

ABA caseload and funding tracker

One row per client: team, funding period, funding balance, bookings and flags.

therapycrm.io

Supervising clinician

Review period

Prepared on

Prepared by

Caseload and funding balance

Client ref	Delivery team	Funding program	Period ends	Approved (hours or \$)	Used to date	Balance	Booked ahead	Flag and next review

Weekly funding balance check

Reconcile used figures with completed sessions and invoices. Compare booked-ahead sessions with each balance. List funding periods ending within [number] weeks. Record every correction with its reason and who made it. Check balances against the source documents before relying on them.

Follow-up this week

Client ref	Concern	Action	Owner	Due