

Admin Onboarding Checklist



This is the basic template that we use to onboard and train new virtual assistants at Productive Therapist. We removed the items that are specific to us, so that this will be most useful for you and your practice.

Week 1 : training

Week 2 : shadowing

Week 3 : getting started

Training & Onboarding Schedule

Week 1 - complete training tasks

- Schedule 1 hour training with practice owner
- Schedule 1 hour training with practice manager
- Review practice call script
- Complete Teachable course (includes info on our systems, billing, etc.)
- Complete [HIPPA training](#) (2 hours)
- Read through all practice FAQs - add link here
- Review our software platforms: see list below (1 hour)
- Read up on counseling 101 topics: see links below (1-2 hours)
- Complete Sexual Harassment training
- Email practice owner a good photo of you for our team page
- Review [Mental Health Terms](#) document
- Schedule introduction calls (phone or video) with all clinicians
- Complete first week check-in with practice manager

Week 2 - shadowing

- Begin returning calls and emails from new inquiries with practice manager (on Zoom)
- Complete second week check-in with practice manager

Week 3 - getting started

- Begin returning calls and emails from new inquiries on your own
- Complete third week check-in with practice manager

Other Tasks

Review our software platforms (1 hour)

- simplepractice.com
- phone.com
- [ToDoist](#)
- Add others as needed

Read up on counseling 101 topics (1-2 hours)

- [Difference between LMFT, LCSW and LPCC](#)
- [Difference between a psychologist and a psychiatrist](#)
- [Depression - diagnoses & treatment](#)
- [Anxiety - diagnoses & treatment](#)
- [How to Treat the 5 Most Common Mental Health Disorders](#)
- [How therapy/counseling helps with mental health challenges](#)
- [What is EMDR?](#)
- [What is CBT? \(Cognitive Behavioral Therapy\)](#)
- [Treatment approaches for substance abuse problems](#)

Training Topics:

	A	B
1	Practice Owner	Practice Manager
2	Overview of general services	Review practice policies & procedures
3	Values & mission	Basics of using SimplePractice
4	Setup process for new clients	How we handle insurance
5	Overview of first 3 weeks	Any other relevant topics

Start-Up Tasks: to be completed by us

- Set up email address
- Add to SimplePractice
- Add to ToDoist
- Add to LastPass
- Add assistant to Sexual Harassment Training
- Send Employee Manual for signature
- Enroll in Teachable training courses
- Add whatever else you need