🌟 \*\*Onboarding New Easter Seals Clients\*\* 🌟

1. 📞 \*\*Call the Parent\*\*:

   - Check their availability.

2. 🖥️ \*\*Add to Simple Practice\*\*:

   - Create a profile for the client.

   - Remember to add "ES" after their name.

   - Indicate they are a minor and add the parent's contact information.

3. 📝 \*\*Set Up Profile\*\*:

   - Select the profile.

   - Click on the \*\*Edit\*\* button.

   - Under \*\*Client Info\*\*, grant access to all clinicians.

   - Hit \*\*Save\*\* at the bottom of the page.

4. 📂 \*\*Share Files\*\*:

   - Go to \*\*Files\*\* and click on \*\*Share File\*\*.

   - Remove RCOC office policy and credit card information.

   - Add the Easter Seals intake.

   - Send it out to the parents.

5. 📄 \*\*Upload Authorization and the speech REPORT\*\*:

   - Upload the authorization to their Simple Practice account under \*\*Files\*\*.

* Upload their evaluation – this can be found on MyEvolv.

6. 📅 \*\*Update Shared Google Doc to indicate the PR and Report due dates\*\*:

   - Go to the shared Google Doc of Easter Seals clients.

   - Report due dates.

   - Add the due date of their progress report (PR) or reevaluation (Re-Eval) to the sheet.

7. 💼 \*\*Update Easter Seals Invoice\*\*:

   - Make sure the invoice is up-to-date with the correct auth and MRI.

8. Cut and paste goals under the new note for the upcoming appointment.