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CHECKLIST FOR MEDICAL AND ALLIED HEALTH PRACTICES

Ten things your practice can automate this year.

All ten run alongside the systems practices already use, such as Best Practice, MedicalDirector or Cliniko, and your accounts software. Tick the ones that take your front desk's time, then start with one.

- [ ] **01** **Appointment reminders and confirmations** — Fewer no-shows
  Texts before each appointment, with replies to confirm or cancel handled automatically.
- [ ] **02** **New patient intake** — Faster check-in
  Forms completed online before the visit, so details are not retyped at the desk.
- [ ] **03** **Recalls and reminders** — Nobody falls through
  Patients due for follow-up reminded on time, with outcomes recorded.
- [ ] **04** **Inbound referrals and correspondence** — Less inbox time
  Letters and referrals sorted and filed to the right patient for a person to check.
- [ ] **05** **Claiming and rejected claims** — Money in sooner
  Rejected claims flagged with the reason so they are fixed and resubmitted quickly.
- [ ] **06** **Phone overflow and after-hours enquiries** — No missed calls
  Routine questions and booking requests captured when the phones are busy or closed.
- [ ] **07** **Results and letters to patients** — Clinician approves
  Routine, clinician-approved messages sent through the right channel.
- [ ] **08** **Supplier invoices, rosters and the accounts** — Back office time back
  Invoices read and queued for approval, rosters and timesheets kept in step.
- [ ] **09** **Compliance records** — Always up to date
  Registrations, insurances, training and equipment checks tracked with reminders.
- [ ] **10** **The Monday report** — The numbers in one place
  Appointments, utilisation, no-shows, recalls due and overdue accounts on one page.

Where to start

Pick whichever of reminders or new patient intake takes more front desk time. Run it alongside the old way for a fortnight, then add recalls and claiming.

What stays with a clinician

Anything clinical: triage, advice, interpreting results and prescribing, and any conversation with a distressed patient.

Full guide: high10.com.au/blog/ai-automation-for-medical-practices
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