



Welcome to your Cliniko Planning Worksheets.

These worksheets have been designed to support you in moving through the program modules with ease and flow. The questions are simple, but important. The more detail you provide here, the easier it will be when setting up your Cliniko account.

## SERVICES YOU OFFER

What Services do you (or will you) be offering in your practice?

E.g. Chakra-puncture,  
Sacred Esoteric Healing,  
Esoteric Massage, Esoteric  
Connective Tissue Therapy,  
Physiotherapy, Relaxation  
Massage, Remedial  
Massage, Counselling.

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Will you be offering any online appointments?

If so, please describe below.

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## How do you communicate your services with clients?

Think about what speaks to them and what is easy for them to understand, digest, and say yes to while still honouring the sacredness of what you practice.

**Example:**

For much of my practitioner life I have used the full name of the modalities as my service offering to clients. These modalities would be seen on my website and used on my Online Bookings Calendar.

SACRED ESOTERIC HEALING  
ESOTERIC CONNECTIVE TISSUE THERAPY  
ESOTERIC BREAST MASSAGE  
CHAKRA-PUNCTURE  
ESOTERIC MASSAGE  
GENERAL HEALING SESSION

This worked well for many years and was an important part of my development with expressing and representing the modalities. What I found is that many clients were overwhelmed with the choice of treatment types and often said to me that they didn't know which one to book. For this reason I added General Healing Session and used to direct these clients to book a General Healing Session where we could decide within the session what type of modality they would receive.

Recently I simplified what clients could book in for on my calendar. These are the current services I have on offer:

ESOTERIC BODYWORK & MASSAGE  
CONNECTIVE TISSUE THERAPY  
WOMEN'S HEALTH CONSULTATIONS  
RELAXATION MASSAGE  
REMEDIAL MASSAGE  
HEALING

All of the modalities are still showcased on my website (Sacred Esoteric Healing, Esoteric Massage, Connective Tissue Therapy, Chakra-puncture, Esoteric Breast Massage) but instead come under the heading of Healing, Women's Health and Massage. This means that when clients go to book it is simpler for them to feel what it is they actually feel to book in for.



## APPOINTMENT TYPES

In the table below write the name of each session you will be offering in your business and the duration of the session as you would display it on your online bookings. If you have 2 session lengths for a modality write them as two separate offerings. E.g Relaxation massage 1 hr, Relaxation massage 1.5 hrs

This is known in Cliniko as Appointment Type and will be shown on your online bookings page.

SESSION NAME

DURATION

SESSION NAME	DURATION



## A Note Regarding Appointment Types:

Not all Appointment Types will be shown on your online bookings page. You can choose which ones are shown or not.

For Example: Do you offer any discounts?

When I am seeing people twice a week during the Chakra-puncture detox program I offer a reduced rate for each session. This is another Appointment Type that has a billable item but I don't show this as a service on my online bookings page. I don't allow clients to book online for Chakra-puncture detox sessions, these programs first need to be approved by me as something that will be beneficial for my client and requires a discussion. A client would normally book a Chakra-puncture session with me and then if we decide to start a detox program I will make the rest of the bookings through the backend of the calendar. In other words these appointments are booked by me.

Another example of an Appointment Type that I don't allow to be shown on my online bookings system is 90 min Healing session. I run my Calendar with hourly appointments but occasionally I will have a client who would like a longer session. Most clients book 2 sessions back to back in this case but sometimes on discussion I will book a client in for a 90 minute session at a time that won't disrupt the flow of my calendar.





## BILLABLE ITEMS

Now think about what your sessions need to be billed as. . . .

What are the names of your services (appointments) that your client will require on their invoices? This may be the same name as your Appointment Type (found on your bookings page) or it may be different. This depends on whether you practice modalities that are claimable under health insurance (massage, physio, counselling) or if you offer services that can be used as a business tax deduction or reimbursed through a scheme like NDIS (National Disability Insurance Scheme).

For example: You might offer Sacred Esoteric Healing, Esoteric Massage, Chakra-puncture and Esoteric Connective Tissue Therapy but bill them all as 1 hr healing session, 90 min Healing session, 2 hour Healing session.

You might also offer counselling but when it comes time to invoicing your client, you need to bill them as a specific type of counselling with a particular code. You might have 3 different types of counselling that you can bill clients with but only have one appointment type people can select on your website / online booking system.

Do your services need to be written in a certain way on your invoice?  
Write below the way your services will need to be displayed on your invoices.

**These are known as BILLABLE ITEMS in Cliniko**

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Do any of your billable items (services) need to have a code provided on your invoice?  
Write any codes next to the billable items in the above question.



## Associations & Systems

Tick any of the below associations or systems that you are part of and add in others that are not listed below.

- Private Health Insurance Claims
- Medicare Claims
- Business Claims
- NDIS
- Association Membership
- OTHER

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What do these insurances, associations etc need you to write on your invoices? Do you have a membership number?

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## PRODUCTS

Do you currently sell any products in your clinic?

If you do, what are they?

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Are there any products that you would like to sell in your clinic in the future?

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What needs to be written on your invoice?

- Your Name (Business Name)
- Date
- Address
- Business Number
- Your contact details
- Your client's details
- Product / Service details (what was purchased)
- Payment details
- Codes / registration / membership numbers for clients to claim your services
- Bank Account details for payment
- Other \_\_\_\_\_

You can write any extra information required on your invoice in the default notes section of your invoice settings. This is explained in the Invoice Module.



## PAYMENT TYPES

How do your clients pay for their appointments?

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There are many different ways that payment can be taken for appointments. Examples include:

- EFTPOS
- Online Pre-payment (stripe)
- Bank Transfer
- Cash
- Cheque
- Hicaps

NOTE: It's important think about the way you do your accounting and what information you need to record.

**This completes the Cliniko Planning Worksheets  
ENJOY THE PROGRAM.**