Associate employment classification review

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before accepting an associate role and whenever the employer, pay arrangement, ownership, or setting changes.	This cannot classify employment, resolve wage law, or approve a setting; obtain professional advice where facts conflict.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1

[ ] Name the legal employer

Record the entity shown on the written offer and payroll records, not merely the brand name.

Your record: _____

Source: BBS: LMFT resources and forms

2

[ ] Record the setting type

Describe where services occur and compare that fact with the current Board definitions.

Your record: _____

Source: BBS: statutes, regulations, and law changes

3

[ ] Preserve compensation evidence

Keep the offer, pay statements, and any written reimbursement or fee arrangement.

Your record: _____

Source: BBS: LMFT resources and forms

4

[ ] Map the supervisor relationship

Record how the supervisor is connected to the employer and who directs the work.

Your record: _____

Source: BBS: LCSW resources and forms

5

[ ] Check advertising and billing

Record the name, title, registration, and entity used publicly and on client-facing material.

Your record: _____

Source: BBS: HIPAA, telehealth, advertising, and notices

6	**[ ] Escalate contradictions** Stop relying on verbal assurances when the contract, payroll, setting, and supervision facts disagree. **Your record:** _____ Source: BBS: statutes, regulations, and law changes

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- BBS: LMFT resources and forms
- BBS: statutes, regulations, and law changes
- BBS: LCSW resources and forms
- BBS: HIPAA, telehealth, advertising, and notices

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.