At 1st apt: collect signed intake docs and notify clients of benefits/collect payment or cc form-upload intake docs, insurance, cc form and Telligen doc into TN, put demographic info and contacts in TN

**URBAN WELLNESS WORKFLOW**

Keep TherapyNotes accounting accurate

Complete treatment plans, contact notes, and termination notes

Keep appropriate contact with guardians, PCPs, or treatment providers

Talk with clients about billing concerns or issues

Send client statements (paid or due)

Charge credit cards at the beginning of each month. Send blank cc form for denied cc and notify clinician to take payment at next session

Count down Telligen or EAP sessions and get new auth when needed (after EAP is done, switch CPT code in TN)

Bill all paper EAP claims (Magellan, Workplace Solutions, FEI) and fax to EAP

Fix insurance payment/claim issues

Send insurance claims for sessions

Complete progress note-use correct CPT code (EAP, UBH, family session, etc) and correct diagnosis codes

Schedule follow up appointment

Do benefit check and email to clinician-Give clinicians Telligen form for Telligen clients

Answer and schedule intake calls

Administration

Clinician