PHYSIOTHERAPY PRACTICE MANAGEMENT SYSTEM

(PRIVATE PRACTITIONERS)

USER MANUAL

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Contents of Advanced Manual

CHAPTER 1 – INTRODUCTION

THE PHYSIOTHERAPY PRACTICE MANAGEMENT SYSTEM

The Physiotherapy Practice Management system (PPMS) has been designed to suit a range of physiotherapists, starting with those who simply wish to record basic patient information such as name and address. However, for physiotherapists 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 physiotherapists, 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 physiotherapists 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 Physiotherapy 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 Physiotherapy 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 Physiotherapy system. Also used to reset accounts	User Manual Chapter 2 and Chapter 8
About Physiotherapy Practice Management	Gives the version number of the Physiotherapy software and states copyright	None
Exit	Closes the Physiotherapy software	None

Edit menu

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

Physiotherapy 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 physiotherapists 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

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 Physiotherapy 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 Physiotherapy system) are visible, and when the physiotherapy 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, Physiotherapy 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 Physiotherapy 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 Physiotherapy system:

- Getting your computer ready for the Physiotherapy software
- Installing the permanent Physiotherapy 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 Physiotherapy 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 physiotherapy screen smaller.

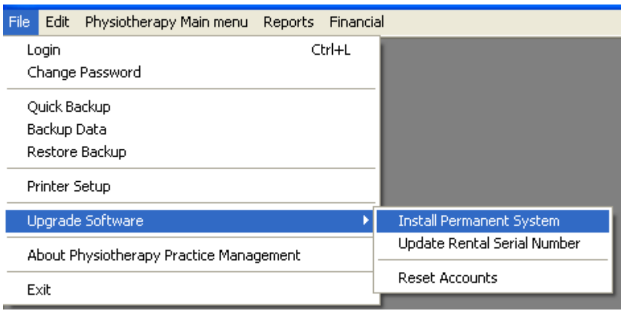
While you are checking the settings, ensure that the number of colours displayed is greater than 256 (16 bit or greater is also sufficient). If you alter the colours, re-check the display resolution.

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.

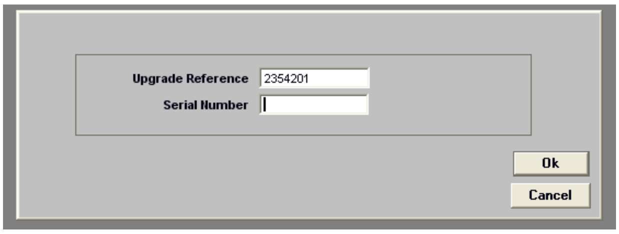
INSTALLING THE SOFTWARE

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

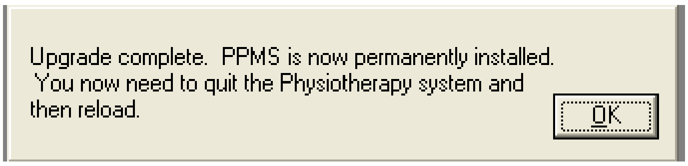
As soon as you have paid for the licence, you will receive an Activation Code. On receiving the code, you need to install the permanent Physiotherapy system. To do this, select “Upgrade Software” then “Install Permanent System” from the File menu as shown here. (ie left click on the File menu, move the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



This opens up the screen shown below.



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

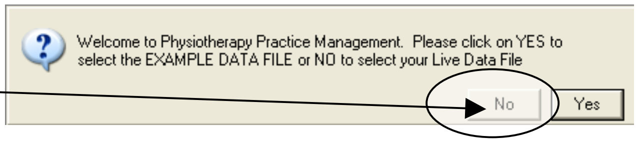


Left click on the ***OK*** button. Then select “Exit” from the File menu to close the system.

QUICK SET-UP FOR YOUR OWN DATABASE

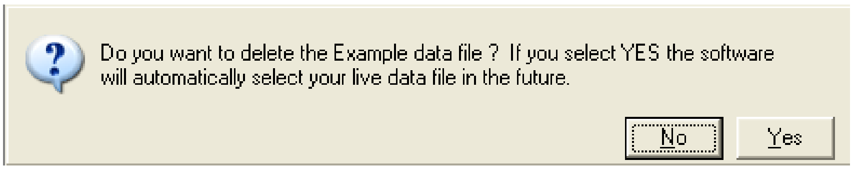
Select the live data option

Now you need to open the permanent Physiotherapy 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.

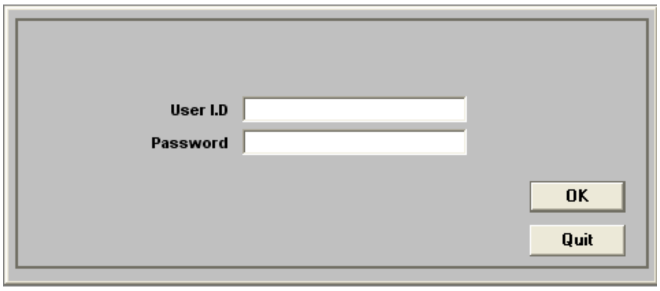


Left click

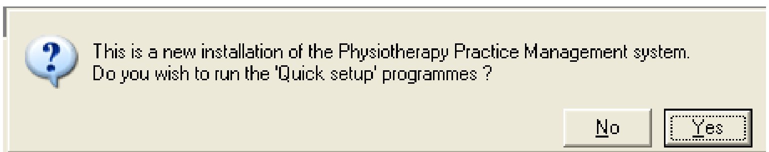
Left click on the ***No*** button to select live data. A further screen then appears as below, asking if you wish to delete the Example data file.



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 PHYSIO for the User ID without any password. Another screen appears as below.

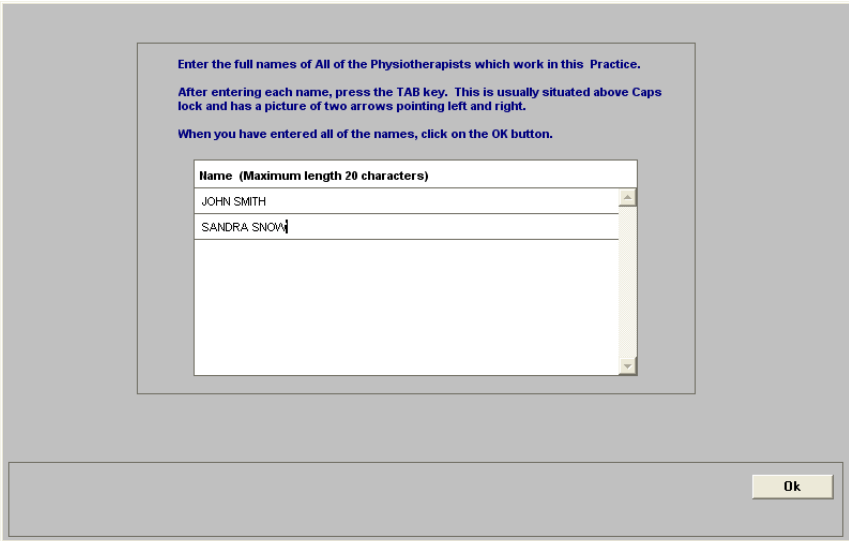


Quick set-up routines

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.

Physiotherapists

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



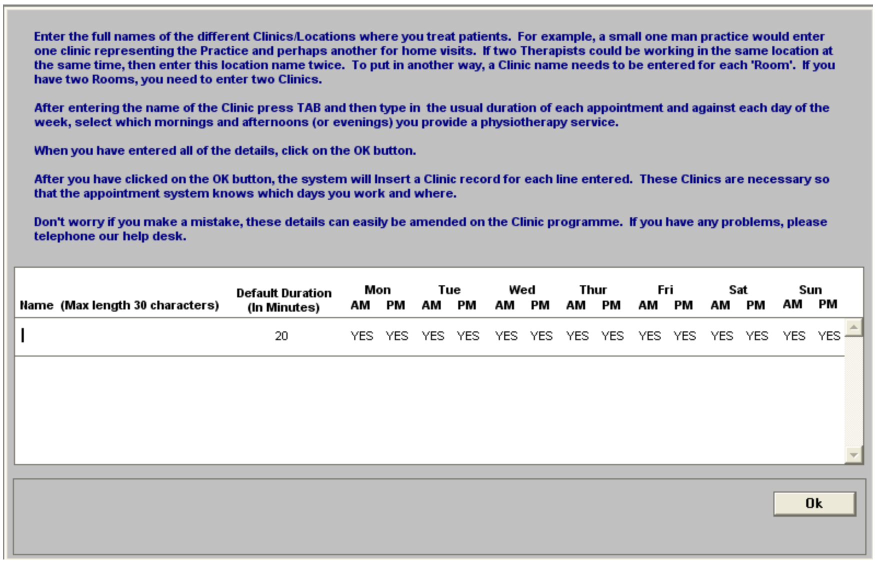
Type in the names of each physiotherapist who work within your Practice. After entering each name, press the TAB key to move down to the next line.

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.



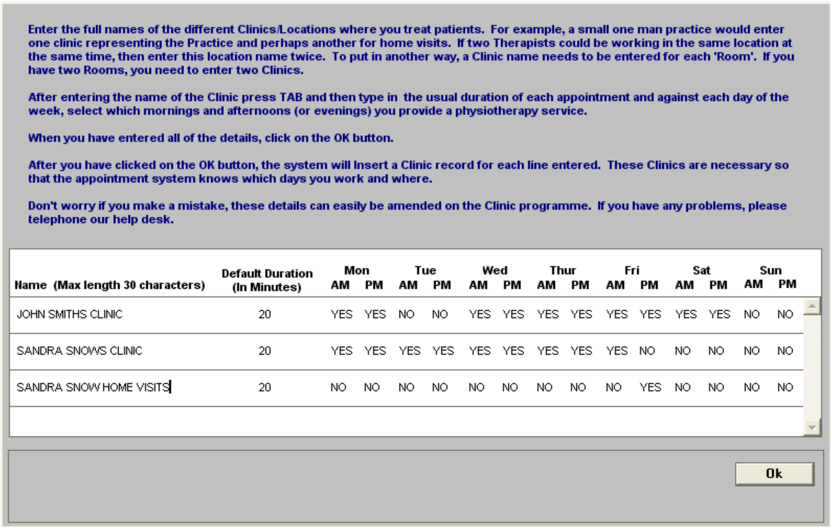
A clinic is a unique physiotherapist or location against which an appointment can be made for a patient. Each ‘clinic’ has its own Appointments Diary.

So, if you have two physiotherapists (rooms) 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 physiotherapist. Generally, unless you have several physiotherapists sharing a room on different days of the week it is easier to set up one clinic for each physiotherapist, using the physiotherapist 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.



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

You don’t have to describe the clinics as ‘Rooms’ 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.

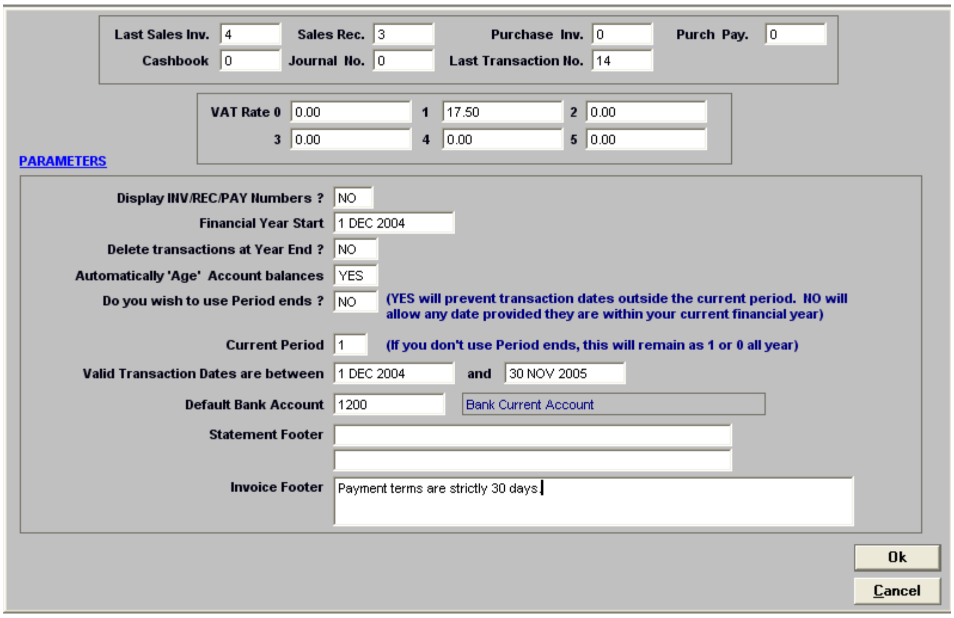
Appointments diary

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 especially if you intend to use the financial module of the system. Left click on ***Ok*** to obtain the screen below.



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

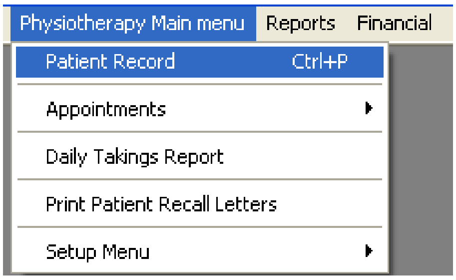
The Patient Record screen is the main entry point to the Physiotherapy system, and is the screen you will use most often. It is where you enter a patient's personal details and past history, and the name of their physiotherapist. Most information about patients is either on the Patient Record screen 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 PPMS icon on the desktop.

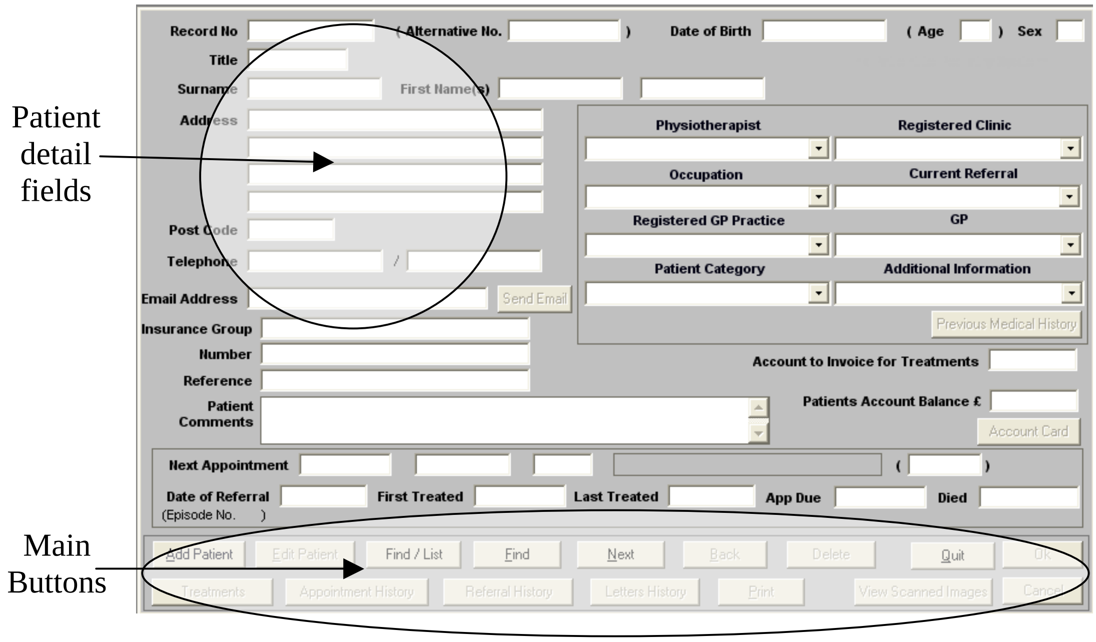
Then left click on the Physiotherapy Main menu to bring down the menu, and left click on "Patient Record".



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.



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 Physiotherapy 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 Physiotherapy 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 *Physiotherapist.*

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.)

<u>Amend record</u>

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 two 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.

<u>DETAILS OF FIELDS OF PATIENT RECORD SCREEN</u>

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

<u>Obligatory fields</u>

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 the default date and then amended later.

<u>Record Number</u>

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.

<u>Date of Birth</u>

This field must be filled in before the patient record can be saved. 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 an existing card index number this can be entered in the *Alternative No* field.

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

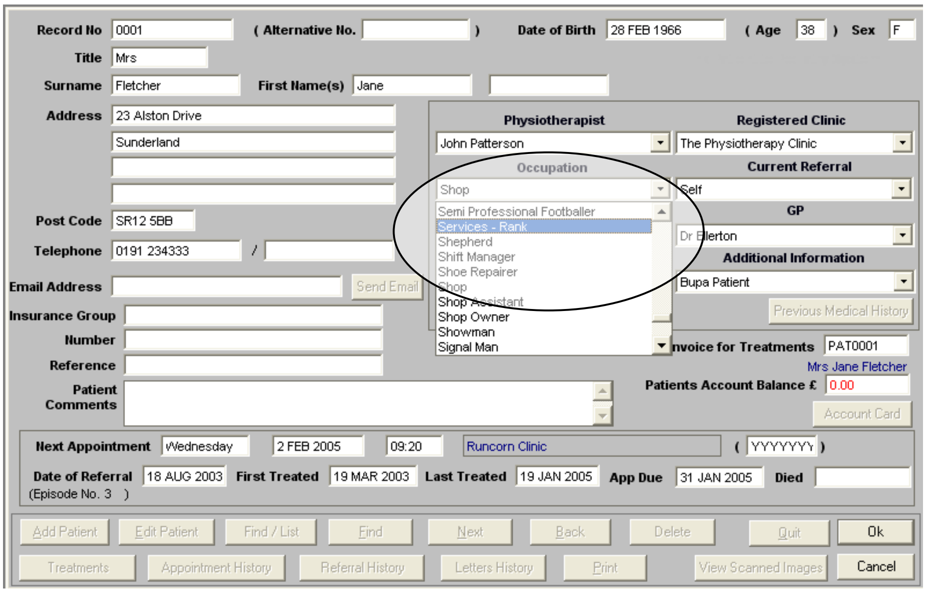
Enter the patient’s full address and post code (if you know it) in the fields for the address.

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 selection fields are:

- *Physiotherapist*.
- *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.
- *Additional Information*. As patient category above.

You can amend the list of available options for some of the above by selecting “Setup Menu” from the Physiotherapy 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 physiotherapist, click on ***Add New Record*** and the following screen for adding a record for a new physiotherapist appears.

Any reference code in the top field of this new screen is entered automatically by the system except for the Physiotherapists. We recommend you use the therapists initials. 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.

<u>Patient appointment fields</u>

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.

<u>DETAILS OF BUTTONS OF PATIENT RECORD SCREEN</u>

<u>Control buttons at foot of screen</u>

<u>Add Patient</u>

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***.

<u>Edit</u>

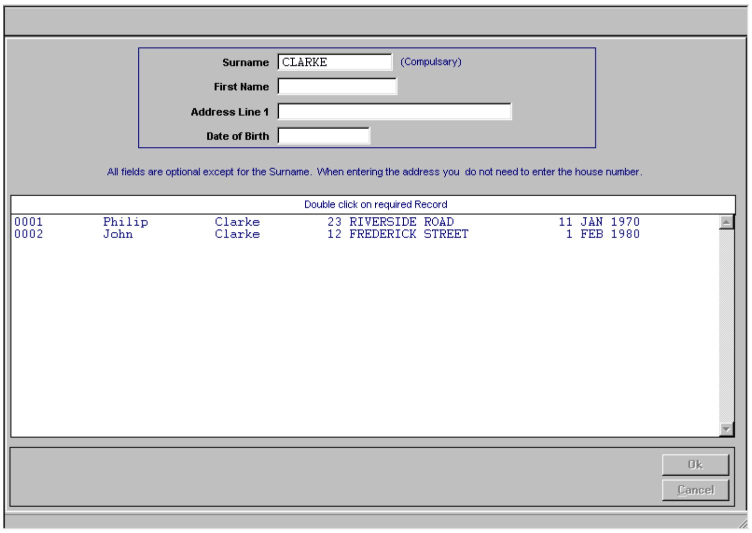
The ***Edit*** button allows you to change details within a record after it has been saved. However, an actual record must already be displayed on the screen. If there is not, the ***Edit*** button will be in grey and will not respond when clicked on. Use the ***Find*** or ***Find/List*** button to select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



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 onto the computers hard disk. 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 Physiotherapy system. In addition, old letters and correspondence received can be scanned into your computer and listed on the Patient Record screen. The system allows you to record up 999 images against each patient record.

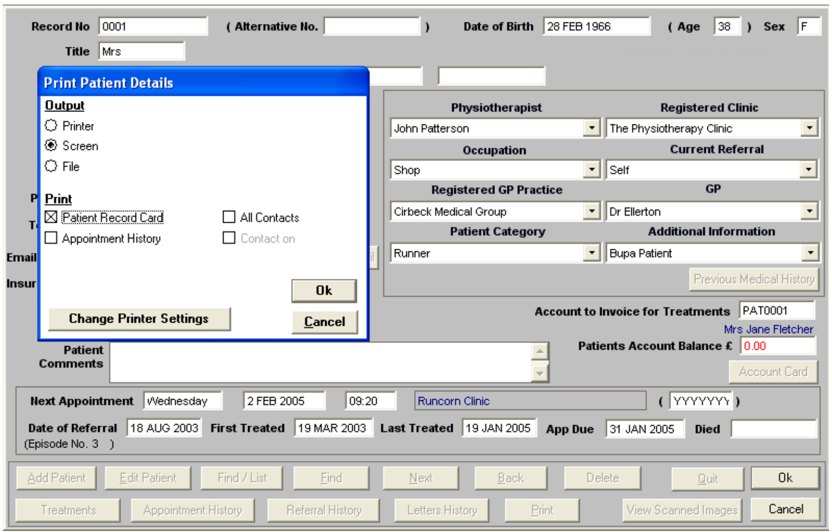
Clicking on the ***View Scanned Images*** button brings up a new screen. To return to the Patient Record screen, click on the ***Return to Patient Record Card*** button at the foot of the screen. For more information, see Page 7-8.

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 Physiotherapy 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).

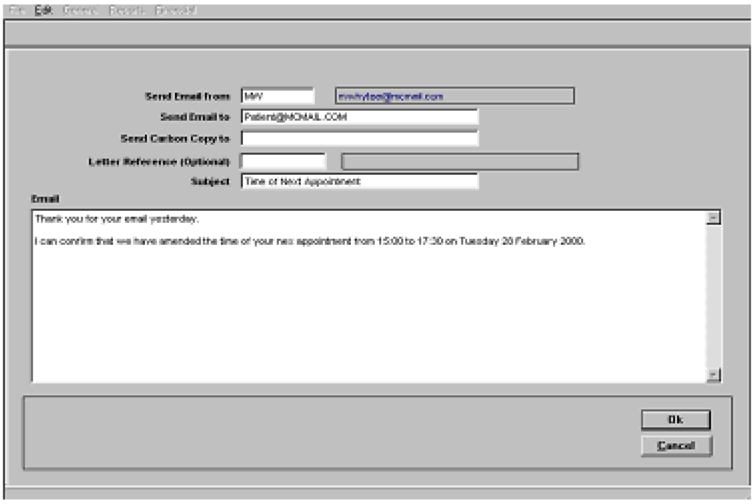
Then on the pop-up menu, click on “Print Page”.

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.

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.

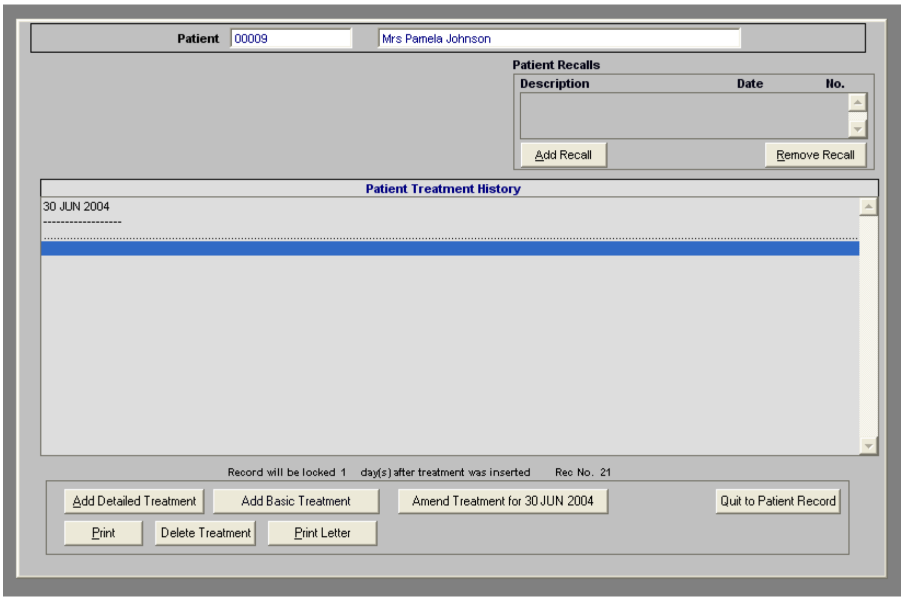
ORGANISATION OF TREATMENT SCREENS

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 Physiotherapy 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.



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.

Treatment confidentiality

It is good practice to restrict access to treatment data for users who are not clinicians. For this reason the software only displays the treatment notes if it is a clinician who has logged into the PPMS system. If a receptionist is logged in, he/she will only see the dates of the treatments and the fees charged.

Add treatment information

To enter details of a treatment, click on either the ***Add Detailed Treatment*** button (see Page 4-9), 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 to check up on their progress. 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 Physiotherapy 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 consultation and click on the ***Amend Treatment for ‘date’*** button to view the details of that consultation. 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

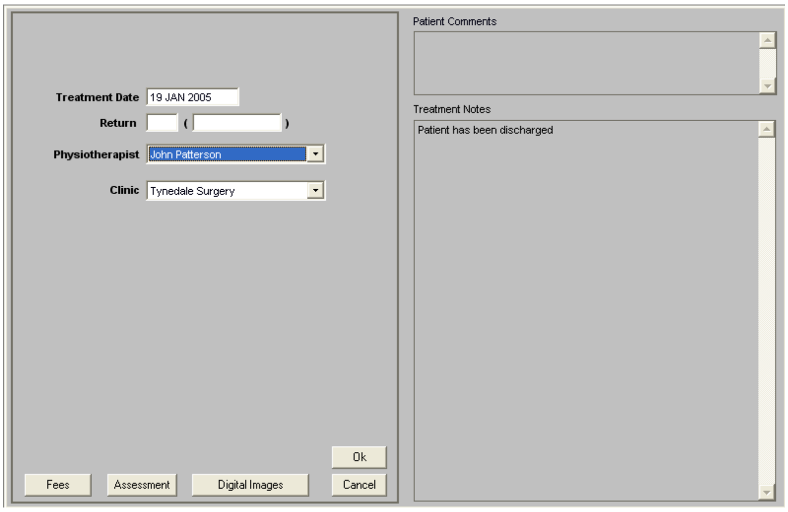
This enables you to print a letter to (or about) this patient. For more information see Chapter 7.

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 physiotherapist and clinic for this patient, the system enters these automatically in the fields *Physiotherapist* 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.

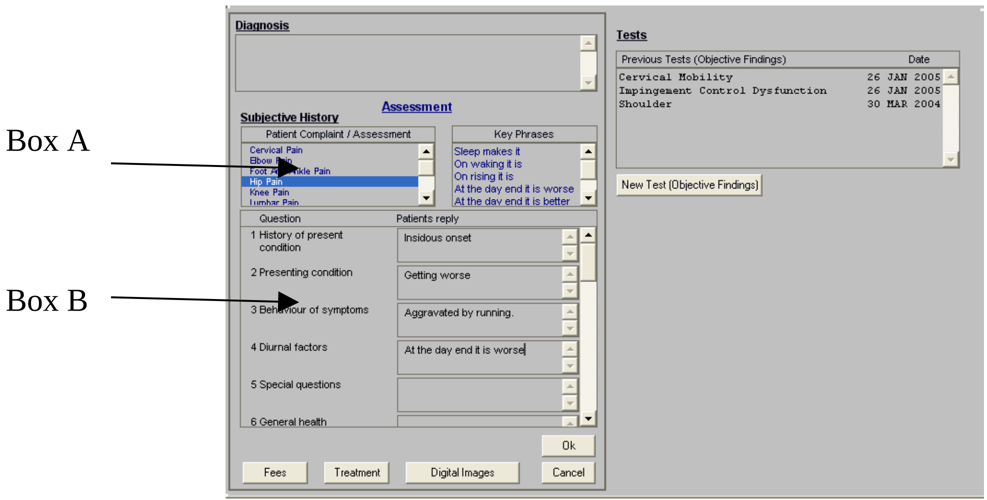
Buttons of basic treatment screen

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.

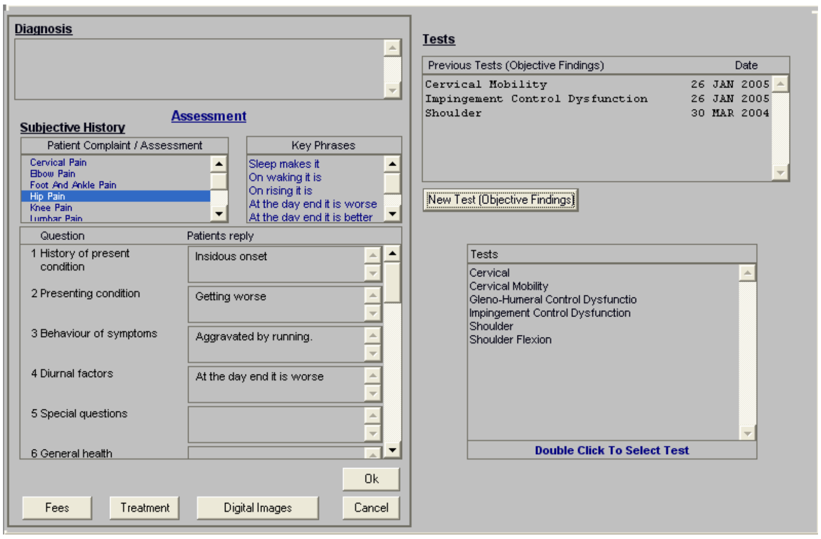
Assessment

The ***Assessment*** button brings up a new section filling both the left and right-hand side of the screen. The left part of the screen can be used to take down the Subjective history from the patient.

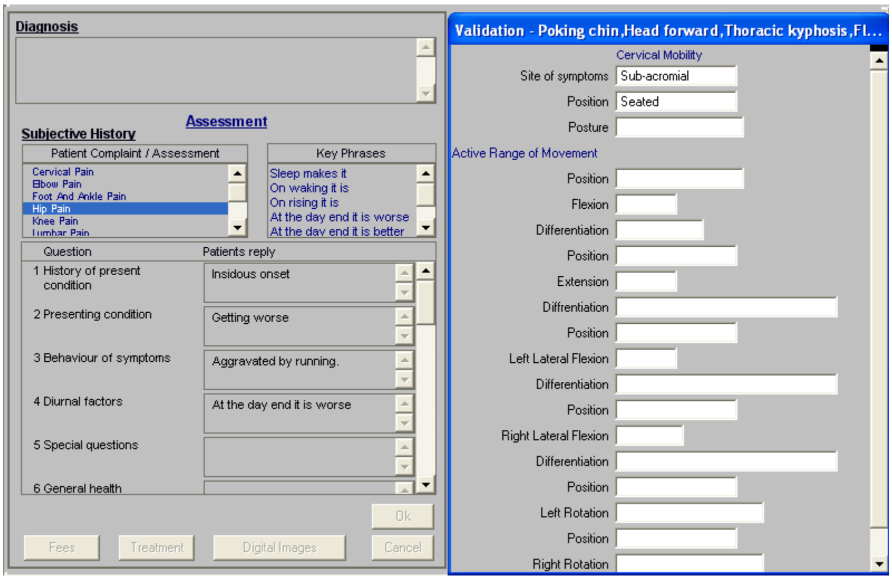


Begin by select the Assessment in Box A. Box B will then display your standard questions for this assessment. Click the cursor into the box right of the question and type in the answer. If key phrases have been created, click on the phrase which will then automatically be typed in.

The right half of the screen displays any Clinical Tests which have been performed on the patient. To view or amend a test, double click on the line in the list. To do a new test, begin by clicking on the ***New Test (Objective Findings)*** button.



A list of Tests are displayed in the bottom half of the screen. Double click on the required Test and a new screen is displayed as shown below.



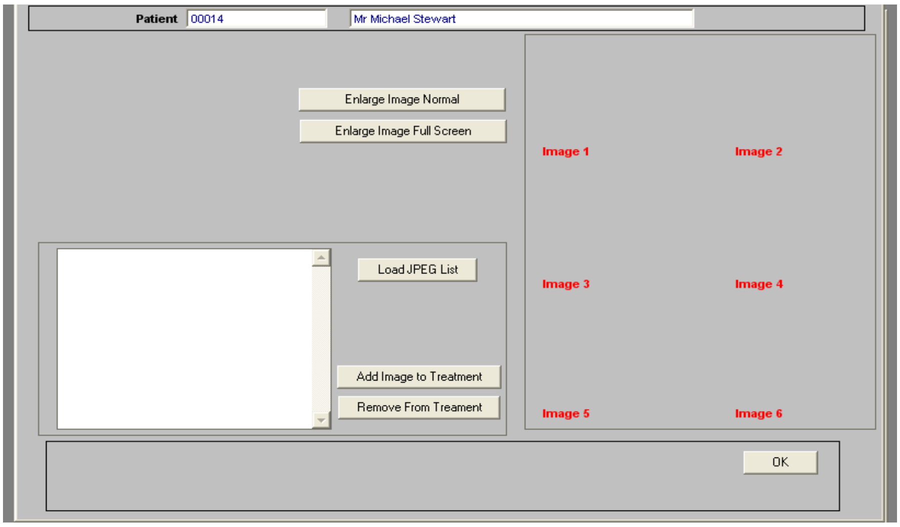
In this example we have selected the Cervical Mobility Test. Tab down filling in the relevant parts. The validation for each item is displayed at the top of the screen. When the test is complete, click on the OK button and the test results will be added to the patients history.

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

Digital images

The Physiotherapy 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.

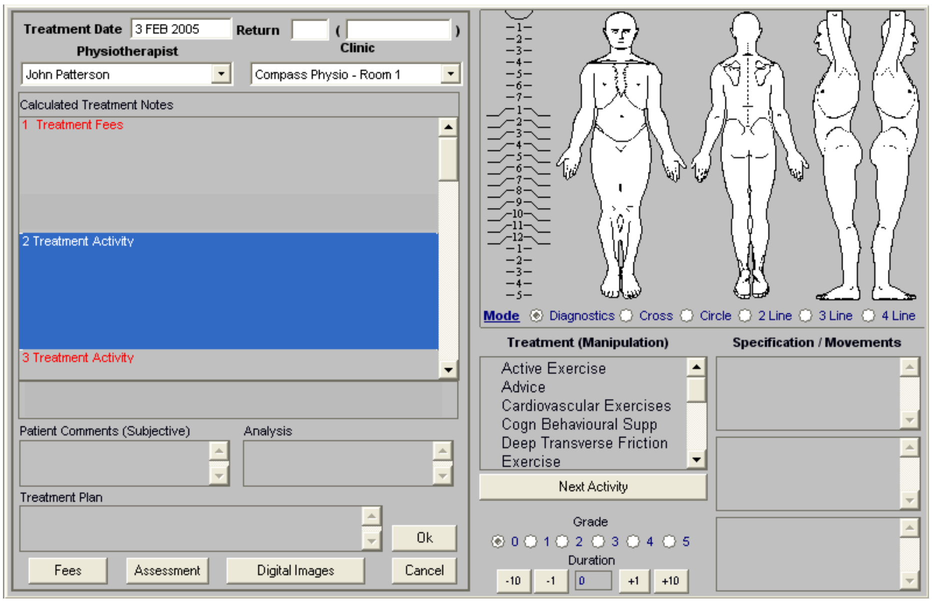
Remember that the information will normally be locked after 1 calendar day. To edit your entries within the timescale, use the ***Amend Treatment for ‘date’*** button. If you wish, you can also enter details about the same treatment using the detailed treatment screen.

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 Treatments and Movement/Specifications 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 physiotherapist and clinic for this patient, the system enters these automatically in the fields *Physiotherapist* 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 consultation you can enter up to nine separate activities, with each one relating to a maximum of seven locations on the body charts. In addition, for each

Treatment up to 3 Movements/Specifications can be selected to add more detail to the treatment notes.

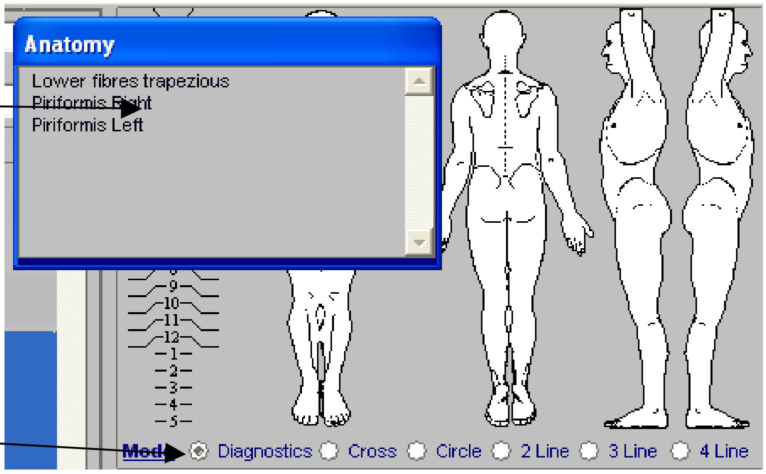
You can amend the contents of the lists to suit your own purposes. Also as you select these items, the system automatically creates treatment notes, which can be amended similarly. See Chapter 9 of the Advanced Manual for information on how to alter the treatment lists and calculated notes.

BODY CHARTS

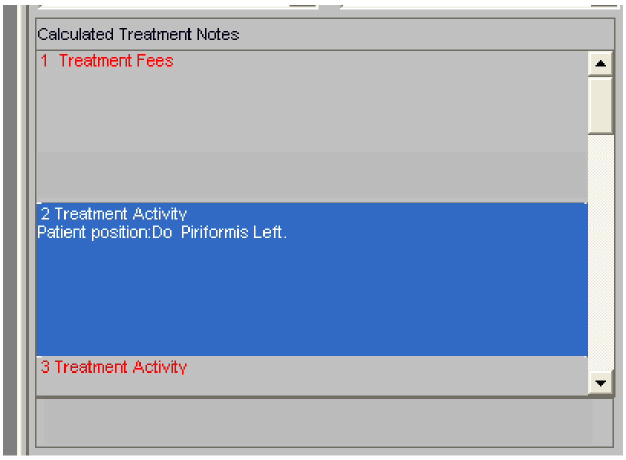
When in Diagnostics mode the spinal column and body charts enable you to pinpoint the exact area of treatment. When you click on a location the anatomy for that part of the body is displayed in a scroll box allowing you to select up to seven locations which are being treated.

Anatomy for back.

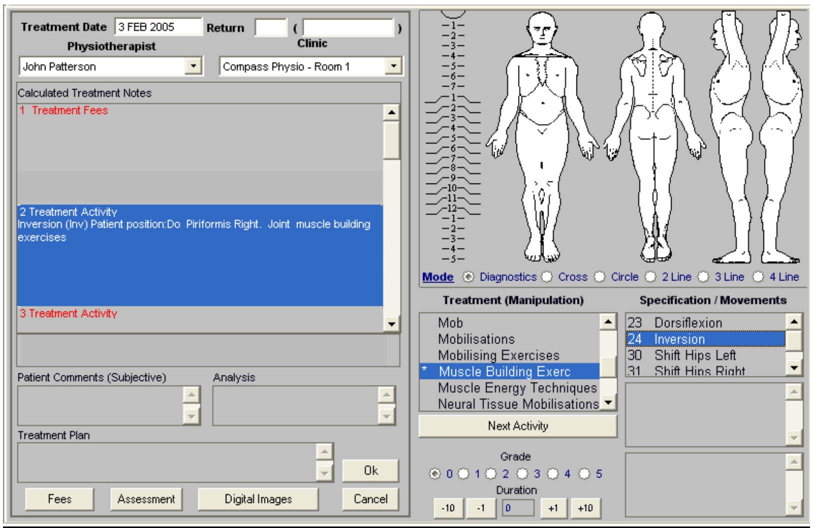
Diagnostics mode.



Click on the line(s) in the Anatomy box which identify the location being treated. A description of the anatomy is then automatically added into the treatment notes.



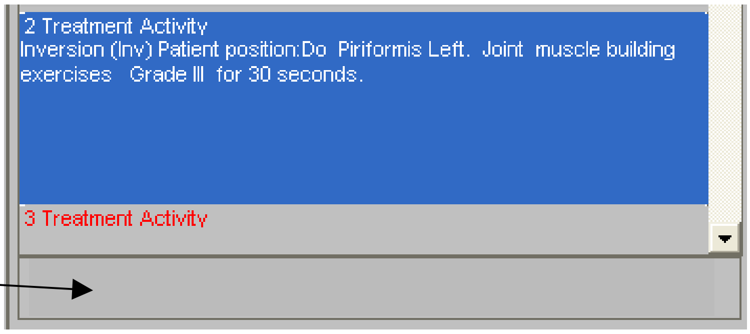
Continue by selecting a Treatment.



In this example we have selected Muscle Building Exercises – Invertion. You can continue by selecting a Grade and a duration. Grades are between 0 and 5 and Durations are in either seconds or minutes depending on the type of treatment.

The treatment notes now look like this.

Additional notes

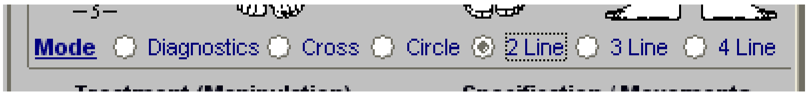


You can add any additional comments if required. If more activities are going to be performed in today’s treatment click on the ***Next Activity*** button to continue.

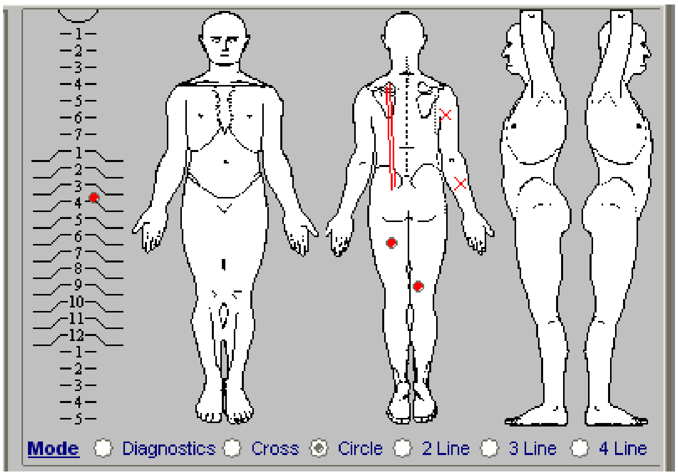
<u>Calculated Notes</u>

If you look carefully at the calculated notes you will notice that the order in which they have been created is different from the example in the introductory manual. People write up their notes in a different ways. For this reason the system allows you to customise the way your notes written. For more details on how to do this see the User Parameters section in the Advance manual

Drawing Circles, Lines and Crosses



Begin by selecting the type of image to draw. Then, for circles and crosses click once on the area on the body chart with the **Left** mouse button. For lines, you need to click and drag before leaving go of the button. This will draw a line between the two points. To remove an object, click on it with the **Right** mouse button without dragging.



These images are remembered as each new treatment is added. This saves you having to redraw the images each time the patient comes back for a consultation. It also means that your treatment records have an audit of your diagrams. The diagram six months ago may be different from today. Editing or viewing previous treatments show the diagrams as they were on that date.

Entering additional details

In the *Patient Comments* 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 *Analysis* and *Treatment plan.*

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.

<u>Buttons of detailed treatment screen</u>

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

<u>Detailed treatment information</u>

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 Physiotherapy 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 physiotherapist, 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 physiotherapists and clinics. You may also have created the first four weeks of diary sheets.

New appointment sheets

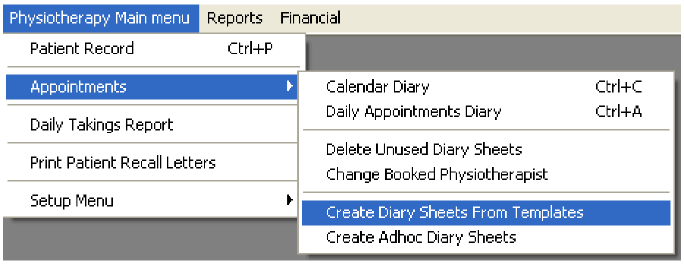
To book appointments beyond the first four weeks of diary sheets, you will have to create more diary sheets. There are two methods of doing this:

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

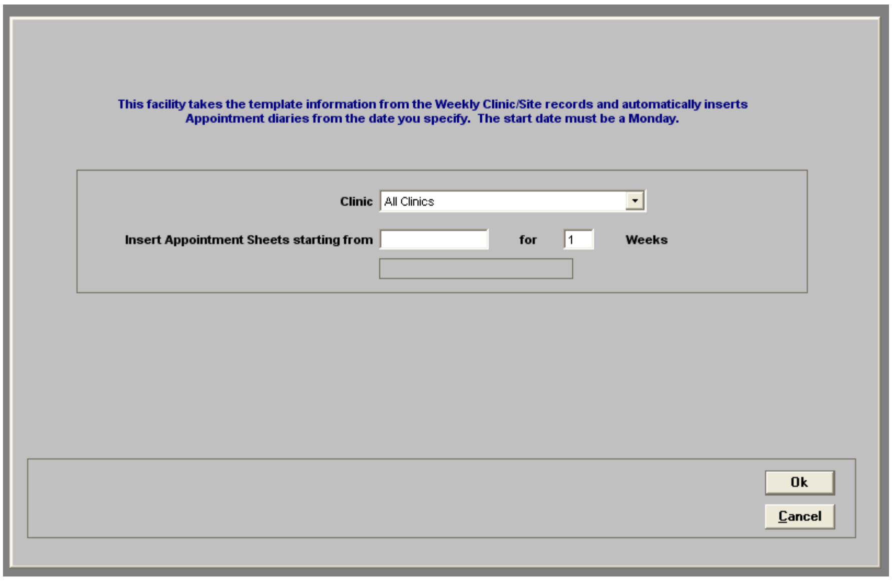
Create weekly diary sheets

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 Physiotherapy Main menu as shown here. (To do this, click on the Physiotherapy 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.

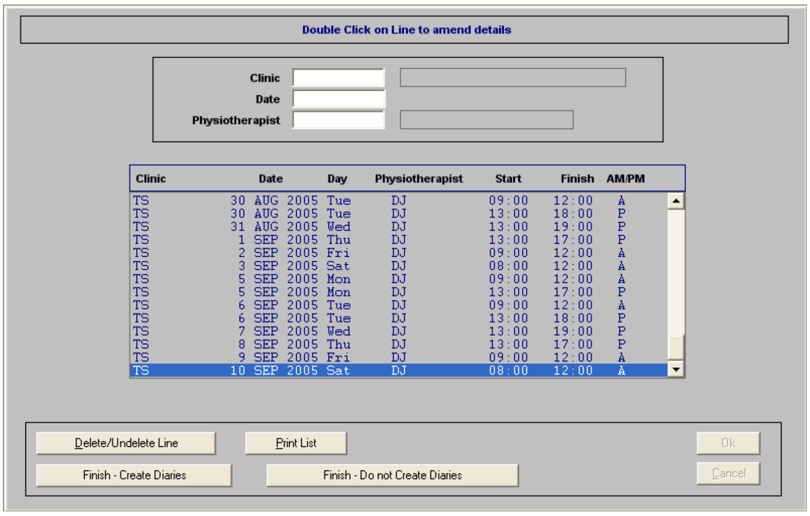


First, enter the date of the Monday from which the sheets are to start and press the TAB key. The box below shows the system's calculation of the start date you have entered. If this is not a Monday, change it.

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 physiotherapist 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.



The system has taken the information from the template for the clinic record called 'Meadow Physiotherapy Practice'. David Jones is the only physiotherapist who uses that room. However, the template could have been setup with different Physiotherapists working there on different days of the week.

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 physiotherapist is going to cover one of these sessions you can change the diary sheet. To do, this double click on the line in question, enter the different physiotherapist code in the *Physiotherapist* 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 *Physiotherapist* field which brings up a list of physiotherapists, and double click on the required name.

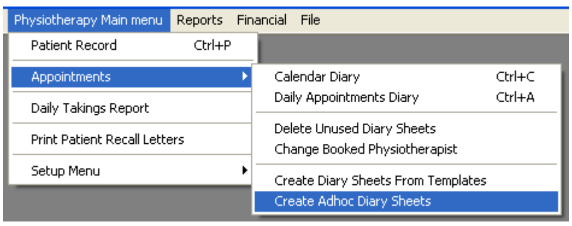
When the list of diary sheets is to your liking, you can use the ***Print List*** button to obtain a copy of your list. Printing the list to screen lets you see the whole list as a final check before you decide whether to insert the diary sheets or not.

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.

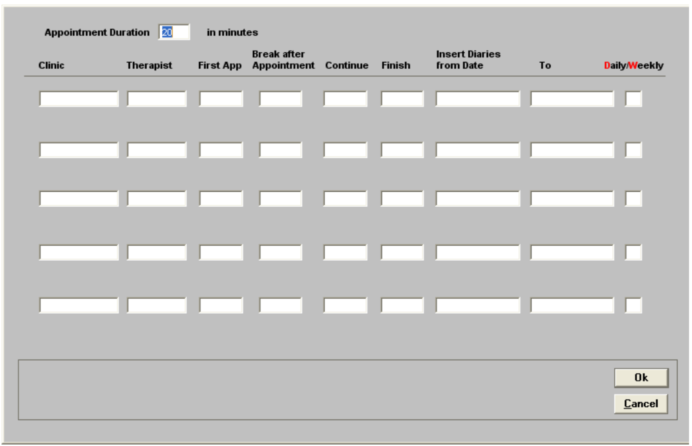
Create ad hoc diary sheets

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 Physiotherapy Main menu as shown here.



This opens up the new screen below.



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

Next enter the clinic and physiotherapist 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).

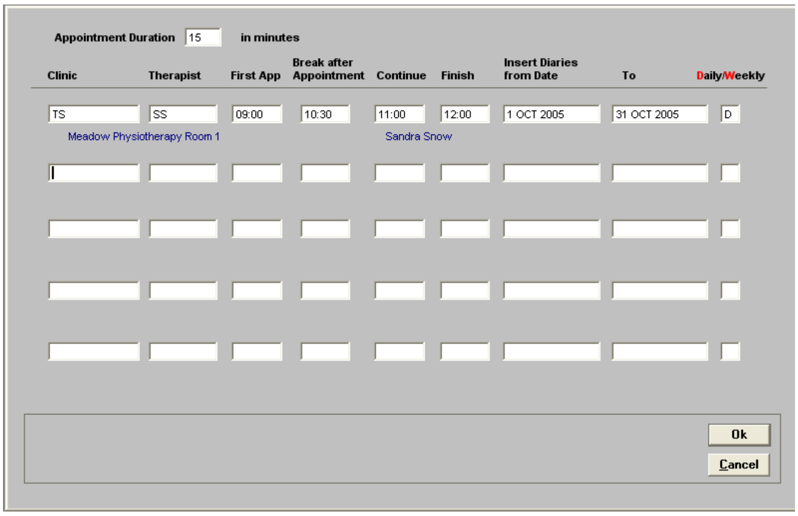
Then enter the times of the first appointment, any scheduled break, the restart after the break, and last appointment.

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.

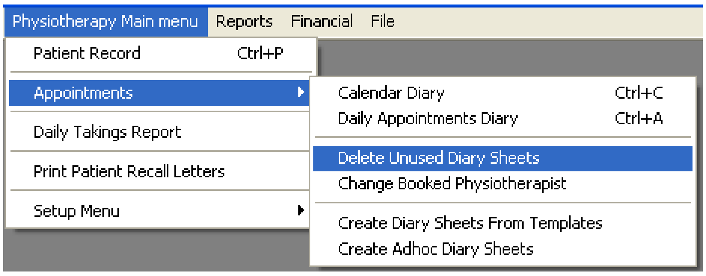
Create as many diary sheets as you need, using a different row for each. A separate line is needed for each morning and each afternoon session.

The example below shows one set of clinic sheets being created. Meadow Physiotherapy Practice 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.

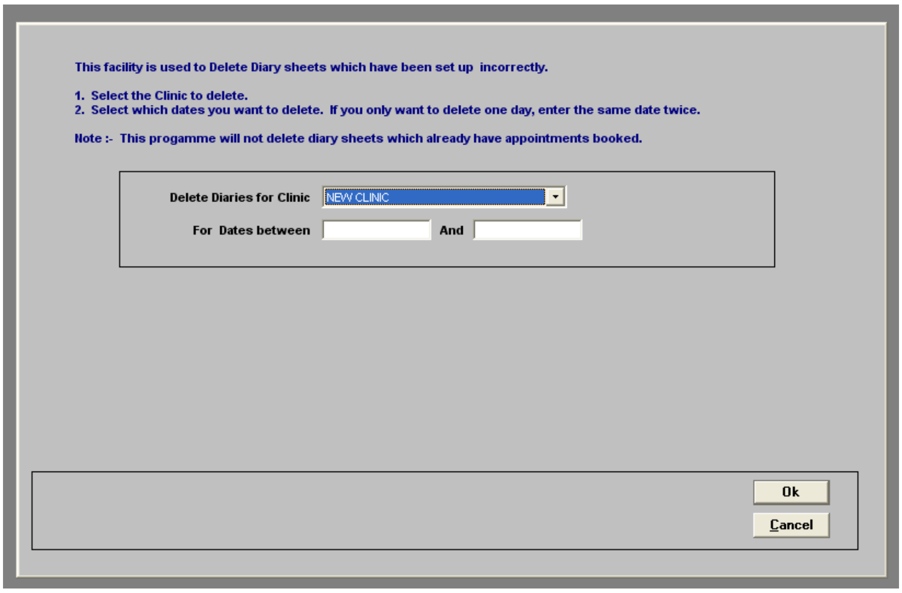


Delete diary sheets

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



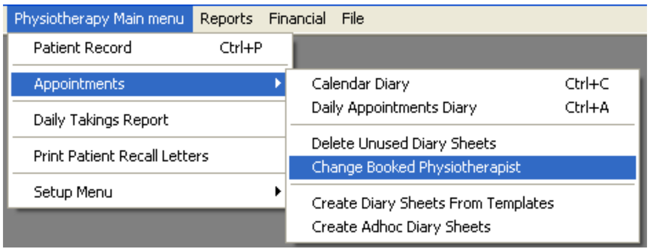
This opens a new screen where you can select the clinic and the dates whose sheets you wish to delete.



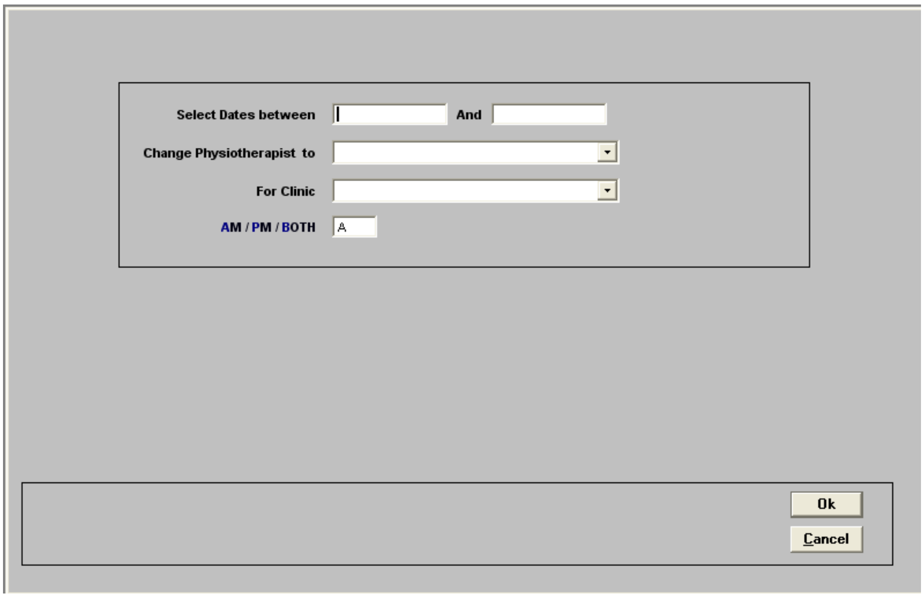
Click on the down arrow beside the field *Delete Diaries for Clinic* to select the clinic. Then enter the date range for the diary sheets to be deleted. The system will search through your selected diary sheets and delete them provided there are no appointments already booked.

Change booked physiotherapist

There will be times when a physiotherapist is allocated to a clinic that he/she cannot do so the clinic will be covered by another physiotherapist. You can show this on the system by selecting "Appointments" then "Change Booked Physiotherapist" on the Physiotherapy Main menu.



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



New clinics or physiotherapists

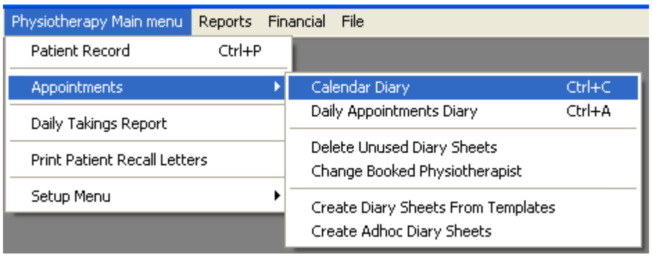
Chapter 8 details how to add physiotherapists and clinics to your existing lists. It also explains how to assign holiday periods.

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.

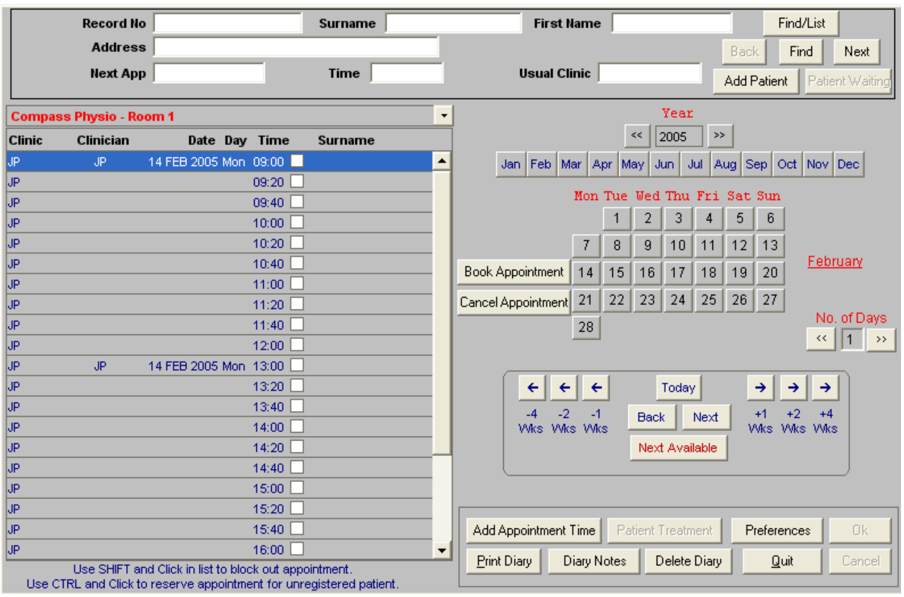
To open the calendar diary, on the Physiotherapy Main menu, select "Appointments" then "Calendar Diary". (You have to click on Physiotherapy Main menu, move the cursor down until "Appointments" is highlighted which brings up the sub-menu, and then move the cursor to the right until "Calendar Diary" is 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, use the ***Find*** or the **Find/List** button in the top section of the screen.

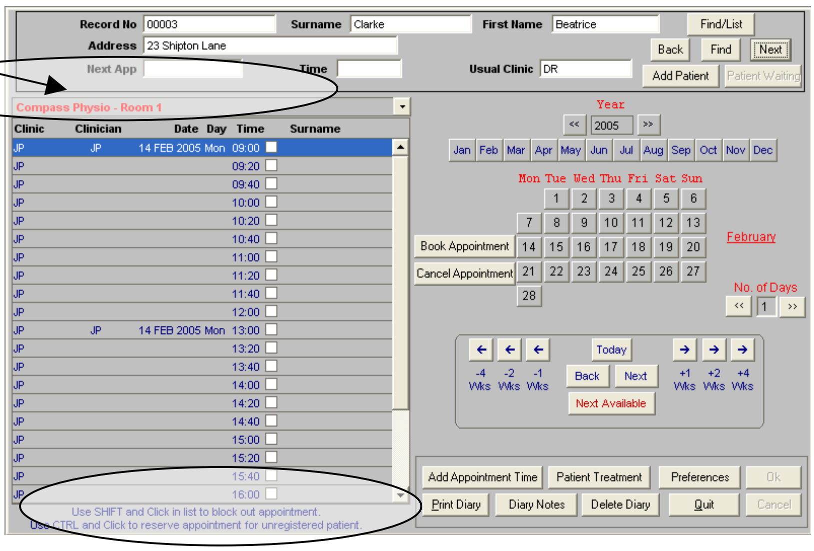
Add patient

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 card. 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.

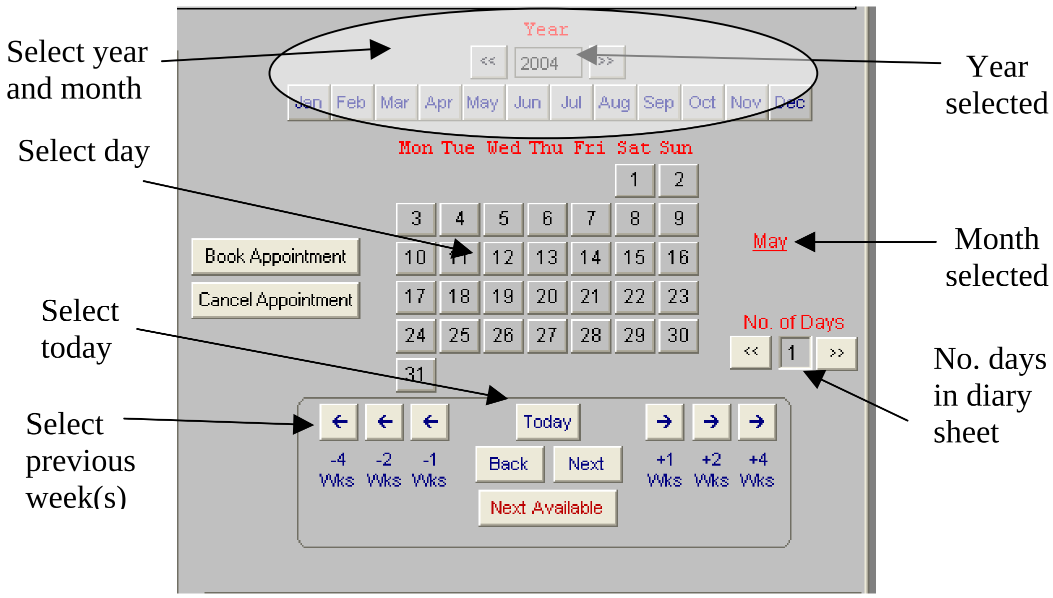
Select clinic



Useful information

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.



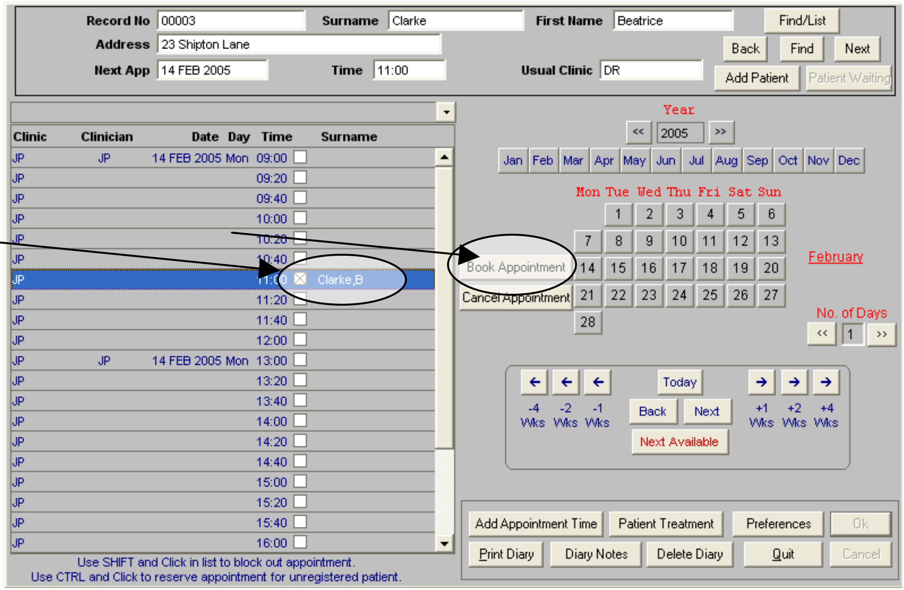
Use the various buttons in this section of the screen to select the date of the appointment. The easiest method is probably to click on the month and then the day (and ensure that the year is correct). This calls up the diary sheet for the day of the appointment.

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.

Book appointment



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.

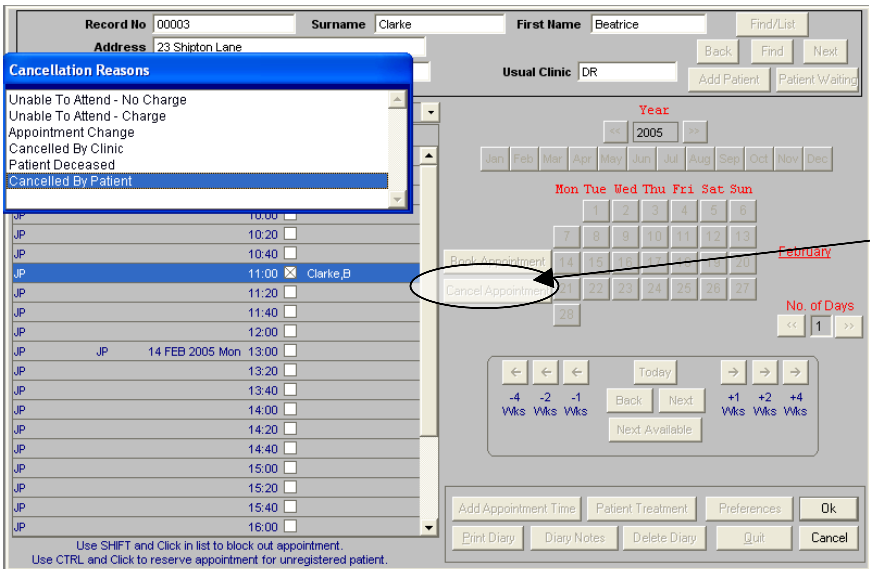
Then click on the ***Book Appointment*** button and select the time. A pop-up screen tells you that have already booked an appointment for that patient, and gives you the option to cancel the previous appointment. (This feature can be switched off, by selecting “User Parameters” from the “Advanced Setup”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



Cancel appointment

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 Physiotherapy Main menu to select the new screen, use the Physiotherapy 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 physiotherapist.

A receptionist with the Physiotherapy system can bring the patient details on screen, and click on ***Patient Waiting***. If the physiotherapist 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 Physiotherapists 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.

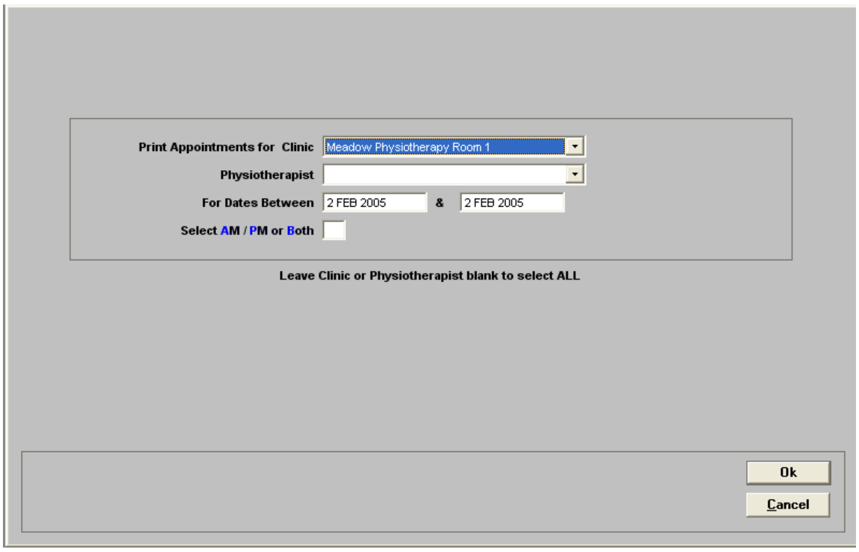
Preferences

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.



This screen lets you select which diary sheets to print and the date range. You can also select the physiotherapist 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 physiotherapist for one week, or for an individual clinic. If you leave the physiotherapist 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

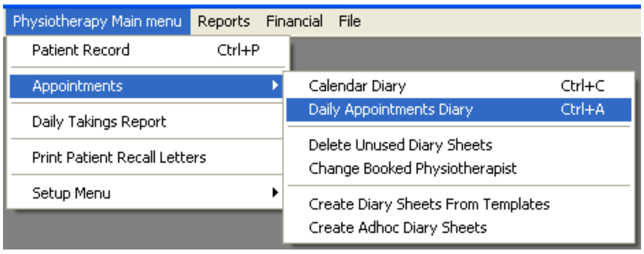
These buttons operate as normal. Clicking on ***Quit*** closes the calendar diary and reverts to the physiotherapy menus.

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.

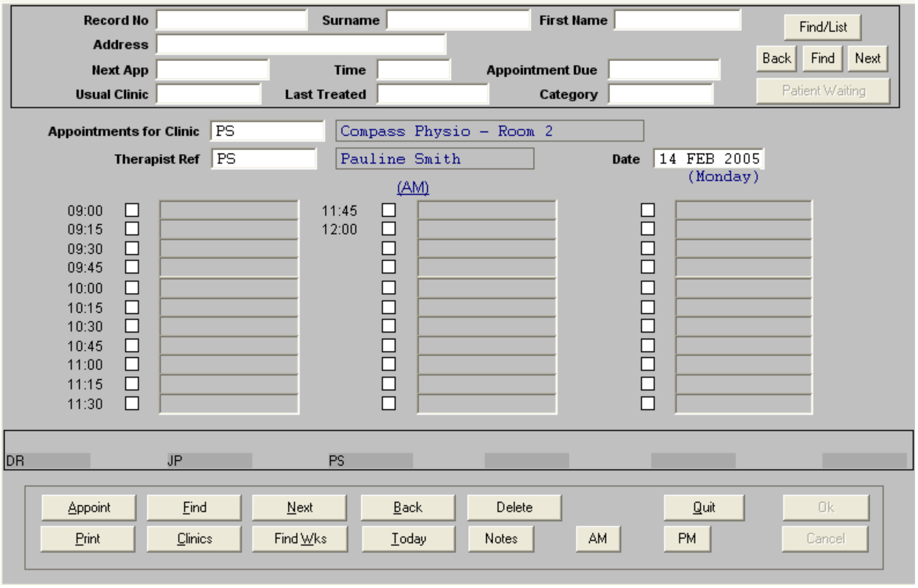
To open the daily appointments diary, on the Physiotherapy Main menu, select "Appointments" then "Daily Appointments Diary". (You have to click on Physiotherapy Main menu, move the cursor down until "Appointments" is highlighted which brings up the sub-menu, and then move the cursor to the right and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

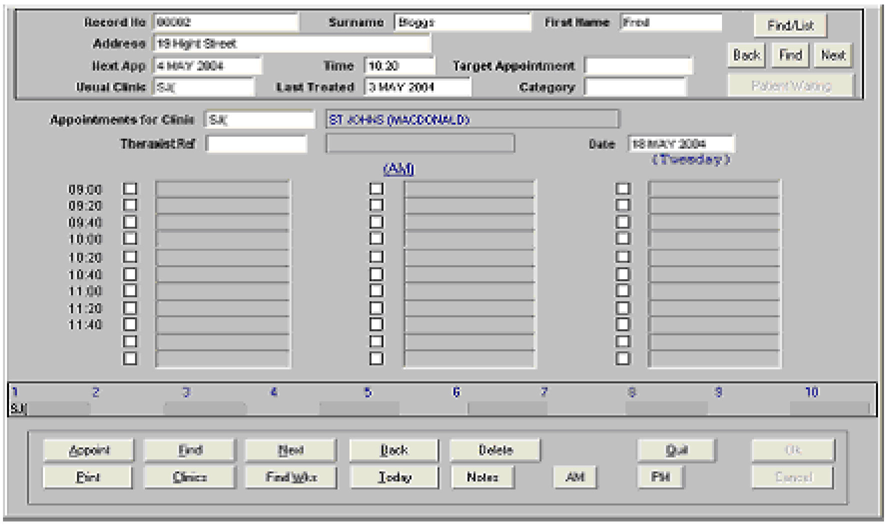
The next stage is to select the clinic and then the date. The clinic already displayed above the diary sheet may be the one you want, in which case no action is needed. To change or enter the clinic, click on the ***Clinic*** button at the foot of the screen, this opens a pop-up menu. Highlight which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

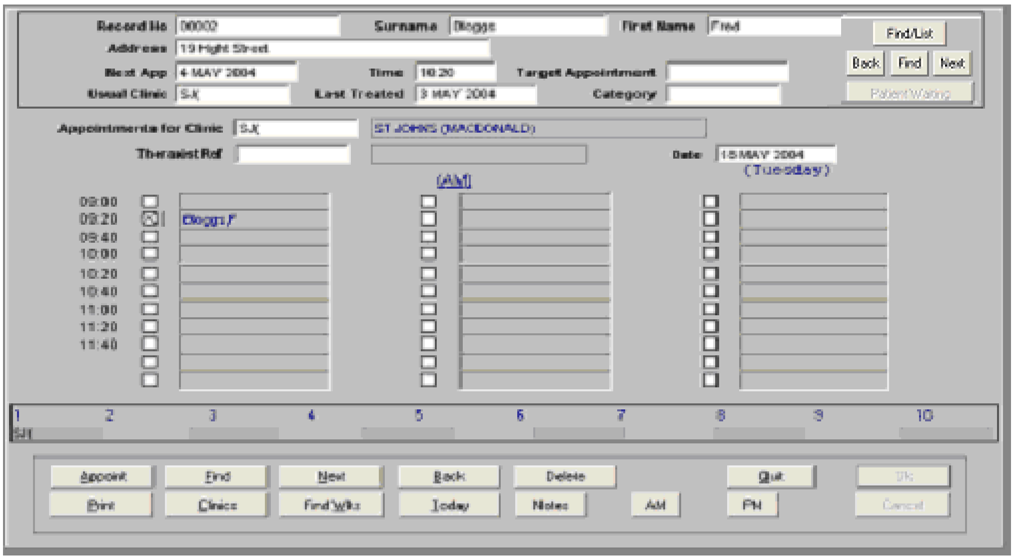
The screen now shows the diary sheet for the morning or afternoon of the specified clinic and date as below.



The 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.



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 an extremely quick way of recording treatments. 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 treatment will be inserted automatically including details of the date, clinic, and the physiotherapist.

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 with out 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.

<u>Details of buttons on daily appointment diary screen</u>

<u>Appoint</u>

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.

<u>Find</u>

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

<u>Next and back</u>

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.

<u>Delete</u>

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 Physiotherapy Main menu.

<u>Print</u>

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).

<u>Clinics</u>

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 Physiotherapy 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.

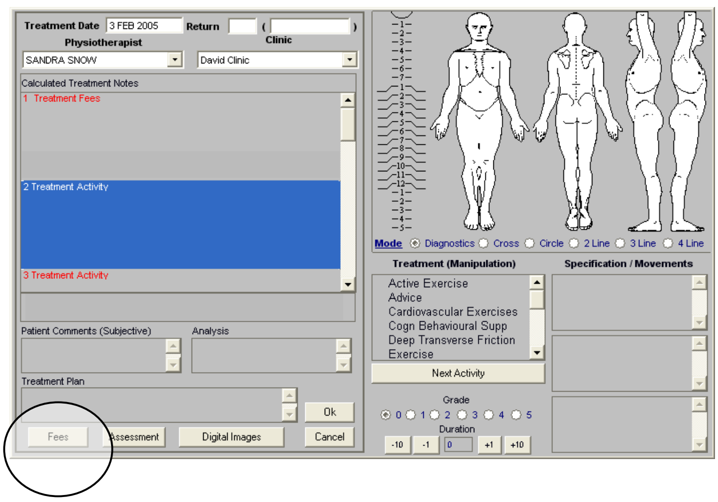
AUTOMATIC INVOICING

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). Chapter 4 details how to do this.

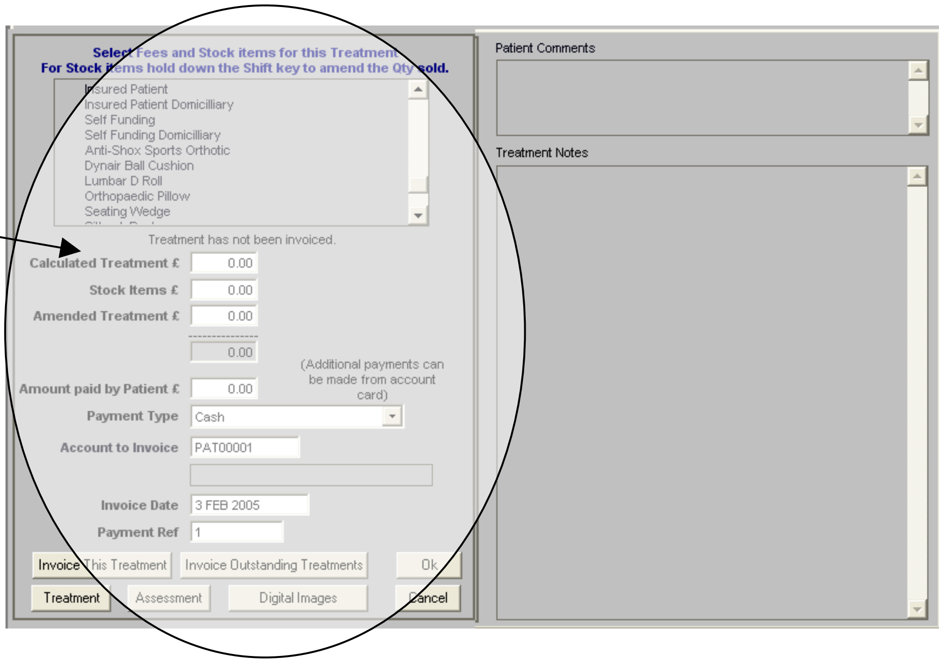
Or if you have already entered the treatment details, find the Patient Record screen for the patient, and click on the ***Treatments*** button. Then select the treatment from the list in the *Patient Treatment History* box on the treatment history screen. Now click on the ***Amend Treatment for 'date'***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



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.

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. There are a few items included in the system but more can be added 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. When you select a stock item the default quantity is calculated as 1. If you want to select more than 1, hold down the SHIFT key before clicking on the Stock item and then type in the quantity sold.

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 physiotherapists 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.

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.

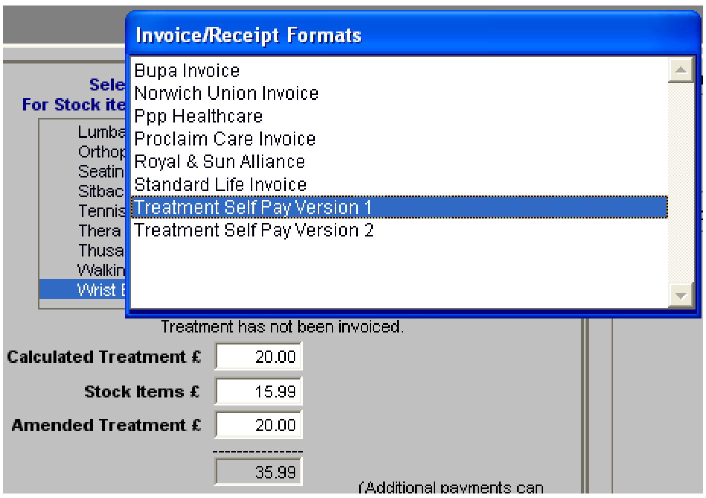
Invoice

The number in the *Account to Invoice* field would normally be 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 out an invoice. If you click on ***Yes***, a further screen will appear as below.



Double click on the treatment invoice line, and then select where you wish to print. The system creates an invoice, showing the amount the patient has paid. As well as the invoice, a receipt is also created and allocated to the invoice to show that the patient has paid the bill.

Invoice Outstanding Treatments

The ***Invoice Outstanding Treatments*** button operates in a similar manner as the ***Invoice This Treatment*** button. However, it provides a list of all outstanding treatments, from which you can select which ones you wish to invoice.

Example

For instance if you are VAT registered and you are going charge £13 for the treatment and £14 for stock, the system will update the accounts with:

- Physiotherapy treatment £13.00
- Stock items £11.91
- VAT £ 2.09

When the invoice is created, the physiotherapy treatments are posted automatically to the **4000** Analysis code and the stock items to the **4050** analysis code. Since this physiotherapist is VAT registered (but VAT exempt for Treatments), the breakdown of the invoice when updating the analysis codes is as follows:

1100	Debtors	£ 27.00
4000	Physiotherapy analysis code	£ - 13.00
4050	Stock analysis code	£ - 11.91
2200	Sales VAT	£ - 2.09

If you were not VAT registered the updating would be as below:

1100	£ 29.00
4000	£ -15.00
4050	£ -14.00

Now say the patient is only going to pay £15.00 of the bill immediately.

This £15.00 will create a receipt for £15 and deduct this from the outstanding balance on the sales invoice, whilst increasing the patient’s outstanding balance by £12.00 on the customer record.

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.

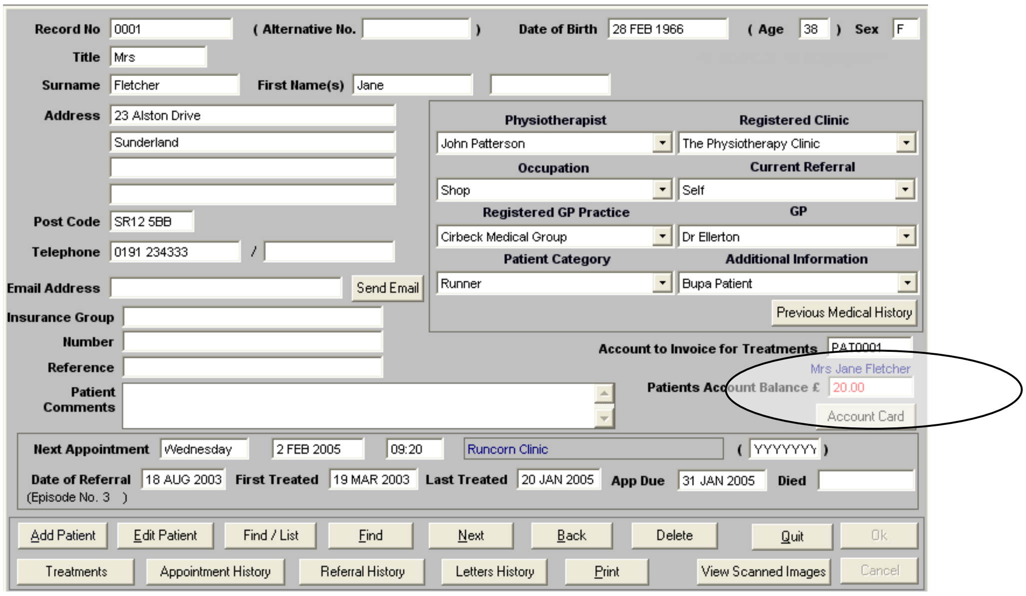
The updating which takes place on the nominal ledger and analysis codes is as follows:

- 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.

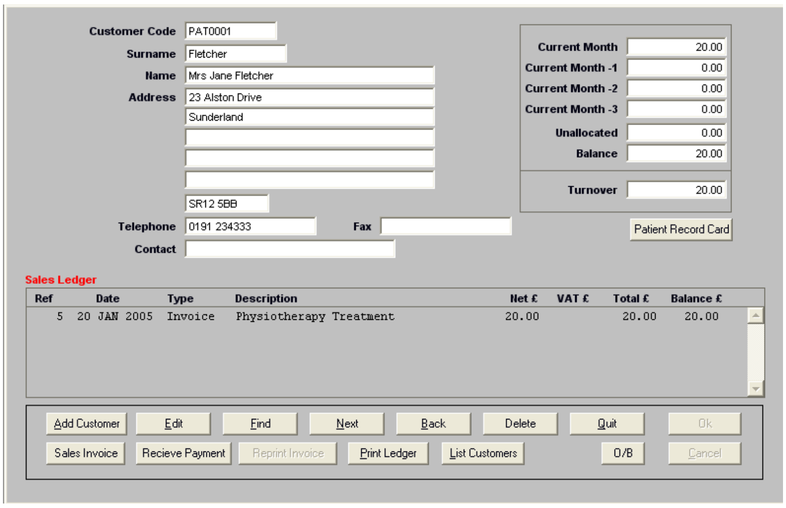
PATIENT ACCOUNT CARD

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).



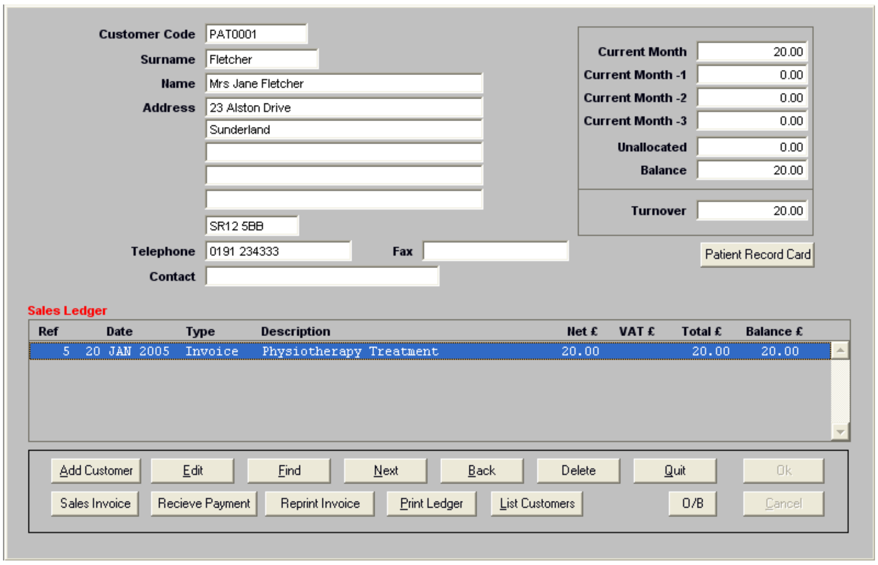
The *Account Balance* box shows the outstanding balance owed by the patient.

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.



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.



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

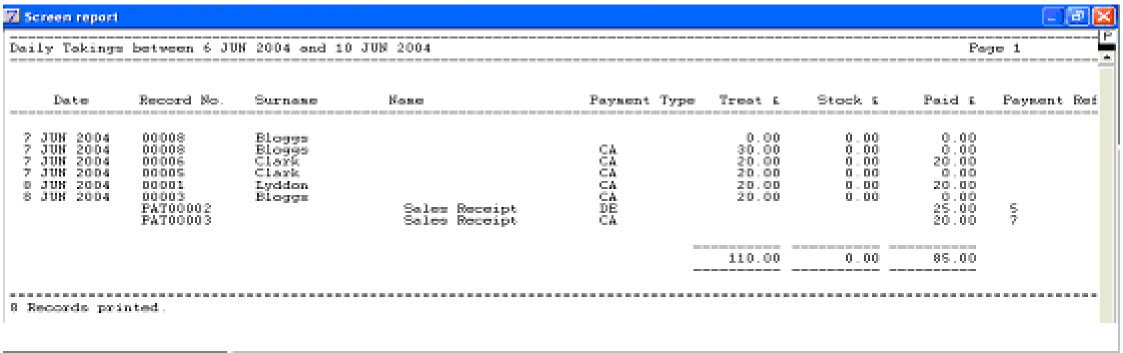
The daily takings report produces a list of all payments received between selected dates.

To obtain this report, select “Daily Takings Report” from the Physiotherapy 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 physiotherapist.

Enter the dates you wish the report to run over, select the physiotherapist, 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.



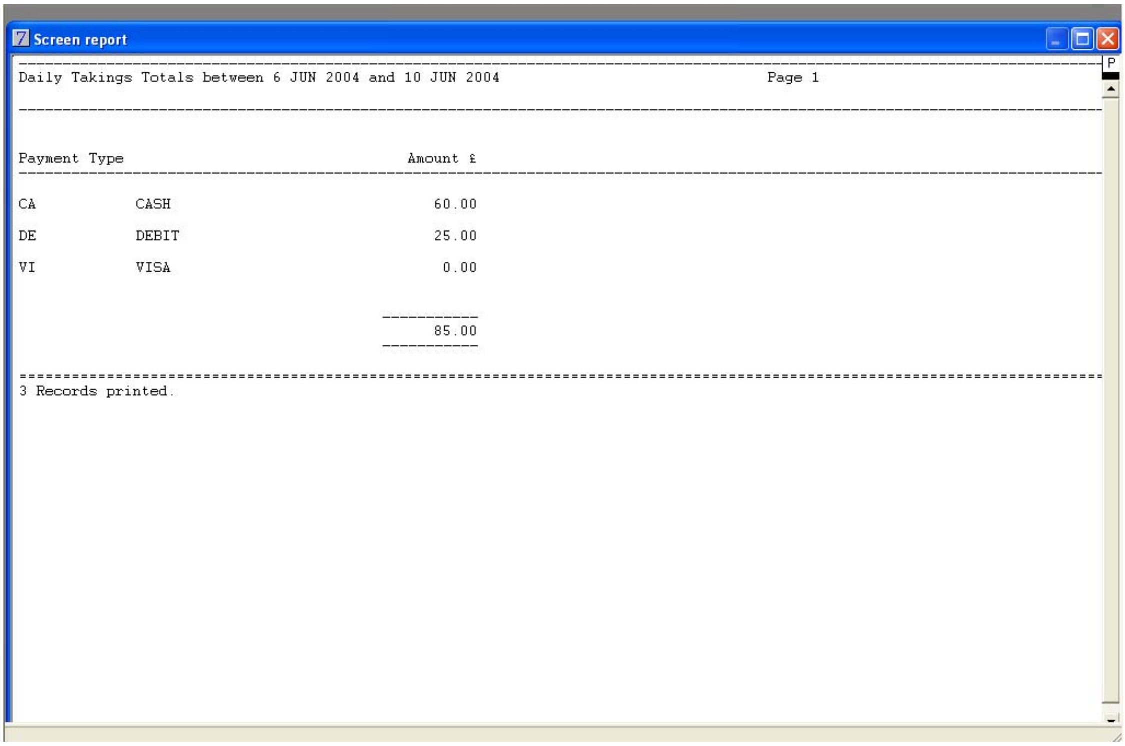
Screen report

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

Date	Record No.	Surname	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	DE			25.00	5
	PAT00003		Sales Receipt	CA			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
		85.00

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
- Overdue accounts

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.

{PFNAME}
{PFAD01}
{PFAD02}
{PFAD03}
{PFAD04}
{PFPOST}
Tel. {PFTEL1}

Details of your practice

{DOCNAME}
{DOCAD01}
{DOCAD02}
{DOCAD03}
{DOCAD04}
{DOCAD05}

GP details

{#D}
Re: {PNAME}
Date of Birth: {PDOB}
Address: {PAD1} {PAD2} {PAD3} {PAD4} {PPOST}

Patient details

Dear {DOCDEAR},

I am writing to inform you that I am providing physiotherapy 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.

Tynedale Physiotherapy
56 Whiterocks Grove
Whitburn
Sunderland
Tyne and Wear
SR6 7LL

Tel. 0191 5294783

Dr Ellerton
Cirbeck Medical Group
Tyneside Health Centre
Bridge Lane
South Shields
Tyne And Wear
NE4 6FF

20/01/2005

Dear Dr Ellerton,

Re: Mrs Jane Fletcher
Date of Birth: 28/02/1966
Address: 23 Alston Drive Sunderland SR12 5BB

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

Body of letter

We have supplied 5 sample letters for you to try

GP letter informing them that patient has self referred

> {PTITLE} {PSUR} is attending Tynedale Physiotherapy on a self-referral basis. There referral was received on {PTAKEN_ON} and treatment started on the {PFIRSTSEEN}.
>
> I would be glad to arrange a meeting to discuss any future requirements that you may have for your patients, pending this please find enclosed some business cards. Tynedale Physiotherapy is happy to receive your referrals.
>
> Should you have any questions or queries please do not hesitate to contact myself, or a member of the team at the address below.

GP Referral confirmation letter.

> Thank you for referring {PTITLE} {PSUR} to Tynedale Physiotherapy. Their referral was received on {PTAKEN_ON} and their treatment started on the {PFIRSTSEEN}.
>
> I would be glad to arrange a meeting to discuss any future requirements that you may have for your patients, pending this please find enclosed some business cards. Tynedale Physiotherapy Limited is happy to receive your referrals.
>
> Should you have any questions or queries please do not hesitate to contact myself, or a member of the team at the address below.

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.

Recall

It has been several months since you were treated at Tynedale Physiotherapy. We hope you are well and not experiencing any problems. However, should you feel that you need more treatment or need any advice please do not hesitate to contact us for an appointment..

Contract referral letter to patients employer

Before printing a standard letter you can opt to edit it first allowing you to fill in diagnosis, examination and treatment details. Alternatively, if these have all ready been entered in the treatment notes you could plot these fields on the letter and the software would automatically print them.

Thank you for referring {PTITLE} {PSUR} to Tynedale Physiotherapy. His referral was received on {PTAKEN_ON} and his treatment started on the {PFIRSTSEEN}. Initially he attended complaining of

On examination

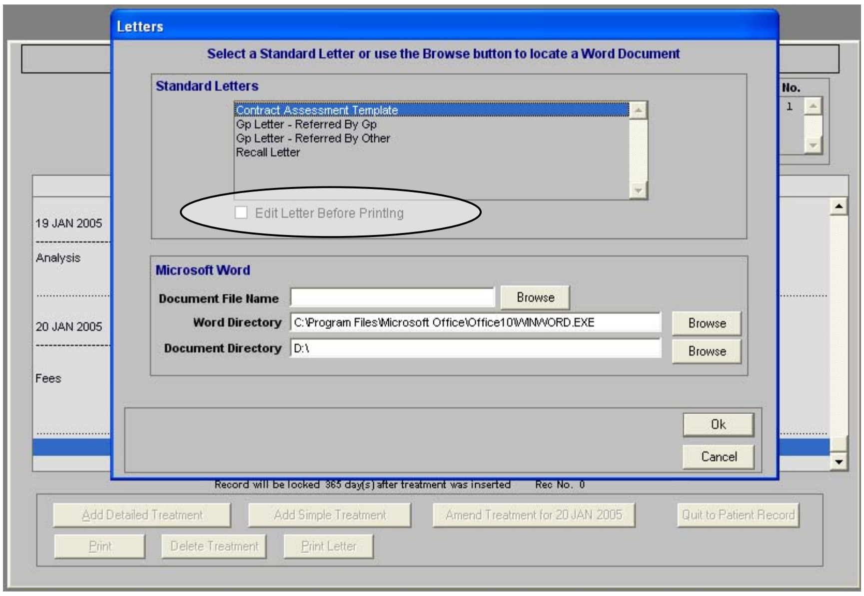
Clinically it would appear that {PTITLE} {PSUR} has

I have treated him with

Should you have any questions or queries please do not hesitate to contact myself, or a member of the team at the address below.

PRINTING STANDARD LETTERS

To create a letter, on the Patient Record screen click on the ***Treatments*** button to bring up the treatment history screen, then click on the ***Print Letter*** button at the foot of that screen. This brings up a pop-up screen as shown below, with a box titled Standard Letters. The box contains a drop down list of the letters whose contents are shown on the previous 2 pages. (Using Word is explained on Page 7-14.)



You may want to edit the letter from the original template before printing it. To do so, click in the square beside the message *Edit Letter Before Printing*. Then double click on the type of letter you wish to print.

A draft of your letter appears on screen, which you can amend as you wish. The unique particulars have not yet been entered, instead the codes are given in the curly brackets {}. Change the body of the letter as you wish, and delete any codes you do not want.

When you are satisfied with the letter, click on the ***Ok*** button. Then select the location for the print out.

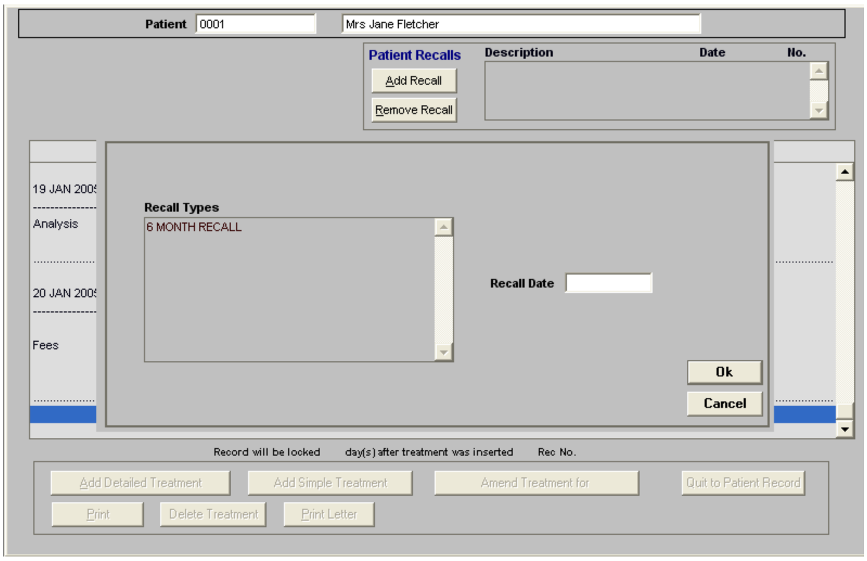
<u>Left Margin</u>

The left margin is preset at 2, but can be altered if necessary to suit your pre-printed paper or window envelopes. See Page 7-11 for duplicating standard letters.

PATIENT RECALLS

Defining the recalls

You can define the type and frequency of recalls you wish to send. To do this, click on the ***Add Recall*** button on the treatment history screen. This brings up a pop-up menu listing the recall templates.



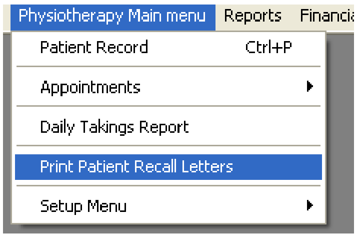
Select the type of recall from the menu by clicking on the item in the list, and then enter the date. (If you have set up a recall template (see Page 7-12), you can select this here.) Click on the ***Ok*** button to add this recall information for your patient, or click on the ***Cancel*** button to revert to the treatment history screen.

After a recall has been inserted you cannot amend the date. If you need to change any of the details remove the recall and add it again. To do this, click in the *Patient Recalls* box on the recall you want to remove, and click on the ***Remove Recall*** button. Then click on ***Ok*** when prompted by the question 'Are you sure you wish to remove this Recall'.

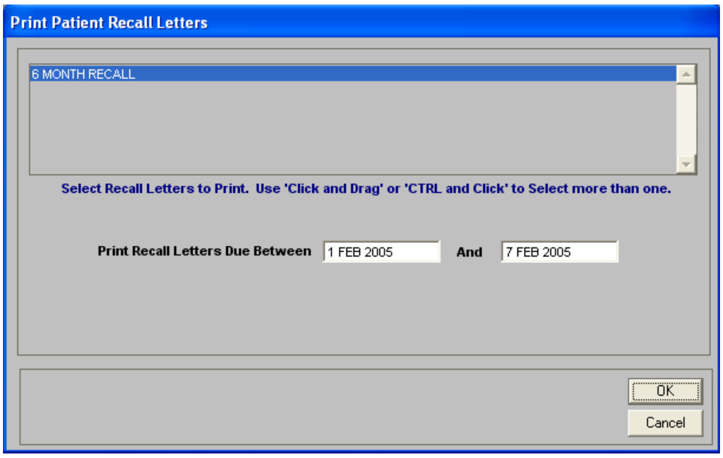
Printing recalls

You can use "Print Patient Recall Letters" on the Physiotherapy Main menu to print all outstanding recall letters of a certain type and over a chosen date range.

First, use the ***Add Recall*** button on the treatment history screen to define recalls for as many patients as you wish. Next, select "Print Patient Recall Letters" from the Physiotherapy Main menu as below.



This brings up a new screen.



Click on the type of recall to be printed, and amend the dates to give the required date range. Click on the ***OK*** button. You will be asked if you wish to e-mail the recalls to patients whose e-mail address is on the system. For now, select ***No*** to this, then click on ***Yes*** to print the recalls (see Page 7-16 if you wish to e-mail the recall). Finally chose where you wish to print the letters.

When the system has sent all the reminders described in the Recall template it will automatically delete the recall from the patient's recall list. However, if a patient responds to a recall which normally includes more than one reminder, it is up to you to remove the recall with the ***Remove Recall*** button, otherwise the system may continue to send letters to the patient. This is not an issue with recalls that only have one reminder as the system automatically deletes the recall when the letter is printed.

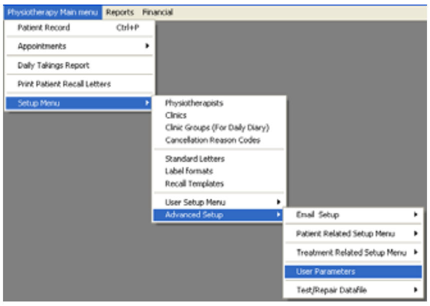
SCANNED CORRESPONDENCE

If you have a scanner, you can scan in any correspondence received, and link the files of these images to the relevant Patient Record.

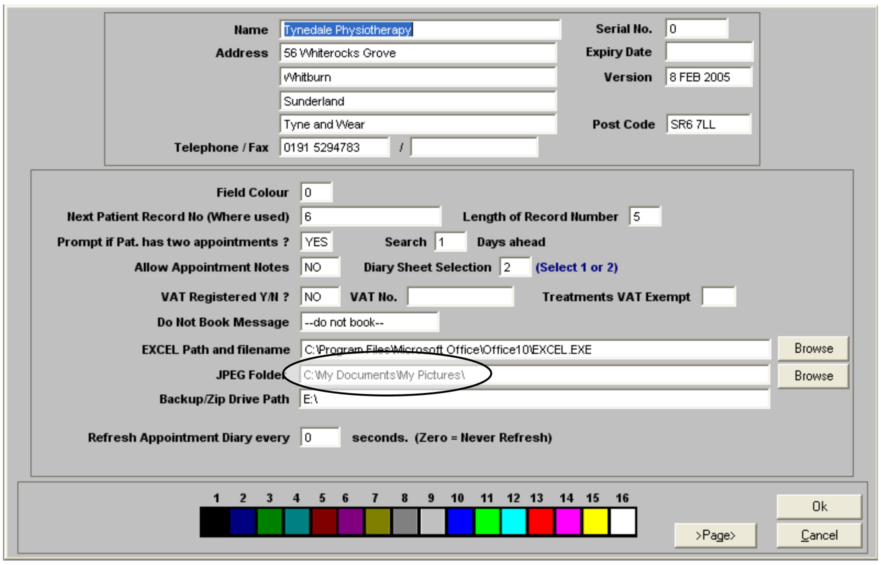
First, scan in any correspondence as outlined in the instructions provided with the scanner and associated software. Note the drive, directory and folder where the images are stored.

Location of scanned images

Then you must inform the Physiotherapy system of this location. To do this, on the Physiotherapy Main menu, select "Setup Menu", then "Advanced Setup" and finally "User Parameters", as below.



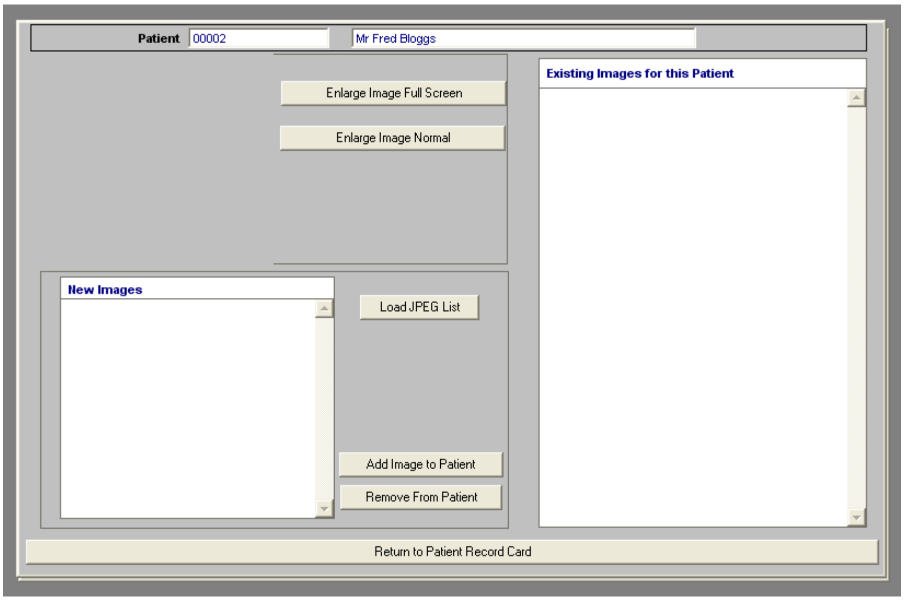
This opens a new screen, which contains a field (circled below) for entering the drive, directory and folder noted above.



Enter this pathname in the format C:\directory\folder, and click on ***Ok***.

Linking image to patient record

Now when you click on the ***View Scanned Images*** button on the Patient Record screen, and then click on the ***Load JPEG list*** button on the new screen, your scanned images appear in the *New Images* box.



You can now select the image you wish to associate with the patient, and click on the ***Add Image to Patient*** button. You are then given the option to delete the image from its original location. Should you click on ***Yes***, the image will be moved from the original location to the Physiotherapy system. If at a later date, you decide to remove the image from the Patient Record and click on the ***Remove From Patient*** button, the image will be copied back to the original folder.

A larger view of an image is available by selecting it and clicking on the ***Enlarge Image Full Screen*** button. Clicking on the ***Enlarge Image Normal*** button creates a large image which you can scroll around for greater detail.

LETTERS HISTORY

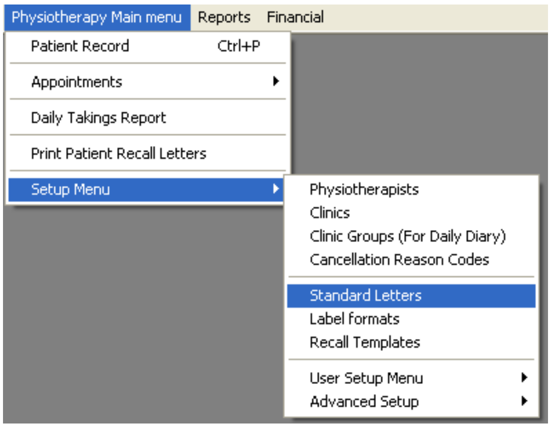
You can see exactly what letters have been sent to a patient and when by clicking on the ***Letters History*** button on the Patient Record screen. This provides a list at the top of the screen, from which you select the letter you wish to appear in the box below.

SETTING UP YOUR OWN CORRESPONDENCE STYLES

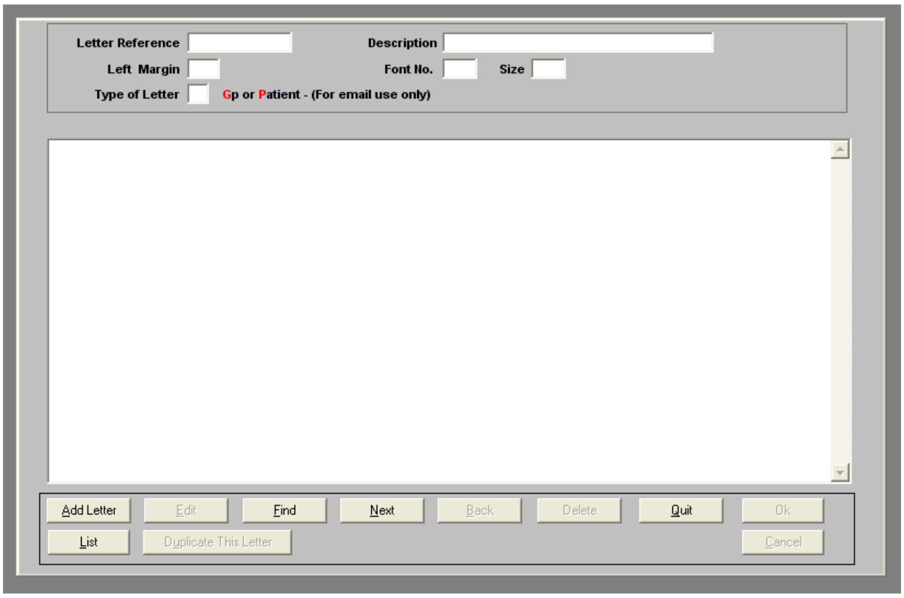
As well as the standard letters we have provided, you can create as many of your own letter templates as you wish.

Create new standard letters

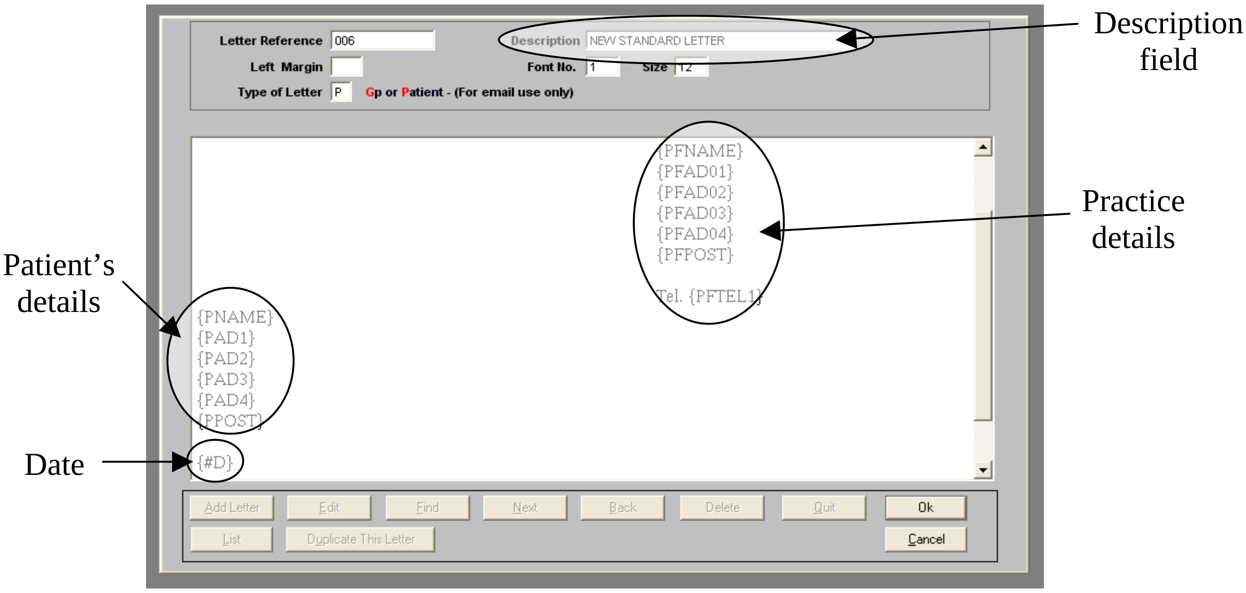
To create new standard letters, on the Physiotherapy Main menu select “Setup Menu” and then “Standard Letters” as below.



This opens a new screen as below.



Click on the ***Add Letter*** button to create a new template with the codes for your address and the patient's address already entered, as below.



In the *Description* field, enter a description which you will use to find this template later. Then add any left margin (we suggest 5) and the change font size if required. Now you can type in whatever you wish as the body of the letter. A list of codes for adding patient, practice or appointment details starts on Page 7-19. When you are satisfied with your letter, click on ***Ok***.

This letter is now added to the list of standard letters available using the ***Print Letter*** button on the treatment history screen.

List

On this set up standard letters screen, the button ***List*** creates a print file listing the standard letters on the system along with their reference.

Duplicate

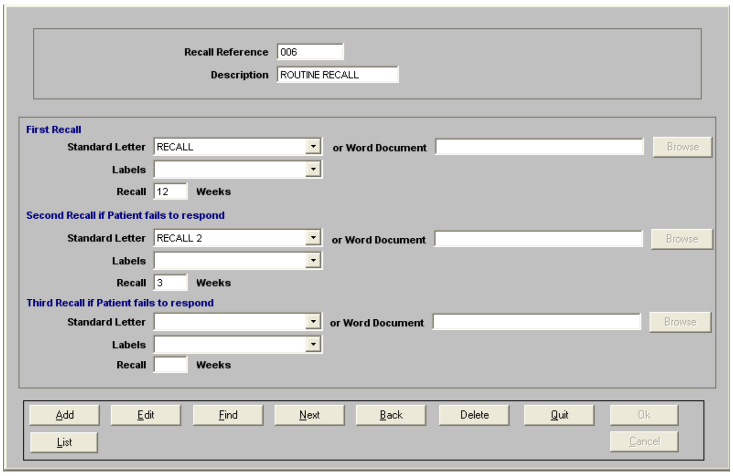
When creating new standard letters you can start from the blank letter as described above, or you can start from an existing standard letter already created. To use an existing letter as a start point, use the ***Find***, ***Next*** and ***Back*** buttons in the usual manner to find the letter you wish to start from. The ***List*** button is useful to see what letters already exist and their reference numbers.

Then click on the ***Duplicate This Letter*** button. Now enter a new description in the *Description* field and change the left margin and font if required. Now you can make your changes to create a new standard letter. Finally, click on the ***Ok*** button.

Create recall sequence

Each recall sequence can consist of up to three reminders per recall and you can define which of your standard letters is used for each of the three recall letters.

To create a recall sequence, on the Physiotherapy Main menu select “Setup Menu” and then “Recall Templates”. This opens a new screen as below, this view shows it already filled in.



In the above example the patient will be automatically sent the standard recall letter after 12 weeks. If they do not respond to this recall, a second letter will be sent 3 weeks later. This is a new letter which has been created by selecting “Setup Menu” then “Standard Letters” on the Physiotherapy Main menu, and given the description RECALL 2.

To create your own recall sequence, first click on the ***Add*** button. Now enter a new description in the *Description* field. Use the drop down lists to select which letter to send. Do the same in the other *Letter* fields, and enter the length of time to wait between sending reminders in the *Default Weeks* fields. Finally, click on the ***Ok*** button.

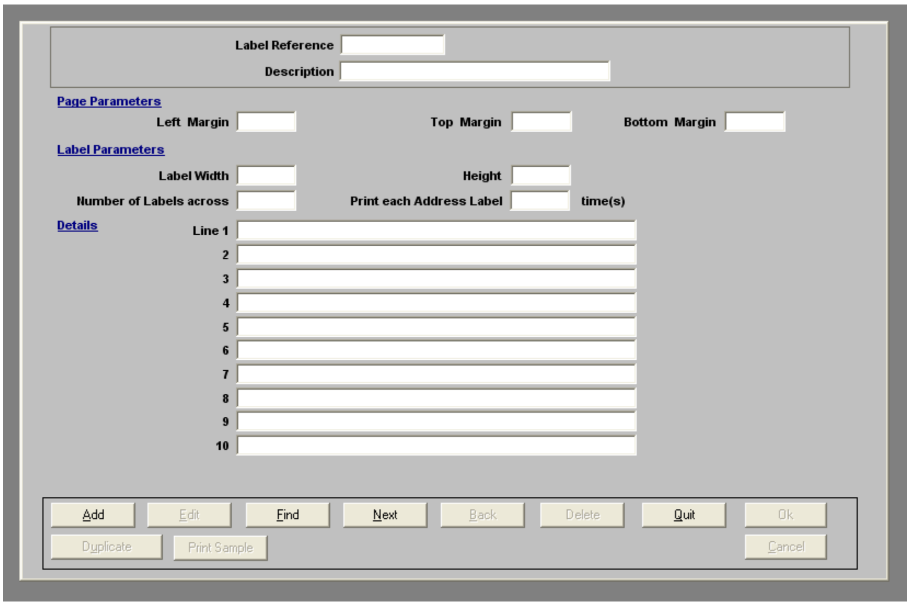
Alternatively you can specify Word files containing your recall letters. This is done in the same manner as for other letters, see Page 7-14.

If you are not using window envelopes you can also select a Label format so the system will automatically print labels after printing the recalls. Alternatively, if you prefer to send cards instead of letters you can leave the letter reference blank and select only the label. See below for details of creating labels.

Patients can be given as many different recalls as required via the treatment history screen.

Create address labels

To create address labels, on the Physiotherapy Main menu select “Setup Menu” and then “Label Formats”. This opens a new screen as below.



Here you can set-up labels to be printed with patients’ names and addresses. The label specifications entered here can be used to produce labels from the Recall facilities and the “Print Patient Labels” option on the Reports menu.

Enter a description and reference in the top section.

In the Page Parameters section, the *Left Margin* is the distance in centimetres (but may vary depending on your printer) from the left edge of the page to the left edge of the first column of labels, and the *Top Margin* the distance from the top of the page to the top of the first row of labels.

In the Label Parameters section, the *Label Width* and *Label Height* are the dimensions of the individual label, and the *Number of labels across* is the number of labels in each row. These figures presume that each label ‘touches’ the next one on the appropriate edge(s). If this is not the case you may have to make some minor adjustments to the label dimensions or margins so that your text is positioned correctly on all the labels on a sheet.

In the *Print each Address Label* field, enter the number of times you want each individual label to be printed.

In the ‘Details’ section enter the field codes in brackets {} for the information you require on the label. These would normally be {PNAME}, followed by {PAD1}, {PAD2} etc and finally {PPOST}. See Pages 7-19 to 7-21 for a list of the field codes. Standard text can also be entered here, for example ‘For the attention of’.

Clicking on the ***Print Sample*** button shows the layout you have specified.

Tip: Labels are relatively expensive. If you need to do a test print to check layout etc. do it on a sheet of plain paper, and then hold the paper, with a blank sheet of labels behind it up to the light. A good function to use to test label layout and alignment is by selecting “Print Patient Labels” on the Reports menu (see Chapter 2 of the Advanced Manual) as from here you can easily select a small number of patients.

USING WORD TO CREATE LETTERS

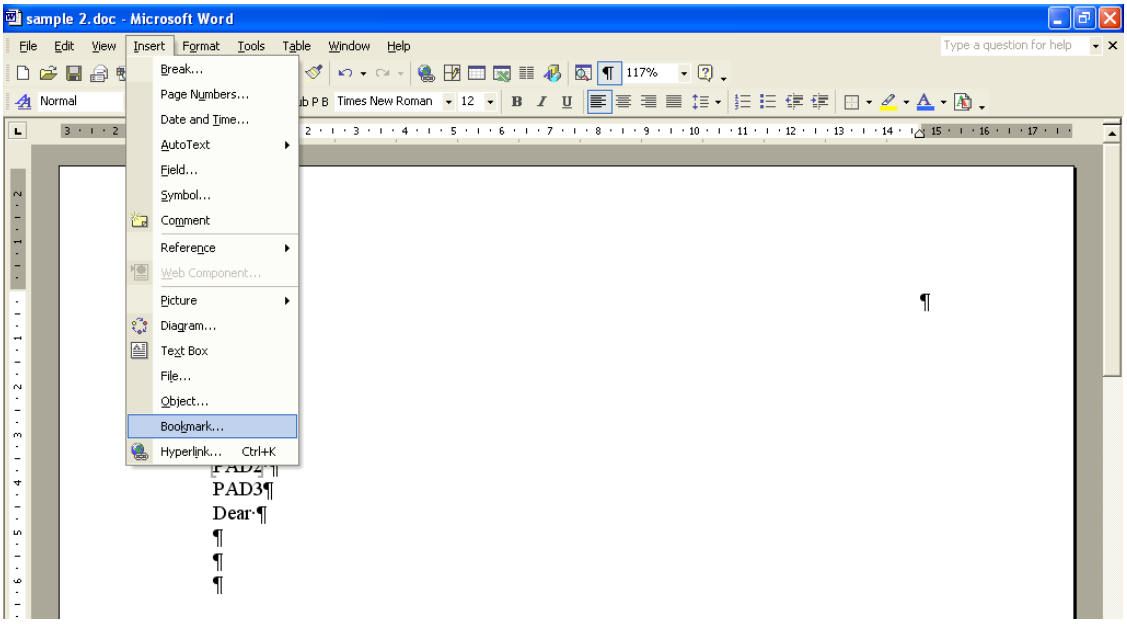
As well as using the methods outlined above for creating correspondence within the Physiotherapy system, you can also create correspondence using Microsoft Word. This gives you the freedom to use the formatting and features of Word in creating your letters, while still incorporating information stored on the Physiotherapy system.

Create Word file

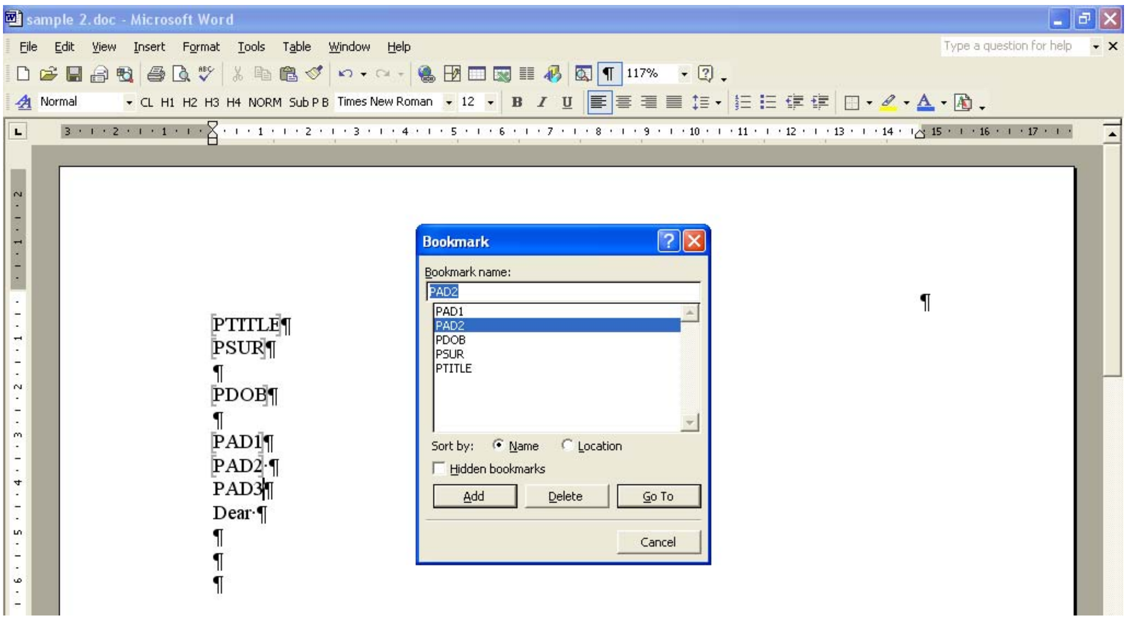
First of all you must create a file in Microsoft Word. You could do this using straight text to enter patient details. However, if you create a file using field codes for patient (and other) information, you will be able to use it as a template to send to more than one patient.

To insert the field codes, type the codes you wish to insert in your Word document, omitting the brackets {}. A list of codes is at the end of this chapter.

Then select the first code. Be sure that you select only the code; hold down the SHIFT key and use the arrow keys to ensure that you have not included any spaces or return characters at the end of the code. Then press CTRL + C to copy the code. Finally, move the cursor to the tab “Insert” on the menu line at the top of the screen, hold down the left mouse button and drag the mouse down until “Bookmark” is highlighted as shown below, then release the left button,.



A pop-up screen appears as below.



Click in the field *Bookmark name* and type CTRL + V to paste in the field name you copied earlier. Then click on the ***Add*** button.

Repeat this action for all the field codes in your Word document. If you need to add the same field code twice, you must enter the second occurrence as ‘code_2’. To enter the date, use TODAY (the code #D does not work in Word).

Save your document and note the pathname where the document will be filed.

Finally you must close Word. The next steps will fail if you do not.

Enter pathname

On the Patient Record screen, click on the ***Treatments*** button, and then on ***Print Letter***. This opens the standard screen for selecting letters, see Page 7-5.

In the Microsoft Word section, enter the name of your file and the pathname as noted above. You must also enter where the Winword.exe file is held (this is the file that runs Word). It is likely to be on your C drive. Click on the browse button for help.

Print Word file

Finally click on ***Ok*** on this letters screen. The system opens Word, creates a merged file entering the patient's details in the positions of the field codes, sends this file to your default printer, and then closes Word.

Record of letter

A copy of the letter is available by clicking on the ***Letters History*** button on the Patient Record screen.

SENDING E-MAIL MESSAGES

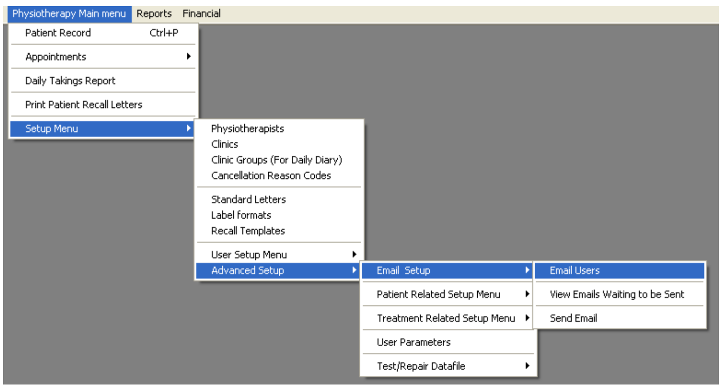
There are two ways of sending e-mails:

- Selecting "Print Patient Recall Letters" on the Physiotherapy Main menu, see Page 7-7
- Creating a one-off message.

First you need to register on the system the people authorised to send e-mail messages and enter their e-mail addresses.

Register e-mail senders

On the Physiotherapy Main menu, select "Setup Menu" followed by "Advanced Setup", then "Email Setup" and finally "Email Users".



The information required on this screen is reasonably self-explanatory. It enables you to set up details of those members of your staff who will send e-mails from the system; the e-mail address they are sent from; and who, if anybody, automatically receives a copy of an e-mail from that person.

The field *SMTP Server* is your address as provided by your Internet Service Provider and should be part of the technical information you have received from them. Without an **EXACTLY** correct entry here your e-mails will not get sent. If you have any difficulty in finding this address please first contact your Internet Service Provider. If you are still having problems, if we can help then we will.

The *Text to Add* field is for inserting any concluding text to all e-mail sent by this person. It could be the name of your practice, a promotional message, a seasonal greeting etc.

Create e-mail recall message

Ensure that the patient's e-mail address has been entered in the *E-mail Address* field on the Patient Record screen.

Then create your recall letters as outlined on Page 7-6 under defining the recalls. Next, select "Print Patient Recall Letters" on the Physiotherapy Main menu. This time, when asked 'Do you want to e-mail letter to patients that have an e-mail address', click on ***Yes***. Type the ? character and press the TAB key in the field *Send Email from* to select the registered sender, then click on ***Ok*** to place your e-mail in the queue to be sent.

IMPORTANT NOTE: Although the patient's letter history is updated with the details of the e-mail, there is no record anywhere that the e-mail has actually been sent. If you need to be able to verify that the e-mail has been sent, we suggest that you 'CC' a copy to your practice at a different e-mail address than that used for sending the e-mail.

Create one-off e-mail message

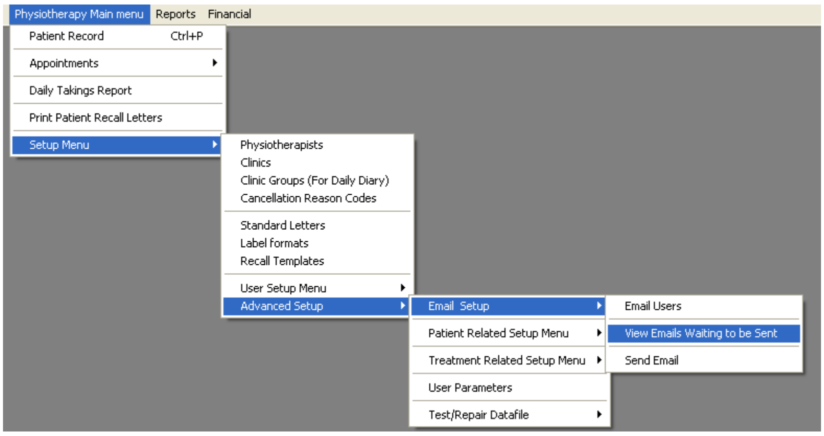
Alternatively, you can create a stand-alone message on any subject. Again, ensure that the patient's e-mail address has been entered in the *E-mail Address* field on the Patient Record screen. Next, click on the ***Send Email*** button beside the *Email Address* field. This opens a new screen.

Select the e-mail sender, any CC recipient, and enter a subject for the message. Now you can type in your message.

Finally click on the ***Ok*** button to place your e-mail in the queue to be sent.

Send e-mails

The e-mails created above are held in a queue. To send them, on the Physiotherapy Main menu, select “Setup Menu”, followed by “Advanced Setup”, then “Email Setup” and finally “View Emails Waiting to be Sent”.



On this new screen, the top section lists all e-mails waiting to be sent. Here you can select individual e-mails, view their contents, and edit or delete any as required, then click on the button ***Send Email Now***. This dials out, contacting your ISP and sending all the e-mails listed in the top portion of the page.

Alternatively, select the “Send Email” option from the same “Email Setup” menu.

Caution for customers using dial up connections: After sending e-mails, always check that your telephone line has closed down. You can do this by checking at the foot of the Windows screen in your Task Bar by the time. If you see an image of two monitors with green screens the line is still connected. Wait about ten seconds if in the interval they have not lit up or flashed you can close the line by right clicking on them and then left clicking on “Disconnect” from the pop-up menu. If the monitors are lit up or flashing, wait until they have been ‘quiet’ for about 10 seconds.

FIELD CODES

Most fields of the Patent Record screen, and some others, have been allocated a unique identifying code. This is the code which you enter when creating letters and recalls to specify that you wish the contents of that field to be entered into the letter.

Patient Details

PNHSNUMBER	NHS number
PUSERREF	Record number
PSUR	Surname
PFORE1	First name
PFORE2	Second name
PTITLE	Title
PNAME	Full name
PAD1 PAD2 PAD3 PAD4	Address lines 1 to 4
PPOST	Post code
PTEL1	Telephone 1
PTEL2	Telephone 2
PDOB	Date of birth
OCNAME	Patients occupation
PLASTVS	Last treated date
PTAKEN_ON	Referral date
PLASTLETTER	Date last letter sent
PFIRSTSEEN	First treated
PTARGETAPP	Target appointment date
PNXTAPPOINTDT	Next appointment date
PNXTAPPOINTTM	Time

The SITE fields below will show the Appointment Clinic name and address if used from the "Appointment Reports" option on the Reports menu, and the patient's usual clinic name and address if used anywhere else.

SITENAME	Clinic name
SITEAD01 SITEAD02 SITEAD03 SITEAD04 SITEAD05	Clinic address lines 1 to 5

DCNAME	Usual physiotherapist
TTDES	Selected treatment name if used from recalls or last treatment if used anywhere else

OUTDES	Last outcome
PREFERRAL	Source of referral code
PREF_NAME	Referrer’s name
PREFERRALNUM	Referral number
PINSURANCE1	Insurance company
PMEDICAL_HIST	Patient’s medical history
SURAD01	
SURAD02	
SURAD03	If GP practice details are coded, address lines 1 to 5
SURAD04	
SURAD05	
DOCNAME	
DOCAD01	
DOCAD02	
DOCAD03	If GP details are coded, name and address lines 1 to 5
DOCAD04	
DOCAD05	
DOCDEAR	
PDOCTORSNAME	
PDOCTORSADD1	
PDOCTORSADD2	GP name and address if not coded
PDOCTORSADD3	
PDOCTORSADD4	
CUCURRENT	Balance owed less than 1 month
CUCURRENT1	Balance owed between 1 and 2 months
CUCURRENT2	between 2 and 3 months
CUCURRENT3	3 months and over
CUTOTBAL	Total balance owed
CUTURNOVER	Turnover this year

<u>Practice details</u>

PFNAME	
PFAD01	
PFAD02	
PFAD03	Your practice name and address
PFAD04	
PFPOST	
PFTEL1	Practice telephone number

Patient's last treatment

TRDATE	Date of treatment
TRPATIENTCOMMENTS	Patient comments
TRCOM01	Analysis
TRTREATMENTPLAN	Treatment plan
TRNOTES1	Description of fees charged
TRNOTES2 – 10	Calculated treatment notes
TRADDNOTES2 – 10	Your additional notes
TRINSPECTION	Diagnosis
TRTREATPRICE	Calculated treatment price
TRACTUALDRUG	Stock Item price
TRACTUALPRICE	Actual treatment price
TRAMOUNTPAID	Amount paid by patient
TRINVNO	Invoice number

Appointment Details

These only apply to appointment reports.

ATTIME	Time of appointment
ATDATE	Date of appointment

Other

#D	Today's date according to your computer
#T	Current time according to your computer's clock

(#D and #T only work with Standard letters. DATE can be used with Microsoft word to display today's date.)

Recall Fields

RLTDATE	Date recall due to be printed.

Further codes are given in Chapter 4 of the Advanced Manual, under the Templates heading.

CHAPTER 8 – GENERAL SET UP

INTRODUCTION

This chapter contains the more commonly used set-up routines which are not already covered in previous chapters. The options available under the “Setup Menu” on the Physiotherapy Main menu are:

- Physiotherapists (described in this chapter)
- Clinics (described in this chapter)
- Clinic Groups (described in this chapter)
- Cancellation Reason Codes (described in this chapter)
- Standard letters (described on Page 7-10)
- Label formats (described on Page 7-13)
- Recall templates (described on Page 7-12)
- User Setup Menu (described in this chapter)
- Advanced Setup for sending e-mail (see Page 7-16). This is also used for setting up your own patient and treatment related details (see Chapters 8 to 10 of the Advance Manual).

The physiotherapist and clinic options give you opportunity to reserve days as holidays, for which diary sheets are not inserted.

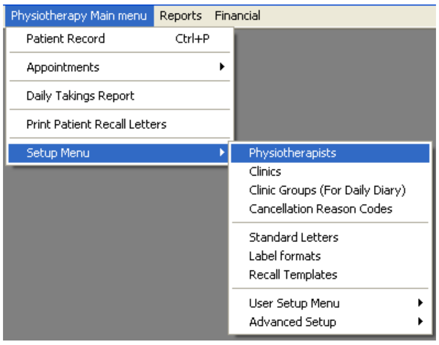
Also explained here are the following options on the File menu:

- Login
- Change Password
- Quick Backup
- Backup Data
- Restore Backup.

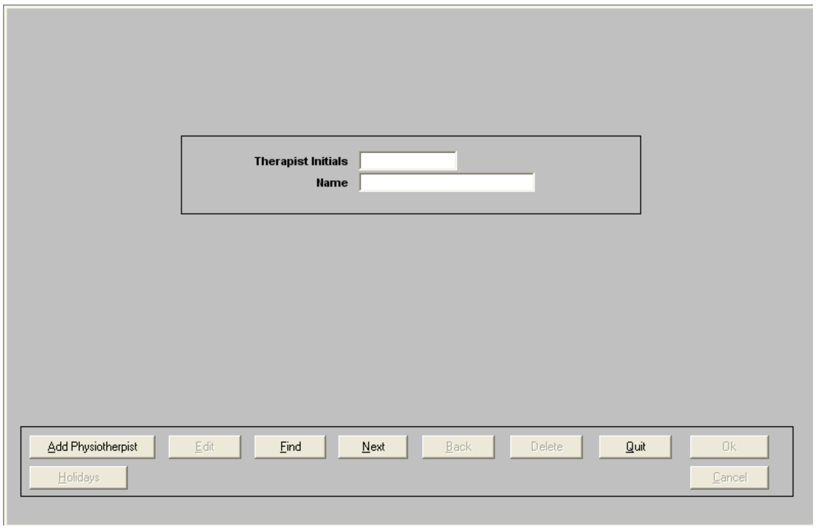
SET UP MENU OPTIONS

Physiotherapists

When you started using the system with real data, you entered a list of physiotherapists in the quick set-up routines (see Chapter 2). Should you wish to amend this list, you can do so using the setup menu. Select "Setup Menu" and then "Physiotherapists" from the Physiotherapy Main menu as below.



This brings up the new screen below.



On this screen you can edit the details of physiotherapists already on the system, and add new ones. To edit existing entries, use the ***Find***, ***Next*** and ***Back*** buttons to obtain the entry to be changed. Click on the ***Edit*** button, make the changes, and then click on ***Ok***.

When you click on the ***Add*** button, the system allocates a number in the *Physiotherapist Code* field. Enter the name of the physiotherapist in the *Name* field, then click on the ***Ok*** button.

Repeat these actions as many times as necessary to update your list.

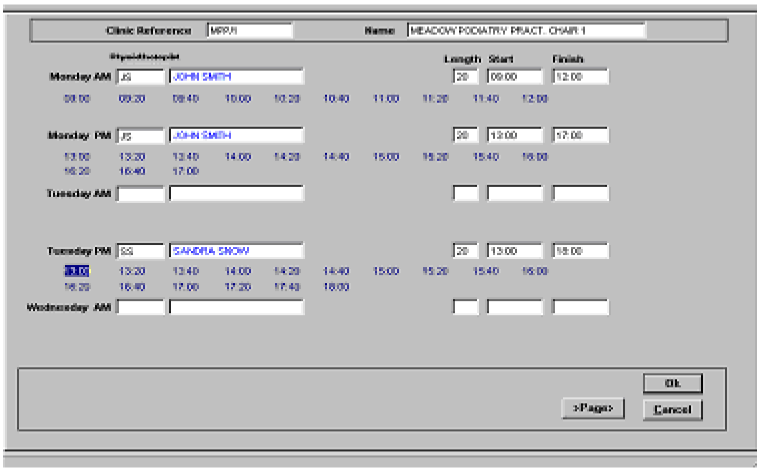
The use of ***Holiday*** button is described under the heading Holidays on Page 8-4.

Clinics

You may also have set up your list of clinics when you ran the quick set-up routines. However, if you decide to add more clinics or amend the existing details, select “Setup Menu” and then “Clinics” from the Physiotherapy Main menu. Then proceed under the same principle as the “Physiotherapists” option above. There are a few more fields to fill in most of which are obvious.

If you wish to see a list of all the clinics and their reference codes, click on the ***List*** button. This produces a report which you can print to screen or send to a printer.

The ***Appointment Diary Template*** button allows you to define the standard timetable for a particular clinic (or chair).



In this example Meadow Room 1 has John Smith working all day Monday, and Sandra Snow working Tuesday afternoon. Although the length of the appointments has been set to 20 minutes, each of those appointment times in blue can be amended.

When you select “Appointments” then “Create Diary Sheets from Templates” on the Physiotherapy Main menu, the diary sheets inserted are based on the timetable you have just defined above.

The use of ***Holiday*** button is described under the heading Holidays below.

Clinic groups

You can define up to ten groups of six clinics for selection on the daily appointment diary. To do this select "Setup Menu" and then "Clinic Groups" from the Physiotherapy Main menu.

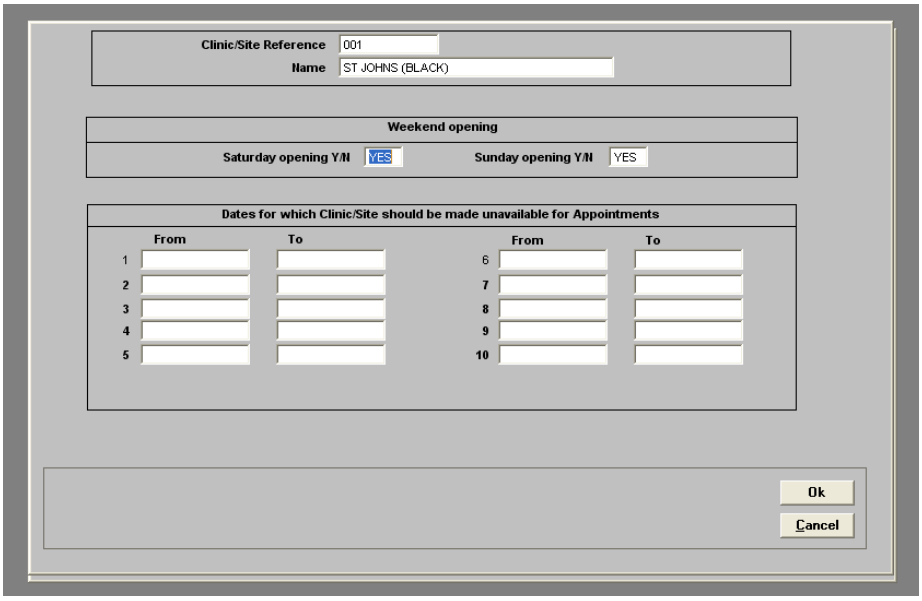
Then simply enter the codes for clinics, and give each group a descriptive name. The ***List*** button on the clinics screen will give you a reminder of the clinic codes if required.

Your descriptive names for the groups are now listed in a row of buttons at the foot of the daily appointment diary. When you click on a group button, the clinics you specified for that group are then listed on line below. Click on whichever clinic you wish to display diary sheet for that clinic.

Holidays

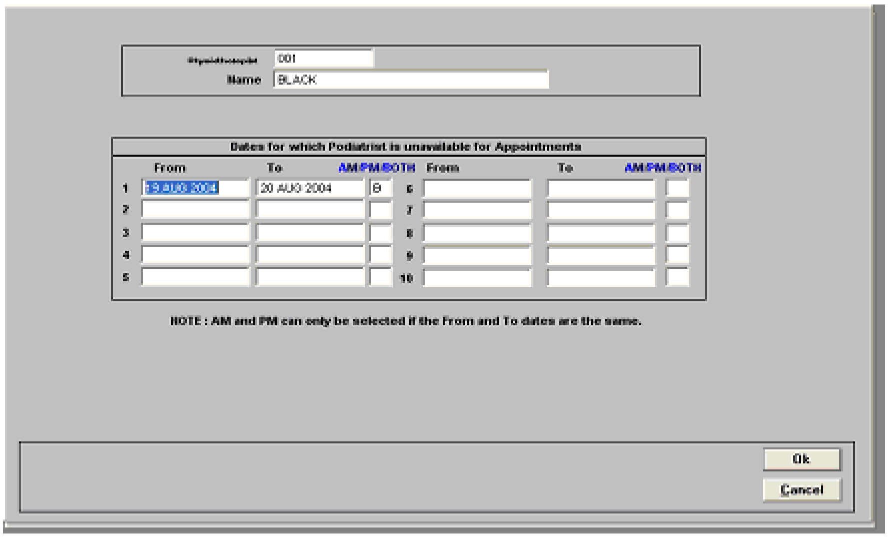
The ***Holidays*** button on the physiotherapists and clinics screens allows you to tell the system which dates should be avoided when inserting diary sheets.

When you click on ***Holidays*** on the clinic screen, you can define dates for which a whole clinic or site are unavailable eg general bank holidays. Up to 10 ranges of dates can be entered at once.



First enter whether the clinic is open at weekends. Then type in the start and end dates of each holiday period, and click on the ***Ok*** button. The system gives you the option to update all clinic records with the same details.

The ***Holidays*** button on the physiotherapist screen lets you set holidays for individual physiotherapists.



Again up to 10 can be entered as a date range. To specify a half day holiday, enter the same date in the *From* and *To* fields and type A (morning) or P (afternoon) in the next field.

To make the most efficient use of these options, you could set up all the bank holidays for the year in one clinic. Then tell the system to update all the clinics with these details. Finally go into individual physiotherapists to edit any holiday details that are specific to the individuals.

Now when you create diary sheets, the system will not insert any for dates specified as holidays.

Cancellation reason codes

You can change or add to the list of cancellation reason codes that appears when you cancel an appointment. Select “Setup Menu” and then “Cancellation Reason Codes” from the Physiotherapy Main menu. Then proceed under the same principle as for the “Physiotherapists” option on Page 8-2.

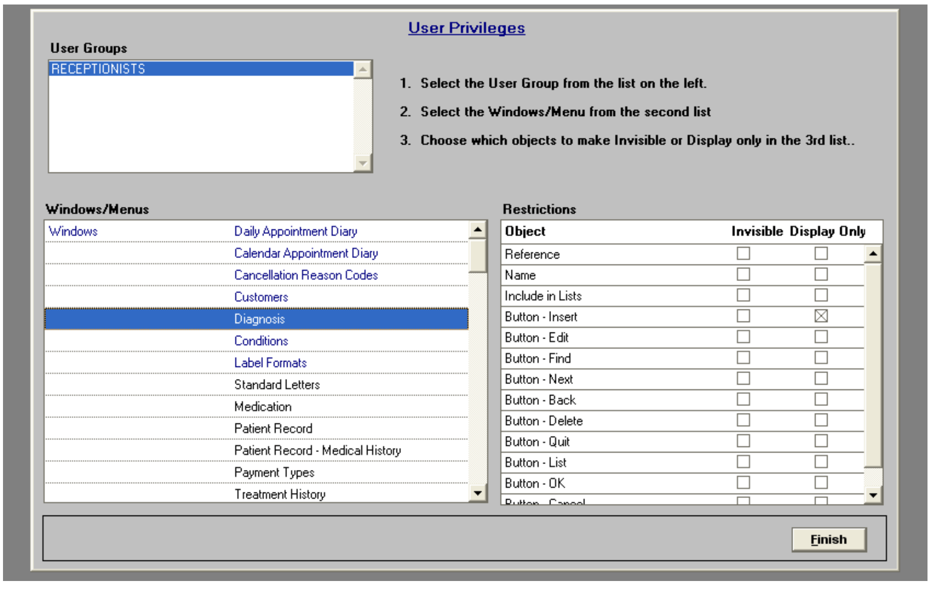
The ***List*** button creates a report of what is currently available

The reason codes can be used as search criteria for appointment reports. See Chapter 2 of the Advanced Manual for more details.

User setup menu

The user set up menu contains three options. When you select "Setup Menu", then "User Setup Menu" and finally "Users" or "User Groups" from the Physiotherapy Main menu, you can set up a list of users and groups of users using the same principle as for "Physiotherapists" option above. When setting up the Users you can also indicate which ones will have access to Treatment data.

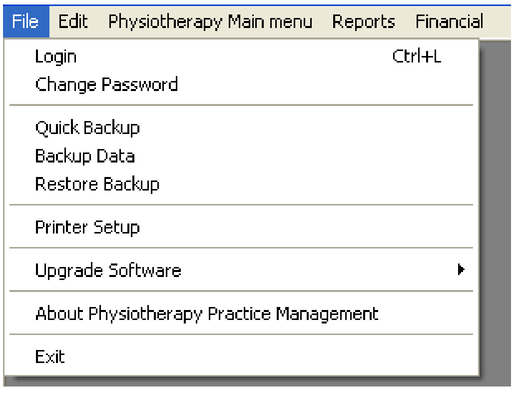
If you set up user groups, you can then use the third option "Group Privileges" to restrict use of certain features for certain groups of users. This is done by making certain menu options or buttons either invisible, or disabled.



For instance, you could have a user group called 'Reception' who could make appointments but not enter treatment details. Any amendments made here will not take effect until the user logs back into the physiotherapy system.

FILE MENU OPTIONS

Also explained here are several options on the File menu.

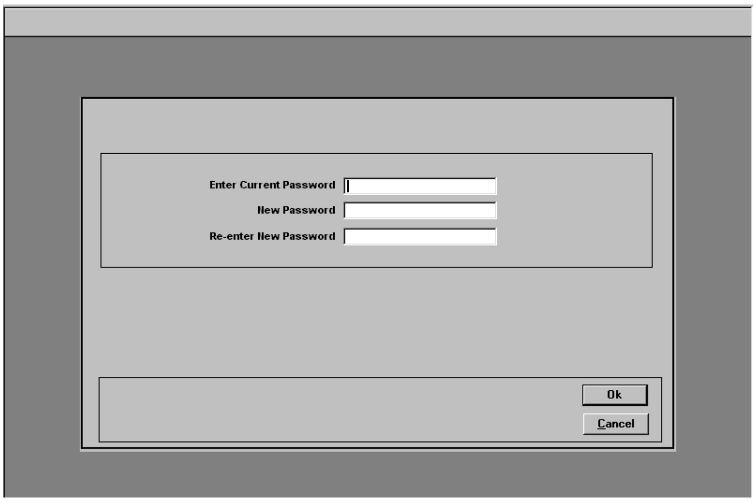


Login

This option opens the login screen for entering ID and password without having to quit the system first. It will save time when one user is logged in and another user wishes to use the system.

Change Password

This increases security by allowing you to change your password.



To change your password, first enter your current password in the *Enter Current Password*' field. Then type your new password in the *New Password* field and again, as a check in case you make a typing error, in the *Re-enter New Password* field.

If you do not already have a password, use the procedure above but leave the *Enter Current Password* field empty. If you forget your password, please contact us immediately as the situation can usually be rectified.

Note: Only you know how sensitive your data is. Consider changing your password at regular intervals.

Back up your data

There are two ways of backing up the data you have entered on the system.

- Quick Backup. This copies the data to the C drive (computer hard drive)
- Backup Data. This copies the data and JPEGS to a drive defined on the user parameters screen (eg zip drive or CD drive), see Chapter 10 of the Advanced Manual.

The Restore Backup option, restores the data you have backed up. (Please use this with caution.). It does not restore the JPEGS folder which would need to be copied across manually if necessary.

Upgrade software

The “Upgrade Software” menu is used to change the version of the Physiotherapy system. There are three options:

- Install permanent PPMS system. See Page 2-1
- Update rental serial number. This is for customers who choose to rent the system rather than buy it.
- Reset accounts. This can be used to delete all accounting information and customer balances.

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