ClinicWise User Guide

AgileWay

ClinicWise Manual

AgileWay Pty Ltd

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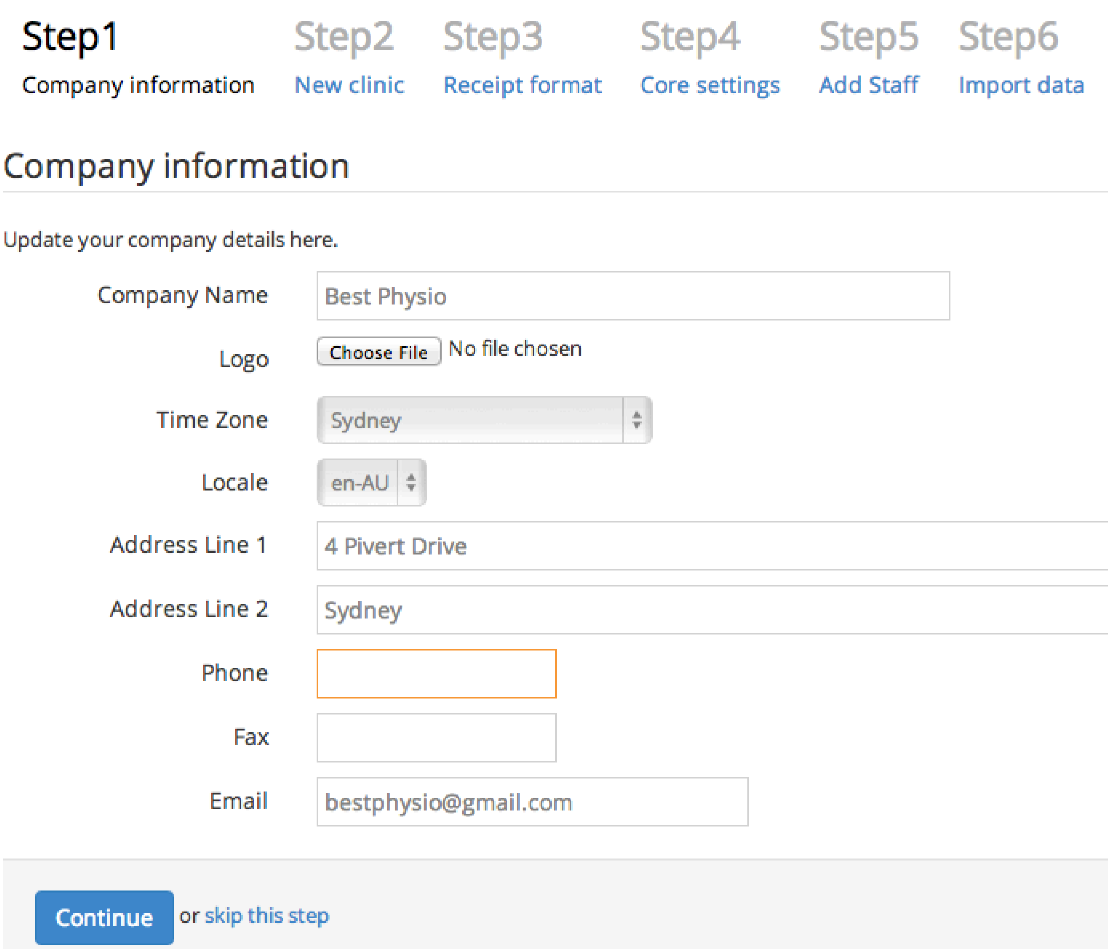
Contents

1 Initial Setup

On first login (after the site is created), the admin user is presented this setup wizard. All the information can be edit later on, so don't worry if got it wrong first time.

1.1 Update Business Information

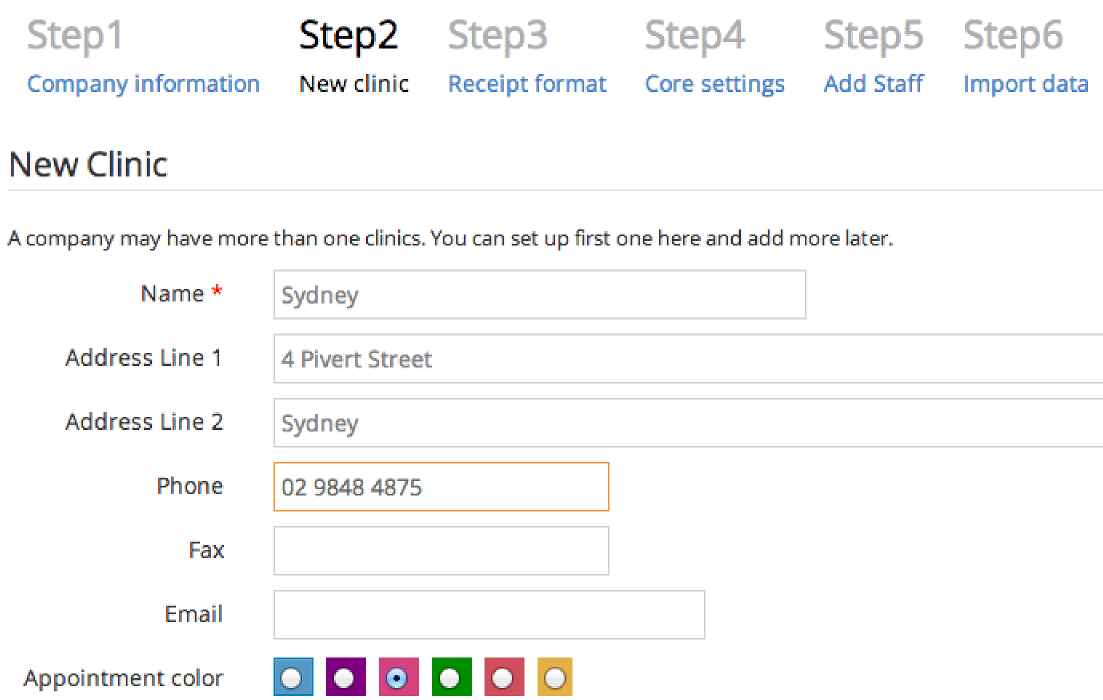
First step, update business information such as name, logo, and address.



At all wizard steps (except for the last one), you may skip it.

1.2 Add First Clinic

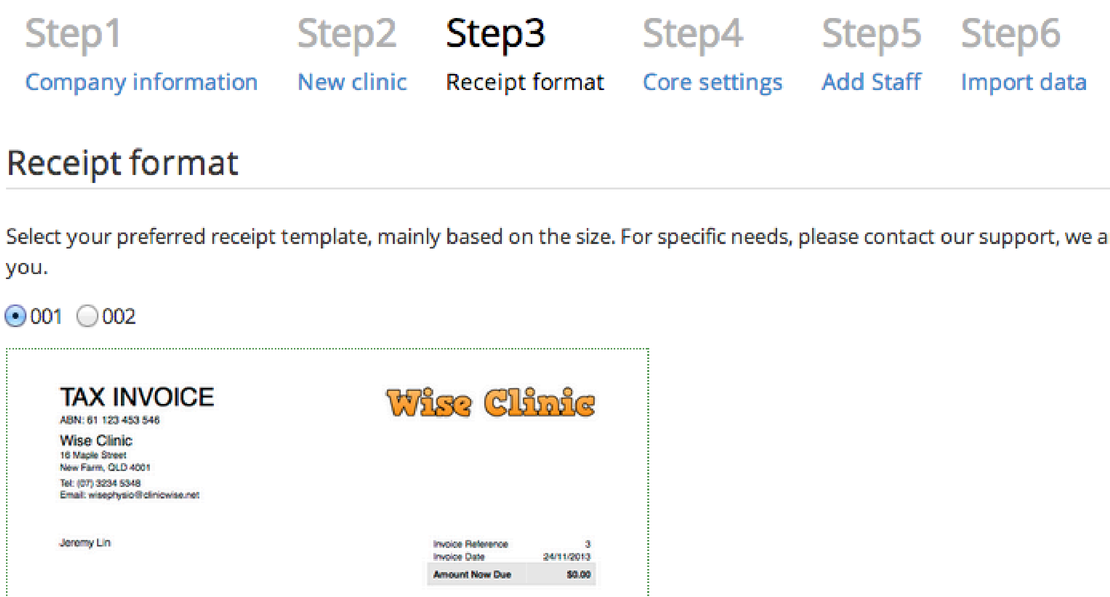
A Practice may have one or more clinics (some call locations). In this second step is to add the first clinic. (You add more later).



The appointment color is the appointment color for this clinic shown on diary.

1.3 Choose Receipt Format for Printing

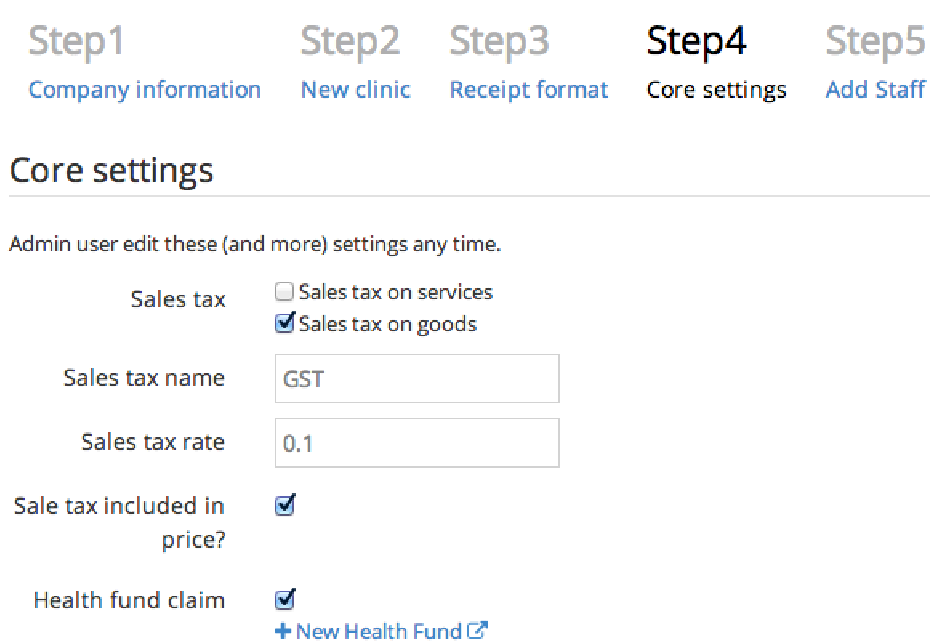
By default, the receipt is set to print on A4 paper. The system comes with a couple of receipt templates for choose.



If you have special needs (paper size or format), contact support we will consider creating customised template for you.

1.4 Core Settings

The step list several core settings, mostly on pricing and taxes.



You are highly recommended to review all settings after initial setup. The default values have been selected based on the nature of your business.

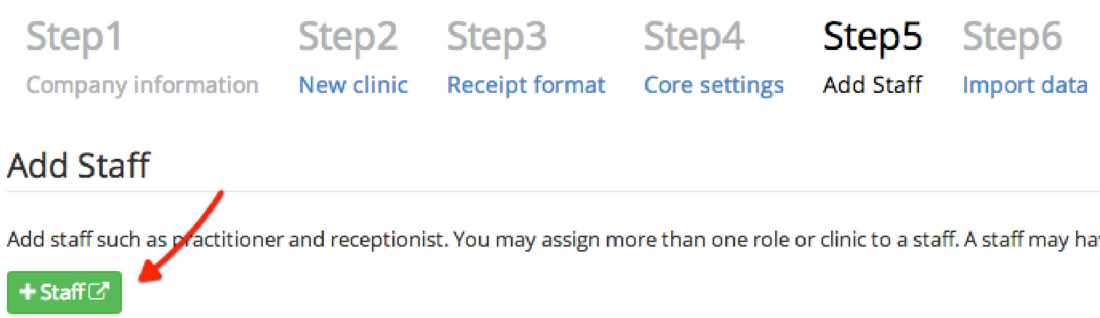
1.5 Add Staff

Except from Admin (the only super user), a clinic staff may have one or more the following roles:

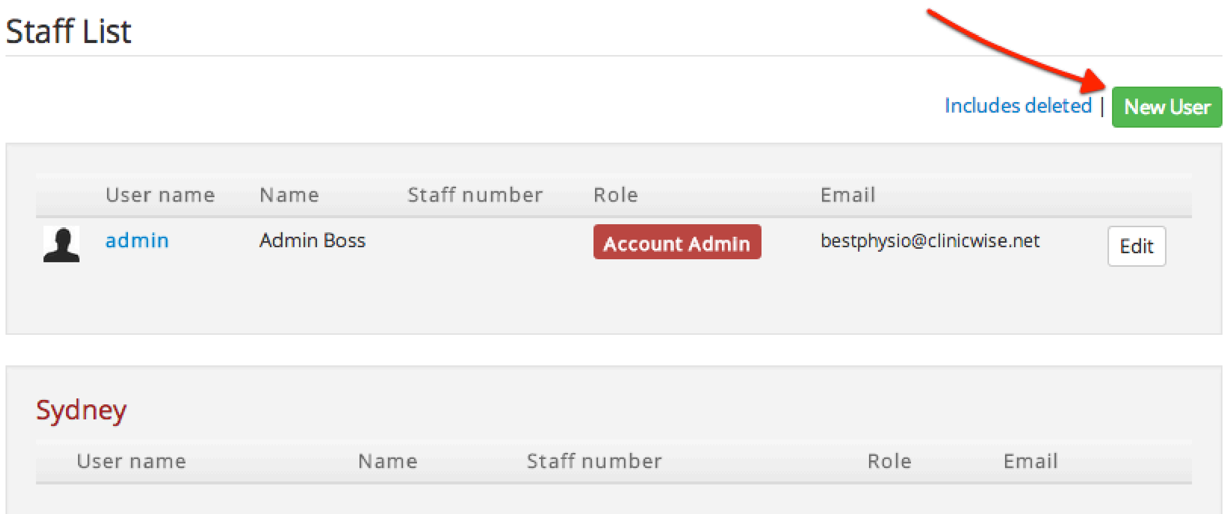
- Clinic Admin. The manager of a clinic. Can assign staff roles and view reports, all within assigned clinic.
- Practitioner. Provide treatment/consultation services. Can view his/her own report.
- Receptionist. Appointment management, Invoicing and Take payment.
- Assistant. The assistant manager of a clinic, can perform certain admin tasks such as shift management, but not allowed to view reports.
- Nurse. Very limited access, can view diary.

If a staff has two roles, he/she may perform any operations permitted by these two roles. Admin may change the assignment of roles to a staff any time, and take effect immediately.

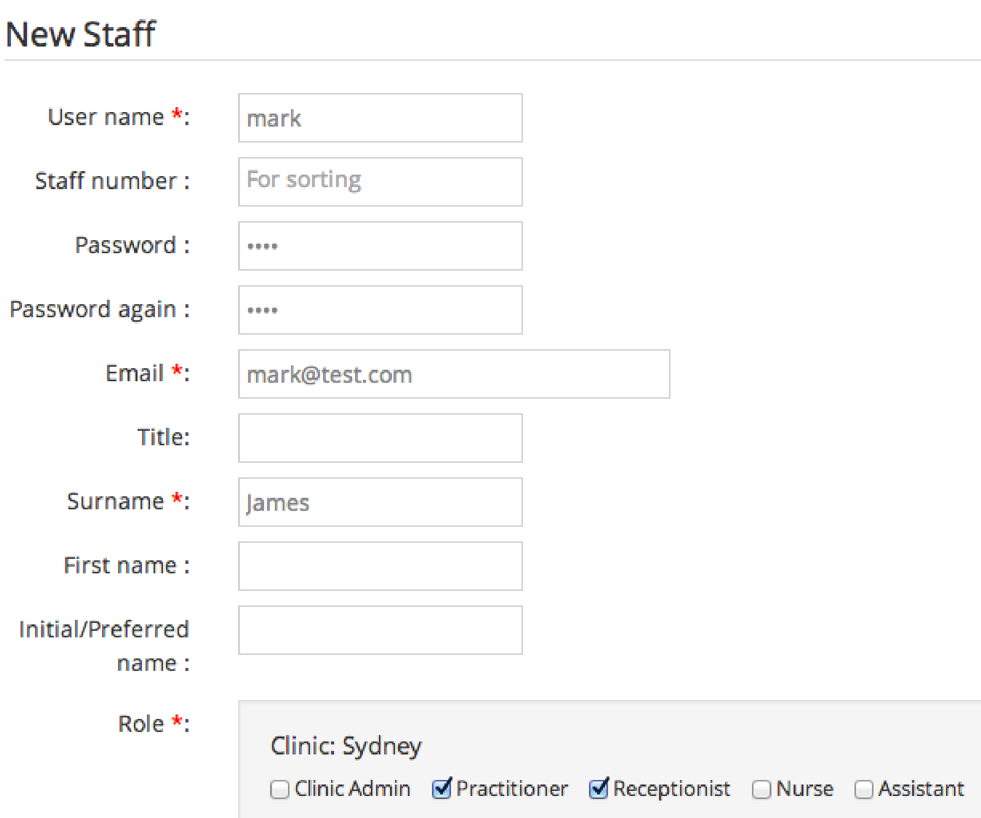
Click '+ Staff', it will open a staff management page on a new browser window or tab. (So you can easily continue the wizard after finishing adding staff).



Click 'New Staff"



Enter staff user name, password, email (for retrieving password) and roles to create a new user. The number of practitioners is limited to your subscription.

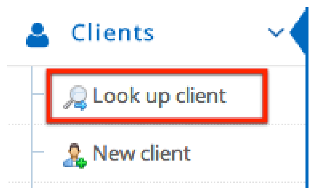


After a new user is created, he/she can log in the system right away.

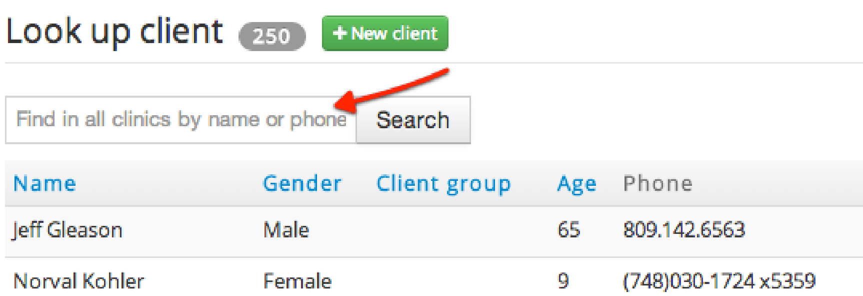
2 Clients

2.1 Find a client (or patient)

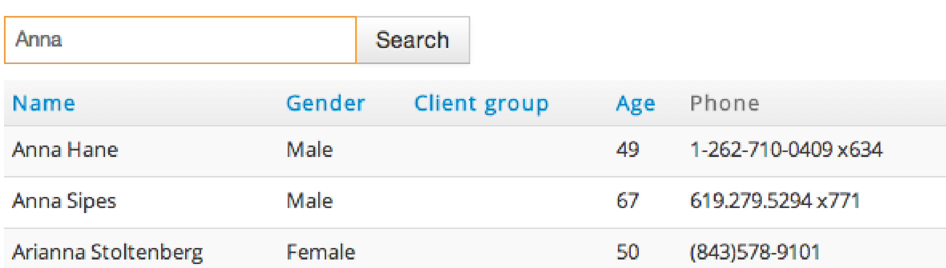
Click the ‘look up client’ menu on the left.



You can see the list of clients (with pagination and total count). Quite often, you want to search for a client based on name. (ClinicWise supports searching based on name or phone number)



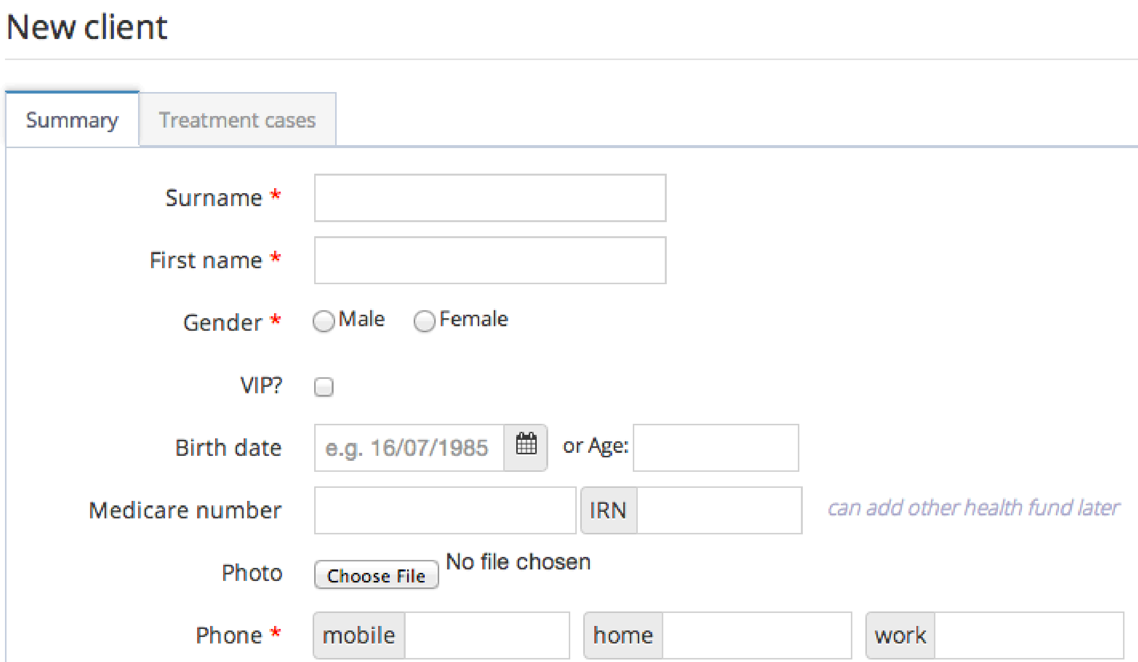
For maximum efficiency, ClinicWise start search while you start typing.



2.2 Create new client

There are several ways to navigate to creating new client page: from the menu, button on the client list page and the shortcut (see below)

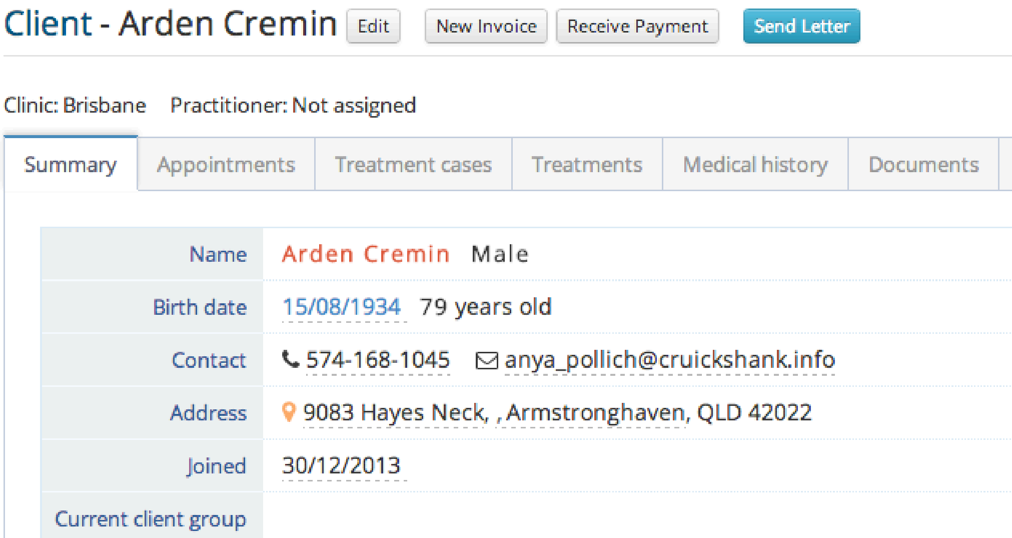
The mandatory fields are marked with red ‘*’. The birth date field (the age is calculated automatically) can be configured to be mandatory (Admin task). Only one phone number is required. It is recommended to enter National Medicare number on creating a new client, it can be added later though.



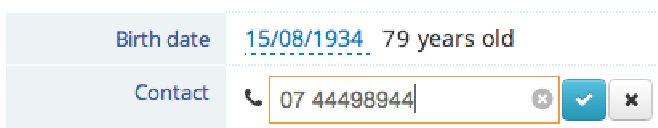
Also you can optionally create the first treatment case for the new client.

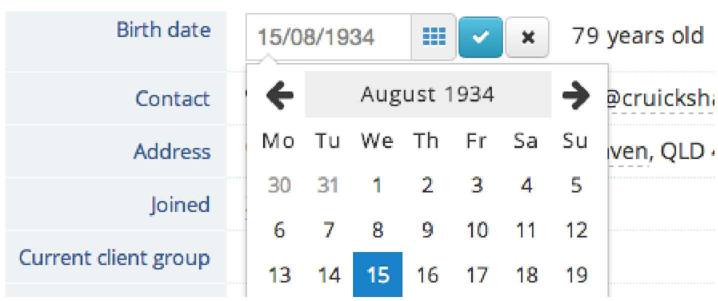
2.3 Edit a client

You can inline edit (just change single field quickly) many client fields.

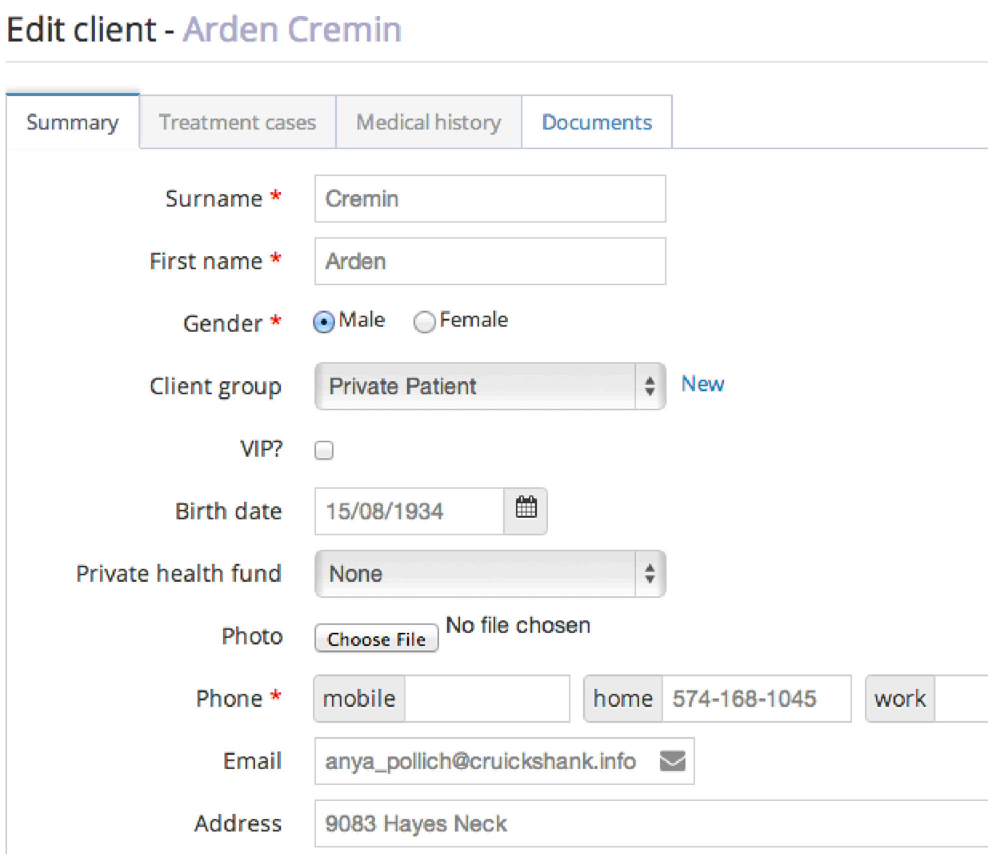


Simply click the link in dash-lines, the below are two examples: change phone and birth date.



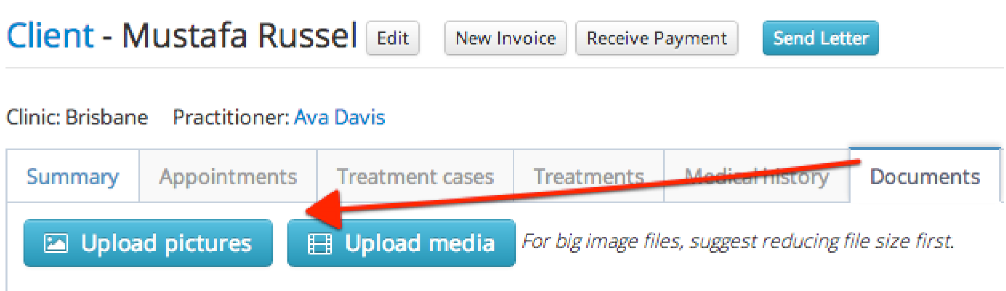


For more edit options (such as uploading an avatar or photo), click the 'Edit' button.



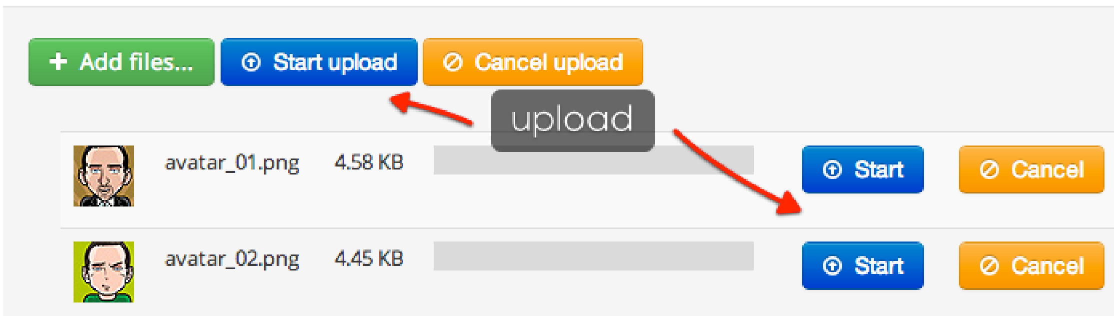
2.4 Upload pictures or media documents

You may upload photos or other documents to a client records. Click the 'Document' tab.

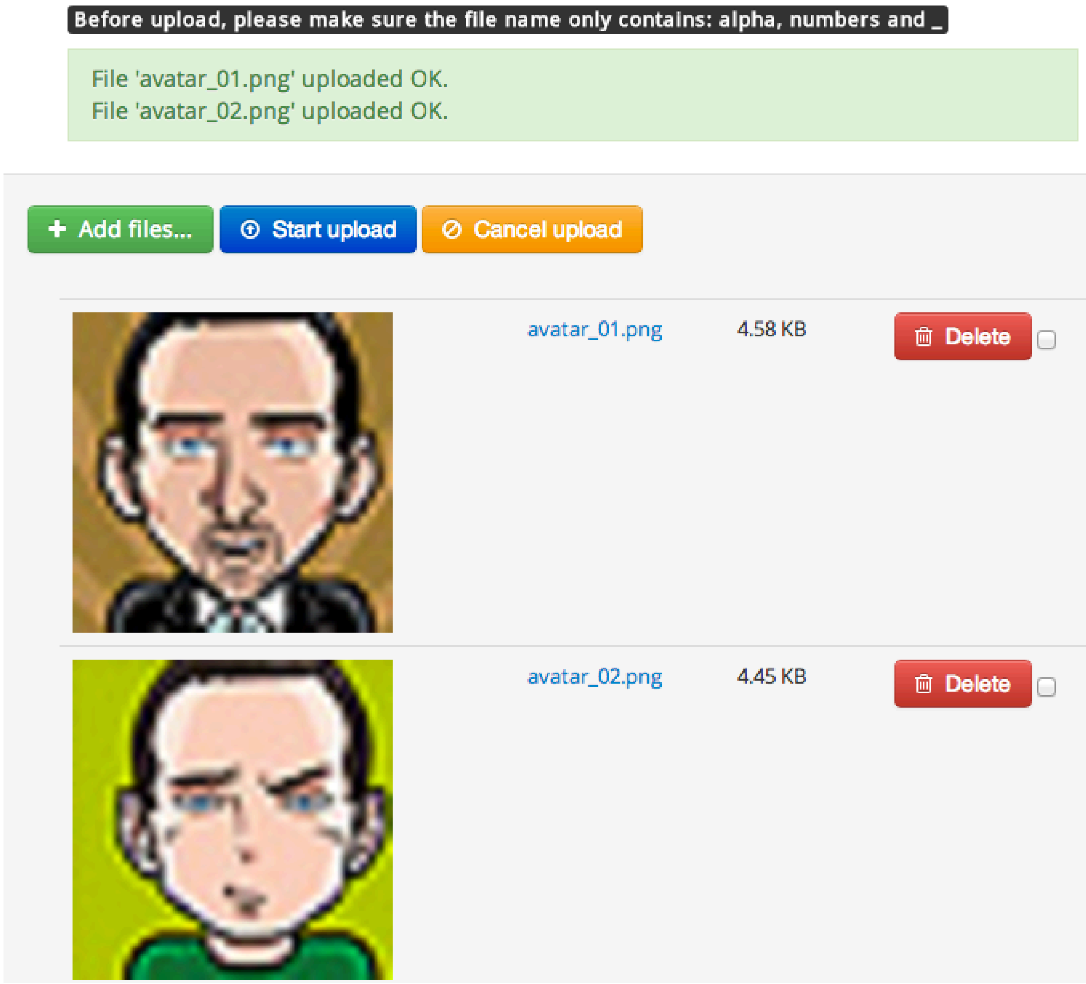


Uploading can be done two ways: simply drag one or more files to the page or click 'Add filesâ€¦' button to select files.

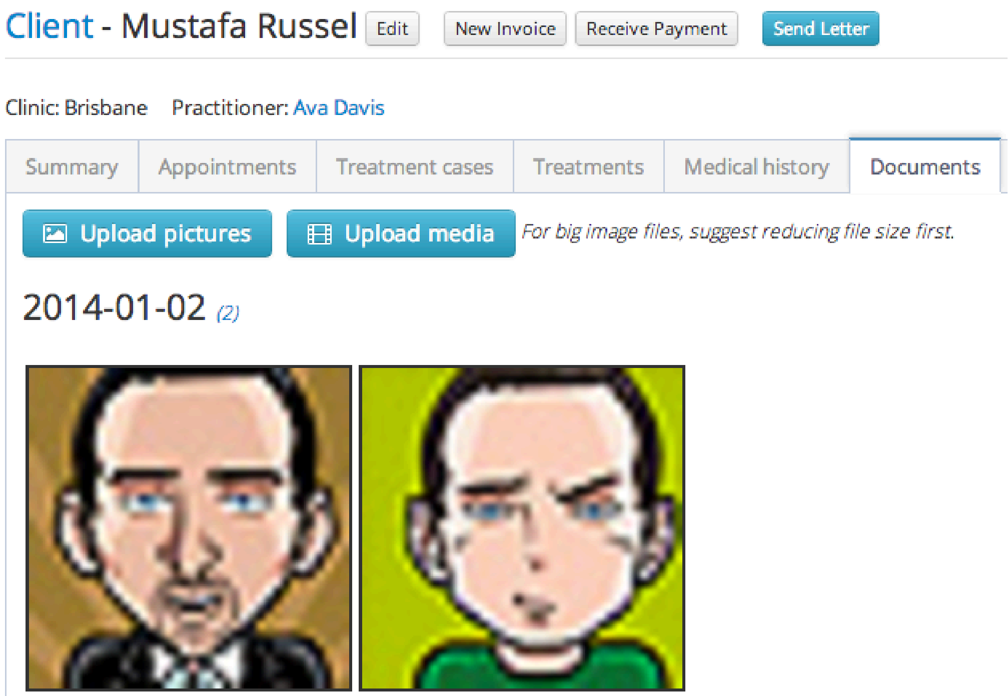
After files are selected, basic file information such as file type and size are displayed. For image files, a thumbnail is also shown.



Click the 'Start' to initiate the upload.



You can delete or upload new documents as you wish. When it is all done, click the client (name) to view them.



For images, click the image thumbnail will show full image in a pop up.

2.5 Change Private Health Fund

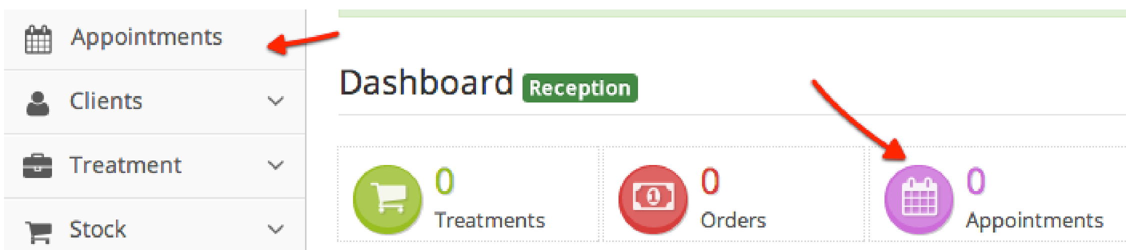
Clients with private health funds can do on-the-spot claims (if the module is turned on by Admin). The list of private health funds shall have been set up by the Admin. To assign or change a client's private health fund, go to the client's summary page, just select a new one.

After changed successfully, an indication is shown.

3 Appointments

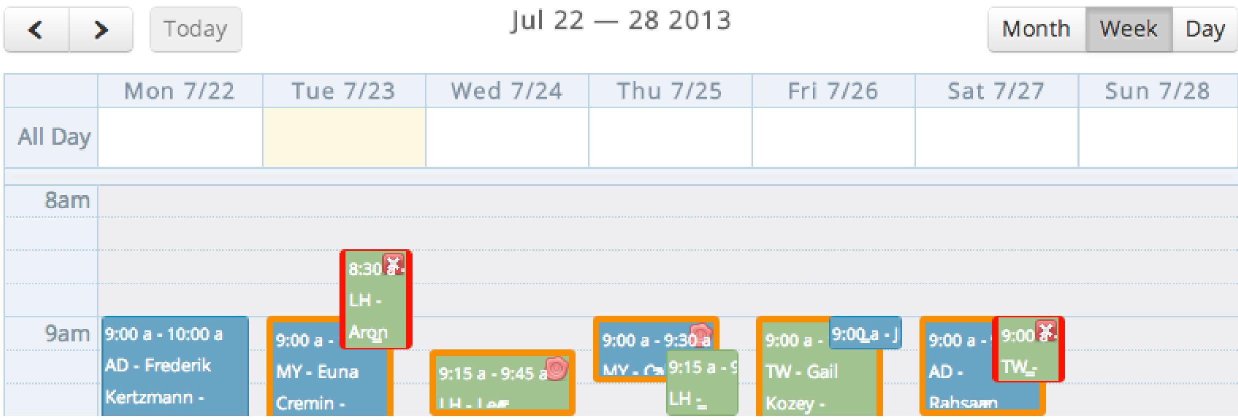
3.1 Open Calendar

There are two ways to access to Diary (Calendar): from the side navigation menu on the left or Dashboard page



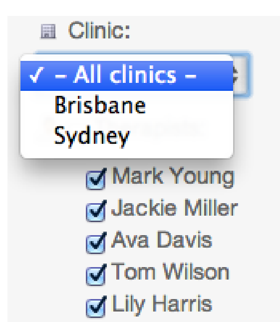
Day view

Week view



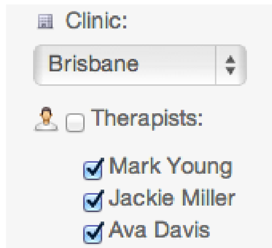
Month view

Show appointments in all clinics



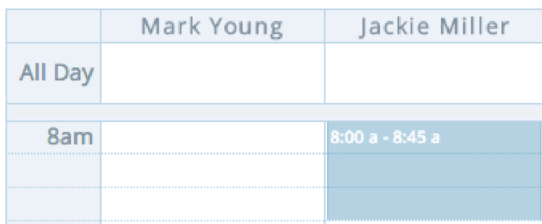
Show appointments in single clinic

After selection, only practitioners in that clinic will be shown on calendar.

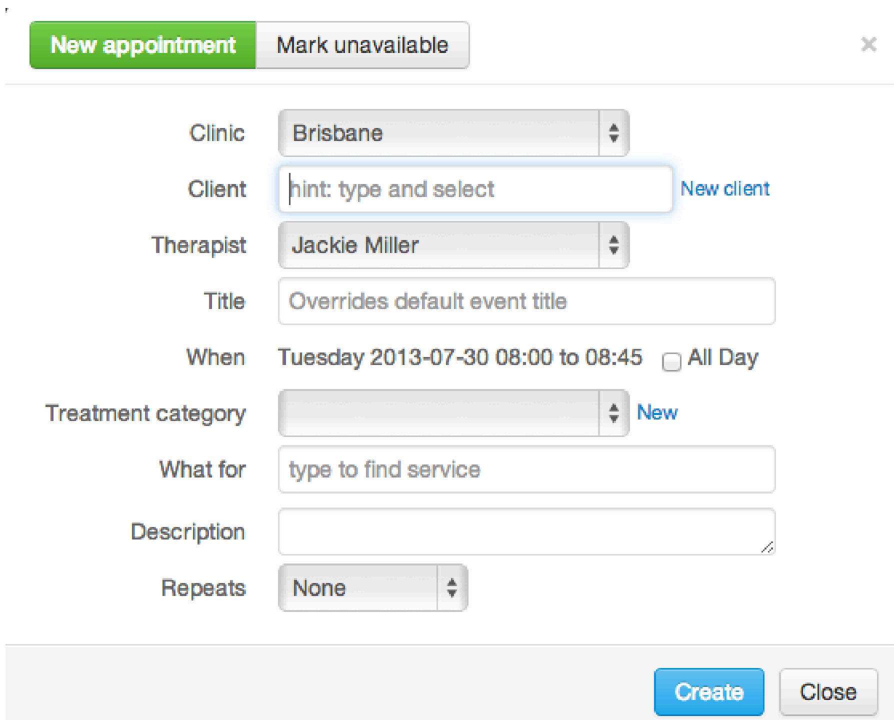


3.2 Create New Appointment

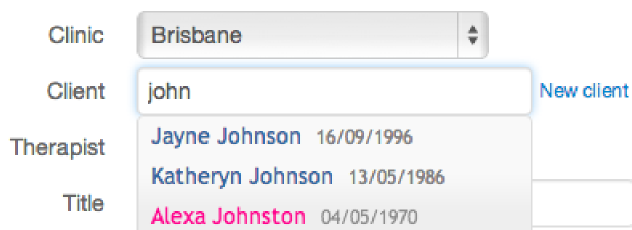
Typically reception (or practitioner) create a new appointment from ‘Day View’ (can be week view as well). Use mouse to select and drag to desired time slot (under a practitioner if in ‘Day view’)



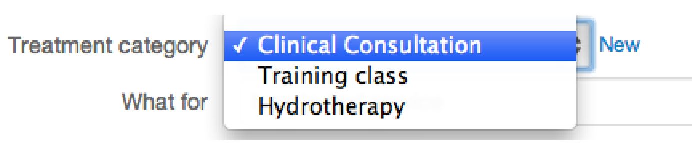
A pop up window will show.



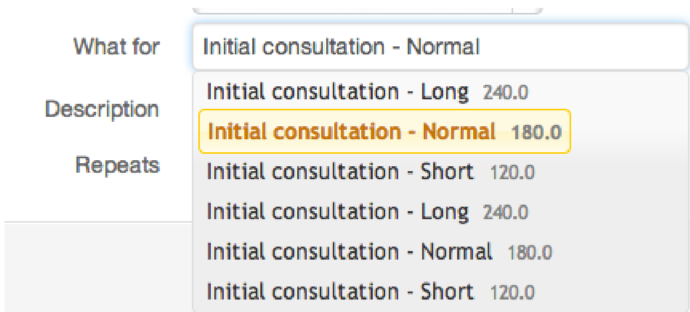
Type and select matching client. The patient name are colour coded and followed by birth day if supplied.



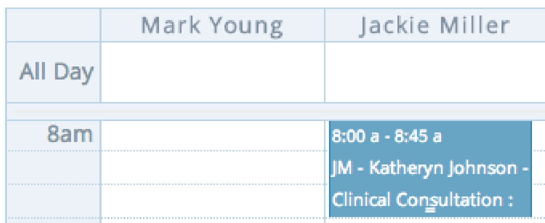
Select the treatment category, while this is optional, but will be good for reporting. If you have set the default treatment category, this option will be pre-selected.



Type and select the service, what this appointment for.

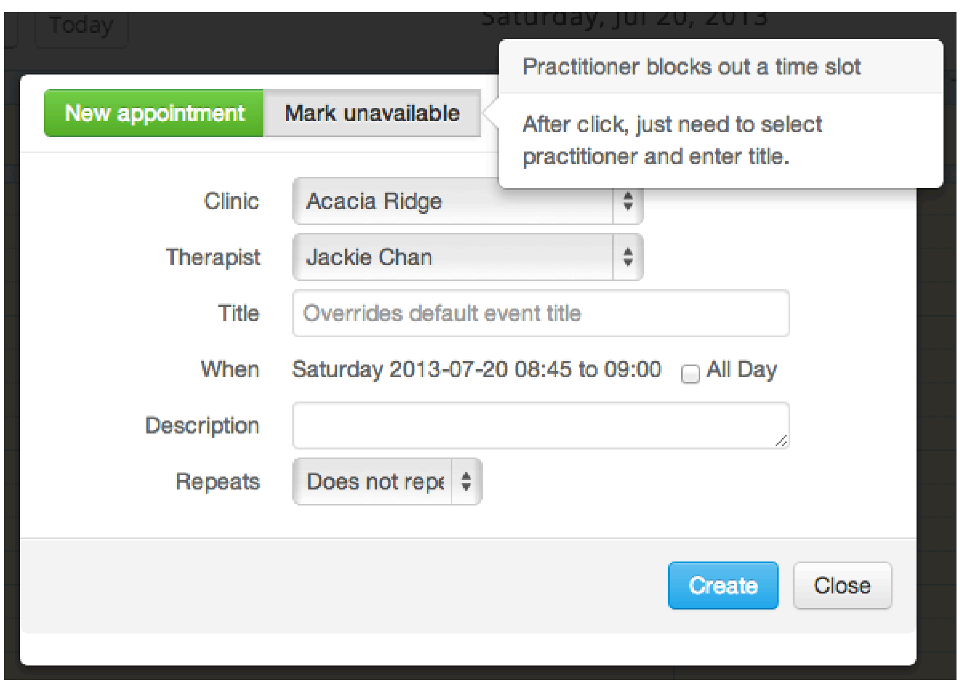


Click ‘Create’ button, and a new appointment is shown on the calendar.

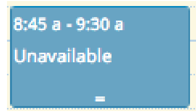


3.3 Block time slot

Often, Practitioner wants to block certain time out. After selecting a time slot (like creating a new appointment), click the ‘Mark unavailable’ button, enter optional title (such as ‘long lunch with friend’), click ‘Create’ button.



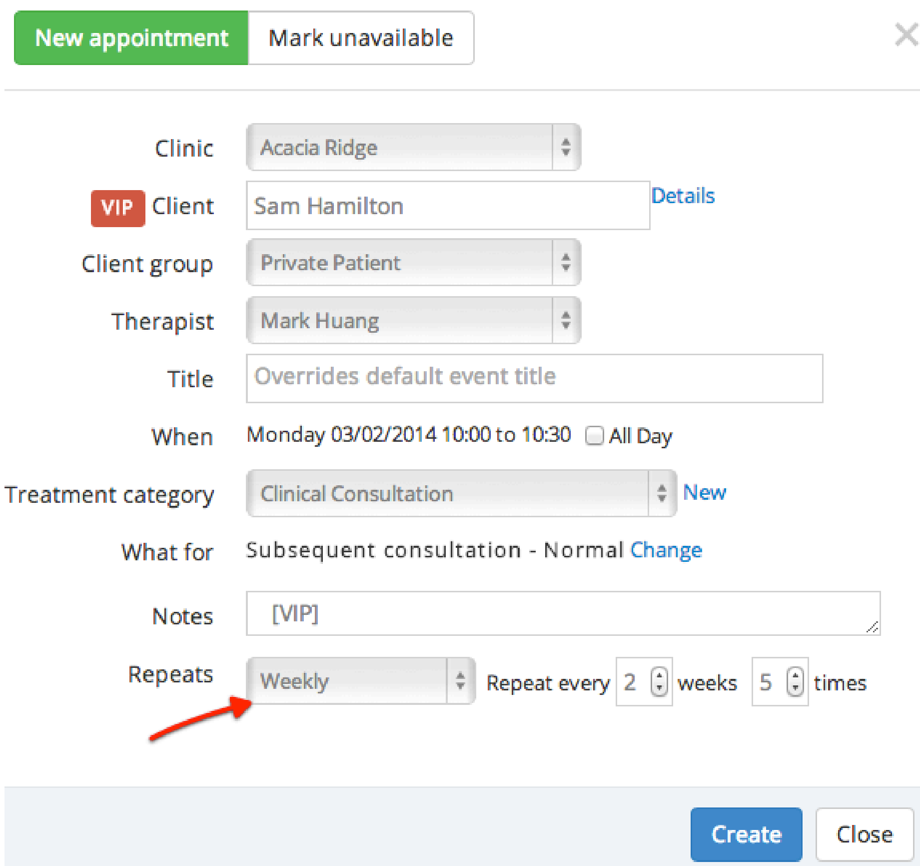
The blocked out time slot is shown as same as normal appointment (this may be changed in future versions).



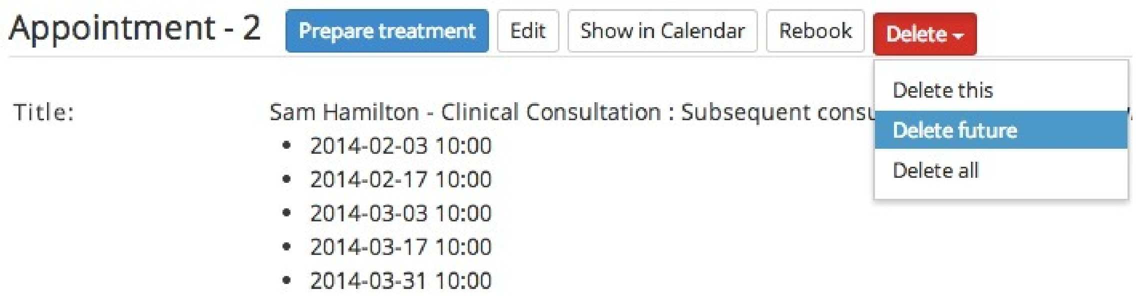
3.4 Create recurring appointments

For recurring appointments, select 'Daily', 'Weekly', 'Monthly', or 'Monthly' in interval drop-down.

Then choose how often in terms of the number of intervals and for how many times.



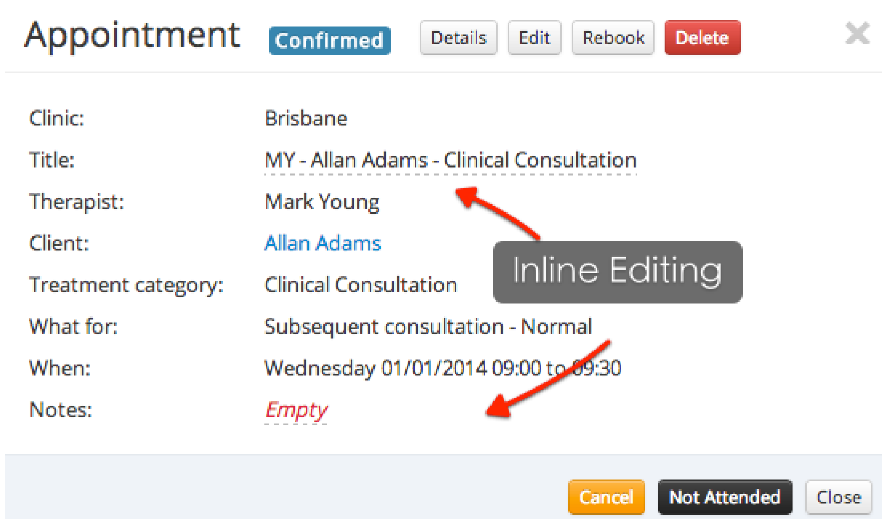
For example, the above will create 5 appointments every 2 weeks.



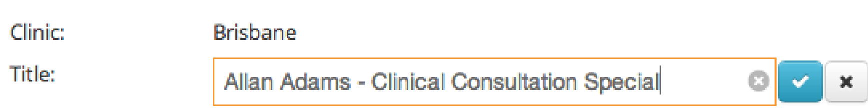
On opening a recurring appointment, receptionists have the option to delete the current one, future ones or all of this kind appointment.

3.5 Edit appointment

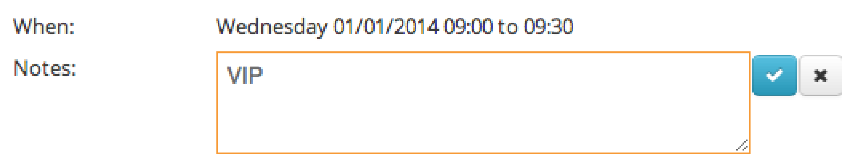
ClinicWise supports quick inline editing (just changing one single field) for appointment title and notes.



To start, just click the link in dash lines.



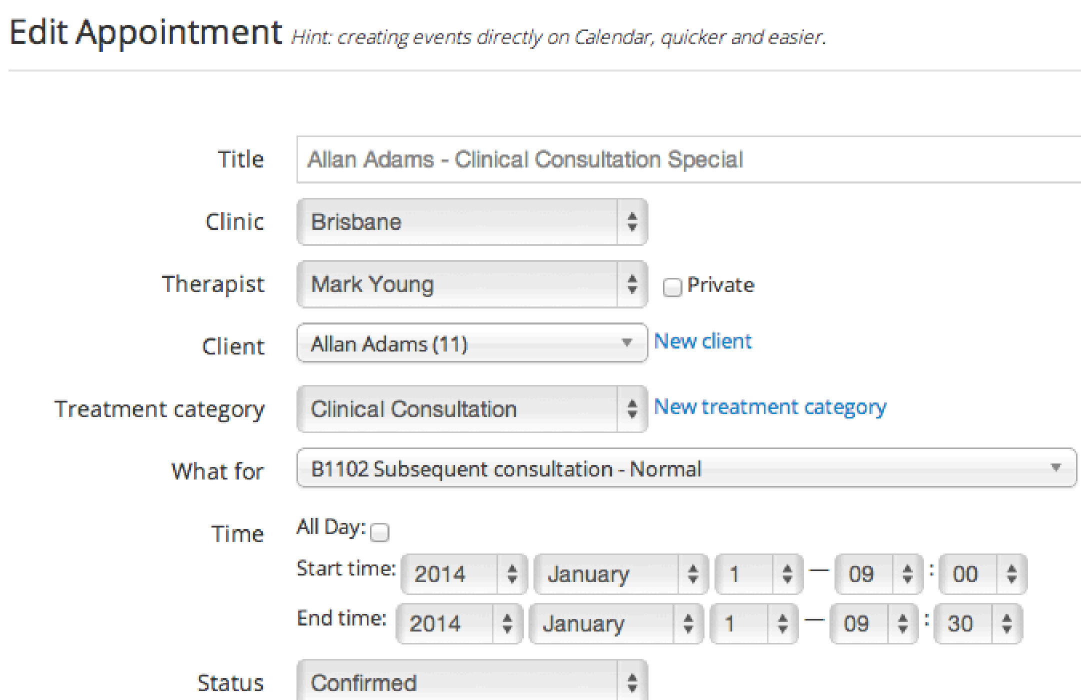
or



Press enter key or click the blue tick button to apply the change, quick and easy.

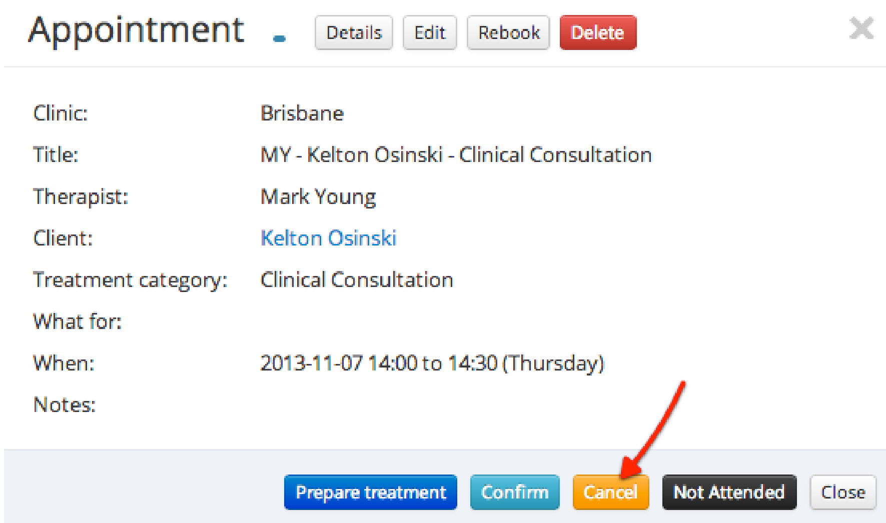
You may drag and drop the appointment conveniently on calendar to change the event time or practitioner.

For more change options, click the 'Edit' button.

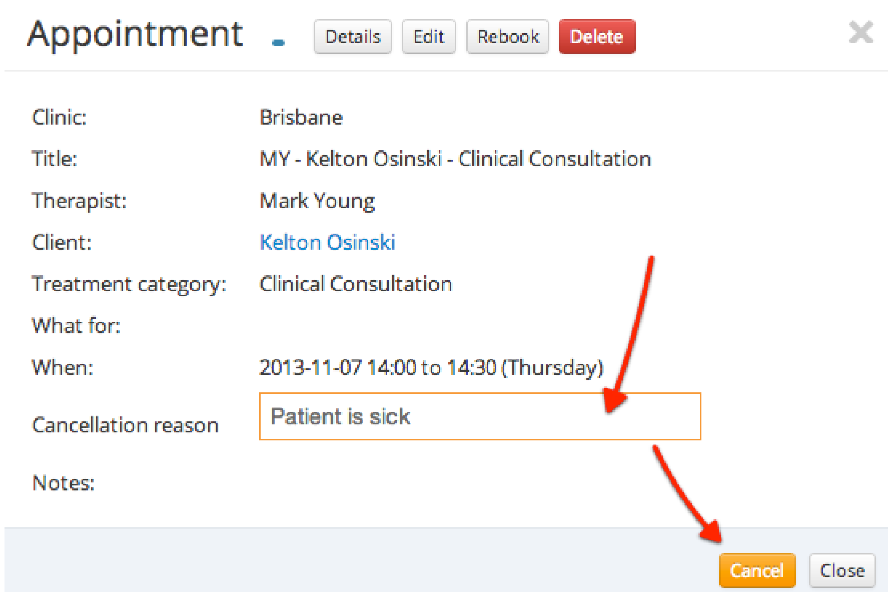


Cancel appointment

Click an appointment on calendar, a popup will show with appointment details.



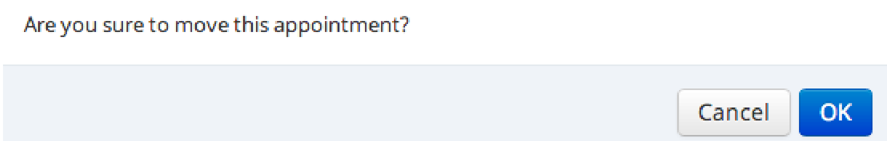
Click the 'Cancel' button, enter the reason, then click 'Cancel' button again.



Recording patient not attending the appointment works the same way.

3.6 Move appointment

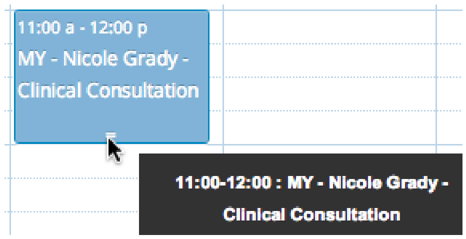
You can simply drag an existing appointment to another time slot, a dialog will pop up for confirmation.



You may drag an appointment to another practitioner column (day view), which will update the time and the practitioner.

3.7 Change appointment duration

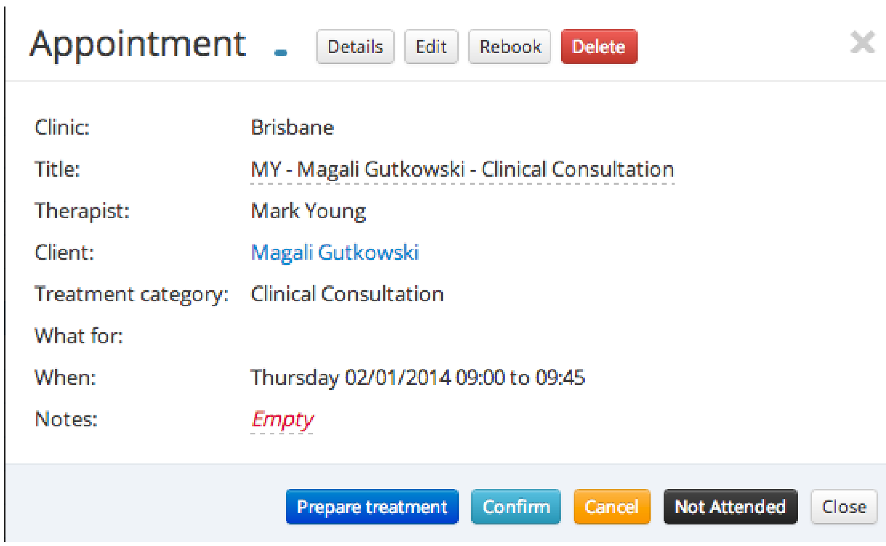
Move the mouse to the bottom edge of an appointment until see a down arrow, drag it to change the duration of the appointment.



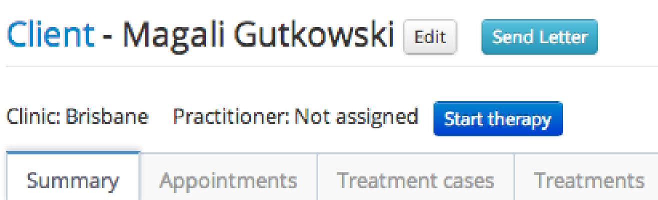
4 Treatments

A practitioner may start treatment from one of the three ways belowï¼š

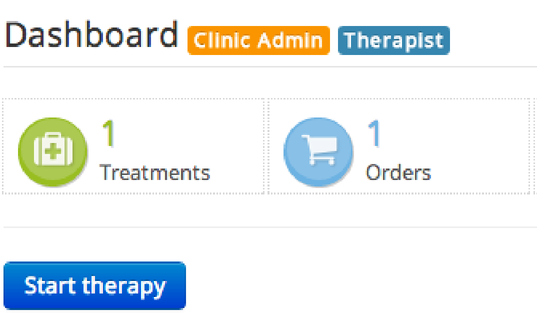
1. Appointment (recommended)



2. Client record



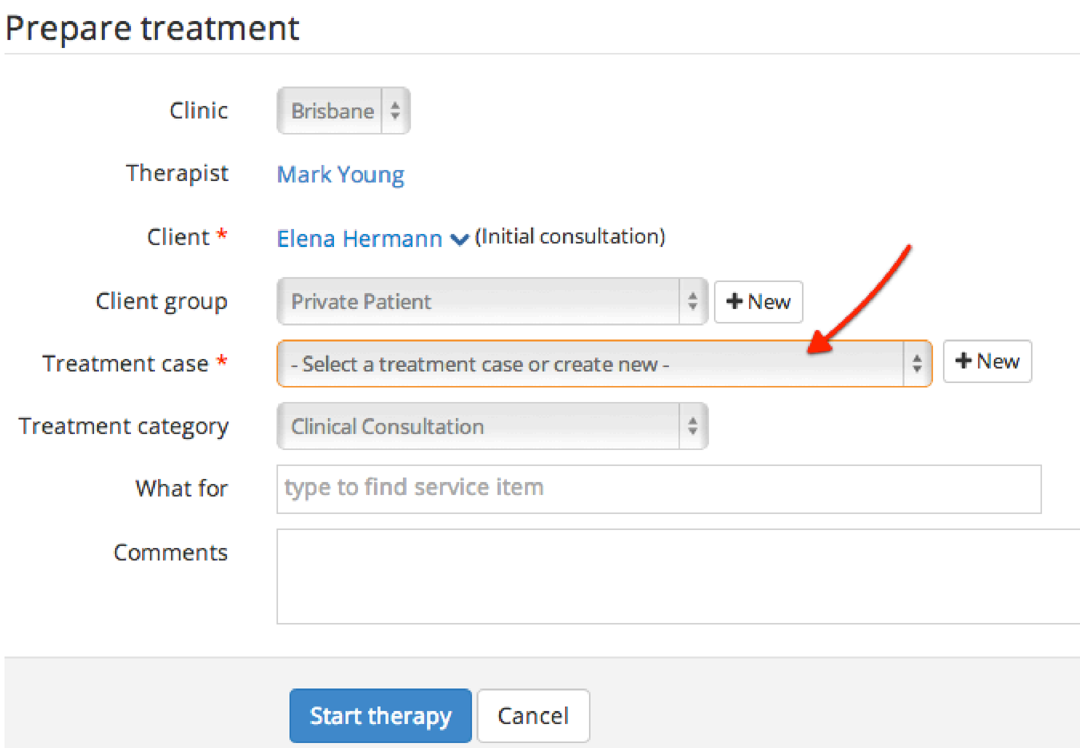
3. Dashboard



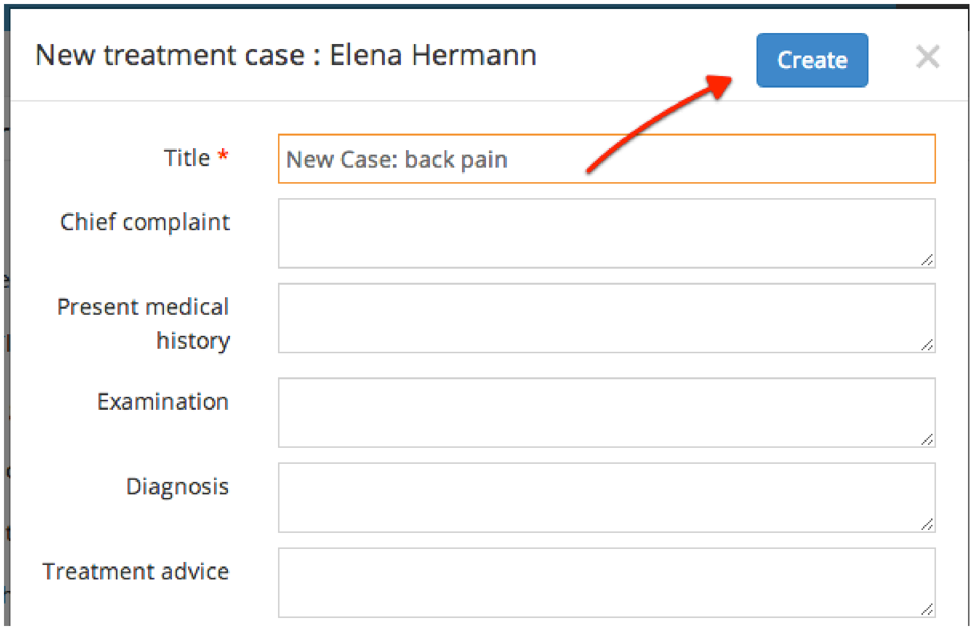
4.1 Prepare Treatment

If comes from a client record page, the client details will be pre-populated. If comes from an appointment, the client and service billing item may be pre-populated.

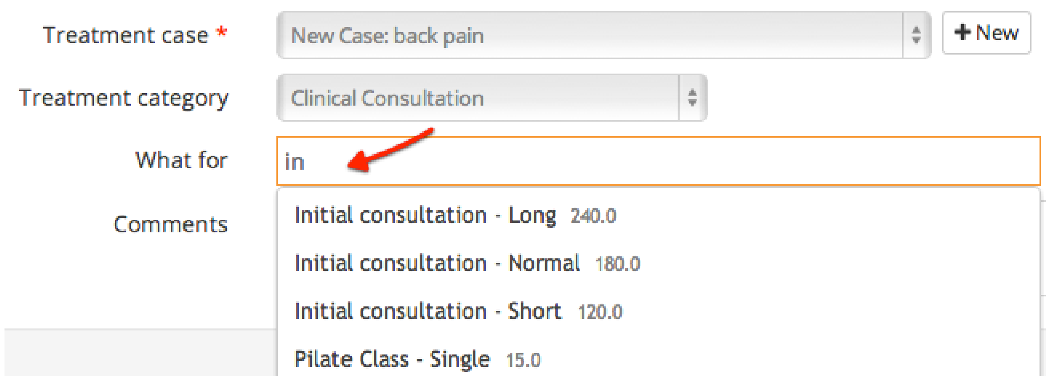
To start a treatment, must select a treatment case. A treatment case groups one or more treatments for one symptom.



You may select an existing case, or creating a new one by clicking the '+New' button. A pop up window is shown for you to enter case name and other attributes.



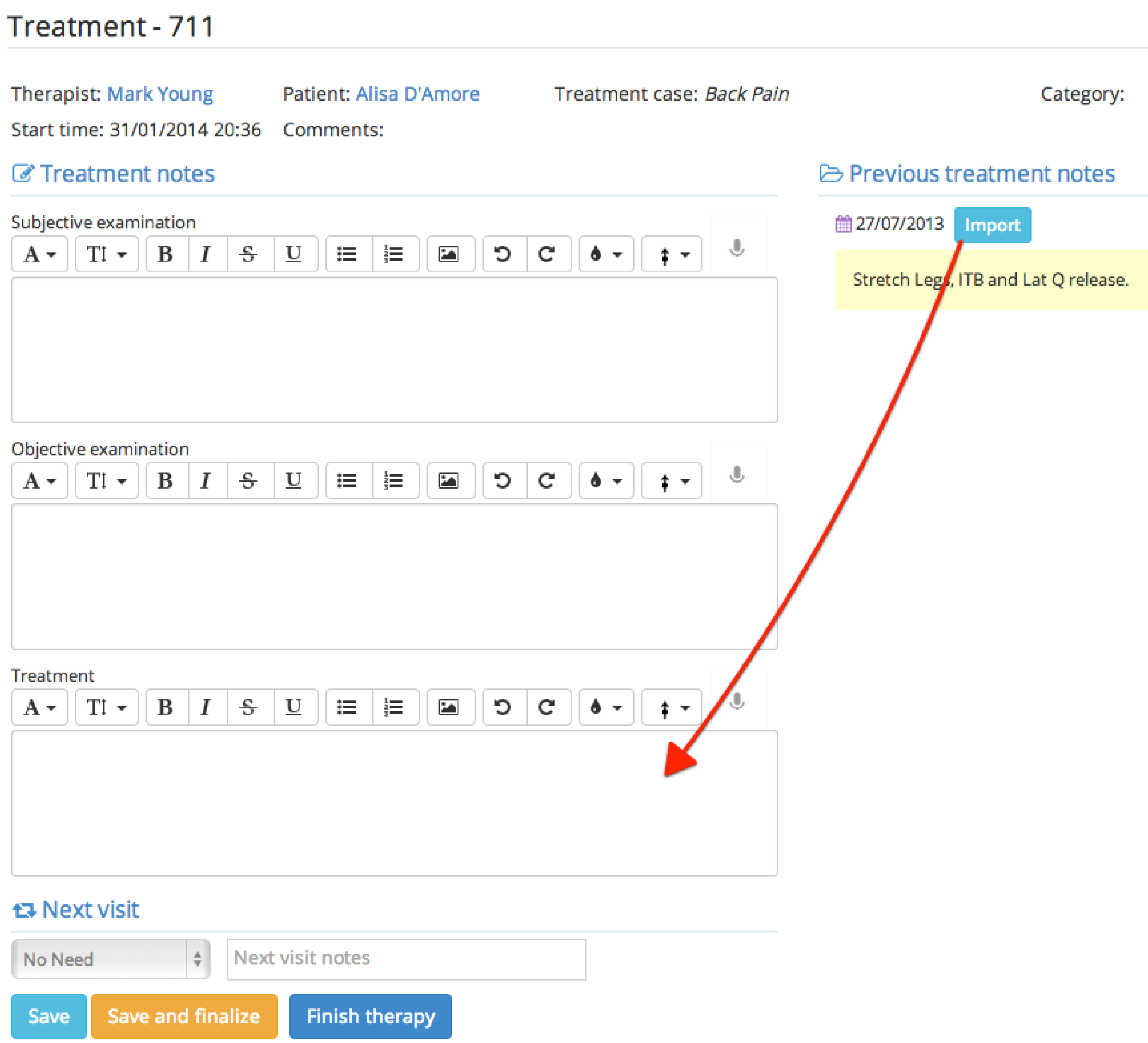
After the case is created, it will be preselected. If the default service billing item is not selected, you can type in and select one.



Click 'Start therapy' to see treatment notes page. Treatment preparation is done before or at the beginning seeing the patient.

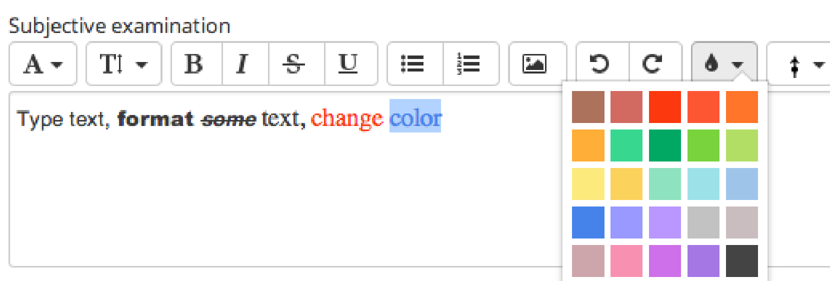
4.2 Treatment Notes

Practitioner can see a history of previous treatment notes, and may import previous treatment notes to the current one.



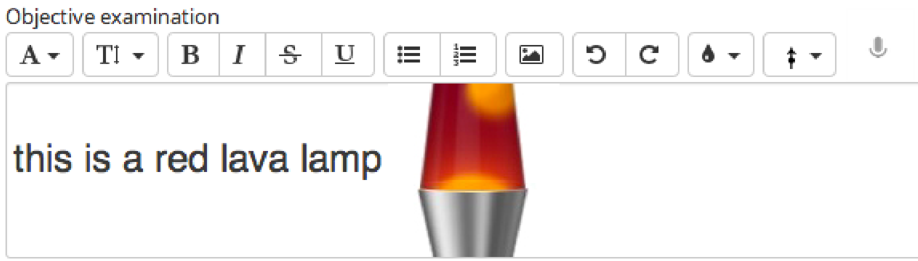
Format text

Beside standard text transformation (bold, font, size), you may also change text colour.



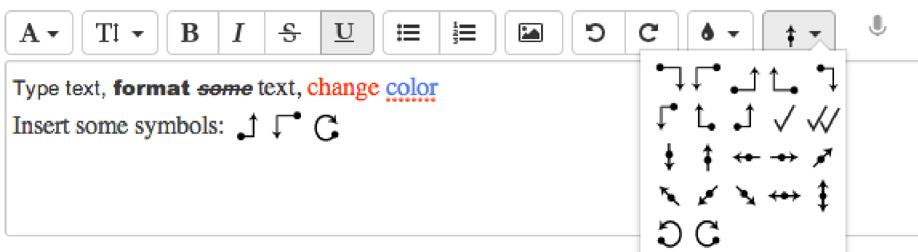
Insert picture

You can also include pictures (simply drag and drop) in the notes, but the image file cannot be big.



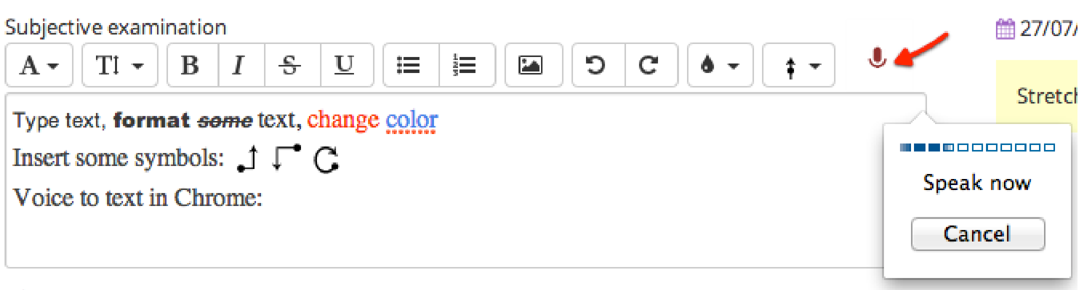
Insert symbols

You may also include some symbols in your treatment notes. Not finding what you need, contact our support, we are happy to create one for you.



Voice to Text (Chrome only)

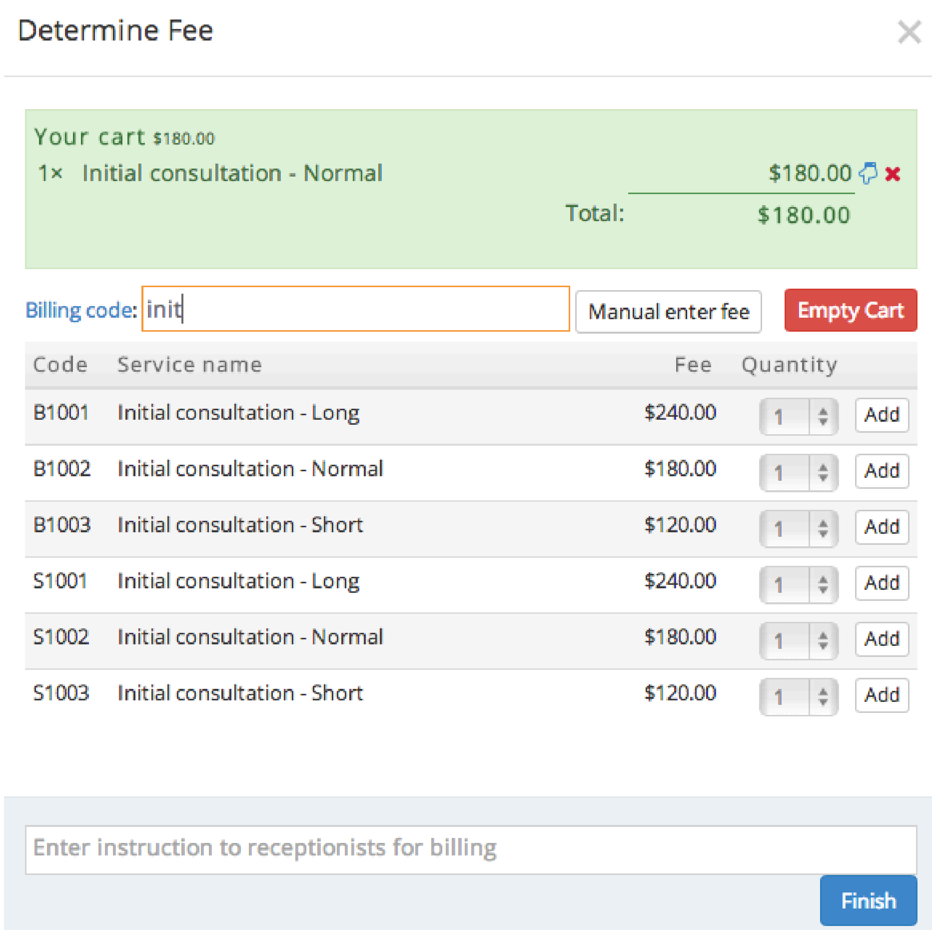
Google Chrome browser has built-in voice to text recognition. To use this, you must have a working microphone with your computer. The accuracy (voice to text), in my opinion, is not that good yet.



4.3 Select Fee or Instruction to Pay

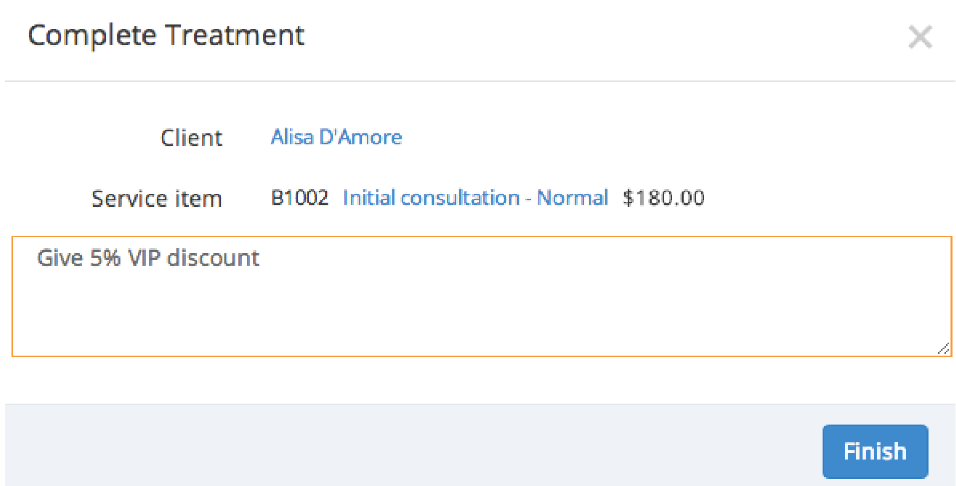
Click 'Finish therapy' button, a popup window will show a popup window for instructions to pay, depending on the nature of your business (see settings under 'pricing'):

- **Select fee**. This option is most common for change-on-the-spot treatments, such as Dentists. In this case, Dentists select billing service items (which determine the total fee) and may also include instructions to pay as well.



or

- **Instruction to receptionist for invoicing**. This option is most common for fixed-fee treatments such as physiotherapists.



Either way, receptionists can create an invoice for it.

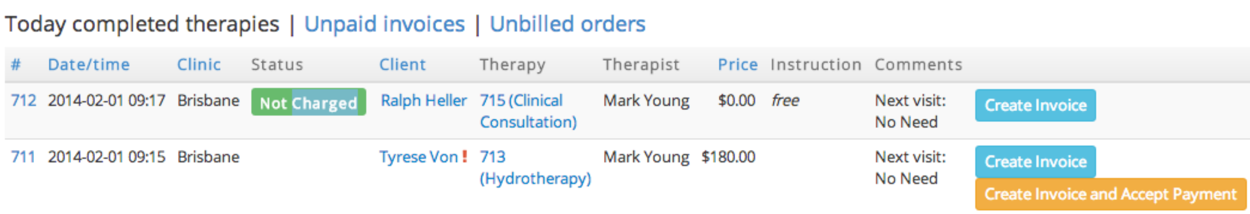
5 Invoicing

An invoice contains services or products and their quantities and prices. Payment is taken against an invoice.

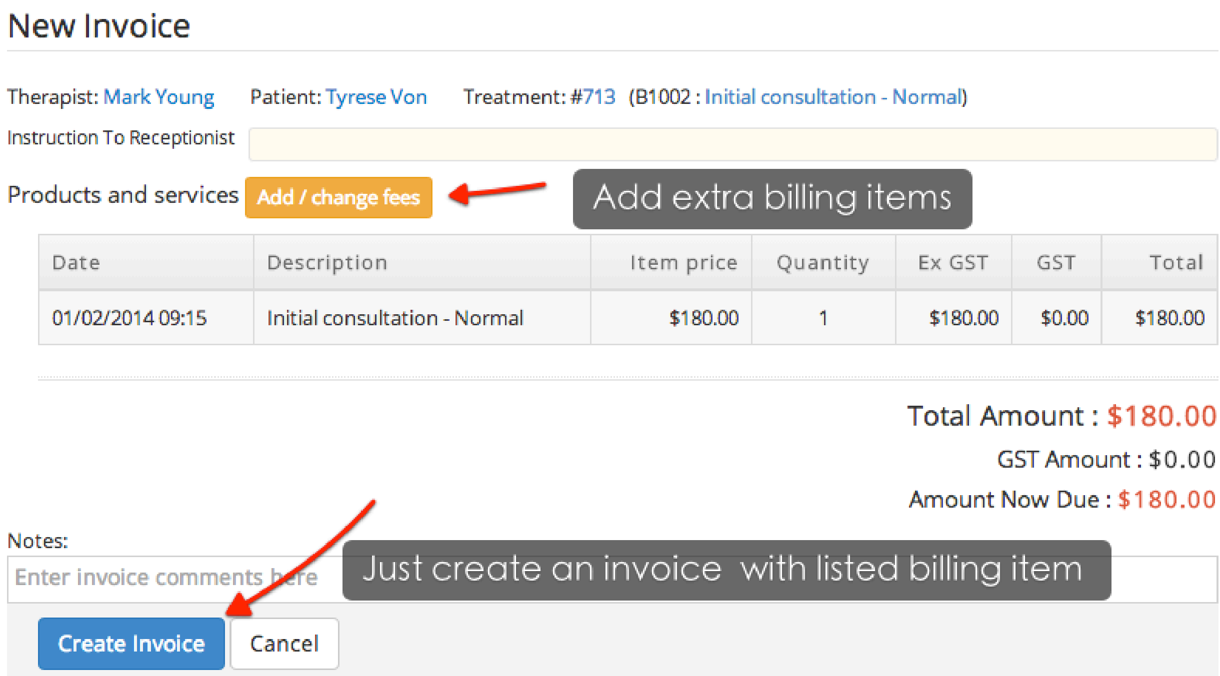
5.1 Create Invoice from a treatment

After a practitioner finishes a treatment, an order will be shown immediately on receptionists' dashboard screen: with two options:

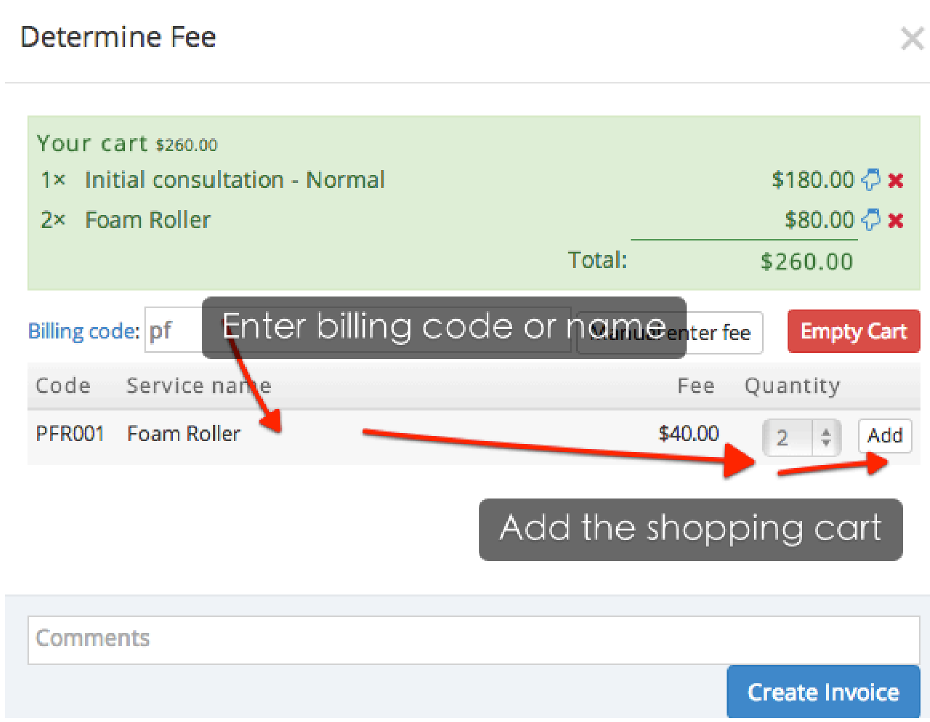
- **Create Invoice**. May need some adjustments to the billing items, such adding extra ones, apply discounts, …, etc.
- **Create Invoice and Accept Payment**. Happy with the order amount, go straight to the payment.



This is a screen after a receptionist clicks 'Create Invoice' button.

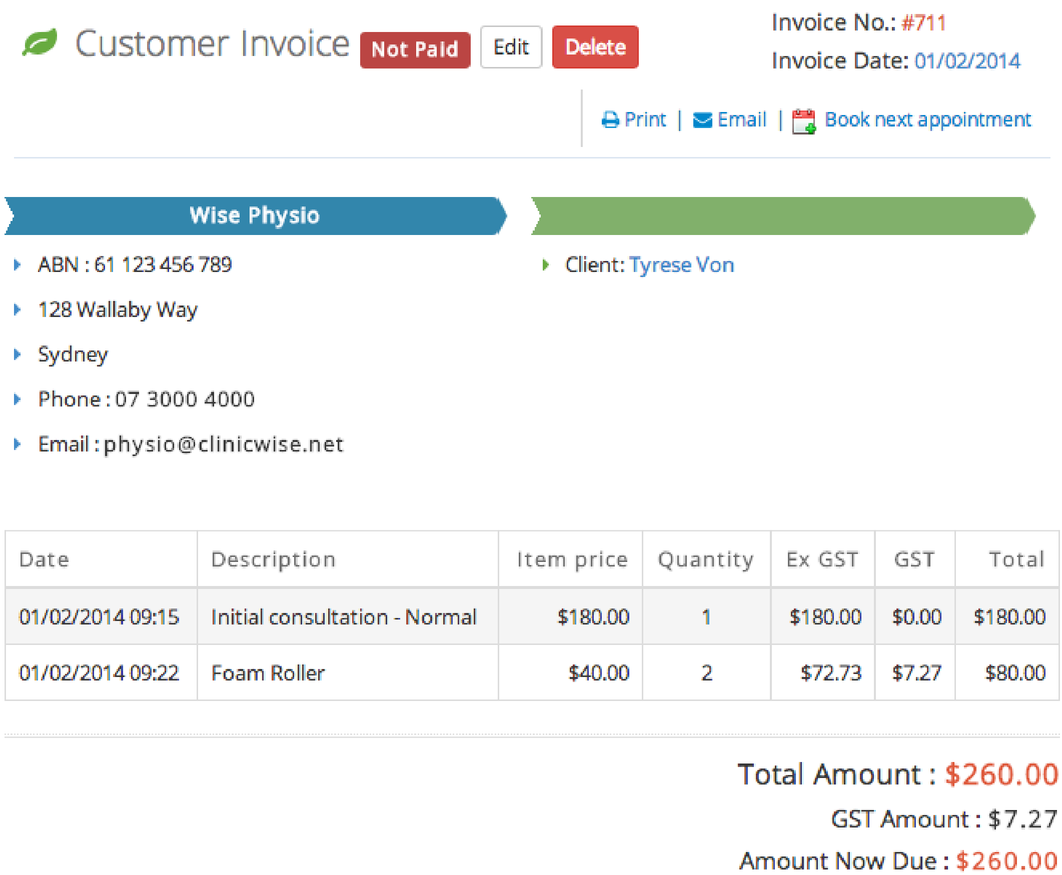


Each billing item and total amount are shown. To make adjustments, click 'Add/change fees' button, which will bring a popup window like below.



You can add extra items, or empty the whole shopping cart, apply discounts (see the section below).

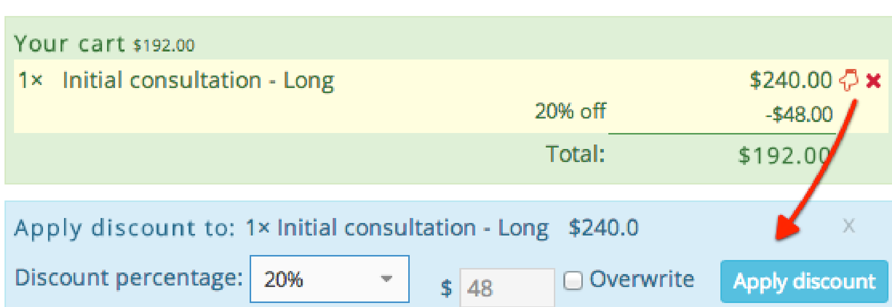
Click 'Create Invoice' button once you are happy with it. An invoice looks like this:



5.2 Apply Discounts

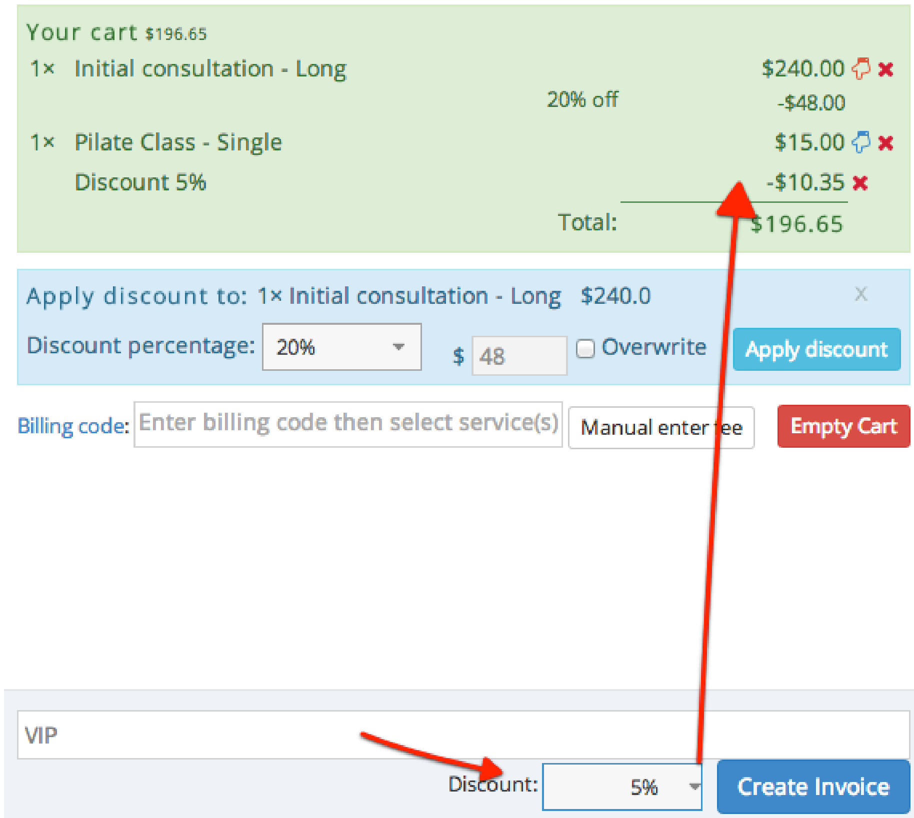
You can apply two types of discounts:

- **Individual billing item discount**

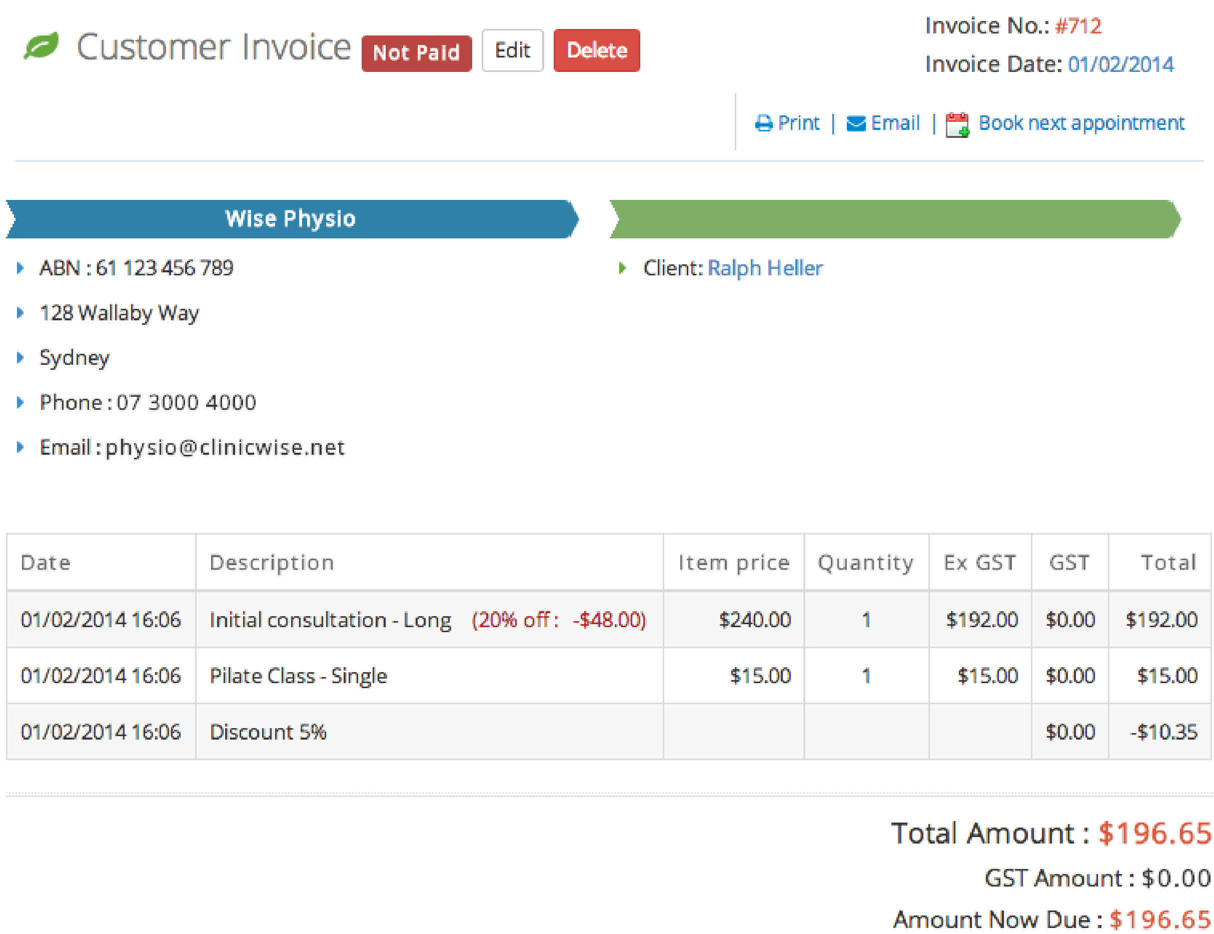


After select individual discount, you can overwrite with a fixed amount by ticking the 'Overwrite' checkbox.

- **Total discount**



Here is a sample invoice (after created) with individual and global discounts.


Customer Invoice Not Paid Edit Delete

Invoice No.: #712

Invoice Date: 01/02/2014

Print | Email | Book next appointment

Wise Physio

- ABN : 61 123 456 789
- 128 Wallaby Way
- Sydney
- Phone : 07 3000 4000
- Email : physio@clinicwise.net

- Client: Ralph Heller

Date	Description	Item price	Quantity	Ex GST	GST	Total
01/02/2014 16:06	Initial consultation - Long (20% off : -$48.00)	$240.00	1	$192.00	$0.00	$192.00
01/02/2014 16:06	Pilate Class - Single	$15.00	1	$15.00	$0.00	$15.00
01/02/2014 16:06	Discount 5%				$0.00	-$10.35

Total Amount : $196.65

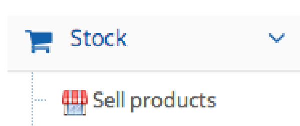
GST Amount : $0.00

Amount Now Due : $196.65

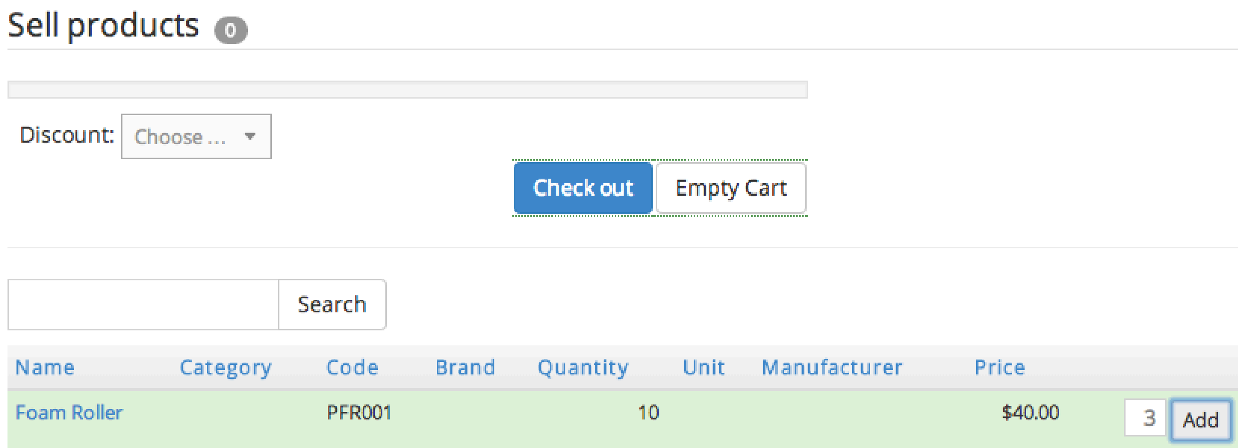
You can click ‘Edit’ to change the billing items as long as no payments recorded against it yet. The edit process is the same as the creation.

5.3 Create Invoice for selling products

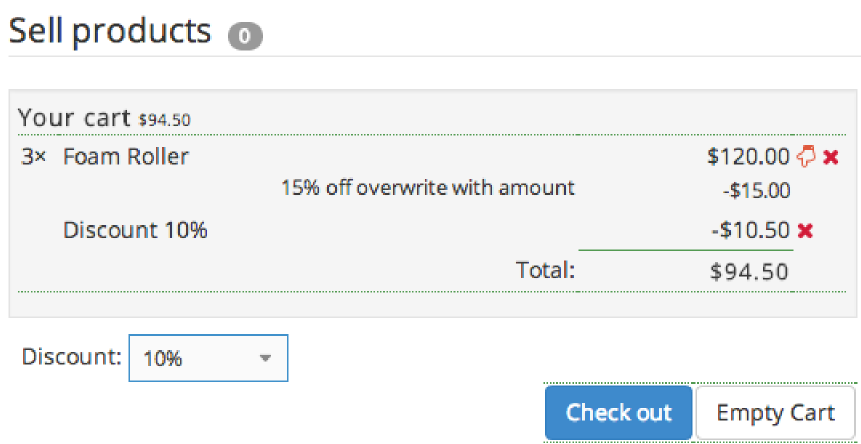
Receptionists can also create invoices (for taking payments) for selling products only. To start, click the ‘Sell products’ menu on the left.



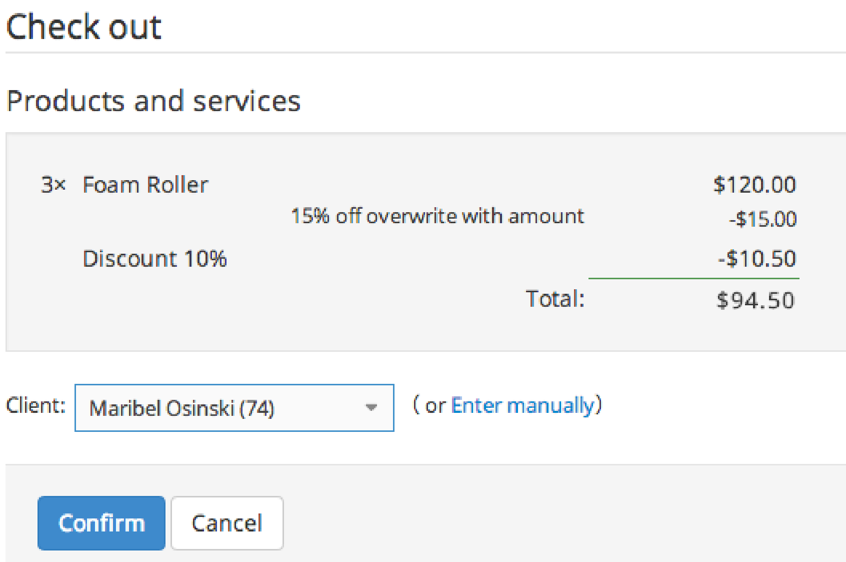
Find the product (searchable by code and name), choose the quantity and click ‘Add’



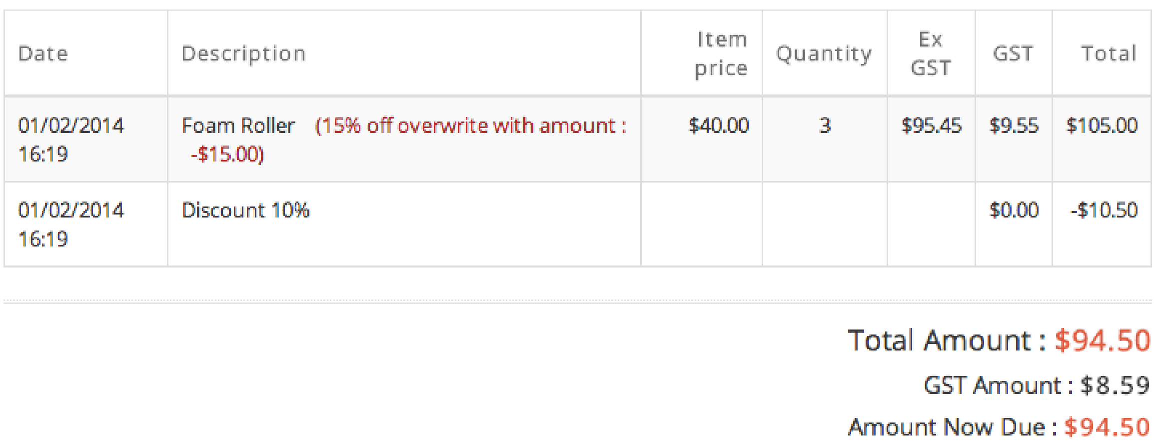
Applying discounts (individual and global) is similar to invoicing services items.



Click ‘Check out’ to land on the check out page, where you choose an existing client or quickly enter one (just for this sale, not registered as a new client).



Here is a sample invoice for selling products only (with discounts).

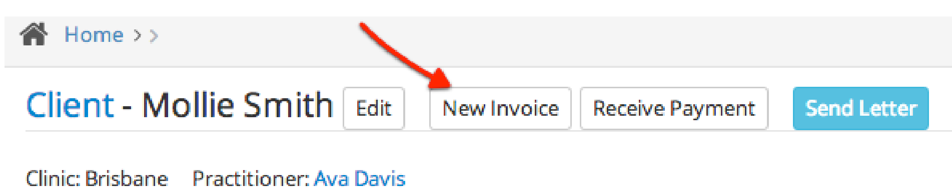


Date	Description	Item price	Quantity	Ex GST	GST	Total
01/02/2014 16:19	Foam Roller (15% off overwrite with amount : -$15.00)	$40.00	3	$95.45	$9.55	$105.00
01/02/2014 16:19	Discount 10%				$0.00	-$10.50

Total Amount : $94.50
GST Amount : $8.59
Amount Now Due : $94.50

5.4 Direct Invoice

You may create an invoice directly for a client. Find a client, and click 'New Invoice' button from the the client detail page.

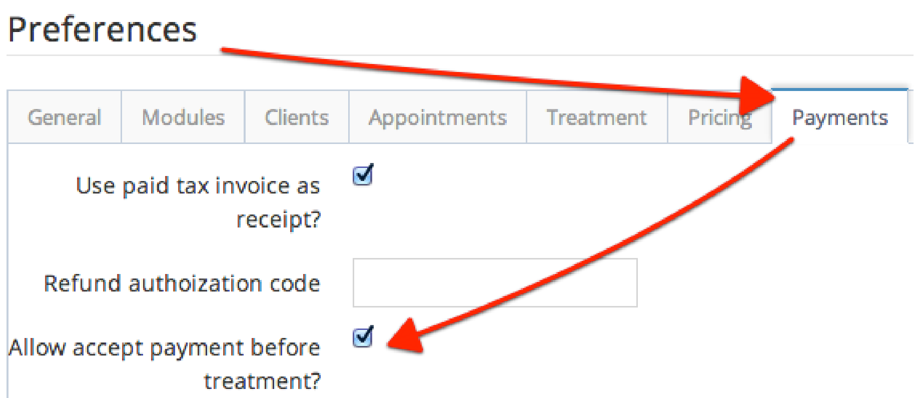


The invoice creation process is the same.

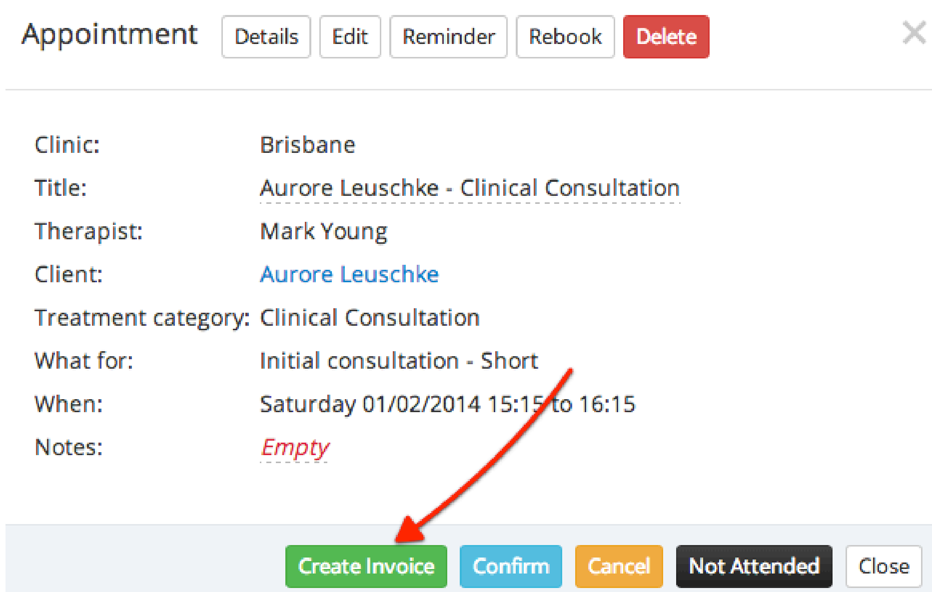
5.5 Create Invoice for Appointment

Quite often, especially for fixed-fee type health clinics such as physiotherapists, receptionists take the payment before the treatments starts (or during the treatment, paid by partners).

Firstly, login as admin, enable 'Pre payment' in settings (under Payment tab)



Open the appointment (must have one service item associated to), there is 'Create Invoice' button

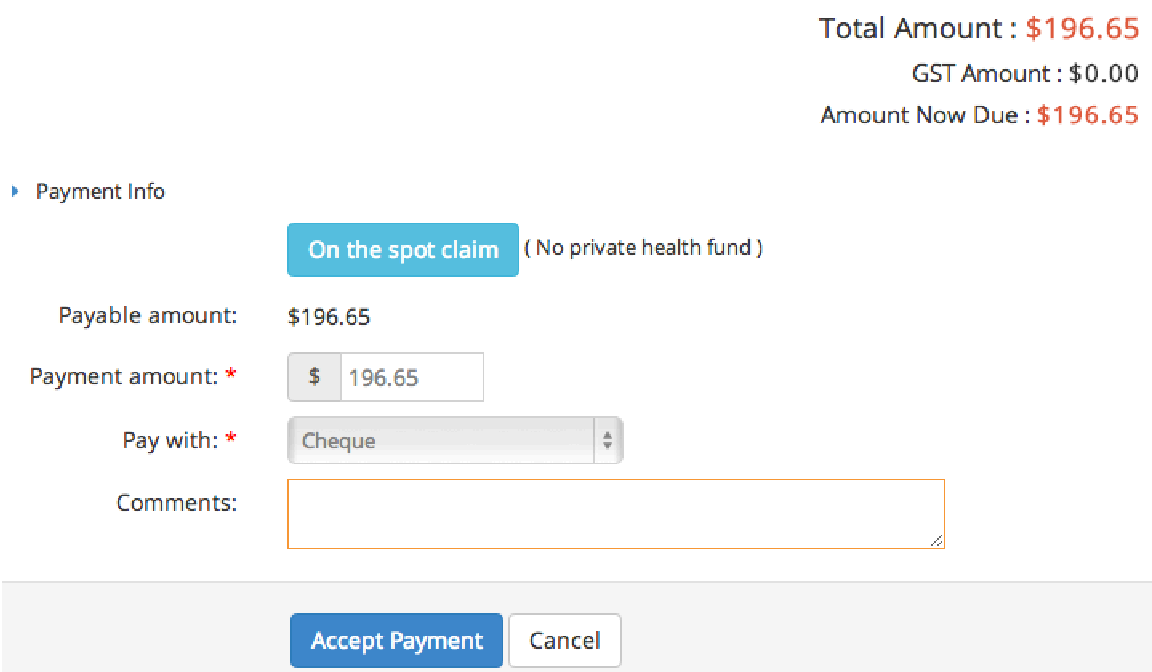


Click the invoice button to start the invoice creation process.

6 Accept Payments

6.1 Accept payment

At most times, receptionists accept payments on an invoice page (from Dashboard). After the invoiced items and total price, receptionists record payment amount and payment method (payment methods are set by Admin).



Here is a sample fully paid invoice.

Customer Invoice **Fully Paid**

Invoice No.: #712
Invoice Date: 01/02/2014

Print | Email | Book next appointment

Wise Physio

- ABN : 61 123 456 789
- 128 Wallaby Way
- Sydney
- Phone : 07 3000 4000
- Email : physio@clinicwise.net

- Client: Ralph Heller

Date	Description	Item price	Quantity	Ex GST	GST	Total
01/02/2014 16:06	Initial consultation - Long (20% off : -$48.00)	$240.00	1	$192.00	$0.00	$192.00
01/02/2014 16:06	Pilate Class - Single	$15.00	1	$15.00	$0.00	$15.00
01/02/2014 16:06	Discount 5%				$0.00	-$10.35

Total Amount : $196.65
GST Amount : $0.00
Amount Now Due : $0.00

- Payment Info

Payment Date	Ref	Paid by	Payment method	Amount
01/02/2014 17:20	711	Ralph Heller	Cheque	$196.65

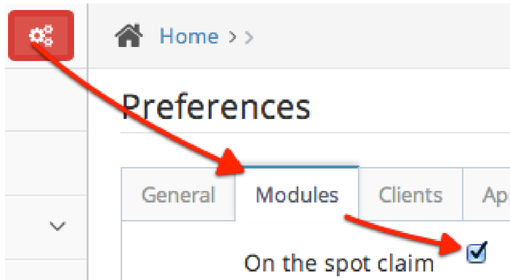
Total Payments : $196.65

Paid in Full on 01/02/2014

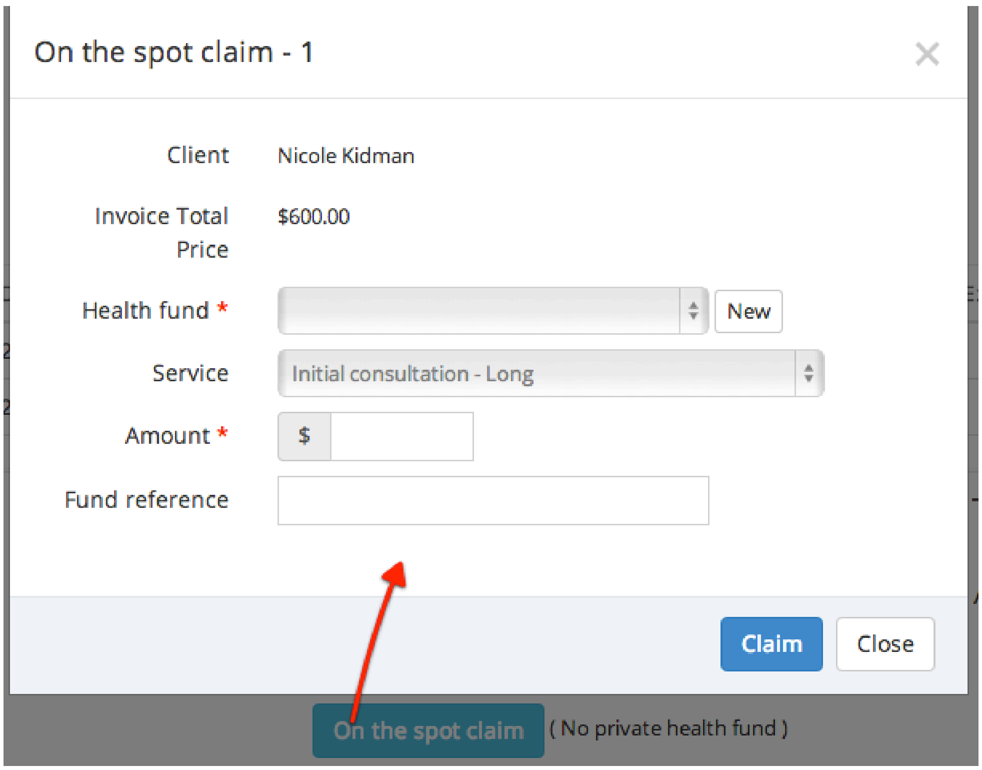
Click ‘Print’ to generate a PDF version of tax invoice (as a receipt).

6.2 Private Health Fund Claim

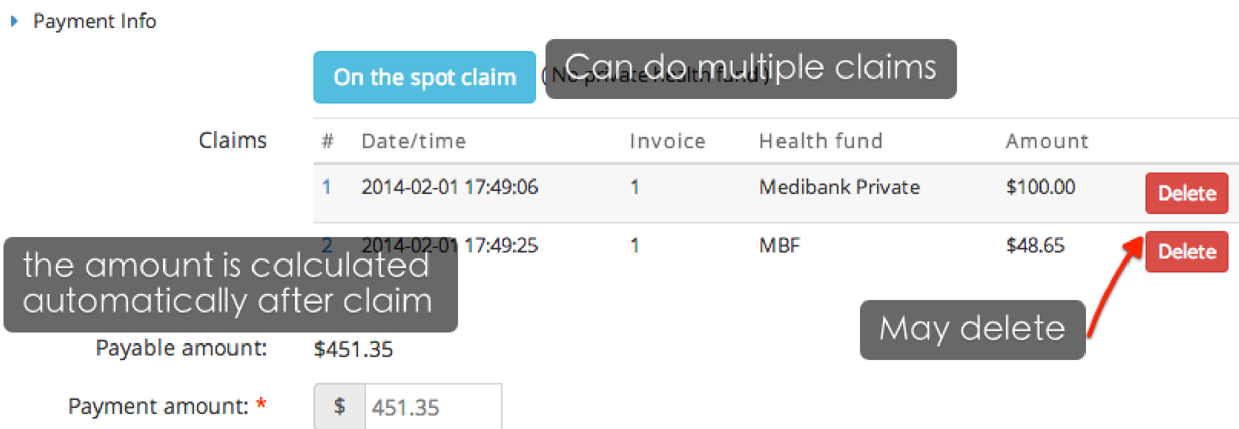
Firstly, make sure the ‘on the spot claim’ is enabled in settings.



On accepting payment (on invoice page), click ‘On the spot claim’ button.

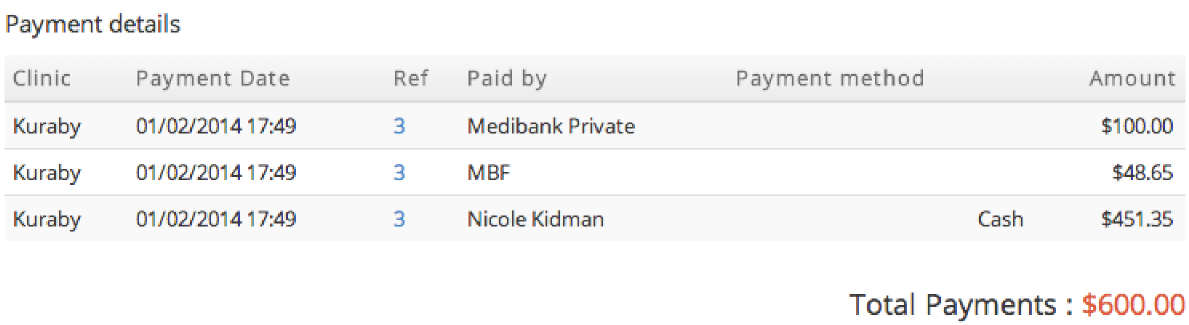


A pop up window allows you to select health fund and enter amount to claim.



The claims (can be more than one) are shown on the invoice immediately. Receptionists may also delete and add another one. The remaining balance is updated automatically after adjustment of claims.

Once the invoice is paid, the claim records are shown on the invoice.


Payment details

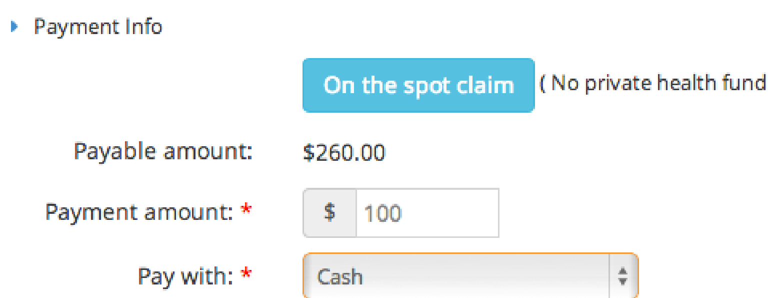
Clinic	Payment Date	Ref	Paid by	Payment method	Amount
Kuraby	01/02/2014 17:49	3	Medibank Private		$100.00
Kuraby	01/02/2014 17:49	3	MBF		$48.65
Kuraby	01/02/2014 17:49	3	Nicole Kidman	Cash	$451.35

Total Payments : $600.00

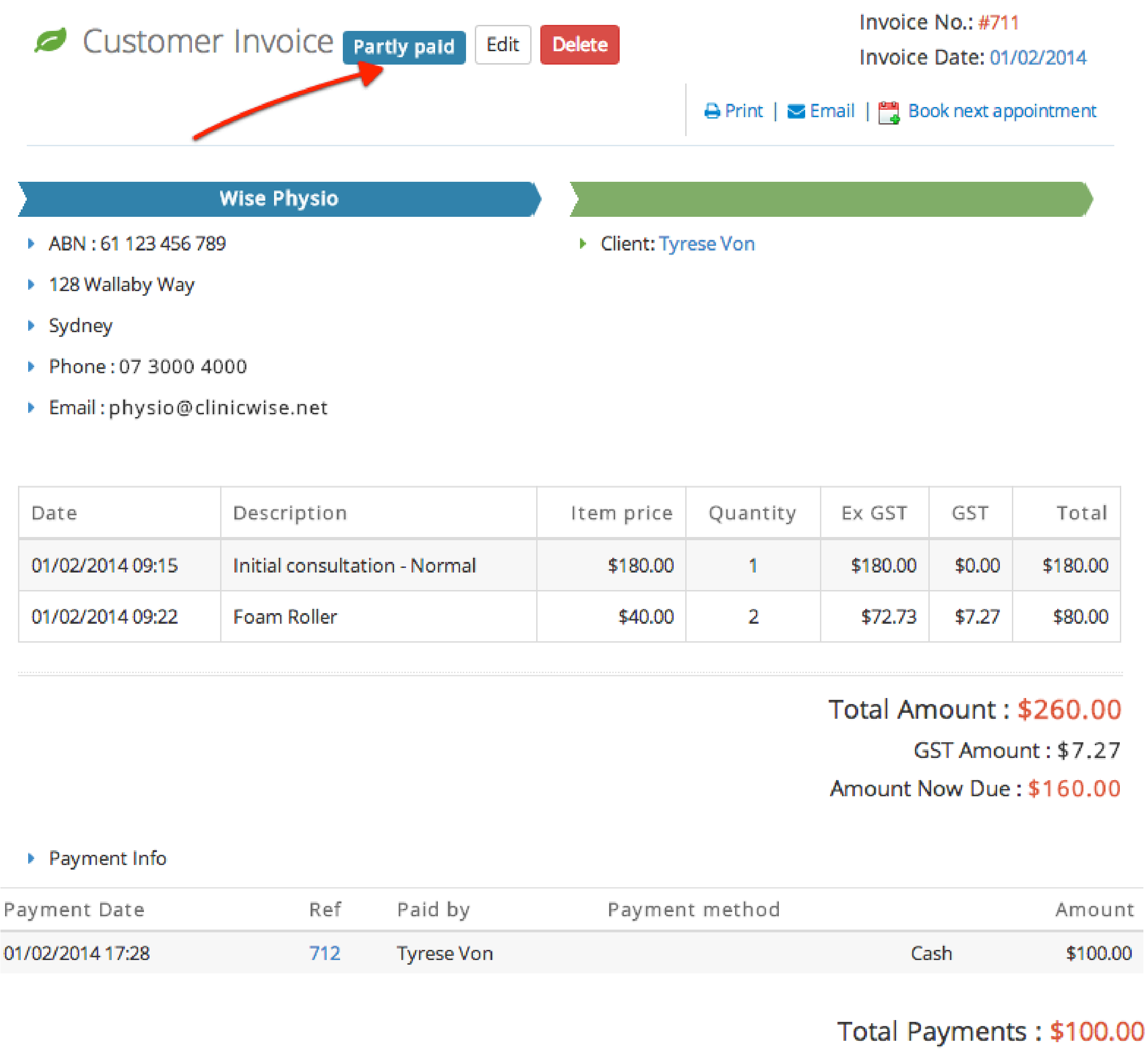
Also, the health fund claim records can be view separately. This can be useful for reconcilations with health funds.

6.3 Part Payments

ClinicWise also accept part payments. After an insufficient amount payment is accepted,



On the invoice, the status is now Partly Paid’



Customer Invoice Partly paid Edit Delete

Invoice No.: #711

Invoice Date: 01/02/2014

Print | Email | Book next appointment

Wise Physio

- ABN : 61 123 456 789
- 128 Wallaby Way
- Sydney
- Phone : 07 3000 4000
- Email : physio@clinicwise.net

- Client: Tyrese Von

Date	Description	Item price	Quantity	Ex GST	GST	Total
01/02/2014 09:15	Initial consultation - Normal	$180.00	1	$180.00	$0.00	$180.00
01/02/2014 09:22	Foam Roller	$40.00	2	$72.73	$7.27	$80.00

Total Amount : $260.00

GST Amount : $7.27

Amount Now Due : $160.00

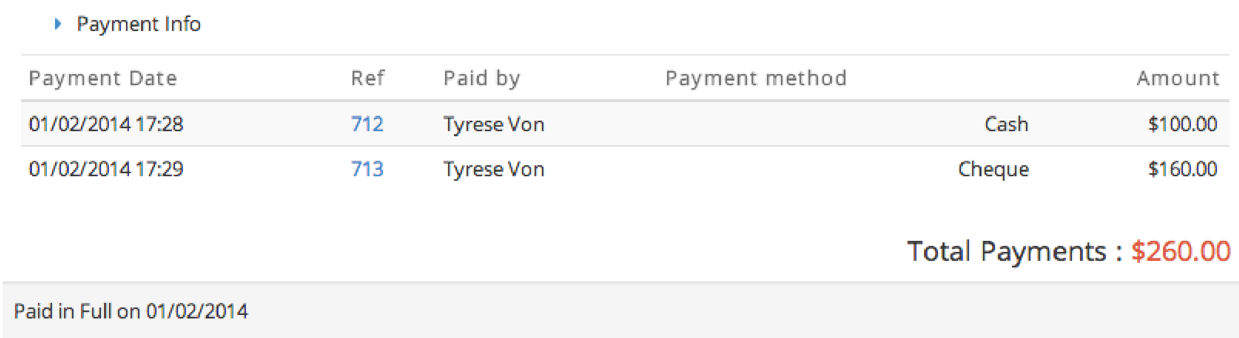
- Payment Info

Payment Date	Ref	Paid by	Payment method	Amount
01/02/2014 17:28	712	Tyrese Von	Cash	$100.00

Total Payments : $100.00

When it is paid full with next payments, the invoice status will be updated to 'Fully Paid'

Also the full payment history are shown on the invoice as well.



Payment Info

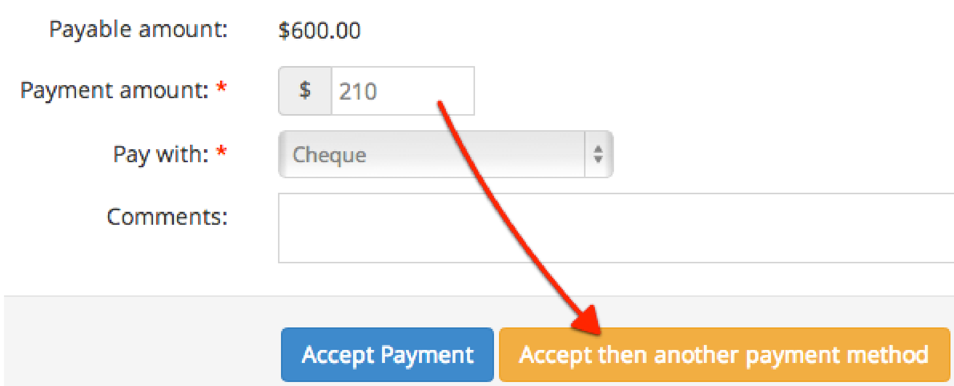
Payment Date	Ref	Paid by	Payment method	Amount
01/02/2014 17:28	712	Tyrese Von	Cash	$100.00
01/02/2014 17:29	713	Tyrese Von	Cheque	$160.00

Total Payments : $260.00

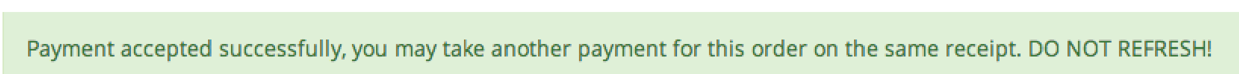
Paid in Full on 01/02/2014

6.4 Multiple Payment Methods

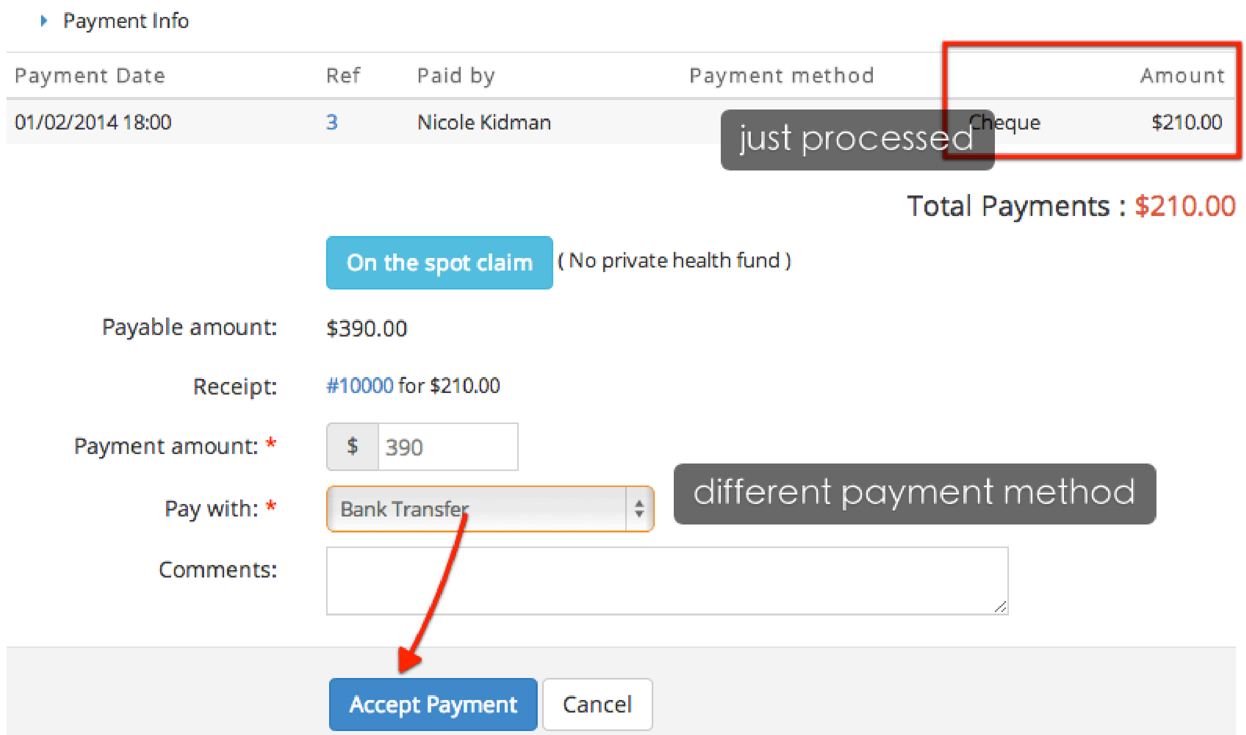
When an insufficient amount is entered, the system will show the button ‘Accept then another payment method’, click it.



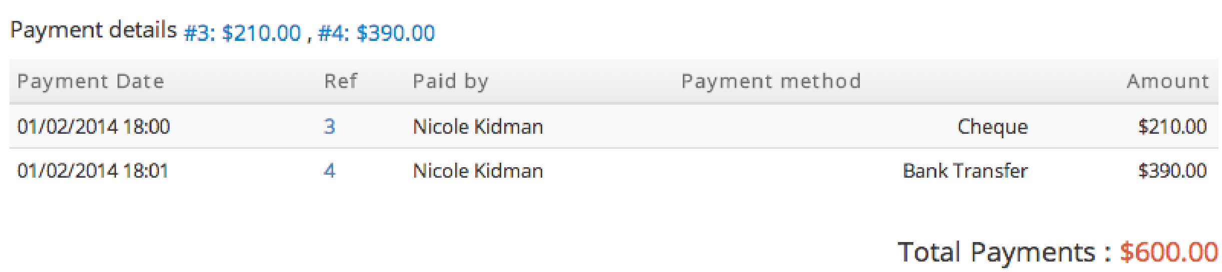
After the first payment is processed, the system will display a notice.



Then may take another payment with a different payment method

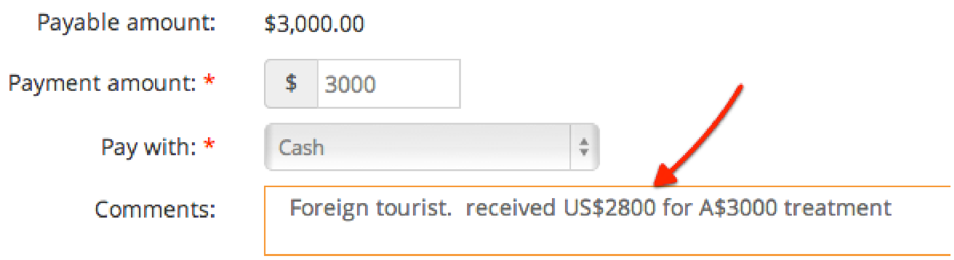


When all is done, this group of payments are shown on one receipt (or invoice depends the settings).

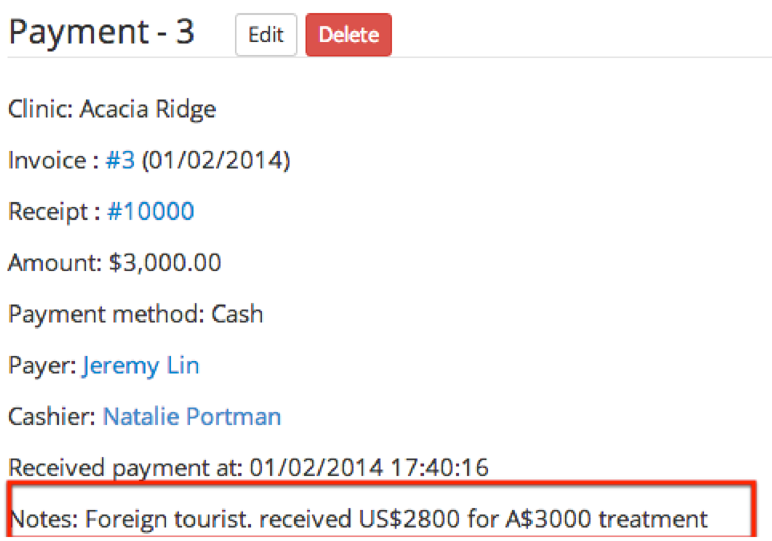


6.5 Special Payment Notes

The receptionist can enter special notes on payment. For example, if a client from a foreign country pay with a foreign currency. If manager allows, a note can be recorded for future reference.



This the payment record afterwards.

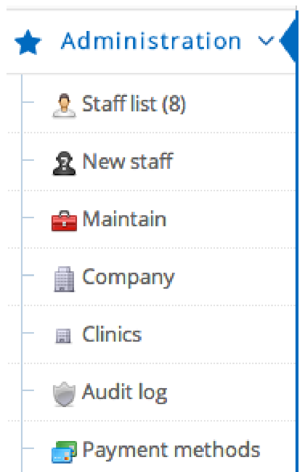


6.6 Refunds

6.7 Receive Payment without Invoice

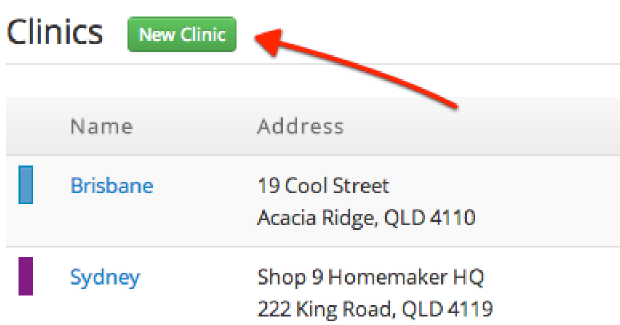
7 Administration

Only Admin User (default login: admin) can perform the following administration tasks .

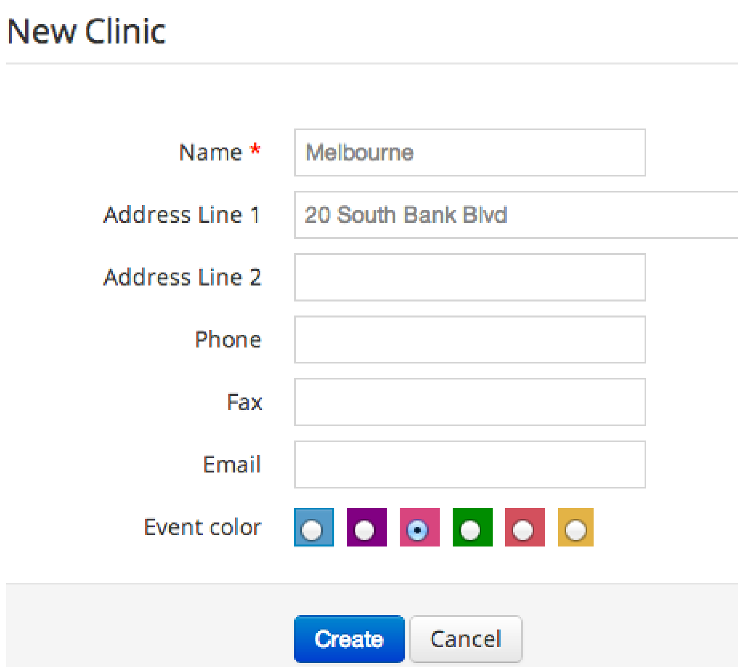


7.1 Add Clinics

A practice may have one or more clinics (or known as locations).



Special note on appointment color. In ClinicWise, to make appointments easy to distinguish, you may assign a color to one clinic's appointments.



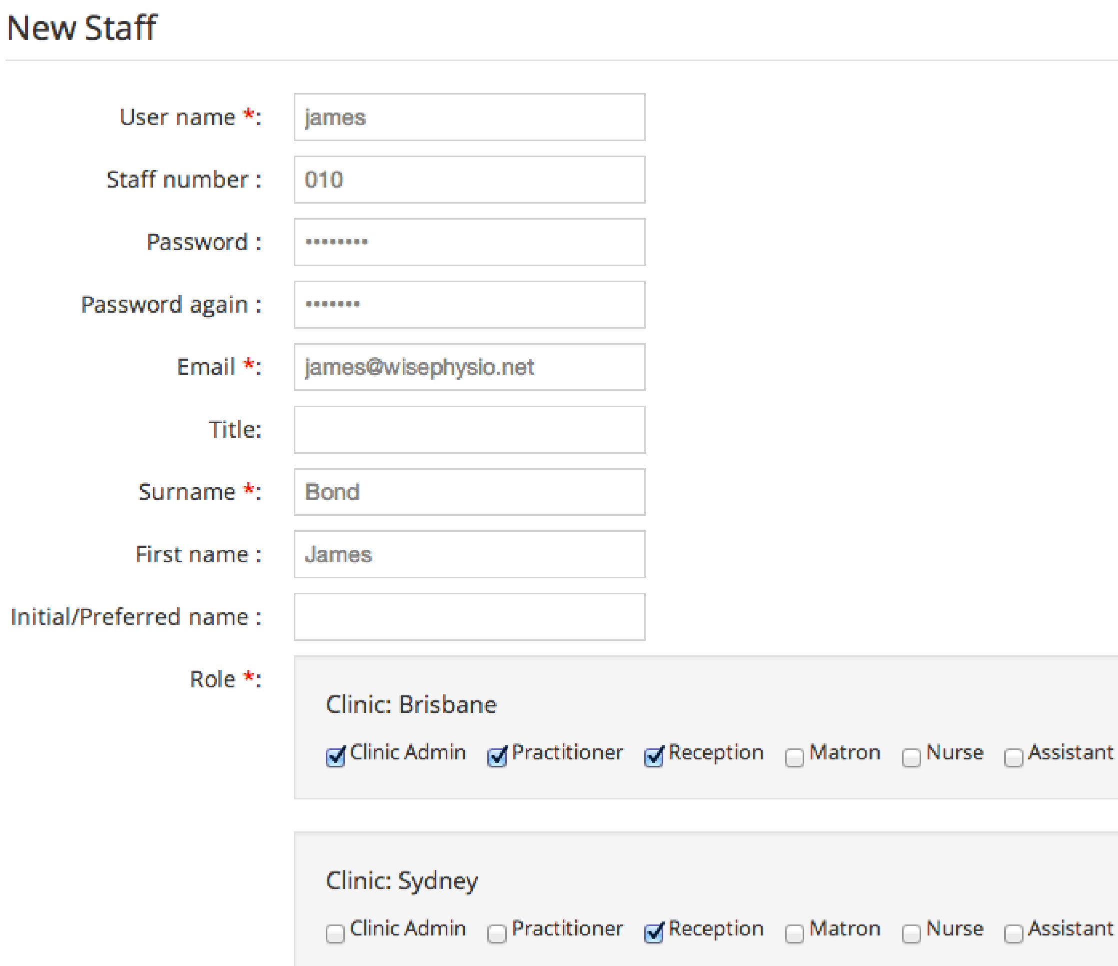
7.2 Add Staff

Admin can add staff and assign them to clinics. ClinicWise use role-based authorization. That is, a user can perform tasks based his/her roles. A user may have one more roles, and a role is associated to a clinic. For example, a user may be a practitioner at Clinic A and a receptionist at Clinic B.

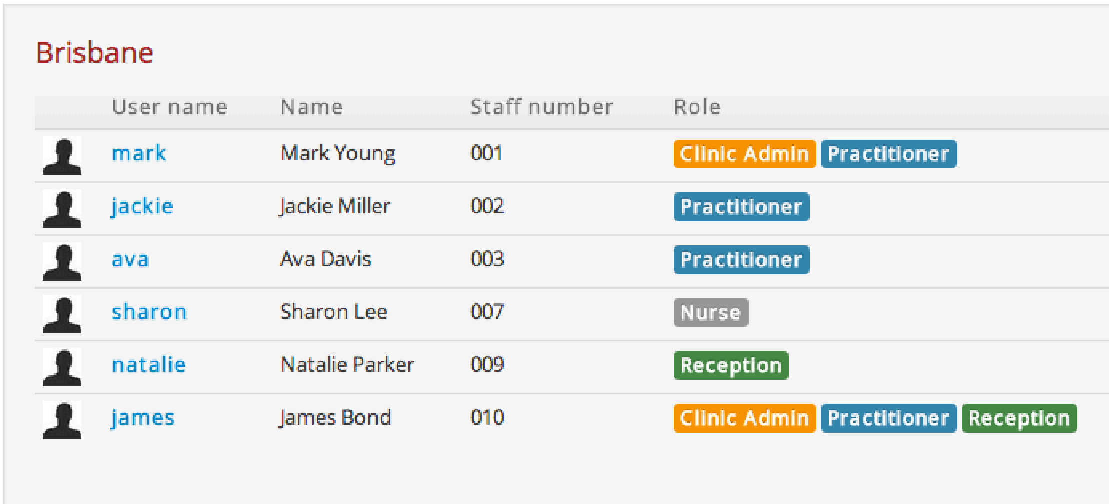
User Roles

- **Clinic Admin**. A branch administrator, who may view reports, perform admin tasks within assigned clinic.
- **Practitioner**. Treat clients.
- **Reception**. Manage appointments, invoices and payments.
- **Matron**. The lead nurse. May perform tasks such as: managing shifts, suppliers, factories and factory orders.
- **Nurse**. Very limited access to view calendar only.
- **Assistant**. Assistant to branch administrator. Can perform tasks such as: managing shifts, suppliers, factories and factory orders. Can view daily income summary.

To add a staff, click 'Add Staff' link menu on the left.



The important part is to assign correct roles. But don't worry you can make changes any time. You can view the staff and their roles by clicking the 'Staff list ()' menu.



Brisbane

User name	Name	Staff number	Role
mark	Mark Young	001	Clinic Admin Practitioner
jackie	Jackie Miller	002	Practitioner
ava	Ava Davis	003	Practitioner
sharon	Sharon Lee	007	Nurse
natalie	Natalie Parker	009	Reception
james	James Bond	010	Clinic Admin Practitioner Reception

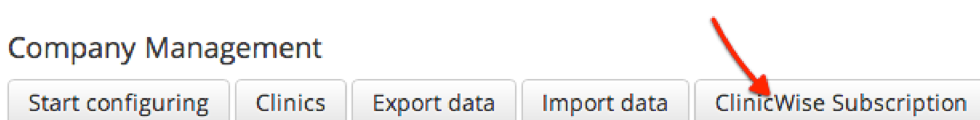
Sydney

User name	Name	Staff number	Role
tom	Tom Wilson	005	Clinic Admin Practitioner
lily	Lily Harris	006	Practitioner
sophia	Sophia Evans	010	Reception
james	James Bond	010	Practitioner

7.3 View Subscription

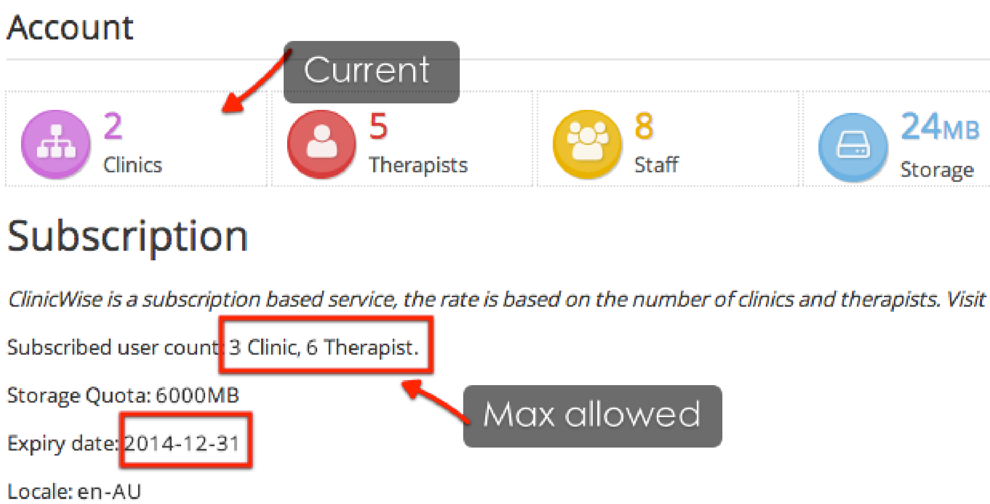
Please note that as the number of clinics and practitioners are limited to the maximum allowed by the subscription. (you may upgrade in ClinicWise Admin Site[1]) .

To view your current subscription, go to 'Dashboard', click 'ClinicWise Subscription'



to view your current usage and subscription details.

[1]https://clinicwise.net/app/sign_in


Account
Current
2
Clinics
5
Therapists
8
Staff
24MB
Storage
Subscription
ClinicWise is a subscription based service, the rate is based on the number of clinics and therapists. Visit
Subscribed user count: 3 Clinic, 6 Therapist.
Storage Quota: 6000MB
Expiry date: 2014-12-31
Max allowed
Locale: en-AU

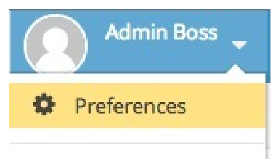
8 Settings

ClinicWise has many settings that Admin can customize to suit your needs.

8.1 View settings

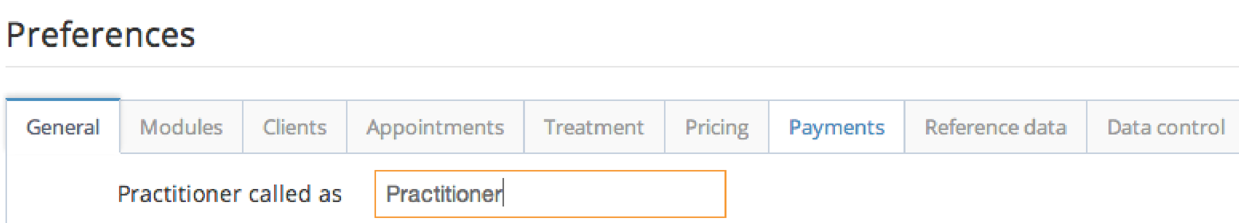
Admin can access to settings in two ways:

1. menu



1. Shortcut

Click the tabs (category) to view settings.



8.2 Update settings

Find the setting you want to change,

- enter text for textfields or

- check or uncheck for check boxes or
- select new option for dropdowns or
- remove or select multiple options for multiple selected options (explanation later)

All preferences take effect immediately.

General

- **Practitioner called as**. Just personal preference you want to see in the system, commonly used: “Doctor”, “Practitioner”, “Therapist”.

Modules

- **On the spot claim**. Patient can claim full or part of consultation fee from private health funds.
- **Client groups**. A certain type of patients, their consultation fee are fully paid by national medicare or an insurance company, which usually with certain limit. Such as Medicare EPC in Australia.
- **Letters**. Generate dynamic letter to email or to print.
- **Factory Orders**. Record orders sent to factories.
- **Follow Ups**. Record follow up telephone calls for patients.
- **Training Class**. Training classes (such as Pilates classes) with class registration and invoicing.
- **Shifts**. Simple recording staff shifts.
- **SMS**. SMS messaging.

Clients

- **Client Lock**. If this is turned on, patient records can only been seen by the assigned practitioner. Admin and the assigned practitioner can re-assign a patient to another practitioner.
- **Client address is mandatory**. Mandatory check for address when creating or updating a client record.
- **Client birth date or age is mandatory?**. Mandatory check for birth date when creating or updating a client record. If an estimated age is entered, the birth date is set to 1/1 and this will be noted in the notes.
- **Client uses full name?**. If it is on, no separation of first and last time for clients. This is normally used in Chinese clinics.

Appointments

- **Start and end time on diary**.
- **Showing all locations on calendar by default?**. If this is on. By default, diary will show practitioners in all clinics (locations) on diary.
- **Enable double booking**. No conflicts check on appointment times.
- **Highlight clients with account negative?**. Highlight clients with owing money.
- **Prefix practitioner initial in the front of appointment?**. Pre-append practitioner's initial to appointment titles (if not set).

Treatments

- **Treatment case fields**. The data fields for a treatment cases. Can select multiple. Also the displaying order is based on the selection.
- **Treatment record fields**. The data fields for treatment notes.
- **Practitioner must fill treatment records?**. If no treatment notes entered, system will give a warning and won't save it.

Pricing

- **The price of treatment is fixed, practitioner usually don't need to select pricing**. This setting is pretty much depend on what kind of your business. If it is on, practitioner just simply give the instruction to pay, without spending time to determine the fee (leave to receptionists). Physiotherapists, for example, probably use this one. On the other hand, Dentists may not, as treatment might often involve changes of services items.
- **Sales tax settings**. Please make sure this is set correctly for your country.

Payments

- **Refund authorization code**. The authorization code for issuing refunds.
- **Use paid tax invoice as receipt?**. Just use paid invoice as receipts. The receipts (similar format with title 'Receipt' will be still available.
- **Allow accept payment before treatment?**. Allow receptionists create invoices and accept payments before the treatment begin (or during the treatment, paid by partners). This is actually quite common for some type of clinics.
- **Show practitioner after line item description**. Display practitioner name on printed out receipt/tax invoice.
- **Thank note on receipt**. The note on receipts.
- **Receipt template**. Important, the template for printed receipts (PDF format).

Reference Data

Reference data are data type are common, the actual data might be different for different type of business or countries. For examples, the states of Australia, the states of USA and provinces of China. Please pay attention the format (by examining the current default value): starts with “[”, ends with “]”, quoted strings separated by “,”.

Data Control

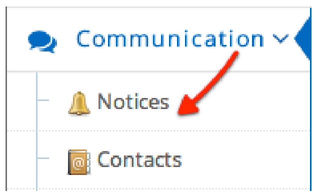
- **Receptionist can see payment records for up to**: Restrict non-admin, in this case receptionists, to access of payment records.

9 Internal Communication

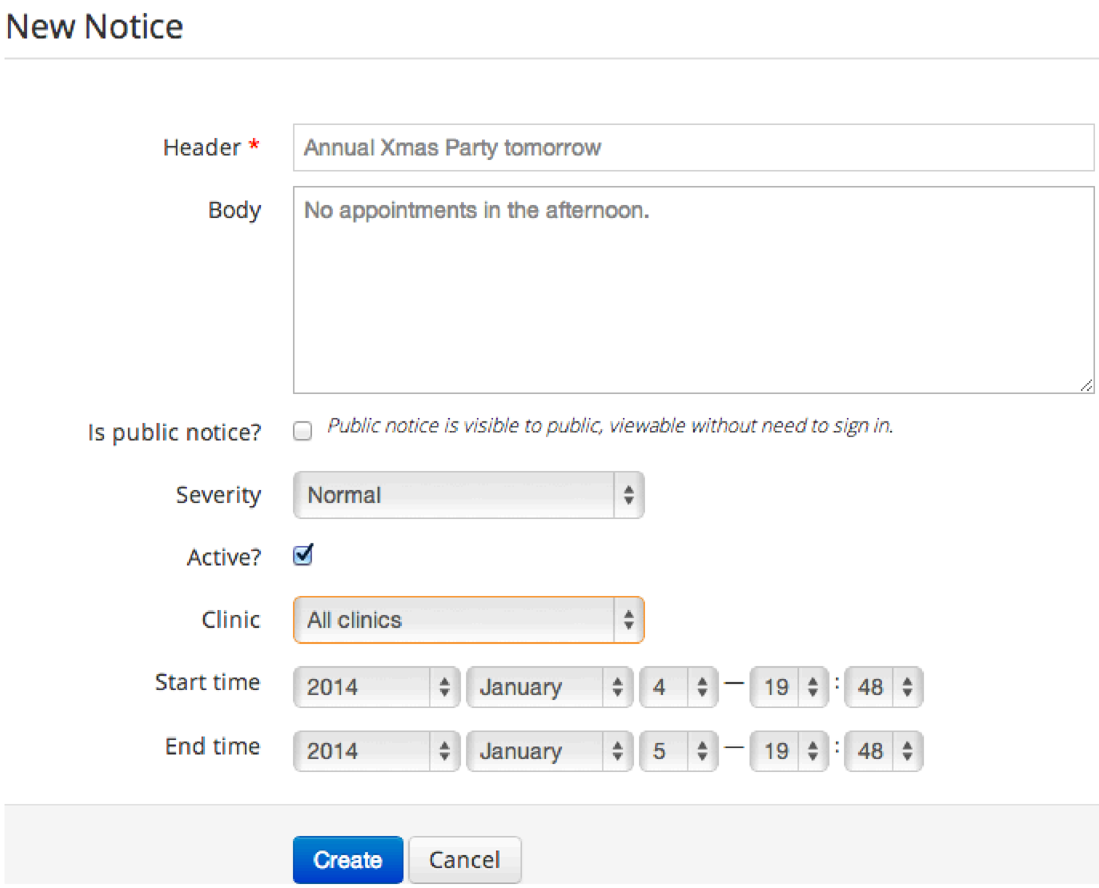
ClinicWise has some built-in functions to facilitate internal communication between staff. (For external communication with clients or professionals, see and)

9.1 Public/Internal Notices

Only Admin can publish notices.

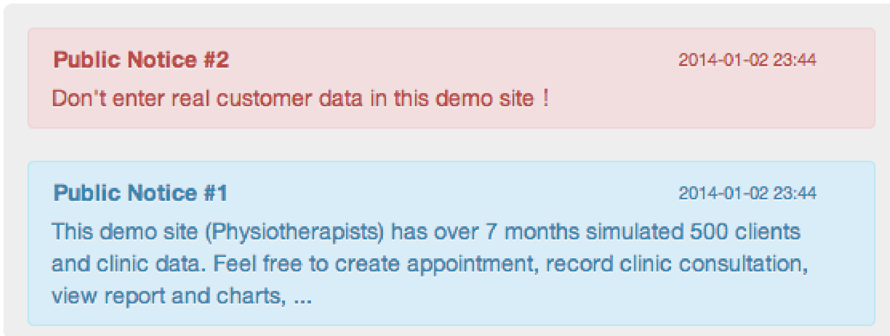


Click ‘Notices’ menu and then ‘New Notice’ link

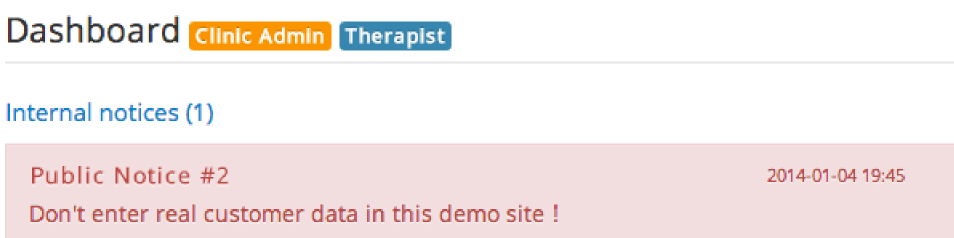


- **is public notices?**, public notices are shown on the home page (anyone visits the URL can see), where internal notices are shown to staff who signs in the system.
- **Severity**, which decides what error will be used to indicate the importance or urgency of the notice.
- **Clinic**, can set the notice for all or specific one only.
- **Time**, the time period when the notice will be shown. Please note it is just the time for showing the notice, not the event time. If the notice period is passed, the notice will be hidden.

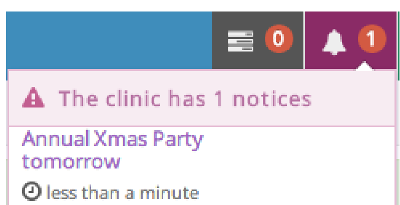
Here is an example of showing two public notices on the site's home page.



Here is an internal notice showing on Dashboard page (landing page after a user signs in)

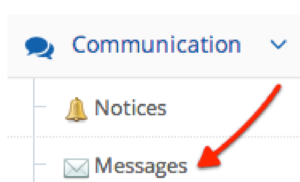


Also, outstanding notices are flagged on the top.

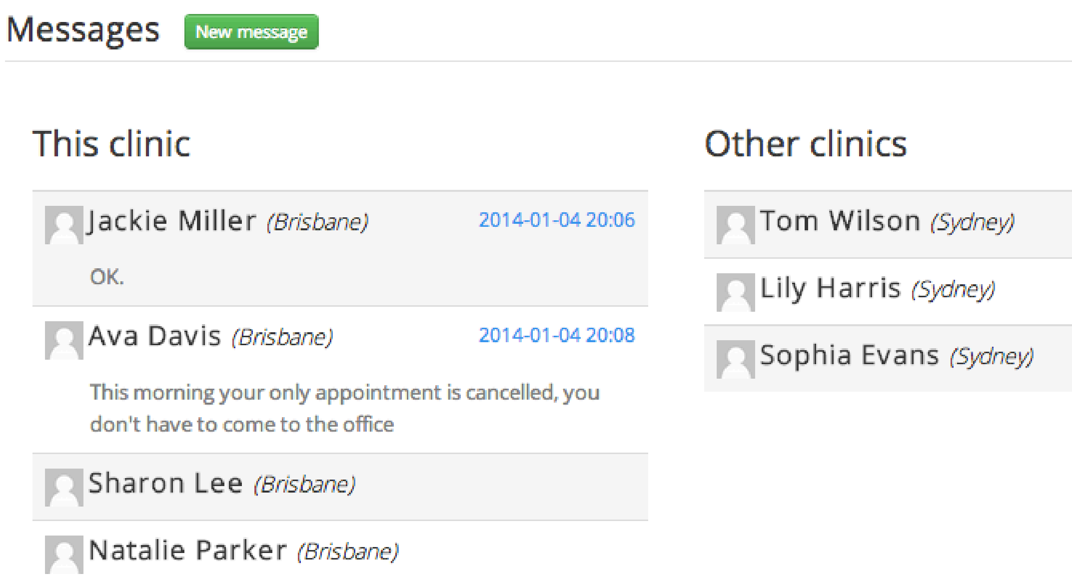


9.2 Internal Messaging

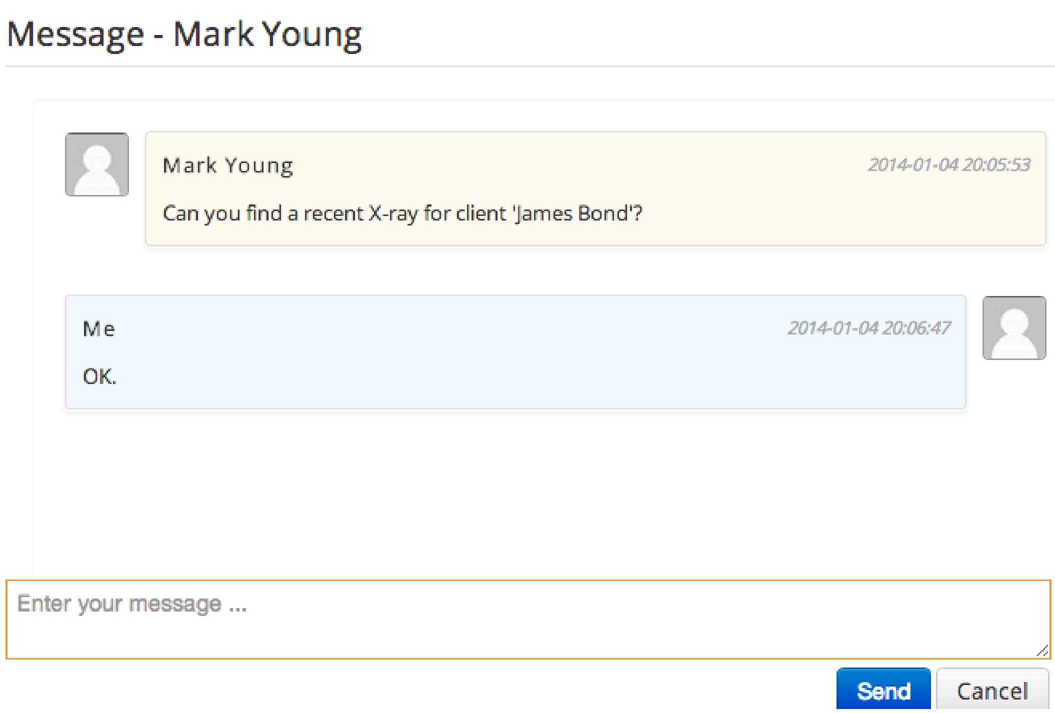
Internal messaging enables staff to quick send text message among each others, across clinics.



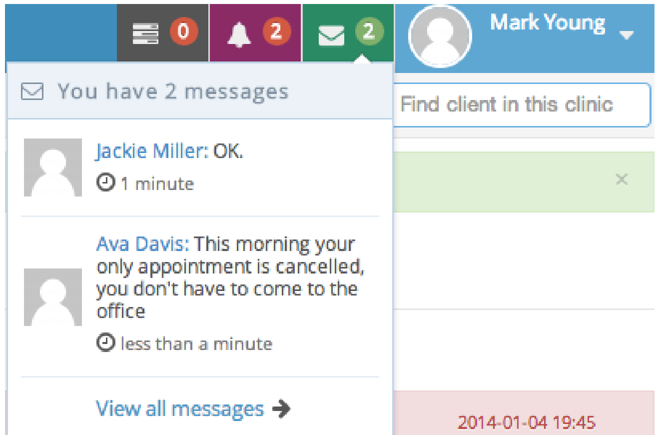
Click the 'Messages' menu to view all staff and recent messages received.



Click a colleague name to send a message.

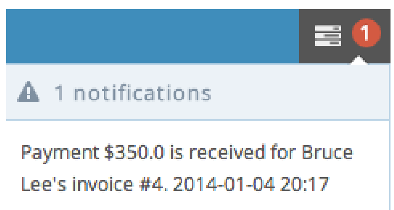


The number of new (unread) messages are flagged on the top, with quick overview.



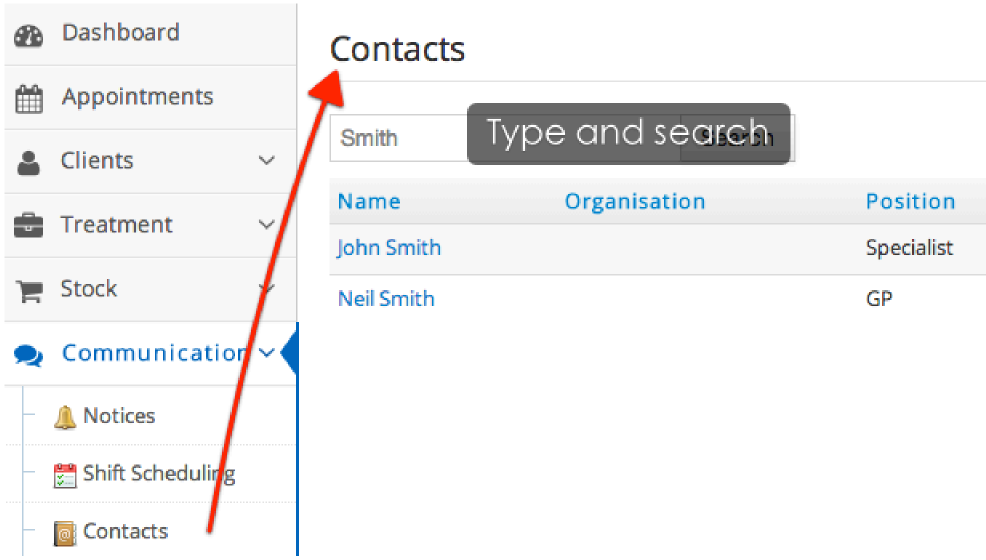
9.3 System Notifications

A system notification is a notification of passive event. One type of notification is available, that is, a practitioner receives a system notification when a client pays for the consultation.



9.4 Contacts

Contacts like an address book, stores a list of professionals.



Contacts also integrates with Sending letters, which can generate dynamic letters (such as referral letters) using contact fields.

10 Appointment Reminders

There are great benefits to send appointment reminders inside practice management system such as ClinicWise:

- Much greater efficiency, cutting over 90% human processing time.
- Less mistakes in sending and message contents.
- Personalised and real time information in text messages by using templates.
- Easy to customise different text messages for different patient groups.
- Real-time indication

There are two ways to send appointment reminders to patients in ClinicWise: SMS Text Messaging and Email. SMS text messaging is the most common and regarded as the most effective way sending the reminders. (BMC Research: Text-messaging versus telephone reminders to reduce missed appointments[1]). Now more and more people have smart phones, which means Email is becoming another cost-effective communication method. Of course, calling patients is another method, the operation (usually performed by receptionists) is outside the ClinicWise system. However, result may be recorded on appointments (or make them as confirmed).

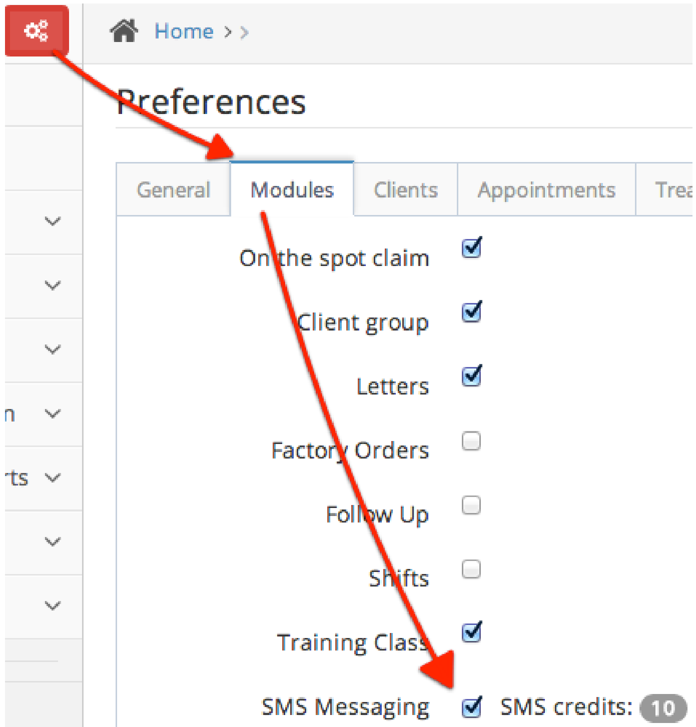
The SMS provider used in ClinicWise is Nexmo[2], a well established global SMS platform). The pricing for each text message is 10 cents per standard text message (longer text is)

The email sending in ClincWise up to a certain limit (a big number, which unlikely to reach for small and medium clinics) is free.

10.1 Enabling SMS Messaging

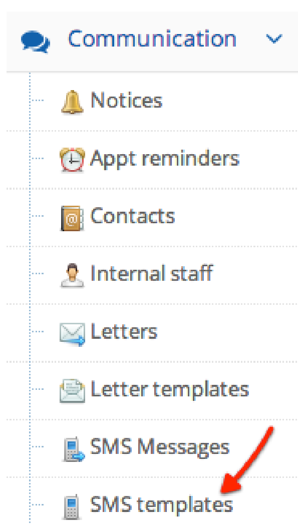
Sign in as 'admin', make sure the 'Modules' > SMS Messaging is ticked.

[1]"http://www.biomedcentral.com/1472-6963/13/125"
[2]"http://nexmo.com/"

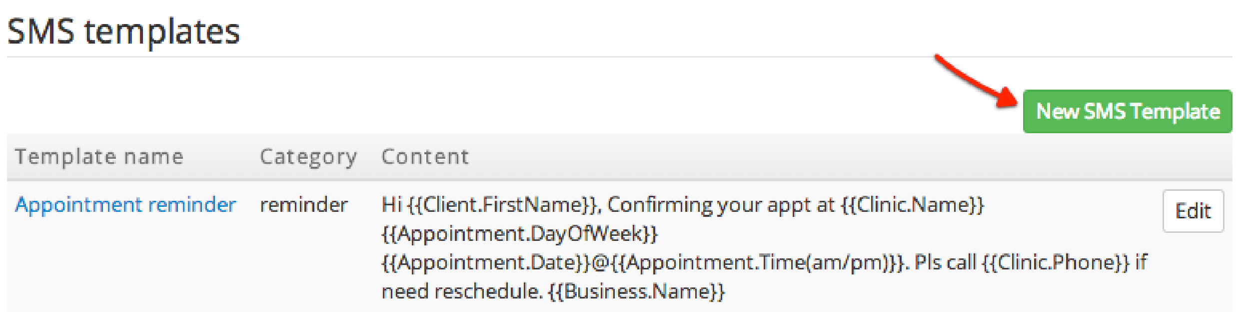


10.2 Add SMS Templates

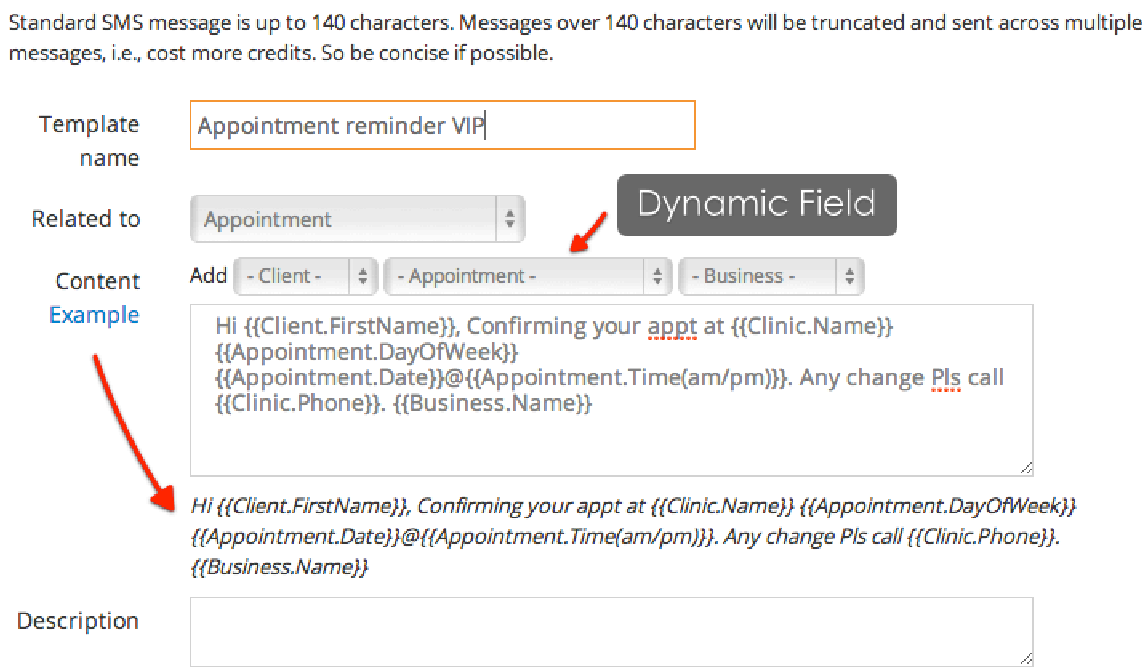
Before sending, set up one or more SMS message templates (the system includes a default one).



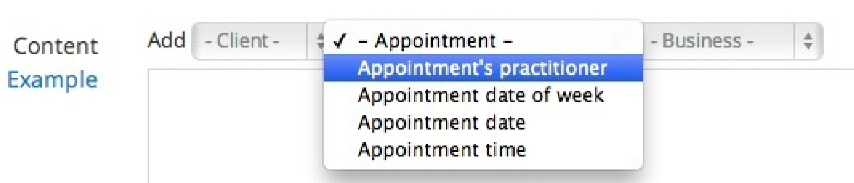
Click the 'SMS templates' menu on the left to see the list of SMS message templates.



You may add a new one or edit an existing one



During editing, you may use dynamic data fields. For example, Select “-Appointment -“ -> “Appointment’s practitioner”.



The system will insert the below into the template content:

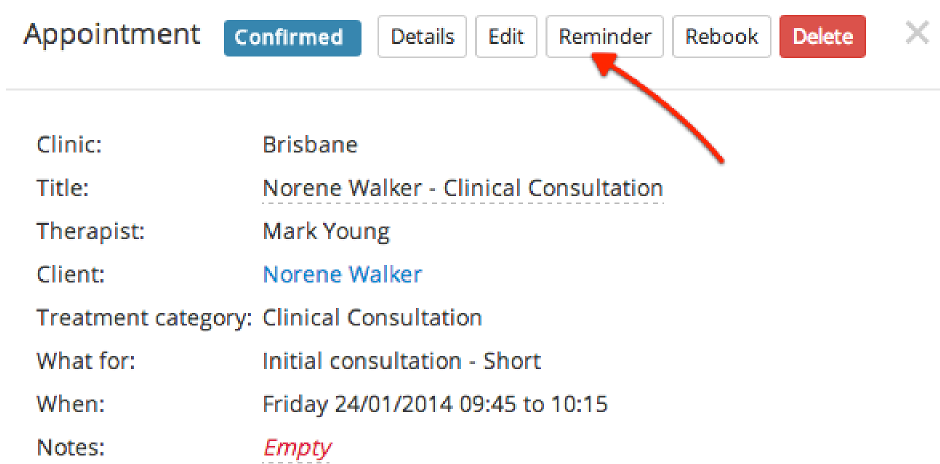
```
{{Appointment.Practitioner}}
```

When generating individual messages, it will be substituted with the data related to that appointment.

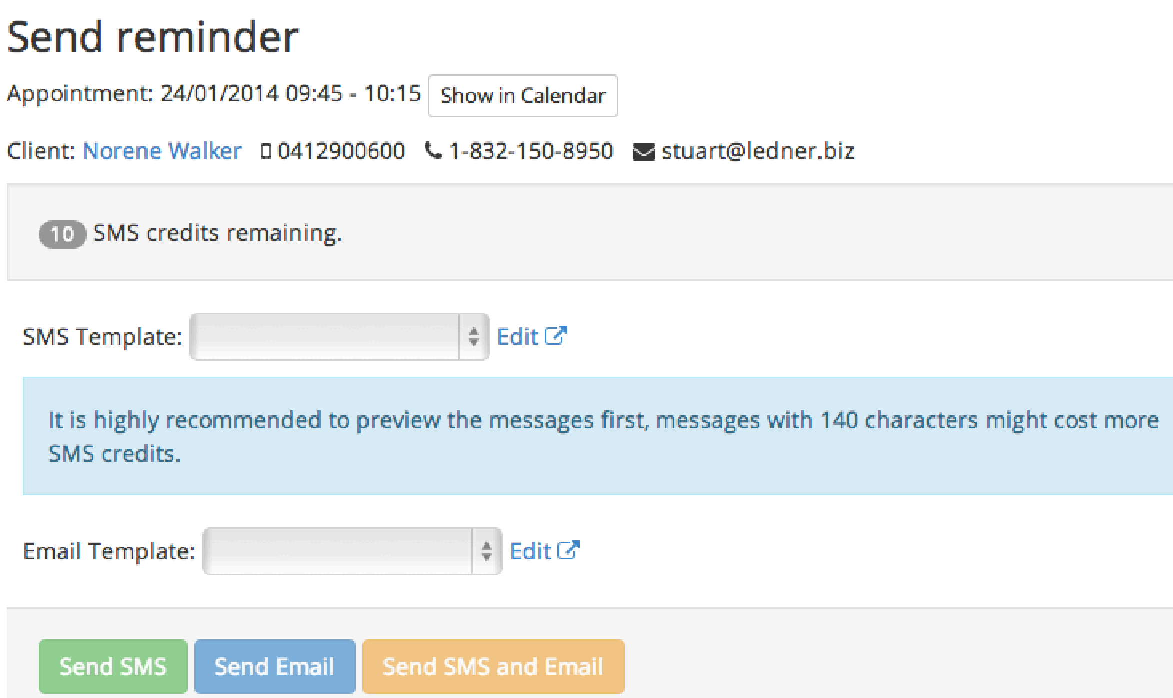
Don't worry if you might not get it right. On sending reminder page, you can conveniently preview generated text messages, and edit the template if necessary.

10.3 Send appointment SMS reminder to an individual client

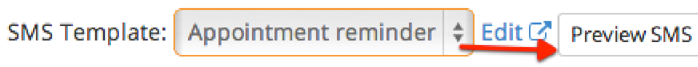
Open the appointment on diary, click 'Reminder' button.



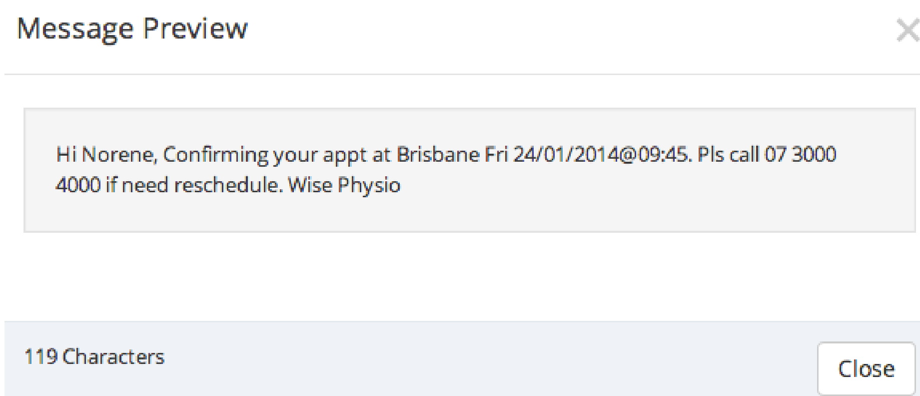
On the sending reminder page, the appointment and client information are displayed.



Select a pre-defined template (you may create a new one then come back).

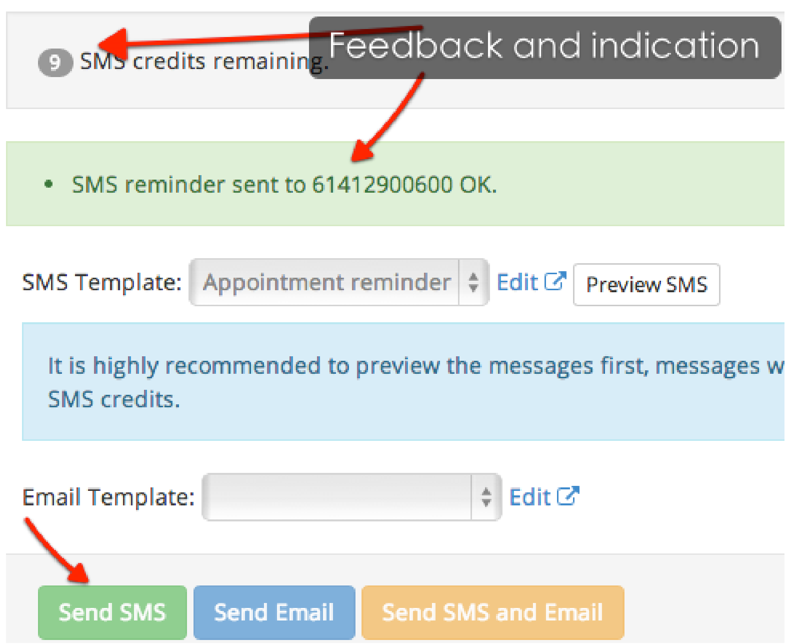


Click 'Preview SMS"



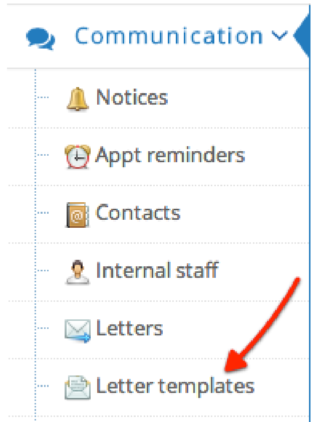
The number of characters is displayed at the bottom left corner. When over 140 characters, it will cost an extra SMS credit.

After being satisfied with the message content, click 'Sned SMS' button the text message.

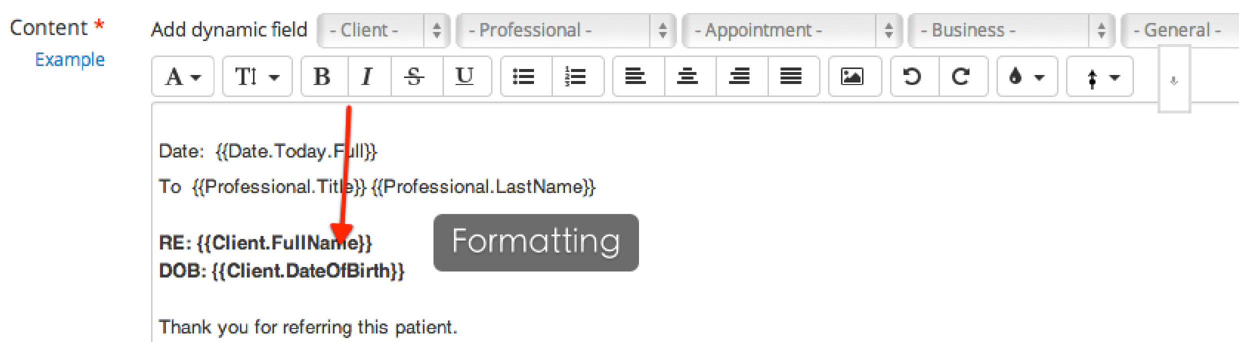


10.4 Set up Email template

Set up email template for appointment reminders is very similar to SMS templates.



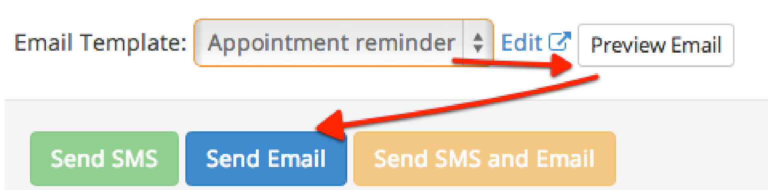
But with more dynamic fields and text formatting (such as bold, indenting, color, ..., etc).



10.5 Send appointment Email reminder to an individual client

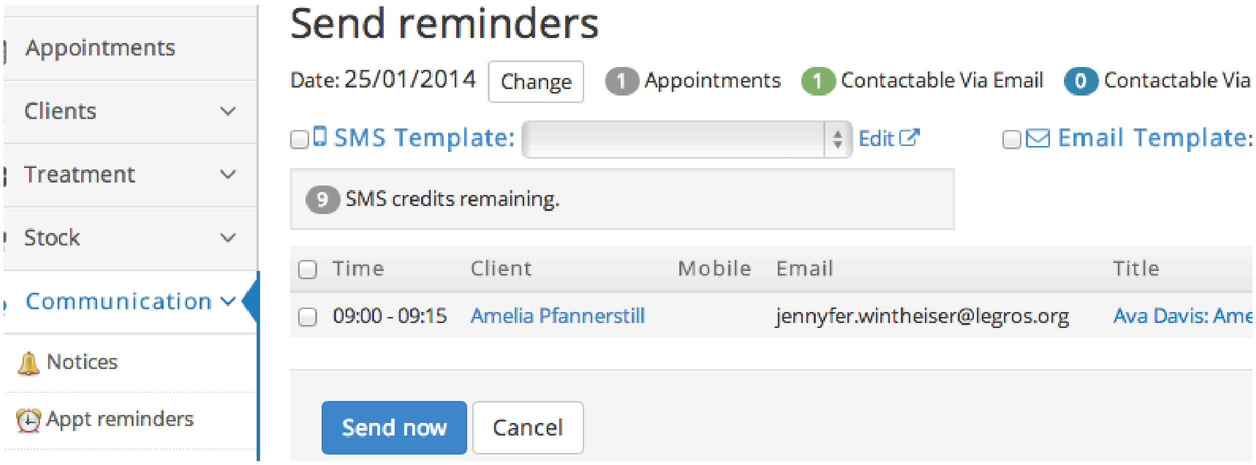
Sending appointment Email reminders also starts from opening the appointment in Diary, clicking 'Reminder' button.

After selecting an Email template, click 'Preview Email' to check, then click 'Send Email' to send it out.

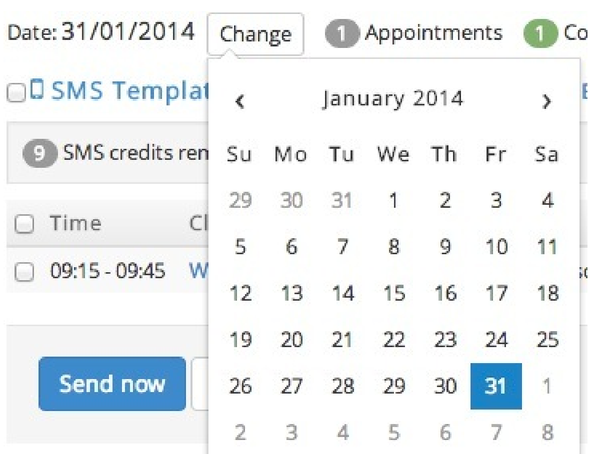


10.6 Send reminders for all appointments in a day, by email or/and SMS

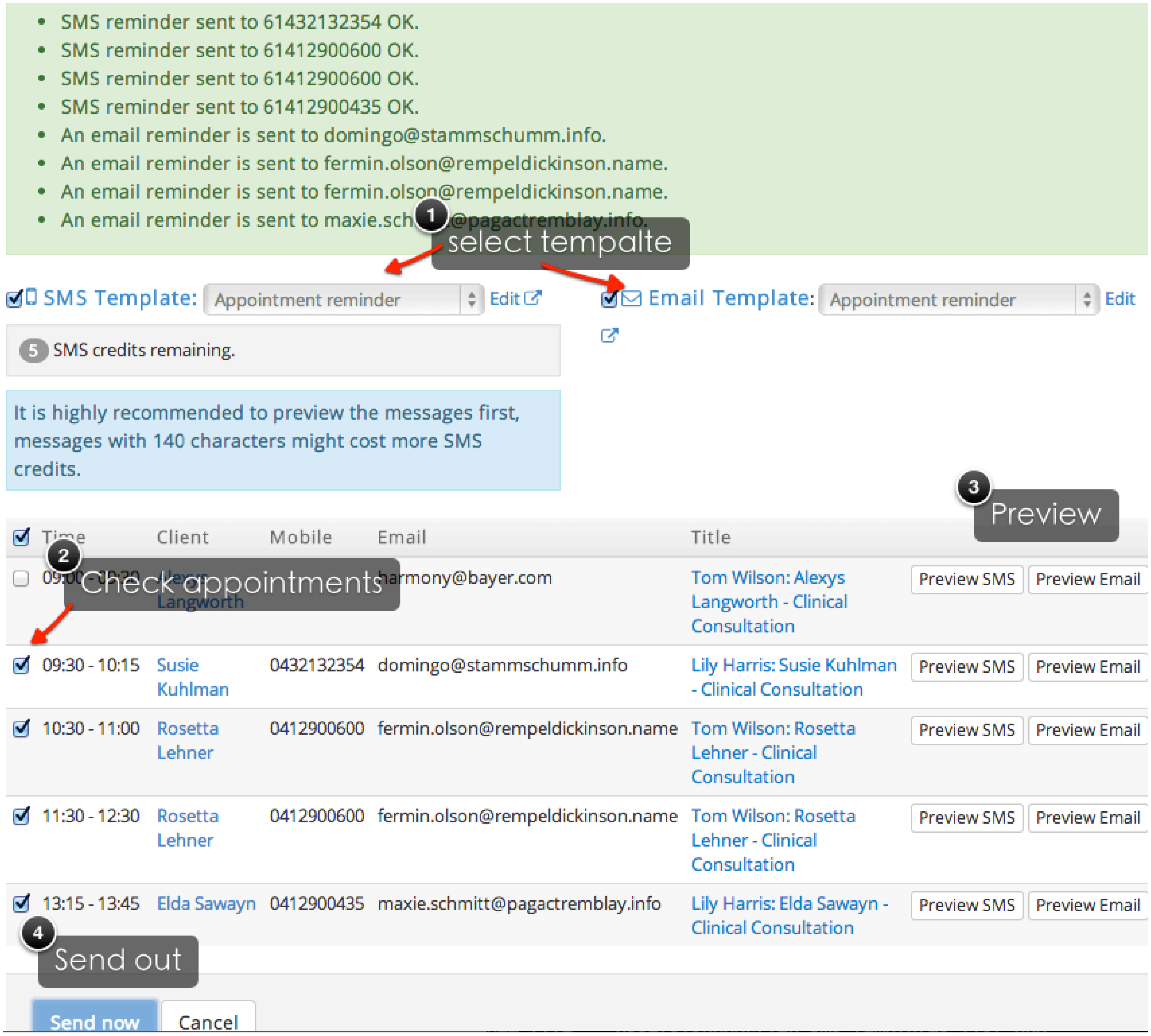
This is a more common: sending all appointment in a specific future date.



The default date is tomorrow, but you can easily change it.

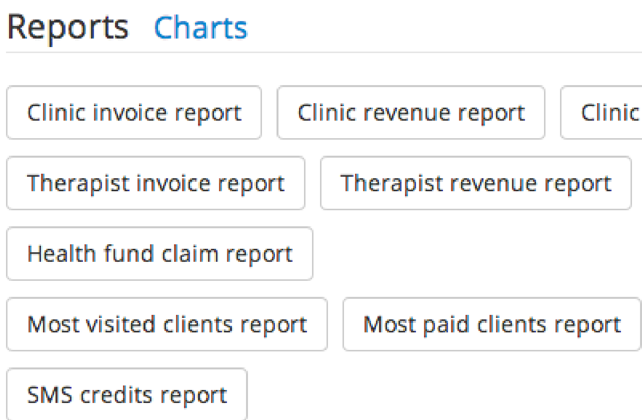


You can choose to just send SMS or Email, or both. Select template, check one or more appointments, preview message or email, and then send.

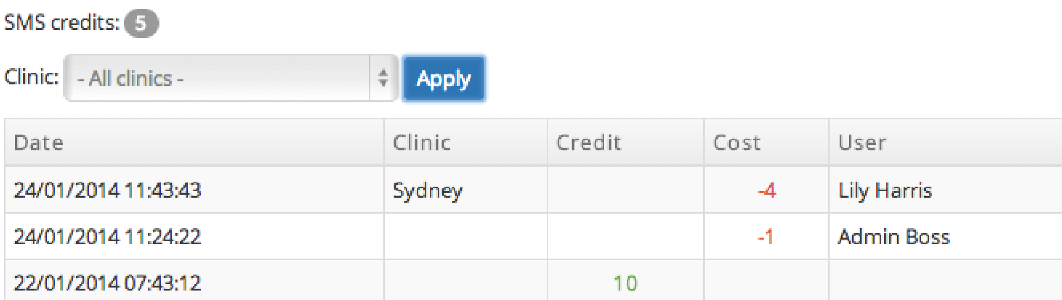


10.7 SMS report

Admin can check out the SMS report.



Here is an example report.



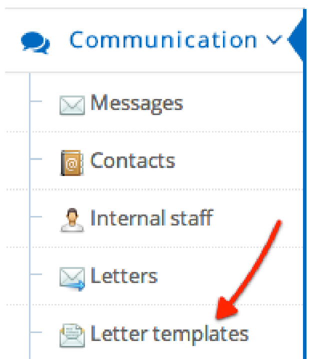
Date	Clinic	Credit	Cost	User
24/01/2014 11:43:43	Sydney		-4	Lily Harris
24/01/2014 11:24:22			-1	Admin Boss
22/01/2014 07:43:12		10		

11 Letters

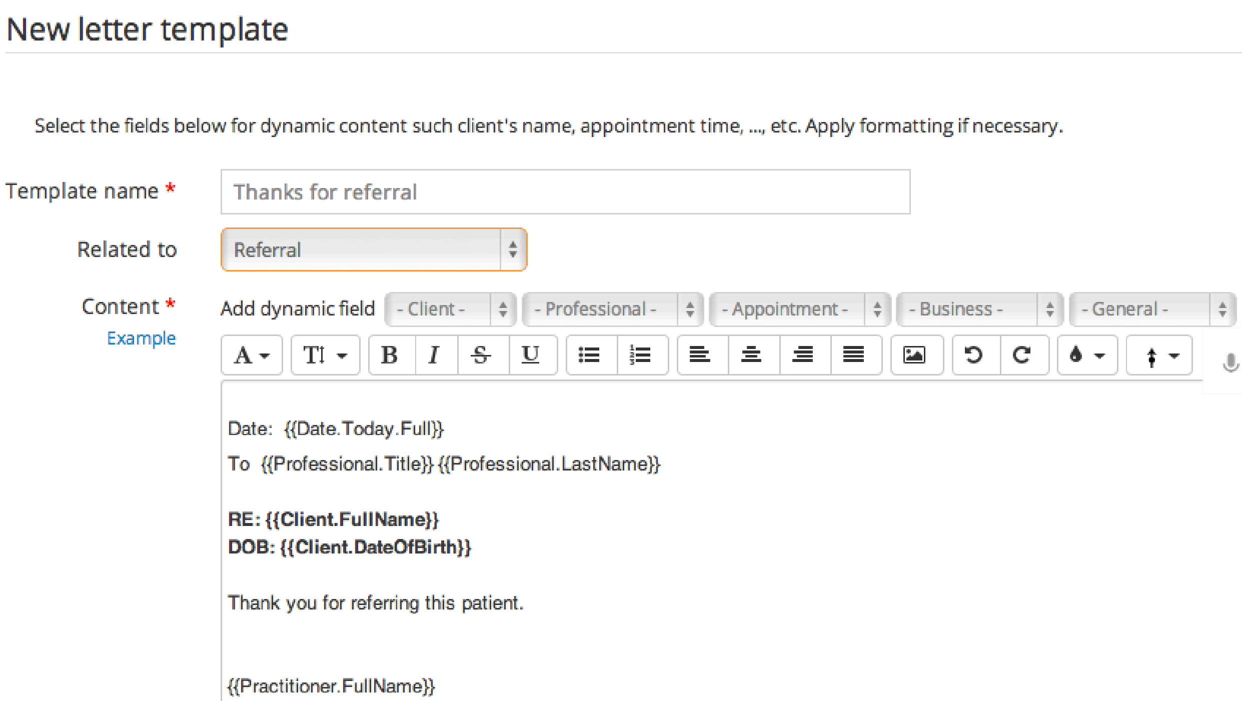
Letters are used for communication between the clinic and the clients, and sometimes professionals (e.g. referrals related). There are benefits of generate letters within ClinicWise (rather than created using Word):

- Accurate data. Using live data.
- Much quicker. By using templates, the letters content are generated instantly.
- Cheaper. Big savings on human processing time, and avoid another software.
- By Email or Print then post, or both.

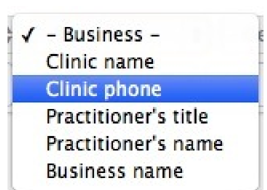
11.1 Manage Letter Templates



Create a new letter template



The dynamic fields are in the format of `{{Date.Today.Full}}`. However, you don't need to remember them. Just choose from a drop-down list.



The system will insert the corresponding dynamic field into the content. (you have the freedom to delete them just like any other editor).

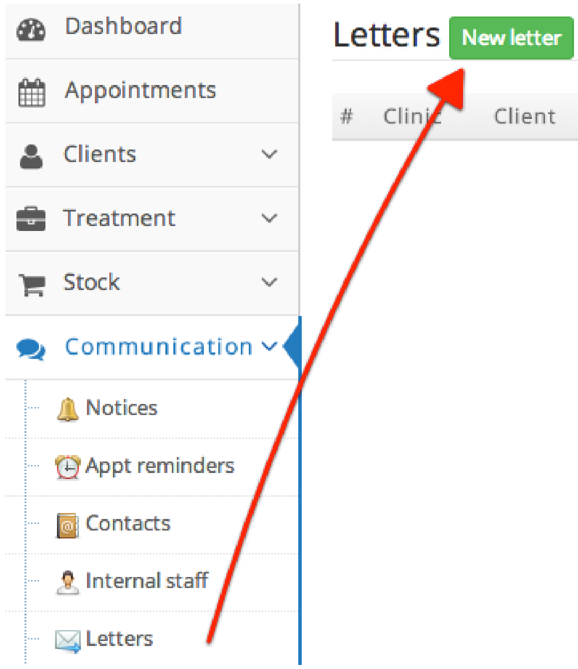
```
{{Clinic.Phone}}
```

Edit, Delete letter templates

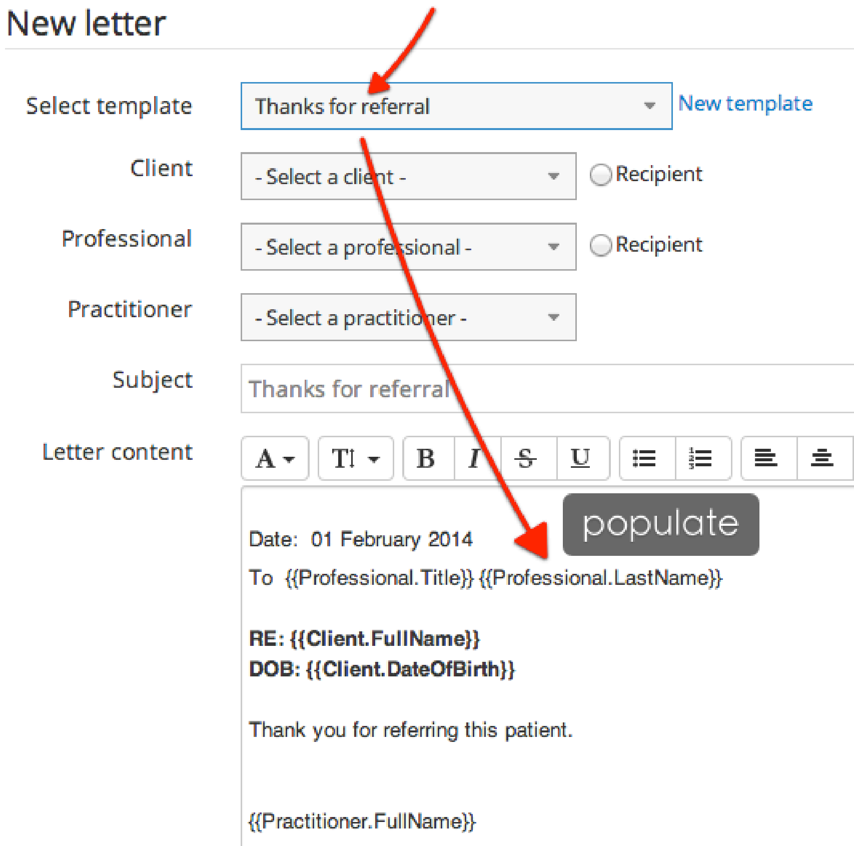
Same usage like many other functions.

11.2 Create Letter

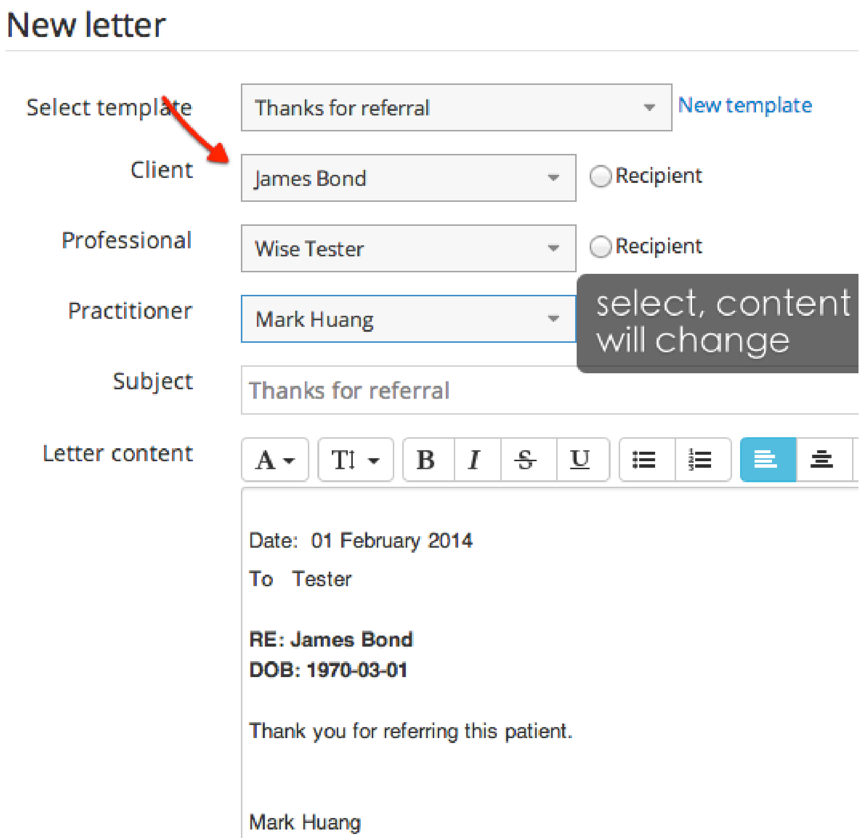
Once you have defined letter templates, you can now create letters.



Select an existing template. The content of the selected template will populate the content.



Then select value in each drop-down list. As you select, the content of letter will update accordingly: replace the dynamic field with your selected data.

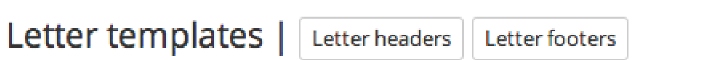


Here is what is displayed for a created letter.

After generation, you are free to change it!

11.3 Manage Letter Headers/Footers

Letter headers and footers are for generating letter in PDF for printing.

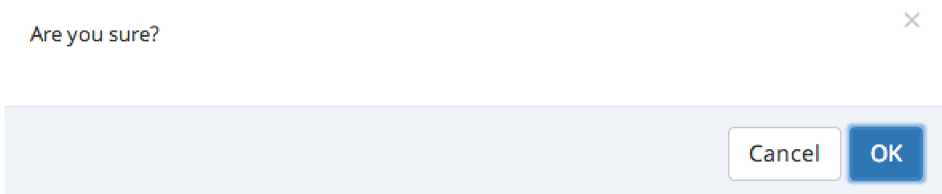


Creating and editing headers and footers are very similar to letter templates.

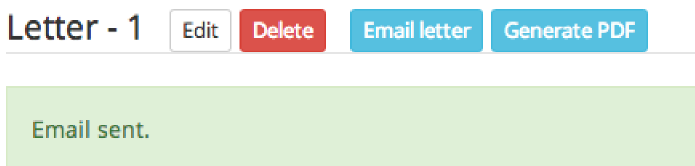
11.4 Send Letter by Email

To send letter by email, firstly make sure the recipient has a valid email address. Open the letter, click 'Email letter' button.

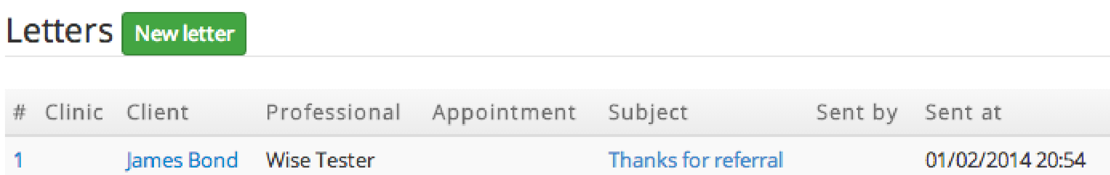
Click 'OK' in confirmation dialog,



After a short while, there shall be a notification of sending.



You may also find the letter list and see the letter's sent time.


Letters New letter

#	Clinic	Client	Professional	Appointment	Subject	Sent by	Sent at
1		James Bond	Wise Tester		Thanks for referral		01/02/2014 20:54

11.5 Generate Letter in PDF

To print a letter, generate it into a PDF file (the industry standard for printing format). Open the letter, click 'Generate PDF' button.

This is an example of generated PDF.

Wise Clinic

16 Maple Street, New Farm, QLD 4001
PH (07) 3234 5348

Date: 01 February 2014
To Tester

RE: James Bond
DOB: 1970-03-01

Thank you for referring this patient.

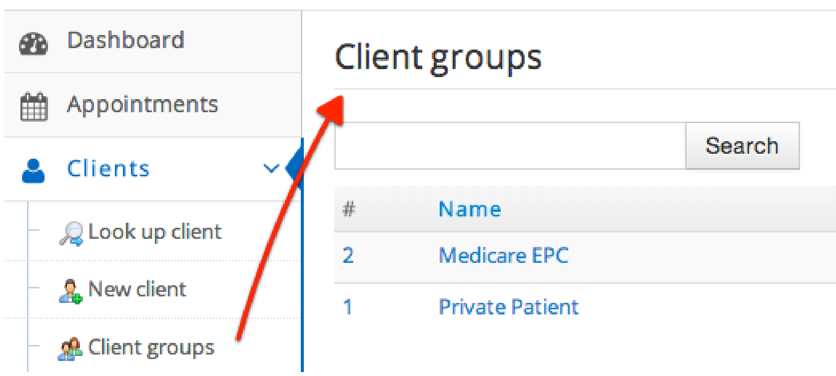
Mark Huang

12 Client Groups

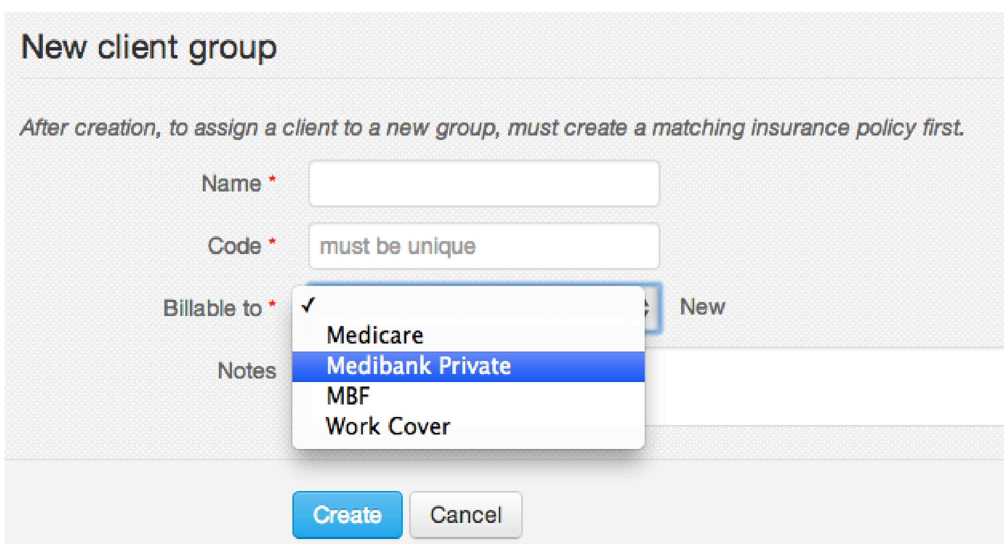
A client group is set up to identify the client's billable source. 'Private Patient' (including private Health Insurance holder) pays the full fee (may with health fund claims); whereas client group patients's bill was paid by its group. For example, Medicare EPC pays for qualified patients 5 therapies a year. A client may belong to multiple client groups. However for an appointment or treatment, only one client group can be selected for it.

12.1 Create Client Group

To create a new client group, start with the left side navigation menu.

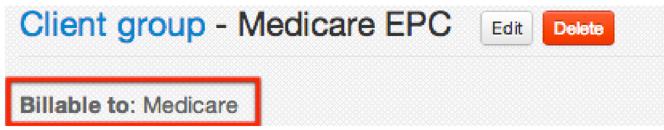


Then give a name and a code (must be unique), and billable insurance company or organisation.

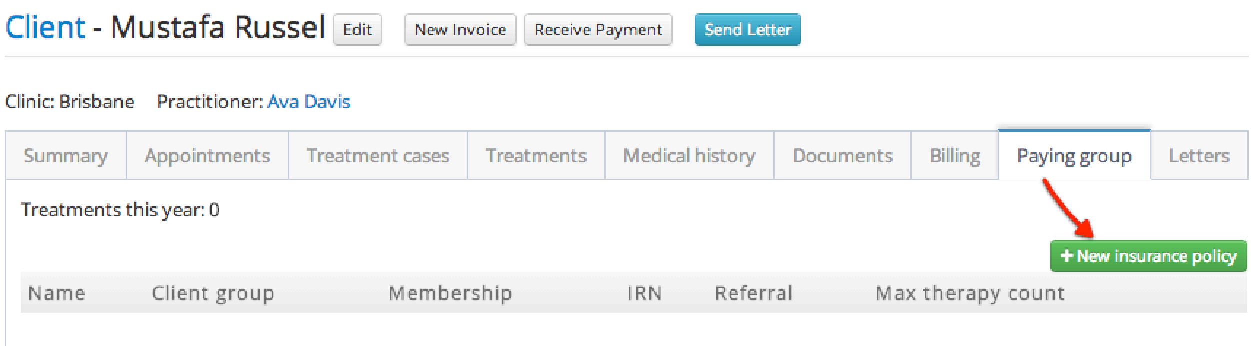


12.2 Assign Client Group to Client

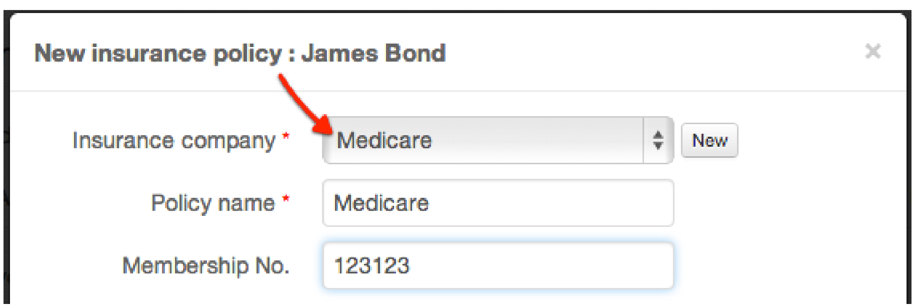
To assign a client group (exists already)



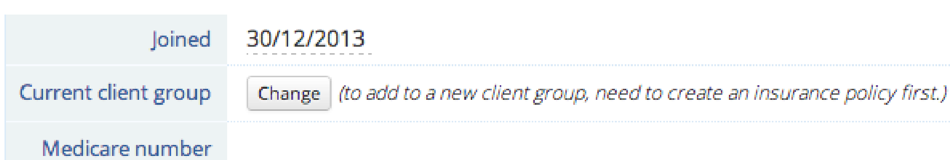
Find a client, select ‘Paying group’ tab



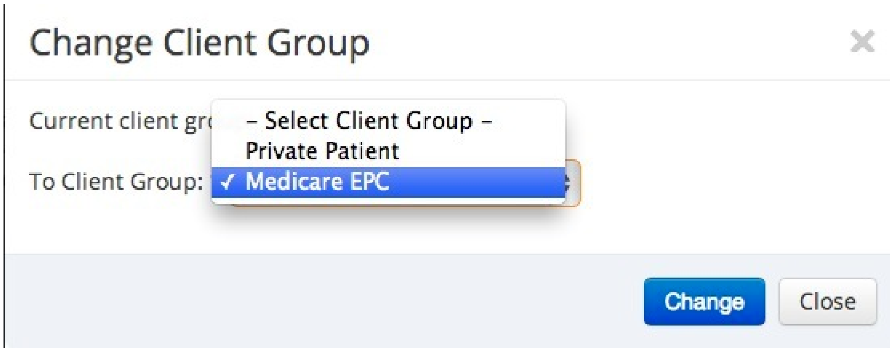
Add an insurance policy with the insurance company matching the client group’s ‘billable to’



Reload client record page, click ‘Change’ button

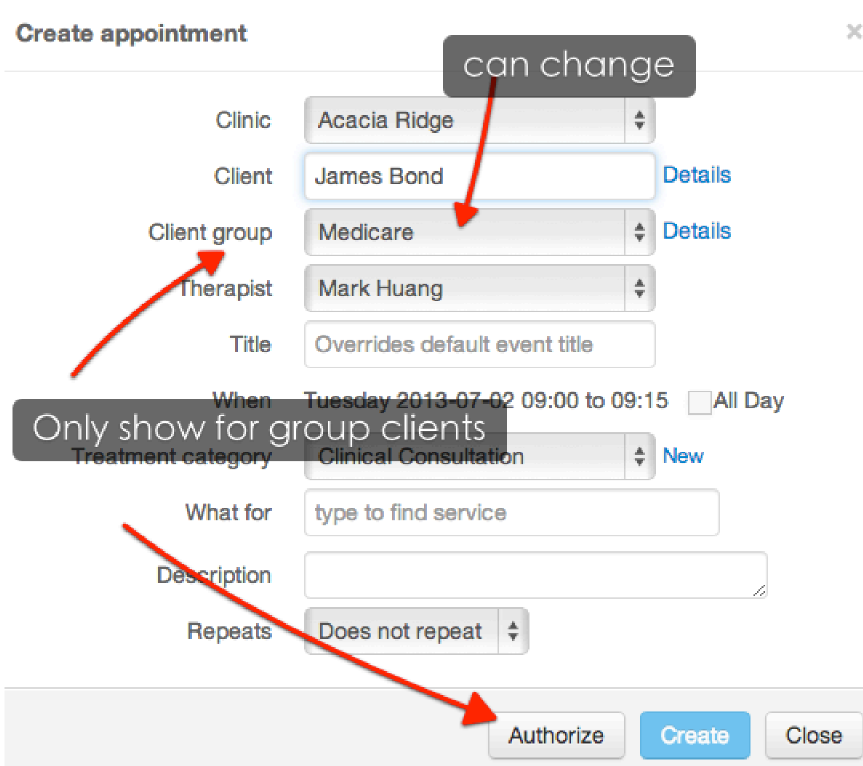


Select a new client group



12.3 Select Client Group on Appointment

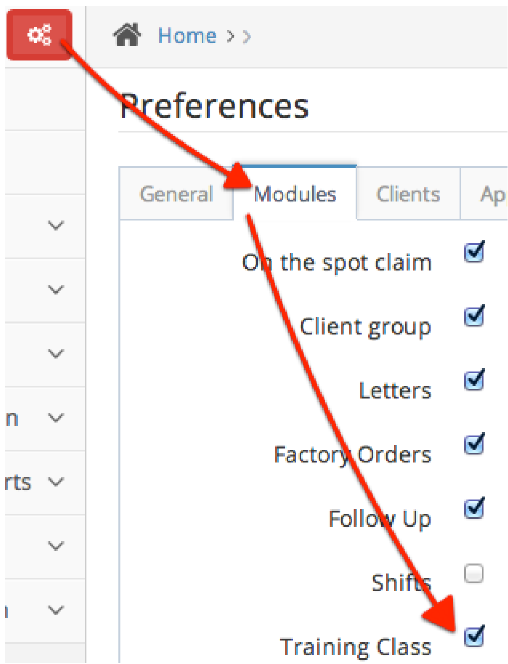
If a client is currently set to Non-Private-Patient, the system will show up client group option (which the reception can change to private patient), and an 'Authorise' button needs to be clicked to be able to create the appointment



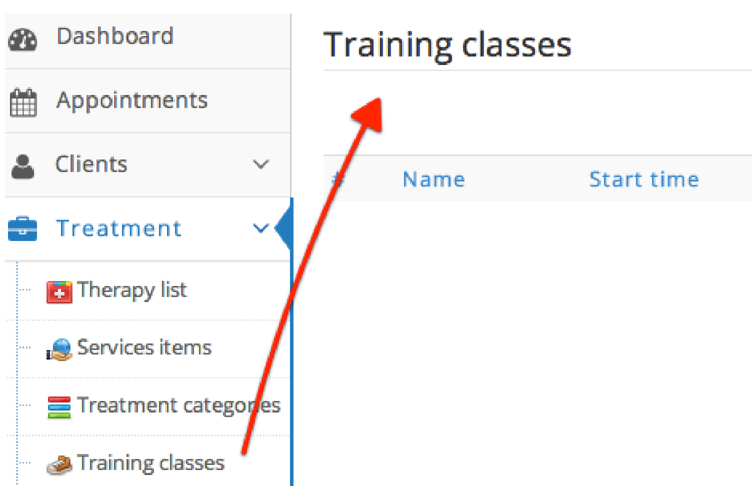
13 Training Classes

Training classes are specific to certain type of health clinics, such as pilate classes for physiotherapists.

To use this feature, firstly, enable it. Login as admin, enable 'Training Class' module.

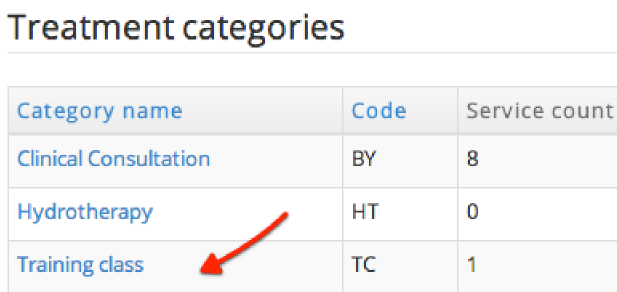


Access by the 'Training classes' menu on the left.

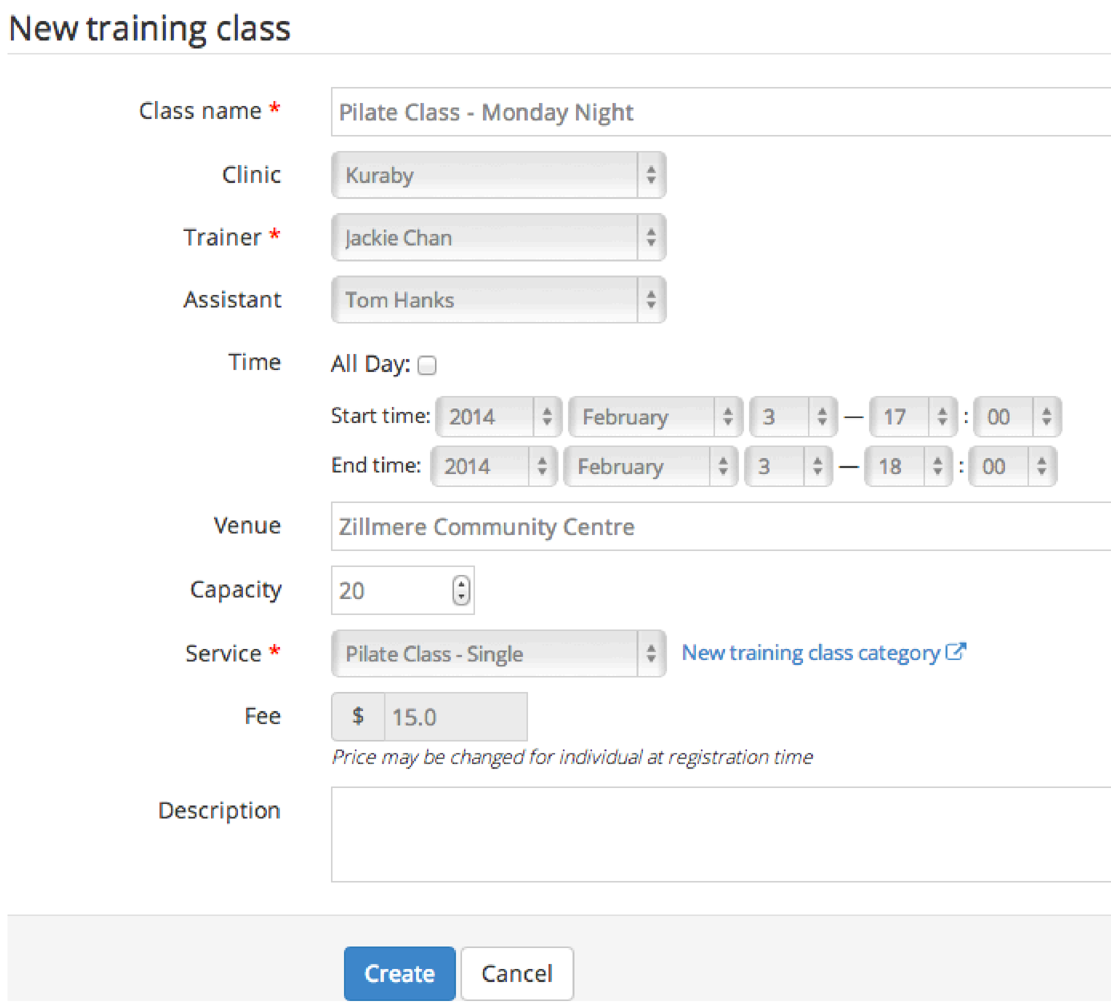


13.1 Create new Training Class

Before creating a training class, set up one or more service items under “Training class” treatment category (already defined in ClinicWise). For example, “Weekend Pilate Class”, “Pilate Class for Seniors”.

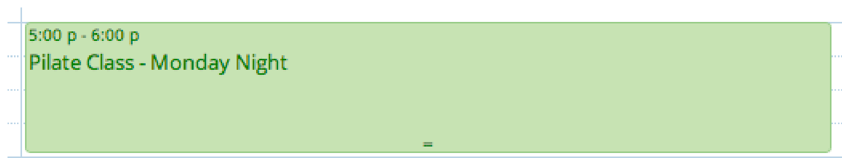


On creating a new class, must select the main trainer, who is a practitioner, and the service item.

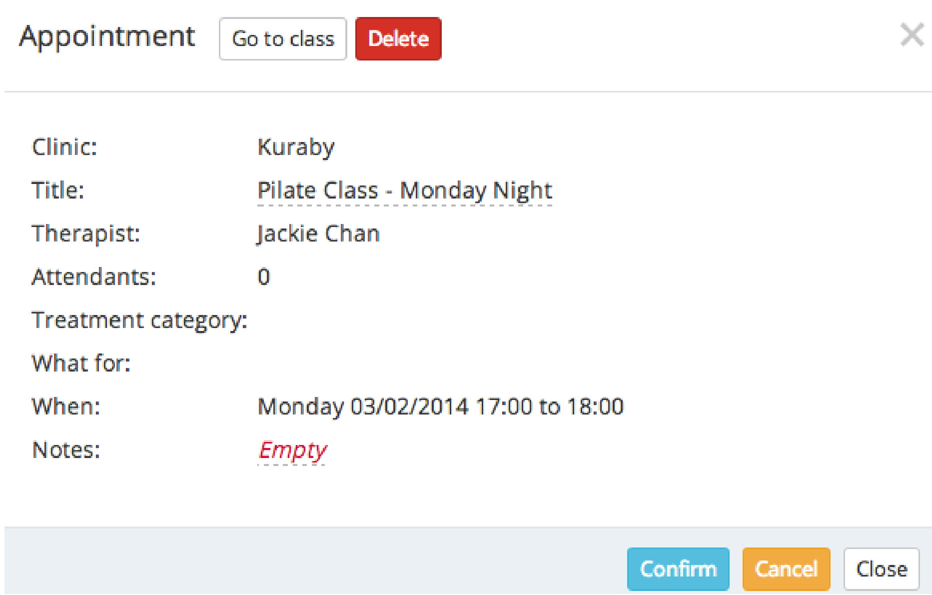


The below is a training class detail page.

ClinicWise will create an event note on diary.

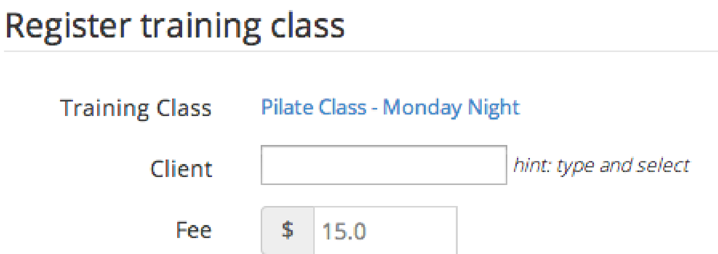


Open it from diary, you can go to the class.



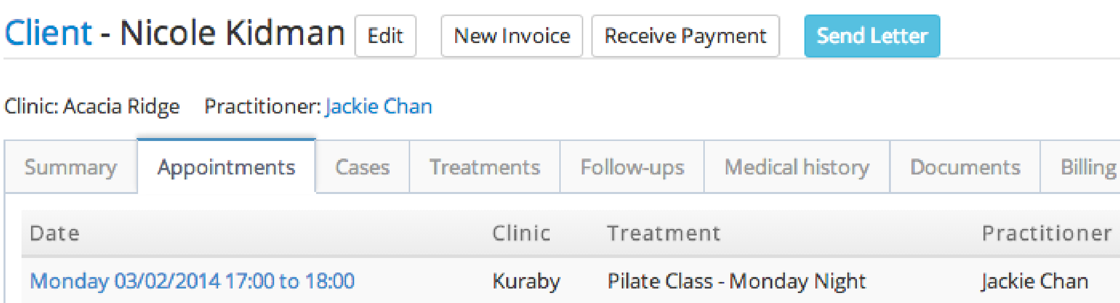
13.2 Register for Training Class

On the training class page, click 'Register client' button.



Type in and find a client, enter the price to charge (yes, the price can be changed here).

The registration may be deleted. The class will be shown in client records under 'Appointments' tab.



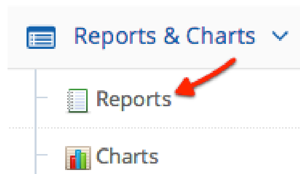
13.3 Complete Training Class and Charge Clients

Once the class is completed (double check the registrations), click 'Complete' button

The training class will marked as 'completed'. Receptionists can create invoices.

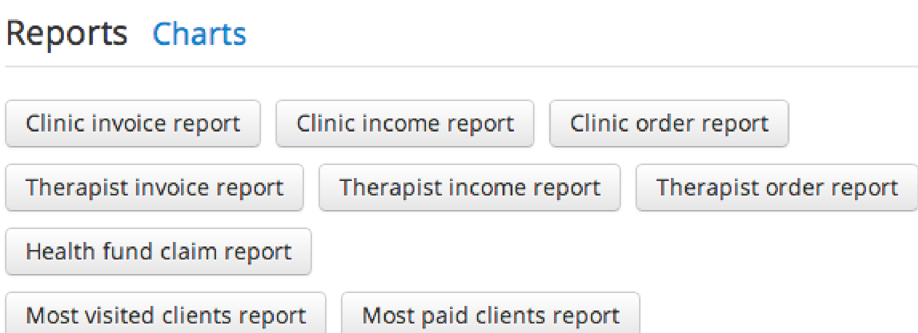
#	Date/time	Clinic	Status	Client	Therapy	Therapist	Price	Instruction	Comments	
6	2014-02-02 17:48	Kuraby	Not Charged	Bruce Lee			$0.00			Create Invoice
5	2014-02-02 17:48	Kuraby		James Bond			$12.50			Create Invoice Create Invoice and Accept Payment
4	2014-02-02 17:48	Kuraby	Uninvoiced	Nicole Kidman !			$15.00			Create Invoice Create Invoice and Accept Payment

14 Reports

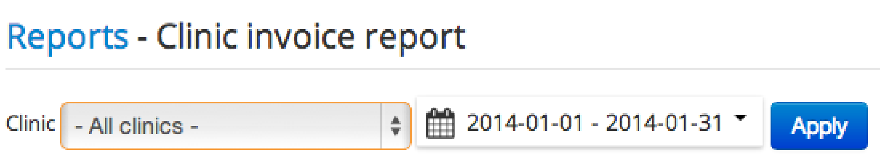


14.1 Clinic Reports (Admin Only)

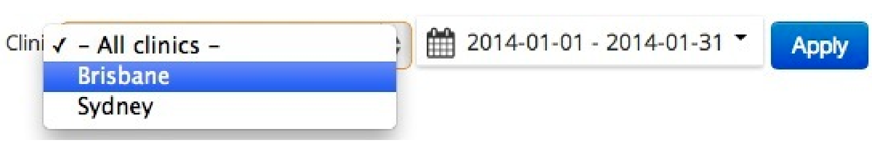
Click the ‘Reports’ menu, a list of available reports are displayed (more will be added).



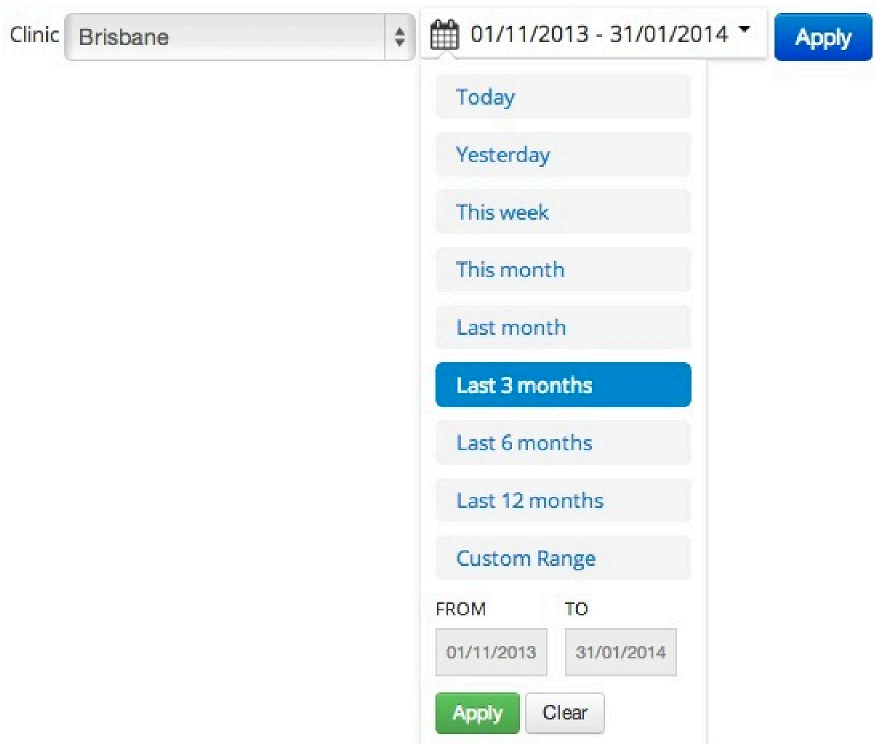
Click one report button,



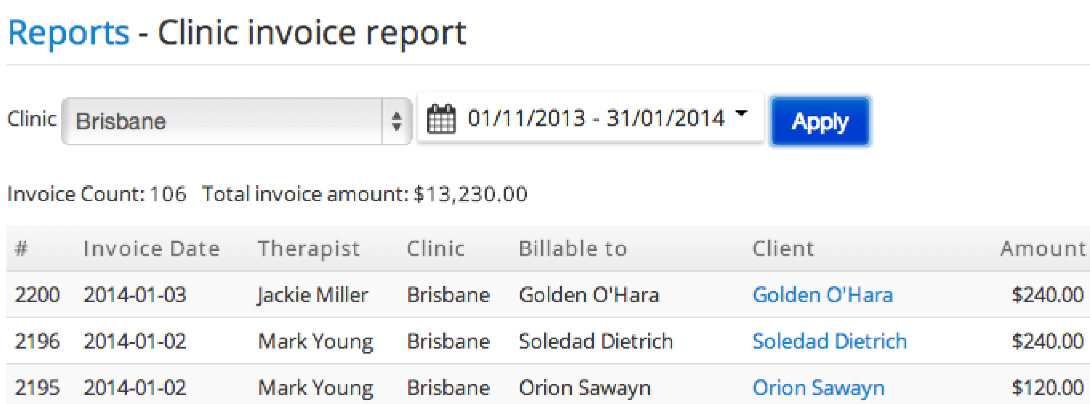
If you have more than one clinics, you may choose a report for all clinics or a specific one.



Then select a date range (default to current calendar month), a set of common date range are pre-defined there.



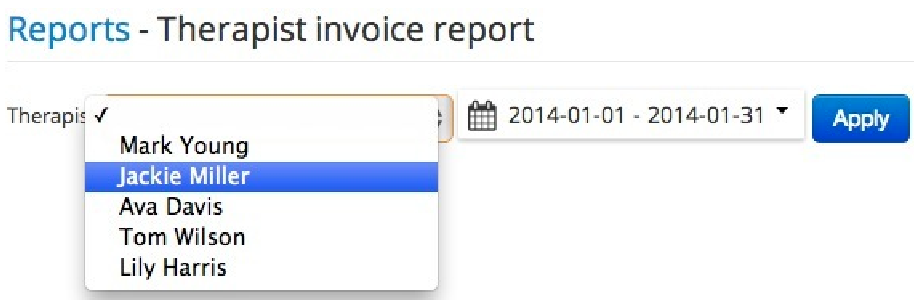
Click ‘Apply’ button to view your report.



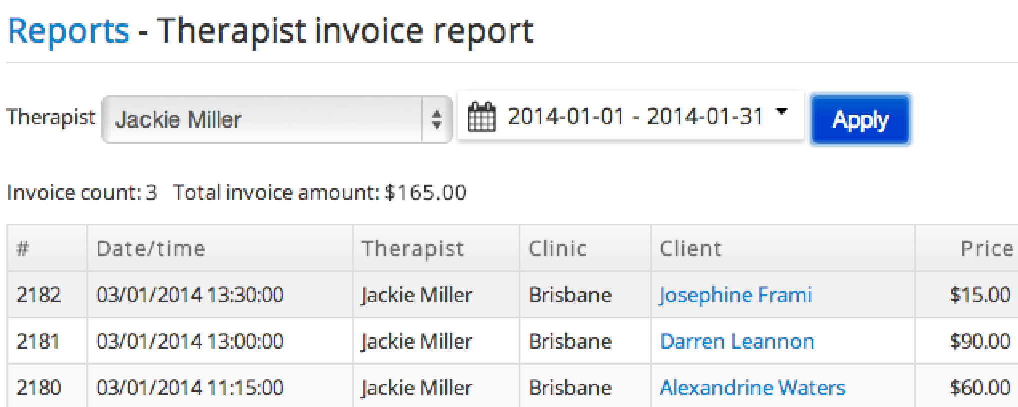
#	Invoice Date	Therapist	Clinic	Billable to	Client	Amount
2200	2014-01-03	Jackie Miller	Brisbane	Golden O'Hara	Golden O'Hara	$240.00
2196	2014-01-02	Mark Young	Brisbane	Soledad Dietrich	Soledad Dietrich	$240.00
2195	2014-01-02	Mark Young	Brisbane	Orion Sawayn	Orion Sawayn	$120.00

14.2 Practitioner Reports (Admin)

Often, a practitioner income or bonus is assoicated to the work the practitioner performed. The practitioner reports can get the information very easily.



Here is an example of one practitioner's monthly invoiced amount report

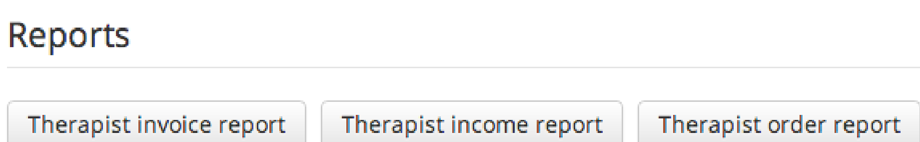


#	Date/time	Therapist	Clinic	Client	Price
2182	03/01/2014 13:30:00	Jackie Miller	Brisbane	Josephine Frami	$15.00
2181	03/01/2014 13:00:00	Jackie Miller	Brisbane	Darren Leannon	$90.00
2180	03/01/2014 11:15:00	Jackie Miller	Brisbane	Alexandrine Waters	$60.00

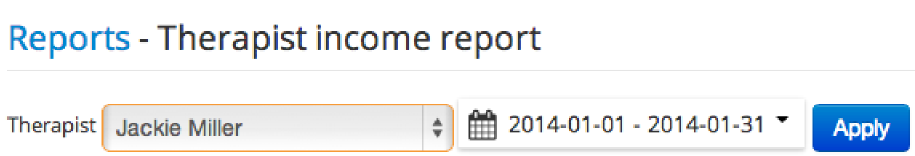
There are other reports such as 'most visited clients', 'Most paid clients', â€¦, etc.

14.3 Practitioner Reports

Practitioner can only see self reports.

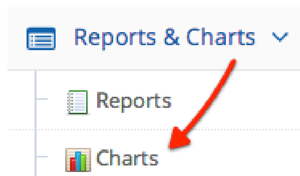


Example:

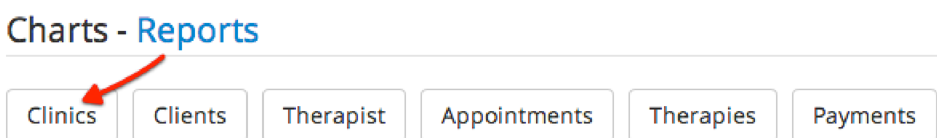


15 Charts

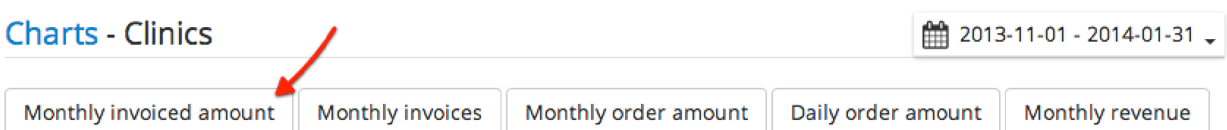
Only Admin User (default login: admin) can perform the following administration tasks .



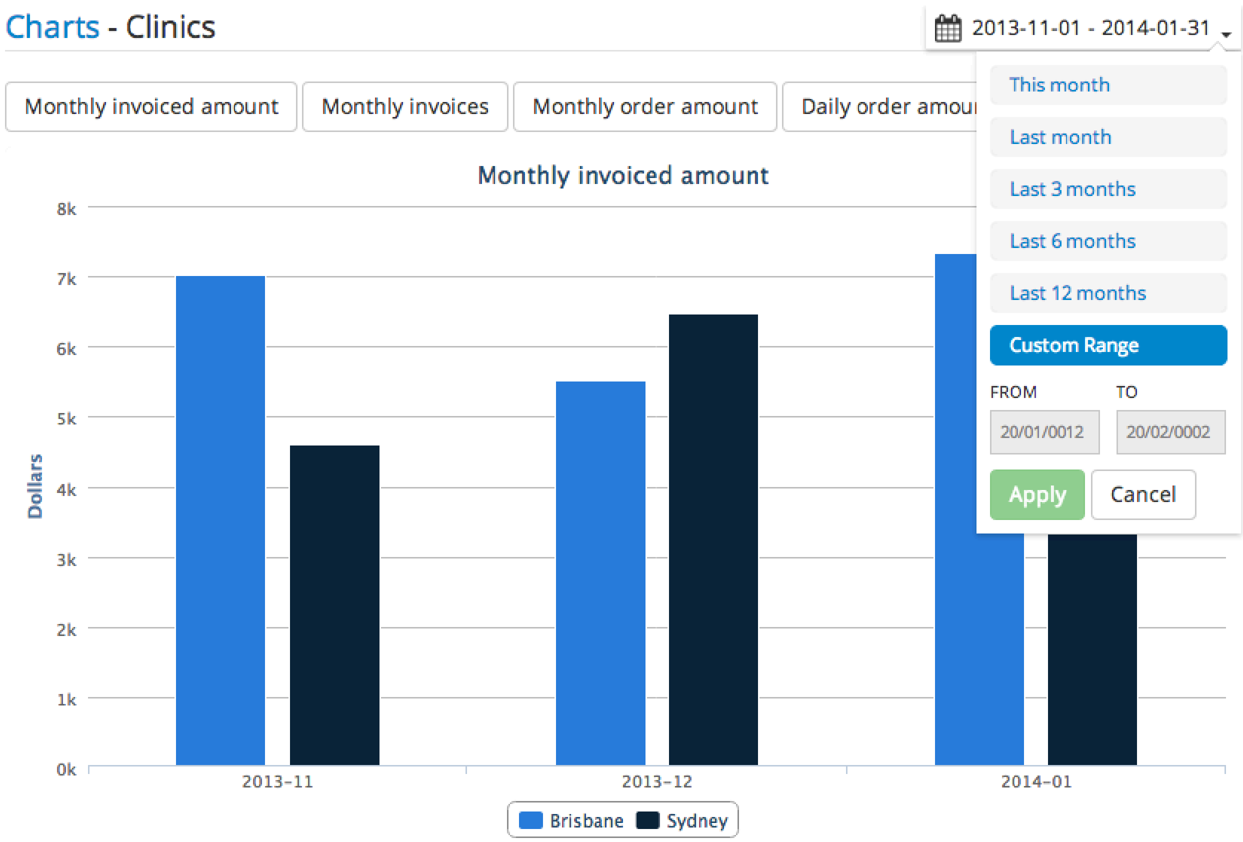
Click ‘Charts’ menu on the left, the top categories are displayed.



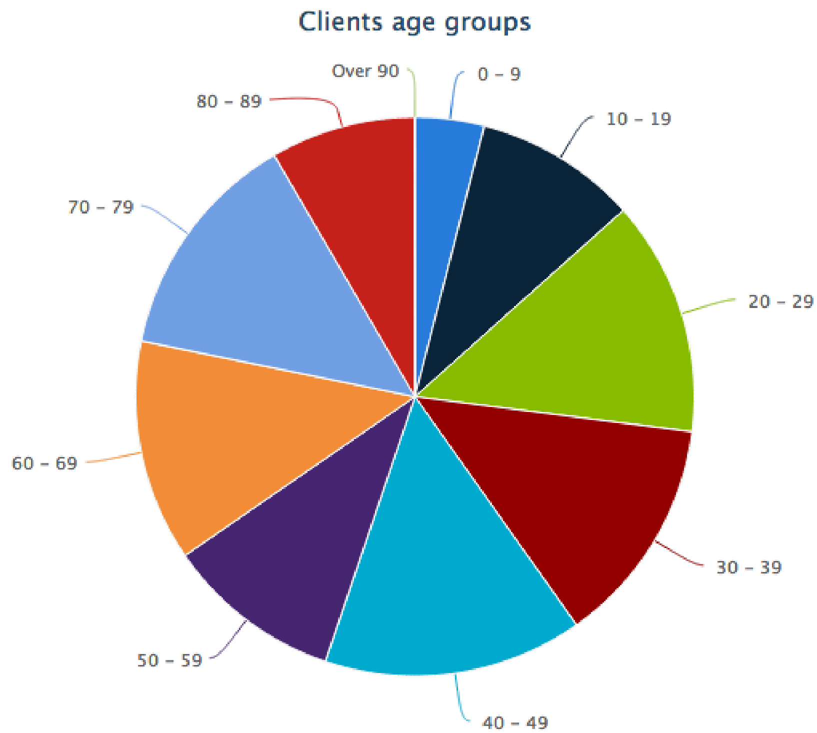
Within the category, click individual chart.



Then the chart is shown.

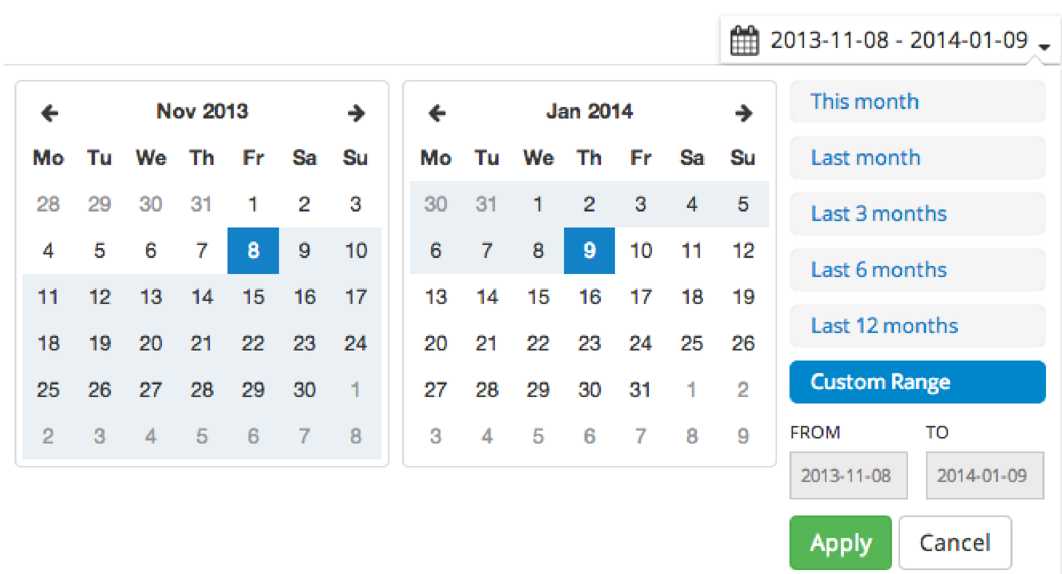


There are other types of charts, such as the one below.



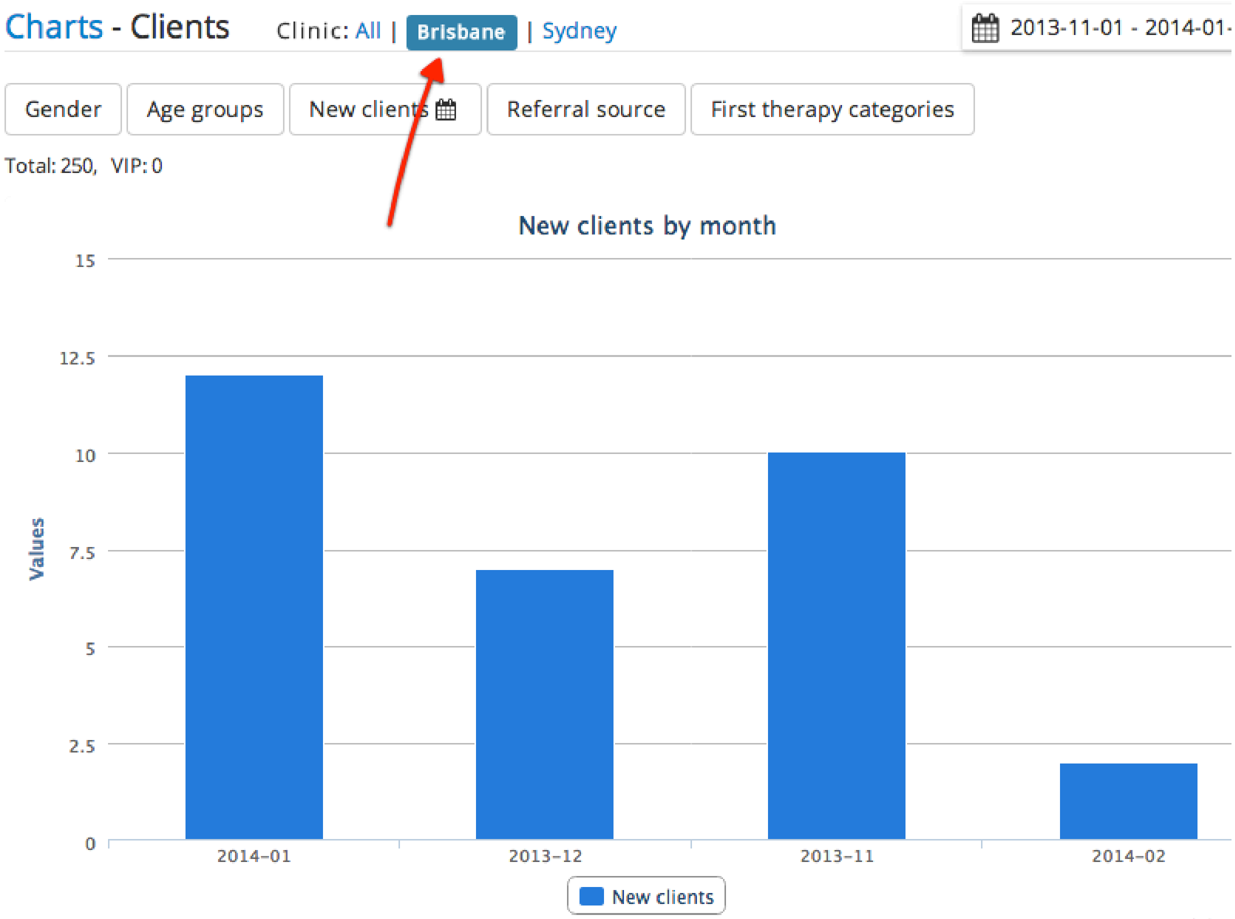
15.1 Narrow to custom date range

There are pre-defined date ranges: ‘This month’, ‘Last month’, ‘Last 3 months’, ‘Last 6 months’ and ‘Last 12 months’. You can also get a chart on specified date range.



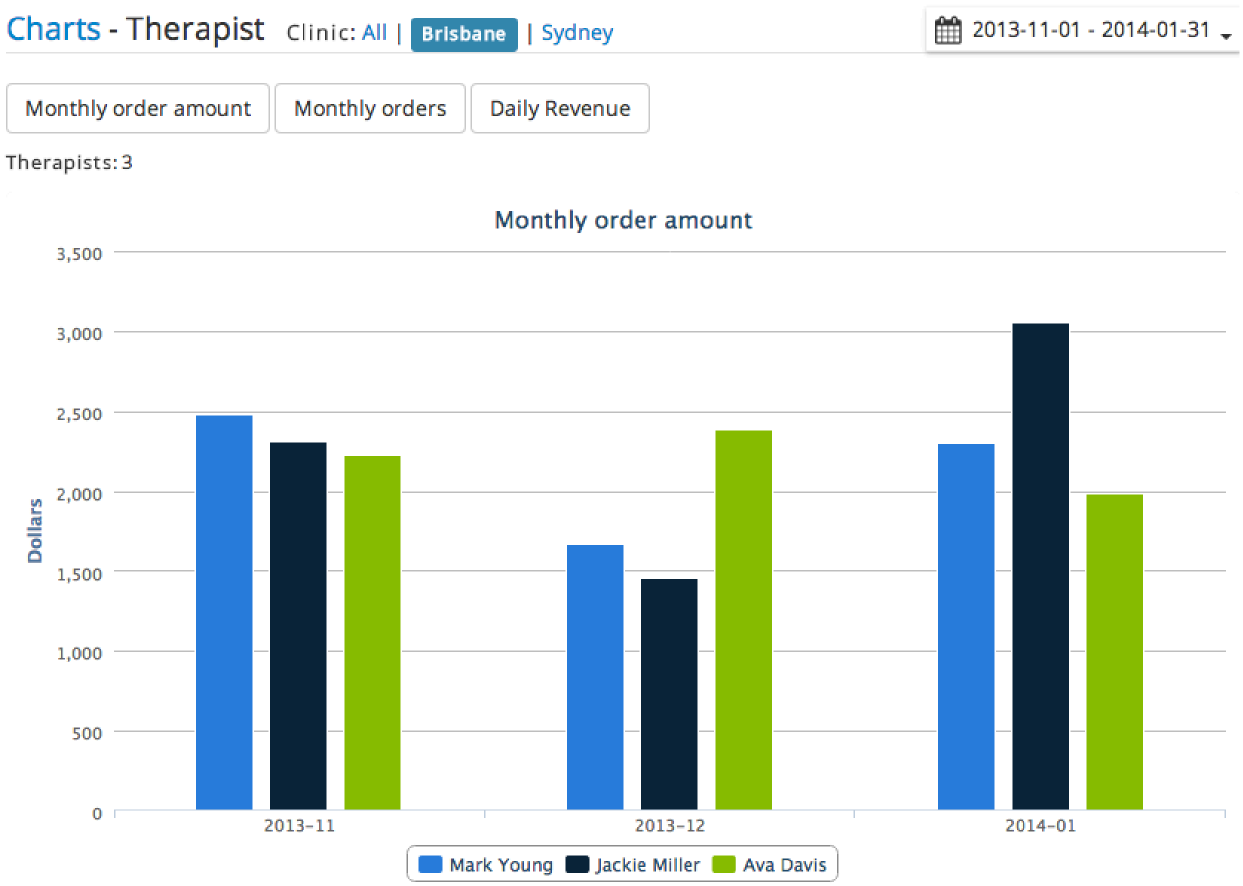
15.2 Narrow to specific clinic

By default, the charts on based on data from all clinics. You may also get charts on specific clinic.

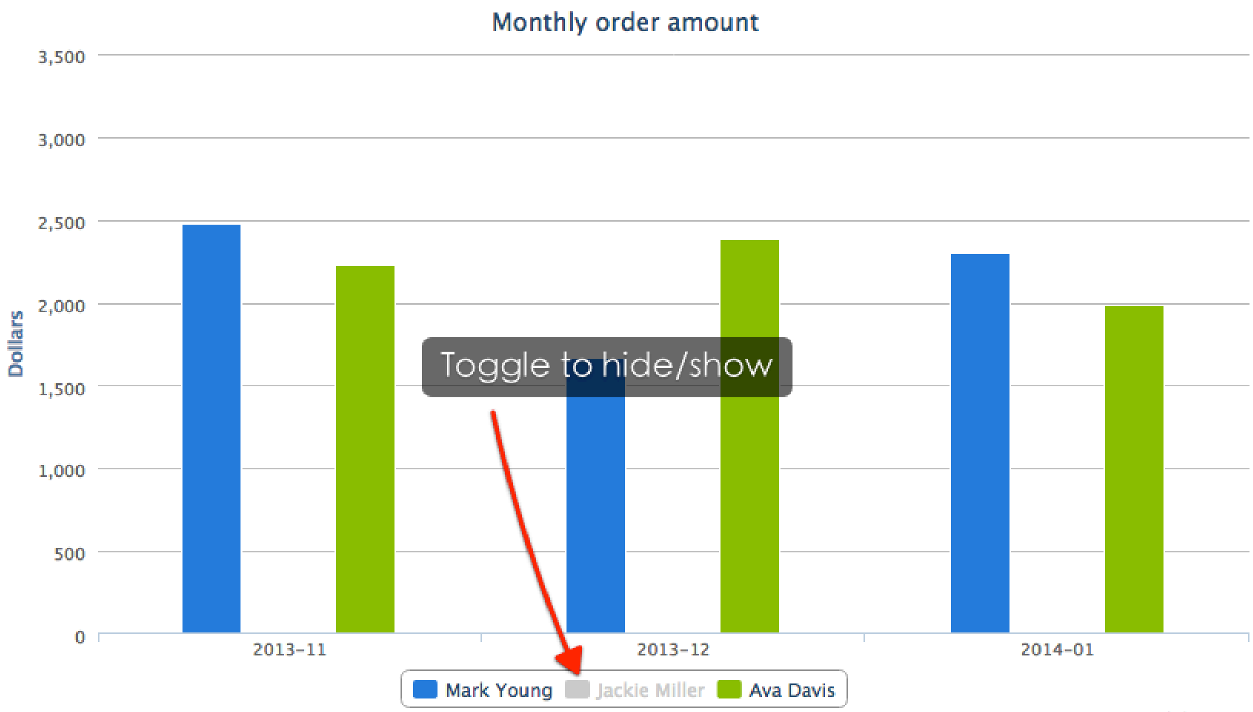


15.3 Toggle data item

On some charts, there are different date items shown. For example, the below is revenue generated from each practitioner by month.



Click one practitioner ‘Jackie Miller’, the second column is hidden.


Monthly order amount
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Dollars
Toggle to hide/show
2013-11
2013-12
2014-01
Mark Young
Jackie Miller
Ava Davis