Clinician Handbook

Your guide to a successful practice.

Table of Contents

Thank you for all that you do for our community. As you get started and grow in partnership with us, use this handbook as your guide to get answers to frequently asked questions and information on various topics, from using your portal to billing and claims submissions and client outreach best practices.

Core Resources

Connect with peers and get support.

Clinician Community

Our Community platform is a rich resource where you'll not only find a space to connect with colleagues, share your knowledge, and build connections, but access continuing education credits and join educational webinars (often led by your colleagues!).

Your SonderMind Community How-To: You can also access instructional articles that cover all aspects of the SonderMind platform, information on how to grow your business, and mental health resources.

Your support team: wellness coordinators

Our support team will help you with client account issues, billing/claim matters, as well as any technical troubleshooting needs. They can be reached between the hours of 7 AM–6 PM Mountain Standard Time at **support@sondermind.com** | **(844) 257–1461**.

Video telehealth guidelines

Browse through the following guides for all of your video telehealth questions:

- **Video Telehealth: How to Guide**

- **What Video and Audio Features Are Available with SonderMind Video Telehealth?**

- **Video Telehealth: FAQ**

- **Video Telehealth: Troubleshooting Guide**

Your Portal Tutorial

Tips for navigating your SonderMind portal

Access your portal online

Use your SonderMind portal to manage your current caseload and new client referrals, schedule appointments, conduct video sessions, track client progress through clinical questionnaires (CQs), host and update treatment plans, and more. **Login here**

Review these articles for support as you navigate your portal.

- **When, How and for What Services Am I Paid for as a SonderMind Provider?**

- **How Do I Make It Clear Whether or Not I Am Accepting New Clients?**

- **How Can I See Which Insurances I'm Credentialed with?**

- **How Do I Edit My Profile Information?**

- **What Makes a Great Profile?**

- **How Do I Set My Availability for Seeing Clients?**

- **How to Create a Business Phone Line?**

- **How Do I Add External or Existing Clients into SonderMind?**

- **This resource shares instructions for inviting clients to SonderMind.**

- **Resources for Your Practice**

  Find resources, tools, and insights for mental health care clinicians in practice with SonderMind.

For mobile access to your portal, follow these instructions: **How to Download the SonderMind for Therapists Mobile Application**

Wellness Coordinator Team

Your guide to billing and technical

Success with support

- Use your portal login email address when contacting support.

- Be specific in your requests to include:

  - Client initials

  - Dates of service (DOS)

  - Claims #s

Ground rules

- If onboarding (0-50 claims), please contact your onboarding coach for guidance first.

- Not sure who to contact?? Email **providersuccess@sondermind.com**.

Credentialing Process

Everything you need to know

Credentialing Hub

This is your one-stop-shop for all things credentialing, including updating your demographic information and finding answers to your burning questions.

- Credentialing: Frequently Asked Questions

- Insurance Benefit Verification: Provider, SonderMind, and Client's Role in the Process

- How Do I Add, Change or Remove a Practice Location?

- How Do I Add an Additional Professional License to SonderMind?

- How Do I Update My License Information After Renewing?

- How Do I Change My Name for My SonderMind Account?

- How Do I Obtain SonderMind's Professional Liability Insurance?

The Client Experience

Review these articles to learn more about our clients.

- **Streamlined Client Management: Understanding Your Client List**

  Your portal makes it easy to manage clients all in one place. Use this resource to learn how to understand and sort your client list.

- **Client Matching Process**

  This article will give you an idea of what to expect when we send new client requests to you.

- **What Information Is Stored in the Client File?**

  Learn about what's stored within the client file and how to navigate through and use this information.

- **Communicating with Clients Within the SonderMind Portal**

  This article shares how to contact clients within your portal quickly and easily.

- **How Do I Accept a New Client?**

  We make it easy for you to accept and communicate with new clients directly within SonderMind. This article tells you how.

- **How Do I Rematch a Client?**

  This article shares reasons to rematch a client, instructions and how to rematch a client who has had at least one session or more. Learn more about SonderMind clients.

Incomplete client portal

You may be connected with clients who have not completed their client portal. Not to worry — this is an opportunity to convert this connection to a client. Typically, their account is missing their insurance and payment information. You should still accept the client match if you'd like to speak with them.

We encourage you to still make that initial contact with the client in hopes that this outreach will prompt them to complete their portal. You can message them through the portal or use a phone call to encourage the client or talk about what they are looking to gain through therapy.

Clients asking for in-person sessions

If you're a "telehealth only" provider, you may still encounter clients who request an in-person session. This is okay, as it is still an opportunity for you to help them. You can let them know that they were likely connected with you because an in-person SonderMind provider wasn't available in their area, and that you can still help them with their mental health concerns through video telehealth. Having this conversation could help encourage these clients to feel more comfortable and move forward with video telehealth sessions.

What Does the Client See in Their Portal?

Watch this video to understand what clients see in their SonderMind portal.

What Does Your Provider Profile Look Like to Clients?

Watch this video to see what your provider profile looks like from a client's perspective.

Providing a Reason for Client Inactivation

Watch this video to learn how to provide a reason as to why you're inactivating a client in your portal.

Understanding the New Client Intake Process and Account Set-Up

This article defines our new client intake process and the purpose of a client account set-up.

FAQ: Client Preferred Name

Learn where to find a client's legal name and preferred name.

Clinical Questionnaires: The Client Experience

Watch this video to see the client experience for clinical questionnaires sent through the portal.

What Information Does SonderMind Collect from Clients?

See a list of the information we gather from clients upon intake.

What Disclosures Is SonderMind Collecting from Clients?

See a list of the three disclosure agreements we gather from clients during the sign-up process.

How Does the Client Matching Process Work?

Understand the details of how SonderMind connects you to new clients, what expectations are set for clients, and how you can optimize your profile to connect with the types of clients you're best positioned to treat.

Why Is a Credit Card Required During the Client Set-Up Process?

Learn how requiring credit card information in the set-up process makes it easy for you to get paid quickly.

How Can I Help a Client Struggling with the Cost of Therapy?

Get tips to help your clients lower their costs.

What Are the Self-Pay Rates for Clients?

See self-pay rates for clients based on state and licensure.

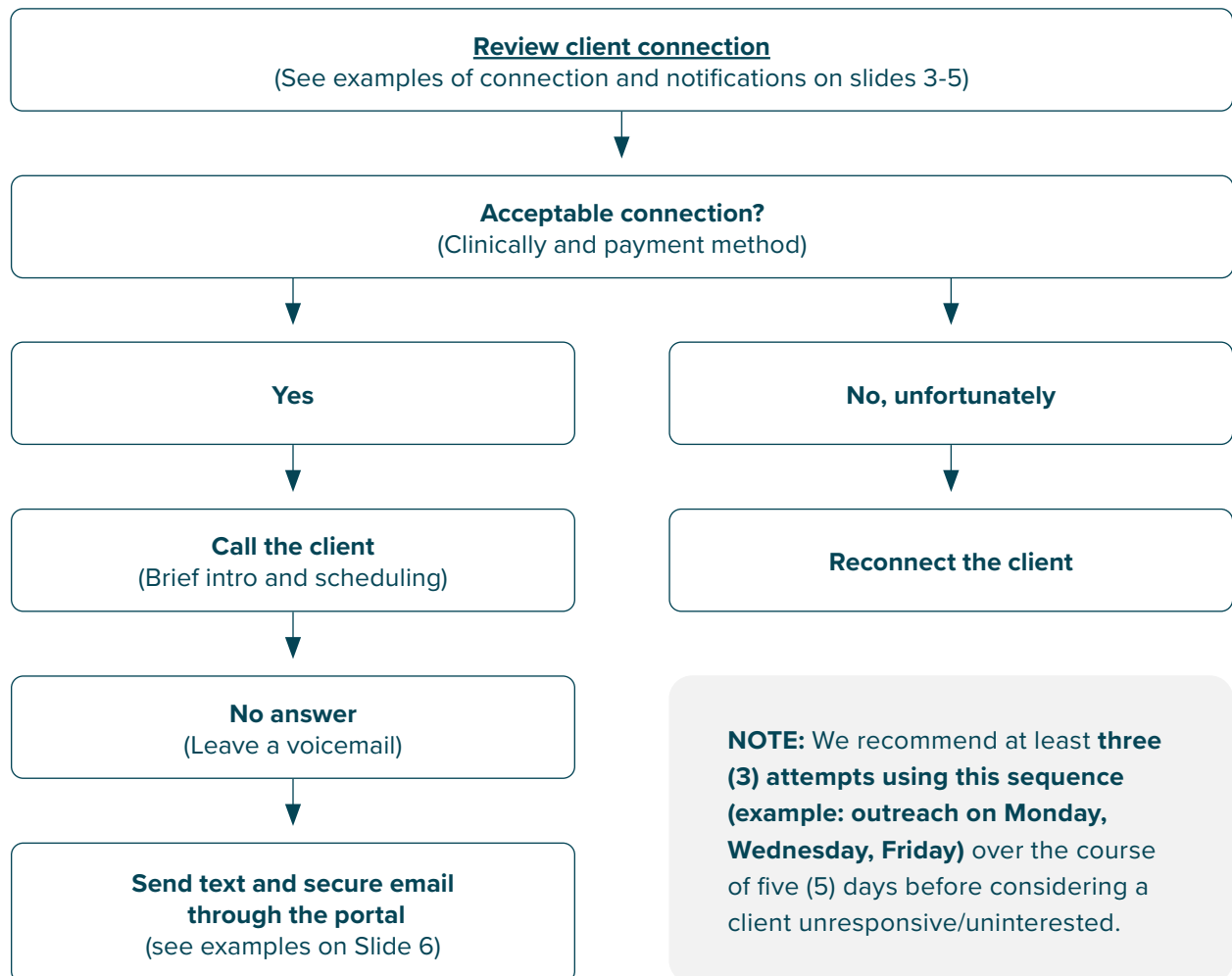## Billing: The Client Experience

Here we address a number of frequently asked billing-related questions to provide a peek into important client milestones between initial sign up to paying their copay for a session.

Outreach Best Practices

Follow these steps.

The why: We recommend using this sequence as a package, each step completed in sequence, to increase the likelihood of client response given variable schedules and health conditions. Some clients may have phone anxiety or only be available via email when you outreach.

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│                  Review client connection                        │
│  (See examples of connection and notifications on slides 3-5)     │
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│                    Acceptable connection?                         │
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│     Call the client     │        │    Reconnect the client │
│ (Brief intro and        │        └─────────────────────────┘
│  scheduling)            │
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│ Send text and secure    │
│ email through the portal│
│ (see examples on Slide 6)│
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NOTE: We recommend at least **three (3) attempts using this sequence (example: outreach on Monday, Wednesday, Friday)** over the course of five (5) days before considering a client unresponsive/uninterested.

Call the client

Brief intro and scheduling

Call opening:

Hi [CLIENT NAME] - My name is [YOUR NAME], licensed therapist with SonderMind. I see that we were matched and am reaching out to learn more about the support you need and to schedule our first session. Is now a good time to connect briefly?

Learn more:
*What brought you to SonderMind? *Use this dialogue as an opportunity to learn more about the support they need and highlight your specialties.*

Schedule the first session:

Determine their availability, take note, and schedule in your portal immediately after the call. Remind the client that they need to complete their account before you can schedule with them, if appropriate. Take note of availability and ask the client to message you through the portal when their account is complete.

Voicemail recommendation (if no answer to your call):

Hi [CLIENT NAME] - My name is YOUR NAME, licensed therapist with SonderMind. I see that we were matched and am reaching out to learn more about the support you need and to schedule our first session. Please give me a call back at XXX-XXX-XXXX or email me at yourname@gmail.com. Looking forward to hearing from you soon!

Secure portal messaging and text message

Try them out, we know they work. Clients are five times more likely to schedule.

Hi [CLIENT NAME] - My name is [YOUR NAME], licensed therapist with SonderMind. I would love to connect on a brief call to learn more about how I can support you and schedule our first session. Please reply to this text message, call, or send me a message through your client portal to schedule this call. Thank you!

Hi [CLIENT NAME] - My name is [YOUR NAME], licensed therapist with SonderMind. I see that we're a great match, I'm looking forward to learning more about how I can support you. Let's schedule our first session! Please reply to this text message, call, or send me a message through your client portal to let me know when you are available. Thank you!

Hi [CLIENT NAME] - My name is [YOUR NAME], licensed therapist. We were matched through SonderMind. Have you had a chance to review my profile? I'd love to schedule our first session so I can learn more about the support you need! Please reply to this text message, call, or send me a message through your client portal to let me know when you are available. Thank you!

Scheduling

Best practices for scheduling clients

Client Scheduling Standards and Expectations

Read this article to familiarize yourself with the standards and expectations for scheduling SonderMind clients.

How Do I Schedule the First Appointment for a New Client?

Read instructions for how to schedule a first appointment in your SonderMind portal.

How Do I Sync My External Calendars with the SonderMind Calendar?

Watch this video for instructions on how to sync your calendar.

How Do I Cancel or Reschedule an Appointment on the Calendar?

Read this article for step-by-step instructions.

Direct Scheduling: Frequently Asked Questions

Learn more about how direct scheduling works and why this may be beneficial for your practice.

How Do I Handle No-Shows or Late Cancellations?

This article covers how to submit a no-show or late cancellation claim in the SonderMind portal.

Documentation

Consents, client notes, legal documents

Informed consents

Sondermind consents and disclosures are a simple and secure way for providers to share legally-required consent documents with clients for reviewing and legal agreement.

Please review the articles below to see how providers can use these built-in forms.

- Sending and Signing Legal Documents with SonderMind Consents and Disclosures

- Preparing Your Client Disclosure

- What Disclosures Is SonderMind Collecting from Clients?

- 3 Common Misconceptions About Informed Consent Documentation

- Introducing the Baseline CQ: A Starting Point for Your First Session with New Clients

While these forms are available, you're not obligated to use them. If there are other forms that you would like to incorporate into your individual practice, please feel free to do so. You may also access your own documentation/email platform. However, the platform that you choose must be a HIPAA-compliant documentation/email platform.

HIPAA-compliant email platform

If you choose not to use our platform to send your individual consent documents, please look into HIPAA-compliant email platforms to use with SonderMind and your independent practice. There are many to choose from, but these are the most recommended by our community.

- Amazon Chime

- Cisco Webex Meetings/Webex Teams

- Doxy.me

- Google Workspace (Google G Suite Hangouts Meet)

- PandaDoc

- Simple Practice: Offers informed consent templates and is the most commonly used platform.

- Skype for Business/Microsoft Teams

- Therapy Notes

- Updox

- Virtru

- VSee

- Zoom for Healthcare

Client notes

Your notes are "protected" within the Sondermind portal. Read the articles below for more information.

- **How Do I Write, Download, and Print My Client Notes?**

- **Video Resource: Your EHR and Client File Explained**

- **How to Handle Documentation for Clients that Are New to Sondermind but Not New to Your Practice**

Claims Submission and Billing

Step-by-step instructions and more

How Do I Navigate the Claims Tab?

This article will guide you through the different sections of your claims tab.

How Do I Submit a Claim for a Session?

Read this article for step-by-step instructions.

How Do I Bill for a Client Using an EAP Benefit?

Read through these frequently asked questions to learn more about billing for a client using an EAP benefit.

Why Is a Client's Account Not Eligible for Claim Submission or Scheduling?

Read through this article to understand when this may occur and what you can do to quickly resolve the issue.

Psychotherapy CPT Codes

This cheat sheet has a list of Current Procedural Terminology (CPT) codes that are available to therapists to bill through SonderMind, including their descriptions.

How Do I Delete a Claim?

There are some instances in which you may need to delete a claim, i.e. a client is a no-show/cancels late and you don't want to charge or you accidentally created duplicate claims for a session. Here are step-by-step instruction on how to delete a claim.

What Do I Do If My Claim Expires?

Here's what to do so you can submit an expired claim.

Self-pay

The articles below address self-pay and can help you with client discussions. Self-pay rates are based on the state and your licensure (i.e. LPC, LCSW, etc.). Please take note of the CPT code that you will use when you submit your claim. Also, please keep in mind that clients can be "self-pay" until you are credentialed with their insurance.

- **What Are the Self-Pay Rates for Clients?**

- **Psychotherapy CPT Coding Guide**

- **Video Resource: How Do I Submit a Claim (Insurance or Self-Pay)?**

Sliding scale

We understand that helping clients afford services is important to our providers. While we don't offer a sliding scale at this time, we encourage you to work with clients to find alternative financial solutions. Shifting sessions to bi-weekly or meeting for 30-minute sessions instead of 60-minute sessions can reduce costs for clients. Read the article below to learn more.

- **How Can I Help a Client Struggling with the Cost of Therapy?**

ICD and CPT code assistance

Use the articles below as a guide for ICD coding and CPT coding.

- **ICD Coding Guide**

- **Psychotherapy CPT Coding Guide**

Couples/group therapy

Please know that our telehealth platform doesn't currently have the ability to do three-way video calls, so clients in couples or group therapy will either need to be together during the session and use one device or you can use a different HIPAA-compliant platform.

- For client registration: All clients will need a separate SonderMind completed account so they can be sent the informed consents and be scheduled for the same time slot.

- For billing: Only one claim will be submitted under one account. Typically, this will be the policy holder on the insurance (if they are using insurance as their payment method). Billing under multiple client accounts for the same session is prohibited by SonderMind policy and the SonderMind insurance contracts.

  - Since the family members or individuals of the couple are participating in the same session, this would be considered the same service rendered. Billing for the same service rendered more than once under different individual's accounts would be against insurance regulations.

  - Simply delete the claims auto-generated for all other family members/ parties in the session.

How Can I Treat Couples and Groups Through the SonderMind Platform?

This article will outline how to handle couples or group therapy from within the SonderMind portal.

Clinical Resources

Resources, tools, and insights

The Golden Thread: Using Medical Record Documentation Templates
This article explains what the Golden Thread is and how to use the right templates to document it.

FAQ: EHR and Medical Record Documentation
Learn why all claims submitted through SonderMind must include documentation.

Clinical Documentation Standards: Best Clinical Practices
Watch this webinar to get an overview of clinical documentation standards.

Introducing the Baseline CQ: A Starting Point for Your First Session with New Clients
Learn all about the Baseline CQ, how it's sent to clients, and why it's important.

What Are SonderMind Clinical Questionnaires?
Read this article to learn what CQs are distributed to clients through SonderMind.

How to Manually Send Clinical Questionnaires
Learn step-by-step instructions for manually sending CQs through your SonderMind portal.

About the Client Clinical Profile
Read through this article to learn more about the details of the client clinical profile.

Accessing Clients' Clinical Questionnaire Results
The questions in this article will help you gather information on how to access high-risk clients' clinical questionnaire results.

DSM-5-TR
Watch this short video to review the systematic text revision of the DSM-5-TR.

Discharging Clients: Clinical Best Practices
Watch this video for more information on when and how to discharge clients, and access a discharge summary note template.

Preferred Provider Groups

- Military Veteran Preferred Provider Group

- Urgent Client Preferred Provider Group

SonderMind collaboration with University of Denver for research efforts

SonderMind Partners with University of Denver to Improve Client Outcomes

Audio trainings

Through SonderMind University, you have access to courses created specifically for SonderMind providers in audio format. This format allows you to engage away from a computer screen. These generally are approximately 60 minutes in length and include demonstrations of core techniques within evidence-based practices, as well as a SonderMind provider interview exploring how to incorporate these best practices into your work at SonderMind. Examples of audio training topics include:

- Suicide risk management

- Feedback-informed care

- Prolonged exposure therapy

Audio tips

You will also have access to short courses created in audio format which convey practical information regarding your practice at SonderMind. Audio tips will generally be approximately 10 minutes in length. An example of an audio tips course is "Self-Marketing as a SonderMind Provider."