

**From:** Rachel Lee Rachel.Lee@umicharlotte.com  
**Subject:** Follow up Today  
**Date:** October 18, 2024 at 9:49 PM  
**To:** Beth Cartrette beth@7starsdesign.net

---

Good evening Beth,

So great to work with you today and begin diving into your story. You have put so many of the pieces together and I hope I can keep contributing at least a little bit to affirming you and helping get you the support you need.

I'll prepare a summary of our visit today with the top recommendations for you. In the meantime let's work on some scheduling! My Friday 1:00 slot has opened up wide. The only exceptions are my trip to Rhode Island in November 22nd and the week of Christmas. With that out there I have a few things I'd love for you to think over and share your preferences.

#### The Next Couple Months:

I mentioned today that typically every other week works well for most clients. I think we could reach that stage but looking again at the amount of referrals we can line up, working with your GP and getting you stable, I wonder if we should meet a little more often to get started? I will work with you, I know finances are a big part of that picture. Based on what we were able to get done today I'd love your feedback on whether you think every other week will be enough to get things up and running or if you agree that weekly is a better way to go for starters. I do strongly believe in breaks so maybe 3 weeks on and one week off working around the holidays.

#### Financial Foundation #1:

What we can do financially is set up a monthly payment plan with a baseline amount, and then whatever you need on top of that, additional communication with providers, vetting new physicians or extra appointments, I can track on our subscription sheet for you as an amount owed. You'll have the time to pay that off down the road as we get you more stable and able to work or on disability, or if your mother would like to come and get your account current. This way I we can get you what you need to start turning the ship around without worrying about really high costs up front. I love that we can do this with Umi and I think in your case it's exactly why we have this option available.

So what I propose is that we start next Friday, and then I'll see you every Friday until the 22nd. That'll be one month. I can stay in touch with you as needed the week I'm out of town, and then we'll have the week of Thanksgiving off.

That'll give us a solid month to get you grounded before the holidays start messing with the schedule. We can reassess at the beginning of December to see if you're ready to go to every other week, or if we need to stay back-to-back until after Christmas.

#### Financial Foundation 2: Creative

I'd like to give you the low income discount. I absolutely think that you qualify at present even if your mom is the one paying the bills and financially well off. I'm curious about your thoughts on this though because given everything that you've told me about her, I wonder if it would possibly delegitimize our work in her eyes to give you the low income price? I will trust you with that. Based on what you experienced today I'm open to going whatever direction on this you think is best. The center will definitely put the extra money to good use if you think it would help your mom to support you by charging full price instead of less.

What I care more about is giving you the chance to feel like you are doing something beyond just having to work on your health. As an autistic I definitely could not have made it through all my health issues without feeling a sense of purpose in something. I loved the graphics I saw today, and you clearly enjoy that kind of work in the design and coding in a way that doesn't exhaust you, which I find absolutely brilliant. So regardless of what I bill for (Mom's support considered) I would like to work with you on other things for Umi.

If you want to tell your mom that you're working for me to help pay for my help that's fine. If you want to donate your time because you find more purpose in that and fulfillment, that's fine with me too. I will work with you. What we'll do is set up two different streams of communication so that your medical needs and my time supporting you are in one lane, and other projects you're doing for Umi are in another. We can have design meetings, you can present your projects, and we can pull a couple other volunteers in who are doing work here and there as they can so y'all feel connected there too.

#### To Think or Not to Think:

All right I'm going to let you process all of that. I really love shaping language and words more than visual graphics so take all the time you need to translate my aspie-passion language into your own. I went back and added headings to the natural sections I created.

#### In SUMMARY,

I propose we do Fridays at 1:00 October 25th, November 1st, 8th and 15th, off the 22nd. Meet again December 29th, with option to also meet the 6th, 13th and 20th before starting again the new year.

The baseline of your payment plan would be \$200/month for Regular income (about 2.25 consults or 2 consults plus allowance for provider work/paperwork needs etc.), or \$150 for low income (approximately the same divisions at the discounted price). That would be invoiced on the 1st or 15th of the month.

We'll keep track of all payments and services in a way you can request a copy of at any time. And we reevaluate every two or three months to make sure the needs are being met, and that the financial arrangement is satisfactory on all sides. Any additional services, extra appointments, provider support, communication support needs etc will also be tracked and added to an amount owed. You can pay more at any time. The baseline payment stays in place until the amount owed is paid in full.

Have a wonderful weekend!

Rachel Lee, Director Patient Advocacy Consultant [www.umiwellnesscenter.com](http://www.umiwellnesscenter.com) [www.rachelleepac.com](http://www.rachelleepac.com) Please allow 3-5 business days for a response to non urgent inquiries. Clients may reach me at 208-562-7734 on WhatsApp.

Sent from Proton Mail Android

