
THE RECEPTIONIST ROLE AT NMK



POSITION PURPOSE

You are responsible for administration, reception tasks and assisting the Clinic Manager with day to day activities.

You manage the administrative roles that maximise the results achievable by the other members of the company, by effectively, efficiently and cheerfully making the patient's transition through No More Knots as outstanding as possible.

You simultaneously cater to the needs of the Massage Therapists and Clinic Managers' on a day to day basis. With the flexibility to handle both the most challenging and most simple tasks extremely well.

You are the first point of contact for any New Patient, and always naturally exude warmth and vitality and most everything that we value as a team and company.

GENERAL OBLIGATIONS

In addition to your specific duties, you are required to always act in the Company's best interest and to refrain from acting or being seen to act in conflict with those interests. You must use your best endeavours to protect and promote the Company's reputation and to perform the duties assigned to you from time to time to the best of your abilities and knowledge.

PRINCIPLE ACCOUNTABILITIES

A Receptionist is responsible for implementing No More Knots' policies and procedures. Principal accountabilities include, but are not limited to:

Patients:

1. Greet anyone through the doors of No More Knots with a smile and a helpful attitude.
2. Establish friendly rapport with patients.
3. Responsible for the comfort and outstanding service of the patient from the time they enter our property to the time that they leave with the exception of when they are with the therapist during consultation.
4. Carefully follow procedures for therapist notification of patient arrival and general care whilst attending the clinic.
5. Respond to therapist requests throughout the day.
6. Handle all inbound and outbound phone calls and emails in the appropriate manner that encompasses our team values.

Clinic Environment:

1. Ensure cubicle presentation is kept neat and tidy throughout the day.
2. Ensure all areas of the clinic including staff rooms, bathrooms, reception areas and other treatment rooms are clean and sanitised.

Daily Office Duties:

1. Answering the phone and handling customer enquiries
2. Warmly greeting clients on arrival at the clinic
3. Accurately making appointments for clients with all therapists
4. Processing payments for appointments
5. Collect mail
6. Banking/Till Reconciliation
7. Ordering Stock
8. Completing set tasks by Clinic Manager or Therapists
9. Ensuring the clinic is clean and presentable
10. Email liaising with inbound and outbound queries from internal and external customers

You will be required to be flexible in this position and must be prepared to undertake such other administrative, clerical or management tasks as may be assigned to you by the Company from time to time. Such work may be outside the area of your normal duties but not outside the scope of your skills and abilities.

Apart from the specific matters noted above, you are required to apply yourself to the position in a professional and responsible fashion at all times and to attend to all associated administrative responsibilities that arise from time to time in relation to the position.

COMMUNICATION WITH THE TEAM



START TIME

Deputy is the online scheduling program that we use to manage all reception shifts across each clinic. You are expected to commit to your availability and your assigned shifts. You are expected to be on time for every shift. Ensure sufficient time to prepare, conduct a hand over with your team mate, and commence work at the correct time in a stress-free way. If you are expected to be late, you must contact your manager to advise.

EMAILS

Due to the nature of the business, there may not be opportunity for a manager to pass on important communication to you in person. Therefore, No More Knots relies heavily on email for important communication to and from receptionists; for example, regarding availability and timesheets. It is essential that all No More Knots receptionists have a personal email account which is checked frequently.

It is expected that receptionists will respond to all emails sent by No More Knots within **48 hours** of receiving them (***with the exception of weekends or during periods of annual leave***).

Each clinic has a direct email accessible to reception. It is your responsibility on a shift to be managing the ingoing and outgoing messages in this inbox. All communication from management relating to a task to be completed will be directed to these emails. It is your responsibility to check and follow up on all tasks relating to your shift or you specifically.

PERSONAL FOLDERS

Each receptionist will be set up with an Outlook Folder. Your Outlook folder is to be used only to store individual work related items. For example, if your manager has emailed you to request a task be completed or you would like to keep a copy of the wording of an email as a template, these things may be stored in your NMK Outlook folder.

It is your responsibility to check these folders for new messages at the start of each shift as other receptionists may move an email that is specifically for you to your personal folder. Under no circumstances should client related emails be kept in your personal Outlook folder.

WHAT'S APP GROUP

There is a No More Knots What's App group chat created for team communication, such as in regards to rosters and shift changes. Managers will regularly post in this group so its a good idea to make sure you are apart of it.

COMPUTERS

No More Knots has multiple computers that are easily accessible to the team, and some of which are specific computers designed for reception use only. Under no circumstances are the reception computers to be used by therapists, even if they are unoccupied.

You must not use any computer owned or provided by the Company, for any purpose other than to carry out your duties. You must not use any disks or other computer media which are not the Company's property and you must not undertake any private or other activity by using such disks on any the Company equipment. One purpose of this requirement is to ensure that no viruses are introduced into the Company's systems. Another is to ensure that the Company is not involved in any breach of copyright or other similar legal right which belongs to someone else.

PHONES

No More Knots has multiple handsets for managing incoming and outgoing calls to the clinic.

The clinic phone should be used for all work related calls only. If a client needs to make a local phone call from our land line, it is at no charge.

You are not permitted to be on or use personal phones or other devices during work time, unless specifically required and have manager approval. Phones are to be kept on silent and with your belongings in the designated areas so as not to cause disruption. You are free to access your devices while on a rest or meal break provided you are away from the main desk and in the designated break areas.

These policies are in place to maintain professional standards in the reception area.

UNIFORM

You are the first point of contact for clients at NMK. For this reason, it is important we make a great first impression for our clients as soon as they enter the clinic. One of the many ways this can be achieved is through our presentation. It is expected that you arrive to work looking well put together and in the correct uniform.

SHIRT: No More Knots provides each receptionist with a black polo shirt that must be worn every shift. If you loose your shirt or it needs replacing you will be responsible for purchasing one directly through Head Office. The cost of the uniform shirt is **\$35**

No More Knots also provides you with a name badge which is expected to be worn pinned to the polo for each shift.

BOTTOMS: You are able to wear any bottoms as long as they are black, and work appropriate. These can be black dress pants, a black skirt, leggings or black shorts (they must be tailored and knee length).

SHOES: Shoes must also be black and closed in. Open toe shoes are not appropriate. Ballet flats, or black runners can be worn depending on the rest of the uniform choice.

WINTER: During the colder months, a black cardigan or black blazer may be worn over the NMK polo shirt. Sports jackets/jumpers are not permitted nor are jumpers/jackets that are not black.

ACCESSORIES/HAIR: The option of nail polish, jewellery and makeup is entirely up to you. Hair can be styled however you wish, as long as it looks neat and presentable.

THE RECEPTION TEAM IS
THE FIRST POINT OF
CONTACT FOR CLIENTS
WITHIN THE CLINIC.

WE ASK THAT YOU ARRIVE
FOR WORK LOOKING, NEAT,
TIDY AND PROFESSIONAL.



PROFESSIONALISM

ATTITUDE

Always strive to be the best version of yourself, and put your best foot forward every day!

We need to be bright, warm and friendly with everyone, team members and clients alike. We all have bad days but you are responsible for leaving negative thoughts and attitude at the door and putting on a strong face in the work place. Your mood will affect others around you and your performance in your role. Think and reflect on the energy you are bringing with you into work, and how you are presenting to the world. Remember, you are the face of our business!

PERSONAL BELONGINGS

Personal belongings of all staff and contractors are to be kept out of public view and in the tea room or other designated areas. If possible valuable items or large amounts of money should not be brought into work. No More Knots ownership or management is not responsible for any personal valuables that are brought on to the premises.

CONVERSATION

Maintaining a reputation as being a professional is dependent upon behaviour and actions, including when dealing with other teams members, management, therapists and clients. Levels and topics of conversation must stay appropriate to the workplace environment. Negative language of any sort, or conversations that in any way denigrate the company or any other No More Knots employee or subcontractor are strictly forbidden. Any issues that arise regarding any aspect of the workplace must be raised through the appropriate channels as soon as is practicable.

PAYS, ROSTERS AND TIMEOFF REQUESTS

ROSTERS

Rosters are set for the month ahead in advance. If you have any queries or concerns about the roster you must contact management immediately. You are responsible for sending in accurate availability by the due date when requested by the manager.

PAYS

Pays are processed fortnightly on Thursdays. Your pay is calculated based on your rostered hours in Deputy. On the Wednesday prior to payday, you will receive a draft timesheet to review and confirm that the hours recorded in Deputy accurately reflect the hours you worked during the pay period. It is your responsibility to notify your manager of any shift changes and ensure these updates are correctly reflected in Deputy.

TIMEOFF REQUESTS

Any time off requests or unavailability need to be entered into deputy and an email sent to management. It is preferred that we receive any requests in advance to ensure it doesn't disrupt rosters and scheduling for fellow administration staff. If the roster has already been published and your availability changes, it is expected that you will help find a solution for your allocated shifts. You must always notify management of any changes as soon as possible.

SICK LEAVE

If you are unwell and feel you will be unable to attend a shift, you must call and advise management as soon as possible. It is also appreciated that you assist in attempting to cover your shift by reaching out to the rest of the team via the group What's App. Ideally you are giving as much notice as you can if you feel like you may be unable to work an upcoming shift so there is time to make alternative arrangements. We understand that illness can strike unexpectedly, but do not wait until the last minute to advise you are unable to work.

TIMESHEETS

The standard pay cycle runs Thursday through to Wednesday, and everyone is paid on a fortnightly basis on the Thursday.

DEPUTY

Our rostering program, Deputy, is responsible for setting out everyone's shifts. It is the program that our PAYROLL Team will use to calculate your pay. You should regularly be checking your shifts on the Deputy app and notifying your manager of any changes immediately.

Changes to shifts include:

Starting or arriving late

Finishing a shift early

Finishing a shift late ***If you are required to stay back on a shift you should be notifying your manager at that time***

Taking a 30min break (if entitled to)

IF YOU ARE CASUAL: As a casual employee, you are not entitled to annual leave and therefore do not need to submit leave requests through Deputy or Xero. However, if you are planning a holiday or anticipate needing an extended period off (e.g. university exams), we kindly ask that you notify Management as early as possible to assist with roster planning and forecasting.

IF YOU ARE PART-TIME OR FULL-TIME: Firstly, you must gain approval for your requested leave from your immediate Manager. Once approved, add this leave into Deputy. You will also need to submit a leave request through Xero.

APPROVAL FOR LEAVE THROUGH XERO: Please ensure you select the person who handles rostering as the approver (currently Natasha June 2025)

SUBMITTING A REQUEST FOR TIMEOFF

It is important that you consider any time that you wish to take off well in advance so we have enough notice to be able to coordinate the remaining roster to cover your absence. All timeoff requests for the month should be submitted at the very latest when that round of availability is due.

EMAIL YOUR REQUEST THROUGH

You must submit your request for time-off in writing to your manager. They may wish to arrange a time to chat to discuss the request or confirm with you via email. It is important that you submit your request well in advance. While we encourage everyone enjoying a holiday or time away, we are unable to accommodate multiple requests for time-off at the same time. If we do not have enough availability from the administration team we will be unable to support the demands of the business. This is particularly important to consider during peak holiday seasons like Easter or Christmas.

FOR PART-TIME AND FULL-TIME EMPLOYEES: Your leave request must be approved in writing. Please ensure you follow-up and discuss your leave requests with a manager before booking time off.

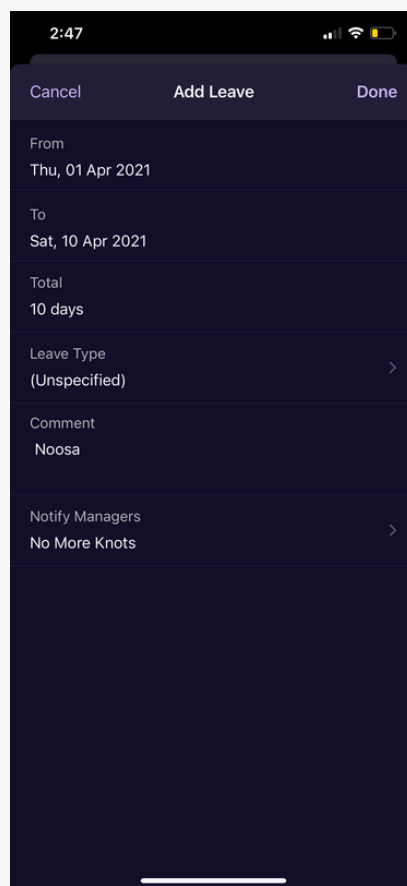
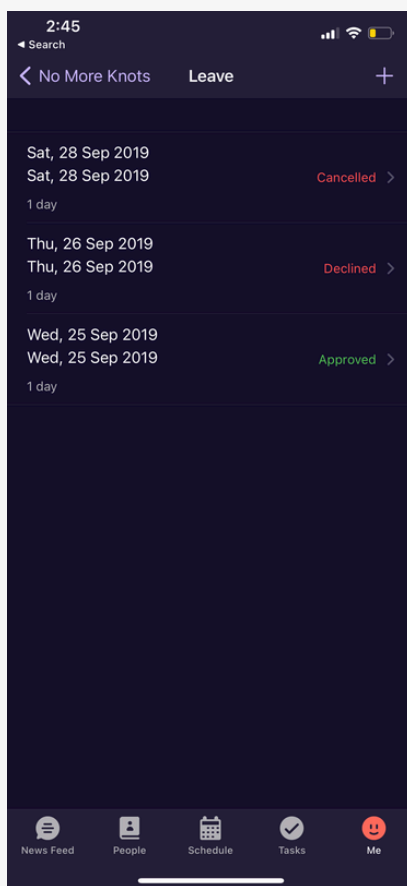
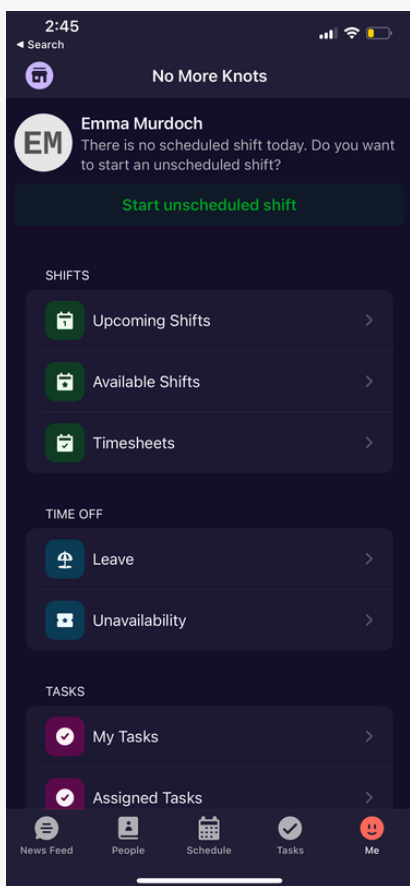
SUBMIT YOUR REQUEST THROUGH DEPUTY

Once you have emailed through your request you will need to submit a leave request through our scheduling app; Deputy.

We do this so we will be alerted when creating rosters of any conflicts with scheduling and unavailability. It makes creating the next month of rosters a much smoother process.

USING THE APP

To submit a leave request through Deputy, open up the app on your phone.



1. Go to the home page, and select '**Leave**'.
2. Here you will be able to view a record of any leave requests that you have made. Click the '+' sign in the top right-hand corner to add a new one.
3. Enter the date range for your leave and reason for the request in the '**comments**' section. Make sure that the '**Leave Type**' is set to (**Unspecified**). Then select 'Done' in the top right-hand corner when you are finished.

BREAKS

Under the Health Professionals and Support Services Award [MA000027], depending on the length of your shift, workers are entitled to a rest and or meal break.

A **rest break** is a 10 minute paid break that counts as time worked.

A **meal break** is a 30 - 60 minute unpaid break that doesn't count as time worked.

An employee gets the following number of breaks, depending on the hours they work.

NUMBER OF HOURS WORKED	REST BREAKS	MEAL BREAKS
LESS THAN 4 HOURS	0	0
4 - 5 HOURS	1	0
5 - 8 HOURS	1	1
8+ HOURS	2	1

When taking a break, you are expected to:

1. Look at the diary and determine when it is appropriate to step away from the desk. As we have treatments running all throughout the day there are not always set break times in the schedule. Alternate with your team mate if there are two of you working together on a shift, or discuss with the manager on duty to help out if needed.
2. Notify your team mates and manager on duty if you are stepping away to have a break.
3. If you are by yourself in clinic, ask a manager to divert the phones to another clinic for you, or put the phones on DND if this is not possible.
4. If you are due a 'Meal break' and you must make sure that it is recorded and included on your timesheet.

Information on this page is taken directly from the Fair Work Ombudsman (<https://www.fairwork.gov.au/>)

10 RULES FOR GREAT CUSTOMER SERVICE

IN YOUR DEALINGS WITH CUSTOMERS, BE THE ONE TO INITIATE HONEST, RESPECTFUL AND THOUGHTFUL COMMUNICATION. BECAUSE TO THEM, YOU NOT ONLY REPRESENT NO MORE KNOTS....

YOU ARE NO MORE KNOTS!



1. COMMIT TO QUALITY SERVICE

Create a positive experience for our customers and go above and beyond customer expectations.

2. KNOW YOUR PRODUCTS

This helps win our customer's trust and confidence.

3. KNOW YOUR CUSTOMERS

Tailor your service approach to their needs and personality.

4. TREAT PEOPLE WITH COURTESY

Every contact with a customer leaves an impression. Use phrases like “Welcome to No More Knots”, “Thank you for your patience”, “You’re welcome”, “Lovely to meet you”, “Have a great day”, “We look forward to seeing you again soon”

5. NEVER ARGUE WITH A CUSTOMER

Be solution focused rather than problem focused!

6. DON'T LEAVE CUSTOMERS HANGING

All communication with a customer needs to be handled with a sense of urgency

7. ALWAYS PROVIDE WHAT YOU PROMISED

Failure to do this is a sure way to lose credibility with our customers. If you can't make good on your promise, apologise and offer something in return

8. FOCUS ON MAKING CUSTOMERS, NOT SALES

Focus on the quality of your interactions with customers

9. ASSUME THAT CUSTOMERS ARE TELLING THE TRUTH

The majority of customers don't like to complain; in fact, they will go out of their way to avoid it

10 MAKE IT EASY TO BUY

Make the process, simple, fast, efficient and user-friendly

APPOINTMENT REMINDER CALLS

Confirmation calls are made daily for the next day's appointments which have not already been confirmed. Ideally, at the start of every day we would like to see that the full schedule has been confirmed so we can safely assume everyone's attendance.

WHEN TO MAKE THE REMINDER CALLS

Reminder calls should be made any time between the hours of **10am - 12pm**. All clients who have booked in advance should have received at least one version of our confirmation message already. These messages are automatically sent out by MINDBODY to the clients 2 days prior to their appointment, and could be via text or email depending on what they have opted to receive. You can view a client's subscription choice in the CLIENT INFO. section of their profile.

Reminder calls are to chase confirmation from clients who have not responded to these automated messages.

DECIDING WHO NEEDS A REMINDER CALL

Look at the next day's diary and select to show the **status mode** of the appointments.

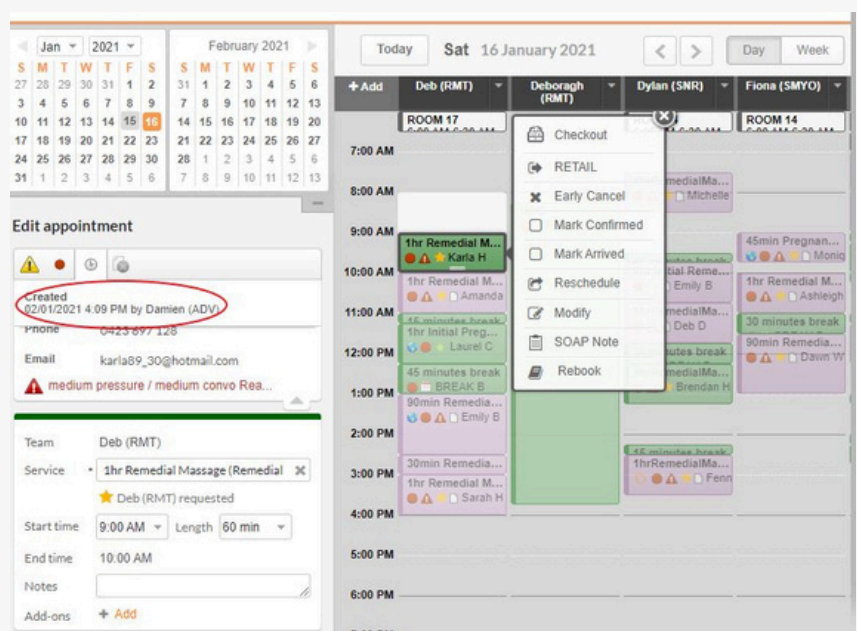
Any appointment that is unconfirmed AND created before the present date will need to be called.

For example: *It is Friday the 15th of Jan and you are making confirmation calls for Saturday the 16th. If you found an unconfirmed appointment that was created/booked on Friday the 15th, we would NOT need to call that client. If it was created at any earlier date and still not confirmed they will need to be contacted.*

Click on any appointment that is **green** to bring up the action menu. Look over at the left hand side of the screen to where you should be able to view the client and appointment details.

Underneath 'Edit appointment' there is a row of four icons. Hover over the one that looks like a clock. This shows us the details of when the appointment was first created, and when it was last edited.

If the note shows that the appointment was created prior to the present date we will need to follow up with the client.



WHO DON'T WE NEED TO CONTACT TO CONFIRM?

If an appointment appears 'light purple' in the status screen and there are no notes regarding an confirmation calls that have been made then it is likely this appointment has been 'pre-confirmed' by the client via them responding correctly to one of the system confirmation messages. You could also check who last modified the appointment and/or search for their number in Messenger AI to confirm this. Provided they do not need to be contacted for any other reason (HF issues, appointment timing, ect.) we can make a note on the appointment:

NNTC - PRECONFIRMED - YOUR INTIALS

If an appointment has been booked within 24hrs (*for example, the appointment was booked on Friday 15th for Saturday 16th*) and there is no other reason that we need to contact them, we can automatically mark the appointment as confirmed. We would write a note on the appointment:

NNTC - booked DATE - YOUR INITIALS

WHO DON'T WE NEED TO CALL TO CONFIRM?

If an appointment has been booked the day before for the next day (*for example, the appointment was booked on Thursday 14th for Saturday 16th*) then we DO need to confirm with them directly, but we can skip the phone call. In these cases, just send the first confirm text directly to the client (**see template for this**). This is because our system automated messages go out 2-days prior, and so the booking in this instance has only just missed out on getting that message. We would write a note on the appointment:

Sent 1st confirm txt DATE - YOUR INITIALS

In this instance, follow up with the remainder of the confirmation process as required.

CONFIRM CALL SCRIPTING

When reminding a client of their appointment and confirming their attendance, it is important to make sure that we clearly recite all details of the appointment to them.

This includes:

- Date
- Clinic location
- Time of the appointment
- Therapists name

If the client answers the phone call...

*Hi **(Client's Name)**, this is **(Your Name)** calling from No More Knots **(Clinic Location)**. How are you today?*

.....

*I am just calling to confirm your appointment for tomorrow **(Day and Date)**. We have you booked in for a **(Type and Length of Appointment)** at our **(Clinic Location)** with **(Therapist's Name)** at **(Appointment Time)**. Will you still be attending?*

When they answer positively...

*"That's great! Thank you very much for confirming, we look forward to seeing you tomorrow, **(client's name)**."*

If the client responds negatively and needs to cancel...

"I'm sorry to hear that. I can cancel that one for you now. Would you like to reschedule with me now over the phone?"

If you have to leave a voice message...

*"Hi **(Client's Name)**, this is **(Your Name)** calling from No More Knots **(Clinic Location)**."*

*I am just calling to confirm your appointment for tomorrow **(Day and Date)**. We have you booked in for a **(Type and Length of Appointment)** at our **(Clinic Location)** with **(Therapist's Name)** at **(Appointment Time)**. If you could please give us a call back on **(Clinic Number)** to confirm your attendance that would be greatly appreciated.*

Thank you. "

***Sometimes a client will have a restriction on their voicemail, requiring all messages left to be only 10seconds in length. If this occurs please say...**

*"Please call No More Knots on **(Clinic Number)** to confirm your appointment for tomorrow. Thank you"*

ALWAYS FOLLOW UP VOICEMAILS UP WITH AN SMS

SMS FOLLOW UP

After leaving the voicemail, use Messenger AI to send the following text:

SCRIPTING FOR 1st SMS

*Hi **(Client Name)**,*

*Please call No More Knots **(CLINIC NAME)** on **(Clinic Number)** to confirm your **(TIME)** appointment for tomorrow with **(Therapist's Name)**. You can also reply to this text message with "C" to confirm!*

*Kind regards,
NMK Reception*

If the client responds to your message via AI:

Thank you so much for confirming. We look forward to seeing you in the clinic!

ROUND 2 OF CONFIRMATIONS (EOD)

During the PRE-CLOSE phase of the day (usually between 4-5pm, depending on the close time for the evening), we will need to attempt to contact the client again if they have still not confirmed their appointment.

Send another message using Messenger AI for anyone who still has not contacted us regarding their appointment. This is especially important for anyone with a history of MALCs.

SCRIPTING FOR 2ND SMS:

*Please call No More Knots **(CLINIC NAME)** on **(Clinic Number)** to confirm your appointment for tomorrow. If you contact us outside of business hours, please be sure to leave a message. Any no-shows or cancellations within 4 business hours will incur a fee.*

*Kind regards,
NMK Reception*

CONTACTING UNCONFIRMED CLIENTS THE MORNING OF

If a client fails to contact us regarding their appointment (including voicemails) we will need to attempt to reach them once more. Therapist's understandably become nervous of clients (particularly with a history) who are unconfirmed, and if they have people on the cancellation list requesting to see them. Send another message the morning of.

SCRIPTING FOR 3RD SMS (FINAL FOLLOW UP):

*Please call No More Knots directly on **(Clinic Number)** to confirm your appointment for today. If you know that you are unable to attend it is important that you call as soon as possible to reschedule. Any no-shows or cancellations within 4 business hours notice will incur a fee.*

CONFIRMATION CALLS - SATURDAYS ONLY

Saturday confirmation calls will work slightly differently as we have a shorter business hours on the weekend, and are currently closed on Sundays. On Saturday we will try to confirm as many of the appointments for Monday that we can, but do not need to do all of the standard confirm call messages that we normally would as our Monday clients will only be receiving the system automated messages that morning!

On Saturdays, make our reminder calls between **12pm - 1pm** for those that need it. They should have received the automated message around 9am that morning, and so have now had a couple hours to respond to it. For those that haven't and are still unconfirmed. call as normal and leave a message on voicemail if required. **DO NOT FOLLOW UP WITH THE FIRST SMS TEMPLATE.**

Instead, use your voicemail to encourage them to respond the automated message. When they do, the bot will be able to confirm this automatically for us.

Around 2pm send an EOD confirm message to follow up anyone we are still waiting on. This will be slightly different to the one sent Monday - Friday as we are closed Sundays.

SCRIPTING FOR 2ND SMS (SATURDAYS):

*Please call No More Knots **(CLINIC NAME)** on **(Clinic Number)** to confirm your appointment for Monday. Our clinics are closed on Sundays, so if you contact us outside business hours, please leave a message. Any no-shows or cancellations within 4 business hours will incur a fee.*

*Kind regards,
NMK Reception*

Unconfirmed appointments will need to be followed up as normal Monday morning with our day-of message.

WHY DO WE CONFIRM APPOINTMENTS?

It is important that we confirm all appointments so we can be assured as much as possible that the clients will be attending. Any unconfirmed appointments carry a higher risk of that client cancelling last minute, or not showing up to the clinic. These become opportunities for our other clients, our therapist team, and the business as a whole.

*In the instance that a client calls back, annoyed with the amount of contact we made:

We can understand that you may be frustrated by this; however, this is the policy that we follow to ensure that we can confirm attendance from all our clients, or have plenty of notice to reschedule their appointment.

I can see that you receive the original confirmation text message/or email on (DATE) for this appointment. These are sent out 2 days prior to your appointment automatically from our system. If you follow the prompt and reply with a 'C' it will confirm your appointment directly in our system and we won't need to follow up with you at all.

If the client has not opted to receive our text message it is a good idea to encourage them to

CONFIRMATION NOTES - QUICK GUIDE

NNTC - pre-confirmed - INITIALS

Meaning = 'No Need To Call - Pre-confirmed'

This is used when we do not need to make a confirmation call to the client, as they have confirmed their own appointment via one of the system automated messages (either SMS or email).

NNTC - booked DATE - INITIALS

Meaning = 'No Need To Call - booked today'

This is used when we do not need to make a confirmation call to the client, as they have booked the appointment today for tomorrow (appointments booked within a 24hr window). This can be used for both appointments booked manually over the phone or online by the client.

For example: Today is Friday 10th May and you are confirming appointments for Saturday 11th. Appointments booked on the 10th may for tomorrow will be confirmed with this note.

Sent 1st confirm txt DATE - INITIALS

Meaning = 'Manually sent the first confirm text message'

This is used when the client has just booked outside the 24hr window so we aren't assuming confirmation, but has booked too soon to have received the automated system confirmation message. We only need to call to chase if a client has ignored our first attempt via text/email.

For example: Today is Friday 10th May and you are confirming appointments for Saturday 11th. Appointments booked on Thursday 9th may for tomorrow will need to be manually sent a confirm message.

Called & confirmed @ TIME & DATE - INITIALS

Meaning = 'Called and confirmed with the client over the phone'

This is used when we have reached the client directly over the phone and verbally confirmed their appointment.

LMOVM & sent txt re. confirm @ TIME & DATE - INITIALS

Meaning = 'Left message on voice mail and follow up text sent regarding confirming appointment'

This is used when we have reached out to the client and only been able to leave a voicemail. We always send a follow up text as well in order to prompt a quicker response in case they have not answered because they don't recognise our number.

ALWAYS SIGN OFF ANY NOTE YOU MAKE WITH YOUR INITIALS

EOD confirm txt sent @ TIME & DATE - INITIALS

Meaning = 'End of day confirm follow up text sent'

This is used when have still not heard back from the client and were required to send the second follow up message of the day (refer to text templates).

This note will go above the previous confirmation note in the appointment notes so it reads in order of last effort made to first effort made.

Final confirm txt sent @ TIME & DATE - INITIALS

Meaning = 'Final confirm text sent '

This is used when have still not heard back from the client and were required to send the third /final follow up message the next morning/morning of the appointment. (refer to text templates).

This note will go above the previous confirmation note in the appointment notes so it reads in order of last effort made to first effort made.

Cl. called to confirm @ TIME & DATE - INITIALS

Meaning = 'Client called back and confirmed appointment '

This is used when the client calls back after receiving one of our efforts to contact them and confirm their appointment verbally with us over the phone.

This note will go above the previous confirmation note in the appointment notes so it reads in order of last effort made to first effort made.

Cl. confirmed via bot - INITIALS

Meaning = 'Client confirmed via the bot '

This is used when the client responds to our messages via the AI system and confirms their appointment.

This note will go above the previous confirmation note in the appointment notes so it reads in order of last effort made to first effort made.

ALWAYS SIGN OFF ANY NOTE YOU MAKE WITH YOUR INITIALS

It is important that we record how and when a client confirms their appointment in the event that they late cancel or miss their appointment. We want to be well informed of all the efforts made to advise client's of their appointment, and that this can be easily identified simply via looking at the appointment notes on the booking.

Imagine the following scenario:

Today is the 10th May. You call a client 5mins into their appointment as they have not arrived. The client says they've forgotten about it. The notes on the appointment read:

*Cl. called to confirm @ 3.12pm on 09.05.24
LMOVM & sent text re. confirm @ 11am on 09.05.24*

This means that they received our automated message 2 days prior, a voice mail and follow up text yesterday at 11am, and then the client actually called back later in the afternoon and verbally confirmed over the phone.

Based on this information, and our efforts to contact them, we could be very confident in charging a missed appointment fee on the spot.

If the above notes had been absent from the appointment, then you would not be confident in the moment for how reception the previous day had handled reminding this client of their appointment and it would require further investigation before we could say that it would be fair for a fee to be charged.

CONFIRM CALL SUMMARY

Monday – Friday

- BOT/system automated message set to go out in the AM 2 days before appointment
- 10am – 12pm – First round of confirm process (Call / LMOVM & Send first follow up text message)
- 2pm – 5pm *Depending on close time of clinic (please don't do this too early!)* - Send EOD confirm text
- Next morning – send final confirm message. (make sure to check BOT/voicemails & email first)

Saturday Confirm Process for Monday

- 12pm – First round of confirm process (Call / LMOVM) * DO NOT FOLLOW UP VOICEMAILS WITH FIRST TEXT. BOT'S CONFIRM MESSAGE SHOULD BE THE LAST THING ACTIVE IN THE CHAT AND THEY CAN RESPOND TO THIS* (they would have only received this that morning)
- 2pm - Send EOD confirm text for Monday
- Monday morning – send final confirm message. (make sure to check BOT/voicemails & email first)

IMPORTANT - CLIENT FORM CHECKS DURING CONFIRMATION PROCESS

Please be mindful with our form checks and sending emails/texts to the client. If this has not gone out in advance of the confirm messages, please wait until the client confirms the appointment to send this. If the bot tries to send it's confirmation message and then we override it with a form text then we will disrupt the client's ability to confirm/cancel their appointment themselves.

UNCONFIRMED APPOINTMENTS WITH A MALC HISTORY

Any unconfirmed appointment carries a risk that the client may no-show or late cancel. Even more so if the client has a history of MALCs.

As per our appointment policy, unconfirmed appointments may be cancelled. It is very important that we follow all steps of our confirmation call process and MALC procedures accurately on every occasion, so if we are in a situation where we feel it is reasonable to cancel a client's appointment, we are confident with our messaging and feel comfortable to do so.

FIRST TIME APPOINTMENTS UNCONFIRMED

If we are having a tough time reaching a client to confirm their appointment but there is no history of no-shows/late cancellations, we will give them the benefit of the doubt on this occasion that they will arrive.

When they do come in for the appointment you will need to have a conversation with them about this:

- Check in and make sure everything is okay “___ We were having a tough time reaching you to confirm this appointment, did you receive all our messages okay?” We may need to confirm their phone number and email if they didn't receive our efforts.
- Try and get a reason out of them for not responding
- Encourage them to respond the the automated message
- Advise them that we do chase confirmation, and unconfirmed appointments are at risk of being cancelled to avoid disappointment (on both sides).

****If and when this conversation is necessary, add a note in the NOTE section of the client's file to confirm that they have been verbally made aware of this.****

NOTE EXAMPLE: 17.04.24 - Client did not confirm appt. Confirm with client on arrival that they had received all our messages. Did not have a reason for not responding. Advised of the confirm process and made aware that in future we may cancel unconfirmed appointments- EM

UNCONFIRMED APPOINTMENTS (MALC HISTORY)

If we are having a tough time reaching a client to confirm their appointment and they have a history of no-showing/late cancelling (especially if the very last visit was a no-show!) we can take steps to cancel their appointment if we do not think they will attend AND we have other clients on our cancellation list who want that appointment spot.

THE MORNING OF

Instead of sending the final day-of confirm message, call the client one last time. If you do not reach them directly, leave a voicemail and send the following text if necessary:

Script for phone call

“Hi ____, this is ___ from No More Knots. We have been trying to reach you in order to confirm your appointment for today. As we have not heard back from you and received confirmation, we have CANCELLED this appointment, as per our appointment policy. Please give us a call on (CLINIC NUMBER) when you are ready to reschedule.”

Script for text message

YOUR APPOINTMENT HAS BEEN CANCELLED

Hi (CLIENT NAME), We have made several efforts to contact you in order to confirm attendance for your treatment today. As we have not heard back from you, your appointment has been CANCELLED, as per our appointment policy. Please give us a call on (CLINIC NUMBER) when you are ready to reschedule. - Kind Regards, NMK Reception

Consult with your clinic manager around this process if you feel it may be required. You may need to do this in the evening the day before if the appointment is an early morning session. The point of this is to cancel the appointment just outside of 4BUSINESS hours notice so it is not considered a late cancellation.

We will only takes steps to do this if the client has a recent, proven history of being unreliable (MALC's), and we are confident the appointment can be filled by another client.

If you do follow this process, follow the CANCELLED APPOINTMENT procedure (do not Early Cancel).

PHONE PROCEDURES

The phones are the same throughout all clinics. Our current Phone Provider is Smart Business Systems (SBS). If you have any issues with the Phone set up, please contact them.

To dial out

Lift the receiver and dial the number.

To answer a call, either:

- Lift the receiver to connect to the caller.
- Press the line key that has the flashing green indicator if using a phone from a manager's office or tea room.

Internal calls

Lift the receiver and press the line key of the person (Manager's office) or location (Tearoom, another clinic's reception) you would like to contact which can be found on the phone home screen.

To place a call on hold

Press the hold key or select hold during a call. The hold button will only display when you are on an active phone call.

To retrieve a call from hold

Press the flashing red button to reconnect with the caller on hold.

Transferring a call

- Press the TRANSFER key or select the transfer option available during an active call.
- Select the line you would like the call to transfer to, then select the transfer key again to complete the transfer.



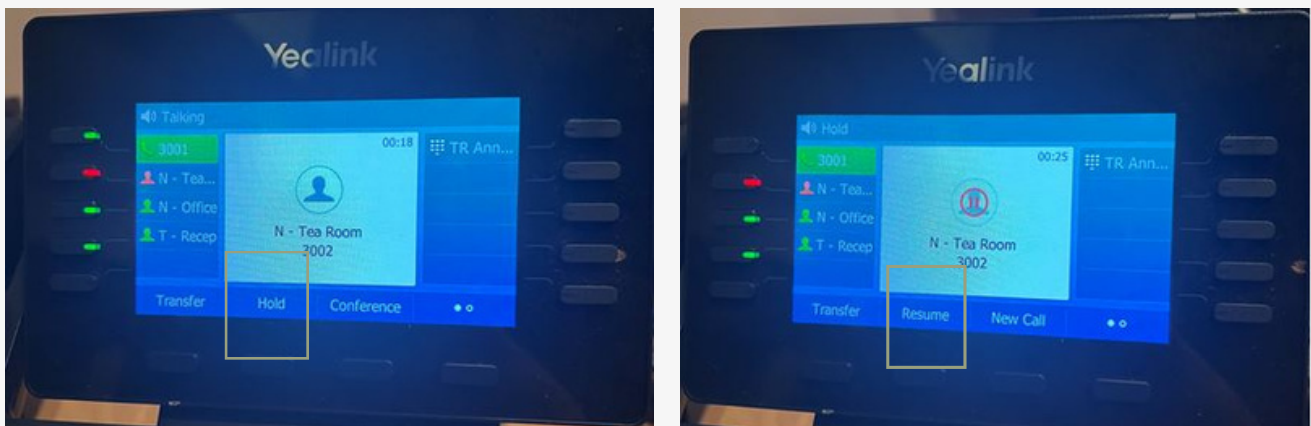
PLACING A CALL ON HOLD

The action of placing someone on hold is really quite easy. You simply press the hold key or select the hold option available in an active call.

Hold Button on Dial Board



Hold & Resume Button in an Active Call



To retrieve the call, select the hold button again to resume the call. Alternatively, you can select the resume option available in an active call. When multiple calls are on hold, select the line key you would like to retrieve to reconnect with caller, it will be flashing.

Whilst the actions are easy, the conversation surrounding the need to place someone on hold can sometimes be a little tricky!

Always ask. A nice way to say this is *'Do you mind if I place you on hold for one moment? I won't be long'*. NEVER use the words, *'do you mind if I chuck you on hold'*, or *'throw you on hold'*. Our clients are not something to be thrown around, even if it is figuratively!

When returning to the call. Always thank the client for holding! *'Thank you for holding, how can I help?'* And then return to the conversation you were previously having.

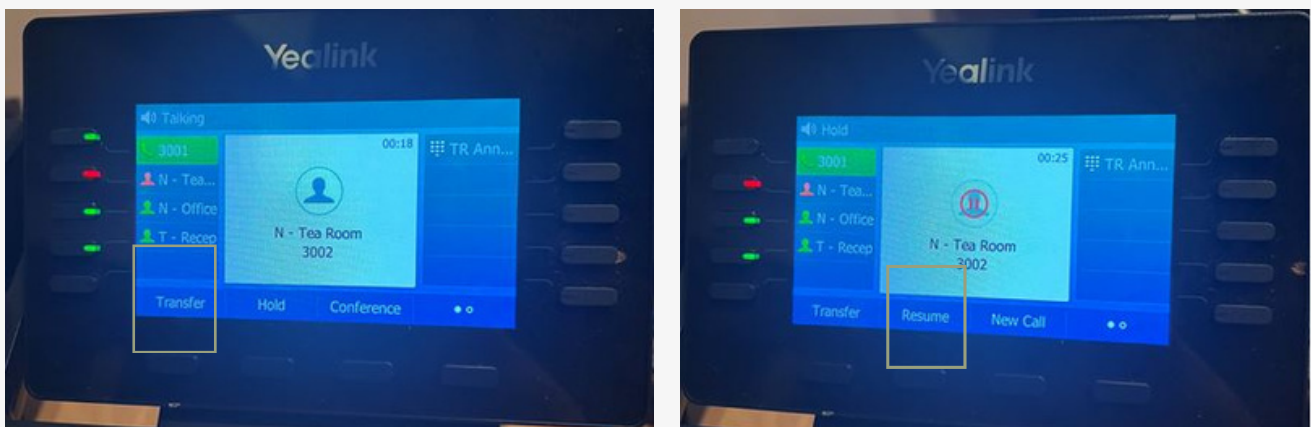
TRANSFERRING A CALL

Transferring is a function that allows phone calls to be transferred internally to different offices or clinics. This allows reception to transfer a caller to a manager or alternative clinic promptly

Hold Button on Dial Board



Hold & Resume Button in an Active Call



To retrieve the call, select the hold button again to resume the call. Alternatively, you can select the resume option available in an active call. When multiple calls are on hold, select the line key you would like to retrieve to reconnect with caller, it will be flashing.

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When returning to the call. Always thank the client for holding! *'Thank you for holding, how can I help?'* And then return to the conversation you were previously having.

PAGING/MAKING ANNOUNCEMENTS

We have previously used the paging option on the phones to announce client arrivals to therapists who are already in treatment. This is sometimes called 'announcing the client'. Although we no longer use the paging option to announce clients, it is important to understand how and when to use this function.

Greenslopes reception is the only location that has a pager option. To make an announcement, select the pager line key. You will hear 1 distinctive ding and then you may make your announcement in a loud, clear voice. It is important though that you don't yell! Clients do not want to be interrupted throughout their treatment by someone yelling every 10 minutes!

The announcement should be clear and concise. Repeat the announcement twice, before ending the announcement by clicking the 'X' button to avoid a clucky sound from putting the receiver down.

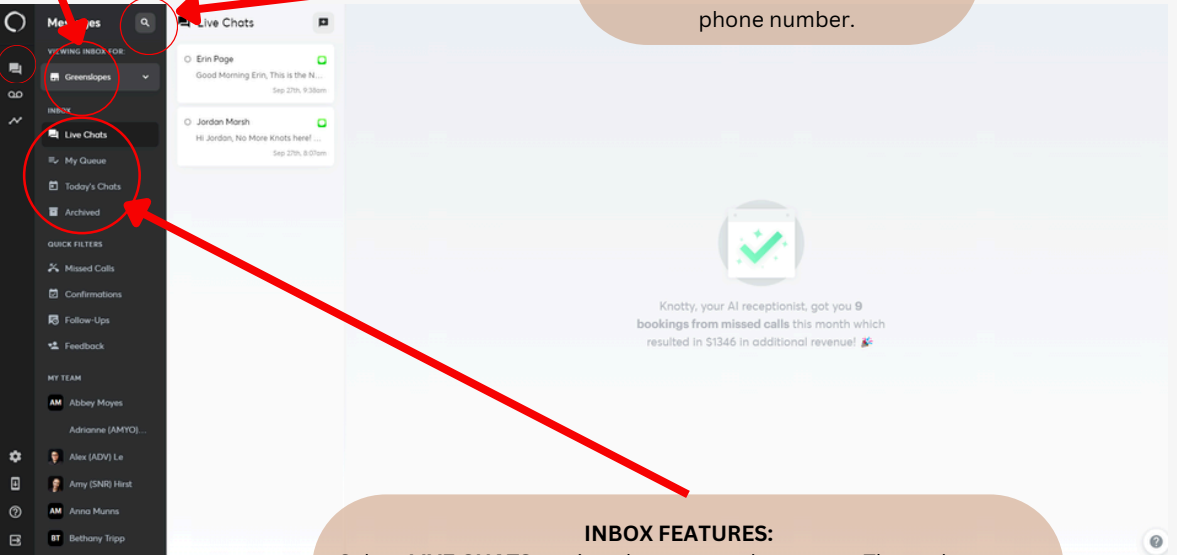


MESSENGER AI

MESSENGER AI is our SMS system and is an extended feature of MINDBODY. It includes a BOT which acts as a virtual receptionist and can message directly with clients. It is directly integrated with our phone systems as well, so when clients call the clinic we can listen to any voicemails straight from this system on the computer - not on the phone.

MAIN DASHBOARD

Log in to MESSENGER AI - each clinic will have a unique login.



LOCATION:
Each clinic has its own unique inbox, depending on the location the client has connected with

SEARCH:
Want to see the chat history for a particular client? Click on the SEARCH feature and enter the phone number.

Message Dashboard:
Select this icon to bring you back to the chats (This is the current view mode)

INBOX FEATURES:
Select **LIVE CHATS** to view the current chats open. These chats are for us to engage with. The BOT will not respond to the client in the LIVE CHAT.

Select **MY QUEUE** to view chats the BOT has flagged for us to engage with. The BOT will flag chats for our attention if it believes it is not able to help the client, or has not received a response in a certain time frame. You will need to move these chats to the LIVE CHAT section.

TODAYS CHATS are all active chats for today. You may wish to view this the check on any chats currently going on with the BOT.

ARCHIVED is the history of all previous chats. We recommend just using the search feature if you are looking for a specific chat.

CHECKING A VOICEMAIL - MESSENGER AI

Anyone who calls the clinic and gets to our voicemail will be prompted to leave a message. When a client leaves us a message, our virtual receptionist KNOTTY (the BOT) will attempt to decipher it and respond to them. These chats will show up in the inbox for the clinic that they called. Depending on whether or not the BOT was successful in it's interaction with the client, the chat may either be in TODAY'S CHATS or in the MY QUEUE box.

To check and listen to the original voicemail, click on the phone icon underneath the message icon on the far left-hand side.

The screenshot shows a web interface titled 'My Voicemails'. On the left, there is a vertical sidebar with a phone icon circled in red. The main area displays a list of voicemails with columns for client ID, phone number, date/time, duration, and a 'Mark as Resolved' button. Three red arrows point from callout boxes to specific elements: the sidebar icon, a play button in the first row, and the 'Mark as Resolved' button in the third row.

Client	Phone Number	Date/Time	Duration	Action
Client 136165588	0402681880	September 27th 2024, 10:28:41 am	2 sec	Mark as Resolved
Client 136165588	0402681880	September 27th 2024, 10:28:41 am	2 sec	Mark as Resolved
Client 136165588	0413030118	September 27th 2024, 8:43:20 am	37 sec	Mark as Resolved

Voicemail Dashboard:
Select this icon to take you to view all voicemail recordings. (This is the current view mode)

PLAY RECORDING:
Select this button to play the audio recording of the voicemail. It will play directly through the computer so just make sure you don't do this on a device connected to the clinic PA system!

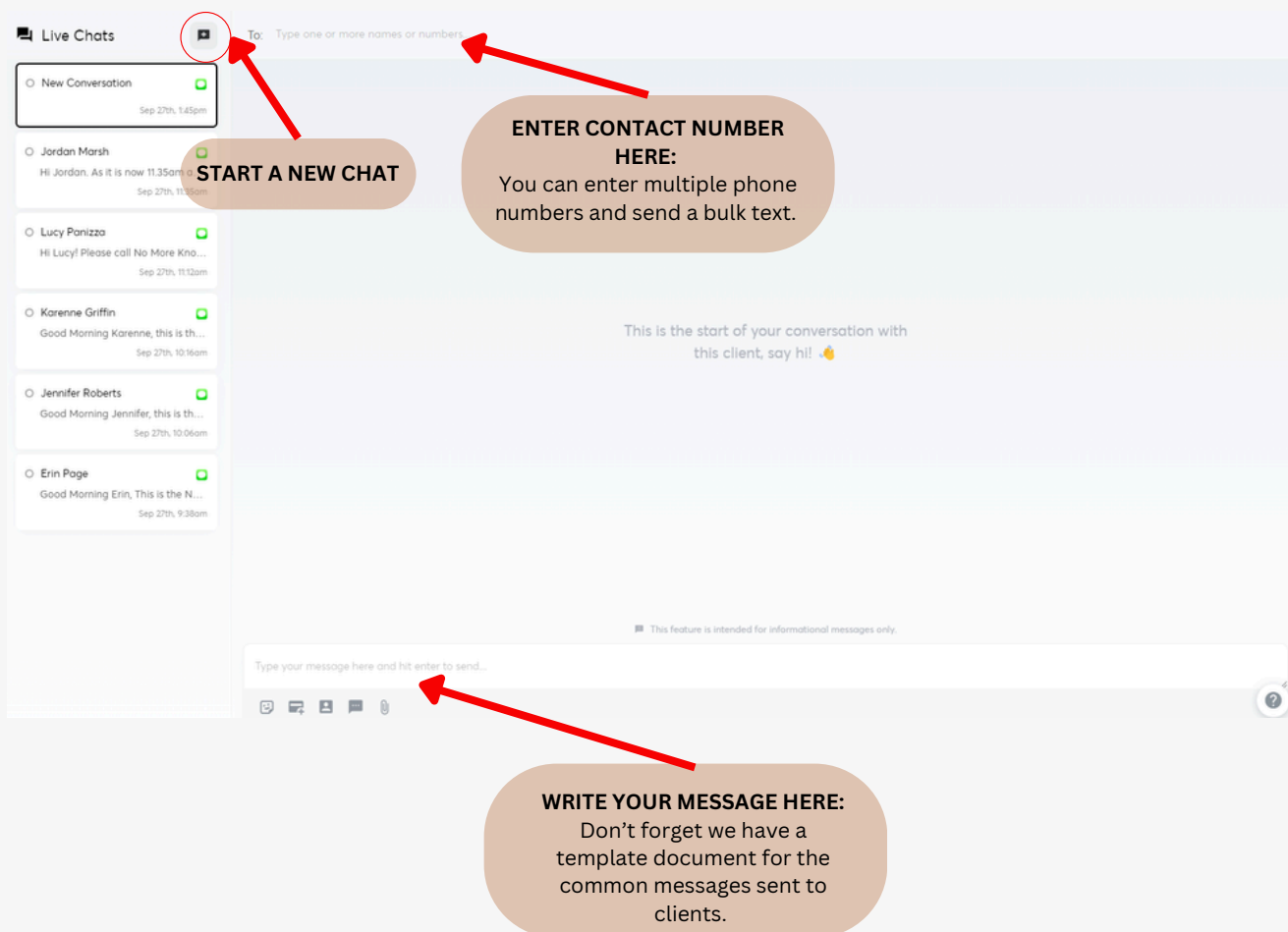
RESOLVE THE VOICEMAIL:
After you have finished dealing with the voicemail, click the MARKED AS RESOLVED button to remove it from the list.

LIVE CHATS

LIVE CHAT function is where we will directly engage with clients. You can take over a chat from the BOT by selecting START LIVE CHAT, which will bring it to this section of the inbox. Here, you can also start a new conversation with a client.

The BOT will ignore any chat that is sitting in the LIVE CHAT section of the inbox. Only we can respond to these messages. This means it is important that once we are done engaging with a chat, we will need to resolve it, to remove it from this part of the inbox. We also want to be careful about resolving any chats too early - If you send a message to a client that you want a response to it is best to leave it in the LIVE CHAT section. If you resolve it, the BOT will attempt to respond to the client's follow up, which could potentially result in some confusion for the client.

As a general rule, leave a chat in the LIVE CHAT section for the day before resolving it UNLESS we need to keep following up with the client.



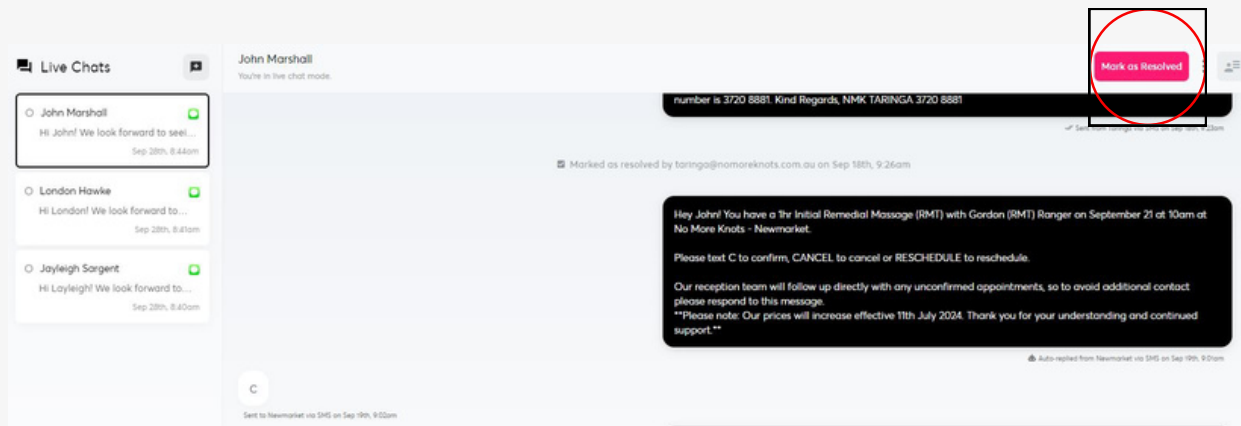
The screenshot shows a 'Live Chats' interface. On the left is a list of chat conversations, including 'New Conversation', 'Jordan Marsh', 'Lucy Panizza', 'Karenne Griffin', 'Jennifer Roberts', and 'Erin Page'. The main area shows a new chat conversation starting with the text: 'This is the start of your conversation with this client, say hi! 🙋'. Below this is a text input field with the placeholder 'Type your message here and hit enter to send...' and a toolbar with icons for emojis, attachments, and other functions. Three callout boxes provide instructions: 1. 'START A NEW CHAT' points to the 'New Conversation' button in the list. 2. 'ENTER CONTACT NUMBER HERE: You can enter multiple phone numbers and send a bulk text.' points to the 'To: Type one or more names or numbers' field. 3. 'WRITE YOUR MESSAGE HERE: Don't forget we have a template document for the common messages sent to clients.' points to the text input field.

START A NEW CHAT

ENTER CONTACT NUMBER HERE:
You can enter multiple phone numbers and send a bulk text.

WRITE YOUR MESSAGE HERE:
Don't forget we have a template document for the common messages sent to clients.

Click on any chat in the LIVE CHAT section and click the MARK AS RESOLVED button to remove from the list. This chat will be ARCHIVED.



MY QUEUE OR TODAY'S CHATS

You will want to keep an eye on the MY QUEUE & TODAY'S CHATS section of the inbox throughout the day to see if there are any chats that we may need to take over. It is important to remember that the BOT is programmed to handle certain situations and outcomes; however, it does rely on the system picking up on specific key words in the client's messages. It works very well for most, straight forward requests, but it is not perfect!

If the client fails to respond to the BOT's standard prompts, the message should be flagged in the MY QUEUE section. This is the system's way of telling us that it doesn't believe it is helping the client successfully and suggests that we take over. However, it may not always be recognised that it has been unsuccessful which is why it is also recommended to check the TODAY'S CHATS section.

If you find a chat that you would like to take over on, simply click the START LIVE CHAT button. This conversation will be automatically moved to the LIVE CHAT section of the inbox.



TOWELS

The towels that we use are designed specifically for our clinic and to be environmentally friendly. They are not as thick as regular towels and therefore we can fit more into the washing machine, cutting down on the number of loads that are required. They are also faster to dry which decreases the amount of electricity used per load.

We have 3 different towel types:

- Large orange towel - These are for covering and drapping the client. Therapists generally use 1 - 2 of these per treatment.
- Large black towel - These are used as the top cover on the base of the massage beds. These are changed between every client.
- Small black towel - These are used as the top cover on the face crest of the massage beds. These are changed between every client.



FOLDING TOWELS

Folding towels is an art form! Its important that our towels are folded neatly both for ease of storage and presentation for clients.

ORANGE TOWELS



Start holding the towel with the short edge along the top. Fold in half along the short edge matching the corners together. Repeat again along the same edge.



Fold the towel in half along the long edge, hiding all exposed edges and matching up all the corners. From here, fold the towel into thirds, again making sure the exposed edges are on the inside.

BASE TOWELS



Fold the towel in half along the long edge with the shiny side of the fabric together, matching up the corners and edges as much as possible. Repeat again along the same edge.



Fold the towel in half along the long edge, hiding all exposed edges and matching up all the corners. From here, fold the towel into thirds, again making sure the exposed edges are on the inside.

FACE TOWELS



Start by folding the towel in half along the long edge, keeping the shiny side together. Then fold it into thirds, just like with the larger black towel, keeping the corners and edges matched up.

THERAPIST CATEGORIES

The categories of our therapists are determined by a variety of factors, but predominantly focuses on qualifications and industry experience. Below is a general break down of our three main levels.

REMEDIAL MASSAGE THERAPIST

They have:

- A minimum Remedial Diploma level qualification
- Approved for health fund rebates
- 100 – 2000 hours hands on industry experience
- Have partaken in 2-10 NMK renown workshops/tutorials
- Are dedicated to their ongoing professional development within the industry

They provide:

- Essentials in physical assessment
- Very effective hands on remedial/sports/soft tissue treatment
- Stretching advice to assist in between treatments
- Treatment planning advice and care

SENIOR REMEDIAL THERAPIST OR SENIOR MYOTHERAPIST

They have:

- A minimum Remedial or Myotherapy Diploma level qualification
- Approved for health fund rebates
- Have between 1-10 years industry experience
- Have partaken in 10-50 industry tutorials/workshops
- Established industry referral networks to assist with your ongoing wellbeing

They provide:

- Strong to advanced levels of assessment
- Advanced level of hands on remedial/sports/soft tissue treatment
- Effective treatment for acute & chronic conditions
- Effective & varied stretching/exercise advice
- Identification of causes of varied conditions
- May have additional skills such as cupping/dry needling & lymphatic drainage
- Have often worked with elite & international

ADVANCED REMEDIAL THERAPIST OR ADVANCED MYOTHERAPIST

They have:

- A Degree in Health Science with a minimum of 1 year industry experience OR Diploma level qualification in Remedial Therapies with a minimum of 4 years industry experience
- Extensive further short courses and professional development of an advanced and technical nature
- Attendance of 15-50+ industry workshops/tutorials

They provide:

- Advanced level of assessment with additional skills in special testing for complex conditions
- Specialise in dealing with acute and chronic conditions related to the musculoskeletal system
- Expert levels of hands on remedial/sports/soft tissue treatment
- Advanced level of stretching & rehab exercise advice
- Ability to identify causes of complex conditions and injuries

SERVICES

REMEDIAL MASSAGE



What is remedial massage?

Remedial massage is a targeted, assessment-based approach to manual therapy. It is a treatment that focuses on the parts of the body that require attention in order to effectively treat a specific pain, condition or injury and restore function to the body.

A remedial treatment will firstly start with a health history check and assessment, including a review of the muscles & other structures involved in the area of complaint. Once the therapist understands the issues causing the pain, they will then perform a targeted manual treatment of the area. A remedial treatment is performed with a specific goal in mind which means that it will often be done over a series of sessions, where the therapist is constantly assessing the state of the client and noting any improvements or deterioration. This allows them to adjust their treatment and give their client the best possible chance of recovery.

As part of a remedial treatment, therapists will use a variety of different techniques in order to achieve an outcome for the client including; Swedish/relaxation, deep tissue therapy, trigger point therapy, muscle energy techniques, stretches and more.

Who will benefit from remedial massage?:

Everyone!

If you feel physical pain or discomfort in your body, it's likely being caused by dysfunction (such as tightness, misalignment, overuse or incorrect postural habits) within your musculoskeletal system, and remedial therapy can help you with this.

Some of the more common conditions remedial massage can assist with include:

- Headaches and neck pain.
- Hip and leg pain.
- Pain between the shoulder blades.
- Lower back pain.
- Running pain (shin splints, ITB tightness).
- Tendonitis.
- Chronic inflammation.
- DOMS (delayed onset muscle soreness from exercise).

What should a client expect in a remedial massage treatment?

Initial appointments are 1 hour in duration (minimum) and will include:

- Brief assessment
- Hands on treatment.
- Recommendations for home care, such as stretches (if applicable).

Subsequent appointments may be shorter (30mins or 45mins), however the majority of clients feel that the best results are achieved after 60 minutes of remedial treatment.



MYOTHERAPY

What is myotherapy?

Myotherapy is a comprehensive and integrative approach to the assessment and treatment of your pain and dysfunction to identify the cause of your musculoskeletal conditions. It began as an extension of Remedial Massage but has emerged to treat more complex conditions and incorporates a deeper understanding of the human body, anatomy and physiology into its practice.

Clinical Myotherapists are primary practitioners and are trained in a wide range of orthopaedic, neurologic and functional testing to gain a thorough understanding of a client's physical state.

The current minimum qualification is an Advanced Diploma in Myotherapy, however, some Myotherapists complete higher education with a Bachelor of Health Science (Clinical Myotherapy).

What should a client expect in a myotherapy treatment?

Initial MYO appointments are 60 minutes in duration and will include:

- Assessment - to determine the cause of your pain or discomfort, and how/why it has developed
- Hands on treatment - may include deep tissue massage, Myofascial Release, Dry Needling, Trigger Point Therapy, Neuromuscular Techniques (less painful or less invasive)
- Exercise Advice - Exercises that are SPECIFIC to you, your lifestyle and your condition
- Home Care Advice - How to manage your body to further reduce your pain or discomfort

From your MYO appointment, you will be provided with comprehensive answers and an understanding about how your injury/dysfunction came about, how to avoid reoccurrence and you will also gain access to trusted practitioners from our extensive referral network.

LYMPHATIC DRAINAGE

What is lymphatic drainage?

Lymphatic massage, also known as manual lymphatic drainage, is a specialised form of manual therapy to support the body's lymphatic system. It is particularly beneficial for treating conditions like lymphedema, where lymph fluid accumulates in certain areas.

The goal of lymphatic massage is to stimulate the flow of lymphatic fluid, which helps reduce swelling and congestion.

Who can benefit from lymphatic drainage?

Lymphatic massage can be highly beneficial for clients experiencing a build-up of lymphatic fluid, which could be a result from various medical conditions, including but not limited to.

- Cancer and cancer treatments
- Certain types of vascular surgery
- Lipectomy
- Infections or trauma affecting the lymphatic system
- Deep vein thrombosis (DVT)

Lymphatic massage can alleviate discomfort and swelling associated with these types of conditions by promoting better fluid drainage.



BOOKING A CLIENT IN FOR LDM

When a client enquires about lymphatic drainage massage, it is important to ensure they are booked in with one of our practitioners who specialise in this technique. Refer to the Therapist Skills Checklist.

Book them in as a regular remedial appointment with a therapist who provides this style of treatment. There is no separate CONSENT FORM for LDM, just ensure there is a current copy of our standard CONSENT FORM on file.

PREGNANCY MASSAGE

What is pregnancy massage?

Pregnancy massage is a version of remedial massage that is adapted to suit the specific needs of expectant mothers.

A woman's body undergoes many physical changes during pregnancy, some of which can cause pain and discomfort. Remedial massage can help to eliminate and relieve symptoms and complaints associated with the positive physiological effects of pregnancy.

At No More Knots, mums-to-be may take advantage of specially designed pregnancy massage beds which allow for safe front-lying treatment. Pregnancy treatments may also be conducted side-lying, or in a seated massage chair if the client prefers.

Can remedial massage induce labour?

Remedial/Pregnancy Massage is unable to bring on or encourage labour; however, keeping the body relaxed and the muscles healthy in the lead up to labour is beneficial.

Can remedial massage cause miscarriage?

There are no direct links between massage and miscarriage. All of our therapists are trained to perform health history checks and identify any risk factors that may be relevant to you and your pregnancy prior to commencing any treatment.

Who should get a pregnancy massage?

Anybody going through pregnancy! It is a great way to relieve those aches and pains your body is no doubt experiencing throughout pregnancy. It is beneficial in improving sleep and restoring energy levels. A relaxed and refreshed, stress free mum-to-be helps provide an optimal environment for your developing baby.

Who shouldn't get a pregnancy massage?

Those deemed high risk by their primary care provider or with a history of miscarriage.

MYOFASCIAL DRY NEEDLING

What is Dry Needling?

Myofascial Dry Needling (MDN) is a form of treatment available to aid dysfunctions of the musculoskeletal system. During this therapy, super-fine filament needles are inserted into the skin to directly affect the myofascia (muscles and fascia), with the aim of altering dysfunction that has developed. For example, dry needling is commonly used to deactivate hyperirritable areas in skeletal muscle known as trigger points or 'knots'. Dry needling can help to restore healthy function to the affected tissues, helping you to feel better.

Is it the same as Acupuncture?

The only similarities are the needles used. Dry Needling follows principles of "Western medicine" whereas Acupuncture follows principles of "Chinese Medicine and Eastern Medicine." (We insert needles to target "trigger points" as opposed to meridians/energy points)

Does it hurt?

Surprisingly not as much as people may think, most of our clients actually find it less painful than traditional trigger pointing. The needles are a lot smaller than those used for injections and generally don't hurt when they are inserted. The same referral pain that would be felt through trigger pointing (when therapists use their thumbs) may still be experienced.

Who should get needled?

Needling is an invasive technique, and for this reason our therapists will decide if needling is a suitable option for your complaint. Therapists will communicate and decide on this in the assessment. 99% of clients are fine to experience dry needling.



BOOKING A CLIENT IN FOR NEEDLING

When a client enquires about dry needling or requests an appointment including this service, it is important to advise them that it is up to the therapist discretion as to whether they will receive this during treatment. Make sure to book them in with a therapist who is qualified to provide dry needling and let them know that the therapist will be aware that they would like it considered as part of their treatment. The therapist will need to assess at the time of consultation as to whether it is an appropriate and safe technique to use considering their complaint.

Book them in as a regular remedial appointment with a therapist qualified for needling and make a note on the appointment that the client would like dry needling. Client's will also need to complete a DRY NEEDLING CONSENT FORM.

CUPPING

What is cupping?

Cupping is a gentle and effective technique that aims to restore function, movement and flexibility to the soft tissue that connects the body's muscles, cartilage, ligaments and tendons.

Derived from traditional Chinese medicine, cupping uses either heat or suction to create a vacuum effect in a glass or plastic cup, which is placed on the skin. The vacuum acts to gently lift the skin and underlying tissues, to break up cross linkages between the tissue layers that limit our flexibility. Cupping also promotes the hydration of these tissues to help prevent further cross linkages from forming.

It is not uncommon for clients to occasionally have residual marks, similar to bruising, from cupping, on the surface of their skin, but these are usually painless and will clear within 2 to 7 days. Cupping is a highly effective technique which you will find very gentle and highly enjoyable. Cupping is known to help activate the lymphatic system, promote blood circulation, and is extremely useful for deep tissue repair.

Who should get cupped?

Anybody wanting to feel and move better. There are some instances where cupping therapy will be contraindicated, but the therapist will determine this as part of the initial assessment.

Cupping is generally employed as a complimentary technique during remedial or myotherapy treatments rather than as stand-alone treatment.

Although cupping is suitable for the majority of clients, we ask that clients mention their desire to have cupping included in the treatment at the time of booking, to ensure the availability of equipment.



BOOKING A CLIENT IN FOR CUPPING

As a complimentary technique, not all therapists are trained or comfortable with using cups as part of their treatment style. Unlike dry needling, cupping is not something a therapists needs to be qualified in after completing their diploma in order to use them, but often they have not had a lot of experience or chosen not to use them as a technique. It is important to double check the current '**Skills Checklist**' to make sure that you are booking a client who has requested cupping with a suitable therapist. Client's will also need to complete a CUPPING CONSENT FORM.

PRICES

The prices for our services are determined by the level of therapist seen and the duration of the treatment. The session time includes assessment and hands on treatment, as well as time for getting on and off the table and any follow-up or final consultation.

A 1hr treatment does not equal 1hr of hands on treatment. Remedial, myotherapy and pregnancy massage are all priced the same and there is no additional cost for dry needling or cupping.

	RMT	SNR/SMYO	ADV/AMYO
30MIN	\$76	\$81	\$88
45MIN	\$99	\$105	\$115
1HR	\$117	\$124	\$135
90MIN	\$175	\$186	\$202
*2HR	\$234	\$248	\$270

Our standard consultations are 1hr in length. It is strongly advised that all initial clients have 1hr scheduled for their first visit to allow the necessary time for a first time assessment and health/client history check, as well as hands on time.

30min and 45min sessions are suitable for subsequent treatments, but most clients and therapists find that the best results are achieved after 60 minutes of remedial treatment. 90mins are great if the client has multiple or quite complex complaints to be addressed. It is ideal though that the client has already had a 1hr initial treatment and the therapist has recommended this longer session time for their follow up treatment. 2hr appointments are possible if recommended and approved by the treating therapist. This service length is not advertised on our website.

****There is an additional \$5.50 surcharge added to all appointments on a weekend or public holiday. The above price list reflects our standard Monday to Friday prices****

CLIENT FORMS

Client forms are an important part of our record keeping procedures, and are a legal requirement for our industry. The forms we have designed at NMK follow the guidelines set by our associations in order to meet the standard required for Australian Private Health funds.

Accurate competition and maintenance of these records is critical in protecting both our therapists, and ensuring that our clients receive safe and effective treatment.

CLIENT FORMS are required for every client that does not have a previous form on file at our clinics (eg. initial clients). These must be completed and signed in order to proceed with treatment.

UPDATED CONSENT FORMS are required every 2 years, if the client has a previous signed form on file. These forms ask the client if any of their details/circumstances have changed since their last form and cover off on the same main questions that our CLIENT FORM does.

PREGNANCY FORMS are required to be completed once per pregnancy. They ask similar health history questions to our CLIENT FORMS but are tailored specifically to capture medical information relevant to pregnancy.

TREATMENT SPECIFIC CONSENT FORMS are required for certain treatment techniques that may be used within a Myotherapy or Remedial massage treatment. This is due to either the way the treatment is performed or the potential risks associated with the treatment which might differ to a standard treatment. We currently have specific consent forms for the following treatment techniques:

- CUPPING THERAPY
- DRY NEEDLING
- INTRA ORAL MASSAGE
- AYURVEDIC MASSAGE

Clients are required to read and sign one of these forms before receiving the technique as part of their treatment. They only need to do this once.

Each of our different consent forms are available in paper form, and digitally in MINDBODY. It is important that you are familiar with each form so you can answer any questions a client may have in completing it.

SENDING DIGITAL CLIENT FORMS

Where possible it is preferred to try and collect a completed client form prior to treatment. This helps our therapists prepare for treatment, and saves the client time on their arrival.

If you need to send a digital copy of any of our consent forms to a client, you will do this through their client profile in MINDBODY.

1. Go to the DOCUMENTS section of the clients profile.
2. Scroll down to see the CLIENT FORMS section.
3. Select SEND CLIENT FORMS
4. Select the forms you want to send, then click SUBMIT. This will send the client an email with a link to complete an online copy of the form.

Emma Leigh Georgia Murdoch

elgmurdoch@gmail.com 0468 542 133

Client Home Client Info Contact Logs Schedule Visits Purchases Account Details **Documents** SOAI > M...

Document Name	Size	Format	Date Submitted	Action
Greenslopes medibank Provider Lett...	196KB	pdf	21/01/2022 8:50:04 AM	Delete
Infection Control Training Certificate ...	409KB	Chrome HTML Document	16/06/2020 4:17:31 PM	Delete
Newmarket Medibank Provider Num...	206KB	pdf	6/11/2023 4:43:03 PM	Delete
Q Academy Medibank and HCF Co...	325KB	pdf	21/01/2022 8:15:19 AM	Delete
Taringa Medibank Provider Letter.pdf	194KB	pdf	21/01/2022 8:49:53 AM	Delete

Client Forms

NAME	STATUS	DATE SUBMITTED	VIEW LOG	ACTIONS
NMK Updated Client Consent Form	Submitted	5/8/2024		
NMK New Client Intake & Informed Consent	Submitted	8/17/2023		

Send Client Forms

Client Forms without Booking

SELECT CLIENT FORMS

- NMK Myofascial Cupping Informed Consent
Last Updated: 8/16/2023
- NMK Intra-Oral Massage Treatment Informed Consent
Last Updated: 7/20/2023
- NMK Myofascial Dry Needling Consent Form
Last Updated: 8/16/2023
- NMK Updated Client Consent Form

Send

ENTERING CLIENT FORMS

If a client does not complete the online form, they will need to complete one in clinic prior to the beginning of their appointment.

It is important to CHECK that every form has been SIGNED.

No More Knots CLIENT FORM
— We'll straighten things out —

NAME: _____ MOBILE / PHONE (H): _____ POSTCODE: _____
 ADDRESS: _____
 DATE OF BIRTH: _____ EMAIL: _____
 HEALTH FUND: _____ OCCUPATION: _____

EMERGENCY CONTACT INFORMATION

NAME: _____
 RELATIONSHIP: _____
 CONTACT NO.: _____

HOW DID YOU HEAR ABOUT US?

SIGNAGE/DRIVING PAST:
 ANOTHER CLIENT: Full Name _____
 SOCIAL MEDIA: Which? _____
 GIFT CERTIFICATE:
 GOOGLE SEARCH:
 PHYSIO/CHRO/CP/PT: Who? _____
 OTHER (please specify): _____

COMMUNICATION PREFERENCES

As a part of our service to you, we will send you SMS text and/or email reminders & confirmations regarding appointments and promotions.
 Please tick your preferred method of communication:

MOBILE TEXT & EMAIL TEXT ONLY EMAIL ONLY

PREFERRED PRESSURE

GENTLE MEDIUM FIRM

LEVEL OF CONVERSATION

LOW MEDIUM HIGH

WHAT ARE YOUR TREATMENT GOALS + REASONS FOR VISITING?

HOW OFTEN WOULD YOU LIKE TO GET TREATMENT?

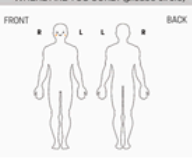
WEEKLY MONTHLY
 FORTNIGHTLY ONLY WHEN INJURED/NEEDED

DO YOU PARTAKE IN REGULAR EXERCISE?

YES (Please specify type below) NO

WHERE ARE YOU SORE? (please circle)

FRONT BACK



DO/HAVE ANY OF THESE APPLIED TO YOU? (please circle)

Allergies Asthma
 Arthritis Blood Clots
 Cancer Depression/Anxiety
 Diabetes Dizziness
 Headaches/Migraines Heart/Respiratory Conditions
 High Blood Pressure Infectious Conditions
 Joint Replacement Kidney Conditions
 Loss of Balance Neck/Spinal Injury
 Numbness Osteopenia/Osteoporosis
 Past Surgeries Pregnant (How many weeks)
 Recent Accident/Injury Shingles
 Sleep Disorders Skin Disorders
 Smoking Varicose Veins

OTHER CONDITIONS/FURTHER INFO: _____

ARE YOU ON ANY MEDICATIONS? (please specify)

HAVE YOU RECEIVED TREATMENT IN THE PAST 6 MONTHS?

PHYSIO | CHRO | PODIATRIST | OSTEO | OTHER _____
 REASON: _____

ANY OTHER ISSUES YOU FEEL YOUR THERAPIST SHOULD BE AWARE OF BEFORE TREATMENT:

No More Knots UPDATED CONSENT FORM
— We'll straighten things out —

AN UPDATED SIGNED COPY OF THIS FORM IS REQUIRED EVERY 2 YEARS FOR OUR BUSINESS TO REMAIN COMPLIANT AND BEST PRACTICE - THANK YOU FOR YOUR COOPERATION

CLIENT NAME: _____ CONTACT NO.: _____
 EMAIL: _____

PLEASE UPDATE ANY OF THE FIELDS BELOW **THAT HAVE CHANGED** SINCE YOUR LAST SIGNATURE (ASK RECEPTION IF UNSURE). LEAVING A FIELD **BLANK INDICATES THAT NO CHANGES HAVE OCCURRED**

NEW - EMERGENCY CONTACT

NAME: _____ CONTACT NO.: _____

NEW ADDRESS

STREET: _____ SUBURB: _____ POSTCODE: _____

NEW - HEALTH FUND

PLEASE LIST: _____

NEW - OCCUPATION

PLEASE LIST: _____

NEW - HEALTH CONDITIONS/PREVIOUS INJURIES

PLEASE LIST: _____

NEW - MEDICATIONS

PLEASE LIST: _____

NEW - REGULAR ALLIED HEALTH PRACTITIONERS

PLEASE LIST: _____

PLEASE LIST ANY OTHER NEW RELEVANT CHANGES BELOW

 **PLEASE SCAN QR CODE FOR PRIVACY POLICY**

SIGNATURE REQUIRED

I, _____ have read and understood the appointment policy, privacy policy and give consent for No More Knots to assess and treat within the scope of a remedial massage therapist or myotherapist.

Signature: _____ Date: ____/____/____

***If you're under the age of 18, your parent/guardian must also sign and date your new client form.** Yes, I'm the parent/guardian.

Full Name: _____ Signature: _____ Date: ____/____/____

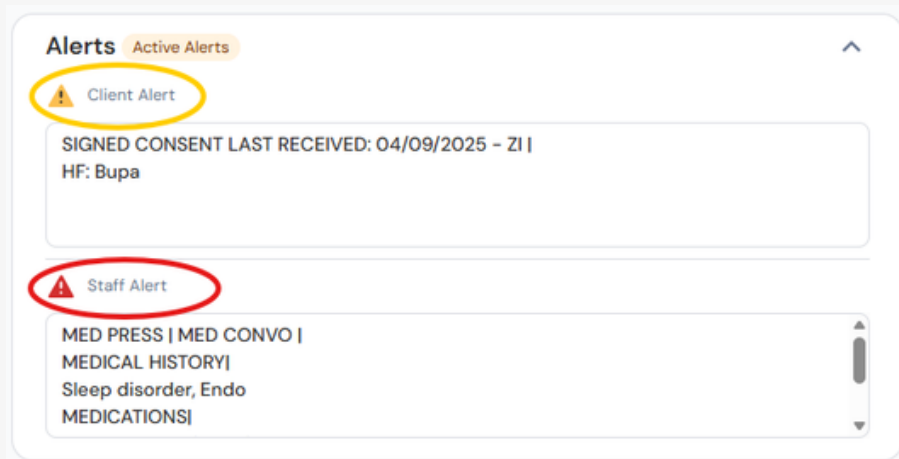
To enter client information into MindBody, go to the client's account and select the CLIENT INFO tab.

YELLOW ALERTS will contain whether we have received consent for treatment including treatment specific consent.

In the YELLOW ALERTS box, you can use the following as a template:

YELLOW ALERT TEMPLATE

SIGNED CONSENT LAST RECEIVED: (DATE ON FORM) - (YOUR INITIALS) |
HF: (HEALTH FUND ON FORM OR "nil" if none)



RED ALERTS will contain information for therapists or any important information for reception (e.g. needing a downstairs room, specified contact preferences, MALC History, oil allergies, etc).

In the **RED ALERTS** box, you can use the following as a template, inputting the corresponding information from the client's completed form.

RED ALERT TEMPLATE

PRESS | CONVO |
MEDICAL HISTORY|

MEDICATIONS|

OTHER RECENT
TX/INVESTIGATION|

TREATMENT GOALS|



OPENING A CLINIC

When you are the first person to arrive at a clinic you will need to unlock the front door, deactivate alarms, turn on lights and aircon. Sometimes a therapist or management will arrive at the clinic before you do, so they may have already completed the above.

DOORS: If you are first to arrive at a clinic you will need to unlock the front door. Keys are located in lock boxes at different locations at each clinic. A code is required to unlock each lock box (management will provide). It is important to put/lock key back in the lock box once you have unlocked and opened the front door.

ALARMS: Once you have unlocked the front door, you will need to deactivate the alarms immediately (management will provide you with alarm code for each clinic).

LIGHTS & AIRCON: Once you have deactivated alarms, turn on lights and aircon around the main areas of the clinic.

You will then proceed with the rest of your opening tasks, as per the DAILY TASK SHEETS.



CLOSING A CLINIC

If you are the last receptionist to leave for the day, at the end of your shift you are responsible for closing up the clinic.

LIGHTS/AIRCON: Turn off unused aircons and lights.

COMPUTER: Shut down the reception computer/ones that are not in use.

DOOR: You must also lock the front door as you leave and return the key to the lock box.

Clients and therapists will still be able to leave the clinic once you have locked the door, however it ensures that no one can enter the clinic once the receptionist has left for the day. You do not need to set the alarms. The last therapist to leave the clinic will do this when they leave.

EOD CASH UP

At the close of every shift you will need to conduct the 'EOD Cash Up' process which includes settling the terminals and making sure that we are balanced in MindBody.

Firstly, check the 'Status' mode of the MindBody diary and make sure that payment has been taken and processed for all appointments. This includes Late Cancells and Missed Appointments. All relevant appointment types should be blue. If you have missed anything, you will need to go back and retail them.

Now you will need to complete a 'Pre-Settle' to make sure that we are balanced.

COMPLETING A 'PRE-SETTLE'

Separate your receipts into Credit/EFTPOS and HICAPS piles to prepare for cash up.

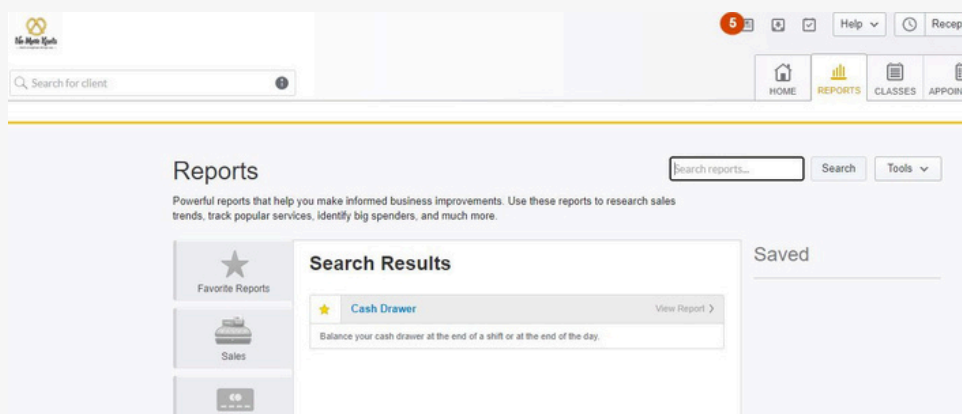
On the HICAPS machine, select 'Settlement' --> NAB --> "Pre-Settlement"

On the 'Pre-settle' receipt there will be a total value for eftpos/credit transactions. We want to make sure that the total value on these receipts match what we have recorded in MINDBODY.

*****Do not complete a Settlement until you are actually ready to settle for the day. By pressing 'Settlement', the terminal will process and finalise all transactions it has made for the day, and set itself up for a new day.*****

In MindBody

Go to INSIGHTS --> REPORTS --> "Cash Drawer" Report



Make sure the current date is selected for the start and end dates, and select the relevant clinic that you are working at. Hit 'GO!' to generate the report.

This report will show you the names and amounts for every transaction that has been recorded on the date and clinic location that you have chosen.

Scroll to the bottom of the report where you can view the totals.

Grand total	Payment Method	Cash	Check	Credit	HICAPS	EFTPOS	Credit Card	AMEX	Direct Debit	SpaFinder Wellness Card	Other	Total
		\$0.00	\$0.00	\$0.00	\$802.20	\$70.70	\$1,598.25	\$21.00	\$0.00	\$0.00	\$0.00	\$2,492.15

to check to see if you are balanced, you will need to make sure the total eftpos/credit amount on your 'Pre-settle' receipts match the total recorded for Eftpos and Credit Card in MindBody.

*****Remember, Greeny has up to 2 terminals you will need to add up, while Taringa and Newmarket only have one*****

To put it simply:

Pre-settle total/s = MindBody EFTPOS/Credit Card total

You will also want to check that the cash amount recorded matches the cash payments you have taken that day, and your HICAPS amount matches the HICAPS transaction report on the terminal.

ON THE TERMINAL

Go to SETTLEMENT --> HICAPS --> TODAY'S TOTALS --> ALL PROVIDERS --> PRINT

The HICAPS settlement receipts are divided into the total rebates processed per fund for each provider.



Highlight the total amount at the bottom of each provider section. You'll need to add all of these total's together to get your expected HICAPS total. To check to see if you are balanced, you will need to make sure the total HICAPS settlement amount matches the total recorded for HICAPS in MindBody.

Make amendments to any errors with the sales that you find.

Once you have balanced your CASH, CC/EFTPOS, and HICAPS amounts you are done and can proceed with closing out the sales for the day and printing your EOD report.

COMPLETING A 'CLOSE-OUT'

Once we have made sure that we are balanced for the day we can proceed with the final close out.

You can now settle the terminals so we can print of our 'Settlement receipts'.

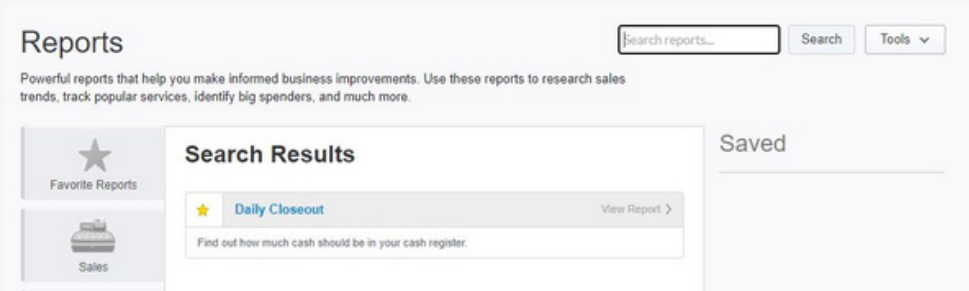
On the HICAPS machine, select 'Settlement' --> NAB --> Settlement

Let the terminal print of the receipt and select 'YES' when prompted to print off the full TXN listing. Fold these receipts neatly and set aside with our other divided receipts.

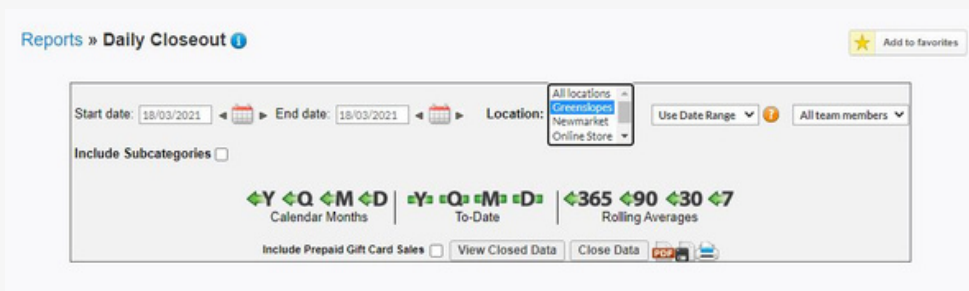
Print of the full TXN listing for today's HICAPS totals (if you don't already have a current copy). Fold these receipts neatly and set aside with our other divided receipts.

In MindBody

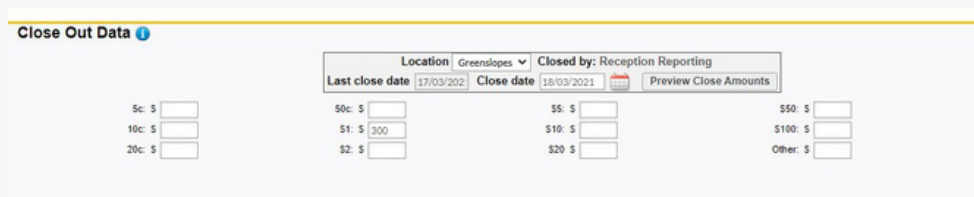
Click on the reports option available at the top of the screen. Search and select the "Daily closeout" Report.



Make sure the correct date is selected, as well as the appropriate clinic location. Then select 'Close Data'.



in the '\$1' cash box you will need to enter in the total amount of cash from both the till plus whatever was received that day in cash payments.



For example: If \$105 was received that day in cash payments, and we have a till balanced at \$600 then you would write 705 in the \$1 box (\$600 + \$105). If no cash payments were received then you would write \$600.

Once done, select 'Preview Close Amounts'.

Where it says 'amount to keep in drawer' enter the total amount left in the Till after the cash payments that were received have been removed. This is the pre-set amount that you are always wanting to balance the till at.

Scroll to the bottom and hit '**Close Out**' when you are done. This will save our close procedure in MindBody. Once completed, you can close MindBody.

Tips paid out:	\$0.00
Other tips:	\$0.00
Total cash expected in drawer:	\$300.00
Actual cash counted in drawer:	\$300.00
Over/Short amount:	\$0.00
Amount to keep in drawer:	<input type="text" value="\$300.00"/>
Cheque/Invoice Payment sales:	\$0.00
Actual cheque amount:	<input type="text" value="\$0.00"/>
Over/Short amount:	\$0.00
HICAPS	
HICAPS sales:	\$802.20
EFTPOS	
EFTPOS sales:	\$70.70
Credit Card	
Credit Card sales:	\$2,031.25
AMEX	
AMEX sales:	\$21.00

Staple each separate stack of receipts (CREDIT/EFTPOS//HICAPS) and the folded 'Settlement receipts' NEATLY to the front of a blank bit of paper. Hole punch the page if necessary to put in our Monthly EOD Folder.



Staple the stacks with 1 - 2 staples in the middle so it is possible to still flick through them and view the details of the receipts.

Write the date and your initials, along with the status of the EOD report. If we are balanced, write 'Balanced'

If we are not balanced write 'Unbalanced' with a brief note of why.

****Be sure to email management for any reason that the report may be unbalanced****

Once completed, file this in the appropriate EOD folder.

WHAT TO DO IF YOUR 'PRE-SETTLE' DOESN'T BALANCE

If your settlement receipts do not match the amounts you have reported in MINDBODY we will need to try and find the incorrect payment and amend this.

COMMON CAUSES FOR ERRORS:

1. Transaction / purchase was made through the terminal but not processed through MINDBODY
2. Transaction / purchase was assigned to the incorrect clinic location in MINDBODY
3. The incorrect payment method was assigned in MINDBODY
4. The incorrect amounts were assigned in MINDBODY

You should do multiple Pre-settlements throughout the day. If you complete a pre-settlement halfway through your day and find that everything was balanced, and then conduct another pre-settlement at the end of the day but discover an issue; you can be certain that all payments that were processed before the first pre-settlement are correct. You may only need to review the transactions that followed.

If you find that you are NOT balanced, you firstly need to determine:

1. Is the issue with Health fund payments, or card payments, or Both? This may give you a clue as to what the issue may most likely be.
2. Have you reported more or less in MINDBODY than what the settlement receipts are saying?
 - a. If you have reported LESS in MINDBODY then the issue may likely be that something has not been retailed, or has not been retailed to the correct clinic
 - b. If you are reporting MORE in MINDBODY then you may have your amounts mixed up, or have assigned an incorrect payment type to one of the transactions.

Once you have worked out the AMOUNT you are missing or have not accounted for correctly, AND which payment method has been affected, you will need to check all receipts for that method against what we have entered via the cash drawer report.

When you have identified the incorrect entry, you will then need to amend it.

AMENDING PAYMENT ENTRIES

METHOD 1: AMENDING THE ORIGINAL SALE

If you need to change:

- The sale date
- The sale location
- The payment method used (unless ACCOUNT was used in the original sale)
- Or add notes to the receipt (such as the Therapist's provider information)

Then you can just do a quick edit of the sale.

To do this:

1. Go to the client's profile
2. Go to the PURCHASE section
3. Select the sale ID of the incorrect purchase
4. Select EDIT SALE

From here you can apply the above edits to the sale.

Edit Sale

Sale ID	476103
Client:	Emma Murdoch
Change Client:	
Lookup client by	All fields <input type="text"/> <input type="button" value="Search"/>
Sale Date:	17/02/2024
Location:	Taringa <input type="text"/>
Rep	Not Assigned <input type="text"/>
Payment Method 1	HICAPS <input type="text"/>
Notes:	Monica La ANTA 22867
Payment Method 2	EFTPOS/Credit Card <input type="text"/>
Notes:	<input type="text"/>
Sale Items	
Description	Price
1hr Remedial Massage (RMT)	\$51.50
Weekend/PH Surcharge	\$2.75

You cannot make changes to the purchase amounts, amount of payment methods, or payment method if account was used with this method.

METHOD 2: RE-ASSIGN PAYMENT

When you need to make a change to:

- 1.The amount allocated for each payment method
- 2.The number of different payment methods used
- 3.Change the payment method if ACCOUNT was used

Then you will use the 're-assign Payment Method'.

You are not able to VOID any payments that are attached to a service. With this method, we will be swapping a correct payment with the incorrect on in order to separate it from the service so it can be voided. You do not need to delete the appointment to make any of these changes.

- 1.Go to the RETAIL SCREEN/POINT OF SALE with the client's profile
- 2.Create a brand new sale for the service with the correct payment methods / amounts. Save.
- 3.Go to the ACCOUNT DETAILS section in the client's profile. You should see the service you just completed under AVAILABLE FOR USE
- 4.Find the line for the treatment in question. Go along the line and find the ACTIONS column. Click on the 3 dots and click SHOW VISITS.
- 5.Find the dropdown box under REASSIGN PAYMENT. Select the option that appears displaying the correct sale you sold. Confirm this change.
- 6.Go back to ACCOUNT DETAILS. You should see green credit sitting as an available pricing option. This should now be the incorrect sale that we just swapped out. Now that it is not attached to the treatment, we can void it.
- 7.Go back to ACCOUNT DETAILS the incorrect sale should now be under AVAILABLE FOR USE.
- 8.Click the 3 dots under the ACTIONS column. RETURN/VOID. Confirm VOID.

This method will only work if the service and therapist has not changed. If you need to make changes to the service or therapist that was booked, you will need to remove the appointment from the diary and rebook it correctly.

METHOD 3: DELETING THE APPOINTMENT

Only use this method if we actually need to make a change to the service that the client is booked under.

For example, the appointment was charged and processed at an hour but then was shortened to 45mins, or a standard appointment was retailed and it actually needed to be myotherapy or pregnancy ect.

It is super important when we do this that we copy out any SOAP note that a therapist has begun or finished so we can paste it back into the new appointment that we create. Therapists won't be too happy with us if we delete all their work!

If you need to use this method:

1. Copy out the therapist's SOAP note into a word document
2. Delete the original appointment
3. Go to the client's 'Account Details' in their profile and void the payment
4. Book the correct service type in under the client's name – Don't forget that you can opt out of sending the client booking confirmations when we do this!
5. Retail the appointment
6. Paste back in the SOAP note correctly

DEALING WITH A DISGRUNTLED CLIENT

This is always a situation which needs to be handled with great care. Always remember when you do a favour for a client they may tell 1 or 2 people, when you handle a situation not to their liking and they turn out extremely unhappy they will tell on average 10 people!

When speaking to a disgruntled customer it is important to remember to remain calm and passive, don't retaliate and fuel the conversation. Listen to what they have to say as often disgruntled customers just want to be heard. Wait until they have finished, and respond confidently, but with empathy.

Here are some important phrases to say in situations that may arise

IF SOMEONE CAN'T GET IN TO SEE THEIR REGULAR THERAPIST

*"I can understand your frustration I know it is hard to get into see (**particular therapist**) but we have other therapists on board to ensure that we can get you in for a massage. They have the same qualifications as (**therapist**). What we can do is book you in with them and look for an appointment with (**preferred therapist**) and put you on the cancellation list so that if anything does become available we can get you in with them."*

IF SOMEONE HAS COME TO THE WRONG CLINIC

*"Your appointment is at the (**clinic**) clinic today, were you told this yesterday when (receptionist) did your reminder call?"*

"Did you receive your reminder notifications? These should also notify you of the location your appointment is booked at"

*"Are you familiar with the (**clinic**) clinic?"*

*"I will call the (**clinic**) immediately and let them know that you are on your way!"*

IF SOMEONE HAS COME TO THE WRONG APPOINTMENT

*"We have you booked in for (**the appt time/date**) Did you get your reminder yesterday? Do you have your appointment card or reminder notifications?"*

****Try and reschedule them for the soonest possible time that suits them if need be****

IF SOMEONE ARRIVES THINKING THEY HAVE AN APPOINTMENT BUT NOTHING IS BOOKED

*"I don't seem to have you booked in for an appointment. Did you do this online or over the phone with one of our team (**check that this is not an error on our end!**) Did you receive an appointment confirmation when you made your booking? You should always receive a confirmation from us when a booking has been made, and we do encourage clients to call us if they don't receive one."*

****Try and reschedule them for the soonest possible time that suits them****

WHEN DEALING WITH A DISGRUNTLED CLIENT, TRY TO REMEMBER:

1. Body Language

Ensure that your body language stays positive. Try to remain relaxed and open and ensure you don't take on defensive gestures for example, folding your arms, frowning or rolling your eyes.

2. Listen

Listen to what the client is saying, don't be distracted or uninterested. Give them your full attention. The client is taking the time to discuss an issue that has upset them and they deserve your time and attention.

3. Check for Understanding

Show that you have heard what they said by repeating, rephrasing and clarifying. Show genuine care and understanding

4. Be Positive

Don't become defensive and don't take anything they say personally.

5. Empathise without sides

Empathise with their situation but do not berate or belittle the business, or staff member involved in the incident whilst doing so.

6. Their desired resolution

To ensure you are not throwing offers at the client that they really don't want, always ask the client what they would like to see happen.

7. Explain your Actions

Tell the customer what you are going to do to follow this up

8. Anything Else?

Always ask the client if there is anything else you can do to help them.

IF YOU CAN'T REACH A SOLUTION ON THE SPOT

If you have done all you can for the client and they are still not happy, you must refer them to a manager.

If there is a manager in the clinic, let the client know that you will get in contact with them. If you can, take yourself to the manager to explain the situation, that would be ideal circumstance. If not, remove yourself from the client's presence and call the manager from another room. Explain to the manager what the concern is and what you have tried to do to rectify it.

If there is not a manager in the clinic at the time, please take the time to record all details involving the concern and email them directly to ensure that a manager can follow it up when they are in the clinic next.

DEALING WITH A CLIENT COMPLAINT

In your position as the first point of contact for our business, you will often be the first to hear and handle a client complaint. Clients who have had a less than satisfactory experience at our business with often be uncomfortable to say something in person and may turn to email or call us later, after the fact. In either case, it is your job to be kind and assure the client we will do all we can to resolve the issue.

IF A CLIENT EMAILS WITH A COMPLAINT AND/OR POOR FEEDBACK ON AN EXPERIENCE THEY HAVE HAD:

Respond promptly, saying that we are disappointed to hear that they have had such an experience with us. Assure them that you have passed this on to the appropriate manager to review and they will be in contact with them as soon as possible to discuss further.

IF A CLIENT CALLS WITH A COMPLAINT AND/OR POOR FEEDBACK ON AN EXPERIENCE THEY HAVE HAD:

Remain calm and passive, don't retaliate and fuel the conversation. Listen to what they have to say and respond with kindness and empathy. Often the client will calm down after they feel they are being heard. Take notes in as much detail as possible, and ask questions for further information if appropriate. Assure the client that you have made notes of their feedback, thank them for the time they took to call through and explain their experience, and assure them that you will pass the information along to the appropriate manager to review and they will be in contact with them as soon as possible to discuss further. Let them know that as a client they are a priority to us and we want to do what we can to make them feel better about their experience.

IF A CLIENT COMPLAINS IN PERSON:






Treat the situation the same as if they were on the phone. Listen. Take notes. Respond with kindness and empathy. If a manager is onsite, see if they are available to speak with the client in person. If a manager is not available, assure the client that you will pass the information along to the appropriate manager to review and they will be in contact with them as soon as possible to discuss further.

LATE CANCELLATION AND MISSED APPOINTMENT POLICY

The cancellation of appointments can be frustrating and have a large effect on both the clinic and therapists if not controlled. Our appointment policy is designed to encourage clients to either attend their appointment or give adequate notice ahead of time.

Our appointment policy is available in clinic, on our website, and our client consent forms. It states:

APPOINTMENT POLICY

-  If you need to postpone or cancel your appointment, we require at least **4 BUSINESS HOURS NOTICE**.
-  If you cancel or postpone your appointment within 4 business hours you will be charged **25% of the total appointment cost**.
-  If you do not show to your appointment you will be charged **50% of the total appointment cost**.
-  If you are late to your appointment, you are still liable to pay the full cost for the appointment time that was reserved.
-  If you regularly do not show to your appointment, you may be asked to pay a non-refundable deposit for future bookings before they are accepted. Failure to pay appointment deposits will result in your appointment being cancelled

We understand that sometimes life gets in the way and you may be unable to attend your appointment. No matter how soon or far away your appointment is, if you are aware that you may be unable to attend please call us to reschedule.

****CONFIRMATION MESSAGES ARE SENT 2-DAYS PRIOR TO APPOINTMENTS, AND UNCONFIRMED APPOINTMENTS ARE CONTACTED DIRECTLY VIA PHONE THE DAY BEFORE. UNCONFIRMED APPOINTMENTS ON THE DAY ARE AT RISK OF BEING CANCELLED****

Reception and therapists have the authority to waive the cancellation fee if they believe the client has a valid reason. We ask that you consider all aspects of the client's need to cancel/reschedule their appointment, and determine whether or not it is appropriate for a fee to be charged.

If a therapist would like to request waiving the fee for their client, it is up to the therapist to come to reception directly ahead of time to discuss this.

Enforcing our appointment policy isn't solely about fee collection; it's about nurturing positive relationships with our clients and emphasizing the importance of mutual respect for our business and our team's time.

LATE CANCELLATIONS

Late cancellations are when we receive notice within 4 BUSINESS hours of an appointment that the client wishes to cancel. This includes moving the appointment to later on the same day if the original appointment is within our 4hr window.

Phone Scripting Help

Listen to the client as they give an explanation for needing to cancel. Be empathetic & kind no matter what! As the client is talking, check their profile notes and visit history to see if there is a history of previous cancellations and missed appointments.

If a client does not originally offer an explanation for needing to late cancel, you could say:

“I’m happy to assist you with changing your appointment if that’s required; however, as this is within our appointment policy, I do need to ask the particular reason for this change. Are you able to share the reason you are unable to make your original appointment today?”

We have had situations where a client has called to cancel with no particular reason, and upon being reminded of our appointment policy have chosen to keep the original appointment so it’s always worth having this discussion!

Once you have enough information regarding their reason for cancelling, we can make a decision around whether or not it is appropriate to charge in this instance.

While as a general rule it is important to remind clients of our cancellation policy in the event of a late cancellation, please be mindful that that there may be situations where it’s not appropriate to do so.

For example: *A client calls us to cancel their partners appointment as they have gone into labour and they are on their way to the hospital. You can just thank them for the call and wish them well!*

Charging Fees

IF IT IS AN INITIAL CLIENT

Regardless of the reason, if it is an initial client and their first time late cancelling, we will give them a warning / reminder of our appointment policy. This is because we do not have an established relationship with the client yet, and what to encourage the opportunity for them to come back to the clinic!

Once you have rescheduled their appointment, you could say:

“As this would have been your first visit to our clinic we are happy to waive the fee for you on this occasion, but I do need to take this opportunity to advise you of our appointment policy.

We normally require a minimum of 4 BUSINESS hours notice to make any changes to appointments or there is a fee of 25%. We just ask in future that you attempt to give us as much notice as possible next time you may need to reschedule.”

IF IT IS AN EXISTING CLIENT

If an existing client calls to cancel within our appointment policy, the decision to charge the fee will be determined by the circumstances around the cancellation. Even if it is their first time, we can charge if the situation warrants it.

If you are charging the client, **always attempt to collect the fee over the phone.** Unless the client is a VIP with weekly bookings and volunteering to pay the fee, it is very unlikely that they will remember and make any effort to pay this if it is just put on their account "for them to pay at their next visit". From an accounts perspective, we also do not want an on-going list of clients with outstanding balances in our system as this makes it look like we have significant debt outstanding that needs to be collected.

If needing to collect a fee, you could say:

"Considering the circumstances, there is a fee for your late cancellation today. Are you able to fix this up with me over the phone now?"

If the client is upset in any way about your decision, you could say:

"I understand that you are upset by this decision; however, our appointment policy is in place to ensure our team's time is respected. Had we had more sufficient notice to make a change to your appointment, we would have been able to offer your spot to one of our other clients."

We do not expect you to fight clients to pay for fees! Make sure that you always stay polite and respectful with your tone and manner when communicating with a disgruntled client. It is really easy to get rattled when someone gets aggressive with their words and language, but do your best not to take it personally!

Remember, enforcing our policy is about ensuring that the clients we look after are respectful of our team's time! Make sure you are confident that the circumstances warrant the fee charged, and if a client is refusing to pay that's fine! We do not want to encourage clients to return to our clinic if they do not value our services or our team.

If a conversation is escalating at any point, you could say:

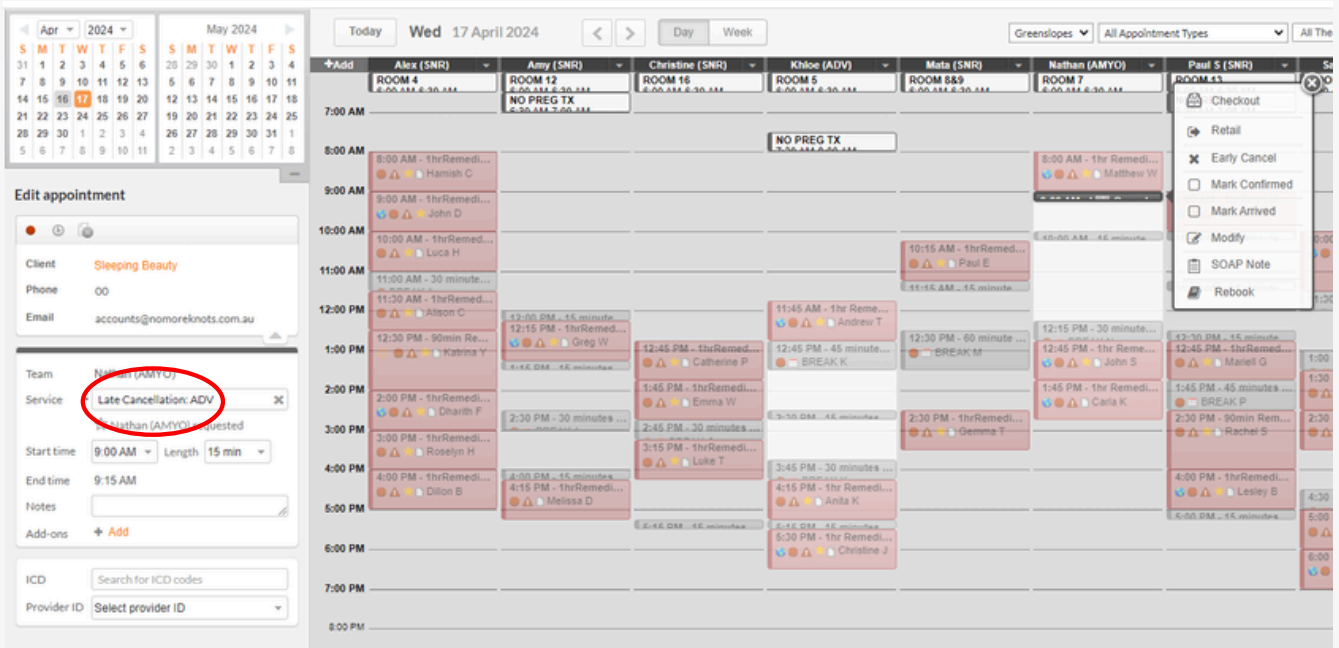
"I appreciate that you are not in agreement with the policy that I am following with you. I think its best if you and I leave this conversation here, and I'm going to pass all this information along to my manager and they will be in contact with you to discuss this further. Is there an appropriate time for them to call you today/tomorrow?"

PROCESSING A LATE CANCELLATION IN MINDBODY

Regardless of whether or not we are charging a fee, you will always record a late cancellation in MINDBODY for reporting purposes, and for an accurate visit record on the client's profile.

Step 1 . CHANGE THE APPOINTMENT TO A LATE CANCELLATION

We do not cancel appointments that have been late cancelled, as we want to keep a record of this occurrence. Instead, we change the service type of the appointment to a LATE CANCELLATION which will show up as a 15min session.



As 1hr is our standard appointment time, the following late cancellation services are calculated at 25% of the cost of our 1hr appointments:

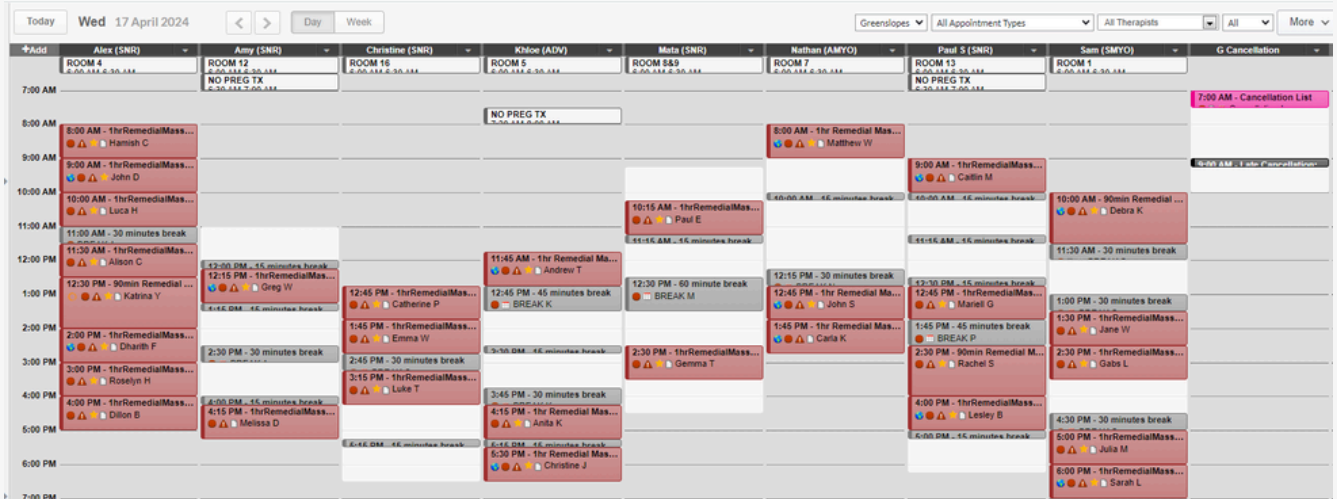
- LATE CANCELLATION: GMT
- LATE CANCELLATION: RMT
- LATE CANCELLATION: SNR
- LATE CANCELLATION: ADV

If the original appointment is longer or shorter than 1hr, you will need to change the service to LATE CANCELLATION: CUSTOM AMOUNT and calculate the cost manually.

THE DEFAULT BOOKING TIME OF OUR MALC SERVICES IS 15MINS FOR REPORTING PURPOSES. PLEASE ENSURE THAT THIS BOOKING TIME REMAINS AS A 15MIN BLOCK. DO NOT EXTEND OR SHORTEN THIS

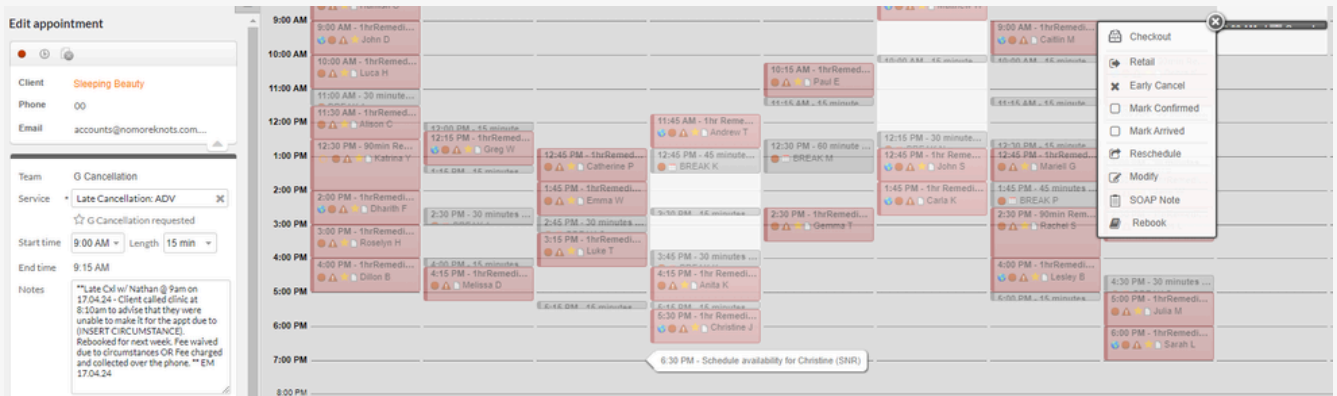
Step 2 . MOVE THE APPOINTMENT FROM THE THERAPIST'S DIARY TO THE CANCELLATION COLUMN

We want to remove the appointment from the therapist's diary to free the appointment space up for another booking. We also want to see all our MALC appointments under our cancellation column for reporting purposes. Where possible, move the appointment across to line up with the start time of the original appointment. You may need to open up availability on the diary to do this.



Step 3 . WRITE YOUR MALC NOTE ON THE APPOINTMENT

We keep a record of when the late cancel took place, who with, reason, charge, ect. This should all be recorded on the appointment so all of this can be seen from the diary directly.



LATE CANCEL NOTE TEMPLATE:

****Late cxl w/ THERAPIST NAME @ TIME OF ORIGINAL APPT on DATE - WHAT HAPPENED/WHEN & HOW THE CLIENT CONTACTED TO ADVISE. WHAT WERE THE REASONS GIVEN. DID THEY REBOOK? WAS THE FEE CHARGED OR WAIVED? WHY? ANY ADDITIONAL FOLLOW UP REQUIRED?** RECEPTION INITIALS & DATE**

Step 4. COPY THE MALC NOTES TO THE CLIENT'S FILE

We want to keep a record of the full MALC history and events in the client's file. Copy your completed MALC note into the 'NOTES' section of the 'CLIENT INFO.' page. Always copy the most recent note at the top.

Step 5. RETAIL THE APPOINTMENT

All MALC appointments must be retailed. Once retailed, the late cancellation will show up in the client's visit history. Click on the appointment and follow the retail process, just like you would with a standard appointment.

If we are charging a the fee and have successfully collected payment over the phone, you will process this as an EFTPOS/CREDIT CARD payment (See above image).

If we have been unable to collect the fee at the time of the call, you would retail this using ACCOUNT so the fee is recorded as a negative balance. Ensure there are adequate notes supplied in the MALC note and running email advising on when we are expecting payment from the client and additional follow up required on our end. You need to ensure all steps you have actioned are very clear from your notes, and that you set the rest of the team up for success in handling future conversations with this client.

If we are waiving the fee, you will discount the price of the appointment to match the fee charged in order to zero out the fee amount (see below). Alternatively, you could also zero out the price.

Point of Sale

More ▾

Search for the client making a purchase

Open Tickets

SLEEPING BEAUTY Assign Gift Card Current series: None

TICKET Greenslopes ▾ 16/04/2024

-- No Items Selected --

Subtotal: \$0.00 Discount: \$0.00 Grand Total: \$0.00 incl. tax of \$0.00

Add Item

Services for Sleeping (0 Paid / 1 Total) 17/04/2024

Item Name	Price	Qty	Discount	Amount
9:00 am FEES Late Cancellation: ADV w/G Cancellation				
ADV 1hr Late Cancellation Fee	30.50	1		30.50

Total \$0.00

Once the item has been added to the cart, use CREDIT JOURNAL as the payment method. In the notes write **“Fee waived due to circumstances - YOUR INITIALS & DATE”**

Point of Sale

More ▾

Open Tickets

SLEEPING BEAUTY Assign Gift Card Current series: None

TICKET Greenslopes ▾ 16/04/2024

Item name	Qty	Price	Discount	Total
ADV 1hr Late Cancellation Fee	1	\$30.50	100.00%, \$30.50	\$0.00

PROMOTION CODE

Subtotal: \$30.50 Discount: -\$30.50 Grand Total: \$0.00 incl. tax of \$0.00

Payment Info

SELECT A PAYMENT METHOD

Credit Journal
(Fee waived due to circumsta)

Complete the Sale

It is expected that if you are handling the late cancellation, that you would complete all steps in this process. Try to avoid leaving steps for someone else to pick up later!

MISSED APPOINTMENTS

Missed appointments are considered more serious as we have received little to no-notice of a client being unable to attend their appointment. Any notice from <10mins before the start of the appointment time, up to and including into the appointment itself is considered a missed appointment. For example, if a client has an appointment at 12pm and calls at 11:55am, this is considered a missed appointment, not a late cancellation, as we advise that clients arrive early to their appointment in order to ensure adequate time for parking, check in, updating forms etc.

WHAT TO DO WHEN A CLIENT HAS NOT ARRIVED FOR AN APPOINTMENT DURING THE DAY

Give the client a call approximately 5mins into the appointment start time. If it goes to voicemail, please leave a message and follow up with a text.

SCRIPT FOR VOICEMAIL:

“Hi ____, it's ____ from NMK. I'm just calling to see if everything is okay as we had you booked in for an appointment with (therapist) at (time/location) today. We just want to make sure you are still on your way, so if you could please give us a call back and let us know that would be greatly appreciated. We hope to hear from you soon!”

SCRIPT FOR TEXT:

Hi ____, No More Knots here! We had you scheduled in today for a treatment with (THERAPIST) at (TIME), and were just checking you were still making your way into clinic? Please give us a call on (Clinic Phone Number) when you get this message. - Kind regards, NMK Reception Team.

Touch base with the therapist and let them know what efforts you have made. Wait another 10mins, (approximately 15mins into the appointment start time). If we have not received a call back from the client, send the following text message:

SCRIPT FOR SECOND TEXT MESSAGE:

Hi ____. As it is now (CURRENT TIME) and we have not heard back from you we are considering this session today a missed appointment. We do hope everything is okay! Please give us a call on (Clinic Phone Number) when you get this message in order to reschedule. - Kind regards, NMK Reception Team.

Once you have sent this, we are now free to try and fill what we can remaining of that appointment time. Check in with the therapist! They may wish to see if their next client can come in earlier, or they may wish to duck out of clinic and/or have a longer break :)

CHARGING A MISSED APPOINTMENT FEE

With the exception of an initial appointment's first MALC, we will always assume we are charging on a missed appointment until we hear back from the client and are advised of a good enough reason to waive the fee.

If the client does call back and any stage in the process above or throughout the day, you will handle these conversations in a similar manner to a late cancellation.

- Listen to the client's explanation
- Offer to reschedule / rebook if appropriate
- Enforce / collect the fee over the phone (if appropriate) or advise that based on the circumstances we are happy to waive the fee

If we are enforcing a fee but the client doesn't agree to pay, follow similar steps for how you would handle this with an unhappy late cancellation fee and get support from management.

We will not accept future bookings from clients who miss appointments, and are not respectful of our appointment policy.

MISSED APPOINTMENT EMAIL

By the end of the day, if a client is not called us back we will send them an email. We want to give them an opportunity to return our voicemail and original text messages, so send an email during our PRE-CLOSE phase of the day - around the time when we action our 2nd stage of confirm messages.

SCRIPT FOR EMAIL - INITIAL CLIENT (WAIVING FEE):

Hi **[CLIENT NAME]**,

We hope all is well with you? We missed seeing you today **[DATE]** at our **[CLINIC LOCATION]** Clinic for your treatment with **[THERAPIST]**. We did... ***[INSERT SPECIFICS AROUND APPOINTMENT AND THE EFFORTS WE HAD MADE TO CONTACT THEM]*** We did also attempt to contact you when you did not arrive today. We hope everything is okay!?

****EXAMPLE:** We had confirmed this appointment with you over the phone yesterday / We did have you confirmed for this appointment as you had responded to our automatic messages. / We made several attempts to contact you in the lead up to this appointment in order to confirm this with you./ **

As this would have been your first visit to our clinic, we are happy to waive the fee on this occasion. As a courtesy, we also wanted to remind you of our cancellation policy.

- If you need to postpone or cancel your appointment, we require at least 4 BUSINESS HOURS NOTICE.
- If you cancel or postpone your appointment within 4 business hours you will be charged 25% of the total appointment cost.
- If you do not show to your appointment you will be charged 50% of the total appointment cost.
- If you are late to your appointment, you are still liable to pay the full cost for the appointment time that was reserved.
- If you regularly do not show to your appointment, you may be asked to pay a non-refundable deposit for future bookings before they are accepted. Failure to pay appointment deposits will result in your appointment being cancelled

We understand that sometimes life gets in the way and you may be unable to attend your appointment. No matter how soon or far away your appointment is, if you are aware that you may be unable to attend please call us to reschedule. We really value our therapist team, their time & all of our clients, so we hope you understand we have to have a cancellation policy to respect this.

If you have any questions or concerns, please give our team a call on **[CLINIC PHONE NUMBER]**. We look forward to speaking with you soon!

Kind regards,

INSERT EMAIL SIGNATURE

SCRIPT FOR EMAIL - FEE IS BEING CHARGED:

Hi **[CLIENT NAME]**,

We hope all is well with you? We missed seeing you **[Today / Yesterday]**, **[DATE]**, at our **[CLINIC LOCATION]** Clinic for your treatment with **[THERAPIST]**. We did... ***[INSERT SPECIFICS AROUND APPOINTMENT AND THE EFFORTS WE HAD MADE TO CONTACT THEM]*** We did also attempt to contact you when you did not arrive today. We hope everything is okay!?

****EXAMPLE:** We had confirmed this appointment with you over the phone yesterday / We did have you confirmed for this appointment as you had responded to our automatic messages. / We made several attempts to contact you in the lead up to this appointment in order to confirm this with you./ **

As we did not receive any notice from you that you were going to be unable to attend this appointment, there will be a fee of **[\$FEE AMOUNT]** which we would appreciate your assistance in fixing up at your earliest convenience. You can do this by contacting the clinic and making payment over the phone.

As a courtesy, we also wanted to remind you of our cancellation policy.

- If you need to postpone or cancel your appointment, we require at least 4 BUSINESS HOURS NOTICE.
- If you cancel or postpone your appointment within 4 business hours you will be charged 25% of the total appointment cost.
- If you do not show to your appointment you will be charged 50% of the total appointment cost.
- If you are late to your appointment, you are still liable to pay the full cost for the appointment time that was reserved.
- If you regularly do not show to your appointment, you may be asked to pay a non-refundable deposit for future bookings before they are accepted. Failure to pay appointment deposits will result in your appointment being cancelled

We understand that sometimes life gets in the way and you may be unable to attend your appointment. No matter how soon or far away your appointment is, if you are aware that you may be unable to attend please call us to reschedule. We really value our therapist team, their time & all of our clients, so we hope you understand we have to have a cancellation policy to respect this.

If you have any questions or concerns, please give our team a call on **[CLINIC PHONE NUMBER]**. We look forward to speaking with you soon!

Kind regards,

INSERT EMAIL SIGNATURE

FINAL CLIENT FOLLOW UP

The next business day, if we have still not had any response from the client will give one last courtesy call to check in. If you get voicemail, leave a message. At this point, if we have still not had a response from the client or an opportunity to speak with them over the phone we would leave this here and do not need to continue chasing. The fee can remain on the account for now and will be flagged if the client makes an attempt to book an appointment in the future.

SCRIPT FOR FINAL VOICEMAIL:

“Hi _____, it's _____ from NMK. I'm following up one more time in regards to the appointment you missed with us yesterday. We have yet to hear back from you and wanted to make sure everything was okay. Please give us a call back when you can. We hope to hear from you soon”

THERE ARE SOME SLIGHT AMENDMENTS TO THIS PROCESS IF IT IS THE LAST CLIENT FOR THE THERAPIST OR THE LAST CLIENT OF THE DAY.

WHAT TO DO WHEN A CLIENT HAS NOT ARRIVED AND IS A THERAPIST'S LAST CLIENT OF THE DAY (NOT EOD DAY)

Give the client a call approximately 5mins into the appointment start time. If it goes to voicemail, please leave a message and follow up with a text.

SCRIPT FOR VOICEMAIL:

“Hi _____, it's _____ from NMK. I'm just calling to see if everything is okay as we had you booked in for an appointment with (therapist) at (time/location) today. We just want to make sure you are still on your way? You are (therapist)'s last appointment of the day so if you could please give us a call back as soon as you can and let us know that would be greatly appreciated. We hope to hear from you soon!”

SCRIPT FOR TEXT:

Hi ____, No More Knots here! We had you scheduled in today for a treatment with (THERAPIST) at (TIME), and were just checking you were still making your way into clinic? You are (therapist)'s last appointment of the day so please give us a call on (Clinic Phone Number) when you get this message. - Kind regards, NMK Reception Team.

Touch base with the therapist and let them know what efforts you have made. Wait another 10mins, At approximately 15mins into the appointment, if we have not received a call back from the client, send the following text message:

SCRIPT FOR SECOND TEXT MESSAGE:

Hi ____. As it is now (CURRENT TIME) and we have not heard back from you we are considering this session today a missed appointment. We do hope everything is okay. Please give us a call on (Clinic Phone Number) when you get this message in order to reschedule. - Kind regards, NMK Reception Team.

Once you have sent this the therapist is free to leave the clinic. Follow the rest of the missed appointment process as normal.

WHAT TO DO WHEN A CLIENT AT THE END OF THE DAY HAS NOT ARRIVED (CLOSE OF BUSINESS)

Give the client a call approximately 5mins into the appointment start time. If it goes to voicemail, please leave a message and follow up with a text.

SCRIPT FOR VOICEMAIL:

“Hi _____, it’s _____ from NMK. I’m just calling to see if everything is okay as we had you booked in for an appointment with (therapist) at (time/location) today. We just want to make sure you are still on your way? You are in our final round of appointments for this evening and the clinic will be closing in the next 10mins. If you could please give us a call back as soon as you can and let us know that would be greatly appreciated. We hope to hear from you soon!”

SCRIPT FOR TEXT:

Hi ____, No More Knots here! We had you scheduled in today for a treatment with (THERAPIST) at (TIME), and were just checking you were still making your way into clinic? You are in our final round of appointments for this evening and the clinic will be closing in the next 10mins. Please give us a call on (Clinic Phone Number) when you get this message. - Kind regards, NMK Reception Team.

Touch base with the therapist and let them know what efforts you have made. Wait another 10mins (this will now be close of business). If we have not received a call back from the client, send the following text message:

SCRIPT FOR SECOND TEXT MESSAGE:

Hi ____. The clinic is now closed for the evening and as we have not heard back from you, we are considering this session today a missed appointment. We do hope everything is okay. If you do call us now outside of business hours, please be sure to leave a message. We will follow up again tomorrow in order to reschedule. - Kind regards, NMK Reception Team.

Once you have sent this the therapist is free to leave the clinic and you can finish up the last of your close procedures as normal. For missed appointments that occur at the end of the day, the MALC email will be sent **AFTER** the FINAL CLIENT FOLLOW UP the next business day.

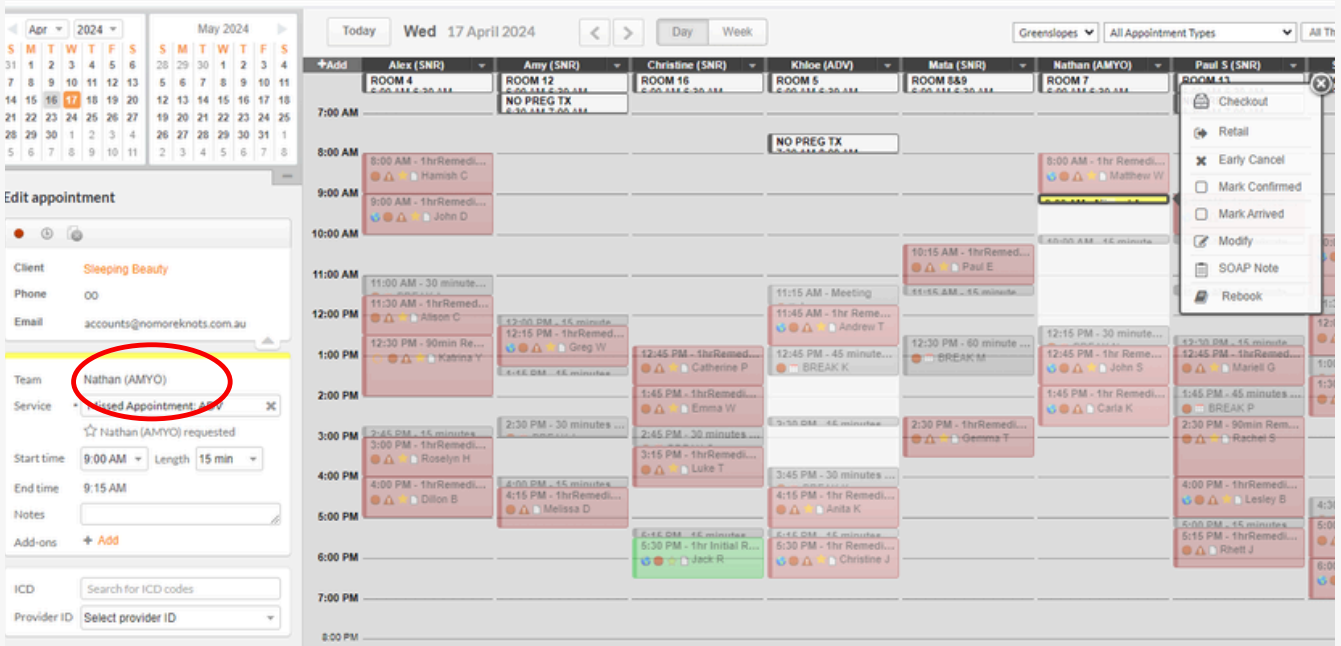
Missed appointments that occur at the end of the day will impact your ability to finish on the original rostered finish time. When this happens, please make sure to check in with your manager so we can ensure your shift finish is reflected correctly.

PROCESSING A MISSED APPOINTMENT IN MINDBODY

Regardless of whether or not we are charging a fee, you will always record a missed appointment in MINDBODY for reporting purposes, and for an accurate visit record on the client's profile.

Step 1 . CHANGE THE APPOINTMENT TO A MISSED APPOINTMENT

After you have made the steps to contact the client and confirmed that this is a missed appointment, change the service type of the appointment to a MISSED APPOINTMENT. This will show up as a 15min session.



As 1hr is our standard appointment time the following late cancellation services are calculated at 50% of the cost of our 1hr appointments:

MISSED APPOINTMENT: GMT

MISSED APPOINTMENT: RMT

MISSED APPOINTMENT: SNR

MISSED APPOINTMENT: ADV

If the original appointment is longer or shorter than 1hr, you will need to change the service to **MISSED APPOINTMENT: CUSTOM AMOUNT** and calculate the cost manually.

THE DEFAULT BOOKING TIME OF OUR MALC SERVICES IS 15MINS FOR REPORTING PURPOSES. PLEASE ENSURE THAT THIS BOOKING TIME REMAINS AS A 15MIN BLOCK. DO NOT EXTEND OR SHORTEN THIS

Step 2 . MOVE THE APPOINTMENT FROM THE THERAPIST'S DIARY TO THE CANCELLATION COLUMN

We want to remove the appointment from the therapist's diary to free the appointment space up for another booking. We also want to see all our MALC appointments under our cancellation column for reporting purposes. Where possible, move the appointment across to line up with the start time of the original appointment. You may need to open up availability on the diary to do this.

Room	Alex (SNR)	Amy (SNR)	Christine (SNR)	Khloe (ADV)	Mia (SNR)	Nathan (AMYO)	Paul S (SNR)	Sam (SMYO)	G Cancellation
ROOM 4	ROOM 12	ROOM 16	ROOM 5	ROOM 889	ROOM 7	ROOM 13	ROOM 1		
7:00 AM	NO PREG TX	NO PREG TX				NO PREG TX			
8:00 AM	8:00 AM - 1hrRemedi... Hamish C					8:00 AM - 1hr Remedi... Matthew W			
9:00 AM	9:00 AM - 1hrRemedi... John D							9:00 AM - Missed Appt.	
10:00 AM									
11:00 AM									
12:00 PM									
1:00 PM									
2:00 PM									
3:00 PM									
4:00 PM									
5:00 PM									

Step 3 . EDIT YOUR APPOINTMENT NOTES TO REFLECT OUR MALC NOTE FORMAT

Keep a record of the steps taken throughout the process. This should all be recorded on the appointment so all of this can be seen from the diary directly.

Client: Sleeping Beauty
Phone: 00
Email: accounts@nomoreknots.com

Team: G Cancellation
Service: Missed Appointment: ADV
Start time: 9:00 AM - Length: 15 min -
End time: 9:15 AM

Notes: **Missed Appt. w/ Nathan @ 9am on 17.04.24 - Called client 5mins into appt. NO ANSWER - LMOV & sent 1st text. Waited until 9:15am and sent 2nd text message advising of MA** EM 16.04.24

MISSED APPOINTMENT NOTE TEMPLATE:

****Missed Appt. w/ THERAPIST NAME @ TIME OF ORIGINAL APPT on DATE - WHAT HAPPENED? WHAT EFFORTS TO CONTACT WERE MADE? ARE WE CHARGING OR WAIVING THE FEE? ANY ADDITIONAL FOLLOW UP REQUIRED? RECEPTION INITIALS & DATE**

EXAMPLE: ***Missed Appt. w/ Nathan @ 9am on 17.04.24 - Called client 5mins into appt. NO ANSWER - LMOV & sent 1st text. Waited until 9:15am and sent 2nd text message advising of MA.** EM 16.04.24*

Step 5. RETAIL THE APPOINTMENT

All MALC appointments must be retailed. Once retailed, the missed appointment will show up in the client's visit history. Click on the appointment and follow the retail process, just like you would with a standard appointment.

Point of Sale More ▾

Open Tickets Gift card balance Lookup

SLEEPING BEAUTY Current series: None

Assign Gift Card

TICKET	Item name	Qty	Price	Discount	Total
✗	ADV 1hr Missed Appointment Fee	1	\$61.00	0.00%, \$0.00	\$61.00

PROMOTION CODE

SUBTOTAL	DISCOUNT	GRAND TOTAL	incl. tax of \$5.55
\$61.00	\$0.00	\$61.00	

Payment info
SELECT A PAYMENT METHOD

✗

Complete the Sale

If we are charging a the fee and but haven't heard back from the client yet, you would retail this using ACCOUNT so the fee is recorded as a negative balance. This is the most likely scenario you would follow. (see above image).

If we know we are not charging for this missed appointment, then you would cancel out the cost of the fee and retail using CREDIT JOURNAL as the payment method. (see below image).

Point of Sale More ▾

Open Tickets Gift card balance Lookup

SLEEPING BEAUTY Current series: None

Assign Gift Card

TICKET	Item name	Qty	Price	Discount	Total
✗	ADV 1hr Missed Appointment Fee	1	\$61.00	100.00%, \$61.00	\$0.00

PROMOTION CODE

SUBTOTAL	DISCOUNT	GRAND TOTAL	incl. tax of \$0.00
\$61.00	-\$61.00	\$0.00	

Payment info
SELECT A PAYMENT METHOD

✗

Complete the Sale

Step 5. SEND MALC EMAIL AND ENSURE MALC NOTES ARE UP TO DATE.

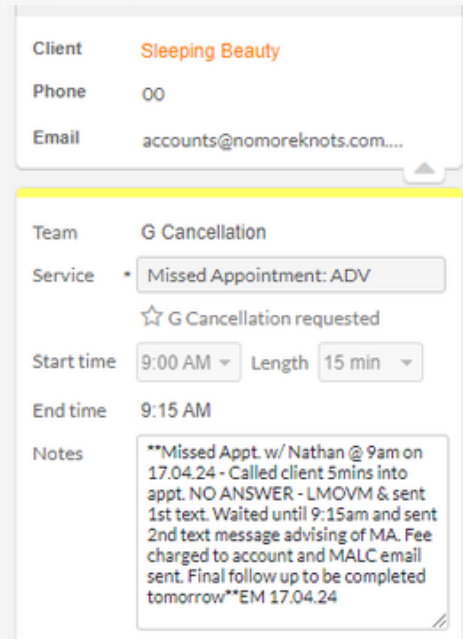
Update your MALC note to include:

- Decision made with FEE at this stage
- MALC email sent?
- Further follow up needed

Make sure this is copied to the NOTE section of the client's file and included in the MALC report in the running email.

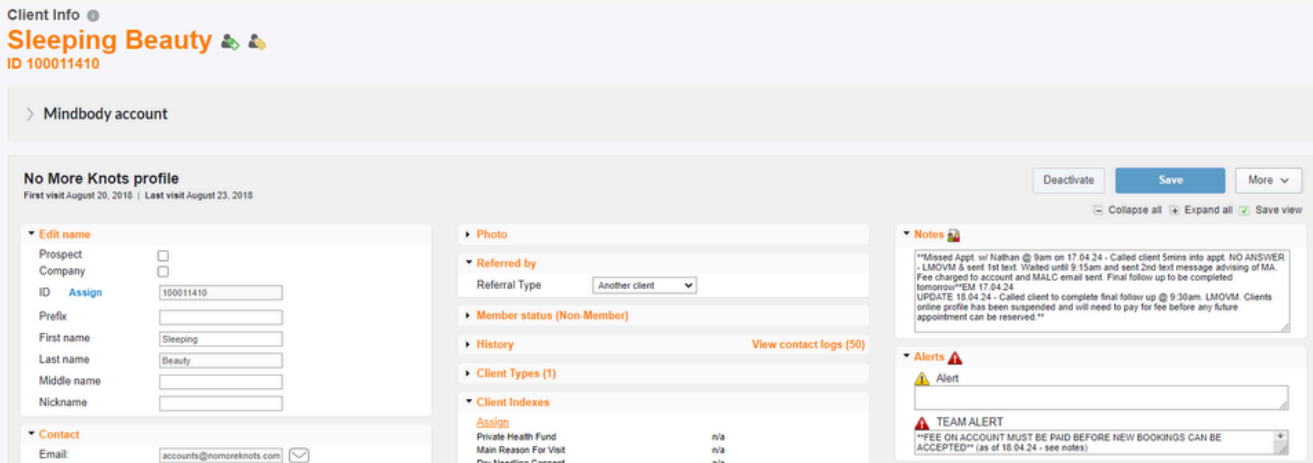
Example (see image Right):

***Missed Appt. w/ Nathan @ 9am on 17.04.24 - Called client 5mins into appt. NO ANSWER - LMOVVM & sent 1st text. Waited until 9:15am and sent 2nd text message advising of MA. Fee charged to account and MALC email sent. Final follow up to be completed tomorrow**EM 17.04.24*



Step 6. FINAL FOLLOW UP THE NEXT DAY - UPDATE NOTES

When completing the final follow up call, you will need to update the client file based on the outcome. (see below example)




Example (Above):

*UPDATE 18.04.24 - Called client to complete final follow up @ 9:30am. LMOVVM. Clients profile has been suspended and will need to pay for fee before any future appointment can be reserved.***

In situations like the above example where we have not been able to reach the client directly, we would also **suspend the client's profile** to inhibit their ability to book an appointment, and add a note to the top of the **red alert section**.

****FEE ON ACCOUNT MUST BE PAID BEFORE NEW BOOKINGS CAN BE ACCEPTED** (AS OF DATE - SEE NOTES)**

Alternative Example

Client Info ●
Sleeping Beauty 
 ID 100011410

> Mindbody account

No More Knots profile
 First visit August 20, 2010 | Last visit August 23, 2015

Deactivate Save More ▼

Collapse all Expand all Save view

Edit name

Prospect

Company

ID **Assign** 100011410

Prefix

First name Sleeping

Photo

Referred by

Referral Type Another client ▼

Member status (Non-Member)

History

Notes

***Missed Appt. w/ Nathan @ 9am on 17.04.24 - Called client 5mins into appt. NO ANSWER - LMOVIN & sent 1st text. Waited until 9:15am and sent 2nd text message advising of MA. Fee charged to account and MALC email sent. Final follow up to be completed tomorrow**EM 17.04.24
 UPDATE: 18.04.24 - Called client to complete final follow up @ 9:30am. Spoke directly with client and collected fee over the phone. Client was very apologetic and has rebooked for next week - EM 18.04.24

Example (Above):

UPDATE 18.04.24 - Called client to complete final follow up @ 9:30am. Spoke directly with client and collected fee over the phone. Client was very apologetic and has rebooked for next week - EM

COLLECTING PAYMENT FOR A MISSED APPOINTMENT FEE

If at any stage in this process we are successful in collecting payment for the missed appointment fee over the phone you will need to make sure we apply that payment correctly.

If you had not yet retailed the original missed appointment with ACCOUNT, you could do this now just using EFTPOS/CREDIT CARD.

If the original appointment is already retailed under ACCOUNT (i.e there is now a negative amount on the client's account) we will apply a payment to zero this out.

1. Go to the retail screen under the client's profile, and select the option for ACCOUNT PAYMENT, which can be found under the selection for PAYMENTS/GIFTCARDS

Point of Sale

Search for the client making a purchase Add new client Walk-In Sale

Open Tickets New ticket ▼ Gift card balance Lookup

SLEEPING BEAUTY Assign Gift Card Assign Current series: None

Account balance: \$61.00

TICKET Greenslopes 16/04/2024 Save Ticket Print Ticket 📄

-- No Items Selected --

Add Item Receive payments Pay for another client

Item Name	Price	Credit	Subtotal	Discount	Total
Account Payment at \$0.00	61.00	61.00	\$61.00	\$0.00	\$61.00
Client paid for MALC fee over the phone - EM 17.04.24					

SUBTOTAL \$0.00 **DISCOUNT** \$0.00 **GRAND TOTAL** \$0.00 incl. tax of \$0.00

2. Enter the corresponding amount to the payment made into the 'PRICE' section. Then add a note to showcase what this payment is.

Example above: Client paid for MALC fee over the phone - EM 17.04.24

3. Add the item to the cart, and process the payment using 'EFTPOS/CREDIT CARD'. Once retailed, the client's negative balance should disappear.

SUSPENDING A CLIENT'S ACCOUNT

In the event that a client misses an appointment and does not get back to us in our final follow up, we will suspend their account.

To do this:

1. Go to the CLIENT INFO. section of their profile.
2. Under 'MEMBER STATUS' select the tick box for 'SUSPEND CLIENT BOOKING'.

Client Info

Sleeping Beauty

ID 100011410

> Mindbody account

No More Knots profile
First visit August 20, 2018 | Last visit August 23, 2018

Deactivate Save More

Collapse all Expand all Save view

Edit name

Prospect

Company

ID Assign

Prefix

First name

Last name

Middle name

Nickname

Photo

Referred by

Referral Type

Member status (Non-Member)

Auto Pays limit

Suspend client booking

Paused data

Pause end date

Notes

Alerts

Alert

TEAM ALERT

"FEE ON ACCOUNT MUST BE PAID BEFORE NEW BOOKINGS CAN BE ACCEPTED" (as of 18/04/24 - see notes)

Rep (Not Assigned)

ICD Codes

If the client was to call and book an appointment, when a spot on the diary is selected the following alert would pop up on the screen. We would also be able to see the Negative Balance and Red Alert attached to the file.

The screenshot shows a booking system interface with a calendar view. A modal alert box is displayed in the center, titled "SLEEPING BEAUTY". The alert contains the following text: "Client Suspended", "Suspend From Date:", "Suspend To Date:", and a "Dismiss" button. In the background, the calendar shows various appointment slots. On the left side, there is a "Book Appointment" section with a "Client" dropdown menu. The "Client" dropdown is circled in red, and "Sleeping Beauty" is selected. Below the "Book Appointment" section, there is a "Rebook a Past Visit" section with two entries: "Thu, 23 August 2018" and "Mon, 20 August 2018", each with a "Late Cancell..." button and a "\$0" amount.

In this instance, we would want to secure a phone payment for the fee before proceeding with booking and confirming an appointment. Once received, we could then amend the client's profile by removing the suspension and the note in the red alert section.

SUMMARY OF STEPS

LATE CANCELLATION

1. Client calls to cancel appointment
2. Based on the circumstances make a decision regarding whether or not there will be a fee charged
3. Offer to reschedule the appointment
4. Advise/remind of appointment policy and collect fee over the phone.
5. Change the service of the appointment to a LATE CANCELLATION (15mins)
6. Move appointment to sit under the Cancellation Column, starting at the same time as the original appointment
7. Write up your MALC note on the appointment.
8. Retail the appointment in MINDBODY
9. Copy the MALC note to the NOTE section in the client profile
10. Add all details to the MALC Report in the Running Email

MISSED APPOINTMENT

1. Call client 5mins into the appointment to check on whereabouts. If you don't reach them, leave message on voicemail and send 1st text. Make a note on the appointment and advise therapist of what is happening.
2. If no response from client, follow up with 2nd text 10mins later (approximately 15mins into the start of the appointment). Update the therapist.
3. Change the service of the appointment to a MISSED APPOINTMENT (15mins)
4. Move appointment to sit under the Cancellation Column, starting at the same time as the original appointment
5. Write up your MALC note on the appointment.
6. Retail the appointment
7. Give clients an opportunity to respond and call us back. As part of the pre-close stage of your day (When you would do your EOD confirm follow up) send the MALC email to the client.
8. Update MALC notes on the appointment and copy the MALC note to the NOTE section in the client profile
9. Add all details to the MALC Report in the Running Email.
10. Final follow up to be completed the next day.

EXCEPTION:

If missed appointment is a final client of the day, MALC email will be sent after FINAL FOLLOW UP the next day :)

CLINIC CANCELLED APPOINTMENTS

Clinic cancelled appointments are recorded when we are forced to cancel an appointment on a client last minute. This is to flag clients easily on the diary that might require additional follow up from a therapist OR that may reach out to the clinic after we have taken action and removed their original appointment from the diary. In these circumstances, we want to record client and appointment information, in a similar way to how we handle MALC appointments.

WHEN TO USE A CANCELLED APPOINTMENT

1. **A therapist calls in sick or requests last minute time off on the same day.** If we have been unable to reschedule the client in that moment, we would change the appointment to a CANCELLED APPOINTMENT. You could also make this change already if you have LMOVM and sent text to the client, but have not yet heard back. We can move these appointments to our cancellation column, and block off the clients diary as normal with SICK or TIMEOFF block-outs. *i.e. appointments at any time still left on the therapist's schedule would mean that they have not been contacted directly yet.* If you have successfully spoken to the client on the initial phone call and reschedule to another day or therapist, then you do not need to use CANCELLED APPOINTMENT.
2. **We have made the decision to cancel an appointment on the client as they have not confirmed (SEE APPOINTMENT REMINDER POLICY).** If we have made the decision for whatever reason to cancel this appointment for the client because we have not heard from them directly yet, then we would use this process to record the situation in-case the client turns up or calls back.

****This appointment service is for last minute cancellations by the clinic only. You would not use this if you were looking at rescheduling appointments that have several days/weeks notice****

PROCESSING A CLINIC CANCELLED APPOINTMENT

Clinic cancelled appointments do not incur any fee for the client; however, we will still retail them in MINDBODY for reporting purposes, and for an accurate visit record on the client's profile.

Step 1 . CHANGE THE APPOINTMENT TO A CANCELLED APPOINTMENT

Change the service type of the appointment to a CANCELLED APPOINTMENT which will show up as a 15min session.

Step 2 . MOVE THE APPOINTMENT FROM THE THERAPIST'S DIARY TO THE CANCELLATION COLUMN

We want to remove the appointment from the therapist's diary to free the appointment space up for whatever we are putting in it's place (SICK/TIMEOFF or another RDO client). Where possible, move the appointment across to line up with the start time of the original appointment. You may need to open up availability on the diary to do this.

Step 3 . WRITE YOUR NOTE ON THE APPOINTMENT

We keep a record of when, who with, reason, ect. This should all be recorded on the appointment so all of this can be seen from the diary directly.



CANCELLED APPOINTMENT NOTE TEMPLATE:

****CANCELLED APPOINTMENT w/ THERAPIST NAME @ TIME OF ORIGINAL APPT on DATE - WHAT HAPPENED/WHEN & HOW THE CLIENT CONTACTED TO ADVISE. ANY ADDITIONAL FOLLOW UP REQUIRED?** RECEPTION INITIALS & DATE**

EXAMPLE:

****CANCELLED APPOINTMENT w/ Nathan @ 9am on 17th May - Therapist called in sick for today at 8am. LMOV & sent text to client @ 8:15am advising that appointment had been cancelled due to this and to please call back when ready so we could assist in rescheduling.** EM 17.05.24**

Step 4. RETAIL THE APPOINTMENT

All cancelled appointments must be retailed. Once retailed, it will show up in the client's visit history. Click on the appointment and follow the retail process, just like you would with a standard appointment.

A clinic cancelled appointment will not incur a fee for the client. It will show up as a \$0 item, and you will process the payment using CREDIT JOURNAL.

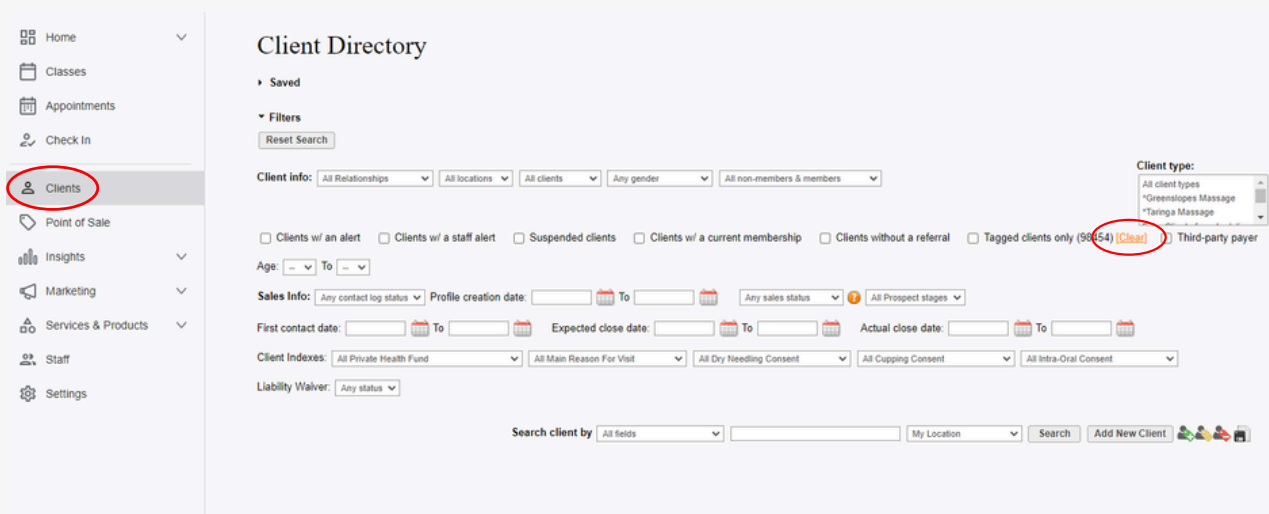
****Unlike a MALC appointment and note, you do not need to add this to the client's profile directly or to the running email. These appointments do not require additional follow up from us, unless prompted. ****

CLIENT RECALLS

Our client recall process is an initiative designed to help encourage and remind clients who had cancelled an appointment during the week before to schedule their next one if they have not already done so at the time. We will look at clients who cancelled in just the week prior who were also meant to attend in that week. We are not looking at clients who have cancelled an appointment for weeks/months ahead, as these clients are likely to have had a significant reason for doing so.

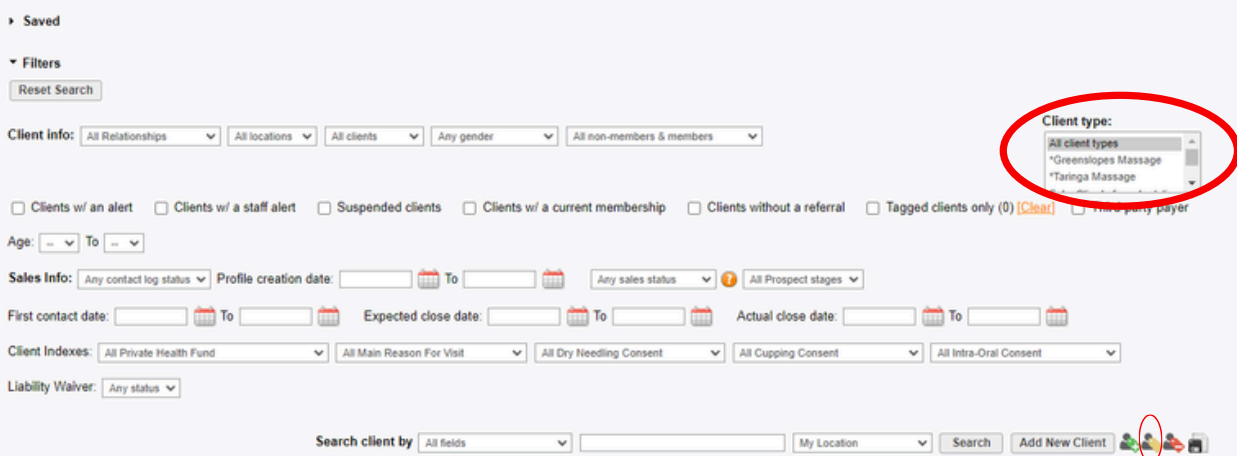
COLLECTING THE CLIENT LIST

1. Go to 'CLIENTS', and in the 'Client Directory' we need to create our 'Tag Group' to collect the accurate data. Click the [Clear] button next to 'Tagged clients only' to start fresh.



2. Under 'Client type:' Select 'All client Types, then click the yellow tag icon to tag the new group.

Client Directory



3. Under 'Client type:' Select 'Fake Clients for scheduling', then click the red tag icon to remove these clients from the tag group. **Watch for the number of the tag group to drop. For some reason, you will often need to click the red icon twice**

Client Directory

Saved
 Filters

Client info:

Clients w/ an alert Clients w/ a staff alert Suspended clients Clients w/ a current membership Clients without a referral Tagged clients only (96787)

Age: To

Sales Info:

First contact date:

Client indexes:

Liability Waiver:

Search client by

Click on a client's name below to view their information.
 Client not in the list below? [Add New Client](#)

Name	ID	Birthday	Age	Name	Phone	Address	Email
---- No matching clients founds ----							

4. Go to 'Insights' --> 'Reports, and find the report 'Cancellations'

- Home
- Classes
- Appointments
- Check In
- Clients
- Point of Sale
- Insights**
- Reports
- Retention Marketing
- Marketing
- Services & Products
- Staff
- Settings

Reports

Powerful reports that help you make informed business improvements. Use these reports to research sales trends, track popular services, identify big spenders, and much more.

- Favorite Reports
- Sales
- Payment Processing
- Virtual Wellness
- Clients

Search Results

Cancellations View Report >

Generate a list of all client cancellations as well as which staff member processed them. You can also undo a cancellation from this report.

5. Run the report looking at cancellations that occurred only the week before. *For example, if you were doing this on Monday 17th June, you would look at the date range from the 10th June to the 16th June.* Select a range for your 'Start date' & 'End date'. You can also choose to look at individual clinic location. Select 'Generate' then, download the report to excel.

Reports » Cancellations

Date Range: Start date: End date: All locations All teachers All View All Restore:

Client(s): All Selected:

Sort By:

6. Open the report in Excel and enable editing of the document. You may wish to save it somewhere. We need to filter this data to get rid of what we don't need.

	A	B	C	D	E	F	G	H	I	J	K
1	Cancel Date/Time	Cancelled By	Date	Time	Type	Location	Therapist	Client	Meth	Add	
2	16/06/2024 11:19:52 AM	_Bowtie API	18/06/2024	11:15 am	*Remedial Mass	Taringa	Dyllan (RMT)	Carmel Butler	early	No	
3	16/06/2024 10:41:41 AM	_Bowtie API	18/06/2024	9:00 am	*Remedial Mass	Greenslopes	Marco (ADV)	Anthony Postlethwaite	early	No	
4	16/06/2024 9:34:02 AM	_Bowtie API	18/06/2024	11:15 am	*Remedial Mass	Greenslopes	Aurelie (ADV)	Sandi Canuto	early	No	
5	16/06/2024 9:03:30 AM	_Bowtie API	18/06/2024	3:15 pm	*Remedial Mass	Newmarket	Gordon (RMT)	Kate Macdermid	early	No	
6	15/06/2024 3:23:44 PM	_Bowtie API	19/06/2024	10:15 am	Myotherapy	Greenslopes	Nathan (AMYO)	Dale Brady	early	No	
7	15/06/2024 2:55:48 PM	India White	15/06/2024	3:45 pm	Z BREAK Z	Taringa	Marco (ADV)	BREAK BREAK	early	No	
8	15/06/2024 2:54:03 PM	Keana Thomson	15/06/2024	3:00 pm	FEES	Greenslopes	Cassandra (SNR)	Marina Couchman	early	Yes	
9	15/06/2024 2:52:47 PM	Keana Thomson	27/04/2024	8:00 am	Initial Remedi	Greenslopes	Christine (SNR)	Marina Couchman	early	No	
10	15/06/2024 2:52:47 PM	Keana Thomson	27/04/2024	8:00 am	FEES	Greenslopes	Christine (SNR)	Marina Couchman	early	Yes	

a) Highlight the headings in Row 1 and select the option to filter.

You can use the shortcut CTRL + SHIFT + L

b) Select the drop down for Column E (Type), De-select all options, and only select options that are NOT an actual appointment type, such as breaks, fees, missed appointments, tentative...

c) Delete all the rows for this data. Then select the drop down for Column E (Type) again and re-select all remaining options

d) Select the drop down for Column C (Date), De-select all options, and only select options that are NOT within our desired date range. *For example: if we are looking at cancellations over the week 10th June - 16th June, then we only want our data to show appointments within that date range.*

e) Delete all the rows for this data. Then select the drop down for Column C (Date) again and re-select all remaining options

We should now only be left with the clients that we want to look at.

WHO DO WE NEED TO MESSAGE?

We now need to go through our list and check these clients to see who has not made a future booking. We do not need to text/recall everybody on our list!

You will need to look out for:

- Appointments that were early cancelled due to admin changes (appointment was deleted but this was not actually for a client cancellation)
- Appointments that were early cancelled due to a short-term reschedule (i.e. cancellation list is showing an appointment cancelled on the 10th, but when checking the client profile, their last visit was the 13th. We do not need to contact these clients.
- Clients who have a future booking already :)

CHECK EXAMPLES



1. ADMIN AMENDMENTS

In this example, there was likely a reason for admin needing to change/delete the original appointment on the day. We can see this as the report shows an early cancellation on the 15.06.24 @ 10:15am, yet the visit history of the client shows that they were last in clinic on the 15.06.24 @ 10:15am.

Date	Time	Type	Location	Therapist	Client
15/06/2024	10:15 am	*Remedial Mass	Newmarket	Jaime (SNR)	Eve Gath

Client Home Client Info Contact logs Schedule Visits Purchases Account Details SOAP Notes

Client Home

Client Search Add New Client

Eve Gath
Age: 21 years 5 months

Last Visit: [15/06/2024 10:15 am - Remedial Massage / 1hr Remedial Massage \(SNR\)](#)

This is not considered a true appointment cancellation; therefore, we do not need to message this client.



2. CLIENT HAS ALREADY BEEN IN CLINIC SINCE THE CANCELLATION

In this example, the appointment listed in our report is not the last visit for the client. We can see this as the report shows an early cancellation on the 15.06.24 @ 11:30am, yet the visit history of the client shows that they were last in clinic on the 18.05.24 @ 11:30am.

Date	Time	Type	Location	Therapist	Client
15/06/2024	11:30 am	*Remedial Mass	Newmarket	Jaime (SNR)	Michelle Doidge

Client Home Client Info Contact logs Schedule Visits Purchases Account Details

Client Home

Client Search Add New Client

Michelle Doidge
Age: 50 years 8 months
Spouse: [Shane Doidge](#) Age: 60 years 10 months

Last Visit: [18/05/2024 11:30 am - FEES / Weekend /PH Surcharge](#)

This client has already rescheduled and had their appointment; therefore, we do not need to message them.



3. FUTURE APPOINTMENT ALREADY SCHEDULED

If a client already has a future visit scheduled, we do not need to contact them.

Client Home Client Info Contact logs Schedule Visits Purchases Account Details SOAP Notes

Client Home

Client Search Add New Client

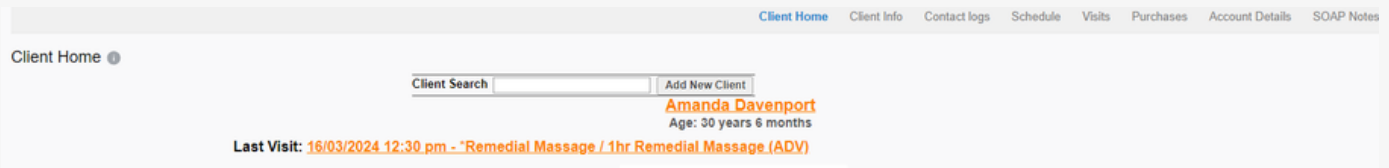
Natalie Wright
Age: 52 years 9 months

Last Visit: [23/05/2024 2:45 pm - Remedial Massage / 1hr Remedial Massage \(RMT\)](#) Next Booking: [21/06/2024 1:00 pm - Remedial Massage / 1hr Remedial Massage \(RMT\)](#)



4. NO FUTURE VISITS SCHEDULED

If a client does not have a future visit scheduled AND the last visit on their profile is prior to the early cancelled appointment then we will send them a message :)



TEXT TO CLIENTS - SCRIPT

Hi **[Client's Name]**,
We missed seeing you last week! Our diary is filling up fast, so we'd love to reschedule at your convenience.
You can book your next appointment directly at www.nomoreknots.com.au or feel free to call us at **[clinic number]**.
We're looking forward to welcoming you back to the clinic soon!

WHY DONT WE JUST TEXT EVERYONE ON THE LIST? WHY CHECKING THE CLIENTS PROFILE IS IMPORTANT!

Remember, the purpose of this process is to catch anyone who cancelled their appointment in a recent timeframe, but may have been too busy at the moment to reschedule their appointment. This is to help with immediate client retention. We don't want to text clients in our list who have just shuffled an appointment around, or those who have already gone to the effort to reschedule.

In this example, following the process above, out of the list of clients collected for the Newmarket clinic, it is only appropriate to message 6 / 24 of them.

	A	B	C	D	E	F	G	H
1	Date	Time	Type	Location	Therapist	Client		
2	15/06/2024	10:15 am	*Remedial Mass	Newmarket	Jaime (SNR)	Eve Gath		
3	15/06/2024	11:30 am	*Remedial Mass	Newmarket	Jaime (SNR)	Michelle Doidge		
4	15/06/2024	10:45 am	*Remedial Mass	Newmarket	Nicole (RMT)	Natalie Wright		
5	14/06/2024	4:00 pm	*Remedial Mass	Newmarket	Adrianne (AMYO)	Talinja Hogg		
6	15/06/2024	12:15 pm	*Remedial Mass	Newmarket	Mata (SNR)	Julia Lindner		
7	14/06/2024	9:45 am	*Remedial Mass	Newmarket	Jackie (SNR)	Lauren Beck		
8	15/06/2024	12:15 pm	*Remedial Mass	Newmarket	Mata (SNR)	Louise Bishell		
9	14/06/2024	10:30 am	*Remedial Mass	Newmarket	Nicole (RMT)	Aaron Huxley		
10	13/06/2024	10:15 am	Initial Remedi	Newmarket	Adrianne (AMYO)	Toni Donaldson		
11	14/06/2024	9:45 am	*Remedial Mass	Newmarket	Jackie (SNR)	Jenna Hooper		
12	12/06/2024	2:30 pm	Initial Remedi	Newmarket	Adrianne (AMYO)	Sarah Ashcroft		
13	11/06/2024	6:00 pm	*Remedial Mass	Newmarket	Gordon (RMT)	Robert Shallcross		
14	13/06/2024	2:00 pm	*Remedial Mass	Newmarket	Adrianne (AMYO)	Laura Ernst		
15	11/06/2024	3:45 pm	*Remedial Mass	Newmarket	Adrianne (AMYO)	Jenny Mckarzel		
16	14/06/2024	10:30 am	*Remedial Mass	Newmarket	Nicole (RMT)	Ozanna Beckmann		
17	12/06/2024	2:30 pm	Myotherapy	Newmarket	Adrianne (AMYO)	Jo O'Reilly		
18	13/06/2024	9:45 am	*Remedial Mass	Newmarket	Jackie (SNR)	Susan Heitman		
19	11/06/2024	4:30 pm	*Remedial Mass	Newmarket	Emma (RMT)	Zac Fleming		
20	13/06/2024	11:45 am	*Remedial Mass	Newmarket	Jackie (SNR)	Nicola Leahy		
21	13/06/2024	4:45 pm	*Remedial Mass	Newmarket	Gordon (RMT)	Annaliese Mitchell		
22	11/06/2024	11:30 am	*Remedial Mass	Newmarket	Gordon (RMT)	Phil Hennessy		
23	10/06/2024	3:30 pm	*Remedial Mass	Newmarket	Bruce (RMT)	Kelly Fischer		
24	12/06/2024	8:45 am	*Remedial Mass	Newmarket	Adrianne (AMYO)	Brooke Nowitzke		
25	12/06/2024	12:15 pm	Myotherapy	Newmarket	Adrianne (AMYO)	Angela Giles		
26								
27								
28								
29								

CONTINGENCY PLANS

Locations of items such as fire extinguishers, black out boxes, spare laptops, ect. will be different at each clinic location. it is your responsibility to familiarise yourself with the location of all emergency and contingency items so you can easily access them when necessary.

IN CASE OF A BLACK OUT OR POWER OUTAGE

1. Don't panic! Firstly, identify what power has been disconnected. Is it clinic wide or only affecting certain areas? It could be a matter of checking the clinic switch boards to see if something has been triggered and just needs to be reset. If you have identified the issue is wide spread and not able to be solved in-house, proceed with the next steps.
2. Advise a manager of the issue.
3. Grab the spare laptop or clinic device, and login and get MINDBODY diary up ASAP. The main reception computers run off the main power so you will lose access to these in an outage. **If you do have to use any personal data for the business, NMK will reimburse you for the cost.*
4. Get CC payment slips ready & review diary to make sure you know who is coming in/out in the next 5-15min so you can be prepared.
5. Get a manager to login to our phone system to manually divert the phones to another clinic location (phones don't work when power goes out & we don't want to lose phone calls)
6. Phone/text/email other clinic locations to let them know their phones are about to get busier
7. Get a manager or other receptionist to knock on treatment room doors and explain we have a power outage & typically it will be back up within 30-60min.
8. Get a manager to do a SMS to the therapists know about outage, be prepared to use phone for checking diary & music in rooms, etc.
9. Get either a manager or another receptionist to call Energex on 136262 to report and get an update on the outage.

Be mindful of safety risks in a power outage. There is emergency lighting available in the clinic 'Blackout Boxes'; however, if lighting is an issue, it may not be safe to proceed with the current treatments until full lighting is restored. Our clinics operate with electric tables, so in a power outage a therapist will not be able to adjust these. If there are not rooms with a bed available at a suitable height for treatment, we may need to reschedule appointments for when full power is restored. The safety and comfort of our clients and team is most important :)

**** If you don't have another receptionist or a manager around to help, find a therapist to help with some of these steps if that's possible****



INTERNET OUTAGE

1. Identify whether it is a connection issue with the device or an issue that is not resolvable currently in-house. You may be able to fix the issue by resetting the modem or reconnecting the device to the internet. Check if there are other devices being affected by the issue; is it just the one computer? Are phones and terminals also disconnected? Is there anything else that is not functioning as it should be? If you have identified that there is definitely an internet issue that is widely affecting the clinic and you have not been able to problem solve it, proceed with the next steps.
2. Advise a manager of the issue.
3. View the MINDBODY diary on your own personal device or by hot-spotting a clinic device with your data. **If you do have to use and personal data for the business, NMK will reimburse you for the cost.*
4. Review the diary to make sure you know who is coming in/out in the next 5-15min so you can be prepared. The terminals run via ETHERNET connection, so if the internet is out HICAPS claiming is unlikely to go through without this connection. CASH can be accepted and EFTPOS payments may still work on the TRINITY HICAPS terminal if the problem is an isolated WIFI issue (these can operate with 4G). If you are able to take full payment, please ensure to provide a full tax invoice with provider information for client's who need to do a manual claim with their health fund. If the terminal does not work collecting EFTPOS/CREDIT card payments either, refer to the process below for what to do when the terminal does not work.
5. Get a manager to login to our phone system to manually divert the phones to another clinic location (our phones run on internet connection & we don't want to lose phone calls)
6. Contact the other clinic locations to let them know their phones are about to get busier
7. Get a manager to do a SMS to the therapists know about outage, be prepared to use phone for checking diary & music in rooms, etc.
8. Depending on the situation, we may need to contact Sentrion or the clinic internet provider to help fix the issue.

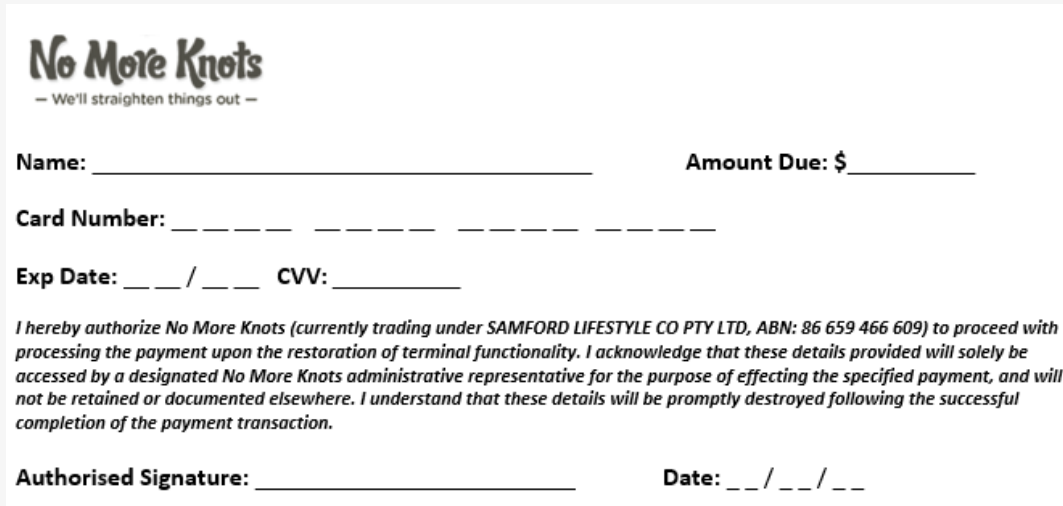
HICAPS / EFTPOS TERMINAL NOT WORKING

1. Identify the cause of the issue and check all cords and power. If the issue seems like a fault with the terminal only (not power outage or internet issues) try initial problem-solving steps to see if that helps:
 - a. Turning on/off
 - b. Unplugging and readjusting cords
 - c. Terminal heartbeat
 - d. Check how it is connected - the terminals should be operating on the clinic WIFI so you may need to adjust this and reconnect if this is not displaying correctly.
2. If you are not successful in fixing the issue, get CC payment slips ready for those who are not able/don't wish to pay with cash. These slips should collect the following information:
 - a. Client Name
 - b. Amount Due
 - c. Card Details (Card Number, Expiry Date & CVV)
 - d. Signature and Date
3. Advise clients that due to issues with the terminal, we are unable to process health fund rebates on the spot either, and we will issue a full tax invoice with provider information for manual claiming once we have been able to process payment.
4. Ensure that we have an accurate email on file to send through receipts.
5. Contact HICAPS directly on 1300 650 852 to get assistance troubleshooting the terminal if required.

ALTERNATIVE PAYMENT METHODS

CC SLIPS - This is the easiest method as we then have all the information that we need to process the payment quickly through the terminal once we have been able to rectify the issue. You will need to remember to send the client a full tax invoice with provider details for manual claiming with their health fund once we have been able to process the payment.

Shred the slips once payment has been processed.



No More Knots
— We'll straighten things out —

Name: _____ Amount Due: \$ _____

Card Number: _____

Exp Date: ___ / ___ CVV: _____

I hereby authorize No More Knots (currently trading under SAMFORD LIFESTYLE CO PTY LTD, ABN: 86 659 466 609) to proceed with processing the payment upon the restoration of terminal functionality. I acknowledge that these details provided will solely be accessed by a designated No More Knots administrative representative for the purpose of effecting the specified payment, and will not be retained or documented elsewhere. I understand that these details will be promptly destroyed following the successful completion of the payment transaction.

Authorised Signature: _____ Date: ___ / ___ / ___

BANK TRANSFER - If a client is unable to pay for treatment with card or cash, we can accept a bank transfer. Bank Details can be found securely in safe or till and can be provided to the client to make the payment on the spot.

Client is required to send a screenshot of the approved transaction to the reception email once made.

Please retail the appointment in MINDBODY using the payment method ACCOUNT, with the note 'Payment made via DD on DATE' - INITIALS.

Forward the email with proof of payment to the Accounts Manager via accounts@nomoreknots.com.au including full client details (name, phone number, treatment details). The AM will balance out the client's account in MINDBODY once payment has been confirmed in our account. This may take up to 1-2 Business Days to be received.

Once payment has been confirmed, AM will let reception know so they can forward through a tax invoice with provider details for manual claiming to the client directly.

PHONE PAYMENT - If a client is unable to pay for treatment on the spot with any other means (cash, bank transfer, providing card details), they can call us back later and make a payment over the phone.

For example: A client comes out of treatment and has forgotten their phone and wallet at home.

Advise that they can give us a ring and make payment over the phone when they get home. If we haven't heard from them in a couple hours that we will call them directly. Ensure that we check phone number and email on file for the client before they leave so we can follow up with them if necessary. If you are unable to reach them by EOD for payment, please send through an invoice directly to the client and advise management of the outstanding fee. This will need to be monitored until we receive payment.

See steps for HOW TO TAKE A PAYMENT OVER THE PHONE

See template for service invoice. *Includes Late Fee if not paid within terms (7days).*

****You do not need to fill out a Promise to Pay slip for an example like this. Completion of service means the client is liable to pay for services rendered; we don't need a signed promise to pay slip to chase payment from a client****

PROMISE TO PAY SLIPS - Use these in the rare event that a client is not able to pay on the spot for treatment by any means and is not in a position to rectify the situation by close of business.

It is expected that a client is able to pay at the time of service, so we do not accept bookings knowing in advance that the client is going to be unable to pay.

PROMISE TO PAY SLIP

No More Knots
— We'll straighten things out —

Client Name: _____ Today's Date: __/__/__

Client Address: _____

Client Ph: _____ Client Email: _____

Service Received: _____ Service Cost: \$ _____

I promise to pay No More Knots Massage Therapy (currently trading under SAMFORD LIFESTYLE CO PTY LTD, ABN: 86 659 466 609), the amount set above for services received on this date, within 3 BUSINESS DAYS. I understand the payment options presented to me, and understand that failure to make payment via the agreed period will result in a late fee applied to my invoice.

Client Signature: _____ Date: __/__/__

****A COPY OF YOUR DRIVER'S LICENCE OR OTHER RELEVANT ID MUST BE PROVIDED****

Receptionist Name: _____

Receptionist Signature: _____ Date: __/__/__

DAY OF A POSSIBLE STORM

1. Print a hard copy of the diary every couple of hours for that day and the following. if you have time, export **schedule at a glance** report and put in order of either time or therapists name with an area for notes/follow up.
2. Make sure the spare clinic device or laptop is charged in case we loose power. You may need to be ready to use a personal device to hotspot for internet connection.
3. Prepare for alternative payment methods that may be required if we loose function of our terminals
4. Check stock of batteries and little portable lights in case we need later in the day when it gets dark
5. Remind therapists if we do lose power to have the massage tables at a good height for treating clients
6. Send SMS to therapists asking them to read over notes early and make notes in case we lose power, they will still be able to access MB on their phones if need be but not soap notes
7. Send SMS to all clients in coming 1-2-3 hours if it looks like the storm will hit soon saying ***“Allow extra time for traffic due to possible storms”***
8. Make sure that there is a spot for wet belongings and umbrellas out of the way. Use the wet floor sign, and make sure you have a dry mop and towels to get rid of excess water on the floor as required to prevent slip hazards.
9. Its our job to ensure everyone stays cool, calm and collected. Storms are part of life in Qld, so we just need to all be prepared for them and know exactly what to do with as little drama and interruption to business as possible



YOU ARE ALSO REQUIRED TO BE FAMILIAR WITH THE **EMERGENCY MANAGEMENT & FIRE EVACUATION PLANS** FOR EACH CLINIC. PLEASE FAMILIARISE YOURSELF WITH THESE PROCEDURES REGULARLY, AND MAKE SURE THAT YOU KNOW WHERE THESE PLANS ARE AVAILABLE.

THESE PROCEDURES INCLUDE:

FIRE SAFETY & EVACUATION

HAZARDOUS MATERIAL

BOMB THREAT

MEDICAL EMERGENCY

PERSONAL THREAT / ASSAULT EMERGENCY

ARMED ROBBERY

LOCK DOWN

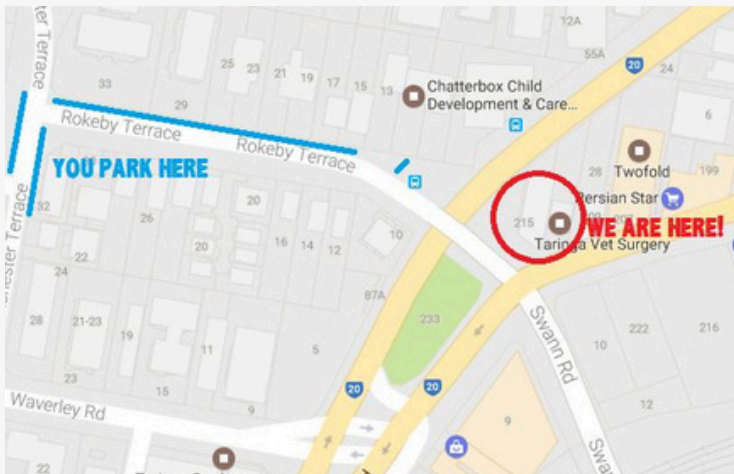
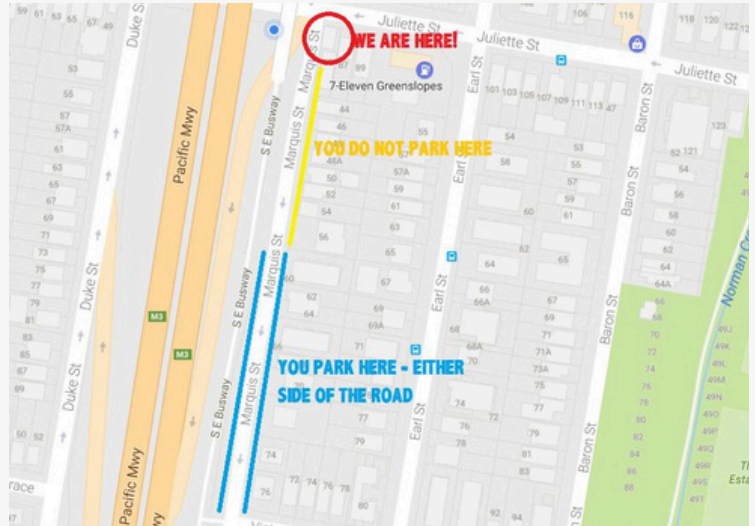


PARKING

Limited onsite parking is available at each clinic location for clients only. All staff and contractors if travelling in their own vehicle, must find suitable parking elsewhere. At all clinic locations there is free street parking available, easily accessible to the clinic.

GREENSLOPES

Recommended parking is towards the end of Marquis St, ideally on the right hand side. We do try to leave the closer parks and left hand side to clients and residents.

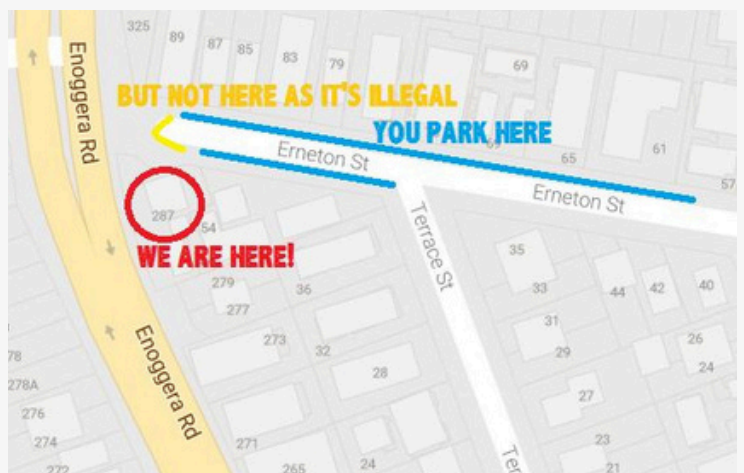


TARINGA

Recommended parking is along Rokeby Terrace.

NEWMARKET

Recommended parking is along Erneton St, accessible by turning onto Wickham St from Enoggera Rd and then taking the first exit at the roundabout on to Terrace St. Do not park at the end of the cul de sac as it is a marked 'No Parking' area and you may receive a ticket.



MINDBODY

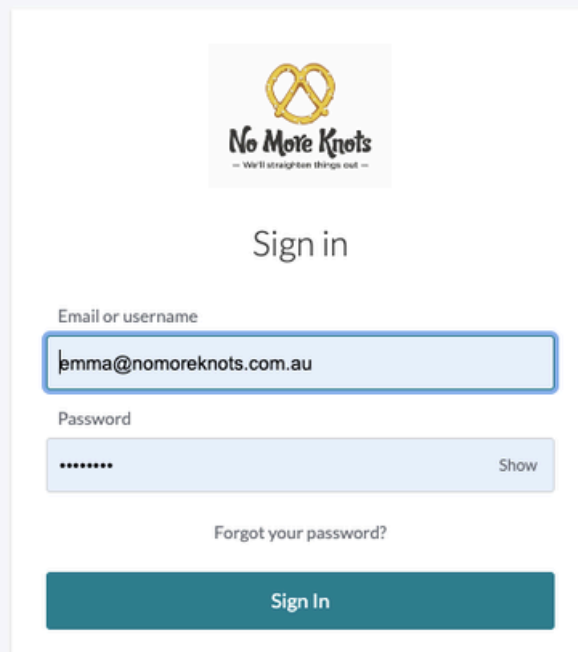
MindBody is our complete, all-in-one, diary system and client database. It is an online program which we use to create bookings, manage client data, process payments and much more!

LOGGING INTO MINDBODY

Each NMK Team member is set up with their own unique staff login when they join NMK.

As a member of our admin team, you must ensure that you are logged in with your account when you are working. Your log in details are set up as part of our RECEPTION permission group, which will allow you to view particular features and functions in MINDBODY that our practitioner team do not.

Any action that you make on an appointment with your account will also be DATE & TIME stamped with your name. This will help us track actions in the system.



The screenshot shows a web form for signing in. At the top is the 'No More Knots' logo, which consists of a yellow knot icon above the text 'No More Knots' and the tagline '— We'll straighten things out —'. Below the logo is the heading 'Sign in'. There are two input fields: 'Email or username' containing 'emma@nomoreknots.com.au' and 'Password' with masked characters and a 'Show' button. A link for 'Forgot your password?' is located below the password field. At the bottom is a large teal 'Sign In' button.

This sign-in is for staff only.

[Looking to book a service?](#)

Make sure you are logging in via the staff portal - your account details will not work on the client screen. It should look like this.

DIARY AT A GLANCE - SERVICE CATEGORY

The screenshot displays a software interface for a service category diary. At the top, there is a search bar labeled "CLIENT SEARCH BAR" and a "DAY/WEEK VIEW" selector. Below this is a "DIARY NOTES" section. The main area is a grid of appointments, with columns for "THERAPISTS" and "CLINIC VIEW". A "CANCELLATION LIST" is visible on the right side. The interface includes various filters and controls, such as "STATUS MODES" and "COLOUR KEY" at the bottom. The appointments are color-coded and labeled with their status, such as "INITIAL APPOINTMENT", "TENTATIVE APPOINTMENT", "PREGNANCY APPOINTMENT", "AVAILABLE APPOINTMENT", and "OUTS/BREAKS".

CLIENT SEARCH BAR

DAY/WEEK VIEW

DIARY NOTES

THERAPISTS

CLINIC VIEW

CANCELLATION LIST

CALENDAR

STATUS MODES

COLOUR KEY

STANDARD APPOINTMENT

INITIAL APPOINTMENT

TENTATIVE APPOINTMENT

PREGNANCY APPOINTMENT

AVAILABLE APPOINTMENT

OUTS/BREAKS

DIARY AT A GLANCE - STATUS

The screenshot displays a software interface for a diary at a glance. The top navigation bar includes a search for client, a date selector for March 2021, and a calendar view for April 2021. The main area shows a grid of appointments for Thursday, 11 March 2021, from 8:00 AM to 8:00 PM. The appointments are organized into columns for different rooms: Room 16, Room 12, Room 17, Room 13, Room 14, Room 5, Room 7, Room 8, Room 2, Room 4, Room 3, and Room 6. Each appointment entry includes a time slot, room name, and client name. The appointments are color-coded and marked with status icons. Four specific status labels are highlighted with arrows:

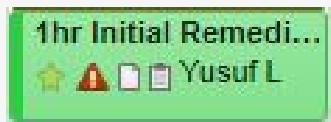
- CONFIRMED:** Points to a purple appointment at 10:00 AM in Room 12 for David P.
- UNCONFIRMED:** Points to a green appointment at 2:15 PM in Room 17 for Tim P.
- CLIENT PAID & CHECKED OUT:** Points to a blue appointment at 10:30 AM in Room 17 for Paula G.
- MARKED AS ARRIVED:** Points to a blue appointment at 12:15 PM in Room 13 for Rachel C.

The bottom of the interface features a navigation menu with options like Home, Reports, Classes, Appointments, Clients, Retail, and Sign Out. A footer indicates the software is powered by minareddy.

APPOINTMENT COLOUR GUIDE

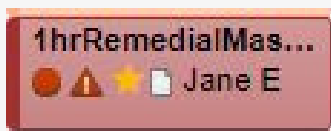
COLOUR

MEANING



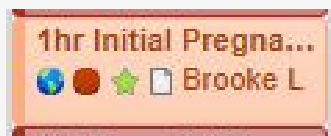
Initial Appointment

The client has not been to the clinic before



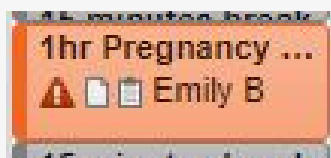
Existing client appointment

The client has been to the clinic before



Initial Pregnancy Massage

The new client is booking in for their first appointment as a pregnancy massage. You will need to ask them to fill out a new client form as well as a pregnancy form.



Pregnancy appointment

The client has been to the clinic before. Does not necessarily mean they have had a pregnancy massage before so it is always good to ask the question.

STATUS COLOUR GUIDE

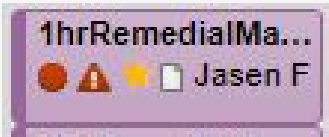
COLOUR

MEANING



Unconfirmed Appointment

The client has not confirmed that they will be attending their appointment. Ideally we do not see any of this colour on the diary on the diary of the appointment.



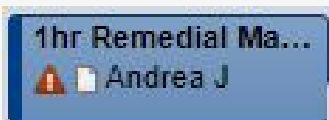
Confirmed Appointment

The client has either pre-confirmed their appointment by responding to one of our automated system messages, or we have verbally confirmed that they will be attending with them over the phone.



Marked as Arrived

The client has checked in at reception and we have marked them as arrived in the system.



Checked-out Appointment

The client has paid for their appointment and we have processed that payment in our system. All appointments including missed appointments or late cancellations should be blue at the end of the day.

SYMBOL GUIDE

SYMBOL

MEANING



Green Star

There is no visit history attached to this profile, so MB believes it is a new client.



Gold Star

Client has requested this therapist for this appointment.



World/Globe

Client has booked this appointment online through our website.



Orange Circle

Client has booked this appointment online through the MindBody App.



Client Alert

Client has important notes written in their alerts on their profile. These could be relating to health concerns or MALC offences.



Soap Notes

If this icon appears on an appointment, it means the therapist has begun or completed the treatment note for that session.



Appointment Notes

If this icon appears on an appointment, it means that there are notes attached relating to the specific appointment. This could be notes about the clients complaint, booking requirements, ect. The majority of appointments will have this symbol displayed.

SYMBOL**MEANING****Red Circle**

Appointment has not been paid for/checked-out.

**Calendar**

This client has multiple appointments booked on the same day at any clinic location. It is important to look out for these occurring on real client's appointments.

BLOCK OUTS

REASON	CLIENT	SERVICE	
Adding a break to a therapist's day.	BREAK, THERAPIST NAME	BREAK (select length of time)	8:30 AM - 60 minute ... ● 🗄️ BREAK B
If a therapist is sick	SICK, THERAPIST NAME	SICK	8:30 AM - Sick ● Sick S
If a therapist is being blocked off for a tutorial	TUTORIAL, TUTORIAL	TUTE	8:30 AM - Tute ● ⚠️ Tutorial T
If a therapist is being blocked off for a workshop	WORKSHOP	WORKSHOP	8:30 AM - Workshop ● Workshop W
If a therapist is being blocked off for a swap with another therapist	SWAP, SWAP	SWAP	8:30 AM - Swap ● SWAP S
If a therapist is being blocked off for a meeting	BREAK, THERAPIST NAME	Meeting	8:30 AM - Meeting ● ⭐ 🗄️ BREAK B
If a therapist is being blocked off for RDO	RDO, RDO	RDO	8:30 AM - RDO ● 🗄️ RDO R
If a therapist is being blocked off for time-off	Timeoff THERAPIST NAME	Select Time off Early, or Time off Late	8:30 AM - Time Off (I... ● Timeoff R
If a therapist is being blocked off for admin time	Admin Time	Admin	8:30 AM - Admin ● 🗄️ Admin T

THERAPIST NOTICE TIME

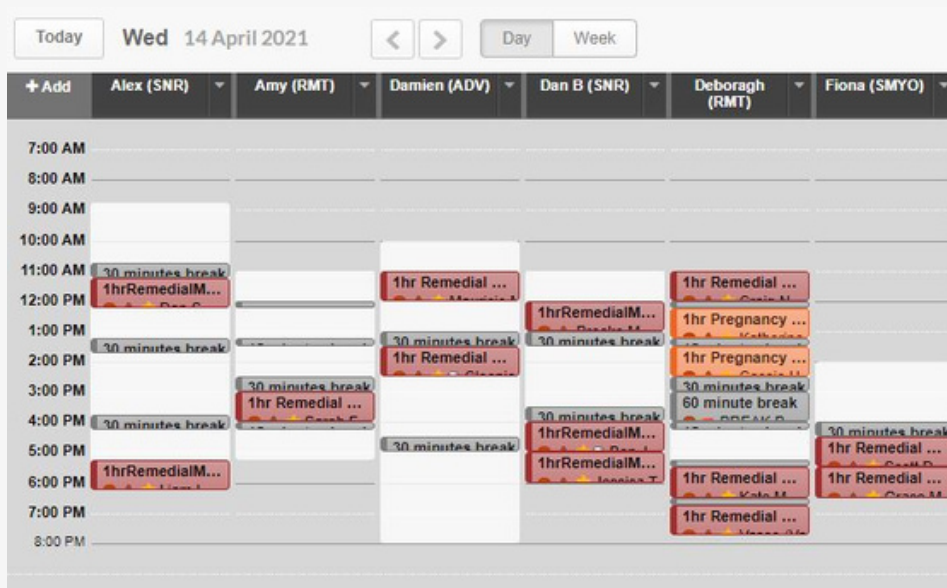
It is important for reception to be respectful of the notice time provided by a therapist when we are looking to book their 1st spot of the day. As all therapists are contractors, they do not have to be at the clinic unless they are treating. Notice time only applies for when we are looking to book the first appointment available for the current day. The notice time provided is the allotted time a therapist requires in order to be ready and arrive at the clinic.

WHERE TO FIND A THERAPIST'S NOTICE TIME

Therapists notice time can be found on their staff profile in MindBody, and on the team contact list. This information, along with phone numbers and new team members should be updated regularly and a copy kept printed at the reception desk for easy reference.

HOW TO USE A THERAPIST'S NOTICE TIME

For example: It is Wednesday 14th April, and a client calls up at 8am requesting an appointment for this morning.



While the white area on the diary shows all times that are available for treatment with a therapist, since we are booking an appointment for the current day we will need to take into account each therapist's notice time to ensure that they can make it to the clinic in time to see the client.

For this example, let's say that the notice times for the above therapists who have morning appointments available are:

Alex = 90mins
Amy = 2hrs
Damien = 2hrs
Dan B = 1hr

Referring to these notice times, we could offer a 10am appointment with Alex as the earliest available time as an appointment at 9am would fall within his notice period of 90mins.

Alternatively, I could offer 11am with either Amy or Dan B as this falls outside of their notice times. However; I would not be able to offer Damien's 10am time slot as this is entering his minimum notice time of 2hrs.

NOTIFYING A THERAPIST

If we are responsible for booking a therapist's first client of the day (on the day of treatment only) then we must contact them to let us know. Firstly, attempt to call the therapist directly on their mobile and leave a message if required. If you do not get to speak with the therapist directly, it is important to follow up with a burst sms as well.

VOICEMAIL SCRIPTING

*"Hi **THERAPIST NAME**,*

It's YOUR NAME, calling from NMK. We have booked your 1st client of the day in at (time) and just wanted to confirm your start time with you. If you can please call reception back to confirm that would be great. Thanks!"

SMS SCRIPTING

*Hi **THERAPIST NAME**,*

*Your start time today is **(time)** am/pm.*

Please call reception to confirm

Kind regards,

NMK

We do not need to contact a therapist if their appointment is booked online by a client. Appointments are available online 4 hours or more from the time of the appointment. Therapists are expected to check their schedule outside this 4-hour window. Reception only becomes responsible for managing these bookings and notifying therapists within the 4-hour window as only we are able to see and book these appointments in.

Similarly, we do not need to contact therapists if we book other appointments in their day that occur after a preexisting appointment. The therapist will already be at the clinic so they do not need to be notified or confirmed with.

KEY POINTS

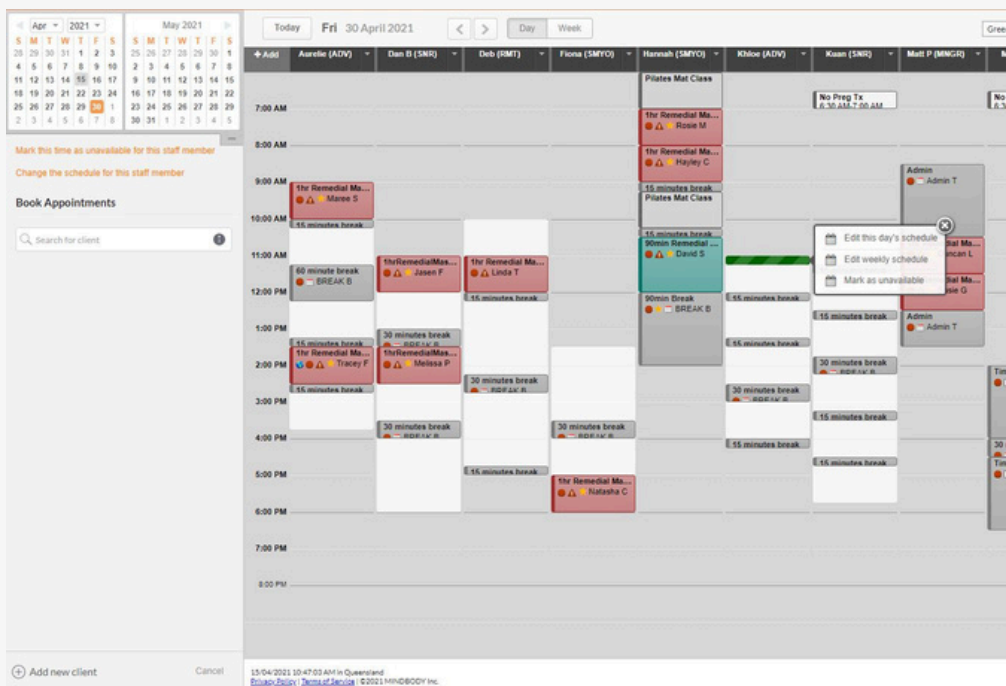
1. Do not book an appointment for a therapist within their notice time period. The therapist essentially becomes unavailable during this time!
2. If you book the first appointment of the day for the therapist (outside of the notice period) you must contact them and ensure that they will be at the clinic in time to treat.

BOOKING AN APPOINTMENT

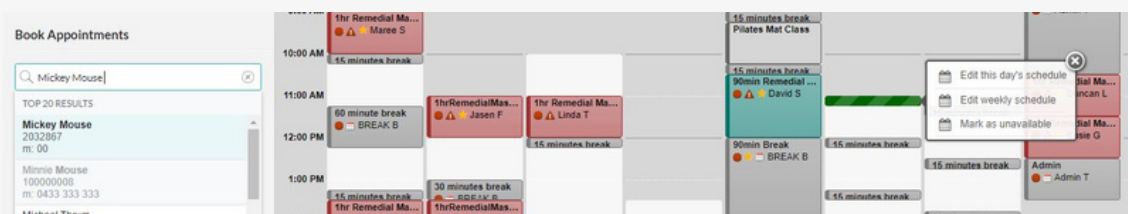
The following steps can be followed if you are booking an appointment for an existing client.

1) Click on the start time of where you want to book the appointment. You will see a green line appear to mark the timeslot.

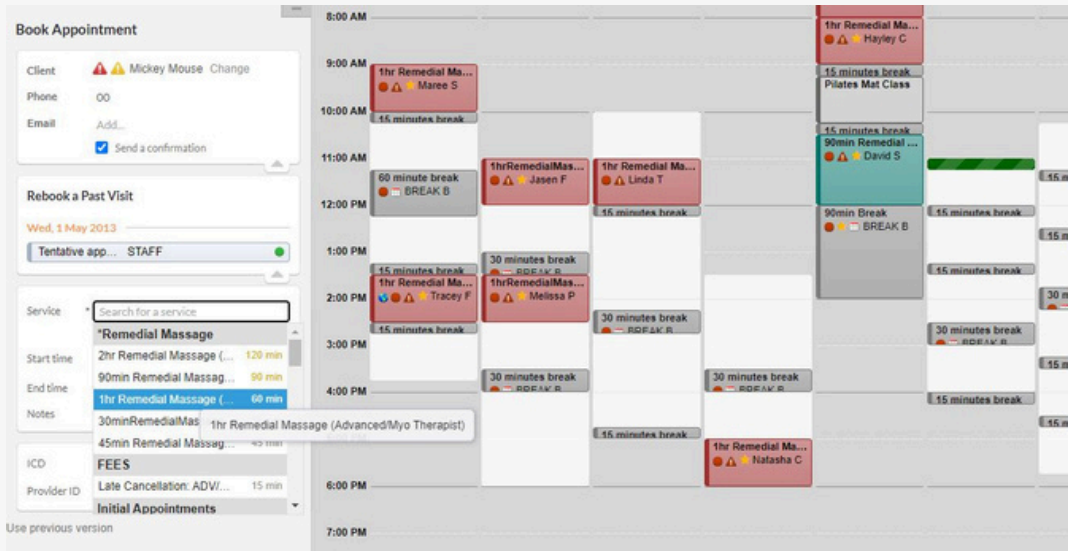
Remember, only the white space on the diary shows available appointment times.



2) Go over to the search bar on the left hand side of the screen under '**Book Appointments**'. Search for the client's profile here. It is always best to use a **mobile number** as this should be unique for every client. It is likely that we may have more than one client in our database with the same name.

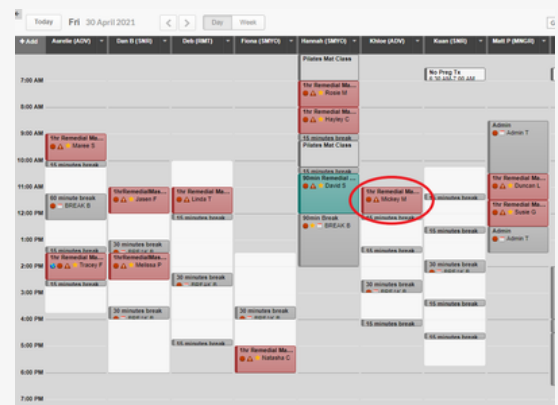
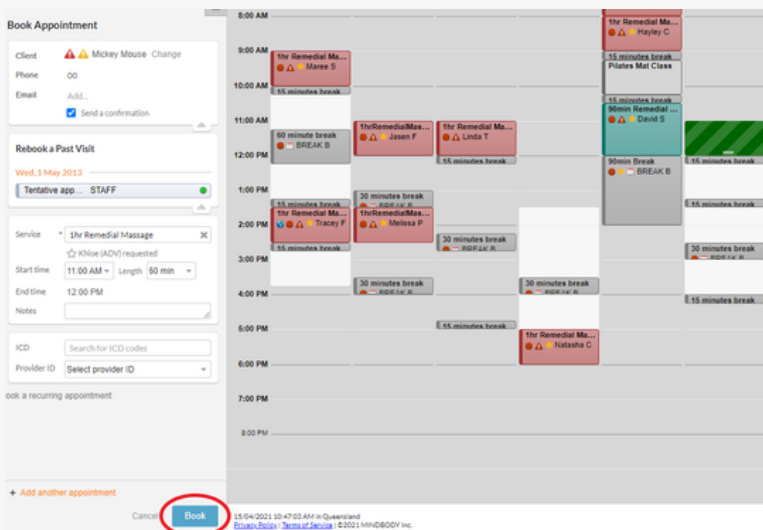


3) Once you have found the client you are looking for, click on their name as it appears. We will then need to select what type of appointment they are after. You can do this from the search bar next to **'Service'**. By clicking on the search bar a drop down list of all appointment options applicable to that therapist will appear. You can also start typing in the name of the appointment you are after to help narrow down your options.



3) Once you selected the service you are after you you need to book the appointment in. Do this by clicking the 'Book' button at the bottom of the page. It is best to lock this is as quickly as possible, so you do not loose that timeslot to someone else! At anytime, you may be competing for spots with clients online or with another receptionist. We can avoid awkward situations and disappointment by completing steps 1-3 as soon as possible!

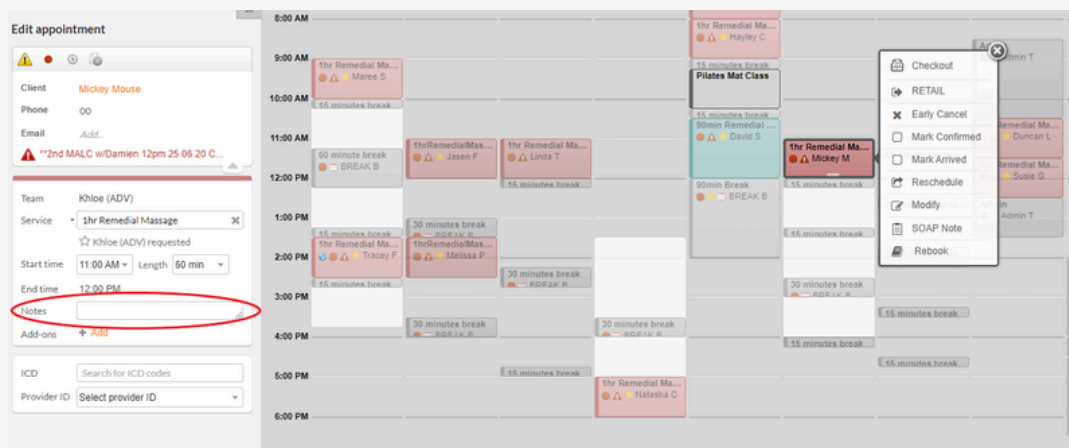
Once you have hit 'Book' you should see your appointment pop up in the diary.



4) While you are booking the appointment, you would have had discussion with the client around the following:

- Preference of day/time = the client may be limited by what days or time they can attend the clinic
- - Preference of therapist = the client may have specifically requested a particular therapist/s, or may have advised that they wish to only see a male/female therapist. They may also advise that they wish to only see a particular level of therapist. This could relate to cost or their reason for visit.
- - Reason for visit = the client will have a particular concern or area of the body they want treated, or it may be for general maintenance.

Anything about the client or the appointment that is note-worthy should be written down in the appointment notes. You can access this by clicking on the appointment, and typing them in to the text box on the left handside next to 'Notes'.



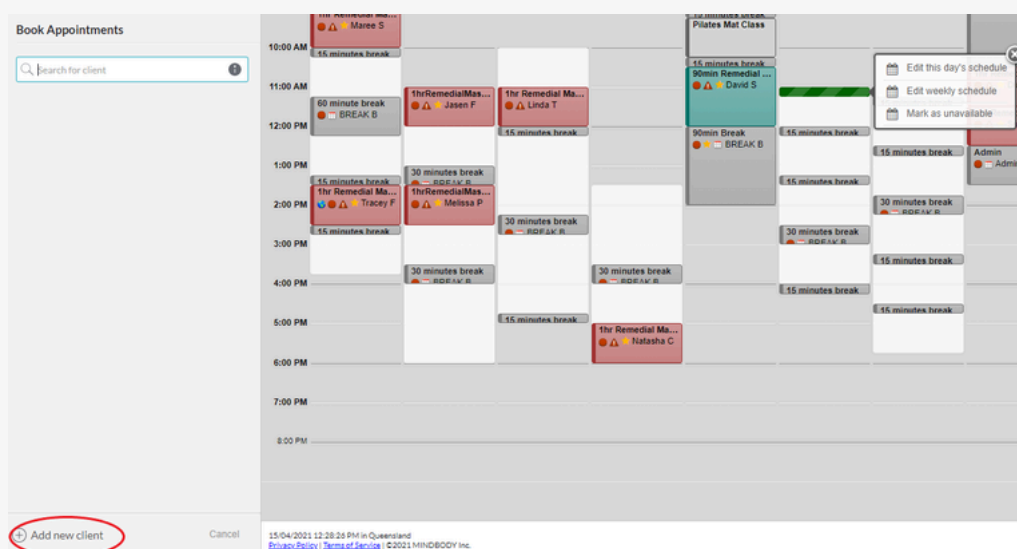
BOOKING AN APPOINTMENT FOR A NEW CLIENT

The following steps can be followed if you are booking an appointment for a new client.

1) Click on the start time of where you want to book the appointment. You will see a green line appear to mark the timeslot.

Remember, only the white space on the diary shows available appointment times.

2) Instead of searching for the client, we will need to create a new profile. To do this, click on 'Add new client' at the bottom of the left hand side of the screen.



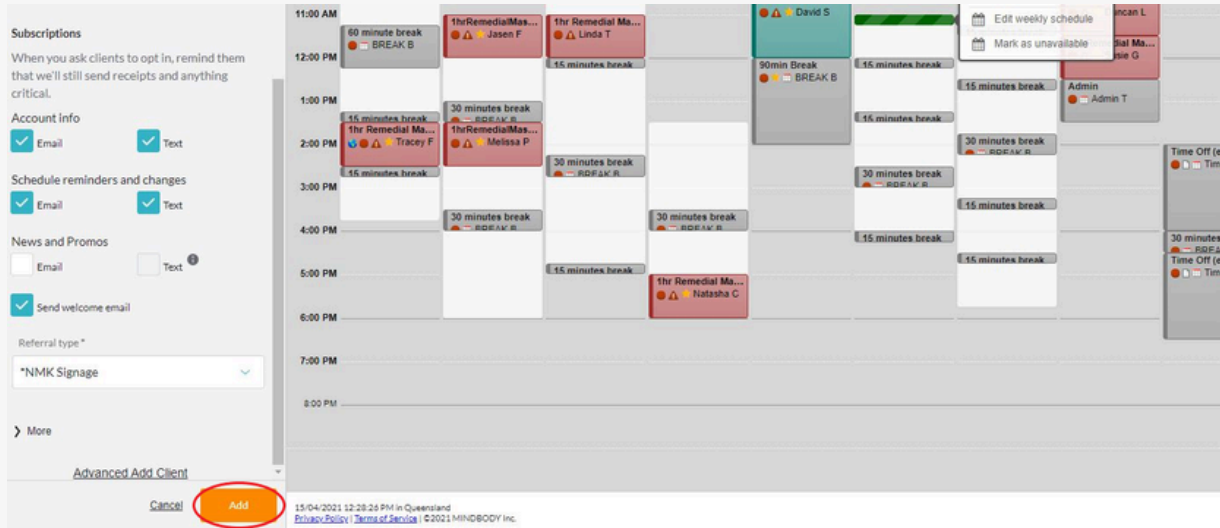
3) We then need to collect the following information from the client in order to create the profile. Each of these have an asterisk next to the field and you will not be able to move on to the next step if any of them are not filled in.

- First name
- Last name
- Mobile number
- Gender
- Referral type



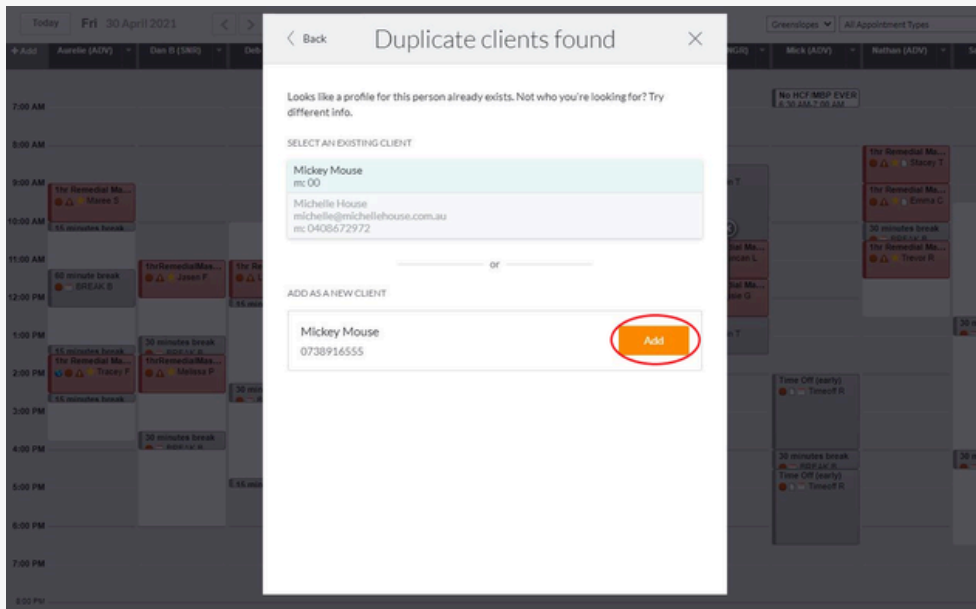
You will also need to ensure that text is ticked for all 'Subscription' settings. If we do not do this step, then the client will not receive any confirmation notice of their appointment. We have only collected their mobile number after all.

Once you have completed all the above, you can click 'Add' at the bottom of the screen.

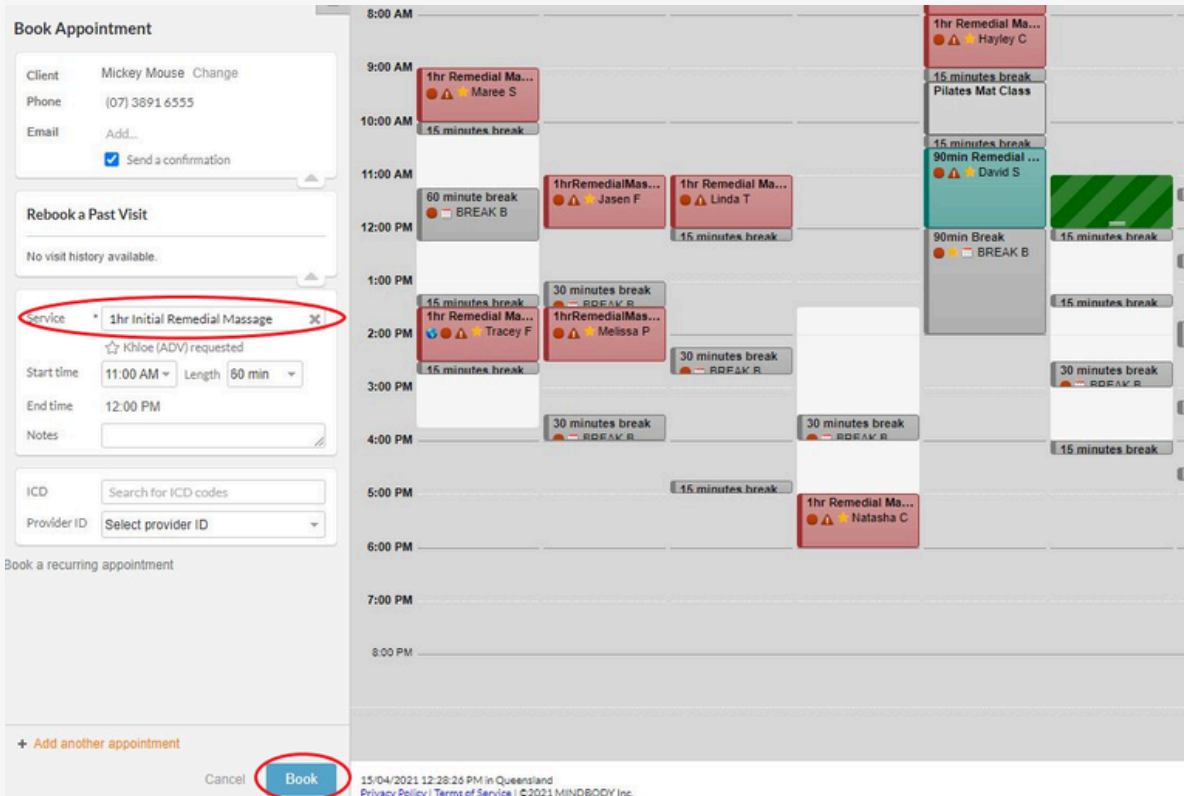


4) MindBody will then show you any Duplicate profiles it believes it has found. Its a good idea to take note of what pops up as it may be a duplicate profile (unlikely though if the client has said they have not been before!). MindBody finds matches from similar names and mobiles, so you may have multiple pop up and none of them be related at all.

Simply click 'Add' next to the new client's name.

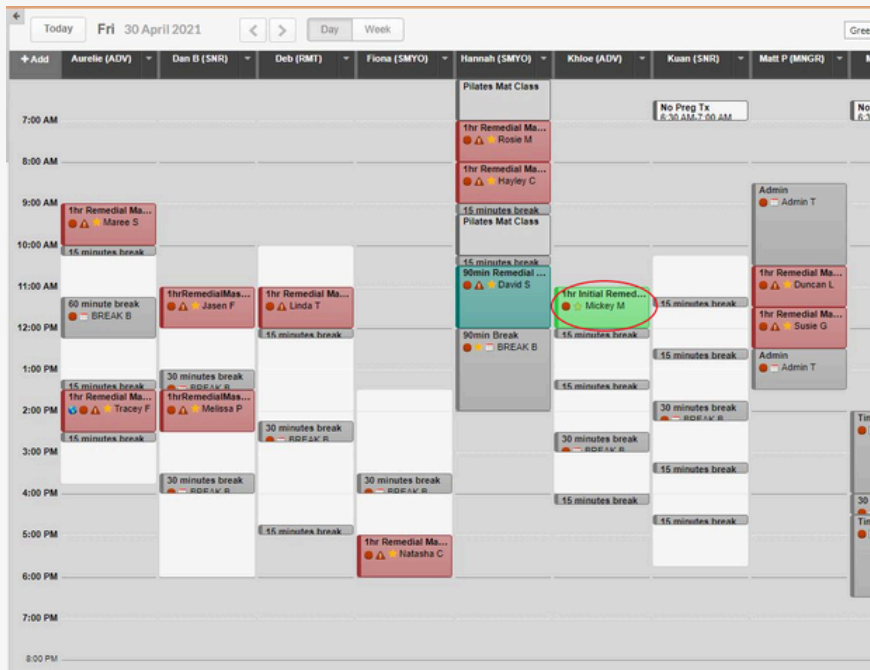


5) You will then be able to select the service type for the appointment. This will need to be "Initial". Then click 'Book' at the bottom of the page.



6) Done!

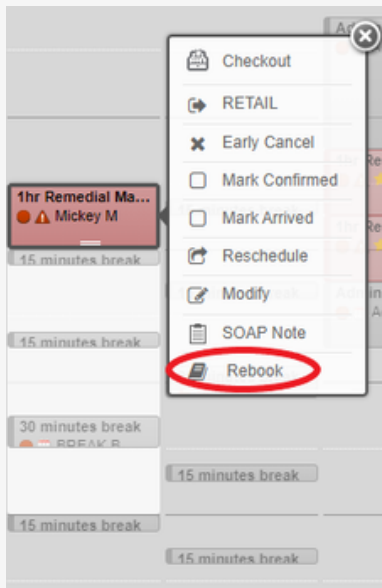
You should now see the appointment on the diary. Remember to get through steps 1 - 5 as quickly as possible so you do not run the risk of losing that spot to someone else. Then go back and write any notes that you need to on the appointment.



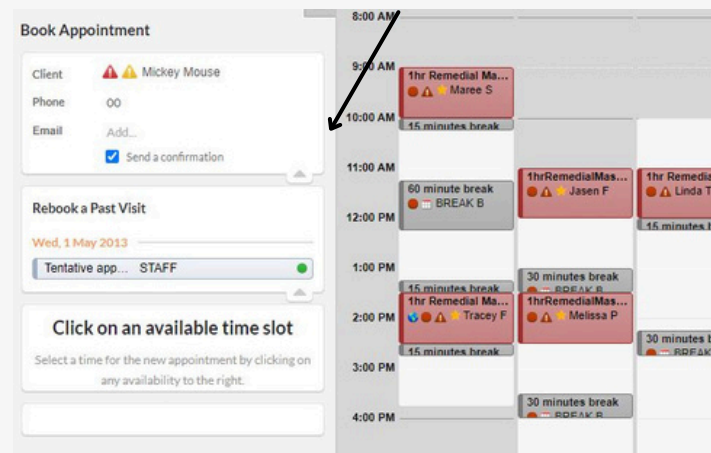
REBOOKING AN APPOINTMENT

This might be for someone who has come out of treatment and would like to rebook, or it could be for a client that has called up to cancel an appointment but would like to reschedule for another day.

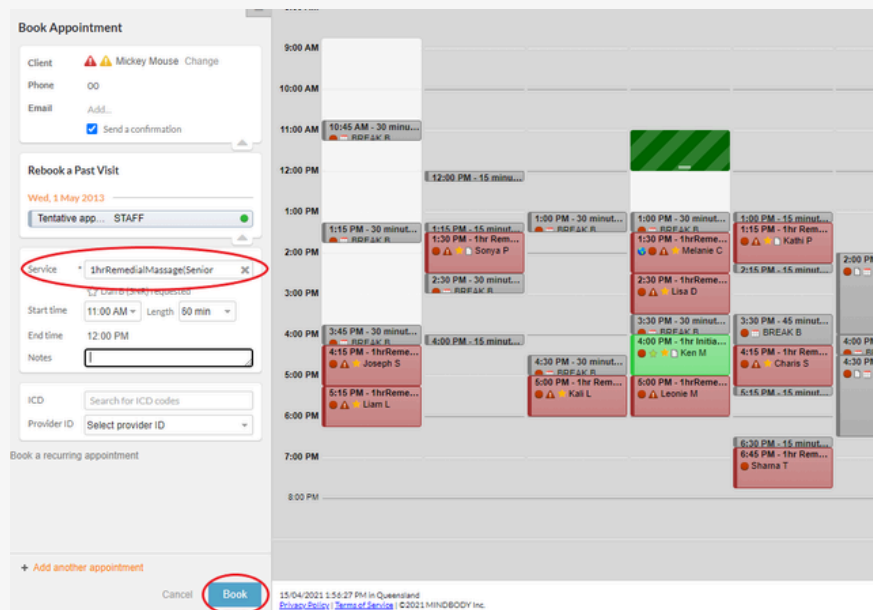
1) Find and click on the original appointment. In the menu that appears, click 'Rebook'.



By doing this MindBody will automatically grab the client information it needs to book the next appointment. You will see the information show up on the left hand side of the screen.



2) Find where we are rebooking/rescheduling to and follow the normal steps to book an appointment. All you should have to do is click on the diary, select a service type, and hit 'Book'.



***DON'T FORGET!** If you are rescheduling an appointment, you will need to go back and make sure to cancel the original booking!*

CANCELLING AN APPOINTMENT

There are two ways to cancel an appointment, and how we action it depends on the notice period. Our Cancellation Policy is 4 business hours. If a client notifies us that they wish to cancel an appointment with more than 4 business hours notice, then it is considered an Early Cancellation. If a client notifies us with less than 4 business hours notice to their appointment that they wish to cancel, then it is considered a Late Cancellation.

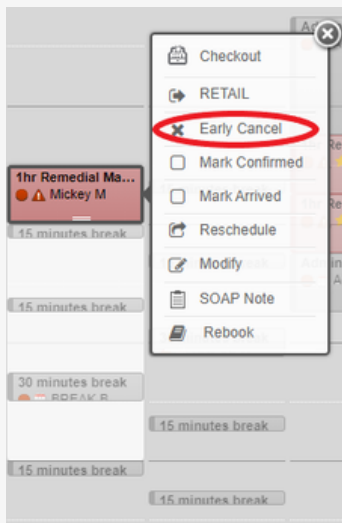
IMPORTANT REMINDER:

With any cancellation, early or late, our first priority is to offer to reschedule the appointment!

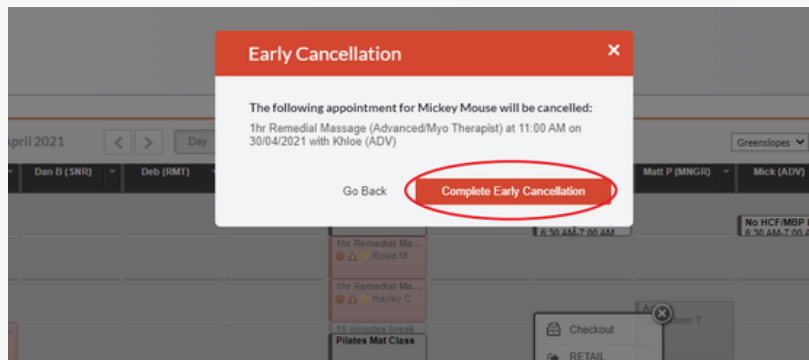
EARLY CANCELLATION

If a client cancels with more than 4 business hours notice of their appointment...

- 1) Find and click on the appointment in the diary (Be sure to confirm that that is the correct appointment! Even if the client has told you their full name and exactly when and where their appointment is, confirm the last three digits of their mobile number just to be sure.)
- 2) Click 'Early Cancel' from the menu.



You will then be prompted to confirm the cancellation. Click 'Complete Early Cancellation' and the appointment will disappear from the diary.



LATE CANCELLATION

If a client cancels with less than 4 business hours notice of their appointment...

- 1) Repeat step 1 from the 'Early Cancellation' process.
- 2) We want to keep a record of this appointment for reporting and fee's purposes, so instead of selecting a cancellation option from the menu, we will change the service type of the appointment to 'Late Cancellation'.

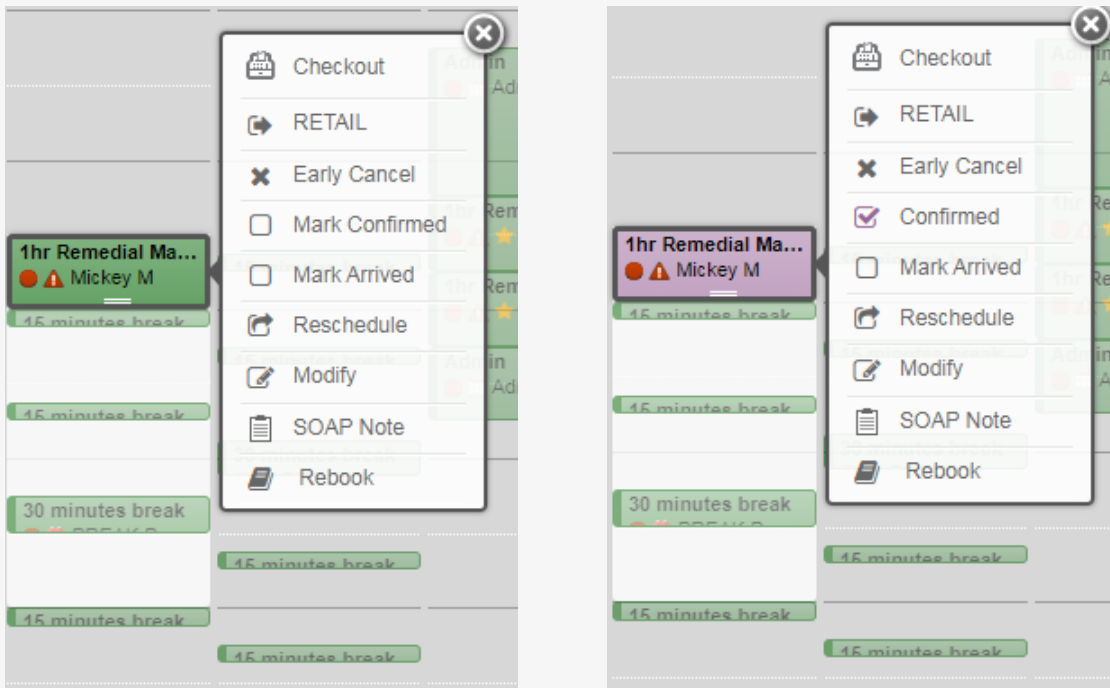
****See pg ... for more information on this process.****

MARKING A CLIENT AS CONFIRMED

It is important that we have clients confirming their appointments as this way we are assured as much as possible that they will be attending. When we do receive confirmation it is important that we mark that appointment as confirmed this way we do not continue to chase them. Ideally, if we were to look at the status mode of the day, we would see all prebooked appointments displayed in a light purple colour.

HOW TO MARK AN APPOINTMENT AS CONFIRMED

- 1) Make the view of the diary 'Status Mode'
- 2) Click on the appointment you wish to confirm. It will currently be displayed in a green colour.
- 3) Tick the box next to 'Mark Confirmed' and the colour of the appointment will change to a light purple.



WAYS AN APPOINTMENT CAN BE CONFIRMED

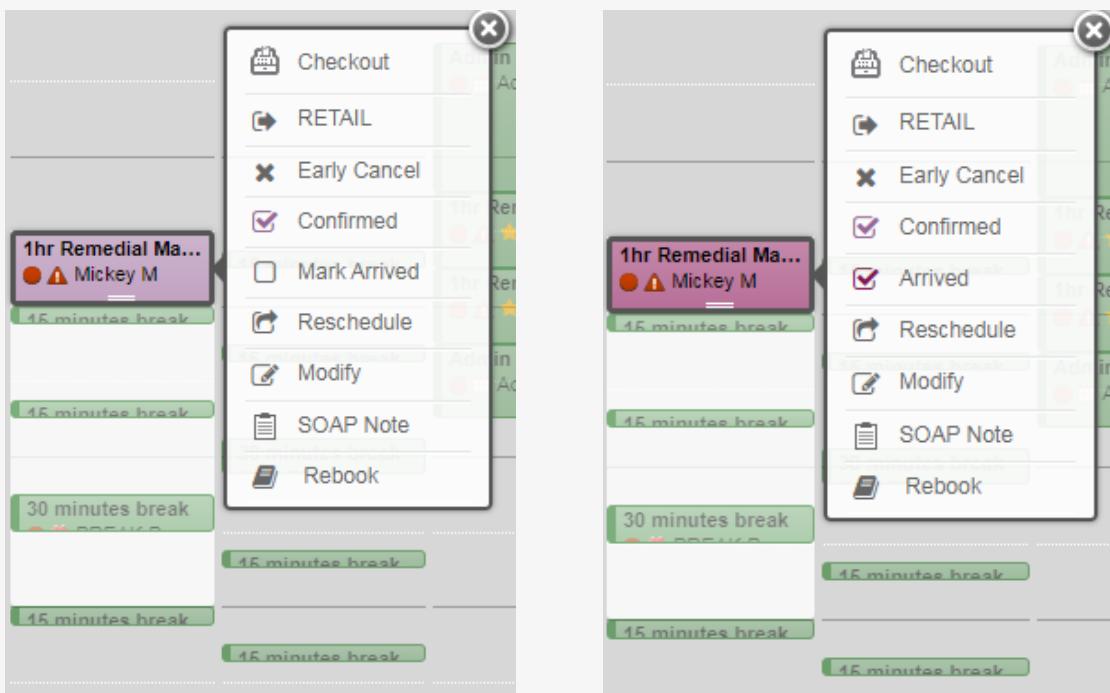
- A client correctly responds to the link in their confirmation email or text message. By actioning one or other of these the appointment will automatically be marked as confirmed in our system.
- A client answers or calls the clinic back in response to our Appointment Confirmation process (**see pg ...**). If this happens you will need to action the above steps to mark the appointment as confirmed.

MARKING A CLIENT AS ARRIVED

It is important that we mark each client as arrived in the diary when they check into the clinic. By doing this it helps both us and the therapist team keep track during busy times.

HOW TO MARK AN APPOINTMENT AS ARRIVED

- 1) Make the view of the diary 'Status Mode'
- 2) Click on the appointment you wish to mark as arrived. It could currently be displayed in either a green (if it is unconfirmed) or light purple (confirmed) colour.
- 3) Tick the box next to 'Mark Arrived' and the colour of the appointment will change to a light purple.



After we check in a client and mark them as arrived on the diary, we will need to make an announcement to the therapist. **(see pg ...)**

PROMO CODES

There are a number of different promo codes that we use for various reasons to apply a discount to the cost of a treatment. We use codes so we can then track how successful or commonly used a promo is. Below is the list of our standard promotions and their associated codes and meanings. Throughout the year, NMK may run a one-off promotion for an event and a unique code will be created and provided when that occurs.

PROMO	CODE TO ENTER	WHEN TO USE
BIRTHDAY DISCOUNT	BIRTHDAY20	This is a \$20 promotion that automatically gets emailed out to clients. Client must be subscribed to our marketing emails.
NMK TRIBE MEMBER	TRIBE15	This is a 15% discount on services that a client will receive if they present one of our TRIBE tags at reception.
BOOST MARKETING	BOOST20	This is a \$20 discount on 1hr services that a client MAY receive if we run this automation. Designed to help BOOST slow days. This may present itself in Mindbody with the note IMPORTANT: This client booked with Frederick offer \$20 off
12 WK RETURN	10OFF	This is a \$10 promotion that a client MAY receive via email if they haven't returned or engaged with the clinic in 12 weeks. The client must be subscribed to our marketing emails to receive. This campaign is set up in MINDBODY to try and re-engage "LOST" clients.

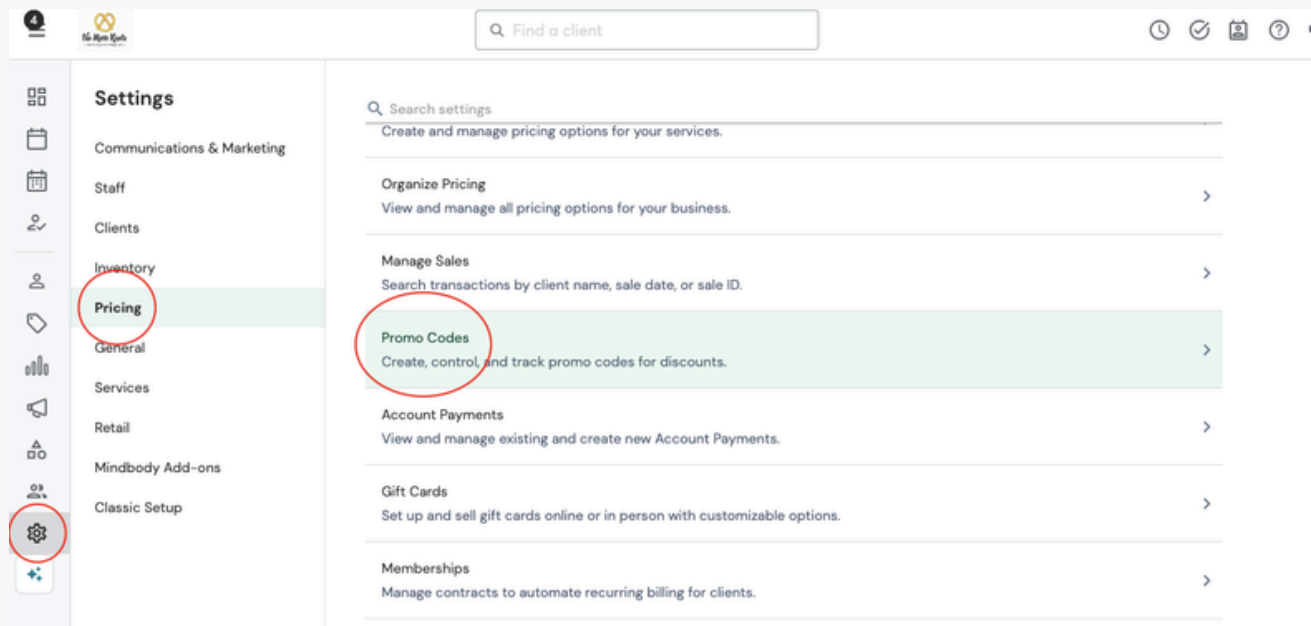
Please remember that these discounts are created as special PROMOTIONS. They are not vouchers, and therefore are not subject to the same terms and conditions as a GIFT VOUCHER would be.

For any NMK promotion, we are allowed to set the terms and conditions around the eligibility and expiry of said offer. While we may choose to make exceptions under particular circumstances, clients are not entitled to received the benefits of the promotion after it's expiry.

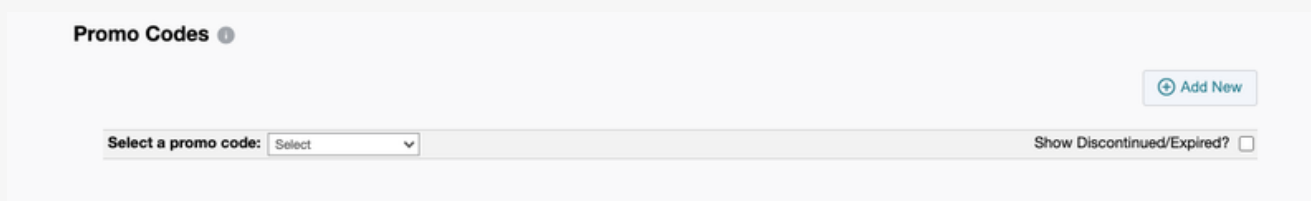
HOW TO EDIT/CREATE A PROMOTION

CREATING A PROMO CODE

In MINDBODY got to SETTINGS --> PRICING --> PROMO CODES



To view the details of an active promo code, select the option from the drop down list. To see any discontinued/expired promo codes, make sure you tick the button to include those options before viewing the list. To make a new code, click +ADD NEW



Fill in all the fields on the screen to customise the promotion. When you're done, click ADD.

Promo Codes ?

Promotion Name:

Promotion Code: [\[Generate Random\]](#)

Discount Type:

Discount Amount:

Discount Autopays: No Yes

Activation Date:

Expiration Date:

Max Number of Uses:

Days after Close Date:

Allow for Online Sales:

Valid Day(s): Sun: Mon: Tue: Wed: Thu: Fri: Sat:

Promotion Applies To: **Type**

Define Promotional Items

Type:

REPORTING ON PROMOTIONS

when offering a discount in line with a special offer or event, it's a good idea to create a promotion rather than just manually discounting the services, as we can run a report based on the promo code used and view how successful the offer has been.

To report on a particular favorite promotion, Go to INSIGHTS --> REPORTS --> Find the report PROMOTIONS

Home

Classes

Appointments

Check In

Clients

Point of Sale

Insights

Reports

Analytics 2.0 **New**

Analytics

Client Acquisition

Retention Marketing

Reports

Powerful reports that help you make informed business improvements. Use these reports to research sales trends, track popular services, identify big spenders, and much more.

Search Results

Promotions

See which clients used your promotion codes when making a purchase.

Saved

Fill in the details for the report:

- Date Range = the range of sales you want to look at
- Location = the sale location
- Select the specific promotion you want to report on

HIT GENERATE.

Reports » Promotions ★ Add to favorites

Start date: 1/01/2025 End date: 14/02/2025 Location: Greenslopes Birthday Promo Summary

←Y ←Q ←M ←D | ←Y ←Q ←M ←D | ←365 ←90 ←30 ←7
Calendar Months | To-Date | Rolling Averages

Tagged clients only (100352): Generate

Promotion	Quantity	Discount	Total
Birthday Promo	14	\$216.48	\$1,016.00

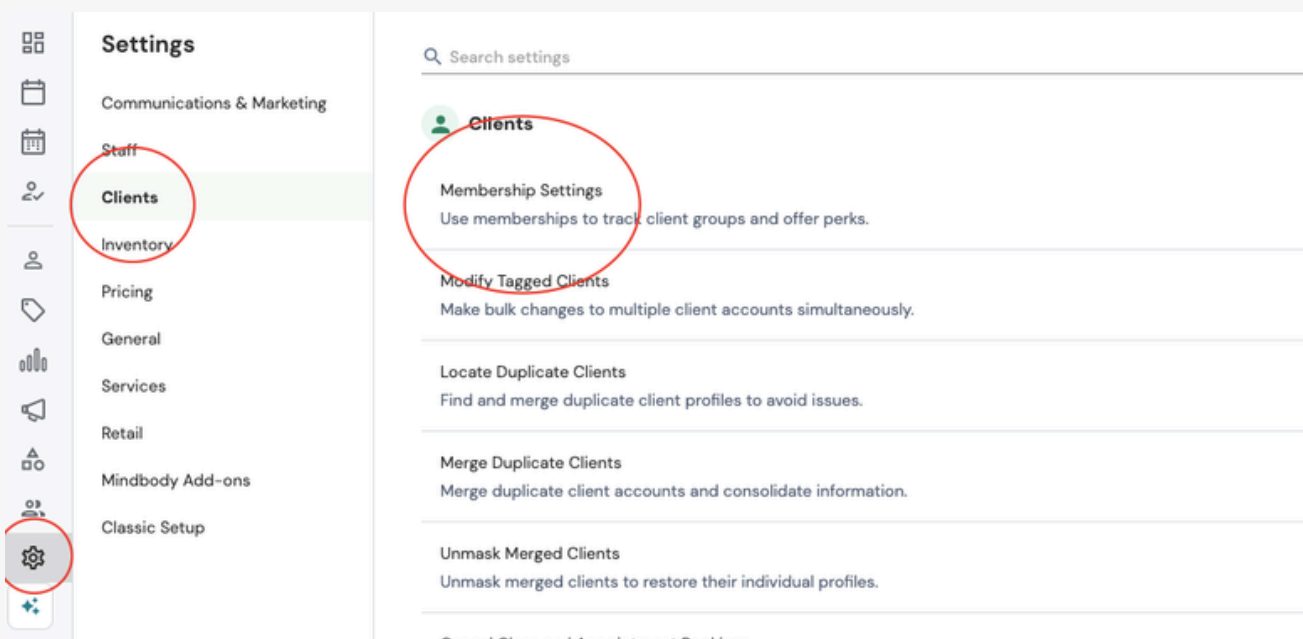
A summary view (above) will give you just the totals. A detailed view of the report will also show the list of clients.

DISCOUNT GROUPS

There are a number of different discount groups set up in MINDBODY in order to allocate such as the NMK TEAM, RED DOG, and AMBASSADOR groups. These groups have been allocated set discounts for being part of a particular agreement with the clinic. and to ensure that they receive their benefits every time, we have created a membership style product within the system. Once a client has been allocated to the discount group it will automatically calculate any discounts to service or products owed every time. We can also run reports by looking only at members of each particular group.

CREATING A NEW DISCOUNT GROUP (OR EDITING AN OLD ONE)

Go to MINDBODY --> SETTINGS --> CLIENTS --> MEMBERSHIP SETTINGS



Select the current discount group from the drop down list to view the details. If you want to make any changes, do this here and then click SAVE down the bottom of the screen.

Select ADD NEW to create new one. Complete the fields, and hit SAVE.

Membership Settings

General Setup & Options Class and course Options Appointment Options **Membership Settings** Words and Phrases

Select Membership Tier: **NMK Ambassador** Show Inactive:

MEMBERSHIP INFORMATION

Membership Name: **NMK Ambassador** Active: [\[Pricing Options & Memberships\]](#)

Sort Order / Priority:

Membership Icon:

MEMBERS ONLY DISCOUNT

Members Discount for Retail: %

Members Discount for Services: %

MEMBERS SCHEDULING

Online Booking Restricted to Our Members Only:
 Myotherapy
 *Remedial Massage
 Pregnancy Massage
 Z RECEPTION Z

Allow Early Access Booking: Schedule Window is currently set to Rolling

Allow Priority Waitlisting:

If you are creating a new discount group, we will now need to create a matching pricing option in order to “sell” this product to clients.

Go to SERVICES & PRODUCTS --> PRICING --> and select ADD PRICING OPTION

- Home
- Classes
- Appointments
- Check In
- Clients
- Point of Sale
- Insights
- Marketing
- Services & Products
 - Classes
 - Appointment Types
 - Courses
 - Retail Products
 - Pricing
 - Arrivals
 - Contracts

Pricing

Rate this page More [Add pricing option](#)

Listed below are the various ways that clients can pay for services at your business. Use this list to view and manage all your pricing options from a single spot.

<input type="checkbox"/>	Edit selected	Manage	Organize	Search all pricing options		Search	Filter by
	Pricing Option Name	Sessions	Service Type	Service Category	Price	Sold Online	Promoted
<input type="checkbox"/>	90min Remedial Massage (ADV)	1	Appointments	*Remedial Mass...	\$ 195.00		
<input type="checkbox"/>	90min Remedial Massage (RMT)	1	Appointments	*Remedial Mass...	\$ 168.00		
<input type="checkbox"/>	90min Remedial Massage (RMT)	1	Appointments	Downstairs Room	\$ 168.00		
<input type="checkbox"/>	90min Remedial Massage (SNR)	1	Appointments	Downstairs Room	\$ 178.00		
<input type="checkbox"/>	90min Remedial Massage (SNR)	1	Appointments	*Remedial Mass...	\$ 178.00		
<input type="checkbox"/>	90min Subsequent Myotherapy...	1	Appointments	Myotherapy	\$ 195.00		
<input type="checkbox"/>	90min Subsequent Myotherapy...	1	Appointments	Myotherapy	\$ 178.00		
<input type="checkbox"/>	Admin	1	Appointments	Z BREAK Z	\$ 0.00		
<input type="checkbox"/>	ADV 1hr Late Cancellation Fee	1	Appointments	FEES	\$ 32.00		

Complete all fields.

Name your new pricing option in line with the name of the discount group to avoid confusion.

Make the price \$0.00 and select Discount Groups as the Revenue Category

Make sure you select the matching discount group from the Membership list.

The screenshot shows a form for configuring a pricing option. The following fields are circled in red:

- Pricing option name: Brisbane Run Squad
- Type of service: Arrivals
- Appt Type: Discount Groups
- Price: \$ 0.00
- Revenue category: Discount Groups
- Membership: Brisbane Run Squad (optional)

Other visible fields include: Tax (GST checked), Expires (365 Months after the sale date), Number of sessions (Single session selected), Is this an introductory offer? (No selected), and Only allow clients to purchase this in a membership or package? (No selected).

If your discount group is providing a discount on any services, you will need to go through the service list and make sure to apply this discount group to each individual service that applies.

Go to SERVICES & PRODUCTS --> APPOINTMENT TYPES --> work your way through the list with all services that apply. You will need go to the ADVANCED SETUP Option for each one.

Where there is the list for 'APPLY MEMBER DISCOUNTS', make sure your new discount group has been selected.

The screenshot shows the 'APPLY MEMBER DISCOUNTS' section. It includes a dropdown menu for 'Trade' with options: NMK Team, VIP 10, and VIP 5. The 'Apply member discounts' field is highlighted in grey, indicating it is selected.

**If you ever find yourself retailing a service for a client with a discount group and find that the assumed discount is not automatically calculating at the checkout screen, the issue is likely that this step has not been completed for that particular service.*

ADDING A CLIENT TO A PARTICULAR DISCOUNT GROUP

To add a client to a discount group, you will need to “SELL” the product to them.

Go to the POINT OF SALE SCREEN --> Select your client --> Under SERVICES --> Select DISCOUNT GROUP --> Select the discount group you want to add --> Add the item to the cart --> use CREDIT JOURNAL as the payment method and SAVE CHECKOUT.

The screenshot shows the 'Point of Sale' interface. At the top, there's a search bar for the client making a purchase, with buttons for 'Add new client' and 'Walk-in Sale'. Below this, there's a section for 'Open Tickets' with a 'New ticket' dropdown and a 'Lookup' button. The main area is divided into two panes. The left pane, titled 'TICKET', shows 'SLEEPING BEAUTY' as the current client, with options to 'Assign Gift Card' and 'Assign'. It also displays 'Current series: None'. The right pane, titled 'Add Item', has tabs for 'Products', 'Services', and 'Payments/Gift Cards'. Under 'Services', there's a 'Select Service' dropdown set to 'Discount Groups' and an 'Item Name' dropdown. A dropdown menu is open for 'Item Name', listing several discount groups: '--- Select Item', 'Brisbane Run Squad', 'Brisbane Run Squad Ambassadors', 'NMK Ambassador Group', 'NMK Team', 'RDTT Ambassador Group', 'Red Dog', 'Trade', 'VIP 10', 'VIP 5 / NMK Friends', and 'VIP25'. At the bottom, a summary table shows 'SUBTOTAL \$0.00', 'DISCOUNT \$0.00', and 'GRAND TOTAL \$0.00' (incl. tax of \$0.00).

SUBTOTAL	DISCOUNT	GRAND TOTAL	incl. tax of \$0.00
\$0.00	\$0.00	\$0.00	

REPORTING WITH DISCOUNT GROUPS

If you ever want to run a report ONLY looking for data with particular group members, you simply need to create a TAG GROUP just for them.

Go to the CLIENT DIRECTORY

1. Clear any current data
2. Open up the 'ALL NON-MEMBERS & MEMBERS' drop down list and select the group you want to focus on.
3. Click the YELLOW TAG BUTTON
4. Now go to REPORTS --> run any report that you like, making sure to tick the button for RUN TAG GROUP ONLY. This will ensure that you only see any data from that report, relevant to the members of your tag group.

Client Directory

More ▾

▼ Saved

▼ Filters

Reset Search

Client info: All Relationships ▾ All locations ▾ All clients ▾ Any gender ▾

Clients w/ an alert Clients w/ a staff alert Suspended clients Clients w/ Clients without a referral Tagged clients only (0)

Age: -- ▾ To -- ▾

Sales Info: Any contact log status ▾ Profile creation date: To

First contact date: To Expected close date: Actual close date: To

Client Indexes: All Private Health Fund ▾ All Main Reason For Visit ▾ All

Liability Waiver: Any status ▾

- ✓ All non-members & members
- All non-members
- All members
- NMK Ambassador
- RDTT Ambassador
- Red Dog
- NMK Team
- Trade
- Brisbane Run Squad
- VIP 5
- VIP 10
- VIP 25

Search client by All fields ▾ My Location ▾ Search Add New Client

RECURRING BOOKING

Recurring bookings are an easy way to schedule multiple of the same appointment over a long period of time. This process is used when setting the breaks in a therapist's ongoing schedule. It can also be used if a client wanted to schedule the same type of appointment with the same therapist on a recurring basis.

HOW TO MAKE A RECURRING BOOKING

Book Appointment

Client Mickey Mouse [Change](#)

Phone 00

Email Add... Send a confirmation

Rebook a Past Visit

Wed, 1 May 2013

Tentative ap... STAFF

Service * 1hrRemedialMassage(Senior)

☆ Adrienne (MYO) requested

Start time 12:00 PM+ Length 60 min

End time 1:00 PM

Notes

ICD

Provider ID

Book a recurring appointment

+ Add another appointment

Cancel

30/04/2021 12:43:19 PM in Queensland
[Privacy Policy](#) | [Terms of Service](#) | ©2021 MINDBODY

1) Go through the steps of booking the first appointment as normal. Instead of clicking 'Book' to book a single appointment, click on 'Book a recurring appointment' just above it.

2) You will then see your options to set the day, frequency, and date range of the appointment. Once you select all of these you can see the total available that match your filters by clicking 'Check for Unavailable Dates'.

). There are also checkboxes for 'Apply payment' and 'Active Pricing Option No'."/>

Appointment Details

Client Mickey Mouse

Therapist Adrienne (MYO)

Location Newmarket

Start time 12:00 pm

End time 1:00 pm

Service category *Remedial Massage

Appointment type 1hrRemedialMassage(Senior Remedial/Myo Therapist)

Notes

Select recurring options

Select days

Sun Mon Tue Wed Thu Fri Sat

Book this appointment every 1 Week(s)

Start date 30/06/2021

End date

Status Confirmed? Arrived?

Apply payment Active Pricing Option No

[< Back](#)

3) MB will show you if there are any dates within your selection that are not available. When you are happy with your choice click 'Book Recurring Appointment' to book all available options.

Appointment Details	
Client	Mickey Mouse
Therapist	Adrianne (MYO)
Location	Newmarket
Start time	12:00 pm
End time	1:00 pm
Service category	*Remedial Massage
Appointment type	1hrRemedialMassage(Senior Remedial/Myo Therapist)
Notes	<input type="text"/>
Select recurring options Select days Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/>	
Book this appointment every	1 <input type="text"/> Week(s) <input type="text"/>
Start date	30/06/2021
End date	31/12/2021
Status	Confirmed? <input type="checkbox"/> Arrived? <input type="checkbox"/>
Apply payment	<input type="checkbox"/>
Active Pricing Option	No
<input type="button" value="Book Recurring Appointment"/>	
< Back	

Unavailable Dates
 All dates available!

Total # of appts 27

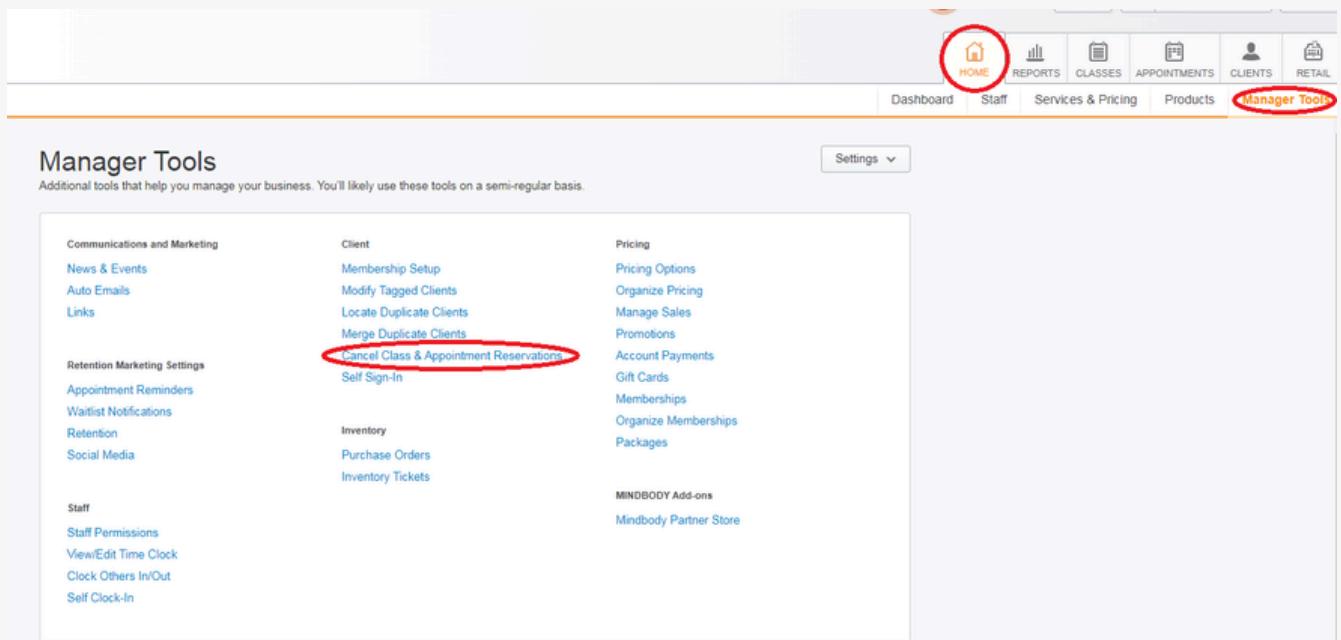
****Please note: This is only a suitable option if the service type and time allocated for all appointments will be the same****

CANCELLING A RECURRING BOOKING

When we are looking to use this function we are generally considering changes to a therapist's ongoing schedule.


CANCELLING A RECURRING BOOKINGS


1) Select 'Home' --> 'Manager Tools' --> 'Cancel Class & Appointment Reservations'



2) CAREFULLY select the date range, corresponding start and end times, and day that the recurring appointment in question is scheduled. Make sure to then select 'Appointments' as the 'Type', and the correct Therapist and Location that the appointment is scheduled for. Then hit 'Preview Cancellation'

Cancellation Options

Start date:  Start time:

End date:  End time:

Days: Sun: Mon: Tue: Wed: Thu: Fri: Sat: (leave blank for all days)

Types:

Staff: Location:

Client(s): All
 Selected:

Cancellation Method: Early Cancel (not charged) Late Cancel (charged)

Reason for Cancellation:

3) You will then get to see the list of appointments that fall within the filters you have assigned.

For this example, I have chosen to look at Jaime's 15min breaks scheduled at 12:15pm every Friday at Newmarket from the 21st May to the end of June.

Cancellation Options

Start date:
Start time:

End date:
End time:

Days: Sun: Mon: Tue: Wed: Thu: Fri: Sat: (leave blank for all days)

Types:

Staff:
Location:

Client(s): All
 Selected:

Cancellation Method: Early Cancel (not charged) Late Cancel (charged)

Reason for Cancellation:

Date	Time	Type	Location	Therapist	Client
21/05/2021	12:15 pm	Z BREAK Z	Newmarket	Jaime (SNR)	BREAK BREAK
28/05/2021	12:15 pm	Z BREAK Z	Newmarket	Jaime (SNR)	BREAK BREAK
4/06/2021	12:15 pm	Z BREAK Z	Newmarket	Jaime (SNR)	BREAK BREAK
11/06/2021	12:15 pm	Z BREAK Z	Newmarket	Jaime (SNR)	BREAK BREAK
18/06/2021	12:15 pm	Z BREAK Z	Newmarket	Jaime (SNR)	BREAK BREAK
25/06/2021	12:15 pm	Z BREAK Z	Newmarket	Jaime (SNR)	BREAK BREAK

4) When you are positive that you wish to bulk cancel all the appointments that show within the preview list, click '**Execute Cancellation**'.

MERGING DUPLICATE PROFILES

No More Knots has an extremely large database of active clients. It is important we have all the information relating to an individual client accessible through the one profile. This includes visit history, purchase history, client medical information and treatment notes. We need to be able to quickly review and access this information without switching through multiple accounts.

HOW DUPLICATE PROFILES OCCUR

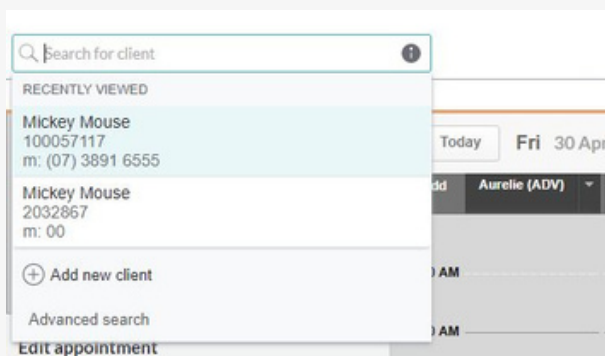
Duplicate profiles can occur in the system in a few ways:

- Reception creates a new one not realising there is an existing file in place. *Maybe the client had purchased a voucher or product from us before, but never had a treatment.*
- A client books online for the first time. *They may be an existing client, but the first time they book through the website they will be directed to create a login. This log in creates a brand new profile.*
- A client forgets their password, so they create a new account. *They may be unsuccessful in their attempts to reset their password so instead they choose a new login in. This new login will create a new profile.*

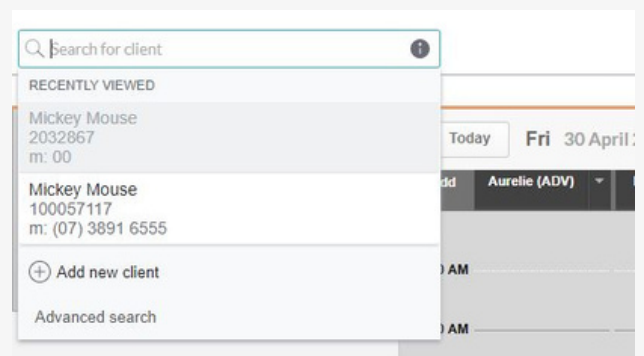
WHAT TO DO IF DUPLICATE PROFILES ARE FOUND

When you notice more than 1 profile for the same client come up, we need to merge them! It is very important that we do check and confirm that they actually are the same client (*not just clients with the same name*) through all contact information. This would include, mobile number, email, address, DOB.

In order to be able to merge client files, all files must be active.



e.g. Two active files. These can be merged now.



*e.g. One active file, and one deactivated file. The deactivated file will need to be reactivated in order to merge, *Client files will automatically deactivate if the client has not been to the clinic in 3 years.**

ACTIVATING A PROFILE

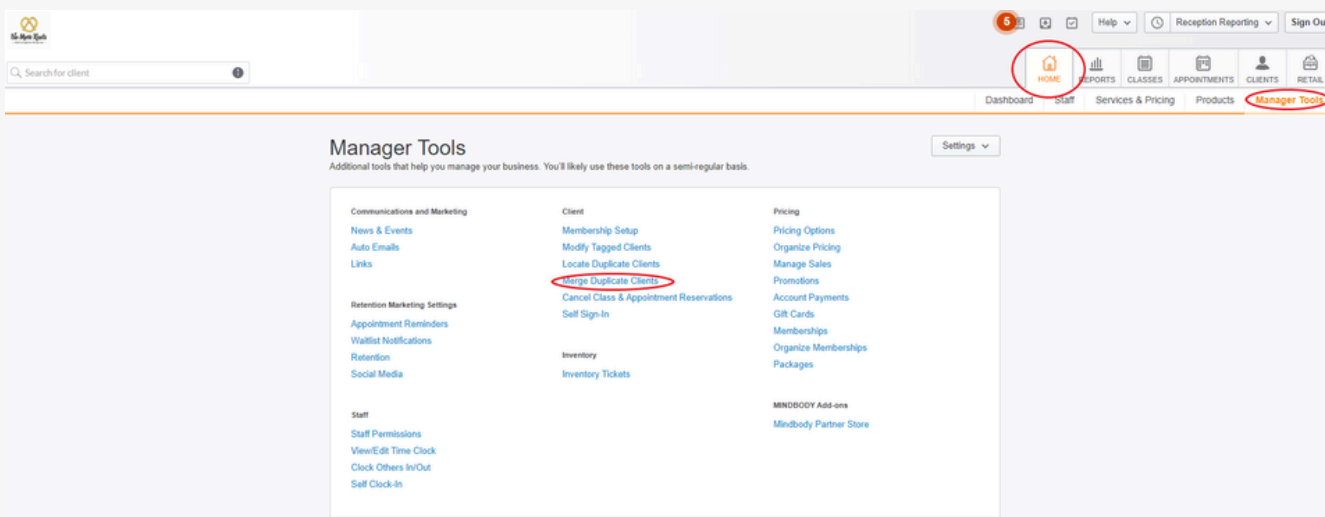
To activate a deactivated profile we need to go into the profile.

- 1) Click on the deactivated profile (greyed out one).
- 2) Go to 'Client Info' and click 'Activate'.

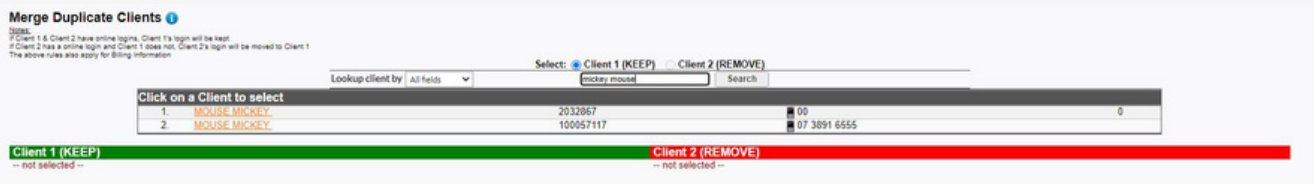


MERGING PROFILES

- 1) Go to 'Home' --> 'Manager Tools' --> 'Merge Duplicate Clients'



- 2) Search for profiles you wish to merge (*Make sure to get the right ones! We can't unmerge files*).



You can only merge two profiles at a time. The first one you click on will automatically fill the side for 'Client 1' which is the keep side. The second file you click on will automatically fill the side for 'Client 2' which is the remove side.

Which file you want where will entirely depend on the information associated with both.

Any writing that appears in **red** will be deleted from the REMOVE side. All black text, visit and payment history, and documentation will be merged together.
 If both profiles have online logins, then online 'Client 1' s will be kept.
 If only 'Client 2' has a login, then it will be merged across.
 The same rules for billing information apply.

Merge Duplicate Clients

Notes:
 Client 1 & Client 2 have online logins. Client 1's login will be kept.
 If Client 2 has a phone login and Client 1 does not, Client 2's login will be moved to Client 1.
 The above rules also apply for Billing Information.

Lookup client by: All fields | Select: Client 1 (KEEP) Client 2 (REMOVE) | Search

← Switch Client 1 with Client 2 →

Client 1 (KEEP)	Client 2 (REMOVE)
SYSID: 30694	SYSID: 100057117
Facebook ID:	Facebook ID:
ID: 2032867	ID: 100057117
First name: Mickey	First name: Mickey
Middle name:	Middle name:
Last name: Mouse	Last name: Mouse
Address:	Address:
City:	City: Greenslopes
State/Province: Select State/Prov	State/Province: QLD
Postal code:	Postal code:
Home phone:	Home phone:
Mobile phone:	Mobile phone: 07 3891 6555
Work phone:	Work phone:
Work Ext.:	Work Ext.:
Fax number:	Fax number:
Email:	Email:
Birthdate:	Birthdate:
Login:	Login:
Secret Code:	Secret Code:
Referral Type: Select referral type	Referral Type: *NMK Signage
Client Notes: Notes: 15/03/2013, Minnie had mice ms	Client Notes:
Alert: Supa Signage	Alert:
Client Indexes: Main Reason For Visit: n/a Private Health Fund: n/a	Client Indexes: Main Reason For Visit: n/a Private Health Fund: n/a
Billing Information Keely Jover 7 Eromba Crescent Fenny Hills, QLD 4055 Ulva	Billing Information -- No Billing Information --

3) When you are certain of your decision to merge the profiles as they are, scroll down to the bottom of the page and click 'Merge'.

1/10/2018 10/2/2018 20/12/2017

NMK Membership 1 per Month w/ RMT
 NMK Membership 1 per Month w/ RMT

Uploaded Documents -- No Uploaded Documents --

Uploaded Documents -- No Uploaded Documents --

Merge Clients

RAVING FAN EMAILS

The Raving Fan report is run every second Thursday on the pay week and reflects the business stats for each therapist. We record the statistics for each individual therapist on the following areas:

RAVING FANS = Clients who rebooked in the last fortnight

RETENTION STATS = Increase in bookings from 6wks prior

APPOINTMENT METRICS = Shows which therapist is relying on daily bookings and who is rebooking consistent clients

The Raving Fan emails are sent to each therapist from reception which display their stats for their own record. These stats are important in reflecting the therapists progress and client base and the practice managers refer to them in their annual reviews.

For the emails, you will receive an email template and two excel documents containing their stats. The process of sending out the email simply includes copying the correct data for the therapist into the appropriate sections of the email and sending it off!

EMAIL TEMPLATE

Hi There **{THERAPIST NAME}**,

We hope you are having a great week. So, below are your personal business stats for the fortnight **{DATE RANGE}**.

A very big thank you for everything you have done for our clients and for what you have brought to the clinic in the past two weeks! Have a fab day!

RAVING FANS STATS	
Dates: {DATE RANGE}	
TOTAL EXISTING CLIENTS	
Total Clients:	
Total Rebooked:	
%:	
TOTAL NEW CLIENTS	
Total Clients:	
Total Rebooked:	
%:	
GRAND TOTAL CLIENTS	
Total Clients:	
Total Rebooked:	
%:	
YTD Average	

BOOKING/APPT STATS	
Total Gold Star Requests	
% of Total bookings	
Total Same Day Bookings	
% of Total bookings	

6 WKLY RETENTION STATS	
Dates: {6wk DATE RANGE}	
TOTAL EXISTING CLIENTS	
Total Clients:	
Total Returned:	
%:	
TOTAL NEW CLIENTS	
Total Clients:	
Total Returned:	
%:	
GRAND TOTAL CLIENTS	
Total Clients:	
Total Returned:	
%:	
YTD Average	

FILLING OUT THE EMAIL

- 1) Copy and paste the template into a fresh email.
- 2) Change {THERAPIST NAME} to be the first name of the therapist you are sending the email to.
- 3) Change the {DATE RANGE} to the appropriate fortnight and 6 week retention dates. This will likely already be done for you but its good to at least double check!
- 4) Open up Excel document, 'RF FORTNIGHT DATA TABLE'. it will look like this:

- 5) Refer to the line of data relevant to the therapist and clinic you need. For example: Lets look at Alex @ Greenslopes :)

THERAPIST NAME	RAVING FAN STATS (25/03 - 07/04)							APPT METRICS (25/03 - 07/04)							
	EP	EP Rebooked	%	NP	NP Rebooked	%	Total Clients	Total Rebooked	%	YTD AV	GOLD STAR	%	DAY OF BOOKING	%	TOTAL CLIENTS
Alex Le	47	16	34.04%	7	4	57.14%	54	20	37.04%	29.75%	29	53.70%	8	14.81%	54

RETENTION STATS (11/02 - 24/02) *6 weeks prior										
Therapist	EP	EP Rebooked	%	NP	NP Rebooked	%	Total Clients	Retained	%	YTD AV
Alex Le	46	20	43.48%	7	3	42.86%	53	23	43.40%	41.55%

The orange data in our excel spread sheet will go in the orange table of the email template. The purple data in the purple table, and the green data in the green table.

ORANGE DATA - RAVING FANS

RAVING FANS STATS	
Dates: {DATE RANGE}	
TOTAL EXISTING CLIENTS	
Total Clients:	
Total Rebooked:	
%:	
TOTAL NEW CLIENTS	
Total Clients:	
Total Rebooked:	
%:	
GRAND TOTAL CLIENTS	
Total Clients:	
Total Rebooked:	
%:	
YTD Average	

EP = Existing patients

EP Rebooked = Existing patients that have booked a follow up appointment

% = Percentage of patients rebooked of the total seen.

Total clients = Total clients seen

Total Rebooked = Total clients that have booked a follow up appointment

% = Percentage of total clients rebooked of the total seen

NP = New/Initial patients

NP Rebooked = New/Initial patients that have booked a follow up appointment

% = Percentage of new clients rebooked of the total seen.

YTD Average = Average percentage of their total rebooked stats for the year to date.

PURPLE DATA - APPOINTMENT METRICS

BOOKING/APPT STATS	
Total Gold Star Requests	
% of Total bookings	
Total Same Day Bookings	
% of Total bookings	

Total Gold star requests = total appointments with a gold star assigned. This means the client has requested that therapist.

% of Total bookings = Percentage of gold star patients of the total seen.

Total Same day bookings = total appointments booked on the same day of treatment. This number helps us reflect how often the therapist is booked out in advance.

% of Total bookings = Percentage of same day bookings of the total seen.

GREEN DATA - RETENTION STATS

STATS	
Dates: {6wk DATE RANGE}	
TOTAL EXISTING CLIENTS	
Total Clients:	
Total Returned:	
%:	
TOTAL NEW CLIENTS	
Total Clients:	
Total Returned:	
%:	
GRAND TOTAL CLIENTS	
Total Clients:	
Total Returned:	
%:	
YTD Average	

EP = Existing patients seen in the fortnight

EP Rebooked = Existing patients that returned within 42 days of their treatment

% = Percentage of patients returned of the original seen

Total clients = Total clients seen

Total Rebooked = Total clients that returned within 42 days of their treatment

% = Percentage of total clients returned of the original seen

NP = New/Initial patients seen in the fortnight

NP Rebooked = New/Initial patients that returned within 42 days of their treatment

% = Percentage of new clients returned of the original seen

YTD Average = Average percentage of their total 6wk returned stats for the year to date.

6) Make sure you address the email to the correct therapist's email address and make the email subject '**RAVING FAN EMAILS | {DATE} TO {DATE}**'. Your email should look something like this:

To... Alex.Lee
 Cc...
 Bcc...
 Subject: Raving Fan Email | 25.03.21 to 07.04.21

Send

Hi There ALEX,

We hope you are having a great week. So, below are your personal business stats for the fortnight 25th March to the 7th April.

A very big thank you for everything you have done for our clients and for what you have brought to the clinic in the past two weeks! Have a fab day!

Thanks,

RAVING FANS STATS		6 WEEKLY RETENTION STATS	
Dates: 25/03/21 – 07/04/21		Dates: 11/02/21 – 24/02/21	
TOTAL EXISTING CLIENTS		TOTAL EXISTING CLIENTS	
Total Clients:	47	Total Clients:	46
Total Rebooked:	16	Total Returned:	20
%:	34.04	%:	43.48
TOTAL NEW CLIENTS		TOTAL NEW CLIENTS	
Total Clients:	7	Total Clients:	7
Total Rebooked:	4	Total Returned:	3
%:	57.14	%:	42.86
GRAND TOTAL CLIENTS		GRAND TOTAL CLIENTS	
Total Clients:	54	Total Clients:	53
Total Rebooked:	20	Total Returned:	23
%:	37.04	%:	43.40
YTD Average	29.75	YTD Average	41.55

BOOKING/APPLY STATS	
Total Gold Star Requests	29
% of Total bookings	53.70
Total Same Day Bookings	8
% of Total bookings	14.81

□

YOUR RAVING FANS % CLIENT BREAKDOWN FOR THIS PAST FORTNIGHT:

GINIX	Number Attended:	54
	Number Rebooked:	20
	Rebooking Percentage:	37.04

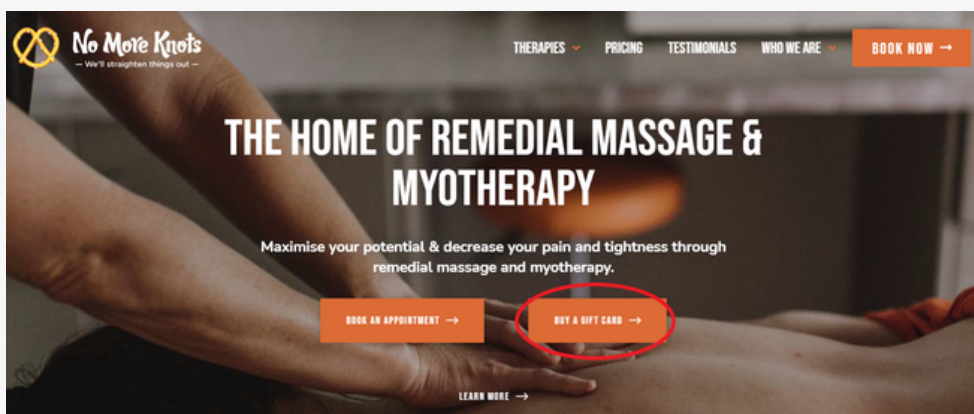
GIFT VOUCHERS

There are 2 ways a client can purchase a gift voucher; online or in person at any of our clinics. It is important to make sure that if reception is responsible for actioning the sale of a gift voucher that we accurately record the details of the sale in our registry and make sure that it is assigned to the relevant clients account. This way, if a gift voucher is ever lost, we are able to track it.

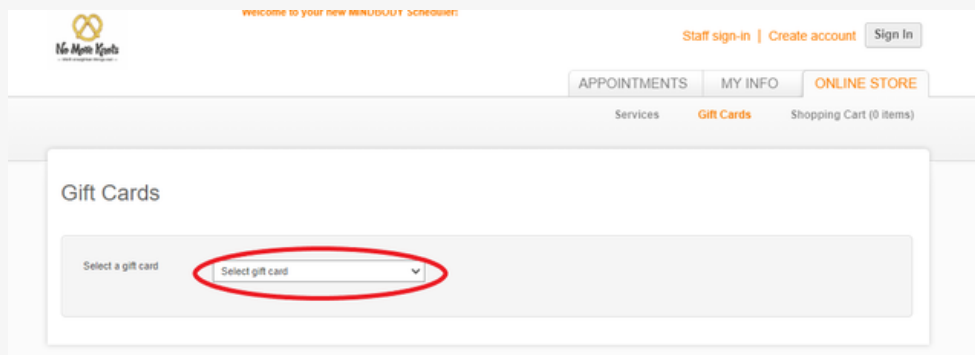
PURCHASING A GIFT VOUCHER ONLINE

This is the easiest version for a client to purchase a gift voucher. The client need only get to our website, select the option to purchase a gift voucher, and will be prompted through all the steps to log in, assign who it is for, customise the view of the voucher and amount, and process payment. The Voucher ID will be autogenerated by the system, and because of the process, there should be now way for the process to go wrong or the voucher go missing. Reception does not need to do anything in this process; however, the below steps will guide you through what they client should see if you ever need to provide any assistance.

1. On our home page there is a 'Buy a Gift Card' button. Click on this, and you will be taken to our Online Store.



2. The only items available in our Online Store are gift vouchers. There is a drop-down list where the type of voucher can be selected. We provide options for set 1hr treatments, or a custom amount.



3. Once the type of voucher has been selected, the client will need to enter the following information in. They will be unable to progree to the next screen until they do so.

- To
- From
- Send recipient the gift card via email *OPTIONAL*
- Title
- Personal Message
- Recipients full name
- Design of the voucher

Gift Cards

Select a gift card

To *

From *

Send recipient the gift card via email

Title *

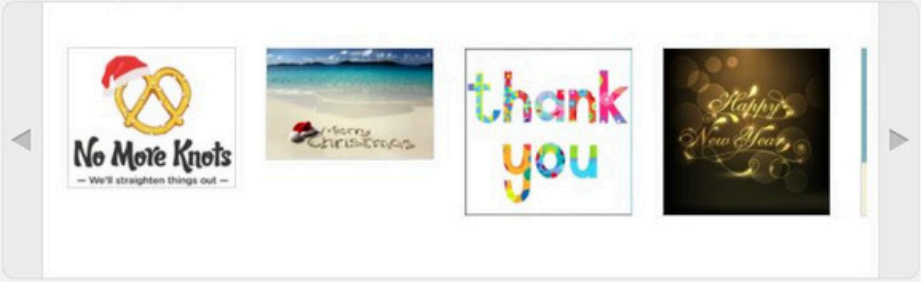
Personal message

Recipient's full name *

You will be able to print this gift card once your transaction is complete. You will also receive an email copy of the gift card so it can be printed at a later time.

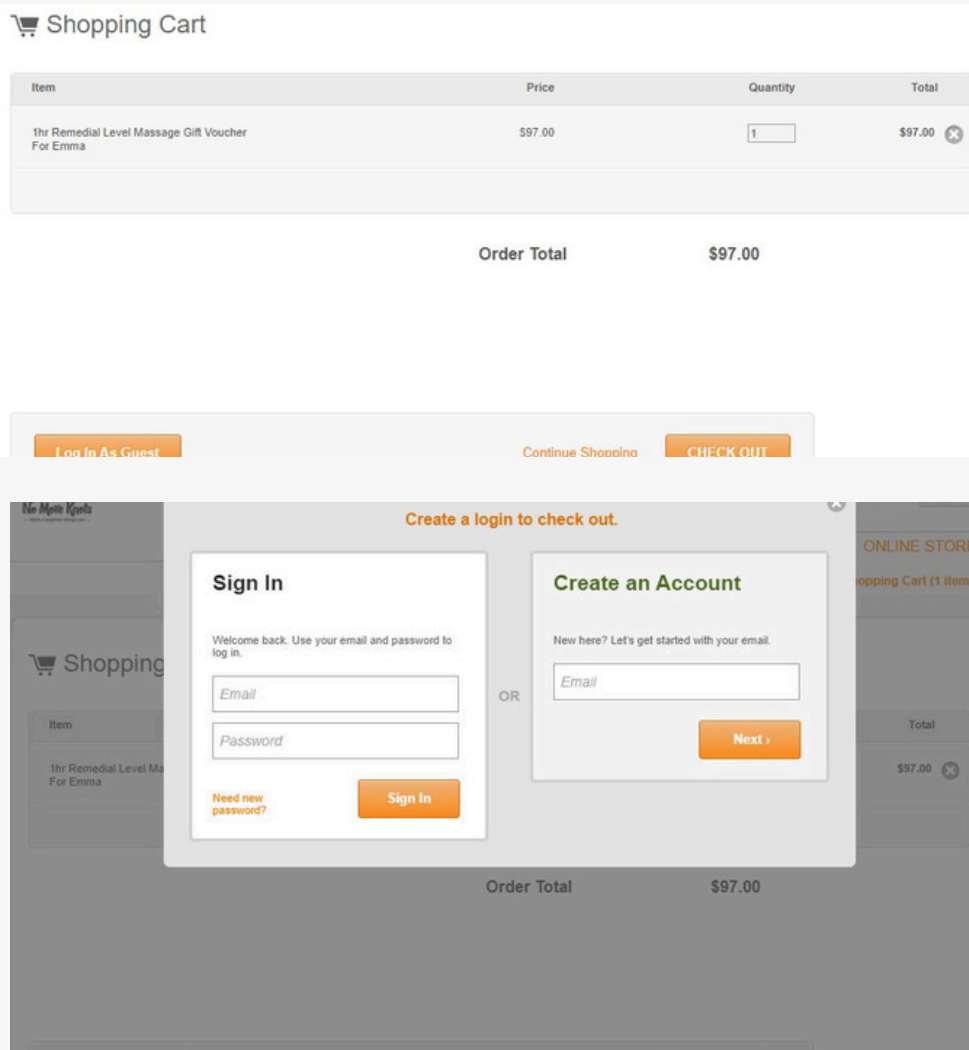
*Required field

Select an image below



4. After this has all been assigned, they can move on to make the purchase.

5. At checkout, the client will then be prompted to login to their account, or create one if they are not already an existing client. They can choose to login as a guest and the purchase will be assigned to 'Online Guest'. It is still trackable under this account, though it is preferable that the voucher is assigned to an active client.



6. Next, the client will be asked for payment details and an email for where to send the voucher to. They will also have an option to print a copy of the voucher straight away.

PURCHASING A GIFT VOUCHER IN-STORE

Buy purchasing a voucher directly instore, clients will receive one of our little plastic gift cards which each have their own unique code on the back.

When a client purchases a voucher in store we will need to:

- 1) assign the purchase to a profile in mind body - this may involve create a new client profile.
- 2) take payment for the gift voucher
- 3) record the sale and gift card details in our 'Gift Voucher Register'

By completing the above steps we aim to ensure that we can always trace the purchase of a voucher if need be, even if a client loses the voucher ID.

When a client is purchasing a gift voucher, the easiest point to start is to determine if the purchaser and the receiver have been to the clinic before. If they have it will save us the step of creating a profile as we will be able to find a pre-existing one in the system. Then determine how much they would like to spend on the voucher. If they are new to our clinic you may need to talk them through our prices, and recommendations for length of treatment.

It is preferable that the voucher be under the account of the purchaser as this makes more sense from a record/receipt point of view; however, if the purchaser does not wish this to be the case then it can go under the recipient's profile.

- 1) Collect the full name of both the purchaser and recipient. If a new profile needs to be created we will need to collect an appropriate mobile number as well. If their is a pre-existing client file in the system we can use this number to look up the file we want. Then jump into the retail screen.

- 2) Select a gift voucher from the reception draw. Using the 'Lookup' tool enter the code on the back of the card to confirm that the voucher is empty (*this should always be the case but it's always good to double check!*)

Once you have confirmed the gift card you are going to use we can move on to processing it.

Under the Payments/Gift Cards section, select the appropriate voucher type from the drop down list.

The screenshot displays the Mindbody software interface. At the top, there is a navigation bar with a search bar for clients, a user profile for Emma Murdoch, and a 'Sign Out' button. Below this is a 'Retail Point of Sale' section with a 'Which client is making a purchase?' dropdown menu. A 'LOOKUP' tool is highlighted with a red arrow, pointing to a search box labeled 'Gift card instance'. Below the search box is a list of items under the 'Payments/Gift Cards' category. The list includes various gift voucher types such as 'MIND GIFT VOUCHER (Custom Amount) at \$0.00', 'The Advanced Level Remedial Massage Gift Voucher at \$115.00', 'The Remedial Level Massage Gift Voucher at \$37.00', 'The Senior Level Remedial Massage Gift Voucher at \$105.00', 'Account Payment at \$0.00', 'ADVSMYIO 30min Gift Voucher at \$73.00', 'ADVSMYIO 45min Gift Voucher at \$97.00', 'ADVSMYIO 60min Gift Voucher at \$175.00', 'Client Credit at \$0.00', 'Pilates Group Mat Class Gift Card - 10 Class Pass at \$180.00', 'Pilates Group Mat Class Gift Card - 5 Class Pass at \$90.00', 'RMT 30min Gift Voucher at \$42.00', 'RMT 45min Gift Voucher at \$63.00', 'RMT 60min Gift Voucher at \$148.00', 'Shared Massage Frac. Gap Payment at \$0.00', 'SHRMFYIO 30min Gift Voucher at \$160.00', 'SHRMFYIO 45min Gift Voucher at \$68.00', 'SHRMFYIO 60min Gift Voucher at \$85.00', and 'Write Off (Managers Only) at \$0.00'. The 'TICKET' section on the left shows 'No Items Selected' and a 'SUBTOTAL' of \$0.00.

3) Enter the gift card ID from the back of the card. You will need to do this twice.

If a pre-set type of voucher is selected then the price and value will be automatically generated. If a custom voucher is selected, then you will need to enter this information in manually.

In the notes section, make sure to leave a note of the relevant purchase details.

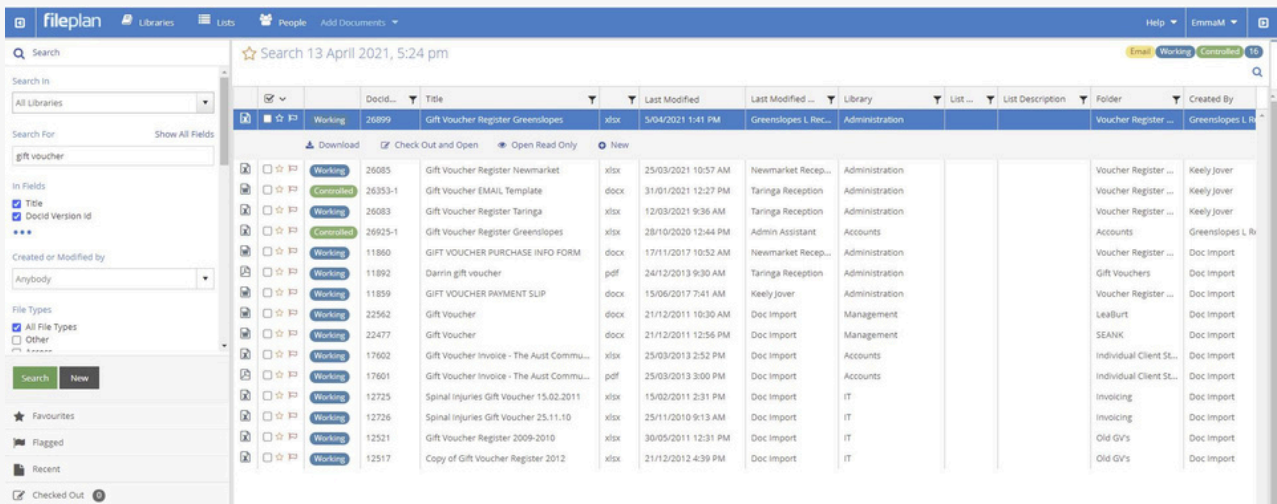
Add Item
Pay for another client

Products	Services	Packages	Payments/Gift Cards
Item Name: 1hr Remedial Level Massage Gift Voucher at \$97.00			
Gift Card ID	TEST1	TEST1	Current Balance: \$0.00
Price	97.00		
Value	97.00		
Discount	\$0.00	0.00	Amount
Purchased for Minnie Mouse - EM			
Total	\$97.00		Add Item

4) Add the item to the cart and select the appropriate payment option and save!

Once this process is complete the gift card is active and should have the relevant amount on it. Print off the receipt for the client if they wish and give them the card. The rest of the steps do not need to be actioned with the client present.

5) Open Fileplan, and search for the 'Gift Voucher Registry'. There is one for each clinic location and you will need to use the one that matches the location the voucher was sold at. Select the document and use 'Check out and Open'.



3) In the gift card register you will need to record the following information: *You can view the current example in the image below (highlighted in yellow).*

- Date (meaning date sold)
- Full name of purchaser
- Full name of recipient
- Gift card value
- Voucher ID:
- Your initials (that way we can trace who made the sale)
- Comments of the sale (this is where we include a note of which account it was processed under but could also include any other relevant information.

NMK GIFT VOUCHER REGISTER - Greenslopes						
2021						
DATE	PURCHASER	RECIPIENT	VALUE	VOUCHER #	AUTHORISED BY	COMMENTS
JANUARY						
9/01/2021	Gian Capati	Ash	\$100	0.001383	KT	Custom Amount: \$100 (purchased on Gians account kt)
21/01/2021	Michael Barry	Megan Barry	\$97	0.00088	KT	1 x 1hr RMT Massage (purchased on Megans account
25/01/2021	barbara Samway	Janet (Daughter)	\$115	0.001236	KT	1 x 1HR AVD Massage (purchased on Barbaras account)
31/01/2021	Anastasia Morton	Dad	\$70	0.001333	AC	Custom Amount: \$70 (purchased on Anastasia's account)
FEBRUARY						
10.2.21	Matt Parry	Annette Curry	\$115	GC10061	BL	1 x 1hr ADV Massage (prchased on Annette's account)
19/02/2021	Damian Carter	Andrea Carter	\$115	GC10052	KM	1 x 1hr ADV Massage (purchased on Andrea's account)
25/02/2021	Amy Kemp	Felicity Ouk	\$105	0.001237	KT	1 x 1hr SNR Massage (purchased on Amys Account)
27/02/2021	Frances Duff	Kelly Page	\$100	0.000196	KT	Custom Amount: \$100 (purchased on Frances Account)
MARCH						
4/03/2021	Michelle Buchta	Andrea Cave	\$105	0.000835	NL	1 x 1hr Snr Massage (purchased on Andrea's account)
6/04/2021	Hayley Simon	Lauren Tellez / White	\$175	GC10178	KT	1 x 90min ADV Massage (purchased on Laurens account)
10/03/2021	Walk-in (mother)	Michelle Skehan	\$100	#001223	AM	Custom amount: \$100 (purchased on Michelle's account)
10/03/2021	Walk-in (mother)	Rebecca Skehan	\$100	#000313	AM	Custom amount: \$100 (purchased on Rebecca's account)
11/03/2021	Walk-in (Amanda Hoyland)	Matt Carson	\$70	#000899	AC	Custom amount: \$70 (purchased through walk in as purchaser was not a client of ours)
18/03/2021	(phone call) Colleen Gamgee	Jane Gamgee	\$210	E000301	KT	Custom amount: \$210 (purchased through Jane Gamgee account)
29/03/2021	Darryl Rangiah	Not advised	\$97	GC10341	BL	1 x RMT massage (purchased on Darryl Rangiah account)
29/03/2021	Darryl Rangiah	Not advised	\$97	0.000001	BL	1 x RMT massage (purchased on Darryl Rangiah account)
APRIL						
5/04/2021	Darryl Rangiah	didn't get sorry recp really	\$97	#001231	Kt	1 x RMT massage (purchased on Darryl Rangiah account)
12/04/2021	Mickey Mouse	Minnie Mouse	\$97	TEST1	EM	1 x RMT massage (purchased on Mickey Mouse's account)

HICAPS & HEALTHFUNDS

WHAT IS HICAPS?

Formed in 1998, HICAPS is Australia's leading ancillary health claims billing solution for healthcare professionals. HICAPS provides an efficient and easy payment procession solution for health fund payment across Australia.

HICAPS can save time and money for healthcare providers and patients alike as claims are able to be made on the spot.



Fast claims... on the spot



WHAT IS A HEALTH FUND?

There are two types of private health insurance - hospital policies cover you when you go to hospital, while general treatment policies cover you for ancillary treatment (e.g. dental, physiotherapy & remedial massage). This is often referred to as EXTRA's coverage.

If a client has purchased health insurance for the first time or is upgrading their plan, they need to serve a waiting period before they can claim benefits. During the waiting period, they won't receive any benefits for certain treatments or they can receive lower benefits for a period of time.

Generally the health fund will provide a rebate of either a fixed amount or a percentage of the treatment cost. The rebate will depend on the health fund a client is with, as well as the level of cover they have within the fund.

Remedial Massage Therapists are issued individual provider numbers for each health fund. This provider number ensures that claims may be processed manually with the health fund, and we record these for all of our therapists in a spreadsheet saved on Fileplan. You will need to refer to this regularly when retailing client payments.

WHAT IS A MESSAGE ASSOCIATION?

A Massage Association is a community of Therapists, and as part of an association, therapists gain the protection of a respected and recognised voice for the industry. Associations are designed to help regulate the industry and keep professionals to a high industry standard.

To be eligible for provider numbers for the various health funds therapists must be a member of an association. They must also have Professional Indemnity Insurance, First Aid Certificate and keep Continuing Professional Education (CPE) points up to date. The associations keep track of all this information and notify the health funds if a therapist does not meet the criteria at any time.

In order to process a rebate for a client on their remedial or myotherapy service, the provider (the therapist) needs to have an active provider number for the address the service was at. The process looks something like this:

The therapist registers the clinic address they are working at with their association. The association approves the new clinic address and sends off this information as part of their monthly update to the health funds. When and how often an association will process this paperwork is dependent on the individual association.

The health funds will process the paper work received by the association each month. Once processed, the provider will have an active registration status with the fund, and will receive a health fund specific provider number. When and how often a health fund will process this paperwork is dependent on the individual fund.

In order to get set up on the HICAPS terminal, we need to fill out an application through HICAPS online. You will need to wait until we receive a copy of the therapist's MEDIBANK PROVIDER LETTER in order to do this. Once you have completed the online form, it will typically take 48 - 72hrs for the funds to update and link to the HICAPS account.

The process of getting a therapist registered with all health funds and onto our HICAPS terminal can take anywhere from 4 - 6 weeks!

COLLECTING PROVIDER NUMBERS

When a new therapist starts we should already have a copy of the following documents:

- Their qualification
- Their Association Membership Letter
- Their PII Insurance
- Their FIRST AID & CPR

A new therapist should/and will often register the clinic address with their association around the time of their initial position offer with the Manager. Our team will encourage new therapists to do this ASAP as the entire health fund registration process can take a couple weeks.

If a therapist does this but does not officially begin treating for a while, then it is possible to complete the administrative process of collecting their health fund numbers and confirming registration all before they start. This would have minimal client impact.

It is likely though, that most new therapists will start before we have all their numbers confirmed. You will need to ensure that clients who book with this therapist are made aware that we don't currently have an active provider number for them yet, so they will be unable to claim.

NEVER PROMISE A CLIENT A BACKDATED CLAIM UNDER ANY CIRCUMSTANCES. -> A client's ability to receive a rebate is down to the provider information + client's plan + the individual fund's terms and policies. We do not have influence over these factors and so should never make an assumption.

In the case of a new provider a fund will NEVER backdate a claim as this provider has not existed with them at this address before.

WAIT MIN. 2 WEEKS BEFORE YOU START TO CALL FUNDS.

If a therapist has been offered a contract with us on Monday, and starts work that week, their paperwork as likely not been processed even at the first level yet (i.e ASSOCIATION TO HEALTH FUNDS) and so calling will likely result in the funds stating that the provider doesn't exist, or have record at the address.

It is important to know that some associations are able to provide their members with details on what their provider number with a particular health fund will be in advance of them actually being registered with that fund. This is largely due to the fact that for some health funds, the provider number is related to the providers association member number. This means, that just because a therapist may be able to tell you what their provider number is, doesn't mean that they are actively registered with that fund.

Unless the documentation received is an approved letter confirming registration with the health fund, do not assume that it is the correct or active number. In the interest of the business and our clients, please always call the health funds directly to confirm.

CALLING HEALTH FUNDS

In the interest of avoiding confusion when dealing with Health Funds, there is certain language and scripting that is useful to know:

PROVIDER: The practitioner / therapist

ASSOCIATION NUMBER: This is the therapists member number with their association . It is usually a combination of letters (for the association) and then a 4-5 digit number

PROVIDER NUMBER: This typically refers to the number linked to that fund. This number is the information that is required on a client's receipt, along with the therapist's name and other service details, in order to put through a claim manually with their fund.

ITEM NO. : This is the code that references the specific service modality (for example, remedial massage) when putting through a claim.

ADDRESS: This will be the service or clinic address. A provider must be registered for health fund status at each individual address that they work at. A therapist who is only registered at Newmarket will not have active provider numbers to provide a claimable service at Greenslopes. Therapists can work at as many locations as they like, but only three will be accepted for Health Fund status.

Scripting Suggestion:

"Hi, my name is _ and i'm calling on behalf of No More Knots. We are a remedial massage clinic in Brisbane, and I would like to check on the registration status of one of our providers. They started with us a couple weeks ago. Could you have a look at this for me?"

You should be ready to provide any of the following information:

- Full name of the therapist
- Clinic Address
- Association Number
- Medibank Number (some funds can use this to identify a provider)

If you are asked at this stage for a **PROVIDER NUMBER**, say:

"They are new to our clinic so I am not sure of their <NAME OF HEALTH FUND> specific provider number. This is something I would like to confirm with you if we can. I can provide you any other information."

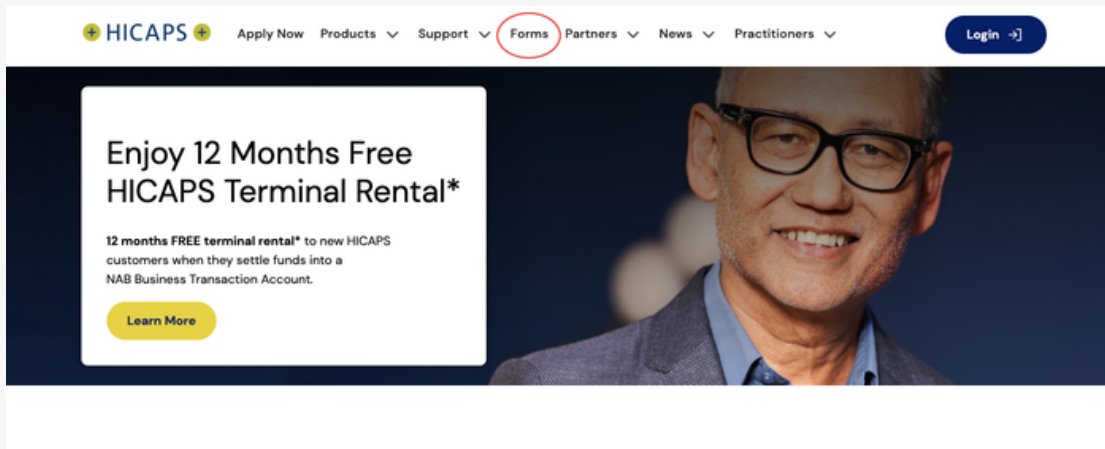
If you have used something along the lines of the initial intro script above, they are unlikely to ask you this

If they find the provider in their system, they will be able to confirm the therapist has an active registration with the fund for that address. This means clients can claim a rebate on their treatment. (MANUALLY ONLY UNTIL THE THERAPIST IS ACTUALLY SET UP ON THE HICAPS MACHINE)

If they cannot find the provider in the system, don't panic! It just means the fund has not updated their system with the latest information from the associations. Simply acknowledge this and aim to call back in another couple of days.

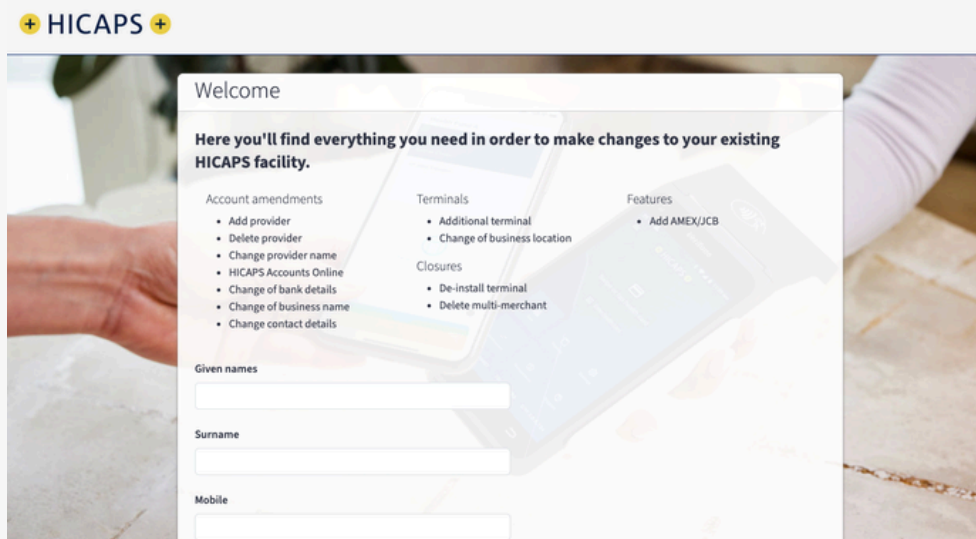
HICAPS ONLINE

If you need to make any adjustments to the terminals, you will need to go HICAPS.COM.AU



GO TO FORMS (Along the top navigation) - and then select the ADD NEW PROVIDER OPTION.

Complete the required form as prompted. The most common ones you will use will be ADD A NEW PROVIDER and DELETE A PROVIDER.



At any stage in the process you can call the HICAPS help line and they can guide you through it.

To complete any form you will require some or all of the following information. Check in with a manager for help if you are unsure:

- Contact information for the form request
- Details on the provider
- Details on the terminal & merchant ID's
- Details on the registered business
- You may also require copies of certificates and provider letters from the therapist you are adding.

WHAT HAPPENS WHEN A THERAPIST FALLS OFF THE HEALTH FUND LIST?

When a therapist “falls off” the health fund list, it means that they are considered de-active with the health fund and rebate claims cannot be processed. For a therapist that is actively treating with us, this usually happens because they have not met the requirements of their association. Each individual association has their own requirements for their members but the main causes for this usually are because the therapist:

- Has not paid their membership premium
- Has not supplied record of current PI Insurance
- Has not supplied record of the CPE requirement
- Has not supplied record of current FIRST AID / CPR Certification

When a therapist does not fulfil their membership requirements they are not included on the monthly paper work that the association sends to the funds. If the funds do not see the provider on the active list, they will de-activate the provider.

WE TYPICALLY BECOME AWARE OF THIS BECAUSE AN OTS CLAIM GETS REJECTED WITH AN ERROR CODE ALONG THE LINES OF “PROVIDER NOT RECOGNISED” OR “PROVIDER NOT VALID”

IF THIS ERROR OCCURS...Do not assume our provider is at fault until we know for certain.

You should take payment in full for the treatment.

“Our terminal is rejecting the OTS claim with our provider. We aren’t aware of any issues at the current time. We will need to take payment in full from you today and provide receipts for you to attempt a manual claim.”

Although not common, it is possible for the HICAPS system to experience errors where it is unable to connect and recognise the HICAPS provider number of our therapist. This will result in the same errors as HICAPS is unable to recognise that there is an active provider. You will not be able to confirm whether this is an issue until you call HICAPS or the HEALTH FUND directly for them to investigate on their system.

Always assure the client that you will follow up with things on our end to investigate any issues. If they have any problems submitting their manual claim they should also be encouraged to let us know as soon as possible.

STEPS TO FOLLOW:

1. **Error occurs on terminal [PROVIDER NOT RECOGNISED]** --> Organise with the client to make payment in full for the treatment and issue them with receipts to make a manual claim. Assure them that you will investigate things on our end to check there is no issue with the provider and you will be in contact with them again when you know more.
2. **Call HICAPS** --> Often when calling a HEALTH FUND about an issue with digital claiming, their first response will be to ask if you have called HICAPS. In case it is a HICAPS system issue too, it is best to start here. If they confirm that it is a system issue on their end you do not need to proceed with the next steps and can go directly back to the client and confirm that they should have no issue processing a manual claim.
3. **Call the HEALTH FUND** --> If HICAPS is unclear or suggests it is a specific health fund / provider issue, call the HEALTH FUND directly. If they confirm that it is a system issue on their end you do not need to proceed with the next steps and can go directly back to the client and confirm that they should have no issue processing a manual claim. If they confirm that the provider is no longer active because they didn't meet certain requirements then you will need to continue with the following steps.
4. **Advise the manager of the issue** --> If one health fund has dropped it is only a matter of time before the provider loses their status with all funds. The only reason that they might be active with one while others are not comes down to when the fund updates their systems with the paperwork it receives from the association each month. Just like how the funds are registered in a staggered order, they will drop off in a staggered order. We will not know when this occurs so it is just best to assume that they are known not active with any fund.
5. **Advise the therapist of the issue ASAP** --> They will need to get in contact with their association to discuss and rectify their registration issue ASAP.
6. **Contact the client** --> Discuss the appropriate course of action first with a manager, but we will then need to contact the initial client back to advise them that it was an issue with the provider and they will be unable to make a claim. Be prepared to discuss some form of compensation.
7. **Make clear notes on the diary & running email** --> ensure the team is prepared as we are going to have to manage their diary for the next couple of weeks.

If a provider has lost their registration status with their health funds, we will need to diligently manage their diary to ensure that all clients booked in are made aware that they cannot claim. This process may involve:

- removal from online bookings
- notes on the diary & running email
- text notifications to their clients

Some clients have plans with their health funds that cover a significant portion of their treatment so you should be prepared for clients to want to reschedule/cancel if they are aware they cannot claim.

You are welcome to provide manual receipts for claiming if the client would like to try receive a rebate directly but you must be clear that we are not guaranteeing that it will go through and the client must be prepared to cover the full cost of the treatment regardless.

If a therapist is able to correct the issue with their association quickly, it is possible for some funds to accept backdated claims under these circumstances HOWEVER we do not have control over this so it should not be assumed.

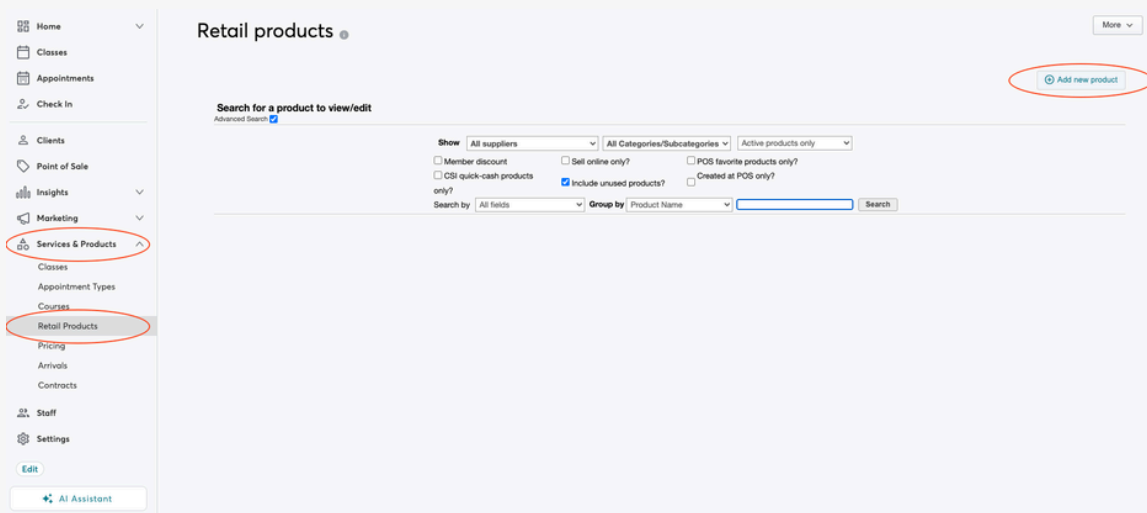
RETAIL PRODUCTS

We keep track of all our inventory of all retail products within MINDBODY. You will need to make sure that you manage our products correctly within the system to ensure that we can then track sales correctly too.

CREATING A NEW PRODUCT

Introducing a new retail product? We will need to add it to the system. This also goes for items that may only be purchased by team members & staff that we would like to keep track of on their client profile, such as a Team Shirt.

GO TO MINDBODY --> SERVICES & PRODUCTS --> RETAIL PRODUCTS --> ADD NEW PRODUCT



COMPLETE EACH OF THE FOLLOWING SECTIONS: BASIC INFORMATION, INVENTORY, MEMBERSHIP SETTINGS & DISCOUNTS.

Add a New Product

- > Basic Information
- > Sell Online
- > Color & Size
- > Inventory
- > Membership Settings & Discounts
- > Additional Information

Cancel Add Save & Add Next

BASIC INFORMATION

PRODUCT NAME: Name the Product. This is the item name that it will be listed under.

PRODUCT PRICE: Total retail cost of the product to purchase. Make sure GST is ticked (if applicable).

WHOLESALE COST: Cost of the item for the business to purchase. When we purchase the item in bulk (such as, trigger balls & pocket physios) try to work out the cost of the item individually.

SOLD AT LOCATIONS: You can adjust this to singular locations if it is unique to a specific clinic.

CATEGORY: Select an appropriate category from the list of drop down options for the product to fall under. If there is not a suitable option you can leave it unassigned and a new category can be created later.

Add a New Product

Basic Information

Product name

Product price

GST
[Tax Analysis](#)

Wholesale cost

Barcode

Sold at locations

Category

[+ Add a subcategory](#)

*Required fields

INVENTORY

NUMBER IN STOCK: Enter in how much stock we have available of each item on hand at the clinic. If you are creating the item before we have ordered any, just leave this as zero for now.

PRODUCT PRICE: Select the supplier/company that we purchased the product through from the list of drop down options. If there is not a suitable option you can leave it unassigned and a new supplier can be created later.

Inventory

Number in stock

Greenslopes

Taringa

Newmarket

Barcode label text

Line 1: Product Name [Edit](#)

Line 2: Color/Size [Edit](#)

Manufacturer ID

Supplier

MEMBERSHIP SETTINGS

You have the option to **restrict purchases to certain memberships**. Any item that is restricted to a particular membership will mean that the item will not display within the retail screen options unless the client is a member of the restricted group. This is typically not necessary; however, it may be suitable in the creation of Team Only products such as uniform items like the Team Shirt.

MEMBER DISCOUNTS APPLY: Some memberships have an agreed product discount as well as a service discount (such as NMK Ambassador, and NMK Team). Unless the item is a restricted item which we have decided does not allow for any discounts to apply, select YES, and just tick ALL MEMBERSHIPS from the drop down list. You do not need to worry about individually selecting each group as only the memberships that have a product discount built into their settings will generate a discount at the retail screen.

▼ **Membership Settings & Discounts**

Restrict who can purchase this product? Yes, restrict purchases to certain memberships No

Do any member discounts apply to this product? Yes, certain members receive a discount No

DISCONTINUING A PRODUCT

Finally sold out of a product we no longer want to stock? Discontinue it from our product list! This will remove it from our active search and search options in the retail screen.

GO TO MINDBODY --> SERVICES & PRODUCTS --> RETAIL PRODUCTS --> find the product you are after

Show: All suppliers | All Categories/Subcategories | Active products only

Member discount | Sell online only? | POS favorite products only?

CSI quick-cash products | Include unused products? | Created at POS only?

only?

Search by: All fields | Group by: Product Name |

Discontinued		Matching Products										
Check All	Uncheck All	Product Name	Variants	Retail Price	Online Price	Our Cost	Shipping Weight	Sold Online	Favorite Product	Created By	Creation Date	Modification Date
<input type="checkbox"/>	<input type="checkbox"/>	250ml Magnesium Oil	1	20.00	0.00	13.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	3/08/2020	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Booby Band "DISCONTINUED"	3	20.00	0.00	17.60	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	5/06/2021	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Castor Oil 200ml	1	26.95	26.95	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	20/09/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Collagen Beauty Boost 210g	1	69.95	69.95	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	20/09/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Complete Joint Care 200g	1	69.95	69.95	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	20/09/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Creatine Monohydrate 300g	1	43.95	43.95	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	20/09/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Epsom Salts	1	8.00	0.00	0.00	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sarah	27/02/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Epsom Salts MINI	1	4.00	40.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	21/05/2020	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	FlexEze Heat Patch	1	2.50	2.50	1.65	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	1/09/2022	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	LARGE Heat Patch	1	55.00	0.00	35.20	0.05	<input type="checkbox"/>	<input type="checkbox"/>	Meaghan	2/08/2022	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Mega 8 210g	1	53.15	53.15	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	20/09/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	NMK Contractor Shirt	1	35.00	35.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Keely	15/06/2016	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	NMK Reception Shirt	1	35.00	0.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Sarah	5/11/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Physio Roller (Long 90cm)	1	50.00	0.00	40.15	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sarah	1/03/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Physio Roller (Medium 45cm)	1	35.00	0.00	28.05	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sarah	27/02/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Physio Roller (Short 30cm)	1	25.00	0.00	19.80	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sarah	27/02/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Pocket Physio	1	8.00	0.00	5.23	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sarah	1/03/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Posture Medic Original "DISCONTINUED"	4	50.00	50.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	28/06/2020	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Posture Pro	1	35.00	35.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	2/03/2020	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Rocktape/K Tape	1	19.00	0.00	14.85	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sarah	27/02/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	SMALL Heat Patch	1	37.00	37.00	20.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	3/08/2022	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Smooth Trigger Ball	1	10.00	10.00	6.60	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	24/06/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Spikey Trigger Ball	1	10.00	10.00	6.60	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Emma (RMT)	24/06/2024	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Stretch Strap "DISCONTINUED"	3	20.00	0.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Sarah	27/02/2013	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Theracane	1	59.00	59.00	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Keely	16/09/2015	1/01/2025
<input type="checkbox"/>	<input type="checkbox"/>	Wonder Foods Epsom Salts	1	16.40	16.40	0.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>	Ellie	29/10/2024	1/01/2025

When you are ready to discontinue an item, simply select the tick box on the appropriate line on 'DISCONTINUED' column. Hit SAVE down the bottom. The item will be archived.

You can also use this screen to easily make adjustments to the following items without going into the individual settings for each product:

RETAIL PRICE: Purchase price

ONLINE PRICE *Not Currently Applicable*: If we sold items online, what would it cost the customer to purchase? You might make this more than the standard retail cost to take into account labour for packing, and shipping fees.

OUR COST: Wholesale cost

SHIPPING WEIGHT: *Not Currently Applicable*:

SELECT FOR IF A PRODUCT IS AVAILABLE ONLINE OR NOT *Not Currently Applicable*: Make sure this is NOT ticked.

CREATE A NEW SUPPLIER

changing supplier or introducing a new one? Create the option to assign to each product

GO TO MINDBODY --> SERVICES & PRODUCTS --> RETAIL PRODUCTS --> MORE --> SUPPLIERS

Retail products

Search for a product to view/edit
Advanced Search

Show All suppliers All Categories/Subcategories Active products only

Member discount Sell online only? POS favorite products only?
 CSI quick-cash products only? Include unused products? Created at POS only?

Search by All fields Group by Product Name Search

More

- Product Sizes
- Product Colors
- Suppliers
- Payment Terms
- Packages
- Revenue Categories
- Revenue Subcategories
- Product Revenue Categories

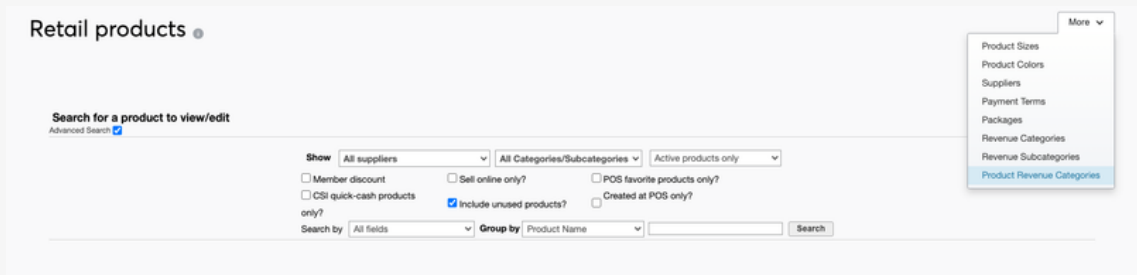
Choose the option to ADD NEW if you need to create a new one.

You can also select our current options from the drop down list and make any edits. There is also an option to archive suppliers no longer in use by de-selecting the ACTIVE button.

CREATE A NEW REVENUE CATEGORY

New item not fitting in to any of our current revenue categories? Create the option to assign to each product.

GO TO MINDBODY --> SERVICES & PRODUCTS --> RETAIL PRODUCTS --> MORE --> PRODUCT REVENUE CATEGORIES



Choose the option at the top to ADD NEW if you need to create a new one.

There is not an option to DELETE, so you can also choose to rename and use one of the old inactive slots that were made prior to us fully utilising this system. Simply rename the option, and tick the box to ACTIVATE it.

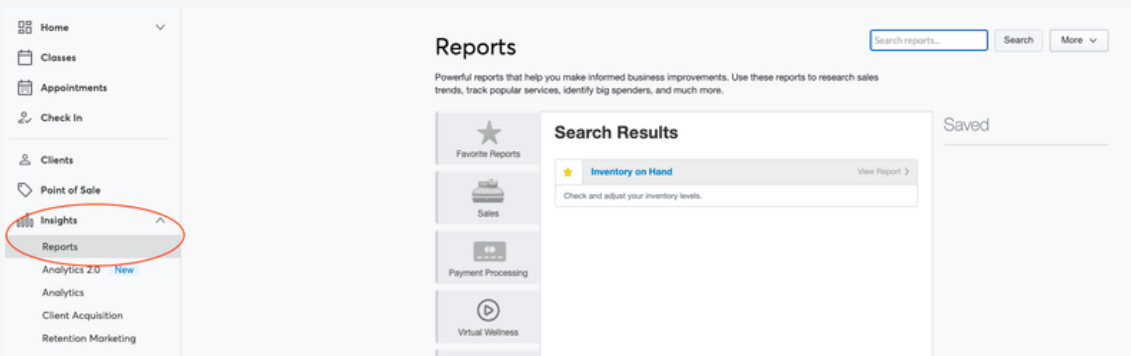
Product Revenue Categories

Add a New Product Category	
	Add
Category Name	Active?
1. Health & Supplements	<input checked="" type="checkbox"/>
2. Hot & Cold Therapy	<input checked="" type="checkbox"/>
3. Massage Products & Tools	<input checked="" type="checkbox"/>
4. NMR Team Uniform	<input checked="" type="checkbox"/>
5. Tape & Supports	<input checked="" type="checkbox"/>
6. Training & Rehab Tools	<input checked="" type="checkbox"/>
7. *NEW OPTION 1*	<input type="checkbox"/>
8. *NEW OPTION 2*	<input type="checkbox"/>
9. *NEW OPTION 3*	<input type="checkbox"/>
10. *NEW OPTION 4*	<input type="checkbox"/>
11. *NEW OPTION 5*	<input type="checkbox"/>
12. *NEW OPTION 6*	<input type="checkbox"/>
13. *NEW OPTION 7*	<input type="checkbox"/>
14. *NEW OPTION 8*	<input type="checkbox"/>

STOCKTAKE

We should regularly be performing a stocktake of all clinic items to ensure that we do not run out of any supplies. When you complete the stocktake of retail items, you will want to ensure that the quantity in clinic matches what we have reported in MINDBODY.

GO TO MINDBODY --> INSIGHTS --> REPORTS --> INVENTORY ON HAND



Generate a list of all the retail items that are applicable to the clinic.

Location: Choose which clinic you are performing the stocktake at

Supplier: All suppliers.

Revenue Category: Leave unselected or select ALL CATEGORIES

Date: Keep as the current date to see current stock levels.

Sort by: Product Name

TICK BOXES: Ensure 'Include Unused Products' and 'Include Oversold Products' are ticked. This will make sure that no items are left off the list.

Hit GENERATE.

If you find that the number in the ON HAND column does not match, simply update the number manually and hit UPDATE INVENTORY to save.

Be mindful of numbers that might indicate missing stock and check in with your clinic manager. If we have more stock on hand than what is reported than we may have missed logging in the latest order of inventory.

Reports » Inventory on Hand

Location: All Locations, Online Store, Greenslopes, Newmarket
 Supplier: All Suppliers
 Revenue Category: All Categories, Not Assigned, NEW OPTION 1, NEW OPTION 2, NEW OPTION 3
 Date: 3/11/2025
 Sort By: Product Name

Only Show Products Needing Reorder
 Include Discontinued Products
 Use Paging
 Include Unused Products
 Include Oversold Products
 Only Show In Stock or Oversold Products

Generate

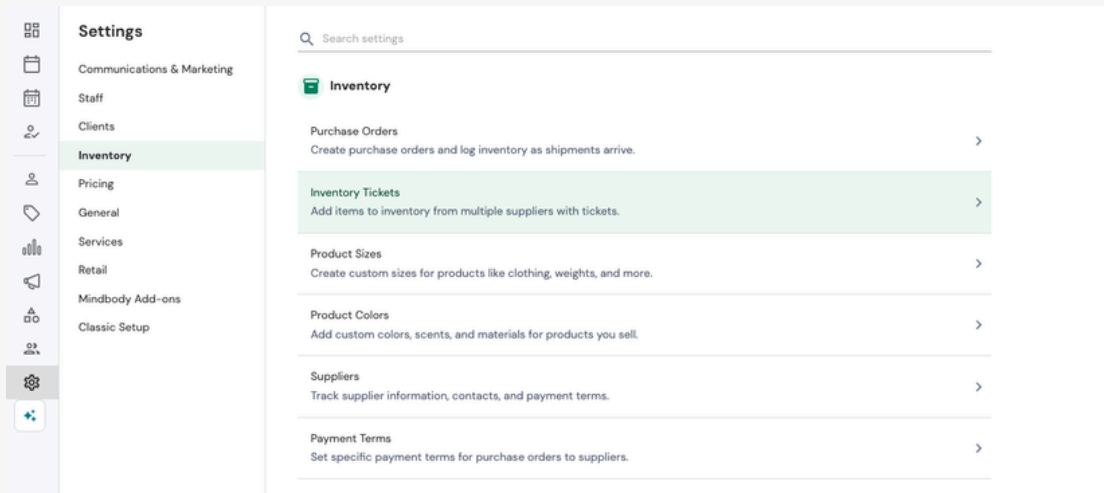
Update Type: Change On Hand Value | Update Inventory

Barcode	Product Name	Manufacturer ID	Supplier	Color	Size	Location	In Stock	Online Pending Orders	Change On Hand	Our Cost	Retail Price	Reorder Level	Max Level
1. 7885068228	250ml Magnesium Oil		Nuuvve Essentials	None	None	Greenslopes	0	0	0	\$13.00	\$20.00	0	0
2. 3114627268	Booby Band DISCONTINUED		Victor Sports Med	Black	None	Greenslopes	1	0	1	\$17.60	\$20.00	0	0
3. 9106923132	Booby Band DISCONTINUED		Victor Sports Med	Grey	None	Greenslopes	0	0	0	\$17.60	\$20.00	0	0
4. 4087735360	Booby Band DISCONTINUED		Victor Sports Med	Red	None	Greenslopes	0	0	0	\$17.60	\$20.00	0	0
5. 6142240307	Castor Oil 300ml		WONDER FOODS BY PROPEL	None	None	Greenslopes	2	0	2	\$0.00	\$26.95	0	0
6. 6129853046	Collagen Beauty Boost 210g		WONDER FOODS BY PROPEL	None	None	Greenslopes	3	0	3	\$0.00	\$69.95	0	0
7. 3927193014	Complete Joint Care 200g		WONDER FOODS BY PROPEL	None	None	Greenslopes	3	0	3	\$0.00	\$69.95	0	0
8. 1434556756	Creatine Monohydrate 300g		WONDER FOODS BY PROPEL	None	None	Greenslopes	0	0	0	\$0.00	\$43.95	0	0
9. 5888021994	Essom Salts		Nuuvve Essentials	None	None	Greenslopes	0	0	0	\$0.00	\$8.00	0	0

LOGGING NEW INVENTORY

To update our stock levels due to a new order / shipment of inventory we need to create an Inventory Ticket. This will help us create a record of our orders.

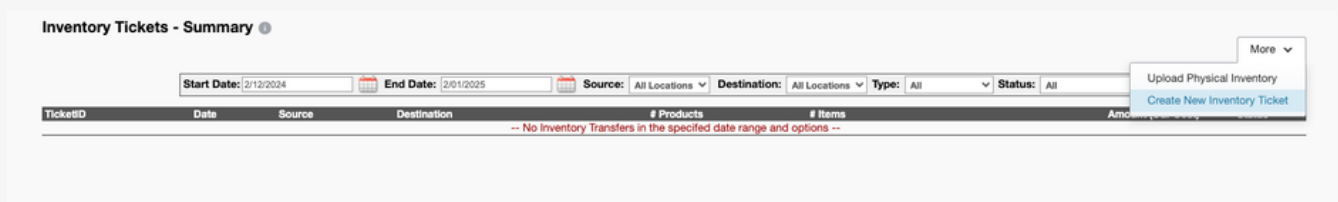
GO TO MINDBODY --> SETTINGS --> INVENTORY --> INVENTORY TICKETS



We can view all past and current Tickets on the Summary Page.

To create a new ticket:

GO TO MORE --> CREATE NEW INVENTORY TICKET



Click to select the type of ticket: Inventory Transfer or Incoming Inventory.

Inventory Transfer: We are moving logged inventory from one clinic to another

Incoming Inventory: We are logging an order & shipment of inventory from a supplier.

Choose a Date and the Location that is receiving the products. Click Next.

Look up the first item and click it to add it to the inventory ticket.

To view the inventory on hand value, check Show On Hand Totals.

Type in the quantity ordered. The inventory ticket automatically updates to reflect this quantity.

Do not click Log Inventory until the shipment arrives.

Since the inventory is automatically saved with each change, you can navigate away from the screen and come back through Settings > Inventory Tickets to reopen the pending inventory ticket.

WEEKEND SURCHARGE

As of the 1st Jan 2023 we introduced a surcharge for all weekend and public holiday appointments. The surcharge is a flat amount of \$5.50 which will be applied to the standard price of each appointment, regardless of length. The contractors will receive \$5 of this surcharge as an added rate for providing services to clients on these days, with the remaining 50c being required as GST.

SCRIPTING AROUND THE SURCHARGE

If a client ask's why we have a surcharge:

"The added surcharge is 100% for our therapist team so we can continue to maintain our availability throughout the week and offer appointments on the weekend and public holidays."

New Clients

After you have gone through the usual questions for reason for visit, health fund, etc.

"We are open on weekends if that will be the best day for you to attend. We do have an additional surcharge for our weekend and public holiday appointments to support our therapist team who work those days."

Existing clients

As the surcharge was introduced in 2023 we do expect our existing clients to be aware of the surcharge, however, there may be times where a week day regular client is booking in on the weekend for the first time.

Go through the usual questions of are they after a particular therapist? Reason for visit ect.

"THERAPIST NAME has some availability on WEEKEND DAY/PUBLIC HOLIDAY. Just in case you are not already aware, there be an additional surcharge for our weekend and public holiday appointments to support our therapist team who work those days."

ADDING THE SURCHARGE TO APPOINTMENTS

As part of our daily checks for the week ahead and when doing morning checks on a Saturday/ public holiday it is very important that all appointments have the weekend surcharge added. This allows the risk of charging a client the incorrect price. It is also important for the weekend public holiday surcharge to be added to the appointment for reports and therapist pays.

To add the weekend/ public holiday surcharge:

Step 1: Open the clients appointment that you wish to add the surcharge too, then click on the + Add button in the Add-ons section

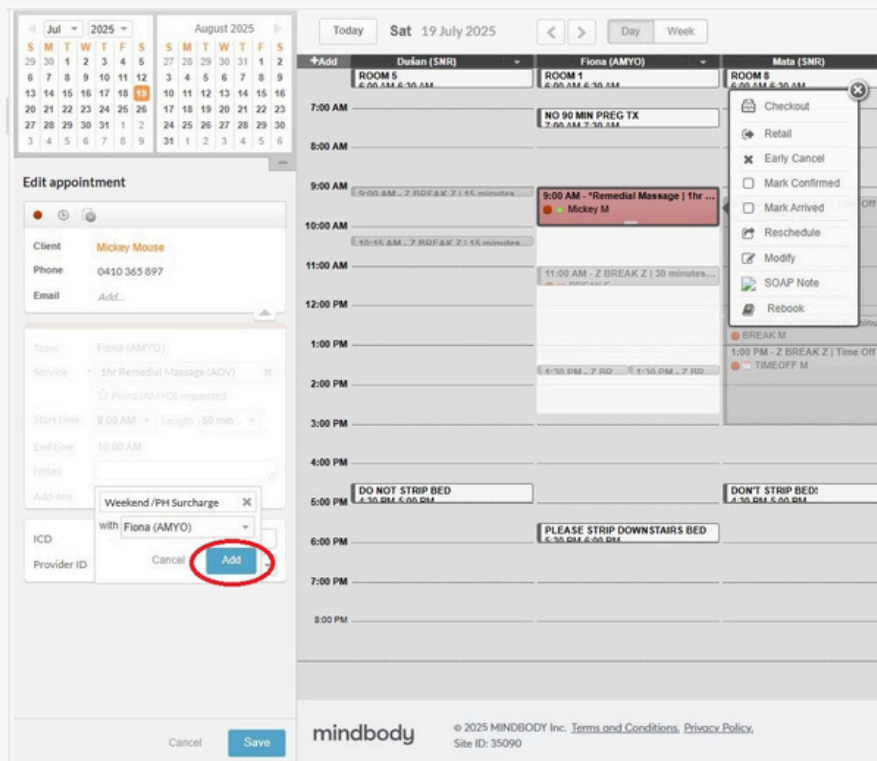
The screenshot displays a scheduling software interface for Saturday, 19 July 2025. On the left, a calendar shows the current date. The main area is divided into three columns for different rooms: ROOM 5 (Dušan (SNR)), ROOM 1 (Fiona (AMYO)), and ROOM 8 (Mata (SNR)). The time slots range from 7:00 AM to 8:00 PM. A specific appointment is highlighted in red at 9:00 AM in ROOM 1, titled "9:00 AM - Remedial Massage | 1hr ... Mickey M". To the right of the appointment grid, a context menu is open, listing actions such as "Checkout", "Retail", "Early Cancel", "Mark Confirmed", "Mark Arrived", "Reschedule", "Modify", "SOAP Note", and "Rebook". On the left side, the "Edit appointment" panel is visible, showing client details for "Mickey Mouse" and appointment specifics: "1hr Remedial Massage (ADV)", "Fiona (AMYO) requested", "Start time: 9:00 AM", "Length: 60 min", and "End time: 10:00 AM". The "Add-ons" section at the bottom of the edit panel has a red circle around the "+ Add" button. The footer of the interface includes the copyright notice "© 2025 MINDRODY Inc. Terms and Conditions Privacy Policy".

Step 2: Click in the 'search for a service' box and select weekend/ PH surcharge.

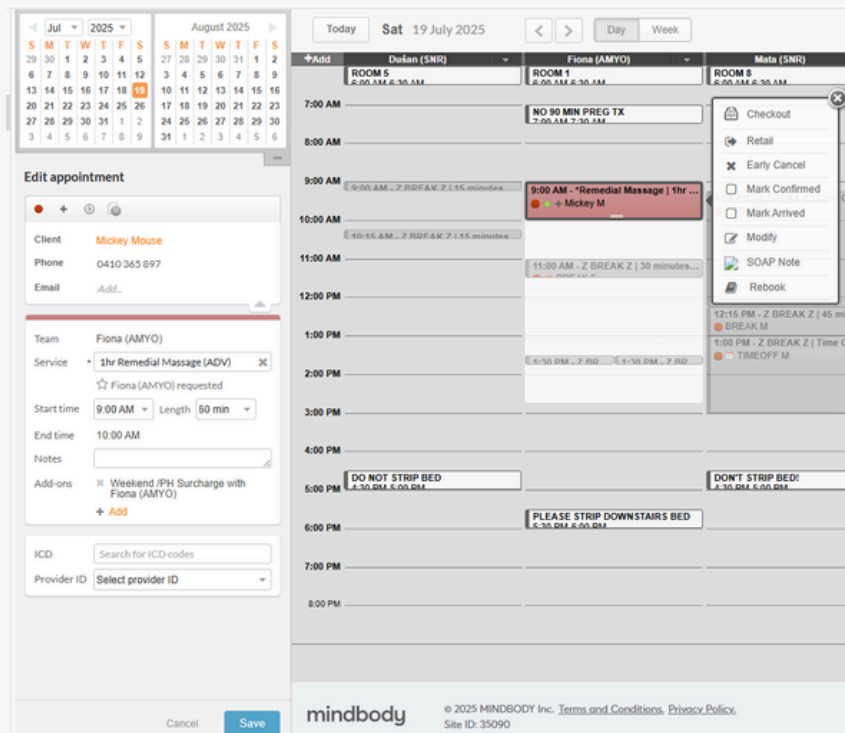
The screenshot shows the Mindbody software interface for editing an appointment on Saturday, July 19, 2025. The appointment is for Mickey Mouse, a 1hr Remedial Massage (ADV) service by Fiona (AMYO) from 9:00 AM to 10:00 AM. The 'Add-ons' section contains a search box labeled 'Search for a service' which is circled in red. A dropdown menu is open on the right side of the main appointment view, listing various actions like 'Checkout', 'Retail', 'Early Cancel', 'Mark Confirmed', 'Mark Arrived', 'Reschedule', 'Modify', 'SOAP Note', and 'Rebook'. The footer includes the Mindbody logo and copyright information for 2025.

This screenshot is identical to the first one, but the 'Add-ons' section now shows a dropdown menu with 'FEES' selected. Under 'FEES', the option 'weekend /PH Surcharge' is highlighted with a red circle. The rest of the interface, including the appointment details and the right-hand action menu, remains the same as in the previous screenshot.

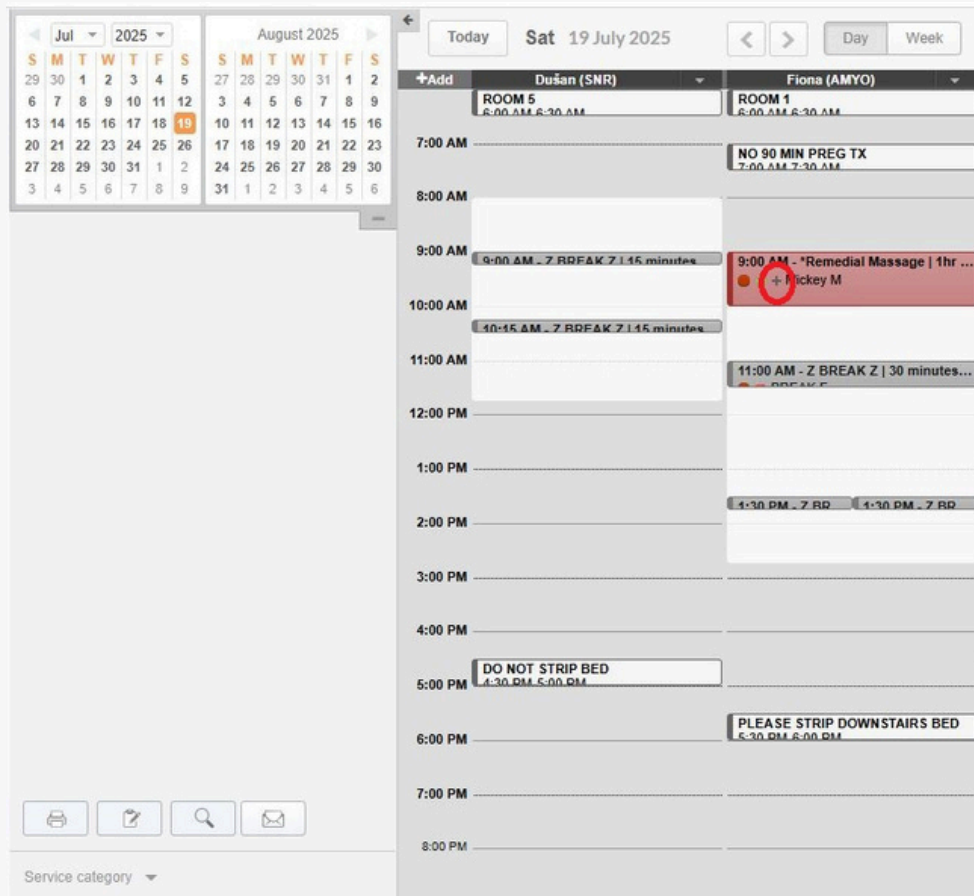
Step 3: Click on the 'add' button to add the surcharge to the appointment. You will notice that the therapist name should be automatically chosen.



Step 4: Press save on the appointment to finish adding the surcharge.



Step 5: You can make sure the surcharge was successfully added to the appointment by looking for the plus symbol.

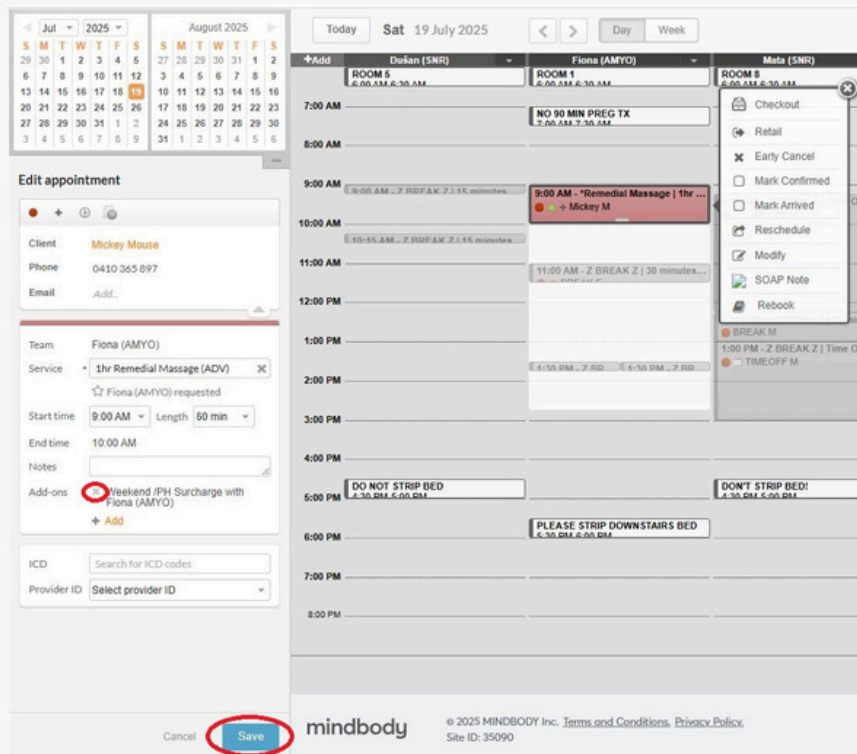


REMOVING THE SURCHARGE FROM APPOINTMENTS

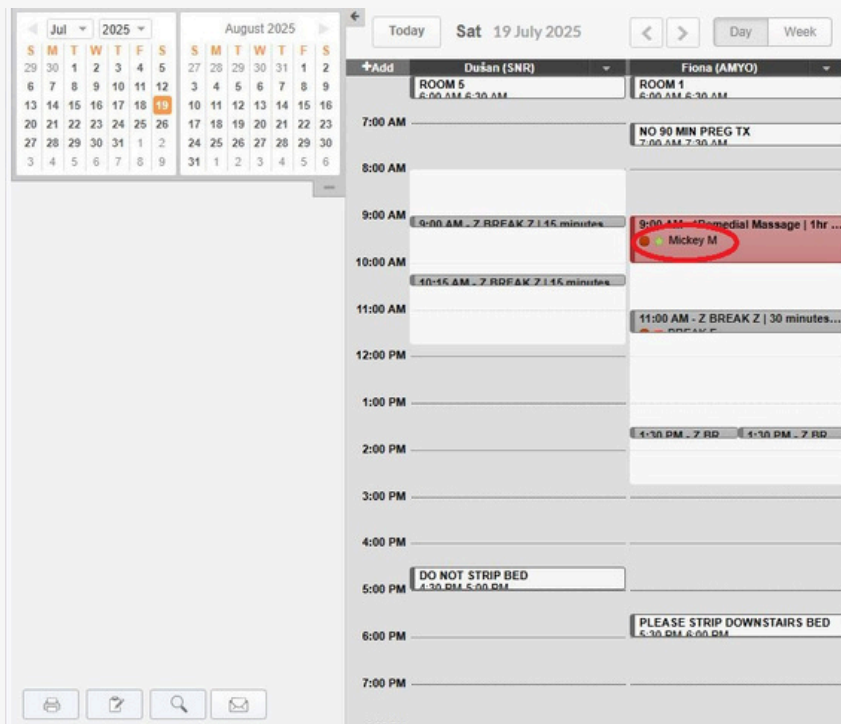
You may need to removed the surcharge from an appointment if you are changing the appointment to a MALC. If you have a MALC appointment with the surcharge you will be unable to move the appointment to the cancellations column in Mind Body,

Please note that if charging a MALC appointment we do not charge clients the surcharge as well.

Step 1: Open the clients appointment that you wish to removed the surcharge from. Click on the 'x' next to the weekend/ PH surcharge. The surcharge will then be removed from the appointment and you can press save to update the change.



Step 2: You can make sure the surcharge was successfully removed from the appointment by seeing that the plus symbol as been removed.



RETAILING APPOINTMENTS WITH THE SURCHARGE

Before retailing an appointment on a weekend / public holiday double check that the appointment has the weekend surcharge already added to it. If you notice the surcharge is yet to be added, add the surcharge to the appointment before retailing.

Step 1: Retail the appointment as you normally would. You will notice on the retail screen that the surcharge sits separately to the appointment charge. To add the surcharge to the payment click add item, make sure to do this to for the appointment fee as well.

The screenshot shows the Mickey Mouse retailing interface. The 'TICKET' section on the left is empty, displaying '-- No Items Selected --'. The 'Add Item' section on the right shows two items added to the ticket:

Item Name	Price	Qty	Discount	Amount
1hr Remedial Massage (ADV) w/Fiona (AMYO)	\$128.00	1	0.00	\$128.00
Weekend/PH Surcharge w/Fiona (AMYO)	\$5.50	1	0.00	\$5.50

The total for the items is \$133.50. The 'Add Item' buttons for both items are circled in red.

Step 2: After adding both the surcharge and the appointment fee to the ticket you can finish retailing the appointment as normal.

The screenshot shows the Mickey Mouse retailing interface with the 'Payment Info' section. The 'Amount Remaining' is \$133.50. The 'SELECT A PAYMENT METHOD' dropdown menu is open, showing various payment options:

- Cash
- Cheque/Invoice Payment
- CC (Key/Stored)
- Direct Debit
- Credit Journal
- Trade
- Account
- HICAPS
- EFTPOS/Credit Card
- Pay Deduction
- AMEX
- Prepaid Gift Card

RETAILING SURCHARGED APPOINTMENTS WITH A PROMOTION

If a client would like to use a promotion code (e.g. BIRTHDAY20) on a weekend or public holiday you will need to slightly adjust how you retail the appointment. If you follow the above steps and then apply the discount Mind Body will discount both the appointment price and the surcharge. Please see the photo below for an example. We never want to discount the surcharge and only want to discount the appointment cost.

The screenshot shows a retailing interface for 'MICKEY MOUSE'. At the top, there is an 'Assign Gift Card' section with an input field and an 'Assign' button. Below this is the 'TICKET' section, which includes a dropdown for 'Select a sales rep' (set to 'Newmarket'), a date field (2/04/2025), and buttons for 'Save Ticket' and 'Print Ticket'. The main table lists items with columns for 'Item name', 'Qty', 'Price', 'Discount', and 'Total'. The first row is '1hr Remedial Massage (ADV)' with a quantity of 1, a price of \$128.00, a discount of 15.62% (\$20.00), and a total of \$108.00. The second row is 'Weekend/PH Surcharge' with a quantity of 1, a price of \$5.50, a discount of 100.00% (\$5.50), and a total of \$0.00. Below the table, there is a 'PROMOTION CODE' input field with an 'Apply' button and a green message 'PROMOTION APPLIED!'. At the bottom, a summary table shows 'SUBTOTAL' as \$133.50, 'DISCOUNT' as -\$25.50, and 'GRAND TOTAL' as \$108.00, with a note 'incl. tax of \$9.82'. The 'Payment Info' section includes a 'SELECT A PAYMENT METHOD' dropdown with options: Cash, Cheque/Invoice Payment, CC (Key/Stored), Direct Debit, Credit Journal, Trade, Account, HICAPS, and EFTPOS/Credit Card. The 'Amount Remaining' is \$108.00, and a prompt says 'Please select a payment method'.

Item name	Qty	Price	Discount	Total
1hr Remedial Massage (ADV)	1	\$128.00	15.62%, \$20.00	\$108.00
Weekend/PH Surcharge	1	\$5.50	100.00%, \$5.50	\$0.00

SUBTOTAL	DISCOUNT	GRAND TOTAL	incl. tax of \$9.82
\$133.50	-\$25.50	\$108.00	

To avoid this from happening:

Step 1: Add the appointment to the ticket.

Step 2: Apply the discount code, this will only cause the discount only apply to the appointment price.

Step 3: Add the surcharge to the ticket.

Step 4: Finish retailing the appointment as normal.

WEEKLY CLEAN SHIFTS

Weekly at every clinic there are clean shifts. These shifts are to be completed by the rostered on receptionist on the designated day. These shifts are very important in maining our clinics clean atmosphere and ensure our therapists have all the tools they need during treatment.

WHICH DAY THE CLEAN OCCURS AT EACH CLINIC

GREENSLOPES: the downstairs is cleaned on a Monday morning and the upstairs is cleaned on a Tuesday morning. For both of these cleans there will be a receptionist rostered on specifically to complete the clean.

NEWMARKET: The whole clinic is cleaned on Tuesday morning. It is the receptionist that is rostered on for the Tuesdays responsibility to complete the clean shift.

TARINGA: The whole clinic is cleaned on xxxx morning. It is the receptionist that is rostered on for the Tuesdays responsibility to complete the clean shift.

FORTNIGHTLY EXTERNAL CLEANERS

Fortnightly we have an external cleaner come into all three clinics on a Sunday to complete some cleaning tasks. Due to this the duties that need to be completed change depending on if the cleaners were in that fortnight. The cleaners are responsible for:

General Office Areas	Description
Entrances	Spot clean entry doors to remove marks.
General office areas / Receptions / Waiting room areas	Spot clean walls, doors and around light switches to remove marks. General dusting of horisontal surfaces, window sills, shelves, ledges, office equipment, office furniture and skirting boards.
Staff rooms	Vacuum and wet mop floors
Floors	Vacuum all areas and wet mop hard floors & stairs
Massage rooms	Description
Mirrors	Full clean mirrors to remove marks
General Areas	General dusting of horisontal surfaces, massage bed support structures and skirting boards. Spot clean walls, doors and around light switches.
Glass wall partitions	Spot clean all glass partitions to remove marks & smudges.
Floors	Vacuum all floor areas & wet mop solid floors.
Restrooms	Description
Toilets	Clean and sanitise, cisterns, pedestals and seats.
General Areas	Spray and wipe hand basins, vanities, tapware & other fixtures. Polish mirrors,.Spot clean walls and doors to remove marks.
Showers	Spray and wipe shower recess, tapware and glass partitions.
Floors	Remove loose litter, vacuum and mop tiled floors using commercial grade disinfectants.
Notes	Description
Mop heads	Cleaners to rotate mop heads after each clean.

WEEKLY CLEANING DUTIES TO BE COMPLETED BY RECEPTION

MASSAGE ROOMS:

- Strip massage beds and pillows of all linen and wash all bed base covers and pillow cases. Once washed and dried remake the beds and pillows. *PHOTOS IN HOW TO*
- Wipe down arm rests, head support and massage beds with disinfectant and report any tears in the beds. *PHOTOS IN HOW TO*
- Refill any products that are running low (e.g. disinfectant, paddle pop sticks, melrose oil, coconut oil)
- Empty any bins in massage rooms

TEA ROOMS:

- Clean the fridge and throw out any old food
- Refill any soaps and paper towel dispensers

RECEPTION AREAS:

- Clean water filters by pulling them apart, replace any filters that are empty *PHOTOS IN HOW TO*
- Refill water fillers, restock cups if needed

MISC:

- Wipe down outside of washing machine and inside the seal

FLOORS:

- If the clean is being done on a Tuesday all hard wood floors in the clinic will need to be vacuumed.

WHEN EXTERNAL CLEANERS ARE NOT IN

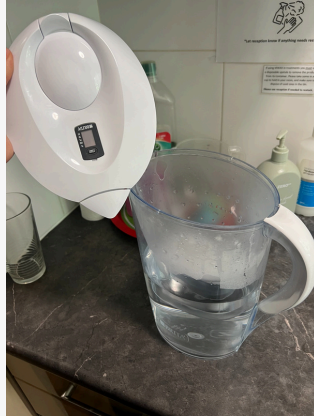
The week that external cleaners are not in it is the receptionist duty to complete all of the tasks that the cleaners complete as well as the regular cleaning duties listed above.

HOW TO REMAKE AND WIPE DOWN A MASSAGE BED



HOW TO CLEAN BRITA WATER JUGS

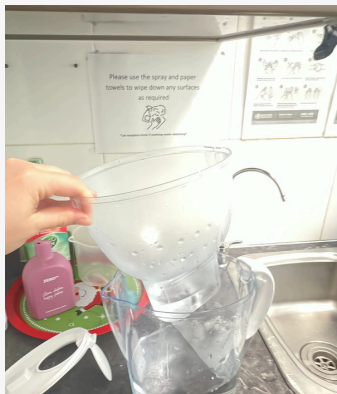
Step 1: Removed the lid from the top of the water filter and clean the top and bottom with warm soapy water. Rinse then set aside to dry.



Step 2: Tip out the water in the jug. Pull out the filter and if its still good put it aside on clean paper towel, if its finished put it in the bin.



Step 3: Remove the top compartment by pulling it out near the spout. Tip out any remaining water from the bottom compartment. Clean both the inside and outside of the top and bottom compartments with warm soapy water and rinse.

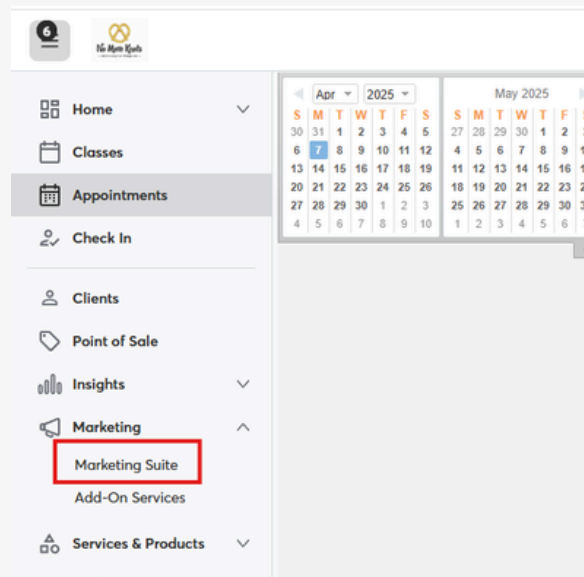


MONTHLY FEEDBACK REVIEW REPORT

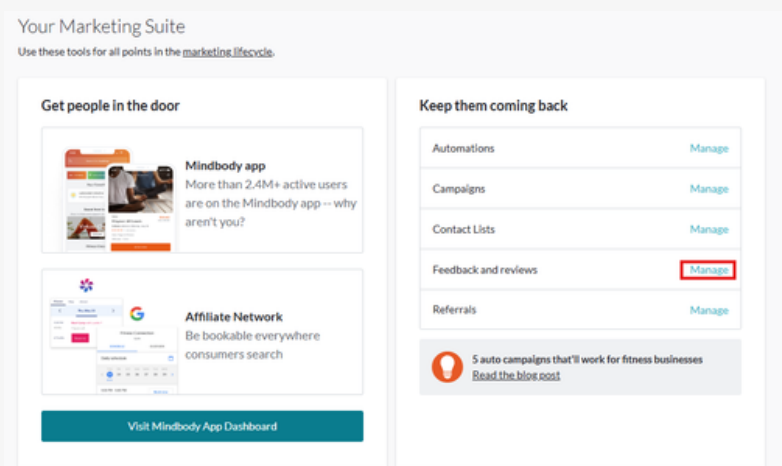
The monthly feedback review report is completed at the start of the month for the month before, ie – in early April run the report for the whole of March. This report collates all reviews that clients have given in response to our feedback emails. Once you have run the report and exported it to excel it is then emailed to the general manager.

INSTRUCTIONS

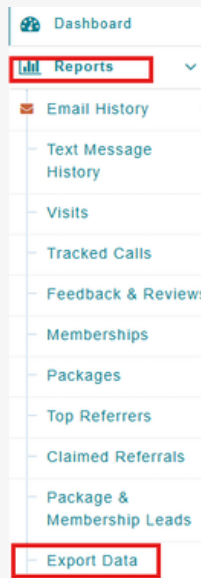
Step 1: In MindBody go to Marketing located on Left Hand Side of screen and Select Marketing Suite



Step 2: Select Manage next to Feedback & Reviews, this will open a new tab.



Step 3: Select Reports, then from the drop down menu choose Export Data, this will open another new tab.



Step 4: Under **Select Report Type**, choose **Review Report** from the Drop Down Menu. set the date range of month before, **Select location** (you will need to run the report for each location individually and can only generate 1x report at a time). Then hit **Run Report**.

A screenshot of a form titled 'Export to CSV'. The form has several sections: 'Select a report type' with a dropdown menu showing 'Review Report'; 'Select a date range and locations' with two input fields labeled '* From' and 'to'; three checkboxes for location selection: 'All locations', 'No More Knots Taringa', and 'No More Knots Greenslopes'; and a 'No More Knots Newmarket' checkbox. A blue 'Run report' button is at the bottom. Red boxes highlight the 'Review Report' dropdown, the 'From' and 'to' input fields, the 'No More Knots Greenslopes' checkbox, and the 'Run report' button.

Step 5: Refresh Report to get the download (might need to do this a few times). Download and open in excel

Step 6: In excel delete columns date except the following Data: Date, Score, First/ Last Name of Client, Therapist Name (will have to rename this column), Content (rename column to Comments).

Step 7:

- In excel Resize columns to 15 except the comments column (this will be resized to 40 and wrap text)
- Bold and underline the headings
- Put borders around all the data
- Bold the data in the score column and centre the data
- Highlight the score column
- Put filters on Therapists names so easy to copy and paste data for each therapist into email template
- Save as an Excel Spreadsheet (not comma CSV) named Review Report (Clinic) (insert Month).

Your spread sheet should look like this:

	A	B	C	D	E	F
1	Date	Score	FirstName	LastName	Therapist Nam	Comments
2	31/03/2025	10	first name	last name	Trung (ADV)	Trung is so knowledgeable and does an amazing job!
3	31/03/2025	10	first name	last name	Mata (SNR)	Good conversation with expert therapist
4	31/03/2025	10	first name	last name	Alex (ADV)	Alex knows his stuff
5	30/03/2025	10	first name	last name	Sam (SMYO)	Sam identified my cause of pain and discomfort in my shoulders and attended to that to my satisfaction.
6	30/03/2025	10	first name	last name	Debbie (SNR)	
7	30/03/2025	10	first name	last name	Mata (SNR)	
8	30/03/2025	10	first name	last name	Paul (SMYO)	
9	29/03/2025	10	first name	last name	Sam (SMYO)	Sam is awesome. I see him every fortnight and he always assists my alignments - and there has been a few of recent!
10	29/03/2025	10	first name	last name	Matt (ADV)	Sam is friendly and highly experienced.
11	29/03/2025	10	first name	last name	Paul (SMYO)	
12	28/03/2025	10	first name	last name	Fiona (AMYO)	
13	28/03/2025	10	first name	last name	Alex (ADV)	
14	28/03/2025	10	first name	last name	Amy (SNR)	Amy is fabulous and does a really great job. Highly recommended!
15	28/03/2025	10	first name	last name	Debbie (SNR)	Deb was fantastic
16	27/03/2025	9	first name	last name	Alex (ADV)	Parking problematic
17	27/03/2025	10	first name	last name	Debbie (SNR)	Issue feeling better already.
18	27/03/2025	9	first name	last name	Amy (SNR)	
19	27/03/2025	10	first name	last name	Fiona (AMYO)	Fiona gave a thorough treatment
20	27/03/2025	10	first name	last name	Paul (SMYO)	
21	26/03/2025	10	first name	last name	Amy (SNR)	
22	26/03/2025	10	first name	last name	Alex (ADV)	
23	26/03/2025	10	first name	last name	Debbie (SNR)	
24	25/03/2025	10	first name	last name	Nathan (AMYO)	

Step 8: Once you have followed steps 1-7 for each of the three clinics attach all 3x Clinics data to an email addressed to the General Manager and CC in marketing@nomoreknots.com.au
Subject: Review Reports **MONTH** **YEAR**