The Client-Ready Practice Checklist

Six checks before your fall caseload fills up.

Before your calendar tightens, run through these six checks to see how much of your practice runs on systems, and how much runs on you.

Every box you can tick is one less thing you are holding together with manual work.

☐ Can you get up to speed on any client without going hunting?

One client record holds notes, sessions, contact and clinical details, documents, forms, measures, insurance, and secure messages.

- ***Gut check:*** *With five minutes before a session, could you find everything without a second login?*

☐ Does your system know who else is part of each client's care?

A parent books, someone else pays, a physician stays in the loop. Owl Practice's Circle of Care keeps those people tied to the record, so the system holds the connections for you.

- ***Gut check:*** *How many scheduling messages would leave your inbox if clients booked the routine ones?*

☐ Can clients book their own routine appointments?

With Owl Practice's Online Booking, clients pick from the availability and services you make visible, whenever it suits them.

- ***Gut check:*** *How many scheduling messages would leave your inbox if clients booked the routine ones?*

☐ Can confirmations and reminders run without you?

Owl Practice confirms bookings and changes automatically, then reminds clients by email, SMS, or both. Reminders can route to the right person in a client's Circle of Care.

- ***Gut check:*** *If your caseload jumped next month, would your admin jump with it?*

☐ Does the small stuff stay out of your inbox?

Booking, forms, information, messaging. Owl Practice's Client Portal gives clients one secure place for all of it, so your time goes to the work that needs you in the room.

- ***Gut check:*** *What are clients emailing you now that they could do themselves?*

☐ Does between-session communication have a boundary?

Owl Practice's Secure Messaging gives client messages a dedicated home in the Client Portal, where you set expectations for use and reply times.

- ***Gut check:*** *Do your clients know where practice communication belongs?*

Ticked every box? Your practice is client-ready.

Missing a few? See how Owl Practice brings records, scheduling, and communication into one place.

Read the full resource

Get Your Practice Client-Ready for Fall: A Back-to-School Checklist for Therapists