When You Get a New Client

Respond to the Inquiry email

- Let Michelle or Marissa know you received the inquiry by responding to the email with a simple “got it” or emoji, no need to send a formal email in response.
- If you do not respond in a timely manner, we may send a follow up email letting you know we have reassigned the client elsewhere. The ideal is to respond to inquiries asap, and definitely within 24 hours.
- After you have done a screening interview, reply to whoever sent you the inquiry to let them know what the final result was: booked client, referred client, client never responded, etc.

Initial Phone Conversation

1. Recap the info that the client submitted on the webform or phone message
2. Establish rapport with **empathy**
3. Ask **screening** questions to determine fit for you & for SAL
4. Discuss & negotiate **fee**
    - Ask if they have private insurance or medi-cal
    - Use the income they stated on their inquiry form or ask them their income
    - If they have private insurance inform them:
        i. Their costs might be lower by using an in-network provider (depends upon their insurance plan details)
        ii. They will most likely not be able to use out-of-network benefits for services provided by an intern.
    - Quote them the fee according to our sliding scale (or your personal minimum if you are an associate).
    - Ask if that fee is workable for them
    - Use your discretion to negotiate a lower fee, if you choose to. Otherwise, refer them to Family Service Agency or the County Behavioral Health department.

5. Schedule first session or refer them
    - To another SAL counselor (cc Michelle). This is preferred.
    - Back to Michelle
    - Outside the agency (whenever the client would be best served by this choice)

6. Collect the Name, Date Of Birth, Email & Phone to input into TherapyNotes.
7. For couple therapy (fee for service) also collect the partner’s Name, Date Of Birth, Email & Phone.
8. Tell the client about the **Client Portal**. Ask if the client has computer access.
9. Give any needed Directions or Parking info (refer to our “locations” webpage)
10. Give the client your **direct contact info** and tell them to contact YOU not SAL if they need to reach you.
11. If the client is a couple or family, see the TherapyNotes Instructions for Couples & Families

Afterwards:

- Schedule "**Therapy Intake"** session, 90791 (Not "Therapy Session") in TherapyNotes
- Send the appropriate **Portal Forms** and **Library Forms (if needed)**. Check the Portal Document Guide to determine what forms need to be sent.
- For couples therapy also send the **Couple-Family Therapy Participant Form** to gather contact information and obtain informed consent from the partner.
- For therapy with children 11 and under, ask a parent to fill out the **Portal Forms.** Additionally, send the **Parent Information - 11 and Under** form to all parents or legal guardians.
- For therapy with teens 12 and older, ask if the teen is willing and able to fill out the **Portal Forms** themselves. The parent may need to set up the portal if the teen does not have a usable email address. A parent can sign the forms if the teen does not. Additionally, send all parents or guardians the **Parent Information - 12 and Over** document. In the rare case when the adult presenting the child for therapy is not a parent or legal guardian, send them the **Non-parent Caregiver Affidavit** form.

    A. Tip: You do not need to send the "Welcome to the Portal" email. It is included in the Document Request. But if you do this, know that the client will not see anything you put in the "Instructions" box. That box only functions when TherapyNotes is not simultaneously sending the Welcome to the Portal message.
    B. Tip: If your access to the list of documents is blocked by your computer's autofill options, press the spacebar and then delete.
    C. Tip: When looking at the Document Library, click the Document Name header to view the Documents in alphabetical order.

- Sometimes a client might already be in our system. This happens for one of three reasons:
    - They used to see a therapist at SAL, discontinued services and are returning to therapy. In this case, please ask the client if they wish to give permission to access their old file. Explain to them that this will make it such that, if the forms are complete and current, they will not need to redo them. It will also give you access to their previous progress notes. If the client agrees, request access in TherapyNotes and email Michelle to request permission. If the client prefers you not have access to their old file, create a new file.
    - They are currently working with a therapist at SAL but are switching to a new therapist. In this case, you will follow the same steps listed above.
    - They are currently working with a therapist for one treatment unit (example: as an individual) and are beginning to work with a new therapist for a new treatment unit (example: as a couple). In this case you will want to create a new file for the new treatment unit to avoid billing confusion and to protect confidentiality. Enter the client into the system again using a qualifying word in the name (such as "individual" or "couple" or "family") to differentiate the files. In this case they will need to complete the forms again.

<u>First Session</u>

Prepare:

- Check to see if they have checked into the Client Portal and if they have sent the documents you requested.
- Print the **Client History form**, if they filled it out, so you can go over it to fill in missing info.
- If they did not submit the **Consent for Services**, print a blank one and do it in session.
- If they do not have computer access, print a paper Intake Form as well (this is in lieu of the Client History Form. All paper forms are accessible from the Google Drive: Basic Client Forms. Or they can be printed from the TherapyNotes Library.

1. Connect with them through small talk
2. Go over key elements of the **Consent for Services** verbally if they already submitted it:
   - Remind them of confidentiality exceptions
   - Tell them your Contact Policies and give them your card
   - Reaffirm the agreed upon Fee, Cancellations Policy, & Credit Card Agreement

   Go through the entire **Consent for Services** if they have not submitted it through the Portal yet.
   If they do not have computer access, fill out the Intake Form (Client History Form) with them in session or give them a paper copy to fill out and return at the next appointment.
   You will upload these docs to TherapyNotes if the client does not send the portal versions.

3. Discuss your client's **presenting problem,** focus on any pressing issues.
4. Discuss with your client what their **goals** are.
5. Explain to the client how therapy works (practice how you will articulate this beforehand).
6. Dive in to doing therapy with the client, especially addressing pressing issues.
7. Tell client about any additional **portal documents** you will send after the session.

- Additional ROIs (if not included in the Informed Consent)
- Additional Assessments (depending upon your client's presenting problem)
  - ❏ Substance Use (Adult/Youth)
  - ❏ Depression (Adult/Youth)
  - ❏ Suicide (Adult/Youth)
  - ❏ PTSD (Adult/Youth)
  - ❏ Child/Youth Symptoms
  - ❏ Child/Youth Anxiety
  - ❏ ADHD
  - ❏ Temperament Questionnaire

8. Write the next appointment on **your business card** and hand it to them, pointing out that the info on the card is your direct contact information.

9. Collect cash or check payment if they are not paying by credit card.
Afterwards:

1. Process the client's billing information, depending upon how they pay.
2. Schedule the next session as a "Therapy Session". Use **90837 for Medi-Cal** clients and **Private Pay** clients. (For telehealth: Add modifier 95 and Place of Service "02").
3. Start the **Psychotherapy Intake Note**. You can wait to finalize this note, so that you can add information gathered over the first few sessisons before you sign it. This note serves as your Assessment Form. Scan and upload the Consent for Services and Intake/History form if you received them as paper copies.

Second Session

Prepare: Check Client Portal to make sure everything sent through it has been submitted.

Complete anything left undone in the first session.

Afterwards: TherapyNotes will prompt you to write a Progress Note, which will require a Treatment Plan. You can also use the **Create Note** tab on the patient's Documents panel to create a Treatment Plan prior to your second session.