**Daily Support Team Tasks Checklist**

**Always initial tasks completed on Halaxy file e.g. “Notes” or if completed on Asana.**

* Check weather & send out weather SMS if needed
* Check Admin emails for any priority tasks including uploading NCF’s, cancellations/rescheduling or client enquires
* Process previous days sessions on Halaxy or your choice of CRM
* When processing sessions, check for any reporting needs and remind therapist if needed
* Send out referral acceptance emails/letters to Referrers if it’s the client’s first session
* Send out no show or late cancellation email if required
* Check all tabs in Asana for tasks to complete such as following up outstanding payments, referrer follow up calls/emails etc)
* Go back and check previous payments on Halaxy to make sure they have all been processed
* Email out customer satisfaction survey to clients who have attended x amount of sessions

**Daily Task Procedures**

**No show/late cancellation emails**

1. If an existing client doesn’t show to their appointment we have a 3 strike policy in addition to the no show fee where if they no show 3 times we will no longer \_\_\_\_\_\_\_\_\_\_\_\_\_ e.g. offer them Medicare sessions and they will be required to pay privately for their sessions. Template emails under e.g. "COMMUNICATION"
2. If it is a **new** client and they don’t show or cancel late for their first appointment we email them the "Missed first appointment" email which is also under ""COMMUNICATION". This gives them 1 reminder of our policy and lets them know we will waive the no show fee just this once.

**Asana tasks-Client follow up calls**

1. When a client either calls or emails through to make an enquiry and indicates they may like an appointment with us but they don’t book in at the time of the call, we make a follow up phone call to see if we can help further and if they would like to go ahead with booking an appointment at a later date. We note all of this on Asana under the e.g. client calls to follow up" tab.

**Follow up with Referrers regarding documents we have received**

1. Sometimes a referrer will fax or email through a client’s referral prior to the client booking a session with us. We create a file on Halaxy/Asana for the client and upload their details and information received. Make a note under the e.g. "Received Referral” tab in Asana for future reference. If the client doesn’t book in after **1 week** we attempt to get in touch to see if they would like an appointment.
2. If we are **unsuccessful** in contacting the client, we send a fax/email to the referrer notifying them we received the referral and have attempted to get in touch with the client to book them in but have had no luck.
3. If we are **successful** in contacting the client we send a fax/email to the referrer advising them of the positive outcome

**Once daily administrative tasks have been completed please proceed to work on the following projects:**

1. Referrers check in (e.g. see “REFERRERS CHECK IN” for further instructions)
2. Content Sourcing (e.g. see "CONTENT SOURCING" for further instructions)