Wellnation Reception Manual

A reference tool for Wellnation Clinic staff and students

Supporting best practice and continuous quality improvement in a caring, consumer-focused, learning and teaching clinical environment.
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Welcome to Endeavour Teaching Clinic – Wellnation Clinics

One of your responsibilities when you commence your clinic practicums at Endeavour will be Student Clinic reception duties. You will be rostered on clinic reception on a rotational basis, throughout your clinical training. This role helps to prepare you for any clinical situation you may find yourself in once you graduate. The learning experience will encourage and foster qualities such as consumer focused interactions, working as part of a team, duty responsibility, and time and reception management. The skills attained will help give your future clients service that will exceed their expectations and ensure that you have those skills necessary to build a successful business.

The main objectives of your time on Reception will be:

- Following instructions from the Clinic Manager, Clinic Supervisor/s and/or Clinic Services Co-ordinators, as appropriate;
- Warm, friendly, welcoming attitude and excellent customer service;
- Answering of incoming calls and adding appointments to the Wellnation booking system;
- Operating the computer Wellnation booking system;
- Organisation of existing client files and preparation of new client files (including archiving);
- Taking of monies for payment of clinic treatments and products and balancing these.

To help guide you through your time on Reception, the Clinic Service Coordinator, Clinic Manager and Clinic Supervisors will be available to you. They are here to supervise, educate, guide and support you. You are always welcome to ask questions or refer to them for assistance.

We look forward to working with you in the Wellnation Clinic and being a supportive part of your learning journey at Endeavour College of Natural Health!

The Wellnation Clinics Team
Clinic Information & Terms of Trade

- Payment must be made at the time of treatment.
- Cheques are not accepted.
- Treatments and products are priced at below market rates. No further discount applies.
- To receive concession and student pricing, I.D. must be shown at the Reception.
- Refunds are not issued for cancelled appointments.
- Any products dispensed are non-refundable.
- Services, once received, are non-refundable.
- There is a 24 hour cancellation policy, if less than 24 hours’ notice is given, this will result in a loss of consultation fees.
- Treatments are not eligible for health fund rebates, as they are not performed by registered health professionals.
- All treatments are performed by students and supervised by qualified practitioners.
Confidentiality and Privacy

Confidentiality can be defined as the non-disclosure of personal, sensitive and health information pertaining to a client that has been disclosed by a Clinic client and collected by students or staff in Clinic sessions. Confidentiality also extends to the personal information of Clinic staff and students (e.g. telephone numbers, addresses, etc.)

Students are advised that any client information collected in Clinic sessions is not to be read, discussed, or disclosed in any manner, including in conversation and/or via social media, without Clinic Supervisor permission.

Client files in any public area are to be placed so the client’s identifying information is not visible to the public waiting at the reception counter. Do not place files directly on reception counter.

Student practitioners, observers, supervisors and clinic assistants are to maintain confidentiality of client information at all times. Clients and their specific case details are not to be discussed outside of the Clinic. Discussion regarding cases may occur within the Wellnation Clinic or classroom environment, however, if Clinic cases are used, any identifying features of the client must be removed (in both written and verbal versions) to maintain confidentiality.

Copies may be made of case notes providing identifying features are removed. Client files and all contents must remain on Clinic premises at all times. Any client files, file contents, or file copies that are left out in the open on premises will be treated as a breach of client confidentiality.

Students should be aware at all times the sensitive nature of client information, particularly given the percentage of clients that are either students, staff, or relatives of students and staff of the College.

Confidentiality and the “Need to Know Rule”

In order to provide client services, Clinic Supervisors and students have a need to know some client health information. Only those persons directly affiliated with Clinic services can access client information that they ‘need to know’, and only to the extent that they need to know it for the provision of client services. This information is to be maintained in strict confidence and is only shared with others who, like themselves, have a need to know in order to provide services to the client. In order to further protect the confidentiality of clients of Endeavour Wellnation Clinics client’s confidentiality, discussion of client information must be avoided in public areas.
Clinic Checklist

Example Checklist
Refer to your Clinic for a checklist specific to your local campus.

At the beginning of the clinic session

☐ Be ready to commence your clinic session at least 15min prior to clinic starting time.
☐ Ensure you are wearing your clinic name tag and professional business attire. There are no bags, food, drink (water excepted), phones or laptops to be kept at reception.
☐ First sessions only: place sandwich boards out to attract potential clients, change black board wording to highlight marketing promotions and available appointments.
☐ Log on to reception computer using your student number and library password.
☐ On desktop click on Student Wellnation icon, log on using student number and password.
☐ Set up reception area and familiarise yourself with current promotions and any new information.
☐ Select banking from side bar> select transactions sessions>find session date and time> select view>change status to open> scroll down to SAVE.
☐ Ensure reception desk and waiting room are presented professionally for your session.
☐ Collect today's client files from locked reception cupboard and place in holder at reception. Ensure clients names not visible to reception waiting room. Prepare manila files for 1st time clients and enter clients name ONLY when they arrive.

During the clinic session

☐ Greet all new clients, then press the icon next to the clients name and select the “Arrived” icon. Update their address, concession & contact details in the Wellnation system. Ask new clients to fill in a client registration form.
☐ Offer all clients water/tea and ask them to please take a seat, then inform the practitioner in the meeting room their client is waiting for them.
☐ Once the practitioner has collected their client click on the “Start Consult” icon.
☐ When the client finishes with the consultation take payment and rebook them for a follow up session.
☐ N.B we are EFTPOS only, we will only accept cash payment if exact money. There is no change.
☐ Process payment, enter into system with RRN number of EFTPOS payment, write the client name on the approved EFTPOS receipt and place on spike in the centre of reception desk.
☐ When you have correctly processed payment a dollar sign indicating paid will appear, then select the “End Consult” icon.
☐ Confirm all client appointments for your session for the next day and advise clients to come in 15 mins earlier to complete the client form if they are a new client, if they are confirmed select the “confirmed icon” - if you were unable to confirm please leave a note in the client’s file>communication tab include current date and your initials. Complete checklist at reception.
☐ Collect client files for next session from filing cabinets. If the 3-6 session place next morning files in locked cupboard in reception. Complete checklist at reception.
☐ Check stock levels and print any clinic forms as needed and make up new client files as needed.

End of the clinic session

☐ Make sure all clients are ‘consult ended’ or ‘no show’ in Wellnation and there is a “$” next to their name (except for no shows).
☐ To close banking: go to banking> transactions sessions>find session date and time> select view>change status to closed>enter the cash (if you have taken any during the session.> save. To print transaction entries go to banking>find session date and time>select entries this will show you the total transactions for the session>print entries. Go thru EFTPOS receipts and match to entries and count cash to match cash taken. Ask your supervisor to sign off on transaction entries.
☐ Attach EFTPOS receipts to top left of transaction summary and place in white pencil case in top draw.
☐ Clean up desk area and leave clinic reception and waiting area as you would like to find it.
☐ Wait until the next Receptionists arrive for the following session to hand over reception duties.
☐ Last session of the day bring in sandwich boards & place protein bars in locked cupboard.
☐ Log off – this is essential, the next user will need to log on.
Beginning of Clinic
Logging on to the reception computer
User name: student:STUDENTNUMBER
Password: password is your DOB

- Request float from Clinic Team unless provided.
- Ensure float equals to correct amount *check with your Clinic Team for your clinic float.
- **Never leave the reception desk unattended; if it is absolutely necessary, make sure the money bag(s) is secure.**
- No food or hot drinks are to be consumed at the front desk, only water.
- Make sure you are wearing your name badge. If you do not have one, please ask for one.
- Reception duties are inclusive of all disciplines- this involves client’s attendance in clinic, phone calls, banking & appointments.

Opening Student Wellnation

- Open Student Wellnation on desktop.
- Log on User name: Student Number  
  Password: password

  ![WellNation - Login](image)

  Will open in Clinic Dashboard.

Next open the banking (see page 11) so you are ready to take any payments when clients arrive.
Printing the Appointment Book

- **Print out 2 copies** of your session's appointment book. One to get out the files and the other for the Supervisor. (If applicable at your clinic, check with the clinic team)

- Go to “Actions” tab on the right hand side of the appointment book use drop down menu to select “Print Appointment Book”. This opens as PDF in bottom lower screen > open> print.

- Get out all the files for the clinic session for return clients.

- Prepare files for **new clients** with all necessary paperwork and have the Client Registration Form ready for them to fill in with their history.
Welcoming and Checking-in Clients

- Greet the client, and ask for their name and appointment time, confirm whether they are new or returning clients then press the icon next to the clients name and select the “Arrived” icon. Update their address, concession & contact details in Wellnation. Ask new clients to fill in a Client Registration Form. Check the consent on front page has been ticked and signed.

- Take the payment for the consultation **upon check in** for all disciplines* Check with your clinic if this is applicable.

- Offer all clients water/tea and ask them to please take a seat, then inform the practitioner in the meeting room their client is waiting for them.

  * If they purchase any products, this will be a separate payment at the end of their consultation.

- Once the client has checked in and paid, inform the meeting room, student practitioner and supervisor.

- Change the client to “Client Waiting”. Once the practitioner has collected their client click on the “Start Consult” icon.

- Then change their status to “Consult in progress” and then eventually “Consult ended”.

**Important Note:**

- **Patient waiting times** – Make sure clients are taken in a timely manner; if the student practitioner is running behind, let the Supervisor and the Client know.

- For Naturopathy/Nutrition clients, take note of their waiting time while students are presenting.
<table>
<thead>
<tr>
<th>Time</th>
<th>Naturopathy Consult...</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00 - 08:30</td>
<td>Booked</td>
</tr>
<tr>
<td>08:00 - 08:30</td>
<td>Confirmed</td>
</tr>
<tr>
<td>08:00 - 08:30</td>
<td>Client Waiting</td>
</tr>
<tr>
<td>08:00 - 08:30</td>
<td>Consult in progress</td>
</tr>
<tr>
<td>08:00 - 08:30</td>
<td>Consult ended</td>
</tr>
<tr>
<td>08:00 - 08:30</td>
<td>No Show</td>
</tr>
</tbody>
</table>
New Clients

- **New clients** are to be provided a Client Registration Form to fill out prior to the commencement of their consultation and asked for it to be brought back to reception when completed – make sure the client has dated and completed all pages of the history forms. Assist them with any questions.

- Check and update client details: address, phone numbers, and email address into Wellnation.

- If the client has a valid concession card, please sight the card so the client is eligible for the concession discount.

- If the client has a university student card, please select client type> Concession or Endeavour Student in client file.

- PLEASE NOTE: Record student card/Concession card expiry date in client file. Students with expired university cards are not eligible for the student discount.

- Prepare a manila folder for the client’s file; write in texta(marker pen the last name in capitals and given name in lower case on the top left. **Always** write the client’s PIC number on the top right of the folder:

I.e.: SURNAME, Given name PIC: 12345

The PIC (also known as the Patient/Client Identification Code), is generated in Wellnation when the clients details are entered.
Daily Banking: Opening a transaction session

1. Go to clinic dashboard > side bar > banking > transaction sessions > find your session > click view

2. Record the opening cash and open the transaction session. Check Float with Supervisor and enter denominations for opening cash balance. When done change status of transaction session from ‘Planned’ to “Open” > save.
## New Transaction Session

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>Cash Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-11-11</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session Start</th>
<th>AM/PM</th>
<th>Session End</th>
<th>AM/PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:00</td>
<td>AM</td>
<td>2:30</td>
<td>PM</td>
</tr>
</tbody>
</table>

**Transaction Register**

Gold Coast

**Opening Cash Balance, total: $100.00**  

<table>
<thead>
<tr>
<th>Coins</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Cent Coins</td>
<td>4</td>
</tr>
<tr>
<td>10 Cent Coins</td>
<td>8</td>
</tr>
<tr>
<td>20 Cent Coins</td>
<td>10</td>
</tr>
<tr>
<td>50 Cent Coins</td>
<td>4</td>
</tr>
<tr>
<td>1 Dollar Coins</td>
<td>5</td>
</tr>
<tr>
<td>2 Dollar Coins</td>
<td>5</td>
</tr>
<tr>
<td>5 Dollar Notes</td>
<td>2</td>
</tr>
<tr>
<td>10 Dollar Notes</td>
<td>3</td>
</tr>
<tr>
<td>20 Dollar Notes</td>
<td>2</td>
</tr>
<tr>
<td>50 Dollar Notes</td>
<td></td>
</tr>
<tr>
<td>100 Dollar Notes</td>
<td></td>
</tr>
</tbody>
</table>

**Closing Cash Balance, total: $0.00**

Enter the number of coins and notes below.

**Save**
Payments

- You must record **ENTER** payments and vouchers as per the examples below.
- For **EFTPOS** payments, write the **client's last name on the Merchant Copy** and circle 'Approved'.
- At the end of each clinic, staple all the EFTPOS receipts together and attach to transaction entries.

**Processing a Single Payment**

1. Click on the client's name on Dashboard, this takes you into appointment details screen.
2. Go to Actions>Create Invoice.

3. Confirm consultation details are correct, click Next.

4. Always sight student and concession cards and ensure they are valid.
5. Prompt payment from the client, asking how they would like to pay (cash or card).
6. **Select Payment Method**, and then select the correct mode of payment: Cash, EFT, Credit Note or Gift Voucher.

7. Enter details for the selected payment method:

   **For EFT Payment**

   Enter RRN from EFTPOS slip:

   ```
   SOUTHPORT AU
   MERCHANT COPY

   Acquirer  NAB
   Merchant ID  46434940
   Terminal ID  Min129
   Country Code  AU
   Date/Time 14/11/16 14:08
   RRN  000001000096
   MASTERCARD  
   ```

   Select transaction session from drop down box.

   ```
   Select Payment Method
   ☑ Cash  ☑ Card  ☑ Credit Note  ☑ Gift Voucher
   ```

   ```
   Amount to Pay
   $ 7.5
   ```

   ```
   Reference Retrieval Number (RRN)
   1000096
   ```

   ```
   Transaction Session
   2016-11-15 08:00am to 11:00am Gold Coast
   ```

   Click “Pay” to complete payment.
**For Cash Payment**

- Select the "Cash" option and fill in the amount received.
- Check that the selected transaction session is correct.
- Click "Pay" to complete payment.

**Select Payment Method**
- Cash  
- Card  
- Credit Note  
- Gift Voucher

**Amount to Pay**

$ 80.4

**Transaction Session**

2016-08-02 11:30am to 02:30pm Melbourne Ground Floor - Homeopathy

*Go back to Order page.*

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**For Credit Note Payment**

- Select the "Credit Note" option.
- Select the credit note to use from the drop-down.
- Fill in the amount to use from the credit note.
- After that is done, click on "Use".

**Select Payment Method**
- Cash  
- Card  
- Credit Note  
- Gift Voucher

**Select credit note:**

$100.00: Daily Draw (2016/09/16) - Raffle prize

**Amount to use**

$ 50

*Go back to Order page.*
For Gift Voucher Payment

 Optionally, redeem the gift voucher. If the gift voucher hasn't been linked to the client’s account yet, click on “Redeem a gift voucher”. This will reveal the voucher redemption form.

Select Payment Method

- Cash    - Card    - Credit Note    - Gift Voucher

Redeem a gift voucher

Use funds from a voucher redeemed by the client:

Select Voucher

Amount to use

$  Use

Go back to Order page.

Enter the gift voucher code in the “Redeem a gift voucher” field. Click on "Redeem".

Select Payment Method

- Cash    - Card    - Credit Note    - Gift Voucher

Redeem a gift voucher

DoetWyGz7

Use funds from a voucher redeemed by the client:

Select Voucher

Amount to use

$  Use

Go back to Order page.
Click on the “Select Voucher” dropdown menu. In the next field, select the gift voucher from the list to use funds to pay for the sales order.

Use funds from a voucher redeemed by the client:

Select Voucher

Select Voucher
DoetWyGz7: $75.00

Amount to use
$ 25

Process the payment. Fill in the “Amount to use” field from the gift voucher. Once complete, click on “Use”.

Select Payment Method

Cash  Card  Credit Note  Gift Voucher

Redeem a gift voucher

DoetWyGz7

Use funds from a voucher redeemed by the client:

DoetWyGz7: $75.00

Go back to Order page.
Processing Multiple Payments for a Sales Order

It is possible to process more than one payment for a single sales order, whether using the same payment method or not.

Consider, for example this $80.40 sales order for a client who has an unused $75 gift voucher. The client makes a payment of $75 from the gift voucher:

Since this is not sufficient to complete an order, a successive cash payment of $5.40 is made.

If the partial payment is made at another time, go to the payment page to process the partial payment. You can go here by clicking on "Pay Order" in the "Actions" drop-down on the upper right-hand corner of the sales order page.
Applying Discounts to a Sales Order

Go to the sales order setup page. For new sales orders, this is the form you reach after selecting the client for the sales order. For existing sales orders, you can go here by clicking on "Edit Order" in the "Actions" drop-down on the upper right-hand corner of the sales order page.

At the bottom of the sales order setup form, you will see a section "Apply Promotional Discount". Select the discounts to apply to the sales order. Multiple discounts may be applied. Note that, in cases where more than one discount is applicable for a line item, the discount that was added first is used.

Order Summary

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Description</th>
<th>Unit Price</th>
<th>Unit Price GST</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>BioCeuticals Vitamin E 60 caps</td>
<td>$36.92</td>
<td>$3.68</td>
<td>$81.00</td>
</tr>
<tr>
<td>1</td>
<td>BioCeuticals Zinc Sustain 60 tabs</td>
<td>$17.73</td>
<td>$1.77</td>
<td>$19.50</td>
</tr>
</tbody>
</table>

Subtotal GST $9.13
Subtotal $100.50
Total GST $9.13
Total $100.50

Payment Details
- Method
- Amount
- Total Paid $0.00
- Amount Remaining $100.50
Adding a discount will automatically compute the new total for the sales order.

<table>
<thead>
<tr>
<th>Description</th>
<th>Subtotal</th>
<th>GST</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zinc Sustain 60 tabs</td>
<td>$17.73</td>
<td>$1.77</td>
<td>$19.50</td>
</tr>
<tr>
<td>Subtotal GST</td>
<td>$9.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td>$100.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;Short Date - 20% Off&quot;</td>
<td>$1.47</td>
<td>$0.29</td>
<td>$1.76</td>
</tr>
<tr>
<td>&quot;Short Date - 20% Off&quot;</td>
<td>$0.35</td>
<td></td>
<td>$0.35</td>
</tr>
<tr>
<td>Total GST</td>
<td>$7.31</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$80.40</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Payment Details

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Method</td>
<td></td>
</tr>
<tr>
<td>Total Paid</td>
<td>$0.00</td>
</tr>
<tr>
<td>Amount Remaining</td>
<td>$80.40</td>
</tr>
</tbody>
</table>

When you are done editing the sales order, click on "Update Order".

Review details of the sales order. You may review the details of the sales order further in the sales order page.
Over the Counter (OTC) Item Payments

If client wants to purchase or add an over the counter product:

1. Click on the client’s name on Dashboard, this takes you into appointment details screen.
2. Go to actions> create invoice.
3. Go to Products.
4. Click on Search product by name or SKU.

5. Process as normal invoice.
Prescriptions

1. Go to Client Details>Prescriptions.

8. Click the “Prescriptions” tab, this section list prescriptions for the client.

9. Locate the prescription the client wants to purchase, click on prescription number.

10. A sales order can now be created when the prescription has been approved by a supervisor.

11. To create a sales order for the prescription. Go to Actions drop down box on the upper right hand corner of screen>click “Create Sales Order”.

<table>
<thead>
<tr>
<th>Prescription #003466</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Name: John Doe</td>
</tr>
<tr>
<td>PIC: S39130</td>
</tr>
<tr>
<td>Practitioner Name: Jessica Russell</td>
</tr>
<tr>
<td>Supervisor Name: Bertrand Russell</td>
</tr>
<tr>
<td>Script Number: 003466</td>
</tr>
<tr>
<td>Status: Approved by Supervisor</td>
</tr>
<tr>
<td>Date: 23/09/16</td>
</tr>
<tr>
<td>Repeat Entitlement: 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Items</th>
<th>Orders</th>
<th>Dosage &amp; Recommendations</th>
<th>Dispensed Count</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Take 1 capsule daily.</td>
<td>0</td>
<td>$40.50</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Take 2 capsules daily: one in the morning and another in the evening.</td>
<td>0</td>
<td>$19.50</td>
</tr>
</tbody>
</table>

Total: $100.50
12. This will create a sales order prefilled with items from the prescription.

<table>
<thead>
<tr>
<th>Order Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>PIC:</td>
</tr>
<tr>
<td>Date of Birth:</td>
</tr>
<tr>
<td>Phone:</td>
</tr>
</tbody>
</table>

Add Line Items
- Products
- Treatment Packs
- Subscriptions
- Gift Vouchers

Search product by name or SKU

<table>
<thead>
<tr>
<th>Order Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

Subtotal GST: $9.13
Subtotal: $100.50
Total GST: $9.13
Total: $100.50

Payment Details
- Method
- Amount
- Total Paid: $0.00
- Amount Remaining: $100.50

13. You can edit the order if required by removing products a client doesn’t wish to purchase or adding OTC products.

14. Click "Next".

15. Process payment as normal invoice.

Note:

If scripting a product that has a discount due to short expiry you will need to create a separate script or the discount will apply to all items.
2 and 4 Pack Promotions

2 can be purchased for Acupuncture and Tui na only. 4 packs can be purchased for Naturopathy, Nutrition and Myotherapy only and must be paid for in full on the first visit.

1. When in the client file>actions>create invoice>select treatment packs>this will give a drop down menu to choose from>select 2 or 4 pack > process as normal invoice.

2. Book the other appointments whilst the client is at reception. Give the client a four pack appointment card with these dates written down.

To Process 2 or 4 Pack Payments

1. When in the client file>actions>create invoice>select use treatment credit.
2. Select “Use existing credit”.

3. Select credit drop down box>select credit to use>select use.
Printing Tax Invoices

1. Search for client > Dashboard > Clients

2. Search for client by PIC, Surname or DOB

3. File will open in Client Details screen

4. Select Client Sales tab

5. Select invoice to be printed by ID number. To print Tax Invoice. Go to Actions drop down box on the upper right hand corner of screen > click “Download Tax Invoice” opens as PDF in bottom lower screen > open > print

6. Collect printed Tax Invoice and hand to customer.
# Appointments

<table>
<thead>
<tr>
<th>Modality</th>
<th>Initial Appointment</th>
<th>Return Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Naturopathy</td>
<td>90 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Nutrition</td>
<td>90 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Homeopathy</td>
<td>90 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Remedial Massage</td>
<td>60 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>MST / Myotherapy</td>
<td>60 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Tui Na Massage</td>
<td>60 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Swedish Massage</td>
<td>60 minutes</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Acupuncture</td>
<td>60 minutes</td>
<td>60 minutes</td>
</tr>
</tbody>
</table>

## Search a Client

1. Go to Dashboard>Clients.

2. Search for client by PIC, Surname or DOB.
3. Select client when found.

![Select Client Table]

Results for Last Name "Doe" with Date of Birth 1/4/1972

- New Search

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
<th>Address</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:john.doe@email.com">john.doe@email.com</a></td>
<td>723 Derek Mill, Travonberg, New Hampshire 42548</td>
<td>Select Client →</td>
</tr>
</tbody>
</table>

or Client Not Found, Create New Client

4. File will open in Client Details screen.
**Book an Appointment**

There are two ways to book an appointment:

- From the Dashboard
- From the Client page

**Booking an Appointment from the Dashboard**

1. **Find a clinic session for the appointment.** Select the date for the appointment. Optionally, you can narrow down results to a particular discipline by selecting a discipline filter.

![Clinic Dashboard - Thursday, September 22 2016](image)

**Clinic Sessions**

- Myotherapy/MST - Thursday 8:00 to 11:00 (Myotherapy/MST (Comprehensive Treatment))
- Nutritional & Dietetic Medicine - Thursday 8:00 to 11:00 (Nutrition Consult)
- Naturopathy - Thursday 8:00 to 11:00 (Naturopathy Consult)
2. **Browse availabilities for a clinic session.** After locating a compatible clinic session for the appointment, click on the clinic session heading. The time blocks that appear in green are those that are still available for booking.

<table>
<thead>
<tr>
<th>Clinic Sessions</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Myotherapy/MST - Friday 8:00 to 11:00 (Myotherapy/MST (Seated Massage))</strong></td>
<td>16.67% Utilisation</td>
<td>Max Availability 120 mins</td>
</tr>
<tr>
<td><strong>Myotherapy/MST - Friday 8:00 to 11:00 (Myotherapy/MST (Remedial Massage))</strong></td>
<td>66.67% Utilisation</td>
<td>Max Availability 60 mins</td>
</tr>
</tbody>
</table>

**Reception:**  
**Dispensary:**  
**Clinic Supervisors:** Kaye Tribe

<table>
<thead>
<tr>
<th>Room 7</th>
<th>Room 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matthew Mulins</td>
<td>Josie Zaffina</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time</th>
<th>Ward</th>
<th>Therapist</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00 - 08:30</td>
<td>Room 7</td>
<td>Jessica Taylor</td>
<td>Available</td>
</tr>
<tr>
<td>08:30 - 09:00</td>
<td>Room 7</td>
<td>Jessica Taylor</td>
<td>Available</td>
</tr>
<tr>
<td>09:00 - 09:30</td>
<td>Room 9</td>
<td>Sarah King</td>
<td>Booked</td>
</tr>
<tr>
<td>09:00 - 09:30</td>
<td>Room 9</td>
<td>Caitlin Johnson</td>
<td>Booked</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time</th>
<th>Ward</th>
<th>Therapist</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00 - 08:30</td>
<td>Room 7</td>
<td>Myotherapy/MST (Remedial Massage)</td>
<td>Available</td>
</tr>
<tr>
<td>08:30 - 09:00</td>
<td>Room 7</td>
<td>Myotherapy/MST (Remedial Massage)</td>
<td>Available</td>
</tr>
<tr>
<td>09:00 - 09:30</td>
<td>Room 9</td>
<td>Myotherapy/MST (Remedial Massage)</td>
<td>Booked</td>
</tr>
</tbody>
</table>
3. You may check the availabilities for other rooms by clicking on the scroll buttons.

<table>
<thead>
<tr>
<th>Room 3</th>
<th>Room 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emily Martin</td>
<td>Emily Nguyen</td>
</tr>
<tr>
<td>Nutrition Consult</td>
<td>Nutrition Consult</td>
</tr>
<tr>
<td>Booked</td>
<td>Booked</td>
</tr>
</tbody>
</table>

4. Click on the available time block in which you want to book the client.

Select or Create the Client Record for the Appointment

1. Enter client’s surname in the “Last Name” field and enter their Date of Birth in the following field. These will be used to search for the record for the client, if any exists. Click on “Search Client Records”.

Book Appointment for a specific time block

Select Client

Please enter the Client’s Last Name and Date of Birth

Last Name

Doe

Date of Birth

1 / 4 / 1972

Search Client Records
2. Submitting these parameters will provide a list of all client records that match the details entered. If a record already exists for the client, click on "Select Client" and proceed to the next step. Otherwise, click on "Client Not Found, Create New Client".

![Select Client](image)

3. When selecting "Client Not Found, Create New Client" fill in the client details in the next screen. Click on "Next".

![Book Appointment for a specific time block](image)
Booking the Appointment

1. The next screen will ask for the treatment product that will be used for the appointment. Click on line to select treatment. After selecting that, review the rest of the appointment details. Click on "Next: Payment" for the next step.

2. Click on "Next: Payment" for the next step.
   If the client is not paying for the appointment at this stage, to confirm the appointment you must click on "Skip Prepayment". If you do not click this step the appointment will not be made.
Taking a Pre-Payment when Booking an Appointment

If the client will be making a prepayment to confirm the appointment don’t select skip prepayment, enter the billing details of the client and select >Process Payment. Please note that entering in the payment details on this screen does not automatically link to the EFTPOS machine. All pre-payments transactions will require both the entering of details directly into the EFTPOS machine as well as the Wellnation system.

Using the EFTPOS machine via phone

1. To complete the transaction using EFTPOS machine. Enter amount> ok >when asked to insert / tap card override by entering the credit card number> ok >enter expiry> ok > yes to approve signature> print client's copy and place in client file.

2. In Wellnation select yes to confirm appointment. Client will now have a $ sign in the diary next to their name confirming payment for that appointment.
Reschedule an Appointment

1. Go to Dashboard>select client.

2. Selecting client file name will open in Client details, select Actions tab, upper right side of screen>select Reschedule Appointment.

3. Choose date and clinic session>select available appointment.
Cancel an Appointment

There are two options to cancel an appointment: via the Dashboard or via the client's file.

Cancel an Appointment via the Dashboard

1. Go to Dashboard > select client.

2. Selecting client name will open in client file, select the Actions tab > Cancel Appointment.

3. Confirm that you want to cancel the appointment.
**Cancel an Appointment via the Clients Tab**

1. Go to Dashboard>Clients.

![Dashboard and Clients Menu]

2. Search for client by PIC, Surname or DOB.

![Client List Search]


![Select Client]

4. Screen will open in Client Details tab in client’s file.
5. Select Actions tab, upper right side of screen > select cancel appointment.

6. You will then be asked to confirm that you want to cancel the appointment.

   ![Appointment Details]
   
   **Cancel Appointment**
   
   Are you sure you want to cancel?
   
   [Yes] [Cancel]
Using the Telephones

When using the phones, be mindful that you are representing the Clinic and the College. Speak professionally and courteously, clearly and slowly.

If you are unsure about something someone is asking you, place them on hold by pressing the hold button and ask to find out, or take their number to call them back (Refer: Taking Messages section).

Answer a Telephone Call

Incoming calls are to be answered within three rings.

If you are free to answer the incoming call use the following script:
“Good morning/Afternoon Wellnation Student Clinic [location], [Your Name] speaking, how may I help you?”

If you are busy with reception clients:

If no one is available to answer the phone, excuse yourself from the client at reception “Sorry, excuse me one moment” as you must answer the phone within 3 rings. Pick up the phone and answer “Good morning/Afternoon Endeavour Wellnation ([Location] Clinic, can you hold for a moment please?)”

Place the caller on hold by pressing “Hold” and return to your reception client. If time with the reception client is extended, request assistance at reception.

To return to the caller on hold, press “Hold”.

Transfer a Telephone Call

1. Press “transfer”.
2. Dial the extension you need for your campus (Refer contact list).
3. When the phone is answered, introduce the call you are transferring through.
4. Press “Transfer” again and hang up.

Taking Messages

If you are writing down messages, record them in the reception message book provided rather than a scrap of paper. Ensure to include:

- Your name
- Date and time of call

This ensures that messages are managed in a timely manner and that follow through if necessary is actioned.

Minimum required client details are: Full name and contact number, the message details or nature of the call. If the call relates to an appointment, ring them back when not busy rather than try to make the appointment from a message you have jotted down.
SMS and Confirmation of Appointment Calls

SMS confirmations are now in place and sent 48 hours prior to the client’s clinic appointment. When a client responds with a “Yes” the diary automatically confirms the appointment changing it blue, if a client responds with a “No” the appointment is automatically cancelled, if a client ignores the SMS there is no change to the diary. As a courtesy, we give these clients a call the DAY prior to their appointment to confirm their attendance. Go into the electronic calendar in Wellnation and call each unconfirmed client, for all disciplines, for your current session time the next day.

1. The first clinic session of the day should refer to the confirmation call template and commence making confirmation calls for clients that have not confirmed their appointment.

2. Indicate on the template if the client was confirmed by ticking the box and confirm the client in the Wellnation Dashboard by changing status from Booked to Confirmed. Otherwise indicate in the communication tab and initial all entries:
   - N/A = not answering or not available.
   - LM = left message – include the time of the message.

3. A client is not confirmed unless you have spoken with them directly.

4. If a message has been left do not try to contact this client again until the last session of the day.

5. Do not confirm clients before 9.00 am or after 7.00 pm.

6. You must call at least one session worth of calls so it is not all left to the last clinic.

NOTE: Be mindful that the appointments can change during the course of the day.

The confirmation calls file is a guide only and each clinic session must be checked in the morning to make sure all appointments have been confirmed for the current day – See Point 1 of Confirmation of appointment Calls.

Confirmation Call Script

If answered directly

“Good morning / afternoon, may I please speak with [Client Name]? This is [Your Name] from Wellnation Student Clinic [Location]. I am calling to confirm your appointment for [Discipline] consult at [Time] on [Day, Date, Month].”

If unanswered and there are facilities to leave a message

“Please call the [Location] Wellnation Student Clinic on 1300 859 785 to confirm your appointment”. Leave a note in communication tab of client file to indicate you have left a message, e.g. LM on 6/1/14 @ 9.30am.
Using Medical Alert Tab

Medical Alert tab should only be used for serious ‘need to know’ health issues and allergies that the client has brought to your attention at reception.

- For example nut allergies, disability access required.
- All other information is to be put into the communication tab,
- Please initial and date all entries.

Go to client file>Medical Alert tab>Click to open>client flag/warning>enter allergy/alert>save
Printing off the Banking Session Transaction List

Ensure all appointments have the correct status at the end of your clinic.

All appointments should either appear as ‘Consult attended’ or ‘No Show’ on your screen before you proceed to reconcile the banking.

If the appointments on your screen do not appear as ‘Consult ended’ or as a ‘No Show’ and payment has been received for all of client’s consultations, change their appointment status accordingly. Select the icon on the top right, until the image is displayed, as seen below.

Key:

BOOKED > CONFIRMED > CLIENT WAITING > CONSULT IN PROGRESS > CONSULT ENDED
Daily Banking: Closing a Transaction Session

1. At the end of the session count float, place back in float bag & enter into banking. Go to clinic dashboard>side bar>banking> transaction sessions> find your session> click view> closing cash balance enter denominations for closing balance. When done change status of transaction session from “Open” to “Closed” > save.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>Cash Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-10-05</td>
<td>Closed</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session Start</th>
<th>AM/PM</th>
<th>Session End</th>
<th>AM/PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:0</td>
<td>PM</td>
<td>6:0</td>
<td>PM</td>
</tr>
</tbody>
</table>

Transaction Register: Gold Coast

Opening Cash Balance, total: $100.00
Closing Cash Balance, total: $128.00

Enter the number of coins and notes below:

<table>
<thead>
<tr>
<th>Coin</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Cent</td>
<td></td>
</tr>
<tr>
<td>10 Cent</td>
<td></td>
</tr>
<tr>
<td>20 Cent</td>
<td></td>
</tr>
<tr>
<td>50 Cent</td>
<td></td>
</tr>
<tr>
<td>1 Dollar</td>
<td></td>
</tr>
<tr>
<td>2 Dollar</td>
<td></td>
</tr>
</tbody>
</table>
2. Print the transaction entries. Go to clinic dashboard > side bar > banking > transaction sessions > find your session > click entries > opens in entry list > actions right top corner > print entries > opens as PDF in bottom lower screen > open > print.

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1923</td>
<td>14-11-2016</td>
<td>Gold Coast</td>
<td>11:30am to 02:30pm</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1913</td>
<td>11-11-2016</td>
<td>Gold Coast</td>
<td>08:00am to 11:00am</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1906</td>
<td>10-11-2016</td>
<td>Gold Coast</td>
<td>03:00pm to 06:00pm</td>
<td>$0.00</td>
<td>$38.20</td>
</tr>
</tbody>
</table>

Entry List

Add up cash. Do not include float – this should equal the cash amount on the transaction entries.

Add all EFTPOS receipts – these should equal the EFTPOS amount on the transaction entries. Staple to top left of transactions entries. It is very important that these figures match.

Ask your Clinic Supervisor to sign off the transaction entries, place with cash in banking bag.

All problems or issues with the banking are to be discussed with your supervisor. These are to be made clear to the Clinic Coordinator or Clinic Manager.
End of Clinic

- Make sure all clients are “consult ended” or “no show” in Wellnation and there is a “$” under their name (except for no shows).
- Complete the procedure for clinic banking, take out cash takings.
- Count the float and put this back in float bag. Total *check with your Supervisor for your clinic float.
- Print out “Transaction list”.
- Please place the merchant summaries (EFT receipts) with the transactions list.
- Double check the banking - Cash & EFTPOS correct, balance with the Transaction list
  **NOTE:** The total of EFT and Cash taking = the Sales total on the transaction list.
  Ask the relevant linic supervisors to sign off the banking sheet and give them the float which includes all banking paperwork e.g. The EFT Receipts, Banking sheet, Vouchers and Session Transaction list.
- Clean up desk area and leave clinic reception, waiting area and clinic rooms as you would like to find them. If any supplies are running low, please alert the Clinic Service Coordinator or Clinic Manager.
- Put away all files in alphabetical order – **Make sure all files are locked in cabinets.**
- **Log off computer – this is essential,** the next user will need to log on.
Making up Universal Client Files

 Discipline Colours
Coloured dividers are being used to distinguish between disciplines for a multi-discipline client.

<table>
<thead>
<tr>
<th>Colour</th>
<th>Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>GREEN</td>
<td>Homeopathy</td>
</tr>
<tr>
<td>YELLOW</td>
<td>Massage</td>
</tr>
<tr>
<td>PURPLE</td>
<td>Naturopathy and Nutrition</td>
</tr>
<tr>
<td>BLUE</td>
<td>MST</td>
</tr>
<tr>
<td>RED</td>
<td>Acupuncture and Tui Na</td>
</tr>
</tbody>
</table>

I.e.: SURNAME, Given name

PIC: 12345

There are special clips to hold the dividers and all client paperwork in place. Therefore all paperwork is to be punched to be kept in the folder.

Extra-large folders are available for clients whose notes require them.

Keeping Notes
On all client paperwork there is a **minimum requirement** of:

- Clients Identifications code (PIC) or Full Name
- The date, in full e.g. 06/02/14
- The Consulting Student’s name in full
FAQ’s

These FAQs should be able to help you with some inquiries, but if you’re not sure, don’t hesitate to ask for help!

Can I split my gift voucher over a few visits?
Yes, gift vouchers can be used over several visits.

Can I use my gift voucher to buy products?
Yes, gift vouchers can be used for consultations or to purchase products.

If I booked online and cancel my appointment, do I get my money back?
Endeavour do not refund cancelled appointments that were booked online. We can rebook you at your convenience into another timeslot and carry that payment over, but there are no refunds.

Is a walk in appointment free?
No, it is the standard consultation fee.

I’m a student, and I’m bringing in my friend to see me, can they get a free consultation?
No, all consultations must be paid for unless a voucher is granted from clinic management.

Are products included in the consultation fee?
Products are an extra cost on top of the consultation fee. Only homeopathy includes one remedy.

If I have a Health Care Card of a Pension Card, do I get any discounted products?
There are no discounts on products, but you can talk to student practitioner about budgeting for your price range.

Are staff of the Endeavour College and related Colleges entitled to discounted consultations and dispensary items?
Yes. All staff of Endeavour College of Natural Health, FIAFitnation and the College of Natural Beauty are currently entitled to free clinic consultations at Wellnation Clinics. These staff also receive a 15% discount on any dispensary items prescribed.

Is it possible to make my consultation shorter?
For the students’ benefits, it is necessary to use the entire time allocated.

What do I say if contacted by the media?
Inform the media you are unable to comment, but will pass their details on to a nominated representative who will contact them in a timely manner. Provide the Clinic Manager with all relevant details including media contact details and topic of enquiry. Under no circumstances should a student conduct an interview with the media.

What should I do if I can’t log on using my login details?
You are able to log on using your library sign in and password details. If not, you will be asked to go to the library to reset your password. Once it is reset, on your next login you will be asked to change your password. Please remember what you change it to. Please do not give your password or logon details out to anyone. Always log off the clinic computer at the end of your clinic session.
What should I do if I can’t print?

If you can’t print, you’ll need to set up the printer to your logon details. The instructions in setting up the printer to your logon details are at the back of the manual. Follow these instructions carefully. You will be able to print straight away once the printer is set up.

What should I do when an incident/accident happens in the clinic?

If an incident/accident should happen whilst you are in clinic, you should stay calm. Firstly see if the person is ok. Clear the area and prevent any other accidents happening. Notify your supervisor and clinic manager who will assist you with the incident. Complete an incident/accident form. Ask your supervisor to read and sign it who will pass it on to the clinic manager. All incidents/accidents are to be treated with diligence and discretion.

What should I do when I get a disgruntled/irate client?

Keep calm. Don’t try and argue with the client. Get the client to explain the situation calmly so you can understand and help them. If they won’t settle or insist on seeing someone higher up in management, then go and get your supervisor. Let your supervisor know beforehand to what is going on. What the complaint is and who the person is. Therefore the supervisor knows what to expect when they come out to talk to the client.

What should I do when the fire alarm sounds?

Keep calm. Make sure all the clients stay with clinic staff and are evacuated as per clinic policy. Collect the money and make sure it’s secure. The supervisor should be the last one out to ensure all clients are out of the building. The fire warden comes down to ensure that no-one is left in the clinic. Pass on any information to the fire warden that will help. Exit the building.

What should I do when I’m sick and I can’t make it into clinic?

As soon as you know that you are sick and won’t be able to make it to clinic / class, you will need to notify us through the Zen Desk. To do this go to the LMS > clinic hub > attendance tab. This is important because if you are in clinic and have clients, they need to be re-scheduled or re-booked with another practitioner. The more notice you give, the more chance you have in re-booking your clients and avoiding them in becoming upset and not booking you in the future.

Can I make up a session if I get sick?

You can. In order to pass your course, you need to obtain 100% attendance rate. This means that you won’t pass your course if you have called in sick throughout your course. We understand that everyone can get sick, thus a medical certificate is needed when you do become sick. When you return to college, talk to your supervisor or student services in making up your time that you have missed.

What happens if I need supplies for the clinic (i.e. stationery, paper, etc)?

If you need supplies for the clinic let your clinic receptionist know. They will be able to get the supplies for you. It would be good to let them know before you actually run out. However, stationery and other supplies should be checked daily to prevent stocks running out.

Am I allowed to treat children?

Yes. If you hold a current police check and working with children’s card. This is obtainable from the government and needs to be filled out and completed upon application of your course. Children needs to be accompanied by their parent / guardian.

Can I make appointments for other disciplines?

Yes, you can. Go to Wellnation and change the discipline. Make sure it is the correct date, day and time and book the client in. Repeat back to the client the time & date to ensure that you have the correct booking. Make notes to practitioner where necessary.

What should I do if the client’s card doesn’t work / is declined and they don’t have cash?

1. You can try another of the client’s cards.
2. You can send them to the nearest ATM machine to withdraw cash.
3. Let your supervisor know.
4. You can leave a note on their file and on the banking sheet and they can pay at their next appointment.

**What happens when the client is running late?**

Depending on how late, it might be ok with the practitioner. If the client is running more than 10 mins late, the client may need to be re-booked in with another practitioner or for another day / time. It may be that the client still wishes to see the practitioner but only for half of the normal session time. In this case, the client still needs to pay full price for the session. Advise the supervisor / practitioner of the situation. Let the client know their consult will be cut short.

**What happens if the power goes out?**

Stay calm. Make sure that all clients / staff are calm and not running around. Hopefully the power outage is only short lived, if so, clinic should be able to resume to normal. If the power outage is longer than a few minutes, please seek advice from the Supervisor / Facilities Manager in correct procedure. One procedure might be finding the nearest exit and making your way out of the building. Please check with the person in charge before negotiating any form of action.

**Can I make multiple appointments in advance for clients?**

Yes, you can. We encourage that you make appointments in advance for your client. This encourages your client to maintain their appointments and allows them to get the time / day that they would like, instead of changing their schedule and risking cancellation of future appointments.

**Do I need to book the clients appointment in with the same practitioner?**

Depending on the client's need, it might not be possible to book the client in with the same practitioner. If the client wishes to book in with the same practitioner, always endeavour to do so, but if this is not possible, recommend another practitioner. This allows the client to become more at ease with the practitioner and allows the client to maximise the benefits of the session.

**Can I accept client’s payment in advance?**

Yes. Go to appointment date> create a sales order> take payment. When you go to the dashboard you will see a “$” next to client name on the diary which indicates it has been paid.

**How much earlier should I recommend a client to arrive before their appointment?**

Recommending 10-15 mins is a good idea. This allows the client to find the college, find a car park and make their way to the clinic. This will also allow time for the client to fill out the necessary forms, if the client hasn’t already. When booking new clients in, repeat to them the address of the college to ensure they know where it is located. Be aware of parking restrictions.

**Can I give discount to family & friends?**

Usually no. There are set prices for treatments / products. If there is any change for pricing, this must be approved prior by the Associate Director – Clinical Services (i.e. such as promos - see ‘promos’ for more information, question #15). If for any reason, a discount is to be considered for your family & friends (e.g. if it’s a specialised / interesting case), this should be discussed prior to booking the appointment with your supervisor and approved by the Clinic Manager. The final price will be set by the Clinic Manager.

**Can I recommend a practitioner outside of the college should it be necessary?**

This is at the discretion of your supervisor / Clinic Manager. If we can't help them here at the college, it might be necessary to refer them onto another practitioner outside of the college. If this is the case, talking to your supervisor and Clinic Manager is recommended and the Privacy Policy should be adhered to at all times.