PracticeQ

Your quick guide to PracticeQ automation

Pick the ideas that fit your practice, check them off as you go, and let the system take care of the rest.

BRANDING & INTAKE

- [ ] Customize form headers with provider contact info
- [ ] Set unique email sender names for providers or the practice
- [ ] Create separate questionnaires for adults, minors, and specialties
- [ ] Attach consent forms automatically by provider/appointment
- [ ] Customize messages for invitations, reminders, and incomplete forms

PRE-VISIT SETUP

- [ ] Preload invoices/superbills with business info and tax IDs
- [ ] Tailor intake instructions for in-person vs. virtual visits
- [ ] Automate portal invitations and welcome messages
- [ ] Send telehealth links 60 minutes before sessions
- [ ] Text parking/directions 30 minutes before visits

DURING & POST-VISIT

- [ ] Enable QR code check-in with provider alerts
- [ ] Auto-charge cards an hour after visits, with follow-up if needed
- [ ] Remind providers to generate superbills after appointments
- [ ] Trigger follow-up packets post-visit

ONGOING EFFICIENCY & ACCESS CONTROL

- [ ] Limit staff visibility to assigned patients
- [ ] Customize portal settings and autoresponders to cut inbox load
- [ ] Audit notifications so staff get alerts for key patient actions

➡️ AND FOR MAXIMUM IMPACT

PracticeQ

Automation impact

Where to focus first for maximum payoff

🏆 BIG WINS

- Auto-charge payments after visits
- Trigger onboarding forms & portal invites at booking
- Telehealth links sent 60 min before

⚡ QUICK WINS

- Auto-text directions before visits
- QR code check-in alerts
- Superbills sent immediately after visits

⚙️ SET & FORGET

- Preloaded invoice/superbill templates
- Branded email/form headers
- Link visit instructions to appointment types

💡 NICE-TO-HAVE

- Post-visit educational materials
- Seasonal patient messages
- Routine follow-up reminders