# Policies, Procedures and Informed Consent

**INTAKE AND ASSESSMENT**

[ ] OUR VA'S OBTAIN EXTENSIVE TRAINING ON BEST PRACTICES FOR COMMUNICATING WITH YOUR CLIENTS, THEY RECEIVE TRAUMA INFORMED CARE TRAINING, UNDERSTAND THE UNIQUE CHALLENGES FACED BY THERAPIST AND THEIR CLIENTS OUR ASSISTANTS ARE TRAINED IN REFLECTIVE LISTENING, SKILLS, MOTIVATIONAL INTERVIEWING, BASIC ASSESSMENT, FINDING THE BEST FIT IN TERMS OF PROVIDING REFERRAL SOURCES, RISK MANAGEMENT AND HOW TO RESPOND ADEQUATELY WE ALSO RECOMMEND PROVIDING YOUR VA OF YOUR EMERGENCY PROTOCOLS.

[ ] OUR ASSISTANTS UNDERSTAND PRIVACY POLICIES AND ARE HIPPA TRAINED ANNUALLY

[ ] ENTER CLIENT INFORMATION INTO YOUR EHR: THIS INCLUDES DEMOGRAPHICS AND INSURANCE INFORMATION

[ ] WE TRACK YOUR REFERRAL SOURCES WITH EVERY CALLER AND ASK IF THEY WOULD LIKE TO RECEIVE YOUR NEWSLETTER

[ ] WE COMMUNICATE THE VALUE OF YOUR WORK, SKILL SET, PERSONALITY AND THE BENEFITS OF THERAPY

[ ] WILL REVIEW YOUR CANCELLATION POLICY DURING THE INTAKE

[ ] WE GET A GOOD SENSE OF THE PRESENTING PROBLEM

[ ] YOU WILL INFORM YOUR VA OF YOUR FEES, INSURANCE COMPANIES YOU WORK WITH AND POPULATION YOU WORK WITH

[ ] WE CAN HAVE THEM SCHEDULE WITH US TO COMPLETE YOUR FORMS, WE CAN EMAIL THEM OR DIRECT THEM TO DOWNLOAD THEM FROM YOUR WEBSITE OR SEND VIA YOU EHR

[ ] YOUR VA WILL KEEP A LIST OF YOUR PREFERRED PROVIDERS TO REFER TO AS WELL. YOUR REFERRALS LIST SHOULD IDENTIFY THE PROVIDERS SPECIALTIES , AGE RANGES THE PROVIDER WORKS WITH, AND CONTACT INFORMATION

**PROVIDE EXCELLENT CUSTOMER SERVICE**

[ ] WHEN A POTENTIAL CLIENT CONTACTS YOU WE ARE THEIR FIRST POINT OF CONTACT. WE VIEW THE FIRST POINT OF CONTACT AS A VITAL OPPORTUNITY. WE PRIORITIZE DEVELOPING RAPPORT, PROVIDING COMFORT, AND TALKING ABOUT YOUR UNIQUE TALENTS SKILLS.

[ ] WE SPEAK FOR YOUR PASSIONS AND TALENTS.

[ ] USE SCREENING PROCEDURE OF YOUR CHOICE TO OBTAIN YOUR IDEAL CLIENTS. FOR EXAMPLE, WE CAN REFER CALLERS TO ANOTHER PROVIDER IF THEY DO NOT FIT WITHIN YOUR IDEAL CLIENT CRITERIA AND ASSESS FOR BEHAVIORS AND DISORDERS THAT YOU PREFER NOT TO WORK WITH.

[ ] DESCRIBE RISKS ASSOCIATED WITH UTILIZING INSURANCE FOR THERAPY

[ ] SCHEDULE A CONSULTATION BASED ON YOUR PREFERENCES

**HOW WE DO MARKETING**
[ ] WE CAN CREATE AND SCHEDULE CONTENT FOR YOUR SOCIAL MEDIA SITES USING YOUR LOGOS.

[ ] WE WILL DISTRIBUTE YOUR CONTENT.

[ ] WE CAN PROVIDE RESEARCH AND REFERENCES FOR YOUR BLOG POSTS.

[ ] WE CAN CREATE YOUR SOCIAL MEDIA POST.

[ ] IT IS COMPLETELY UP TO YOU, YOU CAN REVIEW THE CONTENT PLAN AND ENTER IN ANY CHANGES.

[ ] WE CAN SET UP EMAIL AUTOMATIONS TO DISTRIBUTE YOUR MARKETING MATERIALS

**HOW WE SCHEDULE AND MANAGE YOUR CALLS**
[ ] WE CAN SET UP PERSONALIZED VOICEMAIL AND PHONE NUMBER THAT GOES STRAIGHT TO YOUR ASSISTANT

[ ] YOUR ASSISTANT IS AVAILABLE **MONDAY - FRIDAY 9AM-6PM CENTRAL TIME, unless other arrangements have been made.**

[ ] WE STRIVE TO ANSWER AS MANY CALLS AS WE CAN LIVE, BUT IF FOR SOME REASON WE CANNOT WE WILL RESPOND TO EMAILS AND PHONE CALLS NO LATER THAN **2 HOURS AFTER RECEIVED** WITHIN BUSINESS HOURS. CALLS AND EMAILS RECEIVED OUTSIDE OF BUSINESS HOURS WILL BE RETURNED THE FOLLOWING DAY.

[ ] WE WILL MAKE 3 ATTEMPTS TO ENGAGE A POTENTIAL NEW CLIENT THAT HAS BEEN UNRESPONSIVE

THE 1ST ATTEMPT WILL OCCUR ON THE DAY OF CONTACT.

FURTHER ATTEMPTS WILL BE MADE EVERY OTHER DAY

WE WILL EMAIL AND LEAVE A VOICEMAIL EACH TIME.

BECAUSE EVERY THERAPIST HAS DIFFERENT EXPECTATIONS IF YOU WANT YOUR VA TO FOLLOW-UP DAILY VS EVERY OTHER DAY PLEASE LET THEM KNOW THAT THIS IS YOUR PREFENCE PLEASE STATE THIS EXPECTATION ON YOUR ASANA COMMUNICATION BOARD FOR YOUR VA TO REVIEW

[ ] YOUR ASSISTANT CAN COMPLETE INTAKES FOR YOU SO YOU DON'T MISS ANY PAPERWORK SO YOU HAVE IMPORTANT INFORMATION BEFORE THE FIRST SESSION

[ ] YOU CAN DESIGN YOUR OWN UNIQUE PERSONALIZED SYSTEM FOR INCOMING CALL PROCEDURES

[ ] SOME THERAPIST PREFER TO GIVE THEIR DIRECT NUMBER TO CLIENTS AND THE ASSISTANT'S NUMBER FOR SCHEDULING AND ADMINISTRATIVE TASKS ONLY. CLIENTS ARE ADVISED TO CALL THE THERAPIST DIRECTLY REGARDING CLINICAL ISSUES IN THIS CASE. MOST THERAPIST SHARE A VOICEMAIL AND CALLING SYSTEM WITH THEIR VA SUCH AS PHONE.COM OR GRASSHOPPER.

[ ] YOU CAN  FORWARD YOUR INCOMING CALLS TO YOUR ASSISTANT AS MUCH OR AS LITTLE AS NEEDED IF YOU ARE GOING TO BE UNAVAILABLE OR JUST NEED TO UNPLUG FOR A WHILE.

[ ] YOUR VA IS TRAINED TO NOTIFY YOU ON ANY CLINICAL ISSUES A CLIENT REPORTS

[ ] WE WILL SCHEDULE USING YOUR EHR SYSTEM AND YOU CAN BLOCK OUT TIMES YOU ARE UNAVAILABLE

 **PACKAGE PURCHASING AND INVOICING**

[ ] WE WILL SEND YOU AN INVOICE FOR THE PACKAGE YOU PURCHASED AT THE BEGINNING OF EACH MONTH. YOUR INVOICE WILL INCLUDE THE PRICE OF YOUR PACKAGE IN ADDITION TO ANY FEES FOR EXTRA HOURS ADDED TO YOUR PREVIOUS MONTH'S PACKAGE.

[ ] WE WILL SEND YOU AN INVOICE PAYABLE ONLINE.

[ ] WE WILL INCLUDE AN TIMETRACKED LIST OF EVERY TASK COMPLETED AT THE END OF EACH WEEK.

[ ] TO KEEP YOUR CHOICES FLEXIABLE THERE ARE NO LONG TERM CONTRACTS OR OBLIGATIONS. PACKAGES ARE PURCHASED ON A MONTH TO MONTH BASIS. IF YOU DECIDE YOU NO LONGER NEED OUR SERVICES 3O DAYS NOTICE IS REQUIRED TO END YOUR SERVICES.

## ****Monthly Package: 20 Hours ​****

**20 Hours Per Month $700, this package includes**
**​**[ ] **2 Hours of face to face training time with your VA.**
[ ] **1 Hour meeting with Cristina at the beginning of each package month for strategic planning sessions to streamline your procedures, review progress and to provide consulting for scaling your practice.**

[ ] **Strategic planning and the 2 hours of training time is separate from or in addition to your 20 hours of task time. These sessions will not be subtracted from your 20 hours of task time.**
Virtual Assistant Can Perform All Services From Our Service List For You.
Appointment Scheduling
Managing Your Voicemails
New Client Intake
Email Account Management
VERIFY Insurance Eligibility
Verify Insurance Claim Status
Verify Co-pays, Coinsurance, Deductibles and Out-Of-Network Benefits
Complete Psychological Assessments
Update Client Electronic Files
Provide Appointment Reminders
Provide Client Re-Engagement
Social Media Marketing
Content Marketing: Home Page, Keyword Research, Blog Writing
 Obtaining Private Pay Clients For Your Practice
Request Any Task To Be Completed By Your Virtual Assistant.
Yes, this package really does offer everything which includes social media marketing and billing.
Choosing This Plan Saves You The Most Money

## Monthly Package:11 Hours

**11 Hours Per Month $440, this package includes**
**You could be free of your phone and email, saving you precious time that you'd rather be spending in session and increasing your income.**
**​​**[ ] **1 Hour of face to face training time with your VA.**
[ ] **1 Hour meeting with Cristina at the beginning of each package month for strategic planning sessions to streamline your procedures, review progress and to provide consulting for scaling your practice.**

[ ] **Strategic planning and the 1 hour of training time is separate from or in addition to your 11 hours of task time. These sessions will not be subtracted from your 11 hours of task time.**
Appointment Scheduling
Managing Your Voicemails
New Client Intake
Email Account Management
Verify Insurance Eligibility
Verify Insurance Claim Status
Verify Co-pays, Coinsurance, Deductibles and Out-Of-Network Benefits
Complete Psychological Assessments
Update Client Electronic Files
Provide Appointment Reminders
Provide Client Re-Engagement
Obtaining Private Pay Clients For Your Practice Track Referral Sources
Enter New Client Information Into Your EHR
Assure Your Callers Become Ongoing Clients
Start Forming Your Email Newsletter Email List It’s FREE advertising for you!
Answer Incoming Calls
Send Thank You Letters To Referral Sources
Screen and Assess Callers To Obtain Your Ideal Caseload
Handle All Of Your Clients Scheduling Needs
Link Intake Paperwork To EHR
Manage And Respond To Emails
Call Insurance Companies To Obtain Benefit Information
Follow-up With The Insurance Company
Keep Client Information Updated In Your EHR
Schedule Client Consultations With You If You Wish
Document How Calls Were Responded To In Your EHR System
​Data Entry
​Virtual Assistant Can Perform All Services From Our Service List For You.
Move Client Data Into A New EHR System.
Create Referral List For You Based On Your Client's Needs ( outpatient therapy groups, referral sources for providers that accept a certain insurance plan etc.)
​Market Your Upcoming Therapy Group or Talk

**CONSULTATIONS**
[ ] WE PROVIDE 1 HOUR OF SCHEDULED STRATEGIC PLANNING TIME AT THE BEGINNING OF EACH PURCHASED PACKAGE MONTH. THIS IS A TIME TO STRATEGIZE AND STREAMLINE YOUR PRACTICES. CONSULTATIONS ARE DESIGNED TO TAKE YOUR PRACTICE TO THE NEXT LEVEL BY IDENTIFYING YOUR PRACTICE GOALS FOR THE MONTH AND CREATING A PATHWAY FOR SUCCESS.

[ ] CONSULTATIONS ARE STRUCTURED AND SCHEDULED AS FOLLOWS. FIRST 3O MINUTES: CRISTINA WILL REVIEW YOUR QUESTIONS, PROCEDURES THAT NEED IMPROVEMENT AND HELP YOU PRIORITIZE THE TOP 3 GOALS FOR YOUR PRACTICE. OUR HOPE IS TO CLARIFY YOUR GOALS, IMPLEMENT NEW SERVICES AND TO PROVIDE GUIDANCE WITH DEVELOPING A STRATEGY FOR YOUR PRACTICE. THE SECOND PORTION OF YOUR CONSULTATION: IS TIME FOR YOU TO DISCUSS YOUR VA AND PROVIDE ANY PERSONALIZED INSTRUCTIONS BY CLARIFY QUESTIONS. WE WILL MAKE A PLAN OR STRATEGY TO GET YOU CLOSER TO YOUR VISION.

**TRAINING YOUR VIRTUAL ASSISTANT**

[ ] WE WANT TO PROVIDE TIME FOR YOU TO TRAIN YOUR VA IN ANY SYSTEMS OR TASKS THAT CALL FOR DETAILED PERSONALIZED  INSTRUCTION FROM YOU. THIS IS A TIME TO CLARIFY AND WORK AS A TEAM WITH YOUR VA. YOU GET **(2 HOURS OF TRAINING TIME) WITH A 20 HOUR PACKAGE AND (1 HOUR OF TRAINING TIME) WITH AN 11 HOUR PACKAGE INCLUDED DURING YOUR FIRST MONTH.**

[ ] **DURING YOUR FIRST MEETING WITH YOUR VA.** YOUR VA WILL WANT YOU TO SHOW THEM WHERE TO ACCESS IMPORTANT DOCUMENTS, TEMPLATES, VARIOUS SYSTEMS AND ANY OTHER INFORMATION THEY TO HELP RUN YOUR PRACTICE EFFICIENTLY. THEY WILL RECORD THIS MEETING FOR THEIR REVIEW.

[ ] **DETERMINE A TIME AND DAY TO MEET EACH WEEK FOR THE FIRST MONTH TO PROVIDE TRAINING AND TO KEEP LINES OF COMMUNICATION OPEN EVEN IF IT IS TO JUST CHECK IN. THESE CAN BE BRIEF 15 MINUTE PHONE CALLS OR ZOOM MEETINGS. WE ARE PASSIONATE ABOUT BUILDING RELATIONSHIPS! WE WANT YOUR VA TO BE A TRUSTED TEAMMATE AND THEY ARE EXCITED TO LEARN MORE ABOUT YOU, YOUR GOALS AND THE AMAZING WORK YOU DO.**

[ ] PLEASE UNDERSTAND THAT **DURING THE FIRST 2 WEEKS** YOU MAY BE ANSWERING A LOT OF QUESTIONS AS OUR VA'S ARE TRAINED TO OVER COMMUNICATE WITH YOU DURING THIS TIME PERIOD. EVERY THERAPIST YOUR VA WORKS WITH HAS UNIQUE PREFERENCES AND WE MUCH RATHER SAVE YOU TIME BY GETTING IT RIGHT THE FIRST TIME. THE AMOUNT OF CONTACT TIME AND TRAINING TIME SIGNIFICANTLY DECREASES AFTER THE FIRST 2 WEEKS.

[ ] PLEASE MAKE TRAINING VIDEOS TO CUT DOWN ON QUESTIONS YOUR VA MAY HAVE. YOUR VA MAY ASK YOU IF THEY CAN RECORD YOUR  MEETINGS TOGETHER SO THEY GET EVERYTHING JUST RIGHT AND CUT DOWN ON POTENTIAL CONFUSION.

[ ] **WE RECOMMEND THAT YOU MEET WITH YOUR VA AT LEAST ONCE AND TO RECORD THE MEETING THE FIRST TIME YOU HAVE THEM**

* EMAIL OUT YOUR NEWSLETTERS
* POST ANY CONTENT TO YOUR WEBSITE OR BLOG
* CREATE A FORM ON YOUR WEBSITE OR CONNECT A NEW APP OR PLUG IN
* UPLOAD YOUR PODCAST
* USE A  PLUGIN ON YOUR WEBSITE THAT YOU WANT YOUR VA TO USE FREQUENTLY  (AS THERE ARE SO MANY WITH VARIOUS FUNCTIONS)

**TIME TRACKING**
[ ] WE USE HARVEST A TIME TRACKING SOFTWARE THAT BILLS BY THE MINUTE

[ ] WE SEND YOU AN ITEMIZED WEEKLY REPORT SO YOU CAN EASILY TRACK HOW YOUR PURCHASED TIME IS UTILIZED

[ ] IF YOU RUN OUT OF TIME BEFORE YOUR MONTHLY PACKAGE ENDS YOU CAN ADD HOURS TO YOUR MONTHLY PACKAGE AT A PER HOUR RATE BEFORE THE END OF YOUR PACKAGE'S BILLING CYCLE.

[ ] WE WILL STRATEGIZE WITH YOU THE BEST WAY TO USE YOUR PREPAID PACKAGE TIME SO YOU GET THE MOST BENEFIT OUT OF YOUR PACKAGE.

[ ] **WE DON'T ROLL OVER TIME AND HERE'S WHY**: THERE IS NO GOOD REASON TO NOT TAKE FULL ADVANTAGE OF EVERYTHING YOUR VIRTUAL ASSISTANT HAS TO OFFER YOU. IF YOU ARE NOT SURE WHAT TO FOCUS ON NEXT WE ARE HERE TO COACH YOU AND GUIDE YOU. THERE IS ALWAYS ROOM FOR IMPROVEMENT IN EFFICIENCY AND GROWTH POTENTIAL. NOT TO MENTION PASSIVE INCOME STREAM POTENTIAL. THE ONLY EXCEPTION TO THIS IS IF YOUR VA IS ON VACATION.

**COMMUNICATION AND ASSIGNING TASK**
[ ] WE USE A COMMUNICATION BOARD WHERE YOU CAN ASSIGN TASK BY PRIORITY STATUS

[ ] ON YOUR COMMUNICATION BOARD YOU CAN WRITE DETAILED INSTRUCTIONS OF EACH TASK AND ATTACH DOCUMENTS, WEB LINKS OR ANY OTHER INFORMATION NECESSARY TO COMPLETE A TASK

[ ] YOU CAN ALSO VIEW THE STATUS OF EACH TASK, WHAT YOUR VA IS WAITING FOR FEEDBACK ON, ASK AND ANSWER QUESTIONS AND FOLLOW THE TASK TO COMPLETION AT A GLANCE

[ ] WE USE ASANA TO MAKE ASSIGNING TASK EASY AND TRACKABLE: **Asana is the work management platform teams use to stay focused on the goals, projects, and daily tasks that grow business.**

## USING ASANA COMMUNICATION BOARD

* LOG IN TO ASANA <https://app.asana.com/-/login>
* USER NAME:
* PASSWORD
* CLICK ON THE PROJECT FOLDER WITH YOUR NAME ON IT
* CLICK THE + SIGN ON THE CATEGORY IN WHICH YOU WANT TO ENTER A TASK.
* CATEGORIES INCLUDE: **NEXT** (Task that are ready to schedule next on the list that I will work on after priority items are complete.) **PRIORITY TO DO**:Task that are to be done now or in a predetermined order as set by the assigner. Move task to this column when their priority has increased to most urgent or pressing issue you want focused on. **Doing:**Your VA moves task here from the priority to do column and the waiting on feedback column when task is in progress.**Waiting on Feedback/ Response**: VA moves things to this column from the Doing column when a response is needed before a task can be complete either from the task assigner or point of contact that needs to respond before moving forward to completion of a task. **DONE:** Tasks are marked as completed and moved into this column when they are done. **QUESTIONS**: YOU CAN ASK YOUR QUESTIONS AND GET YOUR ANSWERS FROM YOUR VA ON ASANA. YOUR VA WILL ALSO POST THEIR QUESTIONS FOR YOU THERE AS WELL.
* ONCE THE + HAS BEEN CLICKED ENTER THE TITLE OF THE TASK AND CLICK ON IT AGAIN TO WRITE DETAILED INSTRUCTIONS FOR YOUR VA.
* YOU CAN ALSO ATTACH DOCUMENTS TO YOUR TASK

**HOW WE DO BILLING**
[ ] FOR THERAPIST THAT UTILIZE SIMPLE PRACTICE AND MY CLIENTS PLUS: WE WILL USE YOUR EHR SOFTWARE TO ELECTRONICALLY SUBMIT YOUR CLAIMS DAILY. WE LEAVE IT UP TO YOU TO COLLECT YOUR CLIENTS COPAYS SO THERE IS NO CONFUSION.

[ ] WE WILL USE YOUR EHR SOFTWARE TO SUBMIT YOUR ELECTRONIC CLAIMS

[ ] WE WILL KEEP CLIENT DEMOGRAPHIC AND INSURANCE INFORMATION UPDATED IN YOUR EHR.

[ ] WE CAN ENTER DATA AND GET YOU SET UP FOR ERA'S AND EFT.

[ ] GET YOU SET UP FOR ERA'S AND EFT

[ ] YOUR VA IS TRAINED TO SCHEDULE A BRIEF PHONE CALL WITH YOU IF ANY BILLING ISSUES ARISE AND THEY NEED FURTHER CLARIFICATION FROM YOU REGARDING A CLAIM OR A DATA ENTRY PROCEDURE

[ ] OUR ASSISTANTS ARE TRAINED IN VARIOUS EHR SYSTEMS. IF YOU UTILIZE SOFTWARE YOUR VA IS NOT FAMILIAR WITH TRAINING YOUR VA ON YOUR EHR WILL BE BLOCKED OUT TO ACHIEVE THIS TASK DURING YOUR TRAINING TIME

[ ] WE CAN GET YOU SET UP IN SIMPLE PRACTICE AND MY CLIENTS PLUS

[ ] WE CAN FOLLOW-UP AS NEEDED IF AN INSURANCE CLAIM INACCURATELY GETS DENIED PER YOUR REQUEST. WE ASSURE ACCURACY OF SUBMISSION BUT CANNOT TRACK ALL OF CLAIMS THROUGH TO PAYMENT. WE CAN ENTER YOUR EOBS

[ ] WE WILL CLARIFY WITH YOU IF ANY BILLING ISSUES ARISE THAT REQUIRE FURTHER CLARIFICATION FROM YOU REGARDING A CLAIM OR A DATA ENTRY PROCEDURE

### VACATIONS

* WE WILL DO OUR BEST TO MAKE SURE THERE IS A VA AVAILABLE TO COVER FOR VACATIONS HOWEVER THIS IS NOT ALWAYS POSSIBLE. IF WE CANNOT GET YOUR VA'S TASKS COVERED YOU WILL HAVE TO MANAGE YOUR TASKS FOR NO MORE THAN A 7 DAY TIME PERIOD. IF THIS OCCURS, WE WILL ROLL OVER ANY UNUSED TIME IN YOUR PACKAGE TO YOUR NEXT PACKAGE FOR YOU OR WE CAN EXTEND YOUR PACKAGE TO PROVIDE YOU WITH AN ADDTIONAL WEEK TO USE YOUR REMAINING TIME AS WE VALUE OUR COMMITMENT TO OUR CLIENTS.

**HOLIDAYS OFF**

OUR VIRTUAL ASSISTANTS DO NOT WORK ON THE FOLLOWING HOLIDAYS

**New Year's Day**

**Memorial Day**

**Independence Day**

**Labor Day**

**Thanksgiving Day**

**Christmas Eve**

**Christmas Day**

**By signing below I am acknowledging that I have reviewed the Revitalized Therapist  policies and procedures and agree to the procedures as described:**

Client Name (print): **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Client Signature: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Date: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**