On Call: Best and Minimalist Practice:

Best Practice:

1. Choose a day when you have some time to be on the phone.
2. Set your phone.com account to ring your cell before it goes to voice mail during your on call business hours.
3. Answer every call you can.
4. Respond to the others within four hours.
5. Even when you think you know who a call goes to, let the client know you have forwarded their call to that person (e.g. "I forwarded your call to Janie, who does our english DA evals)

Minimal Practice

1. You're probably seeing clients while you are also on call and have little time between sessions. Hopefully you have a break scheduled or a no-show mid day so you can return some calls.

2. Respond as soon as you can.

3. IF you have NO DOUBT where this message needs to go (e.g. "I'm needing to talk to Rebekah about her co-parenting class), you can forward the email message directly to Rebekah.

If you have ANY DOUBT (e.g. "I'm looking for the parenting class" could mean Rebekah's co-parenting class OR it could mean they were told by CPS to do a parenting class and they got their phone numbers mixed up), you need to call the client before forwarding the message.

4. Make sure all clients are handled by the end of the day.

On Call: What do I do?

Your job: is to match caller's needs with CCD resources.

Step 1: Why did they call? If you are hungry for clients, you should use your empathic reflective listening skills as they describe the challenge they are seeking help for. If you do that, they are more likely to choose you when the pick a therapist step comes in. Once you know this info, the flow chart is as follows:

Single Destination calls - These are the calls that you don't have to think hard about, you just have to get them to that place. A) transfer to a specific therapist/Family Tree Program they are looking for, B) "show" them where to go to register online for theft intervention or C) send them to the only therapist that performs the service they are looking for (e.g. Mediation, English Speaking Drug and Alcohol Assessment)**.**

Client's Shopping for a Therapist - After you have heard the reason for their call, you want to gather the following specific information:

- referral source (if you don't ask, you won't know it's a CPS case and that they can only see someone on that contract)
- which location they prefer
- when they can attend
- what the pay source will be

Once you have this information, they have several options.

1. They can see you if this a good match.
2. You show them how to shop at our website:

"Have you had an opportunity to look at our website and see if there is a therapist that you thought might be a good match for you?"
"Why no! How do I do that?"
"Once you select a location, you can click the little down arrow after their name and learn all about each therapist. Once you see one you like, just shoot them an email to see what their availability is. Since you are self pay, you can choose any therapist you like."

Or

"If you click on Therapists, then click on Specialties, you will see that one of the Specialties is Therapists on the CPS contract/Couples/Bilingual. You can click the little down arrow after their name and learn all about each therapist. Once you see one you like, just shoot them an email to see what their availability is.

Or

"It looks to me like Janie, Brittany and Jake are all on your insurance. If you go to our website and go to the Therapist page, you can click the little down arrow after their names and learn all about each therapist. Once you see one you like, just shoot them an email to see what their availability is."

3. You can refer to a specific therapist. On a good day, therapists with openings will have emailed you because you are on call and you will spot a good match.

4. You are helping the client shop because they are too overwhelmed to shop, or because they don't have internet. "When I use the search bar at our website and put in Grief, Crystal's name pops up in Farmer's Branch." or "we have several therapists in Lewisville who could work with depression. Rebekah does have some weekend availability."

5. You are going to email for therapist's availability. If there are several possibilities and you are going to help the client find the first available. "Janie and Rebekah are both members of AFCC. Would you like me to see who has the soonest availability? Let me get your email, so I can let you know when I hear back from them."

6. You are going to make an "anyone" email and see if any therapist wants a self pay borderline client in Farmers Branch. This is less effective than emailing a couple of specific therapists that you think may be a match. You risk getting no response if you send an "anyone" email. If you choose this path, it's your job to email the client at the end of your effort and tell them you had no takers.

Closing the Deal

Once a therapist is picked, you have to make that last connection.

So it sounds like you would like to see Joey. Would you like me to transfer you to his extension? [You can only transfer a call if you picked it up live]

Or

So it sounds like you would like to see Joey. Would you like to email him for an appointment or would you like to call him or would you like for me to email him and cc: you? Whichever is best for you is fine with me.

Transfer a live call

***2**
extension or phone number you are transferring to followed by #
when the connection is complete, hang up.

Other Tips

1. Make sure you have read and understand how to handle CPS cases (see page 3).

2. Keep the CCD website on your screen so you don't have to remember everyone and everything.

3. Tell the client you are looking on the website and whenever possible help them look also

4. When you and the client have figured out that they want to see Brittany, ask them if they want you to email Brittany or if they would like to contact her. The super efficient way is to get the client to give you an email address and email them and the therapist in the same email.

5. If you aren't sure what to do with a call, ask Cindy or an associate!

Handling Family Tree Calls

Tune your ear to hear if it might be a call intended for Family Tree. It will save you time. "We're calling for free family counseling." "Our school counselor said to get our kid fixed." As soon as you hear this, you can ask - "Are you trying to reach the Family Tree program for free family counseling?"

1. If you are on the Family Tree contract and they are a good match for you, schedule them.

2. Otherwise, send to Cynthia, either by
   - *2 transfer or
   - "would you like to call her or would you like her to contact you?"

Handling CPS Calls

1. if you are on call and can get the person scheduled on your calendar, do it!

2. if not...I would tell the caller (client or caseworker) the following:

Here's how our system works (and sometimes doesn't work). Each therapist keeps their own schedule. So the client (or worker) needs to contact a specific therapist and make their appointment (and email the 2054). Direct them to our web page of all of the CPS therapists.

http://ccdcounseling.com/therapistsall/specialties/cps/

Tell them clients and workers can click on the arrow after their name and learn about them. When they see one that is a match, contact that therapist and schedule directly with them.

3. If the client is overwhelmed or doesn't have the internet, you should walk them through these decisions and tell them which extension to call.

That's how I think we should handle them, following are more thoughts on this topic, in case someone has better ideas....

As most of you know, our biggest problem is that most therapists on the CPS contract tend to be full all the time and aren't eager to get a new client. Hopefully Brittany will get her LPC finalized soon, which may help. We are looking for more fully licensed therapists that can take CPS and insurance referrals.

The mistake that can be made in our system is becoming a referral that no one feels any responsibility for. Here are two ways that happens.

1) If a 2054 gets sent to our admin people, they try to help by sending an email to the cps providers and saying “who can accept a CPS referral in Lewisville. This family needs an evening appointment.” OR

2. If the client calls and talks to the on call person and the on call person tries to be helpful by sending an email just like admin does. In both of these situations, every therapist is hoping that someone else has an opening, because they don’t have one for a couple weeks. So 50% of the time, no one responds and the on call person or admin is stuck holding this referral. The client thinks help is on the way, but they aren’t even on some therapists wait list.

IT IS VERY IMPORTANT THAT IF YOU TELL THE CLIENT YOU ARE WORKING ON FINDING A THERAPIST OR THAT SOMEONE WILL CALL THEM BACK AND YOU DON'T FIND SOMEONE, YOU NEED TO BE SURE AND CALL THE CLIENT BACK AND TELL THEM THAT. They can then be redirected to their case manager to get referred to a different agency.