

Office Policies and Procedures

The office of Julie Pope Dantzler, M.S., LMHC is a solo counseling practice. The focus is to assist individual adult patients in understanding themselves better in order to make changes that will allow them to live more effectively and less encumbered by difficult past events and patterns. The length of the therapeutic process can vary depending upon a variety of issues. Some patients achieve their goals in several sessions and some can require more lengthy treatment.

Appointments, Communication and Messages

Patients are able to access the office for appointments in a number of ways. The website Juliedantzler.com lists the office phone and non-secure website. Callers will hear the office hours as well as an invitation to leave a non-secure voicemail message. They are informed that calls are typically returned at the end of the day and that every effort will be made to return calls at the earliest possible time. Persons seeking an appointment for the first time are also given the status of their ability to do so. Often the calendar becomes full and in order to responsibly address the needs of current patients, new appointment times are not possible.

Persons being seen for the first time will be asked to give their mailing address (as they will be sent a letter in the mail, occasionally via email), phone number, date of birth, best way of reaching them and preference for receiving reminders. A date and time will be set for the appointment. A letter will be sent, usually same day, confirming the appointment date and time and asking them to go to the website to read the Patient Services Agreement, fill out the Biographical Information and Telehealth Informed Consent if appropriate. They will also be asked if they would like to be contacted if an earlier appointment times becomes available and how they would like to be contacted for this. Patients are given information about the location of the office.

Current and past patients are invited to leave messages either on the voicemail or via the encrypted Therapyappointment.com email system using their personal Login ID and Password. This is the preferred method of communication as it allows the office to screen the nature of the messages. This email system is monitored at all times during the day and on weekends.

Persons seeking information about the practice or patients waiting for their initial appointment are not covered by the rules of confidentiality and therefore are able to use the unencrypted email address. Once a patient has been seen for an initial appointment s/he will be required to use the encrypted email service provided by Therapyappointment.com. If it is their wish to continue communicating via unencrypted email they will be required to sign a release indicating that they understand the risks associated with this practice.

Texting with the therapist is not an option. Her private cell phone will be given out in emergency situations only and she will not be available when on vacation. Social media of any kind will not be used with patients. This includes but is not limited to Facebook, Instagram, Twitter, LinkedIn.

Often arrangements for coverage will be made and this contact information will be given to such patients as require it. At times this contact information may also be found on the office voicemail message.

Therapyappointment.com sends reminder messages 2 days in advance of any scheduled appointment via text, email or call to a home phone. The patient chooses which is their preference. It is stressed that reminders are a courtesy and are not to be viewed as the primary means for keeping track of appointments.

Upon intake the patient will be asked to review and sign the Initial Services Agreement which reviews some office policies and procedures. During the evaluation information will be gathered to determine diagnosis, treatment goals, the possible need for referral for medication evaluation or other specialties, threat assessment, the need for releases of information and whether this office can meet their individual needs. The ability of the patient to function within the therapeutic frame – the policies and procedures of the office – will also be examined.

Fees, Payments and Use of Insurance

Typical charges for sessions as of 6/1/2020:

Initial Evaluation Session (55 Minutes) 90791 - \$150.00
Subsequent Session (50-55 Minutes) 90837. - \$130.00
Testifying in Court/Deposition portal to portal - \$250.00

Phone consultations over 10 minutes will be priced at a prorated amount commensurate with the standard hourly fees.

Payment is expected at the time of the service and will be collected at the beginning of the session.

Payments can be made using cash, checks, or debit/credit cards. Receipts can be provided onsite, via encrypted email or using the United States Postal Service. Returned check fees will be passed on to the patient and only cash will be accepted thereafter.

After 5/19/2020 this office will not be a provider for any insurance company. If patients have out of network benefits they will be given the necessary documents so that they may submit such information to their insurance company and will receive reimbursement themselves. This will necessitate such persons to pay the full amount for services at the time of the session.

Patients who are active members of Alcoholics Anonymous or Narcotics Anonymous ("active" being defined as regular support group meeting attendance, having chosen a sponsor and actively engaging with that sponsor on step work) and have a financial need will be offered a reduced rate for services.

If a patient difficulty paying in the prescribed manner they may be required to pay in advance for sessions.

Records Management

Private Health Information (PHI)/patient records are stored via Therapyappointment.com and are double password protected. Any off-site paperwork/charting is done without opening Therapyappointment.com.

All paper correspondence (faxes, letters, uploaded unencrypted text messages or emails) is regularly shredded in the office. No clinical information is maintained on paper in the office. Information received from Blue Cross Blue Shield that contains patient names, payment information and visit codes is maintained in the office in paper form and is locked up at the end of each work day.

There is no clerical staff. Phone calls, correspondence, calendar management and payment details are all managed by the owner/therapist. There is minimal risk in terms of violation of confidentiality.

Scheduling, Cancellations and Calendar Management

New patients are scheduled for an initial appointment as soon as is reasonably possible with a preference given to the timely scheduling of established patients. If the person seeking to become a new patient indicates that their issues are critical or time sensitive such that they require immediate attention they will be offered at least one (preferable two or three) other therapist names and their contact information for the purpose of referral.

A cancellation list will be maintained for those patients, new and established, who would like to be seen sooner than is scheduled, should an opening arise. The patient will be called or emailed, offered the cancellation appointment time and if it is not convenient, their name will remain on the list to be called again.

Patients are typically seen every two weeks unless the diagnosis/treatment needs dictate otherwise. Patients who are finishing up their work will be seen less frequently. When there is a concern about finances/ability to pay for treatment which may lead to the need to be seen less frequently, the patient's wishes will

be respected. There are also times when clinical issues prompt a patient to wish to be seen less frequently that might be optimal. This will be addressed in session but, ultimately, this is the prerogative of the patient and will be respected.

Patients are expected to give 24 hours notice if they are to cancel an appointment. Failure to do so without an accepted excuse will result in a second offense charge of \$100.00. Allowable excuses for failing to give appropriate notice as well as the charge for doing so are outlined in the Patient Services Agreement which patients are required to read prior to the first appointment. They also indicate their understanding of this policy when they sign the Initial Services Agreement at the first appointment.

Sessions run from 50-55 minutes and if a patient is late, for any reason, the stop time will be honored so as not to inconvenience other patients on the schedule.

Office Duties

Housekeeping/Cleaning, website management, writing and typing correspondence, mailing of invoices, sending records, faxing, emailing, phone calling, paying bills, paying state/local and federal taxes will all be done by the owner/therapist.

Preparation of federal taxes as well as tax consulting will be done by Karen Clark CPA., of Surrency, Clark and Colyer, CPAs. A Professional Business Agreement (PBA) exists although there will be no need to share PHI.

Building maintenance (pest control, repairs, fire inspection) will be the responsibility of Six/ten Corporation – the owners of the Beymer Building. No PBA required.

Banking will be done at Citizens Bank and Trust of Winter Haven, Florida. No PBA required.

Malpractice Insurance will be obtained through HPSO and liability insurance from Ewing, Blackwelder and Duce. No PBA required.

Office Hours/Closures/ Security

Counseling sessions are scheduled Monday-Thursday from 9:30-4:30 with a one hour break from 12:30-1:30. Appointments may be available at other times when deemed necessary.

Closure due to emergencies or inclement weather such as hurricanes, tornadoes, power outages or other disasters will follow the closures advertised by the Polk County School Board and such closures will be noticed on the office website and on the office voicemail.

Security

The office is locked at all times when the therapist is not in and is only opened with the use of a swipe card. For appointments outside the usual office hours it will be necessary for patients to use the security keypad at the street entrance to the building. Their identity will be verified through the video monitor and they will be given access to the building.

Winter Haven Police Department and Winter Haven Fire Department will respond to emergencies. Winter Haven Hospital is the closest Emergency Department.