BONUS Admin Checklist - The McCance Method

Virtual Tasks	Any writing in red are suggested tasks or instructions from us, feel free to customize this sheet based on your own needs. If you are brick and mortar both of these lists should be combined	
	Task	**Notes**
☐	Answer phone calls	
☐	Track the Admin email account	- inbox should be organized and empty at the end of each shift - refer to email templates in google drive when sending recurring emails (you will have made some as you go through the content hub, they should be shown these templates during training)
☐	Monitor internal messenger chats	- this should be monitored for the duration of your shift - complete to-dos from therapists and clinic owner
☐	Check that all clients payments went through	Therapists will be processing payments at the end of every session, please double check that it says paid on each appointment. Follow up with therapist if it doesn't
☐	Quailty assurance check - day of and next day appointments	- ensure payment information is accurate and updated - make sure intake forms and consent forms are complete for all new clients this week
☐	Update manuals with any new or changed processes	
☐	Book appointments	
☐	Contact new clients/potential clients	
☐	Billing and invoicing	- paying invoices to vendors (send to clinic owner to approve first) - billing third parties for any insurance work
☐	Screening candidates	
☐	Onboarding new hires	
☐	Training new hires	
☐	Daily review of the consult call tracker and follow up	
☐	Doing a QA check of the online booking (merging any duplicate profiles) and making sure that your practice offers consults within 48 hours	-Updating you on any online booking issues
☐	Update expense sheet daily after reviewing the bank and confirming that this expense has been withdrawn	Nicole gave them access to her bank login details only after working with them for some time and deciding they were trustworthy
Brick and Mortar		
	Task	**Notes**
☐	Tidy up waiting room	- clean dirty mugs left in the waiting room - wipe down all surfaces - stock waiting room (tea, water etc.) - ensure intake forms are stocked
☐	Opening tasks	
☐	Closing tasks	

☐	Arrive all clients	When the client arrives in the office, arrive them in the calendar so the therapist knows they are waiting in the waiting room
☐	When the client is done their appointment, process their payment in Jane via credit card.	If you get really busy you can have your admin process payment as soon as the client walks in the waiting room, that way if the credit card doesn't go through they will have time to get that info. Sometimes when clients are done their appointment, because they know we have their credit card on file in our practice management software they just leave and its harder to reach them for this info (can lead to phone tag)
☐	Handle sick calls from therapists	This task will be dependent on your policies for sick calls, usally it requires moving clients to another day
☐	QA check- updating computers (software updates) otherwise the front desk computer will be really slow. Also, erasing voicemails so the inbox doesn't get full	This should be scheduled once a week
☐	Managing the treatment rooms, making sure each therapist is in their designated room and when they leave it is tidy for the next therapist	
☐	Ordering supplies	