

# *Stepping Stones to Well Being, LLC*

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## **Philosophy**

Stepping Stones to Well Being, LLC was created to provide treatment services to those person(s) who desire support and intervention related to the challenges and stresses that life can bring. The philosophy is that support and intervention is based on is related to the stage of change model; treatment is based upon the client's motivational stage. The most important aspect of treatment is that treatment is voluntary.

This also extends to the realization that the provider and the client are aware that the use of medication is a tool for support and will not take the place of doing work outside of medication management appointments. This means individual therapy and using non- pharmacological interventions discussed in appointments are an important part of symptom management.

## **Client Commitment**

Client commits to:

1. Attend scheduled appointments on time;
2. Give a 24-hour notice, if an appointment has to be missed;
3. Participate in his/her treatment planning;
4. Engage in treatment work outside of appointments
5. Parents of minors agree to attend and participate in appointments by being physically present for in-office appointments or logging in for telehealth appointments

## **Reasons for Discharge/Termination from Treatment**

1. Successful completion of treatment. A mutual decision between the client and therapist is reached services are no longer needed.
2. Voluntary termination from the program. Either a transfer or discontinuance of treatment. In this situation, the client reaches this decision.
3. Discharge from the program due to treatment non-compliance.
4. Inappropriate/threatening behavior (i.e. coming to appointments under the influence of a substance).
5. Concern that treatment is not indicated or appropriate.

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## **Patient's Bill of Rights**

You have the right to:

- 1) Be provided with a good faith estimate of fees for those without insurance.
- 2) Be treated with dignity and respect.
- 3) Ask questions and engage in discussion about treatment options.
- 4) Sign Releases of Information for coordination of care and terminate releases at any time.
- 5) Participate fully in all decisions about treatment or services.
- 6) Refuse treatment or service or terminate services at any time.
- 7) Be informed about the rules that will result in discharge from services if violated.
- 8) Have your family and other providers involved in your treatment.
- 9) If you are an adult refuse family participation in your treatment, if you choose (this issometimes unavoidable for those under the age of 18).
- 10)Not be subjected to verbal, physical, sexual, emotional or financial abuse; harsh or unfairtreatment.
- 11)Not be discriminated against on the basis of race, age, sex, religion, national origin,sexual orientation, disability, or marital status.

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## **Medical Monitoring**

The connection between medical and physical health cannot be understated or underestimated. Often the impact of what is happening to a person physically may have an underlying medical issue.

It is important to note the following with regard to medication management services:

- 1) If you have had recent blood work (i.e. within the 6-months) please ensure that it is forwarded to the office.
- 2) If you have not had blood work **within the past year**, it will be necessary for you to have labs done BEFORE medication can be prescribed. This can be discussed at your intake appointment, but please be aware that a delay in getting labs done can result in a delay in starting medication.
- 3) Pending the type of medication, you may require blood work that is outside of what your primary care may complete
  - a. The office can supply a letter outlining the labs needed to be monitored for your primary to add them to your yearly labs
  - b. Orders can be sent to any Quest Labs for you to complete them on your time
- 4) On a case-by-case basis, there may be situations where there is a need for an EKG (i.e. if you are taking a medication that can affect heart rate/rhythms and there are potential complications or if there is a history of cardiac issues). These can be done in conjunction with your PCP or through an order to Quest Labs.

## **Coordination of Care**

Individuals are requested to sign releases of information for their Primary Care Provider and therapist. Releases of information are provided in the intake packet and can be provided at any time. The form is able to be used for ONE provider at a time.

Releases are able to be revoked at any time, but in doing so this can result in discussion of if treatment is appropriate.

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## **Attendance Policy & Fees for Missed Appointments**

1. Appointments for new medication management clients are scheduled for a minimum of 60 minutes. In the event that the intake cannot be completed a follow-up appointment will be scheduled.
2. Return appointments for medication checks are scheduled for either 30 or 45 minutes, depending on a number of different factors (i.e. the type of medication prescribed, needs of the individual, etc.).
3. Appointment reminders for return/follow-up appointments are sent via email a week before and the day before appointments. They can only be sent to one email address and cannot be sent to those under the age of 18.
4. If you need to cancel an appointment, please do so 24 hours in advance to allow for others to take advantage of the opening. If an appointment is canceled with less than 24 hours' notice, a missed appointment fee of \$80 will be due before another appointment can be scheduled.
5. Multiple missed appointments can result in discontinuation of services.
6. If you arrive more than 10 minutes late for your appointment, your appointment will be cancelled, and a missed appointment fee will apply.
7. Please note that missed appointments another will not be available for weeks.
8. Missed appointment fees **MUST** be paid before a new appointment can be scheduled.
9. It is feasible for individuals to log in from different locations for return appointments. The individual receiving the confirmation email can send the link to others who need to log on.
10. If a controlled substance medication is being prescribed, individuals are required to be seen in the office at a **MINIMUM** of once a year.
11. The use of telehealth vs. face-face appointments can be discussed on a case-by-case basis, but are also at the clinical discretion of the prescriber.

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## Telepsychiatry Appointments

There are very clear guidelines under which Telepsych appointments can be performed. Platforms like Facetime or Skype are NOT compliant with these guidelines.

At the current time Stepping Stones to Well Being, LLC is utilizing Zoom for Telehealth appointments.

### **All Telepsychiatry appointments must:**

- 1) In order to take place, clients **MUST BE IN THE STATE OF NH AT THE TIME OF THE APPOINTMENT.**
  - Clients outside the state of NH cannot be seen via telehealth and this can result in the appointment being canceled with a missed appointment fee being applied.
- 2) By logging in for the appointment you are providing consent for the appointment to take place via telehealth.
- 3) In each progress note, the location of the client(s) will be noted.
- 4) For those under the age of 18, a parent or guardian **MUST** be present for an appointment.
  - Logging in from separate location is allowed.
- 5) Telehealth appointments are scheduled for the same length of time as in-office appointments.
- 6) All telehealth appointments **MUST** have working video in order to take place; if there is no working video, the appointment will be canceled.
- 7) Those participating in telehealth appointments must be in a private space (i.e. your car, office at work, home, or for those under the age of 18 a location at the school that is private) in order to participate.
- 8) If individuals are not in a private location the appointment will be terminated.
- 9) Individuals **ARE NOT** permitted to be driving at the time of appointments; if you need to be in your car for any reason, you must be pulled over in a safe location.
- 10) Telehealth appointments have the same policy with regard to missed appointment fees\*  
*\*Issues with technology will be dealt with on a case-by-case basis\**

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## **Financial Responsibility Policy**

- 1) I understand that Jennifer M. Shuart/Stepping Stones to Well Being, LLC does not balance bill for fees.
- 2) I understand that it is my responsibility to provide Stepping Stones to Well-Being, LLC with accurate and up-to-date information related to any changes in my insurance coverage as soon as it is known to me or at the time of my next visit.
  - a. This includes the presence of any secondary insurance.
- 3) I understand that any co-pays/deductible payments for visits are due at the time of the appointment.
- 4) I understand that if an appointment is missed or not canceled within 24 hours, a missed appointment fee of \$80.00 will be charged.
- 5) I understand the missed appointment fee of \$80.00 must be paid before a new appointment can be scheduled.
- 6) Co-payments and appointment fees can be paid through Credit/Debit, Health Care Savings account, Check, or Cash.
- 7) I authorize my insurance plan to pay benefits directly to Stepping Stones to Well-Being, LLC.
- 8) I authorize Stepping Stones to Well-Being, LLC to release pertinent information related to my treatment to my insurance company when requested, or to facilitate payment of benefits.

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## **Schedule II and IV Prescription Medications**

Prescription drug monitoring programs (PDMPs) are state-based electronic databases that contain information on controlled substance prescriptions dispensed by pharmacies and prescribers. These programs can help reduce the misuse and “diversion”—the redirection of drugs from legal, medically authorized uses to illegal uses—of controlled substances, including prescription opioids. PDMPs allow prescribers and pharmacists, as well as other individuals and entities (such as researchers, health insurers, and medical licensing boards) that are authorized to access the data, to monitor controlled substance use by patients, the prescribing practices of medical practitioners, and population-level drug use trends (US DOJ, DEA, Diversion Control Division).

In order to prescribe any controlled medication, it is a **requirement** as a Psychiatric Nurse Practitioner that the a log-in for the PDMP is created and that the PDMP is monitored regularly. The PDMP provides information for up to 3 years. In some cases, data from surrounding states is also readily available, while for others it can be requested.

While there may be a number of prescription medications that are monitored, the use of Schedule II and IV medications is the majority of what is used in medication evaluation and management services. Schedule II and IV medications can include, but are not limited to: Adderall, Concerta, Ritalin, Ativan, Xanax, Valium, and in some cases Gabapentin. A more comprehensive list can be found here: <https://www.deadiversion.usdoj.gov/schedules/>

Please understand that prescriptions for stimulants are **NOT** permitted to be called into the pharmacy (i.e. left on a voice mail), are **NOT** permitted to be sent with refills, can **ONLY** be picked up at a pharmacy on a monthly basis, **and are also not able to sent out of state.**

The prescribing of these medications is solely at the discretion of the provider. This **DOES NOT** mean that individuals taking these medications at the time of intake can expect that they will be continued indefinitely or at a particular dosage. In particular, medications like Ativan, Xanax, Valium, Klonopin, Ambien, Lunesta etc. are not safe and appropriate for long term use. If appropriate/necessary, treatment plans to taper from medications safely and appropriately will be discussed and created on a case-by-case basis.

**Please note that in order to have a controlled medication prescribed, individuals are REQUIRED to be seen in the office at least once a year. This is an insurance requirement and there are NO EXCEPTIONS. This may be increased per the discretion of the prescriber.**

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## **Prescription Medications**

Prescriptions will be sent electronically and directly to the pharmacy that you indicate. Please note that the provider CANNOT send medications out of state due to licensing etc. requirements. This includes for going on vacation, individuals being out of state for colleges or work trips. Please plan accordingly.

When appropriate and available through managed care pharmacy benefits a 90-day prescription is provided. There are times that the prescriber will deem that it is NOT appropriate to have a 90-day supply of medication sent to the pharmacy and the provider reserves the right to send electronic prescriptions to the pharmacy using the safest and most clinically appropriate format. For example, this can include sending medications weekly or for two weeks at a time.

In some cases, medications for those under the age of 18 will be required to be held and administered by parents.

## **Prior Authorizations**

There are times when an insurance company/prescription plan requires a Prior Authorization for a medication. This can be for initiation or even continuing a medication. Prior Authorizations can also be required when changing from one medication to another; even if the medications treat the same diagnoses. At times these can be denied. This process can take anywhere from a few hours to a few days or weeks.

## **Refill Prescriptions**

When possible, electronic refills will be sent during your appointment, unless it is a new medication that you are starting. **THERE ARE NO RESPONSES TO ELECTRONIC PRESCRIPTION REQUESTS FROM PHARMACIES.** If you require medication refills you must let the provider know. It is also important to check with the pharmacy and ensure that there are no “previous” prescriptions that can be refilled. If you know that you are running low on medication, please do not wait until the last minute to request a refill as it will result in a delay in your ability to obtain the medication.

Please also note that there may be times when a refill is not able to be sent (i.e. if there have been missed appointments or you haven't been seen for a follow-up appointment) until coming in for a scheduled appointment.

**Refills for those who are 18 years old and under are required to have a height and weight with the prescription. Providing this information at the time of the request will reduce delay in refill times.**

## **Medication Changes**

**Medication changes will NOT take place outside of appointment times (i.e. through email).**

Updated: 7/1/22



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## **Treatment Planning and Compliance**

The use of medication as a tool for management of symptoms is a personal choice, and one that is not easily made.

Medications are helpful as symptoms of mental health impact daily life. While medications discussed with providers and there is an agreed upon treatment plan, it is understandable that treatment plans may need to be adjusted in accordance with symptoms. In some circumstances, these adjustments can be made in emergency situations; but overall, the changes will be made at scheduled appointments.

Every effort is made by the prescriber to provide information related to the risks and benefits of treatment plans and additional information regarding medications can be found through using reputable websites like Medscape or the medication manufacturer's website. Often, medications are used "off label," meaning for something other than what the FDA has approved them for. The use of medications off label is based on clinical appropriateness and medical necessity as well as review of appropriate scientific literature. Unfortunately, the potential to predict **all** side effects to medications that may be experienced is improbable and it is important that you are in communication with the prescriber if you are experiencing any change to your physical health.

The discontinuation or addition of medications (i.e. taking additional dosages of the same medication or discontinuation of medication without discussion with the prescriber), without discussion with the prescriber can result in serious consequences, both medically and psychologically. I understand that this can place undue harm to myself/my child.

By signing the consent to treatment page in the client packet, I am conveying my understanding that changing a medication regimen (i.e. adding or decreasing dosages) without talking with the prescriber can\* result in my termination from services. This includes using medication inappropriately through excess use.

\*Conversations and determinations will be on a case-by-case basis

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## **Therapeutic Intervention, Availability & Scheduling**

Stepping Stones to Well Being, LLC has been working with area Masters in Nursing programs to be an educational preceptor/placement site for students who are learning to prescribe medication. ***Please know that it is your decision as the client/parent/caregiver if you feel comfortable with a student being present for appointments. If you do not feel comfortable, this will in no way affect your care and treatment,*** but please let Jennifer know.

If there is something that comes up in the course of an appointment and you would prefer a student not to be present, please feel confident that you can share this without fear or worry that you are impacting your treatment. Students understand the delicate nature of mental health and are respectful of individual feelings and decisions.

Every effort will be made to participate in meetings schedule permitting. Additionally, letters outlining diagnosis, recommendations, concerns, etc. for school or other meetings can be done upon request. Please provide at least a week's notice if this is needed.

While the appointment times may be longer in length than some other providers, they are not meant to replace the role and support of individual and/or family therapy. At the current time there is not a requirement that individuals participate in individual or family therapy in order to engage in services through Stepping Stones to Well Being, LLC. However, there may be times where this is recommended or necessary in order to continue services. This will be discussed on a case-by-case basis.

There may be times when it is necessary to make a change in your treatment team. Stepping Stones to Well Being, LLC seeks to provide quality treatment that is also ethical and within the scope and bounds of the knowledge of providers. There may be times when a discussion of changing the treatment team to a provider who may have more knowledge/expertise is appropriate and necessary for your overall health.