



# The Pillar Code™

## TPC ONBOARDING TO LICENCING - ADMIN SERVICE

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The Pillar Code is offering its 'Onboarding to Licencing' administration service to Practitioners. This 10-hour admin package supports you and your clients, leaving you to do what you do best.

### INCLUSIONS

- Send 'Welcome and Onboarding' Emails (Forms, Schedule, Wheel, Socials)
  - Send, collect and upload signed Intake & Consent Forms
  - Create Client Shared Folders
  - Send folder link for all Zoom recordings (downloaded by Practitioner)
  - Upload The Pillar Code Program Client File Template, Licencing Rubric, Initial Licencing/Re-Licencing Check List in the Practitioner's Admin Folder
  - Upload all Pillar documents to the Clients Shared Folder (Journey Journal, FOGs Template etc)
  - Upload all Tools and Sealings to the Client Shared Folder for each Pillar
  - Send an email notifying the client of recordings, Tools, Sealings & documents when uploaded
  - Answer any admin-related queries from the client
  - Remind both the Practitioner and Clients of Testimonials, Reviews & Referrals
  - Following the Practitioner's go-ahead, upload the completed folder for Licencing approval
  - Send Survey to the client for feedback
  - Send information and book clients into further programs ie The Expansion Code
  - Cc Practitioners in all emails sent to the client
  - Documents sent through our DocuSign account where required
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### IT DOES NOT INCLUDE

- Booking the client's appointment times
  - Rescheduling appointment times, if required
  - Creating a recurring zoom link for the client
  - Downloading the recordings following each appointment
  - Sending the invoice - unless prior arrangements have been made or ZipMoney etc
  - Uploading Client Notes, Case Report, PREP Testing forms and Fix-It-Lists for Licencing Approval
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### NOTE

- An additional hourly fee of \$35ph will be charged if more than 10 hours is required
  - Practitioners accepting referrals from The Pillar Code or another Practitioner MUST utilise the Client Onboarding Admin Service for all succeeding programs.
  - The Practitioner will be copied (cc) into all emails to the client.
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### FEES

- Client Onboarding Admin Service - is \$350 (AUD) including GST per client

