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CHAPTER 1 – INTRODUCTION

THE PODIATRY PRACTICE MANAGEMENT SYSTEM

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.** The Introductory Manual should be read in conjunction with the Example data, to develop an understanding of the main aspects of the system.
- **User Manual (this 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.

USING THE PPM SYSTEM

Once you have used the Example data to investigate the main features of the system, you can create your own database with data of your own patients.

First, you have to enter some details about your practice – the names of the podiatrists, their clinic times, and the date of the start of your financial year. Chapter 2 of this manual explains how to do this.

Then you can start using the system to enter information about your own patients, as follows:

- Enter information about each patient (such as name, address and date of birth). See Chapter 3.
- Document the treatments given to each patient. See Chapter 4.
- Make and organise appointments. See Chapter 5.
- Set up a basic accounting system, which can calculate each patient's fees and give a report of daily takings. See Chapter 6.
- Organise standard correspondence and e-mails to create patient recall letters and other correspondence. See Chapter 7.
- Amend your list of podiatrists and their clinics and specify holidays; set up user groups; back up your data. See Chapter 8.

In general, each chapter starts with basic instructions for using the system, then continues with details of the various features and options of each function.

After this you can take advantage of the advanced features of the system if you wish. They are described in the Advanced Manual.

The rest of this chapter lists each menu with a brief description of the options. This is followed by an explanation of some of the standard computing terms used in this manual, with gives a brief description of how to enter data on the screen. Experienced computer users can skip from Page 1-7 to the end of the chapter.

ORGANISATION OF MENUS

The menus have been organised so that the key features are presented in a single menu (the Podiatry Main menu). The following tables list all the menus and their contents.

File menu

The File menu is used to install and control the software of the Podiatry system, to back up data and to select a printer.

Menu option	Function	Described in
Login	Allows a different user to log in without closing down the system	User Manual Chapter 8
Change Password	Increases security by enabling a change of password	User Manual Chapter 8
Quick Backup	Copies the data to the C drive	User Manual Chapter 8
Backup Data	Copies the data to a defined drive (eg zip or CD)	User Manual Chapter 8
Restore Backup	Restores the backed up data (use with caution)	User Manual Chapter 8
Printer Setup	A standard pop-up screen for selecting a printer and defining its properties	Windows manual
Upgrade Software	Used to install and activate the full Podiatry system. Also used to reset accounts	User Manual Chapter 2 and Chapter 8
About Podiatry Practice Management	Gives the version number of the Podiatry software and states copyright	None
Exit	Closes the Podiatry software	None

Edit menu

The Edit menu is a standard Windows feature. It is only used for some advanced functions when the Podiatry system is used in conjunction with other Windows based software.

Podiatry Main menu

This menu provides all the basic functions of the system.

Menu option	Function	Described in
Patient Record	The main Patient Record screen, used to enter patient information and to access many features of the system	User Manual Chapters 3 and 4
Appointments	Used to book and organise appointments for patients	User Manual Chapter 5
Daily Takings Report	Create a list of all financial transactions recorded on the system between selected dates	User Manual Chapter 6
Print Patient Recall Letters	Print any letters which have been created for recalling patients	User Manual Chapter 7
Setup Menu (with sub-menus)	Update lists of podiatrists and clinics and define user list Define the format of letters and send e-mail Amend others lists and parameters	User Manual Chapter 8 Chapter 7 Advanced Manual Chapters 8 to 10
Import/Export	Transfer of data to and from a laptop computer	Advanced Manual Chapter 11

Reports menu

Many reports can be created and printed out from this menu.

Menu option	Function	Described in
Report Generator	Generate 6 types of report, and select search the criteria for each report	Advanced Manual, Chapter 2
Appointment Reports	Create appointment history for each patient and produce statistics of missed appointment	Advanced Manual, Chapter 2
Print Patient Labels	Print address labels for selected patients	Advanced Manual, Chapter 2

Financial menu

A detailed accounting system can be created and organised using this menu.

Menu option	Function	Described in
Sales Menu	Organise patients' invoices and accounts, and print reminders	Advanced Manual, Chapter 4
Purchase Menu	Organise accounts for suppliers and print advice notes	Advanced Manual, Chapter 5
Miscellaneous Payments/ Receipts	Record receipts or payments for transactions which are not invoiced	Advanced Manual, Chapter 7
Nominal Analysis Codes	List and edit the analysis codes for transactions and view monthly summaries	Advanced Manual, Chapter 3
Journal Entries	Transfer money between analysis codes	Advanced Manual, Chapter 7
Parameters	Enter details and rules of your accounting system, eg VAT rates	Advanced Manual, Chapter 7
Financial Reports	Generate ledgers, audit trails, statements and balances	Advanced Manual, Chapter 6
Period/Year End	Perform routine after year end to reset accounts for next year	Advanced Manual, Chapter 7
Finance Utilities	Recalculate balances, analysis codes and nominal transactions	Advanced Manual, Chapter 7

EXPLANATION OF SOME TERMS USED

The system is based on menus and screens, similar to most computer systems. For those new to computers, some of the terminology used in these manuals is explained below.

Standard Windows terms

'Left click' (frequently shortened to 'click') means position the cursor over the required menu, field or button and click the left button of the mouse. Similarly, 'right click' means click the right button of the mouse, while 'double click' means click the left button of the mouse twice in quick succession.

Capital letters are used to describe specific keys on the keyboard, for example SHIFT, TAB, ALT, CTRL, and RETURN.

The '+' symbol is used to indicate that the key to the left of the '+' should be held down while the key to the right is pressed. For example, 'SHIFT + F' means that the SHIFT key should be held down while the 'F' key is pressed once.

'Tabs' are the words along the top of a menu screen which look like the tabs of a divider card. They do not form part of the Podiatry system, but are used in standard Windows operations, including setting up the screen resolution.

A 'pop-up menu' (or sometimes a 'drop down list') is a list of options that is superimposed on the current screen. When you make your selection, the menu disappears and you are left with the current screen.

The word 'desktop' is used to describe the display on the computer monitor when no windows (including this Podiatry system) are visible, and when the podiatry foot is visible.

Menus and options

The system uses menus to navigate to, or select, a particular function. The second line on the screen contains the words File, Edit, Podiatry Main menu etc. When the cursor is placed over one of these, and the left button of the mouse is clicked, a drop down list of options (a 'menu') appears on the screen. The tables of menus on Pages 1-3 to 1-6 show how the menus are organised, and where their use is described in the manuals. Further sub-menus may be available; these are indicated by an arrow at the right of the option. Options listed on a menu are shown in these manuals in double quotes, eg "Patient Record".

Screens

Information is entered into the system using computerised forms which are known as screens. The format and layout of the screens varies according to the information to be entered and the further options available, but the basic approach is the same. Each screen contains areas for entering data (called fields), and buttons to select another screen or perform an action (eg save). Some screens also contain boxes to view data entered elsewhere.

Moving within the screen

Some screens, particularly the correspondence screens, are too long to fit on the monitor, in which case arrows will appear on the right hand edge of the screen, with a scroll bar between them. To see further down the screen (called 'scroll down'), use the mouse to click on the down arrow at the bottom right of the screen, or drag the scroll bar downwards. To see further up ('scroll up'), click on the up arrow at the top right of the screen, or drag the scroll bar upwards.

Patient Record screen

The Patient Record screen is the screen that you will use most often being the main screen where most patient information is entered and retrieved. It is selected from the Podiatry Main menu. Chapter 3 describes the screen and its functions in detail.

Fields

Fields are the areas on a screen where information is entered, either by using the keyboard or by selecting an option from a menu. In these manuals, field titles are shown in *Italics*. Guidelines for the type or format of the information to be entered in any field are often given on the bottom line of the screen when the mouse cursor is in the field.

To move to a new field, position the cursor over the required field and press the left mouse button (left click). Alternatively, use the TAB key to move to the next field, or hold down the SHIFT key and use the TAB key to move to the previous field.

Boxes

Boxes are areas of a screen that the system fills in from information you have provided elsewhere. They provide a means of viewing associated information on a screen. Box titles are shown in *Italics*.

Buttons

Buttons are provided on a screen to select an action. Most buttons are at the bottom of a screen, but they do appear elsewhere. In these manuals, the names of the buttons are shown in ***bold italics***. If they are greyed out on the screen, that feature is not available at that time.

Many of the screens in the system use the same standard buttons. These include:

- ***Add***. Used to create a new record, eg a patient record
- ***Edit***. Used to change details within a record
- ***Find***. Used to find a particular record that has already been entered
- ***Next***. Moves to the next record
- ***Back***. Moves to the previous record
- ***Delete***. Deletes the record which is currently displayed on the screen (use with care)
- ***Ok***. Saves the record which is currently displayed on the screen, closes the screen and reverts to the next highest level
- ***Quit***. Closes the current screen and reverts to the next highest level
- ***Cancel***. Clears the current screen - any information that has been entered is lost

To select the action, left click on the button. Alternatively, hold down the ALT key and type the letter underlined on the button (eg ALT + E for Edit).

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.

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.

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 replaces 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 information

After entering all necessary information to a screen or record, click on the *Ok* button or press the RETURN key to save the data to the hard drive of your system. If the information entered is not required, or must be corrected, click on the *Cancel* button which will remove all the information entered on the current screen.

Closing the system

To exit the system when you have finished using it, close the screen by clicking on the *Quit* button. Then click on the File menu, move the cursor down until "Exit" is highlighted and left click. Alternatively, you can click on the red cross at the top right-hand corner of the screen.

CHAPTER 2 – SETTING UP THE SYSTEM

You will already have used the Introductory Manual, using the Example data, to develop an understanding of the main aspects of the system. However, before starting to enter information for your own patients, several parameters have to be defined. These are explained in this chapter.

There are three aspects to preparing your computer and the Podiatry system:

- Getting your computer ready for the Podiatry software
- Installing the permanent Podiatry software or updating the Trial version
- Performing the quick set-up procedure to enter your standard practice information in your own database.

GETTING YOUR COMPUTER READY

The Podiatry Practice Management software needs to run with a screen resolution of at least 800 pixels by 600 pixels. If your computer is very old and you want check that your computer is set up correctly, right click on the desktop (where there are no icons). This will display a small menu with the bottom item “Properties”. Left click on “Properties”. This produces a screen titled ‘Display Properties’ with a number of tabs across the top. Left click on the ‘Settings’ tab. The information now displayed varies according to the video card in your computer but in general terms you need to look for a setting entitled Screen area or Resolution. If this is shown as 640 x 480, change it to 800 x 600. Any higher numbers are also acceptable, but make the podiatry screen smaller.

While you are checking the settings, ensure that the number of colours displayed is greater than 256 (16 bit or greater is also sufficient). If you alter the colours, re-check the display resolution.

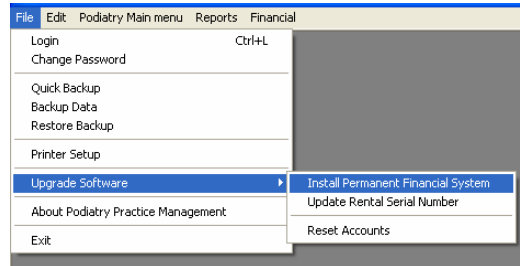
Left click on *Apply* and then on *Ok* to close the settings screen. Close down and restart your computer if it has asked you to do so.

INSTALLING THE SOFTWARE

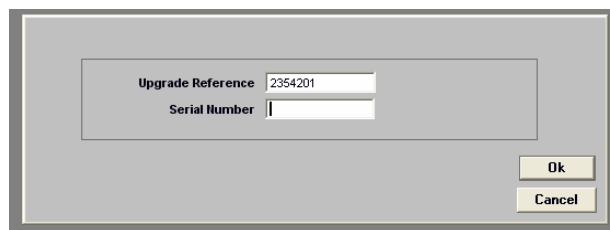
Follow the instructions in the Introductory Manual to install the software and to experiment with the Example data file.

PPMS USER MANUAL

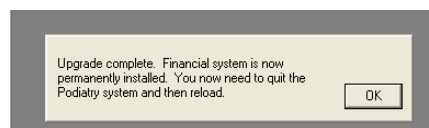
As soon as you have paid for the licence, you will receive an Activation Code. On receiving the code, you need to install the permanent Podiatry system. To do this, select “Upgrade Software” then “Install Permanent Financial System” from the File menu as shown here. (ie left click on the File menu, move the cursor down until “Upgrade Software” is highlighted which brings up a sub-menu, and then move the cursor to the right until “Install Permanent Financial System” is highlighted and left click.)



This opens up the screen shown below.

A dialog box titled 'Upgrade Reference'. It contains two text input fields. The first field is labeled 'Upgrade Reference' and contains the value '2354201'. The second field is labeled 'Serial Number' and is empty. There are two buttons at the bottom right: 'Ok' and 'Cancel'.

Type in your activation code in the *Serial Number* field and left click on the **OK** button. This opens the new screen below.

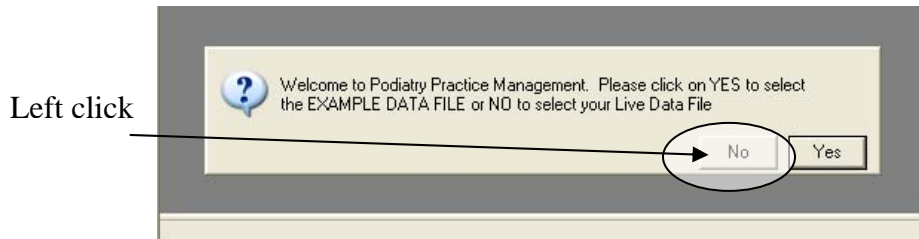


Left click on the **OK** button. Then select “Exit” from the File menu to close the system.

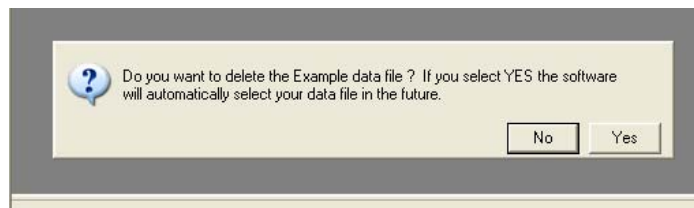
QUICK SET-UP FOR YOUR OWN DATABASE

Select the live data option

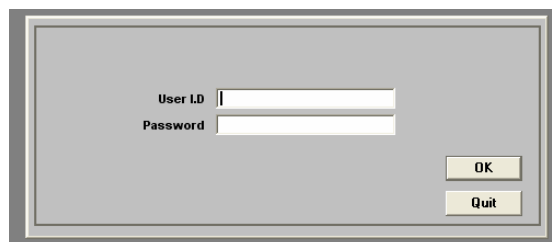
Now you need to open the permanent Podiatry software and start using the 'Live' version. To do this, double click on the foot icon on the desk top. This opens the screen below.



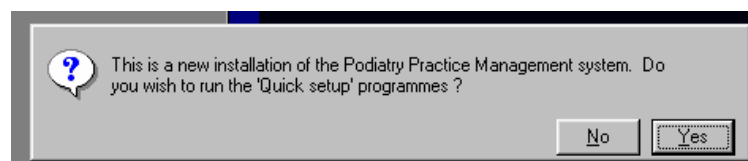
Left click on the *No* button to select live data. A further screen then appears as below, asking if you wish to delete the Example data file.



There is no advantage in deleting the Example data file immediately, as you may wish to revert to the Example data to experiment with a function before using it on the live data. It would be sensible to keep the Example data until you are confident with the system. Therefore left click on *No*. The Log in screen opens as below.



Enter your ID and password and left click on the **OK** button. If you have not created any users enter 'Podiatry' for the User ID without any password. Another screen appears as below.

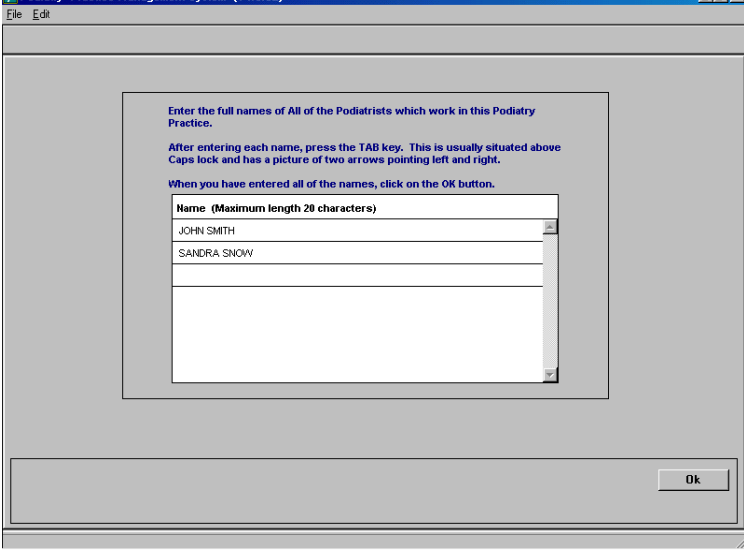


Quick set-up routines

There are several quick set-up routines described below which help you set up your clinics and appointment diary sheets. Left click on **Yes** to start the quick set-up. If you don't do this, or if you don't enter all the information, you can enter it or change it later. However, it is easier to do it now.

Podiatrists

A new screen appears with space to enter your own podiatrists. The view below shows the screen with 2 podiatrists listed.



The screenshot shows a software window with a menu bar containing 'File' and 'Edit'. The main area contains a text box with the following instructions:

Enter the full names of All of the Podiatrists which work in this Podiatry Practice.
After entering each name, press the TAB key. This is usually situated above Caps lock and has a picture of two arrows pointing left and right.
When you have entered all of the names, click on the OK button.

Below the instructions is a list box titled 'Name (Maximum length 20 characters)'. The list contains two entries: 'JOHN SMITH' and 'SANDRA SNOW'. There are empty lines below these entries. At the bottom right of the window is an 'Ok' button.

Type in the names of each podiatrist who works within your Practice. After entering each name, press the TAB key to move down to the next line.

If you make a mistake and need to move back up a line, either left click in the line with the mouse, or hold down the SHIFT key and press the TAB key.

When you have entered the names of each clinician, left click on the **Ok** button. The system will then ask if the names are correct. Left click on **Yes** to continue or **No** to enter them again.

Clinics

After clicking on *Yes*, a new screen appears as below.

A clinic is a unique podiatrist or location against which an appointment can be made for a patient. Each 'clinic' has its own Appointments Diary.

So, if you have two podiatrists (chairs) in your practice these need to be entered as two different clinics because you would have separate appointments for each. You could also have a separate clinic for home visits (DOMS), or you could have one combined clinic for each podiatrist. Generally, unless you have several podiatrists sharing a room on different days of the week it is easier to set up one clinic for each podiatrist, using the podiatrist name for the clinic.

First you must enter the first and last appointment times for both morning and afternoon sessions. If the default times on the screen suit your practice, then just use the TAB key to take the cursor through the fields of the times to reach the *Name* field. Otherwise, move the cursor to the first field to be changed and type in the new time.

In the *Name* field, enter a name for the first clinic, press TAB and enter the usual duration for each appointment. Choose this figure carefully; would you rather make the duration short, and book a double appointment for longer sessions, or would you prefer to make the duration longer, and add extra appointment times for short sessions.

Then TAB through each day and enter YES if the clinic is available for that morning/afternoon and NO if it isn't.

Enter the full names of the different Clinics/Locations where you treat patients. For example, a small one man practice would enter one clinic representing the Practice and another for home visits. If two Podiatrists could be working in the same location at the same time, then enter this location name twice. To put in another way, a Clinic name needs to be entered for each 'Chair'. If you have two Chiropody chairs, you need to enter two Clinics.

After entering the name of the Clinic press TAB and then type in the usual duration of each appointment and against each day of the week, select which mornings and afternoons (including evenings) you provide a podiatry service.

When you have entered all of the details, click on the OK button.

After you have clicked on the OK button, the system will Insert a Clinic record for each line entered. These Clinics are necessary so that the appointment system knows which days you work and where.

Don't worry if you make a mistake, these details can easily be amended on the Clinic programme. If your Start times differ from day to day, these can be amended using Clinic Templates.

If you have any problems, please telephone our help desk.

First AM Appointment	09:00	Last AM Appointment	12:00	First PM Appointment	13:00	Last PM Appointment	17:00								
Name (Max length 30 characters)	Default Duration (In Minutes)	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thur AM	Thur PM	Fri AM	Fri PM	Sat AM	Sat PM	Sun AM	Sun PM
ST JOHNS (MACDONALD)	20	YES	YES	YES	YES	YES	NO	YES	YES	YES	YES	NO	NO	NO	NO
HIGH STREET (J SMITH)	20	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	NO	NO
SANDRA SNOW	20	NO	NO	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO	NO	NO

Ok

In the example above we have a two chair practice (2 podiatrists work there at the same time). Chair 1 is available everyday except Tuesdays and Sundays. Chair 2 is available for appointments on each weekday, and a separate Home visit clinic for Sandra Snow is available on a Friday afternoon.

You don't have to describe the clinics as 'Chairs' if you don't want to. The system will accept any description you put in. Don't worry if the duration of appointments can change, or if the details entered do not accurately represent your practice. The main reason for this 'Quick set up' is so that you can quickly get a feel for how the system works. The clinic timetables can be amended later, as described in Chapter 8.

When you have entered all the Clinic details, left click on the **Ok** button, and when prompted left click on **Yes** to continue.

Appointments diary

You are now given the option to create appointments diary sheets for the next four weeks for the clinics above. If you wish to create these at this time left click on **Yes**, otherwise left click on **No**. If you left click on **Yes**, a box will appear in a few seconds telling you the period the sheets have been created for. If you left click on **No**, you can create the diary sheets later.

Chapter 5 explains how to create more diary sheets.

Financial year

The final stage is to enter the start date of your financial year. This is important if you intend to use the financial module of the system. Left click on **Ok** to obtain the screen below.

Last Sales Inv.	0	Sales Rec.	0	Purchase Inv.	0	Purch Pay.	0
Cashbook	0	Journal No.	0	Last Transaction No.	0		
VAT Rate 0	0.00	1	17.50	2	0.00	3	0.00
		4	0.00	5	0.00		

Display INV/REC/PAY Numbers ?	<input type="checkbox"/> NO
Financial Year Start	<input type="text" value="1 JAN 2003"/>
Delete transactions at Year End ?	<input type="checkbox"/> NO
Automatically 'Age' Account balances	<input checked="" type="checkbox"/> YES
Do you wish to use Period ends ?	<input type="checkbox"/> NO <small>(YES will prevent transaction dates outside the current period. NO will allow any date provided they are within your current financial year)</small>
Current Period	<input type="text" value="1"/> <small>(If you don't use Period ends, this will remain as 1 or 0 all year)</small>
Valid Transaction Dates are between	<input type="text" value="1 JAN 2003"/> and <input type="text" value="31 DEC 2003"/>
Default Bank Account	<input type="text" value="1200"/> <input type="button" value="Bank Current Account"/>
Statement Comments	<input type="text"/>
Invoice Top Margin	<input type="text" value="0.00"/>
Left Margin	<input type="text" value="0.00"/>
Display treatment descriptions on Invoice ?	<input checked="" type="checkbox"/> YES
If NO Use Description	<input type="text" value="CHIROPODY"/>
Print Invoice Default	<input checked="" type="checkbox"/> YES
Print Receipt Default	<input type="checkbox"/> NO
Show Zero Balances ?	<input type="checkbox"/> NO

Move the cursor to the field *Financial Year Start* and enter the appropriate date. The other fields in this screen can be ignored for now (see Chapter 7 of the Advanced Manual for a description of the other fields on the accounts parameters screen). Left click on **Ok** to leave this screen, and then left click on **Ok** again to exit back to the desktop.

Now you are ready to start entering patient information in earnest.

CHAPTER 3 - THE PATIENT RECORD SCREEN

INTRODUCTION

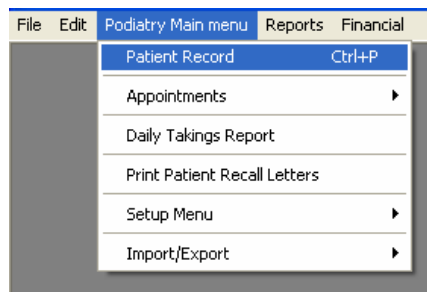
The Patient Record screen is the main entry point to the Podiatry system, and is the screen you will use most often. It is where you enter a patient's personal details and past history, and the name of their podiatrist. Most information about patients is either on the Patient Record screen or reached from it.

Chapter 2 explained how to enter the details of clinics and appointments specific to your practice.

This chapter explains the features of the Patient Record screen, and describes how to enter information into the fields. The screen can also be used to report treatments given to patients (see Chapter 4), to view appointments (see Chapter 5), and to determine fees (see Chapter 6).

To start the Patient Record screen, double click on the Foot icon on the desktop.

Then left click on the Podiatry Main menu to bring down the menu, and left click on "Patient Record".



Alternatively, hold down the CTRL button and type P to open the Patient Record screen.

LAYOUT OF THE PATIENT RECORD SCREEN

The Patient Record screen is shown below.

The screenshot shows a patient record form with various input fields and buttons. The form is divided into several sections:

- Personal Information:** Record No, (Alternative No.), Date of Birth, (Age), Sex, Title, Surname, First Name(s), Address, Post Code, Telephone, Email Address, Weight (Kgs), Height.
- Professional Information:** Podiatrist, Registered Clinic, Occupation, Referral, Registered GP Practice, GP, Patient Category, Category 2.
- Administrative/Financial:** Insurance Ref, Allergies, Comments or GP Info, Account Balance £, Account Card.
- Appointment/History:** Next Appointment, Date of Referral, First Treated, Last Treated, App Due, Died.
- Navigation Buttons:** Add Patient, Edit, Find, Find / List, Next, Back, Delete, Quit, Treatments, Appointment History, View Scanned Images, Letters History, Print, >Page, Cancel.

 Annotations include a circle around the personal and professional information fields labeled 'Patient detail fields' and another circle around the navigation buttons labeled 'Main Buttons'.

It consists of fields in which you can enter or view information, and buttons for moving to other screens or for finding information that has already been entered.

CREATING A NEW PATIENT RECORD

When you select the “Patient Record” option from the Podiatry Main menu you will see the screen above. Note that only five of the buttons along the foot of the screen are black; the rest are greyed out. This shows that these black buttons are the only ones that will respond to a left click of the mouse.

Practise

To help you gain confidence before starting to enter actual information about your patients into the system, we recommend that you read through this whole chapter and have a few trials first. You can either leave the Podiatry system altogether, and re-start it using the Example data, or you can create records for fictitious patients. If you do the latter, make a note of the names you use so that you can delete the records later. However you do it, you should practise using the buttons, familiarise yourself with the various screens and what to enter on them, and find out how to get back to the Patient Record screen. Always look out for notes and guidelines on the screen. Follow the instructions below to create several new records until you are happy that you understand how to use the system.

The system's response to buttons, and whether they can be used, depends on what you are doing at the time. If you are unsure which screen you are on, check which buttons are greyed out at the foot of the screen. If you are really stuck, click on *Cancel* or *Quit* until you revert to the initial (blank) screen and start again.

Create a new record

To create a record for a new patient, click on the *Add Patient* Button. If you prefer not to use the mouse you can hold down the **ALT** key and press **A** at the same time (ALT + A). This creates a blank Patient Record on which the *Ok* and *Cancel* buttons are black, and the rest of the buttons are grey.

Enter information

Fields are the areas where you enter information. Often examples of acceptable entries are shown beside a field, or helpful comments may be given on screen. Also, when you move the mouse cursor over a field, guidelines may be given on the bottom line of the screen as to the format or contents of the field.

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, leave it as the default date and change it 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*.

When you enter data in some fields, the system validates your entry by checking that the format is consistent, and that the correct types of values are being entered. If the system detects an error, your computer will beep. Always look out for notes and guidelines on the screen.

Save record

When you are happy with the details you have entered, click on the *Ok* button, or press the RETURN key. This will save the record permanently in the system on the hard disk of your computer. (If you do not wish to save anything you have just typed, click on the *Cancel* button to return to the main Patient Record screen.) Note that the same five buttons are again black along the foot of the screen.

Amend 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** button (see Page 3-9). Now you are viewing an actual record and all but three of the buttons at the foot of the screen are black.

Then click on the **Edit** button, which allows you to change or add to your entries in the fields. Here only the **Ok** and **Cancel** buttons are black. 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, with all but three of the buttons black. If you click on the **Cancel** button, the screen will revert back to the previous Patient Record before your changes, with only five black buttons.

DETAILS OF FIELDS OF PATIENT RECORD SCREEN

The following are guidelines of what to enter in fields, and their use.

Obligatory fields

The only fields of the Patient Record screen that you must complete are *Date of Birth*, *Sex* and *Surname*. However, the Date of birth can be left as today's date and then amended later.

Record Number

The first field for the patient has the title *Record No.* The system allocates the next number automatically, so when you click on the **Add Patient** button the cursor moves past this field, and you cannot type in it.

However, if you wish, you can enter the record numbers yourself, by changing the User Parameters on the "Advanced Setup" menu as described in Chapter 10 of the Advanced Manual.

Date of Birth

This field must be filled in before the patient record can be saved; the system automatically enters the current date which you must change. Type in the patient's actual date of birth in the format DD/MM/CCYY or DD MON YYYY (note the guidelines on the bottom line of the screen stating this). If you enter only 2 digits for the year, eg 02, the system assumes a year of 1902, not 2002. If the date is not valid (eg 29 February 1953), the system will not allow you to move the cursor from the field.

Sex

The *Sex* field initially contains 'M' for male; you can change this to 'F' for female if appropriate. However, if you complete the *Title* field with, for example, 'Mr', 'Mrs', 'Miss' or 'Ms', the *Sex* field will be updated automatically.

Surname

The *Surname* field must be completed before the patient record can be saved. The name must be at least 3 characters long, but no more than 14. Longer names must be abbreviated.

Fields for personal details

It is generally self-explanatory what should be entered in the other fields, but here are a few pointers.

Alternative No

Should you wish to have a cross reference to another number, eg the patient record number used by GPs, this can be entered in the *Alternative No* field.

If you have no need for the GP's number, this field could be used to record your own patient reference number, or it can be left blank.

Age and Sex

The *Age* and *Sex* fields are calculated by the system from the information entered in the *Date of Birth* and *Title* fields respectively.

Address and post code

Enter the patient's full address and post code (if you know it) in the fields for the address.

E-mail address

If you intend to use the system to send e-mails to patients, you have to enter the patient's e-mail address in the *Email Address* field. This can be done at any time before you send the first e-mail.

Selection fields

There are eight fields at the right of the screen whose entries are selected from a pop-up 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. Below is the screen displayed if you click in the *Occupation* field.

The screenshot shows a patient record form with the following fields and values:

- Record No: 00003 (Alternative No.) Date of Birth: 12 OCT 1953 (Age: 50) Sex: F
- Title: Mrs
- Surname: Bloggs First Name(s): Samantha
- Address: 10 Hight Street
- Post Code:
- Telephone: /
- Email Address: Send Email
- Weight: (Kgs) Height:
- Insurance Ref:
- Allergies:
- Comments or GP Info:
- Account Balance £: 0.00
- Account Card:
- Next Appointment: Friday 21 MAY 2004 14:40 SANDRA SNOW
- Date of Referral: 3 MAY 2004 First Treated: 30 APR 1904 Last Treated: 30 APR 1904 App Due: Died:

The 'Occupation' dropdown menu is open, showing the following options:

- ACCOUNTANT
- ACTOR
- AEROBIC INSTRUCTOR
- AIR FORCE
- ANALYST

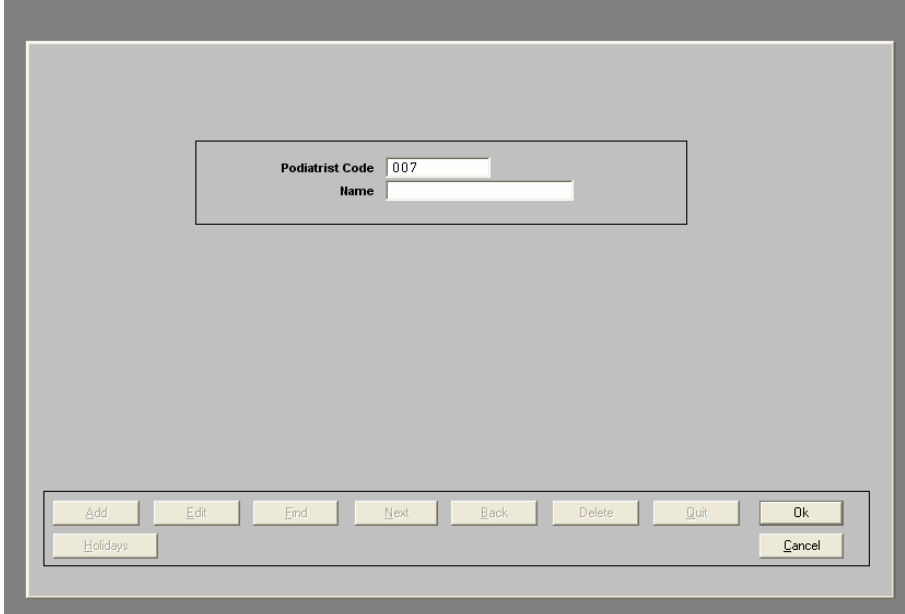
The selection fields are:

- *Podiatrist*.
- *Registered Clinic*.
- *Occupation*. Select from the list of available options the occupation closest to that of the patient.
- *Referral*. How the patient heard about your practice.
- *Registered GP Practice*. Select from the list of options the practice the patient is registered with.
- *GP*. Having selected the GP practice, a short list of GPs in that practice is available here.
- *Patient Category*. Notes of risk or need for reminder.
- *Category 2*. As patient category above.

You can amend the list of available options for some of the above by selecting “Setup Menu” from the Podiatry Main menu, see Page 8-2 for more details.

The others can be changed from the “Advanced Setup” menu. See Chapter 2 of the Advanced Manual for more details.

Alternatively, you will see that the last entry on each pop-up menu is *****Add New Record*****. Select this if you want to add a new entry on the list. For example, if you want to add a new podiatrist, click on *****Add New Record***** and the following screen for adding a record for a new podiatrist appears.



The screenshot shows a dialog box for adding a new podiatrist record. It features a central form with two input fields: "Podiatrist Code" containing the value "007" and "Name" which is currently empty. Below the form is a horizontal toolbar containing several buttons: "Add", "Edit", "Find", "Next", "Back", "Delete", "Quit", "OK", "Holidays", and "Cancel". The "OK" button is positioned to the right of the "Quit" button, and the "Cancel" button is positioned to the right of the "Holidays" button.

Any reference code in the top field of this new screen is entered automatically by the system. Simply type in the details for the other fields (in this case, just the one) and click on the **Ok** button to add your entry to the list. The system returns to the Patient Record screen and inserts your new entry in the field. If you click on the **Cancel** button the system returns to the Patient Record without adding your entry.

Patient appointment fields

These appointment fields at the foot of the screen are for entering or viewing details of the patient's past and future appointments. Some of these fields are completed automatically when you record treatments, or allocate an appointment time, and cannot be filled in on the Patient Record screen. The fields are:

- *Next Appointment.* This field is completed when you allocate an appointment time for the patient; you cannot enter the date here. See Chapter 5.
- *Date of Referral*
- *First Treated.* This is the date that the patient was first treated by you. For existing patients, you must enter the date yourself. For new patients, the date will be created automatically when the first treatment is recorded.
- *Last Treated.* This field is created automatically by the system; you cannot enter the date here.
- *App Due.* The date the patient is due for another treatment. This is calculated using the date and the return period specified in the patient's last treatment. For more information, see Chapter 4.
- *Died.* Where appropriate, enter the date the patient died to prevent any appointments being made accidentally.
- *Other boxes beside the next appt field.* The date, time and location of the appointment. If the 'Allow Appointment notes' option is set in the parameters screen a description of the appointment will also be displayed. See chapter 10 in the advanced manual.

DETAILS OF BUTTONS OF PATIENT RECORD SCREEN

Control buttons at foot of screen

Add Patient

When you left click on the **Add Patient** button, the system creates a new blank Patient Record. This is where you enter the particulars of a new patient.

To leave this screen without saving any information, left click on **Cancel**.

Edit

The **Edit** button allows you to change details within a record after it has been saved. However, an actual record must already be displayed on the screen. If there is not, the **Edit** button will be in grey and will not respond when clicked on. Use the **Find** or **Find/List** button to select the record you wish to change.

Find and Find/List

There are two buttons for searching for records. The **Find** button allows you to search using one (but only one) of a number of fields. If you click on the **Find** button, you can ask the system to search on any one of the following fields:- *Record Number, Alternative Number, Date of Birth, Surname, Address, Post Code, or Telephone Number*. Simply move the cursor to the field you wish to search on, enter the details (or part of them) into the field, and click on the **Ok** button to obtain the first record that matches your search criterion.

When you search for a record using the **Find** button, the system tries to find the exact match to what you entered. If it cannot do so it will find the nearest record in alphabetical order after whatever you entered. Say, you type 'Clark' into the *Surname* field. If *Clark* exists, it will find that record. If not, it will find the next record in alphabetical order eg *Clarkeson*, or if there were no surnames beginning with *C*, it might find *Deeks*. Also, if you searched on the Patient Record Number and you entered a value which did not exist eg *0020*, the system will find the next record which does exist, such as *0021* or *0025*. This is useful if you are trying to find a record where you do not know the full value of the field. For instance, if you enter the first few characters of a Surname, the system will find the first record, and you can use the **Next** and **Back** buttons to go through the records to locate the one you require.

The **Find/List** button allows you to search on several fields at the same time, these are:- *Surname, First Names, Address* (or any part of them), and *Date of Birth*. When you use the **Find/List** button, a new screen appears, as below.

All fields are optional except for the Surname. When entering the address you do not need to enter the house number.

Double click on required Record

0001	Philip	Clarke	23 RIVERSIDE ROAD	11 JAN 1970
0002	John	Clarke	12 FREDERICK STREET	1 FEB 1980

As explained on the screen, you must enter at least part of a surname in the *Surname* field, and then enter any other fields you wish to search on. Click on **Ok** to start the search. The system then loads up a list of all the patients that match your selection. Double click on the patient you want and the system will return back to the Patient Record screen with that patient displayed.

Next and Back

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 reverse order.

Delete

The **Delete** button is used to delete a record from the system. When you click on **Delete**, the system will always ask you if you are sure before deleting the record. Deleting records should be done with great care. **When a record is Deleted you cannot get it back.** You can usually re-enter the record taking care to keep the same Reference Code, but you cannot get back a deleted record.

Quit

Quit closes the Patient Record screen, and returns you to the initial (blank) screen.

Ok

The **Ok** button saves the information you have entered on the Patient Record screen into the memory of the computer. It is also used on other screens, to save information, or accept details provided by the system.

Cancel

Use the **Cancel** button to leave or abort a screen without saving any details entered. Unlike the **Quit** button, it does not revert to the initial (blank) screen, but remains in the Patient Record screen.

Information buttons at foot of screen

These buttons can only be used when you have selected a patient record using the **Find** or **Find/List** buttons, or have just clicked on **Ok** having used the **Add Patient** button.

Treatments

The **Treatments** button allows you to record full treatment details for patients including pre-defined and user defined templates. Clicking on the button brings up a new screen; to return to the patient record, click on the **Quit to Patient Record** button at the right of the Treatment screen. Entering and organising treatments is described in Chapter 4.

Appointment history

This is used to print a report to the screen showing the patient's history of appointments and whether they were attended, cancelled or not attended. Clicking on the button brings up a new screen; to return to the Patient Record, click on the red X at the top right of the screen. Chapter 5 explains how to enter and organise appointments.

View Scanned Images

You can create and store correspondence using the Podiatry system. In addition, old letters and correspondence received can be scanned in to your computer and listed on the Patient Record screen. The system allows you to record up 999 images against each patient record.

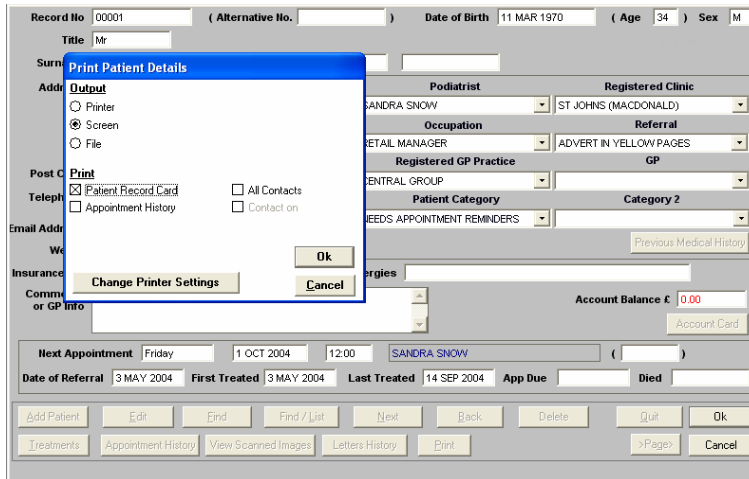
Clicking on the ***View Scanned Images*** button brings up a new screen. To return to the Patient Record screen, click on the ***Return to Patient Record Card*** button at the foot of the screen. For more information, see Page 7-8.

Letters History

This shows a complete record of letters and e-mails sent from you about this patient, providing they have been sent using the Podiatry system. Clicking on the ***Letters History*** button brings up a new screen. To return to the Patient Record screen, click on the ***Return to Patient Record Card*** button at the foot of the screen. See Chapter 7 for more details.

Print

Clicking on the **Print** button brings up the pop-up menu as below. This menu allows you to determine the destination of the information, be it to a printer, to the screen, or to an ASCII file. Click in the circle beside your choice.

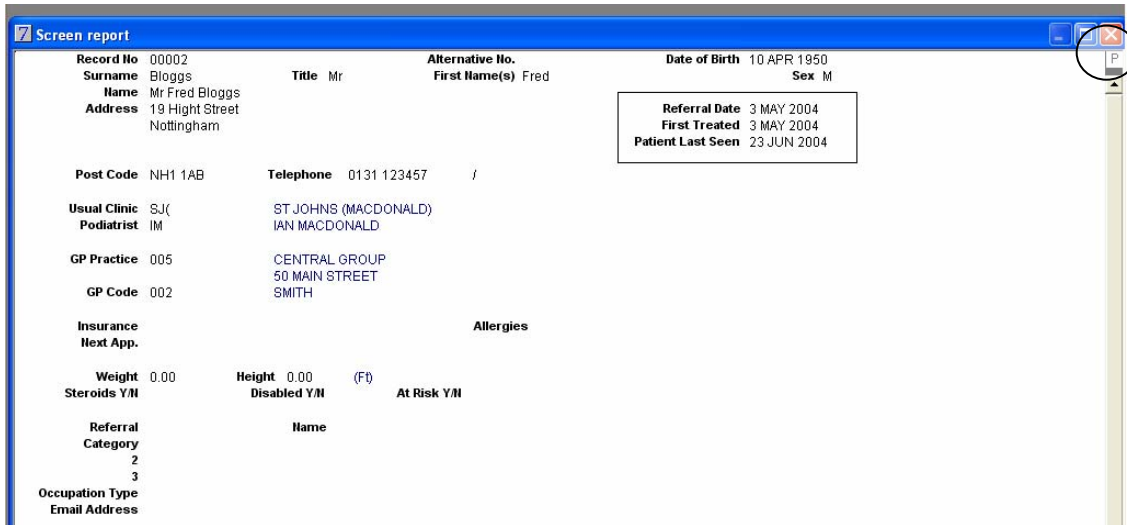


You have the option to print any combination of:

- The Patient Record screen
- The Appointment History
- All Treatments for that patient.

To select or deselect any one of these options, simply click in the square next to the label. A cross indicates that it will be printed. When you are happy with your selection, click on the **Ok** button. If you do not wish to print at this time, click on the **Cancel** button.

If you selected *Screen* from the print menu and now wish to send to the printer, click on the letter P at the top right of the screen (as circled below).



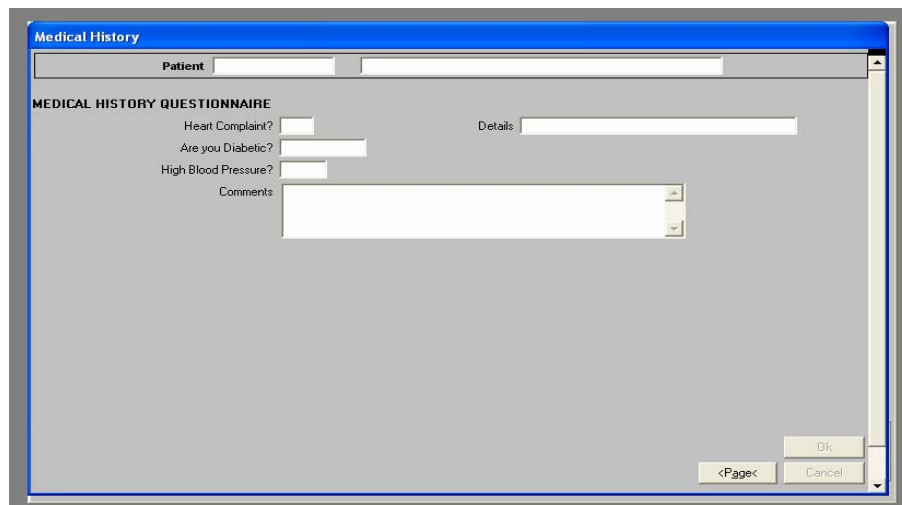
Then on the pop-up menu, click on "Print Page".

If you have printed to the screen, but do not wish to print further, click on the red X above the P to return to the Patient Record screen.

>Page>

You can define your own second page of the Patient Record screen. If you do so, the >Page> button will be black, and clicking on it will open your second page. This could be used to define a medical history questionnaire that matches your paper records, instead of using the *Previous Medical History* button.

An example of this page is given below. For further information see Chapter 8 of the Advanced Manual.



Other buttons**Send e-mail**

If you have the capability, the system allows you to send an e-mail to a patient. First select the record of the patient you wish to e-mail, using the ***Find*** or ***Find/List*** buttons. Then enter the patient's e-mail address in the ***Email Address*** field of the Patient Record screen if it is not already there. Click on the ***Send Email*** button beside the field. This brings up the new screen as below.

Complete the ***From***, ***To***, ***Reference*** and ***Subject*** fields and type in your message. When you have completed the e-mail, click on the ***Ok*** button to place it in the queue of e-mails waiting to be sent and return to the Patient Record screen. If you do not wish to create an e-mail at this time, click on the ***Cancel*** button. For further details see Page 7-16.

Previous Medical History

The button ***Previous Medical History*** is used to enter details of the patient's past medical history. This can either be entered as free text or you may choose to use the drop down lists to select standard descriptions for conditions and medication. If you do choose this method you can use the report generator to analyse the patient database. The lists can be amended using the "Advanced Setup" menu, see Chapter 8 of the Advanced Manual.

Account Card

The ***Account Card*** button brings up a new screen and takes you into the financial functions of the system. Click on the ***Patient Record Card*** button at centre right of the screen to return to the Patient Record screen. The basic functions of the financial system are described in Chapter 6, with a description of the new screen on Page 6-6. Fuller details are given in Chapter 4 of the Advanced Manual.

CHAPTER 4 – PATIENT TREATMENTS

INTRODUCTION

This chapter explains the two methods of entering treatments given to patients using the patient treatment screens. The treatment screens can also be used to determine fees (see Chapter 6) and create correspondence (see Chapter 7).

Protecting treatment information

To protect any treatment information entered, and to ensure that records cannot be altered, the system automatically locks this information. However, there is a delay before the information is locked to allow last minute changes. The default delay allows changes to be made on the day the treatment particulars are entered, and on the following calendar day (not working day). After this, the information cannot be changed, even by altering the date on your computer. This protection is particularly important if you do not keep a written record of each treatment.

Note that ‘calendar day’ does mean calendar day and not working day. If you enter a treatment on a Friday afternoon, you will not be able to edit it on the next working day (Monday). However, the number of days before a record is locked can be changed by selecting “User Parameters” from the “Advanced Setup” menu (see Chapter 10 of the Advanced Manual).

If you do need to add more information after the record is locked, you can insert another treatment with the same treatment date and enter the amendments in the treatment notes.

ORGANISATION OF TREATMENT SCREENS

There are two screens for entering particulars of treatments given to a patient. The initial treatment history screen appears after clicking on the ***Treatments*** button on the Patient Record screen and shows the history of treatments to date. From here, you select one of the two following methods of entering treatment particulars (or both can be used

- Add basic treatment. This is the simple method. You type in your own treatment notes, and any patient comments.
- Add detailed treatment. Here you pinpoint the treatment area on the foot and select treatments from menus of options. This ensures standard wording is used, which can be monitored to create reports and statistics.

TREATMENT HISTORY SCREEN

To open the treatment history screen, first select “Patient Record”, from the Podiatry Main menu. Then find or enter the record for the patient whose record you wish to update (as detailed in Chapter 3). Finally click on the *Treatments* button to bring up the treatment history screen as below.

The screenshot shows the 'Patient Treatment History' screen. At the top, there are fields for 'Patient' (00009) and 'Mrs Pamela Johnson'. Below this is a 'Patient Recalls' section with a table with columns 'Description', 'Date', and 'No.'. There are 'Add Recall' and 'Remove Recall' buttons. The main area is titled 'Patient Treatment History' and shows a date '30 JUN 2004'. At the bottom, there is a status bar: 'Record will be locked 1 day(s) after treatment was inserted' and 'Rec No. 21'. Below the status bar are buttons for 'Add Detailed Treatment', 'Add Basic Treatment', 'Amend Treatment for 30 JUN 2004', 'Print', 'Delete Treatment', 'Print Letter', and 'Quit to Patient Record'.

This screen shows the patient’s name and number at the top of the screen. Below this are two boxes showing any particulars already entered, and several buttons.

Add treatment information

To enter details of a treatment, click on either the *Add Detailed Treatment* button (see Page 4-8), or the *Add Basic Treatment* button (see Page 4-5).

Or, if you want to amend a treatment record, highlight the one for which you wish to enter details. Then click on the *Amend Treatment for ‘date’* button.

Details of treatment history screen

Patient recalls

The two buttons (*Add Recall* and *Remove Recall*) allow you to create a system of recall letters for the patient, to remind them that their next appointment is due or their orthotics need to be checked. The *Patient Recalls* box lists any outstanding recall letters that have not been sent.

To print a recall letter, select “Print Patient Recall Letters” from the Podiatry Main menu.

For details on setting up Recall templates and printing recall letters see Chapter 7.

Patient Treatment History box

The box titled *Patient Treatment History* displays all the treatment notes that are recorded on the system for that patient. The most recent treatment with its date and notes is shown at the foot of the box.

To view or amend previous treatments, use the scroll bar to scroll upwards. Click on any line relating to that contact and click on the *Amend Treatment for ‘date’* button to view the details of that contact. To return to today’s treatment, scroll down to the bottom of the list and click on today’s date.

Buttons of treatment history screen

Amend Treatment

The *Amend Treatment for ‘date’* button allows you to change treatment details, but only within the selected timeframe (normally the next calendar day). To change any treatment details, select the treatment date at the start of the treatment notes in the *Patient Treatment History* box, by clicking on it. The line will be highlighted in blue. Then click on the *Amend Treatment for ‘date’* button.

The screen that appears next depends on which screen you used to enter the treatment details. If you used the basic treatment screen, then this will appear with the details you entered, otherwise the detailed treatment screen will be displayed.

This button can also be used to calculate fees for treatments already entered (see Chapter 6 for details).

Print

Clicking on the **Print** button brings up a pop-up menu as on the Patient Record screen (see Page 3-12). This menu allows you to determine the destination of the information, be it to a printer, or to the screen, or to an ASCII file. Click in the circle beside your choice. You can print the Patient Record screen details, Appointment History, or All Contacts (treatments) for the patient. Also, you can print only the contact that you are currently working.

Delete Treatment

The **Delete Treatment** button allows you to delete a complete treatment entry. However, you can only do this before the treatment is locked (see Page 4-1).

To delete an entry, click on any line of the entry in the *Patient Treatment History* box. The line will be highlighted in blue. Then click on the **Delete Treatment** button. When prompted '*Are you sure you wish to Delete this Treatment?*' click on the **Yes** button. This deletes the treatment details, but not the Patient Record itself.

If you are out of time, the message '*This treatment can no longer be deleted*' will appear, click on OK.

Print Letter

This enables you to print a letter to (or about) this patient. For more information see Chapter 7.

Quit to Patient Record

When you have finished adding or reviewing treatments for the patient, use the **Quit to Patient Record** button to revert to the Patient Record screen.

BASIC TREATMENT SCREEN

To open the basic treatment screen, click on the ***Add Basic Treatment*** button on the treatment history screen. A new screen is displayed as shown below, and is used to type in your own notes of the treatment.

Fields of basic treatment screen

By default, the system enters the current date in the *Treatment Date* field. Ensure this is correct, or enter the actual date of the treatment.

Should you wish to specify a return date, type in the number of weeks until the next appointment in the *Return* field. The system will calculate and enter the exact date. The date then appears in the *App Due* field of the Patient Record screen.

If you have specified a podiatrist and clinic for this patient, the system enters these automatically in the fields *Podiatrist* and *Clinic* respectively. Otherwise, select these from the pop-up menus which appear when you click in the field.

Entering basic treatment information

In the *Patient Comments* field, type in the summary you wish to document of what your patient has said.

In the *Treatment Notes* field type in the particulars you wish to be logged on the system about the treatment.

Remember that you will not be able to amend these details after the treatment is locked, so check what you have entered before saving.

Click on the **Ok** button to log the particulars you have entered and return to the treatment history screen.

Buttons of basic treatment screen

Fees

When you click on the **Fees** button, a new section appears on the left-hand side of the screen. This can be used to calculate the cost of a treatment and stock items and create an invoice. This is explained further in Chapter 6. Click on the **Treatment** button to return to the basic treatment screen.

Assessment

The **Assessment** button brings up a new section on the left-hand side of the screen. It enables you to perform different types of assessments such as biomechanical examinations, orthotic prescriptions and patient assessments.

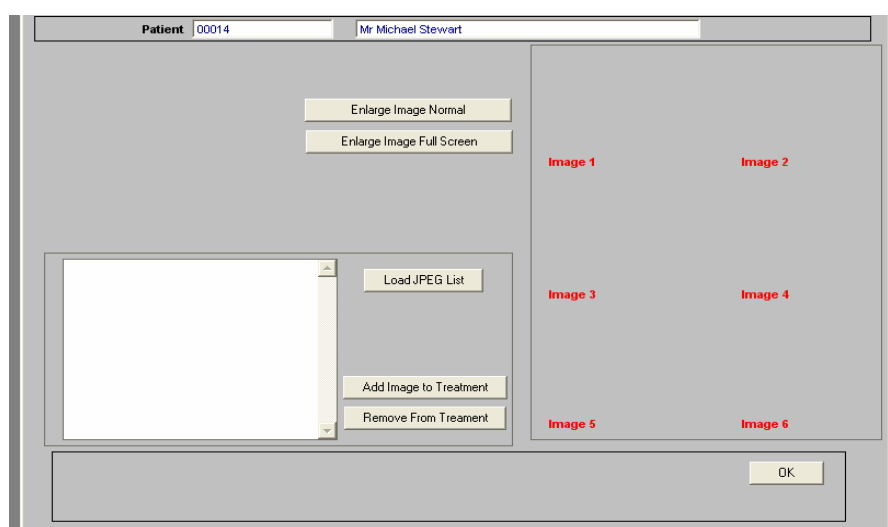
To create an assessment, click on the **Assessment** button and then on the **New Assessment /Orthotic Prescription** button. Double click on the type of assessment you wish to enter and add or change any details on the screen. Scroll down to reach the foot of the form, where you can print the form by clicking on the **Print** button. Click on the **Treatment** button to return to the basic treatment screen.

For details on how to set up further types of assessments, see Chapter 9 of the Advanced Manual.

Digital images

The Podiatry system allows you to record 6 images taken with a digital camera against each treatment record. These are stored on the computer in the JPEG directory specified by selecting “User Parameters” from the “Advanced Setup” menu (see Chapter 10 of the Advanced Manual).

These images are treated in the same manner as any images containing scanned in correspondence. Page 7-8 details how to copy or move files containing images of correspondence. The same process can be used to copy or move the files containing the images of camera views listed on this screen. Use the **Add Image to Treatment** button, instead of the **Add Image to Patient** button.



When you have finished recording these details, click on the **OK** button.

Ok

To save the details you have entered into the system, click on the **Ok** button. This reverts to the treatment history screen.

Basic treatment details

The information you have just added to the system using the basic treatment screen can be viewed in the Patient History Box on the treatment history screen.

Remember that the information will normally be locked after 1 calendar day. To edit your entries within the timescale, use the **Amend Treatment for 'date'** button. If you wish, you can also enter details about the same treatment using the detailed treatment screen.

When you are satisfied, click on the **Quit to Patient Record** button on the treatment history screen to return to the Patient Record screen for your patient.

DETAILED TREATMENT SCREEN

By using this screen to enter treatments, you ensure that standard wording is used. This can be monitored later to create reports and statistics.

To open the detailed treatment screen, click on the **Add Detailed Treatment** button on the treatment history screen. A new screen is displayed as shown below.

This screen contains the same fields and buttons as the basic treatment screen, with additional fields down the right hand side. These fields contain all the various types of diagnosis and treatment that have been inserted onto the system. More of these can be added, see Chapter 9 of the Advanced Manual.

Fields of detailed treatment screen

By default, the system enters the current date in the *Date* field. Ensure this is correct, or enter the actual date of the treatment.

Should you wish to specify a return date, type in the number of weeks until the next appointment in the *Return* field. The system will calculate and enter the exact date. The date then appears in the *App Due* field of the Patient Record screen.

If you have specified a podiatrist and clinic for this patient, the system enters these automatically in the fields *Podiatrist* and *Clinic* respectively. Otherwise, select these from the drop down menus which appear when you click in the field.

Entering detailed treatment information

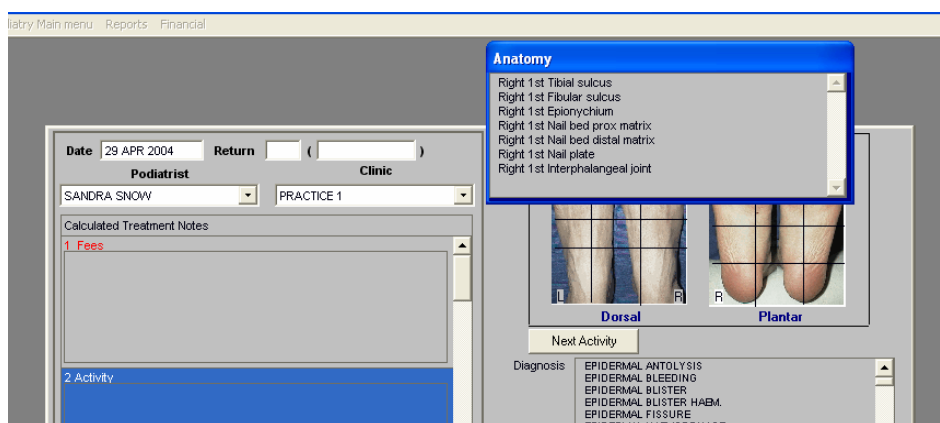
On any one detailed treatment screen you can enter up to nine separate diagnoses, with each one relating to a maximum of seven locations. Up to seven procedures can be performed, and up to seven medicaments/paddings/strappings can be used on each of the nine diagnoses.

You can amend the contents of the lists to suit your own purposes. Also as you select these items, the system automatically creates treatment notes, which can be amended similarly. See Chapter 9 of the Advanced Manual for information on how to alter the treatment lists and calculated notes.

Feet views

The dorsal and plantar views of the feet at the top right of the screen enable you to pinpoint the exact area of treatment. The views are used in conjunction with the diagnosis and treatment fields to specify the exact treatment given.

To start creating treatment particulars, left click in the location of the treatment on the appropriate foot picture. A pop-up menu headed *Anatomy* now appears, as below.



Using the menus

From this menu, select the precise location(s) of the lesion(s). If the same lesion covers several locations on that toe (or area) continue to click on each appropriate line in the list. When you have finished, move the cursor away from the box and the list will disappear. A red dot appears on the view of the foot in the location you selected.

Now select the diagnosis by placing the cursor over the *Diagnosis* menu field. To find the diagnosis you require, use the up and down arrow keys on the keyboard to move within the list, or drag the scroll bar at the right hand edge. Highlight the diagnosis and read the entry in the box on the left of the screen labelled *Activity* to check the entry is as you wish. Remove a wrongly selected item by selecting another option or by double clicking.

When you are happy with your selection, move the cursor down to the *Activity/Procedure* menu field. Here you can select up to seven entries against the diagnosis. If you select the wrong item, click on it again to remove it (if that line is already highlighted you will need to double click). Again, read the details entered in the box labelled *Activity* at the left of the screen to ensure you have selected the correct entries.

The next step is to select any materials used. Select these in the *Medicaments /Paddings/ Strappings* menu field in the same manner as for the *Activities* menu field. Again you can select up to seven entries. Check the details entered in the *Activity* box.

Finally, if required select an outcome from the *Outcome* menu field.

If the patient has several problems with their feet, click on the *Next Activity* button and enter the second and subsequent diagnoses in the same way.

Entering additional details

In the *Patients Description of Complaint* field, type in any summary you wish to save of what your patient has said. Likewise, you can type in any extra information in the *Additional Treatment Notes* field.

Saving the particulars

Remember that you will not be able to amend these details after the next calendar day, so check what you have entered before saving.

Click on the *Ok* button to log the particulars you have entered and return to the treatment history screen.

Buttons of detailed treatment screen

The buttons of the detailed treatment screen operate in the same way as those on the basic treatment screen, see Page 4-6.

Detailed treatment information

The information you have just added to the system using the detailed treatment screen can be viewed in the *Patient Treatment History* box on the treatment history screen.

Remember that the information will normally be locked after 1 day. To edit your entries within the timescale, use the *Amend Treatment for 'date'* button. If you wish, you can also enter details about the same treatment using the basic treatment screen.

When you are satisfied, click on the *Quit to Patient Record* button on the treatment history screen to return to the Patient Record screen for your patient.

CHAPTER 5 - THE APPOINTMENTS SYSTEM

INTRODUCTION

The appointments function within the Podiatry system enables you to book and organise appointment times for patients. It is based on diary sheets; which are tables of the appointment times available for each clinic and podiatrist, listing appointments booked for patients.

You will have already set up your original clinics and diary sheets as described in Chapter 2. Before booking an appointment, you also need to enter the patient's particulars on a Patient Record screen as described in Chapter 3.

The standard method of booking and cancelling appointments is to use the calendar diary. You select the date of the diary sheet to view from a calendar month and can view several days at a time. Buttons allow you to step through the diary sheets by weeks.

Alternatively you can use the daily appointments diary, which has been retained from an earlier version of the software for those already familiar with this method. This lets you view only one morning or afternoon session at a time.

All appointments booked for a patient can be seen from the Patient Record screen. Click on the *Appointment History* button for a list of all appointments, including those cancelled.

We recommend that you read this whole chapter to get an overall view of how the appointment system works, before starting to book appointments.

SET UP

Initial set-up

When you first started using live data, the Quick Set up routine (Chapter 2) helped you to specify your podiatrists and clinics. You may also have created the first four weeks of diary sheets.

New appointment sheets

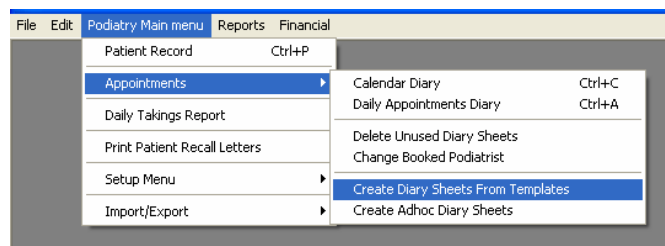
To book appointments beyond the first four weeks of diary sheets, you will have to create more diary sheets. There are two methods of doing this:

- Create weekly diary sheets. This is the standard method
- Create adhoc diary sheets. For sessions which are only booked occasionally.

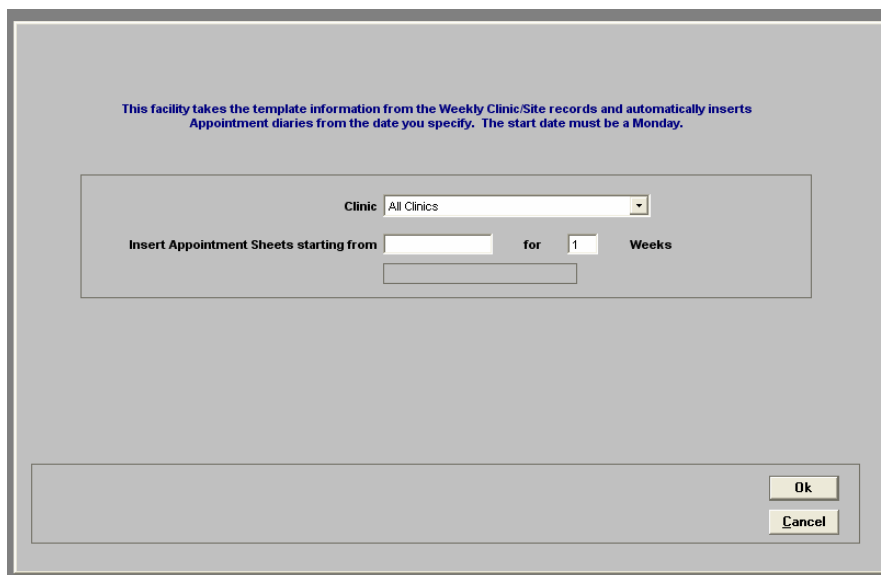
Create weekly diary sheets

For most customers this is likely to be the preferred method for creating diary sheets. It uses the template of appointment times specified in the quick set-up (see Chapter 2).

To create new sheets, select “Appointments” then “Create Diary Sheets from Templates” from the Podiatry Main menu as shown here. (To do this, click on the Podiatry Main menu, move the cursor down until “Appointments” is highlighted which brings up the sub-menu, and then move the cursor to the right and then down until “Create Diary Sheets from Templates” is highlighted and left click.)



This opens up the new screen below.



First, enter the date of the Monday from which the sheets are to start and press the TAB key. The box below shows the system's calculation of the start date you have entered. If this is not a Monday, change it.

Then enter how many weeks worth of diary sheets you wish to create.

Caution: During the first few weeks of using the system, please be careful not to insert diary sheets too far ahead. New users often find that they need to alter these sheets from their initial set-up as circumstances arise which they did not foresee. We would suggest that initially you insert diary sheets for a period to cover your normal advance appointment booking, plus 2 weeks. And then every 2 weeks insert another 2 weeks of diary sheets. When you are settled into using the system and you do not anticipate changes in clinic times or podiatrist availability then insert as far ahead as you need to.

Finally decide whether you wish to create sheets for all clinics or specify which. If all, just click on the **Ok** button. If you wish to specify a single clinic, click on the down arrow at the right of the field, select the one you want from the pop-up menu and click on the **Ok** button. Whichever route you use, a new screen appears as below.

Double Click on Line to amend details

Clinic: MPP/1 MEADOW PODIATRY PRACT. CHAIR 1
 Date: 16 NOV 1999
 Podiatrist: SS SANDRA SNOW

Clinic	Date	Day	Podiatrist	Start	Finish	AM/PM
MPP/1	1 NOV 1999	Mon	JS	09:00	12:00	A
MPP/1	1 NOV 1999	Mon	JS	13:00	17:00	P
MPP/1	2 NOV 1999	Tue	SS	13:00	18:00	P
MPP/1	8 NOV 1999	Mon	JS	09:00	12:00	A
MPP/1	8 NOV 1999	Mon	JS	13:00	17:00	P
MPP/1	9 NOV 1999	Tue	SS	13:00	18:00	P
MPP/1	15 NOV 1999	Mon	JS	09:00	12:00	A
MPP/1	15 NOV 1999	Mon	JS	13:00	17:00	P
MPP/1	16 NOV 1999	Tue	SS	13:00	18:00	P

Delete/Undelete Line Print List Ok
 Finish - Insert Diaries Finish - Do not Insert Diaries Cancel

The system has taken the information from the template for the clinic record called 'Meadow Podiatry Practice chair 1'. John Smith works at this clinic all day Monday and Sandra Snow works there on a Tuesday afternoon. The system has loaded a list of all of the Monday and Tuesday sessions from 1st November for 3 weeks.

You can make alterations before the diaries are inserted. To delete a morning or afternoon session, click on the line you wish to delete and then click on the **Delete/Undelete** button. The character 'D' appears at the end of the line indicating that it will not be inserted with the other diary sheets.

Alternatively, if another podiatrist is going cover one of these sessions you can change the diary sheet. To do, this double click on the line in question, enter the different podiatrist code in the *Podiatrist* field in top half of the screen, and press the RETURN key. Or, if you can't remember the code, type the character '?' and press the TAB key in the *Podiatrist* field which brings up a list of podiatrists, and double click on the required name.

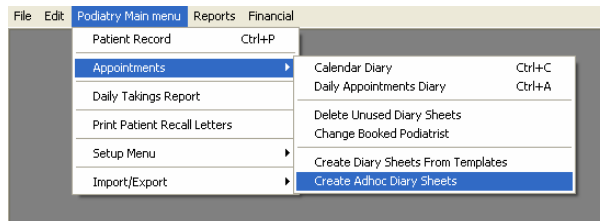
When the list of diary sheets is to your liking, you can use the ***Print List*** button to obtain a copy of your list. Printing the list to screen lets you see the whole list as a final check before you decide whether to insert the diary sheets or not.

To insert these diary sheets for use, click on the ***Finish - Insert Diaries*** button. If you do not want to insert them you can click on the ***Finish - Do Not Insert Diaries*** button.

Create ad hoc diary sheets

The purpose of this facility is to set up additional blank appointment sheets for extra sessions that do not fall into your usual weekly timetable. It allows you to select the Clinic where the appointments are to be inserted, the times for the first and last appointment of the session, and the dates for which the clinic will be available. Standard diary sheets are usually set up using the 'Create Diary Sheets from Templates' function.

To create ad hoc sheets, select "Appointments", then "Create Adhoc Diary Sheets" from the Podiatry Main menu as shown here.



This opens up the new screen below.

A dialog box for creating ad hoc diary sheets. At the top, 'Appointment Duration' is set to '20' in minutes. Below is a table with columns: 'Clinic', 'Podiatrist', 'First App', 'Break after Appointment', 'Continue', 'Finish', 'Insert Diaries from Date', 'To', and 'Daily/Weekly'. There are five empty rows for data entry. At the bottom right are 'Ok' and 'Cancel' buttons.

To set up extra sessions, first specify the length of appointment times. Here the default is 20 minutes.

Next enter the clinic and podiatrist in the corresponding fields. (Again if you can't remember the code, type ? in the field, then press the TAB key, to bring up a pop-up list and you can double click on your required option).

Then enter the times of the first appointment, any scheduled break, the restart after the break, and last appointment.

The next stage is to enter the dates for which the diary sheets will be produced. It is sensible to create just a few diary sheets at first, until you are familiar with the system and how to use it to your advantage.

Finally enter D or W in the last field of the row. Typing D will create the sheets for every working day of the period specified: typing W will enter one sheet per week within the period.

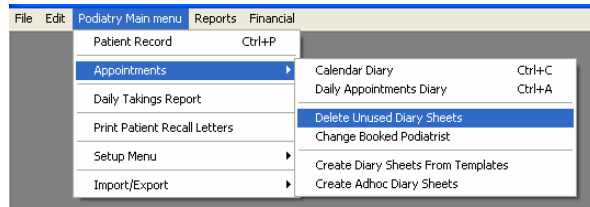
Create as many diary sheets as you need, using a different row for each. A separate line is needed for each morning and each afternoon session.

The example below shows one set of clinic sheets being created. Meadow Podiatry Practice (chair 1) will have diary sheets inserted for each working day between the 1st October and 31st October. The appointments will be every 20 minutes between 9:00 and 13:00 with a break after the 10:30 appointment. These appointment times can be edited on the diary sheets if necessary.

Appointment Duration		in minutes							
Clinic	Podiatrist	First App	Break after Appointment	Continue	Finish	Insert Diaries from Date	To	Daily/Weekly	
MFP/1	SS	09:00	10:30	11:00	13:00	1 OCT 1999	31 OCT 1999	[d]	
MEADOW PODIATRY PRACT. CHAIR 1		SANDRA SNOW							

Delete diary sheets

Should you inadvertently create diary sheets in error, you can delete them by selecting “Appointments” then “Delete Unused Diary Sheets” on the Podiatry Main menu.



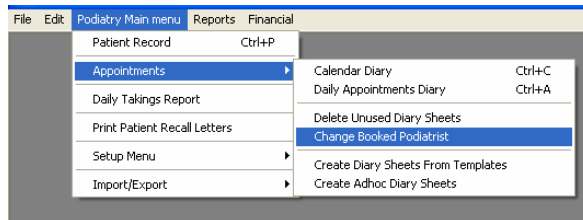
This opens a new screen where you can select the clinic and the dates whose sheets you wish to delete.



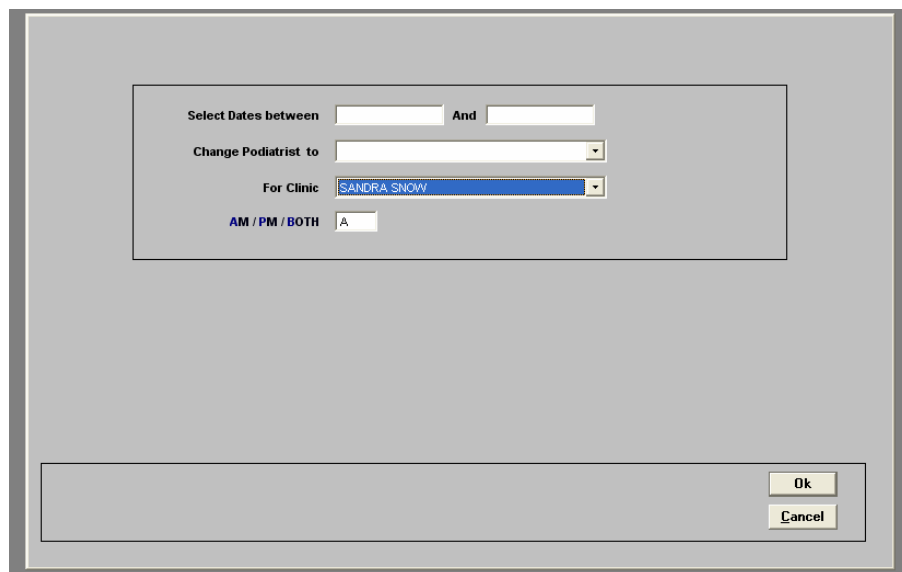
Click on the down arrow beside the field *Delete Diaries for Clinic* to select the clinic. Then enter the date range for the diary sheets to be deleted. The system will search through your selected diary sheets and delete them provided there are no appointments already booked.

Change booked podiatrist

There will be times when a podiatrist is allocated to a clinic that he/she cannot do so the clinic will be covered by another podiatrist. You can show this on the system by selecting “Appointments” then “Change Booked Podiatrist” on the Podiatry Main menu.



This opens up a new screen as below, where you can specify the start and end date of the period, the new podiatrist, the replaced podiatrist, and whether this is for just the morning of afternoon session, or both.



New clinics or podiatrists

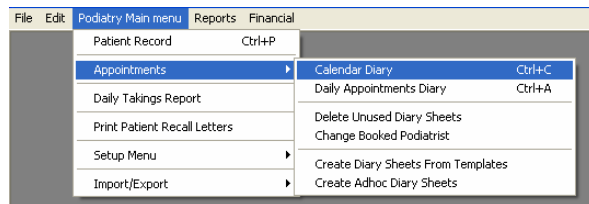
Chapter 8 details how to add podiatrists and clinics to your existing lists. It also explains how to assign holiday periods.

MAKE APPOINTMENTS USING THE CALENDAR DIARY

The calendar diary is likely to be the method you prefer to book appointments, since you can easily select dates, and change between them.

Before you can book appointments, you must have created clinics, inserted blank diary sheets, and also entered the patient's particulars on the Patient Record screen.

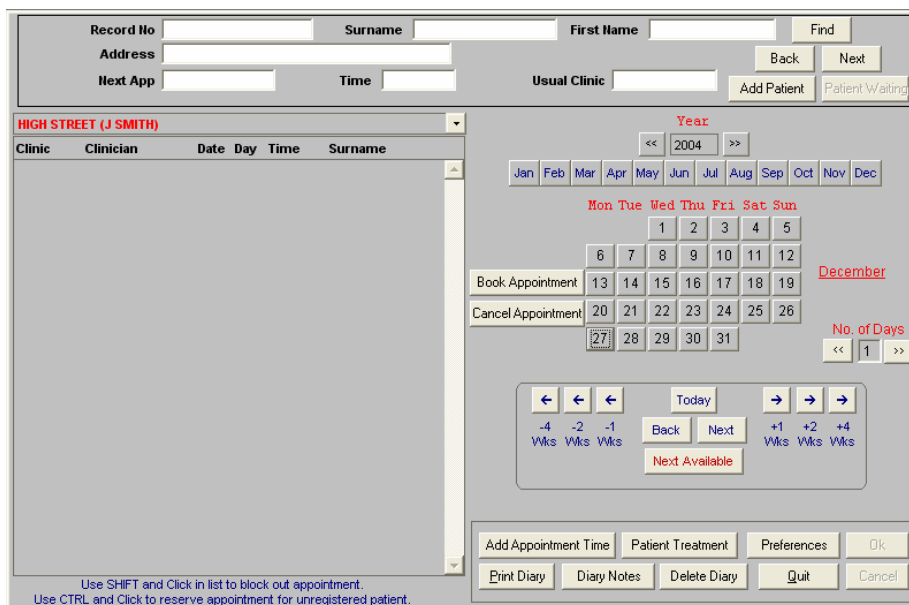
To open the calendar diary, on the Podiatry Main menu, select "Appointments" then "Calendar Diary". (You have to click on Podiatry Main menu, move the cursor down until "Appointments" is highlighted which brings up the sub-menu, and then move the cursor to the right until "Calendar Diary" is highlighted and left click.)



Alternatively, hold down the CTRL button and type C to open the calendar diary.

Layout of calendar diary screen

This opens up a new screen as below.



The four sections of the screen have different functions:

- Top – contain fields and buttons for finding and then displaying the patient's particulars
- Mid right – provides a calendar to select the date of the diary sheet (which will appear at mid left)
- Mid left - contains the diary sheet of appointment times for the day selected (it is blank on first use of live data), and the field for selecting the clinic
- Foot – contains buttons for additional functions.

Find patient

To use the calendar diary to book an appointment for a patient, first you have to bring up the patient's particulars. To do so, click on the ***Find*** button in the top section of the screen. The cursor moves to the *Record No* field, but you can also search using the *Surname*, *Address* or *Next App* fields. The easiest is probably to enter the patient's name in the *Surname* field. Then click on the ***Ok*** button at the foot of the screen.

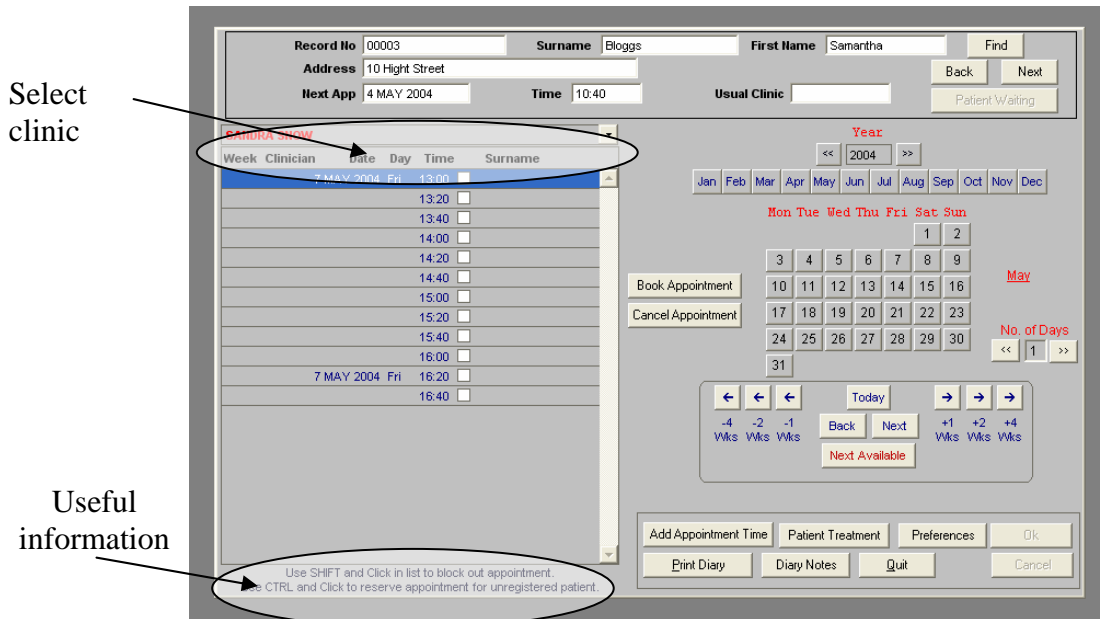
If your search has not found the patient you want, use the ***Next*** and ***Back*** buttons to select each patient in turn, or search again in a different field using the ***Find*** button.

Add patient

If you wish to make an appointment for a patient not yet on the system, the ***Add Patient*** button in the patient section of the screen acts as a short cut to the Patient Record screen. When you click on the ***Add Patient*** button, the screen changes to the Patient Record screen, ready for you to enter the patients details. Note that from here, the ***Ok*** or ***Cancel*** buttons will now bring you back to the calendar diary.

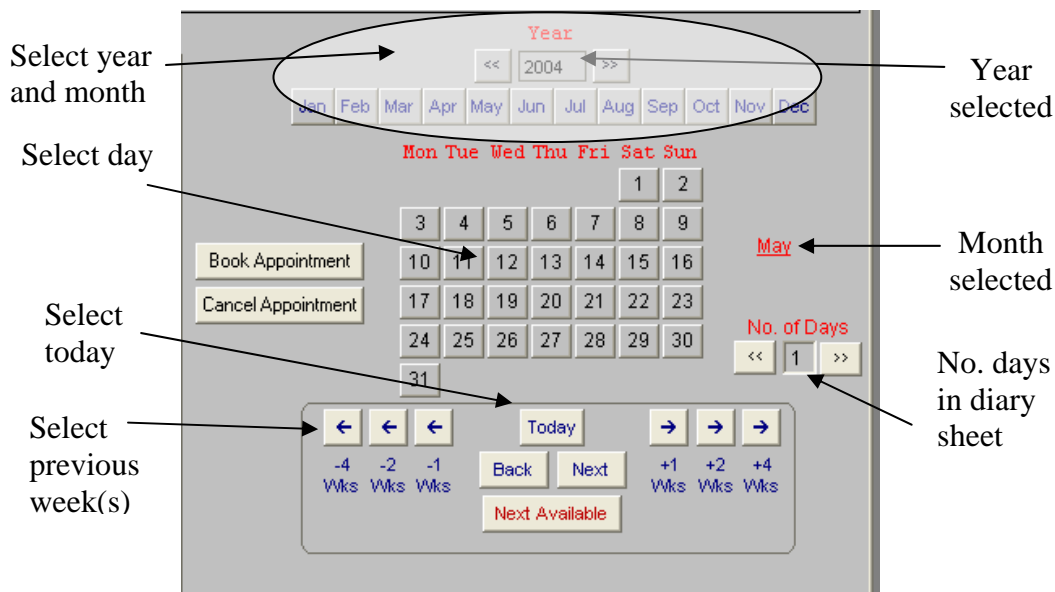
Select clinic

Next you must select to display the appointments for either a single clinic, or for all clinics. The centre left section of the screen contains the field for selecting the clinic. The clinic already selected above the diary sheet may be the one you want, in which case no action is needed. To select a clinic, place the cursor over the field and left click to obtain a pop-menu and then left click on the required clinic, or the "Show all clinics" option. The screen now shows a diary sheet as below.



Calendar selection

The centre right section of the screen contains the calendar from which you specify the year, month and date of the diary sheet (which is to the left of the screen). It consists of buttons with which you select the day for the appointment as below.

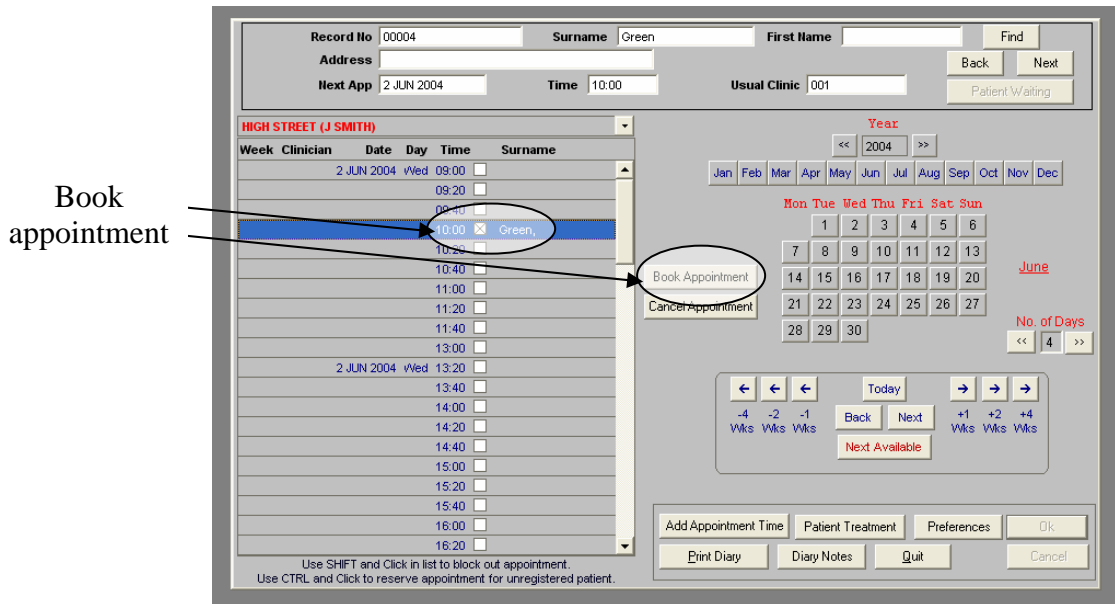


Use the various buttons in this section of the screen to select the date of the appointment. The easiest method is probably to click on the month and then the day (and ensure that the year is correct). This calls up the diary sheet for the day of the appointment.

Book appointment using calendar diary sheet

The diary sheet, for the date selected in the calendar section, and the clinic(s) selected in the field above, should now be in the centre left section of the screen. If there is no diary sheet on screen, the selected clinic is not open on the date specified. Click on the *Next* button, in the calendar section, or select a working date.

Now you can make the appointment. Click on the *Book Appointment* button in calendar area, move the cursor to the empty square to the right of the required appointment time in the diary sheet and left click in the square.



A cross appears in the square beside the time, and the name of the patient appears in the *Surname* column. Additionally, the *Next App* box in the patient section of the screen is updated to show this new appointment.

Making further appointments

To make another appointment for the same patient, select the date of the appointment in the calendar section of the screen by clicking on a date, or move to a date in 1, 2 or 4 weeks time using the buttons below the calendar.

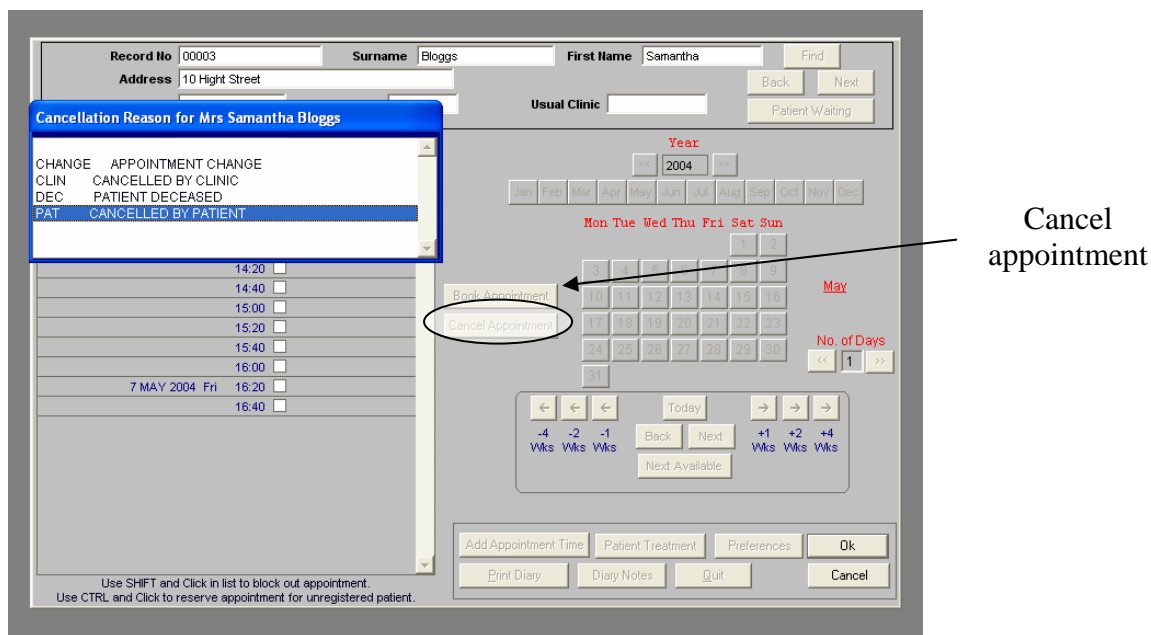
Then click on the *Book Appointment* button and select the time. A pop-up screen tells you that you have already booked an appointment for that patient, and gives you the option to cancel the previous appointment. (This feature can be switched off, by selecting "User Parameters" from the "Advanced Setup" menu, see Chapter 10 of the Advanced Manual for details).

To book an appointment for a different patient, select the patient using the *Find* or *Back* and *Next* buttons in the patient section of the screen. Then select the clinic if not already correct, select the date, click on the *Book Appointment* button and select the time.

Cancel appointments

There are two ways to cancel an appointment using the calendar diary.

The first way to cancel is to use the **Cancel Appointment** button. Use the calendar to display the diary sheet for the day with the appointment you wish to cancel. Then click on the **Cancel Appointment** button, and move the cursor to the appointment you wish to cancel and left click. A pop-up box appears that asks ‘Are you sure you wish to cancel this appointment for patient’. If you click on the **Yes** button to cancel, a further box appears with the list of reasons for cancelling, as below.



Double click on the reason for cancelling. The screen reverts to the calendar view, and the appointment is cancelled and made available for another patient.

You can alter the list of options if you wish, see Page 8-5 for details.

The second way to cancel an appointment is to make a further appointment for the patient. On doing this, the system prompts you with the date, clinic and time of the current appointment and asks if you wish to cancel this current appointment. Again you will be asked to select the reason for cancelling: double click on the list to return to the calendar diary.

If you do not want to use this facility, it can be switched off. Select ‘User Parameters’ on the ‘Advanced Setup’ menu and set the 'Prompt if patient has two Appointments' section to NO (see Chapter 10 of the Advanced Manual).

Other features of the calendar diary

Booking a double appointment

To book a double appointment (or longer), select the patient, clinic and date as normal and click on the **Book Appointment** button. Then click and hold down the left button of the mouse on the first appointment slot, and drag the mouse so that the cursor moves down to the second (or last) appointment slot. Now release the left button of the mouse. The first slot will now show the name of the patient in the *Surname* field, and the second (and any subsequent) slot will contain the message 'Same Patient'.

Should you decide later that a double appointment is not needed, you have to cancel both slots and re-enter the first.

Blocking out appointments

If you wish some appointment slots to be left free, you can reserve these appointment times. The notes at the foot of the diary sheet section state that there are two ways of reserving appointment times:

- Hold down the SHIFT key and then click on the appointment line you wish to block out. The system inserts the message 'Do not book'. (This message can be altered using the **Preferences** button at the bottom right of the screen.)
- Hold down the CTRL key and then click once on the appointment line you wish to block out. A pop-up screen appears with a field *Appointment Notes* where you can enter your own reason. This is a useful way of reserving appointments for a patient without having to register them first.

Note that if the appointment you are trying to block out is already highlighted, you will have to double click instead.

To cancel either of the above, and make the appointment time available, use SHIFT and click.

Finding patient's particulars

If the diary sheet on the screen has an appointment for a patient and you wish to bring up their particulars, click on their name; this brings up their details automatically. This is a useful facility if you have a number of people with the same surname booked at the same clinic and you wish to ensure you have the correct patient.

Swapping between screens

You can swap between the Patient Record screen and the calendar diary screen without losing the patient or date selected. Instead of using the **Quit** button to close the screen and then the Podiatry Main menu to select the new screen, use the Podiatry Main menu while the original screen is still open.

However, it is faster to use the CTRL key to change screens:

- CTRL + P - opens the Patient Record screen
- CTRL + C – opens the calendar diary
- CTRL + A - opens the daily appointments diary.

Patient Waiting

The ***Patient Waiting*** button can be used to show that a patient has entered the waiting room and is waiting to see the podiatrist.

A receptionist with the Podiatry system can bring the patient details on screen, and click on ***Patient Waiting***. If the podiatrist has the diary sheet for the day displayed on their computer, the patient's name appears in red to show that the patient has arrived. The Podiatrists computer will be updated after they reload the calendar diary or click on the *Today* button. To undo it, click on the button again.

Diary sheet

If this section is blank either:

- The selected clinic is not open on the date specified. Click on the ***Next*** button, in the calendar section, or select a working date.
- This is the first time you are using the system, and you need to select a clinic.

Details of buttons on calendar diary screen

Calendar section

The buttons at the foot of the section are for moving easily through the calendar:

- ***Today*** selects the diary sheet for the current day
- ***Back*** and ***Next*** bring up the diary sheet for the previous, or next working day
- **+ Wks** and **- Wks** step through the diary sheets, jumping by one, two or four weeks at a time (eg **+2 Wks** moves to the diary sheet a fortnight on from that currently selected)
- ***Next Available*** moves to the diary sheet for the next day with a free appointment time.

These buttons can be useful when re-booking a patient who has just been treated. Use the ***Today*** button to find the current appointment. If the patient's particulars are not on the screen, click on their name in the *Surname* box of the diary sheet. Then click on the **+1 Wks** button (or the **+2 Wks** or **+4 Wks** button) to move to the date for the next appointment.

The arrow buttons (<< and >>) beside the *No. of Days* box determine how many days worth of diary sheets appear at one time on the mid left of the calendar diary screen. Clicking on the >> button increases the number by one. The new number of days does not appear until you select a new date.

Add Appointment Time

If you need to make an appointment outside normal working hours or wish to split one appointment into two shorter ones, first select the day of the appointment then click on the **Add Appointment Time** button. A pop-up screen appears in which you can specify the time of the appointment. This time is then added to the diary sheet and you can book a patient against it.

Patient Treatment

The **Patient Treatment** button can work in two different ways. The default action is to open up the treatment history screen for the patient selected. From here you can enter your treatment details and then quit back to the diary. However, there is an option from the **Preference** button which allows you to change this. By changing the *Patient Treatment* option to NO, the programme will instead ask you if the patient has attended and then automatically create a treatment record.

Preferences

This button opens a new screen which allows you to alter some of the parameters which effect how the screen looks. You can alter the colours and the frequency in which the date appears in the diary sheets. They are currently set to appear after every 10 appointments. If this were changed to 1 the date would appear on every line.

You can also alter the “Do Not Book” Message here, by typing the new message in that field. This is the message that appears against an appointment time when you hold down the SHIFT key and left click in the square. If this message is unique for a particular occasion, remember to change it back afterwards to your standard message.

Print Diary

The *Print Diary* button opens a new screen as below.

Print Appointments for Clinic: HIGH STREET (J SMITH)

Podiatrist:

For Dates Between: 4 OCT 2004 & 4 OCT 2004

Select AM / PM or Both: B

Leave Clinic or Podiatrist blank to select ALL

Ok

Cancel

This screen lets you select which diary sheets to print and the date range. You can also select the podiatrist to print for and/or the clinic, as well as an option to select AM, PM or Both.

For instance you could print all diary sheets for a particular podiatrist for one week, or for an individual clinic. If you leave the podiatrist and the clinic blank the system prints out all the diary sheets for the period between the selected dates.

When you have made your selection, click *Ok*. Choose where to print and click *Ok*, then choose the sort order by clicking in *Yes* or *No*. A separate sheet is created for each day in the range selected. Note that if you have printed to screen, you will have to close each sheet by clicking on the *X* in box at the top right of the print sheet.

You are now asked if you wish to print again. Click on *No* to return to the calendar diary.

Diary Notes

This button displays a memo screen for the selected clinic allowing you to enter any comments or reminders for the day's clinic.

Delete Diary

The Delete Diary button allows you to delete the diary sheet for a complete day, only if no appointments have been made for that day. This could be useful if any diary sheets are inserted in error.

Quit, Ok and Cancel

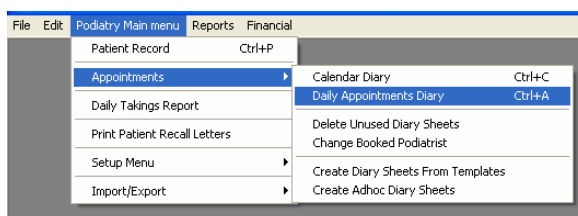
These buttons operate as normal. Clicking on *Quit* closes the calendar diary and reverts to the podiatry menus.

MAKE APPOINTMENTS USING THE DAILY APPOINTMENTS DIARY

The daily appointments diary is a second way of booking and cancelling appointments. This shows one day at a time and also provides a means of recording treatments.

Before you can book appointments, you must have created clinics, inserted blank diary sheets, and also entered the patient's particulars on the Patient Record screen.

To open the daily appointments diary, on the Podiatry Main menu, select "Appointments" then "Daily Appointments Diary". (You have to click on Podiatry Main menu, move the cursor down until "Appointments" is highlighted which brings up the sub-menu, and then move the cursor to the right and down until "Daily Appointments Diary" is highlighted and left click.)



Alternatively, hold down the CTRL key and type A to open the appointments diary.

Layout of daily appointment diary screen

This brings up a new screen as below.

The screenshot shows a software interface for a daily appointment diary. At the top, there are input fields for 'Record No', 'Surname', and 'First Name', followed by a 'Find' button. Below these are fields for 'Address', 'Next App', 'Time', 'Target Appointment', 'Usual Clinic', 'Last Treated', and 'Category', with 'Back', 'Next', and 'Patient Waiting' buttons. The middle section is titled 'Appointments for Clinic' and includes a 'Podiatrist Ref' field and a 'Date' field. Below this is a grid with three columns: a left column of checkboxes, a middle column with a '(AM)' label, and a right column of checkboxes. At the bottom, there is a row of numbered tabs from 1 to 10, and a control panel with buttons for 'Appointment', 'Find', 'Next', 'Back', 'Delete', 'Quit', 'Ok', 'Print', 'Clinics', 'Find Wks', 'Today', 'Notes', 'AM', 'PM', and 'Cancel'.

The three sections of the screen have different functions:

- Top – contains fields and buttons for finding and then displaying the patient's particulars. These are as on the calendar diary, with additional boxes containing *Last Treated* and *Category*
- Middle – contains the diary sheet of appointment times for the morning or afternoon selected
- Foot – contains the buttons for selecting the date and clinic, making the appointment and additional functions.

Before you can book an appointment you must first of all select the patient, the clinic for the appointment, and the date it is required, as for the calendar diary.

Find patient

To bring up the patient's particulars, use the **Find**, **Next** and **Back** buttons on the top right hand corner of the screen. (This is the same method as when using the calendar diary.)

Select clinic and date

The next stage is to select the clinic and then the date. The clinic already displayed above the diary sheet may be the one you want, in which case no action is needed. To change or enter the clinic, click on the **Clinic** button at the foot of the screen, this opens a pop-up menu. Highlight which clinic the patient is to attend, then click on **Continue**.

Alternatively, you can hold down the CTRL key and select up to six of your regular clinics from the pop-up menu. These then appear greyed out at the foot of the diary section and can be used to select the clinic required. Also, there is an option to specify up to 10 groups of clinics, see Page 8-4.

To select the date, click on the **Find** button at the foot of the screen. The cursor moves to the **Date** field, where you can enter the date of the appointment. Then click on **Ok**. If the system cannot find that date (because there are no diaries inserted for that clinic on that date), it will either find the next available date, or, if there are none, display the message 'No Record found'.

Click on the **AM** or **PM** button to select the required session.

The screen now shows the diary sheet for the morning or afternoon of the specified clinic and date as below.

The screenshot displays the following information:

- Record No:** 00002
- Surname:** Bloggs
- First Name:** Fred
- Address:** 19 Hight Street
- Next App:** 4 MAY 2004
- Time:** 10:20
- Target Appointment:** [Empty]
- Usual Clinic:** SJ[
- Last Treated:** 3 MAY 2004
- Category:** [Empty]
- Buttons:** Find, Back, Next, Patient Waiting

Appointments for Clinic: SJ[ST JOHNS (MACDONALD)

Podiatrist Ref: [Empty]

Date: 18 MAY 2004 (Tuesday)

Session: (AM)

09:00	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
09:20	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
09:40	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
10:00	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
10:20	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
10:40	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
11:00	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
11:20	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
11:40	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

Calendar: 1 2 3 4 5 6 7 8 9 10
SJ[

Control Panel: Appoint, Find, Next, Back, Delete, Quit, Ok, Print, Clinics, Find Wks, Today, Notes, AM, PM, Cancel

The above screen shows the diary sheet for the morning of 18/5/2004. St Johns is the selected clinic and the patient is Fred Bloggs.

Book appointment using daily diary sheet

Now you can book an appointment for the patient. Click on the **Appoint** button at the foot, move the cursor to the empty square to the right of the required appointment time in the diary sheet and left click in the square.

The screenshot displays a software window for patient management. At the top, there are input fields for 'Record No' (00002), 'Surname' (Bloggs), and 'First Name' (Fred), with a 'Find' button. Below this, 'Address' (19 Hight Street), 'Next App' (4 MAY 2004), 'Time' (10:20), 'Target Appointment', 'Usual Clinic' (SJC), 'Last Treated' (3 MAY 2004), and 'Category' are visible. A 'Patient Waiting' button is also present. The main section is titled 'Appointments for Clinic' (SJC) and 'ST JOHNS (MACDONALD)'. It shows a 'Podiatrist Ref' field, a 'Date' field (18 MAY 2004, Tuesday), and a grid of time slots. The 09:20 slot is selected, indicated by a cross and the name 'Bloggs_F' in the right-hand column. At the bottom, there are buttons for 'Appoint', 'Find', 'Next', 'Back', 'Delete', 'Quit', 'Ok', 'Print', 'Clinics', 'Find Wks', 'Today', 'Notes', 'AM', 'PM', and 'Cancel'.

A cross appears in the square box and the patient's surname is displayed in the right-hand column. Additionally, the *Next App* box in the patient section of the screen is updated to show this new appointment.

Making further appointments

To make another appointment for the same patient, use the **Find** or **Find Wks** button at the foot of the screen to select the required day. Next, select the morning or afternoon session using the **AM** and **PM** buttons.

Then click on the **Appoint** button and select the time. A pop-up screen tells you that you have already booked an appointment for that patient, and gives you the option to cancel the previous appointment.

To book an appointment for a different patient, select the patient using the **Find** or **Back** and **Next** buttons in the patient section of the screen. Then select the clinic if not already correct, select the date, click on the **Appoint** button and select the time.

Cancel appointments

There are three ways to cancel an appointment using the daily appointments diary.

To cancel an appointment outright without booking another one, just repeat the actions made to book the appointment. In other words, click on the **Appoint** button, and then click over the cross in the square next to the patient's surname. If the appointment you select is not for the patient whose particulars are displayed at the top of the screen, a pop-up screen will ask you to confirm this. If you select **Yes**, a pop-up menu appears with the list of reasons for cancelling: double click on the reason for cancelling. The screen reverts to the daily view, and the appointment is cancelled and made available for another patient.

The second way of cancelling appointments is suitable for when you have found the patient but are not currently displaying the appropriate diary sheet. In this case, simply double click on the *Next App* box on the patient record part of the screen. The system will find the clinic and date for you and ask if you wish to cancel the appointment.

The third method of cancelling an appointment is to make a further appointment for the patient. On doing this, the system prompts you with the date, clinic and time of the current appointment and asks if you wish to cancel this current appointment. If you do not wish to cancel, the system will now have two appointments booked for that patient. If you wish to cancel, click **Yes** and again you will be asked to select the reason for cancelling: double click on the list to return to the daily sheet and the system will cancel the first appointment.

If you do not want to use this last facility it can be switched off by setting the Prompt if Patient has two Appointments' section to NO in the User Parameters screen (see Chapter 10 of the Advanced Manual).

You can alter the list of reasons for cancelling if you wish, see Page 8-5 for details.

Other features of daily appointment diary

Booking variable length appointments

To give a patient two consecutive appointment slots, click on the **Appoint** button, and hold down the SHIFT key when you click on the empty square beside the first appointment slot. To give the patient three appointments slots, hold down both the CTRL and the SHIFT key and click on the first slot of the appointment.

Changing appointment length

You can change the length of a single appointment, on one day only, by double clicking on that appointment time (not the box beside the time). A pop-up field appears where you can enter the new duration of the appointment.

Blocking out appointments

If you wish some appointment slots to be left free, you can reserve these appointment times. To do this, click on an appointment box with the right mouse button (without clicking on **Appoint** first). The system enters the 'Do Not Book' message in the surname column. To remove it, right click on it again.

Swapping between screens

You can swap between the Patient Record screen and the daily diary screen in the same way as the calendar diary by using the control keys (see Page 5-13).

Patient Waiting

The **Patient Waiting** button operates in the same way as with the calendar diary. The button is only available when you are looking at an appointment diary for today's date.

Record of contacts

The daily appointments diary provides a crude but extremely quick way of recording face to face contacts. It is ideal for those who do not want to record any treatment details on the computer, but only the fact that the patient was treated. Simply double click on the patient's surname (next to the appointment time on the diary sheet). The system asks if you are sure the patient has attended. Click on **Yes** and a contact will be inserted automatically including details of the date, clinic, and the podiatrist.

Guidelines

When the diary sheet on the screen has an appointment for a patient and you wish to bring up their particulars, click on the cross next to their surname. This brings up their record automatically, provided you have not just clicked on the **Appoint** button.

If you are using the system on a network, do not click on **Appoint** and then leave without completing the appointment. This creates Padlocks on other user's computers stopping them from using the system.

Should you use the system on a network, there is an option on the "User Parameters" screen of the "Advanced Setup" menu to change the interval at which the diary information on your screen is updated when other users are also booking appointments. See Chapter 10 of the Advanced Manual.

Some practices need to record a short description on the appointment to show what kind of appointment the patient needs. The User Parameters screen has a field called *Allow Appointment Notes*. Set this to YES to switch on this function. Again see Chapter 10 of the Advanced Manual.

Details of buttons on daily appointment diary screen

Appoint

The **Appoint** button is used to book appointment times after the clinic, date and patient have been selected. Click on the **Appoint** button, then click on the square beside the appointment slot.

Find

Clicking on the **Find** button moves the cursor to the *Date* field, to allow you to enter the date of the diary sheet.

Next and back

The **Next** and **Back** buttons bring up the diary sheet for the same session (morning or afternoon) of the next working day or the previous working day.

Delete

This button can be used to delete an individual diary sheet provided there are no appointments already booked. If you need to delete a block of diary sheets, select “Appointments” then “Delete Unused Diary Sheets” on the Podiatry Main menu.

Print

The **Print** button operates in the same way as *the Print Diary* button on the calendar diary sheet (see Page 5-14). You can change the report to show all the appointment slots with patient details for those that have been booked. This is done by selecting “User Parameters” on the “Advanced Setup” menu and changing *Diary Sheet Selection* to 2. (see Chapter 10 of the Advanced Manual).

Clinics

The **Clinics** button is used to select the clinic for which the diary sheet is to be displayed.

It can also be used to select a quicker method of changing clinics. Click on the ***Clinics*** button to display the list of all the clinics. From this, you can select up to six by holding down the CTRL key and clicking on each clinic. Then, click on the ***Continue*** button and the system returns to the daily appointments diary with your six clinics displayed in the grey rectangles above the first row of buttons. Now, to change clinics simply click on the grey rectangle representing the clinic you wish to use. These clinics will remain until another set is selected.

You can also define groups of clinics using the “Setup menu” from the Podiatry Main menu. See Page 8-4 for more details.

Find Wks

This facility is useful if you tend to book further appointments on the day a patient is treated. Often patients would need to return in 'X' weeks time. Instead of having to work out this date yourself, the system automatically calculates the date and displays the diary sheet for that day.

Today

Click on this button to return you to the diary sheet for today's date.

Notes

The ***Notes*** button allows you to enter any notes or reminders about that day.

AM and PM

These buttons toggle between the morning and afternoon sessions.

CHAPTER 6 – ACCOUNTING SYSTEM

INTRODUCTION

Most aspects of the accounting system are covered in the Advanced Manual. However, you may wish to investigate the following three features:

- Automatic invoicing using the **Fees** button on the treatment screens
- Checking the status of a patient's account
- Obtaining a report of the daily takings.

AUTOMATIC INVOICING

The system is set up to allow you to enter treatment costs and create an automatic invoice when you enter the treatment details. Each treatment can be invoiced separately or several can be combined into one invoice.

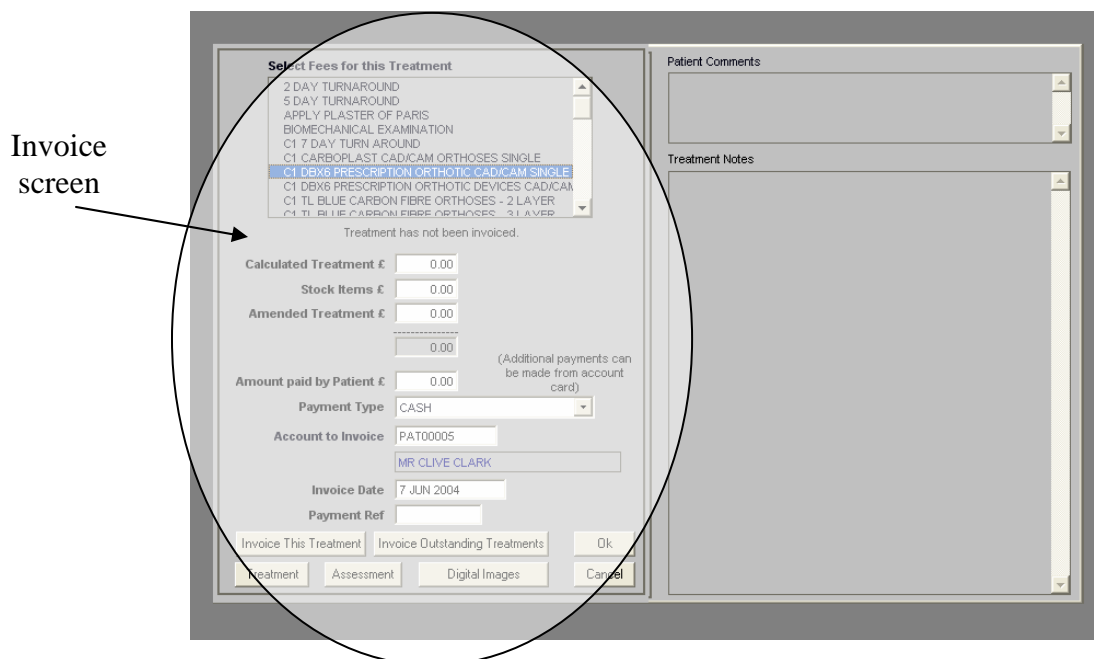
To obtain the costs screen, you need to find the Patient Record screen for the patient, and click on the **Treatments** button. Then enter the details of the treatment using either of the two methods available; adding basic treatment notes (where you type in any treatments given), or adding detailed treatment information (where you select from lists of treatments and medications). Chapter 4 details how to do this.

Or if you have already entered the treatment details, find the Patient Record screen for the patient, and click on the **Treatments** button. Then select the treatment from the list in the *Patient Treatment History* box on the treatment history screen. Now click on the **Amend Treatment for 'date'** button.

Whichever method you have used, there is a **Fees** button at the foot of the screen. The detailed treatment screen is shown below, with the **Fees** button circled.

The screenshot displays a software interface for entering treatment details. At the top, it shows the date (7 JUN 2004), a return button, and a clinic selection dropdown. Below this, the podiatrist's name (SANDRA SNOW) and the clinic name (HIGH STREET (J SMITH)) are displayed. The main area is divided into sections for 'Calculated Treatment Notes' (containing '1 Fees'), '2 Activity', 'Patients Description of Complaint', and 'Additional Treatment Notes'. On the right side, there are two image windows labeled 'Dorsal' and 'Plantar' showing foot images. Below the images is a 'Next Activity' button and a list of medical options categorized by Diagnosis, Activity/Procedure, Medicaments/Strappings, and Outcome. The 'Fees' button is circled in red at the bottom left of the screen.

Clicking on the *Fees* button (from either method of adding treatment information), brings up the screen below. The right hand section of the screen differs for the two methods, but the left-hand section is the invoice screen.



Determine costs

The costs are in two parts, the cost of the treatment and then the cost of any stock items sold to the patient. For each, the system will calculate a cost but allow you to change it.

Treatment fees

A preset list of a range of fees for treatments is given in the menu at the top of the screen. Select which treatment type is applicable by highlighting and clicking on the list. Seven items on the list can be selected at one time; an asterisk is displayed beside each one selected. To deselect an item from the list, highlight it and click again.

The fees for all treatment types selected are added together and entered in the *Calculated Treatment* box.

The entries and costs of the corresponding fees in the preset list can be updated using the “Treatment Related Setup Menu” described in Chapter 9 of the Advanced Manual.

Stock items

The second part of the calculation is for any stock items which are sold to the patient. Initially, stock items are not listed in the menu at the top of the screen. These must be entered using the “Treatment Related Setup Menu” described in Chapter 9 of the Advanced Manual. Once you have entered your list, and marked the items as stock, they will be available on the menu at the top of the fees screen. Any of these items you select now from the menu will be totalled in the *Stock Items* box.

Amended treatment costs

The system provides the total of the treatment fees and stock costs in the *Amended Treatment* field. However, you can alter this total as you wish. Simply type the required value in the field.

VAT

Most podiatrists are not VAT registered which keeps things simple.

If you are VAT registered, your treatments may be VAT exempt and therefore do not include VAT. The stock items will include VAT if you are VAT registered. In these instances you must calculate your stock price as being VAT inclusive.

You don't need to understand the VAT calculations, the system will do it for you. However, you do have to tell the system what your VAT rates are, see Chapter 7 of the Advanced Manual for entries on the account parameters screen. Also if you are VAT Registered and VAT exempt for treatments you must tell the system this on the user parameters screen, see Chapter 10 of the Advanced Manual. Otherwise, if you are VAT registered the treatment price will also include the VAT.

Determine payment value

The *Amended Treatment £* field shows the total cost of the treatment and stock that is to be paid. There are three options for payment:

- Full amount paid
- Partial amount paid on the spot, the remainder to follow
- No payment received, invoice to be sent.

Full amount paid

Enter the amount paid by the patient in the *Amount Paid by Patient £* field and click in the *Payment Type* field to select the method of payment. This is all you need to do before creating an invoice.

Partial amount paid

If the patient does not pay the full amount, enter the actual amount paid in the *Amount Paid by Patient £* field. The remainder will remain outstanding on the patient's account. Click in the *Payment Type* field to select the method of payment.

To receive the remainder later, use the **Account Card** button on the Patient Record screen, and then click on the **Receive Payment** button, as described on Page 6-7.

No payment

Leave the *Amount Paid by Patient £* field at 0.

Invoice

The number in the *Account to Invoice* field defaults to the patient's record number from the Patient Record screen, but can be changed if the fees are to be directly invoiced to an insurance company.

To create an invoice, click on the **Invoice This Treatment** button. The response from the system differs at this point, depending on what you have entered in the *Amount Paid by Patient £* field.

- If you have entered any value in the *Amount Paid by Patient £* field, you will be asked to confirm that you wish to invoice the treatment. Click on the **Yes** button.
- If you have left the *Amount Paid by Patient £* field at zero, the system will warn you that "no payment has been entered. If you want to enter a payment select No to Invoice Treatment. Click OK to continue". So click on the **OK** button. Then at the next prompt "Are you sure you want to invoice this treatment" click on **Yes**. (The **No** button is provided should you have forgotten to enter any amount paid before creating an invoice, rather than deliberately not entered an amount).

Next you will be asked if you wish to print either an invoice or a receipt. If you click on **Yes**, a further screen will appear as below.

The screenshot shows a software interface for creating an invoice. A dialog box titled "Invoice Formats" is open, displaying a list of invoice types. The selected option is "TREATMENT INVOICE 1". Below the dialog box, the main application window shows a summary of treatment costs: "Calculated Treatment £ 15.00", "Stock Items £ 0.00", "Amended Treatment £ 20.00", and "Amount paid by Patient £ 20.00". The "Payment Type" is set to "CASH". A note states "(Additional payments can be made from account card)". The background window also shows a "Select F..." dropdown menu and a "Next A" button.

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In other words if you went into the sales ledger reports, this invoice would be shown as being worth £27.00 with £12.00 still outstanding. The patient's screen would also show that he still owed £12.00.

The updating which takes place on the nominal ledger and analysis codes is as follows:

- 1100 Debtors £ - 12.00 (i.e. £27 (from invoice) - £15 = 12.00)
- 1200 Bank Account £ 15.00

The 1100 - debtors analysis code would originally be updated with £27 but then immediately reduce by £15 because the patient paid some of the bill. The bank balance is increased because you now have an extra £15 in the bank.

PATIENT ACCOUNT CARD

You can use the Patient Record screen to get a quick check of a patient's account, and to view the latest transactions. The Patient Record screen has an *Account Balance* box and an *Account Card* button (as circled below).

The screenshot displays a patient record form for 'Mrs Bloggs, Samantha'. The form includes fields for personal details (Title, Surname, First Name(s), Address, Post Code, Telephone, Email Address, Weight, Height, Insurance Ref, Allergies, Comments or GP Info), medical history (Podiatrist, Registered Clinic, Occupation, Referral, Registered GP Practice, GP, Patient Category, Category 2, Previous Medical History), and appointment information (Next Appointment, Date of Referral, First Treated, Last Treated, App Due, Died). The 'Account Balance' is shown as £ 20.00, and an 'Account Card' button is circled. The bottom of the screen features navigation buttons: Add Patient, Edit, Find, Find / List, Next, Back, Delete, Quit, Ok, Treatments, Appointment History, View Scanned Images, Letters History, Print, >Page>, and Cancel.

The *Account Balance* box shows the outstanding balance owed by the patient.

When you click on the **Account Card** button a new screen appears as below, showing all transactions. This screen is also available from the Financial menu, by selecting “Sales Menu” then “Customer/Patient Accounts”. For further details see Chapter 4 of the Advanced Manual.

The screenshot shows the Account Card interface for customer PAT00003, MRS SAMANTHA BLOGGS. The financial summary on the right indicates a Current Month total of 20.00, with previous months at 0.00, and a Balance of 20.00. The Sales Ledger table below shows a single transaction on 8 JUN 2004 for Podiatry Treatment, with a Net £ of 20.00, VAT £ of 0.00, and a Total £ of 20.00. The interface includes various navigation buttons such as 'Add Customer', 'Edit', 'Find', 'Next', 'Back', 'Delete', 'Quit', 'Ok', 'Sales Invoice', 'Receive Payment', 'Reprint Invoice', 'Print Ledger', 'List Customers', 'O/B', and 'Cancel'.

Ref	Date	Type	Description	Net £	VAT £	Total £	Balance £
8	8 JUN 2004	Invoice	Podiatry Treatment	20.00		20.00	20.00

Receive Payment button

If a partial payment has been recorded for a treatment, you can't use the **Fees** button from the treatment screen to record the completion of the payment. Instead, you have to use the **Receive Payment** button on this account card screen instead. A new screen is displayed as below.

This screenshot is identical to the previous one, but the 'Receive Payment' button in the bottom navigation bar is highlighted in blue, indicating it is the active or selected option. The rest of the interface, including the customer details and financial summary, remains the same.

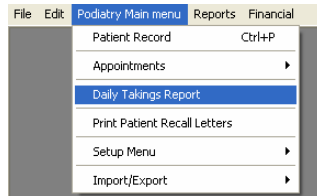
Click on the transaction, and click on the **Receive Payment** button. The details of the transaction will appear on screen. Enter the new amount received, then click on the **Ok** button. The screen above will be updated to show receipt of payment.

Click on the **Patient Record Card** button at centre right to return to the Patient Record screen.

DAILY TAKINGS REPORT

The daily takings report produces a list of all payments received between selected dates.

To obtain this report, select “Daily Takings Report” from the Podiatry Main menu.



This brings up a new screen, as below, where you specify the start and end date for the report and can select the podiatrist.

The dialog box has a title bar and contains the following elements:

- Text: "Select Treatment Dates between" followed by an empty text input field.
- Text: "And" followed by another empty text input field.
- Text: "Podiatrist" followed by a dropdown menu currently set to "All".
- Buttons: "Ok" and "Cancel" at the bottom right.

Enter the dates you wish the report to run over, select the podiatrist, or leave as the default of All, and click on **Ok**. You are then asked where you would like the report to be printed.

Two reports are produced. The first as below lists all transactions, identifying treatment and stock costs over the period entered.

Screen report

Daily Takings between 6 JUN 2004 and 10 JUN 2004 Page 1

Date	Record No.	Surname	Podiatrist Name	Payment Type	Treat £	Stock £	Paid £	Payment Ref
7 JUN 2004	00008	Bloggs			0.00	0.00	0.00	
7 JUN 2004	00008	Bloggs		CA	30.00	0.00	0.00	
7 JUN 2004	00006	Clark		CA	20.00	0.00	20.00	
7 JUN 2004	00005	Clark		CA	20.00	0.00	0.00	
8 JUN 2004	00001	Lyddon		CA	20.00	0.00	20.00	
8 JUN 2004	00003	Bloggs		CA	20.00	0.00	0.00	
	PAT00002			Sales Receipt			25.00	5
	PAT00003			Sales Receipt			20.00	7
					110.00	0.00	85.00	

8 Records printed.

The second report (as below) is subtotalled by payment type (e.g. cash, credit card, etc.)

Screen report

Daily Takings Totals between 6 JUN 2004 and 10 JUN 2004 Page 1

Payment Type	Amount £
CA CASH	60.00
DE DEBIT	25.00
VI VISA	0.00
	<u>85.00</u>

3 Records printed.

CHAPTER 7– CORRESPONDENCE AND E-MAIL

INTRODUCTION

The system has been set up for you to produce letters both in hard copy and by e-mail. Several standard letters have been created and are available for you to use as a starting point for your letters. These are:

- Patient recalls
- Blank letter (contains the address and salutation but no message)
- GP letter
- Orthotic replacement
- Overdue accounts
- Regular refurbishment
- Prescription orthoses.

The above are created from preset templates, which have fields where the particulars of the patient are entered. You can change the templates or create new ones using the Setup Menu, see Page 7-10.

If you wish you can use Microsoft Word to create correspondence with more formatting features, such as bold and underline as well as change of font size. See Page 7-14.

If you have a scanner, you can scan in any correspondence received, or letters created by another method, and link the files of these images to the relevant Patient Record. See Page 7-8.

STANDARD LETTERS

The templates for the standard letters are in a format similar to mail merge for those familiar with this feature. The contents of any letter can be separated into 2 functions:

- Those aspects unique to the sender or recipient, eg names and addresses
- The body of the letter which is the same for any recipient, ie a standard message.

Codes

For each element of the unique information, the template holds a code, these are enclosed in curly brackets { }. A list of these starts on Page 7-19. When you ask the system to create a letter, the system takes the patient's particulars and enters them in the appropriate place in the letter, creating a unique version of the letter for that patient.

Template

The template for the standard letter to a GP looks like this.

The diagram shows a letter template with three callouts:

- Details of your practice:** Points to a list of fields: {PFNAME}, {PFAD01}, {PFAD02}, {PFAD03}, {PFAD04}, {PFPOST}, and Tel. {PFTEL1}.
- GP details:** Points to a list of fields: {DOCNAME}, {DOCAD01}, {DOCAD02}, {DOCAD03}, {DOCAD04}, and {DOCAD05}.
- Patient details:** Points to fields: Ref Patient : {PNAME}, Date of Birth : {PDOB}, Address : {PAD1}, and {PAD2}.

The rest of the template text is as follows:

{#D}
 Dear {DOCDEAR},
 I am writing to inform you that I am providing podiatry to the above patient. If you need any further information relating to his/her treatment please do not hesitate to contact me.
 Yours faithfully
 {DCNAME}

If you create a letter for Mr Fred Bloggs, a unique version of the letter is created with his name and address, as below.

The example letter is as follows:

NOTTINGHAM PODIATRY
 55 HIGH STREET
 NOTTINGHAM

NH1 1XX
 Tel. 0111-111 1111

Smith
 Central Group
 50 Main Street
 Nottingham
 Nh1 2aa

Ref Patient : Mr Fred Bloggs
 Date of Birth : 10 APR 1950
 Address : 19 High Street
 Nottingham

31 AUG 2004

Dear Dr Smith,

I am writing to inform you that I am providing podiatry to the above patient. If you need any further information relating to his/her treatment please do not hesitate to contact me.

Yours faithfully
 IAN MACDONALD

Body of letter

We have supplied 7 sample letters for you to try. In the blank letter, the message or body of the letter is blank, the body of the others is as shown below.

GP letter

I am writing to inform you that I am providing podiatry to the above patient. If you need any further information relating to his/her treatment please do not hesitate to contact me.

Orthotic replacement

It is now over 3 years that you have been wearing your Prescription Foot Orthoses.

To ensure that you continue to maintain maximal benefit from your orthoses they should now be renewed. Renewal will involve re-checking some of your 'Biomechanical' measurements and taking new foot impressions. This will enable us to reformulate an orthotic prescription for you.

Please contact us via telephone, e-mail or at www.chiropodypractice.com to make an appointment to see a Podiatrist. Your new set of orthoses will be ready approximately 2-3 weeks following your consultation.

We look forward to seeing you again.

Overdue accounts

According to our records your account is now 30 days overdue. Your total balance owed is £ {CUTOTBAL}. We would appreciate it if you could pay the balance of your account as soon as possible.

Account breakdown

Less than 30 days	£ {CUCURRENT}
30 - 60 Days	£ {CUCURRENT1}
60 - 90 Days	£ {CUCURRENT2}
Over 90 Days	£ {CUCURRENT3}

The {CU...} are codes for calculations of various account balances. The actual amounts will appear in the final letter.

