

SOP Outline



Here is the top level outline for our standard operating procedures. The section for leadership resources is only available to the leadership team, while the therapist resources and professional development content is available to the whole team.

We organize and share all of this information using a tool called Waybook that gives us a lot of flexibility and useful features.

Therapist Resources

- Community
 - Fun Stuff
 - Staff Meetings
 - Trainings
 - Consultation Groups
- Practice Info
 - Guiding Principles
 - Leadership Team
 - Forms
- Employment Info
 - Employee Benefits
 - Employee Manual
- Clinician Onboarding
 - Start Here
 - Office Information
 - Phone & Email Systems
 - Document Sharing & Chat
 - Insurance Information
 - SimplePractice
 - Referrals

Leadership Resources

- Attract
 - Marketing
 - Networking
- Convert
 - Intake Process
 - Intake Metrics
- Deliver
 - Client Retention Plan
 - Treatment Guidelines
- Collect
 - Insurance
 - Invoicing
- Human Resources
 - Hiring
 - Onboarding
 - Evaluating
 - Payroll

SOP Outline



Professional Development

- Family Therapy Training
- Client Retention Training
- Community Networking Training
- Clinical Resources
 - Book Recommendations
 - Law & Ethics
 - Interventions
 - Medication
 - Referrals
 - Assessment
 - Sonoma County Resources
 - Treatment Planning