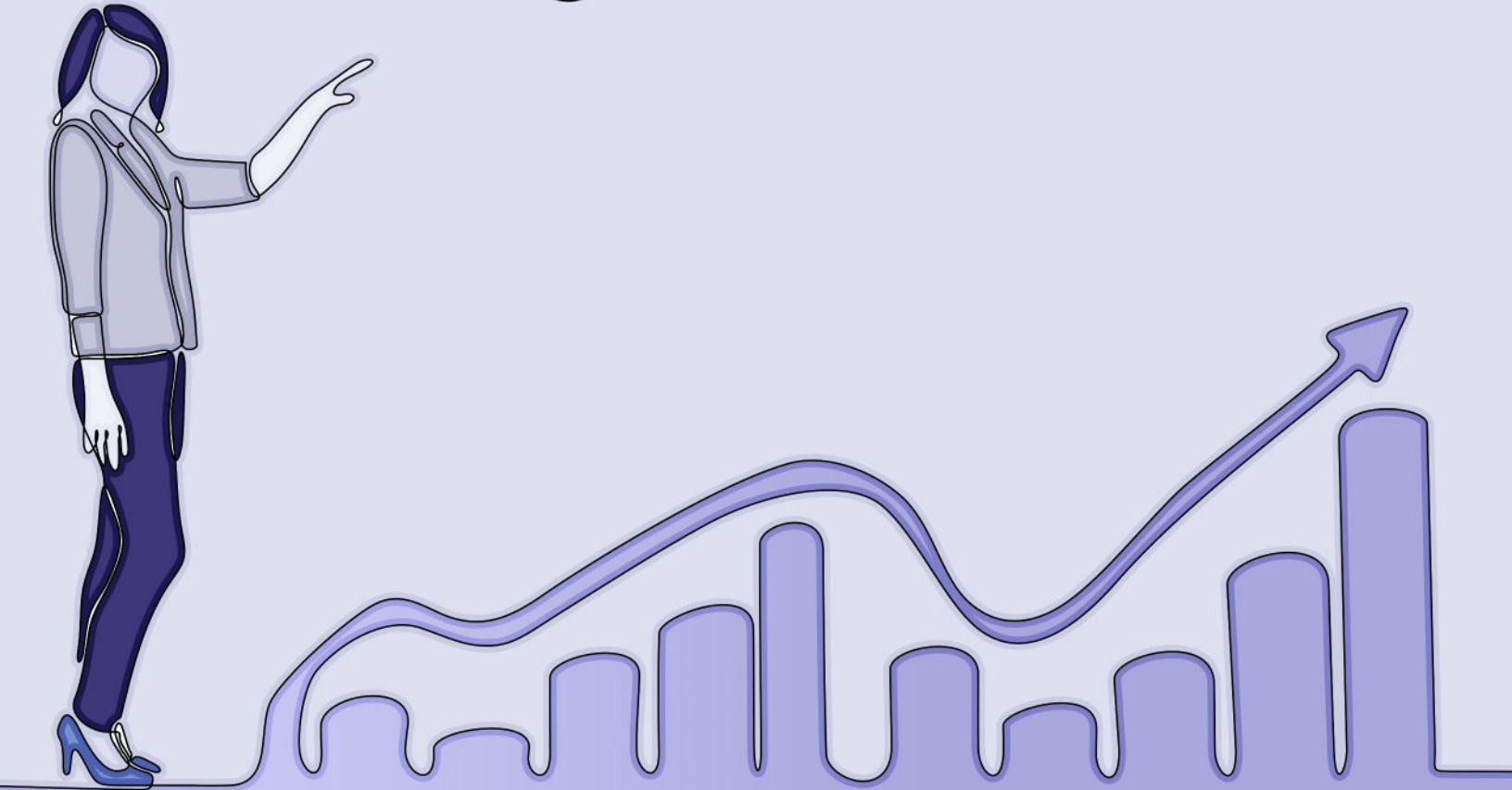




The Essential Discount & Sliding Scale Tracker

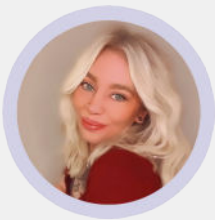


Understanding the financial diversity of your clientele is crucial for a thriving, inclusive practice. This tracker is more than just a spreadsheet; it's a reflection of your commitment to accessibility and empathy in mental health care.



In the spirit of making mental health care accessible to all, our Discount & Sliding Scale Tracker is designed to help therapists seamlessly manage financial assistance options for their clients. This comprehensive tool not only aids in the equitable distribution of services but also ensures your practice can sustain its supportive offerings. By integrating this tracker into your business, you'll have a clear overview of how discounts and sliding scales are applied, helping to balance client needs with your practice's financial health.

Understanding the financial diversity of your clientele is crucial for a thriving, inclusive practice. This tracker is more than just a spreadsheet; it's a reflection of your commitment to accessibility and empathy in mental health care. It provides a structured approach to evaluate and implement your sliding scale and discount policies, ensuring they are aligned with both your values and business model. With sections dedicated to policy outlines, income verification, and self-assessment tools for clients, this resource empowers you to make informed decisions that honor your professional boundaries and the diverse economic realities of those you serve.



Danielle Rose (Dani) Allen, MSW CTRC (She/Her)

Dani Allen is the Clinical Outreach and Development Manager for [Belongly](#). At [Belongly](#) she is responsible for engaging in outreach and marketing efforts to establish collaborative alliances with mental health practitioners who can gain value from the Belongly community while supporting clinical referrals for therapists and facilitating networking connections. She offers specialized knowledge on mental health subjects and the requirements of therapists and creates valuable downloadable content and resources for existing and prospective members of the [Belongly Community](#).

Policy Overview & Client Assessment

Sliding Scale Policy Summary

Fee Range

Define your sliding scale fee range (e.g., \$50-\$150 per session).

Min: _____

Max: _____

Criteria for Eligibility:

List the criteria clients must meet to be eligible for sliding scale fees. Consider income brackets, employment status, student status, etc.

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Sliding Scale Tiers

Outline your sliding scale tiers, detailing the fee for each tier and the corresponding eligibility criteria. This helps create a structured approach to applying your sliding scale fees.

[Pro Tip from Dani: I'm a big fan of worksheets for capturing common client inquiries. Try it out with your sliding scale tiers—it's a real time and talk-saver! Bonus if you rock a client portal (shoutout fellow Notion aficionados!), just add a doc submission feature for applications or proof of eligibility. Streamlining workflow means more time for the heart of our work. Give this small tweak a whirl—straight from my playbook to yours!]

Tier 1:

Tier Name: _____

Description:

Fee: \$_____

Eligibility Criteria: _____

Tier 2:

Tier Name: _____

Description:

Fee: \$_____

Eligibility Criteria: _____

Tier 3:

Tier Name: _____

Description:

Fee: \$_____

Eligibility Criteria: _____

Specify the types of discounts you offer (e.g., student, senior, hardship) and outline eligibility.

Discount Type: _____

Fee Reduction: _____

Eligibility Criteria: _____

Accepted Proof Documents: _____

Discount Duration:

☐

Permanent

☐

Temporary

Renewal/ Re-evaluation Details: _____

Discount Type: _____

Fee Reduction: _____

Eligibility Criteria: _____

Accepted Proof Documents: _____

Discount Duration:

☐

Permanent

☐

Temporary

Renewal/ Re-evaluation Details: _____

Discount Type: _____

Fee Reduction: _____

Eligibility Criteria: _____

Accepted Proof Documents: _____

Discount Duration:

☐

Permanent

☐

Temporary

Renewal/ Re-evaluation Details: _____

Discount Type: _____

Fee Reduction: _____

Eligibility Criteria: _____

Accepted Proof Documents: _____

Discount Duration:

☐

Permanent

☐

Temporary

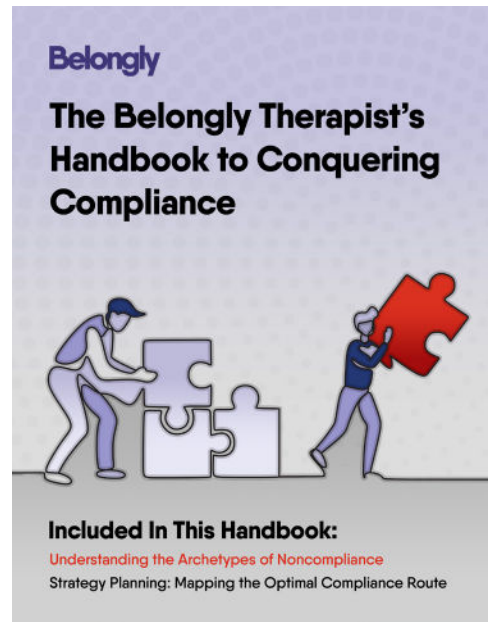
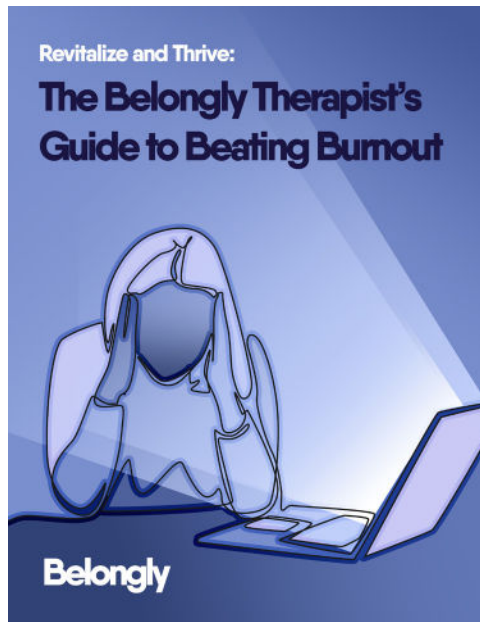
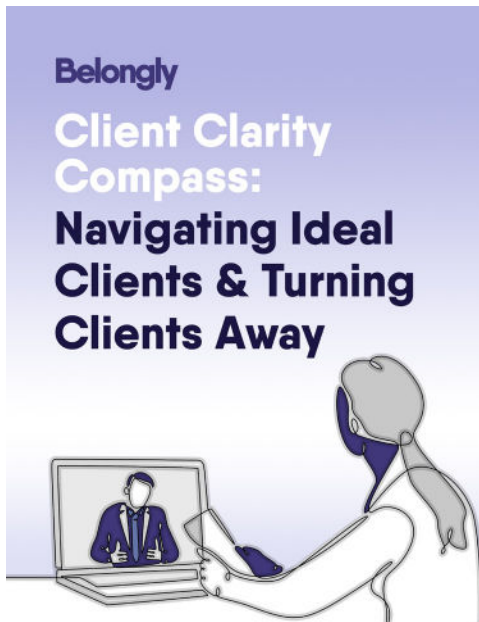
Renewal/ Re-evaluation Details: _____

Sliding Scale & Discount Log

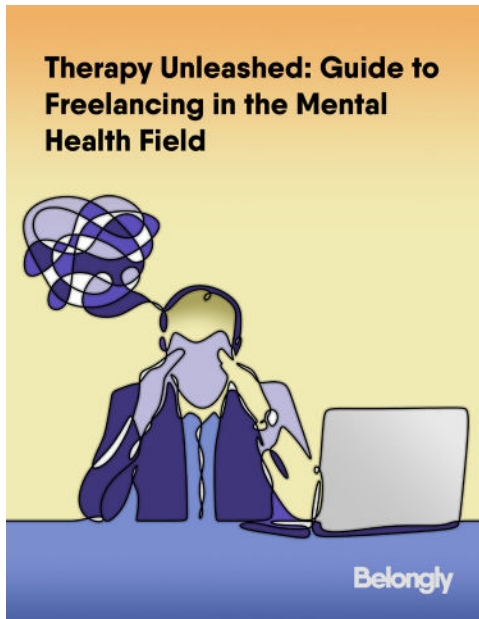
Client Name	Date	Session Type	Applied Discount	Session Fee	Notes

Policy Adjustment Notes

Record any decisions to update your sliding scale or discount policies. Include reasons for changes, how you anticipate they will impact your practice, and upcoming dates for review or evaluation.

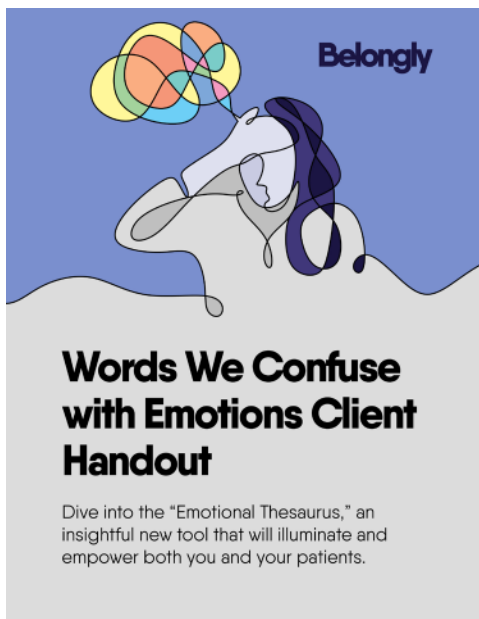


Included In This Handbook:
Understanding the Archetypes of Noncompliance
Strategy Planning: Mapping the Optimal Compliance Route



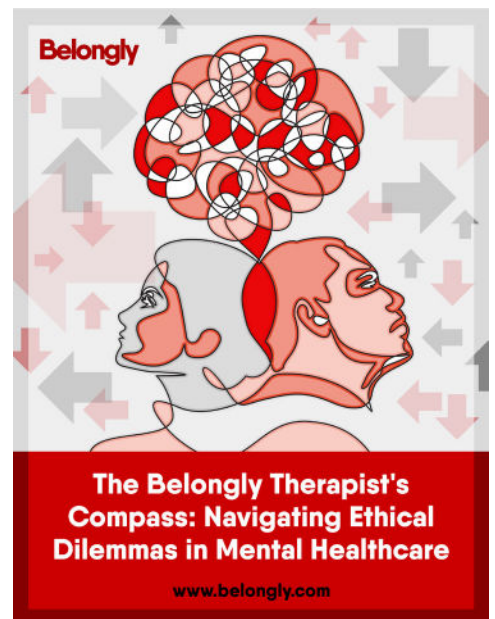
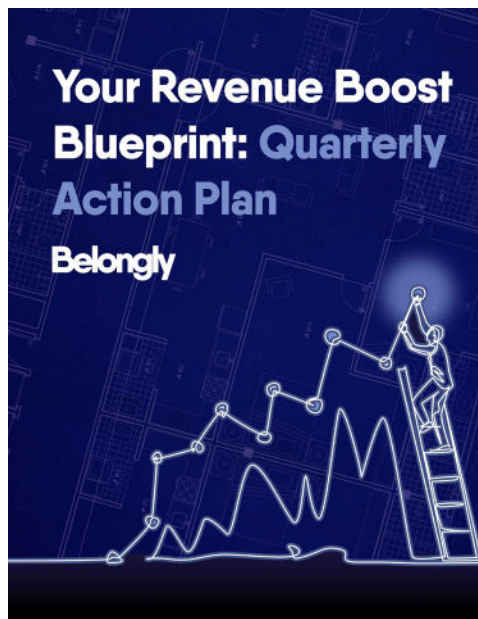
**HIPAA 2023
Policy Change**

belongly.com/hipaa2023



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with Emotions Client
Handout**

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