

The ABA Intake Checklist

Every step from first contact to first session. Use it to run a single family through intake — or map your own funnel and find where families are leaking. Free to adapt for your practice.

PHASE 1 · FIRST CONTACT — SAME DAY

- ☐ **Respond within minutes** — every channel (phone, form, chat, text), including evenings & weekends.
- ☐ **Capture the essentials:** child's name & age, diagnosis status, insurance carrier, zip code, availability.
- ☐ **Set expectations** — tell the family exactly what happens next, and when they'll hear from you.
- ☐ **Log the inquiry** with source and timestamp — unanswered contacts are your most invisible leak.

PHASE 2 · QUALIFICATION & INSURANCE — WITHIN 24-48 HOURS

- ☐ **Collect insurance details** — payer, member ID, group ID, subscriber, photo of the card.
- ☐ **Verify benefits:** ABA coverage, network status, deductible & copay, visit limits, auth requirements.
- ☐ **Confirm service fit** — location/service area, setting (home / center / school), open capacity or waitlist.
- ☐ **Tell the family the result** — verified, pending, or not covered, with clear next steps for each.

PHASE 3 · DOCUMENTS & CONSENTS — WITHIN 1 WEEK

- ☐ **Diagnosis report** received (request records release if the family doesn't have a copy).
- ☐ **Intake packet** completed — digital, phone-friendly, pre-filled with everything already provided.
- ☐ **Consents signed:** consent to treat, HIPAA acknowledgment, release of information, financial & cancellation policy.
- ☐ **Automatic reminders** firing at day 2 and day 5 for anything missing.

PHASE 4 · ASSESSMENT & AUTHORIZATION

- ☐ **Assessment scheduled** — booked at the earliest interaction, contingent on verification clearing.
- ☐ **Assessment completed** and treatment plan drafted.
- ☐ **Authorization submitted** and tracked against the payer's timeline.
- ☐ **Weekly status update** sent to the family while the auth is pending — silence is the last big drop-off.

PHASE 5 · ONBOARDING — FIRST SESSION

- ☐ **Team assigned** (BCBA + RBT) and recurring schedule confirmed with the family.
- ☐ **First-day details sent** — where, when, who, what to expect, and how to reach you.
- ☐ **First session held** — and the funnel numbers updated: inquiry → verified → documented → started.