



CFPM Office Management System

Quick Start Guide

Developed by:



TABLE OF CONTENTS

- Table of Contents 2
- Login 3
- General Notes 3
- Employees (Users) 3
- Clinic Setup 3
- Add Practitioners 3
- Add Products / Services 5
- Add Patients 5
- Schedule Appointments 5
- Manage Appointments 6
- Create Invoices 6
- Maintenance 7

LOGIN

The system requires you to login by default an Admin user without a password is included. To login simply select the Admin user and do not enter a password.

GENERAL NOTES

The menubar along the top of the screen will allow you to access all of the functionality of the CFPM Office Management System. Alternatively, the most common tasks can be accessed by clicking the associated button on the Main Switchboard. This Quick Start Guide will be using the menubar to help familiarize you with its usage.

The **Maintenance** menu contains tasks that are not performed often, such as editing the lists that appear in dropdown boxes. The **Functions** menu contains many of the tasks that you will be performing on a day to day basis, such as scheduling appointments and creating invoices.

EMPLOYEES (USERS)

First update default admin user used to login. From the menubar select **Maintenance | Clinic | Employees | Employee –Find** and click the “...” (Quicklink) button beside the Admin employee. The employee form will open and allow you to edit the first and last name of the Admin user and add a password.

To add additional employees go to **Maintenance | Clinic | Employees | Employee –New**. Enter at least a first name and last name. Employee records can be Administrators or Employees. Administrators have the ability add/edit employee records and edit passwords.

CLINIC SETUP

Before using the system you will need to setup the clinic information. From the menubar select **Maintenance | Clinic | Clinic Setup**. This window is where you can enter the clinic’s address, phone numbers, email address, website and other information. You can also enter a note that you want to appear at the bottom of every invoice. The information used for exporting your data to your accounting package is also setup here.

ADD PRACTITIONERS

Next you will need to add all of the practitioners who work at the clinic. From the menubar select **Maintenance | Clinic | Practitioner**. To edit a practitioner record click the Quicklink button beside the practitioner record you would like to open. To add a new practitioner simply click the ‘Create New Practitioner’ button.

Each practitioner will need a unique practitioner code (such as 001 or their initials).

After the practitioners have been added to the system, you will need to setup their typical work schedules. From the menubar select **Maintenance | Clinic | Schedule | Schedule Setup**. Now select a practitioner from the dropdown box on the Schedule Setup window to make their weekly schedule appear. Click on the Quicklink button of a day that you'd like to schedule the practitioner on.

The Schedule Setup Details window will appear allowing you to enter the start time, end time, time interval and optional type to schedule for the selected day.

The Interval is expressed in minutes and affects the way the appointment schedule is displayed. For example, an interval of 15 would break the appointment schedule into 15 minute blocks.

The type will allow you to colour code blocks of time during the day. This feature can be used as a reminder of the types of appointments that should be booked at certain times of the day. For example:

Start Time	End Time	Interval	Type
8:00am	10:00am	15	White
10:15am	12:00pm	15	Blue
12:00pm	5:00pm	15	Green

Exceptions for specific dates can also be setup. From the menubar select **Maintenance | Clinic | Schedule | Schedule Setup Exceptions**. After selecting a practitioner from the dropdown box you can enter start times, end times and intervals just as you did for the weekly schedule except that this schedule will only apply to a specific date rather than every week.

ADD PRODUCTS / SERVICES

Next you will need to add all of the products and services offered by the clinic. Before adding a product or service you should check to see if it already exists in the system. From the menubar select **Functions | Product / Service | Product / Service – Find**. The boxes at the top of the Product / Service Find window allow you to filter which products and services are displayed. Clicking on the “. . .” (Quicklink) button of a particular product or service will open the Products / Services window which will allow you to edit the details of that product or service.

If the product or service that you'd like to add does not already exist in the system then you can add one by selecting **Functions | Product / Service | Product / Service – New** from the menubar. The Products / Services window will open to a new record, allowing you to enter the product or services information.

There are 3 types to choose from: Products, Services and Combinations. Products have suppliers and track inventory levels. Services can be scheduled along with appointments. Combinations are groups of products where the inventory levels of all the products in the group will be reduced whenever the combination is sold. Your initial inventory levels can be setup using the **Inventory Reconciliation** functionality. Future inventory purchases can be done using the **Purchase Order** functionality.

ADD PATIENTS

Before adding a patient you should check to see if they already exist in the system. From the menubar select **Functions | Patient | Patient – Find**. The boxes at the top of the Patient Find window allow you to filter which patients are displayed. The first and last name filters allow filtering on partial text. So, for example, if you wanted to know if patient John Smith already exists in the system you could type 'smith' in the last name field and 'j' in the first name field. Now when you click on the Filter button only patients whose last name begins with "Smith" and first name begins with 'j' will appear, allowing you to easily determine whether or not John Smith has already been added to the system. Clicking on the “. . .” (Quicklink) button of a particular patient will open the Patient window which will allow you to edit that patient's information.

If the patient does not already exist in the system then you can add them by selecting **Functions | Patient | Patient – New** from the menubar. The Patient window will open to a new record, allowing you to enter the patient's information.

SCHEDULE APPOINTMENTS

The system is now ready to schedule appointments. There are two options for viewing the schedule: Multiple Practitioner and Multiple Day. The Multiple Practitioner schedule can be accessed by selecting **Functions | Schedule | Schedule** from the menubar. The Multi-Practitioner Schedule window will allow you to view the schedule for multiple practitioners one day at a time. This is useful for when it does not matter which practitioner a patient visits so that more appointment time options are available. However, if a patient needs to visit a particular practitioner then the Multiple Day schedule is more appropriate. The Multiple Day schedule can be accessed by selecting **Functions | Schedule | Schedule Multi-Day** from the menubar. The Multi-Day Schedule window allows you to view the schedule for a single practitioner over multiple days.

Both schedule windows provide the same information and function in the same way. The practitioner dropdown boxes are used to select which practitioner's schedules are displayed. The dates being displayed can be changed by manually entering a date, by clicking the calendar button and then selecting a date or by clicking the left and right arrow buttons found near the calendar button.

After you have selected the practitioner and date, all of the time slots setup in the Practitioner Schedule will be displayed. To schedule a new appointment double click on the time that you'd like the appointment to begin. This will open the Schedule Input window where you can select the patient and service to make an appointment for. When you're done, close the Schedule Input window and you'll see the new appointment appear in the schedule.

MANAGE APPOINTMENTS

After an appointment is initially created, it will appear on the schedule in black. Clicking the "R" button at the bottom of the schedule indicates that the patient has been reminded of the appointment and changes the appointment's colour to red. Clicking the "C" button cancels the appointment and removes it from the schedule. Clicking the "NS" button indicates that the patient was a No Show for the appointment and changes the appointment colour to green. You will also be asked if you'd like to create an invoice for the missed appointment. Clicking the "A" button or the "AL" button indicates that the patient has Arrived or Arrived Late and changes the appointment colour to purple. All past appointments where the patient cancelled or arrived late can be viewed from the "Cancelled Appts" tab of the Patient window. You can edit the details of an existing appointment by double clicking on the appointment time.

CREATE INVOICES

You can transfer an invoice from the Schedule window by clicking on the appointment that you'd like to create an invoice for and then clicking on the "T" button at the bottom of the schedule. This will bring up the Invoice window with much of the information from the appointment already filled in. Enter any additional information or add any additional products to the invoice and then click the "\$" button to complete the invoice. Alternatively, you can open the Invoice window without an appointment by selecting **Functions | Invoice | Invoices – New** from the menubar; however, all of the information will need to be manually entered.

You can now accept payment for the invoice by click the "Pay" button. From the Payment window that pops up, select a Payment Method, the Invoices that you'd like to make payments against and the amounts of the payments. You can print a receipt using the Print and Preview buttons in the bottom left corner of the Payments window. When you close the Payment window the amounts will be paid against the amounts owing on the invoices.

You can print a copy of the invoice using the Print and Preview buttons in the bottom left corner of the Invoices window. Before closing the Invoice window, you will need to select a follow-up type.

If you need to accept payment on a previous invoice, then you can select **Functions | Payments | Payments – New** from the menubar. If the payment is from an insurance company then select **Functions | Payments | Payments – Insurance** from the menubar. The process is essentially the same as making a payment from the Invoice window except that you will have to manually select the patient and invoice.

MAINTENANCE

Occasionally, you will receive the messages that your data should be compacted. This process simply improves the performance of your system and scans for data errors.