**Reception Doc for**

**Carmichael Psychology**

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# 

# Introduction

Answer the phone: “Thank you for calling Dr. Chloe’s office. This is \_\_\_\_\_\_\_\_\_\_. How may I help you?”

* **General phone**: 212-729-3922
* **Hours**: 7am-9pm M-F, 10am-4pm Sat, 10am-6pm Sun
* **Address:**200 Park Avenue, 17th Floor, MetLife Building  
  New York, NY 10166
* [www.BookMyAppointmentNow.com](http://www.bookmyappointmentnow.com) to access MindBody
* IF THE MEDIA CALLS/ LEAVES MESSAGE WANTING TO KNOW IF DR. CHLOE IS AVAILABLE FOR A TV APPEARANCE:
  + SAY **‘YES’** AND get the person’s name/phone/email/company name/web site in case you’re disconnected.
  + Transfer the call to Dr. Chloe’s Personal Assistant IMMEDIATELY
  + The idea is to make sure we don't lose the opportunity. TV Media will literally go down a list of possible interviewees till they get confirmation of YES, so give them a YES ASAP.

***Remember to notify on “Reception Desk” chat group before stepping away for any reason as well as to announce your return. We use chat for "real time" communication. We don't want to chat and then stare/wonder if anyone is there, and it helps in a virtual environment to be able to "see" when someone steps out.***

# 

# FAQ

## 1. Question/statement: *“Hi, did you say ‘Dr. Chloe’s Office?’ I’m actually calling to book an appointment with (name of associate)”*

**Answer:** Sure, I can help you with that.  \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is a therapist in the office of Dr. Chloe Carmichael, that’s the only reason why we answer the phone as ‘Dr. Chloe’s Office’.  Do you need any information about billing or insurance, or can I book you an appointment?”

## 2. Question: *What issues do you work with?*

**Answer:** Dr. Chloe’s office works mostly with issues like anxiety and stress management, relationships, careers and other goals.

**RECEPTIONIST:** Dr. Chloe’s bio is on [www.DrChloe.com/About](http://www.drchloe.com/About) and each therapist’s bio is on [www.DrChloe.com/Associates](http://www.drchloe.com/Associates) we encourage you to view- it puts “names with faces”. Knowing basic info about Dr. Chloe and Associates increases your ability to be a good receptionist, and often helps move clients to next level of giving insurance information or booking an appointment.

Note: Don't refer clients to /associates unless there's a specific reason. If client is unsure of whom they want to see, please suggest for client to have a free 15-minute phone consult with Dr. Chloe.

**We do NOT work with:**

* Substance Abuse
* Children below 18 (16 & 17 yrs old are OKAY w/ special exception from Dr. Chloe)
* Bipolar, borderline, schizophrenia
* Anything to do with physical danger to self or others (anyone expressing issues w self-harm should be told to call 911)

## 3. Question: *Do you take insurance?*

**Answer**:

* Yes, We work with insurance as an out-of-network provider.  We have a billing manager who files all of the claims and paperwork so **you’re not stuck waiting** for reimbursements, and we only charge your credit card for the amount not covered.
* Our biller makes things **easy**
* We will be **happy to look up** your benefits for you in advance so you can see how much it would cost.  Do you have your insurance information handy?
* **I can take it now over the phone**.  (we prefer you get it over the phone to avoid anyone “forgetting”, but people can also submit online at [www.CheckMyBenefitsNow.com](http://www.checkmybenefitsnow.com) if they want)
* Inform the client that benefit lookup may take some time and we will email them within 1 hour with their benefits and costs.
* **Medicaid/Medicare/Oscar/Fidelis DO NOT have OON benefits**

## 4. Question: *What does Out of Network mean?*

**Answer**: I’m more than happy to explain that to you. If you have out of network benefits there is a deductible that needs to be met before insurance will start to kick in. Once that deductible is met insurance will cover a certain percentage of the fees leaving you responsible for the remainder.

## 5. Question: *How much is my deductible? Or once my deductible is met how much will I pay?*

**Answer**: I’m really sorry but I can’t provide with those exact numbers just yet. If you can provide me with you insurance information, I would be more than happy to look up your benefits, and get back to you with a quote.

## 6. Question: *What hours does \_\_\_\_ have?*

**Answer:** (receptionist consults MindBody to view schedule by day or week. Hover over available blocks to see whether availability is for therapy appointments or just free 15-minute phone consultations)

## 7. Question: *Where are you located?  OR I’m nearby and can’t figure out how to enter building OR I’m running late*

**Answer: Likely to Include SOME of following info:**

* We are located at 200 Park Avenue, MetLife Building, 17th Floor in Grand Central Station
* If a client calls to say they are running late to their appt, no problem. Offer them to start their session by phone or video if they would like. Thank them for calling & chat & email the therapist the message. Therapists' emails are in Mindbody (scheduling system)

## 8. Question: *Now that I’ve booked my 15-minute phone call, what’s next? Do I call the therapist, or does the therapist call me?*

**Answer:** If the phone consult is with **Dr. Chloe, she will call them**. If the phone consult is with **any of the other therapists, the client is to call the consult line at their appointment time**.

## 9. Question: *Do you take international clients?*

**Answer:** Yes, we do. Our therapists are not licensed outside of the U.S., so international clients are only eligible for coaching and must have a free 15-minute phone consult with Dr. Chloe First to confirm they are appropriate for coaching.   
  
If client is international, then the client MUST call Dr. Chloe for the consult. Dr. Chloe cannot make international calls and free 15-minute phone consults are NOT available via video. Provide the conference line number and access code. ***You must provide this number to both the therapist and the client.***

## 10. Question: *I’m only available once every two weeks, will it be possible to book in a biweekly schedule?*

**Answer:** Thank you for letting us know about your availability but we cannot book a bi-weekly session at this time.

**Note:** A client may book up to 3 future appointments and may be on a biweekly schedule, but NOT more than 3 appointments at a time. Please also let the client’s therapist know of the client’s request, so the therapist may discuss session frequency with client at next visit.

## 11. Question: *I’m here for my appointment but security won’t let me up.*

**Answer:** I am SO sorry about that.  We did submit your name, I will follow up on that - but right now I’m going to call security so they can let you up.

## If client has questions Reception CANNOT answer

* If it’s a logistical question, call, chat and/or email the Reception Manager (RM) for answer (ask for ct’s email address so you may answer via email if RM is not available)
* If it’s a therapy question, steer clients towards Dr. Chloe for 15 minute phone consult.  She will be able to make the best recommendation for which therapist would be the best fit for the client, talk about which therapy approach would be best for client, etc.
* If client ever talks about wish of self-harm, tell them they must call 911

**Advanced Questions**

## *Question: I'd like to book an appointment for my daughter*.

**Answer:** Thank you for considering Carmichael Psychology. I’m sorry, but we only book appointments when requested directly by the potential client. Please feel free to share our contact information with her, if she is over the age of 18. We see adults who are willing and able to book their own appointments.

## *Question: If you don't accept my insurance, why does it say online that you take my insurance?*

**Answer**: I’m sorry for any confusion. We do accept your insurance as an out of network provider. We work directly with your insurance company. We have a billing manager who files all of the claims and paperwork so you’re not stuck waiting for reimbursements, and we only charge your credit card for the amount not covered. I’d be happy to look up your insurance benefits for you.

**Emblem Health Specifically**

I apologize for the confusion this may have caused you! The reason why it’s showing online that we accept your insurance, is because there’s a plan with Emblem Health that does have out-of-network benefits and that’s Emblem Health GHI.

## 

## *Question: I'd like to set up an appointment via video. How much is the charge?*

**Answer:** If ct’s current location is within area that Dr. Chloe is licensed (NY, VA, or MD), then client can use insurance. You can tell the client if he/she has the insurance information handy, we are more than happy to look up his/her benefits then get back to him/her the quote.

***If client is located outside area of practice:***

Sample verbiage: Since you are located in a place where Dr. Chloe is not licensed, we are unable to provide therapy but will be glad to offer coaching if Dr. Chloe feels you are a good candidate for online coaching. You are welcome to plan a free 15-minute phone call with Dr. Chloe so she can learn more about your situation and let you know in advance of booking a paid appointment whether she feels you would be a good candidate for online coaching. Please note that coaching is available for private pay and is not reimbursable by insurance.

-Dr. Chloe Carmichael $500 per session

-Associate Therapist $200 per session

## 

## *Question: I'm from France (or any areas outside the U.S.), can I schedule a therapy session?*

**Answer:** *Answer for this should be the same as response to question above.*

## 

## *Question: I can't afford the rates for now, do you offer sliding scale fee?*

**Answer:** No, I’m sorry we don’t.

## 

## *Question: I'm the mom of Patient's Name. I'd like to speak to her therapist. I was advised by her doctor to let you know more about her situation.*

**Answer:** I am sorry, we cannot confirm nor deny that a client is receiving services at Carmichael Psychology. I would be more than happy to speak with you directly regarding billing once we have a consent to release on file from the client.

If \_\_\_\_\_ is a client here, then I will send them a consent to release form and let them know you called.

## 

## *Question: I've been to your practice before and I'd like to schedule an appointment again.*

**Answer:** We’re happy to hear from you again! I am more than happy to get something scheduled for you. Also, if I may ask, will you still be using the same insurance that you used before or do you now have a new insurance plan?

## 

## *Question: I'm from Connecticut (or any other part of the U.S.) but I work in NY, can I book an appointment?*

**Answer:** Handle it like a normal NY client.

***Question: Do you work with children?*Answer**: I’m sorry, but Carmichael Psychology only works with adults.

## 

## *Question: I'm looking for a psychiatrist, can I book an appointment with Dr. Chloe?*

**Answer:** I’m sorry, but Dr. Chloe is a psychologist and not a psychiatrist and is not able to prescribe medications.

Free 15-minute phone consults are available with any of our therapists, but is strictly via phone, no in-person free consultations and NOT available via Skype video or Zoom. Free 15-minute calls are only available for NEW clients, not existing ones.

**If Reception plans a call for the Associates outside their normal hours or if a client is out of the country, they need to use the international conference line. The conference line is also used if it’s a phone consult or phone session for a couple.**

# Daily Insurance Schedule SS

Insurance info is entered on the **Daily Insurance Schedule** spreadsheet**.**

Info collected on the Daily Insurance Schedule includes:

* Client's full name
* Client's phone number
* Client’s Email
* DOB
* Name of insurance provider
* Member ID
* Phone number for insurance company (customer or provider services)
* Client’s insurance coverage

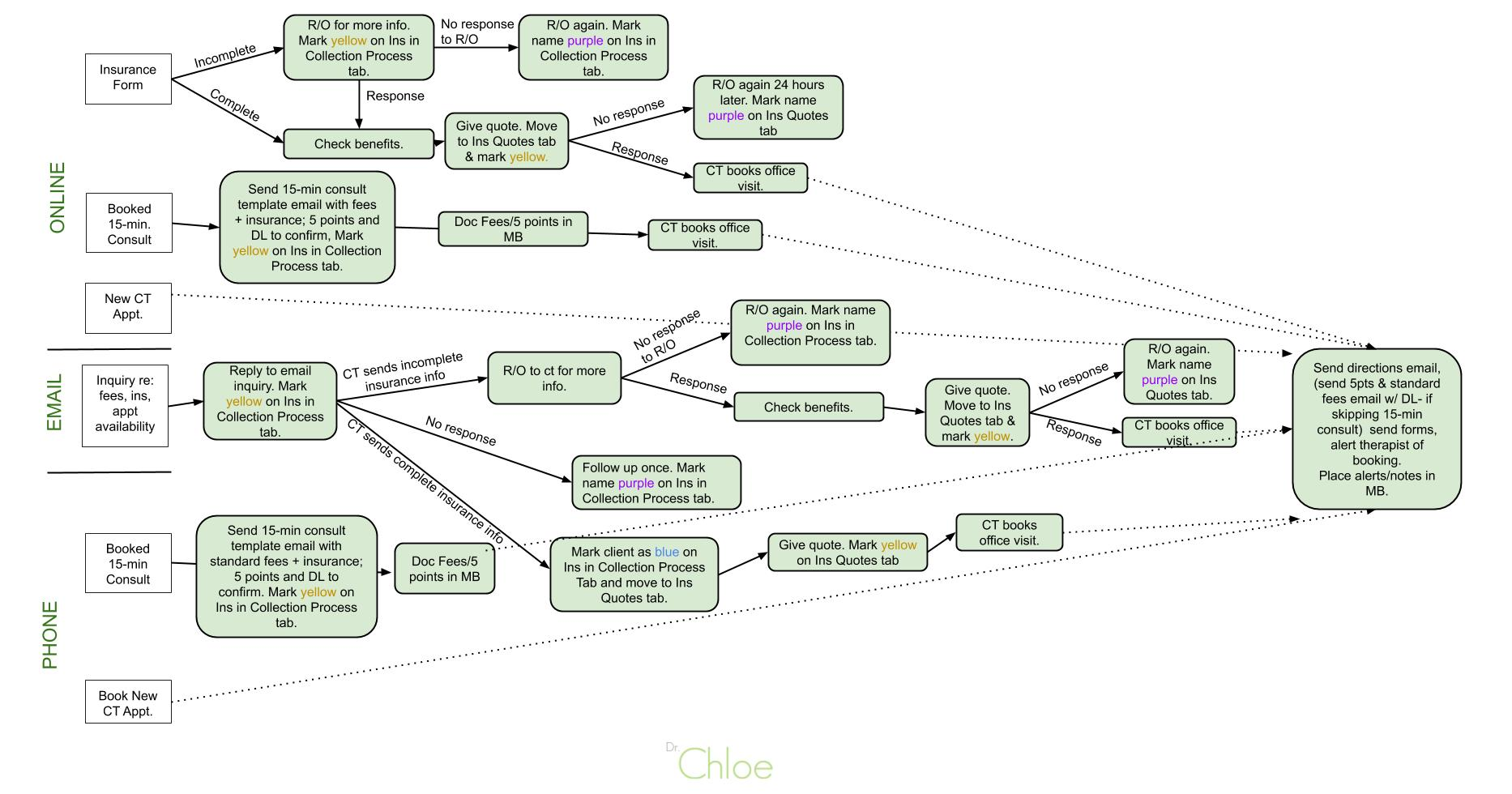
Note:

* DIS colors and content must be updated in REAL TIME, not at the end of shift
* The easiest way to stay on top of DIS follow-ups is to keep the sheet current, and just scan for Yellow

**RECEPTIONIST:** Even if client does NOT have insurance but books an appointment, please add their contact information to daily insurance spreadsheet and note “No Insurance” in Insurance Carrier column.

**New Clients**

**Flowchart for New Client Process**



**Steps to take with New Client:**

**Step 1:** Book the appt in MB (or client can book on their own)  
 **\*Note:**If you are booking a new session for a client and inputting their info into Mindbody, you may receive a suggest client name from Mindbody. Never select the suggested name given by Mindbody.

**Step 2:**Email 5 pts and fees, place DL on Google calendar

**Step 3**: (for session only) Send directions email; the email should also ask the client to sign the CCA, CA & HIPAA (IR if applicable) (coaching agreement to coaching clients and NOT CA & HIPAA)

**Step 4:** Session notes should be placed on MB Calendar

**Example:**HC 8.10.16- Awaiting confirmation 5pts and fees; Direction email sent; Ins and fees noted in profile

**Step 5:** Place Alerts for documents needed in client’s profile (done most of the time by Office Assistant)

Alerts should be noted as:  
HC 8.10.16 - NEEDS CCA, CA & HIPAA, HK \*\*HK is ONLY needed for appts w/ associates, NOT Dr. Chloe\*\*

\*\*Insurance Reimbursement form sent ONLY to clients w/ BCBS or Beacon Health insurance\*\*

**Step 6:** Notes should be placed in client’s MB Profile (Insurance). If we don’t have insurance information or are waiting to confirm benefits, please place standard fees in the profile until benefits are confirmed.  
  
IF a client books an appointment, but does NOT have their insurance information yet (i.e. Member ID), then you may simply note in the DIS in the Member ID column 'waiting for Member ID' -> this will convey to the rest of the team that you are aware that the Member ID is missing.

If client has NO OON, there’s no need to fill out the Insurance Company and Insurance Policy # in MB profile.

Also, document this in Mindbody on the appointment where you note "confirmed fees and 5 pts". **Example:** "Ct confirmed fees and 5 pts. 9/24 HC MISSING Member ID - ct will provide by 9/25 HC"

**Step 7:** Inform Dr. Chloe/Associate of the name and session date & time of new client.

**Step 8:** Inform Dr. Chloe/Associate if the client cancels or will be late to the session.

Note: IF a NEW client is scheduled with Dr. Chloe, a purple dot should be added to their profile as well in the event that Dr. Chloe ends up referring them to an associate. Additionally, if a client books with Dr. Chloe after having a free 15-min consult please leave the purple dot on their profile, again in the event that they are referred to an associate. The purple dot is to remain on the client’s profile until Dr. Chloe has had a chance to speak with the assigned associate regarding the client’s case.

\*\*Pls follow up with Dr. Chloe for actions that need to be taken within 30 minutes after the consult has ended

\*\*\*If no response, please follow up every 1-2 hours

Note: If a client says he/she is an old client and they have not been seen within the last **90 days** you must confirm the 5 points and fees. Please confirm they use the same insurance and reiterate our fees. You must also send a new Credit Card Agreement, Client Agreement & HIPAA, and Insurance Reimbursement Form (if applicable). If the CA&HIPPA, and CCA have been updated since then, they MUST sign both forms again.

For new clients with phone/video sessions, make sure forms are signed by the time of the DL for 5pts&fees

**If you are scheduling an appointment the day- client MUST be added to security list immediately**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  | before 10:45am | 11:00 AM | 10:45am - 5:00pm | after 5:00pm |
| If an appt is booked on a: | Monday | and the appt is on the following: | Tuesday | Office Assistant will add himself, no need to request | Office Assistant submits the guest list | Receptionist requests from All Staff | Receptionist adds ct herself |
| Tuesday | Wednesday |
| Wednesday | Thursday |
| Thursday | Friday |
| Friday | Saturday |
| Friday | Sunday |
| Friday | Monday |
| Sunday | Monday | Receptionist adds ct herself | | | |
| Monday | Tuesday | Receptionist adds ct herself | | | |
|  |  |  |  |  |  |  |  |
|  |  |  |  | before 10:45am | 11:00 AM | 10:45am - 5:00pm | after 5:00pm |
| If an appt is booked 2 days from today but tomorrow is a holiday |  |  |  | Office Assistant will add himself, no need to request | Office Assistant submits the guest list | Receptionist requests from All Staff | Receptionist adds ct herself |

If anyone mentions they want to apply the "Entrepreneur's Organization Discount" please give them $100 of first session with associates only. Request for Office Assistant to assign promo code “Entrepreneur's Organization Discount” to their profile.

**Confirmations Needed for 5 points:**

New Clients MUST confirm Fees and 5 Points before moving forward with their first appointment (free 15-minute consult or new client appointment)

Time deadlines for new clients to confirm 5 points and fees

ALL new clients including 15 minute consults, MUST have confirmed fees AND 5 points.

**1)** When we reach out to clients for the **first time**, you must give the client a **deadline** IF they are **holding an appointment on the books**. Note: A deadline is NOT needed if the client does not have an appointment booked.

**2)** The first email you send to them should **give a deadline** to respond by- a time frame that is **reasonable.** Subject line: **\*Time Sensitive\* Confirmation Needed by date/time.** Generally speaking, 24 hours is reasonable-- but you may need to use your judgement if the client is booked less than 24 hours away or for the next day, or some other special circumstance exists. \*NOTE: If a new client is booked for an appointment the following day, the DL given MUST be for the day prior.

(Set a G-cal event for yourself for time of deadline to remove appointment if no response from client)

Your note to client can say something like:Please confirm by (certain date and time) or we may need to cancel your appointment. I look forward to hearing from you soon! (include the fees and the 5 pts in body of email, or whichever is outstanding for them to confirm)

Note:

* Please indicate the deadline in the subject line of the email.
* Deadlines must be given on confirming 5 points/fees to anyone holding an appointment
* Deadlines must be noted on the appointment AND your g-calendar
* Keep your calendar open and watch for deadlines that occur during your shift. Update the deadline calendar event name by adding "DONE" plus your initials/time to the g-cal event name when done- ex: "DONE- JV 5:30pm"

**Before removing** a client's appointment because we have NOT received confirmation, the receptionist will:

1) Confirm it is the correct deadline that was emailed to the client.

2) Double check email history in reception account to ensure client has not responded.

3) Final step- canceling the appointment. If client is non-responsive to your efforts and deadlines to confirm 5 points and/or fees/insurance, then cancel their appointment in mindbody. Send them an email with subject line "Appointment at \_(time/date)\_Cancelled" apologizing that you had to cancel the appointment because you were unable to confirm whatever information was missing, offering to reschedule if they can reply to the email and confirm whatever information you needed (re-include the information in the cancellation email). Include a screenshot of your previous email(s) as well. CC management and reception.

# Purple Dot Policy update 1/12/2018

Note: When a new client is referred by Dr. Chloe to an associate for treatment following a session or a free 15 min phone consult with Dr. Chloe, a purple dot should be added to that client's profile. This purple dot is to remain on the client’s profile until it has been confirmed that Dr. Chloe has spoken with the assigned associate regarding the client’s case.   
  
The protocol for "purple dot clients" is as follows:  
  
1) Reception must notify Dr. Chloe and the associate when they have booked a purple dot client into an associate's schedule.   
  
2) Reception must locate a time in MB prior to the client's scheduled session with the associate for Dr. Chloe to discuss the client with the associate.   
  
3) Regular scans of the schedule for purple dot clients should be conducted by each therapist on their workdays, and by reception on the weekend and/or the associate's "off day(s)" to ensure all parties have discussed, or are scheduled to discuss, the purple dot client prior to the client's session with the associate.  
  
4) If Dr. Chloe or the associate are off work prior to the scheduled day of the session with the associate, reception must reach out to both parties by email first, followed by a text message, followed by a phone call. It is vital that reception receives a response from both parties; otherwise, reception should continue to "nudge" the therapist until contact is verified.

# Appropriate Phone Protocol

## A. When on call with non-client:

If on call with non-client and another call came in, inform them we need to put them on hold to take the other call or you may inform them we will call them back.

## B. Leaving Voicemails If you leave a voicemail for a client or potential client, please:

* Include your email in the voicemail in case they prefer to respond by email.
* Always follow-up with an email to the person regarding the reason for your call, if you have the person’s email address

## C. Returning Missed Calls

If you are returning a call to an existing client or to clients who have already a scheduled appointment with us, be sure to confirm first if you are talking to the actual client **before disclosing** that you are calling from Carmichael Psychology.

After returning a call to a missed call, be sure to respond to the missed call email alert, and CC Dr. Chloe, RM and other receptionist. This is to let the office know that someone called the number back. Indicate the reason the call was missed (if you were on the phone w/ a different ct, please also provide name of ct when possible, or explain that no name was available). Also, indicate further action taken.

When returning a call do not disclose where you are calling from if you reach someone that is not the client.

Etiquette Regarding Placing Calls to Clients

1. During weekdays we don’t initial phone calls to clients before 9AM. If a client called the office for example at 7AM and it was a missed call, please return the call immediately.
2. Calling clients on weekends - we don’t call clients before noon unless there’s a good reason
3. Always check MB first to see if the missed call is from a current client.
4. If someone calls and hangs up as soon as you pick up please call the person back immediately. Please email management to let us know that you received a hang up call and if you were able to get in contact with the person after calling back.
5. Please use your judgment when on phone with client and if you know the client purposefully hung up the phone, reception does NOT call the client back. You may assume the client is not interested in our services.

**Protocol for problematic incoming calls:**

Whenever a receptionist answers a call and the caller appears to be unresponsive or cannot hear or understand what receptionist is saying, receptionist should send an email with a subject line, "Possible technical problem" to Dr. Chloe & RM.

In body of email, a simple one sentence explanation (i.e. "I answered the call, but person hung up/kept saying 'hello?'/said they couldn't hear me").

Reception should call the client back immediately to try to successfully connect with the client. Even if after calling the client and there are no future communication problem, we need to make sure to send this email to alert management when Ring Central is malfunctioning.

## D. Client Running Late to Session

If a client calls in order to inform you they would like to cancel a session OR they will not be able to make the session on time **offer a video/phone session.**

## E. Talking to New Clients about Cost of Sessions

Talking about money can be a downer.  Always encourage client to give you insurance details, say something encouraging- “We’d be **happy** to look up your benefits for you and let you know how much we can get covered- we have a **great billing manager, she makes everything really simple**.  If you have your insurance card **handy** I’d be **happy** to **have her look up your benefits**”

**F. Missed calls from Ring Central**

If you happen to have a missed called during your shift, Ring Central will send you an email with the phone number of the missed call. Please call back the number.

Once you call back the number, you must reply to the missed call email and CC reception, Dr. Chloe & RM and explain:

1. Why the call was missed. If you were on the phone with another client during missed call, please indicate in your email the name of the client you were speaking with that caused you to miss the call.
2. What was the result of the callback(s). I.e. obtained insurance information, booked an appointment, etc.

# Protocol for Emailing

**Email Notes**

**1- Format for Emails**

When emailing a therapist regarding a booking or a cancel, please note that the format you should email should be the **day, date and time.** For example is a client cancels a session, the subject of the email should be “ *Client's first name, last initial canceled session on Monday, June 1st at 10am”*

**2- Client Information in Drafts**

Client information should never be in the same email thread as a draft. For example, if you are sending Dr. Chloe an update list for multiple client and are then asked to make a draft for one of the clients on that list, the draft should be created as a new email NOT as follow up email within the same thread or as a follow up email with a different subject line. Please do not make one email with multiple drafts.

Unless the client directly openly CC’s RM, reception is to ALWAYS BCC RM

**3- Add in when to notify clients when their therapists is unavailable**  ( In process)

When notifying clients that their therapist will be out of the office, please be sure to bold and underline the date the therapist will be out. Please also be sure to create a g-cal reminder for 24 hrs to report to the clients therapist the status of the client's response to their out of office notification.

## 

## A. Sending Documents to Clients

**NEVER** send a client a doc directly from **Google Drive**.

If therapist requests that a worksheet be emailed to a client, receptionist will download the document as a PDF and email to the client. NEVER forward an email from a therapist directly to a client and vice versa.

If a therapist requests for the same document to be sent to multiple clients, reception must email each client individually.

## B. Password Protecting Documents

1) If a therapist requests a document be sent to a client that includes confidential information or if a client requests invoices, the document must be uploaded to the Adobe Cloud and password protected. (Also including any client notes or receipts)  
 2) Once the document in password protected, then the document may be emailed to the client  
 3) Reception will ensure the client has previously received email indicating the PW for their documents.  
Note: When sending email to non-client (i.e another therapist/ physician of the client) DO NOT give client’s full first/last names.

**C. Forwarding emails from Clients to Staff Mgmt**

You must always forward emails from clients sent to the reception account to the RM. If an email is only sent to some of the parties mentioned, please forward it so that all parties mentioned are aware of the email.

# Protocol for Following up with Clients at Request of Therapist

To help us keep better track of reaching out to clients and making sure they're not drifting away, the following protocol will now be in effect moving forward.

**Follow these steps:**

1. Therapist requests reception to reach out to client to schedule appointment and/or call.
2. Receptionist reaches out to client CC’ing reception and BCC RM.
3. Receptionist plots on Google calendar a reminder for 24 hours later. \*Reminder MUST be during a receptionist shift. It is Okay to plot reminder slightly earlier or later than 24 hours so that it will fall during a receptionist shift. Name of reminder: “Client’s Name - 1st or 2nd R/O”
4. IF client responds within 24 hours, the reminder is deleted from Google calendar.
5. IF client does Not reply by the time of the reminder receptionist contacts therapist with update that no response has been received and asks therapist how to proceed with client. Subject line: "No response from (client name) re: appointment". Details in body of email. Email therapist, cc other receptionist along with the RM. \*If no response from therapist, reception follows up with therapist again next day and every day cc'ing other receptionist, the RM until a response is received from therapist re how to proceed.  
   \*\*For Dr. Chloe, always include context in F/U
6. IF therapist says to reach out again, repeat steps 1-5 until therapist or managers indicate no further follow-up is necessary

**Creating G-cal Reminders**

A g-cal reminder can be made for many reasons. Please see the instructions below on how to name each g-cal event depending on what the event is regarding . Please note a g-cal event should NEVER be removed. If you have taken care of a g-cal task please mark the event as “DONE” and if a task is no longer needed, please mark the event as “OBSOLETE” . You will need to place your initials after each. It is the responsibility of the receptionist on duty at the time of the g-cal to update the event.

* A therapist asked you to reach out to a client to help schedule their next session - **“ 24 hour f/u with \_\_\_\_\_ regarding reachout sent to \_\_\_\_”**
* A therapist asks you to send a drifter email -” **24 hour f/u with \_\_\_ reg drifter sent to \_\_\_\_”**
* A deadline for 5 points and fees - **“ DL for 5pts and fees for \_\_\_\_\_”**
* A deadline given to a client for a waiver - “ **DL for \_\_\_ reg waiver”**
* Reminder to send forms to a client - **“ Send \_\_\_ to client if not signed”**
* Reminder to alert therapist to collect forms from a client- “ **Remind \_\_\_ to collect \_\_\_\_ from \_\_\_”**

**Existing Client Emails they want to Discontinue sessions**

1) First and foremost alert ct’s therapist, Dr. Chloe & RM IMMEDIATELY re: this request and wait for feedback with Subject: “ATTN Dr. Chloe: (Ct name) Discontinuing”  
-include history (Ct since\_\_\_\_\_\_\_; has had \_\_# of sessions\_\_)

-suggestions on next steps

2) do NOT respond to the client until provided with direction on what to send

The reason for this is that Dr. Chloe would most likely like to check-in with the client to see if they have been happy with their sessions and if they're not, give them the opportunity to switch to another associate.

**Calling Insurance Companies**

Note: Insurance companies are closed on the weekends and are open 9:00AM- 5:00PM EDT Monday - Friday

When calling an insurance company, you need to get to member services. You will tell them you are calling from a provider's office and you need to verify Out-of-Network benefits for outpatient mental health or behavioral health services. When they quote you back make sure they say deductible and or the word Coinsurance. If they say Copay they are quoting you in-network coverage and that is NOT what you need.

1. They will ask your name and who are you with. Say your name and "Carmichael Psychology"

2. They will ask for our Tax ID or our NPI

sometimes they will ask to verify our business address:

3. Tell them you need to verify out-of-network benefits for outpatient behavioral health or mental health services.

4. They will ask for: Patient Name, DOB, Member ID, and occasionally address (if you don’t have the address, just let the representative know & usually they will still provide you with the benefits)

5. You need to collect the following information from the representative:

A. Deductible amount and has any of it been met? How much?

B. Coinsurance - 80/20 or 70/30

C. Out of Pocket maximum and has any of it been met? How much?

D. How many visits are allowed per calendar year or is it unlimited?

6. Then send an email to Carmichael Psychology team noting the client's benefits

**Example:**

OON 70/30 Ded 500/250 Met OOP 2000/0 Met

When you receive information such as above with No Deductible and No Coinsurance, you need to ask the representative how much insurance will cover per session. The rep will most likely ask you for CPT codes, and the 2 codes you need to give are: 90791 and 90834. You will then need to report to us below (just an example)  
  
Insurance will cover:  
90791 - $85 per session  
90834 - $65 per session  
  
If the rep is NOT able to provide you with how much they will cover, then you need to let us know that information as well. Such as:  
"I asked the rep how much they will cover for 90791 and 90834 and they could not disclose the amount."

\*\*Always collect a reference number for the call.\*\*

**Hints for Member ID’s:**

For insurance benefits, there are many ways to know the company by just the ID # given by the clients. Please see the hints below.

**BCBS-** Begins with 3 letters and/or the name of the coverage starts with the word "Blue" which is part of the name "Blue Cross Blue Shield"

**Aetna**- Begins with the letter W

**Cigna -** Begins with the letter U

**Oxford and UHC-** Only # in the ID, no letters are included

**Mindbody (MB)**

## Documentation in MB

### Insurance tab section

ALWAYS include Policy Number (with no spaces and no dashes in between numbers or letters)

### Appointment Notes Section

For new client sessions or 15-min consults, make sure to note if a client has confirmed the 5 pts and fees, deadlines and if insurance and fees are documented in the client’s profile. If the client is a new in office client, you must also note if the directions were emailed to them. You must place your initials and the date you input each note.

**Example**: **For a NEW in-office client**

Sent fees and 5 points-DL 2pm on 1/15 -KH 1/13

Ins and fees doc’d in profile-KH 1/13

Direction email sent -KH 1/13

Do **NOT** include fees in the appointment notes

IF client has booked an initial appointment, you must note that directions have been emailed to the client.

**Example**: sent directions email KH 8.25.16

Do **NOT** place these notes on the appointment UNTIL the email has been actually sent to the client.

### Client Notes

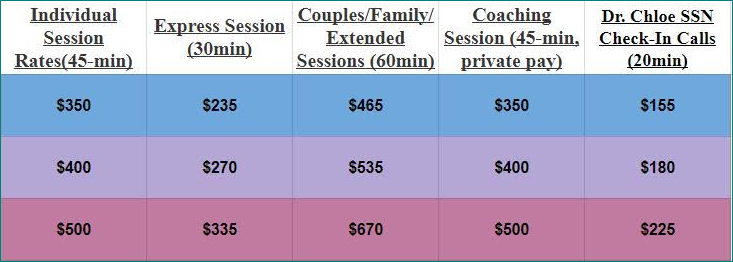
* + Please put your initials followed by the date you enter the note on MB for both new clients and for existing clients anytime you add a note. This includes notes for video and phone sessions as well.
  + For session notes, please place your initials AND the date after each line of the note

Example:

* + - * Confirmed 5 points and fees GJ 11/15/16
      * Sent directions email GJ 11/15/16
      * Ins fees doc’d in profile GJ 11/15/16

1.) ALWAYS put client’s insurance coverage and rates and standard fees.

\*\*Dr. Chloe’s different fees (will insert link to SS once completed)



**Example:**

*1.19.17 KH*

*OON 70/30 Ded 1,000 OOP 5,000*

*Standard fee: $500 per 45 min session w/ Dr. Chloe; $250 per 45 min session w/ associate*

*Ct owes: $500 per 45 min session w/ Dr. Chloe until Ded is met; $90/session thereafter*

*Ct owes: $200 per 45 min session w/ associate until Ded is met; $75/session thereafter*

*1.19.17 KH*

*NO OON*

*Standard fee: $500 per 60 min session w/ Dr. Chloe; $250 per 60 min session w/ associate*

*Ct owes: $500 per 60 min session w/ Dr .Chloe*

*Ct owes: $250 per 60 min session w/ associate*

When a client updates insurance information throughout the year (i.e. new insurance or deductible met) you must document **at the top of that calendar year.** Note should look like:

-------------------------------------------------------------------------------------------------

*1.19.17 KH*

*OON 70/30 Ded 1,000 OOP 5,000*

*Standard fee: $500 per 45 min session w/ Dr. Chloe; $250 per 45 min session w/ associate*

*Ct owes: $500 per 45 min session w/ Dr. Chloe until Ded is met; $90/session thereafter*

*Ct owes: $200 per 45 min session w/ associate until Ded is met; $75/session thereafter*

*\*\*\*DED MET 11.01.17 Ct owes $90 per 45 min session with Dr. Chloe*

*Ct owes $75 per 45 min session with associate \*\*\*\*\*\**

\*Note: Any time fees are updated in a client’s profile in MB, it is the responsibility of that receptionist to email a screen shot of the updated fees to the Practice Manager.

2.) If client has Beacon Health or BCBS, be sure to include that client owes all checks received from insurance.

3.) For insurance companies that we do not typically use, there needs to be notation in the notes section of the client's profile notes the phone number for the insurance company, in addition to the address where the Biller can send claims.

### Alerts tab on Profile Section

- Make sure to put notes on what forms that the client needs to sign, also include if client has signed the forms.  
- **Alerts needed for partner in a couple session :** HK and “no ins for indv session”.

**Example :** NEED CA&HIPAA, CCA and IR Form GJ 3.22.17

**Please note we only send Insurance Reimbursement form (IR) to clients that have Beacon Health or BCBS**

**Appointment Buffer Times**

**Associates (5 minute buffer for sessions; does not include free 15 min consults)**

15-min consult- Booked for 15min

20- min check in call - Booked for 25 min

30-min session- Booked for 35min

45-min session- Booked for 50min

60-min session- Booked for 65min

**Dr. Chloe (10 minute buffer for sessions; does not include free 15 min consults)**

15-min consult- Booked for 20min

30min session- Booked for 40min

45min session- Booked for 55min

60min session- Booked for 70min

## Late Cancel Calendar

There will be two calendars for each therapist, one is for clients and the other is for non-therapy appointments named LC. The LC calendar is for staff use only and will not be available for clients to book an appointment. Whenever you add availability to the clinical calendar, the LC calendar must be edited to match the times.

The LC calendar allows us to book appointments for associates while still providing those hours for clients to book. Whenever the associates have a non-therapy based appointment please book these appointments in the LC calendar under their name. **If a client books an appointment while the associate is scheduled for a LC calendar appointment please cancel the LC calendar appointment and let the associate know immediately**. Clients will always take priority.

Note: Non-therapy sessions should not be entered as client appointments

Types of appointments that are booked in the LC calendar.

* Associate Consultations
* Non-therapy session
* Staff meeting
* Case Conferences
* Interviews \*\*
* Client Late Cancels/ No Show\*\*\*

*If a therapist is out of the office for the day please block it out on BOTH the clinical and LC calendar*

## Notes for Video/Phone Sessions in MB:

ALL video/phone sessions in MB MUST have notes in the appointment notes section indicating how the session is occurring.

**Phone Documentation**:

* Conference line and code
* Indicate ‘Consult line’ if the client will be calling the consult line

**Zoom Documentation:**

* Username of Account
* Password of Account
* Name of Video
* Link to the Video
* Password for the video
* Video ID

**Skype Documentation:**

* Indicate Client’s Skype ID and note it is a skype session.
* Skype Account and PW that the therapist will use ( All therapist other than Dr. Chloe)

## Adding purple dot:

1. Go to 'Retail'
2. Search for client's name
3. If an Item is already available then click 'Look up item'. If there's none then proceed with the next step.
4. On left side, click 'Comp/Guest
5. Lastly, click 'Save No Receipt'

Note: When adding purple dot, please don’t process it as you booked the appt. It should be done separately so you won’t have a problem removing the purple dot.

## Removing purple dot:

1. Go to client's profile then go to 'Purchases'
2. On the right side of 'Therapist Speak w/ Chloe first' item. Click 'Return/Void'
3. Click 'Void'
4. Then 'Yes, Void This Sale'

## Marking Dr. Chloe’s clients “Arrived”

The receptionist on-duty at the time of the appointment is responsible for marking Dr. Chloe’s clients arrived in MB. Receptionist must mark all clients arrived, including any LC/NS’s.

## Contact Logs In MB

1) Go to client's profile  
2) Select Contact Log  
3) Select box 'Outreach' - this will refer to times when you reach out to a client to have them sign docs, to schedule ct their next appt, when you've reached out to ct's previous provider to schedule call for one of our therapists to coordinate care, etc  
4) Enter in a date for Follow-up  
5) Assigned to -> who do you want to assign this message to? You can assign to yourself as a reminder, or if you need the other receptionist to take care of once your shift is over, please assign to her.  
6) In the notes section an example of what you would document is: "JV emailed/LVM w/ ct 4.2.16 5:45pm to complete CA, CCA, and Ins Reimbursement." "JV spoke w/ ct 4.3.16 and ct confirmed he will fill forms out in the office."  
7) Select Add

**Changing a Therapist to Unavailable in MB:**

If a therapist is going on vacation, or for some other reason is unavailable for a certain day/time, please do the steps below. Do NOT mark a therapist unavailable just because the therapist asks. If a therapist asks, alert management of the request and ask if it’s approved.

1) Go to Appointments tab on MB  
2) Look for the date and the therapist you need to block the scheduled with.   
3) Click the date, and choose the "unavailable" option.  
4) A pop up box will appear and you need to put the reason for the "unavailable" status. For example, "(Name of associate) will be out of the office"  
5) Edit the starting and end time  
6) Click Save

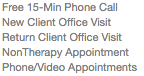
**Blocking out Therapist’s Schedule**

Please block out the therapist's' schedule in MB for the following day the night before IF there are no clients scheduled with the notation: “Unavailable per night-before blockout - RG 1.1.17”

Mon - Thurs at 8:45pm - block the following morning 7am - 7:50am

Fri at 5pm - block Sun morning 9am - 9:50am

Sun 6:45pm - block Mon morning 7am - 7:50am

**Adding Availability in Mindbody**  
  
When adding availability to Mindbody, please be sure to check the types of sessions you are making the therapist available for. If booking on the LC calendar, the only session available should be **non-therapy** session. If booking on the clinical calender the only sessions available should be the ones listed below. Please note, **Group Therapy** sessions should **not be visible** to clients unless it is requested by management.   
  
When adding availability, please be sure that the LC calendar is NOT visible to clients, but the clinical calendar IS visible to clients. By making the clinical calender visible to clients, they are able to self book sessions via the Mindbody app or website.

**Protocol for same-day sessions or consults for Dr. Chloe**

If you book a same-day appointment with Dr. Chloe (an interview, call, session or 15-min consult) you need to notify Dr. Chloe Immediately. Please email her with the information of the booking with the subject line "URGENT" AND chat her on google hangout. Please also ask Personal Assistant to text as well as give Dr. Chloe a call. Please try a few times until you get confirmation that Dr. Chloe is aware of the addition.

If a same-day client changes the session type (from in-office to video or phone or vice versa) or cancels the session/consult altogether, please chat and email Dr. Chloe to let her know the change in the session with the subject line “ATTN” . Please be sure you get a confirmation from her.

**Scheduling outside of Dr. Chloe’s “normal” clinical hours**

If you open up availability outside of Dr. Chloe’s normal working hours or if a client books outside of normal working hours, alert the personal assistant to check conflicts in Dr Chloe's personal calendar.

If a client requests an in-office session, but there is a lack of availability in Dr. Chloe's schedule please ask Dr. Chloe if she would like to extend her Monday or Wednesday schedule to accommodate the client. When offering to extend Dr. Chloe's schedule, you will need to email her with suggested times and CC Chloe’s personal assistant to ensure Dr. Chloe does not have any conflicts for the proposed times. Please be sure the times you are suggesting are ok based on the clinical and personal calendar. You must email the suggested times to Dr. Chloe with the subject line "**ATTN DR. CHLOE"** and reply on the thread every hour until Dr. Chloe confirms the schedule.

**T/Th/Fri -** If Dr. Chloe plans to be in the office for an interview for example, please email to confirm if Dr. Chloe is available to offer any in-office sessions to see clients.

When emailing a client with Dr. Chloe's times, please note you must inform the client that we have added them to the waitlist and will alert them of any changes in Dr. Chloe's calendar in the event that the time they are requesting is not available. Please also include the option to book a session in advance so that they can secure a day and time that works for them.

If a client who is booked past Dr. Chloe’s normal clinical times cancels the session, please check with Dr. Chloe first if she would still like to offer the same availability to clients on the waitlist. You must immediately remove the extended availability from the MB calendar as soon as the client cancels and wait till approval from Dr. Chloe to offer that spot to clients on the waitlist.

**Error When Trying to Change/Modify an Appointment in MB:**

1) Click on the appt

2) Select Modify

3) In the upper right-hand corner you will see blue box for "Update and Close" - click on it

4) Now you can change the appt type, time, etc.

# Scheduling a client via Zoom

ALL Zoom sessions MUST be scheduled as a recurring appointment - NOT a one-time appointment.

For Dr. Chloe’s clients, please schedule them in Dr. Chloe’s account. For all of the associates’ clients, please schedule them in their own

IF you must create a new Zoom appointment for a client, please be sure to keep the PW the same as was originally provided to the client. IF we must change the PW, please be sure to spell it out to the client that the PW has been updated.  
  
For someone to enter the meeting and be required to enter a PW, they must be sent the link that does NOT have the access already enabled in the link, meaning that everything after and including the "?" needs to be removed.

**Client Name Change**

If a client alerts you of a name change, please be sure to update their name in Mindbody.  
  
If you notice that the client is booked for the next day, you must also update the guest list so that the client is not denied when entering the building.

You must reach out to the support staff and alert them that the client has a new updated name and ask for the name to be updated in Office Ally. If the name is not updated in Office Ally, the biller is not able to bill the client for the session.  
  
**Assigning Client Relationships**

Please note the relationship for all clients who are booked for family sessions, couples sessions or were referred by another client in the practice. You can do this by going into MB for a client and clicking on the tab labeled “Relationship”.

**Breakthrough**

Clients will message us directly from Breakthrough. Please respond to them accordingly so that we can get them in the books and send them fees and 5 points. Please ask for an email so that we can respond to them via email and not Breakthrough.

**Protocol for ZocDoc Clients**

Zocdoc is to be checked daily by reception to check that the times mentioned in ZocDoc correspond to the times mentioned on Mindbody. There may be a few times when the ZD calendar does not read the MB calender accurately which causes unavailable times to be shown on ZD for potential clients to book. When a ZD client books a session, an email will be sent to you to alert you about the booking. You must follow the steps below.

1) **Immediately** login to Zoc Doc account and confirm the appointment (login info on PW SS). If we do not confirm an appointment within a certain time frame, ZocDoc will delete the appt and we do not want this to happen. Let Chloe and rest of office staff know the client is being taken care of by **sending a screenshot** showing that appt is confirmed. Please send the SS to RM, Dr. Chloe and both reception accounts.

2) Create profile in MB for the client

3) Schedule the client in MB for whatever day/time they booked - in the notes section indicated client is ZocDoc client

4) Look-up insurance benefits if available

5) Reach out to client regarding fees, 5 pts, directions to the office

6) Send necessary docs from EchoSign and place alerts in MB

7) BEFORE canceling a ZocDoc appointment due to no response from the client, please PHONE the client.

8) If you cancel a session on ZocDoc because a client asked to cancel the session please email **service@zocdoc.com** and indicate the date and time of the appointment (do not include the name of the client) and that the session was canceled due to the client wanting to change the session.

# Cost

**Important Note:** When conveying benefits and rates to clients, we should omit using 'for the year' and just say your 'deductible has been met' or ‘you have X remaining of your deductible’. Please note for some plans, the deductible will reset during the year, so it would be confusing to let the client know their deductible has been met for the year, if it ends up re-setting in say June.

**Note:** If fees were conveyed verbally over the phone and they confirm, an email also needs to be sent to the client immediately thereafter, something like "Thank you for taking the time to speak with me earlier. For your records, please see below for your coverage and the fees we can offer you."

We MUST have a paper trail on file for ALL clients. We don't want a client coming back to us and saying 'Well that's not how it was explained over the phone.'

If a new client scheduled an appointment and he refused to provide email address- Let them know that appointment isn't confirmed till we verify their phone number was correct by calling back and having them pick up.

If a client requests a Spanish-speaking appointment with Dr Chloe- Inform client Dr Chloe does speak a fair amount of Spanish, but they must speak English well enough to have a basic conversation. Also, they must book first a 15-minute consult with Dr. Chloe to confirm there will be no language barriers before booking an office visit.

## 

## Fees with Insurance

### Individual Express Therapy- 30 mins

Dr. Chloe: $235 for all visits

Associates: standard fee for a 30 min session is $165, as they are meeting their DED they owe $135

### Individual Therapy- 45 mins

Dr. Chloe: $500 for all visits

Associates: standard fee for a 45 min session is $250, as they are meeting their DED they owe $200

### Individual Extended/Couples/Family Therapy- 60 mins

Dr. Chloe - $465 for all visits

Associates -If they're using insurance, the standard fee for a 60 min session is $300, as they are meeting their DED they owe $250.

If they have **NO insurance,** standard fee w/ associate is $250 for 60 min session, $200 for 45 min session and $135 for a 30 min session.

# EchoSign

IF a client has self-scheduled an in-office visit, OR you have booked them an in-office appointment please send them immediately a CCA and CA from Echosign and note alerts in MB. \*Alerts in MB should NOT be noted until emails to client are actually sent.\*

IF this is a coaching client then they are to be sent a Coaching Agreement and CCA and note alerts in MB. If a client books a **Birthday Session**, please note that a Coaching Agreement needs to be signed by the client.

IF the client has BCBS/ Beacon Health insurance you MUST also send them an Ins Reimbursement form via Echosign and note alert in MB.

When we send Consent to Release form to client, a follow up email needs to be sent immediately.

**Please note that in sending docs in echosign, it MUST be sent ONE at a time. Echosign will give you the option to send multiple docs at once, but it doesn’t actually send the additional docs- so please send them ONE AT A TIME.**

1) After you have emailed documents from EchoSign to a new client, place a g-cal reminder for 24 hours prior to client's first appointment to reach out to client to remind them to complete necessary Echosign docs. Ex: "John O - Reminder for docs: CA&HIPAA, CCA, IR"

2) IF client has already completed the docs - update g-cal reminder to say "Docs Completed"

3) IF client has not completed the docs - update g-cal reminder with your initials to say "Remind client to complete docs - JV"

4) 2 email reminders should be sent to new clients regarding completing documents prior to their first session (if they schedule same-day appointment, then 2 email reminders may not be feasible); use your judgment

It will be the receptionist's responsibility whomever is on shift at the time of the g-cal reminder to complete this task. \*Reminder to place g-cal reminders for times when a receptionist will be on duty\*

# Notes for Scheduling Appointments

Please note that anytime a client says they need to miss an appt that will result in an LC for a reason that seems like it could be solved by switching to a phone/video (like being sick and needing to stay home) we want you to offer them a switch to phone/video

## Emailing Therapists re Appointments

Any time a client books or cancels an appointment the client’s therapist must be notified immediately via email. If the client self-schedules or self-cancels, the therapist must still be alerted.

If client provides reason for scheduling or cancelling appointment with therapist, please relay this information to the therapist. NEVER forward an email from a client directly to a therapist. Instead, you may copy and paste the client’s note to the therapist.

Never include the full client’s name. You may include first name and last initial.

**Same day booking or cancel-** You must alert the therapist as soon as a session is booked or canceled for the same day (15 minutes max allowed).

**The session is more than 1 day away-** you are allowed 1 hour from the booking/cancel of a session to alert the therapist. This is to give you time to prioritize time sensitive emails, deadlines and calls. If no action is taken within an hour, we will assume that the booking/cancel was ignored or forgotten about.

## Scheduling a check-in call for client with Dr. Chloe (Tuesdays ONLY)

When we book a check-in call for the client, be sure to put on appointment notes on how will Dr. Chloe contact the client. If it will be via phone, include the phone number of client.

**If client has met DED- calculate price according to Insurance coverage**

**If client has NOT met DED- $155 standard fee. 1st call is at no OOP fee to the client, but we will still bill insurance**

You will need to note the cost of the session in the client's profile notes.

\*\*If ct self books on a Monday or Wednesday, R/O to ct to R/S to a Tuesday

## Self-schedule Phone/Video Appointment

Receptionist must confirm first the location of the client, if he/she is located in NY, Maryland or VA. If client is located in a state where Dr. Chloe is not licensed, clarify to the client that Dr. Chloe is not able to provide therapy, but can offer coaching and coaching is not reimbursable by insurance.

## Appointment Lengths for Clients

When clients self schedule an appointment that seems out of the ordinary, please follow steps below. This is to make sure client won’t end up coming in for a session and not being aware of the fees, when perhaps they booked this appt length in error.

1. Ask yourself if this client has ever had this type of appointment before
2. Look at client's visit history and profile notes for fees
3. IF this is client's first session with this kind of appt type, then the client needs to be notified **IMMEDIATELY** of the fees they are responsible for (please reach out to RM if you are unsure of what the client owes)

## Scheduling a New Couples/Family Appointment in MB

1) The recognized client (whose insurance we are using) MUST be listed FIRST in MB and include the note in the appointment notes that reads: “Bill Under” and ALL following appointments must continue to be booked in this fashion UNLESS the partner says that he/she will be using their insurance, at which point you will swap them and you will need to update client’s profile with his insurance info and fees. To book a couples session, you must also get the name, email address and DOB of the partner to properly book the session on MB.

2) In the profile notes of the partner, we MUST include something like "Partner of Jane Doe. Sessions will be billed under Jane Doe"

3) When you email a therapist about a new couples/family session, YOU MUST include the relationship of those who will be in the session as well as note it in the session notes. For example:

Family Session- John D. (Father) and Jane D. (Mother) Julia D. (daughter)

Couples Session - John D. (engaged to) Jane D.

As soon as you create that profile for the 2nd person of the couple, you will then Immediately place an alert on their profile (same place for doc alerts) that says: **No INDV info for billing**

This means if we see this alert AND the client is scheduled for an individual session, we need to reach out to that client BEFORE their individual session and get billing info on file.Once the billing info is collected, you may REMOVE the alert as it is no longer relevant.

## Existing clients moving to an online session

Any current clients that have been established as psychotherapy clients and request to move to an online session we HAVE to:

1) CONFIRM the client will still be within the state of New York during the session

IF they are NOT in NY for the online session then: 1) we CANNOT bill insurance and 2) this makes them a coaching client - and the client needs to be aware of this, as well as the therapist. Please take the steps needed for a coaching client.

**Protocol for Booking a Recurring Appointment**

1) Select the option to book a recurring appointment.

2) After you have clicked on the button "Check for un-available Dates" please take a screenshot of the next screen showing that either all dates are available or any dates that are not available. Email this screenshot to Reception Manager.

3) For ALL dates NOT available place g-cal reminder 2 weeks prior to the unavailable date as an indication to reach out to the client regarding the unavailable date. Take a screenshot of ALL g-cal reminders placed and email to RM. If all dates are available and no g-cal events are needed, please email a confirmation to RM confirming all dates were booked.

\*\*NOTE\*\* When a therapist asks to cancel a day where sessions are already booked, you will reach out to those clients that SAME DAY. Do not wait till 2 weeks prior to the appointment. These need to be handled as they are received. But also create a gcal reminder to R/O to the ct 2 weeks prior if the ct still does not have an appointment on the books.

4) Click on "Book Recurring Appointment" in MB to make the reservation.

## Excessive Cancellations for Client Holding Recurring Appt

If a client is holding a weekly reservation, the Client Agreement states they will maintain 92% attendance rate. If their attendance falls below that, the therapist can either speak directly to the client in session or request that the office send the client an email. Office Assistant will run a report calculating the client’s attendance rate.

General rule of thumb: ask the client to attend the next 7 out of 8 sessions to increase their attendance rate.

When email is sent to the client regarding their poor attendance, please make a note in the client’s MB profile indicating client was warned about their attendance.

## 

## Old Clients Returning to Practice

When a client returns to the practice that hasn't been seen for quite some time (**3+ months)** we need to confirm their insurance info and fees. If the fees they were previously paying are lower than what our standard rates are now, please bring to the attention of RM first to confirm rates Before emailing the client.  
  
Please ALWAYS refer to previous notes in MB for what they were paying last time they were here. We are not necessarily going to continue with their previous fees, especially if they were paying less than our standard fees now, but it is good for us to have a reference for what was going on with them.

**Scheduling Clients Same-Day**

If a client wants to schedule an appointment for the same day, please consult MB first before confirming the appointment with the client and ensure that the therapist will be at the office. ALL therapists must be provided with at least **2 hours** notice to get to the office for same-day bookings if they are not already planning on being at the office.

\*\*For rescheduling cts same-day, inform them that this is a one-time courtesy and that they will be charged moving forward.

Note in MB: 2.20.18 RG Ct asked to be r/s, fee was waived, no waiver moving forward

# Protocol for Appointment Cancellations

All appointments -> 24 hours notice required for cancellations or appointment changes

The therapist must be alerted immediately to any appointment cancellations the therapist themselves did not cancel. Clients should be offered rescheduling options and Reception has to update the therapist daily until the client responds or until the therapist provides further directions.

-IF client provides appropriate amount of time to cancel their appointment, 'Early Cancel' in Mindbody. Reply to their email, thank them for their note and confirm their appointment has been cancelled. Offer to reschedule the appointment for later on in the week if they have a recurring appointment, OR if no future appointment is scheduled, please offer to find another day and time that works well for them.

- If a client self cancels a session, please always f/u with them with a confirmation of the cancel as well as other times they can reschedule the session. Please be sure to always offer phone a video sessions.

-IF client DOES NOT provide enough time within the policy for canceling their appointment:

1. Early cancel the appointment in the therapist’s regular calendar. Select “No do not send an email.”
2. Book in the therapist’s LC calendar. Add session notes for therapist wait time. (Increments of 15mins)
3. Add profile notes
4. Inform the therapist about the cancellation and if the fee was waived or charged (if the ct included a reason, pass it along to the therapist)
5. Inform Biller about the LC
6. **DO NOT DELETE OR EARLY CANCEL ANY APPOINTMENT THAT WAS ACTUALLY LATE CANCELLED.**

-IF client calls in that is not within the time frame of the cancellation policy and they want to change the time of their appointment to later or earlier that same day, the receptionist should make sure that the client understands our cancellation policy moving forward. It is OKAY to go ahead and make the schedule change IF the therapist has the time. Receptionist should also make sure to send a follow-up email (below) to the client reiterating cancellation policy and asking the client to confirm they understand the policy.

-For No Shows and Late Cancels, before responding back to the client's email, please check client's profile notes in Mindbody for any notes pertaining to previous late cancels and also check ALL of client’s previous sessions. IF client already has been provided with a courtesy waiver then they WILL be charged full fee (1 waiver every 6 months),: “Thank you for your email. Please note that you will be charged full for the session for today’s (late cancel or no show).”

-IF client has NOT had a waiver or their last waiver was 6 months ago or prior, respond to their email/call with the LC template.

Note: Reception MUST use judgement before sending the late cancel template. For example, if someone lc's because of a family emergency, we want to alter the wording (not say "we understand things come up" to someone who has just had their Dad go into surgery).

You MUST make a note of this in MB that the late fee was waived as well as when they are eligible for the next waiver (+6 months to the date of first waiver). Include the date of the appointment and your initials.

If we have not heard from the client that they need to cancel their appointment and thus we are expecting the client: Reception does NOT change appointment in MB to a LC UNTIL they receive confirmation from the therapist the client indeed did not show for the appointment.

Examples for noting in MB:

**If a client was a no show/ late cancel with a Waiver**

**GJ 8.03.16 Client was no show/late cancel ; Fee was waived; No waiver until 2.03.16**

**W/O a Waiver**

**GJ 8.03.16 Client was a no show/ late cancel: Charged full fee of $\_\_\_\_ for a \_\_\_min session**

Email Biller (CC other receptionist, the & RM) indicating if client is to be charged or if fee is waived. **\*\*Reception MUST include the amount of LC fee.\*\***

It is very important to spell out our policy to them whenever they late cancel or no-show, so the client can’t say they were not aware of the policy the 2nd time they late cancel or no-show.

\*Appointment scheduled with 24 hours and then late canceled - we are still always authorized to exercise our policy. Example: client books an appt within next 3 hours and therapist has to return to the office for the appt. Client then cancels appt 1 hour later. We will exercise the late cancelation policy in this situation

* there may be situations that may require a manager's judgement or approval, so Reception should always check.

**Indicating Wait Time in Mindbody**

If a client is a no show or a late cancel to a session, and they are due for a waiver you must indicate in the session notes in MB how long the therapist was waiting for the client until they were informed of the NS/LC. For example, if a client is a NS for a 45-min session starting at 1:00pm, and alerts Reception at 1:30pm that they can no longer make it to the 1:00pm session, the wait time to note would be 30 min. If the client is a no show and does not email Reception at all, the wait time to note is 45-min. \*\*Note: Wait time + time client actually seen in session should NOT exceed time original appointment was scheduled for.

# Protocol for No-Show Clients

1. Phone the client once. This is to check to see if they are just stuck at security or if they will be attending their session. If no answer proceed to step 2.

2. Follow-up with a friendly email that we’re expecting them for their scheduled appointment and also inviting them to reach out to us if they have any confusion. (Please note: No need to mention on the first email the cancellation policy. Only when client responds to your first email and they want to reschedule.)

***\*\*If a client is late and lets you know, offer to have the in-office session switched to a phone consultation via the Associate line and provide the extension number for the associate. Please alert the therapist immediately of the change in session\*\****

**For clients of Dr. Chloe, she will call them on the number provided in MB**

*If the session is a couples session, please give them the number to the international line and alert the therapist/Dr. Chloe with the new number change.*

## Some phrases you can use:

- I would be happy to let your therapist know that you going to run a little bit late.

- We want to make sure you get to use the full session time that you booked ***so***

***may I offer you the option to you start your session now over the phone.***

- We cannot guarantee that you will be able to speak to ---- for the full session time that you originally booked.

**If they say YES**

- I would be happy to provide you with a phone and extension number to reach your therapist. Do you happen to have something to write down the number.

- I will also send you an email with the number for your reference.

**If they say NO**

- I will be happy to relay your message to your -------- , and ------ will be waiting in the 10th floor lobby of the building.

**Protocol for No-Show New Client's- First Session**

* If a new client no-shows for their first appointment and we receive no contact from them, it is not necessary to send the billing policy.
  + Place a note in client’s MB profile notes indicating client was a no-show, the date of eligibility for next waiver and that client will need to be sent the billing policy if they want to book another session.
  + Alert should be placed as well that billing policy needs to be sent to client if they want to book another session.
* If the client reaches out to the office to reschedule, then the office will send the client the billing policy at that time.
* If a new client who is booked for an in office session and we do NOT have a CCA on file for them, then they may NOT have another session until a CCA is received.
  + Place a note in their MB profile notes and in alerts that the client MUST sign a CCA before their next session. If client does not sign the CCA by the deadline, please cancel the session.
  + The office may provide the client with a deadline to complete the CCA by in order to keep their rescheduled appointment on the books, or we will cancel the appointment if not received.

**Example for notes:**

3.30.17 KH Client was a No Show on \_\_\_\_, fee was waived

Add Alert: DO NOT BOOK UNTIL CT SIGNS CCA

# Client Significantly Late to Session

If a client is late to a session, but was still able to be seen by the therapist, we will note it on BOTH the calendar notes as well as the MB profile notes.

The session will be billed to insurance for how long the client was in the office, the client will be responsible for the cost of the length of time they were late.

Email Biller alerting her of how late the client was, how long the original session was, and how long the client was seen.

## Client Arrives Early and is waiting for the Therapist

If a client arrives early to a session and the therapist is with another client, these are the things you must do in order to alert the therapist that the client arrived:

1- **CHAT** the therapist on google hangout that the client is here.

2- If the therapist is NOT in another session and does not see your chat, **CALL** the therapist to let them know that the next client has arrived. Please leave a voicemail if the therapist does not pick up.

3- **EMAIL** the therapist that the client has arrived. Please CC Dr. Chloe & RM

# Anxiety Tools

If a new client inquiries about anxiety tools, please provide them with the link <https://anxietytools.com/home> and let them know any of our therapists would be happy to implement the webinar throughout the course of individual sessions.

Active clients are allowed access to anxietytools.com free of charge. They will need to pay for the service up front, and then we need to issue the client a refund. Direct Office Assistant to issue the refund.

Hourly Scans

1) Scan MB for the next 7 days for any surprise clients. **Surprise clients** are new or existing clients who have booked an appointment in MB without the help of reception. In your hourly scans please make sure to note both types of clients.

In appropriate cell of your daily task list, Enter count AND NAMES of new clients who did NOT appear on the Daily Insurance Schedule. In Hourly Scan - continue highlighting the update time. When a surprise client appears, add in subject line - NEW ADD'N.

2) Count how many appointments for the day then include it on your hourly report. If a new appointment has been added. Find out which client that recently booked then immediately add the client to the security list and then email the therapist.

3) Check non-therapy appts that were booked to reserve a spot for a client. If the set deadline has passed, remove the non therapy appointment, then include on your hourly scan report on how many non-therapy appointments you have removed.

**Steps needed to be taken**

1- Alert the therapist of any client bookings the therapist themselves did not book

2- If the client is booked for the same day, they need to be added to the security list, if the client is booked for the next day and the security list is already submitted you must request that the client is added to the security list for the next day.

**Security List**

Every afternoon the personal assistant will call the building front desk or security by 4:30PM to confirm the current days after hours client. Ex: 7.14.15 - you would call and verify the after hours list for 7.14.15 NOT the following day clients**.** It is the responsibility of the receptionist on duty to Reply All to the email confirming all of the clients on the list are correct.

**ENTERING CLIENTS INTO THE SECURITY LIST**

\* You will find a step by step guide with screenshots at the links below

7AM-7PM Clients After Hours Clients

On Friday, the personal assistant will call the building front desk or security to confirm ALL clients scheduled for in-office appointments on Saturday and Sunday. It is the responsibility of the receptionist on duty to Reply All to the email confirming all of the clients on the list are correct.

**If you are scheduling an appointment for that day- client MUST be added to security list immediately. Receptionist will chat on All Staff request for client to be added to security list.**

If a client is booked after 10:40am for an appointment the immediate following day, reception will be responsible for requesting on the All Staff Chat for the client to be added to the security list.

For clients that you personally add to the guest list: reply all on the security guest list that Office Assistant sent for the day the client is coming in and provide a screenshot of that ct addition

**Scheduling Coordination of Care Call for Client with another Provider**

1. Ensure consent to release is on file for the specific provider client would like their therapist to speak with. Ensure consent to release dates are active.
2. Confirm with the therapist if the call will be complimentary or if the client will be charged for the therapist’s time.
3. Inform client if they will be responsible for fee for therapist’s time and note fee in MB.
4. Reach out to the provider to set up a meeting. You can give them the consult line, but I would suggest also collecting their contact number for cases like this. You could ask, "Just in case there's any issue, may I have a direct contact number for Dr. X?

# Drifter Email Protocol

Office Assistant will send reception and the therapists clients who have not been seen for the last 2 weeks along with options we can offer them.

-Things to remember in doing the report and in sending the email to clients:-

1. Need to check ahead at the client's future schedule to make sure they don't have something scheduled in the upcoming weeks and just needed to take a few weeks off due to travel or something.
2. Need to loop the primary therapist in to make sure that a check-in at this point is appropriate.
3. If a client has only been seen 1-2x by an Associate and does not respond to the first outreach attempt, reception should send the email saved in canned responses titled  **‘Associate Drifter 1-2 Visits’.**
4. If an established client (i.e., seen for 3+ visits by an Associate) does not respond to 2 consecutive outreach attempts, reception should send the email saved in canned responses titled  **‘Associate Drifter 3+ Visits’.**
5. When sending the drifter email to the client, blind copy Dr. Chloe.
6. Be sure to create a google alert to follow up with the therapist is no response from the client within 24 hours

# Group Therapy

If a client has joined Group therapy for the first time you must

* Email them a confirmation of the date, time and location of the session
* Confirm that therapist is aware of a new client
* Make sure their name is provided to guest list

The group will cost $80 to join but is reimbursable by insurance. Only clients of the practice will be able to join the group. If you are contacted by people who want to join the group but are not clients of the practice, steer them towards a 15-min phone consult with Dr.Chloe.

There are multiple templates in the Canned Response folder that will give more information in regards to the cost breakdown.

Group Process for New Clients to CP

1. MUST confirm 5 pts and fees
2. must attend 30 minute evaluation session with therapist hosting group BEFORE coming to group if they are NEW - existing clients do NOT need to attend this
3. For 30 min eval session with therapist hosting group - we need CA&HIPPA and HK completed
4. Once they are approved for group, then we need CCA and In-Person Group Therapy: Agreement to Confidentiality

If a client is late for a group therapy session, please treat them the same as if they were late to a regular 45-min session. You must

* send them a reminder of the cancellation policy
* mark them as a LC/NS
* note if they have used a waiver or if the session will be charged

# email the biller of the cost for the missed session.

# Coaching Clients

If a client is located in a place where their therapist is NOT licensed, then the client is not able to receive therapy services.

Before becoming a coaching client, the client MUST have a free 15-minute phone consult with Dr. Chloe to ensure the client is appropriate for coaching services.Please send them the Coaching Agreement via Echosign.

International clients will need to be billed using paypal since our system is not able to accept international credit cards. Do NOT send a CCA to an international client. Instead, confirm with the client you can send them invoices via PayPal and confirm what email address to send invoices to.

Clients that are paying via PayPal:  
1) You must alert RM and inform her of how much to bill per session.  
2) Alert Biller that we will be collecting payments via PayPal for the client.

**NOTE**- if a therapy client using insurance is going to be out of state for a session, MUST obtain the “okay” from Dr. Chloe whether or not the session can still be therapy and billed to insurance, or if it needs to be changed to coaching.

# Special Exception Protocol

Consider trying for a "special exception" if a regular client of Dr Chloe's is frustrated due to lack of availability or if a regular client wants to book a session but Dr. Chloe’s schedule is booked. **Please don't offer "special exceptions" to client without checking with Dr. Chloe FIRST.**

A. Use subject line "Special Exception- Regular Client". CC RM and the other receptionist.

B. In body of email, indicate:

- Name of client

- Times they seem to need/want, and if I have conflicts in my personal calendar

- How much availability I have in my normal clinical schedule cc dr.

C. If you don't get a response from Dr. Chloe within 3 hours, check again- if your shift is ending and no response, check again.

D. If you're a receptionist coming onto a shift and there's an unanswered "special exception" email from the other receptionist, pick up the thread and keep following up till you get a response.  
  
**Wait List Spreadsheet**

1. If a client requests a spot with a therapist that is not available, reception will offer the therapist’s other availability and offer to place the client on the wait list spreadsheet.
   1. IF it is Dr. Chloe’s client and they are requesting a time outside of her normal hours, please FIRST check with her to see if she would like to accommodate the client. CC Dr. Chloe’s PA as well on the email.
2. Receptionist will monitor the wait list spreadsheet daily to see if any of the requested spots have opened up.
3. When an appointment opens up that is available, reception will send email to the client offering the spot
4. If there are multiple clients that have expressed interest in the spot, reception is to email all clients at the same time (Separate emails to clients! DO NOT do a group email because this would compromise security). The first client to reply back to confirm will be given the spot.
5. Receptionist will send a daily update to Dr. Chloe & RM regarding any updates to the Wait List (i.e. clients removed from wait list, or any spots offered to clients)
6. When a therapist requests for a client to be added to the wait list, the receptionist on duty will reply to the email with a screenshot of that client added to the wait list as specified by the therapist.
7. When reaching out to the clients in the wait list for next-day openings, please provide a deadline 30 minutes prior to the end of your shift if the time offered falls within the first 2 hours of the Receptionist’s shift.
8. For waitlist openings, please reach out to clients within the next 60 minute (90 minutes if Reception is very busy); in the event that the Receptionist on duty is swamped with emails, please email Dr. Chloe and RM with the SL “WL Opening (date and time) - will R/O once (action plan). When Receptionist has R/O’d, respond on the thread to confirm.
9. For clients on phone call basis, call them first before emailing the rest of the WL

# Holding Appointments in MB for a Client

ONLY the 3 situations outlined below are when an appointment can be in Mindbody without receiving confirmation from the client first.

* New client or 15-min consult in the process of confirming essential information and has a deadline.
* Holding a standing spot for a New Client who hasn't met their therapist yet, and we want to give them a chance to meet the therapist before deciding on the standing appointment (deadline is shortly after their first meeting with therapist).
* Client whose therapist has flagged the client as really needing an appointment and so the therapist or management has specifically decided to offer client the time and then hold the time for that client (there should usually be a deadline in this case as well). The DL should be noted in the appt notes in MB and a g-cal event placed as a reminder for the receptionist on duty to remove the hold if the client has not responded.
  + Example of note in MB for appointment hold: Spot held for Jane D per Dr. Chloe. DL 7.31.17 at 8PM. KH 7.30.17

# When Should I Email the Biller?

* When a client is late and we will charge the client/insurance differently
* When a client fills out a new CCA
* When a client changes insurance information
* When a client is a no show and needs to be charged/ waived
* When a client has a special request and needs to be charged
* When a client has a specific billing question and needs to talk to our biller
* Anything having to do with payments or billing

# Scheduling in Dr. Chloe’s Personal Calendar

Any events scheduled should be booked under the calendar: “Dr. Chloe Carmichael, PhD”

If you schedule an event in Dr. Chloe’s personal calendar that is during the time she has clinical hours in Mindbody, you must be sure to block out the event in Mindbody as well (book as non therapy appointment and include notes).

## Scheduling Interviews

Interviews scheduled with Dr.Chloe will be treated on a case by case basis. If Dr.Chloe is scheduled for an interview but a client wants to book at that time, we will check to see if an associate would be available to meet with the interviewee instead and, if so, reschedule the interview from Chloe's LC calendar to the associate’s LC calendar. **Check with Dr.Chloe first.**

**Additional Notes**

**1- Normal and After Hours Guest List ( In process)**

After hours guest includes anyone before 7am and anyone after 7pm. These guests are also those who are booked an appointment on Saturday or Sunday as well as on any holiday that occurs during the week. When entering names on the guest list, please be sure to add anyone who is booked from 6:45pm and onward to both the regular guest list as well as the after hours guest list.

The guest list is due at 11:00am each workday for the following day

**2 - Do NOT change the voicemail for 3922 without management’s permission first.**

Voicemail to be saved should read: Thank you for calling Dr. Chloe's office. I'm sorry we missed your call and we will get back to you as soon as possible. You may also reach us via email at reception@drchloe.com. If this is an emergency, please hang up and dial 911. Thank you.

**3- Clients create profile in MB, but never book appt.**

If receptionist notices a client creates a MB profile, but never books an appt, receptionist should then create a g-cal event in 5 hours to reach out to the client with CR: Profile in MB, no booking.

**4- NEVER copy from old emails** because copy/pasting from client emails increases our risk of exposing client data

5 - When a therapist late cancels because she is sick: advise discretion with new cts

6 - When a ct has been referred out for things like bipolar bpd substance abuse etc., request Office Assistant to remove from mailing list