# Aptcare-R Overview

## Presented by
## Aptsource Software
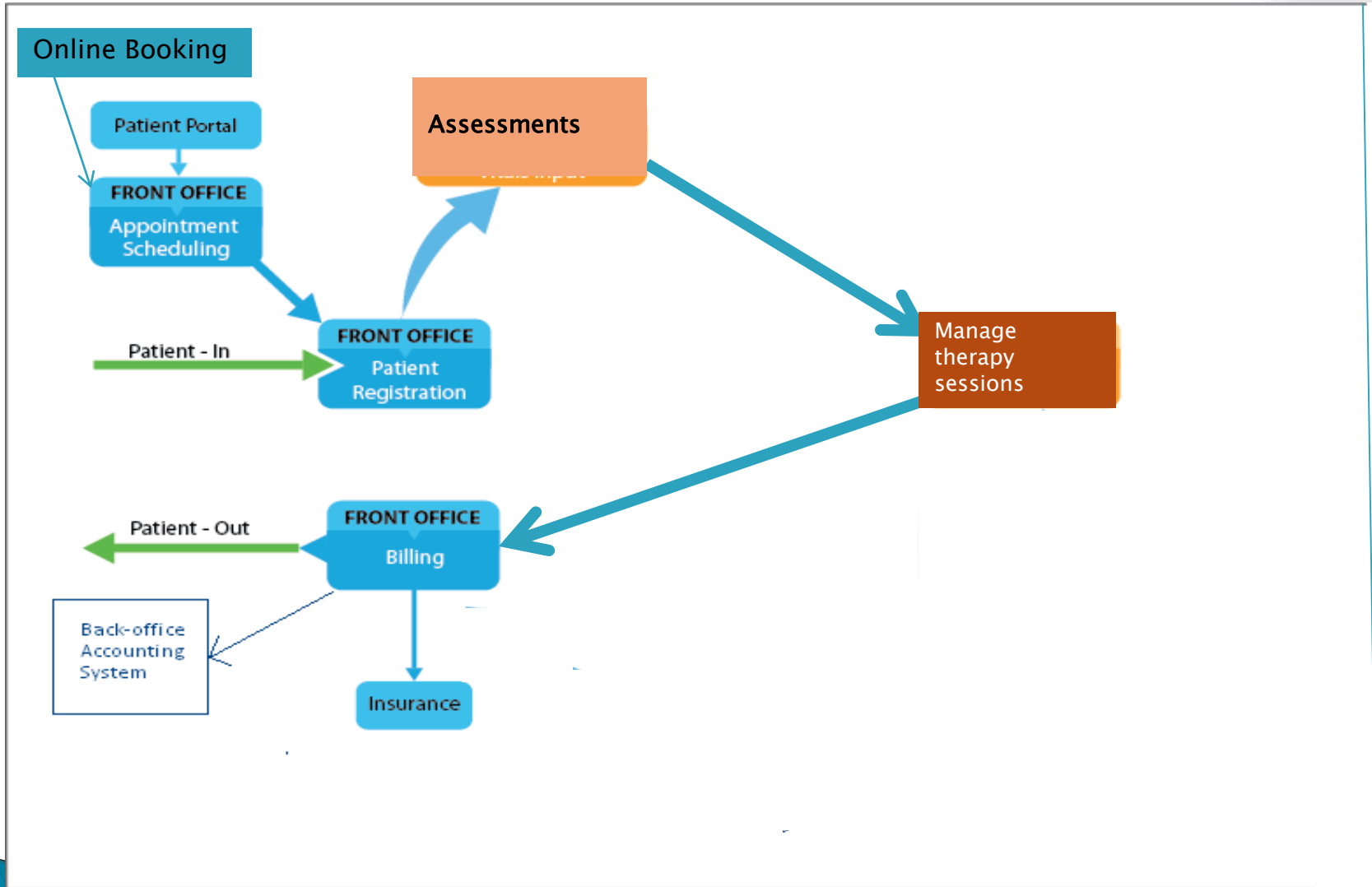
Mar 2015

Aptsource
*Powered By Knowledge*

URL:www.aptsourcesoftware.com

Online Booking

Patient Portal

**Assessments**

FRONT OFFICE
Appointment Scheduling

Patient - In

FRONT OFFICE
Patient Registration

Manage therapy sessions

Patient - Out

FRONT OFFICE
Billing

Back-office Accounting System

Insurance

# Aptcare-R for smoking , drugs & alcohol cessation management

The product is developed specially for smoking , alcohol and drugs cessation management clinic

The Aptcare-R version includes :
- Client Booking & Appointment Scheduling
- Assessments ( Smoking , alcohol , drugs and weight management)
- Billing & Invoicing
- Patient Record Creation and Charting
- Online payment integration
- Integration with CRM tools
- Extensive Analytics and Reporting
- Management of corporate tie-ups
- Supports time bound promotional pricing
- User customisable alerts and reminders (Email, SMS)
- Extensive system configuration
- Client portal and communication with online payment facility
- Support for multiple locations
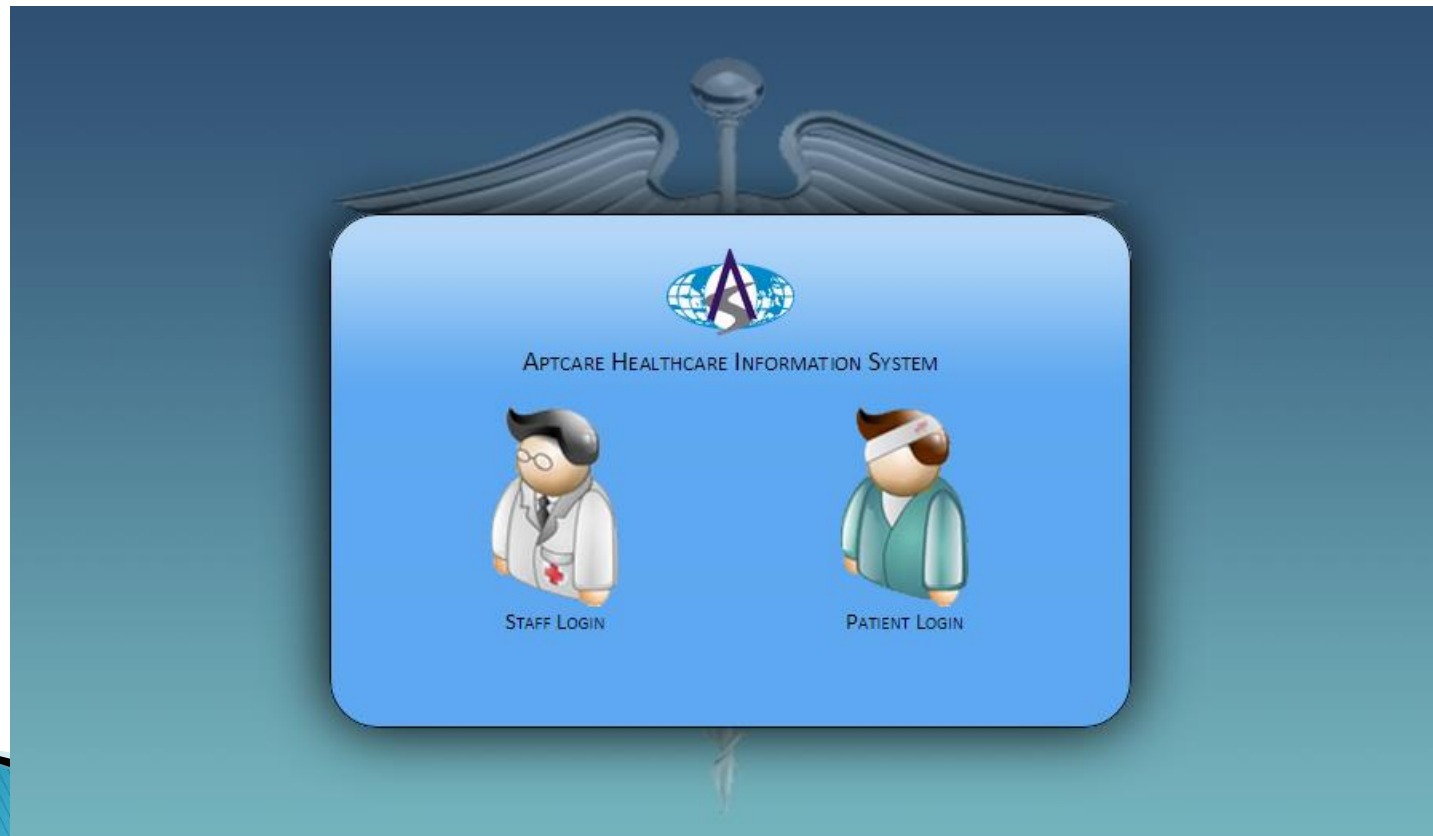- Mobile site support for client portal

# SCREENSHOTS – KEY FUNCTIONALITIES

# Aptcare–R : landing page

The screenshot below shows the landing page of Aptcare-R, which allows two types of login to access the sub-systems. The application capabilities and functionalities differ based on the type of login.

- Staff login
- Client Login

# Registration module

Allows to manage clients and associated details like demographics, contact details etc,

**Client Registration**

## CLIENT DEMOGRAPHICS

| | | |
|---|---|---|
| * First Name : | Middle Name : | * Last Name : |
| Gender : Male | Client Type : Select | Referred by : |
| DOB : | Company Name : | Auth. No. : |
| Home Phone : | Mobile : | Other corp ID : |
| Occupation : | | |

## CONTACT DETAILS

| | | |
|---|---|---|
| Area Code : | * Street : | |
| Line2 : | | |
| Country : Select | State / Province : Select | City : Select |
| * Email : | | |
| Template : Select | | |
| Pref. Program : Select | Pref. Level : Select | |

B  I  U  ABC  Styles  Paragraph  Font Family  Font Size

Allows to view and edit details of existing clients e.g. view visits and appointments, update demographics, update portal account settings, allow client correspondence and chat, and book seats.

REQUESTS     SCHEDULING     REGISTRATION +     PROGRAMS +     SYSTEM CONFIGURATION +     REPORT +

## Search Client

First Name : `mar`     Last Name :          MRN :          Submit     Add

☐ Show Prospects

| MRN | Client Name | Area Code | Cell Phone | Actions |
|-----|-------------|-----------|------------|---------|
|     | Amar Joshef |           |            | 👤 ⚙ ✉ 💬 🕐 ✚ |
| 454 | Marc Pell | SW20 8NH | 07855 855999 | 👤 📄 ⚙ ✉ 💬 🕐 ✚ |
| 447 | Margaret Igeluy | RH164RE | | 👤 📄 ⚙ ✉ 💬 🕐 ✚ |
| 529 | Margot Crowther | RH164RE | | 👤 📄 ⚙ ✉ 💬 🕐 ✚ |
|     | mary brown | RH16 4RE | | 👤 ⚙ ✉ 💬 ✚ |
| 547 | mary brown | RH16 4RE | | 👤 📄 ⚙ ✉ 💬 🕐 ✚ |
| 550 | mary miller | TW15 2DF | | 👤 📄 ⚙ ✉ 💬 🕐 ✚ |
| 598 | Mary Dyson | RH16 4RE | | 👤 📄 ⚙ ✉ 💬 🕐 ✚ |

Records Found : 8

## Programs module

Every program is associated with a session type and level ( e.g. First, Second, Booster levels), and one or more locations.

Programs module consists of :

a. **Manage Session Types** : Allows to view, edit, add or remove various session types ( e.g. sugar, smoke, alcohol, etc)

b. **Manage Programs** : Allows to view, add or edit details related to existing programs or add new programs.  E.g. details like program level, charges, location etc can be viewed, edited or added for each program.

c. **Create/Remove Schedule** : Allows create/remove program instances

## Program Details

| Program Name | Charge | Actions |
|---|---|---|
| Alcohol Booster | 100.0 | ✔ ✘ |
| Smoking First Sumit | 0.0 | ✔ ✘ |
| Alcohol First Tuhin | 250.0 | ✔ |
| Smoking First | 250.0 | ✔ |
| Alcohol First Latest | 60.0 | ✔ |
| Smoking Booster Sumit | 120.0 | ✔ ✘ |
| Smoking First Gupta | 220.0 | ✔ ✘ |
| Weight First | 410.0 | ✔ |
| Alcohol 1 | 260.0 | ✔ |
| Smoking 1 | 8000.0 | ✔ |
| Alcohol Second | 260.0 | ✔ ✘ |
| Drug First Allencarr | 200.0 | ✔ |
| Alcohol First | 130.0 | ✔ |
| Weight First Test1 | 650.0 | ✔ |
| Speech First Test | 500.0 | ✔ |
| | 500.0 | ✔ |

ams.action#

**Program Details**

* Program Category : Smoking

* Level : First

* Program Name : Smoking First

Tag Assessment : Smoking

* Charge : 250.0

* Tag Location(s) :

- ☐ Ashford
- ☑ Aylesbury
- ☑ Birmingham
- ☑ Brighton
- ☑ Bristol
- ☐ Cambridge
- ☐ Durham
- ☐ Kent
- ☑ London
- ☐ ODCenter

Submit    Reset

REQUESTS    SCHEDULING    REGISTRATION +    PROGRAMS +    SYSTEM CONFIGURATION +    REPORT +

| Session | Actions |
|---|---|
| Sugar | ✔ 🔴 |
| Smoking1 | ✔ 🔴 |
| Speech | ✔ 🔴 |
| Smoking | ✔ 🔴 |
| Alcohol | ✔ 🔴 |
| Weight | ✔ 🔴 |
| Drug | ✔ 🔴 |

## Session Type Details

* Session Type Name : Sugar

Submit    Reset

**CREATE PROGRAM SCHEDULE**

| Program Name | Program Category | Actions |
|---|---|---|
| Alcohol 1 | Alcohol | ✔ |
| Alcohol 2 | Alcohol | ✔ |
| Alcohol 3 | Alcohol | ✔ |
| Alcohol Booster | Alcohol | ✔ |
| Alcohol First | Alcohol | ✔ |
| Alcohol First Allencarr | Alcohol | ✔ |
| Alcohol First Latest | Alcohol | ✔ |
| Alcohol First Tuhin | Alcohol | ✔ |
| Alcohol Second | Alcohol | ✔ |
| Alcohol Third | Alcohol | ✔ |
| Drug Booster | Drug | ✔ |
| Drug First | Drug | ✔ |
| Drug First Allencarr | Drug | ✔ |
| Drug First Debalina | Drug | ✔ |
| Drug First Gupta | Drug | ✔ |
| Drug First Latest | Drug | ✔ |

* Program Name : Alcohol 3
* Program Category : Service
* Location : Select
* Rooms : Select
Reserved This Room : ☐
* Start Date :
* Start Time (24 hr) : 00 : 00
* Stop Time (24 hr) : 00 : 00
* Stop Date :
* Seats :
* Therapist : Select
Notes :

Unresponded Messages : 0

REQUESTS   SCHEDULING   REGISTRATION +   PROGRAMS +   SYSTEM CONFIGURATION +   REPORT +

| Program Name | Program Category | Actions |
|---|---|---|
| Alcohol 1 | Alcohol | ✔ |
| Alcohol 2 | Alcohol | ✔ |
| Alcohol 3 | Alcohol | ✔ |
| Alcohol Booster | Alcohol | |
| Alcohol First | Alcohol | ✔ |
| Alcohol First Allencarr | Alcohol | ✔ |
| Alcohol First Latest | Alcohol | ✔ |

**REMOVE PROGRAM SCHEDULE**

| Start Date/Time | Stop Date/Time | Seats | Actions |
|---|---|---|---|
| 25/12/2014 13:00 | 25/12/2014 18:00 | 12 | 🔴 ✏ |
| 02/12/2014 19:00 | 02/12/2014 21:00 | 10 | 🔴 ✏ |
| 01/11/2014 08:00 | 01/11/2014 14:00 | 3 | ✗ 🔴 ✏ |
| 31/10/2014 20:00 | 31/10/2014 23:00 | 3 | 🔴 ✏ |
| 30/10/2014 10:00 | 30/10/2014 15:00 | 10 | 🔴 ✏ |
| 26/10/2014 11:00 | 26/10/2014 13:00 | 3 | 🔴 ✏ |

# Scheduling module

This module allows to book clients for various program instances across dates and locations, and for each schedule, one can view the therapist details and participants list. For each schedule session, it displays the no. of seats available, booked or on hold, as well as no. of parking slots available.

# Requests module

This module displays the booking requests submitted by client from their portal account. The request can be either accepted and booked, or can be cancelled

**Appointment Request**



Unresponded Messages : 0

REQUESTS    SCHEDULING    REGISTRATION +    PROGRAMS +    SYSTEM CONFIGURATION +    REPORT +

## Booking Requests

| Date | Client Name | Program | Slot | Location | Comments | Actions |
|------|-------------|---------|------|----------|----------|---------|
| 01/02/2015 | Ricky Williams | Smoking 3 | 09:00 | London | Please get me one seat | ✔ ✗ |

# System Configuration module

This module allows the system configuration support for users, roles, templates, discount code, charge items, mode of correspondence, corporate tie-ups and associated discount schemes.  It allows to create email or SMS templates for alerts and reminders for various situations.

## Facility Details

| Facility Name | No. of Seats | Actions |
|---|---|---|
| Birmingham | 8 | ✔ |
| Brighton | 7 | ✔ |
| London | 5 | ✔ |
| Bristol | 9 | ✔ |
| Cambridge | 10 | ✔ |
| Durham | 6 | ✔ |
| Kent | 10 | ✔ |
| ODCenter | 9 | ✔ |
| Ashford | 5 | ✔ |
| Aylesbury | 9 | ✔ |

### Facility Details

* Facility Name : Brighton
* Area Code : CA101AA
* Street : Brighton address line1
Line2 : Brighton address line2
* State /Province : Brighton and Hove
* City : Brighton
Parking : 7
Parking Unit Price : 12.0

### Room Details

* Room Name : B101   * Seats : 3
* Room Name : B102   * Seats : 4

* Situation : Appointment Schedul
* Template Type : Email
* Session Type : Smoking
* Location : London
* Template Name : Scheduled
* Send To : Client
* Subject : Your appointment has bee
☐ Deactivate this template
Variables : Select ✔

B I U ABC ≡ ≡ ≡ ≡ | Styles | Paragraph | Verdana | 3 (12pt)

* Comments :

Dear FIRSTNAME,

username: USERNAME
password: PASSWORD

We are pleased to say that your Allen Carr's Easyway Session is nearly here and so we have sent this reminder together with a few things for you to be aware of.

**The session details are:**

Path: p » span

* Set Frequency : ☑ Real Time   ☑ 1 Day Prior   ☑ 1 Week Prior

# Manage Charge Items

parking 🔍

| Item Name | Base Price | Actions |
|---|---|---|
| Parking | 10.0 | ✔ ✗ |
| Parking-Birmingham | 15.0 | ✔ ✗ |
| Parking-Brighton | 12.0 | ✔ ✗ |
| Parking-Bristol | 11.0 | ✔ ✗ |
| Parking-Cambridge | 13.0 | ✔ ✗ |
| Parking-Durham | 8.0 | ✔ ✗ |
| Parking-Kent | 16.0 | ✔ ✗ |
| Parking-London | 15.0 | ✔ ✗ |
| Parking-ODCenter | | |

## ITEM DETAILS

* Item Name :  Parking-Bristol

* Base Price :  11.0

Submit    Reset

Unresponded Messages : 0

# Manage Discount Categories

p 🔍

| Category Name | Discount | Actions |
|---|---|---|
| 10 Percent off | 10.0 | ✔ ✗ |
| 10 Pounds off | 10.0 | ✔ ✗ |
| 210 Pounds off | 210.0 | ✔ ✗ |
| 40 Pounds off | 40.0 | ✔ ✗ |
| Pruhealth | 111.0 | ✔ ✗ |

## CATEGORY DETAILS

Category :  Institutional ▼

* Category Name :  Pruhealth

* Discount Type :  By Amount ▼

* Discount Value :  111.0

* Client's Contribution (%) :  100.0

Submit    Reset

# Reports module

## Day of Session Reception Report

| Choose Level : | All ▼ | Choose Program : | All ▼ | Choose Location : | All ▼ |
| Choose Date : | 16/01/2015 | Choose Slot : | All ▼ | Show | |

Program Level : First | Program Name : Drug First Latest | Location : London | Session Date : Fri 16/01/2015 21:00| No Of Attendies : 1
Note :

| MRN | Client Name | Phone No. | Discount code | Amount Due | Group Booking | Note | Assesment |
|-----|-------------|-----------|---------------|------------|---------------|------|-----------|
| 618 | Robin Brown | 07123 111111 | | 0.00 | Individual booking | | |
| | | | Sub Total | 0.00 | | | |

Program Level : First | Program Name : Smoking First Gupta | Location : London | Session Date : Fri 16/01/2015 10:00| No Of Attendies : 1
Note :

| MRN | Client Name | Phone No. | Discount code | Amount Due | Group Booking | Note | Assesment |
|-----|-------------|-----------|---------------|------------|---------------|------|-----------|
| | Glen Aron Maxy | 07123 555555 | | 0.00 | Individual booking | | |
| | | | Sub Total | 0.00 | | | |

Records Found : 2

This module provides different reports like sessions by therapists, list of sessions, weekly sales report, quarterly report, corporate report, invoice report, parking report, refund report, chronology report and others.

## Chronological Events

| Enter MRN : | 610 | From : | | To : | | ☑ All Events | Show |

MRN : 610 | Client Name : Brew, amy | Mobile No. : | Email : a@a.a

| Date | Event | Details | Event By |
|------|-------|---------|----------|
| Tue 27/01/2015 | Booked Appointment | Session name : Drug First, Location : Aylesbury, Session Date : Tue 27/01/2015 10:00, Therapist : Neil Johnson | Allencarr ACSuper |
| Tue 27/01/2015 | Cancellation | Session name : Drug First, Location : Aylesbury, Session Date : Tue 27/01/2015 10:00, Therapist : Neil Johnson, Appointment Status : Cancelled | Allencarr ACSuper |
| Fri 23/01/2015 | Rescheduled Appointment | From (Session name : Drug First, Location : Aylesbury, Session Date : Tue 27/01/2015 10:00, Therapist : Neil Johnson) To (Session name : Drug First, Location : Aylesbury, Session Date : Tue 27/01/2015 10:00, Therapist : Neil Johnson) | Allencarr ACSuper |
| Tue 27/01/2015 | Booked Appointment | Session name : Drug First, Location : Aylesbury, Session Date : Tue 27/01/2015 10:00, Therapist : Neil Johnson | Allencarr ACSuper |
| Tue 27/01/2015 | Booked Appointment | Session name : Drug First, Location : Aylesbury, Session Date : Tue 27/01/2015 10:00, Therapist : Neil Johnson | Allencarr ACSuper |

# Aptcare-R : Client Portal

- ✓ Demographics
- ✓ Appointments
- ✓ Assessments
- ✓ Communication
- ✓ Billing

Occupation :

**Questionnaire**

* Do you know anyone who stopped smoking with the Allen Carr Easyway Method?

○ Yes  ○ No

* How did you hear about Allen Carr Easyway Clinic Sessions? (Tick which apply)

☐ Recommended by friend or family

☐ Recommended by doctor / dentist

☐ Recommended by Health Insurance Company

☐ Newspaper or magazine article

☐ Allen Carr Easyway book

☐ Social Media /Internet Search

☐ Via my employer

☐ Attended before

☐ Voucher Promotion

☐ Other (please specify)

**Appointment Request**

* On average, how many cigarettes (or equivalent) so you smoke per day?

Select

* Your favourite brand?

Select

How did your very first cigarette taste?

* Select Category : Smoking

* Select Program : Smoking First

* Select Location : London

* Select Date : 01/09/2015

* Select Slot : 09:00

* To : 17:00

Available Seats : 0

* Enter Comments :

Post Request    Go Back

# Prepaid Online Booking Portal

| Home | About Us | Stop Smoking Clinics | Endorsements | Corporate Services | Alcohol | Weight | Other Drugs |
|------|----------|----------------------|--------------|--------------------|---------|--------|-------------|

**Find your nearest UK Clinic**  All ▼   **Choose Session Type**  Smoking ▼

**Select Session** | **Attendee Details** | **Make Payment**

Step 4 - If applicable, please apply an ID/Voucher number to this transaction and pre PAY NOW

[Back]

Booking Summary

| Session Date | Session Name | Unit Price | Seat(s) | Parking(s) | Total Price |
|--------------|--------------|------------|---------|------------|-------------|
| 12-MAR-2015 | Smoking 1 | 260.0 | 1 | 0 | 260.0 |
| | | Total Price for the selected sessions | | | 260.0 |
| | | Apply a voucher / ID number to this transaction | | | |
| | | Total Payable Price | | | 260.0 |

[Pay Now]

### YOUR CART 🛒

| Item | Amount |
|------|--------|
| Smoking 1 (London) | 260.00 |
| Parking | 0.00 |
| Session Total | 260.00 |
| Parking Total | 0.00 |
| Gross Total | 260.00 |
| Net Total | 260.00 |