

Clinic Setup Checklist

Follow these steps to go from a new account to a clinic that can schedule patients, document sessions, and collect payments.

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Phase 1 — Account & clinic profile

1. Create your clinic account

Start the free trial at <https://physioline.com/en/erp> Register as a clinic owner, verify email, and sign in.

2. Complete the clinic setup wizard

Clinic name, address, phone, logo, default language (Arabic/English), and working hours per branch.

3. Choose your PT specialties

Enable the specialties you treat (orthopedic, pediatric, neuro, sports, etc.) so assessments and clinical GPS adapt automatically.

Phase 2 — Team & access

4. Add therapists and front desk staff

Invite users and assign roles: Management, Front Desk, Clinical. Free plan: up to 2 staff; Professional: up to 8; Enterprise: unlimited.

5. Configure permissions

Confirm who can view billing, edit clinical notes, manage schedules, and export reports.

Phase 3 — Patients & scheduling

6. Import or add patients

Use CSV import for bulk patients, or add manually from the patient list. Include phone numbers for reminders.

7. Set up services and session duration

Define visit types, default durations, and therapist availability on the calendar.

8. Test the front-office flow

Book an appointment → add to waitlist → check in → hand off to clinical queue. Confirm the therapist sees the patient in their workspace.

9. Configure reminders (Professional+)

Enable WhatsApp and/or SMS templates for appointment confirmations and no-show reduction. Email reminders available on paid plans.

Phase 4 — Clinical documentation

10. Open an episode of care

Create an episode for a test patient, select specialty, and run the initial assessment form.

11. Document a session

Complete a SOAP note, attach outcome measures if needed, and save. Verify encryption and therapist-only access.

12. Build a weekly treatment program

Assign structured weekly sessions (not random bookings) and confirm auto-scheduling if enabled.

Phase 5 — Billing & payments

13. Configure pricing and packages

Set service prices, session packages, and dynamic pricing rules (specialty × level × location if used).

14. Connect Paymob (paid plans)

Subscribe to Professional or Enterprise, then test a patient invoice and card/wallet payment.

15. Test insurance workflow (if applicable)

Add patient insurance card, contract, and generate a claim pack for manual submission — Egypt-first workflow.

16. Run a end-to-end revenue test

Schedule → complete session → generate invoice → record payment → verify report totals.

Phase 6 — Desktop (optional)

17. Choose SaaS + desktop or one-time license

Paid Professional/Enterprise includes desktop download access, OR buy a one-time Standard/Premium desktop license separately.

18. Install and book onboarding

Download the Windows/macOS installer, install on the clinic PC, and book your Zoom onboarding session with our team.

Go-live checklist

- ☐ All active therapists can log in and see their schedule
- ☐ Reception can book, check in, and print/email invoices
- ☐ WhatsApp/SMS test message received on a real patient number
- ☐ At least one real episode documented with discharge-ready notes
- ☐ Manager can open daily/weekly revenue report
- ☐ Backup and support contact saved

Need help? Visit the Help Center at <https://phyzioline.com/en/help> or book a demo from the ERP site.