

You're in. Here's what happens next.

Your ClinicMonk™ Onboarding Roadmap

1. Complete your questionnaire

Open your "You're officially in!" welcome email and fill out the questionnaire. Allow 30-60 minutes on a laptop. Read the linked checklist first.

2. Create your Training Vault login

Create a separate login for the Training Vault so you can access the articles and videos. This is separate from your ClinicMonk™ login.

3. Book Onboarding Call 1

After you submit your questionnaire, an email arrives with the link to book your first 30-minute call. Check spam if you cannot find the booking email.

4. Onboarding Call 1: Connect Your Account

Your admin is not needed for Call 1; bring them to Call 2.

Before your call, review the onboarding checklist linked at the beginning of your questionnaire. It lists everything you need to bring to the call, including your business information, domain login, Google Analytics login and Google Ads access, if you use it.

ClinicMonk™ support will help connect your email, phone number, Google Analytics and Google Ads, if you use it. We link ClinicMonk™ to your domain so emails use your clinic's address and name; your website stays where it is.

You'll also choose and purchase a ClinicMonk™ phone number. This starts identity verification so our team can submit your texting registration, even if you plan to transfer your existing number.

If you don't have access to your domain settings, your domain provider will need to help make the required changes before verification can be completed.

5. What happens after Call 1

Our team will email your next steps and instructions for booking Call 2.

Texting approval usually takes 7-14 days after we submit your application. Sometimes it takes longer because approval is handled by an external provider.

Domain verification usually takes up to 24-48 hours after the correct DNS records have been added by our team or your domain provider.

6. Onboarding Call 2: Walkthrough of ClinicMonk™

Allow about a week between calls so there is time to connect your email domain and get your phone ready. We want those set up before your second call so we can focus on showing you how to use ClinicMonk™. If approval takes longer, our team will let you know whether your call needs to be moved.

Bring your admin if they will be running your CRM.

7. Give your website person and Google Ads agency the next steps

We will give you the exact links to send them. After we confirm your setup is ready, send your website person the contact form, online booking link and phone number.

If you use Google Ads, send your agency the Google Ads checklist to finish the Google setup so your Google Ads show up in ClinicMonk™ and populate your dashboard.

BAA: signing alone does not complete activation

Sign your Business Associate Agreement (BAA), then wait for the email confirming that your protections are active. This confirms activation is complete. Wait for it before adding patient information.