Supervisor change handoff

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before the last meeting with an outgoing supervisor and before claiming time under the next one.	This does not replace Board agreements, weekly logs, or experience-verification forms.

Working record

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

Six review points

1

[ ] Set the last supported date

Identify the final date and work setting covered by the outgoing supervisor.

Your record: _____

Source: BBS: LMFT resources and forms

2

[ ] Reconcile unsigned weeks

List every open weekly record and resolve discrepancies while the relationship is active.

Your record: _____

Source: BBS: LCSW resources and forms

3

[ ] Request closeout documents

Use the current Board forms for your registration and keep copies of what was signed.

Your record: _____

Source: BBS: LPCC resources and forms

4

[ ] Verify the incoming supervisor

Check current license status and record the date of the lookup.

Your record: _____

Source: DCA license lookup

5

[ ] Create the new agreement calendar

Track the required agreement, assessment, and setting-specific steps from the new start date.

Your record: _____

Source: BBS: LMFT resources and forms

6	**[ ] Mark the unsupported gap** Do not blur a period without qualifying supervision into either relationship. **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: LCSW resources and forms
- BBS: LPCC resources and forms
- DCA license lookup
- BBS: statutes, regulations, and law changes

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