

# Therapy clinic onboarding checklist

One checklist per hire: every role, role-specific lines and a 30-day review. Write an owner and date beside each line. [therapycrm.io](https://therapycrm.io)

New hire

Role and job title

Start date

Manager or supervisor

## Before day one (every role)

☐ Job title and reporting line confirmed in the clinic's own documents

☐ Registration status checked with the regulator (regulated roles)

☐ Record checks confirmed against regulator, funder and clinic policy

☐ Staff account created with only the access the role needs

☐ Equipment, workspace and first-week schedule ready

☐ Named contact for week one, and a supervisor if the role needs one

## Front desk and coordination

☐ Enquiry, intake and consent flow walked through

☐ Booking, rescheduling and cancelling practised on a sample client record

☐ What may be said to a caller, and who may authorize contact, reviewed

☐ Check-in, pickup and escalation of a safety concern shown

## Regulated clinicians

☐ Registration class, conditions and renewal date recorded

☐ Documentation policy and review process shared

☐ Regulator standards on records, fees and advertising reviewed

☐ Supervision of assistants or students arranged

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## ABA team

☐ Job title recorded; restricted titles and credentials checked

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☐ Supervisor named, introduced and meeting pattern agreed

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☐ Families told who supervises sessions

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☐ Data collection and note writing practised on a sample client record

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## Billing and administration

☐ Invoice, receipt and approval process explained

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☐ Funder and insurer recording requirements reviewed

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☐ Access to financial and client records agreed

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## First week and 30-day review

☐ Day 1: tour, accounts working, named contact introduced

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☐ Week 1: privacy, safety and incident orientation complete

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☐ Weeks 2 and 3: first documentation reviewed with feedback

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☐ Day 30: review meeting held; access and training gaps addressed

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Completed by

Reviewed by

Date

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This checklist covers the clinic's own onboarding steps and gives no employment-law advice. Use the job title the person is entitled to use and confirm restricted titles with the relevant regulator.