Onboarding checklist for Kaiser clients with the additional details:

1. \*\*Contact the Parent 📞\*\*:

   - Call the parent to discuss availability and inform them about spot availability or waiting list status (two-week waiting list).

   - Aaron's availability will be 4:30 and 5:30 Monday through Friday, with Saturday hours to start building the caseload.

2. \*\*Reach Out to Richard 📧\*\*:

   - If we do not have an evaluation and proposed goals, reach out to Richard to obtain them.

3. \*\*Collect Credit Card Information 💳\*\*:

   - Obtain credit card information and inform the family that for insurance clients, a $50 charge will apply for missed or canceled sessions.

4. \*\*Send Credit Card Authorization Form 📧\*\*:

   - Email the credit card authorization form to the family for completion and return.

5. \*\*Upload Evaluation and Goals 📂\*\*:

   - Once received, upload the evaluation and proposed goals to the client's profile.

6. \*\*Document Goals in Notes 📝\*\*:

   - Cut and paste the proposed goals from the speech evaluation onto the future note document for the clinician.

7. \*\*Add to Progress Report 📅\*\*:

   - Add the client to the insurance clients' progress report and set the due date.