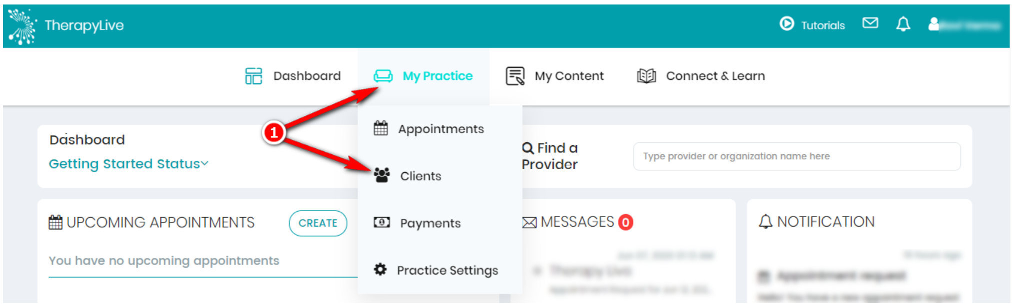
Knowledgebase > Managing Clients > How do I add a new client?

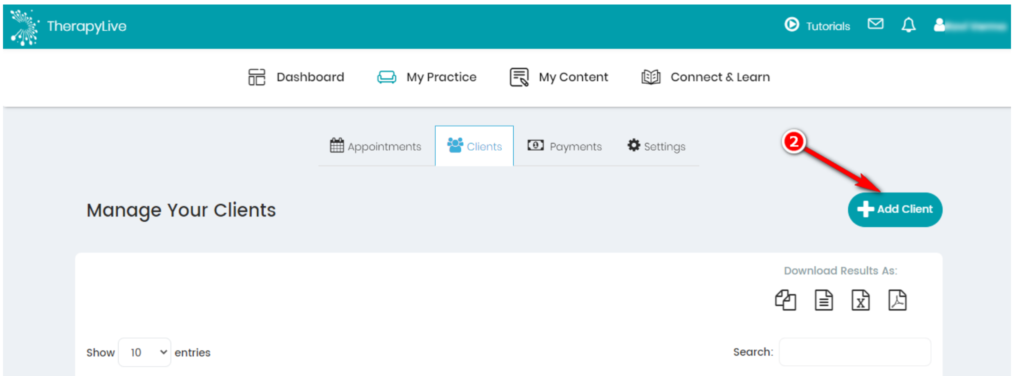
How do I add a new client?

Customer Success Liaison - 2020-08-19 - in Managing Clients

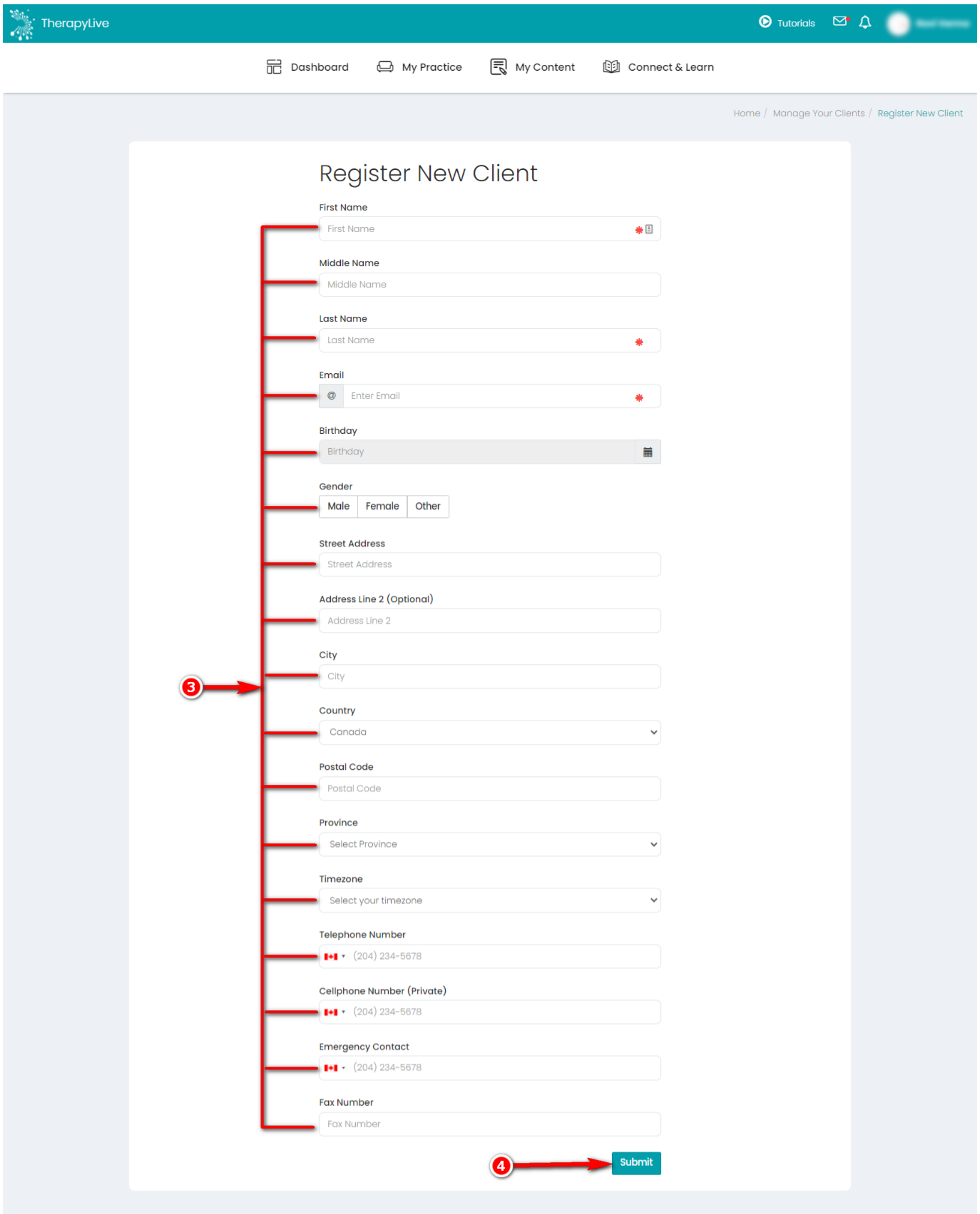
1. Go to “My Practice” and click on “Clients” from the drop-down menu options.



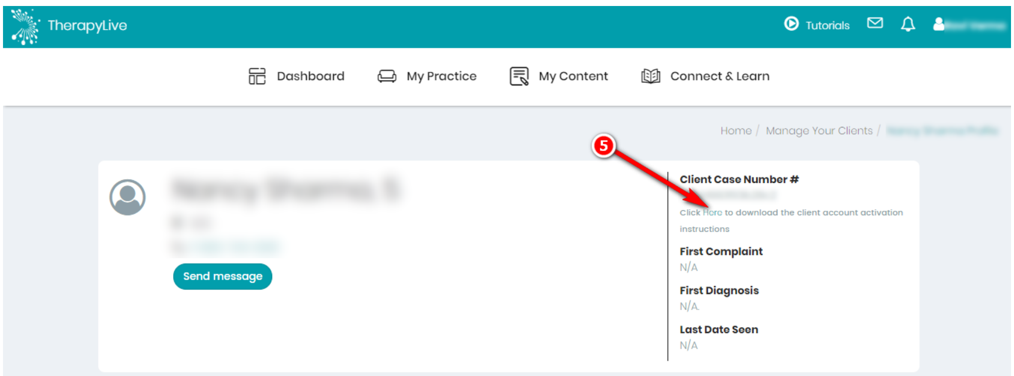
2. Click on “Add Client”.



3. Fill out client’s information such as - Name, Email, Birthday, Gender, Address, Time Zone, Phone Number, and Fax Number.
4. Click on “Submit”.



5. You have successfully created a client to your caseload. You can now give the access code to your client and ask them to create a Therapy Live account. Open the client that you have created and click on "Here".



You can also add a new client by accessing your Dashboard:

1. You will find a section called “Summaries” located at the bottom of your Dashboard page.
2. Here you can select the “Add Client” option and add them to your caseload by inputting their information.