\*Procedure for Onboarding New School District Clients\* Cabrillo Point Academy and Suncoast Preparatory Academy.

To streamline the process for onboarding new School District clients, please follow these steps:

1. \*\*Initial Contact\*\*

   - Call the parent to confirm a time on the schedule.

2. \*\*Add to SimplePractice\*\*

   - Add the client to SimplePractice, including only the parent's phone number and email address.

   - Ensure that no billing information will be sent to the parent.

   - Mark the service as virtual under SimplePractice, as most school district contract services will be virtual.

3. \*\*Send Corresponding Email\*\*

   - Send out a corresponding email link to the family.

4. \*\*Upload Goals and Session Notes\*\*

   - Using your kbruningCPA login for Cabrillo Point Academy students, upload their goals to the files.

   - Cut and paste their goals under a new note for the upcoming session.

By following these steps, we aim to ensure a smooth and efficient onboarding process for new School District clients.