Discussions
Documents
Billing Information (Policy)
Attachments (faxes, pdf, Word)
Individual client case
Individual + partner
Couple's case
Individual in Group case
Therapy
• Adolescent Therapy
• Anxiety & Stress
• Sex Therapy...
Assessment
• Psychoeducational
• Trauma & Dissociation
• Adoption...
Open/Close Date
Participants
Informed Consent
Different Primary Worker for each Service File
Secondary Workers can also be assigned, ex: group therapy with several Associates involved
PRIMARY WORKER SUPERVISOR
LOCATION(S)
ASSIGNED SERVICES
• Adolescent Therapy
• Anxiety & Stress
• Sex Therapy
• Adoption Assessment
• Psychoeducational Assessment...
LANGUAGE(S)
AVAILABILITY TYPE
• Online Only
• In-Person Only
• Online & In-Person
CATEGORIES
• Psychologist
• Clinical Psychology Resident
• RP....
ETC...
PRIMARY WORKER AVAILABILITY
EVENTS
Service Events (w/client(s) as per Service File)
• Client sessions
• Free Consults
• Client Phone Call
Indirect Event (internal mostly but can also be liked to a Service File)
• Meetings
• Supervision
• Court Appearance...
DOCUMENTS
Clinical notes
Follow-up forms
Assessment documents
INVOICES
Cart
Billed items
Payments
Policy (3rd party payer)