CLINIC AUTOMATION + DASHBOARD KIT

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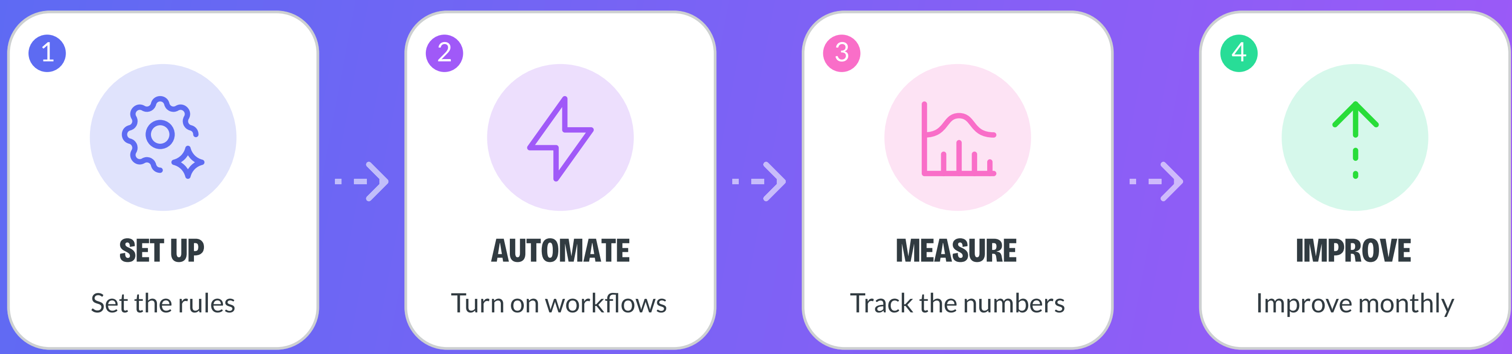
A simple 30-day setup plan to reduce admin, improve workflows, and track what is working.

Most clinics know automation can save time, but the harder question is what to set up first.

This kit gives clinic owners, practice managers, and admin leads a practical 30-day plan for improving bookings, reminders, forms, payments, recalls, and reporting.

THE WORKFLOW



Reduce admin in 30 days. Keep improving every month.

WHAT TO SET UP FIRST

Automation works best when clinics build one workflow at a time.

Start with the tasks that create the most repeated admin:

- Booking calls
- Reminder chasing
- Missing forms
- Unpaid invoices
- Follow-up reminders
- Reporting clean-up

The goal is not to automate everything at once. The goal is to set up simple workflows that save time every week.

Your four-week plan

WEEK	FOCUS →	GOAL
Week 1	Booking rules	Decide what can be booked online
Week 2	Reminders, forms, recalls and waitlists	Help patients arrive prepared and fill gaps
Week 3	Payments and upfront payment rules	Make payments easier to collect
Week 4	Dashboard review	Track what improved

Quick rule: *Start narrow, review what happens, then expand.*

WEEK 1: SET CLEAR BOOKING RULES

Online bookings should save time, not create calendar clean-up. Start by deciding which appointment types are safe to book online, which practitioners are available, and which services need triage or manual review.

Booking rules checklist

Use this checklist to decide what should be available online.

- Choose which appointment types are bookable online
- Decide if new patients can book online
- Set practitioner availability
- Set minimum lead times
- Set cancellation and reschedule cut-offs
- Decide if upfront payments are needed for selected appointments
- Keep complex appointments as “request a booking” if needed

Booking setup worksheet

APPOINTMENT TYPE	BOOKABLE ONLINE?	NEW PATIENTS?	LEAD TIME	CANCELLATION CUT-OFF	UPFRONT PAYMENT?	TRIAGE?
Initial consultation	Yes / No	Yes / No			Yes / No	Yes / No
Follow-up	Yes / No	Yes / No			Yes / No	Yes / No
Complex assessment	Yes / No	Yes / No			Yes / No	Yes / No
Long appointment	Yes / No	Yes / No			Yes / No	Yes / No
Group session	Yes / No	Yes / No			Yes / No	Yes / No

Tip: *Start with simple appointment types first. Once the workflow is working well, add more services later.*

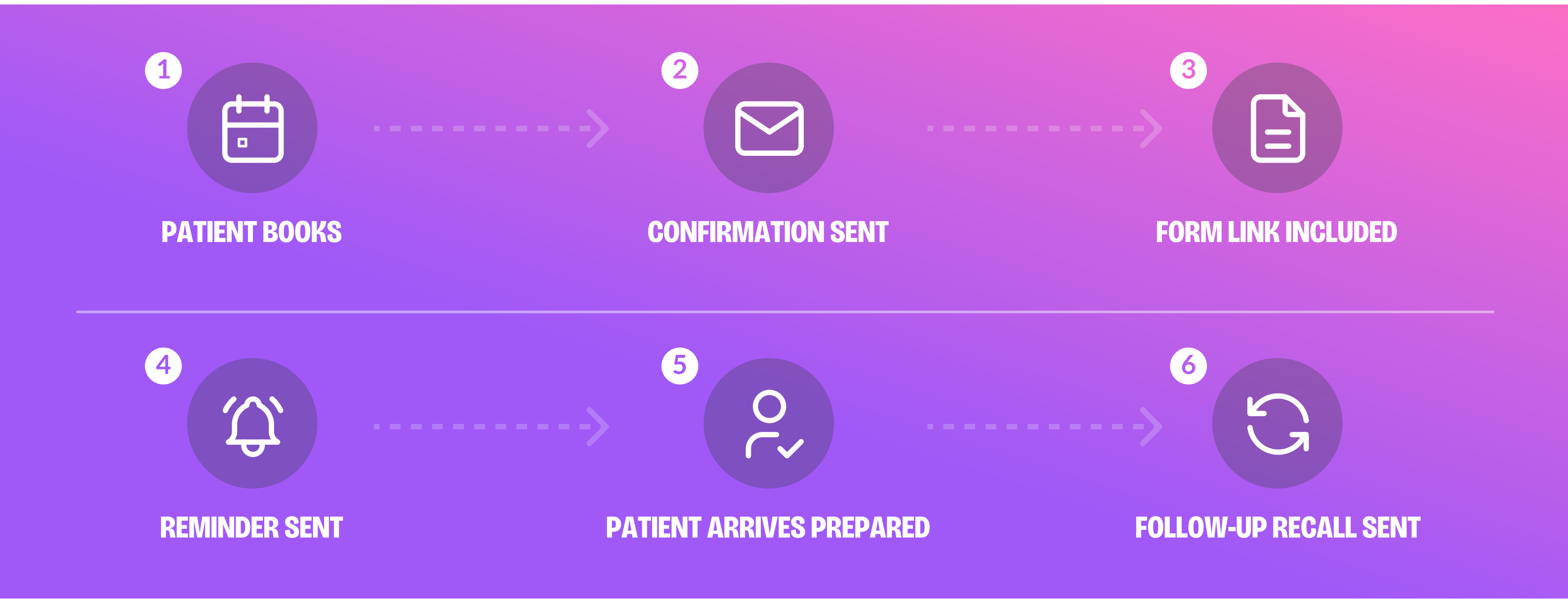
WEEK 2: MAKE PATIENT COMMUNICATION DO MORE OF THE WORK

Reminders are not only for reducing no-shows. They can also help patients complete forms, understand what to do before arrival, and reschedule without calling the clinic.

Communication checklist

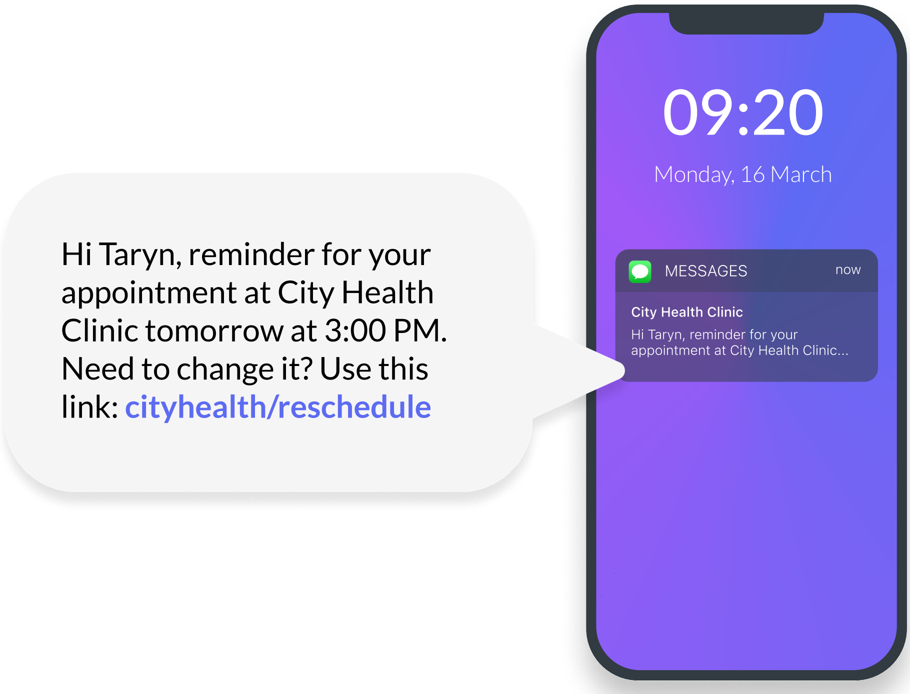
- Send a confirmation after booking
- Add intake form links to confirmation emails
- Add consent forms where needed
- Set a 24-hour SMS or email reminder
- Add a reschedule link where appropriate
- Use an extra reminder for high no-show services
- Create a recall message for patients due to return
- Create a waitlist message for cancellation gaps

EXAMPLE WORKFLOW



Template: 24-hour reminder SMS

Hi [FirstName], reminder for your appointment at [Clinic] tomorrow at [Time]. Need to change it? Use this link: [SmartLink]. Reply STOP to opt out.



Template: Intake form prompt

Please complete your intake form before your appointment. It takes 2–3 minutes and helps your clinician prepare: [PortalLink].

Template: Recall email

Subject: Time for a follow-up?

Hi [FirstName],

We'd love to help you stay on track. You can book your next appointment here: [SmartLink].

Thanks, [Clinic]

Tip: *Keep messages short and make the next step obvious.*

WEEK 3: MAKE PAYMENTS EASIER TO COLLECT

Payment workflows should be simple for both patients and staff.

Clinics can reduce admin by adding payment links, using clear invoice templates, and applying upfront payments only where they make sense.

Payment workflow checklist

- Add pay-by-link to invoice templates
- Create a simple payment reminder
- Decide which services need upfront payments
- Write a plain-English payment policy
- Create a card-on-file explanation script
- Review overdue invoice follow-up
- Make refund or credit wording clear

When to use upfront payments

Upfront payments do not need to apply to every appointment.

They are most useful for bookings that are longer, harder to refill, or more likely to be missed.

Consider upfront payments for:

- Long appointments
- New patient bookings
- Peak-time slots
- High-demand services
- Services with higher no-show risk

Template: Payment policy
You can change or cancel up to 24 hours before your appointment at no cost.

Missed or late cancellations may incur a fee to cover the reserved appointment time.

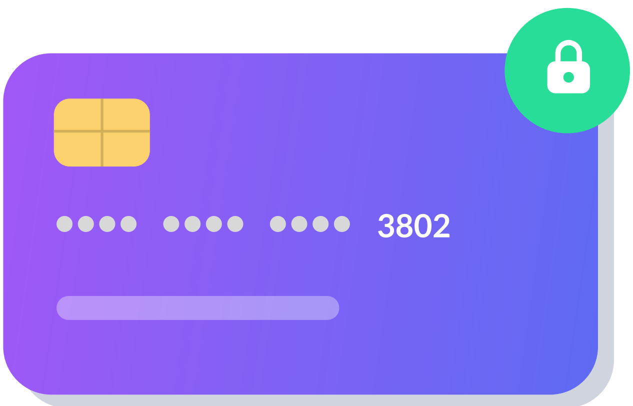
Some longer or high-demand appointments may require a small upfront payment, which is credited to your visit.

Template: Pay-by-link SMS
Hi [FirstName], your invoice from [Clinic] is ready. You can pay securely here: [PaymentLink]. Reply STOP to opt out.

Template: Card-on-file script
With your permission, we can securely store your card so checkout is faster next time.

You can remove it anytime, and we will only charge approved amounts.

Tip: *The goal is not to make payments harder. It is to make them easier to collect and manage.*



WEEK 4: TRACK WHETHER AUTOMATION IS WORKING

Automation should lead to visible improvement.

Clinics do not need to track everything. They only need a few numbers that show whether admin is reducing and workflows are running more smoothly.

Core clinic KPIs to track:

KPI	WHAT IS SHOWS
Online booking share	How many patients are booking online
No-show rate	Whether reminders and booking rules are helping
Paid at booking or visit	Whether payment workflows are working
Overdue invoices	How much payment chasing remains
Recall conversion	Whether recalls are bringing patients back
Utilisation	How full the calendar is
Time to next available	How quickly patients can get an appointment
Bookings by source	Which channels are driving bookings

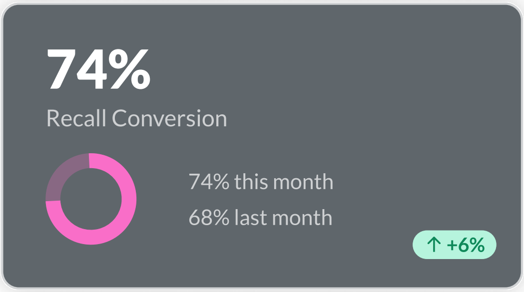
Example dashboard targets

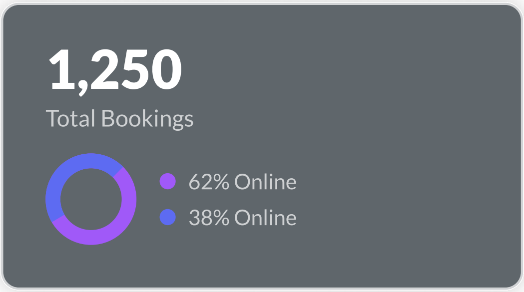
METRIC	BEFORE	AFTER 30 DAYS
Admin time saved	0 hrs	5 hrs/week
Online bookings	32%	58%
No-shows	9.2%	5.1%
Intake completed before arrival	48%	82%
Paid at booking/visit	42%	68%
Recall conversion	8%	16%

What to look for

Ask these questions each month:

1. Are more patients booking online?
2. Are no-shows reducing?
3. Are more forms completed before arrival?
4. Are more patients paying at booking or visit?
5. Are overdue invoices reducing?
6. Are recalls bringing patients back?
7. Are appointment gaps easier to fill?





Tip: *Review the same numbers each month so the team can see what is improving.*

MONTHLY REVIEW: CHOOSE ONE WORKFLOW TO IMPROVE

The dashboard is only useful if the team uses it to take action.

A short monthly review helps clinics spot what is working, what is not, and what to improve next.

30-minute monthly review agenda

TIME	FOCUS	QUESTION
5 minutes	What changed?	Which numbers improved or declined?
10 minutes	What is off track?	Are forms, payments, no-shows, or recalls an issue?
10 minutes	What action will we take?	Which workflow needs adjusting?
5 minutes	Who owns it?	Who will action it before next month?

Monthly action log

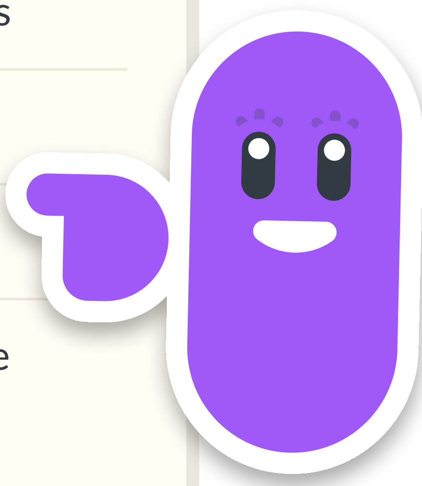
ISSUE	METRIC AFFECTED	ACTION
Forms not completed	Intake completion	Add form link to reminder
No-shows increasing	No-show rate	Review reminder timing
Invoices unpaid	Overdue invoices	Add payment link to invoice
Low recall bookings	Recall conversion	Shorten recall message
Online bookings low	Online booking share	Review available services online
Calendar gaps increasing	Utilisation	Review waitlists and recalls

Monthly rule: *Pick one or two actions. Do not try to fix everything at once. Small improvements, reviewed consistently, are easier to maintain.*

FINAL CHECKLIST

Before the end of your first 30 days, check that your clinic has:

- ✔ Clear online booking rules
- ✔ Reminders connected to forms
- ✔ Recall and waitlists messages ready
- ✔ Payment links added to invoices
- ✔ Upfront payment rule set
- ✔ Simple KPI dashboard built
- ✔ Monthly review rhythm in place



Set up once. Save admin time every week. Review monthly and keep improving.

Start a free trial with Nookal to reduce admin across bookings, reminders, forms, payments, recalls, and reporting.