

PODCAST TRANSCRIPT

CPP Ep. 26 Life's Challenges: Creating an Emergency Plan for Your Private Practice

Camille McDaniel (00:09.496)

To everybody who is listening and has been listening for the last several episodes, welcome back. It's always wonderful to have the support and I'm glad that you are joining me on this journey. And for everybody who is new, first time listener, well, welcome. It's wonderful to have you and I hope you stick around for a few more episodes and...

and maybe even participate, whether you've joined the Facebook group or whether you actually comment below some of the videos to give your own opinions. And if you happen to be listening by Spotify or Apple, you can still make comments and I see them and I do respond. So it's wonderful to have you here. Today, we're going to jump into a topic that has crossed some of our paths before.

And if you're in this field long enough, it might cross your path at some point in time in the future. But that is how do we manage our private practices when the unexpected happens? Curveballs of life or maybe even major events that aren't so much a curveball, but they definitely are going to shake some things up, change the way we see our clients.

How do we handle that so that we can move forward in as much grace and professionalism and ethically as possible? So when I talk about these curve balls or these major life events, I'm talking about like illnesses that occur or pregnancy for some of us, things like that that can actually shift.

how we see our clients, if we see our clients, when we might see our clients again, if we're able to at all. That would include, when I say illness, maybe not even our own illness, although sometimes that is the case, but it might even be the illness of a loved one and we have to maybe pick up and go help take care of a family member or a dear friend or something like that. So.

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We're going to take a look at what we can do to plan ahead. And prayerfully, if you are listening to my voice right now, that means you're not incapacitated. That means you have the ability to put some pre-planning into place. Maybe you are actually going through an emergency right now.

But you are still listening and that means there might be, and I believe strongly that there is at least one thing or two that you can do in the midst of experiencing this life altering situation so that you can move forward and ideally not have some of the guilt or stress, worry that we may experience.

for our clients, for ourselves. We're gonna take a look at the scripture. There are many applicable scriptures, but you know, a couple that came up for, that I believe are good for this episode. And then what we can do if, again, we don't have time for pre-planning and we are finding ourselves in the midst of a situation just out of the blue.

So let's kind of jump in to, like I talked about, some feelings. And I want to just address that first, because when we have these life situations come up, sometimes we can automatically worry about how this is going to impact our clients. You know, we are in a unique field in that our field of mental health is very relational.

You know, and so yes, we are providing a service to our clients, but we genuinely care about our clients because we actually get to walk a journey with those clients. And so the things that happen to us sometimes do impact them in ways that it might not in other industries. So you can find yourself kind of feeling maybe pressure to find a way to keep going.

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keep pushing even during these hard times. You can find yourself feeling responsible for your client's overall mental health and wellness if your life has those curve balls that we were talking about. And we want to just be able to recognize that this is totally normal. If you are feeling like, you know, this pressure, feeling like you're the one that's kind of

holding them together or going to break them down, that is normal. But remember, we are thankfully not the only ones in their world that has the ability to impact their world. And I really mean this even for clients who really don't have any other support system but you. Because thankfully, the Lord can make ways for our clients

that far exceed our ability to care for them. And we want to remember that we are standing in the gap for them, but we are not the creator. And thank goodness, because that means that there is still an ability for them to recover from things that they may experience with us in the session when we have unexpected or expected

life events that are going to shape and change significantly our ability to see our clients. It's okay to take a step back. We want to be able to remember that we are human and we're living human experiences just as they are. And sometimes we will have to take a step back. Let's remember a couple of biblical references as we move forward.

one of which comes from 2 Corinthians chapter 12. And so in this particular case, and I believe it, I like to start at the beginning, but I believe it may start at verse nine. The apostle Paul has a thorn in his side, not a literal thorn in his side, but you know, like there is something challenging him, bothering him. And he asked the Lord three times to remove it.

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And in this particular case or instance of challenge, it is not removed actually. It's not removed for his own good. It's to keep him humbled, it's to keep him in the way that he is trying to walk with God. So it's like a protection for him to lean on the Lord. And in that the Lord says, my grace is sufficient for you, for my strength is made perfect.

in your weakness. So Paul realizes that he will not maybe not experience a lot of relief from that thorn, but he learns to work with it. He learns to rejoice about it, knowing that it is for Christ's sake and that when he is weak, God is strong. There's another scripture also.

for things that happen that may not be there necessarily for our good or just things that happen that we may have planned for and desire, but things take a little turn and it is created an issue or a challenge that we had not expected. And that is coming from Psalm 46. And it says, God is our refuge and strength.

a very present help in the time of trouble. And so we want it in all these things because again, this is our livelihood. This is our business. You know, it is so easy for us to start freaking out

and wondering how are we going to make it through and how is this going to happen and what's going to happen with this person and what's going to happen with this system. And before you know it, we're like, we're kind of losing it there. Right. And it is because we have forgotten who gave us

the gift and the talent in the first place who allowed us to build the business and have the clientele in the first place. God is our ultimate referral source and we want to remember that he has the ability to be our refuge, be our help no matter what is going on in our lives. And we don't want to take our eyes off of that. Okay. So let's jump right on into what

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pre-planning looks like when we are trying to hopefully get ourselves prepared just in case life happens. Okay, so you want to create an emergency plan. If you don't already have one, this is very important. This is just really good for business owners in general. You need an emergency plan. What's going to happen should something happen?

with you, whether that's major illness, whether that's pregnancy, whether that again, like we were talking about earlier, whether that's somebody else that you happen to be the point person for, and you have to take a bit of a step back from your business to care for someone else. That could be a child, that could be a parent, that could be someone else, right? So just in case any of those things pop up,

Your emergency plan is going to include how to communicate with clients, how you're going to adjust your hours, what resources are available to help your clients and are available to cover you.

We're going to look at a backup. So backup care is going to possibly include if you are someone who has a group practice or you have staff, even if you are the only person in your practice, you have some supporting staff, then you're going to want to make sure that you have who's going to be the person that can possibly kind of help delegate. Who's going to?

reach out to your clients in case of an emergency. So these can be individuals that are in your practice. And if you have a practice and you do not have any staff, then you're going to want to build relationships with a trusted counselor, another mental health professional that can be, that's open to being your backup.

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This is somebody who would be notified in the event of an emergency and they will then have instructions on how to contact your clients. They may even have access to be able to see your schedule that particular week of the event so that they can notify individuals in your practice. Yes, you are going to want to make sure that you have some type of agreement written out, understanding of

privacy practices and policies and agreement to uphold those while acting on your behalf. And you're going to kind of have that tucked away somewhere, a copy for them, a copy for you, so that they then can have, you know, that you can have a contractual agreement with this individual as you are going to be giving them under, you know, emergency circumstances only, access to be able to contact your clients.

and maybe, you know, rearrange schedule or whatever it is that's required. Yeah. So this is going to help. The other thing that you may need to do is to have several clinicians as backups to see your clientele. So whoever the point person is, then that person may then give out a list of referrals. Other individuals that you've already secured

that can actually see your clients in case of an emergency. This happens to be a little bit easier when that life event is pregnancy, because ideally, you want to be able to already, once you know you're pregnant, maybe like a month or so in, you want to make sure that you have a list of other clinicians that your clients could see that specialize in

the challenges that your clients might have so they're a good fit for your clients. You may want to have a bit of a summary already typed up so that whoever might be meeting with those clients has an idea of where that client is working, what the treatment plan is for that client moving forward during your absence. You've ideally already talked to these mental health professionals and let them know.

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that you'd like to be able to use them. They've already confirmed that that's a go. So that's wonderful. And then for your actual client, sometimes people want to know, like, how soon do I actually let my clients know that I'll be going on maternity leave? Now, in my case, I had two children while I was in private practice. And both times I composed a letter for my clients. I gave that letter out about

three months in advance, so in my second trimester. And that was because I had like a combination of clients. You want to be able to give clients enough time to process the major change in session. So I had some clients with abandonment issues and it was perfect for them to not know too far in advance so that they're just ruminating on when I'm going to leave. Because for just for myself,

There were some clients who would have had concerns and at least one definitely did, concerns that I'm not coming back. And they needed to actually process, but what if you don't come back? What if something happens to you? They needed a little bit more processing time based on what it was that they were experiencing. And then there were some clients who were a little more along the lines of the wounded well, as in overall they were doing all right.

They were working through some life transitional things and they could actually go without seeing me and waiting until I came back. They now for me what I did offer after a period of time, I can't remember exactly how much time I think I took off. I may have taken off just two months for my first child and I took off I think like three or so months.

with my second child and I had certain emergency dates that I was available to check in with clients just so that if they were waiting for a longer period of time, I could just make sure that they were okay. There were definitely referrals that I gave to them. There were just some clients who just didn't want to switch to another therapist and they just wanted to wait for me to come back. And so I said, you know, in the event that as you're waiting, you realize, uh-oh,

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I probably should have actually taken on with another therapist, then I'm going to have these emergency dates. And for me, just based on when my, at least one of my children was born in my maternity leave, that kind of circled around a holiday. So I just made it available because some people struggle during that time of year a little bit more. So you can kind of look at, because some people are taking more than,

You know, they're taking more than three months, taking more than four months. Some people are taking a very long maternity leave. And so they may have some additional prepping and planning, and they may actually need to just altogether switch their clients over to new therapists. And then when they come back, they are going to be actually starting new. So you have a few things to consider when you're talking about pre-planning with regards to pregnancy. But I definitely believe that you should

put it all together in a letter for your clients. That letter should include information on available therapists that they can be referred to, what happens if there's an emergency, how you might be able to help them moving forward, or if you happen to be closing your practice after that, then all of that information. And I think if you're gonna be closing your practice, you probably want to prep them just a little bit sooner. Okay.

let's go ahead and look at the next thing that we wanna have on the list and of things that we're gonna do, and that's that point person. So if your point person is not another mental health professional, then we wanna look at, if my point person is going to be someone who's not in the mental health field, then we wanna have something that's HIPAA compliant. And so you may need to make sure that again, in that pre-planning, this individual,

takes a HIPAA compliant and PHI, privacy health information or private health information training. They have them actually online and some of them are offered for free. I was able to find a company that offers them for very large scale industries, but they offer their trainings online for free. And I will try to look that up and post that on the website.

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christinprivatepractice.com so that when you look at this episode or go for more resources, you might be able to see that there. And there might be places where you are aware of yourself that offer HIPAA and HIPAA compliant training and understanding. And you just want to make sure that that is something the person has taken and you want to sign that they have taken so that if they have to contact your

your clients or deal with any of your information, they know how to do that in ways that don't compromise anybody's private health information or PHI and that everything stays on the up and up. And so that person, just like the mental health professional, if that was your point person, this person is going to handle the phone calls. They're going to reschedule appointments. They may even forward clients to other referral sources, you know.

they're going to basically help your practice kind of narrow down while you're experiencing this curve ball.

You want to, if you happen to already use virtual or telehealth options, then wonderful, perfect. But in the event that maybe you are mostly face-to-face, then you want to look at the idea of just having knowledge of virtual options so that if you, again, have something come up and maybe you are not able to meet in person, but you could meet virtually.

then you want to be able to give your clients that option. So you want to know what's available, whether that's Zoom and then what does Zoom have as far as HIPAA compliant platforms and agreements, or whether you use DoxyMe or maybe you have through your electronic health record, EHR, maybe you actually have an option through them, but you want to just be made aware of what else could I use if I can't see my clients face to face.

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And that goes also for your scheduling. Again, there are a lot of, think at this point in time, the majority of us do online scheduling, but in the event that you don't, you just wanna make sure again that you are aware of online scheduling systems so that you can be prepared and have a smooth transition over for your clients if you're going to be seeing them virtually. Now let's talk about...

Here's what we can kind of look at if it comes out of the blue. What if we can't pre-plan? What if you don't even have any staff who can assist? You're it. Then what are we gonna do? I mean,

it does become a little bit more challenging, but there are still some steps that you can take to just manage this effectively. And the first thing I am going to say is you are going to go back.

to fully leaning on the Lord. Because sometimes when these things come up, depending on what the unexpected thing is, you may not be able to do anything but just take care of yourself. You may not be able to initially make a phone call. You may not be able to reschedule. You are possibly going to be worried that this is going to maybe, you know, be of detriment to your clients or tarnish your business name or

You know, all things are running through. You're going to have to take a deep breath. You're going to pray the Lord sees your situation. He knows your heart. So you're going to have to just stop for a minute and focus on being able to get through the emergency. Obviously you have to in this situation, your overall health and wellness has to come first because if you don't have your health and wellness, then you won't be able to help anybody else.

So again, if you don't have any staff, if you don't have anybody to help and you're it, then you're going to just first, an emergency pops up, first you're gonna focus on your own wellbeing, okay? Because as many people have heard, you can't pour from an empty cup, all right? And so you have to care about your health. The moment that you can, you're gonna communicate with clients. You're going to...

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identify someone who can assist, even if that happens to be, let's say it's extreme like you're in the hospital. If you happen to have a hospital social worker available who can kind of talk to you and you say like, know, how can I do, I have a business, I have these clients, like what are my options? Is there any way that I can, you know, get to a laptop or is there any way that I can, you know, get to a way that I can log in or.

something along that lines and see if there's any availability for them to help you so that you can reach out to your clients. If that is not an option, you want to see if the person can maybe even, can you get into my website? Like, can you give them instructions at least to get into your website? Is there anyone available to help you put even a notice on your website that there has been a major emergency and that as soon as the emergency allows,

you will be contacted by your therapist. Can somebody do that at minimum, right? Okay, so as soon as you're able to, you'll reach out or you will reach out to a point person to put a notification on your website. Hopefully you have a website that you can make those changes to because that would be the next thing, the next best thing if you're not able to reach out to them because oftentimes people will go to your website.

And then you have a referral system. If you do have staff, then if you can just get in contact with one of those staff members, then you can give instruction on being able to reach out to all the clients and have them go about doing what is needed to reschedule or to cancel, to refer out to other clinicians, okay? If you do not have, if you do not have any staff, then it's going to be about

going back to do you have relationship with any other therapists? Is there anyone that you could call? You may not have their telephone number in your phone, but could you look them up at this point in time? You know, we at least have we we have our smartphones and so we can go online and we can look up people's telephone numbers. We can send them a message through their website or we can email them directly.

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and see if they are available to assist you in this emergency and let them know what you're needing or let them know how you can be or they can be of some assistance. So see if that's a possibility, okay? We already talked about, like, know, and I'm just gonna bring it back around, because we already talked about in pre-preparation, we already talked about having some telehealth options. All right, well.

as soon as you are available, if you can meet or depending on what's going on, if you can meet with people via telehealth and you can do that but you just can't show up to your office, then you can always contact if you have the ability, you can contact them and you can schedule them to show up on telehealth instead of coming to the office. Now I do understand that that might not be

doable option for all clientele. But even if it is just having a transition session, whether these are young clients or whether they're older clients, you wanna be able to get to them to let them know what might be going on. You can talk by phone, even if you can't jump on like Zoom. So you have some options and I want to like,

Before we close for this particular podcast, I want to also address the question that people have about how much do I share? What do I exactly tell them has happened? You can always be still very, very human, very personable with your clients without oversharing, without telling too, too much, because then you don't want to flip the power differential and have them all of a sudden

you know, worried about you and taking on some of what you're going through, but you can let them know, I've had a medical emergency that's preventing me from being able to show up to the office. Or if someone's going to call on your behalf, you can say, you know, so-and-so had a medical emergency that is preventing them from being able to hold their sessions for the rest of the week. We are so sorry for the change and challenge that this may cause for you.

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but we are going to have to put your sessions on hold with this individual for right now until we get updates on their overall health. Here are some referrals, you know, or if you don't have specific referrals because this just happened out of the blue, then you can give them the name of directories where they can then start the search for another therapist. And you can have the person

touch base with them one more time to make sure that the client doesn't fall through the cracks and just ensure that they actually have been able to secure another therapist if that's what the situation calls for. So that's a lot in this episode to consider. I want for you all as like homework, if you have not already done this, I want you to come up with a plan.

I want you to write that down. want you to include whoever needs to be included in this plan. And that way you have it. I want you to then put it in a secure place, notify at least one or two people to let them know where this can be found. If you can put it on a system electronically so it's easily accessed, but also like protected and locked away, then do that.

whether you use Google Doc and you lock it except for a couple of people who have access, whether you actually put it on a form in your EHR, whatever you need to do, whether you put it in a filing cabinet, but you want to just notify people of what the emergency plan is and let them know where they can find it should something come up. Okay. And that's a plan that if you happen to have more than one person in your practice, that plan can be used for multiple people. It's like the protocol that you'll use. All right. So we have,

We have our assignment, we're gonna jump into it. It's gonna give us a lot to think about, but in the end, it will allow us to get through life and allow our clients to do so as well as we are business owners. Okay, until next time, God bless.