



## COMPASS INDEX

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# :Address Book Help:



## Address Book v. Client Data

Use the Address book to keep your **Personal & Business Contacts** separate from your **Clients**.

**Contacts** in the **Address Book** are those you pay (linked to your bank account) and friends, relatives etc.

**Clients** in **Client Data** are those who pay you for products and/or services.

You'll find many of the same features in the Address Book as in Client Data i.e. letters, photos, directions etc

Look up contacts - individuals or companies - quickly and easily using the A-Z buttons in the **Phone, Email, Address and Category Lists**

Keep track of **Tasks** that are related to your contacts.

They are linked to individual contacts which makes them easy to follow up on.

The **Bank Account** keeps track of your expenses and all your banking transactions.

Link payees to the Address book so they are automatically selectable as an expense.

Click on to go to a **website** or open a new **email**.

Customizable fields are for **important numbers** including: credit cards, bank accounts, passport as well as pins, passwords, frequent flyers and all other important numbers as well as relevant contact information.

**Misc info** are extra customizable fields. Use the check box to keep track of a change of address or RSVPs for example

Go to **Settings** (far right at bottom) to customize them.

Print them out as needed & keep under '**lock & key**' like the bank or a fireproof safe.

Insert **Directions** for any contacts you travel to.

You'll always have them conveniently on file for the next time you need them!

There's a **Notes** field for each contact. Tip: insert 'today's date' before adding a note.

**Contact info:** basic details. Quick & easy to copy/share.

Find/view all your **important numbers**. View as a list you can print out and keep in a safe place (like the bank) in case of need (a fire/hurricane etc.)

Insert up to 3 **photos** for each contact.

Tip: Import low resolution photos as high resolution photos take up a lot of 'hard drive space' and make backing up COMPASS a longer process.

**Emails, Letters, Envelopes & Labels** Headers and/or footers are inserted automatically from **Settings**.

Send simple mailings: a letter or email to a friend, change of address to some or all of your contacts.

**Note:** Copies of emails & letters sent from the Address Book are NOT saved. If you want to track these you'll need to print out a copy.



# :Address Book Help—Communications:



The 'Bottom Buttons' in are mostly about communications (letters & emails etc.)  
Important: Go to **Settings** first - to get set up.

## EMAILS

Type directions to (and from!) an address or paste them in from an internet search.

This way you can always give directions for frequently used places (your own home or office) to those who need them, and you'll always have directions to places you go to. You can insert an internet map as well as the words.

Send an email to a contact in your address book. Use the **Find** button to select a contact or a group and check it at one of the list screens. You cannot receive emails in COMPASS - just send them.

If you are sending the same email to a group you'll have to copy it to each contact (this will change in the next version of COMPASS).

Letters are saved until you type the next letter which automatically types over the previous one - so print out emails and letters if you need to keep a copy for your records or copy it into a 'Task' and save paper.

## SETTINGS

Enter your own information into the headers and/or footers at the **Letters, Labels and Envelopes Settings** screens.

If you have printed letterheads and envelopes then leave these fields blank.

Go to the **Email Settings** screen and enter all relevant set up information so that emails can be sent out directly from Compass. Include a 'signature' that has your contact information.

### DIRECTIONS

### EMAILS

### ENVELOPES

### LABELS

### LETTERS

### SETTINGS

## ENVELOPES

1. Select the envelope size.
2. Put envelopes in printer!
3. Click the Print button.
4. Check the correct size of envelope is selected when asked (in the 1st print dialog box).
5. Check the correct number of envelopes are set to print in the 2nd print dialog box.

See also **Printing**.

#10	International
C5	International
DL	International

International prints the country on the envelope.

## LABELS

1. **Select a group:** by **category** (Category List Screen)  
Or find all contacts with **addresses** (Address List screen).
3. Then return to the Address Book and click the Labels button.
4. At the next screen click **preview** to check how they look. Click on the rolodex (top left of your screen) to scroll through the **pages**.
4. Put labels in printer and click **print** - check "Records being browsed" is selected.

## LETTERS

Send a letter to one or more contacts in the address book. Use the **Find** button to select a contact or a group and check it at one of the list screens.

If you are sending the same letter to a group you'll have to copy them (this will change in the next version of COMPASS). Those letters are saved until you type the next letter which automatically types over them - so print out letters if you need to keep a copy for your records or copy it into a 'Task'. See also Letters.



# :Address Book Help—Lists:



There are two main kinds of lists that use information from the Address Book:

**Simple Lists** show contacts and phone numbers, emails, addresses or categories.

**Composite Lists** include contact info, birthdays + important numbers. They use more information and sort it in helpful ways. All lists are printable!

## SIMPLE LISTS

PHONE  
LIST

EMAIL  
LIST

ADDRESS  
LIST

CATEGORY  
LIST

First Name A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
Last Name A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
Company A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

You'll find different information at each list screen.

**Search** using the Find button or the A-Z buttons.

**Sort** lists using the pink headers

The **Print List** button uses a pre-formatted list format that saves paper

**Print** some or all of your contacts as a back up or for when you don't have access to a computer. The printed list is formatted to use as little paper as possible.

## COMPOSITE LISTS

Birth **dates** have to be entered for this button to work. Enter the correct year and you can be on top of those extra special birthdays like 21 and 50 etc.! Use this list to check whose birthday is coming up. Don't forget to add a brief note about whether you gave a card and/or a present so you don't give the same thing twice (unless maybe it's money!) Don't forget to insert the date before the note (Ctrl -) or Insert Menu: Insert Current Date.

Use these fields for important numbers so you can find them quickly/easily including: Credit cards, bank accounts, passport, driving license, frequent flyers, web site memberships and subscriptions, etc. Be sure to record any relevant contact information in case you have to replace vital documents or renew subscriptions etc. All Important Numbers headers are customizable.

Clicking the **View/Print All Important Numbers** button searches for all records that have any data entered into any of the important numbers fields. It takes you to a list showing the basic contact details and the important numbers. The list is sorted by Company Name and then individuals at the end by last name. Use the pink buttons to re-sort it.

Print out this list on a regular basis and **keep under lock and key in a safe place** alongside your house deeds etc. (at the bank for example).

**PHOTOS**



**Contact Info** **Copy**  
Jim Hoyt  
COMPASS  
PO Box 359  
Great Cacapon  
WV 25422, USA  
Work ph: 304 932 0499  
Email:  
jim@compass4us.com

**Contact Info:** This summary box allows you to share the basic contact details for a person or a company quickly and easily including: Name &/or Company Name, Phones, Fax, Email, Website.

Click in the field for it to automatically expand.

Click twice to be able to manually select some of the data.



## :Address Book Help—Miscellaneous:



There's a photo album (with 3 photos) available for each contact (like friends and relatives) in your address book.

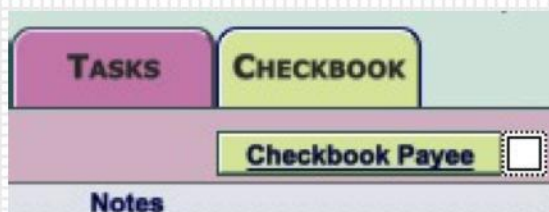
See also **Photos**.

The following lists in the Address Book are customizable:

- contact category (you can assign 1-2 per contact)
- state (the header is customizable - just click in it.)
- country (the header is customizable - just click in it.)
- task type
- task category

Your own lists are automatically saved when you upgrade.

See also **Lists**.



### **The Checkbook is for your 'Accounts Payable'**

Your Checkbook is linked to your Address Book - all contacts to whom you give money that are checked off in the Payee check box will appear automatically in the pop down menu at the Bank Account screen.

Use this feature to track all expenses & banking transactions.

See also **Checkbook**.

Keep track of simple tasks - of any To Dos or action items related to a contact. Keep these separate from your client based action items (To Dos in Client Data). You can have more than one task per contact.

### **Tasks in Address Book**

These tasks are 'not' related to your clients or the daily running of your practice. There's no limit to the number of tasks per client. They may need tracking over time like writing an article or filing your end of year accounts. You can use them for literally anything. I have one entitled Shopping (I keep all sorts of notes and links here), another called Referrals (for practitioners I frequently refer to) and another for Frequent Flyer Miles. You can keep copies of letters or emails here also

### **To Do List in Clients**

To Dos (client tasks) relate to the daily running of your practice and include calls & emails to return, cases to study and write up etc. They are limited to 1 per client at a time.

See also **Tasks**.



# :Address Book Help—Summary:



The Address book is only accessible from the Client Data (Advanced) screen.

Use the Address Book to keep details of **anyone who is not a client** including:

**Personal contacts** - family, friends etc.

**Professional colleagues**

**Companies** you pay for services and/or goods - restaurants, shops, airlines, hairdressers, phone companies etc. Check the Payee check box so they appear automatically in your **Checkbook**.

**Important numbers** - bank accounts, frequent flyers, tax ids and so on.

The **Main Address Book Screen** is the starting point for all your journeys around the Address Book. It looks similar to Client Data with contact information and notes etc.

There are **Tasks** (instead of To Dos in Clients) with the facility to link multiple tasks or projects to each contact and to track these over time unless you choose to delete them.

There are many **Lists** to help you locate and organize contacts quickly and easily: including Phone, Address, Category and Email - both email addresses are listed here as well as the web address.

You can **Write Simple Letters and Emails** although copies are not kept - you'll have to print them out if you wish to keep a record of them - or you can copy important emails or letters into a Task. Please let us know if you'd like to be able to keep copies in Compass (as you do with clients) and we'll add it to our To Do List! You can send single letters, or write to a small group or send a mailing shot to your whole address book.

Use the **Labels** to send invitations, holiday cards or a change of address mailing to one person, a select group or your whole address book.

Print out your whole address book using the paper-saving **Contact Information** screen. You'll have a paper record for when you don't have access to your computer.

Print out all your **Important Numbers** to have a paper copy your most important data. Printed information that includes important data (especially Important Numbers) needs careful attention. Put it in a Very Safe Place in case of need: a theft, fire or computer failure for e.g. Make sure you file this in a fireproof safe at home or at your bank. Do not leave it lying around and do not file it in any accessible place in your office or home (even a filing cabinet).

Track **Birthdays** - check it from time to time so you don't forget important dates.

Insert 3 photos per contact in the **Photo Album**.



# :Age & Sex Report Help:



## REPORTS

## AGE & SEX

Day/Month/Yr 14 May 1998 7 Sex M

Click on the Reports button at the bottom of the Client Data screen and then the Age & Sex tab to access this report.

### :Age & Sex Report:

See at a glance how many clients are female and how many are male in each age group

Saturday November 26, 2005			Total Clients 487																			
Sex	Count	%	0-9	%	10-19	%	20-29	%	30-39	%	40-49	%	50-59	%	60-69	%	70-79	%	80-89	%	90 +	%
F	302	62.0	49	16.2	27	8.9	19	6.3	40	13.2	61	20.2	70	23.2	20	6.6	8	2.6	6	2	1	.3
M	185	38.0	73	39.3	27	14.6	10	5.4	14	7.6	17	9.2	20	10.8	17	9.2	5	2.7	0	0	1	.5

The Age & Sex tab will only work if you have clients entered with correct birth dates (day, month & year) in Client Data. This report searches for the birthday to find clients - and it excludes all Non Current clients (Audit Data category).

Total number of current clients - and of those the number (and percentage) that are male and the number (and percentage) that are female.

The numbers and percentages - of males/females - are calculated for each age group: 0-9, 10-19, 20-29, 30-39, 40-49, 50-59, 60-69, 70-79, 80-89, 90+

### Uses of Age & Sex Report

Identify which groups of client you attract - breaking that down further to help you make marketing and PR as well as continuing education decisions!

If a large group are male children in the 0-9 age category and their No. 1 complaint is Autism, then arranging to talk to local Autism Support Groups makes sense.

If the largest group of women are in the 40-49 age group and their No. 1 complaint is menopause then writing an article for a local paper on menopause and homeopathy might be worthwhile. Are there any obvious age or sex gaps in your practice that you want to 'fill in' - you might want to brainstorm about doing this with a colleague.

### View & Print the Report

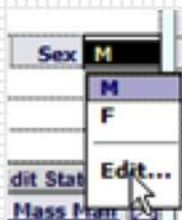
Click **Continue** in the Status Bar (to the left of screen) and follow the Print prompts in the print dialog box. Click **Continue** in the Status Bar a second time when asked in order to print.

### View the Report

Click **Continue** in the Status bar (to the left of the screen) and then **Cancel** in the print dialog box to simply view the Age & Sex chart. Then click **Continue** in the Status Bar once more to return to Client Data.

### Additional Categories

For homeopaths also treating occasional animals additional categories under sex can be added i.e. D for dog and C for cat etc. Veterinarians or Homeopaths treating lots of animals should inquire about how to use COMPASS for Veterinarians - this program has the capabilities to do so.





# :Appointment/Treatment Summary Help:



LISTS

APPT/RX  
SUMMARY

TREATMENT  
SUMMARY

This feature saves a tremendous amount of time trawling through notes to find what you gave, when it was given and whether it worked.

Click on the Lists button at the bottom of the Client Data screen and then the Appt/Rx Summary tab to get to this summary or go straight there from Treatment Summary.

Treatment Summary Sheet - Dec 20, 2005				Name: Nick Angelo			DOB: Sep 4, 1994		
Date	Type of Consultation	Presenting Complaints	Date of Rx	Remedy			Response	Agg	L of C
Feb 1, 03	First Appointment	ADD	Mar 13, 03	Sulph.	30C	Acute	Pos. curative		<input type="checkbox"/>
Mar 1, 03	Follow Up Appt: Phone	ADD	May 15, 04	Ign.	1M	Chronic	Partial (close)	Mild	<input type="checkbox"/>
May 15, 04	Follow Up Appt: Office	ADD	May 15, 04	Kali-p.	30C	Int/Current		Mild	<input type="checkbox"/>
May 20, 04	First Appointment	Acne	Jul 20, 04	Abrot.	12C	Acute Exac.			<input type="checkbox"/>
			Feb 3, 05	Abel.	LM 6		Pos. curative	Moderate	<input type="checkbox"/>

View and print out a **master list of each appointment and every remedy given.**

All Appointments & Remedies are listed in date order with the following information:

Date and Type of Consultation	Date, Remedy Name and Potency
Top 2 Presenting Complaints	The Type of Remedy (Acute/Chronic etc.)
	Quick Response Note
	Aggravation and Law of Cure check box

## Uses

Keep track of a client's history.

Review a client's case or write up a summary for a presentation or paper.

Include as a summary sheet in a client's paper file/chart.

If a client transfers to another practitioner send a copy by mail or email (pdf).

Print PDF

## Smart Printing = Paperless Printing

Save paper by creating a pdf and emailing it to the practitioner who is seeing this client.

1. Click the **Print PDF** button
2. **Name the file** - client's initials and today's date.
3. Select **Current record**
4. Check the box that Automatically opens the file after saving so you can check it.
5. Click **Save** (we suggest you save it to your desktop and delete it once you have sent it - to avoid your computer ending up with a lot of unnecessary files on it).

File name:	Untitled	Save
Save as type:	PDF Files (*.pdf)	Cancel
Save:	Current record	Options...
Appearance:	Records being browsed	
	Current record	
	Blank record	
After saving:	<input checked="" type="checkbox"/> Automatically open file	

When the pdf opens you may see a number of blank pages after the first with your client's information on it. Just ignore those. They cannot be deleted.



# :Appointment Timer Help:



## TREATMENT SUMMARY

The **Appointment Timer** is on the Treatment Summary screen. Use it to time appointments or tasks for which you are charging.

Appointment Timer					
Click Start				?	Clear
Start	Stop	Resume	Stop	Total	

Click on **Start** and the Timer will keep going until you click the **Stop** next to it. Once you do so the total number of minutes that have passed will pop up in the Total box.

Click **Resume** and then **Stop** for additional minutes to be added to the **Total**. You can Resume and Stop as often as you want.

### Uses

Keep track of the time you spend on scheduled or unscheduled appointments.

Resume & stop as often as you need to until you decide to charge for the time that has accrued.

Give clients precise information about invoiced charges and length of time spent.

Telephone 'acutes' can run on for a few days, brief follow-ups can take longer than a couple of minutes.

Keep track on the time spent responding to emails. They can be a huge time drain - make sure you aren't inadvertently being too generous.

Even if you don't charge for these 'extras' it is good business practice to let people know how generous you are being so that they don't take you for granted.

Date	Type of Appointment	Time
Jul 16, 2005	Acute Appt: Phone	.75
Dec 28, 2003	Follow Up Appt: Office	.50
Nov 14, 2003	F/U bet appts: Ph/Email	N/A
Oct 8, 2003	First Consultation: Office	2

Once you are done add the time spent to the Case Notes Summary (Case Notes or Treatment Summary layouts) or the Time field - click twice in that field to type a time that is different from those in the menu. You can then create an invoice based on the time spent. **Tip:** Only create invoices for 'timed appointments' that way you'll be able to easily double check whether a client has been charged for time spend. Or not. If you have spent an hour, say over a week with a half hour appointment on one day, and one 5 minute and one 10 minute conversation on other days your can make a note of that in the case notes.

Timer		
	?	Clear
Stop	Total	

Click the **Clear** button once you are done for all data for this client's timer to be deleted



# :Business Card Help:



Biz cards are not currently available in A4 format

## SETTINGS

Address Book

Business Card

Calendar

Client Data

Email

Envelopes

Inventor

From Client Data (Advanced) click on the Settings tab (bottom right of screen) then select the Business Card button on the Settings Bar.

Instructions for Business Cards may be found at the Settings page itself.  
Below are a few formatting reminders and design tips.

### Uses

This feature is useful if you want to print a small number of business cards (50-100), where ordering from a commercial printer (with a minimum of 500) would be wasteful.

### Design your Business Card

Type In The Details First That You Wish To Appear On Your Card.

Use The Format Menu (at The Top Of The Screen) To Select The Font Size, Color, And Style As Well As Align The Text Left/right Or Center And To Set Spaces Between Lines.

The Text ... option selection at the bottom of the Format Menu gives you all text formatting options conveniently in one box.

Highlight the text you want to format first then right click or go to the Format menu.



### A few design tips!

- Your business card and letterhead should 'match' i.e. same font, font color & style.
- Text on cards can be formatted into a smaller font size than you'd think possible.
- And all text should be easily legible!
- Print out a test version on scrap paper first

The Logo option is for if you have a .jpg/.png (or similar graphics file) of a business card from your designer or printer. You have to choose whether to use the Logo **or** the Text option on the front of the card i.e. you cannot use both in the same 'space'.

Be sure to purchase the correct Avery 8371 (or equivalent) Business Cards.

Business Cards and Labels are not currently available in A4 (UK) format.



# :Calendar Help:



Click on the **Calendar** Tab in **Client Data** go to the last date you were viewing.

Click **New Appt** to go to today's date.

If a client has an upcoming appointment it will automatically be displayed here.

<b>CALENDAR</b>	<b>New Appt</b>
<b>Next Appt</b>	<b>Wednesday, December 10, 2008 at 1:00 PM.</b>
<b>Last Appt</b>	<b>Sun, Nov 2, 2008</b>

Check a client's last appointment date at the Client Data screen i.e. without having to go to the Treatment Summary screen.

Familiarize yourself with the various views (Day, Week, Month, Year and Schedule) by clicking on the tabs.

Go back to Client Data

The **Schedule View** is a variation of the **Day View** where you can see the actual 'sizes' of the appointments as opposed to a list.

**:Calendar - Daily View:** Search Print Daily Appointment List Help

CLIENT DATA DAY WEEK MONTH YEAR SCHEDULE CALENDAR SETTINGS

**Thursday, December 29, 2005**

Scroll Up

Date	Times	Client	Description	Type
Dec 29	10:30 am ~ 11:30 am			Appointment/Phone
Dec 29	11:30 am ~ 12:00 pm			Appointment
Dec 29	1:00 pm ~ 3:00 pm			Appointment
Dec 29	5:00 pm ~ 6:30 pm			Appointment/Phone

Day View: Appointments show as a list and as shaded blocks in the 'time bar'

Using color for appointment types helps you see at a glance what type of appointment is scheduled

Click on any day in any month to go to that day

Click on the blue arrows to 'toggle' through the months

A blue dot next to a date shows that one or more appointments are scheduled on that day

The yellow and green shadings only show in the center month i.e. the month or week you are currently viewing.

November 05

M	T	W	T	Fr	S	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

\* December 05 \*

M	T	W	T	Fr	S	S
	1	2	3	4		
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

January 06

M	T	W	T	Fr	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Scroll Down

■ = Date selected ■ = Today ■ = Today selected • = Appointment present



# :Calendar Help—Create/Edit Appointments:



Click on a time in the appointment bar to **create an appt.**

Appointments can be scheduled every 15 minutes.

Click on any scheduled appointment in any view in order to **edit that appointment.**

You will be taken to the same mini screen whether you are creating or editing an appointment.

**Select the times for an appointment & appointment type.** As you select each field the next one will automatically and helpfully pop down in the correct order! Or you can use the tab key.

If you select the New Appt button (at Client Data) to go to the Calendar then the name of the client you were viewing will appear here. Click the green button to select this client for this appointment (or Find a client - see below).

**Find a client** by typing in the first 2-3 letters of a last name and click the yellow **Find** button (or **Enter** on your keyboard).

Click on a name to select that client for this appointment. Click again to 'deselect' it if you make a mistake or want to select another name.

Click **Done** to save an appointment and return to the Calendar. Click **Delete** if you make a mistake and want to start again. Click **Duplicate** for repeating appointments

If you have 2 clients with the exact same name you will have to check the ID number to make sure you have scheduled the correct client for this appointment.

You can change the dates/times any time. Check that you don't cause a scheduling conflict when you do so. Scheduling conflicts will only show on the Schedule View (a red line).

**Tips:** Use the **Description** field for a note. The first few lines will appear in the printed list. If you don't have a client entered yet then use this field to 'pencil in' their name. If the appointment is to be confirmed then **do not select a type.** You'll can see easily which appointments need checking because no color is selected.

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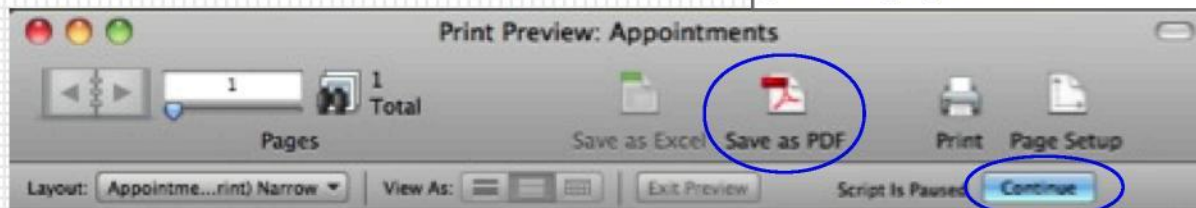
## :Calendar Help—Print Appointments:



### Print Today's Appointments

Click on **Print Today's Appointments** (top of screen) to go to the Print Preview Screen.

Click **Continue** in the Status Bar (above) to print the list. Or select PDF if preferred. You can **Cancel** in the print dialog box if you change your mind.



### Appointments for Thursday—July 1, 2010

10:00 AM ~ 11:00 AM	Appt - Gainesville Randini Castro Fidel Castro	Home: 954 532 3636 Work: 352 505 8545 Cell: 954 732 8620 Email: zone80@cox.net	ROC
11:00 AM ~ 12:30 PM	Appt - Gainesville Daniel Castro Mother Betty	Home: 954 532 3636 Work: 954 584 1106 Cell: 954 547 4633 Email: mirandacastro@aol.com	FOC
12:30 PM ~ 1:30 PM	Personal		— LUNCH —
6:30 PM ~ 8:30 PM	Meeting		
8:00 PM ~ 9:00 PM	Personal		

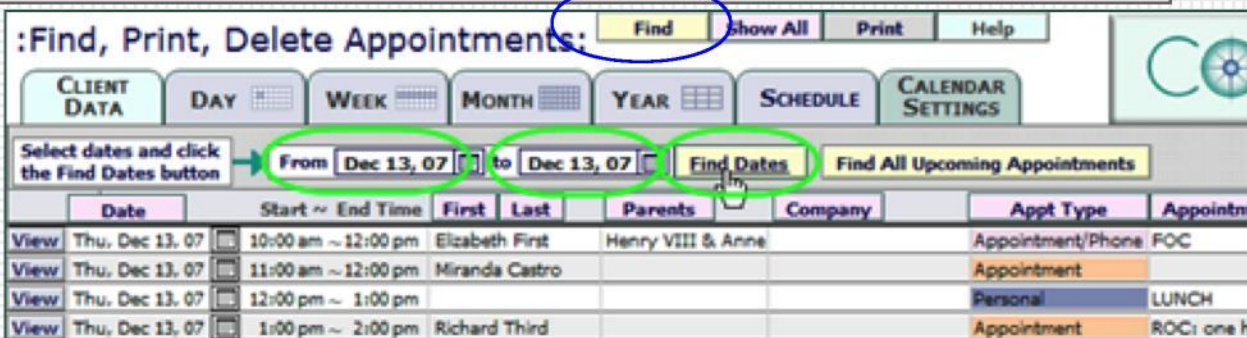
#### Uses:

Give this list to your receptionist to confirm upcoming appointments. A printed list of a selected day's appointments will show the following:

- Start and end time of each appointment.
- Type of appointment and Name of Client.
- + the Parent's name if the client is a child and/or a Company name
- Phone numbers (home/work/cell), Email & the first few lines of a Note.

*Only the times scheduled will show i.e. 'empty time slots' will not show.*

To print a 'custom' list showing a few days or a week's appointments, click **Find** to go to the Search Screen. You can search there for dates, or types of appointments etc. Keep it simple to start with and just search for dates.



Type the same date into both fields to search for one day's appointments then click **Find Dates**. Type different dates in each field to find a range of days. The appointments will automatically sort by time and date. Use the pink buttons to re-sort them. Once you are happy with the list click **Print** and follow the directions above.



## :Calendar Help—Searching:



### Quick and Easy Search for Dates

Click the yellow **Find** button at the top of any of the Calendar screens to go to the Search screen. Using the 'drop down' calendars enter dates into the date fields and click the **Find Dates** button next to the date fields.

Make both dates the same if you want to see one day or a range of dates as required.

You can also click twice in the date fields and type the dates in manually (MM/DD/YYYY)

### Find All Upcoming Appointments

Click this button to view all upcoming appointments.

You can then sort the appointments by clicking on the pink headers.

### More Complex Searches

Use the **Find** button at the top of the Search screen to search in the appointment fields themselves. You can search for a client, an appointment type, a description etc.

If you want to find all appointments at a certain clinic or practice on certain dates enter the dates as MM/DD/YYYY...MM/DD/YYYY (including the periods ... with no space either side), then select an Appointment Type and click the Enter button (or the Enter Key on your keyboard). Use the pink headers to sort the list.

You can also then click the print button to print just these appointments.

### Delete by Year

#### Be Afraid, Be Very Afraid

You can Delete a year's appointments in a heartbeat. Deleted appointments can never be retrieved. If you click this button you will be asked to type in a year - and given an opportunity to cancel at the next step in case you change your mind.

Back up COMPASS first just in case you make an inadvertent mistake. You can never be too cautious, or too fastidious when deleting data.

#### DELETE WITH GREAT CAUTION

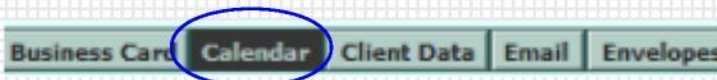
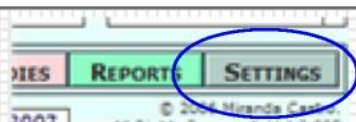
Are you sure you want to delete all the appointments for the year 2004?  
Remember - all deletions are final - there is no undo/recover facility.  
Click cancel if you are not sure!

Yes Delete

No Cancel



# :Calendar Help—Settings:



## CALENDAR SETTINGS

Click on the **Settings** button in Client Data (bottom right) and then **Calendar** Settings or click on the Settings tab at any of the Calendar screens to go straight there.

### Color-coded Appointments

Customize the colors of appointments to make it easy to identify them at a glance:

1. Click the New Appointment Type button
2. Name the Appointment Type.
3. Select a color from the drop down list.

### Select Color

This column shows the color/colours you have chosen and the type of the appointment for each color/colour. You can change them any time.

### A Note about the Colors/Colours

There are 22 colors available.  
You cannot change the pre-set colors/colors or add to them.



### :General Settings:

Start Week on Monday ☒ Yes ☐ No

Select Current Date on Start Up ☒ Yes ☐ No

Show Conflicts on Schedule ☒ Yes ☐ No

Show appointment times starting at: 9:00 am

Select additional **General Calendar Settings**:

- Start the week on a Sunday or Monday
- Select for the Calendar to go to 'Today' on opening it (or not)
- Show conflicts on the schedule \* (or not)
- Choose a time to start your day and click the green **Apply** button - the first appointment of the day will show your chosen time in all views

\* Schedule View only



# :Case Notes Help:



Click on **New Case Note** to create a new appointment/case note.

Click on **New Note Plus Complaints** for follow up appointments where the complaints have not changed - they will automatically be entered into the complaints fields.

Today's date automatically enters when you select a New Case Note. You can change the date in Case Notes or Case Details but not in Treatment Summary.

Name, Date of Birth, Age & Client ID automatically enter. Enter summary details for each visit at the Case Note or Treatment Summary screen including:

- Type of Visit and Time Spent
- Quick Response (for follow up appointments only)
- The top 1-3 Presenting Complaint/s

The drop down lists (type of appt, time, response & complaints etc) are editable, click on **Edit Menus** button to do so.

Create a new Case Note at the **Treatment Summary** screen or at the **Case Notes** screen.

Date	Type of Appointment	Time	Response	Presenting Complaints
View Jan 10, 2006	Client Notes	1.5	N/A	Alopecia Infertility
View Jan 10, 2006	First Appointment: Office	1	N/A	Acne Addiction Anemia

Type the case notes into this field in a way that is easy for you to read and review.

You can return to symptoms or sections and add more information as you take the case without worrying about whether you are leaving enough space.

The maximum amount of text you can enter is about 12 pages a visit.

Jump from one visit to the next or a previous one. See which visit you are currently viewing as well as the total number of "visits" for this client.

Date	Type of Appointment	Time	Response	Presenting Complaint/s
Jan 10, 06	Client Notes	1.5	N/A	Alopecia Infertility

**View 2/4 Appts** is for scrolling quickly through the first few lines of all of a client's notes.

View 'Full Screen' gives you a larger case field and a clutter-free screen i.e. hardly any buttons.

Highlight an important word, phrase, sentence or paragraph and click this button. The highlighted text is copied into the Themes &/or Keynotes field.

List keynote symptoms and/or themes here, or paste in rubrics from a repertory program.

This information is retained in all visits for a client.

Write a summary for each appointment including:

- observations and assessment
- recommendations or referrals
- a plan - including the remedy choice
- when & how the client is following up.

See Summary Notes Help



# :Case Notes Help—Features:



These are 'busy' screens with lots going on. Don't panic! You will quickly become familiar with their many useful features. There are a several case note screens.

**:Case Notes:** Print Appt Print All Appts Edit Menus Help Friday July 2, 2010

**CLIENT DATA** **TREATMENT SUMMARY** **CASE NOTES** **CASE DETAILS** **VIEW 2/4 APPTS.** **REMEDY DETAILS** **RESEARCH** NEW Note Forms Graph

Name Elizabeth First DOB Feb 8, 1558 45 Parents Henry & Anne ID 1

**Case Notes** is the screen many users like the best. You can get to most places you would want to get to: to Client Data, Treatment Summary, Remedy Details (where you will see only this client's prescriptions), Repertorizing Graph, Research and Forms. The main fields are:

- Case notes: a good sized field for taking case notes.
- Summary Notes: for your assessment and plan etc.
- Themes/Keynotes: a summary field to use any way you would like.

Case & Summary Notes fields are different (new) with each new note. Themes/Keynotes do not change - this field is the same at each case note.

**:Case Details:** Print Appt. Print All Appts. Edit Menus Help Friday July 2, 2010

**CLIENT DATA** **TREATMENT SUMMARY** **CASE NOTES** **CASE DETAILS** **VIEW 2/4 VISITS** **REMEDY DETAILS** **RESEARCH** **STORED DOCS** **VITALS REPORT**

Name Elizabeth First DOB Feb 8, 1558 45 Parents Henry & Anne ID 1

**Case Details** is similar to Case Notes with more options. Each field is smaller so less text is visible i.e. you may have to do more scrolling. In addition to Case & Summary Notes, and a Themes/Keynotes field you will also find at this screen:

- Analysis field (a second field that is the same at every visit)
- A list of remedies (a mini version of the list at the Treatment Summary screen)
- Photos & Photo notes (there are 3 per visit - click to view the mini-album)
- A snapshot of the Repertory Graph (click on the Insert Graph button to view it)
- 'Vitals' - height, weight, temperature, blood pressure, pulse, respiration.

There are plenty of links - to a history of vitals, to the photos, and to any stored docs.

**Date** Jan 30, 06 **Type of Appointment** First Appointment: Office **Time** 1:00 **Response** N/A **Age** 45 **Presenting Complaint/s** Addition Anemia

**Themes/Keynotes** **Analysis**

Power Envy  
Rubeola chosen  
Allments d. parent  
Vivacious  
Superstitious  
Insolent contrast.  
to music or dancing  
Flowers  
Sens. colors/pain  
in sweats  
Lead poisoning  
Decayed teeth  
Royal/religious power  
Graph limited to  
Syphilitic remedies  
(b/c of sex and  
inherited weakness)  
Comparative MM  
Pituit  
Aut  
Ment  
etc.

**Summary Notes**

At V strong vital force considering early brushes with loss and exile.  
Largest living monarch ever (at the time).  
A powerful woman with remarkable achievements.

Date	Remedy	Potency	Dose	Repeated	Success	Days	Wtd/Dry	Category	Cost	Response	Aggravation	LoFC
Wed Jan 10, 06	Thuco	12C	Repeated	1st		6	3	Chronic	1.90			

**Vitals** **Settings**

Height 5-6 ft-in Weight 145 lb Temp F Pulse Rate & Description  
Blood Pressure diastolic/systolic Respiration Rate & Description

**Repertorizing Graph** Insert Graph

**Photos** Photos

Elizabeth's coat of arms, signature and coronation portrait.  
Elizabeth's arms were the same as those used by Henry 8.  
Quartered: Azure three fleurs-de-lis Or (for France) and Gules three lions



# :Case Notes Help—Insert a Repertory Graph:



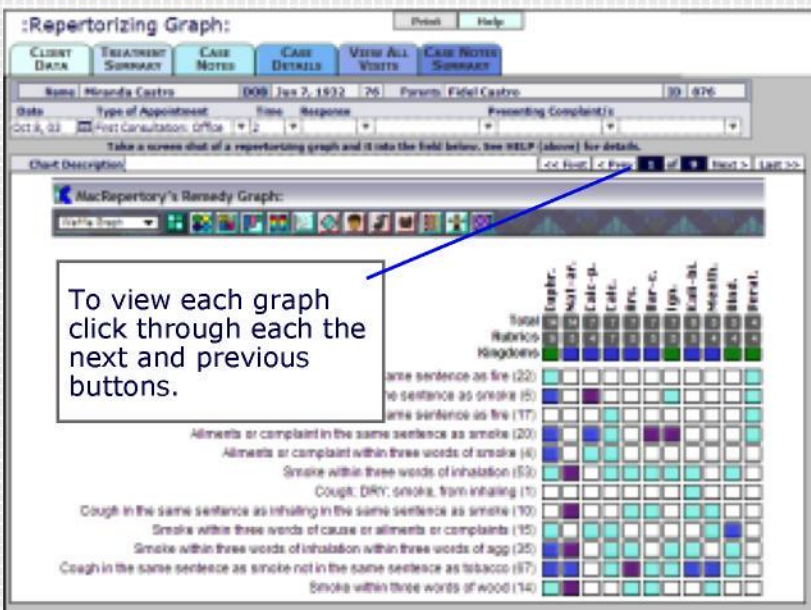
## Insert Graph

Insert a Repertorization Graph from any of the homeopathic software programs by taking a Screen Shot of the graph and then copying it into Compass.  
You can only insert one graph per client visit.

### MAC - Take a Screen Shot

1. Press **Shift + Command + 4**
2. Click & drag over the graph using the 'crosshair.' This creates a jpg format file called Picture on your desktop. This is an invisible process.
3. Insert into the graph field in Compass by going to the **Insert** Menu  
Select **Picture**  
**Locate the file** (on desktop)  
**Click Open**
4. Or 'paste' in directly

Click in the graph field first so COMPASS knows where to paste your screen capture!



### WIN - Take a Screen Shot (using print screen)

Move the graph you want to copy to the top left hand corner of the program and minimize the program to the size of the graph (see below).

1. Press **alt + prt sc** or **fn+alt+prt sc** The Print Screen key is at top of the keyboard. A picture of the program not the whole screen is copied to the clipboard. This is an invisible process
2. Go to the **Insert Graph** screen in COMPASS
3. Paste it (**Edit Menu/Paste Bitmap** or **Ctrl + V**) into the client's Repertory Chart.

Or you can purchase a low cost, easy to use program like SnagIt that takes screen shots and lets you edit/crop them easily. SnagIt is available from: [www.techsmith.com](http://www.techsmith.com)

There are also a numerous free screen/window capture programs available. MWSnap is getting great reviews especially because it doesn't require 'installation' and therefore does not need any special drivers or system files which can mess up your computer. MWSnap is available from: <http://www.mirekw.com/winfreeware/mwsnap.html>

If these programs don't work for you a simple search on Google is always fruitful!

Contact your homeopathic software company as many programs now have a built in facility for taking screen shots of graphs.

**IMPORTANT NOTE:** Insert low resolution graphics (images) if possible. High resolution graphics make COMPASS big - a huge program that takes up a lot of space on your computer (on your hard drive) and will quickly become unwieldy to back up.



# :Case Notes Help—Printing Case Notes:



Print Appt.

Print All Appts.

Print out one appointment or all appointments for a client. The Print buttons are located at the top of the Case Notes screen. If you change your mind after clicking OK (Print Appt.) or Full or Short (Print All Appts.) you can cancel printing in one of the next dialog boxes.

**Print Appt.** This option prints the Case Note as well as any text in Themes/Keynotes, Analysis and Summary Notes for one appointment only. It does not print the remedy.

Print All Appointments for This Client

Select Full or Short below then follow the prompts to print.

Full: Date & Type of Appointment & Presenting Complaints  
Case Notes + Themes/Keynotes + Analysis  
Summary Notes  
Date & Name of Remedy & Response

Short: Date & Type of Appointment & Presenting Complaints  
Summary Notes only (i.e. no Case notes etc.)  
Date & Name of Remedy & Effect

Cancel Full Short

## Print All Appts.

**FULL:** prints the following:

- Date/Type of each Appointment + Complaints
- Case Notes
- Themes
- Analysis
- Summary Notes
- Date/Name of Remedy + Response

**SHORT:** prints the following:

- Date/Type of Appointment + Complaints
- Summary Notes
- Date/Name of Remedy + Response

i.e. it does NOT print the Case - just the summary fields.

After selecting Full or Short you will receive this short reminder/message!

Preview & Print the Case Notes

To PREVIEW all the notes/summaries/remedies for this client click OK. At the next screen click the 'pages of the rolodex' in the Status Bar to scroll through this client's case notes.

Click 'Continue' in the Status Bar to go on to print.

You can cancel the printing in the next dialog box if you wish.

## Paperless case notes

'Print' to a pdf that you can email to a patient, colleague, supervisor etc.

Click **Continue** to go on to print or to cancel and return to Case Notes or Case Details. If you select Full (all appointments) for a client you have been seeing for a while make sure you have enough paper in the printer.

Once you select **Full** or **Short** (Print All Appts.) you'll be able to review the case notes at the **Preview Screen** - to see how they'll print out. Use the **Rolodex** in the status bar (at top) to scroll through the pages.

The 'Page numbers' show how many pages there are in total and which one you are currently viewing.

Patient Summary

Pages: 1 / 7 Total

Save as Excel Save as PDF Print Page Setup

Layout: Long Summary View As: Exit Preview Script Is Paused Continue

Summary for Elizabeth First ID: 1 DOB: Feb 8, 1558 Jul 3, 2010 - Page 1

<b>Themes and Keynotes</b>	<b>Analysis</b>
Power	Rubrics chosen
Exile	
	Ailments d. parent
	Muscle



# :Case Notes Help—Case Taking Fields:



## Case Notes

Record your patient's words as faithfully as possible.  
Record your questions or leave a line space to show that you asked one.

Add your own thoughts and observations in brackets/parentheses.

Use notations for common responses: ! = pt smiled, !! = chuckled, !!! laughed a lot. This is helpful if the subject matter is sad or serious. Or use emoticons :- ( for sad and so on.

Use CAPS for loud/shouting

Use numbers for underlines for **spontaneity, intensity & clarity** of symptoms:

Chilly -3- ... > meat -2-  
I'm terrified of falling -4-

## Themes & Keynotes

*Information in this field stays the same across all visits.*

Pull out of the case the important symptoms, keynotes, words, themes and phrases.

Group them so that they 'make sense' - arranging and rearranging them until they accurately reflect the whole person.

Reflecting this back to the patient (in a kind, accessible, respectful way) can be tremendously healing - and affirmative.

## Analysis

*Information in this field stays the same across all visits.*

Take your final lists/groups from Themes & Keynotes and translate into rubrics.

List the key rubrics chosen (and why). You can copy whole rubrics from your repertorizing program (or paste a chart into the Insert Graph screen).

Comparative Materia Medica: write up the remedies considered and why here.

List any obstacles to cure, or prognosis, etc.

These are just suggestions - you can use these fields any way that suits the way you work and think.

Date	Type of Appointment	Time	Response	Presenting Complaint/s	Edit Lists
Jul 17, 05	<input type="checkbox"/> Acute Appt: Office	1		Sore throat	

End	Top	Appt	2 of 6	<< First	< Prev	Next >	Last >>	Add Keynote	Themes/Keynotes	Analysis
<p>My throat is killing me It's so so painful - nothing relieves the pain but nothing It came on suddenly yesterday morning - I just woke with it I couldn't even sleep last night the pain was so bad I broke up with my girlfriend yesterday because she cheated on me We'd been going out for 4 years I never felt jealous before - I've been seething with it Which side is worse - it's only on the left side</p>									<p>Killing Jealous Sudden onset Left side</p>	<p>Sulphur (constitutional remedy)  Lachesis - b/c strong etiology, modality</p>

Entering a Theme or Keynote into the Themes/Keynote field.

1. You can click directly in the field and type into it.
2. Or you can click the **Add Keynote** button and a new screen opens up. You can scroll through the case highlighting key words/phrases or more and clicking the Add Keynote button again - the highlighted text will pop into the Themes/Keynotes field.
3. You can also select text in another program (eg, Word, or any other homeopathic program), copy it and then paste it into the Themes/Keynote box.

Regardless of which homeopathic case analysis strategies you use in your practice, you will find this feature beneficial. Its purpose is to give you a place where you can keep track of repeating words and concepts in a case. Or simply to write notes to yourself - including a checklist of symptoms to ask about at each appointment.

Name	Elizabeth S
Date	Feb 21, 07
Type of Appointment	F/U bet
End	Top
In a message date	

## Jump to the end of a note.

This is useful if you are toggling between COMPASS and another program. When you go to another program Compass refreshes the field by going back to the top.



# :Case Notes Help—Vitals/Stored Docs:



**Vitals:** These details (height, weight, temperature, pulse, blood pressure and respiration) are viewable at the **Case Details** tab (the only place).

Go to **Settings** (from Client Data or Case Details) to select feet or meters, pounds or kilos, Fahrenheit or Celsius.

The screenshot shows the COMPASS interface with the 'Settings' dialog box open. The 'Settings' dialog has tabs for 'Measurements: Weight: lbs', 'Height: ft-in', and 'Temp: F'. The 'Height' tab is selected, showing '5-6 ft-in' and '145 lbs'. The 'Temp' tab is also visible, showing 'F'. The 'CASE DETAILS' tab is selected in the background. The 'Vitals History' table is also visible, showing a list of vitals for Miranda Castro.

Client Data	Outcomes Data	Remedy Audits
Name: Miranda Castro		
Date of Consult	Height	Weight
View Sep 17, 2003	5'8" ft-in	180 lbs
View Aug 24, 2005	5-6 ft-in	150 lbs
View Jan 27, 2006	5-6 ft-in	150 lbs
View Jul 6, 2006	5-5 ft-in	145 lbs

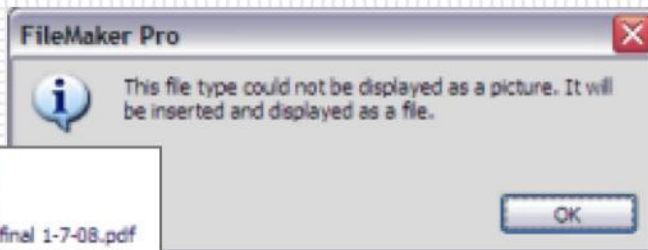
**Vitals Report:** Keep track of some or all Vitals and view a history that includes all appointments and any vitals recorded.

**Stored Docs:** A paperless office keeps all documents in one place, linked to the correct client. You can store an unlimited number of documents for each client in COMPASS including: pdfs of labs that were emailed to you or letters or forms that you scanned in manually.

pdfs with multiple pages: the whole document is stored. These look different on Macs and PCs.

On WINDOWS computers the pdf graphic shows - on MACs the first page of the document shows.

Click the Export button to open a pdf. You'll be asked to Save it. Choose a place like your desktop where you can easily locate it and trash it after viewing it.



The screenshot shows the FileMaker Pro 'Save' dialog box. The 'File name' field contains 'CompassFile.pdf'. The 'Save as type' dropdown is set to 'All Files (\*.\*)'. The 'After saving' section has 'Automatically open file' checked and 'Create email with file as attachment' unchecked. The 'Save' button is highlighted.

The screenshot shows the 'Store scanned documents, faxes and graphics files (bmp, jpeg, gif & tif files etc.)' dialog box. It has a table with columns 'Date', 'Title', and 'ID'. The table contains three rows: 'Dec 20, 2008', 'Consent form', '8033'; 'Dec 20, 2008', 'Insurance', '8032'; and 'Dec 20, 2008', 'Final', '8031'. The 'Insert Doc' button is circled in blue. The 'Export/Open' and 'Enlarge' buttons are also visible.

Date	Title	ID
Dec 20, 2008	Consent form	8033
Dec 20, 2008	Insurance	8032
Dec 20, 2008	Final	8031

Click the enlarge button to view the documents in a larger window - at a screen that shows only the documents i.e. no case notes.

Give each document a good title - one that describes it clearly.

Don't forget to shred any scanned confidential papers rather than simply place them in the trash.



# :Case Notes Help—Summary Notes:



Patient summaries should be brief and complete. A good summary always proves incredibly helpful. You won't have to read the whole case note each and every time. You'll be jogged into remembering this client from the inside out. You'll have a sense of where you are going if the remedy you gave didn't work.

## 'SOAP' Notes

The SOAP format is used by many health care practitioners - this one is adapted to fit the homeopathic perspective.

### **S.O.A.P. FORMAT - tried, tested & accepted summary format**

#### **SUBJECTIVE**

The case as presented by the client, or brief summary thereof. The case notes.

#### **OBJECTIVE**

Observations/description: physical appearance, speech, gestures, expressions etc.  
Your own impressions and feelings.  
Any physical examination findings/labs etc.

#### **ASSESSMENT**

Homeopathic prognosis  
VF: Strength of the Vital Force out of 10  
Mental 0-2, Emotional 0-2, Physical 0-2, Social 0-2, Energy 0-2  
COG (Center of Gravity): Mental/Emotional and/or Physical (M/E/P)  
Main symptoms/rubrics important to the case  
Themes, Miasms, and/or Kingdoms to consider  
Comparative materia media  
Remedies for future consideration (and why)

#### **PLAN**

Remedy/Potency/Dosage  
Recommendations: dietary, supplements, exercise, general, lab or other tests, etc.  
Referrals: to other therapies/therapists and whom.

#### **F/U: FOLLOW UP SCHEDULE**

If an appointment is booked and when, when and how a client is getting in touch - or if they are contacting you only as needed. This information can also be added to the Follow up Tracker at Client Data.



# :Case Notes Help—Summary:



Create a **New Case Note** at the Treatment Summary or the Case Notes screens.

**Navigation:** You can go to anything related to a case from the Case Notes Screens:

- **Case Details**
- **Remedy Details**
- **Research**
- **Forms, Docs, Vitals etc.**
- **Repertorization Graph** and course **Client Data**.

**Viewing:** You can view a case at a number of different screens:

- **Case Notes** (decent size fields - not too much clutter)
- **Case Details** (everything but the kitchen sink!)
- **Full screen** is best if you are typing in the case during the interview.
- **2 visits or 4 visits** at a time is helpful when you have seen your client many times and want to get a quick snapshot of the each visit.

These are the main features of the Case Notes portion of COMPASS:

**Case Notes:** keep notes from each appointment.

You can either type them in directly or paste them from any other program.

**Keynote/Themes** field can be used to jot important aspects of each case.

Whatever technique you have been trained in, this field is useful in your patient management and help you with your case analysis.

**Analysis** field - you can use this for notes (yours or your supervisor) etc.

**Stored Docs.** This field is separate so that you can quickly and easily see all summaries. These are vital for follow up appointments and for case management.

**Vitals.** This field is separate so that you can quickly and easily see all summaries. These are vital for follow up appointments and for case management.

**Repertory Graphs** - each visit will allow you to paste in a graph or list of rubrics you used in your remedy determination. This feature will work with any of the Homeopathic Repertory programs.

**Photographs** - you can paste up to 3 photographs per patient visit. This feature will allow you to follow any physical condition and see the progress. Remember to take the photo in a low resolution .jpg format, which is smaller in size without losing quality of the picture.

**Summary Notes.** This field is separate so that you can quickly and easily see all summaries. These are vital for follow up appointments and for case management.

**Helpful Reminders:** There are 3 documents to help you in your case taking and case analysis. Although they were written with the student or beginner homeopath in mind, they are also good reminders for everyone.

1. **Complete (Homeopathic) Symptom** – the 7 attributes of a symptom reminder
2. **Symptom Checklist** hints - most of the questions that need to be covered in a case taking session, mental, emotional, physical and generals.
3. **SOAP Notes** - guidelines for writing up a homeopathic case analysis & summary.

## Printing Options

The Case Notes pages can be printed in a number of different ways. Printing the whole case out or just the short summary. You can print out a single visit or all visits - on paper or as a pdf. Before you print there are reminders of what information will be printed in each case, and there is a preview enables you to look through all notes before you press print.



# :Case Notes Help—Symptoms Checklists:



## Complete Sx

### A COMPLETE SYMPTOM

- 1. ETIOLOGY**  
emotional/physical, etc.
- 2. ONSET and DURATION**
- 3. QUALITY**
- 4. QUANTITY**
- 5. LOCATION and RADIATION**
- 6. MODALITIES**  
heat/cold, weather changes,  
activity/rest, position,  
pressure, bathing etc.
- 7. CONCOMITANTS**

## Sx Checklist

### SYMPTOM CHECKLIST

**MIND**  
**DREAMS**

**GENERALITIES:**  
Weather/temp.  
Energy/time of day  
Sleep/position  
Appetite/thirst  
Sweat

**VERTIGO**  
**HEAD**  
**EYES/vision**  
**EARS/hearing**  
**NOSE/smell**  
**MOUTH/taste**  
**TEETH**  
**FACE**

**THROAT: int/ext**  
**LARYNX: speech/voice**

**STOMACH**  
**ABDOMEN**  
**RECTUM**  
**STOOL**

**BLADDER**  
**KIDNEYS**  
**URETHRA**  
**URINE**  
**PROSTATE**

**MALE/FEMALE**

**CHEST/palpitations**  
**RESPIRATION**  
**COUGH/expectorations**

**BACK**  
**EXTREMITIES**  
**JOINTS**

**SKIN**  
**HAIR**  
**NAILS**

### **A Complete Case and Plenty of Complete Symptoms!** **This must be homeopathic heaven!!!**

My grampa used to say - take care of the pennies (cents) and the pounds (dollars) will take care of themselves.

Pay attention to the careful gathering of complete homeopathic symptoms as well as a complete homeopathic case, and the analysis and remedy selection will take care of itself.

Make sure that in the process of gathering you perceive and/or elicit as many **characteristic symptoms** as possible and your job will suddenly become much, much easier.

Read everything you can get your hands on that relates to Characteristic Symptoms.



# :Case-taking Checklist - expanded:

<p><i>Edit this list or insert your own</i></p> <p><b>MENTAL/EMOTIONAL SX</b></p> <p>Actively listen and observe.</p> <p>Verify - Clarify - Enlarge</p> <p>Ask for examples Note off-handed comments Be <b>curious</b> (ask why &amp; how often) Use <b>open-ended questions</b> Tell me more? How was that for you? What was the feeling? What was the sensation? And ... What do you mean by that? Can you say a little more (about that)? Is there anything else?</p> <p>Tell me about yourself. Please describe yourself How are your moods? How would a good friend describe you? What are your strengths/weaknesses? What is important to you in life? i.e. What matters to you? What stresses you and how do you react under (those) stress/es?</p> <p>Tell me about your childhood. What was your nature as a child? Tell me about your relationships, work, housing, your life situation.</p> <p>Are you scared of anything? What do you worry about? Are you tidy/ordered/neat or messy? On a scale of 1-10 Do you 'recharge' alone or with people? How are social events/parties for you? What types of things irritate or bother you? What makes you angry? How do you express your anger? How do you deal with conflict? Have you experienced jealousy? Have you had any significant losses? Do you cry? Easily? At what things? Can you be easily hurt? What are you sensitive to - in life - out in the world? ... music, noise, sad stories, smells, pain ++</p> <p>How is your mental energy? How's your memory: short/long term? How is your ability to concentrate? What about decision-making? Have you had any learning difficulties? Mental confusion (usually observed).</p>	<p><i>Edit this list or insert your own</i></p> <p><b>GENERAL SX</b></p> <p><b>Energy:</b> in general? best/worst times?</p> <p><b>Sleep and Dreams</b> How is your sleep in general? Fall asleep easily? Sleep through the night? What wakes you? Do you get back easily? Do you snore, talk, drool, grind teeth, perspire, or walk in your sleep? What position is most comfortable for you? Do you have any recurring dreams or recurring themes in your dreams? What is the feeling of the dream? How do you wake? Refreshed?</p> <p><b>Weather/Temperature Environment</b> Tolerance to temperature, humidity, weather changes, wind, drafts, closed rooms, fresh air etc. What are your best/worst seasons? Sensitive to cold or warm temperatures? Can you tolerate saunas? Reaction to environment: ocean, mountains, desert. Phases of the moon.</p> <p><b>Perspiration</b> Odor. Quality/quantity. Location</p> <p><b>Appetite/Thirst</b> How is your appetite in general? Any strong food cravings or aversions? Allergies? If vegetarian, why? Any foods that disagree or allergies? Thirst: for what/how much? Sip or gulp? Hot/cold? Ice? (Chew it?)</p> <p><b>Miscellaneous</b> Tight clothes around waist or neck? Motion (exercise) (amel or agg?) Pressure (including massage) Periodicities (general) Bathing/water Locality: general rather than particular complaints/symptoms</p>	<p><i>Edit this list or insert your own</i></p> <p><b>REVIEW OF SYSTEMS</b></p> <p><b>Head:</b> Pain. Eruptions. Hair. Dizziness.</p> <p><b>Eyes: Vision.</b> Infections. Itching. Pain. Discharges. Photophobia, lachrymation.</p> <p><b>Ears: Hearing.</b> Noises. Wax. Eruptions. Infections. Pain. Discharges.</p> <p><b>Nose:</b> Sense of smell. Nosebleeds. Pain. Allergies. Discharges: mucus; sinuses ++</p> <p><b>Mouth:</b> Tastes, Odor. Infections. Drooling.</p> <p><b>Gums:</b> Bleeding, Pain. Canker sores.</p> <p><b>Teeth:</b> Dentition. Cavities. Pain.</p> <p><b>Throat:</b> Infections. Glands. Swallowing. Constriction. Voice.</p> <p><b>Stomach:</b> Nausea/vomiting. Knots/anxiety.</p> <p><b>Abdomen:</b> Sensitivity. Inner organs. Pain.</p> <p><b>Digestion:</b> Gas. Bloating. Pain.</p> <p><b>Bowels:</b> Constipation. Diarrhea. Pain.</p> <p><b>Stool:</b> color/size; blood/mucus.</p> <p><b>Hemorrhoids:</b> internal/external.</p> <p><b>Menses:</b> Regularity. Flow. Pain. Clots. PMS.</p> <p><b>Chest.</b> Palps. Tightness. Lumps. Pain.</p> <p><b>Cough/Respiration/Expect.</b></p> <p><b>Genital/Urinary:</b> UTIs, STDs. Discharges. Pain. Warts. Sexual energy in general. F: Pregnancies/abortions/births. M: Prostate</p> <p><b>Musculoskeletal/Neuro:</b> Pain, stiffness, swelling, numbness, tingling: neck, back, joints of arms/legs. Cramps. Varicosities, Chilblains. Restlessness. Tremors.</p> <p><b>Skin:</b> Dry/oily. Cracks. Hairy. Nails Eruptions: itching, flaking etc. Wound healing. Keloids. Bruising. Warts. Moles.</p> <p><b>Fever:</b> Heat. Chills. Perspiration.</p> <p><b>Sleep.</b> Position. Covers. Sweat. Teeth</p>
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# :Checkbook Help:



## A Small Business Dream Come True!

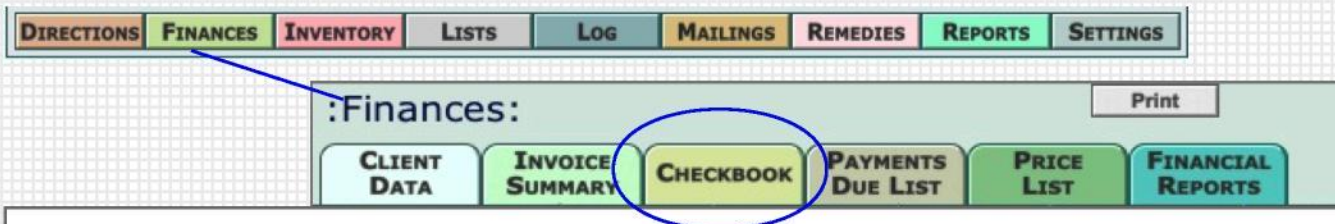
This is the easiest 'checkbook' you'll ever balance. Enter all banking transactions - including payments & deposits - and reconcile them when your statements arrive.

If you have a fairly small business operation then you'll find it convenient to manage all of your financial accounting including your income and expenditure out of Compass.

The reports you can generate at the end of the year will make your tax returns a breeze. To view these click on the Finances button at the bottom of the Client Data screen and then the Reports button. At that screen you'll see a number of 'Expense' Reports and other reports. See also Financial Reports Help.

If you have more than one bank account to run your businesses you'll need a program like Money, Quicken or Quick Books etc.

You cannot 'synch' COMPASS directly with other financial programs, but you can export reports to excel files which you can then import into any other financial program.

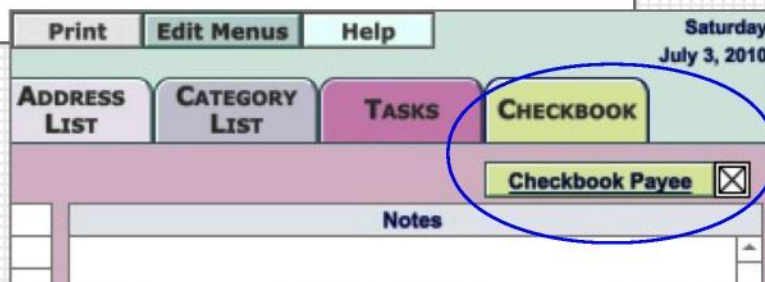


You can get to your Checkbook from Client Data, Invoices and the Address Book. From Client Data click on **Finances** (bottom buttons bar on the Client Data screen) and then select the **Checkbook** tab. From **Invoices** and **Address Book** click on the Checkbook tab.

**First time users:** add an opening balance to start with. Although you don't have to do this your balances will be more accurate.

**Before Entering Any Transactions** set up your 'payees' - people you pay (as opposed to people who pay you)

Go to the Address Book to add a 'Payee' to your Checkbook. Find the companies or individuals to whom you give money (or add them) and check the Payee Box in each one. Those contacts will then automatically appear in the Payee ID list in your checkbook.





# :Checkbook Help—Features:



: Checkbook : Find Print Help Saturday July 3, 2010

**CLIENT DATA** **FINANCIAL REPORTS** **CHECKBOOK** **ADDRESS BOOK**

Go to the Address Book to add a 'Payee' to your Checkbook. Find the company or individual (or add them) and check the Payee Box. That company or individual will automatically appear in the Payee ID list below.

**NEW Entry** Clear All Entries in Account

Date	Edit Menu	Type	Number	ID	Payee Name	Category	Edit Menu	Expense Amt	Deposit Amt	Balance	Dup Tx	Rec
Apr 28, 08	<input type="checkbox"/>	Check	1037	6574	VHPS Publishing Services	Books		492.04			<input type="checkbox"/>	<input type="checkbox"/>
Apr 29, 08	<input type="checkbox"/>	Check	1036	6054	Cacapon Group	Website		50.00			<input type="checkbox"/>	<input type="checkbox"/>
Apr 29, 08	<input type="checkbox"/>	Check	1035	6674	Verizon	Communications		109.88			<input type="checkbox"/>	<input type="checkbox"/>

Click on **New Entry** to add a transaction - a debit or credit - to your Bank Account. You'll be taken to the Account Data Entry entry screen to enter details.

Click the Dup button to duplicate recurring transactions. Today's date will auto-enter.

:Checkbook—Data Entry: Saturday July 3, 2010

< BACK **ADDRESS BOOK**

Date	Type	Number	Payee ID and Name	Category	Expense Amt	Deposit Amt	
Jul 3, 10	Check		<input type="text"/>				<span>DONE</span> <span>CANCEL</span>

Date	Type	Number	Payee ID and Name	Category	Expense Amt	Deposit Amt	Balance	Tax. Rec.
Apr 28, 08	Check	1037	6574 VHPS Publishing Services	Books	492.04		-492.04	<input type="checkbox"/>
Apr 29, 08	Check	1036	6054 Cacapon Group	Website	50.00		-542.04	<input type="checkbox"/>
Apr 29, 08	Check	1035	6674 Verizon	Communications	109.88		-651.92	<input type="checkbox"/>

Enter the following for each transaction using the tab button to go from field to field.

**Date:** today's date is automatically selected

**Type:** use the drop down menu to select the type (check, cash, credit card etc.) \*

**Check/Cheque Number:** enter the 1st check/cheque number manually - the "+" button selects the next number automatically. You can change them manually as needed.

**Payee ID:** select the ID (from the list) - type the first letter or two of the company or person to go to that person and select it. The list is generated by the Address Book.

**Payee:** the name enters automatically if you entered a Payee ID, or type in the name.

**Category:** select the category. Type the first 1-2 letters & click enter on your keyboard. \*

**Amount:** enter the amount being careful which column you enter it into.

Click **Done** to finish.

\* Click the Edit Menu button to customize the Type or Category lists.

Edit Menu

After you click the **Done** button you will be returned to the original checkbook screen and the new transaction will appear at the bottom of the list.

Each field is editable at this screen.

Check the Tax box for business expenses and the Rec. box when reconciling against your bank statement.

## Use this button with Great Care

Clear All Entries in Account

All deletions are final - deleted data cannot be recovered.

Use it ONLY if you want to delete all entries in your bank account and start from scratch.



# :Client Data Help—Advanced:



Think of Client Data as your **home page**, the **center** or **hub** of your paperless office. It contains contact and summary information for all your clients and is **the most important layout in COMPASS**. There's a lot going on at this screen. On purpose. You will quickly appreciate having so much important information in one place. It's like a desktop that files itself. You can jump to most other layouts from this screen using the 'tabs'

Take some time to become familiar with this layout - **to start you can enter yourself**

## Create a New Client

Click the 'New Client' button. Compass will check that the name isn't in the database to avoid duplicates.

## Navigation Tabs & Buttons

take you to other screens where new tabs relating to that section are available. You will find the Client Data at most screens. If you get lost you can always 'go home'.

## Delete a Client

removes all data related to that client including invoices, case notes, remedies, letters etc. **Deleted data can never be retrieved.**

## :Client Data:

The screenshot shows the COMPASS Client Data interface. At the top, there are tabs for CLIENT DATA, TREATMENT SUMMARY, CASE NOTES, REMEDY DETAILS, LETTERS SUMMARY, PRINT ENVELOPE, INVOICE SUMMARY, and ADDRESS BOOK. Below these are buttons for NEW Client, Client List, All, DELETE Client, and QUIT COMPASS. The main area contains a form for client information, including fields for Client ID, First/Last, Primary Parent, DOB/Age, Address 1, Address 2, City, County/State, Postcode/Zip, Country, Home Phone, Work Phone, Cell/Mobile, Fax, Website, Job/School, Primary Doctor, Referred by, Referral Source, and Family Note. There are also sections for CALENDAR, TRACKER, To Do, PHOTOS, and CONTACT INFO. On the right, there is a NOTEPAD section and a SETTINGS section. At the bottom, there are buttons for DIRECTIONS, FINANCES, INVENTORY, LISTS, LOG, MAILINGS, REMEDIES, REPORTS, and SETTINGS. A footer section contains an APHORISM OF THE DAY and a refresh button.

Select the **Basic View** if the Advanced is too busy. You switch back any time.

**Contact Info:** view Name, Address, Phone #s & Email in one field (it expands when you click in it). Copy all or part of this field any time.

**Daily Inspiration!** Click the refresh button to view a different aphorism of the day. Click the Organon button (to the left of the aphorism) to view six different editions of the Organon side by side.



# :Client Data Help—Basic:



Think of Client Data as your **home page**, the **center** or **hub** of your paperless office.

- It contains contact and summary information for all your clients and is **the most important layout in COMPASS**.

- You can jump to most other layouts from this page using the 'tabs'

Take some time to become familiar with this layout - **enter yourself!**

- You can come back to this layout wherever you are in COMPASS.

The **Basic View** shows the basic contact information about a client and from here you can navigate your way about a client's case notes, remedy details and invoices. It will not affect the layouts of the other pages.

If you want to be able to access the Calendar and all the other fine, fun and useful features in Compass then take a deep breath and Switch to Advanced!

## Navigation Tabs

These tabs take you to another screen, where a new selection of tabs relating to that section are available.

Client Data is the one tab common to all screens - you can always come back here!

## Create a New Client

Click the 'New Client' button to enter a name. Compass will check that the name isn't in the database already to avoid creating duplicates.

## Delete a Client

Deleted data cannot be retrieved.

**Delete with GREAT caution.**

Deleting a client deletes all related data including invoices, case notes, letters and remedies.

## Client List

View some or all of your clients by phone numbers, emails or addresses.

## NOTEPAD

You'll find this notepad at each and every screen - use it as you would a pad on your real desk - and jot notes or thoughts that come into your head at any time.

## CONTACT INFO

Click here to see Name, Address, Phone #s & Email all in one field (it expands when you click in it).

Click the Copy button once to copy all contact details to your clipboard.

Switch to **Advanced View** any time you like by checking the box and clicking Switch!

COMPASS

Client Data: Find Print Help

CLIENT DATA TREATMENT SUMMARY REMEDY DETAILS INVOICE SUMMARY All Clients List

NEW Client DELETE Client QUIT Compass

ID	1
First/Last	Elizabeth First
Company	
DOB/Age	February 8 1558 452 Sex F
Address 1	Windsor Castle
Address 2	wing
City	Windsor
County/State	Berkshire
Postcode/Zip	SL4 1NJ
Country	UK
Home Phone	
Work Phone	020 7766 7304
Cell	
Fax	020 7930 9625
Email	
Client Website	www.royal.gov.uk
Job/School	
Parents	Henry & Anne
Referred by	Abbie Cornish
Primary Doctor	Dr Spock
Family Info	One sister
Contact Info	Elizabeth First Windsor Castle

Miscellaneous Notes

elizabethfirst@royal.gov.uk  
faker  
Spends half the year at Edinburgh Castle  
Note to self:  
Be sure to observe palace protocol at all times

User Level ☐ Basic ☒ Advanced Switch ORGANON

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# :Client Data Help—Family Data:



**:Client Data:** Show All Find

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS LETT SUMM

Client ID: 2122 NEW Client

First/Last: Daniel Castro

Primary Parent

Company

DOB/Age: December 23 2000 Sex: M

Address 1: 1234 nw 1st avenue

Address 2

City: toronto

County/State: FL

Postcode/Zip: 12345

Country: Australia No Mass Mail

Home Phone: 954 532 3636

Work Phone: 954 564 1106

Cell/Mobile: 954 547 4633

Fax

Send Email: mirandacastro@aol.com Copy

Website

Job/School

Primary Doctor

Referred by

Family Note

Select a Primary Parent

Relationship to Daniel First Last Add a Relation

View Mother Mirandina Castrolini

View Aunt Yolanda Castro

View SO/Partner Best Friend

Take some time to familiarize yourself with the way Relationships work, the way people can be added and linked to a client.

You can only add relationships at the **Advanced** screen.

Daniel Castro (at left) does not yet have a primary parent yet even though he has several 'relatives'.

To add a relative click the blue **Add a Relation** button

At the Add a Relationship screen select a person from:

1. Clients already in COMPASS: all clients with the same last name will be automatically listed. **Select** one or click list.
2. Non-clients you have added to COMPASS (click for list)
3. Add a **New Relation** (click the blue button) if the person you are looking for isn't in either list.

## :Add a Relationship:

### 1. Find a Person from All Clients in COMPASS

Select a name in the Client List below and click Select next to the person you want to relate to **Daniel Castro**

Client List Castro

Select	First Name	Last Name	ID
Select	Randini	Castro	88
Select	Randini	Castro	88
Select		Castro	88
Select	Daniel	Castro	88
Select	Parent	Castro	88
Select	child	Castro	88
Select	child2	Castro	88
Select	Yolanda	Castro	88

To add a relationship to **Daniel Castro**, a relative or important person i.e a father/husband/nanny etc., start by looking in the client list above.

### 2. Find a Person from the Non Clients in COMPASS

Select a name in the Non-Client List below and click Select next to the person you want to relate to **Daniel Castro**

Non-Client List Castro

Select	First Name	Last Name	ID
Select	Yolanda	Castro	88
Select	child	Castro	91
Select	child2	Castro	94

If you have used the 'New Relation' button (at right) to add relationships then those individuals (who are not clients) will appear in the non client

### 3. Add a Relation

If you cannot find the person in either list at left then click New Relation below.

You will then be able to add a person as a Non Client.

**NEW Relation**

Click Next > to learn how to Add a Relation and Select a Primary Parent

Once you have clicked **Select** next to a person in 1. or 2. (above) you will automatically return to Client Data where you can select the proper relationship from the pop down list.

For clients with lots of relationships click the **Expand** tab to view them all more easily (the Misc Notes box will be hidden temporarily).

Select a Primary Parent

Normal Expand

Relationship to Daniel First Last Add a Relation

View Mother Mirandina Castrolini

View Aunt Yolanda Castro

View SO/Partner Best Friend

View Grandmother Elizabeth First

View Son child Castro

View Aunt another Relative

Daughter

Father

Grandfather

Grandmother

Half brother

Half sister

Husband

Mother

DIR INVENTORY LISTS LOG

User advanced Switch Created Dec 3, 2



## :Client Data Help—Family Data 2:



### :Add a New 'relation':

**CLIENT DATA**

**\*\* First/Last** **First** **Last** **\*\* SELECT**

**\*\* Type**

Address 1  
Address 2  
City  
Country  
Home Phone  
Work Phone  
Cell  
Email  
Notes

Enter the First & Last Name, and the Relationship Type and click **Select** to add this person as a 'relative' of your client. You can add other contact information: address/phone numbers/email, and a note) if you like.

Select a Primary Parent				Normal	Expand
Relationship to Daniel		First	Last	Add a Relation	
<b>View</b>	Mother	Mirandina	Castrolini		
<b>View</b>	Aunt	Yolanda	Castro		
<b>View</b>	SO/Partner	Best	Friend		
<b>View</b>	Grandmother	Elizabeth	First		

To view or edit the details for a 'relation' click **View**.

A visible scroll bar lets you know that there are additional relatives ... click the Expand tab to view up to 10 relatives at a time and/or use the scroll bar to view more.

<b>View</b>	<b>First/Last</b>	<b>Elizabeth</b>	<b>First</b>
	Address 1	Windsor Castle	
	Address 2	East Wing	
	City	Windsor	
	County/State	Berkshire	
	Postcode/Zip	SL4 1NJ	
	Country	UK	
	Home Phone		
	Work Phone	020 7766 7304	
	Cell		
	Email		
	Notes	Ladies in Waiting rather fierce - bring gifts	

All Elizabeth First's Relationships				
Relationship	to	First Name	Last Name	Age
Grandmother	to	Daniel	Castro	9
Mother	to	Richard	Third	557

You can View and/or Edit the contact details for a person here and also view all the people (in COMPASS!) they are related to and the type of relationship.

To add a Primary Parent click the **Select a Primary Parent** button to select the parent to whom letters/invoices etc. are addressed.

You will want to select a parent for clients who are children or clients of any age with a guardian who is responsible for them.

Select a Primary Parent				Normal	Expand
Relationship to Daniel		First	Last	Add a Relation	
<b>View</b>	Mother	Mirandina	Castrolini		
<b>View</b>	Aunt	Yolanda	Castro		
<b>View</b>	SO/Partner	Best	Friend		
<b>View</b>	Grandmother	Elizabeth	First		

Click **Select** (at left) next to the person who is the Primary Parent or Guardian of the client, the one to whom all invoices, letters and emails are be to addressed.

The full name of the 'parent' will appear in the Primary Parent field at the Client Data screen and elsewhere.

### :Select a Primary Parent:

**CLIENT DATA**

Client/Parent IDs **2122** **2975**

First/Last **Daniel** **Castro**

Primary Parent

Relationships	First	Last	
<b>Select</b>	Mother	Mirandina	Castrolini
<b>Select</b>	Aunt	Yolanda	Castro
<b>Select</b>	SO/Partner	Best	Friend
<b>Select</b>	Grandmother	Elizabeth	First
<b>Select</b>	Son	child	Castro
<b>Select</b>		Another	Relative

If the 'child' is an adult who pays their own bills then click **Remove** and the Primary Parent part of the relationship will be removed. The relationship will remain intact!



# :Client Data Help—Features:



## Client Category

There are 7 categories available for your up to 7 different practices.

Go to the **Settings** to set up the categories. Think carefully before you do so. It is easy to change them but if you do the previous category will no longer be available.

Organize your clients according to different practice locations and client type. Clients are people or companies/organizations who pay you for services and/or goods etc.

Click on the **Yellow button** to view a list of all clients in that category.

### Client Category

<input checked="" type="checkbox"/>	General Clients
<input type="checkbox"/>	Boca Raton
<input type="checkbox"/>	Gainesville/Deland
<input type="checkbox"/>	Phone
<input type="checkbox"/>	Students
<input type="checkbox"/>	Inquiry
<input type="checkbox"/>	Tampa

## Audit Data (Category)

Select a category after every follow up appointment. Auditing the results of your work is vital for the health and well being of your practice. This is an invaluable practice management tool.

If the client is not a 'patient' don't check any box incl. non-current.

Re-evaluate the category selected after each appointment.

Check non-current if a client has moved, is seeing another practitioner or is deceased.

### Audit Data

<input checked="" type="radio"/>	New Client
<input type="radio"/>	Simillimum
<input type="radio"/>	Similar/s
<input type="radio"/>	Doing Well
<input type="radio"/>	Variable
<input type="radio"/>	No Response
<input type="radio"/>	No Feedback
<input type="checkbox"/>	Non Current

## Forms on File

See at a glance which forms you have on file for each client and whether they are in a 'real' (paper) file or on your hard drive.

Each one of these headers is customizable - change them to meet the needs of your office. There's a field at the bottom to add a note.

Forms On File	
Hard Copy	Computer
<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
Forms Note	

## CALENDAR

New Appt

Next Appt	Wednesday, December 10, 2008 at 1:00 PM.
Last Appt	Sun, Nov 2, 2008

## Calendar

**An upcoming appointment** is listed if one is scheduled. This is accessed from the Calendar.

**The date of the last appt** shows at the bottom. This is the date of the actual appointment and is taken from Treatment Summary i.e. it is not accessed from the Calendar.

## TRACKER

New Track

Clear

### Follow up Tracker

Date	Fri, Dec 1, 2006
Check up on (on due date)	
Due Date	Thu, Dec 25, 2008

## Follow Up Tracker

Keep track of clients and make sure they don't fall through any administrative cracks! Search for all clients who haven't returned for a specified length of time: i.e. 30, 60, 90 days etc. Or clients with upcoming appointments as well as those with follow up notes.

## To Dos

New Action

Clear

### To Do List

Date	Fri, Dec 5, 2008
Priority	1 - Urgent
Analyze Case	
Email templates (see case notes).	

## To Do List

Keep on top of client tasks from the small ones - like returning calls & emails to bigger tasks like analyzing or reassessing a case. Use it keep track of clients needing daily attention - for e.g. those with an acute. As with all other drop down menus select the edit option to customize the menu to suit your needs.



# :Client Data Help—Miscellaneous:



You will see some or all of these buttons at the top of most layouts.

## Show all

clients or records in any section: all clients, all invoices, all addresses, all remedies, all tasks etc. You will then need to go to a list view to view them.

Show All

Find

Print

Edit Menus

Help

**Find** (search) in any field at any screen. Enter a few letters or numbers in one or two fields - then click the Enter key or 'Find' in the status bar (to left). Type the first 1, 2 or 3 letters of a first and last name rather than all of either - it's fast and efficient - esp. if you can't remember the exact spelling. If there's more than one client with that name you will be taken to a list.

Double check that the correct **printer** has been selected, the correct paper size and number of copies etc. in each box.

Get **Help** with the screen or section you are working in or viewing.

**Edit Menus** - the ones that are available at the screen or section you are working in.

NEW Client

Client List

DELETE Client

QUIT Compass

The **New Client Wizard** makes sure a duplicate client is not created. You **can** create a second client with the same name - you'll be asked to check before you do so.

## Client Lists

Click here to go to a list format to view some or all of your clients - to find clients using the A-Z search buttons.

Separate lists are available for phone numbers, emails and addresses.

## Delete with GREAT caution.

Deleting a client deletes all related data including invoices, case notes, letters and remedies. You cannot 'undo' it i.e. deleted data can never be retrieved. **Be very careful and very certain.**

Use the **Quit Compass** button to close the program. It's not obligatory but it shuts down in an orderly fashion, saving data and reminding you to back up.

The **NEW** buttons create a new Action Items (To Dos), Follow up note or Appointment

NEW

Clear

Send

Copy

Edit Menus

The **Clear** button deletes all data from the current client's To Do list or Follow up Tracker etc.

Quick Email Button. **Send** an email to a client - rather than going to Letters. This email is saved.

Click to **Copy** the data in the field next to these buttons.

Click on the **Edit Menus** buttons to edit one or more of the pop down lists on the screen you are viewing. These lists are designed to stay with you when you upgrade Compass.

## PHOTOS



Use the client notepad to jot down small pieces of information: changes of address, returned emails etc.

Insert up to 6 **photos** for each client. The first photo appears on the Client Data screen (Advanced View). It is useful to have a photo of a client you work with at times by phone or to track of growing kids!

Account Status

Plan

Payment Plan

Select an account status option from the pop down menu. Click plan to track clients in invoices.

Deceased

Enter the date for deceased clients. They are automatically omitted from most searches.



# :Client Data Help—Navigation Tabs:



	CLIENT DATA	TREATMENT SUMMARY	CASE NOTES	REMEDY DETAILS	LETTERS SUMMARY	PRINT ENVELOPE	INVOICE SUMMARY	ADDRESS BOOK
TOP TABS	<p><b>TREATMENT SUMMARY:</b> Summary lists: all visits; all prescriptions. Create new case notes and new prescriptions. Access the Appointment Timer.</p> <p><b>CASE NOTES:</b> Go to the current client's <b>most recent</b> visit.</p> <p><b>REMEDY DETAILS:</b> Go to this client's <b>most recent</b> remedy given.</p> <p><b>LETTERS SUMMARY:</b> Summary list: letters/emails. Create a new letter or email.</p> <p><b>PRINT ENVELOPE:</b> Print a single envelope quickly and easily for one or more clients.</p> <p><b>INVOICE SUMMARY:</b> Summary list of all invoices for a client. Create a new invoice. View a client's Statement, All Payments Due or the Finances screen (see below).</p> <p><b>ADDRESS BOOK:</b> Keep your personal records separate from your clients. For friends, relatives, colleagues and companies you pay for goods and/or services. Send letters or emails, print envelopes or labels, keep track of birthdays and tasks etc.</p>							
TOP BUTTONS	<p>NEW Client   Client List   All   DELETE Client   QUIT COMPASS</p>							
	<p><b>NEW CLIENT:</b> Create a new client. COMPASS checks for existing client with same name.</p> <p><b>CLIENT LIST:</b> View some clients or a list of <b>ALL</b> clients.</p> <p><b>DELETE CLIENT:</b> Delete with GREAT CAUTION. Deleted data can NEVER be recovered.</p> <p><b>QUIT COMPASS:</b> You'll be reminded to <b>Back Up</b>. Please do not ignore this message.</p>							
BOTTOM BUTTONS	<p>DIRECTIONS   FINANCES   INVENTORY   LISTS   LOG   MAILINGS   REMEDIES   REPORTS   SETTINGS</p>							
	<p><b>DIRECTIONS:</b> Keep directions to a client's home for house calls.</p> <p><b>FINANCES:</b> From Finances go to <b>Checkbook, Reports, Price List</b> or <b>Payments Due List</b></p> <p><b>INVENTORY:</b> Keep track of your remedies in stock.</p> <p><b>LISTS:</b> <b>Referrals, Appointment Summary, Locum Data</b>, a variety of <b>Client Lists</b>.</p> <p><b>MAILINGS:</b> Send a mailing (<b>Letters</b> or <b>Emails</b>) to a group or all of your clients.</p> <p><b>REMEDIES:</b> Your own <b>Materia Medica</b>. Keep notes/photos from observations/cured cases. Insert words of wisdom from favorite teachers, books, seminars and conferences.</p> <p><b>REPORTS:</b> including: <b>Age &amp; Sex</b> report, <b>Outcomes Audit</b> (the heart of Compass), <b>Remedy Audits, Complaints Report &amp; Research, Well Being</b> and <b>VAS Research</b>.</p> <p><b>DAILY LOG:</b> A list of the clients you worked with today - or yesterday - or the last week.</p> <p><b>SETTINGS:</b> Customize everything.</p>							
MISCELLANEOUS	<p>CALENDAR   TRACKER   TO DOS   PHOTOS   ORGANON</p>							
	<p><b>CALENDAR:</b> Appointments are linked to Clients only (not to contacts in Address book).</p> <p><b>TRACKER:</b> Keep track of clients who haven't followed up. Find upcoming appointments.</p> <p><b>TO DOS:</b> Action Items - your 'daily lists' of To Dos - one per client.</p> <p><b>PHOTOS:</b> A client's photo album - 6 photos per client.</p> <p><b>ORGANON:</b> Get a daily dose of inspiration. Or more ... much more - click and see!</p>							



# :Client Data Help—Summary:



## CLIENT DATA

Think of CLIENT DATA as your '**HOME PAGE**' - it holds the most important basic information about a client including:

**Contact details** including **Category**

**Appointment snapshot** - the last appt and the upcoming appt if scheduled

**Audit Data check/entry**: check this after each and every appointment.

**Forms on file**

**To Dos**

**Follow Up Tracker**

**Photo**: a thumbnail of photo number 1 from a client's main photo album

**Account Status**

There's no limit to the number of clients you can have in COMPASS

You'll find the pale blue **Client Data tab on nearly every layout**.

You can click on the Client Data tab in almost any layout to 'go home.'

From the Client Data page you can go **almost anywhere!**

Client Data will always work whether you have clients in the database or none.

The tabs change when you go to different sections as **each section has increased options and therefore more tabs** available to accommodate each sections' various functions.

Some tabs will only work once A New Record has been created. For example:

Create a **New Case Note** in Treatment Summary before viewing a client's Case Note

Create a **New Remedy** in Treatment Summary before viewing a client's Remedy Details

Create a **New Invoice** in Invoice Summary before viewing a client's Invoice/s or Statement

<b>Client Category</b>	<b>Top Tips</b>	<b>Audit Data</b>
<input checked="" type="checkbox"/> General Client	Check a Client Category Box <b>each and every</b> time you enter a new client - even inquiries. Make sure everyone is categorized.	<input checked="" type="radio"/> New Client
<input type="checkbox"/> Boca Raton		<input type="radio"/> Simillimum
<input type="checkbox"/> Gainesville/		<input type="radio"/> Similar/s
<input type="checkbox"/> Phone		<input type="radio"/> Doing Well
<input type="checkbox"/> Students		<input type="radio"/> Variable
<input type="checkbox"/> Inquiry		<input type="radio"/> No Response
<input type="checkbox"/> Tampa		<input type="radio"/> No Feedback
		<input type="checkbox"/> Non Current

Postcode/Zip 33020

No Mass Mail ☐

**No Mass Mail** - check this box to automatically exclude a client from all future mass mailings  
This is useful for non-current clients, the children of parents who are clients already, for families with more than one child, clients who have requested that you not contact them and so on.

<b>ORGANON</b>	<b>APHORISM OF THE DAY</b> Summary by Julian Winter	252. The dose can produce aggravation in the parts already affected. The artificial diseases substitutes for the natural disease. 252: if the dose is too large, the first dose produces an aggravation, especially in chronic diseases	
----------------	--	--	--

A random **aphorism of the day** will appear each time you open COMPASS.  
Click on the refresh button to get a new aphorism.  
Click on the **Organon** button to view 5 different full translations of that aphorism side by side.







# :Directions Help:



This layout allows you to 'file' the directions for any client in one place where they are always easily accessible. This is especially valuable for those who do house calls. The same feature is available in the address book! Save time by looking it up once only!

The following important information is automatically entered from Client Data:

- name and DOB
- address
- all phone numbers.

## Big Print for Easy Trips

You'll notice that the print on this page is much larger than others. And it's bold too! You'll find the directions easy to read in a car or straight from your laptop for those 'road warriors' amongst you!

## On-Line Maps

Copy the web address of your favorite web map or maps into the Go To Website fields and Compass will take you there via Internet Explorer when you click on the headers.

Make sure you are online when you click on the headers.

**Directions to Client** Find Print Help Save March 13, 2006

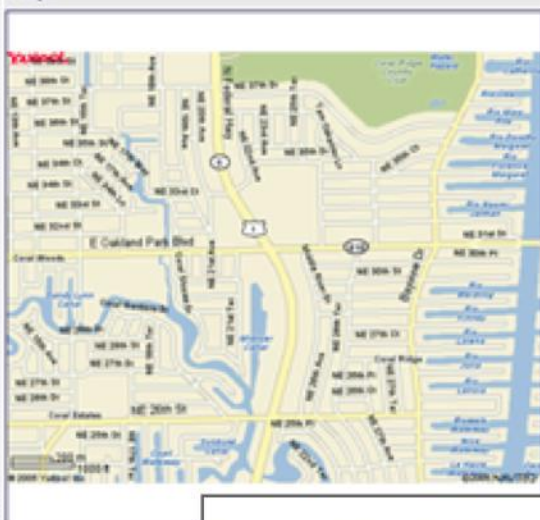
CLIENT DATA	DIRECTIONS
FULL NAME	Miranda Castro
PARENTS	Fidel & Carmen
COMPANY	
DOB/AGE	Jun 7, 1931 73 ID 876
ADDRESS	3501 N Federal Highway, # 201 Fort Lauderdale, FL 33306
PHONE H.	954 532 3636
PHONE W.	954 564 1106
CELL	954 732 8620
GO TO WEBSITE	<a href="http://maps.yahoo.com/dd">http://maps.yahoo.com/dd</a>
GO TO WEBSITE	<a href="http://www.mapquest.com/directions/">http://www.mapquest.com/directions/</a>

For driving directions on the internet copy the web address of your favorite map site or sites into the 'Go To Website' fields/.  
Be sure to be connected to the internet and then click on the Go to Web button!

Distance: 11.70 miles  
Total Estimated Time: 17 minutes

1. Start out going WEST on NW 38TH PL toward NW 7TH AVE. <0.1 miles
2. Turn LEFT onto NW 7TH AVE. 0.1 miles
3. NW 7TH AVE becomes NW 37TH ST. 0.1 miles
4. Turn RIGHT onto NW 5TH AVE. <0.1 miles
5. Turn RIGHT onto W SAMPLE RD/NW 36TH ST. <0.1 miles
6. Turn LEFT onto NW 5TH TER. <0.1 miles
7. Turn LEFT onto W SAMPLE RD/FL-834 E/NW 36TH ST. 0.2 miles
8. Merge onto I-95 S toward MIAMI. 7.8 miles
9. Take the SR-816/OAKLAND PK BLVD exit- EXIT 31. 0.4 miles
10. Merge onto W OAKLAND PARK BLVD E/FL-816 E/NW 31ST ST. 2.7 miles
11. Turn RIGHT onto N FEDERAL HWY/FL-5 S/US-1 S. <0.1 miles
12. End at 3051 N Federal Hwy, Fort Lauderdale, FL 33306-1403 US

Map



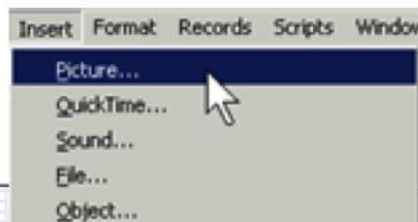
Copy an internet Map and paste it into the map field in COMPASS

- Right click and select Copy Image
- Ctrl + V to paste or right click and select Paste Bitmap or ...

Save the map to your desktop

(Ctrl + S or right click and select Save)

Go to the Insert Menu, select Picture & locate on your desktop & Insert





# :Emails Help—Get Set Up:



## SETTINGS

**You cannot 'receive' emails into COMPASS - you can only send emails.**

Go to Email Settings to get set up. Click on the Settings button - bottom right of the Client Data screen, then click on the Email button. You'll find helpful directions there.

Address Book Business Card Calendar Client Data Email Envelopes Inventory Invoices Labels Letters Pharmacy

**You must enter the following information in order to send emails from COMPASS.**

**Outgoing SMTP Host:** Type your outgoing mail server here. Check the ISP (internet service provider) List to make sure you have typed the address correctly with no spaces etc.

**From Email Address:** Type in your own email address.

**Authentication:** Leave it set to 'None' unless authentication is required. Call Tech Support if needed.

> ISP List

Outgoing SMTP Host	smtp.east.cox.net
From Email Address	email@mirandacastro.com
Authentication Type	None
Username	
Password	

**Send Test Email:** Check your emails are working by sending (yourself) a test email.

Send TEST Email

Enter your 'Outgoing SMTP Host', 'From Email Address' and a signature (name and contact details) above then send a test email (to yourself) by clicking this button.

<b>Email Signature</b>
MIRANDA CASTRO, Homeopathic Consultant Mailing: 4474 NW 1st Ave, Gainesville, FL 32607 Gainesville Office: 1801 NW 11th Road, Gainesville, FL 32605 Boca Office: 8549 Surrey Lane, Boca Raton, FL 33496 Phone: 352-505-8545 Email: mirandacastro@cox.net Website: www.mirandacastro.com

**Email Signature:** It will be inserted automatically into all your emails.

You can type as much information as you like, including a pithy quote and a 'legal disclaimer.' Bear in mind that many people do not scroll to the bottom of emails so you might want to keep it relatively simple and clear.

You cannot format the signature except for adding bold, italic or underlining. All emails (including the signature) are sent as text in Arial.

### Delay Settings

These settings create gaps or delays when sending mass mailings. They will disconnect and reconnect to the mail server (according to the settings below) to bypass spam blockers. Call your Internet Provider Tech Support to get help with this if your spam filter or firewall are blocking outgoing mass emailings and you are not sure how to set the delays.

Stop/Restart after this many addresses	10	Set to a high enough number to bypass spam filters. Enter as HH:MM:SS
Delay between stop and restart	00:00:30	

**Delay Settings:** These are for mass mailings - in order to bypass the spam filters of some ISPs. If you have difficulty with a Mass Mailing then check your firewall isn't blocking outgoing mass emailings and set the delay for 30 seconds (00:00:30) every 10 addresses. If this doesn't work you'll need to call your ISP tech support for help.

**Tip** Keeping track of emails can be a challenge - it's worth setting up a simple system for emails and phone calls in between appointments. Create a new 'case note' for all the emails and calls ... enter today's date (Ctrl or Cmd -) before each entry.

COMPASS cannot 'receive' emails - it can only send emails.

See also Letter Help



# :Emails Help—Send an Email:



From Client Data click the **Send** button next to a client's email or the **Letters Summary** tab and select **New Letter or Email**. Either way you'll get a message asking if you want to create a new letter or email, then checking whether you want to write to an Adult or the client's Parent.

Click to **copy** an email to your clipboard - paste it into any other program.

**CLIENT DATA** **TREATMENT SUMMARY** **CASE NOTES** **REMEDY DETAILS** **LETTERS SUMMARY** **ENV**

Fax: 253-159-3548  
 Email: richardthethird@warlock.com  
 Website: www.richardthethird.com

**Send** **Copy**

**Sent Details** enter here after an email is sent. If there's a problem check here.

**Attachments:** Attach (or detach) a file from your computer to an email.

Use the **Copy** buttons to paste information from that field into an email or any other program.

**:Adult Email:**

Date Sent:   
 Sent Details:

From: mirandacastro@cox.net  
 To:

Subject:  **Enter a Subject**

**Send a TEST Email** to check how it looks. It will be sent to YOUR email address and/or

**Print Email** if you want a copy on file and/or

**Send THIS Email** to your client.

Enter a **Subject** then ...

**Select a Template** by clicking the Select button ... that template will 'load' into the body of your email. If you have typed anything into the email it will be replaced.

Once you have selected a template you can edit it as much as you like.

Paste in the Next Appt for Appointment confirmations.

**Signature**  
 MIRANDA CASTRO, Homeopathic Consultant  
 South Florida Office: 1900 S Olive Avenue, West Palm Beach, FL 33401  
 Gainesville Office: 1801 NW 11th Road, Gainesville, FL 32605  
 Mailing Address: 4474 NW 1st Avenue, Gainesville, FL 32607  
 Phone: 352-505-8545  
 Email: mirandacastro@cox.net

**COMPASS**

**CLIENT DATA** **SINGLE MAILINGS** **EMAILS SETTINGS**

Name: Elizabeth First  
 Parents: Henry & Anne  
 Company:   
 Next Appt: at

**NEW Letter or Email** << < Prev 7 of 7 Next > >> **Note**

<b>View</b>	Jul 15, 10	Gainesville: NPL (Adult)	<input type="text"/>
<b>View</b>	May 22, 10	Blank Letter: Adult	Invoice resent
<b>View</b>	May 4, 10	NPL West Palm Beach (Parent - for child)	<input type="text"/>
<b>View</b>	May 2, 10	NPL West Palm Beach (Parent - for child)	<input type="text"/>
<b>View</b>	Feb 4, 06	Email to Parent #3	<input type="text"/>
<b>View</b>	Jan 20, 06	Appt confirmation WPB (Adult)	<input type="text"/>

Select	Template Title	Add/Edit All Templates
Select	NPL Adult: Gainesville	<a href="#">View/Edit This Template</a>
Select	NPL Adult: West Palm Beach	<a href="#">View/Edit This Template</a>
Select	NPL Parent (for child): Gainesville	<a href="#">View/Edit This Template</a>
Select	NPL Parent (for child): West Palm Beach	<a href="#">View/Edit This Template</a>
Select	Phone: NPL (Adult)	<a href="#">View/Edit This Template</a>
Select	Phone: NPL (Child)	<a href="#">View/Edit This Template</a>
Select	West Palm Beach: Appt confirmation (Adult)	<a href="#">View/Edit This Template</a>
Select	West Palm Beach: Appt confirmation (Parent)	<a href="#">View/Edit This Template</a>
Select	zBlank Email: Parent	<a href="#">View/Edit This Template</a>
Select	zBlank Letter: Adult	<a href="#">View/Edit This Template</a>

There's no limit to the number of templates you can write. Click the Add/Edit All Templates button to see all your templates, to edit them and/or add new ones. Name them carefully to make it easy to find the one you want.

**IMPORTANT NOTES:** All emails are sent as text in Arial. You cannot format emails sent from COMPASS (except for adding bold, italic or underlining). You cannot receive emails in COMPASS.



## :Internet Service Providers:

The ISP is the company you pay for your Internet Service - it is not necessarily your email company but it may be. If your ISP is not listed here ask the company who provides your internet service for the exact address of your outgoing email server.

AOL: smtp.mail.aol.com  
Adelphia: mail.adelphia.net  
Ameritech:  
    mailhost.det.ameritech.net  
AT&T: mailhost.att.net  
AT&T Global: smtp1.attglobal.net  
Bell internet highspeed (Canada):  
    smtp10.bellnet.ca  
Bell south: mail.bellsouth.net  
Bigpond.com (Australia): contact  
    service provider for Settings.  
CableOne: mail.cableone.net  
Cablespeed: mail.cablespeed.com  
Charter Communications:  
    smtp.chartermi.net  
Charter.net: smtp.charter.net  
CharterTN.net: mail.chartertn.net  
CharterMI.net: mail.chartermi.net  
Cincinnati Bell/Fuse Dial-up:  
    smtp.fuse.net  
Coax.net: smtp.west.coax.net  
    (or east/central)  
Comcast: smtp.comcast.net  
Cox: smtp.west.cox.net  
    (or east/central)  
Earthlink: smtp.earthlink.net  
Etisalat (UAE):  
    smtp.emirates.net.ae  
Epix: out.epix.net  
Erols: smtp.erols.com  
Frontiernet.net: smtp.frontiernet.net  
Fuse: smtp.fuse.net  
Google: smtp.google.com  
Iquest.net: mail.iquest.net  
ISP.com: mail.isp.com  
Juno: smtp.juno.com  
Megared (Mexico): contact service  
    provider for Settings.  
Mindspring: smtp.mindspring.com  
MSN: smtp.email.msn.com  
MSN.DSL:  
    secure.smtp.email.msn.com  
NEBI.com: mail.nebi.com  
Netcom: smtp.ix.netcom.com

NetZero: smtp.netzero.net  
OOL (Optimum Online):  
    mail.optonline.net  
Pacific Bell (Pacbell):  
    mail.pacbell.net  
panix.com: mailhost.panix.com  
PeoplePC: smtp.peoplepc.com  
Quixnet.net: smtp.quixnet.net  
RCN: smtp.rcn.com  
Road Runner(NYC): smtp-aserver.nyc.  
    rr.com (for other states,  
    contact Road Runner)  
Rogers Hi-Speed (Canada):  
    smtp.broadband.rogers.com  
SBC: smtp.sbcglobal.net  
SBC Yahoo:  
    smtp.sbcglobal.yahoo.com  
speakeasy: mail.speakeasy.net  
Spectrum DSL: mail.webstable.com  
SprintLink:  
    smtp.a001.sprintmail.com  
Spryn: m6.sprynet.com  
Starpower: smtp.starpower.net  
Sympatico:  
    mailhost.sk.sympatico.ca  
Telus: smtp.telus.net  
UMBC: smtp.gl.umbc.edu  
USA.NET: mail.netaddress.usa.net  
US Internet: smtp.usit.net  
The-Beach.net: mail.the-beach.net  
UUNet: mail.uu.net  
Verio: smtp.veriomail.com  
Verizon: outgoing.verizon.net  
Verizon(alt): smtpout.verizon.net or  
    outgoing.verizon.net  
Wide Open West:  
    smtp.mail.wideopenwest.com  
XO Communications:  
    mail.njd.xo.com or smtp.  
    concentric.net  
Yahoo: smtp.mail.yahoo.com  
Yourlink.ca (Canada): contact service  
    provider for Settings.  
Ziplink: smtp.ziplink.net



# :Envelopes Help:



You'll find Envelope tabs or buttons in all the obvious places ... at Client Data, the Letters Summary screen, Invoice Data Entry, Follow up Tracker, Address Book.



Address Book Business Card Calendar Client Data Email **Envelopes** Inventory Invoices Labels Letters Pharmacy

Go to **Envelopes Settings** to select the size of envelope you use most often.

<b>CLIENT DATA ENVELOPES</b> Click to go to envelope	# 10	International
	C5	International
	DL	International

Click a button at left to set your default envelope (the size you use most often). Your chosen one will be the one your printer will automatically select.

Default Envelope - #10

**ENVELOPE SIZES**  
# 10: 4.125" x 9.5" (109 mm x 241 mm)  
C5: 9" x 6.5" (162 mm x 229 mm)  
DL: 4.313" x 8.625" (110 mm x 220 mm)

There are 3 choices of envelope: # 10, C5 (US) and DL (Europe). Click the size you use most often and COMPASS will automatically selected it as your default. You can change it any time. The International options print the country and an airmail 'label'.

**ENVELOPE: TEXT Field**  
From: Your Name  
55 Your St.  
Happy Haven, FL 33333

**ENVELOPE: LOGO Field** **INSERT**

While you are at the Envelopes settings layout type in your own address into the **return address** field - or insert a logo if you have one (a jpg or png etc.) If you have envelopes with your return address already printed on them make sure both these fields are empty. You'll find more detailed instructions at that screen to help you.

From: Your Name 55 Your St. Happy Haven, FL 33333	<b>AIR MAIL</b>	<b>:DL Envelope—Int'l:</b>	<div>Find Print One Print All Help</div> <div>CLIENT DATA SINGLE MAILINGS INVOICE DATA ENTRY</div> <div><b>COMPASS</b></div> <div>ENVELOPES SETTINGS TRACKER ADDRESS BOOK</div> <div>Name: Elizabeth First</div> <table><tr><td># 10</td><td>International</td></tr><tr><td>C5</td><td>International</td></tr><tr><td>DL</td><td>International</td></tr></table>	# 10	International	C5	International	DL	International
# 10	International								
C5	International								
DL	International								
ELIZABETH FIRST HOUSE OF WINDSOR WINDSOR CASTLE WINDSOR, SL4 1NJ UK									

## Notes:

Once you are at the envelope screen you can select another size temporarily. In order to change your default envelope you have to go to the Settings screen to do so.

If you entered one or both parent names COMPASS will automatically address the envelope to the parent. Remove the parent's names (in Client Data) to have all correspondence (emails, letters and envelopes etc.) addressed to the client.

Check in the status bar that there is only 1 found record **OR** in the second print dialog box select **Current record** from the menu unless you are printing more than one envelope in which case check the correct number of records have been 'found'.



# :Financial Reports Help:



**DIRECTIONS FINANCES INVENTORIES**

Click on the Finances button at the Client Data or Invoice Data Entry screen.

Click on the Financial Reports tab to go to the Reports screen. These reports will make your life easier when it's time to file your tax return, to pay your Sales Tax, or to check how your business is doing on a monthly or as-needed basis.

:Financial

CLIENT DATA

INVOICE SUMMARY

CHECKBOOK

PAYMENTS DUE LIST

PRICE LIST

FINANCIAL REPORTS

:Financial Reports:

Help

CLIENT DATA

FINANCIAL REPORTS

CHECKBOOK

FINANCES

## INCOME REPORTS & SUMMARIES

- ▶ Sales Summary by Category: Month or Year
- ▶ Sales Summary by Category: Dates specified

Totals - by category - of all products/services **invoiced**.

- ▶ Income Summary: Year to Date (YTD)

Totals **paid** for year to date.

- ▶ Income List: Month or Year
- ▶ Income List: Dates specified

List of all products/services **paid**.

- ▶ Sales Taxes: Month or Year

Sales taxes **paid**.

- ▶ Credit Card Income: Month or Year
- ▶ Credit Card Income: Dates specified

Credit card **payments**.

## EXPENSE REPORTS & SUMMARIES - from Checkbook

- ▶ Expenses Summary: Month or Year
- ▶ Expenses Summary: Specific Dates

Totals - by category - of **expenses**/checking transactions.

- ▶ Transactions: Month or Year
- ▶ ALL Transactions To Date

All checking transactions including deposits.

- ▶ All Transactions: Month or Year

A 'ledger' of every transaction: **Income and expenditure**.

- ▶ Custom Search

Define your search criteria.

**Sales Summaries** list services and/or products that you have issued invoices for but not yet been paid for.

**Income Lists** report on invoices that have been paid.

Use the **Credit Card** reports to track these payments, to see what percentage of your income is from cards for example.

The **Expense Summaries** report from the checkbook entries.

There is also a **ledger** that lists all transactions (income & expense) and a **custom search** facility.

Click on the arrow next to any report to be taken to a simple search screen with instructions. Enter the month and/or year - or custom dates and click **Continue**.

Layout: Income List View As: 78 / 9743 Found (Sorted) Preview

:Income List for March 2009:

Inv #	Date	Acct	Name	Company	Payment Amt
13967	Mar 2, 09	2158			250.00 Check
13968	Mar				75.00 Check
13971	Mar				230.00 Check
13972	Mar				75.00 Check
13954	Mar				25.00 Check
13969	Mar				250.00 Check
13974	Mar				100.00 Check
13976	Mar				50.00 Check
13977	Mar				27.50 Credit Card
13966	Mar				75.00 Credit Card
13965	Mar				27.50 Credit Card
13973	Mar				75.00 Credit Card
13970	Mar				102.50 Credit Card
13981	Mar				100.00 Credit Card
13982	Mar				75.00 Credit Card
13983	Mar				100.00 Credit Card
13984	Mar				100.00 Credit Card
13979	Mar				100.00 Credit Card
13980	Mar				100.00 Credit Card
13978	Mar 9, 09	2158			100.00 Credit Card
13986	Mar 12, 09	2089			100.00 Credit Card

Use the **rolodex** in the status bar to see how many 'line items' are in the report. There are 78 in this one.

Click **Preview** to go to Print Preview where you can either print, create a pdf or export to an excel file ... or Exit Preview to return to the report itself.

Layout: Find Month View As: 78 / 9743 Found (Sorted) Preview Script Is Paused Continue

:Find by Month or Year:

Month	Year
March	2009

Use the **scroll bar** (right side) to scroll through long reports quickly and to view the bottom line!



## :Financial Reports Help—More:



At the Print Preview screen you can use the rolodex to scroll through the pages ... here you can see that you are viewing page 3 of 3 pages in total.

You can create a pdf of the report, export the data to an Excel file, or print a hard copy.

Inv #	Date	Acct	Name	Company		
14046	Mar 31, 09	2208				
14052	Mar 31, 09	2217			20.00	Cash
14053	Mar 31, 09	2218			40.00	Cash
<b>Total Income</b>					<b>7,905.20</b>	

Click Exit Preview to return to the previous screen (where you can click the Financial Reports tab to go back to the main Reports screen).

Custom Searches are an Advanced Feature.

Use this to find specific financial information.

You can only enter fairly simple pieces of data here in order to get information. For example: a client's name to view every single transaction for one client, or a product code to view how many copies of a book or how many tubes of a cream you have sold and so on.

This feature is not fully developed at this point in time so don't hesitate to ask us if there's something you are trying to find and cannot work out how - we may well be able to help you.

Please let us know if you are using it and how, what works for you and what doesn't and/or how you would like to use it so we can develop it further.

**:Custom Report Search:** [Help](#)

**CLIENT DATA** **FINANCIAL REPORTS** **Click Continue (at left) to Get Your Report**

**CLIENT DATA**

Client Name	ID
Parents	
Company	
Street	
City	Country
State/Prov	State/Prov
Phone h.	

**INVOICE DATA** **Month** **Year** **Select Dates**

Transaction Date			<input type="checkbox"/>
Code		Inv No	
Description			
Quantity			
Price each			
Taxable Amount			Taxable <input type="checkbox"/>
Invoice Amount			

**PAYMENT DATA** **Month** **Year** **Select Dates**

Payment Date			<input type="checkbox"/>
Payment Type			
Payment Amount			
Credit card: Name			
Credit card: Numbers			
Credit Card Type			Exp

**CHECKBOOK DATA** **Month** **Year** **Select Dates**

Date			<input type="checkbox"/>
Checkbook Payee ID			
Checkbook Payee			
Checkbook Category			
Payment Type			
Check Number			
Debit/Credit Amount			
Taxable Income <input type="checkbox"/>			Reconciled <input type="checkbox"/>
Note			
Checking Item			

**TRANSACTION DATA**

Transaction ID		Charge is an invoice line item
Record Number		Checking is a checkbook item
Transaction Type		Income is an invoice payment



# :Follow-up Tracker Help:



This feature alone will pay for COMPASS in just a few short months by making sure clients don't fall through any inadvertent administrative cracks in your office.

Use this feature to keep track of clients - to make sure you follow up with them and/or they with you. Clients always appreciate our keeping in touch with them and it's fantastically good for the health and well-being of your business.

Click on the Tracker tab to go to the Follow up Tracker screen with multiple searching capabilities.

Click the blue **New Track** button to auto-enter 'today's date', then select the relevant item from the tracker menu and a 'due date' if appropriate.

Click on Edit Menus (top of screen) to add an item to the list

View all your clients birthdays by clicking here.

## :Follow up Tracker—Find Clients:

Click here to find all clients with follow up notes. All searches at this screen will take you to a list view.

### No More No Shows

Find clients with upcoming appointments and send reminders. You'll cut your 'no shows' down to virtually nil overnight.

### No More Falling Thro' Cracks

Find clients who haven't been back in a while and send them an inquiring letter or email. Invite them to let you know how they are doing. You'll be surprised at how many did not return because they are better.

### Keep In Touch with New Clients

Find clients who have been in fairly recently and check in with them to see how they are doing.

Limit a search to a certain practice or group of clients.

Check the list at the next screen and then go to the Mass Mailing to send out emails or letters.



# :Follow-up Tracker Help—Results:



Toggle between this screen and the **Contact Details** list (with phone number and email) or the **Appt Details** list (with last and next appointments). Or view addresses by clicking the **Lists** button and making your selection there.

Click on the pink headers to sort the lists by follow up note, date or name (first or last) etc.

Use the Date of Last Appointment to help decide what to do about following up with a client or family.

**:Follow up Tracker List:** Show All Find Print List Help Thursday July 15, 2010

CLIENT DATA TRACKER FOLLOW UP LIST CONTACT DETAILS APPT DETAILS TO DO LIST MASS MAILING < LISTS

Find All Clients With Follow Up Notes

	NMM	First Name	Last Name	Parents	Date Entered	Follow-up Note	F/U Due Date		Date last appt
View	NEW	<input type="checkbox"/>	Elizabeth First	Henry & Anne	May 22, 2010	Check up on (on due date)	May 28, 2010	Clear	Jan 10, 2006
View	NEW	<input checked="" type="checkbox"/>	Miranda Castro		Dec 1, 2006	Check up on (on due date)	Dec 25, 2008	Clear	Nov 2, 2008
View	NEW	<input type="checkbox"/>	Randini Castro			Check up on (on due date)	Apr 1, 2008	Clear	Jul 6, 2006
View	NEW	<input checked="" type="checkbox"/>	Nick Angelo	Marilyn Angelo	Jan 29, 2006	Appt canceled - will call		Clear	May 20, 2004
View	NEW	<input type="checkbox"/>	Randini Castro	Fidel Castro		As needed		Clear	Jul 16, 2005
View	NEW	<input type="checkbox"/>	Angela Angelo	Jim Hoyt	Jan 29, 2006	Check up on		Clear	Jun 29, 2009

Click **View** to see this client's details at Client Data.

Click **New** to add a Follow up Note - the date inserts and the note menu pops down.

You can clean up your data here. Click on last name to see all members of a family. Check NMM (no mass mail) for one or more kids if you their parent is a client so they do not receive duplicate copies of your letter or email.

Toggle between this screen and the address lists to double check where you have more than one family with the same last name.

Sort by Follow up note and make sure NMM is checked if a client is lost or has transferred to another homeopath.

Click the Clear button to remove Follow up Tracker data from each of the three fields if following up is no longer relevant or necessary.

**:Appt Tracker—Appt Details:** Print List Print Cards (3 up) Print Envelopes Print Labels Help

CLIENT DATA TRACKER FOLLOW UP LIST CONTACT DETAILS APPT DETAILS TO DO LIST MASS MAILING < LISTS

	First Name	Last Name	Parents	Last Appt	Next Appt	
View	Elizabeth First		Henry & Anne	January 10, 2006		Windsor Castle, wingWindsor, Berkshire SL4 1N
View	Miranda Castro			November 2, 2008		1401 S Ocean Blvd, # 405, Pompano Beach, FL
View	Randini Castro			July 6, 2006		4474 NW 1st Avenue, Gainesville, FL 32607
View	Nick Angelo		Marilyn Angelo	May 20, 2004		123 End of the Rainbow, Heaven, HI 12666
View	Randini Castro		Fidel Castro	July 16, 2005		4474 NW 1st Avenue, Gainesville, FL 32607
View	Angela Angelo		Jim Hoyt	June 29, 2009		532 Pear Tree Lane, Fruity, KS 10101
View	Jim Hoyt			July 11, 2005		PO Box 359, Great Cacapon, WV 25422
View	Odessa Hoyt		Mother Betty	December 31, 2005		1234 nw 1st avenue, toronto, FL 12345

At the Contact or Appt Details screens you can print these lists and also print labels, envelopes or cards. The postcards are for veterinarians who do not have to worry about client confidentiality or for communications where confidentiality is not an issue.



# :Forms Help:



## :Case Notes:

Copy Appt Copy All Appts Print Appt Print All Appts Help

Wednesday  
December 26, 2007

CLIENT  
DATA

TREATMENT  
SUMMARY

CASE  
NOTES

CASE  
DETAILS

VIEW 2/4  
APPTS.

REMEDY  
DETAILS

RESEARCH

Forms

Insert Graph

These 'forms' are based on the medical background sheets I send to clients before their first appointment. This part of compass is not fully developed yet and so you may wish to think twice about using it. If you do use it please feel free to let me know how and what improvements you would like to see.

You can access the forms from the Case Notes or Case Details screens.

**Form 1** includes mostly childhood medical information as well as accidents/injuries/surgeries.

:Medical Background Form—1: Find Print Help Wednesday December 26, 2007

CLIENT DATA TREATMENT SUMMARY CASE NOTES CASE DETAILS VIEW 2/4 VISITS FORMS MED - 1 FORMS MED - 2

Name: Leora Stoffe DOB: Jan 28, 1991 Parents: ID: 1891

Pregnancy	Other Illnesses	Medication
Birth	Operations	Supplements
Baby	Accidents	Vaccinations
Childhood Illnesses	X-Rays	Toxic Exposures

**Form 2** includes a family's medical history. There's a place to list previous treatments although you may wish to keep list this in the Case Notes.

:Medical Background Form—2: Find Print Help Wednesday December 26, 2007

CLIENT DATA TREATMENT SUMMARY CASE NOTES CASE DETAILS VIEW 2/4 VISITS FORMS MED - 1 FORMS MED - 2

Name: Leora Stoffe DOB: Jan 28, 1991 Parents: ID: 1891

Mother	Alcoholism	Previous Homeopathic Rx
Maternal Grandmother	Arthritis	
Maternal Grandfather	Asthma	
Father	Cancer	
Paternal Grandmother	Diabetes	
Paternal Grandfather	Eczema	
Siblings	Epilepsy	
Other Relatives	Hayfever	
	Heart	
	Hernia Yrs	
	Hanges	
	Jaundice	
	Mental Illness	
	Skin Problems	
	TB	
	VD	
	Other Diseases	



# :Inventory Help:



FINANCES INVENTORY LISTS

## Inventory

This inventory is designed to keep track of your personal stock cupboard ... of the remedies you have available/in stock. Get to it from Client Data (bottom buttons) or from Remedy Details (tab)

Address Book Business Card Calendar Client Data Email Envelopes **Inventory** Invoices Labels Letters Pharmacy

Go to the Inventory Settings screen first and type in the most frequently occurring potencies in your stock. There are 30 'headers' for you to customize.

Select Potencies

6X	3C	6C	12X	12C	15C	30X	30C	100X	100C	200X	200C	1M	10M	50M
CM	LM1	LM2	LM3	LM4	LM5	LM6	LM7	LM8	LM9	LM10				


Customizable headers for the potencies you keep in stock  
The potencies you type in here will appear automatically in the Inventory layout

450 / 3364  
Found (Sorted)

Click Remedies in Stock to see your whole list (see the Roladex for number totals). Click one of the letters below to quickly find all As (i.e. Aurums or Arsenicums etc.) without having to search and type!

:Inventory:

Show All

CLIENT DATA	REMEDY DETAILS	REMEDY AUDITS	REMEDY LIST	MATERIA MEDICA	INVENTORY	INVENTORY SETTINGS	ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																												
							In Stock A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																												
Full Name		Remedies in Stock	6X	3C	6C	12X	12C	15C	30X	30C	100X	100C	200X	200C	1M	10M	50M	CM	LM1	LM2	LM3	LM4	LM5	LM6	LM7	LM8	LM9	LM10					Total	Notes	Clear all Fields
Abies-n.	Abies nigra	<input checked="" type="checkbox"/>				1		1		1																							3		Clear
Abrot.	Abrotanum	<input checked="" type="checkbox"/>	1												1																		2		Clear
Absin.	Absinthium	<input checked="" type="checkbox"/>				1	1			1																							3		Clear
Acet-ac.	Aceticum acidum	<input checked="" type="checkbox"/>				1	1			2																							4		Clear
Acon.	Aconitum napellus	<input checked="" type="checkbox"/>	1	1		2	1		3					2	1	3																	14		Clear
Act-sp.	Actea spicata	<input checked="" type="checkbox"/>				1																											1		Clear
Adren-c.	Adrenal cortex	<input checked="" type="checkbox"/>								1																							1		Clear

Type the number of bottles that you have in stock for each remedy. Your initial 'data entry' may take some time depending on how many you have but you'll only have to do it the one time.

IMPORTANT: Check the Remedies in Stock box for each and every remedy you enter.

Use the Notes field to enter odd or non-standard potencies in stock.

Tip: set up a system so that all new bottles ordered from the pharmacy are entered into the inventory first, e.g. a green or red mark on the label to confirm inventory entry.

6X	3C	6C	12X	12C	15C	30X	30C	100X	100C	200X	200C	1M	10M	50M	CM	Grand Total
90	102	251	19	209	1	15	515		5	5	420	182	149	40	31	2,034

Click the Remedies in Stock button then scroll to the very bottom of the screen (use the scroll bar at right) in order to see the total numbers of bottles for each potency as well as a Grand Total.

These are one of a homeopath's few 'assets'. I have my bottles currently insured at a replacement value of \$20,000 (in case of fire or theft). If I ever retire I shall sell or donate my stock of remedies. Documented, donated items are a tax write-off.

**Notes:** This is a basic (simple) inventory list. i.e. it is not a complex sales inventory:

You cannot record which pharmacy your remedies are from nor the sizes of the bottles.

The number of potencies you can keep track of are limited to 30.

The remedy list provided with COMPASS is fairly complete with nearly 3400 remedies. You may add remedies (see Materia Medica Help).



# :Invoices Help:



**:Client Data:** Show All Find Print Help

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS LETTERS SUMMARY PRINT ENVELOPE **INVOICE SUMMARY** ADDRESS BOOK

ID 654 NEW Client Client List All DELETE Client CALENDAR TODAY QUIT C

First/Last Miranda Castro Next Appointment Client Category

Click on the **Invoice Summary** tab at Client Data to view a list of a client's invoices. You can create a new invoice here. You can also access some of the other financial-related features of COMPASS including a **Statement** for that client, the **Payments Due List** or the main **Finances Screen** where you can get to the reports and the checkbook.

To create a **New Invoice** click the blue button. You will be taken automatically to the Invoice Data Entry screen. There are just 3 fields to fill out to complete a new invoice.

Use the **Account Status** pop down menu to flag clients with special needs. It's nice if 'low cost' patients don't have to ask at each appointment. It's also helpful to know which clients need to pre-pay.

If you select **Payment Plan** then check the Payment Plan box and use the field below for any special notes regarding their payment schedule.

**Invoice Summary:** Show All Find Print Help

CLIENT DATA TREATMENT SUMMARY **INVOICE SUMMARY** INVOICE DATA ENTRY STATEMENT 30/60/90 DAY REPORT PAYMENTS DUE LIST FINANCES

Name Elizabeth First DOB Feb 8, 1558 45 Account Status Payment Plan

Parents Henry & Anne ID 1

Company

**Card Details** Credit Card Number Expires Code Name on Card cc Zip Home Zip

Visa 4244 8976 6757 8787 0910 344 Elizabeth First 23232 SL4 1NJ

NEW Invoice Elizabeth First: Visa - 4244 8976 6757 8787 - Exp. 0910 - Security Code 344; Zip on cc statements - 23232

Date	Amount	Payment Date	Amount	Due	Due/Paid/Write Off	Payment Method	Write Off
View Jul 16, 10	371.89			371.89	Due Paid Write Off	Cash	
View Jul 16, 10							

**IMPORTANT:** Before entering credit card details check you are **legally compliant**.

The laws vary from state to state in the US and from country to country with respect to whether you can store credit card data. Or not. In the US, for e.g., if you are held responsible for credit card fraud it can cost \$50,000 per incident in fines.

If you can store this information then fill out the yellow highlighted fields (above). The type of card enters automatically. This data appears automatically at the Payments Due List and at Payment Data Entry.

**Data storage ALWAYS involves data PROTECTION.**  
**Protect your database AND computer with different passwords.**

The Total Amounts you have invoiced, the totals paid and any write-offs (unpaid invoices) show up at the bottom of this screen. These summaries are particularly helpful for long-term clients.

TOTALS	Total Invoices	Total Payments	Total Due	Write Off	Total W/O
	749.89		749.89		



# :Invoices Help—Making Payments:



## GETTING SET UP

Go to **Price List** (bottom button) to add products and/or services.

Go to **Invoice Settings** (bottom button) to add up to two **Tax rates**.

Go to **Edit Menus** to add the amounts most frequently paid to you.

**Entering Data** is quick and easy:

1. Fill out the 3 yellow highlighted fields. A menu pops down in each. Select one and data will pop into relevant fields.

You can **change the tax rate** for a 'current' invoice - just click on the tax header to do so. It will change BACK to your 'default' tax rate for the next invoice.

## :Invoice Data Entry:

Find Print One Print All Edit Menus Help

Friday  
July 16, 2010

CLIENT DATA	INVOICE SUMMARY	INVOICE DATA ENTRY	INVOICE	PAYMENTS DUE LIST	PRINT ENVELOPE
Name: Elizabeth First DOB: Feb 8, 1558 45 Parents: Henry & Anne ID: 1 Company:		Henry & Anne Windsor Windsor Castle Windsor, Berkshire SL4 1NJ			
Invoice Date/Number: Jul 16, 2010 14985 <<FIRST < PREV 2 of 2 NEXT > LAST >>		Account Status: Plan <input checked="" type="checkbox"/>		Payment Status for this Inv. <input checked="" type="radio"/> Due <input type="radio"/> Paid <input type="radio"/> Write Off	

Qty	Product or Service	Description	Amount	Tax	Total
1	PR.CNS	Consultation	350.00		350.00

Note for Invoice	Payment Plan Note	Plan	Sub-total	350.00
			Tax (0) %	0.00
			WA (8.0) %	28.00
			Total	378.00
			Payment	
			Amount Due	378.00

PAYMENT DATA ENTRY			
Elizabeth First: Visa - 4244 8976 6757 8787 - Exp. 0910 - Security Code 344; Zip on cc statements - 23232			
to	Payment Type	Check #	Payment Amount
			Pay in Full
			Make Part Payment

**Making Full Payments:** For single payments click the **Pay in Full** button at this screen and click 'yes'. All relevant data will automatically enter into all relevant fields. The payment status for this invoice will say 'Paid' at the top of this screen - before being paid it says Due.

## Making Part Payment

The **Plan** checkbox (next to Account Status at top of screen) must be checked.

Click the **Make Part Payment** and you will be taken to another screen where you can enter the Payment Amount (and Check # if the payment is a check) and then click **Make this Payment** button.

COMPASS does the rest. The Payment Status continues to read 'Due' until a full payment has been reached.

Account Status	Sub-total	250.00
Payment Plan	Tax (@ 6.255 %)	0.00
Payment Plan <input checked="" type="checkbox"/>	Total	250.00
	Payment	250.00
	Amount Due	0.00

Preferred Payment Type	Payment Status
Cash	<input type="radio"/> Due <input checked="" type="radio"/> Paid <input type="radio"/> Write Off

PAYMENT DATA ENTRY		
Payment Type	Payment Amount	Check #
Cash	100.00	
		Make This Payment
		Cancel - Back to Invoice



# :Invoices Help—Payments Due:



## :Finances:

Print

CLIENT DATA INVOICE SUMMARY CHECKBOOK **PAYMENTS DUE LIST** PRICE LIST FINANCIAL REPORTS

You can get to the Payments Due screen by clicking the Payments Due tab from:

- **Client Data:** click on **Finances** (bottom left of screen) and then Payments Due tab
- **Invoice Summary** or **Invoice Data Entry:** click on the Payments Due tab

## :Payments Due:

Find ALL Payments Find Credit Cards Find Checks Find Todays Print Payment

CLIENT DATA INVOICE SUMMARY INVOICE DATA ENTRY **PAYMENTS DUE: ALL** PAYMENTS DUE: FULL PAYMENTS DUE: PART FINANCIAL REPORTS PRICE LIST WRITE OFFS

	First	Last	Name on Card	Credit Card Number	Expiry	ZIP	Code	Inv Date	Amt Due	Prf Method	Approval	
View	Richard	Third						7 Dec 08	250.00	Cash		Pay Full
View	Miranda	Castro	Miranda Castro	45 EXPIRED 0000 0000 0000	00/00	33062	000	3 Dec 08	106.26	Cash		Pay Full
									356.26			

For clients who pay by credit card: a red EXPIRED message overlays their number if their card information needs updating.

Click the **Pay Full** button once only to pay an invoice in full. All payment data will auto-enter including, date, type and amount.

If you click the Pay Full button twice by mistake COMPASS will enter a second payment of 'zero' - go to the Invoice Data Entry screen to delete that payment.

Payment Date	Payment Type	Check #	Payment Amount	
December 7, 2008	Cash		250.00	⌵
December 7, 2008	Cash		0.00	⌵

At the Payments Due List you can 'filter' the payments (yellow buttons at top of screen) and view all Credit Card payments, or Check payments due or just Today's payments.

Click the **Payments Due: Part** tab to go to a screen showing only clients with payment plans and make multiple payments there (for more than one client)

The **Payments Due: Full** tab shows only clients who are paying in full.

The main **Payments Due: All** screen shows both - if your clients pay in full each time this is the screen you will use and you won't have to worry about the others. If you have clients on Payment Plans then you'll want to use these tabs more carefully.

At the Payments Due screens the figures to the LEFT of the Pay Full button are amounts due.

After clicking the **Pay Full** button the Amt Due becomes 0.00 and the full payment, method and today's date auto-enter to the right of the Pay Full button - the Paid Status changes from Due to Paid

Find Checks Find Todays Print Payments Preview Help

FINANCIAL REPORTS PRICE LIST WRITE OFFS **FINANCES** Enter Payment Data

Inv Date	Amt Due	Prf Method	Approval	Payment	Method	Date Paid	Paid Status
7 Dec 08	250.00	Cash		Pay Full			⊗ Due ○ Paid
3 Dec 08	106.26	Cash		Pay Full	75.00	Cash	7 Dec 08 ⊗ Due ○ Paid
				356.26			

FINANCIAL REPORTS PRICE LIST WRITE OFFS **FINANCES** Enter Payment Data

Inv Date	Amt Due	Prf Method	Approval	Payment	Method	Date Paid	Paid Status
7 Dec 08	0.00	Cash		Pay Full	250.00	Cash	7 Dec 08 ○ Due ⊗ Paid
3 Dec 08	106.26	Cash		Pay Full	75.00	Cash	7 Dec 08 ⊗ Due ○ Paid



# :Invoices Help—Statements:



At the **Invoice Summary** screen see at a glance the totals for all Invoices, all payments made and due.

Click the **Statement** tab, then **Due** for unpaid invoices or **Summary** for paid invoices.

**:Invoice Summary:** Show All Find Print Help

CLIENT DATA TREATMENT SUMMARY INVOICE SUMMARY INVOICE DATA ENTRY **STATEMENT** 30/60/90 DAY REPORT PAYMENT DUE LIST

Name: Elizabeth First DOB: Feb 8, 1558 45 Account Status: P  
 Parents: Henry & Anne ID: 1 Payment Plan: P  
 Company:

Card Details: Credit Card Number: 4244 8976 6757 8787 Expires: 0910 Code: 344 Name on Card: Elizabeth First  
 Visa

NEW Invoice: Elizabeth First: Visa - 4244 8976 6757 8787 - Exp. 0910 - Security Code 344; Zip on cc statements - 23232

Date	Amount	Payment Date	Amount	Due	Due/Paid/Write Off	Payment Method	Write Off
View Jul 18, 10	20.51			20.51	Due Paid Write Off	Cash	
View Jul 16, 10	350.00			350.00	Due Paid Write Off		
View May 1, 10	350.00			350.00	Due Paid Write Off		

TOTALS Total Invoices: 720.51 Total Payments: Total Due: 720.51

Click **Due** and enter a year.

Click **Summary** and go straight to it.

Pages: 1 Total Save as Excel Save as PDF Print Page Setup

Statement View As: Exit Preview Script Is Paused Continue

MIRANDA CASTRO  
HOMEOPATHIC CONSULTANT

Henry & Anne Windsor  
Windsor Castle  
Windsor, Berkshire SL4 1NJ  
UK

July 18, 2010

Statement

Invoice Date	Description	Total Amount	Total Paid	Balance
May 01, 2010	Consultation	350.00	350.00	
Jul 16, 2010	Consultation	350.00	350.00	
Jul 18, 2010	Homeopathy for Pregnancy & Birth (- 10%)	20.51	20.51	
Total		720.51	720.51	

Pages: 1 Total Save as Excel Save as PDF Print Page Setup

Statement Showing Taxes View As: Exit Preview Script Is Paused Continue

MIRANDA CASTRO  
HOMEOPATHIC CONSULTANT

Account Summary  
For Year 2010

Elizabeth First  
Windsor Castle  
Windsor, Berkshire SL4 1NJ  
UK

Printed on July 18, 2010

Date	Description	Amount	Taxes	Payments
May 01, 2010	Consultation	\$350.00		
Jul 16, 2010	Consultation	\$350.00		
Jul 18, 2010	Homeopathy for Pregnancy & Birth (- 10%)	\$17.95	\$2.56	
Total Goods and Services		\$717.95		
Total Taxes		\$2.56		
Total Amount		\$720.51		
Total Payments				
Balance Due on Account		\$720.51		

**Print & Send:** Select **Continue** in the status bar at top to go on to print a Statement or to cancel and return to Invoice Summary screen.

**Aging (Ageing) Report:** View ALL Unpaid (Due) Invoices including: those due within the month, and those that are more than 2 months or 3 months overdue.

**:Invoice Summary:** Show All Find Print Help

CLIENT DATA TREATMENT SUMMARY INVOICE SUMMARY INVOICE DATA ENTRY **STATEMENT** 30/60/90 DAY REPORT PAYMENT DUE LIST

Name: Elizabeth First DOB: Feb 8, 1558 45 Account Status: P  
 Payment Plan: P

**:Aging Report:**

Name	Inv Date	Days Due	Inv Number	Amount Due
<b>Less than 30 days due</b>				
Julie	21 Jul 10	1	14987	100.00
Elizabeth First	18 Jul 10	4	14986	20.51
Elizabeth First	16 Jul 10	6	14985	350.00
Da	2 Jul 10	20	14982	100.00
Christina Windhorse	28 Jun 10	24	14978	75.00
<b>Over 60 days due</b>				
Elizabeth First	1 May 10	82	14984	350.00
<b>Over 90 days due</b>				
Jeff	29 Dec 09	205	14765	-12.00
Total Amount Due				983.51



We are also keen to know whether you would be willing to help with it.  
Many thanks. The Management!

COMPASS Help Manual: December 2008 ... Page 52



# :Labels Help:



Labels are not currently available in A4 format



Send letters, newsletters or cards to a group of clients (in Client Data) or contacts (in Address Book).

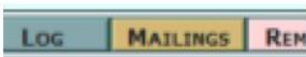
**First** go to Labels Settings (click on the main **Settings** button bottom right of Client Data) and enter your own address in the return address field (or insert a 'logo') - in both places. The second one is for the small return address labels that you can affix to all your own envelopes and packets etc.

<b>Your Return Address for Avery 5163 &amp; Avery 5164 labels (not 5160)</b> From: MIRANDA CASTRO 4474 NW 1st Avenue Gainesville, FL 32607	<b>LABEL: TEXT Option for 6123/6124 labels</b> <b>TEXT OPTION:</b> Use the Format menu to select fonts, sizes and color of fonts as well as other styles to create a return address for your labels.									
<b>Your Return Address for Avery 5163 &amp; Avery 5164 labels (not 5160)</b>	<b>LABEL: LOGO Option</b> <b>LOGO OPTION:</b> Paste your logo into these fields or Insert a .jpeg, .gif or graphic file from your hard drive. Size: 7.25" x 1.5" - 18.4 x 3.8 cm or smaller									
<b>Your Return Address for Avery 5160 labels (return address only)</b>	<b>LABEL: TEXT Option</b> MIRANDA CASTRO 4474 NW 1st Avenue GAINESVILLE, FL 32607 <b>TEXT OPTION:</b> Print out a sheet or 2 of your own addresses for affixing to pre-addressed envelopes like credit card statements etc.									
<b>CLIENT DATA LABELS</b> Click to go to label	<table border="1"> <tr> <td>5160</td> <td>1x1</td> <td>Return Address</td> </tr> <tr> <td>5163</td> <td>1x1</td> <td></td> </tr> <tr> <td>5164</td> <td>1x1</td> <td>Blank</td> </tr> </table>	5160	1x1	Return Address	5163	1x1		5164	1x1	Blank
5160	1x1	Return Address								
5163	1x1									
5164	1x1	Blank								
<b>ADDRESS BOOK LABELS</b> Click to go to label	<table border="1"> <tr> <td>5160</td> <td>1x1</td> </tr> <tr> <td>5163</td> <td>1x1</td> </tr> <tr> <td>5164</td> <td>1x1</td> </tr> </table>	5160	1x1	5163	1x1	5164	1x1			
5160	1x1									
5163	1x1									
5164	1x1									

**Next:** search for a group of clients first: in **Client Data, Tracker, Mass Mailings**, or **Address Book** depending on what kind of mailing you are sending - a newsletter or card to all your clients, or clients in one state, or those from one practice or clients you haven't seen in a year or more and so on.

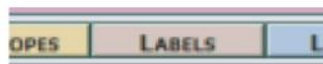
## PRINT LABELS

Once you are happy with your list click on **Mailings** in Client Data (bottom button)



and click on the **Print Labels** tab.

From Address Book go straight to labels (bottom button).



Select a label size and click Preview to make sure everything looks right.

Print one (test) page on scrap paper to double check it. Then go ahead and print.

COMPASS formats the addresses carefully depending on the size of label selected.

## Preview Labels to clients

Marilyn Angelo  
123 End of the Rainbow  
Hawden, HI 12005

Miranda Castro  
4474 NW 1st Avenue  
Gainesville, FL 32607

Fidel Castro  
4474 NW 1st Avenue  
Gainesville, FL 32607

Jim Hoyt  
652 Pear Tree Lane  
Fruity, KS 10101

Jim Hoyt  
Capecon Group  
PO Box 358  
Great Capecon, WV 25422

Jim and Jane Hoyt  
Capecon Group  
5000 Miss School Road  
Great Capecon, WV 25422

Richard Thirt  
18213 Warden Lane  
Oakie, FL 32855

Miranda Castro  
1401 S Ocean Blvd. # 405  
Pompano Beach, FL 33062

## Preview your own Return Address labels

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CASTRO  
4474 NW 1st Avenue  
GAINESVILLE, FL 32607

MIRANDA CA  
4474 NW 1st Ave  
GAINESVILLE, FL 3

MIRANDA CASTRO

MIRANDA CASTRO

MIRANDA CA



## :Labels Help—Remedy Envelopes:



Envelopes Inventory Invoices Labels Letters Menus Pham

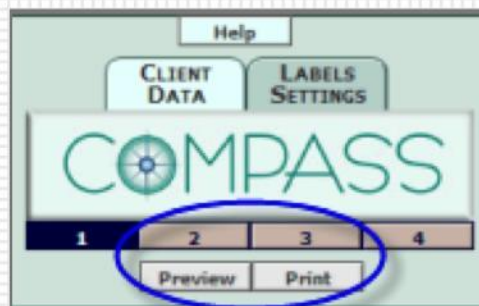
You can only get to these labels from the Labels Settings screen.  
They are handy for dispensing instructions for clients to whom you give remedies out of your own stock.

These labels are US only right now.

Remedy Envelope Number 1	Remedy Envelope Labels for printing on Avery 5173 labels	Remedy Envelope Number 3
Name _____ Remedy _____ 1. Dissolve the contents of this envelope in 4 oz. of water and stir vigorously. 2. Take 1 teaspoon every 2 hrs for 3 doses. 3. Throw the rest away. Don't eat/drink 10 mins before & after each dose	Use these labels to customize the way you instruct clients to take their remedies.  Use the Format menu to select the font, size & color of font.  Print a test page to check everything is lined up properly.	Name _____ Remedy _____
Remedy Envelope Number 2		Remedy Envelope Number 4
Name _____ Remedy _____ 1. Take 1 tablet every 2 hrs for up to _____ doses. 2. Tip out one tablet at a time 3. Let the tablet dissolve under the tongue Don't eat/drink 10 minutes before/after each dose		Name _____ Remedy _____ 1. Take 1 tablet _____ times a day for up to _____ days 2. Tip out one tablet at a time 3. Let the tablet dissolve under the tongue ON IMPROVEMENT STOP & GET IN TOUCH Don't eat/drink 10 minutes before/after each dose

Edit the labels using the Format menu to change style, color, fonts etc. then click the appropriate button below to proceed to the preview and print screen.

REMEDY ENVELOPE LABELS: Click to go to label 1 2 3 4



Click **Preview** to check the labels look right. Then **Print** a test page on scrap paper to double check they are OK before going ahead with the labels proper!



# :Letters Help:



You can write an unlimited number of letters and/or emails to individual clients - a copy of each is automatically kept 'on file.'

FIRST go to the **Letters Settings\*** and:

1. Select your default letter size.
2. Select the **Default Printer**.
3. Create your own **header** and/or **footer**.  
Use the format menu to help you or import your own logo.

\* The **Settings** button is bottom right of the Client Data screen and there's a **Settings** tab at the Letters Summary screen also.

If you have printed letterheads then be sure to remove all data from the footer and header fields. They should all be empty.

Find the client you want to write to, click on the yellow **Single Letter/Email** tab, click the **New Letter or Email** button, and select **Letter**.

At the next screen you can choose whether you want to write a **blank** letter or use one of your **templates**. In the next dialog box you will be asked whether you are writing to an Adult of the Parent (of a child client).

View or Delete any letter or email at the Letters Summary screen.

Delete with Caution: deleted data can never be recovered.

NOTE: Copies of Mass Mailings **are not** kept. You need to print a copy or better still ... create a CLIENT called Mailing Shots or Mass Mailings and a Type of consultation called Mass Mailings or Mailing Shots and save a copy (as a consultation) each time you send out a mass mailing - for the date you send it. You can add notes (about the number of returned emails or any other details to help you with future mailings).



# :Letters Help—Blank Letters:



:Adult Letter:

MIRANDA CASTRO  
HOMEOPATHIC CONSULTANT

Elizabeth First  
Windsor Castle  
Windsor, Berkshire SL4 1NJ

July 17, 2010

Your Royal Highness

It is with great pleasure that I write to you today to advise you .....

Your humble servant etc. etc.

Template: Blank Letter: Adult

Just type away OR insert a template.  
Template titles appear here as well as the list.

The font is set to Verdana 10pt and there are two pages i.e. you can write a 1 or 2 page letter (max 2 pages). You can reduce the font size to write more (Format menu or right click). However, the font for the address and the date will stay the same.

With brief letters add a number of line spaces at the top to position the letter in a better place on the page (closer to the center).

Click Preview to check how your letter looks. Preview is maddeningly imprecise - what you see is not exactly what you get (i.e. your printed out letter will look a little different).

You can see all the letters/emails you have written to a client and toggle between them using the View buttons.

When you create a new letter the Description and Note fields are empty. Select a template and the description automatically enters. You can add a brief note if you wish.

Help

COMPASS

CLIENT DATA SINGLE MAILINGS LETTERS SETTINGS

Copy Name Elizabeth First  
Copy Parents Henry & Anne  
Copy Company  
Copy Next Appt at

Preview Print Letter Print Envelope  
PDF/Email

NEW Letter or Email << < Prev 5 of 5 Next > >> Note

View	Date	Description	Note	
View	Jul 17, 10	Blank Letter: Adult		
View	May 4, 10	Blank Letter: Adult	Invoice resent	
View	May 2, 10	NPL West Palm Beach (Parent - for child)		
View	Feb 4, 06	Email to Parent #3		
View	Jan 20, 06	Appt confirmation WPB (Adult)		

Select	Template Title	Add/Edit All Templates
Select	Blank Email: Parent	View/Edit This Template
Select	Blank Letter: Adult	View/Edit This Template
Select	NPL Adult: Gainesville	View/Edit This Template
Select	NPL Adult: West Palm Beach	View/Edit This Template
Select	NPL Parent (for child): Gainesville	View/Edit This Template
Select	NPL Parent (for child): West Palm Beach	View/Edit This Template
Select	Phone: NPL (Adult)	View/Edit This Template
Select	Phone: NPL (Child)	View/Edit This Template
Select	West Palm Beach: Appt confirmation (Adult)	View/Edit This Template
Select	West Palm Beach: Appt confirmation (Parent)	View/Edit This Template



# :Letters Help—Template Letters:



Templates are for your frequently written letters i.e. appointment confirmations or appointment reminders etc. You can create as many templates as you like and edit them to your heart's content. Name them carefully (they sort alphabetically) so you can find them easily

Use the **Copy** buttons to copy names or appointments to the clipboard. Then paste them (Ctrl/Cmd+V or Right click) into any part of a letter.

Click Preview to check how your letter looks. Preview is maddeningly imprecise - what you see is not exactly what you get (i.e. your printed out letter will look a little different).

NEW Letter or Email	<< < Prev	5 of 5	Next > >>	Note
View	Jul 17, 10	Blank Letter: Adult		
View	May 4, 10	Blank Letter: Adult		Invoice resent
View	May 2, 10	NPL West Palm Beach (Parent - for child)		
View	Feb 4, 06	Email to Parent #3		
View	Jan 20, 06	Appt confirmation WPB (Adult)		

Template Title	Add/Edit All Templates
Select Blank Email: Parent	View/Edit This Template
Select Blank Letter: Adult	View/Edit This Template
Select NPL Adult: Gainesville	View/Edit This Template
Select NPL Adult: West Palm Beach	View/Edit This Template
Select NPL Parent (for child): Gainesville	View/Edit This Template
Select NPL Parent (for child): West Palm Beach	View/Edit This Template
Select Phone: NPL (Adult)	View/Edit This Template
Select Phone: NPL (Child)	View/Edit This Template
Select West Palm Beach: Appt confirmation (Adult)	View/Edit This Template
Select West Palm Beach: Appt confirmation (Parent)	View/Edit This Template

Template: Npl Adult: Gainesville

**MIRANDA CASTRO**  
HOMOEOPATHIC CONSULTANT

July 17, 2010

me I will need to know the state of your current health in  
ire some routine medical history, so please complete the  
you to your first appointment. Please list any medications you  
s, homeopathic and herbal preparations. Please include a list  
u have taken in the past. It is not obligatory for you to fill out  
me at our first appointment.

ation about Homeopathy and my Fee Schedule. If you have  
be time to talk them through when you come to see me.

Select a template and it will 'load' into the letter. The title will appear in the relevant description field in the letters/email list ... you can add a brief note if you like.

If you have typed something in the letter already or selected a different template you will be asked whether you are sure so you do not inadvertently what you have written.

I look forward to seeing you on:

Your appointment is at the office of Pamela Smith (licensed acupuncturist):  
1801 NW 11th Road, Gainesville, FL 32605 (directions are below)  
Please park in the semicircular driveway at the front of the property.  
The office entrance is on the left side of the house (not the front door!)

If you need to change or cancel your appointment please give me 24 hours' notice, otherwise there will be a charge.

Please note that the office is a chemical free environment so I would very much appreciate your not wearing any perfume or cologne on the day of your appointment.

If you get lost or need to contact me urgently on the day of the appointment my cell phone is 954 732 8620 - otherwise the number below is the general one to contact me on.

Many thanks and best wishes  
Miranda

From the West Side of Gainesville: travel east on 8th Avenue  
Turn left at NW 18th Terr (at the light) and right at NW 11th. 1801 is on the right.

From the East Side of Gainesville: travel west on 8th Avenue  
Turn right at NW 18th Terr (at the light) and right at NW 11th. 1801 is on the right.

From the South or Central Part of Gainesville: travel north on NW 13th Street  
Turn Left onto 11th Road - one block past the 10th Avenue light (All Cats Health Clinic is on the corner). 1801 is on the left.

Page 1



# :Letters & Emails Help—Edit Templates:



There are 3 formats to view, edit (and delete) Templates:

1. Full View (one template only)
2. Quick Look (all templates + 6 lines of text - scrollable)
3. List View (All templates + 1 line of text - expandable)

Click **Add/Edit All Templates** to add a template and/or to view all templates at the Quick Look screen and see the first 6 lines of text

Select a template and it will 'load' into the letter at left.

Template Title		Add/Edit All Templates
Select	Blank Email: Parent	View/Edit This Template
Select	Blank Letter: Adult	View/Edit This Template
Select	NPL Adult: Gainesville	View/Edit This Template
Select	NPL Adult: West Palm Beach	View/Edit This Template
Select	NPL Parent (for child): Gainesville	View/Edit This Template
Select	NPL Parent (for child): West Palm Beach	View/Edit This Template
Select	Phone: NPL (Adult)	View/Edit This Template
Select	Phone: NPL (Child)	View/Edit This Template
Select		View/Edit This Template
Select		View/Edit This Template

You can edit the Template Titles here. Just click 'n' type!

Click the **View/Edit** button to see any one template full screen. It is super easy to edit it in this format.

## :Templates—Quick Look:

CLIENT DATA | **TEMPLATES QUICK LOOK** | TEMPLATES LIST | < BACK TO EMAIL OR LETTER

Template Title:  NEW Template

**View/Edit** NPL Adult: Gainesville **Delete Template**

Dear

When you visit me for the first time I will need to know the state of your current health in detail. In addition I will also require some routine medical history, so please complete the enclosed form and bring it with you to your first appointment. Please list any medications you are taking, including supplements, homeopathic and herbal preparations. Please include a list of any homeopathic remedies you have taken in the past. It is not obligatory for you to fill out this form - it just saves a little time at our first appointment.

If you have lots of templates view them as a list by clicking the Templates List tab. At this screen click on any template to 'expand' it fully ... it is editable here.

**View/Edit** NPL Adult: West Palm Beach

Dear

When you visit me for the first time I will need to know the state of your current health in detail. In addition I will also require some routine medical history, so please complete the enclosed form and bring it with you to your first appointment. Please list any medications you are taking, including supplements, homeopathic and herbal preparations. Please include a list of any homeopathic remedies you have taken in the past. It is not obligatory for you to fill out this form - it just saves a little time at our first appointment.

**View/Edit** NPL Parent (for child): Gainesville

Dear

When you visit me for the first time with xxx I will need to know the state of your current health in detail. In addition I will also require some routine medical history, so please complete the enclosed form and bring it with you to your first appointment. Please list any medications you are taking, including supplements, homeopathic and herbal preparations. Please include a list of any homeopathic remedies you have taken in the past. It is not obligatory for you to fill out this form - it just saves a little time at our first appointment.

**View/Edit** NPL Parent (for child): West Palm Beach

Dear

When you visit me for the first time with xxx I will need to know the state of your current health in detail. In addition I will also require some routine medical history, so please complete the enclosed form and bring it with you to your first appointment. Please list any medications you are taking, including supplements, homeopathic and herbal preparations. Please include a list of any homeopathic remedies you have taken in the past. It is not obligatory for you to fill out this form - it just saves a little time at our first appointment.

## :Templates—List:

CLIENT DATA | **TEMPLATES QUICK LOOK** | **TEMPLATES LIST** | < BACK TO EMAIL OR LETTER

Template Name:  NEW Template

Template Name	Template
<b>View/Edit</b> Blank Email: Parent	
<b>View/Edit</b> Blank Letter: Adult	
<b>View/Edit</b> NPL Adult: Gainesville	Dear
<b>View/Edit</b> NPL Adult: West Palm Beach	Dear
<b>View/Edit</b> NPL Parent (for child): Gainesville	
<b>View/Edit</b> NPL Parent (for child): West Palm Beach	
<b>View/Edit</b> Phone: NPL (Adult)	
<b>View/Edit</b> Phone: NPL (Child)	
<b>View/Edit</b> West Palm Beach: Appt confirmation (Adult)	
<b>View/Edit</b> West Palm Beach: Appt confirmation (Parent)	

**COMPASS**

When you visit me for the first time with xxx I will need to know the state of his/her current health in detail. In addition I will also require some routine medical history, so please complete the enclosed form and bring it to your first appointment. Please list any medications currently being taking, including supplements, homeopathic and herbal preparations. Please include a list of any homeopathic remedies that have been taken in the past. It is not obligatory for you to fill out this form - it just saves a little time at our first appointment.

I am sending you some information about Homeopathy and my Fee Schedule in a separate email to make them easier to read. If you have any problems downloading the attachments let me know - I'll happily send them to you by regular mail! If you don't receive any emails with attachments check your spam or junk mail box! If you have any further questions there will be time to talk them through when you come to see me.

I look forward to seeing you on:

Your appointment is at the office of Pamela Smith (licensed acupuncturist):  
1801 NW 11th Road, Gainesville, FL 32605 (directions are below) .  
Please park in the semicircular driveway at the front of the property.  
The office entrance is on the left side of the house (not the front door!)

Please note that the office is a chemical free environment so I would very much appreciate your not wearing any perfume or cologne on the day of your appointment.

If you need to change or cancel your appointment please give me 24 hours' notice, otherwise there will be a charge.

If you get lost or need to contact me urgently on the day of the appointment my cell phone is 954 732 8620 - otherwise the number below is the general one to contact me on.

I suggest printing this email and bringing it with you just in case!

Many thanks and best wishes  
Miranda

From the West Side of Gainesville: travel east on 8th Avenue  
Turn left at NW 18th ~~Turn~~ (at the light) and right at NW 11th. 1801 is on the right.

From the East Side of Gainesville: travel west on 8th Avenue  
Turn right at NW 18th ~~Turn~~ (at the light) and right at NW 11th. 1801 is on the right.

From the South or Central Part of Gainesville: travel north on NW 13th Street  
Turn Left onto 11th Road - one block past the 10th Avenue light (All Cats Health Clinic is on the corner). 1801 is on the left.

From the North of Gainesville: travel south on NW 13th Street  
Turn right onto 11th (All Cats Health Clinic is on the corner) ... 1801 is on the left.



# :Lists Help:



**INVENTORY** **LISTS** **LOG** Go to the main Lists screen from Client Data (bottom button). You'll find lots of list tabs there with brief explanations.

The following 'lists' each have their own help pages (at right): To Do, Follow up, Birthday Cards, Appt/Rx Summary, Referrals, Locum Data & Daily Log.

**:Lists:** Print < REPORTS Saturday 17 July, 2010

**CLIENT DATA** **TO DO LIST** **FOLLOW-UP TRACKER** **BIRTHDAY CARDS** **APPT/RX SUMMARY** **CLIENT LISTS** **COMPANY LISTS** **REFERRALS** **LOCUM DATA** **DAILY LOG**

**TO DO LIST**

Keep track of action items such as:

- cases to work on
- letters to send
- calls to make

i.e. everything that will enable your office to run smoothly and efficiently.

**FOLLOW-UP TRACKER**

Use this list to see who hasn't followed up in a specified length of time i.e. a month or two or more.

Check all clients with a follow up note and find those who've fallen through cracks and need checking up on.

**APPT/RX SUMMARY**

Would you like to see a quick list of every appointment and all remedies given - all on one screen.

Essential for when a client's new practitioner.

**BIRTHDAY CARDS**

Send cards to clients - not just on their birthdays!

**CLIENT LISTS**

Separate lists for clients showing:

Main phone numbers: home, work and cell  
Email addresses  
Snail mail addresses

Clients & Companies pay you for services and/or products.

Clients are individual patients and they are auditable (if you check the audit categories).

**COMPANY LISTS**

Separate lists for companies showing:

Main phone numbers: home, work and cell  
Email addresses  
Snail mail addresses

**REFERRALS**

Fill out the referral box on the Client Data screen and you'll be able to track where your clients are coming from.

Create good will by sending thank you cards.

Network by getting in touch with the practitioners who send you clients and taking them out to lunch.

Track the effects of your marketing efforts by counting how many referrals come from talks you have given or articles you have written.

**LOCUM DATA**

Export a list of clients and remedies given as well as contact information (phone and email) to a file that you can give or email to the homeopath who is looking after your practice while you are away.

**DAILY LOG**

Get a list of the clients you have 'worked on' today, yesterday or the previous week including:

- new clients added
- case notes (new or added to)
- invoices (new or paid)
- remedies (new or changed)

Use this to keep on top of client tasks

There are 3 Client and 3 Company Lists: one with phone numbers, one with emails and one with addresses. Each list can be sorted using pink headers. You can do quick searches at each screen - by first or last name (the A-Z buttons) or open searches by clicking the find button and entering data into a relevant field i.e. all clients in a certain state or county or those with a certain area code etc.

**Tip:** Companies are organizations or schools or clinics who pay you for your services or products. Don't enter any data into the company field for a patient in order to keep your 'companies' separate from your 'individual clients or patients'.

**:Client List—phone:** Show All Find Print List Help Saturday July 17, 2010 COMPASS

**CLIENT DATA** **CLIENTS: PHONES** **CLIENTS: EMAILS** **CLIENTS: ADDRESSES** **COMPANIES: PHONES** **COMPANIES: EMAILS** **COMPANIES: ADDRESSES** < LISTS

First A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Last A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	First Name	Last Name	Parents	Date Created	Last Appt.	Last Invoice	Last Remedy	NMM
<b>View</b>	Ziggy Pupsicle	Ellen		Nov 9, 08				<input type="checkbox"/> DELETE
<b>View</b>	Alice	Mirandina		Nov 9, 08				<input type="checkbox"/> DELETE
<b>View</b>	Amanda Adnama	Enter Name	954 532 3636	954 564 1106	954 547 4633	Dec 3, 08		<input checked="" type="checkbox"/> DELETE
<b>View</b>	Nick Angelo	Marilyn Angelo	020 7431 2063	+44 162 854 6664	123 456 7890	Mar 12, 03	Sep 11, 08	Mar 28, 08 <input checked="" type="checkbox"/> DELETE
<b>View</b>	Angela Angelo	Jim Hoyt				Jan 20, 04	Jun 29, 09	Aug 20, 04 <input type="checkbox"/> DELETE
<b>View</b>	Randini Castro		954 532 3636	954 564 1106	954 547 4633	Jul 9, 03	Jun 30, 10	Nov 3, 09 <input type="checkbox"/> DELETE
<b>View</b>	Randini Castro	Fidel Castro	954 532 3636	352 505 8545	954 732 8620	Jul 23, 03	Jan 6, 09	Dec 30, 08 <input type="checkbox"/> DELETE



## :Locum Data Help:



You can export a group of clients or all your current clients basic information to an excel file to share with another practitioner. This feature is invaluable for when you are out of town and your clients are being taken care of by someone else, especially if that person does not have access your office and/or your patients' charts.

As long as you have entered these details yourself they will be exported. Those details include basic contact information, appointment dates and prescription details.

How to search for and export client data is explained in detail at the Locum Data screen. If you have any difficulty making it work for you please contact us - we shall be more than happy to help you.

Current/active clients include all 'categorized' clients (clients with a Client Category checked).

The basic details for a selected group are exported to an Excel File entitled Locum Data.

This file is located in your Documents folder and it should open automatically.

### Exported Data:

Full Name  
Parents  
Date of Birth  
City  
email  
phone h.  
cell  
phone b.  
Date of Consult  
Type of Consult  
Presenting Complaint  
Date of Rx  
Remedy  
Potency  
Dosage  
# of Doses  
Repetition  
Remedy Response  
Aggravation  
Aggravation Notes  
Law of Cure  
Law of Cure Notes

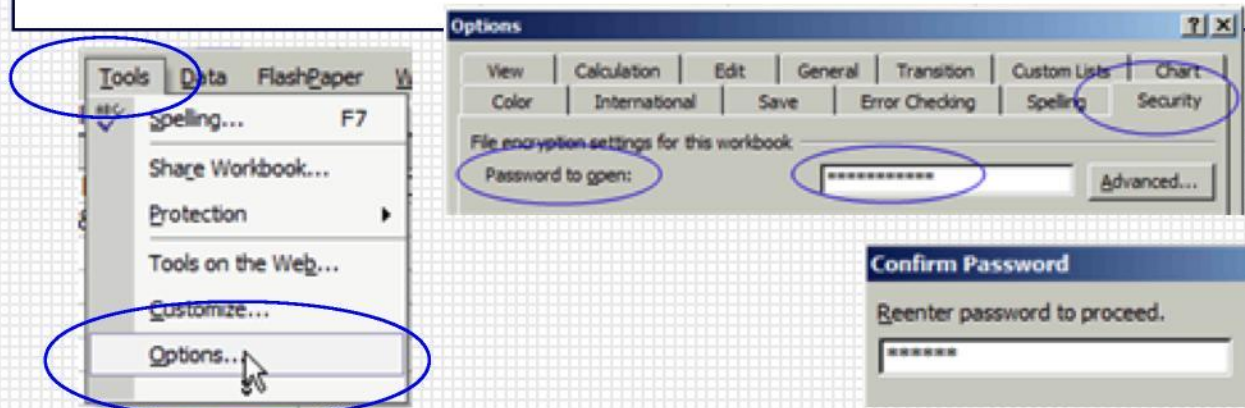
### Password protect the excel file in order to preserve your client's confidentiality:

**You are legally required to password protect ALL electronically stored information**

You have to do this each and every time you export data to a file.

1. Go to the Tools Menu
2. Select Options
3. Click on the Security tab
4. Enter a password and confirm it
5. On exit click Yes to Save changes
6. Open the file to check the password works.

You'll find the file in your COMPASS folder





# :Mass Mailing Help:



LOG MAILINGS REMEDIES

:Mailings:

CLIENT DATA SINGLE LETTER/EMAIL MASS MAILING PRINT LABELS

Single Letter or Email Mass Mailings: Letters and E-mails

Choose Mass Mailing Type

Choose to send mass email or letter.

Cancel Letter Email

Click on Mailings (bottom button at Client Data) and then click on the Mass Mailings tab - you'll be asked whether you want to send a letter or an email.

Follow the instructions 'on screen' to:

1. Find a group of clients to write to
2. Check and refine the list of clients
3. Write the letter or email
4. Preview then Print out a test letter or send a test email to check the content of the letter/email and the header/footer or signature etc. are all correct.

NOTE: Copies of Mass Mailings **are not** kept. You need to print a copy or better still ... create a CLIENT called Mailing Shots or Mass Mailings and a Type of consultation called Mass Mailings or Mailing Shots and save a copy (as a consultation) each time you send out a mass mailing - for the date you send it. You can add notes (about the number of returned emails or any other details to help you with future mailings).

:Mass eMailing:  
Email to Adult

CLIENT DATA EMAIL SETTINGS MASS MAILING

Search for a group then check it ...

Select a Group: Find Emails

View/check/edit List: Email List

View Sent Emails View Sent Emails

Click to select a type of email:

BLANK email:	Adult	Parent
LAST Appt Notice:	Adult	Parent
NEXT Appt Reminder:	Adult	Parent

Name	Nick Angelo
Parents	Marilyn Angelo
Company	

Send TEST Email Send THIS Email

Print One Email Send ALL Emails

Use these buttons to:

1. Find a group of clients to write to
2. Check and refine the list of clients

OR you can search for a group at the Tracker screen (or Client Data) and then select a type of letter or email and write it!

Select a **letter** or **email** 'type':

**BLANK** - for general mailing shots or information about your practice etc.

**LAST Appt Notice**: to write to clients who haven't been in for a follow up appointment - to remind them that it's time to check in with you. You'll get a flurry of appointments - this is especially helpful during natural 'slumps' i.e. the summer and the new year.

**NEXT Appt Reminder**: to let people know about an up-coming appointment. You won't get any more 'no-shows' (as long as you have their correct email address of course).

Select **Parents** if your clients are children

Finally, print one letter (THIS letter) to check it. Then go ahead and print ALL letter as well as envelopes or labels.

If you need any help with this - any help at all - **please call us** - we'd be more than happy to walk you through this incredibly valuable feature.

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COMPASS Help Manual: December 2008 ... Page 61



# :Mass Mailing Help—Letters:



## MIRANDA CASTRO HOMEOPATHIC CONSULTANT

Angela Angelo  
532 Pear Tree Lane,  
Fruity, KS 10101

Sunday, December 21, 2008

Dear Angela

Type your letter below

I am writing to let you know that I shall be out of the office from the 8th until the 23rd of April.

If you would like to see me or speak with me before I leave please call to schedule an appointment ASAP (352 505 8545).

If you need urgent homeopathic advice while I am away please call Janet Rucker AP, CCH, on 352 373 8868. She will have access to a list of the remedies you have taken but only if you give her permission. If you reach her voice mail make sure you leave a full message including your name, your phone number, times when you will be available and brief details of the nature of your call.

All non-urgent messages sent to me by email or left on my voice mail after the 8th of April will be returned on or after the 23rd of April.

With all best wishes  
Miranda

You can format parts of a letter using **bold**, *italics* or **different colors** for headers or special parts you want to stand out. You can select a handwritten font like **Lucida**, or **Bradley** for your signature.

You'll find these features in the **Format menu**.

You shouldn't change the font of the body of your letters because the address, date and last or next appointment notifications are all in Verdana 10pt so changing the body of the letter would look a bit odd.

You can write a maximum of 2 pages.

There's a note on the page roughly where the first page ends.

**Preview Letter** does not give you a precise view - you have to print a test letter to check that your letter fits nicely on one page, or the break is where it should be.

Always print a **Test Letter** (Print THIS Letter) before printing all the letters of a mailing shot. Be sure to select **print all pages** (for 2 pages of a mailing shot) or **page 1 of 1** for just one page.

**IMPORTANT:** Letters written in Mass Mailing are NOT saved.

You can print one out and file it in a 'Mass Mailings' file (an actual one!) Or ... you can create a New Client called Mass Mailings or Mailing Shots (in the Company Name field) ... then create a new case note for each mass mailing you send out. You can add notes (in Case Notes or in the Themes/Keynotes field) about which group of clients you sent it to - how many were in the group and any notes about the responses you receive.

Help

**:Mass Mailing:  
Letter to Adult**

CLIENT DATA LETTERS SETTINGS MASS MAILING

Search for a group then check it ...

Select a Group: Find Addresses

View/check/edit List: Address List

Click to select a type of letter:

BLANK Letter:	Adult	Parent
LAST Appt Notice:	Adult	Parent
NEXT Appt Reminder:	Adult	Parent

Preview Letter

Print THIS Letter

Print ALL Letters

Print Envelopes

Print Labels

Send a letter to a group of clients.

1. Click Find Addresses to select or re-select a group. After searching you will be taken to the Address List screen.
2. Check the list is correct.
3. Click the Back to Letter to return here, and write the letter!
4. Click Headers/Footers & Paper/Print Setups to make sure everything is set up correctly.
5. Make sure there's enough paper in your printer.
4. Print THIS Letter to check it - and keep it on file. Remember, copies of the mass mailings are not saved in Compass.

Click Address List at any time to check and/or edit the group selected.

Page 1



## :Mass Mailing Help—Emails:



Check here for verification that an email is sent successful - including the date.

Sent email date and message: Dec 23, 2008 Email Sent Successfully.

From: email@mirandacastro.com To: mirandacastro@aol.com

Subject: My News

Dear " " this greeting appears automatically with the first name inserted  
Dear Miranda

Email Message - Enter your message below

\*\*\* South Florida Dates \*\*\*  
I shall be in Boca next on the 10th and 11th of October, the 13th and 14th of November and the 12th and 13th of December - I get booked up fairly quickly so please let me know if you would like an appointment.

.....

\*\*\* Getting in Touch with Me \*\*\*  
This is my main and most reliable email: [mirandacastro@cox.net](mailto:mirandacastro@cox.net)  
My aol email still works but emails sent there get lost on occasion. So annoying!

This is my main phone number: 352-505-8545  
My old number (954-332-3636) still works but it rings into my main number ... into the same phone and the same voice mail so you NEVER have to leave 2 messages!

I have an unlimited local and long distance account with my phone company so if you need a telephone appointment with me please always feel free to ask me to call you!

.....

\*\*\* Hurricane Season \*\*\*  
So far this year the hurricanes have brought some much-needed rain but thankfully not too much destruction to Florida. If you experienced flooding with subsequent mold problems in your home and this affected your health please feel free to let me know. There are a number of homeopathic solutions - depending on your symptoms.

.....

\*\*\* Talking About the Flu! \*\*\*  
Flu season is around the corner. Again! With that in mind here is a great resource: The National Center for Homeopathy has made all the articles they have published about the flu and homeopathy over the past 8 years available at their website. You can read them here whether you are a member or not: <http://nationalcenterforhomeopathy.org/services/flu/forum/index.jsp>

Please let me know if you are trying to decide whether to have the flu vaccine (or give it to your children). There are effective and non-toxic homeopathic alternatives.

.....

~~If you love homeopathy, then please consider joining the NCH - the only resource~~

MIRANDA CASTRO, Homeopathic Consultant  
Mailing: 4474 NW 1st Ave. Gainesville, FL 32607  
Gainesville Office: 1801 NW 11th Road, Gainesville, FL 32605  
Boca Office: 8549 Surrey Lane, Boca Raton, FL 33496  
Phone: 352-505-8545  
Emails: [mirandacastro@cox.net](mailto:mirandacastro@cox.net)  
Website: [www.mirandacastro.com](http://www.mirandacastro.com)

### :Mass eMailing: Email to Parent

CLIENT  
DATA

EMAIL  
SETTINGS

MASS  
MAILING

Search for a group then check it ...

Select a Group: Find Emails

View/check/edit List: Email List

View Sent Emails: View Sent Emails

Click to select a type of email:

BLANK email: Adult Parent

LAST Appt Notice: Adult Parent

NEXT Appt Reminder: Adult Parent

Add Attachment to Email: Detach

Send TEST Email

Send THIS Email

Print One Email

Send ALL Emails

### **Always ALWAYS ALWAYS**

**send a Test Email** before sending all emails of a mailing shot. A test email is sent to you - to your own email address. Check it carefully - including (especially) your 'signature' and double double check any 'links' by clicking every single one yourself. You can even print it out or forward to a friend or colleague - this is especially wise before sending out a mailing shot to hundreds of patients.

The length of emails is not limited i.e. you can write as much as you like.

Emails are sent in plain text so there isn't much formatting you can apply. The more formatting there is the higher the chance that it will end up in someone's spam or junk mail folder. Use line spaces and periods or dashes --- - - - or other characters ~~~ to add a bit of 'formatting' so that your emails are easier to read. Be judicious in your use of CAPS - this is email lingo for SHOUTING!

IMPORTANT: Mass emails are NOT saved.

You can create a folder in your email program (email client) called Mailing Shots and file the final test email you send to yourself there. Or ... you can create a New Client called Mass Mailings or Mailing Shots (in the Company Name field) ... then create a new case note for each mass email you send out. You can add notes (in Case Notes or in the Themes/Keynotes field) about which group of clients you sent it to - how many were in the group and any notes about the responses you receive.



# :Materia Medica Help:



To view all the remedies in COMPASS go the main Remedy List by clicking on **Remedies** (bottom button in Client Data) or the **Remedy List** tab in Remedy Details.

You'll find a Remedy List tab at the Materia Medica and Inventory screens and Remedy List buttons at the Treatment Summary and Remedy Details layouts. They all take you to this layout where you can Find Duplicates, view just the HPUS remedies or add a **New Remedy** to the materia medica. Remedies added also show in the Inventory list.

**:Remedy List:** Show All Find Print Help Sunday December 21, 2008

CLIENT DATA REMEDY DETAILS REMEDY AUDITS **REMEDY LIST** MATERIA MEDICA INVENTORY

You can add new remedies here. Delete and edit them with caution.

	NEW Remedy	Full Remedy Name	Find Duplicates	US Homeopathic Pharmacopoeia	
View	A-dnphen.	A-dnphen.			EDIT
View	Abel	Abelmoschus		ABELMOSCHUS	EDIT
View	Abies-a.	Abies alba			EDIT
View	Abies-bal.	Abies balsamea			EDIT
View	Abies-c.	Abies canadensis		ABIES CANADENSIS	EDIT
View	Abies-n.	Abies nigra		ABIES NIGRA	EDIT
View	Abrom-aug.	Abroma augusta			EDIT
View	Abrot.	Abrotanum		ABROTANUM	EDIT

To add a remedy click the blue button and follow the directions at this next screen. Click the blue Add Remedy button when you are ready.

If you make a mistake click cancel. You can also go to Remedy List screen and search for a remedy which you can then edit or delete.

**IMPORTANT:**  
Abbreviations must include a period at the end as well as any dashes in the correct places for COMPASS to be able to properly Test for their uniqueness.

**:Add Remedy:** Help

CLIENT DATA REMEDY DETAILS REMEDY AUDITS **ADD REMEDY** MATERIA MEDICA INVENTORY

Enter the Abbreviation and the Remedy Name.  
New remedies must be unique (for obvious reasons!)  
The pop down menus will help with this.

You can double check by clicking Test after entering the Abbreviation and the Remedy Name  
The word "unique" appears to the right if it is - and "exists" appears if it not. (You cannot 'test' the HPUS Name.)

Abbreviation  Test

Remedy Name  Test

HPUS Name

Cancel Add Remedy

Acknowledgments: Thanks to Washington Homeopathic Products for the remedy list.

[www.homeopathyworks.com](http://www.homeopathyworks.com)



# :Materia Medica Help—Create Your Own:



## MATERIA MEDICA

Create your own Materia Medica with information gathered from teachers, seminars and cases etc. Each remedy has its own screen and includes a general notes field, a separate field for keynotes or themes etc., and places for up to 3 photos.

**:Materia Medica:** Show All Find Print Help Sunday December 21, 2008


CLIENT DATA REMEDY DETAILS REMEDY AUDITS REMEDY LIST MATERIA MEDICA INVENTORY

Find Your Materia Medica View List

Full Name Anacardium orientale Abbrev. Anac. HPUS Name ANACARDIUM ORIENTALE  
Common Name/s Marking nut Note Plant Family

Photos **CAUTION** General Notes << First < Prev 2 of 40 Next > Last >> Keynotes/themes

Title http://www. Insert Zn Del from A Homeopathic Guide to Stress by Miranda Castro © 1996



Title Insert Zn Del

**Emotional state**  
Anger, Anxiety, Anxiety with fear: before an exam/interview etc. Concentration difficult. Domineering. Isolated. Lack of self confidence. Memory weak. Morose. Suspicious. Vindictive.

**Emotional stresses**  
Transition: worry.

This remedy is for those suffering from nervous exhaustion as a result of over-study or exam nerves. It is also useful for those who are experiencing an identity crisis with inner suffering – at any age. There are two opposing forces inside, an intense inner conflict which produces the sensation of being pulled in two directions. A sense of inferiority or low self esteem develops, and with it anxiety and indecision. They will even say they feel 'in two minds'.

On the one side they feel worthless and inferior. They are constantly trying to prove themselves because of a fear of failure, because of their low self confidence. If this isn't healed then another side will develop as a result of an inner split. An inflexible, bad-tempered, 'hard-hearted' side. Children or adults needing this remedy become suspicious and vindictive without remorse for their actions. Their anger can surface in the form of outbursts in which they swear compulsively.

As the tension builds inside they harden up in order to try and cope and end up feeling like they are living in a dream. There's a sensation of unreality and isolation that increases if they continue not to integrate new feelings. Once worn out they become confused and can't find their thoughts. Their memory fails them and they can't remember what they have read. They become absent-minded and apathetic and don't want to work.

**General state**  
Face pale with dark rings around eyes.  
Pains constricting: cramping: pressing.  
Senses weakened.

**Keynotes/themes**  
Identity crisis  
With inner suffering  
Isolated and unreal

Insert a picture of a substance. Click on insert picture and select the picture on your computer or just 'paste' it in (Ctrl/Cmd+V).

Click in the General Notes and type away. Paste information from another document, or from the web.

Use the Keynotes/themes field for top level information about a remedy

Find 'your' Materia Medica - remedies you have written in by clicking the yellow find button at the top then toggle through using the Next/Prev/First/Last buttons or View List to see them all and also to see a list of all the remedies without information - this is a handy studying tool. Use the small Note field for family or other similar data.

< Back	Your Materia Medica	Remedies with NO info	Show All	Print	Help
Full Name	Common Name/s	Note			
View Ambr. Ambra grisea	Ambergris				
View Anac. Anacardium orientale	Marking nut	Plant Family			
View Apis Apis mellifica	Honey bee				
View Arg-n. Argentum nitricum	Silver nitrate				
View Arn. Arnica montana	Leopard's bane				
View Ars. Arsenicum album	Arsenic trioxide				
View Aur. Aurum metallicum	Gold				
View Bar.c. Baryta carbonica	Barium carbonate				

Acknowledgments: Thanks to Miranda Castro (!) for the Materia Medica from A Homeopathic Guide to Stress.

www.homeopathyworks.com



# :Notepads Help:



You'll find a few notepads as you navigate about compass

1. The main 'scratch' notepad at the right of your screen.
2. An extra notepad for each client (Miscellaneous Notes in Client Data)

**:Client Data:** Show All Find Print Edit Menus Help Friday July 23, 2010

COMPASS

Client ID: 1 NEW Client Client List: All DELETE Client QUIT COMPASS

First/Last: Elizabeth First

Primary Parent: Henry & Anne

Company: Windsor Castle

DOB/Age: February 8 1558 452 Sex: F

Address 1: Windsor Castle

Address 2: wing

City: Windsor

County/State: Berkshire

Postcode/Zip: SL4 1NJ

Country: UK No Mass Mail

Home Phone: 020 7766 7304

Cell/Mobile: 020 7930 9625

Fax: 020 7930 9625

Send Email Copy

Website: www.royal.gov.uk

Job/School: Dr Spock

Primary Doctor: Dr Spock

Referred by: Abbie Cornish

Referral Source: Lady in Waiting

Family Note: One sister

Select Primary Parent: Normal Expand

Relationship to Elizabeth: First Last Add a Relation

View: Son Richard First

Miscellaneous Notes

Elizabethfirst@royal.gov.uk

faker

Spends half the year at Edinburgh Castle

Note to self:

Be sure to observe palace protocol at all times

CALENDAR: New Appt

Next Appt:

Last Appt: Tue, Jan 10, 2006

TRACKER: New Track Clear

Follow up Tracker

Date: Sat, May 22, 2010

Check up on (on due date)

Due Date: Fri, May 28, 2010

To Dos: New Action Clear

To Do List

Date:

Priority:

PHOTOS: Elizabeth First Windsor Castle Windsor Berkshire SL4 1NJ, UK Work ph: 020 7766 7304

Account Status: Plan

Payment Plan

Client Category: 2

General (not pt)

West Palm

Gainesville

Inquiries

Students

Shop/Creams

Tampa

Audit Data: Clear

New Client

Similitum

Similar/s

Doing Well

Variable

No Response

No Feedback

Non Current

Forms On File

Hard Copy Computer

MBF

Gen. Consent

Release: Consult

Release: Teach

Release: Publish

Other P-S-F

Shopping:

Eggs

Bread

Lemons

Envelopes

String

Post office (mail remedies)

Pick up dry cleaning

Cases to Work up:

Angela Angelo

Odesa Hoyt

Calls to Return:

Richard the Third - schedule appt

Elizabeth the First - acute (cystitis)

Projects:

Teaching prep for w/end

Patient Information Leaflet

Mailing Shot

Personal:

Get movie from Blockbusters

DIRECTIONS FINANCES INVENTORY LISTS LOG MAILINGS REMEDIES

User Level: Basic Advanced Switch Created: Jan 5, 2006 Modified: Jul 18, 2010

3. A mini notepad for each client's To Do (Client Data)

4. An extra notepad for each contact (Notes in Address Book)

The **main notepad** is an invaluable tool for keeping all notes to yourself in one place. Jot down anything you don't want to forget - even thoughts about another patient in the middle of a consultation can be written here and transferred later.

Use it for shopping lists, calls to return, immediate tasks, anything that needs doing that you need to remember without having to 'look it up.' This notepad follows you wherever you go! You'll find this same notepad at most screens.

COMPASS

End Top NOTES Print Notepad

Shopping:

Eggs

Bread

Lemons

Envelopes

String

Post office (mail remedies)

Pick up dry cleaning

Cases to Work up:

Angela Angelo

Odesa Hoyt

Calls to Return:

Richard the Third - schedule appt

Elizabeth the First - acute (cystitis)

Projects:

Teaching prep for w/end

Patient Information Leaflet

Mailing Shot

Personal:

Get movie from Blockbusters

ADDRESS LIST CATEGORY LIST TASKS CHECKBOOK

Checkbook Payee

Notes

Vacation Message

This is Miranda Castro speaking

I am out of the office now until Monday the 27th of September.

If you need homeopathic advice while I am away please contact Karen Allen at 415-944-8896. that's Karen Allen 415 944 8896

She has a regular call in time Mondays - Thursdays between 10:00-11:00 am or you can leave a voice mail message at any other time and she'll get back to you.

You can also leave a message here on my voice mail at any time and I'll get back to you on my return - or I shall be available all day on Monday the 27th to answer your calls and emails directly.

Thank you

Have a great month.

Shop:

Eggs

Bread

Lemons

Envelopes

String

Post office (mail remedies)

Pick up dry cleaning

Cases to Work up:

Angela Angelo

Odesa Hoyt

Calls to Return:

Richard the Third - schedule appt

Elizabeth the First - acute (cystitis)

Projects:

Teaching prep for w/end

Patient Information Leaflet

Mailing Shot

Personal:

Get movie from Blockbusters

The notepad in the Address Book is linked to each contact - use it for information about that person, contact, company etc. that you want to be able to see quickly and easily. Insert the date (Cmd/Ctrl and -) for anything that might be time sensitive.

This is my outgoing Voicemail message - always easy to find!



# :Outcomes Audit Help:



Outcomes Audits are the heart of COMPASS. They will help you measure your treatment results. This is where you get to measure the results of your work and see clearly where your strengths lie, and identify which areas need some attention, some improvement.

Assign (or reassign) a category (at Client Data) after each and every consultation for this feature to work.

Make sure you reassess each client's audit category periodically to check they are correct and up to date.

Go to Client Data **Settings** (bottom button) and check that the categories make sense to you and the way you work.

New Client and Non Current are 'fixed' i.e. those categories cannot be changed. The others can be changed - at any time although you have to be careful and thoughtful about this with regard to clients who have already been 'categorized.'

Audit Categories	
Audit Category 1	New Client
Audit Category 2	Simillimum
Audit Category 3	Similar/s
Audit Category 4	Doing Well
Audit Category 5	Variable
Audit Category 6	No Response
Audit Category 7	No Feedback

These categories reflect a client's overall response to homeopathic treatment rather than their responses to individual remedies.

See **Remedy Audits** for responses to remedies.

These audit categories and criteria are based on Miranda Castro's clinical experience and have been refined over 25 years of practice. They are not definitive and we welcome all suggestions.

Audit Data	Clear ?
<input type="radio"/> New Client	
<input type="radio"/> Simillimum	
<input checked="" type="radio"/> Similar/s	
<input type="radio"/> Doing Well	
<input type="radio"/> Variable	
<input type="radio"/> No Response	
<input type="radio"/> No Feedback	
<input checked="" type="checkbox"/> Non Current	

Auditing your practice will take it into new and exciting territories.

Measuring the outcomes of your work on a regular basis can take a bit of courage and is always rewarding.

Use this as a tool for reflecting on your practice, for making changes to the way you work, for setting new goals, or for reaffirming current ones. Above all you can (and should) use it to get in touch with clients in any category and to ask them about their experience with homeopathy ... whether it met their expectations or exceeded them - or not.

REMEDIES REPORTS SETTINGS

OUTCOMES  
AUDIT

Check out the Outcomes Audit screen by clicking on **Reports** in Client Data (bottom button) and Click on the **Outcomes Audit** tab.

**Force yourself** to do these 2 things during (or after if necessary) each and every consultation:

1. Note the **effects of the last remedy**: Response, Aggravation, Law of Cure. (5-10 seconds)
2. Reevaluate their **Audit Category** - how well are they doing (or not). (5-10 seconds)

This way, your most important practice audits will always be up to date.



# :Outcomes Audit Help—Classifying Clients:



At first glance the **Outcomes Audit** screen looks like it has a lot going on. You'll quickly get the hang of it and appreciate how much information is readily available in once place.

Most buttons are self explanatory: You can click Show All at top of screen to see how ALL your clients are doing - and to review and reassign their categories as needed.

Click on '**Calculate Auditable Clients**' - this is the main button at this screen - it searches for current clients which excludes non-current clients, new clients and those with no feedback. It then sorts the resultant list automatically by the clients Last Name.

Find Unassigned Clients:  
Click this button to find all clients who have not yet been assigned an Audit Category.

**:Outcomes Audit:** Show All Find Print Help Friday July 23, 2010

**CLIENT DATA** **OUTCOMES AUDIT** **REMEDY AUDITS** **AGE & SEX** **RESEARCH** **COMPLAINTS REPORT** **SETTINGS** **REPORTS**

**Calculate Auditable Clients** Total Records **17** **Find unassigned clients**

	First Name	Last Name	New Client	Simillimum	Similar/s	Doing Well	Variable	No Response	No Feedback	Non Current	Date Last Appt	
<a href="#">View</a>	Elizabeth	First	<input checked="" type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	January 10, 2006
<a href="#">View</a>	Nick	Angelo	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input checked="" type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input checked="" type="checkbox"/>	<a href="#">Clear</a>	May 20, 2004
<a href="#">View</a>	Randini	Castro	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input checked="" type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input checked="" type="checkbox"/>	<a href="#">Clear</a>	July 6, 2006
<a href="#">View</a>	Randini	Castro	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input checked="" type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input checked="" type="checkbox"/>	<a href="#">Clear</a>	July 16, 2005
<a href="#">View</a>	Angela	Angelo	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input checked="" type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	June 29, 2009
<a href="#">View</a>	Jim	Hoyt	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input checked="" type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	July 11, 2005
<a href="#">View</a>	Odessa	Hoyt	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input checked="" type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input checked="" type="checkbox"/>	<a href="#">Clear</a>	December 31, 2005
<a href="#">View</a>	Richard	Third	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input checked="" type="radio"/> No Response	<input type="radio"/> No Feedback	<input checked="" type="checkbox"/>	<a href="#">Clear</a>	January 5, 2006
<a href="#">View</a>	Miranda	Castro	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input checked="" type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input checked="" type="checkbox"/>	<a href="#">Clear</a>	November 2, 2008
<a href="#">View</a>	Richard	Pitt	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	
<a href="#">View</a>	Ziggy	Pupsicle	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	
<a href="#">View</a>	Mirandina	Castrolini	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input checked="" type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	
<a href="#">View</a>	Alice		<input type="radio"/> New Client	<input checked="" type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	
<a href="#">View</a>	Daniel	Castro	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input checked="" type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	April 1, 2010
<a href="#">View</a>	Amanda	Adnama	<input type="radio"/> New Client	<input checked="" type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	
<a href="#">View</a>	Yolanda	Castro	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	
<a href="#">View</a>	Mother Betty	Ford	<input type="radio"/> New Client	<input type="radio"/> Simillimum	<input type="radio"/> Similar/s	<input type="radio"/> Doing Well	<input type="radio"/> Variable	<input type="radio"/> No Response	<input type="radio"/> No Feedback	<input type="checkbox"/>	<a href="#">Clear</a>	

New Client	Simillimum	Similar/s	Doing Well	Variable	No Response	No Feedback	Non Current
1 7.7%	2 15.4%	3 23.1%	3 23.1%	2 15.4%	2 15.4%	0 0.0%	6 46.2%

At the bottom of the screen you can now see the numbers in each category and the percentage those numbers represent of that whole category. In this small sample for example, 7.7% are too new to know about yet, 61.6% are doing well (simillimums or similars), 15.4% sometimes do well and sometimes don't and 15.4% keep coming back but are no better at all.

Clicking on the yellow headers (at the top or the bottom of the screen) finds all clients in that category and sorts them automatically by their Last Name. You'll see that the headers are yellow. Clicking on these does not 'sort' as do the pink headers elsewhere.

There are just 3 pink sort buttons (first name, last name and date of last appt). Clicking on these will NOT change your group.

If you make a mistake and want to clear all audit data for a client click the Clear button - this will not get rid of your client!



# :Outcomes Audit Help—Categories:



Categories 3, 4, 5 & 6 **ARE** counted in the 'audit calculation'.  
Categories 1, 7 & 8 **ARE NOT** counted in the 'audit calculation'.

**1. New Client:** This category is separate in order to differentiate clients for whom you have no feedback from other returning or non-returning client categories.

**2. Simillimum:** Improvements on every level with 1 remedy including all of the following:

- The presenting complaint/s clear/s up
- Increased sense of well being
- An aggravation (hopefully it is mild if the potency is correct)
- A return of old symptoms

In addition over time the following are also confirmed:

- Increased resistance to disease
- Ability to manage constitutional and other stressors easier (without falling ill)
- Same remedy works in an acute illness
- Client doesn't need to return so often

**3. Similar/s** " The client improves over time. Improvements include ALL of the following:

- More than one remedy is involved
- Remedies change over time
- There's a logic to remedy changes i.e.related/layers/miasmatic influences etc.
- Overall increased sense of well-being
- Some remedies cause an aggravation but not all do so.

In addition over time the following will also be confirmed:

- The current constitutional remedy doesn't work in an acute illness
- The client is vulnerable to stressors and tends to fall sick.
- Client returns on a regular basis.

**4. Doing Well:** There is a good response including 2 or more of the following:

- An aggravation
- A return of symptoms
- An increased sense of well being
- It worked in an acute
- The presenting symptoms/complaints are better

However ... it's too soon to know whether this is the Simillimum or a Similar remedy. There will be times when this is a 'false positive' due to other factors perhaps, when the client reverts to the Variable or No Response category.

Ideally 1- 2 years should elapse to give a remedy a chance to really prove itself.

**5. Variable:** Sometimes a remedy helps, sometimes it doesn't.

- There isn't a significant overall sense of well-being in spite of an improvement in their symptoms.
- The client's symptoms tend to return
- Their ability to withstand stress is not improved

**6. No Response:** Client isn't responding to treatment.

- Symptoms do not change or pathology/s progresses as expected

**7. No Feedback**

Client came once and hasn't returned

Client hasn't returned in 6 months or more

**8. Non Current:** Clients are known to be no longer consulting with you because:

- You have referred them to another homeopath or another practitioner.
- They have referred themselves to another homeopath or practitioner.
- They moved house or are deceased etc.



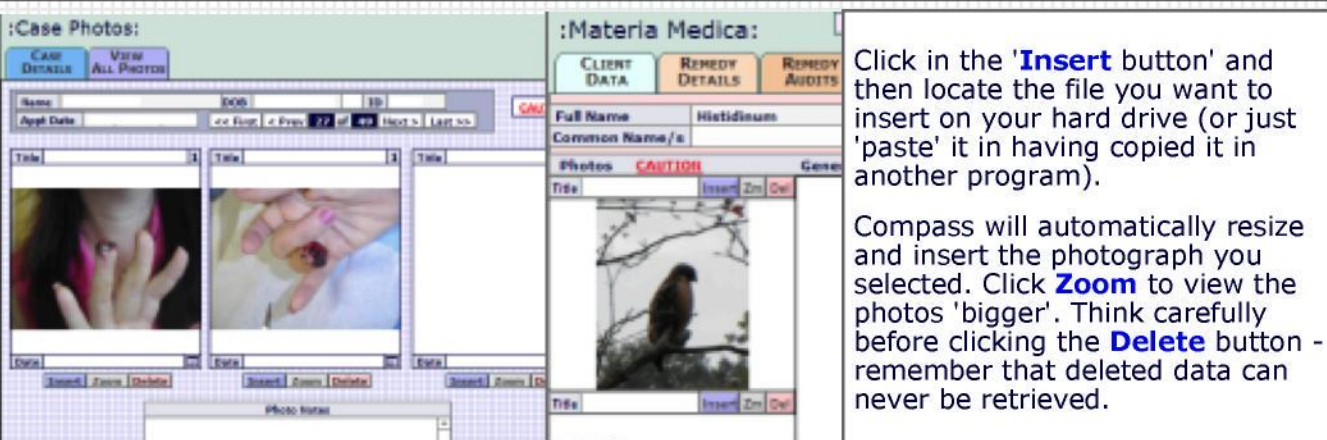
## :Photos Help:





There are TWO mini photo albums in COMPASS: one for each client in Client Data (6 photos per client) and one for each contact in the **Address Book** (3 photos per contact).

There are also TWO other places where you can place photos: **Case Details** (3 photos per case note/per appointment) and **Materia Medica** (3 photos per remedy).



Click in the **'Insert'** button and then locate the file you want to insert on your hard drive (or just 'paste' it in having copied it in another program).

Compass will automatically resize and insert the photograph you selected. Click **Zoom** to view the photos 'bigger'. Think carefully before clicking the **Delete** button - remember that deleted data can never be retrieved.

Keep pictures of each stage of a client's rash or injury etc. Everyone forgets over time.

Import photos in a **low resolution** format as too many high resolution photos can make your program large very quickly, taking up space on your computer's hard drive and making back-up slow and cumbersome.

You must have a camera (digital or SLR) and some means of uploading photographs to your computer in order to use this feature. Save the photograph in a .jpg format (the most economical size-wise).



# :Price List Help:



Enter each Product & Service that you invoice clients for here.

Give each one a code that makes sense depending on what kinds of products or services you are selling and how many of each you anticipate selling i.e. it isn't worth giving a code to something you are only going to sell a few of.

These codes make filling out invoicing a breeze. They also make your reports interesting - you'll be able to track which products are worth bothering with because they are profitable for you - and which are not so much!

## :Prices Details:

Show All Find Print Help

Sunday  
December 21, 2008



CLIENT DATA		INVOICE DATA ENTRY	PRICES DETAILS	PRICE LIST	FINANCES	
	Code	Description	NEW Product or Service	Product Type	Class	Price Taxable
View	BK	Books Misc		Book	Sales	
View	BK.BH	Biochemic Handbook		Sales		3.95
View	BK.CHH	Complete Homeopathy Handbook (- 20%)		Book	Sales	14.50
View	BK.CHH2	Complete Homeopathy Handbook (incl S/H)		Sales	Book	16.95
View	BK.MB	Homeopathy for Pregnancy & Birth (- 20%)		Sales	Book	16.00
View	BK.MB2	Homeopathy for Pregnancy/Birth (incl S/H)		Sales	Book	18.95
View	BK.STR	Homeopathic Guide to Stress (- 20%)		Sales	Book	17.50
View	BK.STR2	Homeopathic Guide to Stress (incl S/H)		Sales	Book	20.95
View	CN.Misc	Compass Misc Payment		Sales		
View	CN.GEN	General Consultancy		Service	Consultancy	
View	CN.NCH	Editorial Consultancy		Service	Consultancy	
View	CNS	Consultation		Service	Consultancy	
View	CR.7	Seven Cream		Sales	Cream	17.00
View	CR.Joints	Healing Cream for Joints		Sales	Cream	30.00
View	CR.Scars	Healing Cream for Scars		Sales	Cream	30.00
View	DISC	Discount		Misc	Misc	
View	EX.GEN	Expenses - general		Misc	Misc - non tax	
View	EX.TRV	Travel		Misc	Misc - non tax	
View	KT.CS	Cell Salt Kit		Kit	Sales	40.00
View	KT.GEN	Natural Health Supply Kits		Sales	Kit	
View	KT.MB	Pregnancy & Birth Kit		Sales	Kit	75.00
View	KT.HC	Castro's Complete Remedy Kit		Sales	Sales	160.65
View	KT.HC2	Castro's Complete Remedy Kit		Sales	Sales	169.00
View	LAM	SFLC Storage Room		Misc	Misc	100.00
View	MISC	Miscellaneous		Sales		
View	PR.ADM	Administrative Support		Service	Service	
View	PR.CAN	Cancellation Fee for Missed Appointment		Service	Service	
View	PR.CNS	Consultation		Service	Service	
View	PR.REF	Refund		Service	Service	

To get here click on the Finances button (bottom button in Client Data or at the Invoice Data Entry screens), then click on the Price List tab.

You can view, check and edit your list here and also Add New items.

:Prices Details: Show All Find Print Help

CLIENT DATA INVOICE DATA ENTRY PRICES DETAILS PRICE LIST FINANCES

NEW Product or Service Delete

Code	BK.BH
Description	Biochemic Handbook
Class	
Product Type	Sales
Price Each	3.95
Taxable	<input checked="" type="checkbox"/> Check box if Sales Tax
Comments	

Date Created March 20, 2008  
Date Modified March 20, 2008

Click on **New Product or Service** at the **Price List** screen - or here at the **Price Details** screen.

Enter all relevant data here including:

- a **code** (shows on invoices)
- a brief **description** (shows on invoices)
- **class** and **product type** (does not show)
- **price** (show on invoices)
- **comments** (does not show)

Check the tax box if the product needs to be taxed - the amount (plus all other information) will automatically enter when you select the code for this product in an invoice.

Use the comments box to make notes about discounted products or order reminders - be sure to always add a date each time you write a note in this field - you will never regret it!



# :Referrals Help:



**:Client Data:** Show All Find

**CLIENT DATA** **TREATMENT SUMMARY** **CASE NOTES** **REMEDY DETAILS** **LETTER SUMMARY**

Client ID: 1 NEW Client

First/Last: Elizabeth First

Primary Parent: Henry & Anne

Company:

DOB/Age: February 8 1558 452 Sex: F

Address 1: Windsor Castle

Address 2: wing

City: Windsor

County/State: Berkshire

Postcode/Zip: SL4 1NJ

Country: UK No Mass Mail

Home Phone:

Work Phone: 020 7766 7304

Cell/Mobile:

Fax: 020 7930 9625

Send Email Copy

Website: www.royal.gov.uk

Job/School:

Primary Doctor: Dr Spock

Referred by: Abbie Cornish

Referral Source: Lady in Waiting

Family Note:

Select a Primary: Blog

Relationship to El: Flyer

View Son: Friend

Homeopath

Internet

Mailing Shot

Medical Doctor

Print Ad

Relative

Talk

Website

Yellow Pages

Use this feature to see where are your clients coming from. It's helpful (and good for the health of your business) to know which friend, relative, patient or colleague is making consistent referrals or the most referrals?

Which of your marketing or promotional efforts generates the most clients: Your email newsletters, postcards, advertising, your website, articles, workshops or introductory talks.

You'll be able to see where your promotions are not working so well and reassess whether to continue investing your time and/or money on promotions that produce little (or no) 'returns'.

Referred by: Type the name of a person. If they have referred other patients to you their name will automatically appear.

Referral source: Where did this referral come from - a current client, a friend or relative of a client, a friend, a colleague? Or did they come from a yellow page or google ad, a talk you gave, an article you write, or your web site and so on?

INVENTORY

LISTS

LOG

REFERRALS

Click on the Lists button in **Client Data** (bottom button) and then the **Referrals** tab to get to the main Referrals screen.

Clicking on the Referrals tab automatically finds all clients with any data in one of the referral fields.

**:Referrals List:** Show All Find Print List Help Tuesday December 23, 2008

**CLIENT DATA** **REFERRALS** < LISTS

Find All Referrals

	First Name	Last Name	Parents	Referred By	Referral Source	Date 1st Visit	Date Last Visit
<a href="#">View</a>	Elizabeth	First	Henry & Anne Windsor	Abbie Cornish	Lady in Waiting	Jan 5, 2006	Jan 10, 2006
<a href="#">View</a>	Nick	Angelo	Marilyn Angelo	Ellen Alan	Friend	Mar 12, 2003	May 20, 2004
<a href="#">View</a>	Miranda	Castro		Nick Eard	Friend	Jul 9, 2003	Jul 6, 2006
<a href="#">View</a>	Miranda	Castro	Fidel Castro		Internet	Jul 23, 2003	Jul 16, 2005
<a href="#">View</a>	Angela	Angelo	Jim Hoyt	Lady in Waiting	Friend	Jan 20, 2004	Jan 21, 2004
<a href="#">View</a>	Jim	Hoyt			Mailing Shot	Jan 21, 2004	Jul 11, 2005
<a href="#">View</a>	Odessa	Hoyt	Jim and Jane Hoyt		Print Ad	Aug 26, 2004	Dec 31, 2005
<a href="#">View</a>	Richard	Third		Queen Mum	Relative	Jan 1, 2006	Jan 5, 2006
<a href="#">View</a>	Miranda	Castro			Internet	Jul 29, 2006	Nov 2, 2008
<a href="#">View</a>	Ziggy	Pupside	Ellen Goldman			Nov 9, 2008	

Create good will by sending thank you cards. Make sure you have a signed consent form from your clients giving you permission to name them. If they do not want you to name them then just send a general thank you for their referrals, their confidence in your work.

Get in touch with local practitioners who send you clients and take them out to lunch, or better still, get to know their work and refer your clients to them when appropriate.



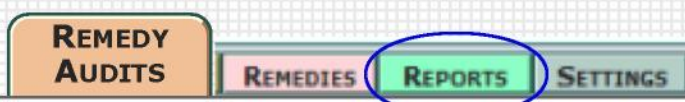
# :Remedy Audits Help:



## Remedy Audits v. Outcomes Audit

Remedy Audits collate individual prescriptions - the effects of one or more remedies.  
The Outcomes Audit collates one or more patients' overall results to treatment.

You can search for certain remedies - this is great for if you want to study or teach a remedy, you can learn a lot about a remedy by studying a group of clients who each received the same remedy. You can check potencies - and see which potencies you are prescribing most often. You can measure your confidence levels against your results! Seeing where a high degree of confidence matches a positive result - or not as the case may be. You can search for all remedies given in a certain time period (a day, week or a month) - to get a sense of the general shape of your prescribing patterns - or to make sure you are not over-prescribing one remedy!



You get to the Remedy Audit screens by clicking on the Remedy Audits tab at the Reports screen (bottom button in Client Data). You'll also find the same tab at the Remedy Details screen.

There are several different types of Remedy Audit depending on the information you need and how you wish to use it.

The General Remedy Audits (first 4 tabs) enable you to examine various aspects of your prescriptions - either individually or in carefully selected groups.

The Master Lists (last 3 tabs) provide helpful summary lists relating to remedies given.

### Gen Remedy Audit

View the remedy dosage and response fields in almost limitless ways:

- all of one patient's prescriptions
- or one remedy and all patients
- or just the curative prescriptions etc.

### Rationale Audit

As long as you have selected a 'rationale' for each prescription you can analyze them here - seeing which rationales reliably produce curative results for example.

### LM Audit

Use this screen to examine and make changes to your LM prescribing protocols. Or not of course!

### Pharmacy Audit

Use this to see which pharmacies you use most often and whether there are any differences in results.

## :Remedy Audit—General:

Show All Find Print List Help



### All Rx One Client

Click this tab to view all the remedies given to a single client.

### All Rx All Clients

Click this tab to view all the remedies given to all your clients.

### Master List/Pool

Click this tab to view a complete list of all the remedies you have given (recorded in COMPASS) i.e. your own 'pool' of remedies.







## :Remedy Audits Help—Master Lists:



### :Remedy Audit—General:

Show All Find Print List Help

CLIENT  
DATA

REMEDY  
DETAILS

GEN REMEDY  
AUDITS

RATIONALE  
AUDIT

LM  
AUDIT

PHARMACY  
AUDIT

ALL RX  
ONE CLIENT

ALL RX  
ALL CLIENTS

MASTER  
LIST/POOL

The **Master Remedy Lists** are for examining your big picture

Layout: Master List.../One Client

View As:

Matching Records: Include Omit

Script Is Paused

Continue

### :Master List—All Remedies/One Client:

Show All Find Print List Help

CLIENT  
DATA

REMEDY  
DETAILS

GEN REMEDY  
AUDITS

RATIONALE  
AUDIT

LM  
AUDIT

PHARMACY  
AUDIT

ALL RX  
ONE CLIENT

ALL RX  
ALL CLIENTS

MASTER  
LIST/POOL

First Last

Remedy Name

Click to Exclude Duplicates for each Client

View

Elizabeth First

**All Rx/One Client:** Click the tab and then **OK** then type the name of a client at the next screen. All the prescriptions for that client and the date for each prescription will appear.

Certain patients, esp. the young, the old or complex patients can rack up many remedies over time. View a simple list here, omitting the duplicates (or not) and export the whole list to an excel file then copy it back to a patient's chart for a quick and easy check at every appointment.

#### Export List

Click the export list button and COMPASS will export the list to an excel file and open it. You can highlight the list itself and copy it back into a client's case notes. Make sure you locate and delete that file - you'll find it in My Docs (Windows.)

You can view/print a comprehensive list for each patient with dates at the Appointment Summary screen,

**All Rx/All Clients:** Use this to view the biggest picture ... to scroll through a list of all the remedies you have given (minus the duplicates for each client).

This is brilliant for studying a remedy that you have given successfully to several patients i.e. your best cases. Especially a small remedy. To understand the remedy better and to then write it up for publication or to teach it. You can see which remedies you are giving more frequently as well as those you are not prescribing.

You can also search here for all remedies in a group i.e. all Aurums

Toggle between this screen and the General Remedy Audit screen in order to see more details for each prescription.

**Master List/Practitioner's 'Pool':** View a list of all the remedies you have given (all those recorded in COMPASS) i.e. your own 'pool' of remedies. This is helpful for seeing those you have given as well as those you haven't given. Yet.

Use this feature to focus on the remedies or groups of remedies you wish to study next.

	Remedy Name	Click to V
Aur-ar.	Aurum arsenicum	
Aur-ar.	Aurum arsenicum	
Aur-ar.	Aurum arsenicum	
Aur-ar.	Aurum arsenicum	
Aur-ar.	Aurum arsenicum	
Aur-ar.	Aurum arsenicum	
Aur-l.	Aurum iodatum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur.	Aurum metallicum	
Aur-m.	Aurum muriaticum	
Aur-m.	Aurum muriaticum	
Aur-m-n.	Aurum muriaticum natronatum	
Aur-m-n.	Aurum muriaticum natronatum	
Aur-m-n.	Aurum muriaticum natronatum	
Aur-m-n.	Aurum muriaticum natronatum	
Aur-s.	Aurum sulphuratum	
Aur-s.	Aurum sulphuratum	



## :Remedy Details Help:



There's a lot of information stored at this one screen. You can get to it from Client Data, Treatment Summary, Case Notes and Case Details as well as the Materia Medica, Inventory and Remedy Audit screens.

Remedy Details is almost everything to do with each and every remedy you give and why as well as its response/s. There's a place to jot down the remedies a client has at home - this is handy for acutes and then everything else is about any instructions you give to your clients about where to get their remedies and how to take them.

The main fields include the remedy date, remedy name, potency and dosage or repetition protocols as well as the form (wet or dry), what category of disease (acute or chronic etc.) and your confidence in the remedy. You can also record the form of the remedy (tablets/globules etc.) and which pharmacy it comes from.

Create a new remedy: click the **New Remedy** button at Treatment Summary or at this screen. Today's date is entered and the field highlighted in case you want to change it. \*

**:Remedy Details:** Find Print Edit Menus Help Friday July 23, 2010

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS REMEDY AUDITS MATERIA MEDICA INVENTORY

Name Elizabeth First DOB Feb 8, 1558 45 Parents Henry & Anne ID 1

NEW Remedy Duplicate << First < Prev 1 of 3 Next > Last >> Remedy List: View/Change/Add

Date	Name	Potency	Dose	Repeated Dose	Doses	Days	Form.	Category	Confidence
Jan 10, 2006	Hyos.	30C	Repeated	bid	6	3	Dry	Chronic	93

Remedy Form	Pharmacy	Repeated Dose 2	Repeated Dose 3

Use the **tab** key to jump to the first field - to the remedy field. Type to the remedy in the pop down menu - type the first 1-4 letters and then use the arrow keys on your keyboard or the scroll bar in the menu to find the remedy you need then click. Press the enter key on your keyboard to jump to the next field and type to the potency - press enter/type to the dose - press enter/type to dosage - and so on through all the fields. Note: if you are on a laptop you will need to press Ctrl/Cmd + Enter.

In addition to noting whether remedies are taken wet or dry you can track whether it's in tablet, pilule, globule or liquid form, and which pharmacy manufactured the remedy.

There are 2 extra fields for additional dosage instructions.

Track the reliability of your 'guts' by selecting a confidence levels with each remedy.: to denote how sure you are. Compare those levels with the results.

\* Click the 'calendar icon' in the date field to view a calendar by month. Click on any other date to select it. Click on the month to scroll to another month, ditto with the year - or use the arrows if you just want to go back or forward one month. You can also click in the field and type another date - the formatting is fairly flexible i.e. it will recognize 1/2/08, or 01/02/2008 or any combo thereof.

Date 1/2/2009

January, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 1/2/2009



# :Remedy Details Help—LMs & Response Data:



**:Remedy Details:** Find Print Edit Menus Help January 2

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS REMEDY AUDITS MATERIA MEDICA INVENTORY

LMs Bottle Shakes Drops Spoon Glass

Name: Elizabeth First DOB: Feb 9, 1958 45 Parents: Henry & Anne Windsor ID: 1

NEW Remedy Duplicate << First < Prev 1 of 2 Next > Last >> Remedy List: View/Change/Add

Date	Name	Potency Dose	Repeated Dose	Doses Dose	Form	Category	Confidence
Jan 10, 2008	Hyos.	30C	Repeated	bid	0	3 Dry Chronic	93

Remedy Form Pharmacy Repeated Dose 2 Repeated Dose 3

Remedy Rationale

1	Pathology
2	
3	
4	

Remedy Response

Gen Response

Aggravation

Law of Cure Sx ☐

Law of Cure Note

Instructions to Client

LETTER A4 Pharmacy Details Settings

CHM PHARMA, Miami - 1-800-903-7646/303-470-7556  
http://chmpharma.com/  
Hahnemann Labs: 800-427-6422 hahnemannlabs.com  
Homeopathy Overnight: 800-ARRECA 30 - www.homeopathyovernight.com (800-276-4223)  
Natural Health Supply: 800-689-1608 - www.a2zhomeopathy.com  
Remedy Source: 877-821-2159 remedysource.com  
Washington Homeopathic Products: 800-336-1695 www.homeopathyworks.com  
Helios Homeopathic Pharmacy - UK:  
011-44-1892-536393 (v/m) 1892-537254 (live person)  
Email: order@helios.co.uk  
Website: www.helios.co.uk  
Ainsworth UK: 011-44 (0)1892-536393

Remedies Client has at Home

ERK - 30C  
Ust 200 and 1M  
Calc p 6X

> Morrisons Rationales

## LM Remedy Details

Record exactly how a patient is taking their LM potencies including:

- The size of the bottle,
- The number of shakes before each dose.
- The number of drops OR the size of spoon
- Whether they are taking their dose from the 1st, 2nd or 3rd glass etc.

Keep a note of the remedies a client has at home. This field is the same across every single remedy for this patient. You'll never have to go looking for this info. It's a great time-saver and helpful for acutes and follow-ups.

**Remedy Rationale**

1	Pathology
2	
3	
4	

## Remedy Rationale

The more rationales you have the more confident you can be in your choice of remedy. If you use these fields you'll be able to see which prescribing rationales work best - and which are not so effective.

If you select a remedy where the **Totality** of symptoms, the **Etiology** and the important **Keynotes** all fit you can be pretty confident in it. Less so if you have just Etiology or just Totality and Keynotes. Much less so if you just have Essence or Pathology.

It's helpful to flag any unusual rationales like a small remedy (or a polycryst) chosen on the basis of a SRP or any genuine Synthetic prescriptions i.e. where there's no

**Morrison's Rationales** proving for the small remedy you have chosen (typically a salt).

**Remedy Response**

Gen Response

Aggravation

Law of Cure Sx ☐

Law of Cure Note

## Remedy Response

If you do nothing else be sure to fill out the first 3 fields: it couldn't be quicker or easier. You will not regret it.

The **General Response**: was this remedy generally curative or what? There are a number of choices and as with all menus it are completely customizable (Edit Menus at top of screen).

Was there an **Aggravation** or none. If there was one you'll want to quantify its severity.

Was there a **return of any old symptoms**. Check that box if there were. You can add a brief note about whether they appeared in reverse order or not or were long-lasting or severe or any other brief note to act as a reminder.



# :Remedy Details Help—Instructions to Client:



## Instructions to Client

It's incredibly helpful to have any instructions you gave to a patient regarding a remedy visible at this screen. Patients can be interestingly creative with how they take their remedies - having a record of how you wanted them to do so is good practice.

Click the Copy button for any instructions in this field to be copied to your clipboard. You can 'paste' these into an email or any other program.

Click the Letter button (or A4) to view a proper letter with any instructions now placed in the body of that letter. You can edit it there, then print it out the old-fashioned way! This is helpful for remedies you are sending to patients - with personalized instructions.

## Pharmacy Details

It's useful to have these in one place - in the place where you often need them. Make a list of your own faves - the ones you use most often and update it as needed.

You can edit it here or at the Settings screen. This field is always the same in every single client's chart at all remedy detail screens.

You can use this field to jot down any verbal instructions or you can use a template if you are sending instructions in an email or by mail.

The screenshot shows the 'Remedy Details' screen with several callouts:

- A callout points to the 'Instructions to Client' field, which is a large text area with a 'Copy' button next to it.
- A callout points to the 'Letter A4' button, which is used to view a proper letter with instructions.
- A callout points to the 'Pharmacy Details' field, which contains a list of pharmacies and their contact information.
- A callout points to the 'Settings' button, which is used to edit the pharmacy details.
- A callout points to the 'Copy' button next to the 'Instructions to Client' field.

Copy	Adult: Dry Dose	Copy	Child: LMs
Copy	Adult: Wet (Test) Dose	Copy	Additional Notes: Adult
Copy	Adult: LMs	Copy	Additional Notes: Child
Copy	Child: Dry	Copy	REMINDERS - FAQs
Copy	Child: Wet	Copy	

The templates are fully customizable - write them up any way you wish. You'll need to go to the Settings screen to do so.

The headers are also customizable - you can change them here at this screen or at the Settings screen.

Click the Copy button for that template to be popped into the Instructions field  
Click any other Copy button for a second template, 'Additional Notes' for example, to be added at the end of the first template.





## CASE ANALYSIS STRATEGIES by Roger Morrison

1. **Essence + Keynote +Totality.** Rare: about 1% of all cases. 100% curative no matter what the illness (chronic/acute etc.)
2. **Essence +Totality,** or **Essence + Keynote.** Curative rate is 95 %
3. **Totality + Keynote.** Comprises large number of cases. Curative rate is 85%
4. **Delusions.** A consistent error of thinking that is characteristic of that person's mind set. You must have one or more strong symptoms (generals or particulars) to confirm the remedy.
5. **Strange, Rare and Peculiar.** One strong symptom of the case that is characteristic or a particular remedy. The symptom is unusual in and of itself. Bizarre or even weird.
6. **Totality only.**
7. **Essence only.**
8. **Etiology.**
9. **Main Pathology.** If you cannot find one remedy that covers the whole person, whole case. Try a specific remedy based on repertorization of the main symptom.
10. **Recent Symptoms.**
11. **Keynotes Only.** When totality is confusing, essence unclear and the most reliable or recent symptoms do not point to one remedy. Use three keynotes from separate areas of the case (not all the main pathology or generals like food cravings). This is a flatter picture, but considered the "3 legs of the stool" and often used in acute prescribing.
12. **Keynote Essence.**
13. **Concomitant Symptoms.** A combination of at least two symptoms that are well known in a particular remedy.
14. **Cluster of Keynotes.**
15. **Synthetic prescription.** One remedy doesn't cover the whole picture, yet it is partially covered by two remedies. Consider the combined salt. You need a general or other symptom to confirm the new remedy.

These case analysis strategies are listed roughly in order of importance and reliability. They are summarized from articles written by Roger Morrison MD in the Journal of the American Institute for Homeopathy 1990-1991: Methods of Case analysis I-IV. As always, the quality of information available for case analysis in any case will depend on the completeness of the case taken and the ability of the practitioner to perceive what needs to be cured. Summarized by Ellen Goldman ND (Homeopathy In Review).



# :Reports Help:



There are a many difference 'information summaries' in COMPASS to look at your data in different ways. They are divided roughly into Audits, Lists, Reports and Research.

**AUDITS.** These are summaries of practitioner's assessments:

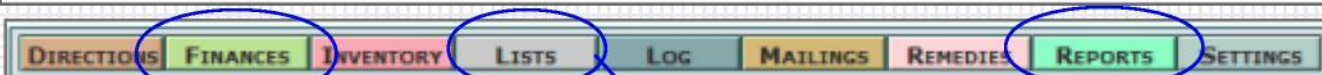
**Outcomes Audit** (overall response to treatment - practitioner's evaluation)

**Remedy Audits** (responses to individual remedies - practitioner's evaluation)

**LISTS.** These are simple affairs, names plus phone numbers, emails or addresses - nothing fancy, just lists. There are several in Client Data (your clients) and your Address Book (your contacts).

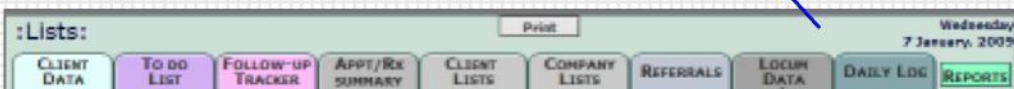
**REPORTS.** These mostly take facts and/or numbers and crunch them to provide summary information that is based on facts and figures. Complaints falls into this group because the data used is not based on opinion (practitioner's or client's).

**RESEARCH.** This group of reports is based on data you collect from your patients about how they think your therapies have helped them. It is instructive to measure your evaluations against theirs.



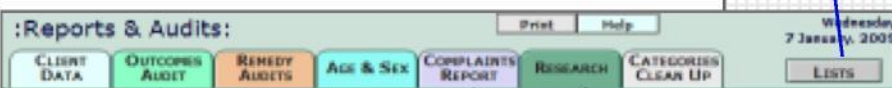
## **FINANCIAL REPORTS & AUDITS.**

To get to these click the Finances button (bottom button at Client Data)



**LISTS.** Click the **Lists** button (bottom button at Client Data) to get to any of the following:

- Appt/Rx Summary \*
- Client Lists - Phones/Emails/Addresses
- Company Lists - Phones/Emails/Address
- Daily Log \* (or click **Log** - bottom button at Client Data)
- Follow up Tracker \*
- Locum Data \*
- Referrals \*
- To Do List \*



**REPORTS & AUDITS.** Click **Reports** (bottom button at Client Data) to get to the following:

- Age & Sex Report \*
- Complaints Report \*
- Outcomes Audit \*
- Remedy Audits \*
- Research \*
- Categories Clean Up

## **Categories Clean Up**

Check that your clients are correctly 'categorized' and make changes easily at this screen - especially if you make any changes in clinic categories.

\* For more information see entry in Help Manual



## :Research Help:



**Audits.** The general outcomes audit and remedy audits are where you determine how a client is doing based on their feedback and your judgment and/or observations/perceptions.

**Research.** In COMPASS this is where you ask your clients how they are doing and record their responses. Comparing the two - your assessment and their assessment - can be interesting - especially if it is different.

The European Committee for Homeopathy are working to create standards and write policy documents to help homeopathic clinicians gather usable data from their practices.

Click to view their document explaining more about the use of these (and other) research tools in homeopathic practice >

### Data Collection in Practice

#### VAS: Visual Analog Scale

Looking at the line below where would you say you fall in terms of how you feel overall or since your last homeopathic visit.

Place a vertical mark on the line that best describes where or how you feel right now. Don't 'think' too hard or long about this.

0 = the best you could be

10 = the worst you could be

0 \_\_\_\_\_ 10

#### WELL BEING INDICATOR

How would you rate your general feeling of well-being right now or compared to how it was at your last homeopathic visit? Score your well being by circling your chosen number.

0 = as good as it could be

6 = as bad as it could be

Sense of well-being: 0 1 2 3 4 5 6

What word or phrase would best describe your overall sense of well-being right now

#### COMPLAINTS RATING

Choose 1-3 symptoms (physical or mental) which bother you the most.

Write them on the lines. Now consider how bad each symptom is right now or compared to how it was at your last homeopathic visit. Score it by circling your chosen number.

0 = as good as it could be

6 = as bad as it could be

Sx 1: .....

0 1 2 3 4 5 6

Sx 2: .....

0 1 2 3 4 5 6

Sx 3: .....

0 1 2 3 4 5 6

Print out this form at the main screen and give it to your clients to fill out. Preferably on their own. They should not feel like they have to 'please you'. This will automatically happen in your presence.

These are tools that researchers in the field of alternative and complementary medicine have found effect in measuring patient treatment outcomes. You can use one or more or all of them.

You can give one form to fill out before an appointment and another afterwards. Homeopathy clients who haven't been in for a while may have forgotten how they were feeling the last time they saw you and talking with you may change their perception of how they are doing.

Ask them not to think too much but to answer the questions 'instinctively'.

Then check the relevant boxes at the VAS, Well-being and/or Complaints screens plus add any relevant comments. Depending on the purpose of this research - if it's for a group or clinic study for e.g. - you may also need a signed consent form for each client. It is interesting for clinics (including teaching or school clinics) to select a group (by age, sex or complaint etc.) and follow that group over a period of time & quantify the results.



Remember, not everything that happens in a person's life after they take a homeopathic remedy, is due to the remedy!

COMPASS Help Manual: December 2008 ... Page 82



## :Research Help—Well Being Indicator:



The Well-being Indicator plus the Complaints Rating in COMPASS have been adapted from the MYMOP's scale.

MYMOP stands for 'Measure Your Medical Outcomes Profile' and was developed in the 1990s by Dr Charlotte Patterson (UK) to evaluate the effectiveness of complementary and alternative therapists (CAM) in her practice. MYMOP has become a popular measurement tool for many CAM therapists, nurses and researchers.

The following are adapted from Clare Relton's 8 Reason's to Use MYMOP

1. Helps the practitioner and the patient focus on the objectives of the treatment.
2. Provides benchmarks at each stage thereby enabling progress to be measured
3. Helps patient recognize any improvements.
4. Helps set treatment goals
5. Provides summary information and can be used to audit one's practice.
6. Can be used to provide statistical data regarding improvement rates.
7. Can be used to provide information that is publishable.
8. It becomes evidence for the effectiveness of your therapy for certain types of patient and/or their complaints.

### WELL BEING INDICATOR

How would you rate your general feeling of well-being right now or compared to how it was at your last homeopathic visit? Score your well being by circling your chosen number.

0 = as good as it could be      5 = as bad as it could be

Sense of well-being: 0 1 2 3 4 5 6

What word or phrase would best describe your overall sense of well-being right now

### :Well Being Indicator:

Print Help

Tuesday  
January 6, 2009



CLIENT DATA		CASE NOTES		RESEARCH		VAS RESEARCH		WELL-BEING RESEARCH		COMPLAINTS RESEARCH		REPORTS												
Name		Miranda Castro		DOB		Jun 7, 1951		Parents				ID 1622												
Date of Visit		A word or phrase to describe the sense of well being										0		1	2	3	4	5	6	7	8	9		
Sep 17, 2003		Miserable, migraines, constipation, depressed and utterly depleted										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Clear
Oct 8, 2003		Some improvements, feeling stronger in self										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Clear
Nov 14, 2003		beginning to feel better										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Dec 28, 2003		Better still										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Jul 16, 2005		Did well till summer, bad stressors, relapsing but not as bad as at first										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Clear
Aug 24, 2005		Beginning to improve										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Jan 27, 2006		Did great for most of last year - some minor symptoms										<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Clear
Jul 6, 2006												<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Clear
Nov 2, 2008		Much better overall										<input type="radio"/>		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear

Web Links > > >

[Official MYMOPS Website](#)

[Homeopathic Research Institute](#)



## :Research Help—Visual Analog Scale:



This scale has a proven track record with evaluating patients - especially in emergency settings with regard to pain assessment. Researchers of CAM therapies are using it to measure a variety of outcomes including, pain, and general and specific responses to treatment/s.

This 10 cm line is a remarkably accurate measure of where a person instinctively feels they are 'at'. It's gloriously simple - it's easy to administer and quick for patients to use, as well as quick and easy to input the data. Please the line against a rule and make a note of the number/s then click at the correct measurement for that appointment date on that patient's VAS chart.

If you decide to measure something more specific that their sense of how they are doing overall make sure you 'clear' any other checked data first. If you want to save a patient's VAS records before you click that clear button then take a screen shot and paste that graphic into that patient's Store Docs.

A Visual Analogue Scale (VAS) is a measurement instrument that seeks to measure something (a characteristic or an attitude) that cannot easily be directly measured.

For example, the amount of pain that a patient feels ranges across a continuum from none to an extreme amount of pain. It was to capture this idea of an underlying continuum that the VAS was devised. Such an assessment is clearly highly subjective, and so these scales are of most value when looking at change within individuals, and are of less value for comparing across a group of individuals at one time point.

Further reading Wewers M.E. & Lowe N.K. (1990) A critical review of visual analogue scales in the measurement of clinical phenomena. Research in Nursing and Health 13, 227±236.

### VAS: Visual Analog Scale

Looking at the line below where would you say you fall in terms of how you feel overall or since your last homeopathic visit.

Place a vertical mark on the line that best describes where or how you feel right now.

Don't 'think' too hard or long about this.

0 = the best you could be

10 = the worst you could be

0 \_\_\_\_\_ 10

**:Visual Analog Scale:** Print Help Tuesday January 6, 2009

**CLIENT DATA** **CASE NOTES** **RESEARCH** **VAS RESEARCH** **WELL-BEING RESEARCH** **COMPLAINTS RESEARCH** **REPORTS**

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Parents: \_\_\_\_\_ ID: 1622

Date of Visit	0	.5	1	1.5	2	2.5	3	3.5	4	4.5	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10		
Sep 17, 2003	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Oct 8, 2003	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Nov 14, 2003	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Dec 28, 2003	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Jul 16, 2005	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Aug 24, 2005	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Jan 27, 2006	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Jul 6, 2006	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear
Nov 2, 2008	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clear



## :Settings Help—Client Data:



There are instructions at each Settings screen to help you understand what you need to do and how to do it. Most of these are straightforward. There's some extra help in this help manual and also some at the individual help pages i.e. Calendar and Emails etc.

Address Book Business Card Calendar **Client Data** Email Envelopes Inventory Invoices Labels Letters Menus Pharmacy

Take a little time to scroll through each Settings screen familiarizing yourself with the kinds of customizations available at each one.

Come back and play with the ones that seem easy or fun - or important to your practice. If you want to be able to send out mailing shots for example, then go through the Email, Envelopes, Labels and Letters settings and get them all set up correctly.

If you have the time then go through each of these screens one at a time and get yourself thoroughly set up in one sitting!

### :Client Data Settings:

Print Help

Monday  
December 29, 2008

#### CLIENT DATA

Address Book Business Card Calendar **Client Data** Email Envelopes Inventory Invoices Labels Letters Menus Pharmacy

#### Select View

☐ Basic ☒ Advanced

Are you newish to computers? Do you find technology confusing? Check Basic.  
Are you computer and database savvy? High tech? Check Advanced.

#### Client Categories

Client Category 1	General Clients
Client Category 2	Boca Raton
Client Category 3	Gainesville/Deland
Client Category 4	Phone
Client Category 5	Students
Client Category 6	Inquiry
Client Category 7	Tampa

#### Audit Categories

Audit Category 1	New Client
Audit Category 2	Similimum
Audit Category 3	Similar/s
Audit Category 4	Doing Well
Audit Category 5	Variable
Audit Category 6	No Response
Audit Category 7	No feedback

#### Forms on File

Form 1	HBF
Form 2	Gen. Consent
Form 3	Release: Consult
Form 4	Release: Teach
Form 5	Release: Publish
Form 6	Other

Client Data is where you enter your own client categories

These are your main practices or businesses. You may also wish to have a 'general client' category for non-patients who pay you for services (like teaching or supervising) or products (like clinics).

You can also customize the kinds of patient forms you keep on file.

You can change Audit Categories 2 through 6 if you wish. Click in any of the white fields and type away.

You can change the weight, height and temperature headers depending on which 'system' you use (pounds/kilos, feet/meters, Fahrenheit/Celsius).

Measurements: Weight: lbs Height: ft-in Temp: F CASE DETAILS

Patient Summary Footer:

Customizable footer shows on each page (center bottom) of printed case notes.

The Patient Summary footer is for if you have to print anything special (legal) on each page of your clients' case notes.

#### Changes

You can change any customizable fields at any time. It's not a good idea to keep doing so especially with Client Categories. COMPASS will NOT remember former categories. If you wish to do this then search for all clients in a soon to be defunct category and add a relevant note in the Miscellaneous Notes field at the Client Data screen with 'today's' date so that after the category changes you can see from the note in each client's 'file' which category they belonged to.



## :Settings Help—Address Book:



There are 8 fields in the Address Book that are fully customizable.

The first 6 fields are good for recording important information such as account numbers and passwords, frequent flyer numbers, online logins and pin numbers, serial and membership numbers - i.e. anything that you have to look up and also, anything that you have to keep very, very safe.

### Tips

Set up one email address only for online accounts and purchases etc. This will keep your main email account nice and clear - and virus free. You can easily set up a free account - there are many companies offering this. Just google 'free email address'.

Find Important Numbers to view a list of just those companies or contacts that you have important information for. Print out this list from time to time and keep it in a safe at your home - or the bank. You'll be glad you did if ever you need it.

You can use these last 2 fields and the check box (Misc Info and Change Address) are fully customizable also. Use them to check off notification like change of address or wedding invitations etc.!

Clicking the clear button will remove the check from ALL checked boxes in your address book - be sure that's what you want to do when you click it - you are of course given a chance to cancel it.



## :Settings Help—Communications:



You'll need to get set up at each of these Settings screens in order to send out any communications i.e. to send out letters or emails, and to print out labels or envelopes.

Address Book Business Card Calendar Client Data **Email** **Envelopes** Inventory Invoices **Labels** **Letters** Menus Pharmacy

Emails Settings: Go to the **Emails - Get Set Up** page in this Help Manual for instructions.

Envelopes Settings: Go to the **Envelopes** page in this Help Manual for instructions.

Labels Settings: Go to the **Labels** page in this Help Manual for instructions.

Getting set up with Letters Settings:

Go to the Letters Settings screen and select your default paper size and printer.

**:Letters Settings:** Print Help Tuesday December 30, 2008

CLIENT DATA **LETTERS** MASS MAILING ADDRESS BOOK

Address Book Business Card Calendar Client Data Email Envelopes Inventory Invoices Labels **Letters** Menus Pharmacy

**PAGE & PRINTER SETUP** ☒ Letter ☐ A4 Select Printer

Select Letter or A4 and then Click on the Select Printer button to make the correct printer and paper selections.

**PAPER SIZES**

Euro A4	8.27" x 11.69" ... 210 mm x 297
US Letter	8.5" x 11" ... 21.59 cm x 27.94 cm
US Legal	8.5" x 14" ... 21.59 cm x 35.55 cm

Select **EITHER** text **OR** logo option for letterheads and/or footers to be placed on **ALL** your letters & invoices etc.

**HEADER & FOOTER TEXT OPTION**

Use the Format menu to select fonts, sizes and color of fonts as well as other styles to create headers and/or footers for all letters & invoices. Delete all data if you have your own headed paper.

**HEADER for letters, invoices & statements: TEXT Option - type in your own details**

**FOOTER for letters, invoices & statements: TEXT Option - type in your own details**

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Certified with The Council on Homeopathic Certification, 1189 Divisadero Street, San Francisco, CA 94114, USA  
Registered with and Fellow of The Society of Homeopaths, 2 Avenue Road, Northampton, NN1 4AU, UK

**HEADER & FOOTER LOGO OPTION**

Paste your logo into these fields or Insert a .jpg, .tiff or graphic file from your hard drive.

Header size: 7.25 x .9 inch / 18.4 x 2.25 cm  
Footer size: 7.25 x 1.5 inch / 18.4 x 3.8 cm

**HEADER for letters, invoices & statements: LOGO Option - insert your own 'picture'** Insert

**FOOTER for letters, invoices & statements: LOGO Option - insert your own 'picture'** Insert

MIRANDA CASTRO  
HOMEOPATHIC CONSULTANT

Then create a header and/or a footer for your letters - as you see from the example below you can 'mix and match' i.e. insert a logo for the header and then format a typed footer.

If you have your own letterheads you'll want to make sure all four fields (the 2 headers and the 2 footers) are completely empty.



## :Settings Help—Miscellaneous:



Business Card settings: Go to the **Business Card** page in this Manual for instructions.

Address Book Business Card Calendar Client Data Email Envelopes Inventory Invoices Labels Letters Menus Pharmacy

Getting set up with Invoices Settings: Go to the Invoices Settings screen and select your tax (or VAT) rate. You can only select one tax rate in COMPASS. Any taxable services or goods are then automatically charged taxes at this rate.

If you work in two or more states or provinces each with different tax rates you will have to change the tax rate on individual invoices (in the header to the tax field above the totals).

### :Invoice Settings:

Print Help

Tuesday  
December 30, 2008

CLIENT DATA INVOICE DATA ENTRY INS BILLING INVOICE

Select Printer Check correct printer has been selected

Address Book Business Card Calendar Client Data Email Envelopes Inventory Invoices Labels Letters Menus Pharmacy

TAX/VAT RATE 6.255 % Changes in tax/vat rate will only apply to new invoices.

Tax/License #s

Tax ID #

Tax ID Number: 097-52-4902

License #

License Number: 900006597

State

Oregon

License Note

Family Nurse Practitioner with Prescriptive Authority

The Tax ID and License Numbers mostly apply to practitioners who wish to submit invoices to insurance companies. This part of COMPASS under construction. We need feedback about whether this would be important to you - and whether you are able to assist us with it. Please get in touch with Miranda or Jim if you can help us with this.

These messages will appear on all your invoices. You can remove them if you would prefer there to be nothing - or replace them with something of your own. You can write longer 'quotes' but you will then need to change the font size and print out an invoice to check it looks good.

Invoice Message	Good health is priceless	This message appears on your client's invoices - use it to say thank you or to write a brief generic message.
Balance Due Message	Amount Due:	
Invoice Paid Message	Paid in full. Thank you.	

The Balance Due and Invoice Paid Messages are also customizable - make sure they are short i.e. that they fit within the field.



# :Settings Help—Remedies/Pharmacy:



Inventory settings: Go to the **Inventory** page in this Manual for instructions.

Address Book Business Card Calendar Client Data Email Envelopes **Inventory** Invoices Labels Letters Menus **Pharmacy**

Pharmacy Settings is where you can keep a 'homeopathic pharmacy' list. It is always in the right place - at the Remedy Details screen - for when you need it. You can refer to it when instructing a patient which remedy to take and where they can buy it if need be.

## Pharmacy Settings:

Client Data Remedy Details

Address Book Business Card Calendar Client Data Email Envelopes **Inventory** Invoices Labels Letters Menus **Pharmacy**

**Pharmacy Details**

COMPASS PHARMACY, Pharm - 1.800.385.7646/395.475.7576  
http://ahompharm.com/  
info@ahompharm.com 888-427-6432 info@ahompharm.com  
Homeopathy Overnight: 816-498624 35 - www.homeopathyovernight.com (800) 275-4233  
Natural Health Supply: 888-689-1498 - www.23homeopathy.com  
Remedy Source: 877.825.2159 remedysource.com  
Washington Homeopathic Products: 800-696-3495 www.homeopathyworks.com  
Helen's Homeopathic Pharmacy - UK:  
011 44 2892 536353 (toll free) 01852 537254 (live person)  
Email: order@helen.co.uk  
Website: www.helen.co.uk  
Apothecary UK

Customize these boxes and the headers to create templates about remedy recommendations and instructions etc.

This information will show at every prescription.

Use this first box (to the left) to keep pharmacy contact details to hand so you don't have to look them up.

Use the other 10 boxes for instructions and/or FAQs.  
You can use mine as a starting point or delete and replace with your own.  
Come back here to edit the information.

Click the copy button here to copy the information in that field to your clipboard.

Click the copy button at the Remedy Details screen to automatically copy the information to the Client Instruction field and Letter where you can edit/format it to fit that particular client/prescription. It is copied at the same time to your clipboard in case you wish to paste it into another program or email etc.

Feel free to delete the list that ships with COMPASS and insert your own local/favorite pharmacies.

**1 Adult Day Dose:** **Copy**

Dear

I have a remedy for you - **Calc. carb.** (Calc.) 200C.  
You will be able to purchase it from **Homeopathy Overnight**: 888-427-6432 - [ahompharm.com](http://ahompharm.com)

Ignore the disease condition listed on the label - it's a legal requirement and may have nothing to do with your symptoms.

Take two doses, together: one at bedtime and one the following morning. Only two doses. Do NOT take any more doses i.e. do not take it twice daily.

One dose - 4-6 pills (see additional directions below).

Please get in touch with me by email or phone about 4 weeks after you have taken it for a half hour follow up appointment. If you have had no response whatsoever 2 weeks after you take it please let me know.

PLEASE keep notes of any responses - and the dates they occur. Your information will help me plan the next step!

Many thanks and best wishes  
Miranda

**2 Adult Night (Test) Dose:** **Copy**

Dear

Your remedy:  
You'll be able to purchase it from:  
State of bottle:

Please take a TEST dose as follows:

- Tap one dose into 4 ounces of water.
- Stir vigorously - the pills/particles should be completely dissolved.
- Take one teaspoon (approx 5-6 drops) for 3 doses only. Do not use the remedy more than 3 times in 24 hours. DO NOT take it every day!
- Stir vigorously before each dose.
- Hold the liquid in your mouth for a few seconds before swallowing.
- Throat the rest of the water away and put the glass/cup and spoon in the dishwasher so the next person to use them doesn't get an inadvertent dose of the remedy!

One dose - one tablet or 2-3 pills/particles (small round ones) or 5 - 10 of the tiny granules (enough to cover the bottom of the lid).

Please keep notes of anything unusual or different that happens between appointments, along with the dates, as this information is necessary to me and will enable me to treat your progress more effectively. I am especially interested in any changes in energy, mood, appetite, any significant dreams, and, of course, any changes in your symptoms.

Please get in touch in 2 weeks time to let me know how you are doing.

With best wishes  
Miranda

**3 Adult Lids:** **Copy**

Dear

Your remedy:  
You'll be able to purchase it from:  
State of bottle:

To start with take a SINGLE (TEST) DOSE

2. Shake the bottle 10 times (using the bottom of it on to the palm of your hand or a wooden surface) - i.e. shake it to dissolve it then use it with a good 'tap' but dose

**4 Childs Dose:** **Copy**

Dear Miranda

I have a remedy for Derryl.

Remedy: **Calc. carb.** 200C.  
You'll be able to purchase it from **Natural Health Supply** NHT: 888-689-1498 (ask for a half dram bottle)

Ignore the disease condition listed on the label - it's a legal requirement and may have nothing to do with your child's symptoms.

There are ten fields for instructions for clients regarding remedies. COMPASS ships with a Miranda Castro's basic, frequently-needed instructions. Feel free to use these if you would like or to delete them and replace them with your own.

The headers are all customizable.

Using these will save you an astonishing amount of time. Taking the time to set them up with never, ever be wasted!



# :Tasks Help:



Tasks is everything you need to do that is NOT associated with your patients i.e. all non-client related action items, projects, tasks or whatever you want to call them for friends, relatives, businesses and companies etc.

You can leave all the tasks for a contact or delete them as you complete them. They are handy for keeping records - just like in the old days of paper files. You can keep track of conversations with people, things you said you'd do or send or whatever, emails that have useful information that you want to keep just in case and so on. Create a separate contact for each software company you purchase from and the dates of the original purchases, as well as the dates of upgrades and information about any tech support issues.

You can create one contact for all air miles accounts, one for referrals (people I refer to) and one for shopping! I write down anything I think I want and then I get on with my life. 9 times out of 10 I don't think about it again and 6 months down the road I'm astonished that I even thought of buying it!

Click on the Tasks tab in the Address Book to view a list of all the things you need to do - of all your current tasks.

**:Task List:** Show All Find Print Help Monday December 29, 2008 COMPASS

**CLIENT DATA** **ADDRESS BOOK** **TASKS LIST** **TASKS EXPANDED** **INDIVIDUAL TASK** Find All Current Tasks Find All Completed Tasks

	Date	Name	Company	Task	Task Note	Category	Priority	Due Date	Completed
View	3 Mar. 08	Jim Hoyt	COMPASS	Another Task	Whatever	General	5 - N/A		<input type="checkbox"/>
View	1 Jan. 08	Heather Knox		Write	New Patient Template	Practice	2 - ASAP		<input type="checkbox"/>
View	5 May. 07		Simply Digi		Research LMS				<input type="checkbox"/>
View	5 May. 07	nitin Jain	B. Jain Group of	Follow Up On	Publication of Stress				<input type="checkbox"/>
View	6 Jun. 08	Saana & Laurel	Pet Sitter		Subject: pet sitting				<input type="checkbox"/>
View	6 Jun. 08	melissa burch	Inner Health		Affiliate Program				<input type="checkbox"/>
View	6 Jun. 08		COMPASS		important data				<input type="checkbox"/>
View	7 Jul. 08		Smart FTP		Upgrade details				<input type="checkbox"/>
View	7 Jul. 08		ALCS - Authors		Dear ALCS				<input type="checkbox"/>
View	8 Aug. 08		Expedis		Clifton Hotels Complaint				<input type="checkbox"/>
View	8 Aug. 08		Bank of America		Priority # Information				<input type="checkbox"/>
View	8 Aug. 08	Daniel Welby			Wedding Plans				<input type="checkbox"/>
View	9 Sep. 08		National Center for		Chat Room Instructions				<input type="checkbox"/>
View	9 Sep. 08		IDrive		Partnership Details				<input type="checkbox"/>
View	9 Sep. 08		FileMaker		Upgrade details				<input type="checkbox"/>
View	9 Sep. 08		Hahnemann Labs		Ordering Information				<input type="checkbox"/>
View	9 Sep. 08	Mary Clarke	Homeopathy Action		Mary's Retirement Email				<input type="checkbox"/>
View	9 Sep. 08	Jo Toiss			09: Toronto Conference				<input type="checkbox"/>
View	6 Jun. 08		Lockton Malpractice		Renewal				<input type="checkbox"/>
View	10 Oct. 08		NetWest Bank		0W - Monthly \$\$\$				<input type="checkbox"/>
View	10 Oct. 08	Kate Chatfield	University of Lancaster		Assignment Details				<input type="checkbox"/>
View	11 Nov. 08	Nirav	Crash Technicians (Tech		Thunderbird Notes				<input type="checkbox"/>
View	12 Dec. 08		KHA		Beta test report - nov 08				<input type="checkbox"/>
View	12 Dec. 08	Judith Thompson	The Red Tent		Contact re: room				<input type="checkbox"/>
View	12 Dec. 08	Kent	St Francis House		Donation Details				<input type="checkbox"/>
View	12 Dec. 08		Fedex		International Priority				<input type="checkbox"/>
View	12 Dec. 08	Arupa Chiarini			12/22/08 - 40 blankets				<input type="checkbox"/>
View	12 Dec. 08		Triodos Bank		Q re: interest				<input type="checkbox"/>
View	12 Dec. 08		Hair Colors		light mountain dyes ....				<input type="checkbox"/>
View	12 Dec. 08		HP Computers		IKEA				<input type="checkbox"/>

You can use these fields any way you would like. You will want to leave the date, name and company name as is.

Write something brief in the Task and Task Note fields that reminds you what needs to be done.

You can assign a category, a priority and a due date - or not if those are not important.

Check off tasks (click the **Completed** box) for them to be removed from this list.



## :Tasks Help—More:



NEW Task	Task	Task Note	Category	Priority	Due Date	Completed
View	12/9/2008 Call Jim	Set up Meeting	Business	2 - ASAP		
View	3/4/2008 Another Task	Whatever	General	5 - N/A		

A list of all the tasks associated with a contact can be found at the bottom of the main Address Book screen. Click on **View** to go to that task. Click **New Task** to add one with today's date automatically inserted.

Use the tab key to jump from one field to the next and type in any relevant details

Print Edit Menus Help

ADDRESS LIST CATEGORY LIST TASKS CHECK

View/Print

Task Type

Task Category

Click the Edit Menus button at the top of the main Address Book screen to add, edit or change the items in the task type and category menus.

Select categories for Tasks (Projects) linked to contacts in your Address Book here.

You can view the tasks in 3 ways - as a simple list (Tasks List), a bigger list with a bit more information visible (Expanded List) or each task taking the whole screen - with lots of room for the main note as well as an additional notes field.

Use these fields for thoughts, information, the important portions of emails etc.

Make sure you date absolutely EVERYTHING - use the Insert Menu (and select date) or Right Click then select Insert and then date or use Ctrl/Cmd and -

:Tasks—Individual: Show All Find Print Help Monday December 29, 2008

CLIENT DATA ADDRESS BOOK TASKS LIST EXPANDED LIST INDIVIDUAL TASK

Address ID: 7511

Date	Name	Category	Task	Task Note	Category	Priority	Due Date	Completed
12/9/2008	Kent	St Francis House	Donation Details					

**Task Note**

Donation Details

12/9/2008

spoke to Kent and offered to match each \$50 donated for the first 10 donations to raise \$1000 for a dryer for St Francis House. Apparently they have a dryer (?? see below) A/C from Kent re: what St Francis needs and the cost so I can organize a specific informal fund-raiser and raise the full money from amongst our friends.

See correspondence between Taylor and Arupa re donations to the homeless ++

Alyea: Taylor wrote:

> St. Francis House's Kent Vann would be the one to call to see if that particular donation of a dryer would be helpful. Drop my name...we have a mutual admiration society going. He will also be able to tell you what other items they could use at this time. John DeCarmin works out of the Alachua County Housing Authority at the beautiful D'Acosta House <http://www.alachuafl.com/index.htm>. That's a good spot to drop off blankets as is Arupa's porch (facing Mary and Jackie's House...their next door neighbor on the left). I give Arupa all sorts of stuff, so does our program. She's a weird wonderful angel, though she's getting a bit burnt out it seems.

> PS I'll respond to the singing email when I get home...ITS VERY GOOD TO HEAR FROM YOU!

> Please note new address, phone, and fax numbers:

> Taylor J. Alyea, MSW, VSN S

> Health Care for Re-entry Veteran Specialist

> 1002 NW 23rd Ave., Gainesville, FL 32609

> Ph: (352) 379-4935 Fax: (352) 379-2748

> From: Miranda Castro [mailto:mirandacastro@cox.net]

> Sent: Monday, December 08, 2008 3:46 PM

> To: Taylor J. Alyea; Alyea, Taylor

> Subject: Re: Home Van (from Wild Iris)

>

> can you follow the thread here taylor?

**Additional Notes**

12/29/2008

Donated 40 wool blankets (from Northwest Mills) to arupa instead because I never heard back from Kent and the original order of blankets via RRD didn't register .... the blankets from northwest woolen mills arrived today

12/22/08 - 40 blankets

# 1025 ordered @ \$7.95 ... 70% wool/30% synthetic = \$318

<http://www.northwestwoolen.com/relief.htm>

12/22/08

Thanks for your inquiry and helping others.

I can offer the following:

Humanitarian Blankets #5309

50 blankets (30% wool/70% synthetic)

\$5.95 each, delivered by UPS ground to Florida

We accept Visa and MC

Regards,

Paulette Butler

Northwest Woolen Mills

235 Singleton St.

Woonsocket, RI 02895

800-848-9665 x 121

[www.northwestwoolen.com](http://www.northwestwoolen.com)

see Arupa for full details



# :To Do List Help:



A homeopathic practice involves a tremendous number of administrative tasks, some mundane - all essential. Using this feature will improve your efficiency tremendously and help you relax about what's yet to be done and when!

At the Client Data screen use this feature to keep track of all your client related tasks.

Click the **New Action** button and 'today's' date automatically enters in the date field. Select a Priority and the Action Item list pops down, Select one and you find yourself in the Action Note field.

If you are super busy you can skip the date and the priority and just select an action from the pop down list.

Click on the **To Dos** tab to view a list of all current Action Items (sorted by date).

Click the pink headers to re-sort the list by urgency or type. Check this list 2 or 3 times a day or print it out at the beginning of your day to be sure not to let any important or urgent tasks fall through the cracks.

**:To Do List:** Find Print List Help Friday July 23, 2010 COMPAS

CLIENT DATA TRACKER **TO DO LIST** < LISTS Find All Action Items Find All Birthdays

	First Name	Last Name	Home	Work	Cell	Date	Priority	Action	Action Note
View	Elizabeth	First		020 7766 7304		Jul 15, 2010	2 - ASAP	Analyze Case	Send receipt
View	Randini	Castro	954 532 3636	954 564 1106	954 547 4633	Jul 14, 2010	1 - Urgent	Email NPL	Send cc to Mother
View	Ian	Aldridge			954 588 7219	Jul 23, 2010	2 - ASAP	Email NPL	
View	Isaac	Aldridge				Jul 23, 2010	2 - ASAP	Email NPL	
View	Nick	Angelo	020 7431 2063	+44 162 854 6664	123 456 7890	Jul 1, 2010	3 - None	Send Birthday Card	to new baby

Keep track of the many everyday client-related tasks including:

- returning calls or emails
- sending invoices
- analyzing or reassessing cases
- sending out remedies, birthday cards or other information

Customize the drop down menus by selecting Edit Menus button at the top of the Client Data screen.

Use the Action Note field (either here or at the Client Data screen to add any additional words about what needs to be done and when.

Delete any data in each of a client's action fields by clicking on the red **Clear** button. The list will automatically update itself.

**Find all Birthdays** takes you to a list of every single client with a birthday and sorts it by month. You can scroll to the upcoming month to see whose birthdays are up and coming.







## :Treatment Summary Help:



Treatment Summary screen is the second most frequented screen in COMPASS (Client Data is the most used screen) so be sure to familiarize yourself with it.

Come here in order to:

- View a list of case notes (appointments/visits/consults) or remedies (prescriptions) for a client
- Create **NEW Case Notes** (appointments/visits/consults) or **NEW Remedies** (prescriptions)
- **View** a specific appointment or prescription.
- **Start**, **Pause** or **Stop** the appointment timer. (See Appointment Timer Help - at right)

**:Treatment Summary:** Find Print Edit Menu Help Wednesday December 10, 2008

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS LETTERS SUMMARY INVOICE SUMMARY APPT/RX SUMMARY Forms

Name Elizabeth First DOB Feb 8, 1958 45 Click Start Appointment Timer Clear  
Parents Henry & Anne Windsor ID 1 Start Stop Resume Stop Total  
Company

**CASE NOTES SUMMARY** NEW Case Note NEW Note incl. Client's Previous Complaints

	Date	Type of Appointment	Time	Response	Presenting Complaints	
View	Jan 10, 2006	Client Notes	1.5	N/A	Alopecia Infertility	
View	Jan 10, 2006	First Appointment: Office	1	N/A	Acne Addiction Anemia	

**REMEDY DETAILS SUMMARY** NEW Remedy Remedy List: View/Change/Add

	Date	Remedy	Potency	Dose	Repeated	Dose/Day/Form	Category	Conf.	Response	Aggravation	LofC	
View	Jan 10, 2006	Myos.	30C	Repeated	bid	6	3 Dry Chronic	93				

Click on the **Trash cans** to erase an appointment/visit or a prescription/remedy.

Remember all that deleted data can NEVER be retrieved. If you have two appointments or two remedies on the same date it is almost impossible to delete the correct one. Change the date first (in Case Notes), copy the data to a notepad just in case, then delete the appointment.



## :Treatment Summary Help—Case Notes:



Create a new consultation by clicking on the **New Case Note** button. You will be taken immediately (and automatically) to a new case note with today's date automatically inserted.

If this is not the first appointment then you can click the button to the right (**NEW Note incl. Client's Previous Complaints**) and you won't have to keep re-entering them - that's if they are still suffering from the same complaints.

The **Time** field is a drop down menu. Click in the box and you can select different time periods. Click on the **Edit Menus** button (at top of screen) to add your own time period options.

The **Type of Visit** field is a drop down menu. As a default you can select from the preset options or create your own by clicking on **Edit Menus** (at top of screen).

Be sure to fill out the **Presenting Complaints** fields, it will allow you to do interesting research on the composition of your practice in the future. COMPASS comes bundled with a list of complaints - click the **Edit Menus** button (at top of screen) to add or edit this list.

The client's name, ID#, DOB and age are automatically inserted from Client Data



## :Treatment Summary Help—Remedy Details:



Date	Remedy	Potency	Dose	Repeated	Dose/Day/Form	Category	Conf.	Response	Aggravation	LoFC
View Jan 10, 2006	Hyos.	30C	Repeated	bid	6 3	Dry Chronic	93			

Create (give) a new remedy to a client by clicking on the **New Remedy** button. You will be taken immediately (and automatically) to the **Remedy Details** screen - to a new (blank) prescription for this client with today's date automatically inserted.

**:Remedy Details:** Find Print Edit Menus Help Wednesday December 10, 2008

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS REMEDY AUDITS MATERIA MEDICA INVENTORY

Name Elizabeth First DOB Feb 8, 1558 45 Parents Henry & Anne Windsor ID 1

NEW Remedy Duplicate << First < Prev 2 of 2 Next > Last >> Remedy List: View/Change/Add

Date	Name	Potency	Dose	Repeated Dose	Doses Days	Form.	Category	Confidence
12/10/2008								

Remedy Form	Pharmacy	Repeated Dose 2	Repeated Dose 3	LHs	Bottle	Shakes	Drops	Spoon	Glass

Remedy Rationale		Remedy Response		Remedies Client has at Home	
1		Gen Response		ERK - 30C	
2		Aggravation		Ust 200 and 1M	
3		Law of Cure Sx	<input type="checkbox"/>	Calc p 6X	
4		Law of Cure Note			

ALL fields have drop down menus - you can use the **tab** key or the **enter** keys on your keyboard after each 'selection' to automatically jump to the next field. This makes 'data entry' for remedy details super quick and easy.

Click the **Edit Menus** button (at top of screen) to customize these menus to fit the way you work/prescribe.

Date	Remedy	Potency	Dose	Repeated	Dose/Day/Form	Category	Conf.	Response	Aggravation	LoFC
View Dec 10, 2008										
View Jan 10, 2006	Calc-ar. Calcarea arsenicosa				6 3	Dry Chronic	93			

You can also fill out the details at the Treatment Summary screen and fill out the basic details there. This is helpful - especially if you are in a hurry.





This help page is under construction.  
Please let us know if you'd like help with  
this feature.

[Click here to send an email to COMPASS Help](#)



# :Birthday Cards:



Right now there are THREE types of card that can be used for absolutely anything. Use them for a change of address mailing, a promotional mailing of any sort or a holiday greeting - as well as birthdays. These are perfect for small print runs and a great way to connect with clients.

1. **3-up Cards** ... there are no ready-made templates for these. Print them on card stock and take them to Kinkos for cutting afterwards. You can mail them with the address on the front (if confidentiality is not an issue) or send them in an envelope.

- ~ the front side has the client address and your return address
- ~ back 1 has room for a square graphic (150x150 pixels) and a personalized message
- ~ back 2 has room for a rectangular graphic (650x150 pixels) and a personalized message

2. **Postcards** ... print these on Avery stock and you can do it all at home. These are the easiest to print and send out (and probably the cheapest)

- ~ the front side has the client address and your return address
- ~ the back has room for a rectangular graphic (350x150 pixels) and a message which is not personalized (there's no greeting)

3. **Tent Cards** ... print these on Avery stock and send them (confidentially) in # 10 envelopes. Print labels for the envelopes - or print straight on to the envelopes. Print the labels IMMEDIATELY after printing the cards and keep the piles in order so that stuffing them is straightforward.

- ~ the front or outside has room for a rectangular graphic (550x150 pixels)
- ~ the inside has room for a personalized message.

This is a NEW feature and a work in progress. Your feedback will be enormously helpful. Don't be shy to tell us what doesn't work and/or how you'd like it to look etc.



To Nick  
Here's wishing you a  
healthy year full of  
happiness and spice  
Warm wishes  
Miranda



To Nick  
Here's wishing you a Happy & Healthful Birthday  
Best wishes  
from Miranda



**WE ARE MOVING!!!**  
We are writing to let you know that as of the 23rd of May we shall be located at our beautiful new offices at:  
1234 North End Avenue, Anywhere, ZZ 12345  
All other details remain the same:  
Phone: 111-222-1212 --- Web: [www.homeopathyoffices.com](http://www.homeopathyoffices.com)



To Nick  
Here's wishing you and your loved ones  
a happy and healthy holiday season  
Warm wishes  
The Homeopath!



# :Back Up! Back Up! Back Up!:



If I could say it 100 times and make you do it I would. If I could visit each and every one of you and shout it into the air around you I would. If I could be your back up fairy and wave a magic back up wand and make it happen I would. And this is why ...

The stories I hear about computers that are lost or stolen, or whose hard drives died unexpectedly (some on new or nearly new computers) is heartbreaking. It is always a time-consuming, costly nightmare. I learnt about backing up the hard way many years ago and was so very glad I had done so one bad morning last year. It was 7.30 and I accidentally killed my computer (don't ask). By 10 am I was at the office greeting my first patient - with a new computer loaded up with all my main software programs including COMPASS. I didn't lose any data and all thing considered not much time.

If you have a partial or a fully paperless office there's nothing more important than a daily back up. NOTHING! It is like brushing your teeth - it's a complete pain at first. You resist mightily but in the end you do it automatically and it's really, really worth it!

## **Back up to Your Computer**

**Pro:** It's easy, convenient and cheap.

**Cons:** In the event of loss or a theft you lose everything

## **Back up to a CDRom/DVD**

**Pros:** Low-ish cost (although over time the costs, especially of DVDs) mount up.

Re-writeable DVDs solves this problem but they are cost more and they can 'fail.'

**Cons:** You have to 'do it'. Most people don't - or they leave long gaps between back ups

Most people need multiple CDRoms or DVDs to back up their data.

DVDs and CDRoms can pile up over time and become their own filing nightmare.

## **Back up to an External Hard Drive or a Flash Drive**

**Pros:** It's pretty easy and convenient.

Even if you have to do it it's still easier/faster than CD-Roms/DVDs

**Cons:** You still have to do it.

External Hard Drives can malfunction or die

You may lose your computer and the hard drive or flash drive in a single fire, a hurricane or a bad theft.

## **Back up On Line**

**Pros:** It's easy and fast - and convenient. You can back up at the end of the day and set the back up program to shut down your computer when it's done.

You can schedule back ups at a certain time when you aren't at your computer  
i.e. you don't have to back it up in real time.

You back up 'off site'. In the event of a fire or theft or other computer failure you will not lose your second most precious asset. Your office files and records.

You don't waste any resources (DVDs, CD Roms etc.)

**Cons:** You need a high speed internet access.

Setting up and recovery involves a learning curve.

You have to check your settings from time to time to make sure the correct files - and that all your files - are getting backed up.

Backing up in real time uses a lot of your computer's 'memory.'

Get 2 gigabytes for free or 150 gb for \$49.50 a year!

[www.idrive.com](http://www.idrive.com)





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" They saved their files before closing and  
lived happily ever after. "



:Back Up! Back Up! Back Up!:



BACK UP

BACK UP

BACK UP

BACK UP

BACK UP

BACK UP

BACK UP

JUST DO IT

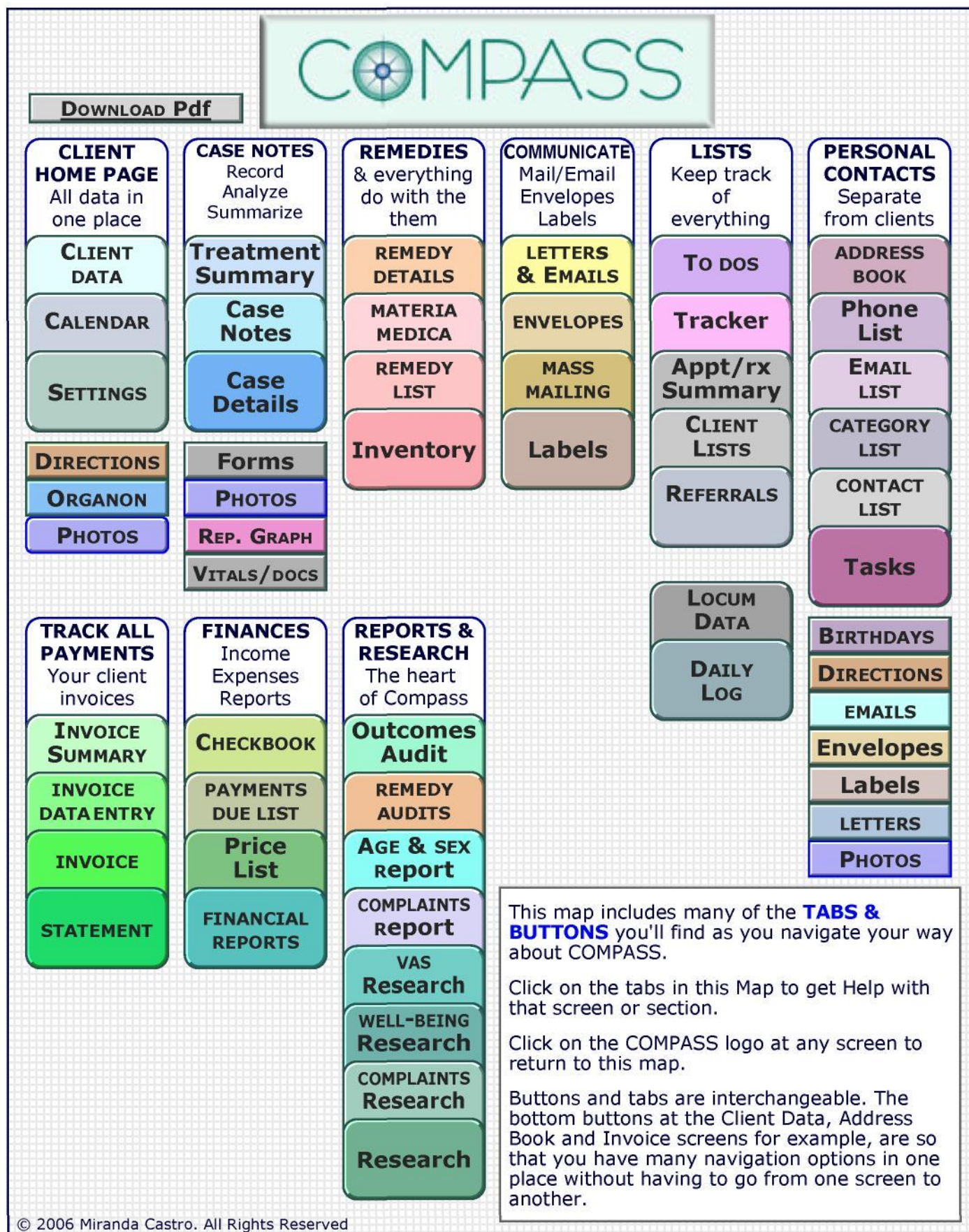
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[www.idrive.com](http://www.idrive.com)



## :A Map of the 'Tabs' in Compass:





## :Navigation:



The **Navigation Tabs** take you to different parts of Compass, to different parts of a client or contact's chart. They are color coded so that once you know your way about the program you'll find yourself clicking on the green tab go to invoices, and the blue one to jump to a client's case note. You'll know you are in remedies if the tabs are orange and so on.

You'll find the pale blue **Client Data tab on most layouts**. Think of the Client Data screen as your '**HOME PAGE**' - it holds the most important basic information about a client. You can **go almost anywhere from Client Data**. You can click on the Client Data tab in almost any layout to go home. It will always work whether you have any clients in the database or none!

The tabs change when you go to different sections as each section has increased options and also more tabs available to accommodate that section's various functions.

Some tabs will only work once A New Client has been created. For example:

A **New Case Note** has to be created before you can go to **Case Notes**

A **New Remedy** has to be created before you can go to **Remedy Details**

A **New Invoice** has to be created so you can go to a client's **Invoice or Statement**

You'll find these buttons on many screens:

NEW ...	Create a new client or visit/remedy/letter/invoice or a new contact/task etc			
Show All	Find	Print	Help	You'll find these at the top of most screens.
<<FIRST	< PREV	NEXT >	LAST >>	Toggle through a client's consults/invoices/letters etc
First	Click on the pink headers at the top of lists/reports to sort that group of clients			

### Notes About The Screens (windows)

It is not possible to have several COMPASS screens open at once. You can only look at one screen at a time. Use the tabs or buttons to navigate from one screen to another.

You cannot close a screen (window) to go from one place to another.

Use the tabs or buttons to navigate from one part of the program to another.

You cannot lose a client - your client's 'folder' will stay 'open' wherever you are - until you select another client. If you end up in a different client's chart please notify us which pathways you took when this happened and we'll fix it.

### Minimizing your screen works differently on each platform:

Windows - when clicking the orange minimize button the screen will revert to the size it was the last time you clicked that button.

Macintosh - when clicking the orange minimize button the screen will minimize i.e. it will close but the program will not close.

### Resizing your screens works differently on each platform:

Macintosh - grab the screen (bottom right hand corner) and resize.

Windows - click the minimize button first and then grab the screen and resize.

You may need to use the scroll bars to find that bottom right corner.

Don't close (quit) COMPASS to get to another program. Use the task bar (Win) or the dock (Mac) to jump to another open program or use the Alt/Cmd+tab keys.

Use the Quit button to close/exit COMPASS. You can back up your files to your computer's hard drive. It will take a long time if you have many clients. You don't need to back up with this method if you are backing up on line or to an external hard drive.



## :Printing:



There are print buttons at the top of most screens. These 'know' whether you are printing one or more portrait or landscape pages. Go to the Letters Settings screen and select the paper size and COMPASS will also then know your default letters size paper.

As with any other printing you will want to check the following before clicking the final Print or OK button:

**Print Records Being Browsed** for a mass mailing or a group of labels etc

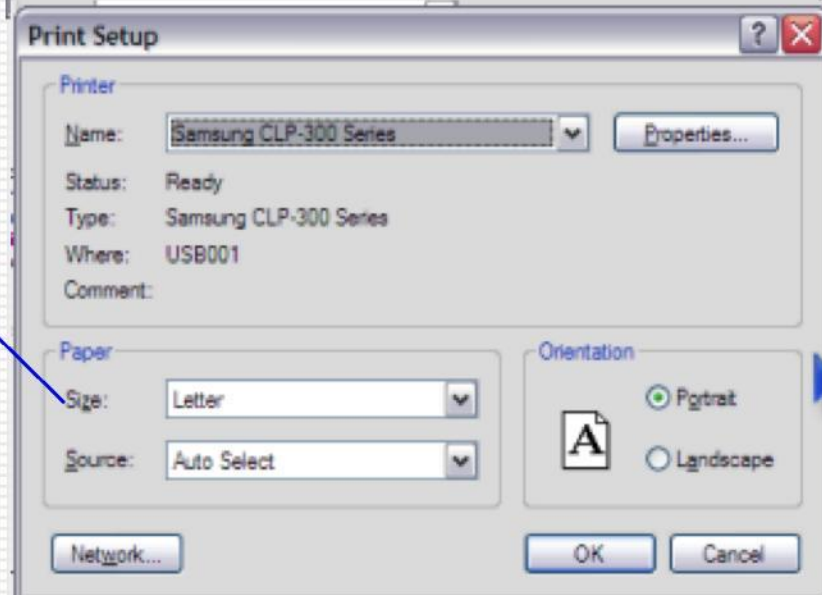
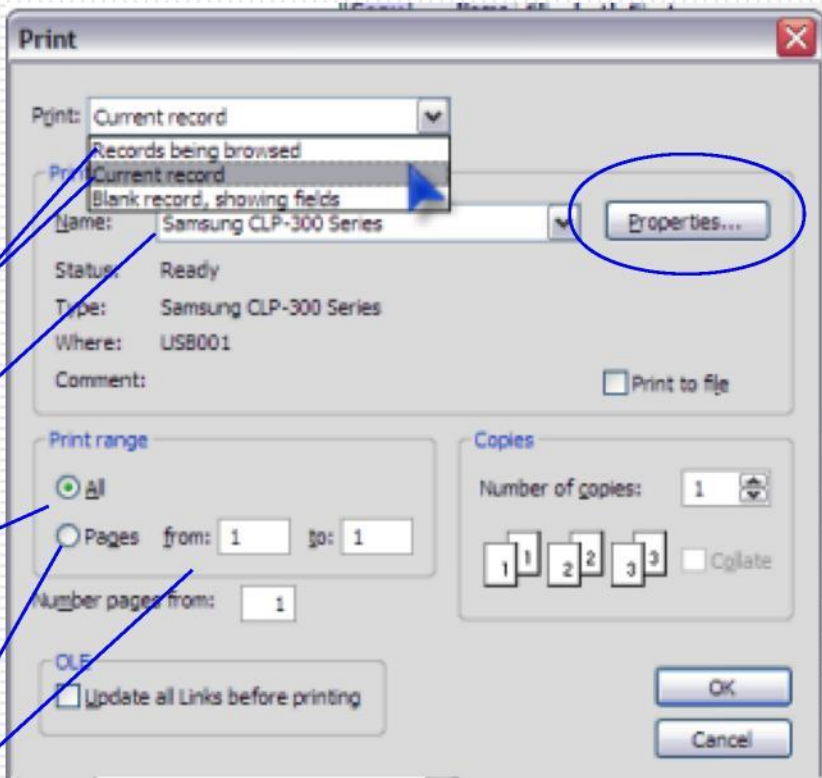
**Print Current Record** if you just want to print one letter or invoice etc.

**Double check the Printer** - especially if you typically use more than one

**Number of copies** - check this matches the print selection i.e. current record or records being browsed

**Print range** - 'all' when you are printing a case or '1 to 1' for a letter, invoice or envelope unless there are 2 pages to the document in which case '1 to 2'.

**Paper size** - double check this to avoid wasting paper (click Properties to do so)



**Current record** = just the one you are viewing.

**Records being browsed** = all selected (check rolodex in status area - see **Top 10 Tips**).

**Blank record, showing fields** = just prints an empty letter for example, with your logo.



## :Searching:



Click the yellow **Find** button at the top of most screens

Click into any field & type the first 2 or 3 letters of a name or city etc. In some cases a menu will appear and you can click to select or press the 'return' (enter) key to go to the next field. For example, to search for Sarah (first) and Smith (last).

Press Ctrl/Cmd+Enter to complete the search. Or click **Continue** in the status bar (top/far right)

If you are searching for a client and there's only one with that name you will stay at the Client Data screen. If there's more than one client with that name then you will be taken to a list where you can select the one you want.

Use **New Request** to add to a search to string 2 or more searches together.

Examples: Find clients from 2 (or more) states...Florida and Georgia. Click Find and enter FL into the state field then click Ctrl/Cmd+N (or **New Request**) and type GA into the same field then click Ctrl/Cmd+Enter (or **Continue** top right). There's no limit to the number of New Requests. Find all female clients in Florida by clicking Find and typing FL into the state field and selecting 'F' in the sex field. This limits your search to Florida females.

Restrict searches (exclude something/someone) with the **Omit** button.

Example: Find all clients who  
as;dlkjfdsa;jk  
a;dslkfjas;dkfj

Use **Operators** to for specialized searching.

Type ! into a field to find duplicates emails or addresses etc.).

Type \* to search for fields with any data in them. This is handy for data

Type = to find fields with no data - i.e. empty fields

Examples: Find all clients with emails by searching for \* in the email field. Find all clients without emails by searching = in the email field.

If you're unsure of the spelling type the first 1 or 2 letters of a name/email/city etc..

Find alternatives: Select Find in the View Menu OR Ctrl/Cmd+F.

Searching for emails: do not type the '@' sign - it is not recognized.



## :Structure—Basic:

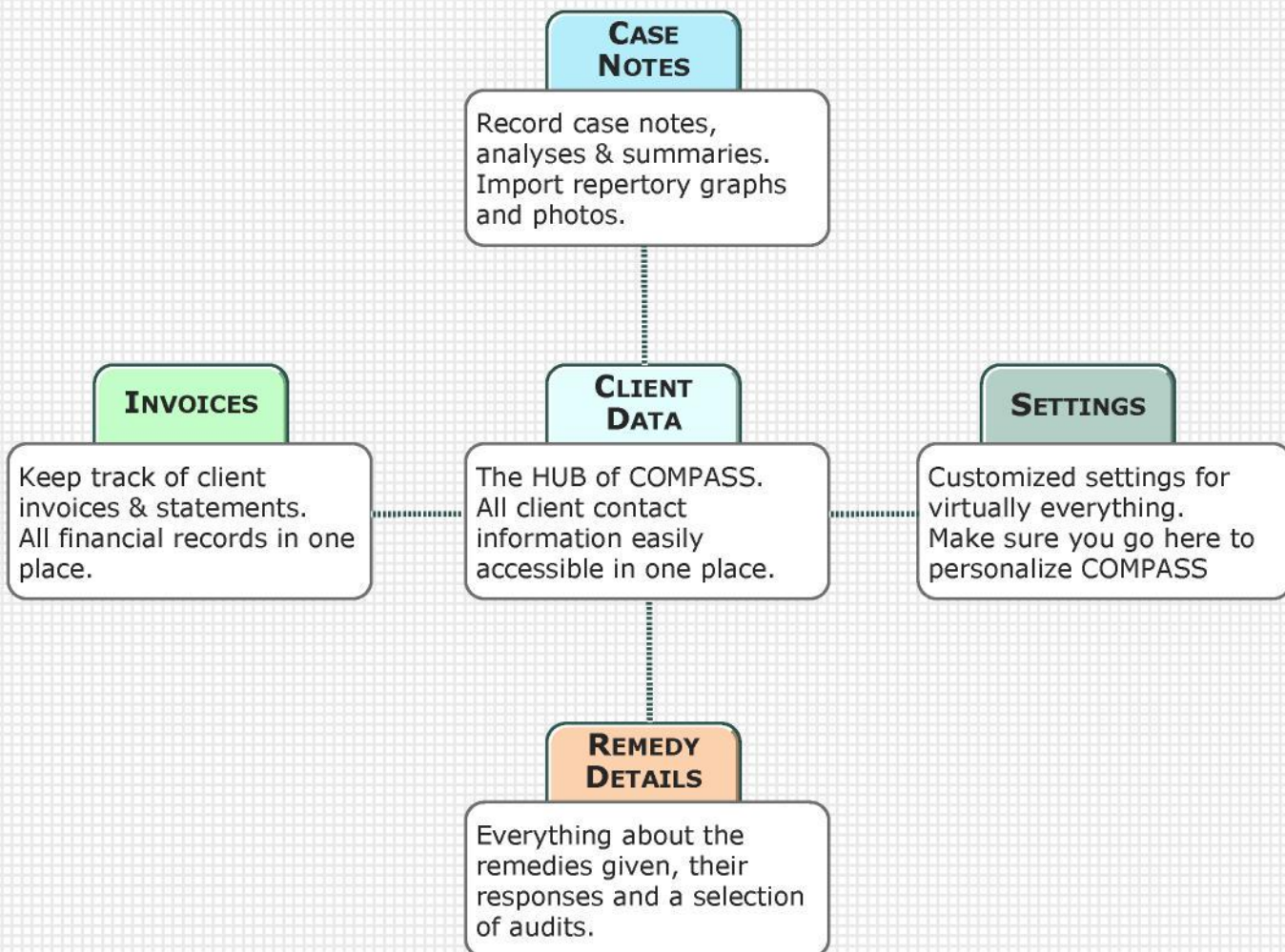


COMPASS's basic structure is fairly unique.

It's a 'database' software structure that has a more open format than most similar software programs. This gives you, the user, more control and more flexibility than most other database programs. It will work with you rather than forcing you to work within its strictures.

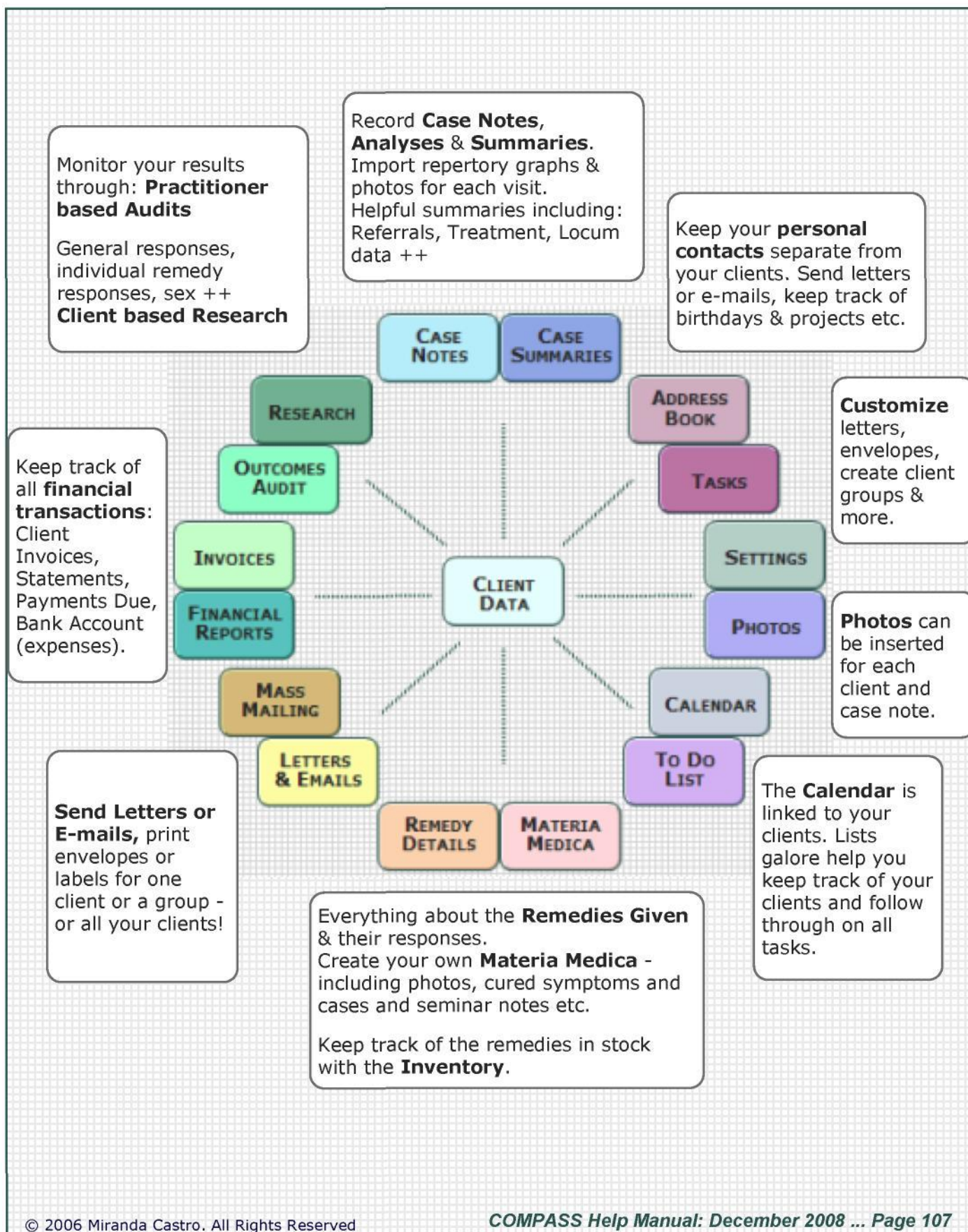
It is designed to work in part more like your real desktop i.e. to have lots of information readily visible just where you want it. This makes it look a bit busy in places but you'll soon come to appreciate the benefits.

COMPASS's color coding will make your working life easier and more pleasant. Working in grayscale, tiny hard to decipher icons and arial 8 pt (a database 'standard') for hours on end is bad for your eyes - and your soul.





## :Structure—Expanded:

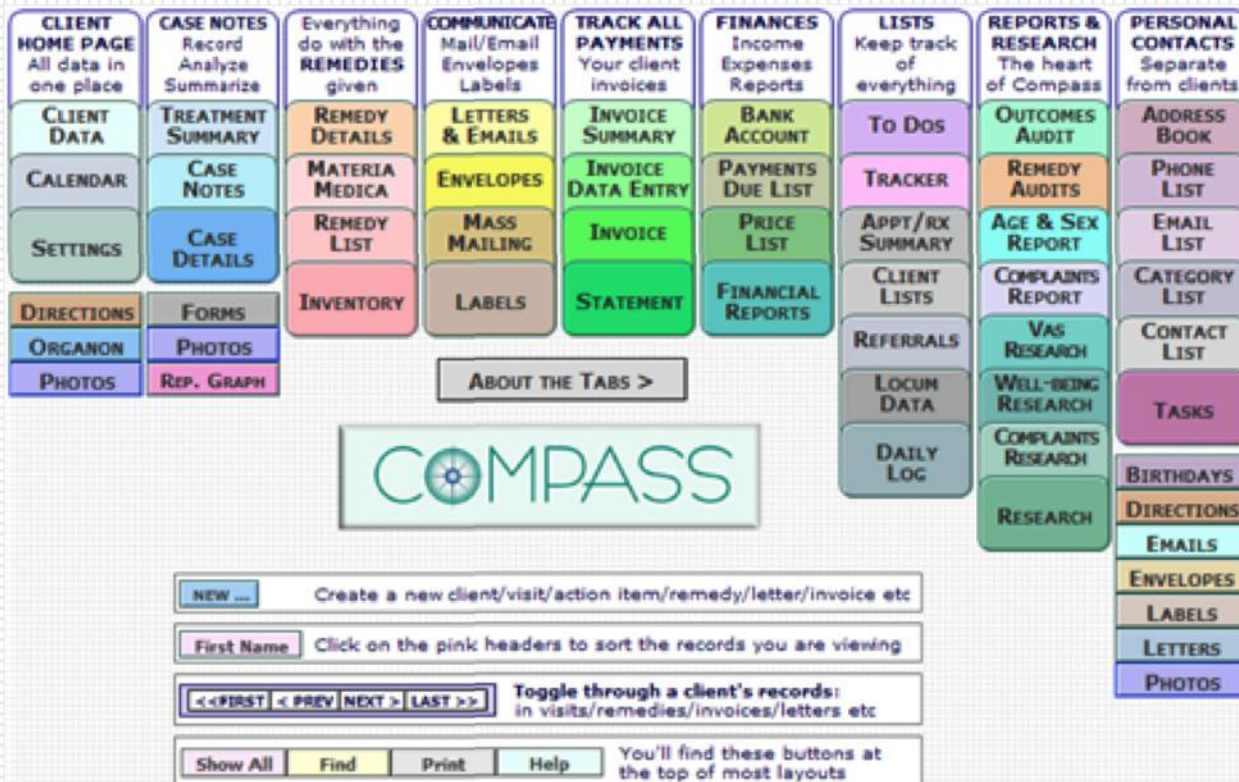




## :Structure—Full:



Click on the COMPASS logo on any screen to jump a map of all the 'tabs' in Compass. Click on any tab to get help with that part of the program.



### Roll Over Messages

Let your cursor linger for a second on any word or button that is underlined for an informative or instructional message (like the one above!)

The message will disappear after 10 seconds.

Roll off the word and then back on to it for the message to reappear.



# :Compass Tips—Your Paperless Office:



At these pages of this manual you'll find the most important tips to help you use COMPASS better, easier, quicker.

## 1. One Click

A single click works everywhere - you never have to double click anywhere.

## 2. Action!



Your cursor turns into a hand when you roll over a tab or a button that can do something or take you somewhere.

## 3. Shortcut Keys

- Tab = jump to the next field
- Ctrl + Shift + B = Bold
- Ctrl + Shift + I = Italic
- Ctrl + Shift + U = Underline

## 4. Dates

Ctrl - (Ctrl + minus key) enters today's date in any field

## 5. COMPASS Saves

COMPASS automatically saves:  
- every 5 minutes.  
- when you click a tab or button or go to another field or screen

## 6. Right Click

Right click for additional options including: formatting (color and size etc), emboldening and highlighting text.

## 7. Handy Mountains

At the lower left of all screens are the Zoom Tools - handy mountains that are for zooming in or out on at any time. For example, some graphics in the help manual pages are a bit hard to read until you zoom in on them.



Click the large mountain to zoom in. The 100 changes to 150 and 200 as you zoom in and in. Click the small mountain icon to zoom back out again or click the numbers once to return to 100. The rectangular '**box**' shows or hides the 'Status Bar' (see next page - tip # 9). **Browse** changes to **Find** (when searching) or **Preview** (on the way to printing at some screens)

## 8. Spellcheck

You have to 'install' a dictionary for Spellcheck to work.

Go to the **Edit Menu** - scroll down to **Spelling** - across to Select **Dictionaries** and click on the dictionary of your choice. In the same box click on **New** - locate your COMPASS folder, open it and click **Create**. Your own Dictionary will be created.

Make sure "Use Main Dictionary and User Spelling Dictionary" is checked and click **OK**.

Once you have installed both dictionaries (including your own) right click on a word with red dots under it to get suggestions for correct spelling and if the word IS correct you can select 'learn' for that word to be added to your own dictionary. It will not appear as incorrect from thenceforth!

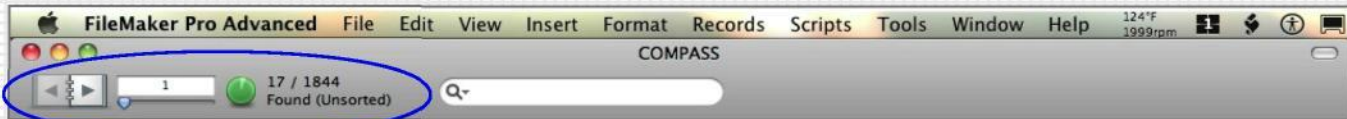


## :Compass Tips—Status Bar:



### 9. The Status Bar

The Status Bar at the top of your screen gives some basic information about the clients you are viewing - or the case notes or remedies etc.



You'll see the Rolodex everywhere you go in COMPASS.

If it is not visible click on the box (bottom left of your screen to the right of the 'mountains').

The left hand side (above) is grayed out because we are at the first record of seventeen i.e. we are at the beginning of a group of 17 clients. There are a total of 1844 clients in this database. The group of numbers under the rolodex tell us that we are looking at client record number 1, that the last search found 17 client records out of a total of 1191 clients and that this group has not been sorted (by name or date or anything else).

This group has not been sorted (by name or date of birth etc.)

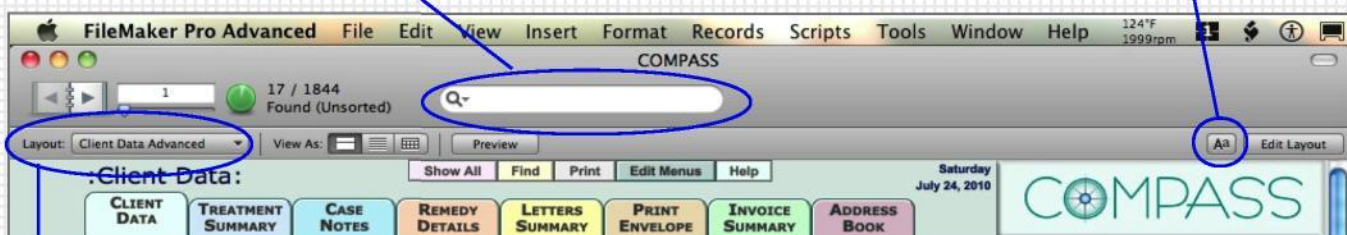
In Client Data the Rolodex show the numbers of clients, in Remedies how many prescriptions (for one or all your clients), in Invoices the number of invoices, in Address Book the number of contacts and so on.

Click Show All and then scroll through the records clicking on the pages of the rolodex.

Zoom through some or all of the records (to the beginning or the end) by dragging the 'slider'.

Search through any field at the screen you are viewing for a word or phrase.

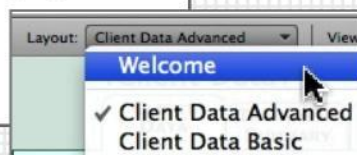
Show or hide the Formatting Bar (Right Click for the same options or go to the Format Menu).



Layout confirms the screen being viewed - in this case it's Client Data - Advanced.

You can click on the downward pointing arrow to go to some other screens but unless you are familiar with FileMaker it is better to use the tabs and buttons to navigate your way around COMPASS.

An exception to this is to return to the Welcome screens.



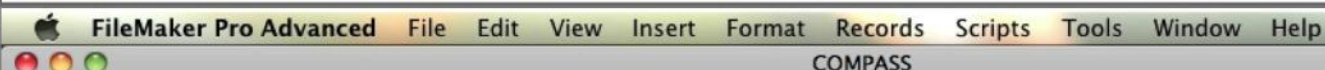


# :Compass Tips—The Menu:

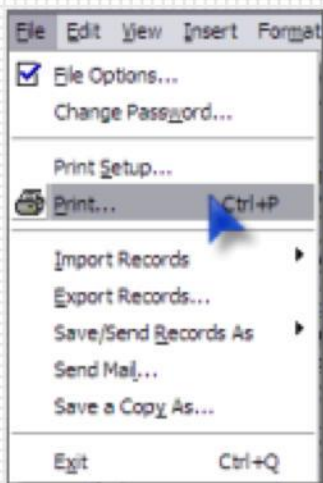


## 10. The Menu

The menus are similar in format and content to all your other programs. It's worth spending a couple of minutes checking out what is available in each menu.



You can use the first 5 menus freely although in practice you'll get by as well with the functions that are programmed into COMPASS and using the menus that drop down when you 'right click.' The last 5 menus are full of 'trouble'. You will do well to avoid using them, especially if you are someone who likes to learn by doing. If you aren't sure - don't do it. The worse you can do is delete data which can never be recovered. The Help menu is for FileMaker not COMPASS.

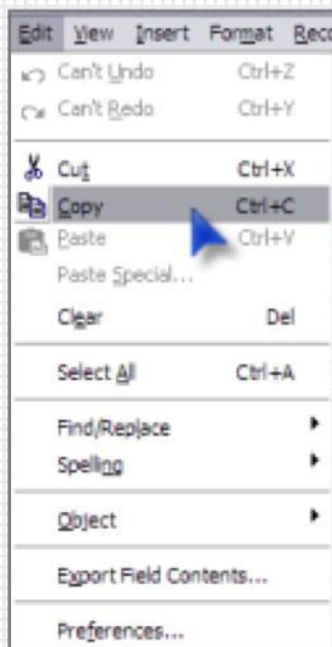


### The File Menu

You can change your Password here, or check the Print Setup or Print.

You can import records from an excel file or export to one.

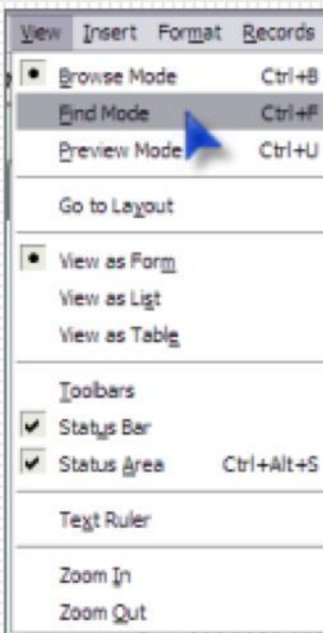
You can exit COMPASS using this menu and you will still be prompted to back up!



The Edit Menu looks much like any other program (i.e Word) - with Undo/Redo at the top ... then Copy, Cut Paste and Clear ... then Select All.

You can check a User Dictionary is selected in Spelling.

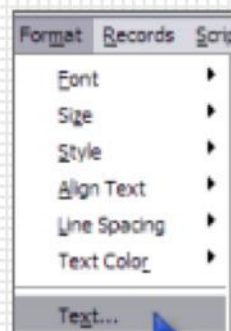
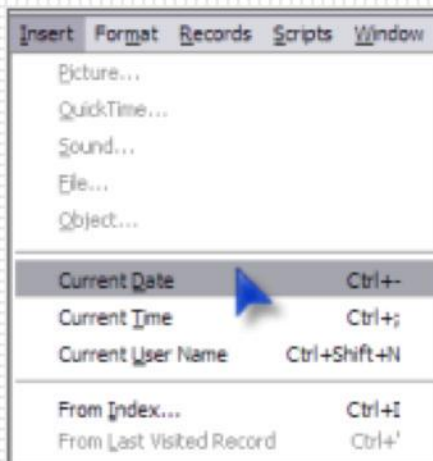
That's it for this menu - Find/Replace and Export Field Contents is for advanced users only.



### The View Menu

You won't be needing much here. Maybe you want to get rid of the toolbars to give yourself extra 'real estate' on your screen - or bring them back to format something. Or to show or hide the Status Area.

You can zoom with the mountains (bottom left).



The Format Menu is self explanatory - click on Text at bottom for easier formatting.

Click in a field to use the Insert menu ... a text field to insert the date or time or your name ... a graphical field (photo) to insert a picture or file.



# :First Steps—Introduction



## Getting Started

These steps will get you using the most important features of COMPASS in a heartbeat.

Print out these pages and work your way through them at your own pace.

If you are someone who likes to learn by throwing yourself at a challenge then Go For It without any 'help' and come back to these steps later to see how you did!

Your First 5 Steps in COMPASS will only take an hour max.

- 1. Customize the Settings for your Practice**
- 2. Add a New Client**
- 3. Schedule an Appointment**
- 4. Enter a New Case Note**
- 5. Create a New Remedy**

Your Next 5 Steps could take a little longer the first time but with 'practice you'll get quicker and quicker.

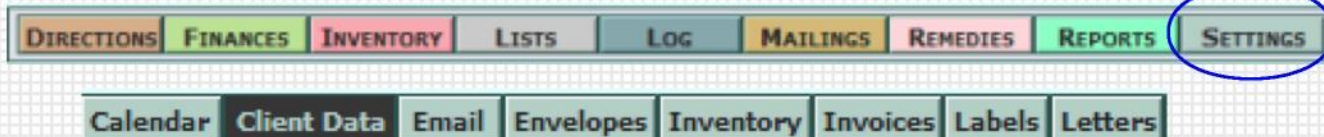
- 6. Issue an Invoice**
- 7. Make a Payment and Send your Client a Receipt**
- 8. Send a letter with remedy instruction**
- 9. Send a email appointment confirmation**
- 10. Fun Stuff**



# :Step 1—Getting Set Up:



## Step 1: Customize the Settings for your Practice



Click on Settings from your Client Data screen (bottom right button). You will be taken straight to the Client Data settings screen.

Client Categories	
Client Category 1	General Clients
Client Category 2	Bo
Client Category 3	Ca
Client Category 4	Ph
Client Category 5	St
Client Category 6	Te
Client Category 7	Ta

Enter your primary practice locality or name in the Client Category 1 field. If you have more than one practice you can enter them now.

One category can be assigned to general (non-patient) clients if some of your income comes from sources other than patients.

If you are a student then type in the clinic name at your school or the words School Clinic etc.

You can delete the words 'Your Practices' from all the other fields.

Click on the Email Settings next and fill out the first two fields:

Your outgoing SMTP Host first (you'll find that in the Help Manual under Emails - ISPs List).

Your own email address in the second field.

An email signature - your name, business name, address, phone number, email, website - or some combination of these. Some people add a pithy quote.

Then click Send TEST Email. In a little while an email from you to you should arrive in your normal email box i.e. it will not arrive back in COMPASS.

Click on the Letters Settings next and select your default letter size (A4 or US Letter) and your default printer.

Then type in a header and a footer. We've put some words in the header and the footer to help you get started.

You can insert your own logo in the header and/or the footer if you prefer.

If you have your own headed paper already you will need to delete all data in the header and the footer.



## :Step 2—New Client:



### Step 1: Add a New Client to COMPASS

#### NEW Client

Click New Client then click Adult in the next dialog box.

**Choose**

What type of client are you adding?

---

**Add New Client**

Enter Name

First Name  
Annay

Last Name  
Greengabelle

Company

Type **all the letters** of the first **and** the last name if it's a fairly common name. If it's not common then just 2 or 3 letters will do. Then click **OK**.

The 'company' field is for 'clients' who pay you who are not patients. Don't worry about those for the time being.

COMPASS checks the name you entered is not a duplicate. You'll get a message confirming it isn't. Click **YES** to enter this Client.

Enter the client's contact details at the Client Data screen including:

Birthday, Sex, Address, Phone Numbers, Email etc.

Tips: Tab from one field to the next or press enter after you've finished entering information and your cursor will jump to the next field automatically.

These fields are customizable - you can use them for a 2nd email address or website and for recording a client's work or other situation.

NEW Client ☒ Adult ☐ Parent ☐ Child

First/Last	Annay	Greengabelle
Company		ID 2138
DOB/Age		Sex
Address 1		
Address 2		
City		
County/State		
Postcode/Zip		
Country		No Mass Mail <input type="checkbox"/>
Home Phone		
Work Phone		
Cell/Mobile		
Fax		
Send Email		Copy
Website		
Job/School		
Primary Doctor		
Parents		ID
Family Note		
Referred by		
Referral Source		

<b>Client Category</b>	<b>Audit Data</b> <input type="button" value="Clear"/>
<input type="checkbox"/> General Clients	<input checked="" type="radio"/> New Client
<input checked="" type="checkbox"/> Boca Raton	<input type="radio"/> Similimum
<input type="checkbox"/> Gainesville/Deland	<input type="radio"/> Similar/s
<input type="checkbox"/> Phone	<input type="radio"/> Doing Well
<input type="checkbox"/> Students	<input type="radio"/> Variable
<input type="checkbox"/> Inquiry	<input type="radio"/> No Response
<input type="checkbox"/> Tampa	<input type="radio"/> No Feedback
	<input type="checkbox"/> Non Current

Before you go to the next step make sure you 'categorize' your client by clicking the relevant practice category.

Then click New Patient. And now you are done with the basics of adding a new client.







## :Step 4—New Case Note:



### Step 4: Create a New Case Note for your New Client.

Go to Client Data and click the **Treatment Summary** tab.  
\*

**:Client Data:**

CLIENT DATA TREATMENT SUMMARY CASE NOTES

NEW Client ☒ Adult ☐ Parent ☐ Child

First/Last: Annav Gr

**:Treatment Summary:** Find Print

CLIENT DATA TREATMENT SUMMARY CASE NOTES REMEDY DETAILS LETT SUMM

Name: Annav Greengabelle DOB: ID: 2138

Parents: Company:

**CASE NOTES SUMMARY** NEW Case Note

Date Type of Appointment Time Response F

Click **New Case Note**.

Fill out the top fields by making your selection in each one and pressing the enter key (desktop) or Ctrl/Cmd+Enter (laptop) or clicking with your mouse.

You will be taken to the next field with its menu visible.  
Since this is a First Appointment the Response will be N/A.

If you don't see the selection you want in a menu then add it.

**:Case Notes:** Print Appt Print All Appts Edit Menus Help

Thursday January 8, 2009

CLIENT DATA TREATMENT SUMMARY CASE NOTES CASE DETAILS VIEW 2/4 APPTS. REMEDY DETAILS RESEARCH NEW Note Forms Graph

Name: Annav Greengabelle DOB: ID: 2138

Date: Jan 8, 09 Type of Appointment: Time: Response: Presenting Complaint/s:

End Top 2 Next > Last >> Full Screen Edit Keynotes Themes/Keynotes

Acute Appt: Office  
Acute Appt: Phone  
Background Notes  
Client Notes  
Discussion with colleague  
F/U bet appts: Ph/Email  
First Aid  
First Appointment: Office  
First Appointment: Phone  
Follow Up Appt: Office

That's it! You've entered a new case note for your client.  
Now type in some data and have fun getting familiar with the various tabs and buttons at these Case Notes screens.

Click on Case Details to see how that screen is different from Case Notes - there are LOTS more choices there for one thing.

Check out the Full Screen next - some people prefer to take cases using this one.  
See which one feels the most comfortable to you, the easiest to work with.

\* You can click on the Case Notes tab when you are in Client Data but if there are no notes for the client yet you will receive a friendly message inviting you to add one!



## :Step 5—New Remedy:



### Step 5: Give your New Client a Remedy

Go to Client Data and click the **Treatment Summary** tab.  
\*

Click **New Remedy**

Fill out the prescription fields by making your selections (you can type to it) and pressing the enter key (you may need to press it twice depending on whether you are on a desktop or a laptop). You will be taken to the next field with its menu visible already. You can also tab to the next field.

If you don't see the selection you want in a menu then click on Edit Menus and add it.

Enter as much information as possible as this will help you analyze your results later down the line. Track your confidence levels and results to find out if your levels of confidence are reliable - or not! Track wet v. dry doses and potencies to see if there's a tendency to get more or less aggravations with one or the other.

That's it! You've entered a new remedy for your client.  
Now have fun getting familiar with the various tabs and buttons at this.

Click on some of the other tabs to see where they lead you.

\* You can click on the Remedy Details tab when you are in Client Data but if there are no notes for the client yet you will receive a friendly message inviting you to add one!



## :Step 6—New Invoice:



### Step 6: Issue Your New Client with an Invoice.

Click on the **Invoice Summary** tab in Client Data, and click the **New Invoice** button. A new invoice will be created and you will be taken to the Invoice Data Entry screen.

Fill out the THREE, yellow fields. That's all. Select Consultation and the code will automatically enter. Select \$100 for the amount and select Check in the Payment type field.

If the Product or Service menu isn't to your satisfaction then click the Edit Menu button and fix it before making that selection.

Spend a couple of minutes familiarizing yourself with this screen. Click on Settings and enter in your primary tax or VAT amount. Then return to this screen and check the Tax box - see what happens. Change the tax amount at this screen (type in a different amount in the Tax line (above Total/below Sub-total) and see what happens! Now uncheck the tax box.



## :Step 7—Pay Invoice:



### Step 7: Make a Payment and Send your Client a Receipt

Go to the **Invoice Summary** screen - you'll see the \$100 charge listed there.

There are two ways to pay this (and to pay any invoice):

1. Click the **View** button next to the due Invoice to go to the Invoice Summary screen.
2. Click the **Payments Due** List tab to view and pay it there - this screen is good for 'paying' multiple invoices.

**:Invoice Summary:** Show All Find Print Help

CLIENT DATA TREATMENT SUMMARY **INVOICE SUMMARY** INVOICE DATA ENTRY STATEMENT 30/60/90 DAY REPORT **PAYMENTS DUE LIST** FINANCIAL

Name Annav Greengabelle DOB [ ] Account Status [ ] Payment Plan [ ]

Parents [ ] ID 2138

Company [ ]

2 Card Details Credit Card Number [ ] Expires [ ] Code [ ] Name on Card [ ] cc Zip [ ]

NEW Invoice [ ]

Date	Amount	Payment Date	Amount	Due	Due/Paid/Write Off	Payment Method
<b>View</b> Jan 8, 09	100.00			100.00	<input checked="" type="radio"/> Due <input type="radio"/> Paid <input type="radio"/> Write Off	Check

**Verify Information**

Pay the full amount, \$100 by Check.

Cancel Pay

Payment Type [ ] Check # [ ] Payment Amount [ ]

Tax (6.255) %

Total 110.00

Payment 110.00

Amount Due 110.00

Pay in Full Make Part Payment

1. At the Invoice Data Entry Screen click the **Pay in Full** button and then click **Pay** when asked for ALL information to be automatically entered (today's date, the correct/full amount and payment type).

2. At the Payments Due screen click the **Pay in Full** button and then click **Pay** when asked for ALL information to be automatically entered (today's date, the correct/full amount and payment type). The payment status will be 'Paid' instead of 'Due'

**:Payments Due List:** Find ALL Payments Find Credit Cards Find Checks Find Todays Print Payment

CLIENT DATA **INVOICE SUMMARY** INVOICE DATA ENTRY **PAYMENTS DUE: LIST** PAYMENTS DUE: FULL PAYMENTS DUE: PART FINANCIAL REPORTS PRICE LIST WRITE OFFS

First	Last	Name on Card	Credit Card Number	Expiry	ZIP	Vcode	Inv Date	Amnt Due	Pref Method	Approval
<b>View</b>	Annav	Greengabelle					8 Jan 09	100.00	Check	<b>Pay Full</b>

100.00

The payment status will be 'Paid' instead of 'Due'

**Payment Status for this Inv.**

☒ Due ☐ Paid ☐ Write Off

**:Invoice Data Entry:** Find Print

CLIENT DATA **INVOICE SUMMARY** **INVOICE DATA ENTRY** INVOICE

Name Annav Greengabelle DOB [ ]

Click on the Invoice tab to print a paper or pdf copy of this client's invoice!



## :Step 8—New Letter:



### Step 8: Print Remedy Instructions for your New Client

Go to **Remedy Details** from Client Data or Treatment Summary or Case Notes!  
Select one of the 10 Templates (bottom right) - you will want to edit these to suit the way you typically work (and write!)

Click the copy button of the one you worked in and it will magically appear in the Instructions field at left. You can edit it there - adding your patient's name and Pharmacy details if you patient needs to order their remedy directly.

You can add extra notes by clicking the copy button next to another template and that will automatically appear after the first one.

Instructions to Client	Copy	LETTER A4	Pharmacy Details	SETTINGS
Dear Anna			OHM PHARMA, Miami - 1.800.903.7646/305.470.7576 <a href="http://ohm-pharma.com/">http://ohm-pharma.com/</a>	
Your remedy: Dulcamara 30C			Hahnemann Labs: 888 427 6422 <a href="http://hahnemannlabs.com">hahnemannlabs.com</a>	
You'll be able to purchase it from: This Pharmacy			Homeopathy Overnight: 800 ARNICA 30 - <a href="http://www.homeopathyovernight.com">www.homeopathyovernight.com</a> (800 276 4223)	
Ignore the disease condition listed on the label - it's a legal requirement and may have nothing to do with your symptoms.			Natural Health Supply: 888 689 1608 - <a href="http://www.naturalhealthsupply.com">www.naturalhealthsupply.com</a>	
Take two doses altogether: one at bedtime and one the following morning. Only two doses. Do NOT taken any more doses i.e. do not take it twice daily.			Remedy Source: 877-821-2139 <a href="http://remedysource.com">remedysource.com</a>	
One dose = 4-6 pilules (see additional directions below).			Washington Homeopathic Products: 800 336 1695 <a href="http://www.washingtonhomeopathic.com">www.washingtonhomeopathic.com</a>	
Please get in touch with me by email or phone about 4 weeks after you have taken it for a half hour follow up appointment. If you have had no response whatsoever 2 weeks after you take it please let me know.			Helios Homeopathic Pharmacy - UK: 011 44 1892 536393 (v/m) 1892 537254 (live person) Email: <a href="mailto:order@helios.co.uk">order@helios.co.uk</a> Website: <a href="http://www.helios.co.uk">www.helios.co.uk</a> Alooworths UK: 011 44 (0)1892 536393	
PLEASE keep notes of any responses - and the dates they occur. That information will help me				
		Copy	Adult Dry Dose	Copy
		Copy	Adult Wet (Test) Dose	Copy
		Copy	Adult LHs	Copy
		Copy	Child: Dry	Copy
		Copy	Child: Wet	Copy
		Copy	Child: LHs	Copy
		Copy	Additional Notes: Adult	Copy
		Copy	Additional Notes: Child	Copy
		Copy	REMINDERS - FAQs	Copy

Click the orange Letter (or A4) button to view your Instructions in a letter where you can edit it further and/or just print it out to give or send to your client.



## :Step 9—New Email:



### Step 9: Send your client an Appointment Confirmation by Email

**:Letters Summary:**

REMEDY DETAILS LETTERS SUMMARY PRINT ENVELOPE

Child Change Status Client List All

CLIENT DATA TREATMENT SUMMARY SINGLE LETTER/EMAIL

Name: Annav Greengabelle DOB: [redacted]

Parents: [redacted]

Company: [redacted]

NEW Letter or Email

Click on the yellow **Letters Summary** tab in Client Data and then Click **New Letter or Email** and select **Email** when asked.

**Create a New Email or Letter**

Would you like to create a new email or letter for this client?

Cancel Letter **Email**

**:Select an EMAIL Template:**

CLIENT DATA SINGLE MAILINGS SELECT AN EMAIL EDIT A TEMPLATE

Click on the Edit a Template tab (above) to write

**BLANK EMAIL**

Adult Email Email to Parent

**TEMPLATE 1 Gainesville Office - New Client Letter**

Adult Email Email to Parent

Click Blank Email/Adult Email and write one! Then print it out.

You can 'copy' information - like your patient's next appt and paste it into the letter.

Fill out the Letter Description and Note fields so you have an accurate record on file.

The menus work a little differently - start typing and it will recognize a word or phrase you've typed before. Or not!

**:Adult Email:**

Date Created: Jan 8, 2009 Date Sent:

From (email): email@mirandacastro.com

To (email): [redacted]

Email Subject: Enter a Subject

Body of Email: Dear Annav

When you visit me for the first time I will need to know the state of your current health in detail. In addition I will also require some routine medical history, so please complete the form that I'm attaching to the next email and bring it with you to your first appointment or email it back to me (and save paper!) Please include a list of any medications you are taking (including supplements) as well as any homeopathic or herbal preparations as well as a list of any homeopathic remedies you have taken in the past. It is not obligatory for you to fill out this form - it just saves a little time at our first appointment.

I am sending you some information about Homeopathy and my Fee Schedule in a separate email to make them easier to read. If you have any problems downloading the attachments let me know - I'll happily send them to you by regular mail! If you don't receive any emails with attachments check your spam or junk mail box! If you have any further questions there will be time to talk them through when you come to see me.

I look forward to seeing you on!

Your practitioner is at the home office of Miranda Castro (Personal correspondence).

Help

CLIENT DATA SINGLE MAILINGS EMAILS SETTINGS

Copy Name Annav Greengabelle

Copy Parents

Copy Company

Copy Email

Copy Next Appt at

Send THIS Email Add Attachment Detach

Send TEST Email

Print Email

Change Template

Date	Type	Description	Note	Template
Jan 8, 09	Adult Email	New patient letter		Adult Email #1
Jan 8, 09	Adult Letter	New patient letter		Adult Letter Blank

Having mastered a blank email - why don't you Change the Template next. Click that button. Bear in mind this is a 'dummy' and the data in the letter will now be changed!

You will be taken back to the Select an Email Template screen. Make the first one your main practice appointment confirmation letter - change the heading to fit and edit that template letter so it's just right.

You will have to return to Single Mailings and click the View button next to the email you created to change it to your new template or you can create a new email of course!

Once your templates are perfect you'll find you can save yourself hours of work each month with this feature alone. Confirming appointments is excellent business practice - your number of 'no shows' will drop to virtually nil.



## :Step 10—Fun Stuff:

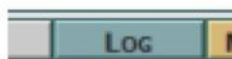


### Step 10: Miscellaneous Fun Stuff

**Daily Log.** Go to Client Data and click on Log (bottom button) and select Today.

You'll see your new client there with the correct date (today's) under the Date Created column as well as a consult and an invoice - all with today's date. Perfect!

Check the log every day - action items and invoices will never again slip through your net! Seeing someone's name there will jog your memory about something you said you'd do but forgot to write down.



**Client Photo.** Go to client data and click on the photo album of your new client.

Click **Insert**, locate a jpg on your hard drive and insert. Now delete it and insert another. Give them titles and dates.

**TRACKER** New Track Clear

Follow up Tracker

Date

Due Date

**To Dos** New Action Clear

To Do List

Date

Priority

**Tracker.** Click **New Track** and a note about following up with this client. Add a due date if relevant. Now click the Tracker tab and find it (Clue: click the Find all Clients with follow up notes button).

**To Dos.** Click **New Action** and select a priority etc. Click the To Dos tab to view it in a list!

**:Address Book:** Show All Find

CLIENT DATA ADDRESS BOOK PHONE LIST EMAIL LIST AD

ID 4999 NEW Contact DELETE Contact

First/Last Jim Hoyt

Title/Position Director & CTO

Company COMPASS

Categories

DOB/Age January Birthdays

Address 1 PO Box 359

Address 2

City Great Cacapon

County/State WV

Postcode/Zip 25422

Country USA

Home Phone

Work Phone 304 932 0499

Cell/Mobile

Phone 2

Fax

Send Email 1 support@compass4us.com

Send Email 2 learn@compass4us.com

Go Website www.compass4us.com

Copy Contact Info Jim Hoyt COMPASS

Date Created Jan 20, 2006 Date Modified Dec 20, 2008

### Address Book

Go to your Address Book (top right tab in Client Data) and enter yourself. Type in your names, address, phone numbers & email/web address etc.

You can put your driving license number and other important numbers in the Important Numbers fields. If you don't like the labels on those fields you can change them ... click on the Settings tab (bottom right) and rename any or all of them.

Now click the copy button next to Contact Info and paste it into an email in another program. See how easy it is to share information - to make a referral for example.

Now put a photo of yourself in your own Photo Album in the address book.

Give yourself a Task - a project and make it time sensitive.

**CONGRATULATIONS** - you're a pro now! Enjoy all your journeys - homeopathic and healing, with or without COMPASS. Please let us know what is particularly helpful (we'll make it better if we can), tell us what doesn't work (we'll fix it), and also what you wish it could/would do (we'll listen carefully and work on it). Thank you for your healing work, Jim & Miranda & Ellen



# :Organon:



There is sweet inspiration waiting for you each time you open COMPASS: a random aphorism of the day from Hahnemann's Organon at the bottom of your Client Data screen. These are Julian Winston's mini-summaries.

135. The whole picture of the remedy can be understood through a study of all the provings. The substance is thoroughly proved when no new symptoms are seen



Click on the icon to select another random aphorism.

ORGANON

APHORISM OF THE DAY  
Summary by Julian Winston

135. The whole picture of the remedy can be understood through a study of all the provings. The substance is thoroughly proved when no new symptoms are seen

Click on the Organon button to view the full aphorism in the following versions of the Organon side by side:

Wenda O'Reilly's modern translation:  
4th Edition  
Dudgeon's 5th  
Boericke's 6th  
Kent's Commentaries  
Winston's Summaries

Hahnemann's Organon: Show All End Help Narrow Wide Change Screen View

CLIENT Data Aphorism First Prev 13 Next Last Find an Aphorism by Number Copy ALL versions of this aphorism

O'Reilly's Translation	4th Edition	Dudgeon (5th Edition)	Boericke (6th Edition)	Kent's Commentaries	Winston's Summaries
Initial and Counter-actions §62. Whence stems the ruinous result of the salutary, antipathetic procedure and the salutaryness of the reverse homoeopathic one is explained by the following experiences, extracted from manifold observations. These cover caught anyone's eye before me, no matter how near they lay and no matter how evident and evidently important they are for curative purposes.  (© Organon of the Medicine Art ed. by Wenda O'Reilly 2008. www.birdcagebooks.com)	§ 62. But it may be readily conceived that the healthy state will make no perceptible reaction in an opposite sense, after weak and homoeopathic doses of agents that enervate and change its vitality. On due attention, it is true that even small doses produce primitive effects that are perceptible, but the reaction made by the living organism never exceeds the degree that is requisite for the re-establishment of health.	§ 62. But on what this pernicious result of the salutary, antipathetic treatment and the efficacy of the reverse, the homoeopathic treatment, depend, is explained by the following facts, deduced from manifold observations, which no one before me perceived, though they are so very palpable and so very evident, and are of such infinite importance to the healing art.	§ 62. But on what this pernicious result of the salutary, antipathetic treatment and the efficacy of the reverse, the homoeopathic treatment, depend, is explained by the following facts, deduced from manifold observations, which no one before me perceived, though they are so very palpable and so very evident, and are of such infinite importance to the healing art.	Paragraph (July 1850) But on what this pernicious result of the salutary, antipathetic treatment and the efficacy of the reverse, the homoeopathic treatment, depend, is explained by the following facts, deduced from manifold observations, which no one before me perceived, though they are so very palpable and so very evident, and are of such infinite importance to the healing art.	§ 62. The reason palliation is dangerous is explained in paragraphs 63-69.

go to: [www.julianwinston.com](http://www.julianwinston.com)

This is an incomparable study tool for students and practitioners.

Acknowledgments: Thanks to Wenda O'Reilly for the aphorisms from her beautiful book.

[www.birdcagebooks.com](http://www.birdcagebooks.com)



## :Contact Us:



If you didn't get the help you needed or would like to get in touch with us for any reason at all (we always appreciate feedback) please contact us by phone or email or by filling out the form at our website:

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Technical support: [tech@compass4us.com](mailto:tech@compass4us.com)

Qs about using COMPASS: [learn@compass4us.com](mailto:learn@compass4us.com)

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