What to do Before You Hire Your First Virtual Assistant

Hiring a virtual assistant in your business is an important milestone. Congratulations! You are busy enough that you need to hand off work to another individual so that you can focus more on only what you can do in the practice.

The thought of hiring a virtual assistant often feels overwhelming for practice owners because they don’t even know where to start. You have been doing the job for so long you aren’t even sure how to communicate what you do to someone else!

We have put together this document to help you think through what you need to do in order to prepare to hand off some of the work in your practice to a virtual assistant. This certainly isn’t meant to be an exhaustive list, but a handy guide to get you started.

1. **Make a list of all of the “systems” you use** in your practice. Decide if you want your VA to also use all or some of these systems and set up usernames/passwords for access. For example:
   - Electronic Health Record
   - Phone System
   - Fax
   - Email
   - Insurance company portal

2. **Next you will want to document your “processes”** that happen within those systems. The step by step instructions of how to do a task, like schedule a new client, etc. A good place to do this is in Google Docs so it can be shared with your VA and it can also be edited/updated as things change in your practice. The following are lists of common processes that happen in a private practice:

   - **Processes for New Clients:**
How new client inquiries are screened for appropriateness. VA needs info for local crisis center and list of other providers to refer out
How new clients are scheduled for their first appointment
How VA will respond to email inquiries
How you collect insurance info, check benefits, etc and how is this documented
How to communicate to clients what to expect at the first appointment
How will clients fill out initial paperwork and how does the VA communicate this
How to track where referrals are coming from and how many, why some are not being scheduled
How VA will communicate to therapists they have a new appointment scheduled

Processes for Ongoing Client Activities:

How will clients be reminded of their appointments (automated or manual)
How clients will be reminded of the late cancel/no show fee
How will ongoing client appointments get scheduled/rescheduled
How will issues related to uncollected payments/insurance payment problems be handled (use of an “aging report”)
How VA will communicate schedule changes to the therapist
How will VA enter Explanation of Benefit (EOB) info into the system
How will VA help with drafting letters to PCP’s/referral sources

3. Set standards for your processes. You can give your VA guidelines of a time frame when these tasks should be completed, or what you want the outcome to be. Examples include:
- Phone calls that go to voicemail should be returned within 2 hours during regular business hours.
- Insurance benefits are verified and communicated to the client in advance of their first appointment.
- 80% of new client inquiries will be converted into scheduled appointments.

4. Set up a system of good communication with your VA. You will want to make sure you are checking in with your VA periodically to make sure everything is running smoothly. You will also want to set up the expectation that you will give her/him constructive feedback on their work as needed. There could be multiple ways that you
could do this, there really isn’t a “right or wrong” way to do it. As long as you are consistent with communicating with your VA that is all that matters. Some examples of how to do this include:

- Having a monthly “check in” meeting over the phone or video chat to discuss what is going well and what is not going well. Invite your VA to offer solutions to problems they see. Collaborate on how changes could be made to make things better.
- Every 1-2 weeks have your VA fill out a google form to communicate what is going well or what is not going well. Plan to follow up as needed via email, phone or video chat.
- Use software like Trello, Wunderlist, Slack, etc. to communicate details about special projects or changes to your VA.
- During your initial training meeting with your VA let them know you plan to communicate with them if there is something they haven’t done correctly or if a mistake was made. Ask your VA how that type of feedback would best be communicated so that they can learn from it.

We hope the information presented here was helpful to you. Even though it seems like a lot of things to think about, once you start writing down what administrative tasks you are doing in your practice it will probably flow quickly. Don’t worry if you don’t have everything documented before your VA starts. They can help fill in the gaps and edit the documents as they start working for you.

Hiring a great VA will be a stress reliever for you as a business owner! You will be glad you took this step in growing your business.

**Are You Ready to Hire Your First VA?**

Contact us to discuss your virtual assistant needs. We want to make sure we are a good fit before you start.

**Email us to set up a phone call: info@moveforwardvirtualassistants.com**