TM2

PRACTICE MANAGEMENT SOLUTIONS

User Guide

For TM2 Practice Management and TM2 Touch

TM2 version 2015

User Guide Version 2015

Contents

Setting Up Your TM2 System, BUPA Reporting

When you first install TM2 in your practice, there are lots of details you need to set up in the system such as:

→ Your practitioner's working hours.

→ The price, duration and description of the appointments you offer.

→ Any physical stock items you sell.

→ The insurance companies you deal with.

TM2 Setup for Smaller Practices

If you are a small 1-2 practitioner practice, you will find it easiest to enter these details using the Quick Start wizard which you are presented with when you first run TM2.

You can access this at any time you are using TM2 from the Tools menu:

Tools -> Quick Start

TM2 Setup for Larger Practices

If you are a larger practice, you are likely to have more specific details to enter and you will be best to follow the more detailed instructions set out in the separate "TM2 Setup and Management Guide" document.

Setup and Use of TM2 for BUPA Contract Reporting

There are some specific requirements in your use of TM2 for the automatic BUPA contract reporting to work correctly. These topics are shown using the BUPA icon. This report can also be used for other groups that you work with, not just BUPA, and provides very useful information.

More details are found in the following areas of this guide:

→ Setup of Medical Contacts (p18)

→ Recording Complaint and Patient Survey activity (p19)

→ Use of correct appointment descriptions (p27)

→ Use of Case tracking (p29)

→ Recording Admission data (p71)

→ Recording Discharge data (p80 and p81)

Please note that even if you are not planning to use TM2 Touch to record all your clinical notes, the BUPA report does require that you create TM2 Case records and enter some key data on the Admission and Discharge screens.

Further details for setting up BUPA report related features and accessing the report are described in the TM2 Setup and Management Guide.

Connecting to TM2 Hosted

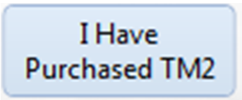
PLEASE NOTE THE STEPS ON THIS PAGE ARE ONLY NECESSARY IF YOU USE TM2 HOSTED. IF NOT, PLEASE SKIP TO THE NEXT PAGE.

If you have purchased the TM2 Hosted system, then your data will be stored on TM2's data server rather than on a machine in your own practice.

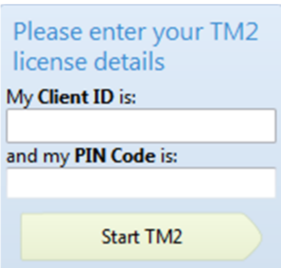
Step 1 – Connect to TM2 for the 1st Time

You will have an icon on your computer desktop as shown here.

- Double Click on The **"TM2"** icon



- Select on **"I Have Purchased TM2"**



- Type in your **Client ID:**
- Type in your **PIN Code:**

Note: This will be supplied to you by TM2

Once you have completed these steps you will no longer need to enter in these details every time you log on. TM2 will just require your Username and Password

Logging In and Out of TM2

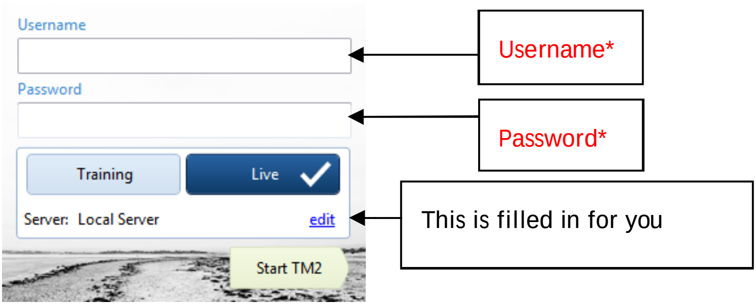
Starting TM2

Click on the TM2 icon on your desktop or Windows Start menu.

Logging In

When you log into TM2 you have to specify your user name and password.

Enter your own login details here:



*Contained In your TM2 Welcome Pack

Edit – By clicking edit, this will contain the database and server location – Note:

Hosted – Once the client ID and PIN are entered this will pre populate the database and server address ***e.g. 10.95.0.1,1234***

Local Server – Once the client ID and PIN are entered this will pre populate the database and server address e.g. ***YourComputerName\bluezinc***

Logging Out

It is very important that you log out of TM2 when you are not using the system. This is because TM2 is licensed by the number of users who can log into the system at the same time. If you are logged in when you are not using TM2 you may be preventing someone else from using the software.

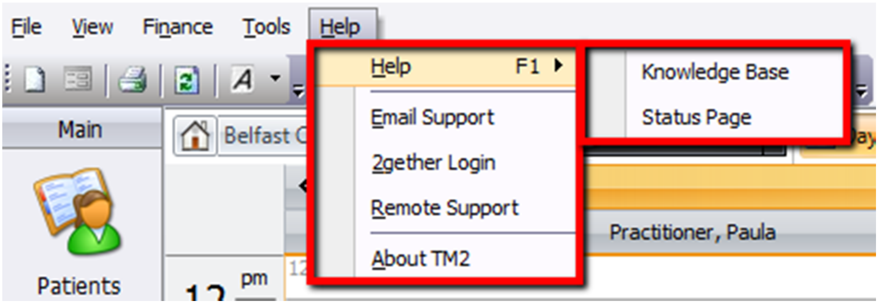
To log out, click on the icon shown below which is at the top of the TM2 display:

You should always log out at the end of each day.

Getting Help

Getting Help in TM2

TM2 2gether and TM2 Help files have now been made accessible from the TM2 application for your convenience.



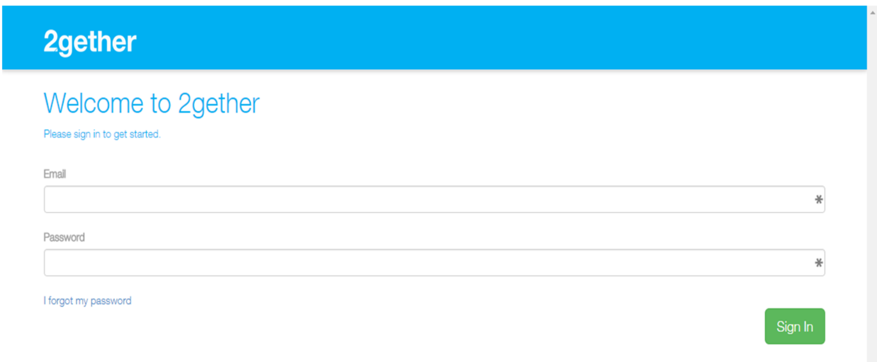
This also includes a link to the TM2 status and TM2 Remote Support Pages

2Gether

TM2 > HELP > 2gether Login

Selecting this option will open a link to the 2gether Login page via your web browser. Here you can log queries to the support team, participate in online forums and access TM2 training videos.

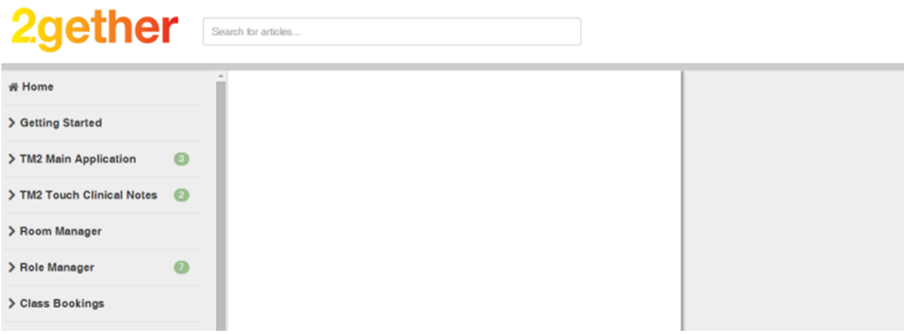
(You will have received your login and welcome email to 2gether when signing up)



Knowledge Base

TM2 > HELP > HELP > KNOWLEDGE BASE

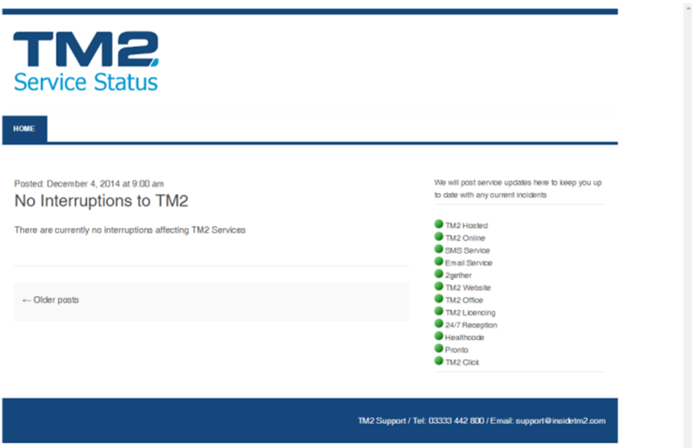
Selecting this option opens a link to the 2gether Knowledge Base via your web browser. From here you can learn about new features or simply use it as a training tool. The knowledge base has been put together by our Support team who are TM2 Experts.



Status Page

TM2 > HELP > HELP > STATUS PAGE

Selecting this option open a link to the TM2 Service status page via your web browser. The TM2 Service Status page will report any disruptions in any TM2 services.



Patient Records

Patient Records

To Access Patient Records

Main – Patient View

Use the search functions to find the required patient

Double click on the patient's entry.

Click on throughout TM2 to access the patient record.

Using Search Functions

If you cannot seem to find the right person:

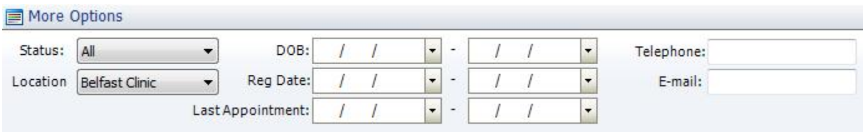
→ Try using just the first few letters of their name: it could be their name is spelled differently, e.g. Allan instead of Allen.

→ Press [Clear] first: it could be there are some other search criteria left in another field.

→ Try different criteria such as postcode.

It is very important that you use search correctly and do not create duplicate records in your patient database.

There are additional search options found by opening the "More Options" area:



You can use the [Tab] key to move between search fields and [Enter] to start the search.

To Create a New Patient

Click on icon – on left hand side of top icon strip:

Saving and Exiting a Patient Record

Press [F4] on the keyboard – saves and exits

[Update] – save and continue editing

[Close] – Exit without saving

Patient Record – General Fields

Field Name	Generally Used For	Use in Our Practice
Name, Address etc.	Name and contact details. Use icon to copy name/address to clipboard. "Alternate Address" tab allows separate address to be listed and used when selected.	
Reference	Unique reference number for each patient. Automatically generated when new patient created but can be overridden.	
Reg Date	Date they registered as a patient.	
Status	Current – a patient you still consider a customer of your practice. Non-Current – a patient you no longer consider a customer of your practice.	
Location	(If you use more than one "location" in TM2...) The clinic location the patient most regularly attends.	
Phone numbers	It is mandatory to have at least one of the three numbers entered. Use 0 if number not currently known.	
Email	This can be used for appointment reminders and notification of cancellations. Click the icon to send them an email.	
Picture	Capture or import a picture of the patient	
Alert	Bring this patient to your attention. Places icon against patient in patient and diary views.	
Enable Online Bookings	(If you have TM2 Online...) Enable this patient to book online.	
Enable SMS Text Messaging	Enable patient for SMS Text Messaging and Reminders	
Date of Birth	Date of birth	

Height, Weight	Height, weight. Works out Body Mass Index.	
Patient Group	Private Patient means they pay themselves at standard rates. Select a specific Patient Group for membership of: - Insurance Company - Local company you contract with - Sports clubs, etc. The definition of the group will determine whether the patient or the group is to be invoiced and at what rates.	
Charge Group	If a specific Patient Group is selected… Whether the default appointment charges are those of the group or the practitioner.	
Group Reference	Group Reference number for the group they are a member of. Appears on invoices to the group.	
Invoice Period	If the patient pays, should they pay: - Immediately (at end of appt) - Monthly (monthly invoice run) - Ad Hoc (non monthly invoice run)	
Hospital Code	Field not regularly used. Field name may be customised.	
Policy Number	Policy Number for the group they are a member of. Appears on invoices to the group.	
NI Number	Field not regularly used. Field name may be customised.	
Enquiry	How they heard of your practice.	
Occupation	Their job category.	
Employer	Their employer. Field name may be customised.	
Practitioner	The practitioner they most commonly see. Required field.	
Consent	Whether consent form has been signed.	

Patient Record – Additional Fields (1)

Associate Medical Contact with Patient

Patient Form, Contacts tab

[Add]

Use Search functions to find medical contact

Select required contact, [Use This Contact]

Set the medical contact you will most commonly send letter to as the Default.

Medical contacts (GPs, consultants etc.) are recorded within the Medical contacts area of TM2. The creation and updating of these is quite self-explanatory and similar to the management of patient records.

Note that for correct operation of the BUPA report, the Category field of a Medical contact must be appropriately set to “G.P.” or “Consultant”.

Viewing Case History

If your practice captures clinical notes using TM2 then you can see a list of previous case (episodes) for a patient:

Patient Form, Case History tab

Depending on your access rights, you may not be able to open the actual case notes.

Viewing Appointments

All appointments can be seen on the Appointments tab.

Patient Form, Appointments tab

Management of Authorisation Codes

Insurance company authorisation codes can be managed in TM2 via data stored in the Authorisation Codes tab. Please see page 38 for more details about how to do this.

Recording Activity – Notes, Logs and Tasks

TM2 allows you to record on-going details of administrative communication with a patient through three different areas:

→ **Information Notes** – where more detailed information can be recorded which you may want to reference as you deal with this patient.

→ **Patient Log** – a simple, one-line record of communication and activity with regard to this patient. Typically information you only reference to check that something previously happened, when it happened and who did it.

To record the fact that a complaint has been received or a satisfaction survey carried out, create a Patient Log entry and click the "Complaint" or "Satisfaction Survey" button. This must be dated between the admission and discharge dates for the patient.

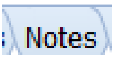
→ **Tasks** – where you record an activity that needs to be done for a patient by someone in the practice.

Information Notes

Patients, Groups, Practitioners and Medical contacts all have the facility to accommodate additional notes within their record**.**

Open the record you wish to add a note to.

- Select tab **[Notes]**
- Click on **[Add]**



- The window **"Information -Edit Note"** will appear

In this window there are several options

- **[Create] -** Type into the space provided, press create to make the **note.**
- **[Cancel] -** Cancel making the note
- **[Locking]**

[Don't Lock] - Everyone accessing this record can see the record note.

1.1.1 **[To Me] -** Only the user who created the record can see the record note.

1.1.2 **[To this Location] -** Anyone with permission to access the same location as the creator can view the note

1.1.3 **[To This Role] -** Anyone with the same user role permissions as the creator can view the note

[Alert] - Note will appear in red to show a severity level.

Tasks

To create a task that is to be done for a specific patient:

- **Patient Form, click on <u>Create Task</u>** (in bottom right hand corner)
- **Enter details of task, date due, who is to do it, priority and reminder**
- **[Create]**

The task then appears in the Task list for that user of TM2. To view your tasks:

- **Click on the "My Work" tab at the bottom of the main TM2 window.**

If there is a more complex series of individual activities that need performing, these can be set up by your TM2 administrator as a "To Do" list.

Adding Alerts to Records in TM2

TM2 allows you to capture multiple alerts against patients, practitioners, groups and cases with full descriptions, plus the ability to force users to acknowledge the alerts before accessing the records.

- To do this, access the record you wish to add the alert on and click on: The Create Alert icon (Create Alert)

Clicking the icon will open the "**Alert Options**" window.

There are a number of fields for creating an Alert on the record:

- **Title -** This is the detail that will appear at the top of the alert.
- **Notes -** Any additional detail that will appear below the title.
- **Starts - [Now]** (alert effective immediately) or **[On Date]** (alert will appear after an assigned date)
- **For -** This defines who the Alert will appear for based on the TM2 User it is assigned to. You have 3 options for this **[Everyone]** (all TM2 users), **[Me]** (the user you are currently logged in with) or **[Another User]** (select a specific user from the menu).

You can then select some additional options using the tick boxes.

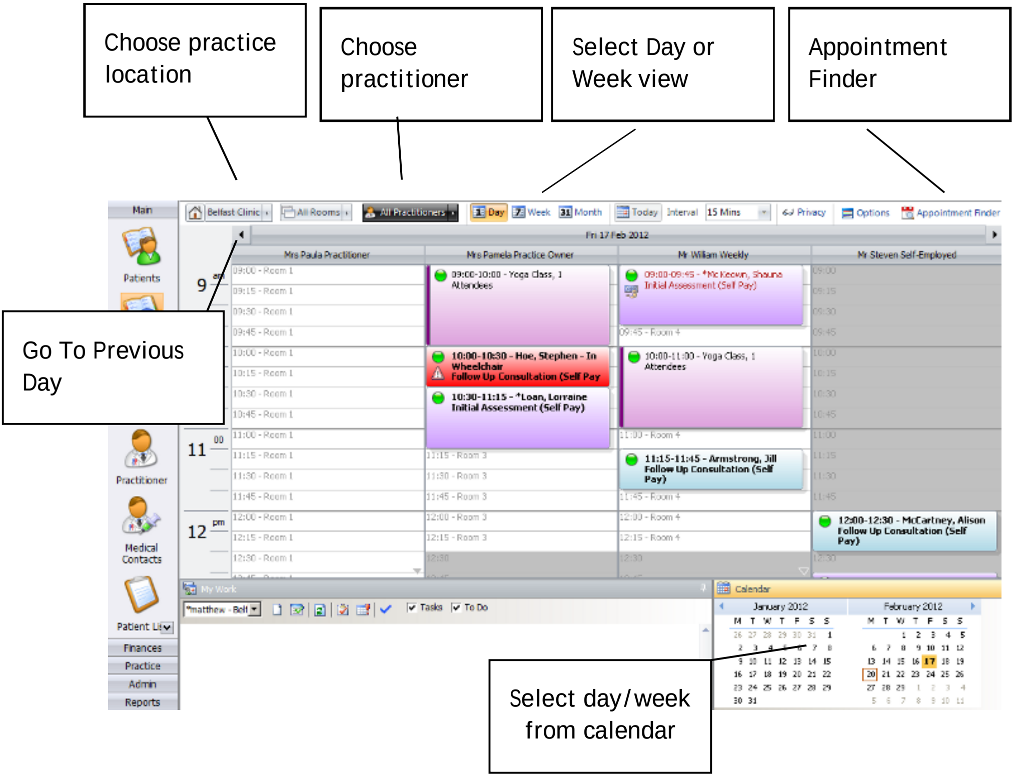
- **User must acknowledge this alert each time record is accessed -** Forces the alert to appear and the user to click "Acknowledge" when accessing the record.
- **Create a task -** this will add a task based on the Alert title to the My Work section.

When these options have been selected click **[Create]** or to exit the Alert Details window click **[Close]**

The Diary

Navigating Around the Diary (1)

The main functions to navigate around the diary are shown below:



Other diary navigation functions are:

- **Diary Zoom** (bottom right hand corner)
  Zooms in and out via three levels: small, medium, large
- **Interval** (top row of icons)
  Sets the size in minutes of each time slot displayed. Set this to the smallest common denominator of your appointment times.
- **Scroll bar** (right hand side) - scrolls up and down.
- **Mouse scroll key**
  Also scrolls up and down if you first click in the diary display.

Diary Display Options

Hiding Patient Names

If your patient is able to see the diary display then you to maintain confidentiality you can hide the names of the patients in the diary:

- **[Privacy] button –** shows and hides the patient's name

[Options] button

Click on the Options button:

- **[Options] button**

This brings up the Options menu from which you can set various diary display options. Note that these are set on a per user basis and should remain set to the same values between times that a user logs into the system.

(Close the Options menu with the "X" in the upper right hand side when finished.)

- **[Colours section] -** Change colours of various diary elements.
- **[Reorder Practitioners] –** Change the left to right order in which the practitioner columns appear on the diary page.
- **Modify the information which is displayed on each appointment**

In the General Options section:

- **Show Weekends –** show or hide Saturdays and Sundays in the diary.
- **Auto Hide Practitioners with no sessions -** hide columns for practitioners who have no working sessions or appointments on that day. Tip – best set "on".
- **Show Cancellations –** shows or hides cancelled appointments
  Tip – for receptionists, best set to "off" so a new appointment can be put into the now empty diary slot. Practitioner often like this option left on so they can see who is cancelling appointments.
- **Show Minute Graduations –** shows the minutes for the time slots down the left hand side.
  Tip – best set to "on".
- **Touch Screen Friendly Mode –** hard to explain, but best set to "off".
- **Time Format –** set to 12 or 24 hour as best suits your way of thinking.
- **Diary Ghost Mode –** sets where the times are seen in empty diary slots.
  Tip – best set to "Every Slot".

Changing Individual Appointment Boxes

The colour of an individual appointment box can be changed. This is can be used for example to highlight a patient who has a disability and needs additional help:

- **Right click on {Appointment} -> Change Colour…**

Creating Appointments – The Process

Creating an Appointment from the Patient Record

- **Patient View, search for patient**
- **Right click on {Patient}, select Create Appointment**

  or if the patient record is opened:

  [Create Appointment]
- You are now taken to the diary with the patient's name "under the cursor".

Note at this stage that the "pointer" part of your cursor is the green area of the patient icon.

Navigate around the diary as required

- **Left click in the appropriate diary slot for the start time of the appointment**

  Remember the green area of the icon should be over the required slot.
- **Review options in Diary Event form**

  In most cases this will involve checking: First / Follow-up appointment

  option is set correctly and correct appointment type is displayed.
- **[Create] or press [Enter]**

Creating an Appointment From Within the Diary

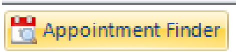
- **Double click in diary cell for the start of the appointment.**
- **[Select Patient], find patient, [Use This Patient]**
- **Review options in Diary Event form (as described above)**
- **[Create] or press [Enter]**

Creating an Appointment from another Appointment

- **Right click on {existing appointment} -> Create Next Appointment**

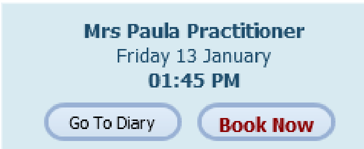
You now have the patient's name "under the cursor" and can follow the procedure described above.

Creating an Appointment Using the Appointment Finder - "Quick Book"

- Select **[Appointment Finder]** 

 (Top Right of Diary View)
- **[Filter Practitioners] -** Searches for a particular Practitioner and their next available time slot enabling a Quick Booking.
- **[Start Search From] -** Displays available Practitioners by Day **[Now] [Tomorrow] [Today Week] [Today Fortnight] [Specific Date]**
- **[At:] -** Displays Available Practitioners by Time **[Anytime] [Morning] [Afternoon] [Evening] [Specific Time]**

When selecting **[Appointment Finder]** TM2 will display the Next available appointment for each Practitioner



[Go to Diary] – Views the Practitioners Diary

[Book Now] – Books an appointment for the time and date displayed for that practitioner

Cancelling Create Appointment

If you want to remove the patient's name from under the cursor:

Press the [Esc] key on the keyboard Creating Appointments – How TM2 Works

How the Default Appointment Type Is Selected

TM2 is very flexible in how you can define an appointment. However the system is designed so that, in the majority of cases, you will not need to make any changes on the diary event form.

The options that are set automatically as you create an appointment include:

→ **First or Follow Up Appointment** – It is possible to use TM2 to track admission through to discharge of a case or episode of treatment. This is tracked using Cases in TM2. If you track cases in this way, TM2 can see if there is an existing open case and automatically set the option for first or follow-up appointment in the third box down on the form.

- → **Appointment Type (Consultancy)** – this is worked out from:
  - → **First / Follow Up appointment**
  - → **If they are a Private Patient –** in which case the first/follow-up appointment type is that defined for the practitioner.
  - → **If they are members of a Patient Group –** in which case the first / follow-up appointment type is usually that defined for the group.
- → **Start and End Date/Time –** is worked out from the time slot you selected for the start time and the length of the appointment selected.

So in many cases no changes are necessary to the Diary Event form options.

When Diary Event Form Changes Are Required

Changes will be needed if:

- → The First/Follow up appointment option is not set correctly.
- → It is the first appointment of a new case and you need to record the body site.
- → The patient has several open cases and you need to select which case this appointment relates to.
- → The patient is having a special appointment which is not the default one offered (e.g. double length, discounted price, etc.).
- → You are using the Auth Code tracking system in TM2 and a new code needs entering or an existing code has expired.

Note that for BUPA physiotherapy patients, you should ensure that the Consultancy type is set to one of the following:

- ➢ **AA360 Initial Musculoskeletal Physiotherapy**
- ➢ **AA361 Follow on Musculoskeletal Physiotherapy**

Creating Appointments – How TM2 Works

Creating a Group Appointment

TM2 also has the feature to create a group appointment

- **Group View, Search Group**
- **Open Group**
- Click on **[Book Appointment]**
- Select from within the diary the desired time slot
- **[Create]**

Creating a Group Appointment within the Diary

- **Right Click on Diary**
- **Select [New Group Appointment]**
- **[Create]**

Note: In order to book group appointments, it first must be set up in TM2 options

- **Tools**
- **TM2 Options**
- **Advanced Settings**
- **Diary**
- **Allow Groups To Book Slots in Diary = True**
- **Save**

Appointment Options – With TM2 Case Tracking

Note that if you are part of the BUPA contract then you must set up your TM2 system with Case Tracking turned on. This ensures that Case records are created which are used to store information BUPA require.

When Using TM2 Cases – First Appointment of New Case

If you are using Cases in TM2 to track admission through to discharge of a patient and the appointment is for a new case or episode of treatment:

- **Ensure "This is the first appointment of a new case" is selected.**
- **In the Body Site field, select the body area the patient requires treatment for.**
  If you are not sure about this, select "Other" and the practitioner can change the Body Site when they see the patient.
- **Check the correct Consultancy is shown. Modify if required.**
- **If you are using authorisation code tracking, ensure the correct code is entered.** See the end of this chapter for details.
- **[Create]**

This process will create a new TM2 Case in the patient's record.

Note that if the patient has an existing case open this method can still be used to create a new case.

When Using TM2 Cases – Follow up Appointment

If you are using Cases in TM2 to track admission through to discharge of a patient and the appointment is for an existing case or episode of treatment:

- **Ensure "This appointment belongs to an existing case" is selected.**
- **In the Case field, the body site of the existing case should already be selected.**
  If the patient has more than one case you can choose a different case by selecting the appropriate body site from the drop-down menu.

  If the patient is being seen for more than one body site per appointment you can select any one of the body sites shown.
- **Check the correct Consultancy is shown. Modify if required.**
- **If you are using authorisation code tracking, ensure the correct code is entered.** See the end of this chapter for details.
- **[Create]**

Appointment Options – Without Case Tracking

If your clinic does not track admission and discharge using TM2 Cases, TM2 will not know if an appointment is the first of a new case or if it belongs to an existing case.

The Diary Event form will therefore always default to "This is the first appointment of a new case".

If you are working this way, (and you do not intend to use authorisation code tracking) then your Lead TM2 User should set the following option:

- **Tools -> TM2 Options -> Advanced Configuration Tab -> Diary section**
- **Set "Link appointments to cases on creation" to false**

If you are working this way, use the following method when creating appointments:

- **Set the new case/existing case option appropriately.**
- **Check the correct Consultancy is shown. Modify if required.**
- **[Create]**

Modifying Appointments

Moving an Appointment

If the move is to an area of the diary that is already visible:

- **Drag the appointment to a new time slot and drop it there**
  You are asked if that is what you want to do and the appointment is then moved.

If you are moving the appointment elsewhere:

- **Right click on {appointment] -> Move Appointment**
  The appointment details are now "under your cursor"
- **Move to the appropriate day of the diary**
- **Left click on the slot for the new start time**
  Remember to have the green part of the icon over the required slot.

Cancel an Appointment

- **Right click on {appointment] -> Cancel Appointment**

TM2 has the ability to decide whether you should be charging for a cancellation based on the number of days it is until the appointment. If you are within the number of days for charging to be required you will be taken through the billing process. See the Finances section of this guide for how to handle billing.

Mark an Appointment as DNA

- **Right click on {appointment] -> Update Status -> Did Not Attend**
  You will be taken through the billing process – see the Finances section of this guide for how to handle billing.

Delete an Appointment

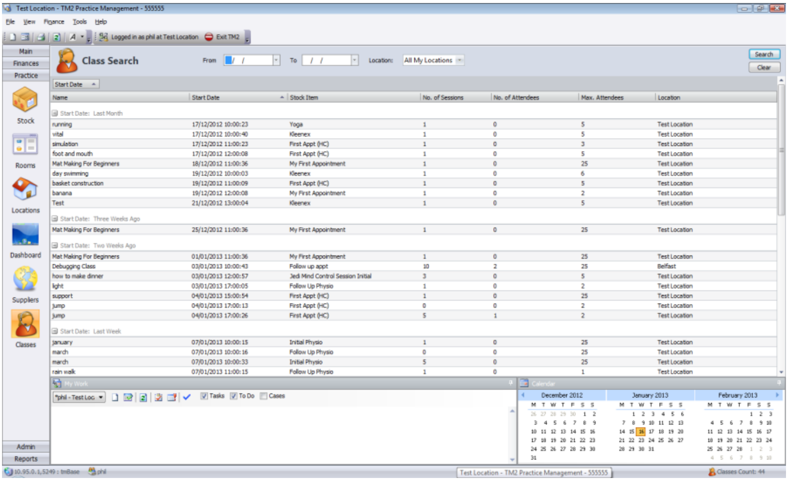
If you wish to delete an appointment completely (rather than mark it as Cancelled or DNA) then the appointment must have a status of Booked:

- **Right click on {appointment] -> Update Status -> Booked**
  If required.
- **Right click on {appointment] -> Delete Appointment**

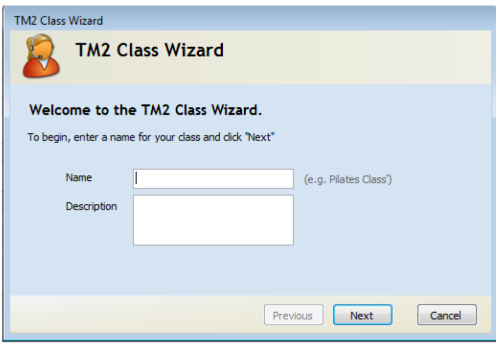
Creating a Class

Creating a Class

To create a class navigate to the class section from the menu bar **Practice >> Classes**. This will appear as the following:



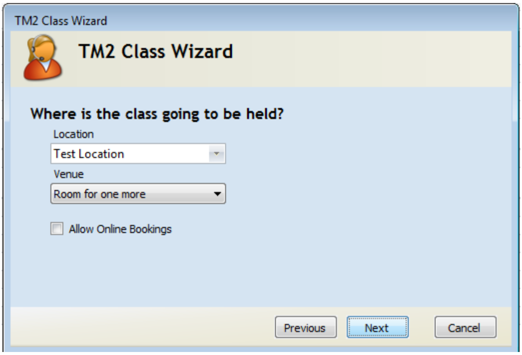
To create a new TM2 Class, click on the  icon to display the Online User Wizard. The Wizard can also be found via the main toolbar, under **File >> New >> Class**. Once selected the Class Wizard will start:



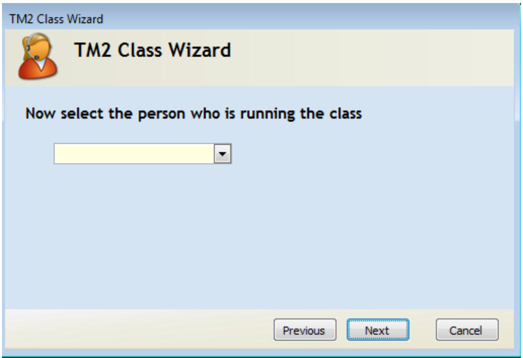
Enter in the name of the Class and a description.

Creating a Class Continued

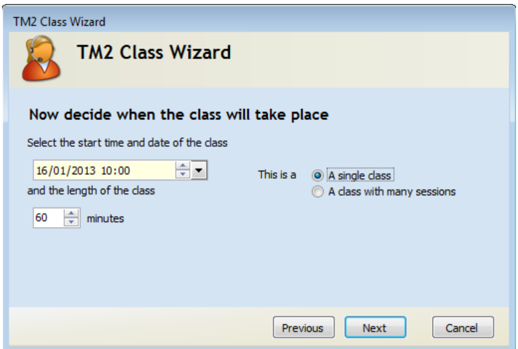
The next stage will be to select the location of the class and the room within that location. There is also an option to make that class available for online booking.



Now you can select the practitioner that will be holding the class.



The date, time and length of the class can now be set. Also the class can be set as a single class or reoccurring.

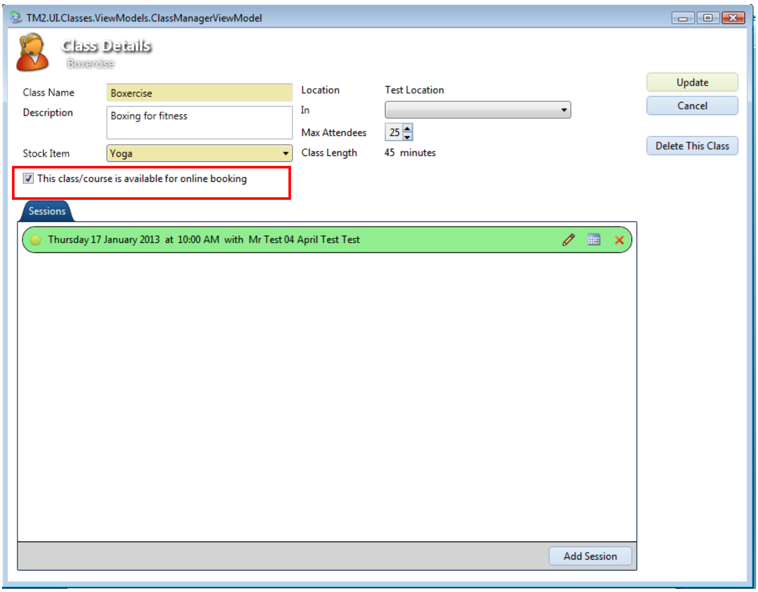


Creating a Class Continued

The charge for the class can now be set, either from your existing list of stock items or from creating a new stock item for the class. There is the option to create a new stock item from the tab listed.

The next stage is to set the max number of attendees and complete the class. Once completed the user will be taken to the class screen as can be seen below:

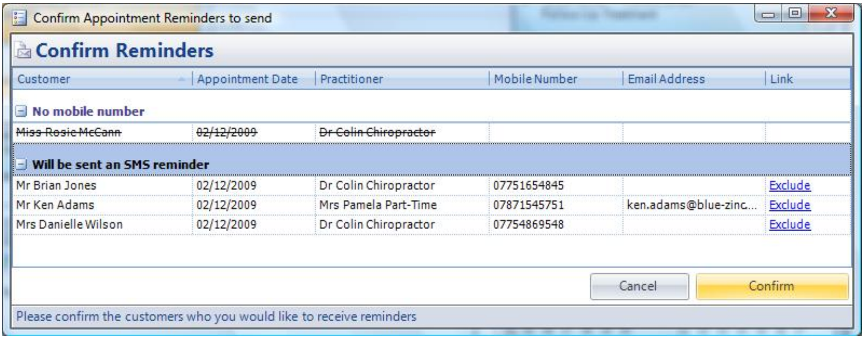
To enable classes to be available online the option to make classes available for online booking must be selected.



Text Message and Email Appointment Reminders

TM2 has some powerful capabilities to send appointment reminders via text message and email. Please note that this can only be done if the patient has a mobile number and/or email address in their record, your copy of TM2 has been enabled for text messaging and you have a live connection to the internet.

When you access this function you see a confirmation screen which allows you to see and modify who will receive the reminder:



Reminders for All Appointments on a Day

- **Right click on any appointment on that day**
- **Send Communication -> Reminder SMS/Email -> For this location's appointments today**

Reminders for One Practitioner's Appointments on a Day

- **Right click on any appointment for that practitioner on that day**
- **Send Communication -> Reminder SMS/Email -> For This Practitioner's Appointments Today**

Note that if you are using multiple TM2 locations and the practitioner has appointments at different locations you will need to do this for each location.

Reminders for a Specific Appointment

- **Right click on that appointment**
- **Send Communication -> Reminder SMS/Email -> For this appointment only**

Other Useful Diary Functions

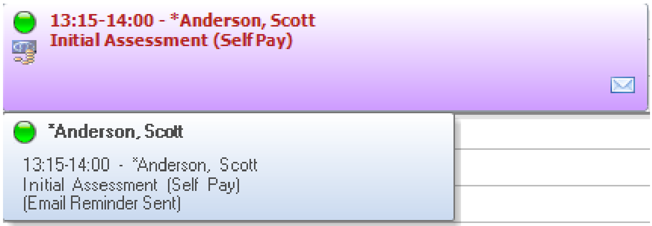
How to View if a SMS/ Email has been sent.

After sending a SMS/Email go the Diary and select the appointment in which you sent the SMS/Email.

Once the reminder is sent an image will appear on the bottom right of the appointment showing an Email or SMS symbol which indicates the message has been sent.

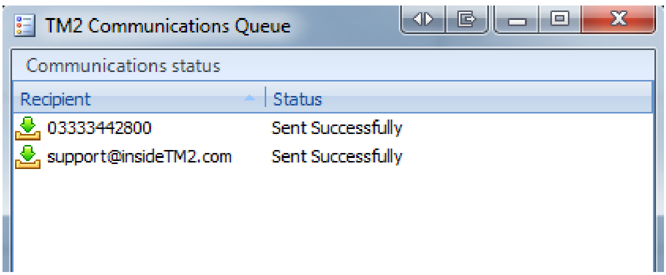
If you hover the mouse above the appointment it will say if the Reminder is sent.

Email Example:

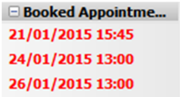


SMS Example:

*If you press **CTRL-F12** the **TM2 Communications Queue** will appear this will allow you to see the status of all communications sent from TM2.*



See a List of The Patient's Future Appointments



When you create or re-open an appointment in the diary all booked appointments are shown in the bottom right hand corner.

Find the Next Appointment

Right click on [appointment] -> Go to Next Appointment

Go Directly To Their Patient Record

Right click on [appointment] -> Go to Patient

Use Quick Keys in the Diary

To do this you need to first select the appointment and then press the appropriate key:

Left click on {appointment]
The appointment gets a black outline

Press the appropriate key on the keyboard
The keys available are shown on the right-click menu

Multi-Disciplinary Practices - Using Diary Colours

The TM2 Diary can be set up to show different colours for different disciplines:

→ **Different Kinds of Appointments** - Appointments of different disciplines could be different colours or first appointments could be a different colour to follow-up appointments

→ **The Working Hours of Different Practitioners** – so you can show the working hours of practitioners with different disciplines in different colours.

These colour schemes can be set up by your Lead TM2 Practitioner via the Practitioners and Stock views in TM2.

Capturing Authorisation Codes

This function allows you to record and monitor authorisation codes that have been supplied to patients by their insurance company. Note that the availability of the feature can be turned on and off in TM2 according to whether your practice management have decided it should be used.

Setting Up Group Authorisation Codes

In order to use Authorisation codes for particular group and patient, the group needs to be set up to use authorisation codes.

- ❑ Search For Desired Group and Select **[Group]**
- ❑ On the record Select **[Treatment Authorisations]** 

- ❑ Tick **[Use Treatment Authorisation]**

Field Name	Generally Used For	Use in Our Practice
Cancellations affect remaining authorisation total	If a cancellation has occurred the treatment total will be reduced by 1.	
DNAs affect remaining authorisation total	If a DNA has occurred the treatment total will be reduced by 1.	
Auto-generate sequential treatment authorisation	Allows for a naming convention e.g. “AUTH” will appear before the code is inputted	
Default Number of treatments on treatment authorisation creation	Allows the user to define how many treatments are defaulted with each authorisation.	

Creating an Authorisation Code Record

This can either be done from the Diary Event form:

Diary Event Form

Click on Add in the third box down

Or it can be done from the Patient Form:

Patient Form, Authorisation Codes tab

[Add], fill out the form as below, [OK]

Field Name	**Generally Used For**	**Use in Our Practice**
Treatment Auth:	The code you have been given	
Start Date	Date code starts. It won't be selectable in the diary before this date. Defaults to (today). Set to be earlier if required.	
Expiry	Date code expires. Defaults to 1 month from start date. If no date is available and expiry is more by usage then set to a long time in the future, say 1 year.	
Used for	Which insurance company the code relates to. Leave to default value.	
Max Treatments / Value	Max number of treatments or value of treatments allowed by this code.	

Managing Authorisation Codes

Applying a Code to an Appointment

If you are using authorisation code tracking, you will be required to assign an authorisation code to an appointment at the time the booking is made.

Diary Event Form, Authorisation Details field

If the auth-code is already stored in TM2 and is a valid code, it will automatically be assigned to an appointment as the appointment is made.

The appropriate reduction in the remaining number or value of treatments is made when appointments are booked.

When A Valid Code Is Not Available

If a valid code is not available at the time of booking the appointment, TM2 can be set up so that the patient will pay for this specific appointment themselves:

Diary Event form

In the first box, <u>Change Group</u>

Change the group listed below the patient name to be "Private Patient"
This will bill just this specific appointment to the patient.

If the patient then brings a valid authorisation code it can be entered into TM2 and the group changed back to the insurance company on the diary event form.

If the Authorisation Details Field is Not Visible

If the Authorisation Details Field is Not Visible it is because you need to set some configuration option:

Tools -> TM2 Options -> Advanced Configuration Tab -> Diary section

Set "Link appointments to cases on creation" to True

Set "Use Authorisation Codes for Appointments" to True

[Save]

Managing Documents and Communication

Managing Documents – The Letters Section

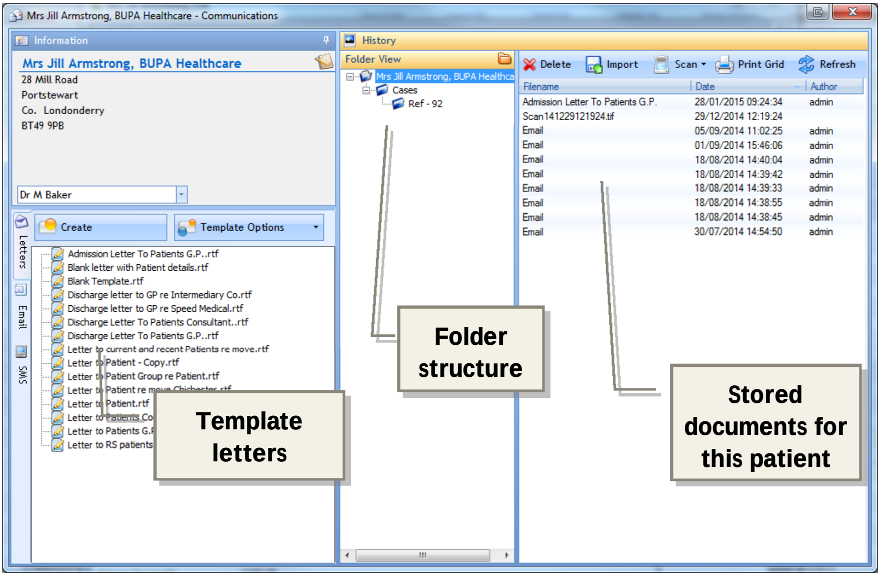
All the information we have discussed so far is managed via fields in the TM2 database. However TM2 can also manage documents such as letters or scans. This is done in the Letters section of TM2.

Accessing the Letters Section

The Letters section has different areas depending on what kind of communication you are dealing with. The most common place you will access letters is through the Patient Form.

Open Patient Form, [Letters]

This brings you into a new window:



Creating Letters From The Templates

Select the appropriate medical contact

Double click on the template

Edit the document in Word

Print, Save and Close in Word

The document is with the patient record and shown on the right side

Other Functions in Letters

Creating Folders and Templates

Use the [New Folder] and [Delete Folder] options to create a folder structure for a particular patient.

New templates can be created by your Lead TM2 User.

Importing Other Documents

Other kinds of documents such as scans can be imported into the Letters area of TM2 using the [Import] function.

Exiting the Letters Section

Press the  **button in the top right hand corner.**

Sending Emails and Text Messages

Emails and text messages can be sent from the Letters Section:

Click on the Email or SMS tab

Compose the message

[Send]

Note that emails are sent as coming from the details set up for the practice (in the “Location” definition) rather than the individual user.

Also note that your practice needs to be enabled for the “TM2 Text” function to be able to send emails and text messages from within TM2. See your Lead TM2 User or call TM2 support if this facility is not working correctly.

Scanning Documents

Click on [Scan]

Follow the instructions. Individual pages are scanned and saved one page at a time.

Managing Finances: Reception Desk Tasks

Finances in TM2 – An Overview

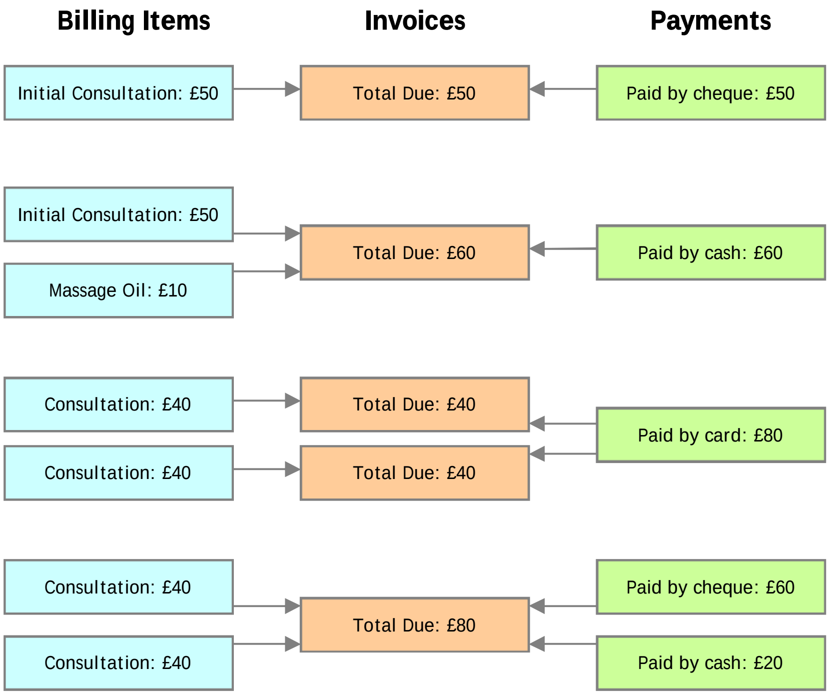
TM2 uses the following terminology with regard to managing finances:

→ **Billing Item** – a line item an invoice, for example an appointment or a physical item sold such as massage oil. Billing Items can either be directly placed on an invoice or stored in a patient or insurance companies' account to be placed on an invoice at a later date. Billing Items are most commonly created when you "complete" an appointment in the diary.

→ **Invoice** – a document requesting payment for one or more Billing Items.

→ **Payment** – a record of money received which is reconciled against one or more invoices.

If you consider these relationships graphically you can see the following possible combinations of these items:



The following sections cover how to handle each of these situations and other real-life scenarios that arise.

Billing For An Appointment

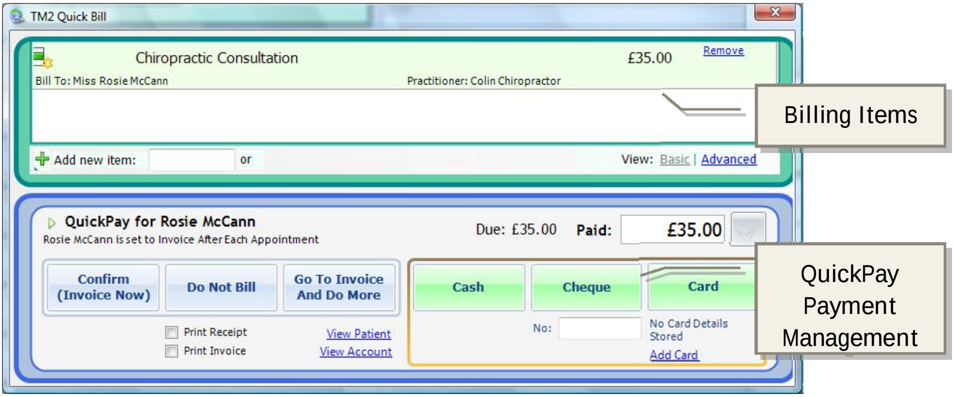
Billing for each appointment is done via the diary:

Diary view

Right click on {Appointment}, select Update Status -> Completed (C)
This brings you to the TM2 Quick Bill form.

Using TM2 Quick Bill

When you complete an appointment you come to the Quick Bill screen which is divided into two parts:



The form allows you to add further billing items and manage the payment.

Managing Payment with Quick Bill

In most cases you will just record payment using one of the six buttons in the lower QuickPay section:

Verify that:

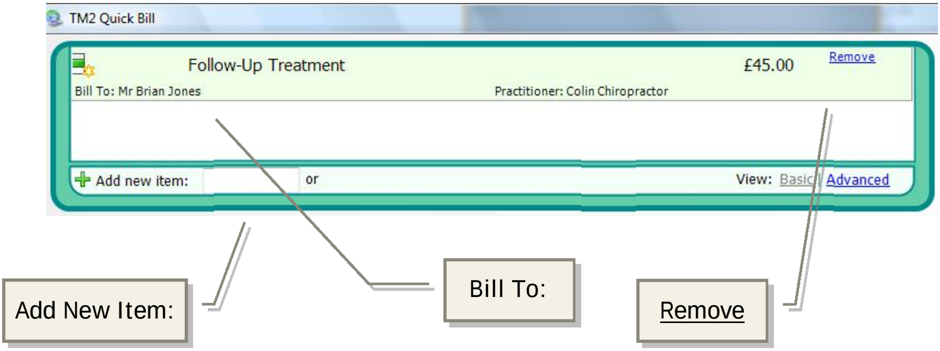
The appointment being billed is correct
The "Due" and "Paid" amounts are correct

Select the Print Receipt and/or Print Invoice options as required

Click on the appropriate payment method button:

QuickPay Button	Records	Creates	Notes
Cash	Paid immediately by cash	Billing Item Invoice Payment	Not available for insurance company patients.
Cheque	Paid now by cheque (cheque number can be recorded in the box below)	Billing Item Invoice Payment	Not available for insurance company patients.
Card	Paid now by credit card	Billing Item Invoice Payment	Not available for insurance company patients. Card details do not need to be stored in TM2.
Confirm (Ad-Hoc) Confirm (Invoice Now)	Invoice later (Ad-Hoc, Monthly) or Invoice immediately	Billing Item Or Billing Item Invoice	Pulls through the invoice period from the patient record. Immediately/Ad-Hoc/Monthly.
Do Not Bill	This appointment will not be billed	Nothing	
Go To Invoice And Do More	Creates an invoice with the Billing Items on it.	Billing Item Invoice	You are taken to the invoice to do more things (such as edit the Billing Item or add a discount)

Managing Billing Items With Quick Bill



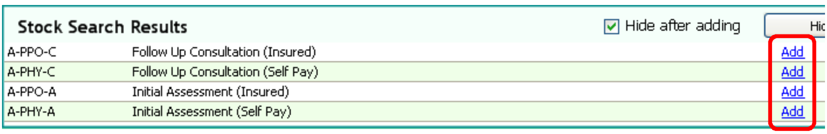
The Billing Items area of the Quick Bill screen allows you to manage the Billing Items that are to be invoiced. The following functions are available:

Add More Billing Items

Click in the "Add new item:" box

Start typing the beginning of an appointment or stock item Reference or Description.

The items fitting this description are listed.



Click on <u>Add</u> next to the item to be added

Remove Billing Items

Click on Remove next to that item

Change Who Pays – Patient or Insurance Company

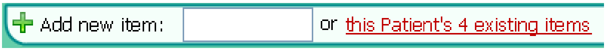
Click in the "Bill To:" area, change who is to be billed

From the (very small) drop down menu option that appears:

Adding Outstanding Amounts Using QuickBill

Adding Un-Invoiced Billing Items

If the patient has outstanding Billing Items which have not been invoiced, you are given the option to add these when in QuickBill:



Click on <u>this Patient’s X existing items</u>

Adding Un-Paid Invoices

If the patient has outstanding amounts on one or more invoices, these will be shown below the Billing Items area:

Outstanding Patient Invoices for Mr Peter Part-Payment

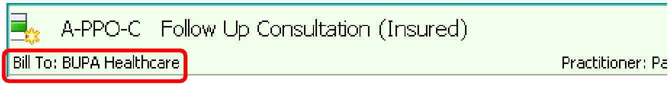
Date	Ref	Status	Total	Amount Paid	Location	
20/12/2007	170	Part-Paid	£30.00	£25.00	Belfast Clinic	Add
24/12/2007	216	Part-Paid	£30.00	£25.00	Belfast Clinic	Add
31/12/2007	246	Part-Paid	£30.00	£25.00	Belfast Clinic	Add

To add the outstanding amount from one of these invoices to the amount to be paid:

Click on <u>add</u> next to each invoice listed

QuickBill and Insurance Company Patients

When a treatment is to be invoiced to an insurance company, the “Bill To:” field will default to being that insurance company:



The Billing Item can be re-directed to the patient by changing this field as previously described.

Managing Insurance Company Payment

The insurance company will pay for this treatment at a later date when they are invoiced. Hence you:

Click on [Confirm (Monthly)]

This will create a Billing Item in the Insurance Company’s account which will be invoiced at a later date.

If you wish to create the invoice to the insurance company:

Click on [Go to Invoice and Do More]

This places the Billing Item on the invoice straight away

From the invoice you can print and save as required.

Adding Physical Stock Items

If the patient purchases a physical stock item such as some massage oil they are usually required to pay for this item themselves.

The stock item can still be added to the list of Billing Items:

Click in “Add new item:”, find and add the new stock item

In most cases the new item should have its “Bill To:” already set to the patient. If this needs to be changed:

Click in the “Bill to:” area of the new Billing Item and change to patient.

If you have Billing Items for both the patient and the insurance company then QuickPay will have separate areas for each which you can manage appropriately.

Billing Using The Invoice Screen

As well as using the QuickBill screen, it is possible to move to the invoice screen to perform billing. This is necessary if you wish to:

→ Add a discount

→ Create an invoice immediately which will be paid at a later date

→ Add a Billing Item that is associated with a different practitioner

Going to the Invoice Screen

Diary view, Right click on {Appointment}, select Update Status -> Completed (C)

[Go To Invoice and Do More]

This creates the Billing Item, places it on an invoice and opens the Invoice form.

Taking Payment

Invoice form, [Accept Payment]

Takes you to the Payment form

Select Payment Method, modify Amount if required

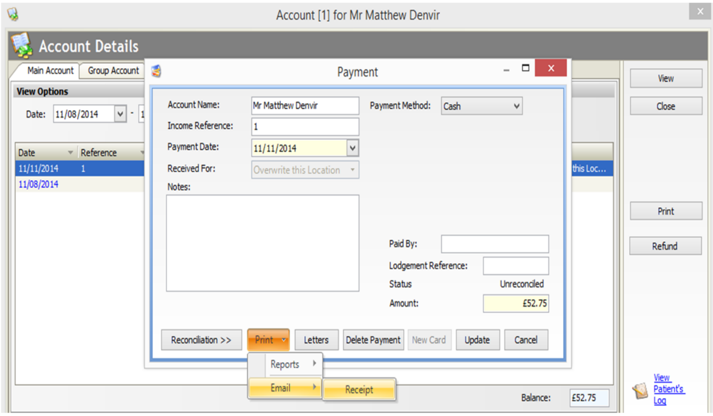
[Create]

Select whether to print receipt

Takes you back to Invoice form, payment is listed, and outstanding reduced

Select whether to email receipt

Takes you to Send Email Screen, receipt is attached, send, returns to payment screen, update and close



Adding Extra Billing Items On Invoice, Changing Practitioner

Invoice form, [Add New Item]

If required, you can change the practitioner on this form. Once the Billing Item has been added to the invoice then the practitioner can no longer be changed: you will need to delete the Billing Item and add a new one with the correct practitioner.

Removing Billing Items From An Invoice

Invoice form, select Billing Item, [Remove]

Removes Billing Item, leaves it in customer's account for later payment.

Invoice form, select Billing Item, [Delete]

Remove Billing Item and deletes it from customer's account.

Giving Discounts

There are two methods of applying a discount:

Discounted Appointment Type

If the discount is regularly given to this patient then the discounted price can be set up as an appropriately named appointment type (e.g. "Student Appointment") by your Lead TM2 User. This is best selected when an appointment is booked:

Diary Event Form -> Consultancy field
Select the discounted appointment type

In many cases it is possible for your Lead TM2 User to set up TM2 to make the discounted appointment type always appear by default for a specific patient.

If not correctly set when the appointment is booked, the discounted appointment type must be changed in the Diary before the appointment is completed:

Double Click on {Appointment}

Change the Consultancy field as required. [Update]

Note that using this method will credit the discounted price to the practitioner's reported income.

Applying A Discount To The Invoice

A discount can be applied directly to an invoice. If you are doing this when completing an appointment:

Right click on {Appointment}, select Update Status -> Completed (C)

[Go To Invoice and Do More]

Invoice form, [Add Discount]
You can enter either a percentage or a fixed amount.

[Apply Discount]

You must now use the features on the Invoice form to record the payment:

[Accept Payment]. Fill in Payment Method. [Create]

(on the invoice form) [Close]

Note that this method will credit the non-discounted amount to the practitioner's income.

Other Day To Day Financial Operations

Free Appointments

Free appointments are a specific case of discounted appointments, where the discount is 100%. They should be handled by one of the two methods described above.

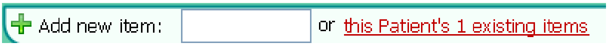
If The Patient Cannot Pay At That Moment

Right click on {Appointment}, select Update Status -> Completed (C)

Select [Confirm – Ad Hoc]

This creates the Billing Item for their appointment and places it in their account.

The next time they come for an appointment, you will have the option to add this existing billing item:



Clicking on "this Patient's 1 existing item" will add it to their invoice at this time.

Printing A Receipt for Multiple Appointments

This is most easily done from the patient's account:

Patient Form, View Account

Billing Items tab

Tick [Show Invoiced Billing Items], un-tick [Show Un-invoiced Billing Items]

Click on the Date column to sort by date

Left-click on the first Billing Item

Hold down [ctrl] and click on the other Billing Items

[Print]

Sale of Physical Items – Additional Issues

Sale of Physical Items Only

If this is an existing patient who will pay immediately:

Patient (or Customer Group) Form, [Create Billing Item]

An empty QuickBill window appears.

Click in "Add New Item".

Find and add the item purchased.

Click appropriate payment button
(as previously described on page 47)

When Invoices Come From the Practitioner

If invoices for treatments come directly from the practitioner, the Employment Status field of their practitioner record will be set to "Self Employed". Patients who have an appointment for such a practitioner and then buy a physical stock item usually make two separate payments: one directly to the practitioner for the appointment and one to the practice for the stock item.

If an appointment is for such a practitioner you will not be able to add the physical stock items on the QuickBill form. You should:

→ Complete the Quickbill process for the appointment only.

→ Follow the process defined above for the physical stock item.

Customers Who Come In "Off The Street"

If the customer comes in "off the street", you are best to set up a dummy patient called "Off the street" and create the invoice/payment details against this patient.

Cashing Up at the End of the Day

TM2 allows you to view all of the payments you have received over a period of time for cashing up purposes. You can optionally add lodgement references to record how the money was paid into your bank and allow easy reconciliation with your bank statements.

Tools -> End of Day Reconciliation

Set the date range (and location if required)

[Find]

This brings up a list of payments, grouped by payment type.

Payments

Cash — Enter Reference: [Set] [Reset]

Include	Ref	Date	Method	From	Amount	Lodgement Ref
☑	424	18/08/2014	Cash	Mr Gary PPP	£280.00	
☑	426	18/08/2014	Cash	Mrs Jill Armstrong	£100.00	
☑	427	27/08/2014	Cash	Mr Scott Anderson	£35.00	
☑	428	01/09/2014	Cash	Mr Pat Philips	£45.00	
☑	429	01/09/2014	Cash	Mr Tim McKay	£45.00	

Setting Lodgement References

You can now use the interface to set Lodgement References for groups of items being paid into the bank.

You can either set Lodgement References for individual items:

Enter the reference in the Lodgement Ref column

Or you can set Lodgement References for a set of items:

Ensure the Include column has a tick ☑ for each item to be included

Set the reference in the "Enter Reference:" field

[Set]

When they are correctly set you need to save them:

[Save]

You can optionally print the details before closing out of the window:

[Print]

[Close]

Monitoring and Reporting Financial Details

Viewing Patient or Group's Account

Patient (or Customer Group) Form, [View Account]

Printing a Statement of Account

Patient (or Customer Group) Form, [View Account]

Set the Date Range for the dates you want included in the Statement.

[Print]

Managing Payments

Deleting Payments

Payment Form, [Delete Payment]

Note that payments may only be deleted by users of level System User. If your login is not that of a System User you will have to request that a System User deletes payments on your behalf.

Modifying Payment Amounts

If a payment amount has been entered incorrectly it is possible to change the amount. Before this can happen the payment needs to be un-reconciled from any invoice.

Payment form, [Reconciliation <<]

The payment reconciles with all invoices shown that have a value in the “Reconcile” field.

Double click on each invoice listed

In the Payments section of the invoice, [Remove], Close out of invoice.

On the Payment Form, [Update], [No] to receipt, [No] to continue

Re-open the payment.

Change the amount. [Update]

Reconcile as required.

Issuing Refunds for Overpayment

Patient or Customer Group Form -> View Account

[Refund]

Edit the amount

[Create]

Advanced Refund Options

You can configure your TM2 to require a reason for issuing a refund. This will add a required field for Refunds called "Refund Reason" which you will have to complete when adding a refund. To activate this feature:

- ❑ **Tools -> TM2 Options -> Advanced Settings.**
- ❑ **Billing – "Require Refund Reason" set to "True" to activate.**

You will be able to either key in a refund reason or select one from the pre-populated "Refund Reason" lookup.

Refunds can be issued to any unreconciled payments on the system, even if the account is in debit.

Accepting a Single Payment for Multiple Invoices

You may find yourself in this situation if you receive a large payment from an insurance company, for example. You will first need to create a record of the payment, and then reconcile it against the multiple invoices. Note that new payments are created from the Patient Group or Patient Form rather than from the Payments View.

Creating The Payment

Open the Patient Group or Patient Form for the person or organisation that has made the payment.

[Accept Payment]

Enter the Amount and Payment Method, [Create], [No], [Yes]

Performing The Reconciliation

[<< Reconciliation]

This will list all the outstanding invoices from the patient or patient group.

Click (once only!) on the first relevant invoice listed, and press the (INS) key on your keyboard

This reconciles the full outstanding amount on the invoice against the payment. Change the amount in the “Reconcile” column to reduce the amount reconciled.

Follow the same process for all other relevant invoices

Note that you can click in a column heading to sort the list of invoices as required.

[Update]

Making Notes About Amounts Paid

Open the invoice you are reconciling against by double clicking on that entry.

From the invoice form, click on one of the two icons at the bottom left hand corner of the Billing Items area to go to the Patient Form or the Patient Log from where you can record the relevant details.

Issuing Credit Notes

An invoice is a request for payment of a specific amount. If it is later found that the payment amount requested was wrong, a Credit Note is issued.

Creating A Credit Against An Invoice

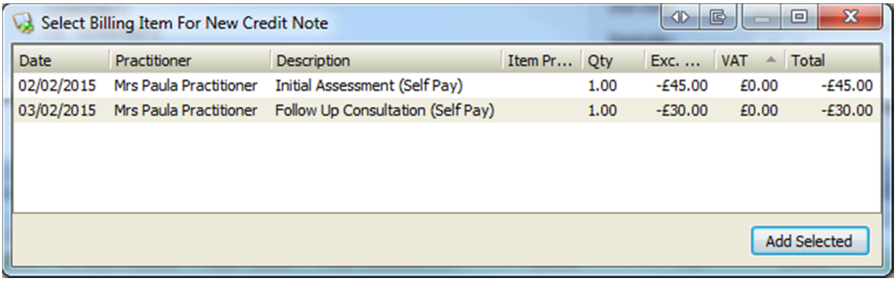
Open the invoice which the credit note is to be issued against

[Add Credit]

If you are issuing a credit note for less than the invoice amount:

Select "Credit part of the amount of this invoice", [OK]

This brings you to a window where you can select which of the Billing Items on the invoice you wish to issue to credit against. This window lists all of the Billing Items from the invoice. The final column, "Total", represents the Credit to be applied. Credits are shown as negative numbers:



This window is displayed showing all Billing Items on the invoice. You need to enter the amount of credit to be applied against specific Billing Items.

For the Billing Item to be credited, edit the amount of the credit in the Total column (e.g. to give £20 of credit type "-20.00").

Ensure this Billing Item is selected, [Add Selected]

If there is more than one Billing Item hold down the [ctrl] key to select multiple lines.

The credit is now shown on the invoice as a negatively valued Billing Item.

To print a Credit Note:

[Print/Email] -> Print Credit Note

Note that a credit is applied to the list of Billing Items reported for each practitioner.

Sending Invoices Electronically

There are two methods by which invoice details can be sent electronically:

→ **Email a PDF Copy of the Invoice** – see below.

→ **Electronic Link to Healthcode** - Healthcode are an organisation set up by the insurance industry to provide an electronic interface for managing invoice and payment details to the major insurance companies (See separate Healthcode guide for more detail).

Emailing a PDF of an Invoice

Note that this capability requires (1) that your TM2 installation is enabled for the “TM2 Text” option and (2) you have a live connection to the internet.

Open the invoice

[Print / Email] -> Email Invoice -> Blank Body

This brings you to a “Send Email” window which is:

→ Automatically addressed to the Patient or Patient Group

→ Has a “From Address” taken from the email specified in the record of the user’s login.

→ Already has a PDF copy of the invoice attached to the email.

→ Contains a blank message area.

Type a suitable message in the email.

It is possible to add one more attachment to the email:

Click on [Add Attachment], select file, [Open]

To send the email:

Click on [Send]

The email interface only allows one address in the “To:” and “CC” fields. The email is sent electronically to the TM2 email server from where it is sent.

Emailing a PDF of a Receipt

This new feature will allow users to email a payment receipt directly to the client as a PDF attachment. This is accessible under the ‘Print’ option while viewing a payment.

Practice Expenses in TM2

TM2 can be used to track the expenditure of your practice. Expenses can be recorded via the **Finances -> Expenses** section.

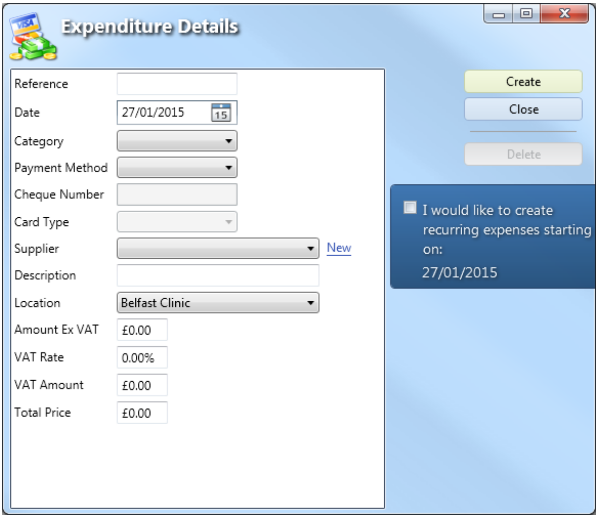
Adding an Expense Record

In order to record your practice expenses in TM2:

Finances -> Expenses

Right click in the Expense area -> "New Expense"

Complete fields in "Expenditure Details" as required.

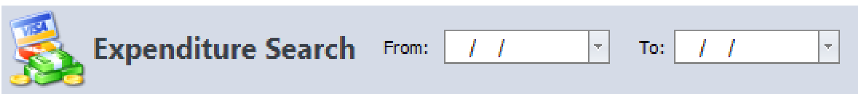


If you wish to have a reoccurring expense – Add tick box and select reoccurrence options.

[Create]

Searching for Expenses

When expense records have been added to the system, these can be retrieved from TM2 via the **Expenditure Search**.



To view all Expenses leave the "From" & "To" date ranges blank and click [Search]

For expenses in a specific date range, add the details to the "From" & "To" date ranges and click [Search].

Running Reports

Running Reports

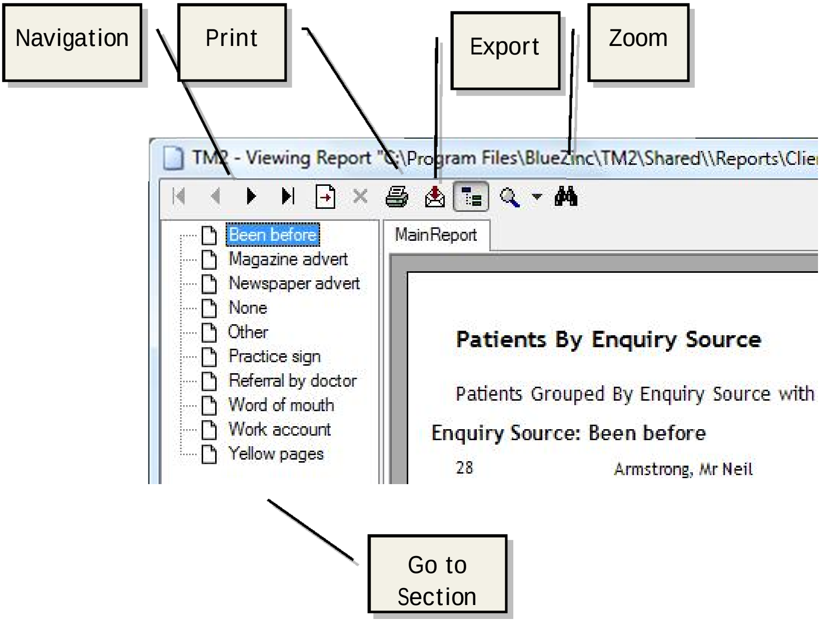
TM2 reports can be run as follows:

Report View, click on {Report Section, e.g. Diary, Finance}

Double Click on report name

Answer questions/options on report

The report viewer allows you to move through the report, zoom, search for a specific word, print and export to Excel or Word. The viewer controls are:



The viewer appears in a separate windows to TM2. If it disappears you can bring it back to the front by clicking on its icon at the bottom of your screen:

To close out of the report viewer

Press the button in the top right hand corner.

My Reports

List specific reports you use in your day to day work:

Report Section	Report Name	Used For:
e.g. Finance	*e.g. Income Summary By Practitioner*	

Capture Clinical Notes With TM2 Touch

Introduction to TM2 Touch

Terminology Used

TM2 uses the following terminology:

- → **Case** – a collection of appointments relating to the same problem (sometimes known as an "Episode" in different practices).
- → **Consultation** – the interaction between practitioner and patient in a single appointment
- → **Body Site** – the main area of the body affected by the patient's condition
- → **Assessment** – documentation relating to a particular way a part of the patient's body was assessed.
- → **Modality** – a treatment given for the patient's condition.
- → **Lead TM2 User** – the person at your practice who manages the TM2 Touch environment.

Entering TM2 Touch

When using TM2 Touch to create notes relating to a specific appointment, it is important you enter the TM2 Case from the diary:

Right click on {Diary Event} -> Go to Case

This will create a link between the appointment and the notes for the specific Consultation created in TM2 Touch.

It is also possible to enter a case via the Patient Record and Cases view. These methods should only be used if there is no need to create a new set of Consultation notes relating to a specific appointment.

To open a TM2 case from the Patient Record form:

Open Cases tab, double click on appropriate case listing

To open a TM2 case from Cases view:

Search for the case, double click on appropriate case listing

Look at a Complete Case

You may want to look through a complete example case in order to get a quick feel for how TM2 Touch works.

Log into TM2 in the Training database

If you are the lead TM2 user, log in as user “admin”

Otherwise check what user name to use with your Lead TM2 User

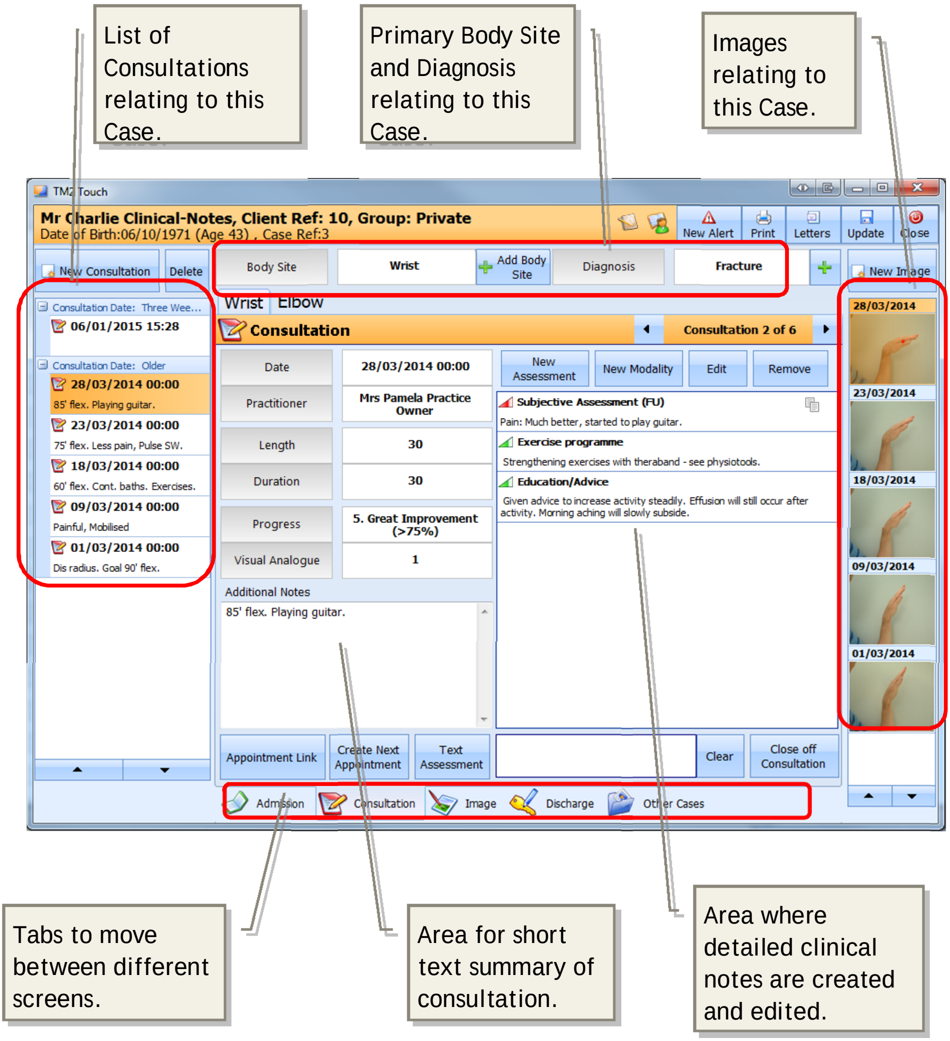
Find the Case for patient “Charlie Clinical-Notes”, body site Wrist.

Take a look around using the details on the following pages to guide you.

The TM2 Touch Interface

When you enter the TM2 Touch interface you are seeing the details relating to a single Case.

The interface has the following main areas:



The Admission Screen Fields

Use the fields on the Admission screen as indicated below. The BUPA icon indicates fields that are required by the BUPA report.

Field	Use	How value is set and modified	Use in our clinic
Practitioner	Usual practitioner for this patient.	Is automatically set to be the practitioner who first sees the patient for this case. Can be overridden.	
Admission Date	Date of admission.	Is automatically set to the date of the first appointment if the Case was created from the appointment. Otherwise set to date case is first created. Can be overridden.	
Admission Code	Coding to categorise the kind of admission or referral.	Set by user from a list modifiable by practice.	
Referrer	Contact who referred this patient.	Set by user. List of possible contacts is taken from Medical Contacts area of TM2. Use first letter of surname to move through list.	
Referral Date	Date referral was made.	Set by user.	
Letter Date	Date a specific letter relating to the admission was received or generated.	Set by user.	
Admission Pain Scale	Pain upon admission	Set by user in range 0-10.	
Injury Cause	Cause of injury	Set by user from a list modifiable by practice.	

The Admission Screen Fields (2)

Field	**Use**	**How value is set and modified**	**Use in our clinic**
Time Present	The length of time the condition has been present.	Set by user – both number and units (days, weeks, etc.).	
Case of Interest	Customisable field.	Yes/No answer set by user.	
Patient Type	Customisable field.	Set by user from a list modifiable by practice.	

Admission Screen Free Text Fields

There are also four free text fields on the Admission screen.

In using these fields:

Click once in the field to have the on-screen keyboard available.

Click twice (slowly!) in the field to remove the on-screen keyboard.

To cut and paste text using these fields:

Paste text using [ctrl]-v or right click -> Paste

Copy text by selecting it and using [ctrl]-c or right click -> Copy

Note here the use of these fields within your clinic:

Field	**Use in our clinic**
Diagnosis Notes	
Reason for Referral	
Pre-Existing Conditions	
Agreed Functional Outcome	

It is possible to cut and paste text into these fields from the notes created from an Assessment. See later for details.

You are recommended not to use the Patient Entitlements function.

The Consultation Screen Fields

The consultation screen contains information relating to a specific consultation.

The fields are used as follows:

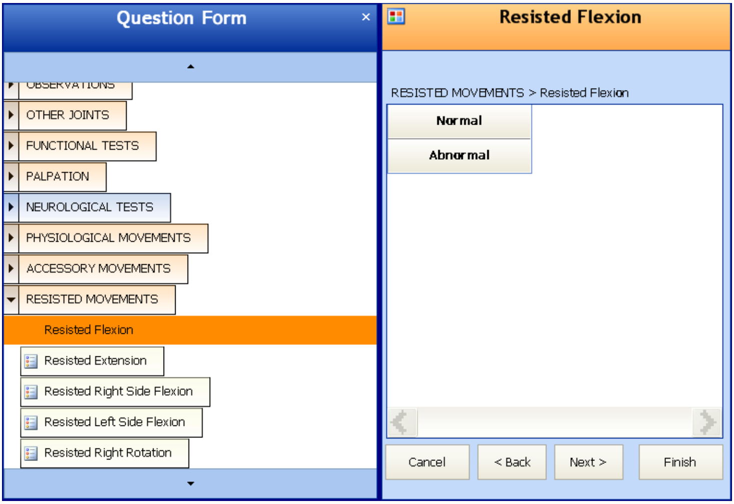
Field	Use	How value is set and modified.	Use in our clinic
Date	Date and time of the appointment the consultation is linked to.	Is automatically set when consultation is linked to an appointment. See later for details of appointment linking.	
Practitioner	Practitioner who consultation was with.	Is automatically set when consultation is linked to an appointment.	
Length	Length of appointment in minutes.	Is automatically set when consultation is linked to an appointment.	
Duration	Actual length the appointment lasted in minutes.	By user.	
Measure (Progress)	Customisable field.	Set by user from a list modifiable by practice.	
Scale (Visual Analog)	Customisable field.	Numeric answer set by user.	
Additional Notes	Free text notes summarising the consultation. First half line appears beneath consultation entry on left of screen. Full text appears in Case Summary report.	Free text entered by user. Maitland and Quick Picks can be used.	

Assessments and Modalities

Assessments and Modalities allow you to rapidly create your clinical notes with the minimum of typing. They are organised as groups of questions and answers, which are collectively known as Assessment Templates.

A set of Assessment Templates are provided with TM2 for different disciplines. These are then modified by a lead practitioner within a practice to suit the way in which you work and the terminology you most commonly use.

When using an Assessment or Modality, you work with a display as shown below:



The different questions may be grouped together into Sections: in this example you can see Sections for Physiological Movements, Accessory Movements, Resisted Movements, etc. Within each Section there are individual Questions: here we see Resisted Movements questions such as Resisted Flexion, Resisted Extension. As you touch on a Question the Answer is given on the right hand side.

Body Site Specific and General Assessments

Some Assessments are specific to a body site, e.g. Knee Assessment or Wrist Assessment. Some are more generic such as a Pain assessment or Special Questions.

You are best to set the Body Site field before using Assessments so the most appropriate list of Assessments are displayed.

Using Assessments and Modalities (1)

To Commence an Assessment

Consultation tab -> [New Assessment]

Touch on the required assessment

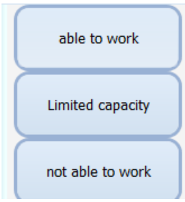
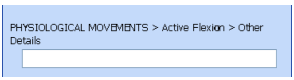
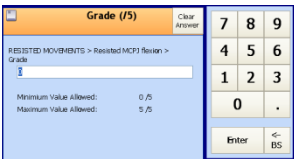
To Commence a Modality

Consultation tab -> [New Modality]

Touch on the required modality

Responding to Questions

The possible kinds of answers fall into three categories. The following table shows how to enter the appropriate answer and move on to the next question.

Kind of answer	How to respond and move to next question
Multiple Choice Answers 	**Touch on the appropriate answer.**
Free Text Answers 	**Type your text at the computer keyboard or on-screen keyboard** **Touch [Next]**
Numeric Answers 	**Touch on the number using on-screen keypad.** Within shown range **Touch [Enter] using on-screen keypad or your computer keyboard** **(use [<-BS] to delete a number)**

Using Assessments and Modalities (2)

Moving Around Questions

To move to a different section or question:

Touch on the new section or question listing.

To move back to the previous question:

Touch on [< Back]

To skip this question and move to the next one:

Touch on [Next >]

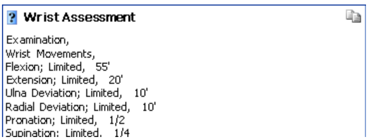
To cancel this whole set of questions (and lose all the answers you have given):

Touch on [Cancel]

To finish answering the questions and have TM2 create your clinical notes for you:

Touch on [Finish]

Editing and Copying Clinical Notes



The formatting of the clinical notes TM2 creates is determined by the way the different assessment templates are set up. This can be modified by the lead practitioner at your practice.

It is possible to edit the text of the notes that are created:

Double click within set of notes you wish to edit

This brings you into the notes editor where you can use the on-screen keypad or the keyboard.

Touch [Enter] on the on-screen keypad to end the editing session

If you wish to cut, copy or paste text within the notes editor:

Select text, then right-click -> Cut, Copy or Paste

To copy all of the notes created for this consultation:

Click on the  icon in the top right hand side of the clinical notes area.

Further Consultation Functions

Appointment Link

Consultations in TM2 Touch should normally be linked to an appointment. This ensures the Date, Practitioner and Length fields are filled out appropriately. Generally this happens automatically if you enter TM2 Touch from the diary. If a new consultation is created after entering TM2 Touch by another route it is possible this link will not be in place.

To create or update an appointment link:

Consultation tab, [Appointment Link]

This opens the Appointment List window.
If the appointment is already linked, a ✓ is shown next to it.
Un-linked appointments are marked with a *.

Select an un-linked appointment

Click on [Select Appointment]

Create Next Appointment

You can save and close a case and then move to the diary to create a new appointment for the patient all in one step:

Click on [Create Next Appointment]

Close Off Consultation

You can close off a consultation to prevent any further modifications to the notes you have captured. This allows you to prove that clinical notes were taken at the time of the consultation should you face litigation.

Touch [Close off Consultation]

When a consultation is closed you can add additional notes which are annotated with the date they were made and who they were made by:

Touch [Add Post-Close Notes]

These notes are added to the Additional Notes area.

Imaging in TM2 Touch

TM2 Touch has some excellent imaging functions, allowing you to annotate any body charts you choose and to store and annotate live images of your patient.

The body charts available are controlled by the Body Site you have set for the Case. Any body chart can be scanned into your computer system and made available by your Lead TM2 User.

The live image capability requires a web cam to be installed within Windows on your local computer.

Creating Images

Touch [New Image] in the top right hand side of the TM2 Touch window.

To create and annotate a body chart:

Touch on the appropriate Body Chart

To prepare for the capture of a live image (requires web cam installed on your PC):

Touch on [Photo]

Adding Symbols To Images

There are four symbols which can be added to a body chart or photo image. Symbols can either be applied:

→ **With Annotations** – you apply the symbol and then have a touch-screen option to create a textual annotation associated with the symbol

→ **Without Annotations** – you just apply the symbol

Symbols are more accurately placed with the mouse:

Click on appropriate symbol

The symbol is now “under your cursor”.

Click where you want to place the symbol

The symbol is placed there.

If you choose a “With Annotations” symbol you are then taken to a window where you can choose one of the General Assessments to create the annotation text. There is also an option to directly place an existing assessment on the image.

Managing Images and Image Symbols

To Add Multiple Symbols

Double click on the No Annotation symbol

Each time you click a new symbol is added. Press [Esc] to end

Managing Image Symbols and Annotations

Before a symbol or annotation can be modified, it must be selected.

To select a symbol with no annotation

Touch or click on the symbol.
If it has been selected it will move slightly as you click or touch on it.

To select a symbol with an annotation

Touch or click in the annotation text
The text will be highlighted.

To remove a symbol (and it's annotation if it has one):

Select the symbol, Touch on [Remove]

To edit annotation text:

Select the annotation, touch [Edit]

Change the text as required. Touch [Enter] to end the editing session

Managing Images

Images are listed in the area to the right hand side of the TM2 Touch window. To move through a long list of images:

Touch on the  **buttons**

To open an image from the image list:

Touch on the image in the list
The image now appears in the main window.

To remove an image:

Open the image and touch [Delete Image]

Patient Discharge

When a case is complete you can document the discharge process:

Discharge tab, touch on [Discharge]

Enter the date of discharge (defaults to the current day)

The rest of the options on the discharge screen now become available:

Field	Use	How value is set and modified	Use in our clinic
Discharge Pain Scale	Pain the patient now feels.	Set by user in the range 0-99.	
Discharge Status	How the case came to completion, e.g. treatment completed, funding ended, etc.	Set by user. List of possible values can be modified by Lead TM2 User. Values of "Referral Back to Source" and "Referred Back to GP/Consultant" recognised by BUPA report.	
Practitioner / Patient Outcome	How the outcome of the treatment is viewed separately by Practitioner and Patient.	Set by user. List of possible values can be modified by Lead TM2 User.	
Number of Treatments	How many treatments the case consisted of.	Set by TM2 to be the number of Consultations associated with the Case. Can be overridden by user.	
Discharge Letter Date	Date discharge letter was sent.	Set by user.	
Review Date	A date the case can be reviewed.	Set by user.	
Signature	Practitioner's signature.	Can be drawn graphically on screen. Best done on a touch screen with a pointing device.	
Discharge Notes	General free text notes.	Type in free text.	

The case can be closed off in the same manner as an individual consultation can using the [Close off Case] button.

Patient Discharge: Audit and Pathway Records

The features described here are required in order to generate the correct information for the BUPA report.

One of the requirements of the BUPA report is to record two items on discharge:

- ❑ That a Case has been audited.
- ❑ That a Standard Pathway has been followed.

An option in TM2 allows these items to be recorded.

Setup Required

In order for these items to be recorded, an option must be enabled in TM2 Options:

Tools -> TM2 Options -> Advanced Configuration tab

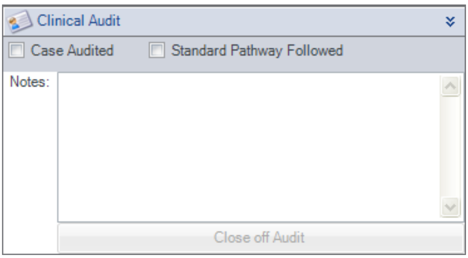
Within "TM2 Touch" group of options set "enable clinical auditing of cases" to true.

[Save]

Use Within TM2 Touch Discharge Screen

On the Discharge screen, open the Clinical Audit area by clicking on its button:

Select the Case Audited or Standard Pathway Followed box as appropriate:



Add any additional notes as required.

When both options have been correctly set for the case you may optionally close off the record in this section of the Case notes to prevent further changes by clicking on the [Close Off Audit] button.

Clinical Notes Print Options

The details of a case can automatically be printed out in one of several formats:

Print Option	Prints

Whole Case	- Patient summary
	- Admission details
	- Detailed notes from each consultation
	  - Date, practitioner
	  - Summary (Additional notes field)
	  - Detailed assessments and modalities
	- Discharge details

Admission Details	- Admission details.
Image	Either: - The current image selected or viewed (if Print "Current" is set to right of icon) Or - All the images in the case (if Print "All" is set to right of icon)

Consultation	- Patient summary
	- Detailed notes from currently selected Consultation (if Print "Current" is set) or all Consultations (if Print "All" is set).
	  - Date, practitioner
	  - Summary (Additional notes field)
	  - Detailed assessments and modalities

Case Summary	- Patient Summary - Summary (from Additional Notes field) for each Consultation.

To enable or disable the Print Preview option:

[Print] -> Print Preview

Dealing With Multiple Body Site Cases

In some situations you may be working with more than one body site for a patient who has several un-related issues. Road traffic accident victims are a common case of this situation.

It is possible for your Lead TM2 User to enable TM2 Touch so that you can have multiple TM2 Cases open at the same time, with each TM2 Case documenting your clinical notes for a different body area.

When enabled, this feature changes your TM2 Touch display, adding an [+ Add Body Site] button and an additional tab showing the chosen body site.

The Add Body Site Button

This button will create a new TM2 Case for this patient, initially with Body Site of “None Specified”. This new case is linked to the previous case (in this example with body site “Thigh”). The two body sites are now visible on the tab system and you can freely move between the two different TM2 Cases.

Linked Cases

Multiple TM2 Cases created in this way are linked together and are known as “Linked Cases”. Opening any one case in a group of Linked Cases will cause the tabs to appear for all Cases in the linked group.

Note that all Linked Cases have their own Admission, Consultation, Image and Discharge screens.

Creating Consultations in Linked Cases

To ensure your clinical notes are complete, you should always create a New Consultation in each of the Cases for which you provided treatment in a given appointment.

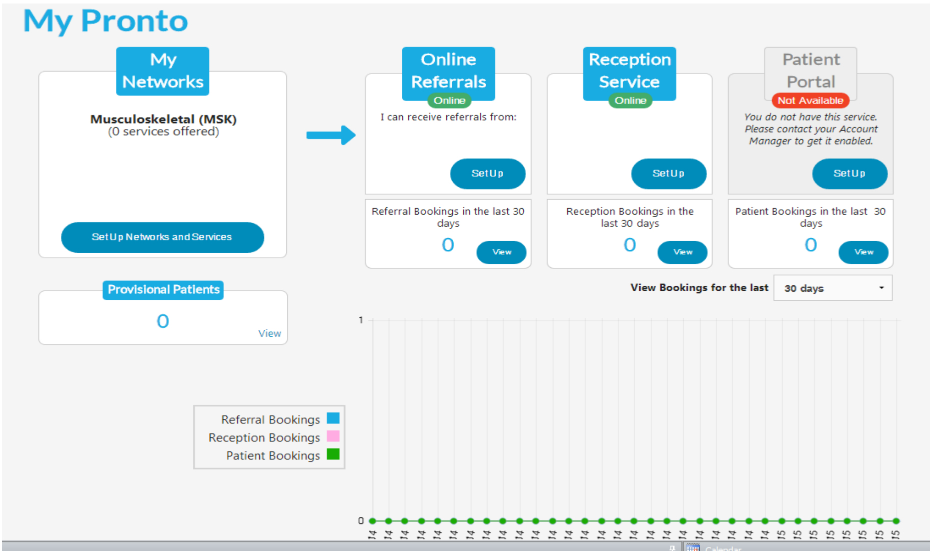
Linked Software

The Pronto-Network

In the 2015.01 version of TM2 there has been the addition of the "Pronto Desktop". This can be found under the **Admin** section (on the left) of TM2 and has the icon as shown below;

Once selected you should see a screen similar to the one shown below. There is a lot going on here so it may seem a little overwhelming but each section is explained further down.

** PLEASE CONTACT TM2 SALES FOR FURTHER DETAILS ON PRONTO OR VISIT http://www.pronto-network.com/



My Networks

A "Network" in Pronto is a grouping of disciplines and their corresponding treatments. You can see a complete list of Networks and their corresponding treatments at the page below;

http://tm2support.helpgizmo.com/help/article/link/networks

In a Network the treatments are standardized and then mapped into your own stock descriptions, durations and costing. For example, under Physiotherapy there is an Initial Assessment, you may call this First Appointment and another clinic may have named it Initial Consultation. When it comes to setting what you offer you can select the desired item, more on this later.

You cannot join a network yourself; you must contact the Pronto Helpdesk for this. It's very likely that you will have already have been enabled for the Musculoskeletal (MSK) Network already and in such cases it will show as it does in the image above. See below for how to set the services you offer under this network.

http://tm2support.helpgizmo.com/help/article/link/services-offered

Provisional Patients

This section only applies to patients who have registered via TM2 Online. There is on-going work to integrate the Pronto Network with TM2 Online so this area will have a little more weight in future versions of TM2 / Pronto.

Online Referrals

This shows the list of referrers that you have registered for on Pronto. You could be registered with a provider to receive patients but until we are made aware of this you cannot receive bookings via Pronto until we have set that up. If there are no providers appearing here and you feel there should be just contact the Pronto Helpdesk.

To adjust the referrer settings (or to create them initially) press the **Setup** option follow the guide below;

http://tm2support.helpgizmo.com/help/article/link/referrer-setup

Referral Bookings in the last 30 days

Shows at a glance the total bookings made by referrers. Clicking on **View** will show a more detailed list.

Linking To PhysioTools/ PhysioTec/ Salaso

Physiotools can be integrated with TM2 in order to make use of the built in exercise programs made available by Physiotools.

In order to link Physiotools with TM2, you will first need to get in contact with Physiotools themselves.

Details on how to contact Physiotools can be found at their website at http://www.physiotools.com/

The link requires that:

→ PhysioTools is installed on the local PC you are running TM2 from.

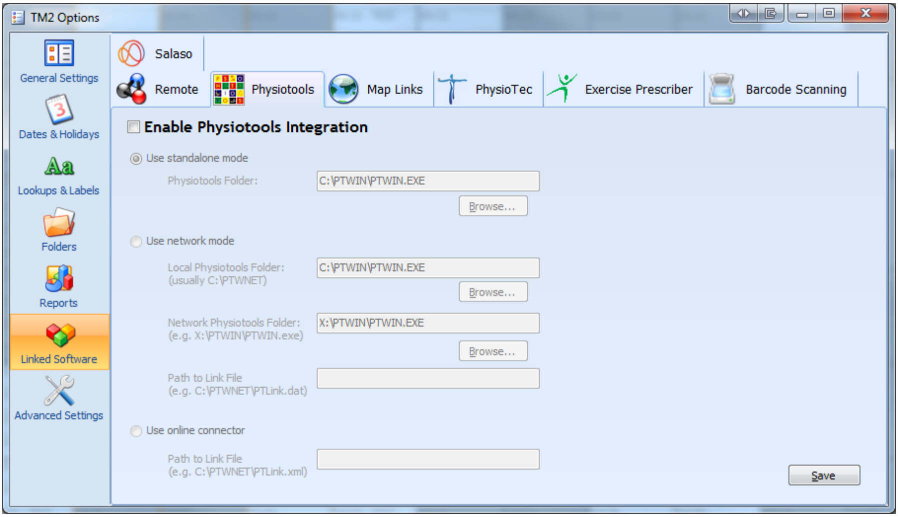
→ A patient's record in PhysioTools was created by entering PhysioTools from TM2. Existing patient records in PhysioTools cannot be linked to from TM2.

Setting Up The PhysioTools Link

TM2 needs to know where PhysioTools is installed on your local PC.

Go to **Tools > TM2 Options > Linked Software > PhysioTools**

You will then see the below screen



Click on the **Enable PhysioTools Integration** button and **Specify the folder containing the PhysioTools software installation.**

[Save]

Connecting TM2 with PhysioTools Online

• Download and install the PhysioTools Online connector from

http://www.physiotools.com/PhysioToolsConnector

- Open TM2
- Select Tools>TM2 Options
- Choose Linked Software on the left hand side
- Select the PhysioTools option
- Tick the box to enable PhysioTools Integration
- Choose Use Network Mode
- Enter the following details into the boxes
  - Local Physiotools Folder: C:\Program Files (x86)\PhysioTools
  - Network Physiotools Folder: C:\Program Files (x86)\PhysioTools\PhysioTools.exe
  - Path to Link File: C:\Program Files (x86)\PhysioTools\PTLink.dat

Note: the 'Program Files (x86)' only applies to computers running a 64 bit Operating System. If you do not have a 'Program Files (x86)' on your C drive, simply enter 'ProgramFiles'.

- Local Physiotools Folder: C:\Program Files\PhysioTools
- Network Physiotools Folder: C:\Program Files\PhysioTools\PhysioTools.exe
- Path to Link File: C:\Program Files\PhysioTools\PTLink.dat

Restart TM2

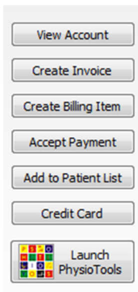
Using The PhysioTools Link

Enter a patient's record in TM2.

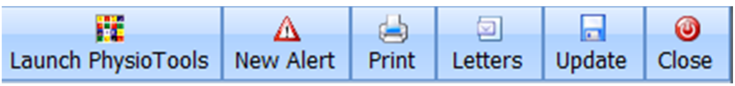
Click on [PhysioTools] -This link is on the right-hand menu.

If the patient does not have a record in PhysioTools that was created from TM2 you will be prompted to create their record.

If they do have a record created from TM2, you will be taken to their record in PhysioTools.



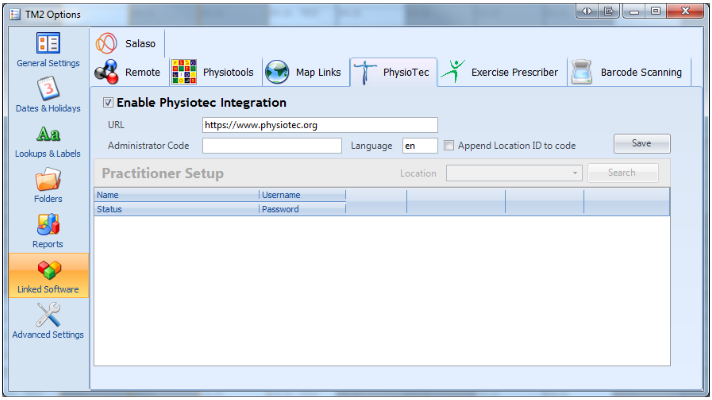
- On the patients records (and TM2 Touch cases, if you use TM2 Touch), you will now have a button to launch PhysioTools.



Linking to PhysioTec

TM2 also has an external link to the PhysioTec software. For more information on PhysioTec please refer to http://www.physiotec.ca.

Users, who wish to include a link to open the PhysioTec program from TM2, need to switch it on via the **'TM2 Options'** □ **'Linked Software'** □ **'PhysioTec'**.

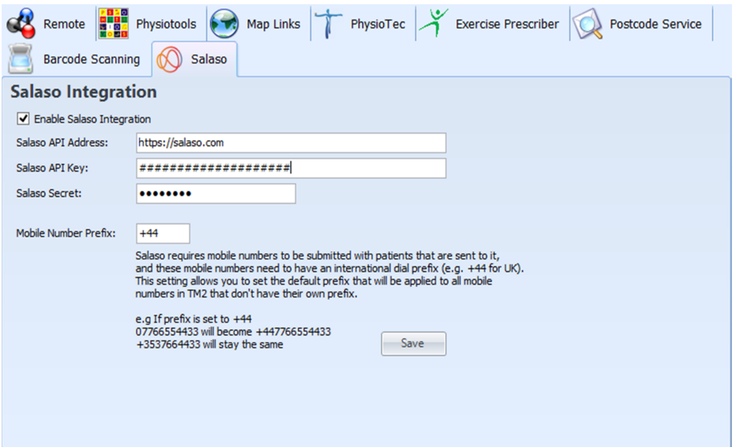


Once linked this gives users the opportunity to open the 'PhysioTec' link from both the patients and touch case records.

Linking to Salaso

TM2 also has an external link to the Salaso software. For more information on Salaso please refer to https://salaso.com/

This new feature is accessible via **Tools > TM2 Options > Linked Software > Salaso**:



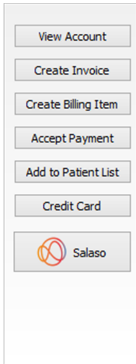
How it works*-

1. Register with Salaso https://salaso.com/
2. Enable Salaso Integration in TM2 Options
3. Enter Salaso API Address: https://salaso.com/
4. Enter your Salaso Api Key:
5. Enter your Salaso Secret
6. Enter Number Prefix: (+44)
7. Ensure you select ‘Save’
8. Restart TM2

* PLEASE CONTACT SALASO FOR LOGIN DETAILS OR VISIT https://salaso.com/

Using Salaso Link

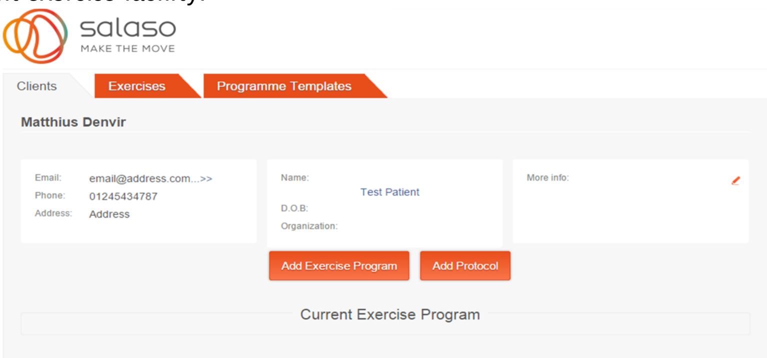
Patient Record



In TM2, open a patient record > on the bottom-right there is now a new button called ‘Salaso’
(See below) > selecting this will log you directly into the Salaso website with the credentials you entered in TM2 Options/Linked Software.
Or alternatively, you can access Salaso from a Patient Case.

Case Record

Once you select ‘Salaso’ it will then open the Salaso website where it will log into the Client exercise facility.



Appendices

Terminology Used

Phrase or term used	Means...
Click	click on something with the left mouse button
Right click	click on something with the right mouse button
Finances: Invoices View	go to the Finances section of icons on the left hand side of the display and select the Invoices icon.
Click on {Patient}	means select a specific Patient with the left mouse button
Double-click on {Patient}	means double click on a specific Patient with the left mouse button
right click on {Patient}	means select a specific Patient with the right mouse button
[Button]	click on this button
<u>Link Name</u>	click on this link
Menu -> Submenu	use a menu such as File -> Save
right click on {Item}, select "Command"	right click Item and select Command from the menu.
Patient Form, "Authorisation Codes" tab	go to the Authorisation Codes tab on the Patient Form
Menu -> Submenu (X)	(X) shows quick key that can be used for this function.
Fill in "Payment Method:"	Enter required details in this field.

When specific tasks are described, each step is shown with its own square box. For example:

Main - Patient view

Set search criteria (surname, postcode). Click [Search].

Confirm details with patient

If a step can be done using more than one method it will be described with a single square box:

Patient Form, Authorisation Codes tab.

or

Diary Event Form -> <u>Authorisation History</u>

Accessing TM2 Forms

TM2 uses various "forms" to enter data. The most common form names and where you can access them from are:

Form Name	Used for	Accessed From
Patient Form	Entering main details about a patient.	Patient View Double-click on {Patient} Diary View Right click on {Diary Event}, select "Go to Patient" Diary Event Form, View
Diary Event Form	Details of an appointment.	Diary View - double-click on {Diary Event} Patient Form, "Appointments" tab Double-click on {Appointment}
Billing Item	Recording purchases.	Patient (or Customer Group) Form [View Account] – "Billing Items" tab Patient (or Customer Group) Form [Create Billing Item]
Invoice Form	Creating an invoice from Billing Items. Reconciling payments to the invoice.	Finances: Invoices View Double click on {Invoice} Patient Form – [View Account] Double click on any invoice item Customer Group Form – [View Account] Double click on any invoices item
Payment Form	Recording payments. Printing receipts.	Finances: Payments View Double click on {Payment} Patient (or Customer Group) Form [View Account] Double click on any payment item Invoice Form Double click on a payment in Payments section.

Accessing Financial Forms

There are several places in TM2 you can access each of the three main financial forms:

Form Name	Used for	Accessed From
Billing Item	Recording purchases.	Patient (or Customer Group) Form [View Account] – "Billing Items" tab Patient (or Customer Group) Form [Create Billing Item]
Invoice Form	Creating an invoice from Billing Items. Reconciling payments to the invoice.	Finances: Invoices View Double click on {Invoice} Patient Form – [View Account] Double click on any invoice item Customer Group Form – [View Account] Double click on any invoices item
Payment Form	Recording payments. Reconciling the payment to invoices. Printing receipts.	Finances: Payments View Double click on {Payment} Patient (or Customer Group) Form [View Account] Double click on any payment item Invoice Form Double click on a payment in Payments section.

And Finally

We hope you enjoy using TM2.

If you have any questions about using the software and you are under our support contract, you are welcome to contact our support hotline which is open

8.00am - 5.30pm Monday, Thursday and Friday

8:00am - 8:00pm Tuesday and Wednesday

9:00am – 1:00pm Saturday

Phone: 033 33 44 2800
Email: support@insidetm2.com

* FOR MORE INFORMATION ON 2GETHER PLEASE CONTACT THE TM2 SUPPORT TEAM support@insidetm2.com

** PLEASE CONTACT TM2 SALES FOR FURTHER DETAILS ON PRONTO OR VISIT http://www.pronto-network.com/

If there are areas of TM2 you would like to see work in a different way then please contact us. It may be that we already have an option for what you need: if not then we will put it onto our list of enhancements to add to the product.

We always welcome customer feedback – we look forward to hearing from you!

Best regards,

The TM2 Team.