

Osika & Scarano Psychological Services, P.C.

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First Session Checklist for Providers

1. Track down new patient packet, COVID informed consent, and psychosocial history.
2. If any are missing, be sure the patient's email is in Practice Mate, and ask Heidi to resend.
3. Duplicate Session #1 Progress Note, Progress Note, and Diagnostic Treatment Plan for patient's chart.
4. Complete Session #1 Progress Note and the Diagnostic Treatment Plan for each first date of service.
5. Put Diagnostic Treatment Plan in Practice Mate under the Template tab.
6. Fax to Primary Care Physician the Diagnostic Treatment Plan after Session #2, as long as a Release of Information is signed.
7. After the new patient packet, COVID informed consent, and psychosocial history are copied into patient's chart, ask Heidi to move them to the trash.
8. If the new patient packet is not completed by Session #3, do it in a session. If they refuse, do not schedule any more appointments.
9. Check in all your patients as seen only after the duration in Practice Mate is accurate. Be sure the durations in Practice Mate are the same as your notes in case the chart is audited; if it's not, the insurances will ask us to refund the money owed.

Minimum face-to-face time for each session is as follows:

18 minutes for 30-minute sessions

38 minutes for 45-minute sessions

48 minutes for 60-minute sessions.

10. For those that see children, copy a CPS Mandated Reporter Form into your pdfFiller account.