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Overview

Welcome to ClinicOffice v5

The purpose of this guide is to walk you through the main features of ClinicOffice v5 and explain in simple terms how to get the most out of the software.

The guide assumes that you have at least a basic understanding of Microsoft Windows and are familiar with basic Windows concepts (e.g. double-clicking, right-clicking, drag-and-drop etc.).

About the ClinicOffice v5 Manual

This manual is designed to be as comprehensive and informative as possible. It exists in an electronic and printable format and is divided into three sections: -

Section 1 – Getting Started

The Getting Started section contains all the information you need to: -

- Install ClinicOffice
- Select/Create a database
- Log on to ClinicOffice v5 for the first time

Section 2 – User Guide

The User Guide will be your main point of reference for ClinicOffice v5. All the program's features and functionality are explained in the User Guide.

Section 3 – Tutorial

The Tutorial teaches you the fundamentals of ClinicOffice v5. We highly recommend that you run through the Tutorial from beginning to end, no matter what your level of experience.

Printed Help Information

The contents section at the start of this manual should help you to find information on any aspect of the program that you need help with.

Please bear in mind that this manual deals with the full functionality of ClinicOffice v5. Certain features may not be available on your installation of ClinicOffice, depending on what edition or modules you purchased.

Section 1 – Getting Started

The 'Getting Started' section will help you to: -

1) Install ClinicOffice
2) License ClinicOffice
3) Log on to ClinicOffice v5 for the first time
4) Create your own Database
5) Network ClinicOffice

Installing ClinicOffice v5

To start the ClinicOffice v5 installation download the setup file from our Pioneer Software website. Before running the installation file you need to make sure that you have the **Microsoft .Net Framework 4.5** or newer installed. If you are using Windows 10 this should be already be installed.

If you have the **Hosted Edition** of ClinicOffice, then you will not need to install ClinicOffice locally and instead the instructions to connect to our Hosted system will be sent to you via email. These instructions are only pertaining to local installations of ClinicOffice.

After downloading the set-up file, please run it and follow the steps below.

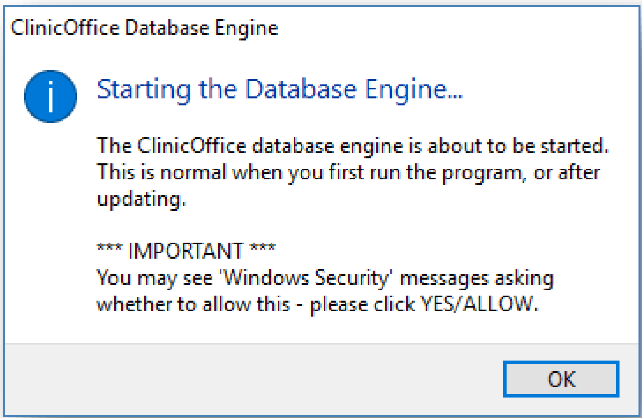
1. If you agree to the **EULA**, please select "**I accept the agreement**" and click **Next**
2. The second screen will allow you to select which folder to install ClinicOffice v5 to. If you are unsure, please leave it as it is and click **Next.**
3. The third screen will allow you to select which folder to install the database to. Again, if you are unsure please leave it as it is and click **Next**.
4. The fourth screen allows you to select the name of the ClinicOffice folder on the start menu. We would recommend you leave it as it is and click **Next** to continue.
5. On the fifth screen select the shortcut you wish to display on the desktop and then click **Next**
6. Click **Install**
7. After the files have been installed, simply click the **Finish** button to exit the installation program

***NOTE:** If you are using the **Server Edition** of ClinicOffice for step 5 you will need to select to create a "SERVER" edition shortcut for both the server machine and any client machines you install ClinicOffice. Do not select the Professional Edition icon for the client machines if you are using the Server Edition.*

Launching ClinicOffice v5

Following the installation process, you should have noticed that a ClinicOffice v5 icon has been placed on your desktop. Double-clicking on the icon will launch the program. Alternatively, you can launch it via the Start menu in Windows.

If you are running the Startup or Professional Editions of ClinicOffice, then the first time you open the program it will present a message asking to start the database engine (like the one to the right). Just click **OK** to this and **Yes** to any user control messages.

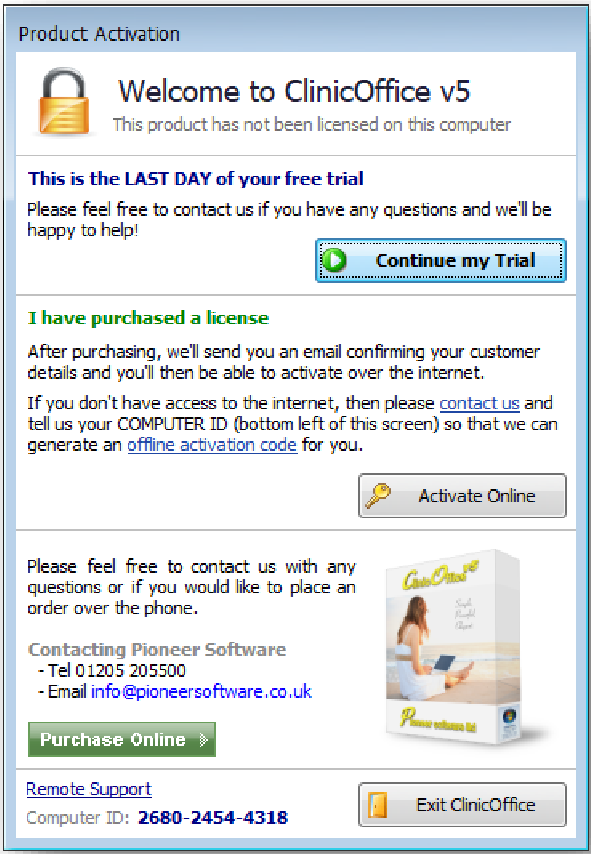


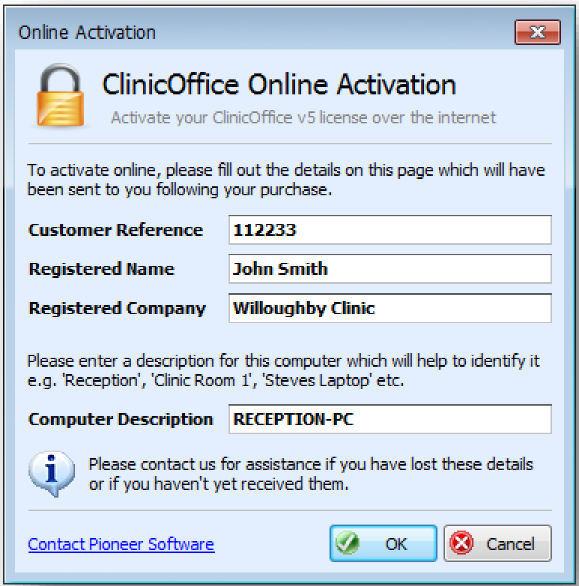
Licensing ClinicOffice

Once ClinicOffice makes a connection to the database engine, then a Product Activation window will appear (see the example to the right). The built-in licensing system protects the program against unlicensed copies.

If you have downloaded a trial of ClinicOffice then you can run it for up to 30 days by clicking the button “**Continue my Trial**”. After this period is up you will need to either request for a trial extension or purchase a license to continue to use the program. If you are using the Server edition the Activation screen will be similar, but it will be missing the free trial section, this is because the trial is not on the server edition.

This screen will appear whenever a license cannot be detected. It will also appear sometimes on a machine that already had a license if there has been a change to the machines network card, either physical or software related.



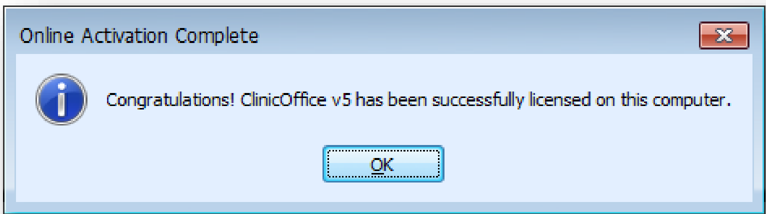


So long as you have an internet connection, click the **Activate Online** button. The Online Activation window will appear (as demonstrated by the windows to the left).

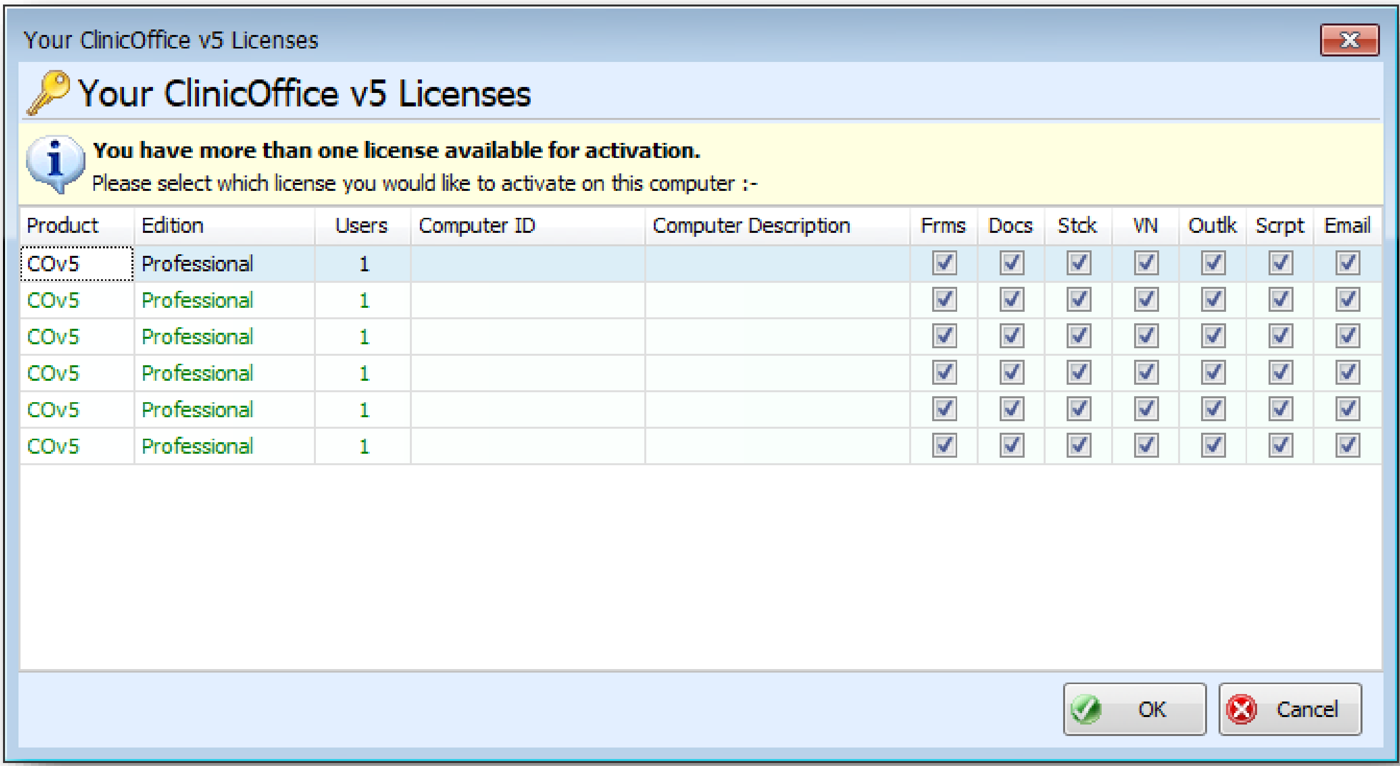
The information that you should enter is the **Customer Reference**, **Registered Name** and **Registered Company** fields. These will be sent to you in an email after your initial purchase of ClinicOffice. **<u>Please save these details for future reference as you will require them if you wish to transfer your license</u>**. If you have misplaced these details, then please either email or call us and we will provide you with these details again. The **Computer Description** will be automatically filled in but you can choose to change this if you wish to.

Press **OK** once all 4 fields have been filled in. ClinicOffice will now connect to our online server. So long as you have entered the correct details and have sufficient licenses then the following message below will appear:

Press **OK** to this message. You can now continue to use ClinicOffice.



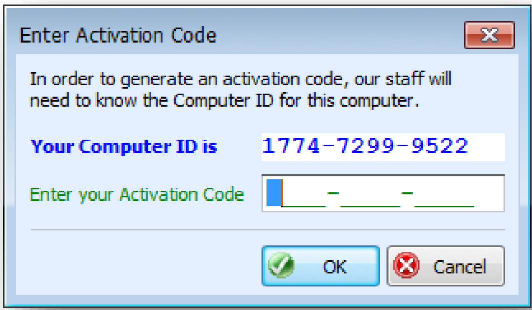
If when you click **OK** to the Online Activation window and you have more than one license available, then the next window below will appear: -



Simple left-click on the license you wish to use and click **OK**. Again, an activation completed message will appear.

Entering an Activation Code Offline

If you do not have the internet or your site's firewalls block regular HTTPS traffic, then call or email us for an offline computer activation code. Please make sure that you have your Computer ID in front of you so that we can give you an activation code there and then.



Once you have received your activation code, click the "**offline activation code**" blue link. The Enter Activation Code window will appear.

Enter your code into the **Activation Code** field and click **OK**, after which ClinicOffice will be licensed on your computer.

NOTE: *If you are using the **Server Edition** of ClinicOffice then you only need to license one computer, which will then store the license onto the server so that all computers on your network will be able to access ClinicOffice without the need of additional licensing. For the **Professional Edition** of ClinicOffice, each computer will require its own license.*

Database Selection & Logging on and off

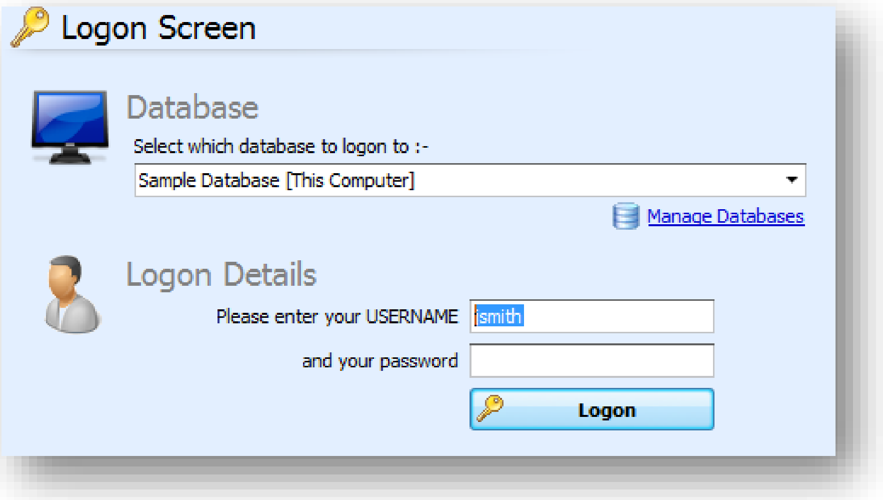
The logon screen will look slightly different depending on which edition of the software you are running.

We have provided a sample database (Willoughby Road Clinic) with a set of fictional staff, contacts and patients, which can be used to learn the basics of ClinicOffice v5. We recommend that if you want to enter live clinic data then you would be best off creating a new database instead of using the Sample Database.

When you run ClinicOffice, the first screen you will see is the Logon screen: -

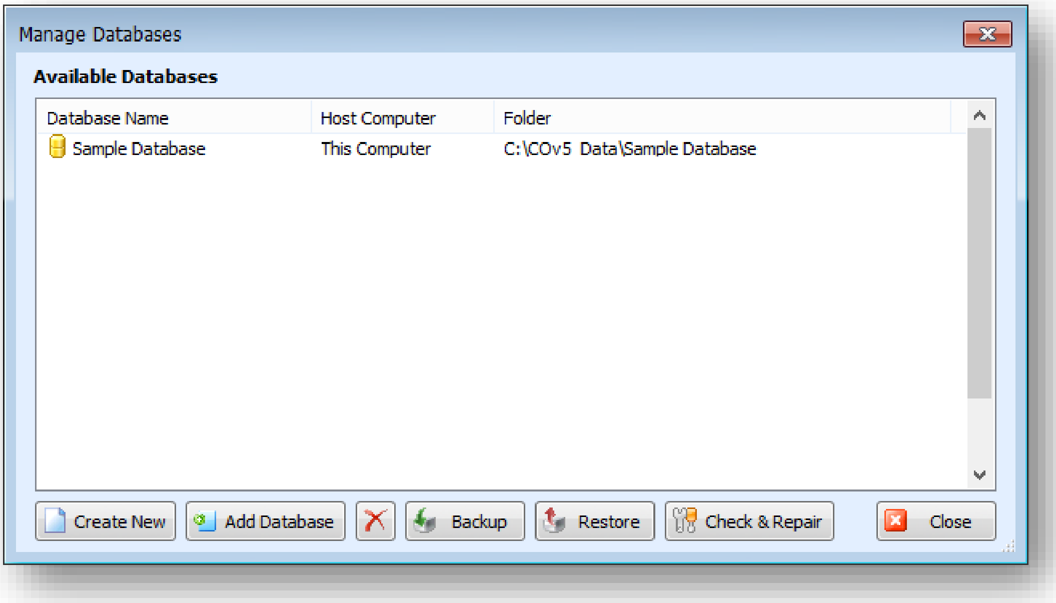
Logging on to the Startup or Professional Edition

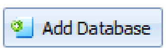
Logging on to the Startup or Professional edition



Click the blue link **Manage Databases**; the COv5 Databases window will now appear.

COv5 Databases Window



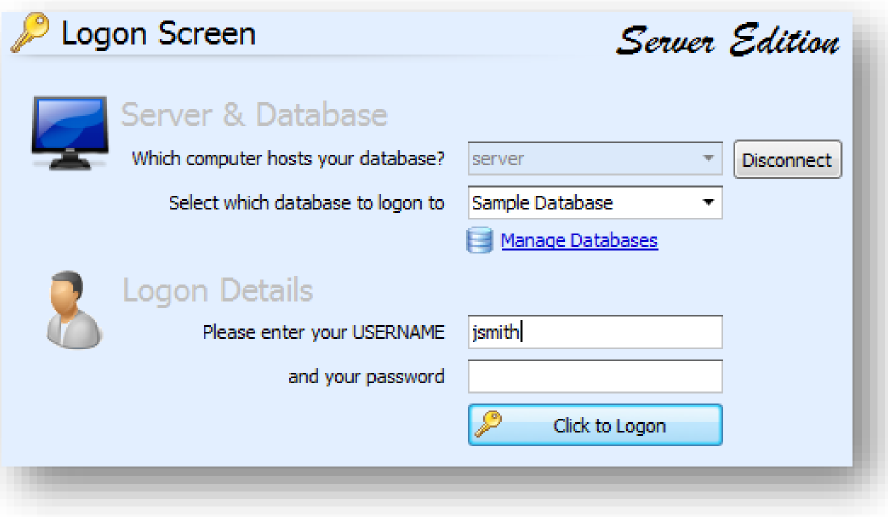
To locate your database, click the 

button and select either "This Computer" or "A Network Computer". If the database is on this computer, locate the folder that stores the ClinicOffice database and press **OK**. When you are finished, press **OK** and then press **Close** on the Manage Databases window. Under the section "Select which database to logon to" select your database, if it is not already selected, by left-clicking on the field and selecting it. Enter your username and password for this database; now press **LOGON**.

To create your own database, please see the section "Creating a New Database".

Logging on to the Server Edition

Logging onto the server edition



You will notice the main difference is the need to put in the name of your server computer (the computer that hosts the database). Once you have done this, press **CONNECT**. You will then have a list of databases that you can connect to. Select your database and enter your username and password; now press the **CLICK TO LOGON** button.

Logging On and Off

Let's practice logging on and off with the Sample Database on the Startup or Professional Editions. Alternatively, you can use the trial of COv5 to do this.

Make sure that the "Sample Database" is selected. The selected database is indicated in the field above the username field. If another database is selected, then you'll need to change back to the sample database.

Type 'jsmith' in the username box without the quotes

Leave the password empty and click the **LOGON** button.

A successful logon will take you to the ClinicOffice v5 Home Page from where you can access all areas of the program. A good way to get straight into using ClinicOffice is to work through the ClinicOffice Tutorial (please see Section 3 of this manual).

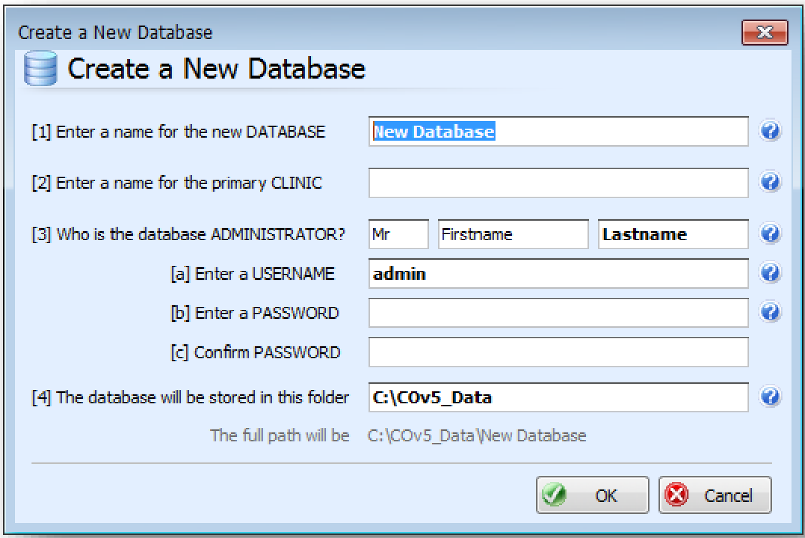
To log off from a database, click the **LOG OFF** button (

) which is located on the **Home** menu of the ClinicOffice screen. This takes you back to the Logon screen.

Creating a New Database

To create a new database click **Manage Databases**. When the Manage Databases, window has opened click the **Create New** button. This will open the following screen: -

New Database Window



For step **[1]** we would recommend that you give the database a descriptive name, for example an abbreviated form of your clinic name. For step **[2]** enter the name of your primary clinic. For step **[3]** enter your name and when giving yourself a username in point **[a]** you could have the first letter of your first name with all of your last name (i.e. John Smith will look like 'jsmith'), although there is no strict rule here. In points **[b]** and **[c]** enter your password.

If you are creating a new database using the Server edition of ClinicOffice then you will not need to worry about step [4]. If you are using the Startup or Professional editions, then we recommend leaving it in the default folder if you are not too sure where you should put it.

When you are finished click **OK** and your database will be created. All you need to do now is select the database as your current database, enter your username and password and logon.

NOTE: *Keep a safe record of your username and password, especially if you are likely to forget it! It is usually best using a combination of a few words that you will remember easily (a short sentence is helpful), vary the case types; insert numbers and add additional non-alpha-numerical characters.*

WARNING: *If you do forget your password, then you will not be able to access your database. The only way around this is if you have another supervisor on the system, then they can reset your password by going into your staff record's access rights and clicking the* ***Set Password*** *button. The alternative is for you to send us your database so that we can decrypt your data and extract the passwords, for which we will have to charge you.*

Networking ClinicOffice

Both the Professional and Server editions of ClinicOffice run on a client-server database setup. With the Professional edition ClinicOffice will automatically install this for you. With the Server edition you will need to install this separately and you will be given the installation instructions upon purchasing ClinicOffice.

Professional Edition

Since the database is already network ready all you need to do from the other computer is the following:

- Open ClinicOffice on the other computer
- On the logon screen click **Manage Database**
- Now click the **Add Database** button
- Select **A Network Computer**
- Enter the name of the host computer i.e. server
- Click **OK**
- Select a database and click **OK**

You can now select the database on the logon screen and login.

Server Edition

After you have installed the PGSQL database engine and have created the database you can access the database from another machine by following the steps below:

- Open ClinicOffice on the other computer
- Type the name of the computer that hosts your database
- Click the **Connect** button
- Select your database

You will now be able to enter your credentials and logon.

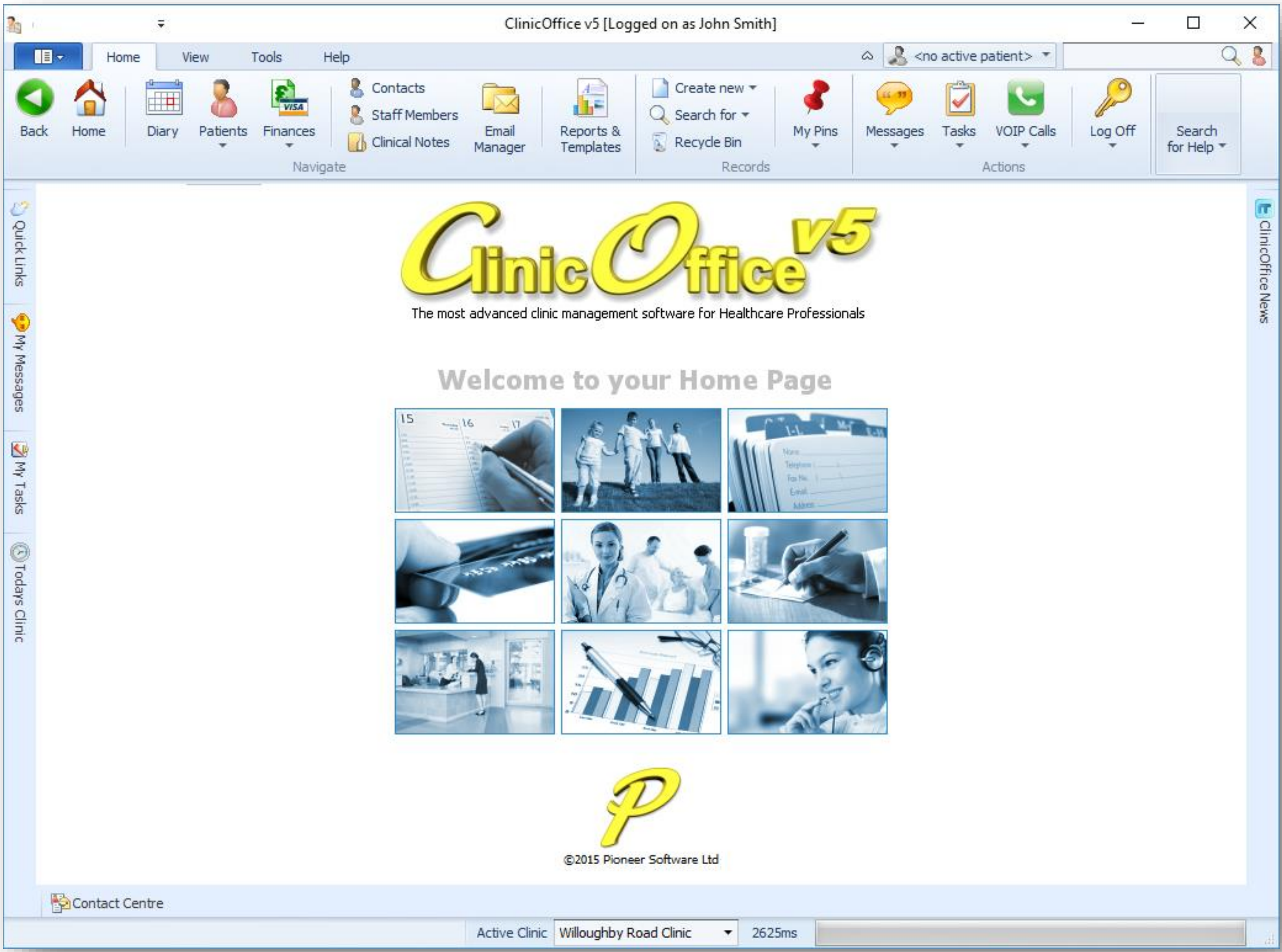
Note: *If ClinicOffice is unable to connect to the computer over the network, please make sure that network discovery is switched on both the server and client machines. If network discovery is switched on, please also check your firewalls allow through port 12010 for the Professional Edition and port 5432 for the Server Edition.*

Section 2 – User Guide

Your ClinicOffice v5 Home Page

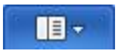
After logging on, the first screen you will see is the **ClinicOffice v5 Home Page**. From here, you can access all areas of ClinicOffice v5 by simply clicking on the appropriate link. If you hover the mouse pointer over each picture, text will appear to let you know what part of the software you will be taken to.

The ClinicOffice v5Home Page



***Tip:** You can return to the Home Page screen at any time by clicking the*  *button which permanently resides at the top of the screen. It is useful to get into the practice of returning to the home page frequently, in order to get used to the layout of the program.*

The ClinicOffice v5 Application Menu

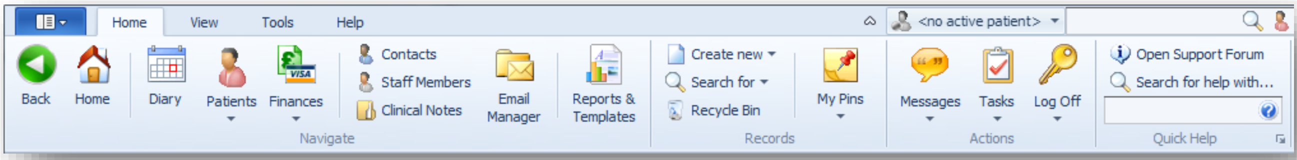
The application menu can be found at the top left corner of ClinicOffice and looks like this (). If you click this button a menu will pop up enabling you to access different parts of the software.

The second column of this menu shows the recently viewed records, which is useful if you need to revisit a record of someone that came in an hour or so ago.

The ClinicOffice v5 Ribbon Bar

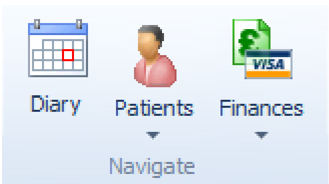
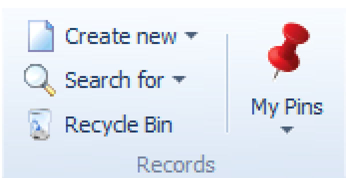
In addition to the side panel, there is also a toolbar (across the top of the Home tab) this is now called the Ribbon Bar. If you're familiar with using the Microsoft Office Suite, then this should be instantly recognisable.

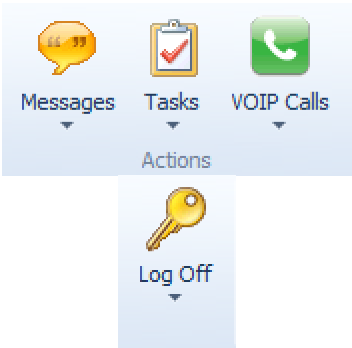
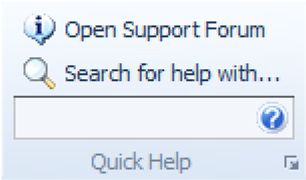
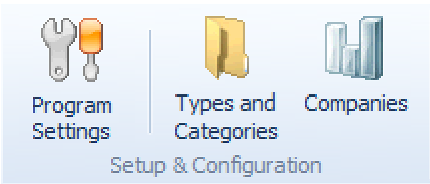
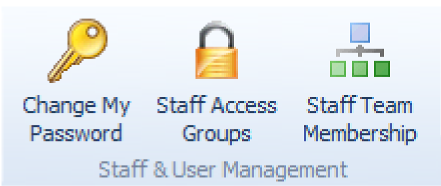
The ClinicOffice v5 Ribbon Bar

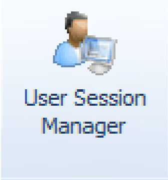
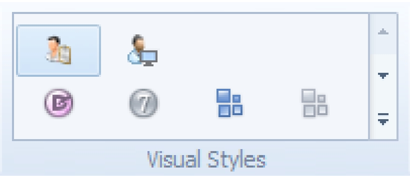
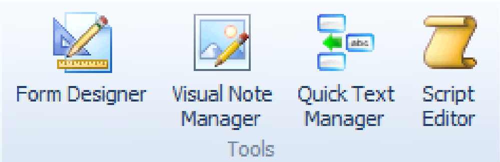
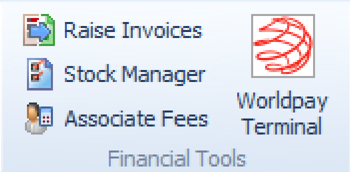
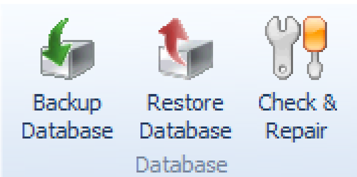


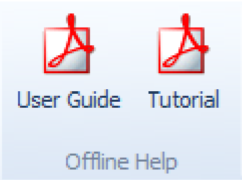
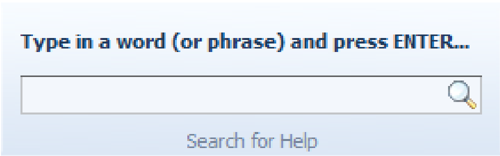
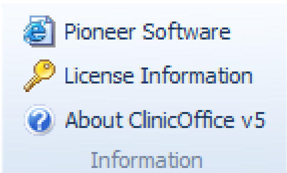
We've already mentioned the () button which returns to the home page. Additionally, you can move backwards () through screens that you have already visited (just like Internet Explorer). Let's take a closer look at what all the buttons on our ribbon bar can do.

First let's look through the Home tab on the ribbon bar. This is where you will find all the main navigational controls.

	**Diary** Takes you straight to the diary page. **Patients** (Top Button) Takes you straight to the patient grid. (Lower Button) Opens a drop-down menu that stores the Consent Manager, Patient Contact Centre and the SMS Message Centre. **Finances** (Top Button) takes you to the finance centre. (Lower Button) Opens a dropdown menu giving you the option to go straight to a finance grid.
	**Contacts** Takes you straight to the contact grid. **Staff Members** Takes you to the staff grid. **Clinical Notes** Takes you to your clinical notes grid. **Email Manager** Takes you to a full featured email client. **Reports & Templates** Opens the Report Centre.
	**Create New** Opens a dropdown menu giving you the option to create different types of new records. **Search For** Opens a dropdown menu allowing you to search through different types of records. **Recycle Bin** Takes you straight to the deleted grid.

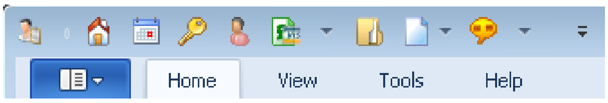
	My Pins Opens a dropdown list of all Pinned Records.
	**Messages** (Top Button) Creates a new message. (Lower Button) Has the option to create a new message and to check for new messages. **VOIP Calls** Allows you to make VOIP calls, view VOIP logs and settings. **Tasks** Allows you to create a new task
	**Open Support Forum** This will take you to the main page of the ClinicOffice support forum. **Search for help with...** This will allow you to search on a topic in the support forum.
	**Active Patients** This feature allows you to track a patient's profile. Hence newly created appointments, invoices or payments will be auto filled.
	**Quick Search** Is always available and allows you to search freely across different areas of the program.
Now lets take a look at the View tab.	*This is where you can change some of the settings.*
	**Program Settings** Contains 4 Sections: <u>Local Computer Settings</u>: From here you change the spell checker and dictionary. You can also adjust the way ClinicOffice updates, reset the dock windows and configure your VOIP. <u>Global Settings</u>: You can set the default preferred name format, change the way the record codes are allocated. You can also set up your SMS service, Loqate accounts and enter your email account details, along with a handful of other options. <u>Clinic Settings</u>: Allows you to create a new clinic or edit the details of an existing one. <u>User Settings</u>: Here you can change the known as format of the newly created staff member and re-activate any messages within COv5 that has been turned off. **Types and Categories** Opens the Types and Categories Editor. **Companies** Takes you to the company grid.
	**Change Password** Let's you change your password. **Staff Access Groups** Opens the Access Groups Editor. **Staff Team Membership** Opens the Staff Team Membership window. This will allow you to assign staff to different teams.

	**User Session Manager** Enables you to check which users are actively using ClinicOffice.
	**Visual Styles** Let's you change the look and feel of ClinicOffice by selecting a 'skins' type. You can choose any style displayed here or if you click on the  button you will be able to view many more skin types. We will add to these as new ones become available.
Now lets take a look at the Tools tab.	*You will find more advanced features and settings here.*
	**Form Designer** Allows you to create, edit, delete and import/export a clinical form. **Visual Note Manager** Allows you to create, edit, delete and import visual notes. **Quick Text Manager** Allows you to create predefined notes for the clinical notes and general memo fields. **Script Editor** This allows for greater customization with the way ClinicOffice behaves. Requires knowledge of C# or VB.NET (Only to be used with our guidance). **Raise Invoices** Opens the Raise Invoices from Charges screen. **Stock Manager** Opens the Stock Manger. **Associate Fees** Opens the Associate Fees Manager. **Worldpay Terminal** This opens the Worldpay Terminal Window
	**Backup / Restore** Allows you to take a backup of your database or restore from an existing backup. **Check & Repair** This checks the database for any anomalies and repairs any it may find. **Audit Trail** Only available for the Server and Hosted editions of ClinicOffice. Provides an overview and search functionality on the audit history of the database. **Import Data** Allows you to import data from a CSV File (**C**omma **S**eparated **V**ariable format). **Advanced DB Operation** This will allow you to adapt the software even more to your needs (Only to be used with our guidance).

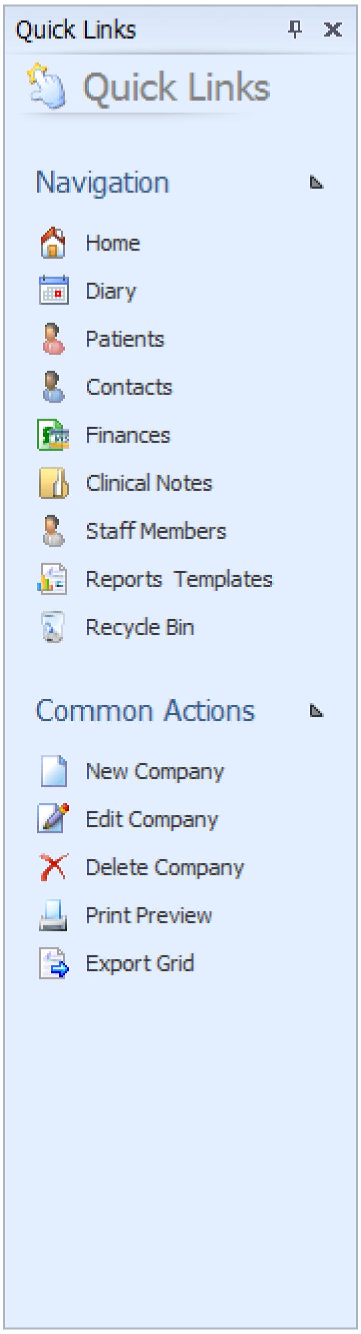
	**Check for Program Updates** If for some reason you have auto update switched off in your settings, you can manually check for updates here.
And finally a look at the Help Tab.	*This is where you can get help and assistance for ClinicOffice.*
	**User Guide** Opens this user guide in PDF format. **Tutorial** Opens the tutorial in PDF format.
	**Search for Help** Search the support forum based on a key word(s).
	**Remote Support** Downloads a small utility that allows us to connect remotely to you. If you already have downloaded the utility, then ClinicOffice will detect it and open it up. **Support Forum** Takes you straight to our members support forum where you can find answers to your questions. **Online Help Desk** Takes you to our online support chat. **Email Support** If you have not found the answers to your questions from the manual or the support forum the next step is to email the support team direct. Clicking here will allow you to do this.
	**Pioneer Software** Takes you straight to our website. **License Information** This allows you to add, upgrade or remove a license. **About ClinicOffice v5** Pops up with a window giving you the version number and other details about your ClinicOffice installation.

At the top of the ribbon bar is the quick access toolbar  which currently has the **HOME**, **DIARY** and **LOG OFF** buttons on it. You can add any of the buttons from the ribbon bar to the quick access toolbar by simply right-clicking on the button you would like and select **Add to Quick Access Toolbar.** This could enable you to add all the frequently used buttons to the quick access toolbar and minimise the rest of the ribbon bar by double-clicking on one of the tabs. This will free up space on your screen (which is important if you are using a low-resolution monitor). If you have done this correctly it will look something like the following below.

Minimised Ribbon Bar



Now a single click on one of the tabs will pop the ribbon bar down whilst you look for a control and then it will disappear again once you click elsewhere on the screen. But double clicking will show the full ribbon bar as it was before you minimised it.

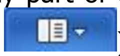


The ClinicOffice v5 Quick Links Panel

The **ClinicOffice Side Panel** (which is shown when you hover the mouse over the Quick Links tab on the left-hand side) is very useful in navigating around ClinicOffice v5. You can also keep it permanently open by clicking on the **PIN** icon (located next to the **X**). If you have the Quick Links pinned, you can move the panel around the screen and dock it another side of ClinicOffice. To reduce the panel back to the tab either click on the **PIN** icon or press the **X**.

There are two sections on the side panel: -

1) Navigation

The Navigation section allows quick access to any part of the program. (You can also navigate through ClinicOffice using the () button at the top of the screen or the buttons on the Ribbon bar)

2) Common Actions

The Common Actions section is context-sensitive, and hence the contents depend upon what screen you are currently looking at. For example, in the screen shot to the left, the user is looking at the Patient Database and so the common actions all relate to the patients.

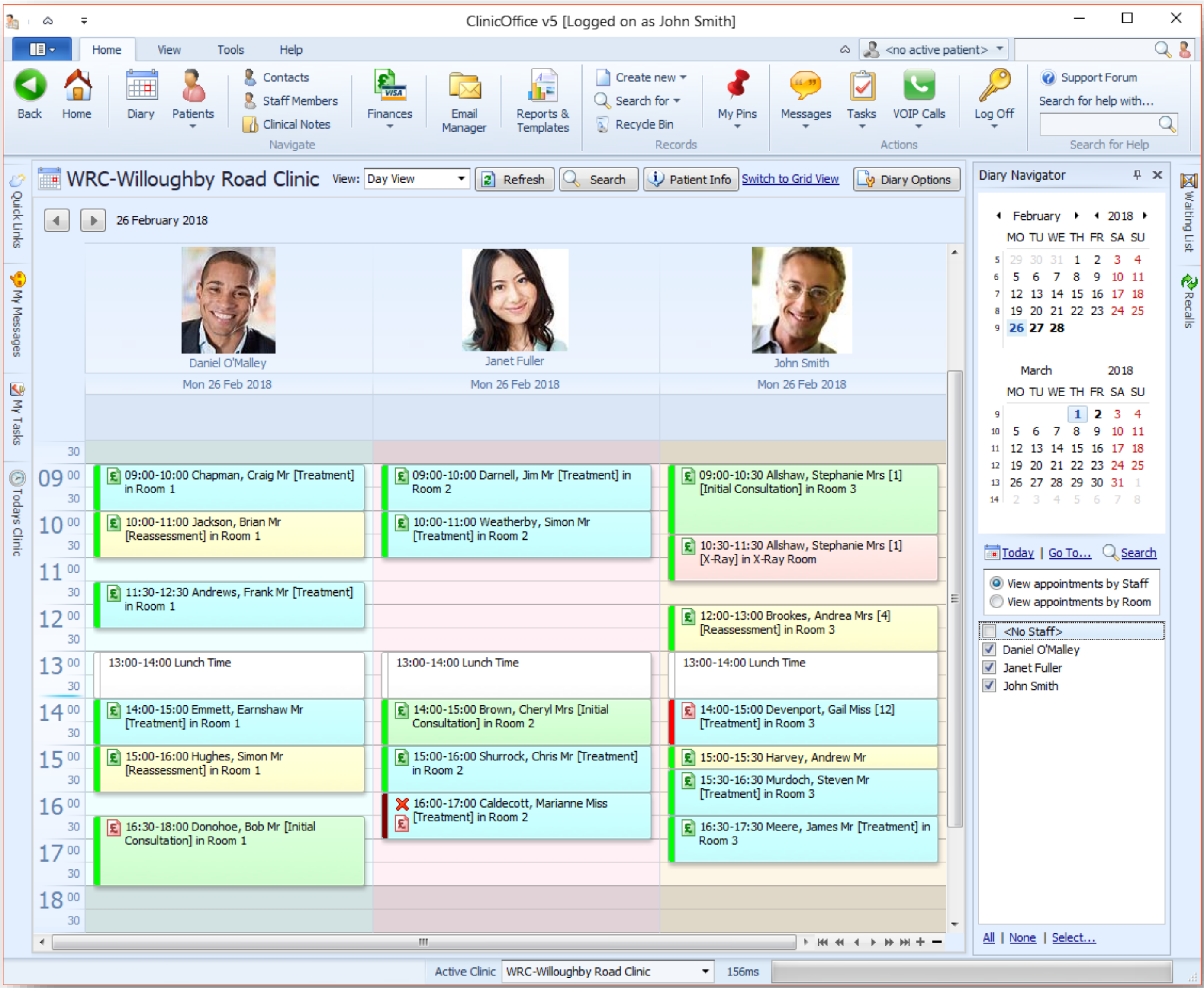
You can expand or collapse each of the sections by clicking the up/down arrows ().

The panels available on the left side are discussed at length during the part of the manual that relates to them (Today's Clinic, My Messages and My Tasks)

The Appointment Diary

The diary is probably where you will spend most of your time while using ClinicOffice, so we've done our best to make it as easy to use as possible. We've also made sure that the diary is tightly integrated into the rest of the program and that it gives you maximum flexibility in creating, editing and viewing your appointments.

The Appointment Diary



Each staff member can now have a different background colour. This helps in visual recognition of each staff member. You can also see that the background of the diary indicates the working hours for the staff members. A brighter colour means they are available, whereas a more shaded colour indicates that they are not working. Once the new staff member is setup you can choose a colour for them.

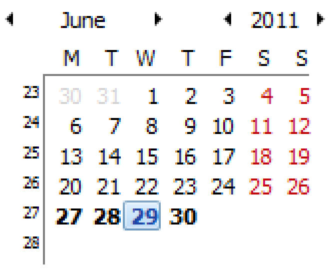
Over at the top right, we have the calendar. This allows us to navigate through the diary by selecting different dates. Multiple dates can also be selected simultaneously (*Please note this can affect performance*).

Under the calendar are the different view modes for the diary, and under the view modes is the staff member selector. This will allow you to decide which staff diaries you want to view. We'll now go on to look at each of these features in more detail.

Navigating the Diary

To the top right of the diary is a calendar. The calendar can be used to select which dates to display in the diary. Simply click the desired day on the calendar and the diary will move to the selected date – simple. You can display additional months on the calendar by left-clicking and dragging the bottom and left-hand sides. Continue to drag until an additional month appears.

The Diary Calendar



Here are some other things you can do with the calendar: -

Select Multiple Days

You can select more than one day by clicking and holding the left mouse button and then dragging the mouse across two or more days.

View a Different Month or Year

Click the left or right arrows at the top of the calendar where the name of the month is, to view either last or next month(s) dates. You may also do the same with the year. To return to the present date just click the **Today** link.

Changing the Day / Date

You will notice that you can move to today by clicking on the **Today** link. You can now click the **Go To** which gives you the options of 1 to 6 weeks/months from now, allowing you to move quickly through your diary with ease. The search for free time is also available here by clicking **Search**!

Selecting Date

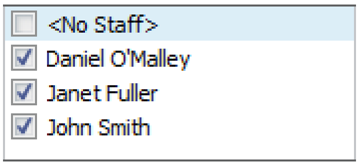
Diary View

There are two different view modes that the diary can operate in, namely Staff Diary view and Room Diary view. These allow you to either view appointments by staff member, or by the room in which the appointment takes place. There is also an option of grouping the appointment columns by date when more than one date has been selected. We recommend experimenting with this feature to find which option suits you best.

Diary View

Selecting Staff Members or Rooms

Selecting Staff Members



Depending upon whether you are viewing the appointment diary by Staff or by Rooms, you can select which staff/rooms are shown in the diary by ticking the items in the list.

The **All** and **None** links underneath the list changes your selection as per their names. Also, double-clicking on a single name will select just that one name. As well as this if you right-click on a name, a menu will appear giving the same options. On this same right click menu there is an option to **Invert Selection** which will un-select the staff you had selected and select the staff you had un-selected. There is also an option to select Teams, which is explained more in the next section.

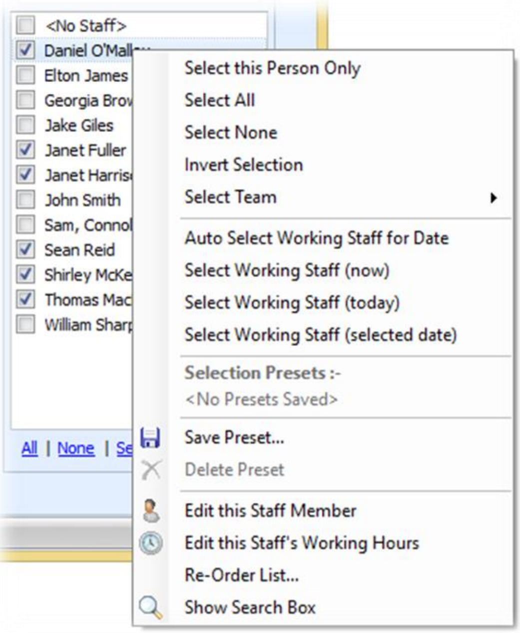
Towards the bottom of the right click menu are 3 other useful options: **Edit this Staff Member**, **Re-order List** and **Show Search Box**. The 'Edit this Staff Member' will allow you to open the record for that practitioner.

When the option 'Re-Order List' is selected it will open a new window that will provide you with two options: **Sort staff alphabetically** and **Sort staff as shown below**. By default, the first option is what the diary is sorted by. If you select the second option, it will give you the ability to change the order that the staff names appear in and it provides you with a visual aid to do it with.

If you select the **Show Search Box** on the right click menu, a search field will appear just above the list of staff members. This search field performs searches based on letters being entered in a set order. An example is if the names are displayed as first name then last name, such as John Smith. To do a search for him you will have to type in "John" first then "Smith". If you type in "Smith" first, the name will not be located, and the field will go red. If you have the name displayed as Dr John Smith, then you will enter "Dr" first then "John" and then "Smith". To close the search field simply right-click on a staff member and select **Show Search Box**. It is the same principle with rooms as well.

Diary Preset Groups

Right Click Menu Preset Group



If you have many practitioners or rooms under a clinic's diary you may find that it is a laborious task swapping and changing the practitioners or rooms that you are currently looking at. To make things easier ClinicOffice has the Preset feature.

So, if you have a group of practitioners who work on Wednesday you can select these and Save them under the Preset name of "Wednesday". Alternatively, you can create preset groups based on the roles that the rooms play in the Clinic. You cannot though have a preset made up of both practitioners and rooms.

To create a Preset group follow the steps below:

1. Go to the Diary in the ClinicOffice
2. Select your practitioners or rooms that share a common feature
3. Right click on one of the names
4. Click **Save Preset…**
5. Enter the name of the Preset
6. Click **OK**

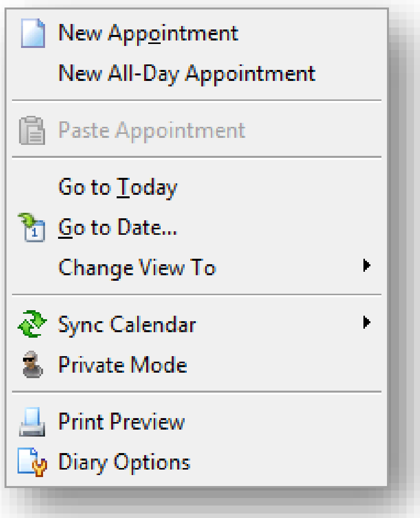
When you right click again you will notice that in the middle of the diary under **Selection Presets** is the name of your preset. When you select the preset your group will then be selected. This means that if you have more than one preset you can swap between groups quickly and easily.

A preset group is unique to the Clinic. This means that each Clinic can have its own defined preset group. Anyone with enough access rights can also use the preset groups that you have created.

There are also three default presets which are **Working Staff (now)**, **Working Staff (today)** and **Working Staff (selected date).** If you select the Working Staff (now) then all staff who are scheduled to work at this time will be selected. If you select the Working Staff (today) then it will display all the staff who are working today, no matter what day you happen to be looking at. If you select Working Staff (selected date) the staff who are working on that date you are looking at the time will then be displayed. By selecting **Auto Select Working Staff for Date**, the staff you have selected will automatically change depending on the day you are viewing and who is working that day.

Creating a New Appointment

The Diary right-click menu (WITHOUT an appointment selected)



New appointments can be created in several different ways.

To create an appointment in a diary slot, the easiest way is simply to double-click on the empty slot. This will bring up the Appointment Editor so that you can create the appointment. Note that the editor will already have filled out the time and date slots based on the time slot you clicked on.

From this same screen you can select the patient that is having the appointment, the practitioner taking the appointment, the room it is in, the Clinic, the appointment type and status. In addition, you can also type in any needed notes. Once you have finished click the Save and Close button.

What if you want to create an appointment which spans several slots?

Using the left mouse button, left-click and drag until you have the desired times highlighted, then right-click and select **New Appointment.** The Appointment Editor will appear, and the desired times will be displayed in the Start and End Fields.

For more information on the Appointment Editor please see the Appointment Editor section of this User Guide.

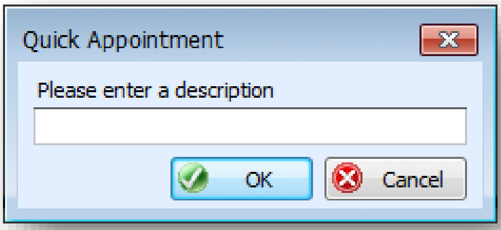
Creating a Quick Appointment

ClinicOffice allows you to create what we call Quick Appointments. When creating a Quick Appointment, you do not have to worry about all the details in the Appointment Editor (such as the staff member, room, appointment types etc.). You only need to enter the description.

To create a quick appointment all you must do is: -

1. Select the desired time slot(s) in the Diary
2. Press the **space bar**
3. Enter a description and click **OK**

Creating a Quick Appointment



Quick Appointments are ideal for such things as *staff meetings, bank holidays, staff holidays* etc.

Moving and Resizing Appointments

Appointments can be moved simply by dragging them with the mouse. To do this:

1. Position the mouse over the appointment you wish to move
2. Click and **hold** the **left** mouse button
3. Move the appointment to the desired location
4. Release the **left** mouse button

You will then be asked to confirm the move operation. You can turn this message off by ticking the box which says ***Don't show me this question again***, but we recommend leaving this confirmation message on because it also acts as a safeguard against accidentally moving appointments.

Moving the mouse over the top or bottom edge of an appointment will change the mouse cursor to indicate that you can now resize the appointment: -

Resizing an Appointment

As with moving an appointment, simply click and hold the left mouse button, then move the mouse up/down to increase/decrease the length of an appointment. The best thing is to experiment to get the hang of it.

Cut, Copy and Paste Appointments

The cut, copy and paste feature allows you to either move or copy an appointment to another date and time and/or to another resource (e.g. another staff or room).

To move an appointment, we can use the cut and paste facility as follows:

1. Right-click on the appointment
2. Click **Cut Appointment**
3. Select the destination slot for appointment (i.e. the new date/time or staff/room)
4. Right-click on the diary and then click **Paste Appointment**
5. Click **OK** if asked to confirm the operation

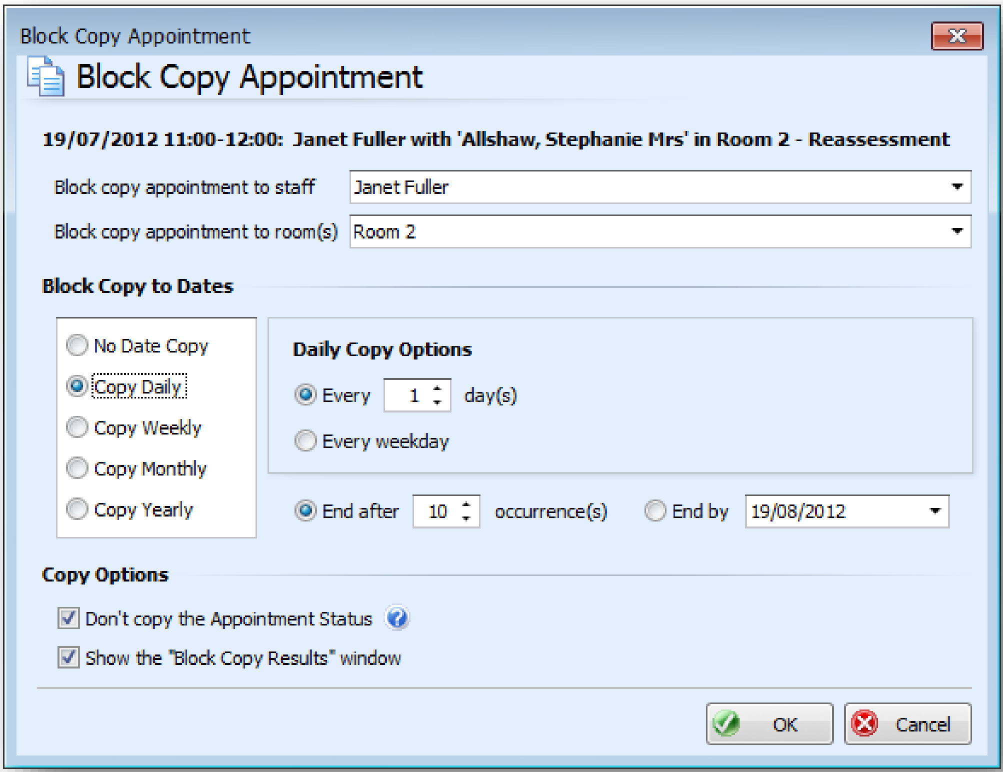
To copy an appointment, follow the same procedure but click **Copy Appointment** (rather than cut) in step 2. Copying an appointment is useful for creating follow-on appointments. Also, once you have copied an appointment, you can repeat the final 3 steps to paste to create multiple follow-on appointments.

Block Copy Appointments

You can make an appointment reoccur at regular intervals. This is helpful if a patient is coming in at regular intervals for a course of treatments. This can also be used to copy things such as lunch breaks or weekly staff meetings.

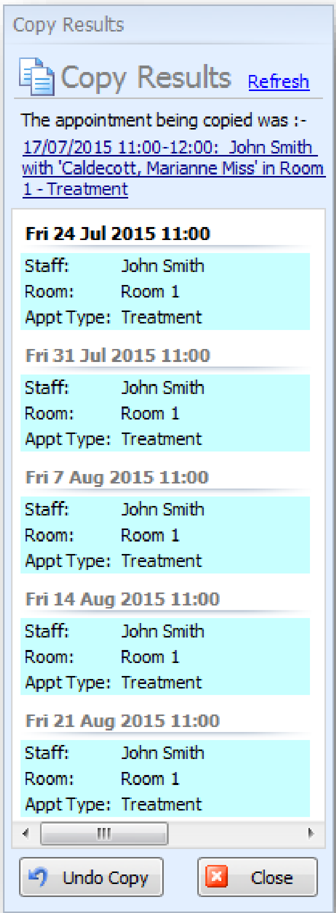
To block copy an appointment, right click on the appointment you wish to copy and select **Block Copy...** The following window will appear:

Block Copy Appointment Editor



This Block Copy Appointment editor is broken down into the following sections: -

Block copy appointment to staff	This allows you to select which staff member the copied appointments are for.
Block copy appointment to room(s)	You can select which room you wish to assign the copied appointments to, if there is a specific room.
Block Copy to Dates	This will allow you to copy the appointment to a set pattern according to the options you have chosen. For example, you can specify that the appointment should take place Tuesday and Thursday each week, or on the 1st Saturday each month. The options are quite comprehensive.
Copy Options	From here you can select whether you want the appointment status to be copied. You can also see the results of the copy, which will highlight any possible appointment conflicts.



After you have selected your parameters for the block copy click **OK** to save complete the block copy. This will now create the appointments. If you ticked the option 'Show the "Block Copy Results" window' then a new panel will open on the Diary called **Copy Results**.

If there is a clash between a copied appointment and another appointment, then the result will show up in the panel with red text. You can view where the clash is occurring by double clicking on the copied result in question and this will take you to that appointment on the diary.

If you are not happy with the copy results or you have made a mistake in the block copy process you can click the **Undo Copy** button. This will then remove all appointments that had been created. If you happen to close the panel down before you do this, then you will be unable to use the Undo Copy feature for the last copied appointments.

Deleting Blocked Booked Appointments

If you wish to delete appointments that have been blocked booked and there are too many to delete them manually then please follow the steps below.

WARNING! It is highly recommended that you back up the database before you proceed.

1) Click the blue link in the diary "**Switch to Grid View**" (left of the Diary Options button)
2) Click the **Search** button
3) Click the **Display All Records** button (This is between the Search and Refresh buttons)
4) Click **Grid Options**
5) Click **Toggle Grid Filtering** (A new line will appear just below the column headers)
6) Type the description of your appointment into the line just below the **Description** column header
7) You can do the same on any of the other columns you may wish to filter on i.e. "Staff Name"
8) After you have filtered out the unwanted appointments, left click on one of the appointments and press the **Ctrl** and **A** keys together
9) Right click on one of the records lines and select **Delete Appointment**

This will delete all of the blocked booked appointments of this type.

Appointment Statuses

ClinicOffice allows you to define a list of appointment statuses. Typically, these would include such things as *Patient Arrived*, *Late Cancellation*, *Patient DNA (Did Not Arrive)* and *Completed*.

The easiest way to set the status of an appointment is to **right-click** on the desired appointment, select **Appointment Status** and then click on the new status, as shown on the screen to the right.

You can however edit the Appointment Status list to suit your own needs.

Q. Why should I use appointment statuses?

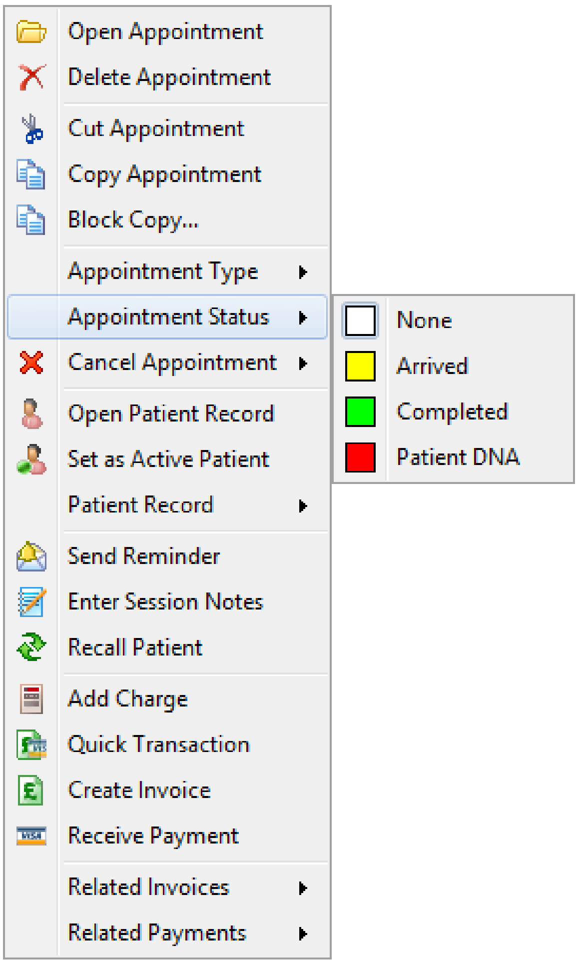
[1] One benefit is that whenever you update the status of an appointment, ClinicOffice can send a notification message to the appropriate Practitioner, informing them about the status change.

For example, imagine that Dr Smith's next patient telephones in to make a **Late Cancellation**. When the receptionist updates the appointment status, a message will appear on Dr Smith's screen (along with an audible alert) informing him of this. He then knows that he could spend a bit longer with his current patient, or that he's got a tea break coming up.

[2] Another benefit is that you can assign colours to the different statuses. This means that from just a quick glance at the appointment diary, you can see how many patients DNA, how any were treated, how many cancelled and so on…

As you can see, Appointment Statuses are a useful feature. For more information on how to configure Appointment Statuses, including how to send status changed messages and how to configure automatic patient flagging, please see the section "Working Types and Categories".

Setting the Appointment Status



Cancelling Appointments

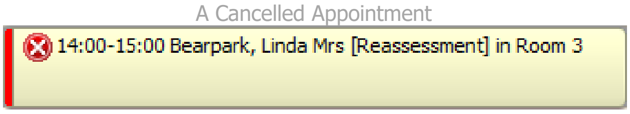
Closely allied to appointment statuses is the Cancel Appointment feature. A cancelled appointment status is basically like a normal appointment status but what makes it different from a normal appointment status is that it specifically tells ClinicOffice that an appointment has been cancelled.

The cancelled status can be assigned to an appointment status via the **View** menu -> **Types and Categories** -> **Appointment Statuses**. It is from this screen that the Cancelled Status check box is located. By ticking this you are telling ClinicOffice that this appointment status is a cancellation type status. When you tick it, the status will appear under the Cancel Appointment section of the right click menu on an appointment in the diary.

You can set the cancelled status up so that when assigned to an appointment the appointment disappears on the diary. To do this again you would go to the View menu -> Types and Categories -> Appointment Statuses. From here there is a check box called "**Hide in Diary**", when ticked this will hide the appointment on the diary.

An appointment that has a cancelled status is still there on the diary, it is just hidden. This means that you can book an appointment in its place if you wish to. You can however show a hidden cancelled appointment by clicking on the **Diary Options** on the Diary and ticking the option "**Show hidden (cancelled) appointments**". The cancelled appointment(s) will look like the example below.

A Cancelled Appointment



Generally, we would recommend that you hide cancelled appointments so that your diary is clutter free. There might be occasions though when you would like some cancelled appointments to be hidden and others to be displayed. For example, you might want an appointment that has been cancelled in advance to be hidden, this way you can still book in appointment. However, if someone called at the last minute to cancel their appointment and the appointment is then hidden you might look back on the diary and wonder why that practitioner had a spare time slot and why no other appointment was booked. If the cancelled status such as Late Cancellation is set so that it does not hide the appointment, you will be able to see that the appointment was cancelled late and hence why no other appointment was booked.

In brief the benefits of using the cancelled feature are: -

- Cancelled appointments don't clog up the diary (although you can choose to view them in the diary)
- Cancelled appointments are stored in the database so you can see them in a patient's appointment history
- A cancelled status makes it easier for reporting; it is easier to distinguish the difference between an appointment status that is a cancelled status and a normal status
- You can still create invoices for that cancelled appointment direct from the diary
- If it is a mistake you can "un-cancel" an appointment easily by right-clicking on it again and simply changing the appointment Status

Appointment Types

Appointment types are used to define the form of treatment that a patient is having for a particular visit. You can assign an appointment type to an appointment by right clicking on the appointment in the diary and selecting the appointment type. Alternatively, you can assign the appointment type within the appointment itself.

The benefits of using appointment types are listed below.

1. It is a quick way to identify what type of appointments are being treated
2. You can colour code the appointment making it easier to see what type of appointments are being treated
3. You can specify a default length of time for an appointment type
4. You can allocate a default charge amount for an appointment type

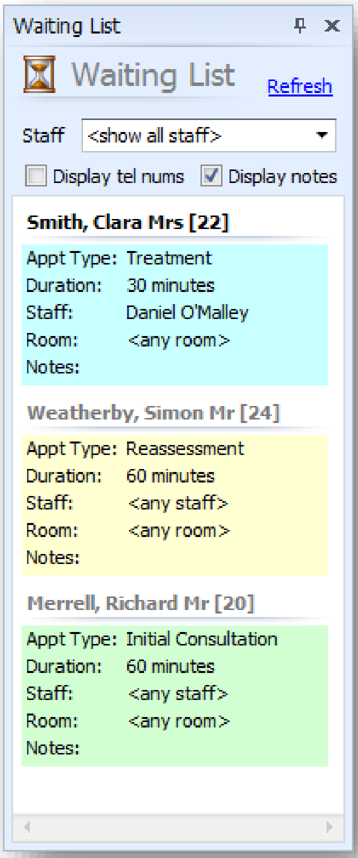
When creating a new appointment if you have a default length of time specified for the appointment type, ClinicOffice will remind the user that the appointment should be 'x' number of minutes if they have created the appointment with a different time range. For example, if a Treatment should be 30 minutes and the appointment was created for 15 minutes, when the user goes to save the appointment ClinicOffice will offer to change it to 30 minutes. They can however select 15 minutes it is meant to be 15 minutes in that instance.

For more information on how to create new appointment types, assigning colour codes, default time lengths and default charge amounts please see the sections "Working with Types and Categories", "The Appointment Type Editor" and "Creating a New Appointment Type".

The Waiting List

The Waiting List is located at the right-hand side of the Appointment Diary and it comes in the form of a tab. With the Waiting List you can keep a track on patients who are awaiting an appointment.

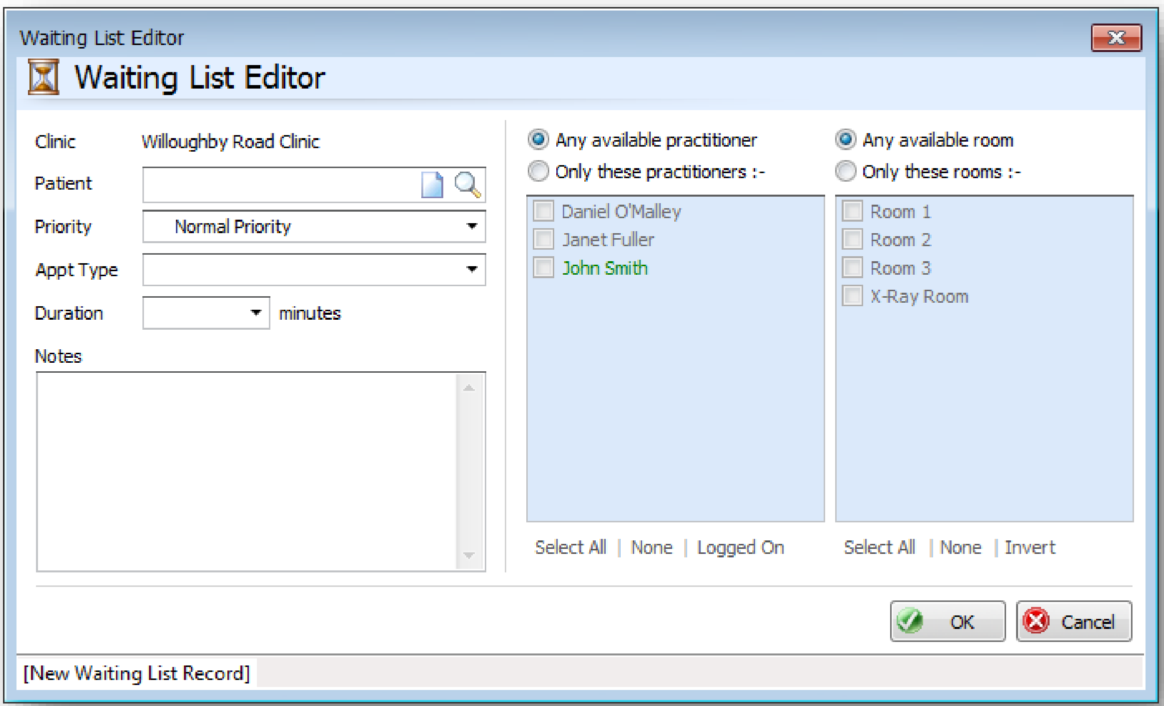
Waiting List



To add patients to the Waiting List, follow the instructions below: -

- Right-click on the waiting list and click **NEW.** The following window will appear.

Waiting List Editor



- In the **Patient** field select the patient is you wish to add to the list.
- In the **Priority** field select the importance of the appointment (how soon it needs to be done).
- Select the appointment type and duration. If you wish you can add some extra notes.
- You can also specify the practitioner and room.
- Now click **OK**

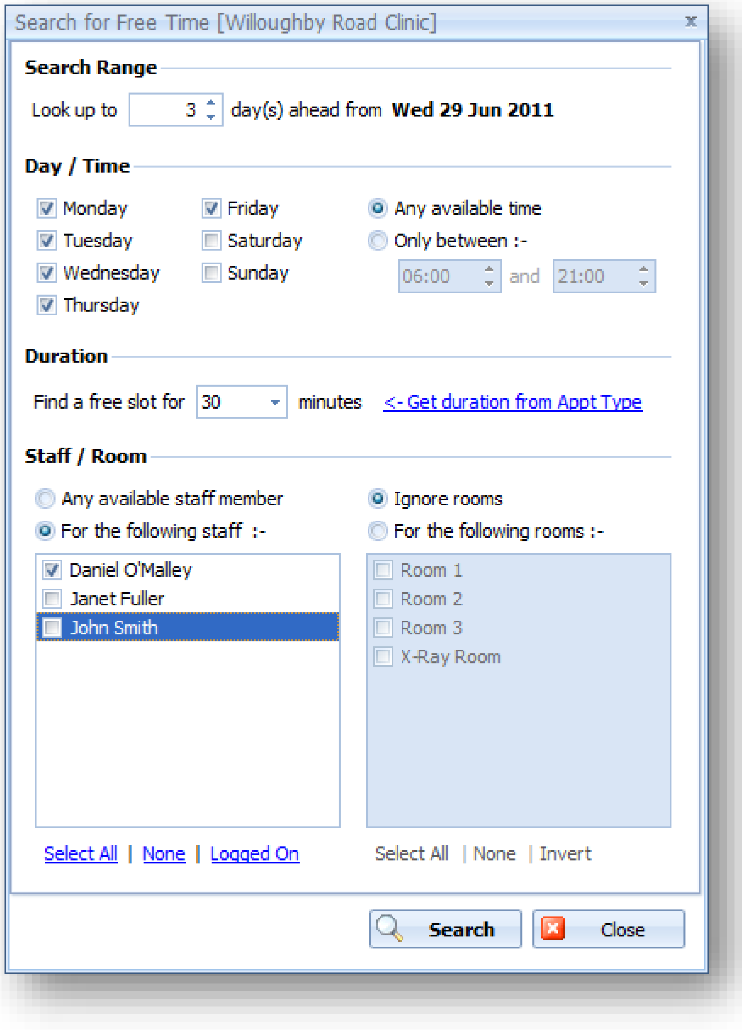
You will now see the patient you have selected in the Waiting List. Once you find a free slot in the diary either by browsing it or doing a diary search you can then drag and drop the patient from the Waiting List into that free slot.

If you have a long list of patients that are waiting, you can sort them according to staff member (using the **Staff** field). You can display the notes you have made by ticking **Display Notes**. The waiting list also gives you the option to **Auto refresh** which is handy when you have more than one user using it at a time.

Searching the Diary for Free Time

ClinicOffice v5 has a facility to help you automatically search the diary for free time slots. You may find that most of the time, a cursory glance at the diary is all that's needed to see where there are free appointment slots.
However, if your clinic is particularly busy and you're finding it difficult to manually locate free time slots in the diary, then the Search for Free Time feature should be able to help.
To access this feature, click the **SEARCH** button at the top of the diary (or under the calendar on the right of the screen)

Search for Free Time



Search for Free Time – Search Options screen

This is a 2-step process– the Search Options and the Search Results.
Here is an explanation of the search options that you can specify: -

Search Range

Look up to x number of days ahead; this is where you choose how far in the future you would like to look.

Day / Time

Nominate which days you would like the appointment to be on and if necessary which time.
Any available time – the search will look for any time within a day.
Only between – Specify between two times for the day(s).

Duration

How long the appointment needs to be; you can either enter it manually or click **Get Duration from Appt Type** to allow the software to enter it for you.

Staff / Room

Enter the staff members or rooms that the appointment would be for. You may choose any staff member and no particular rooms.
Once you have entered the desired criteria for your search, simply click the **SEARCH** button.

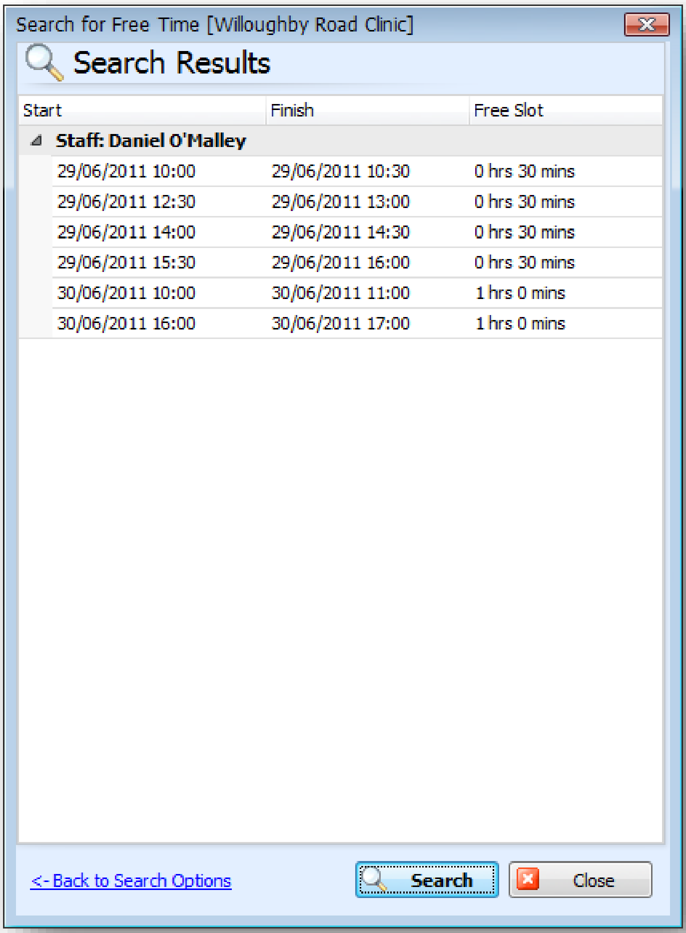
Search for Free Time – Search Results screen

The screenshot to the right shows the results from our search. Notice that it categorises the results by staff members (and then by room if we had selected to search by room too). Clicking on one of the results in the list will automatically move the diary to the selected time slot. If you double-click on one of the results it will open the Appointment Editor with the desired information already entered.

Q. What if there are no results?
Then click **Back to Search Options** to revise the search options. Perhaps try searching over a longer period or try a different staff member (perhaps any staff member). Just click the Search button again and ClinicOffice will show you the revised search results.

Q. I've found the free slot I want to use – what now?
Simply create an Appointment in the usual fashion by either double or right-clicking on the time you want. Please see the topic on "The Appointment Editor" for more information on how to use this screen.

Time Search Results



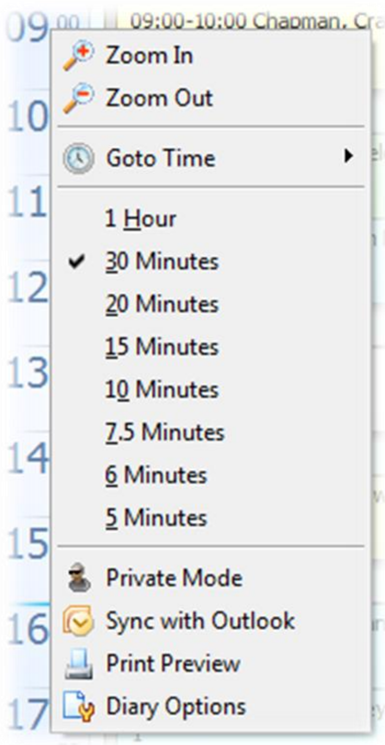
Setting the Time Slot Interval

The Time Slot Interval is the length of time in each appointment slot in the diary. You can change the time slot interval on any occasion.

The easiest way to change the time intervals is by **right-clicking** on the time ruler on the left-hand side of the diary. Then simply select the chosen interval length.

You may also change the time intervals from the Appointment Diary Options.

Setting Diary Intervals



Other Right-Click Features

You may **Zoom In** and **Zoom Out** on the diary by right-clicking on the time ruler. This does not change the time interval, but it does stretch/shrink your view of the diary, making things either more manageable or easier to view.

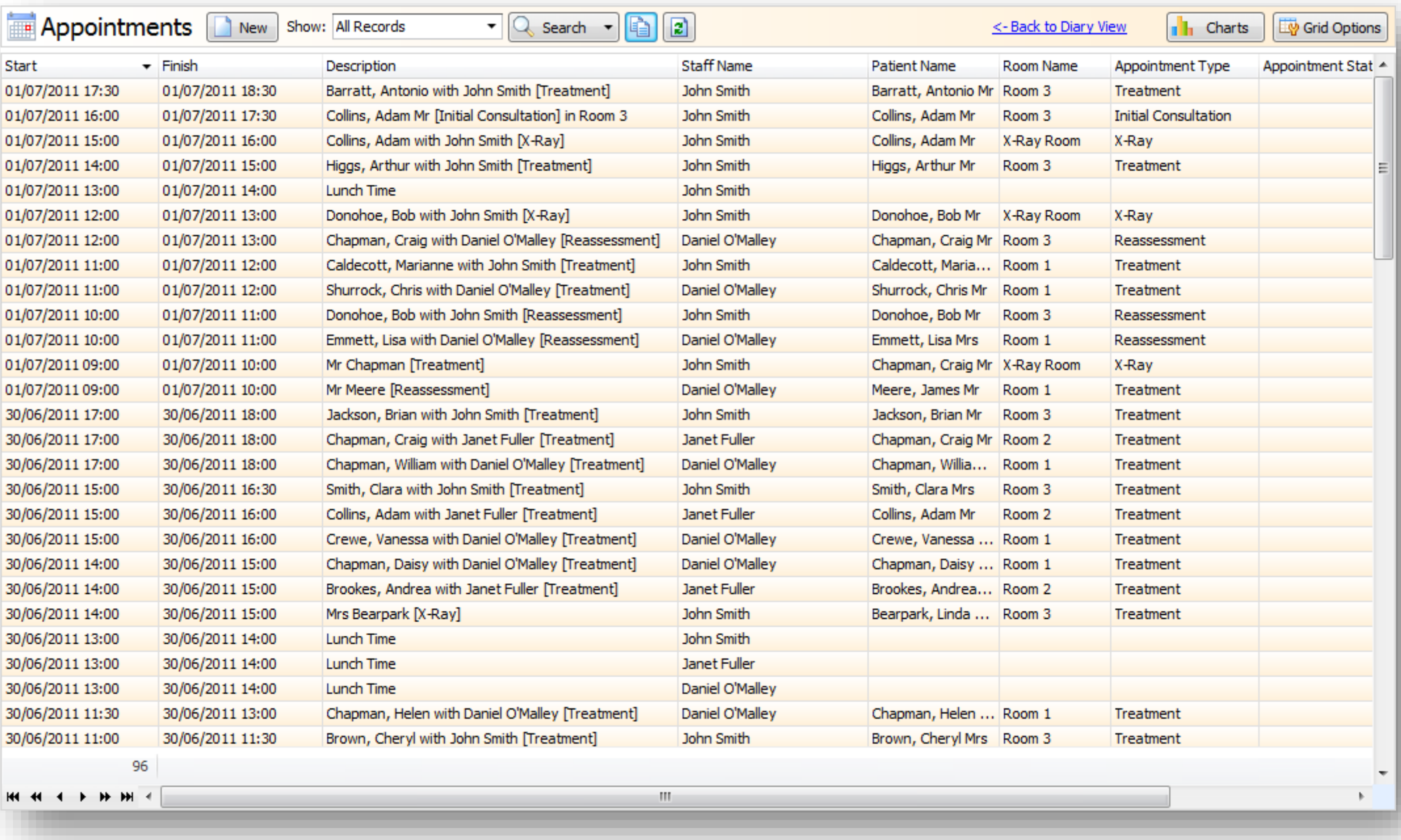
Using the **Goto Time** you can select a date to jump to. This is could be used instead of scrolling up and down the diary using your mouse wheel.

When you select the **Private Mode** feature via this menu, it will change the display text on the appointments to say **[Booked]**. This feature can be used if you wish to show a patient the diary to see what available times you have on a day without showing them the names or details of other patients. You can switch off Private Mode by selecting it again from the menu.

View Diary as a Grid

ClinicOffice v5 gives you the option to view the diary as a grid. This is very handy as you can see a wider range of appointments in a list. You can access this by clicking on the link which says **Switch to Grid View**; this is located in the top right-hand corner of the diary, next to the **DIARY OPTIONS** button. To change it back, click on the link **Back to Diary View** (located in the same area).

Diary Grid View



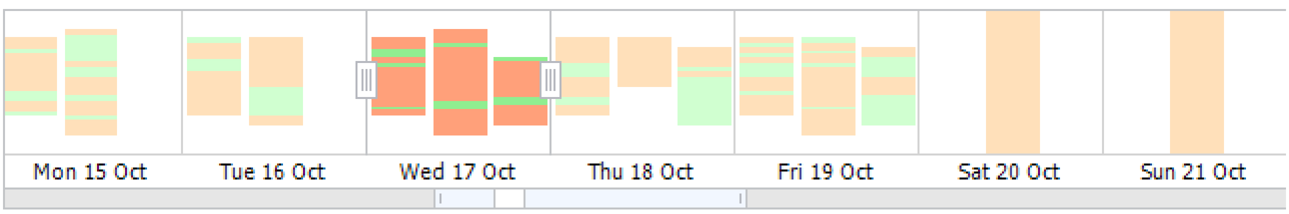
Start	Finish	Description	Staff Name	Patient Name	Room Name	Appointment Type	Appointment Stat
01/07/2011 17:30	01/07/2011 18:30	Barratt, Antonio with John Smith [Treatment]	John Smith	Barratt, Antonio Mr	Room 3	Treatment	
01/07/2011 16:00	01/07/2011 17:30	Collins, Adam Mr [Initial Consultation] in Room 3	John Smith	Collins, Adam Mr	Room 3	Initial Consultation	
01/07/2011 15:00	01/07/2011 16:00	Collins, Adam with John Smith [X-Ray]	John Smith	Collins, Adam Mr	X-Ray Room	X-Ray	
01/07/2011 14:00	01/07/2011 15:00	Higgs, Arthur with John Smith [Treatment]	John Smith	Higgs, Arthur Mr	Room 3	Treatment	
01/07/2011 13:00	01/07/2011 14:00	Lunch Time	John Smith				
01/07/2011 12:00	01/07/2011 13:00	Donohoe, Bob with John Smith [X-Ray]	John Smith	Donohoe, Bob Mr	X-Ray Room	X-Ray	
01/07/2011 12:00	01/07/2011 13:00	Chapman, Craig with Daniel O'Malley [Reassessment]	Daniel O'Malley	Chapman, Craig Mr	Room 3	Reassessment	
01/07/2011 11:00	01/07/2011 12:00	Caldecott, Marianne with John Smith [Treatment]	John Smith	Caldecott, Maria…	Room 1	Treatment	
01/07/2011 11:00	01/07/2011 12:00	Shurrock, Chris with Daniel O'Malley [Treatment]	Daniel O'Malley	Shurrock, Chris Mr	Room 1	Treatment	
01/07/2011 10:00	01/07/2011 11:00	Donohoe, Bob with John Smith [Reassessment]	John Smith	Donohoe, Bob Mr	Room 3	Reassessment	
01/07/2011 10:00	01/07/2011 11:00	Emmett, Lisa with Daniel O'Malley [Reassessment]	Daniel O'Malley	Emmett, Lisa Mrs	Room 1	Reassessment	
01/07/2011 09:00	01/07/2011 10:00	Mr Chapman [Treatment]	John Smith	Chapman, Craig Mr	X-Ray Room	X-Ray	
01/07/2011 09:00	01/07/2011 10:00	Mr Meere [Reassessment]	Daniel O'Malley	Meere, James Mr	Room 1	Treatment	
30/06/2011 17:00	30/06/2011 18:00	Jackson, Brian with John Smith [Treatment]	John Smith	Jackson, Brian Mr	Room 3	Treatment	
30/06/2011 17:00	30/06/2011 18:00	Chapman, Craig with Janet Fuller [Treatment]	Janet Fuller	Chapman, Craig Mr	Room 2	Treatment	
30/06/2011 17:00	30/06/2011 18:00	Chapman, William with Daniel O'Malley [Treatment]	Daniel O'Malley	Chapman, Willia…	Room 1	Treatment	
30/06/2011 15:00	30/06/2011 16:30	Smith, Clara with John Smith [Treatment]	John Smith	Smith, Clara Mrs	Room 3	Treatment	
30/06/2011 15:00	30/06/2011 16:00	Collins, Adam with Janet Fuller [Treatment]	Janet Fuller	Collins, Adam Mr	Room 2	Treatment	
30/06/2011 15:00	30/06/2011 16:00	Crewe, Vanessa with Daniel O'Malley [Treatment]	Daniel O'Malley	Crewe, Vanessa …	Room 1	Treatment	
30/06/2011 14:00	30/06/2011 15:00	Chapman, Daisy with Daniel O'Malley [Treatment]	Daniel O'Malley	Chapman, Daisy …	Room 1	Treatment	
30/06/2011 14:00	30/06/2011 15:00	Brookes, Andrea with Janet Fuller [Treatment]	Janet Fuller	Brookes, Andrea…	Room 2	Treatment	
30/06/2011 14:00	30/06/2011 15:00	Mrs Bearpark [X-Ray]	John Smith	Bearpark, Linda …	Room 3	Treatment	
30/06/2011 13:00	30/06/2011 14:00	Lunch Time	John Smith				
30/06/2011 13:00	30/06/2011 14:00	Lunch Time	Janet Fuller				
30/06/2011 13:00	30/06/2011 14:00	Lunch Time	Daniel O'Malley				
30/06/2011 11:30	30/06/2011 13:00	Chapman, Helen with Daniel O'Malley [Treatment]	Daniel O'Malley	Chapman, Helen …	Room 1	Treatment	
30/06/2011 11:00	30/06/2011 11:30	Brown, Cheryl with John Smith [Treatment]	John Smith	Brown, Cheryl Mrs	Room 3	Treatment	
96							

This grid works in the same manner to the other grids in ClinicOffice, with the same options available. See the section "Working with ClinicOffice Grids."

Diary Timeline

The diary timeline sits at the bottom of your diary screen. The idea of the timeline is that it gives you a small preview of your calendar range, so that you can see if there are any free available time slots.

Diary Timeline



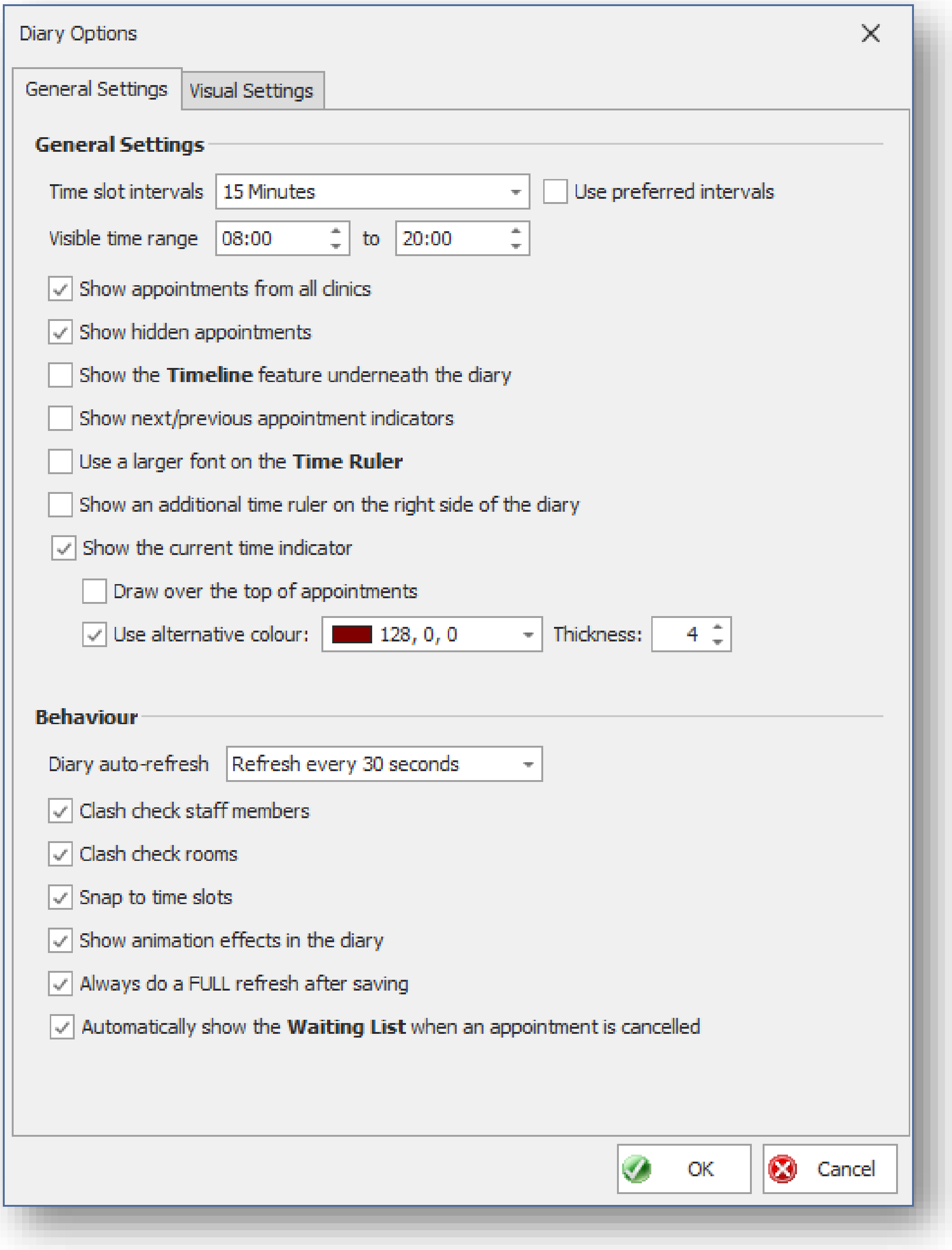
If you cannot see the diary timeline, you can open it up by going into the **Diary Options** and ticking the box **Show the Timeline underneath the diary**. To use the timeline, you will also need your date loading mode set to **Whole calendar range**. You can do this via the Diary Options under the section **Behaviour**.

As mentioned the timeline will preview the calendar range that you have selected. If you have the months of October and November selected on the Diary Navigator, then the timeline will preview those months. You can use the scroll bar to see different days. The day that you are looking at on the diary will be the day highlighted on the timeline. If you click on another day on the timeline, this will change the day you are looking at on the diary. White represents non-working hours, orange means that an appointment has already been booked and green represents that there is a free time slot.

Diary Options

The diary options are accessible by clicking on the **Diary Options** button which can be found at the top right of the diary screen. The Diary Options has two parts: General Settings and Visual Settings.

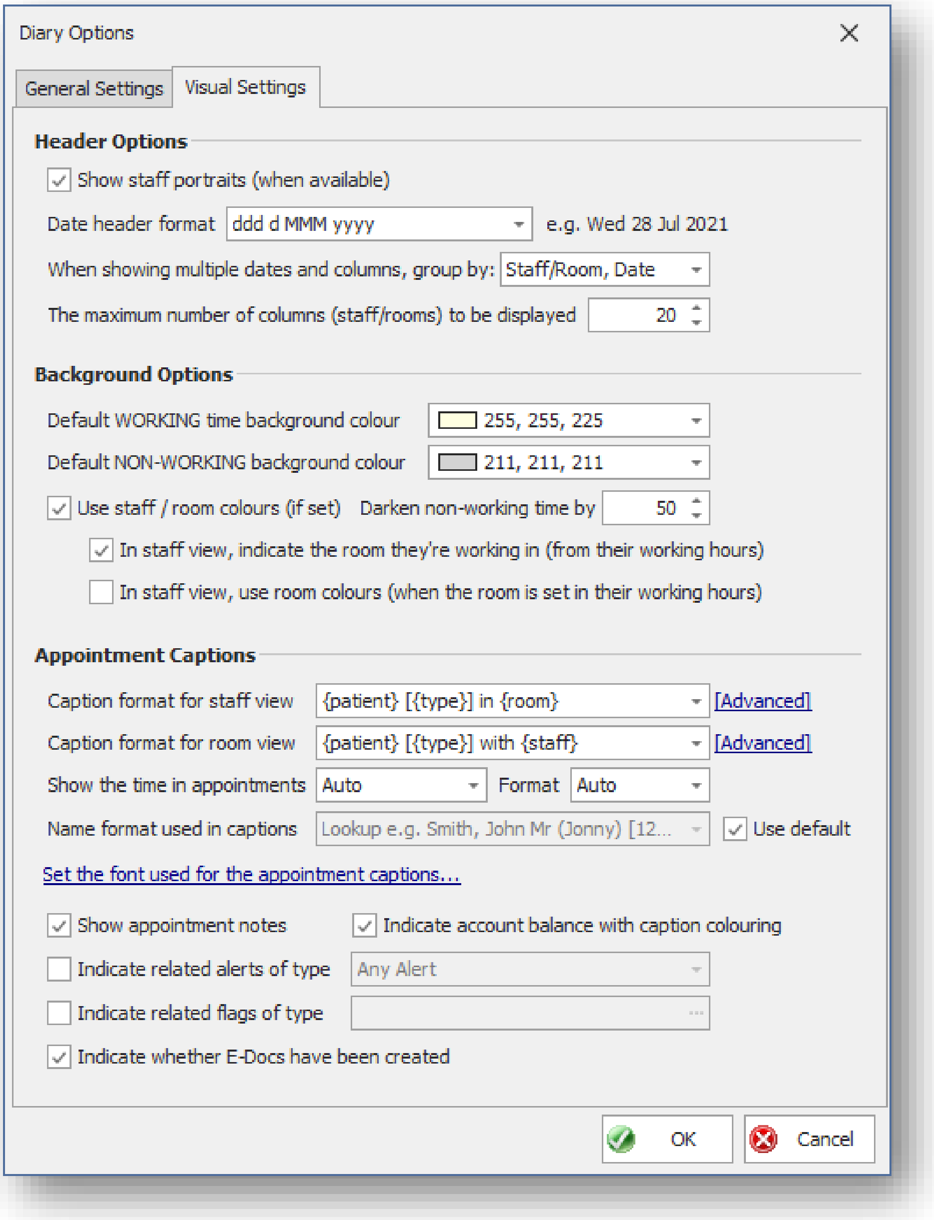
Diary Options General Settings



General Settings

General Settings	
Time slot intervals	This changes the default appointment length when viewing the diary.
Use preferred intervals	When ticked the diary's time slot intervals will change according to the clinic's **Default diary interval** setting (this is changed in the Clinic Settings).
Visible time range [time] to [time]	This allows you to nominate the amount of time viewable in the diary.
Show hidden appointments	When ticked appointments set with appointment status that hides them in the diary will be displayed instead.

Show appointments from all clinics	This is applicable if you have more than one clinic in your database. This displays all the appointments that a practitioner has at other clinics as well as the clinic you are viewing at the present time.
Show the Timeline underneath the diary	This will display the timeline at the bottom of the diary. The timeline provides you with a preview of working hours and booked appointments for each day of a month.
Show next/previous appointment indicators	This toggles the buttons to the right and left side of the diary that will take you to the next day that has appointments booked on.
Show an additional time ruler on the RIGHT side of the diary	Displays the time ruler on the right-hand side of the diary in addition to the left-hand side.
Use a larger font on the time ruler	Increases the font size of the time ruler.
Show the current time indicator	When ticked this will display a visible line on your diary that reflects the current time in the day.
Draw over the top of appointments	If this is ticked along with the above option, the time indicator will appear in front of appointments instead of behind as it does by default.
Use alternative colour	You can select a custom colour for the time indicator to make it stand out more. You can also increase the line's thickness for the same purpose.
Behaviour	
Diary auto-refresh	Here you can choose whether you would like the diary to refresh automatically* or manually.
Clash check staff members or rooms	When either of these options are switched on ClinicOffice will check any clashes that might occur when an appointment is being created or moved to an area within the diary. If a clash is detected, you will receive a message informing you of the conflict.
Snap to time slots	The snap to time slots toggles between making an appointment fit the time slot intervals and displaying the appointment to its actual length in time within the diary print preview.
Show animation effects in the diary*	A sliding animation is added to the diary columns when you select a different day via the diary navigation.
Always do a FULL refresh after saving*	If this is ticked then every time you save and close a document the diary will automatically refresh.
Automatically show the Waiting List when an appointment is cancelled	When this option is ticked if an appointment is set to a cancelled status then the Waiting List will automatically appear on the right hand side as a sidebar, allowing you to add the patient to it.



Visual Settings

Header Options	
Show staff portraits (when available)	This shows or hides the practitioner's portrait which is located above the practitioner's name in the diary.
Date header format	Changes the format of the date that is displayed at the top of the diary columns. An example of how the format will be displayed is given next to the selection field.
When showing multiple dates and staff/rooms	If you have two or more practitioners selected and you select multiple days to be viewed the diary by default will display the diary by staff first then display each day under the staff column. With this setting you can alter it so that the diary will be displayed by date first with each staff member appearing under each day.
The maximum number of columns (staff/rooms) to be displayed	Limits the maximum number of staff or rooms loaded and displayed on the diary.
Background Options	
Default WORKING time background colour	This will be the default background colour for a practitioner's or room's diary during their working hours. When "**Use staff/room colours**" is ticked, the colour that a staff member has assigned will be displayed instead.

Default NON-WORKING time	This will be the default background colour for a practitioner's diary during non-working hours. When "**Use staff colours**" is ticked, the colour that a staff member has assigned will be displayed instead.
Use staff/room colours (if set)	When this is ticked the colours that have been assigned to a practitioner or room will appear instead of the default working/non-working time colours under the Diary Options.
Darken non-working time by	Darkens the custom staff/room hours for the non-working hour segments of the diary.
In staff view, indicate the room they're working in (from their working hours)	If a default room or rooms has been assigned to the practitioner, under their working hours, then the room name will appear on the background of the diary when this option is ticked.
In staff view, use room colours (when the room is set in their working hours)	Like the previous option if a default room or rooms has been assigned to the practitioner, then when this option is ticked the background colour will default to the room colour instead of the practitioner's default diary colour.
Appointment Captions	
Caption format for staff /room view	This is where you choose how you want the text information on the appointment to appear. You can choose four different fields to show in here these are patient name {patient}, appointment type {type}, room {room}, clinic {clinic}, status {status}, staff {staff}. You can include these in any order as well as the ones we provide (e.g. {patient} is visiting {clinic} in {room} having a {type}).
Show the time in appointments	The option 'auto' will display the time. So if the appointment only fills half the time slot, you can then see from what exact times. You can choose between **Always** on and **Never**.
Format	This only applies when looking at week view and will change the viewable times on the appointment from **Clock** and **Text**.
Name format used in captions	Allows you to choose a different name format. This is disabled if the **Use default name format** is ticked.
Use default	Sets the patient's name format to the default name format specified in the User Settings under the main Program Settings.
Set the font used for the appointment captions…	This enables you to change the font style and size that is being used within the diary.
Show appointment notes	When this is ticked, and you have data in the notes field of an appointment then the notes will be shown under the appointment caption.
Indicate account balance with caption colouring	When ticked the text of the appointment for the patient whose account balance is negative will appear in red and when the patient has a positive balance their appointment text will appear in green. If neither the text will appear in black.
Indicate related alerts of type*	When ticked this will display a small red-light icon on appointments that either have an alerted flag attached to the appointment or to the patient of the appointment. By default, this will display all alert types but you can select from the drop down menu to display either Admin/General Alert or Clinical Alert.
Indicate related flags of type*	When ticked this will display a flag icon on appointments that either have a flag attached to the appointment or to the patient of the appointment. The colour will vary depending on the colour of flag that has been assigned. If more than one flag type has been assigned, then these will also be displayed on the appointment. By default, this will display all flag types, but you can select certain flag types via the field box.
Indicate whether E-Docs have been created*	When ticked a small cloud paper icon appears when an E-Document has been created via the appointment for the patient.

** This can have an impact on the performance of the diary. This will be less noticeable on a stand-alone computer or when running over a fast network, but if you have a slow network or if you're running the program over a VPN, then turning these options off will improve performance.*

Financial Commands

When you right-click on an appointment you have a set of financial commands that are displayed.

Financial Commands on Appointment Right-Click Menu

Add Charge allows you to raise a charge for the patient without invoicing them.

Quick Transaction allows you to quickly bill the patient & take payment.

Create Invoice creates a new invoice for this appointment.

Receive Payment takes a payment from the person associated with this appointment.

This menu also gives us a handy link to any related invoice or payments that have already been created for this appointment.

The only other item on the diary right-click menu which we have not yet mentioned is the **Session Notes** item. Clicking this allows us to create new Clinical Session Notes (or view existing notes) relating to this appointment.

Q. What's the benefit of using these right-click features?

As you may have gathered, ClinicOffice has been designed so that most features are neatly linked in to the diary. For example, if you create an invoice from an appointment in the diary then ClinicOffice will create a link between the selected appointment and the invoice. Or if you create some Clinical Session Notes from an appointment, then once again ClinicOffice will know to link the session notes to the appointment.

In both these cases, you could just create an invoice or session note from the Patient Editor or by going to the invoices section of the program and clicking New Invoice – and there's certainly nothing wrong with that. But linking invoices or sessions to an appointment has two benefits: -

[1] Ease of Navigation

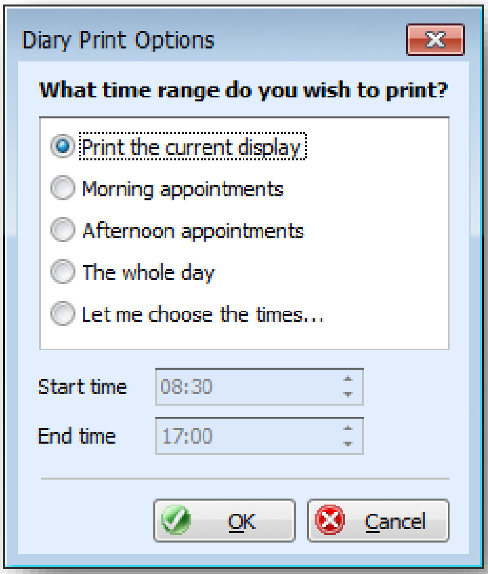
By right-clicking on the appointment in the future, you have an audit trail and you can follow the links to any invoices/session notes which were created for that appointment.

[2] Automatic Field Population

When you create an invoice or session notes from an appointment, ClinicOffice already knows who the patient is, who the staff member is, which room it took place in, what type of appointment it was. All of this information is then automatically filled in for you in the new invoice and session notes.

Printing the Diary

Printing the diary is a straight forward process; all you need to do is right-click on an empty area within the diary and select **Print Preview**. The Diary Print Options will now appear.

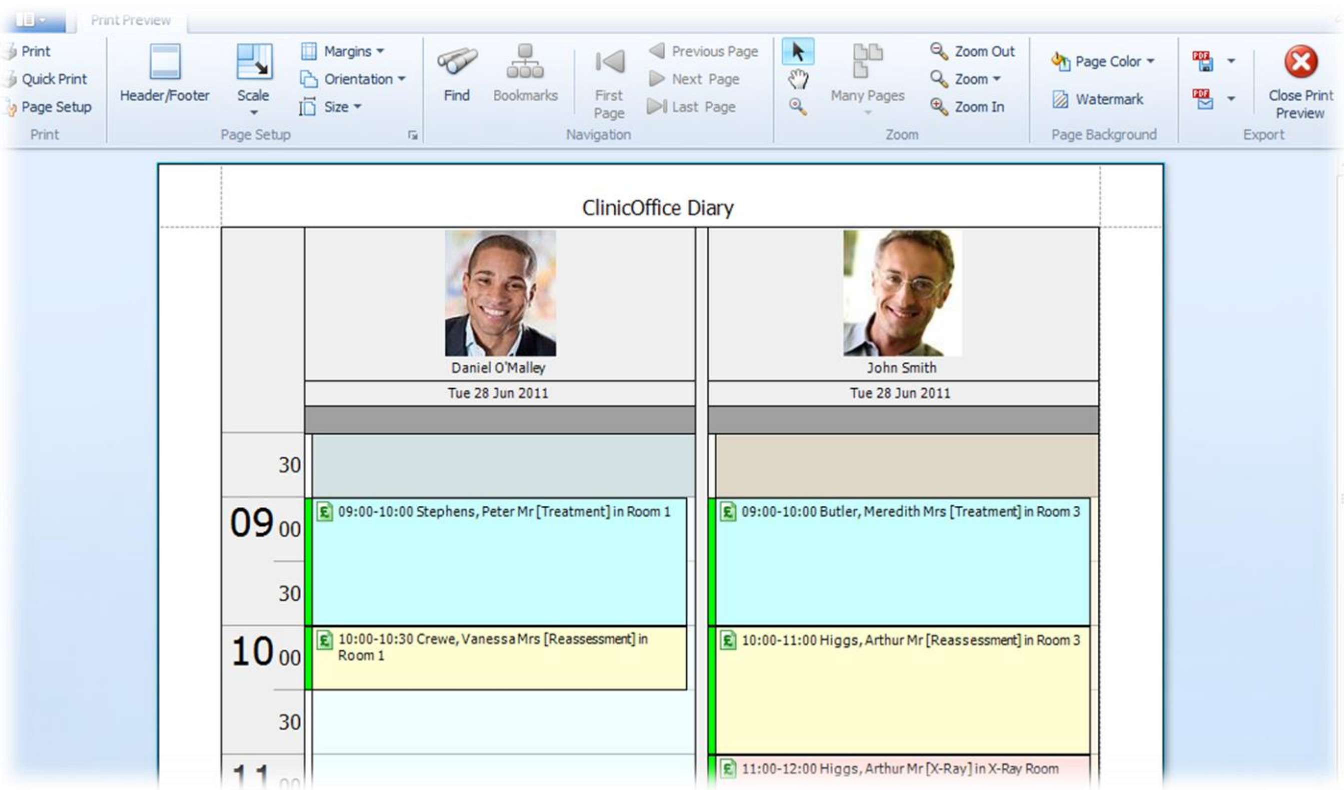


The Diary Print Options provides you with 5 print range options.

Print the current display	When this is selected the print range will only be the times that you have displayed at that exact time. You will notice that the **Start time** and **End time** fields are greyed out and the values have been entered in automatically.
Morning appointments	This option will print out the morning only. It will select the default diary **Start time** (governed by the Diary Options), but you can enter in an **End time.** This is recommended if you cannot fit the entire diary onto one page.
Afternoon appointments	This option will print out the afternoon only. You can alter the **Start time**, but the **End time** will default to the last time on the diary (also governed by the Diary Options).
The whole day	This will print off the entire day of the diary. The **Start time** and **End Time** will be the display times from the Diary Options.
Let me choose the times…	This will allow you to select the times that are to be displayed in the print.

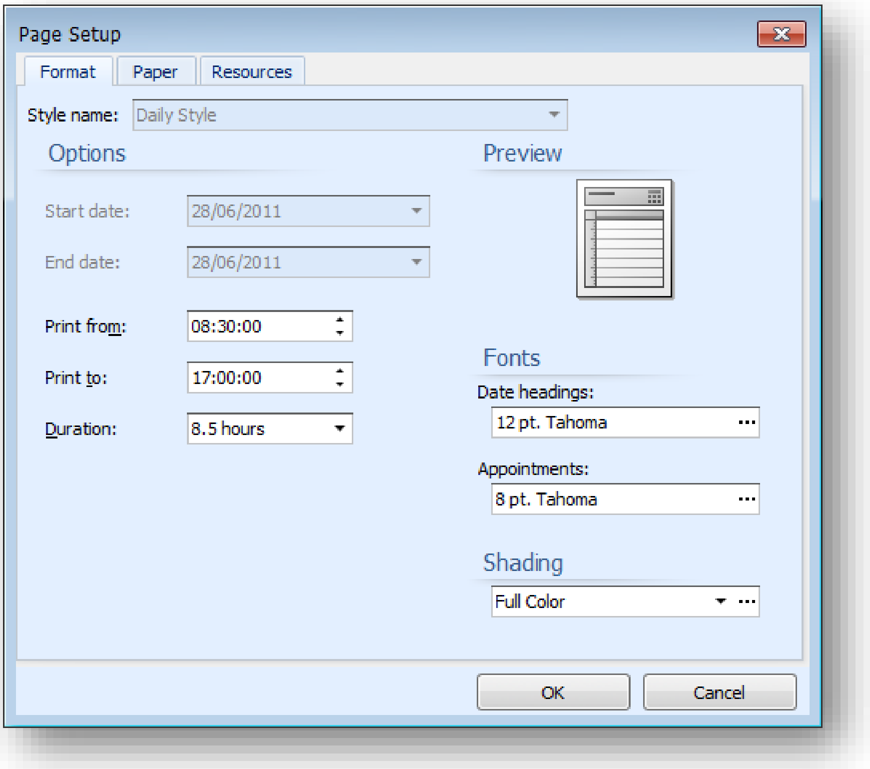
Once you have selected the print range and pressed okay the diary's Print Preview window will open:-

Diary Print Preview



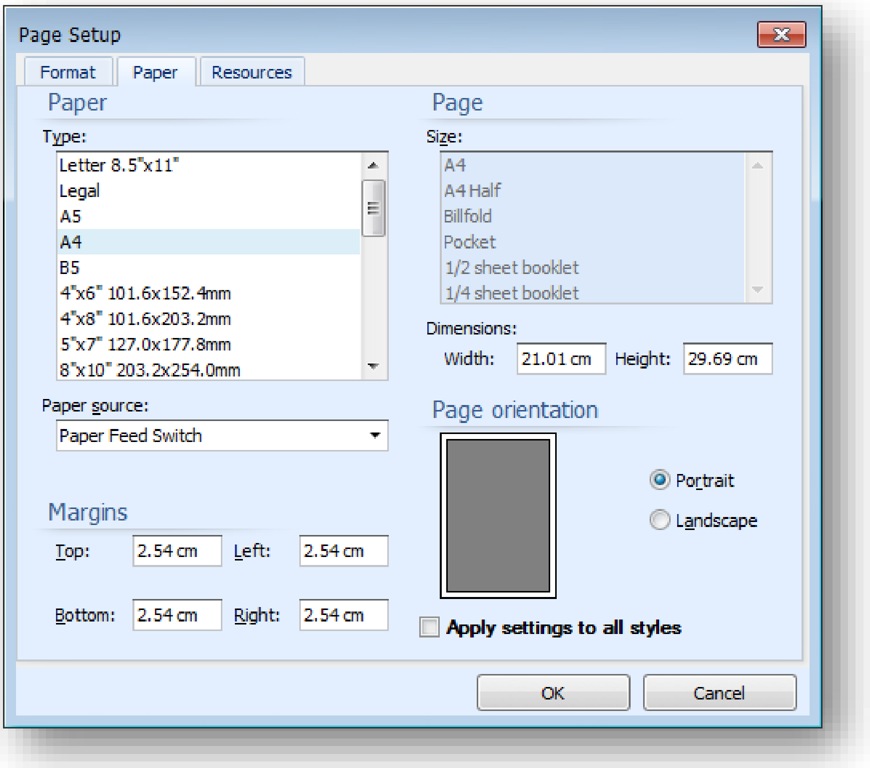
When you are printing from the diary there are some specific options available to you. You can access these from the Page Setup button. Once clicked, a screen will appear that will have 3 tabs as shown below.

Printer Option Format Tab



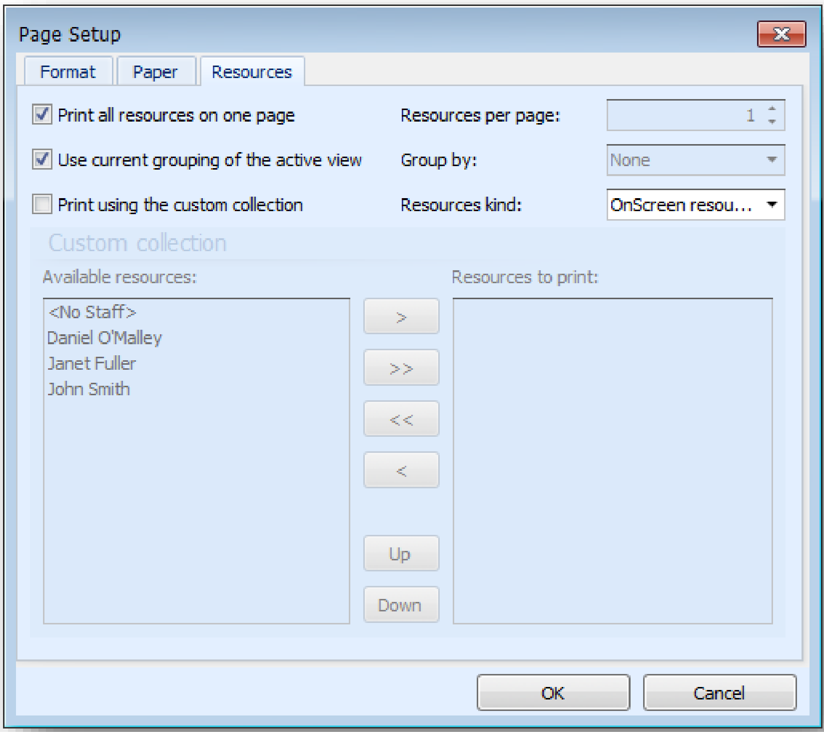
Here you can change the start and end date/time of the diary printout, if you were not happy with your original range, along with the size of the text and the shading of colour you wish to have.

Printer Options Paper Tab



Here you can change the paper size and source if applicable along with margin sizes and paper orientation.

Printer Options Resources Tab



The Resources tab allows you more control over the exact diaries you would like to print and the order that you would like to print them.

Once you have made the necessary changes click the **PRINT** button for a quick print. If you wish to choose the printer you will print from, click **OK** and then press the **PRINT** button on the ribbon bar instead.

For a detailed explanation of printing in ClinicOffice please see the section "Printing".

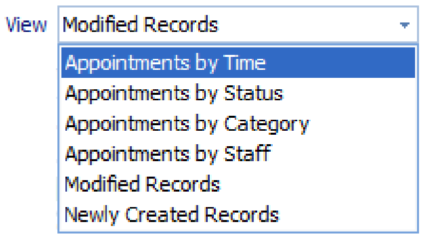
Today's Clinic

At times there might be too much going on in a day to keep track of things. At such times it would be easier to summarise certain events within that day, so that it makes navigating ClinicOffice easier. This is where the Today's Clinic comes in hand. The Today's Clinic can be located down the left-hand side of ClinicOffice, stored as a tab. If you keep your mouse cursor over the tab it will open as a side panel.

Today's Clinic Side Panel

Like all side panels in ClinicOffice you can pin it by pressing the **PIN** icon (located top right, next to the exit). The Today's Clinic has different views, allowing you to see different sets of data for the day. By left clicking on the **View** field you will be presented with a drop-down menu.

Today's Clinic View Menu



This is what each view does:

Appointment by Time	Categorises all appointments by the hour.
Appointment by Status	Keeps track of the appointments statuses during the day and any changes that occur.

Appointments by Category	Categorises all appointments by their type. This only includes appointments which have a patient assigned to them.
Appointments by Staff	Categorises all appointments by the staff member. Like before this only includes appointments which have a patient assigned to them.
Modified Records	This takes note of any changes made to a patient, contact; invoice, payment; credit, refund; appointment, case and session record, during the day.
Newly Created Records	Keeps track of any newly created records.

When you click on a record that is shown in the Today's Clinic it will open an editor. For example, if you are looking at Modified records and click on a patient's record, this will open the Patient Editor. This works the same for all Views apart from the Appointments. For example, if you are looking at Appointments by Staff and you click on an appointment, it will take you instead to its location on the diary (this is only if you are looking at the diary).

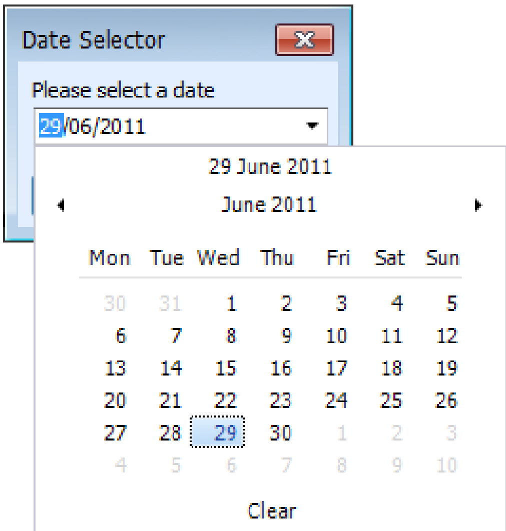
There are additional options for the Appointment Views; these can be accessed when you right-click on an appointment. You are not only given the option to open the Appointment, Patient Record or Clinic Notes but you can also change the appointment's status. There is also the option to print the Today's Clinic on the right click menu.

You also have the option to view only your records. To do this, simply tick the box which reads "**Only show my records**". This is helpful when you have hundreds of records displayed in the Today's Clinic and you wish to view only your appointments.

Throughout the day many changes will be made to the database and hence the Today's Clinic will need to be kept up to date. To do this, press the **REFRESH** button (next to the **View** menu). Another option is to set it up to auto refresh by ticking the box which says **Auto Refresh**. Please note that the auto refresh may affect the performance of ClinicOffice.

By default, the Today's Clinic will look at records that are on today's date, but you can change this by clicking the **Select Date** button. A small window will appear called "Date Selector". If you left click on the arrow inside the field, a calendar will appear allowing you to select the day you wish to view.

Date Selector Window



You can also left click on the field and enter the date manually; once selected press **OK**. You will now have a small yellow bar appearing close to the top of the Today's Clinic informing you of the day that you are looking at. If you left click on the message "Click for Today", it will take you back to today's date.

Working with Editors

Editors are used in ClinicOffice v5 to create, edit or view details for records of any type (patients, contacts, staff, invoices, payments, appointments etc.). All the editors share some common functionality, so it's the purpose of this topic to cover the common functionality to avoid needlessly repeating ourselves.

Each piece of information in an editor (for example "Firstname" or "Postcode" in the Patient Editor) is referred to as a **field**. ClinicOffice supports standard textboxes, memo fields; checkboxes, drop-down lists; date fields, patient/contact lookup fields; number and decimal fields. If the editor has a lot of fields, then it might be grouped into sections. Very often an editor might contain more than one page in the form of **Tabs**. For example, the Patient Editor has four main pages and four sub-groups.

You will notice the standard minimise, maximise, and close buttons towards the top right of most editors. This allows for you minimise and maximise these editors when you have to. So, for example, if you are recording some information on a patient's record and the telephone rings with someone wanting to book an appointment, you can minimise the patient editor and navigate to the diary. Later, you can bring that patient editor back up from the taskbar and continue where you left off from.

ClinicOffice does contain an additional feature called **Pin It!** The "Pin It!" button (located towards the top right of most editor ribbon bars) will allow for you to temporarily bookmark an editor. Once pinned, the editor can be accessed via the **My Pins** button located on the main **Home** menu. The benefit of this is that if you are working on a record and perhaps it is the end of the day but you need to store the record so that you can pick it up for the next day, you can just Pin It! When you close ClinicOffice and come in the next day you can open the record from the My Pins button and continue to work away on it. This could also be used as a way of reducing the number of screens that you have on display.

Navigating An Editor Using Keyboard Keys

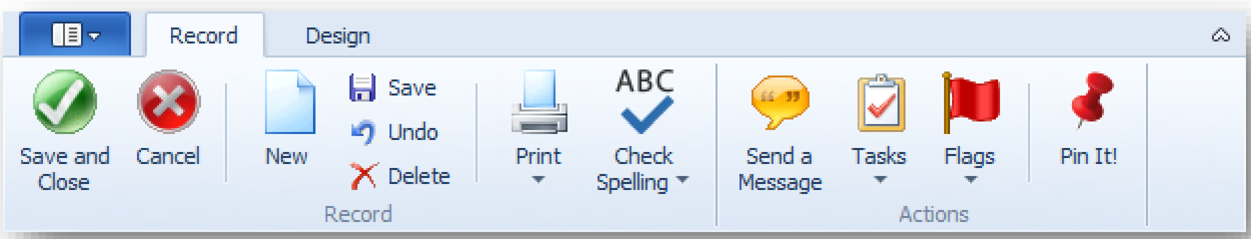
It may be useful to note the following keys which can be used to navigate between fields in the editors. These keys provide an alternative to using the mouse:-

Tab	Move to the next field in the editor
Shift + Tab	Move back to the previous field in the editor
Alt	Will allow you to activate one of the buttons on the current editor ribbon bar. For example, if you are in the Patient Editor and you press the Alt key small preview buttons will appear. It indicates that if you press the letter **A** then the menu will be presented, if you press **R** it will take you to the Record tab and if you press **D** it will take you to the design tab. From there you will be able to show the keys you can use to activate the other buttons. So if I press **Alt** and **R** keys and then the **D** and **U** keys, it will duplicate the patient record.

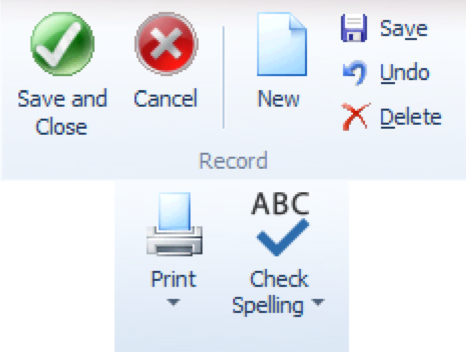
The Editor Ribbon Bar

The editors all have common functions on their ribbon bars:-

The Editor Ribbon Bar



These buttons have the following functions:

<table>
<tr><th colspan="2">Record Tab</th></tr>
<tr><td>


</td><td>

Save and Close

Saves any changes you made to the current record and then closes the editor.

Cancel

Ignores any changes made to this record and then closes the editor.

New

Creates a new record of this type.

Save

Saves any changes made (without closing the editor).

Undo

Undo any changes made since this record was last saved.

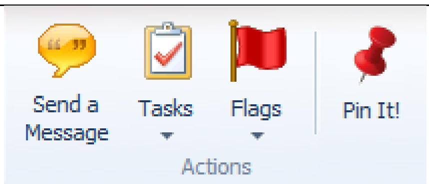
Delete

Deletes this record.

Print

Opens a dropdown menu allowing you to print documents relating to this record. Also gives you the option to print preview the details in this record.

Check Spelling

Will allow for a one-off or a constant spell check on any memo fields present within the Editor. You can also access the spell checker settings from here as well.
</td></tr>
<tr><td>


</td><td>

Send a Message

Will send a message to another user on your network with a link to this record.

Tasks

(Top Button) Creates a task linking to this record.

(Lower Button) Opens a dropdown menu with a list of tasks for this record.

Flags

(Top) Creates a flag linking to this record.

(Bottom) Shows a list of all current flags.

Pin It!

Adds this record to your list of Pinned records on the Home ribbon bar.
</td></tr>
</table>

<table>
<tr><th colspan="2">Design Tab</th></tr>
<tr>
<td>


</td>
<td>
Enter Design Mode
This allows you to alter the layout the editor.

Save Design
Only available when in design mode. Saves any changes made to the layout of the editor.

Edit Custom Field Lists
Only available when in design mode. Allows you to create your own custom lists and values for those lists. These can then be assigned to a list field.

Add Field
Only available when in design mode. Enables you to add custom fields to the current editor.

Script Editor
This requires knowledge of C# or VB.NET to be used. With this you can change the way in which the editor behaves.
</td>
</tr>
</table>

The Editor Status Bar

This is the bar which runs across the bottom of each editor.

The Editor Status Bar

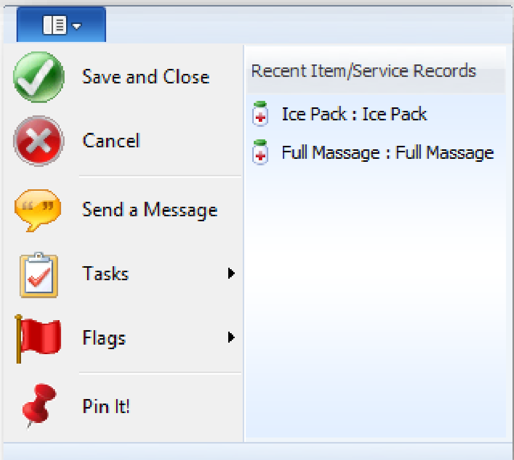
In addition to providing a size grip (at the bottom right) for the editors which can be resized, the status bar also lets you know who created the record and the date they created it, as well as who last updated it and the date this was done on.

If you have the Server or Hosted editions of ClinicOffice and the Audit Trail has been enabled then the status bar will also contain a blue link that says "**Audit Trail**". This will allow you to see any changes made to this particular record.

Application Menu and Quick Access Toolbar

Each editor also has its own Quick Access Toolbar located towards the top left. This works in the same way as the main

ClinicOffice Quick Access Toolbar. You can add a new button by simply right-clicking on an icon within the ribbon bar of the editor and choose to **Add to Quick Access Toolbar**. This allows for quick access to some of your main buttons. It is particularly handy when you compress the main ribbon bar.

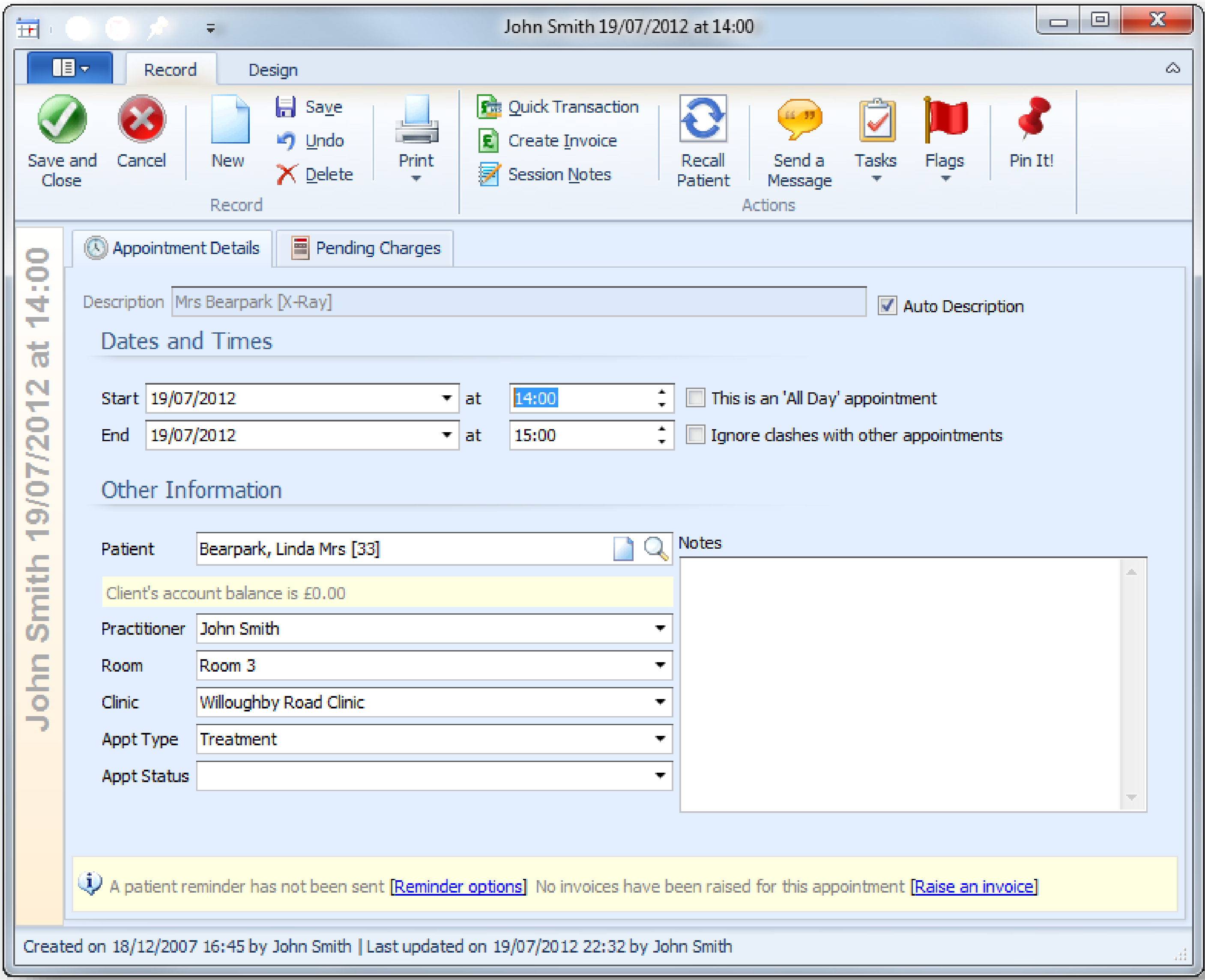


You also have the **APPLICATION MENU** button (example shown to the right) which is to the left of the Quick Access Toolbar. By clicking on this, two columns are displayed. The left-hand column gives you several different functions such as saving and closing, but also to send messages and create tasks. These will vary depending on what editor you are looking at and you will have additional options for some editors. The right-hand column will display all recently viewed records that are of a similar nature (i.e. Patient Editor Application Menu will only display other recently viewed patients records).

The Appointment Editor

The Appointment Editor allows you to create new appointments and edit existing ones. By double-clicking on an appointment in the diary the program will show you the Appointment Editor.

The Appointment Editor



Appointment Editor Fields

These are the fields featured in the appointment editor:-

Description	If the **Auto Description** box is ticked then ClinicOffice will automatically generate a description for this appointment, otherwise you can enter a brief description.
Start Date & Time, Finish Date & Time	This shows the date, start time and finish time of an appointment. If the appointment is an **All Day** appointment then the times will be disabled.
This is an 'All Day' appointment	Tick this box if the appointment does not occur at a specific time. All day appointments appear at the top of the diary directly under the day header.
Ignore Clashes with other appointments	If ticked this will ignore all clashes that may occur with other appointments.
Patient	The patient who is involved with this appointment.
Clients Balance	This is a useful feature as it will display the patient's balance. If they are in debt it will appear in red and if they are in credit it will appear in green. If they are in red you can use this to remind a patient at the point of booking that they owe money for the previous times they have visited.

Practitioner	The Staff Member who will handle this appointment. At the bottom of this pull down menu are two options, **All Clinics** and **Show Deleted.** If you tick the **All Clinics** this will display staff members who do not normally work at the selected clinic. If you tick the **Show Deleted** this will show all previous staff members that have been removed.
Room	The room the appointment is in.
Clinic	The Clinic the appointment is attached to.
Appointment Type	The "type" of appointment (see "The Appointment Type Editor" for more information).
Appointment Status	The status of this appointment.
Reminder Sent	Time and Date of the reminder sent to the patient for this appointment and the type of reminder.
Invoice Status	Displays invoice(s) that have been raised for this appointment. A right-click on this reveals further details.

Appointment Editor - Finances

By clicking the **Quick Transaction** button this will present you with the Quick Transaction screen, allowing you to create an invoice and payment at the same time. If you have a default charge for this type of appointment then ClinicOffice will automatically insert this into the screen.

You can also raise a separate invoice by clicking the **Create Invoice** button. Again ClinicOffice will offer to assign the default charge if one exists for it. For more information on finances and raising invoice please see the main "Finances" section within this user guide.

Appointment Editor - Recalls

From this window you can also create a recall for the patient by clicking the **Recall Patient** button. This will immediately bring up the Patient Recall Editor screen and will fill in details such as clinic, patient; practitioner, appointment type and duration. You can then specify the Recall Date and fill in any needed notes.

The Patient Recall auto-fills its information based on the appointment you are creating it from. What this means is if for example the original appointment had no appointment type then the recall appointment will not have any information automatically filled in for the appointment type. You can of course edit any of the auto-filled in values.

Once the recall is saved it will appear within the Recalls panel and you can setup an automated rule via the Patient Contact Centre so that a recall message is automatically sent out once the recall date is due. For more information on this please see the "Patient Recall" section.

Appointment Editor - Messages

You can send an internal message via an appointment. When you click the **Send Message** button it will automatically link the patient of the appointment to the message. This is handy if you need to send a message to another staff member pertaining to the patient.

Appointment Editor - Tasks

The same thing happens when you create a task via an appointment; the patient is automatically allocated to that task. With a task you can then assign it to yourself, everyone or specific people. You can also specify the reminder and due dates for the task.

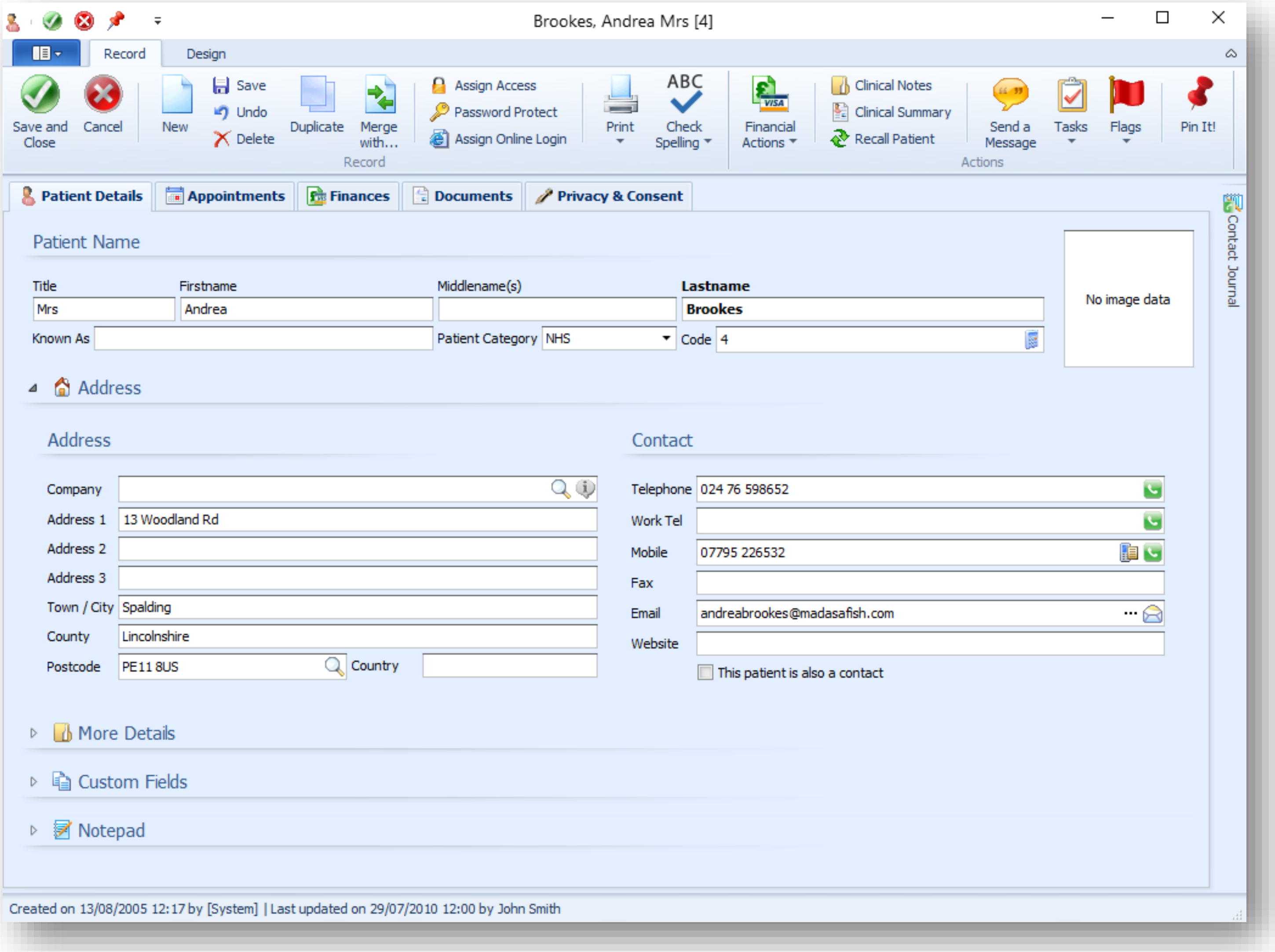
Appointment Editor - Flags

When you click on the **Flags** button to create a new flag you are given three options: "Flag this Appointment Record", "Flag the Associated Patient" or "Flag BOTH this Appointment and the Associated Record". If you select the first option then the flag will only appear when the appointment is opened. If you select to flag the associated patient then the flag will be linked with only the patient and thus will only appear when you open that patient record. If you select to flag both the appointment and patient then the flag will appear when you either open the patient's record or the appointment record.

The Patient Editor

The Patient Editor will allow you to enter, edit or view all the information about a patient. You can access the Patient Editor in various ways. You can double-click on the Patients name, in the patient's grid. You can right-click on an appointment and select **View Patient Record**. You can even open their record from a name

The Patient Editor



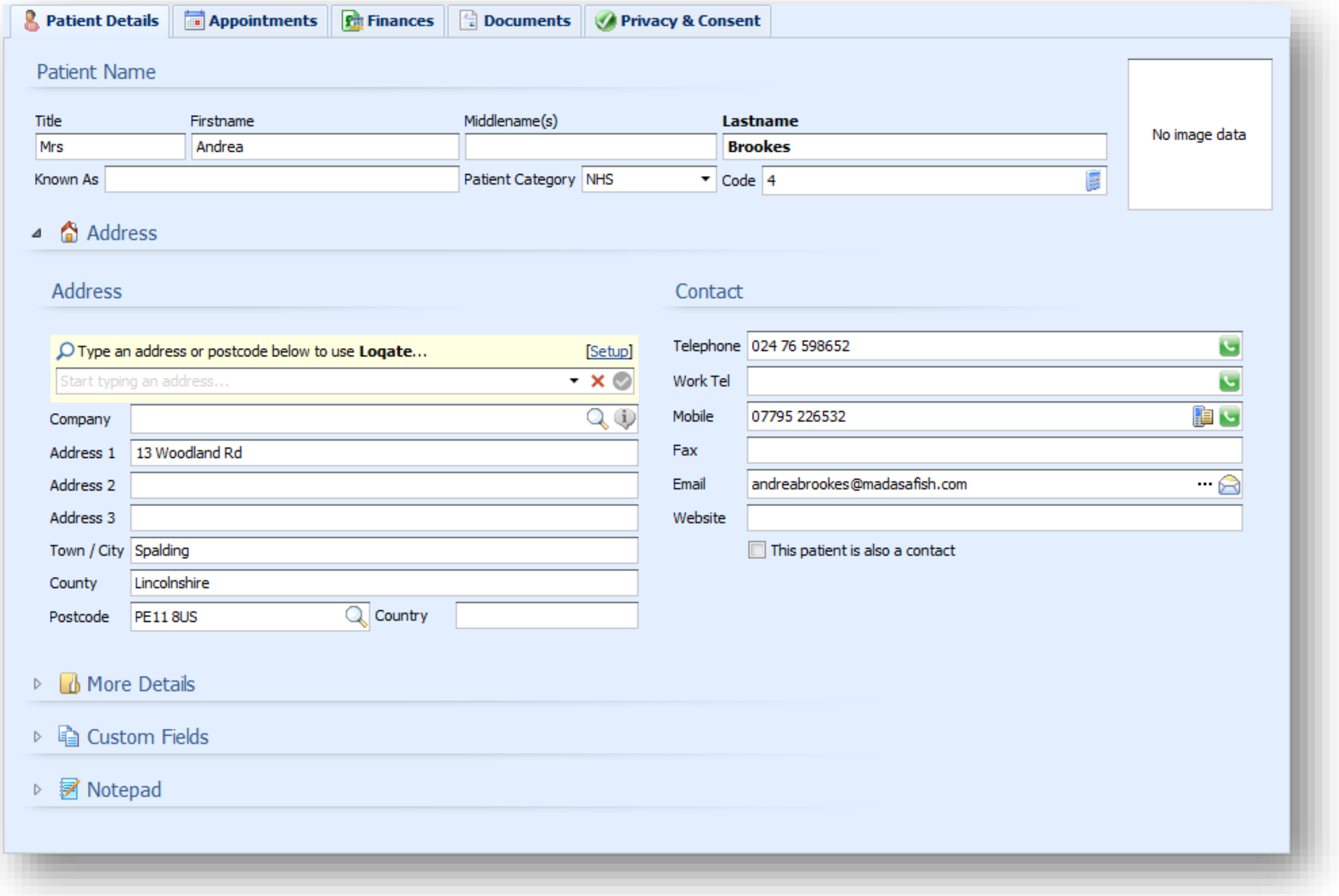
The Patient Editor has the following pages:-

Patient Details	Important information Name etc.
Address	Full address you can use the Loqate service to automatically fill out the address!
More Details	Contains detailed patient information
Custom Fields	Customisable Fields
Notepad	To enter notes about a patient
Appointments	A list of the patients past and future appointments
Finances	The financial standing of the patients account
Documents	The document archive for this patient
Privacy & Consent	Allows consent types to be recorded and for new consent types to be added

For more information on working with Editors please see the "Working with Editors" topic.

Patient Editor – Patient Details

Patient Editor - Patient Record



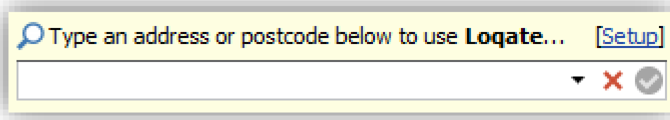
This page contains the patients name, address, telephone numbers etc. There is also a notes field for you to attach any extra notes about the patient. It is very self-explanatory; you just input the required information. The email and webpage will show up underlined and in blue, as these are direct links. If you would like to include a photo of the patient, then double-click on the portrait box. This will then open a window search box for you to locate the folder that you have saved the Photo in.

Automatic Postcode Lookup

There is also the ability of just typing in a patient post code and our Loqate lookup facility will find the address for you (subject to charges from Loqate).

To use the Loqate service you will need to create an account with them. You can do this by going to the **View** menu -> **Program Settings** -> **Global Settings** and click the **Setup Loqate Account**. From here click on the **Step-by-step Guide** blue link and follow the instructions provided there.

Once you have your account information, you can go back into the Loqate Account Setup screen, enter your **Account Code** and **Loqate API Key** and click the **Test Loqate Setup** button. This will test that your account details are setup correctly. If the message comes back positive, click **OK** and you are now ready to use the postcode lookup facility.



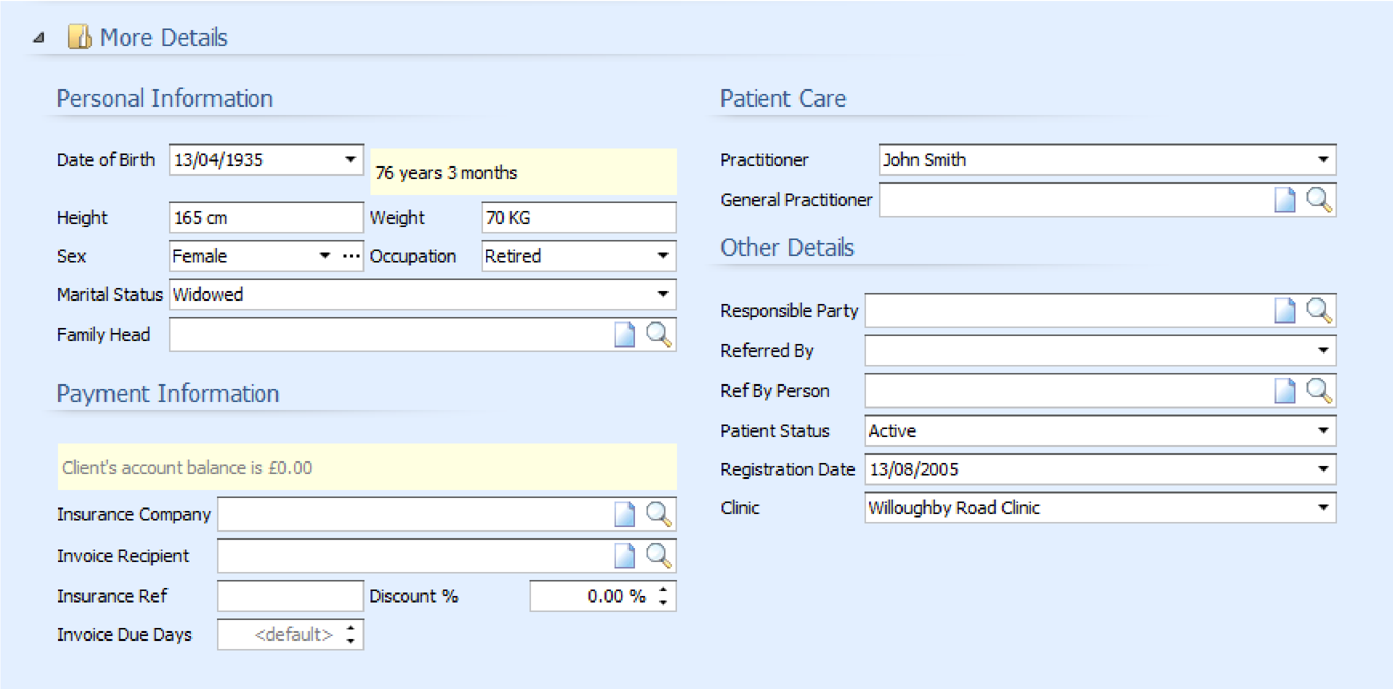
Now imagine if a call has come through and a new patient would like to register. The only information we need to take for the address is the house number and postcode of the new patient. Enter the postcode into the yellow postcode lookup field and click on the address line that appears below. You will now see all the house addresses available for that postcode. You can select the house number or name for the patient's address and click the **Accept** ( ) button once done. The relevant address fields below will now be filled in. You can also do a reverse search, where you would type in the street name, town and perform a search by that means.

Q. Does Loqate work for addresses outside of the UK?
A. Yes, Loqate covers 245 countries and territories worldwide, but the cover will vary from country to country. Please see Loqate's [Address Verification](#) page for more information.

Q. When searching in the postcode lookup field it says "An error occurred" in red text, why is this happening?
A. The main cause for this is either your account code or API key is wrong, in which case you will need to rectify this by clicking the Setup link on the field. your paid subscription has ended with Loqate.

Patient Editor – More Details

Patient Editor - Patient Information Tab



This is the page that stores the more in-depth information about each patient and it is broken down into four sections which are explained further below.

Personal Information

This area stores the patient's date of birth and once entered their age is displayed next to the D.O.B. field. You can store information such as height, weight, occupation and marital status. You will note for the "Sex" field there are three dots just right of the drop-down menu. When you click on these three dots it will allow you to enter in additional gender types or edit existing ones. You can also store other record other information such as the patient's height, weight, occupation and their marital status.

Payment Information

Under this section, you will see the patient's current account balance. If the patient has an insurance company, you can enter it into this area. By doing so, the next time an invoice is raised for them, ClinicOffice will offer to allocate the invoice against that insurance company. Sometimes a patient might have an additional invoice recipient that is not an insurance company, so you could use the **Invoice Recipient** field instead. This will also offer to allocate the invoice against the linked recipient. The patient's insurance reference can be entered under this section as well.

Should the patient have any discount you can specify this under the **Discount %** field. This is the percentage discount for your goods and services that you offer to this patient.

By default, the patient's invoice due date will be the same date the invoice was created on. If the patient by default is permitted to pay later, i.e. 30 days later, you can alter how many days to delay the due via the **Invoice Due Days** field.

Patient Care

Under this section, you can tell the system who the patient's default practitioner is within the clinic. This is only applicable if the patient is treated by mainly a single practitioner. The **General Practitioner** field is the patient's GP.

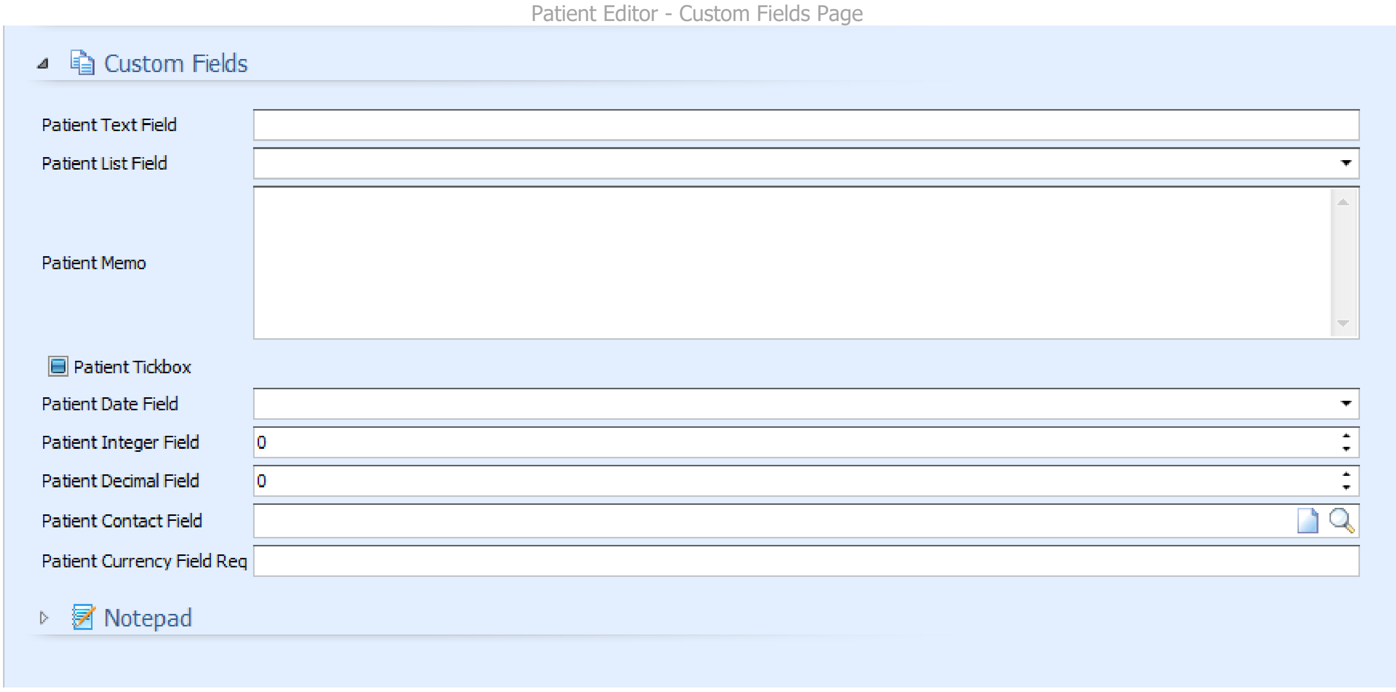
Other Details

The Other Details section will allow you to record the responsible party which can be used for linking parents with their child's record. You can also record how the patient was referred to you (i.e. word of mouth or Google search) and if they were referenced by a person link that person to the record. You can also set the patient status from here. The registration date will default to the date when the patient record is created, but you can manually edit this. The clinic field will default to whatever clinic you have created the record under, but again you can alter this if you have more than one clinic.

Patient Editor – Custom Fields

You can include an extensive list of custom fields; all of these help you to include as much information about your patient as possible.

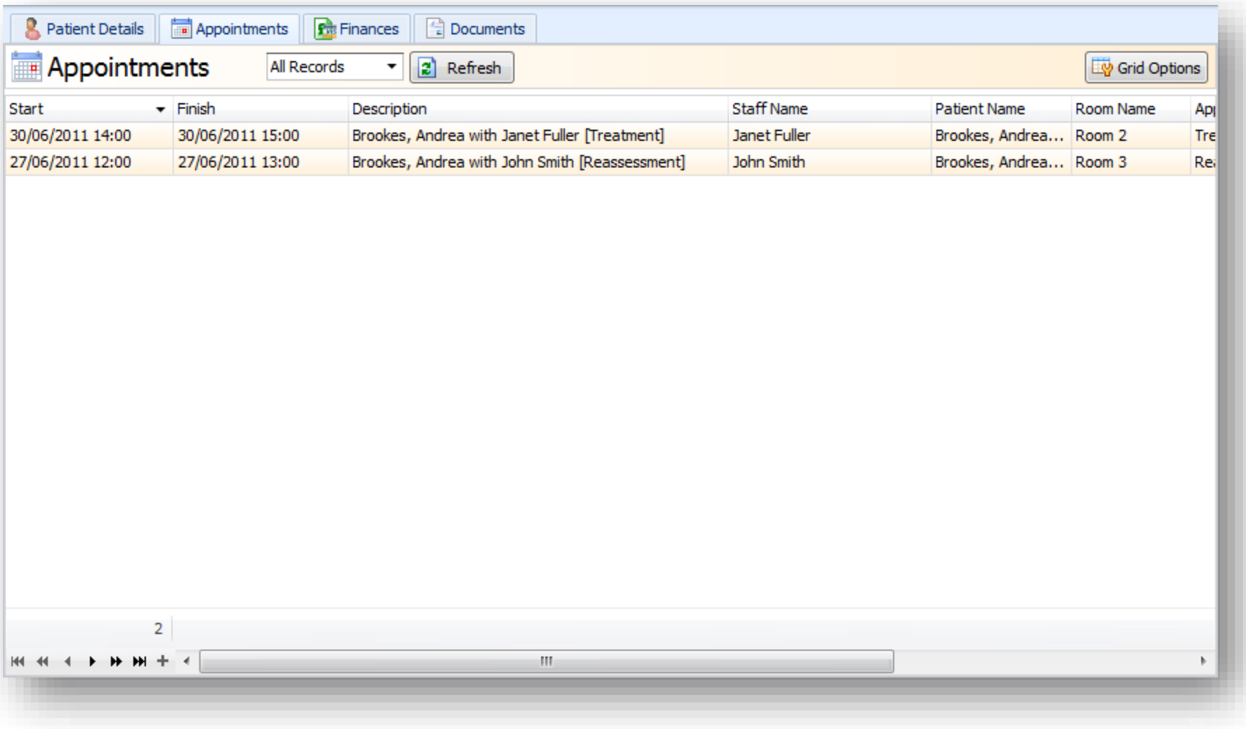
Patient Editor - Custom Fields Page



Here we have a sample custom field page, which shows that the user has included additional information that they would like, which isn't already in either the patient record or the patient information. You can create fields of all types here. These include text, number, calendar, as well as check box fields.

Patient Editor – Appointments

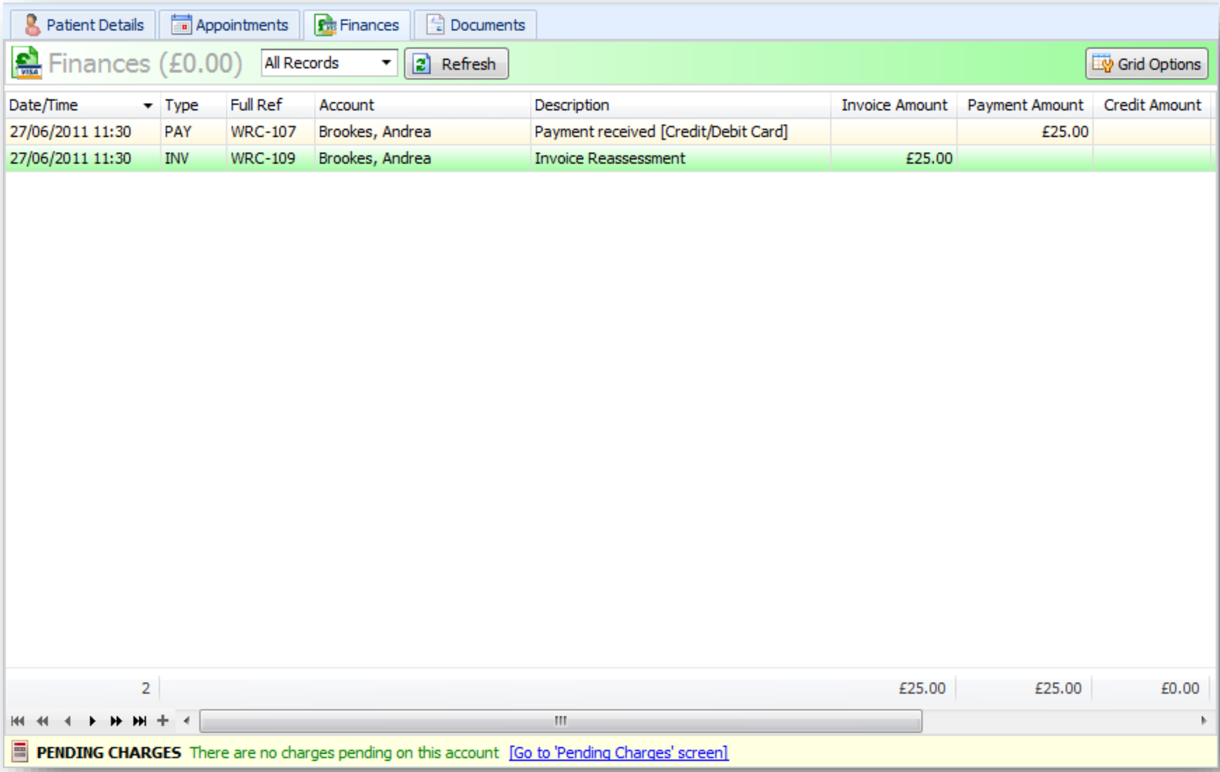
Appointments History Page



Here we have a complete record of all Appointments that a patient has had or is going to have along with the start and end times, the staff member whom the appointment was with and the type of appointment it was. If you double-click on an appointment it will open it up inside the appointment editor. You can also view an appointment in the diary by right clicking on one and selecting **Locate in Diary**. Also, from this right click menu you have the option to "**Delete**" the appointment.

Patient Editor – Finances

Account Balance Page



From here we can see the balance of the patient's account and details of all previous transactions. If a patient queries how much they owe you, a quick look at this screen will tell you all you need to know. At the top of this screen we can see the account balance. Each line is colour coded to indicate whether it is an invoice, payment, or refund. Double-clicking on any line will open the appropriate editor to allow you to view and/or edit the details of the financial transaction.

From the Patient Editor you can also process new financial transactions by clicking on the **Financial Actions** button. This can be accessed from any part of the patient editor. The following options will be available to you.

Quick Transaction	This creates a Quick Invoice and Payment for this patient. For more information please see the section "Quick Transaction".
Create Invoice	This allows you to create an invoice for the patient. Please note that this will not be linked to an appointment and therefore should only really be used for invoices that are not specific to an appointment.
Enter Payment	This will allow you to mark a payment against the account and allocate it against any outstanding invoices. You can also process a physical payment from this screen.
Raise Credit Note	This will enable you to correct any charges made by an invoice or it will enable you to give a refund.
Process Payment	Allows you to process a physical card transaction without creating a payment record within the finances grid.

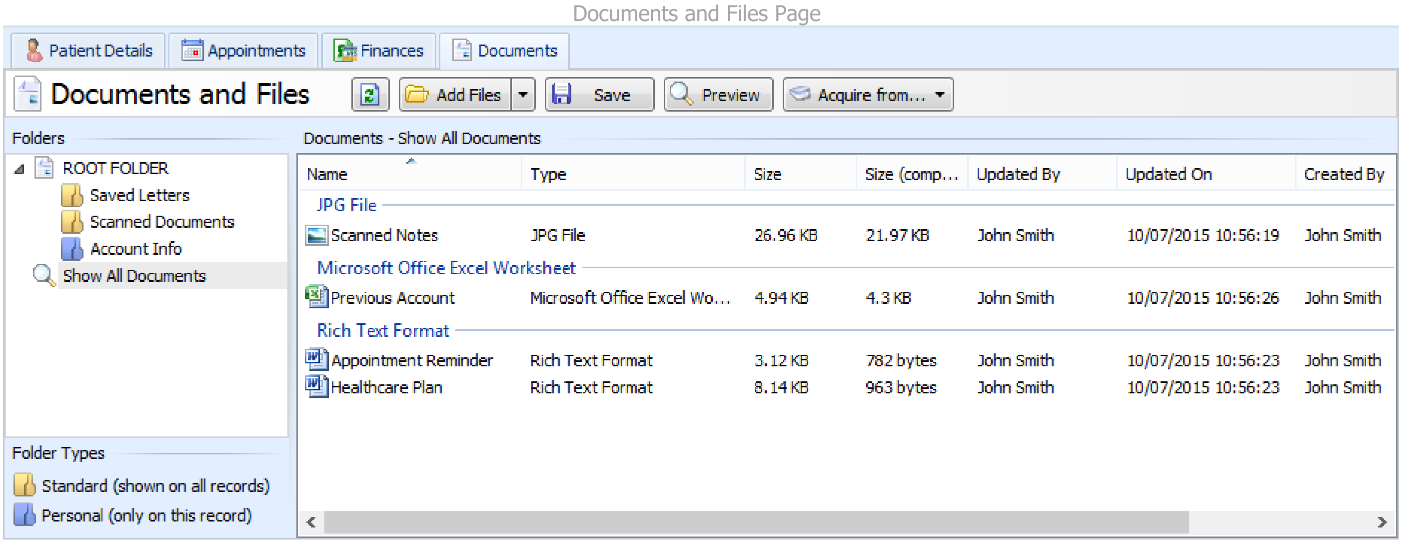
The table below is displaying the options available when you right-click on the Patient Finance grid.

Open Record	This will open the highlighted record.
Delete Record	This will delete the highlighted record.
Print Preview	Print Preview the current Patient Finance grid.
Export Grid	Export the current Patient Finance grid to one of these formats: CSV, Excel, HTML, MHT, RTF, PDF and Text.

Patient Editor – Documents

The document page allows you to store any files relevant to the current patient for easy access. These files are compressed and archived in the current database. Alternatively, you could store a shortcut to the file.

Documents and Files Page



Document Folders

By default, documents and files will be stored in the Root Folder, however, you can create folders to help you organise these. There are two different types of folders: Standard folders and Personal folders. A Standard folder acts as a universal folder, which means that the same folder will be visible across all patients. What it does **not** mean is that a file you save to the folder will be accessible on every patient record; that file will still only be visible for that patient. A Personal folder is a folder that will only be visible on the patient record that you create it on.

Like with any other folder system, you can drag and drop files or documents into any of the folders. This works whether you are dragging a file from the Root Folder or a file from another folder. You can also view all patient files and documents at once, no matter which folder they are in, by selecting the "**Show All Documents**".

Adding Document and Files

To add a file to the patient's Documents and Files, simply drag and drop the desired file from the windows explorer into the document area (as shown in the previous screenshot).

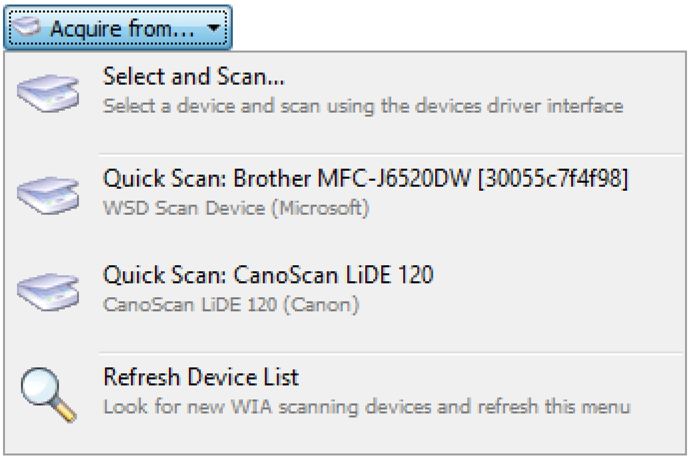
When you drop the file, you are presented with a message that gives you two options, which is to copy the file to the database or to make a shortcut to that file. If you choose to **COPY**, ClinicOffice will compress the file (to save disk space) and save it to your database. The advantage of this is that you can access the file no matter which computer you are on. The downside is that it may increase the database size considerably. If you choose to create a **SHORTCUT**, then a shortcut will be created which points to the original file on your hard drive. The advantage of this is that it will keep your database a smaller size. The downside is that the shortcut is only relevant to the computer it has been created at. This means you would not be able to access that file over the network, unless it is located on a common shared directory.

Another way to add a new document is to click on the Add Files button.

Clicking on **Add Files** will open a window, which allows you to select the desired file. Alternatively, by clicking on the downwards arrow you can choose to merge the record with a letter and save it to the Patient's Document area.

> ***NOTE:*** *If you do not have the Documents module then you will only be able to add up to three documents per patient and contact. Purchasing the module will remove this restriction.*

Acquire from Menu in the Patient's Document Area

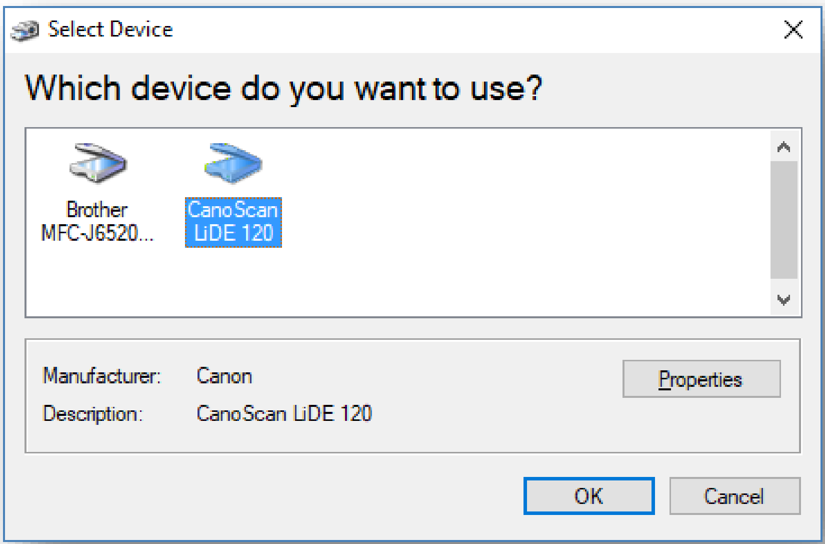


Scanning Directly into the Documents Area

You may also click the **Acquire From** button to scan a document from a scanner or digital camera. This feature will pick-up on any WIA 2.0 (Windows Image Acquisition) compatible devices. When you click the **Acquire From** button a menu will appear (see image to the right).

To perform a quick scan, simply select the device you wish to use. This will import images from that device and you will have the option to compress the image size (this is recommended).

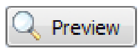
If you have more than one compatible device attached then you will also see the additional option, "**Select and Scan...**" When you click on this, a window will appear like the one below.



From here you can then double-click on the scanner you wish to use. The difference between this and selecting one of the scanners directly from the **Acquire From...** button's drop-down menu is that you will be given the scanner's options window. When this appears, you can select if you want the image scanned in colour, grayscale or black and white. You can also change the source of the scanner if it has more than one source.

> ***NOTE:*** *The **Acquire From** feature is not available on the Hosted edition because WIA 2.0 drivers do not work by default over a Remote Desktop connection.*

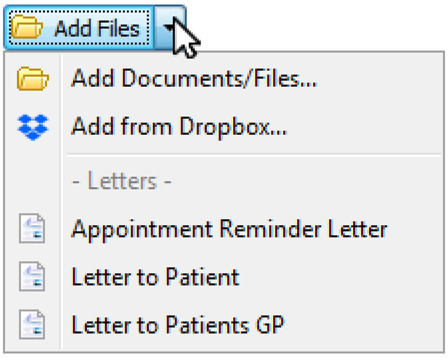
Previewing Images and PDF Documents

You may preview images and PDF documents stored in the patient's document section by clicking the 

button. The preview window can be altered in size so that the image is displayed correctly. To do this, bring your mouse cursor to the edge of the window and simply drag the side across. The image will continue to expand until it has reached its actual size. You can zoom in by left-clicking on the image and to zoom out click the middle mouse button. Also if you right-click on the image, a menu appears with several options (For more information see the section "[Viewing Scanned/Imported Images](#)").

Add Files Menu

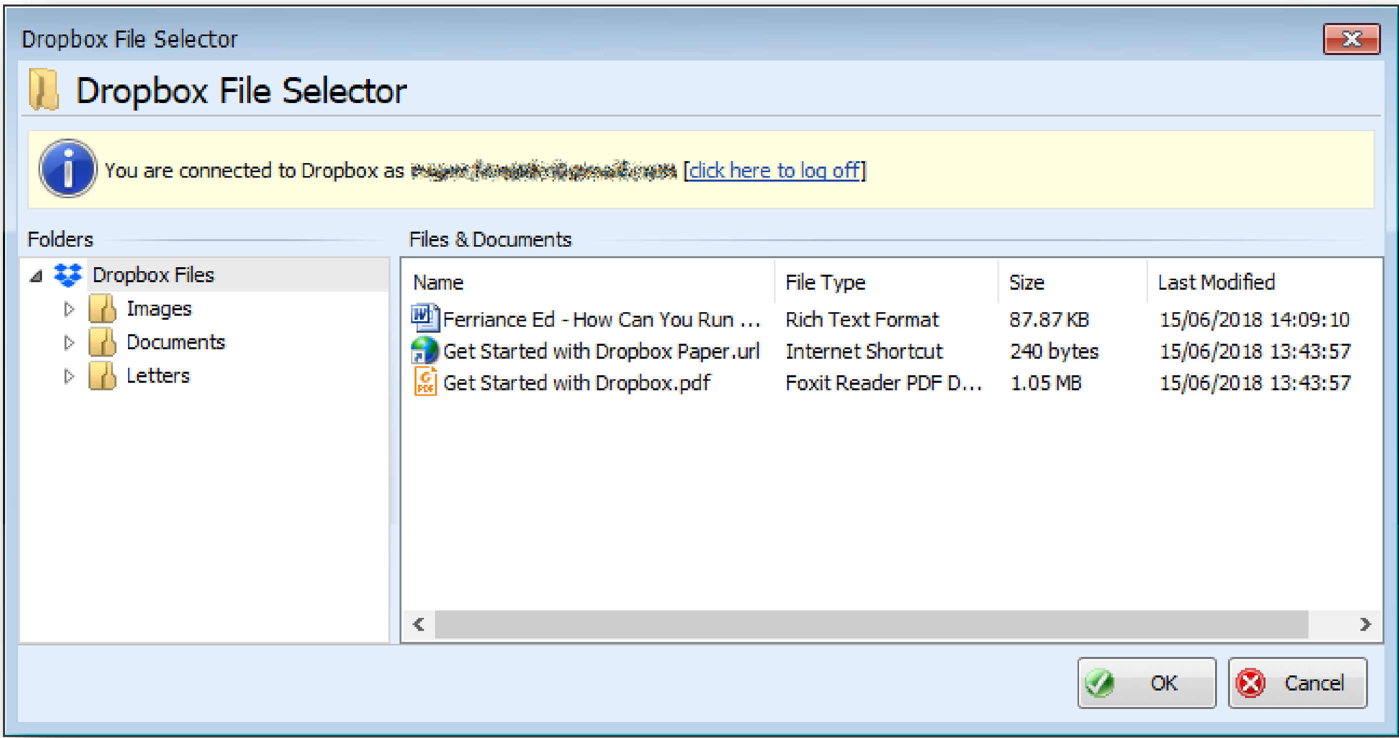
Adding Files from Dropbox



You can import documents from Dropbox. The steps below will demonstrate how to do this.

1) Click on the arrow symbol on the right of the **Add Files** button
2) Click the **Add from Dropbox...**
3) On the next window you will be asked to login to your Dropbox account, enter in your details and click **Sign In**
4) You will need to verify that you are not a machine by selecting the relevant images and clicking **Verify**

The Dropbox File Selector window will now appear.



5) From here you can navigate through your Dropbox files and locate the file you wish to attach. Select your file and click **OK**.

The document will now be attached to the patient's documents.

Uploading Files to Dropbox

You can also upload files directly to Dropbox by right-clicking on a file within the Documents area and select "**Upload to Dropbox**". If you are already signed in, select the folder you wish to save the file to and click **OK**. The upload will commence and once finished it will confirm that the upload is complete. You can also do the same for multiple files by selecting several of them and performing the same actions.

Editing Documents and Letters

You can edit documents within the Patient's Documents by right-clicking on them and selecting **Open for Editing**; this will open the file into its default program (i.e. a letter would be opened with the default word processor such as Microsoft Word). To save the changes made, you need to save the edited document first inside the default program. This saves the changes and replaces the existing document in ClinicOffice. If you are storing documents on your local hard drive instead of within ClinicOffice, then you can also double-click on the document to open it for editing.

We recommend using the Documents area of ClinicOffice for storing correspondence letters and other administrative documents. Clinical documents (e.g. X-Ray images or postural photographs) are best stored as attachments in the patient's clinical tree. It is also advisable to **Copy** the files to the database rather than creating them as a shortcut.

Q. I am trying to edit a letter I saved to the Documents area but ClinicOffice is asking me to save it as a new document rather than saving it to the current document?

A. This happens when you double-click on a letter and start to edit the document. By default, a reminder message will appear to say that you are editing a “copy” of the selected document. If this message has not appeared it means the option “Don’t show me this message again” would have been ticked in the past. So, double-clicking is merely opening a copy of the document. If you wish to edit the document and for the changes to be saved to the same document, then you will need to right-click on the letter and select **Open for Editing**. Now when you go to save the letter it will overwrite the same document.

Emailing Documents

If you need to email any documents or files, then all you need to do is select them from the document screen, right click and select **Send via Email**. This will open a new email via your default email program and attach the document(s) to the email. If you have the Email Manager Module setup in ClinicOffice and it is your default email application, then ClinicOffice will open the new email screen; again, the document(s) will be attached. If you have Hosted edition of ClinicOffice then you will require the Email Manager module for this to work. If you do not have the module then you can always save it to your local hard drive by right-clicking on the file or document and selecting **Export To**. From there you can then select to save it to somewhere on your local C drive for example and then attach it to your email program of preference.

Patient Editor – Duplicate Records

There may be times when you wish to copy a patient’s details and put them into a new record. This may happen when you have more than one family member living at the same address but you wish to create separate records for each of them. To make a copy of the patient record, press the Duplicate button. You will note that your previous record will be saved, and the newly duplicated record will open straight away. All information stored in the *Patient Details* will be copied over. The only difference that you will note is that in front of the last name are the words “Copy of”.

Patient Editor – Merging Records

You may have more than one record for the same patient. This can cause confusion when creating a new appointment, invoice or payment and when searching through the Clinical reports.

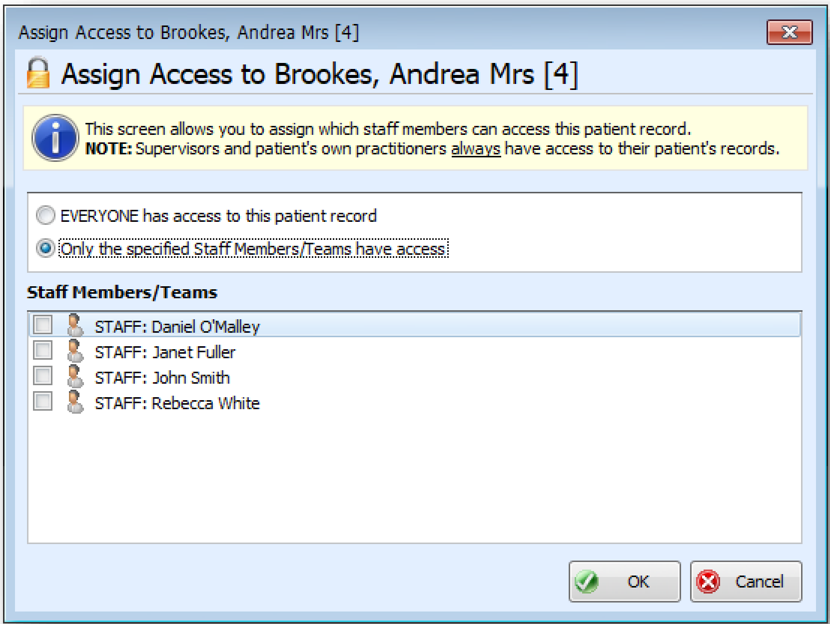
By pressing the Merge with... button you will be able to search for this matching record and then choose to merge with it. You can then select which record you wish to keep. The record that you decide to keep will retain their details and medical information. All clinical notes, documents and finances will be transferred across from the other record.

See the section “Merging Records” for more information.

Patient Editor – Assign Access

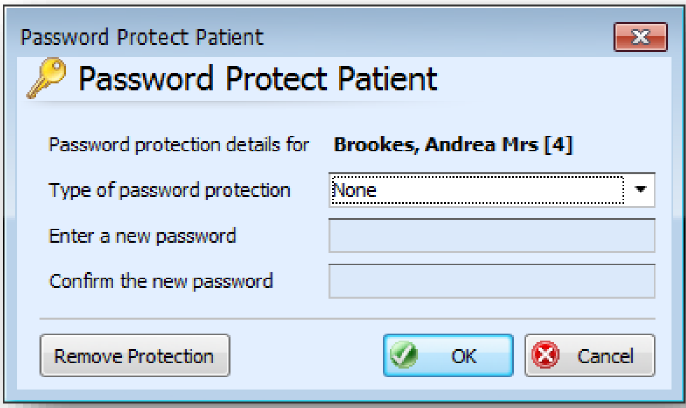
You may have a patient whose details are highly confidential, and you wish to deny others from being able to access them. This setting is not to be confused with the Staff Member’s access rights but instead is an additional layer of access on top of the main access rights. This setting only applies to accessing the current patient you would be looking at and to the patient’s clinical notes.

To assign this individual access right, click the Assign Access button. The window to the right will appear. You can specify who can access this patient record by selecting the option “Only the specified Staff Members/Teams have access” and then ticking either the individual staff or teams. Anyone who is not ticked will not have access to this patient’s record or their clinical notes.



NOTE: *Anyone with administrator access rights will still be able to access the patient's record and clinical notes regardless of this setting.*

Patient Editor – Password Protect



Like the Assign Access option, the Password Protect is another way of denying others from accessing the patient's record. This option is suitable for a single staff member for a single patient but is not suitable for a group of staff, although it can be used for this purpose.

To set a password click the Password Protect button (located on the ribbon bar of the patient editor). The following window will now appear:

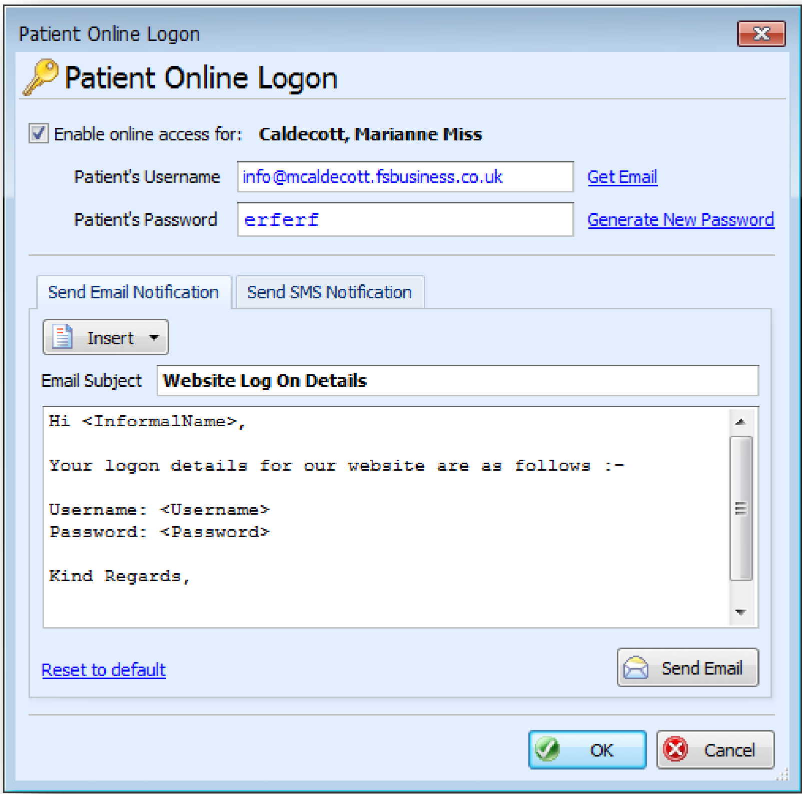
When selecting the **Type of password protection**, you will have the two following options:

Protect Clinical Notes	This will place a password on the clinical notes only. This will mean that you can still access the patient's record without needing to enter a password.
Patient Record & Clinical Notes	This will place a password on both the patient's record and their clinical notes. So, when trying to access either of these, you will have to enter a password first.

Once you have selected the type of password protection you can then enter your password and then click **OK** to confirm this. The password will now be implemented.

Patient Editor – Assign Online Login

Patient Online Logon



This feature is only applicable if you have the Online Diary module. Using this you can manually assign a patient with their Username and Password for the online diary.

To do this click the Assign Online Login button and the Patient Online Logon screen will appear. When you tick the "**Enable online access**" checkbox, this will allow you to generate the patient's username and password by clicking the "**Get Email**" or "**Generate New Password**" blue links.

In the lower half of the window there are two tabs: Send Email Notification and Send SMS Notification. As the titles imply you can send your patient their username and password from the respective section. A default template is present for both, along with the correct merge fields. You can however edit and customise either one of these messages; this includes adding additional merge fields via the insert button. Once you are happy with the template(s) click the relevant **Send** button.

Patient Editor – Send a Message

You can send internal messages through ClinicOffice. When you click the **Send a Message** button from the patient record there is a link attached to the message that leads back to the patient you are looking at. This can be used when you wish to inform a staff member about a patient. For more information on messaging within the program please see the section "ClinicOffice Messaging".

Patient Editor – Tasks

You can assign tasks to staff members so that they know if they have any additional duties to carry out. If you create a task via the patient record, this patient will be attached to the task. This means that the staff member (that the task has been sent to) can open the patients record via this link.

Patient Editor – Flags

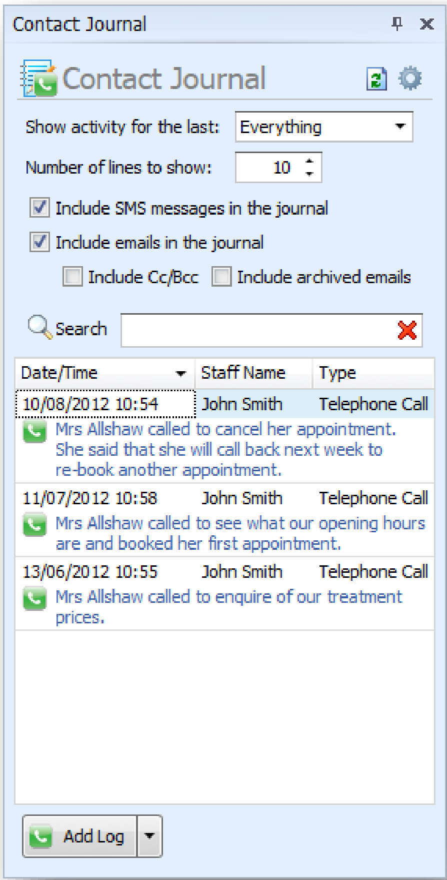
Flags are very useful. Basically, they allow you to tag a patient's record with a piece of information. Later on, you can then search for patients who have specific flags. Flags can also be linked to an appointment status change, i.e. when an appointment status changes to "patient DNA (did not arrive)" then a DNA flag can be tagged to the patient's record. Please see the topic "Flagging" for more information on the use of flags. Any flag that is attached to a patient's record will be displayed in this part of the Patient Editor. From this screen you can also add, delete and edit the flags for this patient.

Patient Editor – Contact Journal

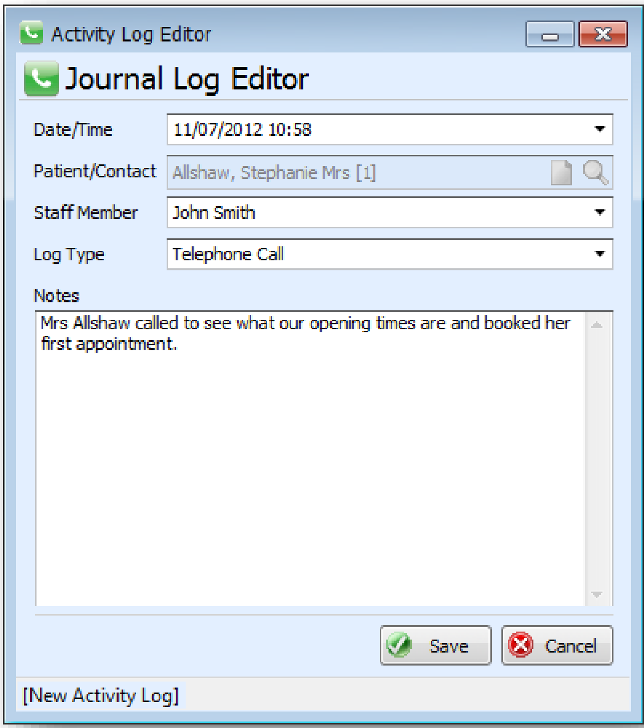
The contact journal is designed so that you can store notes on any communication that you have had with the patient. So, for example you could create a new log entry for a telephone conversation you have had with a patient or information pertaining to an email.

The Contact Journal tab is located to the right side of the patient editor. The journal is composed of the following:

Show activity for the last	This will allow you to select the date range of logs that you wish to preview on the journal.
Number of lines to show	This will allow you to select the numbers of note lines you wish to see in the preview panel for each log entry.
Include SMS messages in the journal	Will show SMS messages that have been sent from ClinicOffice to the patient and if enabled any messages received. If you do not have the access rights to see SMS messages, then even with this option ticked you will be unable to view SMS messages for this patient.
Include emails in the journal	If you have the Email Manager module and have this option ticked, then any emails related to the patient will appear here. This will only show emails from email folders that a user has access to. So what one member of staff can see might be different to what their colleague can see.
Include Cc/Bcc	When ticked this will display any emails where it contains the patient's email addresses within either the Cc or Bcc field.
Include archived emails	Shows any emails that have been archived. Archived emails are only applicable to POP based email accounts.
Search	You can search for specific words/phrases so that you can locate a specific log(s) entry quicker.
Preview Grid	This is where you will see the preview of your log entries.



Adding a New Journal Log Entry



To add a new log entry, you can click the **Add Log** button. This will open the Activity Log Editor (as shown to the right). Once the Activity Log Editor is open you can then assign what type of log the record is, i.e. 'Telephone Call' and then enter your notes into the notes field.

Alternatively, if you click on the arrow symbol adjoining the Add Log button, you can then select the Log Type from the drop-down menu. The Activity Log Editor will then open and the Log Type field will already be filled in.

You can add/change the log types via the View menu in ClinicOffice -> Types and Categories -> Journal Log Entry. From this location you can also change the colour of the log entries.

When in the Activity Log Editor, if you right click on the Notes field you are presented with the following options: Undo, Cut; Copy, Paste; Select All, Quick Text; Stamp Notes [Top], Stamp Notes [Bottom] and Check Spelling.

From this list of options, the Quick Text is very helpful if you have certain phrases or passages of text you use often. The reason is that the Quick Text feature allows you to insert pre-recorded text. A shortcut to open the Quick Text is by pressing the Ctrl and Space keys together. For more information as to how the Quick Text feature works and how you can create text templates please see the section "Quick Text Templates – For Clinical Notes and Memo Fields" within this User Guide.

Patient Editor – Privacy & Consent

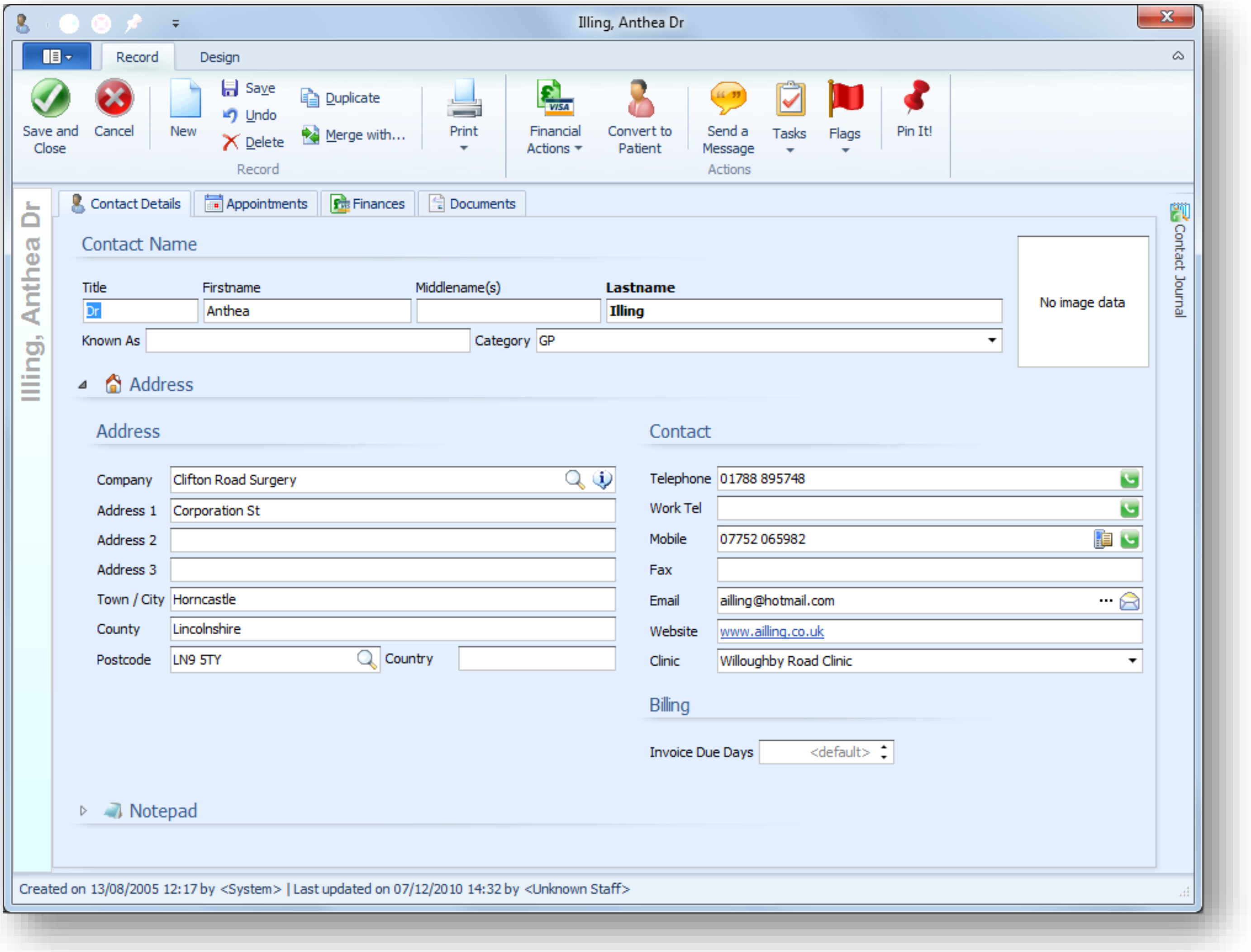
The Privacy and Consent tab will allow for you to update a patient's consents. From this screen you can also view the audit history of past consents given for the patient.

For information on how to use this screen, please see the section "Recording Consents".

The Contact Editor

The Contact Editor lets you create/view/edit all the information about the Contact. You can access the Contact Editor in various ways; probably the most common is to double-click on a contact in the Contacts grid.

Contact Editor – Contact Record



For more general help on using editors in ClinicOffice, please see the topic "Working with Editors" in this manual.

Each contact record has four pages in total:-

• Contact Details	Contact information for the contact and any additional notes
• Appointments	List of their past and future appointments
• Finances	Financial standing of the contact
• Documents	The document archive for this contact

Contact Editor – Contact Details

This tab contains the Contacts name, address, telephone numbers, email address etc. Please note that the email address and the Webpage are blue. This is because they are direct links. Clicking on this will either open your web browser to access the webpage or open your email client program with the email address inserted.

The "Clinic" option allows you to either associate this contact to a clinic or to all clinics held within this database. The "contact category" allows you to label the contact; for instance, if he was a plumber or electrician, or perhaps more importantly an Insurance company or GP.

Contact Editor – Appointments

As with the Patient Editor, this tab shows you a list of the contact's appointments. It's useful to refer to this screen if a contact queries anything about either their past or future appointments.

This screen is the same as the Patient Editor. Please refer to the section "Patient Editor – Appointments" for more information.

Contact Editor - Finances

From this screen you can track all account transactions. You can create an invoice, receive a payment and even give out refunds.

It also tells you a summary of their account balance. If a contact queries anything about their account, then a quick look at this screen will tell you all you need to know.

This screen is the same as the Patient Editor. Again, please refer the section "Patient Editor – Finances" for more information

Contact Editor – Documents

From here you can access all documents or files that are stored within this contacts record. This screen is the same as the Patient Editor. Please refer to the section "Patient Editor – Documents" for more information.

Contact Editor – Duplicate Records

Like the patients you can duplicate a contact's record. Once the 

button has been clicked the original record is save and then a new copy will open. This will "copy of" in front of it of the last name.

Contact Editor – Merging Records

Like the patients you can have more than one record for the same contact. By pressing the 

button you will be able to search for this matching record and then choose to merge with it. You can then select which record you wish to keep. The record that you decide to keep will retain their details. All documents and finances will be transferred across from the other record.

See the section "Merging Records" for more information.

Contact Editor – Convert to Patient

By pressing the **Convert to Patient** button (located in the Contact Editor's ribbon bar) you can turn your contact into a patient. Both records are the same. They both will share the same finances and documents. So, when one record has been invoiced the other record will display this and when one has paid the other one will have a record of this.

Please note that once a contact has been converted into a patient you cannot reverse this. You can remove a patient from being a contact but not the other way around. The reason is that the patient record contains more information, such as the medical fields; this means that the patient record becomes the master record.

Contact Editor – Send a Message

Works identically to the patient editor's messaging. When you click the **Send a Message** button from the contact record there is a link attached to the message that leads back to the contact you are looking at. This can be used when you wish to inform a staff member about a patient. For more information on ClinicOffice's messages please see the section "ClinicOffice Messaging".

Contact Editor – Tasks

Again, like the patient's editor you can create a task via the contact's record; this contact will be attached to the task. This means that the staff member (that the task has been sent to) can open the contacts record via this link.

Contact Editor – Flags

As with patients, you can flag contacts records. For more information please refer to the section "Flagging".

Contact Editor – Contact Journal

Just like the patient editor you can store any form of communication that you have had with the contact under the contact journal. This information is stored in the form of log entries within the Contact Journal Panel. The contact journal also displays linked emails (requires the Email Manager module) and SMS messages sent and received from that patient. For more information on this, please see the section Patient Editor – Contact Journal.

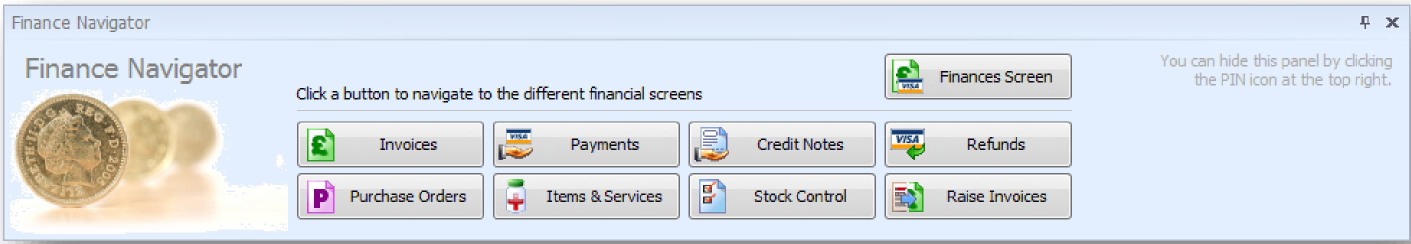
Contact Editor – Privacy & Consent

The Privacy and Consent tab will allow for you to update a contact's consents. From this screen you can also view the audit history of past consents given for the patient. For information on how to use this screen, please see the section "Recording Consents".

Finances

ClinicOffice v5 has a new way of dealing with your finances. We now have a Finance Centre for moving around the finances. You can locate the finance module by clicking the **FINANCES** button on the ribbon bar.

Finance Centre Window



As you can see there are nine sections of the finance module, these are:-

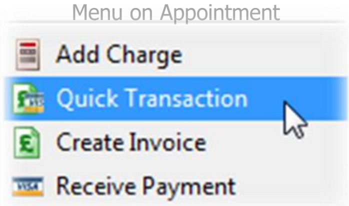
• Finances	The finance grid (displays all invoices, payments, credit notes and refunds)
• Invoices	The invoice grid
• Payments	The payments grid
• Credit Notes	The credit notes grid
• Refunds	The refunds grid
• Purchase Orders	The purchase order grid
• Items & Services	The list of all of your chargeable items
• Stock Control	The central point to monitor stock levels of items
• Raise Invoices	This area allows you to raise an invoice from charges

Notice too that you can dock this panel so that it becomes a tab at the bottom of the screen. This allows more space for your information. To do this simply click on the **PIN** icon; this is located to the top right of the Finance Centre.

Quick Transaction

What if you need to create an invoice and take a payment at the same time? To do this you will use the Quick Transaction. It is much quicker than creating a full invoice and then linking it up with a payment (2 editor windows used). The Quick Transaction instead enables you to create an invoice with a payment and change the appointment status (only available when created with an appointment) just by using a single editor.

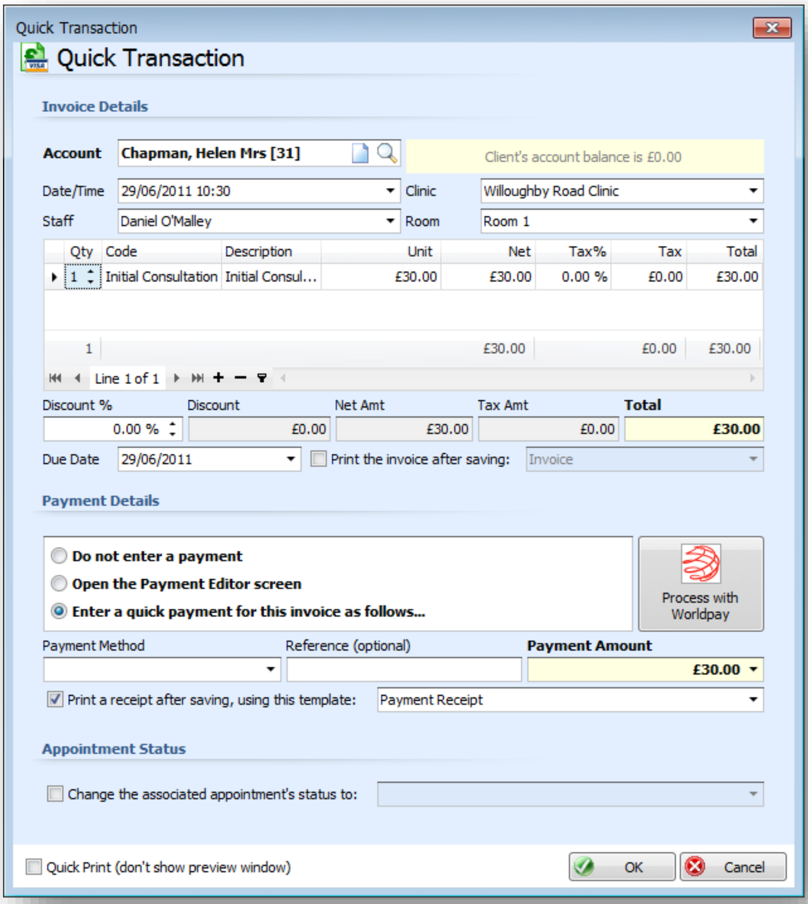
Quick Transaction via Right-Click Menu on Appointment



There are a number of ways to create a quick transaction. The best though is to right-click on an appointment in the Appointment Diary. This is because the invoice and payment will then be tied to that appointment and you will see an invoice icon on that appointment.

When you do this, the Quick Transaction editor will appear and will look similar to the image below:-

Quick Transaction



Different Invoice Recipient

If you create a Quick Transaction for a patient whose invoices are sent to a different recipient, then this message will appear asking if you wish to create the invoice for the alternative recipient or the patient.

Click on the recipient you wish to send the invoice to. The Quick Transaction Editor will then generate the recipient's name in the **Account** field. The same message appears also when you are creating an Invoice for a patient who is not the invoice recipient.

Invoice Details

To create a Quick Transaction, simply complete the details on the form: the patient, the item for which they are being billed, the invoice total.

You will notice that under the Invoice details, ClinicOffice tells you the person's account balance (in the example to the left it is £0.00). If they have a debt on their account then this will be in red and if they are in credit it will be green. You also have the option of printing the invoice after you have saved the invoice and changing the appointment status that it is linked to. If you wish, you can also flag the invoice later to say that it has been printed.

Payment Details

If the recipient is in credit you will be given the option to use the unallocated money against this invoice. This can be done ticking the check box which will mention applying the excess money (option available at the top of the Payment Details).

This option is only visible if there are unallocated funds available for the patient. Otherwise, there are the standard three options for the quick payment:-

[1] Do not enter a payment

Enter no payment. This will then leave the invoice unpaid on their account.

[2] Open the Payment Editor screen.

This will take you to the full payment screen rather than posting a quick payment. This is useful when a patient would like to pay a number of invoices with this payment. You will be able to allocate this money against numerous invoices. Please see the topic "Entering Payments" for more details.

[3] Enter a quick payment for this invoice as follows…

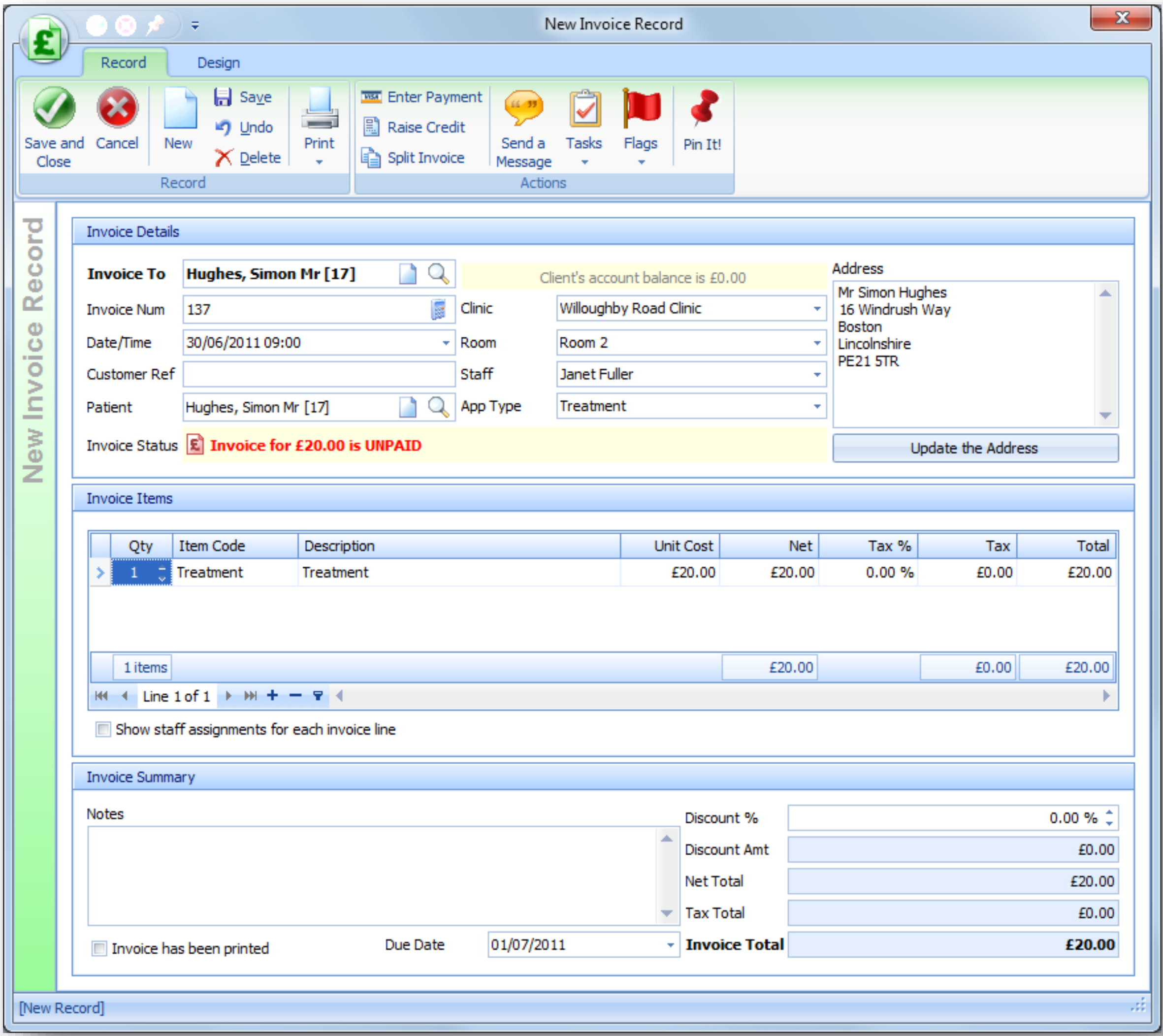
If you are just entering a payment for the quick invoice on this screen you should choose this option. Select the payment method and if they are paying by cheque you might want to put the cheque number in the **Reference (optional)** box. You can also choose if you want to print a receipt for the Quick Transaction.

After you have entered all the details for your quick invoice and/or payment, click the **OK** button to proceed. ClinicOffice will then summarise the Quick Transaction and ask for confirmation. Simply click **YES** to create the invoice and payment.

The Invoice Editor

The Invoice Editor allows you to create/view/edit invoices in ClinicOffice. You can create an invoice in many ways – by right-clicking an appointment in the Diary, or from the ribbon bar in the Patient Editor, or from the invoice grid under Finances.

The Invoice Editor

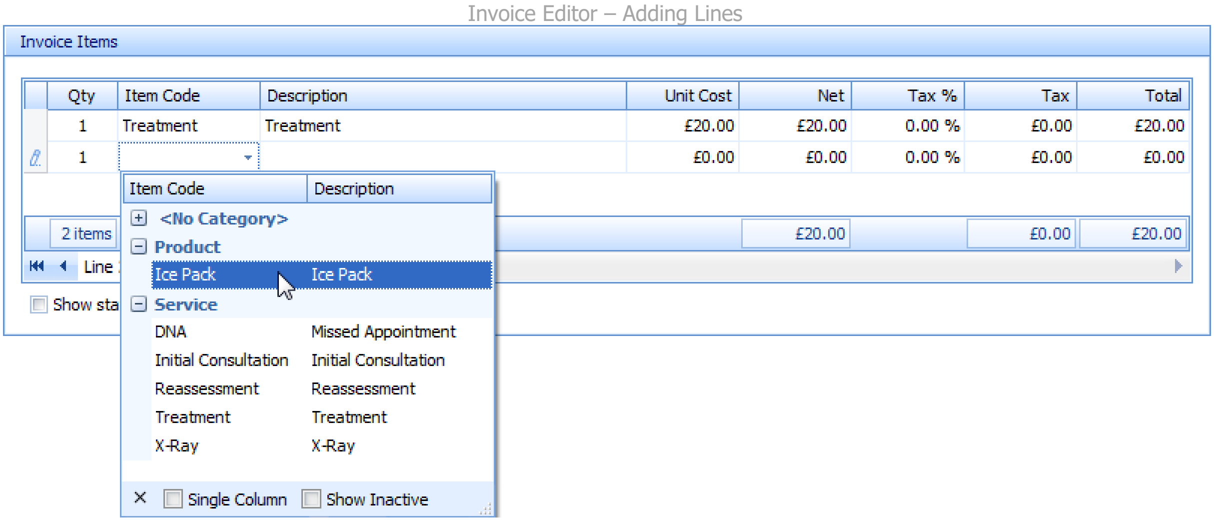


Field Name	Description
Invoice To	Here we select the invoice recipient
Invoice Number	A unique number which identifies this invoice
Date/Time	This is the Date and Time that the invoice was created
Customer Reference	Any reference requested by the recipient, especially useful for insurance companies
Patient	The patient to whom this invoice relates. This may be different from the recipient – for example, the recipient may be an insurance company such as BUPA while the patient is the person who was treated.
Invoice Status	Shows the patient's account balance
Clinic	The clinic from which the invoice is being issued
Room	You can assign a room to an invoice which is useful if you want to track revenue generated by different rooms at your practice
Staff	The staff member to whom this invoice is assigned
Appointment Type	This tells you what type of appointment (if any) the invoice was generated from
Address	This is the address for the recipient of the Credit Note. Clicking the **Update the Address** button will insert the recipient's address.

Adding Lines to an Invoice

Click the **+** Link underneath the Invoice Items list. There will now be an empty line in the invoice for you to fill in. Under the description column you can either select an item from the items database, or type in your own description. The advantage of using your predefined items is that the costs are automatically generated.

Invoice Editor – Adding Lines



It is good to note that ClinicOffice allows you to have complete control over the invoice lines; even if you choose items from your product database you can still override the item descriptions, unit costs and tax percentages. When adding an item you can select to view inactive items. Also if you use a separate item code and description you can select to combine these two on the drop down list by ticking the option **Single Column**. This will thus enable you to search on the description as well as the item code when typing into the drop down field.

There is no limit to the number of lines you can add to an invoice; just keep clicking '**+**'. You can delete an invoice line by selecting it and then clicking '**–**' button.

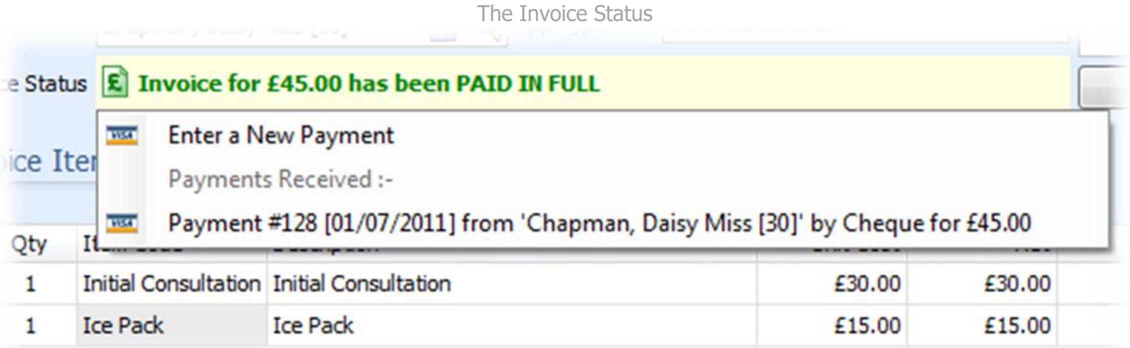
When you have filled in all parts of the invoice and included anything necessary in the **Notes** field, you will see that there is an option to give a **Discount %**. As you click on the up / down arrows to increase or decrease the discount, you will see the **Discount Amount** and the **Invoice Total** change.

Once you are happy with the Invoice you can save it by clicking **Save and Close**.

After saving an invoice, the program will tell you that the invoice has money outstanding on it. If you would like to fill in a payment now click **Yes** and you will be taken to the payment screen.

The Invoice Status

The Invoice Status



The invoice status (under the Patient field) indicates how much (if any) of the invoice is still outstanding. In the above screen, the Invoice Status is **PAID IN FULL**.

When you click on the Patient Status you will see a drop down menu.

The first menu item takes you to the Payment Editor so that you can enter a new payment against this invoice. The other items in the menu show you existing payments that have already been made against this invoice. Clicking on one of these existing payments will open the Payment Editor for the selected payment.

Splitting an Invoice

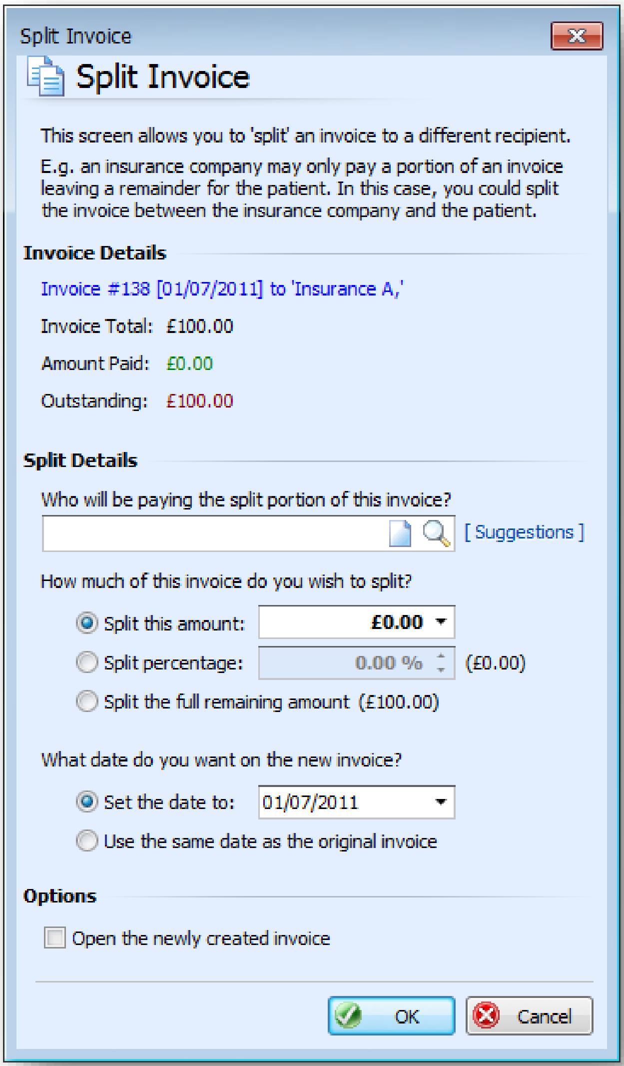
Although ClinicOffice is not an accountancy package its finances are based on a double entry booking system, similar to many accountancy packages. This means that a financial transaction is recorded twice, once in the form of an invoice and once in the form of a payment. The invoice can only have one recipient who will pay it off. In effect this means that when an invoice is raised for a recipient it has to be paid by that recipient. An invoice cannot have two recipients.

This can sometimes create problems when you are raising an invoice for an insurance company who is only prepared to pay part of the patient's treatment. This is where the split invoice feature comes in. This works by deducting an amount off from the initial invoice and creating a second invoice with that amount for another recipient.

The following example will help to explain this better and will also show you how you can use it. **Insurance A** is invoiced for £100 on behalf of the treatment performed for **Patient B**. **Insurance A** is only prepared to pay £70 of this, leaving £30 to be paid by **Patient B**. To split this Invoice of £100 you would do the following:

- In the invoice click the **Split Invoice** button. The Split Invoice window will now appear.
- Half way down under Split Details is the search field of the recipient. In this case you would search on **Patient B**.
- Set the field **Split this amount:** to **£30.00**
- For this example we would leave the **Set the date to:** to remain as today's date
- Under Options tick the checkbox **Open the newly created invoice**.
- Click the **OK** button. A new invoice will open up for **Patient B** for £30.00. It will have the item description of Split from Invoice.
- Press the **Save and Close** button and click **No** to creating a payment. This takes you back to the invoice to **Insurance A**.
- You will note that this invoice also has a description of Split Invoice to. Click the **Enter Payment** button.
- Set the payment to £70 and fill in the other details. Now click **Save and Close** on the payment.
- Press the **Save and Close** on the Invoice which will now be paid off in full.

Split Invoice Window



In effect what you have done is created two invoices for two different recipients. The advantage of using the Split Invoice is that you can track where the invoice for **Patient B** came from and why they are paying for it. In this case the invoice would indicate that it is from a split invoice from **Insurance A**.

You will note that the Split Invoice window contains details such as the original invoice total, the amount already paid and the amount outstanding. You also have the options to split the invoice by a percentage or do a full split. There is also an option to use the same date of the original invoice.

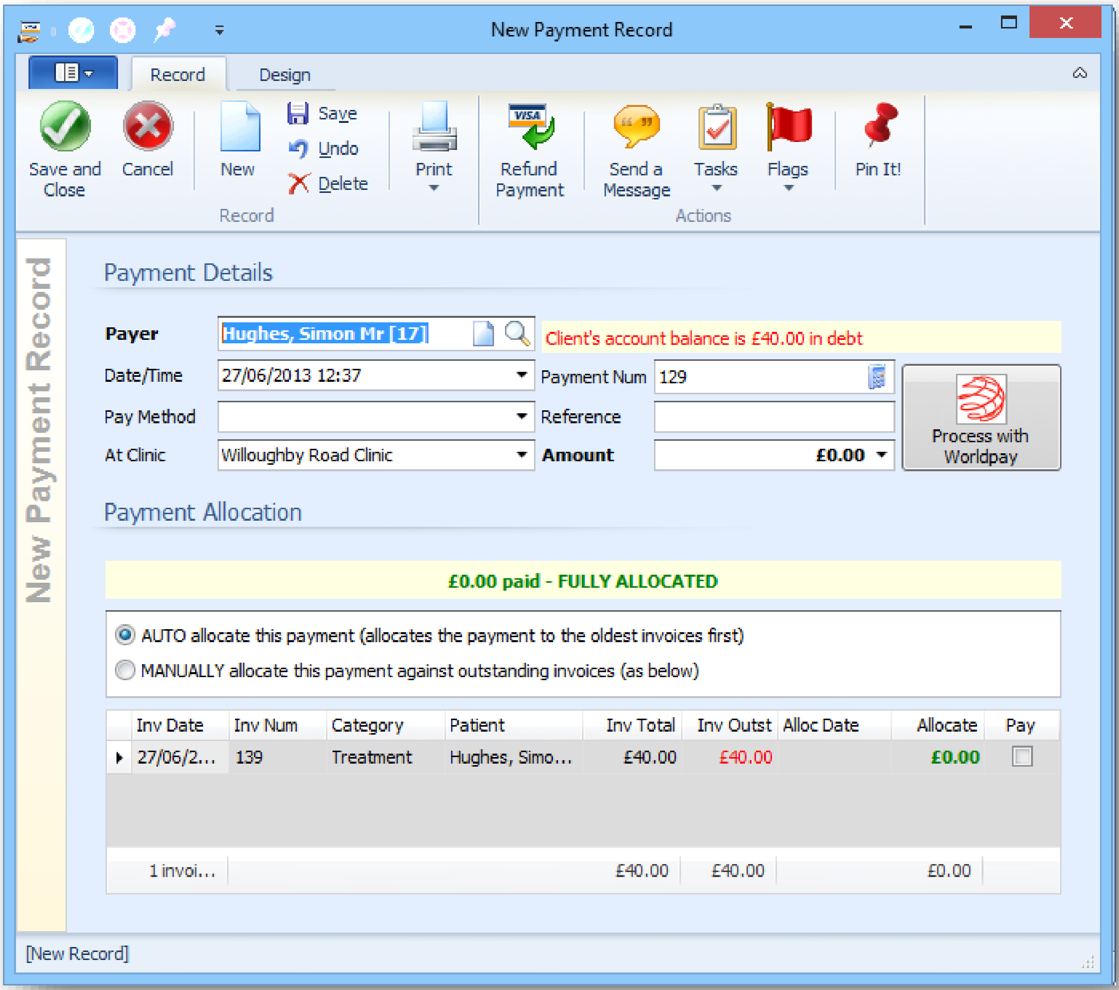
Entering Payments

There are many ways to access the Payment Editor.

- It automatically pops up after creating an Invoice or a Quick Transaction
- From the Appointment Diary right-click on the appointment and click **Receive Payment**
- From the **Home** menu in ClinicOffice ribbon bar click **New** then **Payment**
- From a patient or contact's editor click **Receive Payment**

All of these will bring you to the Payment Editor as shown below:-

New Payment Screen



The payment editor's fields are explained below.

Field Name	**Description**
Payer	This is the person making the payment.
Date / Time	This is the date and time the payment was made.
Payment Method	A category choice – usually cash, cheque or credit card. These can be edited. This is mandatory for Payments but is irrelevant for Credits.
At Clinic	The clinic that is receiving the payment.
Clients Balance	Shows the monies either in credit or debit on the patients account.
Payment Number	The unique (automatically generated) reference number for this payment.
Reference	An optional payment reference e.g. a cheque number
Amount	The amount being paid.
Process with Worldpay	You can process card details and take a credit/debit card payment via the Worldpay Terminal.

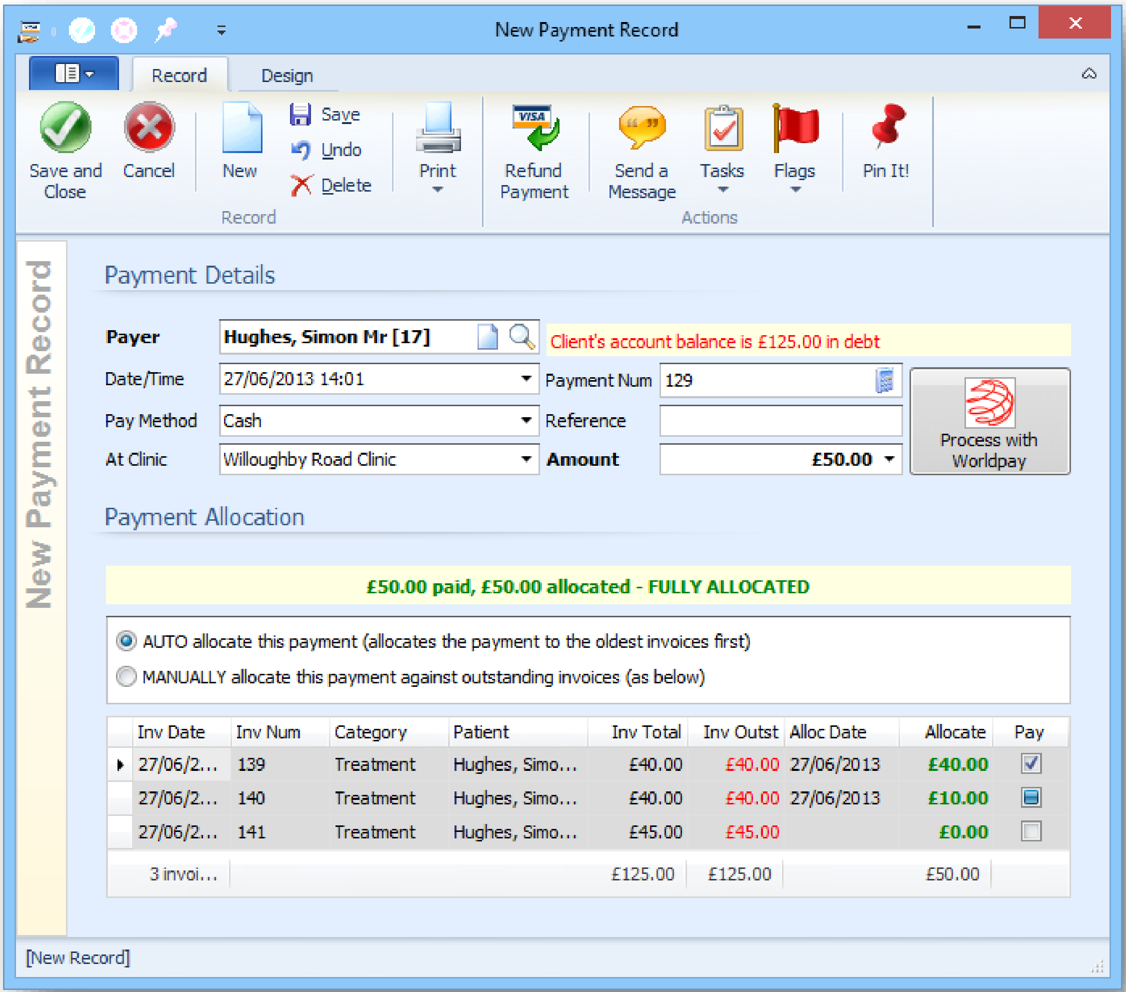
Allocating Payments

There are two options for allocating payments:

- Auto Allocate — This lets ClinicOffice automatically allocate the payment. The program will allocate the payment to the oldest outstanding invoice first, then any subsequent unpaid invoices in date order.
- Manual Allocation — This will then allow you to manually allocate the payment against any outstanding invoices.

A single payment can be allocated against multiple invoices. Notice in the example below there is numerous invoices outstanding for this patient:-

Multiple Payment Allocation



As you can see from this screen, the patient is paying £50 out of the £130 outstanding. If we use auto-allocation, then ClinicOffice will automatically pay off the oldest invoice, part-pay the second invoice and will leave the most recent invoice for £40 unpaid.

Alternatively, you could manually allocate the payment by selecting **Let me MANUALLY allocate this payment against outstanding invoices.** Then tick or un-tick the boxes in the Pay column to select the invoices you wish to pay. You may also enter in the amount you wish to pay in the Allocated column. ClinicOffice will warn you if the amount being paid and the amount allocated does not match.

When you have finished just click **Save and Close** and this will save the payment against the chosen invoices. Alternatively you can abandon any changes by clicking **Cancel**.

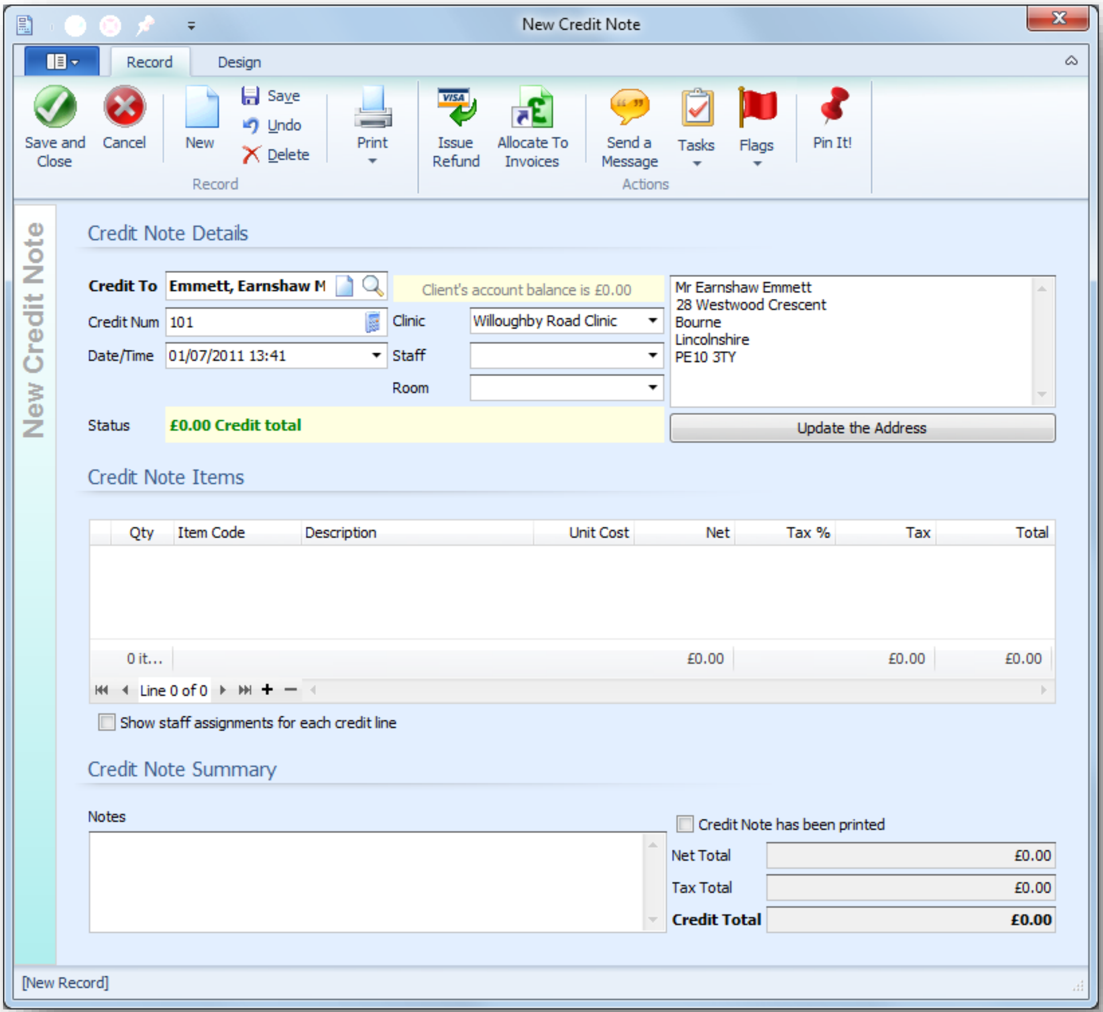
It is generally best to use the auto-allocate option. Manual allocation was designed mainly to be used when receiving a payment from Insurance Companies, as you will most likely need to monitor precisely which invoices are being paid when you receive a cheque from them. Manual allocation will though allow you to edit the allocation date of the payment to an invoice.

Issuing a Credit Note

A Credit Note is essentially the opposite of an Invoice. An Invoice is where the patient owes you money, while a Credit Note is where you owe the patient money. The basic purpose of a Credit Note is to affect patient's account balance positively (i.e. to 'credit' their account with an amount). Here are some examples when you might raise a Credit Note for a customer:

1. As a gift voucher which can be used at a later date against an invoice
2. A patient complains about a £30 invoice, so you only take a £20 payment from him/her and raise a Credit Note for remaining £10 on the invoice.
3. A patient disputes an invoice and refuses to pay it. After a period of time, you decide to write it off as a 'bad debt' so you raise a Credit Note to the same value as the invoice.
4. You need to refund a patient for some goods or a service. You first need to raise a Credit Note and then issue a Refund against the Credit Note.

The Credit Note Editor



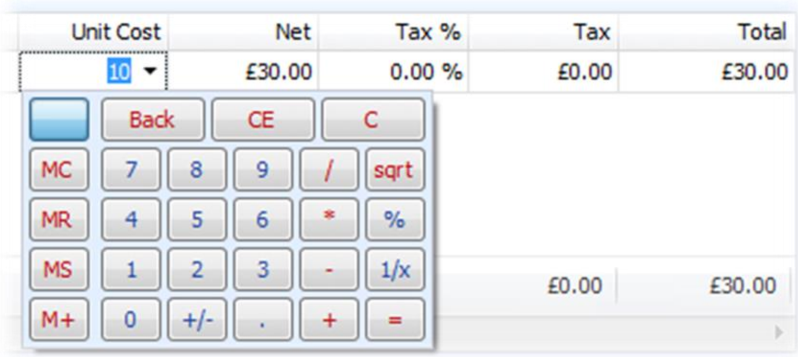
Field Name	Description
Credit To	Here we select the Credit Note recipient.
Credit Number	A unique number which identifies this Credit Note.
Date/Time	This is the Date and Time that the Credit Note was created.
Clinic	The clinic from which the Credit Note is being issued.
Staff	The staff member to whom the Credit Note is assigned.

Room	You can assign a room to the Credit Note which is useful if you want to track the finances by different rooms at your practice.
Status	Shows the total Credit, the amount allocated and unallocated. If you right click on the text you can select to allocate the Credit Note to an Invoice or make a Refund. From this same menu you can also see the invoice(s) that it is being allocated to.
Credit Note Items	This section allows you to add/remove/edit the items that will be credited.
Address	This is the address for the recipient of the Credit Note. Clicking the **Update the Address** button will insert the recipient's address.

To create a gift voucher (or something of this nature) open the patient's record, click the **Financial** button and select **Raise Credit Note**. You need to give the Credit Note a value, which you can do by adding a line to the Credit Note Items. This is identical to adding a line to an Invoice (see the section "Adding Lines to an Invoice"). You can then assign this Credit Note to an Invoice at a later date.

If you have an Invoice that you wish to balance or write off, it would be best to raise the Credit Note from the Invoice. To do this, click the **Create Credit Note** button (located on the Invoice's ribbon bar). A value will automatically be filled in for the Credit Note. If you are balancing an invoice you may wish to reduce the value of the Credit Note. For example if the invoice is for £30 and £20 has been paid off then you can reduce the amount on the Credit Note to £10. To do this left click on the value under the Unit Cost column.

Changing Unit Cost on a Credit Note



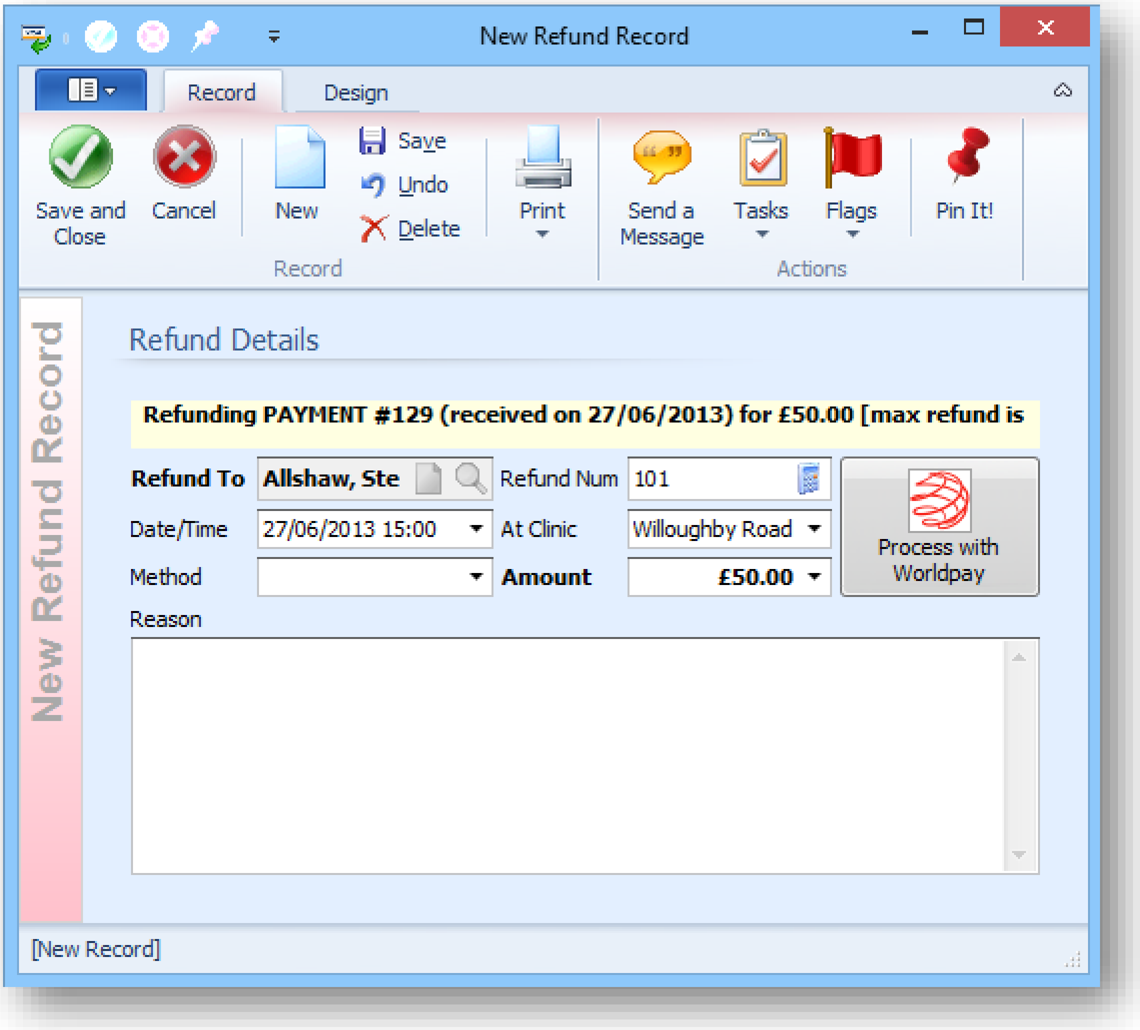
Once you have done this, you now need to allocate the Credit Note to the Invoice. To do this, click the **Allocate To Invoices** button (located on the Credit Note's ribbon bar). The Credit Note to Invoice Allocation window will now appear. By default it will be setup to auto-allocate the Credit Note but you can choose to manually allocate it. This works in the same way as allocating a payment (see the section "Allocating Payments"). Once you are happy with the allocation click the **OK** button and you will be taken back to the Credit Note. You will now notice that the Credit Note's status will say "Credit is Fully Allocated".

Issuing a Refund

A refund is where money is leaving the company and is going to another. There are two different scenarios when a refund might be issued: -

1) Refund for Goods or Services (e.g. if goods are being returned or perhaps a service was unsatisfactory and a refund is agreed)
2) Refund for a Pre-Payment (e.g. a patient pre-pays for 3 treatments, but only has 2 and then wants a refund for the third)

The Refund Editor



Field Name	Description
Refund To	This is the person the refund is going to.
Date/Time	The date and time the refund is being given on.
Method	The method that you will be paying the refund with (i.e. Cash, Cheque, Credit Card).
Refund Number	A unique number which identifies this Refund.
At Clinic	The clinic that the refund is coming from.
Amount	The amount being refunded.
Process with Worldpay	With this button you can refund a card payment via the Worldpay card terminal so long as the card entered matches the card that made the original payment.
Reason	Any reasons for the refund being given.

1) Refund for Goods or Services

Example: A patient has a treatment for £20 and buys an ice pack for £15. An invoice is raised for £35 and the patient has paid it. The ice pack splits when the patient arrives home and they want a refund.

1. Go to the Patient Record, click the Finances tab and open the invoice in question (i.e. the invoice which is being refunded)
2. From the Invoice Editor, click Create Credit Note
3. A Credit Note is created which mirrors the original invoice. You now need to adjust the Credit Note so that the only items listed are those being returned/refunded
4. Now click the Issue Refund button (from the Credit Note Editor)
5. In the Refund Editor, select the Payment Method and enter the Amount being refunded
6. Click Save and Close

You can now close the Credit Note Editor and the Invoice Editor which should take you back to the Patient Editor. You'll notice on their Finances screen that a new Credit Note has been created and also a new Refund, which has been issued against the Credit Note.

2) Refund for a Pre-Payment

Example: a patient pre-pays for 3 appointments at £30 each (i.e. £90). He completes 2 appointments but feels there is no need for the third, so he requests a refund.

1. Go to the Patient Record, click the Finances tab and open the Payment in question (i.e. the pre-payment which is being refunded)
2. From the Payment Editor, click the Refund Payment button
3. In the Refund Editor, select the Payment Method and enter the Amount being refunded
4. Click Save and Close

You can now close the Payment Editor which should take you back to the Patient Editor. You'll notice on their Finances screen that a new Refund has been created which has been applied against the pre-payment.

The reason why the first scenario needed a Credit Note and the second one did not is in the first scenario, the refund must NOT affect the patient's account balance e.g. The patient is invoiced £20 for an item (their balance is -£20), they pay £20 (their balance is £0). They want a refund. A credit note is created (taking the balance to +£20) and a £20 refund is issued (returning their account balance to £0).

In other words, when issuing a refund for goods or services which have already been paid for, the patient's account balance should not be altered at all; hence the need to raise a Credit Note and a Refund which balance each other out.

In the second scenario, you are refunding a payment which has not yet been allocated against an invoice, so we DO want the refund to affect the account balance e.g. The patient pre-pays £90 (balance +£90), they are invoiced for £60 (balance now +£30) then they request a refund. The £30 refund is allocated directly against the payment; hence their balance is now £0.

The bottom line is that refunds must always be allocated either against a Credit Note (which won't affect the account balance) or against an unallocated Payment (which will affect the balance).

This can be a difficult topic to get your head round, but if you simply follow the above rules then there shouldn't really be any problems!

The Charging System

The charging system is closely linked to invoices and can be used to raise multiple charges for different appointments and then raised onto a single invoice. In some practices a single invoice per appointment is acceptable and hence the charging system is not necessary. However other practices may require that multiple appointments are covered by a single invoice.

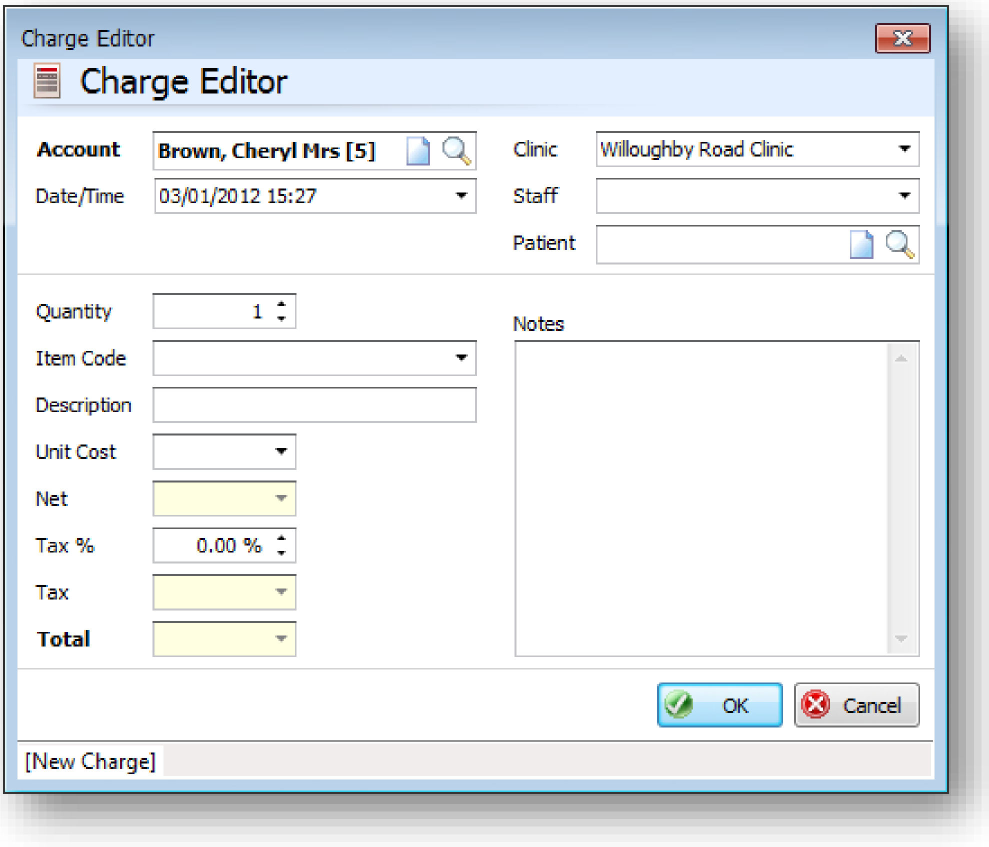
An example of where the charging system could be used is where a course of treatments would span 10 appointments. Each appointment date will need to be displayed to show what the invoice covers. In this situation a charge would be created on each appointment. Then at the end of the tenth appointment an invoice would be raised from the charges. Each charge will appear on that invoice as separate lines. Below will explain how this can be done.

A charge can be raised two ways. The first is to create it via an appointment. This can be done by right clicking on an appointment in the diary and selecting **Add Charge**.

The second option is to create the charge via a patient's record. This can be done by opening the patient's record, going to the Finances tab, clicking the blue link at the bottom of the page "Go to 'Pending Charges' screen". On the Pending Charges screen which will open click the **Add Charge** button.

With either option the following window will appear:

Charge Editor



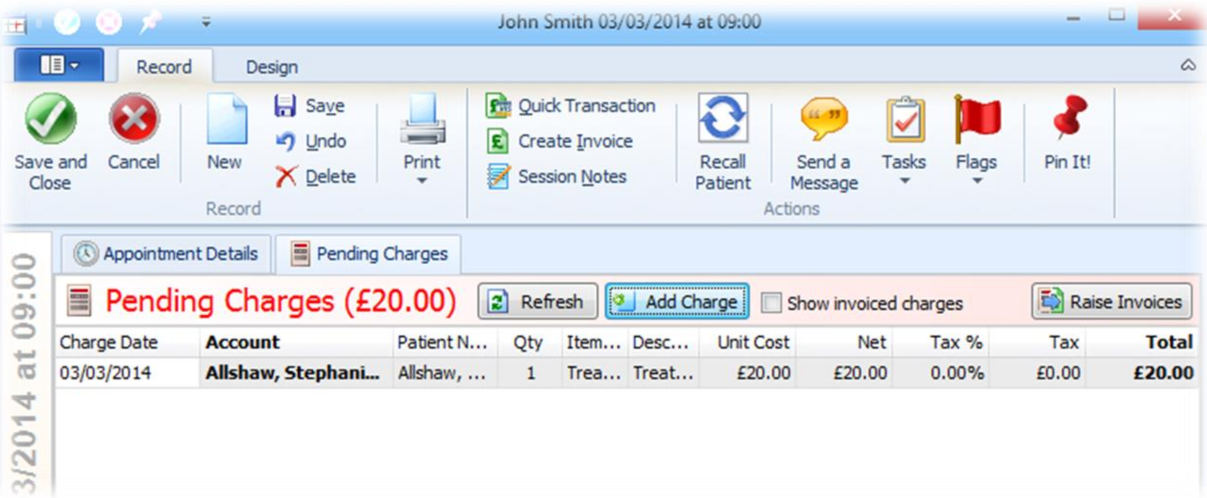
The charge editor consists of the following fields:

Field Name	Description
Account	This is the account that the charge is being assigned to.
Date/Time	The date and time of when the charge has been raised.
Clinic	This is the clinic that the charge is being allocated against.
Staff	This is the staff member the charge is being allocated against.
Patient	This is the patient that the charge has been created for. This can be different to the Account.
Quantity	If the charge is for an item then you can specify the quantity of the item here.
Item Code	This is the code for either the item or service that the charge is being created for.
Description	This is the description given to the item or service.
Unit Cost	This is the cost for the item/service.

Net	This is the quantity multiplied by the unit cost before tax.
Tax %	You can set the amount of tax percentage if tax is applicable.
Tax	This is the tax cost.
Total	This is the quantity multiplied by the unit cost and includes any tax.

If you raise the charge via an appointment then the item code will automatically be filled in so long as the appointment has a Charge Item that has been assigned to it. Once you have created the charge in this manner it will than attach itself to the appointment and can be viewed in the appointment under the **Pending Charges** tab.

Pending Charges on an Appointment

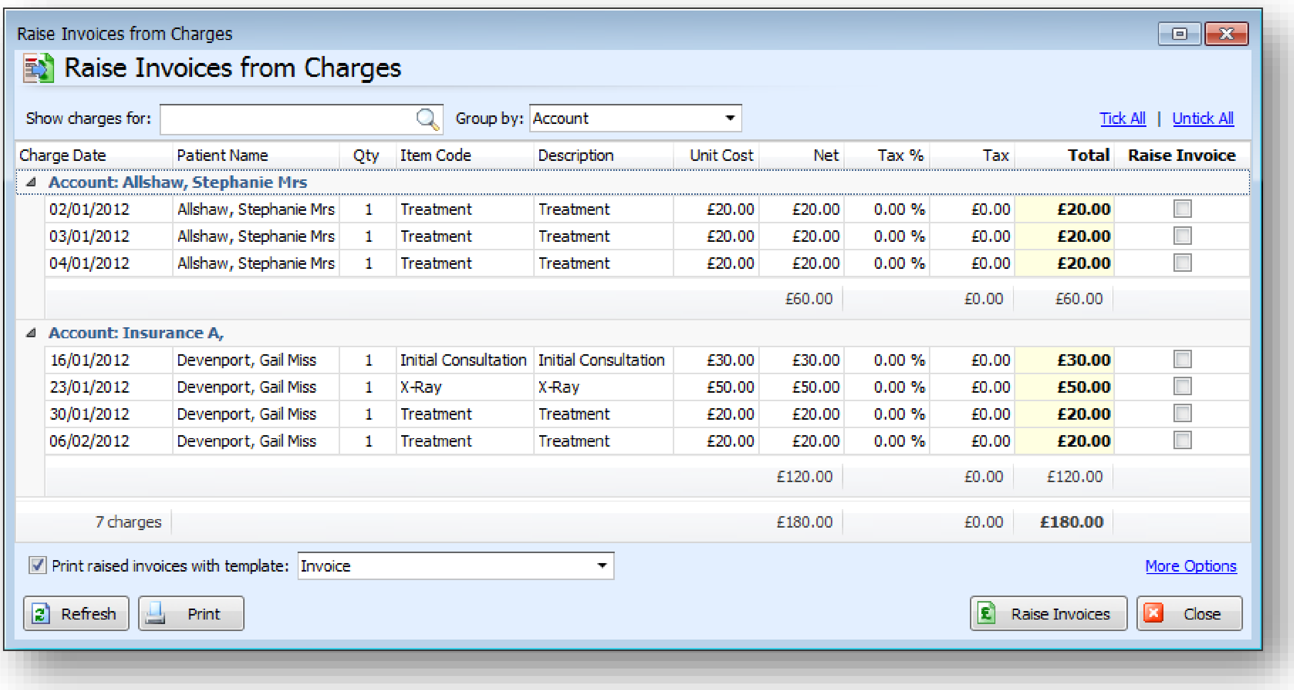


The Pending Charges on the appointment is identical to the Pending Charges screen that will appear if you opened it via the patient's or contact's record. The only difference is that the appointment's Pending Charges will only show charges related to that appointment rather than all charges related to the recipient's account.

On either screen you can add an additional charge by clicking the **Add Charge** button. Any charges which have been raised onto an invoice will no longer appear on this grid unless the check box "Show invoiced charges" has been ticked.

To raise an invoice from the charges you can click the **Raise Invoices** button from the appointment. The following screen will appear.

Raise Invoices from Charges



This window can also be opened via the **Home** tab, by clicking the drop down menu on the **Finances** button and selecting the **Raise Invoices**. In either case you can view all charges which are pending to be raised as an invoice.

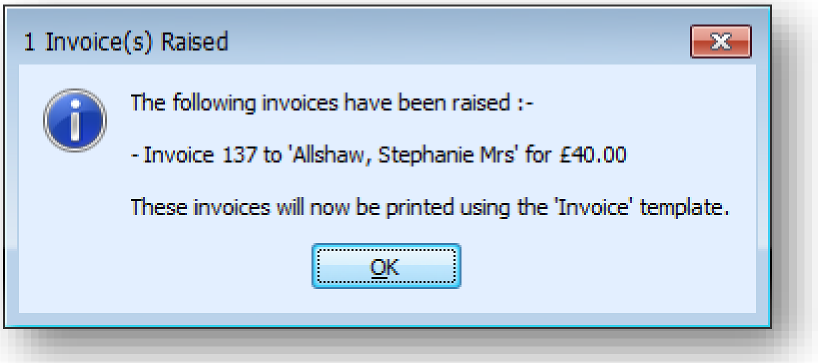
If you have opened this via an appointment or patient record the grid will by default search on only the patient's name. You will see their name in the "Show charges for" field, you can however remove this. Like all search fields if you search on a blank value then all records will appear; in this case all charges will appear.

You will note that by default the grid is grouped by "Account", however you can choose to group the grid by "Month", "Patient" or "No grouping" which removes grouping altogether.

Raising Invoices from Charges

To raise an invoice from the "Raise Invoices from Charges" screen just tick the charges you wish to add and click the **Raise Invoice** button. What will happen is that a message will appear indicating who the invoice has been raised for and the amount. Like the example below:

Raised Invoices Message



If charges for more than one account have been selected then separate invoices will be raised; one invoice for each account. If this is the case the message above will display each invoice along with its amount and recipient. Also the invoice count will appear to the top right of the message.

On the "Raise Invoices from Charges" screen if you have the option **Print raised invoice with template** ticked then you can select an invoice template report to merge with the newly created invoices after they have been raised. This will appear after you have clicked **OK** on the Raised Invoice message.

Raise Invoices from Charges Options

There are a number of options you can select for the **Raise Invoice from Charges** screen. You can view these by clicking on the **Show Options** blue link.

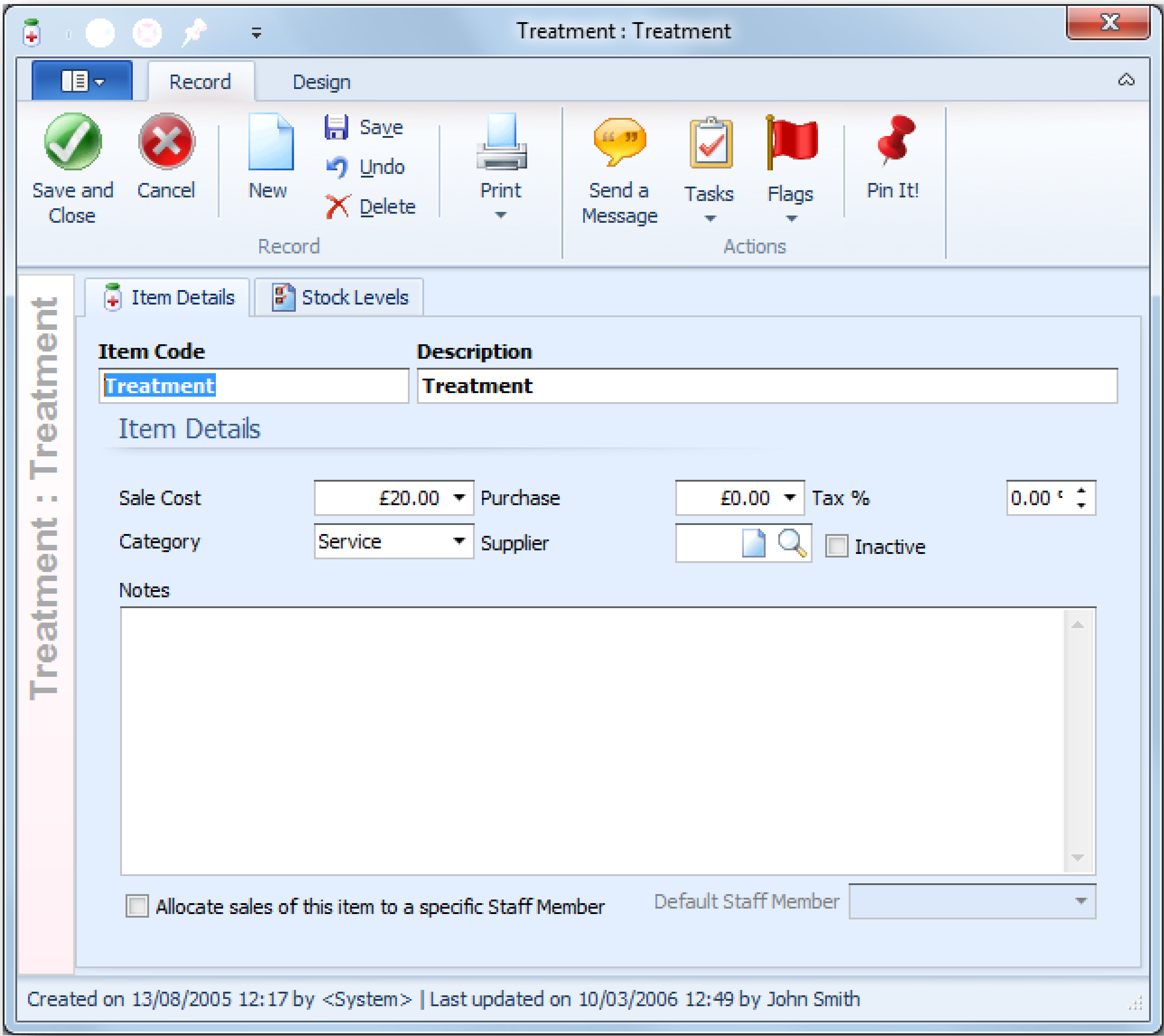
The options are made up of two parts: the **Invoice Creation Options** and **View Options**. The Invoice Creation Options will effect what appears on the invoice when you raise it. The View Options will affect the grid view on the "Raise Invoices from Charges".

Invoice Creation Options	
Create separate invoice for each patient	Invoices are usually grouped by the invoice recipient; when this option is ticked though a separate invoice will be raised for each patient.
Back-date invoice to most recent charge.	By default ClinicOffice will set the invoice date to today's date. If this option is ticked, the date of the invoice will match that of the most recent charge it is being raised from.
Patient Name	This will add the patient's name to the invoice's line description.
Staff Name	This will add the practitioner's name to the invoice's line description.
Appointment Details	This will add the appointment date/time, appointment type and the practitioner's name to the invoice's line description.
Patient Insurance Ref	This will add the patient's insurance reference to the invoice's line description.
Custom Field 1 and 2	You can specify for either one or two custom fields to be added to the invoice's line description.
View Options	
All Clinics	If you have more than one clinic then when you select this you will see charges pertaining to all clinics.
Only the Active Clinic	This will only show charges pertaining to the current clinic you are viewing,
Show additional notes	This will show an additional line under each charge on the grid. The information that is displayed is the appointment date/time, appointment type and the practitioner's name.

The Item Editor

As with all the other editors this screen allows you to view and/or edit the details of a product or service.

The Item Editor



Field Name	**Description**
Item Code	The code of this Item/Product/Service as it will appear on an invoice.
Description	The full description that will appear on the invoice.
Sale Cost	The cost for one of these items/services to your customers.
Purchase	The cost to the clinic.
Tax %	Defaults to the default tax percent is for your clinic – see the Program Settings topic. Leave as 0% if you don't charge tax or 17.5% for VAT for example.
Category	Allows you to categorise this item – e.g. 'product' or 'service'.
Supplier	Used for products – the person/company who supplies this product to you
Inactive	Tick this if the item or service is not currently being used and you do not want to see it as if it was active, but you do not want to delete it as you may need it for a later occasion.
Notes	Any additional notes you wish to make about the item or service.

By filling in this information for every product or service, the correct information will appear in the drop down menu in the Invoice Editor. This will include the cost and any tax amount for the product or service. This will save you time looking for the cost of everything, every time you create an invoice.

As usual, you can save this record by clicking **Save and Close** or cancel any changes by clicking **Cancel** from the ribbon bar on the editor.

Stock Control

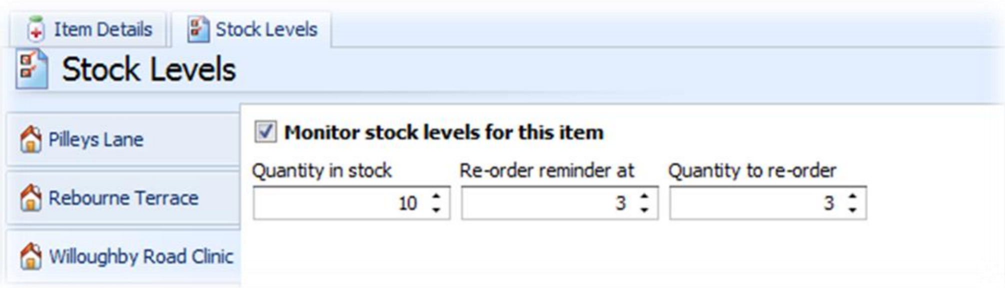
If it is an item that you are creating you may wish to monitor the stock levels. At the top of the Item Editor there is a tab called **Stock Levels**. After clicking on it you may notice that the section is greyed out and unavailable. In order to use it you have to save the item first by pressing the **SAVE** button on the Item Editor's ribbon bar; this can now be used.

The functions of the **Stock Levels** section is as follows:-

Monitor stock levels for this item	Once ticked ClinicOffice will begin to monitor the stock levels for this item.
Quantity in Stock	The current quantity in stock.
Re-Order reminder at	The minimum amount you would like to keep in stock (The amount at which you would like to re-order Reminder).
Quantity to re-order	The quantity of the product that you would like to re-order.

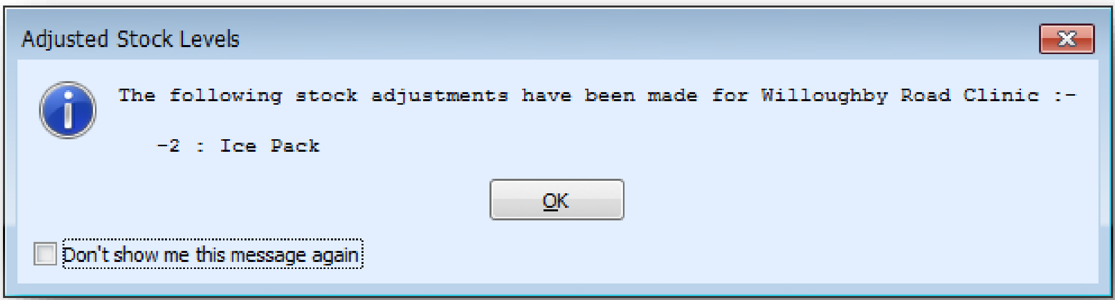
You can monitor the stock levels for each clinic separately. An additional clinic will be represented by an extra tab. Make sure that the **Monitor stock levels for this item** is ticked for the clinic you wish to monitor.

Stock Levels with Multiple Clinics



Once this is all set up and you have saved it, ClinicOffice will begin to detect the item's quantity every time it is used in an invoice or charge. Just after saving an invoice or charge which has a monitored item included, the following message will appear:-

Stock Level Adjustment Message



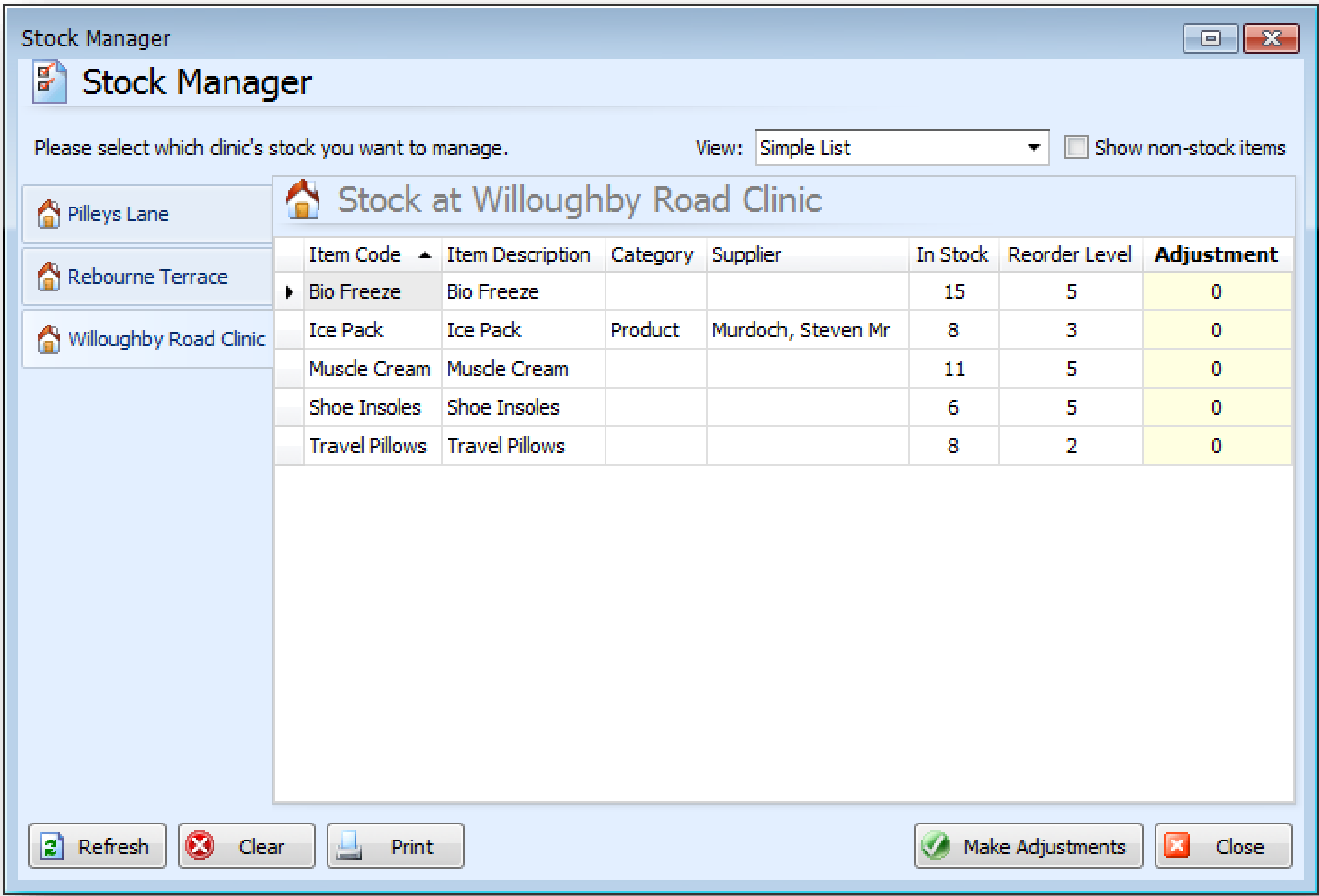
As can be seen the message indicates the number of items deducted. You can stop this message from appearing by ticking the **Don't show me this message again**.

Stock Manager

The Stock Manager is designed to monitor and change the stock levels of all your items within the database. This means that if you have a large delivery that has just come in and you need to change several quantities, this can all be done from this editor.

You can access the Stock Manager by either going to the **Tools** menu, then clicking the **Stock Manager** button or go to the **Home** menu, click on the **Finances** menu and then select **Stock Control Manager**. You can also access it from the Finance Centre.

Stock Manager Editor



To make an adjustment to the stock levels enter a value into the Adjustment column. You will notice that when you enter a positive value the text turns a bold green (you are increasing the stock) and a negative value produces a bold red (you are deducting from the stock). If the text has not changed colour press the **REFRESH** button. To make the desired alterations click the **MAKE ADJUSTMENTS** button; all stock levels will change accordingly. If you wish to clear the values from the **Adjustments** column press the **CLEAR** button.

If the **In Stock** column is smaller than the **Reorder Level** column then the product's row will be highlighted in red. This indicates that you have to reorder new stock for that product.

Within the Stock Manager Editor you can only edit the stock levels, but if you need to edit any further details (i.e. the Item Code) you can double-click on one of the products to open the Item editor.

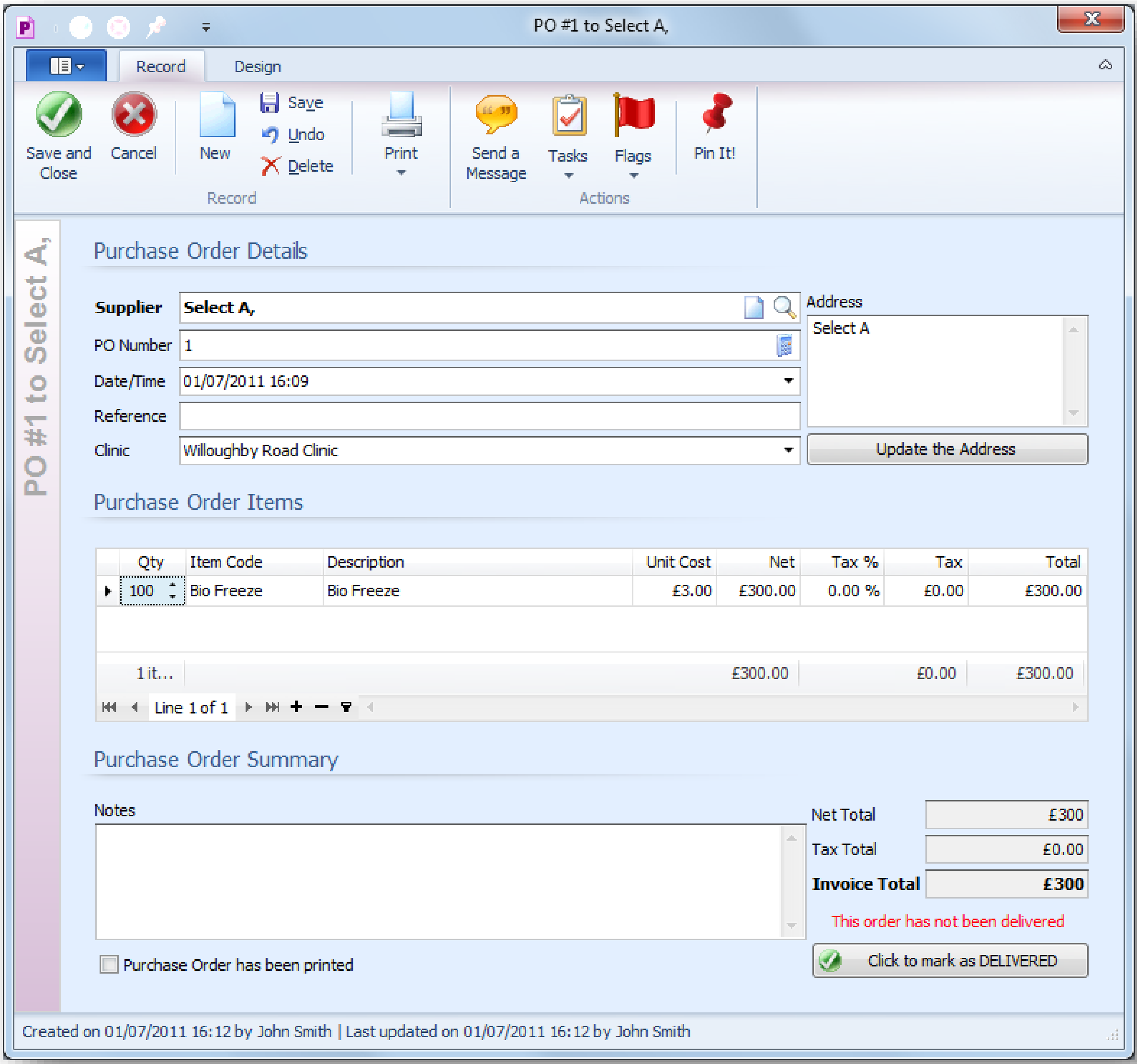
You may notice that a particular product is not displayed in the Stock Manager; this means it is not being monitored. You can display this by ticking the box which says **Show non-stock items** this will display all items/services; you can now open up the product and select to monitor it (make sure that the correct clinic is being monitored for that product). All non-monitored products will be displayed in grey.

Down the left hand side are the Clinical tabs. By clicking on one of them you will see the stock and products for that clinic. Along the top you will see the **View** menu; this allows you to group the products by a group (i.e. Supplier). You can print the grid by pressing the **PRINT** button. Once you are finished press the **CLOSE** button.

Purchase Order Editor

A purchase order is a commercial document which is issued by a buyer to the seller. It indicates the types, quantities, and agreed prices for products or services the seller will provide to the buyer. Sending a Purchase Order to a supplier constitutes a legal offer to buy products or services. Acceptance of a Purchase Order by a seller usually forms a one-off contract between the buyer and seller, so no contract exists until the Purchase Order is accepted. A purchase order will very often be issued when the stock levels for an item become low.

Purchase Order Editor



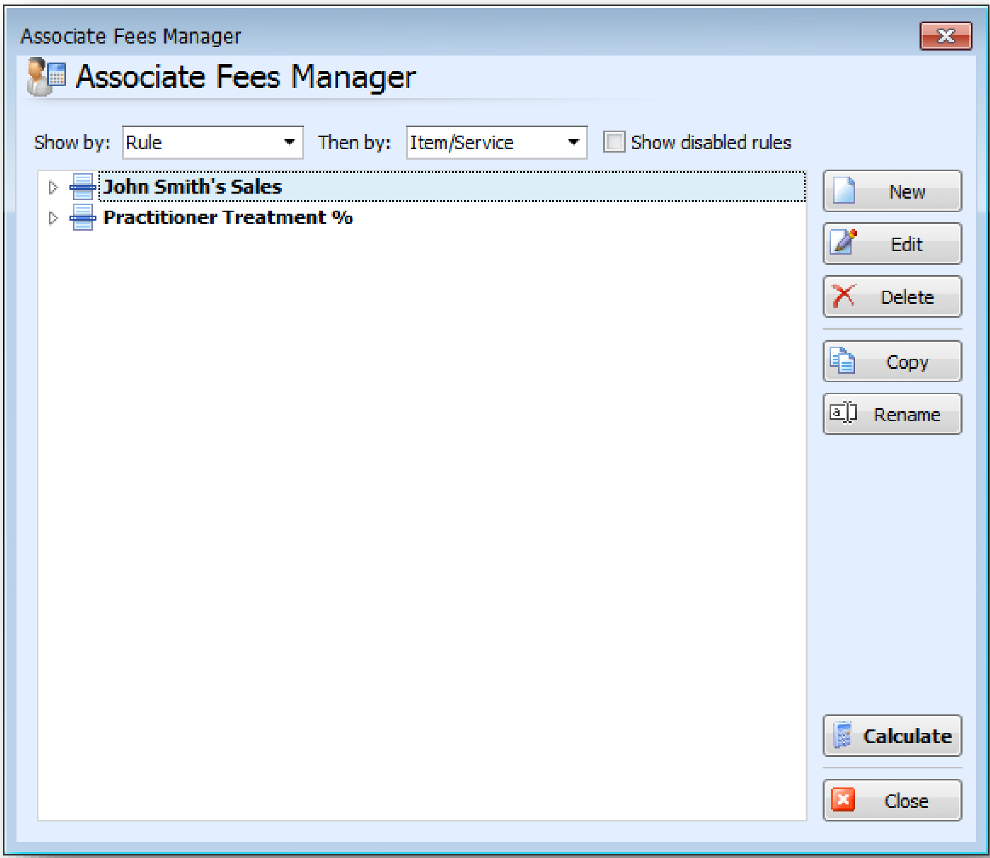
Field Name	Description
Supplier	This would be the seller's contact record
PO Number	This is the unique number that identifies the Purchase Order
Date/Time	This is the date and time that the Purchase Order was created
Reference	This would be the reference between you and the seller
Clinic	This is the Clinic that the Purchase Order is being sent from
Address	This is the seller's address
Purchase Order Items	These would be the items that you are purchasing from the seller
Click to Mark as Delivered	Marks the order as being delivered and will add the item(s) quantity to stock

To create a new purchase order, click on the lower half of the **Finances** button, located on the **Home** tab and select **Purchase Order**. This will take you to the purchase order grid. Right-click anywhere on the grid and select **New Purchase Order**. Fill in your details and press **Save and Close** when you have finished.

Associate Fees

In some clinics it is common practice to pay a practitioner either a percentage or set amount of money which is based on the number of treatments they perform or the items they may have sold. The Associate Fees is designed to help clinics calculate how much they owe their practitioners.

You can access the Associate Fees either via the **Finances** button on the **Home** tab or via the **Tools** tab.



The Associate Fees Manager screen will allow you to view the rules in different ways. How this works is that the rules would be grouped by two active categories. The categories that you can select between are "Rule", "Item Service" and "Staff Member". So you could group the rules by "Staff Member" and then by "Item/Service". This displays each staff member's name that has a rule assigned to them. You can then expand each name and see which items/services are being assigned to them and then the rule(s) pertaining to that staff member with that item/service. You can alter these settings to see what best suits you.

Before you can calculate how much you owe a practitioner you need to first of all create a rule or rules depending on your requirements. Below is an example of how you would create a new rule and then use the rule to calculate the amount you owe your practitioners. In this example we will want to pay all practitioners within the clinic 75% of the value of the treatments they have performed.

1) Click the **New** button.

2) On the Associate Fees Rule Editor window that appears type in the name of the rule on the **Rule Name** field.

3) Just below the **Rule Name** field are two options to pay staff by based on either "a percentage" or "a fixed amount". In this situation we will select "a percentage" and set this to 75%. This means that 75% of any item/service we select later will be assigned to the practitioners.

4) You can decide whether the staff member is paid based on the invoice being raised or when you received a payment for the invoice by selecting either "an invoice is raised" or "payment is actually received". In this example we will select "**an invoice is raised**".

   With the invoice option you can also select to "**Process credit notes as negative fees**". When ticked, this will factor in invoices that have been raised in conjunction with refunds and will appear as a negative figure.

5) Under the section “This rule applies to” select “**only these selected items & services**”.

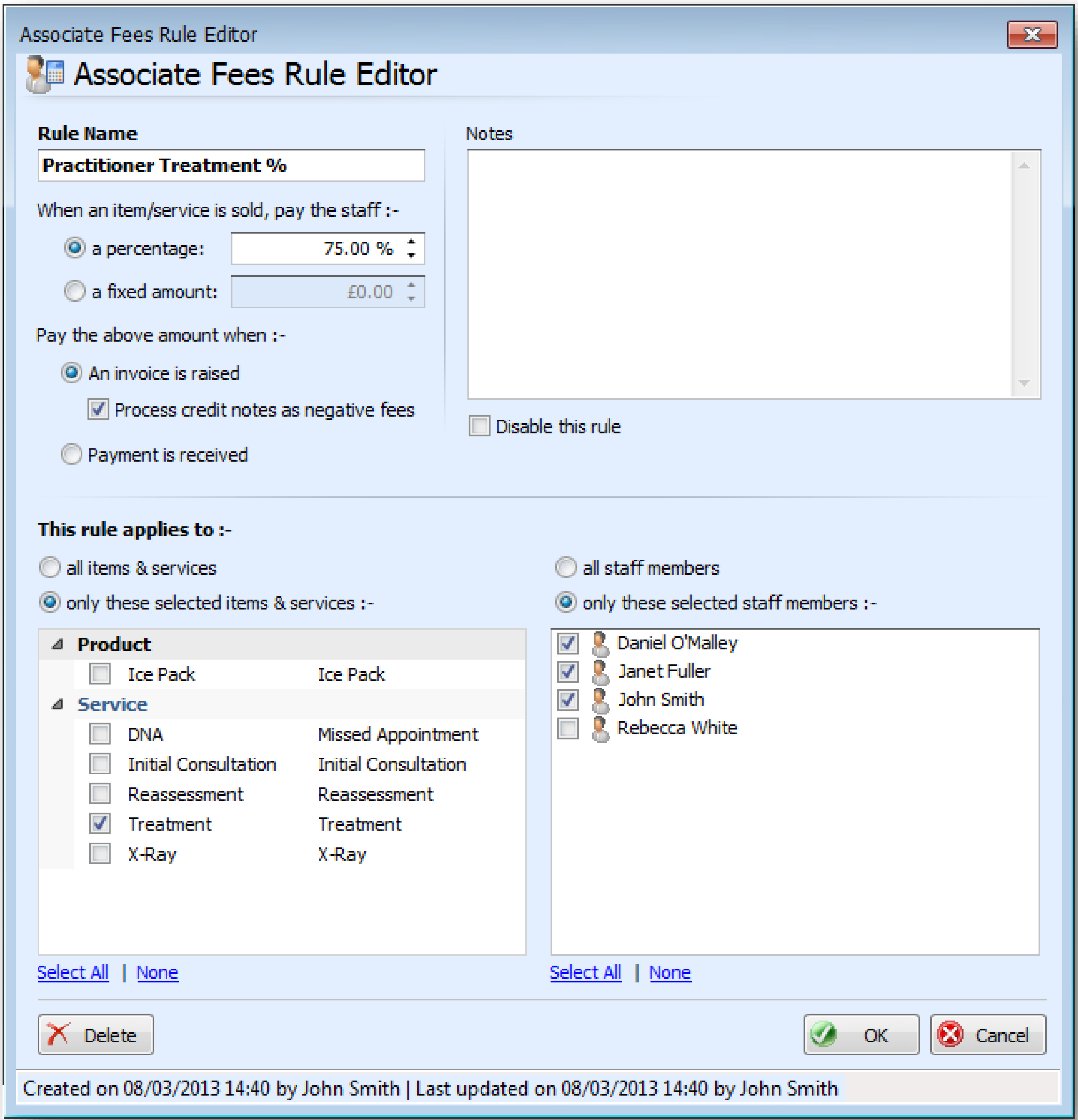
6) We can now selected individual items/services that this rule is applicable for. In this example we will click **None** (blue link at the bottom of screen), to unselect everything and then tick only the **Treatment** item.

7) Just to the right of this select “only these selected staff members”.

8) In this example we would select all active practitioners from the list of staff members**.**

9) When you are finished click the **OK** button

The Associate Fees Rule Editor will look something like the window below.



If you no longer require this rule then you can click the **Delete** button, towards the bottom left of the screen. If you wish to keep the rule but do not wish to delete it then you can choose to disable it by ticking the “**Disable this rule**”. This way you can access the rule later but at least it will not be calculated.

Once the rule(s) has been created you can then select to calculate how much you owe your practitioners based on it. To do this, please follow the following steps:

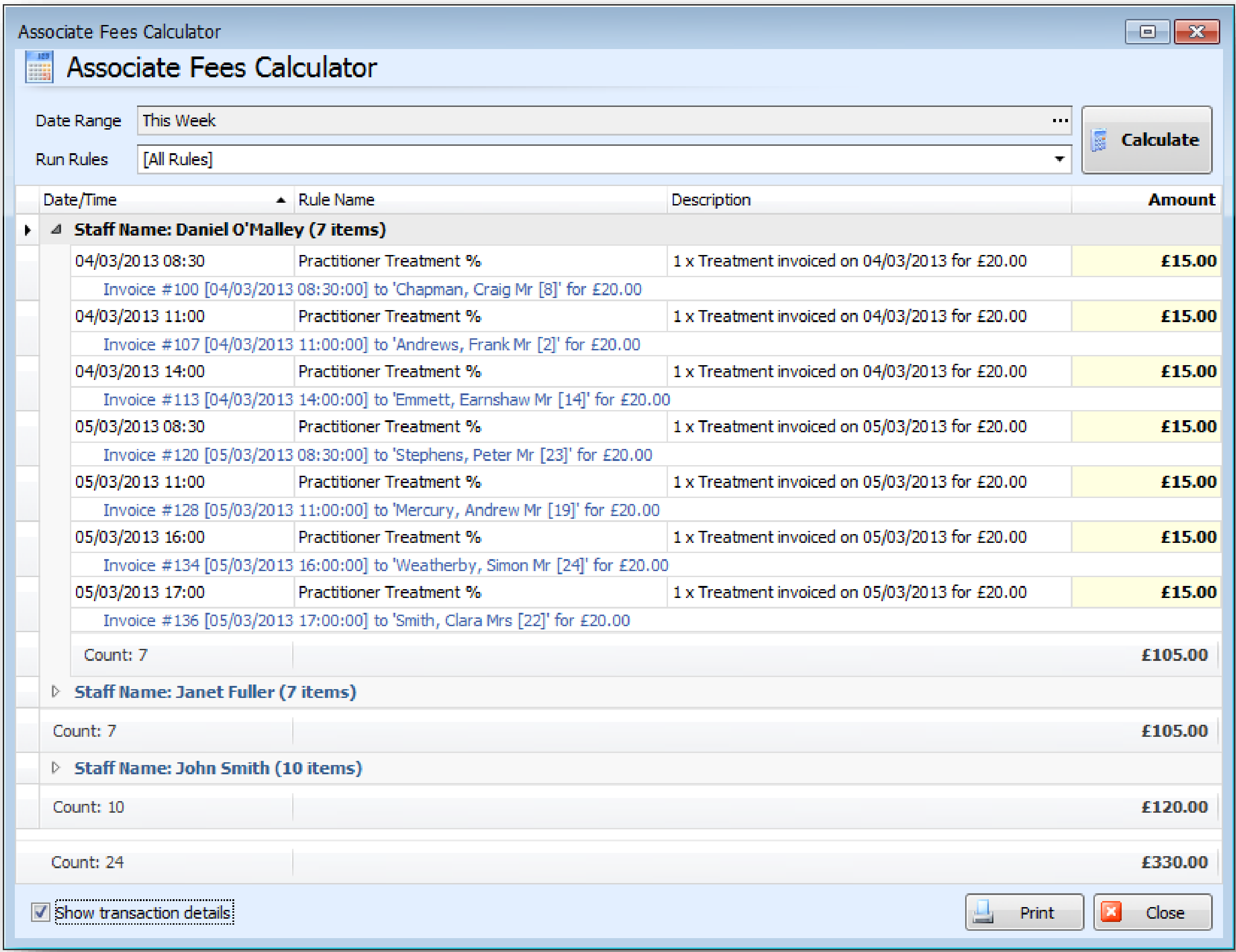
1) Click the **Calculate** button on the Associate Fees Manager window.

2) The Associate Fees Calculator window will appear. Select the **Date Range** you wish to calculate.

3) Click on the **Calculate** button.

The associate fees will now be calculated and the results displayed in a grid format. The grid will be grouped by the practitioner's name. You can expand on each staff member's name and see the breakdown of the amount owed to each staff member.

Associate Fees Calculator



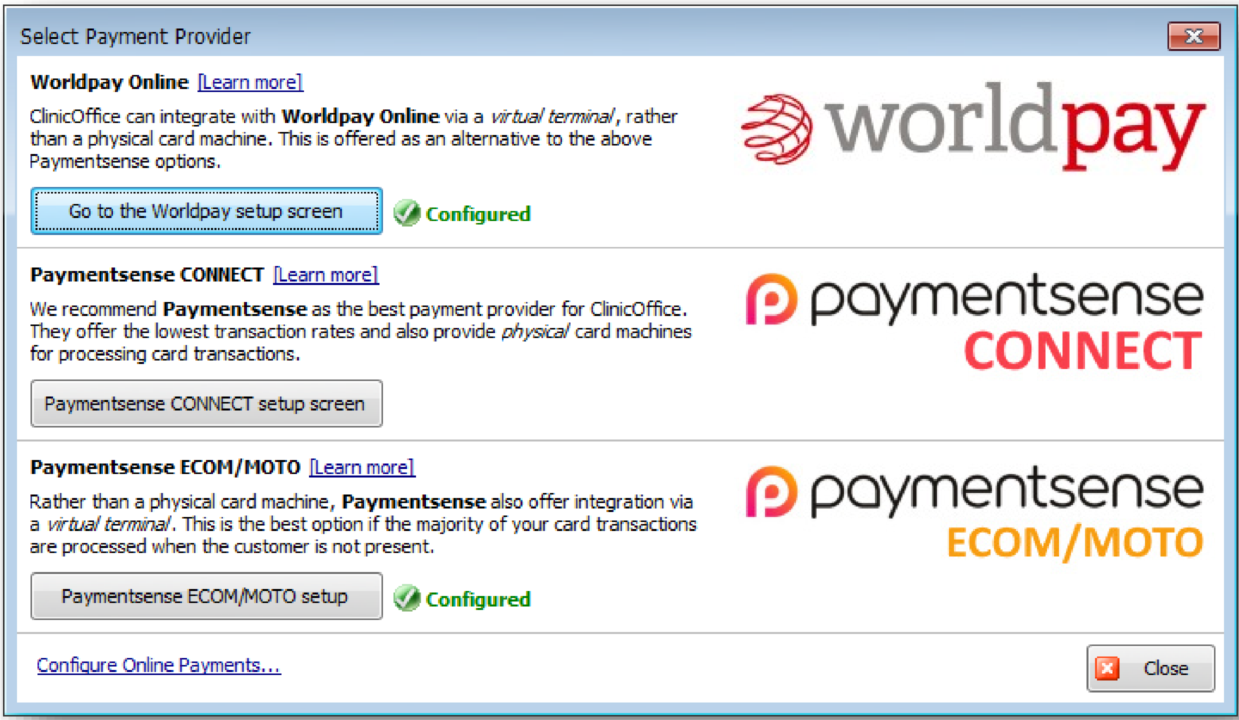
You can choose to hide the additional transaction details by un-ticking the checkbox in the bottom right hand corner "Show transaction details". If you have many rules and you wish to calculate only one or a select few, you can do so by clicking on the **Run Rules** field and ticking the relevant rules you wish to run on this occasion.

You can print this grid off by clicking on the **Print** button. When you are finished, click the **Close** button.

Processing Credit/Debit Cards

ClinicOffice will allow you to enter and process credit or debit cards. The program integrates with three different services: Paymentsense Connect, Paymentsense ECOM/MOTO and Worldpay. You may have noted that on the Quick Transaction, Payment and Refund windows there is a "**Process Payment**" button. When you click on this it will open a terminal window for whichever service you are using.

Before you can process card payments through ClinicOffice you will first need to sign up for either a Paymentsense or a Worldpay Online account. You can do this by going to the **View** menu, clicking on the **Program Settings** button, going to the **Global Settings** tab and click the blue link "**Setup Payment Provider**". The screen below will now appear.



Should you wish to learn more about either provider just click on the prospective links "Learn more about…". You will note on this screen a fourth option called "Cardsave". This option is only relevant for customers that have a Cardsave account because Cardsave was bought over by Worldpay and so new customers would apply only for a Worldpay Online account.

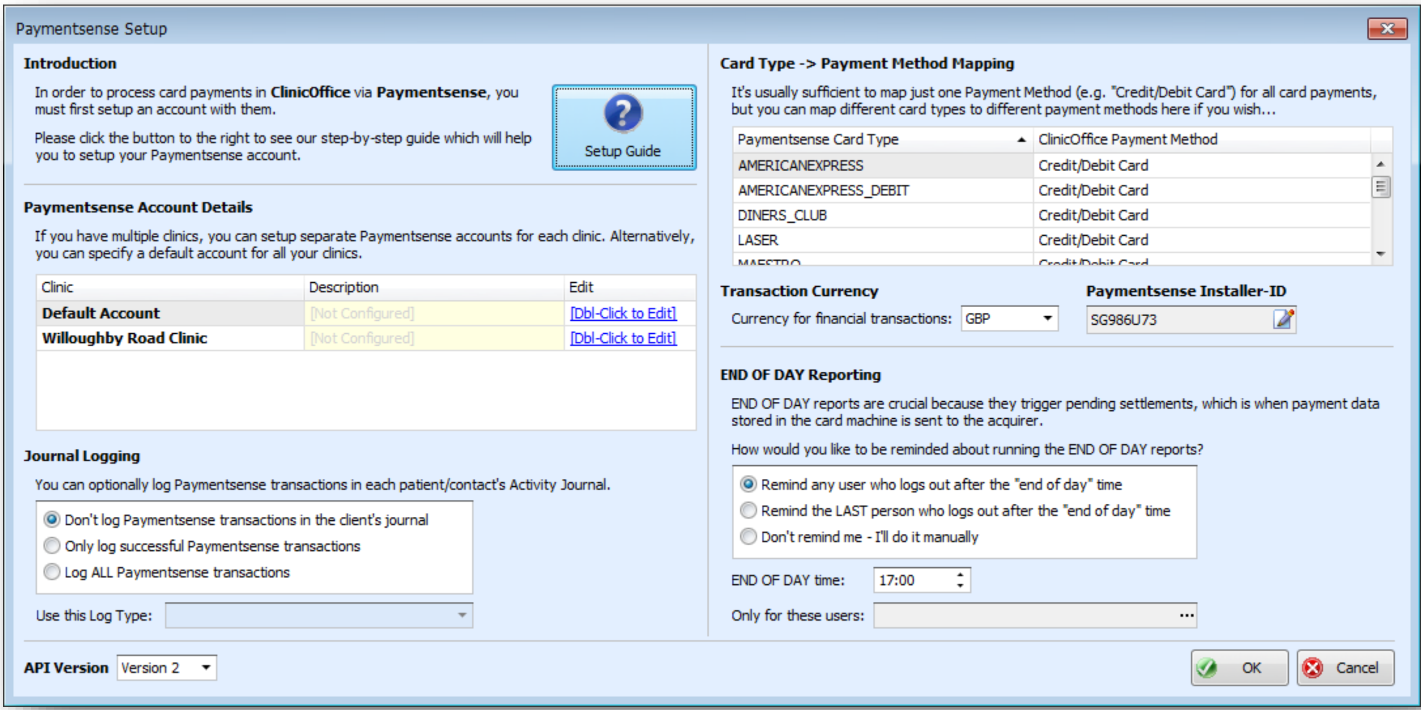
Q. Which payment provider should I choose?

A. It is dependent on how you wish to process card payments. If you require a physical card machine, then you will need to sign up for a Paymentsense Connect account as we can directly integrate with their card machines. If you prefer the ability to enter the card details directly into ClinicOffice and to even perform recurring payments, then you would be better off using a Worldpay Online account or Paymentsense ECOM/MOTO. Should you wish you can always have any of these accounts running side by side with each other.

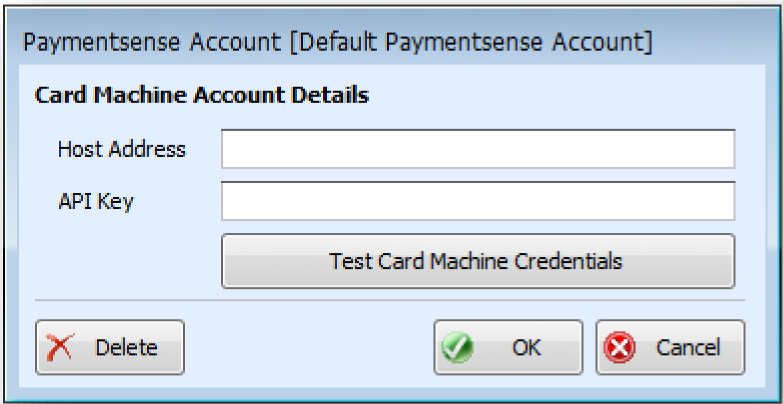
For information on setting up a Payment senses account please see the article "Setting up a Paymentsense Account". To setup a Worldpay Online account please see the article "Setting up a Worldpay Online Account".

Setting up a Paymentsense Connect Account

From the Select Payment Provider screen click the **Go to the Paymentsense setup screen** button. The window below will appear.



From the Paymentsense Setup screen, click the **Setup Guide** button. This will take you to our website which will provide you with instructions on how to begin the process of setting up an account. Once you have created your account you will be sent the physical card machine along with its **Host Address** and **API Key**. Once you have these details go back to the Paymentsense Setup screen and double-click on the blue link **[Dbl-Click to Edit]**. You can enter those details into the window below.



You may have noticed that you can have a different account for each clinic. So, you can have a different card machine for each clinic. All you need to do is enter in the Host Address and API Key for each clinic. If all clinics share the same account, you can simply enter your details into the "Default Paymentsense Account" line. You can test to make sure your details are correct by clicking on the button **Test Card Machine Credentials** (same window you would enter the API Key).

Journal Logging

A little lower down on the Paymentsense Setup window is the section **Journal Logging**. From this section you will be able to select if you do not want to log Paymentsense transactions in the patient's journal, only log successful Paymentsense transactions or log all Paymentsense transactions in the patient's journal. If you select to log the transactions, you can select the log type. What this will do is then create a log entry into the patient/contact's record whenever a card has been processed with that log type.

Card Type -> Payment Method Mapping & Transaction Currency

From this same window, you can also select what payment method each card type should be saved as on the payment or refund. By default, all cards will be saved as the payment method of "Credit/Debit Card". You can also set the **Transaction Currency**, which by default will match your computer's local regional settings, but you can always alter this should you need to you. When you are happy with these settings, click the **OK** button.

END OF DAY Reporting

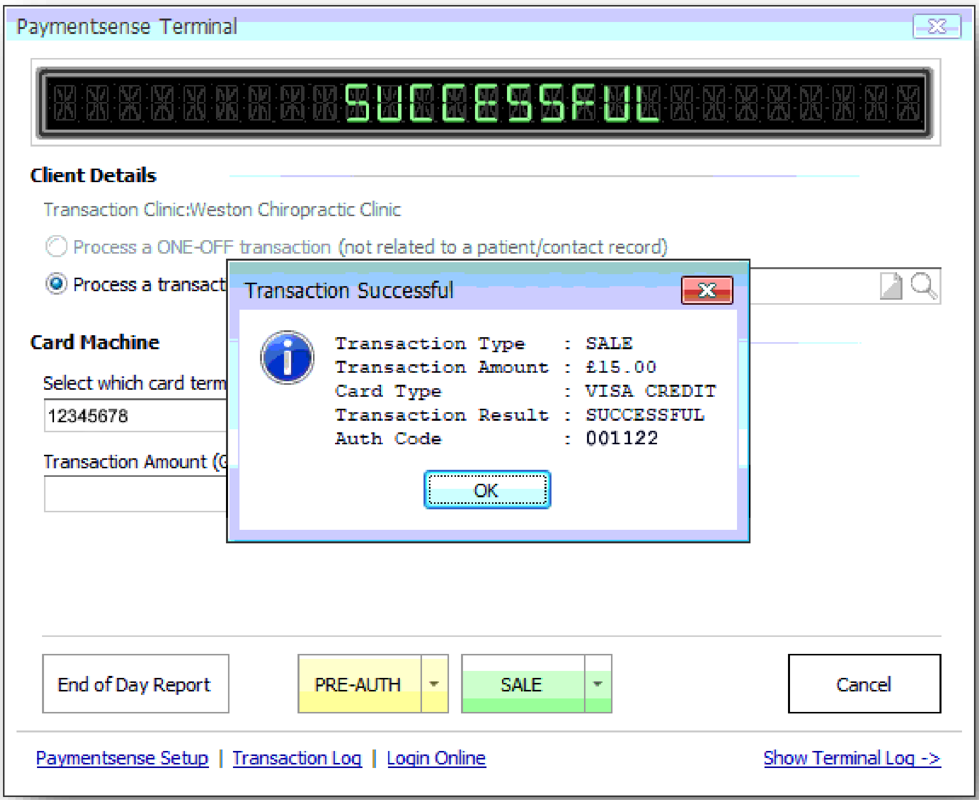
When using a card terminal machine, you must perform an end of day report or end of day banking. The reason this is essential is that any pending settlements will be triggered, and this means information stored on the machine will be sent from there to the acquirer (card issuer). It will also give you a figure for the day's taking as well, which is printed directly from the card machine.

From this section of the setup screen you can specify what is termed as the end of day. You can specify what is the end of day i.e. 17:30. You can set it so that it reminds anyone who logs out after this end of day time or to remind the last person who logs out after the end of day time. You can also specify to only show the reminder for certain users. Alternatively, if you prefer not to be reminded you can select the option "Don't remind me – I'll do it manually".

Processing a Card Using Paymentsense Connect

You can process a card using Paymentsense in multiple areas of ClinicOffice. For example, via the Quick Transaction screen, Payment editor or Refund screen. The below example will walk you through processing a card payment via a patient's appointment.

1) Right-click on an appointment and click **Quick Transaction**
2) Click the **Process Payment** button
3) Check to make sure the amount is okay and click the **Sale** button
4) This sends the amount through to your card terminal machine and from here the patient can use their either through contactless or chip and pin
5) Once payment has been made successfully the Paymentsense Terminal will report "**Successful**" (like the example below.



6) Click **OK** and the payment and invoice records will automatically be created

Issuing a refund is the same in the sense of opening a refund screen, clicking **Process Payment** button but instead you would click the **Refund** button. The person will need to be present for you to be able to issue the refund to the card they originally paid with.

Setting up a Paymentsense MOTO/ECOM Account

A MOTO or ECOM account is different to a Paymentsense Connect account in that a Connect account will connect to a card terminal machine but a MOTO or ECOM account do two different things which are stated below:

1) MOTO stands for mail order, telephone order and this will allow you to process cards directly through ClinicOffice without the need of a card machine. The card details are entered into but not stored in the software. This allows for the payment to be processed but card information is not retained. Instead a token of the transaction from Paymentsense is recorded in the software.
2) ECOM stands for E-Commerce and will allow for payments to be taken online. This can be used with the Online Diary addon so that patients can prepay for their appointments.

Technically the ECOM and MOTO are two separate accounts, so you can apply for the one without the other or you could apply for both and use them for the different purposes. Below we will look at the steps for setting up both.

MOTO Account Setup

1) Please visit the following https://pioneersoftware.co.uk/co-paymentsenseecom and fill in the online form to sign up for an account
2) Once you have been sent through your MMS and Merchant Account Details you can login to the Paymentsense MMS Gateway
3) From the gateway you will need to enable the option for 3rd party applications to process payments
4) From this same gateway, please also set a password for the 3rd party applications (this can take up to 15 minutes before it can be used)
5) Go to the **View** menu in ClinicOffice and click the **Program Settings** button
6) Go to the **Global Settings** tab and click the "**Setup Payment Provider**" blue link
7) Click the **Paymentsense ECOM/MOTO Setup** and for the "Default Account" double click on the link **Dbl-Click to Edit**
8) From here please enter your Merchant ID and your MOTO password and click Test MOTO to make sure that ClinicOffice can connect to your Paymentsense MOTO Account

Q. What are the MOTO CA Credentials for?

A. MOTO CA is a different Paymentsense account to your MOTO account. You will require this if you wish to perform repeat transactions based on the same card. You will need to contact Paymentsense to enable this additional account.

ECOM Account Setup

The first four steps are the same as the MOTO Account Setup. The latter steps are different for the most part.

1) Please visit the following https://pioneersoftware.co.uk/co-paymentsenseecom and fill in the online form to sign up for an account
2) Once you have been sent through your MMS and Merchant Account Details you can login to the Paymentsense MMS Gateway
3) From the gateway you will need to enable the option for 3rd party applications to process payments
4) From this same gateway, please also set a password for the 3rd party applications (this can take up to 15 minutes before it can be used)
5) Please now email "connect-e.support@paymentsense.com" along with your ECOM gateway username to request your unique ECOM JWT Key
6) Once you have this go to the **View** menu in ClinicOffice and click the **Program Settings** button
7) Click the **Paymentsense ECOM/MOTO Setup** and for the "Default Account" double click on the link **Dbl-Click to Edit**
8) Go to the ECOM Credentials tab and enter your ECOM Merchant ID, Password and your JWT Key (this is different from the API Key)
9) Click the Test ECOM button to make sure that your account works

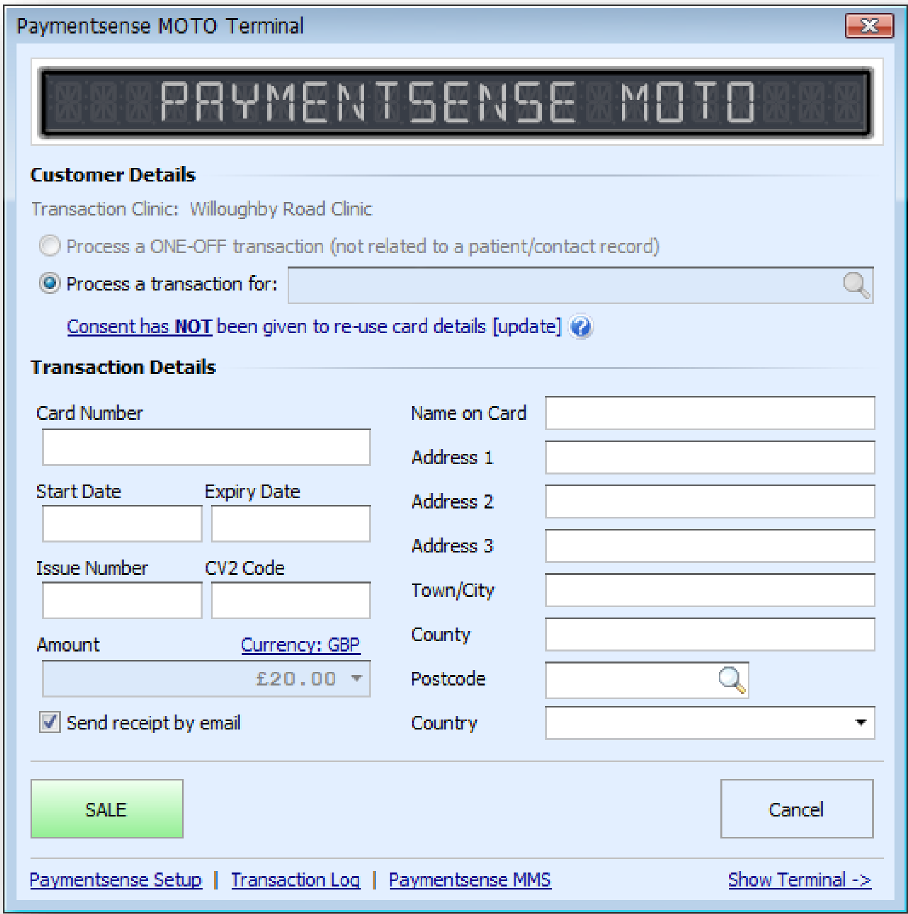
Once the ECOM account is setup you may need to give it a further 15 minutes for the JWT Key to register and then you should be able to enable this within the Online Diary's Admin Setting area. This will then allow for patients to pre-pay or pay a deposit towards their appointment before they come into the clinic.

Processing a Card Using Paymentsense MOTO

Like the other integrated payment methods in ClinicOffice, you can use the Paymentsense MOTO on any screen that you are recording money being taken or refunded. This includes the Quick Transaction screen, the Payment editor and Refund editor. The below example will look at using the MOTO Paymentsense account with the more commonly used Quick Transaction screen from an appointment.

1) Right-click on an appointment and click **Quick Transaction**
2) Click the **Process Payment** button

A window like the one below will appear. Fields such as "Process a transaction for", "Amount" and the address fields will be auto-filled in.



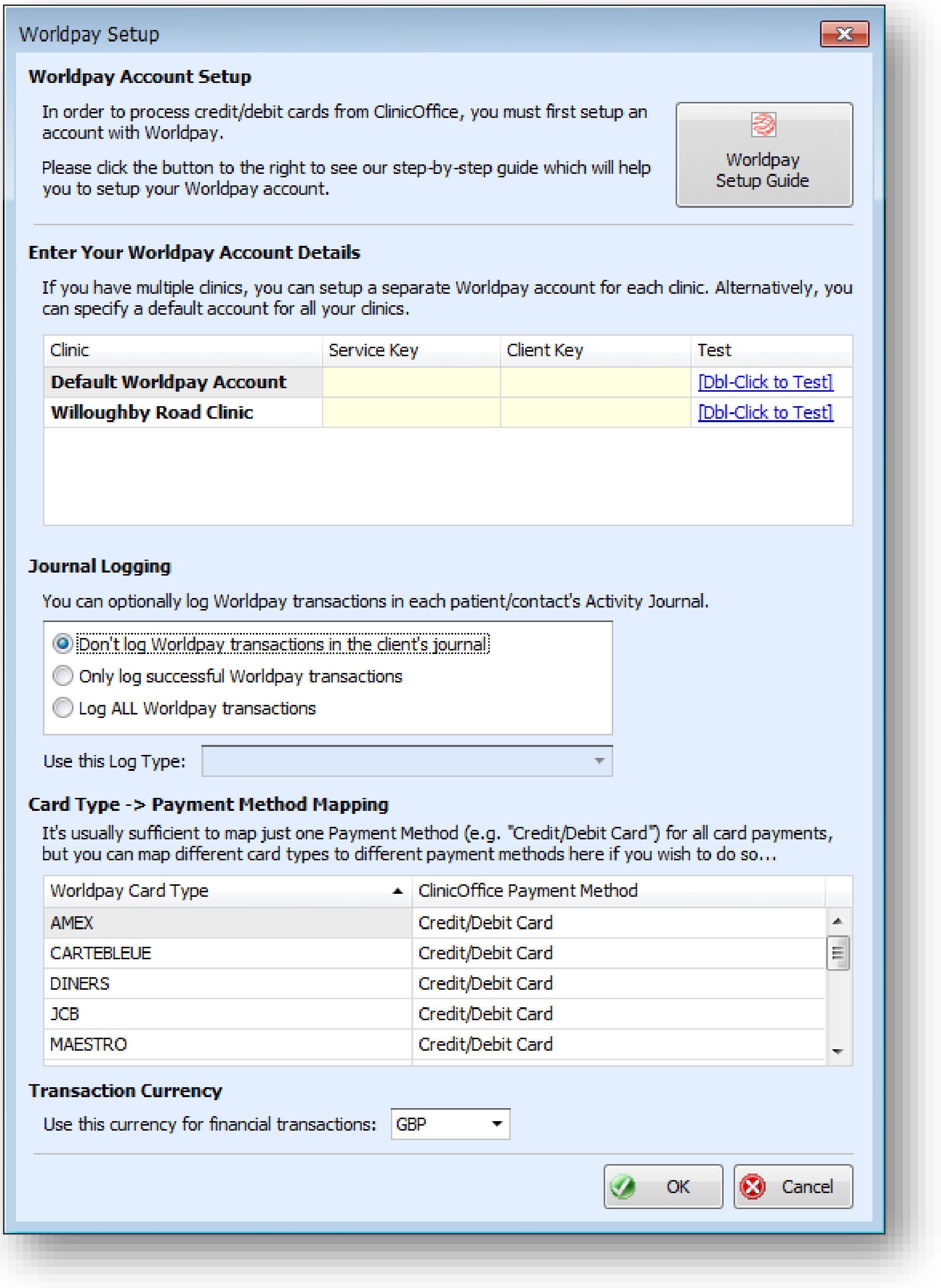
3) Enter in the card details for the customer and click the **Sale** button
4) If the card details are accepted, then a **Transaction Successful** message will appear, click **OK**
5) You will be asked if you want to email the customer a receipt of their payments, you can either select the pre-recorded email you have or enter a new one
6) Once done the Quick Transaction screen will close and an invoice and payment record will be saved against the customer's record

Issuing a refund is a similar process to the above except you will need to get into the Refund editor and from there click **Process Payment**. Once you get to this screen a similar looking terminal will appear and from there you can click the **Refund** button. For more information on how to issue refunds, please see the "Issuing a Refund" section.

Q. Card is being declined, what do I do?

A. There are two main reasons why a card is declined. The first is that the customer's bank has blocked the card. The second is that the customer does not have enough funds available in their account. For both situations, the customer should contact their bank. There are of course numerous other reasons why the payment might have failed. To find out what exactly this is, you can click the "Show Terminal" link and this will present a specific message with the reason the payment has failed.

Setting up a Worldpay Online Account



From the Worldpay Setup screen, click the **Worldpay Setup Guide** button. This will take you to our website which will provide you with step by step instructions on how to set up an account. Once you have created your account you can enter in your Service Key and Client Key into the Worldpay Setup window.

You may have noticed that you can have a different account for each clinic. So, you can enter in a separate Service Key and Client Key for each account. If all clinics share the same account, you can simply enter your details into the

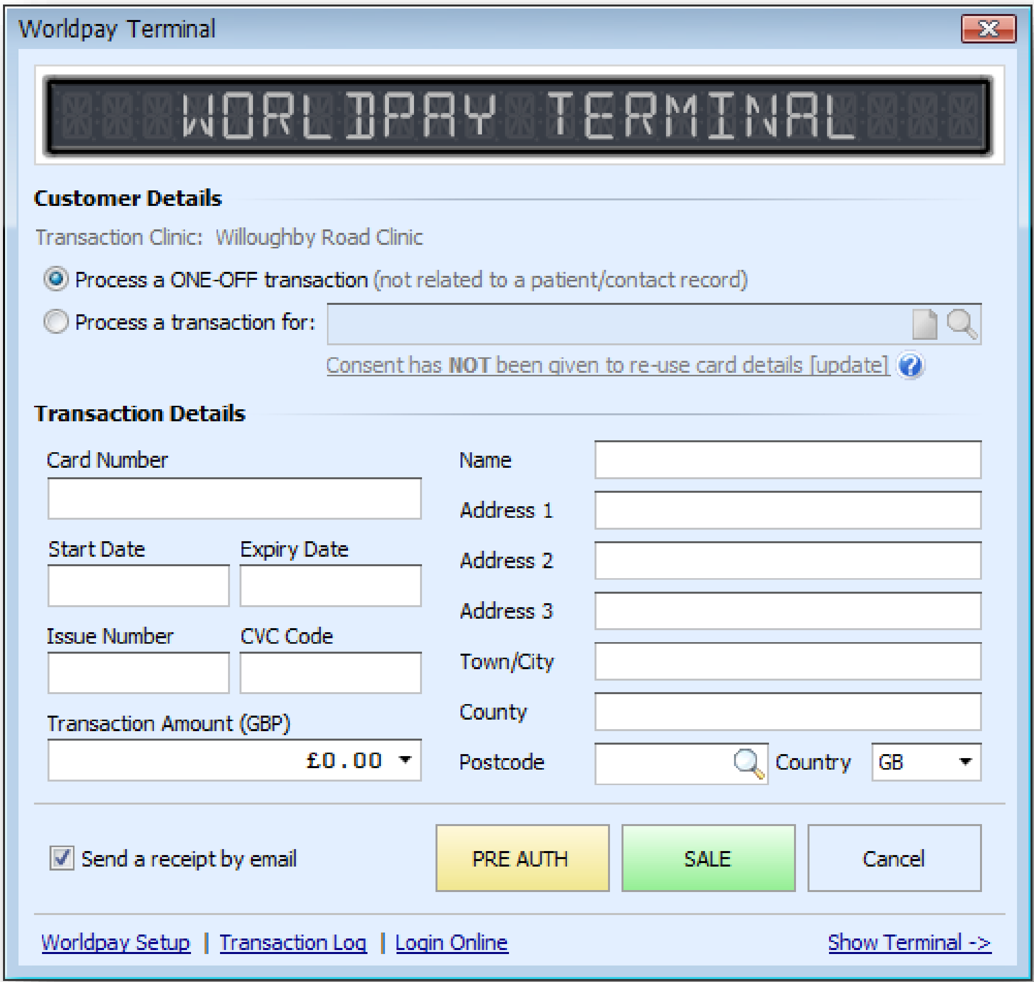
“Default Worldpay Account” line. You can test to make sure your details are correct by double-clicking on the blue link **[Dbl-Click to Test]**.

A little lower down on the Worldpay Setup window is the section **Journal Logging**. From this section you will be able to select if you don’t want to log Worldpay transactions in the patient’s journal, only log successful Worldpay transactions or log all Worldpay transactions in the patient’s journal. If you select to log the transactions, you can select the log type. What this will do is then create a log entry into the patient/contact’s record whenever a card has been processed with that log type.

From this same window, you can also select what payment method each card type should be saved as on the payment or refund. By default, all cards will be saved as the payment method of “Credit/Debit Card”. You can also set the **Transaction Currency**, which by default will match your computer’s local regional settings, but you can always alter this should you need to you. When you are happy with these settings, click the **OK** button.

Processing a Card Using Worldpay

Once you have your Worldpay account setup in ClinicOffice, you can start to process card payments via the Worldpay Terminal screen. You can access this screen from various windows. As mentioned, a littler earlier, you access the Worldpay Terminal via the Finances button, the Quick Transaction screen, or the Payment screen then you will be allowed to accept a sale or to pre-authorise a card. If you access the Worldpay Terminal via the refund screen, then you will only be allowed to refund the payment. For now, we will just look at accessing the Worldpay Terminal via the **Finances** button which is on the **Home** menu at the top of ClinicOffice. When you access it from there, the following window will appear.



From this window you can select to either process a “ONE-OFF transaction” or to link the transactions to either a patient or contact record. There is an option to “**Re-use the card details from a previous transaction**” which can be used when linking the transaction to a record. To use this, you will need first the persons consent to do this. If they do give you consent, then you can click the blue link “**Consent has NOT been Given**” and indicate how the person gave consent. Once the consent has been given and recorded, you can then use this same card for future transactions for this person.

Q. Does ClinicOffice store card details?

A. The card details are ***NOT*** *stored in ClinicOffice and are only handled by Worldpay's secure servers which are fully PCI DDS compliant. This means that you as the end user do not have access to the person's card information. In the situation of someone giving you the company permission to use their card for future occasions, ClinicOffice merely stores a token of the transaction and communicates directly with Worldpay to re-use the same card.*

The second half of the Worldpay Terminal window under the heading "Transaction Details" is where you enter the card details, along with the amount being paid. If you access this window via a quick transaction, payment, or refund, then the amount will automatically be filled in. On the other half of this window are the details of the person paying: such as their name and address. These details are again automatically filled in if you access this window via the quick transaction, payment or refund windows.

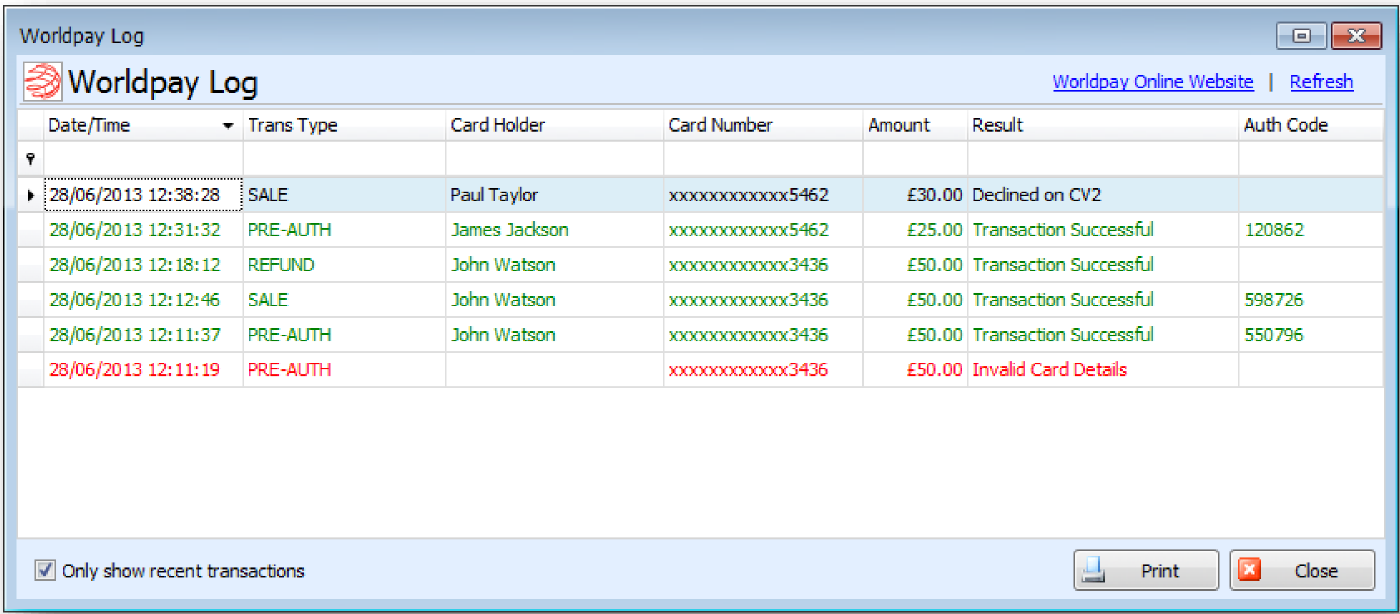
Once you have entered the card details along with the person's name you can then proceed to pre-authorise the card or process a sale with the card. With any of these options a message will pop up asking you to confirm the transaction details and it will ask you if you wish to proceed. If you click the **Yes** button a second message will appear confirming the transaction as being successful. If one or more of the details are incorrect, however, or the pre-authorisation has failed, then a message will appear in the Worldpay Terminal stating why it has failed, just like the image below.

Decline Worldpay Message

You can find out more information about why the card was declined by clicking on the small blue link in the bottom left hand corner named "Show Terminal". This will open a Terminal Screen just to the right of the main window which will provide you with a breakdown of what failed.

You will note that just next to the link "Terminal Screen" are three other links. The first is the "Worldpay Setup" which will take you to the window that stores your account details and Worldpay configuration detail. The second link is "Transaction Log" which will open a window, like the one below, that stores the results of past card transactions.

Worldpay Log Window



The last link "Worldpay MMS" will take you to the Worldpay Online Payments webpage.

Creating Online Payment Links

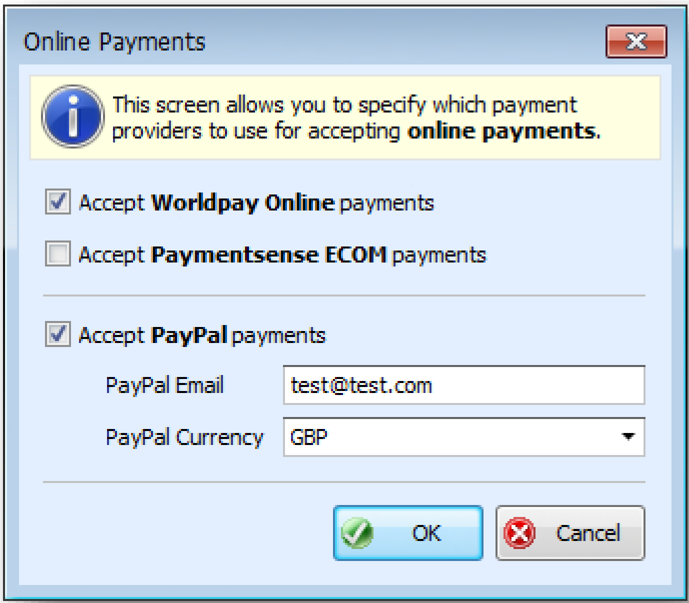
You might be in a situation with your business where it is advantageous to send out a link to allow your patient or client to make a payment online. One way this can be achieved is by embedding a live payment link into either your invoice template or into an email. Please note the requirements below needed before you can do this.

Requirements:-

1) ClinicOffice Server Edition + Support Plan or ClinicOffice Hosted Edition
2) A compatible payment provider with ClinicOffice

So long as you meet the criteria above then you can enable the payment link by following the steps below.

1) Go to the **View** menu and click on the **Program Settings** button
2) Go to the **Global Settings** tab and click the "**Setup Payment Provider**" link
3) Click on the "**Configure Online Payments**" link (bottom left of the window)
4) Tick the payment providers you wish to make available for online payments. You can only enable Worldpay Online or Paymentsense ECOM if you have your account details for the relevant payment provider entered in.



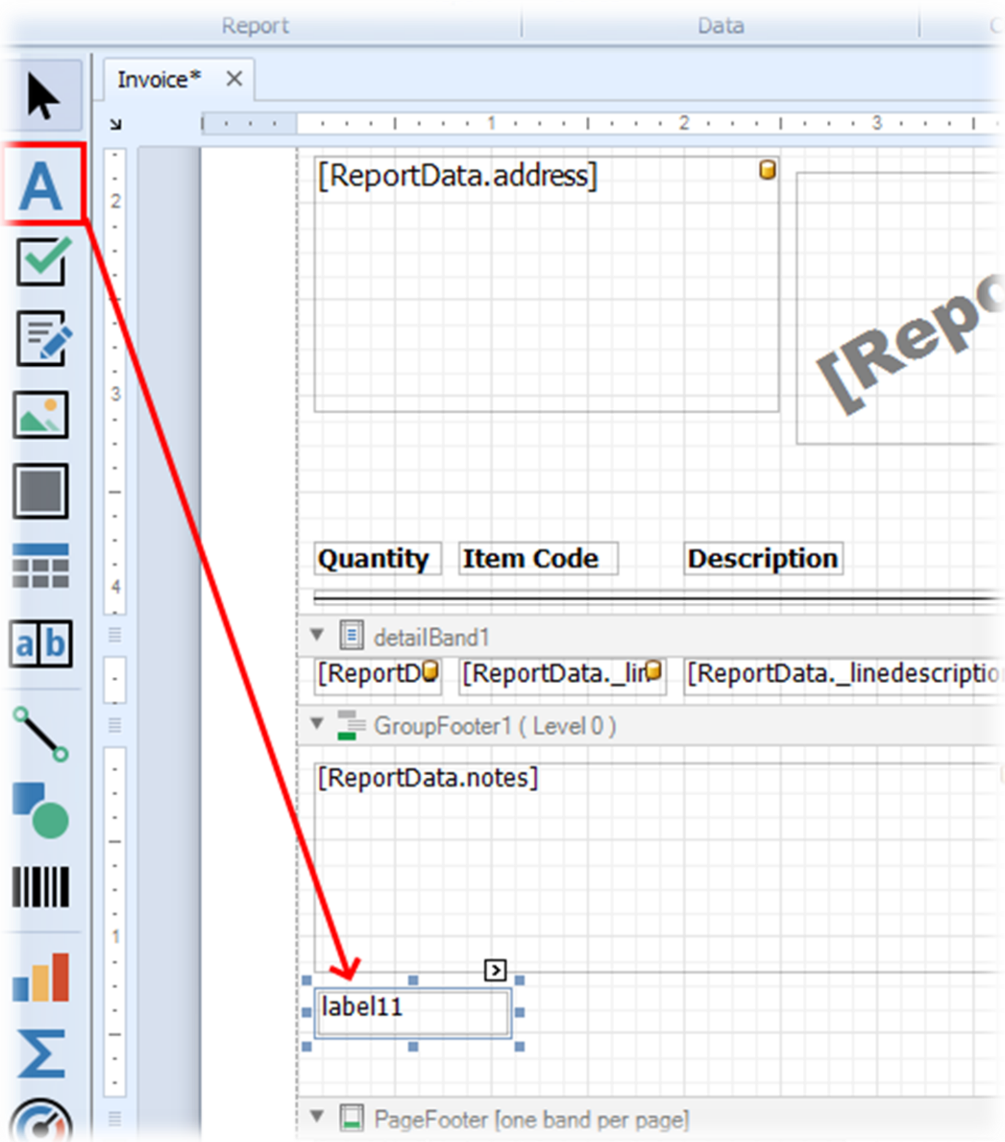
If you wish to use PayPal, please insert the email address your PayPal Business account is registered to and your preferred currency.

Once this is done our live payment links will now be able to function. To insert a payment link into an invoice template, please follow the steps below.

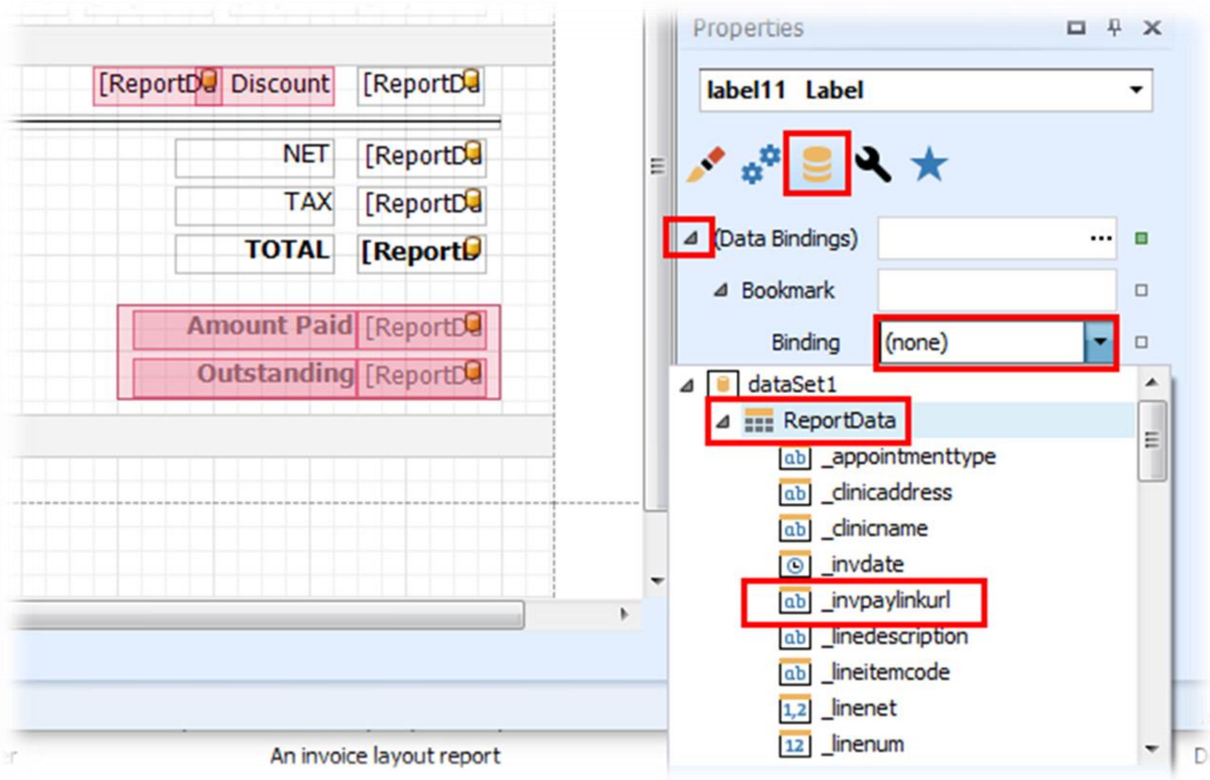
1) Go to the **Reports and Templates** section in ClinicOffice
2) Right-click on an Invoice based layout report like the report just called "Invoice" and select **Report Source**
3) Copy and paste in the text below and put it just above the text that says "from inv" then click **OK**

```
,cast('' as varchar(250)) as _invpaylinkurl
```

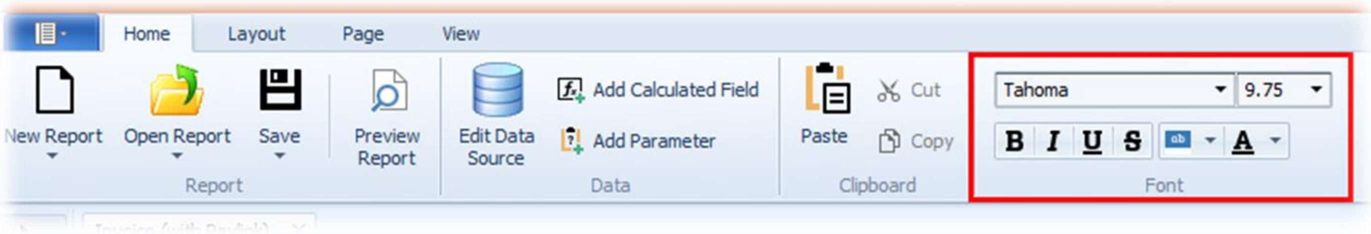
4) Right-click on the report and select **Design Template**
5) On the left-hand side is a label field (see image below), drag and drop this onto the invoice and resize accordingly



6) Double-click on this label and type in your text to indicate you want to receive a payment for example, "Click here to pay online"
7) While you still have this field selected, on the **Properties** panel to the right-hand side of the designer, click on the **Data** button
8) Expand open the (Data Bindings) and from there expand the (Navigation)
9) Click on the **Bindings** drop down and expand the "**ReportData**"
10) Select the text **_invpaylinkurl**



11) When you have the payment link label selected you can change the font size, font colour, boldness and whether it is underline via the "**Font**" controls within the editor. Usually for a web link you would set the font colour to a deep vibrant blue and underline the text. Making the font bold can also help it to stand out further.



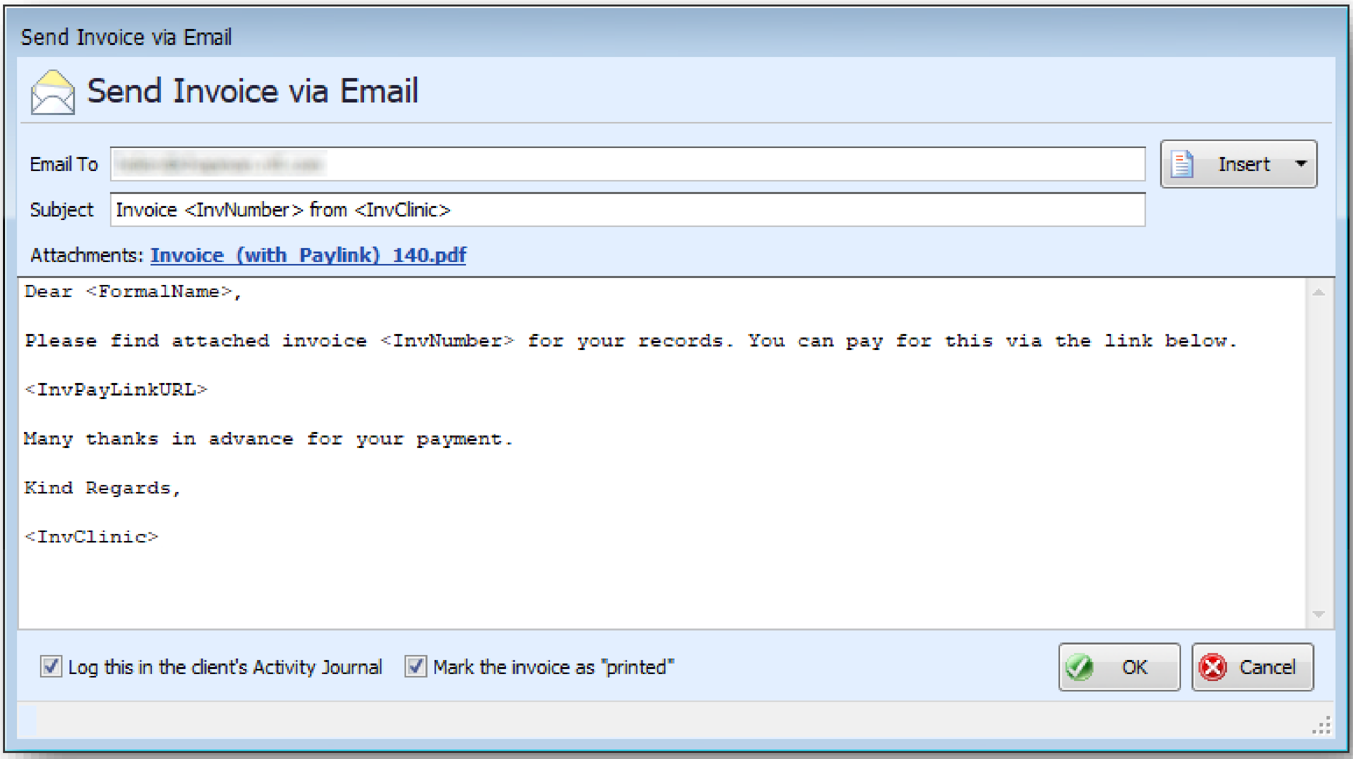
12) Click the **Save Design** button

This will now work as an active payment link for current invoice being displayed within the screen. This will also work when the report is emailed out as a PDF to the patient or client.

Sending Payment Links

1) Open an invoice or create a new invoice
2) Click on the **Send via Email** button
3) Select your invoice template
4) Edit the text that appears in the email template to suit your needs and provide room for the payment link
5) Click the **Insert** button and select **InvPayLinkURL**

This will insert the **<InvPayLinkURL>** text into the document that will act as a merge field. Like the example below.

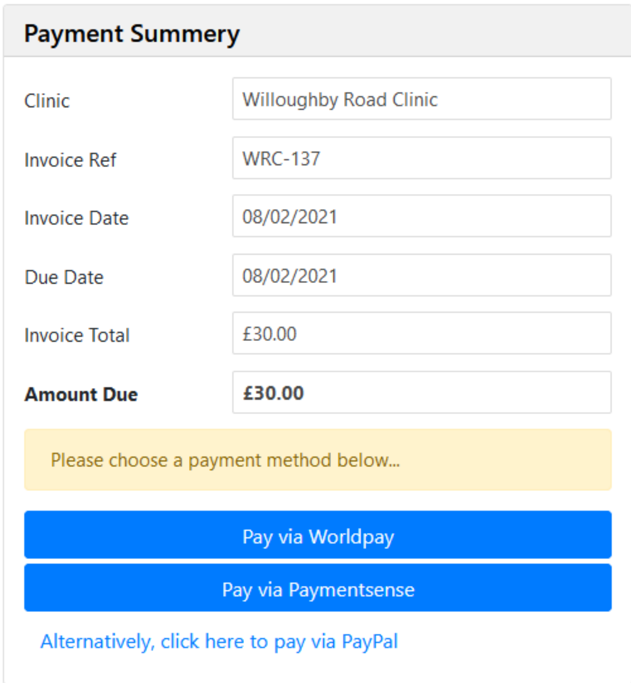


6) If you are happy with everything else, including the email address this is going to, click **OK** to send it out

What happens next?

When the patient visits the payment link either within the email sent or from the link within the PDF copy of the invoice, they will see the screen to the side appear in their web browser. What payment options appear will depend on what payment providers you are currently signed up with. The example here offers all 3 payment providers.

From this screen the client can click on the preferred payment provider if you have more than one and enter their card details. Once the payment has been made successfully, the client will receive a message on the screen thanking them for the payment and an email receipt is automatically sent out. In addition to this a new payment record will be created within ClinicOffice and allocated against the invoice. The invoice in turn will be marked as paid.



What if the patient tries to pay a second time for the same invoice?

As soon as the first successful payment is made, the system automatically notes that the invoice has been paid for. So, when the same payment link is visited a second time the web page will merely display a message saying, “There are no payments to be made on this invoice.” Hence, there is little possibility of a patient paying twice for the same invoice.

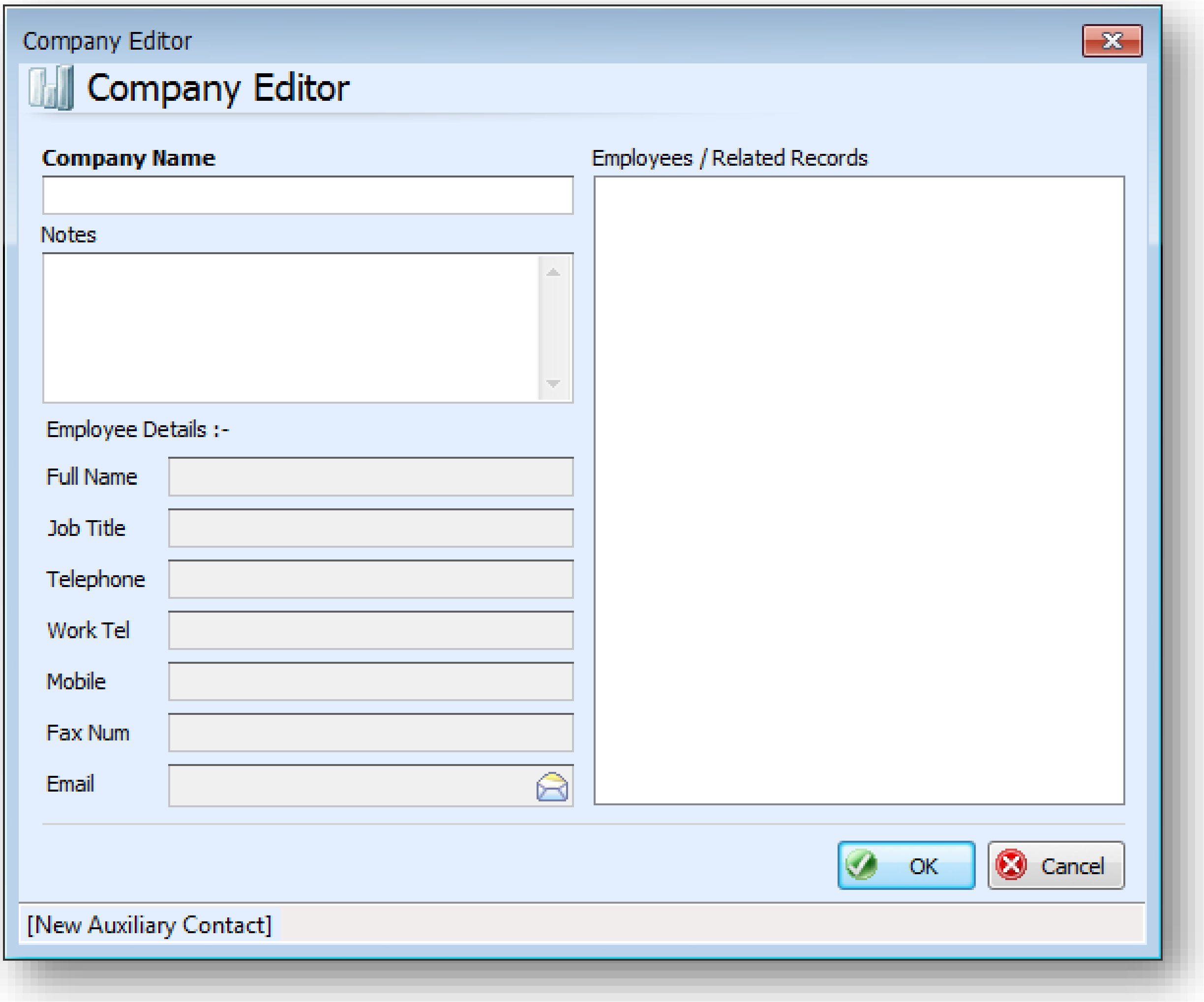
Companies

Although the Companies section is not linked to the finances in the conventional sense, it still has great relevance to it. A patient may work for a company that wishes to pay for their treatments. Hence you would assign this company to the patient's record. When you go to raise an invoice, it will offer to assign the invoice to the company. In this sense it works in the same manner as assigning an insurance company or an alternative recipient.

You can create a company record in two ways. The first is to open a patient record click on the **Search** button ( ) within the Company field under the address section of the patient's record. A search window will appear, and you can click the **New Company** button.

The second option is to go to the **View** tab, click the **Companies** button. This will take you to the company grid and it is from here you can click on the **New** button. Either way the following window will appear.

Company Editor



From this screen you will enter the name of the company and can also add any further information into the notes field. You can assign employees to the company by right clicking within the Employees/ Related Records field and selecting **Add Patient(s)/Contact(s)**. You can then perform a search on the relevant patient/contact record and add them on. You can also remove an employee in a similar fashion by right clicking on their name and selecting **Remove Patient(s)/Contact(s)**.

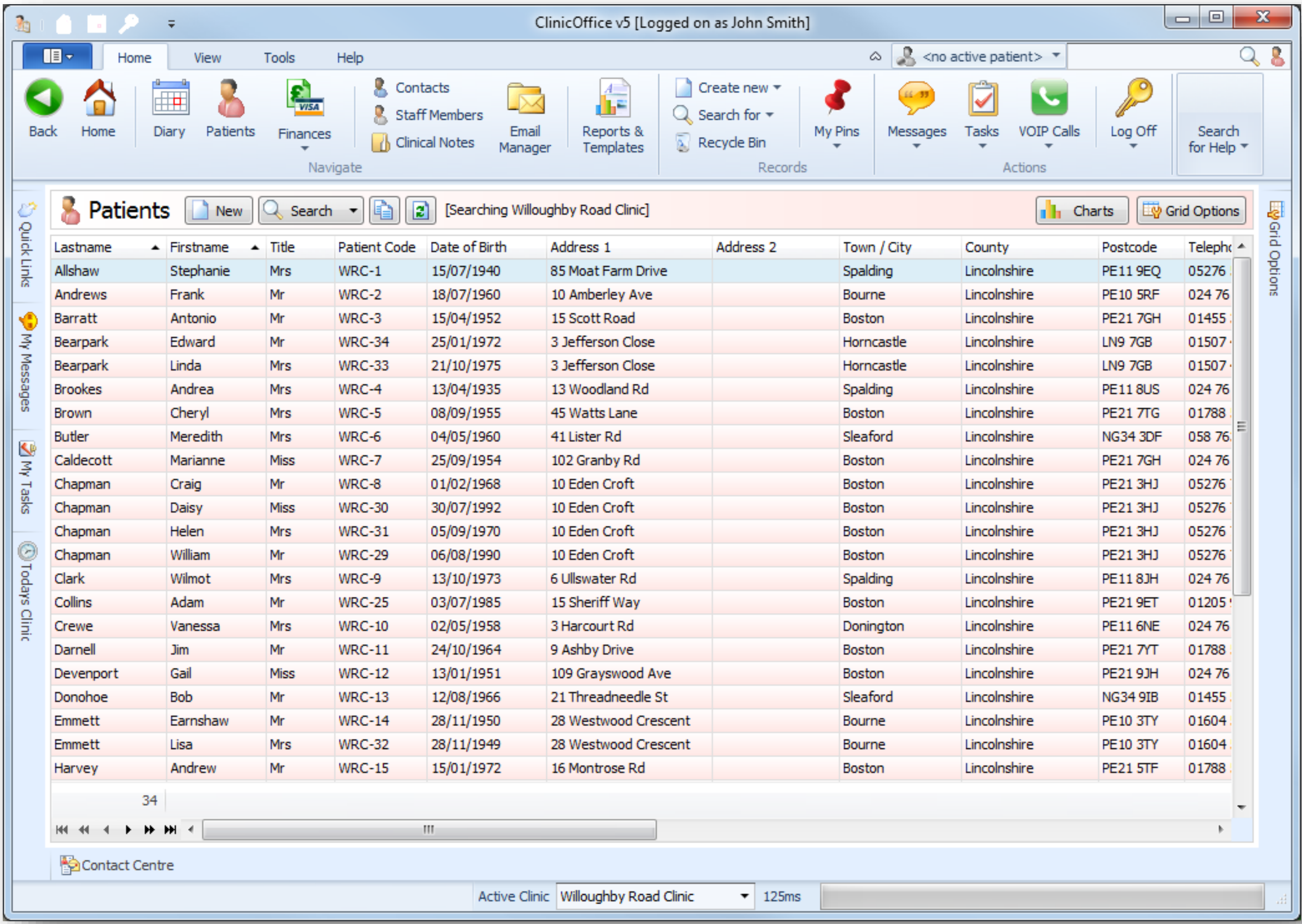
On the lower left half of the screen you will note the Employee Details. These fields will be filled by the company's primary contact. To assign a primary contact right-click on one of the employees under the Employees/ Related Records field and select **Set as Primary Contact**. Once you have done this the Employee Detail fields will be automatically filled in.

Once you clicked **OK** the company record will be saved. You can then add this company to a patient's record by opening the employee's record and assigning it to the company field. Alternatively, this can be done by opening the Company record and adding the employee there (discussed earlier on). From here the company can be billed in behalf of the patient.

Working with ClinicOffice Grids

ClinicOffice v5 uses data grids to display database records in rows and columns. These grids are very flexible and can be customised to suit your needs. Here's an example of the patient grid:-

Patient Database Grid



Navigating through a Database Grid

You can navigate through the database in a few different ways: -

- Use the vertical and horizontal scrollbars
- Use the mouse wheel to scroll up and down (if your mouse has one)
- Press the up, down, left, and right keys or the Page Up, Page Down, Home and End keys
- In-line search (see next subheading)

In-line Searching

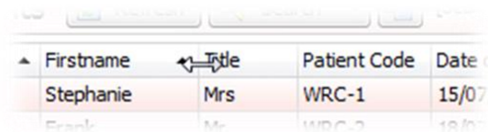
To use the in-line search facility, simply select the column you wish to search on (by clicking on it) and then type in what you want to find. ClinicOffice v5 will try to find the record as you type.

For example, if you are looking at the patient database grid and you click in the Lastname column, then type the letters "smi" (the case doesn't matter) ClinicOffice will locate the closest match it can find – probably someone with the name "Smith" in this case.

Column Resizing

If you wish to resize (i.e. widen or narrow) the grid columns, then move the mouse cursor over the boundary between two columns. You will notice that the mouse cursor will change as shown to the right.

Column Sizing



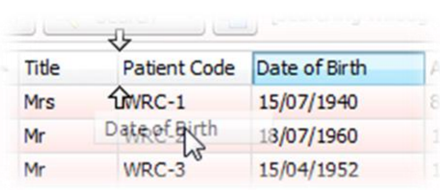
Click and hold the left mouse button and drag the column to the size you require. Alternatively, if you double-click at this point, then the column to the left will automatically be resized to fit the data.

If you right-click on a column header, you will also notice the **Best Fit** and **Best Fit (all columns)** commands which can also be used to automatically adjust the column widths.

Column Moving

If you wish to change the position of the columns in the grid, simply drag the column header to the new location. While dragging the header, you will see a black outline appear which indicates where the column will be moved to when you release the button.

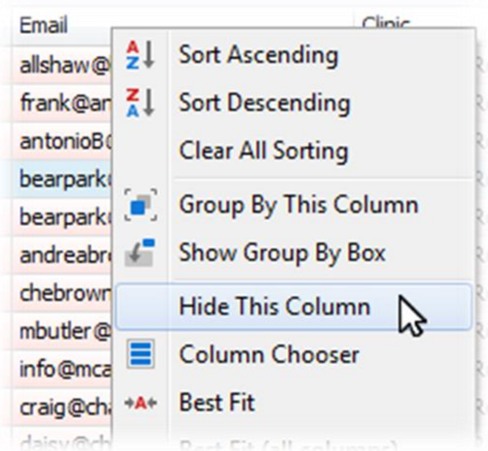
Moving a Column



Hiding Columns

If you wish to hide a column, you can do so by right-clicking on a column header and selecting **Hide this Column** (see example to the right). If you wish to have the column redisplayed, click on the **Grid Options** button, click the blue link "Show Column Customizer" and a Customization window will appear with the hidden fields in it. From here you can drag and drop the hidden field back onto the grid with the other columns.

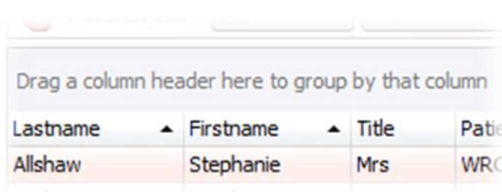
Hiding a Column via Right-Click Menu



Grouping Records

The grids allow you to group records together based on common field values. Firstly, you need to make sure that the Group by Box is visible. This is a grey area which appears above the grid and says, "*Drag a column header here to group by that column*", as shown to the right.

The "Group by Box"



To toggle the Group by Box, right-click on any column header and click **Show Group by Box**.

Now you can simply drag and drop a column header into the Group by Box and ClinicOffice will automatically group all records together, based on the column that you chose.

You can group by multiple columns, simply by dragging and dropping more column headers into the Group by Box. To remove the grouping, simply drag the column header out of the Group by Box and drop it back among the other column headers in the position of your choice.

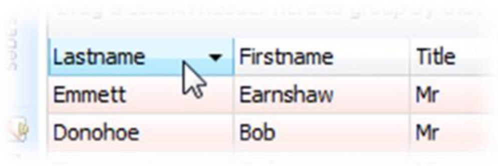
The best thing is to simply experiment for yourself and see how this feature can be of use.

Q. What if I make a real mess of the grid and don't know what to do?!

A. You can always reload the default grid layout by clicking on the GRID OPTIONS button (in the top right-hand corner) and then selecting <Default> which is under Layouts.

Sorting the Grid

Column Sorting



Any column in the grid can be sorted alphabetically (or numerically) in ascending or descending order. To sort a column in ascending order, simply click the column header as shown in the example to the right.

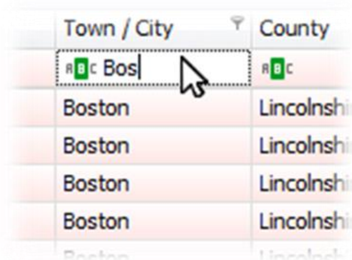
As you can see, a blue triangle pointing downwards appears to indicate that this column is now sorted into a descending order (i.e. "Z..A" or "9..1"). To sort the column in ascending order, simply click the column header again and the blue triangle will point upwards indicating an ascending order.

The same can be achieved by right-clicking on the column header and selecting Sort Ascending or Sort Descending from the menu.

You can sort on multiple columns by selecting the first sort column (as described above) and then holding the SHIFT key (on the keyboard) whilst clicking on another column header. This will add a secondary sort on the second column you have chosen. You can then add a third sort as well by clicking on a third column while still holding the SHIFT key. You may sort by as many column headers as you like by using this method.

Filtering Records

Example of Filtering



The filter facility allows you to filter the information shown in the grid. Bear in mind that the filter only applies to whatever data is currently being shown, so you may want to click on the arrow on the **Search** button and select **Show All Records** before using this feature. Filters can work in conjunction with searches or can be used as in a more permanent way when you save the grid layout (please see the section "Saving a Grid Layout" for more information).

To put a filter on a column, you must first make sure that grid filtering is enabled. You can do this by clicking on the **Grid Options** button and click on the blue link "**Toggle Grid Filtering**". Once column filtering is enabled, you'll notice that each column has an empty field just underneath the column header. Start typing in the empty field and the grid will be filtered in 'real time'. As you type in the first letter it will select only the records with that fist letter and so on. To the right is an example where the "Town/City" filter button has been clicked and 'Co' has been entered.

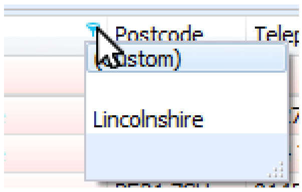
You will note that to the left of the filter is an ABC label, which stands for "Contains". This means what you type will filter on values that 'contain' the text or numerical value you have inserted. If you click on this label you will be presented with an assortment of options. By selecting a different option, it will affect how the filtering works on the grid. Each option and what they do is listed below.

Option	Purpose
Clear Filter	Clears any text or value inserted in this field's filtering.
= Equals	Will filter on values that are an exact match to what has been inserted into the filter.
≠ Does not equal	Will filter out values that are an exact match to what has been inserted into the filter.
ABC Contains	Filters on values that contain what has been inserted into the filter. It doesn't matter if the value is present at the beginning, somewhere in the middle or at the end.
ACB Does not contain	Filters out values that contain what has been inserted into the filter. It doesn't matter if the value is present at the beginning, somewhere in the middle or at the end.
A%C Is like	Will filter on values that are a match to what has been inserted into the filter but unlike the "Equals" operation, this is not case sensitive.
A%C Is not like	Will filter out values that are a match to what has been inserted into the filter but unlike the "Does not equal" operation, this is not case sensitive.
ABC Begins with	Filters on values that only begins with the value inserted into the filter.
ABC Ends with	Filters on values that only ends with the value inserted into the filter.
> Is greater than	This will only work with numerical values. It filters on values that are higher than the one specified.

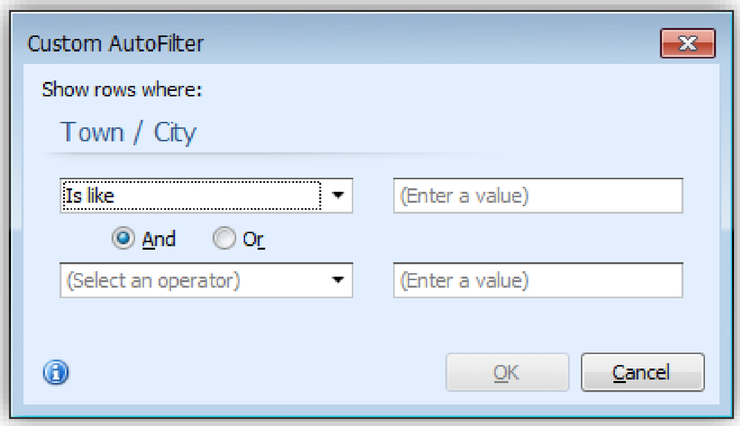
≥ Is greater than or equal to	This will only work with numerical values. It filters on values that are higher or equal to the one specified.
< Is less than	This will only work with numerical values. It filters on values that are lower than the one specified.
≤ Is less than or equal to	This will only work with numerical values. It filters on values that are lower or equal to the one specified.

How to Use More Than One Filter on a Single Field/Column

Enabling More than One Filter



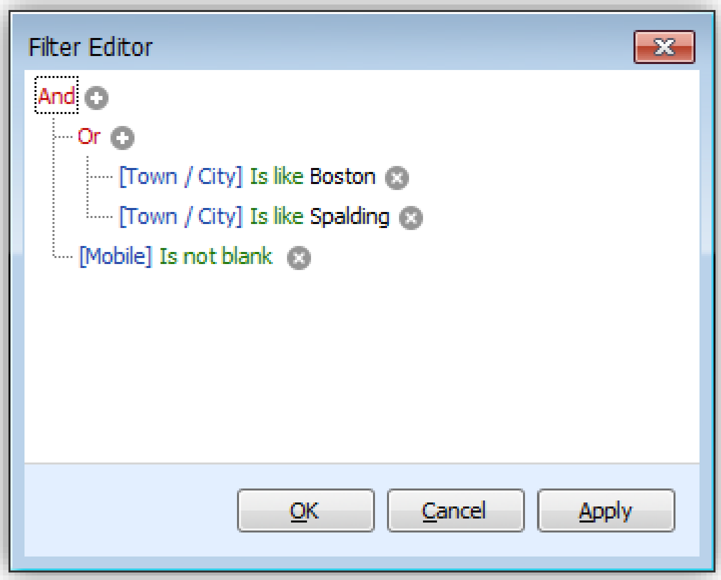
By typing into the filter area just below a column header, you will only be able to filter on a single value at a time for a field. One way to place additional filters is by hovering your mouse over a column header, clicking on the small arrow that will appear (see the example, to the right) and from there click “**Custom**”. The Custom AutoFilter window below will now appear.



This screen will allow for you to specify two conditional filters for this field. On the fields to the left is the filter type options. These are like the ones mentioned in the grid above, with the addition of “**Is Null**” and “**Is Not Null**” which will factor in or out blank values on a row. On the right is where you would insert the criteria.

You will note the options “**AND**” and “**OR**”. These are known as Boolean Operators that will change how your filter works with the combined criteria. If you select “**AND**” it will tell the grid to show only rows for this field that match the criteria specified in the first and second filter. If you select “OR”, then you are telling the grid to filter on rows that match either the first or second filter. Once you have set your criteria, click OK for it to take effect.

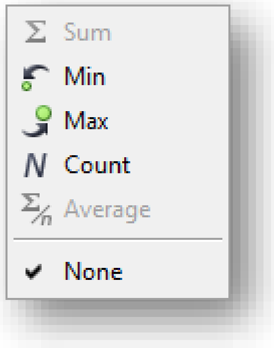
If you need to specify more than two filters for a field then there is another way, you can right-click on a column header (i.e. Town/City) and select **Filter Editor**. If you do not have this option, please make sure that the Toggle Grid filtering is enabled first. The filter editor is a little more complex to use than the methods mentioned above, but it will offer the greatest flexibility and control. The filter editor will not only show a filter on a single field/column, but it will show all filters present on the current grid. The Filter Editor will also support a wider range of operators and will allow you to specify more than one. In the example to the right, the criteria are that the Town/City field match either Spalding or Boston and they must have a number in the Mobile field.



Clicking on an operator such as the “**AND**” or the “**OR**” will allow you to either change the operator, add a new condition to the current operator or add a new group, which will add a new operator. You also have the option to remove an operator from the same menu. You can remove a current filter condition by clicking on the small close symbol. Once you are finished, click the **OK** button or the **Apply** button to preview what changes the filters make to the current grid display.

Column and Group Summaries

Footer Summary menu



At the bottom of the grid is the grid footer where summary values are displayed. There are also group footers which are visible when you are grouping by columns.

Summaries allow mathematical calculations to be displayed within the grid footer or a group summary footer. Simply right-click on the footer immediately beneath the column you want to summarise, and you will see a menu like the one to the right.

These functions are self-explanatory. The **Count** function is available for any column, but the other functions will only be available when numerical data is present within a column.

To remove a summary from a footer, simply right-click on it again and click **None**.

Saving a Grid Layout

You might find that you have formatted the grid in a way that you feel it will be useful to have it for future use. Maybe you want to use it for printing or use it to export information. This is where the saving the grid layout comes in hand. The steps below will talk you through how to save a grid layout for future use and this applies to both standard grids (i.e. Finances grid) and grid reports.

1. Assuming you are already looking at the grid, click the **Grid Options** button
2. At the very bottom of the panel, under the Layouts, click the **Save Layout** button
3. Enter in a name and click **OK**

When you now visit this grid, you can select the layout from the Grid Options. Layouts are specific to each grid but will be visible to other users who also have access to that grid or report.

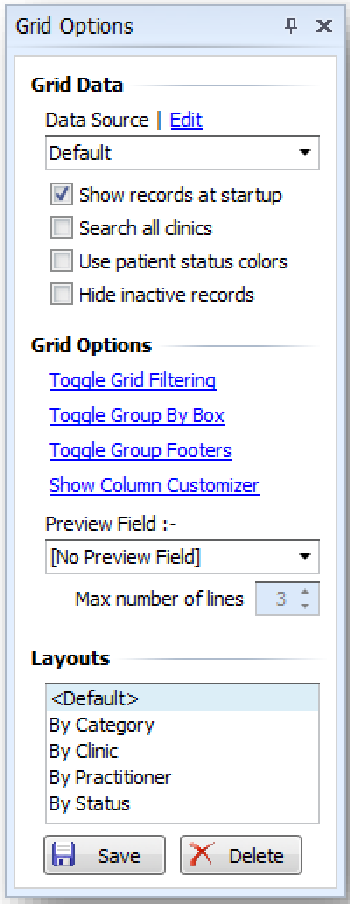
Q. What is being saved when I am saving a grid layout?

A. The following are saved within the grid layout: any filters, column positions; hidden fields, grid grouping of records; grid sort order and preview fields. Anything that you search on is not saved. Searches are fluid and are not intended to be saved.

Grid Options

At the top right of the grid is the **GRID OPTIONS** button, clicking on this label will bring up the grid options panel on the right-hand side of the screen.

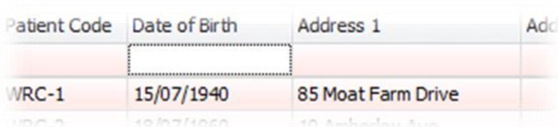
It is from here that you will have greater control over how your grid appears and operates. The functionality of the grid is listed out in the table below.



<table>
<tr><td>Data Source</td><td>Some grids e.g. the patient grid (above) have more than one source, If you would like to view more of the data stored you can select either Additional Lookups or Next/Prev Appointments. Each grid has its own sources and you can add your own if you know SQL.</td></tr>
<tr><td>Toggle Grid Filtering</td><td>

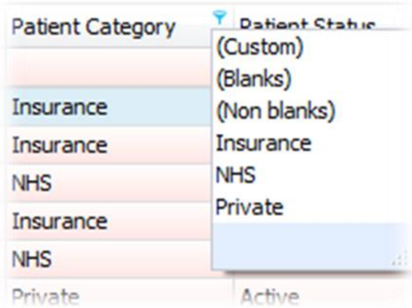
Clicking on this option either adds or removes the filtering fields from the grid and the filter menu.

Filter Field



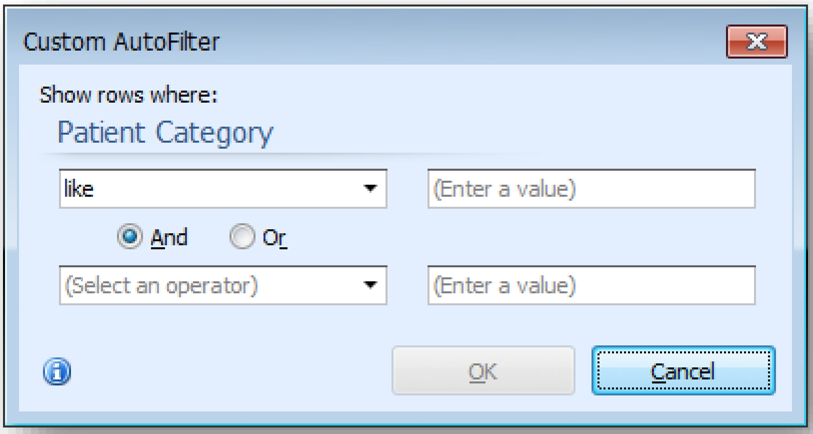
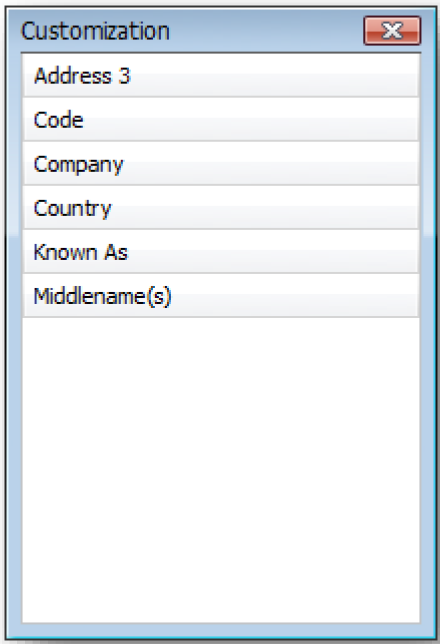
If you type into the filter field it will find all records that match it. For example, type in “15/03/1987” in the filter field under D.O.B; this will find all dates of births that are born on 15th March 1987.

Filter Menu



If you hold your mouse over the top right-hand corner of the column header then a small arrow will appear. Click on this and it brings down a small menu. The options will vary depending on the column you have chosen and how many records contain this information. At the top of the menu there will always be the three choices: **Custom**, **Blanks** and **Non-blanks**. Just below this you have a list of values that are present within the grid. If you select **(Blanks)** for Patient Category, then all the records which have no Patient Category will be displayed and if you select **Non-blanks** the opposite happens. If you choose the **(Custom)** filter option, the window to the right will appear.

</td></tr>
</table>

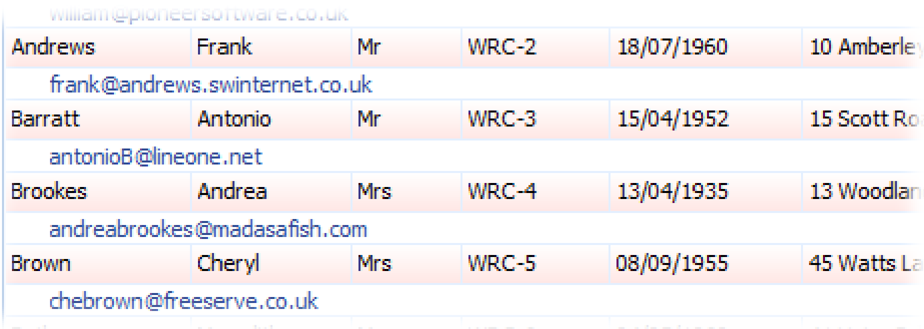
	Custom Filter Window  This custom filter enables you to choose from a selection of rules and enables you to run two rules simultaneously. It will also detect which set of values is required and give you the necessary options.
Show records at startup	When ticked this will automatically display all records within a given Clinic or Database, when you go to view the grid for the first time in this session.
Search all clinics	By default, this is not ticked and so when you perform a search on the grid you will only see data for your currently selected clinic. When ticked, data from all clinics will be displayed when you perform a search.
Use patient status colours	You can assign colours to the patient's status under the Types and Categories. When this option is ticked the colours for the patient's status will be displayed.
Hide inactive records	Any patient's which have their status set to inactive will be hidden from the grid.
Toggle Group By Box	Clicking on this option either adds or removes the grid grouping box at the top of the columns.
Toggle Group Footers	This inserts/removes the footer which is present at the base of each group (this is if the grid has been grouped). The footer is most helpful if you need to count the number of records present or add up a monetary value for a group.
Show Column Customizer	Clicking here brings up the column Customization window. This works by left-clicking on the field you would like on the grid and dragging and dropping it there. A very useful feature of this is the ability to drag and drop existing columns into the column Customization window and remove them from the grid. Column Chooser 

<table>
<tr><td>Preview Field</td><td>

When a preview field is selected from the drop-down menu an additional row will appear below a given record that has data for your chosen field. So, for example if you are in the Patient Grid and you select Email, in the Preview Field on the Grid Options all patients

Who have an email address will display an additional column below. This will display their email.

Patient Grid with Email Preview



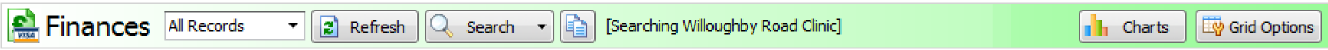
You can preview any field that your grid currently contains. If you change the data source of the grid, then the Preview Fields will also change. You will also note that there is the option **Max number of lines**. This will allow you to choose how many lines you wish to be previewed under the record. This is helpful if you are previewing a memo field such as appointment notes, you can limit the number or increase the maximum number of lines that can appear.

</td></tr>
<tr><td>Show all records at startup</td><td>When ticked this will display all records within a given Clinic or Database, when you go to view the grid for the first time in this session.</td></tr>
<tr><td>Layouts</td><td>This is where you can save any grid layout you may need. You will then be able to return to it for future occasions. To do this, setup the grid the way you want it and then at the bottom of the Grid options click SAVE. Enter a name for the layout and click OK. Your new layout will now appear in the list for you to select. You can click the DELETE label to remove the current layout if you need to.</td></tr>
</table>

Charting

ClinicOffice v5 can produce charts based on the information within a grid; this means that they reflect the current data on display. As a quick example please take a look at the Finances screen; click the arrow on the **Search** button and select **Show All Records** then click the **Charts** button which can be found in the title bar above the main grid.

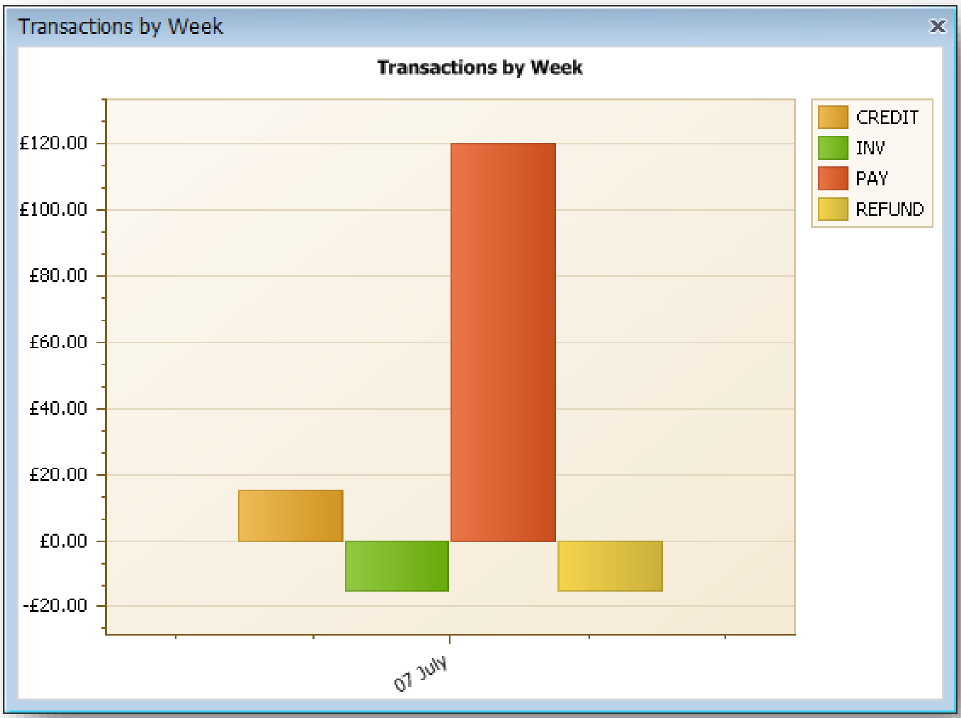
Finance Bar (top of the Finance Grid)



This will open a drop-down menu that allows you to either open an existing chart using the data available in the grid or to create a new one.

On the finances grid there is a chart called "**Transactions by Week**". If we click on this the following screen will appear.

Transactions by Month Chart



This shows the total value of all Invoices, Payments and Credit within the month of December. To enable the different features of the charting module right-click on the graph; this menu now appears:-

Charting Rick-Click Menu

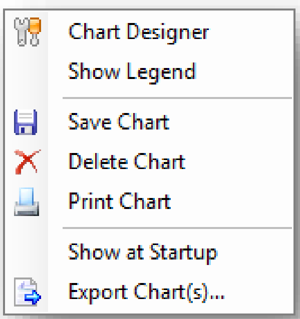
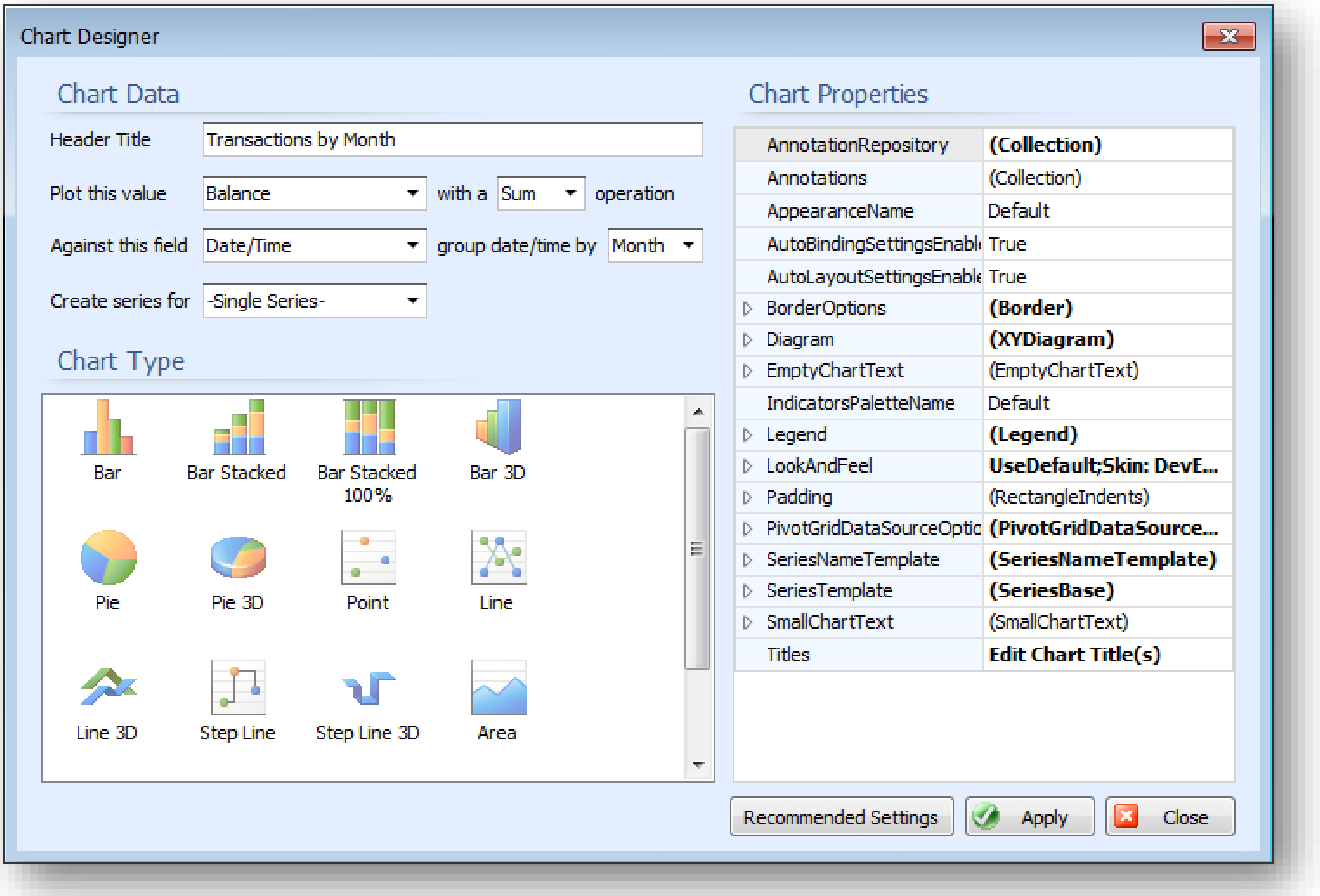


Chart Designer	Opens the full designer window so that you can change any of the variables of the chart.
Show Legend	Toggles the description of what the colours on the graph relate to.
Save Chart	Saves the chart so that it appears on the dropdown menu when you click on the **CHARTS** button.
Delete Chart	Deletes this chart from the dropdown menu.
Print Chart	This will print preview the chart. From there you can print it off.
Show at Startup	Opens the chart in its current position and with the current settings, next time you load the finance screen.
Export Chart	Allows you to export the chart (Please see Exporting Data for more information).

Chart Designer

Transactions by Month – Chart Designer



<u>Chart Data</u>

Header Title	This is the title you would like for your chart. This appears at the top of the chart.
Plot this value	This is the field where the first set of values will be plotted along the Y-axis.
With an operation	If the “Plot this Value” is for a numerical field, then you will need to select an additional operation. By default, this will be a **Sum** operation. So, you would sum up the total numerical value. You can alternatively select **Avg**; **Min** and **Max** operation instead of the Sum if this suited your purposes better.
Against this field	This is where the second set of values will be plotted along the X axis.
Group date/time by	If the “Against this field” is a date value, you will have the additional option to group the date either by day, week, month or year.
Create Series for	Allows you to plot a chart in series with another field. In effect this is the third value and so acts like the Z axis.

<u>Chart Type and Properties</u>

You have a “Chart Type” section where you can select the chart type you wish to display your data with. You may wish to play around with the different types and decide which is best. You can click the **Recommended** Settings button and then **Apply** to see how this looks.

On the right-hand side there is the **Chart Properties**, which will allow you to delve further into the chart settings such as label positions or the format of the labels. Generally, this is designed for more advance users, although you are more than welcome to have a play around with this regardless of user experience.

If you are happy with the chart you have designed and wish to save it, close down the designer window, right on the chart and select **Save Chart.** The chart will now be accessible via the **Charts** button on the grid you created it from.

Searching the Database

ClinicOffice employs a simple but powerful search facility. There are two search modes you can use, namely a Quick Search and Full Search mode.

Patients Bar (Top of Patient Grid)

Quick Search

Quick Search on the Patient Database

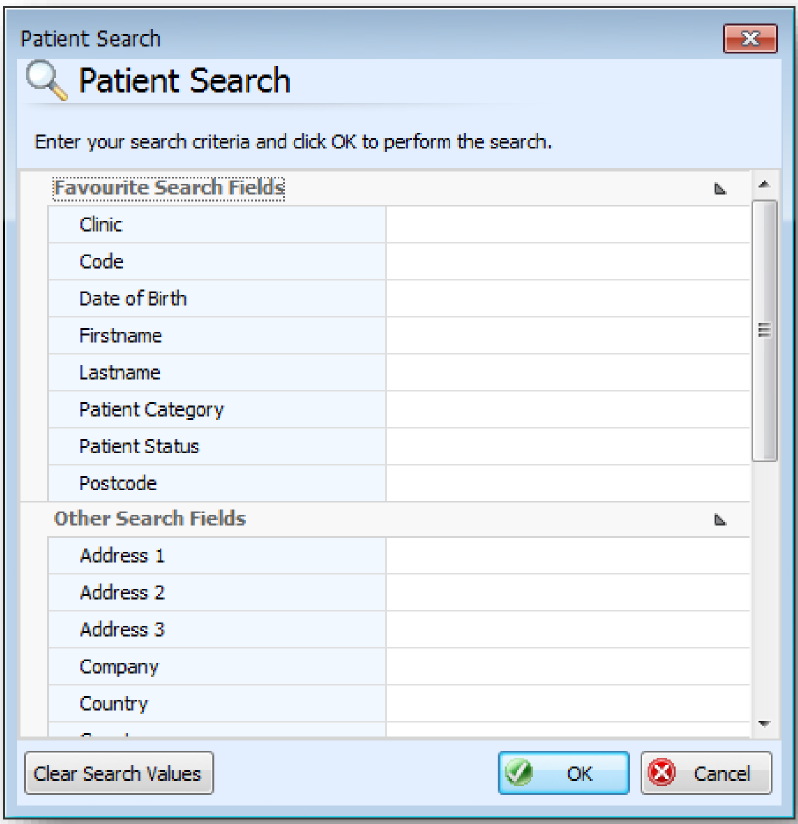
The quick search facility is available from all screens as it is now located on the quick access toolbar at the top of the window.

The quick search lends itself to searching quickly for a record. The way it works is that ClinicOffice will search the most commonly used fields for the screen you're currently looking at.

For example, on the patient database (as shown above), the quick search will usually search the most commonly used fields for example when searching the patient database (as above) it will look in the *Lastname, Firstname, Patient Code, DOB and post code* fields. Simply type what you're looking for into the search box and then click on the magnifying glass (or press **Enter**).

The quick search also changes according to the area you are looking at; for example, if you are looking at the contacts grid then it will change to search on contacts. Alternatively, you can choose the area to search, by left clicking on the icon to the far right and selecting from the drop down menu.

Full Search on the Patient Database



Full Search

The full search enables you to be more specific about what you're looking for. You can enter search values against specific fields. Click the **Search** button (located at the top of each grid) to open the full search.

Notice that you can mark some fields as your Favourite Search Fields (☆) while the rest will remain in your Other Search Fields (★). For example, in the Patient Search if you wished to add the field **Company** to your favourites, just right-click on it and then click **Add To Favourites**. You may move this back to the Other Search Fields by again right-clicking on the field then click **Remove From Favourites.**

The only significance of assigning favourites is so that you can adapt the user-interface more specifically to the way you work.

After entering the values that you wish to search for, click the **OK** button to start the search. Bear in mind that you can enter partial searches on text fields and the searches are not case sensitive (for example "sm" on "Lastname" will find anyone called "Smith" or "Smart" or Smithe").

The **CLEAR SEARCH VALUES** button will clear the search so that you can start again and clicking **OK** without inputting any data will show all the records.

Exporting Grid Data

Another feature of the ClinicOffice grids is the powerful export functions. To export a grid, please follow the steps below.

1. Either click the **Show All** () button or perform a search on the grid (see previous article)
2. Right-click anywhere on the grid
3. Select **Export Grid**
4. Then select the format you wish to export it to i.e. **Export to Excel**
5. Navigate to the folder you wish to save your file to
6. Enter a file name and click the **Save** button

Bear in mind that ClinicOffice v5 will export the grid data exactly as it is currently shown on screen. This means that only the records currently displayed will be exported, including the sort order, filters and grouping. This is the case on almost all grids and grid-based reports. The only things that are not exported are fields being previewed under the main lines or secondary grid source information on grid-based reports.

Batch Updating Information

There might be times when you need to update a value on multiple records and ideally, you would only need to do it once, this is where the Batch Update feature comes into play. The Batch Update feature is available on the following grids: -

- Appointments (accessible via the Diary)
- Patients
- Contacts
- Invoices
- Items and Services

The fields that you will be able to perform the batch update on will vary depending on the grid you are looking at. For example, the patient's grid will let you update fields such as the patient status or postcode, whereas the invoice grid will allow you to update the invoice due date. Regardless of the field, the process is similar. The example below will provide a generalised way of performing the batch update, but it will vary slightly from the field to field.

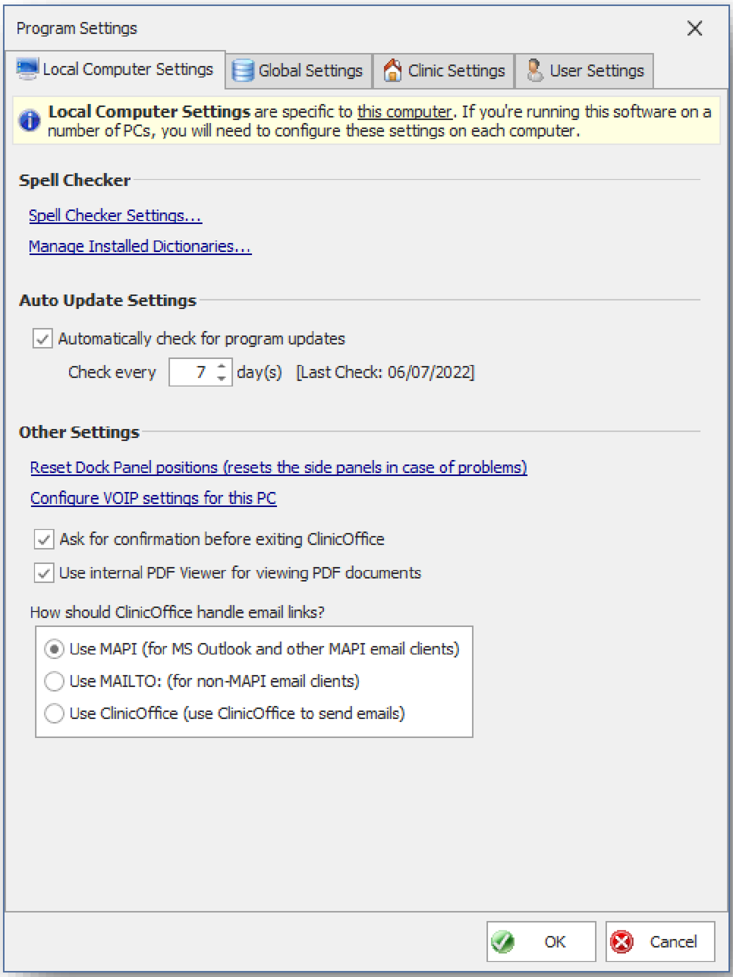
WARNING! It is very hard to reverse a batch update, so please make sure that you are updating the correct records before proceeding. We STRONGLY recommend that you perform a full backup of your database before you proceed.

1. Go to one of the grids capable of batch updating i.e. the Patients grid
2. Perform your search for the relevant records (see "Searching the Database")
3. Left-click on one of the records and press the **Ctrl** and **A** keys both together
4. Right-click on one of the highlighted records
5. Go to **Batch Update** and select the field you wish to update
6. If you are sure you are updating the correct record, click **Yes** to the next message
7. Enter in the new value and click **OK**
8. Again, if you are certain about this batch update click Yes
9. Type **YES** if you are sure you wish to proceed and click **OK**

It may take several minutes to perform the batch update, depending on the number of records you have selected. Once finished ClinicOffice will tell you how many records have been successfully updated. Please click **OK** once finished and you will find that the selected records are now updated with the new value you specified.

Program Settings

The Program Settings has four different sections: Computer Settings, User Settings, Clinic Settings and Database Settings. To access these go to the **View** menu (located above the ribbon bar) and press the **Program Settings** button, the following window appears:-



Local Computer Settings

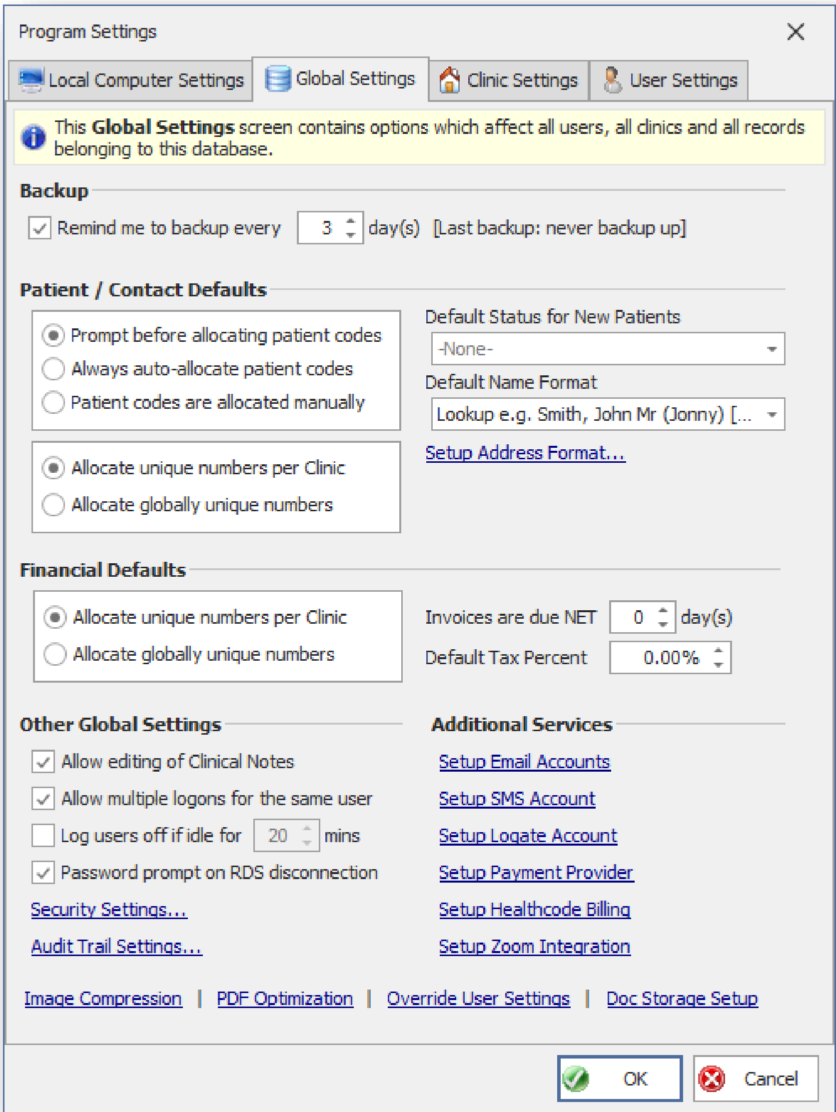
The Local Computer Settings area is for settings directly pertaining to the machine you are running ClinicOffice from. This means that these settings can vary depending on which computer you are using ClinicOffice on. Each setting is explained below.

Spell Checker	From here you can alter the spell checker settings and add new dictionaries for different languages. For more information on this please see the section "Spell Checker".
Auto Update Settings	By default ClinicOffice is set to auto check for updates every 7 days. From here you can change how often it auto checks for update. Alternatively you can stop ClinicOffice auto checking completely.
Other Settings for this Computer	
Reset Dock Panel Positions	If you have altered the positions of the dock panels and wish for them to return to their default layout press the **Reset Dock Panels (resets the side panel positions)**. You will have to close ClinicOffice and reopen it for this to take effect. ClinicOffice asks for your confirmation on quitting the program abruptly, you can choose to un-tick this reminder from here.
Configure VOIP Settings	You can configure or setup ClinicOffice with a VOIP service by clicking on **Configure VOIP Settings**. You can select to use either Birchills VOIP or Skype.

Ask for Confirmation before Closing ClinicOffice	The option **Always ask for confirmation before exiting ClinicOffice** when ticked will mean that when you try to close ClincOffice a message will appear asking if you are sure you want to close it. This is helpful if you have a habit of closing ClinicOffice rather than minimizing it.
Use Internal PDF Viewer for viewing PDF documents	If this option is ticked, when you go to open a PDF document from within ClinicOffice it will open the file using internally using its own PDF Viewer. If unticked then when you go to open a PDF document within ClinicOffice it will use the default PDF viewer you have installed on your computer instead.
How should ClinicOffice handle email links?	There are three options you can select from for this: "**Use MAPI**", "**Use MAILTO**" and "**Use ClinicOffice**". If you have an email program outside of ClinicOffice and it uses the MAPI protocol, then select "**Use MAPI**". If you have an email program that uses MAILTO instead, then select "**Use MAILTO**". If you are not too sure if your email program uses MAPI or MAILTO just try either option and see which one works. If neither of them works then you need to make sure your email program is set as default for one of those protocols. If you are only using ClinicOffice to send out emails then select "**Use ClinicOffice**".

Global Settings

The Global Settings are settings that apply across the entire database you are currently logged into. This means changes made here will apply to all machines and user accounts. An explanation of what each setting does is listed below.



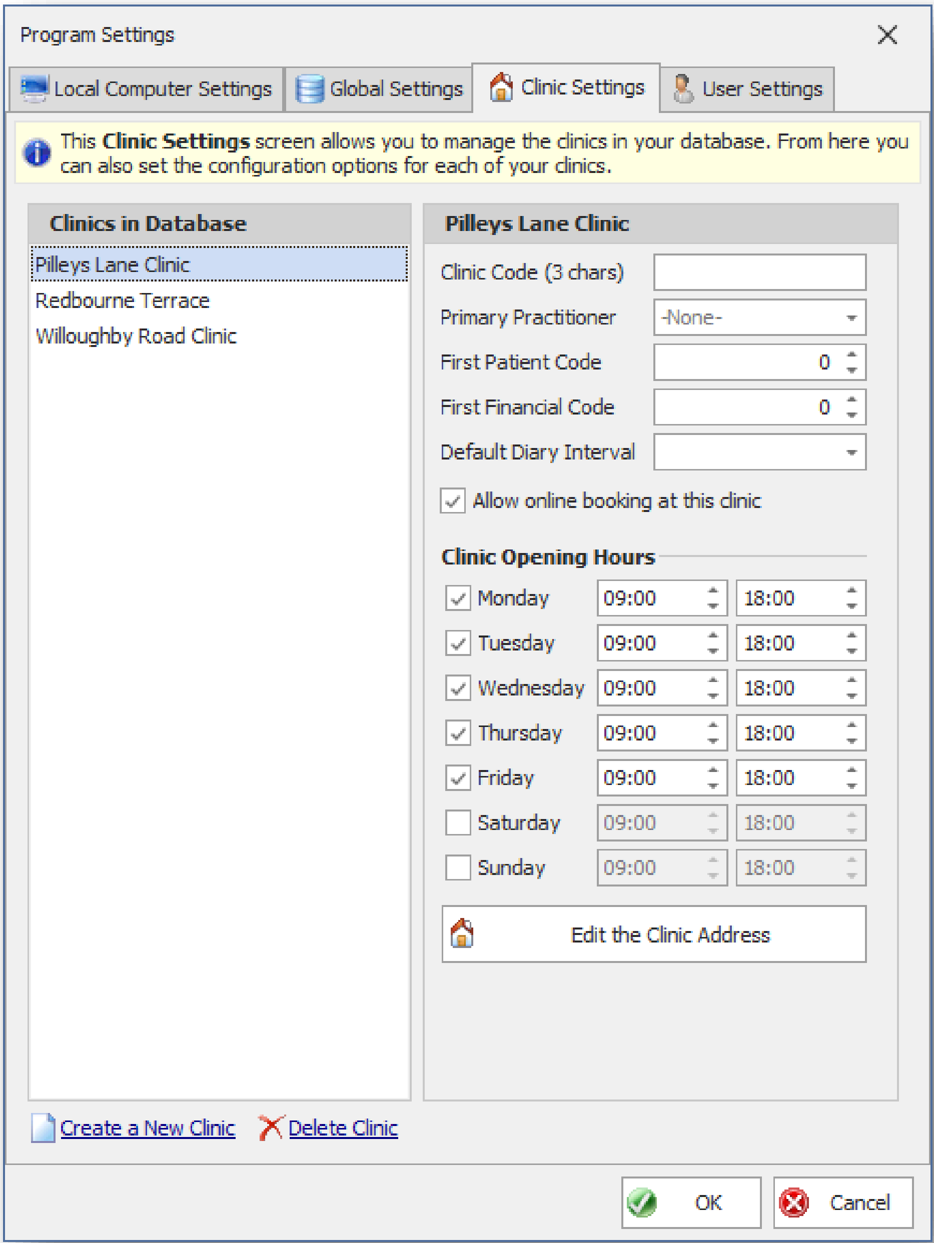
Backup	
By default, ClinicOffice will remind the user to back up every 3 days if no backup has been made since. From here you can choose to change how often you are reminded and even turn off the backup reminders. If you have the Server Edition of the ClinicOffice then the backup will have to be performed on the server machine. If you have the Hosted Edition, then this option will not take effect as the backups are automatically handled for you.	
Patient/Contact Details	
Allocating Patient Codes	By default, when you create a new Patient, ClinicOffice will prompt you to assign a code. From here you can change this so that patient codes are auto allocated. The other option is to set it up so that ClinicOffice will not prompt you or try to auto allocate a code. You can also choose whether you want to allocate unique codes to the Patient records. The difference between the two options is that **Allocate Unique numbers per Clinic** will allow the same code number for a patient/financial record on the database, so long as it is assigned to another clinic. For example, if you have Clinic A and Clinic B both clinics may have a patient with the code of 100. **Allocate globally unique number** will not allow this and hence every code no matter what clinic, will be unique. This option combines the code for all clinics. Normally the **Allocate unique number per Clinic** is fine and that is why it is the default setting.
Default Status for New Patients	Another option is set the patient with a default status. This is helpful when you are creating a new record and wish to assign the patient as 'Active' by default.
Default Name Format	Whenever you are entering a name for a new staff member, the **Known As** field (inside the Staff Member Editor) will also generate a name. This name will be displayed in areas such as the Diary Navigator and drop-down menus. It is here that you can change the way in which the name is generated in the **Known As** field. When you change the **Default Name Format**, it will only affect newly created staff members after that point in time.
Setup Address Format	You can do a similar thing with the way that the address format appears on letters. You can edit the layout via the blue **Setup Address Format** link.
Financial Defaults	
Allocating Financial Codes	Just as you can choose to allocate unique codes either per clinic or globally to each patient you can also have the same options for the finances. Please see the "Patient Defaults" for an explanation of the difference.
Invoices are due NET	ClinicOffice will allow you to specify when an invoice is due to be paid. By default, the **Invoices are due NET** is set to 0 days.
Default Tax Percent	If your clinic charges include tax, then you can specify a **Default Tax Percent** from here. When you do set a default amount any items that you create will have this percentage auto allocated against the new items.
Other Global Settings	
Allow editing of Clinical Notes	By default, users of ClinicOffice can edit Clinical Notes freely and this includes past notes as well. For legality reason this may not be acceptable for certain professions. By un-ticking the option **Allowing editing of Clinical Notes** this will prevent any user from editing past notes, but they can continue to enter new notes. The notes will be automatically time stamped.
Allow multiple logons for the same user	ClinicOffice by default will allow for the same user to login multiple times from different locations. This option is controlled by the **Allow multiple logons for the same user** setting. When un-ticked a single user cannot login using the same username from multiple locations. For example, if you decide to login at the reception desk and you are using the username 'jsmith' and then you decide to login with 'jsmith' on a second computer. What happens is that on the second computer you are logging into you will be given the option to forcibly log yourself off from the reception computer. If you press **Yes,** a message will appear on the reception computer informing you that your login has been overridden and you will be returned to the logon screen; you are given 10 seconds before this happens.
Log users off if idle for	With the setting **Log users off if idle for** you can choose to have idle ClinicOffice users logged off after so many minutes. With this setting ticked it will only ever log off users who have not been using ClinicOffice for the specified number of minutes. If a user is still using ClinicOffice it will not log them off.

Password prompt on RDS disconnection	This option is applicable only for people connecting into ClinicOffice via a remote desktop connection for example ClinicOffice Hosted edition. When enabled, if you lose your remote connection and connect back in, ClinicOffice will require you to re-enter your password.
Security Settings	From here you can set the password complexity required for both staff members and if you have the Online Diary for patients as well. Two-step authentication can also be enabled here for either ClinicOffice or for the Online Diary. This supports both SMS and third-party authenticator apps such as Google Authenticator, Authy or Microsoft Authenticator.
Audit Trail Settings	If you have the Server or Hosted Edition of ClinicOffice then you will have a basic audit enabled. This will log any changes made on the appointment, case, invoice, payment, session, and staff. You can back this more comprehensive or do a custom audit and tell which parts of the software you wish to monitor. With the audit you will note that at the bottom of each editor is a small **Audit History** link. Please note that any changes made before this option is ticked would not have been recorded under the audit history.
Image Compression Defaults	By default, ClinicOffice will offer to compress attached images that you import into the database. The reason for this is that images can exponentially increase the size of your database. By clicking the **Image Compression Defaults…** you can set the size an image has to be before ClinicOffice offers to compress the image. You can also adjust the minimum quality that the image should be after compression i.e. "Don't allow the quality of the JPEGs to fall below 50%".
PDF Conversion Defaults	As another method to save space ClinicOffice will offer to convert an imported PDF to an image; this way allowing it to compress the image once converted. By clicking on the **PDF Conversion Defaults...** link, you can set the minimum size a PDF has to be before ClinicOffice offers to convert it. From the same screen you can set the criteria of how many pages a PDF needs before ClinicOffice offers to convert it and also set to convert the PDF if you are saving so much space for example converts if saving 5% or more.
Override User Settings	Also under the Advanced Settings is the **Override User Settings…**, which can be used only by an administrator of ClinicOffice. Each user of ClinicOffice will have settings which are unique to them, but there may be certain settings that you wish to be the same for all users and this is what the Override User Settings is. It allows for an administrator to create a default setting within ClinicOffice which will override all users' settings. An example is if you wish for all staff members to have certain load mode settings within the diary. Rather than getting all users to adjust it, you can use the options within the Override User Settings panel to set a default value for them.
Doc Storage Setup	ClinicOffice allows for you to attach files to the patient's record or to their notes. This setting allows for you to select where these files should be saved to. By default, the documents will be saved directly in the database. The benefit of this is that the documents will be included when you run a backup of the database, but your database will become exceptionally larger with time. The second option is that you can select to save the files to a network drive or network location. The advantage to this is that it helps to keep the size of your database down, but the disadvantage is that you need a network location everyone can access and you will need to back up your documents separately. From this screen, you can also select to copy all your documents stored within the database and save it to the network location you have specified. You can also do the reverse and import documents from the specified file location into the database. You can also delete all files from the database, but we heavily recommend that you do this after ***careful planning***.
Additional Services	
Setup Email Accounts	By clicking on the **Setup Email Accounts** link, it will bring up a window which will allow you to enter your email account server settings. The window will also allow you to specify your default email account, how often ClinicOffice should check for emails, the outgoing email account, your SMTP details, and your proxy server settings. Please note that you require the Email Module to have full access to these settings. This window is still accessible even if you do not have the Email Module. For more information, please see the "Emailing" section.
SMTP Servers	If you click on the **SMTP Servers** link a new window will open which will allow you to enter your email SMTP server details into.

Setup SMS Account	When you click on the **Setup SMS Account** the next window that appears will allow you to enable the SMS service. You can also buy additional credits via this screen.
Setup Loqate Account	The link **Setup Loqate Account** will open a window that will allow you to enter your Loqate account details. If you do not have an account, you can visit their website clicking the link "**Go Straight to Sign-Up Form**" or click the "**Step-by-step Guide**" link for a setup guide if you need any help with this.
Setup Worldpay Account	The link **Setup Worldpay Account** will open the Worldpay Setup window which will allow you to register for a Worldpay account, enter your account details in and configure any settings relating to the Worldpay service.
Setup Healthcode Billing	The last link Setup Healthcode Billing will open the Healthcode Setup window that will allow you to enter in your Healthcode account details and enter in your provider numbers. From the same window you can also map the "Industry Standard Codes" to your item/services as well.

Clinic Settings

The Clinic Settings is where the settings directly apply to the individual clinics. From this screen you can also create additional clinics or archive older ones.



Create a New Clinic	Allow for you to create a new Clinic within the database. Each clinic will have its own settings on this screen.
Delete Clinic	Remove the selected clinic. If the clinic has anything assigned to it for example staff, patients, appointment then the clinic will not be removed but will in effect be archived instead.
Clinic Code	The three-letter code will be placed at the beginning of the clinic's patient codes or financial codes. This helps to identify the difference between where each record belongs to.
Primary Practitioner	Tells ClinicOffice if the clinic has a primary practitioner. When assigned new patients created for the clinic will automatically be allocated to this practitioner.
First Patient Code	This is to be used in conjunction with the Global Settings -> Patient Defaults -> "Allocate unique numbers per clinic". The first patient created for this clinic will be assigned with this number as their code. Thereafter each patient will be assigned with the current highest code number plus one.
First Financial Code	This is to be used in conjunction with the Global Settings -> Financial Defaults -> "Allocate unique numbers per clinic". The first financial record created, such as an invoice, payment, credit note or refund for this clinic will be assigned with this number as their code. The numbering works independently for each form of financial record.
Default Diary Interval	If your diary is set to "Use preferred intervals" then the value that you set here will be what the diary will default to when you are viewing it in room view or when you are viewing more than one staff member when viewing the diary by staff.
Allow online booking at this clinic	This is applicable if you have our Online Diary add-on module. By default, all clinics will be bookable online. By unticking this setting, a patient could not book an appointment at that clinic.
Clinic Opening Hours	This assigns the opening hours of the clinic and will change the bookable hours available on the room view of the diary. This does not affect the diary when viewed by staff but that is because this view references the staff working hours instead.
Edit the Clinic Address	Allows you to edit the default address. This is used as a reference by some reports that will merge through the clinic address.

Note: *If you decide to edit the Start numbering Patient/Financial Codes, ClinicOffice will not backdate. All records created before this alteration will not be changed and their codes will stay the same. Only records created after the alteration will be affected.*

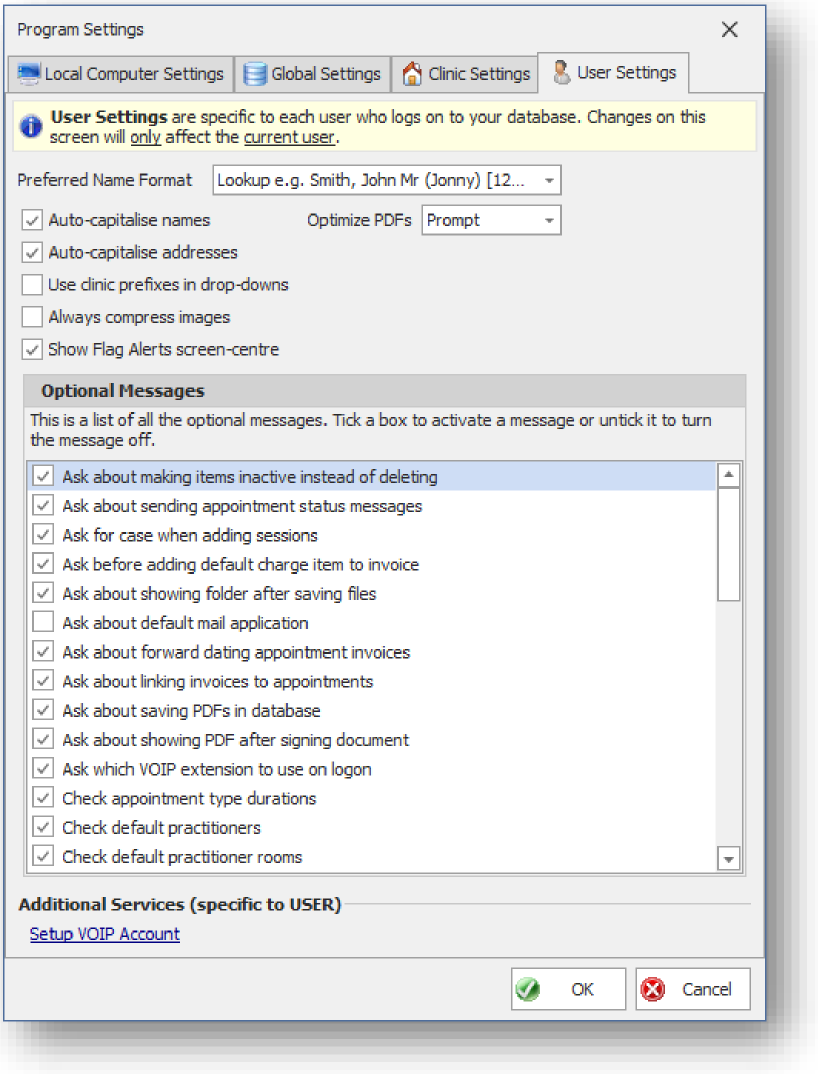
Creating a New Clinic

The steps below will help you to add a new clinic to your database.

1) Go to the **View** menu (above the ribbon bar)
2) Click the **Program Settings** button
3) Go to the **Clinic Settings** tab
4) Click the **Create a New Clinic** blue link
5) Enter in a name and click **OK**
6) You can now enter in the clinic code, primary practitioner, and opening hours
7) You can also enter the clinic address by clicking the **Edit the Clinic Address** button
8) Once you are happy with the settings click OK at the bottom of the **Clinic Settings** screen

User Settings

The User Settings is unique to the user logging into ClinicOffice. Each setting on this screen is explained below.



Preferred Name Format	From here you can change the way in which your name appears in COv5. By clicking on the field, you are presented with several different formats which are: Lookup, Code Lookup, First/Last, Title/First/Last, Formal, Informal, and Complete. The default setting is set to Lookup. This overrules the Default Preferred Name Format present under the Database Settings.
Auto-Capitalise Names/Addresses	You can stop the auto-capitalising of names and addresses simply by un-ticking either the **Auto-Capitalise Names** or **Auto-Capitalise Addresses**.
Use clinic prefixes in drop-downs	This will display the clinic prefix when selecting the clinic in any drop-downs such as the 'Active Clinic'.
Always Compress Images	When the option **Always Compress Images** is ticked all images that are scanned or imported into ClinicOffice will be automatically compressed so that they take up less room, hence saving space.
Show Flag Alerts screen-centre	This will make any flags that are attached to a record appear centre screen like an alert.
Optimize PDFs	ClinicOffice gives you the option to keep your database size to a minimum by offering a PDF compression when importing a PDF document. You can select from here whether it should just prompt you, to always do it by default or to have this feature switched off entirely.
Optional Messages	Some tasks you may need to carry out multiple times (i.e. moving appointments around); depending on the task a message may appear each time you carry this task out. This may become irritating, so ClinicOffice has the option to turn these messages off simply by un-ticking the box next to the message type. Alternatively, if you want a message to reappear simply re-tick the box.

Two-Factor Authentication (2FA)

ClinicOffice has the two-factor authentication feature for both the main core program and the Online Diary addon. This can be enabled for both staff and for patients.

Q) What is two-factor authentication?

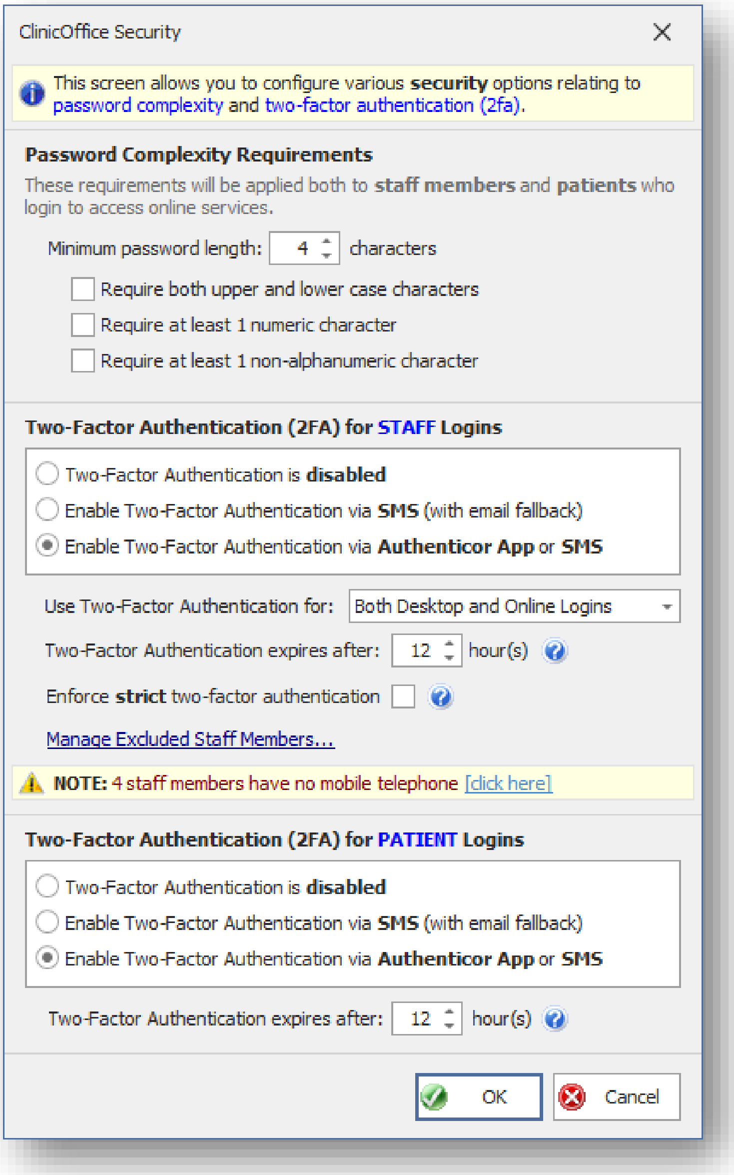
A) Two-factor authentication (2FA), sometimes referred to as two-step verification, is a security process in which users provide two different authentication factors to verify themselves. In the first step a username or password is required. In the second step a security token is required to verify that you are who you say you are.

Q) What methods of two-factor authentication does ClinicOffice use?

A) ClinicOffice and in turn the Online Diary can utilise any authenticator application such as Google Authenticator, Authy or Microsoft Authenticator. Both services can also use SMS messages as the two-factor authentication method. In addition to this as a fall-back service the Online Diary can utilise email as well.

To enable the two-step authentication in ClinicOffice, please follow the steps below.

1) Go to the **View** menu
2) Click **Program Settings**
3) Go to the **Global Settings**
4) Click **Security Settings**
5) Under the 'Two-Factor Authentication (2FA) for Staff Logins' section, select either '**Enable Two-Factor Authentication via SMS (with email fallback**' or '**Enable Two-Factor Authentication via Authenticator App or SMS**'
6) Select what you want to use the two-factor authentication for, whether you want this to apply to the Desktop (ClinicOffice) or Online Logins (Online Diary) or both options.
7) Select when you wish for the authentication to expire. By default, the authentication expires after 12 hours, so in effect the next working day you will need to authenticate again. If you prefer staff to do this every time, then you can set this to 0 or you can extend the hours up to 168 which would mean a staff member would only need to use the second authentication once every week.
8) When finished click the **OK** button



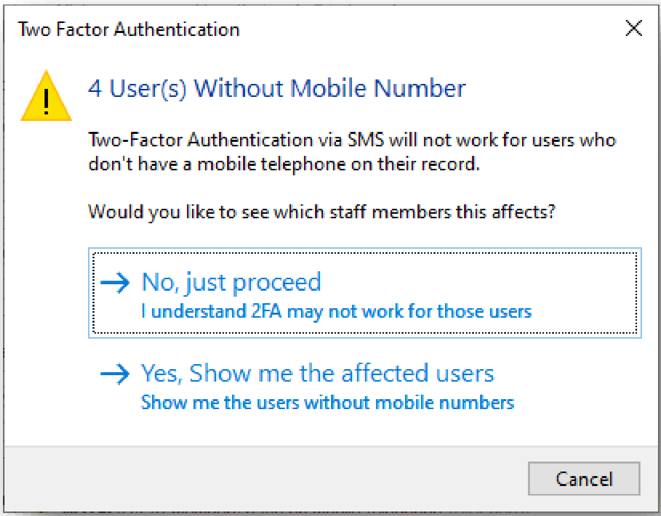
Q) What is the "Enforce <u>strict</u> two-factor authentication" option?

A) When this option is not ticked, it will allow for people who do not have an authenticator app or a mobile number recorded against their staff record, to bypass the two-step authenticator (2FA). To bypass the 2FA, the user must select '**authenticate via SMS instead**' and then on the next screen select '**Click here to bypass**'.

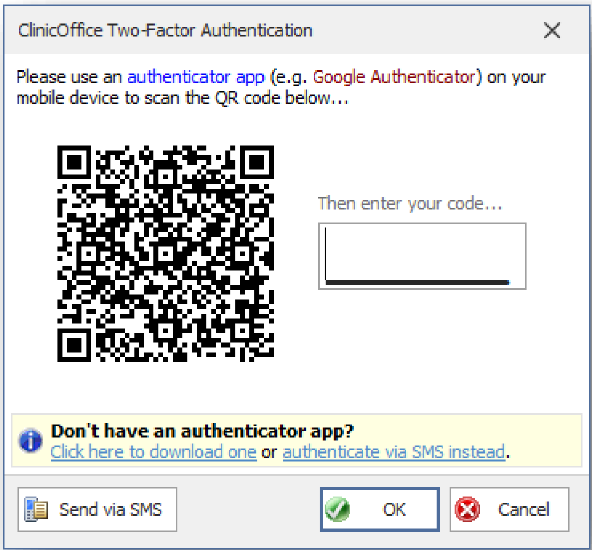
This feature exists to help with a gradual transition to 2FA so at least those users who have no mobile number recorded can still use the software. It is also useful if your local clinic has no internet as 2FA depends on an internet connection to verify the security code.

If security is a prime concern, then we personally recommend that this option is **ALWAYS** ticked and just make sure that everyone has a mobile number recorded against their record.

9) If you have selected to use SMS as either the primary or secondary means of two-factor authentication, then on the first time clicking **OK** you will be presented with the message below, which will only appear if some staff do not have a mobile number. You can select the option '**Yes, Show me the affected users**' to view who falls into this category.



10) If you now log out of ClinicOffice and go to log back in, when you click the Login button the two-factor authentication screen will appear. If you do not already have an authenticator app, click the link, '**Click here to download one**'.



11) Once you are into your authenticator app, click to add a new account and either select the option to scan a QR code or to add another account. Point your phone's camera at the screen with ClinicOffice to scan the current QR Code.

12) Once ClinicOffice has been added go into this account and find the security code. Enter it into the ClinicOffice's two-factor authentication screen and click **OK**.

If you prefer to just send yourself the security code via SMS, click the **Send Via SMS** button. If your staff record has a mobile number recorded, you will be sent a security code to your phone that in turn you can enter into the authentication screen on ClinicOffice.

The Patient/Contact Selector

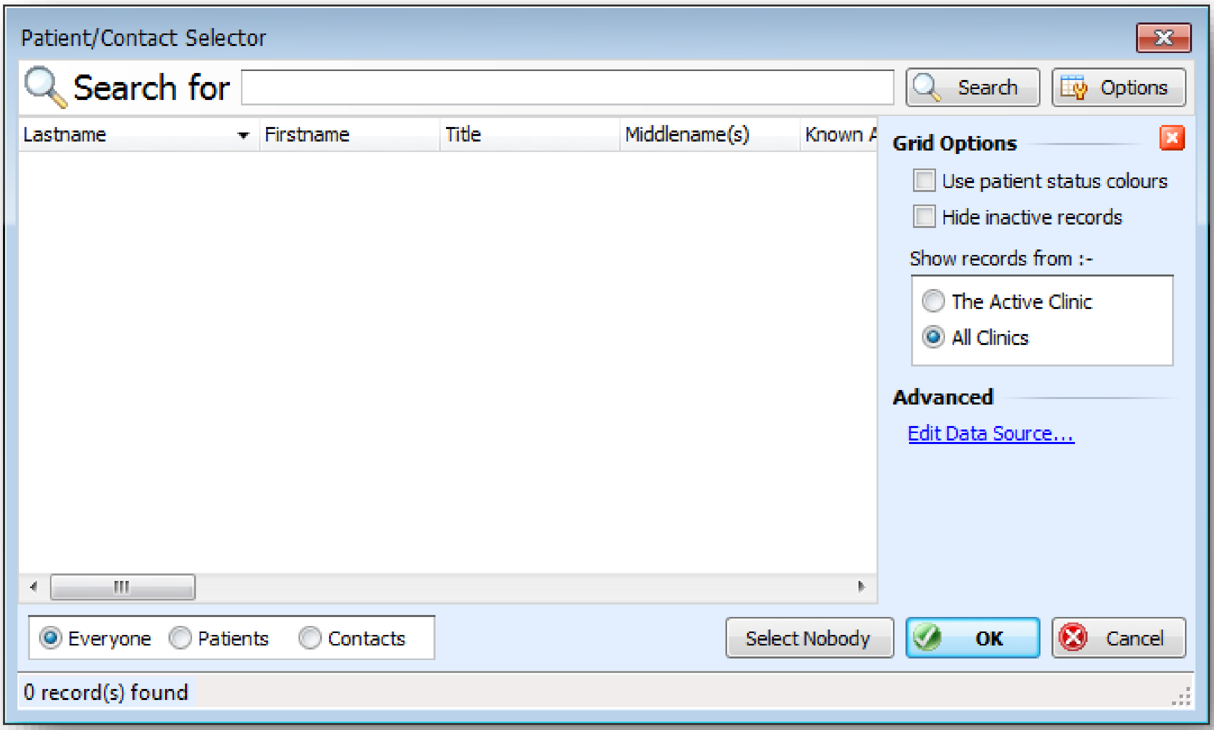
Some fields in ClinicOffice refer to another person (contact or patient) in your database. For example, take a look at the **patient/contact** field in the following screenshot: -

A Patient/Contact Field

Notice that there is a magnifying glass button () and a new button () to the right of the field.

Clicking the **new** button allows you to enter a new person – giving you the choice as to whether it's a new contact or patient where appropriate. Clicking the **search** button will bring up the patient/contact selector screen as shown below:-

The Patient/Contact Selector



Performing a Quick Search is usually the easiest way to find a person. For example, you can enter a patient's last name, first name or their code and click **SEARCH.** If you wish you can search on both the last and first names by entering it in the 'Lastname, Firstname' format. Please note that when you search in the first name and last name order then no contact or patient records will be displayed. When you leave the search field blank, click **SEARCH** it will show all the contacts and patients in your database.

You can also filter this screen by using the **Everyone, Patients** or **Contacts** options at the bottom of the window.

Under the **Options** you can select to show a patient's status colour if you have assigned colours to the patient's status. You can also hide inactive patient records. If you have more than one clinic you can select to either search on patient/contacts from your current selected clinic or from all clinics.

The **SELECT NOBODY** button closes this screen and allows you to remove a reference to a patient/contact.

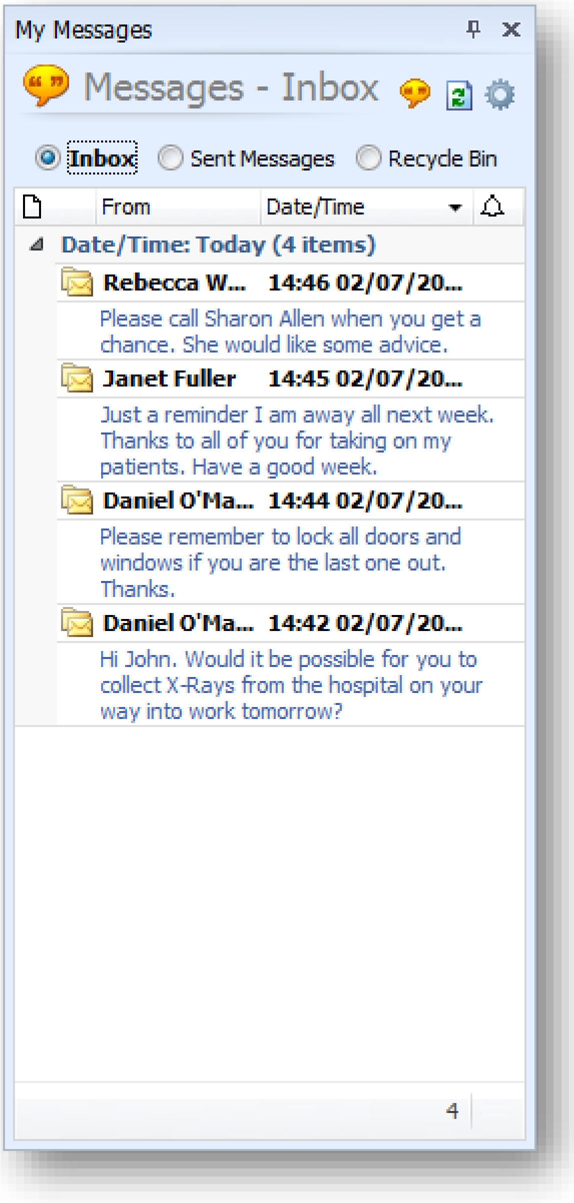
Once you have selected the person you were looking for, click **OK.**

ClinicOffice Messaging

ClinicOffice features its very own internal messaging system – very much like an email system but integrated into ClinicOffice. This feature allows you to send messages to other staff members who also use the system. New to ClinicOffice is the Message Centre. Here you can view the Inbox, all your messages are now stored like real emails.

If you are running ClinicOffice over a network and you send a message to another user who is currently logged on, then the message will automatically appear on their screen along with an audible notification. If the user is not currently logged on, then he/she will receive the message as soon as they next logon.

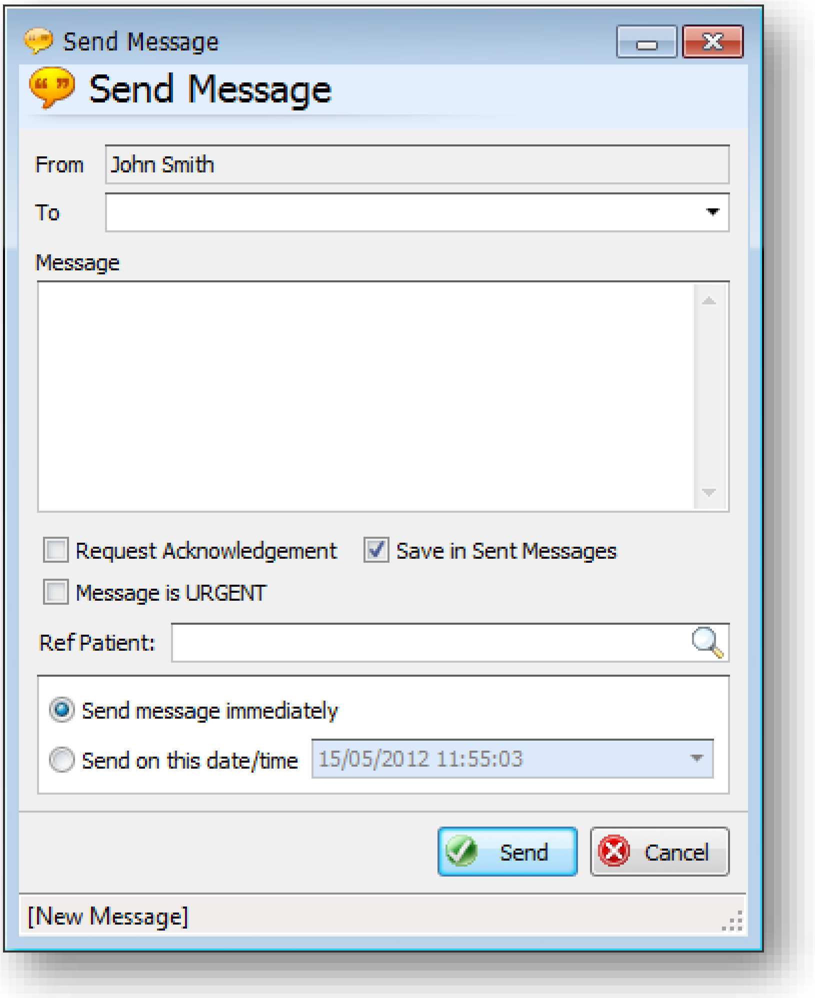
The Message Centre



Sending a Message

To send a message, click the  button which is on the ClinicOffice Home ribbon bar (across the top of the screen). The following window will then appear:-

Sending a Message



Here's how to send a message:-

- Left-click on the **To** field, and then select the staff member(s) by ticking the boxes next to their names. You will know if a staff member is logged onto ClinicOffice because their name will appear in green.
- Type in your message in the **Message** box.
- If you want a receipt to be sent back to you when each recipient reads the message, then tick the **Request Acknowledgement** box.
- If this is an urgent message, then tick the **Message is URGENT** box.
- If this message is about a specific patient or contact, then you can include a link to the patient (see "The Patient/Contact Selector" for more information on how to do this).
- Decide when the message should be sent. Normally, you would just send the message immediately but you can select a future date if you wish.

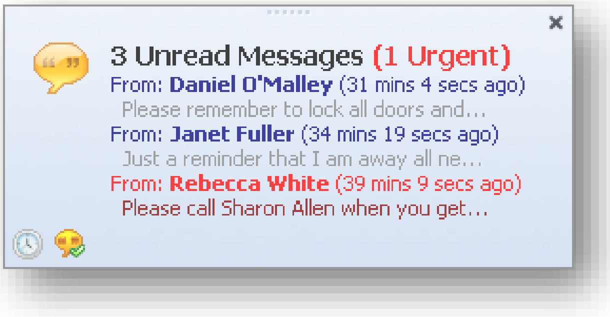
Click the **Send** button to send the message or **CANCEL** to abandon it.

Receiving Messages

When you receive a message, a window will pop up in the bottom right hand corner of your screen. If the message is marked as URGENT, it will appear in red and next to the Unread Messages it will state how many of those are urgent.

You will also hear an audible alert to let you know that you've received a new message.

Received Messages

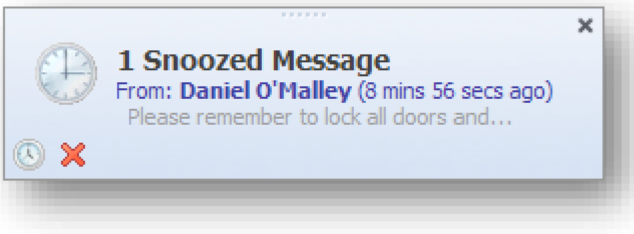


Take a look at the above messages. The total number of unread messages is mentioned at the top of the window along with the number of urgent messages. You will also note that the messages stack up on the window. This window can preview up to 4 messages, however you can view all messages by right clicking on this window and selecting your message which you wish to read in full.

Towards the bottom left of the unread message screen are two buttons. The first is the **Snooze All** ( ) button which allow you to hide all messages currently previewed for a specified period of time. The second button is the **Mark All as Read** ( ) button which will mark all messages present as being read.

If you decide to snooze a message it will reappear at the specified time and will look like the message below.

Snoozed Message



Again this window can preview up to 4 messages. You will note that on the snoozed message you can either choose to snooze the message for a further period of time, alternatively you can Remove All Snoozed Message Reminders ( ).

If the sender asked for an acknowledgement, then you will have to acknowledge the message. You can do this by opening the message and then clicking the **Acknowledge** button.

This message will appear in the bottom right hand corner of the screen (same area as a non-urgent message). You can remove the message in the same manner you would a normal message.

To delete a message right-click on it, in the message centre and select **Delete Message**. Alternatively you can open a message and click the **Delete** button. You can view all deleted messages in the Recycle Bin by selecting Recycle Bin.

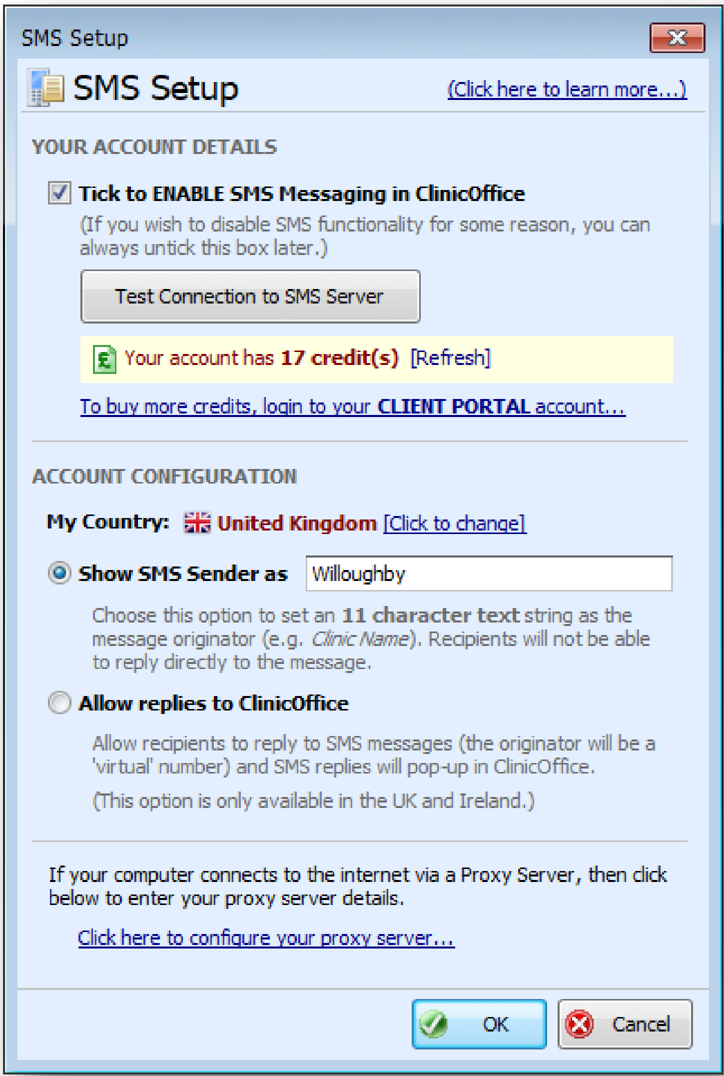
You may remove all deleted messages permanently by again right-clicking, then selecting **Empty Recycle Bin**. You can also empty the recycle bin through the **OPTIONS** button.

The right-click menu also gives you the option to **Purge Old Messages...**; this enables you to remove all messages that are older than a certain period of time (i.e. older than 2 months). This option permanently deletes all messages within the Inbox, Sent Messages and Recycle Bin.

Sending SMS Messages

To be able to send an SMS message you will need to first enable the SMS Messaging service. This will register an account for you with us. To enable this, please follow the steps below.

1. Go to the **View** menu
2. Click the **Program Settings** button
3. Go to the **Global Settings** tab
4. Click the blue link "**Setup SMS Account**" [the screen below will appear]
5. Tick the option "**Tick to Enable SMS Messaging in ClinicOffice**".



You can test that your ClinicOffice is communicating with our SMS service by clicking the button **Test Connection to SMS Server**. If the connection fails, please alter your firewall or antivirus ClinicOffice through.

In order to buy more credits, you will need to login to your Client Portal. You can do this by clicking the blue link below the text that provides the credit count. If it is the first time, you will need your ClinicOffice account details in order to log in. If you do not have these, then please feel free to send Pioneer Software an email requesting for this information. After logging on for the first time you will be able to assign your own username and password for future access.

Account Configuration

The **My Country** should default to your country of residence, but if it does not you can change it by clicking the blue link next to the field.

If you do not wish for people to be able to reply to the SMS messages, then select the option "**Show SMS Sender as**". This will usually have something filled in from your clinic name, but you can alter it. Please bear in mind that it can only be 11 characters long due to SMS limitations.

If you prefer for people to be able to reply to your SMS messages, then you can facilitate this by selecting "Allow replies to ClinicOffice". The number they reply to, is a virtual number provided through our SMS service.

Once finished, click **OK**.

There are several ways you can send an SMS message within ClinicOffice. A few of these examples are listed below.

<u>**Example 1:**</u>

1. Go to the **Diary** in ClinicOffice
2. Right click on an appointment
3. Select **Patient Record**
4. Click **Send Text Message**

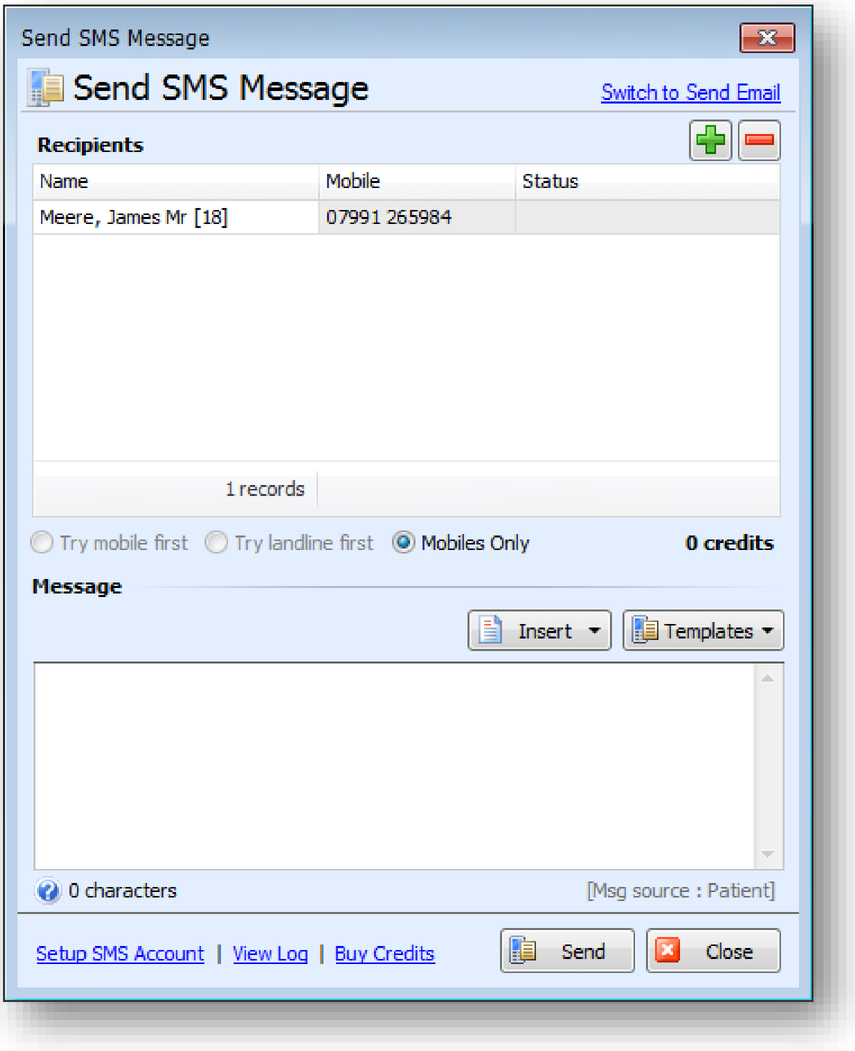
<u>**Example 2:**</u>

1. Go to the **Patients** section in ClinicOffice
2. Double click on a patient's name to open their record
3. Click the mobile icon located in the mobile field.

Example 3:

1. Go to the **Patients** section in ClinicOffice
2. Left click on one record
3. Press **CTRL**+**A** on your keyboard
4. Right click on one of the highlighted records
5. Select **Patient/Contact**
6. Click **Send Text Message**

Any of the examples above will present the window below:-



You will see the name of the recipient and their mobile number. If you followed the steps in **Example 3** you will have multiple recipients. You can add or remove a patient/contact by clicking the add button or remove button. Within this same window you are given three options to either send the message to a mobile first, to send it to a landline first or to send it to a mobile only. The first option means it will try to send a message to a mobile first but if no mobile number is present it will try the landline number instead. The second option is a reverse to this in that it will try the landline number first but if no landline is present it will try the mobile number.

You are free to type whatever message you want to appear. You can customise it by clicking the **Insert** button, which will offer a selection of merge fields. If you follow **Example 1** the merge fields are a choice of name formats and information pertaining to that appointment. If you follow **Example 2** or **3**, you still have the different name formats but you also have the appointment information for both the patient's next and their previous appointment. In all three examples the account balance is available.

When you select a merge field from the **Insert** button, the text will be inserted wherever the text cursor is positioned in the Message window. If you were to select the merge field "FullName" for example the text would be inserted as **<FullName>**. It will only merge the information for the recipient once you click the **Send** button.

If it's a message that you will use regular, then you should save it to your templates by clicking on the **SAVE** button and save it with a recognizable name. You can use this message in the future by clicking on the **TEMPLATES** button and selecting it. Also, by clicking on the **INSERT** button you can place in an auto generated field which will change according to the individual's details.

Once you are satisfied with the message and the selection of recipients you are sending it to, click the 

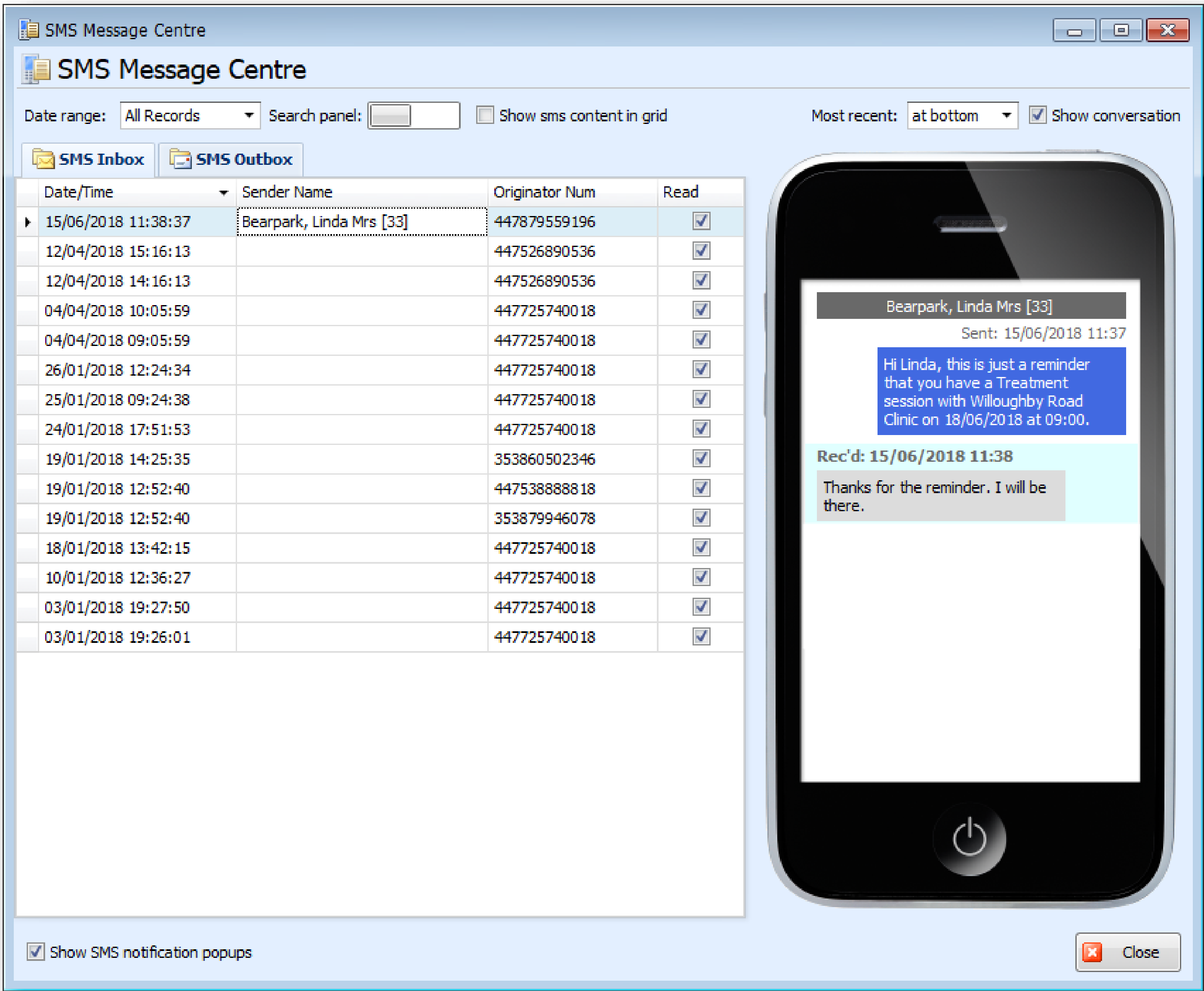
button. ClinicOffice will give you a little report afterward to let you know how many SMS messages were successfully sent. It will also change the Status under Recipients in the SMS Message window. If the message was not successful then it will say FAILED, it will highlight in red and give it a small description of why it failed (underneath the patient).

An SMS can be sent automatically as an appointment reminder or appointment confirmation for example. To see how to do this, please see the section "The Patient Contact Centre".

Note: ClinicOffice can only send SMS messages to patients who have a mobile phone number or who have a BT landline. Also, SMS messages are 160 characters in length, so if this character limit is exceeded you will be charged for two messages rather than one.

SMS Message Centre

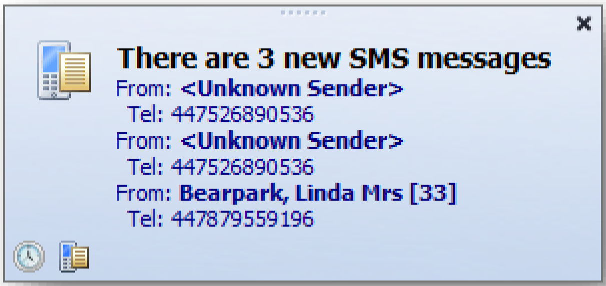
The SMS Message Centre allows for you to see a record of all SMS messages that have been sent from the system and equally, if enabled, all messages received in one place.



The centre is broken up into two tabs: SMS Inbox and SMS Outbox. The options for the centre are listed on the next page.

Date Range	You can specify the date range of SMS messages you wish to view
Search Panel	When enabled an additional search field will appear. This allows for you to search on the sender/recipient name and their number.
Show sms content in grid	When ticked the contents of the SMS message will appear within the grid.
Most recent	On the right hand side of the SMS Message Centre is a small preview window of the conversation you have had with the current contact you have selected. The “Most recent” field allows for you to select the order that you wish to see the message in.
Show conversation	Enable for a preview of messages sent to the current contact selected. This will include both current and past messages sent and received.
Show SMS notification popups	When a new SMS message is received a small pop-up window will appear.

There is the option to “Show SMS notification popups”. When this is ticked a small message will appear every time a new SMS is sent back. These messages can also stack in the preview as well if you have more than one message.



If you wish to review these messages later you can click on the **Snooze** button ( ) and set it not to reappear again for up to 8 hours. If you wish to read them and tell the system that you have read them you need to click the **Open SMS Centre** button ( ). As shown above, from the SMS Centre you can see the contents of the messages that have come in. If you tick the “Read” checkbox it will prevent the popup notification for this SMS message from appearing again and you.

Q. How do I stop these SMS popups from appearing?

A. Go into the SMS Message Centre and untick the option “Show SMS notification popups”. This will no longer appear for any user within ClinicOffice.

Q. How do I prevent some of my staff from viewing the SMS Message Centre and these SMS popups?

A. You can prevent some users from viewing either of these by going to their access rights or access groups and unticking the option “SMS Message Centre”, which sits under the “Other Options” area of the access rights screen. For more information on how to do this, please see the section “Staff Member Access Rights”.

Q. Can SMS messages be viewed on the patient’s or contact’s record?

A. Yes, they can. Any SMS messages pertaining to the patient or contact can be seen on their record via the Contact Journal tab.

Emailing

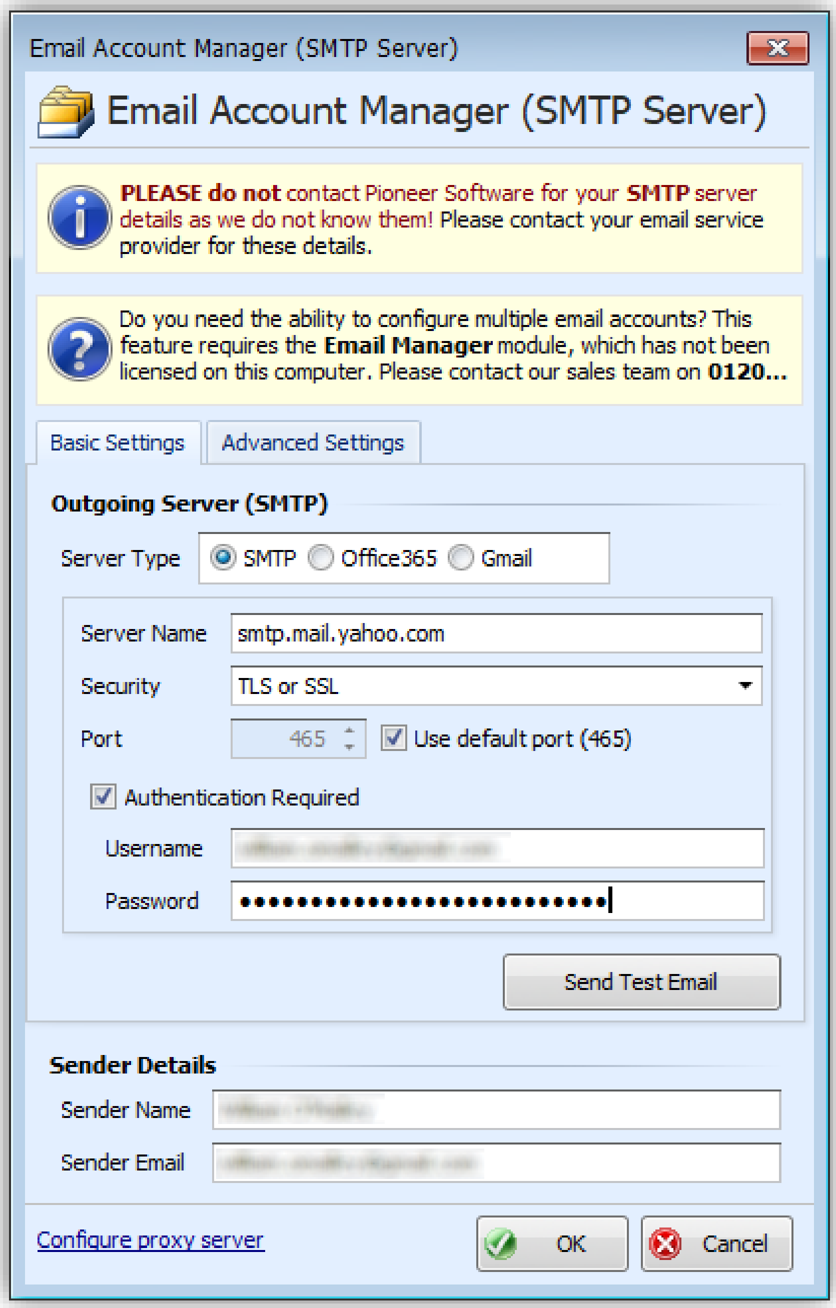
In ClinicOffice there are two different emailing systems. The first is a Text Only Email system that comes with the ClinicOffice by default. This will allow you to send a basic email and is perfect for sending reminders to patients about a future appointment. One of the downsides to this is that ClinicOffice does not store the details of the email that has been sent and you cannot receive emails within ClinicOffice either.

The second system is the Email Manager module which will allow for you to send/receive emails in an html format. This works like a full email client.

Text Only Emailing

To send a text only email you will need to first enter your SMTP email server details. To register your email account, go to the **View** tab, click on the **Program Settings** button, click on the **Global Settings** tab, and then click the **Setup Email Accounts** blue link. The following window will appear: -

SMTP Server Manager Window



With the standard Text Only Email system you can store only one Email Account with its SMTP server details. The table below explains what each part of the SMTP Server window is there for.

Basic Settings	
Outgoing Server (SMTP)	
Server Type	Allows you to select between regular SMTP, Office365 Business and Gmail. When you select SMTP you will need to manually enter in your email server SMTP settings. If you select either Office365 Business or Gmail you can just click to sign into either service and ClinicOffice will automatically link up to either account.
Server Name	This is your outgoing mail server. This will be provided to you by your email provider. It will very often be in a format like this: *smtp.example.com*
Security	You can select either “None”, “StartTLS” or “TLS or SSL” for your security protocol. Either TLS or SSL allows for a secure encrypted connection between your email client (ClinicOffice in this case) and your email server. “StartTLS” means it will take an existing insecure connection and make it secure. Not all email providers will provide this functionality so you will need to check.
Port (Default 25)	Some email servers require a specified port to work through. Again your email provider will specify if a unique port is required for the SMTP Server. If you tick “Use default port” it will use port 25 for “None” and “StartTLS” or port 465 for “TLS or SSL”.
Authentication Required	Your Email Provider will specify if authentication is required. If it is then tick this checkbox.
Username	This is the main username that you would use to access your email server. So in many cases this will be your main email address. If your email server is on a local machine then this will probably be different.
Password	This is the password you use to access your emails on the email server.
Sender Details	
Sender Name	This is the default name that will appear when the recipient receives an email.
Sender Email	This is the default email address that the recipient of an email will see. For example if you email an appointment reminder this is the email address that will be seen.
Send Test Email	After you have entered your details it would be wise to click this button. If a successful connection has been made a message will appear saying ‘A test email has been sent successfully’. If the email fails to send it will provide you with an error code, which comes from your email server and explains why it has failed.
Configure your proxy server	If you have a proxy server on your system then you can configure your proxy by clicking on the blue link.
Advanced Settings	
Authentication Method	SMTP supports different authentication and security mechanisms. By default, this setting is set to “Auto” which means ClinicOffice will automatically select the most appropriate “Simple Authentication and Security Layer” (SASL) for you. You can, however, change the type SASL used. Please note that not all email servers work with all forms of SASL mechanisms.
Authentication Options	Allows you to select an option for the authentication. By default, this is set to “None”. This does NOT mean there is NO authentication enabled, but it means that there are no additional authentication "Options" enabled such as "Use Local Domain As Default".
Security Protocol	This allows you to select the security protocol your server uses i.e. TLS 1.1 or TLS 1.2. If you leave it to TLSAuto, the highest TLS certificate that your email server uses will be selected.
Mail server timeout after	Like any local email client, ClinicOffice will attempt to connect to your email server. If it fails, it will inform you that it cannot connect and why it cannot connect. By default, it will try for 30 seconds with each send and receive attempt. Using this setting you can increase the length of time before ClinicOffice will timeout.

Sending Text Only Emails

There are multiple areas where you can send an email. These areas include any editor where there is a built-in email field (i.e. patient, contact, staff editors). You can also send an email via the right click menu in the appointment diary, on the appointment, patient and contact grids and a number of the grid reports as well. There is an option to send an email via the Patient Contact Centre (see the section "The Patient Contact Centre" for more information). You can also email reports and attach them to an email. Below are a couple of examples of sending a text email. The first example will show you how to email a single patient via an appointment. The second example will show you how to email an invoice report as a PDF attachment.

Example 1:

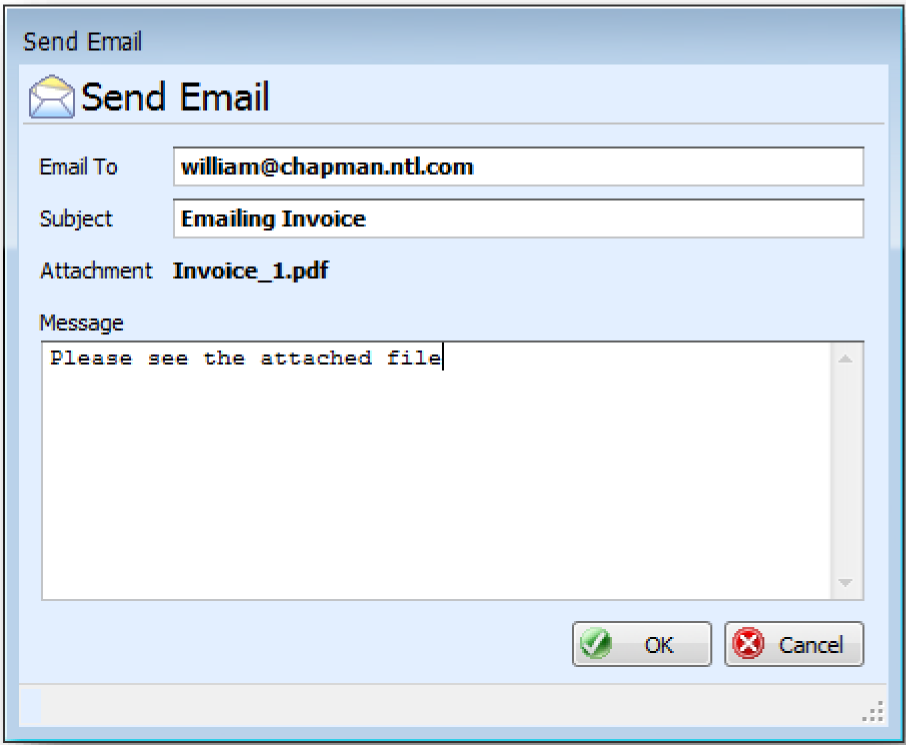
- Go to the **Appointment Diary**
- Right click on an appointment
- On the menu go down to **Patient Record**
- Select **Send Email**
- The "Send Email" window will appear

Example 2:

- Open an existing invoice
- Click the **Print** button
- Select one of the invoice reports
- Click the **Email As** button and select PDF File
- Click OK

You will note that on both occasions the same window will appear. In example 2 you will also see the name of the attached file.

Send Email window



You will note the recipient(s) of the email will appear in the window at the top. You can put the subject of the email into the **Subject** field and enter the contents of the email into the **Message** field below. Once all is acceptable click the **OK** button and your email will send through to them.

Problem: When trying to send an email a message saying "MAPI Email Client Problem" appears, what do I do?

This message will appear because ClinicOffice will initially try to use a MAPI compliant email program such as Microsoft Outlook. To fix this however you can tell ClinicOffice to use itself when sending emails from within the program. The steps below will help you with this.

1. Go to the **View** menu in ClinicOffice
2. Click the **Program Settings** button
3. Under the **Local Computer Settings** tab please select "**Use ClinicOffice (use ClinicOffice to send emails)**"
4. Click **OK**

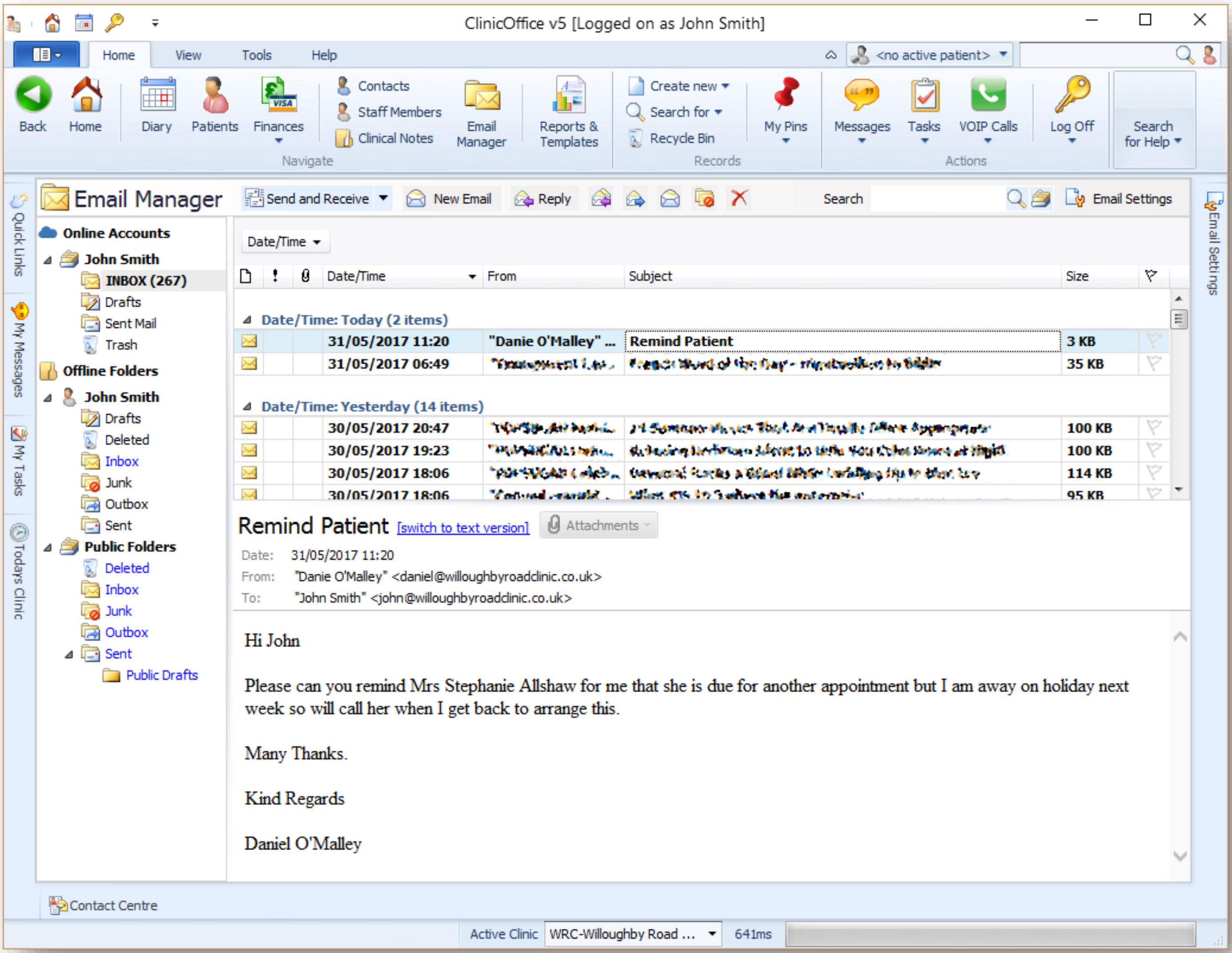
After following the above steps you will now find that any emails from ClinicOffice will be sent from within the program.

Note: *You can store up to 3 email addresses for one patient. This means that when you click to send an email, whether this is using ClinicOffice or your external email client you can send the email to all 3 addresses.*

Email Manager

The email manager is an additional module in ClinicOffice v5 and works in a similar manner to many other desktop email clients. You can access it via the **Email Manager** button on the Home ribbon bar at the top of the program.

The Email Manager

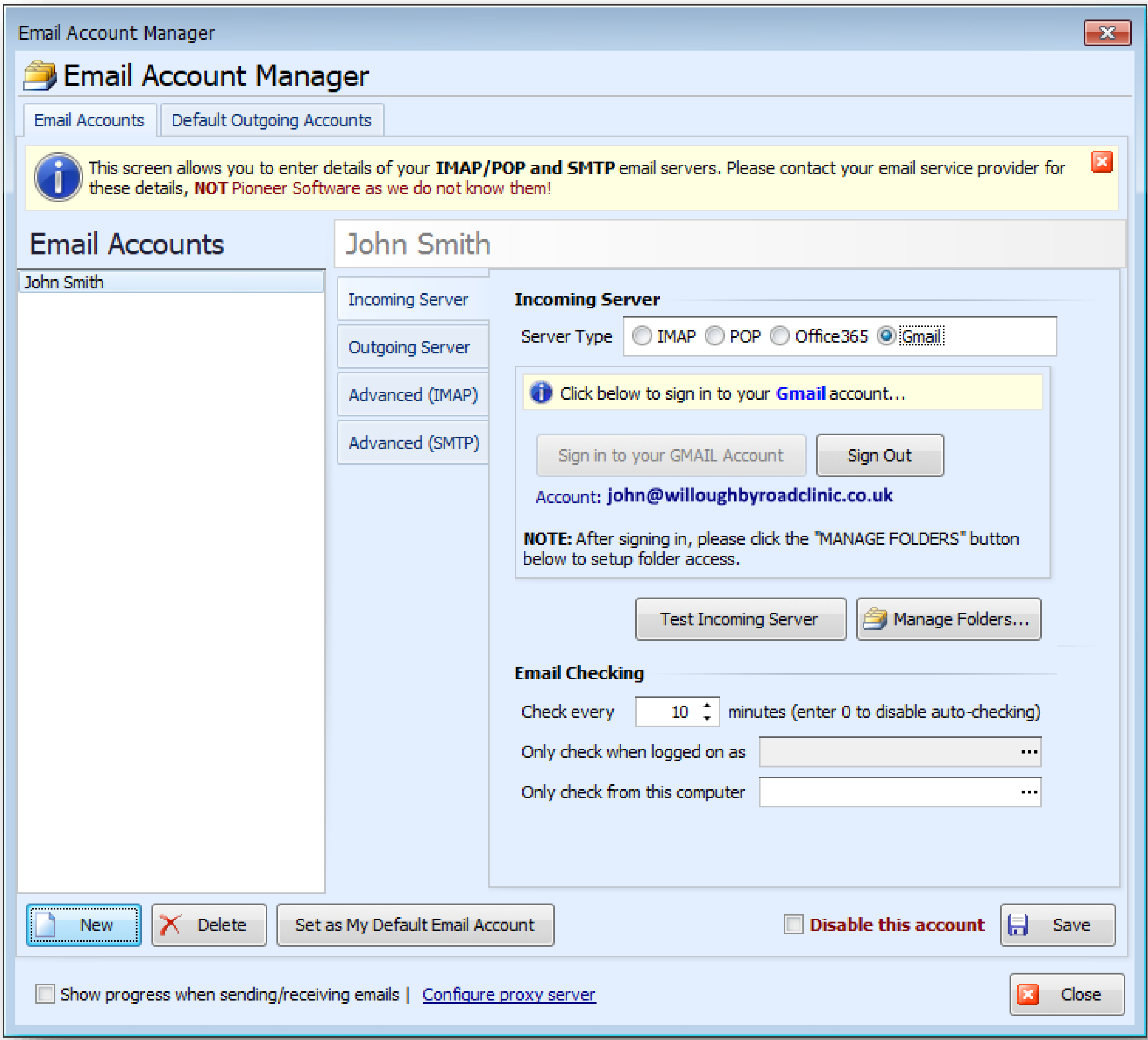


Email Account Setup

To use your email account through ClinicOffice you will need to set it up within the program. To do this, please follow the steps below.

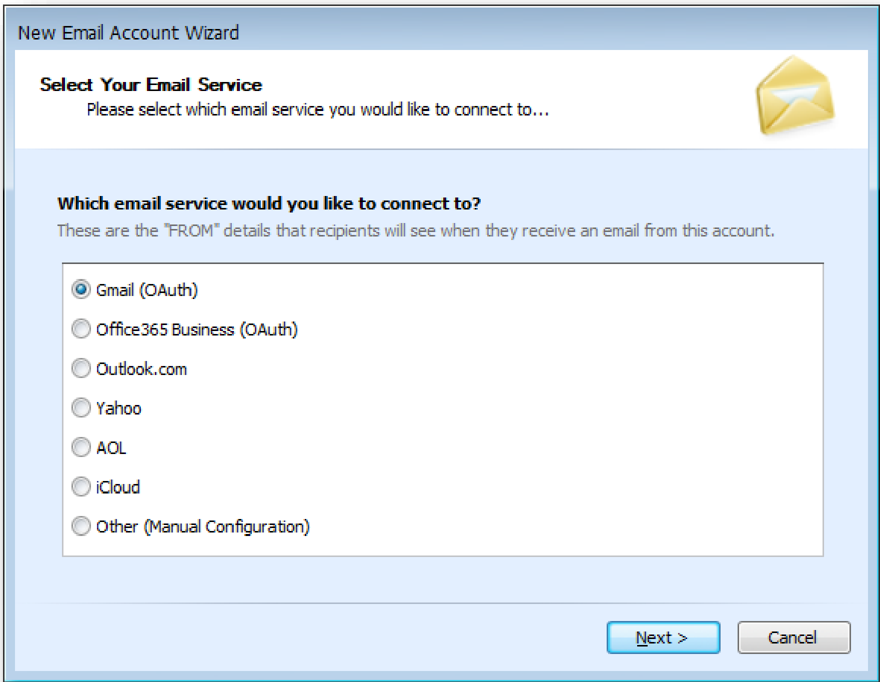
1. Go to the Email Manager
2. Click the **Email Settings** button (top right)
3. Midway down on the Email Settings panel is the option "**Email Account Manager**", click on this

The following window on the next page will appear.



4. On the screen above click the **New** button (bottom left)

An email account wizard will appear. The first time this window is opened, it will take a little while to retrieve the settings from some of the major email providers.



5. From this window you can select Gmail, Outlook.com; Office 365 Business, Yahoo; AOL or iCloud. Once selected, click the **Next** button.

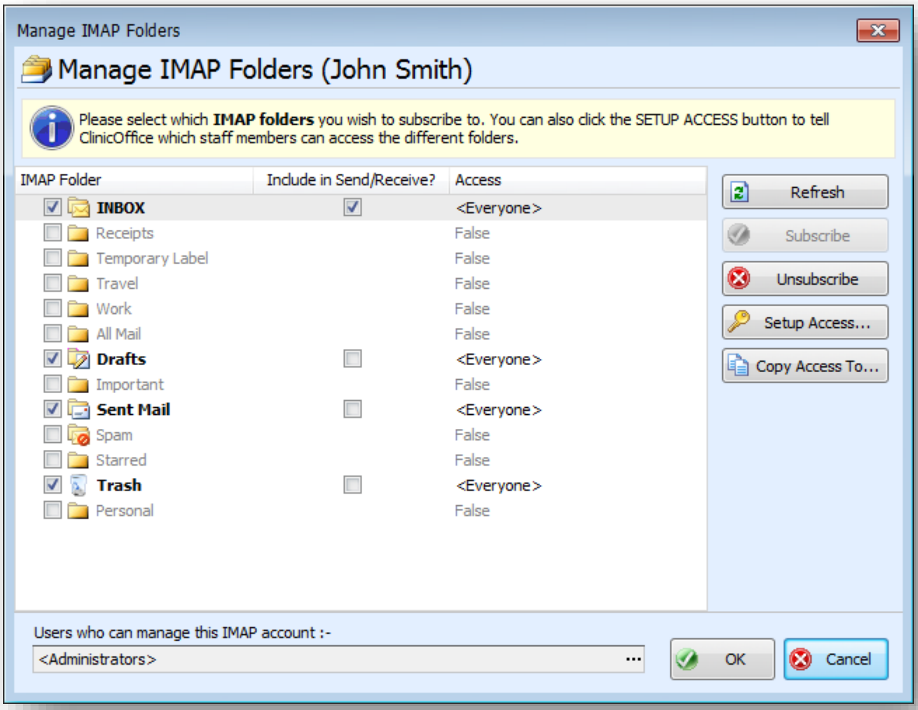
6. You will now be asked to enter a name for your new email account. This is just a name that helps you identify the email account. We recommend choosing a short name. Click **Next** button once you have entered a name. If you selected **Gmail** or **Office365 Business** you will need to click on the button to

sign in to those services and from you will be redirected to a webpage to login to your email account. From there you can proceed to step 9 on these instructions. If you selected one of the other services then proceed to step 7.

7. Enter the Username and Password for your email account

8. You will also be asked for the Sender Name and Sender Email. These will be what the patient sees when you send them an email. Note if you are using an **iCloud** account then please follow the additional instructions given within the yellow box on this setup screen.

9. Once you are finished click the **Finish** button



A new window will appear named "Manage IMAP Folders". From here you can select the folders you wish to synchronise and manage the users that can manage IMAP folders.

10. Select the folders you wish to synchronise by ticking the first checkbox on the left

11. You can tick the "**Include in Send/Receive**" for the folder so that it will automatically check this folder for new emails when ClinicOffice connects to the email server.

12. For each folder select who can access that folder by clicking the **Setup Access...** button and then allotting the staff or team that can have access to it.

13. You can copy the same access from one folder to another by clicking the **Copy Access To...** button and selecting the folders and clicking **OK**.

14. Once you have finished click **OK** on the "Manage IMAP Folders" window and **OK** to the next message

Setting up an Email Account Manually

If you are using a non-predefined email service, then you can set this up manually following the steps below. Note, that if you are using Gmail or Office365 Business service then we strongly recommend that you follow the above previous steps instead.

1. Go to the Email Manager

2. Click the **Email Settings** button (top right)

3. Midway down on the Email Settings panel is the option "**Email Account Manager**", click on this

4. On the screen above click the **New** button (bottom left)

5. Select "**Other (Manual Configuration)**" and click **Next**

6. Enter the name you wish to identify this email account by and click **Finish**

This will take you back to the Email Account Manager screen and will now allow you to enter your details manually.

7. Under the **Incoming Server** tab, select either **IMAP** or **POP**

8. Enter in your server name, security, port, username, and password

9. Click the **Test IMAP Server** or **Test POP Server** button, to see if the connection has been established to the server

10. If you are using IMAP click **Manage IMAP Folders**

11. Select the folders you wish to synchronise by ticking the first checkbox on the left

12. You can tick the "**Include in Send/Receive**" for the folder so that it will automatically check this folder for new emails when ClinicOffice connects to the email server.

13. For each folder select who can access that folder by clicking the **Setup Access…** button and then allotting the staff or team that can have access to it.

14. You can copy the same access from one folder to another by clicking the **Copy Access To…** button and selecting the folders and clicking **OK**.

15. Once you have finished click **OK** on the "Manage IMAP Folders" window and **OK** to the next message

16. Go to the **Outgoing Server** tab

17. Enter in the server name, security and port for the SMTP

18. You can copy the username and password from the "Incoming Server" section by clicking the blue link "**Copy from 'Incoming Server'**"

19. For peace of mind click the **Test SMTP** and if a successful connection has been made to the server it will say that a test email has been sent

20. Enter your Sender Name and Sender Email and if you already have an email signature set up you can select to use this

21. You can mark this as your default email by clicking the **Set as My Default Email Account** button

22. Click the **Save** and then **Close** buttons once done

For a better understanding of what each field does within the Email Account Manager setup screen, please see the tables below.

Email Account Manager	
Email Accounts	
Incoming Server	
IMAP/POP Server Settings	
Server Type	You can select to use either IMAP or POP protocols or the Office365 Business or Gmail service for the incoming server. The difference between them is that IMAP will synchronize all the email contents between ClinicOffice, your email server and any other devices that you check your emails on. So, for example, if you mark a newly downloaded email as read, this will be synchronised to the other devices that use this email. If you send an email, this will also be visible in the sent folder on the other devices. POP or technically POP3 downloads emails from the server to a single computer. Generally, with POP3, once an email is downloaded, it will delete it off from the email server. With ClinicOffice this is not the case unless you set it to. Still, unlike IMAP if you mark an email as read it will not be synchronised across other devices. This is the same when sending emails.

	For Office365 Business or Gmail you can just click to sign into either service and ClinicOffice will automatically link up to either account or will automatically sync. Signing to either of these services will also autofill the outgoing server details as well. Generally, we recommend that you use IMAP, unless you have a Gmail or Office365 Business account.
Server Name	This is your incoming mail server. This will be provided to you by your email provider. It will very often be in a format like this: *pop.example.com or imap.example.com*
Security	Define the security protocol that your email server uses. You can select: “None”, “StartTLS” or “TLS or SSL”. Your email provider will be able to give you this information.
Port	Each security protocol has a port number that it will use to communicate through. If you have the option “**Use default port**” ticked, then it will select the default port number of the security protocol you have selected. Please note that your email server may use a different port to the default port number.
Username	This is the main username that you would use to access your email server. So in many cases, this will be your main email address. If your email server is on a local machine, then this will probably be different.
Password	This is the password you use to access your emails on the email server.
Test IMAP/POP Server	Tests the connection with the IMAP or POP server. If successful ClinicOffice will indicate that the “Connection was Successful”. If it fails a message will indicate why it has. Please remember that failure messages are generated from your email server and then presented in ClinicOffice.
Manage IMAP Folders	Allows you to manage the email folders you wish to synchronise with and who can access these folders.
Email Checking	
Check every	This allows you to specify how often ClinicOffice checks and downloads new messages.
Only check when logged on as	From here you can specify which user accounts will check for your new emails. If you leave it blank ClinicOffice will download your emails, no matter who is logged on. This does not mean that they can check your emails if you have denied them access from viewing your email folders, it just means that when they login ClinicOffice will check for new emails for you.
Only check from this computer	You can specify only one computer that can download your emails. Again, if you do not specify then all computers will check for your emails.
POP Delivery	
This section will only appear if you have selected the POP server type under the Incoming Server section.	
Deliver to Global Inbox	This will put all downloaded messages into the Public Folders’ inbox.
Deliver to Staff Member	This is an alternative to the “Deliver to Global Inbox” option. You can specify which staff member should receive the emails instead.
Leave messages on the server	When you select this option, all messages that you download from your email server will remain on the server.
Delete messages from the server once downloaded	When you select this option, messages that you download from the server are then removed from the email server.
Delete messages from the server after	When you select this option, you can specify to have messages removed from your email server after a set number of days.
Outgoing Server	
Outgoing Server (SMTP)	
Server Name	This is the address of your outgoing server. This will be provided by your email provider. The format of this tends to be smtp.example.com.
Security	Define the security protocol that your email server uses. You can select: “None”, “StartTLS” or “TLS or SSL”. Your email provider will be able to give you this information.
Port	Each security protocol has a port number that it will use to communicate through. If you have the option “**Use default port**” ticked, then it will select the default port number of the security

	protocol you have selected. Please note that your email server may use a different port to the default port number.
Authentication Required	Enables you to enter your email account's username and password. If you have an internal exchange server on the same network as your ClinicOffice, then you may not need to tick this. If you do not, you will need to.
Copy from 'Incoming Server'	For most email accounts the username and password are the same for the outgoing server as it is for the incoming server, so you can click this link to copy the username and password from the "Incoming Server".
Sender Name	This is the name that will appear when the recipient receives an email.
Sender Email	This is the email address that the recipient of an email will see.
Default Signature	Allows you to allocate a default signature to the email account, which will appear when sending a new email, replying to an email, or forwarding an email.
Advanced (IMAP)/(POP)	
This section will only appear if you have selected the IMAP server type under the Incoming Server section.	
Authentication Method	IMAP supports different authentication and security mechanisms. By default, this setting is set to "Auto" which means ClinicOffice will automatically select the most appropriate "Simple Authentication and Security Layer" (SASL) for you. You can, however, change the type SASL used. Please note that not all email servers work with all forms of SASL mechanisms.
Authentication Options	Allows you to select an option for the authentication. By default, this is set to "None". This does NOT mean there is NO authentication enabled, but it means that there is no additional authentication "Options" enabled such as "Use Local Domain As Default".
Security Protocol	This allows you to select the security protocol your server uses i.e. TLS 1.1 or TLS 1.2. If you leave it to TLSAuto, the highest TLS certificate that your email server uses will be selected.
Mail server timeout after	Like any local email client, ClinicOffice will attempt to connect to your email server. If it fails, it will inform you that it cannot connect and why it cannot connect. By default, it will try for 30 seconds with each send and receive attempt. Using this setting you can increase the length of time before ClinicOffice will timeout.
Sync past emails (IMAP ONLY)	This is only for IMAP. With this setting, you can specify how far back in time you wish to store and synchronise emails locally. By default, it is set to store and synchronise emails from 1 month ago.
Suppress upload sent emails to "Sent" folder (IMAP ONLY)	By default, IMAP will synchronise not only incoming emails across all devices accessing the same email server, but it will also synchronise emails sent from ClinicOffice across all devices. By ticking this option, it will prevent sent emails from synchronised.
Reset Downloaded Emails…	This blue link will allow you to re-download emails from the server despite them already having been downloaded in the past by ClinicOffice. This is on the provision that those emails still exist on the email server.
Advanced (SMTP)	
Authentication Method	SMTP, POP or IMAP support different authentication and security mechanisms. By default, this setting is set to "Auto" which means ClinicOffice will automatically select the most appropriate "Simple Authentication and Security Layer" (SASL) for you. You can, however, change the type SASL used. Please note that not all email servers work with all forms of SASL mechanisms.
Authentication Options	Allows you to select an option for the authentication. By default, this is set to "None". This does NOT mean there is NO authentication enabled, but it means that there are no additional authentication "Options" enabled such as "Use Local Domain As Default".
Security Protocol	This allows you to select the security protocol your server uses i.e. TLS 1.1 or TLS 1.2. If you leave it to TLSAuto, the highest TLS certificate that your email server uses will be selected.
Mail server timeout after	Like any local email client, ClinicOffice will attempt to connect to your email server. If it fails, it will inform you that it cannot connect and why it cannot connect. By default, it will try for 30 seconds with each send and receive attempt. Using this setting you can increase the length of time before ClinicOffice will timeout.
Default Outgoing Accounts	
The default email account is	This is the default account for the entire ClinicOffice program and is what is used for clinics and staff members as their default unless they have their own specified default email.

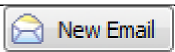
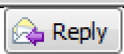
Clinic Defaults	This allows you to define a specific email that a clinic would use. This overrides the main default email account for the purpose of contact rules such as appointment reminders.
Staff Defaults	When set, a staff member will have their own custom default email. This overrides the main default email account when the staff member is sending out emails from the system, such as emailing a patient.
Other Email Settings	
New	Allows you to add an email account to the system.
Delete	Deletes an email account off from the system.
Set as My Default Email Account	To use this, select an email account and click this button. This will set your personal staff email to use this email account as your default.
Disable this account	This will disable the current email account within ClinicOffice, preventing you from receiving/sending any emails.
Save	Saves changes you have made to the email account setting page.
Show progress when send/receiving emails	When you do a send/receive for emails a small progress bar will appear in the bottom right of ClinicOffice. If you un-tick this option then this progress bar no longer appears.
Configure proxy server	This is only to be used if have a proxy server on your local network.

On the left-hand side of the Email Manager are the email folders, this is broken down into sections. The main categories are **Online Accounts** and **Offline Folders**. Online accounts are for IMAP accounts and Offline Folders are for POP accounts are kept. The only Online folders you will see will be the ones you have been granted access to.

Under the offline folders you will see your user folders and the public folders. Each section has a Drafts folder, Deleted folder, Inbox folder, Junk folder, Outbox folder and Sent folder. You will also see any offline folders that have been shared with you. Offline folders are always present even if you do not have a POP account. You can however minimise these within the folder tree so that they are not a nuisance or in the way.

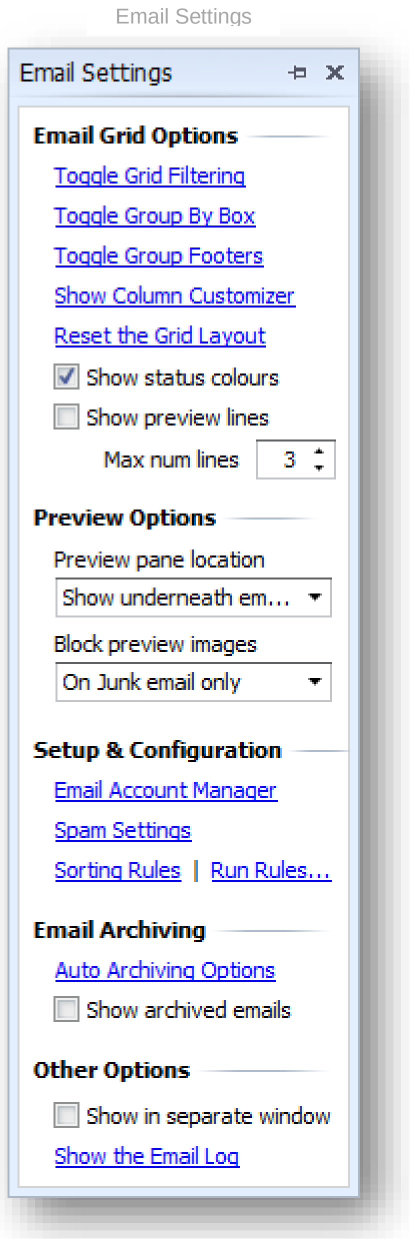
You can select to add new subfolders to both online and offline folders by right-clicking on any of the folders and selecting **New Folder**. If you do create a new subfolder for an online account, then this folder will become present on the email server as well. You can equally rename and delete subfolders by again right-clicking on them.

At the top of the Email Manager there a several buttons. These carry out the following functionality:

	This will send and receive all emails for all email accounts present in ClinicOffice. Left clicking on the right-hand section of the button (arrow pointing down) will give you the options: Check My Accounts, Check All Accounts and Send Pending Emails.
	This will create a new email.
	This will reply to the sender of the current email that you have selected.
	This will reply to all email present on the current email, i.e. sender and other recipients of the same email.
	This will forward the current email you have selected.
	Marks the email(s) you have selected as read.
	Marks the selected email(s) as spam and send them straight to the spam folder.
	Deletes the selected email(s)
	This will allow for you to perform a search on the emails.
	This will take you to the email settings. See “Email Settings” for more information.

Email Settings

The email settings are accessible via the Email Settings button or the Email Settings tab. The Email Settings is broken down into 5 major sections: **Email Grid Options**, **Preview Options**, **Setup & Configuration, Email Archiving** and **Other Options**.



Email Grid Options

Toggle Grid Filtering	This will enable you to place a filter on the email grid.
Toggle Group by Box	Allows for an additional row to appear above the grid, allowing you to drag a column header into this area and to group the grid by these columns values.
Toggle Group Footers	This will display/hide the group footer. In order to use this it will require that the grid is being grouped.
Show Column Customizer	This displays a new window which holds any hidden fields for the grid. You can remove columns off from the grid and place them into the Customization window. You can also take columns out of the hidden section and add them to the grid.
Reset the Grid Layout	This resets the email grid layout back to its original format.
Show status colours	If you have assigned colours to the patient/contact's statuses these will show when this option is ticked.
Show preview lines	Gives a preview of the first few lines of an email. The previewed is displayed on the grid. You can change the maximum number of preview lines.

See the section "Working with ClinicOffice Grids" for more information on the Grid Options functionality.

Preview Options

This allows you to change the way the Email Manager displays the emails. This is broken into two settings: **Preview pane location** and **Block preview images**.

The preview panel will allow you to preview an email without the need to physically open it. Just select the email by a single left click and it will appear in the preview panel.

With the **Preview pane location** you can select where you wish the preview panel to be present. By default the preview panel is set to appear to "Show on the right hand side" of the email grid. You set to "Show underneath emails" or "Don't Show"

The preview panel should not be confused with the "Show preview lines" on the **Email Grid Options**. The "Show preview lines" will show a text only preview of the email and this is displayed on the grid and not in the preview panel. The preview panel is capable of displaying emails that are in html format.

By default images will be displayed when viewing an email in the preview panel. You can however choose to have this blocked by using the **Block preview images**. You could select to block "On All emails" or "On Junk email only".

Setup and Configuration

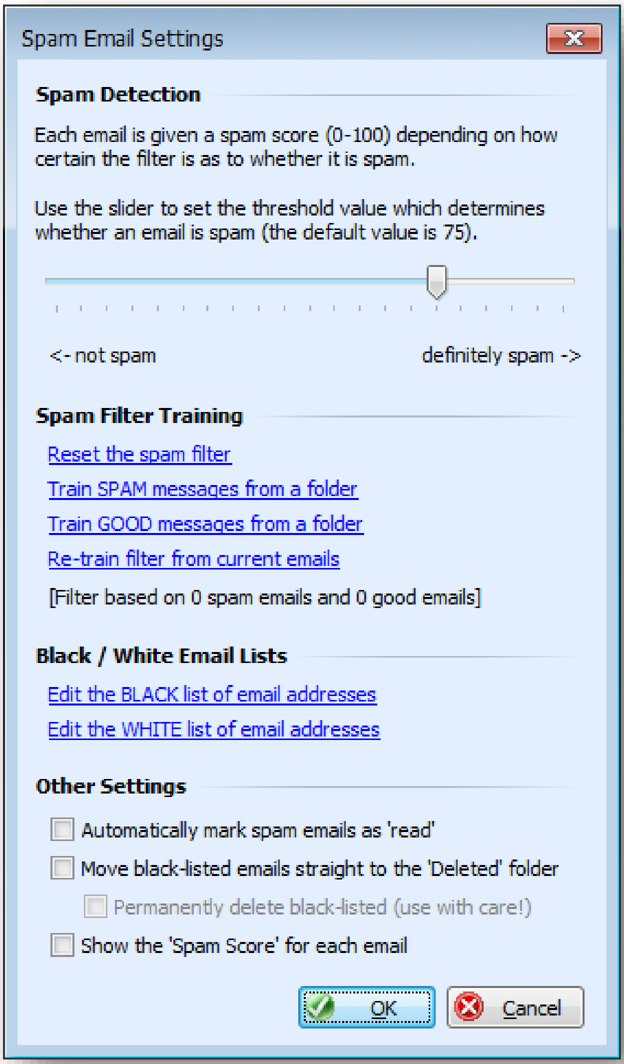
This area consists of 4 buttons: **Email Account Manager**, **Spam Email Settings**, **Sorting Rules and Run Rules**. These 3 sections are considered on the preceding and following pages.

Email Archiving

This area will allow you to set up an automatic archiving process. You can specify under the Options how often you want the archiving process to run and how old the emails need to be before they are archived, Archived emails will still be present in ClinicOffice but will be hidden, unless the setting "Show Archived Emails" is ticked. There is also an option to delete emails after a period of time although this is unselected by default as it will permanently remove the emails from the ClinicOffice database, rather than just hiding them.

Spam Email Settings

Spam Email Options

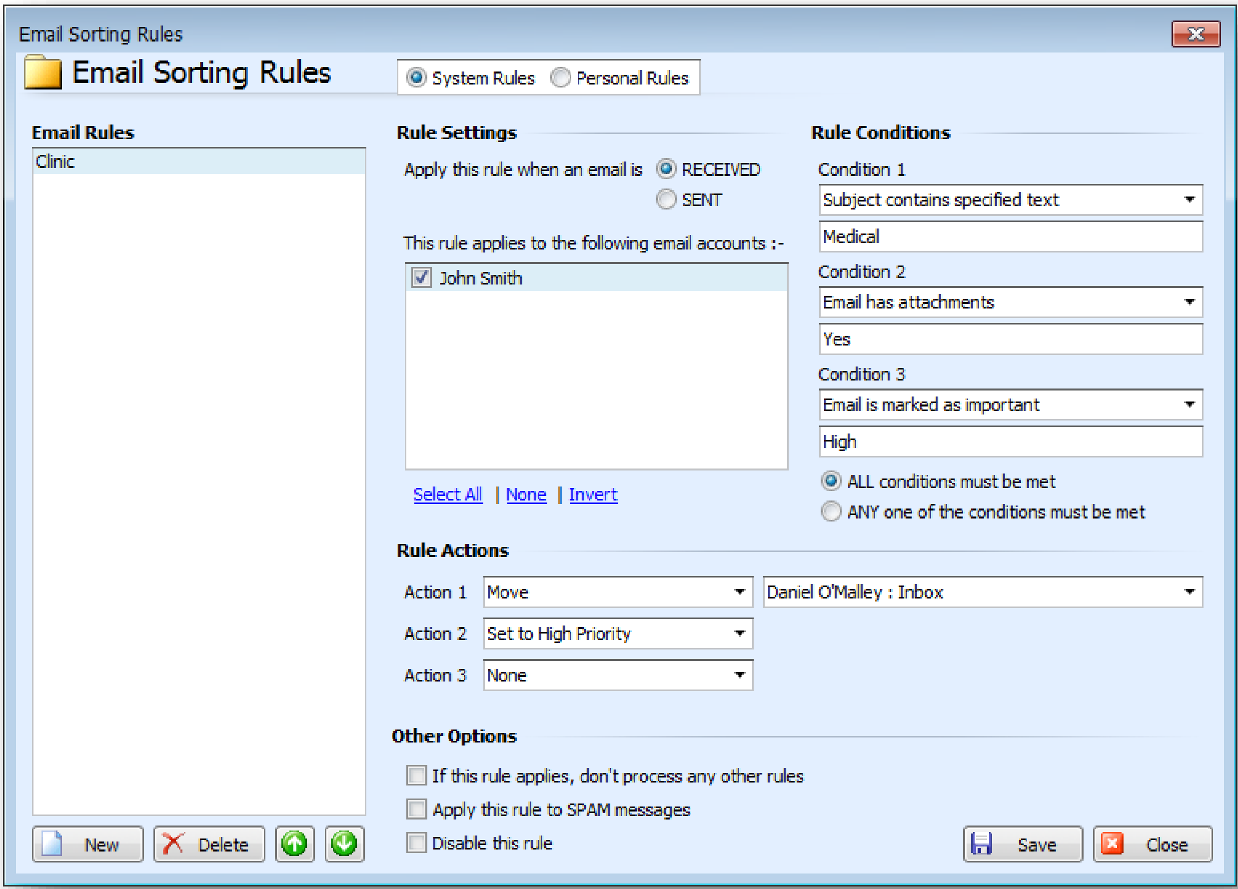


ClinicOffice has an inbuilt spam filter which over time learns which emails are spam and which emails can be trusted. This is achieved when you mark an email as spam. The system detects, makes note of the format and context of the email and after a few similar emails being marked as spam, all future emails of this nature will be instantly marked as spam.

Spam Detection	
Your ClinicOffice will give you a spam rating on each email that it downloads based on your spam filter. From here you can mark at which value an email should be considered to be spam. So for example if you set it to 75 then emails that come in and have a spam score of 75 or higher will be sent to the Junk folder.	
Spam filter Training	
Reset the spam filter	This undoes all of the previous training that your spam filter has received.
Train SPAM messages from a folder	You can train your spam filter by selecting a folder with saved spam emails. Be careful because if you selected a folder with genuine emails then it will register such emails as spam on future occasions.
Train GOOD messages from a folder	By clicking on this option and selecting a folder full of genuine emails you will add these types of emails to your trusted list.
Re-train filter from current emails	If you wish to reset all of the rule on your spam filter then you will click this option..
Black / White Email Lists	

Edit the BLACK list of email addresses	When you click on this link a new window will appear displaying a list of emails and domains that have been blacklisted. You can also add to this list via this window by clicking the **Add** button.
Edit the WHITE list of email addresses	This works like the BLACK list but instead provides you with a list of emails that have been marked as trusted.
Other Settings	
Automatically mark spam emails as 'read'	Any emails that have been identified as being spam will be marked as read if you have this option ticked.
Move black-listed emails straight in the 'Deleted' folder	When this option is ticked any emails that are on the black list will bypass the spam folder and go straight into the deleted folder.
Permanently delete black-listed.	If this option is ticked all black listed emails will be permanently deleted straight away rather than going to the Junk or Deleted folders. Please use with discretion.
Show the 'Spam-Score' for each email	This will display an extra column in the Email Manager. This is the Spam Score Column and it will display each email's spam rating.

Email Sorting Rules



There is System Rules and Personal Rules. The system rule will allow you to create a rule affecting all email accounts and a personal rule will only create a rule for your own user email account.

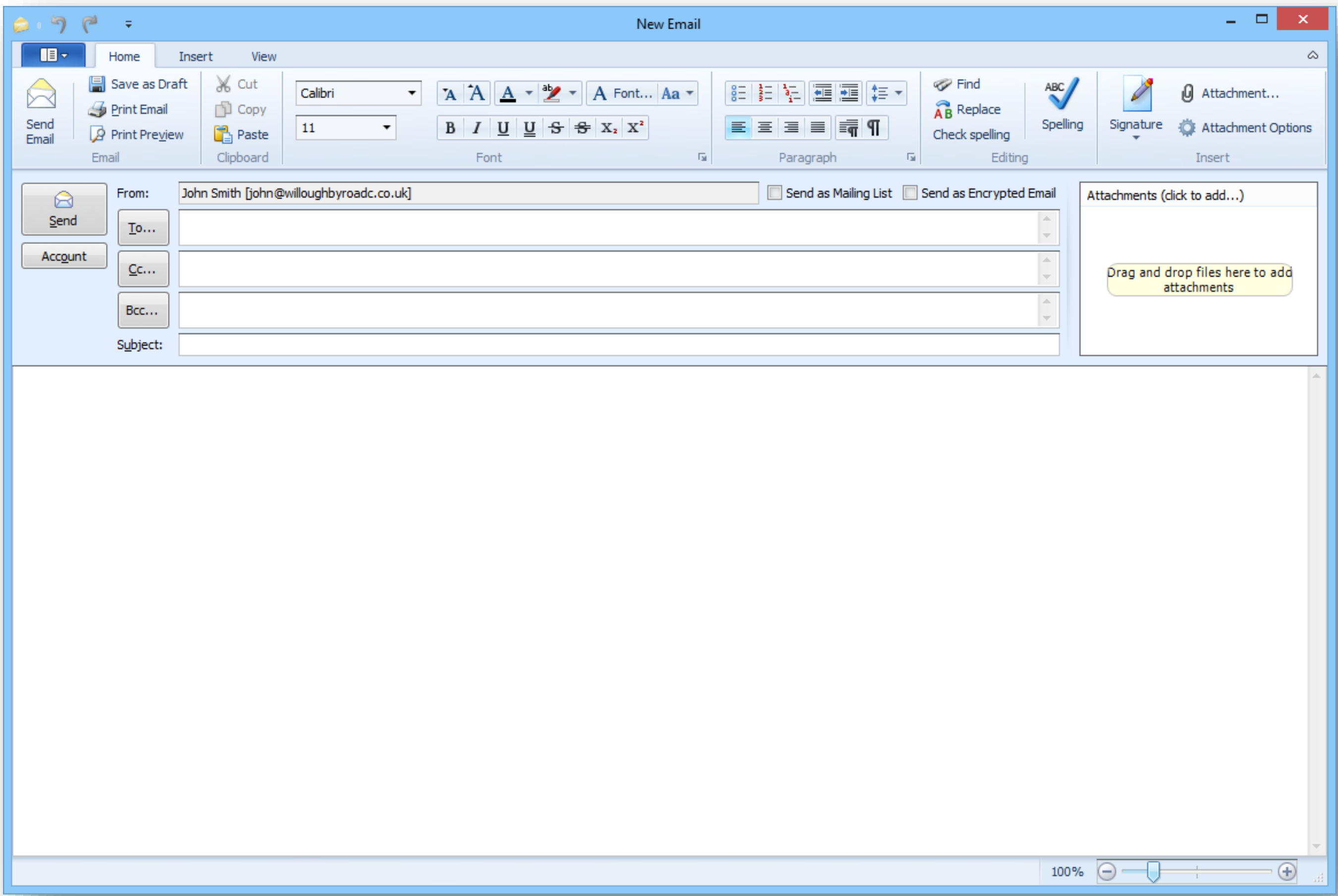
Email Rules	
This is where your list of rules will be displayed. From here you can select a rule to edit it, create a new rule or choose to delete a rule.	
Rule Settings	
Apply this rule when an email is Received/Sent	This allows you to create a rule either to be run on emails that are being received (incoming emails) or you can select it to run on emails being sent (outgoing emails).

This rule applies to the following email accounts	This only applies for system rules. This allows you to select which emails accounts you wish the rule to apply to.
Rule Conditions	
Condition 1- 3	You can specify up to 3 conditions for your email sorting rule. You can specify to filter on text that is present in the “From”, “To”, “Cc”, “Bcc”, ”Subject” fields or the main body of text in an email. Other types of conditions that can be set are: to specify the size of an email, if the email has an attachment or if an email has been marked as important.
All conditions must be met/ ANY one of the conditions must be met.	By selecting “All conditions must be met” every email will have to match up to all conditions before the rule is applied to it. By selecting “ANY one of the conditions must be met” will mean that if any one of the conditions are met by the email the rule will be applied to it.
Rule Actions	
Action 1-3	This is where you can select up to 3 actions for this rule.
Other Options	
If this rule applies, don’t process any other rules	If you have this option ticked then once this rule has been applied to an email then no other rule will affect it.
Apply this rule to SPAM messages	Usually a rule will not be applied to an email marked as spam however if this option is ticked it will.
Disable this rule	If this option is ticked then the rule will not run unless you un-tick it.

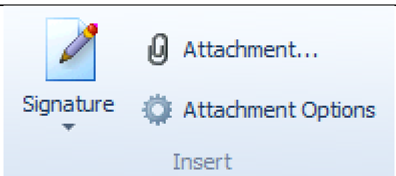
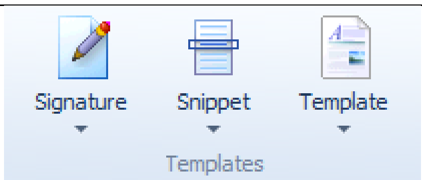
Email Editor

When you go to reply to an email or to create a new email the email editor window will open.

Email Editor



The Email Editor works in a very similar fashion to the document template editor (For more information please see the section “Document Templates”). The features that are different are shown on the next page.

<table>
<tr><td colspan="2">Home Tab</td></tr>
<tr><td>
</td><td>Your email will be sent to your specified recipients when you click on this button.</td></tr>
<tr><td>
</td><td>This will save the email to your Draft folder. You can then access your draft later on in a similar fashion to other emails.</td></tr>
<tr><td>
</td><td>Signature
From here you can select your email signature to be used on the email. You can also manage and create new signatures by selecting Manage Signatures... at the bottom of the drop down menu.
Attachment
This will allow you to locate a file from your local machine in order to attach it to an email.
Attachment Options
Provides the compression options for images or PDF documents that are attached to an email.</td></tr>
<tr><td colspan="2">Insert Tab</td></tr>
<tr><td>
</td><td>Signature
This works in an identical manner to the Signature button on the Home tab.
Snippet
This will allow you to insert pre-defined text. You can also manage and create your snippets by selecting Manage Snippets... at the bottom of the drop down menu.
Template
From here you can select to use an template. You can also manage and create your email templates by selecting Manage Templates... at the bottom of the drop down menu.</td></tr>
<tr><td colspan="2">View Tab</td></tr>
<tr><td>
</td><td>When clicked on the ‘BCC’ (Blind Carbon Copy) field will appear below the ‘CC’ field. This field will allow you to insert multiple recipient’s email addresses like the ‘To’ and ‘CC’ field. Unlike the ‘To’ and ‘CC’ field though the recipient will not be able to see the other recipient’s email addresses that have been placed in the ‘BCC’ field.</td></tr>
</table>

Assigning Default Signatures

Like other email client programs the Email Manager within ClinicOffice will enable you to assign a default signature to each email account being used on the system. The steps below will explain how to do this.

- Go to the Email Manager within ClinicOffice
- Click the **New Email** button
- Click the **Signature** button and on the drop down menu select **Manage Signatures**
- Click the **New** button
- Enter a name and click **OK**
- On the right hand side is a large text field where you can type in your signature
- You can insert an image by clicking the Inline Picture button ( ), locate your local image and click **Open**
- You can also insert a link to your website by clicking the **Hyperlink** button ( )

The signature may look something like the example below.

- If you want the signature to automatically appear when you click to create a new email or are replying to an email, tick the bottom two checkboxes
- Click the **Save** button once finished

All that remains is to assign this signature to an email account. These next set of steps outline how to do this.

- While still in the Email Manager click the **Email Settings** button
- Click the blue link **Email Account Manager**
- Select your email account and go to the **Outgoing Server** tab
- Select your signature from the drop down menu on the **Default Signature** field
- Click **Save and Close**

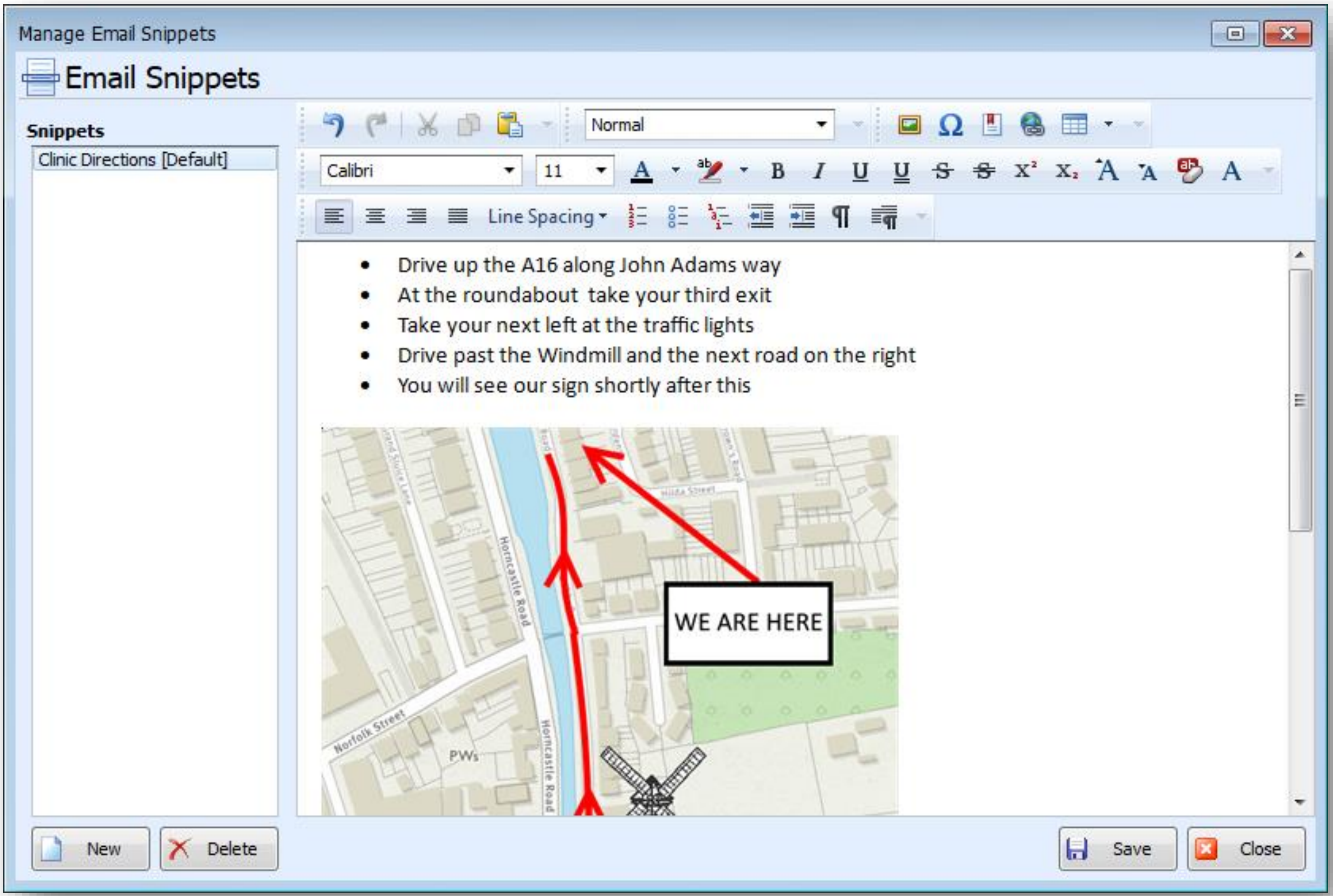
Now when you go to send out an email via this email account your signature will appear at the bottom of the email.

Creating Emails Snippets

A snippet is not the same as an email template. A snippet will allow for you to insert predefined text within the body of your email without replacing the entire contents of what you currently have in the email. For example, maybe it is a set of step by step instructions, such as how to locate the clinic or get into the building. Snippets are particularly useful if you need to reply to someone but want to keep the contents of their email still present. The steps below explain how you can create a snippet.

- Go to the Email Manager in ClinicOffice
- Click the **New Email** button
- Go to the **Insert** menu (tab) at the top of the email screen
- Click on the **Snippet** button and select **Manage Snippets**
- On the next screen click the **New** button
- Enter in a name and click **OK**
- On the right hand side is large text field where you can type in your text
- You can insert an image by clicking the **Inline Picture** button ( ), locate your local image and click **Open**
- You can select one of the three buttons to insert bullet points into the text

An example of what an email snippet could look like is show below.



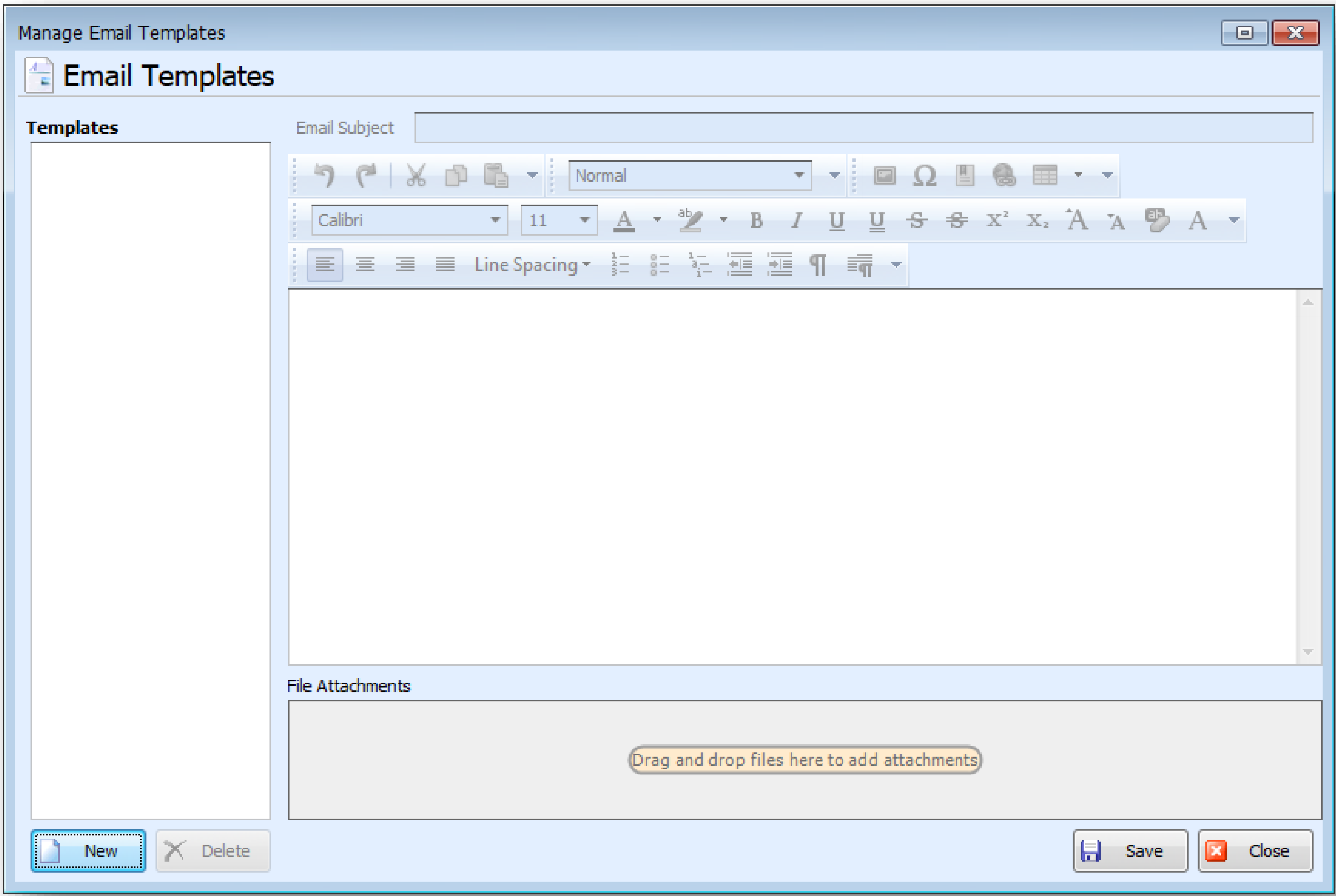
- When you are finished with creating your snippet, click the **Save** and then **Close** button

You can now insert the snippet into the line of the email by clicking on the location you wish to insert the text or images, go to the **Insert** menu, click **Snippets** and select the name of your newly created snippet.

Creating Email Templates

You would use an email template when you wish to modify everything within an email. So for example a newsletter could be a template. As the template replaces the email subject, the email's text and any attachments it is best to use an email template for new emails as oppose to replying to an email or forwarding an email everything. If you prefer to insert predefined text or images within the current email, please see the topic "Creating Email Snippets". The steps below explain how you can create a new template.

- Go to the Email Manager in ClinicOffice
- Click the **New Email** button
- Go to the **Insert** menu (tab) at the top of the email screen
- Click on the **Template** button and select **Manage Template** [the screen below will appear]



- On the next screen click the **New** button
- Enter in a name and click **OK**
- On the right-hand side at the top of the screen you can enter the **Email Subject**
- Below the tools is the main email body where you can enter the contents of the email
- Like the snippets you can select to add images, hyperlinks, tables and adjust the size and fonts of the text
- To add an attachment, right-click somewhere in the bottom **File Attachments** field and select **Add**
- Locate the file you wish to attach and click **Open**
- Once finished click the **Save** and then **Close** buttons

You can now use the template by opening a new email, go to the **Insert** menu, click **Template** and select the name of your newly created template.

Sending Encrypted Emails

With the advent of the General Data Protection Regulation (GDPR), it has become paramount that emails containing personal and sensitive data are encrypted and secured so that unwanted individuals do not gain access to such information. ClinicOffice supports two methods to keep your emails secure.

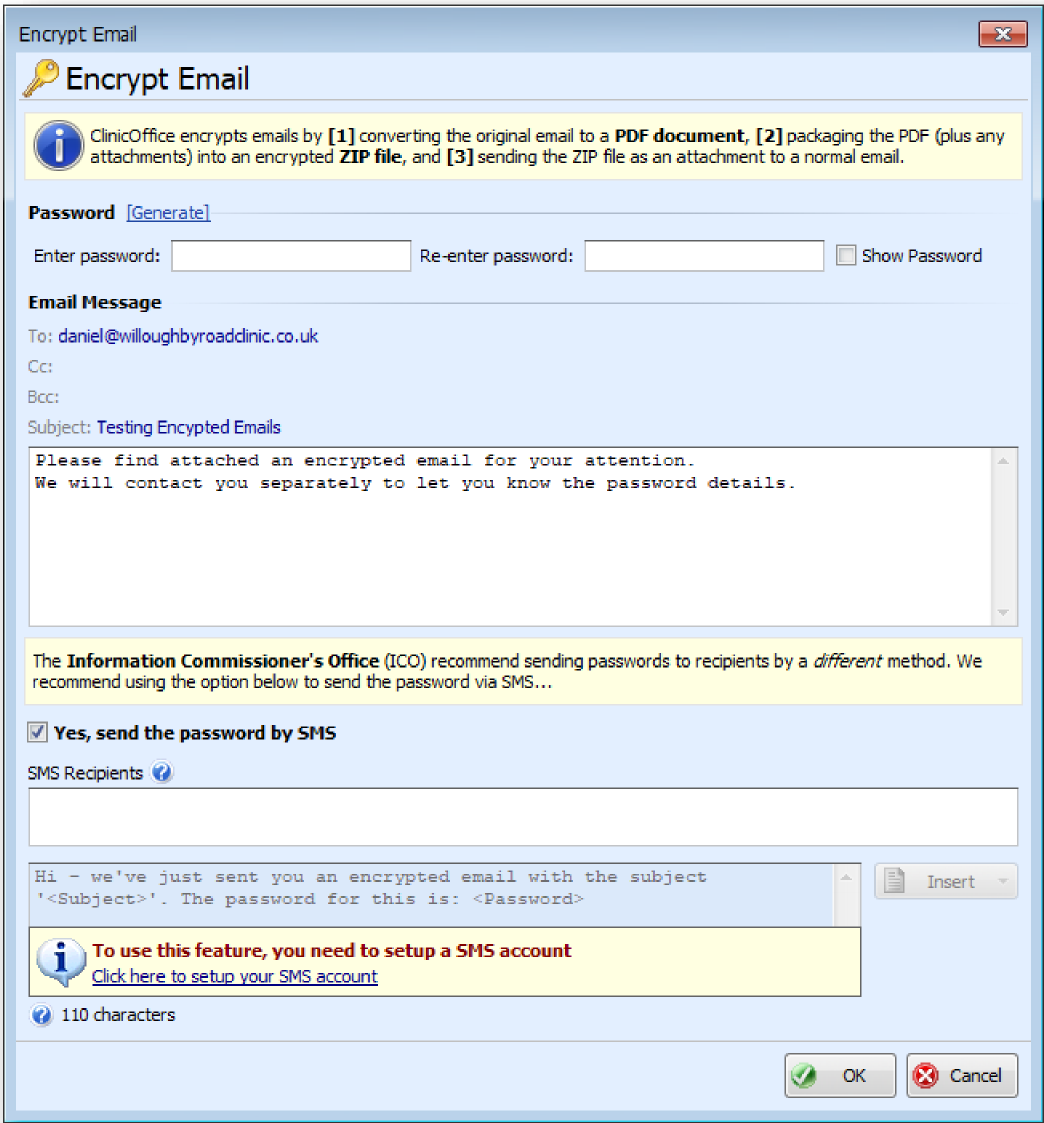
Method 1

The first method is by making sure that both your Incoming Server and Outgoing Server use either StartTLS or TLS/SSL as their security protocol. Your email service provider should support at least one of these options. There are slight differences between the two and how your emails are encoded, but the net result is that both will secure and encrypt the contents of the email being sent from ClinicOffice to your intended recipient. This will prevent anyone who is monitoring your network/internet traffic from reading the contents of the email.

Method 2

The first method is essential but will not cover you if you accidentally send the confidential email to the wrong person. This is where this second method comes into play by encrypting the email's contents and its attachments in an additional manor. The steps below will explain how to do this.

- Open up a new email
- Insert in the recipient's email address, email subject, the email's contents and any attachments
- Just right of the '**From**' field tick the option **Send as Encrypted Email**
- Click the **Send** button and the following window will appear



You can select to either generate a password by clicking the "Generate" blue link or enter in a password yourself. Please bear in mind that the original contents of the email will not be displayed to the recipient because it is now encrypted, so you will have to enter in the purpose of the email and explain that the contents of the original email have been encrypted. By default, there already will be something filled in for this but you can edit the text to suit your needs.

When sending an encrypted email the recipient will need to know the password in order to access the encrypted contents. It is strongly recommended that you do this by another means such as calling the recipient or sending an SMS or even to email the recipient on another email address with the password. The reason is that it defeats the objective of encrypting the email and then sending the password in the same email because if the email was received by the wrong person then they will be able to unlock the sensitive information inside. So by doing this, it will be only the correct recipient that will be able to unlock the encrypted contents. The Encrypt Email screen already has an option to send an SMS to the recipient but you will need an SMS account with us in order to do this. The default SMS message already includes the merge field for the password that is merged in once the message is sent.

Once you are happy with everything on the Encrypt Email screen click **OK** and the email will be sent, along with the SMS if you have selected to send this as well.

Email Archiving

If you are using a POP3 server for your emails then you will find that with time the number of emails increases the load time for the email. To improve performance you can archive old emails. To do this you can set up the auto archiving by clicking on the link "**Auto Archiving Options**" under the Email Settings. From the options window you can specify how often the auto archiving should be run, how old an email should be before it is archived and also an option to permanently delete emails after a set number of months if you want to delete them permanently from the database.

Once an email has been archived you can still view it by ticking the option "**Show archived emails**" (also under the Email Settings).

Other Options

The Email Manager screen can be displayed in its own window, separate from the rest of ClinicOffice. To open the Email Manager in a separate window you need to tick the option "**Show in separate window**" which is towards the bottom of the Email Settings, log off and back on again and the next time you click on the Email Manager button it will open in its own window allowing you to view other screens such as the Diary at the same time.

From the other options you can also view the Email Log by clicking on the **Show the Email Log** link. This will open a new window which will provide you with details of emails sent and received, along with any issues that were encountered when trying to send an email.

Voice Over IP Setup

VOIP Setup

ClinicOffice can be setup to integrate itself with a VOIP service. The two services that it can integrate with are either Birchills VOIP or Skype. To use the Birchills VOIP service you need to setup an account with them and enter those details into ClinicOffice. If you have Skype already installed then ClinicOffice can use this to make outgoing calls with.

You can access the VOIP settings by clicking on the lower half of the **VOIP Calls** button on the **Home** menu and selecting **Configure VOIP Settings**. The window to the right will now appear.

You can either setup your Birchills Account or enter your Birchill account details by clicking the **Configure my Birchills Account** blue link. When you do, it will take you to the Birchills VOIP Account Setup screen. If you have not got a Birchills account you can click the **More Information** button, which will take you to a page on our website which will contain information on how to setup an account. If you already have an account you can enter your username and password in the perspective fields. You can click the **Test Connection** button when you have done that to see if your account details work. You can click the **Go Back (VOIP Setup)** link to go back to the main VOIP Setup page.

A bit further down on the VOIP Setup screen are three options. Once you have configured your Birchills VOIP account you can select "**Use my Birchills VOIP account**". This means any calls received through to your Birchills VOIP service will be displayed in a small pop-up window in ClinicOffice. If the number that is coming through matches one of your patient or contact records then their name will also appear on the pop-up window. You can also make outgoing calls, which will be mentioned later on and view a full history of your calls you have made through the service.

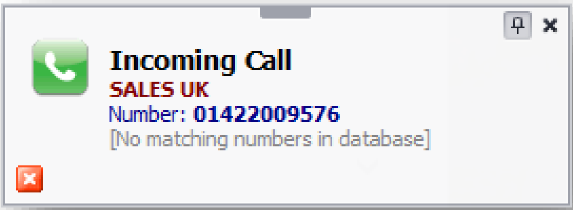
If you do not wish to setup a Birchills account you can use Skype instead by selecting "**Use Skype (if available)**". In order to use this option you require Skype to be installed on your computer and 1-click dialling enabled. Please note that Skype does not support incoming call notifications, however you still can make outgoing calls via ClinicOffice.

If you do not wish to use either service, then you can select **Disable VOIP and hide it from the user interface**.

Please note that these settings are on a per computer basis and will need to be entered on each machine you wish to use the VOIP service on.

Receiving Incoming Calls

Incoming Call Popup



If you have ClinicOffice setup with a Birchills VOIP account, then whenever you receive a call ClinicOffice will display a small popup towards the bottom right of your screen; just like the image to the right.

Once the phone call has been answered the popup will remain on your screen for several more seconds and then will fade out. If you wish for the popup to remain on your screen then you can click the pin icon towards the top right. This will remain on the screen until you close the popup.

As mentioned earlier on, if the telephone number that is calling is stored within a patient's or contact's record then their name will appear on the popup message. If you right click on the popup you can select their name from the menu and this will open their record. If the telephone number does not match any records then you can add it to a record by right clicking on the popup and selecting **Add to Record**. When you do this you will be offered to add the number to either the person's telephone or mobile number. Alternatively you can copy the number to a clipboard by selecting **Copy to Clipboard**.

Making Outgoing Calls

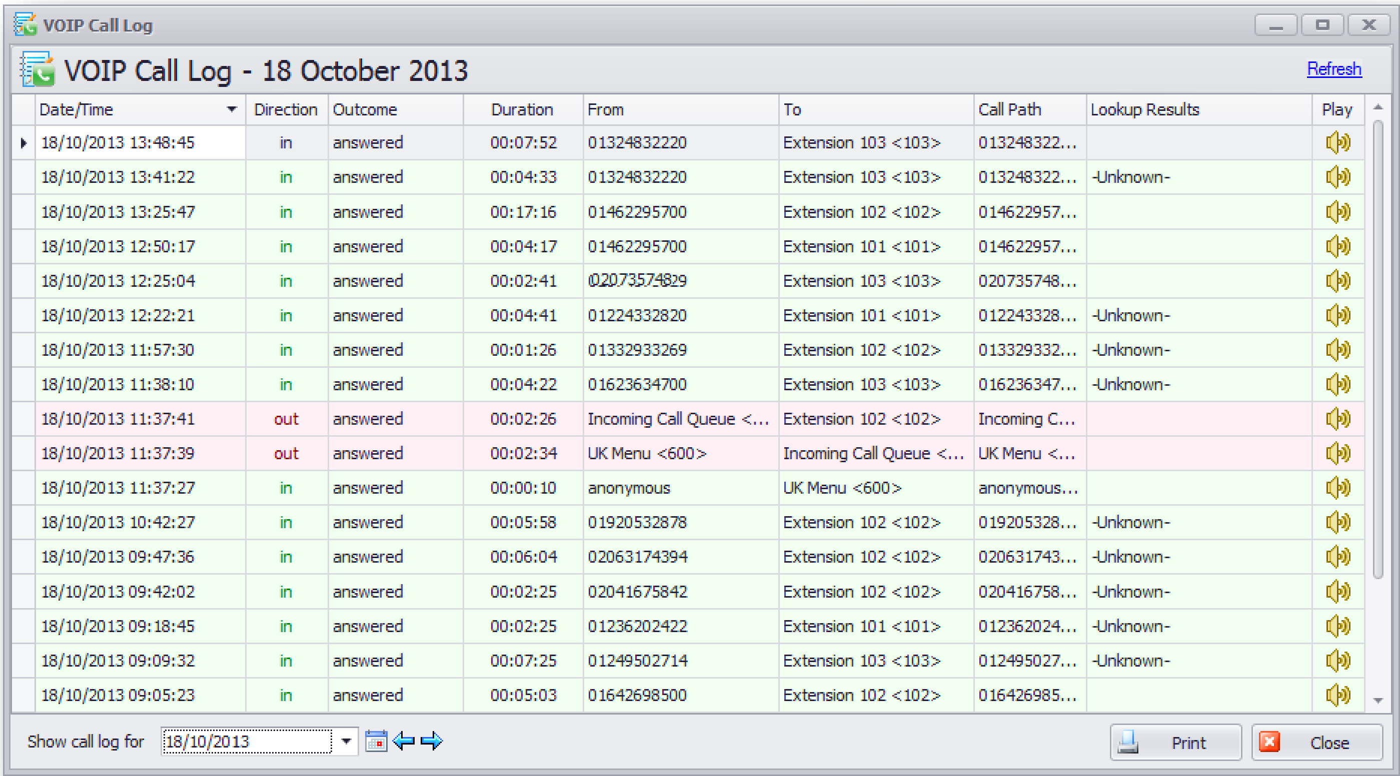
With both Birchills VOIP and Skype you can make outgoing calls. There are a couple of ways to do this. The first way is by clicking on the lower half of the main **VOIP Calls** button and selecting **Make a Call**; a small Call Number window will appear. Just enter in the number you wish to call and click the **OK** button. If you are using Birchills VOIP your phone will begin to ring, simply pick your phone up and it will dial out to that number. If you are using Sykpe this will then launch the Skype program and will begin to dial your number.

The second way to make an outgoing call is to open either the patient's or contact's record and to click on the green phone icon ( ) which is present on the Telephone, Work Tel or Mobile fields. This will then dial the number present in that field.

If you're using Birchills VOIP you need to make sure that you have the correct extension number selected for your phone. If your phone is extension 105 then you need to set this in ClinicOffice. You can do this by either selecting your extension when you login to ClinicOffice (requires Birchills VOIP to be setup) or you can do so by clicking on the lower half of the main **VOIP Calls** button and selecting **Select your Extension**. From here you will be able to select your phone extension and click **OK**. If you do not select the correct extension when you go to make an outgoing call the number will dial through to the wrong phone.

VOIP Call logs

With the Birchills VOIP ClinicOffice can connect to the service and display a list of your incoming and outgoing calls that you have taken or made within a particular day. You can access this screen by clicking on the lower half of the **VOIP Calls** button on the Home menu and selecting **Show Call Log**. The screen below will appear.



Date/Time	Direction	Outcome	Duration	From	To	Call Path	Lookup Results	Play
18/10/2013 13:48:45	in	answered	00:07:52	01324832220	Extension 103 <103>	013248322…		
18/10/2013 13:41:22	in	answered	00:04:33	01324832220	Extension 103 <103>	013248322…	-Unknown-	
18/10/2013 13:25:47	in	answered	00:17:16	01462295700	Extension 102 <102>	014622957…		
18/10/2013 12:50:17	in	answered	00:04:17	01462295700	Extension 101 <101>	014622957…		
18/10/2013 12:25:04	in	answered	00:02:41	02073574829	Extension 103 <103>	020735748…		
18/10/2013 12:22:21	in	answered	00:04:41	01224332820	Extension 101 <101>	012243328…	-Unknown-	
18/10/2013 11:57:30	in	answered	00:01:26	01332933269	Extension 102 <102>	013329332…	-Unknown-	
18/10/2013 11:38:10	in	answered	00:04:22	01623634700	Extension 103 <103>	016236347…	-Unknown-	
18/10/2013 11:37:41	out	answered	00:02:26	Incoming Call Queue <…	Extension 102 <102>	Incoming C…		
18/10/2013 11:37:39	out	answered	00:02:34	UK Menu <600>	Incoming Call Queue <…	UK Menu <…		
18/10/2013 11:37:27	in	answered	00:00:10	anonymous	UK Menu <600>	anonymous…		
18/10/2013 10:42:27	in	answered	00:05:58	01920532878	Extension 102 <102>	019205328…	-Unknown-	
18/10/2013 09:47:36	in	answered	00:06:04	02063174394	Extension 102 <102>	020631743…	-Unknown-	
18/10/2013 09:42:02	in	answered	00:02:25	02041675842	Extension 102 <102>	020416758…	-Unknown-	
18/10/2013 09:18:45	in	answered	00:02:25	01236202422	Extension 101 <101>	012362024…	-Unknown-	
18/10/2013 09:09:32	in	answered	00:07:25	01249502714	Extension 103 <103>	012495027…	-Unknown-	
18/10/2013 09:05:23	in	answered	00:05:03	01642698500	Extension 102 <102>	016426985…		

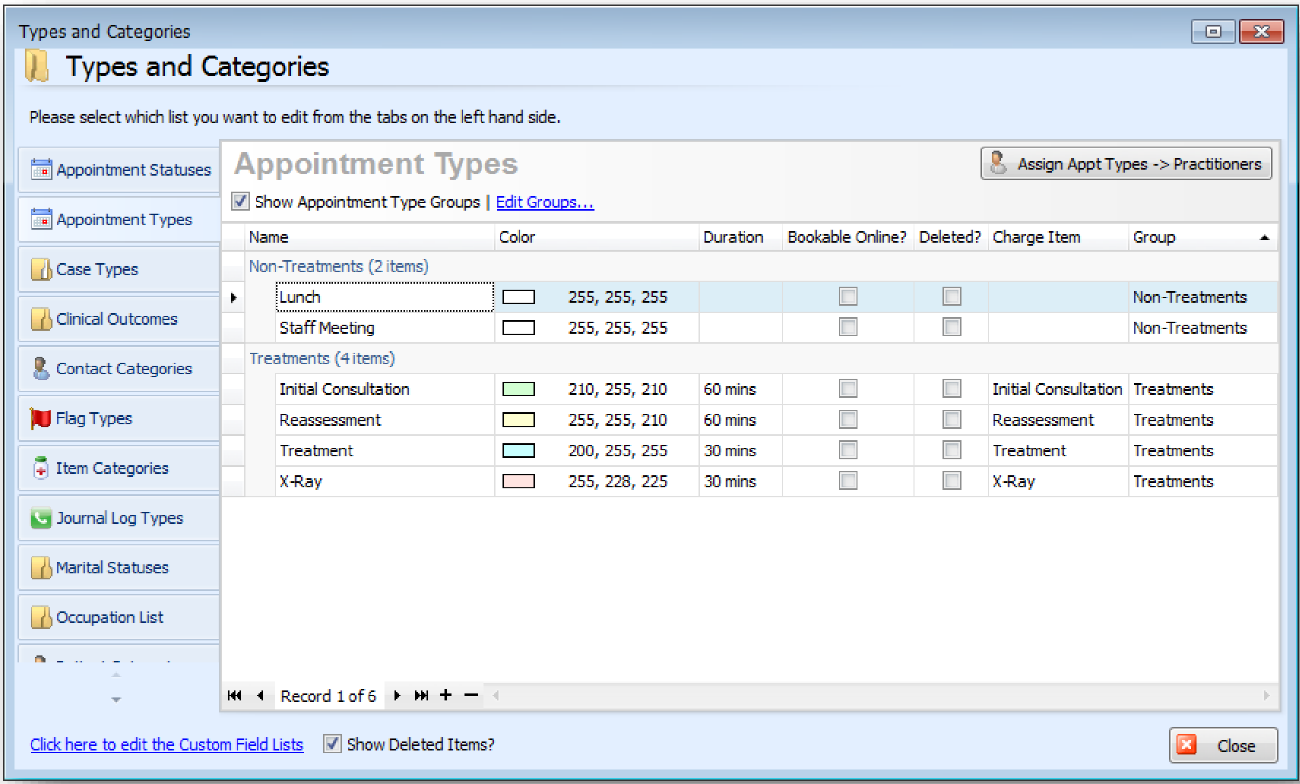
By default the grid will show you the calls that have been processed for today and it sorts the calls by time order. You can change this by clicking on the "**Show call log for**" field and select another date. Alternatively you can select a date by clicking on the calendar icon ( ) or the next/previous ( ) day icons. Under the column "Lookup Results" a patient's or contact's name will appear if the number for the telephone call is stored in their record. You can open their record by right clicking on the row and selecting their name. If the number is not recognised you can instead right click and select **Add to Record** if you know that the number belongs to a patient or contact. On the far right hand side is a Play column. By clicking on a play icon you can listen to the relevant telephone conversation.

Working with Types and Categories

ClinicOffice allows you to define types and categories for records.

To see a list of all the available types and categories in ClinicOffice v5, go to the **View** menu and click the **Types and Categories** button. You should see the following:-

Types and Categories Menu

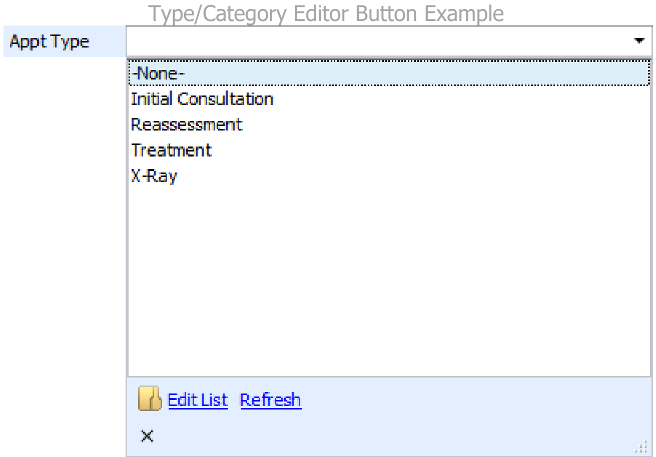


As you click on one of the tabs on the left hand side of the window all the available options will appear on the right side of the screen. Most of the types/categories simply contain a list of values. Take a look at the Occupation List for example.

To edit an entry in the list, simply double-click on it, alter the text and press **Enter** to save the change. You can obviously create a **New** entry or **Delete** an existing one by right-clicking and clicking **New Record** or **Delete Record**. Alternatively you can click the + or − buttons.

You probably have also noticed that the field edit boxes which required you to select an entry from a type or category list always has a little button at the bottom which is the edit category list icon.
Take the bottom part of the Appointment Editor for example:-

Type/Category Editor Button Example

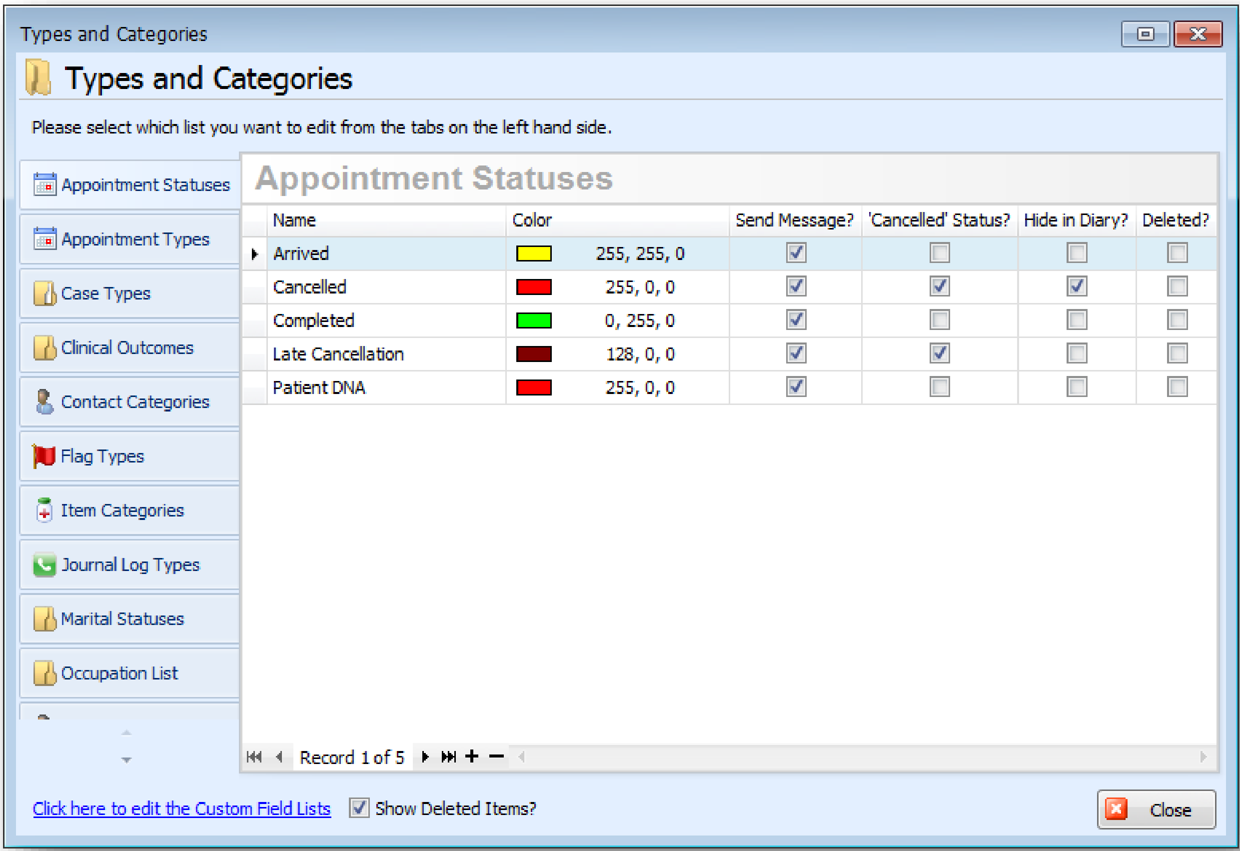


The idea is that clicking on this button will take you straight to the appropriate type/category editor so that you can change the list if you so wish.

By and large, all the Type/Category editors are the same with the notable exception of the Appointment Type editor and the Appointment Status editor which have some extra fields. Let's take a look:-

The Appointment Status Editor

The Appointment Status Editor



The first difference you will notice is that you can assign a **colour** to each Appointment Status. These colours appear down the side of the appointments in the diary, giving a visual indication of the status for each appointment.

The third column is "**Send Message?**", which allows you to select whether a "status change" message will be sent to the staff member when the appointment has changed to this status.

For example, imagine that Mrs Whiting has an appointment to see Dr Smith. By default the Appointment Status in the diary will be set to **None** (the colour down the side will be grey). When Mrs Whiting arrives, the receptionist changes the appointment status to "**Arrived**". If there is a tick in the Send Message column for **Arrived** (which there is in the above example) then ClinicOffice will automatically send a message to Dr Smith saying that Mrs Whiting has now arrived (this will change the colour down the side to yellow).

The fourth column "**Cancelled Status?**" allows you to specify if you want to register the appointment status as a cancellation type status; this will mark the appointment on the diary as being cancelled. Also the status will appear under the "Cancel Appointment" section of the right click menu in the diary.

The fifth column, "**Hide in Diary?**" will mean that when the appointment status has been selected it will hide the appointment from the diary, unless specified otherwise in the Diary Options. This is particularly useful when used in conjunction with the "Cancelled Status" as it will hide the cancelled appointment from the diary while it still exists on the database.

Lastly the sixth column, "**Deleted?**", when ticked will make the appointment status inactive so that you can no longer select it on the diary or in an appointment. The value however will remain present in appointments that have already had the status assigned. You can hide the appointment statuses marked as "Deleted" on the Appointment Status editor by un-ticking the **Show Deleted Items** checkbox.

The Appointment Type Editor

Like the Appointment Statuses you can assign each Appointment Type a unique **colour**. Simply double-click on the colour field to select one from the pre-defined list or from the provided colour-selector. This serves as a visual aid to identifying each appointment type. Since the colour changes the background of the appointment on the diary it's good to use lighter pastel colours which won't obscure the text.

The second thing you will notice is that you can choose the **Default** duration of that appointment. ClinicOffice will now notify the user if they have assigned the incorrect time to an appointment of that type and offer to auto adjust it.

You can also mark an appointment type as being "**Bookable Online?**" which will allow patients to select that type when booking online. This will only work if you have our Online Diary module.

You can assign a default charge amount to an appointment type via the Charge Item column; this is a drop-down menu which pulls its information from Items/Services section of ClinicOffice. For more information about how this works please see the next section "Creating a New Appointment Type".

Appointment Type Groups

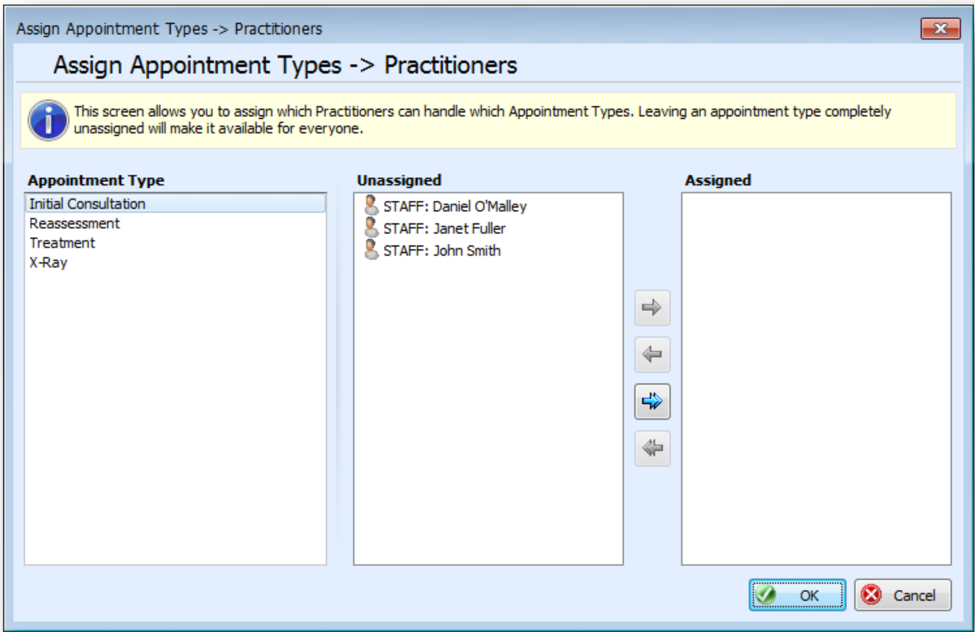
Depending on the services your clinic offers you may require dozens or even hundreds of different appointment types. This can be confusing for the staff when trying to locate the correct appointment type for an appointment. This is where groups can help to organise your appointment types.

You can create an appointment type group by clicking on the blue link **Edit Groups…**, which sits above the appointment type grid. The Appointment Type Groups window will open, click on the small plus + button at the bottom and type in the name of your new group. You can add as many groups as you like to this section. Once finished, click the **Close** button.

By default, the Group column will not be displayed within the Appointment Types editor; to display it, tick the **Show Appointment Type Groups** checkbox (next to the Edit Groups blue link). The Group column will appear, and you can now assign your appointment type group to the appointment types.

Assigning Appointment Types to Practitioners

Another helpful feature is the ability to assign specific appointment types to certain practitioners. This is useful if appointment types can be handled only by certain practitioners. This also helps to eliminate the possibility of an appointment type being assigned to the wrong practitioner.



You can access the above screen by clicking the **Assign Appt Types -> Practitioners** button. To assign a staff member to an appointment type simply select the appointment type on the left hand side, then select your practitioner you wish to assign and click the top arrow pointing to the right. This will move that practitioner into the Assigned column. If there is an appointment type that all practitioners can perform then it is best that you leave everyone in the Unassigned column; this way you can assign the appointment type to all practitioners when in the diary.

Creating a New Appointment Type

Creating a new appointment type is a twofold process. The first part is where you must create a new Item /Service. The second is where you must create a new Appointment Type inside the Types and Categories and then link up the Item/Service with it. This is so that when an invoice is raised for this appointment type a value will be automatically generated for it. If you do not wish to have a default charge for an appointment type, you can skip the first stage.

First Stage

- Go to the Items & Services grid. To do this either click on the drop-down menu on the **FINANCES** button and select Items/Services or go to the Finance section and click on the **ITEMS & SERVICES** button in the Finance Centre.
- Right-click on the grid
- Select **New Item/Service**, the Item/Service editor will open
- Enter a name into the **Description** field i.e. “Domiciliary”
- Enter a value into the **Item Code** field. Most of the time this would be the same as the description.
- Enter a value into the **Sale Cost** field
- For an appointment type you can leave the **Purchase Cost** and **Tax Percent** fields empty
- For the **Category** field select **Service**, you may use another category type if you wish
- You can leave the **Supplier** and **Notes** field empty
- Once you have finished entering in all details click **SAVE AND CLOSE**

Second Stage

- Go to the **View** menu
- Click on **TYPES AND CATEGORIES**
- Inside the Types and Categories window, click on the Appointment Types tab (down left-hand side)
- Now create a new item by clicking on the + button (located near the bottom)
- Enter the Appointment Type’s name (usually the same as the Description of the Item/Service)
- You can assign it a colour if you wish
- Give the appointment a duration time
- For the **Charge Item** column select you’re Item/Service; the Item/Service will be displayed in the list as it’s Item Code rather than it description.
- Once you are done click **CLOSE**

Now when you go into your diary to create a new appointment you can select your new appointment type. Also when you raise a new invoice a default charge will be raised.

You will note that at the top of the Appointment Types screen is a button called **Assign Appt Types -> Practitioners**. If you click on this a new window will open. From here you can assign appointment types so that only certain members of staff can perform them.

To do this simply select an appointment type and highlight the desired staff from the Unassigned column, then click the **Add Selected** button to add them to the Assigned column. If you want everyone to be able to perform that appointment type you can leave them all in the Unassigned column.

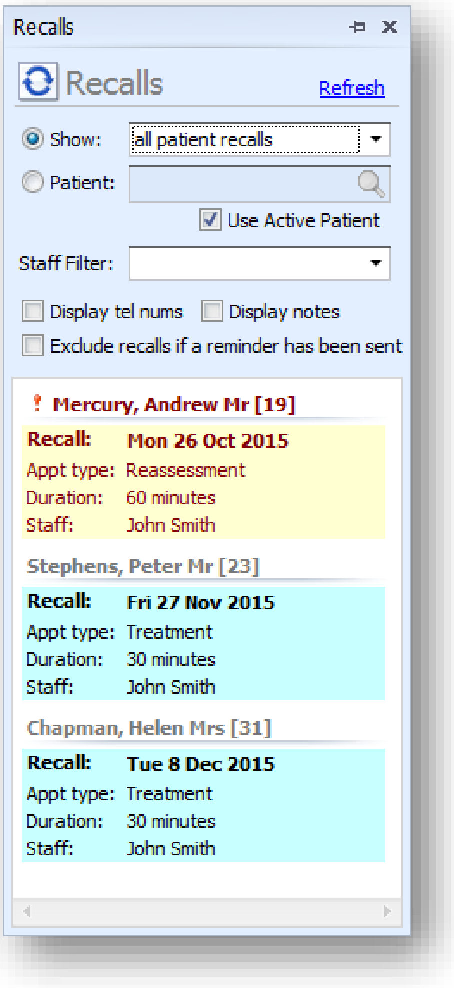
Patient Recall

The Recall System allows you to remind patient's that they are due another appointment and that they need to rebook it. The way in which it works is like the Waiting List, but the Waiting List is something definite i.e. the patient already has confirmed the appointment but is waiting for the correct time to be available. On the other hand, the Recall is not something definite; it serves more as a reminder that the patient should rebook for another appointment.

The recalls are stored in a panel which is located to the right-hand side of the Appointment Diary and it comes in the form of a tab.

The Recalls Panel can be broken down into the following options:

Recalls Panel



Show	This allows you to select the range of Recalls you wish to display. Such options are all patient recalls, due today, due next week or overdue recalls.
Patient	This allows you to search on an individual patient's recalls.
Use Active Patient	This inserts the active patient's name automatically into the patient search field.
Staff Filter	When a staff is selected here only the recalls assigned to them will appear.
Display tel nums	This displays the telephone numbers on the recalls if one exists for the patient.
Display notes	This displays any notes that have been added to the recall.
Only show if no reminder sent	This will hide all recalls where a reminder has already been sent.

When the recall is due for today the text will turn a bold blue, but when it is overdue the text turns red. If no reminder has been sent and the recall is overdue as well, then an exclamation mark will appear at the top. As soon as a reminder has been sent the exclamation will turn into a bell icon, indicating that the reminder has been sent.

You can change the recalls that are on display by changing the value in the **Show** field. For example, if you set it to **next week** then only recalls that are due up for next week will be displayed. On the other hand, if you select **Overdue Recalls**, only recalls that have not been dealt with for their given date will be displayed.

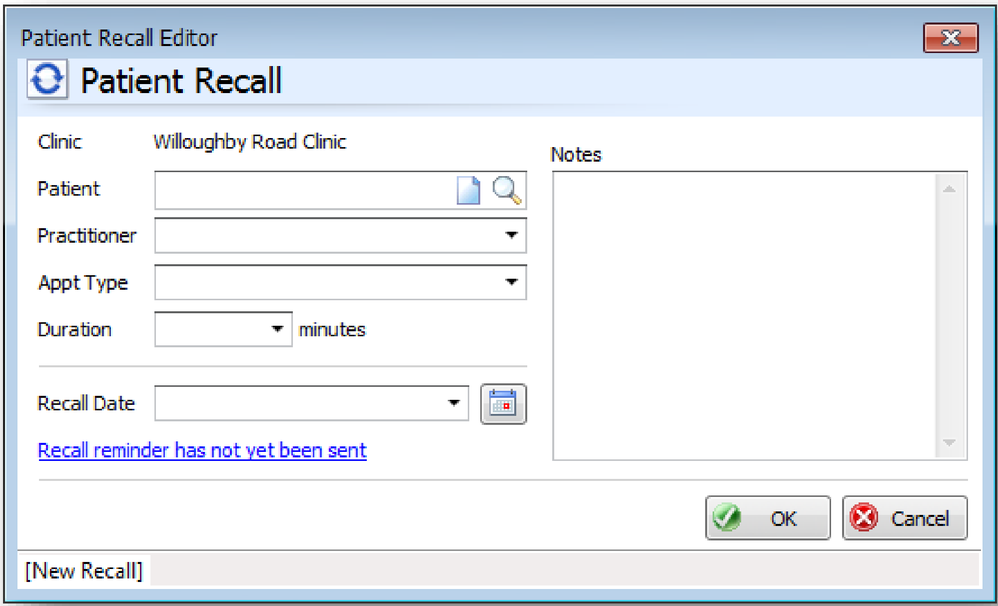
When the patient has confirmed an appointment time you can drag and drop the recall onto the diary. This will automatically create the appointment for you.

Creating New Recalls

There are multiple ways to create a new recall. Follow the steps below to see how to create a recall using one of the methods:

- Go to the Recalls Panel
- Right click on the section where the appointment recalls are stored and select **New Recall**; the following window will appear:

Patient Recall Editor



- Enter the name of the patient you are creating the recall for
- You can choose to enter the name of the practitioner and the App Type if you wish to
- You will need to enter the duration of the appointment. You can select one of the values given or enter your own.
- You now need to enter the Recall Date. If you click the  icon it will give you a list of preselected values.
- Click **OK** when you have finished

The new recall will be added to the Recalls Panel.

Another way to create a new recall is to right click on an appointment in the diary and to select the **Recall Patient**. The Patient Recall Editor will open up and you will note that some of the field values have automatically been filled in. You can do the same by opening the appointment record up and clicking the **Recall Patient** button. You can also drag and drop the appointment straight onto the Recalls Panel and this will again open the Patient Recall Editor. Inside the Patient Editor on the ribbon bar there is the button **Recall Patient**, which also opens up the Patient Recall Editor in the same manner.

Sending Out Recall Reminders

There are two ways of sending out a recall reminder. You can either send out an individual reminder for a single recall or send out multiple reminders to a group of patients who match a certain criteria at a specific time.

To send out a single reminder please follow the steps below:

- Open a reminder via the Recalls Panel
- Click on the blue link which says **Recall reminder has not yet been sent**
- Select **Send Reminder**

To send off multiple reminders please see the section “Creating a New Rule” under “The Patient Contact Centre”.

As soon as a reminder has been sent out the blue text will change at the base of the Patient Recall editor to show the method of contacting the patient and the date and time it was sent out. It might look something like the example below:

Recall Reminder [Letter] sent on 24/08/2009 at 15:39

Deleting Recalls

You can delete either a single recall or a set of recalls which are older than a specified time. To delete a single recall simply go to the Recalls Panel right click on a recall and select **Delete Recall**. Alternatively go into a recall and click the **Delete** button.

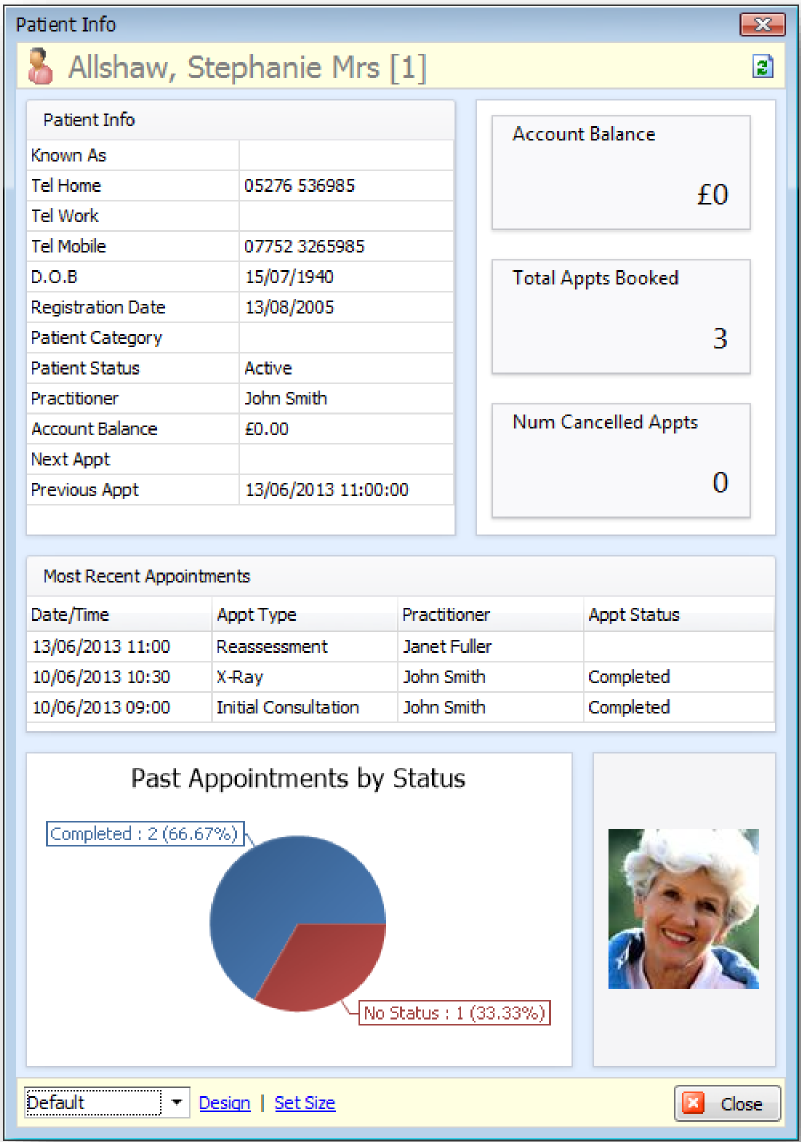
To delete multiple recalls right click on the section where the appointment recalls are stored and select **Delete Expired Recalls**. You can choose to delete either 1 Month, 2 Months, 3 Months, 6 Months or 1 Year. Press **OK** after you have selected. This will only affect overdue reminders.

Patient Information

The Patient Information is a helpful utility that is in the Appointment Diary. At a quick glance it can tell you the essential details about a patient. You can access the Patient Information window by clicking on the Patient Info button 

(next to the diary's Search button). The following window will appear:

The Patient Info Window



Once the window is open, all you need to do is left-click on an appointment and open the window. The details of the patient who is attending this appointment will be displayed.

By default the window will display patient information such as the home telephone number, work telephone and date of birth to name a few. It will also show 3 display cards of the account balance, total appointments booked and number of cancelled appointments. A bit further down it will display the most recent appointments. At the bottom it will show past appointment statuses on a pie chart i.e. completed or cancelled. To the left of this is an image of the patient if you have one for them.

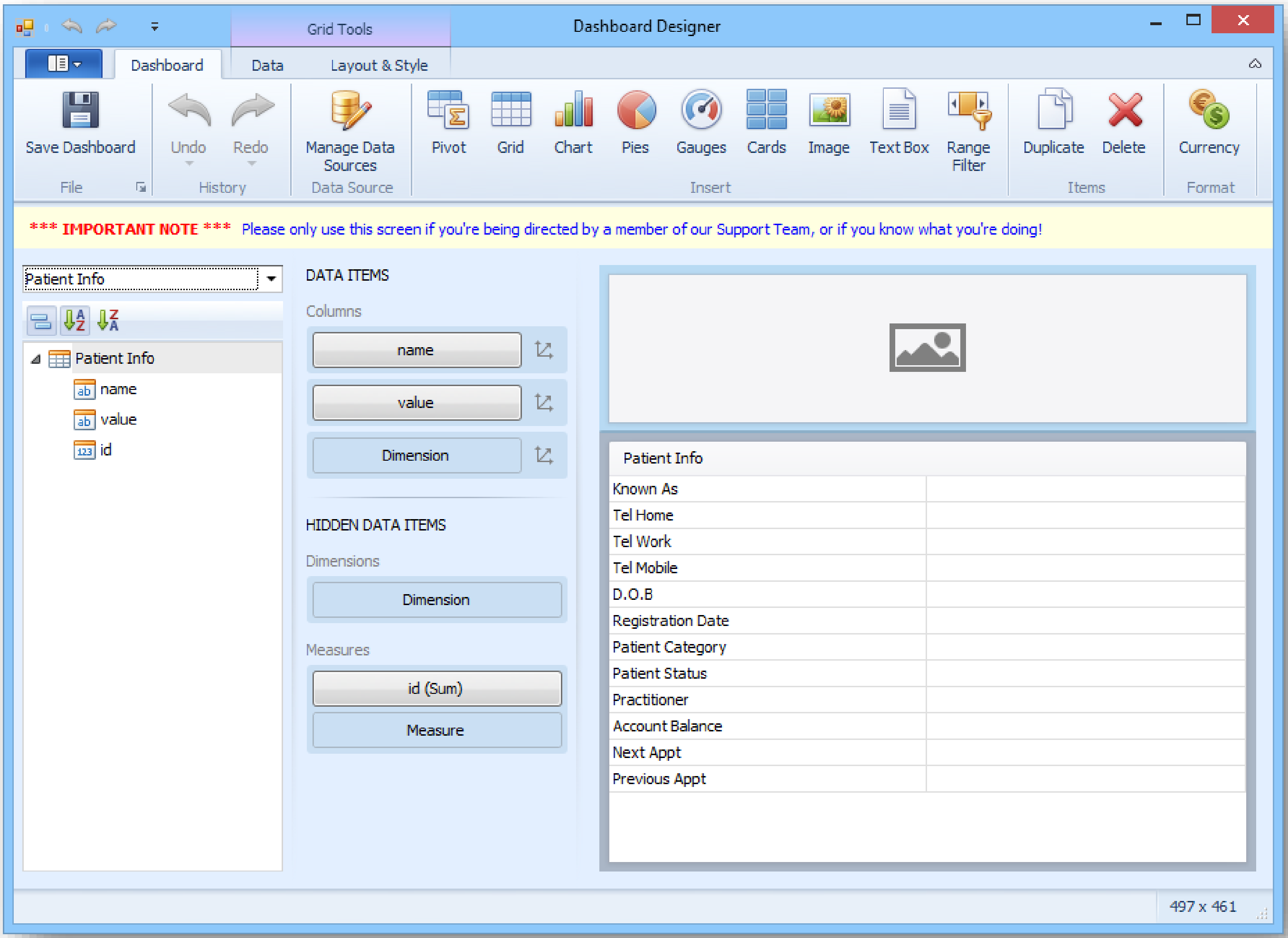
You can change the view of the Patient Information window by clicking on the drop down menu in the bottom left hand corner and selecting "Compact". When the compact view is selected the Patient Info screen changes so as only to display the patient's image and their basic information.

You can resize the Patient Info window like many other windows in ClinicOffice and then save this size by clicking the "Set Size" blue link at the bottom of the window.

Editing the Patient Information Window

At the bottom of the Patient Information window you will note there is a “Design” link. This will take you to a new window that will allow you to customise the appearance of the Patient Information window. You will have to edit each view separately. So, for example if you want to edit the Default view you would select “Default” and then click “Design”. If you wish to edit the Compact view you would select “Compact” and then click “Design”. The Dashboard Designer Window will appear.

Patient Info Dashboard
DesignerWindow



At the top of the screen are the buttons to save the edited dashboard, to undo and redo any changes, to edit the dashboard’s SQL sources and also buttons to insert new components into the dashboard. The last 3 buttons on the ribbon bar will allow you to duplicate the current dashboard, to delete it and alter the currency. You will note that there are some additional tabs on the ribbon bar and these will change according to the component you have selected on the dashboard designer. For example if you have a grid selected then these tables will change to the Grid Tools.

The way the dashboard works is that each component will have its own SQL source. When you click on a component such as Patient Info the drop down menu field will change to Patient Info. In turn just below that you will see the values: “name”, “value” and “id” appear. You will note that under Data Items the items “name” and “value” will be inserted. In this particular instance the grid is being grouped and summed up based on the patient’s id. You can see this because the item “id” is inserted under the Measure section.

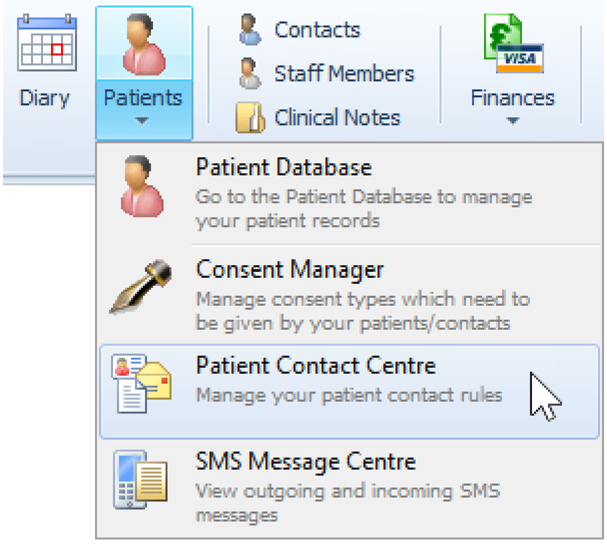
When adding a new component into the dashboard, from the insert section of the ribbon bar, you need to select a SQL source first, form the drop down menu field. Once you have selected this you need to add items from that source into the Data Items columns so that information can be displayed. You can choose to hide some items by dragging the items to the Hidden Data Items section. You would do this if you wish to sort by that item’s value but not display it. You can measure or summarise data by dragging another item under the Measures section. Any changes made you can select to save them by clicking on the **Save Dashboard** button.

The Dashboard Designer has many advance components and because of this it is recommended that you seek the direction from our technical support team (support plan required) before it is used. Alternatively you can post on our support forum (www.clinicofficeforum.com) for advice and aid in using this feature.

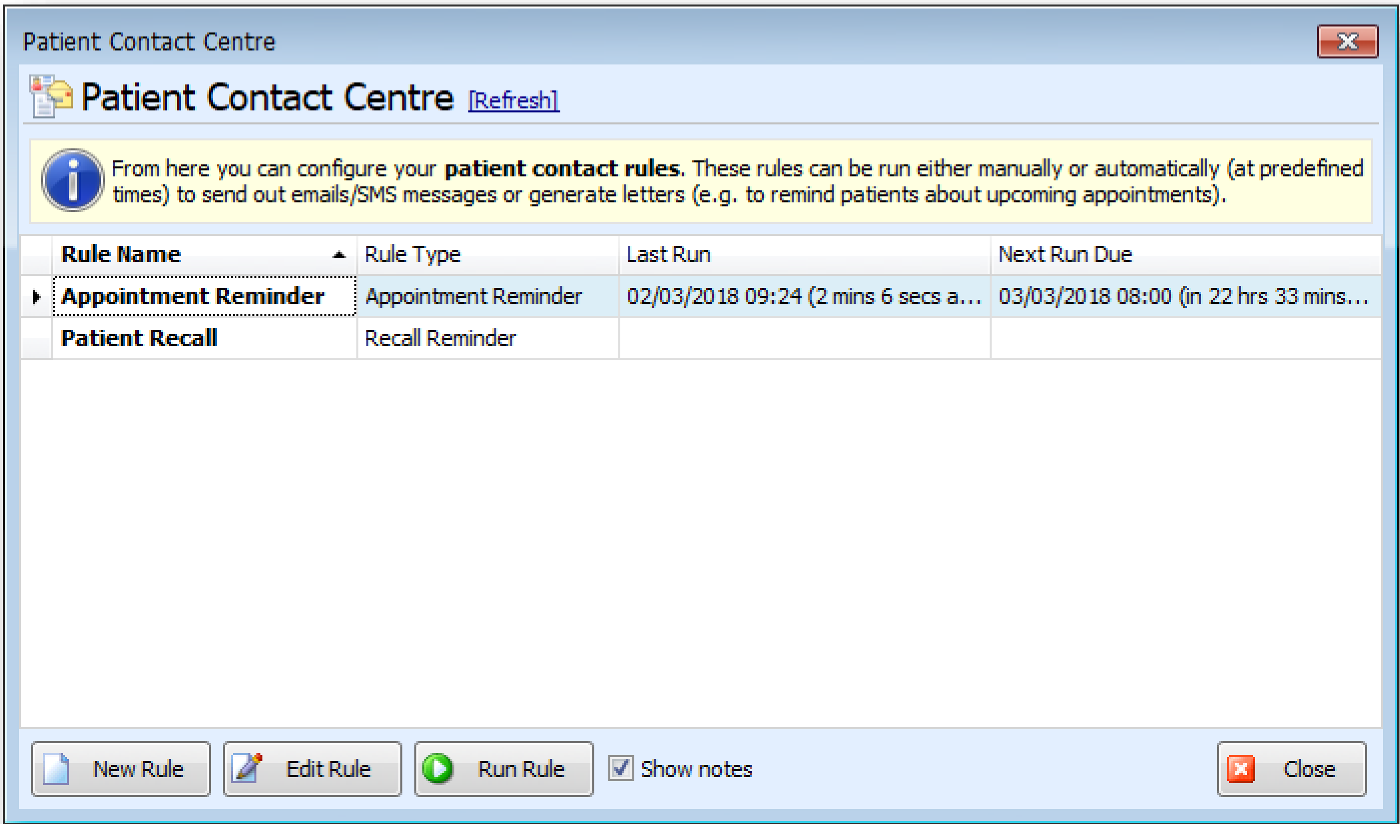
Patient Contact Centre

The Patient Contact Centre is where you choose the ways in which you wish to contact your patients. For example, you could tell ClinicOffice that you would like an SMS message to be sent the day before each appointment. Once the rule is setup and told to run, then ClinicOffice will automatically process the rule for you.

You can access the Patient Contact Centre by clicking on the lower half of the **Patient** button (within the Home menu) and clicking the **Patient Contact Centre**.

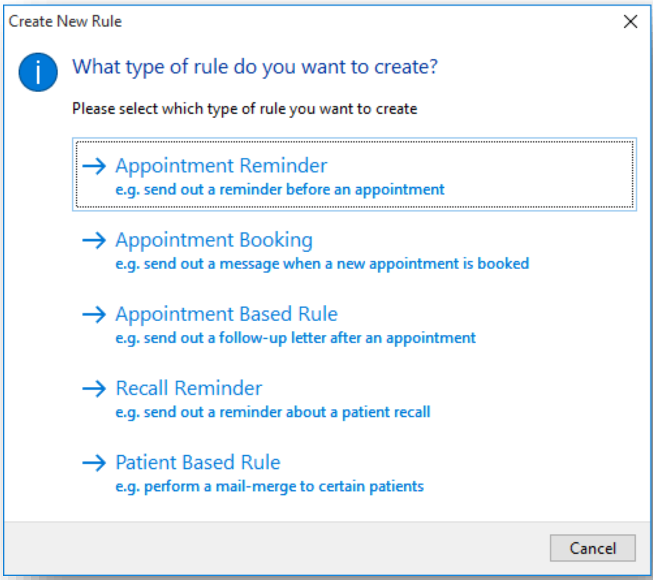


The Patient Contact Centre will appear in a separate window and will look like the window below. From here you can create new rules, edit existing ones, preview and run the rule.



Creating a New Rule

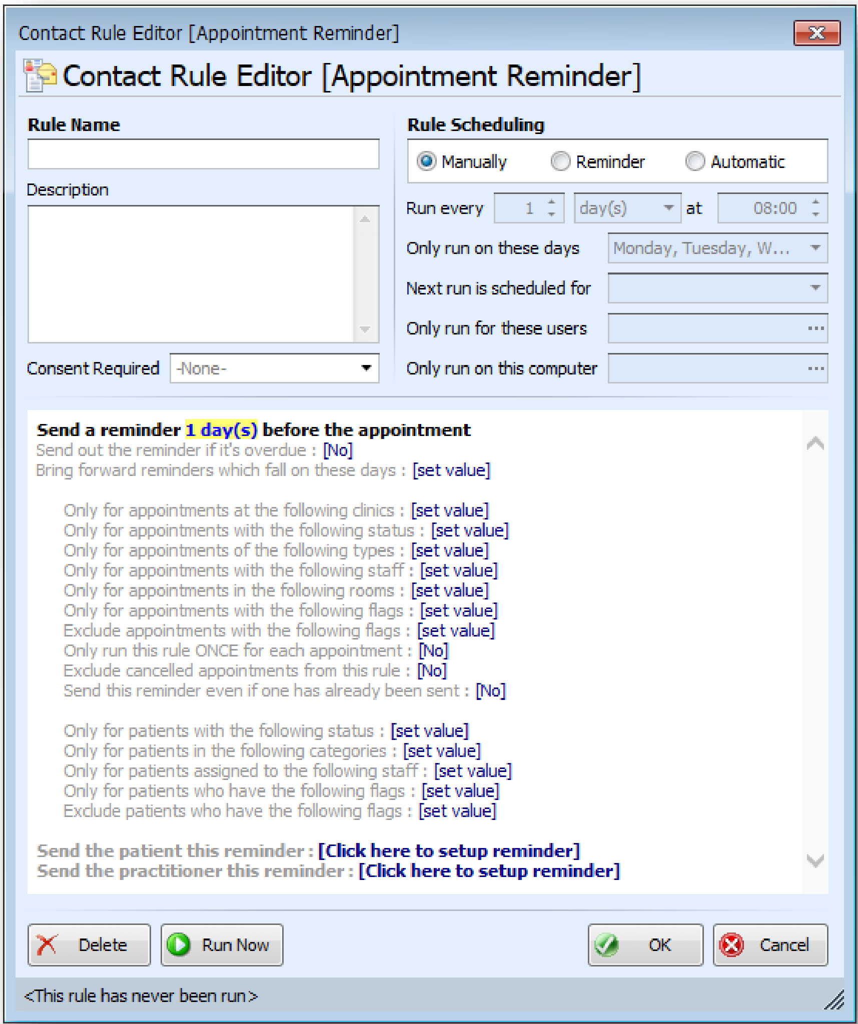
To create a new rule click on the **NEW RULE** button, (or right-click and then select **New Rule**) the following message will appear.



You are presented with 5 different options: Appointment Reminder, Appointment Booking; Recall Reminder, Appointment Based Rule or a Patient Based Rule. The difference between the 5 will be shown soon.

Appointment Reminder

If you select **Appointment Reminder** the following window will open:-



The Rule Editor will allow you to:-

- Name the rule and add a description.
- Specify that a consent type is required before a patient can receive a message
- Schedule the rule so that it will run either manually, send a reminder to run it or run it automatically.
- Select the day you wish to run the rule and when it is next scheduled to run.
- Select which member of staff you wish to run the rule and on which computer
- Set the conditions that the rule is to run on.
- Delete the rule.
- Run the rule.

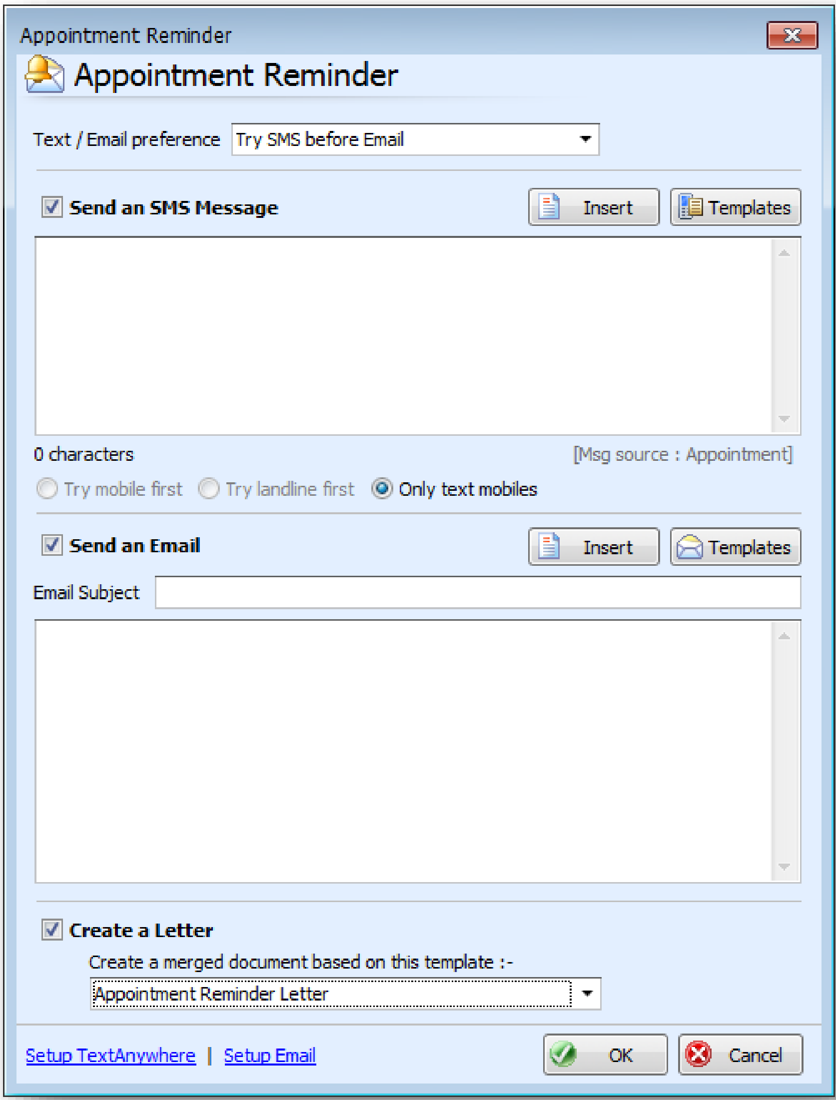
To understand how this editor works follow the example below:-

- In the Contact Rule Editor [Appointment Reminder] window enter a name in the **Rule Name** field.
- Select **Reminder** which is under Rule Scheduling near the top.
- Select **Run every**: **1 day(s)** at **12:00**.
- In the field **Next Run is scheduled for** select yesterday's date so that a reminder message will appear today.
- Click the three little dots which are in the **Only run for these users** field. A list of staff members will appear. Select the staff you wish to receive the reminder about running the rule and press **OK**.
- Click the three little dots which are in the **Only run on this computer** field. Your computer name will appear indicating that the rule will run only from this computer.

What you have done so far is set the rule so that it will send a reminder message to you every day at 12 o'clock. As the next scheduled run was yesterday you will receive a reminder shortly after you have created the rule.

Now to set the rules conditions:-

- Where it says **Send a reminder 1 day(s) before the appointment**, left-click on the **1 day(s)** and set it to **2 day(s)**.
- Where it says **Only for appointments with the following staff** left-click on the **[set value]** and choose one of the staff members.
- Select **[Yes]** for **the Exclude cancelled appointments from this rule**.
- Now set the value to **Active** for **Only for patients with the following status**.
- Left-click on the blue text which says **[Click here to setup reminder]**, the Appointment Reminder window will open.



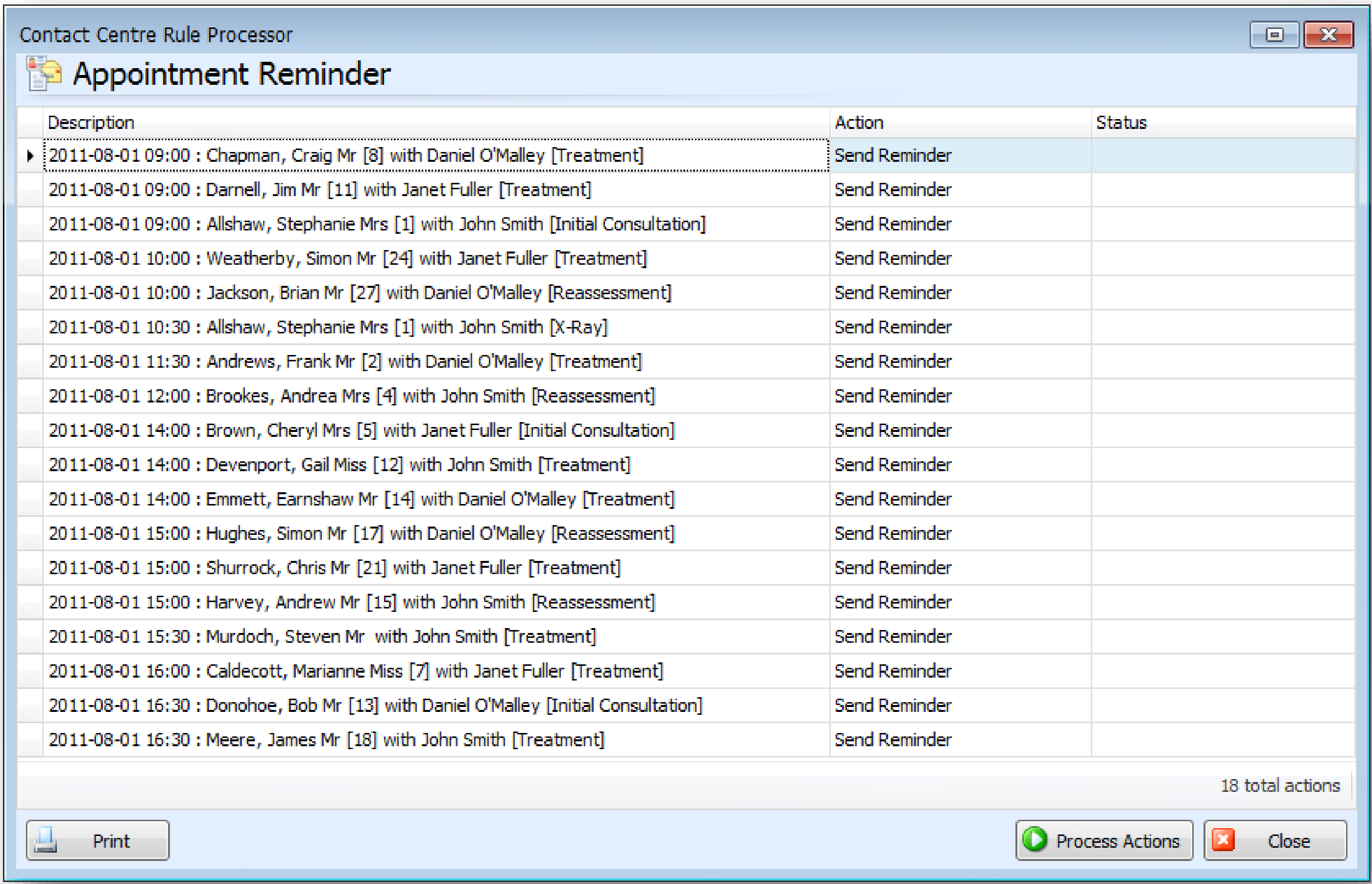
If you haven't already done so, you will need to enable the SMS service in order to send SMS messages. Likewise you will need to setup your email account details so that you can email patients.

You can send a reminder to patients by either sending an SMS message, an email or a letter. In the **Text/Email preference** field you can choose to either send an SMS first then try an email, send an email first then try an SMS or do both at the same time. You can choose to use all 3 options or just one of them. To select one of the methods simply tick the box that is found at the top of each section.

You enter information into the SMS Message and Email fields the same way you would when entering information into either the SMS Message or Email windows (See the section Sending SMS Messages and Emails).

- For this example select **Create a Letter** and press **OK**.

- You can either wait for the Scheduled Rule message to appear and then run the rule from the message or go to the Patient Contact Centre select this rule and click **RUN RULE**. The Patient Contact Centre Rule Processor will appear:-

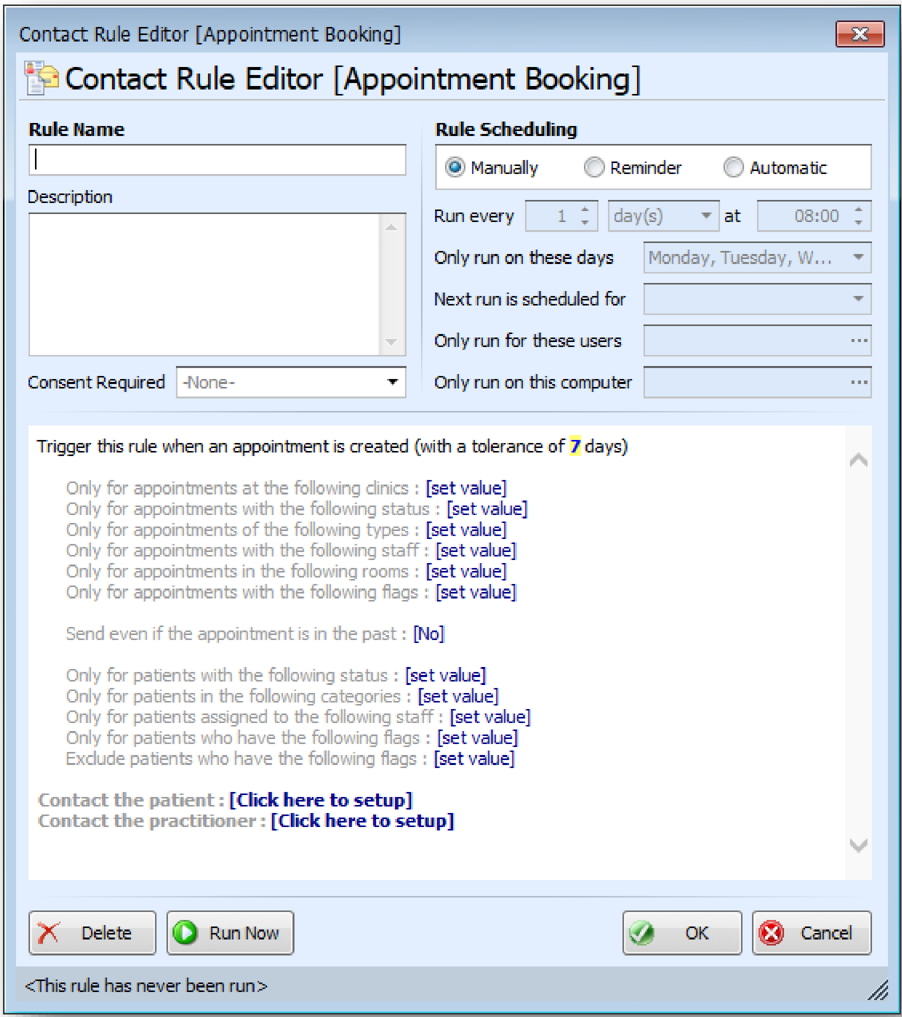


- If you are happy with the patients selected click Process Actions.
- The Rule Processor will now work through each patient informing you if the process was successful.
- Since these are letters that have to be printed out COv5 will store them in order to do this.
- To view these, click on the **VIEW CREATED LETTERS** in the Patient Contact Centre Rule Processor, then click on the **Appointment Reminder Letter**. You can also view them by going to the Patient Contact Centre and left-clicking on the blue text which says **There are some documents which need to be printed – click here**, then select **Appointment Reminder Letter**.
- The ClinicOffice Word Processor will now open with the new merged letters being displayed. If everything appears to be okay press the **PREVIEW** button located in the ribbon bar.
- To print the letters click the **PRINT** button.

After the letters have been printed, COv5 will clear those newly printed letters from its memory. In the **Appointment Diary** you will notice a small letter icon () appear on appointments when a reminder has been sent.

Appointment Booking Rule

When you select **Appointment Booking** the following window will appear:-



The Appointment Booking rule although based on appointments, works on a different basis to the Appointment Reminder. The Appointment Reminder works on the basis of the date of the appointment; however the Appointment Booking is based on the “Created On” date of the appointment instead.

So the purpose of the Appointment Booking rule is to send an email or text message to the patient, to confirm that their appointment has been booked. What this means is that if a new appointment is created for next week or it is booked for next year, in both situations that appointment would receive a booking confirmation message when the rule runs. This is because the created on date would be today for example.

If you wish to run the rule automatically each day this is fine, but given the nature that the rule will send out messages based on when the appointment has been created it is usually recommended to set the rule to run towards the end of the day. Doing it this way, people will more likely receive their confirmation on the day the appointment has been created.

<u>What if an appointment is created after the rule has already run for the day?</u>

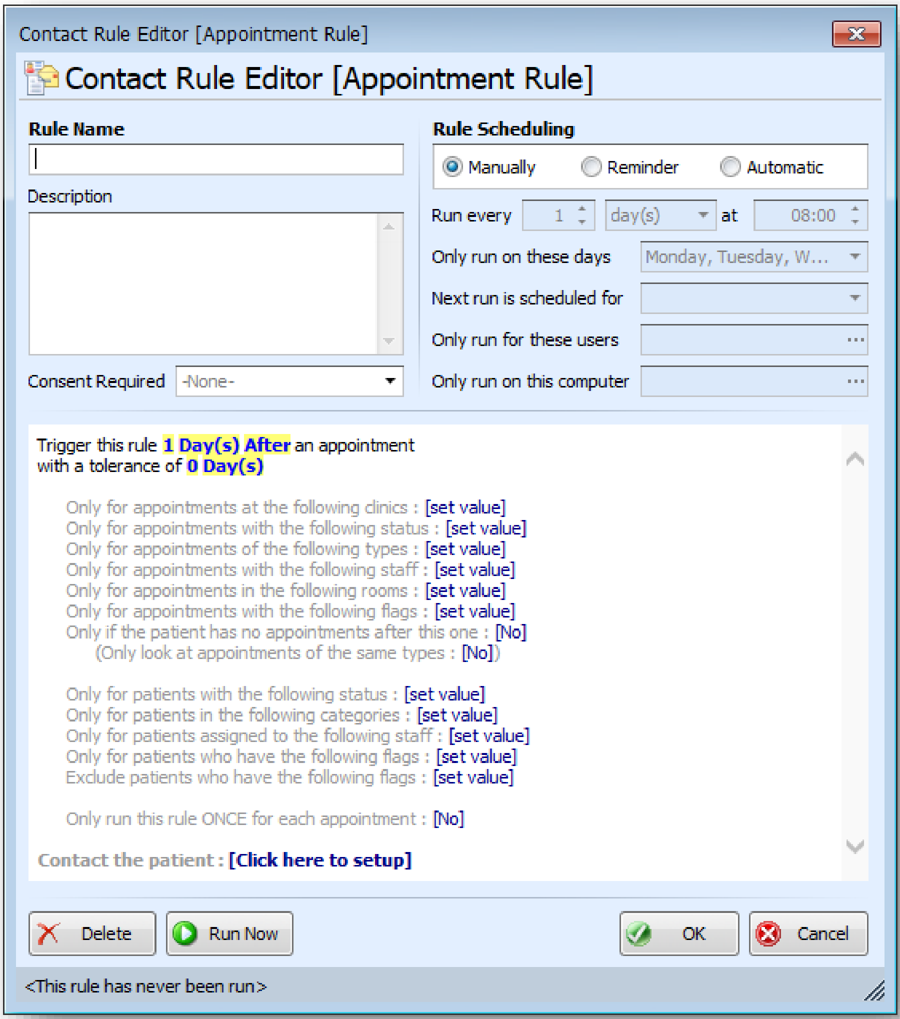
This is not a problem as the Appointment Booking rule does have a tolerance setting (7 days by default). What this means is that it will factor in the created on date for appointments from the past 7 days for example. So if an appointment was created yesterday but did not receive a booking confirmation message, then the rule will still pick up on it and send out a message for it.

<u>Is there a risk that a patient might receive more than one appointment confirmation?</u>

The short answer to this is NO. Once a confirmation message has been sent out for an appointment, another one will not be sent. The only way they might receive more than one booking confirmation at the same time is if they have had more than one appointment booked for them at the same time, but this will still only be one message per appointment. If they happen to have two appointments on the same date but they are different appointment types you can always specify that only certain appointment types receive a booking confirmation.

Appointment Based Rule

If you select **Appointment Based Rule** the following window will open:-



The Appointment Rule works in the same manner to the Appointment Reminder. There are just a few things that are different.

One of them is the Appointment Based Rule has a tolerance rule in addition to the trigger rule. If you have the trigger rule set to **3 Day(s) After** an appointment, all appointments 3 days ago will be selected. If you have the tolerance rule set to **2 Day(s)**, all appointments from 3 days ago to yesterdays will be selected. What this rule does is extend the number of days covered.

The problem with the tolerance rule is it will carry out the function (i.e. sending a letter to a patient) on the same appointment every time the rule is run, so long as the appointment falls into the range of the tolerance rule. This can mean that patients could receive a dozen letters. So to get around this the Appointment Based Rule has the rule **Only run the rule ONCE for each appointment**, which is located towards the bottom of the editor. You are given the options of **[Yes]** and **[No]**.

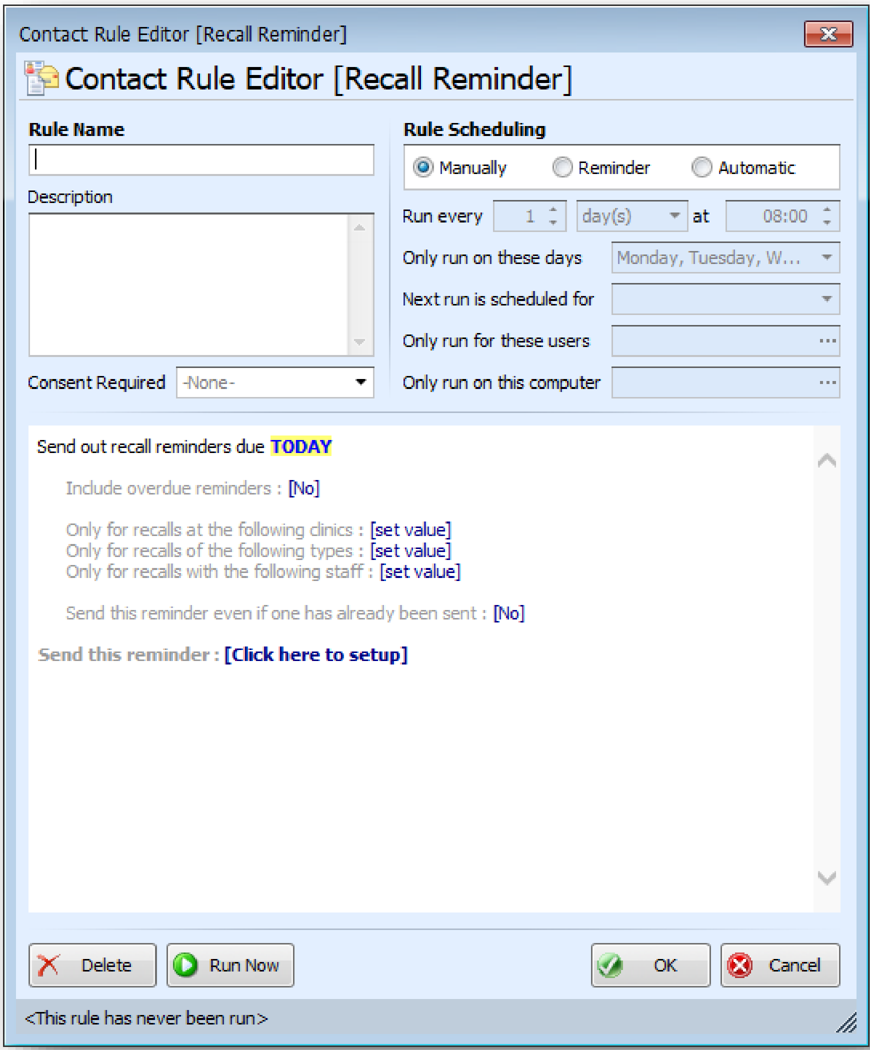
One of the usages of the Appointment Based Rule is to send a letter reminding the patient that they need to book another appointment. To assist you there is a rule which states **Only if the patient has no appointments after this one**. If you select **[Yes]** to this then only patients who have no future appointments after this one will be sent a letter. As a patient might be seeing the clinic for more than one treatment type there is an option **Only look at appointments of the same types** which will help up narrow down on the patients who should receive a message.

You will also notice that at the bottom of the **Contact the Patient** window (accessed by clicking the link **Contact the patient: [Click here to setup]**) there is a greater variety of merged letters to send compared with the Appointment Reminder Rule.

Apart from these differences the Appointment Based Rule is the same in every other way to the Appointment Reminder.

Recall Reminder

If you select **Recall Reminder** the following window will open:-



The Recall Reminder is like the appointment reminder except for the fact that it is based on recalls instead of appointments. The recall reminder is one the simplest reminders to set up.

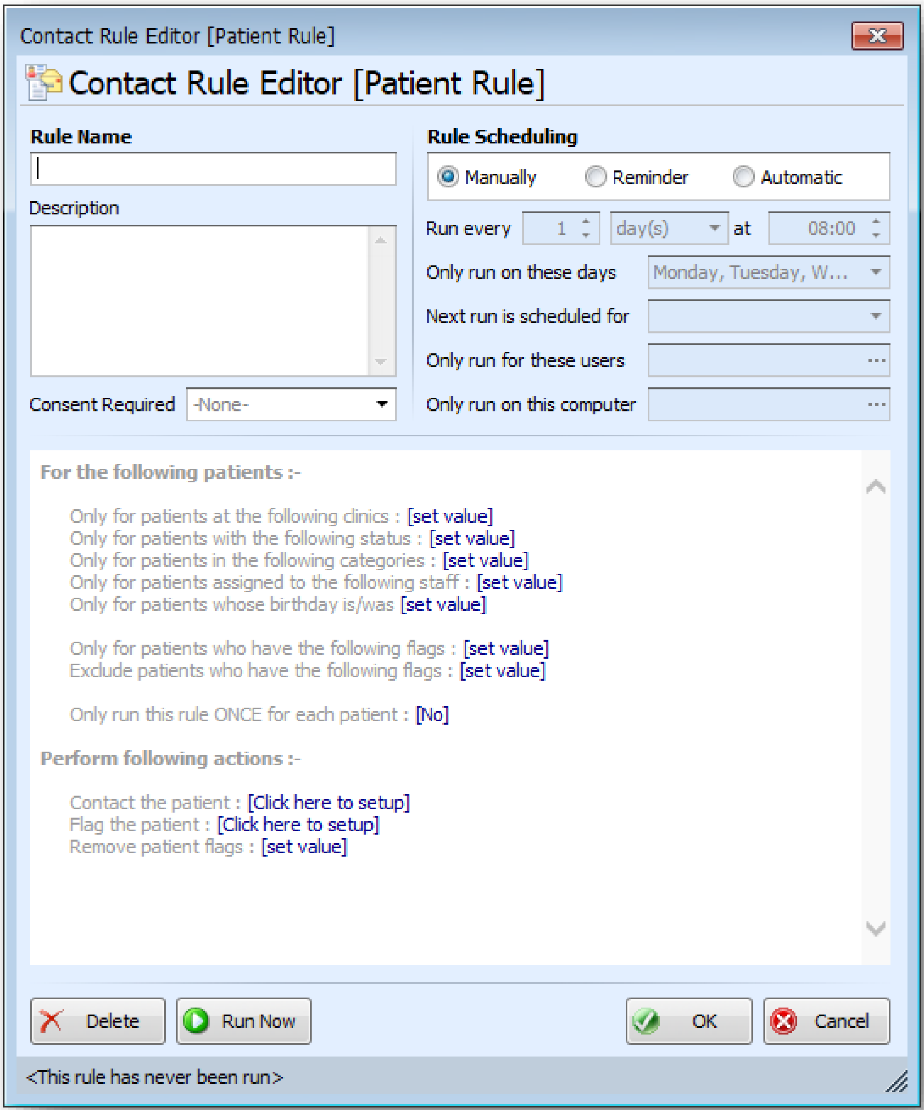
You have the option to send out the recall reminders either for the ones that are due today, this week or this month. There is the option to include overdue reminders as well. If you do leave it as **No** then any overdue recalls will not receive a reminder.

The Recall Reminder only requires 3 additional filters. They cover the clinics, the types of recalls and the staff member that the patient's recall is assigned to. You can also choose to send this reminder out more than once for the same group of recalls if you wish.

You will also notice that at the bottom of the **Contact the Patient** window (accessed by clicking the link **Contact the patient: [Click here to setup]**) there is by default a small selection of letters to choose from.

Patient Based Rule

If you select **Patient Based Rule** the following window will open:-



The Patient Based Rule is unlike the other three in that it is purely based on the patient's record. It is identical though in the way it works. The patient rules that are used here, are in the same format as the other three rule editors. One of the most noticeable features about the Patient Based Rule editor is that you can perform three actions unlike the other three rule editors (these can only perform one).

The three actions that can be performed are:-

- Contact the patient — This allows you to send an SMS message, email or letter to the patient.
- Flag the patient — By using this action you can choose to flag a patient's record.
- Remove patient flags — This action will remove a particular flag from the patient's record.

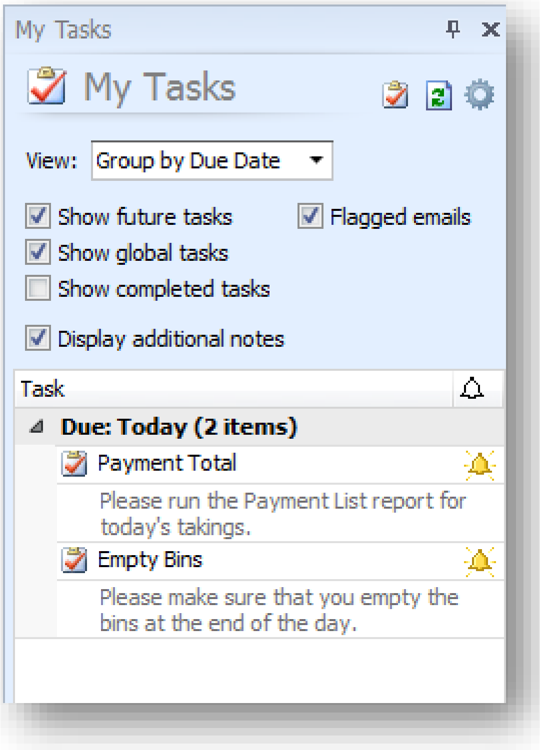
The Patient Based Rule runs on the same principles as the other three rule editors. This means that to create a rule for this is similar to creating a rule using either three of the other editors.

The best way to use the Contact Rule Editors is to break them down into parts. Each section makes sense when you read through it. Before using the rule editors on a regular basis it might be an idea to do one or two test runs. To delete a rule simply right-click on it in the Patient Contact Centre and select **Delete**.

Task List

Another feature of ClinicOffice v5 is the Task List. You can view your tasks by clicking on the My Tasks tab on the left hand side of ClinicOffice.

The Task List



As shown just above, the task list displays all the tasks that you are permitted to look at. The list shows each task's priority, description and any notes for the task.

There are also two task groups, My Tasks and Global Tasks. Global Tasks appear in everyone's task list, which is useful when a task needs to be done but it doesn't matter who does it. But Personal Tasks belong to you, these appear in your list, but no-one else can see them.

New Task	Create a new task (see "The Task Editor" topic).
Refresh	Refreshes the task list.
Settings	This either hides or shows a number of options related to the Task Panel.
Show future tasks	This will display future tasks.
Show global tasks	This will display tasks that are global.
Show flagged email	This will show flagged emails.
Show completed tasks	This will show completed tasks that have not been deleted yet.
Display task notes	Displays the notes for each task.

You can also right click on the tasks in the list. You will be presented with the options: New Task, Edit Task, Delete Task, Mark as Completed, Refresh and Print Tasks.

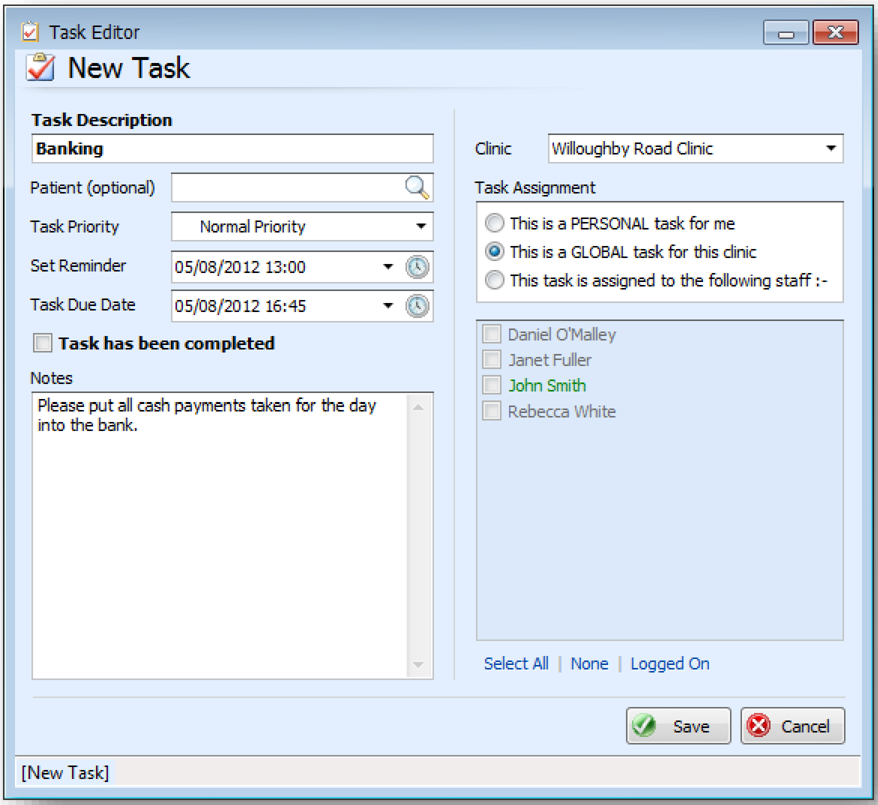
To create a new task click the New Task button. Alternatively click the Tasks button which is on the Home menu of ClinicOffice.

To edit a task, simply double-click on the task via the task list. This brings up the Task Editor, which we'll take a look at now.

The Task Editor

The Task Editor lets you create, view and edit the task items in your task list.

The Task Editor



This screen is fairly self-explanatory. The **Task Description** is obviously a description of the task. You can add extra notes in the **Notes** field if you need more space.

You can link a patient or contact to the task. You can also assign a **Task Priority** level to the task. Higher priority tasks appear further up the task list which is useful. The **Due date** is the date and time the task needs completing by, to help with this you can set a **Reminder**. If you have multiple clinics, then a task can be assigned to a specific **Clinic**.

Lastly there are three settings for the Task Assignment:-

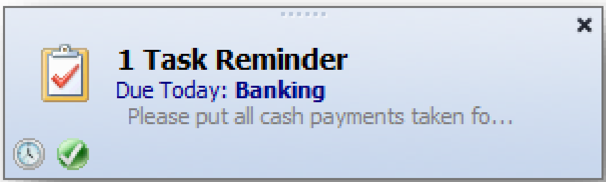
- This is a PERSONAL task for me — This task only appears in your list.
- This is a GLOBAL task for this clinic — Global tasks appear in everyone's task list. All users have full access to public tasks.
- This task is assigned to the following staff... — This will allow you to attach the task to a staff member.

If the task has been completed tick the box **Task has been completed** (above the notes field). This will put a strikethrough the task to indicate its completion. Click the **Save** button to save the task.

Task Reminders

When the task reminder is due, you will get a popup window appear like the one to the right.

Task Reminder



Task Reminders are very similar to the Message windows (see "ClinicOffice v5 Messaging"). Up to 4 task reminders will stack within the same window. You can view all tasks by right clicking on the window. From this window you can **Snooze All** ( ) tasks or **Mark All As Completed** ( ).

Clinical Notes

Clinical Terminology

ClinicOffice uses a structured method to record a patient's clinical history. Here's an overview of the terminology used in ClinicOffice to describe the different elements of a clinical history.

- **Cases**

  A patient who is being treated at your clinic will have one or more open cases. In most instances you will first create a new case record for a patient when they first visit your clinic for an initial consultation. The case record will remain open until you discharge the patient or are no longer treating them for whatever reason, at which point the case is closed.

  A patient may have more than one case open at a time. For example, if a patient is being treated by two separate practitioners for two different conditions, then he/she will have two open case records – one for each condition / treatment plan.

  A case record has the following fields:-

  a. A unique **Case Reference** number (generated by ClinicOffice)
  b. The **Case Type** (user-definable e.g. a specific diagnosis, complaint or condition)
  c. The **Primary Staff** (the member of staff who is primarily responsible for this case)
  d. **Case Opened** (i.e. when the case was started)
  e. **Case Closed** (i.e. when the case was closed)
  f. The **Outcome** (user-definable list e.g. "patient better" or "patient discharged self")
  g. A **Case Notes** field
  h. Additional **Custom Fields** of your choice

- **Sessions**

  Session records are usually linked to appointments – i.e. one session record is created for each appointment that a patient has. A session record contains your clinical notes for each patient visit.

  In most cases a session record will simply contain treatment notes from a patient visit, but we chose the generic term 'session' for ClinicOffice, because session notes are also used to record initial consultations, diagnostic sessions, x-ray appointments etc.

  Every session record must belong to a case (see above). For example, let's say a patient presents with a specific complaint. He receives a course of 10 treatments over the next few months, after which he is better and is discharged.

  Presuming that the patient had no prior history with your clinic then his Clinical History would consist of one case record which contains ten session records.

  A session record contains the following fields:-

  i. The **Date & Time** that the session took place (usually linked to an appointment)
  j. The **Appt Type** (appointment type, user-definable e.g. consultation, treatment, x-ray etc.)
  k. The **Staff Member** who handled the session
  l. The **Room** where the session took place
  m. The **Outcome** (user-definable list e.g. "patient better" or "patient discharged self")
  n. The **Clinic Name** of where the session took place (used if managing multiple clinics)
  o. Four customisable notes fields (Subjective, Objective, Assessment, Plan)
  p. Additional **Custom Fields** of your choice

This Case/Session paradigm forms the backbone of a patient's clinical history in ClinicOffice. There are however additional elements of the clinical history which augment the cases and sessions. These are **Forms**, **Visual Notes**, **Images** and **Documents/Files**. Collectively, they are referred to as 'attachments' because you can attach them to case records or session records or the overall patient record.

1) Clinical Forms

This basically lets you design a form template much like you would design a paper questionnaire form. You can add questions of different types to the form (e.g. yes/no questions, questions which require answers to be selected from a pre-defined list, numerical questions, free-form text questions etc.).

You can design any number of form templates (e.g. you may have one for 'Case History', another for 'Diagnostic Findings' etc.) which can then be attached to a clinical history.

(Please see the topic "Designing Forms" for more information.)

2) Visual Notes

The Visual Notes area is an optional add-on module for ClinicOffice v5. We have included a library of pre-defined Clinical charts and diagrams for you to use (although you can also import your own). The idea of Visual Notes is that you can draw on an image to give a visual representation of a patient's complaint/condition/symptoms etc. etc. There is also a small notepad (can be opened by pressing the **Notes** button) so that you can add any additional notes to the image.

3) Images

ClinicOffice allows you to attach images (in a JPG or BITMAP format) to a clinical history. This could include such things as a scanned image of a patient x-ray, a postural picture of the patient taken with a digital camera or even scanned paper documents detailing the patient's history.

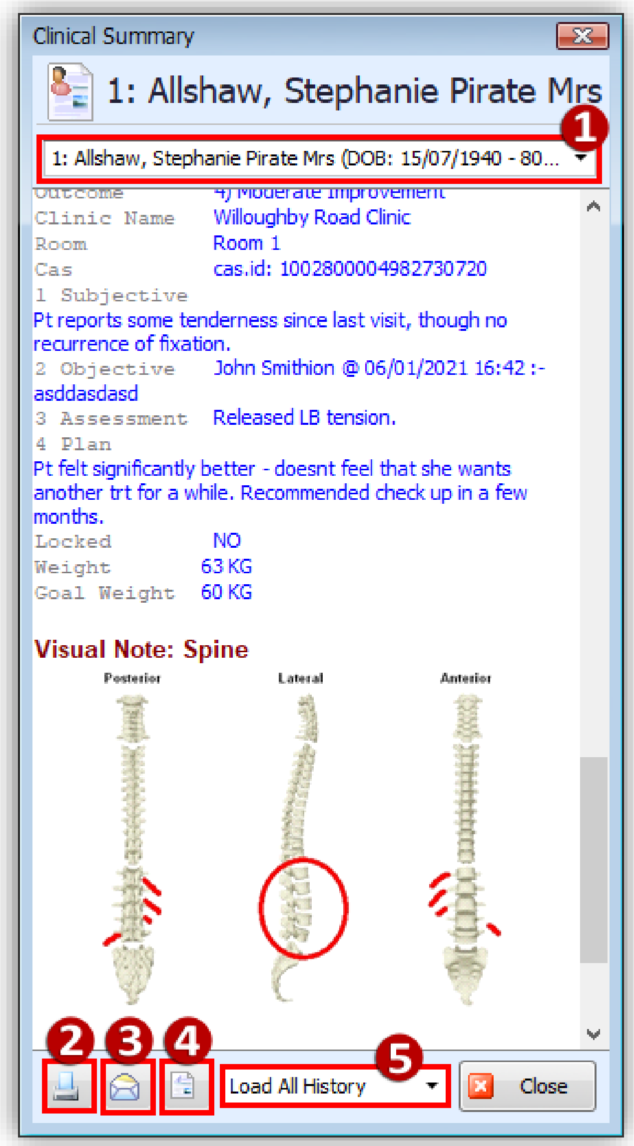
4) Documents and Files

ClinicOffice also allows you to attach any other type of computer document or file to a clinical history. This could include word documents, excel spreadsheets, text files – any file type at all.

By way of summary then, a patient's clinical history is composed of one or more **case** records, each of which can contain any number of **session** records. Additionally, you can attach **forms**, **visual notes**, **images** and **documents/files** to any part of the clinical history.

The Clinical Summary

A patient's clinical history can be represented by the Clinical Summary window as shown below.



The Clinical Summary displays all Cases, Sessions, Attachments, and the Patient's Details in one window. The purpose of this is to give an overview of a patient and a quick way to send out patient information to 3rd party medical providers such as a patient's GP. A few of the clinical summary components are explained below and are based on the numbering in the image to the left.

1) This drop-down menu works like an index, it allows you to select a section of the patient's clinical notes and will take you straight to that section.

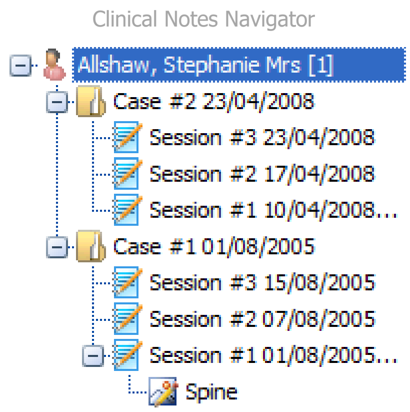
2) This Print button will take you to the print preview screen for these notes and from there you can print them off or save them as a PDF document.

3) This button is the "Send via Email" and when clicked it will offer to either email the patient or to email the patient's general practitioner. If the patient does not have a GP assigned, then the email will be addressed straight to the patient. When your email window appears, it will insert the relevant email address and attach a copy of this clinical information all zipped up.

4) This "Send to Word Processor" button will send this clinical summary to your local word processor program (for example Microsoft Word or LibreOffice Writer). This is for the purpose that you can perhaps remove or format information before sending it on.

5) Allows you to specify to load six or twelve months, one or two years, or to load everything. This is useful when a patient has notes dating back over many years and to reduce loading times.

The Clinical Summary will arrange and display the details the same way the Clinical Note Navigator is arranged.

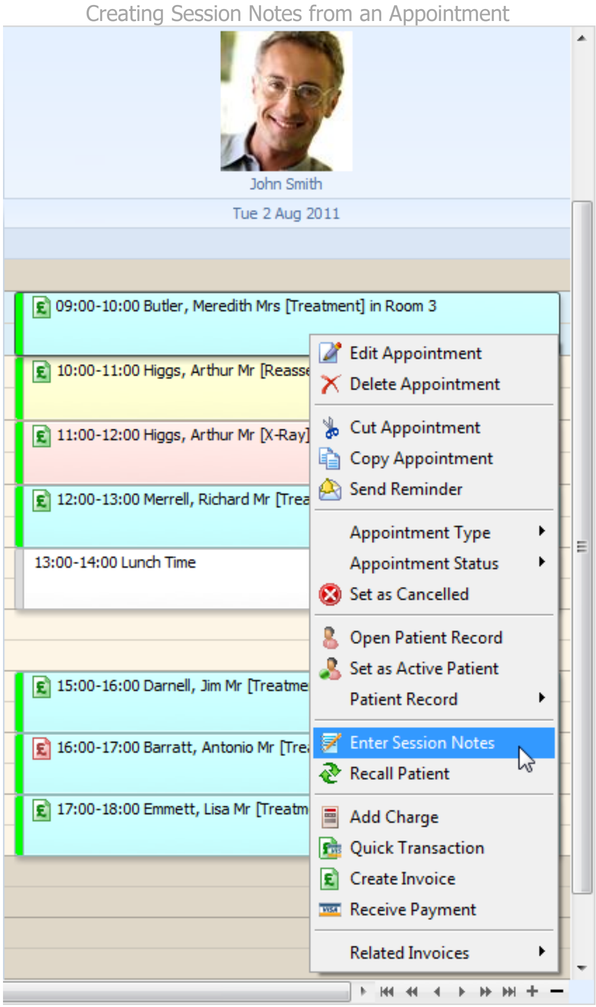


If you want, move an attachment such as a visual note and assign it to another session or case, simply left click on it in the Clinical Notes Navigator, then drag and drop it onto the desired session or case. You can assign a session to a case or note by using this method. By doing this you will affect the layout of the Clinical Summary for that patient.

Creating Cases and Session Notes

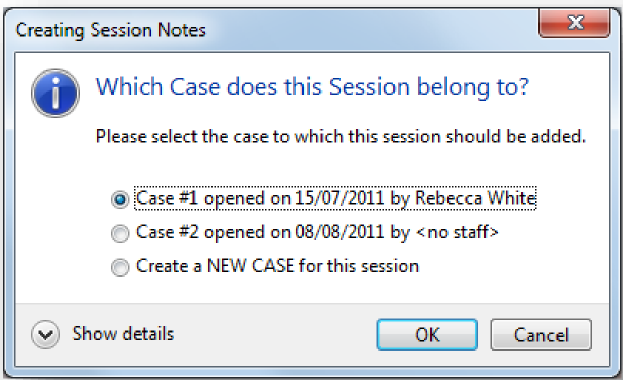
The most common way to create session notes is from the Appointment Diary. To create a session for an appointment, simply right-click on it then click **View Session Notes** as shown below:-

Creating Session Notes from an Appointment



When you create a Session Note for an appointment, ClinicOffice firstly needs to know which Case the session belongs to (please see the previous topic for more information), so a message will appear giving you the option to assign the Session Note to a Case or the option to create a new Case.

Case Selector



If the patient already has more than one Case, then select the appropriate one and click **OK**. If there are no Cases, then ClinicOffice will automatically create a new one.

By using this method to create a new Session Note, details such as **Date & Time**, **Appointment Type**, **Staff Member**, **Room** and **Clinic Name** will be automatically filled in. Also if you create a Case this way, then the **Case Opened** and **Primary Staff** fields will be filled in automatically for you as well.

You can also create a Session Note or a new Case when you are inside the Clinical Notes window.

Clinical Note Ribbon Bar

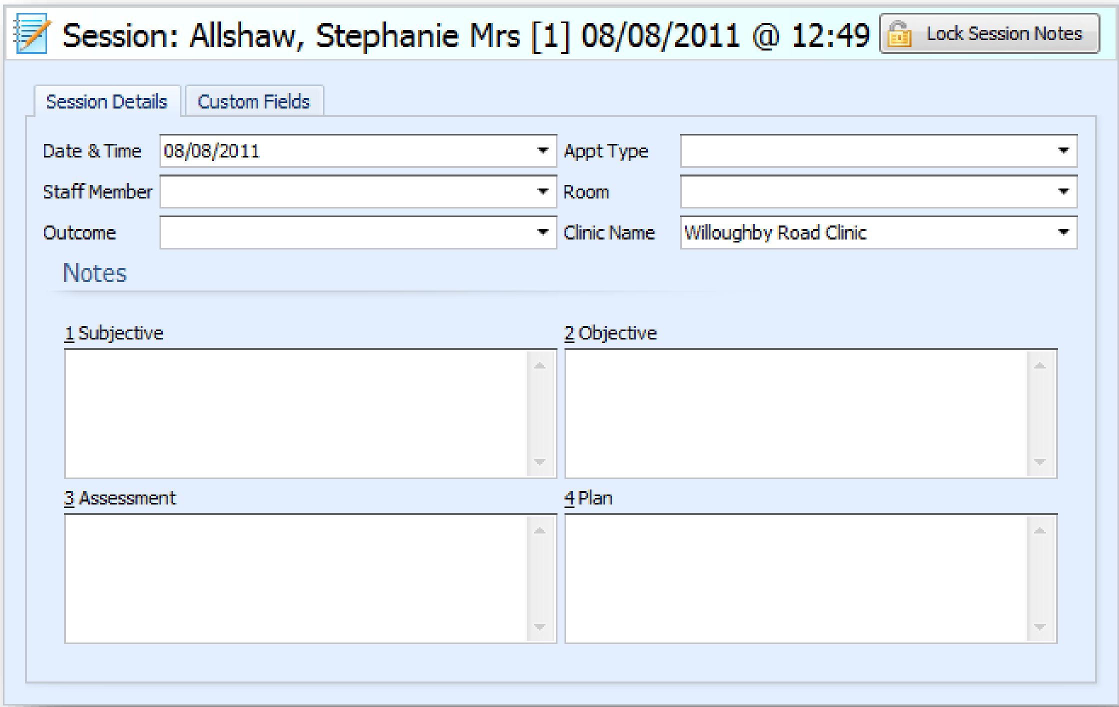
By clicking the **NEW** button on the ribbon bar, a small menu will appear allowing you to select either a new **Case Record** or **Session Record**. If you create a new record using this method, then certain fields do not generate any information that would have done using the previous method.

After selecting (or creating) the case you will then be presented with the Session Editor to enter the session details, this leads us on to our next topic.

The Session Editor

The Session Editor allows you to create, edit or modify session records.

The Session Editor



The session editor has two pages:

1. **Session Details**

   This page contains the main fields used to record session information. It contains the basic fields like the session's date and time, the session type, the patient and staff involved etc.

   There are also four notes you can use for clinical notes. By default ClinicOffice uses SOAP notes (Subjective, Objective, Assessment, Plan). You can stamp any of the 4 notes field with your name (whoever you are logged on as) the date and time simply by right-clicking and selecting **Stamp Notes**. Also via the right click menu you can select **Show Previous Notes** (shortcut is CTRL-H keys), which will open up a screen and will show you the previous notes for the field you have selected. From there you can select to copy those previous notes into the current note field if these are applicable for the current note.

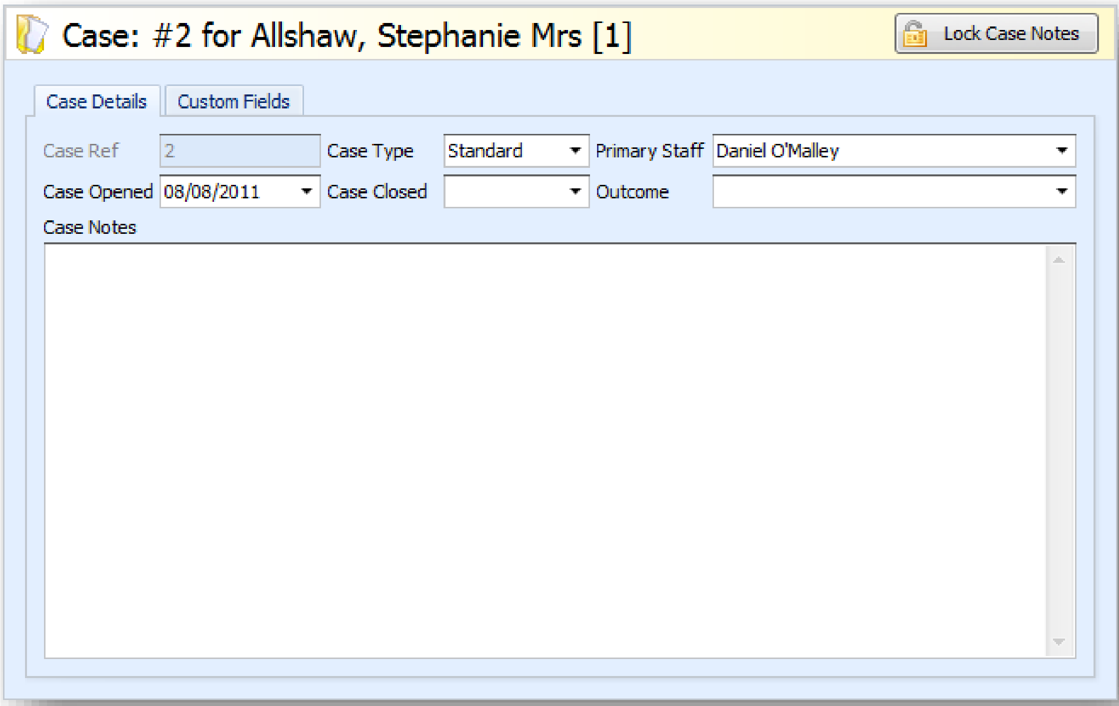
2. **Custom Fields**

   This page allows you to define additional custom fields that you would like to store for each session record. For more information on how to use custom fields, please see the Designing Forms topic.

The Case Editor

The case editor allows you to create, edit or modify a case record.

The Case Editor



The case editor has two pages:-

1) Case Details

This page contains the main fields used to record case information. The **Case Ref** is a unique reference which is auto-generated by ClinicOffice. You can use the **Case Type** to define what the case is for. For example, you could assign each case type as a body part; so, each case pertains to a different section of the body you are treating. The case type description will also show when assigning a session note to a case.

You can also use this screen to close a case, set the case outcome or enter case notes. Just like the session notes you can also stamp the case notes with your name, date and time.

2) Custom Fields

This page allows you to define additional custom fields that you would like to store for each case record. For more information on how to use custom fields, please see the Designing Forms topic.

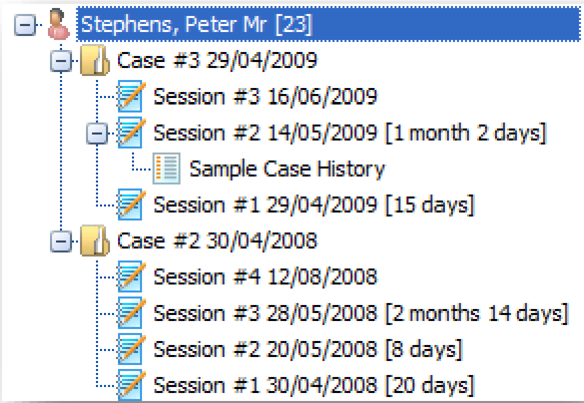
Attaching Additional Records

As mentioned previously you can attach a Clinical Form, Document/Image or a Visual Note to any Session or Case Note. To create one of these additional records, go to the ribbon bar (in the Clinical Notes) and click on the **Attach** button. Select one of the options i.e. Clinical Form.

This new record will attach itself to the Session or Case that you have selected at the time. You can move this, by left-clicking on the record in the Navigator and then dragging and dropping it on the desired Case or Session. If you do not want it to be assigned to any other record, then drag and drop it onto the patient's name which is at the top of the Navigator.

If you wish to delete a record, then left-click on that record once and press the DELETE button which is in the ribbon bar. You can also delete a Case or Session using the same method.

Attached Record to Session Note in Navigator



With Visual Notes you can import images, which can be edited in the same manner. You would do this by clicking on the **IMPORT FROM FILE** button which is in the bottom left of the Visual Note Templates window. For further information please see the "Visual Notes" section.

Printing the Clinical Summary

There are times when you need to print off a patient's clinical notes. Located in the top right-hand corner of the Clinical Summary window there are two buttons, the **Print Preview** ( ) and the **Send To Word Processor** ( ). These enable you to print off the clinical notes.

When you click the **Print Preview** button, this opens the ClinicOffice Print Preview window. From here you can choose to alter the size of the margins, the orientation and scale. You cannot alter the layout of the content from here. Once you are happy with things click the **Print** button (located top left on ribbon bar).

If you click the **Send To Word Processor** button, this will export the clinical summary to Word. With Word you have greater freedom to edit the content layout. This is recommended if the standard Print Preview is not displayed the way you want it. You can then print the summary from here.

Attaching/Viewing Other Document Types

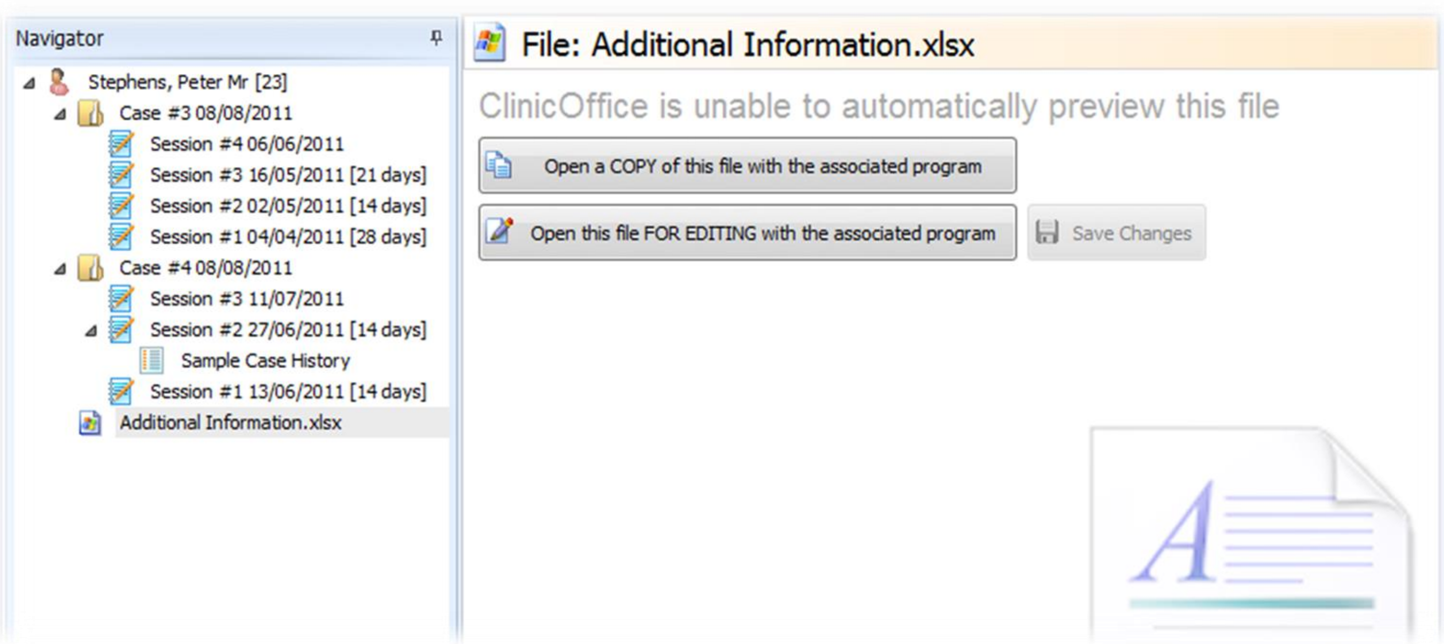
ClinicOffice can store any type of external document. If it is not an image or PDF file, then ClinicOffice will open it with your default program. For example, if you store a ".doc" file inside the Clinic Notes and go to open it, ClinicOffice will open it using your default word processor.

To attach a document that is not an image, follow the steps below:

- Go to a patient's Clinical Notes
- Click the **Attach** button on the ribbon bar and select **Document/Image**; the Attach Documents/Images window will appear
- By default, the file type will be set to search for image files only. Change this to **All Files (*.*)**
- Locate the document you wish to attach and open it

The document will be added to the patient's Clinical Notes. You may wish to move this to a Case or Session if it is not attached to the correct one (see "Attaching Additional Records").

Viewing Documents on the Clinical Notes



When you left click on the document ClinicOffice will state that it is unable to automatically preview the file (as it does in the image above). You will instead be provided with two options:

1) Open a COPY of this file with the associated program

This will open a copy of the document into its default program. This means that it is not the original from ClinicOffice and hence any changes made will not be saved to the same location. Instead you would have to save it to your computer hard drive and re-import it if you wished for the latest changes to be present in the patient's Clinical Notes.

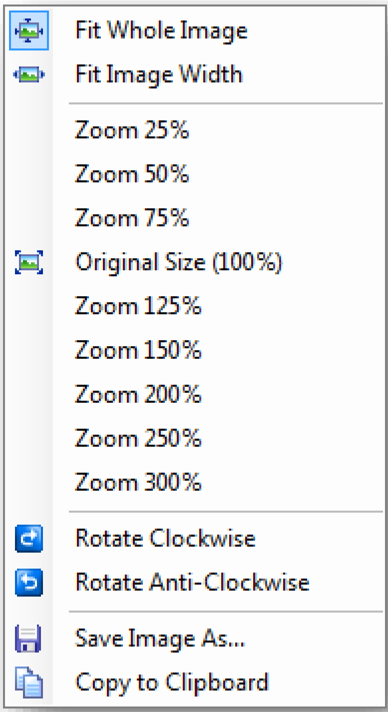
2) Open this file FOR EDITING with the associated program

This will open the original document that is contained in ClinicOffice. Any changes made to it can be saved straight back into ClinicOffice. This can be done by pressing the **Save Changes** button in ClinicOffice once any changes have been made to the document.

Viewing Scanned/Imported Images

When you scan or import an image into the Clinical Notes, such as a letter, you might find that the image is too small to read or that it is displayed landscape (instead of portrait). This can be annoying when you are going through the patients details and you must read the details on the image. ClinicOffice has some features to aid you with this problem.

Right-click on Image Menu



Assuming you are looking at an imported image inside the Clinical Notes Editor, right-click on that image and the menu to the right will appear.

At the top of the menu you have two options to **Fit Whole Image** and **Fit Image Width**. If you select **Fit Whole Image**, this will fit the image to the Image Area of the Clinical Notes. So, no matter how small you make this area, the entire image will fit in. If the image is smaller than the Image Area, it will stay at its original size. If you selected the second option **Fit Image Width**, this would only make the width of the image fit to the Image Area. If you alter the Image Area's height the image will not shrink.

The middle of the menu contains the zoom options. These range from 25% of the original image size to 300%. You can also zoom in if you left-click on the image and to zoom out press (don't scroll) the middle mouse button again on the image. You will notice that if the image does not fit within the Image Viewer then small window will appear.

Navigator Window

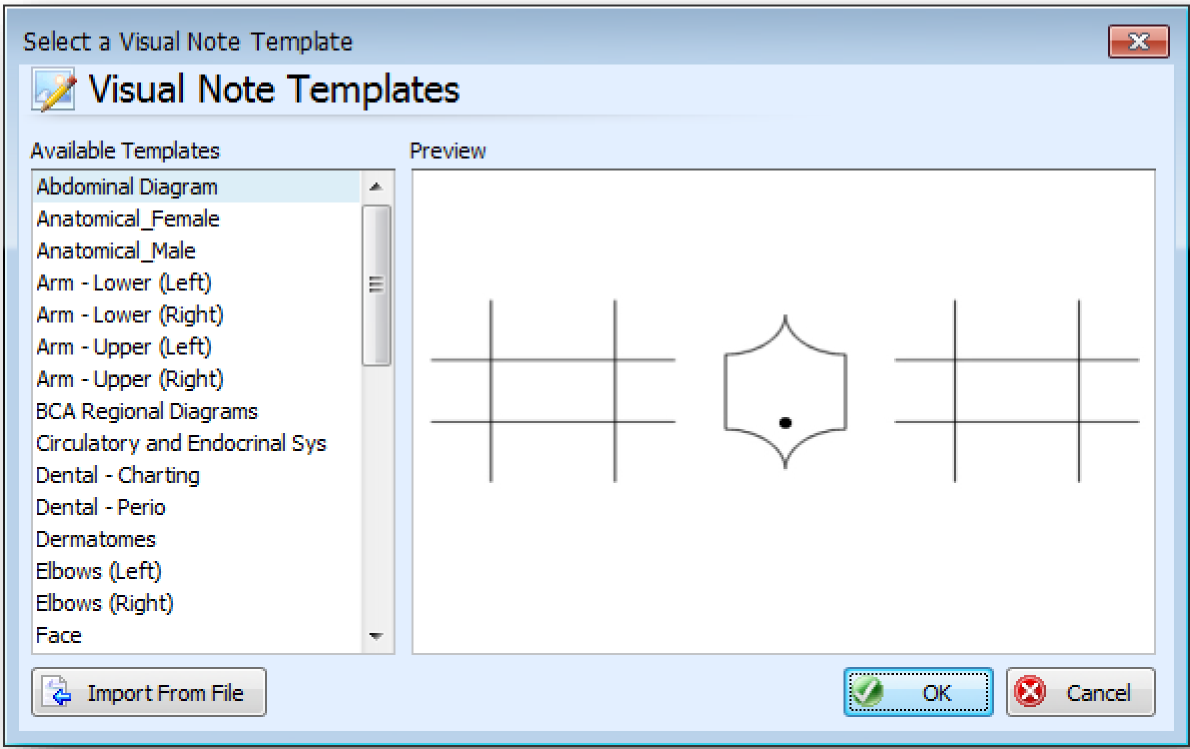
You will notice that part of the image in the navigator window is clear while another is tinted. The clear part is what you are looking at in the image viewer now. If you place your cursor on the clear section, you will notice it change ( ). Simply hold down the left mouse button when the cursor is like this and move it around. The focus of the image (in the Image Viewer) changes to whatever part you have highlighted.

You will also notice in the right-click menu a **Rotate Clockwise** and **Rotate Anti-Clockwise**. This enables you to change the orientation of the image to your liking. You can save the image as an external file by selecting the **Save Image As…**. If you wish just to copy and paste the image into another document, then you can select **Copy to Clipboard**.

Visual Notes

As mentioned previously Visual Notes is an additional module, which enhances your note taking. To attach a Visual Note, click the **Attach** button and select **Visual Note**. The following window will appear:

Visual Note Template Window



On your left hand side is your available templates. When you left click on one it will be previewed in the preview window on the right. You can rename or delete a template simply by right clicking on the templates and then selecting either **Rename** or **Delete**.

To import a new template simply click the **Import From File** button. Windows Explorer will appear allowing you open an image file (following formats are compatible: bmp, gif, jpg, jpeg, png or wmf). When you have found the image you wish to use click **Open**.

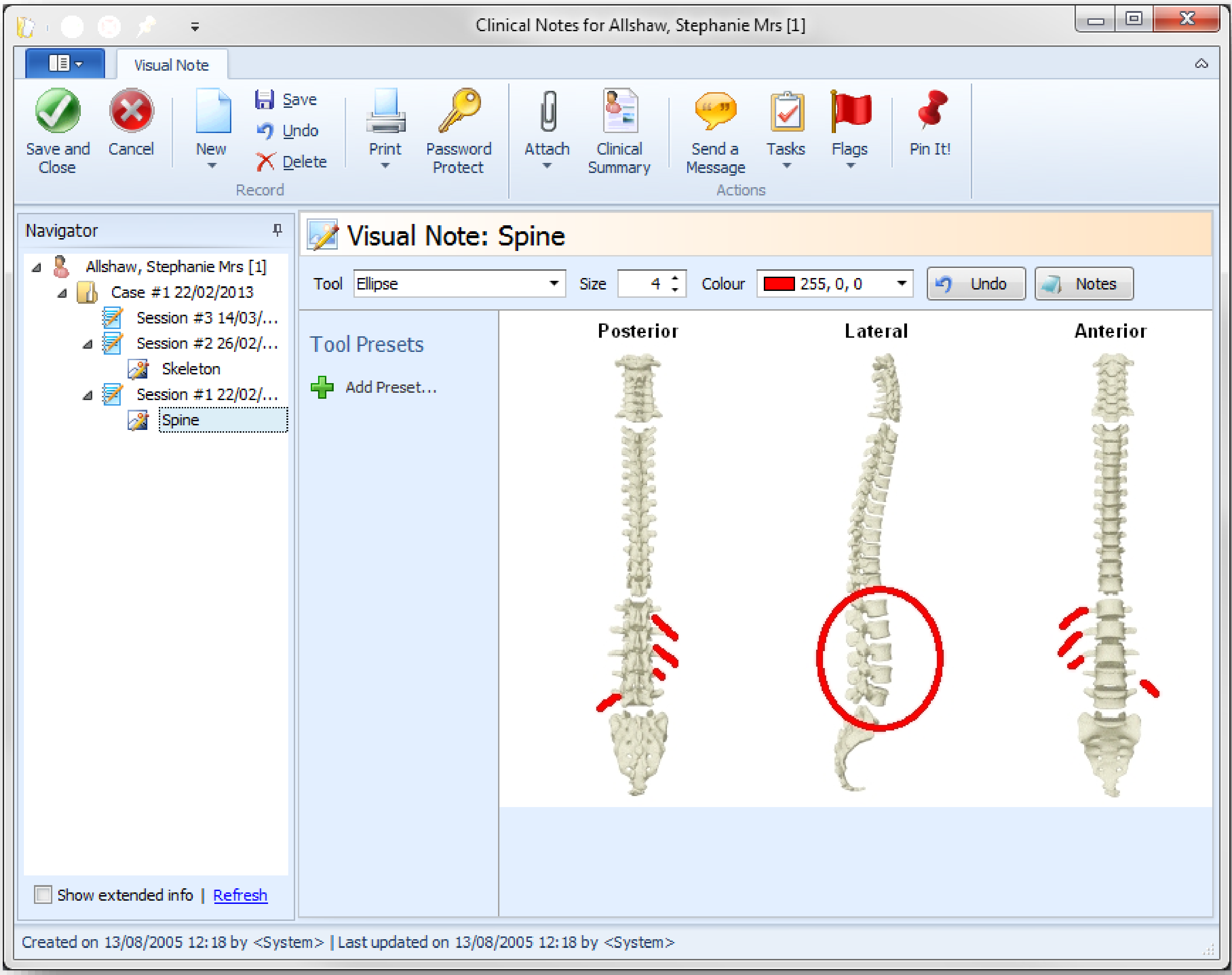
If the image is large ClinicOffice will notify you of about it and ask if you wish to reduce the size. You will be provided with four options:

Yes – Reduce the image size	This will reduce the size of the image this time ONLY.
No – do not change the image at all	This will not reduce the size of the image on this occasion.
ALWAYS reduce large images	Once selected ClinicOffice will always reduce the size of an image.
NEVER reduce large images	Once selected ClinicOffice will not check again the size of an image.

Once you have selected one of the options click **OK**. The image will now be imported and will be added to the available templates.

To insert the Visual Note into the Clinical Notes, select one from the left hand side and click **OK**. The Visual Note will be attached to the Patient Summary, Session Notes or Clinical Notes depending on what you had selected at the time. You can choose to reassign this if you wish; see the section "Attaching Additional Records" for more information.

When you select the Visual Note it will be displayed in the window on the right hand side of the Clinical Notes.



You will note that at the top of the image you have a small toolbar. The toolbar is broken down into the following sections:

Tool	Provides you with the Freehand, Rectangle, Ellipse, Line, Symbol-Circle, Symbol-Filled Circle, Symbol-Filled Square, Symbol-Cross and Symbol-Circle and Cross tool styles.
Colour	This allows you to select the colour that you wish your tool style to be in.
Size	This sets the size that the tool style will appear in.
Undo	This will undo the last change that has been made. Note that once you have saved the Visual Note you cannot undue any changes that had been made before.
Notes	Opens a separate Notes window so that you can store any additional information. This window does not appear automatically on opening the Visual Note.

There is also a **Tool Preset** feature within the notes. What this will do is allow you to save a tool along with its settings. So for example example if you like to mark regions of pain in the body with a red symbol-circle which has a size 3, then you can select the tool, size and colour and then click the **Add Preset** button. You can assign a name to the preset and click **OK**. So for future occasions if you need this particular tool with its settings, rather than selecting the tool, size and colour you can just click the preset and your settings will be automatically filled in.

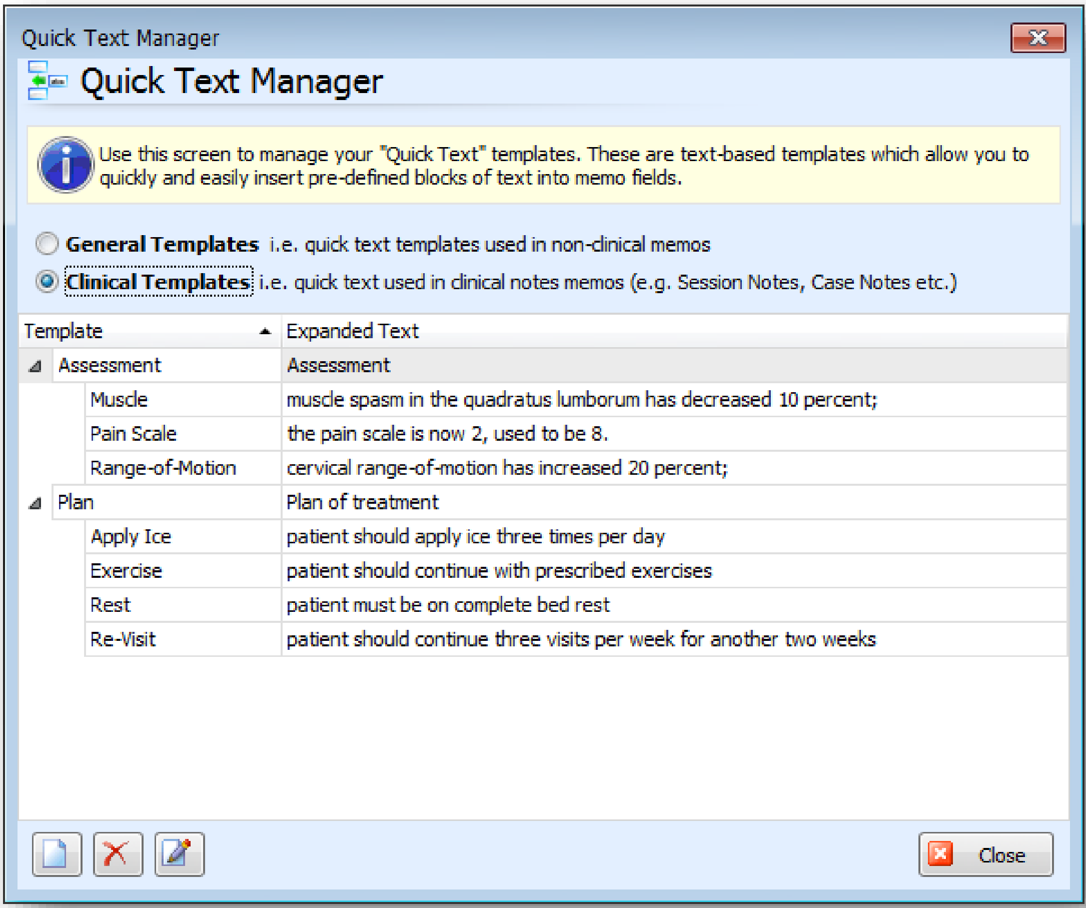
Remember to save any changes made to the Visual Note by clicking the **Save** button on the Ribbon Bar.

Quick Text Templates – For Clinical Notes and Memo Fields

Writing down comprehensive clinical notes or even general notes can take precious amounts of time and if you are running a busy clinic you do not always have time to spare. To aid you with writing out notes ClinicOffice has a Quick Text feature. The Quick Text will allow you to create templates that can be used in either the patient's clinical notes or within any other memo field such as in a journal log on the patient's record.

You can access the Quick Text Manager screen by going to the **Tools** menu and clicking the **Quick Text Manager** button**.** You can also access the same screen by clicking the **Manage Clinical Templates** button, on the **Design** tab, within the patient's clinical notes.

Quick Text Manager



The Quick Text Manager is broken down into two sections: **General Templates** and **Clinical Templates**. The General Templates, as the screen above suggests, are for notes in any memo field except for the clinical notes memo fields. The Clinical Templates are for notes within the memo fields of the clinical notes only.

Towards the bottom left of the screen are three buttons: **New Template**, **Delete Template** and **Edit Template** (in that order). These options are also available when you right click on the main grid section. There is also a fourth option on the right click menu which is **New Sub-Template**. A sub template is the same as a normal template but it can be grouped under an existing template. A sub-template will also require another template to be assigned to. This is one way you can organise your notes by placing them into groups and sub groups.

When you click to create a new template the Quick Text Editor will appear. This window has two fields: **Template Name** and **Expanded Text**. The template name is merely a title for the given note. The expanded text is what will appear on the memo field when you select to add the text template.

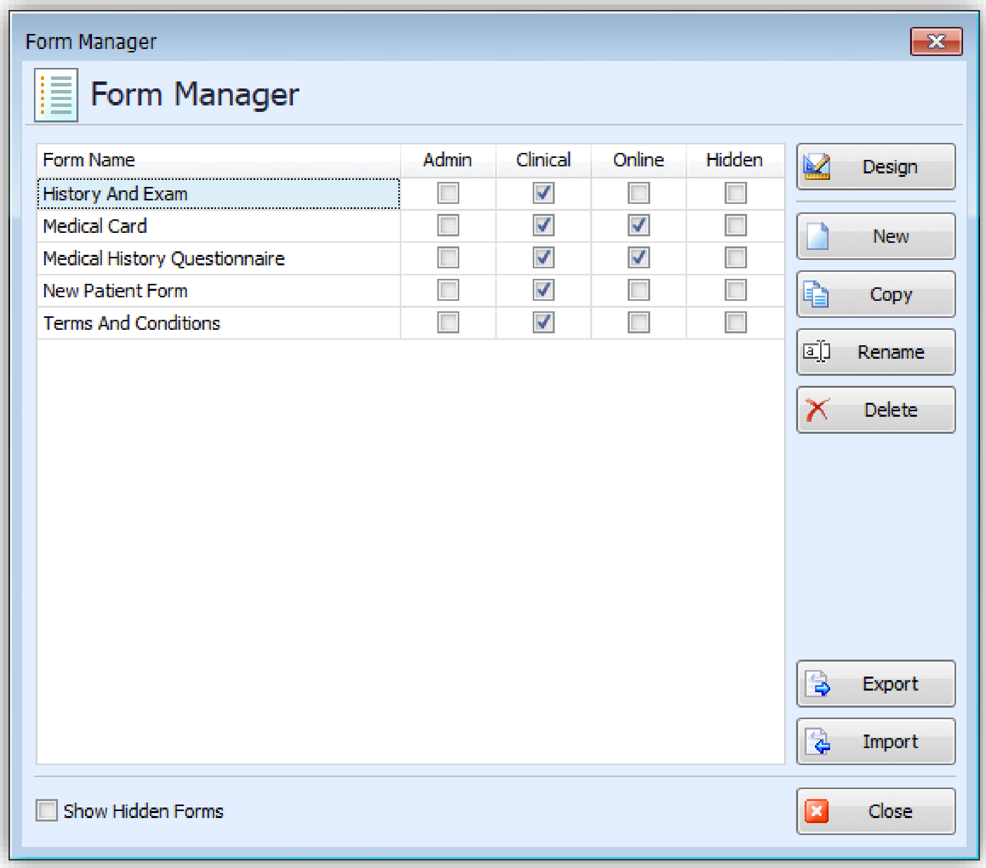
To add a quick text template to any memo field, for example the Subjective field within a session note, right click on the field and select **Quick Text**. Alternatively you can left click on the memo field and press the **Ctrl** and **Space** keys together. A new menu will appear allowing you to select anyone of the respective templates and sub-templates. You can search on the template name by typing into the search field which will be at the top of the menu. Once you have located the template you wish to insert, just double click on it. The template text will be inserted wherever your cursor happens to be on the memo field.

There are two additional buttons just right of the search field which will allow you collapse the list of templates so that you can only see the top level templates or to expand the list of templates. At the bottom of the menu is also the link **Quick Text Manager** which will take you back into the main Quick Text Manager window.

Designing Forms

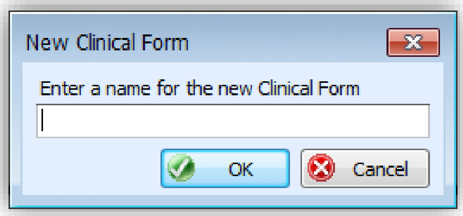
ClinicOffice implements a versatile system for designing forms. To create a new form or edit an existing form, click the **DESIGN CLINICAL FORMS** button located on the ribbon bar under the **Tool** menu. This brings up the Clinical Form Manager.

Clinical Form Manager



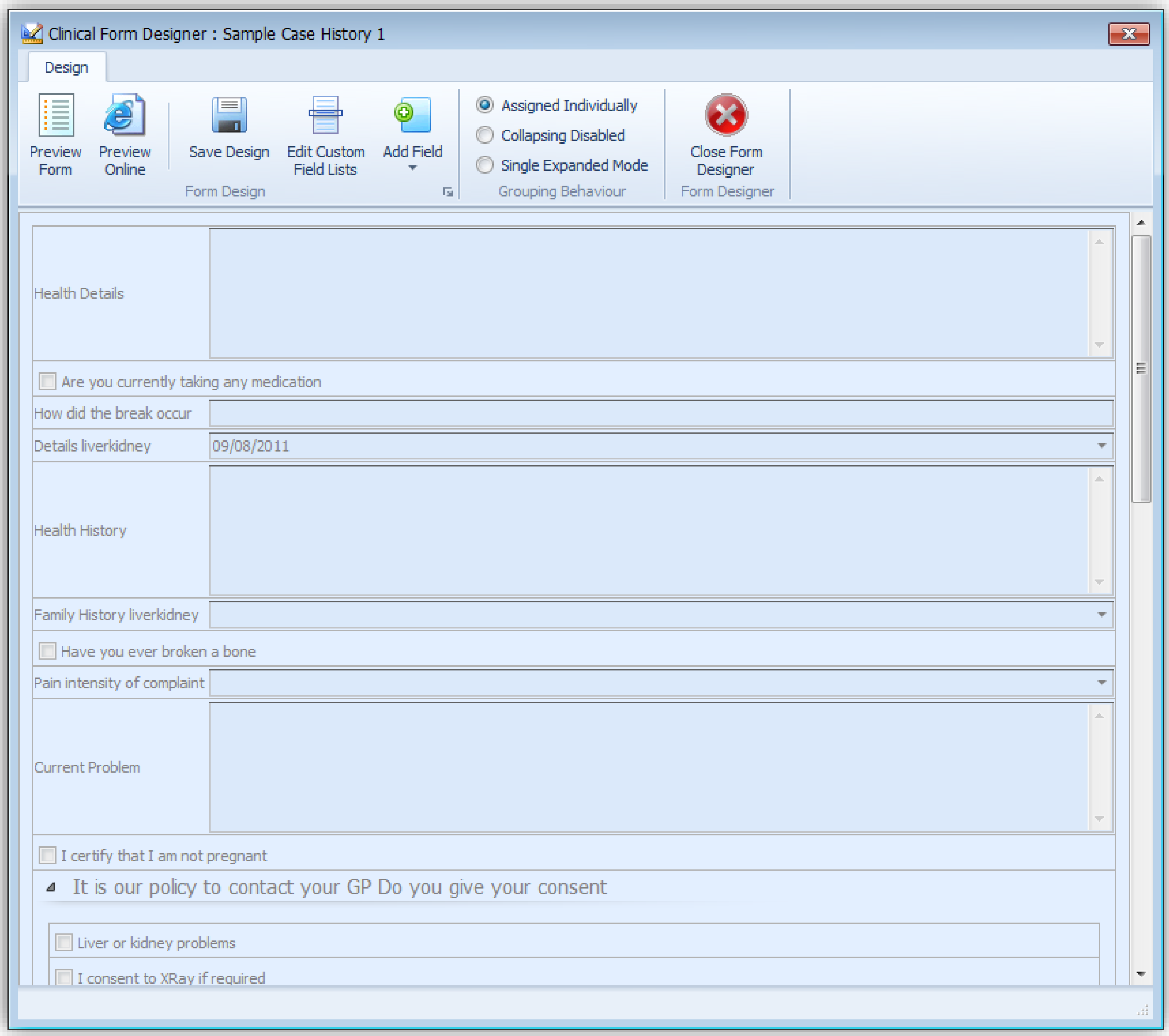
1) Click the **NEW** button, to create a new form.
2) Enter the name of the form and click **OK**.

New Clinical Form Name



3) The form will now appear in the Clinical Form Manager. To edit this form, double-click on the form name and this will bring up the form designer.

The next few pages will now go through some of the components of the form designer and what each part does. Then it will look at adding new fields, organising them and then grouping them.



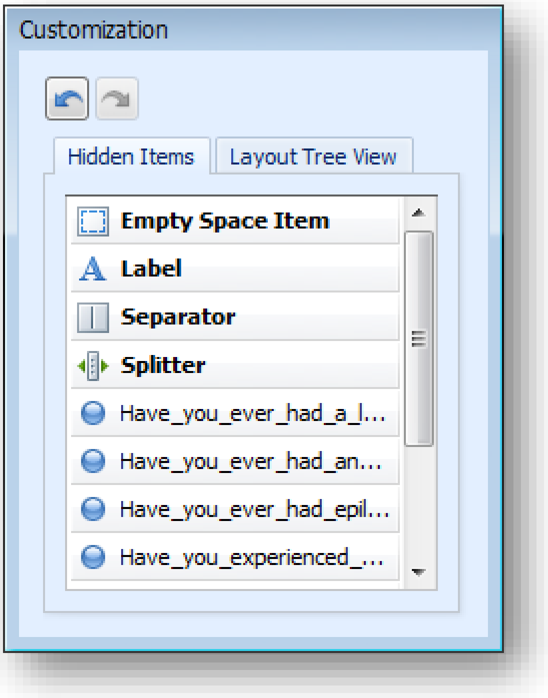
The ribbon bar on the form designer lets you add/edit fields on the form. Below is information about the components on the ribbon bar.

Preview Form	This allows you to preview the form as you would see it in the Clinical Notes, and you can test it by entering information in (information that you enter here will NOT be saved). Clicking on this again will allow you to return to the design mode.
Preview Online	This option is only available if the Online option is ticked within the Form Manager. This will preview how a form would be displayed via the E-Docs service in a web browser. For more information, please see the section "Online Forms and E-Docs".
Save Design	This will save any changes that have been made to the form.
Edit Custom Field Lists	You can create/edit/delete the custom field lists from here.
Add Field	This gives you the option to add Text, Memo, List, Checkbox, Date, Number and Decimal fields to the form.
Close Form Designer	This will close the form designer. If you have not saved the changes you have made, then it will ask you if you want to save the changes made.

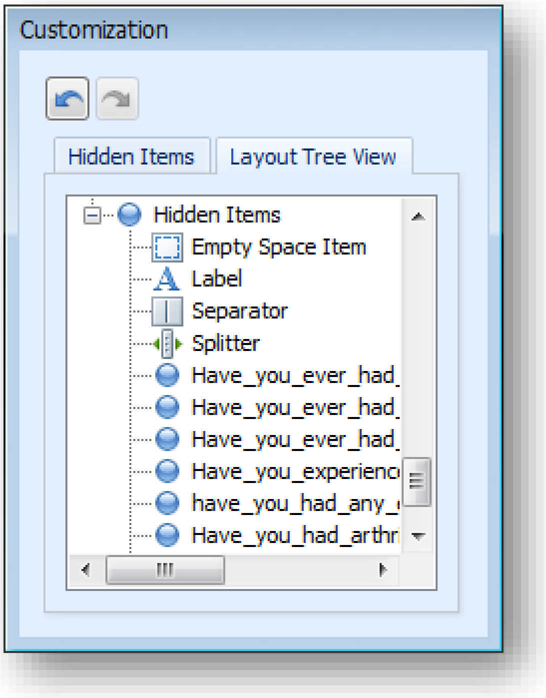
Customization Window

The Clinical Form Designer also has another part to it that enables you to edit the form further. This is the Customization window.

Customization Hidden Items



Customization Layout Tree



The Customization Window is broken down into two sections:-

Hidden Items

The Hidden Items of the Customization window stores the new fields that you have created (if you have selected an area in the form designer the new field will be added there instead). From here you can left click and drag the field into the desired location on the form designer.

This area also allows you to insert an Empty Space Item, Label, Separator and Splitter field into the form designer. These fields are always present in the Hidden Items list, as additional attachments. Each of these fields has a purpose and they are as follows:-

Empty Space Item	This creates a space between fields. When additional fields are added to the form, this space reduces in size (when the form is full the Empty Space Item will have a minimum set size). This can be useful when align fields.
Label	This allows you to create a custom label, this behaves like a data field but does not have any of its own functionality.
Separator	This is a thin line that separates the fields and will be displayed on the form in the clinical notes.
Splitter	This is like a separator but is more prominent in its appearance.

Layout Tree View

The Layout Tree View of the Customization window displays the full contents of the form, including the hidden items in a tree layout. The tree is first organised by the Layout Control Group, this is broken down into groups and tabbed groups. Each group will have field(s) assigned to them.

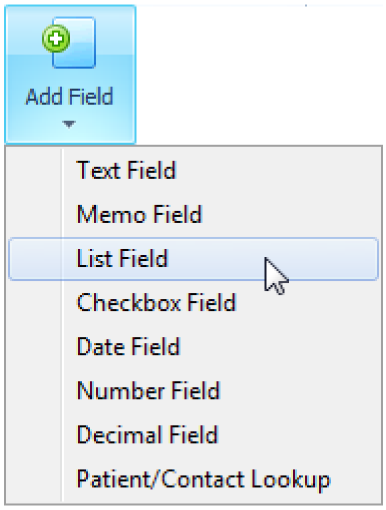
The layout tree has virtually the same functionality as the Clinical Form Designer, minus the visual display. For example, if you were to right-click on a field, you will have the exact same options presented to you as you would in the Form Designer.

The Customization window also lets you Undo  and Redo  any changes you have made to the position of the fields. It does not undo/redo the addition of a field or any changes made to the field name. Once the design of the form has been saved the changes made before the save cannot be undone using the **UNDO** and **REDO** buttons, only changes made thereafter will be affected.

Adding a New Field

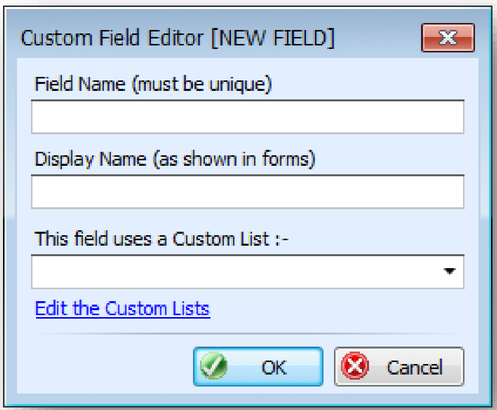
To add new fields, click on the **ADD FIELD** button. You will be presented with a drop-down menu with the following list: Text Field, Memo Field, List Field, Checkbox Field, Date Field, Number Field and Decimal Field.

Add Field Menu



Text Field	A text field allows you to enter an alpha-numeric value as a form.
Memo Field	While a simple text field only gives you one line of text, a memo field lets you enter several lines of text.
List Field	This type of field lets you define a list of answers and then select an answer from that field list.
Checkbox Field	Checkbox fields are represented by a tick box on the form. The tick box gives you the choice of a 2 or 3 state tick box. The 2 state has the options of ticked and un-ticked. The 3 state includes an unspecified option (represented by a square).
Date Field	A date field lets you select a date for the field's value.
Number Field	A number field takes a numeric value which must be a whole number.
Decimal Field	A decimal field takes a numeric value which can include a decimalised figure.
Patient/Contact Lookup	This is the standard search field, which is present in the appointment editor, which searches through your database for the desired Patient/Contact.

Creating a Custom List Field

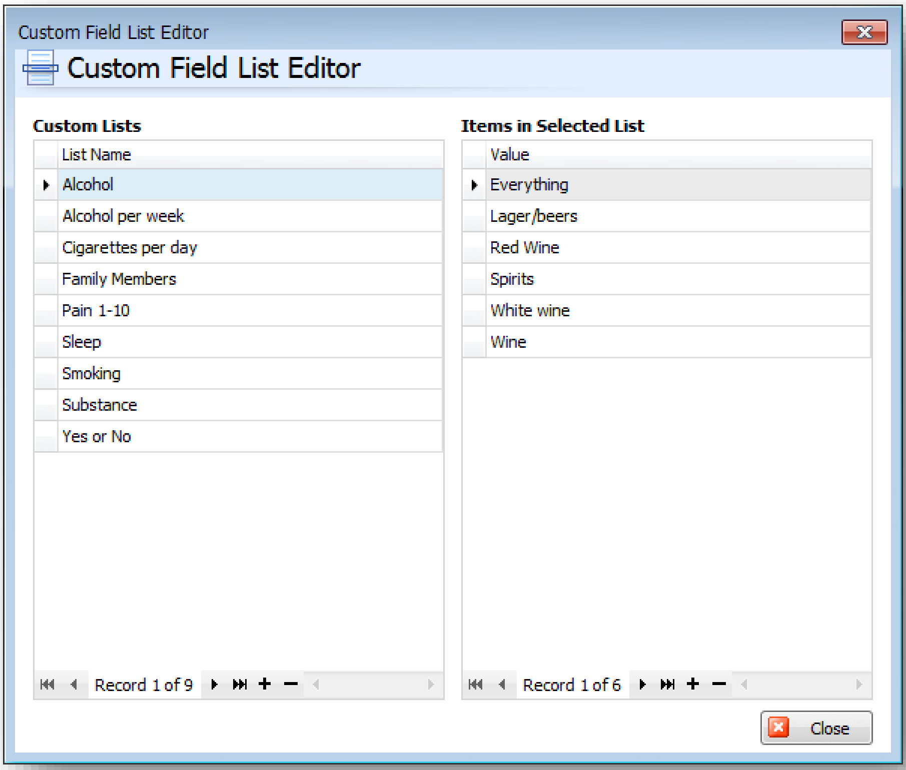


Once you have selected one of the fields, i.e. the **Text Field,** a small window will open up allowing you to enter the Field Name (this is the unique name of the database field) and the Display Name (this is shown in the form). This is so that you could have four fields for example, all called Description on the form (Display Name is called "Description") while the underlying Field Names would have to all be different (i.e. "Description1", "Description2" etc.). Once you have entered the two names press **OK**. This is the same for all fields except one, which is the **List Field**.

If you choose the **List Field,** you will be presented with a window like the one to the left.

With this you will enter the Field Name and Display Name in the usual manner. You will then select the custom list you wish to have. Each list will have items; once the custom list field has been created the items will be displayed in that list. To edit or create a custom list, click on the **Edit the Custom Lists** link from this window. You can also click **EDIT CUSTOM FIELD LISTS** button, on the ribbon bar in the Clinical Form Designer window, to do the same. The following window will appear: -

Custom Field List Editor



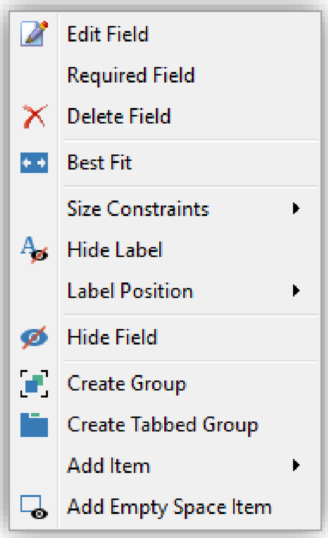
The left-hand column contains the custom list's name; the right-hand column contains the items or contents of that list.

To add or remove a list or item press the + or − buttons in the respective columns, then enter the necessary details into the field. Once you are satisfied with the changes made, click the **CLOSE** button. You can use a newly created list, in the Custom List Field window and then press **OK,** to insert the field into the Form Designer.

Form Designer Right-Click Features

Quite a few of the Form Designer's powerful features are contained within the right-click options. If you right-click on a field the following menu appears: -

Right-Click Field Menu



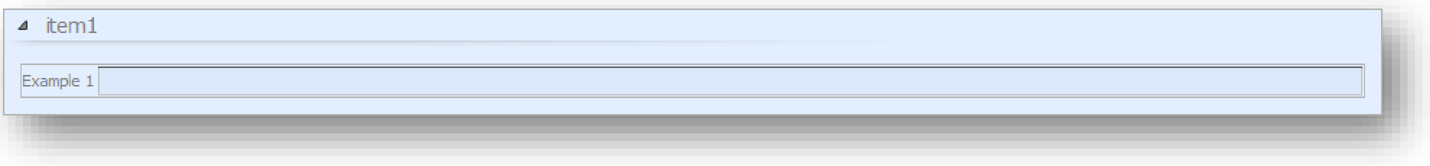
Edit Field	This allows you to rename and edit any of the field's properties.
Required Field	Use for Online Forms and makes this field mandatory and must be filled in by the patient.
Delete Field	Deletes the field completely. **NOTE**: past data entered in this field will be erased.
Size Constraints	Gives you the option to lock the size of a field, meaning you cannot alter the size. Also, the option for free sizing (removes the lock on size).
Hide/Show Label	Hides or shows the field name in the Form Designer.
Label Position	To select this option, the field that you have selected must be showing the field name. This gives you the option to place the field name at the top, bottom, left and right of the field.
Hide Field	This removes the field from the Form Designer and places it into the Customization window, Hidden Items menu.
Create Group/Tabbed Group	This groups a field under a heading. Additional fields can be added to a group.
Add Item	Allows you to add a label, separator, or splitter item.
Add Empty Space Item	Adds a blank space item.

Grouping and Tabbing

To organize and structure your form you can group fields. These groups can be made into tabbed groups. This also helps to structure the display in the Layout Tree View on the Customization window.

To make a group, right-click on a field in the Clinical Form Designer, then select **Group**. This puts the field into a blue box, with the group name being displayed just above the field, just like the following example: -

Grouped Field



The default group name will be something like 'item1'. You can rename the group, by right-clicking on the group name and selecting **Rename**.

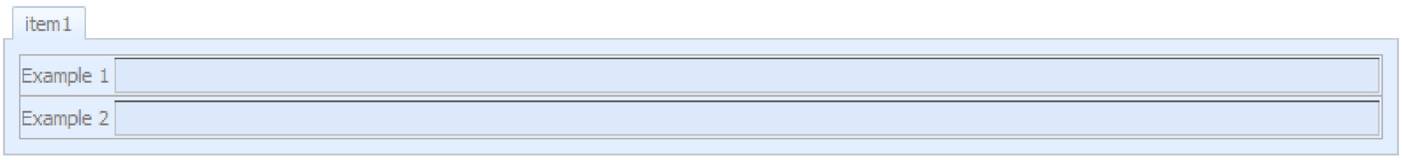
To add an additional field, left-click on a field (outside the group) and drag it underneath the field that is already grouped. Move it until you have a small black outlined rectangle box appear, you can now drop it there.

Adding an Additional Field to Group

You can add as many additional fields to the group as you like using this method. An alternative method to this, is to select several ungrouped fields by pressing the Shift button and left-clicking on each field you wish to add. Right-click on one of the fields and select **Group**. This will group all selected fields. This method will only work if all selected fields are connected to each other.

To turn a group into a Tabbed Group, right-click on the group name and select **Create Tabbed Group**. It should look something like this:-

Tabbed Group



You can rename the new tabbed group the same way you would a group. You can also add another tabbed group to this, by selecting a new group then dragging the group name until a small black outlined box appears. Then dropping this next to the present tabbed group.

Adding an Additional Tabbed Group

One group can have several sub groups, just as one tabbed group can also have several groups attached. This is how the form is organised into categories and sub-categories. To do this, just drag the desired group and like a field place it into another group and drop it there.

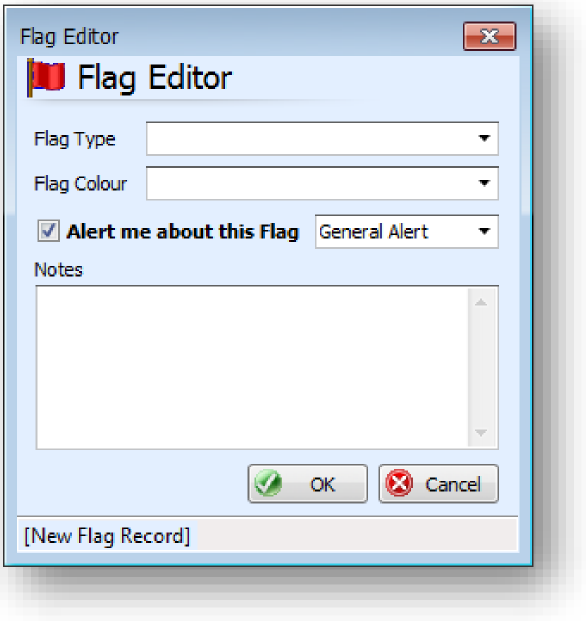
Flagging

ClinicOffice employs a powerful flagging system. You can create as many flag types as you want, and then attach them to virtually any record to act as reminders, alerts or to identify a group of patients for any purpose you wish.

Tip: *To edit the Flag Types, click the **View** menu from the main ClinicOffice window, then click **Types & Categories** then click **Flag Types**. This shows you a list of all the current flag types. You can add, edit, or delete flag types using this screen. (See "[Working with Types and Categories]" topic for more information.)*

To flag a patient's record please follow the example below:

Flag Editor Window



- Open a patient's record; click **FLAGS** on the ribbon bar. This brings up the Flag Editor window.
- Select the **Flag Type** you want to attach to the patient's record. (You can add a new flag type by clicking the category button which is at the bottom of the menu.) Select the **Flag Colour**.
- By default, the box **Alert me about this Flag** will be ticked which will make this flag into an alert. When a flag is put on alert it will pop up whenever a patient record is accessed. If you do not want this just un-tick the box.
- Enter any **Notes** if you wish.
- Click **OK** to attach the flag.

ClinicOffice will now create and attach the flag to the patient's record. You can see the flag by going into the patient's record and clicking on the lower part of the **FLAGS** button. Then click on the flag you wish to see.

Alternatively, you can flag a patient's record by right-clicking on the record, selecting **Patient Record** and then clicking **Flag Record(s)**. This opens the same Flag Editor window (as seen in the previous picture).

You can also attach flags to any of the editors in ClinicOffice. When you go to add a flag to an appointment, invoice, payment, credit note or refund you will be presented with the following three options:

1. Flag this Record
2. Flag the patient/contact Record
3. Flag both this record and the associated patient/contact's record

Within the Diary Options there are two options: **Show related alerts** and **Show related flags**. If an appointment or patient has been flagged and you tick the **Show related flags**, you will be able to see a small flag icon on the related appointment. You can also specify the flag types that you wish to be displayed.

If the flag that is assigned to an appointment or patient has an alert on it then this can also be displayed by ticking the **Show related alerts**. This will display a small red light on the related appointment. Again with this you can specify the type of alert to display from the Diary Options.

Flag Search

Except for the reports, all grids have the Flag Search feature. If you assign a flag to a record and you wish to locate that record in the future, this will help you search for it in a matter of seconds. Follow the example below: -

- Go to a grid i.e. The Patient Grid.
- Click the arrow on the **Search** button and select **Flag Search**. This brings up the following window.
- Select and tick the flag type(s) you wish to see.
- Press **OK**.

If nothing appears, then that means there are no records with that flag type assigned to it. If you have assigned a flag to a record and do a search upon this flag type, then the record will show. This applies for all types of flag searches.

Removing Flags

After a certain time, the flag that you have assigned to a record would have served its purpose and will be no longer needed. To remove a flag, go to the record which has the flag attached to it. Click on the arrow pointing down on the **FLAGS** button and then click on the flag you wish to remove. The flag editor will appear; now click on the 

button. This will permanently delete the individual flag.

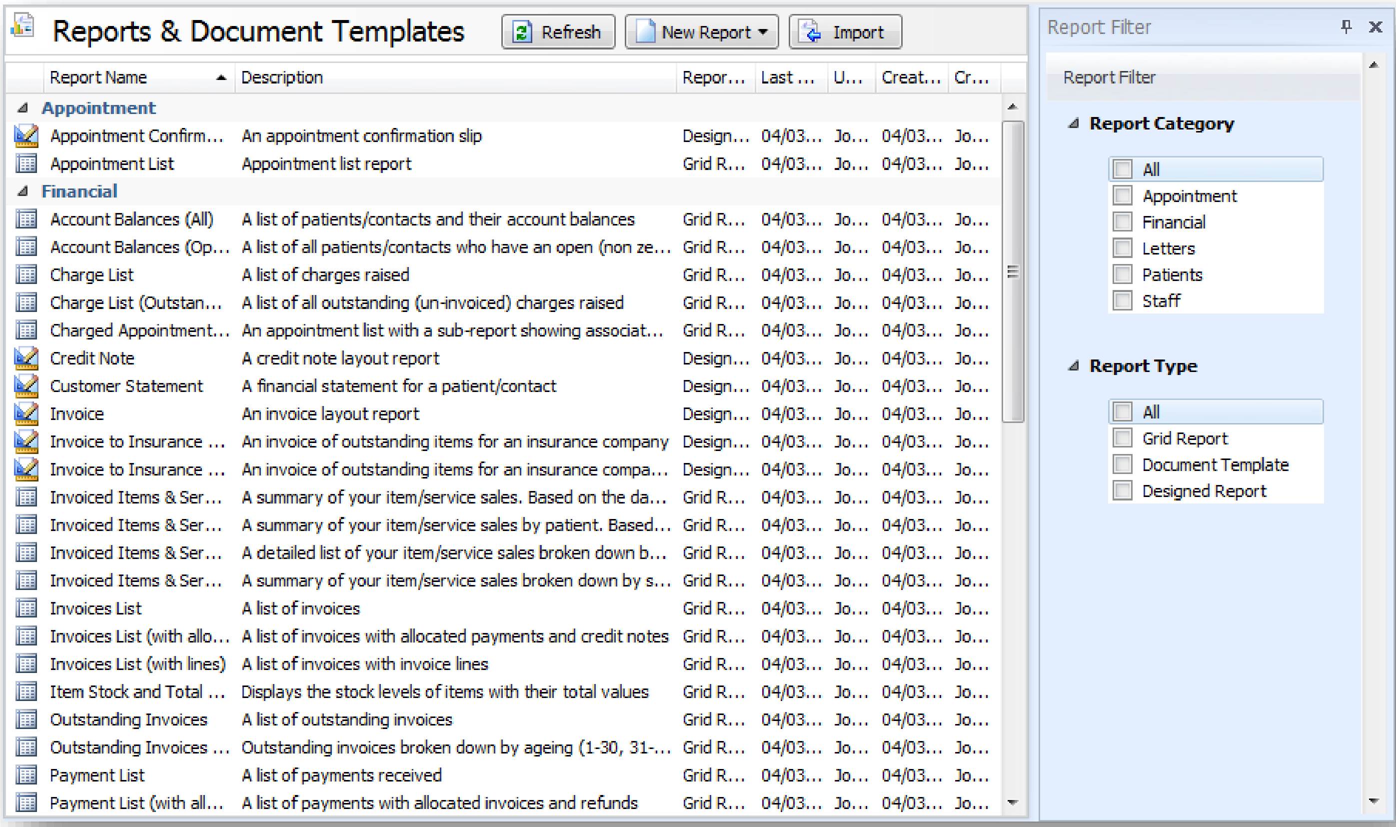
If you have multiple flags assigned to one record and you want to remove them all, click on the downwards arrow on the **FLAGS** button and then at the bottom of the menu click on **Remove all Flags**. This will delete all flags permanently. Of course, you can always use this method to remove a single flag as well.

Reports and Document Templates

The reports and document templates part of the program allows you to generate, preview and print out reports/documents about your clinic. You can access this from your home page (the bottom middle button) or by clicking on the button in the ribbon Bar.

This will bring you to the Reports and Document Templates centre. Unlike previous versions of ClinicOffice we now use 4 different types of reports.

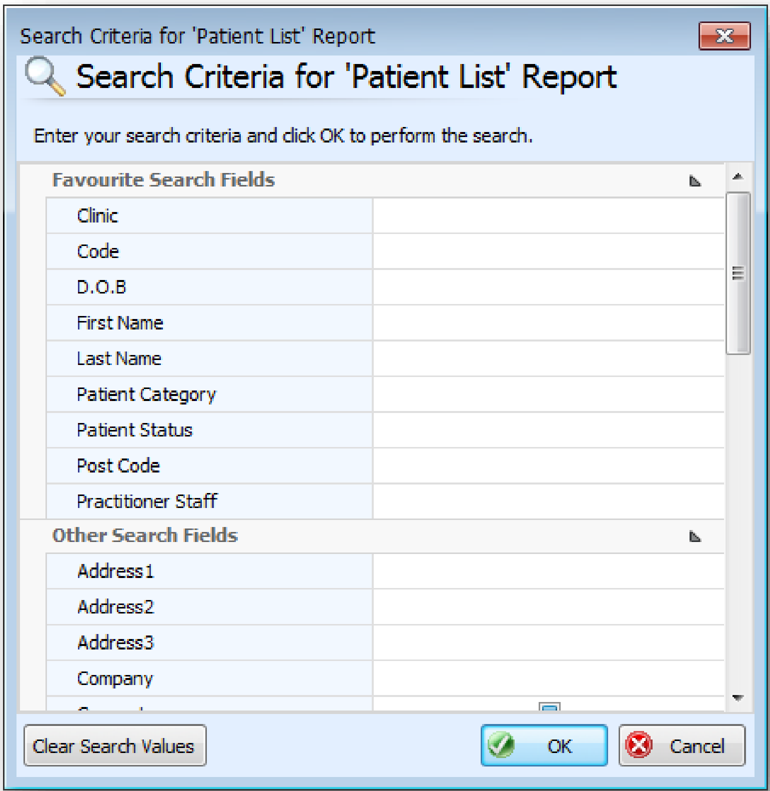
- Charts — Our charting module can add virtually any type of chart to virtually any grid within ClinicOffice, which enables eye pleasing instant reports.(For more information see the 'Charting' section of this manual')
- Document Templates — This is where you design all your mail merge letters and insert all your headers etc.
- Grid Reports — These are very much like Excel style reports which use the ClinicOffice grids to allow extra functionality.
- Layout Reports — These are the reports that you will use if you want complete control of the look and feel of the whole report. For instance, the Invoice Report. You can now add your own headers in with relative ease.



You can see in the left column, the different report categories. These can be changed in the Types and Categories Editor. In this screenshot we have used the <All Reports> option so we can take a look through all of them.

Running a Report

To run a report, simply double-click on the chosen report and the following screen appears.



You will recognise the search criteria box as it is the same as all other full search boxes within ClinicOffice. And it lets you set the criteria for which records you want to include in the report. You will also notice that you are able to nominate the fields that you use the most as favourite.

Clicking the **Other Search Fields** allows you to use more fields if it is needed (as shown above). If you wish to add a field to the list of favourites simply right-click and select **Add to Favourites**.

Once you have selected the criteria for the report, you will notice at the bottom of the window there are a few other options:-

Clear Search Values	Clears all the data from all search fields on this screen
OK	Creates the report using the criteria you have chosen
Cancel	Closes the screen

From here each report type works slightly differently to each other. We will start with how to create a new report, then go onto the components of each report or template and from there how to edit each report.

Creating a Report or Document Template

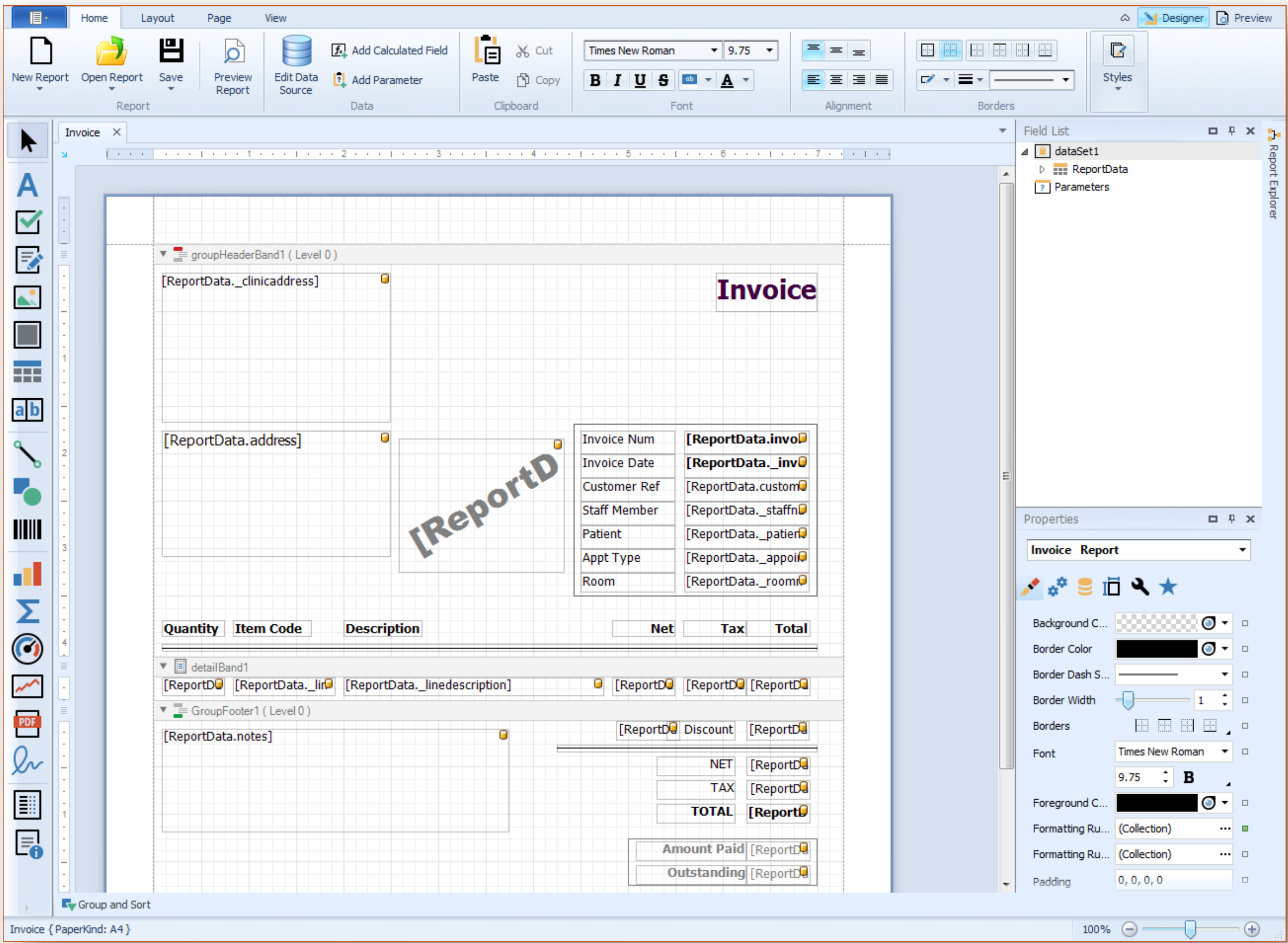
Please note that we do not actually recommend creating new templates from scratch as this requires a bit of knowledge of SQL (Structured Query Language). Instead, we recommend copying an existing template (preferably one that is close to the report that you would like to design) and then renaming it and editing the copy.
To do this, please follow these **three steps** below: -

1. Select your chosen report and right-click on it
2. Click **Copy** and you will notice that a new template called '**(Copy 1)**' has appeared
3. Right-click on this copied report, click **Rename**, **e**nter your chosen name, and then click **OK**

Layout Reports

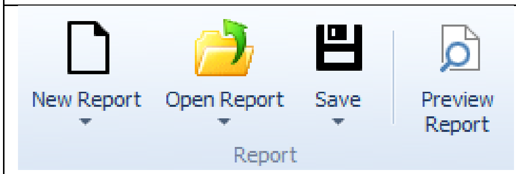
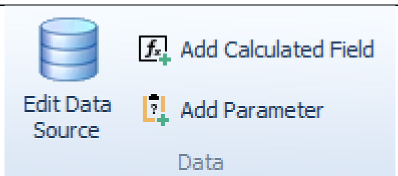
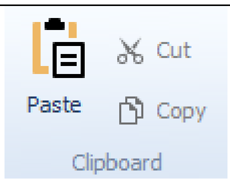
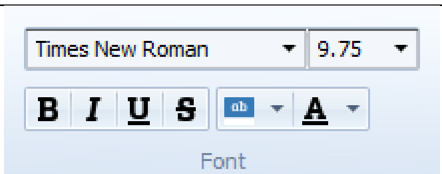
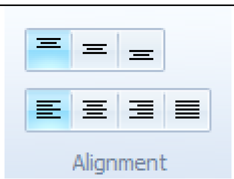
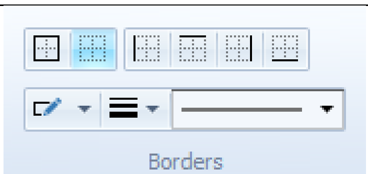
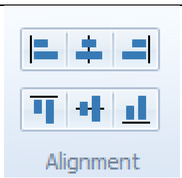
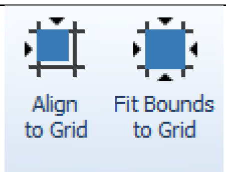
To edit a layout report, right-click on your report and select **Design Report**. You will then have the window below appear. If you wish to create a new document, please follow the steps in "Creating a Report or Document Template" and then carry on following this section.

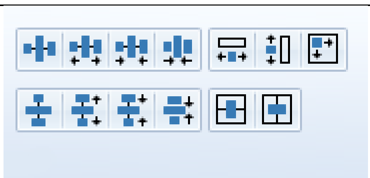
Invoice Report Designer



This is the main screen of the layout report designer. As you can see it looks quite complex so we will go through the basics. If you prefer to get straight into editing the layout report, please feel free to skip to the section "Adding New Components to a Layout Report".

First, we will look at the ribbon bar and all the controls that it offers.

HOME	
	**New Report:** Starts a brand-new report either from scratch or using a wizard [not generally recommended]. **Open Report:** Allows you to open other layout-based reports. **Save:** Saves the template (If you click on the arrow it will allow you to save the document under a different name using the **Save As** option). **Preview Report:** This will open the Search Criteria window that will allow you to perform a search on the report. From here you can see if your report is appearing how you want it to.
	**Edit Data Source:** Allows you to change the SQL source code that the report uses [advanced users only].
	**Paste / Cut / Copy:** These work the same as any other windows program. Allowing you to move or replicate highlighted text.
	**Font:** Click here to change the font type. If you are using a local install of ClinicOffice then this will display all font types that Windows installation has available. **Font Size:** Displays current font size and allows you to adjust it **Bold / Italic / Underline / Strikethrough** **Background Colour:** Adjust the colour behind the text **Foreground Colour:** Adjust the colour of the text
	**Alignment:** Align text to the top, middle or top on the vertical line and to the left, centre, right or justified within the horizontal line.
	**Borders:** Add or remove borders on the selected controls such as labels or calls within a table. **Border Colour:** Set the colour of the border of the selected control **Border Width:** Set the border width of the selected control **Border Style:** Set the style of border such as line, double line, or dashes
LAYOUT	
	**Alignment:** This can be used when multiple controllers are selected, such as multiple labels. You can align them to the left, centre, or right on the horizontal line and top, middle, or bottom on within the vertical line.
	**Align to Grid:** When selected **Fit Bounds to Grid:** Aligns the current control such as a label to the report's background grid.

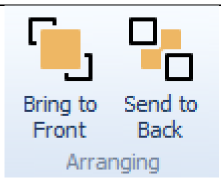


The below features only work when you have more than one control, such as a label or rich text field, selected.

- Make horizontal space equal
- Increase horizontal spacing
- Decrease horizontal spacing
- Remove horizontal spacing
- Make same width
- Make same height
- Make same size (this applies to height and width)
- Make vertical spacing equal
- Increase vertical spacing
- Decrease vertical spacing
- Remove vertical spacing

The next two features can work on multiple or singular controls.

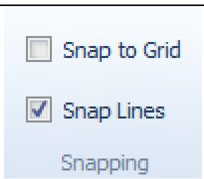
- Centre the selected controls horizontally
- Centre the selected controls vertically



These can be used when you have multiple controls stacked on top of each other.

Bring to Front: This will bring your selected label or other control forward by one place.

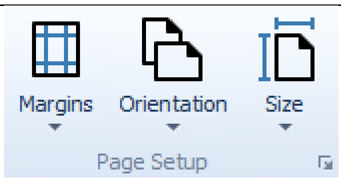
Send to Back: This will bring push your selected label one place behind another label.



Snap to Grid: When ticked label controls are automatically snapped to report's background grid when moving them.

Snap Lines: Provides guidelines based on the position of other controls such as labels. Helps to provide uniformity and is recommended that you have this ticked.

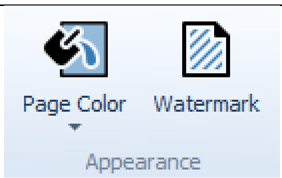
Page



Margins: You can define the size of the page margins here. You can select from some predefined values or set your own custom values.

Orientation: Change the orientation of the page to either Landscape or Portrait.

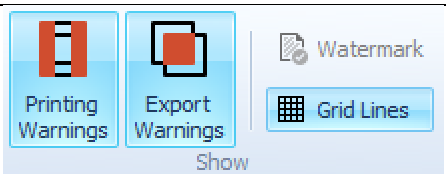
Size: Define the page size of the report. You can select from predefined values such as A4 or A5 or custom define one.



Page Colour: Change the background colour of the page.

Watermark: Add an image or text to the background of the page.

View

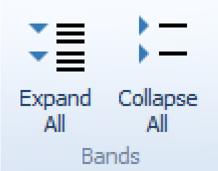
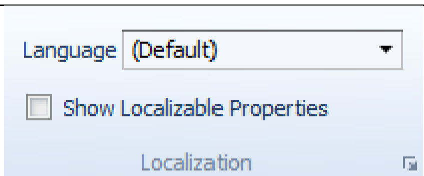
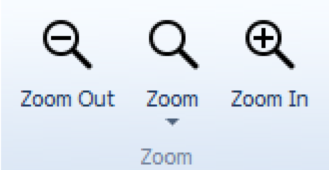


Printing Warnings: When enabled this warns the user if any controls on the page cross over the right-hand margin. If they do, it generates an additional page to fit the control in.

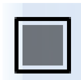
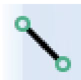
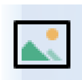
Export Warnings: This highlights in red any controls that are intersecting or overlapping.

Watermark: If the report has a watermark present this can hide it on the design if you temporarily need to.

Grid Lines: Toggles on or off the background page grid.

	**Expand All**: Expands all bands on the report. For example, it will expand the GroupHeader or Detail band. **Collapse All**: Collapses all groups on the report.
	**Language**: Specifies the language associated with the localizable property values within the report. For example, certain font types will only support certain languages. **Show Localizable Properties**: When ticked only properties effected or changed by language localization will appear on the Properties panel.
	**Zoom Out**: Zooms out so that you can see more detail on the screen **Zoom**: Allows you to select a certain zoom level **Zoom In**: Zooms in on the screen by one level
	• Windows – This menu allows you to toggle on or off the seven toolbo windows at the edges of the screen. These are: Report Explorer, Fiel List; Properties, Report Gallery; Group and Sort, Scripts Errors an Toolbox.

Now we will look at some of the standard control tools and how to insert them into a report. We will focus on the main ones that we recommend using within these layout reports.

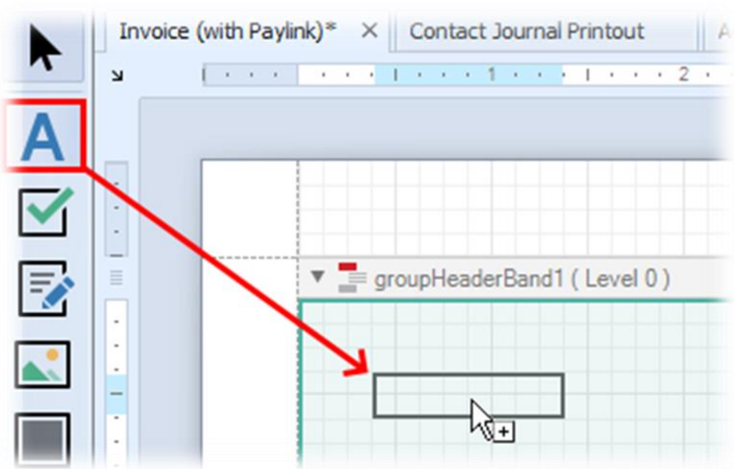
	**Label**: This will be the more commonly used control. You would use this for titles, headers, and merge fields.		**Panel**: Serves as an umbrella to house multiple controls such as labels and keeps them formatted within an area.
	**Check Box**: Used to display Boolean fields, which is to say True or False values from the database.		**Table**: Allows multiple merge fields to be inserted into a table like structure. Useful to use it within the Details area of the report.
	**Rich Text**: Works like a label field but allows for individual parts of the text to be formatted differently. This is good to use for extensive information.		**Line**: This is just a line shape that can be inserted into a report for aesthetic reasons.
	**Picture Box**: Allows the importing of an image onto the layout report.		

Adding New Components to a Layout Report

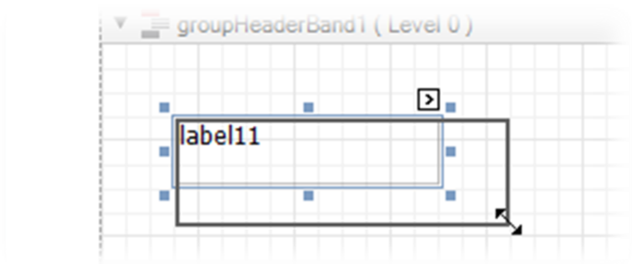
1. Go to the Reports and Template area of the software, right click on a layout report, and select **Design Template.**

2. From there left-click on a control like the Label and drag and drop this onto the report.

Adding a New Control



Resizing a Control



3. To resize it, left click on the edge of the label and drag to expand it.

4. You change the text within the label field by double clicking onto it and this will allow you to change the text present.

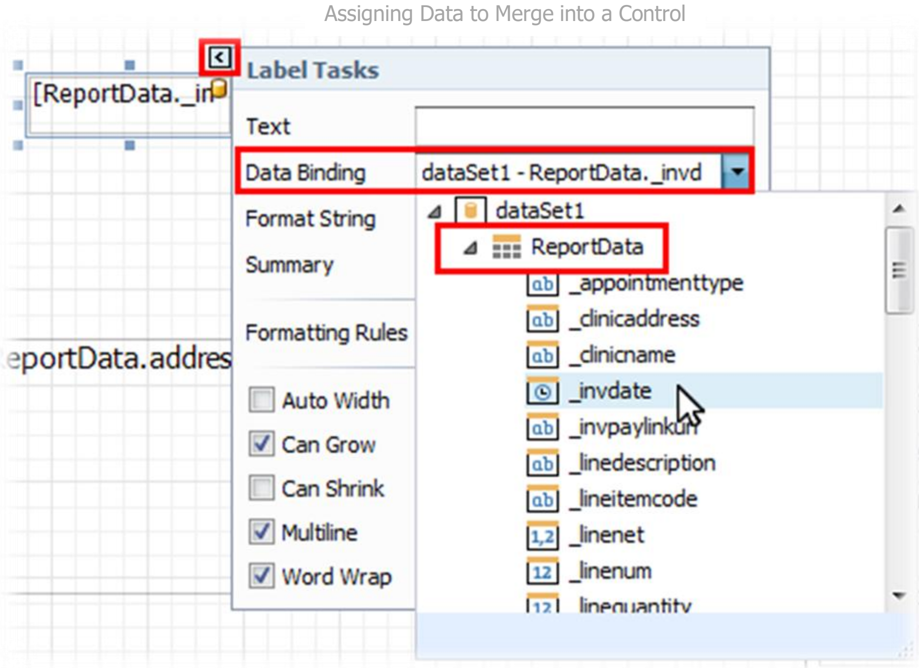
5. If this field should pull or merge information from the database, then you can do this by selecting the label and clicking on the small arrow that sits towards the top right of this label.

6. Click on the drop-down menu of the **Data Binding** field

7. Expand the ReportData header and select the data you wish to appear within this field

8. If you have selected data that is date/time or currency based or maybe you wish to format a number, then you can format this from the same Label Tasks area by clicking on the three dots on the **Format String** field.

Assigning Data to Merge into a Control



9. Within the Format String Editor screen, you can select your category on the left-hand side, such as DateTime or Currency. When you select the category, you will be presented with a list of predefined options that you can select from. If you go to the **Custom** tab, you can specify your own format. For example, if you have selected DateTime and go to **Custom** you could enter just "**d**" (without quote marks). This will format your date to use the local regional date format from your machine. Click **OK** once you are finished.

From the Label Tasks (as shown above) you can also set things such as "**Auto Width**", "**Can Grow**"; "**Can Shrink**", "**Multiline**" and "**Word Wrap**". These additional options just aid for the formatting. For example, if you are merging in something like the clinic address which is multiline by nature then you would want to make sure to have that option ticked.

The above instructions are in no way exhaustive and it merely scratches the service of what the Layout Reports are capable of. At the very least though it should hopefully give you an idea of how to add fields and how to find the options associated with this control.

Q. What is the easiest way to add an image to such a report?

A. The easiest way is to just copy and paste in the image. When you do this, it will automatically put the image into a Picture Box control. One thing you will probably want to do though is either resize the field afterwards or change how the image scales. You can change the scaling by clicking on the Picture Box and then clicking on the small arrow towards the top right of it. From this Label Task area click on the Sizing field drop-down and generally we recommend you select "**Squeeze**". This will always maintain the aspect ratio of the image.

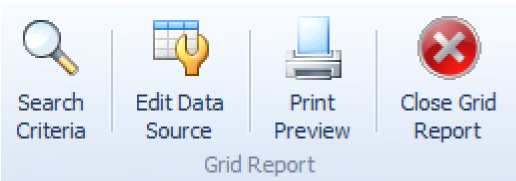
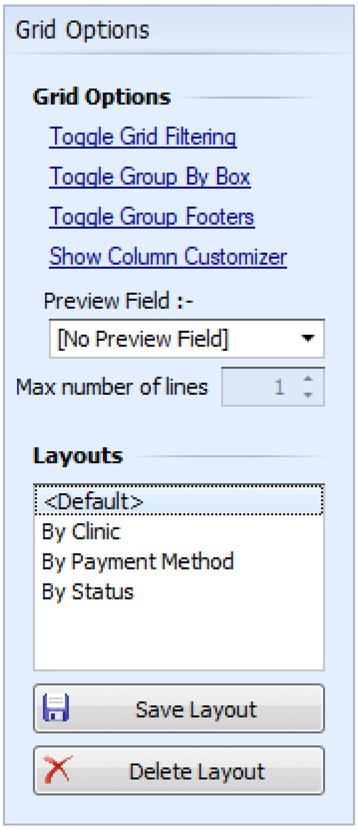
Grid Reports

The grid reports are much the same as the other grids that you see within ClinicOffice, but with slightly more search functionality and grid layouts already setup. Unlike the layout reports and document templates which are designed to generate information to present to your client or patient, the grid reports are very much for the purpose of internal reporting.

By default, ClinicOffice has an array of different types of grid reports which will inform you on things such as invoice totals, appointments performed, staff login history and much more. You can run anyone of these reports by going to the Reports and Templates area of the program and double clicking on one of these reports, the Payment List for example. When you run a report, you will be presented with a Search Criteria window, that will allow you to specify things such as date period. It might be worth viewing the “Other Search Fields” as this could have additional criteria that will be helpful for your reporting.

Once the report is open, you can move the data around, order the fields differently or even place filters on the grid. Editing a grid report is very much the same as editing a grid layout. You will notice that there are several Grid Layouts available in the Grid Options box on the right of the page. You can add to these by clicking **SAVE** once you have a design that you are happy with and inputting a name. Once you press **OK** your saved layout will appear there too.

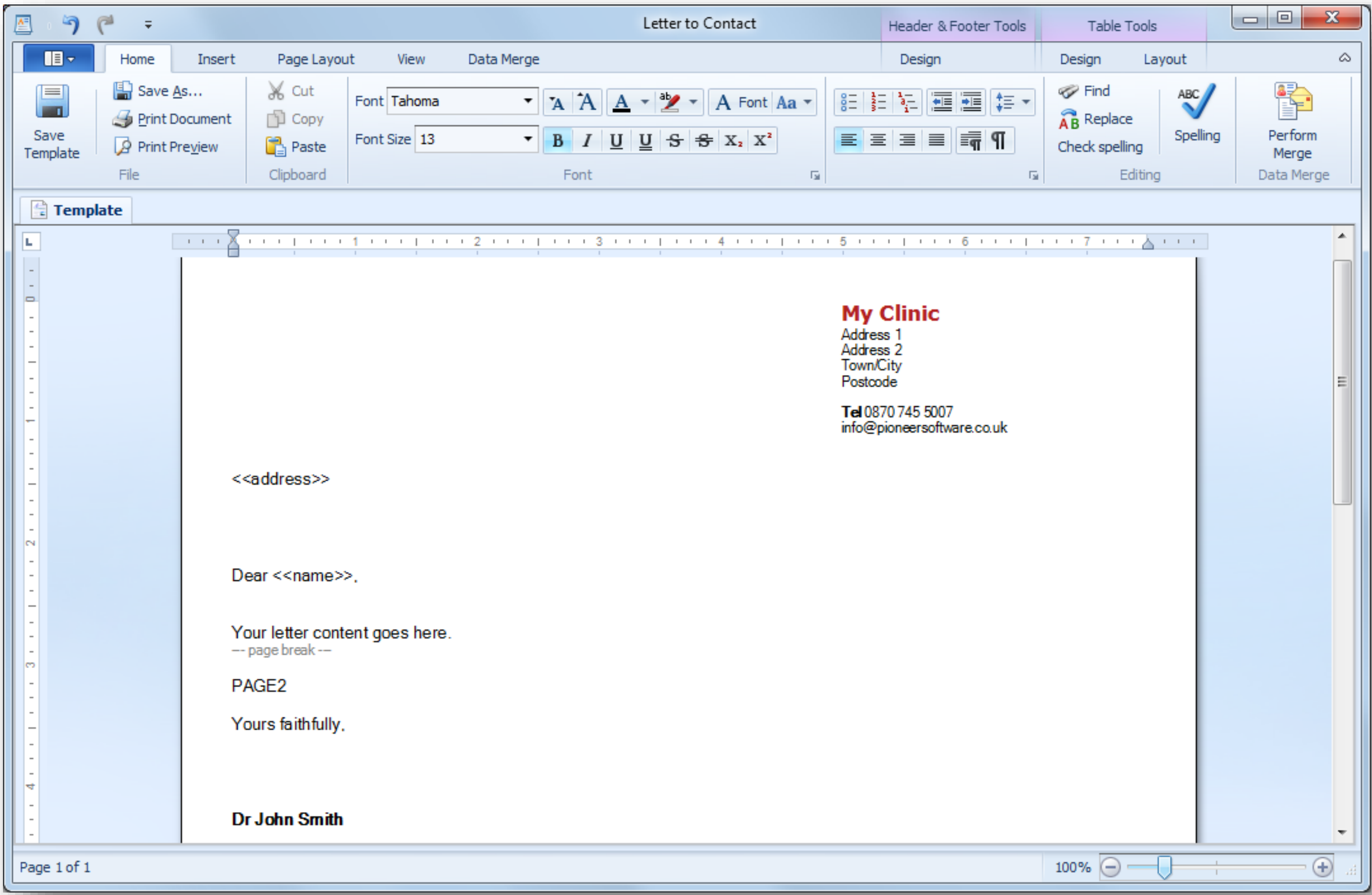
For more information on how to do any of the above please see the “Working with ClinicOffice Grids” section of the User Guide. Each grid report will also support charts that can be used to visualise your data. For more information on how to run and create charts please see the sections “Charting” and “Chart Designer” of the User Guide.

	**Search Criteria**: This brings up the criteria box, so you can change the data that is on the screen **Edit Data Source**: This is where you can change the SQL source that draws the data from the database (recommended for advanced users only) **Print Preview**: Will show you a preview of how the grid will be printed off. **Close**: Grid Report Closes the report prompting you to save if necessary
	**Charts**: Enables you to generate chart such as a pie chart or bar graph based on your grid data. It will update automatically depending on your search criteria and what is being displayed at that moment on time on the grid. Please see the sections “Charting” and “Chart Designer”
	**Toggle Grid Filtering**: Display an additional row below each of the column headers that allows you to filter on a column with a value. **Toggle Group By Box**: This will show the group by box at the top of the grid and you can drag on of the column headers into this to group the grid by that header. **Toggle Group Footers**: This will show footers for your groups if the grid is grouped by a header. **Toggle Column Customizer**: Displays the Customization window that may can contain any hidden column headers. **Preview Field**: Can be used for fields with more extensive information such as note type fields. When enabled this will appear as a preview window row below each existing row. **Max number of lines**: Effects the maximum number of lines displayed in the Preview field when that option is enabled. **Layouts**: Any adjustments to the grids grouping, filtering, or positioning of column headers can be saved a as a layout for future use. For a more detailed explanation of what each part of the Grid Options does, please see the section “Grid Options” in this User Guide.

Document Templates

This is the ClinicOffice Word Processor. It can be viewed as a light version of Microsoft Word or LibreOffice. You would use a Document Template to write letters to a patient or to the patient's GP for example.

ClinicOffice Word Processor



How to Create a New Document Template

If you need wish to create a new letter, then we recommend that you copy an existing one based on what information you need. For more information on how to do this, please see "Creating a Report or Document Template".

How to Edit a Document Template

1. Go to the **Reports and Templates** section of ClinicOffice
2. Scroll down to the Letters section and right-click on an existing letter
3. Select **Edit Template**

From here you can modify the document like you would in a standard word processor. You can also copy and paste in text and images from other words documents. The next set of steps below will look at how to add the current date and time to the report.

1. Within the template click on the area within the document that you wish for the date to appear
2. Go to the **Insert** tab
3. Click the **Date/Time** button
4. Select the format that you want the date or time to appear in and click **OK**

The date and time will update whenever you go to run the letter or open the template. From the **Insert** menu you can also select to insert things like tables, images, hyperlinks, and text boxes.

If you want to insert merge fields that will pull through information such as the patient's name, their address or other information, please follow the steps below.

1. Within the template screen, click on the area you wish to insert the merge field
2. Go to the **Data Merge** tab
3. Click on the lower half of the **Insert Merge Field** button and select the field you wish to merge

Remember to click **Save Template** from the Home tab once you have finished inserting the desired merge fields and modifying the letter.

Formatting Merge Fields

If you insert a date-based merge field it will default to a United States of America format. If you need to change this or wish to display the time as well as the date, please follow the steps below.

1. Within the template editor screen, go to the **Data Merge** tab
2. Click the **Show Field Codes** button
3. If the date-based field is **<<dob>>** for example, then it will now display as **{ MERGEFIELD dob }**. After the merge field name "dob" insert: **\@ "dd/MM/yyyy"**. Once you are finished it should look like **{ MERGEFIELD dob \@ "dd/MM/yyyy"}**.
4. Click the **Show Field Names**, go back to the **Home** tab, and click **Save Template**

In step three you will note we use a **\@** and this tells the system that this is a date. After this we place a space and enter within double quotes the format. The above example uses the UK and Ireland date format but you can change it to however you need it to appear for example "**dd-MM-yy**" or "**yyyy.MM.dd**" or "**dd/MM/yyyy HH:mm**". Below is date/time reference grid.

Format Code	Represents	Display Example	Format Code	Represents	Display Example
dd	Day of Month	01	HH	24 Hours Format	14
dddd	Day of Month	Monday	hh	12 Hours Format	02
MM	Month of Year	05	mm	Minutes	52
MMMM	Month of Year	May	ss	Seconds	33
yy	Year	21			
yyyy	Year	2021			

Document Template Components

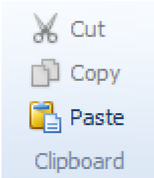
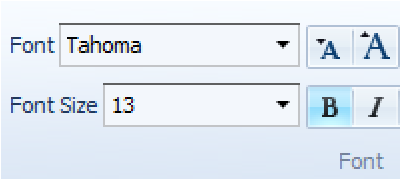
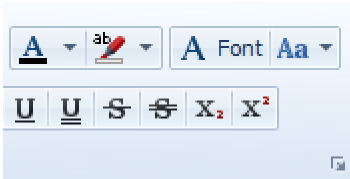
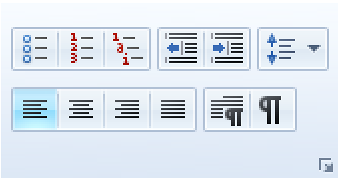
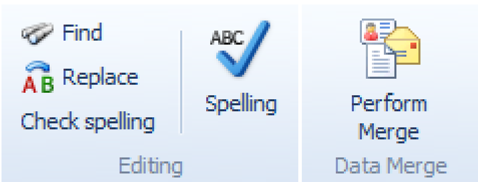
Below is a more detailed look at the ribbon bar and see what options we have available.

<table>
<tr><th colspan="2">Home Tab</th></tr>
<tr><td>
</td><td>Save Template: This saves any changes made to the template.

Save As...: Allows you to save the template as an RTF file outside of ClinicOffice.

Print Document: This will allow you to print the document.

Print Preview: Shows a print preview of the document.</td></tr>
</table>

	**Cut**: Cuts the selected text and stores it to the clipboard. **Copy**: Copies the selected text and stores it to the clipboard. **Paste**: Allows you to paste the contents of the clipboard.
	**Font**: Allows you to change the font type of the text. **Shrink Font**: This shrinks the font size by 1 font size. **Grow Font**: This increases the font size by 1 font size. **Font Size**: Allows you to change the size of the text. **Bold**: Makes the selected text bold. **Italic**: Makes the selected text italic. **Font Colour**: Changes the colour of the selected text. **Text Highlight Colour**: This highlights the background of the text in a colour. **Font 2**: Allows you to adjust all font settings. **Change Case**: Changes the case of the text. **Underline**: Underlines the selected text. **Double Underline**: This underlines the text twice. **Strike Through**: This put a line straight through the selected text. **Double Strike Through**: Puts two lines through the selected text. **Subscript**: This makes the text small and places it at the text baseline. **Subscript 2**: This makes the text small and places it above the line of text.
	**Bullets**: Puts the text into bullet points. **Numbering**: Puts the text into numbered bullet points. **Multilevel List**: Allows you to create a staggered numbered bullet point system. Works with the numbering button. **Decrease Indent**: Decreases the indent level of a paragraph. **Increase Indent**: Increases the indent level of a paragraph. **Line Spacing**: Change the width of space between the text's lines. **Align Text Left**: This aligns the text to the left of the page. **Align Text Centre**: This aligns the text to the centre of the page. **Align Text Right**: This aligns the text to the right of the page. **Justify**: Adjust the text so that there is equal spacing between the left and right.
	**Find**: Enables you to locate a specific word in the body of text. **Replace**: Allows you to replace a specific word. **Check Spelling**: Automatically spell checks the document. **Spelling**: This will perform a one-off spell check on the entire document. **Perform Merge**: This merges the document template with your specified data in ClinicOffice.

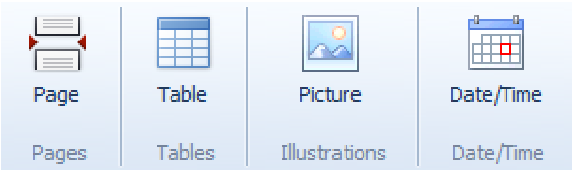
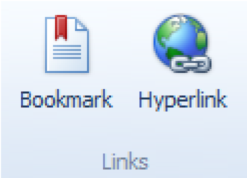
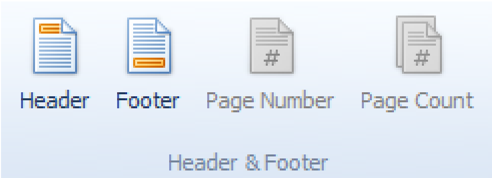
<table>
<tr><th colspan="2">Insert Tab</th></tr>
<tr><td>
</td><td>Page Break: Any text or images on this line will be placed on a new page.

Table: This creates a table in the document.

Picture: This allows you to insert an image into ClinicOffice.

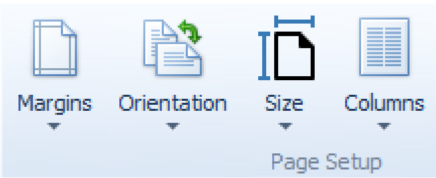
Date/Time: Inserts today’s date and or time into the document. In addition, provides an option to update that date/time whenever the document is opened.</td></tr>
<tr><td>
</td><td>Bookmark: Allows you to insert bookmarks into the document.

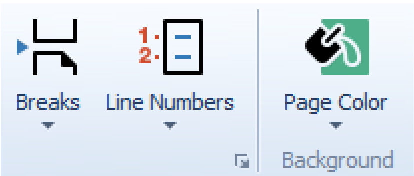
Hyperlink: Allows you to insert an active link to a web page or document.</td></tr>
<tr><td>
</td><td>Header: This allows you to edit the header.

Footer: This allows you to edit the footer.

Page Number: This inserts the number of pages the document makes up.

Page Count: This inserts the number page number.</td></tr>
<tr><td>
</td><td>Symbols: Allows you to insert different symbols into ClinicOffice.

Signature Point: Inserts a signature point for the letter to be signed via the E-Documents system.</td></tr>
<tr><th colspan="2">Page Layout Tab</th></tr>
<tr><td>


</td><td>Margins: From here you can alter the width of the margins on the document.

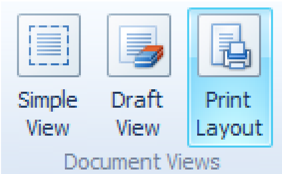
Orientation: This allows you to select either portrait or landscape.

Paper Size: Allows you to select the page size of the document.

Columns: Allows you to select to have either one, two or three columns on a single page.

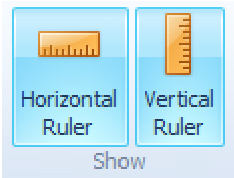
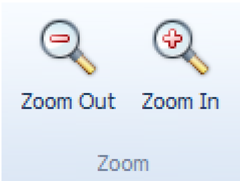
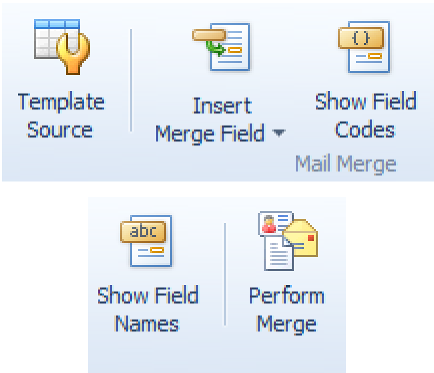
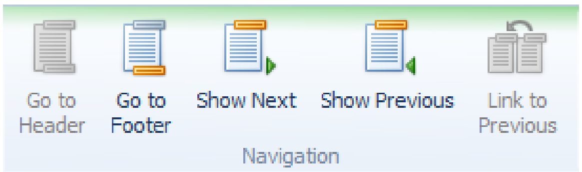
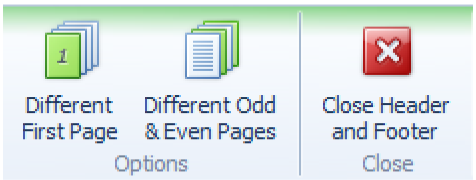
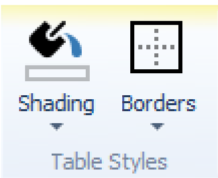
Breaks: Insert a page break either on the current page, next page or on an odd or even page.

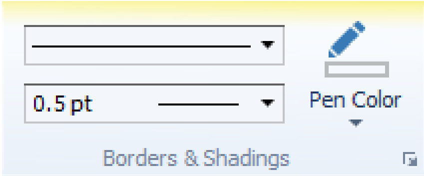
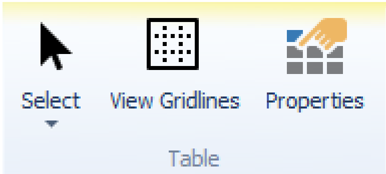
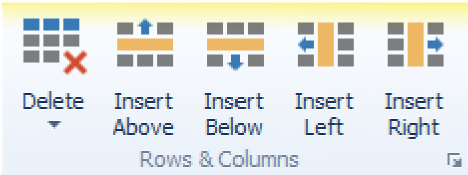
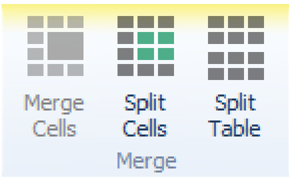
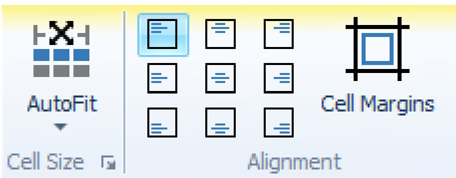
Line Numbers: Inserts a line number, presenting a line count, down the left-hand side margin.

Page Colour: Sets the background colour of the page</td></tr>
<tr><th colspan="2">View Tab</th></tr>
<tr><td>
</td><td>Simple View: This will display the document as a simple memo. It ignores the page layout.

Draft View: In this view elements such as the header and footer will not be visible.

Print Layout: This will view the document as it would appear when printed.</td></tr>
</table>

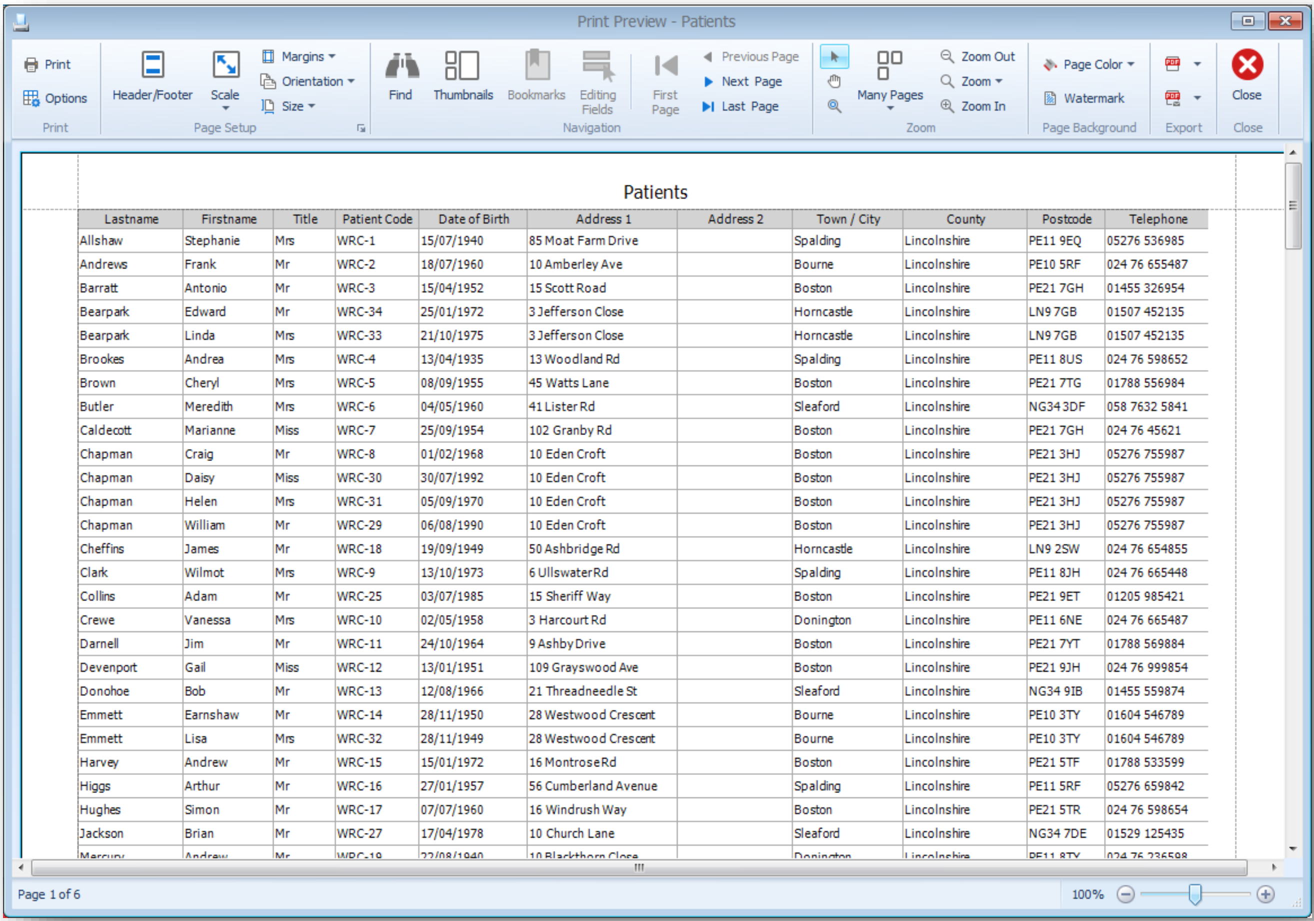
	**Horizontal/Vertical Ruler**: When the **Horizontal Ruler** is selected a ruler will appear at the top of the page and when **Vertical Ruler** is selected a ruler will appear to the left of the document. You will note that when you select Print Layout both options will be selected by default. When you select Draft View only the Horizontal Ruler will be. When you select Simple View neither of them will be.
	**Zoom Out**: This will decrease the zoom factor on the document by 10%. This will have the effect of making very thing look smaller, but it will not affect the physical size of the document. **Zoom In**: This will increase the zoom factor on the document by 10%. This will have the effect of making everything look larger but again it will not affect the physical size of the document.
Data Merge Tab	
	**Template Source**: This is the documents source code. This requires knowledge of the SQL language. **Insert Merge Field**: This allows you to insert merge fields such as names and addresses into the document template. **Show Field Codes**: This shows you the formatting of a merge field, such as the structure of a date. **Show Field Names**: This takes you back to the normal view and shows you the name of the merge fields. **Perform Merge**: This merges the document template with your specified data in ClinicOffice.
Header & Footer Tools - Design Tab	This Design Tab is only useable when you have clicked on either the Header or Footer from the Insert Tab
	**Go to Header**: This takes you to the header of the current page. **Go to Footer**: This takes you to the footer of the current page. **Show Next**: This takes to the next header or footer. **Show Previous**: This takes to the previous page's header or footer. **Link to Previous**: This links the current header and footer you have selected with the previous page's header and footer.
	**Different First Page**: This allows you to specify a unique header and footer for the first page. **Different Odd & Even Pages**: This allows you to specify unique headers and footers for the Even and Odd pages. **Close Header and Footer**: This takes you back to the main body of text and closes the header and footer.
Table Tools - Design Tab	This Design Tab is only useable when you have created and have selected a table on the document.
	**Shading**: Allows you to select the background colour of a cell. **Borders**: Allows you to change the borders of a selected cell.

	**Line Style**: Allows you to change the style of the borders of the cell. **Line Weight**: Allows you to change the thickness of the borders on the cell. **Pen Colour**: This changes the cell border's colour.
Table Tools - Layout Tab	The Layout Tab is only useable when you have created and have selected a table on the document.
	**Select**: Gives you the options to select a cell, select a whole column/row or to select the entire table. **View Gridlines**: By selecting this option, it will display any grids that have their cell borders hidden on the document. **Properties**: This takes you to the table properties and allows you to view and edit the settings for a cell or table.
	**Delete**: Give you the option to either delete cells, delete columns, delete rows or to delete whole tables. **Insert Rows Above**: This inserts a row above the current selected cells. **Insert Rows Below**: This inserts a row below the current selected cells. **Insert Columns to the Left**: This inserts a column left of the current selected cells. **Insert Columns to the Right**: This inserts a column right of the current selected cells.
	**Merge Cells**: You can merge selected cells using this. **Split Cells**: You can split selected cells. **Split Tables**: This will split the whole table into two.
	**AutoFit**: Allows you to autofit the table to the cell contents, to the Window or you can lock the column widths. **Align Top Left**: Positions the text top left of the cell. **Align Top Center**: Positions the text top centre of the cell. **Align Top Right**: Positions the text top right of the cell. **Align Center Left**: Positions the text centre left of the cell. **Align Center**: Positions the text centre of the cell. **Align Center Right**: Positions the text centre right of the cell. **Align Bottom Left**: Positions the text bottom left of the cell. **Align Bottom Center**: Positions the text bottom centre of the cell. **Align Bottom Right**: Positions the text bottom right of the cell. **Cell Margins**: Specify the margin sizes of a cell. You can also set the spacing between cells and select to automatically resize cells based on the contents.

Printing

Any page that is displaying information regarding a patient, contact or staff member can be printed out. Most software would provide you with a print preview of what you are about to print out and ClinicOffice is no exception.

Patient Grid Print Preview

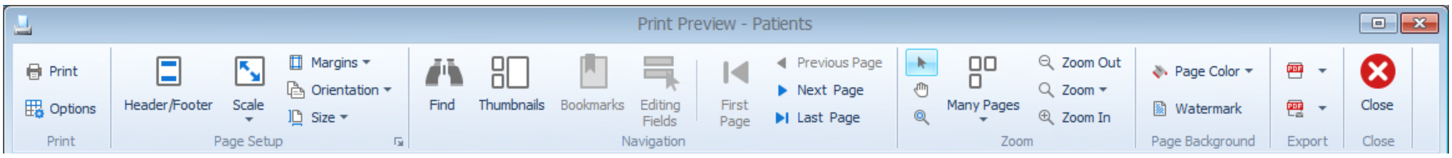


Patients

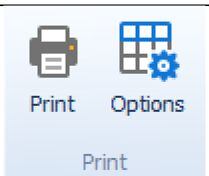
Lastname	Firstname	Title	Patient Code	Date of Birth	Address 1	Address 2	Town / City	County	Postcode	Telephone
Allshaw	Stephanie	Mrs	WRC-1	15/07/1940	85 Moat Farm Drive		Spalding	Lincolnshire	PE11 9EQ	05276 536985
Andrews	Frank	Mr	WRC-2	18/07/1960	10 Amberley Ave		Bourne	Lincolnshire	PE10 5RF	024 76 655487
Barratt	Antonio	Mr	WRC-3	15/04/1952	15 Scott Road		Boston	Lincolnshire	PE21 7GH	01455 326954
Bearpark	Edward	Mr	WRC-34	25/01/1972	3 Jefferson Close		Horncastle	Lincolnshire	LN9 7GB	01507 452135
Bearpark	Linda	Mrs	WRC-33	21/10/1975	3 Jefferson Close		Horncastle	Lincolnshire	LN9 7GB	01507 452135
Brookes	Andrea	Mrs	WRC-4	13/04/1935	13 Woodland Rd		Spalding	Lincolnshire	PE11 8US	024 76 598652
Brown	Cheryl	Mrs	WRC-5	08/09/1955	45 Watts Lane		Boston	Lincolnshire	PE21 7TG	01788 556984
Butler	Meredith	Mrs	WRC-6	04/05/1960	41 Lister Rd		Sleaford	Lincolnshire	NG34 3DF	058 7632 5841
Caldecott	Marianne	Miss	WRC-7	25/09/1954	102 Granby Rd		Boston	Lincolnshire	PE21 7GH	024 76 45621
Chapman	Craig	Mr	WRC-8	01/02/1968	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987
Chapman	Daisy	Miss	WRC-30	30/07/1992	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987
Chapman	Helen	Mrs	WRC-31	05/09/1970	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987
Chapman	William	Mr	WRC-29	06/08/1990	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987
Cheffins	James	Mr	WRC-18	19/09/1949	50 Ashbridge Rd		Horncastle	Lincolnshire	LN9 2SW	024 76 654855
Clark	Wilmot	Mrs	WRC-9	13/10/1973	6 Ullswater Rd		Spalding	Lincolnshire	PE11 8JH	024 76 665448
Collins	Adam	Mr	WRC-25	03/07/1985	15 Sheriff Way		Boston	Lincolnshire	PE21 9ET	01205 985421
Crewe	Vanessa	Mrs	WRC-10	02/05/1958	3 Harcourt Rd		Donington	Lincolnshire	PE11 6NE	024 76 665487
Darnell	Jim	Mr	WRC-11	24/10/1964	9 Ashby Drive		Boston	Lincolnshire	PE21 7YT	01788 569884
Devenport	Gail	Miss	WRC-12	13/01/1951	109 Grayswood Ave		Boston	Lincolnshire	PE21 9JH	024 76 999854
Donohoe	Bob	Mr	WRC-13	12/08/1966	21 Threadneedle St		Sleaford	Lincolnshire	NG34 9IB	01455 559874
Emmett	Earnshaw	Mr	WRC-14	28/11/1950	28 Westwood Crescent		Bourne	Lincolnshire	PE10 3TY	01604 546789
Emmett	Lisa	Mrs	WRC-32	28/11/1949	28 Westwood Crescent		Bourne	Lincolnshire	PE10 3TY	01604 546789
Harvey	Andrew	Mr	WRC-15	15/01/1972	16 Montrose Rd		Boston	Lincolnshire	PE21 5TF	01788 533599
Higgs	Arthur	Mr	WRC-16	27/01/1957	56 Cumberland Avenue		Spalding	Lincolnshire	PE11 5RF	05276 659842
Hughes	Simon	Mr	WRC-17	07/07/1960	16 Windrush Way		Boston	Lincolnshire	PE21 5TR	024 76 598654
Jackson	Brian	Mr	WRC-27	17/04/1978	10 Church Lane		Sleaford	Lincolnshire	NG34 7DE	01529 125435

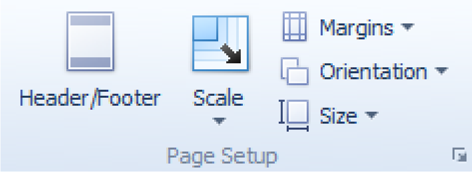
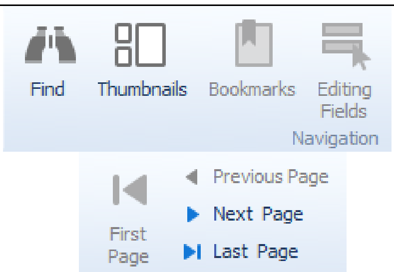
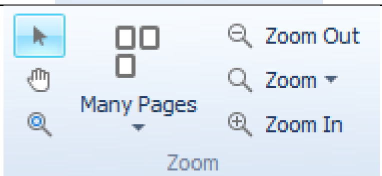
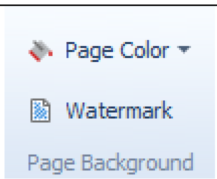
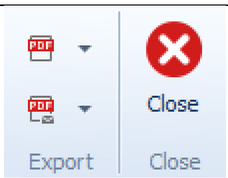
Using the print preview in COv5 is a great way to see exactly what your print out will look like. You can also from here export the printout to a PDF or even an Excel file.

Print Preview Ribbon Bar



The print preview ribbon bar is broken up into the following sections:-

	• Print Brings up the standard windows print dialogue. • Options This is sometimes called, 'Page Setup'. This brings up a range of options to alter the appearance of the print preview. For example, paper size, colour settings and many more.

	• Header/Footer Allows you to put a custom header and footer in. It also has options to generate name, date and time. If you are printing off a Grid Report, then you can enter **[Criteria]**; this displays your Search Criteria. • Scale Enables you to shrink or expand the size of the printout and allows you to select how many pages you wish to save the document onto. • Margins Gives you 4 different margin sizes to choose from. • Orientation Allows you to choose between Portrait and Landscape. • Size Selects the size of paper you wish to print upon.
	• Find Allows you to search for a name or word. • Bookmarks This allows you to navigate through the document in a structural view. • First/Previous/Next/Last Page Enables you to browse through multiple pages quickly.
	• Many Pages With this you can select the number of pages you wish to display upon on screen. • Zoom Out/In You can zoom in and out in a progressive manner. • Zoom Allows you to zoom in or out by a set percentage.
	• Page Colour Allows you to set a background colour for the page. • Watermark Allows you to insert a background image and text.
	• Export To Allows you to export the print preview into the following formats: PDF, HTML, MHT, RTF, Excel, CSV, Text, Image. • E-Mail As This is like **Export To**, but after you have saved the file it will then open your default mailing program with the file attached to it. • Close Print Preview This closes the Print Preview window down.

At times you will have to adjust the settings so that you have the document presented in the way you need it. This is particularly the case with printing off Grids and the Appointment Diary. Remember that the more information you have the less likely it will fit onto one page. For example, you will struggle to fit several practitioners, each with a full diary onto one page displaying all appointments.

Online Forms and E-Docs

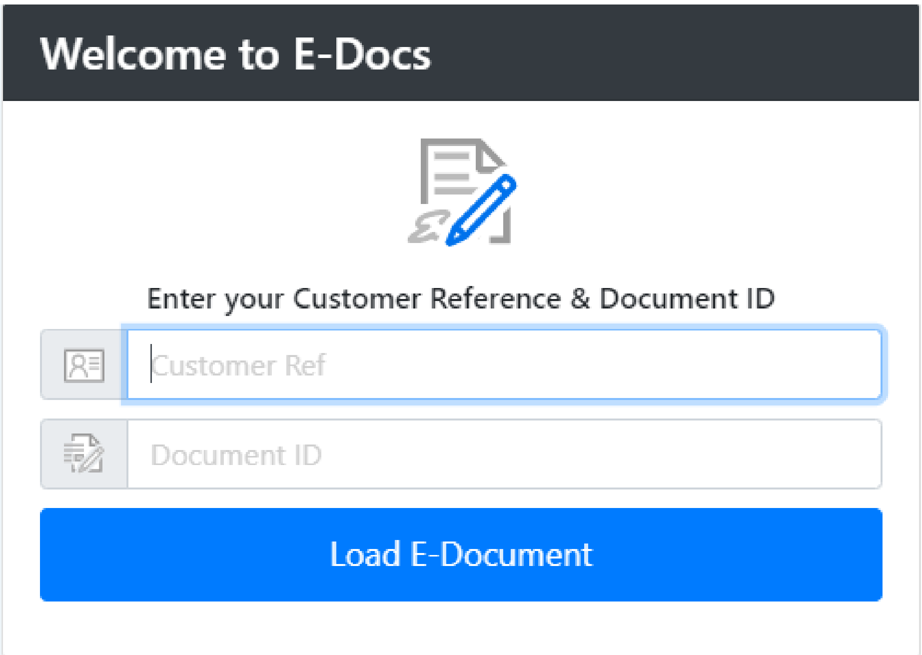
One of the biggest time consumers for Clinics can be the long wait while patients fill in and sign a medical history form or something similar. ClinicOffice assists with this by allowing you to create your own forms, and then email them out to patients. Once completed, ClinicOffice can store the forms or save them as PDF documents within the patient record that they relate to.

This feature also allows for the collection of electronic signatures, and therefore replaces the current E-Sign feature.

To use our **ClinicOffice E-Docs** service, you need the following :-

- ClinicOffice v5 (Startup, Professional, Server or Hosted editions)
- The **Documents Module** add-on
- The **Forms Module** add-on (Only if you want to create fillable custom forms as well as collect signatures)
- *Either* a **Hosted** account, or the ClinicOffice **Support Plan**
- A touchscreen device such as a tablet, preferably with at least a 10" screen (Only needed if you plan to use this within the Clinic.)

Please click the link below to find out more about the benefits of **E-Docs** and the required specifications of your tablet device: https://pioneersoftware.co.uk/co-edocs



Signature Capture

[1] Preparing a Document for Signature Capture

This feature directly replaces the 'E-Sign' feature and so much of it works in exactly the same way. To create your document, please follow the steps below.

1. In ClinicOffice go to the **Reports and Templates** section
    a. *Right-click* on a Letter Template (e.g. "*Letter to Patient*") that you wish to use as a basis for the new E-Sign document and click **Copy**
    b. This creates a copy e.g. "*Letter to Patient (copy 1)*". *Right-click* on that copied template and click **Rename** to give it a new name (e.g. "*Patient Consent*")
    c. Now *right-click* your new Letter Template and click **Edit Template**
2. In the document itself, *left click* to place the cursor on the spot where you wish the signature to be inserted

3. Go to the **INSERT** tab (at the top) and click the **Signature Point** button

You will now see the text **[SIGN HERE]** inserted into your document. You can insert more than one signature point into the document if required.

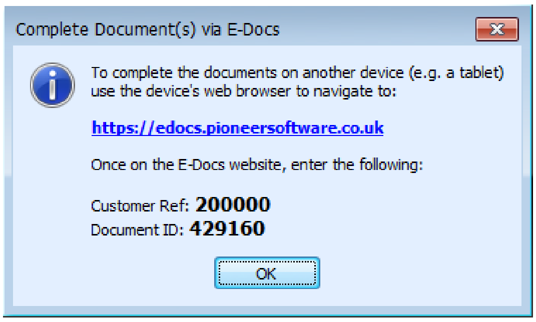
Once you've finished, click the **Save Template** button and close the document editor.

[2] Capturing a Client's Signature

1. To create the E-Docs document, simply merge your Letter Template with a patient record. The recommended way to do this is :-
   a. Open a patient record and click the **Print** button (at the top)
   b. Select the document template (e.g. "*Patient Consent*") created in section [1]
   c. This will open the document and merge in the patient's details

2. You will now see a button to the top left of your screen that says "**Send to E-Docs**" [clicking this opens the E-Docs Manager, which is covered more fully in **Using the E-Docs Manager**]
3. For now, just click "Generate E-Docs" and select "Use a Tablet"
   [Using a tablet (or another device) allows you to open the document with the patient present, and you can hand them a tablet for them to review and sign. Sending an email link allows the patient to fill it out in their own time.]

A message will now appear providing you with your Customer Reference and the Document ID, and a link to the document (see below).



NOTE: Letter Templates can be merged with multiple patient records, however when creating an E-Sign document which is to be signed by ONE person, you obviously only want ONE patient record. Using the PRINT button in the patient record (as described above) ensures that only one patient record is merged into the template.

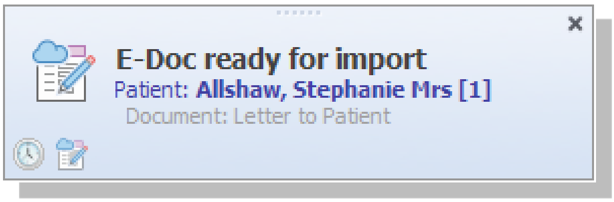
1. On your tablet or other device, enter in the Customer Reference and Document ID into the E-Sign website and click the **Load E-Document** button
2. The document should now appear, and you can hand the device over to the client
3. If they are happy to sign it, then they should :-
    a. Make sure their name appears correctly in the box at the bottom of the screen (if it is incorrect, they can tap on it to correct it)
    b. Use their finger (or stylus of the device has one) to sign their name in the box. If they make a mistake or the signature is inadequate, they can click the **Clear** button to start again
    c. Click the **SIGN** button to insert their signature into the document
    d. (If there are multiple signatures required, step (c) will need to repeat)

4. Finally, they can click the **FINISH** button and hand back the device

> **NOTE:** If the document has multiple signature points, then the patient will need to click the **SIGN** button more than once to reflect each signature. For example, if it is a 2-page document with signature points at the bottom of each page, the patient will to press **SIGN** twice before being able to press the **FINISH** button.

Once the document has been signed, a popup notification message will appear in ClinicOffice (at the bottom right).

You can click the **Open E-Docs Manager** ( ) button on the popup notification to view the signed document.



The final step is to then import the signed document. Clicking on the notification will open the E-Docs Manager, or alternatively, you can find it on the drop-down arrow under the patients button. We will cover how to operate the E-Docs Manager in Using the E-Docs Manager**.**

Q. I accidently clicked OK to the "Document Uploaded to E-Sign" message before making note of the Document ID. Where can I find this number again?

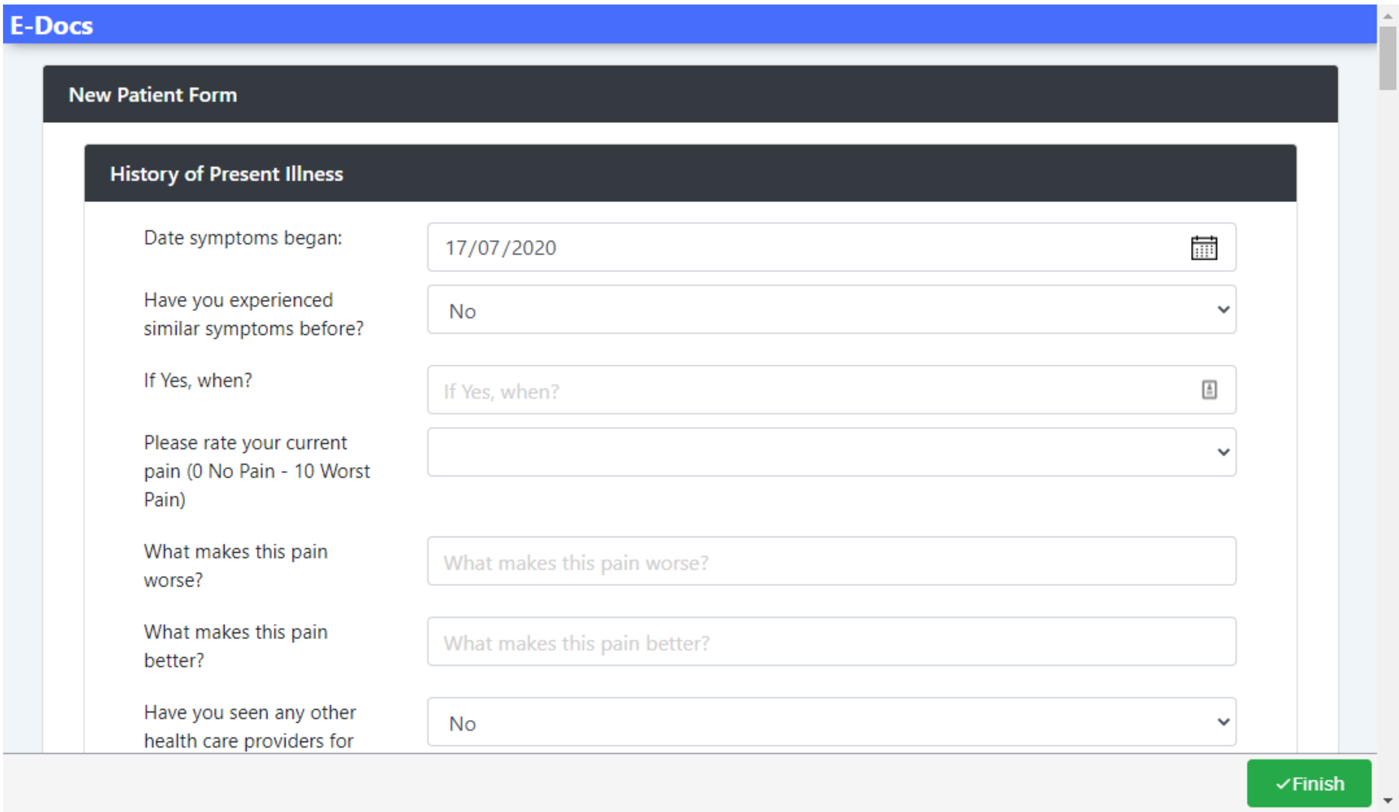
A. You can retrieve the Document ID from the E-Sign Manager, by clicking the lower-half of the **Patients** button on the Home menu in ClinicOffice and selecting E-Sign Manager from there you will see the document and it will state "In Progress" and will provide the **Document ID** in the first column on the left.

Making a Form E-Docs Compatible

This feature allows you to create and send a form to a patient via email for them to complete and return. For example, a Medical History form, or COVID-19 Symptoms form.

1. Firstly, you need to create your form within ClinicOffice. As mentioned at the outset, if you haven't already, you will need the **Forms add-on** module and potentially the **Documents** module to use this feature.

2. To access the Form Manager, head to the '**Tools**' tab in ClinicOffice, and then click '**Forms Manager'**. Double click to edit any form, and from there, click the **Preview Online** button. This will generate the form on the E-Docs service and will open your internet browser with a preview (like the example below).

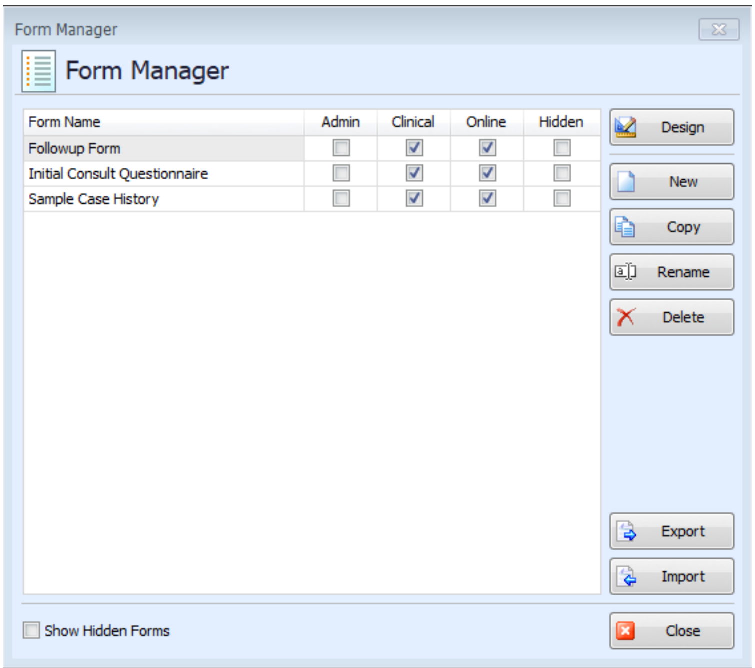


This will at least give you an idea of how it will look online and this will also be what the patient sees.

NOTE: The online form will not be able to mimic some formats. For example, a form might have two or more fields on the same line but when the form appears online, these fields will appear in a linear style. Another thing to note is that checkboxes will appear as Yes/No drop-down menu in the case of a two-state checkbox, and in the case of a three-state it will appear with a blank value or Yes/No.

For more information on how to design a form, please refer to the Designing Forms section. This can be accessed via ClinicOffice's **Help** menu.

3. Once you have your form, you will then need to select whether it is to be "Clinical", "Admin", **OR** both (see below).



An **Admin** form would only allow the form to be saved in the patients documents area. This would be useful for things like "Information Sharing Consent" for example or any forms that only need to be completed once.

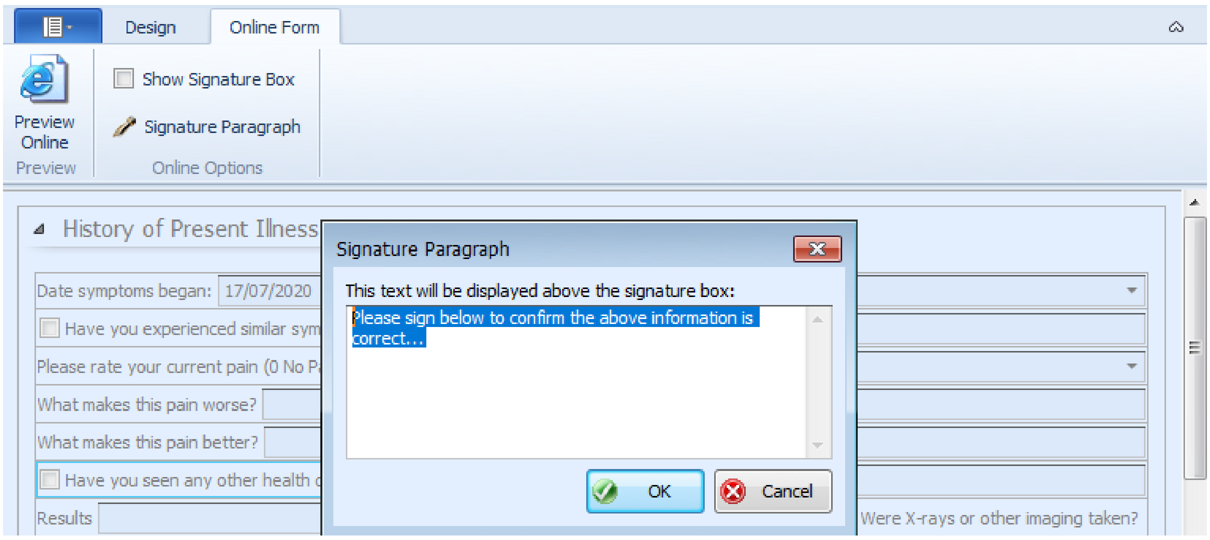
A **Clinical** form would be a form that gets attached to a patients clinical notes and has direct relation to treaments. This would be useful for "Consent to Treatment" type forms.

A form can also be **both.** This might be useful for any type form where you want to have both a copy on the patients documents section and on their Clinical Notes.

Once you are happy with the form, you just need to make sure that the **Online** box is checked, and the form is then ready to be sent out via E-Docs to a patient. To do this, you will need to access the E-Docs Manager.

Q. Can a form be setup to request the patient for a signature?

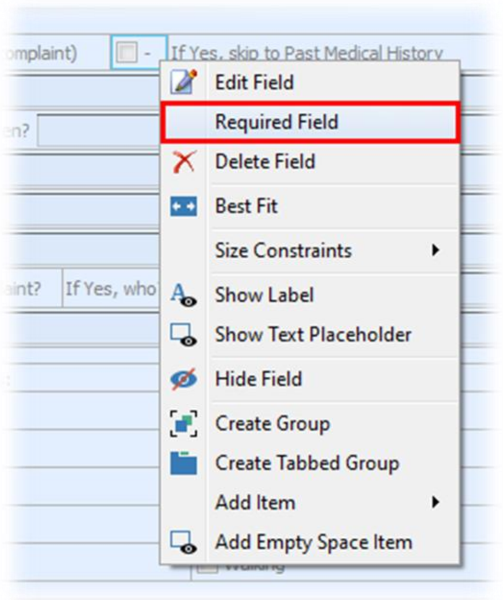
A form can be configured to accept a signature. This can be done by going into the form designer and going to the **Online Form** tab. From there make sure that the "**Show Signature Box**" is ticked. You can customise the text that is presented to the patient before they complete their signature by clicking the **Signature Paragraph** button (see example below).



Q. Can a field be made mandatory?

Yes, you can make a field mandatory. To do this, while in the form designer, you can right-click on a field and select Required Field. Alternatively, when you are adding a new field there will be a "Required field" checkbox that you can select.

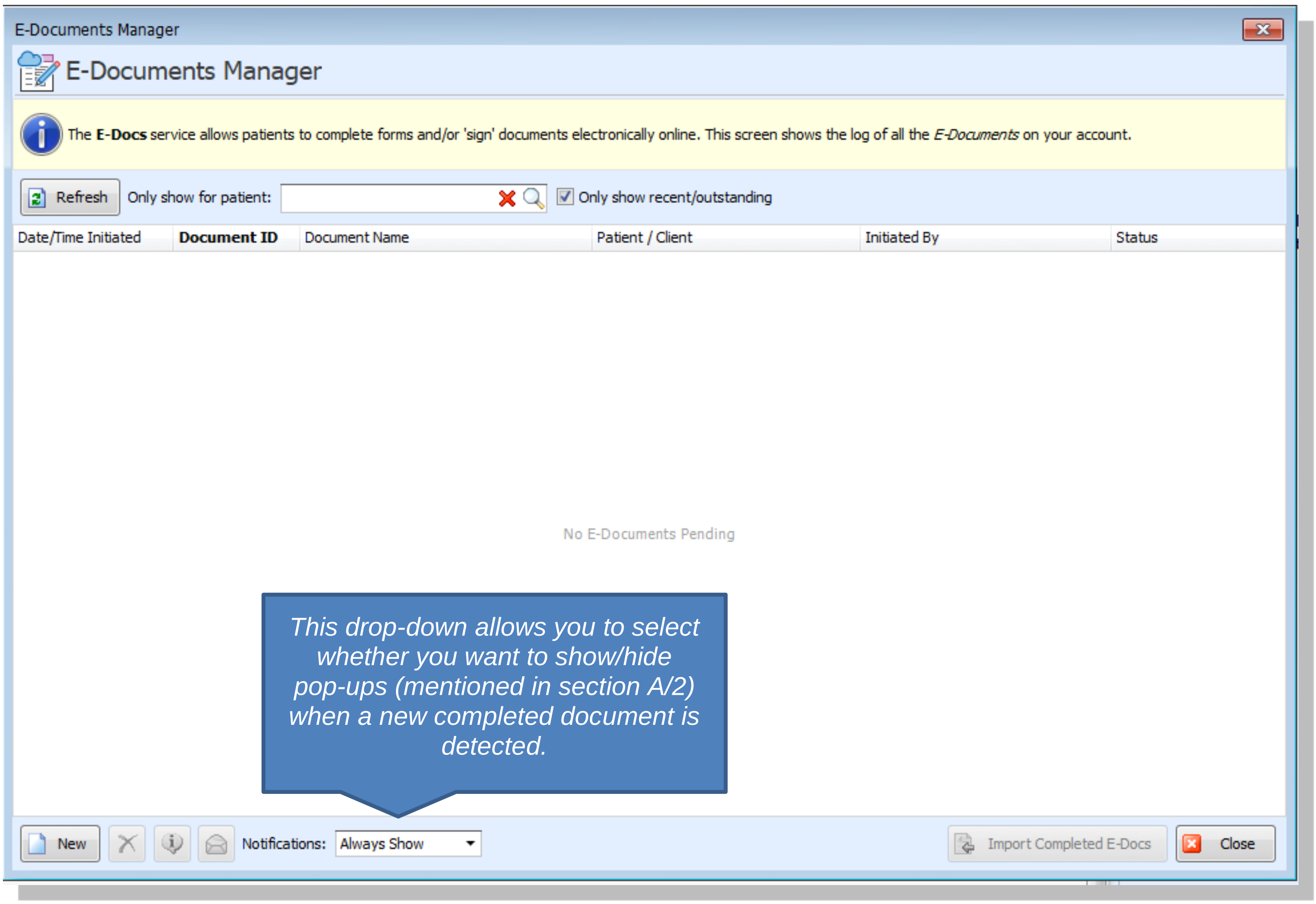
You will know if a field is required because its text will be in red. This is equally true when the form appears online as well. If the patient does not fill the field in they will be prompted to once they click to finalise their form submission.



Using the E-Docs Manager

[1] E-Docs Manager Basics

To access the E-Docs Manager, click on the drop-down arrow under the main Patients button in ClinicOffice, and select 'E-Docs Manager'. You will now see the window below open up.



This screen gives you an overview of all pending documents. The status of the document will be shown here. It will be either waiting to be filled in by the patient or waiting to imported back into ClinicOffice.

Right-clicking on any document from this screen will reveal a list of options, such as re-sending via email, cancelling or showing further document information.

This screen will also show who initiated a document, the name of the patient and the name of the document that has been issued.

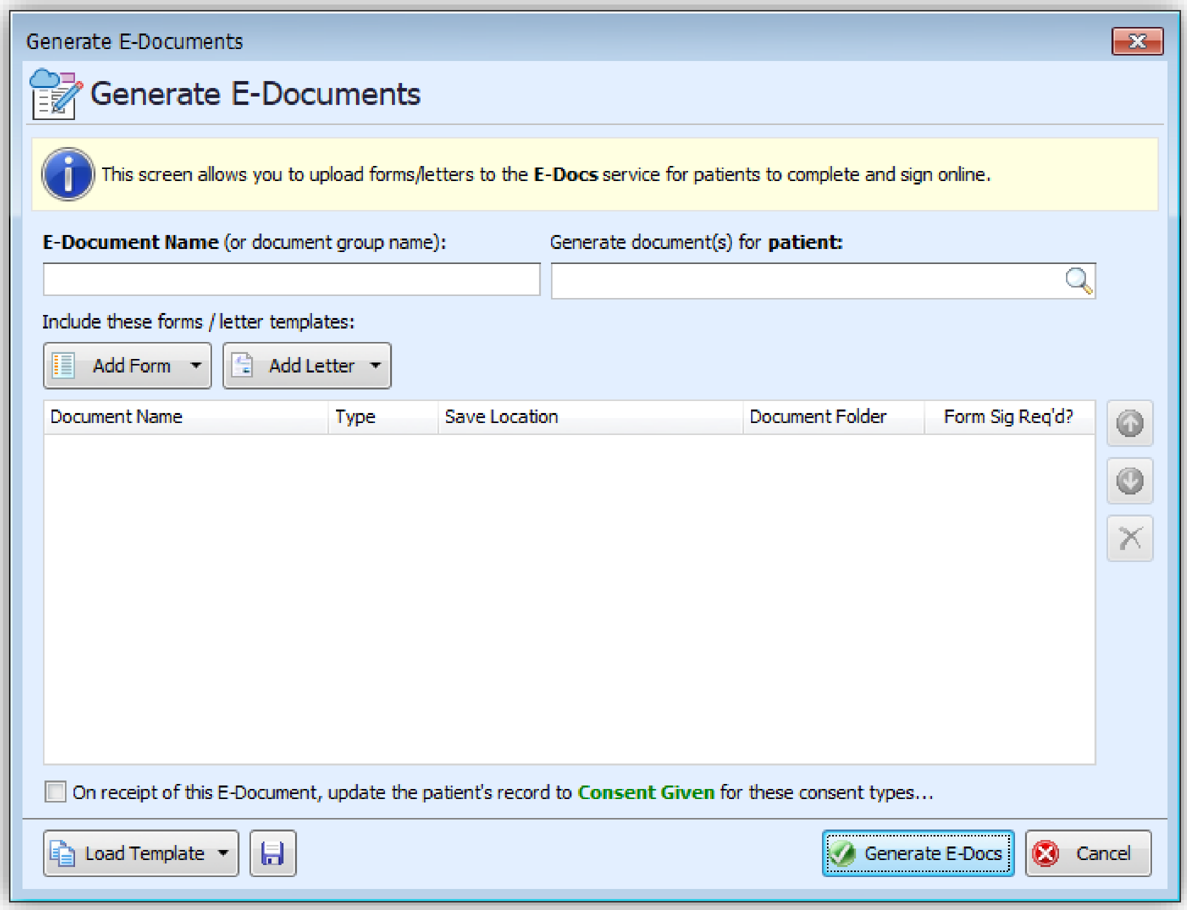
Clicking on '**New**' will take you to the E-Docs generator screen.

[2] Generating E-Documents

There are multiple ways that you can access this screen.

1. One way is as above, through the E-Docs Manager
2. You can also access it via the E-Docs menu from any patient or appointment record if you want to run a letter with a signature point
3. Right-clicking on any appointment in the diary

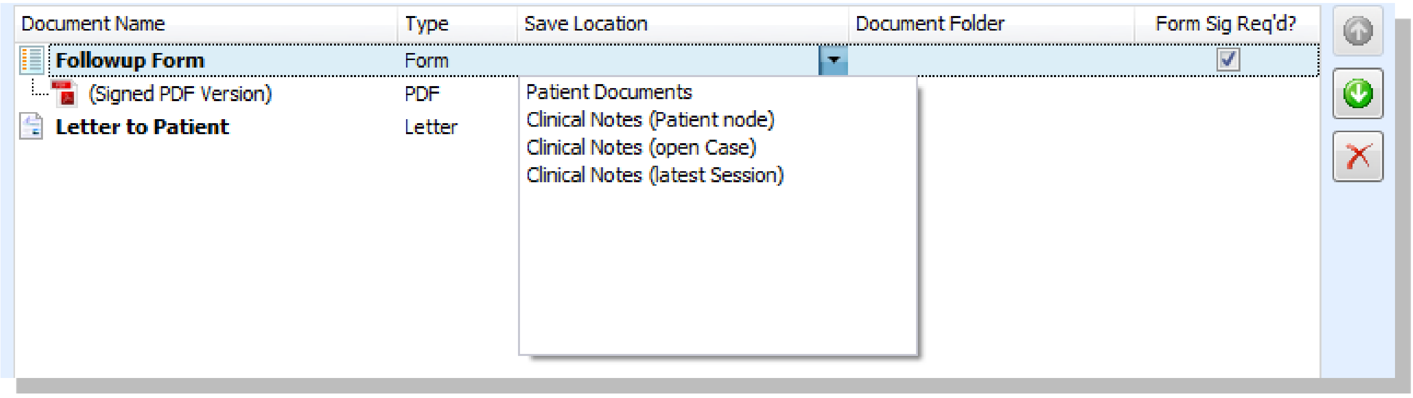
The latter 2 options simply bypass the need to select the document or patient.



Any forms that have been selected for online use from the Form Manager or letters with signature points will appear in either of the drop-downs above.

Load Template allows you to create a template for a form or group of forms and documents. This is useful if you frequently have to send a specific set of documents to your patients. For example, maybe you need to send out a welcome pack. To create your own document group, simply add your list of forms/letters to the generator, and then click the '**Save**' icon. Give your template group a name, and then in future, simply click **'Load Template**', select your template group, and your document pack will be loaded in ready to be sent to the patient. The nice thing is that the template group can also store information such as whether a signature is required, the save location and whether a patient consent is granted once this document group has been completed.

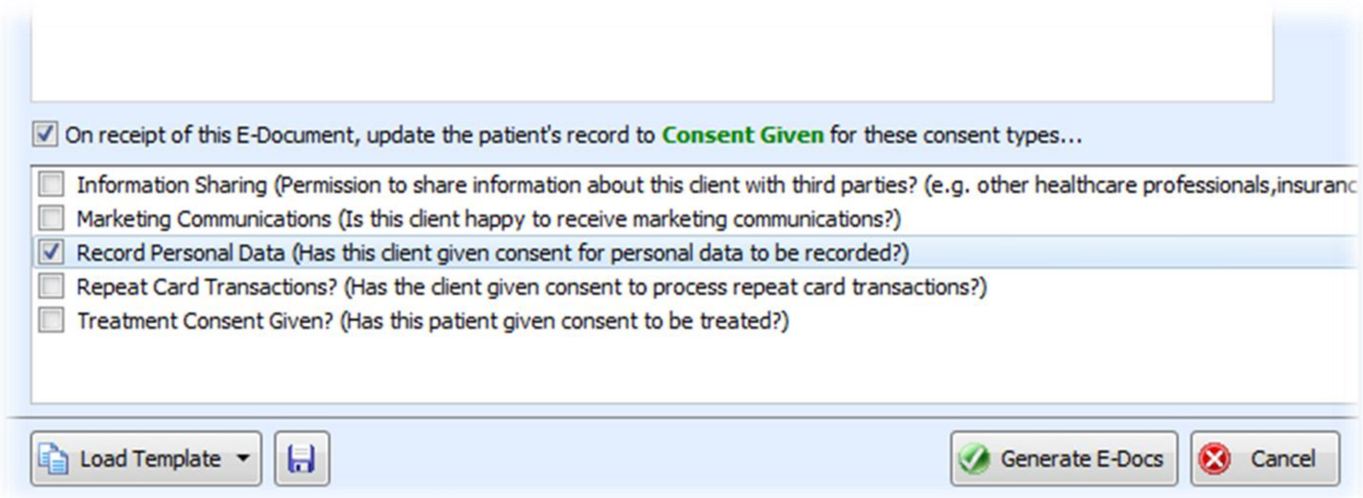
Document Ordering allows you to choose/re-order the documents as they will be presented to the patient. When you add more than 1 document to the list, you will notice the arrows to the right side of the screen turn green *(see image below).* Use these arrows to change the order.



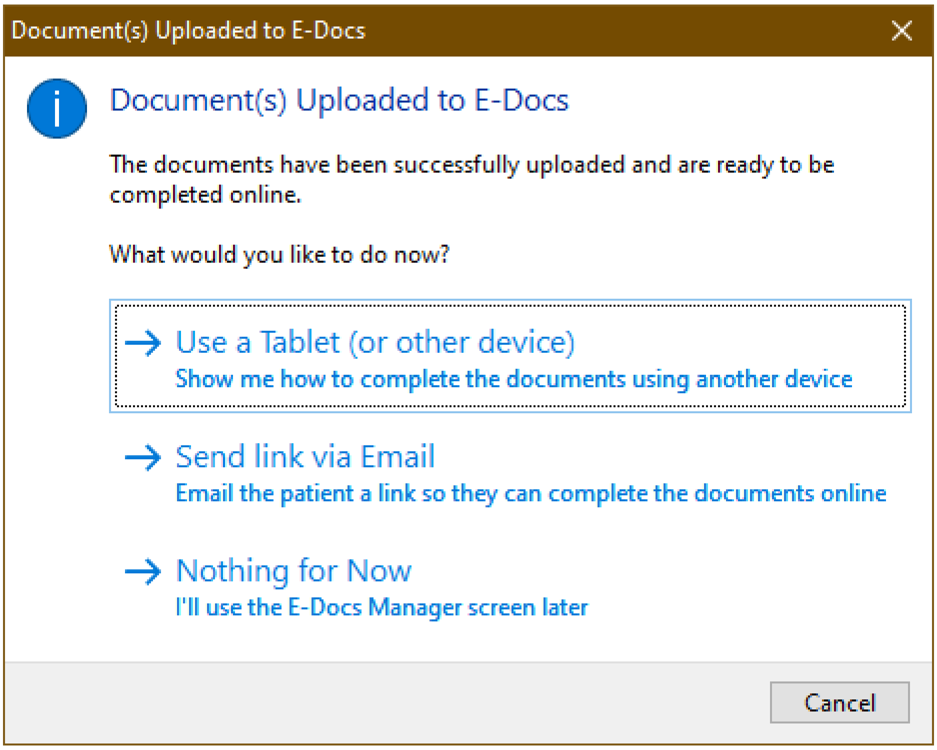
Save Location allows you to choose where the completed document will be saved. With forms, depending on whether you have selected an 'Admin' or a 'Clinical' form will depend on what is avaliable here. An 'Admin' form can only be saved to the "Patients Documents" and a 'Clinical' form can only be saved to a "Clinical Notes" location. Letters can be saved in any of the mentioned locations.

Form Signature Required allows you to capture a signature relating to the form that the patient has just filled out. If ticked, ClinicOffice will then create an additional PDF version of the file with the signature of the patient. This is so that the document cannot be tampered with subsequently. You can also choose to save the PDF version in a different location from the form itself.

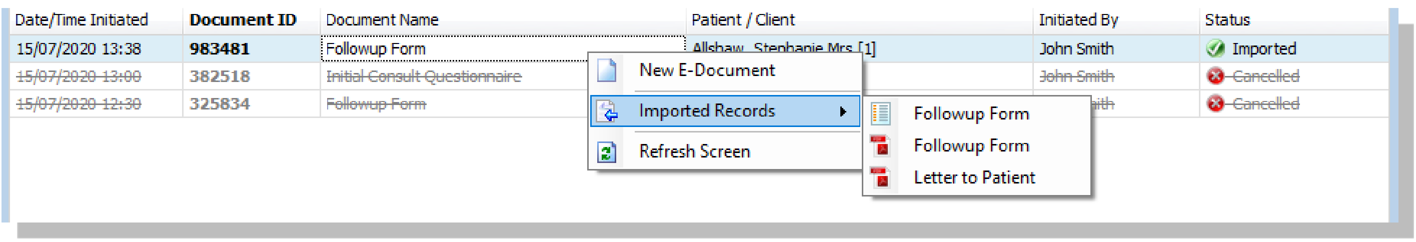
Update Patients Consent will allow you to specify that once this form, letter or document template group has been completed then automatically mark a consent or consents as being given by the patient. These options are given to you when you tick the "On receipt of this E-Document, update the patient's record to **Consent Given** for these consent types.." option. From there your required consents will be displayed and you can select which one is applicable for this form, document or templated group.



Once you are happy with everything, you can click ‘**Generate E-Docs**’. You will then be asked if you want to send the document via an email link, hand the patient a tablet there and then or just save it for later (see image below).



Once the patient has returned the document, you will see the completed status pop-up as mentioned in **Section A** of this guide, or you can go straight back to the E-Docs Manager window, and you will see it there (as below). You can then press the ‘**Import Completed E-Docs**’ button, and the documents will save to the location that you specified when you generated the E-Docs. *(This cannot be changed once you have submitted a document to the patient. If you make a mistake, you must cancel it, and recreate the E-Document.)*



Once the document has been imported, you can view these records by right-clicking on the log, going to **Imported Records** and selecting the relevant form or PDF document (as shown above).

Healthcode Insurance Billing

We have integrated within ClinicOffice Healthcode. This enables you to submit invoices securely to an insurance company electronically via the Healthcode system. For the leading healthcare insurers, this has now become the preferred method of billing. It reduces the number of returned invoices compared with sending them yourself directly to the insurer and leads to greater efficiency for your clinic. There are no additional charges for signing up to Healthcode.

To use Healthcode, you will need the following: -

- Healthcode account with Site ID
- The relevant insurer provider number
- Industry Standard Codes

Setting up Healthcode

If you already have a Healthcode account, you can enter these details into ClinicOffice by following the steps below.

1) Go to the **View** menu (tab) within ClinicOffice

2) Click the **Program Settings** button

3) Click the **Global Settings** tab

4) Towards the bottom left click the blue link "**Setup Healthcode Billing**"

The main "Account Settings & Defaults" screen will now appear.

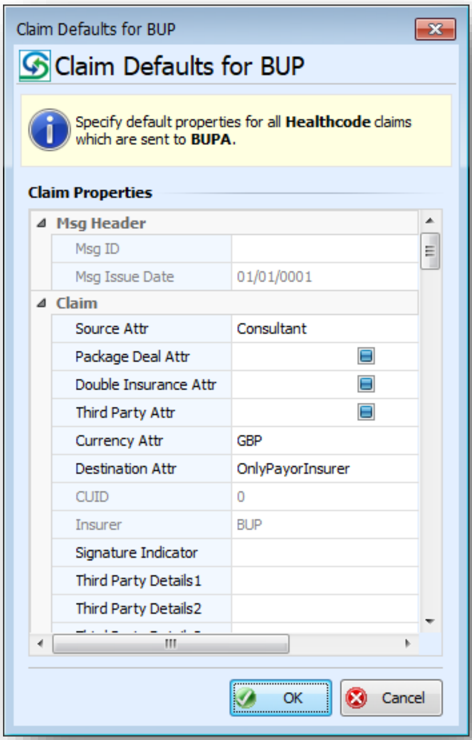
5) Please enter in your account's **Site ID**, **Username** and **Password**

6) Test that your account details are correct by clicking the "**Test connection to Healthcode**" button

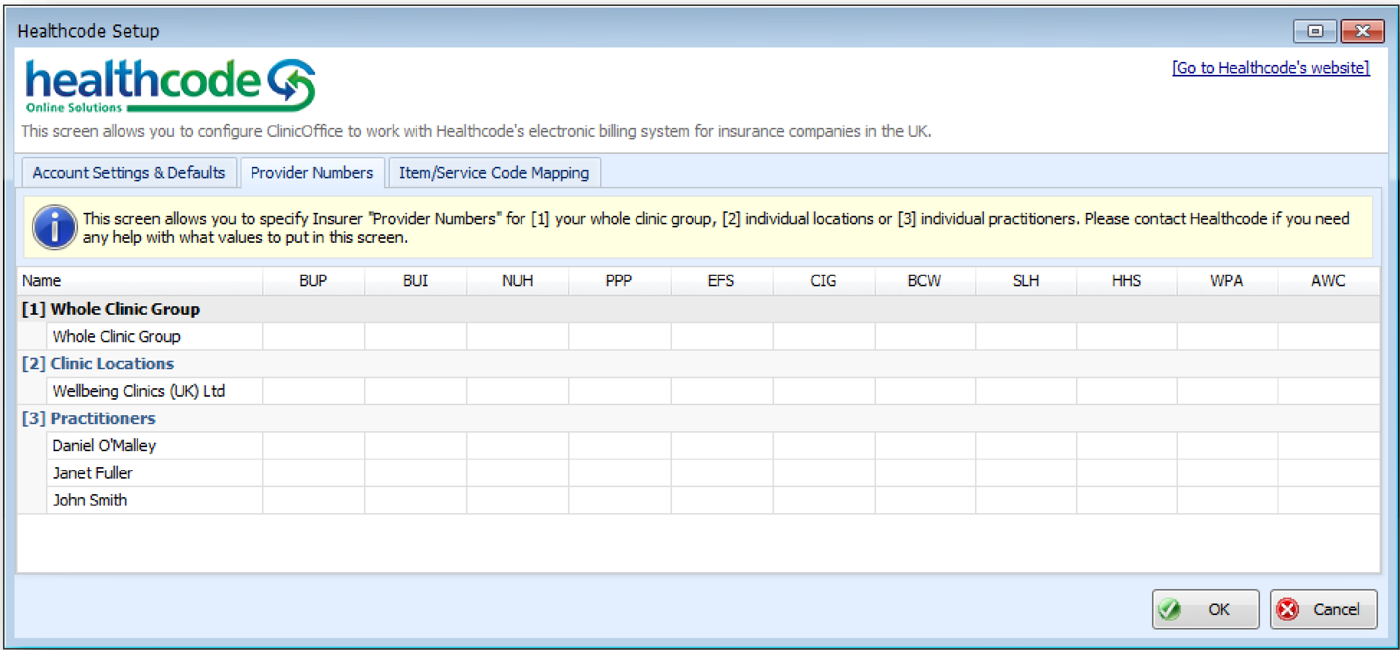
NOTE: If you do not already have a Healthcode account, then you can always click the "**Contact Healthcode**" blue link to get in contact with them to setup a new account.

You will note that at the bottom of the Account Settings screen is a section called “**Default Claim Properties**”. Within this section are different links to the relevant insurance company’s properties. For example, when you click on BUPA the screen to the right will appear.

The settings within this screen will always override your other claim settings for the insurer you are looking at. Generally, you will not need to touch this screen unless you are instructed by Healthcode to change a value within your claims. For example, an insurance company might require an Authorisation Code so you would insert such a value into this screen.



7) Click on the **Provider Numbers** tab and enter in your relevant provider numbers



If you do not know what your provider number is then Healthcode will be able to provide you with this.

You will note that each insurance company is represented by a three-symbol code; however, these abbreviations are not always obvious in what they represent. A key chart for this is displayed below.

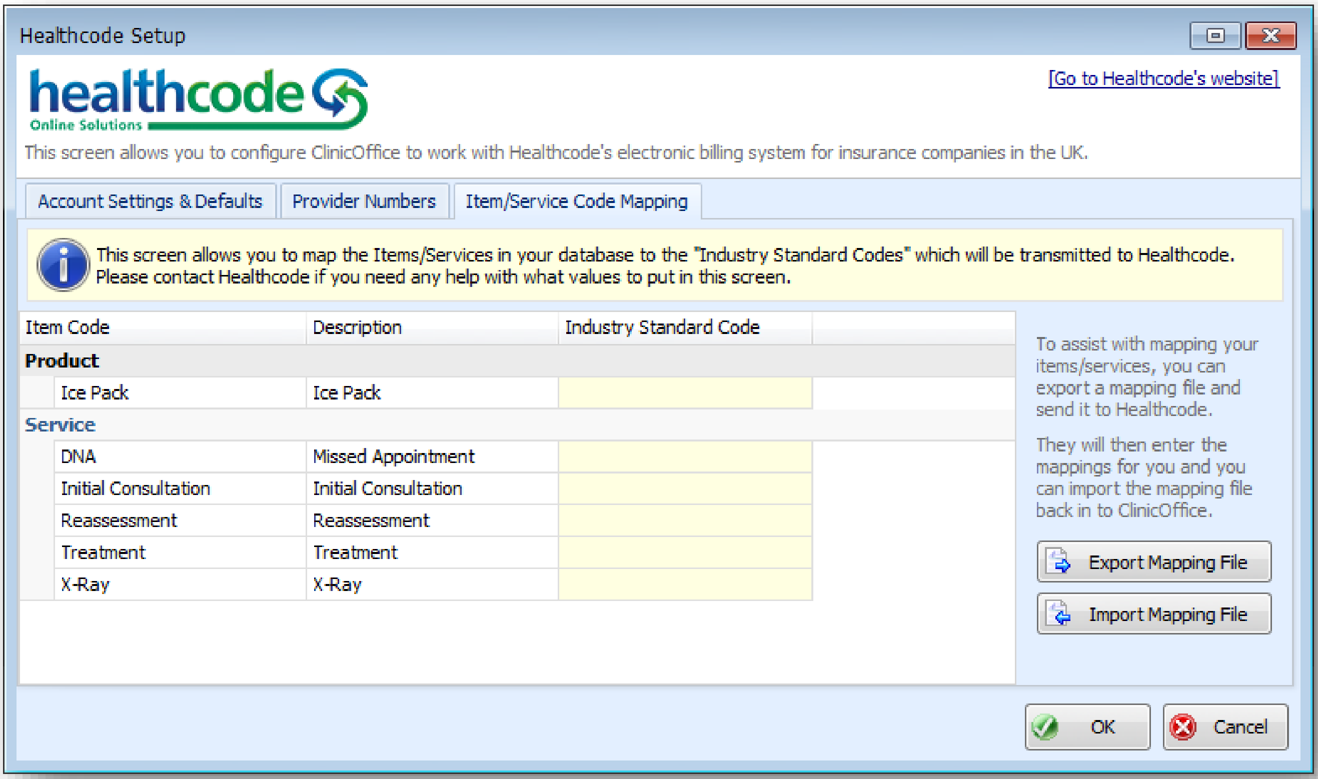
Insurer Code	Insurer Name
BUP	Bupa
BUI	Bupa International
NUH	Aviva
PPP	AXA PPP
EFS	Exeter Friendly Society
CIG	Cigna Healthcare

Insurer Code	Insurer Name
BCW	Simplyhealth
SLH	VitalityHealth
HHS	Healix Health Services Ltd.
WPA	Western Provident Association
AWC	Allianz Worldwide Care

8) Next click on the **Item/Service Code Mapping** tab

You will note that you have three columns; the first two are pulled from your items and services grid and are stored within ClinicOffice. The third column is where you would put the industry standard codes. The reason for this is that Healthcode will not know what your individual items or services represent when you are submitting an invoice.

9) From here enter in the industry codes for the services that can be claimed for and click **OK** once finished



NOTE: The Industry Standard Codes can be obtained from Healthcode if you do not already have them. To assist you with this you can click the **Export Mapping File,** save the CSV file locally and email it through to them. Once this has been filled in click the **Import Mapping File**, locate your CSV file, select it and click open. The relevant codes will then be filled in.

By following the above steps, you will unlock the Healthcode Manager within ClinicOffice. The next phase of the setup is to help ClinicOffice identify which contact is an insurance company.

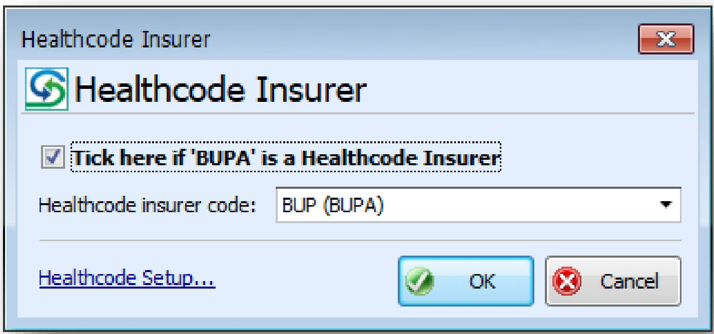
10) Go back to the **Home** menu within ClinicOffice

11) Click on the **Contacts** button to go to the contacts grid

12) Locate your insurance contacts, such as Bupa, AXA PPP etc. by using the **Search** button

13) Open the Insurance company's record and click the **Healthcode** button

14) Tick the checkbox present on the screen and select the **Healthcode insurer code** via the drop-down menu



15) Click **OK**

16) Repeat steps 12 to 15 for each insurance company you have on record

If you do not have an insurer on record but you will be billing them in the future you can create a new contact by clicking the **New** button within the Contact grid and from there enter in their details. Once done you can again follow steps 12 to 15. By doing this, when you now raise an invoice for an insurance company the option to submit to Healthcode will be available.

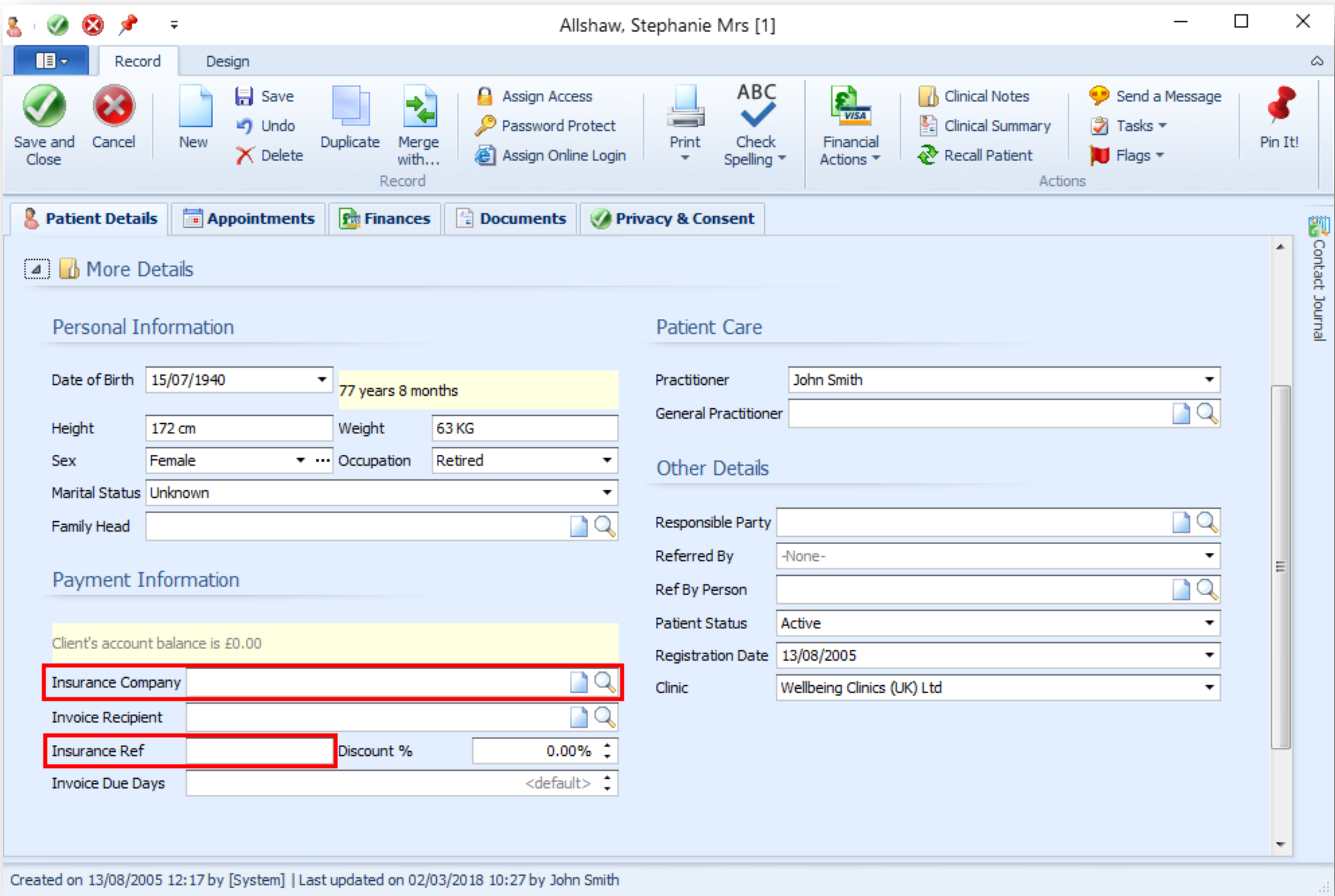
The last part of the setup phase is making sure the patient has the insurer marked as their insurance company and that they have an insurance reference entered. The next set of steps will go through this.

17) Within the main **Home** menu click the upper-half of the **Patients** button to go to the Patients grid

18) Open a patient's record by double clicking on it

19) Unless customised, expand the "**More Details**" group

20) Under the Payment Information fill in both the **Insurance Company** and **Insurance Ref** fields



21) Click **Save and Close**

22) Repeat steps 18 to 21 for each patient that is paying via their insurer

The above steps are the main prerequisites that will enable you and your company to submit invoices to your insurer via Healthcode. There may, however, be times when the invoice will still fail. We will now consider this part way through the next subsection.

Submitting Invoices via Healthcode

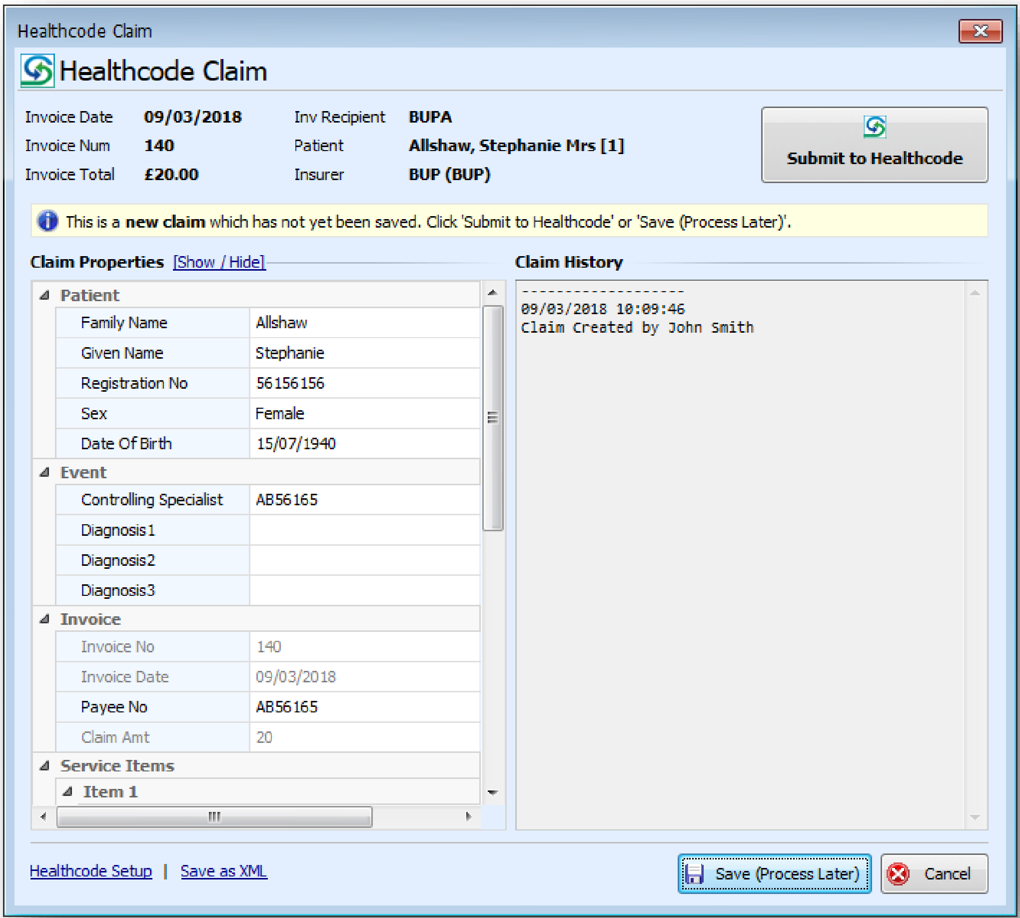
In this section we will consider how you would raise an invoice and then submit it to Healthcode. If you have not already setup your Healthcode account within ClinicOffice then it is advised that you follow the previous section "Setting up Healthcode".

The scenario we will consider is that an appointment has been completed for a patient that has insurance and now an invoice needs to be raised and then submitted to Healthcode.

1) Go to the patient's appointment within the Diary
2) Right-click on the appointment and select **Create Invoice**
3) Select to "**Invoice the patient's Insurance Company**" (i.e. Invoice: BUPA)
4) If you have a default charge item that you wish to use click **Yes** to the next message

If you do not have a default charge item for this appointment type then you can add a service to the invoice by pressing the small **+** symbol at the bottom of the "Invoice Items" and then selecting the item via the Item Code column. For more information on how to add a new invoice line please see the section "Adding Lines to an Invoice". If you wish to know how to create a default charge amount for an appointment type please see the section "Creating a New Appointment Type".

5) Once the correct charge amount has been inserted click the **Healthcode Claim** button



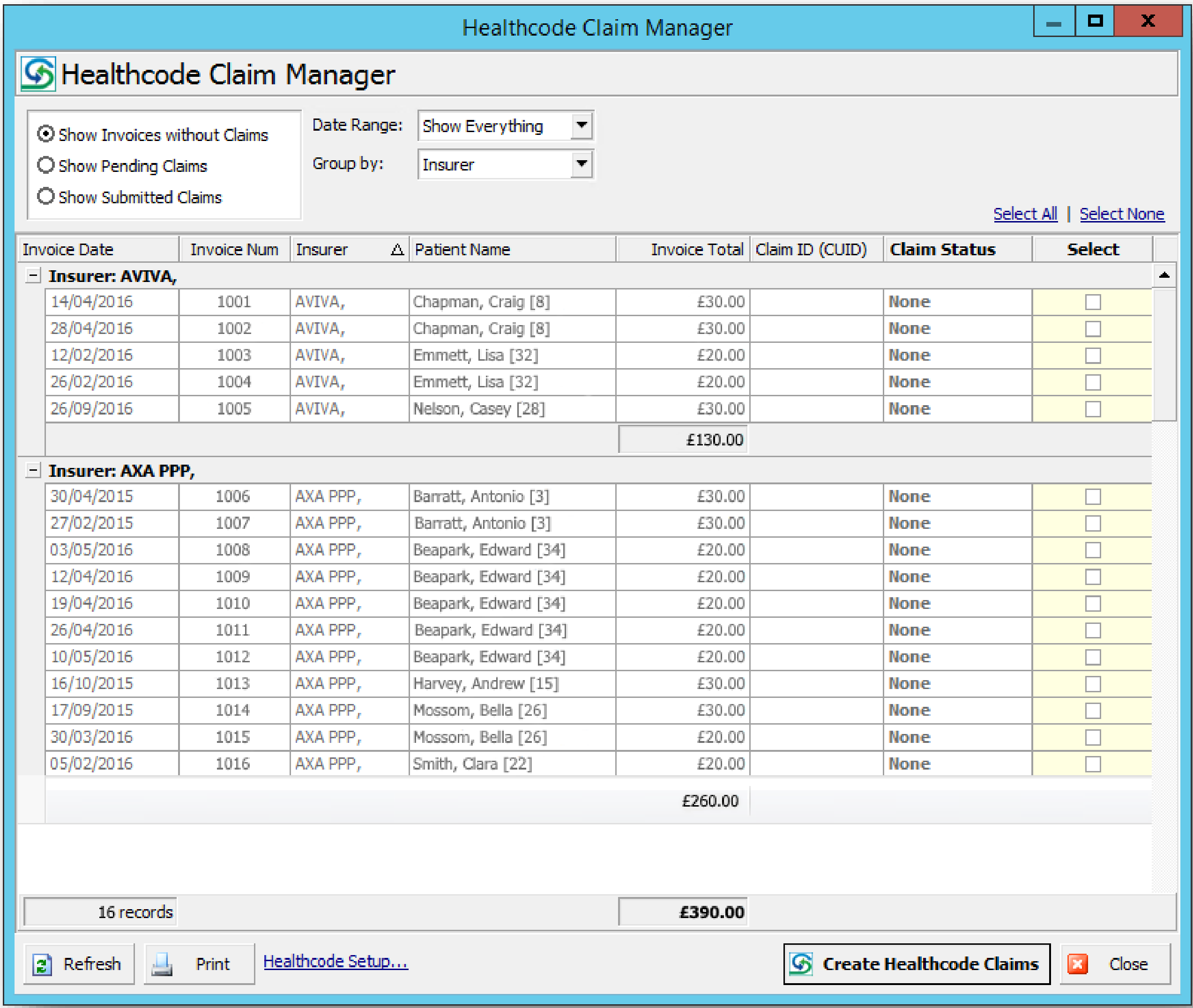
6) This should bring up the Healthcode Claim window, click **Submit to Healthcode**

So long as your setup is correct the claim will automatically be submitted. If, however, something is missing from your setup then an error message will appear under the "Claim History" section, this is usually self-explanatory. If you do need assistance, please contact either Healthcode or Pioneer Software (customers on our support plan can call or email our support team, non-supported customers can post for free on our support forum forum.clinicoffice.co.uk).

Healthcode Claim Manager

Using the Claim Manager, ClinicOffice provides you with a way to overview your submitted claims, claims that are pending and invoices that are without any claims. You can access the claims manager by clicking on the lower-half of the **Finances** button and selecting **Healthcode Claims**. Alternatively, you can access it by going to the **Tools** menu and clicking the **Healthcode Claims** button there. This will bring up the window below.

Healthcode Claim Manager – Without Claims

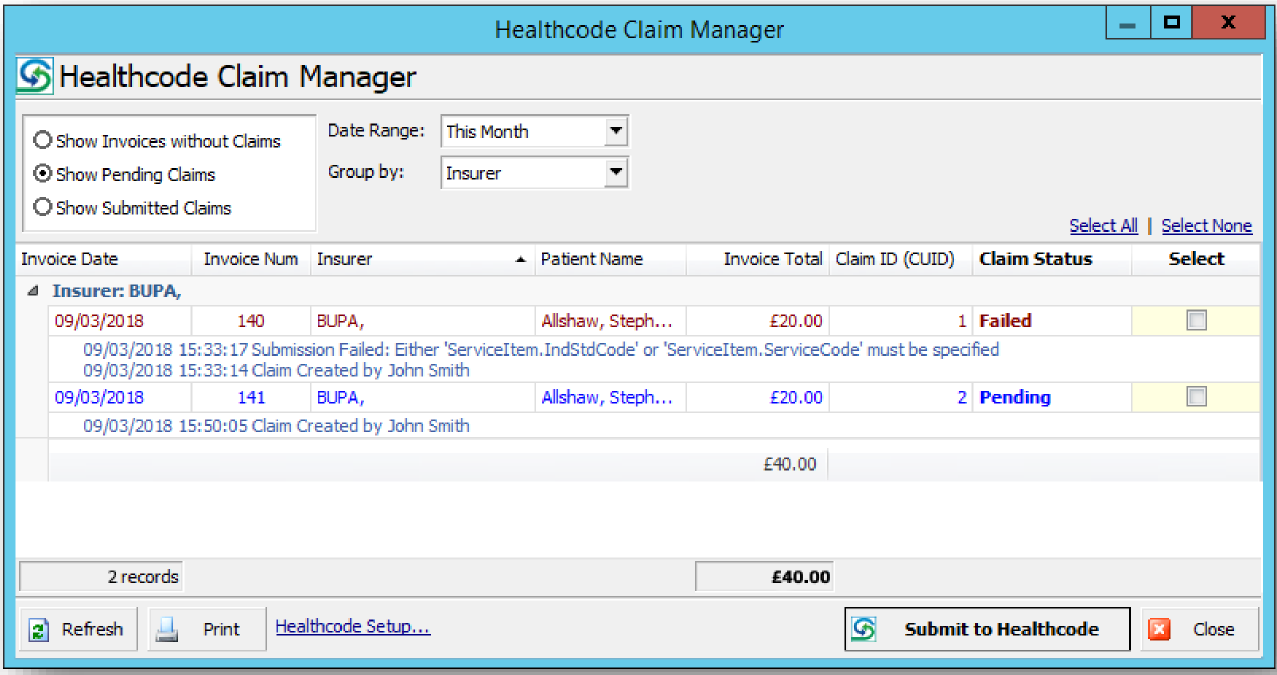


The first screen that you will see when opening the Healthcode Claims Manager are the invoices that are without a claim. So, these are invoices that qualify to have a claim because they are invoiced to an insurer registered with Healthcode but as of yet, a claim has not been raised. If you always submit a claim to Healthcode whenever raising an invoice then this screen will be empty, however, this screen does provide you with an alternative way to create claims on bulk. You can do this by clicking the "**Select All**" link if you wish to create a claim for all the invoices or tick the checkbox under the "Select" column for individual invoices and click the **Create Healthcode Claims** button. This screen is also useful because it allows you to check that the invoices that need claims have been created.

The Claim Manager will allow you to select a date range for your claims. By default, the grid is grouped by the "Insurer" but you can change this so that the claims are grouped by "Month" or remove the grouping altogether. You can also right-click on an invoice and select to open it. In the next two screens we will consider the right-click menu will also allow you to open the individual claims as well. You can also access the main Healthcode Setup screen from the blue link towards the bottom left.

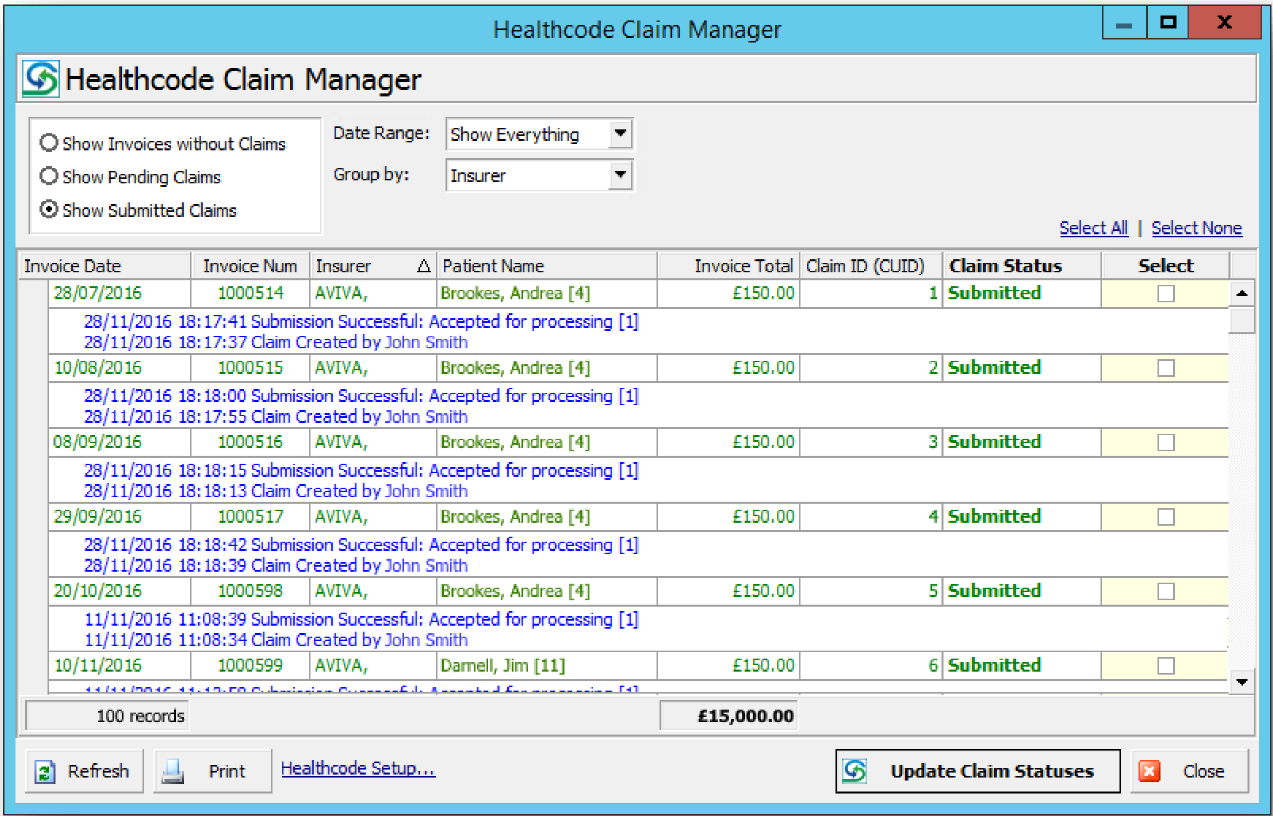
If you are in the process of a claim and have not had time to complete but decide to save it or the claim has failed for a reason, then these claims will show on the "Show Pending Claims" section of the Claim Manager. The next screenshot demonstrates this.

Healthcode Claim Manager – Pending Claims



By looking at the screen above the status of the claims become evident. A "**Failed**" status is highlighted in red and a message of why the claim failed will be visible below the claim line. In the example above the reason for the failure is that the invoiced item has no industry code assigned to it. A "**Pending**" status is highlighted in blue and will display when the claim was initially created. You can correct or complete a claim by right-clicking on the claim, select **Open Claim**, make the needed adjustments/corrections and click **Submit to Healthcode**. All being well your claim should go through.

Healthcode Claim Manager – Submitted Claims



The last section of the Claim Manager is the "Submitted Claims" and these are claims that have been successfully submitted to Healthcode. Now, all that you need is to wait for the insurer to either pay the submitted claim or indicate why they are unable to. Once this has been received the Claim Status will change to "Collected by Insurer".

Audit Trail

In all editions of ClinicOffice, whenever a record is created or updated a note is made within the database of who created it and who updated the record. It will also tell you the date and times of this. Such information will be visible at the bottom of the relative records. If you wish to see a more thorough breakdown of what was updated, then this is where the Audit Trail comes into play.

As the audit trail feature records any changes and keeps a record of past information as well, it does mean that more reads and writes to the database are made. As this is the case, the audit trail is available only for the **Server** and **Hosted Editions** of the software.

How to Turn on the Audit Trail

The Audit Trail is set to a basic audit by default. This records changes made to the appointments, clinical notes, invoices, payments, patient and staff records. If you want a more system wide audit trail, then you can do this by following the steps below.

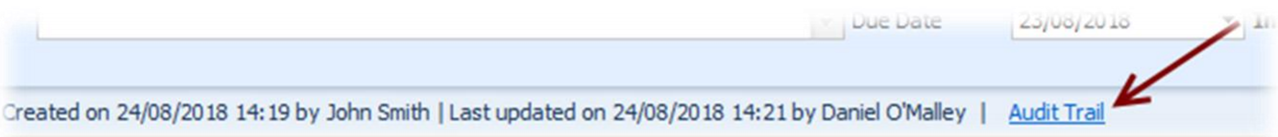
- Go to the **View** menu in ClinicOffice
- Click the **Program Settings** button
- Go to the **Global Settings** tab
- Click the link **Audit Trail Settings…**
- Select the option "**Comprehensive Audit**" checkbox
- Click **OK** and **OK**

From this point on, any changes made within ClinicOffice will be recorded. This also includes any text removed or any record deleted.

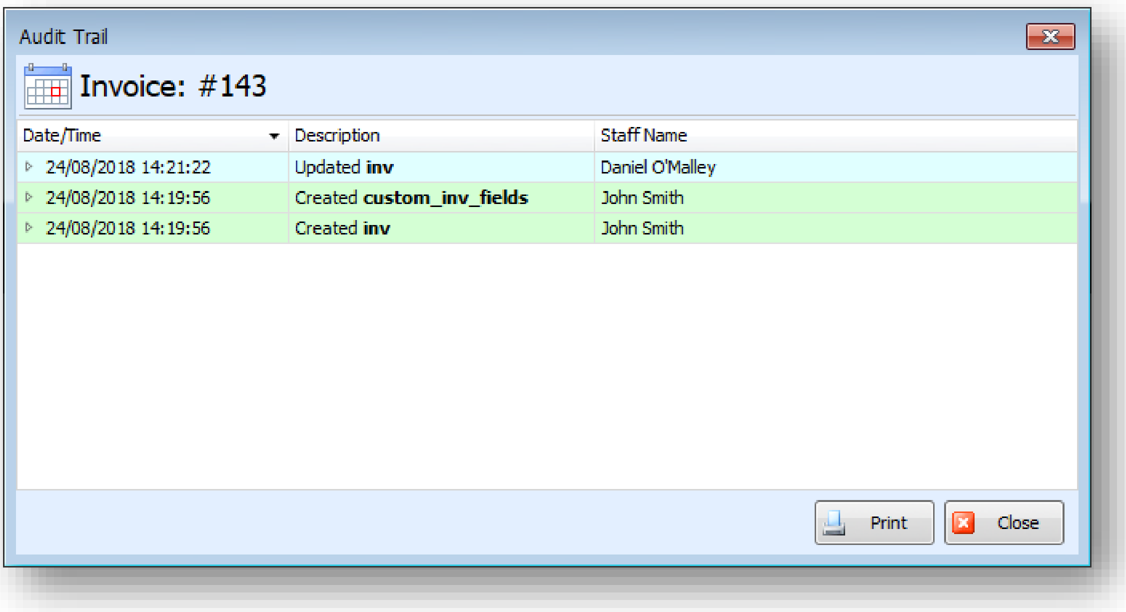
Audit Trail on an Editor

There are two ways you can view the audit history. The first way is via the individual record. If you open up nearly any editor within ClinicOffice, at the bottom of that editor there will now be an Audit Trail blue link present (see example below).

Audit Trail Link Location

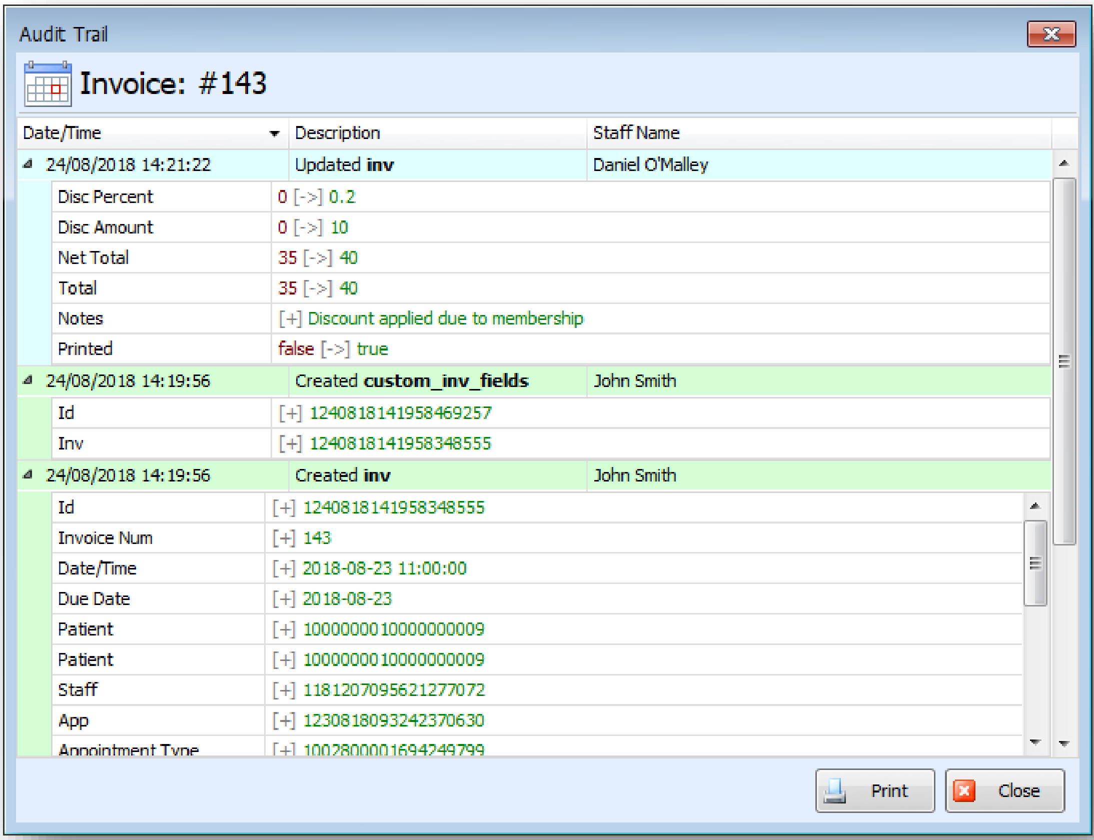


When you click on this link, a window such as the one below will appear.



In the example given above, this is an Audit Trail window for the Invoice Editor, but the Audit Trail window for any editor will be pretty much the same. You will note that there are three columns the **Date/Time**, **Description** and **Staff Name**. The **Date/Time** will tell you when the creation or update took place for this record. The **Description** is a brief statement of what has occurred, for example the record was 'Updated' or the record was 'Created'. The **Staff Name** displays the member of staff that has performed the action of either updating or creating the record. This screen also shows any linked information to the record such as the custom fields.

You will note that each line has a small arrow present to its left. By double-clicking on a line, it will present you with further information, like the example below where all three audit lines of the invoice audit history have been expanded.



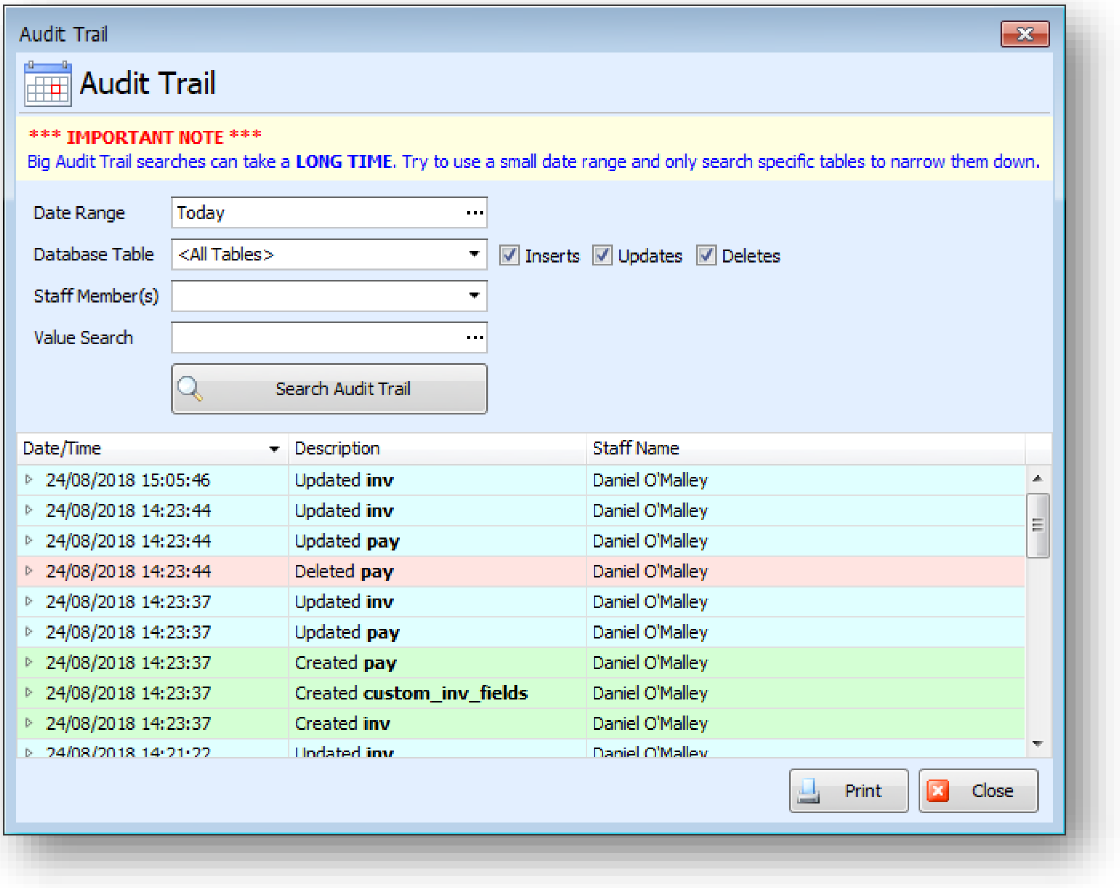
Within the expanded information there will be each field that has been either added to or modified. This displays all changes made to the current record. If no information has been entered or changed within a field on the editor, then no information is recorded into the audit history, because there is nothing to record for that field.

You will note that to the right of the field name are little symbols present. There are three different symbols altogether and these are explained in the table below.

Audit Symbol	Description
[+]	The 'plus' symbol means that a new value has been added to the current field.
[–]	The 'minus' symbol means that a value has been deleted from the field and the field is now empty.
[–>]	The 'change to' symbol means that the value has been replaced. Old previous values are displayed in red text and new values are displayed in green text. If we take the Total field within the image above, it has the old red value of "35" and it is being changed to "40" which presented in green text and the "**[–>]**" symbolises the transition.

Audit Trail Manager

If you need to see the audit history for the entire database, rather than for a single record, you can do so by going to the **Tools** menu and clicking the **Audit Trail** button. The window below will appear.



The Audit Trail Manager screen allows you to either view a larger range of auditing information or a more specific area. The fields and their functionalities are explained more in the table below.

Field Name	Functionality
Date Range	Allows you to search on the audit history for either a specific date or a range of dates.
Database Table	You can search on either all tables or look at a specific table within the database. This is useful if you are looking to see changes made to an area of the database such as changes made to appointments or to the patients. You will also notice three additional options: **Inserts**, **Updates** and **Deletes**. By default, all three are ticked. You can untick any one of them to refine your search. So, for example, if you only want to see records that have been deleted you will untick the other two options and leave the “Deletes” checkbox ticked.
Staff Member(s)	This allows for you to search on the staff member that has performed the changes. This field can be used if you wish to monitor changes a staff member has been making to the system throughout the day.
Value Search	This will search on records that are linked to a patient or contact record. So this could be either used directly for searching on the patient or contact’s record or any linked records such as appointments or invoices for that individual. Once you have selected the person you will note a long number is inserted into the Value Search field this is the internal ID the database will use to find the associated records.

Once you have entered in your search criteria, click the **Search Audit Trail** button. As indicated, the wider the search range, the longer the search will take to complete. Should you wish, you can also click on the **Print** button to print this screen or to export it to PDF, CSV or some other format.

You will note that the grid is colour coded. Anything highlighted in a **GREEN** colour indicates that a record has been created; any lines in **BLUE** indicate that a record has been updated and any lines highlighted in **RED** indicate a record has been deleted.

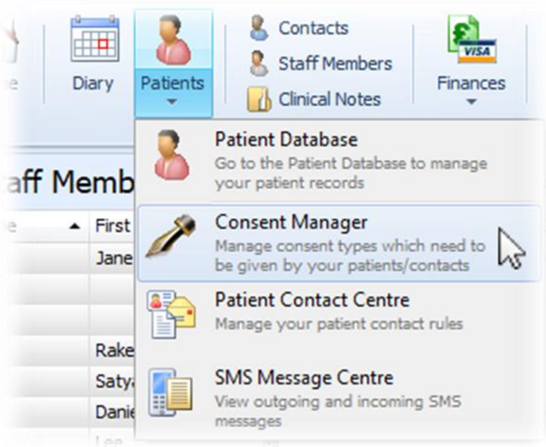
Managing and Recording Consents

With the advent of the GDPR (General Data Protection Regulation) seeking a patient's or contact's permission to store their data or the right to contact them is ever more paramount. To help you with this we have added a consent management system. This consent system will allow you to mark and keep a track record of consent for each patient and contact. You can add your own consent types and even allocate consents for specific appointment types. Should you wish ClinicOffice will also bring up a reminder when you open a patient's record or create a new appointment that certain consents have not been agreed to as of yet.

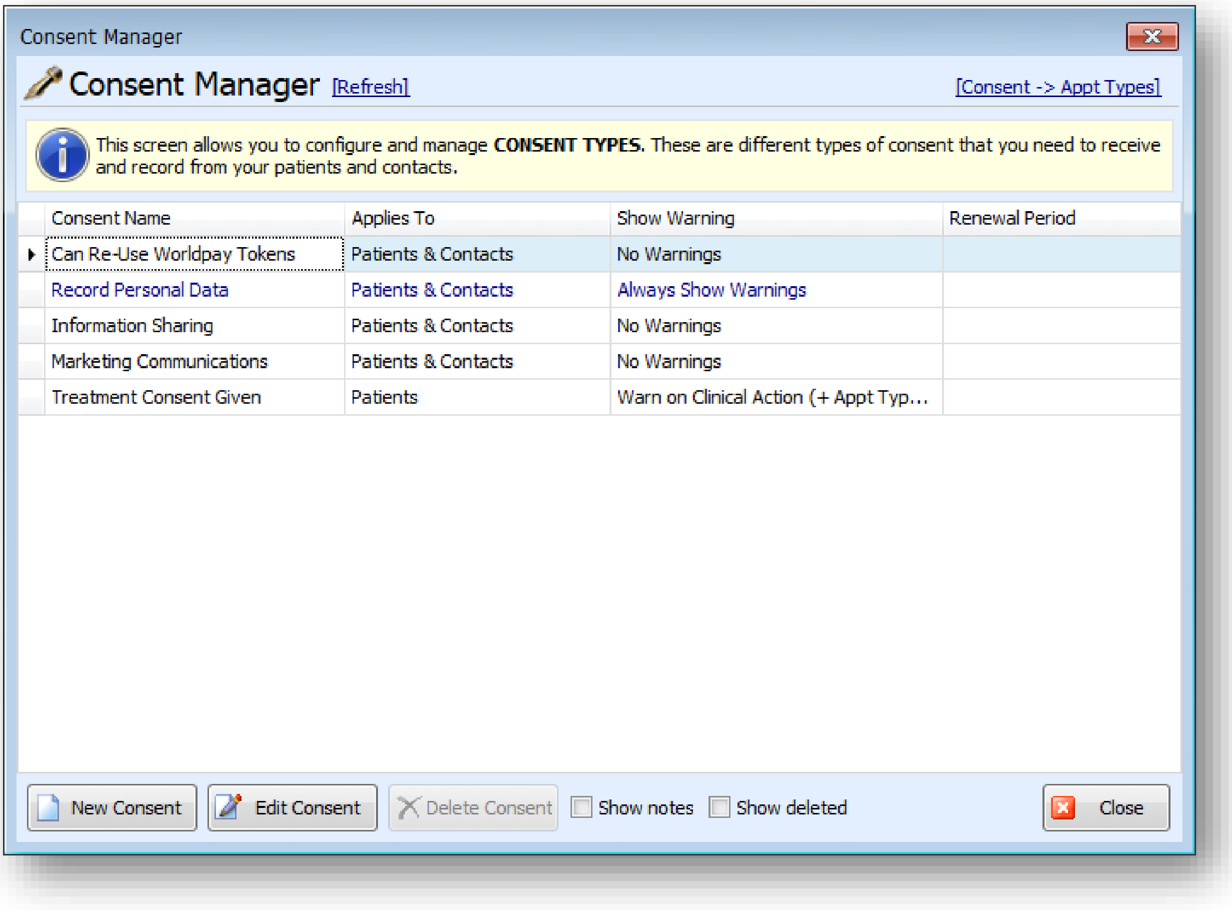
Consent Manager

To understand what consent types are already available you will first need to visit the Consent Manager. The Consent Manager can be accessed by going to the **Home** menu, clicking on the lower half of the **Patients** button and clicking **Patient Consent** Manager.

Opening Consent Manager



The consent manager screen will now appear.



From this screen you can add new consents, edit existing consents and delete unwanted consents. You can view the notes made about the purpose of the consents by ticking the “Show notes” checkbox. You can see disused consent types by ticking the “Show deleted” checkbox. You can also manage the appointment types a consent is assigned to by clicking the blue link “Consent -> Appt Types” (toward top right).

You will note that on the first time opening the consent manager there are already default consent types present. Their purposes are listed below.

Consent Name	Applies To	Show Warning	Purpose
Can Re-Use Worldpay Tokens	Patients & Contacts	No Warnings	You will need to gain a patient’s or contact’s permission in order to be able to re-use their card details for future transactions. Without this permission you would need to retake their card details each time they come to make a payment.
Record Personal Data	Patients & Contacts	Always Show Warnings	With this enabled you have permission to store and record information on the patient or contact. A warning message will appear whenever you open their record or create an appointment for them until you have recorded that permission has been given.
Information Sharing	Patients & Contacts	No Warnings	Used for when permission has been granted by the patient or contact to share their information with third parties.
Marketing Communications	Patients & Contacts	No Warnings	Used for when permission has been granted by the patient or contact to send them things such as newsletters or special offers.
Treatment Consent Given	Patients	Warn on Clinical Action + Appointment Type Warnings	To be used when consent has been given to allow you to perform treatment on the patient. A warning will only appear when creating and saving a new appointment for a patient without consent.

Q. I do not need all of these consent types can I just delete them?

A. If you do not require a consent type then yes you can delete it by right-clicking on the consent and selecting **Delete Consent Type**. A Consent Type is never truly removed because the audit links created within the database but it will be hidden from view and no longer used once marked as deleted. The only two consents that you cannot delete are the “Can Re-Use Worldpay Token” and “Record Personal Data”.

Q. I do not wish to delete the consent types but is there a way to stop the consent warning messages from appearing?

A. To prevent consent warning messages from appearing right-click on the consent type and select **Edit Consent Type**. Set the “**Warnings**” field to “No Warnings”. Also click on the **Set Appt Types** button within the Consent Type editor and make sure that no appointment types are ticked. Repeat this for each consent type.

Q. Is there a way of disabling the consent system?

A. Yes there is. To do this, go into the Consent Manager and tick the option “Disable Consent System”. You will no longer have any consent warnings, regardless of the individual consent settings.

Creating New Consent Types

1) Click on the lower half of the **Patient** button and click **Consent Manager**

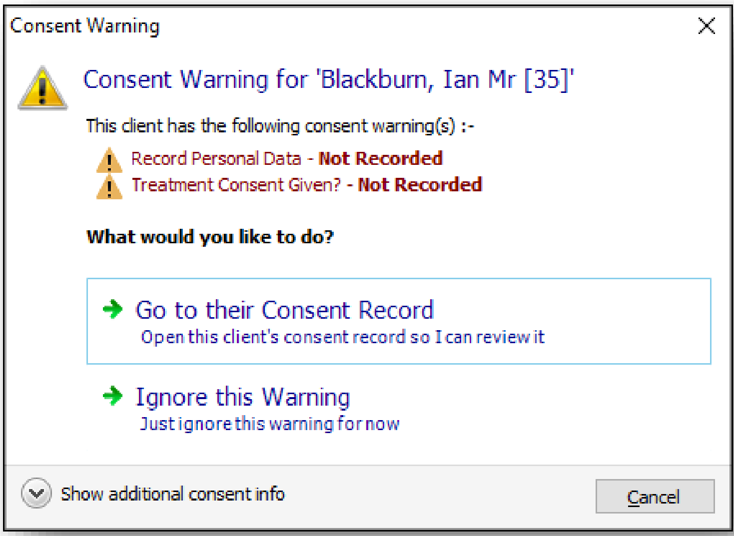
2) Click the **New Consent**

3) Give the new consent a name

4) Select who this applies to (Patients, Contacts or Patient and Contacts)

5) Set whether you want a warning message to appear and where you wish it to appear

Q. What do you mean by warnings?



A. A consent warning is where a message will appear within ClinicOffice warning you that a patient or contact has not granted consent for a particular purpose. Within the Consent Type Editor, there are 4 different Warnings, and these are: No Warnings, On Admin Actions, On Clinical Actions and Always show Warnings. These will affect where the consent warning will appear.

If the consent is set to "**On Admin Actions**" then a consent warning will appear for the patient whenever a new appointment is created, closing their record or linking them to another record. If the consent is set to "**On Clinical Actions**" then the warning will appear whenever you go into the patient's clinical notes. If you set the consent to "**Always Show Warnings**", then the warning message will appear whenever an admin or clinical action is performed for the patient.

If the consent has been set with a warning to appear then by default the warning will activate when the consent has not been recorded, when the consent was declined and when the consent has expired. The warning will stop once the consent has been recorded.

6) If the consent given is only valid under law for so long, then you can set for the consent to expire after a period via the **Expires After** field

Q. I cannot set my own custom expiry period for the consent?

You will note that by default the "**Expires After**" field only has the values 6 months, 1 year; 2 years, 3 years; 5 years and 7 years. You can type your own custom expiry period though. For example, if the consent is only valid on the day of treatment, then you can type into the field "**1 day**" (without the quotes). If the consent expired after two weeks, you can type "**2 weeks**" (again without the quotes). The system will recognise this text. All you need to do is enter in the number and then the period i.e. days, weeks, months or years.

7) Enter in any notes to explain what the consent is for [this is not required]

8) If you require for the consent warning to appear only for certain appointment types, then click the **Set Appt Types** button

9) Tick the appointment types you want the warning to appear for and click **OK**

10) If you are happy with everything click **OK** again

Your new consent type will be created and will take effect immediately.

Recording Consents

Once the patient or contact has given you consent for one of the consent types you can record this within ClinicOffice on their record. The steps below will assist you with this.

1) You can do this by either clicking on the "**Go to their Consent Record**" when the consent warning message appears or directly open their record and go to the **Privacy & Consent** tab

2) Click the **Update** button to the relevant consent i.e. if it was Marketing Communication you would like Update on that

3) If consent is given, select **Consent Given** and if they have declined then select **Consent Declined**

4) To the right of this is a text field, either type in how the consent was given or select from the drop-down list of predefined note values [see image below]

Recording Consent within Patient's Record

5) Click the **Save** button

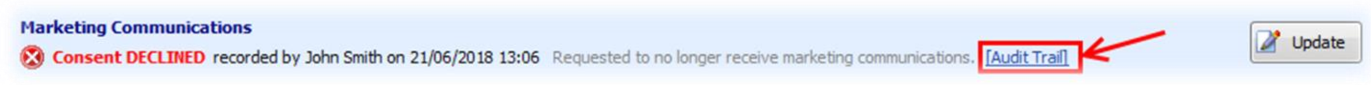
The consent will now be updated and saved to this record.

Q. How do I change or add new predefined notes for the consents?
A. To edit or add new consent note templates you can click the blue link "**Edit Note Templates**" which is at the top of the **Privacy & Consent** tab for both patients and contacts. From that screen you can add, remove and add new consent notes.

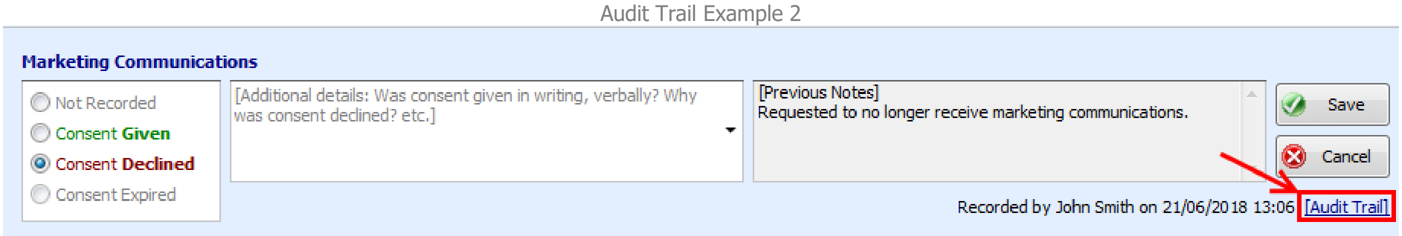
Consent Audit Trail

You may have noted in the previous section that when you record a consent being given or declined, that there is "**Previous Notes**" field section. This is a preview of notes recorded in the last consent for this consent type on the patient or contact you are looking at. These previous notes are a part of the Consent Manager's Audit Trail. Each consent type for each record stored on the database has its own audit trail. To view the full audit history, click the **Audit Trail** blue link on the consent (location varies, see examples below).

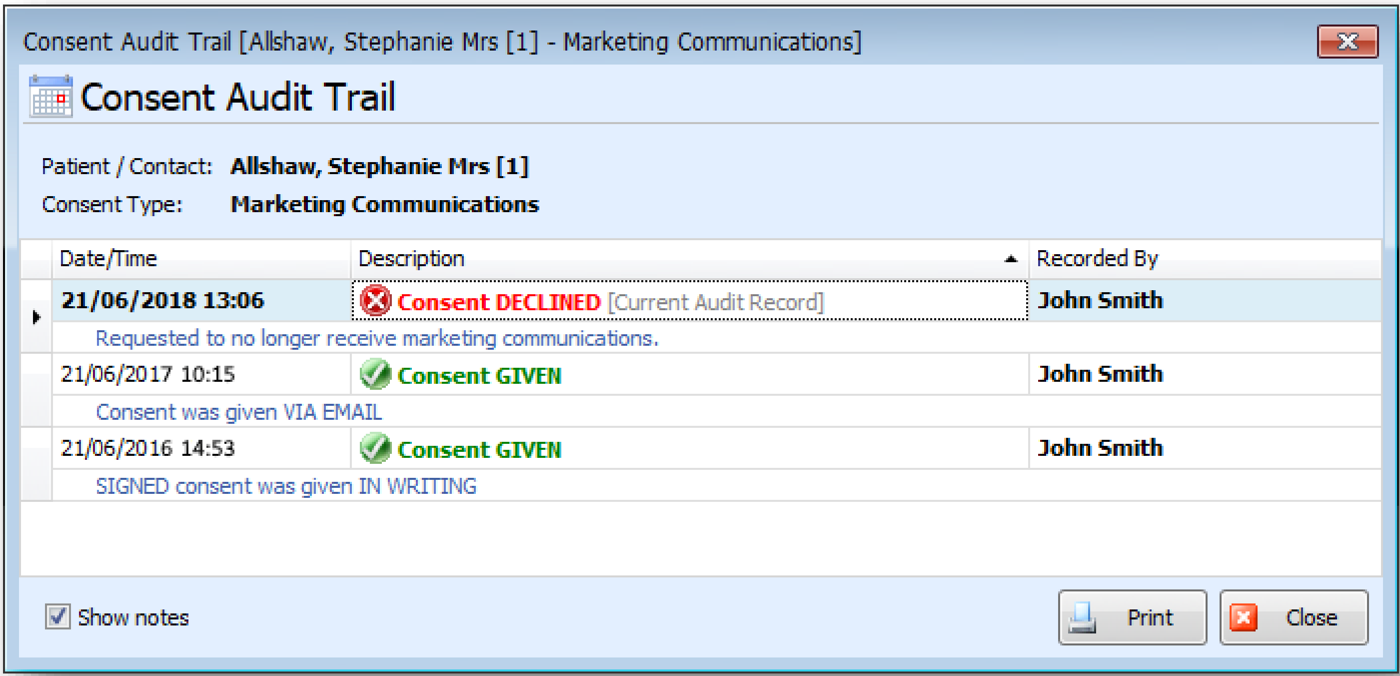
Audit Trail Example 1



Audit Trail Example 2



The Consent Audit Trail that appears will look like the window below. By default it will show the notes of current and past consent recordings. You will note that the current or latest consent note is marked with the grey label "**Current Audit Record**".



Should you wish to you can also print this screen by clicking the **Print** button. Past consent notes cannot be edited or altered in anyway.

Searching on Patient's and Contact's Consents

There are a three ways you can search on the consents for patients and contacts. These are listed below.

Option 1

You can search on the patient's or contact's consents via the Consent Manager. Doing it this way will search on each consent type separately. The steps below will show you how to do this:-

1) Click on the lower-half of the **Patients** button and click **Consent Manager**
2) Right-click on one of the consent types i.e. Record Personal Data
3) Go to Reports and select from there "Consent Report –Detailed (Contacts)" or "Consent Report – Detailed (Patient)", depending on what you want to search on

This will generate a list of ALL consents given, declined, expired and not recorded for this consent type and this will be throughout all history. You can click the Search button to refine the search further.

Option 2

An alternative method is to search on the consents directly via the patient's or contact's grid. The benefit to this is that you can specify the consent value i.e. "Consent GIVEN". The steps below will talk you through this.

1) Go to the Patients or Contacts grid by clicking on either the **Patients** or **Contacts** button
2) On the **Search** button, click on the arrow that is pointing down
3) Click Consent Search
4) Select the **Consent Type,** i.e. Marketing Communications
5) Select the **Consent Value,** i.e. Not Recorded
6) Click **OK**

Option 3

This third option is a variation on the first option, but you would instead access the reports directly from the Reports and Templates section of ClinicOffice. This overall provides you with the greatest flexibility for reporting on consents. The steps below explain how to do this.

1) Click on the **Reports and Templates** button on the **Home** menu
2) Scroll to Patient group of the Reports and Templates
3) Double click on one of the consent reports, i.e. "Consent Report – Detailed (Patients)"
4) If you want to specify the status or value of the consent type, put it into the Consent Status field, i.e. consent given
5) Type in the name of the Consent Type you want to search on, i.e. Information Sharing
6) If you wish to a date range, double click on the Other Search Fields to expand it open
7) You can specify the date within the Consent Date/Time field
8) You can also specify a number of other search criteria from here
9) Once happy, click the **OK** button

Updating Consents on Bulk

Generally, you should not need to update people's consent on bulk and it is sounder that you should do this on an individual basis instead. However, there are times, maybe for historical reasons or on the point of introducing a new consent type that you will need to update patient's consents on bulk. In this section, we will discuss two options on how you can bulk update people's consents using the Batch Update feature.

Option 1

The first option we will discuss is a way to bulk update consents across the entire database. This might be useful if you need to reset everyone's consent on marketing for example. The steps below explain how to do this.

WARNING! It is highly recommended that you backup your database before you proceed, as this cannot be easily undone.

1) Click on the lower-half of the **Patients** button and click on the **Consent Manager**
2) Right-click on the consent you wish to perform the bulk update on, i.e. Marketing Communications
3) Select **Batch Update....**
4) Click **OK** to the next message that appears
5) Set the consent status i.e. Not Record or Consent Given
6) Put a note on how consent was given or is not for that matter
7) Click **OK**, click **Yes** if you are certain of bulk updating these consent
8) Type in **Yes** and then **OK**, again only if you are 100% certain

Note: *When performing the batch update using Option 1, you will be updating either all patients, contacts or both depending on who the rule is to apply to. The Consent Manager will indicate this.*

Option 2

The second option will allow for you to search on a group of patients instead and to then perform the batch update on their consents. The steps below can be replicated for contacts via the Contacts grid as well.

Step1 – Searching on the Records

You will need to go to the Patients grid by clicking the **Patients** button. Once in there you can perform your search on the patients by clicking the **Search** button. If you wish to search for their current consent status, please follow Option 2 in the article "Searching on Patient's and Contact's Consents".

Step 2 – Updating the Consents

If you wish to update the consent for everyone currently on the grid, left-click on any record and press the **CTRL** and **A** keys together, this highlights everyone. Now right-click on any of the highlighted records, go to **Batch Update** -> **Patient Consent** and select the consent you wish to update for everyone selected. Like in steps 5 to 8 of Option 1, you can set the consent status and put a note for it. Click **OK,** type **YES** and then click **OK** again. All records that you have selected will now have their consent updated.

Destroy Personally Identifiable Information

Under article 17 of the General Data Protection Act (GDPR) it introduced the “Right to erasure”. This allows for the individual whom personal data is stored on to request for their data to be erased. Article 17 does, however, make clear that although the person has a right to request for erasure that only applies if there is no compelling reason for its continued processing. If you are of a medical profession then there likely is a very good reason for you to continue processing their personal data for the purpose of providing medical care. So in summary, your right to retain the data overrides their request for their data to be removed so long as you have a valid reason to keep it.

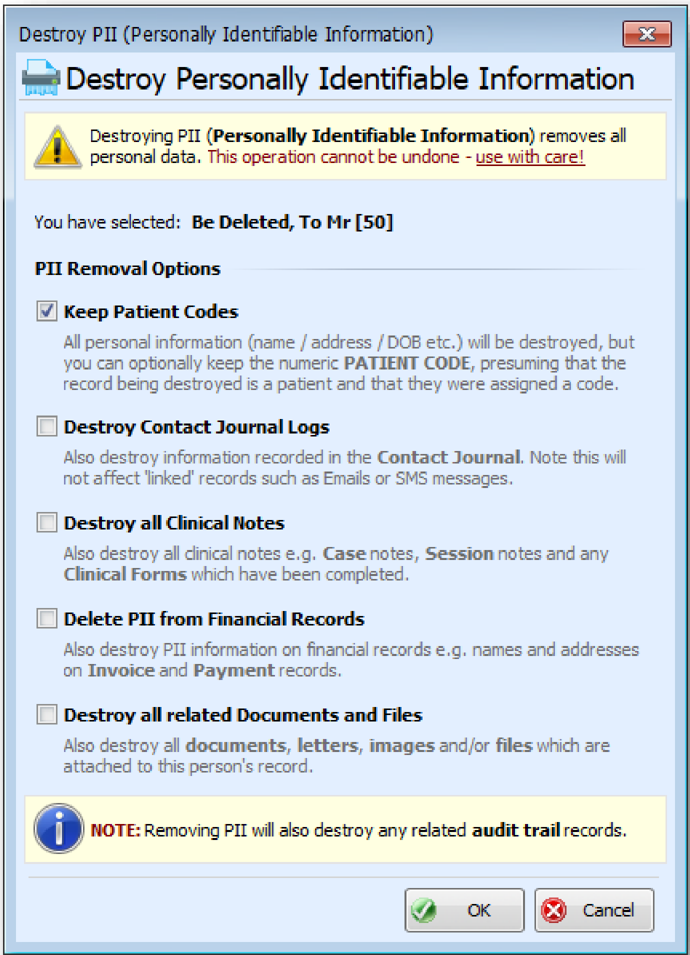
The body that governs your particular profession will likely have guidelines of how long you have to keep data. For some, this might be 7 years after a person has finished their last treatment or after they have sadly passed away. Other professions will be different. After the end of this period, some feel that they no longer have a valid reason to retain this information. This is where our “Destroy PII” (destroy personally identifiable information) feature comes into play, as it offers a way to remove all references to that individual, meaning in NO WAY can they be identified from what remains within ClinicOffice.

In this section, we will consider two examples of how to use the “Destroy PII” feature. The first example will look at how to destroy PII on for a single individual. The second example will consider how to do this on a group of records that have no longer been seen for a period of time.

WARNING! Before you proceed with either example, please make sure that you have the correct records selected before destroying their PII as this CANNOT be reversed.

Example 1

1) Go to the Patients or Contacts grid
2) Locate or search the individual you wish to remove the personal identifiable information for and open their record
3) Click the **Delete** button and click Yes to the next message
4) Click the **Recycle Bin** button (located on the Home menu)
5) Locate the record you have just deleted and open it again
6) Click the **Destroy PII** button (the window to the right will appear)



You will note that there are 5 different options you can select when running the Destroy PII. It is down to you to assess what is required in order to comply with the “Right to erasure”. Each option explains what it does on the screen. If you tick all 5 options, then not only will the identifiable information on the individual record be removed but also all other linked records to that person has will also be wiped as well.

7) Click **OK** at the bottom of this screen
8) Type **YES** if you are certain you want to proceed and click **OK**

The personal identifiable information for this individual will now be wiped and destroyed.

Example 2

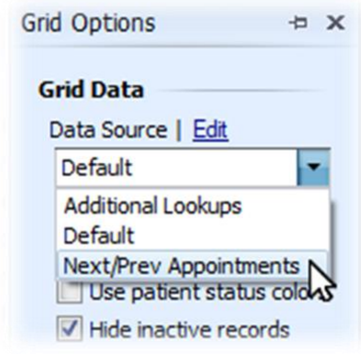
1) Go to the Patients grid by clicking the **Patients** button

2) Click on the **Grid Options** button (towards top right of the grid)

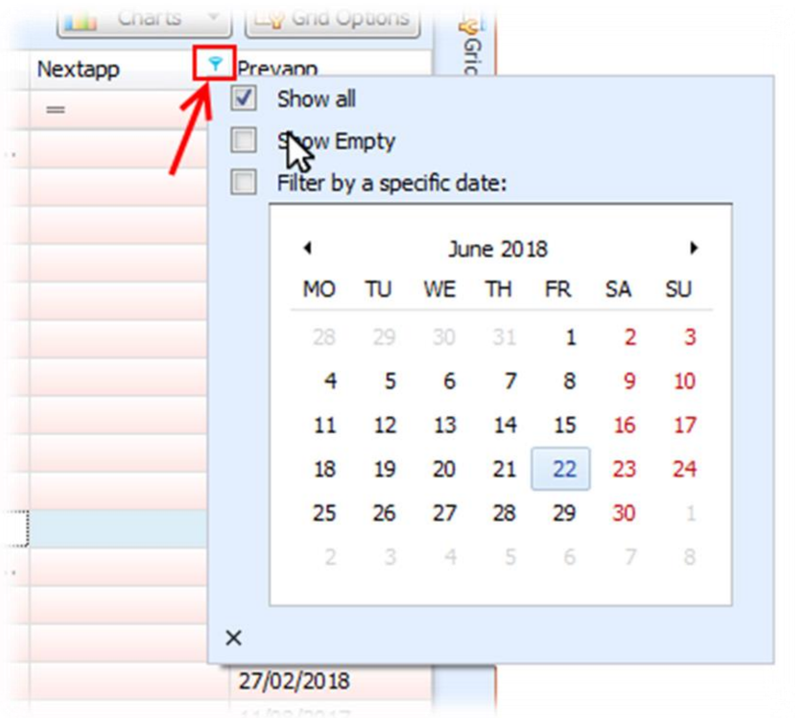
3) Select “**Next/Prev Appointments**” from the drop down menu below the Data Source text at the top of the panel (see example on right)

4) A little further down on the Grid Options panel, click the blue link that says **Toggle Grid Filtering**

5) Scroll to the far right-hand side of the patient grid until you can see the **Nextapp** and **Prevapp** columns



6) Hover your mouse over the **Nextapp** column header until there is a small arrow that appears and click on this arrow (see example below)



7) Tick the option **Show Empty**

8) Now click on the **Search** button

9) Locate the **Prevapp** field (located under Other Search Fields by default) and search for “**On or before**” a date from 7 years ago for example (adjust this to whatever you are required to)

10) Click **OK** and **OK** again

11) Make note of the number of records present by scrolling to the far left hand side and in the bottom left will be a count present there

12) Select all records, by left-clicking on one record, pressing **CTRL** and **A** together

13) Right-click on one of the highlighted records and select **Delete Patient**

14) Click on the **Recycle Bin** button (in the **Home** menu)

15) On the Recycle Bin grid, click the **Search** button

16) Search on the **Deletedon** field of when you deleted the record i.e. Today (also specify a time to narrow the search range) and click **OK**

17) Select all records, by left-clicking on one record, pressing **CTRL** and **A** together

18) Right-click on one of the highlighted records and select **Destroy PII**

19) Make sure that the record selected count, match what you had registered on the patient screen

20) Select carefully the PII Removal Options and click **OK**

21) Type in **YES** and click **OK**

Note: *Information such as general dates (except for the date of birth), invoiced or payment amounts will not be removed when you destroy a person’s PII. The reason is that this information is not deemed personally identifiable information. The only information that could possibly be linked back to the individual is removed.*

Merging Records

You may find that you have more than one record for a patient or contact. This can occur when someone else enters a new record for the same person. This can also easily happen with an appointment type; you can have two different descriptions applying to the same appointment type. This can cause confusion and complications.

The merging contacts or patients work in a similar way to merging Types and Categories, but there are slight differences. These will be discussed in turn.

Merging Patient/Contact Records

To merge a patient or contact record the same process is involved. You can only merge two records at a time.

To do this, follow the instructions below:-

- Go to the Patient/Contact grid
- Right-click on the record you wish to merge
- Select **Merge Records.** A search box will appear.
- Enter the name of the record you wish to merge, then select it
- Press **OK**
- A message will appear, select the record you wish to keep as the original
- Another message will appear informing you that the merge was successful, press **OK**

You will find that the record that you choose to keep will remain, but the other record will be deleted. Any appointments, financial records, documents or Clinical Notes will be transferred over. Details that are entered into the standard fields of the Patient Editor, such as medical information, are not transferred over.

You can also merge two records by selecting both of them in the grid, right-clicking on one of them and then select **Merge Records**. The message will appear asking you which one to keep. Select it and then press **OK** to the following message. This is a slightly quicker way of doing it.

Merging Types & Categories

To merge in the Types and Categories is an identical process, with just a slight difference. Please follow the instructions below:-

- Go to the Types and Categories
- Select which type of category you wish to edit (i.e. Appointment Type, Contact Category)
- Within the grid choose field name (i.e. Reassessment in the Appointment Type) and right-click
- Go to **Merge with…**, select the other field you wish to merge with from the menu
- A message will appear, select the field that you wish to keep
- You will be informed that it was successful, press **OK**

All references to the field within Clinic Office will now be changed to the field that has been kept. An example is if you merge the appointment type Foot Massage with Treatment and you decided to keep Treatment, all references to Foot Massage will be changed to Treatment.

Note: *Once a merge has been successfully completed it CANNOT be undone.*

Recycle Bin

ClinicOffice has its own Recycle Bin. All patient, contact and staff member records, when deleted end up here.

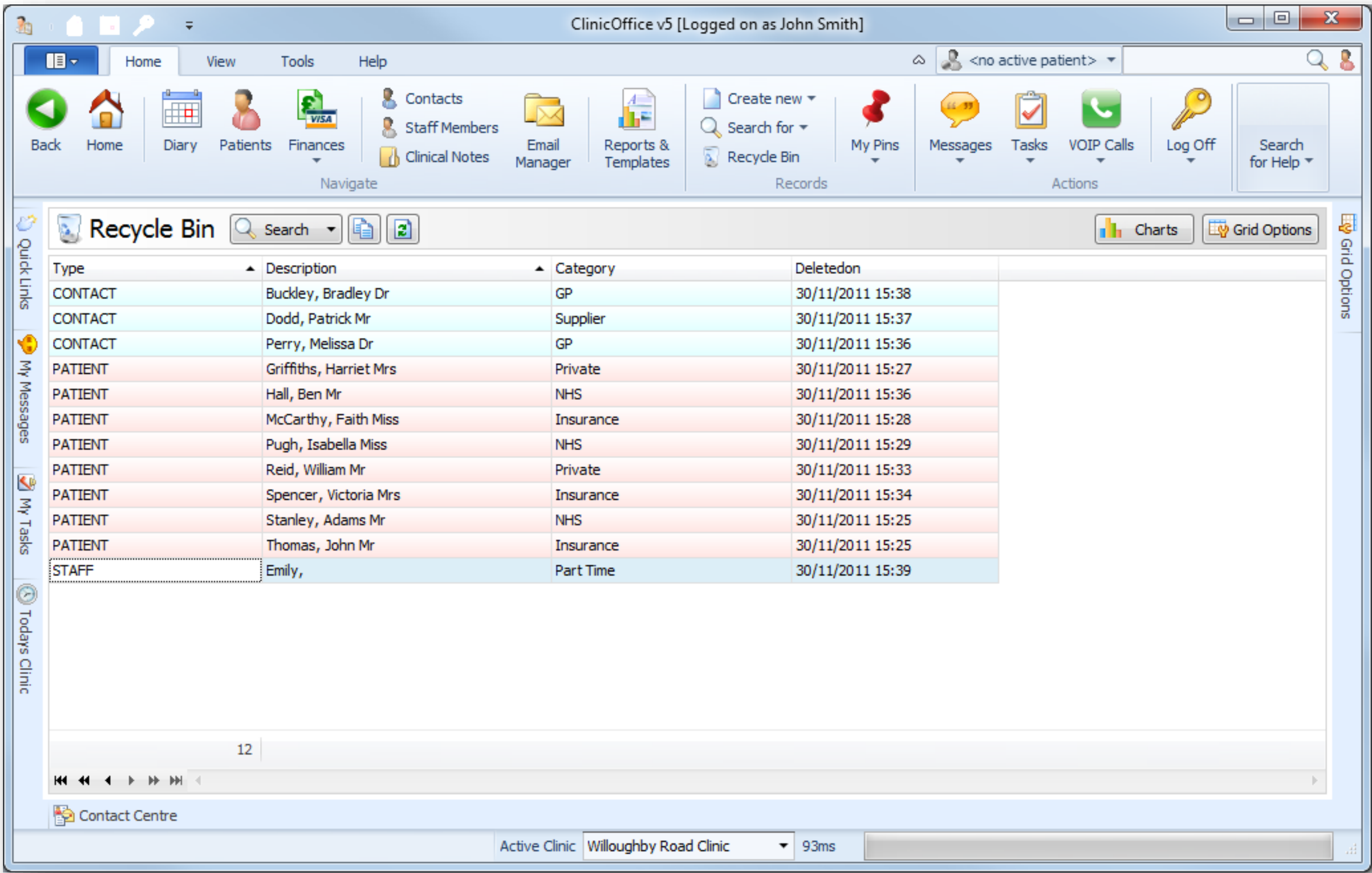
These records can never be deleted permanently. The advantage of this is that if you were to do a financial summary report for the year, those deleted records will be taken into consideration. If a Patient/Contact record was to be removed completely, then this could mean an incorrect financial report being generated. This also stops anyone accidently deleting someone's record permanently.

To access the Recycle Bin, go to the **Home** menu on the ribbon bar and click the **RECYCLE BIN** button.

Recycle Bin Button

The following grid will be displayed:-

ClinicOffice Recycle Bin Grid



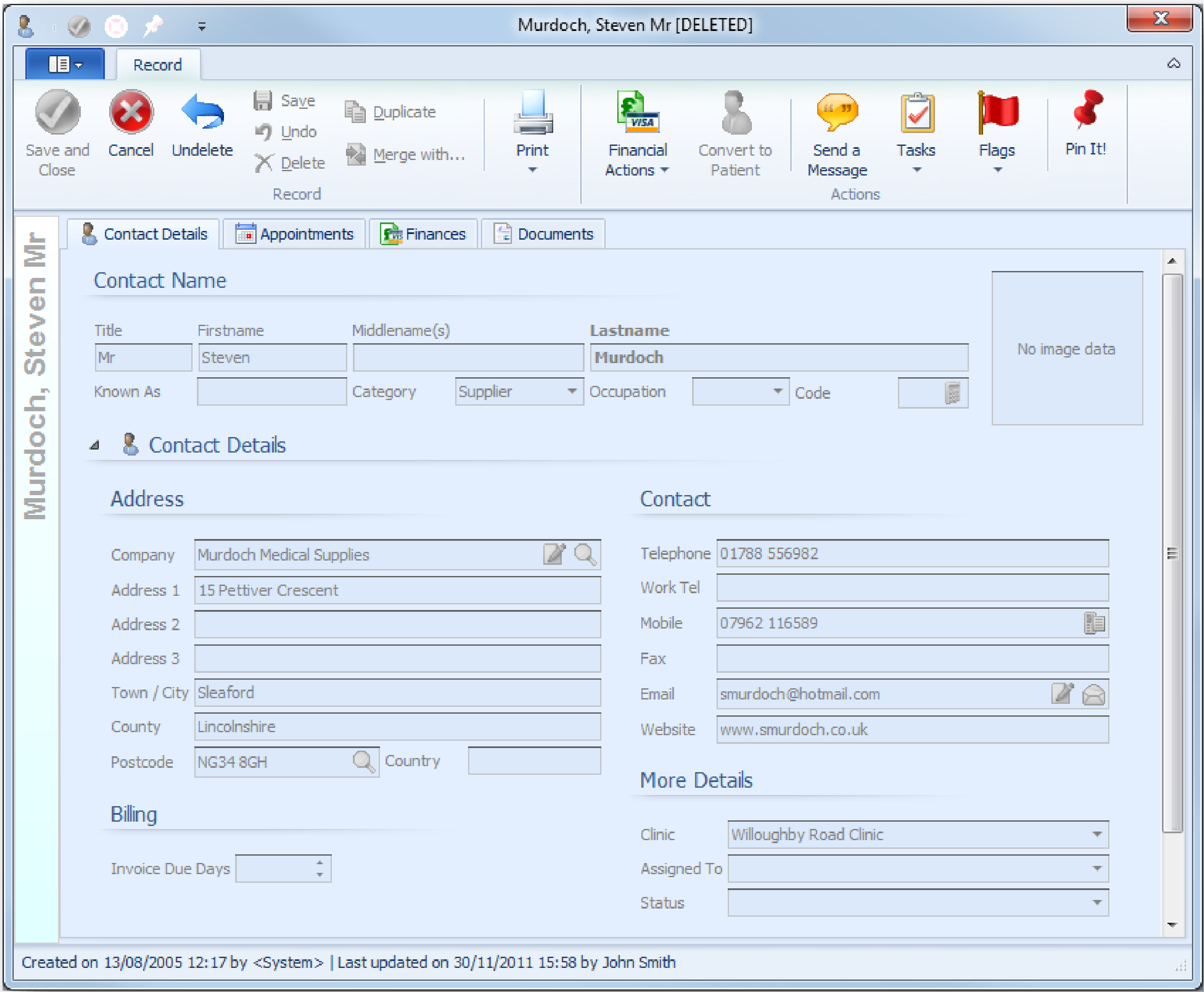
This grid acts like any other grid in ClinicOffice. If you double-click on a record, an editor will open. You will notice that it would say **[DELETED]** next to the record name. You will also notice that the editor is greyed out, meaning that you cannot alter any details while the record remains deleted. The only exception is the Patient/Contact records, where the Finances section is usable. This is so that any financial report generated in the future will be accurate.

Q. Due to GDPR I want to be able to destroy a person's information, but how can I do this if I can never permanently remove a person's record?

A. You can remove a person's identifiable information by using the "Destroy PII" feature via the right-click menu. For more information on how this works, please see the section "Destroy Personally Identifiable Information".

Restoring a Deleted Record

Deleted Contact Record



To restore a deleted record, open it up and click the **Undelete** button located at the top of editor on the ribbon bar (like the image above). Alternatively, you can right-click on the record in the Recycle Bin grid and select **Undelete Record**. This then removes that record from the Recycle Bin and moves it back to its original place (i.e. if it was a patient record it will move to the patient grid).

***Note**: Any financial or appointment records that are deleted will NOT go to the recycle bin. Instead they are deleted permanently and hence cannot be retrieved once deleted.*

Zoom Integration Guide

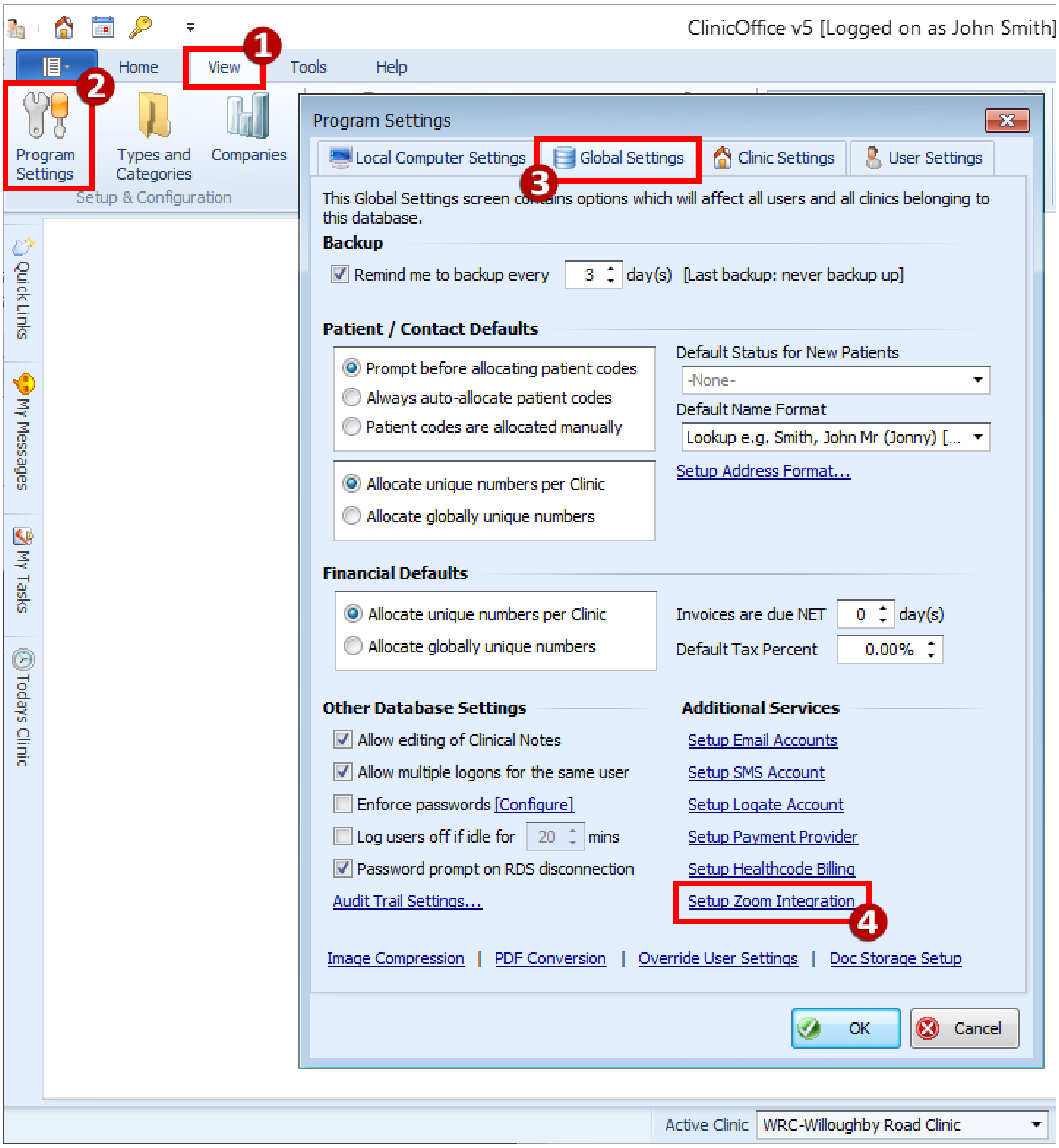
Prerequisites

Zoom integration is offered as a standard feature of ClinicOffice, so there are no additional modules or add-ons that need to be purchased.

However, Zoom requires you to have a paid-for account for third party applications (like ClinicOffice) to integrate via their API. For more information, please see their price plans here:
https://zoom.us/pricing

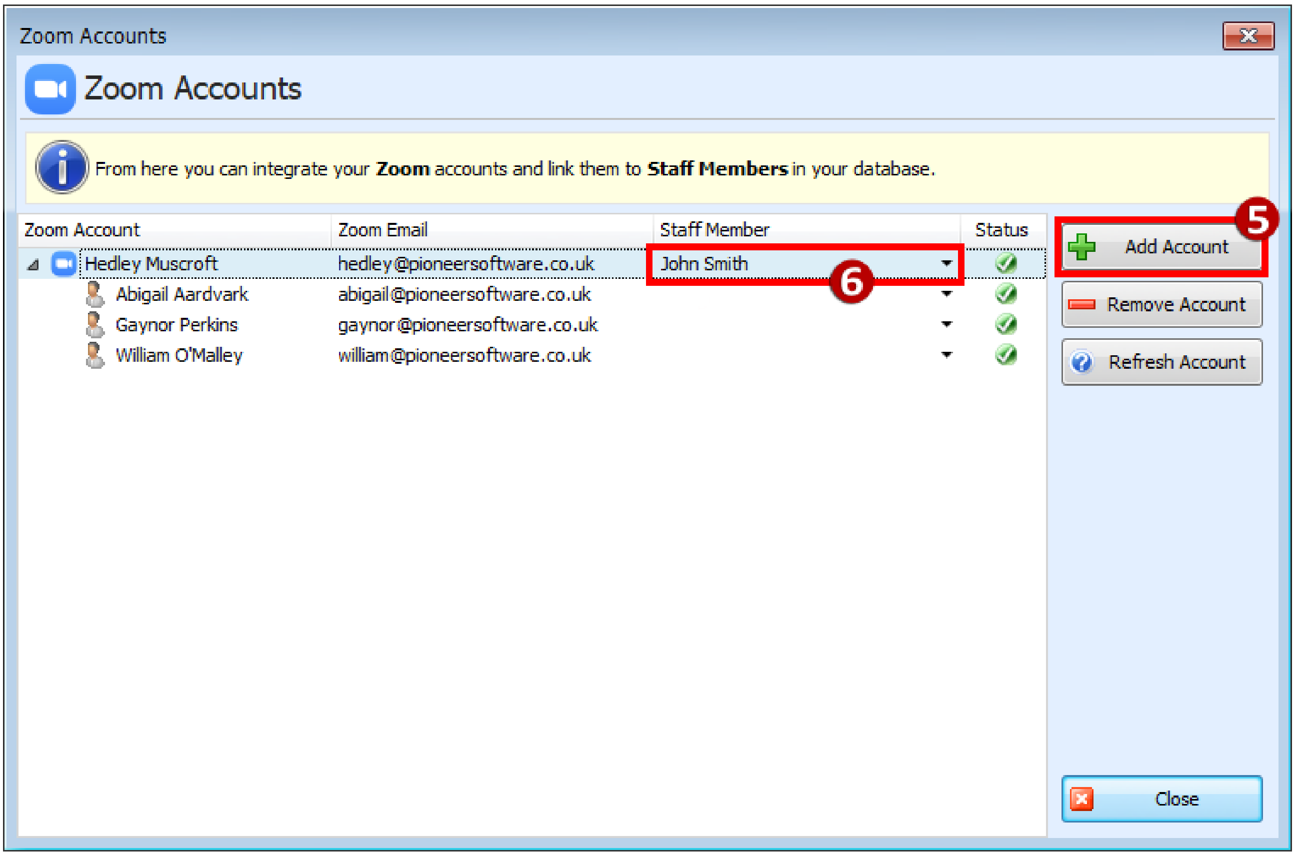
Step 1 – Configuring Zoom Integration

Click [1] **View** -> [2] **Program Settings** -> [3] **Global Settings** -> [4] **Setup Zoom Integration** (as shown below).



Click the **Add Account** [5] button and then login to your Zoom account. You will also need to agree to any prompts allowing ClinicOffice to access your Zoom account.

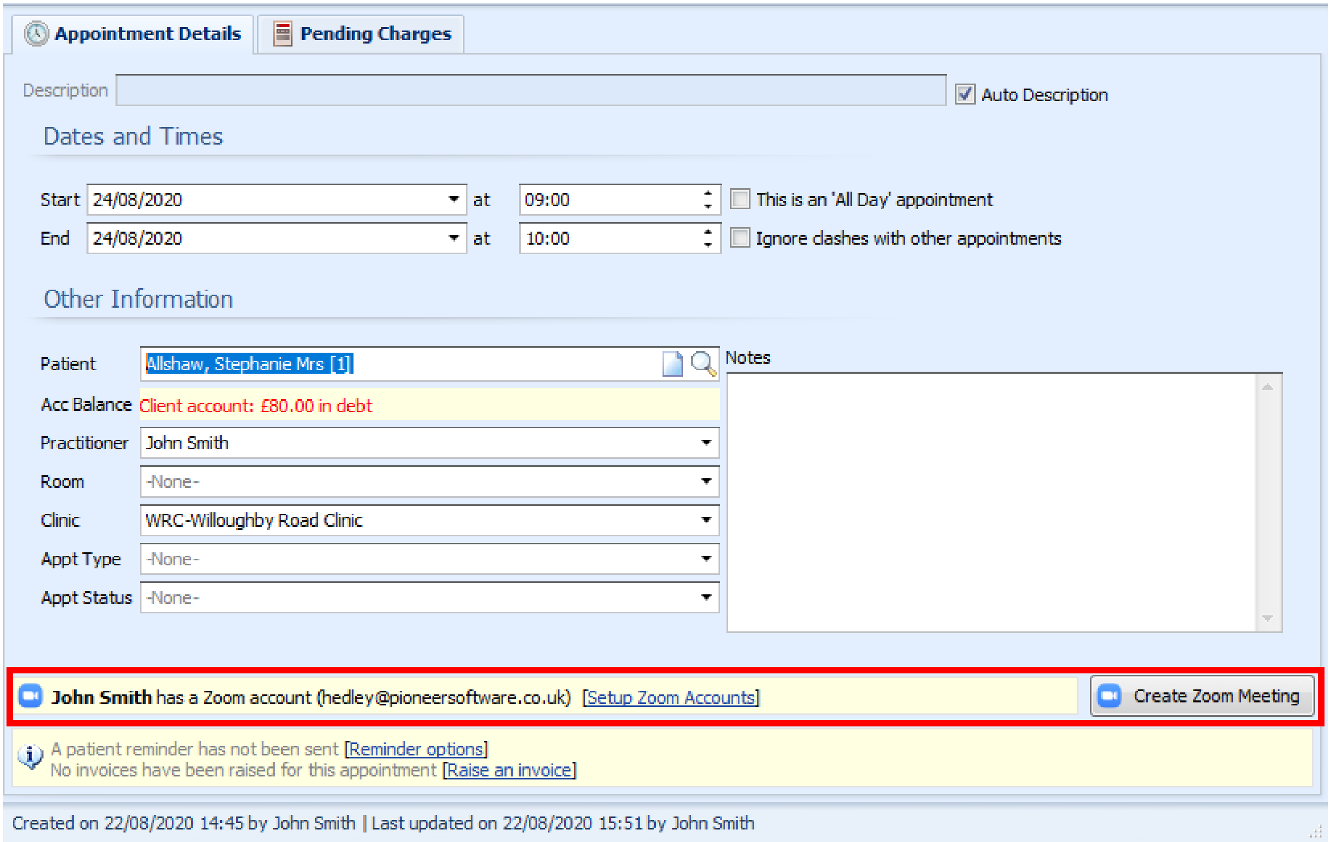
Once your account has been added, map the account to a **Staff Member** in your ClinicOffice database as shown below [6]. If you have any sub-users in your Zoom account, these too can be mapped to Staff Members.



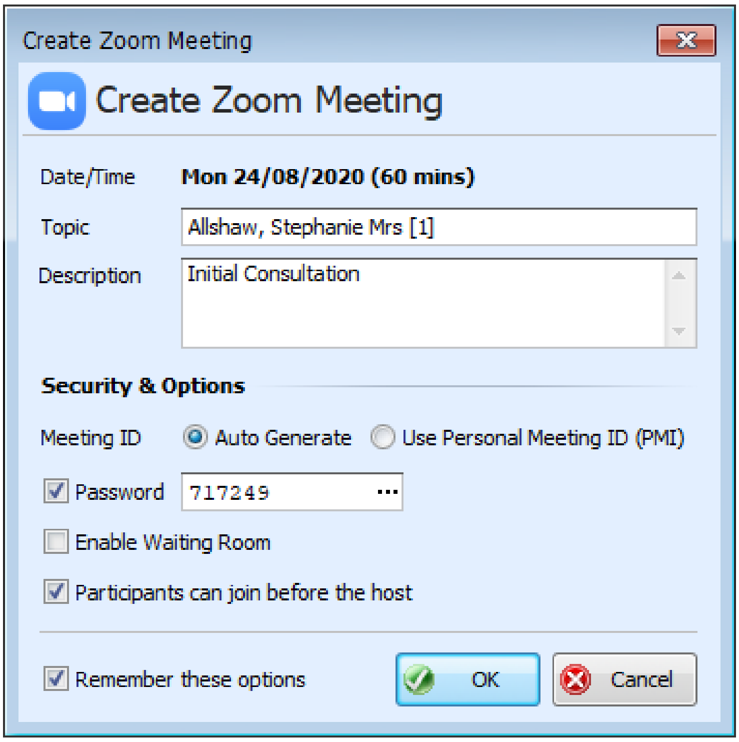
Once you have finished adding your Zoom account(s) to ClinicOffice click the **Close** button.

Step 2 – Creating Zoom Meetings

Now that you have a Staff Member linked to a Zoom account, whenever you create an appointment in the diary for that Staff Member, you will see the option (at the bottom of the screen) of **Create Zoom Meeting**.



Click **Create Zoom Meeting** to create a new Zoom meeting in your Zoom account and link this appointment to it. This will invoke the screen shown below. Set any options you require for the Zoom meeting and click **OK** to create it.

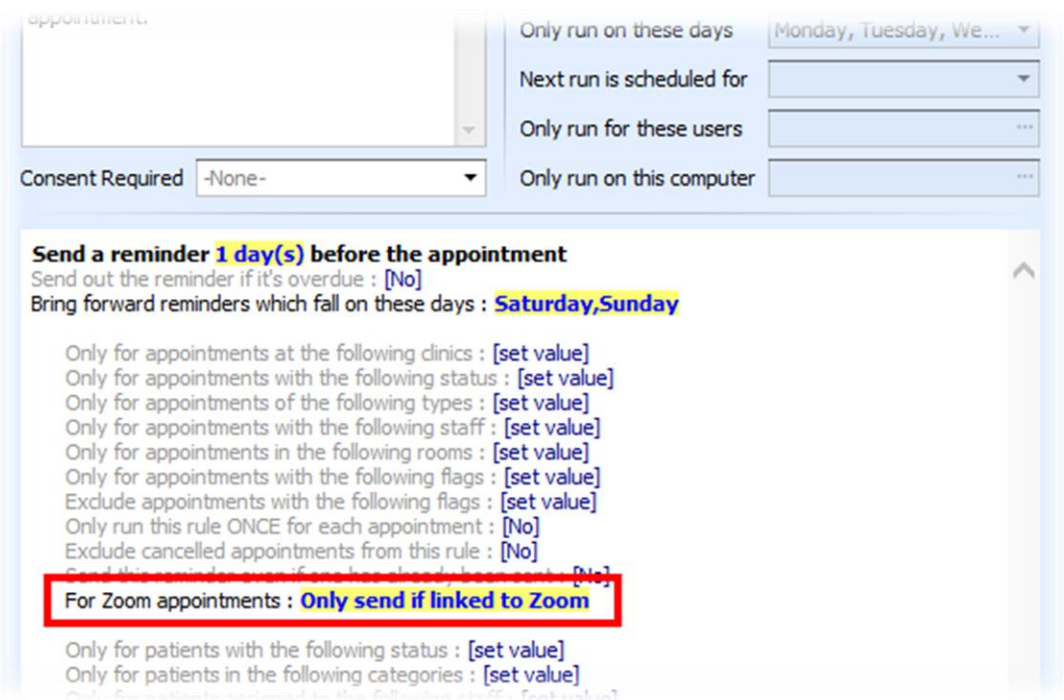


Step 3 – Appointment Reminders for Zoom Meetings

The **Patient Contact Centre** in ClinicOffice allows you to configure rules for sending out Appointment Reminders. (You can find the **Patient Contact Centre** under the main **Patients** button in the ribbon bar.)

When you create an Appointment-based rule there is a setting called *"For Zoom appointments"* (shown below).

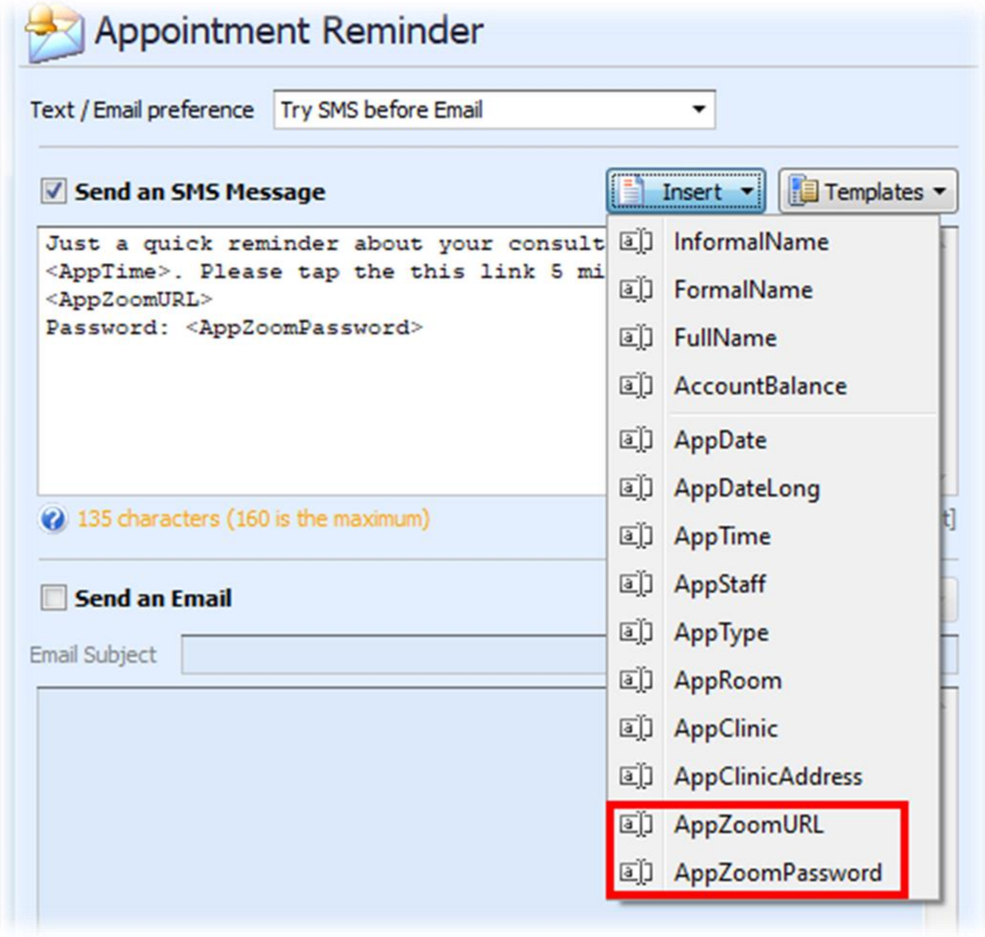
This gives you the option to make the rule ONLY apply to appointments which are ***linked to Zoom*** or appointments which are ***NOT linked to Zoom***.



When configuring the reminder itself, there are two Zoom-related merge fields that can be inserted into the message text:

AppZoomURL This embeds the URL (webpage link) for the recipient to tap on to join the meeting

AppZoomPassword This embeds the password (if there is one) that they will require to join the meeting



For more information on creating and configuring Appointment Reminders and other automated rules, please refer to the section "Patient Contact Centre".

Uninstalling/Removing Zoom Integration from ClinicOffice

If you no longer wish to use Zoom with ClinicOffice, simply remove all the accounts from the Zoom Accounts screen, as follows:

- Click **View** -> **Program Settings** -> **Global Settings** -> **Setup Zoom Integration**
- For each Zoom account, click the REMOVE ACCOUNT button

As a second step you can remove the integration from your Zoom account as follows:

- Login to your Zoom Account and navigate to the **Zoom App Marketplace**
- Click **Manage -> Installed Apps** or search for the "ClinicOffice" app
- Click the "ClinicOffice" app
- Click **Uninstall**

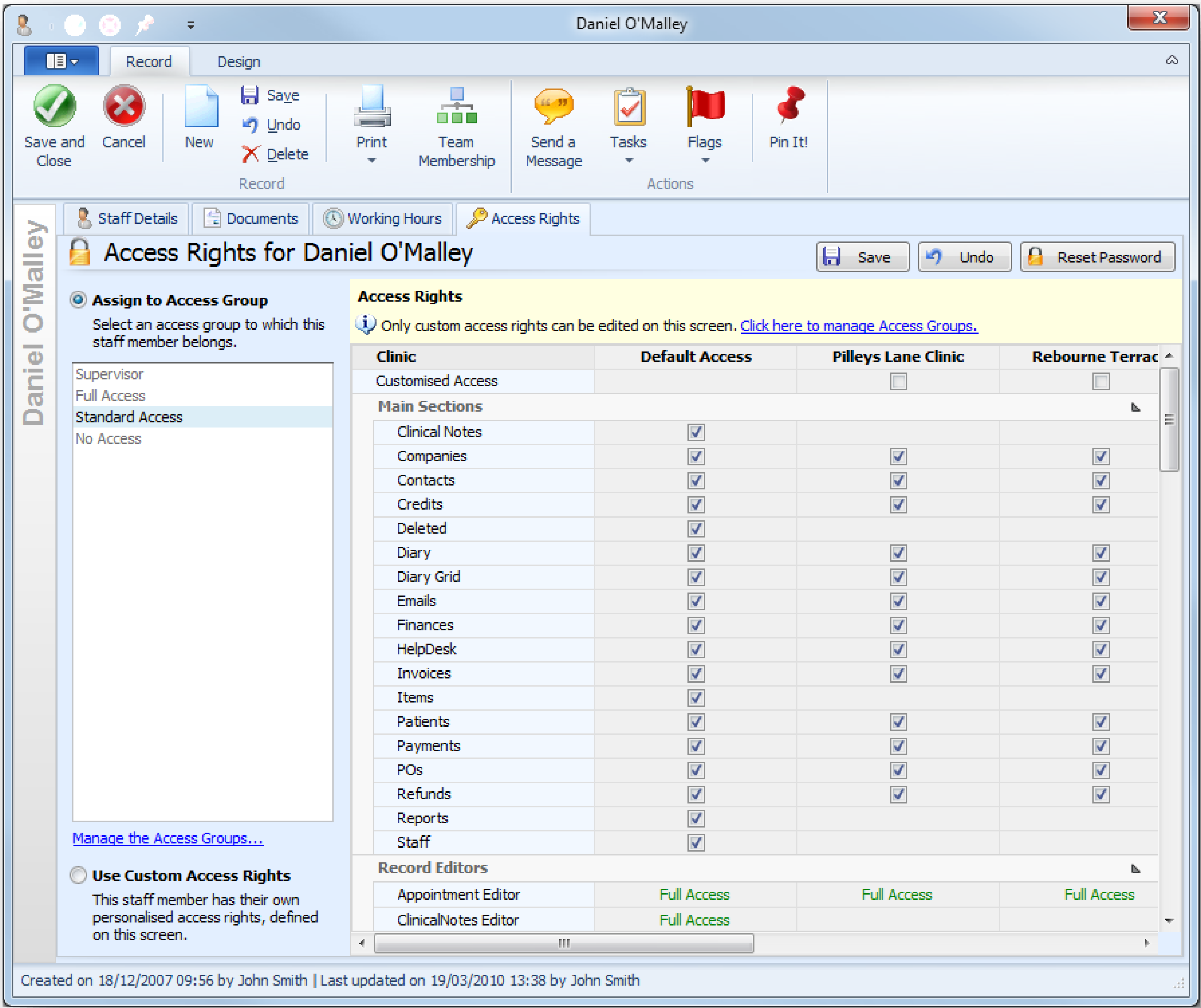
The above steps will remove all Zoom integration from ClinicOffice.

Staff Member Access Rights

With ClinicOffice v5 you can set each staff member up so that they have certain access rights. This is an important feature, because you might not want certain members of staff to have access to certain records that you store on the database (i.e. financial records).

To set the Access Rights of a staff member, go to the Staff Members grid. Double-click on the staff member you wish to change. Once in the Staff Editor click on the **Access Rights** tab. It should look like the following screen:-

Staff Editor Access Rights



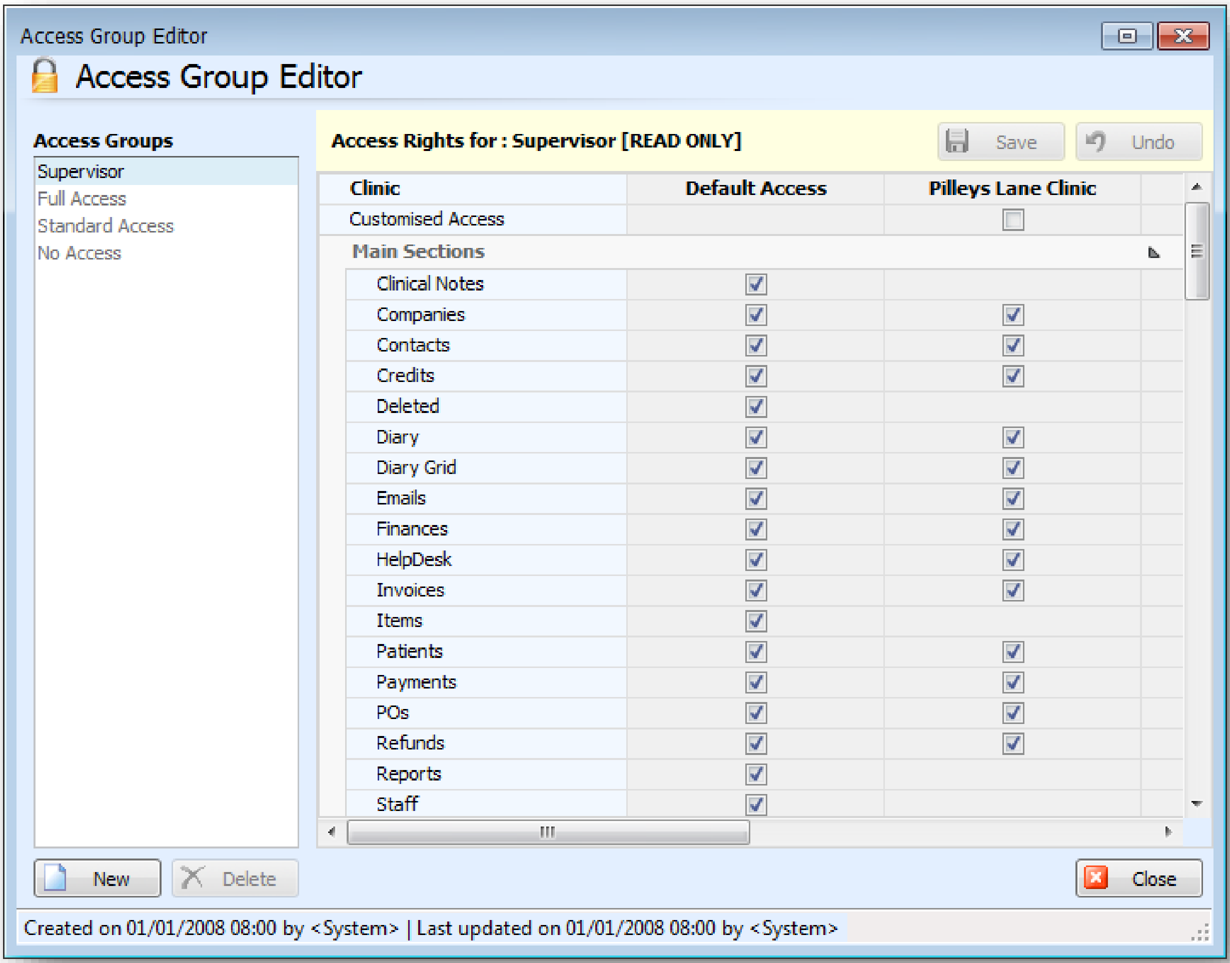
The Access Rights can be broken down into two sections **Assign to Access Group** and **Use Custom Access Rights**.

Assign to Access Group

This area has three default groups: Supervisor, Full Access, and No Access. If you set the staff member to **Supervisor,** they will have full access to all parts of COv5 and will be able to alter other staff member's access rights. If you set the staff member to **Full Access** then they have full access rights, but they 'cannot' alter other staff members access rights. If the staff member is set to **No Access,** then they have no rights on COv5 and will not be able to logon.

You can create or alter an Access Group by clicking on the blue text which says **Manage the Access Groups…**; the Access Group Editor opens.

Access Group Editor



To create a new Access Group, press the **NEW** button. To remove a group, press the **DELETE** button. To rename a group right-click on it, in the Access Groups list and select **Rename**. To make a copy of an Access Group right click on the group and select **Copy**. You cannot edit or change any of the original three Access Groups. To edit one of your own Access Groups, see the next part on "Use Custom Access Rights". Press the **SAVE** button to save any changes made.

Use Custom Access Rights

This section is used if you want to edit a staff member's access rights, but you wish to define a unique set of rules. This works in the same manner as the Access Group Editor.

You have four parts: **Main Sections**, **Record Editors**, **Other Options** and **Reports**. The **Main Sections** are whole parts of ClinicOffice for example the **Patients** grid. If this was un-ticked the staff member could not view the Patient Grid but could still view the Patient record by other means.

The **Record Editors** covers all editors in COv5. Rather than being tick boxes (like the Main Sections), you have four choices: Full Access, Full (No Delete), Read Only and No Access. So, if you set **Patient Editor** to **No Access** the staff member could view the Patient Grid but would not be able to look at the Patient Editor. So, if you combine the two sections, by un-ticking the **Patients** (Main Sections) and set the **Patient Editor** to **No Access,** then the staff member could not view the Patient Grid or Editor.

The **Other Options** are all the additional areas of ClinicOffice v5 that are not classified as a **Main Section** or **Record Editor**. This area is particularly useful if you wish a staff member to have access to a certain area of ClinicOffice, but you wish to restrict the functions that they can carry out. An example is if you wish to allow the member of staff to have access to all grids (i.e. patient) but not to be able to export the data to something like an Excel spreadsheet. To do this un-tick the box next to **Export Grids** (located under Other Options).

The **Reports** section rounds off the Access rights nicely. This area is helpful if you wish for a member of staff to have access to a report such as a 'Letter to a Patient', but not to the financial reports. The other sections have rules on the access rights for reports, but they affect all reports. This section though allows you to specify which report they may or may not have access to. Simply un-tick the box next to the report you do not wish them to use.

You also have the Default Access column and the clinic's column. By default, the clinic's column will appear in yellow. This means that any changes made in the Default Access column will also affect the clinic's column. The advantage is that if you have several clinic columns (all in yellow), you can set a general rule for all clinics. To remove the yellow shade, simply tick the **Customised Access** box (located below each clinic name). Once removed any changes made in the Default Access column will no longer affect the clinic's column.

The following example will show you how to customise a staff member's Access Rights:-

- Go to the Staff Grid
- Double-click on the staff member you wish to edit.
- Click the Access Rights tab.
- Select the **Use Custom Access Rights** (located towards the bottom left hand corner).

We need to set the staff member's access rights so that they cannot create/view any financial information. To do this read on:-

- Under the Default Access column in the top half (Main Sections) un-tick: Credits, Finances, Invoices, Items, Payments, POs and Refunds
- Again under the Default Access column but this time the lower half (Record Editors) set the Charge, Credit, Invoice, Item, Payment, PO and Refund Editors to **No Access**
- Further down in the Default Access under Other Options column un-tick the Quick Transactions and Stock Control
- Also un-tick all financial reports (under the Reports section)

You will notice that the clinic's column has also changed (so long as Use Customised Access box was un-ticked). Now the member of staff will not be able to access any financial records. Their Access Rights should look something like the following:-

Modified Access Rights Main Sections

Clinic	Default Access	Pilleys Lane Clinic
Customised Access		☐
Main Sections		
Clinical Notes	☑	
Companies	☑	☑
Contacts	☑	☑
Credits	☐	☐
Deleted	☑	
Diary	☑	☑
Diary Grid	☑	☑
Emails	☑	☑
Finances	☑	☑
HelpDesk	☐	☐
Invoices	☐	☐
Items	☑	
Patients	☑	☑
Payments	☐	☐
POs	☐	☐
Refunds	☐	☐
Reports	☑	
Staff	☑	

Modified Access Rights Record Editors

Record Editors		
ActLog Editor	Full Access	Full Access
Appointment Editor	Full Access	Full Access
AuxPer Editor	Full Access	Full Access
Charge Editor	No Access	No Access
ClinicalNotes Editor	Full Access	
Company Editor	Full Access	Full Access
Contact Editor	Full Access	Full Access
Credit Editor	No Access	No Access
Invoice Editor	No Access	No Access
Item Editor	No Access	
Patient Editor	Full Access	Full Access
Payment Editor	No Access	No Access
PO Editor	No Access	No Access
Refund Editor	No Access	No Access
Staff Editor	Full Access	
Task Editor	Full Access	Full Access
Ticket Editor	Full Access	Full Access

Modified Access Rights Other Options and Reports

Other Options	
Assign Online Passwords	☑
Assign Practitioners to Appt Ty	☑
Assign Team Membership	☑
Batch Editing	☑
Can Hide Optional Messages	☑
Change Own Password	☑
Clinical - Lock Cases	☑
Clinical - Lock Sessions	☑
Clinical - Unlock Cases	☑
Clinical - Unlock Sessions	☑
Clinical Summary	☑
Designing - Editors	☑
Designing - Form Designing	☑
Diary - Drag and Drop	☑
Diary - View Other Staff	☑
Export Grids	☑
Import Data	☑
Password Protect Patients	☑
Quick Transactions	☐
Reports - Create	☑
Reports - Delete	☑
Reports - Edit	☑
Restrict Financial Data	No Restriction
Restrict Practitioner Access	No Restriction
Rules - Create	☑
Rules - Delete	☑
Rules - Edit	☑
Rules - Run	☑
Send Emails	☑
Send Text Messages	☑
Settings - Clinic	☑
Settings - Global	☑
Settings - User	☑
Staff Working Hours	☑
Stock Control	☐
Types and Categories	☑
View Contact Documents	☑
View Patient Documents	☑

Reports (Appointment)	
Appointment Confirmation Slip	☑
Appointment List	☑
Reports (Financial)	
1 Synergy Invoice to AXA (Det	☐
Account Balances (All)	☐
Account Balances (Open)	☐
Credit Note	☐
Customer Statement	☐
Invoice	☐
Invoice to Insurance Company	☐
Invoice to Insurance Company	☐
Invoiced Items & Services (Sur	☐
Invoiced Items & Services by F	☐
Invoiced Items & Services by S	☐
Invoiced Items & Services by S	☐
Invoices List	☐
Outstanding Invoices	☐
Outstanding Invoices (Ageing	☐
Payment List	☐
Payment Receipt	☐
Payment Receipt (Detailed)	☐
Payment to Staff Allocation	☐
Payments for Items & Services	☐
Payments for Items & Services	☐
Payments for Items & Services	☐
Purchase Order	☐
Statement of Invoices	☐
Statement of Invoices (Detaile	☐
Statement of Outstanding Inv	☐
Statement of Outstanding Inv	☐
Statement of Receipts	☐
Reports (Letters)	
Appointment Reminder Letter	☑
Letter to Contact	☑
Letter to Patient	☑
Letter to Patients GP	☑
Recall Reminder Letter	☑

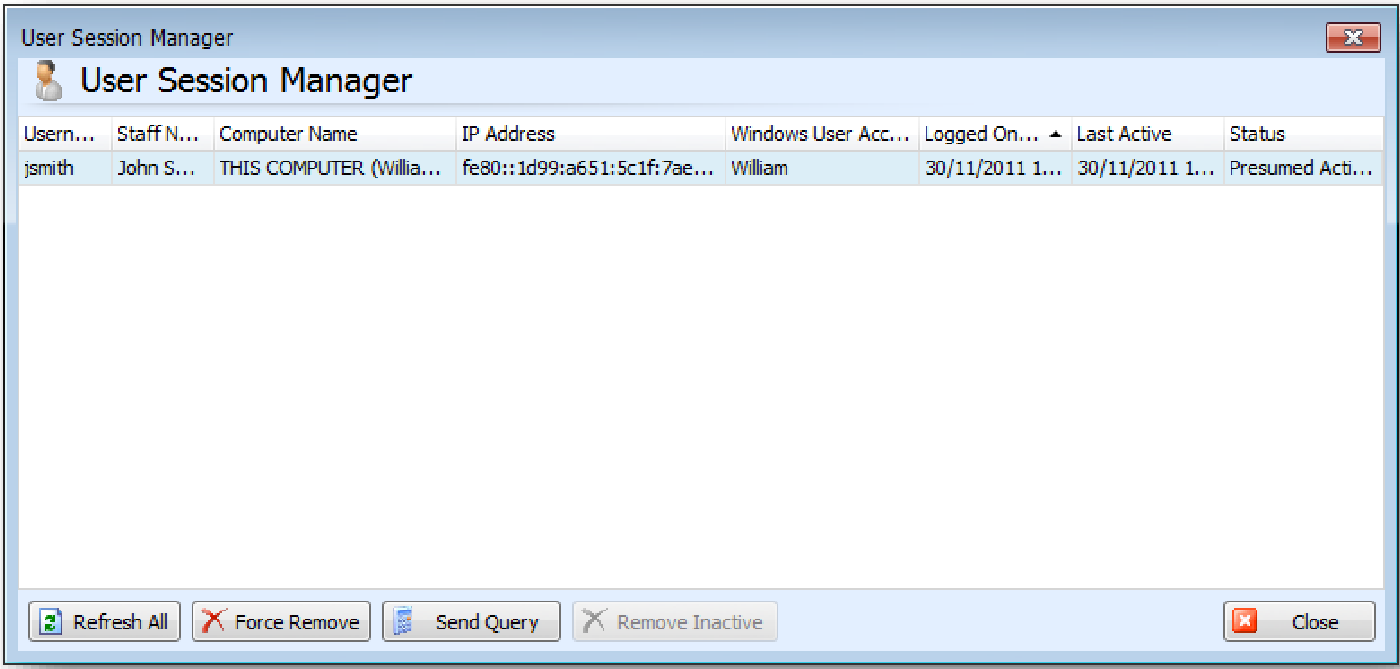
You might have noticed that not all the fields within the access rights have a separate tick box for each clinic. The reason for this is that certain fields are not defined by a single clinic. For example, **Reports** (which is under **Main Sections)** are not categorised by clinics. The reports can draw information from any clinic; hence if the member of staff is not allowed to access information about their own clinic then neither can they access other clinic's information.

Note: *Whenever an additional report is created a new rule is automatically created for it. Make sure that you change the Access Rights for staff members whom you do not wish to access it. Also, any changes made to the Access Rights will not take effect until that member of staff is logged off from ClinicOffice.*

Managing Users Logged In

The User Session Manager allows you to monitor all users accessing the same database. Go to the **Tools** menu and click the **User Session Manager** button.

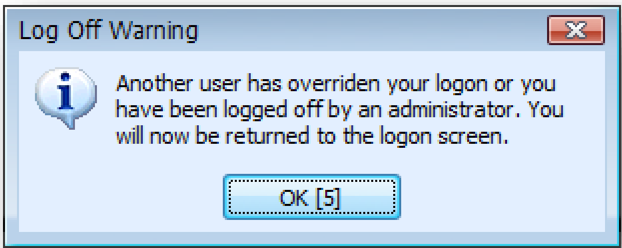
User Session Manager



You will use this screen if you suspect that someone is not actively using ClinicOffice. One scenario could be that one of the users terminated their connection abruptly with ClinicOffice so that it was forcefully closed (i.e. they switched the computer off at the mains). In this case ClinicOffice will still register that user as being logged on. To check if this is the case click the **Send Query** button. ClinicOffice will now check for 60 seconds to see if the user is Inactive. If the user logs back onto ClinicOffice during this time this will be detected and the query will finish. If the user has not logged back on, then the Session Manager will declare them as being inactive. When a user is inactive click the **Remove Inactive** button, this then removes their entry. All users that are logged on will be shown as active; hence the **Remove Inactive** button will not affect them.

Another scenario is if a user is logged onto ClinicOffice and forgot to log off before they left. If this is the case and you know for a certainty that they will not be back, you can forcibly remove them by clicking on the **Force Remove** button. A log off warning message will appear on their screen, like the one below.

Log Off Warning Message



Once the message appears it will run for 10 seconds, after which they will be logged off from ClinicOffice. Only staff members with the access rights of a Supervisor can perform this task.

Note: *that any data that is being entered into an editor, which has not been saved, will be lost when the user is forcefully removed.*

Active Patient

When you start to use ClinicOffice you will notice a field situated in the top right hand corner of the program, just left of the search field. This is the Active Patient field.

Active Patient Field

When you open a patient's record or Clinical notes, that patient will then become the Active Patient. You can also set the active patient by going into the diary, left clicking on an appointment and selecting **Set as Active Patient**. You will notice that the Active Patient Field flashes a golden orange colour when the active patient has changed. What happens next is when you go to create a new appointment, invoice, payment or credit note; you will be asked if you wish to use their name. If you click **Yes** then the Patient's field will be automatically filled by the active patient's name. This is so long as you are not creating it via another record, in which case it would assign that individual's name instead.

The Active Patient field can store up to 10 patients in its history. To select another patient from the history left click on the field and select one of the other patients. You can clear the current active patient by selecting **Clear Active Patient**. Note that this does not clear the list of patients in the history. In order to clear this you need to you log off and log on and then the history will be wiped.

The Active Patient is handy when you want to create multiple appointments for a specific patient. So for example if you wanted to book five appointments for "Joe Bloggs" in the future, then you will set him as your active patient. You will then go to the relevant date and time, create a new appointment and click **Yes** to use the active patient; his name will be automatically filled in. This means you do not need to continuously reinsert his name, because it is automatically done for you.

If you wish to disable the **Active Patient** field you can right click on it and select **Disable this Feature**. By doing this, the field will become grayed out.

Disabled Active Patient Field

When in this state ClinicOffice will stop tracking the patients. To restore the field right click on it and select **Enable this Feature**.

Spellchecking

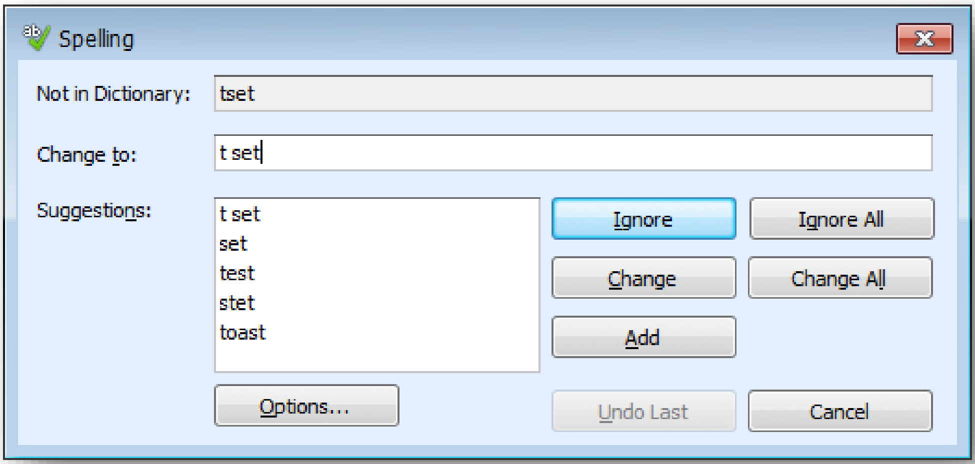
Enabling spell checker

ClinicOffice has an inbuilt spell checker. This can be used on any ***memo*** field present in any of the editors. You can switch on the spell checker by clicking on the **Check Spelling** button (at the top of any editor i.e. session notes) and select "**Check as you type**". Once this option is ticked any memo fields will have their spellings auto checked. You would do this for any editors and once enabled for that editor the setting will be saved for future use when you log in.

When you start typing, any words that are spelt incorrectly or that are not recognised in the built-in dictionary will be highlighted in red. You would correct any misspellings by right-clicking on the text and selecting the correct spelling of the word. If you know for a certainty that the word is correctly spelt but ClinicOffice is incorrectly showing it has having been misspelt, then you can right-click on the word and select **Add to Dictionary**. The word will now be recognised for future use.

Some of the more basic editors, such as the Activity Log Editor, do not have the auto spellchecking feature. You can still perform a spellcheck by right-clicking on the memo field and selecting **Check Spelling**. After selecting the **Check Spelling**, ClinicOffice will find any misspelt words within that memo field. Any words that were not spelt correctly will then be highlighted in a Spelling window (see image below).

Spell Check Window



From this window, you can select the correct word in the **Suggestions** field. If you are purposefully misspelling the word then you can click **Ignore**. If the word is correctly spelt then you can click the **Add** button in order to add the word to the program's dictionary. Whenever you select one of the suggestions, click to ignore or to add to the dictionary, then the spelling window will move to the next word. Once all words have been checked, a message will appear to say that the spelling check is complete.

For a more detailed explanation of the functionality of the above window, please see the table below.

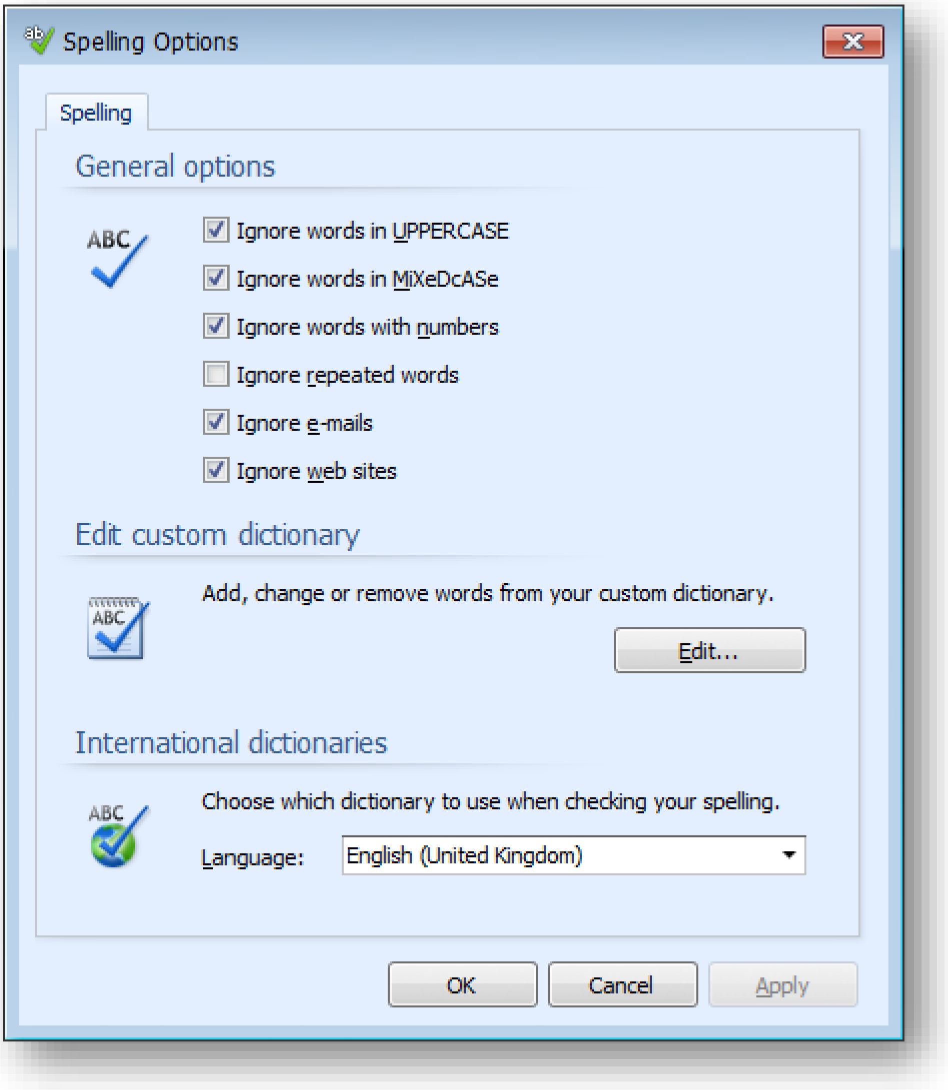
Not in Dictionary	This window shows a preview of the text in the memo field. It highlights in blue the word that is being queried. Once the word has been dealt with i.e. ignored or added to the dictionary then the next incorrect word is highlighted.
Ignore Once	This will ignore the highlighted word. If another misspelt word is entered into the memo field then this word that has been ignored will be brought into question again.
Ignore All	This will ignore the highlighted word permanently. No matter what else happens the word will remain ignored.
Add to Dictionary	This will add the highlighted word into your dictionary.
Suggestions	This provides you with a list of suggestion of what to correct the highlighted word with.
Change	By clicking this button it will change the current highlighted word with the word that you selected under the Suggestions section.
Change All	By clicking this button it will auto correct all words that have the same mistakes with the word selected under the Suggestions section.
Options	This will take you into the Spell Checker Options window
Undo Last	This will undo the last correction made.

The auto-spellchecker is also available in the Email Manager's Email editor window by clicking the button **Check Spelling**. You can enable this feature in the Document Template editor as well by clicking the same button.

Spell Checker Options

You can get into the Spell Checker Options window by either following the method mentioned on the last page or by going to the **View** menu, clicking the **Program Settings** button and then clicking the blue link **Spell Checker Settings**.

Spelling Options Window



The window is split into 3 options:

General Options

Ignore words in UPPERCASE	When ticked any words that are in full uppercase will be ignored when COv5 is running a spell-check.
Ignore words in MiXeDcASe	When ticked any words that are in mixed case will be ignored from the spell-check.
Ignore words with numbers	When ticked any words that include numerical values will be ignored form the spell-check.
Ignore repeated words	Usually if a word is used twice the second word will be highlighted as being incorrect. When this is ticked it will ignore words that are used more than once.
Ignore e-mails	When ticked any email address will be ignored from the spell-checker.
Ignore web sites	When ticked any web site addresses will be ignored from the spell-checker.

Edit Custom Dictionary

If you click the **Edit…** button the Custom Dictionary window will open. You will see that any custom words that you have added to the dictionary will appear on this screen. You can add additional words from here and remove previously added ones.

International Dictionaries

This is where you can select different languages for the spell checker. By default ClinicOffice includes English (United Kingdom), English (Ireland) and Dutch (Netherlands).

Adding New Dictionary Languages

You can also add additional dictionaries to ClinicOffice, by going to the **Program Settings** and located under **Local Computer Settings** is a link **Manage Installed Dictionaries**. You will note that when in this window you have the option to tick additional languages. So for example, if you needed the Spanish (Spain) dictionary installed, you would tick **es_ES**. When you click **OK** this dictionary will be downloaded. When you go back into the **Spell Checker Settings** you will be able to select “Spanish (Spain)” in the Language field.

Diary Synchronisation

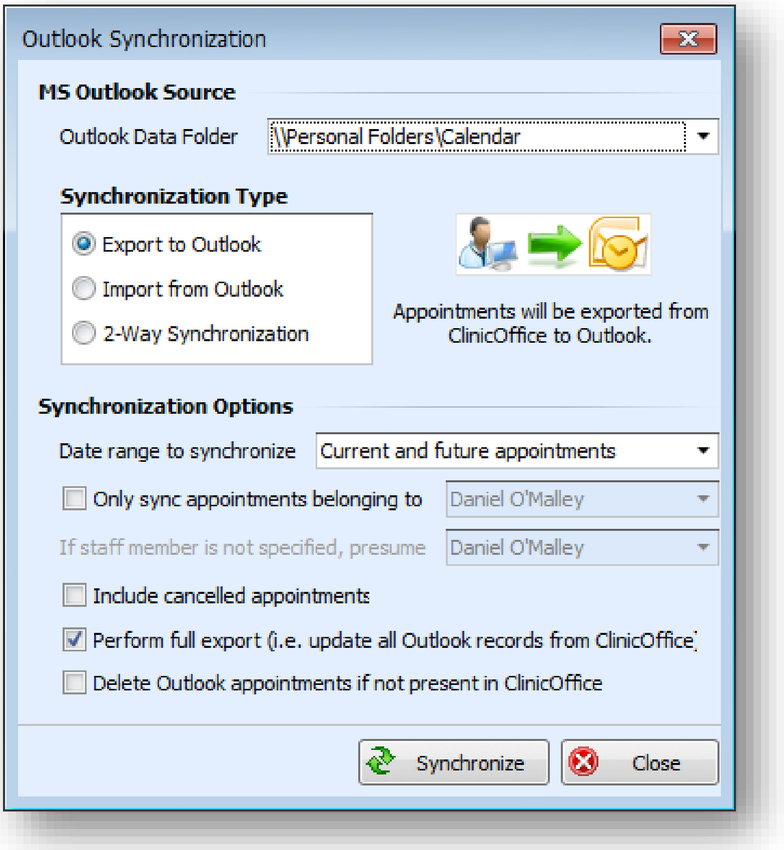
With the Diary Synchronisation module you can synchronise your appointments between ClinicOffice and Microsoft Outlook or Google Calendar. This is very handy because you can take your diary from ClinicOffice and transfer it to any device which can handle Outlook or synchronize with Outlook. Alternatively has internet access in order to synchronise with Google Calendar.

Outlook Synchronisation

To synchronize with Microsoft Outlook, follow the steps below:

- Right-click anywhere in the main ClinicOffice Diary
- Select **Sync Calendar** then select **Sync with MS Outlook**
- The following window will appear:

Outlook Synchronization window



- Under Outlook Data Folder field you can choose the calendar you wish to Synchronize with
- Now select one of the Synchronization Types

Export to Outlook

This option exports all appointments from ClinicOffice into Outlook. The Synchronization Options for this are as follows:

Data range to Synchronize

You can choose to synchronize for: Current and future appointments, from the start of this month, from the start of this year and from 12 months ago onwards. Please remember the larger the data range the longer it will take to synchronize.

Only sync appointments belonging to

By selecting this you can specify which practitioner's appointments you wish to export. If you do not then all practitioners' appointments will be exported.

Include cancelled appointments

By default ClinicOffice will not export cancelled appointments. If this is ticked then appointments that have been cancelled will be exported as well.

Perform full export

You may have the same appointments in ClinicOffice and Outlook but in different locations. When you have this option ticked it will forcibly move those appointments in Outlook to match ClinicOffice. Also any differences in the Subject or Location will also be changed according to the ClinicOffice appointments. When not selected only new appointments will be exported over and no other changes will be made.

Delete Outlook appointments if not present in ClinicOffice

If this option is ticked, then when you go to export to Outlook it will delete any appointments that are not present in ClinicOffice. This is only suggested if you are sure you do not need any of the appointments present in Outlook that are not present in ClinicOffice v5.

Import from Outlook

This option imports all appointments from ClinicOffice into Outlook. The Synchronization Options are very similar to that of the Export to Outlook. The differences are listed below:

Only sync appointments belonging to

By selecting this you can specify which practitioner's diary you wish to import the appointments for. If you do not have this option ticked, then you will notice that the field below comes into play. This option is **If staff member is not specified, presume**, so ClinicOffice will assign the new imported appointments to a practitioner. You can select the default practitioner if you wish.

Include cancelled appointments

By default, ClinicOffice will not import cancelled appointments. If this is ticked, then appointments that have the cancelled status will be imported as well.

Perform full import

You may have the same appointments in ClinicOffice and Outlook but in different locations. When you have this option ticked it will forcibly move those appointments in ClinicOffice to match Outlook. Also, any differences in the Subject or Location will be changed according to the Outlook appointments.

2-Way Synchronization

This option is an export and an import combined. This means appointments in Outlook and ClinicOffice will be transferred to each other. So, any differences will be noted in both programs and added accordingly to both diaries.

As a rule of thumb, we would recommend that you use this option instead of doing the other two separately. The reason is that it saves you time and you know that both diaries match each other, giving you peace of mind. The only unique option for the 2-way synchronization is:

For 2-way synchronization, give priority to

You may find that the ClinicOffice appointments might be in different locations to that of Outlook. A 2-Way Synchronization will organize both diaries to match one another. The question is through which program has the overriding decision. Under this option you can select which program you wish to model the appointments on. If you select ClinicOffice then any appointments that are the same but have a different time, location or subject will be altered in Outlook to match ClinicOffice. If you select Outlook, the opposite happens. Please note that new appointments will not be affected by this option and will be synchronized in the usual manner.

- Once you have selected the Synchronization type and you are happy with its options, press the **Synchronize** button to start the synchronization process

Additional Information

Both Outlook and ClinicOffice have a similar structure to their appointments, but ClinicOffice has a few additional fields that are not present in Outlook. This is not a problem though as the ClinicOffice Synchronization has been designed to compensate for this. This does though require data to be entered into Outlook in a particular way for the desired information to be transferred across, although it is not essential.

Subject in Outlook – Description and Patient in ClinicOffice

In Outlook when you create a new appointment you will fill in the **Subject** field. The **Subject** field is the same as the **Description** field in ClinicOffice, but it also can cover the **Patient** field. When you export an appointment, with a patient assigned to it, you will notice that the Subject will be in this format '*Lastname, Firstname Title*'. So when creating a new appointment in Outlook, if you for example enter under the subject 'Davis, Mark Mr' and then import it into ClinicOffice, it will assign that appointment to Mr Mark Davis (this is so long as Mr Mark Davis is an actual record in ClinicOffice). Please note that text can be entered in any way you like, and it will be copied into the **Description** field either way.

Location in Outlook – Room and Clinic in ClinicOffice

The **Location** field in Outlook is the same as the **Room** and **Clinic** fields in ClinicOffice. When you export appointments from ClinicOffice into Outlook you will notice that the Location field for these appointments is entered in this format '*Room x* | *Clinic x*' (x=unique value). So, if an appointment was in Room 1 for Willoughby Road Clinic it will look like this: 'Room 1 | Willoughby Road Clinic'. If you want the location to be recognised when importing a new appointment into ClinicOffice from Outlook, you must make sure that the room name and clinic name match what is in ClinicOffice.

Category in Outlook – Appointment Type in ClinicOffice

In Outlook you can assign a **Category** to the appointments. The **Category** in Outlook is equivalent to the **Appointment Types** in ClinicOffice. You need to make sure that the name of the **Category** matches the name of ClinicOffices's **Appointment Type** for this to work properly. You can also assign a colour to the **Category** that matches the Appointment Type colour in ClinicOffice. Please note that Outlook can have two categories, ClinicOffice can only have one. If an appointment in Outlook has two categories, then both will be ignored when it is being imported into ClinicOffice and the Appointment Types field will be left blank.

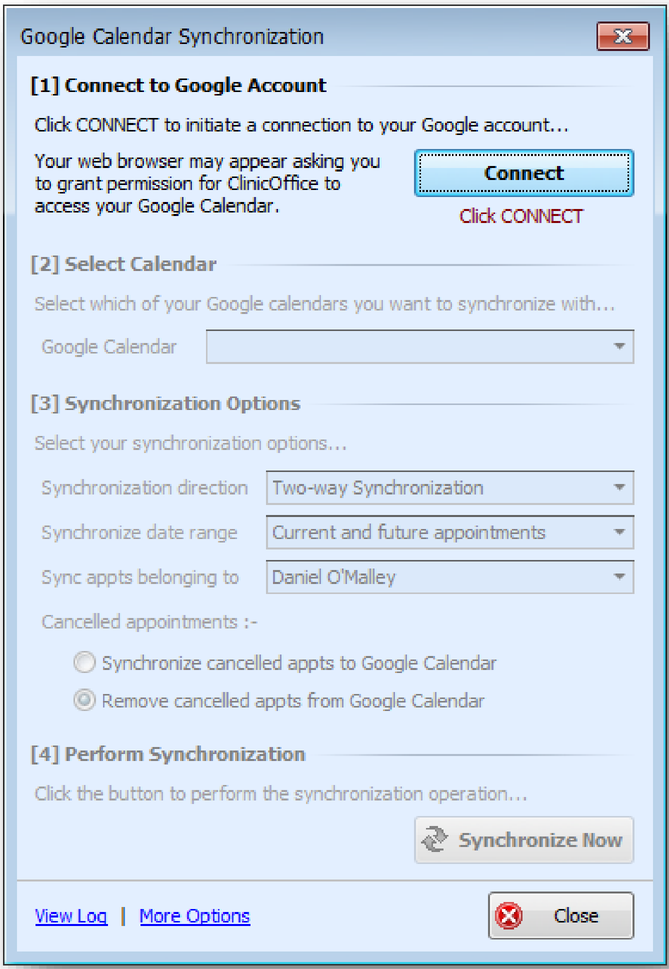
With a bit of practice the ClinicOffice Synchronization is incredibly easy to use. Note that the Synchronization is not automatic.

Google Calendar Synchronisation

To synchronize with Google Calendar, follow the steps below:

- Right-click anywhere in the main ClinicOffice Diary
- Select **Sync Calendar** then select **Sync with Google Calendar**
- The window to the right will appear:

Google Calendar Synchronization window



- Under step **[1]** click the **Connect** button; this will open a separate browser window and request for you to login to your Google account.
- Once logged in to your Google Account you need to click **Accept** to the next message that appears.
- Under step **[2]** if you have more than one calendar on your Google account, you can select which calendar you wish to synchronise with.
- Under step **[3]** select the **Synchronisation Direction**. You can choose either "Two-way synchronisation", "Export from ClinicOffice -> Google" or "Import from Google -> ClinicOffice". For more information on what each of these options do, please see the section "Outlook Synchronisation".
- Next in the field **Synchronise date range** you can select to synchronise only current and future appointments, appointments from the start of this month or year and onwards and appointments up to 12 months and onwards
- The next field **Sync appts belonging to**, you need to specify which staff member's appointments you wish to synchronise. Generally, it is recommended that you synchronise a single practitioner with one calendar or account.
- Below this is the section **Cancelled appointments** which allows you to specify what to do with appointments with the cancelled status. If you select **Synchronize cancelled appts to Google Calendar,** then all appointments that have been cancelled will be included in the synchronisation. These will have the term **[CANCELLED]** put in front of them. If you select **Remove cancelled appts from Google Calendar** instead, then any appointments marked as cancelled in ClinicOffice will just be removed or not even appear in the Google Calendar.
- When you have finished going through the options click the **Synchronize Now** button.

When the synchronisation has been completed you are offered the option to view the synchronisation log. If you wish to read it, click the **Yes** button. To exit the synchronisation screen, click the **Close** button.

Note 1: *In **Step 1** if the authentication process takes longer than 20 seconds ClinicOffice will present a message saying that it is "Unable to Connect". This is not a problem, just click **OK**, complete the authentication process in Google and click **Connect**. You will still be connected up.*

Note 2: *Due to Google's Security settings you will be required to repeat the authentication process in **Step 1**, when clicking the Connect button, every hour or whenever you log off from ClinicOffice and back.*

Note 3: *When you delete an appointment in Google Calendar it will not delete the appointment in the ClinicOffice diary. All that happens is that the corresponding appointment in ClinicOffice will have the additional text "-DELETED-" added to the appointment's description.*

Backing up and Restoring your Database

Backing Up a Database

Click the Tools menu at the top of the main ClinicOffice screen and click 

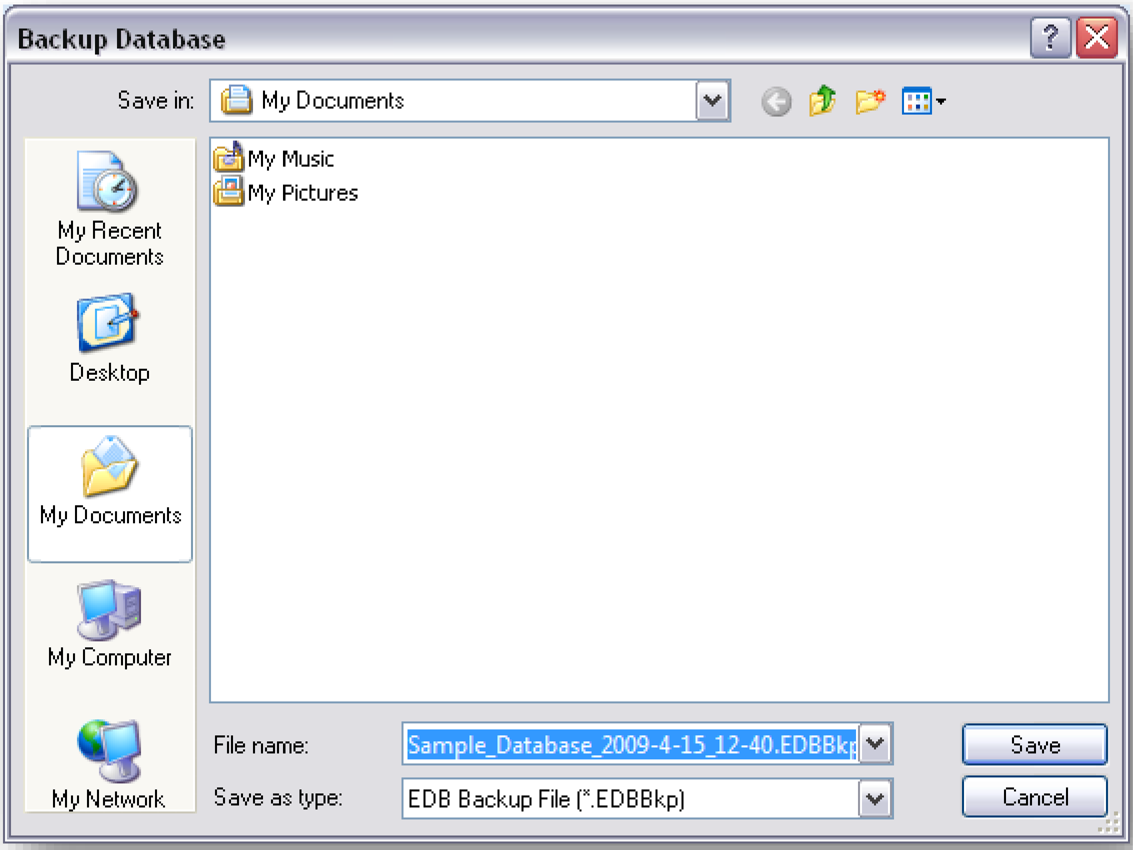
.

For a quicker more efficient backup it is advisable to do the backup on the computer that is hosting the database.

Please note that it is important to make sure that any other users are logged off before you perform a backup. If you were logged on, ClinicOffice will ask for permission to log you off before it can perform the backup.

The backup window will then appear on the screen.

Backup Window



ClinicOffice v5 will generate a filename based on your database name and the current date and time, but you can change the filename if you wish. You can also choose to save the backup to whatever location you want. If you are backing up the Startup/Professional Editions the resulting file is given a ".EDBBkp" extension. If you are backing up the Server Edition the resulting file is given a ".COv5_Backup" extension. Both of these extensions are ClinicOffice's own Zip format and would only be recognised by ClinicOffice.

However, please note that saving the file directly onto a writable CD/DVD is not likely to work. Even if the save appears to have succeeded, you will most likely still need to perform another operation to actually burn the CD/DVD using your CD burning software.

When you click the **Save** button you will be presented with a Backup Compression window.

Select the level of compression you would like to use and click **OK**. ClinicOffice Zip files contain a complete copy of your entire database.

This is not an incremental backup. For that kind of functionality, we recommend using a 3rd party backup solution rather than this feature in ClinicOffice.

When you log out from your database, ClinicOffice will automatically remind you to take a backup. You can alter how often ClinicOffice reminds you by going to the Database Settings. To get to this go to your **View** menu and click on the **Program Settings** button. When the Setting window opens you will notice the **Database Settings** tab. You will note that you can choose to stop the backup reminders simply by un-ticking the box **Remind me to Backup**.

Remember the more frequent your backups are the less information that will be lost if something does go wrong.

Restoring a Database

Click the **Tools** menu at the top of the main ClinicOffice screen and click 

.

Please note that it is important to make sure that any other users are logged off before you perform a restore. If you were logged on, ClinicOffice will ask for permission to log you off before it can perform the restore operation.

The restore window will then appear on the screen; like the backup window you are able to locate your backup file. So locate your database and then click **Open**. ClinicOffice will ask you if you want to create a new database or overwrite the current one you are looking at. If you choose to create a new database then you need to assign it a name. If you on the other hand choose to overwrite the selected database a message will come up asking you to confirm this, click **YES**, then type **YES** and click **OK**, and then close the COv5 databases window. You can now select the new database from the logon screen and log onto it.

***** IMPORTANT NOTE *****

If you choose to overwrite your existing database, this will destroy your current database and replace it with the one in the backup file. Please only perform this operation if you are absolutely certain that this is what you want to do.

If you are restoring a backup of a database that wasn't on your computer previously, then it would be wise to restore it as a new database.

Note: *We **strongly** recommend that you copy your backup files on to some external media (e.g. backup tape, CD/DVD, external disk drive, flash drive/memory card, online etc.) which you should remove from your premises. We also recommend that you keep numerous copies of your backup files on different media rather than just relying on one memory stick or external disk. Please see the ClinicOffice Forum FAQ's for more information on Backup strategies.*

Pioneer Software cannot be held in any way responsible for any loss of data and subsequent inability to restore from a backup, resulting from an inadequate backup strategy.

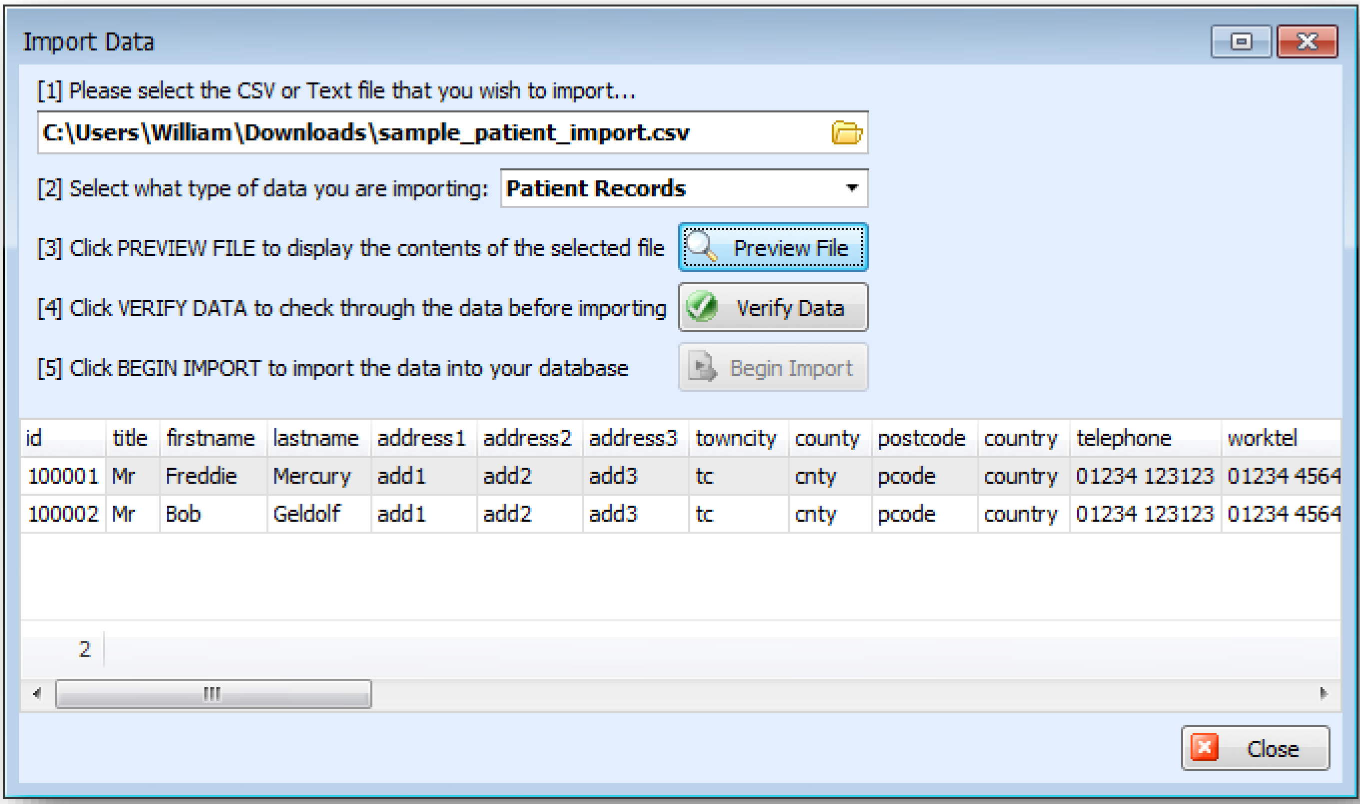
Importing Data

ClinicOffice has the ability to import data that is saved as a CSV file (**C**omma **S**eparated **V**ariable format). The CSV file can be created in Microsoft Excel; the option is given to you when you save the spreadsheet.

To import the data follow the steps below:

- Go to the **Tools** menu and click the **Import Data** button
- You need to first locate your CSV file
- Once you have located the directory of the file select the type of data that you are importing (i.e. Patient or Contact Records)

Import Data Window



- Now you need to click the **Preview File** button (this may take some time depending on the amount of data). This now previews the data with its records.
- Click the **Verify Data** button to see how compatible your data is with ClinicOffice
- A message will appear signalling if the data is valid. Click **Yes**, to see the validation messages. This now opens Notepad and displays what will occur when you actually import the data such as what will be included in the import and what will be ignored. This in turn will give you an idea if you need to rename some of the column headers within your CSV file. If you do make any adjustments to the CSV file, please repeat the steps above.
- Finally click **Begin Import** button. A message will appear displaying how many records where imported successfully. Press **OK.**

Once you have finished press the **Close** button. Everything that has been successfully imported will now be present on your database.

Note: *For more information please see the COv5 Frequently Asked Questions on the ClinicOffice Support Forum (www.clinicofficeforum.co.uk) on the subject," Can I import data into my database?" This also contains sample spreadsheets that can be used to practice importing data.*

Additional Information: *Patient records can now be updated via a CSV file by adding an 'UPDATE' column to it. Set the row values to "TRUE" for this new column. You will also need to include either an "id" column or "code" column to match the existing patient "id" or "code" stored within the database.*

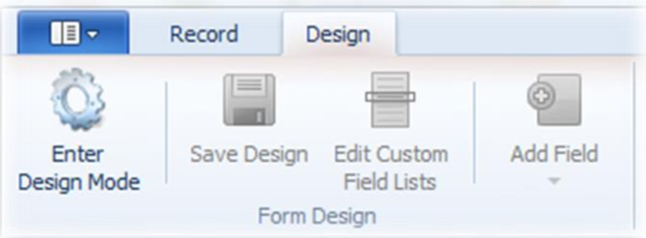
Designing and Customising ClinicOffice

ClinicOffice has been designed to be intuitive to the user and visually appealing. The layout of the program enables a person to carry out a task in seconds, which by hand would have taken them minutes. Every editor (i.e. Patient or Appointment Editor) has a particular default layout which for most is quite adequate but it might not suite everybody. This is why ClinicOffice has a feature which will enable the users to change the layout of an editor completely.

To edit the layout of an editor follow the example below:-

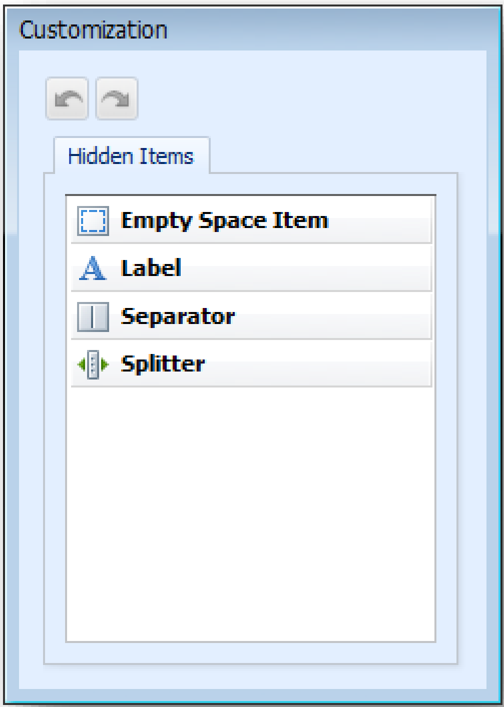
- Go to the Patient Grid.
- Open up a patient's record.
- At the top of the Patient Editor's ribbon bar is the **Design** Tab, click on this.

Design Tab on Patient Editor Ribbon Bar



- To enter the design mode click on the **ENTER DESIGN MODE** button. You will notice a Customization menu appear.

Customization Window



- Now click on the **Custom Fields** tab in the Patient Editor.
- If there are fields already there you can remove them by right-clicking on one of the fields and selecting **Delete Field**.
- If you do not wish to delete the field, right-click on the field and select **Hide Field.** The field will then add itself to the Hidden Items on the Customization window.
- Continue to delete or hide the fields under Custom Fields until you feel satisfied.

Now that we have some free space we can start adding fields. To do this, follow the instructions below:-

- Click on the Customization menu and then click on the **ADD FIELD** button which is located on the ribbon bar.
- Choose from the pull down menu **Text Field**. Enter a name for it and then press **OK**.
- Left-click on the new field, drag it from the Customization menu and drop it into the place of your choosing within the Custom Fields under the Patient Editor.

You have now created your first field. You might have found it pointless clicking on the Customization menu, but by doing this the new field you have created will be added to the menu; otherwise ClinicOffice will place it below an existing field within the Patient Editor.

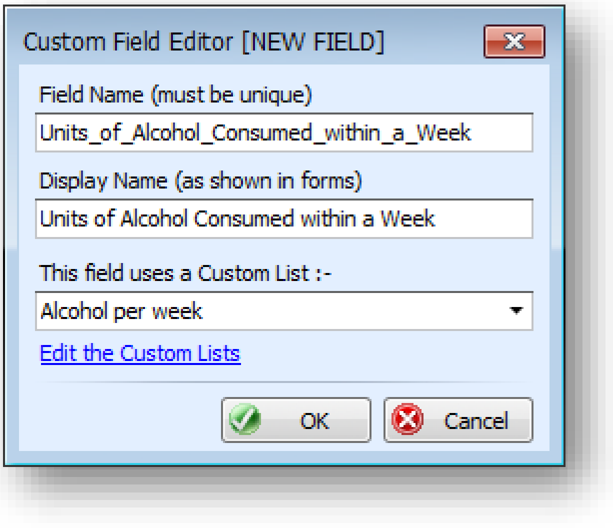
You can hide the field name completely by right-clicking on the field and selecting **Label Position** and then click **Top**. This positions the label so that it is above main the field. If you right-click again on the field and then click **Hide Label**, the label will be hidden from view. The reason why you would use this method is that if you were to hide the field label straight away then you will be left with a blank space.

A Checkbox field will automatically have a space on the left hand side of it, this is a hidden label. To remove it first right-click on the field then click **Show Label**, use the same method as mentioned before to the remove this label. This leaves you with a well-structured editor.

As you probably have noticed there a several custom fields to choose from. Each editor will vary on the types of custom fields. All fields are created in the same manner except for one which is the List Field. The reason for this is that there are more variables involved with this field. Please follow the instructions below to create one.

- Like before click on the Customization menu, then click the **ADD FIELD** button and select **List Field**.
- Enter a name and choose one of the predefined lists. It will look like something like the example below.

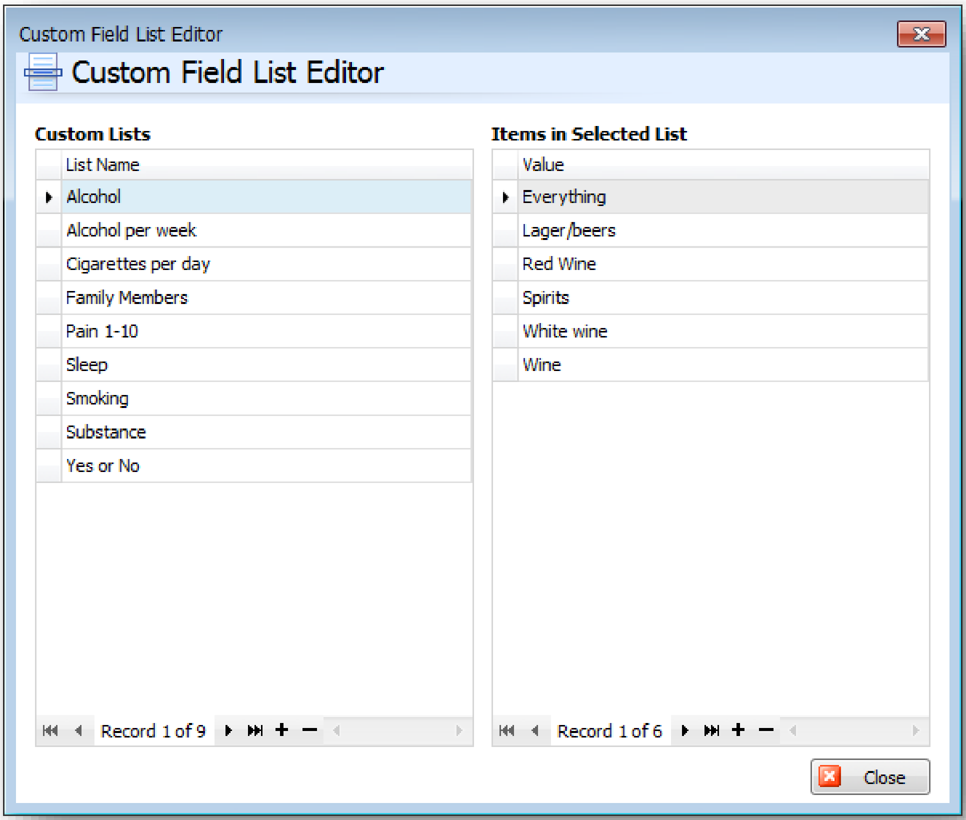
Custom Field List



- Click **OK**. The field will be added in the same manner as the other fields.

You will notice that this field has a pull down menu and you can choose from the selection. You may edit the list and even create your own one. To do this click on the **EDIT CUSTOM FIELD LISTS** button located on the ribbon bar. The following window will appear:-

Custom Field List Editor Window



On the left hand side are the Custom Lists, which is the field category. On the right hand side you have the values. This makes up the content of the custom list. By clicking on the + or − buttons on either side you can add or remove a field.

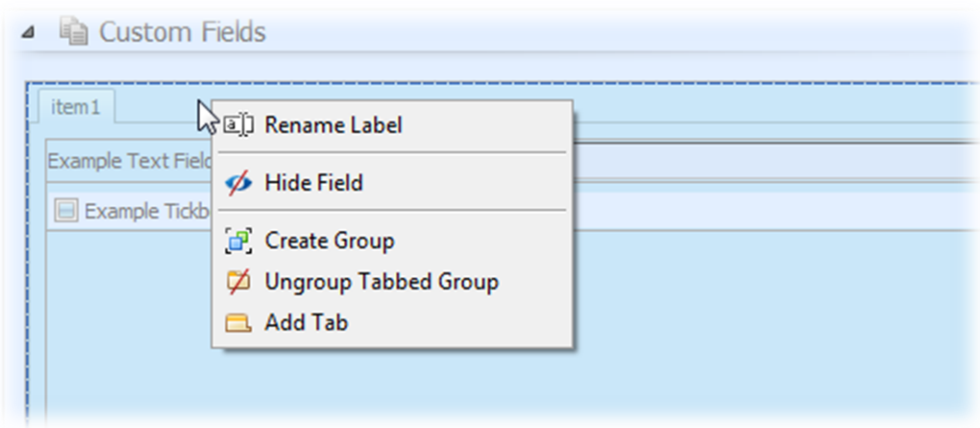
Grouping Fields

When you are in the design mode you can group fields together so that they will all come underneath one main heading. To group a field just right-click on it, then press **Group**. ClinicOffice will assign it a default name of 'item1'. You can rename this by right-clicking on the group name and then click **Rename Label**, type in the name you wish and press **OK**.

You can add another field to this group by left-clicking, then dragging and dropping it into the group box.

After you have created a group you can make this into a tab. To do this right-click on the group name and select **Create Tabbed Group**. You can add another tab by just right-clicking in the empty row next to the group name and select **Add Tab**.

Right-Clicking and Add Tab



This tab will be given a default name such as 'item2'. You can change this in the same way you would rename a group name. By adding a new tab it is like adding another page to the editor.

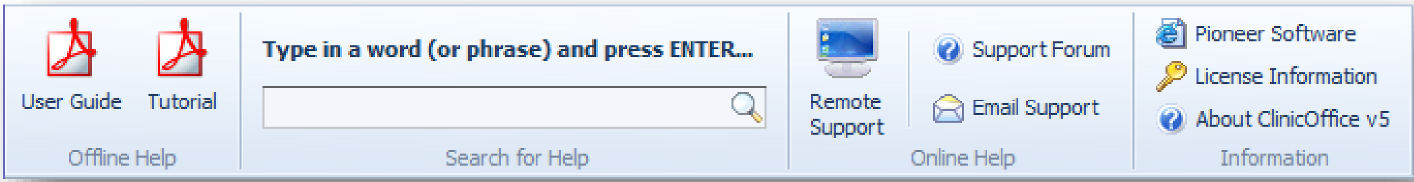
The best way to get to grips with the Design Mode is to play around with it. Remember if you alter the layout of an editor you do not have to save it. The editor will then revert back to how it was before you entered into the Design Mode.

You can create a Custom Form with the Clinical Notes using the same method, see the "Designing Forms" section of this User Guide.

Appendix – Help Resources

For additional help on ClinicOffice v5 please see the **Help** menu.

Help Menu



Not only does it provide the User Guide and Tutorial, but you can access our support forum from here as well. Displayed here is an additional search box which will enable you to search the support forum based on key words or phrases. For example you can enter "Undelete" and it will search for all words in the forum related Undelete. There is the option to Post a Question to the forum if you cannot find what you are looking for. You may also use our Online Help Desk and the Email Support also for questions.

If you require further assistance our pre-sales and support helpdesk is **01205 205500** if you are 'test-driving' ClinicOffice or you need assistance with ClinicOffice and you are on the Support Plan.

Section 3 - ClinicOffice v5 Tutorial

Preparing for the Tutorial

This tutorial is designed to take you step by step through some of the basic features of ClinicOffice v5 using the sample database.

By the time you have followed the tutorial through, you will be able to:-

- Create a new staff member & assign working hours
- Enter new patients
- Book, Edit & Move appointments
- Send / Receive Messages
- Create Session Notes with additional attachments
- Create invoices and take payments

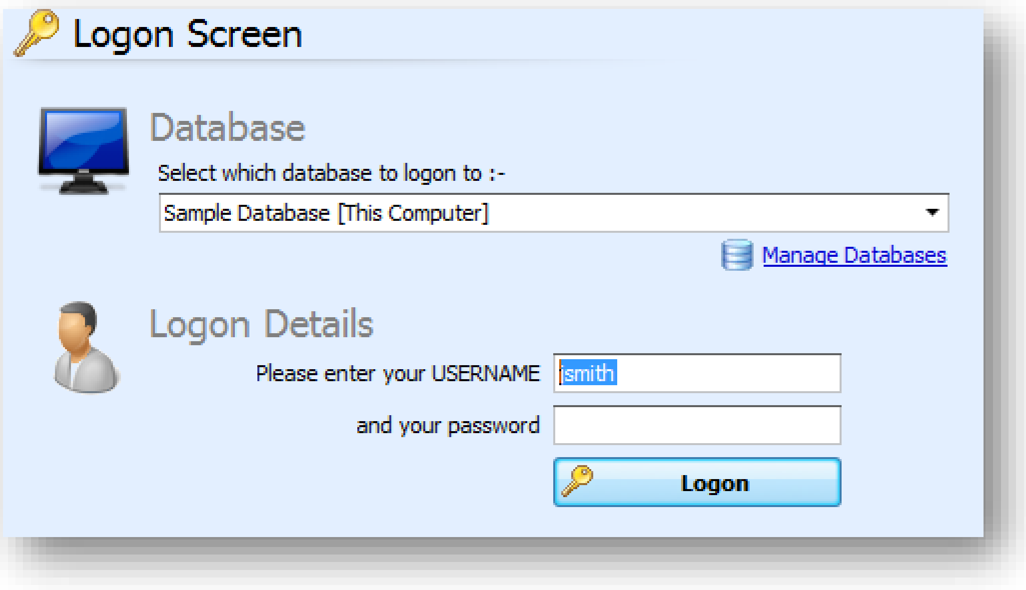
If you have not yet done so, you will need to install ClinicOffice on your computer. Please refer to the Getting Started section of your user guide for installation instructions.

Logging On to the Sample Database

For the purposes of this tutorial, we will be working with a fictitious sample database which contains the data for a clinic called "Willoughby Road Clinic". This is available in the Trial, Startup and Professional editions of ClinicOffice.

Every time you start ClinicOffice v5, the first thing you will have to do is log onto your database. This is for security reasons as patient information is obviously highly confidential.

Logging on to your clinic



To log on to the sample database:-

- Select the Sample Database (if it is not already selected)
- Type **jsmith** in the username box (as shown)
- Leave the password box *empty*
- Left-click on the **LOGON** button

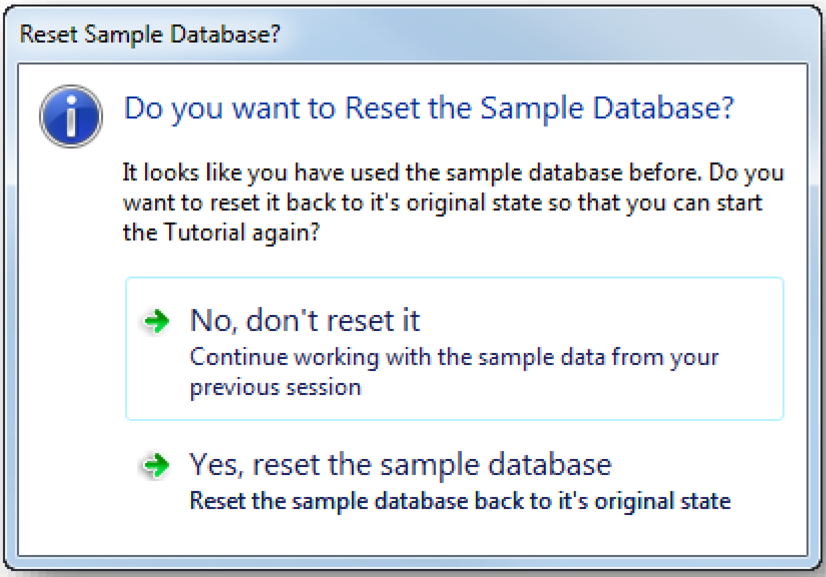
If you entered the username or password incorrectly, ClinicOffice will notify you. In this case, please check that you have not entered any spaces before or after the "jsmith" and please make sure that the password is completely blank.

If this is the first time you have logged on then you will be taken straight to the ClinicOffice Home Page, otherwise you will be prompted to reset the Sample Database.

Resetting the Sample Database

You will notice that once you have clicked Logon, you are prompted with the reset the sample database window.

Reset Sample Database



When prompted please click yes to resetting the database as this will make the tutorial relevant. This brings all the appointments / Invoices / Payments etc to the week that we are currently in. This therefore allows you to work on the database with relevant data.

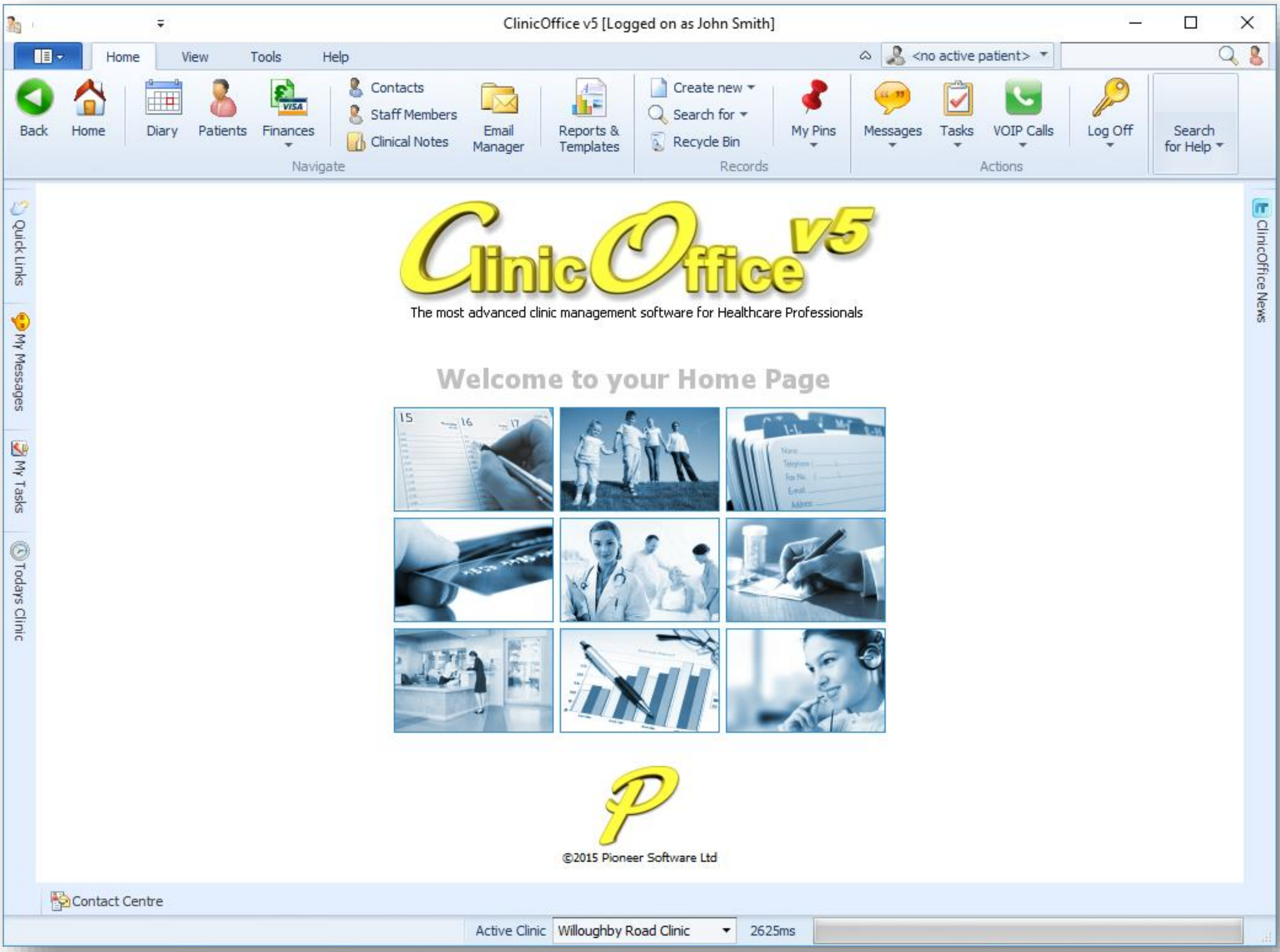
Once you have done this you will be directed to the Home page.

Your ClinicOffice v5 Home Page

Take a little time to look around this screen and familiarise yourself with it. From here you can access all areas of ClinicOffice v5 by simply clicking on the appropriate picture, button or text link.

You will be returning to this screen frequently, so you'll get to know it quite well.

The ClinicOffice v5 Home Page



You can return to this home page at any time by clicking the  button which is always available at the top of the screen when you are logged on to a database.

Creating a New Staff Member

Willoughby Road Clinic is expanding. Currently Mr John Smith is the owner of the practice and has 2 associates plus a receptionist (Miss Rebecca White) who he employs full-time.

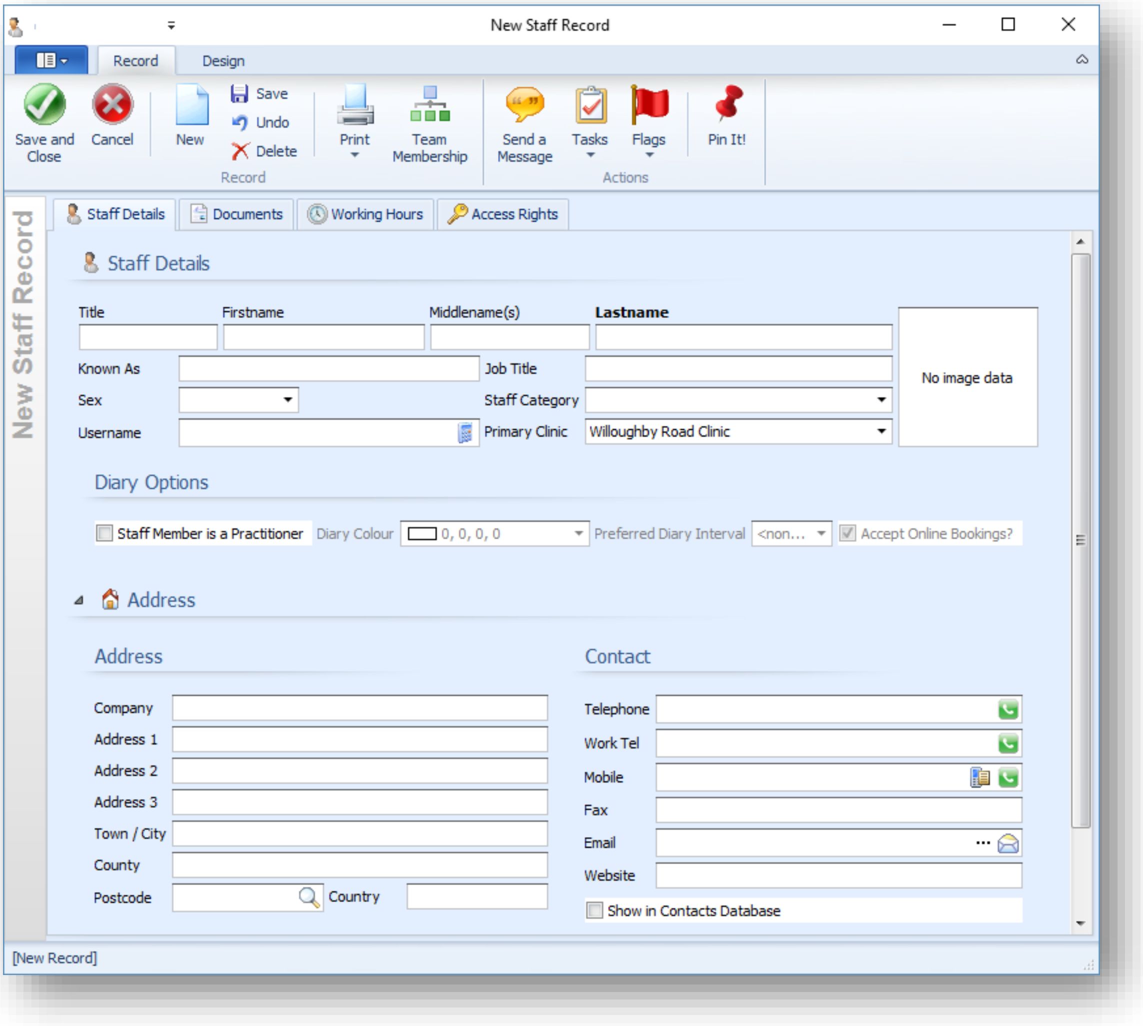
Due to an increased workload though, he's now taking on **Miss Rachel Brown** – a promising young practitioner who will help on a part-time basis.

So, our first job is to add Rachel to the staff list:-

- From the Home Page, click on **Staff Members**, the middle button on the home page. This takes you to the Staff Members screen which shows your current staff members.
- To create a new record, right-click on the grid and choose **New Staff Member**.

The **Staff Editor** will appear on the screen (as shown below) ready for you to enter the new details.

The Staff Editor



Entering Basic Contact Details

We now need to enter some details about the new staff member. If you look closely the cursor should be flashing in the **Title** box (if not, then left-click in that box).

- Type in "Miss" (without the quotes).
- Now press the **<TAB>** key. You should notice that the cursor has moved on to the next box.
- Type in "Rachel" (again, without the quotes). Press <**TAB**>.
- Type in "Brown".

Tip: *In ClinicOffice v5, you use the TAB key to move on to the next field. If you hold down the SHIFT key at the same time (i.e. SHIFT+TAB) then the cursor will go back to the previous field.*

Practice entering data by typing in Miss Rachel Brown's address and telephone number. Here are the values to enter:-

- Known As   Rachel Brown
- Job Title   Associate Practitioner
- Username   rbrown
- Address 1   71 Willoughby Road
- Town/City   Boston
- County   Lincolnshire
- Postcode   PE21 9HN (try using the Loqate Address Finder)
- Country   UK
- Telephone   01205 123456

If you want some more practice, you can enter other information for her too, such as mobile telephone, email address etc. You can even choose a photo for her by right-clicking on the "No image selected," clicking the 'open image' and locating it on your hard disc. It's important to get comfortable with entering data, because entering data on screens like this is used frequently throughout ClinicOffice. If you are happy then we can continue.

Staff Details

There are some important staff fields on this screen:-

Known As

This is the name which will be used throughout ClinicOffice when referring to this staff member. For now, we'll leave it as "Brown, Rachel Miss".

Username

This is the name which this staff member will use when logging on to the database. The default is "rbrown" which will be fine for now (press icon to generate username).

Job Title

Rachel's job title is "Associate Practitioner" – please key it in.

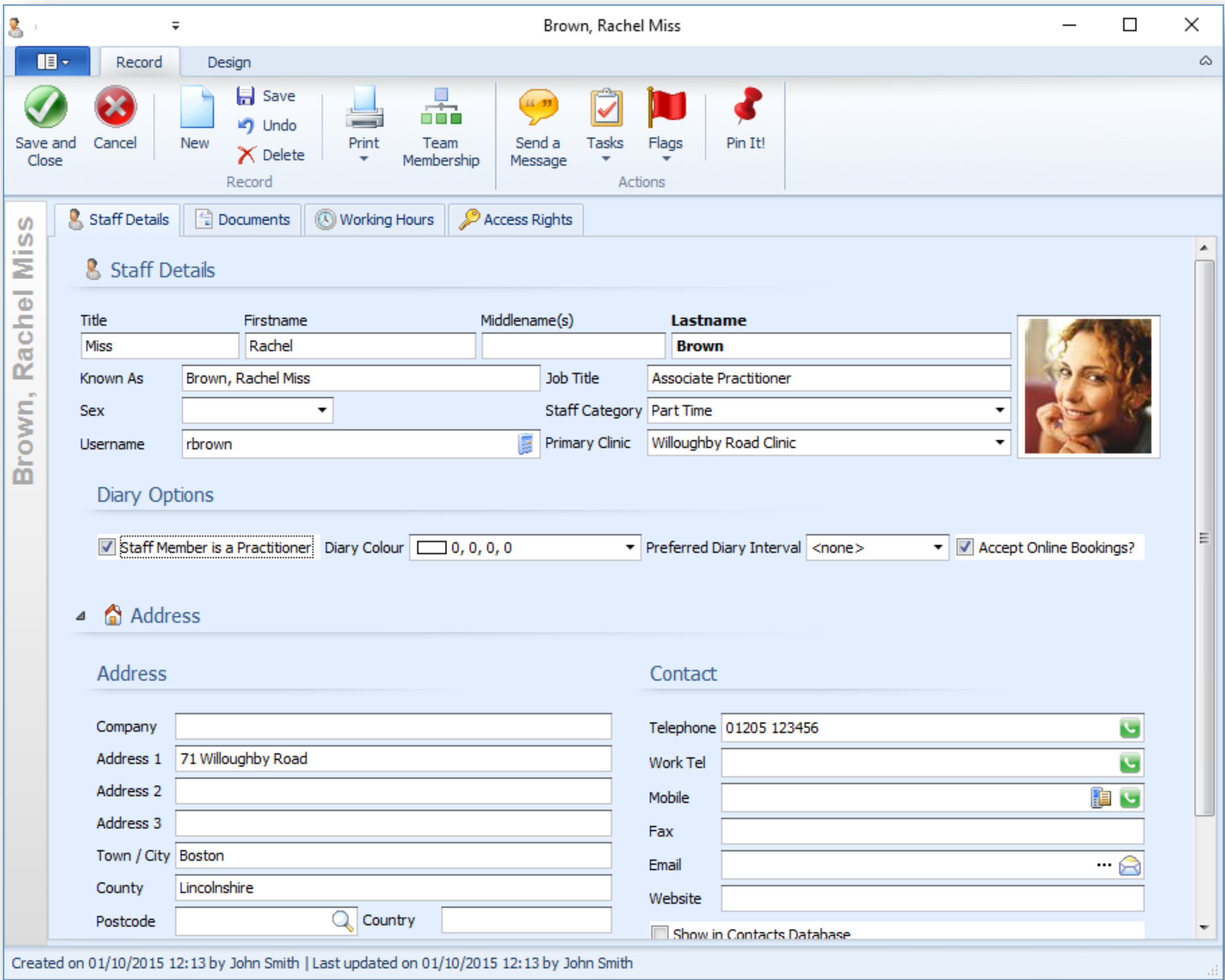
Staff Category

This field allows you to categorise staff members. In this case, Rachel is working part-time at the clinic, so select "Part Time" from the list.

Staff Member is a Practitioner

This is an important field, which tells ClinicOffice whether this person is a practitioner or a member of the support staff. "Rachel Brown" is a practitioner, so we need to tick this box under the Diary Options.

Completed Staff Editor

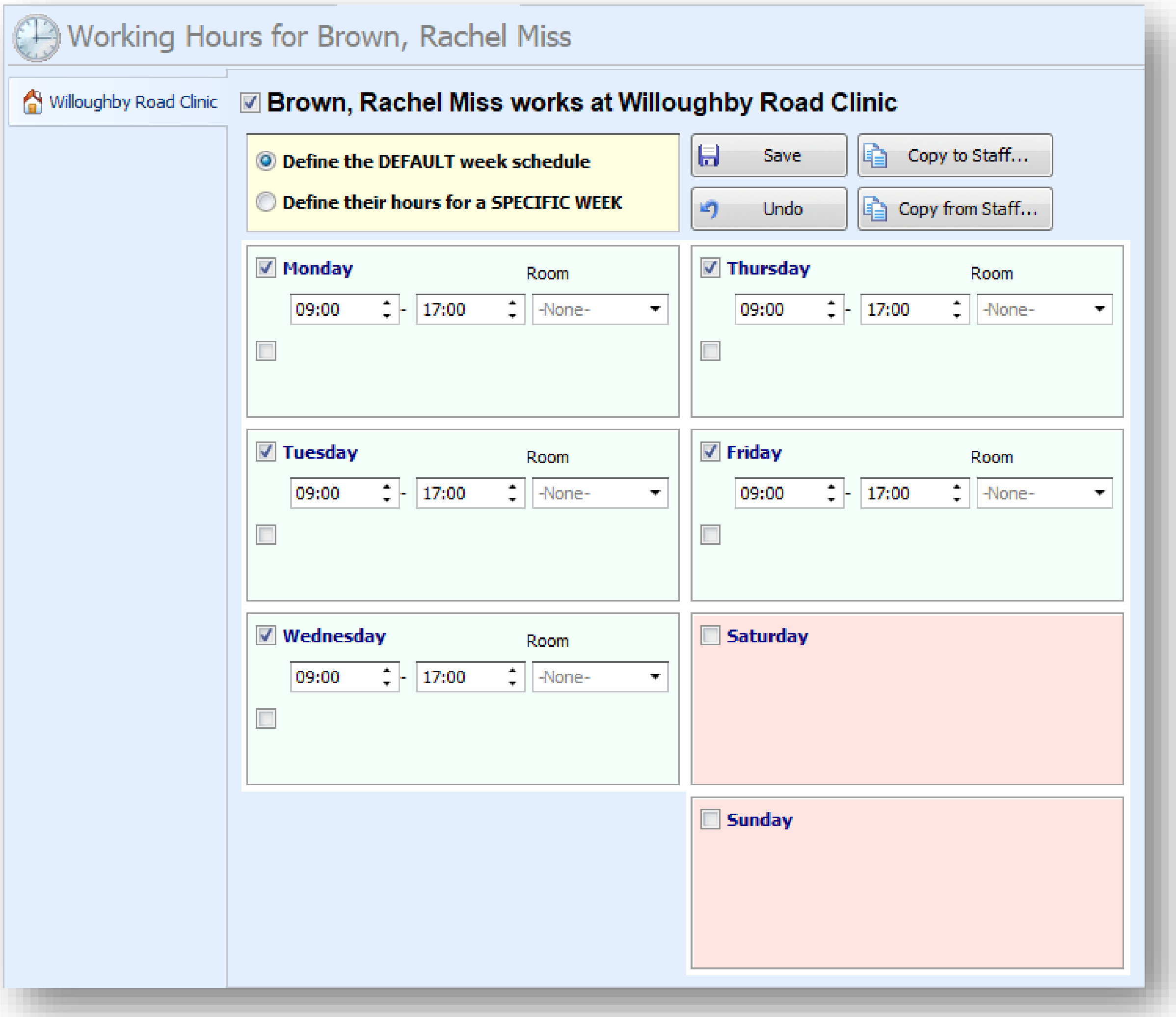


Setting Staff Working Hours

First, we need to tell ClinicOffice that Rachel will be working at this clinic and then set her working hours. This is important because it will display her working hours on the diary, displaying when she is available. Also, ClinicOffice will inform you when you try to book an appointment outside of her working hours.

Click the **Working Hours** tab on the staff editor

Staff Editor – Working Hours



Tick the box which says **Brown, Rachel Miss works at Willoughby Road Clinic**. For each day you can now select up to 3 sections of working hours. Plus, you can set different working hours for specific weeks by selecting **Define their hours for a specific week**; we will not worry about this now.

For new staff members, ClinicOffice defaults to the clinic's opening hours, which (as you can see) are 09:00 to 17:00 Monday to Friday.

You may recall however that Rachel Brown will be working part time, so we need to change this pattern of working hours. In fact, her working hours are as follows:-

Monday	(09:00 – 18:00)
Wednesday	(09:00 – 18:00)
Thursday	(09:00 – 12:30)

Here's what we need to do:-

- Set Monday's 17:00 to 18:00. Do this by clicking on the upwards arrow.
- She doesn't work on Tuesdays, so un-tick the tick box next to the day's title
- Set Wednesday's 17:00 to 18:00
- Friday also needs to be un-ticked
- Thursday needs to be adjusted. Left-click inside the box that says 17:00 and type in **1230**. When entering the value in make sure it is done quickly, otherwise the number will not be entered in sequentially.

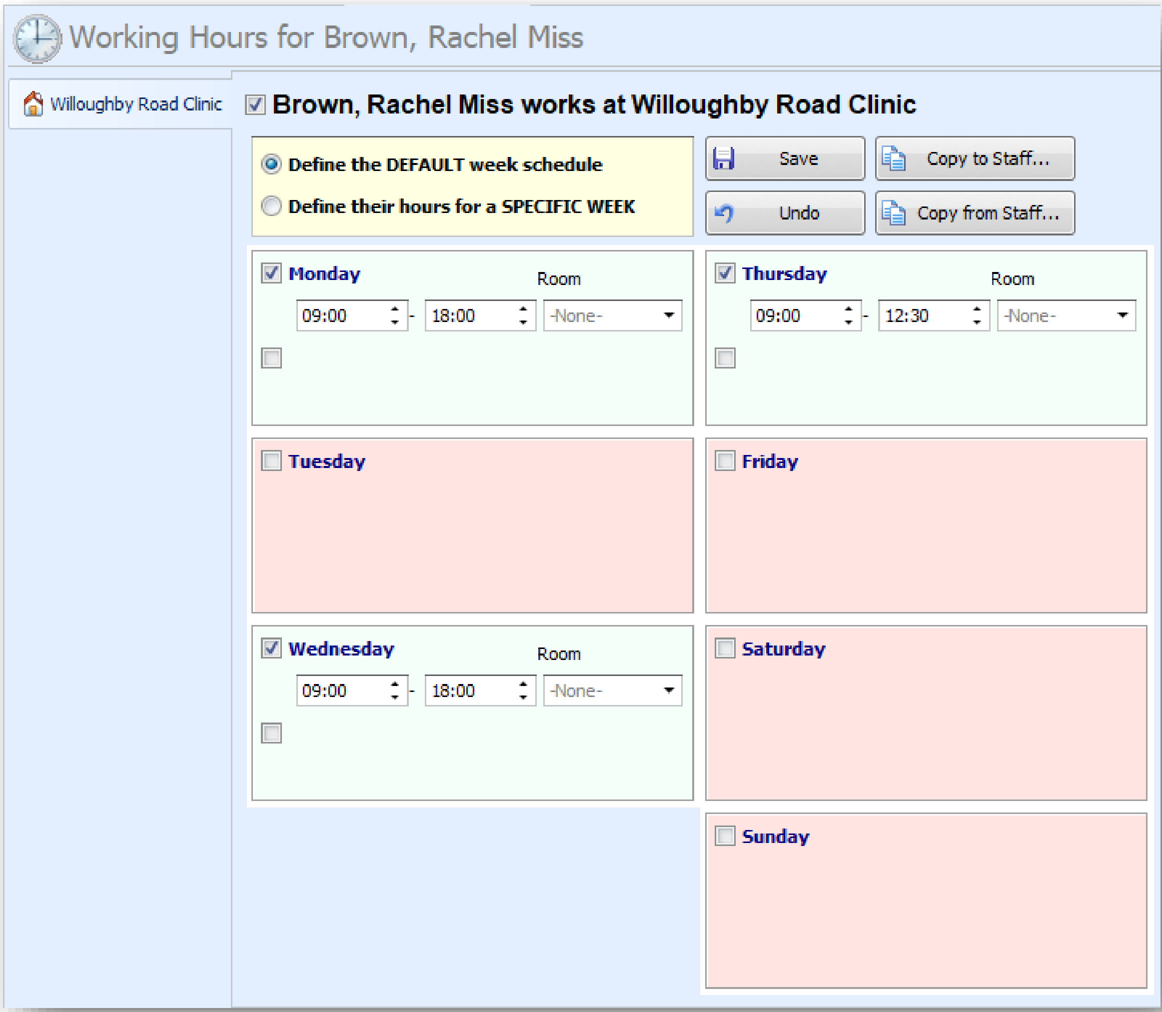
Q. **What if I get it wrong and mess this up?**

Don't panic! Simply use the **Undo** button (next to the **Save** button) to undo the changes made to the working hours.

⚠ **CAUTION!** There are two undo buttons on this screen. The other one is at the top of the editor (on the ribbon bar) which will undo all changes made to this staff member since the last save. We should be using the undo button in the Working Hours section.

All being well, we should now see that Rachel Brown's working hours are correctly set for Monday, Wednesday and a ½ day on Thursday, as shown below:-

Rachel Brown's working Hours



Saving the Record

Now that we have entered Rachel's personal details and her working hours, all that's left is to save our new staff member.

Simply click the 

button located on the ribbon bar at the top left of the Staff Editor.

ClinicOffice will beep at you (if you have sounds enabled on your computer) to let you know it has saved the record, and the Staff Editor will close.

Congratulations! We have now completed adding a staff member to the database. You'll notice that you are able to select **Miss Rachel Brown** in the Diary's list of staff members.

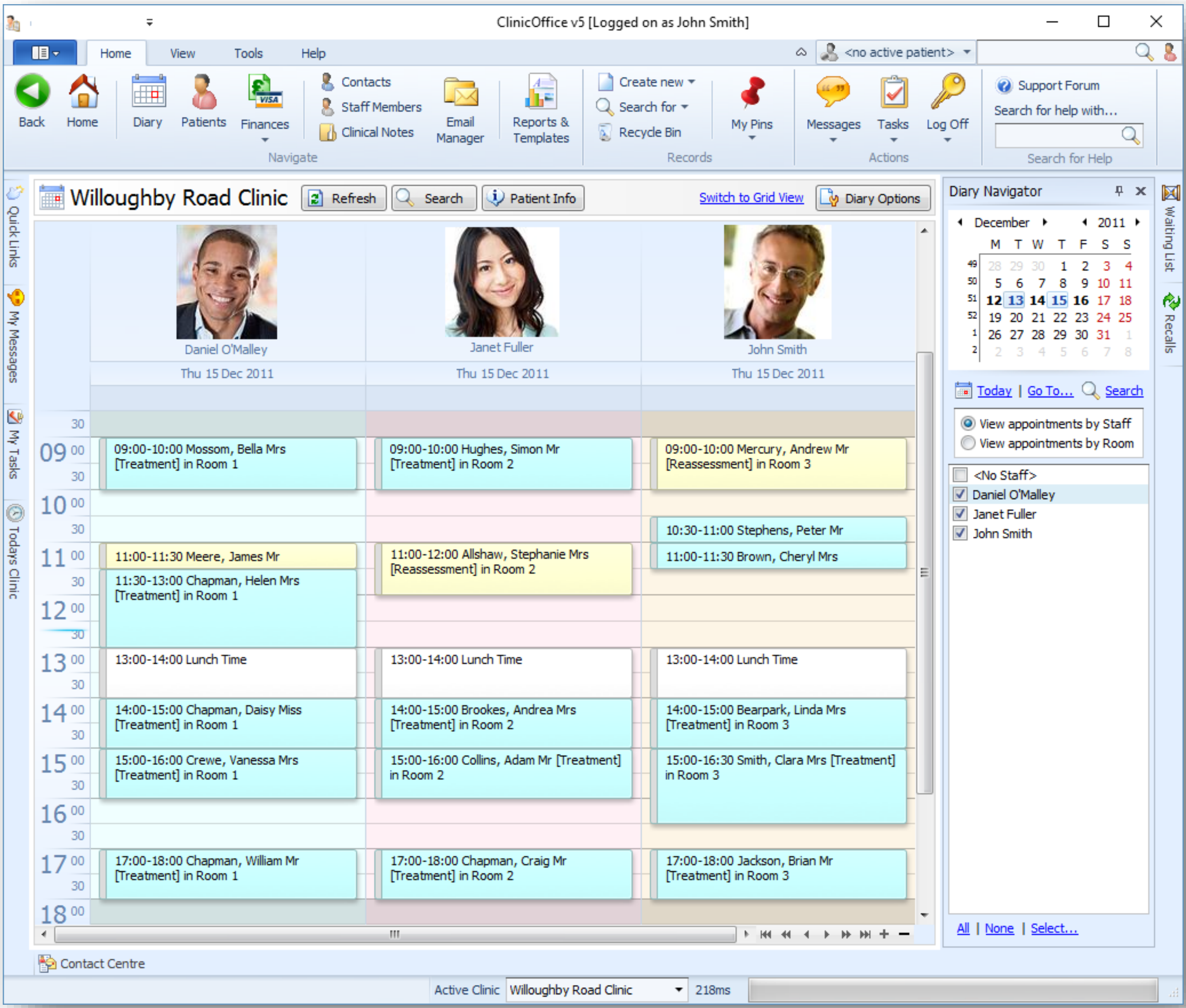
Next, we'll look at the appointments diary.

Introducing the Appointment Diary

Now click on the  **Appointment Diary** button to take us into the diary.

Let's take a moment or two to get to grips with this screen:-

The Appointment Diary



The main diary area is where the appointments are shown. The calendar (top right inside Diary Navigator) allows you to select which date(s) you want to look at in the diary.

Underneath the calendar you will see 2 Diary View options that allow you to change the display style of the diary (i.e. View appointments by staff or by Room).

Finally, we have the staff list (or room list, dependant on which view you have selected) which tells us which staff members (or rooms) we are currently looking at.

Setting up the Diary

Before we can add an appointment, we just need to make sure that the diary is set up correctly.

We want to make sure that the diary intervals are set to 30 minutes (if they are not already set to that). Of course, for your own clinic, you may want to use a different interval setting, but for this tutorial we'll use 30 minute blocks.

- *Right-click* on the time ruler on the left side of the diary.
- Select the 30 minute option.

The most common way of viewing the diary is by staff. Make sure the staff view is selected:-

- Underneath the calendar, make sure that **View appointments by Staff** is selected
- Tick both **John Smith** and **Rachel Brown** (our new staff member) in the staff list and un-tick the other 2 staff members.

We should now have only two columns in the diary – one for John and the other for Rachel. When you start using your own data later, your diary will look similar to this although it may have more or less columns, depending on how many practitioners you have.

You will notice that the appointments that have been auto-created are invoiced up to Tuesday so imagine that today is Wednesday.

Creating an Appointment

Let's imagine that the telephone rings and **Mrs Andrea Brookes** is calling to book a treatment for Thursday. Mrs Brookes has been many times before, so we know she's already on the system and we also know that she is usually treated by John Smith.

- Select Thursday on the calendar by clicking on it. Scanning through the day, it appears that John Smith is only free just before Lunch so we offer her a choice of any time around 12pm. She asks for 11.30am.
- Double-click on the slot between **11:30–12:00** in **John Smith's** column. This brings up the Appointment Editor.
- Notice that ClinicOffice has already filled in the date, time and staff member for you. *So* all we need to do is tell the system who the patient is and what type of appointment it is.
- Click the search button at the end of the **Patient** field. Clicking this button brings up the **Patient/Contact Selector** window.
- Make sure the cursor is in the search edit box, and type in **"br"** and then press Enter. This will locate anyone whose name starts "Br…". Click on **Mrs Andrea Brookes** and then click **OK** (or you can double-click on her name).
- Notice that she now appears in the patient box of the Appointment Editor. Next we want to set the appointment type which is a **Treatment**.
- Finally we click **SAVE AND CLOSE** to save the appointment.

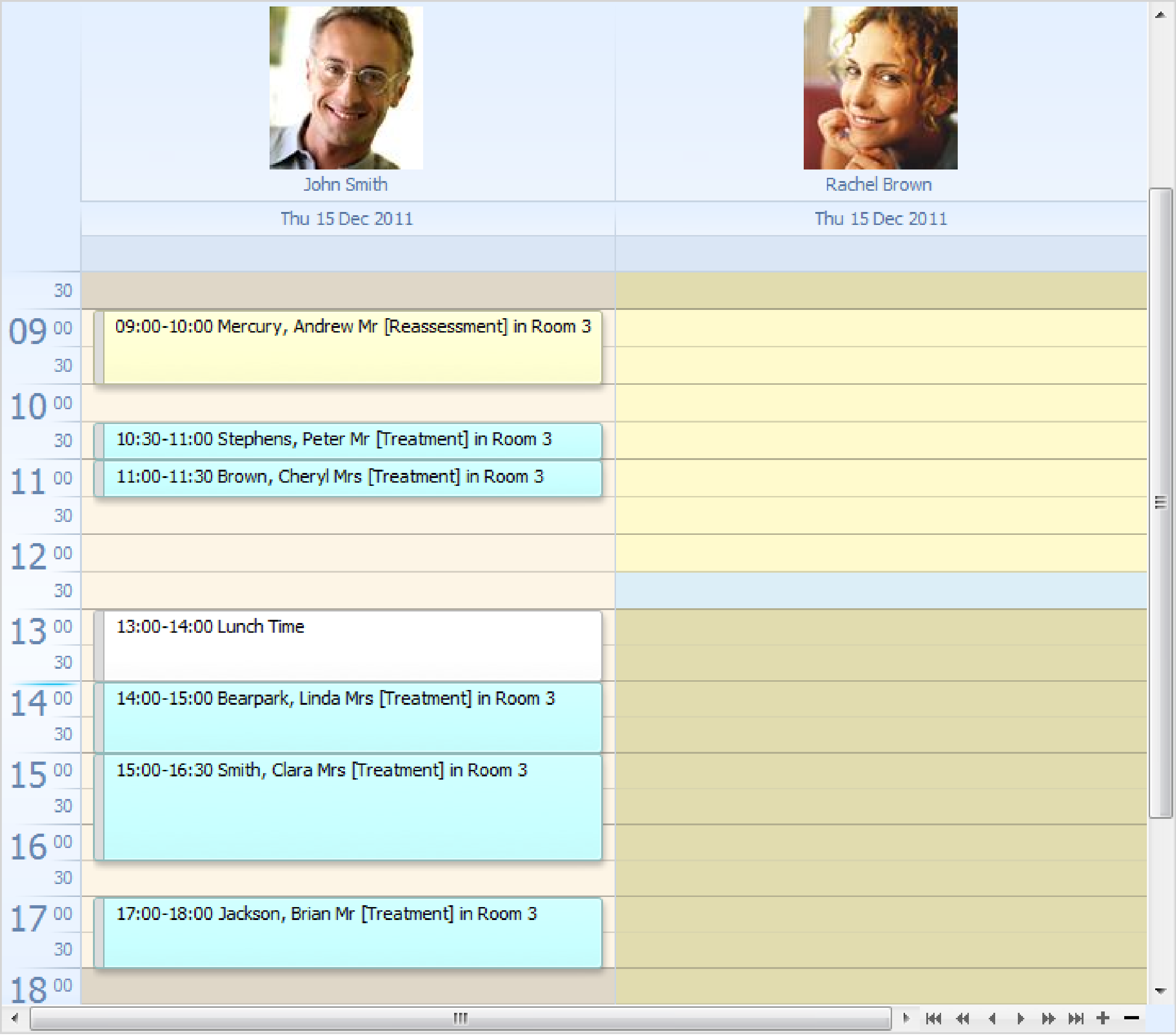
Congratulations on your first appointment! Let's try another one.

Mr Brian Jackson telephones in and would also like to book a ½ hour treatment for Thursday with **John Smith**. He says that **12:00** would be ideal for him.

Following the steps just outlined, have a go at booking his appointment. You will note that when you click **Save and Close** a message will appear saying "Jackson, Brian [27] has a different Default Practitioner". In this situation click "Keep practitioner as: John Smith".

After saving this second appointment, our diary for Thursday should look something like this:-

Appointment Diary after Second Appointment



Barely a few minutes later **"Mrs Joan Campbell"** telephones. She identifies herself as a new patient who hasn't been to your clinic before. As a new patient she would like an **hour-long consultation** also on Thursday between **11:00–12:00**.

This appointment is different from the last two because (1) she's a new patient; not yet on the system and (2) because consultations are an hour long rather than ½ hour for just a treatment.

Here's what to do:-

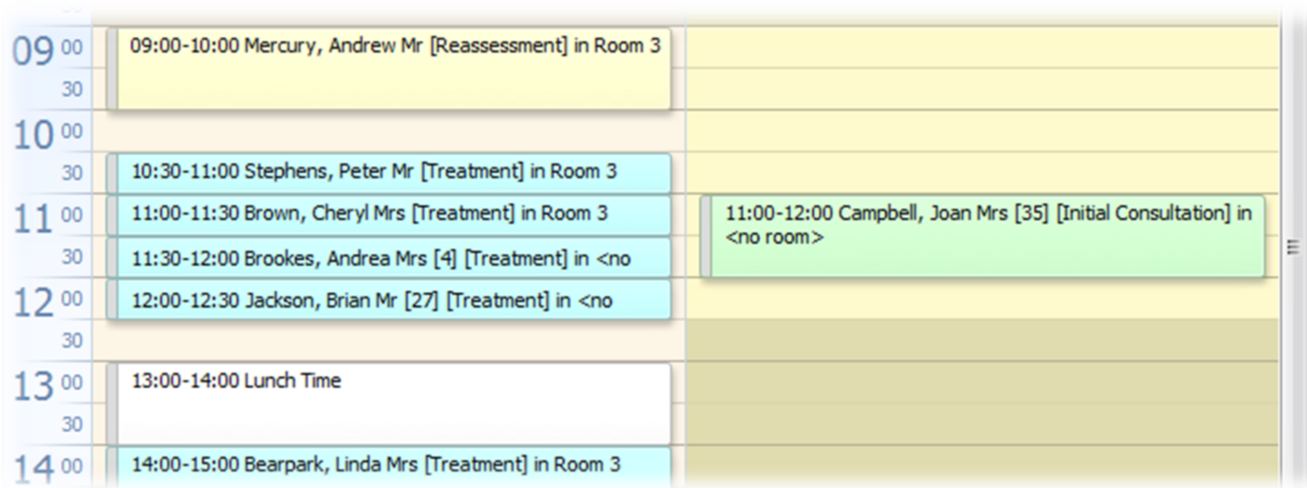
- Select BOTH slots from 11:00–12:00 in Rachel Browns diary column, by dragging down with the left mouse button. This will highlight both slots in blue.
- Right-click the mouse over the selected slots, and click on **New Appointment** in the menu. As before this brings up the Appointment Editor. Notice that this time, the duration of the appointment is an hour long.
- **Mrs Joan Campbell** is a **new** patient, so there's no point searching for her. Instead, click the new button ( ) at the end of the patient field.

Create a New Record Message

- The system will ask if she's a new *patient* or *contact*. Click **New PATIENT Record**. This opens the Patient Editor.
- As mentioned earlier, Mrs Campbell is on the telephone, so it's most likely that you wouldn't take all her details until she comes in for her appointment, so we'll just enter her name and telephone number.
- Her Title is "Mrs"
- Her Firstname is "Joan"
- Her Surname is "Campbell"
- Her Telephone number is "01205 368685"
- Click **SAVE AND CLOSE** to save her as a new patient (notice that her name now appears in the patient field).
- If you are prompted to assign a patient code, click yes.
- Set the appointment type to **Initial Consultation.**
- Click **SAVE AND CLOSE**.

You should now see the hour-long consultation in your diary:-

Appointment Diary after Initial Consultation

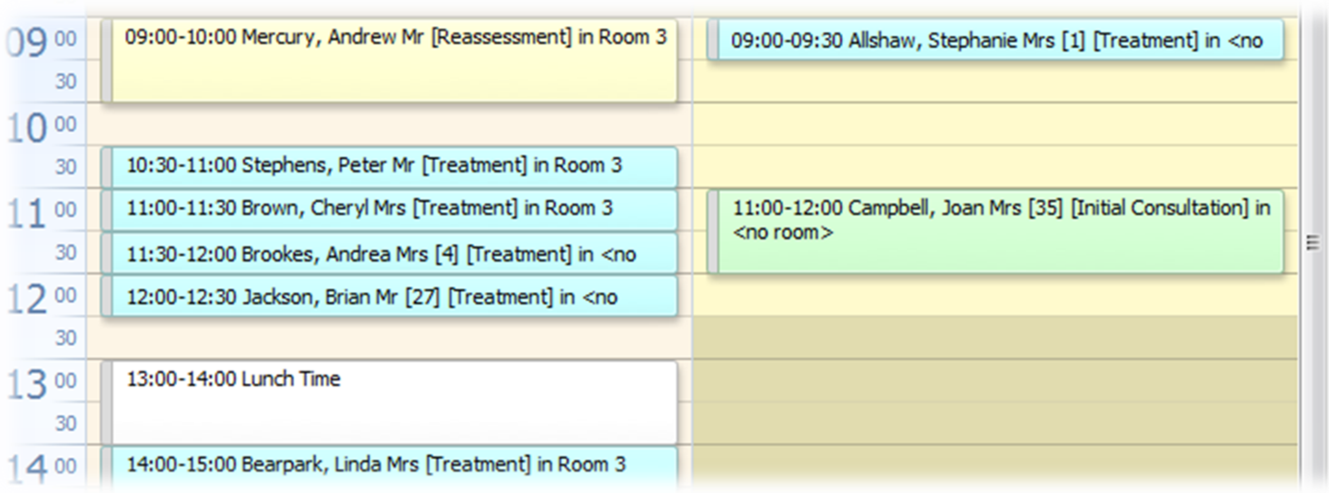


Finally, **Mrs Stephanie Allshaw** (another existing patient) calls up for a ½ hour **treatment** this Thursday, but due to her busy schedule she can only do **09:00–09:30**. As John Smith is busy, she's agrees to see Rachel Brown instead.

- Don't forget to create this appointment in Rachel Brown's diary column instead of John Smith's.
- When you go to create the appointment you will be asked if you wish to use the active patient **'Campbell, Joan Mrs [35]'**. Click **No, clear the active patient** and then search for Stephanie Allshaw instead.
- ClinicOffice may warn you that the Rachel is not the usual practitioner for this patient. Click **Keep practitioner as: Rachel Brown** to acknowledge this.

Our diary should now look something like this:-

Appointment Diary after Fourth Appointment



Moving an Appointment

A little later on, Mrs Andrea Brookes calls back (she was the first appointment we booked). She's just remembered that she can't actually make it in the afternoon, because she's having her hair done.

She apologises and asks if she can move the appointment to the morning instead – ideally at 10:30 (i.e. from 10:30 to 11:00). We inform her that John Smith is busy and she is happy to be treated by Rachel.

Here's what to do:-

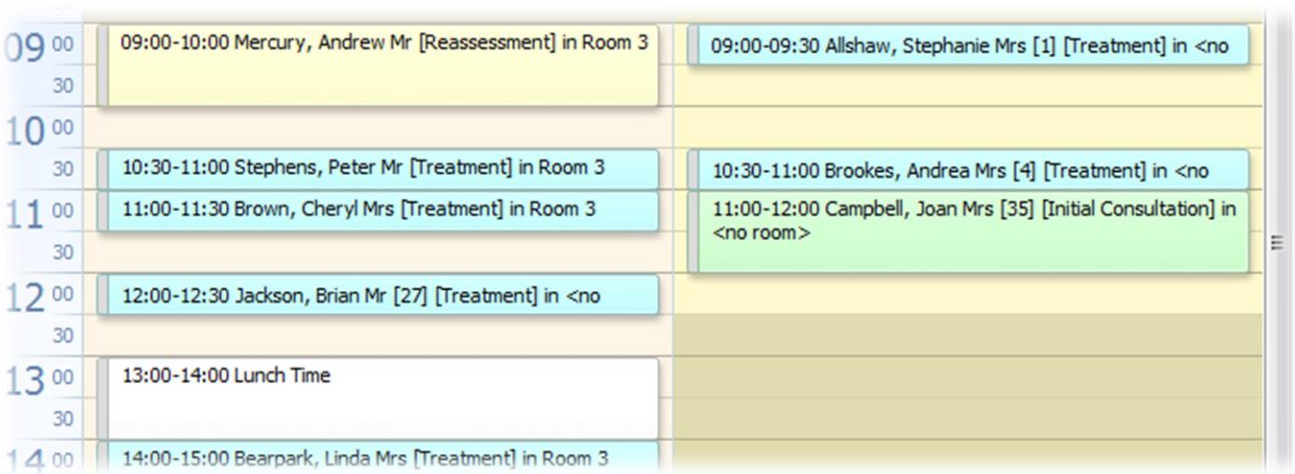
- *Click and HOLD* the left mouse button over her morning appointment.
- While *still holding* the button, move the mouse over to Rachel's diary and move it to the 10:30 slot. This will move the appointment.
- *Release* the mouse button when the appointment is in the 10:30–11:00.
- You will now see a message asking you to confirm the change of appointment. Click **YES** to confirm the move operation.

It may be a good idea to spend a little time experimenting with this. Try dragging appointments around to different time slots.

After you've finished experimenting, remember to move the appointments back to their original positions.

Here's a screenshot of what our diary should look like:-

Appointment Diary after Appointment Move



FAQ (Frequently Asked Questions) about the Diary

Q. How can I look ahead a whole week for a staff member?

A. In the staff list select only the practitioner you wish to see e.g. "**John Smith"**; remove the ticks next to the other practitioners. Under the calendar, click the link **Go To…** then select **1 week from now**.

Q. Why are some time slots a darker shade?

A. The darker shaded regions on your diary represent the hours in which a staff member is not working.

Q. What about viewing appointments according to their room?

A. To view the appointments by room click on **View appointments by Room**; this is under the calendar. You will notice that the list of staff members changes to a list of room names.

Q. Can I change the text which is displayed in the appointments?

A. Click **DIARY OPTIONS** which is in the top right. Go to the **Visual Notes** tab you will notice under **Formats** you can choose from a selection of predefined options. Each option will affect the way the text appears in different ways and areas. For example when you alter the **Caption format for room view**, this will only affect the appointments in the room view. On the other hand if you change the name format then this will affect all appointments under both staff and room views.

Using the Appointment Status

Before starting this section, please make sure that:-

- The Diary View is set to **View appointments by Staff**
- Both "John Smith" **and** "Rachel" are ticked
- We are looking at Thursday in the diary

Let's imagine that Thursday is upon us, and Mrs Stephanie Allshaw has arrived at the clinic for her 09:00 appointment with Rachel Brown.

You're at the reception desk and you know that Rachel is just in the middle of an important telephone call.

What to do?

- Right-click on Mrs Allshaw's appointment in the diary.
- Click **Appointment Status** and then click **Arrived**. This updates the status of the appointment.
- You are asked whether to send a notification to Rachel about this. Click **YES**.
- A message has just been sent to Rachel's screen to let her know that Mrs Allshaw is in the waiting room. Obviously we're still logged on as "JSMITH" (check the title bar at the top of your screen) so the message won't come to us.
- Notice that the side bar of the appointment has turned yellow, indicating that the status has changed to **Arrived**.

Now we're going to pretend to be Rachel Brown:-

- Click the **LOG OFF** button (top right of the main screen)

This takes us back to the logon screen.

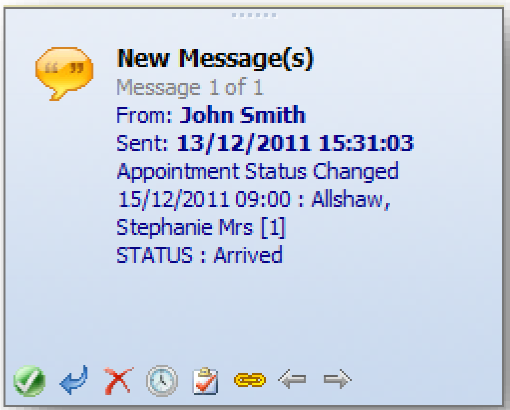
- Log on with the username "rbrown" and no password.

(If you need some help with logging on again, please refer back to the start of this tutorial.)

Now that we have logged on as Rachel Brown, you should receive the mail message which we just sent to her:-

Click the **Dismiss** button to remove the message from the screen or the **Delete** to permanently delete it.

Mail Message



You should currently be on the **Home Page**, so click **Appointment Diary** and then select this Thursday from the calendar to take us back to familiar territory.

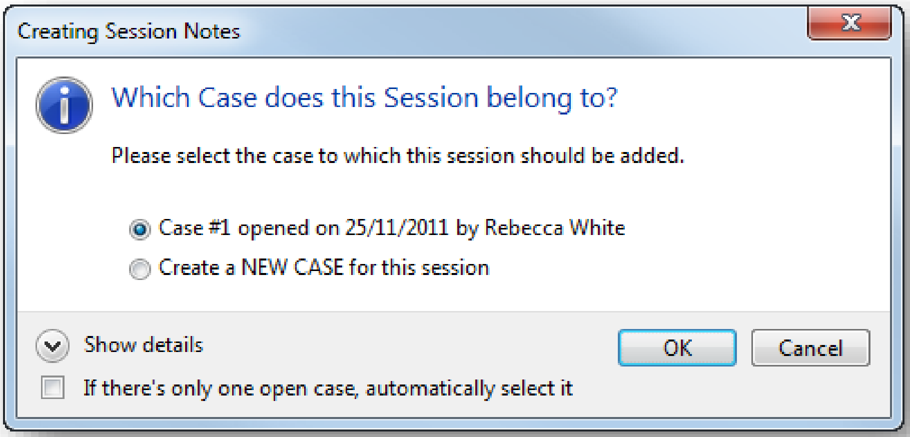
So we know Stephanie Allshaw is waiting to see us, but what do we know about her as a patient?

- Right-click on her Thursday morning appointment and then click **Open Patient Record**.
- This will display the Patient Editor with all her details – please see "The Patient Editor" section in the user guide for more detailed information on this. Suffice to say at this stage that you can peruse her patient details from here.
- You can also click the **Clinical Summary** button located on the ribbon bar of the Patient Editor. This will bring up a complete history for this patient (see "Clinical Summary" in the user guide).
- Once you've looked through, click the **"Close"** button on the Clinical History, and click the **Cancel** button on the Patient Editor to return to the diary.

OK – so Mrs Allshaw has now been treated and feels a whole lot better. What we should do now is write up some notes about the session.

- Once again, right-click on the appointment in the diary, then click on **Enter Session Notes**.
- ClinicOffice then asks you to select a case:-

Select a Case



For an explanation of cases and session please see the section "Clinical Terminology" which is located in the "Clinical Notes" section of this diary.

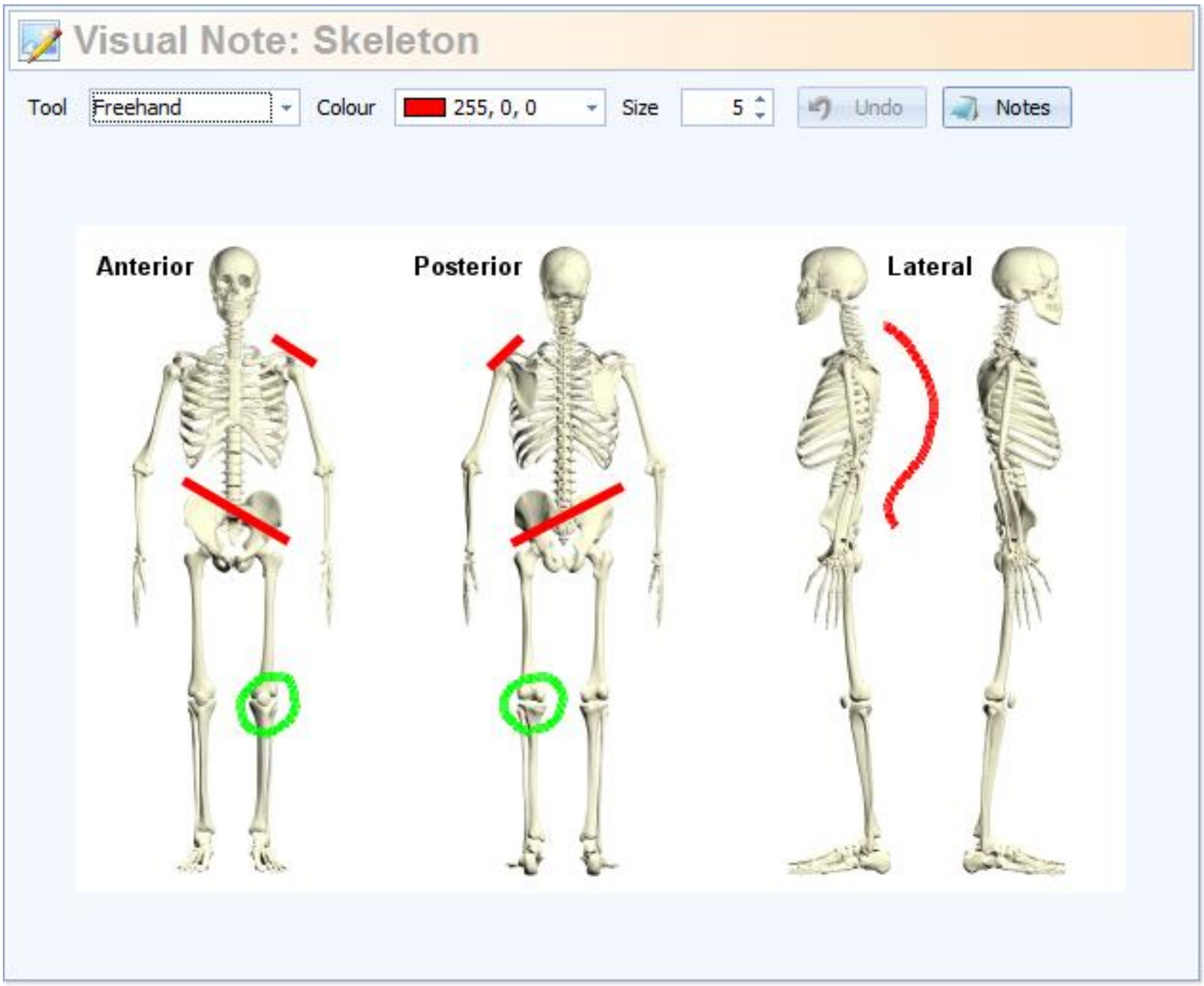
- Select **Create a NEW CASE for this session** then click **OK** to attach our new session notes to Case #2 which has just been automatically created.
- Note that most of the information (date, time, practitioner and type) is filled out automatically from the appointment record.
- Because we did so well with the treatment, set the outcome of the session to **"5) Great Improvement"**
- By default, the session editor uses SOAP notes (Subjective, Objective, Assessment and Plan) – although these tabs can be changed by simply going into the design mode. For the purpose of this tutorial just type anything you like under these notes.
- Press the **SAVE** button located on the ribbon bar.

Before closing the session record, we're going to take a look at another impressive feature of ClinicOffice v5:-

Visual Notes

- Click the **ATTACH** button which is located on the ribbon bar of the Clinical Notes Window. Now select **Visual Note**, this brings up the Visual Note Templates.
- Browse through the different visual note templates in the library, and when you find one you like, click **OK**.
- The Visual Note will now attach itself to the session you have just created. You can now edit this Visual Note with several tools you are provided with; feel free to experiment. Try the different "Tool Styles" to see what will be useful for you.

Example Visual Note Being Edited



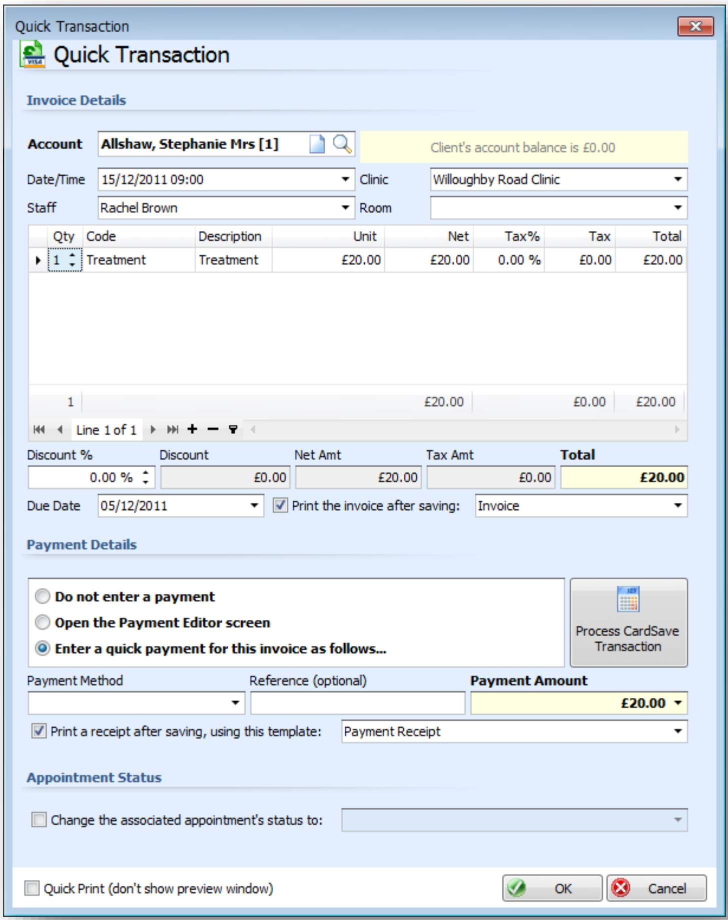
- You can add extensive notes to the Visual Note by clicking the **NOTES** button. This brings up a small separate window which will allow you to enter text in a basic format. If you close the window the text will be automatically saved, and you can view them later.
- When you have finished editing the visual note, click **SAVE** again.
- Notice that the picture now appears as an attachment to this session record. It will also appear as part of the patient's Clinical History.
- Finally, click **Save and Close** on the Clinical Notes to save all the records attached to Stephanie Allshaw. This will take you back to the Appointment Diary.

So what's next? Well, Mrs Allshaw has now been treated and is feeling much better, the session notes have been written up, so now she has come back through to reception to pay.

Creating a Quick Transaction

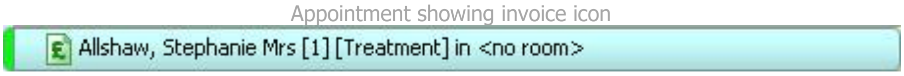
You may have noticed that so far, we have been able to do everything from the Appointment Diary screen and invoicing is no exception.

The Quick Transaction Screen



1. Right-click on Mrs Allshaw's Thursday morning appointment and then click **Quick Transaction**.
2. If you are prompted to back date the invoice, please click yes.
3. This will display the Quick Transaction editor. Notice all the fields that have been filled in for you. The details are all taken from the appointment and the cost is taken from the Appointment Type (see the "Appointment Type Editor" section in the User Guide).
4. This screen does more than just create an invoice for us. It will also allow us to enter a payment at the same time. Mrs Allshaw is paying with cash, so select **Cash** as the payment method.
5. If you wanted to print an invoice, then you will tick the "Print this invoice after saving" box and select an invoice report. You would do the same if you wanted to print a payment receipt, by selecting "Print a receipt after saving" box and selecting a Payment Receipt. For the sake of this tutorial make sure both are un-ticked.
6. The appointment with Miss Allshaw is now done and dusted; it would be a good idea to update the status of the appointment to Completed. Tick the box which says **Change the associated appointment's status to** and select **Completed**.
7. If you use the Quick Transaction a lot and each time you needed to print off an invoice or receipt, then you can tick the **Quick Print** (do not show preview window). This means that anything that needs to be printed will go straight to your printer without the need for you to look at it. This is only recommended if you are sure of what you are doing. For now leave this un-ticked.
8. Finally, clicking **OK** will bring up a summary form and clicking **YES** will return you to the diary. You will notice that there is now a small invoice icon on the appointment.

Appointment showing invoice icon



The green invoice icon indicates that the invoice has been paid. Red indicates unpaid, and orange indicates part paid.

And that's all there is to it. That one screen created the invoice and posted a payment for the invoice. It may all seem a little daunting at first, but given a little practice, you'll soon find that creating and paying invoices can literally be done in a matter of seconds.

OK – let's try entering another invoice – this time for Mrs Brooke's appointment at 10:00am with Rachel.

- Right-click on the 10:00am appointment and then click **Quick Transaction.**
- Once again, note how the invoice details have been filled out for us based on the appointment details.

- This time, rather than entering a quick payment; select the option to **Open the Payment Editor Screen**.
- Click **OK** and then **YES** to confirm the details. At this point the invoice will be saved, and the Payment Editor opens. Now we'll see how to use the Payment Editor to receive payments.

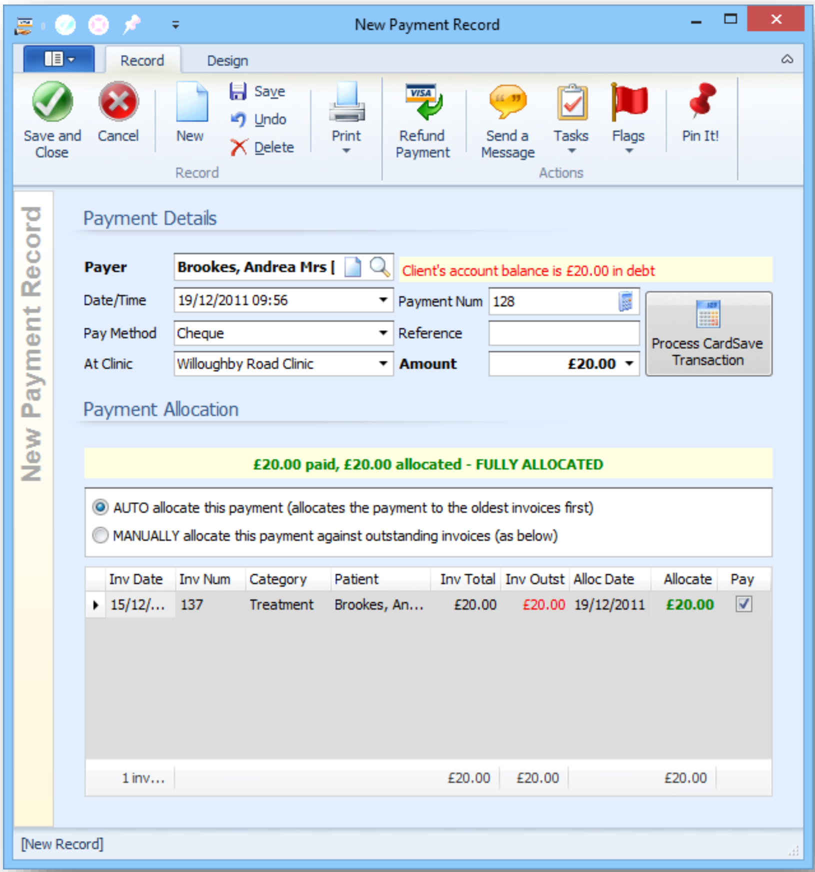
Receiving a Payment

We've created the invoice for Mrs Brookes (for £20) and she is now busy writing out a cheque to pay us.

Look at the Payment Editor window. As before, most of the fields have been automatically completed. We just need to do the following:-

- Set the Pay Method to **Cheque**.
- You could enter her cheque number as a payment reference, though there is no requirement to do so.
- Enter the amount being paid **£20**.
- We need to tell ClinicOffice how to allocate this payment (i.e. which invoices are being paid). There is only one invoice outstanding for Mrs Brookes, so ClinicOffice will automatically allocate the payment to that invoice.

The Payment Editor



We can now click 

to save this payment.

Congratulations are once again in order!

You have now completed the basic elements of the tutorial. Over the last few sections you have learnt how to:-

- Enter new staff members
- Enter new patients

- Book appointments
- Create a Session Note with a Visual Note
- Create invoices and take Payments

Please don't worry, if it all seems a bit scary at first – like most things in life – the more you do it, the easier it becomes.

The remainder of the tutorial is now aimed at consolidating what you have done and setting some exercises to work on.

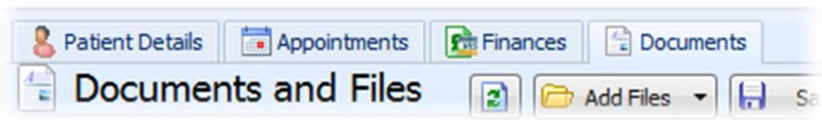
Extended Tutorial

Using Documents

So, we have the invoice to send to Mrs Campbell – now we need a covering letter to go with it. This is where the Documents feature comes in hand:-

1. From the diary, right-click on the appointment in question and select **Open Patient Record**.
2. In the Patient Editor, go to the Documents page by clicking the **DOCUMENTS** tab.

The Documents tab



You can see that there are currently no documents.

3. Click on the **PRINT** button, select **Letters** and choose **Letter to Patient** to add to her record.
4. Now press the **SAVE** button and select **Save to Database**. The letter will now appear in the Documents section of the patient's record.

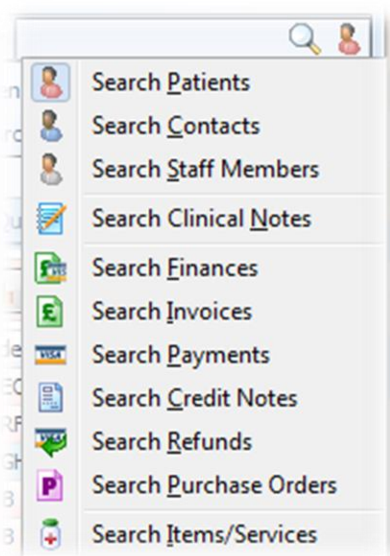
   You can create mail merge documents and then store them under the Documents section of the Patient Editor. It is also worth noting that you can now scan pictures/documents directly into ClinicOffice.

Searching for a Patient

Imagine you get a phone call from a "Mr Antonio Barratt". He is aware that he still owes money for a treatment session, and he wants to send through a cheque.

But he has forgotten exactly how much he owes:-

Searching for a Patient



1. In the top right-hand corner of the ClinicOffice screen is a Search field. Click on the button to the left of the field and then click on **Patients**.
2. Type in "Barratt" (the case does not matter) and press Enter.
3. This will take you to the Patients Search screen. If you typed it in correctly, then one record should appear which will be "Mr Antonio Barratt". (If he doesn't appear then go back to step 2). Double-click on him to bring up the Patient Editor.
4. Now go to the **FINANCES** tab on the Patient Editor. You should see that he has an unpaid invoice and the screen also tells you his overall account balance (-£20).
5. You tell Mr Barratt that he owes you £20 and he wants to pay the full amount by credit card over the phone. Notice the handy **FINANCIAL ACTIONS** link on the ribbon bar. Click that link and select **Enter Payment**.
6. The Payment Editor will open. You can now enter £20 as the amount and select Cash as Pay Method.

7. Press the **Save and Close** button.

This demonstrates how to do a simple patient search, look up their account balance and take a payment from them. There is lots of other important information on the Patient Editor; take time to look around and experiment. Remember it does not matter if you mess up the sample database.

Tutorial Summary

As stated at the outset earlier, the purpose of the tutorial is to work through some of the **basic** features of ClinicOffice v5. There is obviously far more functionality than we could possibly cover in a short tutorial.

We strongly recommend that you take the time to read the User Guide to become more familiar with the software. But the biggest key to success is simply to spend time using the ClinicOffice program.

Experiment with the sample database to see how the program best fits your needs. Simply spending time with the program is what pays the greatest dividends.

Other Helpful Resources

Full ClinicOffice User Guide: https://pioneersoftware.co.uk/files/COv5_Userguide.pdf

Support Forum: https://pioneersoftware.co.uk/forums

For telephone and online support call us on **01205 205500** and **dial 2** (requires our Support Plan).

For any sales enquiries, please call us **01205 205500** and **dial 1**.

Thanks for using ClinicOffice v5!

Kind Regards,

ClinicOffice Team