



# 10 Top Tips for Effective Caseload Management in Private Practice



Dr David Bakker

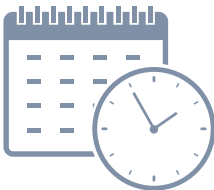
&

Dr Julia Dabrowski

Being a mental health clinician in private practice requires a whole lot more than clinical skills. You are juggling patient appointments, emails, phone calls, letters, invoices, Medicare compliance, data security amongst many other things. These days, managing your caseload effectively seems like a mammoth task but it can be done stress-free with a few simple steps, combined with the right tools for the job. Take a look at these top tips to help look after yourself and your practice better so you can keep looking after others.



**Online calendar, timetabling and booking**



Moving your diary processes online will be one of the most important things you can do for you and your clients.

Primarily it looks more professional to clients and referrers, and that first impression really counts. If someone has an enquiry, you can quickly and easily find what you need without flicking through endless pages or searching for different books. Secondly, it improves the client experience. They can book and cancel appointments when it suits them to reduce your admin workload. You can book multiple appointments so you can ensure you're seeing them in a timely manner. Good calendar systems also allow you to send automatic reminders and outline your cancellation policy. If clients are in charge of their diary, they are less likely to be a no-show.

Finally, and probably most importantly, you can easily block out time for yourself. Block out regular time for admin, annual leave and training. This way you will never let time run away with you and you can keep on top of everything with the peace of mind of knowing it will automatically be blocked in the future.



## Digital paperwork



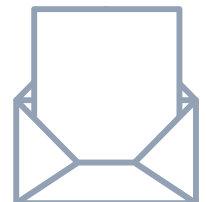
The future of healthcare is moving away from printing out forms and scanning them back in. Online forms are easier to fill in and collate, which creates a smoother experience for you and your clients. For example, you can send forms to them which can be filled in online and automatically collated so you can read them prior to the session.

This gives you and your client more time for what matters in the actual appointments.

By reducing the number of steps involved and keeping things in a GDPR protected online environment, you can ensure effective data protection for everyone involved.



## Set up letter templates

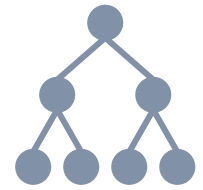


Writing out letters is time consuming and, at times, very repetitive. If you can set up some commonly used letter templates which leave gaps for client information and a personal touch where needed then this can dramatically streamline your working day.

Great online systems will be able to autofill your letter templates with client information and take results from outcome measures in patient records to enable you to write informative and personal letters efficiently.



## **Streamline your onboarding process**



Onboarding takes up a lot of time without making any real therapeutic progress or building up any meaningful relationships. Be ahead of the game and send out these documents prior to the appointment to increase the time you have together in the actual appointment.

This can also give clients the opportunity to read information, fill in forms in their own time and generate any questions they may have. Some clients may find it stressful to have someone watching over them or feel time pressured when completing these forms within an appointment.

A competent integrated system will give you the opportunity to read through your client's forms prior to the session and highlight any areas that need more clarity or investigation.



## **Automate your invoices and accounting**



Keeping on top of invoices and accounts in private practice can be a headache. Unfortunately, they can't be avoided. Some private practices set up their invoices prior to the appointment. This can help maximise your time in the session on higher value activities and also assist if you run over time.

An integrated system which automatically invoices the client for each session will allow you to be even more time efficient. This can help to avoid human error and avoid late payments.

You may outsource your accounting or you may do it yourself. A system which keeps track of invoices and outstanding accounts allows you to only input simple numbers when organising your finances. This integration reduces a potentially mammoth task into bite size chunks, which can be crucial to the success and cash flow of your business.



## **Get into a routine with your note writing**



Every clinician is different. Some like to write their notes straight away while the session is fresh in their mind, others like to leave time at the end of the day and do them all in one go. Whatever your preference, make it a habit. Set time aside in your diary to ensure you get them all done without staying late. This reduces human error, reduces stress and increases your accuracy. Things get missed or go wrong when you rush, leave late or do not plan ahead.

Having an integrated online system will allow you to easily write full or paraphrased notes at a time that's right for you. It keeps all your client information in one place so you don't need to go finding paper files or risk writing in the wrong one!



## **Set firm boundaries and stick to them!**



When you're in control, you perform better as a clinician. Set personal boundaries that allow you to maintain your high standards. Block out time for emails and phone calls. Consider setting an automated reply on your email or voicemail that outlines a timeframe in which you will get back to them. Use this automation to reduce any anxiety that unanswered emails can cause.

Ensure you don't take work home with you or work past a certain time. Work is stressful enough, you don't want that seeping into your home time. It is vital to maintain a work-life balance.

Limit the number of new clients you see a week. New clients always means more admin. Give yourself a chance to stay on top of things by limiting these and spreading them across your week.



## **Go through important policies with your client**



To avoid unwanted complaints or feelings of unfair treatment it is important to cover the policies and ground rules from the initial appointment. You may even wish to guide patients to this section on your website or integrated system prior to the first appointment so you can easily run through them together.

By doing this at the start, you set a level playing field and avoid any feelings of confusion. For example, it can reduce disputes about your cancellation policy and any fees associated with this.



## **Keep on top of medicare compliance**



When your diary is full it's easy to lose track of where clients are up to. New rules around allocated sessions and writing to GPs for additional sessions is more laborious than ever. By automating Medicare compliance via tracked appointment bookings, you will be alerted when action is needed and given full oversight over their total allocation usage. Some systems attach this to the calendar and booking, others attach to the patient profile. Find one that works for your practice and let a proficient system do this basic task for you.



**Invest in an integrated system**



If you’ve found a few different digital platforms to help you with your diary or with your note writing, you will understand how useful a fully integrated system would be.

By having your diary, letters, notes, emails, audits, patient information, policy documents, invoicing, Medicare and accounts all under one succinct system you can keep on top of everything your working day demands of you at the click of a button. You can automate the low value tasks, leaving your time free for what’s important. You can combine your diary with your invoicing and streamline your admin tasks. You can collate audit information without thinking about it so these potentially stressful times can be a breeze. By having everything under one roof there is no need to duplicate client information across multiple softwares.

What is even more important is the data security an integrated system provides. It reduces the log in details needed, reduces human error, reduces sheets of paper getting lost or landing in the wrong hands. Crucially, make sure you invest in a platform which is GDPR and HIPPA compliment for you and your clients safety.

Some systems will work alongside what you already have and others can do everything for you. It might seem like a big jump initially but you’ll thank yourself.



In conclusion, by planning ahead and ensuring you have protected time for yourself and non-clinical tasks you can lead a successful business that delivers top quality care to its clients. Mental healthcare is moving into the future. Investing in automated and integrated online systems is one of the easiest ways to stay at the top of your game and attract prospective clients.