Empowered Therapy Inc.
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SOPs:

Copy of SOPs: Clinician steps to aid in Billing coordination/payment plans

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Summary:

These are processes to follow when a current client requires a payment plan and/or billing coordination support. Please be sure to use these SOPs in conjunction with consultation with your supervisor, if applicable, and your on-site clinical director.

Resources:

agillogly@empoweredtherapy.org

lgarski@empoweredtherapy.org

On-site clinical directors

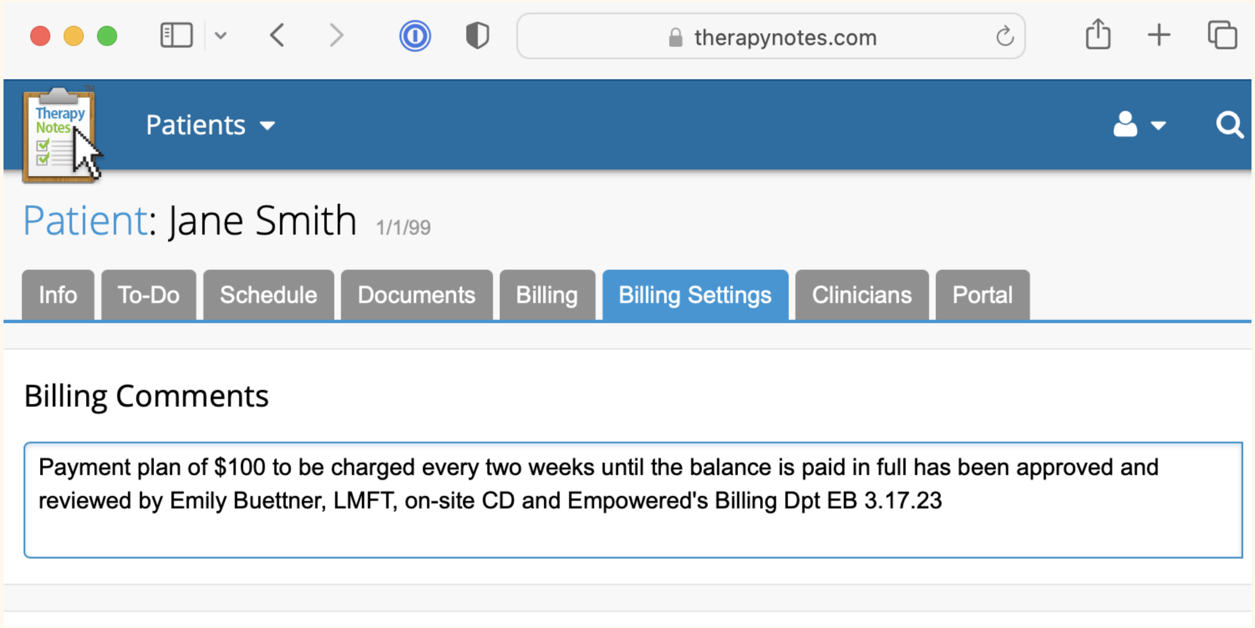
Supervisor, if applicable

Payment Plans

1. When requesting a payment plan for a client, you must consult with your supervisor, if applicable, and on-site clinical director, to discuss reasons and proposed plan.
2. Once on-site clinical director approves the proposed plan, you needs to:

a. Email Amber with plan details.

b. Add a note in the “Billing Settings” tab in TherapyNotes.



c. Email client to confirm payment plan details.

   i. Add email as a miscellaneous note in TherapyNotes.

Billing Coordination

1. You should be aware of any outstanding client billing issues when Amber blind copies you on emails to your client with reminders about updated credit cards or outstanding payments due.
2. You can communicate with Billing to determine if an email from the therapist to the client would be useful. This can serve as a reminder to the client that updated payment information is needed in order to resume with the next scheduled session.
3. You should check the “Documents” tab before the client’s next scheduled session to confirm if the updated Payment Authorization form was submitted. If it was, no further action is required.
4. If it was not submitted, you cannot resume with the next scheduled session without an updated payment method on file.

5. Instead, you will support Empowered's Billing Department in collecting updated payment information by reaching out to your client and offering to update the payment method at their next scheduled session.
    a. If the client confirms that they will be able to do so, then you can proceed with the session as scheduled.