

SAMPLE PRACTICE PROCEDURES Kathleen Haley, LMFT Date _____.

This document describes the general procedures I use to run my private practice from home.

First contact:

Client or clients call, email, or text me. I return the contact within 24 hours if possible. I keep track of these contacts in a confidential notebook and check them off once we connect. I offer a 20 min free consultation by phone or video. I keep any notes I may have made in my locked file cabinet.

Scheduling:

Once I determine the client(s) is a good fit I schedule their first appointment within a week if possible. I explain my services and my fee. I send out on-line forms to be filled out before the first appointment.

Reminders:

My online platform automatically sends clients reminders 36 hours before and a few minutes before the appointment. Clients may choose not to receive reminders.

Records:

My patient records are kept online in my secure platform that is HIPAA compliant, Simple Practice. I have a BAA agreement with this entity. I also keep a paper shadow chart in case the internet should go down. I keep these charts in a locked file cabinet in my home office, which is also locked.

Missed appointment/ late cancellation charge:

I inform clients of my missed appointment charge for late cancellations and missed appointments. I ask for 24-hour notice. I charge my full fee for this. I do not charge if my client could not avoid the cancellation due to illness or illness of a child. I let the first infringement go without charge and remind the client about my policy.

Therapist cancellation:

If I have to cancel at the last minute or if the session does not work due to technical difficulties on my side, I offer the clients a free session the next time.

Professional will:

I have a professional will in case of my incapacitation or death. I have a section of my Informed Consent form that explains how this will work and has the client release their information to my assigned therapist.

Fees:

I review my fees annually and let clients know when there will be a fee increase at least three months in advance. I allow for sliding scale fees on a case-by-case basis. Clients pay on my practice management system by entering their credit card information. They can also use Venmo or mail a check if preferred. If unpaid balance goes past two visits I send the client an invoice by email.

Insurance:

I do not accept insurance in my practice. I am willing to give the client(s) a superbill after payment that they can submit to their insurance for possible reimbursement.

Review:

I review these policies and procedures annually and make any necessary changes.