Step 1: Client contacts CBTeam (via intake form on website, direct referral, etc...)

Step 2: Intake Coordinator (Nathan) sends information to the client informing them of policies/process.

Step 3: (If the prospective Client wishes to proceed), an intake call is scheduled and completed over the phone by Nathan. All answers are entered into SP.

Step 4: Every Tuesday morning, Nathan presents the previous week's worth of clients to the clinician team who will request they be added to their waitlist if they feel it will be a good match.

Step 5: By EOD Tuesday, prospective clients will be informed of their status on the waitlist, and no further action is needed.

Step 6: Once a clinician has an opening in their caseload, they let Nathan know. Nathan then reaches out to the client on the waitlist to inform them and share paperwork.

Step 7: Once paperwork is complete, Nathan sends an email connecting the client and the clinician, and the scheduling for the first appointment can begin!

CBTeam Intake Process Flow Chart
Aug 25, 2022