

THE CLINICIAN COMPANION

SERVICES GUIDE

EVERYTHING YOU NEED TO KNOW

Contents

the **cl**in**i**cian
companion

- 3 — Introduction
- 4 — Services Overview
- 5 — Private Practice Setup Packages
- 8 — Ongoing Admin & Client Support
- 10 — Bookkeeping & Business Operations
- 12 — Branding & Content Design
- 14 — How It Works
- 15 — Testimonials
- 16 — Get In Touch

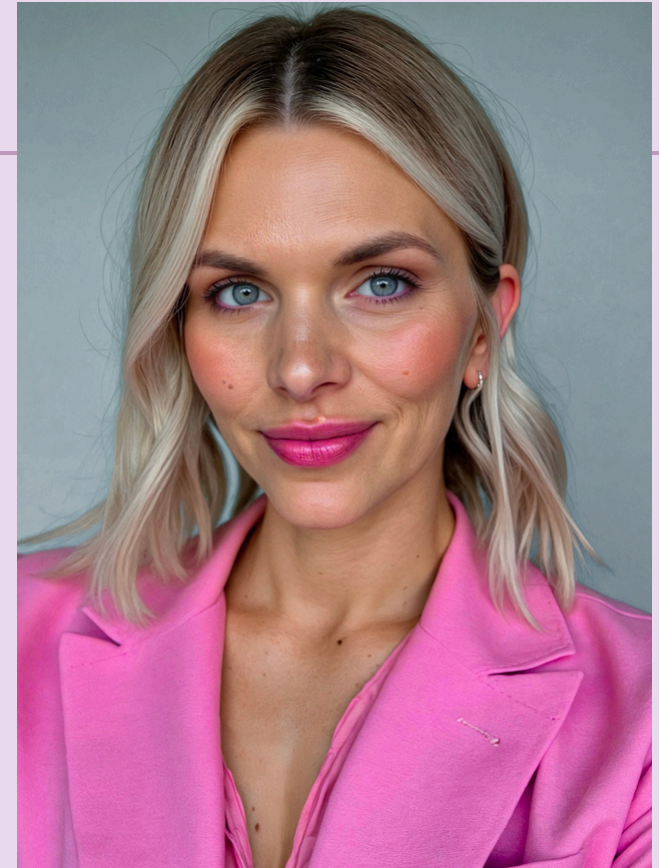
Hi, I'm Charlie.

I'm here to help you run a thriving practice — without the overwhelm.

Running a private practice can be incredibly rewarding, but it can also be a juggle. From managing bookings and billings to chasing paperwork and building your brand, the behind-the-scenes work can be relentless.

That's where I come in: virtual assistant, admin whiz, graphic designer, and practice setup strategist. With experience across mental health admin, bookkeeping, practice systems, and visual branding, I'm the all-rounder you didn't know you needed.

Whether you're just starting out or scaling up, I offer customisable services to help you reclaim your time, streamline your systems, and run your business with more clarity and less chaos.



Services

// WHAT WE OFFER



Practice Setup

For clinicians just getting started or ready to take their systems to the next level.



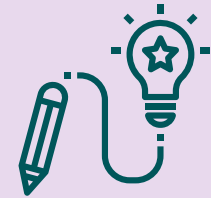
Ongoing Admin

Flexible help with client communications, referral letters, file management, and systems upkeep.



Bookkeeping

Simple, no-fuss monthly packages to keep your books (and BAS prep) up to date.



Design & Digital

Design support for social media, online presence, and business resources.

Practice Setup



For psychologists, social workers and counsellors setting up solo or small team private practice.

The Clinician Companion offers done-for-you setup packages designed to help you launch smoothly, professionally, and without the late-night Googling.

Whether you're starting from scratch or rebuilding the back end of your practice, there's a package to match your goals and budget.

Your Investment

Complete Private Practice Setup Packages

LAUNCH LITE

A foundational package for new or part-time practitioners who need essential systems in place to begin seeing clients confidently.

This includes:

- Practice Management System setup with 1-hour Zoom training
- ASIC company registration and/or business name registration
- Business email and domain setup
- Xero or QuickBooks setup

Includes cost of registration, email hosting and domain fee for 12 months

Investment: \$1600

STREAMLINE & SOAR

Ideal for practitioners who already have a basic setup and want more automation, visual branding, and streamlined systems.

This includes:

- **Everything in Launch Lite**
- 1-hour Xero or QuickBooks training
- Social media account creation (IG + FB)
- 5 Branded Canva templates
- Basic branding suite (logo, letterhead and email signature)
- One-page website or existing refresh
- Essential Document Templates (GP letters, basic consent and privacy form, communication templates)

Includes cost of website hosting for 12 months

Investment: \$3100

TOTAL PRACTICE TAKEOFF

An all-inclusive, done-for-you experience for busy professionals who want a high-quality setup from the ground up.

This includes:

- **Everything in Streamline and Soar**
- Full Branding Suite (Basic + Colours, Brand Guidelines, Social Media Templates) with 3 rounds of revisions
- Business Card Template
- Full 5-page website (Home, About, Services, Fees, Contact)
- Website copywriting or content review
- SEO setup (Google Business Profile, basic keywords)
- Google Business Profile Setup
- Three months of post-launch support

Investment: \$5000

Your Investment

Practice Management System Setup Packages

THE FRESH START

No existing setup? No problem. We'll build your practice management system from the ground up with processes tailored to how you work.

This includes:

- Input fees and services with relevant billing codes
- Add funders and referral types
- Automate payments, invoices, rebates, and reminders
- Calendar setup (locations, availability, appointment times)
- Custom invoice header
- User accounts for all practitioners
- Letter templates that auto-populate referrer/client info
- Online intake and consent forms
- Communication templates
- Medicare rebate processing
- Telehealth integration
- Online bookings
- 1-hr training session via video chat

Investment: \$650

THE FINE-TUNE

Already using Halaxy or Zanda but know it could be working harder? We'll review and refine your existing setup to optimise workflows and unlock features you may be missing.

This includes:

- Review billing codes and services
- Automation setup for payments, rebates, reminders
- Invoice header and letter template customisation
- Confirm online forms are working properly
- Setup/refine communication templates
- Telehealth integration
- Online booking setup or review

Investment: \$450

Both options include a link to a series of short videos of your system, showing how to use each feature that has been updated, as well as a step-by-step user guide for you to refer to in the future.

Ongoing Admin



For practices needing efficient, ongoing admin without needing to hire someone full time.

This service is for clinicians who want consistent, professional support with the day-to-day running of their private practice. No drama, no fluff, just help that makes a difference.

You don't need to hire someone full-time to get real, high-quality support. Work with us to get a flexible, experienced VA who already knows how private practice works and how to keep it running.

We offer fortnightly packages, or can work on an hourly rate. No lock-in contracts.

Your Investment

Fortnightly Support Packages

STARTER

Up to 5 hours of support per fortnight.

This will typically get you:

- Setting up new clients, sending out intake form and inputting funding and referral details
- Processing rebates, third party invoicing
- Following up outstanding accounts
- Data entry / maintaining current client information on your software

Investment: \$310

STANDARD

Up to 8 hours of support per fortnight.

This will typically get you:

- **Everything in Starter**
- Monitoring reception/admin email and responding to client enquires (for a client base of roughly 30 clients)
- Assistance with GP letters (drafting, proof reading, sending).

Investment: \$480

EXTRA

Up to 10 hours of support per fortnight.

This will typically get you:

- **Everything in Standard**
- Monitoring reception/admin email and responding to client enquires (for a client base of 30+ clients)
- Managing waitlist
- Reconciling payments and expenses in your accounting software

Investment: \$580

**Please note, any additional hours accrued in the fortnight will be charged at \$65 per hour on all packages.*

*** These are examples of tasks you may need assistance with but are not limited to these specific types of assistance.*

Don't need help on a permanent basis?

Our standard rate is \$65 an hour for all projects, no minimum spend.

Bookkeeping



Simple, reliable monthly bookkeeping using Xero or QuickBooks.

As a solo or small business, it's easy to get stuck in the weeds. Chasing payments, reconciling transactions, or trying to make Xero behave. Bookkeeping isn't always hard, but it's time consuming and easy to make mistakes when you're busy doing the thing you got into business to do in the first place!

Let's take it off your plate completely. With options for monthly bookkeeping services or just occasional help by the hour, your finances will stay clean, up to date, and compliant without you having to think about it.

We offer tiered monthly package options or an hourly rate.

Your Investment

Monthly Bookkeeping Packages

THE BASICS

Perfect for sole traders just starting out or running a lean setup.

This includes:

- Up to 60 transactions per month
- 1 bank account
- Bank reconciliation
- Quarterly BAS lodgement
- Match invoices to customer payments
- Email and phone support

Investment: \$65

THE STEADY FLOW

For growing businesses with a consistent stream of client activity.

This includes:

- Up to 120 transactions per month
- Up to 2 bank accounts
- Bank reconciliation
- Quarterly BAS lodgement
- Match invoices to customer payments
- Email and phone support

Investment: \$120

THE FULL BALANCE

For established businesses needing full support and visibility.

This includes:

- Up to 250 transactions per month
- Up to 4 bank accounts
- Bank reconciliation
- Quarterly BAS lodgement
- Match invoices to customer payments
- Priority email and phone support

Investment: \$180

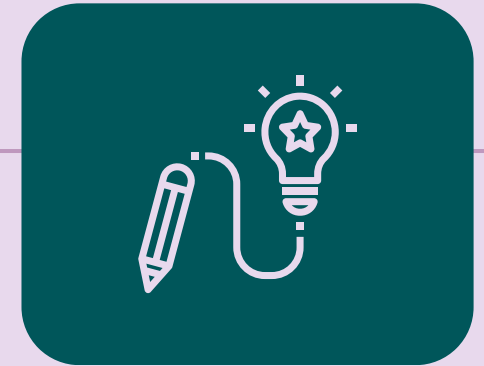
**All monthly packages are automatically charged via direct debit using Stripe.*

Need a custom solution or a one-time clean up?

We also work on an hourly rate of \$65, no minimum spend.

Design & Digital

// THE DETAILS



Professional, purposeful design to elevate your private practice.

You don't need to be on Canva at midnight or wrangling Word docs that won't behave. Whether you're creating referral flyers, building a course, or sending client forms, I can design branded, functional materials that reflect your practice and save you time.

This service is for clinicians who need clear, on-brand content — and don't have the time (or interest) to DIY. We offer a range of different services at an affordable hourly rate.

What We Can Design

Designs are including, but not limited to the below

MARKETING MATERIALS

- GP and referrer flyers
- Business cards
- Practice brochures or one-pagers
- PDF handouts or fact sheets

CLIENT DOCUMENTS

- Branded intake and consent forms
- Branded letterheads
- Worksheets, templates, and onboarding packs

SOCIAL & WEB ASSETS

- Social Media post templates
- Highlight covers, social story templates
- Website visuals and graphics

ONLINE COURSE SETUP

- Setup of landing pages, checkout and automation (Kajabi, Teachable, Thinkific)
- Integrate video, audio, lead magnets

WORKSHOP COLLATERAL

- Branded workbooks
- Powerpoint Presentations
- Lead magnet downloads
- Take-home info packs

YOUR INVESTMENT

Design work is charged at \$65/hour, with no minimum spend. You'll only pay for the time it actually takes to bring your ideas to life.

Looking for a full logo and brand identity package?

Head over to [Charlie Kidd Designs](#) for support with logo design, brand strategy and visual identity development.

What's Next?

Step 1: Chat & Choose

You enquire, we chat about your practice and what support you're looking for.

Step 2: Plan & Prepare

We map out your setup or support strategy, and gather all the information we need to succeed.

Step 3: Setup & Support

Work begins, systems are built, support kicks in. We'll keep you in the loop along the way.

Step 4: Launch or Maintain

You get the tools, guides, and training to confidently take the reins.

Testimonials



I run a private practice that also does consulting work. No two days or jobs are the same so I am often asking her to do things that are unfamiliar, poorly defined and time urgent. Charlie is that rare gem that can convert your vision into reality without fuss, she completes the tasks that are implied, but not specified because she sees what needs to be done and does it without waiting to be asked. She has a head for details and I trust her with the most confidential aspects of my business. I cannot recommend this service highly enough.

Melissa - Mindset Training



Charlie is phenomenal at what she does. She does things to a higher standard than I can and I'm frequently impressed with the quality in which the jobs and tasks are completed. Charlie also has exceptional organisation and initiative. She not only maintains various platforms (halaxy, quickbooks, gmail etc.), she often tinkers to optimise them too.

Jesse - Strength Psychology



Charlie has been such a saviour to both my private practice and my business coaching business. Her help has been invaluable and she's helped me come up with solutions that I didn't even know I needed. She has such a unique skill set that I've yet to find in another VA. She's been so flexible in our working arrangements and has been really understanding of my schedule and reply times as a mother of young kids herself.

Sheena - Savasana Collective



Working with Charlie has been an absolute game changer for me. She has helped me move forward in my business development at a time that I really needed it. Website, booking system, socials, marketing, online course creation, participant handouts, the works! Invaluable. Strongly recommend!

Kate - The Workplace Therapist

Get In Touch

Ready to work together? Contact us via any of the channels below and we will get in touch within 48 business hours.

Look forward to hearing from you!



charlie@thecliniciancompanion.com.au



[The Clinician Companion](#)



[@thecliniciancompanion](#)



thecliniciancompanion.com.au