

Getting ready to see a Mental Health Provider



Quick Reference Guide

Now that I've found the name of a professional that I like, what do I do?

What should I bring to this appointment?

I'm getting ready for the appointment. What should I ask?

- Questions to confirm with your insurance carrier
- Guiding questions to reflect on when choosing a professional
- Questions to ask BEFORE meeting with a professional
- Questions to ask DURING the initial visit/informational interview
- Questions to reflect on AFTER meeting the professional

 [Counseling and Psychological Services](#)

 [Health Promotion Appointment](#)

Now that I've found a provider, what do I do?

The directories and other resources you used should have their contact information listed. Using that information, reach out to their offices and request an initial appointment. This may also be called an initial consultation or intake evaluation. Make sure to say that you're a prospective, or new, patient!

As you start looking for and meeting with mental health professionals, know that you may not find a perfect - or even an ok - professional on your first try.



This process can take time, and you should take the time to experiment with different people to find a good fit.

What should I bring to this appointment?

You should bring:



Your medical insurance card



A method of payment for any out-of-pocket costs (such as a co-pay) you need to pay.

- Note that some offices only take credit or debit cards. Ask their office if you have questions!

Any relevant health history or medical records. This may include:



- Any current or older prescription medications
- A list of former treatments or procedures
- The results of clinical exams or laboratory tests performed by other health care providers.

I'm getting ready for the appointment. What should I ask the specialist?

Finding a mental health professional that meets your needs and supports you can be an extensive process. We've provided some questions to help guide this process. While this list is not exhaustive, these are some questions to get you started!

You might also consider looking at some web pages to find a provider, including [Mental Health America](#), [Mayo Clinic](#), the [National Alliance on Mental Illness](#), or find your own.

Questions to confirm with your insurance carrier



- > With my insurance, what do I need to pay to see the mental health professional (co-payments)? How many visits are covered by my insurance per year? Is there a deductible before my insurance kicks in?
- > Do I need a referral from my primary care provider (PCP) or the insurance company to see a therapist or mental health professional?

Guiding questions to reflect on when choosing a professional



- > Do I prefer someone that shares identities with me (race, gender, sexual orientation, languages, ethnicity, or cultural background)?
- > What do I want out of my treatment? What are my goals for therapy? Do I want to talk with someone, discuss potential medications, or potentially receive a diagnosis?
- > How often do I want to have a session? Bi-weekly? Monthly? As needed?
- > Do I prefer having in-person or remote sessions? What times work best for me? Weekends? Evenings?

Questions to ask BEFORE meeting with a professional



- > Do they accept my insurance? Are they accepting new patients?
- > How and when do they collect payment? Do they support flexible payment schedules? Sliding scale? Other forms of financial assistance or billing support?
- > Where are they located? Are they in a convenient location for me – along my commute, easy travel distance, etc.
- > Do they split their time between multiple locations? What are their daily hours? Do they provide telehealth services?

Questions to ask DURING the initial visit/informational interview



- > What is your approach to therapy? What models/styles do you use frequently?
- > How much experience do you have in treating & supporting patients with my concerns or conditions?
- > What is your approach to the patient-provider relationship?
- > What is the wait time to get in to see you?
- > How can we communicate outside of an in-person visit? Do they have a messaging or email system to check-in between visits?
- > How can I access or review my medical records in your system? Does this include notes on next-steps or to-dos before our next session?

Questions to reflect on AFTER meeting the professional



- > Did they answer my questions? Did they seem to listen and acknowledge what I was saying?
- > Did they discuss my goals and a potential timeline? Even in an initial visit, did it seem like we made progress with my goals or needs around seeking support?
- > How did I feel in their office space (or Zoom room)? Did I feel comfortable? Was the space easy for me to navigate?
- > Is their website or app easy to navigate? Can I easily find different information that I need?
- > How long did they spend with me? Did this feel like enough time to address my concerns?

