Admin Staff Training Checklist

Print the Admin Staff Training checklist and use it to mark the tutorials you have viewed and completed.

You can pause the videos at any point, as well as drag the curser for the video backwards to review the video or drag it forwards to view a specific point in the video.

Note: *The total duration of the video tutorials for each section is shown in minutes to assist you with fitting the training in with your daily activities.*

☐ Setting Up Your Organisation (12:00 mins)

- ☐ How to Create a New Clinician.
- ☐ How to Create an Appointment Schedule.
- ☐ How to Create a Clinician Appointment.
- ☐ How to Create a Quick Appointment.
- ☐ How to Edit an Appointment and Add Charges.
- ☐ How to Create a Podiatry Appointment.
- ☐ How to Create a New Membership Type.
- ☐ How to Create Client Notes on a Class.
- ☐ How to Create a New Weekly Class.
- ☐ How to Setup SMS Messaging.
- ☐ How to Create a Patient Goal.
- ☐ How to Create an Exam Test Type.

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☐ Back Office Tasks (8:00 mins)

- ☐ How to Customise Graphics.
- ☐ How to Create a Letter Template.
- ☐ How to Create Daily Takings
- ☐ How to Create a Banking.
- ☐ Using Email and SMS Messaging.
- ☐ How to Upload Files.

☐ Managing Billing (11:00 mins)

- ☐ Client Payments
- ☐ How to Create a Client Invoice.
- ☐ How to Create a Client Statement
- ☐ How to Create a New Debtor.
- ☐ How to Create a Custom Debtor Invoice.
- ☐ Invoicing a Debtor From an Appointment.
- ☐ How to Record a Debtor Invoice Payment.
- ☐ How to Send an ACC45 to ACC.
- ☐ How to Create and Send a Schedule to ACC.