A LITTLE MORE CLARITY, ONE STEP AT A TIME

Your Practice Workflow Guide

Simple tips to help you organise everyday admin, streamline your systems and create a smoother experience for your clients.

Running a practice involves plenty of small details. A clear process can make those details easier to manage, without changing everything at once.

This guide is for allied health practitioners and practice teams. Whether you're starting out or improving your current setup, it will help you explore how your software, forms and communication work together.

Start with one client journey

Think through each step, from the first enquiry to booking, forms, appointments, payment and follow-up. Notice where information is repeated, extra follow-up is needed or the next step isn't clear.

A small place to start

If clients often ask where to find their forms, check the welcome email and form link first. A clearer message may help more than adding another reminder.

Inside this guide

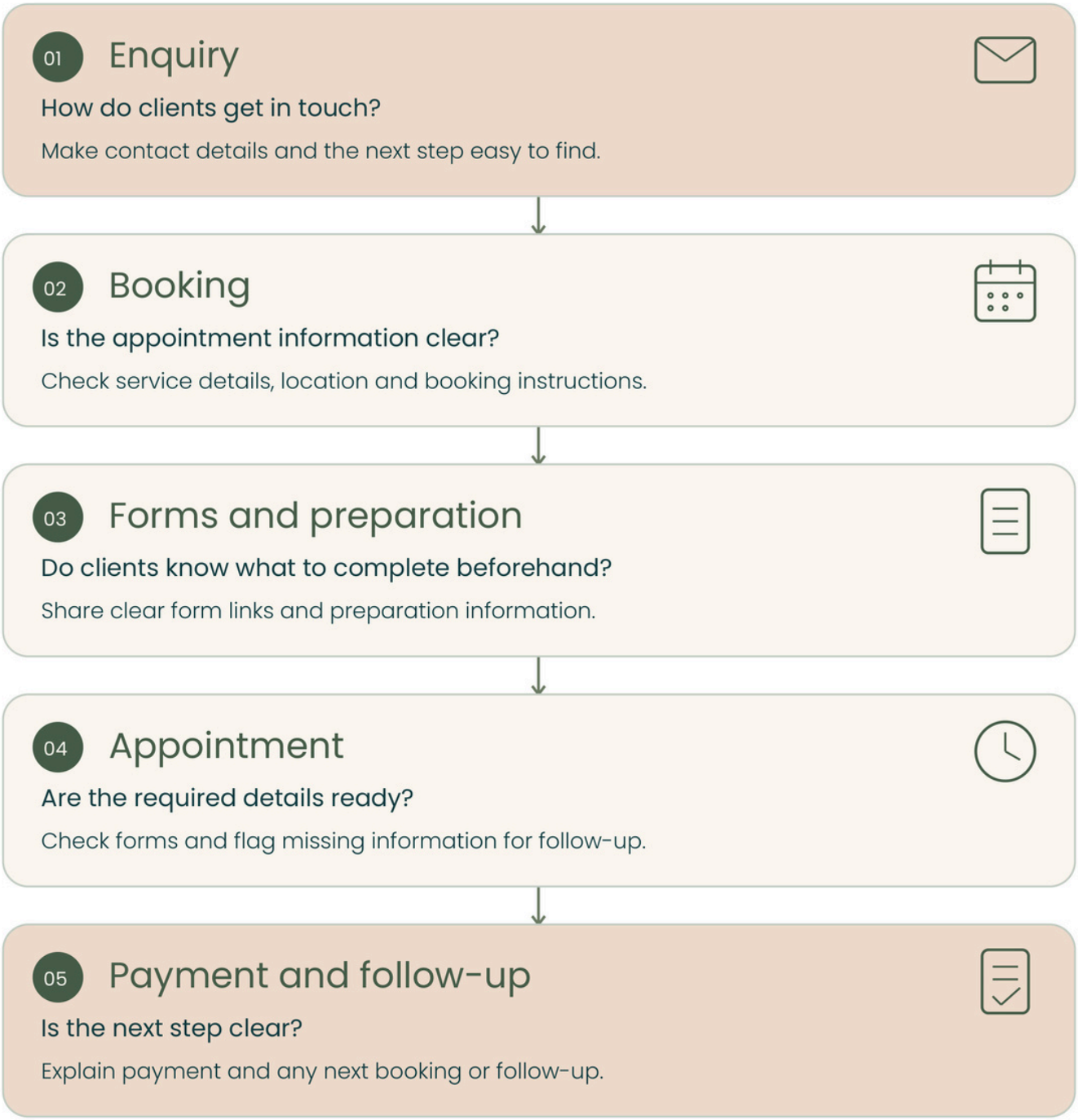
02 Follow your client journey
03 Give every day admin a clear place
04 Make the next step easy for clients
05 Help your systems work together
06 Choose your first small improvement

Work through the ideas at your own pace and choose what suits your practice. There's nothing you need to send back to Sage Admin Solutions.

FOLLOW YOUR CLIENT JOURNEY

Make each step a little clearer

Every practice works a little differently. Use these steps to notice where clearer information or a small change could make admin easier.



Choose one step to review. A small improvement is a useful place to start.

ORGANISE EVERYDAY ADMIN

Give each task a clear place

A simple routine helps you and your team see what needs doing, who is looking after it and what is still waiting.

Keep one clear task list

Choose one place your practice uses to track admin tasks. Record the next step, who will look after it and when it needs attention. Keep sensitive client information in the appropriate practice record.

Make waiting tasks easy to follow

Use simple labels such as To do, Waiting and Complete. If a task is waiting, note what is needed and when to follow up.
For example: a referral has been requested from a client, with a date set to check whether it has arrived.

Make time for everyday admin

Set aside regular time to check forms, follow up unpaid invoices and upload documents. Having a routine helps keep these tasks on track, with a clear plan for anything that needs attention sooner.

Keep documents easy to find

Use consistent document names and save each document in the right place. Before saving, check the client, document and date, then confirm it opens in the correct record.

Try this this week

Choose one task that often gets carried over. Decide who will look after it, when it needs attention, and what needs to happen before it can be marked complete.

A useful task note: Check missing intake form | Owner: practice admin | Review: before the first appointment | Complete when: form received and reviewed, or the agreed follow-up step recorded.

CREATE A SMOOTHER CLIENT EXPERIENCE

Make the next step easy

Clear, friendly communication helps clients feel prepared and saves your team from repeating the same instructions.

Give each message a purpose

Use your welcome email to explain what clients need to do before their first appointment. Keep reminders focused on attending the appointment. If there's more information to share, link to a page or document so the next step stays easy to find.

Keep forms clear and relevant

Check your forms for repeated questions, outdated information and unclear instructions. Ask only for what your practice needs. Have the appropriate practitioner or practice owner approve changes to clinical questions, consent wording and practice policies.

Look at things from the client's side

Open your welcome email on a phone. Can you easily find the form link, appointment location or telehealth instructions, payment details and who to contact? Check that links work and the instructions reflect your current process.

Make follow-up clear

Decide who follows up incomplete forms, missing information and unanswered enquiries. Record what has been done and the next step, so everyone involved knows where things are up to.

Try this this week

Read one message as though you are a new client. Ask: What do I need to do? When do I need to do it? Where can I get help? Make those answers easy to see.

STREAMLINE YOUR SYSTEMS

Make everyday processes easier

Clear steps help you and your team make better use of your software.

Start with the steps

Choose one repeated task and write down how it is completed. Look for information entered twice, extra steps or uncertainty about who does what. Consider what could be simpler before adding another tool.

Keep your details consistent

Check appointment names, lengths, locations, fees and message templates against your practice's current information. When something changes, update it wherever it appears so clients and staff receive the same details.

Automate one task at a time

Start with a routine task, such as sending an appointment reminder. Check what your software supports and whether an existing setting already does the job. Decide who will follow up if something needs attention.

Check changes before using them

Use an approved test record and your own contact details where appropriate. Check messages, links and what happens next, including when information is missing. Avoid processing real payments or claims during testing, and keep a note of any changes.

Try this week

Choose a task where you enter the same information more than once. Explore whether your software can carry those details through to the next step, then check that it works before changing your routine.

Software features vary. Follow your provider's instructions and your practice's procedures for system access and handling client information.

YOUR NEXT SMALL STEP

Start small. Build from there.

You don't need to change everything at once. One small improvement is a helpful place to begin.

Choose one improvement

Start with a task that often leads to repeated questions or extra follow-up. Choose a small change you can try, check and adjust.

Your simple action plan

The task we want to make easier: _____

The first change we'll try: _____

Who will look after it: _____

When we will review it: _____

How we will know it has helped: _____

For example: Make the form link easier to find in your welcome email. Have the practice owner approve the wording, then update and test the email. After two weeks, check whether fewer clients need help finding their forms.

A little support along the way

Sage Admin Solutions supports allied health practices with software setup, system reviews and refreshes, forms and template updates, and ongoing admin.
If you'd like a hand putting these ideas into practice, we'd love to hear from you.

sageadmin.com.au | info@sageadmin.com.au

Taking care of your business, so you can focus on what you do best.

This guide shares general administrative ideas to adapt to your practice. Have the appropriate person approve changes involving clinical content, privacy, billing or funding requirements. It does not assess or certify compliance.