Business - Constructing Efficient Systems - New Client Processing

By Dr. Linda Hancock

ABOUT THE AUTHOR

Dr. Hancock has written a regular weekly column entitled “All Psyched Up” for newspapers in two Canadian provinces for more than a dozen years. Over the years, her readers and clients have said that they have benefited from her common-sense solutions, wisdom, and sense of humour. Dr. Linda Hancock, the author of “Life is An Adventure…every step of the way” and “Open for Business Success” is a Registered Psychologist who has a private practice in Medicine Hat. She can be reached at 403-529-6877 or through email office@drlindahancock.com

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Before you ever have the first appointment, you will need to ensure that you can provide appropriate services to match the needs and then ask a number of questions to gather information for your file.

Following are the things that need to be asked when the prospect initially contacts the office:

1. Who referred you? This will help to determine the type of services that are needed and help to identify if there is a third-party who will pay the fees.

2. Have you had previous appointments in this office? If so, you will be able to reactive an archived file and review the case before the client arrives for the session.

3. Why does the client want to see a psychologist? Gathering this information will allow you to understand the issues to be dealt with and then refer the client elsewhere if the work falls outside of your competency or mandate.

4. Who will be attending the sessions? This questions provides you with an opportunity to accurately determine fees and also give an opening for discussion of confidentiality.

5. Is there are any fee coverage available for the client? You will then be able to describe the process for the client regarding payment. Some companies allow the therapist to direct bill whereas others only accept a receipt and form from the client who will pay you and then submit a claim. Also, some companies only pay a portion of the fee so the client will need to know how the balance can be paid (cash, cheque, debit or credit card options should be explained).

6. What is the client contact information? You will need full name(s), address and telephone numbers. I have a printed form which we use to record this. There have been several times when the receptionist neglected to collect the information. I was unable to follow up and, when the client did not follow my twenty-four hour cancellation policy, I was unable to invoice them for not showing up.

Once you have gathered the above information you will need to explain:

1. Office location and parking. I have all of this information on my website so besides explaining, give them the URL to review. It is also important to give simple directions and details such as when any outside doors may be locked.
2. Fees and payment information - Explain what forms of payment you accept, the timing and and amount of fees.
3. Cancellation policies. For example, I charge the full fee if the client does not cancel or rebook twenty-four hours in advance.
4. Information they can access before the appointment (your website, current newspaper articles or any other resources).

During the initial contact with your prospect, you will be developing rapport with them. It is a scary thing for some people to call a professional for an appointment, especially if they think that their problem is embarrassing. Your tone and words will help them to relax and look forward to their first appointment.