

Clinic Software The Latest Jane App - Ref211

Steven Bruce

Good afternoon. Welcome to a lunchtime special from the Academy. We haven't stopped doing the free CPD. So once a month, we are doing at least one free CPA show to anybody who cares to register. This is an additional one in our calendar. And today we're going to be looking at online diaries, online clinic notes. And to help me with that I have got in for the second time, Jamie 30. Jamie, hi, good to have you with us and a great way to shake hands, it really is not legal. So as Jamie was on the show, just over two years ago, in fact, when he came and talked to us about the gene app, the clinic software, which we use in my own clinic, he's not here specifically to talk about Jane today, but to talk about the benefits and the perils of using online systems. And what we'd appreciate from you is your feedback on the systems you're using. If you are using Jane, whether you like it when you don't like it, what do you think it should do to improve and any upsets or traumas that you've had through using online notes? And perhaps Jamie will be able to help us out in how to get round losing? So over two years, Jamie, has gene changed in that time?

James Purdy

We've done nothing? No, we've done a lot in the last couple of years. Yes. So since I was last year, in fact, I think we've rolled out a lot of features that are kind of specific to COVID in the new world around which we find ourselves. So one thing, especially at the start of the pandemic was this COVID screening questionnaires that suddenly every company in the world was asking people to complete and very pleased to say at the very start of the pandemic, Jane was able to roll out this specific feature to kind of help people automate that process, which was quite nice.

Steven Bruce

So a lot of people who are using clinic software, they're going to know what you mean by that. For those who aren't already using this sort of system. Presumably, this is just a template which you call up or you send the patient.

James Purdy

Yeah, exactly that. So it's the kind of if you aren't using this kind of system, you may every single person that turned up, you may have to ask them a few questions. Have you travelled recently? Do you have a temperature those kind of questions. And this feature would allow

you to fully automate that process. So it would be kind of an email template that you can put together. And just ensure that before every single appointment, there's an email sent out with a link for someone to click open this questionnaire and tick. Okay, so you've got that on my screen now. Yes, indeed.

Steven Bruce

So let's have a look at that on our own screen. And

James Purdy

so I'll back up one second, just to take a look at that. But this kind of thing. So you can piece together this email where you can choose the title of the email. So mandatory COVID-19 screenings kind of default title. So you can see in there, a nice little like welcome introduction, the reason that this email is being sent and then piecing together some of this default language is slightly Americanize like, Do you have a fever rather than a temperature. But it's just a nice tool that you can kind of customize. And just make sure that you're asking those questions.

Steven Bruce

Right soon. If only if only it was someone who's not using cleaning software? am I likely to find any providers of software who don't give you this sort of thing these days?

James Purdy

And yes, I'd say quite a few. I know this is something that a lot of people still do manually. So we've got lots of people that scramble every single evening, they're manually texting the patients or their front desk are calling the patients and asking the questions and leaving voicemails and then hoping to get calls back. And so lots of people haven't found a solution for this other than just a lot of manual work, or building your own email templates, maybe something like that. Whereas this is something we were just able to add. So you can set this up.

Steven Bruce

I decided I didn't want to question four or question five, can I take it off?

James Purdy

Yeah, totally. So this little ellipsis, we can see at the end, these three little dots. This is how you can kind of customize the order the layout. So we've got this little rubbish bin icon, if you say actually don't need that question. You can get rid of that. And it's gone. Every single bit of language on here is fully customizable, as well. So you can click to edit the templates, rename the questions, re label the questions, add additional options, it's, it's really nice. And once you put in the 510 minutes to set this up, it's a huge time saver to avoid those those phone calls those manual emails and checking.

Steven Bruce

You said earlier on, but some clinic owners are sitting down of an evening manually texting all their patients. Yep. And then you switch cunningly, to emails, can Jean do texts to patients,

James Purdy

we can do text message reminders to patients at the moment. So that's, they're pretty simple. Actually, I can show you what they look like they're free of charge. So we don't charge for these reminders. So we've got an example here that say this to our text message,

a preview this just to show kind of thing that we can send out. So it's going to be short and sweet your appointments in a couple of hours, or 24 hours. That's what we can offer at the moment. We are working on a couple of new features. And

Steven Bruce

which I mean, I imagine that the bigger providers, I'm trying to make sure that this isn't a sales plug. Yes, absolutely. People might not want to use general, they might have a different system already. But I imagine the bigger providers are offering this, but certainly the system we use in the academy for contacting our members and so on does not allow us to send text messages free of charge.

James Purdy

Okay, I think Jane's, in fact, all the software that I'm aware of anyway, I don't believe anyone offers it free of charge, I believe most places have like you buy bundles of credits, like 10,000 credits, so and then the more you buy the kind of cheaper it becomes per message. But with Jane, we just kind of roll it into the subscription for people. So they're pretty basic. there's not loads of fancy features related to text messages with Jane, but for appointment reminders, free of charge, and they're going to send those

Steven Bruce

ways for the patient desperately want LinkedIn messages do some people need

James Purdy

to, but most people likely not. Yeah. And yeah, we just include it in the subscription cost. So you never need to worry about that kind of extra bill.

Steven Bruce

What do you find are the main attractions of clinic software for osteopaths, chiropractors, and

James Purdy

the unable to a lot of the work that's been done manually on paper over the years. And it's one of those things, I think, the longer you take to make a transition, the bigger that transition becomes. And it's kind of a worrying thing to switch away from something you've done for 1015 20 years plus. So I think when people realize the power of being able to just use your mobile phone, if you want to completely run your practice, to write your clinical notes on there to kind of store your clinical notes, check emails, reminders, all of that can be done from your smartphone or from from a laptop like I am now just through your web browser. It's absolutely huge. And the amount of the amount of time, I'd say is the big thing that it's going

Steven Bruce

to be, it's going to be quite a deterrent to people, though, that if, if someone's been in practice for 20 years, and all their notes are on bits of paper, to suddenly switch over to clinic software is going to be a real challenge, isn't it? Because yes, you're running, then you're running two systems. Yeah. And and somewhere, you still got all those paper records in case so and so comes back after 678 years or two years or something, and you've got to go and pick up there.

James Purdy

Now that's very true. And it's something we hear a lot. And it's most people that we speak to who are in that kind of situation, they reach a point where they realize it's just not sustainable

anymore. Like maybe they're running out of filing cabinet space in their spare bedroom, and they realize the notes are just piling up and piling up, and it's hard. And then you've even got the I don't like to speak about worst case scenarios. But if something catches fire, physically, those notes are gone, those records are gone. Whereas happens, an online system where the notes are completely stored online securely.

Steven Bruce

So can you then given that we've now we all know how much more secure online systems are, except for the back there are a whole lot less secure, aren't they reassure those people who are GDPR. Cautious that everything that's necessary is done to secure all this detail from the unwanted prying eyes.

James Purdy

Yeah, absolutely. So all the data stored in secure data centers online, it's the most simple way to explain it, we use the same kind of level of security that your bank would use to kind of encrypt financial transactions. So all the data stored in UK Data Centers, so for all of our UK, and European accounts, everything stored in the UK. And the nice thing is that even again, speaking of worst case scenario, if your paper notes, catch fire, they're gone. If something horrible happens at one of these data centers, they're structured in such a way that we just flip your account to another physical location in a GDPR compliant data center. So you don't lose access to your account. Your notes are still there. And you can kind of pick up exactly where you left off.

Steven Bruce

I didn't ask you last time what happens when your power supply or your internet goes down at your own clinic?

James Purdy

Yeah, that's that's one of those things when people still they do and the nice thing is when your internet's restored again, you can scan copies of your paper notes into Jane, which is quite nice oriented. Any other online software, I'm sure. But yeah, it is one of those things, if your internet goes down, your internet goes down for online systems, you would not be able to access it through that device on that internet connection. Most people in most networks, hopefully these days have a kind of backup mobile phone connection at the very least, which is the nice thing because James Webb base there's nothing to download and install. So if your hard wired internet connection goes down, hopefully you've got fine

Steven Bruce

Did you find people are still keen to have a local library of records a local database, which is updated with the online whenever whenever it whenever it's able, but gives them that access to all their records. If the internet fails, I know, internet's failing is becoming more and more of a rarity these days, but it's still a worry in people's minds.

James Purdy

I think it's a personal preference most people. Again, this is just from personal experience. So I may, maybe a small sample size of people who have explained this to me, and most people see it as a relief that they no longer need to worry about those physical records those offline copies. Please, because your internet can go down if you've got your whole life stored on one laptop. What if that laptop breaks? What if the hard drives corrupted, it's, it's a balancing act. I think for a lot of people, for those that do wish to store offline copies, it is possible to get your notes out of these online systems. So you could store them on a secure

hard drive or in another location if you choose. But generally speaking, most people, once they get their head around the idea that they no longer write in the notes that no longer having to physically store them. I think it's,

Steven Bruce

it's a relief. If I if a patient comes to see me and that sort of angle about this one, patient comes to see me and my internet mysteriously has dropped out, can I still use the gene app and let it update at a later date.

James Purdy

And this is a tricky one to demonstrate. Because the internet is active, as long as you'd open the record and started typing their notes, you'll see. So we've got this gene logo in our gene blue color, we call it across the top, you'll notice this color changes. And it would say you've lost your internet connection. And it would be attempting to reconnect. As long as you don't close that browser session, everything you type, you would be able to continue to type and as soon as the connection is restored, it would very quickly update in real time with

Steven Bruce

so that we can shut down our internet. Yeah, exactly. Yeah. So earlier on, you were talking about the the sort of features or sort of benefits that someone ought to be looking for from an online system. And you started off with what it wasn't what was one of the main features? What are the latest sort of developments in online CLICK software.

James Purdy

And so lots of people so we're not having to install something physical is a massive thing. Being able to manage it on your mobile device on any device that you choose is a massive thing we've seen like it's really interesting since the kind of the start of the pandemic massive switch and a lot of businesses where they offer a lot of telehealth services now, so a lot of maybe an online consultation might be an initial video consultation rather than in person that's become massive. And we've seen so many clinics fully embrace this totally new way of working. I think at the start of the pandemic, it was a difficult thing to do like an initial osteopathic assessment without physically seeing someone in the system. Yeah, so it's similar to I'm sure everyone's familiar with Zoom and teams and stuff at this point now. So again, not to bang on about James, but we do have a free telehealth system that we've built into the software. And so it would allow you to schedule a one on one video call with a patient, you can share your video then stored? No. So the way that that works, it's the type of connections or peer to peer connection. So all that happens at the start of the call, the patient gets a link that they can click, the practitioner gets a link that they can click and it creates a secure connection between the two. So none of that data stored it completely bypasses all Jane servers, it's not possible for anyone to record that video session and store the file afterwards. So for privacy reasons, we were very careful not to write up afterwards. Yes, yes, absolutely. But that's been an interesting change, I think. Whereas pre pandemic, we had a few clinics, again, from personal experience who offered those online appointments. But that was their business where a lot of people now we're in this mix of virtual and in person appointments.

Steven Bruce

And I guess actually, that's something which is probably worth considering if you're about to buy an online software package, isn't it? Because it is much more a run of the day to day thing to do video consults. Yeah,

James Purdy

a lot of patients are kind of expecting that now as well. I know, I'm not sure about GP surgeries for everyone. But I know my local GP surgery switched to a lot of telephone and video appointments before you can actually get in to see a GP and I think a lot of the kind of allied health care sector seems to be going a similar route.

Steven Bruce

Yeah, I know. I think our practitioners in my day would resist the idea of doing a full appointment. Certainly the osteopaths and sports therapists really probably resist the idea of doing a full appointment through a video session. But we do free consultations as well. We don't offer any treatment. And then some of those could easily be done through a video session, and it will be more convenient for the patient and for us. Yeah, yeah, a couple of questions or observations have come in WSB has asked what the online case history form looks like. Oh, so

James Purdy

this is the fun stuff we can get into. Now, this is awesome. So it looks essentially like however you'd like the online case history form to look. So I'm just going to pull up an example of a fake patient here in our demo site. So this is kind of the front profile screen of the patient. We've got their contact information, date of birth age, we've got a little bit of information about upcoming appointments. We've got some financial and appointment information along the top as well, because I

Steven Bruce

do know it's silly of me but next to the date of birth, it says into months and I always think that's a really nice thing to be reminded of because in the past so often your birthday is in a couple of days time and I just haven't tweaked yet. Even I would possibly notice that if I call Yeah, it's

James Purdy

let's see if we've got a quick example just to hop away. I will come back to this question, but it is some people absolutely love this. I don't think we'll have an example. If it is the patient's birthday on the day of the appointment. The appointment gets wrapped Yep, in a little bow. So there's a little bow like a present on there. I think that's quite nice. But yes, very good point it that's just easily accessible on the front screen of the patient.

Steven Bruce

On the front screen, we've got some profile settings, charts, which Charles's case history is yes. So that's kind of the medical billing and billing, of course, is a useful thing to be doing online rather than having to take stuff at the reception desk.

James Purdy

Yes, absolutely. So I'll click into this chart area now just to show what this looks like. So by default, what we're seeing here is the most recent entry that was written by a practitioner, so the practitioners name over to the side here, we've got their notes, we do condense it a little bit, just to save a little bit of space, but you can click to expand that entry to read. Read the full entry.

Steven Bruce

Right? And so just you're scrolling through that very quickly. Yeah, we've got chief complaint, we've got whatever adjustments were made, exercises that were prescribed. But this is a

case history form, which is specific to this practitioner, yes, isn't it we can, you can have whatever you like,

James Purdy

yes, indeed. So I've got in full Blue Peter mode, we've got this one that we made earlier, everything but the kitchen sink is a nice example that we use, just to show how flexible and how customizable these notes are. Some people are perfectly content with Xboxes, and a couple of Tikki boxes, you could absolutely build something like that for yourself. This example we've got here. So we've got chief complaint, like you mentioned, we have vitals down here, you've got note fields, we can draw on this, I can embarrass myself and draw a smiley face on this or try and draw something a little more professional yet, but you can sketch over the top of here, which is quite nice. This little finger pointer tool that I click as well, that allows you to put these little note boxes with a kind of corresponding mark next to it. So you know, specific to each of those marks that you put on the body there. That image can be replaced with any image that someone chooses as well, which is quite nice. And you can still sketch and annotate over the top. For anyone using paper notes or with letters and things they want to scan in. Like we mentioned, we've got this file, image upload area, so they can scan in previous copies of the patient's notes. And scroll through a couple of things. To check boxes, we've got some clever options down here. So this, this is, if you can spend the time to put something like this together, it's a massive time saver. So options list, as checkboxes in our example is walking, running weightlifting with a few different options. So what that allows us to do see, so you can see, as I tick a few different options, this sentence kind of types itself out as if I've written that as a sentence. When I save this note, all of these tick boxes are hidden from view. And it's just going to show the sentence that we've kind of programmed in. So if you have a question as like this, when you might ask the same kind of questions over and over again, during an initial consultation, maybe it's a way that you can build a tool like this,

Steven Bruce

I'd say this autom automated sentence, I can now edit that to be specific to what they

James Purdy

say, Yes, correct. And you can always add stuff to these notes while they're in draft as well. So you've always got the option down at the button here to add an item. So if there's a section you hadn't thought of, or you just need to add some additional notes, you can just pop down, add a new note box and put some

Steven Bruce

other patient and I haven't needed or haven't done any drawings or anything like that, can I take them out so that they don't take up too much space? Yeah,

James Purdy

totally like this sketch box down here, we might not need this so that the same three little dots, the ellipsis over the side, and we can just delete that section off, it's not going to remove it from the template you've created, but it will remove it from that move that you know specifically, I can show you the template builder as well. So just so I show where you would actually go here. So I'm just I'm signed in as the staff member called Demo owner, and the account owner. And I'm clicking this chart templates option below my name here. And this allows me to build my own templates. From Scratch, we actually do have a template library I can demonstrate as well which see osteopathic we've got over 450 specific templates for osteopathy that have been shared in here, which is quite nice.

Steven Bruce

Right now that you mentioned this last time you were in these are not 465 templates that you Jane have inherited, these have all been shared by other clinic owners. And I could look through those and pick the one that I liked to be Michael.

James Purdy

Yes, absolutely. And I should say for anyone who creates their own templates and doesn't wish to share them they never shared by default. It's something that the practitioner with

Steven Bruce

60,000 Chiropractic templates. Yeah, I suspect that reflects the balance of customers being that largely This is North American system, isn't it?

James Purdy

Yes, it is. So James, very large in Canada now and quite big in the US and still growing in the UK, we'd say. But chiropractic at least initially was Jane's largest discipline by far we've got a few others that are catching up now but yeah, that's

Steven Bruce

there's a lot of overlap between American chiropractors, UK osteopath, UK chiropractors, I think as

James Purdy

well Yes. And that's the nice thing that if there's a keyword you'd like to search for, instead of clicking in here, like a specific type of template, you could pop that keyword in and see if a template may exist in a different discipline. But let's just click in We'll pick the first one that shows up under osteopathy. So someone shared a patient intake they've created. And we can see here that we've got almost 600 people using a version of this template. So you can preview that, scroll through and see all the hard work they've done. And then chosen to share this with you, which is quite nice if you're building your own templates, and you don't know where to start. And then we can add this in to our own account. And then you've got the option from this point to completely customize it, add things, remove things, change the language, whatever you need to do, reorder things. And but sometimes it's nice if you are just staring at a blank screen, and you really have no idea where to start with something the template libraries created. They did something to create it from scratch. Yes, totally.

Steven Bruce

And we have some other questions in here. Matthew has asked whether gene can manage migration of existing records from another provider? And what else does he say? He realizes that his existing provider would probably charge me to release the data. So does Jane consider his records to be their data as some do's and otherwise?

James Purdy

Yes, you own your data. So each Jane account. So as we see here, and the account owner, each Jane account has one account owner and that person is considered the owner have all of the data within the account. So if you were ever to leave Jane, which obviously we don't want, unless it just really doesn't work for you. And you're totally free to request your data at any time, you can export your data at any time free of charge. We don't lock you into lengthy

Steven Bruce

regarding Matthews question about migrating from another provider? How that's gonna be an interesting one for a lot of people, isn't it? My clinic migrated from PBS because they just failed to move with the times. Sorry, PBS, but you know, it's just a fact of life that everything else is now much more 21st century than than what they're offering? How easy is it to do that?

James Purdy

Yeah. So really, it depends on the data that you can get out of your existing software, the vast majority of software that we're aware of, and you're able to get see your entire patient list as an Excel file or a kind of a spreadsheet file, the same with appointments in the diary. So we can bring over eight years of appointment history, plus all future appointments that are booked in. And then if you've been writing clinical notes and your previous software provider, you can get that information out of there, and the process will differ for each company has,

Steven Bruce

have you ever experienced people having problems getting the data out of other providers?

James Purdy

Yes, I wouldn't like to single out providers. Previously, yes, as as Matthew mentioned there, some some providers will charge for that service and quite a lot of money. In some cases, the providers in the past, they've provided the the notes and the data in a format that just isn't really 21st century compatible, in my view.

Steven Bruce

Going on to that I mean, you your team, James spent a lot of time helping us at Mayo Clinic migrate from PBS because the stuff that came out from them was in a strange format, as I recall, and you had to move all the boxes around. So they all went in mapped into the right

James Purdy

angles. Thanks. Thanks to that, as well, we now have a lot more experience dealing with that kind of migration. So our team know what to expect from the data. But generally speaking, most, most companies that we're aware of these days will provide a clinic owner or an account owner with a full usable copy of the data. And as long as it's in a standard format, like Excel files or PDFs for kind of clinical notes, we can migrate all of that open,

Steven Bruce

it's a great, it's a great point that Matthew brings up isn't it and forgetting Jamie covering up a logo on your shirt. If anyone is going to take on the software, they need to look at how much help they're going to get how easy it is to put their paper records or their existing records in teaching. And it's well worth having a long discussion with the provider. And also it's I don't know, I don't know anything much about other providers and Jain because of course, you're using my own clinic, which is probably why you're so keen to come and speak to you today. But many people are keen to help you before you actually paid your money. And they'll promise you all sorts of things. And when you paid your money, you suddenly find that help is limited. I have to say I think we got an enormous amount of help from you guys when we migrated from PBS. Yeah, thank you for that. My pleasure. I don't know how you can do that in advance. But I hope that's satisfied. Matthews curiosity. Johnny local one, there's a there's a thing about the the names on our Quest Pack system. Some of them are Rewinders made

up I think by the computer, with the patient not thinking worrying having their notes on a mobile putting notes on mobile, it says here and

James Purdy

that means as in being able to access the note like the practitioner can sign in on the mobile phone and access the notes potentially. And I can understand the question I suppose that you think of going into a clinic and they've maybe got a computer or a laptop that's physically installed in the clinic versus someone walking around with the phone in their pocket. We do have and again this isn't just specific to Jane most companies will have copies of is the kind of data security and storage policies that can be shared with patients I privacy policies and things like that. But I think a lot of it just comes down to a mobile device feels more. It's, it's more mobile, it's in the name, I suppose people can carry it around with them anywhere, but the data is still protected behind the same kind of username and password, it's still backed up in exactly the same way as if you were accessing the data on a laptop in clinic on your like your plugged in internet connection. It's just a slightly different way to think. Think about that, I think. But we certainly do have some guidance, Jane specific guidance about that data access that can be shared with patients that goes into it in a bit more like this.

Steven Bruce

It's a it's a presentational thing, isn't it? I frankly, I would not like to be seen by a patient using my mobile phone as my main point of data entry in my clinic. I wouldn't think that that looked very professional.

James Purdy

But it's not compulsory, is it? No, no, absolutely not.

Steven Bruce

Lots of people write their notes up after the after the appointment where you could if you have to do on a mobile phone, which I would hate to do as well, you could do it then.

James Purdy

Yeah, that's the way that most people tend to use the mobile phone with Jane, they've got their main device, whether it's an iPad, or laptop, or hardwired, PC or desktop that they have. And the mobile phones often use just to check the diary. Yes, but it's a very valid question. And we do have more information about a gene specific information on our website.

Steven Bruce

Same person, John, Julie, local to this one. So so maybe it's not the same. And how the system works is how would they write down their own drawn abbreviations? I guess they mean that are in a circle for right or,

James Purdy

okay, so a couple of different things I can demonstrate here. So if there are little symbols that you use, we do, we don't have a key for these symbols. Because we found lots of people use these symbols in very different ways. But I'm just going to quickly I realize I'm clicking through this quite quickly here. But you see, every note field that I type into, this extra line of symbols appears including in the circle here, we don't provide a key, as I say, lots of people use these differently. But if it is symbols like this, you'd be free to use these pre existing symbols. If you've got lists, and this is another really cool feature, actually, I'm just going to head to my staff profile, we've got this feature called phrases which didn't exist

the last time it was here, we've got some very professional examples of whiskey cocktails in our treatment notes there, if there are things that you type, over and over again, or phrases that you may use over and over again, or even a full paragraph that you maybe just need to tweak a little, you can actually build a list of shortcuts that then you would take the shortcut into your notes. And this entire phrase would populate,

Steven Bruce

which is clear every time I write bones in your system, it's going to come up with why a skeleton so cool.

James Purdy

It will indeed Yes, let's, let's demonstrate that now was this one that created a belief, so it's forward slash. So slash was gonna say that could be really confused. And then you can select that or you can choose not to use that at all, I think we do have some more official looking ones rather than whiskey cocktails and things like that. But it's just quite a nice feature. If there are things that you do frequently write over and over again, you don't want to have to copy and paste it or type it out every single time, that can save you quite a bit of time.

Steven Bruce

Definitely. And one of the other things that can save a lot of time is being able to read the notes because you can't read my hand even icon. So there's two turn back to some more of these questions. This B again says Can Jane send treatment booster emails ie after one month, three months, a year, etc? And does it work anything like a CRM?

James Purdy

So it's not really a CRM? If you want to do it? Can we explain what that is for the people? Yeah, so that's a good segue, customer relationship manager and type

Steven Bruce

citizen sort of thing. We send automated emails, yes, you do insert names by code rather than having to do so you get 1000 out all individually addressed. Yes, you may have got one or two of those from me, who knows

James Purdy

exactly that. And so if you'd like to manage something like that, in a fully automated way, or as automated as possible, we do integrate with a company called MailChimp, which people may be familiar with, some people may not be familiar. That's the only integration we have. So if you'd like to fully automate that MailChimp would be the way forward. If you want to manage it in JSON and have a little bit more control as to when these emails would be sent. Identify, it's not the best To demonstrate this, but we do have this report that you can use to pull through things that other people booked within a certain date range who haven't yet booked a follow up appointment, you would then be able to, you'll see here, this person is very keen and they've got a very injured they've got 35 upcoming appointments, so not the best example. But you would be able to shedule these emails to go out in the future. So let's say we saw the patient for an initial assessment last month, and haven't booked in for a future appointment yet. We could come in here and tell Jane Okay, we're going to suggest the patient comes back at the end of February. We'd like this email to be sent out maybe a week before the end of February. And we're going to suggest that come to see Amy, our staff member for a 60 minute massage. Yeah You can pop a little personalized message in at the bottom now this message to patient section as well.

Steven Bruce

So this is this is doing it not entirely by hand, but you've physically got to go and pick the PDS would MailChimp be able to do this better

James Purdy

automatically. So if you wanted to just set it and let it run and not think about it and not worry about it, then yes, so what MailChimp will do is I'll just demonstrate the fields that we pull through to MailChimp here. Oops. So if you can see these fields here, this is what's going to be pushed from, from Jane over to MailChimp. last visit date. And last scripition are two important fields. So again, if you've never used MailChimp before, this might not mean a lot to you. But MailChimp is really clever in that you could say this last visit date, if it's been X number of days, weeks months, since this person had a visit with us, we want to send this email campaign to a patient. So MailChimp would allow you to just set that based on a specific date, and then just let it run for everyone who meets that criteria. And of course,

Steven Bruce

for those people who aren't familiar with CRMs like MailChimp, you can customize the text you can have it say Dear sir, dear madam Dear Mr. You can have a default to a dear up hello there if it doesn't know the name, which it will obviously completely so because it's so flexible, what you can send out, except, of course that for everyone who's visit date exceeds that, that different that distance, then it's exactly the same message, which is quite nice, because it's fairly predictable.

James Purdy

Yes, so MailChimp, very, very clever, not affiliated with Jane in any way other than the fact that we do provide this integration. So you can push these these patient details through.

Steven Bruce

So we can I mean, if you're picking on or if you're going to pick an online system, and I imagine the others will have something like this going on. And you are keen to send out those reminders, and it is worth checking that they do something like this. Yeah, we got. We got a lot of questions here. So several people apparently have asked about signing the notes or rather not signing the notes. We're not supposed to retrospectively amend the notes. But how does that work with online?

James Purdy

Yeah, so it's very similar to, I like to think of it as an almost physical stamp that you're putting on a piece of paper. So Jane is very insistent about timestamps. So if I just start a new random note in here, so you'll notice that it's it's still in draft. At the moment, we've got this little unlocked padlock icon on here, chain will never automatically lock your notes after 24 hours or anything like that. It's always up to the practitioner to come back and sign off on their own notes. As soon as I hit this sign button down here, James is going to ask me, Are you ready to sign it? Are you sure? I'll say yes. And that padlock has then locked itself over here. So it now has this?

Steven Bruce

Yep. So I know it's in my own 3142.

James Purdy

If you do need to make an amendment, you'll notice there is an amendment button here. So only the person who actually wrote this note and logged it originally is able to come in and amend a note. And if they add an amendment, they can't remove any of the information that they previously signed and locked. But they can add some new information in here. And we'll have a second time. So that's

Steven Bruce

used to show they have to say I was known Jane in the past when I've actually opened a new chart entry to say I got the last one wrong. I didn't mean left or something like that, yet be able to do that there. Yes, we're in a horrible event that someone has investigated, it means that they put a clear evidence trail. Yes,

James Purdy

absolutely. What

Steven Bruce

if we have let me let me phrase this differently? I am aware of clinics where some practitioners have not signed their notes. Okay. And so the clinic principal has chased them up after you could be days or longer. So you haven't signed these notes. They've got to be signed? Is there a record kept on Jane as to when the note was first drafted? Or is it only dated when they sign it? Oh,

James Purdy

that's a good question. Actually. One two, which I do not know the answer. Let's have a look. I don't know that we do keep a timestamp of when it was originally drafted however,

Steven Bruce

but of course you will know when the appointment was and then yes, and that note will always be attached to the appointment that it reflected winter.

James Purdy

Yes, it will and thinking of that question as a clinic owner or maybe a practice manager whose job it is whose role it is to kind of keep an eye on that one nice thing that we have. Again, this is a new feature since last time it was here we've got this dashboard view for each practitioner and you see we've got this little dashboard view to look back and see if there are any notes that haven't been started so any appointments that exist in this practitioners diary but there's no clinical note that's actually linked to the appointment at all and that are currently in draft and then showing all that have been signed so we can see Mike really is doing all right. He signed all of his notes in that date range and there are ways that you can kind of fill it down to view exactly which appointments don't have notes or which practitioner hasn't signed

Steven Bruce

specific probably not gonna get the chance to to go through much more because quite a few questions already got 10 minutes left in our in our time. Let me just turn to a couple With others could you use gene to manage diary and reminders and accounts but still not use it for notes and stick to paper?

James Purdy

Oh, yeah, totally. Like, there's similar to you said before with the mobile phone, we're not going to force you to use the mobile phone. If you don't want to use Jane for clinical notes.

That's absolutely up to you. If you decide at some point to transition to clinical notes, I'll just demonstrate because I'm not sure I showed it very clearly before, you will always have the option. So there's a Files area for a duration profile, drag and drop, scan them in from your device, you can take a photo and upload it directly to Jane, and then make that transition and have had that, you

Steven Bruce

know, I'm one of those people who way back in the day, so probably 10 years ago, something like that. I was thinking, No, I'm never going to use this. I don't want to be sitting tapping at a computer, well, the patients in the room and so on. And then I realized just how much more convenient it is to have all the notes on an electronic system rather than you know, filing cabinets full of dropping out of paper covers and things like that. And what's more, I can read them when I look back at the ad read other people's names. Yeah, so But okay, let's Trevor says he switched to Jane app some years ago, and it's been and remains brilliant. Now, here's one, you're gonna like this. Okay? When you showed us the integrations a moment ago in MailChimp, and then it had physio track. Yes. Now, as you know, I think most people in this country in osteopathic and Chiropractic Clinics are probably using rehab my patient, yes, perhaps another system, but I don't know about physio track. So does that mean that anyone who is using let's see rehab by patient has now got to switch to a different exercise program?

James Purdy

If you'd like it to work and be fully integrated with Jane, yes, the only option we currently have is fizzy track in the UK in North America, it is the only option that we have. And that we do have. And I'm sure you know, we have clinics who use rehab my patient alongside Jane and just don't integrate the two the two systems. I will say that we were very aware of the desire for an integration with rehab my patient from lots of our UK clinics.

Steven Bruce

So what happens then how does how do the users tell gene they need this particular function in the in the software?

James Purdy

Yeah, so that's a very good question.

Steven Bruce

We had a plan that I saw this before we went on.

James Purdy

It is right. So we have this feature request bits. So anyone who signed into Energen account, they'd see their name in the top right corner, they can click to access this feature request area. What this allows us to do is firstly see features the team are actively working on at the moment and new features we've completed things currently in process in progress gives me and planned planned releases for the future. Rehab, my patient is not on there at the moment. And then this feature request list. If I search for rehab, my patient, you'll see we've got we've had a few people request that integration, what I would say is for anyone who is currently using Jane, who would like the integration, please go on here, add a little vote to this request. Just tap that little up arrow, add a comment and let us know. For anyone who's maybe considering using Jane, who this might be a deal breaker like Nope, we absolutely need that integration. If you are able to get in touch with us just send us an email and say, We need rehab my patient. If they want to get in touch with you, where do they send their

email. So if they want to get in touch with me directly, it's Jamie at Jane dot app. Otherwise, they can send it to support at Jane dot app. And that will come through to our UK support team. But I would say make as much noise as possible about the need for this integration. And it's something that the more noise the more we hear from our customers the simple words needed.

Steven Bruce

What do you gain from it being integrated with Jane? Does that just simply mean that Jane keeps a record of what you've sent in your notes? Yes,

James Purdy

it suppose the main things convenience with a lot of things. So if I can select a random patient here in our demo site, you see we have this extra tab for fishing track along here. Right. So let's say I as a practitioner, maybe I've built some custom exercise programs in my fizzy track app, I wouldn't need to navigate away from Jane to open fizzy track or rehab my patient, create an exercise program and then assign it and then come back to Jane. It's all going to be integrated directly to Jane. And it allows you to sign exercise programs and kind of keep keep track of them directly from it.

Steven Bruce

We've had Tim Allerdycy on the show a few times. Tim is of course the guy behind react by patient and actually I think Tim is actually watching this show probably with an interest himself in whether Jamie integrates with rehab my patient so but I take it from what you said that when we've got I think it was about 17 requests for I believe so yeah. 3000 for something else below it. That's right so you can tell which one is going to be up to three and a half 1000 to text patients from Jane, which you said it can do anyway.

James Purdy

Yes, I'm not sure what the difference is with this is for me to check afterwards. I guess it's a different type of message. It's gonna get the the attention that yes, but definitely please keep asking us any any email that comes in even Another Jane customer mentioned, mentioned that desire for rehab my patient, let's get back

Steven Bruce

to some of these. Yeah. Okay, so this one's been called Sweet Hello, I can't believe anyone gave himself. Sweet. Hello says hello. Does Jane app help us take patient card payments in clinic?

James Purdy

Awesome questions. So we have a direct payment integration, our favorite topic now. And we brand it as Jane payments. So that's what we refer to it as the company we integrate with is called stripe. I'm not sure how familiar people may be with stripe, but there are an enormous payment processor that they work across every sector pretty much everyone these

Steven Bruce

days, we switched Australia. We didn't rehearse this, but we switched a stripe in my clinic from WorldPay. I think it was. And just the differences. It's the difference between PPS and Jamie? No. Okay, everything is so good. So yes.

James Purdy

And so we we integrate with them, we brand it as Jane payments, what it allows you to do, which is just really, really nice is if you offer online booking as a clinic, you'll have the option to set these different payment policies for online bookings. So our default in our demo site is just no payment requirements. But you would have the option to say you'd like to request a deposit to secure a booking. So anyone booking online must pay a deposit amount that you set, or you can have a different rule for maybe existing patients don't need to pay. But a brand new patient who's never you've never seen before, you may want to require require a small deposit to secure those bookings, for example. So it allows you to capture those payments up front, you can also send payment links after appointments the patient as well, and they have an online portal through which they can pay any outstanding balance on their account, I'll

Steven Bruce

tell you what I one of the things that I put maybe a personal glitch in my system. But I have never liked taking money from patients in clinic, I always think it breaks down that barrier that the relationship between the practitioner and the patient. And I mentioned this to somebody the other night when we were talking about treatment plans and so on. And he said it was possibly my own phobia rather than anybody else's. But I do think the fact that you know, the payment card can be saved in the in the software, and you can just say to the patient is okay, if I just take patient payment from your existing card that to me is a much friendlier transaction and get your wallet out and hand over the sticky five pound linked. And I love it. And I'm sure you know, Jane isn't the only Yes, it does automatic payments. Everybody else, everybody else will do that as well. But it's a huge attraction to me and using an online system rather than the physical one. And of course, it takes the weight off receptionist having to do all that as well. Yeah. And you can do all these booking the next appointment at the touch of a button. And yeah,

James Purdy

absolutely. And I think that's another one of those things that during the pandemic contact free has become huge, and a lot of people have become way more comfortable with that idea of just Yep, just charge the card.

Steven Bruce

So let's see if we got time for a few more Rhino does the soft Rhino might be his name? Does the software allow you to do a clinical audit? Now there is a great question in presenting a pie chart the type of patients you're seeing the conditions being treated and the treatment being undertaken. It's a great question because osteopaths particularly are required to do this sort of thing. And so, Kenny,

James Purdy

so, yes, kind of at the moment, depending on what it is you would like to audit, so that the way that Jane works at the moment, and I wish I could demonstrate these new features, but they require live data. And this is a demo site, the way that Jane works at the moment, with a lot of reports, for example, you would say we want to view the different types of appointments we've had booked in over the past few months, you would come in, you would set a few different parameters along the top and Jane's gonna say cool, this is everything you've asked for in a great big list, a new set of features, and really wish I could demonstrate we call it analytics. And we've got a whole new bunch of reports that allow you to report on very specific things. So like clinic, it's gonna be so much better if I could show what this looks like, rather than just describe it.

Steven Bruce

And you could you send us a demo video, and I can

James Purdy

Yes, absolutely. I will do I'll include I think we've got a PDF that shows the different reports and what I can just share it. Yes, that that'd be awesome. I'll send that over afterwards, because it's very, very powerful stuff. And it allows you to dig down into different types of appointments over time. And you can view lots of different stats on kind of clinical performance and practitioner performance.

Steven Bruce

Brilliant, and we are a mere less than a minute away from our closing time. Okay, what are your What are your final takeaway points on online systems

James Purdy

where I'd say if it's something that you're really unsure about, and there's zero obligation to sign up with Jane at all, this demo site that I'm using, we're more than happy to send out this username and password for people so they can test a system out doesn't need to be Jane that you sign up for. But just try it and play around with some fake patients fake treatment notes and just get a feel for how that works. And that might be a way to kind of bridge that gap and decide if it's something you'd be you'd be comfortable with.

Steven Bruce

Presumably it's worth looking at some other systems as well. And

James Purdy

I'd say so yeah, it's always a good idea

Steven Bruce

to feedback from from others. And with my clinic, we're always very happy to tell people what we think of Jane but then of course our experiences certainly Jane and PPS and there's a comparison between those. Jamie thanks. Brilliant. So it's always a treat talking You're such an enthusiastic thank you yeah and if you be something that PDF I'll get I will do certainly