Guidelines for Scheduling and *Processing Clients*

**East Mountain Counseling Center**

A well-managed schedule of appointments is an important factor in delivering quality mental health care to teens and adults. With that in mind, there are two factors to consider when scheduling clients for appointments:

* The type of appointment required by the client’s situation.
* The urgency with which the client needs to be seen.

***Our policy***

Our clients have entrusted us with their mental health care. At East Mountain Counseling Center, we extend consideration to clients who take time out of their busy work day to allow us to participate in their mental health and wellness. We respect that clients make every effort to arrive on time for appointments, and we endeavor to be available to them when they arrive.

***Five-step approach to scheduling appointments***

1. When a client calls to schedule an appointment, assess the reason for the appointment and determine the urgency and how much time will be needed.

**New**

1. Ask the client when he or she is not available for the appointment. This demonstrates a willingness to accommodate the client’s needs.
2. Offer the client at least two choices of available times, if possible. Always state the day of the week, the date, and the time. This enables the client to choose between alternatives and demonstrates the importance of the client’s input.
3. Repeat the agreed upon time to the client. If the client is present at the time of the booking, write down the day, date, and time of the appointment on an appointment reminder card and give it to the client.
4. Close with an expression of anticipation of the next visit, such as “We’ll see you at 10:00 a.m. on March 1st.” This provides further verification of the date.

***Determining the time required for an appointment***

The time allotted for an appointment depends upon the type of appointment needed. The following table offers guidelines for determining the amount of time to book for each type of appointment:

Appointment Time

New counseling client 90 minutes

Established counseling client 60 minutes

Group therapy 90 minutes

Alcohol/Drug assessment 60 minutes

Career counseling 60 minutes

In addition, it is important to schedule into each day several “emergency” booking slots that can be used to accommodate clients who need same day appointments. The following table shows the schedule of counselors on call for emergency bookings.

|  |  |  |
| --- | --- | --- |
| Day | Counselor | Availability |
| Monday | M. Kurosawa | 1-5 |
| Tuesday | C. Foth | 2-7 |
| Wednesday | M. Smith | 2-4 |
| Thursday | P. Eriksen | 12-6 |
| Friday | F. Janda | 10-3 |

***Processing new clients***

When a client telephones to book an appointment, it is important to obtain his/her full name (ask for correct spelling), current home and work phone numbers (for contact purposes), and the general reason for the visit. Clients sometimes object to providing this personal information. When this happens, you can explain to the client that you require this information to schedule an adequate amount of time for the appointment, and so that any paperwork that might be required will be ready when he/she arrives. Also, reassure the client that all information he/she provides to East Mountain Counseling Center remains confidential.

Gather as much information as you can from the new client over the telephone when he/she calls to book an appointment. Once the client arrives at East Mountain Counseling Center, it is important to ask the client to fill out the client information form, provide an insurance card, and read and sign a copy of our privacy policy.

Last revised 2/14/2023 by Erica Esinam Gelly. East Mountain Counseling is an affiliate of PRG Health™