

Day In The Life



This is a template of a document that we create for all the practices we support. It provides a snapshot of the practice info as well as the daily, weekly and monthly tasks that get handled by the admin assistant. This is especially helpful for anyone covering for your admin when they are out.

Practice Information:

- Practice Address - 400 Old Town Road, Ste. 2
- Practice Phone Number - (415) 555-5555
- Admin email address - hello@mypractice.com

Practice owner preferred contact method - email, text, phone call, etc.

Tabs to keep open + passwords:

Gmail, EHR, phone platform, other.

Daily tasks listed in order of importance: (examples below)

- Respond to new emails and voicemails in the morning
- Add new client information to the Referral Log
- Follow up on older client intakes

Weekly tasks:

- Send practice owner an update email every Friday

Monthly tasks

- Add conversion rate metrics to spreadsheet

Any other important practice information about practice:

Example: 48 hour cancellation required or full session is charged to card on file. Get the credit card info when on the phone scheduling the new client.

For minors, a parent-only session should be scheduled first. The therapist will schedule a follow up appointment for the minor after the initial session.