

For referring clinicians

Preparing your patient for psychiatry

A first psychiatric visit that goes well is largely set up by the referring clinician. Here's what to say, what to send, and what to skip. Ninety seconds of prep in the exam room saves ninety minutes downstream and helps your patient show up trusting the process.

Say this to your patient (in the room)

- "I'm referring you to a psychiatrist. That's a physician who specializes in mental health, including medication."
- "The first visit is a full evaluation, about 45 to 60 minutes. Longer than a typical PCP visit because they need to hear your whole story."
- "They may adjust or change your medication. I'll stay in the loop and manage anything they don't."
- "You can bring anyone you want. Some people bring a spouse or family member. You don't have to."
- "There's a short worksheet [give them the Medication History Worksheet]. Filling it out ahead of time makes the visit go faster."

In your referral note, include

- Working diagnosis or presenting concern, in one sentence.
- PHQ-9, GAD-7, or other validated screener scores if you have them, with dates.
- Current psychiatric medications, doses, prescriber, and how long the patient has been on them.
- Prior psychiatric medications (or the Antidepressant Trial History Form filled out).
- Relevant medical history: thyroid, seizure, cardiac, sleep apnea, substance use, pregnancy status.
- Safety history: current SI/HI, prior attempts, prior hospitalizations. Even if just "no known history," say so.
- What you're specifically asking for. (Diagnostic clarification? Medication augmentation? Transfer of management? Second opinion?)

Skip (unless clinically material)

- Full 30-page EHR data dump. A focused referral note is more useful than the whole chart.
- Social history detail that isn't relevant to the referral question.
- Speculation about diagnosis you're not comfortable making. The psychiatric evaluation will handle that.

What you'll get back from shrinkMD

- Confirmation your patient is scheduled, within 24 hours of the referral.
- Post-evaluation note within 7 business days: working diagnosis, plan, medication started, follow-up cadence, and one line on what to watch at the next PCP visit.
- Update note at every substantive medication change.
- A direct line to the treating clinician if a coordination question comes up.

Fit note. shrinkMD is a good fit for adults with mood, anxiety, OCD, sleep, PMDD/postpartum, or adjustment concerns who can use cash-pay (superbill provided) and don't need controlled substances. For patients needing stimulants, benzodiazepines, in-person care, hospitalization, or under-18 care, we aren't the right practice. If in doubt, use the inquiry form at shrinkmd.com/refer and we'll say yes or no plainly.