



www.heritagecw.com

910.240.4599

Option 1: Access Forms from the Heritage Website

1. Visit our website [here](#) to download all forms listed within the “Required Forms” heading.
2. Once downloaded, fill using one of the following methods:
 - a. Print , fill, and sign by hand
 - b. Using Acrobat Adobe Reader, fill and sign forms
 - i. Acrobat Adobe Reader must be installed on your PC for this option
 - ii. Form must be opened using Acrobat Adobe Reader for this option.
3. Return forms to us in one of the following manners:
 - a. If first appointment is via Telehealth:
 - i. Mail completed forms to 215 Fish Drive, Angier NC 27501
 - b. If first appointment is in Office, chose one of the following options:
 - i. Mail completed forms to 215 Fish Drive, Angier NC 27501
 - ii. Bring forms to your first appointment
 - c. If you wish to fill, submit, and return forms electronically, please see Option 2: Access Forms from Client Portal.

Returning forms via email is not recommended as not all email services are encrypted. Using unencrypted email will increase the likelihood of a data breach where your PHI (protected health information) could become visible to unauthorized parties. If you choose to return forms via email, you acknowledge the risk and will not hold Heritage Counseling and Wellness PLLC for any data breach related to this activity.

Option 2: Access and Submit Forms from the Client Portal

1. When setting up an appointment, your clinician will ask if you would like to use the client portal to complete forms. If yes, the following will occur:
2. The clinician will send a welcome email and assign the required documents
3. Follow the link in your email to setup your portal user name and password
4. Within the portal, download, print, and fill the assigned documents.
5. Upload completed documents to the portal
6. E-Sign required documents as prompted and submit.