Business - Constructing Efficient Systems - New Client File

By Dr. Linda Hancock

ABOUT THE AUTHOR

Dr. Hancock has written a regular weekly column entitled “All Psyched Up” for newspapers in two Canadian provinces for more than a dozen years. Over the years, her readers and clients have said that they have benefited from her common-sense solutions, wisdom, and sense of humour. Dr. Linda Hancock, the author of “Life is An Adventure…every step of the way” and “Open for Business Success” is a Registered Psychologist who has a private practice in Medicine Hat. She can be reached at 403-529-6877 or through email office@drlindahancock.com

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Once your prospect has asked for an appointment and you have gathered the necessary information, there are some administrative tasks you need to complete as follows:

1. Enter the appointment in your computer or book. By entering the full name(s) and telephone number you will be able to contact the client without looking in a manual file. Also, I like to enter the method of payment (Employee Assistance company, Self or other details).

2. Assign a file number. Beside files need to be kept for a number of years to comply with Income Tax and professional standards, I have set up a system to help with that. Each client has a unique number that consists of the year, month and number of new clients in that year. The seventh new client in 2009 who calls me in May would therefore have the file number 09/05/07. I have a form which I keep in a binder that has the following columns to record this: Referral source, year, month, referrals in the year, surname and first name.

3. Prepare a file folder. All of my client files are burgundy in colour so they are easy to identify. I use a white file label with three lines of print: Client file number, name (surname in capitals, comma and then first name) and name of payee (company, insurance or the word "Self")

4. Set up file. I use fasteners to hold the paperwork in the folder. The right-hand side has referral information, reports from others sources and my handwirtten notes with the most current on top. The left-hand side has financial information with a summary sheet on top.

5. Enter the information into the computer bookkeeping system. My Quick Books system allows me to put the client under the company that is paying as "Add Job" and then have another "Add Job" where I enter the file number.

6. File the folder in a cabinet for active clients.

Once you have completed the above, you are ready for the first appointment. There are many times, however, that the client will call to change the appointment time or provide other information. We record every contact on a separate Contact form and immediately hole-punch and put in the file when it is received. That way you never have a pile of notes that can easily be lost or replaced.