

Say it Like a Pro



Essential Scripts for Private Practice Therapists

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Hello Therapist

Private practice requires us to wear many hats, therapist, business owner, biller, scheduler, etc. Learning to navigate these roles takes time, and we often feel awkward, afraid, or unsure when we first start. Over the last decade, I've perfected my favorite phrases, one-liners, templates, and scripts. And now, it's my honor to share these with you. Feel free to copy these scripts or adapt them to your unique practice needs. Enjoy!

-Kelley



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CHAPTER 1 - EXPLAINERS

What to say...



...when explaining cash pay to clients

I charge _____ for a 50-minute session and I accept cash, checks, and credit cards at the time of the appointment. I do not bill insurance; however, I provide you with a superbill at the end of each month that you can submit to your insurance company. Before booking an appointment, I suggest calling the number on the back of your insurance card, inquiring about your “out of network” therapy benefits and learning about how to submit an out-of-network reimbursement claim.

...when a client asks what a superbill is

A superbill is a detailed invoice outlining the services a client received. Therapists may need to generate a superbill when they are not on a client’s insurance company’s panel. The client submits the superbill directly to the insurer, giving the insurer all the information they need to pay the claim.

...when explaining why you don’t accept insurance

Thank you so much for asking this important question. Unfortunately, many therapists, including myself, can’t afford to accept the reimbursements that insurance companies offer while still providing the quality of care we believe our clients deserve.

...when explaining to a client the importance of completing their intake paperwork before the first appointment

Hi [first name].

I just wanted to check in to make sure you got the paperwork I sent over. I'm looking forward to our appointment tomorrow at [time]. In order for us to have this session, I do need the paperwork to be completed.

Please feel free to email it back to me or let me know if you'd like to reschedule our appointment to a later date.

...when you have no more sliding scale spots, but a client is requesting one

Thank you so much for asking about sliding scale spots. I keep [enter number here] sliding scale spots on my calendar at all times. Those spots are currently full. I can put you on a waiting list for when one becomes available. However, I would also consider checking out [Open Path Psychotherapy Collective](#). Open Path helps clients find therapists who provide affordable, in-office and online psychotherapy sessions between \$30 and \$60 (between \$30 and \$80 for couples & family sessions). Also, I can email you a list of affordable therapy services in our community.

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CHAPTER 2 - CLIENTS (+)

What to say...



...when returning client's phone calls

I love sending clients voice memos for this first message. It feels more personal and cozy and few people take the time to do it. I find that my rate of conversion goes up more quickly with a voice memo instead of a plain text. This script will work just as well as a text message.

Hi _____. Thank you for reaching out. Let's set up a time to chat over the phone and discuss whether I am a good fit for you (your child, your family etc). I have availability at ____, ____, and _____. Would any of these times work for you to hop on a 15-20 minute call?

...when scheduling the first session

Hi _____. I'm so glad we connected. You mentioned on the phone that you are looking for a therapist for _____. When I do these calls I find that it works well if you tell me a bit more about what brings you to therapy and what you are hoping to get out of therapy. Then, I'll tell you a bit about my practice and answer any questions you have. If for some reason, I'm not the right fit or you are looking for something different than what I provide I'm happy to help you work through the process of finding someone who is the perfect fit for you.

...when you wrap up the first session and realize the client isn't a good fit

After having more time to talk today, I realized that I am not the right clinical fit to address the [presenting issue] that you are facing. It is important that we find you a therapist who is excellent at treating [presenting issue], and unfortunately, that isn't me. I am going to think about this and email you three referrals tonight for therapists who I think would be a better fit.

If the client pushes back or gets frustrated:

I really hear what you are saying, but after years in this field, I see the importance of both the therapist and the client feeling that this is a good fit.

If the client has a very challenging time accepting this news, I often add:

I realize that I should have realized this on our consultation call, so I am not going to charge you for today's session, and I will help you find someone who is a better fit.

Why do I offer to return their fee or not charge?

Honestly, it's easier than dealing with someone who is upset that they "wasted" their money on someone who isn't a good fit for them. Although you technically could keep that first session fee, I'm a believer in leaving clients with a good experience. I want that client to feel like I met them, realized they weren't the right fit, and then helped them find someone else who was. Communities are small, and I've seen that this kind of goodwill can go a long way. It also prevents the client from spreading the news online that you

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CHAPTER 3 - CLIENTS (-)

What to say...



...when a client wants to cancel a session less than 24 hours in advance

1st time: Thank you for letting me know that you need to cancel your session today. I give all my clients one free pass on my late cancellation policy, so I will go ahead and cancel our appointment today. However, I will have to charge for this in the future.

2nd time: Thank you for letting me know. I give all of my clients one free pass on my late cancellation policy. Unfortunately, you used yours on [date]. Would you still like to cancel this session and pay the full fee? Or would you like to find a way to come in?

...when a client hasn't paid for a session or has an outstanding balance but wants to book another session

I would love to book another session. However, it is my practice policy not to book another session without settling up my client's remaining balance. This guarantees that we maintain good boundaries. Would you like to settle up with cash or a card today?"

...when a client keeps calling between sessions

Over the past couple of weeks, we've had a chance to touch base between sessions. As I mentioned in our paperwork, I do bill for supportive phone calls. I won't bill you today since I'm just now reminding you of my policy. However, let's schedule additional sessions or plan on billing for mini-phone sessions if you need to speak between sessions in the future.

...when a client-no shows for their therapy appointment

First, I list my late arrival policy in my paperwork:

If you are running late, please get in touch with me right away to let me know if you are on your way. If I have not heard from you within the first 20 minutes of your session, I will assume that you are a "no-show," your session will be forfeited, and you will be billed at your full rate (even if there is time remaining in your session).

The first time a client no-shows I send them a text saying this:

We had a session scheduled for 9 am and it is now 9:20 so I'm going to head out. I give all my clients one free pass on my no-show fee. However, next time I will have to charge you. I hope you are doing okay, and I'm looking forward to seeing you next week.

The second time a client no-shows I sent them a text saying this:

We had a session scheduled for 9 am and it is now 9:20 so I'm going to head out, and I will have to charge you for today's session. I hope you are doing okay, and I'm looking forward to seeing you next week.

If they press back against this boundary:

As you know, I give all my clients one free pass on my no-show policy. Unfortunately, you used this free pass on [date]. I know that having me set this boundary can be frustrating. I would be happy to discuss this in our session next week.

Will some clients leave because of policies like this?

Yes. Some clients will get frustrated. Some clients will leave. And some clients will respect your policy. And this is where you need to use your best clinical judgment. There is a difference between a client who genuinely messed up and forgot your session and a client who chronically no-shows. You must use your clinical skills to determine what boundaries are right for you and the population of clients you see.

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CHAPTER 4 - BUSINESS

What to say...



...when recording your private practice voicemail script

You have reached the confidential voicemail of [your name], [license or job title]. If this is an emergency, please hang up now and call 911. I make every effort to return calls within 24 hours. Calls left on Fridays will be returned promptly on Monday. If you have not heard back from me within 24 hours, please assume I didn't receive your message and call me back. I look forward to speaking with you soon.

...when you need a social media policy

Due to the importance of your confidentiality and the importance of minimizing dual relationships, I do not accept friend or contact requests from current or former clients on any social networking site (Facebook, LinkedIn, etc). I believe that adding clients as friends or contacts on these sites can compromise your confidentiality and our respective privacy. It may also blur the boundaries of our therapeutic relationship. If you have questions

...when a client's credit card is declined

Just want to give you the heads up that your card was declined. Do you want to use a different form of payment?

...when managing parents expectations for teens in therapy

I ask that you bring your teen to therapy once a week for a month. During that time, I suggest you drop them off and leave. Don't ask them tons of questions about therapy and don't expect to see results right away. During these first four sessions, it's my job to establish trust with your teenager.

You are welcome to send me email updates, but I'll probably only send you an email back that says, "Thank you so much for this information." At the end of this month, your teen will invite you back into the therapy room and share with you what they need your help with and what they don't need your help with.

After that, we can discuss, together, how often you want your teen to come to therapy.

...when you want to communicate a fee increase to your clients

I raise my therapy fee once per year to accommodate for inflation, advancements in my training, and increased business expenses. Four weeks from now, you'll notice a \$15 increase in your session charges. Please don't hesitate to let me know if you have questions or concerns.



CHAPTER 5 - COMMUNITY

What to say...



...when cold calling a doctor's office to book a meeting

Hi, my name is _____. I am a therapist with an office down the street from (enter doctor's name here) . I refer a lot of my clients out to (type of doctor), and I've heard great things about Dr. _____. Would it be possible for me to bring in lunch for the whole office and meet with Dr_____for fifteen minutes or so?

...when cold calling a school counselor to book a networking meeting

My name is [your name]. I have a psychotherapy office close to your school. I often have your students in my practice. I'd love to stop by, introduce myself, get a copy of any release paperwork you have, and discuss ways we can collaborate. I'm hoping we work together to provide kids with a circle of support.

...when cold calling another therapist to book a networking meeting

My name is [your name]. I am a [license or job title] in [state of licensure or city of office]. My practice is focused on [niche]. I am taking on new clients (zoom or in person). Please explore my webpage and I'll look forward to speaking with you soon.

...when you want to tell another therapist you sent them a referral without being awkward

Hi [therapist name]. I sent a client your way with the initials [client initials]. If they call, get a release, and I'd be happy to fill you in on the clinical details of this case. Thank you for all the work you do to serve [client initials] in our community!

OR

Hi [therapist name]. I referred a client with the initials [client initials]. I thought of you because this client struggles with [niche]. I hope they give you a call. Thank you for all the work you do to serve [client initials] in our community!

...when you received a referral from a doctor

To: Example Doctor

Subject: Thank You

Dear [Example Doctor],

Thank you for referring [client initials] to my private practice. I've secured a release and attached it to this email. I'm writing to ask what type of clinical updates you prefer moving forward. I'd be happy to send weekly emails, faxes, or schedule phone calls. Just let me know what is best for you. Thank you for your trust in me with this client. I look forward to working together on this case.

Warmly,

[Your name, license, and contact info]

...when sending a thank you card for a referral

Thank you so much for putting your trust in me. As a therapist, a referral is the best compliment I can receive. I appreciate the work you do for clients in our community, and I'll be sure to keep your practice in mind when I'm referring out clients who [niche].

...when you received a referral from a doctor

To: Example Doctor

Subject: Thank You

Dear [Example Doctor],

Thank you for referring [client initials] to my private practice. I've secured a release and attached it to this email. I'm writing to ask what type of clinical updates you prefer moving forward. I'd be happy to send weekly emails, faxes, or schedule phone calls. Just let me know what is best for you. Thank you for your trust in me with this client. I look forward to working together on this case.

Warmly,

[Your name, license, and contact info]

...when sending a clinical update to a doctor or
another therapist

Dear Dr. [Name].

I'm writing to give you a clinical update on our shared client [client initials]. Over the past few months, I've noticed that [client initials] has struggled with _____, _____, _____. A few interventions I've utilized are _____, _____, _____. I'd love to collaborate and discuss ways that we can help this client move forward in their treatment.

Do you have any suggestions on things you would like to see [client initials] work on during therapy? Do you have any additional information you think would be important for me to know? Thank you for your continued support on this case. I look forward to connecting soon.

Warmly,

[Your name, license, and contact info]

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