



Helena Occupational Therapy Specialists, PLLC
1325 Euclid Ave #3 Helena, MT 59601
Phone (406) 422-7729 fax (406) 403-0588

CLIENT INFORMATION

Client's legal name: _____ DOB: _____ Sex: _____
Address: _____ City: _____ State: _____
Home Number: _____ Cell Number _____
School: _____ Grade: _____ Referral Source: _____

PARENT/RESPONSIBLE PARTY INFORMATION

Parent/responsible party name _____ Relationship to client _____
Address: _____ City: _____ State: _____
Home phone: _____ Cell Phone: _____ Employer: _____
Do we have permission to communicate via text? Y/N _____
Email address: _____

Do we have permission to communicate via email? Y/N

Do we have permission to send email updates related to Helena Occupational Therapy Specialists and the services they provide? Y/N

Parent/responsible party name _____ Relationship to client _____
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INSURANCE INFORMATION:

	<i>Primary insurance</i>	<i>Secondary insurance</i>
Name of health insurance company:	_____	_____
Name of policy holder:	_____	_____
Relationship of policy holder:	_____	_____
Policy #	_____	_____
Group #	_____	_____
Policy holder's SS #	_____	_____
Policy holder's DOB	_____	_____
Policy holder's telephone number:	_____	_____

Picture of insurance card: