

Client Intake Form
Jeanne M. Morris-Foley, N.P. Psychiatry P.C.

Last Name		First Name		MI
Address		City/State		Zip Code
Date of Birth			Social Security #	
Gender (circle one):		Male	Female	Marital Status:
Home Phone #		Work Phone #		Cell Phone #
Email:				
Referred By:				
Insurance Co. Name		Insurance Co. Address		Insurance Co. #
Policy ID #	Group #		Group Name	Eff. Date
Subscriber Name:		Subscriber DOB:		Subscriber SS #
Relationship to Subscriber:				

PAYMENT METHODS

FEE

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|--------------------------|-------------|----------------------|
| ☐ | VENMO | 2.99% plus .10 cents |
| ☐ | ZELLE | Free |
| ☐ | PAY PAL | Free |
| ☐ | APPLE PAY | Free |
| ☐ | CASH APP | Free |
| ☐ | CREDIT CARD | 3.5% plus .15 cents |
| ☐ | CHECK | Free |