

Ready to reach out?

This is a quick guide to making your first appointment with an off-campus therapist and/or medication management provider. Each clinician or office will have their own policies and procedures on what they may request to get the process started - it's important you read and follow those policies.



Helpful Tips for getting ready to call or email:

- If you're using insurance, make sure you have a photo or copy of your most recent insurance card (front and back) or the physical card on hand. If the policy is through someone else (a parent, guardian or partner) it may be helpful to have their name and date of birth, as this is sometimes required to check benefits.
- Make sure you know your availability for appointments. If it's helpful, you may want to have a calendar with your availability or a planner.
- It may be helpful to have a brief statement ready about the reasons you're seeking therapy, and for your preferences for a therapist. An example can include "I'm looking to work on coping skills for anxiety" "I am looking for a trauma informed therapist" "I'm looking for a therapist with therapist trained in XXX modality". If you're seeking services in a larger office, with multiple therapists and have one specific therapist in mind you can make sure to have that information for when you're ready to call or email.
- If it's helpful, you can create a script for any phone calls - some information to speak with someone about making an initial appointment or leaving a voicemail can include: your name, best phone number to be contacted at, what services you are looking for (individual therapy, group therapy, and/or medication management), and your insurance information. An example of a voicemail may sound something like: "Hi, my name is XXX. I'm interested in starting weekly therapy appointments. I am usually available on X days and X time for appointments. My insurance is XXX. I can be reached at XXX-XXX-XXXX. Thank you."
- If you want to send emails out to clinicians or offices, you can include similar information as above. An example of an email may ready:

"Subject: Inquiry about availability

Hi,

My name is XXX and I'm interested in seeing if you have availability for individual therapy/medication management/group therapy? I'm wanting to use my insurance for visits, which is XXX. My availability for appointments is XXX. I can be reached at this email or at the following phone number XXX-XXX-XXXX

Thank you,

XXXX"

- Some offices may also have forms on their websites to submit inquiries, or specific instructions on what to include in an email or voicemail.
- Once you reach out, some therapist may have automatic replies that give you a time frame for when they usually respond (ie. 48 hours, 72 hours business hours).

Other Helpful Tips:

- If you're leaving voicemails and requesting calls back, make sure you have your voicemail box set up and memory space to receive messages. Some providers may not leave messages if the voicemail does not have a name as an identifier.
- Make sure to check your spam or junk folders if you are sending emails to providers, some emails may accidentally get filtered to the wrong folders.
- If you set up an initial appointment, make sure to review and complete any requested paperwork prior to your first appointment.
- Some providers may request that you call your insurance company to confirm your benefits. They may give you their NPI (National Provider Identifier) number and specific billing codes to call your insurance company with to confirm your coverage.
- If you're attending a telehealth appointment, make sure you have a private and quiet space for your appointments. Make sure you are not actively driving or in a public space during the telehealth appointment.