



Clinic Software The Latest Jane App - Ref211

with James Purdy

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TRANSCRIPT

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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 CPD 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 Purdy. Jamie, hi, good to have you with us, great, we can shake hands again. I think it really is not legal these days. So, Jamie was on the show, just over two years ago, in fact, when he came and talked to us about the Jane 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, whether 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 those things? So, over two years, Jamie, has Jane 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 here, in fact, I think we've rolled out a lot of features that are kind of specific to COVID in the new world in which we find ourselves. So one thing, especially at the start of the pandemic was COVID screening questionnaires that suddenly every company in the world was asking people to complete, 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.

Steven Bruce

Okay, so you've got that on the screen now.

James Purdy

Yes, indeed.

Steven Bruce

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

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 a 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 americanised like, do you have a fever rather than a temperature. But it's just a nice tool that you can kind of customise. And just make sure that you're asking those questions.

Steven Bruce

Right, so, if I 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

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 their 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

If 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 customise 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 customisable, as well. So you can click to edit the templates, rename the questions, relabel the questions, add additional options, it's really nice. And once you put in the 5, 10 minutes to set this up, it's a huge time saver to avoid those phone calls, those manual emails and checking.

Steven Bruce

You said earlier on that some clinic owners are sitting down on an evening manually texting all their patients. And then you switched cunningly to emails, can Jane 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 to show you our text message, a preview of this just to show the kind of thing that we can send out. So it's going to be short and sweet, your appointment's 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.

Steven Bruce

I imagine that the bigger providers, I'm trying to make sure that this isn't a sales plug.

James Purdy

Yes, absolutely.

Steven Bruce

People might not want to use Jane or 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 to patients.

Steven Bruce

I don't imagine the patients desperately want LinkedIn messages, do they?

James Purdy

Some people I know do, 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 so on?

James Purdy

Being able to do 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 10, 15, 20 years plus. So I think when people realise 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 a laptop like I am now just through your web browser. It's absolutely huge. And the amount of time, I'd say is the big thing.

Steven Bruce

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 then you're running two systems.

James Purdy

Yeah.

Steven Bruce

And somewhere, you still got all those paper records in case so and so comes back after 6, 7, 8 months or two years or something, and you've got to go and pick up those.

James Purdy

No, 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 realise it's just not sustainable anymore. Like maybe they're running out of filing cabinet space in their spare bedroom, and they realise 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's stored in UK Data Centers, so for all of our UK, and European accounts, everything's 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 did ask you last time what happens when your power supply or your internet goes down at your own clinic?

James Purdy

Yeah, that's one of those things...

James Purdy

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 or into 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 Jane's web based, there's nothing to download and install. So if your hard wired internet connection goes down, hopefully you've got your phone.

Steven Bruce

But pen and paper still work.

Steven Bruce

Do you find people are still keen to have a local library of records, a local database, which is updated with the online 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 for 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. 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 drive's corrupted, 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, the no longer having to physically store them. I think it's a relief.

Steven Bruce

If a patient comes to see me, and sorry to bang on about this one, if the patient comes to see me and my internet mysteriously has dropped out, can I still use the Jane app and let it update at a later date?

James Purdy

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 Jane logo in our Jane blue color, we call it across the top, you'll notice this colour 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 the server.

Steven Bruce

I'm sorry we can't shut down our internet.

James Purdy

Yeah, exactly.

Steven Bruce

Yeah. And earlier on, you were talking about the sort of features or sort of benefits that someone ought to be looking for from an online system. And you started off with, I don't remember what it now, but it was one of the Jane features? What are the latest sort of developments in online clinic software?

James Purdy

So lots of people, so 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 a, like it's really interesting since the kind of the start of the pandemic a 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, seeing how they move.

Steven Bruce

How does it work through an online system then?

James Purdy

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 Jane, 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 screen.

Steven Bruce

And is that video then stored?

James Purdy

No. So the way that that works, it's the type of connection's a 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's 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.

Steven Bruce

And you still have to write write the notes up afterwards.

James Purdy

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 day to day thing to do video consults.

James Purdy

Yeah, 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 clinic would resist the idea of doing a full appointment. Certainly, the osteopaths and sports therapists would 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, a couple of questions or observations have come in Visipy has asked what the online case history form looks like.

James Purdy

Oh, so 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.

Steven Bruce

I don't know if it's silly of me but next to the date of birth, it says in two 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 twigged. Even I would possibly notice that.

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 up 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, that's just easily accessible on the front screen of the patient.

Steven Bruce

On the front screen, we've got profile settings, charts, which charts is case history, isn't it?

James Purdy

Yes. So that's kind of the medical notes.

Steven Bruce

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 practitioner's 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. 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 or his practice, isn't it?

James Purdy

Yes.

Steven Bruce

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 customisable these notes are. Some people are perfectly content with text boxes, and a couple of ticky 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.

Steven Bruce

We can draw on this, can we?

James Purdy

I can embarrass myself and draw a smiley face on this or try and draw something a little more professional here, 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 can write notes 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. I'll scroll through a couple of things. To check boxes, we've got some clever options down here. So this, if you can spend the time to put something like this together, it's a massive time saver. So options list, as checkboxes and our example is walking, running, weightlifting with a few different options. So what that allows us to do, let's 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, where 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

And I take this is an automated sentence, I can now edit that to be specific to what they say.

James Purdy

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

And if I then have a 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?

James Purdy

Yeah, totally like this sketch box down here, we might not need this so, the same three little dots, the ellipsis over to 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 note specifically. I can show you the template builder as well. So I show where you would actually go here. So 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 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 my template.

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 or the clinic chooses.

Steven Bruce

There's 6000 Chiropractic templates. I suspect that reflects the balance of customers being that largely this is a North American system, isn't it?

James Purdy

Yes, it is. So Jane's 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 definitely the biggest.

Steven Bruce

But also, there's a lot of overlap between American chiropractors, UK osteopaths, UK chiropractors, I think.

James Purdy

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 and 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 customise it, add things, remove things, change the language, whatever you need to do, reorder things. 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 create it.

Steven Bruce

Absolutely. So much easier to edit something than to create it from scratch.

James Purdy

Yes, totally.

Steven Bruce

And we have some other questions in here. Matthew has asked whether Jane can manage migration of existing records from another provider? And what else does he say? He realises 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 and otherwise?

James Purdy

Yes, you own your data. So each Jane account. So as we see here, I'm 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. 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. That's going to be an interesting one for a lot of people, isn't it? My clinic migrated from PPS because they just failed to move with the times. Sorry, PPS, but you know, it's just a fact of life that everything else is now much more 21st century 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 you're able to get, say 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 in your previous software, providing you can get that information out of there, and the process will differ for each company.

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 other providers. Previously, yes, as Matthew mentioned 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 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, your team, Jane spent a lot of time helping us at my clinic migrate from PPS 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 that they all mapped into the right angles.

James Purdy

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 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 over.

Steven Bruce

It's a great point that Matthew brings up, isn't it, and forgetting Jane, covering up the logo on your shirt. If anyone is going to take on clinic 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 online records into Jane. And it's well worth having a long discussion with the provider. And also it's, I don't know anything much about other providers than Jane, because of course, we're using it in my own clinic, which is probably why you're so keen to come and be interviewed 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 PPS. Yeah, so thank you for that.

James Purdy

My pleasure.

Steven Bruce

I don't know how you can do that in advance. But I hope that's satisfied Matthew's curiosity. Johnny Local One, there's a thing about the names on our question system. Some of them are real and some are made up I think by the computer. Would the patient not think it worrying having their notes on a mobile, putting notes on mobile, it says.

James Purdy

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 their phone in their pocket. We do have, and again this isn't just specific to Jane, most companies will have copies of the kind of data security and storage policies that can be shared with patients, like privacy policies and things like that. But I think a lot of it just comes down to, a mobile device feels more, 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 plugged in internet connection. It's just a slightly different way to 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.

Steven Bruce

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. But it's not compulsory, is it?

James Purdy

No, no, absolutely not.

Steven Bruce

Lots of people write their notes up 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, a laptop, a hardwired PC or desktop that they have. And the mobile phones often used just to check the diary.

Steven Bruce

Which is what it's perfect for, isn't it.

James Purdy

Yes, but it's a very valid question. And we do have more information about Jane specific information on our website.

Steven Bruce

Same person, Johnny Local two this one. So maybe it's not the same person. I don't know how the system works at the moment; how would they write down their own drawn abbreviations? I guess they mean that are in a circle for right.

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 realise 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 preexisting 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 I 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 type the shortcut into your notes. And this entire phrase would populate, which is quite nice.

Steven Bruce

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

James Purdy

It will indeed, yes, let's, let's demonstrate that now. It was this one I created I believe, so it's forward slash.

Steven Bruce

Forward slash, I was going to say that could be really confusing.

James Purdy

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 handwriting, even I can't read my handwriting. Let's turn back to some more of these questions. Visipy again says, can Jane send treatment booster emails i.e. 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.

Steven Bruce

We ought to explain what that is for the people.

James Purdy

Yeah, so that's a customer relationship manager and type system.

Steven Bruce

This is the sort of thing which sends automated emails and insert names by code rather than having to do so you get 1000 out all individually addressed. 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 Jane and have a little bit more control as to when these emails would be sent. Or demo site's not the best to demonstrate this, but we do have this report that you can use to pull through, these are all the 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 are very injured, got 35 upcoming appointments, so not the best example. But you would be able to schedule these emails to go out in the future. So let's say we saw the patient for an initial assessment last month, they 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 they come to see Amy, our staff member for a 60-minute massage. You can pop a little personalised message in at the bottom in 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 patient and 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 Jane over to MailChimp, last visit date and last scription 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.

Steven Bruce

And of course, for those people who aren't familiar with CRMs like MailChimp, you can customise the text, you can have it say dear sir, dear madam, dear Mr. You can have a default to a dear, hello there if it doesn't know the name, which it will obviously in clinics, but it's so flexible with what you can send out, except, of course that for everyone who's visit date exceeds that, that distance, then it's exactly the same message, which is actually 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 patient details through.

Steven Bruce

So again, I mean, 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, it is worth checking that they do something like this. 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 still in draft at the moment, we've got this little unlocked padlock icon on here, Jane 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, Jane's 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

Signed by x on 30th of January at 1:42.

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 timestamp.

Steven Bruce

Oh, that's useful, because I have to say I've done that on 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 an invite or something like that, yet be able to do that there. In a horrible event that someone has investigated, it means that they put a clear evidence trail to what happened.

James Purdy

Yes, absolutely.

Steven Bruce

What if we have, 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, it could be days or longer saying 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?

James Purdy

Oh, that's a good question. Actually. One to, 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 therefore, and that note will always be attached to the appointment that it reflected.

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 I 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's 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 specific notes.

Steven Bruce

We're probably not going to get the chance to go through much more because quite a few questions already, we only got 10 minutes left in our in our time. Let me just turn to a couple of others. Could you use Jane 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 each patient's profile, drag and drop, scan them in from your device, even take a photo and upload it directly to Jane, and then make that transition and have that on there.

Steven Bruce

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, while the patient's in the room and so on. And then I realised 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, I can read other people's notes. But okay, Trevor says he switched to Jane app some years ago, and it's been and remains brilliant. Now, here's one, you're going to like this question. When you showed us the integrations a moment ago in MailChimp, and then it had physio track. Now, as you know, I think most people in this country in osteopathic and chiropractic clinics are probably using rehab my patient or perhaps another system, but I don't know about physio track. So does that mean that anyone who is using, let's say 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 Physio track in the UK and in North America, it is the only option that we have. I know 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 systems. I will say that we are 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 Jane that they need this particular function in the software?

James Purdy

Yeah, so that's a very good question.

Steven Bruce

It's almost as if we had planned it, it's almost as I saw this before we went on.

James Purdy

It is right. So we have this feature request bits. So anyone who signed into a Jane 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, so new features we've completed, things currently in progress and 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.

Steven Bruce

If they want to get in touch with you, where do they send their email?

James Purdy

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 more it shows us that it's 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?

James Purdy

Yes, I suppose the main thing's convenience with a lot of things. So if I select a random patient here in our demo site, so we have this extra tab for physio track along here. Right. So let's say I as a practitioner, maybe I've built some custom exercise programs in my physio track app, I wouldn't need to navigate away from Jane to open physio 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 track of them directly from it.

Steven Bruce

We've had Tim Allardyce on the show a few times. Tim is of course the guy behind rehab my patient and actually I think Tim is actually watching this show probably with an interest himself in whether Jane integrates with rehab my patient. But I take it from what you said that when we've got I think it was about

17 requests for rehab my patient, it was 3000 for something else below it. You can tell which one is going to be, yeah, 3500 to text patients from Jane, which you said it can do anyway.

James Purdy

Yes, I'm not sure what the difference is with, in fact, this is for me to check afterwards. I guess it's a different type of text messages.

Steven Bruce

But 3500 is going to get the attention of the Jane app team.

James Purdy

Yes, but definitely please keep asking us any email that comes in even if you're not a Jane customer, mention that desire for rehab my patient.

Steven Bruce

Let's get back to some of these. So this one's being called Sweet Hello, I can't believe anyone gave themselves that name. Sweet Hello says, how 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 they are an enormous payment processor, they work across every sector pretty much everyone these days uses Stripe.

Steven Bruce

We switched to Stripe in my clinic from WorldPay I think it was. And just the differences. It's the difference between PPS and Jane. Everything is so good.

James Purdy

Yes, and so 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 you've never seen before, you may want to 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 to patient as well, and they have an online portal through which they can pay any outstanding balance on their account.

Steven Bruce

I'll tell you what, one of the things that I, maybe a personal glitch in my system. But I have never liked taking money from patients in clinic, I always think it breaks down 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 software, and you can just say to the patient is it okay, if I just take patient payment from your existing card, that to me is a much friendlier transaction than get your wallet out and hand over the sticky five-pound notes. And I love it. And I'm sure, you know, Jane isn't the only app that does automatic payments. Everybody else, everybody else will do that as well. But it's a huge attraction to me in using an online system rather than the physical one. And of course, it takes the weight off receptionists having to do all that as well. And you can do all these booking the next appointment at the touch of a button.

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, I don't know. Does the software allow you to do a clinical audit? Now there is a great question. 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, can it?

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 going to say cool, this is everything you've asked for in a great big list. A new set of features, I 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 going to be so much better if I could show what this looks like, rather than just describe it.

Steven Bruce

Could you send us a demo video and I can send that out to people?

James Purdy

Yes, absolutely. I will do, I'll include, I think we've got a PDF that shows the different reports and what that does.

Steven Bruce

If you send them over, I can just share it.

James Purdy

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 less than a minute away from our closing time. So what are your final takeaway points on online systems for people?

James Purdy

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 comfortable with.

Steven Bruce

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

James Purdy

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

Steven Bruce

And take some feedback from others. At my clinic, we're always very happy to tell people what we think of Jane but then of course our experiences is solely Jane and PPS and there's no comparison between those. Jamie thanks. It's been brilliant. It's always a treat talking to you, you're such an enthusiastic person.

James Purdy

Thank you.

Steven Bruce

Yeah, and if you could send me that PDF, I'll get it out to people.

James Purdy

I will do, certainly will do.