ClinicOffice

Web User Guide

Introduction to ClinicOffice Web

The ClinicOffice Web edition is a slimmed down edition of ClinicOffice designed for a web page. This means that you do not have access to the more advance features of the main Local Install or Hosted based editions, however, there is still much that you can do with it, plus the advantage is that you can access it from any internet browsers on any device, including mobiles phones.

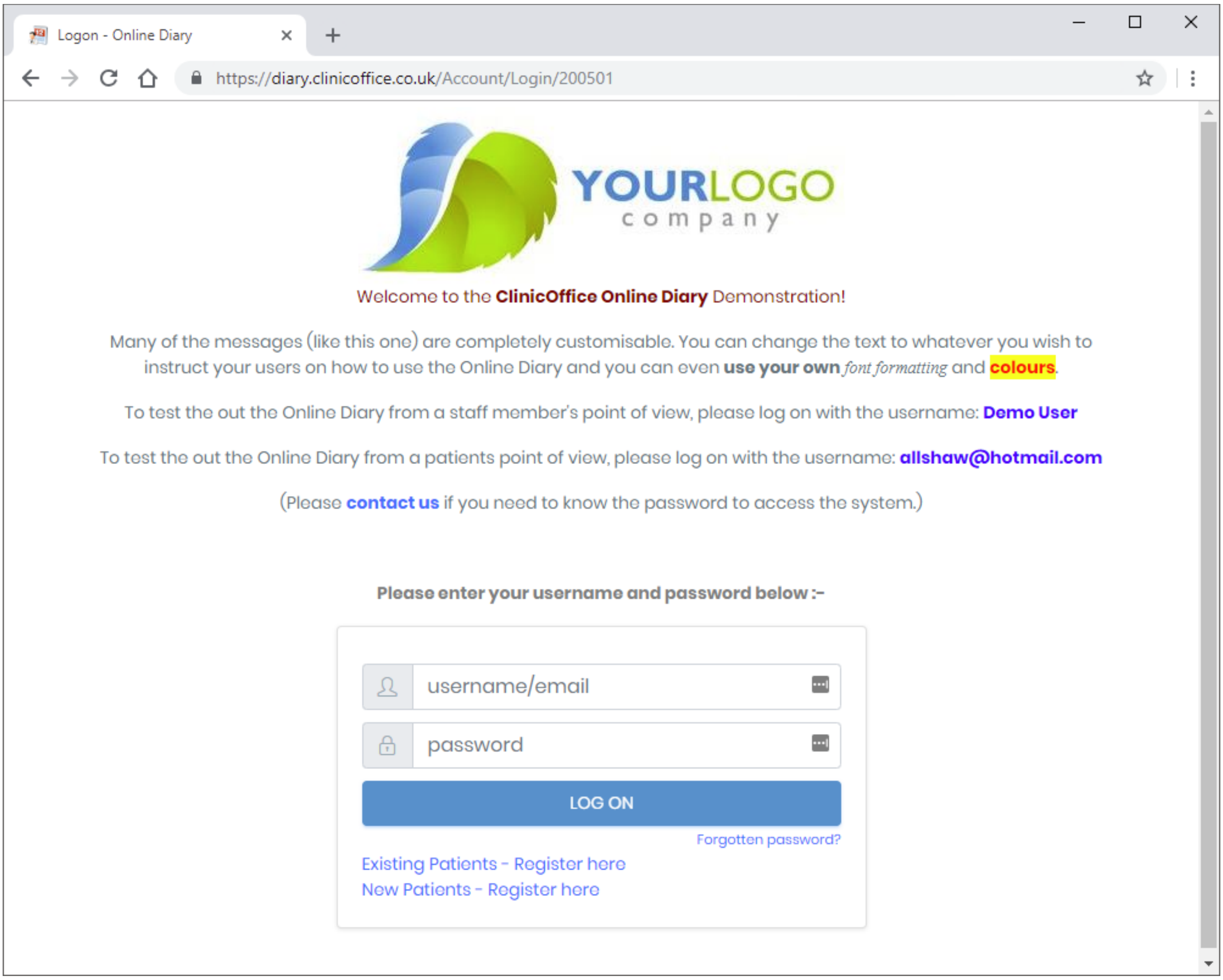
The main features of ClinicOffice Web are: -

1. Staff diary
2. Patient information, their appointments, finances, documents, and journal logs
3. Clinical notes and summary
4. Contact information, their appointments, documents and journal logs
5. Staff information, documents, working hours and access rights

Logging On to ClinicOffice Web

ClinicOffice Web uses the same username and password as ClinicOffice.

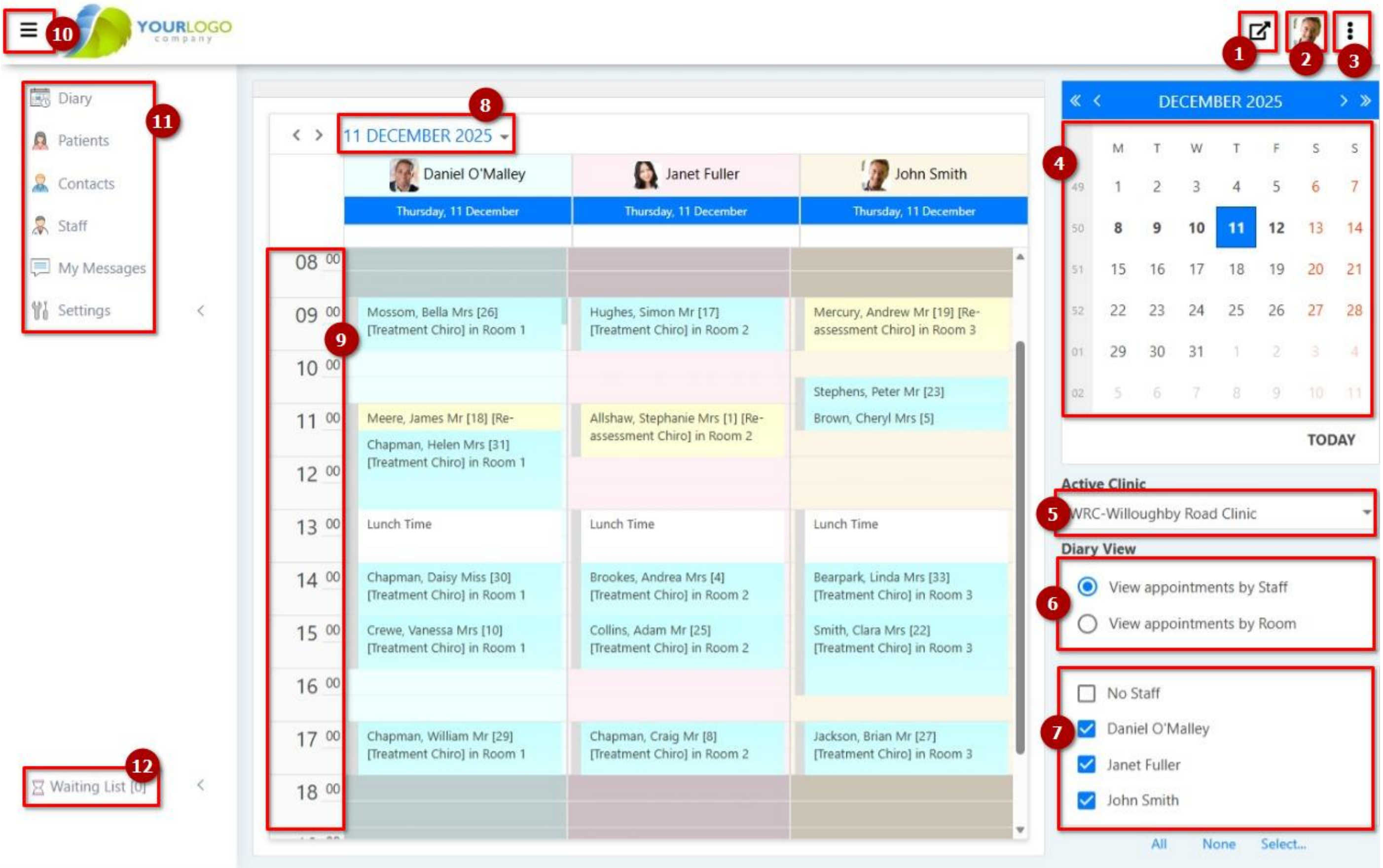
- Enter your username and password into the two boxes as pictured below.
- Click the **Logon On** button to Logon to the web edition of ClinicOffice



The logo is customisable so you can personalise the service for your clinic. Additionally, the options for 'Existing Patients' and 'New Patients' to register can be toggled on and off in the admin settings section.

Staff Diary

After logging in, the Staff Diary page will load.



(see image ABOVE for corresponding numbers)

[1] 'Clone in New Tab' opens a copy of the current page into a new tab on your browser.

[2] Here you can view your staff profile, change your password and logout.

[3] Use this control to hide or show the diary navgiator sidebar on the right hand

[4] The 'Diary Navigator' allows you to select a different day on the diary screen. Simply click the day you want to view and the diary will reload.

[5] The 'Active Clinic' allows you to change to different clinics you have in your ClinicOffice database.

[6] Here you can view appointments either by staff or room columns.

[7] Select which staff members to view in the diary. (In Room View, you will have a selection of rooms instead)

[8] This is another way you can navigate between different days. This can be used instead of the right-hand sidebar navigator and is useful for small screens such as mobile devices.

[9] The 'Time Ruler' displays the time slots for the diary. Right-Clicking the ruler will give you options for changing the diary intervals (i.e. how long each slot on the diary is; 10 minutes, 15 minutes etc).

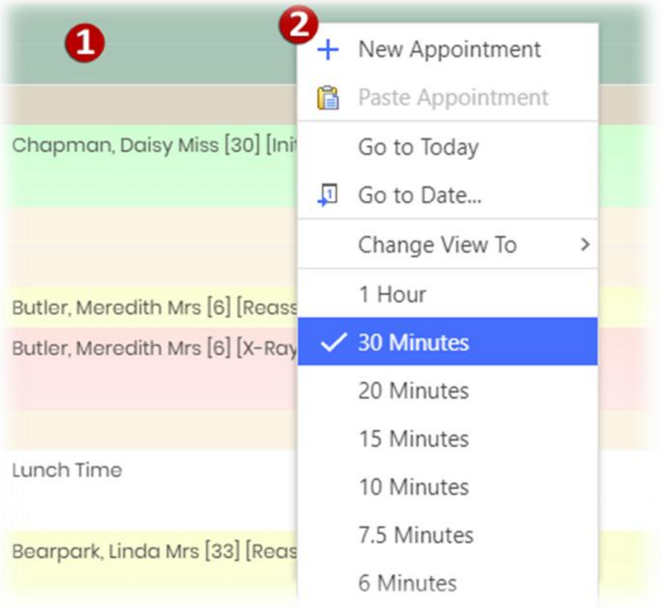
[10] Use this control to hide or show the text for the left-hand sidebar controls

[11] From this sidebar you can navigate between the Diary, Patients grid, Contacts grid, Staff grid, your internal Messages and Settings (includes Admin Settings, Diary Options, Custom Messages and Working Hours).

[12] Displays those that are on the waiting list and allows you to add people to this as well.

Creating, Moving and Opening Appointments

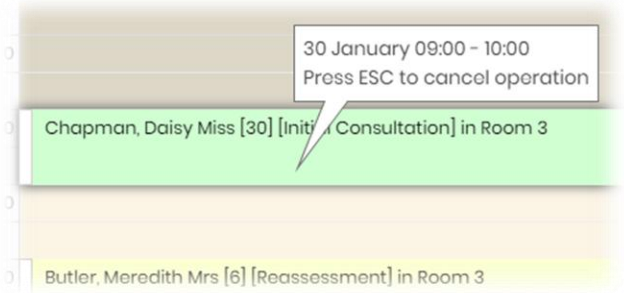
Creating an Appointment



1. Left-click and drag down to select an area in the diary and then release [1]

2. Right-Click on the highlighted area and select '**New Appointment**' [2]

Moving an appointment

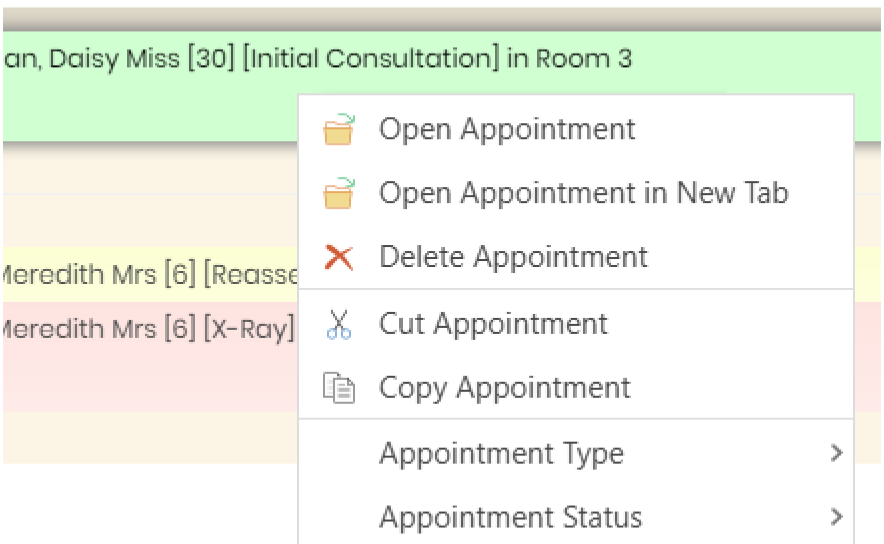


Left click, drag-and-dropping appointments allow you to move the appointment from the diary screen to another slot in the diary.

(Left click the appointment and HOLD the mouse button down then drag the mouse/appointment over to a new slot and RELEASE the mouse button)

A popup will appear showing that pressing the Esc key on your keyboard will cancel the move.

Opening an appointment (two methods)



[Method 1]

1) Double-click on the appointment

[Method 2] See image LEFT

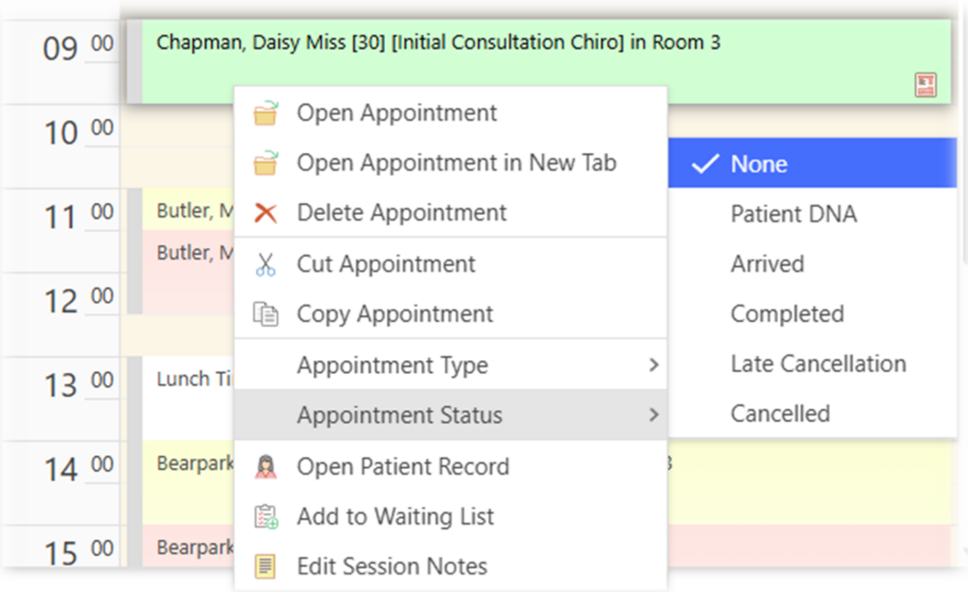
1) Right-click on the Appointment

2) Select '**Open Appointment**'

You can also open the appointment in a new tab by selecting '**Open Appointment in New Tab**'. Please see the Appointment Editor section for more information on how the appointment screen works.

Other Features and Functions

Right-Click Appointment Menu



Right-clicking an appointment will give numerous options.

You can change the **Appointment Status** or **Type** directly from this menu without opening the appointment. Also, you can **Delete**, **Cut** or **Copy** the appointment.

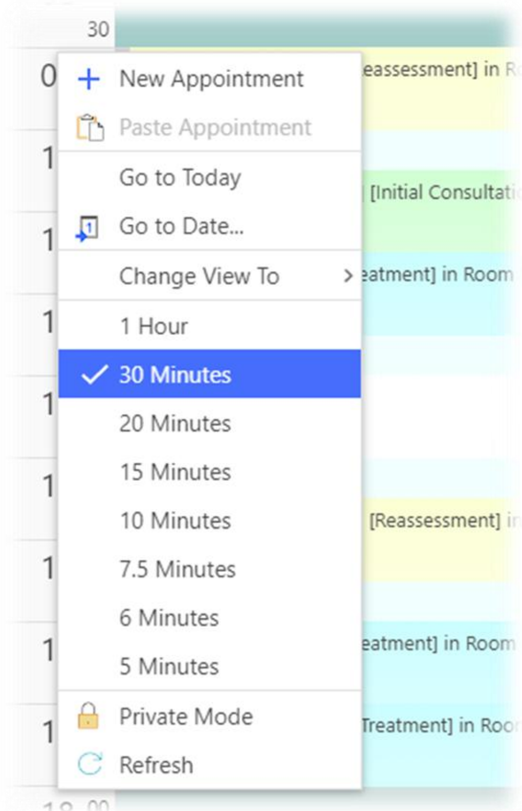
You can also add a patient to the waiting list from this menu should they need another appointment soon after their current one and there are no free available time slots. When you select this you will be taken to the New Waiting List Record.

At the bottom of the menu you can select "**Edit Session Notes**" which will create a new session note for the patient. The appointment has to be linked to a patient's record for this to work.

Right-clicking the diary after you've copied an appointment will allow you to '**Paste**' the appointment into a free slot on the diary using the same right-click menu, but on a free /empty slot in the diary.

Right-Clicking the Time Ruler

Right-clicking the time ruler brings up a few extra options



You can change between different time intervals on the diary by right-clicking the time ruler on the left-hand side of the diary. This diary by default is set to 30 minute intervals.

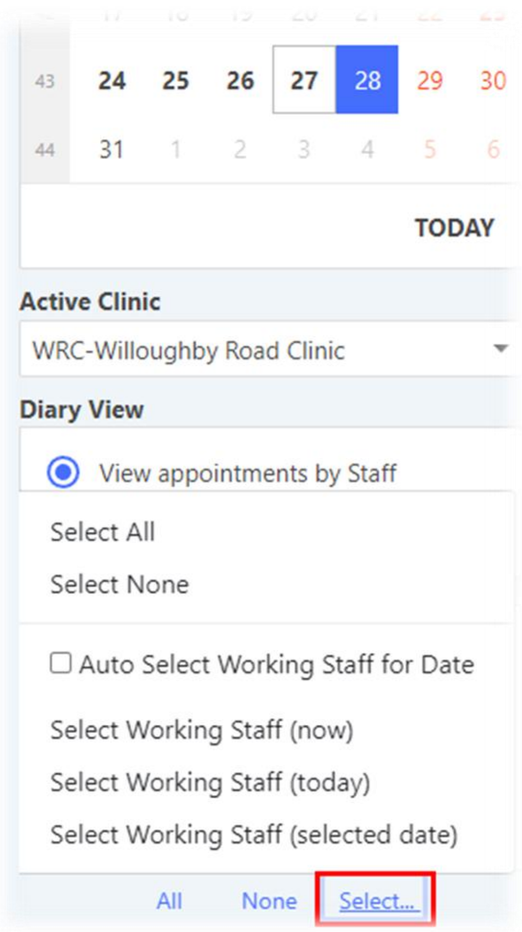
Other options are available from this menu and they include pasting an appointment you've copied previously, changing the view to day, work week etc using the '**Change View to**' option, and '**Go to Today**' which quickly changes the diary view to the present day.

Another feature of note is the **Private Mode**. When selected all appointments will be rendered with the text **[Booked]**. This could be used if you need to temporarily hide the patient names on the screen.

Selecting Staff Based on Working Hours

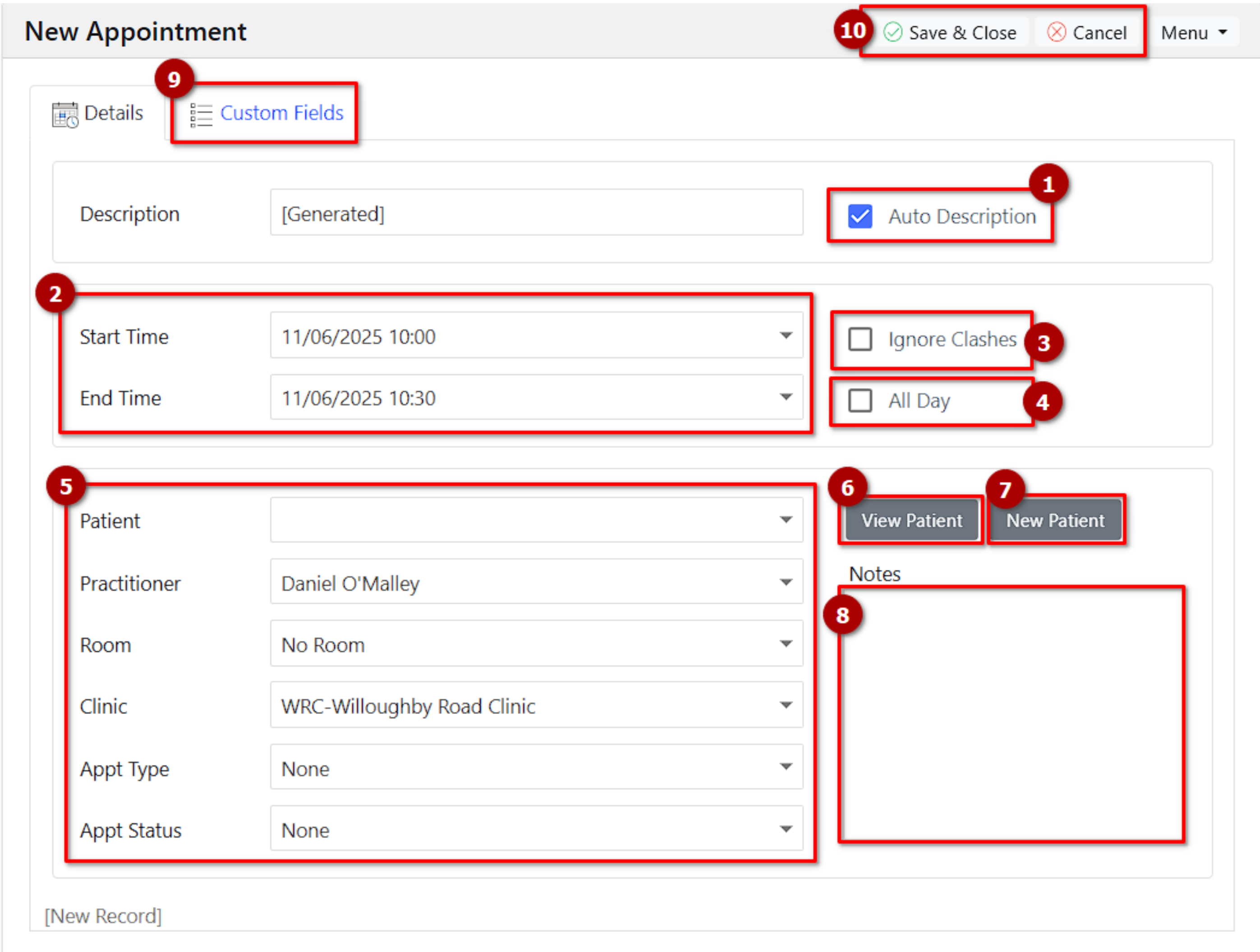
Left click on the blue **<u>Select</u>** link below the **Diary View** on the Diary's right hand panel. This will give you four additional options which are explained below.

- **Auto Select Working Staff for Date**" which, when enabled, automatically selects the staff working on the day that you select from the Diary Navigator. This feature has to be reselected in order to disable it.
- **Select Working Staff (now)** does a one time selection of the staff currently working <u>today</u> at this <u>moment in time</u>.
- **Select Working Staff (today)** does a one time selection of staff currently working <u>anytime</u> <u>today</u>.
- **Select Working Staff (selected date)** does a one time selection of staff working on the <u>current date</u> you have selected rather on the diary.



The Appointment Editor

This screen is used either for creating or editing an appointment record.



[1] The '**Auto Description**' checkbox when ticked will automatically fill in the '**Description**' field for you, so that on the main diary screen, the appointment caption is automatically populated with Patient, Staff and Room details.

[2] Specify the **Start** and **End Time** for an appointment, including the specific time.

[3] When '**Ignore Clashes**' is ticked this would mean that the appointment will not care if it is double-booked with another appointment. Equally another appointment can be booked in the same spot and no warning will be given.

[4] The '**All Day**' checkbox makes the appointment duration last all day.

[5] Select which '**Patient**' the appointment belongs to by simply typing in this box and it will perform a patient lookup. Additionally, there are drop-down boxes in this section for selecting the specific '**Practitioner**', '**Room**', '**Clinic**', '**Appointment Type**' and '**Appointment Status**'.

[6] '**View Patient**' allows you to view the Patient's record that is assigned to this appointment (see section '**Patient Editor**' for more information)

[7] The '**New Patient**' button creates a new patient record (useful if the appointment is for a new patient)

[8] You can record additional information in the '**Notes**' field relating to the appointment.

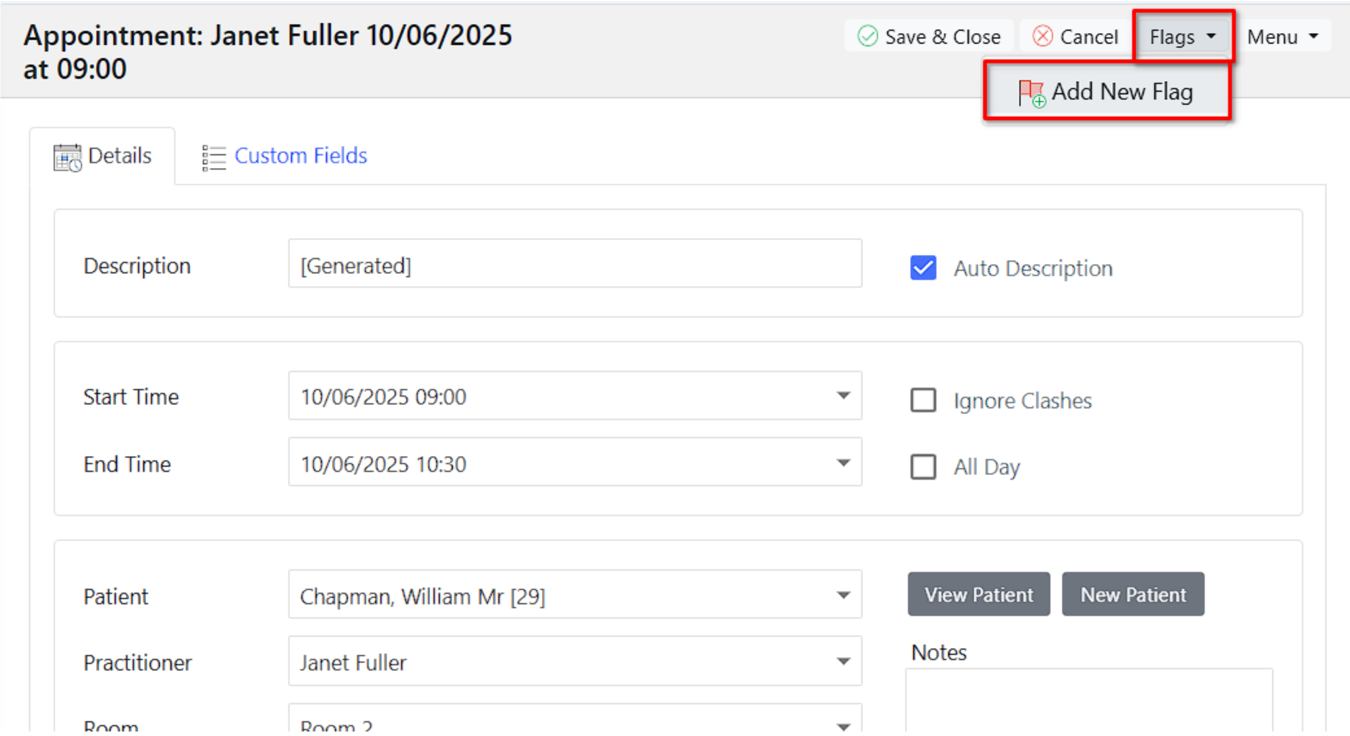
[9] If your appointment editor has any custom fields it will show here in the "**Custom Fields**" tab.

[10] Save the appointment or cancel any changes you have made and returns to the Diary Screen. You can also delete an appointment from here.

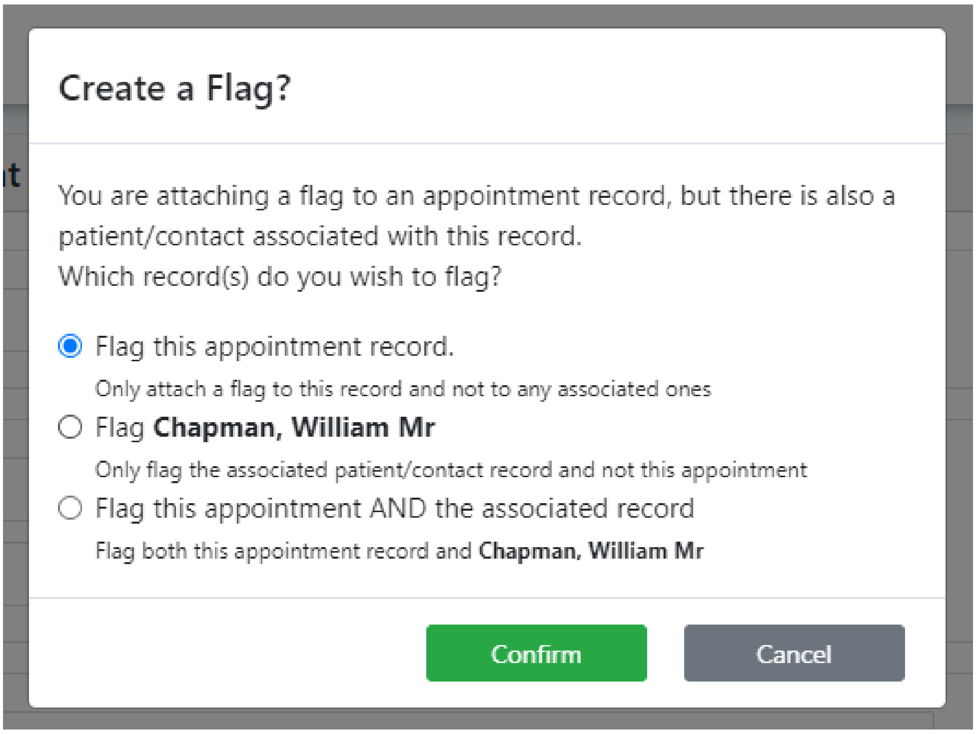
Creating Flags

You can **FLAG** appointment or patient records from withnin the web based diary. These will then show on appointment captions, or pop up if you open any associated appointment records. Follow the instructions below to create a flag. (This example is for an appointment record, but the same principle applies via a patient record.)

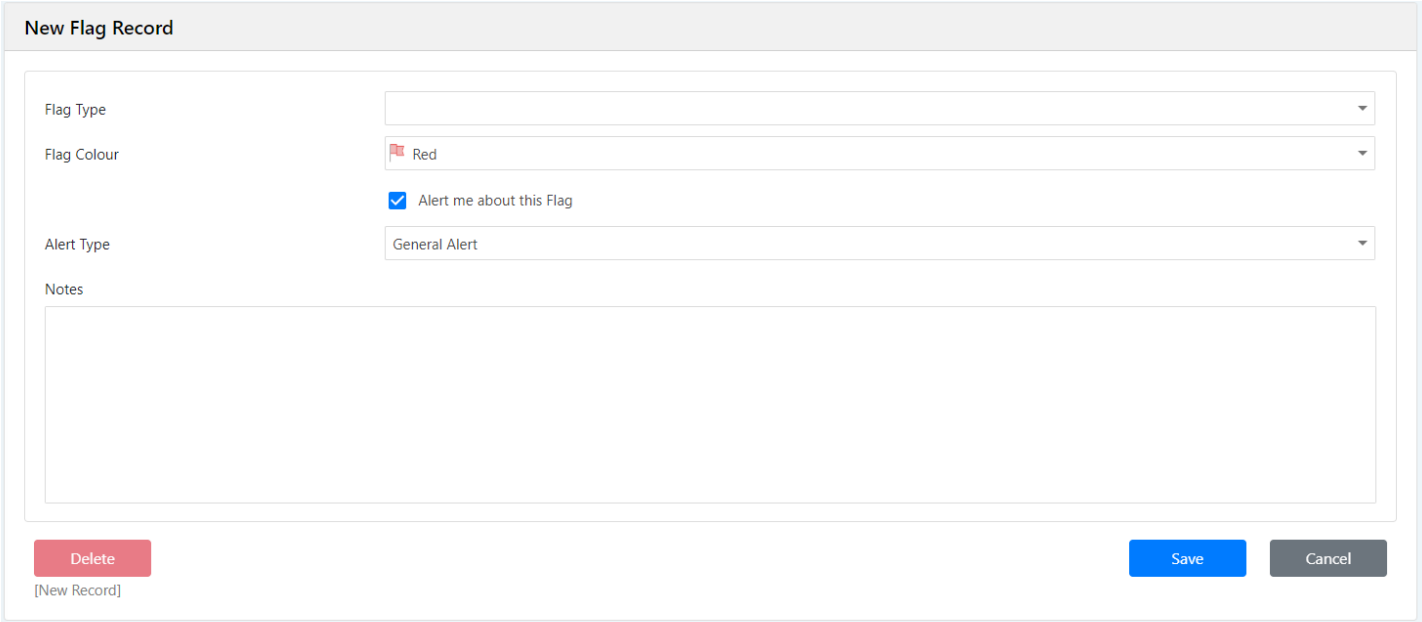
1) Click on the **Flags** drop-down button (these buttons only appears on saved records), and select **Add New Flag.**



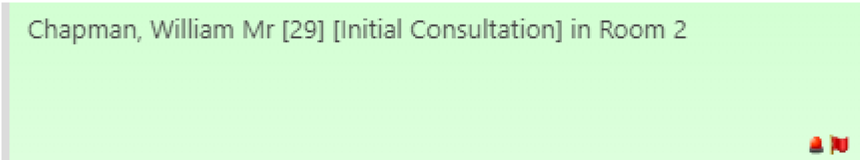
2) The system will then offer some further flag location options. Select the desired option, and click '**Confirm**.' **(THIS STEP ONLY APPLIES TO CREATING A FLAG FROM AN APPOINTMENT)**



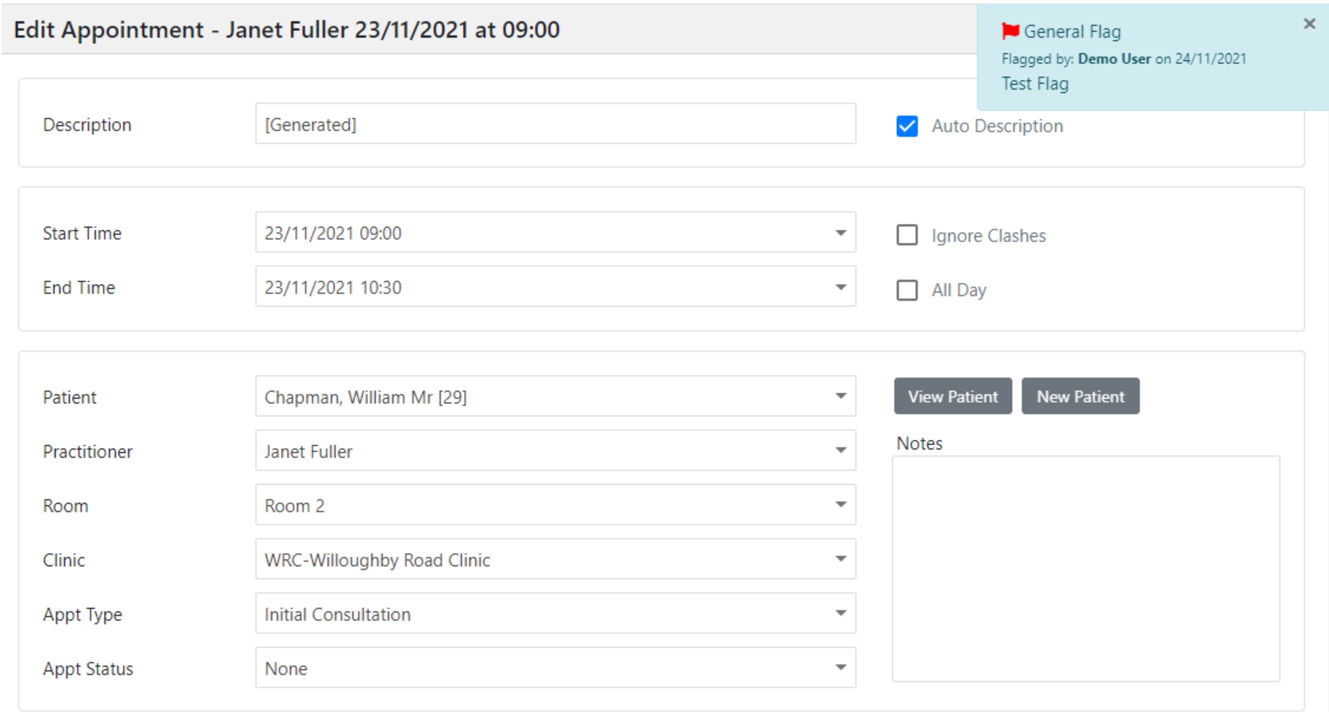
3) Fill in the settings for your flag. You can select flag type, and colour. (These options can be modified from within the full ClinicOffice application.) Once you are happy, click **'Save'.**



4) The appointment caption will now show a visual flag, like the one below. (Does not apply if a flag relates to the patient.)

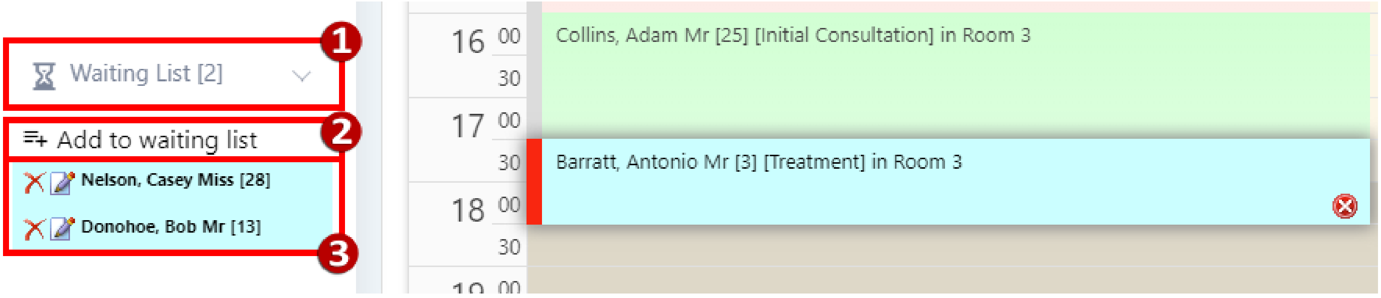


5) When you open an appointment or patient record with a flag attached, you will now see a visual pop-up relating to the flag. If you open an appointment where the patient has the flag attached, then this will also show, but opening a patient that has a flagged appointment would not show any flag warning. (This works in the same way as the main ClinicOffice application)



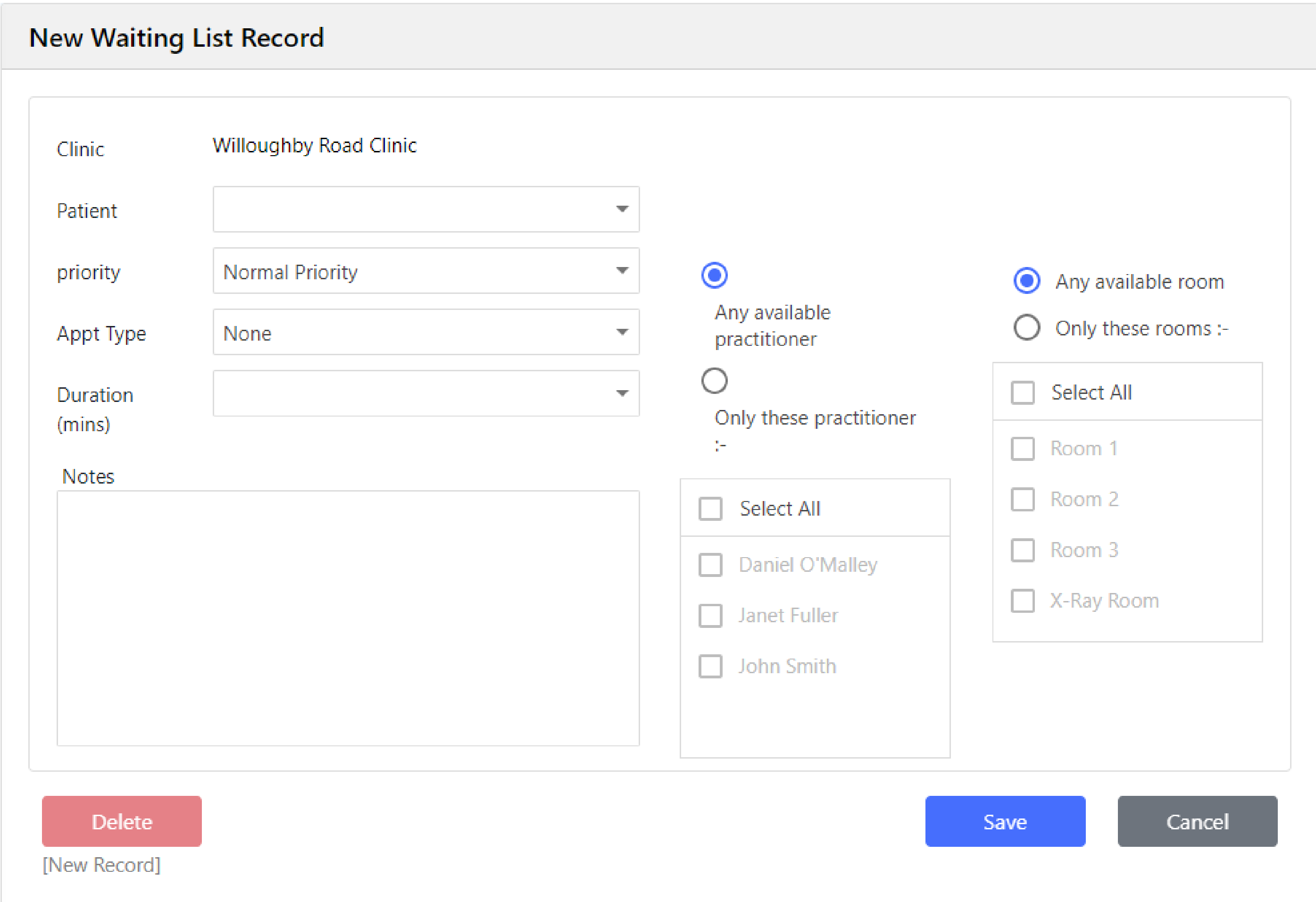
The Waiting List

The waiting list links up to the waiting list present on your ClinicOffice program. This can be used for patients who need an appointment soon but perhaps because your clinic is fully booked for the foreseeable future, they are waiting for a cancellation to appear so that they can come in sooner.



[1] The Waiting List sits on the left-hand side panel of the diary towards the bottom. You can expand or minimise it by clicking on the arrow to its right. This can automatically be displayed once an appointment in the future has been cancelled by going to the **Settings** -> **Diary Options** and ticking **Auto Show Waiting List**. This is handy because it reminds the user that people are waiting for appointments.

[2] 'Add to waiting list' allows you to add patients to the waiting list. When you click on it the screen below appears.



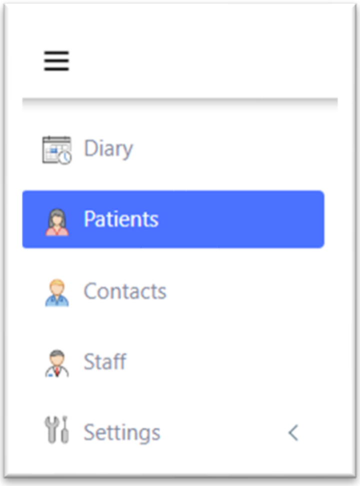
The above screen allows you to specify the patient, their priority of importance; the appointment type, the duration and if they prefer a practitioner or if they require a certain room. These details will be copied across when it is converted into an appointment.

[3] At the bottom of the waiting list is the list of patients who are waiting for an appointment. You can view their required appointment details by hovering your mouse above their name. You can add it as an appointment from this list by simply dragging and dropping the patients name onto the desired location in the diary. This will take you into the appointment editor screen where you can save it as an appointment.

The Patient Grid

You can view a list of Patients in your database via the Patient Grid.

Go to: Diary and click on the Patients icon on the left-hand side panel



Features (see image BELOW)

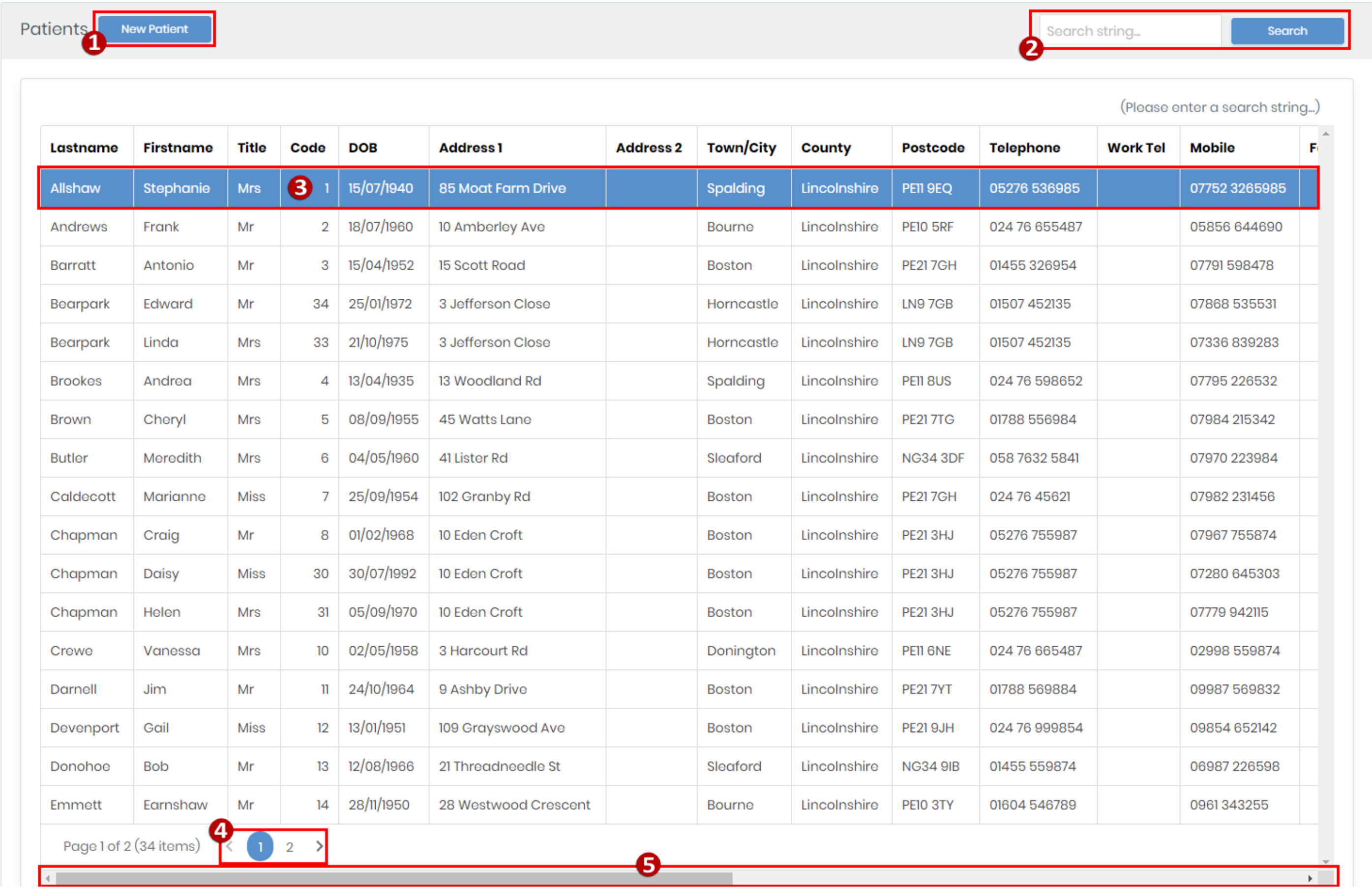
[1] The '**New Patient**' button creates a New Patient in your database. It opens the Patient Editor.

[2] The search bar allows you to search for Patients in your database

[3] The grid allows you to open a patient's record by doubling-click on the line

[4] The page selector allows you to view more patients - either click the arrows or the page number to view the next page.

[5] The horizontal scroll bar allows you to scroll through all the grid data quickly.

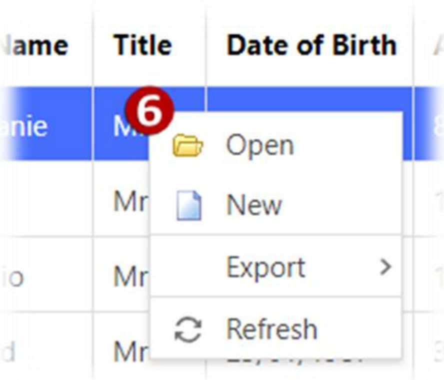


Lastname	Firstname	Title	Code	DOB	Address 1	Address 2	Town/City	County	Postcode	Telephone	Work Tel	Mobile
Allshaw	Stephanie	Mrs	1	15/07/1940	85 Moat Farm Drive		Spalding	Lincolnshire	PE11 9EQ	05276 536985		07752 3265985
Andrews	Frank	Mr	2	18/07/1960	10 Amberley Ave		Bourne	Lincolnshire	PE10 5RF	024 76 655487		05856 644690
Barratt	Antonio	Mr	3	15/04/1952	15 Scott Road		Boston	Lincolnshire	PE21 7GH	01455 326954		07791 598478
Bearpark	Edward	Mr	34	25/01/1972	3 Jefferson Close		Horncastle	Lincolnshire	LN9 7GB	01507 452135		07868 535531
Bearpark	Linda	Mrs	33	21/10/1975	3 Jefferson Close		Horncastle	Lincolnshire	LN9 7GB	01507 452135		07336 839283
Brookes	Andrea	Mrs	4	13/04/1935	13 Woodland Rd		Spalding	Lincolnshire	PE11 8US	024 76 598652		07795 226532
Brown	Cheryl	Mrs	5	08/09/1955	45 Watts Lane		Boston	Lincolnshire	PE21 7TG	01788 556984		07984 215342
Butler	Meredith	Mrs	6	04/05/1960	41 Lister Rd		Sleaford	Lincolnshire	NG34 3DF	058 7632 5841		07970 223984
Caldecott	Marianne	Miss	7	25/09/1954	102 Granby Rd		Boston	Lincolnshire	PE21 7GH	024 76 45621		07982 231456
Chapman	Craig	Mr	8	01/02/1968	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987		07967 755874
Chapman	Daisy	Miss	30	30/07/1992	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987		07280 645303
Chapman	Helen	Mrs	31	05/09/1970	10 Eden Croft		Boston	Lincolnshire	PE21 3HJ	05276 755987		07779 942115
Crewe	Vanessa	Mrs	10	02/05/1958	3 Harcourt Rd		Donington	Lincolnshire	PE11 6NE	024 76 665487		02998 559874
Darnell	Jim	Mr	11	24/10/1964	9 Ashby Drive		Boston	Lincolnshire	PE21 7YT	01788 569884		09987 569832
Devenport	Gail	Miss	12	13/01/1951	109 Grayswood Ave		Boston	Lincolnshire	PE21 9JH	024 76 999854		09854 652142
Donohoe	Bob	Mr	13	12/08/1966	21 Threadneedle St		Sleaford	Lincolnshire	NG34 9IB	01455 559874		06987 226598
Emmett	Earnshaw	Mr	14	28/11/1950	28 Westwood Crescent		Bourne	Lincolnshire	PE10 3TY	01604 546789		0961 343255

Page 1 of 2 (34 items) 1 2

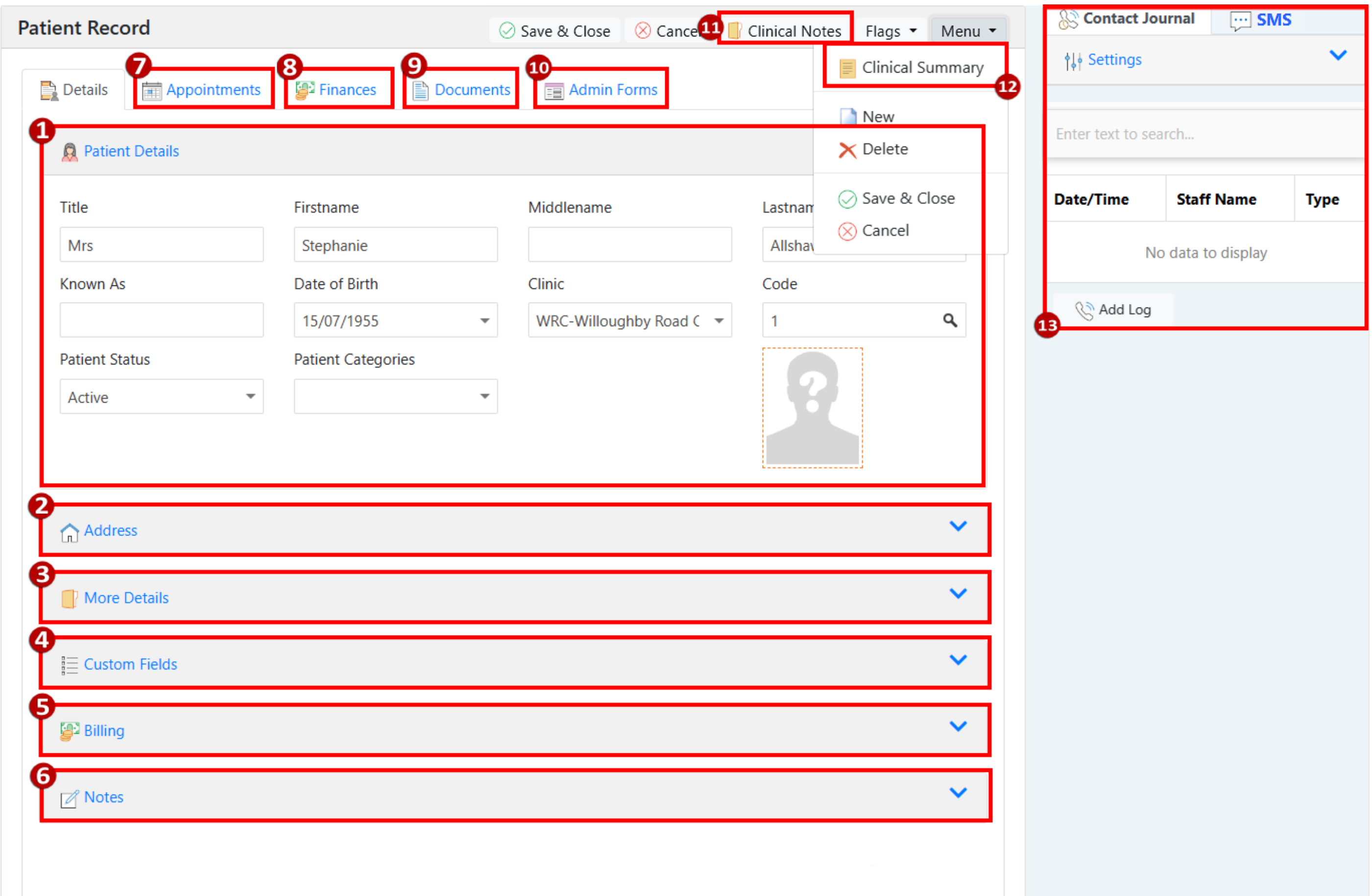
[6] Right-clicking on a patient in the grid presents four options:

- **Open** – Opens the patient's record
- **New** – Creates a new patient record
- **Export** – Allows you to export the information from the current grid into a PDF, RTF, DOCX, CSV, XLS or XLSX format.
- **Refresh** – Does a manual refresh on the current grid. Any new records added while viewing the grid will become visible.



The Patient Record

The Patient Record screen is used either for adding and viewing information about the patient.



[1] The **Patient Details** Section contains information such as the Patients full name, their Code (their unique database reference number), DOB, Patient Category and Status. All are definable and vital for an organised patient database.

[2] Use the **Address** section to input their address information. Under here is also the **Contact** section for fields such as Telephone numbers, email etc.

[3] The **More Details** section allows you to record information such as Height, Weight, Gender, the patient's GP and how was the patient referred to the clinic.

[4] If you have any custom fields stored in the Patient Editor back in ClinicOffice, they can be viewed from the **Custom Fields** tab. Note that you can enter/edit information within these fields but if you wish to edit or remove the actual fields you will need to do this via the ClinicOffice Hosted or Local editions.

[5] The **Billing** area allows you to specify the discount rate of the patient if they have one and alternative invoice recipients such as an insurance company.

[6] The patients **Notes** is where additional general non-medical notes can be stored.

[7] The **Appointments** tab will allow you to view and even open appointments pertaining to the patient.

[8] The **Finances** tab will allow you to see any financial records, such as payment and invoices, that are related to this patient.

[9] The **Documents** tab will allow you to view, add or download any documents pertaining to the patient.

[10] The **Admin Forms** tab shows all admin-based forms attached to the patient's record.

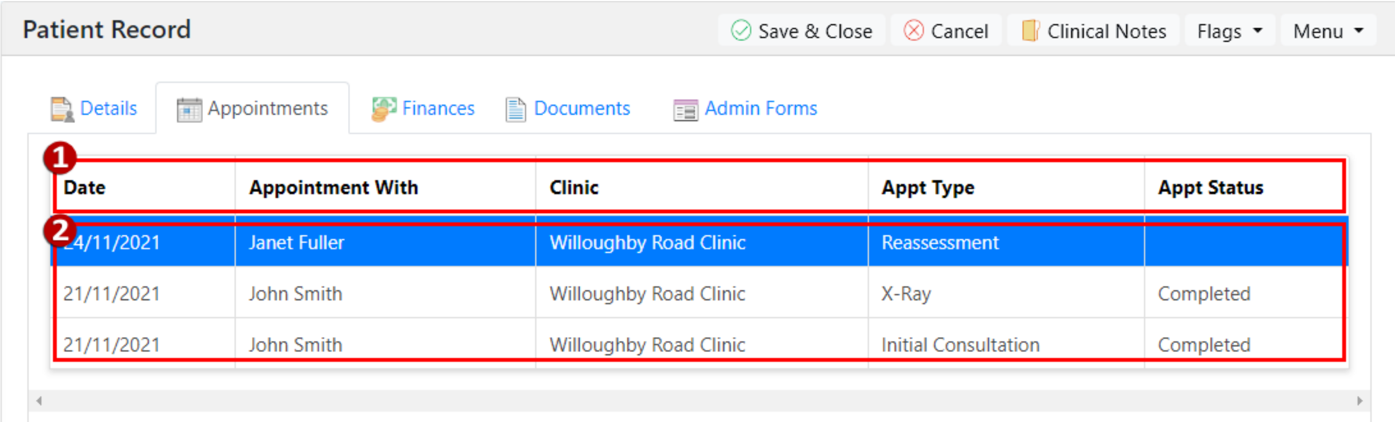
[11] The **Clinical Notes** will take you to another page which allows you to view the patient's case and session notes, as well as any attached forms, images, and visual notes. New case and session notes can also be added from the web edition of ClinicOffice.

[12] The **Clinical Summary** allows you to view the patient's clinical notes within a preview panel.

[13] The **Contact Journal/SMS** is where you can view any SMS, emails or contact logs that are stored for this patient. New contact logs can be recorded from here as well. For example, you can record information pertaining to any telephone or in person conversation you had with that patient. You can also send out an SMS message by clicking the SMS tab.

The Patient Record – Appointments

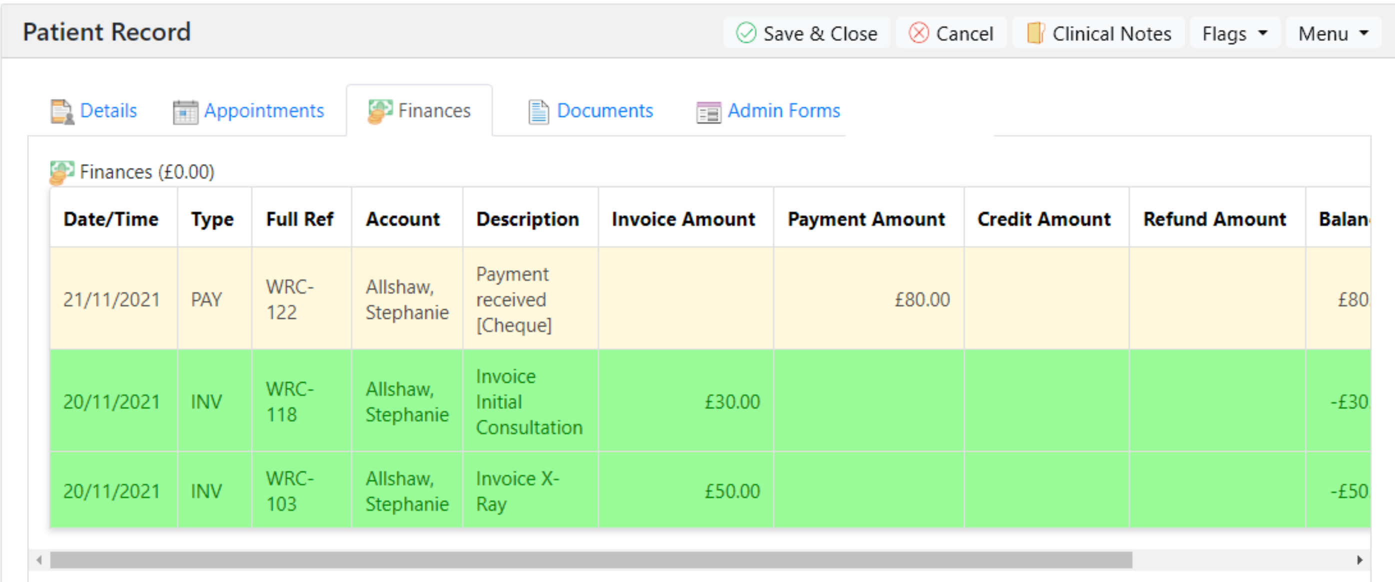
The Appointments tab allows you to see all past, current and future appointments a patient currently has with the clinic.



[1] You can change the sort order of the grid when you left click on one of the headers. By holding down the shift key and then left clicking you can select to sort on more than one column at a time.

[2] Double-click an appointment to open the record.

The Patient Record – Finances

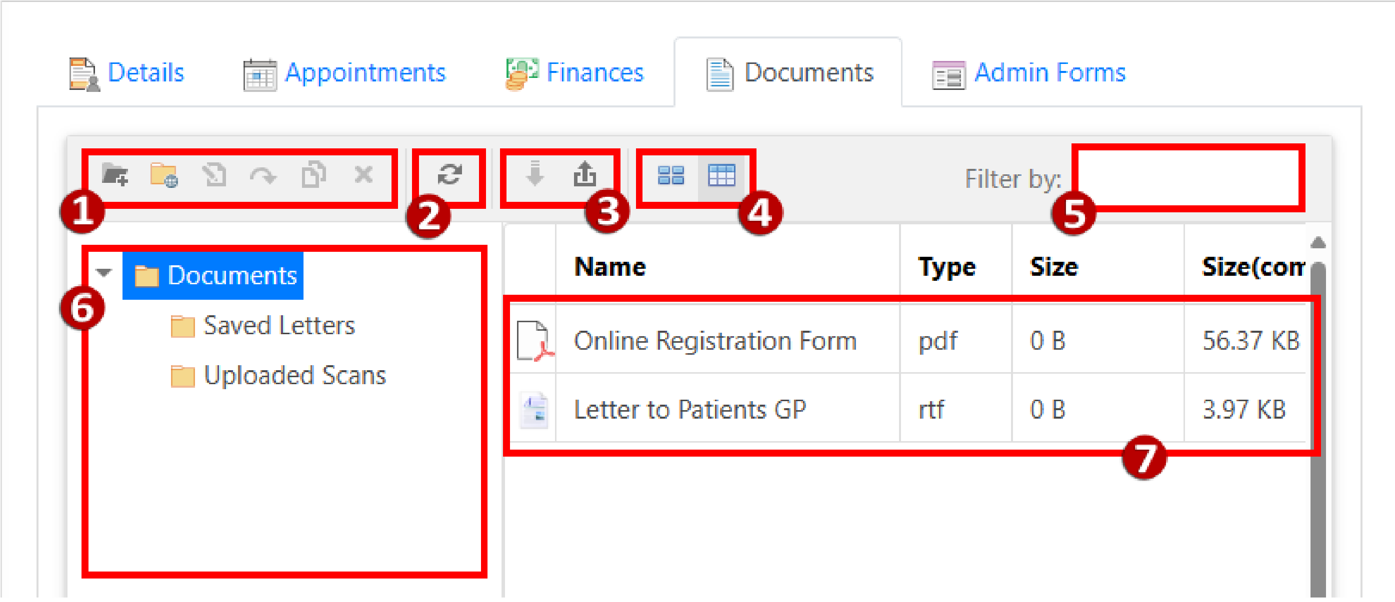


The Finances tab of the Patient Record allows you to see all finances that the patient is directly involved with. This includes invoices raised, payments made, credit notes issued and any refunds. Towards the top left of the grid the patient's overall financial balance can be seen. Like other grids, the sort order can be changed by left clicking on any of the column headers.

Financial information cannot be changed from here and instead you will need to go into the main ClinicOffice application to make any adjustments if they are needed.

The Patient Record – Documents

The Documents tab allows you to view all documents attached to the patient's record. You can also download and upload from here as well.



[1] From left to right the buttons are: **Personal Folder**, **Global Folder**, **Rename**, **Move**, **Copy** and **Delete**. The 'Personal Folder' button will create a unique folder for this patient only. The 'Global Folder', as the name implies, is a folder that will exist for all patients. This does not mean that the patient's documents will be present on all patient records but merely the folder acts as a placeholder for all patient records. Both personal and global folders can be created as a root folder or sub-folder.

[2] The **Refresh** button refreshes the documents present on the grid. This is useful if you have just renamed a document and the webpage has not refreshed yet.

[3] The **Download** and **Upload** button will allow you to either download existing documents or upload new documents to and from the patient's record.

[4] The **Thumbnail** and **Details** buttons when clicked will either appear as an icon or with details. The details will display the document name, file type, document size, who it was created by and updated by.

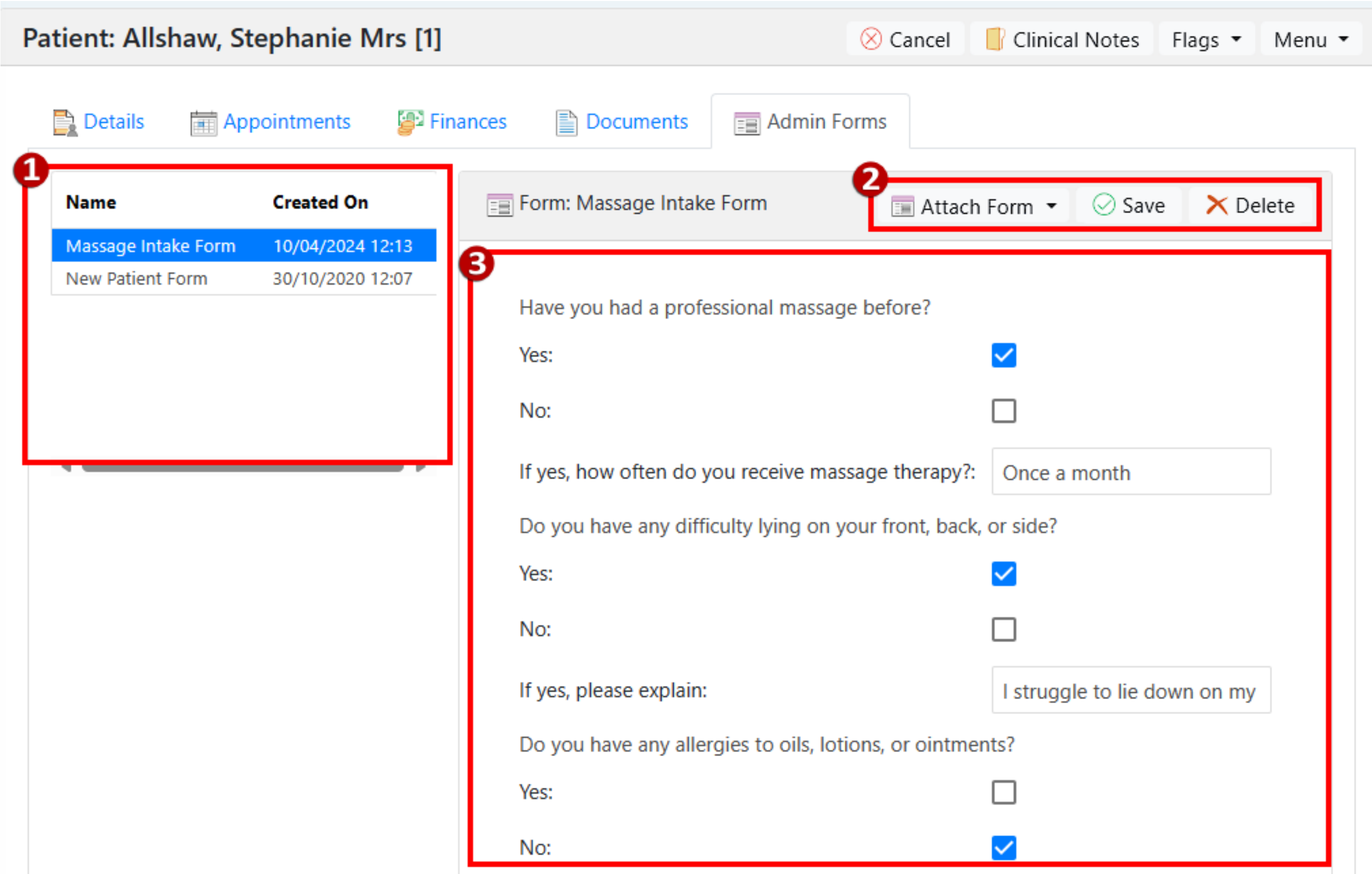
[5] The **Filter By** acts like a search that will allow you to search on either the document's name or the document's file type (i.e. PDF, DOCX, PNG).

[6] The **Tree Folder Panel** acts like a navigation panel and it allows you to select any subfolders. You may need to click the small arrow ▶ to expand on a folder to view the subfolders. You can add new folders to this by using two of the buttons mentioned in point one.

[7] The **Document Grid** allows you to view what files you currently have stored for the patient. Documents and images cannot be opened and viewed from this screen so if you wish to view a document you will need to first download it and then view it on your local device.

The Patient Record – Admin Forms

The Admin Forms tab allows you to view all admin-based forms attached to the patient's record. Although forms can be clinical as well, Admin forms are a way for staff to view certain forms without the need to accessing the clinical notes as well. This screen does allow for you to also download and upload forms from here as well.



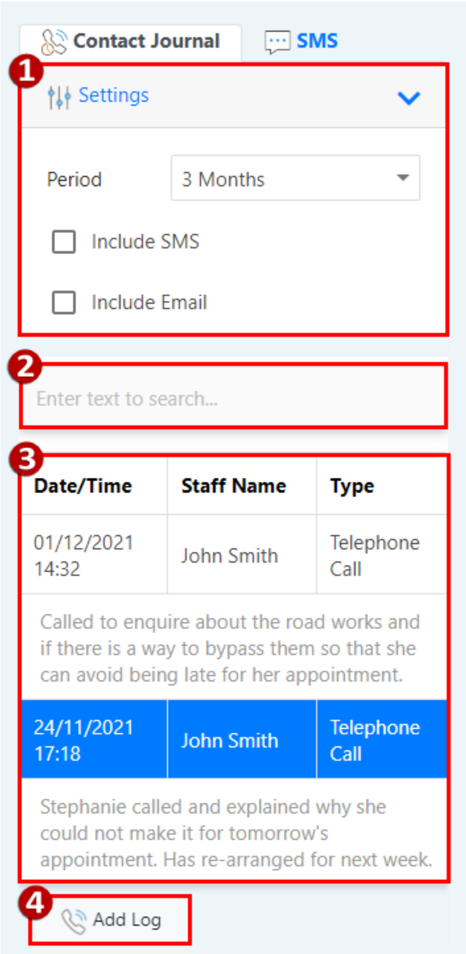
[1] This navigation window displays a list of forms that have currently been added to this patient and allows you to switch between the different forms.

[2] From left to right the buttons are **+ Form**, **Save** and **Delete**. The **+ Form** will present a drop-down menu of forms that can select from to add to the patient. The Save and Delete buttons are self-explanatory but refer to the specific form you have selected.

[3] This displays the contents of the form. You can modify the contents of the form from here as well.

NOTE Please remember to click on the **Save** button before selecting another form or navigating to a different section of the Web Editon of ClinicOffice. If you do not any changes will not be saved.

The Patient Record – Contact Journal



The contact journal is an area where you can store ongoing notes about the conversations you may have with a person, for example notes about a telephone conversation.

(See Image to the Left)

[1] The **Settings** will allow you to specify how far back you wish to see the patient's contact journal. You can also select to see SMS and emails included into the journal.

[2] This allows you to search for any expression found within the contact journal's notes.

[3] This is the preview window and can display contact notes, SMS messages and emails.

[4] When you click the **Add Log** button it will open a new journal log record window will open as show further down.

> The Contact Journal usually sits to the right of the patient's record. If you are unable to see it, then it might be minimised. If this is the case, there should be three small dots (⁝) towards the top right of the screen and when you click on this the Contact Journal will expand out.

(See Image to the Right)

[1] The **Date/Time** of the journal log will automatically default to the current date and time, but you can adjust this if you need to.

[2] The patient/contact's name is auto filled in and cannot be changed because we are creating it straight from their record.

[3] The Staff Member again is auto filled in with your name. This can be changed from the drop-down list.

[4] Select from a list of predefined log type values. Note that you can customise this list via the main ClinicOffice application's Types and Categories area.

[5] This is where you will make your note about your contact that you have had with the patient.

The Patient Record – SMS

The SMS chat displays all the sent and received messages for the patient. It lays your messages out in a similar style to many messaging apps. You can see all messages you have sent to the patient in one colour and all messages the patient has sent back in another colour. This screen also allows you to send new messages to the patient.

The components of this screen are listed below: -

[1] The **Settings** allows you to specify how far back you wish to see for the SMS correspondence and whether to display the most recent at the top or at the bottom of the SMS preview.

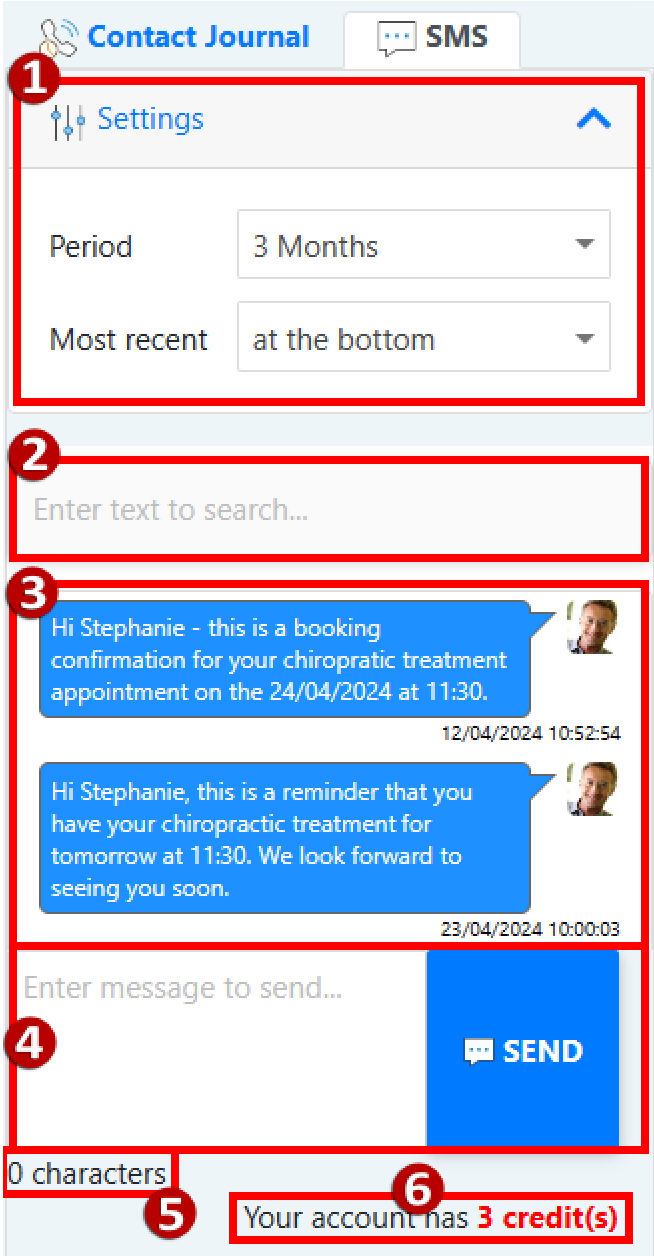
[2] The Search field allows you to search on specific words used within the messages.

[3] This is where the sent and received SMS messages are display.

[4] This is where you can type a new message to be sent to the patient. After clicking the **Send** button, the message will be sent instantly.

[5] This counts the number of characters within your message. A single SMS message is 160 characters, so if you go over this the text will turn to red. You can still send the SMS, but it will be more than one message and in turn more than one SMS credit.

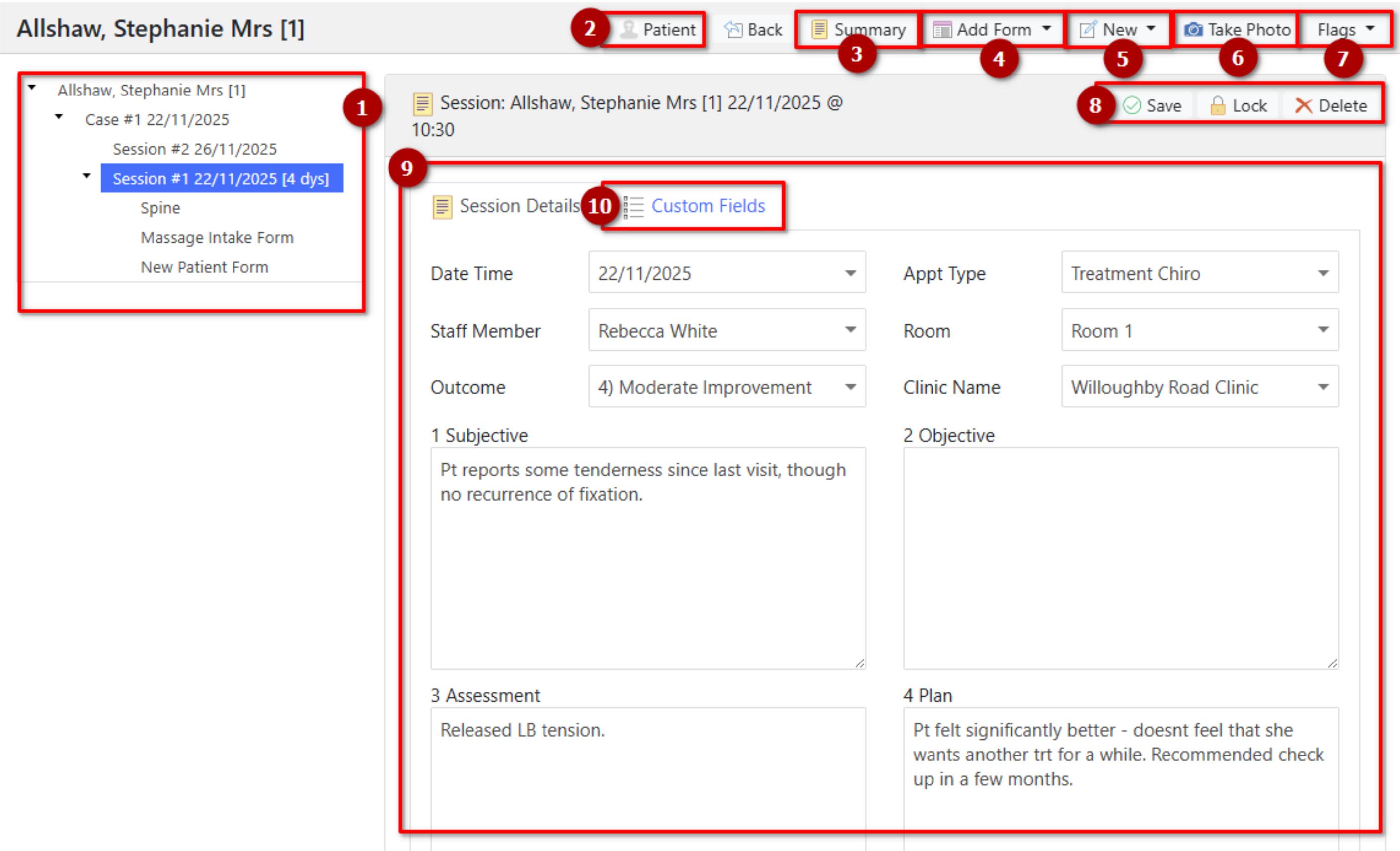
[6] This displays the number of SMS credits that you have remaining.



> The SMS chat, like the Contact Journal usually sits to the right of the patient's record. If you are unable to see it, then it might be minimised. If this is the case, there should be three small dots (⁝) towards the top right of the screen and when you click on this the SMS chat window will appear.

Clinical Notes

The Clinical Notes page will show all medical notes for this patient. It will allow for you to add new case and session notes as well images, documents and additional forms for that patient.



[1] The **Navigator** panel allows for you to explore the notes for the patient. From this panel you can select to view any case notes, session notes, any attached forms, and visual notes. You can expand or shrink a section by clicking either of the arrows ▶ (clicking on this expands or reveals more) ▼ (clicking on this shrinks what is on display).

[2] The **Patient** button takes you back to the main patient record for this current patient.

[3] This displays the clinical **Summary** for the patient within a separate floating window.

[4] When you click on the **Add Form** button you are presented with a list of forms you can attach to the patient's clinical notes.

[5] From this **New** button you can select to create a new case note, session note, visual note or attach a document.

[6] The **Take Photo** button allows you to take a photo from your device and store it on the patient's record.

[7] From the **Flags** button you can add a new flag to the current patient the clinical notes are on behalf of.

[8] From these three buttons you can delete the current selected note, lock the note, or save any changes made to it.

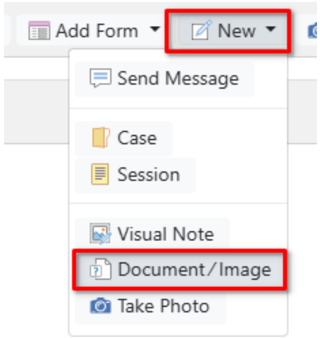
[9] Whenever you select a note or form from the navigator panel it will appear here. With a case or session note, it will display two tabs, the 'Details', which are the default built in fields and the 'Custom Fields'. This will also display a preview of any attached visual notes.

[10] The **Custom Fields** tab displays any custom fields that have been added to either the session or case notes. ClinicOffice Web currently has no way to pull through the layout of the notes so fields will appear in a single column.

Although you can add a new session note by clicking on the New button and selecting Session, we would recommend that you create a session note via the patient's appointment within the diary. To do this, go to the Diary, locate the appointment, right-click on it and select **Edit Session Notes**. This will create the session note and case note if there isn't already a case note, and it links directly to the appointment going forward so that you can see which session note belongs to an appointment.

Clinical Notes – Inserting Images and Comparing

There are two ways that you can insert an image into the patient's clinical notes, the first is to insert an existing image or photo and the second is that you can take a new photo from your current device. Both methods are discussed below.



Method 1 – Importing Existing Images

[1] Open the patient's record and click the **Clinical Notes** button.

[2] From the next screen click the **New** button and select **Document/Image**.

[3] Locate and then select your image and click **Open**.

The image will now appear in the Clinical Notes Navigator panel. Note that in step three you can import multiple images at a time by selecting more than one image.

Method 2 – Take a New Photo

This next method will only work if you are using a smartphone or tablet.

[1] Open the patient's record and click the **Clinical Notes** button.

[2] From the next screen click the **Take Photo** button.

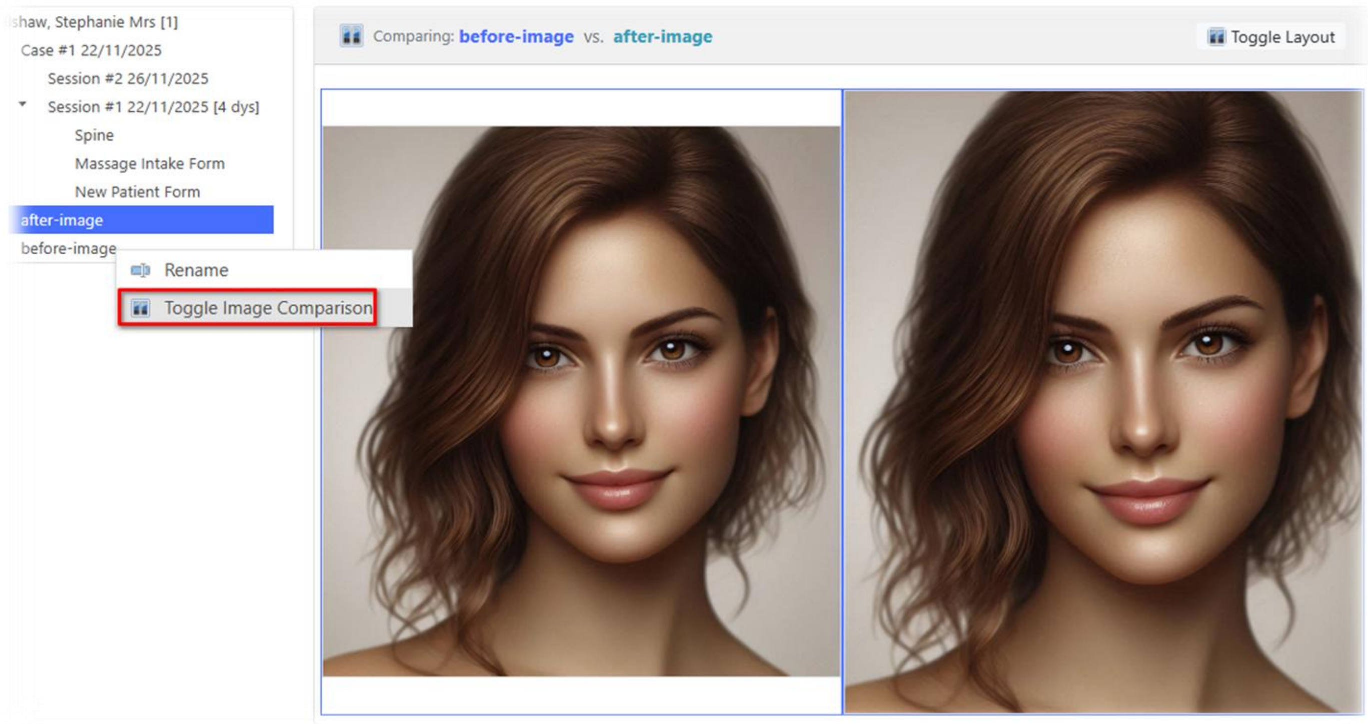
[3] Take the photo and select the relevant option to confirm you are happy with it.

Once the image has been uploaded it will be named as "Image-…" with the date and time of when the image was taken. You can rename this by selecting the image from the Navigator panel and clicking the Rename button at the top of the preview screen.

Image Comparison

The Clinical Notes also supports a side-by-side comparison of two images. This is useful if you need to do a before and after comparison.

To do this, right click or long press (depending on whether you are using a PC, Mac, Phone or Tablet) on the first image from the Navigator panel and select **Toggle Image Comparison**. Click on the second image you wish to compare, and you will see a side-by-side comparison like the example below.



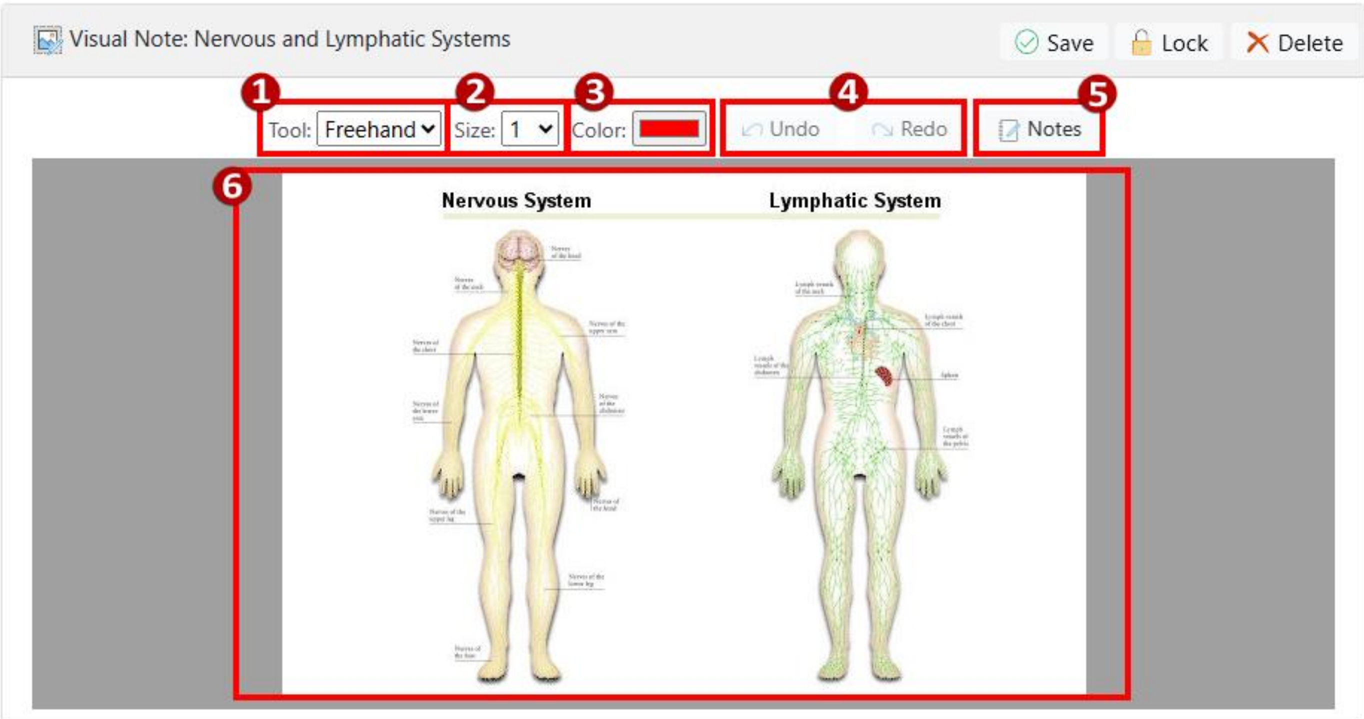
NOTE If you are using a phone or your tablet is in portrait mode the second image will wrap itself below the first image instead of appearing side by side.

Clinical Notes – Visual Notes

A visual note is a template image that you can add to the patient's clinical notes, and this image can be annotated by putting different markers on to it. You can also add additional notes to the image as well.

To add a new visual note:
1) From the Clinical Notes click the **New** button
2) Click **Visual Note**
3) Select the visual note image you wish to add and click **OK**
4) Give the new visual note a name and again click **OK**

The visual note will be added to whichever node you have selected i.e. case or session note.



[1] This allows you to select the style of **tool** you wish to annotate the image with.

[2] You can set the **size** of the line that you mark the image with.

[3] You can set the **colour** you wish to mark the image with.

[4] If you make a mistake, you could use the **Undo** or **Redo** buttons.

[5] When you click the **Notes** button a separate floating notes window appears that allows you to add additional information pertaining to the image.

[6] This area both displays the image and allows you to make the necessary annotations to the image.

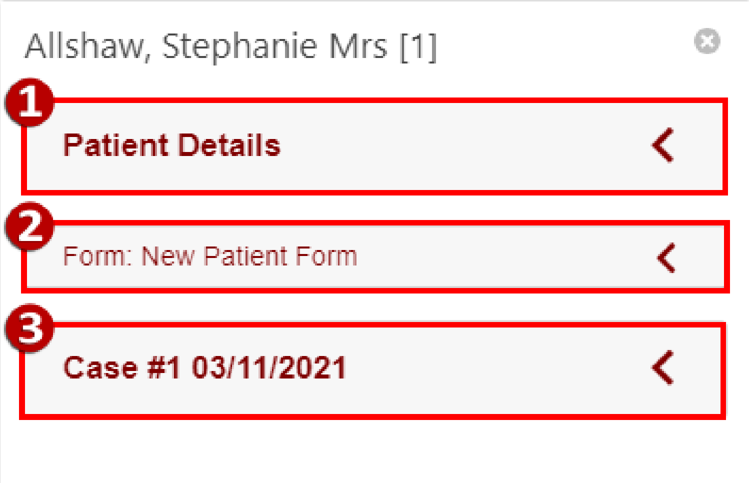
You can add additional visual notes templates by logging into the main ClinicOffice software (Hosted or Local editions), go to the **Tools** menu and click the **Visual Note Manager** button. From that screen you can click the **Import From File** button and add whatever image you require. Once you have done this, you may need to refresh the ClinicOffice Web edition page, but the new template image will then be available.

Converting Images to Visual Notes

Aside from adding new visual note templates you can also convert any image attached to the clinical into a visual note. To do this, go to the image on the clinical notes and click the **To VisNote** button (top right above the image). You can then annotate this image like any other visual note.

Clinical Notes – Clinical Summary

In addition to viewing the clinical notes individually, you can also preview all notes at once via the Clinical Summary. To access this, click on the **Clinical Summary** button from the patient's Clinical Notes screen. Alternatively go to **Patients** > open a patient's record > **Menu** > **Clinical Summary**.



[1] The **Patient Details** contains an overview of the information stored within the patient's record.

[2] Any **Forms** attached to the patient's clinical notes will be displayed. When a form is attached at the root or top level it will appear independently but if it is attached to a case or session note it will within that note as a subgroup.

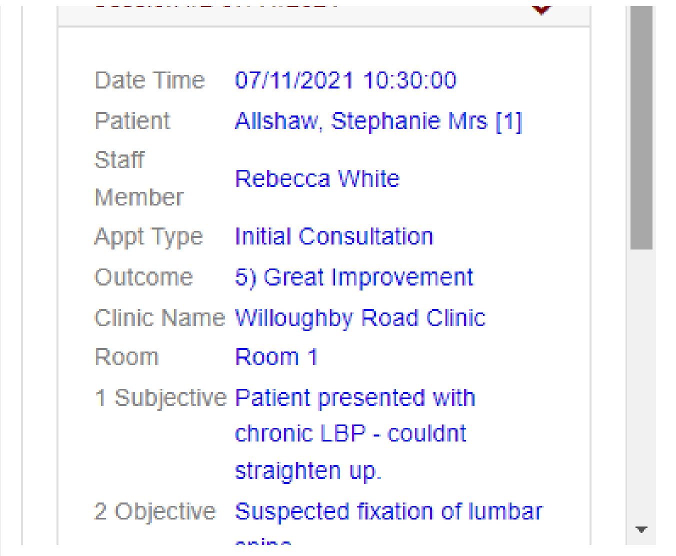
[3] Case notes are also included in the summary and their adjoined session notes will be displayed within the case note's preview.

Each of these sections can be expanded on to view all information within them. Below is an example of a case note and a session note.

As mentioned, the case note can house multiple sub notes such as session notes and forms. When you expand the note, you will first see any notes from the case note. You can then expand the attached session notes and any attached forms.

The notes will present the patient details at the top, then any forms not attached to a case or session note and then the cases below. All case notes are presented in a chronological order with the newest note at the top.

Any forms or visual notes are also displayed within the clinical summary. This will appear with whichever note they are attached to.



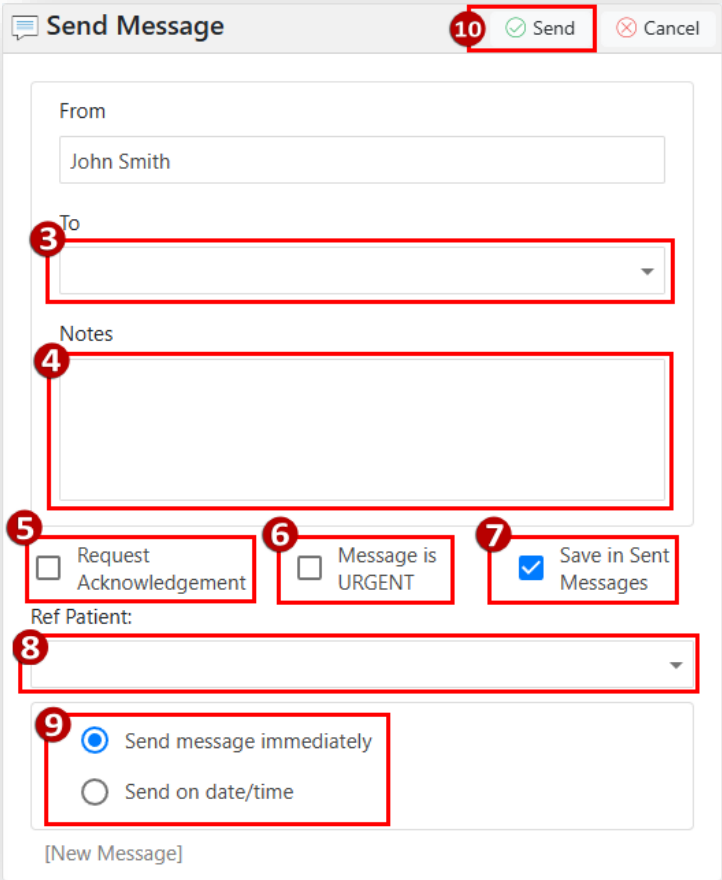
ClinicOffice Messages

Like the main ClinicOffice edition the Web edition also supports the sending and receiving of internal messages between members of staff. Messages can be viewed on either edition.

Sending a Message

1) Click the **My Messages** icon on the left side in the Web edition.
2) This will take you to the **Messages - Inbox**, from here click the 

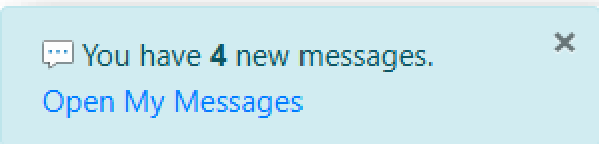
button. The window like the one to the right will appear.
3) Select from the **To** field the staff member you are going to send the message to. You can select more than one.
4) Enter your message in the **Notes** field.
5) You can tick the **Request Acknowledgement** if you wish to see that the recipient has read the message.
6) If you wish the message to be delivered as an urgent message and for it to be highlighted in red tick the **Message is URGENT** checkbox.
7) If you wish to keep a copy of the message you sent in the Sent box, make sure to leave **Save in Sent Messages** ticked.
8) Select whether you want to **Send** message immediately or if you wish to select a date and time for the message to be delivered.
9) If you need to reference a patient or their appointment, then you can link the patient to the message using the **Ref Patient** field.
10) Click **Send** once to send the message.



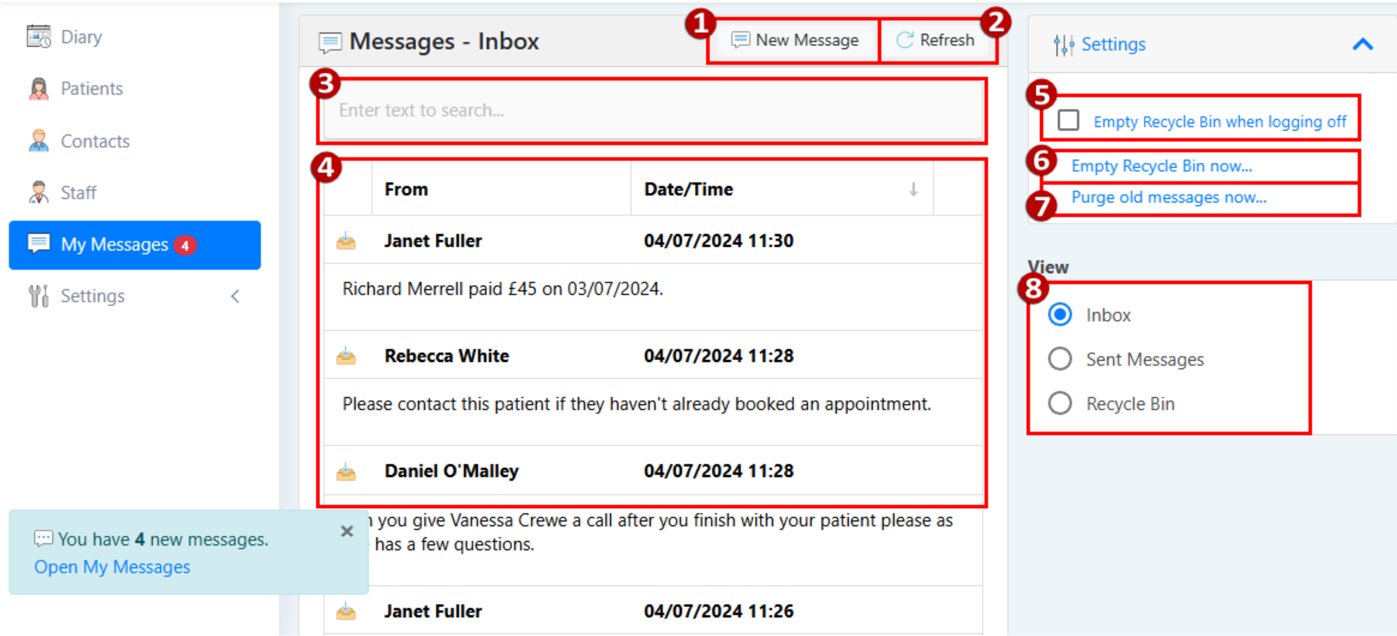
You can also send a message via an appointment and a patient by clicking on the Menu icon within the record and selecting **Send Message**. In addition to this, you can send a message via the patient's clinic notes by clicking on the **New** button, again select **Send Message**. When you send a message from any of these record types then the patient is automatically linked to the message.

Receiving and Reading a Message

When you receive a message(s) a popup window will appear bottom left of the Web edition's screen that looks like the example below. This will indicate how many unread messages you have.



To view the message(s) click the **Open My Messages** link and you will be taken to the Messages Inbox (see example below). From here you can read the message by double clicking on it from the **Inbox**. Once in the message you can also view the linked patient in the reference section. Alternatively, you can click **Snooze Reminder** button and set a time or date to view the message later. If you no longer require the message, you can click the **Delete** button and this will put the message into the Recycle Bin.



[1] **New Message** – Creates a new message.

[2] **Refresh** – Refreshes the Message Grid to view new messages that have come in.

[3] **Search** – Allows you to search on both the sender of a message and their contents.

[4] **Message Grid** – Displays a preview of messages received, sent and deleted. You can view the message in full by just double clicking on the message. You can also reply or snooze the reminder while in the message as well.

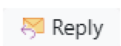
[5] **Settings (Empty Recylce Bin when logging off)** – If you expand the **Settings,** you can enable the option to empty the recycle bin of any deleted messages automatically on logging out of the Web edition.

[6] **Settings (Empty Recycle Bin now..)** – Under the settings you can click this option to empty the recycle bin now as a one off.

[7] **Settings (Purge old messages now..)** – You can select to purge messages that are older than 1, 2 ,3 or 6 months or that are older than 1 year. This will delete messages in your inbox, sent or recycle bin that are older than what you have specified.

[8] **View** – Allows you to change the messages you are viewing between the **Inbox** (received messages), **Sent Message** and **Recycle Bin**.

Replying to a Message

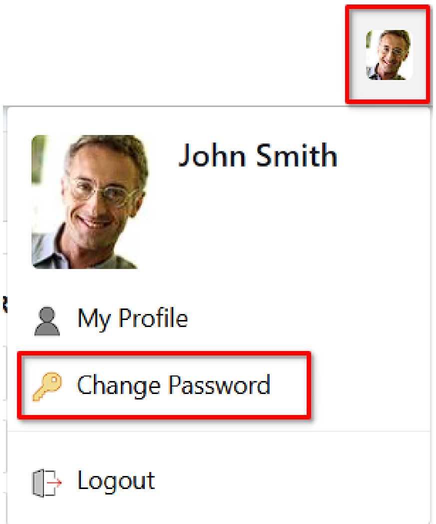
After you have opened a message, you can click the 

button to reply to the message. This will take you to the "Send Message" window mentioned further up and will contain the contents from the previously received message. If the message had a patient linked to it, then this link will be automatically pulled across.

Changing Your Password

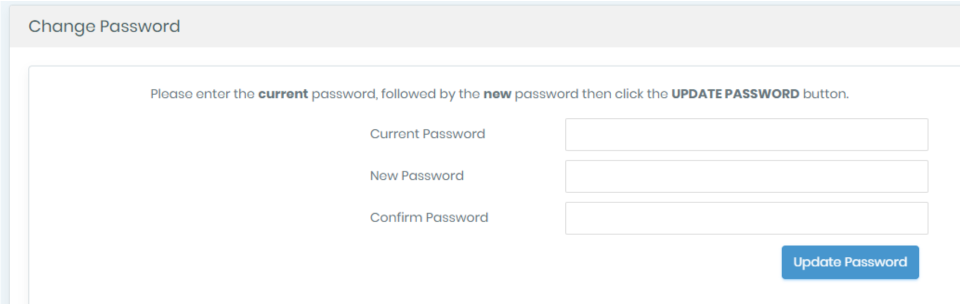
As a Staff Member you can change your password from the Web edition of ClinicOffice.

(1) Go to: **YOUR PROFILE** (Top Right), (2) Select: **Change Password**.
See image RIGHT



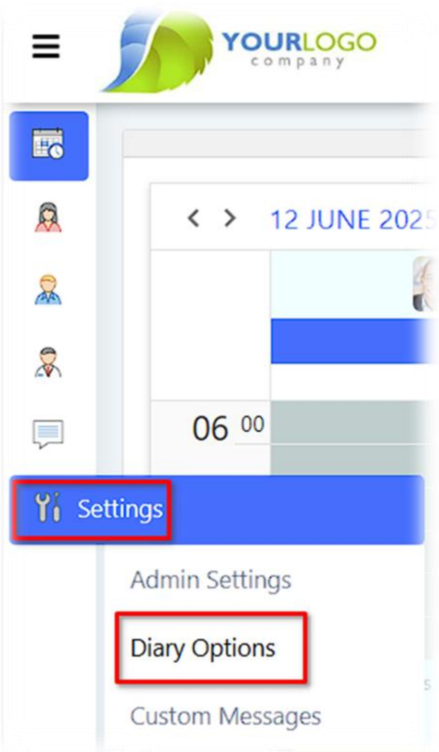
To change your password, fill in the following three fields:

(1) Current Password, (2) New Password and (3) Confirm New Password.
See image BELOW LEFT



Diary Options

Go to: **Settings** (left hand side) > **Diary Options**



When you login as a staff member to ClinicOffice Web you can view the Diary settings by clicking on the small Settings icon on the left-hand side panel and select 'Diary Options'.

General (see image BELOW)

[1] **Time slot intervals** – Set the the time intervals that you wish to view the diary in. Usually best to set this to the lowest denominator. For example, if you have an appointment type that is 15 minutes and another one for 30 minutes, then you would set your time interval to 15 minutes.

[2] **Visible time range** – Allows you to define what time period you can see within the diary.

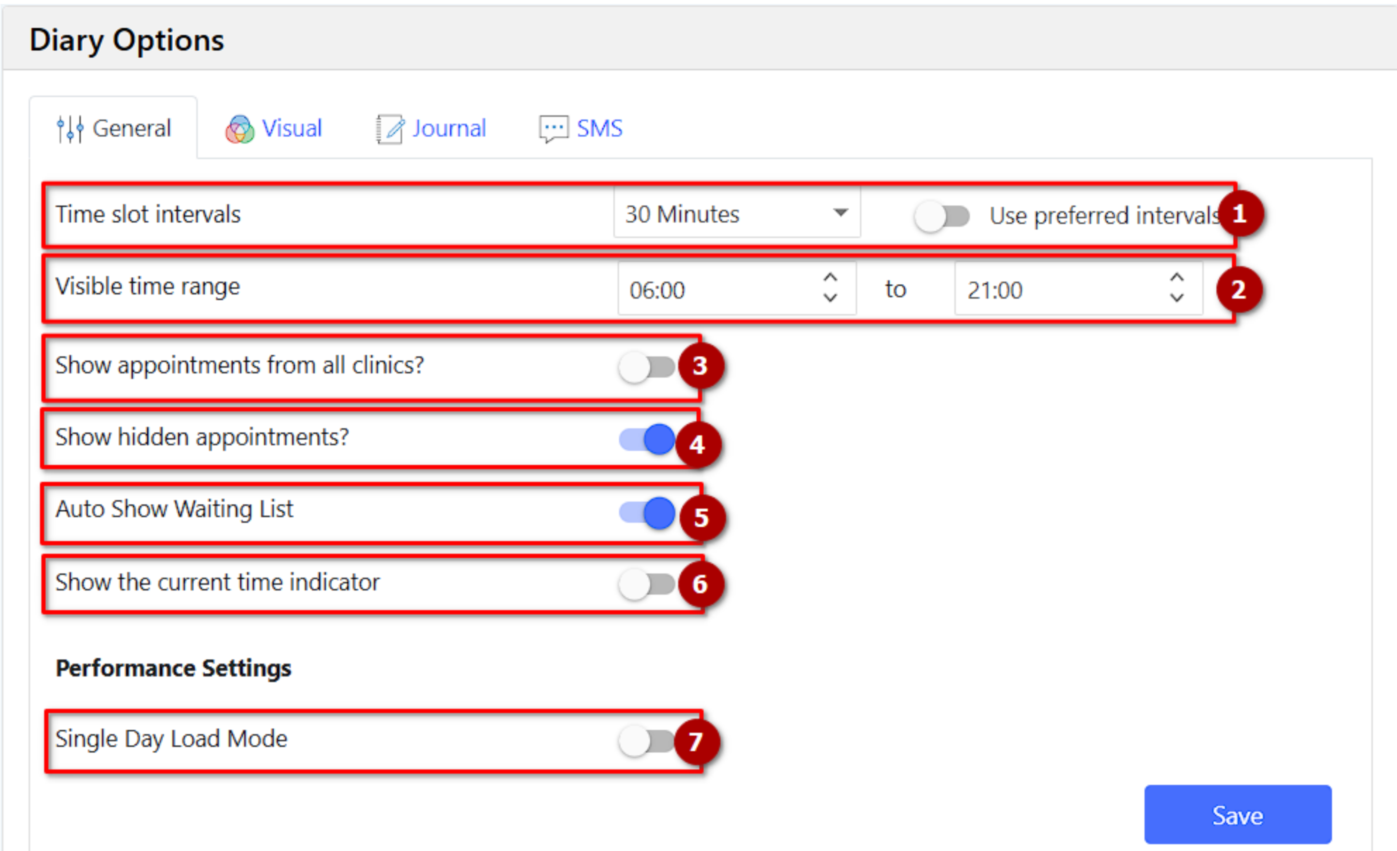
[3] **Show appointments from all Clinics** – will display all appointments for that practitionr or room on any clinic these are assigned to regardless of which Clinic the appointment is booked at.

[4] **Show hidden appointments?** – when enable all appointments will show including appointments marked marked to be hidden, such as cancelled appointments.

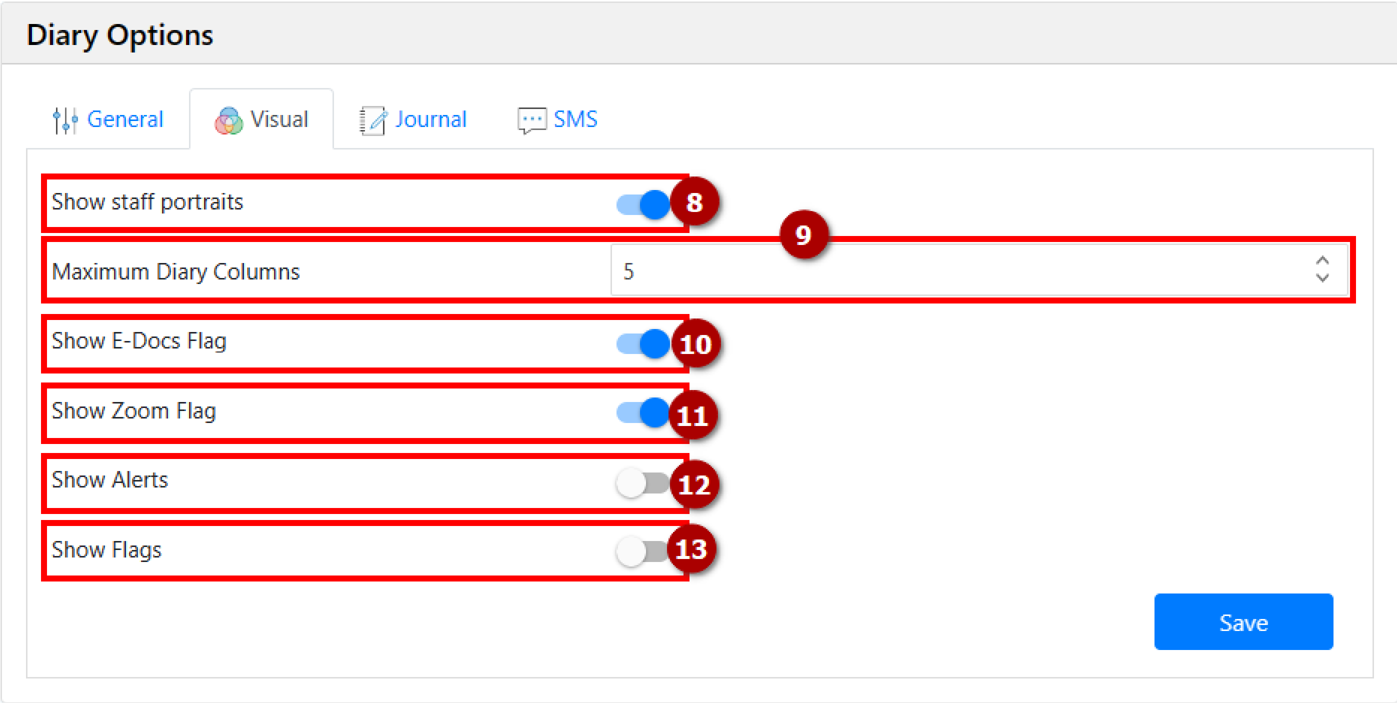
[5] **Auto Show Waiting List** – when enabled, if an appointment is cancelled in the diary then the waiting list will automatically appear with people who are waiting for an appointment to fill this gap.

[6] **Show the current time indicator** - will display a marking line on the diary to indicate the current time of day.

[7] **Single Day Load Mode** - will change the web diary from loading up an entire month to just a single day. This may help improve performance on lower end devices or a slow internet connection.



Visual Settings



[8] **Show Staff Portraits** - when ticked displays the staff member's portrait if they have one.

[9] **Maximum Diary Columns** - this will limit the amount of columns that are displayed on the diary at once. A horizontal scroll bar will appear when the amount of staff members or rooms exceeds this limt.

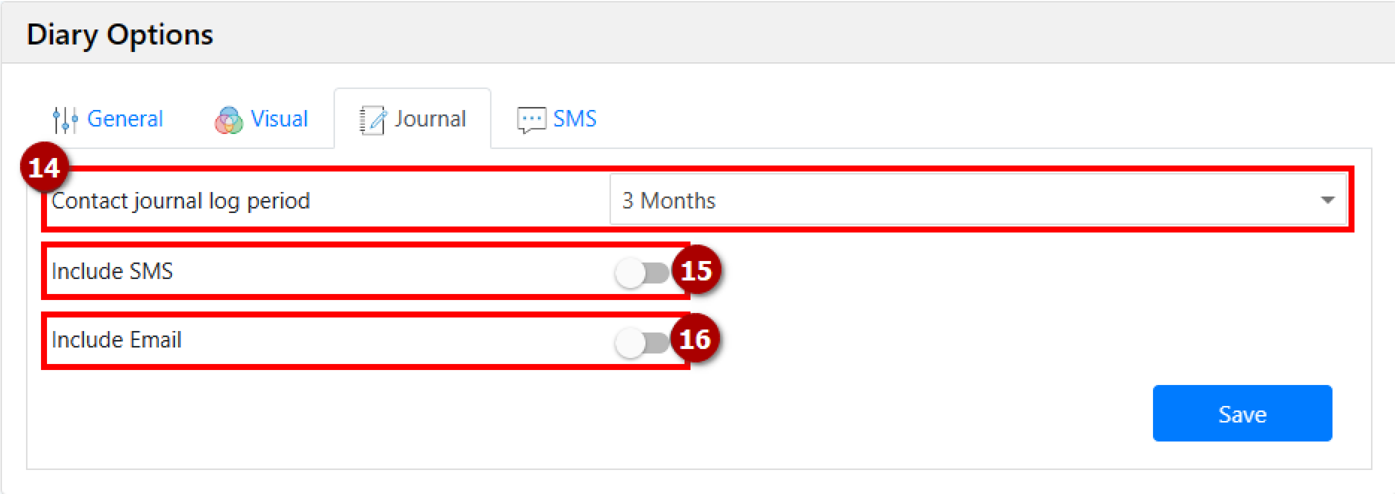
[10] **Show E-Docs Flag** - allows you to show/hide the visual appointment caption icon respresenting E-Doc satus for that appointment.

[11] **Show Zoom Flag** - allows you to show/hide the visual appointment caption icon respresenting Zoom meeting created satus for that appointment.

[12] **Show Alerts** - allows you to show/hide the visual appointment caption icon respresenting Alert satus for that appointment.

[13] **Show Flags** - allows you to show/hide the visual appointment caption icon respresenting Flag satus for that appointment.

Journal Settings



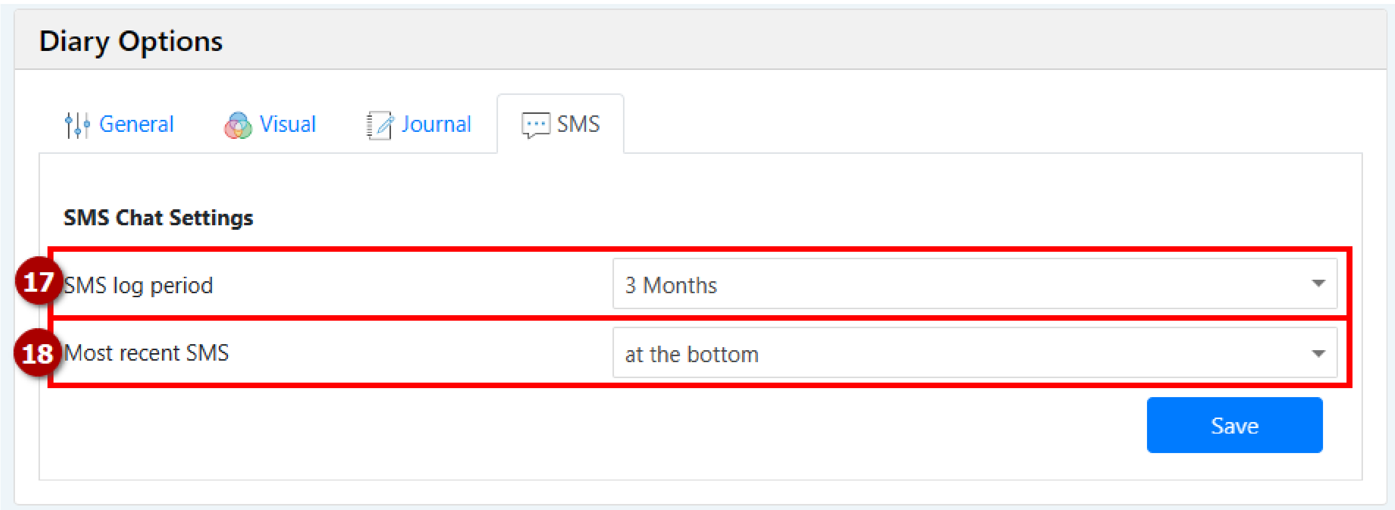
[14] **Contact Journal Log Period** - gives you the option to set the historical time period amount that you want to be loaded in for the patients contact journal.

[15] **Include SMS** - allows you to show/hide SMS logs from the contact journal.

[16] **Include Email** - allows you to show/hide Email logs from the contact journal.

SMS Settings

This section pertains to the SMS section for the diary's patients.



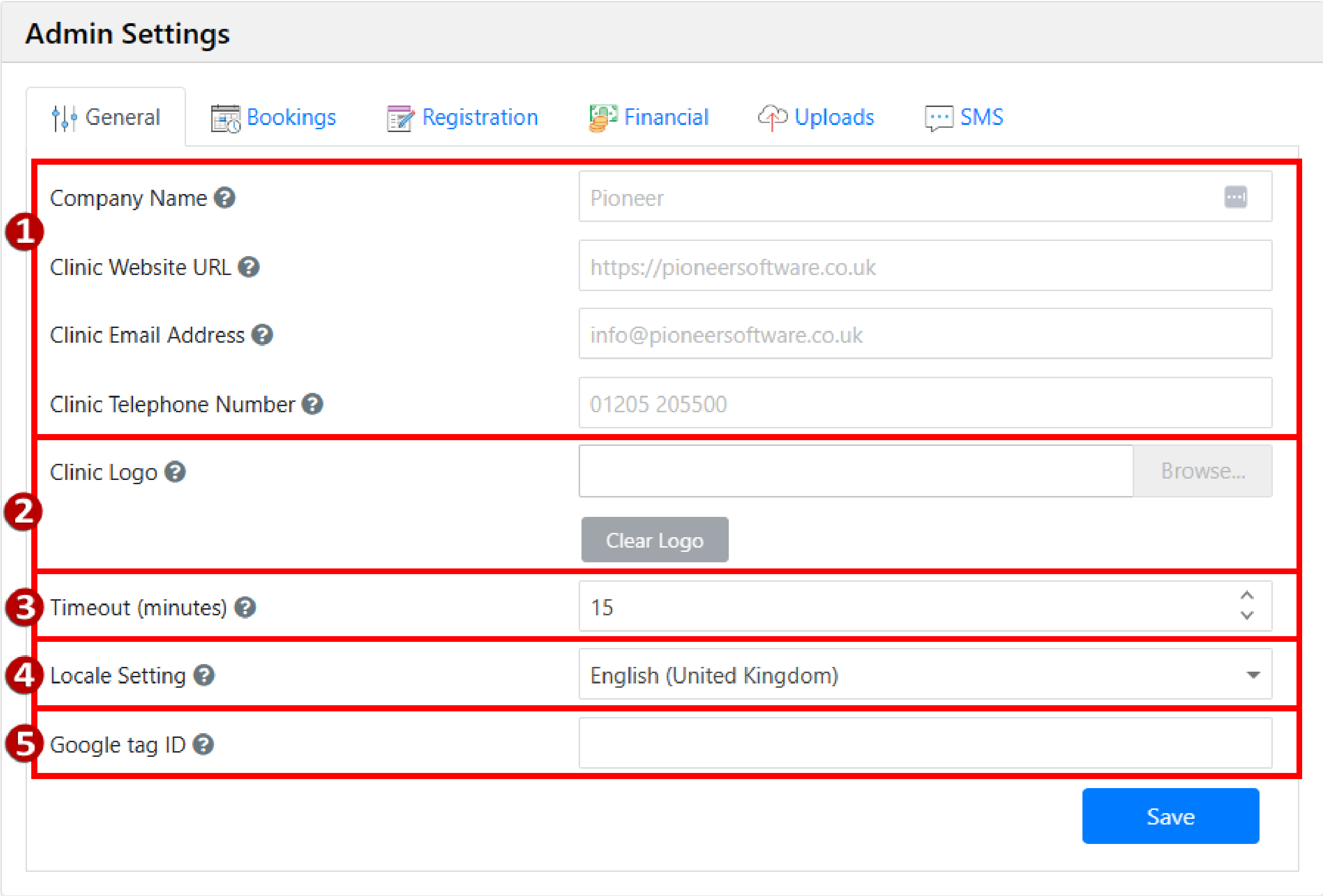
[17] **SMS log period** – Specify how far back you wish to view SMS within the patient's record SMS tab.

[18] **Most recent SMS** – set whether the latest SMS should be at the top or bottom of the patient's SMS tab.

'Save' will save your Diary Options. If you do not click this after making changes then those changes will not be saved.

Admin Settings

Go to: **Staff Diary** > **Settings** > **Admin Settings**



See image above

[1] **General**: Change basic settings for your Web Diary such as the Company Name and contact information.

NOTE the '**Clinic Email Address**' is used to CC Emails (sent to patients) to the Clinic. Please ensure this is correctly set so you will be informed of any patient bookings online.

[2] From here you can set the logo that appears at the top of the Web edition and Patient Booking system. To do this, click **Browse** to locate an image on your computer to use as your preferred logo. Click the **Clear Logo** button if you wish to remove the logo you have uploaded.

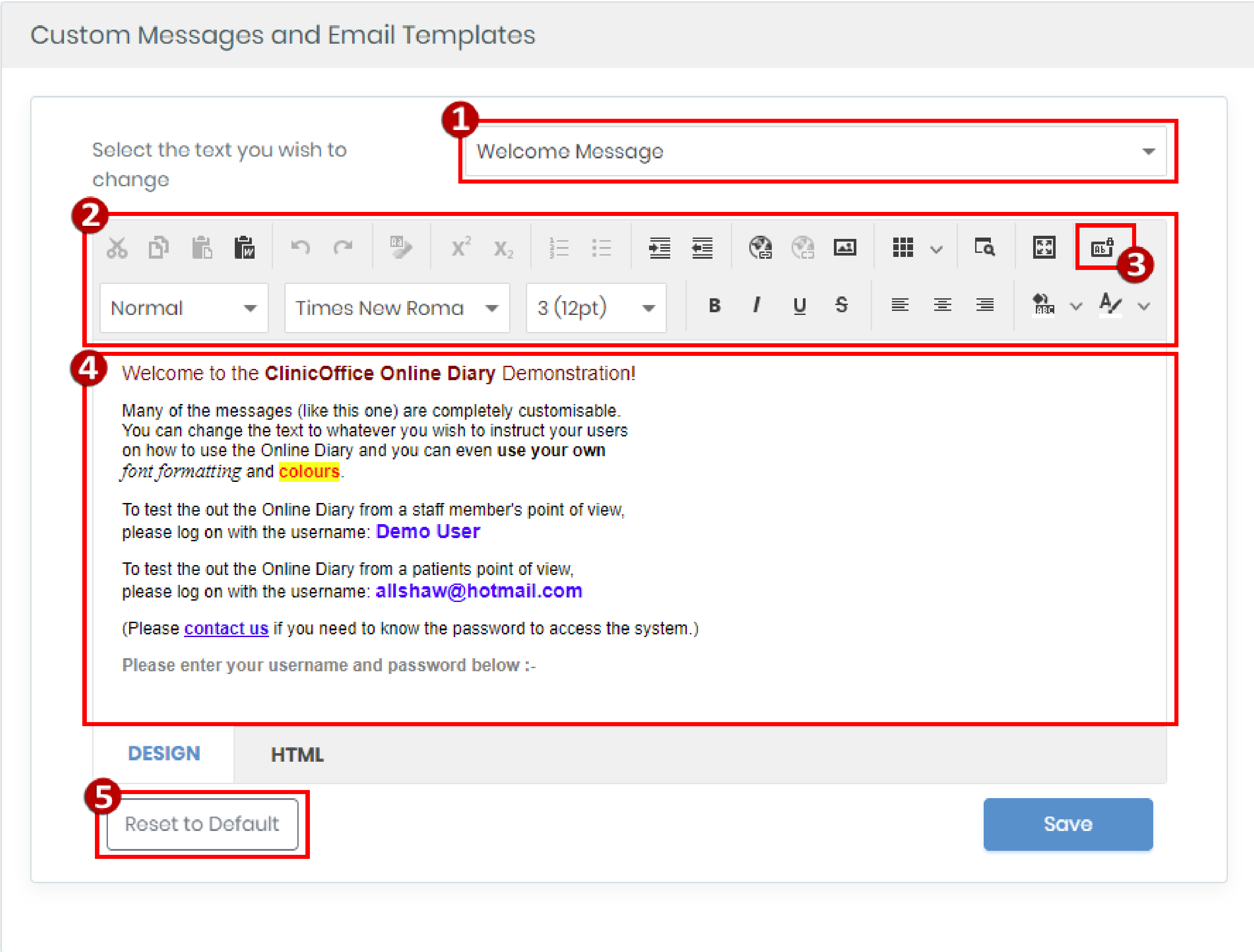
[3] Users are logged out after a period of inactivitiy, from here you can specify that time period. The limit to how long an inactive session will stay logged in is 1 hour (60 minutes).

[4] Through the **Locale Setting** field you can specify your clinic's location. This will change things such as the date formatting on the diary and the currency based on this setting.

[5] The Google tag ID allows you set your Google tag integration for things such as Google Analytics.

Custom Messages

Go to: **Staff Diary** > **Settings** > **Custom Messages**



Custom Messages and Email Templates. Here you can customise emails and messages that are sent from the ClinicOffice Web service. 'Msg' / 'Message' screens are aspects of the webpages (such as the Welcome screen or the Booking success page) that are customisable with full font formatting. The Emails sent from the Web edition to Patients are also customisable. There are already defaults in place, so you don't need to set each one up initially if you don't want to.

[1] Allows you to select different messages or email templates to edit. If you select an email template then an additional drop down field will appear that will contain the "**Email Subject**" as well.

[2] There are many HTML text controls in this editor, including sizing options, fonts, colours, alignment etc.

[3] **Insert Placeholder** gives you a range of merge fields that automatically pulls in data from your database.

[4] Your custom message goes here. This is what your ClinicOffice Web users will either see on the diary interface or will be emailed with.

[5] Reset to Default reverts the template to the original default message. This cannot be undone.

SUPPORT INFORMATION

Call Our Helpdesk 01205 205500

Email us support@pioneersoftware.co.uk

USEFUL LINKS

ClinicOffice Online Service Overview

Online Patient Booking Guide

Online Web Demonstation – Try it for yourself!