MYNEWCLINIC

Practitioner Guide

Your complete guide to running your clinic in MyNewClinic — written for clinicians, no jargon. Everything here reflects what's actually in the app.

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Getting started

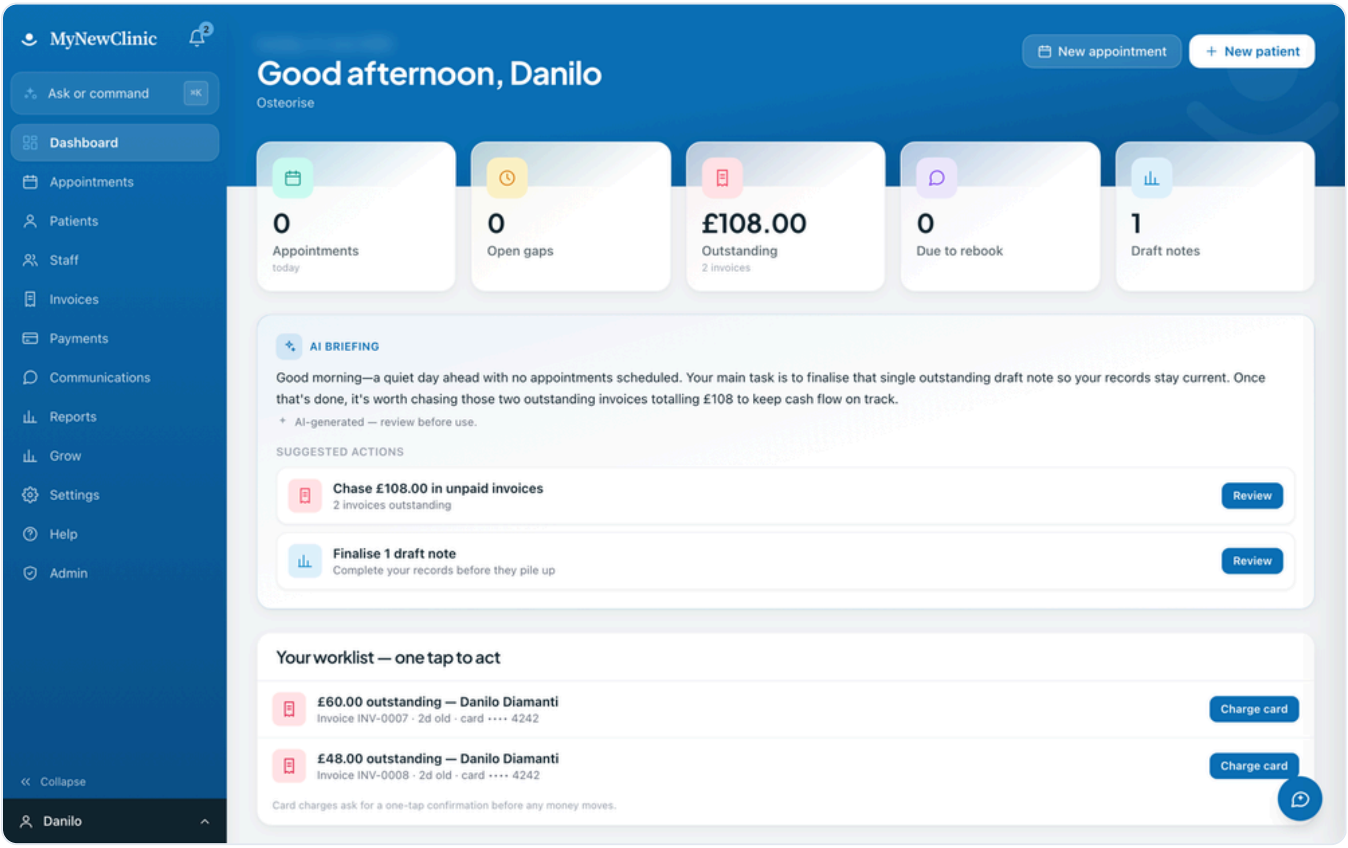
Welcome to MyNewClinic. This section guides you through creating your clinic, understanding your Dashboard, and completing the first-run checklist so patients can start booking.

Create your clinic

When you first sign in, you'll see a welcome form to set up your clinic.

1. Enter your **Clinic name** (e.g. "Riverside Osteopathy").
2. Create a **Booking URL slug** — this is the web address where patients book appointments online. It's 3–40 characters (lowercase letters, numbers and hyphens). Your public booking page will be `/book/your-slug`.
3. Enter your **First name** and **Last name**.
4. Add your **Profession** (e.g. Osteopath, Physiotherapist) and **Phone** number (optional).
5. Select your **Timezone** — this is pre-filled with your device's timezone.
6. Check the box to agree to the Terms of Service, Privacy Policy and Data Processing Agreement. You confirm you're the data controller for your patients.
7. Click **Create clinic** — you're now ready to go.

Your Dashboard at a glance



Your dashboard — greeting, stat tiles, the AI briefing and today's list

The Dashboard is your daily mission control. Here's what you see:

Top greeting — Shows the day, date, and your name. Quick buttons to create a new appointment or patient.

Stat tiles — Five cards showing today's snapshot: appointments, open gaps in your diary, outstanding invoices, patients due to rebook, and draft notes waiting to be finalised.

AI briefing — MyNewClinic watches your practice and suggests actions. It shows a brief narrative (e.g. "You've got 3 appointments today and 1 invoice overdue") plus a prioritised list of "suggested actions" — like "Chase £500 in unpaid invoices" or "Fill 2 open gaps in today's diary."

Today's appointment list — Shows every appointment on your calendar, with patient name, service, time and status.

Draft treatment notes — If you have notes to finish, they appear here so you can quickly jump in and finalise them.

Recent online bookings — The last 5 appointments patients booked via your online booking page.

Complete the getting started checklist

When you first land on the Dashboard, a checklist appears at the top under "Get your clinic ready." This guides you through the three essentials:

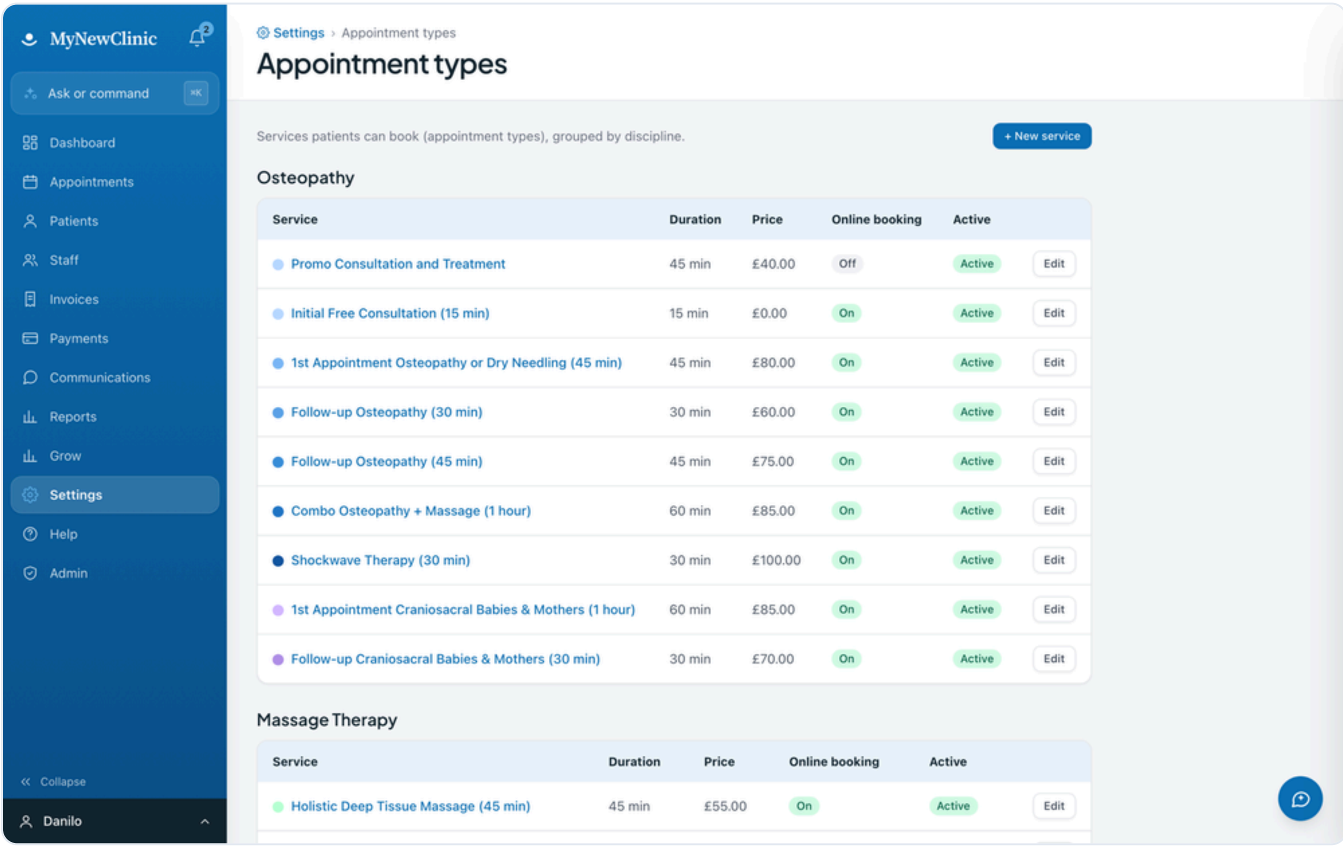
1. **Add your services** — Click the first checklist item or go to Settings > Services. Add the appointment types you offer (e.g. "Initial consultation 60 min" or "Massage 30 min"). Each service has a duration,

price, colour tag, and options to enable online booking and telehealth.

2. **Set your working hours** — Click the second item or go to Staff > your name > Hours tab. Toggle each day of the week on or off and set your start and end times (e.g. Monday 9am–5pm). Patients can only book when you're available.
3. **Add or import patients** — Click the third item to add your first patient by hand, or import your entire patient list from Cliniko or Jane. See "Import patients from Cliniko or Jane" below.

Once all three are done, the checklist vanishes — you're live.

Add your services (appointment types)



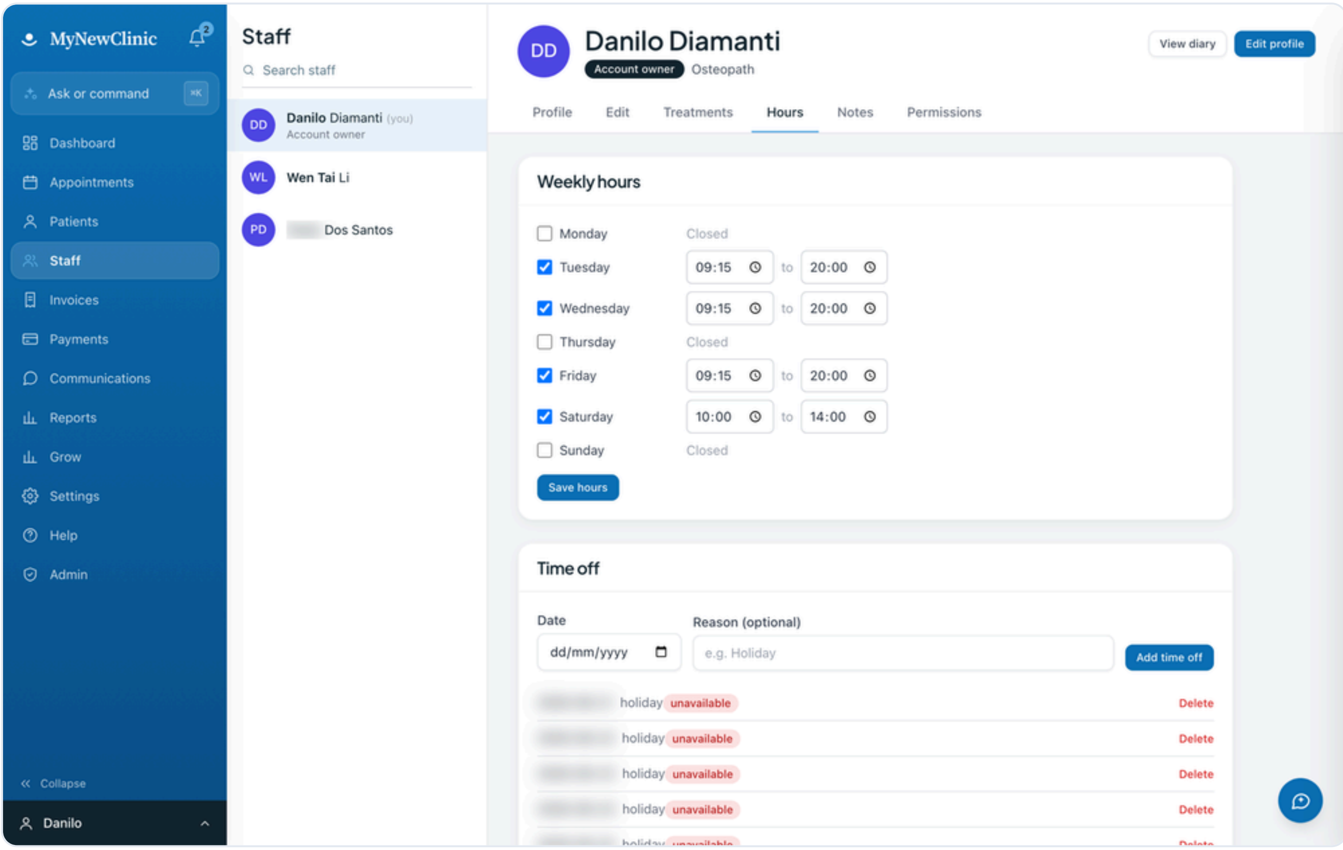
Settings → Services: every treatment you offer, grouped by discipline

Services are the treatments you offer — each one is a bookable appointment type.

Create a service: 1. Go to **Settings > Services**. 2. Click **+ New service**. 3. Fill in: - **Treatment Name** (required) — e.g. "Initial consultation" - **Discipline** — Organises services under headings in online booking (optional) - **Billing name** — An alternate name for invoices; leave blank to use the treatment name - **Description** — What patients see before booking (e.g. "60-minute full assessment and treatment plan") - **Booking Information** — Sent to patients after they book (e.g. "Arrive 10 minutes early; bring ID") - **Treatment Length** — Actual appointment duration (e.g. 45 minutes) - **Scheduled Length** — Time reserved in your diary; leave blank to match treatment length. Use this to build in breaks between patients (e.g. 50 min scheduled for 45 min treatment = 5 min break) - **Price** — In pounds - **Colour** — A tag colour for your diary - Toggles: **Available for online booking** and **Telehealth** (video appointments get auto-generated join links) 4. Click **Save**.

Edit or manage: On the Services page, you see a table of all your services. Click any service to edit it. Use the toggles to turn online booking on/off or mark inactive. Services are grouped by discipline; services with no discipline appear at the bottom.

Set your working hours



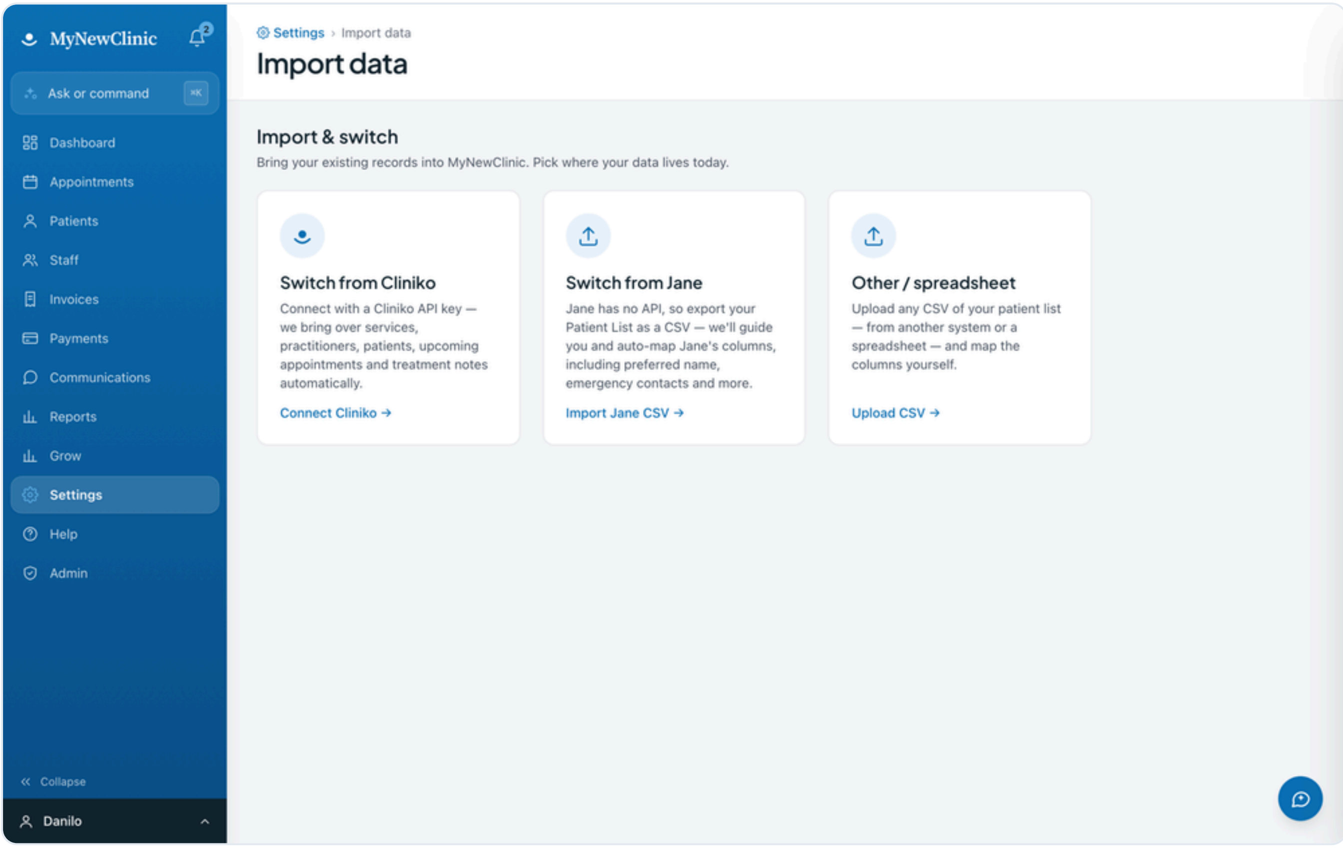
Staff → Hours: a practitioner's weekly working hours and time off

Tell MyNewClinic when you work so patients can only book when you're available.

1. Go to **Staff > [Your name] > Hours tab**.
2. For each day of the week: - Check the box to mark yourself available - Set start time (e.g. 9:00) - Set end time (e.g. 17:00) - Uncheck the box if you're closed that day
3. Click **Save hours**.

Add time off: On the same tab, scroll down to the **Time off** section. Enter a date and optional reason (e.g. "Holiday"), then click **Add time off**. This blocks the whole day or a time range from bookings. You can add multiple dates and delete them anytime.

Import patients from Cliniko



Settings → Import: bring your data from Cliniko, Jane or a spreadsheet

Bring all your Cliniko data into MyNewClinic in one go.

Step 1 — Connect: 1. Go to **Settings > Import & switch > Switch from Cliniko**. 2. Paste your **Cliniko API key** (find it in Cliniko > My Info > Manage API keys). 3. Select your **Cliniko shard** — the region bit after the dash in your API key (e.g. uk2, au1). 4. Click **Connect & preview**.

Step 2 — Choose what to import: MyNewClinic shows you a count of what it found (patients, services, practitioners, notes). Tick the boxes for: - **Patients** — Names, contacts, dates of birth, addresses - **Future appointments** — Upcoming bookings are recreated in your diary - **Treatment notes** — Imported as finalised notes on each patient's record

Services and practitioners always import. Click **Start import**.

Step 3 — Watch the progress: The import runs in the background. You'll see a checklist of what's being imported (Services, Practitioners, Patients, Appointments, Notes). It can take a few minutes. You can leave the page open or come back — the import keeps going.

Note: Patients are matched by email, so if you re-run an import later, duplicates are never created. Imported history never sends emails to patients.

Switch from Jane (patients, appointments & invoices)

Jane has no API, so you export a few reports and upload them — MyNewClinic reads Jane's format directly, so there's no column-matching to do.

In Jane — export these as CSV: 1. **Patient List** (required) — Settings > Reports > Patient List (or Patients > Export). 2. **Appointments** (optional) — Reports > Appointments. Export the date range you want as history. 3. **Sales** (optional) — Reports > Sales. This carries invoices, what was collected, and outstanding balances.

In MyNewClinic: 1. Go to **Settings > Import & switch > Switch from Jane**. 2. Drop in the CSVs — only the **Patient List** is required; add **Appointments** and **Sales** to bring over your diary history and invoices too. 3. Click **Start import**. It runs as a background job with a progress checklist.

What comes over: patients (with consent settings, emergency contacts and medical alerts), **past & future appointments**, and **invoices — including real payments and outstanding balances** from your Sales report. Patients are matched by email (then name + date of birth), so re-running never creates duplicates, and no emails are ever sent to your patients.

Import your Jane charts (clinical notes)

You can bring your chart history across too. In Jane, export your **chart data** — you'll get a folder of chart PDFs plus a manifest file (`chart_export.csv`).

1. Import your patients first (above), so the charts have someone to attach to.
2. Go to **Settings > Import & switch > Import Jane charts**.
3. Provide three things: your **Jane Patient List CSV** (used to match each chart to the right patient), the **chart manifest CSV**, and the **folder of chart PDFs**.
4. Click **Import**. Everything is processed in your browser — the PDFs are never uploaded — so there's no size limit, even for thousands of charts.

Each chart becomes a **dated SOAP treatment note** on the right patient (Subjective / Objective / Examination / Assessment / Treatment / Plan), kept signed or draft exactly as it was in Jane. Re-running skips charts already imported, so you never get duplicates.

Import patients from a spreadsheet or other system

If you're switching from another system or managing patients in a spreadsheet, upload a CSV.

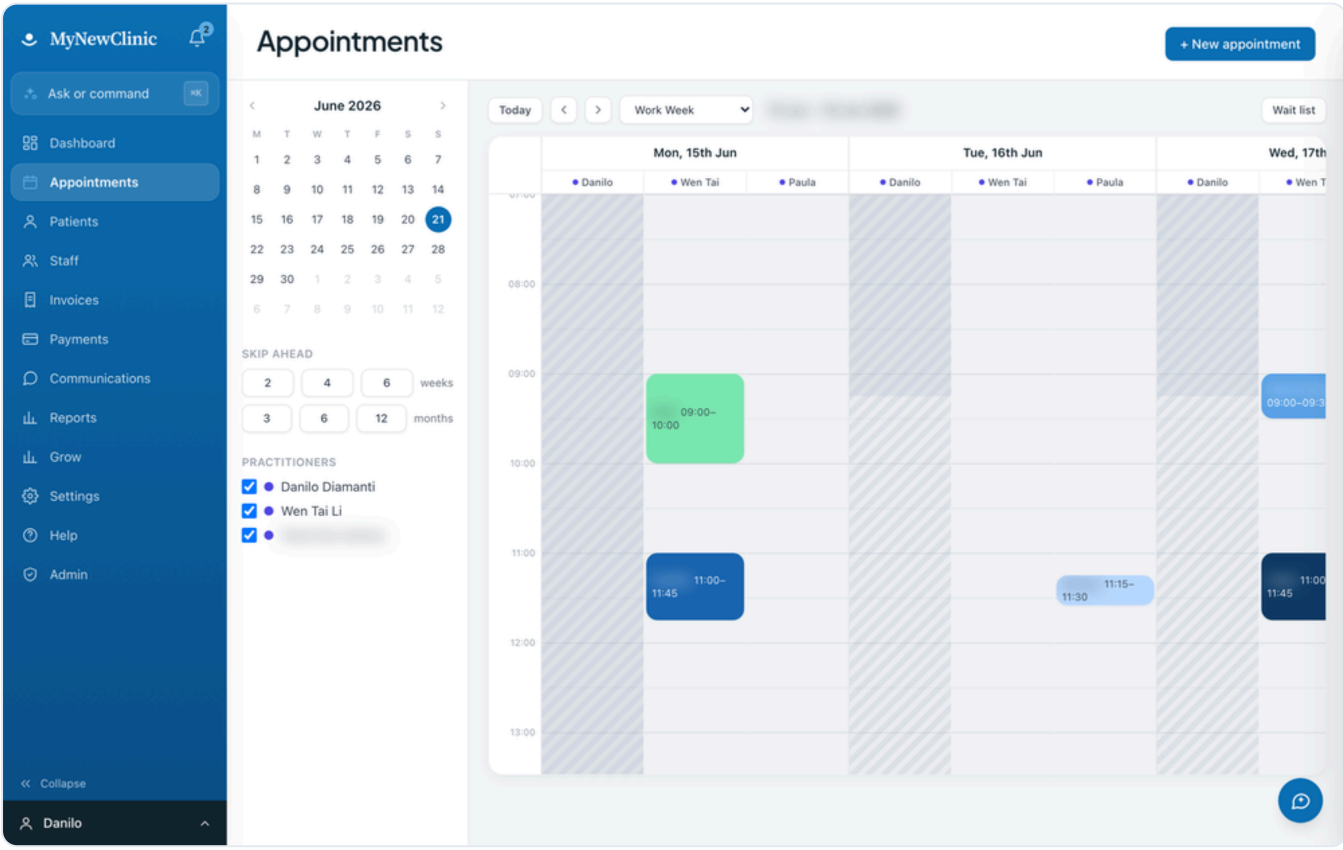
1. Go to **Settings > Import & switch > Other / spreadsheet**.
2. Upload your CSV file (must have headers in the first row).
3. In the **Match your columns** section, use the dropdowns to map your columns to MyNewClinic fields: - **First name** and **Last name** are required; all others are optional - Common fields: Email, Phone, Date of birth (DD/MM/YYYY or YYYY-MM-DD), Address, Gender, Occupation, Emergency contact name, Emergency contact phone, Notes, Preferred name
4. Review the **Preview** to check the mapping looks right.
5. Click **Import**.

Rows with missing first or last names are skipped. Any existing email addresses are matched and never duplicated.

The diary & appointments

Manage your clinic schedule with colour-coded appointment blocks, switch between day/week/list views, book new patients, and handle your wait list—all from one intuitive diary.

Navigate the diary on desktop

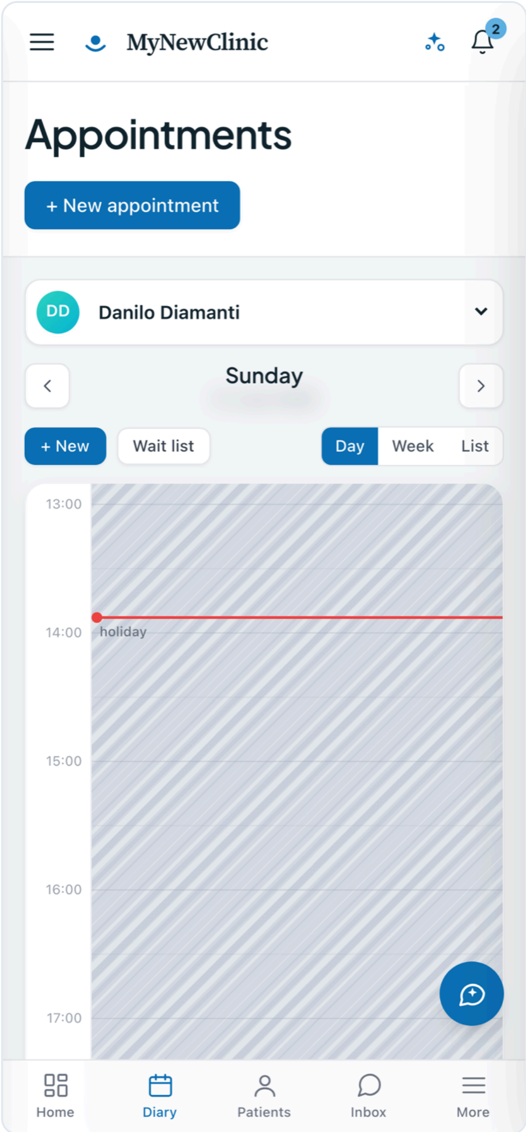


The week diary on desktop (patient names blurred for privacy)

Your appointment diary shows a week grid by default with practitioner columns, time slots, and a mini calendar on the left.

1. Use the **Work Week**, **Week**, or **Day** buttons to switch views—your choice is saved automatically
2. Click **Previous** and **Next** arrows to move through dates, or click a date on the mini calendar
3. Click **Today** to jump back to the current date
4. Click on any practitioner's checkbox in the left sidebar to show or hide their schedule
5. Use **Skip ahead** buttons to jump 2, 4, or 6 weeks (or 3, 6, 12 months) at once

Navigate the diary on mobile



The diary on a phone — the day timeline

Mobile shows one practitioner's schedule at a time, with your own practitioner account pre-selected.

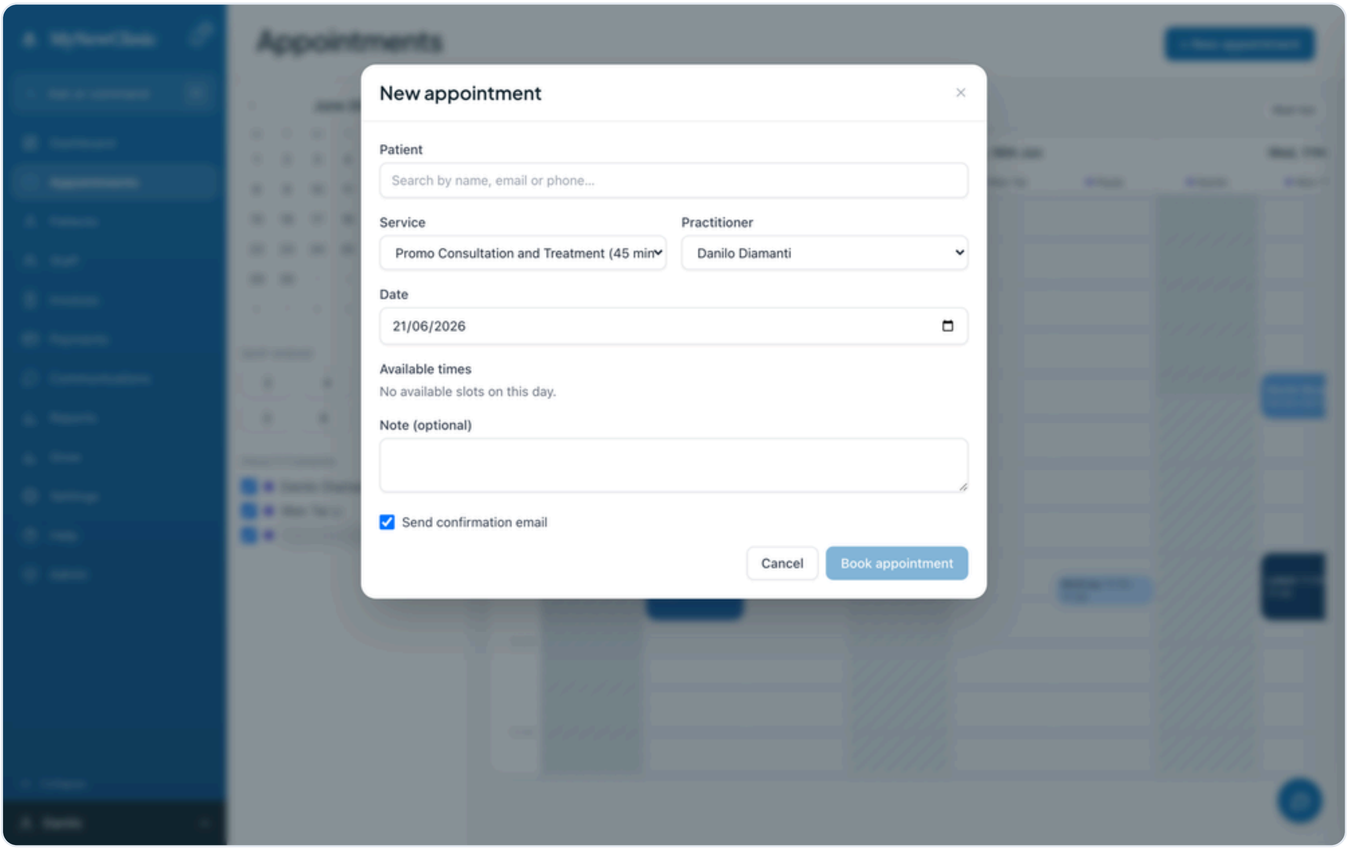
1. Tap the practitioner box at the top to pick a different practitioner from your team
2. Tap **Previous** and **Next** to move day by day (or week by week if you're in Week view)
3. Choose **Day**, **Week**, or **List** view at the bottom right—Day shows a Jane-style timeline, Week shows a 7-column grid, List shows appointments as scrollable cards
4. Appointments auto-scroll to "now" (if it's today) or to your first appointment
5. Tap **Today** to jump back to today
6. **Press and hold an empty slot** (Day or Week view) to book it — the new-appointment form opens pre-filled with that day, the 15-minute slot under your finger, and the practitioner you're viewing. Scrolling never triggers it; only a still press does

Understand the appointment blocks and colours

Each appointment appears as a coloured block with the patient's surname and time slot.

- **Coloured blocks** = active appointments; the colour is set per appointment type (e.g., osteopathy is blue, massage is green)
- **Grey hatched bands** = times outside your working hours; click to remove if you need to unblock a holiday or lunch break
- **Red line** = current time (visible only today, during working hours)
- **Faded text** = cancelled or no-show appointments; they don't take up a real slot
- On mobile, blocks show patient's first name + time in compact view, or full details in the timeline

Book a new appointment



The New appointment window

You can start from a blank form or click an empty time slot on the diary.

From the diary: 1. Desktop: click any empty slot in the grid — it pre-fills the date, practitioner and the nearest quarter-hour (upper half of a 30-minute row books :00/:30, lower half books :15/:45) 2. Mobile: tap **+ New**, or press and hold an empty slot to book that exact time

Either way: 1. Search and select a patient (or create a new one inline) 2. Choose a **Service** (e.g., Osteopathy 30 min) 3. Pick a **Practitioner** (if not pre-selected) 4. Pick a **Date** 5. Type a **Time** — you can book *any* time, even outside working hours (only a clash with another appointment or a time in the past is blocked). If the practitioner has free slots that day they appear as **Suggested times** chips — click one to fill the field 6. Add optional **Notes** 7. Tick **Send confirmation email** if you want the patient emailed 8. Click **Book appointment**

Blocking time instead of booking: the same **Service** dropdown has an **Unavailable blocks** group — **Lunch, Meeting, Travel, Unavailable**. Pick one and the form switches to From/To times (no patient needed), with an optional **Repeat weekly until** date for a recurring break. The block appears as greyed-out time on the diary; click it there to remove it.

View and edit an appointment

Click any appointment block to open the side panel on the right.

Front-desk actions (top buttons): - **Arrive** – marks the patient as checked in; this raises their invoice automatically - **Did Not Arrive** – flags a no-show - **Pay** – collect payment (only available after marking them arrived)

Appointment details: - Service name, date, time, and price - Patient's name, age, email, phone, and payment method on file - Practitioner assigned - Any pre-visit triage (complaint, red flags, patient answers) - Current invoice status and balance owing - Appointment status (booked / confirmed / arrived / completed / cancelled / no-show) — use the dropdown to change it

Move or reschedule an appointment

Reschedule a booked appointment to a different date, time, or practitioner without recreating it.

1. Click the appointment to open the side panel
2. Click **Reschedule**
3. Pick a new **Date** and **Time** (type or use the date/time pickers)
4. Pick the **Practitioner** (if moving to someone else)
5. Click **Save change** — it updates immediately

Change an appointment's service type

Swap out the appointment type (e.g., from 30-min massage to 45-min osteopathy) without rebooking.

1. Click the appointment to open the side panel
2. Click **Change treatment**
3. Pick a new **Service** from the dropdown (shows duration and price)
4. The appointment is updated instantly
5. If the visit is already invoiced, changing the service won't change the invoice — you'll see a note about this

Add or edit appointment notes

Store treatment notes, follow-ups, or special instructions attached to each appointment.

1. Click the appointment to open the side panel
2. Scroll down to **Notes**
3. Click **Add note** (or **Edit** if there's already a note)
4. Type your note
5. Click **Save note**

Cancel an appointment

Mark an appointment cancelled and optionally record why.

1. Click the appointment to open the side panel
2. Scroll to the bottom and click **Cancel appointment**
3. Optionally type a cancellation reason (e.g., "patient requested", "overbooking")
4. The appointment is removed from your schedule (but remains in the patient's history)

Handle no-shows and charge fees

When a patient doesn't arrive, mark them and optionally charge a no-show fee.

1. Click the appointment
2. Click **Did Not Arrive** (the status changes to red)
3. If you want to charge a no-show fee: click **Charge no-show fee** near the bottom of the side panel
4. Confirm — a fee invoice is raised (and the card on file is charged if they have one)
5. The percentage and rules for no-show fees are set in **Settings** > **Online bookings**

Manage the wait list

Patients who can't find a suitable time can join your clinic's wait list, either from your online booking page or you can add them manually.

1. Click the **Wait list** button (shows a badge with the count)
2. You'll see all waiting patients and their preferred service, practitioner, and date range
3. Click **+ Add to wait list** to manually add a patient with their preferred appointment type, practitioner, and date window
4. When an appointment becomes available, you can offer it from this panel
5. Click the **X** next to a patient to remove them (e.g., if they've booked or cancelled)

Schedule a return visit reminder

Set a reminder to prompt the patient to rebook (e.g., 6 weeks for a follow-up).

1. Click the completed appointment to open the side panel
2. Scroll to **Return visit** (near the bottom)
3. Click a time interval (2 wks, 4 wks, 6 wks, 8 wks, 3 mo, 6 mo)
4. The reminder is scheduled for that date
5. At the due date, the patient will be prompted to rebook when they visit your booking page
6. If they rebook before the due date, the reminder cancels automatically
7. Click **Cancel** on an active reminder to turn it off

Manage shifts, time off & breaks (Shifts button)

Edit working hours and block out time right from the diary — no trip to Settings.

1. On the diary, click **Shifts** (next to **+ New appointment**)

2. Pick the **practitioner**
3. **Time off & breaks:** choose a date (pre-filled with the day you're viewing) — leave the times empty for a **whole day off**, or set **From/To** for a **break within the day** (lunch, admin, a meeting). Existing entries are listed with a **Delete** button
4. **Weekly hours:** tick the days worked and set start/end times, then **Save hours** — the diary's grey shading updates immediately

Quick one-off breaks can also be added from **+ New appointment** → Service → **Unavailable blocks** (Lunch / Meeting / Travel / Unavailable), with an optional weekly repeat.

Breaks and days off show as greyed-out blocked time on the calendar — click a block there to remove it.

Patients

Manage your patient records from intake to discharge. Add patients, store their details, track appointments and billing, and use GDPR-compliant tools to protect their privacy.

Finding and filtering patients

Quickly locate any patient in your list by name, phone number, or email.

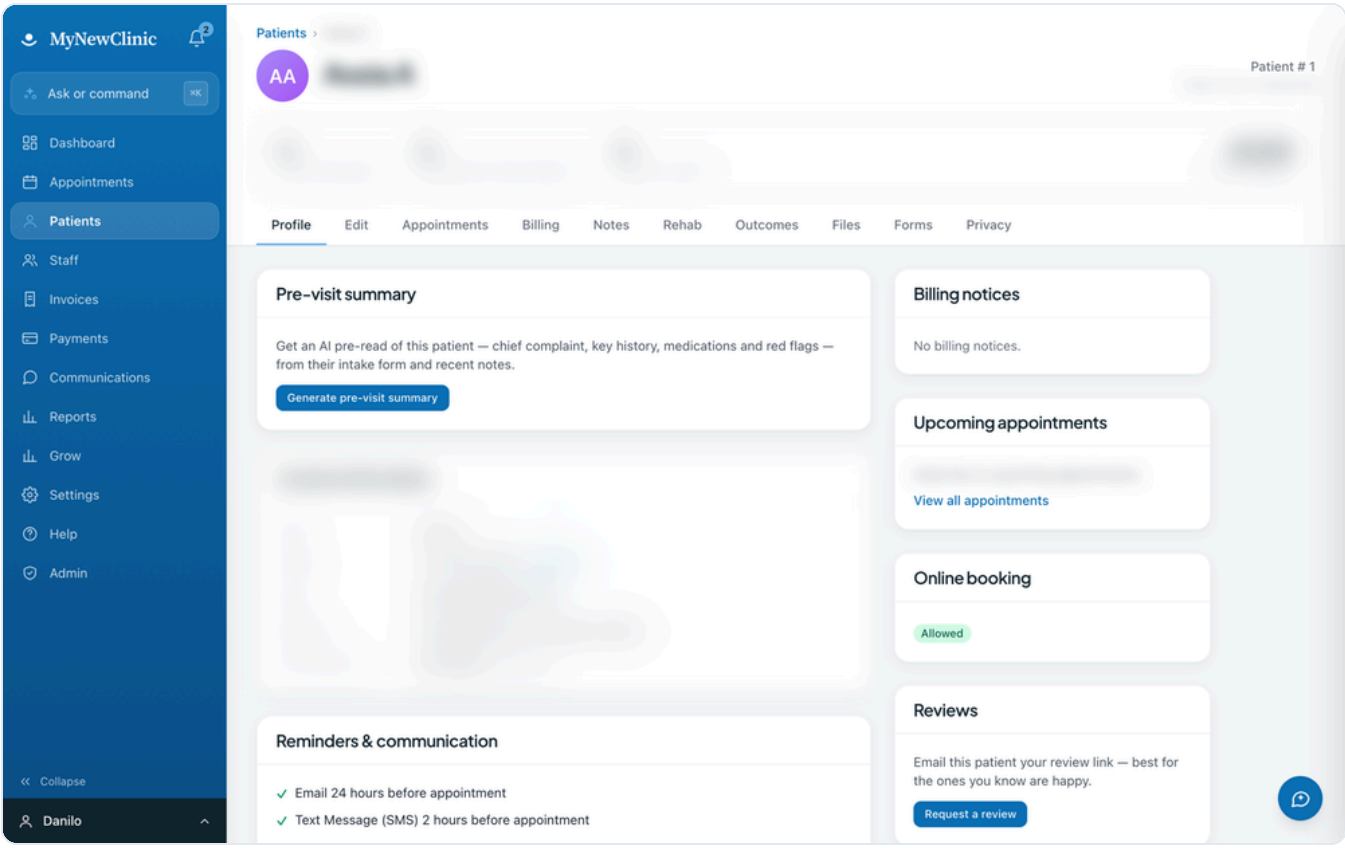
1. From the Patients page, type in the search box — results filter as you type
2. By default, you only see active patients
3. To see archived patients, check the "Show archived patients" checkbox
4. Click any patient's name or avatar to open their full record

Adding a new patient

Create a patient record with essential contact and demographic information.

1. Click **+ Add patient** at the top right of the Patients page
2. Enter required fields: first name and last name
3. Add optional contact details: email, phone, date of birth, and street address
4. Include any private admin notes (visible only to your team, not the patient)
5. Click **Save** — the patient is now in your system and you'll go to their record

Understanding the patient record overview



A patient's record — the Profile overview (personal details blurred)

The Profile tab gives you a snapshot of each patient at a glance.

You see their key stats: total bookings, upcoming appointments, no-shows, and any outstanding balance. Scroll down to find their contact info, related contacts (GP, referring professional, emergency contact, parent/guardian), communication preferences, and any admin notes you've added. If they have a next appointment, it's shown on the right. You can also request a review from happy patients or manage their online booking preference from here.

Editing patient details

Update identity, contact, preferences, and status information.

1. Click the **Edit** tab on the patient record
2. Update any field: name, pronouns, date of birth, occupation, health ID, gender, sex
3. Add or edit related contacts (GP, referring professional, emergency contact, parent/guardian)
4. Scroll to **Preferences** to control reminders, notifications, billing messages, marketing emails, and whether online booking is allowed
5. Use **Do Not Email** (red warning box) to completely block all emails to this patient — overrides all other settings
6. Use the **Danger zone** at the bottom to archive or unarchive a patient (archiving hides them from the default list but keeps all their data)
7. Click **Save patient** at the bottom — a confirmation message appears once saved

Getting an AI pre-visit summary

Before an appointment, get an AI-generated brief on the patient's chief complaint, history, medications, and red flags.

1. On the **Profile** tab, look for the **Pre-visit summary** card at the top
2. Click **Generate pre-visit summary** — the AI pulls from their intake form and recent notes
3. Within a few seconds, you'll see: a headline, any red flags (highlighted in red), presenting complaint, relevant history, medications & allergies, lifestyle notes, and focus points for the visit
4. Click **Refresh** anytime to regenerate the summary
5. Note: The summary is AI-generated from patient-provided information — always verify clinically

Viewing appointments

See all past and future appointments for a patient in one place.

1. Click the **Appointments** tab
2. Each appointment shows the type (e.g., "Initial assessment"), date and time, the practitioner's name, and its status (e.g., "confirmed", "cancelled")
3. You can see no-shows in the patient's stats at the top of their record
4. To book a new appointment, go to the Appointments section of MyNewClinic (separate from the patient record)

Managing treatment notes

Store and organise clinical notes from patient visits.

1. Click the **Notes** tab
2. Click **+ New note** to create a treatment note from a template or blank
3. Existing notes are listed with their date, title, and status (Draft or Final)
4. Click a note title to open and edit it
5. Draft notes are for work-in-progress; mark them Final when complete

Tracking billing and invoices

View invoices, record payments, and manage packages and memberships.

1. Click the **Billing** tab
2. **Card on file**: See if the patient has saved a payment card (from online booking) — you can remove it if needed
3. **Packages & memberships**: View active packages and sessions remaining, or sell a new package by clicking "Sell package"
4. **Invoices**: See all invoices with their status (draft, sent, paid, void). Click **Record payment** to log a manual payment, or **Stripe payment link** to copy a payment link to share with the patient

Recording rehabilitation exercises

Send exercise programmes to patients and track their progress.

1. Click the **Rehab** tab
2. Exercise programmes are created and sent from treatment notes (using SCRPT — AI clinical notes)
3. Each programme shows the number of exercises, creation date, and status (Draft or Sent)
4. Click on a programme to expand it and see each exercise with sets, reps, frequency, and linked video (if available)
5. Click **Send** to email the programme to the patient, or **Resend** if already sent

Tracking outcome measures

Record and visualise patient progress over time with outcome measures like pain, functional scores, etc.

1. Click the **Outcomes** tab
2. **Record an outcome**: Choose a measure (e.g., pain), enter the value, pick a date, and click **Add**
3. Each measure shows the current value, trend since first recording (improving/stable/worse), and a graph of all readings
4. Click the **x** on any reading to delete it
5. Once you have 2+ readings of the same measure, click **Generate** under "Progress insight" to get an AI read on whether the patient is improving, plateaued or declining — with a suggested next step
6. Note: AI insights are generated from the numbers — your clinical judgement guides the plan

Uploading patient files

Store documents such as scans, referrals, consent forms, ID, and letters securely.

1. Click the **Files** tab
2. Choose a category (Other, Scan/imaging, Referral, Consent form, ID, Letter) from the dropdown
3. Click **Choose a file** and select a PDF, image, or document up to 20MB
4. The file uploads and appears in the table below
5. Click **View** to open a file or **Delete** to remove it
6. The file list shows the document name, category, upload date, and who uploaded it

Share a document with the patient: each file has a **Share** toggle. Turn it on and the document appears in the patient's online portal under **Documents**, where they can view and download it. Files are private by default — nothing is shown to a patient unless you explicitly share it, and you can un-share at any time to revoke access.

Digitise paper records with your phone camera

Switching from paper folders? Turn a folder into a digital record in about a minute — no scanner needed.

1. On the **Patients** page, click 📷 **Digitise paper notes**. It's designed for a phone, so do this on your mobile if you can.
2. **Photograph the folder's front card** — the one with the patient's details. The AI reads the name, date of birth and contact details, then finds the matching patient (or offers to create a new record). Check what it read before continuing.
3. **Photograph the chart pages**, as many as there are.

4. Every page is saved to the patient's **Files**, and the handwriting is transcribed into a dated treatment note marked as imported from paper — so the history becomes searchable, not just photographed.

This uses AI processing, so **Enable AI data processing** (Settings → AI & data) must be on. Good light and straight-on photos give the best transcription.

Sending intake and consent forms

Send forms to patients and view their responses.

1. Click the **Forms** tab
2. Click **Send a form** to choose which form to send
3. Select the form from the dropdown — it's sent by email
4. A link is generated; you can copy it and share directly if needed
5. Once sent, the form appears in the table with its status: Pending (not yet completed) or Completed (with completion date)
6. Click on a completed form to expand it and see the patient's answers to each field

Protecting patient privacy (GDPR tools)

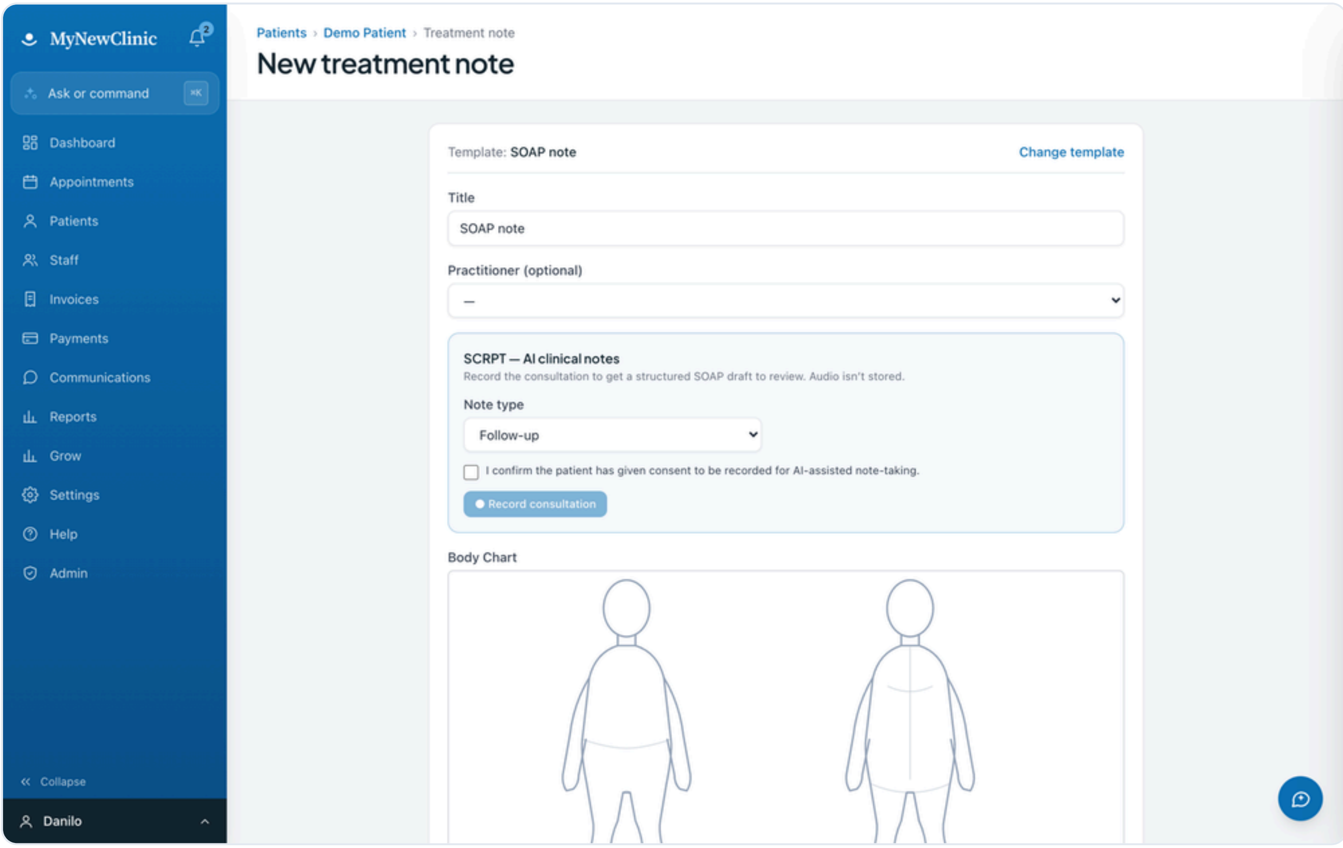
Meet data-protection requests and maintain an access log for compliance.

1. Click the **Privacy** tab
2. **Export all data (JSON)**: Click to download a complete JSON file of the patient's profile, appointments, notes, invoices, forms, reminders, and access log — for answering data-subject access requests
3. **Erase patient** (owner only): Permanently removes the patient's name, contact, date of birth, and saved payment card. Clinical and financial records are de-identified and kept per your retention policy. Requires you to type ERASE to confirm — cannot be undone
4. **Record access log**: See who viewed or changed this patient's record, with timestamps — automatically logged for audit trails

Clinical notes & charting

Record treatment sessions with templated or freeform notes, mark areas on a body diagram, and finalize notes for compliance. Your drafts save automatically as you work.

Start a new treatment note



The treatment-note editor, with the SCRPT AI note-taking panel

When you open a patient's record and start a new note, you'll choose how to structure it.

1. From the patient's page, click **New treatment note**.
2. You'll see a list of available chart templates plus a **SCRPT — AI clinical notes** option.
3. Choose a template that matches the session type (e.g., "Initial consultation", "Follow-up"), or select **SCRPT** for a blank note with AI recording.
4. Set the note title (e.g., "Initial consultation") and optionally assign a practitioner.
5. Start filling in the note.

Write a freeform SOAP note

If you chose a blank note or SCRPT, you'll have five standard sections to fill manually or via AI.

1. Fill in the five SOAP sections as you would normally: - **Subjective**: what the patient tells you - **Objective**: what you observe and measure - **Assessment**: your clinical interpretation - **Treatment**: what you did in this session - **Plan**: what happens next
2. Each field is a text box — type freely or edit after the AI transcription (below).
3. Your draft saves automatically every few seconds as you type.

Record a consultation and auto-draft the note (SCRPT)

SCRPT lets you record the session and automatically generate a SOAP draft — perfect for hands-on clinicians.

1. In a blank note, scroll to the **SCRPT — AI clinical notes** box.
2. Select the note type (New patient, Follow-up, or Discharge) from the dropdown.
3. Check the consent box: "I confirm the patient has given consent to be recorded for AI-assisted note-taking."
4. Click **Record consultation** and speak naturally about the session — the **transcript appears live** in a box as you talk (it fills in roughly every 25 seconds, so it runs slightly behind you). Audio is transcribed in short segments and is not saved.
5. Click **Stop** when done — the last segment finishes transcribing within a few seconds.
6. Review and edit the transcript in the text box, then click **Generate SOAP note**.
7. The AI fills in the five SOAP sections below — review and edit each one.
8. (Optional) Click **Search research evidence** to see published studies relevant to your assessment.
9. Click **Save draft** when happy with the note.

Because the recording is transcribed in short segments as you go, a brief internet drop only affects that segment (marked [...] in the transcript) — never the whole consultation.

Ask a clinical question (Clinical support)

While you're writing a note you can ask a plain-language clinical question and get a sourced, reference-style answer grounded in published evidence and your own clinic protocols, without leaving the editor.

1. Open a treatment note and find the **Clinical support** box in the SCRPT panel.
2. Type your question, for example "What are the red flags for low back pain?" or "First-line management for lateral epicondylalgia?"
3. Press **Ask** (or ⌘/Ctrl + Enter). The answer cites the published sources it used, and lists any of your own uploaded protocols it drew on.

Clinical support is reference information, not a diagnosis or a treatment plan. It surfaces what the evidence and your guidelines say for you to interpret; clinical judgement and responsibility remain yours. It needs the SCRPT add-on and AI data-processing switched on.

Upload your clinic's protocols and guidelines

Give Clinical support your own house rules so its answers reflect how your clinic works, not just published research.

1. Go to **Settings → AI & data** and find **Your clinic's guidelines & protocols** (owner or admin only).
2. Click **Upload** and choose a text-based PDF. Scanned image-only PDFs can't be read.
3. The document is split into searchable sections and stored privately for your clinic.

When you ask a Clinical support question, matching passages from your protocols are used first and cited as [P1], [P2], and they take precedence over general published research. Remove a document anytime from the same screen.

Use a chart template

Templates let your team standardize how you record exams, with custom fields like ranges, vitals, checkboxes, and body diagrams.

1. When starting a new note, pick a template from the list (e.g., "Cervical Spine Exam").
2. The note will show all the template's fields — headings, text boxes, checkboxes, sliders, vitals, and body diagrams.
3. Fill in each field as prompted. Required fields are marked with a red asterisk.
4. If the template supports SOAP, you can still use SCRPT recording at the top — the AI will map findings into the template fields automatically.
5. Your answers save as a draft automatically.

Mark areas on the body chart

If your note or template includes a body diagram, you can mark findings directly on it.

1. Scroll to the **Body chart** field in your note.
2. Draw on the diagram with your mouse, trackpad, or finger.
3. Use **Undo** to step back one stroke, or **Clear** to start over.
4. Your drawing is saved as part of the note when you save the draft.

Understand auto-save and drafts

MyNewClinic automatically saves your work as you type, so you never lose a note in progress.

1. As you edit, the system saves automatically every second or two — you'll see "Draft saved automatically" at the bottom of the page.
2. Drafts are marked with a **Draft** badge in the top right.
3. If you close the browser tab or navigate away while editing, the draft is flushed to the server so it's safe to return to later.
4. You can click **Save draft** manually at any time to trigger an immediate save.

Finalize a note and sign it

When the session is complete and you're happy with the note, finalize it to lock it for compliance.

1. At the bottom of your draft, click **Finalize**.
2. Confirm the prompt: "Finalize this note? Finalized notes cannot be edited."
3. The note is now locked and marked with a **Final** badge — it cannot be changed.
4. A timestamp (created date/time) is recorded with the note.

A finalized note isn't a dead end: the **Letters & reports** and **RehabRx — exercise programme** panels stay available on it — they only *read* the note to draft a letter or build a programme, the locked note itself is never modified.

Add a note addendum (correction or late entry)

If you finalized a note but need to add information later (e.g., a missing finding or correction), use an addendum instead of editing.

1. Open the finalized note — you'll see an **Addenda** section at the bottom.
2. Type your addition or correction in the text box.

3. Click **Add addendum**.
4. The addendum is recorded with your name, the date, and time — the original note stays locked and unchanged.
5. This approach maintains a clear audit trail for regulatory compliance.

Attach files to a treatment note

Keep referral letters, scan images or photos with the note they belong to.

1. Open the note and scroll to the attachments area under the editor.
2. Click **Attach file** and pick one or more files (photos, PDFs, documents).
3. Each file appears in the list — click its name to view it, or the bin icon to remove it.

Attachments are also filed on the patient's **Files** tab, tagged to the note, so you'll find them from either place. The signed content of a finalised note stays locked — attachments live alongside it, not inside it.

Manage chart templates (Settings)

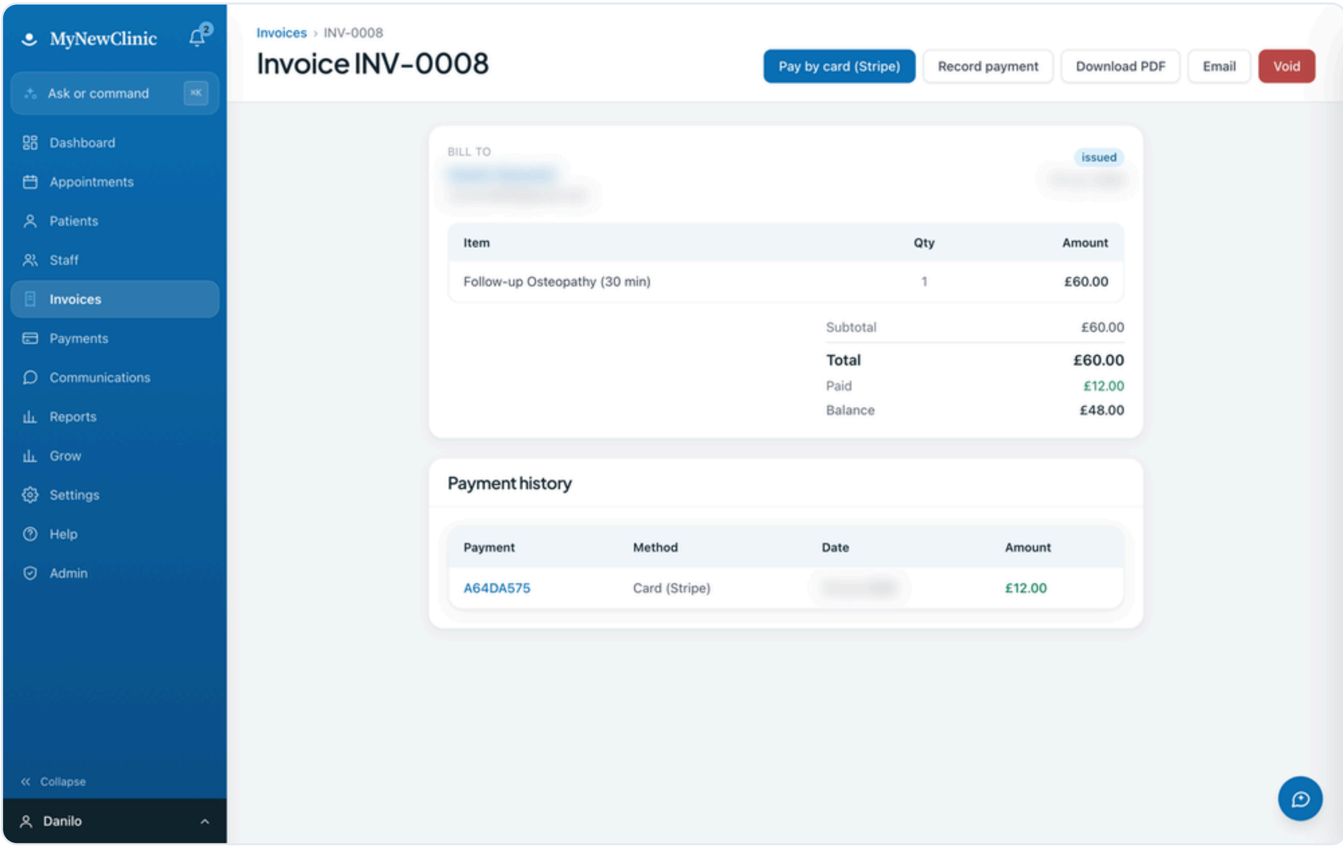
Your clinic admin can set up custom templates so your team charts consistently.

1. Go to **Settings → Chart templates**.
2. You'll see a list of active templates your clinic uses.
3. Click a template name to edit its fields, or use the menu to: - **Duplicate**: copy a template as a starting point for a new one. - **Archive**: hide an old template from new notes (existing notes keep their data). - **Delete**: remove a template entirely (existing notes keep their data).
4. Click **+ New template** to create one from scratch, or **Add starter templates** to load pre-built examples.
5. When you create a new note, only active templates appear in the chooser.

Invoicing & Payments

Send invoices to patients, take card payments via Stripe, record cash and bank transfers, and manage recurring packages and membership subscriptions.

Raise an invoice



Raising a new invoice

Create a custom invoice for any service, with multiple line items and optional notes.

1. Go to **Invoices** and click **+ New invoice**
2. Search for and select the patient
3. Add line items by entering a description, quantity, and price for each service (e.g. "Initial consultation", 1 × £75)
4. Click **+ Add item** to add more lines
5. Optionally add a note (visible only to you)
6. Review the total at the bottom and click **Create invoice**

Your invoice is now drafted and ready to send or pay. You can view it anytime from the invoice list.

The invoice page — reading and editing an invoice

Open any invoice and you'll see a professional layout on screen and on the PDF:

- **Header:** invoice date, status, patient — plus **Bill To** and **Payable To** (your legal entity, e.g. "Osteorise LTD" — set it once in **Settings → General settings → "Payable to"**)
- **Item lines** show the appointment's date and time, the treatment, and the practitioner with their registration (e.g. "Danilo Diamanti, License #GOsC 11459" — set each clinician's **Registration** in **Staff → Edit**)
- **Subtotal / Tax / Total**, then a **Payment History** table
- The PDF gets a **PAID** or **VOID** watermark when settled or voided

Editing: click **Edit** on the invoice to change the **item descriptions**, add a free-text **Details** note, or correct the **invoice date** — then **Save**. Amounts are deliberately locked (change a price with an adjustment, or void and re-issue) so payments always reconcile.

View appointment jumps straight to the linked appointment on the diary.

Take a Stripe card payment online

Send your patient a secure payment link to pay by card—no terminal needed.

1. Go to **Invoices** and find the invoice
2. Click the three-dot menu and select **Stripe payment link**
3. A link is copied to your clipboard automatically
4. Share the link with your patient (by email, text, or however you prefer)
5. They enter their card details and pay
6. The payment is recorded automatically in your invoice

This is ideal for remote patients or when you want to reduce the back-and-forth. Payment is processed securely by Stripe, the payment processor.

Record a manual payment (cash, card terminal, bank transfer)

Log a payment your patient has already made to you in person or by bank transfer.

1. Go to **Invoices**, find the invoice, and click the three-dot menu
2. Select **Record payment**
3. Enter the amount (defaults to what's still owed)
4. Choose the method: **Card** (card terminal or POS), **Cash**, **Bank transfer**, **Stripe**, or **Other**
5. Optionally add a reference (cheque number, bank reference, etc.)
6. Click **Record payment**

For **card payments on file**: If you've saved a patient's card (from a previous online booking), you can charge it directly from the **Receive payment** button on their patient profile instead—this charges immediately via Stripe.

Receive payment from a patient (bulk method)

Record one or more payments at once from a patient with multiple outstanding invoices.

1. Go to a patient's profile
2. Click **Receive payment**
3. All their outstanding invoices appear, each showing the balance owed
4. Check the invoices you want to collect payment for (tick the box)
5. Edit the amount for each if needed (defaults to full balance)
6. Choose the payment method (Card terminal, Cash, Bank transfer, or Other)
7. If they have a **card on file**, you can select that to charge immediately via Stripe
8. Click **Record [amount] payment**

This approach is faster when a patient is settling multiple invoices at once.

View and track all payments

See a complete record of who paid what and how.

1. Go to **Payments**
2. Use the search box to filter by patient name or payment reference
3. The table shows each payment with the patient, amount, method (badge showing Card / Cash / Bank transfer / Stripe / Other), and date
4. Click a payment link to jump to the related invoice

Each payment is timestamped and includes the method used, so you always know how the money came in.

Set up a package or membership

Create prepaid session bundles or monthly recurring memberships.

1. Go to **Settings** and select the **Packages** tab
2. Click **+ New**
3. Enter a name (e.g. "10-session massage pack") and optional description
4. Choose **Type**: - **Package**: One-off bundle, optionally valid for a set number of days - **Membership**: Renews monthly; sessions reset each month and a new invoice is raised automatically and charged to the patient's saved card
5. Enter the number of sessions and price
6. For packages, optionally set an expiry period in days
7. Under **Treatments it covers**, tick the specific treatments if you want to limit it (or leave all unticked to cover every treatment type)
8. Click **Save**

To sell a package or membership, visit the patient's **Billing** tab and click the option to sell it. Sessions are redeemed automatically when the patient arrives for an appointment.

Create a discount or promo code

Set up a code (like WELCOME10) that patients can use when booking online or that you can apply manually to invoices.

1. Go to **Settings** and select the **Discount codes** tab
2. Click **+ New code**
3. Enter a code (e.g. WELCOME10) and optional description
4. Choose **Type**: - **Percentage off**: Enter 1–100 (e.g. 10 for 10%) - **Fixed amount off**: Enter a £ amount
5. Optionally set a start date, expiry date, and max uses (leave blank for no limit)
6. Under **Treatments**, tick specific treatments if you want to limit the code, or leave all unticked to apply to every treatment
7. Click **Save code**

Patients can enter the code during online booking. You can also **Enable** or **Disable** a code anytime without deleting it. If you delete a code, invoices already given that discount keep it.

Where patients see receipts

Your patients can view invoices and receipts in their online portal.

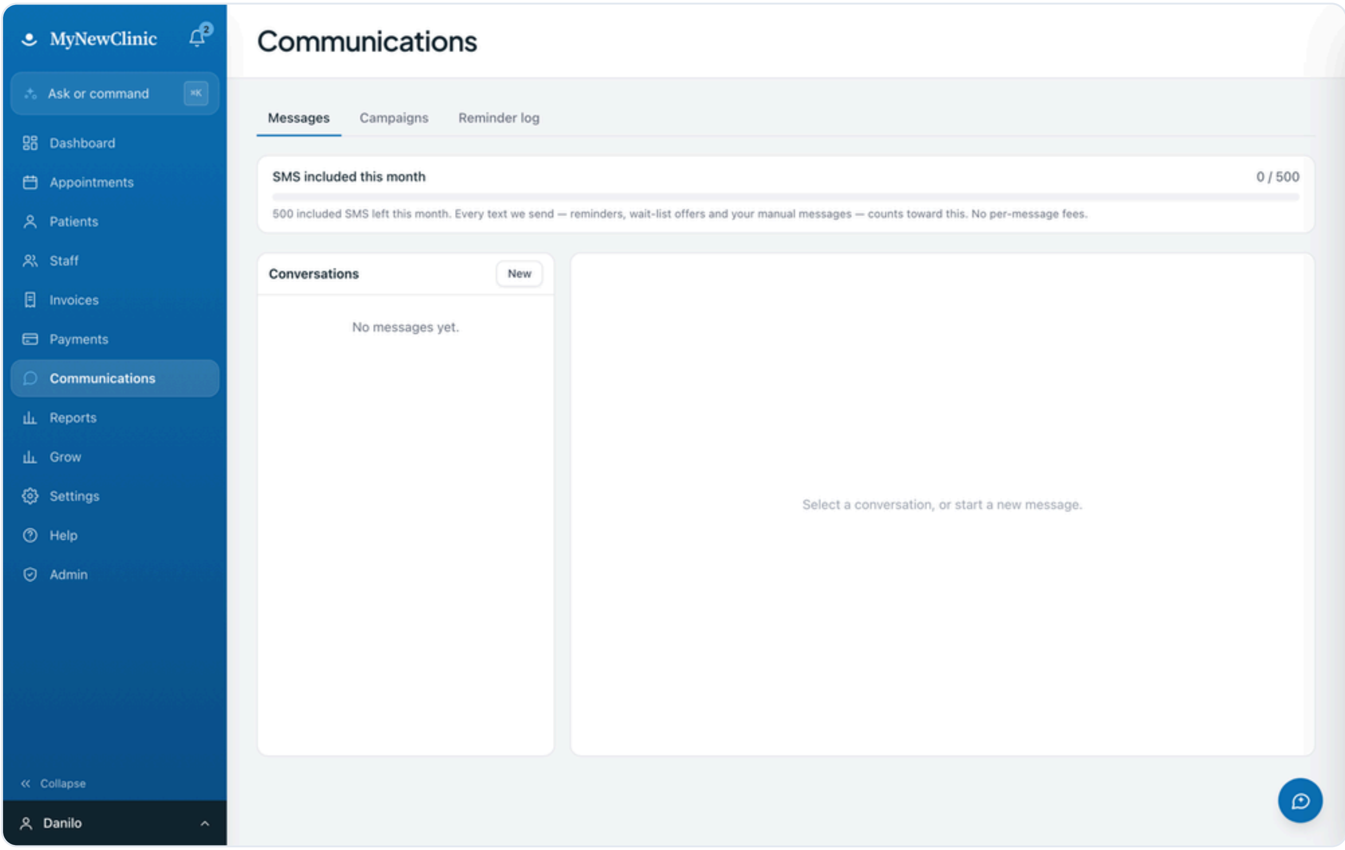
- Once an invoice is issued (not in draft), it becomes visible to the patient in their **Billing** tab in the patient portal
- They can download it as a PDF
- When a payment is recorded, the patient sees it updated immediately
- If you send them a Stripe payment link, they receive a secure receipt from Stripe after payment

Make sure you've communicated the portal login to your patients so they know where to find their invoices.

Communications & Reminders

Keep in touch with patients via SMS and email. Send reminders before appointments, manage your SMS conversations, run designed email campaigns with offers, and see exactly what was sent in the reminder log.

Send SMS and manage conversations



Communications — sending SMS and managing conversations

By default, SMS is sent **from your clinic's name**, so it's send-only — ideal for reminders, wait-list offers and quick messages. If you set up a sending number (see **Configure your SMS phone number** below), patients can reply too, and their replies appear here as conversations.

1. Go to **Communications** → **Messages**.
2. You'll see your conversation list on the left — each patient you've messaged, plus any replies (with unread badges) once a sending number is set up. Click a conversation to open it.
3. To start a new message, click the **New** button and enter the patient's mobile number.
4. Type your message in the text box at the bottom and click **Send**. Messages appear as bubbles — yours on the right, the patient's on the left.
5. Each message shows when it was sent and its status ("Sent", "Scheduled", "Failed", or "Cancelled").

Tip: If a patient's number is linked to their record, you'll see their name and a link to their patient page.

Set up automatic appointment reminders

You can automatically remind patients about their appointments by email and/or SMS. Reminders only send when you turn them on.

1. Go to **Settings** → **Reminder settings**.
2. In the **Appointment reminders** section, set how many hours before each appointment patients are reminded: - **Email reminder (hours before)** — how long before the appointment to send email reminders (e.g., 24 = one day before). - **SMS reminder (hours before)** — how long before the appointment to send SMS reminders (e.g., 2 = two hours before).
3. Set either to **0** to turn off that channel — reminders won't send at all if set to 0.
4. Click **Save changes**.

Example: If email is set to 24 and SMS to 2, a 10am appointment gets an email reminder at 10am the day before and an SMS reminder at 8am on the appointment day. Reminders respect patient messaging preferences and opt-outs.

Configure your SMS phone number

SMS texts are sent from your clinic's phone number. You need to set this up so replies are routed back correctly.

1. Go to **Settings** → **Reminder settings**.
2. In the **SMS number** section, enter your Telnyx mobile number in E.164 format (e.g., +447700900123).
3. Click **Save changes**.

Note: This number must match what's configured on your server (contact your system admin if you're not sure). It's how the system knows which clinic patient replies belong to.

Review the reminder log

The reminder log shows every appointment reminder your clinic has sent or scheduled — so you can verify reminders are going out and spot any issues.

1. Go to **Communications** → **Reminder log**.
2. You'll see a table of all reminders with columns for Date, Type, Direction (Sent/Scheduled/Failed/Cancelled), Patient, and Practitioner.
3. Use the search box to filter by patient or practitioner name.

4. Use the **Filter by type** dropdown to show only Email or SMS reminders (or leave it on All).
5. If a reminder failed, you'll see an error message in the Type column — click the patient's name to check their details and resend if needed.

Tip: The log shows "Appointment Reminder" as the type and includes details like the appointment type and date. Reminders that haven't sent yet show as "Scheduled".

Send an email campaign (offers & newsletters)

Mailchimp-style campaigns, built in — announce news, run an offer, fill quiet weeks.

1. Go to **Communications → Campaigns**. The **New campaign** card is the composer.
2. Design the email: headline, message, button, an optional image and your accent colour — the preview updates as you type.
3. Pick the **Audience** — everyone, or a segment such as patients not seen for 3+ months. The send button shows the live recipient count.
4. Optionally attach a **discount code** (see *Create a discount or promo code*). A code can be restricted so only qualifying patients — for example those lapsed 3+ months — can redeem it. Eligibility is enforced at booking, so a forwarded email can't leak the discount.
5. Click **Email me a test first** — the exact email arrives in your own inbox with a [TEST] subject.
6. Happy? Click **Send campaign**. Sending is paced a few emails per minute to protect deliverability, so a big list takes a while — you can leave the page.
7. Click **Results** on any sent campaign for the numbers: delivered, failed, who unsubscribed since the send, and bookings made with the campaign's code.

Campaigns only go to patients opted in to marketing, and every email carries an unsubscribe link that updates the patient's record automatically.

Send a one-off email reminder from the appointment panel

Automatic reminders run on their own schedule, but sometimes you want to nudge one patient right now.

1. Open the appointment in the diary.
2. In the side panel, click **Email reminder**.
3. The standard reminder email goes out immediately (respecting the patient's email preferences) and is recorded in **Communications → Reminder log** like any other reminder.

Who gets emailed when a booking is made or cancelled

Patients get a confirmation email when they book and a written confirmation when an appointment is cancelled — sent under your clinic's name, with replies going to your clinic email address.

Practitioners get a heads-up email for every booking and every cancellation in their diary, whatever the channel — online booking, patient portal, AI receptionist, Treatwell, or a colleague at the front desk. It goes to the address they log in with. If one seems missing, check spam and mark it "Not spam" once — after that they land in the inbox.

Pause all patient messaging (testing mode)

If you're setting up or testing your clinic, you can pause all automatic patient emails and SMS messages so nothing goes out to patients by mistake.

1. Go to **Settings** → **Reminder settings**.
2. In the **Patient messaging** section, check **Pause all patient emails & SMS**.
3. Click **Save changes**.

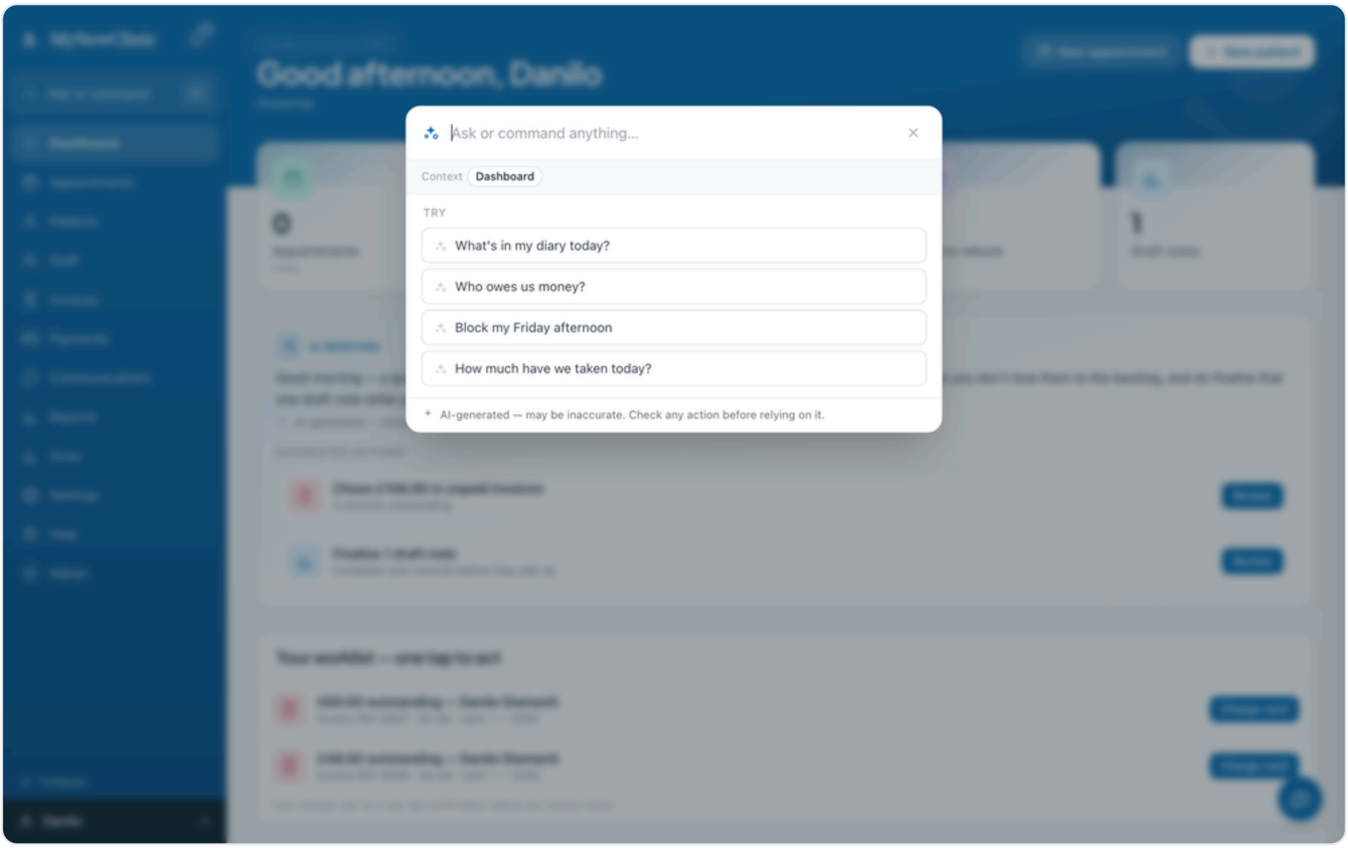
While paused: No appointment reminders, confirmations, intake forms, wait list offers, or portal login links are sent to patients. Staff invitations are still sent normally.

Important: Remember to uncheck this before you go live with your clinic, or reminders won't reach your patients.

The AI features

MyNewClinic includes powerful AI capabilities to help with clinical documentation, patient engagement, and decision-making. The AI always works in the background — you review and approve every action before anything happens.

Run your clinic with the ⌘K command bar



The ⌘K command bar — ask or command anything, from any screen

Press **⌘K** (Ctrl+K on Windows) from any screen — or click **Ask or command** at the top of the sidebar — to open the command bar. Type what you want in plain English and your AI operator does it:

1. **It knows where you are.** On a patient's page, "book them in next Tuesday afternoon" or "what do they owe?" resolves to that patient. On an invoice, "charge this to the card on file" or "send a payment link" acts on the invoice you're viewing.
2. **Book, block, invoice, chase — in one line.** "Block my Friday afternoon", "invoice this visit", "send a payment link for INV-0007", "what's in my diary today?".
3. **Money is always confirmed.** Anything that moves money (charging a card, a refund) comes back as a Confirm button — the operator never charges without your click.
4. **It's included.** The AI Assistant comes with every MyNewClinic subscription — no add-on. Switch AI data-processing on in Settings > Security & 2FA first; your data only leaves the clinic once you do.

The floating sparkle button (bottom-right) is the same operator in a chat drawer — use whichever you prefer. Every action appears as a confirmation; dismiss anything you don't want.

Ask your data — instant answers, no reports to build

The command bar also answers questions about your clinic, so you never have to configure a report:

1. **Headline numbers** — "How many new patients this month vs last?", "What's our no-show rate this week?", "How much have we taken this month?"
2. **Breakdowns** — "Revenue by service this quarter", "card vs cash this month", "busiest day of the week".
3. **Patient lists you can act on** — "Who hasn't rebooked?", "Show me lapsed patients to recall", "Top patients by spend".

You get the figure — or a short, capped list — straight back. New-patient counts are based on a patient's first visit (so an import doesn't read as a growth spike), revenue is net of discounts, and the operator tells you when a number is based on a capped sample. It's built to be honest, not just fast.

Let the operator work on its own (opt-in autonomy)

By default the operator proposes and you approve. When you're ready, you can let it resolve the safe, repetitive tasks **by itself** — on a leash you set.

1. Go to **Settings > Clinic > AI operator** and switch on **Let the operator act on its own**.
2. Choose what it may do automatically: **fill cancellations** (offer freed near-term slots to your wait list), **chase overdue invoices** (email a gentle pay-online link, re-chased every few days for up to two weeks, then handed back to your bell if still unpaid), and **send no-show fee links**.
3. That's it — it runs quietly in the background, every 15 minutes.

The guarantees are firm: **money never moves on its own** — charging a card always needs your Confirm, autonomy only ever *sends a link*. **Nothing is sent while patient messaging is paused.** Every auto-action is **logged** and appears in **Reports > AI operator > Recent automatic actions** and your weekly digest. And you can switch any of it **off in one click**.

Generate AI letters and clinical reports

When you're writing a treatment note, use the **Letters & reports** panel to draft professional correspondence directly from your notes:

1. Open a patient's treatment note in the note editor.
2. Scroll down and open **Letters & reports**.
3. Choose a letter type: GP referral, discharge summary, insurance report, or patient letter.
4. (Optional) Add extra instructions — "address to Dr Smith; emphasise the need for an MRI."
5. Click **Generate draft** and the AI creates a letter from your note.
6. Review and edit the draft — AI can make mistakes.
7. Click **Save to record** to store it in the patient's correspondence file.
8. **Print / PDF** or **Copy** to send it on.

Older letters stay saved on the patient's record — click View to reread them, Print to output them again, or Delete to remove them.

The letter pulls the patient's details from their record — full name, date of birth, address, and (for GP referrals) their **GP's name** from **Edit → Related contacts → GP**. Keep those filled in and letters come out complete; anything missing from the record appears as a [placeholder] for you to fill by hand. If the note's content clearly describes a different person than the attached record, the AI deliberately won't stamp the record's identity onto it — check the note is on the right patient.

Get a pre-visit summary before you see a patient

Before you see a patient, the AI can read their intake form and recent notes to give you a quick clinical picture:

1. Go to the patient's profile (click their name in the appointment list or search for them).
2. On the **Profile** tab, find **Pre-visit summary**.
3. Click **Generate pre-visit summary**.
4. The AI returns: presenting complaint, relevant history, medications & allergies, lifestyle factors, and any red flags it spotted.
5. Scan it before you go in — it's a heads-up, not gospel. Always verify clinically.
6. Click **Refresh** any time to regenerate it from updated notes.

This only works if the patient has completed an intake form or you have recent treatment notes on file.

Track patient outcomes and get AI insights

Record standardised outcome measures (pain, function, disability) to show progress over time:

1. Open a patient's record and go to the **Outcomes** tab.
2. Pick a **Measure** (e.g., pain on a 0-10 scale).
3. Enter the **Value** and confirm the **Date**.
4. Click **Add** to record it.
5. Keep recording over visits. The system graphs the trend and shows you whether they're improving, staying the same, or worsening.
6. Once you have at least two readings of the same measure, click **Generate** under **Progress insight** to get an AI summary of progress plus a suggested next step.

Your clinical judgment always comes first — the AI insight is a prompt to think, not a prescription.

Re-engage lapsed patients with AI-drafted recall emails

The **Grow** page finds patients you haven't seen in a while and helps you win them back:

1. Click **Grow** in the main menu.
2. Choose how long — 3, 6, 12, or 24 months.
3. A list appears of patients who haven't been in recently.
4. Click a patient row to expand it.
5. Click **Draft with AI** to generate a warm, personal re-engagement email.
6. Edit it if you want.
7. Click **Send email** to send it (the system respects their email and marketing opt-out preferences).
8. The status changes to **Sent**.

You can also set up automated recall reminders in Settings > Reminders — those work independently.

Review your AI briefing and suggested actions

Every time you log in, the Dashboard gives you an **AI briefing** — a quick narrative of your day plus a prioritised to-do list:

1. On the home page, find the **AI briefing** card (highlighted with a sparkle).
2. Read the narrative — it summarises outstanding invoices, recalls, gaps in your diary, and draft notes waiting for you.
3. Below that, **Suggested actions** are ranked by urgency: - Chase unpaid invoices - Re-engage lapsed patients - Book overdue recalls - Fill gaps in your diary - Finish draft notes
4. Click the **Review** or **Draft recalls** button to jump straight to that task.
5. If everything's done, you'll see **You're all caught up** — nice.

The briefing loads when you first visit the Dashboard. It pulls from your appointments today, outstanding invoices, recent recalls, and draft notes.

AI ultrasound & imaging reports (Imaging tab)

Upload scan images and get a drafted report grounded in the patient's chart history.

1. Open the patient's record and go to the **Imaging** tab.
2. In **Upload a scan**, choose the images — up to 10 per study (for example several views from one ultrasound exam).
3. Click **Upload & analyse**. The AI reads the images together with the patient's chart notes and drafts a structured report, including a **Clinical correlation** section tying the findings to the presenting complaint.
4. Review and edit — the report is a draft for your clinical judgement, not a diagnosis. Individual scans can be deleted, and everything stays on the patient's record.

Like all AI features this needs AI data processing enabled, and it works best when the patient's notes are up to date — that's the history the correlation draws on.

Understand when and how to enable AI

All AI features in MyNewClinic are **off by default**. To switch them on:

1. **Agree to AI data-processing** — Go to Settings > Security & 2FA. Read the summary of what data the AI sees (patient info, notes, outcomes). Check the box to confirm you understand. The **AI Assistant is included** in your subscription — there's no add-on to buy. (Optional extras like SCRPT clinical notes, RehabRx exercise programmes and the Alex AI Receptionist are the only paid add-ons.)

Once that's done: - The **Assistant** opens and works in the chat. - **Letters** can be generated from notes. - **Pre-visit summaries** generate on demand. - **Outcome insights** appear when you have 2+ readings. - **Grow** email drafts are ready to use. - **Dashboard briefing** appears automatically.

If a feature stays grayed out, check that AI data-processing is switched on in Settings > Security & 2FA. If you're the clinic owner, make sure your Anthropic API key is set up in Settings > Integrations.

Settings, your team & online booking

Set up your clinic's staff, roles, and availability; configure your online booking page; manage intake forms and security; and connect your AI Receptionist (Alex) to answer calls 24/7.

Invite staff with login access

Send an email invitation so someone can sign in with their own account and work in the clinic.

1. Go to **Staff** (from the main menu)
2. In the left panel, click **New staff member** at the bottom
3. Choose **Invite with login**
4. Enter their email address
5. Select their role: - **Receptionist**: books appointments, manages patients and invoicing (no settings or reports) - **Practitioner**: gets their own diary column, can treat patients and write notes - **Admin**: can manage settings, billing, and the team (but not billing ownership) - (Owner is not available; you can't give that role via invite)
6. Click **Send invitation**
7. Copy the link shown and share it with them — it's emailed automatically if email is configured

They'll accept the invite and set their own password to sign in.

Add a diary-only practitioner (no login)

Add someone to your diary and online booking page without giving them a login account — useful for contractors or guest practitioners.

1. Go to **Staff**
2. Click **New staff member**
3. Choose **Diary-only practitioner (no login)**
4. Fill in their first name, last name, and profession (optional)

5. Click **Create practitioner**

They'll appear in your diary and online booking, but have no access to the system. You can invite them later if needed — go to their Permissions tab and click **Invite by email**.

Edit a staff member's profile

Update a practitioner's name, credentials, photo, bio, disciplines, and settings.

1. Go to **Staff**
2. Click on the person's name in the left panel
3. Click **Edit profile** (top right)
4. Update any field: - Personal info (name, credentials, profession) - Photo (upload, replace, or remove) - Bio (shown on your online booking page) - Disciplines (which services they offer) - Calendar colour (for the diary view) - Online booking toggle (show/hide them on your booking page)
5. Click **Save changes**

Set a staff member's weekly hours

Define what days and hours someone works — this controls their availability for bookings.

1. Go to **Staff** → click on the person → **Hours** tab
2. Under **Weekly hours**, for each day: - Check the box to mark them working that day - Set start and end times (e.g. 09:00 to 17:00) - Leave unchecked to mark them as closed
3. Click **Save hours**

Block time off for a staff member

Mark specific days when someone is unavailable (holiday, training, etc.) — their diary slots won't be bookable.

1. Go to **Staff** → click on the person → **Hours** tab
2. Under **Time off**, enter: - **Date**: the first (or only) day they're off - **Until** (optional): the last day — set it to block a whole range, like a holiday week, in one go - **Times** (optional): leave empty to block whole days; set times to block part of the day. With a date range, the same times repeat every day — handy for a recurring school run or a clinic-share - **Reason** (optional): e.g. "Holiday" or "Training"
3. Click **Add time off** — a range is saved as one entry per day, so you can delete individual days later
4. To remove a blocked day, find it in the list below and click **Delete**

Set which services a practitioner offers

Control which appointment types each staff member can provide.

1. Go to **Staff** → click on the person → **Treatments** tab
2. You'll see all your appointment types listed
3. Toggle each service on or off: - **On** means they offer it - **Off** means they don't
4. Changes save automatically

Tip: If no services are toggled off, they offer everything. Once you toggle any off, they explicitly offer only those you've selected.

Change or view a staff member's role and permissions

Adjust what someone can do in the clinic — owner, admin, practitioner, or receptionist.

1. Go to **Staff** → click on the person → **Permissions** tab
2. Under **Role**, select their new role from the dropdown (owner only)
3. Read the descriptions to understand what each role can access: - **Receptionist**: diary, patients, invoicing (no settings) - **Practitioner**: their own diary, patients, notes - **Admin**: everything except billing ownership - **Owner**: full access including billing and team
4. Under **Status**, check or uncheck **Active** to activate/deactivate them - Inactive staff are hidden from the diary and online booking, but their history stays
5. If they don't have login yet, click **Invite by email** to send them one

Note: Only the account owner can change roles.

Remove a staff member

Revoke someone's access to the clinic.

1. Go to **Staff** → click on the person → **Permissions** tab
2. Scroll to **Danger zone**
3. Click **Remove from clinic**
4. Confirm in the popup

Their login is revoked immediately, but their diary, notes, and history stay in the clinic.

Set up your online booking page

Configure which services patients can book online and how cards are handled.

1. Go to **Settings** → **Online bookings**
2. You'll see your booking page URL — share this with patients
3. Under **Services available online**, ensure at least one appointment type has online booking enabled (go to **Settings** → **Appointment types** to enable it)
4. Under **Cards & no-show protection**, choose how you want to handle card information at booking: - **Don't ask for a card**: skip the card step entirely - **Ask for a card (optional)**: show the card field but let patients skip it - **Ask for a card (encouraged)**: show the card field with no skip button - **Require a card (hard hold)**: reserve the slot temporarily; if they don't add a card within 20 minutes, the slot releases
5. Set your **no-show / late cancellation fee** (as a percentage of the service price) — this is charged manually from the appointment panel when you mark a no-show
6. Click **Save**

Note: The hard hold feature needs Stripe API keys configured in Settings → API keys & webhooks.

Patients can create their own account (patient portal)

The **My account** button on your booking page is a full patient portal — upcoming appointments, invoices, receipts, rebooking and cancellation. Logging in is passwordless: the patient enters their email and receives a secure sign-in link. New patients can click **Create an account** and register themselves; returning patients are matched to their existing record by email, so duplicates are never created.

Your patient privacy notice is automatic

UK GDPR requires telling patients how their data is used at the point you collect it. Every clinic gets this out of the box: a privacy notice populated with your clinic's name and contact details is linked under the booking form and in the patient portal. It covers what's collected, the lawful basis, UK data storage, retention periods and patient rights. If you publish your own policy on your website, a custom link can be set for your clinic instead.

Create and manage intake forms

Set up forms patients fill before appointments (medical history, consent, etc.).

1. Go to **Settings** → **Intake forms**
2. Click **+ New form**
3. Enter a form name and optional description
4. Add fields by clicking **+ Add field** and choosing the type (text, checkbox, date, etc.)
5. Set which appointment types require this form (leave blank for all services)
6. Set validity (how often patients re-fill it, e.g. every 30 days)
7. Toggle **Auto-send on booking** to email the form to patients when they book
8. Click **Save**
9. Back on the intake forms list, toggle forms on/off and manage them with the status badges

Patients will see these forms on the booking page or in their account before their appointment.

Enable and configure two-factor authentication

Add a second security layer to your login using an authenticator app.

1. Go to **Settings** → **Security & 2FA**
2. Under **Two-factor authentication**, click **Set up two-factor**
3. Scan the QR code with an authenticator app (Google Authenticator, Authy, 1Password, etc.)
4. Or enter the key manually if you prefer
5. Enter the 6-digit code from your app and click **Turn on**
6. Two-factor is now active — you'll need your authenticator app to sign in

To turn it off: go back to **Settings** → **Security & 2FA** and click **Remove** next to your authenticator.

Enable AI data processing (for AI features)

Allow the AI Assistant to send patient data to Anthropic for smarter help.

1. Go to **Settings** → **Security & 2FA**

2. Under **AI features & patient data**, read the information
3. Click **Enable AI data processing**
4. Confirm you have an Anthropic data-processing agreement in place

Once enabled, the AI Assistant can use your patient data (names, notes) to provide smarter help. Turn it off anytime — patient data won't leave MyNewClinic while off.

Get a receptionist phone number for Alex (AI Receptionist)

Set up a phone number that Alex answers, books calls into your diary, and sends transcripts.

1. Go to **Settings** → **AI Receptionist**
2. If you don't have the add-on yet, click the link to add it from Billing
3. Once active, click **Get a receptionist number** to assign a number automatically
4. (Or click **Use a different number** to request another)
5. Copy the number and point your clinic phone or call forwarding to it

Alex is now listening on that number.

Configure Alex's greeting and hours

Customize what Alex says when answering and when to answer calls.

1. Go to **Settings** → **AI Receptionist**
2. Under **Greeting**, enter what Alex says when someone calls (e.g. "Good morning, thank you for calling [clinic]. This is Alex — how can I help?")
3. Under **Opening hours**, leave each day blank to use your team's working hours automatically (Alex reads them from your practitioners' schedules), or type specific hours to override a day (e.g. "9:00–17:00" or "Closed")
4. Under **Extra instructions**, add any guidance for Alex (optional): - New patients should book a longer first appointment - Mention free parking - Special handling for emergencies - etc.
5. Click **Save**

Discount codes on the phone: if a caller mentions a discount code, Alex checks it against the treatment they're booking and applies it automatically, the same as online booking. There's nothing to configure.

Turn Alex live and get call transcripts

Activate the AI Receptionist and receive transcripts by email.

1. Go to **Settings** → **AI Receptionist**
2. Under **Email call transcripts to**, enter an email address (e.g. reception@yourclinic.com)
3. Check **Alex is live** to turn on answering
4. Click **Save**
5. Calls are now booked into your diary and transcripts emailed

To turn off: uncheck **Alex is live** and click **Save**. Check **Recent calls** below to see and listen to call transcripts anytime.

Connect Treatwell — marketplace bookings import themselves

If you list on Treatwell, MyNewClinic mirrors it into your diary automatically: new Treatwell bookings appear within a minute, and Treatwell cancellations cancel themselves and offer the slot to your wait list.

Turn it on (once):

1. Go to **Settings → Integrations** and switch the **Treatwell** card on.
2. If your venue name on Treatwell differs from your clinic name in MyNewClinic, enter it in the venue name field on the card.
3. In **Treatwell Connect**, go to Settings → Notifications → *Contacting you* and add the inbox address shown on the card as an additional notification email address.

Stop double-bookings (per staff member):

1. On the **Staff** page, each practitioner has an **External calendar feed** card — copy the link.
2. In Treatwell Connect, open the team member → **External calendar** and paste it. Treatwell then blocks out times that are already busy in MyNewClinic. The feed shows busy/free only — no patient details leave the system.

What imports: the patient (matched by email and phone, or created new), the right practitioner and service, the duration, and the Treatwell order reference. If Treatwell hasn't taken payment, the appointment's note says so — collect after the session as usual. The card shows a running count of imported bookings and the latest activity.

Connect integrations and set up API keys

Let other tools (SCRPT, RehabRx, or your own integrations) access your clinic data.

1. Go to **Settings** → **API keys & webhooks**
2. Under **API keys**, click **Create key**
3. Enter a name (e.g. "AI Receptionist") and click **Create key**
4. Copy the key shown and store it safely — it won't be shown again
5. Share it with the tool that needs access

Your API key lets them read your calendar, create bookings, and sync appointments.

Set up webhooks for real-time updates

Notify other tools instantly when things change in your clinic (appointments, patients, invoices).

1. Go to **Settings** → **API keys & webhooks**
2. Under **Webhooks**, enter the endpoint URL (the URL where notifications should be sent)
3. Check which events to send: - appointment.created, appointment.updated, appointment.cancelled - patient.created - treatment_note.created - invoice.paid
4. Click **Add webhook**
5. The webhook is now active — you can toggle it off, view delivery history, or delete it anytime

Note: You'll get a signing secret to verify notifications came from MyNewClinic.