Clinic-Aid

Produced for the Endometriosis and Fertility Clinic

The Software that all nutritional therapist must have.

By Graham Mills

Contents

Introduction

Thank you for using **Clinic-Aid**. I hope that you will find this documentation easy to understand and use. My aim has been to make **Clinic-Aid** easy to use and intuitive. The documentation is to help understand the mechanics. Please use the help line to sort out any problems that you have with either the set up or use. There are possibilities of enhancing the system so if you have a request then please pass that on as a suggestion.

Clinic-Aid has been designed to work either in your clinic or to enter the data after the event. Both systems work well and have been heavily used. If you have a number of clinic locations and travel around then a laptop and portable printer may be your solution. Otherwise, you may need to print out a page or two for each client to add to the files taken to the consultation.

When you first start up **Clinic-Aid** it will set you up with the username "logon" and ask for a password. There is no password so just hit return. You will be set up with the license code page and before you can do anything you will need to enter the license code and your preferred username. In order to obtain a license code you will need to email graham@clinic-aid.com and request that a license code is emailed back to you.

The license code consists of four sets of four numbers and they have to be entered correctly before you can use **Clinic-Aid.** Once you have set up the license code you have to enter the primary username for the database. This will be created with the password of "welcome" which will have to be changed once you log in. You will also have to set up a few pieces of information into the system, this is to customise **Clinic-Aid** to you and your Company. Then it is a matter of adding information to the system. The more information you add to the system the more accurate the statistics and information will be. For example if you forget to enter a consultation with a patient then there will be no record in the system. If you wish to make use of the bank paying in facility then you must enter all cheques and cash that you want to pay in. Again this will make things easier when you come to pay into the bank and also your monthly and annual reports will be more accurate.

Good luck with using **Clinic-Aid** and I hope that it frees up your time to help more people.

FileMaker

Clinic-Aid is a series of tables with related records using the database FileMaker. Some of the things you will have to learn are linked to the way FileMaker works.

Basically information is stored in a record and each record has a series of fields. A table is a location to store a series of records of the same type, so the clients table is where all the client information is stored. Each table has a number of different layouts, these layouts display the information from the table in a different order or may display different sets of information from that table or related tables.

Another table is the clinics table, this holds information about the each clinic you have with a client. Records in this table are related to the clients table such that each record in the clinics table must have a client number associated with it. This means that when looking at a clients' history you see a list of the clinic records relating to that client.

Clinic-Aid General

There are a number of general concepts running through **Clinic-Aid**. The Home page is the centre of navigation to all tables of **ClinicAid**, clicking on a button will take you to the named table. On each table there are a number of different layouts but most of the main layouts have a number of buttons at the top of the page, these are functional and are colour coded.

Buttons

There are a variety of buttons on the client page, the use should be obvious but in case they need some explanation, here goes. Green buttons are selection buttons, there are "Find", "All", and "Sort"; the light blue buttons change tables, these are the "Home" and "Client" buttons. The red buttons are direct print buttons, such as "Envelope" or "Print". Care must be used when using the print command as this will print all selected records. "Envelope" will first select the current record and then print.

Find

One important tool within FileMaker is the find option. On most windows you will discover a Find button. Clicking that button will display an empty window. You can now set up a search on any field or fields in the window. If you were searching for a specific person in the client records you may specify their name. Perhaps they have only given you their first name and their postcode. That may be sufficient to discover the client, or even if they just gave their first name it will mean that it reduces the number to a manageable set of records. You do not have to enter the full name, the first few characters may be enough; it has to be the first characters of the field or word in that field. Once you have finished entering information you hit the return key to action the search.

On the left of the window you will see the number of records that have been found matching the criteria entered. Above that is a icon like a book, by clicking on one page or the other you can move through the records that are selected.

Sort

This button is used to sort the records in the active table, you can specify which fields you wish to sort by.

All

The All button will show all records for that table.

Home

The home button takes you back to the startup window and main navigation tool within Clinic-Aid (see fig. 1).

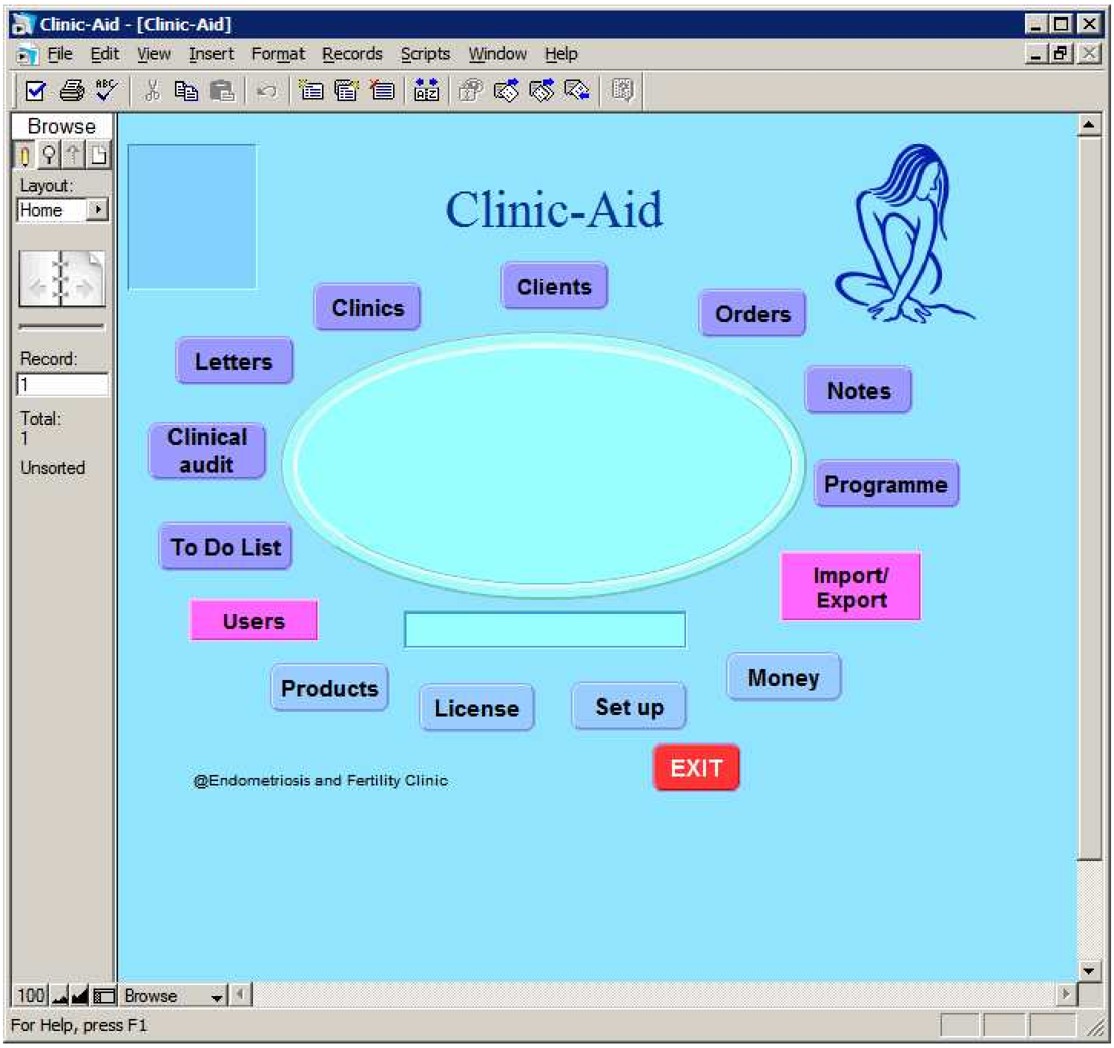


Fig. 1

Set-up

The Home page is the first window that you see after starting up **Clinic-Aid**. On the bottom of the screen, select the **set-up** layout. This will move you into the setup page where you will see a number of boxes waiting for information about you or your company, these fields are used to personalise **Clinic-Aid** for you. The information is used throughout the system, letter headings, banking details, clinic locations and times that you are available for clients to phone. You will need to complete this section as best as you can in order for **Clinic-Aid** to work correctly.

Companies

As part of the set-up stage you need to enter the details of each company that you deal with for ordering supplements or other products. A few Companies, used by the Endometriosis and Fertility Clinic, have been left for your use. For example if you use the Nutri Centre to supply your clients with supplements you need not create a Companies record for them. However, if you use supplier not existing in the list then you will need to create a new Company record. This is done by going back to the Home page. Now click on the Companies button and click on New Record. Enter all the information required in the Companies file. The information about discount levels and postage and postage limits will allow **Clinic-Aid** to predict the profit from each transaction.

However, the Companies table also can be used to write letters to specific companies keeping a track of the letter and the date it was sent. You may create a large number of companies that you deal with but they do not have to supply you with resalable products.

Products

The products file lists the various products with a code for the Company that you order that item from. You will normally order the products using the product code, this is one field in the products file. Another is the product details, this gives the name for the code and possibly the amount. There is a Company code field to indicate who this product should be bought from. A Group code is used to group various products together when you come to print off a product price sheet. The Notes field is used in the Supplement Programme sheet to give the patient some indication of why they are taking this product. A large number of products from the main suppliers should already be entered, but if there are specific items that you require that are not in the system these should be added. If items from your supplier is not available the please email graham@clinic-aid.com and we will endeavour to provide you with a product file from that company to update your **Clinic-Aid.** You can also check the web pages for additional product file downloads.

Product Groupings

This table and set of records are linked to the products table, each product has a group code and the code means that when you wish to print out a products listing it is sorted in group order and the heading of that group is obtained from the product groupings table. By filling in these records and matching products into groups you can display the list in an order that you find helpful. I have set these out by manufacturer and in some cases further divided some manufacturers' products into a number of groups. You may change the groups and group headers to suit the way that you work.

Therapists

You also need to set yourself up as a therapist with your details. For a multi user license you will be able to create a number of therapists each with a separate account.

Letters

A number of letters have already been written for specific uses. However, you will need to go through these letters and at least add a signature. You may also change the wording on these letters into your words but the function of the letter should remain.

Formats

I have left some of the printing layouts so that the formats can be amended. However, I do not recommend that you play about with the layout unless you know what you are doing and have made a backup of your system before attempting to make the changes.

Set-up

You have now set up **Clinic-Aid** for you or your Company and are ready to use the product in earnest.

Clients

This table is where all the information about the client is stored, the clients name, address and a variety of other details may be supplied. Remember you need to register your Company with the Data Protection agency – beware there are agencies who contact you on behalf of the Data Protection agency and charge you a premium rate.

There are three client views, the main **Client** (see fig. 2) view is where all the client information is entered. The **History** (see fig 3) view gives information on where and when you saw the client, any orders they placed, their clinical audit scores, record of correspondence, and the list of online supplement programmes. The **Details** (see fig 4) view gives some information from the history page but also has the pregnancy details and the Food Intolerance results.

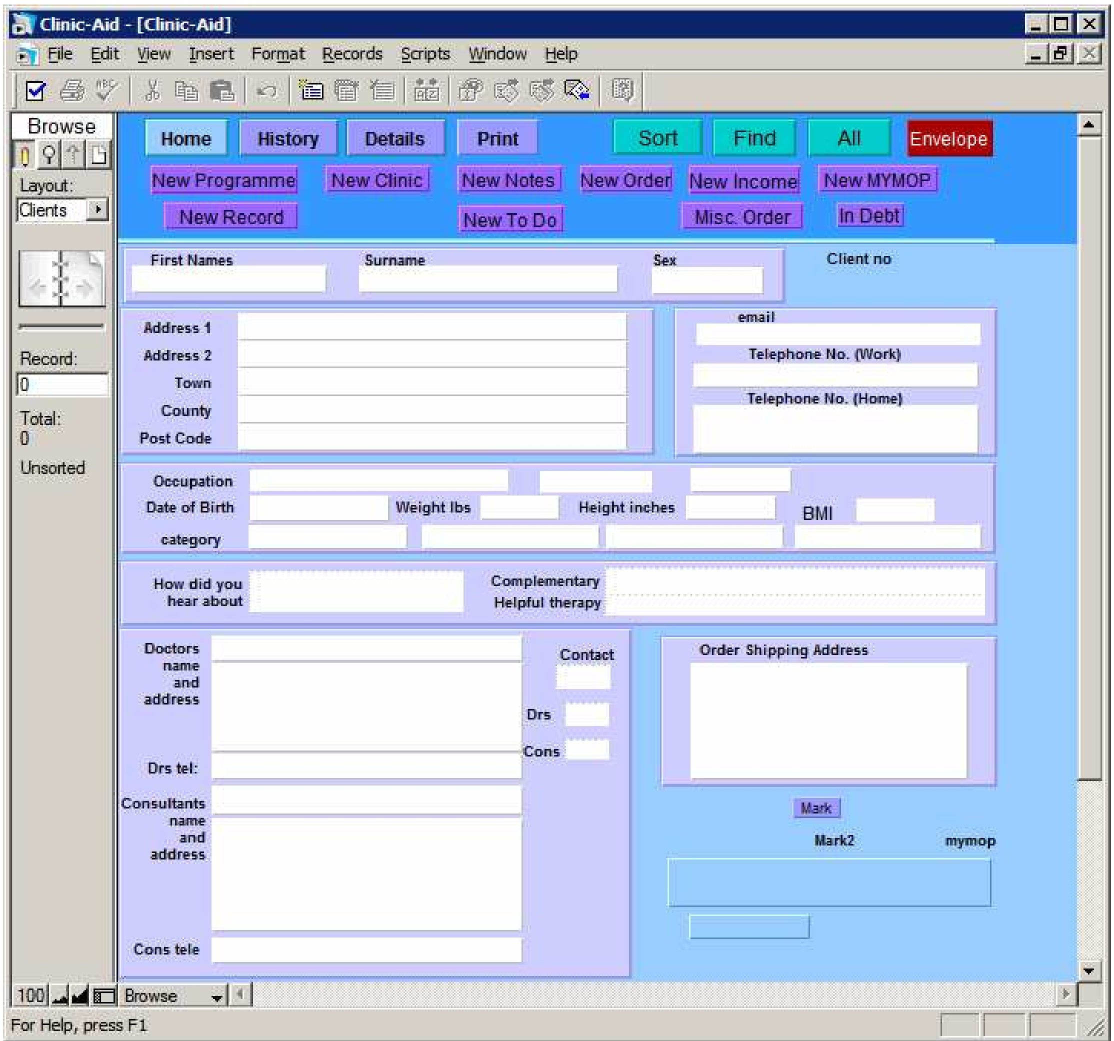


Fig. 2

Creating a New Client

From the Home page click on the Clients button and to create your first client click the New Record button. A blank new record will appear, ready for you to fill in the details. Make sure that you are in the “client” page rather than the “history” page, you will see the address fields if you are in the correct layout. If you are in the wrong layout then click the “Client” button. The cursor starts at the clients first name and you can enter the information and a tab will take you to the next field. The height and weight fields can be given in either lbs and inches or kilo’s and metres but not mixed. The clients Body Mass Index is then displayed in the box.

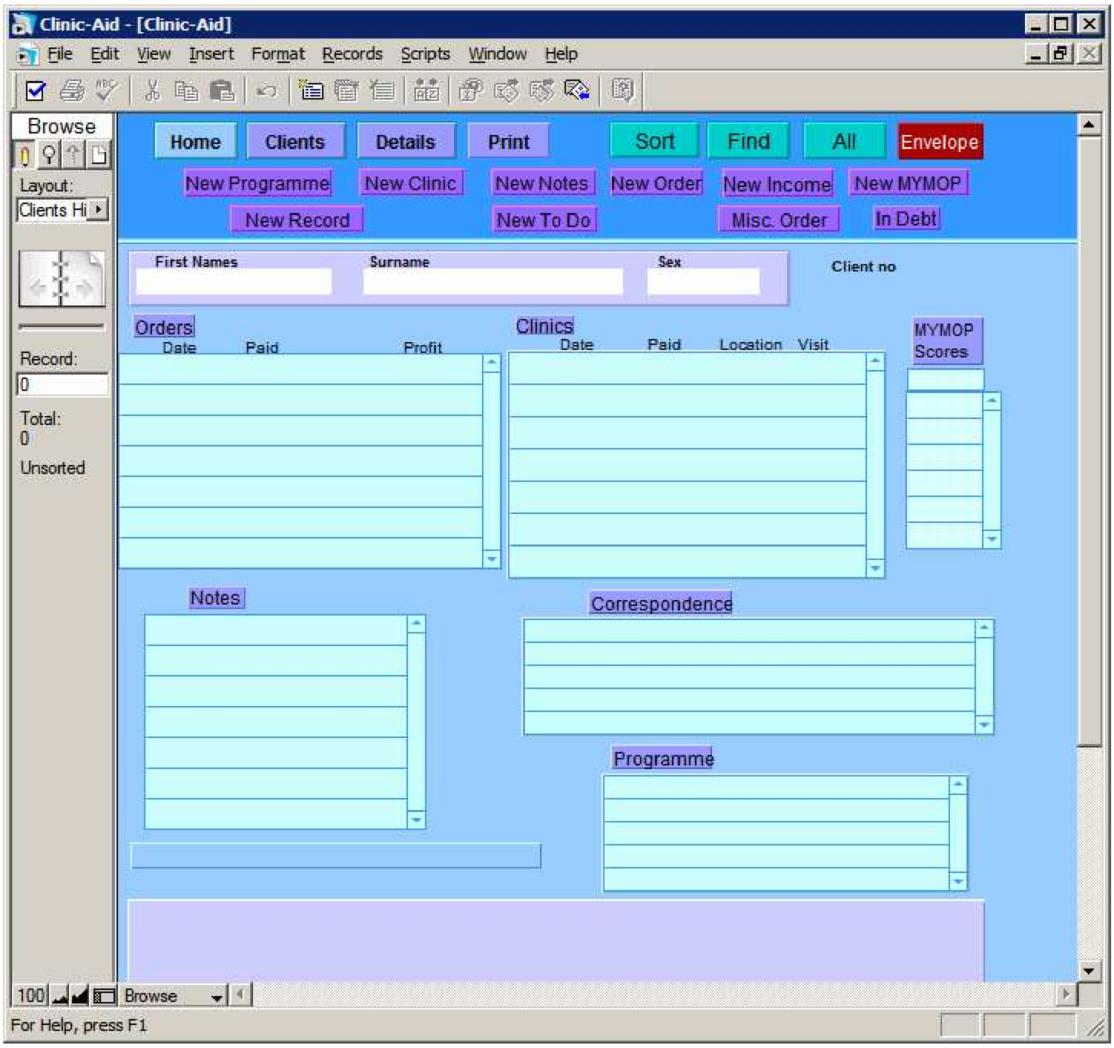


Fig. 3

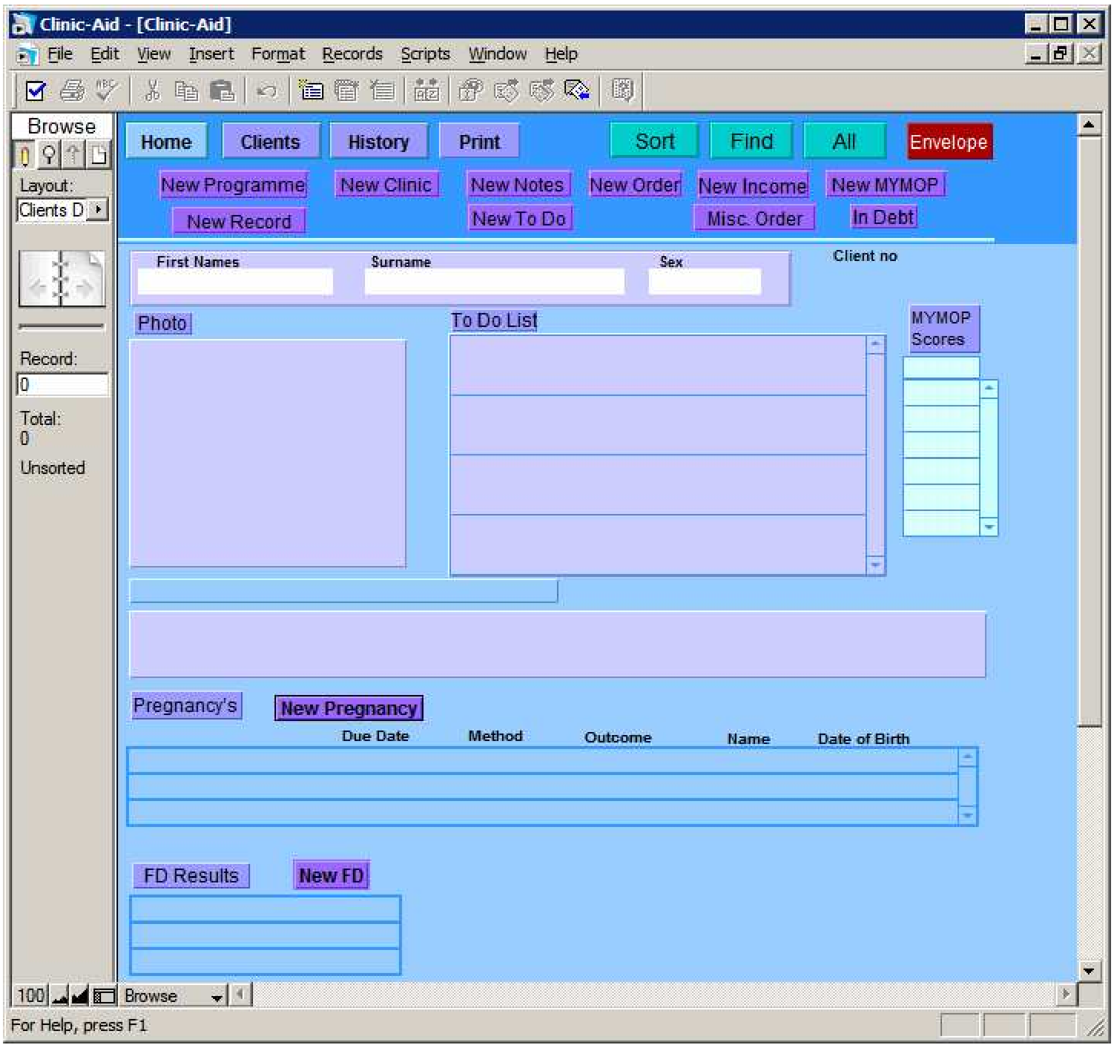


Fig. 4

There are four category fields, these can be used for any symptom or condition. Basically there use is to be able to select a group of clients with specific symptoms so that you could inform them of a new treatment or event that they may find useful. For example, the software was developed for the Endometriosis and Fertility Clinic, so if there was a talk on Endometriosis in the Lincoln area clients could be chosen who have endometriosis and who have an address in the Lincoln postcode area. These people could then be sent a letter informing them of the event.

The patients Dr's name and address fields are used when writing a letter to the patients' doctor, informing them of the treatment you are suggesting to his patient and possibly indicate some test that you think may be beneficial to the patient. Similarly the patient's consultant's details can be entered and letters sent to them.

The shipping address is used for those patients who may have difficulty accepting delivery of parcels at their home address and wish that these products are sent to their work address or possibly friends or mothers address.

Changing details

Details of a client can change, they get married and change their name of move house and change their address. These can be done very easily by just selecting or finding the client concerned and changing the contents of the particular field. Please be aware that when there is a change of name you then cannot see what the name used to be. This can cause difficulties if you try and search with the previous name as you will not find the client, unless you routinely put that information in the comments field and then search in that area for the name. Another option is to search for the name in the clinics table and then get to the client page from there.

Print

This button allows you to write a letter either to the client or to the client’s doctor or to the client’s consultant. It directs you to the print layout page in the clients file. Beware with most print options you must ensure that you have selected only the clients you wish the letter to go to. It is unlikely that you would send the same letter to a number of client doctors but the facility does allow this so be sure that you select just the clients that the letter is intended for. A list of clients is shown in the window provided.

Clicking on new letter opens the Letter file and moves you into that section.

Clinic

The Clinic file or table holds all the information about specific clinics. The client name and client reference number is usually obtained from the client record, so is the visit number. Basically all that is required is the location of the clinic, the date and time of the appointment and the amount due or paid for the clinic.

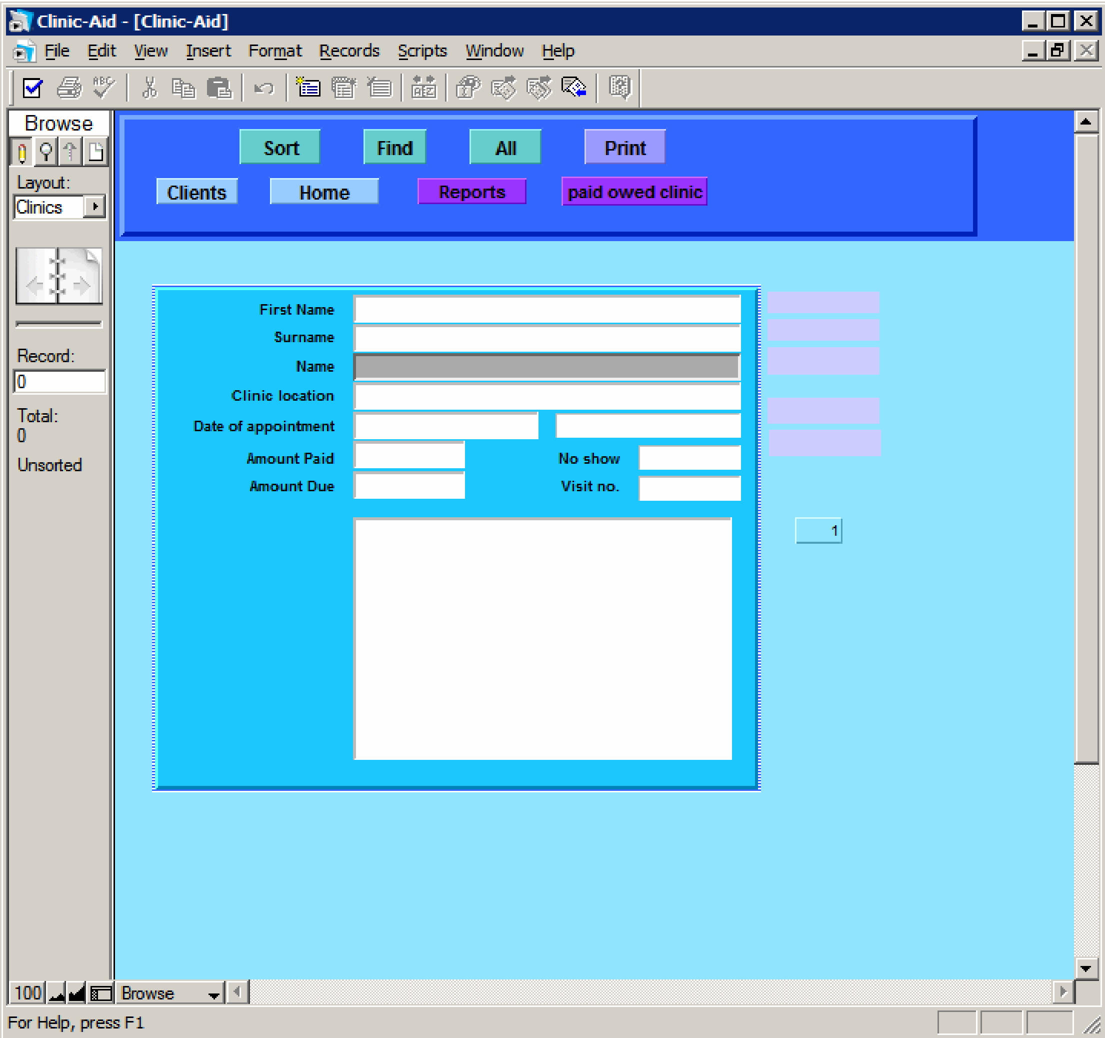


Fig. 5

Buttons

There are a few buttons within the clinic main layout, the find and all buttons work as described for finding specific records. For example you may wish to select all records in a specific month. Click the find button and enter the month and year you require and hit return. You could now click the report button to get a breakdown of who you saw over that month. You may wish to select the clinic location then you get a report of the clients and dates you saw at a particular clinic. This can be useful if the clinic charges are based on clients seen, rather than a flat rent.

Print.

The print button works in a similar way to the Print option under clients. However, it is more likely that the letters you wish to send from the clinic file relates to money that is owed on a previous clinic or you may want to send the client a receipt. These letter have been suggested and it should be a case of selecting the letter type and printing. The date and letter number are recorded for the client so you have a record of all letters sent to each client.

Accounts

It is recommended that at least once a month you search for those people who owe you money for a clinic and print specific letters to those people regarding their account. There are a number of letters predefined for this use.

Notes

During your consultations you may take notes and if this is in electronic form, either a word document or a picture, in which case you may want to store those notes in the database linked to the client and the specific clinic. This can be done using the Notes table and each record can store up to three documents and there is also some space for additional notes. Any of the three notes areas can be printed.

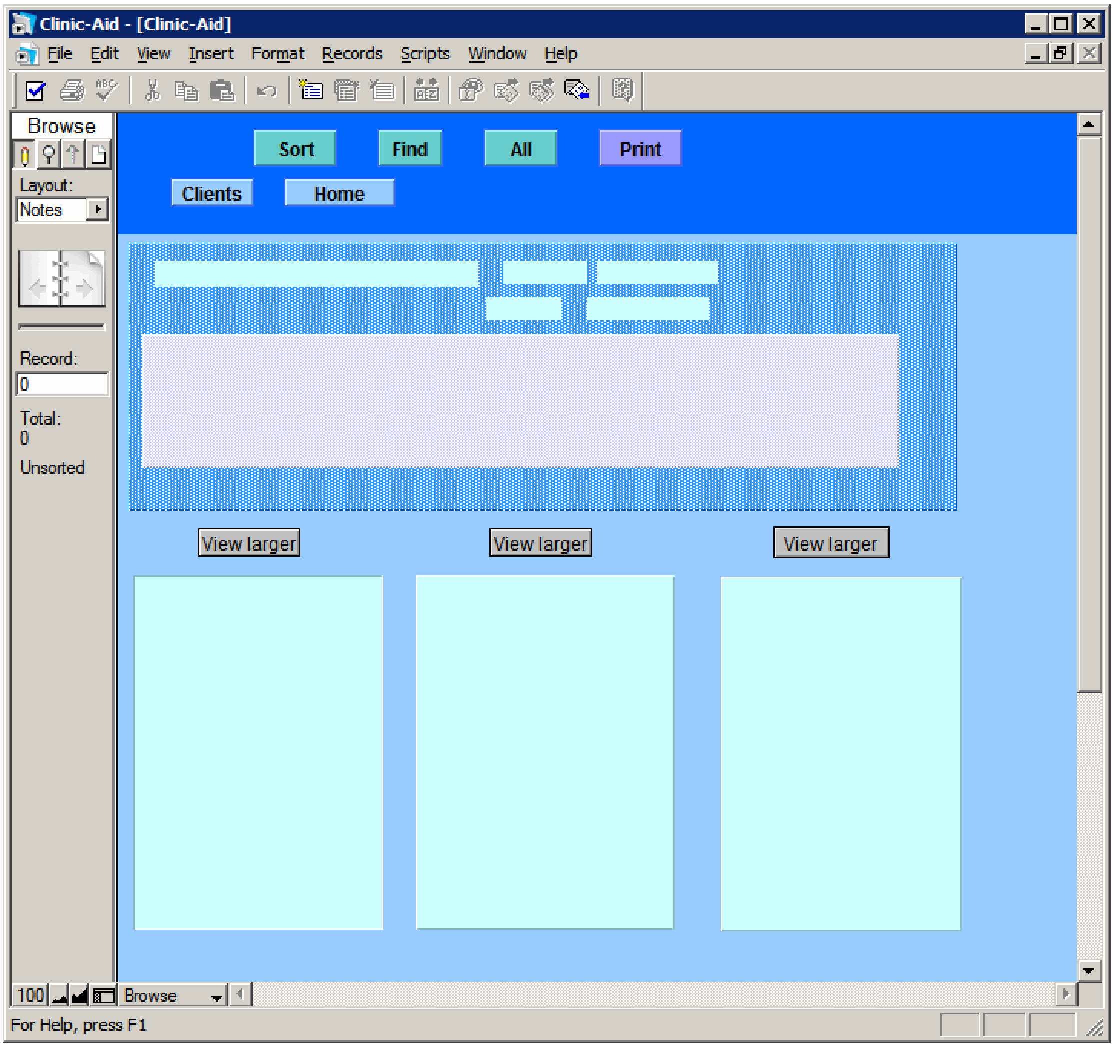


Fig. 6

Orders

The Orders file or table is used to record the client orders. You recommend a series of supplements or products for your clients to use and you may wish to order these products for your clients. The easiest option is to work with a supplier such that you place the order and the supplier bills you on a monthly invoice and sends the supplements direct to the client. You can then charge the client the retail price and get a trade discount from the supplier. The amount of discount will probably depend on the amount of business that you do with the supplier but you should expect at least a 20% discount but will be expected to pay postage on any order less then a specific amount. You may wish to pass some of this discount back to the client on higher orders. This can be done by specifying charges and discounts that the company gives you in the Companies file.

Remember that you have to encourage your clients to use your services but you also need to make some money from the transactions. Giving a discount to your clients ensures client loyalty and it may stop them from going out and buying inferior products from high street health food stores.

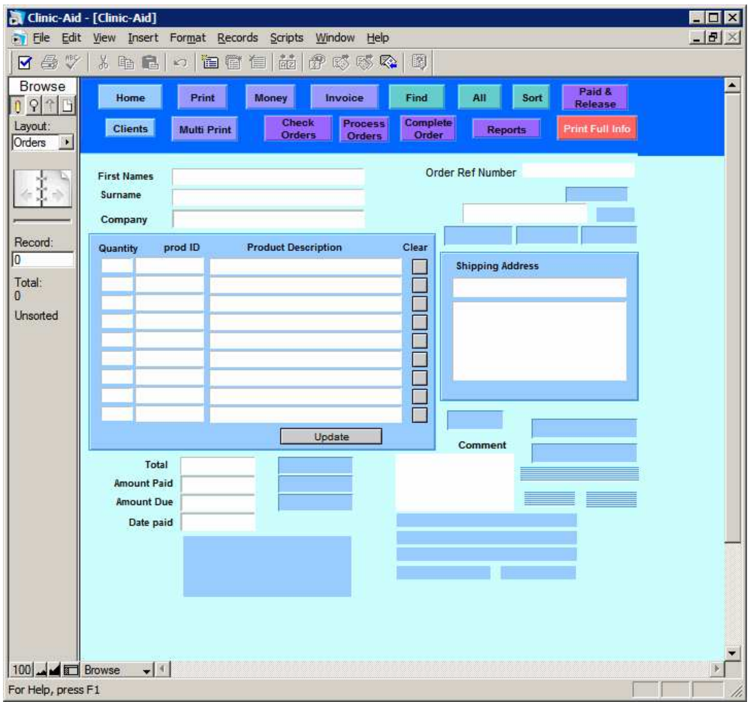


Fig. 7

New Order

Normally a new order record will be created directly from the client record or from a client programme. This means that information about the client is automatically entered. If it is from the client record then you will be expected to enter the company to order from and the product code for each order item. You will need to check that the address to send the items is correct and enter the amount the client has paid or the amount that is due. Note that the default for the layout is that the order is placed on hold (wait state) until the order has been paid. This can be overridden by changing the state to “no”.

Check Orders

This button executes a script which checks the state of all orders and the computer will speak out the number of orders in wait state plus the number of orders awaiting processing for each company. However, the script can only give details for five companies. Once some companies have been processed then details on those companies will be given. Please note that the speech option is only available in the Mac versions the information is also displayed on screen.

Process Orders

The Process Orders button is used to process the order for a Company. It will choose the company by the first order it finds waiting to be processed. All the orders for that company are then printed out, three orders to a page, and a flag is then set up reminding you that you are in the middle of the ordering process. You should not do anything else with the orders until the order has been checked, basically ensure that the printing process has worked before clicking the Complete Order button. If the printer fails then it is easy to process the order again and print again. The print out can then be faxed to your supplier and filed in your order folder. This means that you have a hard copy record of all orders placed as well as a computer list.

Complete Order

This button is used to run the script to complete the order process. It changes the state of the orders into yes and sets the date, time and address field for the order. The Process Order Complete Order sequence can then be repeated until all company orders have been completed.

Invoices

You will receive invoices from your supplier, it helps if you click on the invoices button and enter the details on the appropriate order. This becomes useful if a client complains about not receiving an order, if you have received an invoice it indicates that the supplier has shipped the products and you also have the invoice number to refer back to the supplier. It also means that you have a separate record of invoices received and if you have a bill from the supplier, which includes an invoice you have not received you can raise a question.

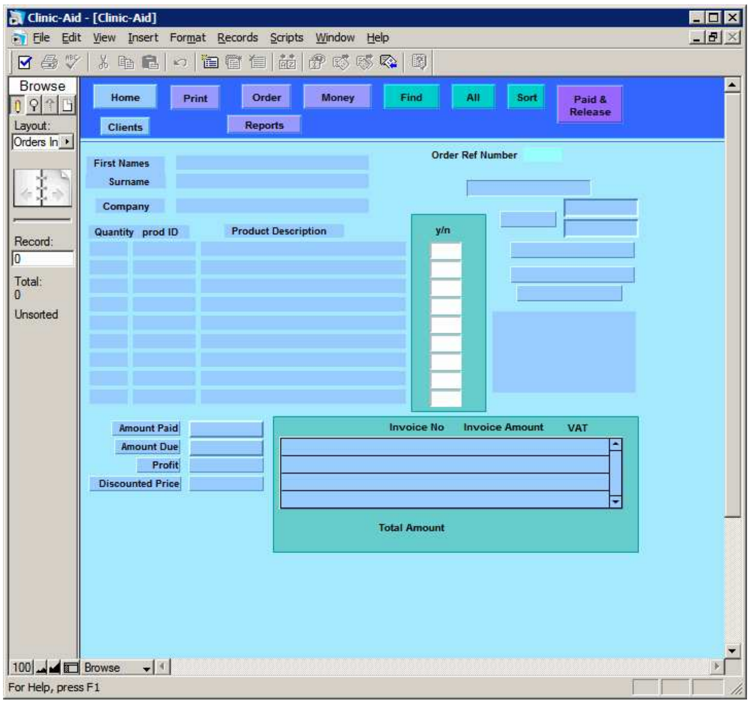


Fig. 8

Money

The money layout shows a breakdown of the order with the recommended retail price of the product.

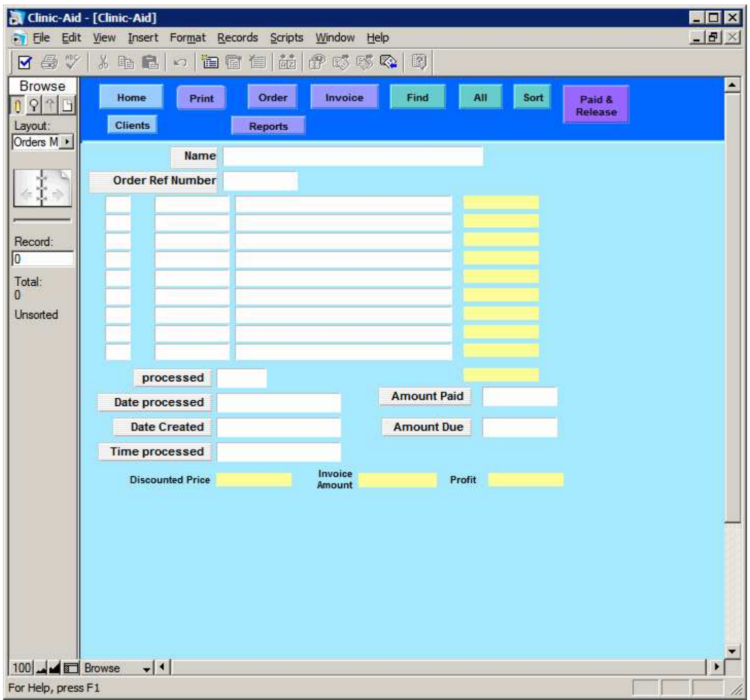
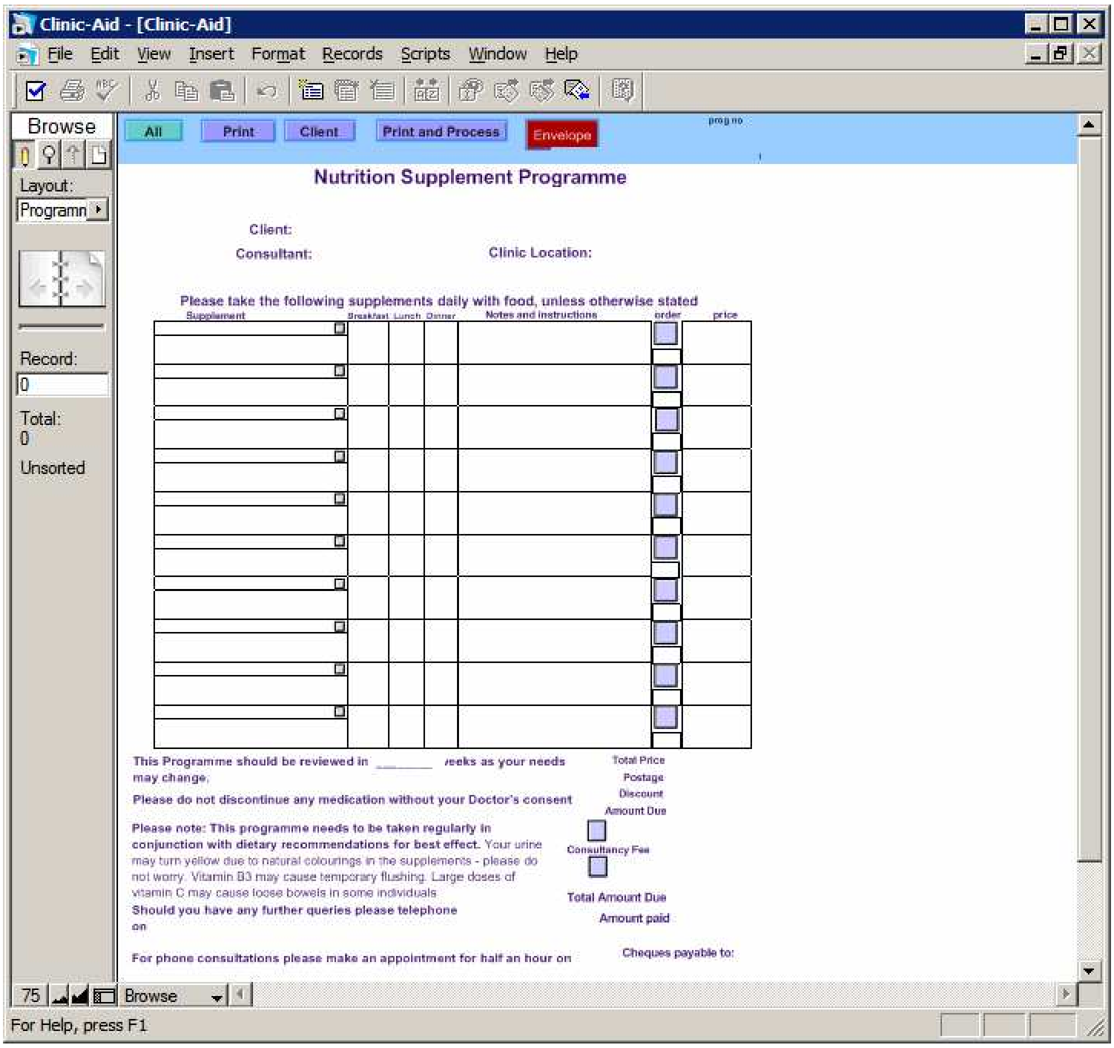


Fig. 9

Supplement Programme

This page can be used and processed to create a clinic record as well as a number of order records. Two copies should be printed out, one for the client and one for your records. Basically, all you need to enter is the supplement code and the times and amount the client should take. The notes are entered from the product table notes field, there is a button to click if the patient wishes to order the product, click the button to order once, again for two pots etc, if you over click the number will switch from a quantity of 4 back to zero. The default for the clinic location is phone but if different you will need to change the form. If an error is made and the wrong supplement is typed in the only sure way to ensure the correct item and costs are applied is to click on the small button near next to the code field. This will clear all fields ready for the correction. If you do not clear the entry in this manner you will probably maintain the cost of the item entered in error. Once the form has been completed and finalised with the consultancy charge it is ready for processing and printing. If you are with a client it may be easier to just print off one copy of the form now, for the client and process and print off the second copy at a later stage.

The processing will generate records in the clinic table and a number of order records. It depends on the products ordered as to how many orders are generated, one for each company from the product list. For example if you order product code a1 from company A and product code b2 from company B and the supplement programme shows an order for products a1 and b2 then two orders will be generated one for company A and a second for company B. The system will work for up to five companies ordered from one supplement programme form. In practice it would be cheaper and preferable to reduce the number of companies you order from anyway. The orders would then be processed in a normal way. If two companies or more are being ordered from the money for each order is split proportionally to the amount of each order. For example if the order is for 7 items and 1 of those items is from a different company, the client may be due a discount because of the total spend. The proportion paid to each order is a fraction of the total amount paid based on the product price, this will mean that the profit for the one item to a second company may be very low, especially if postage is added, however, the total package will give a profit, if not then you should review your setup page and adjust the discount levels and go to the company record and increase the charges for postage.


Clinic-Aid - [Clinic-Aid]
File Edit View Insert Format Records Scripts Window Help
Browse
Layout:
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0
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Client:
Consultant:
Clinic Location:
Please take the following supplements daily with food, unless otherwise stated
Supplement
Breakfast
Lunch
Dinner
Notes and instructions
order
price
This Programme should be reviewed in
/eeks as your needs may change.
Please do not discontinue any medication without your Doctor's consent
Please note: This programme needs to be taken regularly in conjunction with dietary recommendations for best effect. Your urine may turn yellow due to natural colourings in the supplements - please do not worry. Vitamin B3 may cause temporary flushing. Large doses of vitamin C may cause loose bowels in some individuals
Should you have any further queries please telephone
on
For phone consultations please make an appointment for half an hour on
Total Price
Postage
Discount
Amount Due
Consultancy Fee
Total Amount Due
Amount paid
Cheques payable to:
75
Browse
For Help, press F1
Fig. 10

Finance

There are a number of windows and tables that can be loosely contained under a finance section. Although many of the main tables have an income or receipt creation activity, this section describes the windows and tables that hold the information and what you need to do to manage your accounts.

Income

There are two main functions for these records, one is the weekly bank paying in details and secondly the monthly or annual reports for the auditors. By filling in a record for each payment you also have a searchable confirmation of payments by clients so you can confirm cheques that have been cashed.

You can also use this to check and reconcile any credit card payments, by using the find button to select the credit card payments and the period you are looking to reconcile. You need to ensure that the records are sorted in date order and you can display the report using the Daily Report button

Reports

There are a number of tables that have monthly or yearly reports. These help to monitor your business and see how your business is growing

Receipts

By recording your receipts under specific categories you then are able to produce monthly reports that can be used to help understand your business. This also helps at year end when preparing information for your auditor or just doing your annual returns.

Weekly Paying In list

When you receive any income from a client you should go to the client record for that client and click the “income” button. That will create a new income record for that client and all you have to enter is the amount and type of payment. For type that means cheque, cash, bank transfer etc. this is a list option. For payments that happen automatically like bank transfers or credit card payments you also need to set the ?? field to “done” so that the record is not included in the next bank payment statement. For credit card payment, I have created a button, so once you have entered the amount and tabbed out of the window then just click on the credit card button to complete the process.

When you come to make your bank payment by clicking the “Bank Payment” button a list will be produced for your bank of the paying in details giving totals etc. You will have to check the cash and make sure that it matches the amount on the list and work out the number of each denomination, it is also worth counting the cheques and ensuring that they match the list, in case you have double entered or forgot to enter a particular cheque. I suggest that you print out two copies of the paying in details, one for the bank and another for your files. If you decide not to go to the bank you can click the reset button and the records get reset as if they have not been paid in. However, once you have gone to the bank you must use the confirm button to confirm the action and mark those incomes to that bank income.

Expenses

The expenses page is a new addition to **Clinic-Aid** and was introduced to make paying for petty cash items and travelling expenses easier for the accountant and makes entering receipts easier.

To Do List

Often there are a variety of requests or actions that clients may ask you to do for them. It can be difficult keeping track and monitoring these requests and you need to ensure that if your client has asked for some information and you have agreed to do it then it can reflect badly on the service if the request is just lost down a black hole. Of course this can still happen but if these requests are entered on the 'to do' list, then you can keep track of them. If you need to do something for a particular patient then find that patient and use the button labelled 'New To Do' and enter the action. Each entry has a priority of either high, medium, or low, a status value, a percentage done field, a due date and a completion date, as well as the action to be done, the reason for the action and a comment field.

Under the individual client, under the details layout, you will see a link to the actions performed for that client with a summary of the action.

There is only one table of 'to do' items but normally in a multi user environment you will only see the actions allocated to you, however, it is possible to see all actions and to reallocate a particular action to another user. If the action required is not going to be received by the client then it is common courtesy to contact the client informing them that the work has been done.

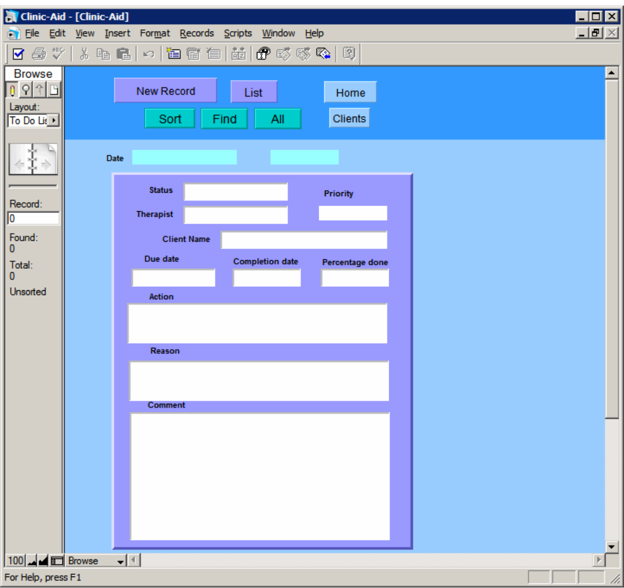

Fig. 11

Reports for research

In order to record various tests and other information extra tables have been set up to record specific tests that have been routinely undertaken. We then export this information into a spreadsheet or other package to analyse. These tables have been specifically designed and set up for the Endometriosis and Fertility Clinic, other tests and tables can be added. If they are of a general nature then it may be quite cheap to add; if it is a complicated page and unlikely to be of general use it may be more expensive to produce.

Pregnancy

Often it is useful to record and report on patients' pregnancies and outcomes. This page allows you to record details on each pregnancy, when it was reported, due date, date of birth, name of child, weight of child at birth and a comment field for other items, like miscarriage or abnormality. Then impress your client is asking after little (or not so little) Jimmy.

Food Intolerance Test

At the Endometriosis and Fertility Clinic we have used the Cambridge Nutritional Sciences Ltd food intolerance test. This tests 59 foods in 46 IgG reactive food wells. The results can be recorded and exported looking for patterns with specific conditions or what eve r research you are undertaking.

Clinical Audit

This determines the effectiveness of your treatments and gives a client oriented measurement of treatment outcome. The method used in **Clinic-Aid** is based on the MYMOP2 system (Measure Yourself Medical Outcome Program). Clients are given an initial questionnaire asking about two of their symptoms, an activity they do and their wellbeing. After subsequent visits they are asked to score against the same symptoms and activities.

Clinic-Aid uses two tables and two questionnaires to handle this information. The MYMOP1 table is the initial questionnaire and apart from asking questions about their symptoms and scores asks about duration of condition, medication they are using, if they have used nutritional supplements and what foods they are excluding from their diet.

The MYMOP2 table is for the follow up questionnaire, a blank questionnaire should be printed off before you see your clients if you do not have access to your computer at your clinic. This has basically the same questionnaire but the symptoms and activity is taken from their MYMOP1 table and the client produces a new score for those symptoms, activity, and sense of well-being. These scores are averaged and you have a quick look to see if the client has improved.

Misc. Orders

You may sell products or services to people who are not yet full clients, for example the Endometriosis and Fertility Clinic sells Dian's books. However, you do want to be able to account for those books and hold a record of that persons name and address as this may be useful in future promotions. The Misc. Order table is used to record these sales and the peoples' names and addresses. There are also facilities to write them standard client letters and to produce reports. You specify the list of items that you can sell in the Setup area.

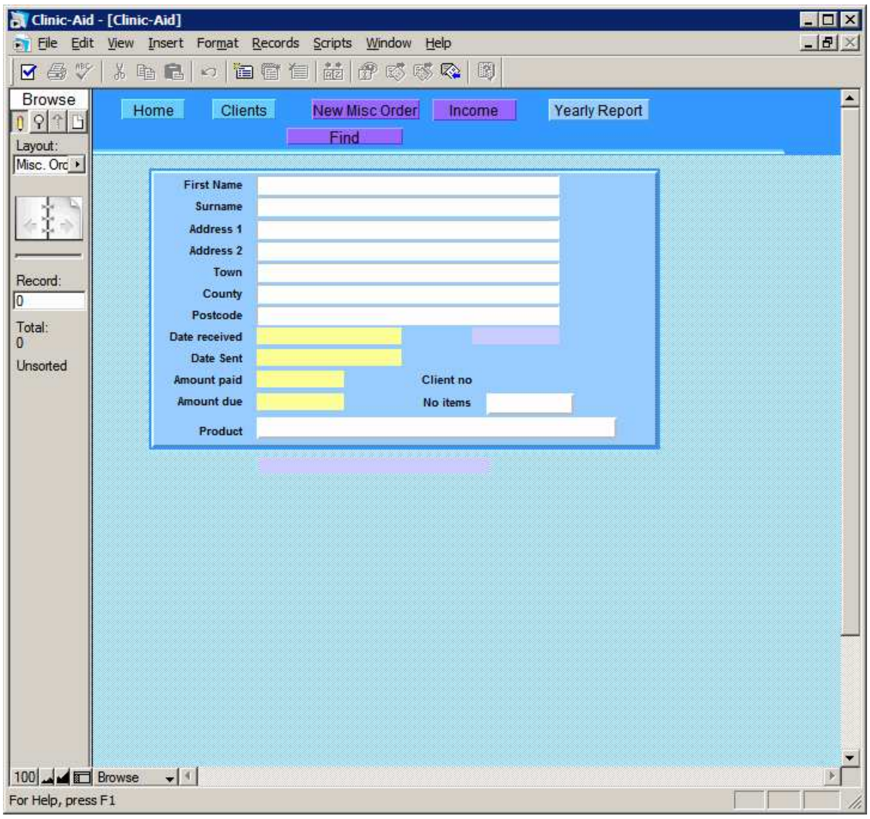

Fig. 12