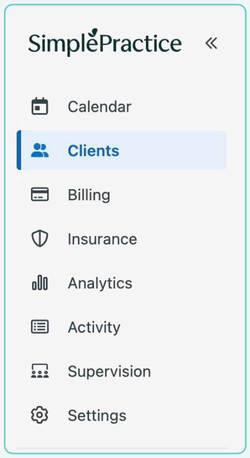
ZPH
ZARABIPSYCHOLOGICAL HEALTH

SETTING UP A NEW CLIENT

Adult Client — Steps 1-4

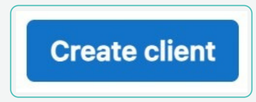
1 CLIENTS TAB

Click the Clients tab on the left-hand navigation sidebar of SimplePractice.



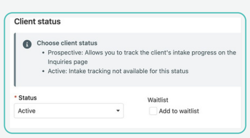
2 CREATE CLIENT

On the right-hand side, locate and click the Create Client button to open a new client record.



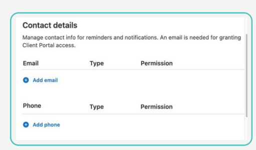
3 CHANGE STATUS

Set the client status to Active using the status dropdown. Prospective status limits intake tracking — do not leave it as default.



4 ADD CONTACT INFO

Enter the client's email address and phone number. An email is required to grant Client Portal access and send intake forms.

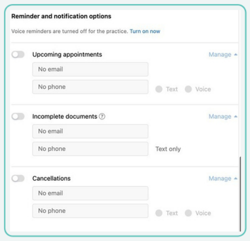


SENDING INTAKES & NOTIFICATIONS

Steps 5-8

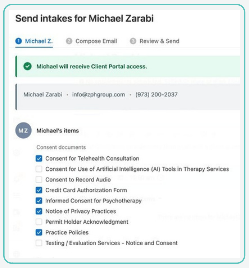
5 SET NOTIFICATIONS

Enable all radio buttons so the client receives upcoming appointment reminders, cancellation alerts, and incomplete document nudges via email and text.



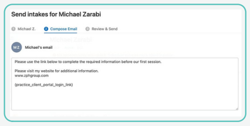
6 SEND INTAKES

A list of intake forms pre-selected by ZPH Group appears. Review the list and confirm all required forms are included before proceeding.



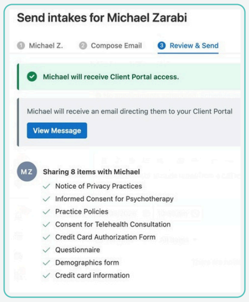
7 COMPOSE EMAIL

A pre-formatted intake email will be shown. The default text is approved by ZPH — send it as-is unless you have a specific reason to customise.



8 REVIEW & SEND

On the final review screen, confirm the documents scheduled for delivery, then click Send to deliver everything to the client's portal.



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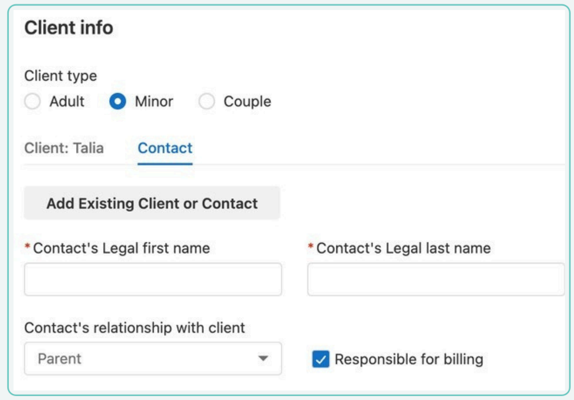
MINOR CLIENTS & SCHEDULING

Steps 9-10

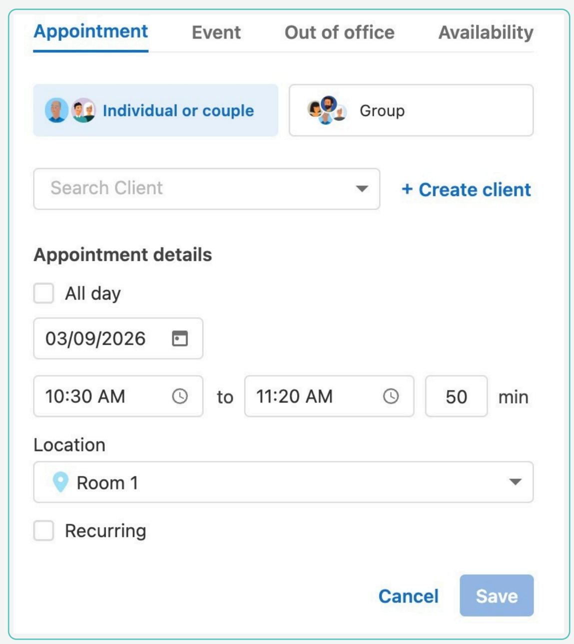
9 MINOR CLIENT

Select Minor as the client type. Navigate to the Contact tab and add the guardian's legal name. Mark the guardian as Responsible for Billing.



10 SCHEDULE FIRST APPOINTMENT

Click the calendar icon in the left menu. Search for the client in the dropdown. Set the correct date, time, and location (Room 1). Verify all details before clicking Save.



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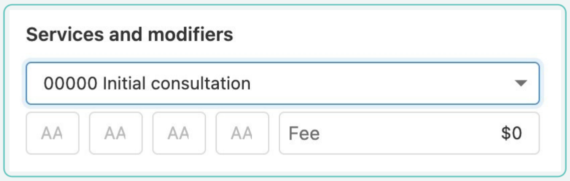
SERVICES & CPT CODES

Steps 11-12

11 SERVICES

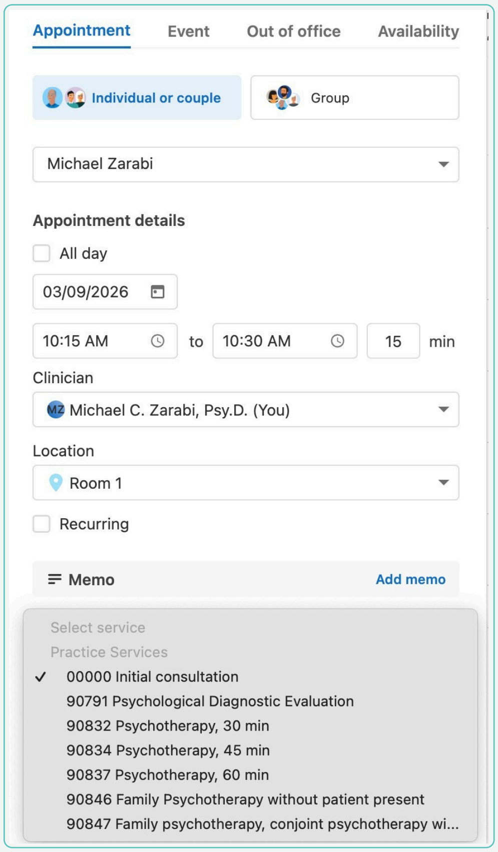
Within the appointment record, click the Services and Modifiers box to reveal the full list of CPT codes available in the practice.



12 SELECT CPT CODE

Choose the code that matches the session type:

90791 Diagnostic Intake
90832 30-minute session
90834 45-minute session
90837 60-minute extended session
90846 Family therapy WITHOUT patient
90847 Family therapy WITH patient



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QUICK-REFERENCE CHECKLIST

Use this as a final verification before saving the client record

ADULT CLIENT

- ☐ Client tab opened
- ☐ Create Client clicked
- ☐ Status set to Active
- ☐ Email + phone entered

INTAKE & COMMS

- ☐ All notification toggles enabled
- ☐ Intake forms reviewed (ZPH presets)
- ☐ Intake email sent as-is
- ☐ Final documents confirmed & sent

BILLING

- ☐ Services box clicked
- ☐ Correct CPT code selected
- ☐ Fee reviewed

MINOR (IF APPLICABLE)

- ☐ Client type set to Minor
- ☐ Guardian added under Contact tab
- ☐ Guardian marked Responsible for Billing

SCHEDULING

- ☐ Calendar icon used
- ☐ Correct client selected
- ☐ Date, time, location verified
- ☐ Appointment saved