ClinicWise User Guide

AgileWay 🟹

ClinicWise Manual

AgileWay Pty Ltd

©2014 AgileWay Pty Ltd

Contents

1	Initial Setup	. 1
	1.1 Update Business Information	. 1
	1.2 Add First Clinic	. 2
	1.3 Choose Receipt Format for Printing	. 2
	1.4 Core Settings	. 3
	1.5 Add Staff	4
2	Clients	6
	2.1 Find a client (or patient)	. 6
	2.2 Create new client	. 6
	2.3 Edit a client	. 7
	2.4 Upload pictures or media documents	. 9
	2.5 Change Private Health Fund	12
3	Appointments	13
U	3.1 Open Calendar	13
	3.2 Create New Appointment	15
	3.3 Block time slot	. 17
	3.4 Create recurring appointments	. 18
	3.5 Edit appointment	. 19
	3.6 Move appointment	21
	3.7 Change appointment duration	. 22
4	Treatments	23
т	/ 1 Prenare Treatment	24
	4.1 Trepare Treatment Notes	24
	4.3 Select Fee or Instruction to Pay	. 27
_		
5		. 30
	5.1 Create invoice from a treatment	. 30
	5.2 Apply Discounts	32
	5.5 Create invoice for selling products	34
	5.4 Direct invoice \ldots	36
	5.5 Create Invoice for Appointment	37

6	Acce	ept Payments	8
	6.1	Accept payment	68
	6.2	Private Health Fund Claim	39
	6.3	Part Payments	2
	6.4	Multiple Payment Methods	4
	6.5	Special Payment Notes	15
	6.6	Refunds	16
	6.7	Receive Payment without Invoice	6
7	Adm	inistration	-7
	7.1	Add Clinics	17
	7.2	Add Staff	8
	7.3	View Subscription	0
0	Satt		· •
0	0 1	V_{iouv} so this gap F_{iouv}	2 2
	ð.1		12
	8.2	Opdate settings	ιZ
9	Inte	rnal Communication	6
	9.1	Public/Internal Notices	6
	9.2	Internal Messaging	58
	9.3	System Notifications	60
	9.4	Contacts	60
10	Арр	ointment Reminders	52
	10.1	Enabling SMS Messaging	o2
	10.2	Add SMS Templates	53
	10.3	Send appointment SMS reminder to an individual client	5
	10.4	Set up Email template	6
	10.5	Send appointment Email reminder to an individual client	5 7
	10.6	Send reminders for all appointments in a day, by email or/and SMS 6	8
	10.7	SMS report	9
11	Lette	ers 7	1′1
	11 1	Manage Letter Templates 7	/1
	11.2	Create Letter	12
	11.2	Manage Letter Headers/Footers	16
	11.5	Send Letter by Email	16
	11.4	Concrete Letter in DDF	0 77
	11.3		1
12	Clie	nt Groups	9
	12.1	Create Client Group	'9
	12.2	Assign Client Group to Client	30
	12.3	Select Client Group on Appointment	31

CONTENTS

13 Training Classes	82
13.1 Create new Training Class	83
13.2 Register for Training Class	86
13.3 Complete Training Class and Charge Clients	86
14 Reports	88
14.1 Clinic Reports (Admin Only)	88
14.2 Practitioner Reports (Admin)	89
14.3 Practitioner Reports	90
15 Charts	91
15.1 Narrow to custom date range	93
15.2 Narrow to specific clinic	94
15.3 Toggle data item	94

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.

Step1	Step2	Step3	Step4	Step5	Step6					
Company information	New clinic	Receipt format	Core settings	Add Staff	Import data					
Company information										
Update your company details here.										
Company Name	Best Phys	io								
Logo	Choose File	No file chosen								
Time Zone	Sydney		\$							
Locale	en-AU 💲									
Address Line 1	4 Pivert D	rive								
Address Line 2	Sydney									
Phone										
Fax										
Email	bestphys	io@gmail.com								
Continue or skip this	s step									

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).

Step1	Step2	Step3	Step4	Step5	Step6
Company information	New clinic	Receipt format	Core settings	Add Staff	Import data
New Clinic					
A company may have more	than one clinics.	You can set up first o	one here and add m	ore later.	
Name *	Sydney				
Address Line 1	4 Pivert Stree	t			
Address Line 2	Sydney				
Phone	02 9848 4875				
Fax					
Email					
Appointment color	o o	• • •			

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.

Step1	Step2	Step3	Step4	Step5
Company information	New clinic	Receipt format	Core settings	Add Staff
Core settings				
Admin user edit these (and	more) settings a	ny time.		
Sales tax	□ Sales tax on s ✓ Sales tax on g	ervices oods		
Sales tax name	GST			
Sales tax rate	0.1			
Sale tax included in price?	2			
Health fund claim	✓ ★ New Health Feedback	und 🖸		

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"

New Staff

aff List						_
					Includ	es deleted New
Use	r name	Name	Staff number	Role	Email	
1 adm	nin	Admin Boss		Account Admin	bestphysio@clinicwise	e.net Edit
sydney						
licer n	ame	Nar	ne Staf	fnumber	Role	Fmail

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.

User name *:	mark
Staff number :	For sorting
Password :	****
Password again :	****
Email *:	mark@test.com
Title:	
Surname *:	James
First name :	
Initial/Preferred	
name.	
Role *:	Clinic: Sydney □ Clinic Admin

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

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)

Look up client 250 + New client								
Find in all clinics by	name or phone Search							
Name	Gender Client grou	p Age	Phone					
Jeff Gleason	Male	65	809.142.6563					
Norval Kohler	Female	9	(748)030-1724 x5359					

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

Anna	5	Search			
Name	Gender	Clien	t group	Age	Phone
Anna Hane	Male			49	1-262-710-0409 x634
Anna Sipes	Male			67	619.279.5294 x771
Arianna Stoltenberg	Female			50	(843)578-9101

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.

New client

Summary	Treatment case	25	
	Surname *		
	First name *		
	Gender *	OMale OFemale	
	VIP?		
	Birth date	e.g. 16/07/1985	
Med	icare number	IRN	can add other health fund later
	Photo	Choose File No file chosen	
	Phone *	mobile home	work

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.

Cli	Client - Arden Cremin Edit New Invoice Receive Payment Send Letter								
Clin	Clinic: Brisbane Practitioner: Not assigned								
Summary Appointments Treatment cases Treatments Medical history Documents									
Name		Arden Cremin Male							
		Birth date	15/08/1934 79 years old						
		Contact	S74-168-1045 ⊠ anya_pollich@cruickshank.info						
Address		9083 Hayes Neck, , Armstronghaven, QLD 42022							
Joined 30/12/2013			/12/2013						
Current client group									

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

Birth date	15/	08/1	934	79 <mark>y</mark>	ears	old		
Contact	C 07 44498944			8	×			
Birth date	15/0	8/19	34		~	×	79) years old
Contact	÷		Aug	ust 1	934		≯	@cruicksh
Address	Mo	Tu	We	Th	Fr	Sa	Su	ven, QLD
Joined	30	31	1	2	3	4	5	
Current client group	6	7	8	9	10	11	12	
Current client group	13	14	15	16	17	18	19	

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

Edit client - A	Arden Cremin
-----------------	--------------

Summary	Treatment cases	Medical history	Documents		
	Surname *	Cremin			
	First name *	Arden			
	Gender * 🛛 🧕	Male OFemale			
	Client group	Private Patient	\$	New	
	VIP?)			
	Birth date	15/08/1934			
Privat	e health fund	None	\$		
	Photo	Choose File No file o	hosen		
	Phone *	nobile	home	574-168-1045	work
	Email	anya_pollich@cruicl	kshank.info		
	Address	9083 Hayes Neck			

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 files \hat{e}_{l}^{l} ' button to select files.

Before upload	l, please make sure	the file name only contains: alpha, numbers and $_$
avatar_01.png		
avatar_02.p	Start upload	⊘ Cancel upload

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.

Private health fund	✓ None
	Medibank Private
Occupation	MBF
Referral source	Work Cover

After changed successfully, an indication is shown.



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

< :	Today	Tuesd	Month Week Day		
	Mark Young	Jackie Miller	Ava Davis	Tom Wilson	Lily Harris
All Day					
8am					
					8:30 a - 9:15 a 🔀
9am	9:00 a - 10:15 a 🛛 🔎				LH - Aron Moen - Clinical Co rs ultation

Week view

<	> Today	Jul 22 — 28 2013				Month	Week	Day
All Day	Mon 7/22	Tue 7/23	Wed 7/24	Thu 7/25	Fri 7/26	Sat 7/27	Sun 7	/28
8am								
9am	9:00 a - 10:00 a AD - Frederik	8:30 🛣 LH - 9:00 a - Aron MY - Euna	9:15 a - 9:45 a 🔊	9:00 a - 9:30a MV - 🕞 9:15 a - 9	9:00 a - <mark>9:00_a - J</mark> TW - Gail	9:00 a - ⁹ :00 ≱ . AD - TW		

Month view

< > To	oday		July 2013		Mon	th Week	Day
Mon	Tue	Wed	Thu	Fri	Sat	Sun	
1	2	3	4	5	6	5	7
9:00 a - 9:45 a JM - Merlin Jakubowski - Clinical	9:00 a - 9:30 ช JM - Mya Keebler - Clinical Consultation	9:00 a - 9:30 a LH - Naomie Ebert - Clinical Consultation	9:00 a - 9:30 a TW - Cassidy Blanda - Clinical Consultation	8:45 a - 9:30 a TW - Cordia Jacobs - Clinical Consultation	9:00 a - 9:15 JM - Dagmar Gutmann - Clinical		
Consultation 9:00 a - 9:30 a TW - Toy Kerluke - Clinical Consultation	9:30 a - 10:4 a TW - Kayla DuBuque - Clinical Consultation	9:45 a - 10:1 57 a TW - Blake Bednar - Clinical Consultation	9:00 a - 9:30 a JM - Cortney Nikolaus - Clinical Consultation	9:45 a - 10:30 a AD - Frederik Kertzmann - Clinical Consultation	Consultation		

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')

	Mark Young	Jackie Miller
All Day		
0		
8am		8:00 a - 8:45 a

A pop up window will show.

Clinic	Brisbane 🗘
Client	hint: type and select New client
Therapist	Jackie Miller 🗘
Title	Overrides default event title
When	Tuesday 2013-07-30 08:00 to 08:45 🛛 All Day
Treatment category	¢ New
What for	type to find service
Description	
Repeats	None 🗘

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

Clinic	Brisbane 🗘	
Client	john	New client
Therapist	Jayne Johnson 16/09/1996	
	Katheryn Johnson 13/05/1986	
Title	Alexa Johnston 04/05/1970	

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.

Treatment category	✓ Clinical Consultation	New
What for	Training class Hydrotherapy	

Type and select the service, what this appointment for.

What for	Initial consultation - Normal
Description	Initial consultation - Long 240.0
	Initial consultation - Normal 180.0
Repeats	Initial consultation - Short 120.0
	Initial consultation - Long 240.0
	Initial consultation - Normal 180.0
	Initial consultation - Short 120.0

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

	Mark Young	Jackie Miller
All Day		
8am		8:00 a - 8:45 a
		JM - Katheryn Johnson -
		Clinical Consultation :

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.

		aturday, jul 20, 2013	_
		Practitioner blocks out a time slot	
New appointment	Mark unavailable	After click, just need to select	
		practitioner and enter title.	
Clinic	Acacia Ridge	A V	
Therapist	Jackie Chan	\$	
Title	Overrides default e	vent title	
When	Saturday 2013-07-2	0 08:45 to 09:00 📄 All Day	
Description			
Repeats	Does not repe 💠		
		Create Close	

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.

New appointment	Mark unavailable	×
Clinic	Acacia Ridge 🗘	
VIP Client	Sam Hamilton Details	
Client group	Private Patient	
Therapist	Mark Huang	
Title	Overrides default event title	
When	Monday 03/02/2014 10:00 to 10:30 📄 All Day	
Treatment category	Clinical Consultation	
What for	Subsequent consultation - Normal Change	
Notes	[VIP]	7
Repeats	Weekly Repeat every 2 weeks 5 time	es
	Create	lose

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

Appointment - 2	Prepare treatment	Edit	Show in Calendar	Rebook	Delete -
Titler	an Hamilton Clini		aultation - Culture		Delete this
Title:	 2014-02-03 10:00 		isuitation : Subseq	uent cons	Delete future
	• 2014-02-17 10:00				Delete all
	• 2014-03-03 10:00				
	• 2014-03-17 10:00)			
	• 2014-03-31 10:00	1			

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.

Clinic:	Brisbane			
Title:	Allan Adams - Clinical Consultation Special	8	~	×

or

When:	Wednesday 01/01/2014 09:00 to 09:30			
Notes:	VIP	~	×	

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

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

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

Title	Allan Adams - Clinical Consultation Special
Clinic	Brisbane 💠
Therapist	Mark Young 🗘 🕞 Private
Client	Allan Adams (11) • New client
Treatment category	Clinical Consultation New treatment category
What for	B1102 Subsequent consultation - Normal
Time	All Day:
	Start time: 2014 🛊 January 💠 1 💠 — 09 💠 : 00 💠
	End time: 2014 🗘 January 💠 1 💠 09 💠 30 💠
Status	Confirmed \$

Cancel appointment

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

Appointment	- Details Edit Rebook Delete
Clinite	Distance
Clinic:	Brisbane
Title:	MY - Kelton Osinski - Clinical Consultation
Therapist:	Mark Young
Client:	Kelton Osinski
Treatment category:	Clinical Consultation
What for:	
When:	2013-11-07 14:00 to 14:30 (Thursday)
Notes:	
	Prepare treatment Confirm Cancel Not Attended Close

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

Appointment	Details Edit Rebook Delete	
Clinic	Brishane	
Title:	MY - Kelton Osinski - Clinical Consultation	
Therapist:	Mark Young	
Client:	Kelton Osinski	
Treatment category:	Clinical Consultation	
What for:		
When:	2013-11-07 14:00 to 14:30 (Thursday)	
Cancellation reason	Patient is sick	
Notes:		
	Cancel	

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.

Are you sure to move this appointment?		
	Cancel	

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 below:

1. Appointment (recommended)

Appointmen	L _ Details Edit Rebook Delete	¢
Clinic: Title:	Brisbane MY - Magali Gutkowski - Clinical Consultation	
Client: Treatment category:	Magali Gutkowski Clinical Consultation	
What for: When: Notes:	Thursday 02/01/2014 09:00 to 09:45 Empty	
	Prepare treatment Confirm Cancel Not Attended Close	•

2. Client record



3. Dashboard

Dashboard Clinic Admin Therapist



Treatments

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.

Prepare ti	reatment
------------	----------

Clinic	Brisbane 🗘
Therapist	Mark Young
Client *	Elena Hermann V (Initial consultation)
Client group	Private Patient + New
Treatment case *	- Select a treatment case or create new -
Treatment category	Clinical Consultation
What for	type to find service item
Comments	
	Start therapy Cancel

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.

New treatment case : Elena Hermann							
Title #							
Inde "	New Case: back pain						
Chief complaint							
2		_//					
Present medical							
nistory		_//					
Examination							
		11					
Diagnosis							
t		11					
Treatment advice							

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.

Treatment case *	New Case: back pain + New
Treatment category	Clinical Consultation
What for	in 🖌
Comments	Initial consultation - Long 240.0
	Initial consultation - Normal 180.0
	Initial consultation - Short 120.0
	Pilate Class - Single 15.0

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.

Treatment - 711

Therapist: Mark Young	Patient: Alisa D'Amore	Treatment case: Back Pain	Category:
Start time: 31/01/2014 20:36	Comments:		
C Treatment notes			🗁 Previous treatment notes
Subjective examination			mport
A • Ti • B I S		D C (• - + - ·	Stretch Leg, ITB and Lat Q release.
Objective examination			
$\mathbf{A} \bullet \mathbf{T}! \bullet \mathbf{B} \mathbf{I} \mathbf{S}$		D C 0 - +	
Treatment			
A • T! • B I \$		D C	
t⊐ Next visit			
No Need 🗘 Nex	t visit notes		
Save Save and finalize	Finish therapy		

Format text

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



Treatments

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.

Determine Fee		×
Your cart \$180.00 1× Initial consultation - Normal	Total:	\$180.00 🖓 🗙 \$180.00
Billing code: init	Manual enter f	ee Empty Cart
Code Service name	Fee	Quantity
B1001 Initial consultation - Long	\$240.00	1 \$ Add
B1002 Initial consultation - Normal	\$180.00	1 \$ Add
B1003 Initial consultation - Short	\$120.00	1 \$ Add
S1001 Initial consultation - Long	\$240.00	1 💲 Add
S1002 Initial consultation - Normal	\$180.00	1 \$ Add
S1003 Initial consultation - Short	\$120.00	1 ‡ Add
Enter instruction to recentionists for billing		
Enter instruction to receptionists for billing		Finish

or

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

Treatments

Complete Treatment

Client	Alisa D'Amore	
Service item	B1002 Initial consultation - Normal \$180.00	
Give 5% VIP discour	nt	
		1.
	Finis	n

Either way, receptionists can create an invoice for it.

 \times

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.

Тос	Today completed therapies Unpaid invoices Unbilled orders									
#	Date/time	Clinic	Status	Client	Therapy	Therapist	Price	Instruction	Comments	
712	2014-02-01 09:17	Brisbane	Not Charged	Ralph Heller	715 (Clinical Consultation)	Mark Young	\$0.00	free	Next visit: No Need	Create Invoice
711	2014-02-01 09:15	Brisbane		Tyrese Von !	713 (Hydrotherapy)	Mark Young	\$180.00		Next visit: No Need	Create Invoice Create Invoice and Accept Payment

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

Invoicing

New Invoice

Therapist: Mark Young	Patient: Tyrese Von Treatment: #	713 (B1002 : Initia	l consultation -	Normal)					
Instruction To Receptionist									
Products and services	Add / change fees	Add extra	ı billing ite	ems					
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			
Total Amount : \$180.00 GST Amount : \$0.00 Amount Now Due : \$180.00 Enter invoice comments here Just create an invoice with listed billing item Create Invoice Cancel									

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:

Customer Invoice Not Paid Ed	it Delete Invoice No.: #711 Invoice Date: 01/02/2014 ⊕ Print ≅ Email ∰ Book next appointment
Wise Physio	
ABN : 61 123 456 789	Client: Tyrese Von
128 Wallaby Way	
Sydney	
Phone: 07 3000 4000	
Email:physio@clinicwise.net	

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 : \$260.00

5.2 Apply Discounts

You can apply two types of discounts:

• Individual billing item discount

Your cart \$192.00		
1× Initial consultation - Long		\$240.00 🖓 🗙
	20% off	-\$48.00
	Total:	\$192.00
Apply discount to: 1× Initial consultation -	Long \$240.0	📕 X
Discount percentage: 20% • 48	Overwrite	Apply 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.

🥖 Custom	Delete Not Paid Edit Delete			Invoice No Invoice Da	o.: #712 ate: 01/0	2/2014
		🔒 Pri	nt 🔁 Email	📸 Book	next app	ointment
	Wise Physio					
ABN : 61 123 456	5 789	lient: Ralph Hell	er			
128 Wallaby Wag	y					
Sydney						
Phone: 07 3000	0 4000					
Email:physio@	clinicwise.net					
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.

🃜 Stock	~
💮 🛄 Sell pro	ducts

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

Sell products 💿

Discount: C	hoose 🔻			Check out	Empty	Cart		
		Search						
Name	Category	Code	Brand	Quantity	Unit	Manufacturer	Price	
Foam Roller		PFR001		1	0		\$40.00	3 Add

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

Sell products			
Your cart \$94.50			
3× Foam Roller			\$120.00 🖓 🗙
	15% off overwrite with amou	nt	-\$15.00
Discount 10%			-\$10.50 🗙
	Tota	al:	\$94.50
Discount: 10%	•		
		Check out	Empty Cart

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).

Check out

Products and services

3× Foam Roller Discount 10%	15% off overwrite with amount	\$120.00 -\$15.00 -\$10.50
	Total:	\$94.50
Client: Maribel Osinski (74	4) • (or Enter manually)	
Confirm Cancel		

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

Date	Description	ltem 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)

Preferences

	General	Modules	Clients	Appointments	Treatment	Pricing	Payments
Use paid tax invoice as receipt?			oice as eceipt?	₫			
	Refund	authoizatio	n code				
	Allow acce	pt payment trea	before tment?	J 🔶			

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

Appointment	Details Edit Reminder Rebook Delete X
Clinic:	Brisbane
Title:	Aurore Leuschke - Clinical Consultation
Therapist:	Mark Young
Client:	Aurore Leuschke
Treatment catego	ory: Clinical Consultation
What for:	Initial consultation - Short
When:	Saturday 01/02/2014 15:15 to 16:15
Notes:	Empty
	Create Invoice Confirm Cancel Not Attended Close

Click the invoice button to start the invoice creation process.

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).

		Total Amount : \$196.65 GST Amount : \$0.00
 Payment Info 	On the spot claim (No private health fund)	Amount Now Due : \$196.65
Payable amount:	\$196.65	
Payment amount: *	\$ 196.65	
Pay with: *	Cheque \$	
Comments:		
		//
	Accept Payment Cancel	

Here is a sample fully paid invoice.

Customer Invoice Fully Paid					Invoice No.: #712 Invoice Date: 01/02/2014				
					🔒 Pri	nt 🔁 Email	🛗 Book	next app	pintment
	Wise Phys	io							
 ABN : 61 123 456 128 Wallaby Way Sydney Phone : 07 3000 Email : physio@ 	789 9 4000 clinicwise.ne	÷t	• (Client: Ral	ph Hell	er			
Date	Description			ltem	price	Quantity	Ex GST	GST	Total
01/02/2014 16:06	Initial consult	tation - Long	(20% off: -\$48.00)	\$2	240.00	1	\$192.00	\$0.00	\$192.00
01/02/2014 16:06	Pilate Class - S	Single		\$	15.00	1	\$15.00	\$0.00	\$15.00
01/02/2014 16:06	Discount 5%							\$0.00	-\$10.35
Payment Info						То	tal Amo GST Amount N	unt : \$ Amour Now Du	196.65 ht:\$0.00 e:\$0.00
Payment Date	R	ef Paic	i by	Paymer	nt met	hod			Amount
)1/02/2014 17:20	71	11 Ralp	h Heller				Cheque		\$196.65
						Тс	otal Pay	ments	: \$196.6

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.

On the spot claim - 1					
Client	Nicole Kidman				
Invoice Total Price	\$600.00				
Health fund *	* New				
Service	Initial consultation - Long				
Amount *	\$				
Fund reference					
	*				
	Claim Close				
	On the spot claim (No private health fund)				

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

Payment Info				
	On the spot claim	an do mi	ultiple claims	
Claims	# Date/time	Invoice	Health fund	Amount
	1 2014-02-01 17:49:06	1	Medibank Private	\$100.00 Delete
the amount is co automatically a	2 2014-02-01 17:49:25 alculated fter claim	1	MBF	\$48.65 Delete
Payable amount:	\$451.35			
Payment amount: *	\$ 451.35			

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 recuncilations with health funds.

🚯 Dashboar	ď	Hea	Health fund claims						
🛗 Appointm	ients	Def	Clinia	Claim Time	Lingth fund	Client	Investore #	Devenent #	A
Lients	~	2 Ret		2014-02-01 17:49:06	Medibank Private	Nicole Kidman	1	3	\$100.00
💼 Treatmen	t v	3	7	2014-02-01 17:49:25	MBF	Nicole Kidman	1	3	\$48.65
📜 Stock	~								
🙊 Communi	cation 🗸								
🔳 Reports &	Charts 🗸	/						•	
Payment	s 🗸	/							
📄 Invoices									
💮 🏐 Payment	ts								
🖉 👗 Health fu	und claims								

6.3 Part Payments

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

Payment Info		
	On the spot claim	(No private health fund)
Payable amount:	\$260.00	
Payment amount: *	\$ 100	
Pay with: *	Cash	*

On the invoice, the status is now Partly Paid'



Email:physio@clinicwise.net

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'

Customer Invoice Fully Paid

Invoice No.: #711 Invoice Date: 01/02/2014

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 Paymen	ts : \$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.

Payment accepted successfully, you may take another payment for this order on the same receipt. DO NOT REFRESH!

Then may take another payment with a different payment method

Payment Info				
Payment Date	Ref	Paid by	Payment method	Amount
01/02/2014 18:00	3	Nicole Kidman	just processe	Cheque \$210.00
	On t	he spot claim	To No private health fund)	tal Payments : \$210.00
Payable amount:	\$390.0	00		
Receipt:	#10000) for \$210.00		
Payment amount: *	\$ 3	390		
Pay with: *	Bank	Transfer	different paym	ent method
Comments:		/		1
	Acce	ept Payment	Cancel	

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

Payment details #3: \$210.00 , #4: \$390.00						
Payment Date	Ref	Paid by	Payment method		Amount	
01/02/2014 18:00	3	Nicole Kidman		Cheque	\$210.00	
01/02/2014 18:01	4	Nicole Kidman		Bank Transfer	\$390.00	

Total Payments : \$600.00

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.

Payable amount:	\$3,000.00	
Payment amount: *	\$ 3000	/
Pay with: *	Cash	\$
Comments:	Foreign tourist.	received US\$2800 for A\$3000 treatment

This the payment record afterwards.

Payment - 3 Edit Delete
Clinic Associa Dideo
CINIC: Acacia Ridge
Invoice : #3 (01/02/2014)
Receipt : #10000
Amount: \$3,000.00
Payment method: Cash
Payer: Jeremy Lin
Cashier: Natalie Portman
Received payment at: 01/02/2014 17:40:16
Notes: Foreign tourist. received US\$2800 for A\$3000 treatment

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.

Melbourne	
20 South Bank Blvd	
0 0 0 0 0	
Create Cancel	
	Melbourne 20 South Bank Blvd

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.

New	Staff
-----	-------

User name *:	james				
Staff number :	010				
Password :	•••••				
Password again :	•••••				
Email *:	james@wisephysio.net				
Title:					
Surname *:	Bond				
First name :	James				
Initial/Preferred name :					
Role *:	Clinic: Brisbane Clinic Admin Practitioner	✓ Reception	☐ Matron	□ Nurse	Assistant
	Clinic: Sydney	✓ Reception	Matron	□ Nurse	Assistant

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.

Brisb	bane			
	User name	Name	Staff number	Role
1	mark	Mark Young	001	Clinic Admin Practitioner
1	jackie	Jackie Miller	002	Practitioner
1	ava	Ava Davis	003	Practitioner
1	sharon	Sharon Lee	007	Nurse
1	natalie	Natalie Parker	009	Reception
1	james	James Bond	010	Clinic Admin Practitioner Reception
Sydn	iey			
Sydn	ley User name	Name	Staff number	Role
Sydn	User name	Name Tom Wilson	Staff number 005	Role Clinic Admin Practitioner
Sydn	User name tom lily	Name Tom Wilson Lily Harris	Staff number 005 006	Role Clinic Admin Practitioner Practitioner
Sydn 1 1 1	User name tom lily sophia	Name Tom Wilson Lily Harris Sophia Evans	Staff number 005 006 010	Role Clinic Admin Practitioner Practitioner Reception

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 Site¹).

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

Company Manag	gement			\mathbf{X}
Start configuring	Clinics	Export data	Import data	ClinicWise Subscription

to view your current usage and subscription details.

¹https://clinicwise.net/app/sign_in



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.

Preferences

General	Modules	Clients	Appointments	Treatment	Pricing	Payments	Reference data	Data control
	Practitioner	called as	Practitioner					

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

New Notice

Header *	Annual Xmas Party tomorrow
Body	No appointments in the afternoon.
la public potico?	Public notice is visible to public, viewable without need to sign in
is public notice?	- Able Hotee is Asial to public, Hemble Malout heed to Signific
Severity	Normal
Active?	
Clinic	All clinics
Start time	2014 \$ January \$ 4 \$ - 19 \$: 48 \$
End time	2014 \$ January \$ 5 \$ - 19 \$:48 \$
	Create

- 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.

Internal Communication



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

Dashboard Clinic Admin Therapist	
Internal notices (1)	
Public Notice #2 Don't enter real customer data in this demo site !	2014-01-04 19:45

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.

2	Communication	~
-	🔔 Notices	/
-	🖂 Messages 🖌	

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

Messages New message		
This clinic		Other clinics
Jackie Miller (Brisbane)	2014-01-04 20:06	Tom Wilson (Sydney)
OK.		Lily Harris (Sydney)
Ava Davis (Brisbane)	2014-01-04 20:08	Sophia Evans (Sydney)
don't have to come to the office	is cancelled, you	
Sharon Lee (Brisbane)		
Natalie Parker (Brisbane)		

Click a colleague name to send a message.

Message - Mark Young

2	Mark Young Can you find a recent X-ray for client 'James Bond'?	2014-01-04 20	0:05:53
Me OK.		2014-01-04 20:06:47	2
Enter your n	nessage		
		Send Ca	ancel

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 appointments¹). 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 Nexmo², 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.

²"http://nexmo.com/"

¹"http://www.biomedcentral.com/1472-6963/13/125"

\$	\$	1	Home >>					
			Prefere	ences				
			General	Modules	Clients	Appo	ointments	Trea
	~			On the spo	ot claim			
	~			Clien	t group	Ø		
	~				Letters			
n	~			Factory	Orders			
ts	Ň			Fol	llow Up			
	Ň				Shifts			
	~			Trainin	g Class	Ø		
				SMS Mes	ssaging	SN 🗹	/IS credits:	10

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.

SMS templates			
		New SMS Ter	mplate
Template name	Category	Content	
Appointment reminder	reminder	Hi {{Client.FirstName}}, Confirming your appt at {{Clinic.Name}} {{Appointment.DayOfWeek}} {{Appointment.Date}}@{{Appointment.Time(am/pm)}}. Pls call {{Clinic.Phone}} if need reschedule. {{Business.Name}}	Edit

You may add a new one or edit an existing one

Standard SMS message is up to 140 characters. Messages over 140 characters will be truncated and sent across multiple messages, i.e., cost more credits. So be concise if possible.

Template	Appointment reminder VIP
Related to	Appointment
Content	Add - Client - + - Appointment - + - Business - +
Example	Hi {{Client.FirstName}}, Confirming your appt at {{Clinic.Name}} {{Appointment.DayOfWeek}} {{Appointment.Date}}@{{Appointment.Time(am/pm)}}. Any change PIs call {{Clinic.Phone}}. {{Business.Name}}
À	<i>Hi {{Client.FirstName}}, Confirming your appt at {{Clinic.Name}} {{Appointment.DayOfWeek}} {{Appointment.Date}}@{{Appointment.Time(am/pm)}}. Any change Pls call {{Clinic.Phone}}. {{Business.Name}}</i>
Description	

During editing, you may use dynamic data fields. For example, Select "-Appointment -" -> "Appointment's practitioner".

Content	Add - Client -	🛊 🗸 – Appointment –	- Business -	÷
Evample	Appointment's practitioner			
Example		Appointment date of week		
		Appointment date		
		Appointment time		

The system will insert the below into the template content:

```
1 {{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.

Appointment C	onfirmed Details Edit Reminder Rebook Delete X
Clinic:	Brisbane
Title:	Norene Walker - Clinical Consultation
Therapist:	Mark Young
Client:	Norene Walker
Treatment category	: Clinical Consultation
What for:	Initial consultation - Short
When:	Friday 24/01/2014 09:45 to 10:15
Notes:	Empty

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

Send reminder

Appointment: 24/01/2014 09:45 - 10:15 Show in Calendar
Client: Norene Walker 🛛 0412900600 💪 1-832-150-8950 🔤 stuart@ledner.biz
10 SMS credits remaining.
SMS Template: 🔶 Edit 🖸
It is highly recommended to preview the messages first, messages with 140 characters might cost more SMS credits.
Email Template: 🗧 🗧 Edit 🗷
Send SMS Send Email Send SMS and Email

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



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.

9 SMS credits remaining. Feedback and indication			
• SMS reminder sent to 61412900600 OK.			
SMS Template: Appointment reminder 💠 Edit 🖉 Preview SMS			
It is highly recommended to preview the messages first, messages w SMS credits.			
Email Template: 🗧 🕈 Edit 🗷			
Send SMS Send Email Send SMS and Email			

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

1	Appointments		Send	ren	ninders	Annointmen	ts 1 Contactable	Via Fmail	Contactable Via
	Clients	~		Temp	late:	ppontenen	🗧 Edit 🗹	⊡⊠ Em	ail Template:
1	Treatment	~	9 SM3	credits	remaining.				i i
1	Stock	~	Time		Client	Mobile	Email		Title
1	Communication		09:00	- 09:15	Amelia Pfannerstill		jennyfer.wintheise	r@legros.org	Ava Davis: Ame
	Notices								
	Appt reminders		Sen	d now	Cancel				

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

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

Date: 31/01/2014	Change		1 Appointments				1 Co	
	<		Janu	ary 2	2014		>	E
9 SMS credits ren	Su	Mo	Tu	We	Th	Fr	Sa	
O Time C	29	30	31	1	2	3	4	l
	5	6	7	8	9	10	11	
09:15 - 09:45 W	12	13	14	14 15	16	17	18	50
	19	20	21	22	23	24	25	
Send now	26	27	28	29	30	31	1	
	2	3	4	5	6	7	8	

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.

Appointment Reminders

	 SMS remi SMS remi SMS remi SMS remi An email An email An email An email An email 	nder sent to nder sent to nder sent to nder sent to reminder is s reminder is s reminder is s	6143213235 6141290060 6141290060 6141290043 sent to domi sent to fermi sent to fermi sent to fermi	4 OK. 0 OK. 5 OK. n.olson@remp n.olson@remp e.sch	:humm.info beldickinso beldickinso actrembla ect tem	o. n.name. n.name. y.info. ¡Palte				
d .	SMS Temp	late: Appoi	ntment remin	ider 🗘 🖨	idit 🗷	🖉 🖂 Ema	ail Template:	Appointm	nent reminder	¢ Edit
e	SMS credits	remaining.				C				
It i me cre	s highly reco essages with edits.	ommended to 140 characte	o preview the	e messages fir st more SMS	st,		744		3 Pre	eview
	2	Client	Mobile	Email			Title			
	^{oso} Cheo		intment	Sharmony@bay	er.com		Tom Wilson: Alex Langworth - Clini Consultation	ys cal	Preview SMS	Preview Email
	09:30 - 10:15	Susie Kuhlman	0432132354	domingo@stan	nmschumm	.info	Lily Harris: Susie - Clinical Consulta	Kuhlman Ition	Preview SMS	Preview Email
☑	10:30 - 11:00	Rosetta	0412900600	fermin.olson@r	rempeldickir	ison.name	Tom Wilson: Rose	etta	Preview SMS	Preview Email
		Lenner				Consultation				
	11:30 - 12:30	Rosetta	0412900600	fermin.olson@r	rempeldickir	ison.name	Tom Wilson: Rose	etta	Preview SMS	Preview Email
		Lenner					Consultation			
☑	13:15 - 13:45	Elda Sawayn	0412900435	maxie.schmitt@	pagactrem	blay.info	Lily Harris: Elda S	awayn -	Preview SMS	Preview Email
0	Sendo	out					Clinical Consultat	ion		
	Send now	Cancel								

10.7 SMS report

Admin can check out the SMS report.

Reports Charts	
Clinic invoice report	Clinic revenue report Clinic
Therapist invoice repor	Therapist revenue report
Health fund claim repo	rt
Most visited clients rep	Most paid clients report
SMS credits report	

Here is an example report.

SMS credits: 5				
Clinic: - All clinics -	Apply			
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		

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

New letter template

Select the fields below for dynamic content such client's name, appointment time, ..., etc. Apply formatting if necessary.

Template name *	Thanks for referral
Related to	Referral \$
Content *	Add dynamic field - Client - + - Professional - + - Appointment - + - Business - + - General - +
Example	$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$
	Date: {{Date.Today.Full}} To {{Professional.Title}} {{Professional.LastName}} RE: {{Client.FullName}}
	DOB: {{Client.DateOfBirth}}
	Thank you for referring this patient.
	{{Practitioner.FullName}}

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).

```
1 {{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.

New letter		
Select template	Thanks for referral	 New template
Client	James Bond	Recipient
Professional	Wise Tester 👻	Recipient
Practitioner	Mark Huang 👻	select, content will change
Subject	Thanks for referral	
Letter content	A • Ti • B I S	
	Date: 01 February 2014 To Tester	
	RE: James Bond DOB: 1970-03-01	
	Thank you for referring this patien	ıt.
	Mark Huang	

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,

Are you sure?		×	
	Cancel	ОК	

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

Letter - 1	Edit	Delete	Email letter	Generate PDF
Email sent.				

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

Le	tters	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 DoB: 1970-03-01 Thank you for referring this patient. 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.

After creation, to assign a c	lient to a new group, must c	reate a matching insurance policy first.
Name *		
Code *	must be unique	
Billable to *	✓ Medicare	; New
Notes	Medibank Private	
	MBF	
	Work Cover	

Client Groups

12.2 Assign Client Group to Client

To assign a client group (exists already)



Find a client, select 'Paying group' tab

Client - Mustafa Russel Edit New Invoice Receive Payment Send Letter										
Clinic: Brisbane Practitioner: Ava Davis										
Summary	Appointments	Treatment cases	Treatments	Medical history	Documents	Billing	Paying group	Letters		
Treatments this year: 0										
Name	Client group	Member	ship	IRN Referr	al Max	<pre>< therapy</pre>	/ count			

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

New insurance policy : James Bond					
Insurance company *	Medicare	New			
Policy name *	Medicare				
Membership No.	123123				

Reload client record page, click 'Change' button

Joined	30/12/2013		
Current client group	Change (to add to a new client group, need to create an insurance policy first.)		
Medicare number			

Select a new client group

Change Clier	it Group		×
Current client gro	– Select Client Group – Private Patient		
To Client Group: 🔽	Medicare EPC		
		Change	Close

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

Create appointment	can char	ng	e
Clinic	Acacia Ridge	÷	
Client	James Bond		Details
Client group	Medicare	-	Details
Therapist	Mark Huang	+	
Title	Overrides default event title		
When Only show for gr Treatment category	Tuesday 2013-07-02 09:00 to (OUP Clients Clinical Consultation	09:1 \$	5 All Day
What for	type to find service		
Description			1
Repeats	Does not repeat 💠		
	Authorize		Create

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".

Treatment categories

Category name	Code	Service count
Clinical Consultation	BY	8
Hydrotherapy	нт	0
Training class	тс	1

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

New training class

Class name *	Pilate Class - Monday Night
Clinic	Kuraby \$
Trainer *	Jackie Chan
Assistant	Tom Hanks
Time	All Day: 🔲
	Start time: 2014
	End time: 2014
Venue	Zillmere Community Centre
Capacity	20 🗘
Service *	Pilate Class - Single New training class category C
Fee	\$ 15.0
	Price may be changed for individual at registration time
Description	
	Create Cancel

The below is a training class detail page.



ClinicWise will create an event note on diary.

 5:00 p - 6:00 p	Г
Pilate Class - Monday Night	
-	

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

Appointment	Go to class Delete			×
Clinic:	Kuraby			
Title:	Pilate Class - Monday Night			
Therapist:	Jackie Chan			
Attendants:	0			
Treatment category	y:			
What for:				
When:	Monday 03/02/2014 17:00 to 18:00			
Notes:	Empty			
		Confirm	Cancel	Close

Training Classes

13.2 Register for Training Class

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

Register training class

Training Class	Pilate Class - Monday Night			
Client				hint: type and select
Fee	\$	15.0		

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

At	tendants 3/20	Complete			
#	Client	Fee	State	Modified	
1	Nicole Kidman	\$15.00		02/02/2014 17:42	Delete
2	James Bond	\$12.50		02/02/2014 17:42	Delete
3	Bruce Lee	\$0.00		02/02/2014 17:43	Delete

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

(Client - Nicole Kidman Edit New Invoice Receive Payment Send Letter							
(Clinic: Acacia Ridge Practitioner: Jackie Chan							
	Summary	Appointments	Cases	Treatments	Follow-ups	Medical history	Documents	Billing
	Date			Clinic	Treatme	nt	Pract	itioner
	Monday 03	02/2014 17:00 to 1	8:00	Kuraby	Pilate Clas	s - Monday Night	Jackie	Chan

13.3 Complete Training Class and Charge Clients

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

Attendants	3/20	Complete
------------	------	----------

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

Training Classes

#	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 a	nd Accept Payment
4	2014-02-02 17:48	Kuraby		Nicole Kidman			\$15.00			Create Invoice	
										Create Invoice a	nd 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).

Reports Charts



Click one report button,

Reports - Clinic invoice report								
Clinic - All clinics -		/						

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 predefined there.

Reports



Click 'Apply' button to view your report.

Rep	orts - Clinic	invoice re	eport					
Clinic	Brisbane		\$ 11/	11/2013 - 31/01/2014	Apply			
Invoice	e Count: 106 Tota	il invoice amour	nt: \$13,230.	00				
#	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	lient Amount olden O'Hara \$240.00 oledad Dietrich \$240.00 rion 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.

Reports - Therapist invoice report Therapis Mark Young Jackie Miller Ava Davis Tom Wilson Lily Harris

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

Reports - Therapist invoice report

Therapis	Jackie Miller	\$ 🛗 2	014-01-01 - 3	2014-01-31 👻 Apply	
Invoice	count: 3 Total invoice amou	ınt: \$165.00			
#	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', $\hat{a} \in \mathbf{R}$, etc.

14.3 Practitioner Reports

Practitioner can only see self reports.

Example:

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

B	Reports & Charts	~
	Reports	
	👔 Charts	

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

Charts - Reports									
Clinics Clients	Therapist	Appointments	Therapies	Payments					

Within the category, click individual chart.

Charts - Clinics	1		111 2013	3-11-01 - 2014-01-31 🗸
Monthly invoiced amount	Monthly invoices	Monthly order amount	Daily order amount	Monthly revenue

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.

															2013-11-08 - 2014-01-0
÷		N	ov 20	13		→	← Jan 2014				14		→	This month	
Мо	Tu	We	Th	Fr	Sa	Su		Мо	Tu	We	Th	Fr	Sa	Su	Last month
28	29	30	31	1	2	3		30	31	1	2	3	4	5	Last 3 months
4	5	6	7	8	9	10		6	7	8	9	10	11	12	Last 6 months
11	12	13	14	15	16	17		13	14	15	16	17	18	19	Last 12 months
18	19	20	21	22	23	24		20	21	22	23	24	25	26	Last 12 months
25	26	27	28	29	30	1		27	28	29	30	31	1	2	Custom Range
2	3	4	5	6	7	8		3	4	5	6	7	8	9	FROM TO
															2013-11-08 2014-01-09
															Apply Cancel

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.

Cha	<mark>rts</mark> - Therapist	Clinic: All Brisb	ane Sydney			2013-11-01 - 2014-01-31
Мо	nthly order amount	Monthly orders	Daily Revenue			
Thera	apists:3					
			Monthly orde	r amount		
3	3,500					
3	3,000					
2	2,500	-			_	
ollars	2,000 ——————————————————————————————————					
	1,500 ———————————————————————————————————					
1	1,000 ——————————————————————————————————					
	500					
	0	2013-11	2	013-12		2014-01
		Ma	ark Young 🔲 Jackie	Miller 📒 Ava Davis		

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

