COMPASS

COMPASS INDEX

GENERAL HELP

: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**

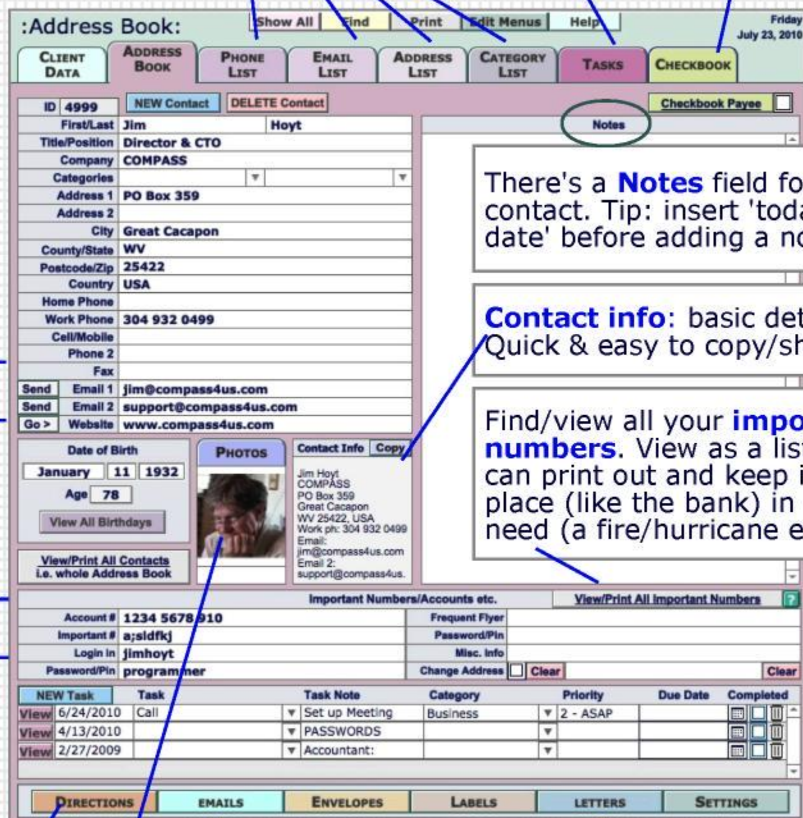
Keep track of **Tasks** that are related to your contacts.

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**.



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.)

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!

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.

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.

EMAILS

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 eac 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.

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

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).

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.

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

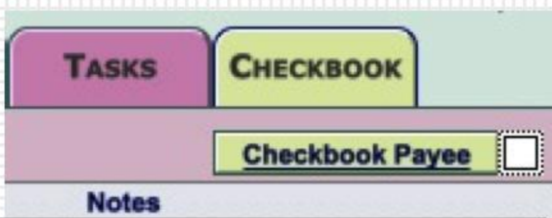
See also **Photos.**

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.

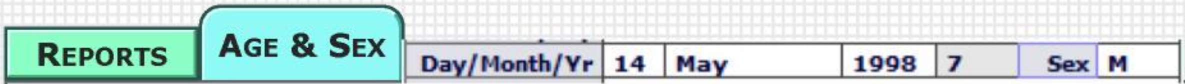
Print out your whole address book using the paper-saving **Contact Information** screen. You'll have a paper record for when you don't have access to your computer.

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.

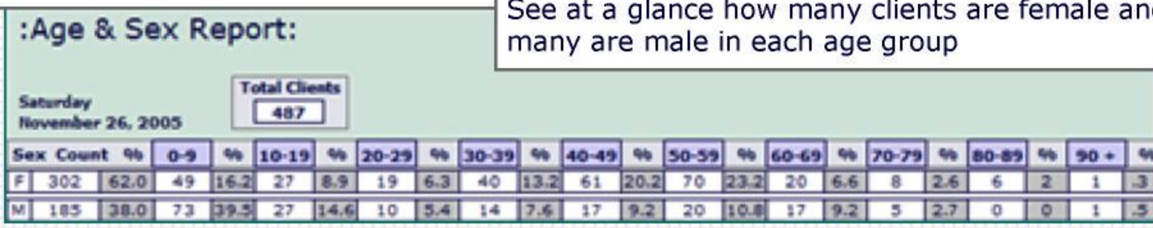
Insert 3 photos per contact in the **Photo Album**.

:Age & Sex Report Help:



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

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



:Age & Sex Report:

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	39.5	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, 70-70, 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.

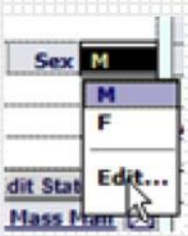
If the largest group of women are in the 40-49 age group and their No. 1 complaint is menopause then writing an article for a local paper on menopause and homeopathy might be worthwhile. Are there any obvious age or sex gaps in your practice that you want to 'fill in' - you might want to brainstorm about 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	Addiction	Mar 13, 03	Sulph.	30C	Acute	Poss. curative		☐
Mar 1, 03	Follow Up Appt: Phone	ADD	Addiction	May 15, 04	Ign.	1M	Chronic	Partial (close)	Mild	☒
May 15, 04	Follow Up Appt: Office	ADD	Addiction	May 16, 04	Kali-p.	30C	Int'current		Mild	☒
May 20, 04	First Appointment:	Acne	Retarded	Jul 20, 04	Abrot.	12C	Acute Exac.			☐
				Feb 3, 05	Abel.	LM 6		Poss. curative	Moderate	☐
										☐

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
- Top 2 Presenting Complaints
- Date, Remedy Name and Potency
- 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.

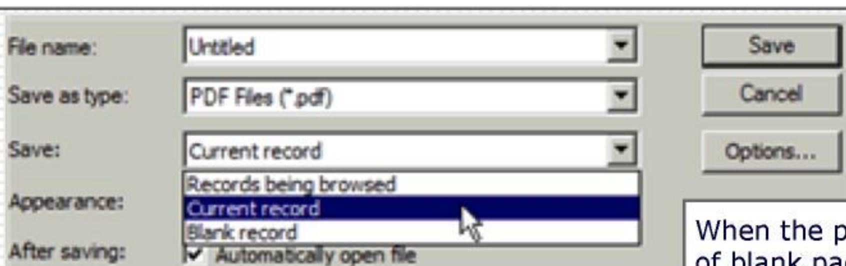
If a client transfers to another practitioner send a copy by mail or email (pdf).

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** - clients 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.



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.

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.

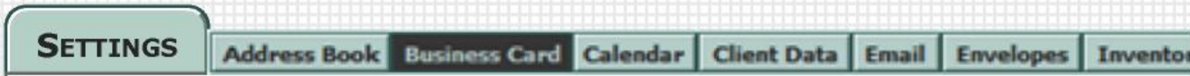
Date	Type of Appointment	Time
Jul 16, 2005	Acute Appt: Phone	.75
Dec 28, 2003	Follow Up Appt: Office	.50
Nov 14, 2003	F/U bet appts: Ph/Email	N/A
Oct 8, 2003	First Consultation: Office	2

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.

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



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.

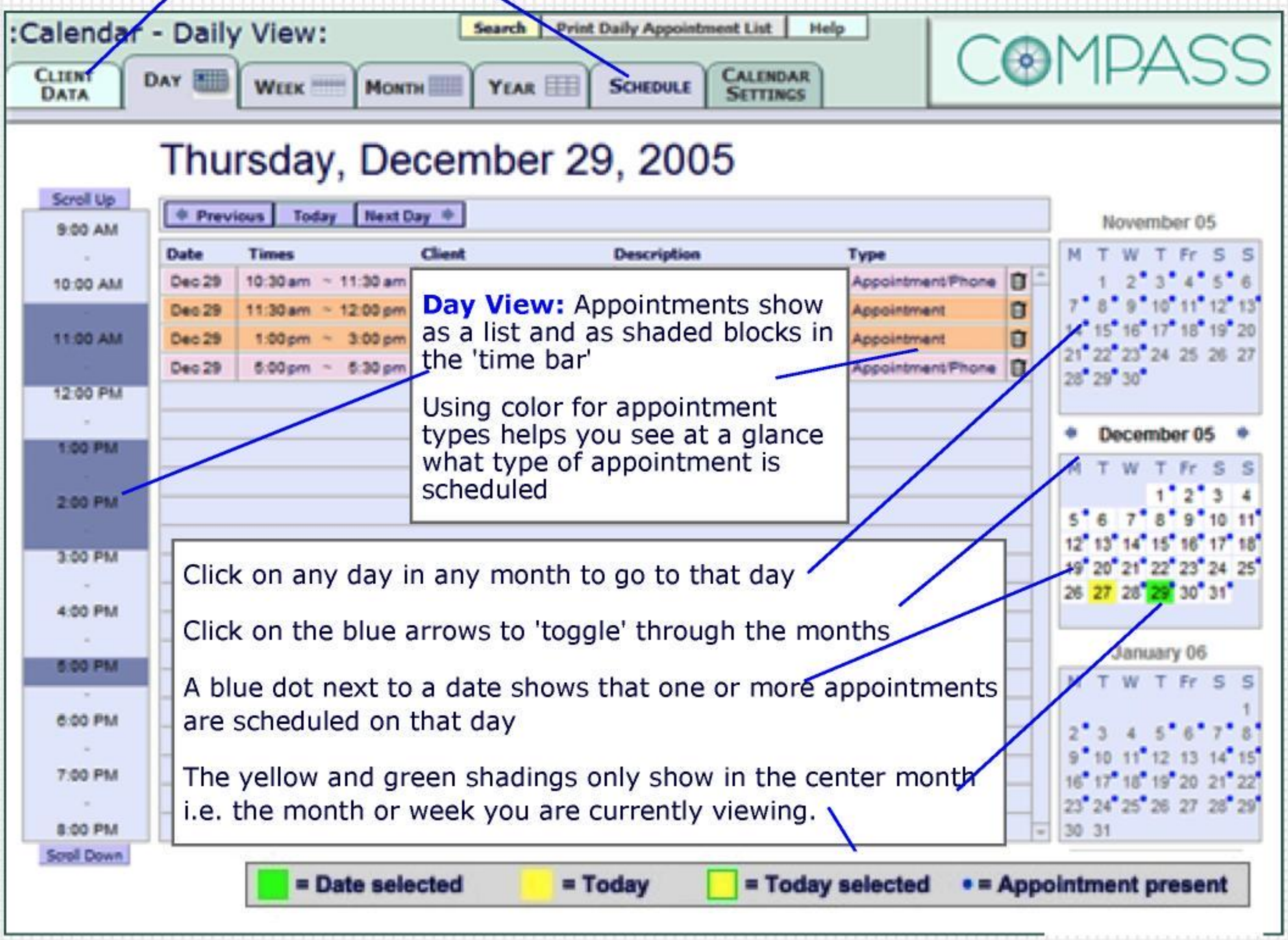
If a client has an upcoming appointment it will automatically be displayed here.

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.



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

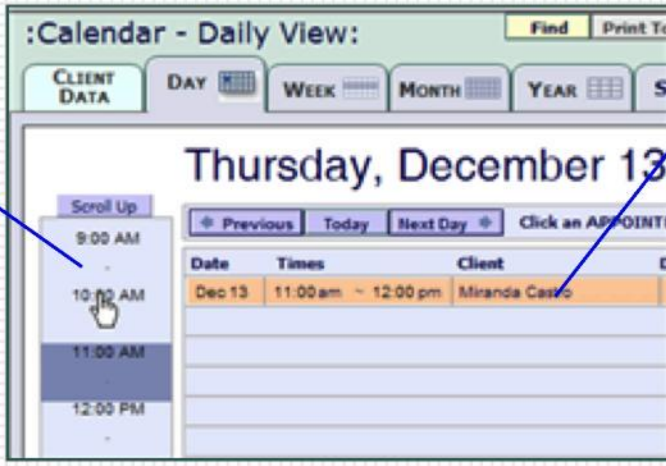
A blue dot next to a date shows that one or more appointments are scheduled on that day

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

:Calendar Help—Create/Edit Appointments:

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

Appointments can be scheduled every 15 minutes.

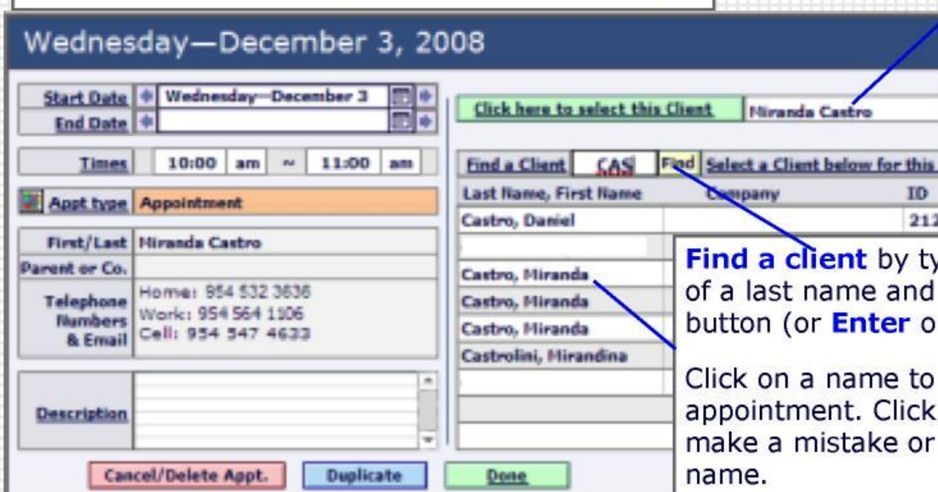


Click on any scheduled appointment in any view in order to **edit that appointment**.

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).



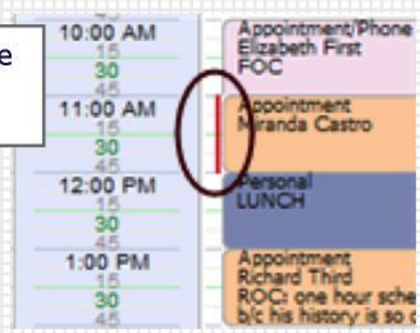
Find a client by typing in the first 2-3 letters of a last name and click the yellow **Find** button (or **Enter** on your keyboard).

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.

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.

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

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).



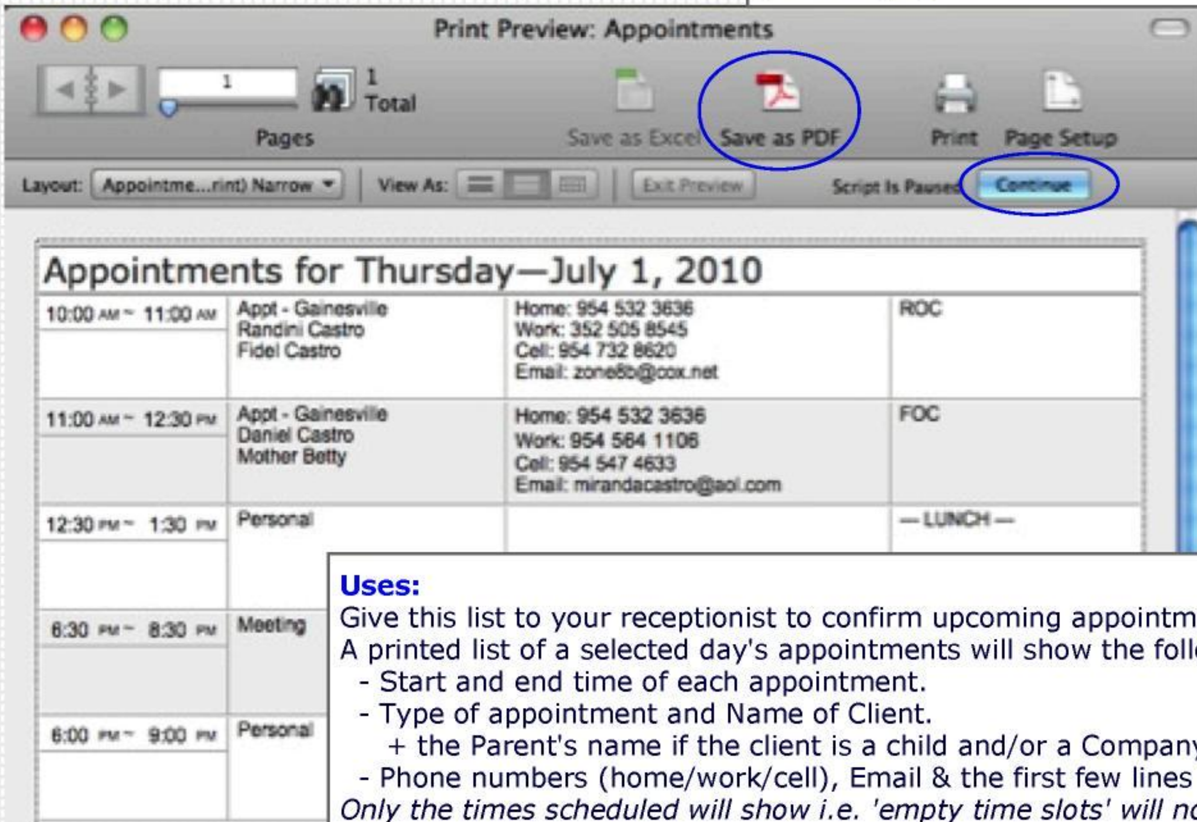
Tips: Use the **Description field** for a note. The first few lines will appear in the printed list. If you don't have a client entered yet then use this field to 'pencil in' their name. If the appointment is to be confirmed then **do not select a type.** You'll can see easily which appointments need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

:Calendar Help—Print Appointments:

Print Today's Appointments

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

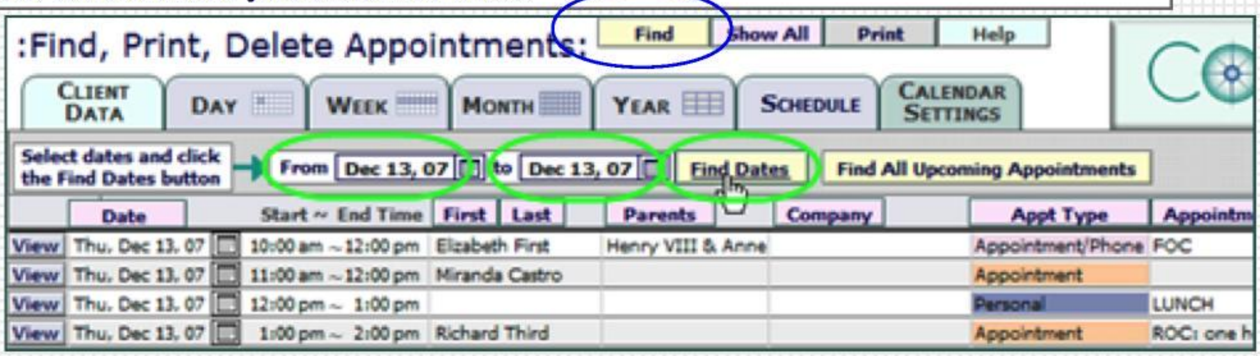
Click **Continue** in the Status Bar (above) to print the list. Or select PDF if preferred. You can **Cancel** in the print dialog box if you change your mind.



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.

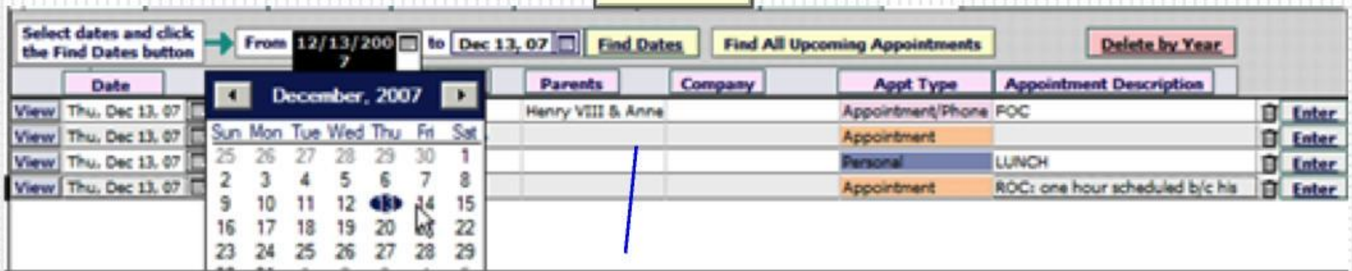


Type the same date into both fields to search for one day's appointments then click **Find Dates**.
Type different dates in each field to find a range of days.
The appointments will automatically sort by time and date. Use the pink buttons to re-sort them.

Once you are happy with the list click **Print** and follow the directions above.

:Calendar Help—Searching:

Find



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.

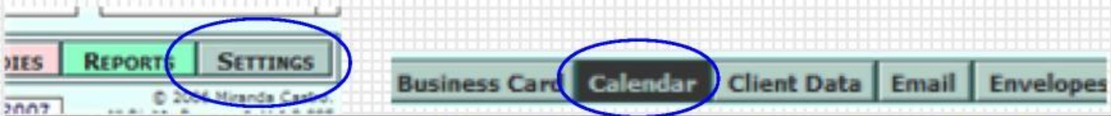
Delete by Year

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.

: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:

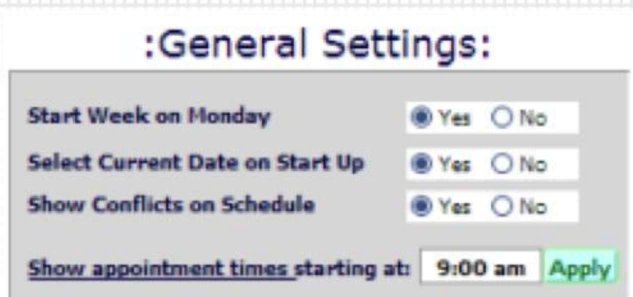
1. Click the New Appointment Type button
2. Name the Appointment Type.
3. Select a color from the drop down list.

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.



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 anc 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.

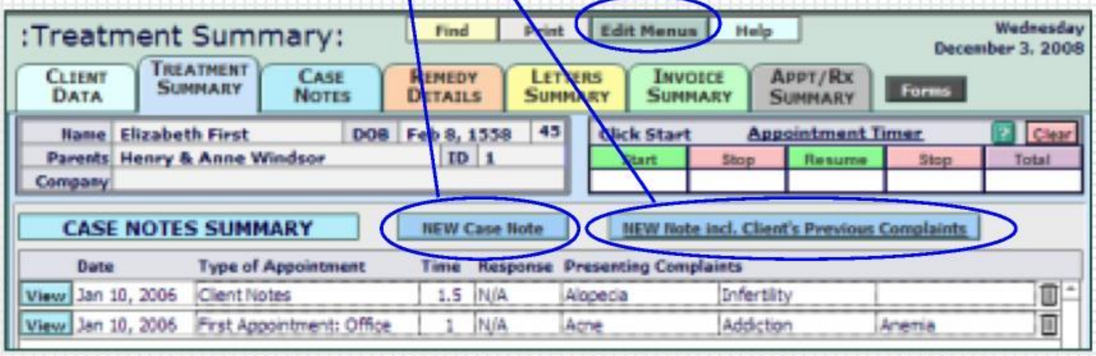
Click on **New Note Plus Complaints** for follow up appointments where the complaints have not changed - they will automatically be entered into the complaints fields.

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.

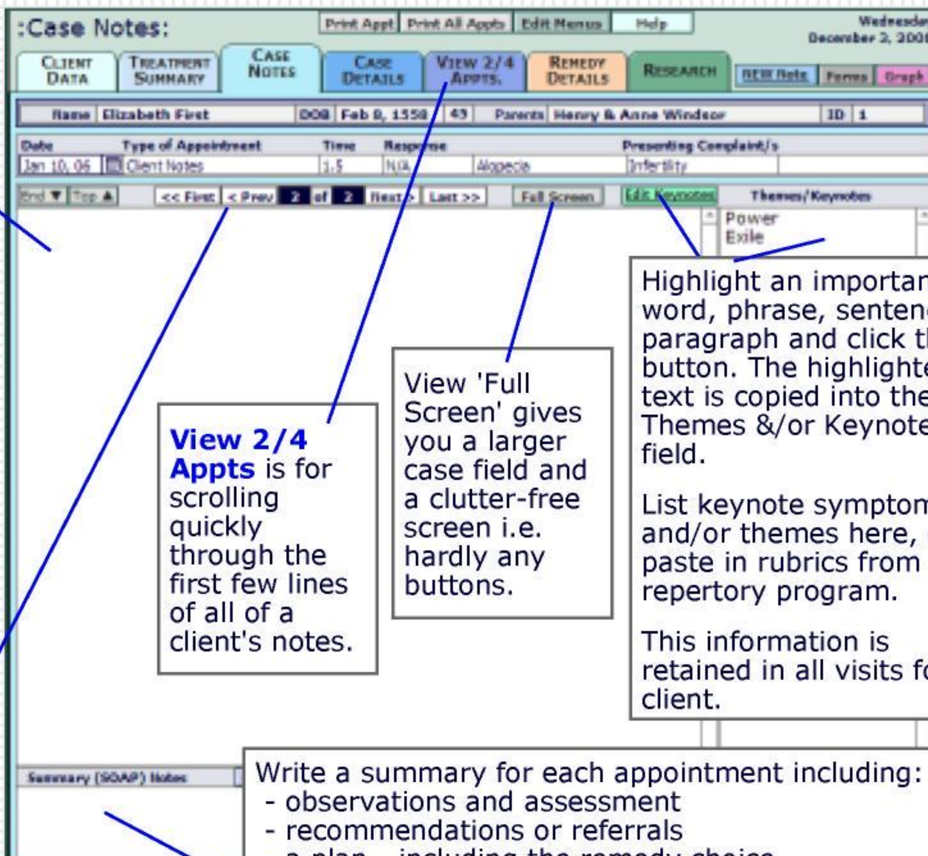


Type the case notes into this field in a way that is easy for you to read and review.

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.



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.

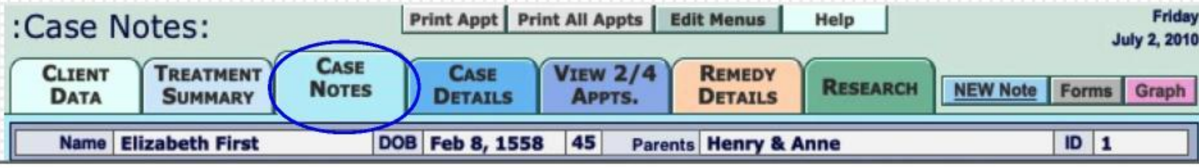
This information is retained in all visits for a client.

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 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:

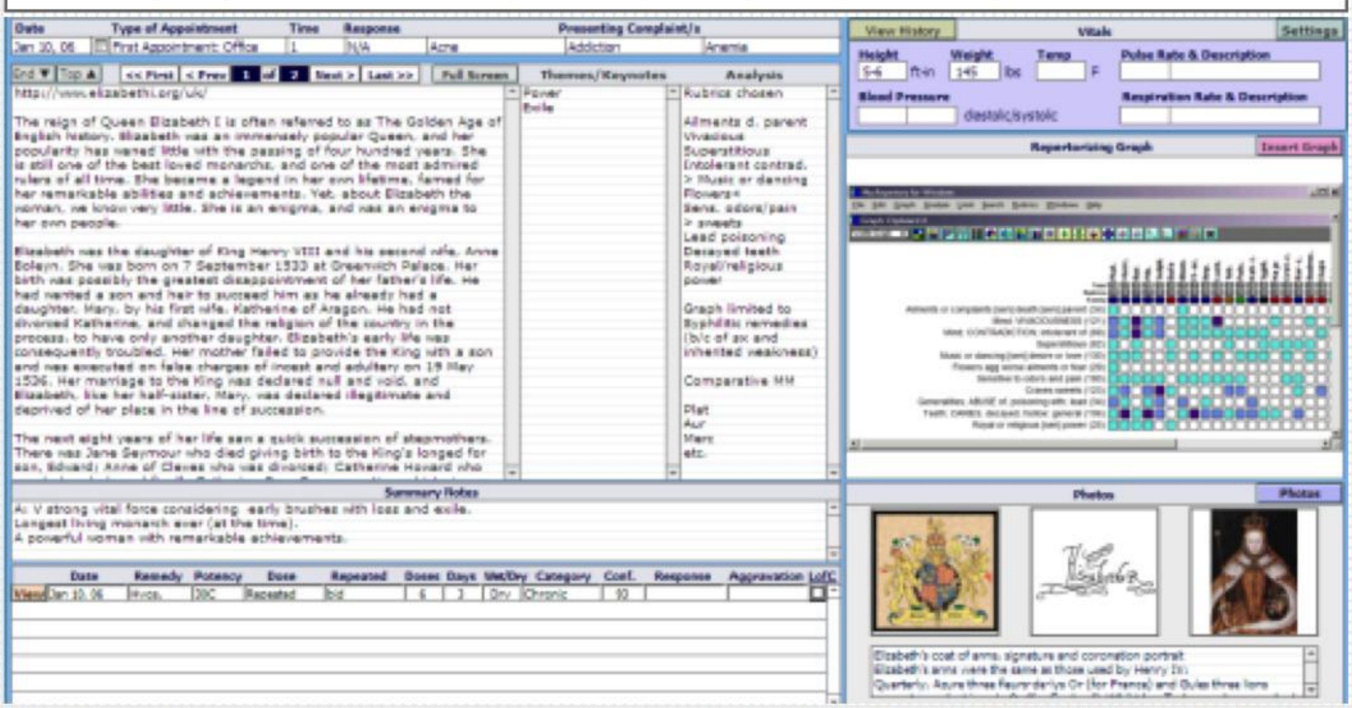
- Case notes: a good sized field for taking case notes.
- Summary Notes: for your assessment and plan etc.
- Themes/Keynotes: a summary field to use any way you would like.

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 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.



:Case Notes Help—Insert a Repertory Graph:

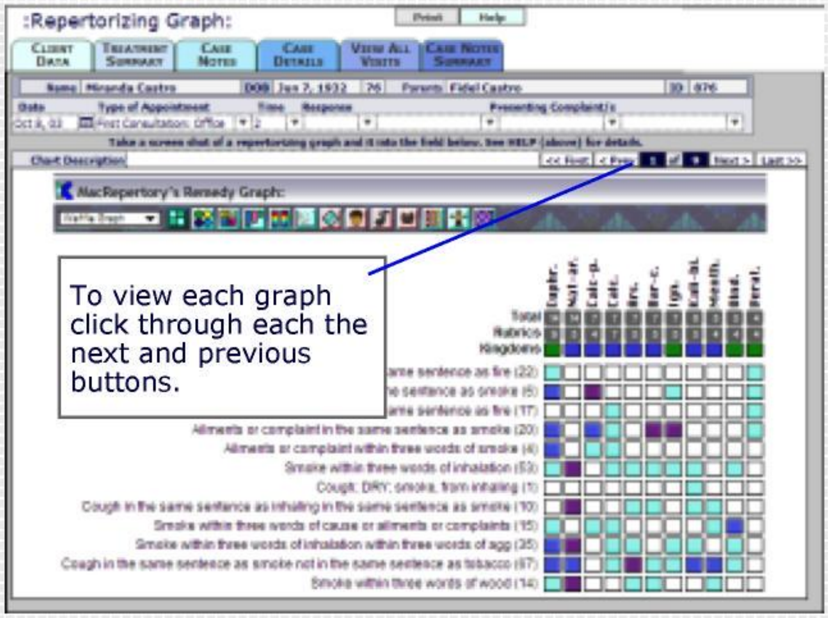
Insert Graph

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

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!

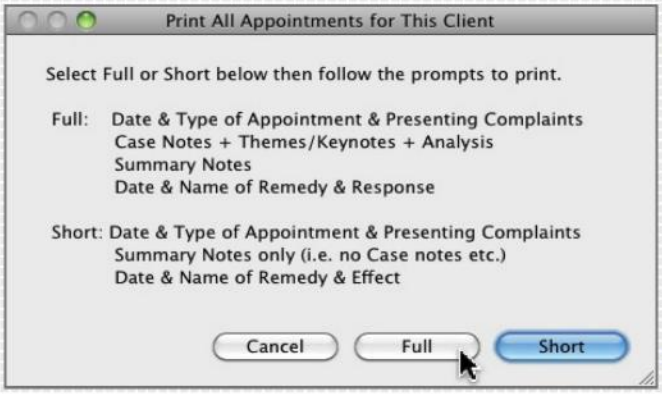
Contact your homeopathic software company as many programs now have a built in facility for taking screen shots of graphs.

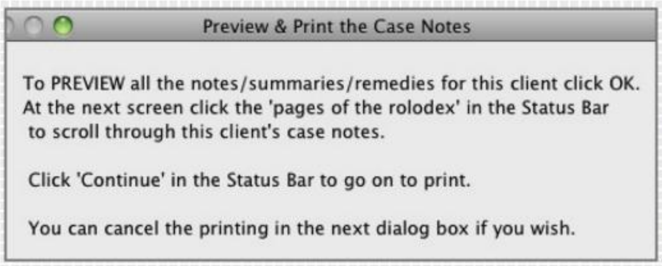
IMPORTANT NOTE: Insert low resolution graphics (images) if possible. High resolution graphics make COMPASS big - a huge program that takes up a lot of space on your computer (on your hard drive) and will quickly become unwieldy to back up.

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 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.

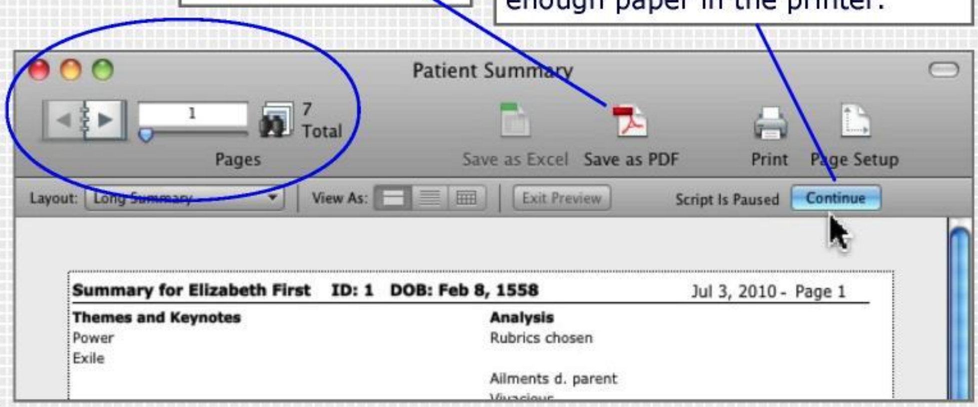
After selecting Full or Short you will receive this short reminder/message!

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.



: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.

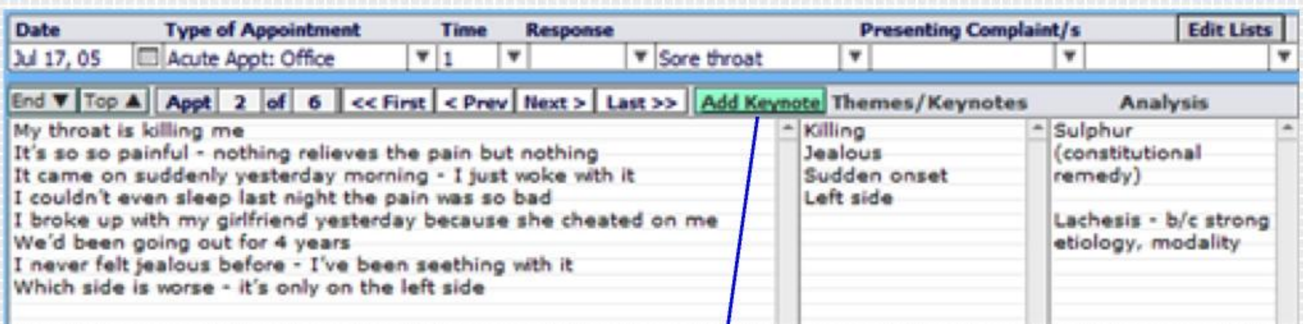
Take your final lists/groups from Themes & Keynotes and translate into rubrics.

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.

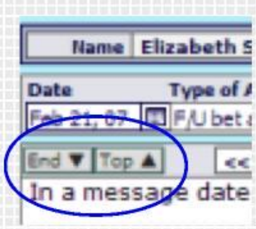


Entering a Theme or Keynote into the Themes/Keynote field.

Add Keynote

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.

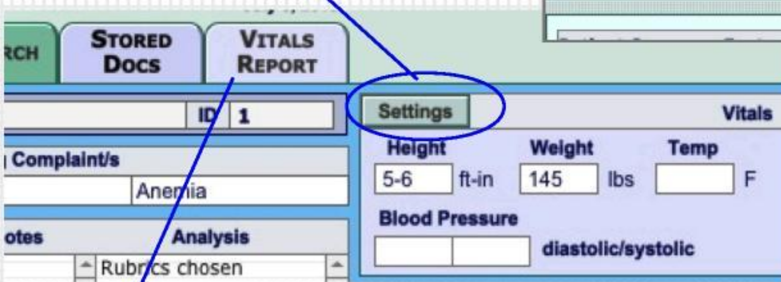


Jump to the end of a note.
This is useful if you are toggling between COMPASS and another program. When you go to another program Compass refreshes the field by going back to the top.

: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.

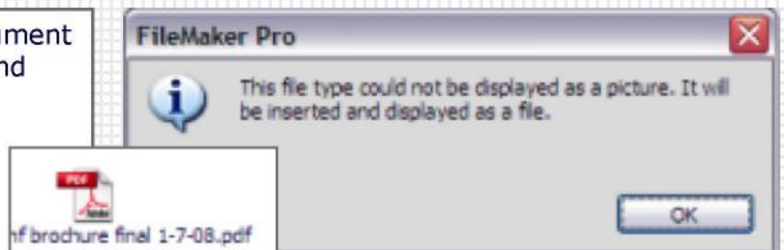


Vitals Report: Keep track of some or all Vitals and view a history that includes all appointments and any vitals recorded.

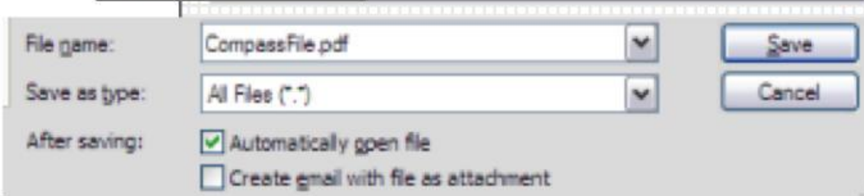
Stored Docs: A paperless office keeps all documents in one place, linked to the correct client. You can store an unlimited number of documents for each client in COMPASS including: pdfs of labs that were emailed to you or letters or forms that you scanned in manually.

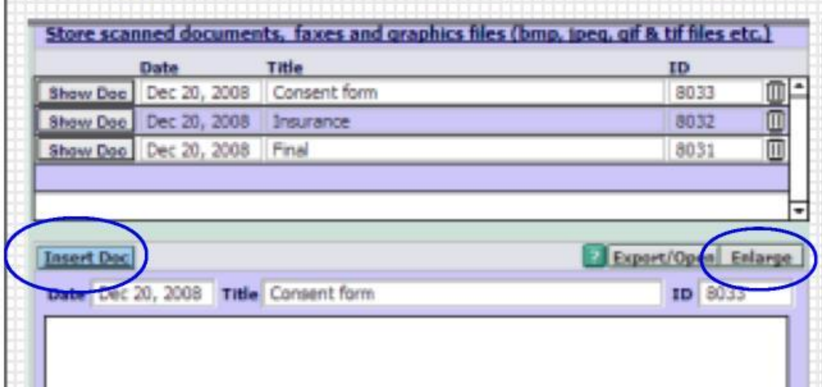
pdfs with multiple pages: the whole document is stored. These look different on Macs and PCs.

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.





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/expectoration

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:

Edit this list or insert your own

MENTAL/EMOTIONAL SX

Actively listen and observe.

Verify - Clarify - Enlarge

Ask for examples
Note off-handed comments
Be ***curious*** (ask why & how often)
Use ***open-ended questions***
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?

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?

Tell me about your childhood.
What was your nature as a child?
Tell me about your relationships, work, housing, your life situation.

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 ++

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).

Edit this list or insert your own

GENERAL SX

Energy: in general? best/worst times?

Sleep and Dreams
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?

Weather/Temperature Environment
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.

Perspiration
Odor. Quality/quantity. Location

Appetite/Thirst
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?)

Miscellaneous
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

Edit this list or insert your own

REVIEW OF SYSTEMS

Head: Pain. Eruptions. Hair. Dizziness.

Eyes: Vision. Infections. Itching. Pain. Discharges. Photophobia, lachrymation.

Ears: Hearing. Noises. Wax. Eruptions. Infections. Pain. Discharges.

Nose: Sense of smell. Nosebleeds. Pain. Allergies. Discharges: mucus; sinuses ++

Mouth: Tastes, Odor. Infections. Drooling.

Gums: Bleeding, Pain. Canker sores.

Teeth: Dentition. Cavities. Pain.

Throat: Infections. Glands. Swallowing. Constriction. Voice.

Stomach: Nausea/vomiting. Knots/anxiety.

Abdomen: Sensitivity. Inner organs. Pain.

Digestion: Gas. Bloating. Pain.

Bowels: Constipation. Diarrhea. Pain.

Stool: color/size; blood/mucus.

Hemorrhoids: internal/external.

Menses: Regularity. Flow. Pain. Clots. PMS.

Chest. Palps. Tightness. Lumps. Pain.

Cough/Respiration/Expect.

Genital/Urinary: UTIs, STDs. Discharges. Pain. Warts. Sexual energy in general.
F: Pregnancies/abortions/births.
M: Prostate

Musculoskeletal/Neuro: Pain, stiffness, swelling, numbness, tingling: neck, back, joints of arms/legs. Cramps. Varicosities, Chilblains. Restlessness. Tremors.

Skin: Dry/oily. Cracks. Hairy. Nails Eruptions: itching, flaking etc. Wound healing. Keloids. Bruising. Warts. Moles.

Fever: Heat. Chills. Perspiration.

Sleep. Position. Covers. Sweat. Teeth

:Checkbook Help:

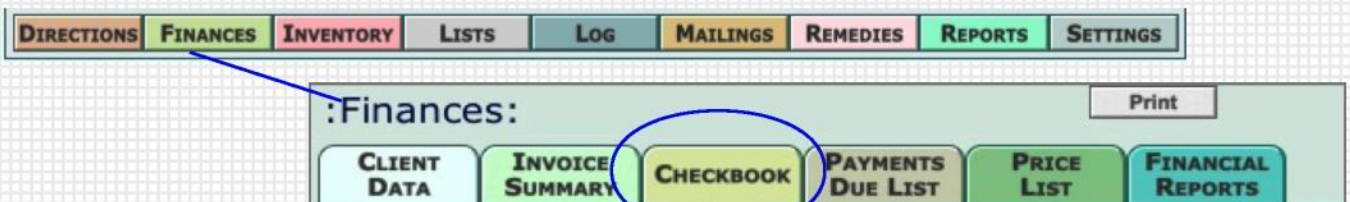
A Small Business Dream Come True!
This is the easiest 'checkbook' you'll ever balance. Enter all banking transactions - including payments & deposits - and reconcile them when your statements arrive.

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.

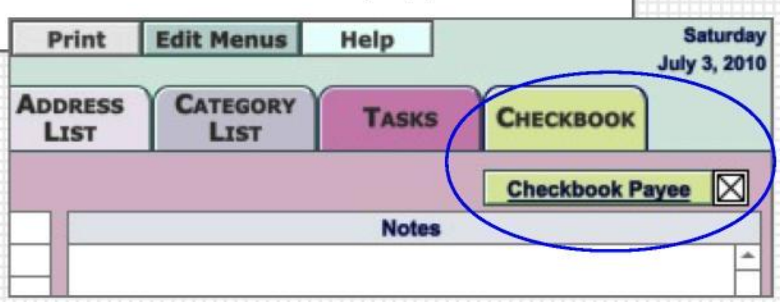


You can get to your Checkbook from Client Data, Invoices and the Address Book.
From Client Data click on **Finances** (bottom buttons bar on the Client Data screen) and then select the **Checkbook** tab. From **Invoices** and **Address Book** click on the Checkbook tab.

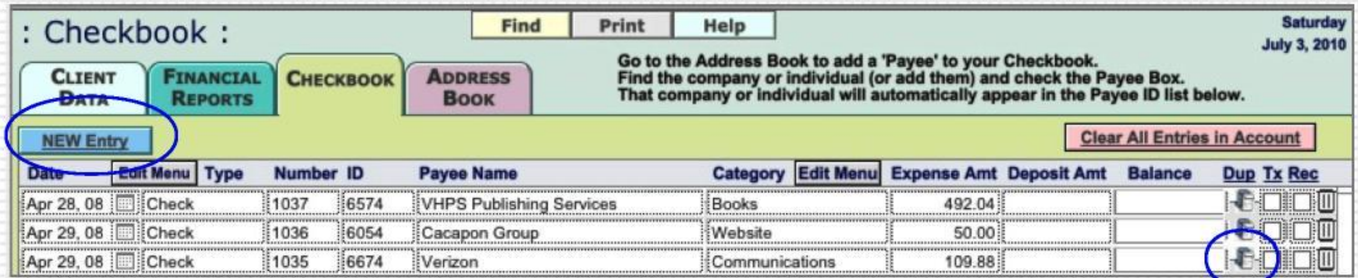
First time users: add an opening balance to start with. Although you don't have to do this your balances will be more accurate.

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.

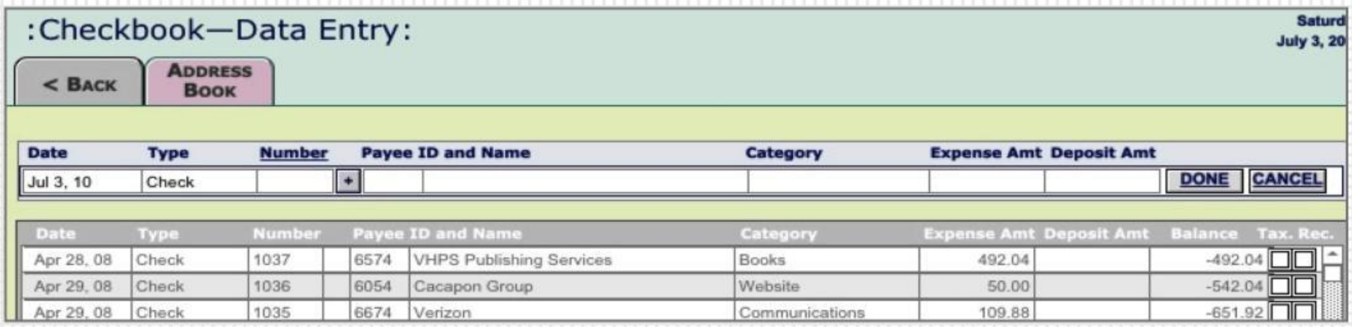


:Checkbook Help—Features:



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.



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.

Clear All Entries in Account

Use this button with Great Care
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:

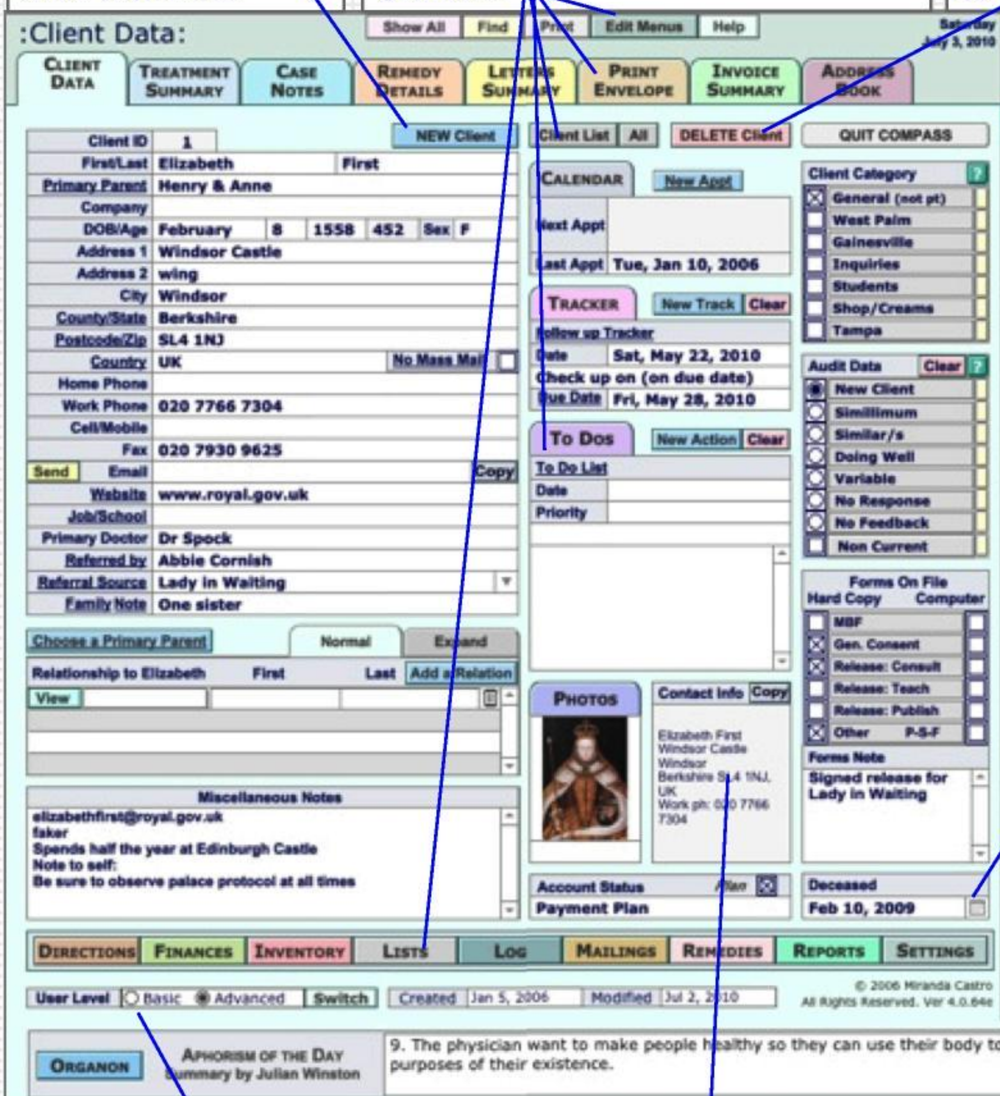
Think of Client Data as your **home page**, the **center** or **hub** of your paperless office. It contains contact and summary information for all your clients and is **the most important layout in COMPASS.** There's a lot going on at this screen. On purpose. You will quickly appreciating having so 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.**



NOTEPAD

You'll find this notepad at nearly every screen.

Use it as you would a pad on your real desk - and jot voice mails, notes, 'to-dos' or thoughts that come into your head at any time.

Make it Yours!

Click the Settings button and work your way through each settings screen. See also Settings Help.

Make it Yours!

Click the Settings button and work your way through each settings screen. See also Settings Help.

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.

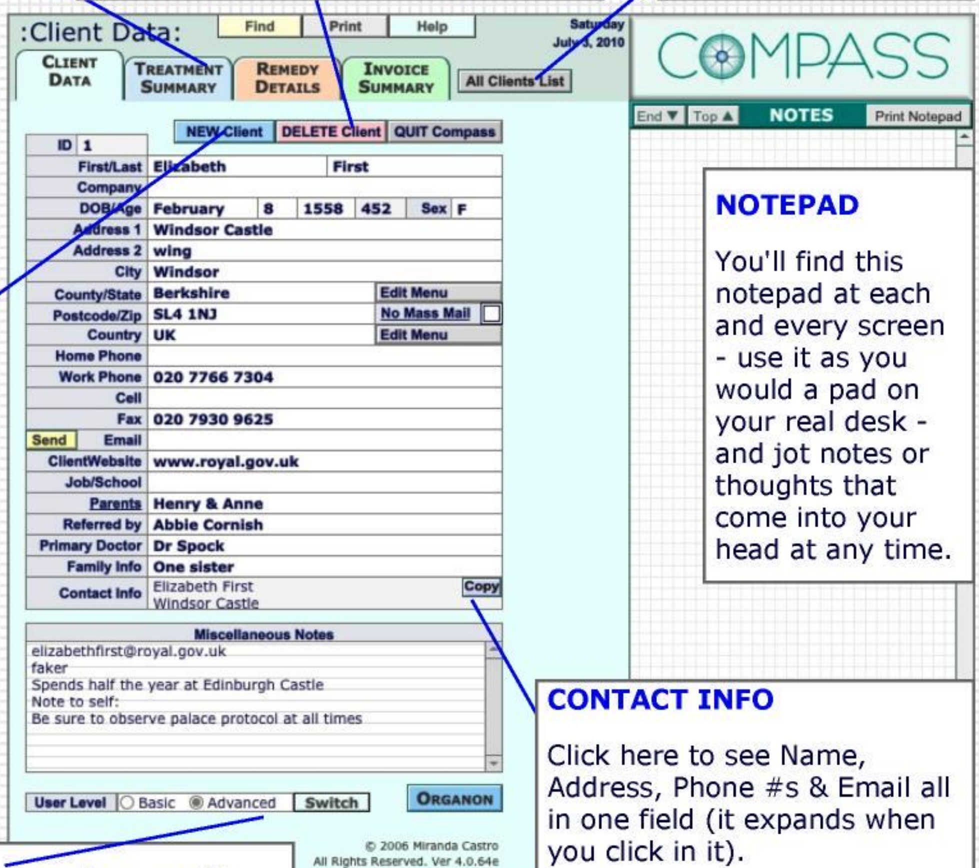
Client Data is the one tab common to all screens - you can always come back here!

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.

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.

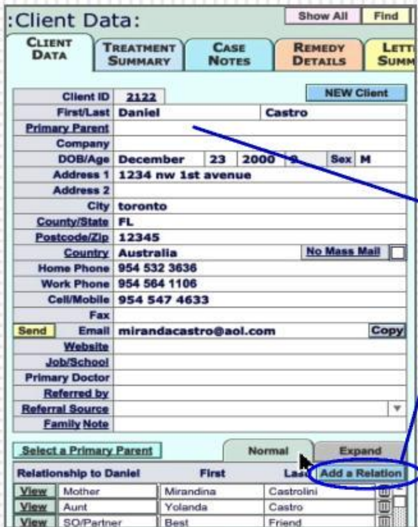
CONTACT INFO

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!

:Client Data Help—Family Data:



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

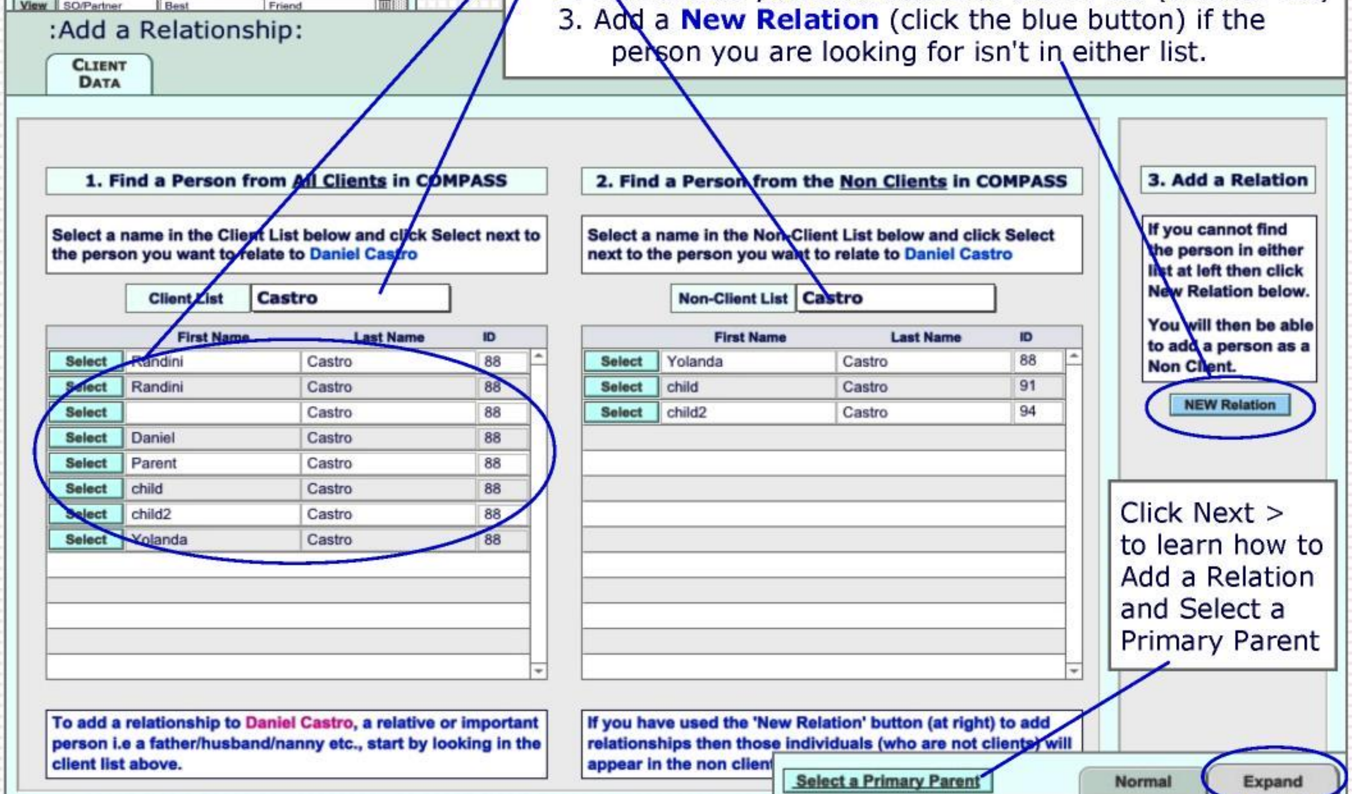
You can only add relationships at the **Advanced** screen.

Daniel Castro (at left) does not yet have a primary parent yet even through 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.

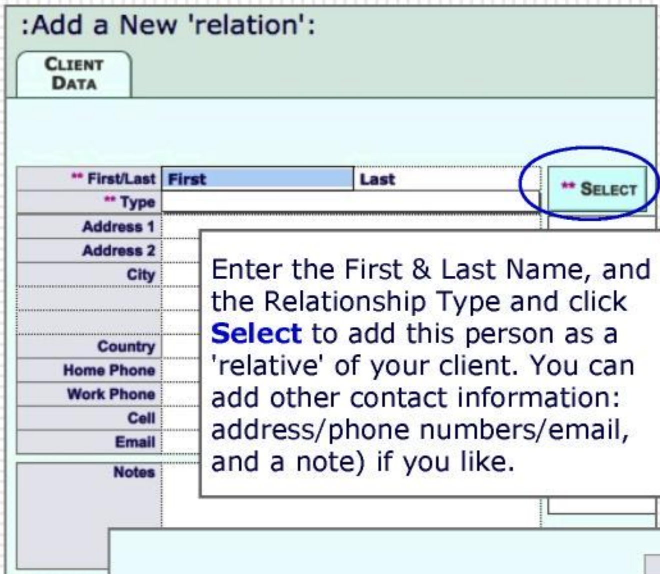


Click Next > to learn how to Add a Relation and Select a Primary Parent

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).

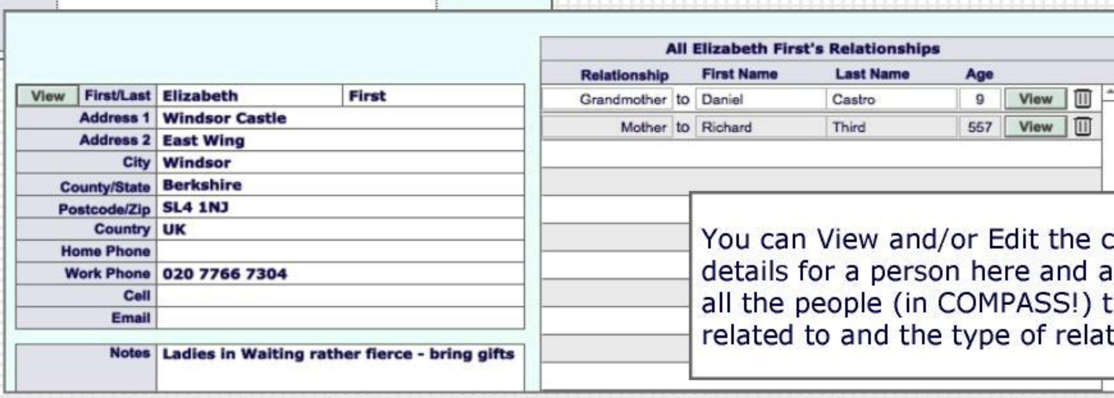
:Client Data Help—Family Data 2:



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.

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

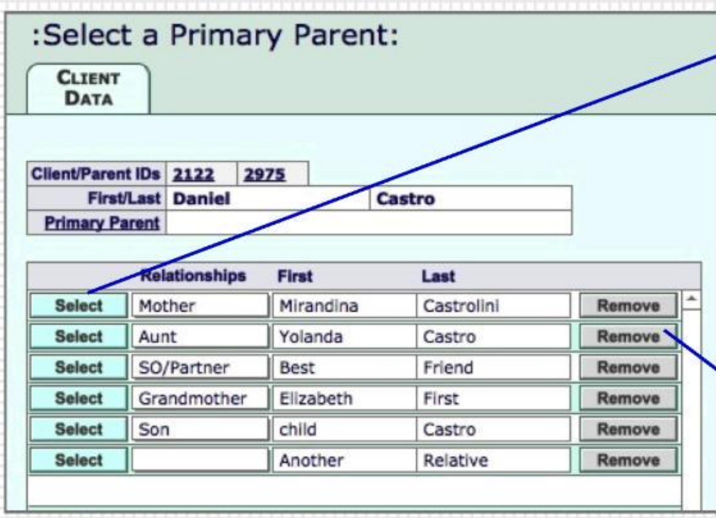
A visible scroll bar lets you know that there are additional relatives ... click the Expand tab to view up to 10 relatives at a time and/or use the scroll bar to view more.



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.



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.

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:

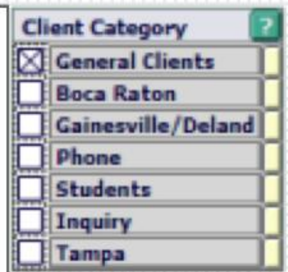
Client Category

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.



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.

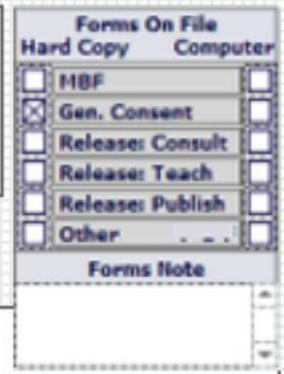
Re-evaluate the category selected after each appointment.

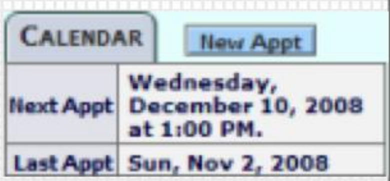
Check non-current if a client has moved, is seeing another practitioner or is deceased.

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.

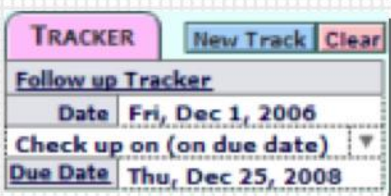
Each one of these headers is customizable - change them to meet the needs of your office. There's a field at the bottom to add a note.





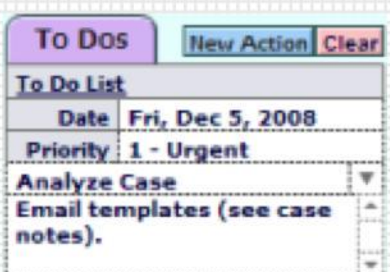
Calendar

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.



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 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 | Find | Print | Edit Menus | Help

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.

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 avilable at the screen or section you are working in.

NEW Client | Client List | DELETE Client | QUIT Compass

The **New Client Wizard** makes sure a dupli-cate 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.

NEW | Clear | Send | Copy | Edit Menus

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

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.

Miscellaneous Notes

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

TREATMENT SUMMARY: Summary lists: all visits; all prescriptions. Create new case notes and new prescriptions. Access the Appointment Timer.

CASE NOTES: Go to the current client's ***most recent*** visit.

REMEDY DETAILS: Go to this client's ***most recent*** remedy given.

LETTERS SUMMARY: Summary list: letters/emails. Create a new letter or email.

PRINT ENVELOPE: Print a single envelope quickly and easily for one or more clients.

INVOICE SUMMARY: 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).

ADDRESS BOOK: 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.

NEW Client	Client List	All	DELETE Client	QUIT COMPASS

TOP BUTTONS

NEW CLIENT: Create a new client. COMPASS checks for existing client with same name.

CLIENT LIST: View some clients or a list of **ALL** clients.

DELETE CLIENT: Delete with GREAT CAUTION. Deleted data can NEVER be recovered.

QUIT COMPASS: You'll be reminded to **Back Up**. Please do not ignore this message.

DIRECTIONS	FINANCES	INVENTORY	LISTS	LOG	MAILINGS	REMEDIES	REPORTS	SETTINGS

BOTTOM BUTTONS

DIRECTIONS: Keep directions to a client's home for house calls.

FINANCES: From Finances go to **Checkbook, Reports, Price List** or **Payments Due List**

INVENTORY: Keep track of your remedies in stock.

LISTS: **Referrals**, **Appointment Summary**, **Locum Data**, a variety of **Client Lists**.

MAILINGS: Send a mailing (**Letters** or **Emails**) to a group or all of your clients.

REMEDIES: Your own **Materia Medica**. Keep notes/photos from observations/cured cases. Insert words of wisdom from favorite teachers, books, seminars and conferences.

REPORTS: including: **Age & Sex** report, **Outcomes Audit** (the heart of Compass), **Remedy Audits**, **Complaints Report** & **Research**, **Well Being** and **VAS Research**.

DAILY LOG: A list of the clients you worked with today - or yesterday - or the last week.

SETTINGS: Customize everything.

CALENDAR	TRACKER	TO DOS	PHOTOS	ORGANON

MISCELLANEOUS

CALENDAR: Appointments are linked to Clients only (not to contacts in Address book).

TRACKER: Keep track of clients who haven't followed up. Find upcoming appointments.

TO DOs: Action Items - your 'daily lists' of To Dos - one per client.

PHOTOS: A client's photo album - 6 photos per client.

ORGANON: Get a daily dose of inspiration. Or more ... much more - click and see!

: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:

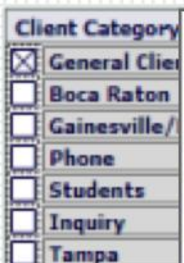
- **Contact details** including **Category**
- **Appointment snapshot -** the last appt and the upcoming appt if scheduled
- **Audit Data check/entry**: check this after each and every appointment.
- **Forms on file**
- **To Dos**
- **Follow Up Tracker**
- **Photo:** a thumbnail of photo number 1 from 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:

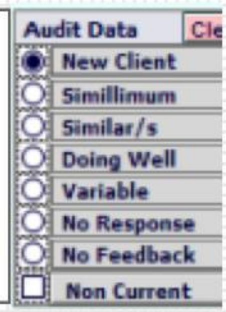
- Create a **New Case Note** in Treatment Summary before viewing a client's Case Note
- Create a **New Remedy** in Treatment Summary before viewing a client's Remedy Details
- Create a **New Invoice** in Invoice Summary before viewing a client's Invoice/s or Statement

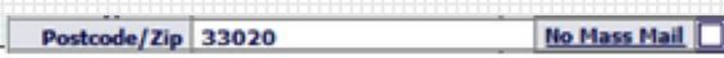


Top Tips

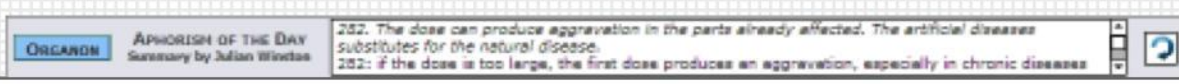
Check a Client Category Box **each and every** time you enter a new client - even inquiries. Make sure everyone is categorized.

Check an Audit Category after **each and every** appointment with patients. Check New Client after the first appointment and check/reassess after every single follow up. If you leave it you'll have to stop and think first. It will only take a couple of seconds and make your practice audits satisfyingly easy.





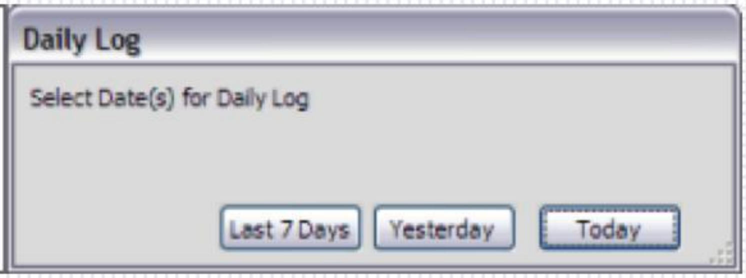
No Mass Mail - check this box to automatically exclude a client from all future mass mailings
This is useful for non-current clients, the children of parents who are clients already, for families with more than one child, clients who have requested that you not contact them and so on.



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.

LOG

Go straight to the Log from **Client Data** (bottom buttons).
Check for today or yesterday's or last week's log. Use it regularly to make sure no clients fall through your administration cracks.



Uses
Check activities at the end of the day (for that day's activities), at the beginning of the next day (for yesterday's activities) or at the beginning or end of a week. You'll be surprised to find the odd client slipping through your (action) net: including clients who said they'd be in touch, kids with acute coughs, a client who asked for an invoice but you got distracted and forgot to make a note of their request, clients you had forgotten to charge for an appointment. Checking the log on a daily basis will jog your memory.

Check the **Daily Log** for the following activities:
- Newly added Clients
- Newly added Case Notes - or any additions/changes to current Case Notes.
- Newly added Invoices - or any additions/changes including payments to current Invoices
- Newly added Remedies - or any additions/changes to current Remedies.

Click on the pink headers to view by most recent appointment, invoice or remedy etc.

	First Name	Last Name	Parents	Company	Date Created	Date of Appt.	Date of Invoice	Date of Remedy
View	Nick	Angelo	Marilyn Angelo		Wed, 12 Mar 03	Thu, 11 Sep 08		Sat, 15 May 04
View	Miranda	Castro			Wed, 9 Jul 03	Thu, 4 Dec 08		Wed, 9 Jul 03
View	Miranda	Castro	Fidel Castro		Wed, 23 Jul 03	Thu, 4 Dec 08		Sat, 23 Oct 04
View	Angela	Angelo	Jim Hoyt		Tue, 20 Jan 04	Thu, 22 Sep 05		Wed, 21 Jan 04
View	Jim	Hoyt		Cacapon Group	Wed, 21 Jan 04	Tue, 27 Dec 05	Tue, 2 Dec 08	Wed, 21 Jan 04
View	Odessa	Hoyt	Jim and Jane Hoyt	Cacapon Group	Thu, 26 Aug 04	Sat, 31 Dec 05		
View	Richard	Third			Sun, 1 Jan 06	Thu, 5 Jan 06		Tue, 3 Jan 06
View	Miranda	Castro			Sat, 29 Jul 06	Wed, 3 Dec 08		Sun, 30 Sep 07

Click View to go to this Client at the Client Data screen.

The date this client was first added to COMPASS.

If you create a new case note or write anything (even a brief note) today or yesterday or in the past week.

If you add an invoice or an invoice is paid today, yesterday or in the past week.

If you give a new remedy to a client or work in any of their remedies today, yesterday or in the past week.

:Directions Help:

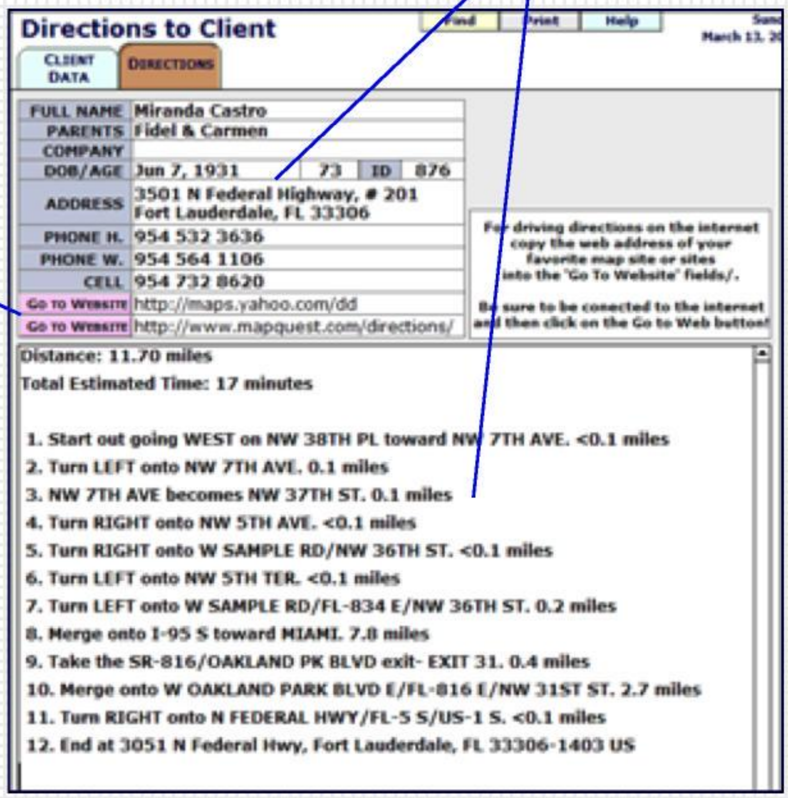
This layout allows you to 'file' the directions for any client in one place where they are always easily accessible. This is especially valuable for those who do house calls. The same feature is available in the address book! Save time by looking it up once only!

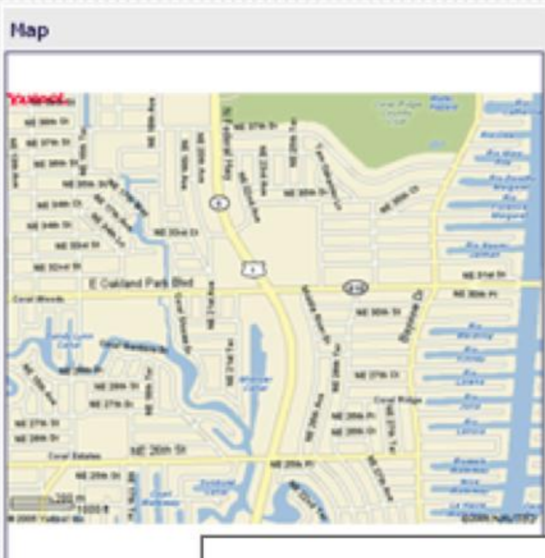
The following important information is automatically entered from Client Data:
- name and DOB
- address
- all phone numbers.

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.

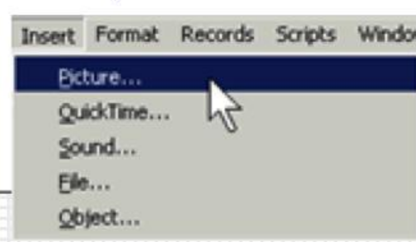
Make sure you are online when you click on the headers.





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.

Email Signature

MIRANDA CASTRO, *Homeopathic Consultant*
Mailing: 4474 NW 1st Ave, Gainesville, F32607
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
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:

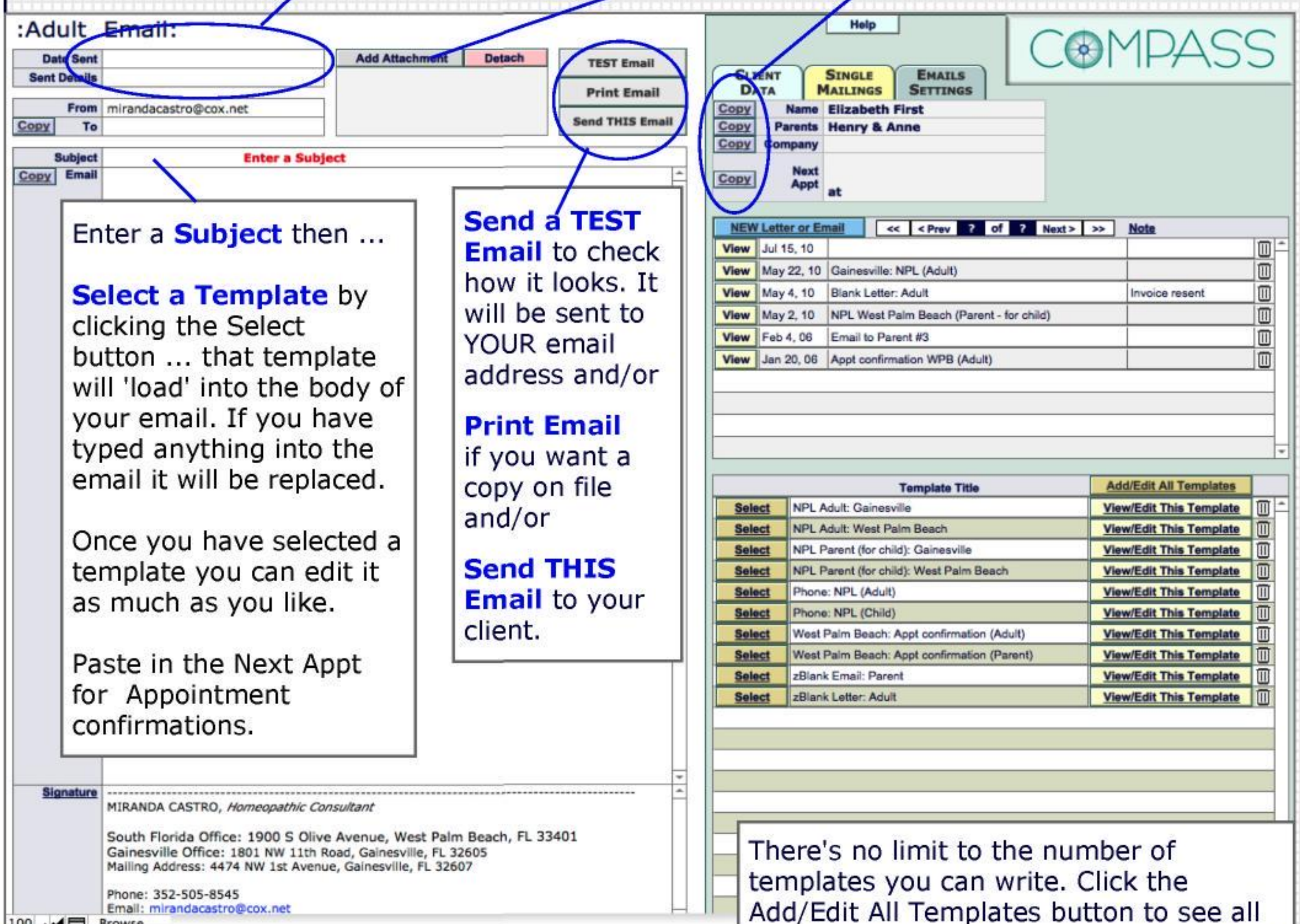
From Client Data click the **Send** button next to a client's email or the **Letters Summary** tab and select **New Letter or Email**. Either way you'll get a message asking if you want to create a new letter or email, then checking whether you want to write to an Adult or the client's Parent.

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

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.



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.

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.

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.

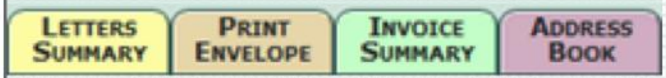
:Internet Service Providers:

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
Cinncinnati 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
Spryne: 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:

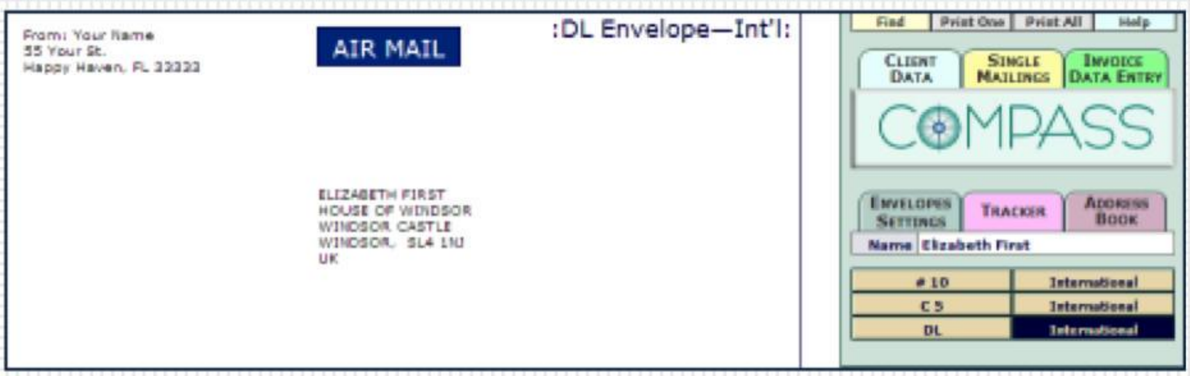
You'll find Envelope tabs or buttons in all the obvious places ... at Client Data, the Letters Summary screen, Invoice Data Entry, Follow up Tracker, Address Book.



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

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'.

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.



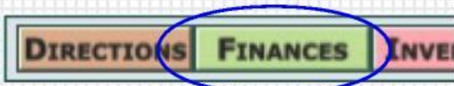
Notes:

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:



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.

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

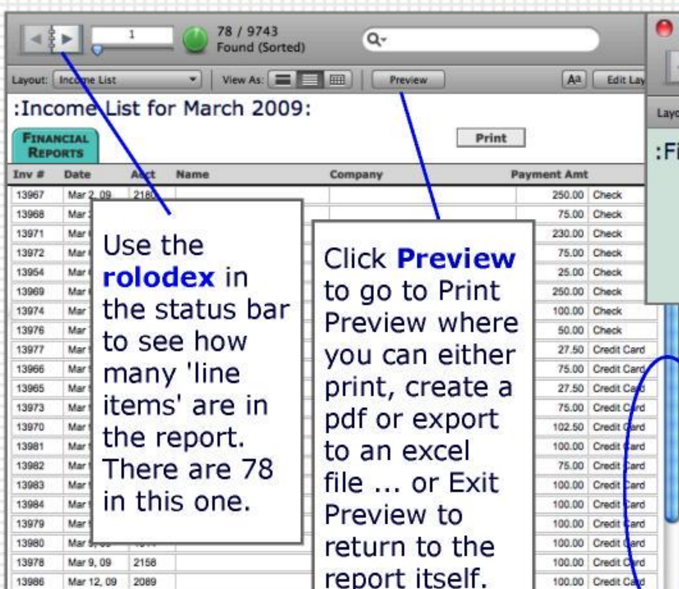
Income Lists report on invoices that have been paid.

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.

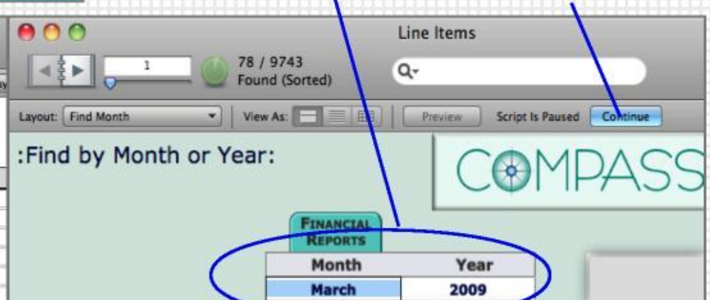
There is also a **ledger** that lists all transactions (income & expense) and a **custom search** facility.

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**.



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.

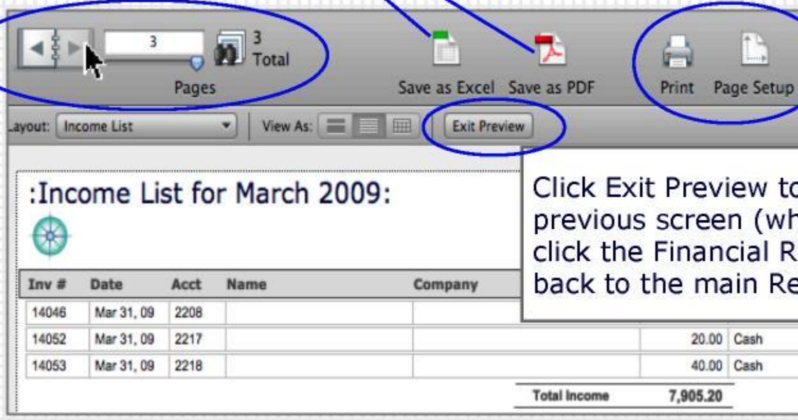


Use the **scroll bar** (right side) to scroll through long reports quickly and to view the bottom line!

: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.



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

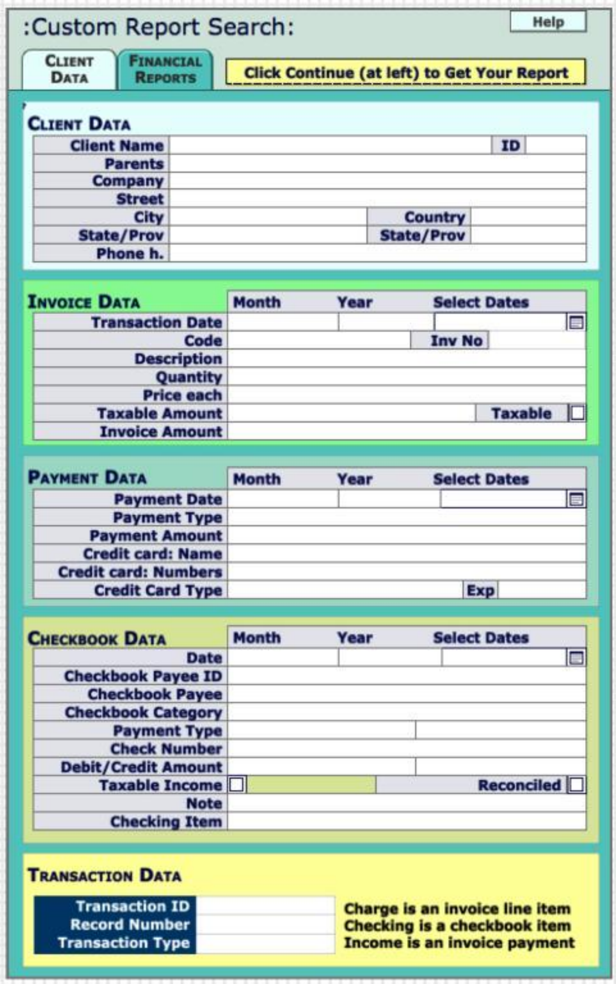
Custom Searches are an Advanced Feature.

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.

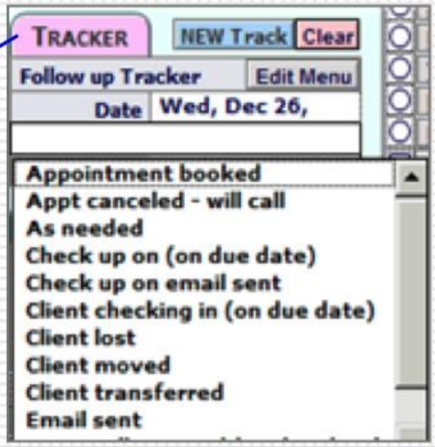


:Follow-up Tracker Help:

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.

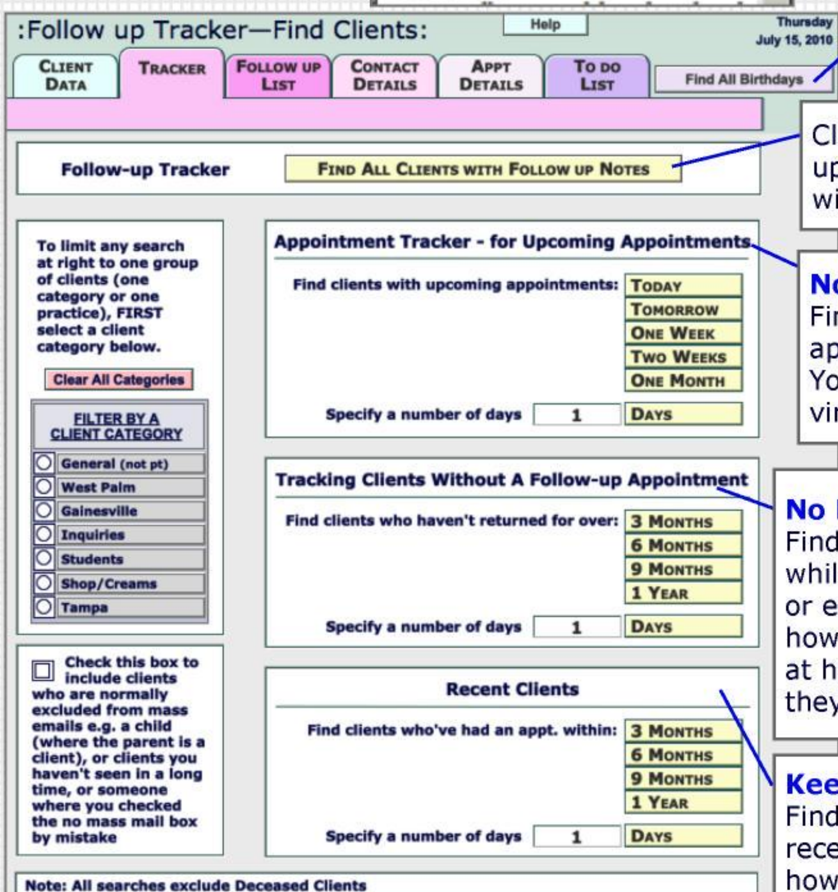
Click on the Tracker tab to go to the Follow up Tracker screen with multiple searching capabilities.



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.



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.

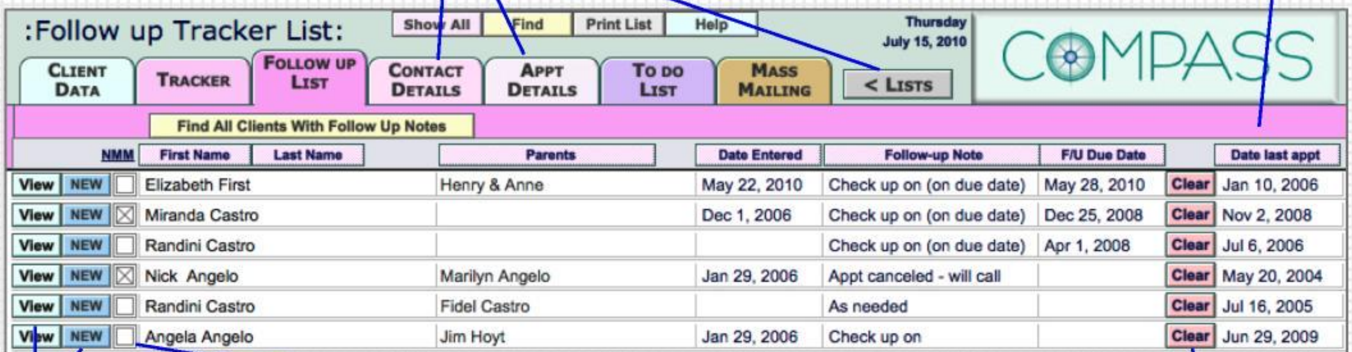
Limit a search to a certain practice or group of clients.
Check the list at the next screen and then go to the Mass Mailing to send out emails or letters.

: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.



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

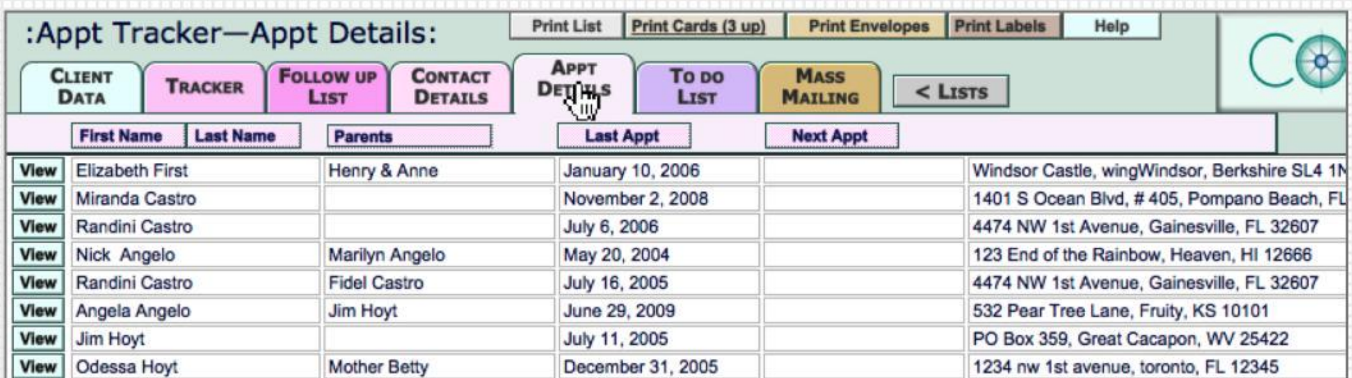
Click **New** to add a Follow up Note - the date inserts and the note menu pops down.

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.

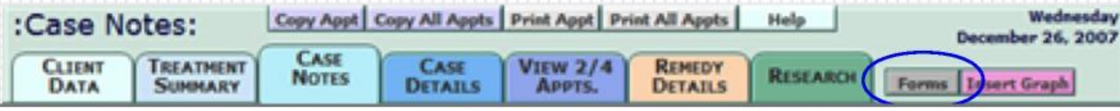
Click the Clear button to remove Follow up Tracker data from each of the three fields if following up is no longer relevant or necessary.



	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:

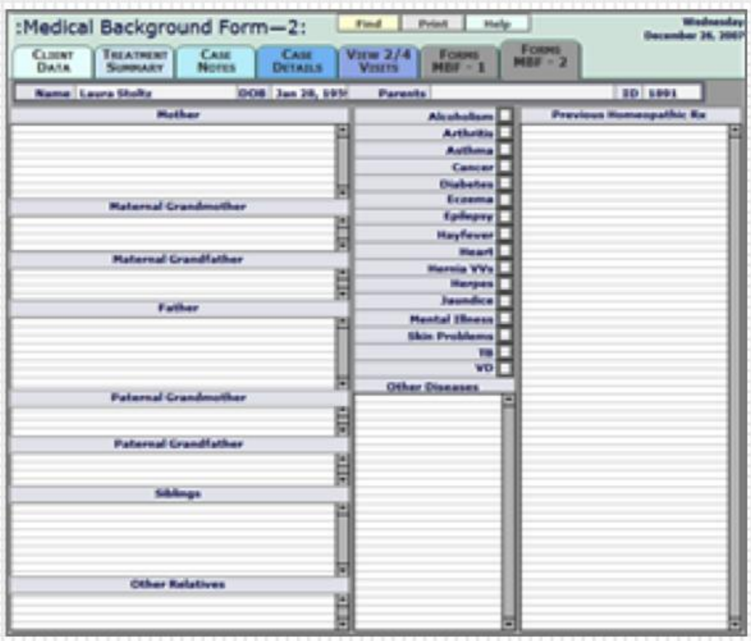


These 'forms' are based on the medical background sheets I send to clients before their first appointment. This part of compass is not fully developed yet and so you may wish to think twice about using it. If you do use it please feel free to let me know how and what improvements you would like to see.

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.

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.



:Inventory Help:

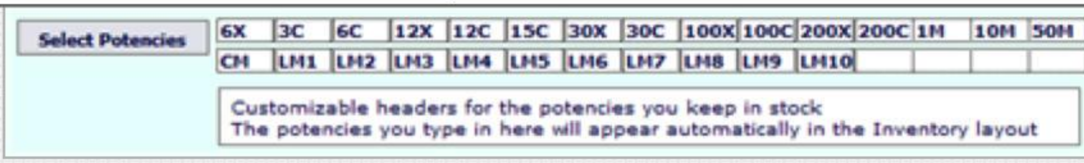
FINANCES | INVENTORY | LISTS

Inventory

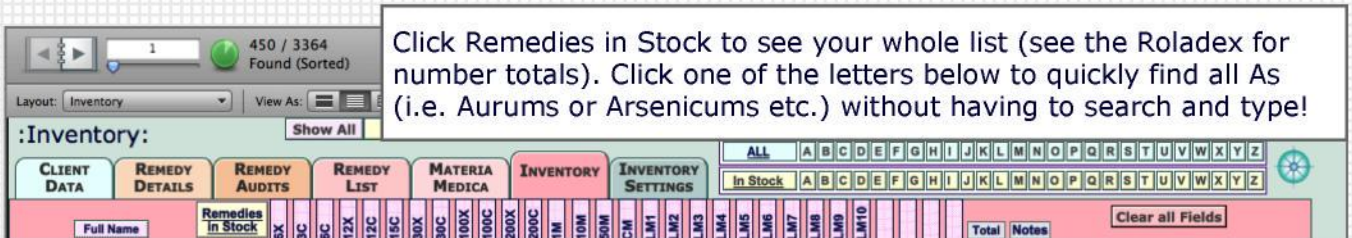
This inventory is designed to keep track of your personal stock cupboard ... of the remedies you have available/in stock. Get to it from Client Data (bottom buttons) or from Remedy Details (tab)

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.



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!



	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	
Abies-n.	Abies nigra	☒			1		1			1																			3		Clear
Abrot.	Abrotanum	☒	1												1														2		Clear
Absin.	Absinthium	☒			1		1			1																			3		Clear
Acet-ac.	Aceticum acidum	☒			1		1			2																			4		Clear
Acon.	Aconitum napellus	☒		1	1		2	1		3				2	1	3													14		Clear
Act-sp.	Actea spicata	☒					1																						1		Clear
Adren-c.	Adrenal cortex	☒								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.

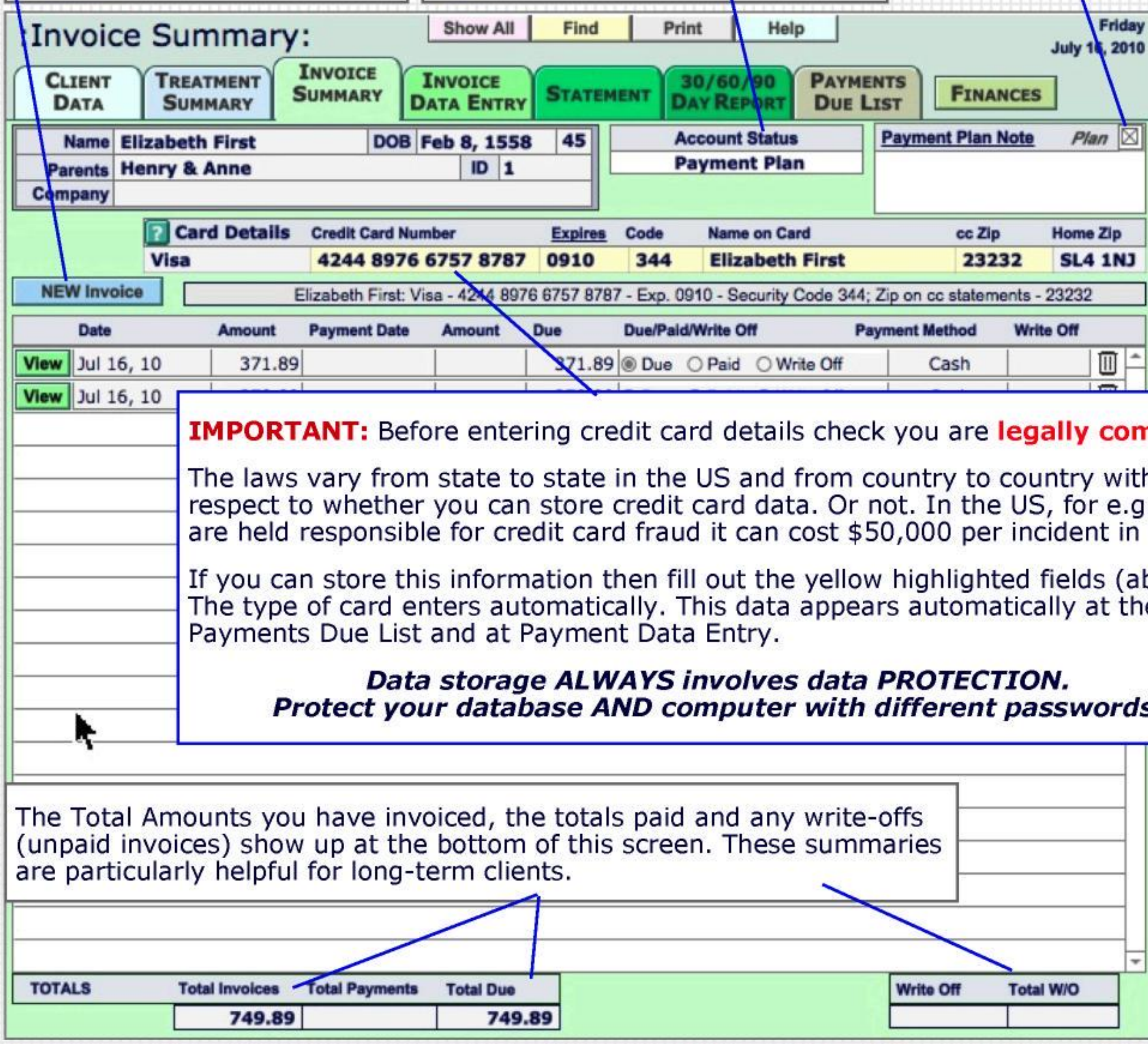
Notes: This is a basic (simple) inventory list. i.e. it is not a complex sales inventory:
  You cannot record which pharmacy your remedies are from nor the sizes of the bottles.
  The number of potencies you can keep track of are limited to 30.
The remedy list provided with COMPASS is fairly complete with nearly 3400 remedies. You may add remedies (see Materia Medica Help).

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.



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

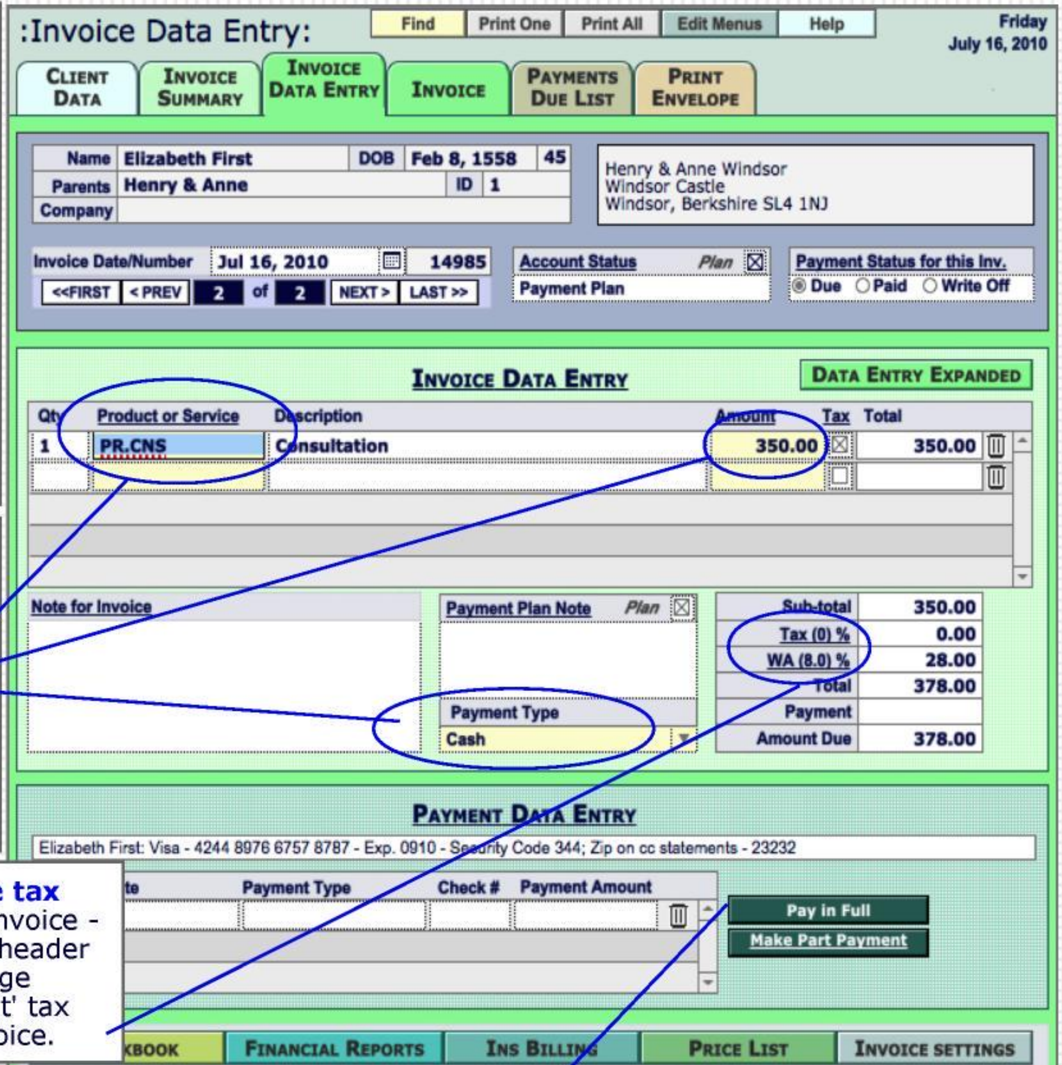
The laws vary from state to state in the US and from country to country with respect to whether you can store credit card data. Or not. In the US, for e.g., if you are held responsible for credit card fraud it can cost $50,000 per incident in fines.

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.

: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.

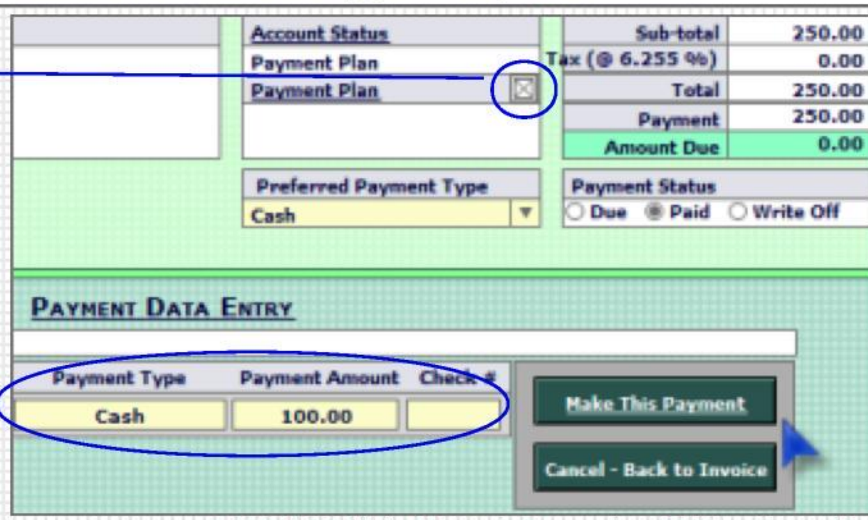
You can **change the tax rate** for a 'current' invoice - just click on the tax header to do so. It will change BACK to your 'default' tax rate for the next invoice.

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.

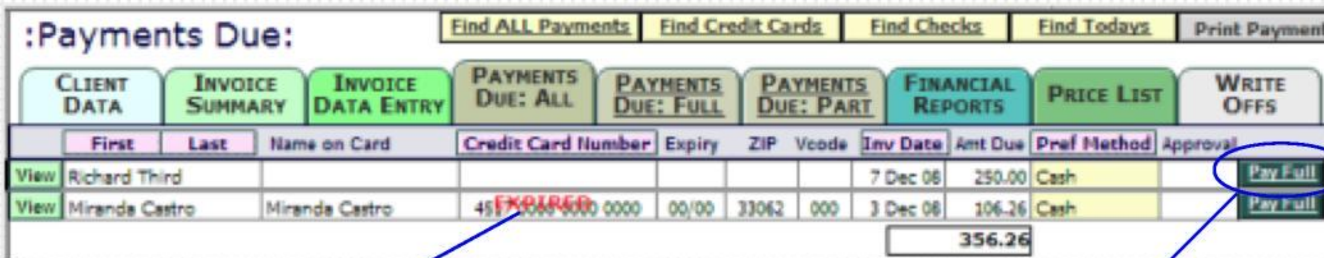
Click the **Make Part Payment** and you will be taken to another screen where you can enter the Payment Amount (and Check # if the payment is a check) and then click **Make this Payment** button.

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



:Invoices Help—Payments Due:

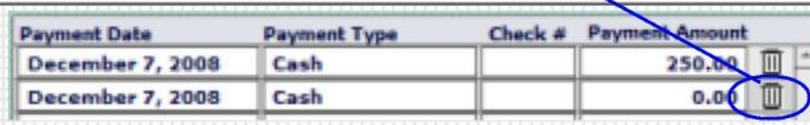
You can get to the Payments Due screen by clicking the Payments Due tab from:
- **Client Data:** click on **Finances** (bottom left of screen) and then Payments Due tab
- **Invoice Summary** or **Invoice Data Entry**: click on the Payments Due tab



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



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.

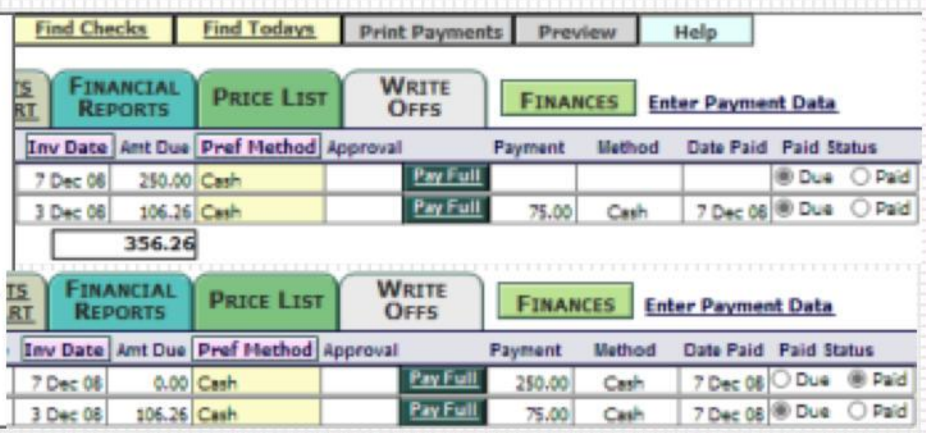
Click the **Payments Due: Part** tab to go to a screen showing only clients with payment plans and make multiple payments there (for more than one client)

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.

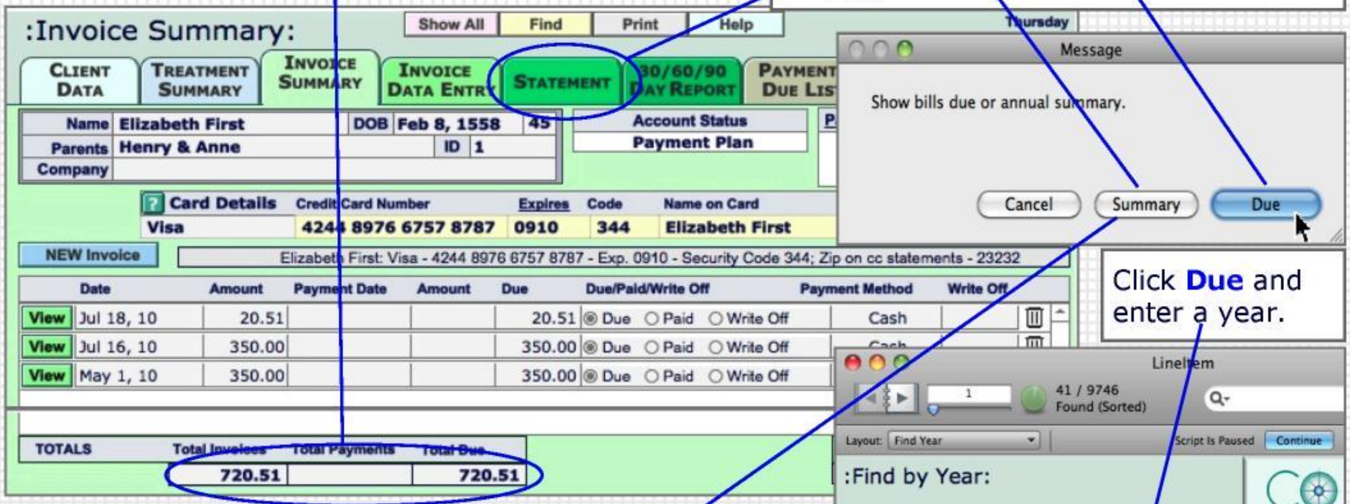
After clicking the **Pay Full** button the Amt Due becomes 0.00 and the full payment, method and today's date auto-enter to the right of the Pay Full button - the Paid Status changes from Due to Paid



:Invoices Help—Statements:

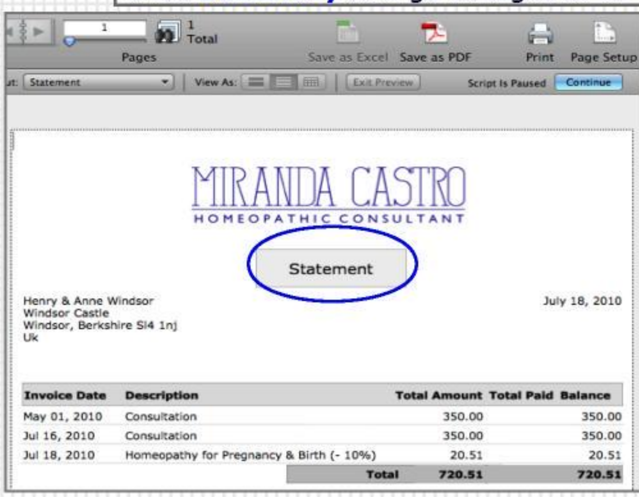
At the **Invoice Summary screen** see at a glance the totals for all Invoices, all payments made and due.

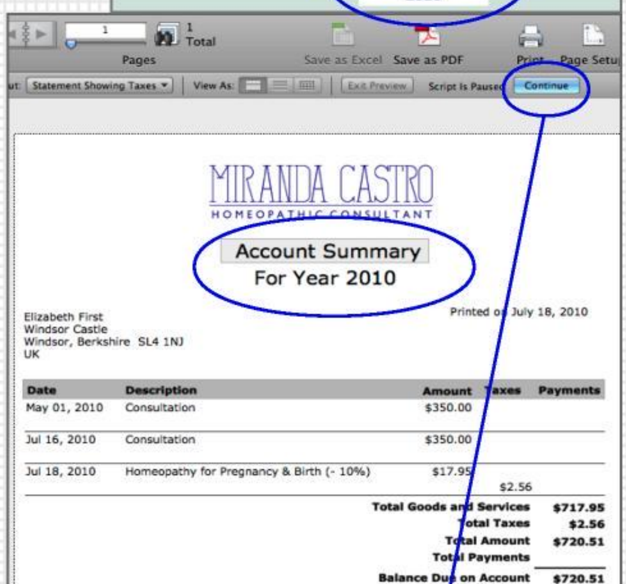
Click the **Statement** tab, then **Due** for unpaid invoices or **Summary** for paid invoices.



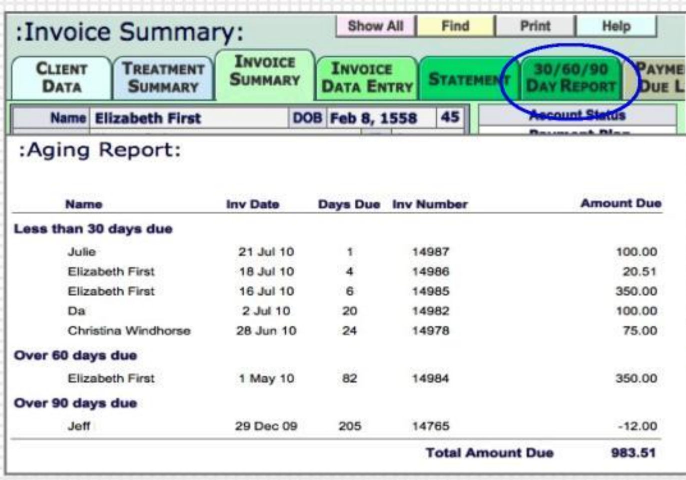
Click **Due** and enter a year.

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





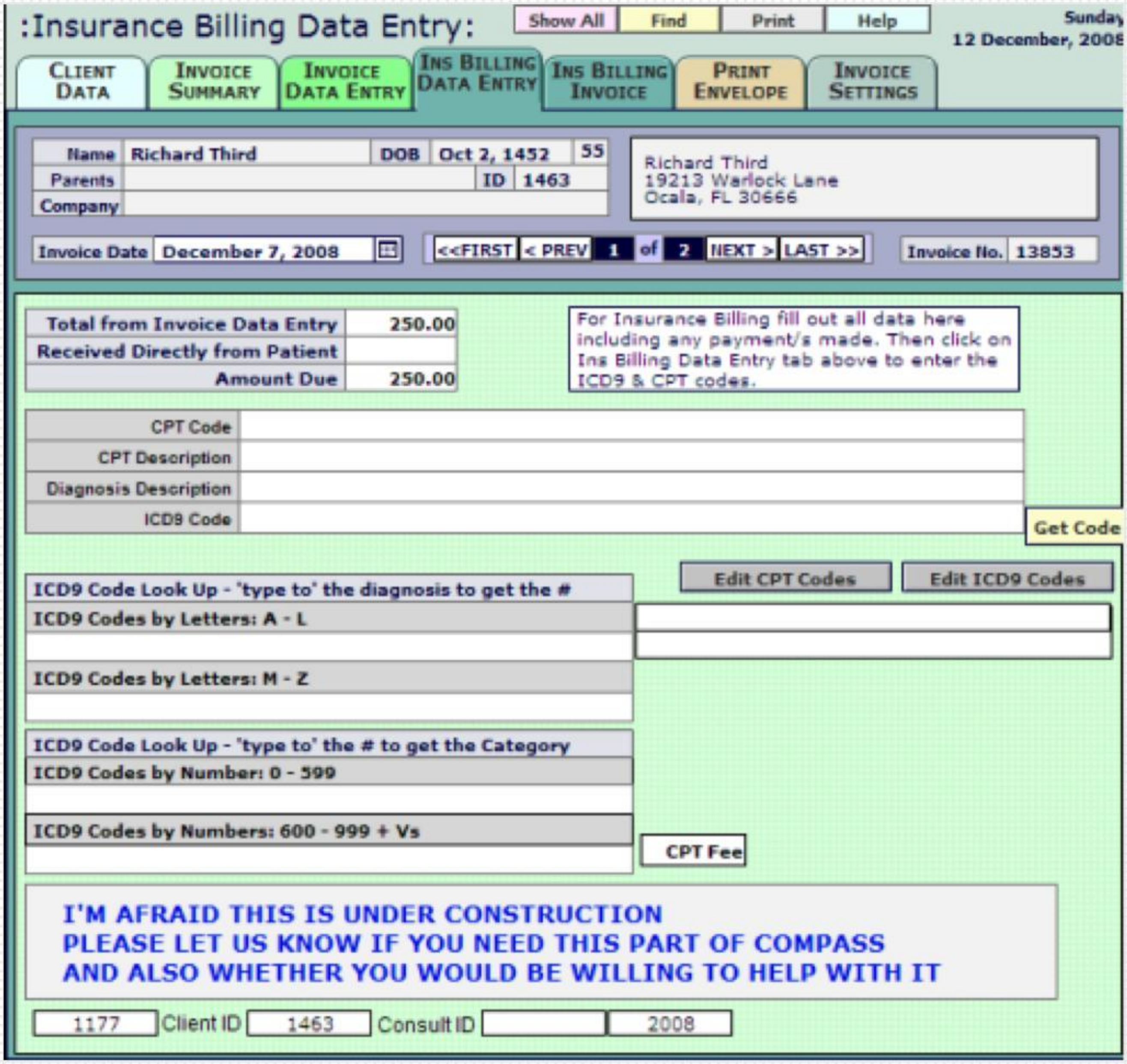
Print & Send: Select **Continue** in the status bar at top to go on to print a Statement or to cancel and return to Invoice Summary screen.



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.

:Invoices Help—Insurance Billing:

This part of COMPASS is **under construction**.
Please let us know if you need this feature.
We are also keen to know whether you would be willing to help with it.
Many thanks. The Management!



:Labels Help:

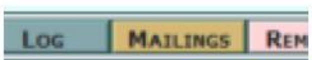
Labels are not currently available in A4 format

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.

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.

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.

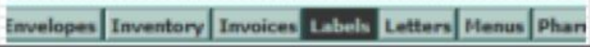
Print one (test) page on scrap paper to double check it. Then go ahead and print.

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

Preview Labels to clients

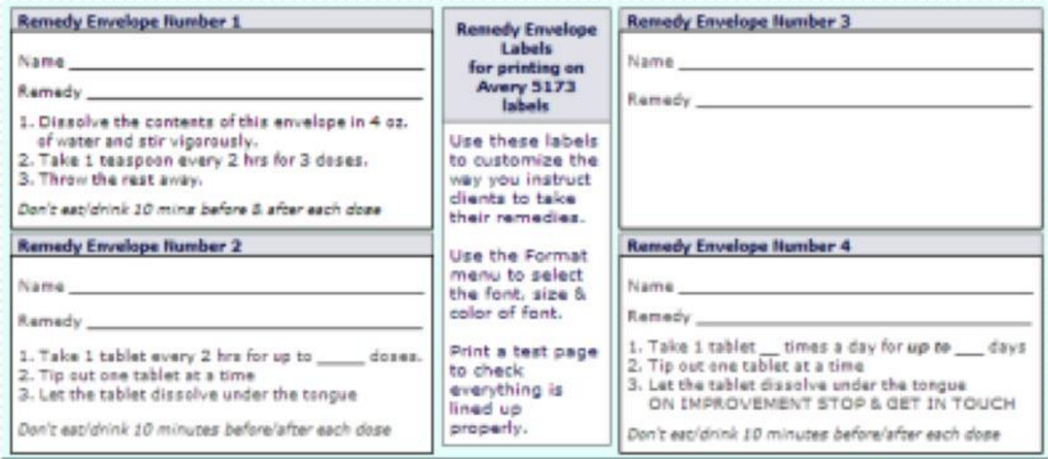
Preview your own Return Address labels

:Labels Help—Remedy Envelopes:

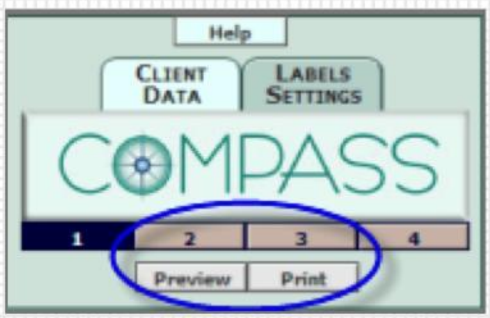


You can only get to these labels from the Labels Settings screen.
They are handy for dispensing instructions for clients to whom you give remedies out of your own stock.

These labels are US only right now.



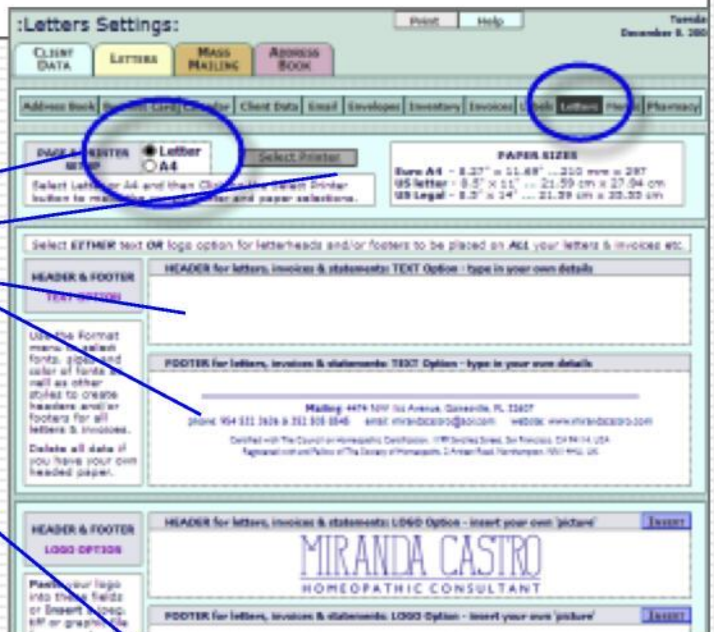
Edit the labels using the Format menu to change style, color, fonts etc. then click the appropriate button below to proceed to the preview and print screen.



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.'



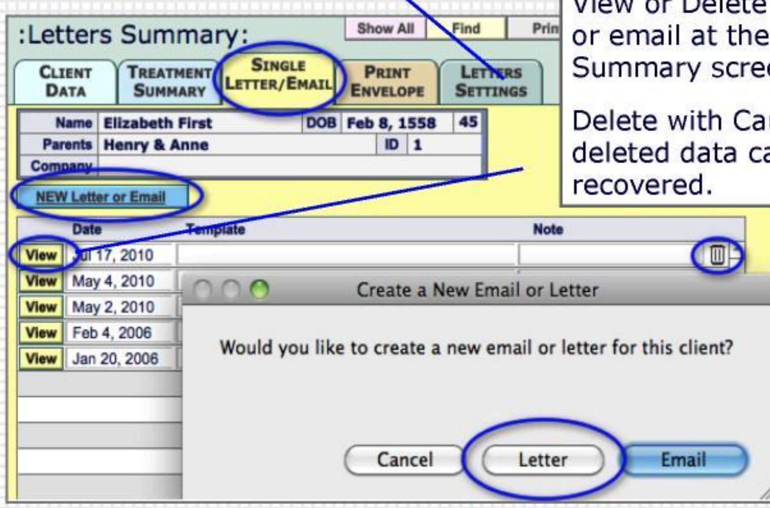
FIRST go to the **Letters Settings*** and:
1. Select your default letter size.
2. Select the **Default Printer**.
3. Create your own **header** and/or **footer**. Use the format menu to help you or import your own logo.

* 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.

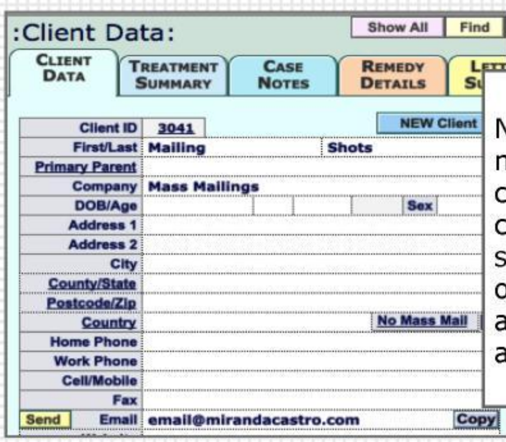
Find the client you want to write to, click on the yellow **Single Letter/Email** tab, click the **New Letter or Email** button, and select **Letter**.

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).



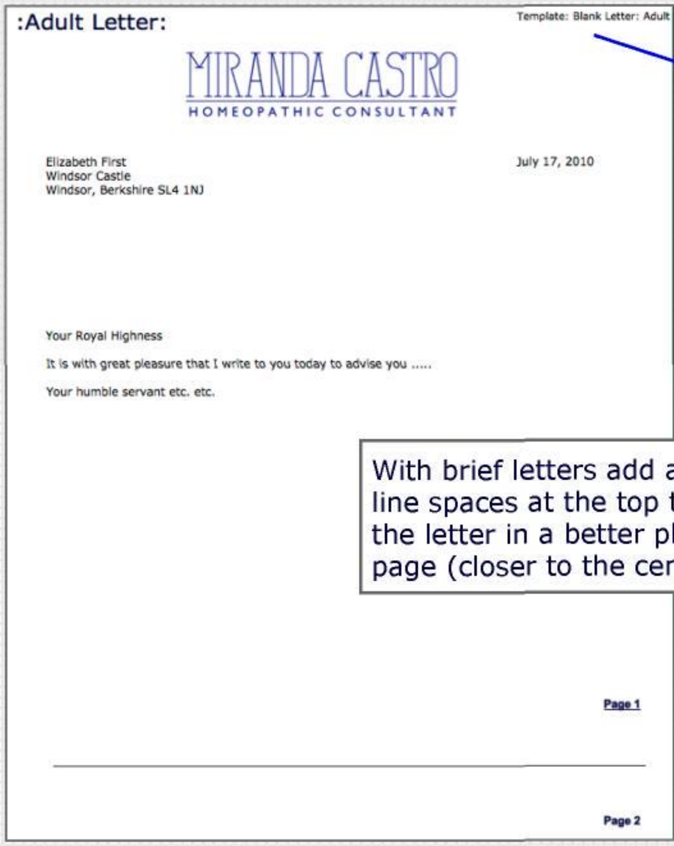
View or Delete any letter or email at the Letters Summary screen.

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:

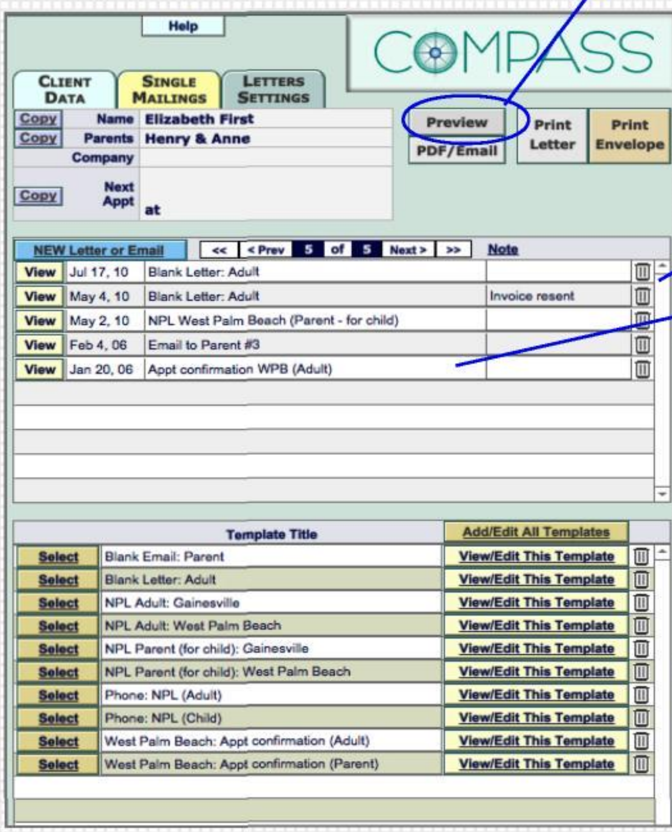


Just type away OR insert a template. Template titles appear here as well as the list.

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).



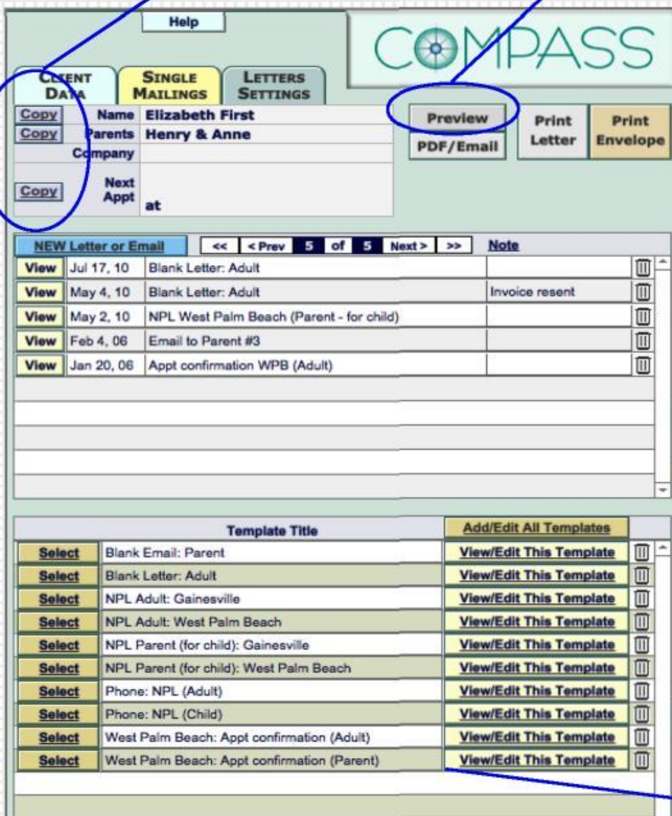
You can see all the letters/emails you have written to a client and toggle between them using the View buttons.

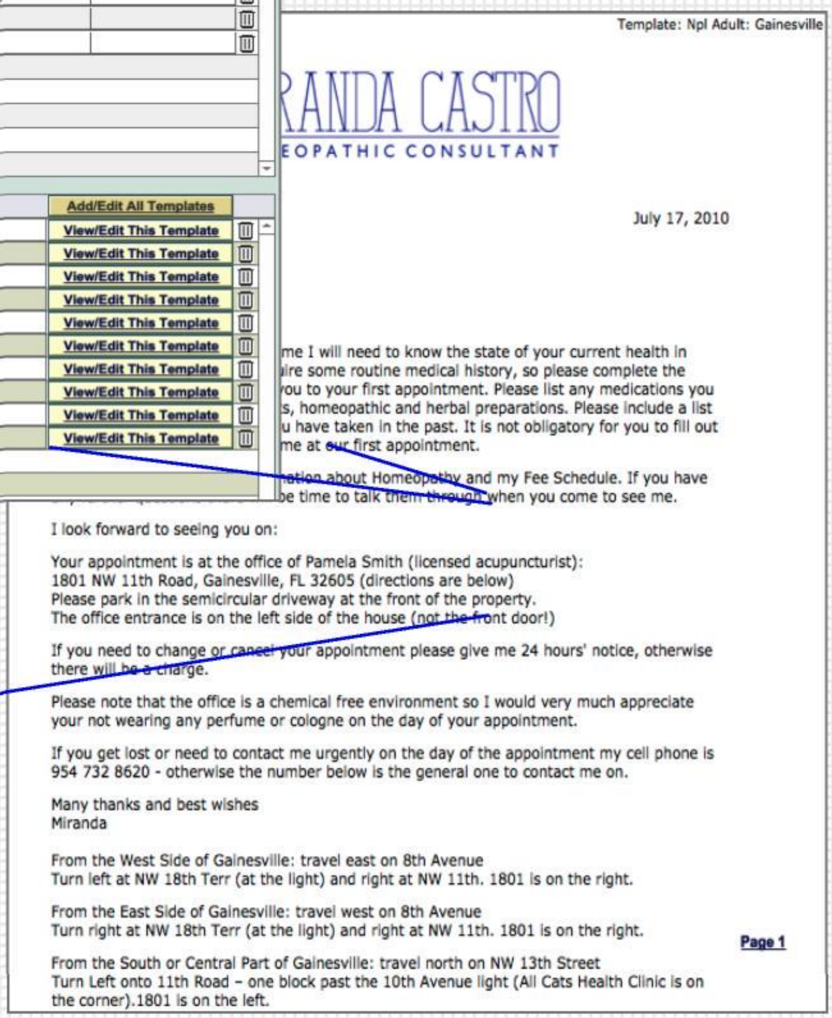
When you create a new letter the Description and Note fields are empty. Select a template and the description automatically enters. You can add a brief note if you wish.

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).





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.

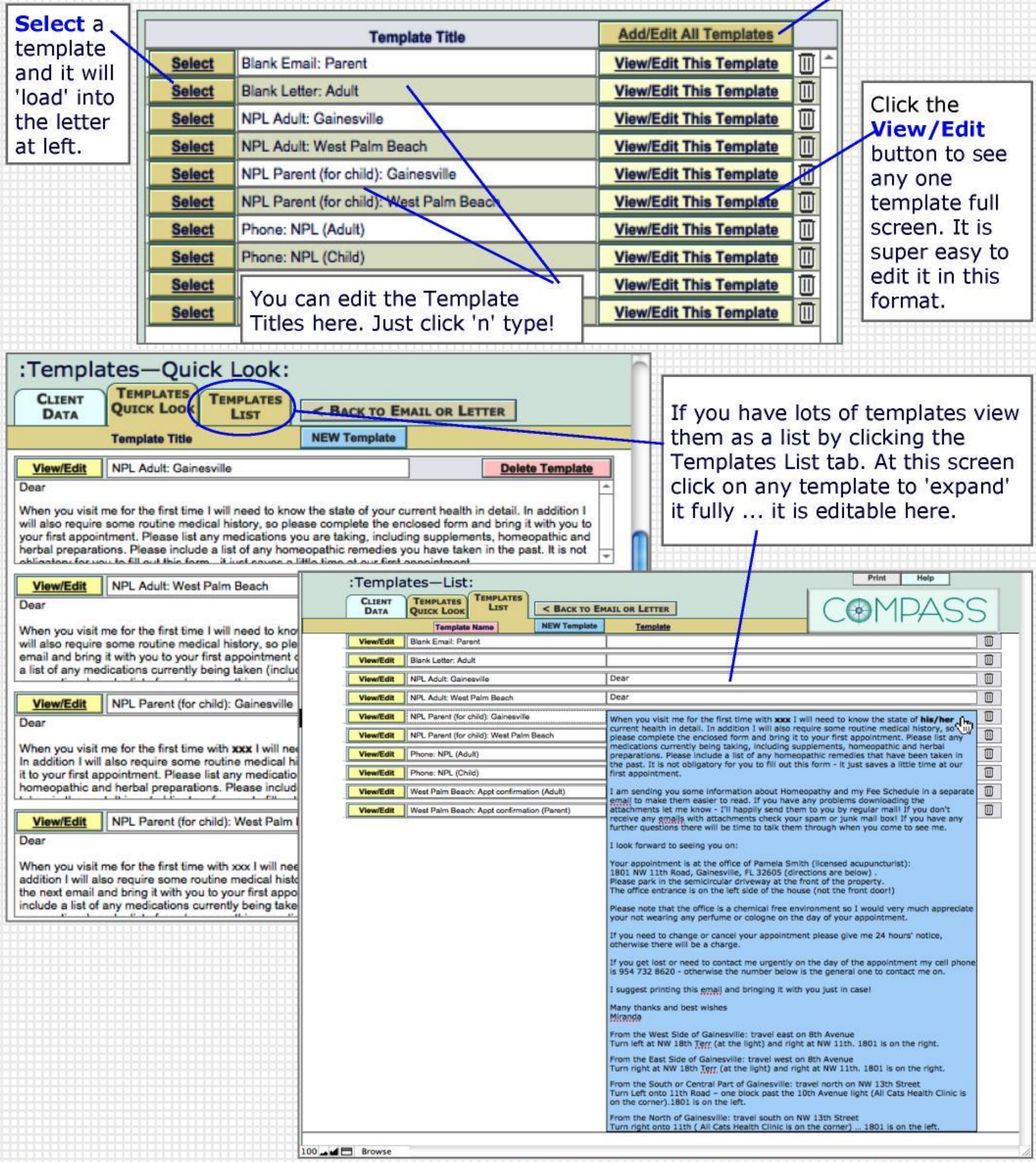
If you have typed something in the letter already or selected a different template you will be asked whether you are sure so you do not inadvertently what you have written.

: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)

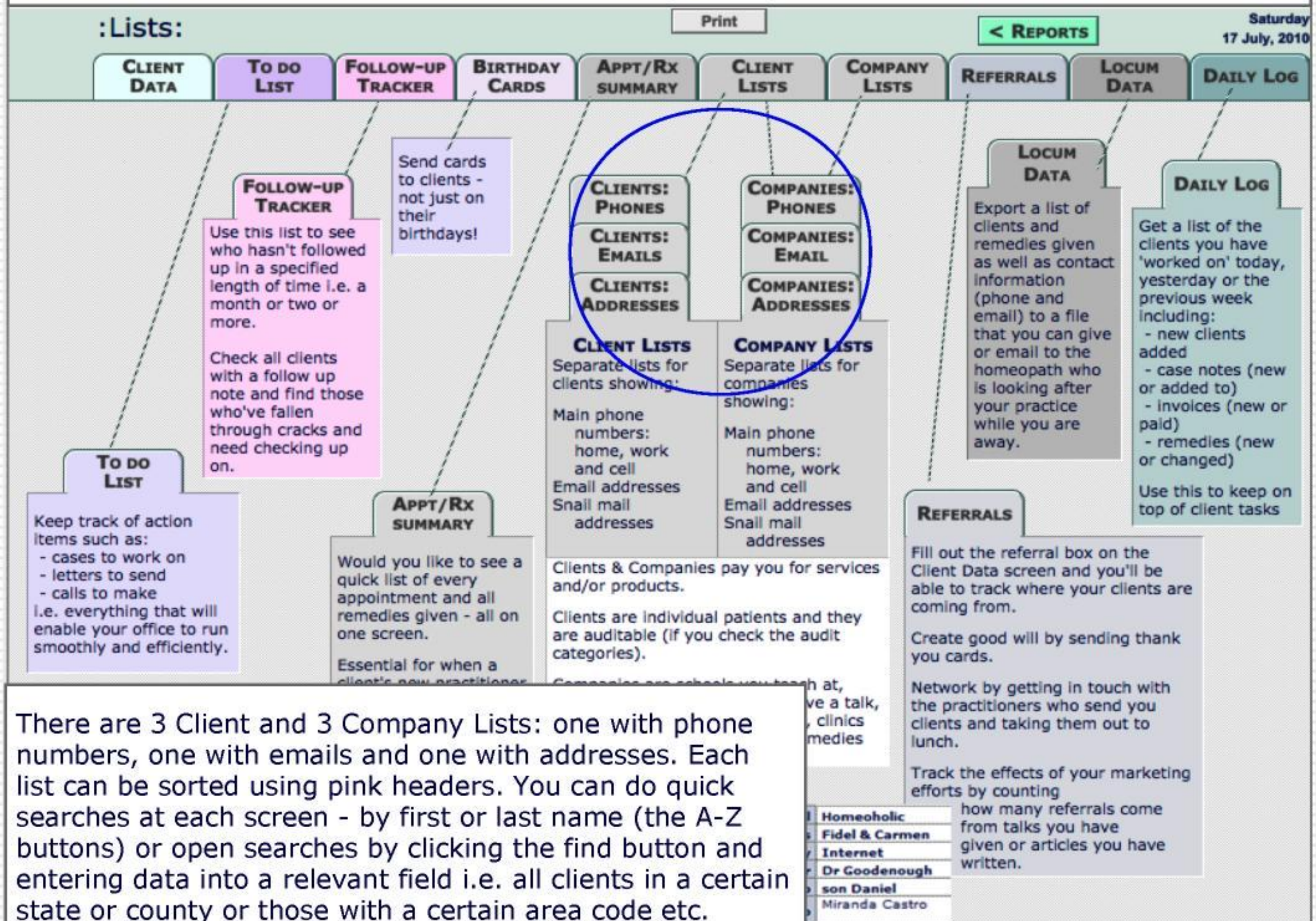
Click **Add/Edit All Templates** to add a template and/or to view all templates at the Quick Look screen and see the first 6 lines of text



:Lists Help:

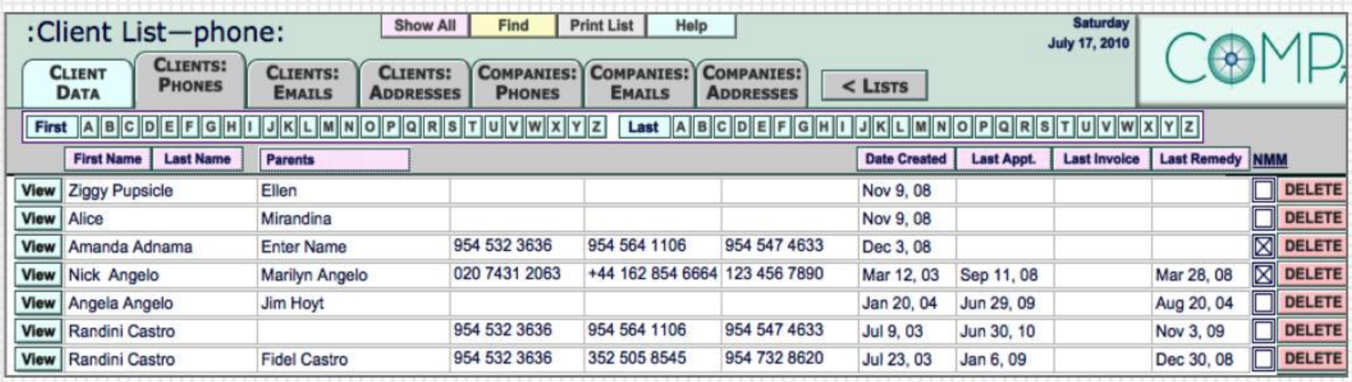
Go to the main Lists screen from Client Data (bottom button). You'll find lots of list tabs there with brief explanations.

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.



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'.



	First Name	Last Name	Parents				Date Created	Last Appt.	Last Invoice	Last Remedy	NMM	
View	Ziggy	Pupsicle	Ellen				Nov 9, 08				☐	DELETE
View	Alice		Mirandina				Nov 9, 08				☐	DELETE
View	Amanda	Adnama	Enter Name	954 532 3636	954 564 1106	954 547 4633	Dec 3, 08				☒	DELETE
View	Nick	Angelo	Marilyn Angelo	020 7431 2063	+44 162 854 6664	123 456 7890	Mar 12, 03	Sep 11, 08		Mar 28, 08	☒	DELETE
View	Angela	Angelo	Jim Hoyt				Jan 20, 04	Jun 29, 09		Aug 20, 04	☐	DELETE
View	Randini	Castro		954 532 3636	954 564 1106	954 547 4633	Jul 9, 03	Jun 30, 10		Nov 3, 09	☐	DELETE
View	Randini	Castro	Fidel Castro	954 532 3636	352 505 8545	954 732 8620	Jul 23, 03	Jan 6, 09		Dec 30, 08	☐	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

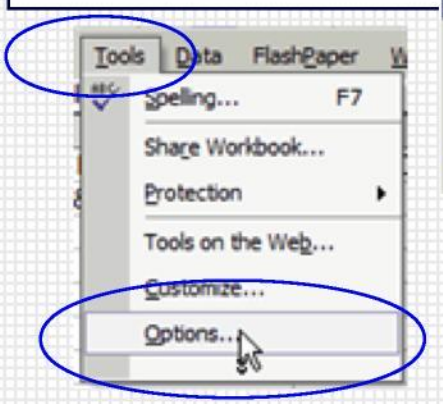
Password protect the excel file in order to preserve your client's confidentiality:

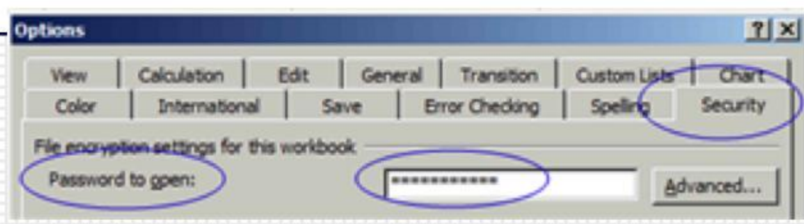
You are legally required to password protect ALL electronically stored information

You have to do this each and every time you export data to a file.

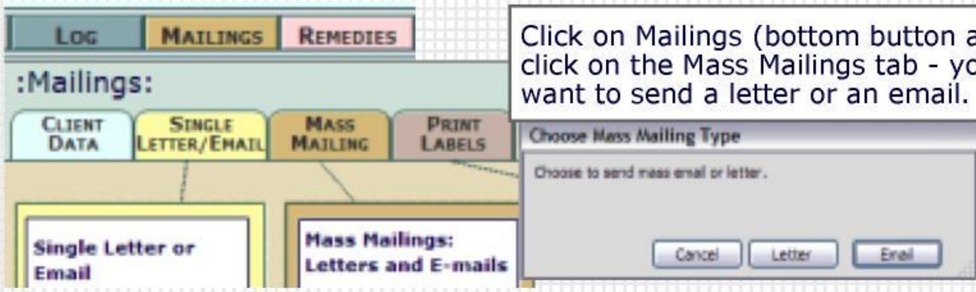
1. Go to the Tools Menu
2. Select Options
3. Click on the Security tab
4. Enter a password and confirm it
5. On exit click Yes to Save changes
6. Open the file to check the password works.

You'll find the file in your COMPASS folder





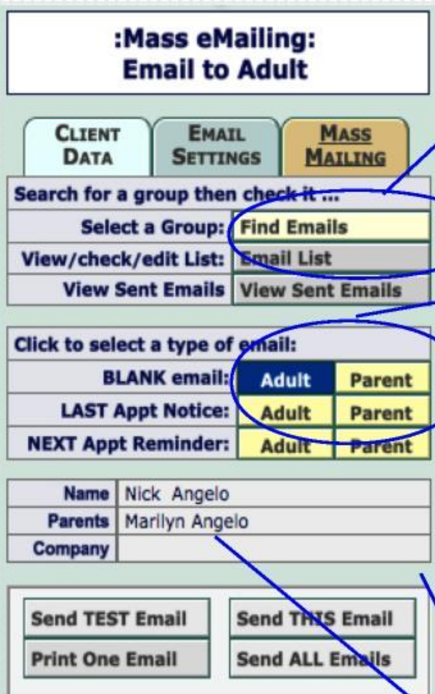
:Mass Mailing Help:



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).



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.

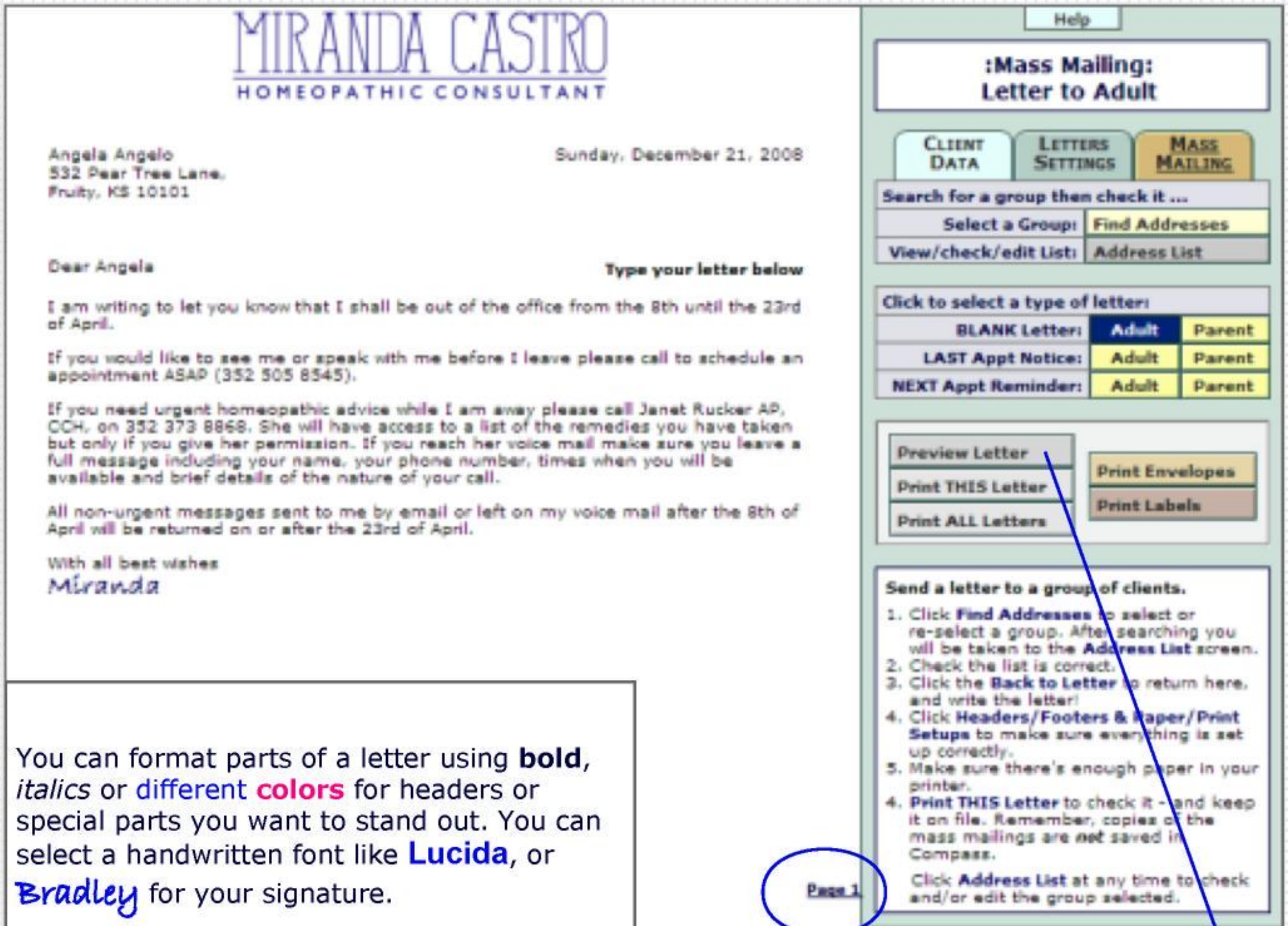
NEXT Appt Reminder: to let people know about an up-coming appointment. You won't get any more 'no-shows' (as long as you have their correct email address of course).

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.

:Mass Mailing Help—Letters:



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.

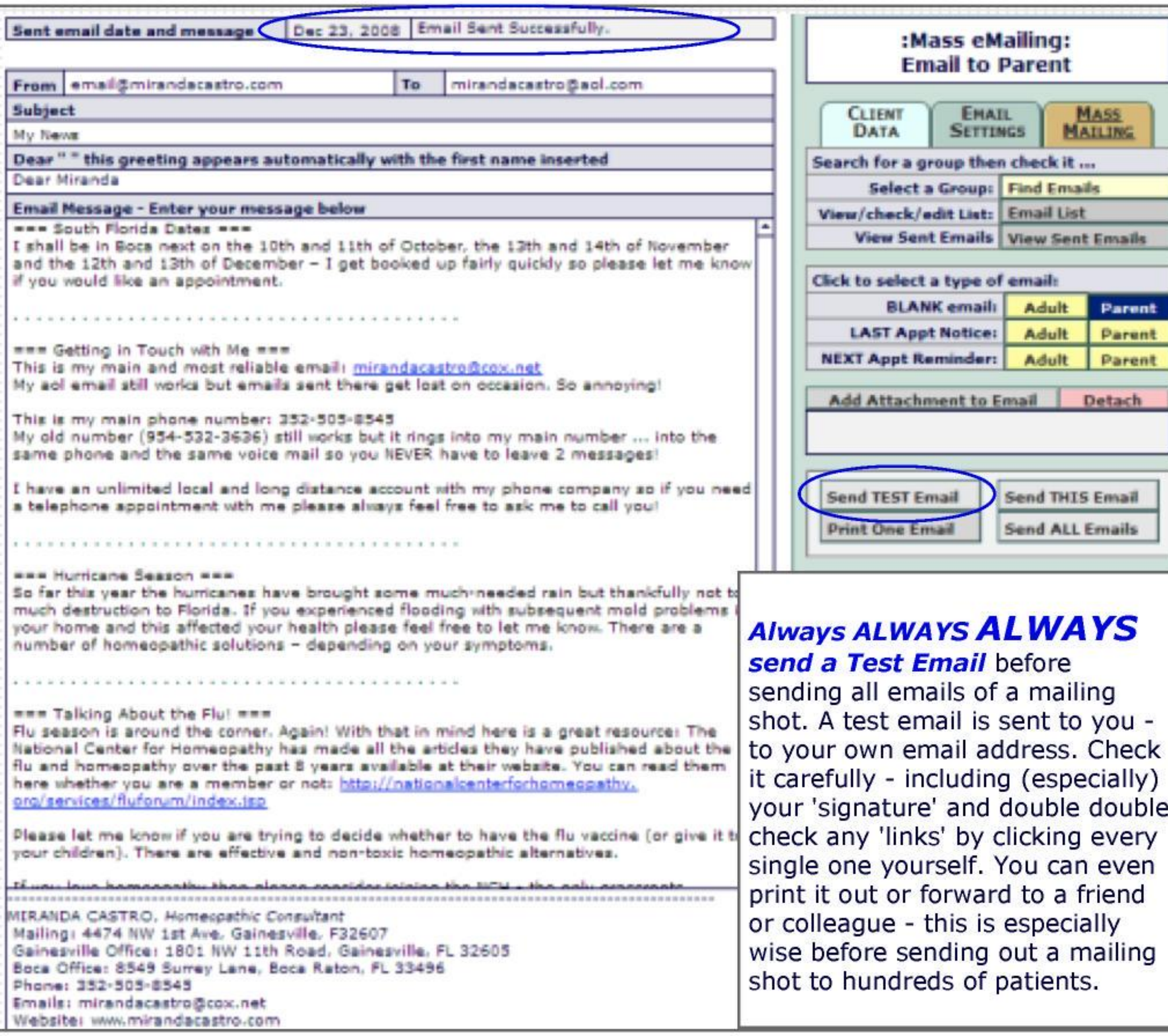
Preview Letter does not give you a precise view - you have to print a test letter to check that your letter fits nicely on one page, or the break is where it should be.

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.

:Mass Mailing Help—Emails:

Check here for verification that an email is sent successful - including the date.



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.

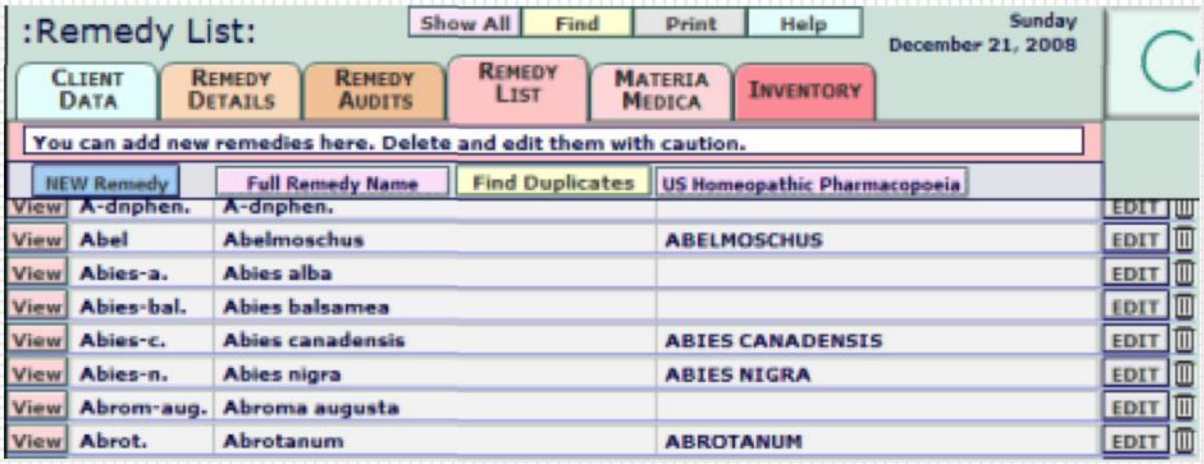
Emails are sent in plain text so there isn't much formatting you can apply. The more formatting there is the higher the chance that it will end up in someone's spam or junk mail folder. Use line spaces and periods or dashes --- - - - or other characters ~~~ to add a bit of 'formatting' so that your emails 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.

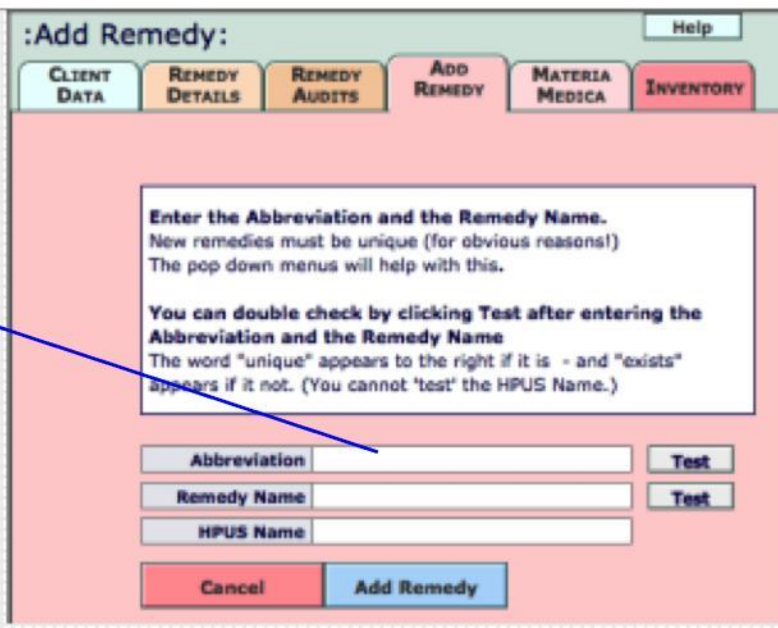
You'll find a Remedy List tab at the Materia Medica and Inventory screens and Remedy List buttons at the Treatment Summary and Remedy Details layouts. They all take you to this layout where you can Find Duplicates, view just the HPUS remedies or add a **New Remedy** to the materia medica. Remedies added also show in the Inventory list.



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.



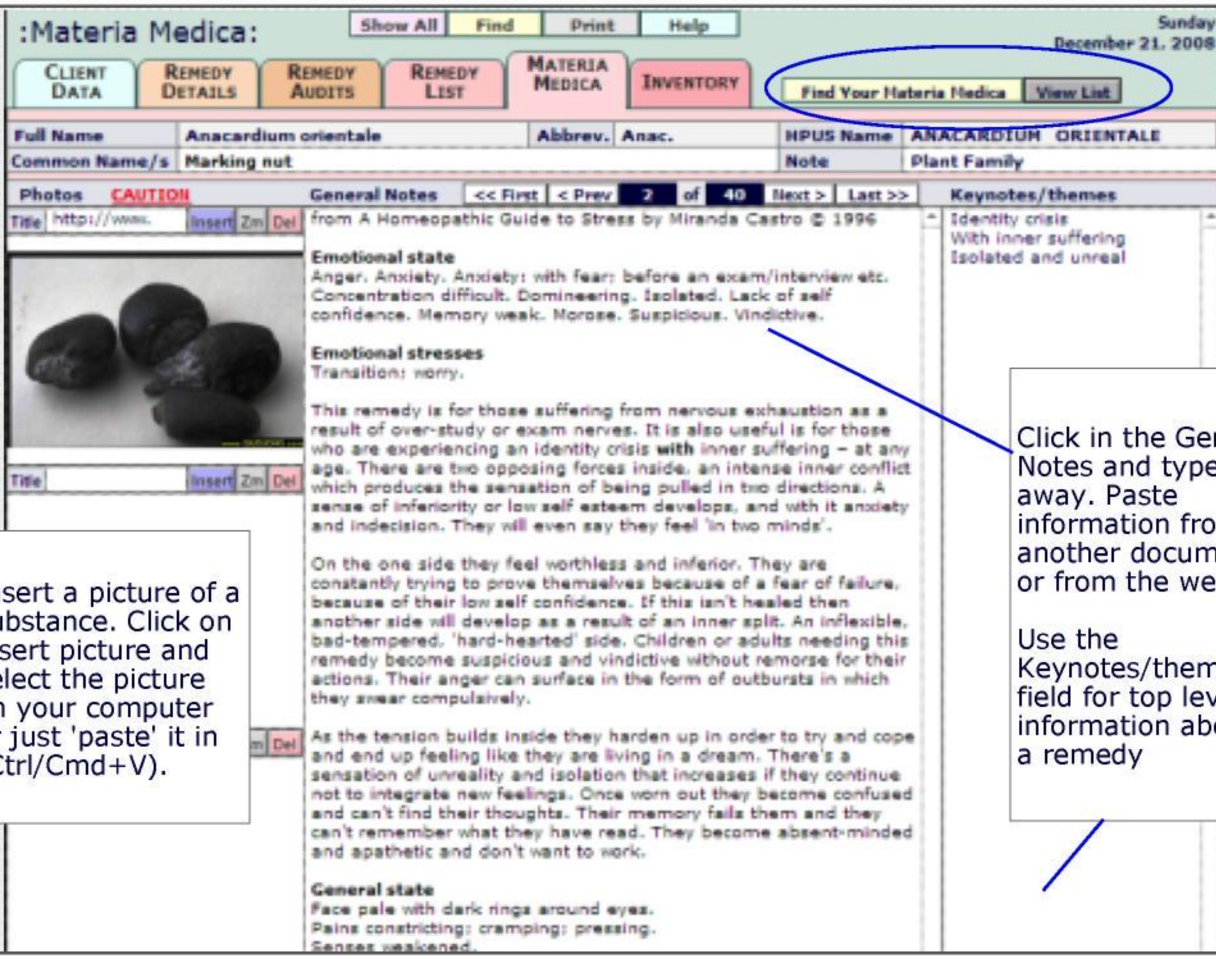
Acknowledgments: Thanks to Washington Homeopathic Products for the remedy list.

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.

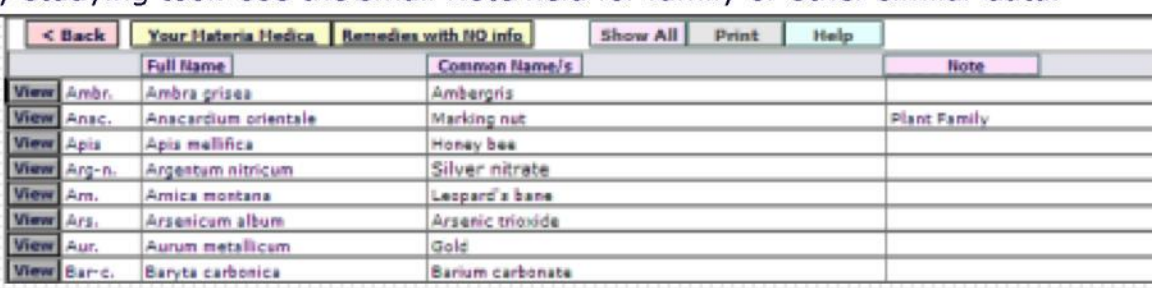


Insert a picture of a substance. Click on insert picture and select the picture on your computer or just 'paste' it in (Ctrl/Cmd+V).

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.



		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	

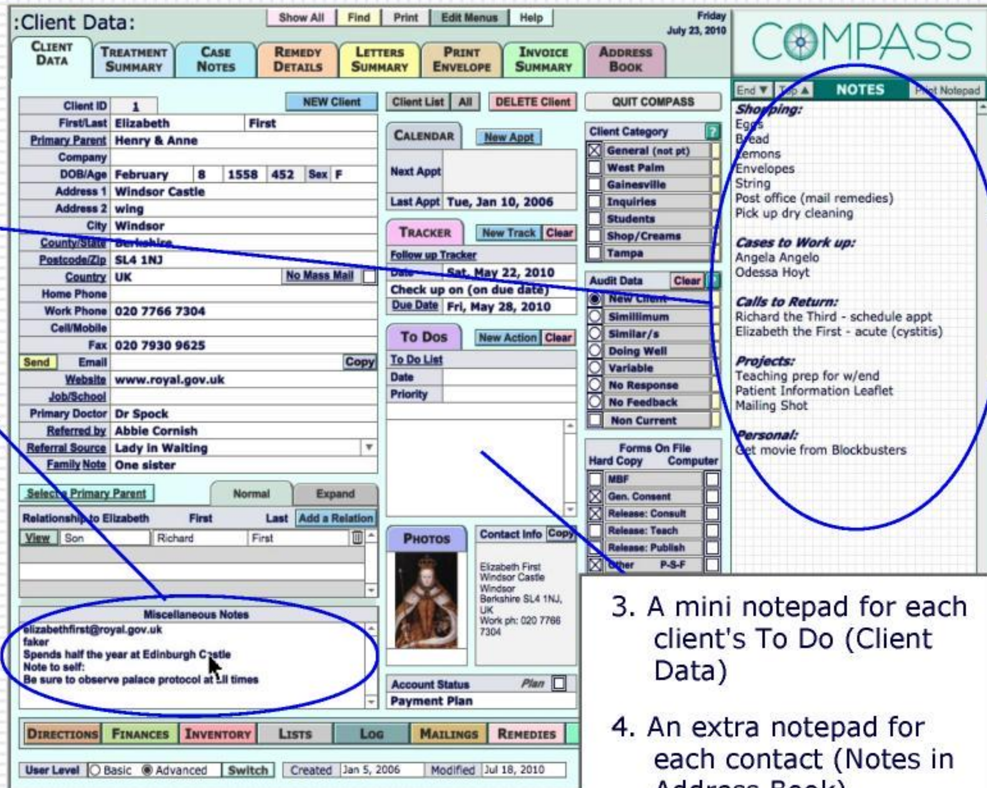
Acknowledgments: Thanks to Miranda Castro (!) for the Materia Medica from A Homeopathic Guide to Stress.

www.homeopathyworks.com

:Notepads Help:

You'll find a few notepads as you navigate about compass

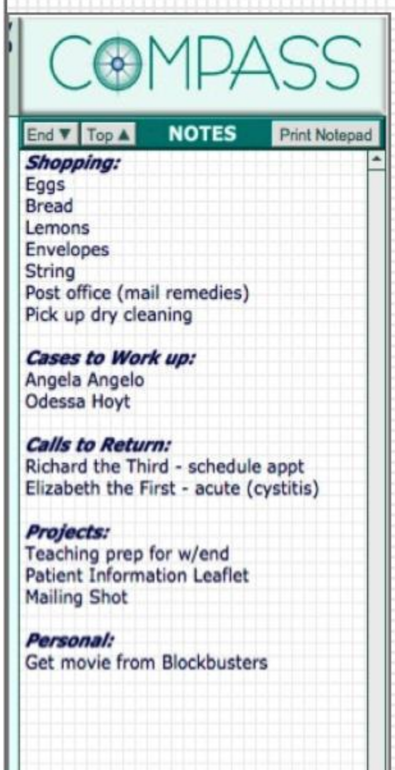
1. The main 'scratch' notepad at the right of your screen.
2. An extra notepad for each client (Miscellaneous Notes in Client Data)

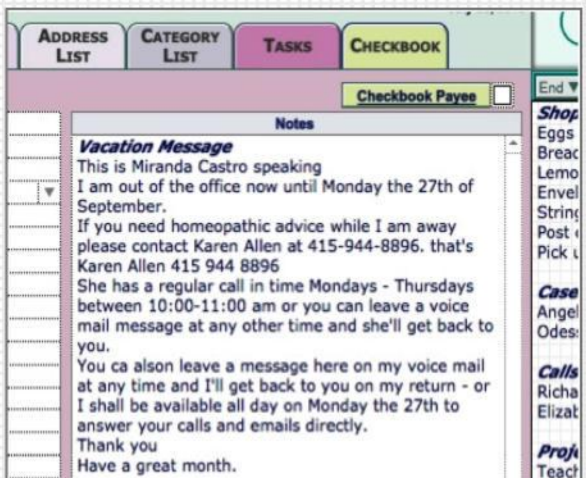


3. A mini notepad for each client's To Do (Client Data)
4. An extra notepad for each contact (Notes in Address Book)

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.





The notepad in the Address Book is linked to each contact - use it for information about that person, contact, company etc. that you want 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 Catgories	
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 ?

- New Client
- Simillimum
- Similar/s
- Doing Well
- Variable
- No Response
- No Feedback
- 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.

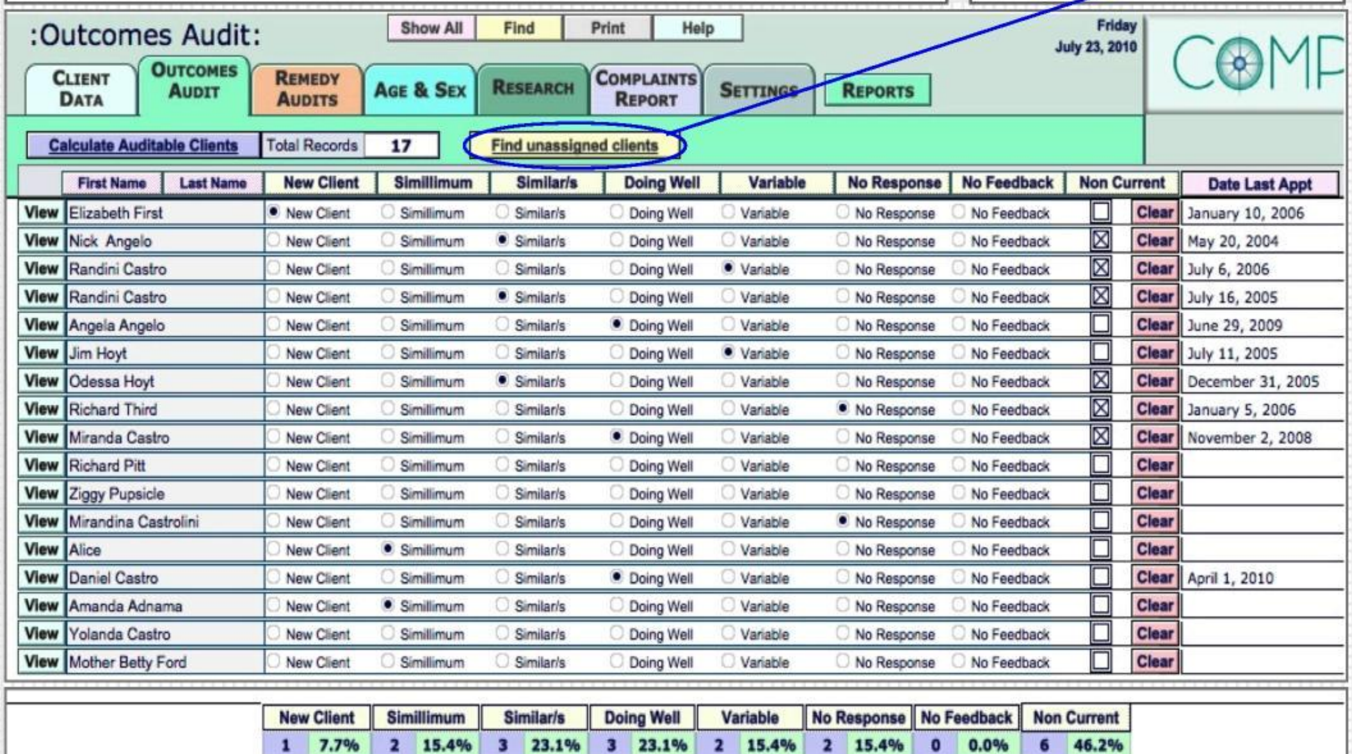
:Outcomes Audit Help—Classifying Clients:

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.



	First Name / Last Name	New Client	Simillimum	Similar/s	Doing Well	Variable	No Response	No Feedback	Non Current		Date Last Appt
View	Elizabeth First	● New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	January 10, 2006
View	Nick Angelo	○ New Client	○ Simillimum	● Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☒	Clear	May 20, 2004
View	Randini Castro	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	● Variable	○ No Response	○ No Feedback	☒	Clear	July 6, 2006
View	Randini Castro	○ New Client	○ Simillimum	● Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☒	Clear	July 16, 2005
View	Angela Angelo	○ New Client	○ Simillimum	○ Similar/s	● Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	June 29, 2009
View	Jim Hoyt	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	● Variable	○ No Response	○ No Feedback	☐	Clear	July 11, 2005
View	Odessa Hoyt	○ New Client	○ Simillimum	● Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☒	Clear	December 31, 2005
View	Richard Third	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	● No Response	○ No Feedback	☒	Clear	January 5, 2006
View	Miranda Castro	○ New Client	○ Simillimum	○ Similar/s	● Doing Well	○ Variable	○ No Response	○ No Feedback	☒	Clear	November 2, 2008
View	Richard Pitt	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	
View	Ziggy Pupsicle	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	
View	Mirandina Castrolini	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	● No Response	○ No Feedback	☐	Clear	
View	Alice	○ New Client	● Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	
View	Daniel Castro	○ New Client	○ Simillimum	○ Similar/s	● Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	April 1, 2010
View	Amanda Adnama	○ New Client	● Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	
View	Yolanda Castro	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	
View	Mother Betty Ford	○ New Client	○ Simillimum	○ Similar/s	○ Doing Well	○ Variable	○ No Response	○ No Feedback	☐	Clear	

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

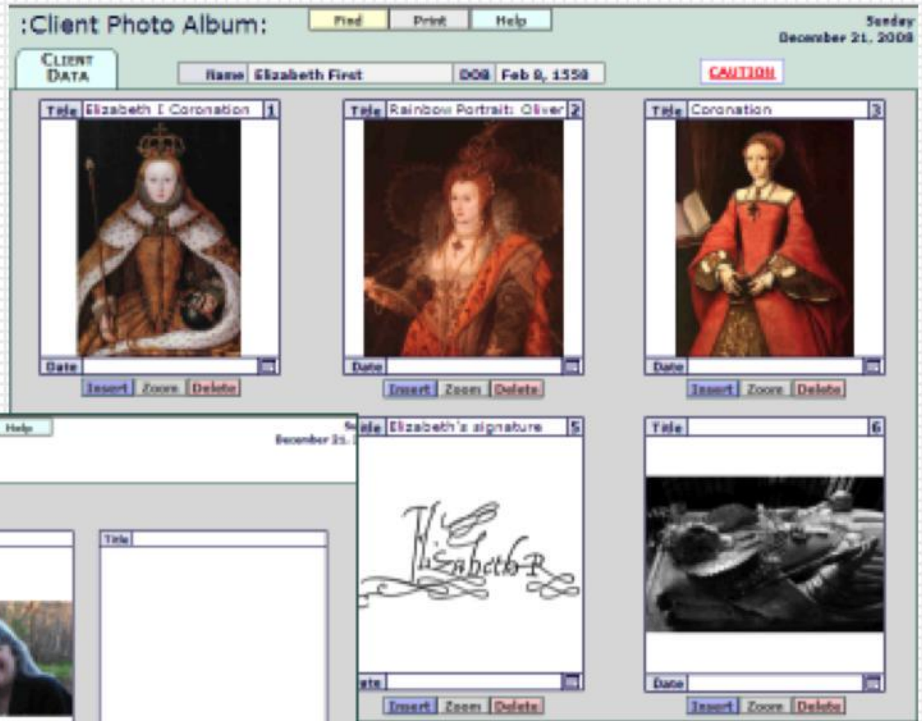
Client came once and hasn't returned
Client hasn't returned in 6 months or more

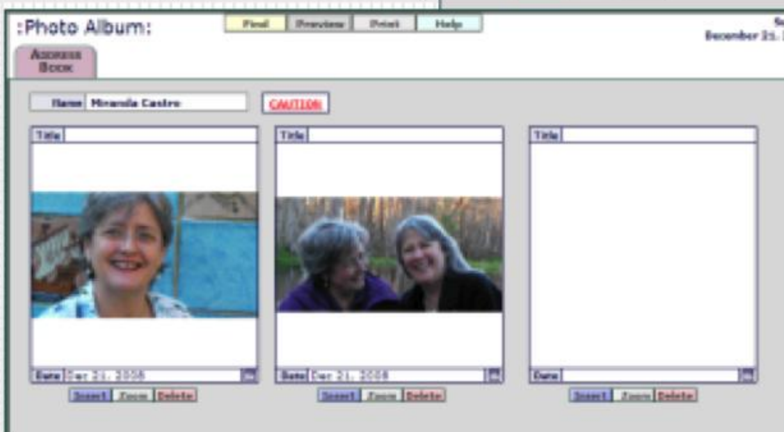
---

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.

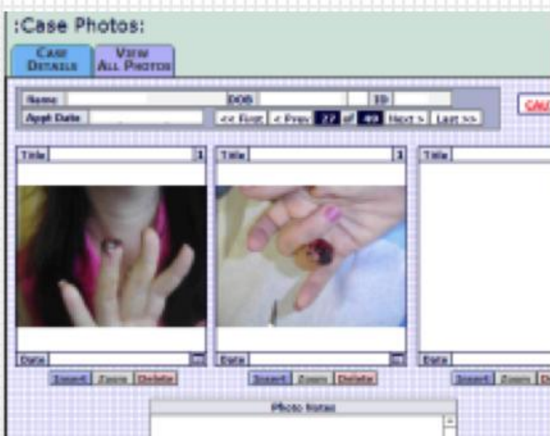
:Photos Help:

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.

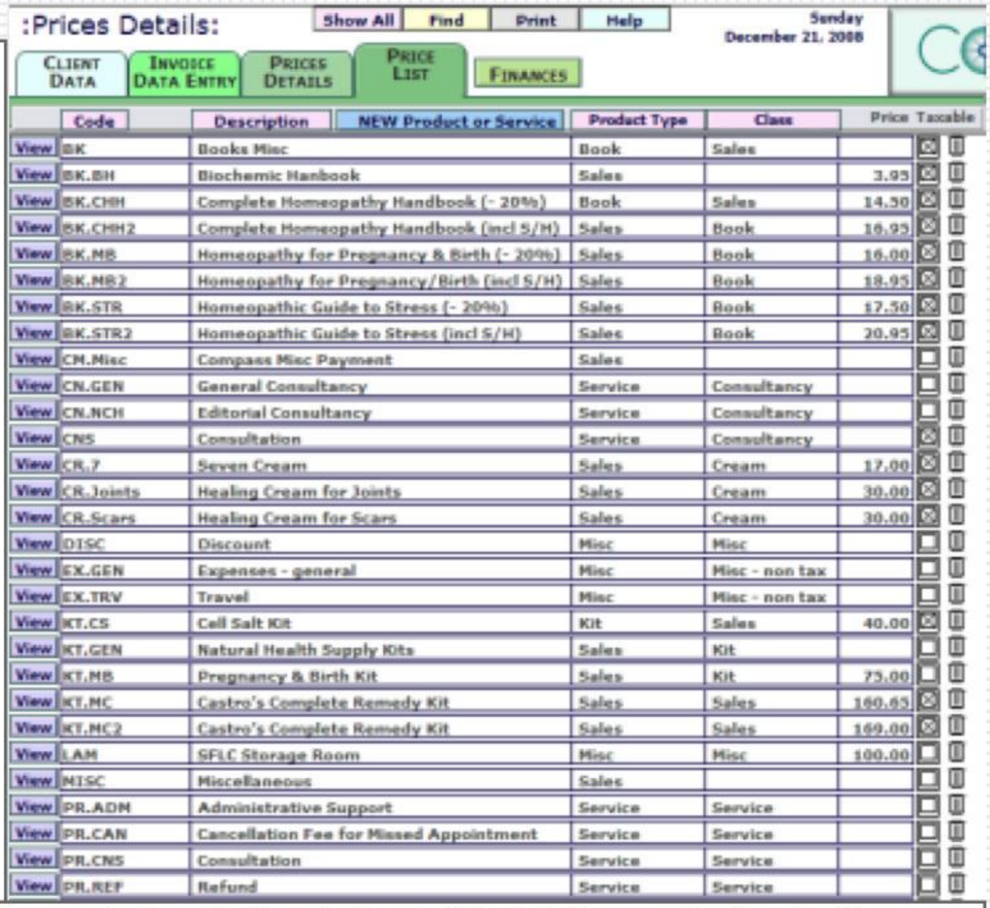
You must have a camera (digital or SLR) and some means of uploading photographs to your computer in order to use this feature. Save the photograph in a .jpg format (the most economical size-wise).

: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.

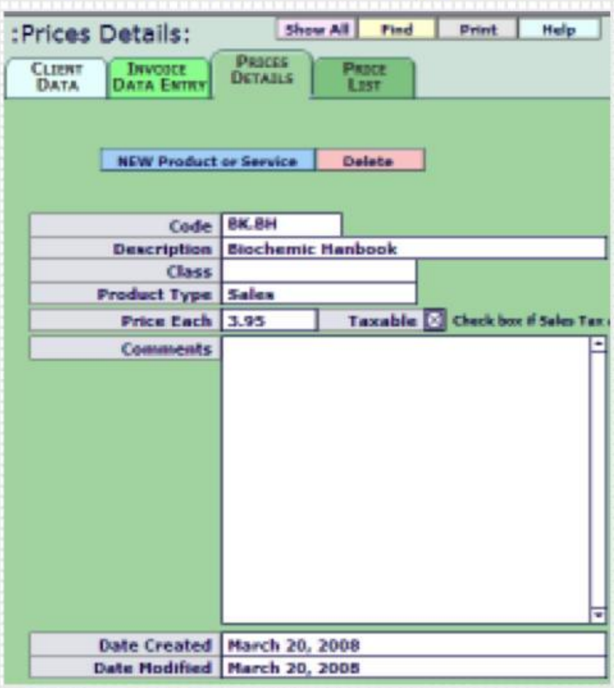
These codes make filling out invoicing a breeze. They also make your reports interesting - you'll be able to track which products are worth bothering with because they are profitable for you - and which are not so much!



	Code	Description	NEW Product or Service	Product Type	Class	Price	Taxable
View	BK	Books Misc		Book	Sales		☒
View	BK.BH	Biochemic Hanbook		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	CM.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	73.00	☐
View	KT.MC	Castro's Complete Remedy Kit		Sales	Sales	160.65	☒
View	KT.MC2	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.



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:

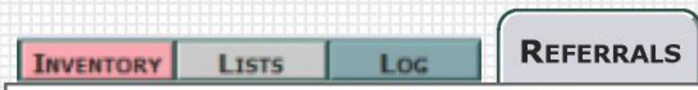
Use this feature to see where are your clients coming from. It's helpful (and good for the health of your business) to know which friend, relative, patient or colleague is making consistent referrals or the most referrals?

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'.

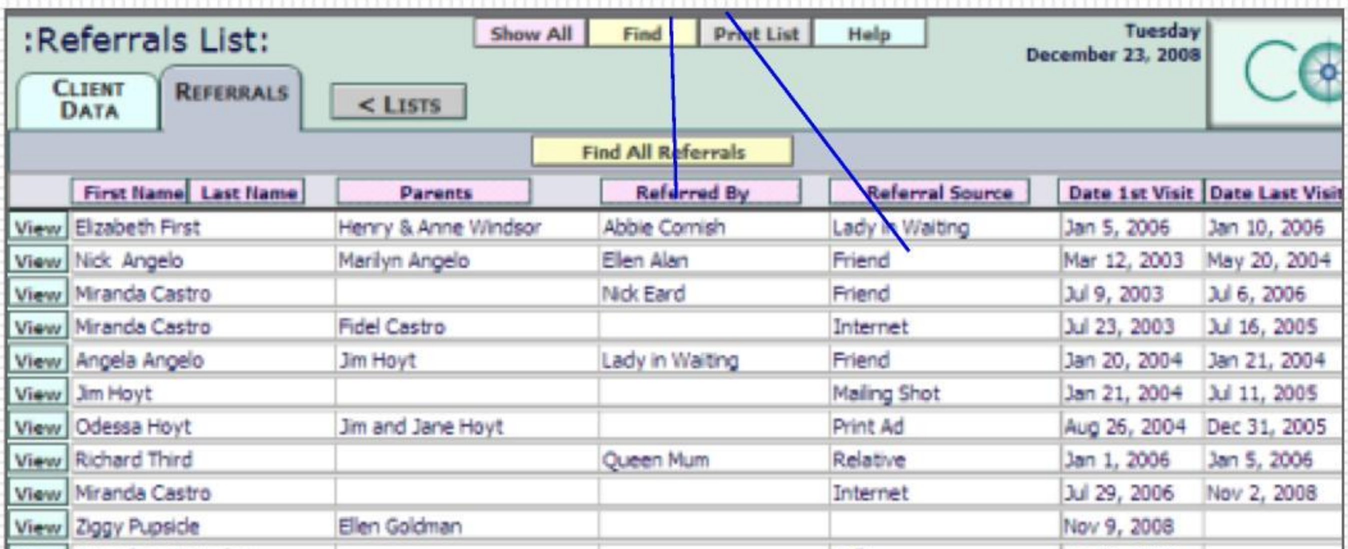
Referred by: Type the name of a person. If they have referred other patients to you their name will automatically appear.

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?



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.



	First Name Last Name	Parents	Referred By	Referral Source	Date 1st Visit	Date Last Visit
View	Elizabeth First	Henry & Anne Windsor	Abbie Cornish	Lady in Waiting	Jan 5, 2006	Jan 10, 2006
View	Nick Angelo	Marilyn Angelo	Ellen Alan	Friend	Mar 12, 2003	May 20, 2004
View	Miranda Castro		Nick Eard	Friend	Jul 9, 2003	Jul 6, 2006
View	Miranda Castro	Fidel Castro		Internet	Jul 23, 2003	Jul 16, 2005
View	Angela Angelo	Jim Hoyt	Lady in Waiting	Friend	Jan 20, 2004	Jan 21, 2004
View	Jim Hoyt			Mailing Shot	Jan 21, 2004	Jul 11, 2005
View	Odessa Hoyt	Jim and Jane Hoyt		Print Ad	Aug 26, 2004	Dec 31, 2005
View	Richard Third		Queen Mum	Relative	Jan 1, 2006	Jan 5, 2006
View	Miranda Castro			Internet	Jul 29, 2006	Nov 2, 2008
View	Ziggy Pupsicle	Ellen Goldman			Nov 9, 2008	

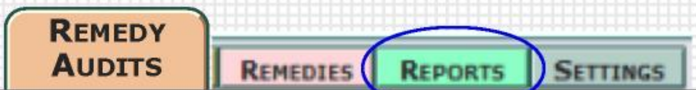
Create good will by sending thank you cards. Make sure you have a signed consent form from your clients giving you permission to name them. If they do not want you to name them then just send a general thank you for their referrals, their confidence in your work.

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

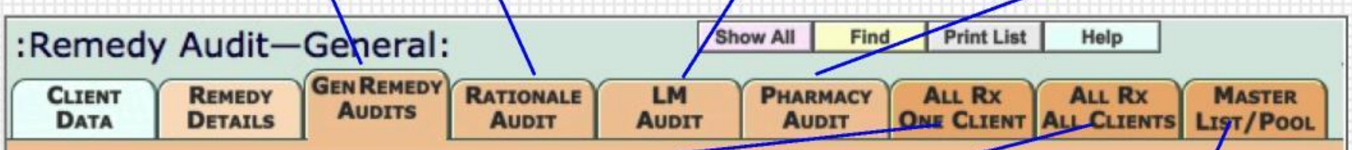
As long as you have selected a 'rationale' for each prescription you can analyze them here - seeing which rationales reliably produce curative results for example.

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.



All Rx One Client

Click this tab to view all the remedies given to a single client.

All Rx All Clients

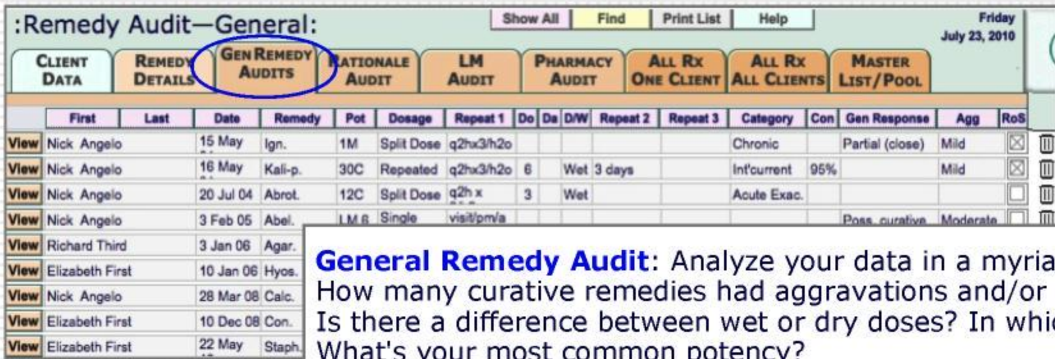
Click this tab to view all the remedies given to all your clients.

Master List/Pool

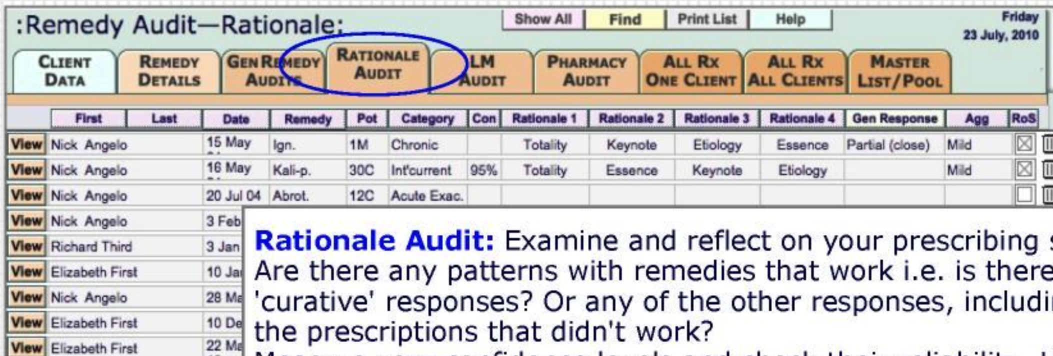
Click this tab to view a complete list of all the remedies you have given (recorded in COMPASS) i.e. your own 'pool' of remedies.

:Remedy Audit Help—Remedy Audits:

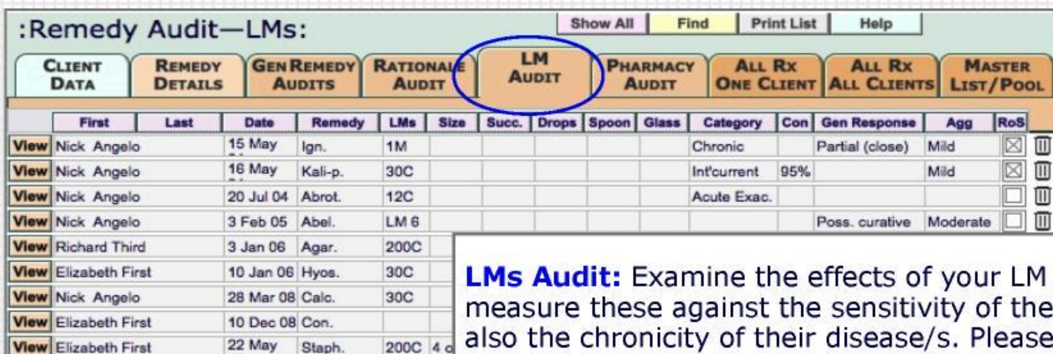
Click on the mountains to zoom in and out (bottom left of screen) 150



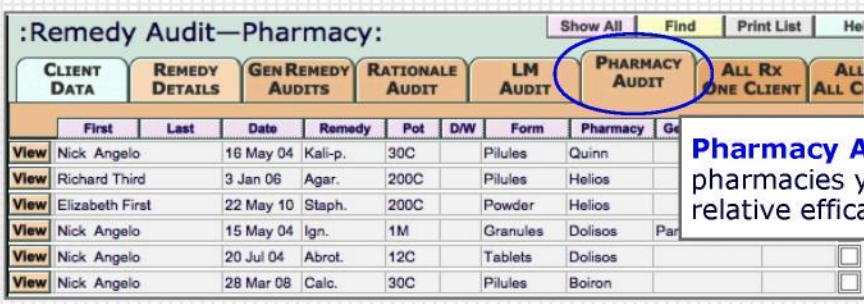
General Remedy Audit: Analyze your data in a myriad ways:
How many curative remedies had aggravations and/or a return of sx.
Is there a difference between wet or dry doses? In which potencies?
What's your most common potency?
Have there been any aggravations with acute remedies? Do you know why?



Rationale Audit: Examine and reflect on your prescribing style/s.
Are there any patterns with remedies that work i.e. is there a pattern with the 'curative' responses? Or any of the other responses, including the 'bad' ones i.e. the prescriptions that didn't work?
Measure your confidence levels and check their reliability. Use a scale - percentages/numbers/letters - one that makes sense to you - one you can track



LMs Audit: Examine the effects of your LM prescriptions: to measure these against the sensitivity of the patient and maybe also the chronicity of their disease/s. Please let us know if you would like us to develop this audit further and how.



Pharmacy Audit: Use this to track the which pharmacies your remedies come from and their relative efficacies.

:Remedy Audits Help—Master Lists:

The **Master Remedy Lists** are for examining your big picture

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.

	Remedy Name	Click to V
Aur-ar.	Aurum arsenicicum	
Aur-ar.	Aurum arsenicicum	
Aur-ar.	Aurum arsenicicum	
Aur-ar.	Aurum arsenicicum	
Aur-ar.	Aurum arsenicicum	
Aur-ar.	Aurum arsenicicum	
Aur-i.	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	
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Aur.	Aurum metallicum	
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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.	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-m-n.	Aurum muriaticum natronatum	
Aur-s.	Aurum sulphuratum	
Aur-s.	Aurum sulphuratum	

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.

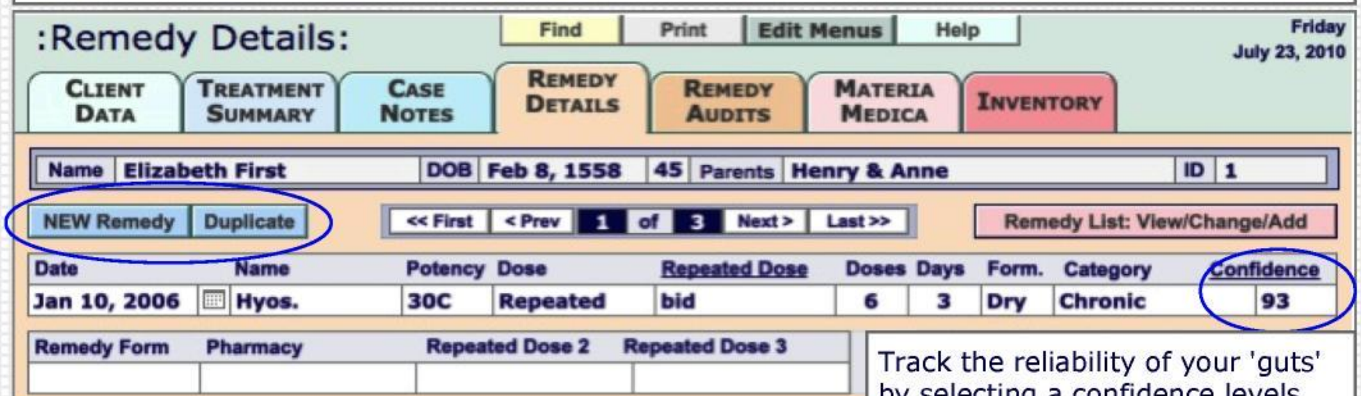
:Remedy Details Help:

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. *



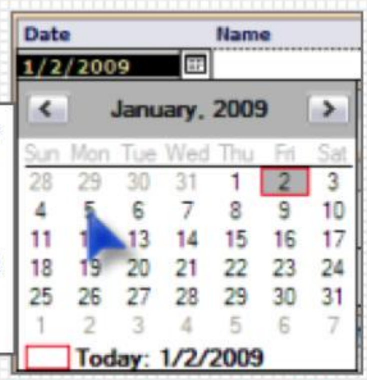
Track the reliability of your 'guts' by selecting a confidence levels with each remedy.: to denote how sure you are. Compare those levels with the results.

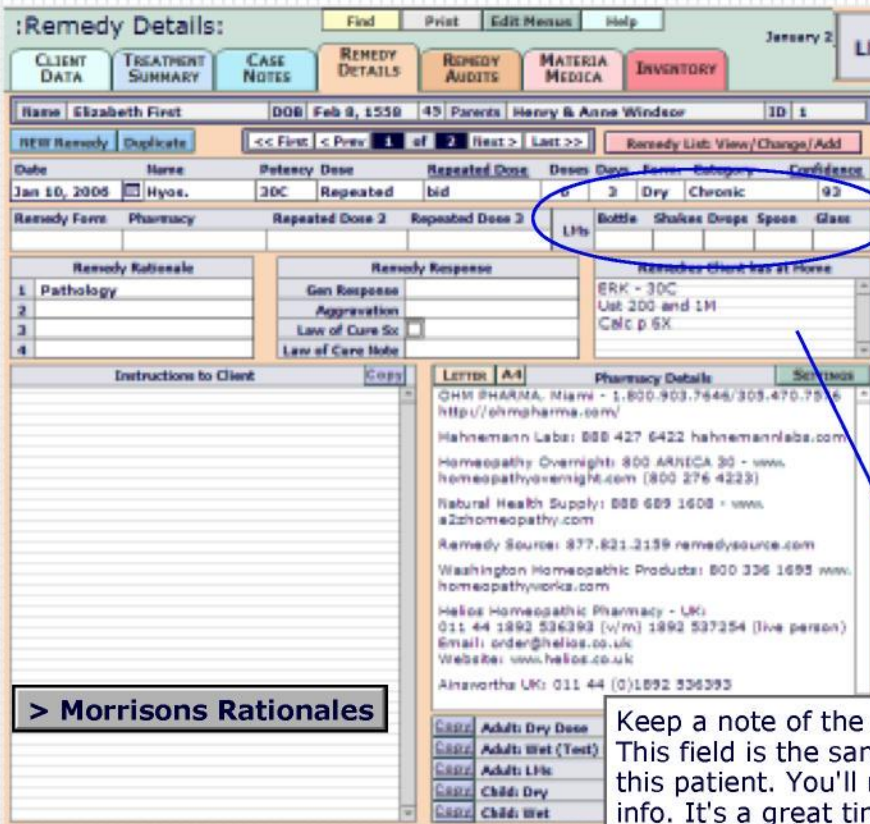
Use the **tab** key to jump to the first field - to the remedy field. Type to the remedy in the pop down menu - type the first 1-4 letters and then use the arrow keys on your keyboard or the scroll bar in the menu to find the remedy you need then click. Press the enter key on your keyboard to jump to 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.

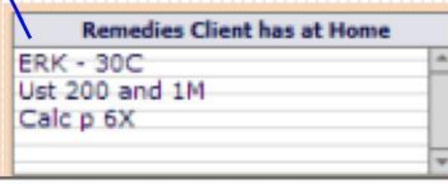
* Click the 'calendar icon' in the date field to view a calendar by month. Click on any other date to select it. Click on the month to scroll to another month, ditto with the year - or use the arrows if you just want to go back or forward one month. You can also click in the field and type another date - the formatting is fairly flexible i.e. it will recognize 1/2/08, or 01/02/2008 or any combo thereof.



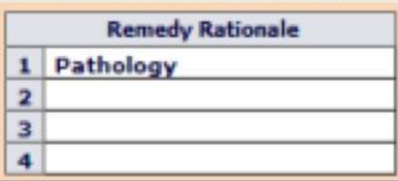


LM Remedy Details
Record exactly how a patient is taking their LM potencies including:

- 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.

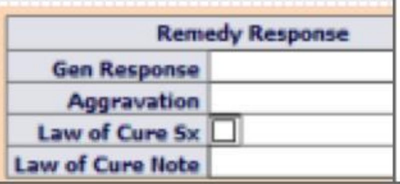


Remedy Rationale
The more rationales you have the more confident you can be in your choice of remedy. If you use these fields you'll be able to see which prescribing rationales work best - and which are not so effective.

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 polycrest) chosen on the basis of a SRP or any genuine Synthetic prescriptions i.e. where there's no proving for the small remedy you have chosen (typically a salt).

Morrison's Rationales



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:

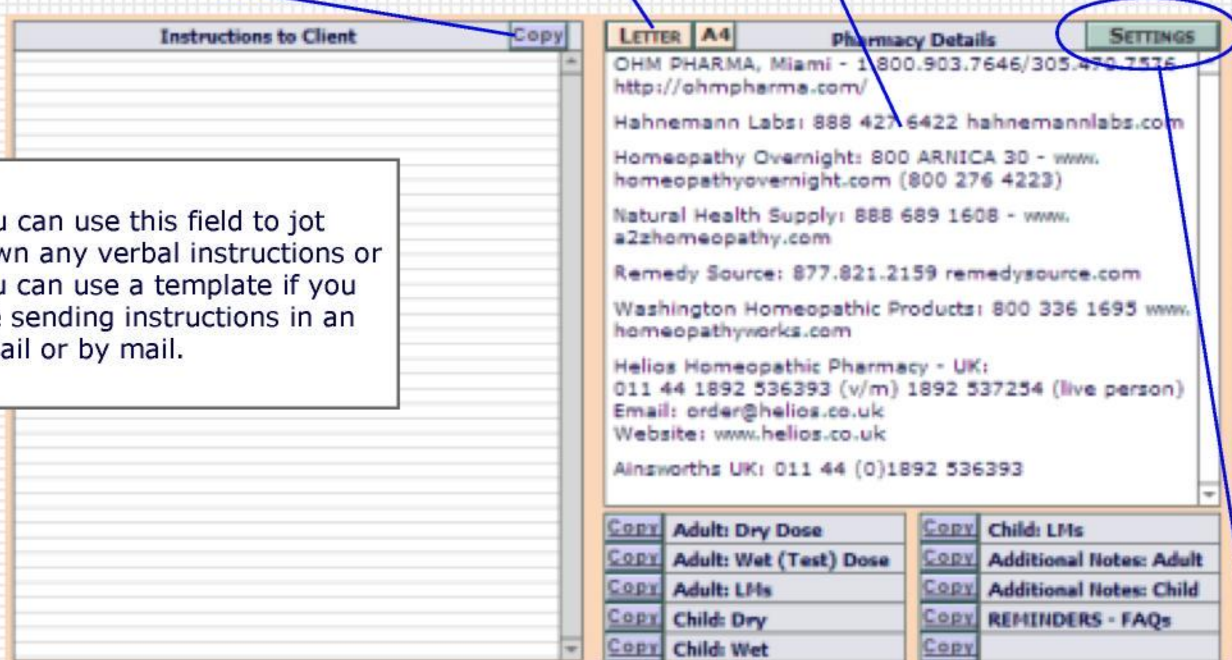
Instructions to Client
It's incredibly helpful to have any instructions you gave to a patient regarding a remedy visible at this screen. Patients can be interestingly creative with how they take their remedies - having a record of how you wanted them to do so is good practice.

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 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

I. **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).

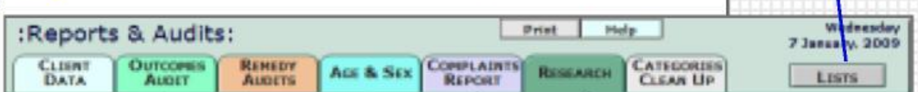
REPORTS. These mostly take facts and/or numbers and crunch them to provide summary information that is based on facts and figures. Complaints falls into this group because the data used is not based on opinion (practitioner's or client's).

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

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 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.

The purpose of this scale is to find out which 3 complaints are bothering patients most. And/or which 3 are bothering them the most at this point in time.
And then to have them evaluate how bad that complaint is.

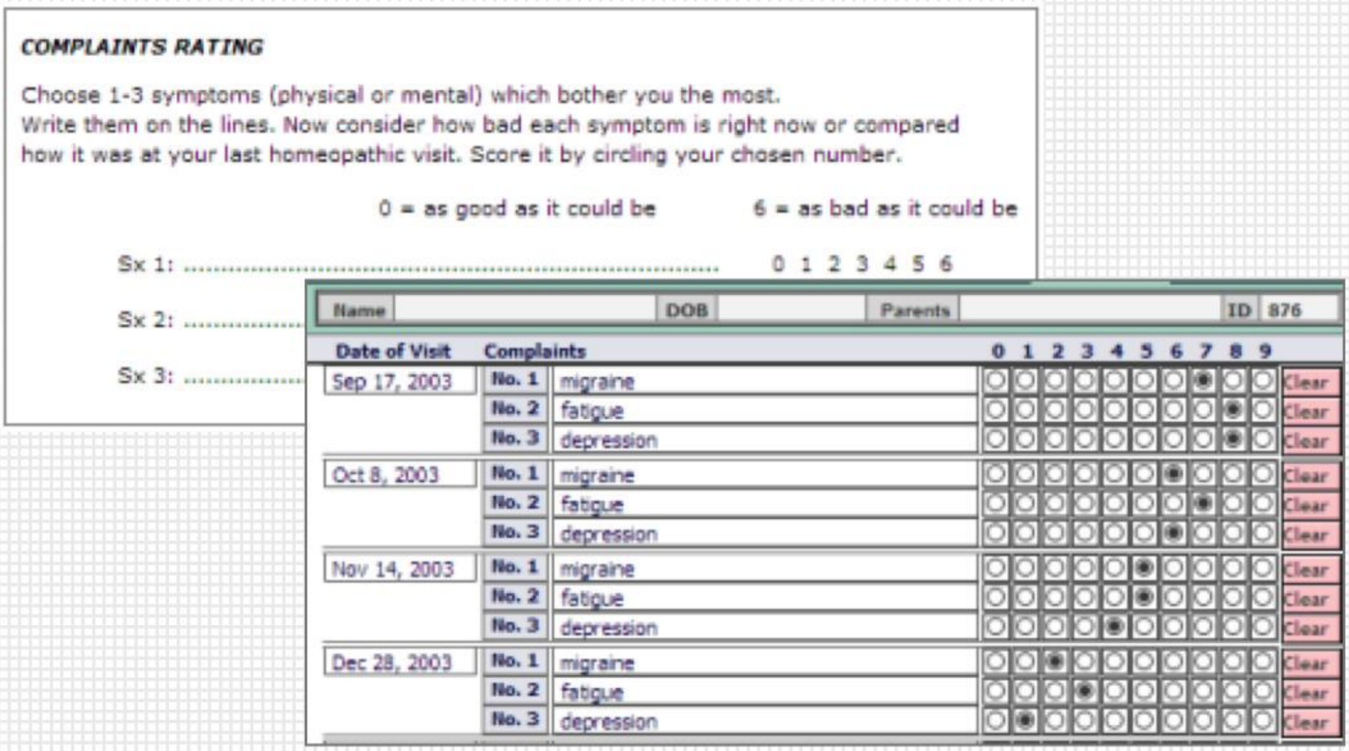
It is interesting to hear a patient say that something is a bit better.
It is often more interesting to ask them to quantify on a scale of 1:10 how bad it is.
And then to look back and see their rating at their last visit. Sometimes the difference between the two ratings is as much as 40%. 40% better is more than 'a bit'. If the number if 10% then they may be trying to please you - they may not be any better at all.

Astonishingly these numbers tend not to lie. They are a spectacular way for homeopaths to gather quantifiable information about the results of their treatments.

You can incorporate this into your case taking - asking people to select a number that describes how bad they are or feel etc., or you can print out the form and have people fill it out after each visit. Again - discrepancies between the two - between how you think they are doing and how they feel they are doing is important.

If someone is better, you may want to ask them what else may have contributed to their feeling better (and give some examples i.e. a holiday, acupuncture treatment, a special diet, falling in love etc.)

Remember, not everything that happens in a person's life after they take a homeopathic remedy, is due to the remedy!



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 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: ....

Sx 3: ....

Name | DOB | Parents | ID 876

Date of Visit	Complaints		0	1	2	3	4	5	6	7	8	9	
Sep 17, 2003	No. 1	migraine	○	○	○	○	○	○	○	●	○	○	Clear
	No. 2	fatigue	○	○	○	○	○	○	○	○	●	○	Clear
	No. 3	depression	○	○	○	○	○	○	○	○	●	○	Clear
Oct 8, 2003	No. 1	migraine	○	○	○	○	○	○	●	○	○	○	Clear
	No. 2	fatigue	○	○	○	○	○	○	○	●	○	○	Clear
	No. 3	depression	○	○	○	○	○	○	●	○	○	○	Clear
Nov 14, 2003	No. 1	migraine	○	○	○	○	○	●	○	○	○	○	Clear
	No. 2	fatigue	○	○	○	○	○	●	○	○	○	○	Clear
	No. 3	depression	○	○	○	○	●	○	○	○	○	○	Clear
Dec 28, 2003	No. 1	migraine	○	○	●	○	○	○	○	○	○	○	Clear
	No. 2	fatigue	○	○	○	●	○	○	○	○	○	○	Clear
	No. 3	depression	○	●	○	○	○	○	○	○	○	○	Clear

The European Committee for Homeopathy are working to create standards and write policy documents to help homeopathic clinicians gather usable data from their practices.

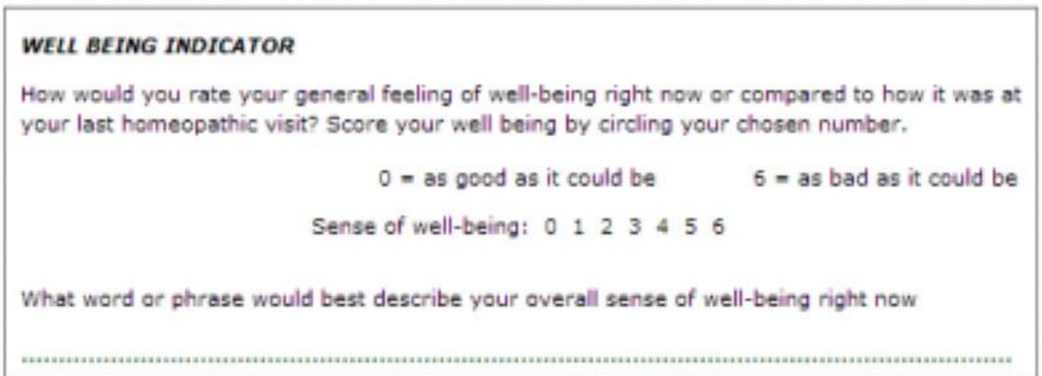
Click to view their document explaining more about the use of these (and other) research tools in homeopathic practice > **Data Collection in Practice**

: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.



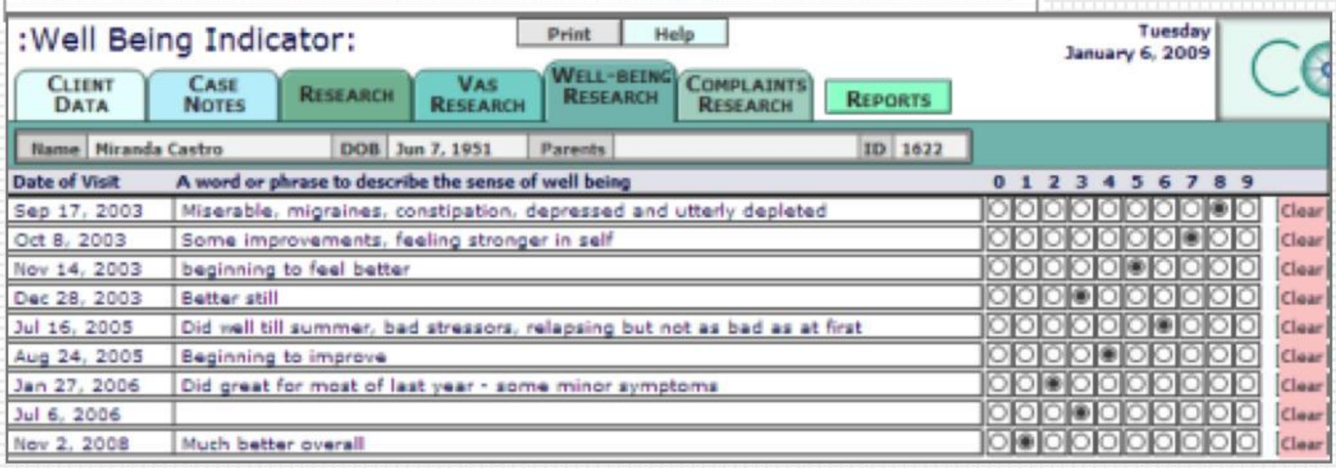
WELL BEING INDICATOR

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   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



: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									●		Clear
Oct 8, 2003	Some improvements, feeling stronger in self								●			Clear
Nov 14, 2003	beginning to feel better						●					Clear
Dec 28, 2003	Better still				●							Clear
Jul 16, 2005	Did well till summer, bad stressors, relapsing but not as bad as at first							●				Clear
Aug 24, 2005	Beginning to improve					●						Clear
Jan 27, 2006	Did great for most of last year - some minor symptoms			●								Clear
Jul 6, 2006					●							Clear
Nov 2, 2008	Much better overall		●									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.

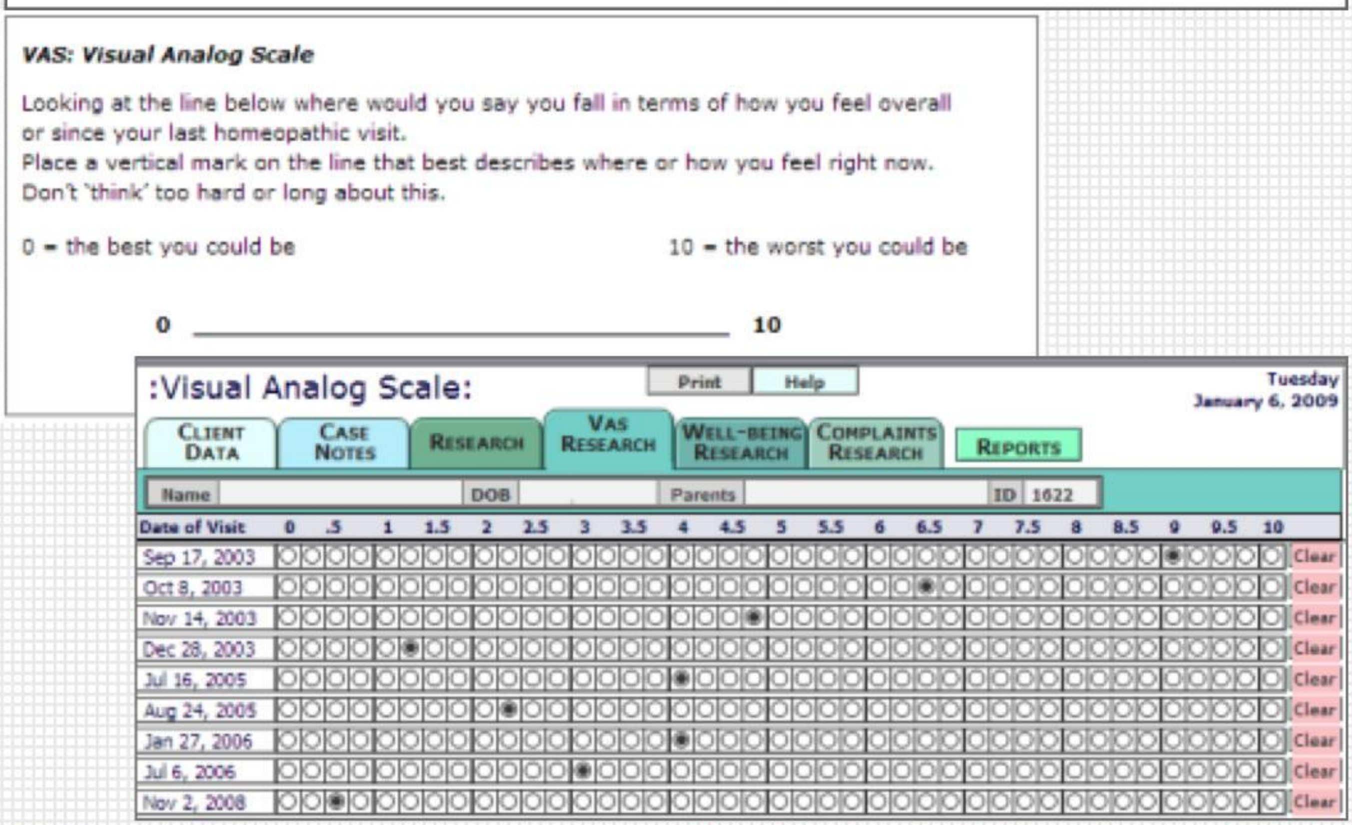
This 10 cm line is a remarkably accurate measure of where a person instinctively feels they are 'at'. It's gloriously simple - it's easy to administer and quick for patients to use, as well as quick and easy to input the data. Please the line against a rule and make a note of the number/s then click 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

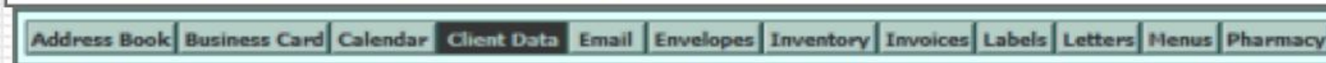
Looking at the line below where would you say you fall in terms of how you feel overall or since your last homeopathic visit.
Place a vertical mark on the line that best describes where or how you feel right now.
Don't 'think' too hard or long about this.

0 = the best you could be — 10 = the worst you could be

0 ________________________________ **10**

:Settings Help—Client Data:

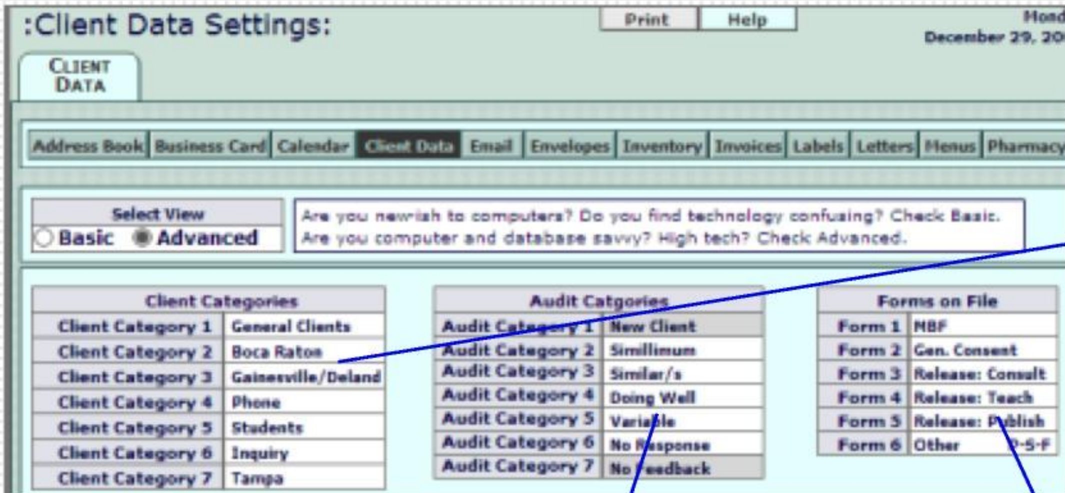
There are instructions at each Settings screen to help you understand what you need to do and how to do it. Most of these are straightforward. There's some extra help in this help manual and also some at the individual help pages i.e. Calendar and Emails etc.



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!



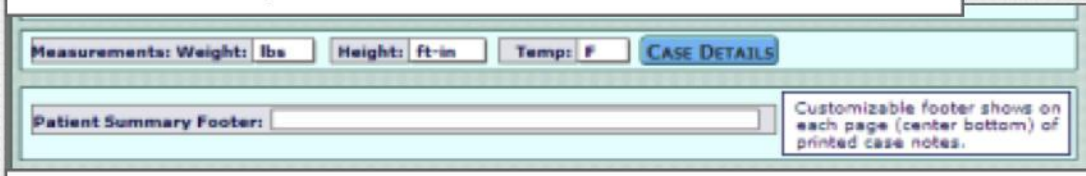
Client Data is where you enter your own client categories

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 change Audit Categories 2 through 6 if you wish. Click in any of the white fields and type away.

You can also customize the kinds of patient forms you keep on file.

You can change the weight, height and temperature headers depending on which 'system' you use (pounds/kilos, feet/meters, Fahrenheit/Celsius).



The Patient Summary footer is for if you have to print anything special (legal) on each page of your clients' case notes.

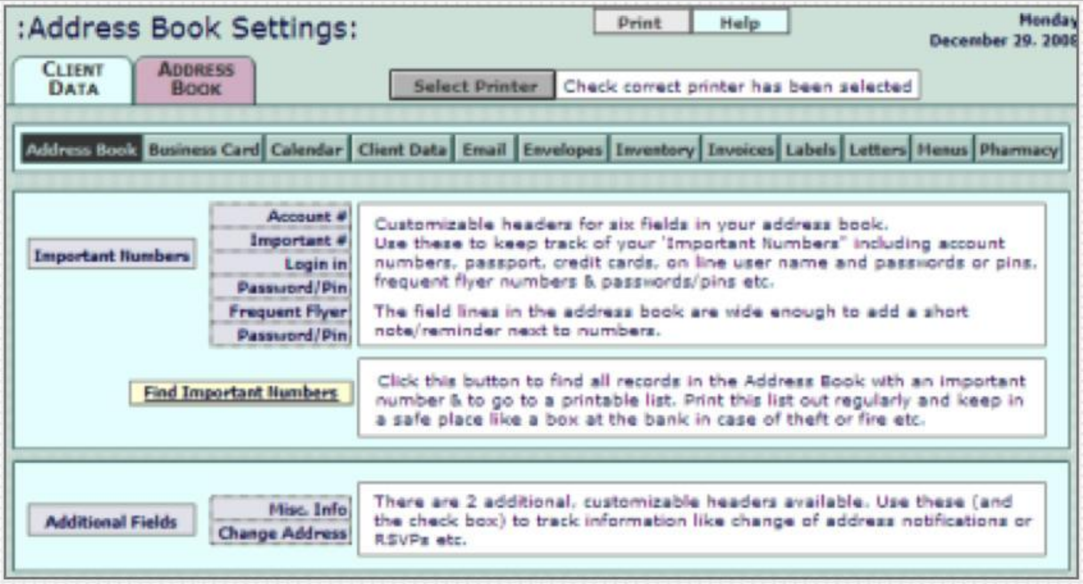
Changes
You can change any customizable fields at any time. It's not a good idea to keep doing so especially with Client Categories. COMPASS will NOT remember former categories. If you wish to do this then search for all clients in a soon to be defunct category and add a relevant note in the Miscellaneous 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:

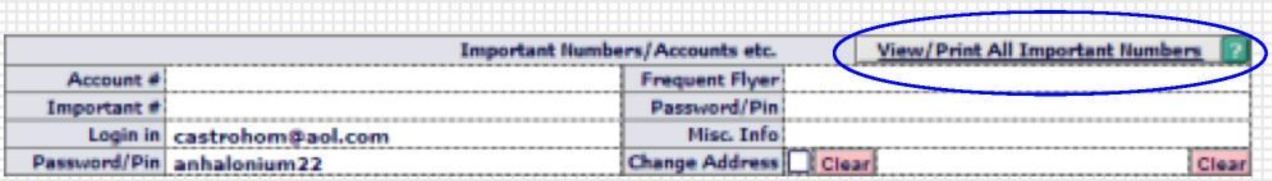
There are 8 fields in the Address Book that are fully customizable.

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.n

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.

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.

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.

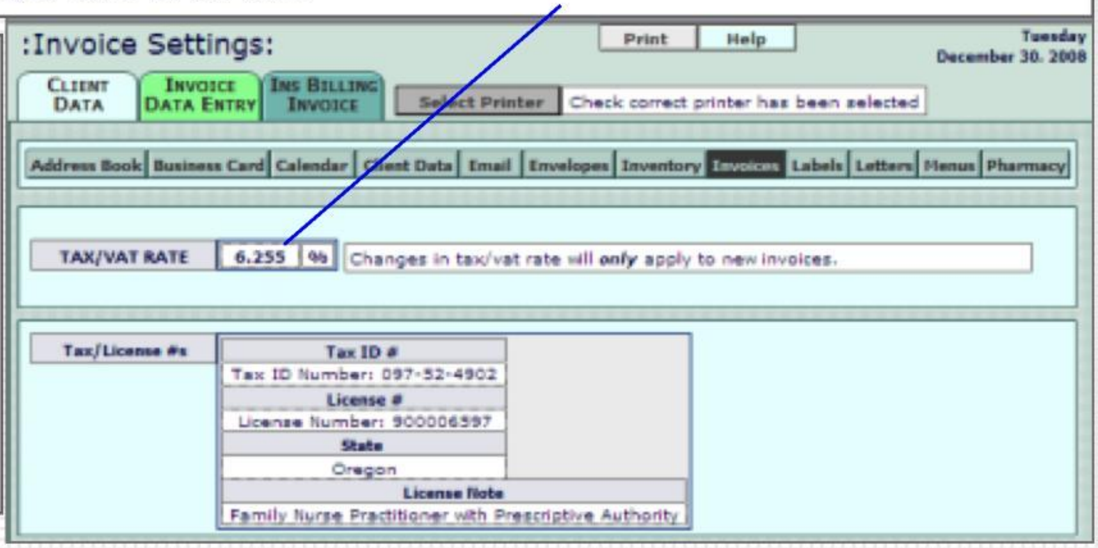
If you have your own letterheads you'll want to make sure all four fields (the 2 headers and the 2 footers) are completely empty.

:Settings Help—Miscellaneous:

Business Card settings: Go to the **Business Card** page in this Manual for instructions.

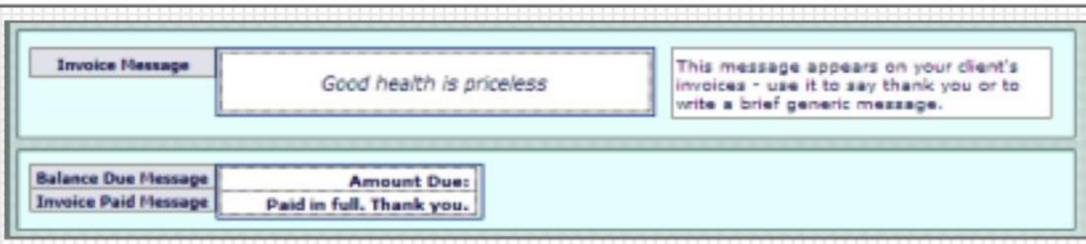
Getting set up with Invoices Settings: Go to the Invoices Settings screen and select your tax (or VAT) rate. You can only select one tax rate in COMPASS. Any taxable services or goods are then automatically charged taxes at this rate.

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).



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.

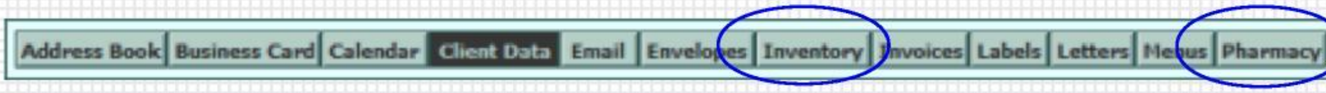
These messages will appear on all your invoices. You can remove them if you would prefer there to be nothing - or replace them with something of your own. You can write longer 'quotes' but you will then need to change the font size and print out an invoice to check it looks good.



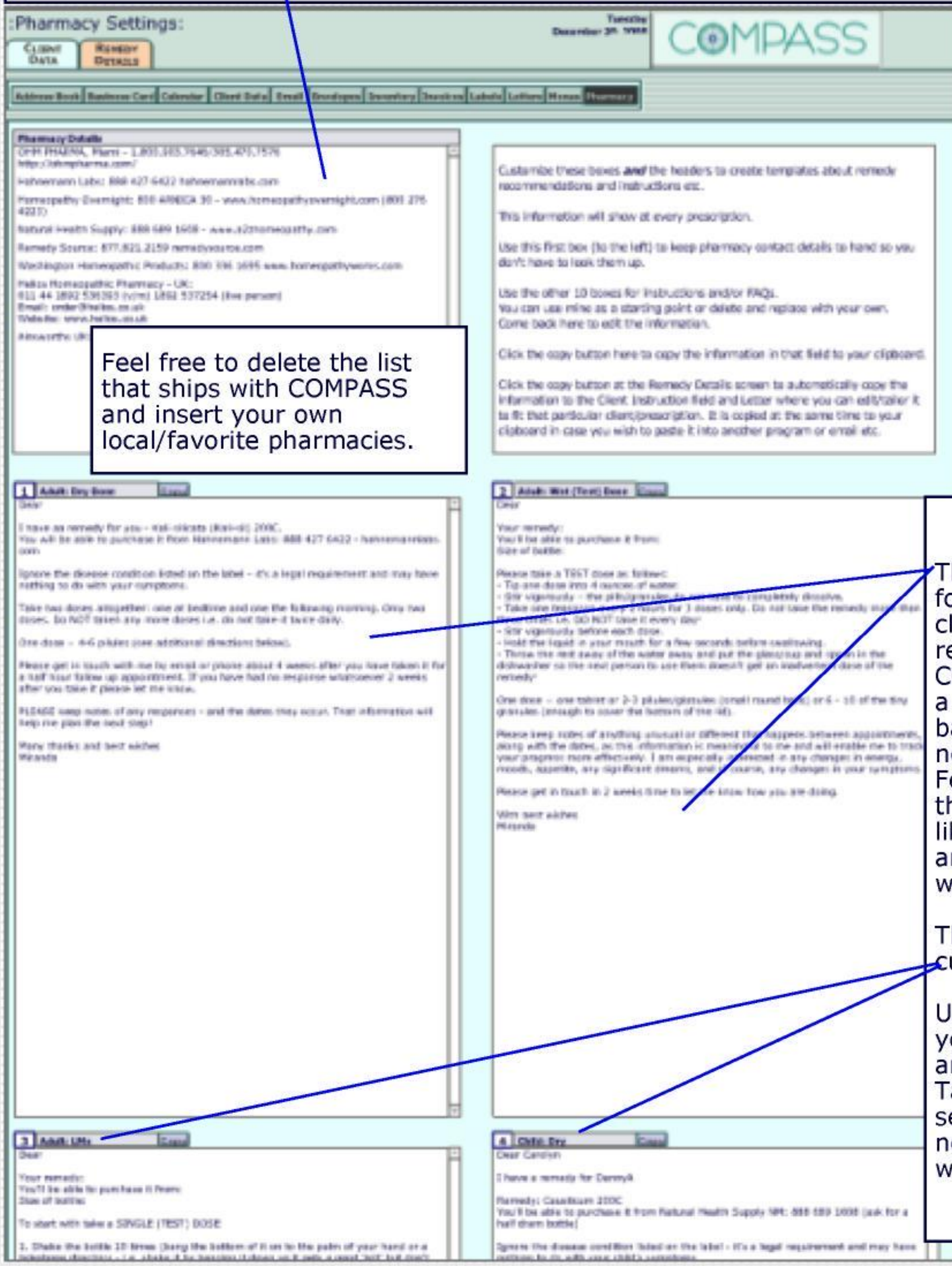
The Balance Due and Invoice Paid Messages are also customizable - make sure they are short i.e. that they fit within the field.

:Settings Help—Remedies/Pharmacy:

Inventory settings: Go to the **Inventory** page in this Manual for instructions.



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.



Feel free to delete the list that ships with COMPASS and insert your own local/favorite pharmacies.

There are ten fields for instructions to 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.

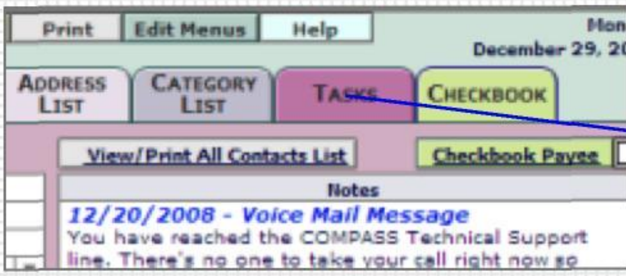
Using these will save you an astonishing amount of time. Taking the time to set them up with never, ever be wasted!

:Tasks Help:

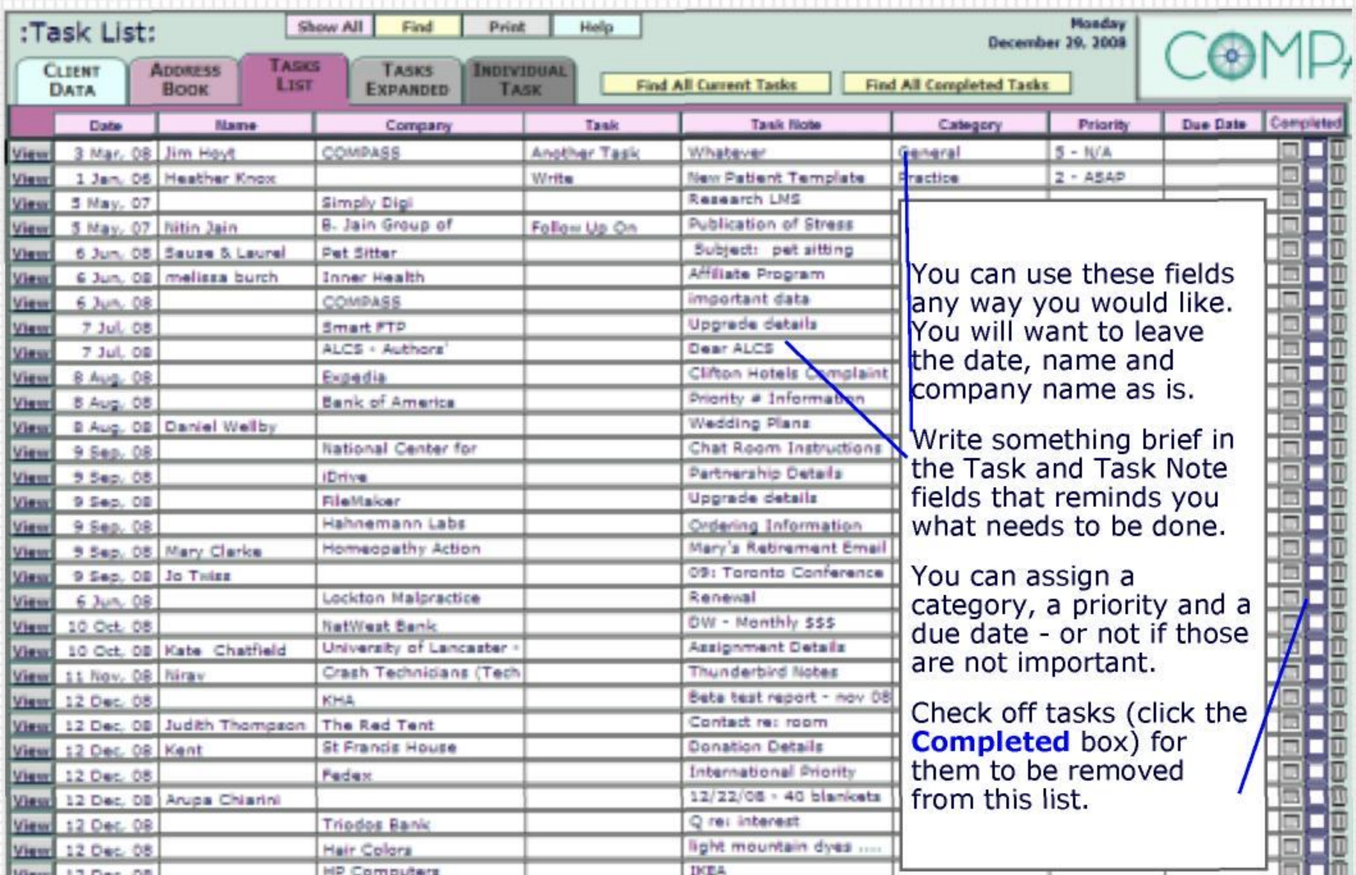
Tasks is everything you need to do that is NOT associated with your patients i.e. all non-client related action items, projects, tasks or whatever you want to call them for friends, relatives, businesses and companies etc.

You can leave all the tasks for a contact or delete them as you complete them. They are handing 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.



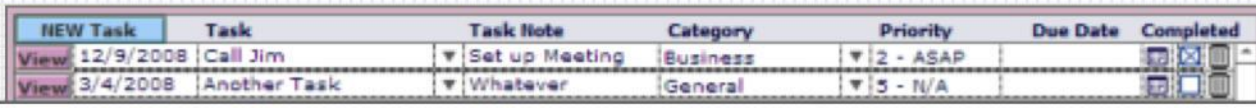
You can use these fields any way you would like. You will want to leave the date, name and company name as is.

Write something brief in the Task and Task Note fields that reminds you what needs to be done.

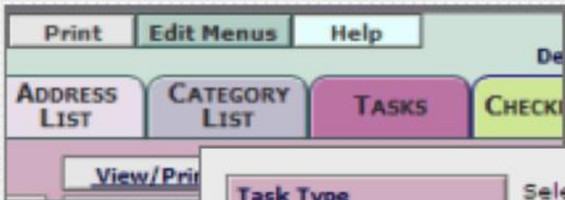
You can assign a category, a priority and a due date - or not if those are not important.

Check off tasks (click the **Completed** box) for them to be removed from this list.

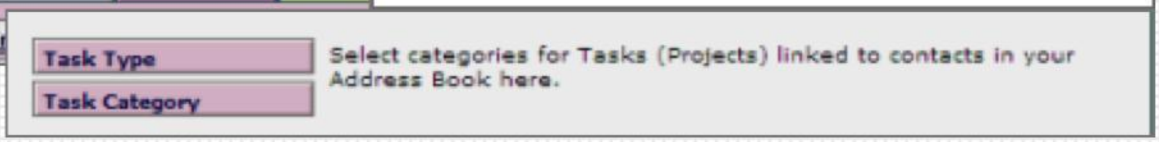
:Tasks Help—More:



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



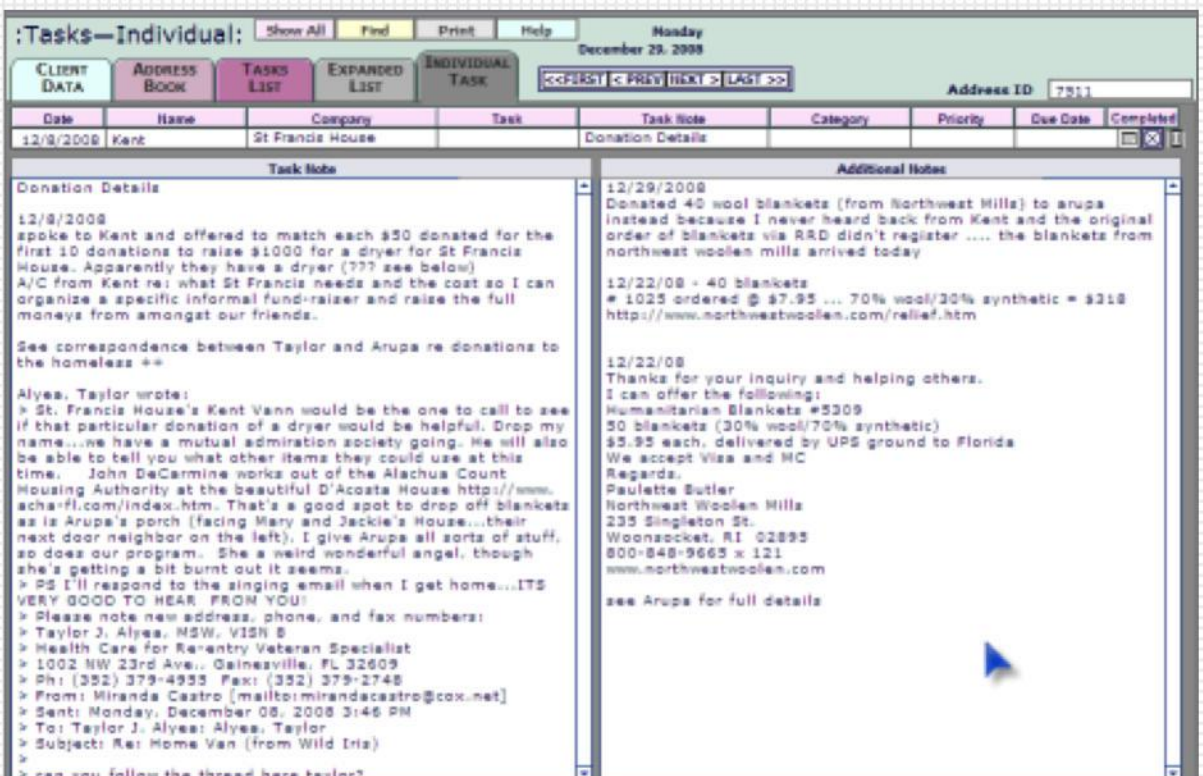
Click the Edit Menus button at the top of the main Address Book screen to add, edit or change the items in the task type and category menus.



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.

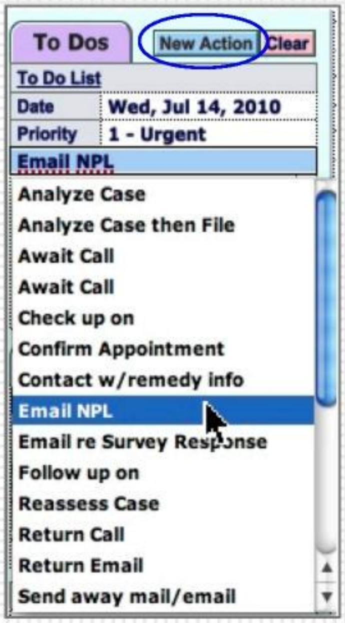
Use these fields for thoughts, information, the important portions of emails etc.

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 -



: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!



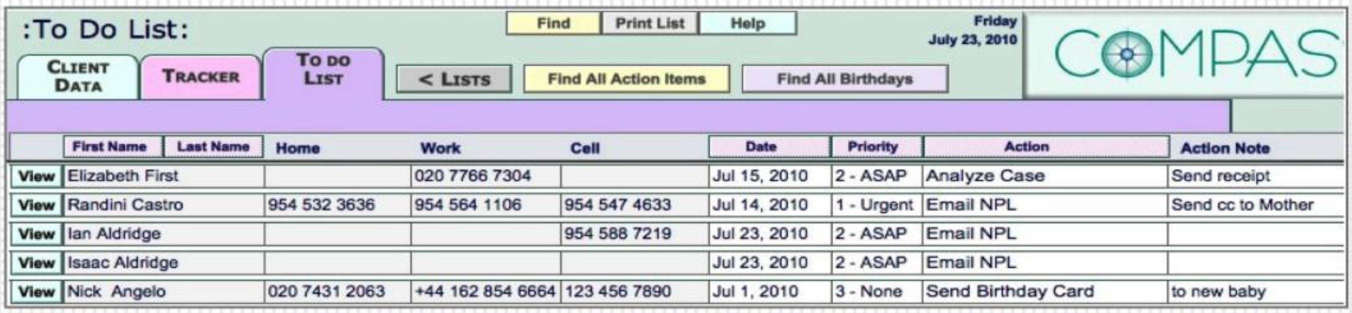
At the Client Data screen use this feature to keep track of all your client related tasks.

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.



	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.

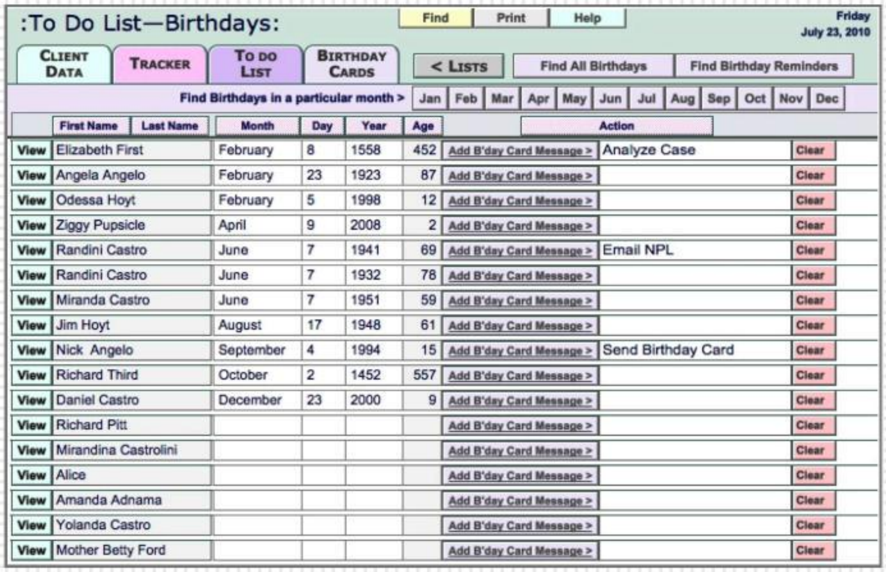
Use the Action Note field (either here or at the Client Data screen to add any additional words about what needs to be done and when.

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.

:To Do List Help—Hints & Tips:

The Birthdays feature is self-explanatory ... click on a month to see the birthdays for that month (sorted by the date) ... click on Find All Birthdays then use the Add B'day Card Message button to add it to the Action Item for that person - then click Find All Birthday Reminders and go to the Cards (click Birthday Cards tab) to send them! Couldn't be easier!



	First Name Last Name	Month	Day	Year	Age		Action	
View	Elizabeth First	February	8	1558	452	Add B'day Card Message >	Analyze Case	Clear
View	Angela Angelo	February	23	1923	87	Add B'day Card Message >		Clear
View	Odessa Hoyt	February	5	1998	12	Add B'day Card Message >		Clear
View	Ziggy Pupsicle	April	9	2008	2	Add B'day Card Message >		Clear
View	Randini Castro	June	7	1941	69	Add B'day Card Message >	Email NPL	Clear
View	Randini Castro	June	7	1932	78	Add B'day Card Message >		Clear
View	Miranda Castro	June	7	1951	59	Add B'day Card Message >		Clear
View	Jim Hoyt	August	17	1948	61	Add B'day Card Message >		Clear
View	Nick Angelo	September	4	1994	15	Add B'day Card Message >	Send Birthday Card	Clear
View	Richard Third	October	2	1452	557	Add B'day Card Message >		Clear
View	Daniel Castro	December	23	2000	9	Add B'day Card Message >		Clear
View	Richard Pitt					Add B'day Card Message >		Clear
View	Mirandina Castrolini					Add B'day Card Message >		Clear
View	Alice					Add B'day Card Message >		Clear
View	Amanda Adnama					Add B'day Card Message >		Clear
View	Yolanda Castro					Add B'day Card Message >		Clear
View	Mother Betty Ford					Add B'day Card Message >		Clear

Action Items Hints & Tips

Even if you are lucky enough to have a brilliant secretary, assistant or office personnel there are still lots of tasks a homeopath - busy or not - has to do on a daily basis.

I use the main Notepad at each screen for jotting voice mail messages and other action items that need my immediate attention i.e. anything that needs to be 'in my face' so to speak.

I use the To Dos to make sure that anything I need to do for a client never falls through administrative cracks in my work day.

I check my To Dos at the beginning of every day - and then at least once more to make sure that I've done everything I said I would do or have to do that day. Clicking the Clear button gives me a sense of happy accomplishment.

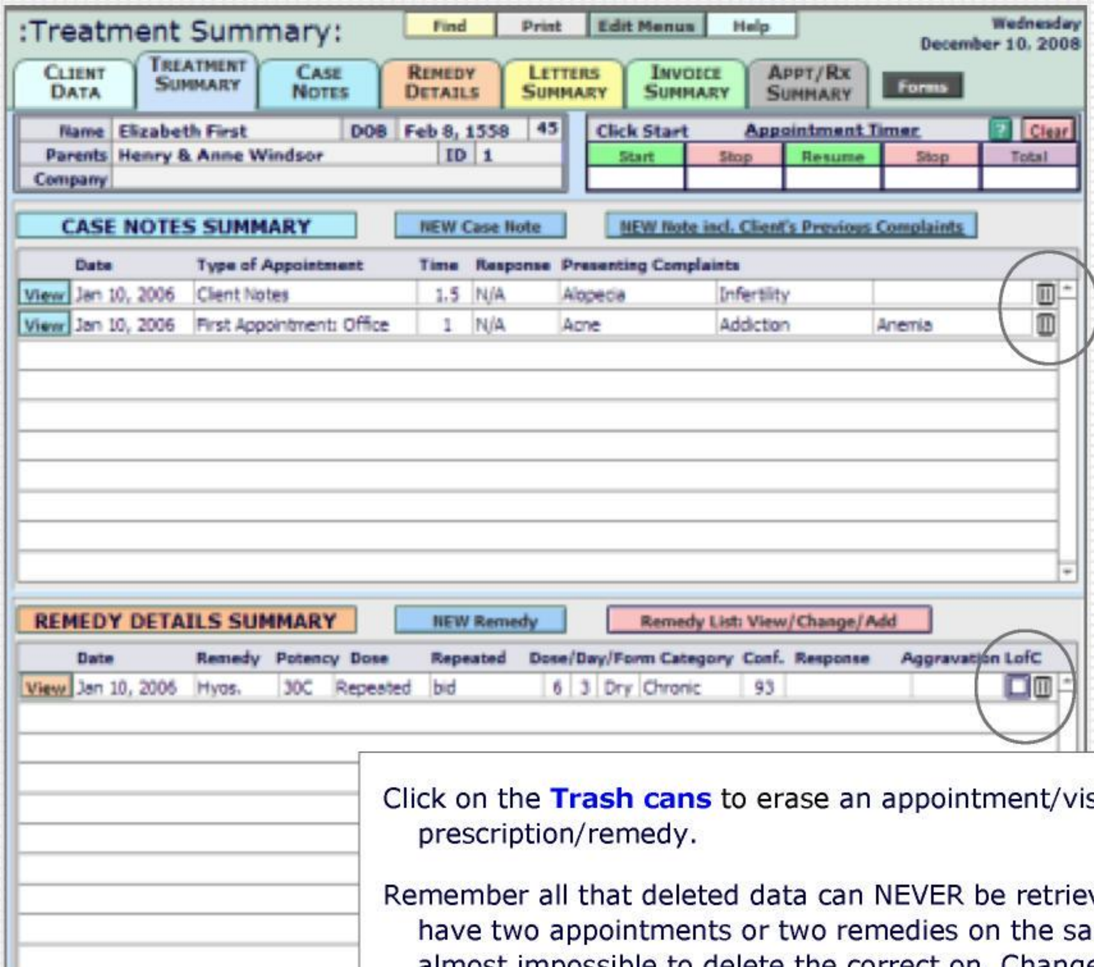
Keeping the number of Action Items down to a dull roar helps me to retain my sanity. It's easy to feel overwhelmed by my practice if I let the Action Items pile up.

I use the To Dos to reevaluate the way I handle certain tasks. At one point I was sending single doses of remedies to patients but not charging for this service. I kept track of how much time I was spending on these and how many remedies I sent out over the course of a month and found out that I was spending an hour a week on average doing this. That's 4 hours a month - a whole half a day! I started charging a fee - which my patients were more than happy to pay - and so was my accountant!

: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.

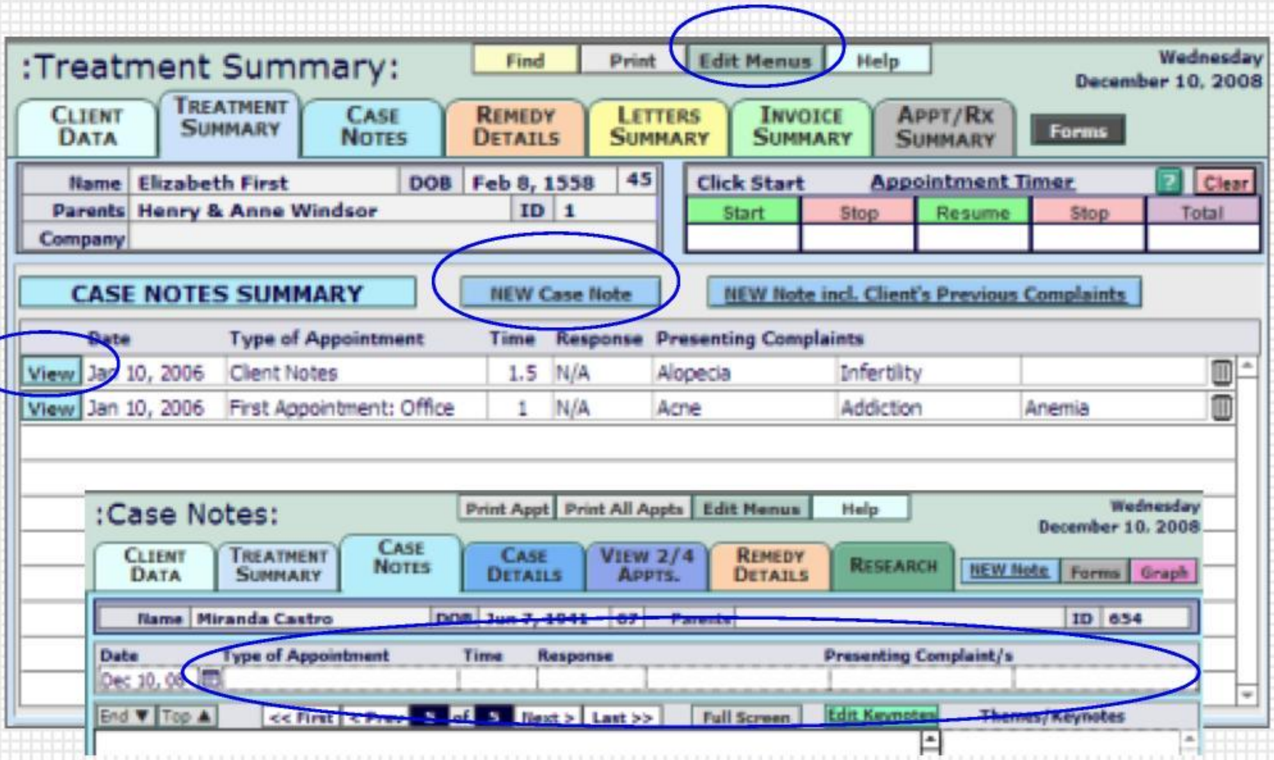
Come here in order to:
- View a list of case notes (appointments/visits/consults) or remedies (prescriptions) for a client
- Create **NEW Case Notes** (appointments/visits/consults) or **NEW Remedies** (prescriptions)
- **View** a specific appointment or prescription.
- **Start**, **Pause** or **Stop** the appointment timer. (See Appointment Timer Help - at right)



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 on. 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.

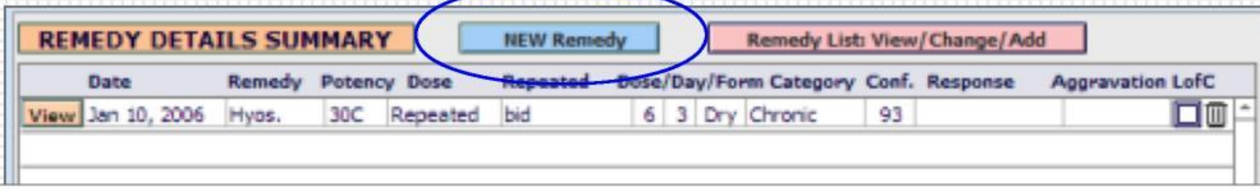
The **Time** field is a drop down menu. Click in the box and you can select different time periods. Click on the **Edit Menus** button (at top of screen) to add your own time period options.

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).

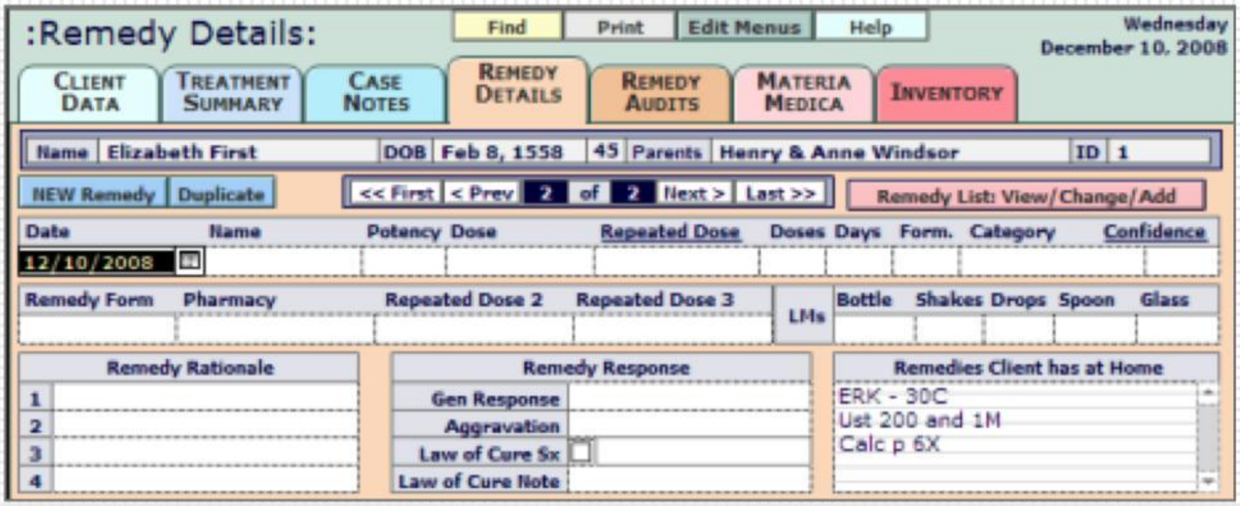
Be sure to fill out the **Presenting Complaints** fields, it will allow you to do interesting research on the composition of your practice in the future. COMPASS comes bundled with a list of complaints - click the **Edit Menus** button (at top of screen) to add or edit this list.

The client's name, ID#, DOB and age are automatically inserted from Client Data

:Treatment Summary Help—Remedy Details:

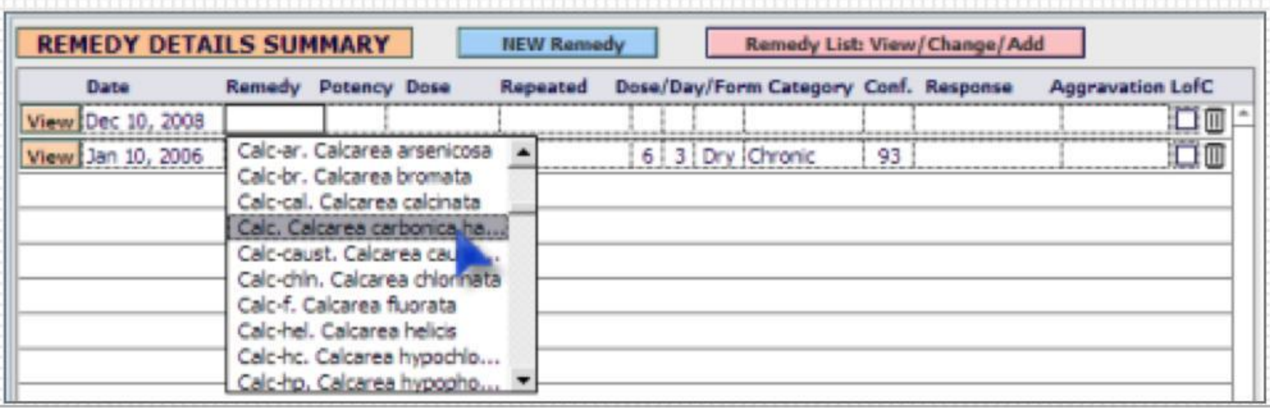


Create (give) a new remedy to a client by clicking on the **New Remedy** button. You will be taken immediately (and automatically) to the **Remedy Details** screen - to a new (blank) prescription for this client with today's date automatically inserted.



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.



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.

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.

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.

: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

" 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

JUST DO IT

NOW

:A Map of the 'Tabs' in Compass:

COMPASS

Download Pdf

CLIENT HOME PAGE
All data in one place

- Client Data
- Calendar
- Settings
- Directions
- Organon
- Photos

CASE NOTES
Record
Analyze
Summarize

- Treatment Summary
- Case Notes
- Case Details
- Forms
- Photos
- Rep. Graph
- Vitals/docs

REMEDIES
& everything do with the them

- Remedy Details
- Materia Medica
- Remedy List
- Inventory

COMMUNICATE
Mail/Email
Envelopes
Labels

- Letters & Emails
- Envelopes
- Mass Mailing
- Labels

LISTS
Keep track of everything

- To dos
- Tracker
- Appt/rx Summary
- Client Lists
- Referrals
- Locum Data
- Daily Log

PERSONAL CONTACTS
Separate from clients

- Address Book
- Phone List
- Email List
- Category List
- Contact List
- Tasks
- Birthdays
- Directions
- Emails
- Envelopes
- Labels
- Letters
- Photos

TRACK ALL PAYMENTS
Your client invoices

- Invoice Summary
- Invoice Data Entry
- Invoice
- Statement

FINANCES
Income
Expenses
Reports

- Checkbook
- Payments Due List
- Price List
- Financial Reports

REPORTS & RESEARCH
The heart of Compass

- Outcomes Audit
- Remedy Audits
- Age & sex report
- Complaints report
- VAS Research
- Well-being Research
- Complaints Research
- Research

This map includes many of the **TABS & BUTTONS** you'll find as you navigate your way about COMPASS.

Click on the tabs in this Map to get Help with that screen or section.

Click on the COMPASS logo at any screen to return to this map.

Buttons and tabs are interchangeable. The bottom buttons at the Client Data, Address Book and Invoice screens for example, are so that you have many navigation options in one place without having to go from one screen to another.

: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.

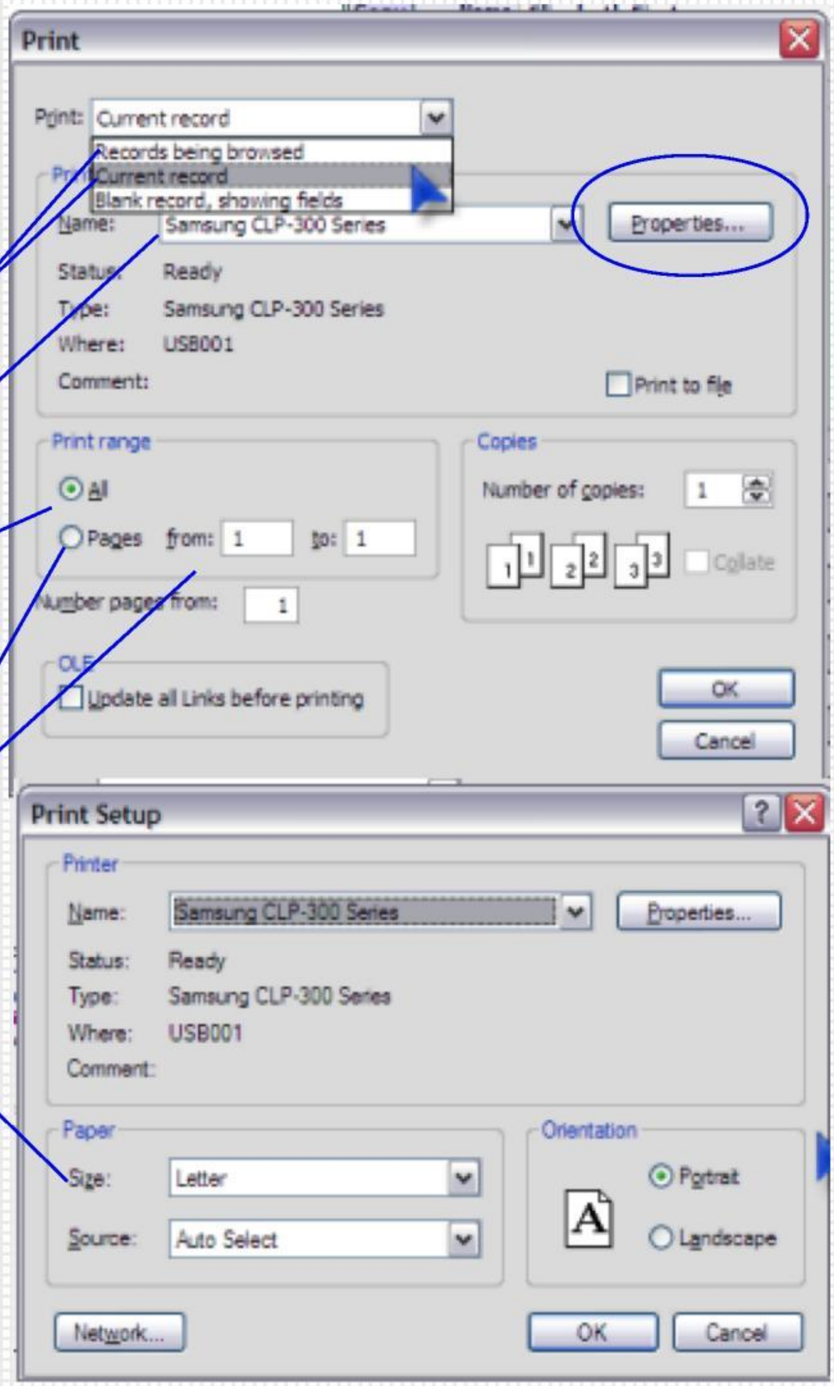
Resizing your screens works differently on each platform:
Macintosh - grab the screen (bottom right hand corner) and resize.
Windows - click the minimize button first and then grab the screen and resize. You may need to use the scroll bars to find that bottom right corner.

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. If 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

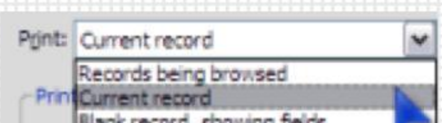
Print Current Record if you just want to print one letter or invoice etc.

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'.

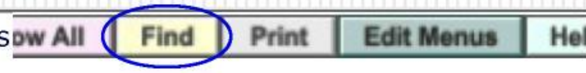
Paper size - double check this to avoid wasting paper (click Properties to do so)



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.

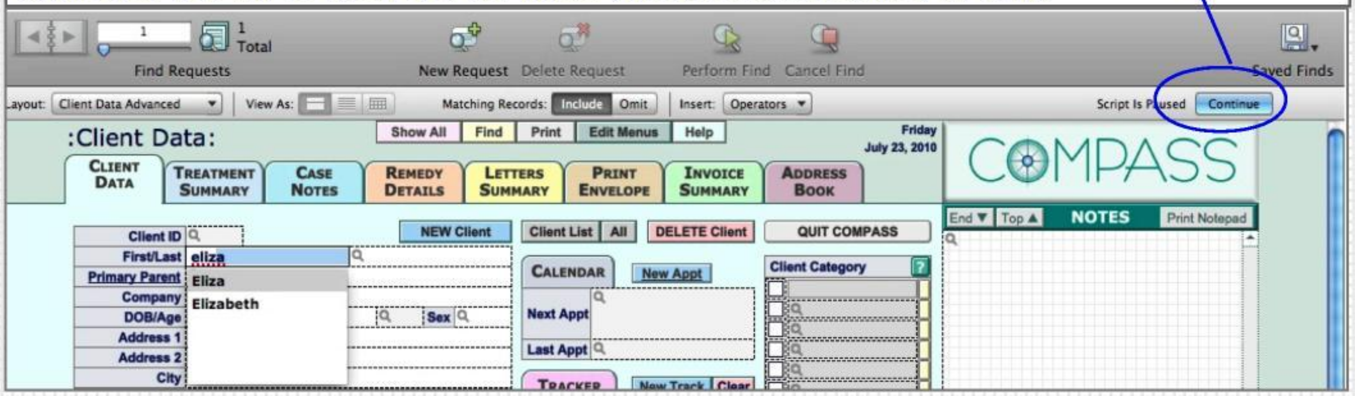
:Searching:

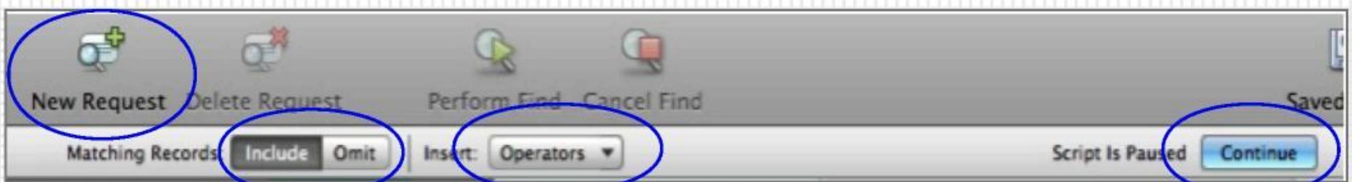
Click the yellow **Find** button at the top of most screens



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.

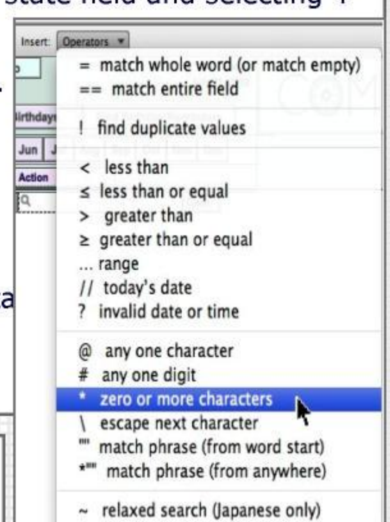




Use **New Request** to add to a search to string 2 or more searches together.
Examples: Find clients from 2 (or more) states...Florida and Georgia. Click Find and enter FL into the state field then click Ctrl/Cmd+N (or **New Request**) and type GA into the same field then click Ctrl/Cmd+Enter (or **Continue** 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.

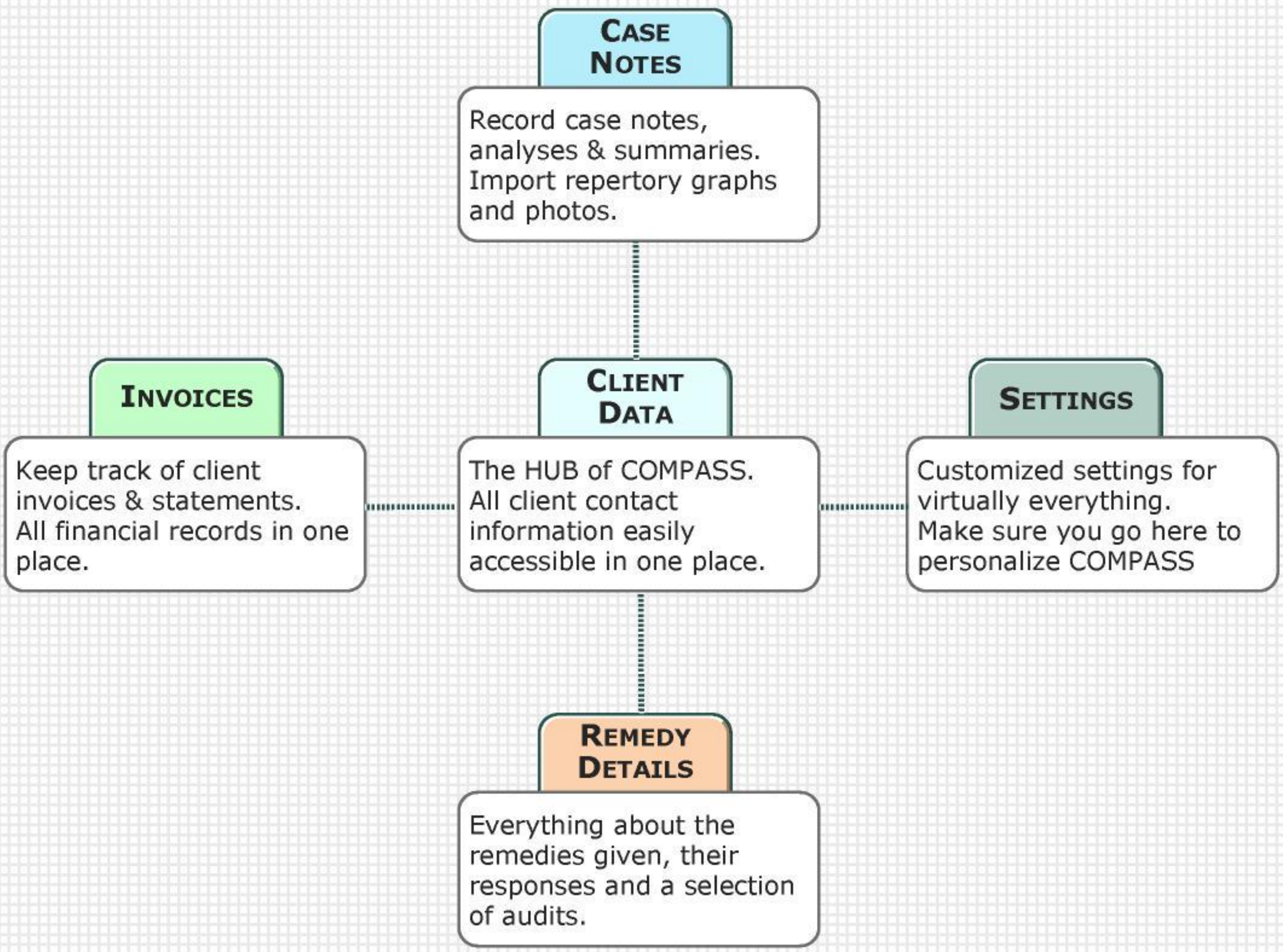
:Structure—Basic:

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:

Monitor your results through: **Practitioner based Audits**

General responses, individual remedy responses, sex ++
Client based Research

Record **Case Notes**, **Analyses** & **Summaries**.
Import repertory graphs & photos for each visit.
Helpful summaries including: Referrals, Treatment, Locum data ++

Keep your **personal contacts** separate from your clients. Send letters or e-mails, keep track of birthdays & projects etc.

Customize letters, envelopes, create client groups & more.

Keep track of all **financial transactions**: Client Invoices, Statements, Payments Due, Bank Account (expenses).

Photos can be inserted for each client and case note.

Send Letters or E-mails, print envelopes or labels for one client or a group - or all your clients!

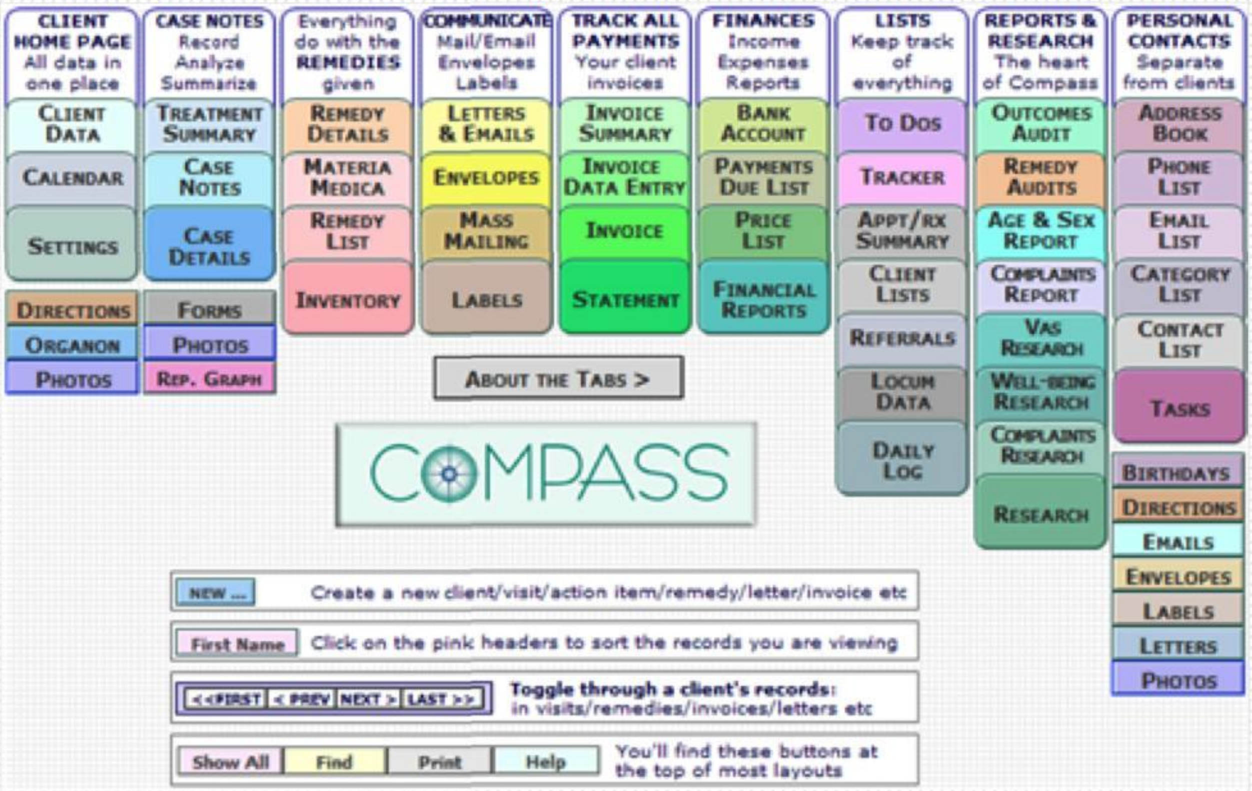
The **Calendar** is linked to your clients. Lists galore help you keep track of your clients and follow through on all tasks.

Everything about the **Remedies Given** & their responses.
Create your own **Materia Medica** - including photos, cured symptoms and cases and seminar notes etc.

Keep track of the remedies in stock with the **Inventory**.

: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.

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

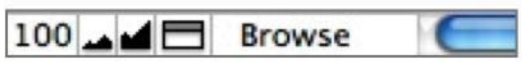
COMPASS automatically saves:
- every 5 minutes.
- when you click a tab or button or go to another field or screen

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!

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.)

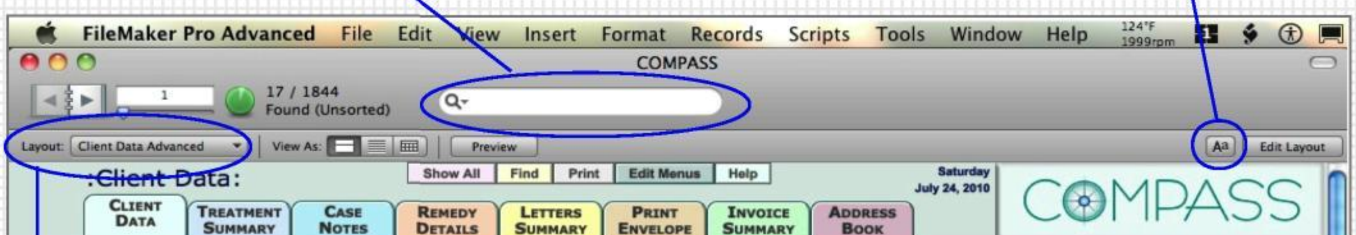
In Client Data the Rolodex show the numbers of clients, in Remedies how many prescriptions (for one or all your clients), in Invoices the number of invoices, in Address Book the number of contacts and so on.

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.

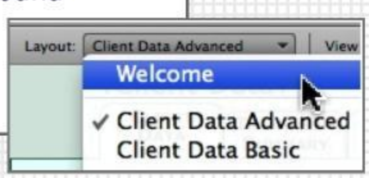
Show or hide the Formatting Bar (Right Click for the same options or go to the Format Menu).



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.

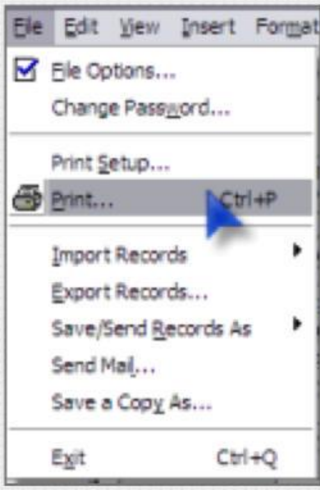
An exception to this is to return to the Welcome screens.



10. The Menus

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.

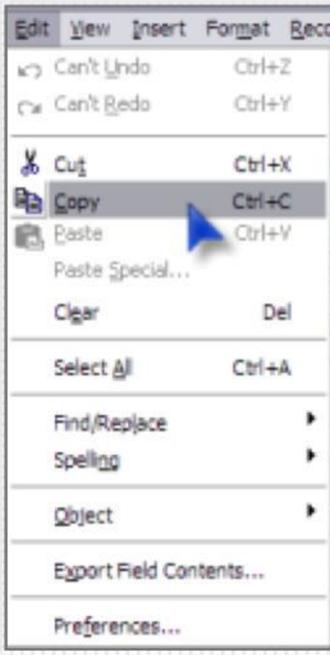


The File Menu

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.

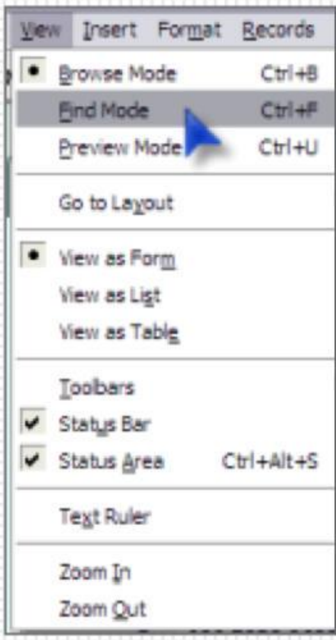
You can exit COMPASS using this menu and you will still be prompted to back up!



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.

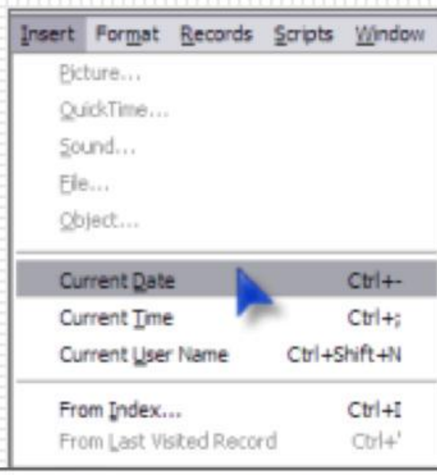
That's it for this menu - Find/Replace and Export Field Contents is for advanced users only.

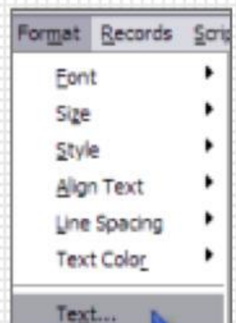


The View Menu

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.

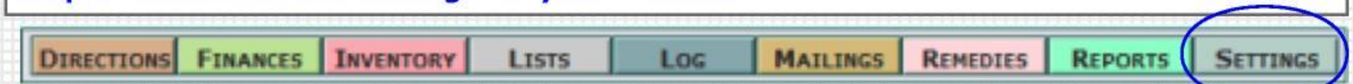
1. **Customize the Settings for your Practice**
2. **Add a New Client**
3. **Schedule an Appointment**
4. **Enter a New Case Note**
5. **Create a New Remedy**

Your Next 5 Steps could take a little longer the first time but with 'practice you'll get quicker and quicker.

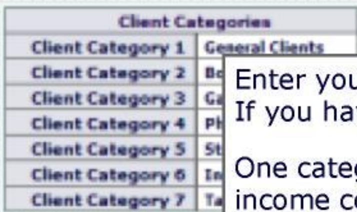
6. **Issue an Invoice**
7. **Make a Payment and Send your Client a Receipt**
8. **Send a letter with remedy instruction**
9. **Send a email appointment confirmation**
10. **Fun Stuff**

: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.



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.

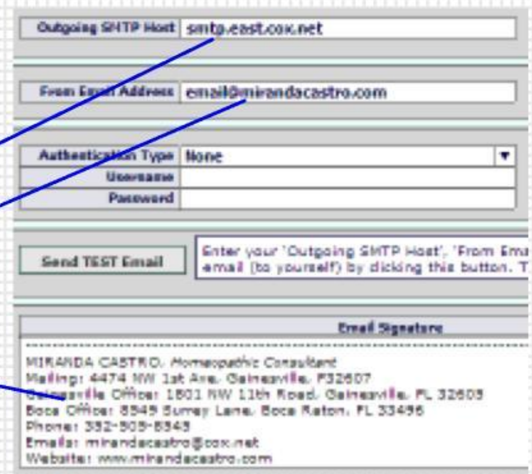
Click on the Email Settings next and fill out the first two fields:

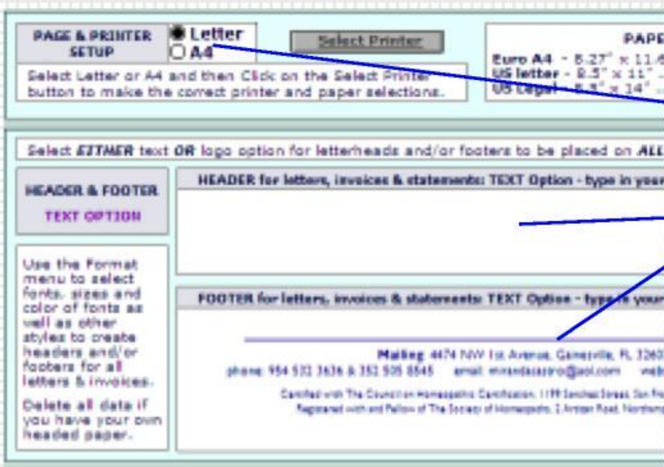
Your outgoing SMTP Host first (you'll find that in the Help Manual under Emails - ISPs List).

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.

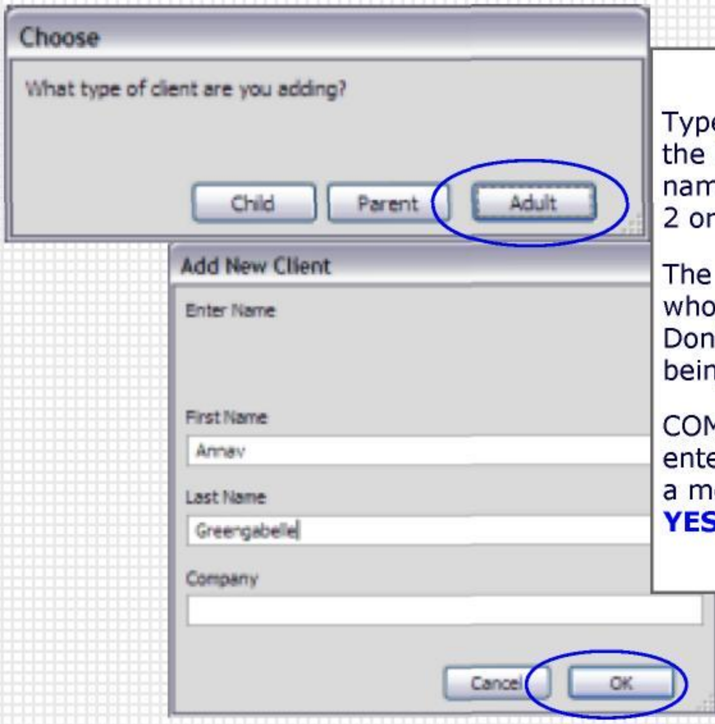
Then type in a header and a footer. We've put some words in the header and the footer to help you get started.
You can insert your own logo in the header and/or the footer if you prefer.

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

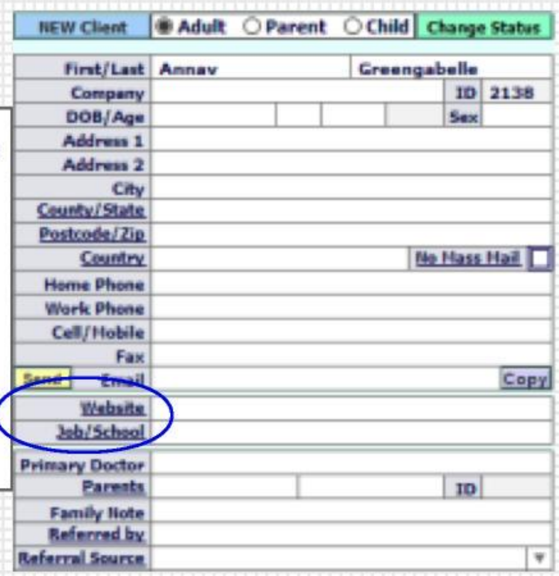
NEW Client Click New Client then click Adult in the next dialog box.



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.

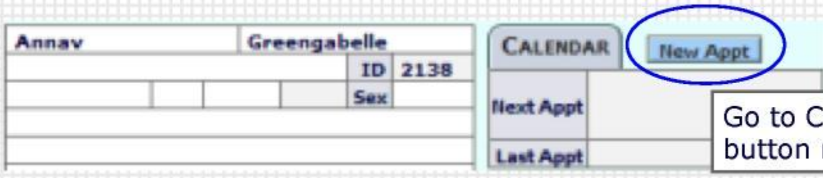
These fields are customizable - you can use them for a 2nd email address or website and for recording a client's work or other situation.

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 3—New Appointment:

Step 3: Schedule a New Appointment for your New Client!

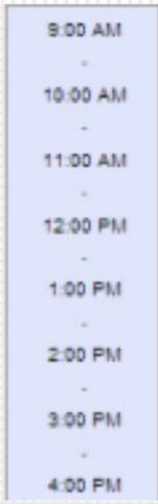


Go to Client Data and click the **New Appt** button next to the Calendar tab.

Clicking New Appt takes you to today's date.
The Calendar tab takes you to the last date you were viewing.

You are now in the day view of the Calendar.

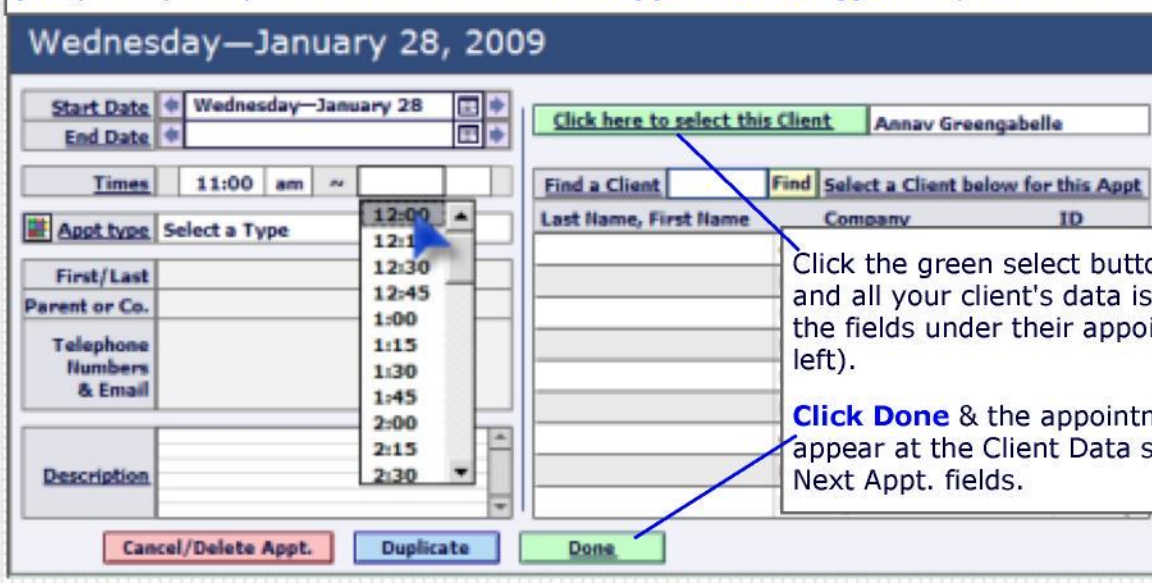
Click on a date in the calendar (at right) to select it.



Scroll up and down the time bar (at left of screen) slowly - see how your cursor changes into a hand and back to a cursor as it rolls over the quarter hours.

Click on a time in the Time Bar to select one - and will be taken to the Edit Appointment screen with the 'start time' already entered.

Select an **end time** & press the Enter key - you are taken automatically to the next field. Select **pm** (or am) and press Enter then select the **Appointment Type** and press Enter



Click the green select button one time and all your client's data is entered in the fields under their appointment (at left).

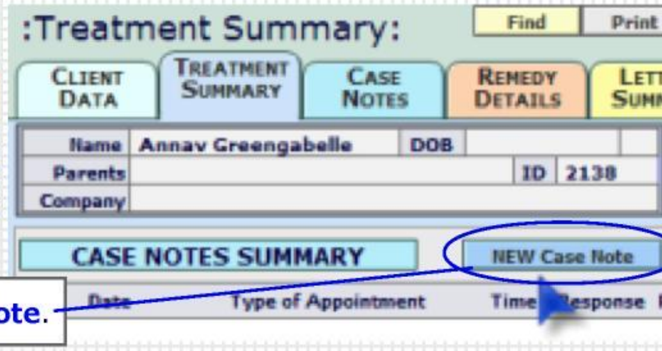
Click Done & the appointment will appear at the Client Data screen in the Next Appt. fields.

If you are feeling adventurous click on the green Calendar Settings tab to check the the settings and change any to suit your preferences.

: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. *

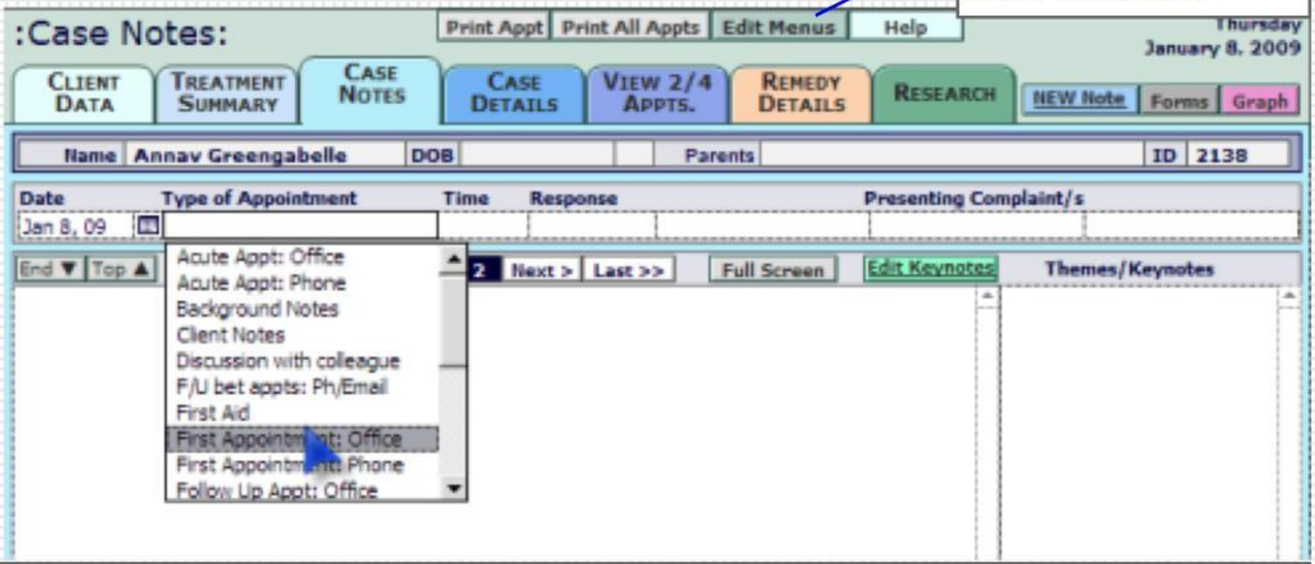


Click **New Case Note**.

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.



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.

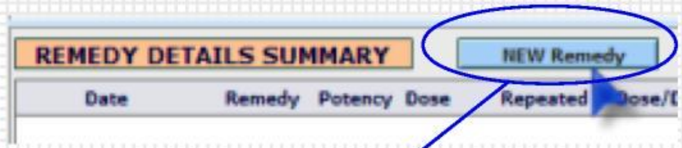
Check out the Full Screen next - some people prefer to take cases using this one.
See which one feels the most comfortable to you, the easiest to work with.

* 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

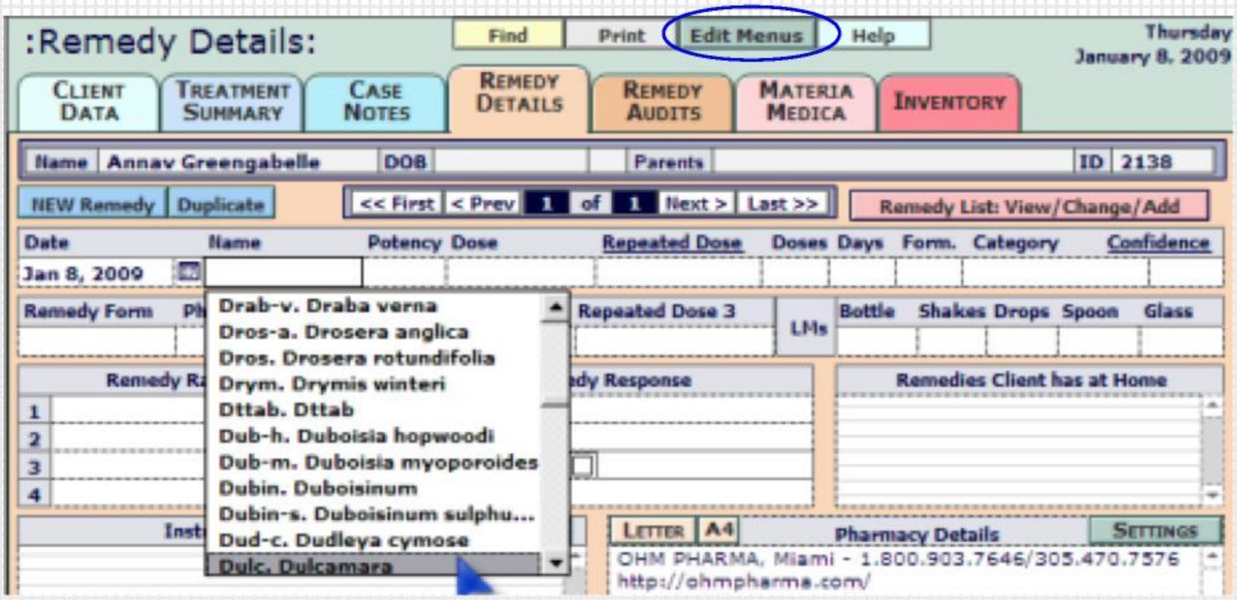
Go to Client Data and click the **Treatment Summary** tab. *



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.

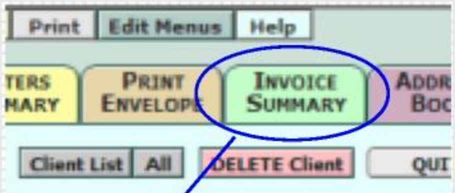
That's it! You've entered a new remedy for your client.
Now have fun getting familiar with the various tabs and buttons at this.

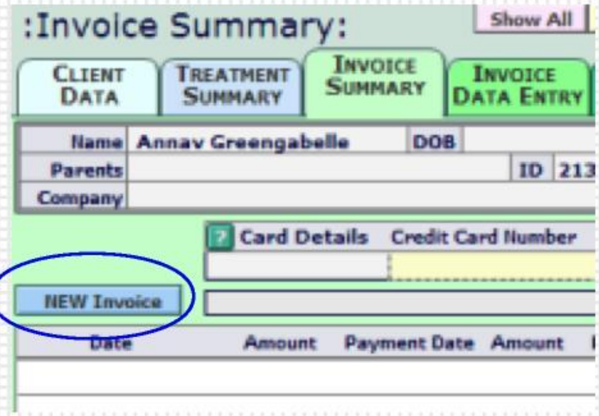
Click on some of the other tabs to see where they lead you.

* 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.

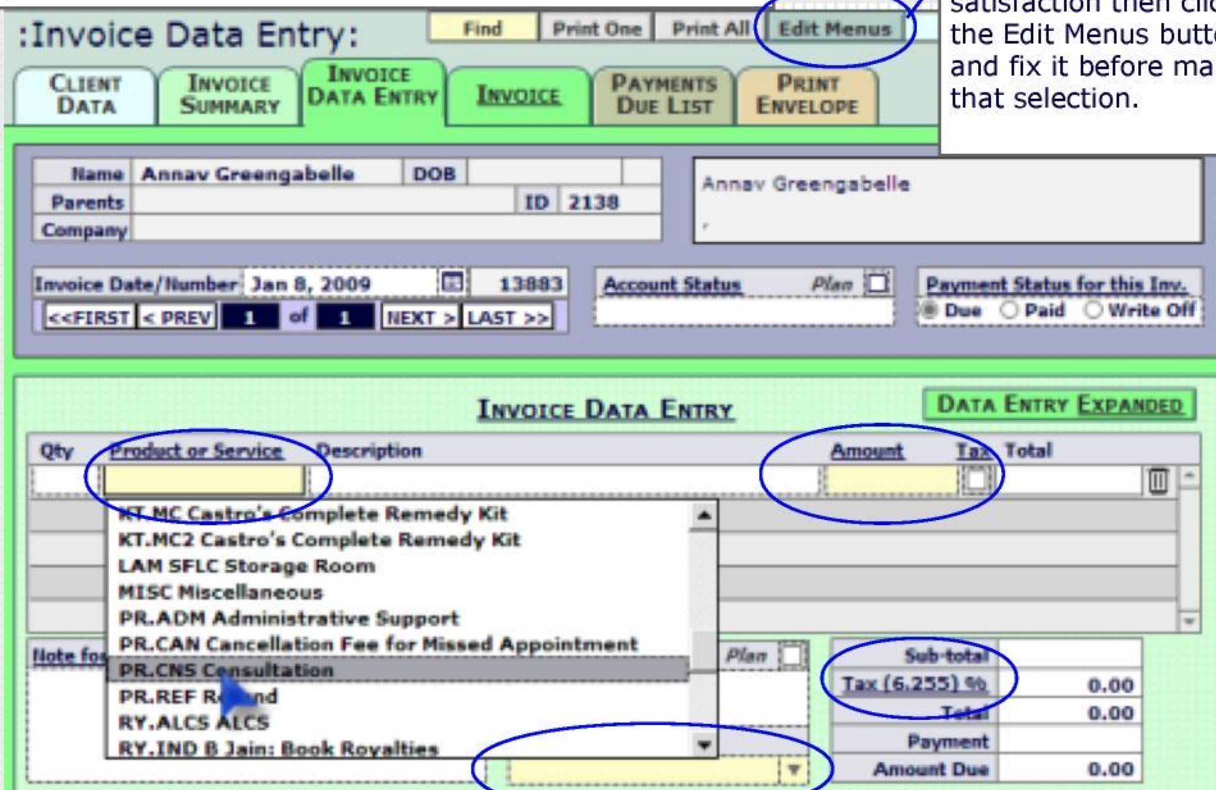




Click on the **Invoice Summary** tab in Client Data, and click the **New Invoice** button.
A new invoice will be created and you will be taken to the Invoice Data Entry screen.

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 Menus button and fix it before making that selection.

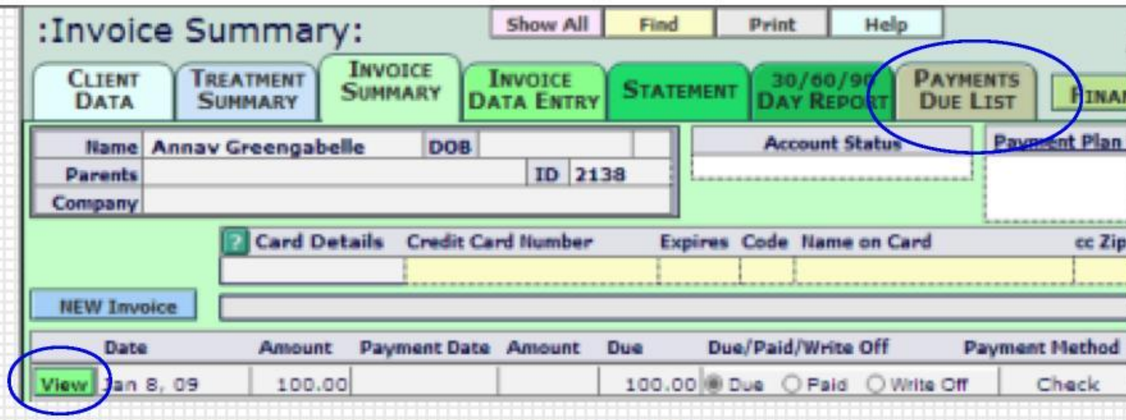


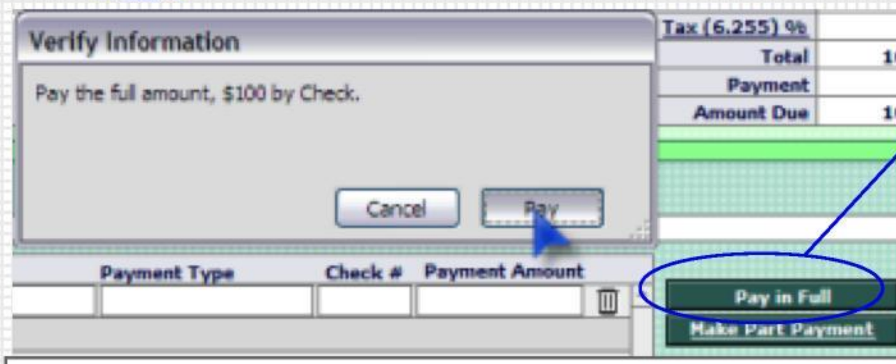
Spend a couple of minutes familiarizing yourself with this screen. Click on Settings and enter in your primary tax or VAT amount. Then return to this screen and check the Tax box - see what happens. Change the tax amount at this screen (type in a different amount in the Tax line (above Total/below Sub-total) and see what happens! Now uncheck the tax box.

:Step 7—Pay Invoice:

Step 7: Make a Payment and Send your Client a Receipt

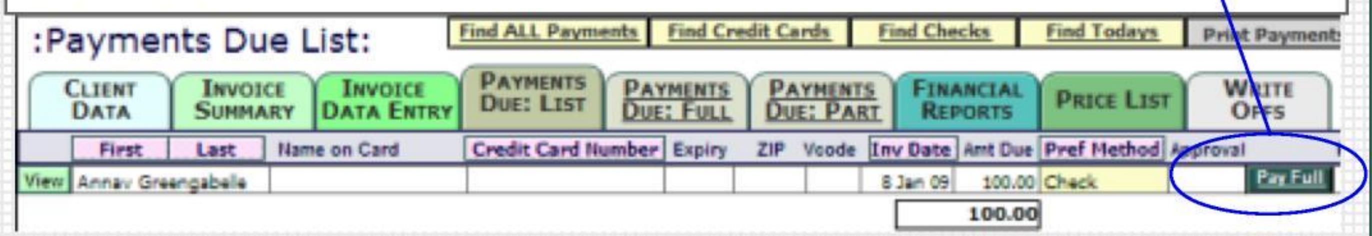
Go to the **Invoice Summary** screen - you'll see the $100 charge listed there.
There are two ways to pay this (and to pay any invoice):
1. Click the **View** button next to the due Invoice to go to the Invoice Summary screen.
2. Click the **Payments Due** List tab to view and pay it there - this screen is good for 'paying' multiple invoices.



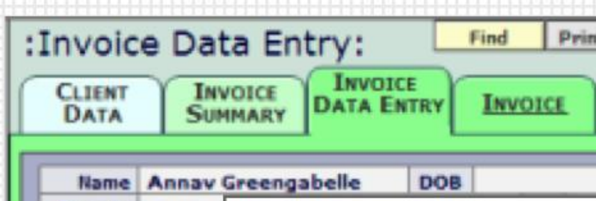


1. At the Invoice Data Entry Screen click the **Pay in Full** button and then click **Pay** when asked for ALL information to be automatically entered (today's date, the correct/full amount and payment type).

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'



The payment status will be 'Paid' instead of 'Due'



Click on the Invoice tab to print a paper or pdf copy of this client's invoice!

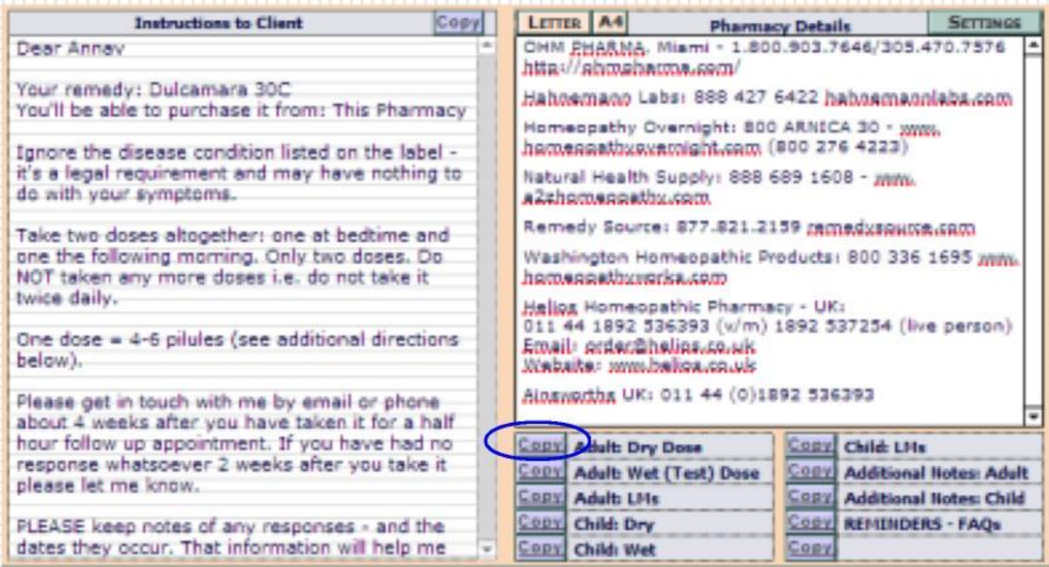
:Step 8—New Letter:

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.

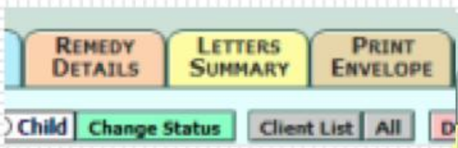
You can add extra notes by clicking the copy button next to another template and that will automatically appear after the first one.



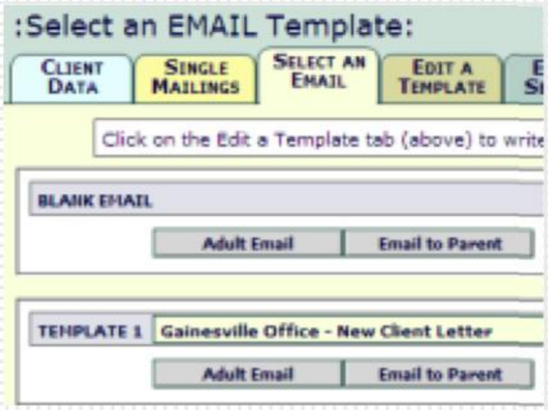
Click the orange Letter (or A4) button to view your Instructions in a letter where you can edit it further and/or just print it out to give or send to your client.

:Step 9—New Email:

Step 9: Send your client an Appointment Confirmation by Email

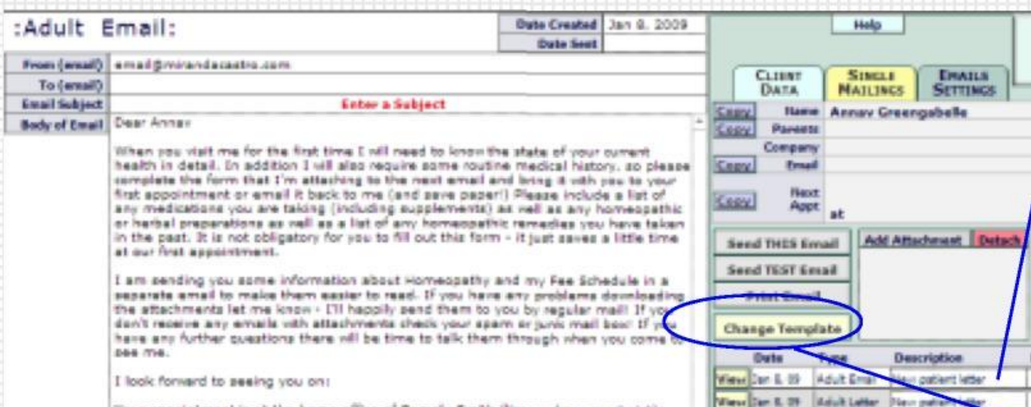


Click on the yellow **Letters Summary** tab in Client Data and then Click **New Letter or Email** and select **Email** when asked.



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 works a little differently - start typing and it will recognize a word or phrase you've typed before. Or not!

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!

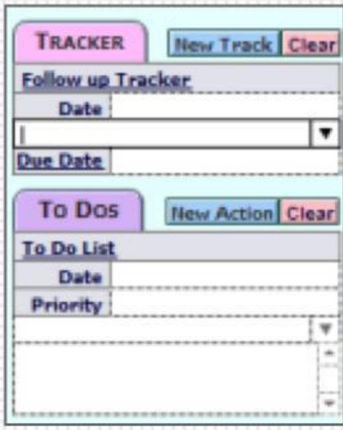
Once your templates are perfect you'll find you can save yourself hours of work each month with this feature alone. Confirming appointments is excellent business practice - your number of 'no shows' will drop to virtually nil.

: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.

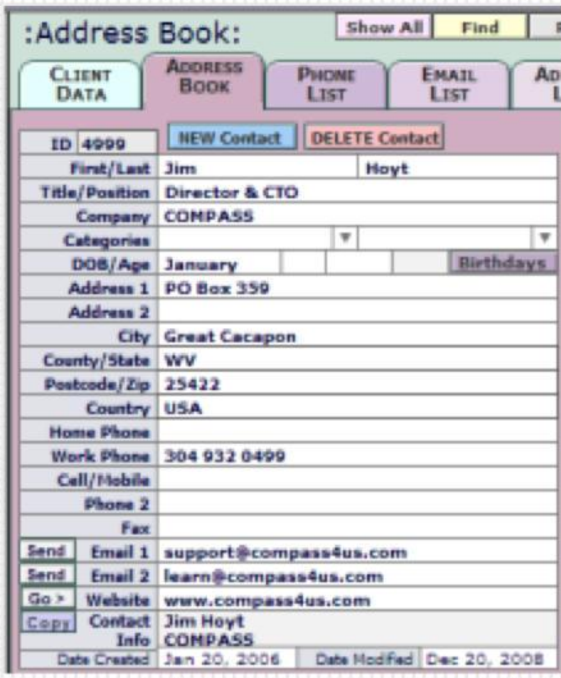


Tracker. Click **New Track** and a note about following up with this client. Add a due date if relevant. Now click the Tracker tab and find it (Clue: click the Find all Clients with follow up notes button).

To Dos. Click **New Action** and select a priority etc. Click the To Dos tab to view it in a list!

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.



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.

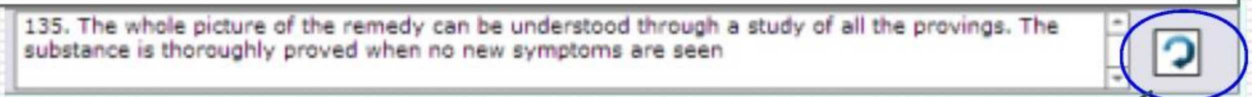
Now put a photo of yourself in your own Photo Album in the address book.

Give yourself a Task - a project and make it time sensitive.

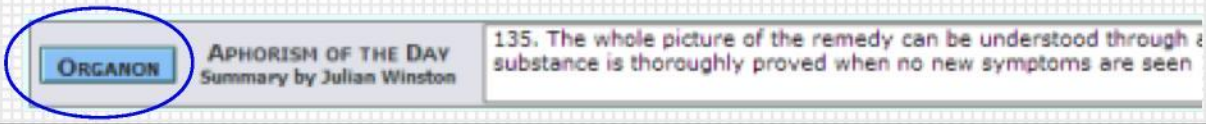
CONGRATULATIONS - you're a pro now! Enjoy all your journeys - homeopathic and healing, with or without COMPASS. Please let us know what is particularly helpful (we'll make it better if we can), tell us what doesn't work (we'll fix it), and also what you wish it could/would do (we'll listen carefully 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.

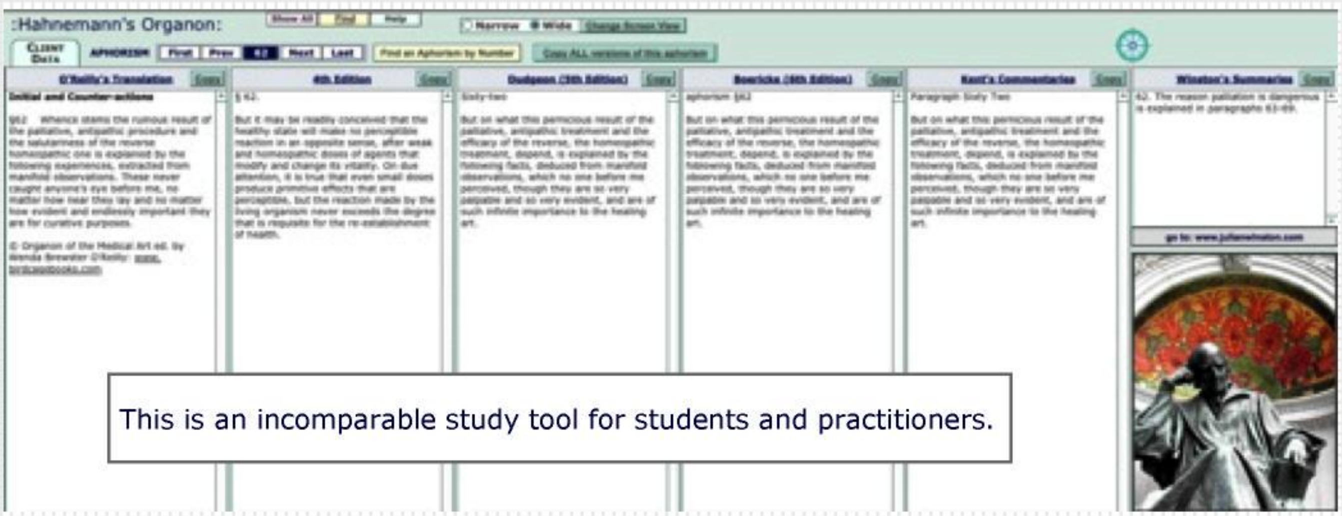


Click on the icon to select another random aphorism.



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



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

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