



## **PODIATRY PRACTICE MANAGEMENT SYSTEM**

### **(PRIVATE PRACTITIONERS)**

### **VERSION 8**

### **INTRODUCTORY MANUAL**

Thank you for taking the time to look at the Tynedale Podiatry Practice Management system. This manual is designed to give you a quick overview of the system covering the following areas:

- Basic introduction to computer terminology
- Installing the software
- Locating and creating patient records
- Recording treatments
- Printing letters
- Creating recalls
- Booking appointments.

If you have any queries or experience any problems using this system please telephone our help desk on 0191 5494400



## **GETTING STARTED**

The Podiatry Practice Management system (PPMS) has been designed to suit a range of podiatrists, starting with those who simply wish to record basic patient information such as name and address. However, for podiatrists who wish to enter more detailed information, or organise their correspondence and accounts, the system allows them to record a large amount of additional information and to manipulate it to produce reports and statistics.

## **THE MANUALS**

We have prepared three manuals to support the system. These are:

- Introductory Manual. This manual.
- User Manual. The User Manual describes all the basic features of the system, as well as explaining how to set the system up on your computer. It also describes how to use the basic accounting features and how to send letters and e-mails to patients.
- Advanced Manual. The Advanced Manual describes how to create further reports from the information already entered and how to make more use of the accounting information held against each patient. It also explores the other options that are available on the system, such as how to define new treatment options, and how to connect to a laptop computer.

## **INSTALLING PODIATRY PRACTICE MANAGEMENT**

If you already have an old version of our 30-day trial installed on your computer you will need to remove this before installing version 7. You can do this using the Add/Remove programme icon in the control panel or by deleting the PPMS folder using Windows Explorer or My Computer.

When you insert the CD into the drive, the setup programme should run automatically. If it does not, you will need to run the SETUP.EXE file from Windows Explorer. Follow the installation instructions on the screen. When the software is installed you will return back to your desktop with a new icon in the shape of a foot called 'Podiatry Practice Management'.

Double click on the foot icon to load the Podiatry software. You maybe prompted for your user name and serial number. The serial number is C7RSI 446967 12365.

### **Selecting the data file**

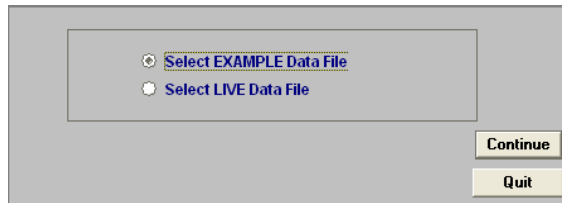
The software comes with two data files:

- An example data file that includes a few patient records, treatments and appointment diaries. Use this to try out the system before entering live data. (You can enter your own patients on the sample data file but the information will be lost if you decide to purchase the software)

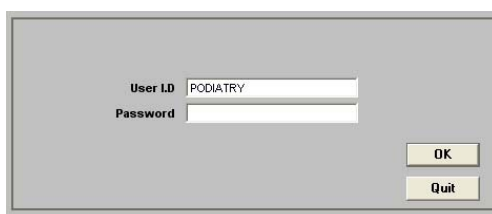
## PPMS INTRODUCTORY MANUAL

- The 'live' data file which is empty but includes quick setup routines for setting up your clinics and appointment diaries. Use this data file after you have assessed the system and want to use it live with your own patient records.

So for now, you want to use the example data file. On the popup screen below which should be on your computer, click on Example Data and then click **Continue**.



The screen changes to the following.



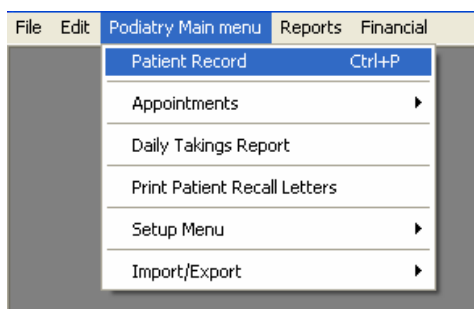
In the *User ID* type in PODIATRY and leave the password blank. Click left on the **Ok** button. If you decide to purchase the software you can create your own User ID's for each member of staff at your practice.

There is no time limit for this example software, but you are limited to a maximum on 25 patient records.

## **THE PATIENT RECORD CARD**

The system now displays a blank screen with the menu titles at the top.

To begin with we will take a look at the Patient Record screen. Click on the Podiatry Main menu, move the cursor down until "Patient Record" is highlighted and click again. Alternatively press CTRL + P.



The screen now changes to bring up the blank Patient Record screen as below.

The screenshot displays a comprehensive patient record form. At the top, it includes fields for Record No., Alternative No., Date of Birth, Age, and Sex. Below these are fields for Title, Surname, and First Name(s). The Address section consists of three stacked text boxes. To the right, there are several dropdown menus for Podiatrist, Registered Clinic, Occupation, Referral, Registered GP Practice, GP, Patient Category, and Category 2. Other fields include Post Code, Telephone, Email Address (with a Send Email button), Weight (Kgs), Height, Insurance Ref, Allergies, Comments or GP Info, and Account Balance £. At the bottom, there are fields for Next Appointment, Date of Referral, First Treated, Last Treated, App Due, and Died. A toolbar at the very bottom contains buttons for Add Patient, Edit, Find, Find / List, Next, Back, Delete, Quit, Ok, Treatments, Appointment History, View Scanned Images, Letters History, Print, >Page>, and Cancel.

**Creating a new record**

Click left on the **Add Patient** button at the foot of the Patient Record screen to start to create a new record.

Very little information must be entered for a patient; it is up to you to decide how much you wish to enter.

The system allocates the Record No. automatically starting from 00001, so the cursor skips the first field and is positioned in the *Alternative No* field.

Use either the mouse, or the TAB and SHIFT + TAB keys, to move the cursor to the three obligatory fields – *Date of Birth*, *Sex* and *Surname* – and enter the patient’s particulars. If you do not know the date of birth, it can be left as today’s date and changed later.

Now move around the other fields and enter as much or as little as you wish. The main ones used are: *Title*, *First Names*, *Address*, *Post Code* and *Podiatrist*.

There are eight fields (*Podiatrist* to *Category 2*) at the right of the screen whose entries are selected from a popup menu. Left click in the field to obtain the list of possible entries, and left click again on your choice. If the list is long, you will have to scroll down through the list to find your choice.

**Entering information**

Information is entered into the fields of a screen in a similar way to that in any other Windows based software. For those new to computers, here are a few pointers.

## PPMS INTRODUCTORY MANUAL

Before entering any information, check that the cursor is in the required field. If it is not, move to the field using the TAB key, or position the cursor in the field and left click. SHIFT + TAB moves to the previous field.

### Typing into fields

When the cursor is in the required field, enter information simply by using the keyboard. When you have completed a field, press the TAB key to move to the next field. Do not use the RETURN key. If you accidentally press RETURN click on *Edit* to continue entering data.

If you make any errors, use the backspace key to correct them. Or, highlight the error using one of the following three methods, and then type in the correct information which will replace the error.

- Use the arrow keys or the mouse to place the cursor at one end of the error, hold down the SHIFT key and move the cursor to the other end using the arrow keys.
- Use the mouse to place the cursor at one end of the error, hold down the SHIFT key, use the mouse to move the cursor to the other end of the error and left click.
- Use the mouse to place the cursor at one end of the error, hold down the left button of the mouse and drag the mouse to move the cursor to the other end of the error.

### Validation of contents

If you try to move the cursor from a field and the computer beeps, it means one of two things:

- The information entered is not valid for that field. For example, in one field you enter the patient's sex. Valid characters here are M and F. If you enter Y, the computer will beep and not let you past that field until you either click on the *Cancel* button or enter M or F.
- No information has been entered, but the system requires that the field is completed. For instance, Reference Codes and often Descriptions cannot be left blank.

In either case, you will need to change the entry in the field. Examples of acceptable entries are often shown to the right of the field. Also, when the mouse cursor is in the field, guidelines for the format of that field may be given on the bottom line of the screen.

### Changing the contents of an existing field

If you use the TAB key to reach a field which has already been completed, the contents will be highlighted (selected). Typing anything now will delete the contents, unless you move the cursor with the right arrow first.

However, if you use the mouse to reach a field which has already been completed, the contents will not be highlighted, and anything typed will be added to the field, unless you highlight the field first.

## Saving the Record

When you have finished registering the patient, click on the **Ok** button to save the record. The patient's record will be allocated a number and saved on your computer.

## Finding a record

To find a patient record you will need to click on the **Find** button. The cursor will then move to the *Record No* field. Type in **00001** and then click on the **Ok** button. (Press the RETURN key if you prefer).

This opens the Patient Record screen for patient number 00001, Mrs Fletcher.

The screenshot shows a patient record form for Mrs Jane Fletcher. Key details include:

- Record No:** 00001 (Alternative No. field is empty)
- Date of Birth:** 28 FEB 1966 (Age: 36, Sex: F)
- Title:** Mrs
- Surname:** Fletcher (First Name(s): Jane)
- Address:** 23 ALSTON DRIVE, SUNDERLAND
- Post Code:** SR12 5BB
- Telephone:** 0191 234333
- Email Address:** JANE.FLETCHER@TCS.COM (Send Email button)
- Weight:** (Kgs) | **Height:** (cm)
- Insurance Ref:** | **Allergies:**
- Comments or GP Info:** (Text area)
- Account Balance:** £ 0.00 (Account Card button)
- Next Appointment:** (Date and Time field)
- Date of Referral:** 14 APR 1999 | **First Treated:** 27 MAR 2001 | **Last Treated:** 1 JUN 2002
- Podiatrist:** JOHN PATTERSON | **Registered Clinic:** HEALTHY FEET CLINIC - ROOM 1
- Occupation:** SHOP | **Referral:** SELF
- Registered GP Practice:** BRIDGE ROAD MEDICAL CENTRE | **GP:** BROWN, P
- Patient Category:** HIGH RISK CHIROPODY | **Category 2:** HIP PATHOLOGY (Previous Medical History button)

Navigation buttons at the bottom include: Add Patient, Edit, Find, Find / List, Next, Back, Delete, Quit, Ok, Treatments, Appointment History, View Scanned Images, Letters History, Print, >Page, and Cancel.

Footer text: Move back to the previous record in alphabetical order.

In this screen you can see that we have entered a clinic and podiatrist. This would normally be done if you work from several locations and have several podiatrists working with you. However, the Clinic names could just as easily have been setup as the Podiatrists name if that is what you prefer. The GP practice and GP codes can be entered allowing you to produce GP letters or reports.

If you have mistyped the record number click on **Find** and try again. You can also search in the fields *Surname*, *Alternative No.*, *Address*, *Post Code* and *Telephone number*. However you can only search on one of these fields at a time.

After you have selected a record using the **Find** button, you can use the **Next** button to find the next record in sequence. Normally this is in alphabetic order of the surname, but if you use the **Find** button to search on another field, for instance the *Record No*, clicking on the **Next** button will take you to the next record in numerical order. In the same way, the **Back** button will take you back through the records in alphabetical order.

Often the preferred method for finding patients is using the **Find/List** button. This allows you to search on several fields at a time and will display a list of all the patients that match your criteria. After locating the patient in the list, double click on their name and the full record will be displayed.

**Amending a record**

You are likely to want to change or add to the information in a record at some point after you have saved it. To do this, first search for the record to be changed using the ***Find*** or ***Find/List*** buttons as above.

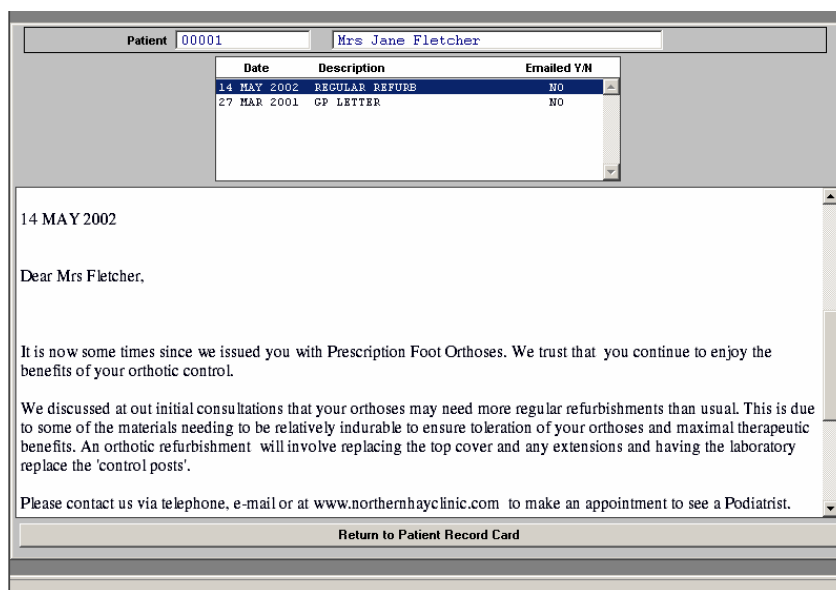
Then click on the ***Edit*** button, which allows you to change or add to your entries in the fields. Make your changes in the same way as you would enter them when creating a record.

Finally, click on the ***Ok*** button to save your changes, or the ***Cancel*** button to discard them. If you click on the ***Ok*** button, the screen reverts to the Patient Record screen that you were editing. If you click on the ***Cancel*** button, the screen will revert to a blank Patient Record screen.

**Letters history**

This provides an audit of all letters/emails which have been sent either to the patient or to their GP.

When you click on the ***Letters History*** button on Mrs Fletcher’s Patient Record screen the following screen is displayed.



A list of all the letters that have been sent to the patient or their GP is displayed in the scroll box at the top of the screen. Clicking on any letter in the scroll box will display the contents of the letter in the box below.

In this example, two letters have been created for Mrs Fletcher. The first on the 27 March 2001 informing her GP that she is being treated. The second on the 14 May 2001 is a recall for an orthotic refurbishment.

Click on the ***Return to Patient Record Card*** button to return Mrs Fletcher’s Patient Record screen.

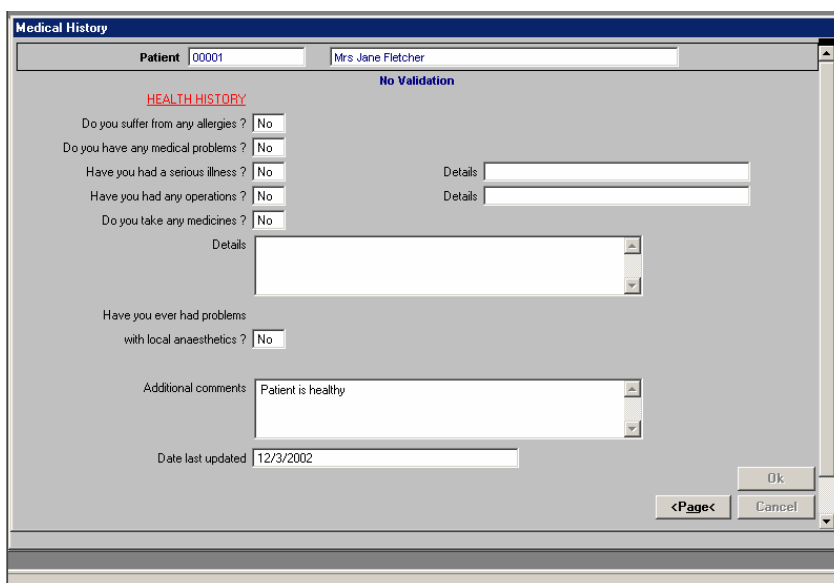


**Previous Medical History**

This button is used to enter details of the patient’s past medical history. This can be entered either as free text or you can use the drop down lists to select standard descriptions for conditions and medication. If you choose this latter method you can use the Report menu to analyse the patient database.

**>Page>**

You can set up your own contents and format of the second page of the Patient Record screen. We have included an example to demonstrate what is possible. To move to our example page 2 click on the **>Page>** button.



This could be used to record a medical questionnaire that you may give to your patient when they are first assessed. You can define this screen yourself to match your own documentation. You can also highlight key questions so that a warning message will be displayed on page one of the patient record if the patient has any allergies or medical problems. This will prompt you to check this page before treating the patient.

Now click on the **<Page<** button to take you back to the first page.

**Other functions**

Functions available by clicking on other buttons on the Patient Record screen include:

- **Treatments**                      Record and view and treatment details
- **Appointment History**        Print a report to the screen showing which appointments were attended, cancelled or not attended
- **View Scanned Images**        Any correspondence from the patient or GP can be scanned and the images stored with the patient record
- **Print**                                Print patient record and treatment details
- **Send Email**                        Send a quick note to the patient using e-mail.

## PATIENT TREATMENTS

The podiatry system provides three ways to record patient treatments. These range from recording that the patient has attended to entering complete treatment records. Two methods are via the **Treatment** button on the Patient Record screen, the third is from the appointments system.

To access the treatment history screen, select the **Treatment** button on the Patient Record screen. The view below shows the treatment history screen for Mrs Fletcher.

The screenshot displays the following information:

- Patient:** 00001, Mrs Jane Fletcher
- Patient Recalls:** A table with columns for Description, Date, and No. Below the table are 'Add Recall' and 'Remove Recall' buttons.
- Patient Treatment History:**
  - At location(s): Dorsal Left 5th Proximal Interphalangeal joint. On examination found: Hard corn. Activity included: Remove corn.
  - At location(s): Right Lateral 2nd Plantar Metatarsal/Phalangeal J, Right Lateral 3rd Plantar Metatarsal/Phalangeal J, Right Lateral 4th Plantar Metatarsal/Phalangeal Jo, Left Lateral 2nd Plantar Metatarsal/Phalangeal Joi, Left Lateral 3rd Plantar Metatarsal/Phalangeal Joi, Left Lateral 4th Plantar Metatarsal/Phalangeal Joi. On examination found: Callous. Activity included: Debrided / cleared with scapel, Pre and Post op 2.5% Chlor Gluc spray.
- 10 MAY 2002:** Clinical Assessments: BIOMECHANICAL EXAMINATION
- Record will be locked 7 day(s) after treatment was inserted. Rec No. 2902**
- Buttons:** Add Detailed Treatment, Add Basic Treatment, Amend Treatment for 10 MAY 2002, Print, Delete Treatment, Print Letter, Quit to Patient Record

This screen displays a full treatment history including treatment notes and patient comments. If you scroll through the list for Mrs Fletcher you will see that recent treatments include a Biomechanic examination on 10/5/2002 and chiropody on 2/4/2002 and 19/2/2002.

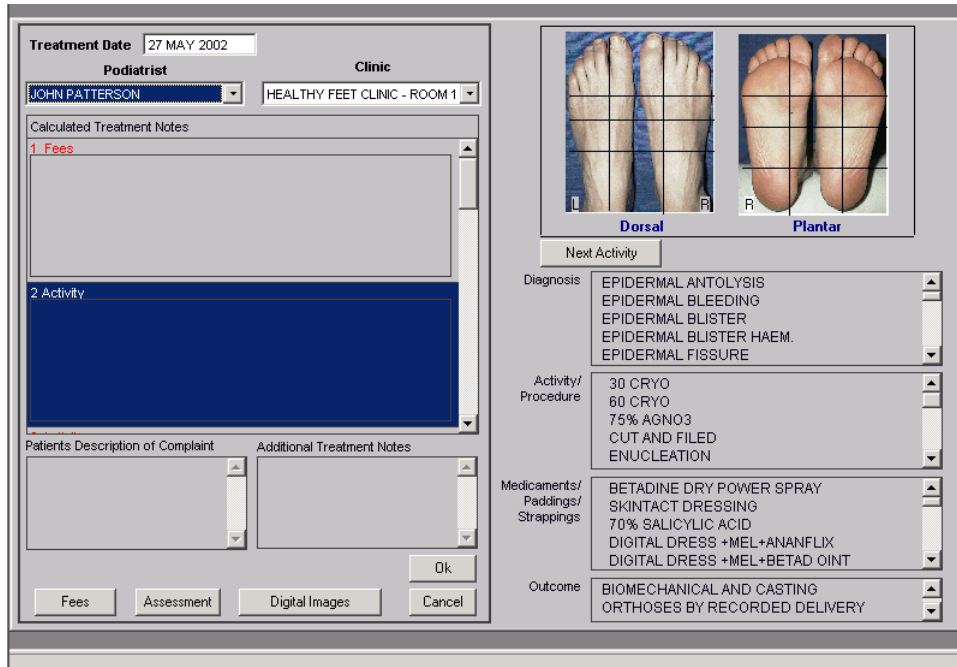
### Detailed and Basic Treatments

There are two methods of recording treatments on the treatment history screen. There is a detailed treatment screen that includes dorsal and plantar diagrams, feet anatomy and automatic treatment notes. However, for customers who like to keep things simple, at Version 7 of the Podiatry system we have added a simplified treatment screen for just entering treatment notes. These notes can be entered either via the keyboard or using 'ViaVoice Pro' voice recognition software.

**All treatments are locked after a set number of days. Once a treatment is locked it cannot be amended. If you record all your treatment notes on the computer it is important that you can prove that your records were not altered at a later date. Some other systems don't lock the treatment but only register the date it was last amended. Since the system date can easily be changed on the computer this, in our opinion, does not prove that the record has not been tampered with. Because this system locks the record you can prove it hasn't been changed.**

**Detailed Treatments**

We will start by looking at the detailed treatment screen. To begin, click on the *Add Detailed Treatment* button.

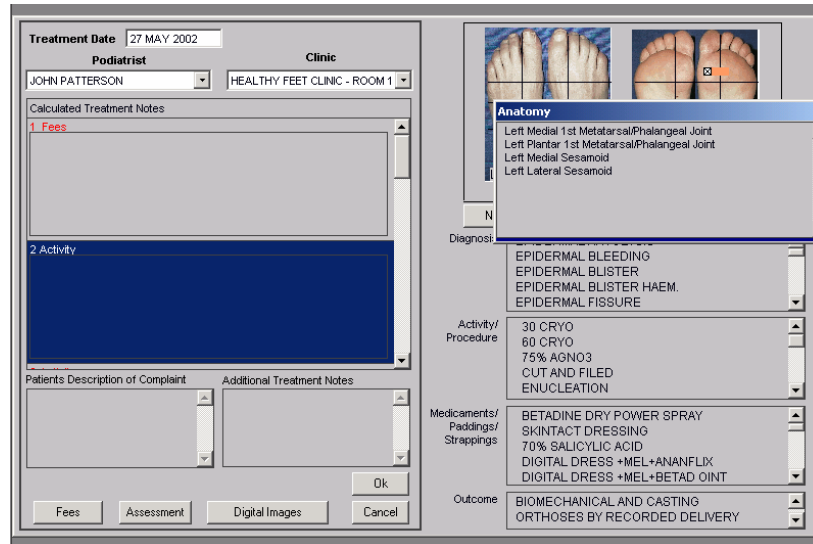


This version of the treatment screen displays pictures of the Dorsal and Plantar diagrams on the right hand side, as well as lists of Diagnosis, Activity, Medicaments and Outcomes. The system includes examples but you can set up your own codes if you prefer.

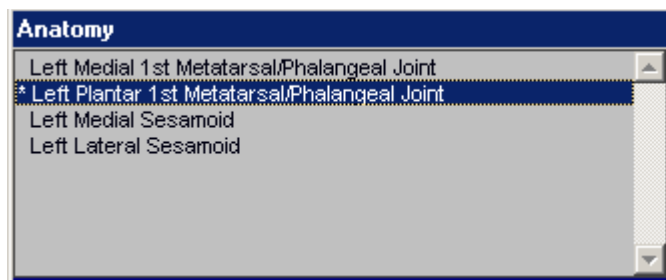
On the left of the screen there are boxes displaying your calculated treatment notes as well as patient comments and any additional treatment notes you wish to type in.

Location on view of foot

To begin, click on the left medial first metatarsal joint as shown below, to identify the location of the problem.

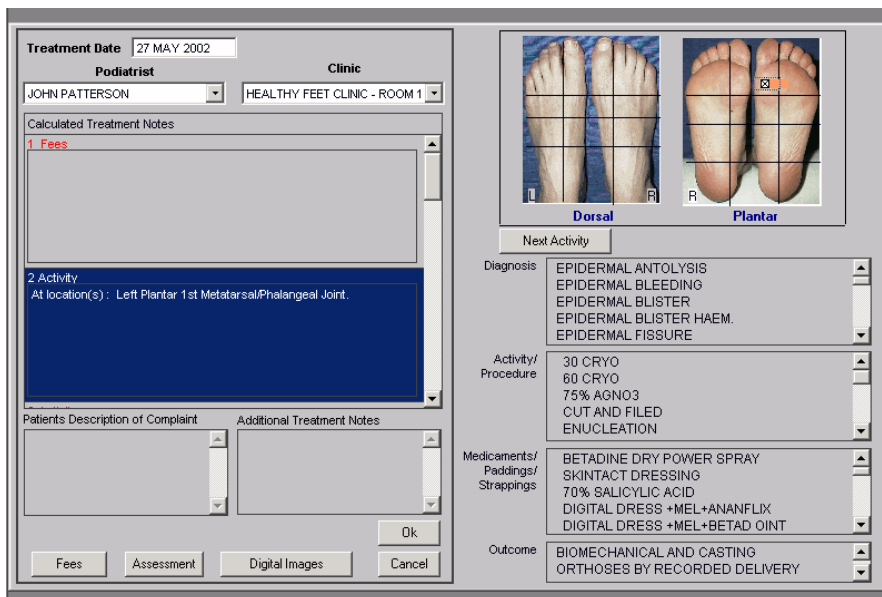


A box will appear showing the anatomy for the selected part of the foot. Again, you can amend these descriptions if you prefer. You can now select a location (or several) by clicking in the anatomy box.

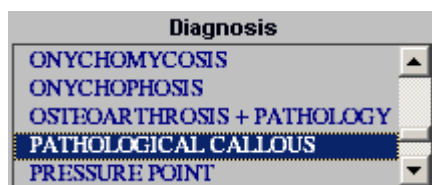


When you move the mouse away from the anatomy box, the box disappears and the description appears on the left of the screen.

Entering a diagnosis

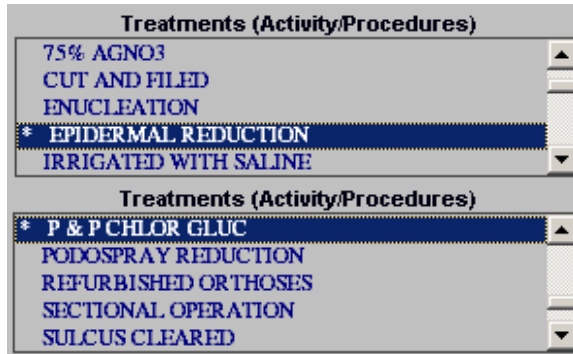


You can continue by selecting a diagnosis. Click left in the scroll bar at the right of the *Diagnosis* box to scroll down through the options until Pathological Callous is highlighted.



Move the cursor to the *Activity/Procedure* box where you can select up to 7 treatments for each diagnosis. Click once to select an item in the list. Click on it again to remove it. (If it is already highlighted you may need to double click to remove it.)

Select Epidermal Reduction and then P & P Chlor gluc.



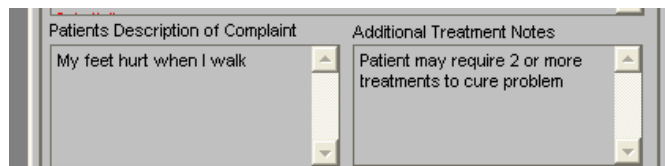
You could also select any medicaments/paddings used as part of your treatment as well as an outcome.

On the left of the page you will see that the system is automatically creating treatment notes based on the treatment details you have selected. The standard text for each treatment can be amended so that you can set up the system with your own treatment phrases.

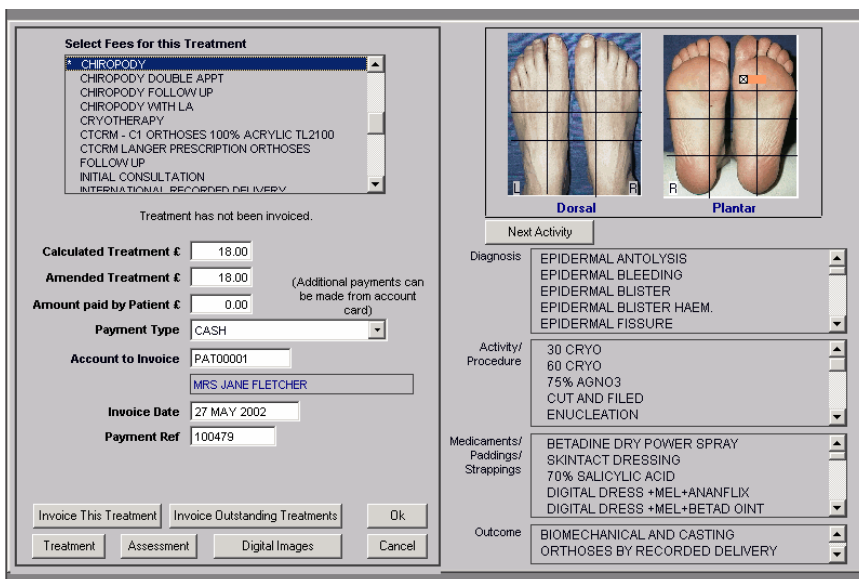
If there are more details to record for this treatment click on the *Next Activity* button and then select the next anatomy location and diagnosis.

Patient’s description of complaint

You can enter free text in the *Patient’s description* and the *Additional Treatment Notes* boxes.



Fees button



Clicking on the **Fees** button replaces the left half of the screen with fees and invoicing options. In the above example, Chiropody has been selected with a standard price of £18.

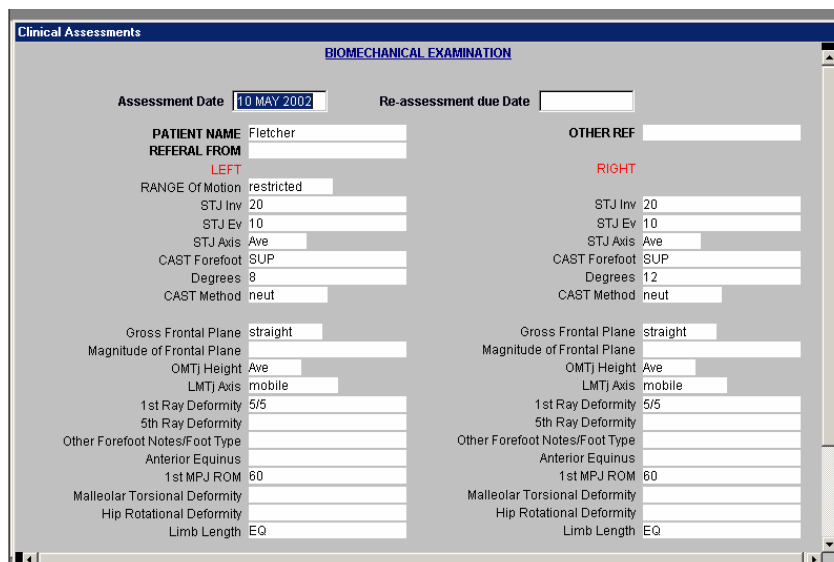
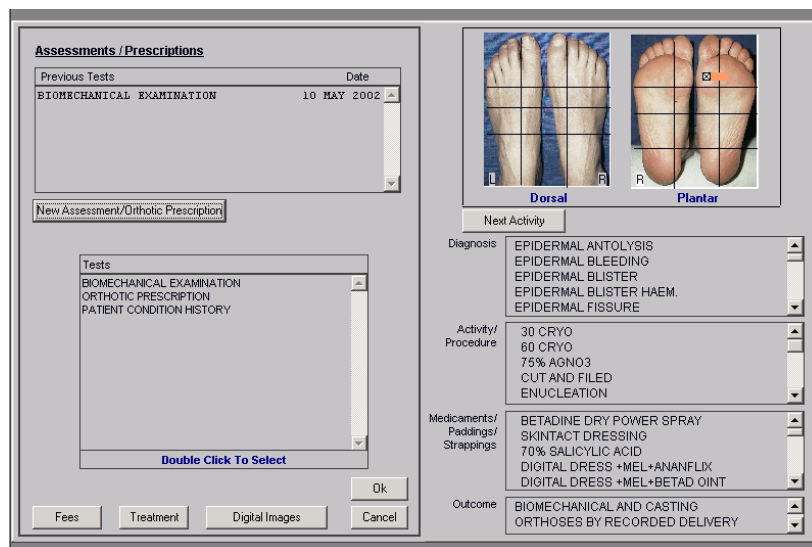
The Podiatry system allows you to define treatment prices from which you can select up to 7 per treatment. The system calculates the total treatment charge but allows you to amend it if discounts are to be given to the patient. You can also enter how much the patient has paid.

There are two buttons for printing out Invoices or Receipts. The **Invoice This Treatment** button will print out an invoice for the patient and it will also update the customer’s sales ledger with the invoice and payment details. If the patient or an insurance company is to be invoiced for the full course of treatments you can use the **Invoice Outstanding Treatments** instead, to produce one invoice for the full course of treatment.

Assessment

The assessment screen can be used to record assessments for new patients, e.g. Orthotic prescriptions, Biomechanic assessments etc. You can add as many different assessments as you need and all of them can be defined to match your existing paper records.

The box at the top half of the screen shows the history of all the assessments this patient has received. You can see the details of any item by double clicking on that item in the list. To add a new assessment click on the *New Assessment/Orthotic Prescription* button and a new box will be displayed underneath. This displays a list of the different assessment/prescriptions available on the system. Double click in the list to enter an assessment for the patient.



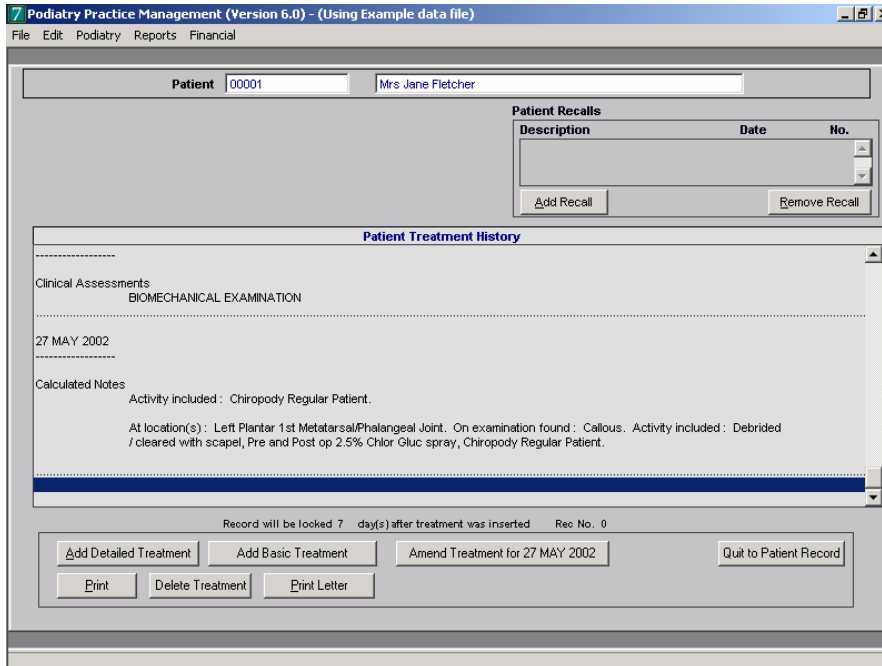
Scroll to the foot of the screen, and click on the **OK** button to return to the assessments page.

# PPMS INTRODUCTORY MANUAL

## Digital Images

The **Digital Images** button allows you to record up to 6 JPEG images from a digital camera against each treatment.

From the digital images screen, click on the **OK** button to return to the detailed treatment screen. When you are finished here, click on the **Ok** button to save the record and return to the treatment history screen.



Mrs Fletcher's treatment history screen now includes the treatment details you have just entered.

### Add Basic Treatment

If you prefer not to use the menus of the detailed treatment screen, this second option has been added for recording basic treatment notes.

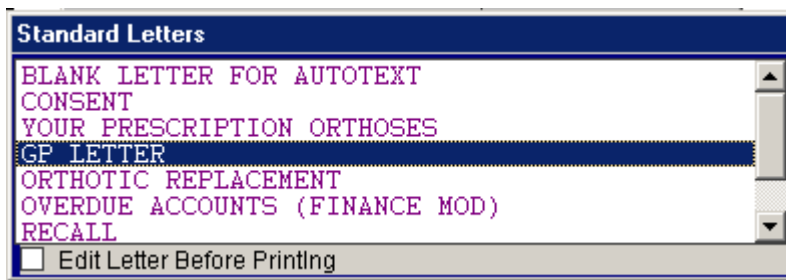
On the treatment history screen, click on the *Add Basic Treatment* button to open the screen below.

The screenshot shows a software window titled "Add Basic Treatment". On the left side, there are three input fields: "Treatment Date" with the value "24 FEB 2003", "Podiatrist" with a dropdown menu showing "JOHN PATTERSON", and "Clinic" with a dropdown menu showing "HEALTHY FEET CLINIC - ROOM 1". Below these fields are five buttons: "Fees", "Assessment", "Digital Images", "Ok", and "Cancel". On the right side, there are two text areas: "Patient Comments" at the top and "Treatment Notes" below it. The "Treatment Notes" area is significantly larger than the "Patient Comments" area.

The right half of the screen is for typing in your treatment notes (or you can dictate notes using Via Voice). The left half contains the same buttons for *Fees*, *Assessments* and *Digital Images* as the detailed treatment screen, and they operate in the same way as on that screen.

### Print Letter

The **Print Letter** button on the treatment history screen can be used to send a letter to the patient's GP informing them about their course of treatment.



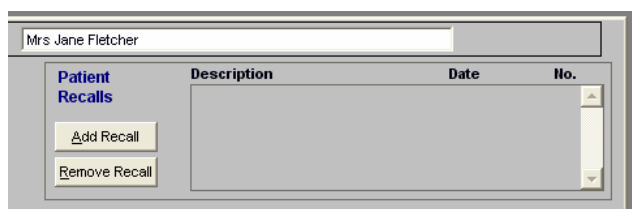
Click on the list to select one of the standard letters provided. Click the *Edit Letter before printing* check box to amend the letter before it is printed. When the letter has been printed it will be added to the patient Letter History audit trail. Click on **Ok** to return to the treatment history screen.

You can amend the letters in the list or add your own. These letters can include patient field names so that the system will automatically fill in the patient's name and address.

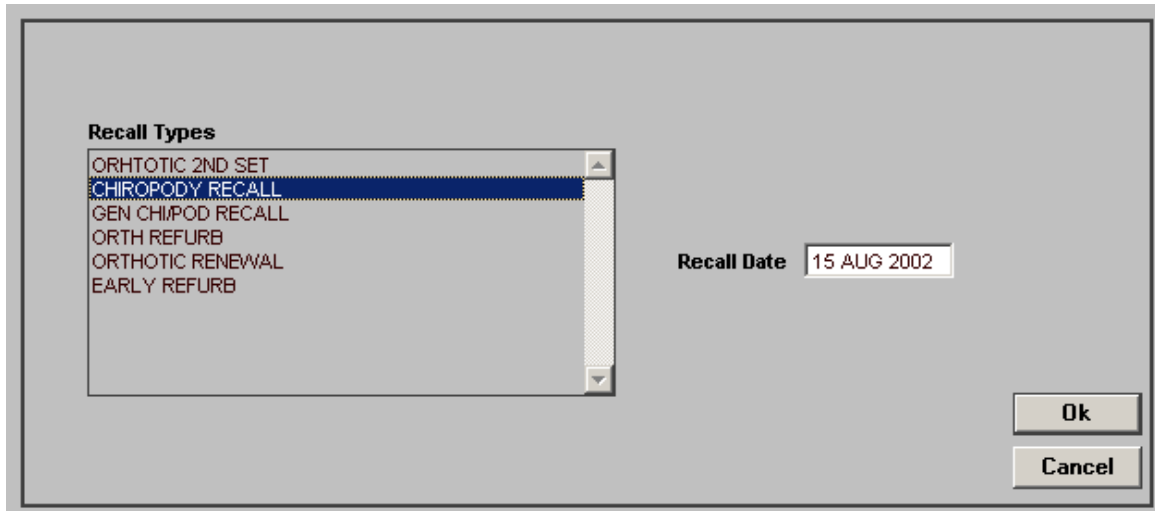
In addition to this you can also set up your letters using Microsoft Word. The presentation of Word documents are usually a lot better as it allows you to set up different fonts and styles which are not available using Standard Letters. The PPMS software will automatically load Word, print out the document and then close Word when the printing is complete.

### Recalls

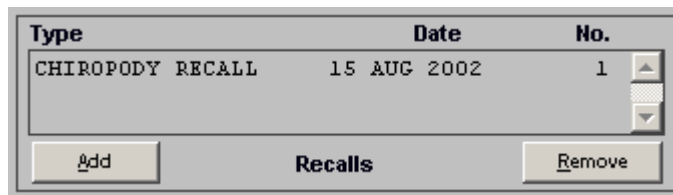
There is a Patient Recalls section at the top right of the treatment history screen.



After treating the patient, you may decide to set up a recall to remind the patient to make an appointment or to have some orthotics checked. The patient can have several recalls at one time. To create a recall, click on the **Add Recall** button. A list of standard recall types is displayed.



Select the appropriate recall and amend the recall date if necessary. Click on **Ok** and the recall will be added for this patient.



There is a facility on the Podiatry Main menu to print out recalls due between selected dates. The system automatically selects the correct recall letter and fills in the patient address details.

To finish with the patient treatment facility and return to the Patient Record screen, click on the **Quit to Patient Record** button.

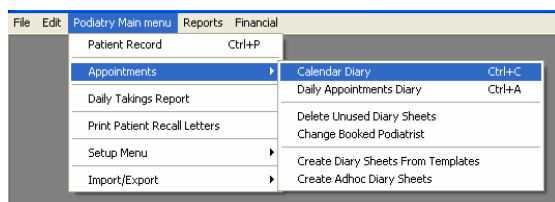
## APPOINTMENTS

The Podiatry system provides two ways to book appointments:

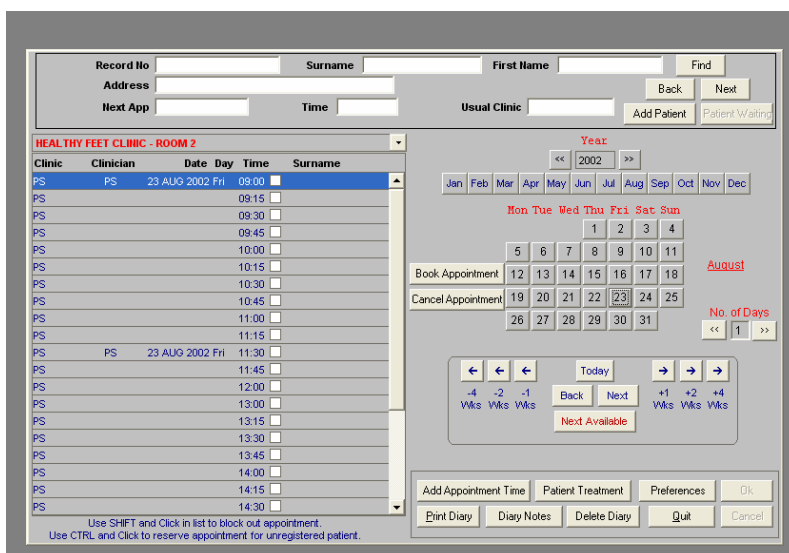
- Calendar Diary
- Daily Appointments Diary. (This shows one day at time)

### Calendar Diary

The preferred option for most podiatrists is the Calendar Diary which is available from the “Appointments” option on the Podiatry Main menu. Alternatively, press CTRL + C.



This opens the calendar diary as shown below.



The sample data file has diary sheets created until September 2005. If you are using the Sample data file, Click on *Today* and then click on *Next* (below it) to display tomorrows diary page.

The list on the left hand side of the screen displays the appointments for your selected day. If this list is empty it may be because you need to select a clinic first from the drop down list.

To change the day use the calendar on the right hand side of the screen, selecting the month and day.

The buttons below the calendar allow you to move forward and back days or weeks at a time. The *Next* button is used to display the next appointment diary. *Next Available* is used to locate the next appointment diary which is not fully booked.

### **Finding Patients**

The top part of the screen is used to select the patient. If you have come from the patient record there may already be a patient displayed. If not, use the *Find* button and enter the record number, surname or address and then click on the **OK** button.

### **Booking an Appointment**

To book an appointment, click on the *Book Appointment* button and then click on the required time.

If the patient needs two or more appointment slots, click on the time and then drag down to the next line in the list. This will book the appointment and allocate subsequent times to the same patient.

### **Cancelling an Appointment**

Click on the *Cancel Appointment* button and then click on the appointment time to remove the booking.

### **Adding Appointment Times**

If you want to double book an appointment or work late on a particular day you can use this button to add appointments. Enter the time of the appointment and it will then be added to the list.

### **Blocking out Appointment Times**

To block out an appointment, click on the appointment time whilst holding down the SHIFT key. This will prevent the appointment from being booked and enter the description 'Do not book'. If you hold down the CTRL key instead of SHIFT you can enter your own description.

To make the appointment available again use SHIFT and click again.

### **Preferences**

This button allows you to alter some of the parameters (e.g. colours) which affect how the screen looks. Also, you can alter the frequency in which the date appears in the lists. The default is for the date to appear after every 10 appointments. If this were changed to 1 the date would appear in every line. There is also an option which allows you to enter a short description when the appointment is booked. To activate this, change 'Allow Appointment Notes' to YES.

### **Print Diary**

Use the *Print Diary* button to print out the appointment diary for that day or week.

### **Patient Waiting**

The *Patient Waiting* button can be used to highlight patients that have arrived at the clinic and are waiting to see the podiatrist. Clicking on the patient's surname in the list will find the patient and display their details at the top of the screen. If you then click on the *Patient Waiting* button their surname will change colour. If the podiatrist has the diary sheet displayed on their computer in the surgery, this will be updated to show that the patient has arrived when they click on the *Today* button.

### **Patient Treatment**

This button can be used as a short cut to the patient's treatment screen. From here you can enter the treatment for the patient and then quit back to the Calendar Diary. If you do not want to enter treatment notes on the PPMS system, you can change the 'Treatment button' option on the preference screen. This can be altered so that the software will ask you if the patient has attended instead of displaying the treatment screen. If YES, the software will automatically create a treatment record and update the appointment history to say that they attended. This option would be used for podiatrists who want use PPMS to keep a record of treatment dates but want to continue to use paper records for recording treatments details.

We hope that this will have given you an overview of how the system works. There are many more facilities built into the system which have not been covered in this booklet. If you would like free copies of the User and Advanced manuals, please contact our help desk on 0191 4283341.

## **OUR DETAILS**

Tynedale Computer Systems  
38a Sea Road  
Fulwell  
Sunderland  
Telephone 0191 5494400  
Email [info@tynedalecomputers.com](mailto:info@tynedalecomputers.com)

---