**New Client Checklist**

This is a Checklist to keep you on track of all the things we need to complete before, during and after that first session with a client.



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| **THE DAY BEFORE YOUR FIRST SESSION** |  **Complete**  |
| **1.** | I have checked my calendar for any new clients booked |  |
| **2.** | I have called my clients and reminded them:* To complete the New Client Form
* To bring any documents or referrals that we need
* To bring any concession cards if needed
* Of the meeting place and let them know how to identify me
* I will spot them before they spot me and confirmed their mobile number in case I need it on the day
* Of our phone # in case they get lost/are running late
 |  |
| **ON THE DAY** |  |
| 1.
 | * I have checked that the New Client Form has been completed via phone / tablet / paper
 |  |
| 1.
 | * I have checked that any relevant documents, concession cards or referrals are present
 |  |
| 1.
 | * If admin has notified me of any missing information, I have made sure I have received it today
 |  |
| 1.
 | I have reminded the client of their:* Rights and responsibilities (including right to choose their therapist)
* Privacy and Confidentiality (including any reporting needs, running into someone they know, limitations of confidentiality such as self-harm or legal requirements)
* Our cancellation fee without 24 hour notice
 |  |
| 1.
 | * I have asked my client to complete the quality measure such as the ORS
 |  |
| Any other notes from the day: |  |
| **AFTER THE SESSION**  |  |
| 1.
 | * I have asked my Client to complete a quality measure such as the SRS
 |  |
| 1.
 | * I have booked in their next session
 |  |
| 1.
 | * I have completed/reviewed why my Client chose a walk and talk service
 |  |
| 1.
 | * I have given my Client an appointment card
 |  |
| 1.
 | * I have updated any outstanding information on Halaxy or your choice of CRM
 |  |

**Any other information if needed:**

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