First Session Procedure

Prior to the session
- decide if you will use paper files or electronic.
- prepare client file – assessment pro forma ready and if a sleep client, insomnia education handout.
- Check if there is a paper referral in your pigeon hole or attached to the patient’s electronic file.
- Different appointment types are coded via colours in Cliniko.
  - Orange: initial session for non-sleep clients.
  - Green: initial session for sleep clients.
  - Light Blue: ongoing sessions (these are not coded according to sleep/non-sleep).
  - Mauve: Telehealth (see separate document on Telehealth appointments).
  - Pink: tentative appointment waiting confirmation
  - Dark Blue: patient swapping clinicians or re-engaging in therapy (eg after a 6 month period).
  - Yellow: 30 minute appointment.
- Always check the patient’s Cliniko file a few days prior to the appointment – check for referrals letters, any background information, and information about billing (eg mental health care plan, St John Ambulance, DVA, private etc). Check for this information in file attachments, communications, and notes.
- For Telehealth clients (pink colour) – check if they are being billed under Medicare or private, or St John Ambulance etc. This information will be in the Cliniko appointment notes. Please see Telehealth Consults doc. for Telehealth criteria.
- Our admin team will endeavour to phone new clients to confirm their appointments as a means to reduce DNA rates. Admin will leave a note in the Cliniko appointment notes to confirm if this has been done.
- For clients who have booked online who have had no personal contact with the clinic so far - phone them prior to the session to introduce yourself and/answer questions – e.g. ‘I'm XXX from Jeffery &Ree / Sleep Matters and I’m pleased to confirm your appointment on XXX at XtimeX’ I’m just calling to quickly introduce myself and see if you had any questions before your appointment?’ ‘are you being referred under a care plan, if so please remember to bring the plan with you on the day’. We find a phone call improves the DNA rate for appointments booked online.
  - If you are only able to leave a message, ask them to phone 6107 6828 if they have any queries prior to the appointment.

Starting the session
Welcome the client, orient to the first session – ‘the session will be an opportunity for you to tell me what has brought you in, and for me to ask you questions so I can formulate a treatment plan for you. If I can give you suggestions from the get go today I will, but sometimes it is session 2 before we really get into the treatment’. Please use the session to ask questions and to think about how you feel about us working together. I’ll give you feedback at the end and ask for your feedback too.

- Ask if they have brought in their forms from us and or referral/care plan.
  - If no forms, print for them to complete in waiting room after (they can leave the forms in an envelope on the brown reception desk) or take with them to complete at home. Check that we have the correct email address if forms weren’t received.
  - If no care plan, check if they will be using private health insurance for a rebate - this may already be noted on their patient information sheet.

- Quickly check understanding of the cancelation policy – ‘we hate to charge a cancelation fee, so please do be sure to give 48hrs notice if you need to change or cancel any appts’. You will receive an email and/or SMS reminder 3 days before your appointment.

**End of session**

- Seek feedback: ‘was there anything that I haven’t asked that you were hoping to speak about?’ ‘how did we do today?’

- Provide feedback and sense of hope (if referral appears appropriate): ‘thank you for all the information you’ve provided me with today’, ‘given what you have told me so far, I feel that we need to work on xyz, which are things I believe I can help you with’

- Enter referral details into Cliniko: Go into the patient, click ‘edit’ (top right corner) and in the ‘extra invoice information’ box, enter refereing Dr name, provider number, and referral date. This way these details will print on any invoice/receipt that you raise for the client (i.e. you only have to enter the details once).

- Book in the next appointment before creating the invoice. This way the next appointment will be printed for the client on the bottom of their receipt. Click the clients current appointment and click ‘book another’ to make the next appointment.

- Now click the current appointment again and then ‘add payment’ to go through the invoicing.
  - If the client is claiming via DVA or an employee assistance program (eg St John Ambulance)- the invoicing/billing is a little different, let Paul or Melissa know and we will walk you through it.

- Under ‘item’ select the appropriate billable item for the appointment – for care plan referrals this will be the 80010 code (either initial or standard consultation). The private health fund codes are 100 for initial and 200 for subsequent. Medicare Telehealth is 80011. St John will also appear as a billable item.
Click 'create invoice' at the bottom of the page.

Take the payment – this will usually be eftpos/credit card. We can accept cash and cheque also.

Click ‘save payment’ and print out or email the receipt.

If the client is a child – put the parents name in the ‘invoice to’ box in the patient details section in Cliniko (for Medicare or private health claims the parent will be the account holder).

- We can use HICAPS on the eftpos terminal to facilitate on the spot claiming for Medicare and private health funds.
- For eftpos terminal instructions see [HICPAS terminal users guide](#)
- If you are not doing on the spot claiming: For care plan referrals: advise that the client can take their receipt to a Medicare office or submit via the Medicare app (they take a photo of the receipt and send it in via the app).
- Clients are entitled to 6 sessions before the GP reviews/re-refers them. At session 6 we must write a letter to the GP summarising treatment so far and if required, requesting a referral for the additional 4 sessions (10 sessions max per calendar year).
- Many of the private health funds have apps for online claiming also.

**After the session**

- Write a brief letter after session 1 – see examples on Cliniko. Brief summary of presenting concerns and expected treatment plan/goals. We’re wanting to communicate with the referring Dr quickly after session 1 so that they know the patient has been seen and the outcome of the appointment. This is important for building a good working relationship with referrers.
  - It can be useful to label the file so that you can easily see what it is in Cliniko – eg ‘Mary Smith S1 GP letter May 2018’, Mary Smith S6 GP letter July 2018’
  - Please enter the referring Dr’s details into Cliniko ‘Contacts’ when you write the letter. Contacts can be found the panel on the left of the Cliniko screen. Enter name, address fax number, and practice email if provided. We are wanting to build a database of our referrers. Once the contact has been created, link it with the client they have referred. Go into the client, click ‘edit’ and scroll towards the bottom to ‘referring Dr’ and ‘referral type’ - click on the doctor you have just entered.

- For the outside room at Subiaco
  - Door tip – snib the door locked and pull it very firmly to the closed position when leaving – it can feel quite stiff.

**In case of DNA**

- If the client does not attend – call or SMS them after 15mins to check if they are OK. “we had an appt scheduled for 10.30 today, I hope everything is OK?”
• Click on the appointment in Cliniko and click ‘did not arrive’
• Follow-up with a phone call or email that day. Remind that we do need to charge for missed appointments (unless there are exceptional circumstances). If no reply, after 1-2 days send invoice.

For further information regarding Medicare rebates, please see the *Better Access Survival Guide*

**Eftpos machine**
- If error message says low signal strength (red) try re-booting the machine by holding the red cross button down (the machine will beep until it turns off). It will turn back on again by itself