**First Session Process**

**What to do before the first session has been completed**

*Review New Client Form (NCF)*

1. Upload the NCF to Halaxy or your choice of CRM under a specific section such as the "New Client Form" section
2. Review the NCF and check that they have filled out all the information you need.
3. Outline the Key information that your business needs below so that the next administrative support knows what to look for. For example:
* Name
* DOB
* Phone Number
* Address
* Email
* Emergency Contact
* Credit Card details
* Reason for referral
1. Create a space (preferably on Asana or Halaxy or both) where you have a running document of “Notes” that you can use to communicate with the therapist
2. Once uploaded to Halaxy, note any outstanding information that can be found in the “Notes” document of your choice
3. Important: If the client noted they have an issue with walking, point this out to the therapist and ask the client to bring Doctor Clearance Form to their first session and point out to the client that they can also do the session sitting down.

**What to do after the first session has been completed**

1. Email "Referral Acceptance” to referrer if applicable
2. Ensure all missing information has been received from the Therapist
3. Update Asana/Halaxy if information is still missing
4. Note client’s reason for accessing your service in Marketing Area.
5. Process Payments required for the session