



✨ Gmail Genie is here to grant your 3 wishes! ✨

- 1) Tutorial to get your templates set up quickly
- 2) 11 therapist-written templates that cover various aspects of your business.
- 3) A fun Canva template for your email signature [CLICK HERE](#)

To edit, click file and make a copy.

Video Tutorial:



Click to play!



Template Library

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Client Reply- taking new clients

If a client sounds like a good fit, I like to let them know that they are in the right place and that I think I can help them with their concern. At this point in my practice (13 years in), I have pretty clear messaging about who I work best with and I am known in the community, so most of the people who reach out to me have already self-screened. For this reason, if I feel they are a good fit I send them straight to my online scheduling platform and meet with them for the initial assessment. You may have a different process like offering a phone consultation- just change the wording to reflect that.

Hi {NAME}

Thank you for reaching out! From what you have shared, it sounds like we could be a good fit to work together.

I offer {this type of therapy}, which is a {this type of approach}. I am experienced in working with {clients' concerns} and would be happy to talk to you further about working together.

The next step would be to {schedule a consultation call, go online to book an initial appointment, reply with availability, whatever your process is}

Please let me know if I can answer any questions for you and I look forward to meeting you soon.

Sign off,

Your Name



Client Reply- not taking new clients

For me, replying to emails just to tell people I can't help is stressful and draining. And it doesn't feel OK to just not reply. I created this clear and direct email template so I can quickly reply and get people the resources they need.

Hi {NAME}

Thank you for reaching out! Unfortunately, I am completely at capacity and unable to take any additional clients at this time.

I recommend the following practices. They work with many different concerns, take most insurances, and are usually able to get clients in quickly.

{List 3 trusted referrals and contact information}

I hope this helps!

Sign off,

Your Name



Networking Reply- taking new clients

Use this when another professional reaches out about your availability and you are taking new clients. I always have the client contact me directly to set up the initial appointment. Later, if you take the client on, you can send your release and reach back out to the provider to coordinate care.

Hi {NAME},

Thank you so much for reaching out! I am currently accepting new clients and have availability on {these dates or times}. From what you have shared, it sounds like {I or my colleagues} could be a good fit for this client.

Please have the client contact me at {phone, email, etc} to start the process. {Share a little about your intake process}

Thank you for the referral and I look forward to hearing from this client,

Sign off,

Your Name



Networking Reply- not taking new clients

Use this when another professional reaches out about your availability and you are not taking new clients.

Hi {NAME},

Thank you so much for reaching out! I do not currently have openings for new clients for therapy. I am currently offering {List any other services you may offer like CEUs, consulting, supervision, groups, etc}. Please reach out if you would like to find out more about those services and you can check my website out here: {WEBSITE}.

Please tell me more about your clinical focus areas and insurances accepted so I can send any potential referrals your way.

Wishing you the very best in your practice!

Sign off,

Your Name



Former client reaches out and availability is limited

I included this one because this is always hard for me- when a former client reaches out and I don't have as much availability as I used to. You could also adapt it to say you don't have availability at all, and include referrals, or offer a waitlist.

Hi {NAME},

It's so nice to hear from you!

Since we last met, I've been making a few changes to my practice, including my schedule. While I always prioritize and try to keep my door open for returning clients, unfortunately, my availability is limited. My available appointments are {LIST DAYS OR TIMES}.

{Take a look at my schedule/ email me back/ whatever your process is } and feel free to book if you see something that works for you. {or I currently have a waitlist and expect to have openings in XX AMOUNT OF TIME. Join the waitlist HERE}

If you need to work with someone with more availability, I understand. I have trusted colleagues with openings who are wonderful therapists. They work with many different concerns, take most insurances, and are usually able to get clients in quickly.

{List 3 trusted referral sources here with contact information}

Thank you so much for reaching out, and let me know what you decide,

Sign off,

Your Name



Confirmation of Appointment

I use this often for clients who need an “excuse” for work or school. I only confirm that they had an appointment and nothing else, and I send it directly to the client.

To whom it may concern,

This email serves as confirmation that I met with {Client Name} for an appointment on {DATE}.

Sincerely,

Your name and credentials.



Consultation Follow-Up

I provide EMDR Consultation (but this would work for any consultation!) , and it is always helpful to send a follow-up email. Not only does it provide the consultee with verification of attendance, but it also gives you a chance to share any resources and provide information for future scheduling.

Dear {NAME},

This email confirms that **xx** received **1 hour** of {type of} consultation on **date**.

You'll receive a separate invoice from {payment processor} if you still need to pay for your session.

Additional resources discussed in the session: {Provide links}

[{Provide case consultation form or any other forms you use}](#)

Link to schedule:

{Scheduling link here}

Additional Information

{Provide any additional information that your consultees may need to know about the process, etc}

Thank you!

Your Name



Always-on Auto-Response

I keep this on all of the time, and when I am out of the office I just add the out of office information at the top. When the sender's email is answered in the auto-reply, I consider it answered. This saves me a ton of time in my inbox.

Hi {NAME}

Thank you for reaching out! Please read the following information carefully, as many of your questions may be answered in this reply.

NEW CLIENTS:

{Share here whether you are accepting new clients, and the process to schedule if so}.

RETURNING/ FORMER CLIENTS

Appointments are dependent on availability. I will contact you as soon as possible to discuss scheduling or referrals if needed. {Customize for your own availability}

FOR {YOUR SPECIALTY AREA}

If you are looking for immediate help with {your specialty area} please contact {resource and contact information}

FOR GENERAL MENTAL HEALTH {if providing referrals}}

I recommend the following practices. They work with many different concerns, take most insurances and are usually able to get clients in quickly. {List 3 trusted referrals with contact information}

CURRENT CLIENTS

Current clients may schedule here {provide online scheduling link or another process for scheduling}

OTHER SERVICES {if you offer consultation, supervision, etc}

If you are a professional looking to schedule {service}, information and links to schedule consultation or groups can be found here: {website link}

If you have a concern that has not been addressed, I will respond to all other messages during regular business hours on {regular business days, or date of return}

Sign off,

Your Name



Out-of-Office Reply

If you only want to put your auto-responder on when you are out, here is a simple template you can use.

Hi {NAME}

I am currently out of the office and will be away from phone and emails. I will reply to all messages when I return on {DATE}

MENTAL HEALTH CRISIS:

If this is a mental health emergency, please call 988 or go to the nearest emergency room.

If you need to speak to a therapist while I am away, please contact my colleague xxx who will be providing coverage while I am away. They can be reached at {phone, email}. (I use this when I am out of the country or unreachable)

NEW CLIENTS:

I am/ am not accepting new clients, here are the next steps to schedule. {or provide referrals}.

RETURNING/ FORMER CLIENTS

If you would like to schedule an appointment, you can do some online here {include scheduling link or further instructions}.

I will respond to all other messages during regular business hours on {date of return}.

Thank you again for reaching out and I hope you have a wonderful day,

Sign off,

Your Name



Requesting Consultation

Use this when you want to reach out to another professional to ask for consultation or networking. I always recommend offering to treat another professional to lunch or coffee if they are taking their time to meet with you and it is not paid consultation.

Dear {NAME},

I have been following your work in {niche}, and I have noticed that we share a similar passion for serving {populations/technique, etc}. Do you offer consultation? If so, I would love to work with you to learn more about how to best serve my clients. Please let me know your rates and availability, as well as the best way to schedule.

Sign off,
Your Name

Conversely, if you are requesting a meeting for professional networking, you could replace the consultation part with "I would love to treat you to {lunch/coffee, etc.} to talk about how we might be able to collaborate."



Requesting Care Coordination with Provider

I send this to the provider when my client is receiving care or medication. This is not only good practice (and required by some insurance companies), it's also great sneaky marketing. It lets you build a relationship with the provider and have them experience your work and professionalism firsthand. You'll need a signed release of information from your client.

Dear {NAME},

My name is {name} and I am a {title}. I am reaching out to coordinate care for our mutual client. Attached is a release of information. What is the best way to send you a treatment summary? I will get that over to you right away, and I would love to set up a time to chat briefly about care. I know your time is valuable and I really appreciate the work you are doing. Looking forward to talking with you soon,

Sign off,
YOUR NAME



No Longer Taking Client's Insurance

This one is always tough for me- when I am working with a client, and due to terminating an insurance contract or a change in their insurance, I am now out of network and need to notify them. I will usually offer 6 months at a discounted rate, but this is completely up to you. Assuming that they aren't ready to complete therapy, you and your client have 3 options: 1) They can pay your full self-pay rate, 2) You can negotiate a discounted rate for a limited period of time or 3) You can refer them out to a trusted colleague.

Dear {NAME},

I wanted to let you know that I will no longer be in-network with {insurance plan} starting on {date}.

Prior to that date, we can discuss your goals and if needed, I can provide you with referrals for in-network providers. If you prefer to continue working with me, I am offering a discount rate of {\$XX} per session for 6 months. After that time my full rate is {\$XX}.

I apologize for any inconvenience this has caused! If you would like to schedule some appointments while I am still in-network, here is the link to my calendar {link or other instructions for booking}.

Sign off,
YOUR NAME



Referring Out Due to Missed Appointments.

This is another tough one. It's so important for us to hold these boundaries for our businesses and our own self-care, but it can be hard when clients take it personally. Remember, it is NOT personal, at all, it's business. And if they are not making it to their appointments it is likely not serving them to keep them on your schedule. You'll want to have this outlined in your policies, and please check with your licensing board's guidelines about referrals and client abandonment. In my state, I am required to provide 3 referrals when referring out and I do my best to facilitate a warm hand-off.

Dear {NAME},

I hope everything is ok. I wanted to follow up with you regarding your therapy sessions. I try to be very flexible and accommodating about missed appointments and I know that things come up, however, today was the # {whatever your policy is} missed appointment without prior notice or rescheduling.

I genuinely care about your well-being, and I believe that referring you to another therapist who can provide the attention and consistency you deserve is in your best interest. I think that a therapist who has availability that works with your schedule could be a better fit for you. I recommend getting scheduled with a new therapist as soon as possible to avoid any disruptions in your progress.

Here are 3 I recommend that take many insurances and usually have openings.

1. {Referral #1}
2. {Referral #2}
3. {Referral #3}

Please understand that this decision is motivated solely by my commitment to your progress. I genuinely hope that you find the support and guidance you need. I am here to support you during this transition and ensure a smooth handover to another therapist.

Wishing you all the best on your continued healing journey,

Sign off,

YOUR NAME



A Change in Your Therapy Schedule

I change my schedule fairly regularly due to the changing needs of my family and my own self-care, so I keep this pretty matter-of-fact and try to give 1 month's notice. I find that most clients are able to make it work and if not, we can discuss referrals.

Dear {NAME},

I wanted to give you a heads-up about an upcoming schedule change. Starting on {DATE}, I'm going to be changing my schedule. {You can put something here about the reason for the change if you want to, but it's by no means necessary}. At that time, I will be available {days of the week} from {hours}.

I am hoping we can work something out to make this work for you. If needed, I am happy to provide a letter for you to take to {school, work, etc} to confirm our appointment. I apologize for any inconvenience this may cause.

Sign off,

YOUR NAME



NOTES:

Use this space to jot down any notes or brainstorm additional templates you'd like to create.