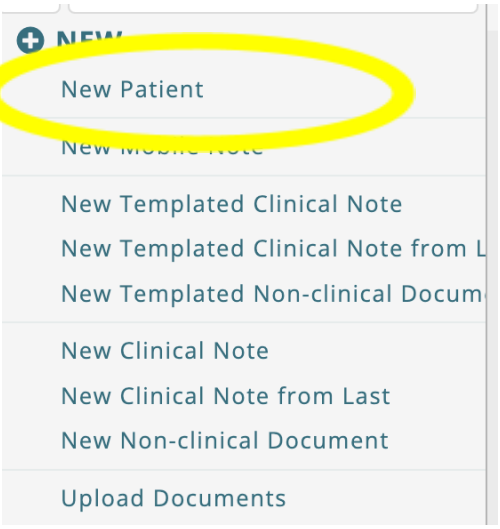
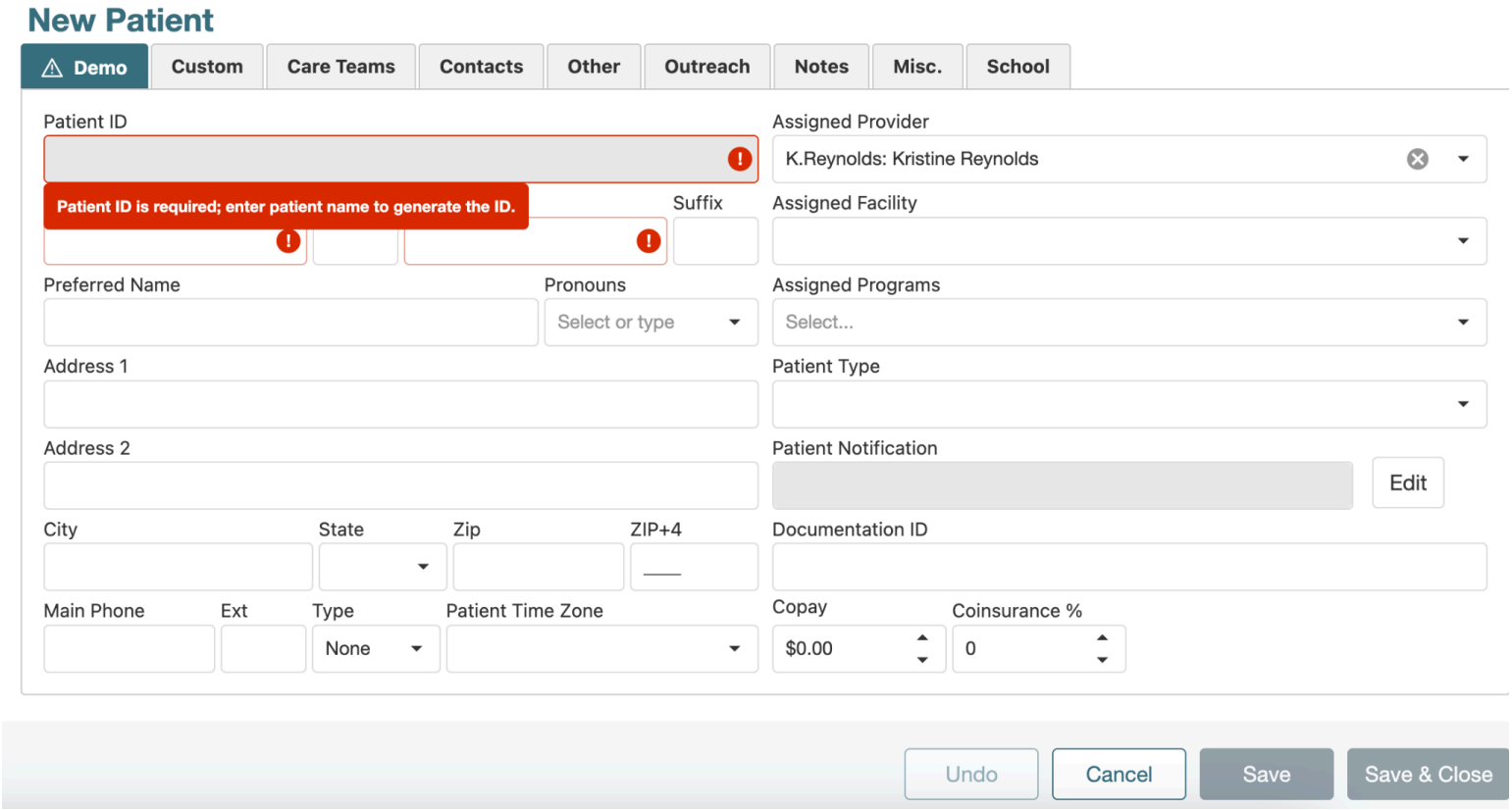
Setting up a New Client File and Sending Intake Forms to Clients

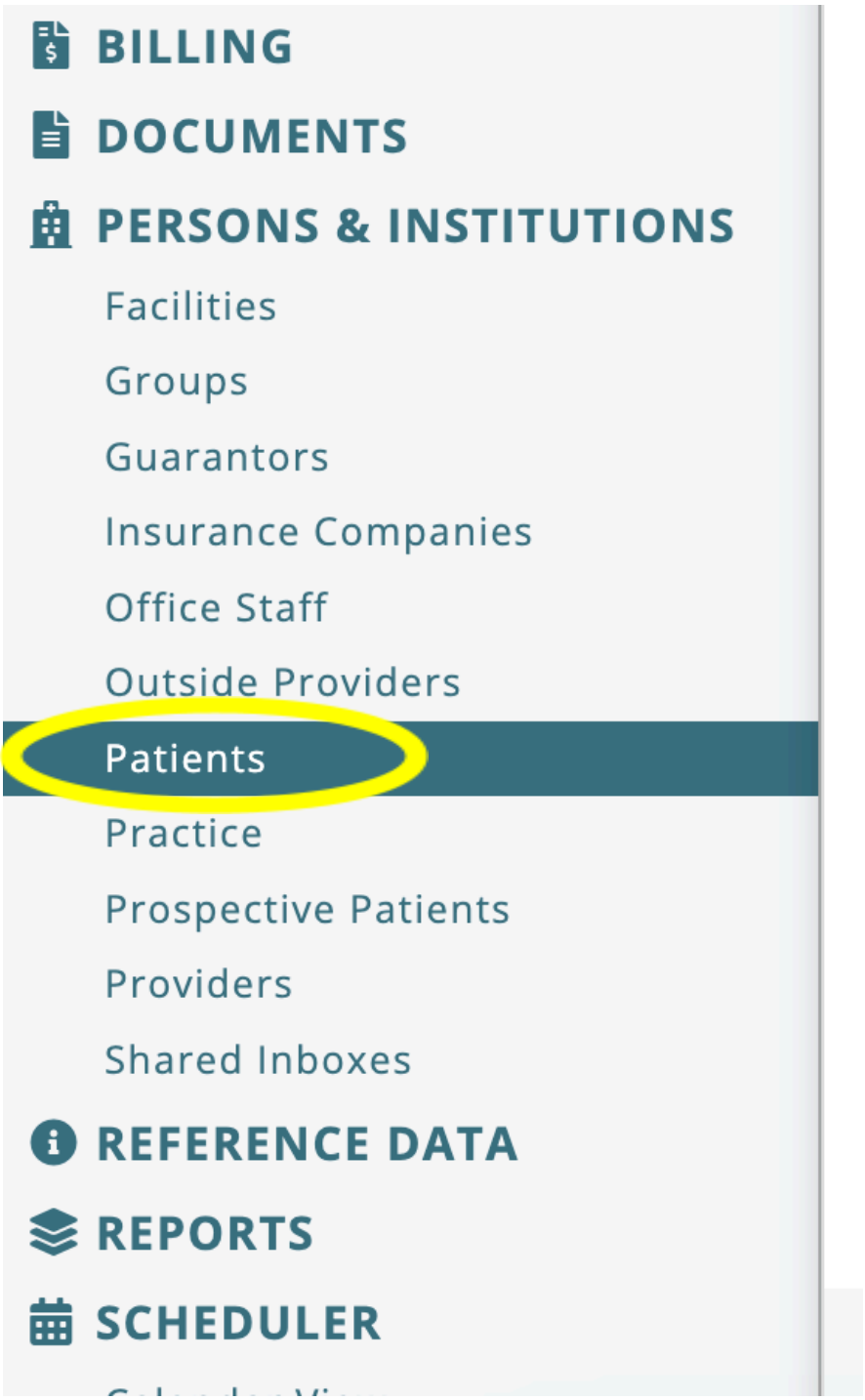
Create a new Patient



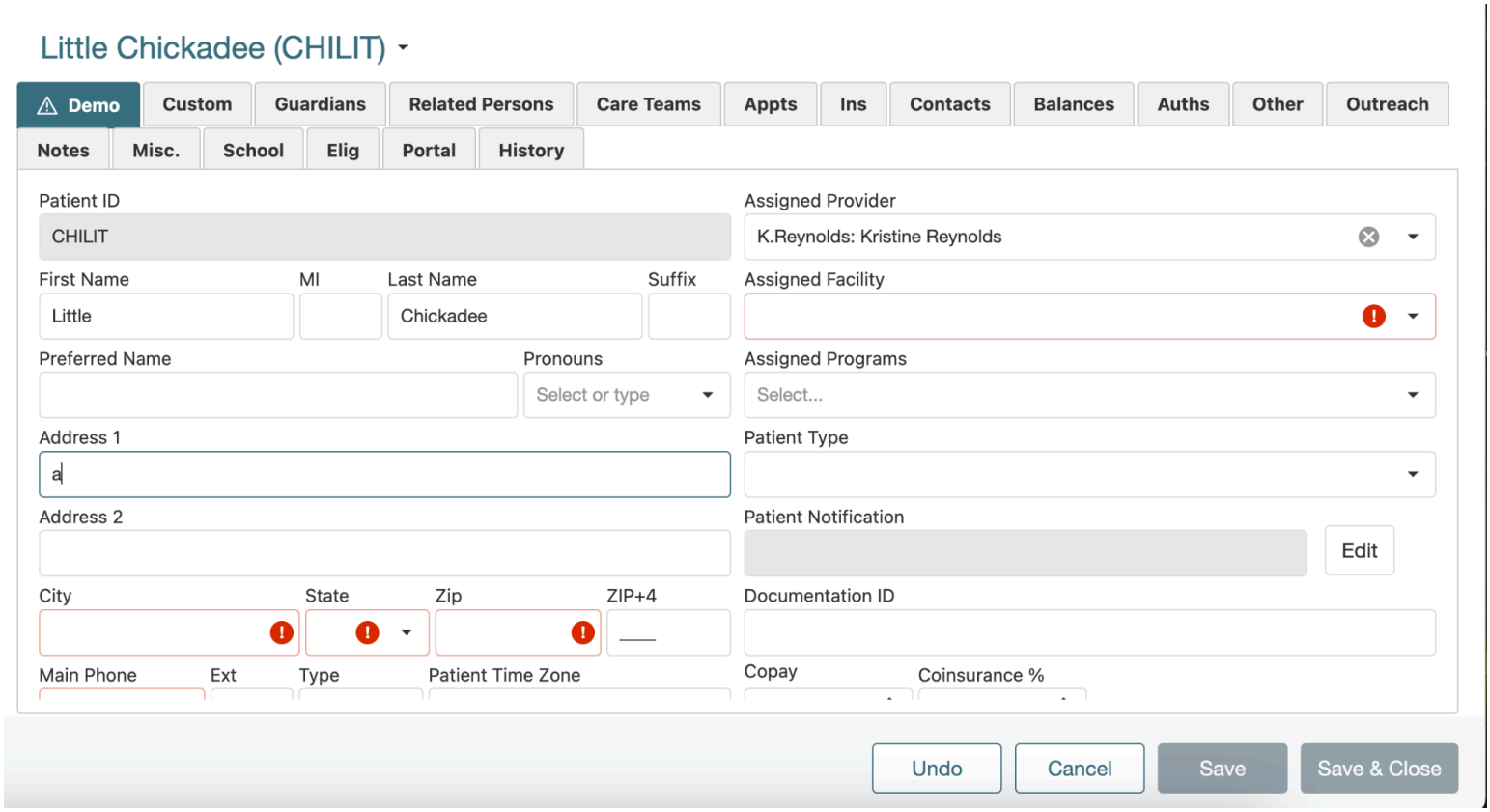
You must input the Clients Name and DOB in order for them to access the client portal/receive forms. Once you have input that information > save



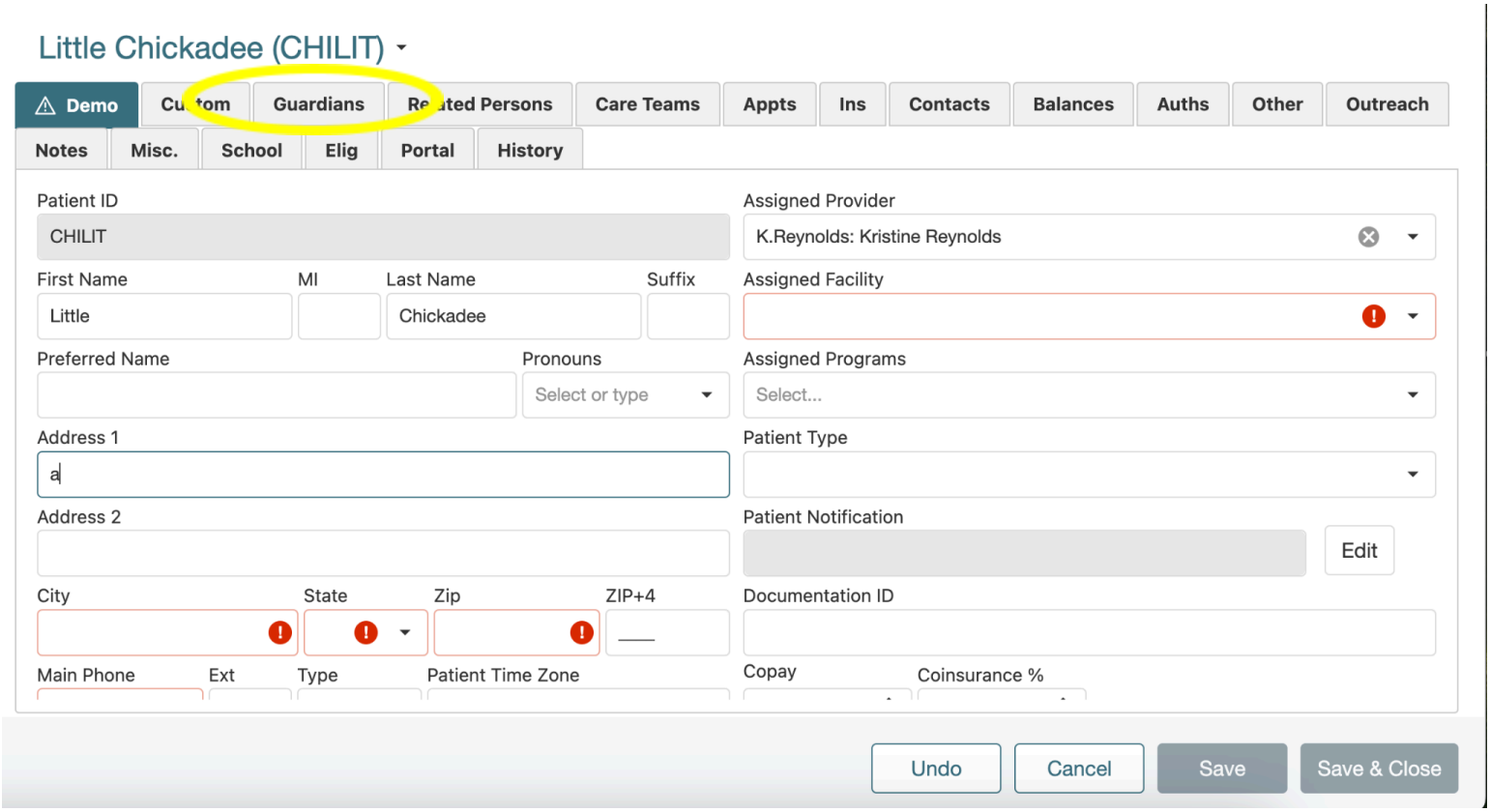
You will then be able to input more information. *If you later need to access the screen to update client demos/contact info you can find that here:*



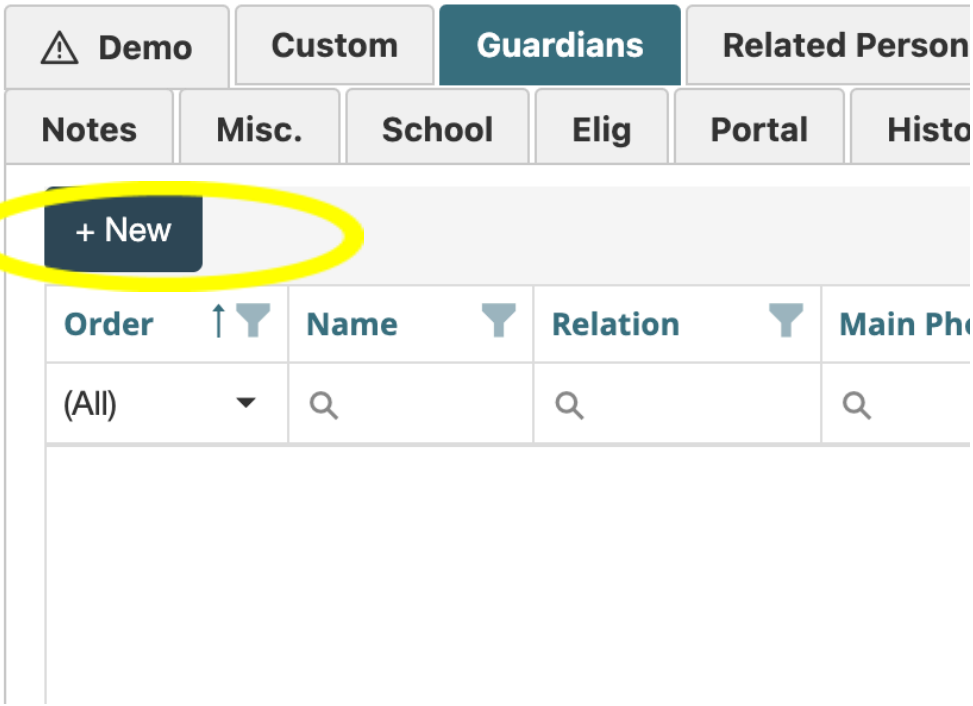
This information is located in the Patient's demographic page (NOT the client's file)



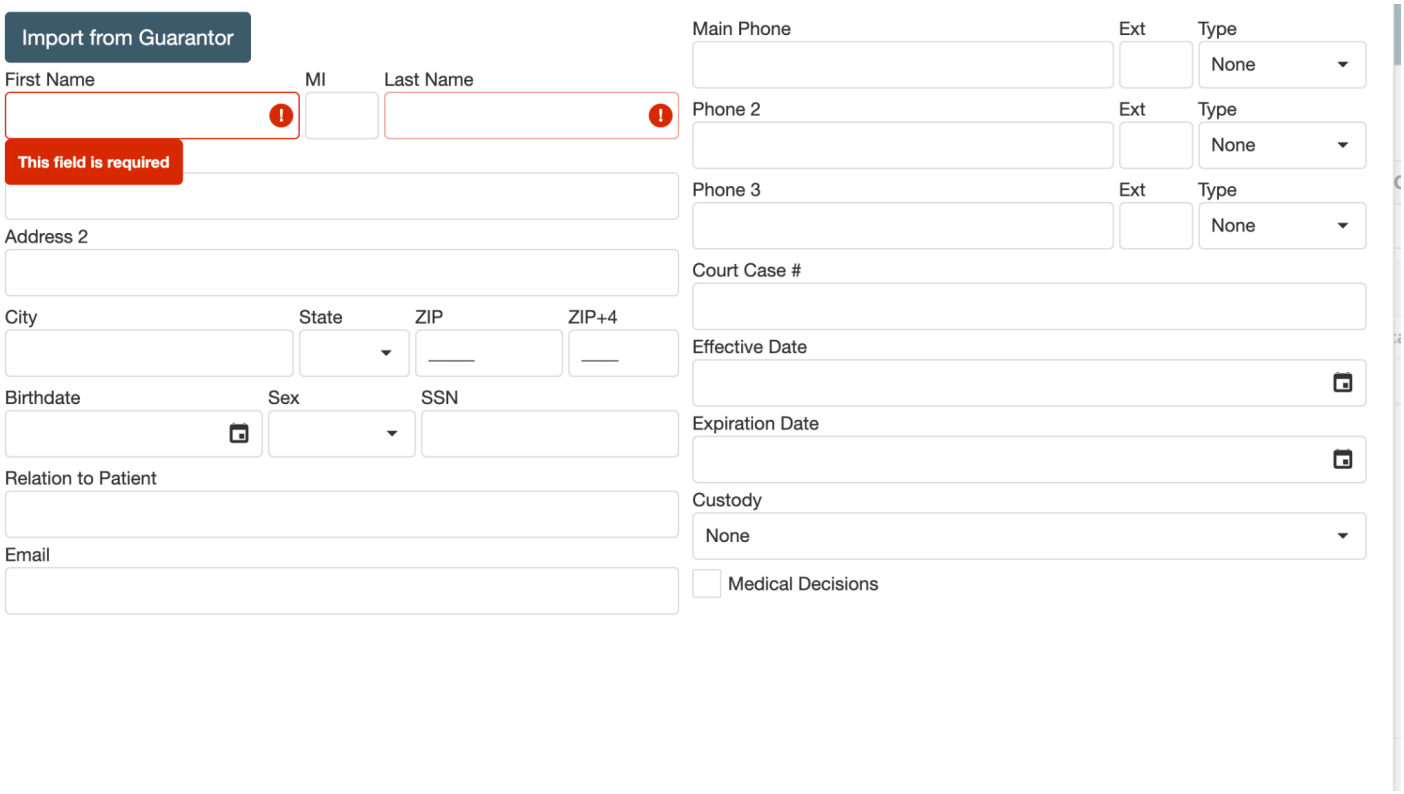
To add Guardians (you will be able to send them forms) > click Guardians



Click New

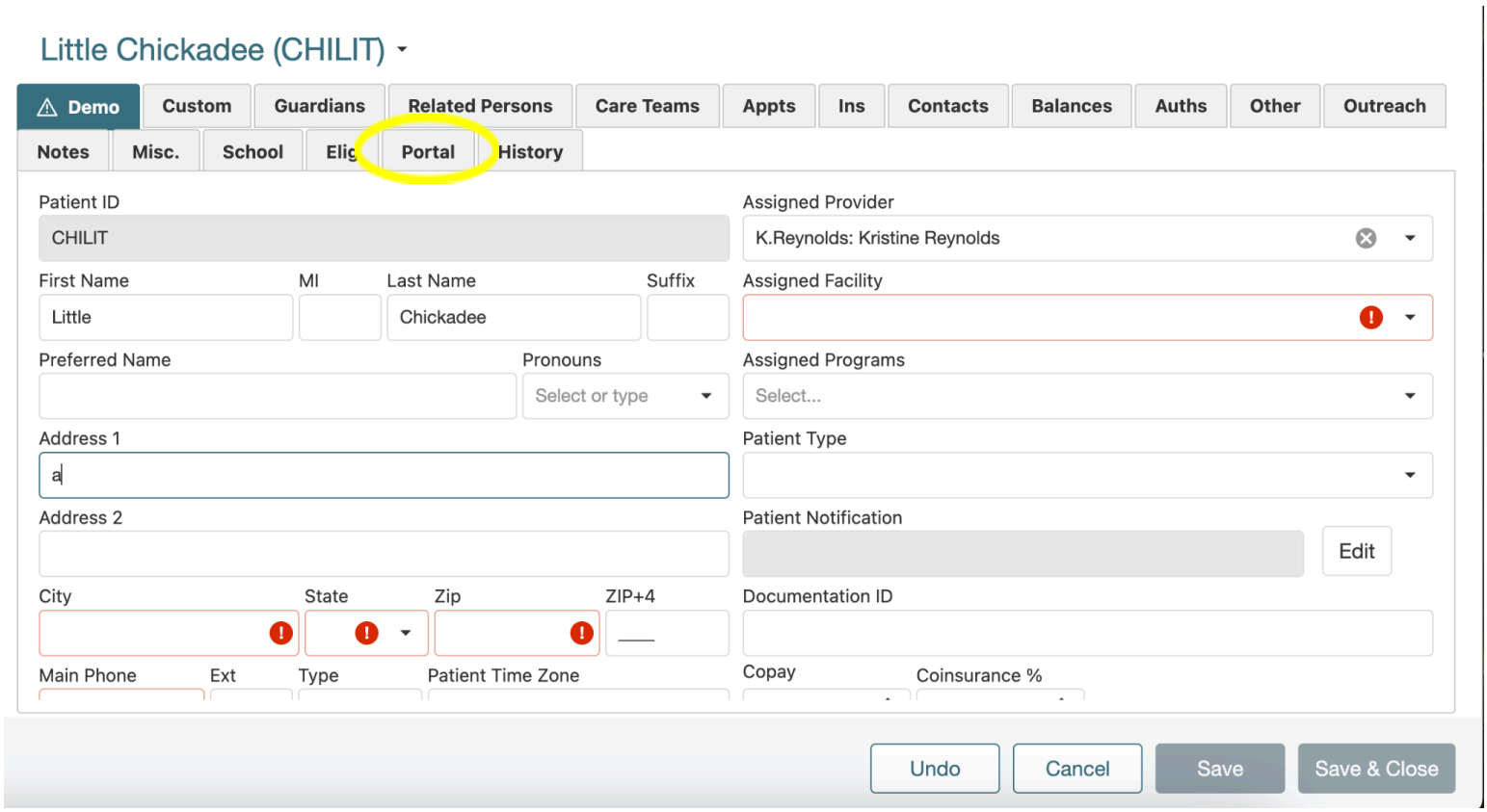


Add Guardian's information. You only need the Guardians Name, DOB, and their email to send them Forms. The DOB is their log-in info. You can also include the custody agreement/medical decisions if applicable.

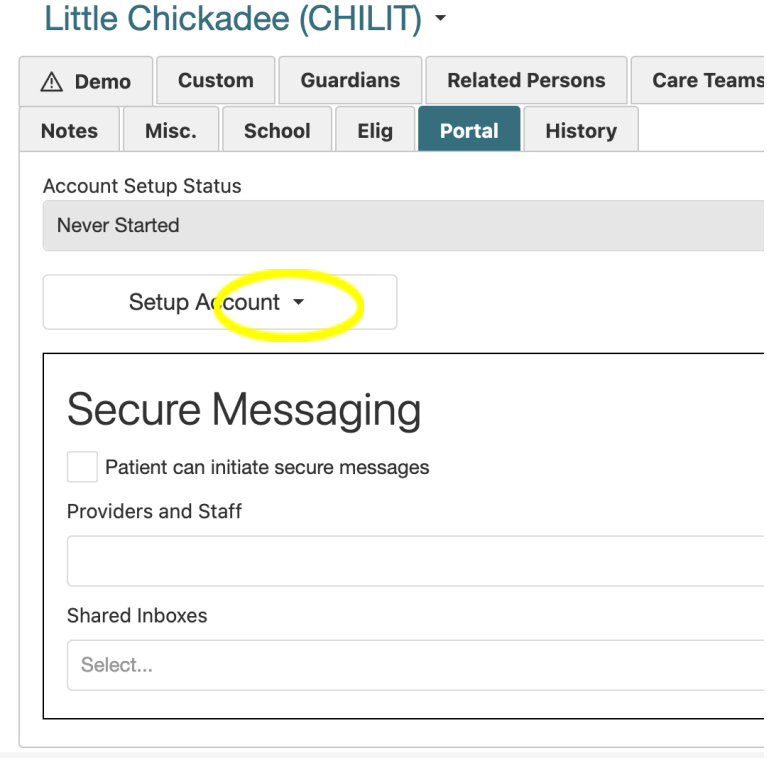


To Send Client Forms

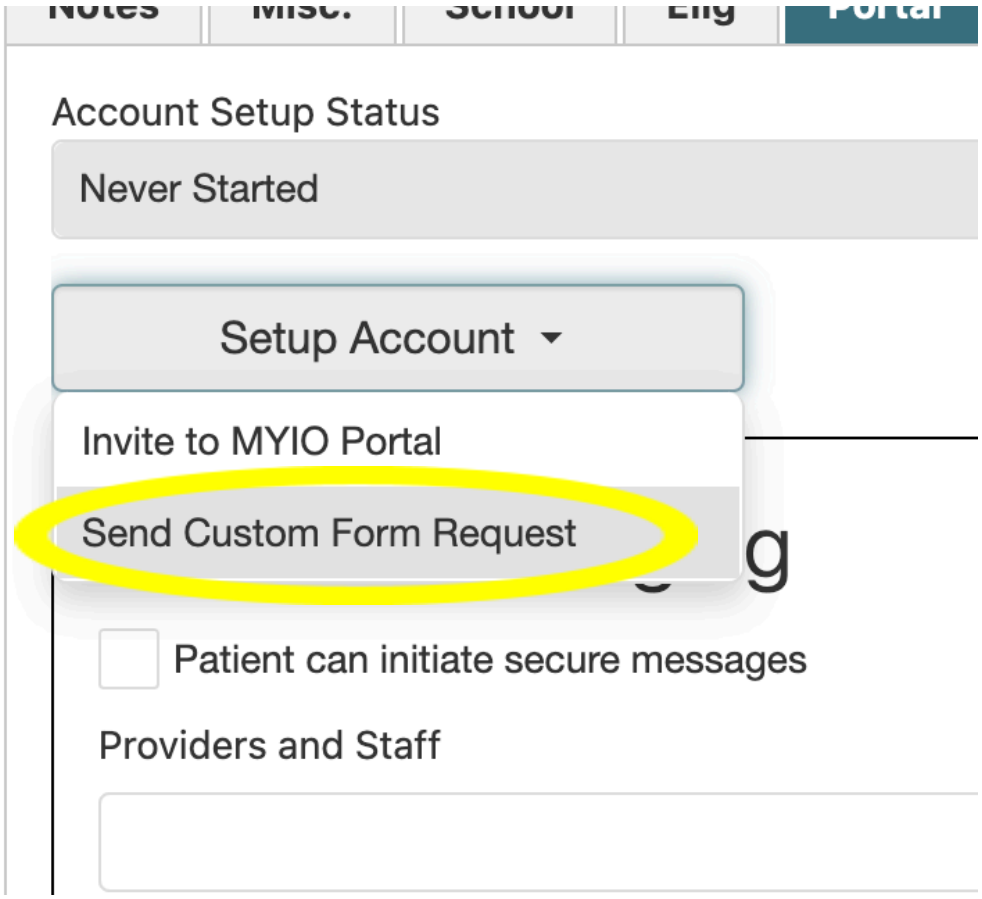
From the Patient Demos Info Page (cannot access this from the client file) Click > Portal



Click the little down arrow for “Setup Account”



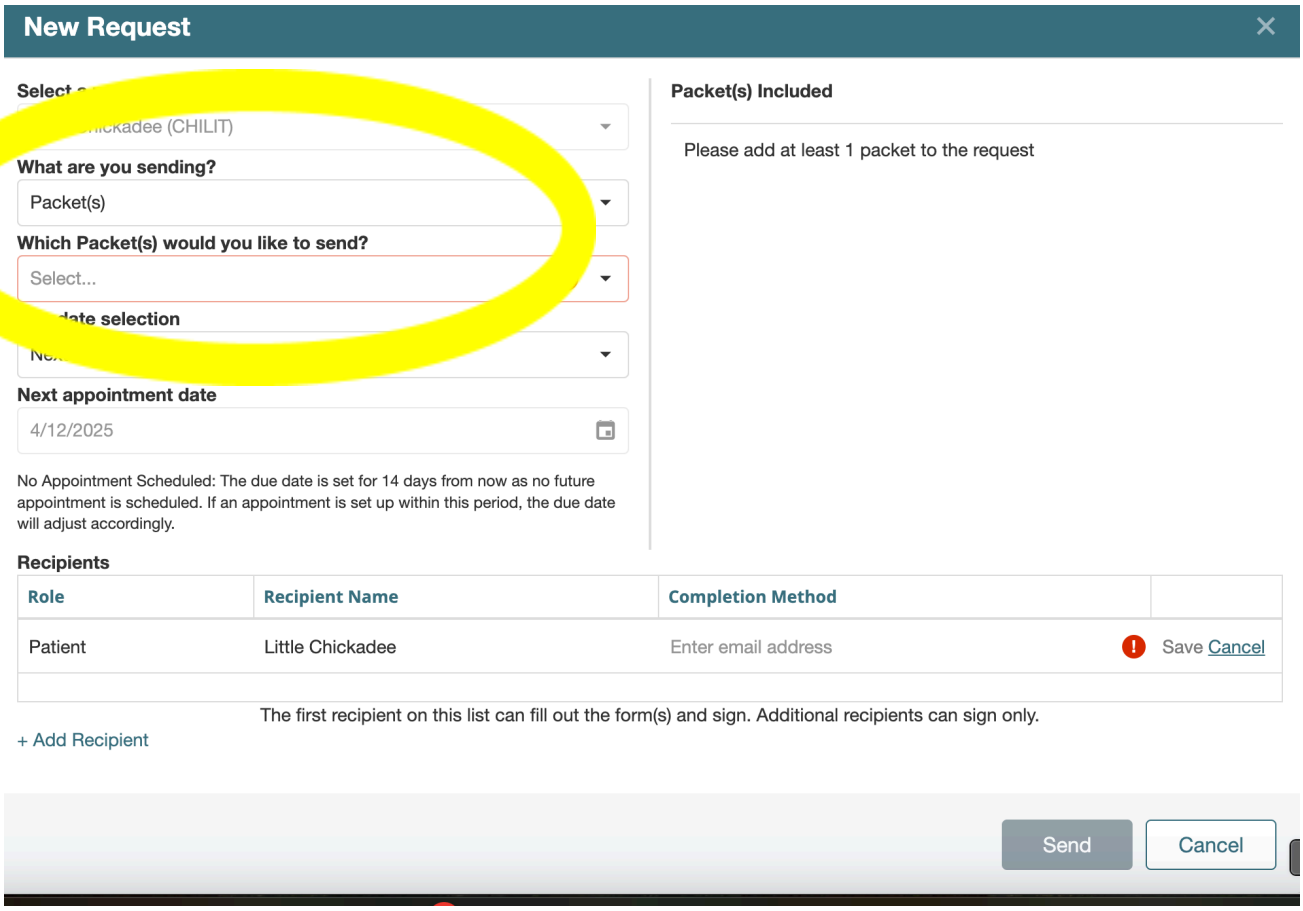
To first invite a client to set up their account click “Invite to MYIO Portal". This will prompt you to send them an initial invite to set up their account. Then you can send them forms. By clicking > Send Custom From Request



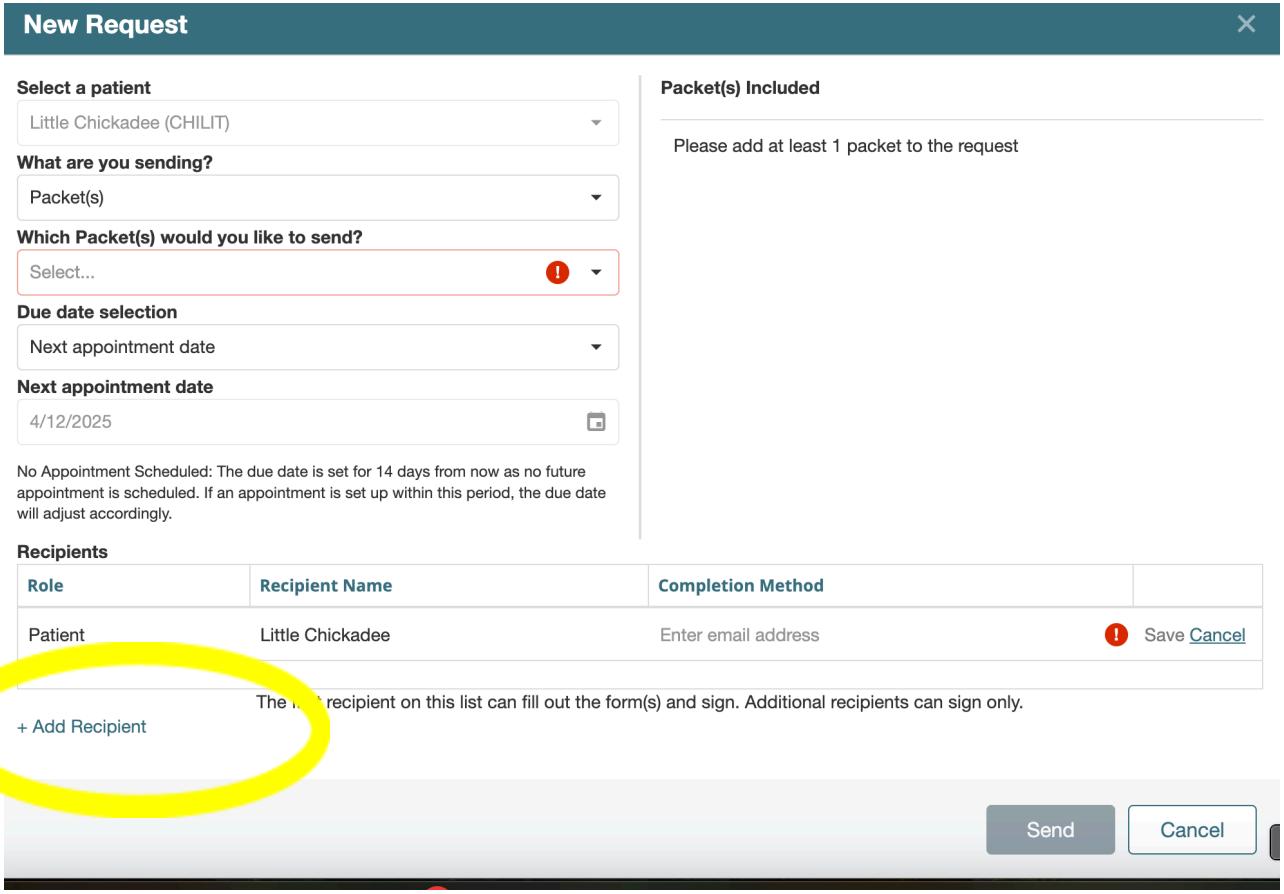
You can choose either to send a “packet” or an individual form.

In Each Packet	Send as an individual form as needed
Personalized Information about My Practice Professional Disclosure Rights and Responsibilities Informed Consent for Treatment Privacy Practices Consent to Use and Disclose Health Information (In “using insurance” packet) Self pay from (in self-pay packet-if provided)	Release of Information Emergency Contact Form VCR Email and Text Policy

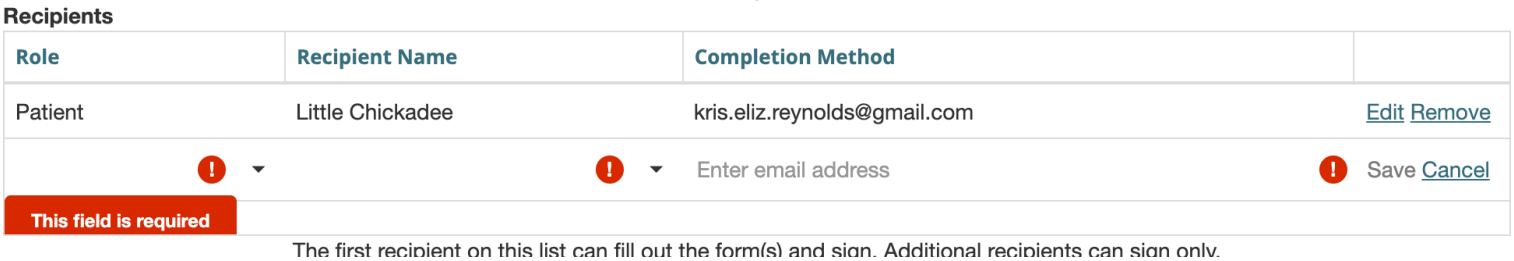
Choose the packet or forms that are applicable



You then have the opportunity to add a recipient in addition to the client. You must have added potential recipients into the client demographics and Guardians.



Add the guardians you wish to send forms to. Note you can also remove the client from this list once you have an additional recipient, if you only want to send a form to a guardian and not the client. Make sure to save.



Send