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DISCOVERY CALL

A discovery call will help you to determine if client would be a good fit for your services and if the family would like to move forward with the intake/assessment.

Helpful Tools:

- Provision of Services & Fees
- Client Intake Form
- Discovery Call Script
- Waitlist Application Form
- Verification of Benefits (VOB) (if planning to superbill)

2

INTAKE APPOINTMENT

Prepare to comply with the No Surprises Act by providing private pay clients with a Good Faith Estimate Notice and Good Faith Estimate for Assessment. Request a credit card authorization if this payment form is accepted.

Helpful Tools:

- Client Intake Form
- Good Faith Estimate-Assessment
- Good Faith Estimate Notice
- HIPAA-Compliance Forms

3

BILLING & PAYMENT METHOD

Establish how you will bill for services and collect payments.

Helpful Tools:

- Billing Invoice Forms
- Superbill Forms
- Credit Card Authorization Form
- Good Faith Estimate/Estimate for Services
- Request for Payment Letter

4

INTAKE ASSESSMENT

Identify how you will conduct an initial intake assessment.

Helpful Tools:

Recommended:

- Client Policy Manual
- Contract for Behavioral Service
- Client Intake Form-Child or Client Intake Form-Adult
- Assessment Report Template(s)
- Data Collection Sheets

Optional:

- Consent to be Photographed, Video Monitored, or Recorded (if applicable)
- Consent to Share Information (if applicable)
- Agreement & Consent to Implement Emergency Interventions (if applicable)

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TREATMENT RECOMMENDATIONS

Identify how you will conduct an initial intake assessment.

Helpful Tools:

- Good Faith Estimate Treatment
- Treatment Report Templates

DEVELOP YOUR PRIVATE PAY PRACTICE PROCESS