

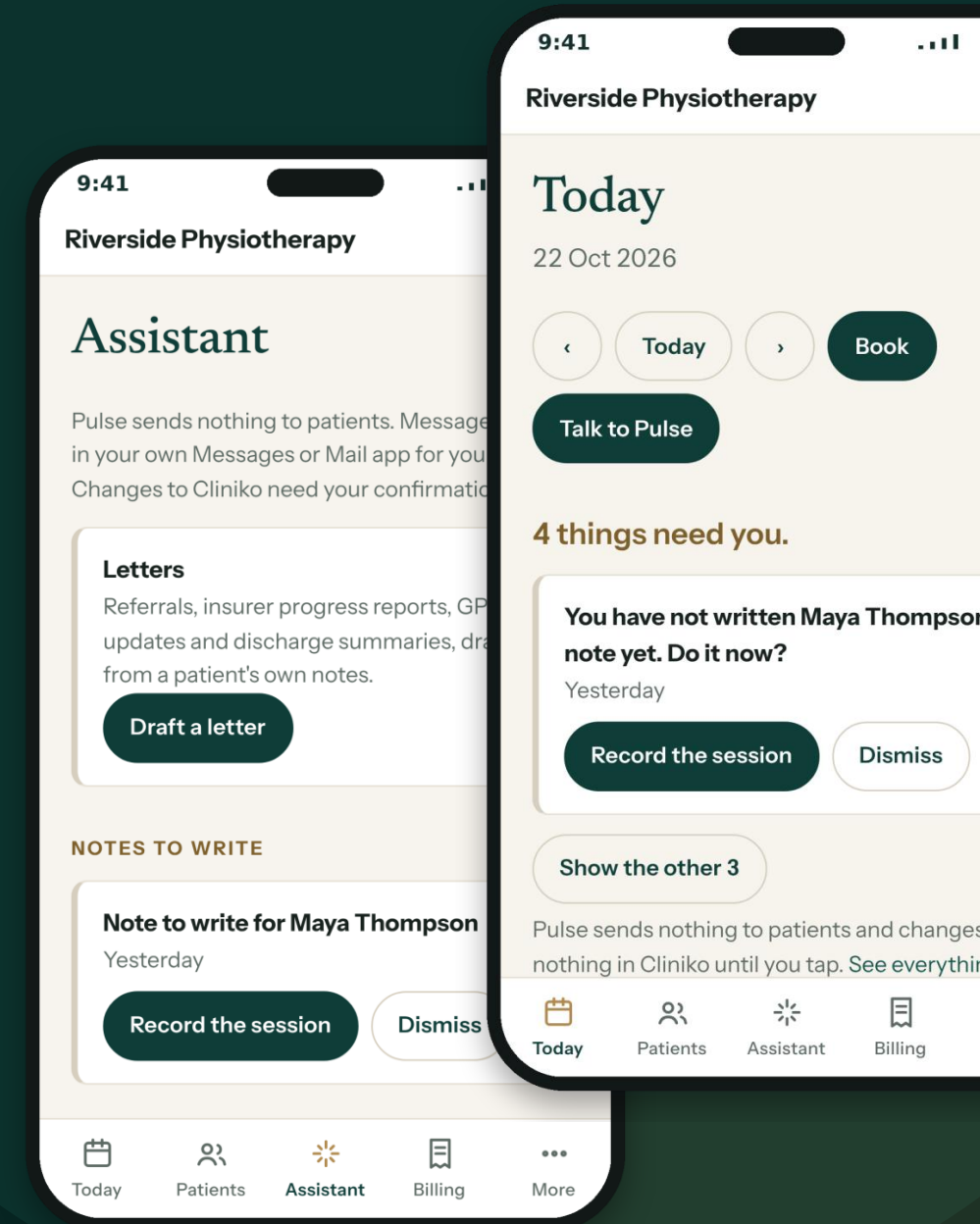
THE COMPLETE GUIDE

# Pulse

*Your clinic, in your pocket.*

Every feature, every screen, every tap. Explained simply, so you can get the very best from your day.

Antara Innovations



# A calmer day starts here

Pulse sits on top of your Cliniko account and quietly does the admin around it. It reads your diary, watches for what needs you, and puts the next step one tap away. This guide walks you through every part of it.



## Your diary, prepared

Every patient, every alert, every loose end, ready before they walk in.



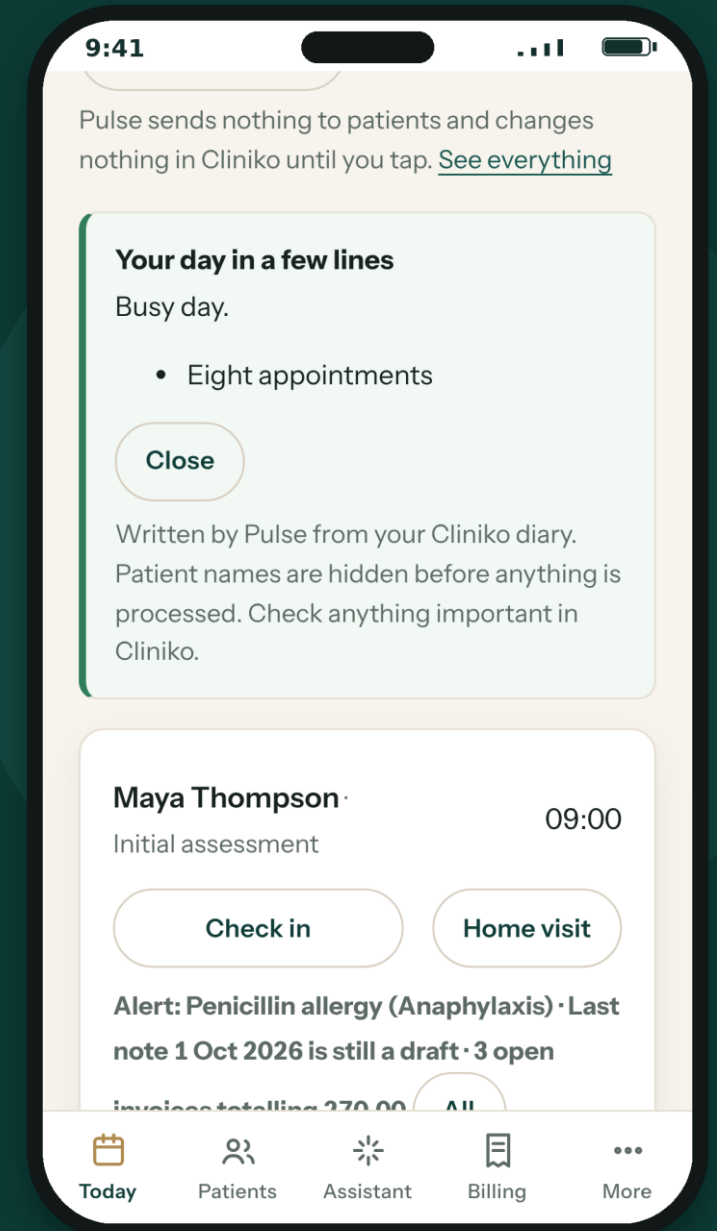
## Notes from your voice

Talk through the session. Pulse drafts the note. You check it and save.



## Things you would have missed

Missed appointments, free slots, recalls, unpaid invoices. Found for you.



# How this guide works

Each feature gets its own page, and every page answers the same three questions.



## What it is

A plain description of what the feature does for you, and why it is worth using.



## Where to find it

The exact tab and button, shown in the gold FIND IT tag at the top of the page.



## How to use it

Numbered steps, in the order you tap them, with the real words you will see on screen.

# Five tabs. Everything within reach.

The bar along the bottom of Pulse is your home base. It is always there, on every screen.



## Today

Your diary, your brief, check-in, booking by voice.



## Patients

Search, open any record, add or edit a patient.



## Assistant

What Pulse has noticed, with the next step prepared.



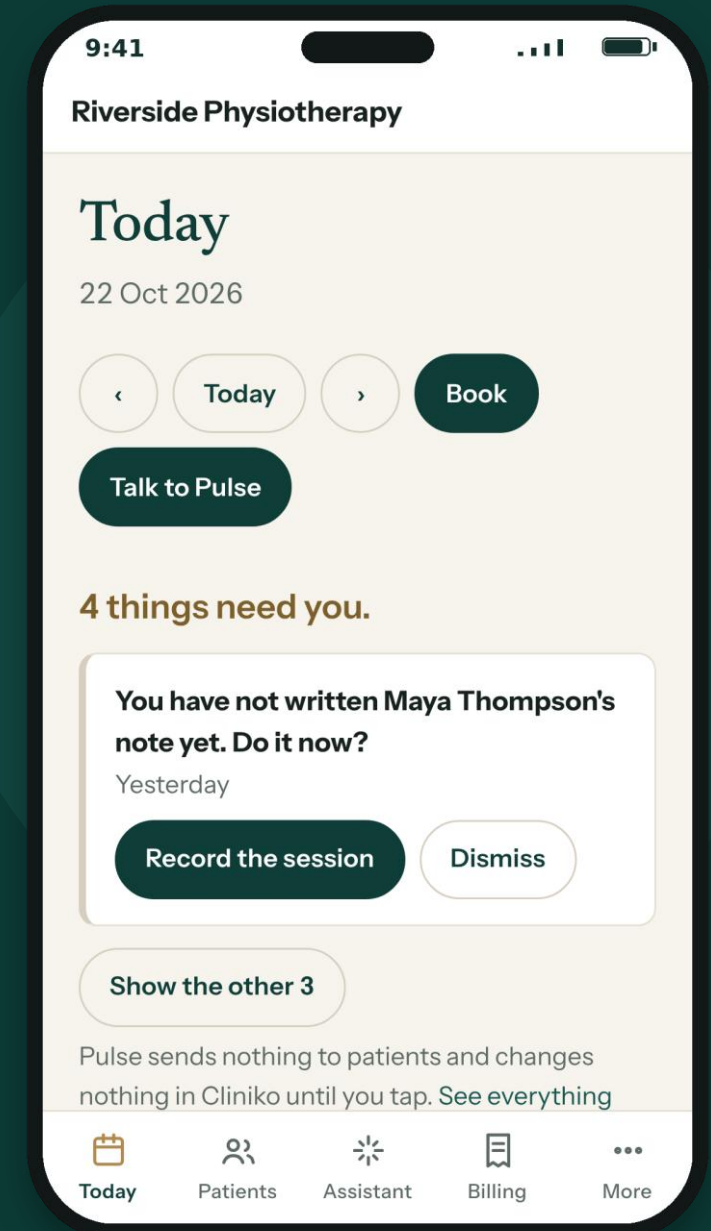
## Billing

Who owes you, oldest first, and what may not be invoiced.



## More

Scribe, your week, settings, calendar, everything else.



# Three promises built into every screen

Pulse is designed so you stay in charge. These three things are always true.



## Your records stay in Cliniko

Pulse reads Cliniko live every time you look. It keeps no copy of your patient records.



## Nothing goes to a patient on its own

Every text, email and letter is shown to you first and opens in your own Messages or Mail app. You press send.



## Every change takes two taps

First a review step, then a confirm step that spells out what will happen. Nothing reaches Cliniko before the second tap.

# 01

## Getting started

Sign in, connect Cliniko and you are ready. Setup takes a few minutes, once.



### IN THIS PART

- Sign in with a code
- Create your account
- Connect Cliniko
- Your subscription
- Face ID and app lock

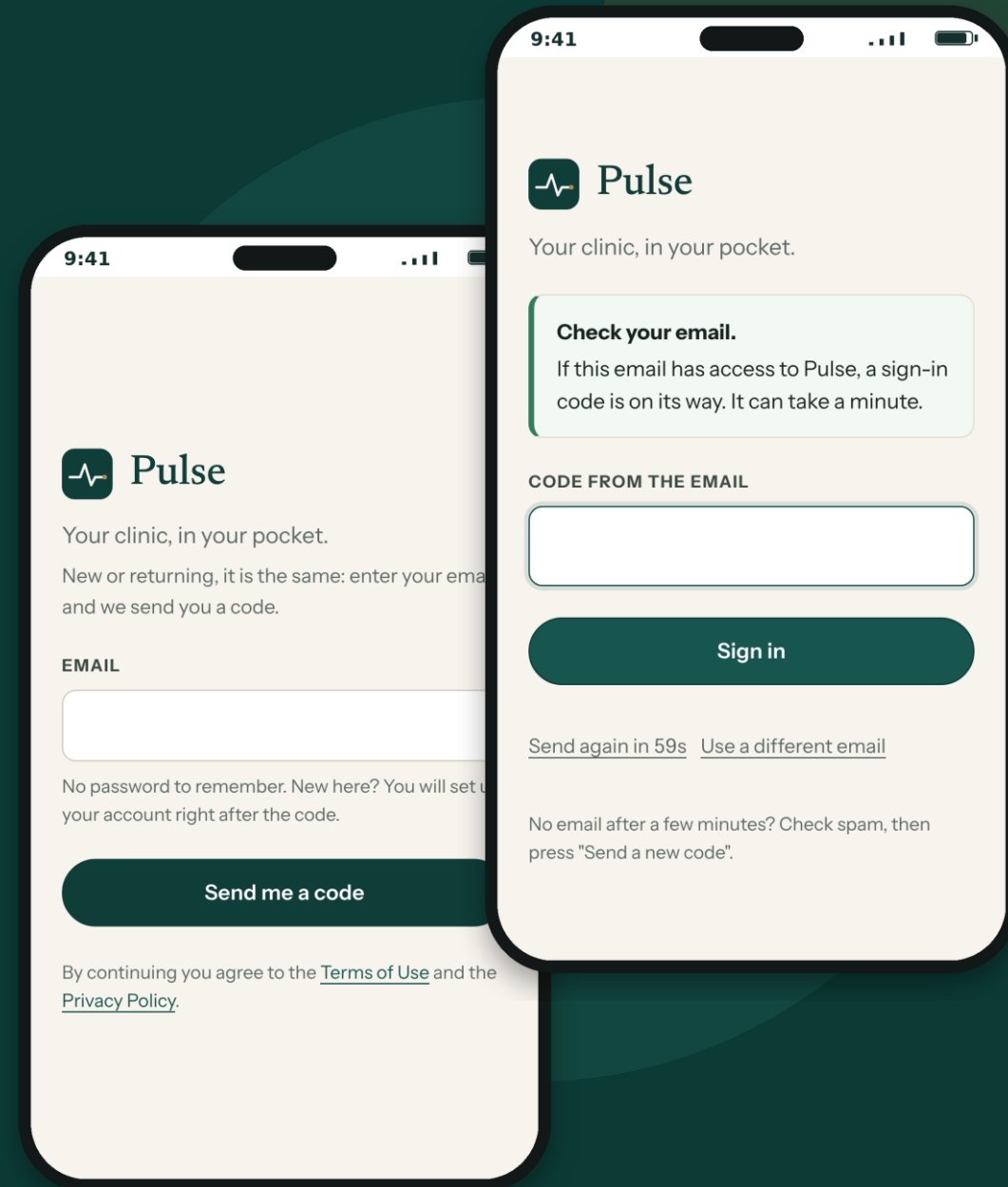
# Sign in with a code. No password.

New or returning, it is the same. Enter your email and Pulse sends you a code. There is nothing to remember and nothing to forget.

## FIND IT The first screen when you open Pulse

- 1 Type your address in Email and tap "Send me a code".
- 2 Open the email and type the numbers into "Code from the email". Spaces are fine.
- 3 Tap "Sign in". You are in.
- 4 No email yet? Wait a minute, then tap "Send a new code". Check your spam folder too.

**Good to know** A wrong or old code simply asks you for a new one, so a stray email can never get anyone in.



# Create your account in a minute

The first time you sign in with a new email, Pulse asks two small things so it can greet you properly and record your agreement.

**FIND IT** Appears once, right after your first code

- 1 Type "Your name". It is how Pulse will greet you each morning.
- 2 Tick the box to confirm Pulse is an assistant for clinic admin. It gives no clinical advice, and you stay responsible for your records and patients.
- 3 Tap "Create my account".

**Good to know** You can change your name later under More, then Account and settings.



**One name. One tick.  
Done.**

Your Terms of Use and Privacy Policy are linked right there before you agree.

# Connect your Cliniko

Pulse works with the Cliniko account you already use. You give it a key once, and it reads your diary, patients, notes and invoices straight from Cliniko.

**FIND IT** The only screen until Cliniko is connected

- 1 In Cliniko, open your name at the top right, then "My info".
- 2 Scroll to "Manage API keys" and choose "Add API key". Copy the key.
- 3 In Pulse, paste it into "Cliniko API key".
- 4 Tap "Connect". Pulse checks it with Cliniko and you are straight in.

**Good to know** Your key is stored encrypted. You can disconnect any time from More, and remove the key in Cliniko to cut it off everywhere.



## Your records never leave Cliniko.

Pulse reads them live. It does not keep a copy.

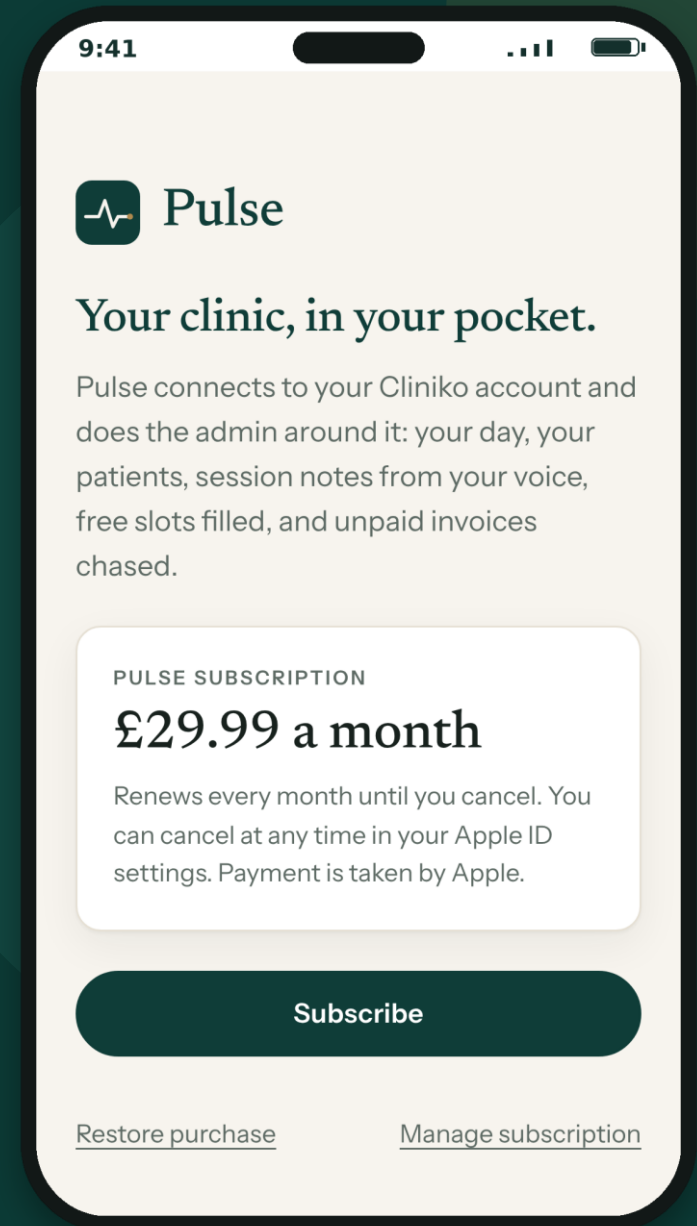
# Your subscription, made simple

Pulse is one simple monthly subscription, billed by the store you already use. Start with a free trial and see the difference for yourself.

**FIND IT** Appears on first sign in, and any time under **More, Subscription**

- 1 Read the Pulse subscription box. The price comes straight from your store.
- 2 Tap "Subscribe" and confirm with Face ID, fingerprint or your store password.
- 3 Already paid before? Tap "Restore purchase".
- 4 To change or cancel, tap "Manage subscription". It opens your store's own page.

**Peace of mind** Your records are never touched if a subscription ends. They stay in Cliniko, and everything is back the moment you subscribe again.



# Face ID keeps patients private

Pulse locks itself when you leave it for a minute or more, so a patient's details are never on show to a passer-by.

**FIND IT** Automatic, nothing to switch on

- 1 Leave Pulse for a minute or more and it locks.
- 2 Tap "Unlock" and use Face ID, your fingerprint or your phone passcode.
- 3 Prefer to leave? Tap "Sign out instead".

**Good to know** Pulse never sees your face or fingerprint. Your phone checks it and simply tells Pulse yes or no. If your phone has no screen lock, Pulse tells you how to set one up.



**Locked in a minute.  
Opened in a glance.**

Works with Face ID, fingerprint or your passcode.

# 02

## Today

The heart of Pulse. Your diary for the day, with everything you need to know already worked out.



### IN THIS PART

Your diary at a glance

What you may have missed

Your day in a few lines

Prep for every patient

Check in, home visits, move, cancel

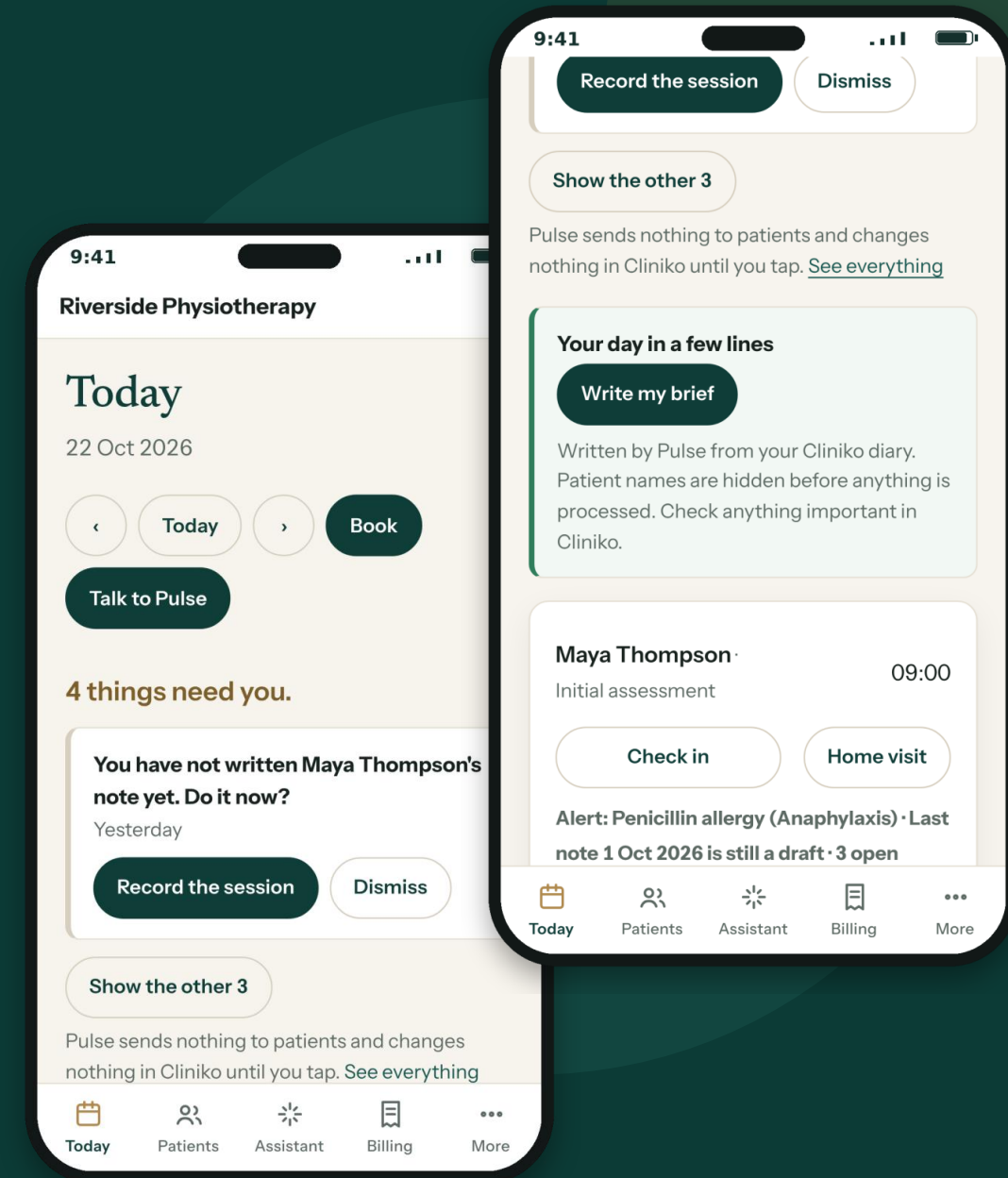
# Your diary, beautifully clear

Open Pulse and your day is waiting. One row per appointment, in time order, with the things that matter shown right on the row.

**FIND IT** Tab: Today (opens first)

- 1 Use the arrows beside the date to step to the previous or next day. Tap "Today" to jump back.
- 2 Tap a patient's name to open their full record.
- 3 Tap "Book" to book an appointment for the day you are viewing.
- 4 Tap "Talk to Pulse" to book or add something by voice.

**Good to know** A quiet day says so: "Nothing in the diary today". The first 100 appointments of a day are shown.



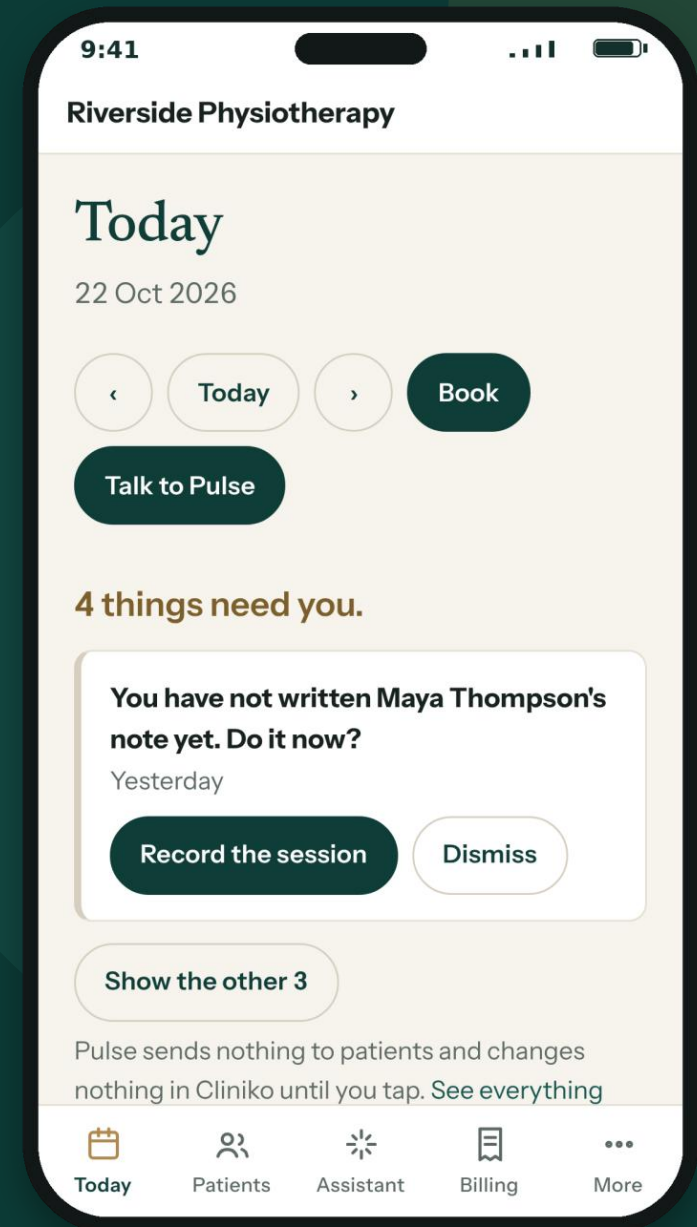
# What you may have missed

While you were busy treating, Pulse was watching. At the top of Today it tells you what needs you, by name, in order of importance.

## FIND IT Top of Today

- 1 Read the headline, for example "One thing needs you." or "Anna, you are all caught up."
- 2 Use the card's buttons: "Record the note", "Open in Messages", "Copy text" or "Dismiss".
- 3 Tap "Show the other" to see more, or "See everything" to open the Assistant.

**Good to know** Priority order: notes to write, missed appointments, recalls, free slots, patients gone quiet, then unpaid invoices. Pulse sends nothing to patients until you tap.



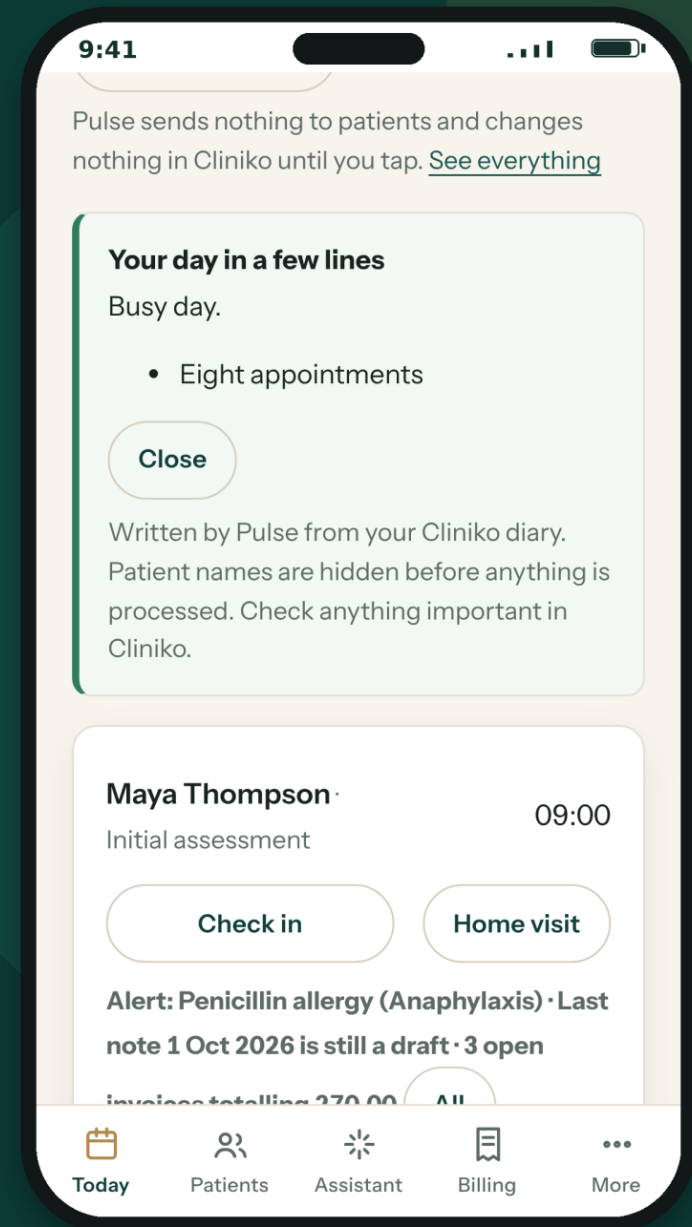
# Your day in a few lines

One tap and Pulse reads today's diary and writes you a short summary: who is coming, what is due and what is owed.

FIND IT Today, under the top block

- 1 Tap "Write my brief".
- 2 Read the short summary and its bullets.
- 3 Tap "Close" to clear it.

**Good to know** Patient names are replaced before anything is processed, then put back for you. If a summary cannot be written, you still get the plain counts of appointments, recalls and invoices.



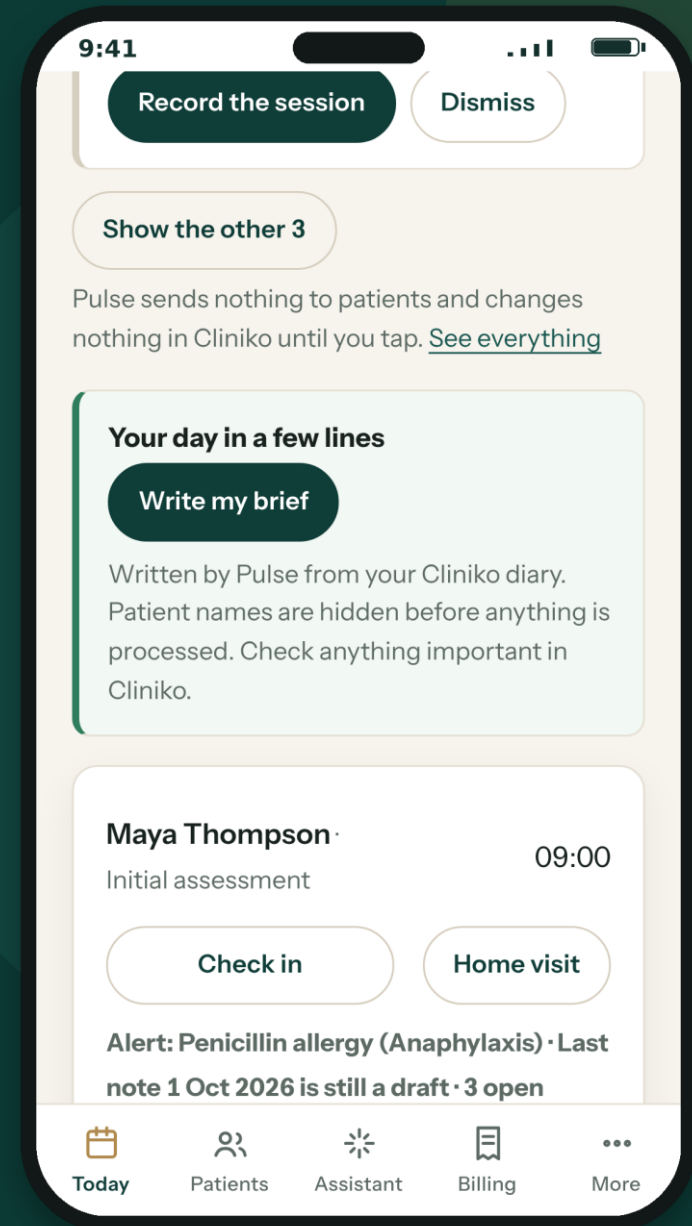
# Reading a diary row

Small coloured chips on each row tell the story at a glance, so you do not have to open anything to know what is ahead.

## FIND IT Every appointment on Today

- 1 "Alert: ..." shows a medical alert for that patient.
- 2 "Home visit" with "leave by" shows when to set off, and "Tight" warns when the gap to the last appointment is too short.
- 3 "Clashes with your own time" warns of a clash with something personal.
- 4 "Did not arrive" and "Here" show how you marked them.
- 5 "Your own time" and "Held in Pulse only" rows sit in the same list.

**Good to know** Each row also carries the buttons you need: Check in, Home visit, Prep, Move and Cancel.



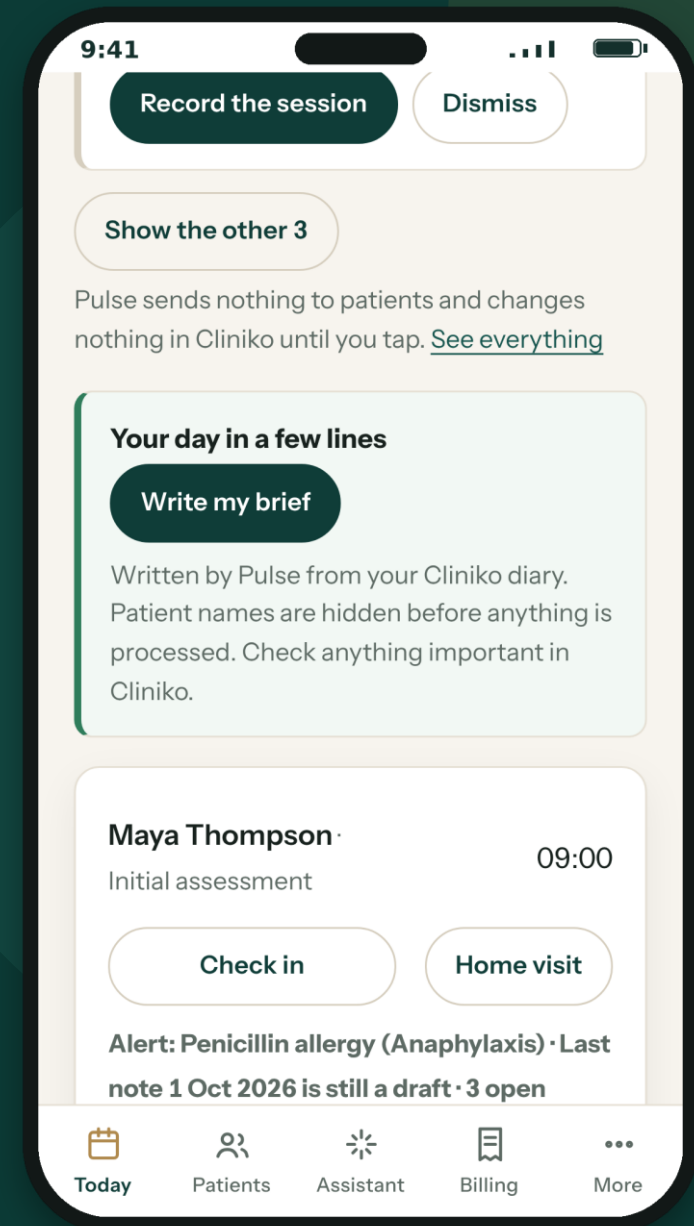
# Know them before they walk in

Under each appointment Pulse works out what you should know before you see that patient. It is calculated by the app itself, so it is quick and exact.

## FIND IT Under each appointment on Today

- 1 It is automatic for your first eight patients. You see one line: "Nothing flagged." or the alerts.
- 2 Tap "All" for the full list, titled "Before you see them". Tap "Less" to fold it away.
- 3 For any other patient, tap "Prep for this patient".

**Good to know** It can show medical alerts, last visit, unfinished notes, open invoices, overdue recalls and forms not completed. Switch the automatic version on or off under More, "Get my day ready".



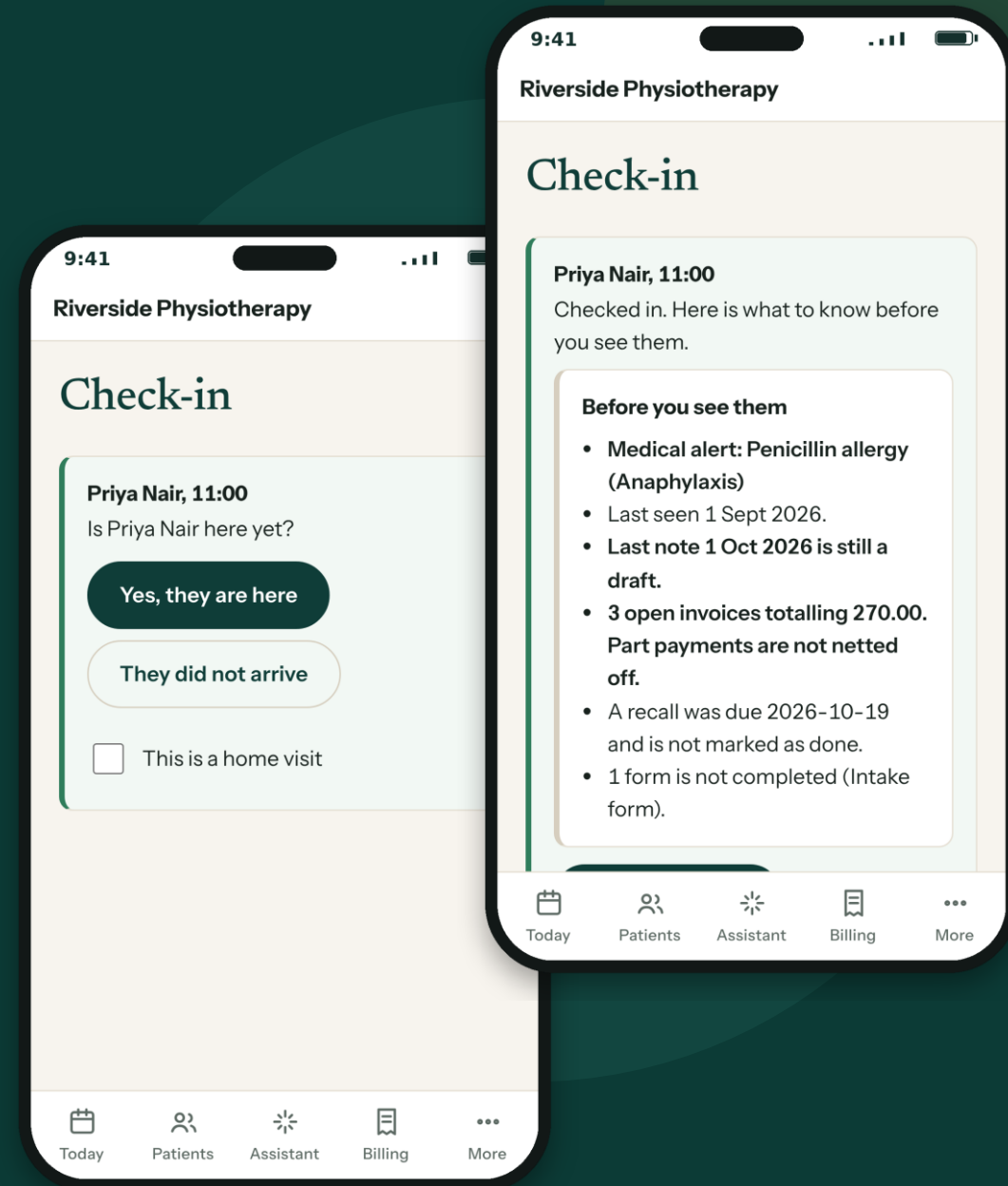
# Check in: one question, two taps

The moment a patient arrives, tell Pulse. It keeps your week honest and opens what you need for the session.

**FIND IT** The "Check in" button on a Today row, or tap the coming-up notification

- 1 Read "Is the patient here yet?".
- 2 Tap "Yes, they are here". The prep list opens by itself.
- 3 Or tap "They did not arrive". Pulse notes it for your week and your billing check.
- 4 After "here", tap "Record the session" or "Open patient". Made a mistake? Tap "Undo".

**Good to know** Pulse cannot set "did not arrive" inside Cliniko, so tick it there too if you want it on the official record.



# Home visits, planned for you

Pulse works out which appointments are home visits, how long the journey takes and when you must leave. It asks only when it cannot tell.

**FIND IT** Today rows, Check-in, and More, "Home visits"

- 1 On a Today row tap "Home visit" (it becomes "At the clinic" to switch back).
- 2 See "leave by" and a "Tight" warning if the gap before is too short.
- 3 On Check-in, tick "This is a home visit" for "Set off by" and your travel time.
- 4 Tap "Directions" or "Book a taxi" to open your own map and taxi apps.

**Good to know** Pulse learns where you usually see each patient and asks only once. Set a usual week and a usual travel time under More to ask even less.



**Leave by 09:40. Pulse  
already did the sums.**

Real drive times for home visits, and a warning  
when you are tight.

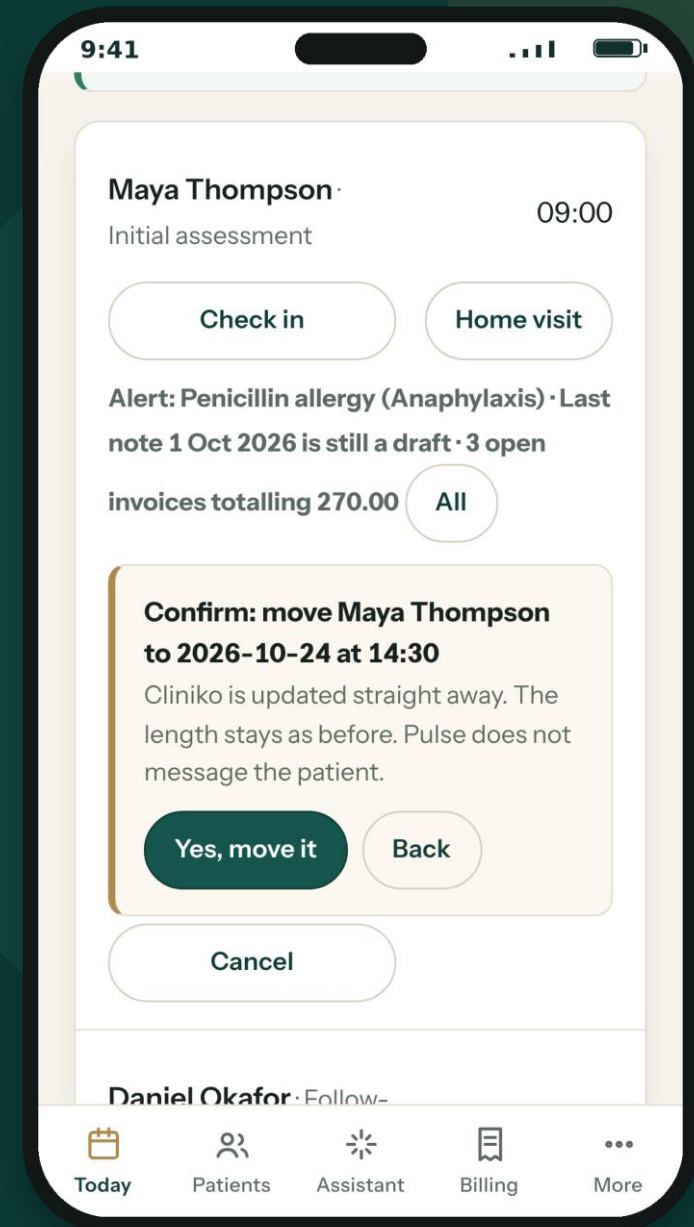
# Move an appointment

Change the time of an appointment in a few taps, with a plain confirmation before anything changes in Cliniko.

FIND IT The "Move" button on a Today row

- 1 Tap "Move".
- 2 Pick the new "Date" and "Time".
- 3 Tap "Review". Read the confirmation.
- 4 Tap "Yes, move it". Cliniko is updated straight away.

**Good to know** The length stays as before. Pulse does not message the patient, so let them know yourself.



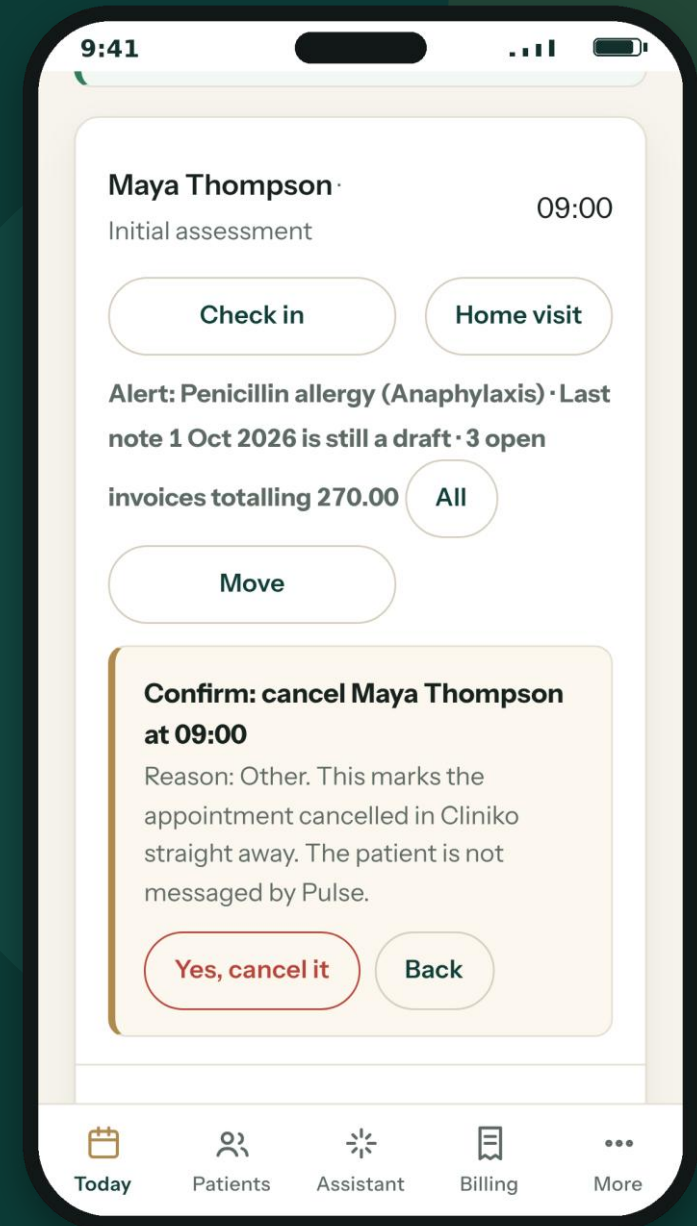
# Cancel an appointment

Cancel in Cliniko without leaving Pulse. You choose the reason, review it, and only then does it happen.

FIND IT The "Cancel" button on a Today row

- 1 Tap "Cancel".
- 2 Choose a reason: Feeling better, Condition worse, Sick, Away, Other or Work. Add a note if you like.
- 3 Tap "Review".
- 4 Tap "Yes, cancel it".

**Good to know** The freed slot can then appear in your Assistant as a free slot to offer to someone waiting. Pulse does not message the patient.



# Held in Pulse only

Sometimes you want a booking noted but not yet in Cliniko. Pulse can hold it for you and show it in your diary.

**FIND IT** A row marked "Held in Pulse only" on Today

- 1 Created when you choose "Keep in Pulse only" after Talk to Pulse.
- 2 Tap "Put in Cliniko" to open Book with everything filled in. Review and book.
- 3 Tap "Remove" to delete the held entry from Pulse.

**Good to know** After you put it in Cliniko, tap "Remove" on the held row so it does not show twice. Held entries also count in clash warnings.



## Noted now. Confirmed when you are ready.

A held booking sits in your diary and warns you of clashes.

# 03

## Booking

Book by tapping or by simply saying it. Either way, you confirm before anything is booked.



### IN THIS PART

Book an appointment

Talk to Pulse: say it, check it, tap it

Your own appointments and family

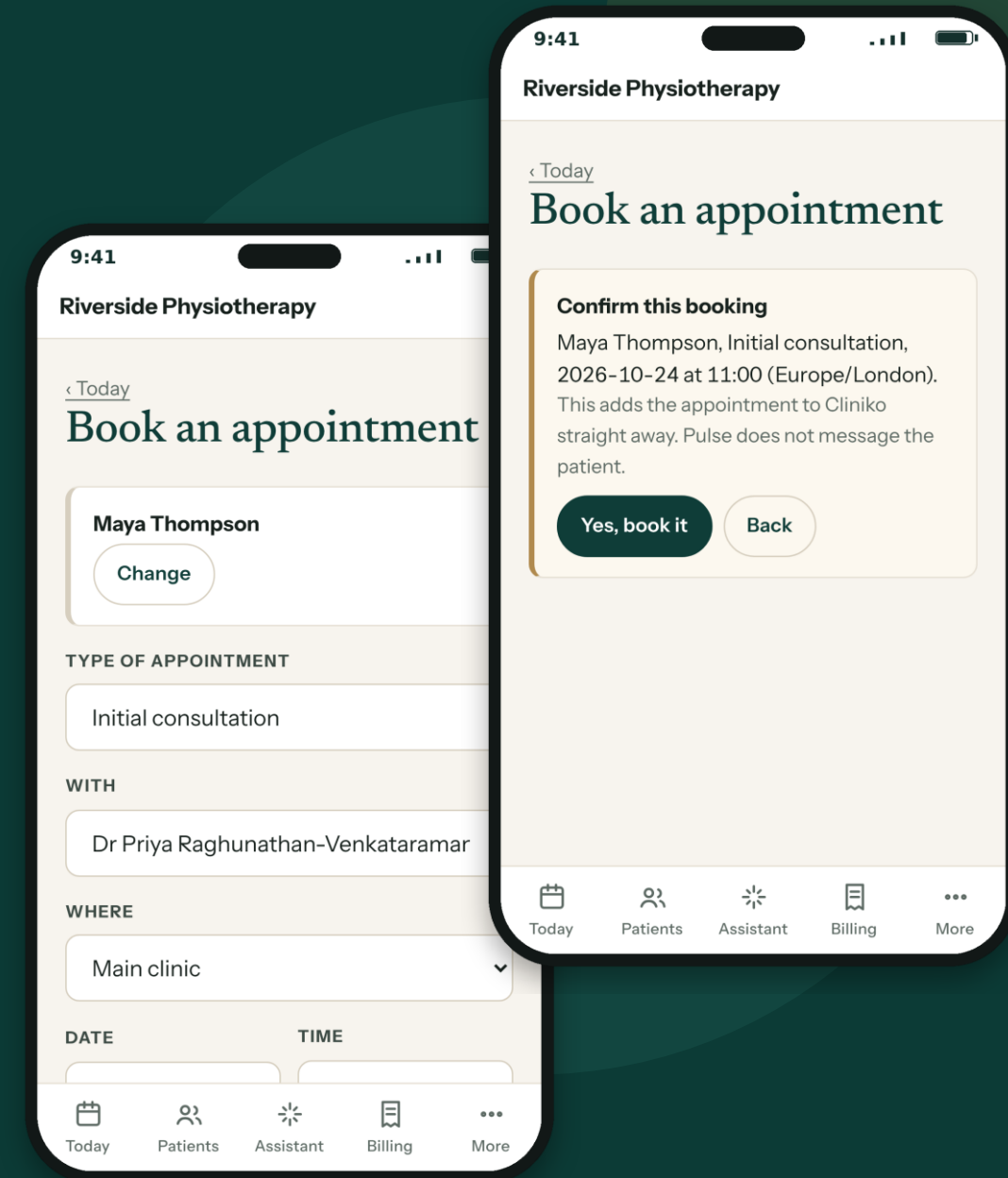
# Book an appointment

A clean, simple booking form that talks directly to Cliniko. It warns you of clashes before you commit.

**FIND IT** Today, "Book". Also from a patient page

- 1 Under "Find the patient" type a surname or first and last name, press Enter on the keyboard and tap the person.
- 2 Pick the "Type of appointment", then "With" for the practitioner, and "Where" if you have more than one business.
- 3 Set the "Date" and "Time", and add notes if you wish.
- 4 Tap "Review", check the summary, then tap "Yes, book it".

**Good to know** If something clashes, Pulse says so and lets you choose "Book it anyway". It compares your Cliniko diary, your own time, held bookings and, if you switch it on, your phone calendar.



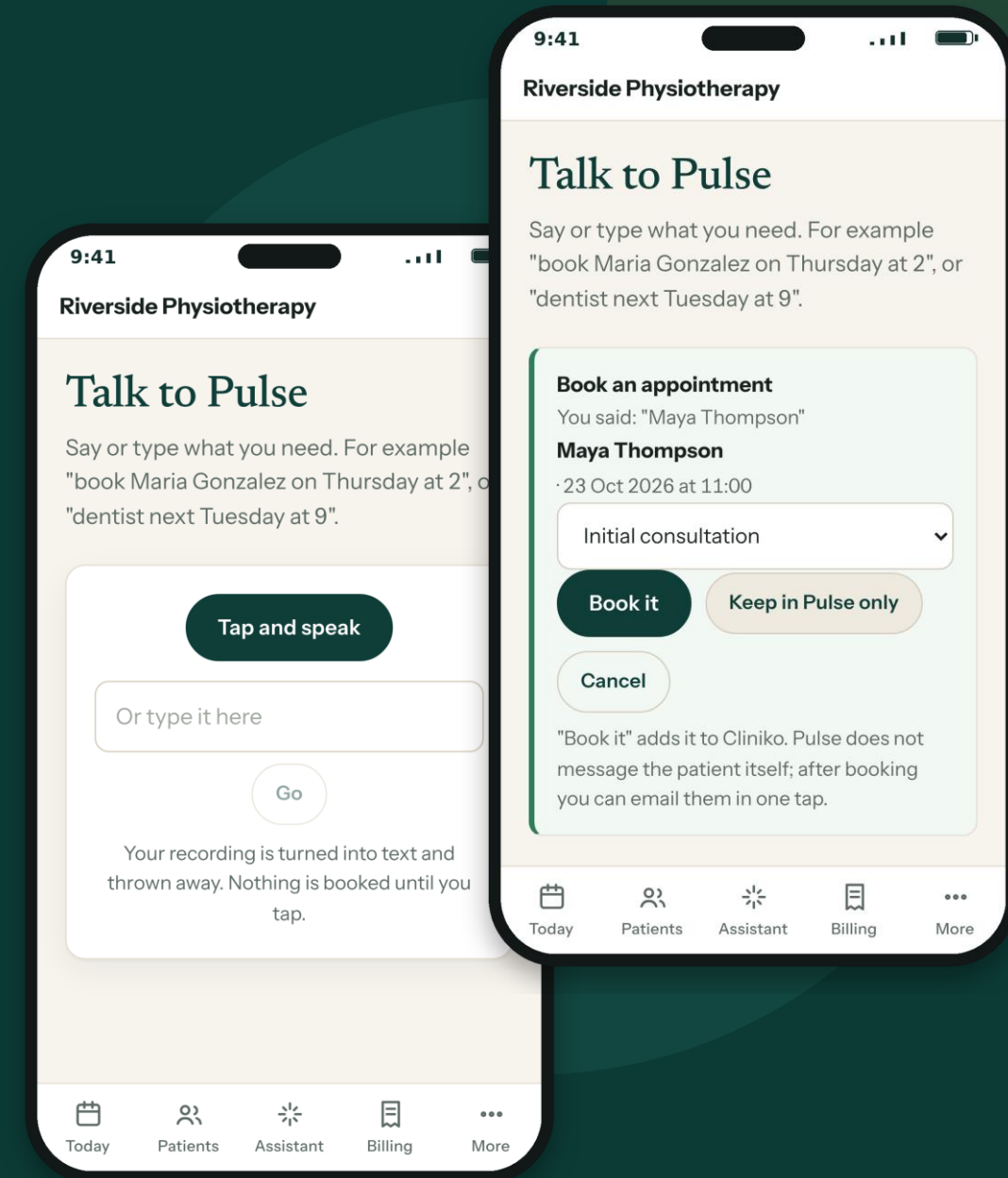
# Talk to Pulse

Say what you need, or type it. Pulse turns "book Maria Gonzalez on Thursday at 2" into a ready booking and waits for your tap.

**FIND IT** Today, "Talk to Pulse". Also More, "Talk to Pulse"

- 1 Tap "Tap and speak", allow the microphone, say it and tap "Stop". Or type it and tap "Go".
- 2 More than one match? Tap the right person under "Which one?".
- 3 Check the type of appointment, the time and any clash warning.
- 4 Tap "Book it" for Cliniko, "Keep in Pulse only", or "Cancel".
- 5 Afterwards, tap "Email the details" for a ready message in your own Mail app.

**Good to know** Your voice is turned into text and thrown away. Nothing is booked until you tap. Say something personal, such as "dentist next Tuesday at 9", and it goes into your own time instead.



# 04

## Patients

Every patient at your fingertips, with the full picture one tap away.



### IN THIS PART

Search and browse

The patient page and its tabs

Add or edit a patient

Set a recall

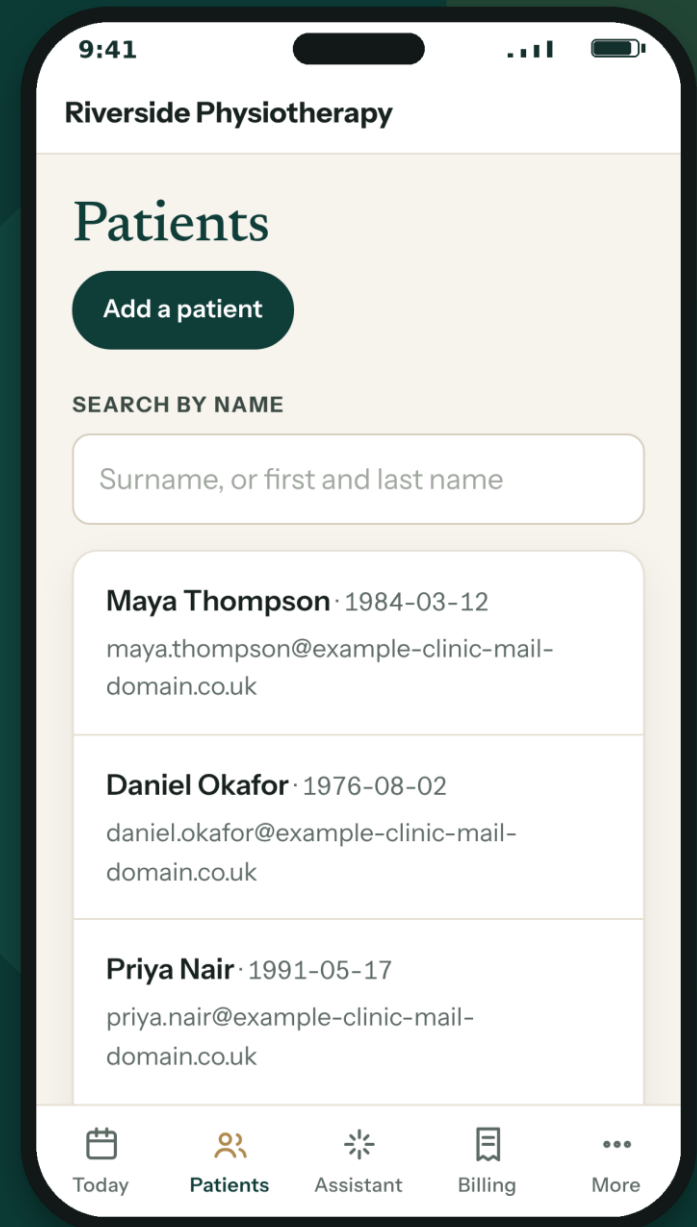
# Find anyone in seconds

All your patients, sorted by surname, with a search that understands names the way you say them.

FIND IT **Tab: Patients**

- 1 Type in "Search by name" and press Enter on the keyboard.
- 2 One word matches a surname or a first name. Two words match first and last name.
- 3 Tap a row. You see name, date of birth and email.
- 4 Tap "Add a patient" at the top for someone new.

**Good to know** The first 50 are shown. When there are more, Pulse says so and suggests searching to narrow it down.



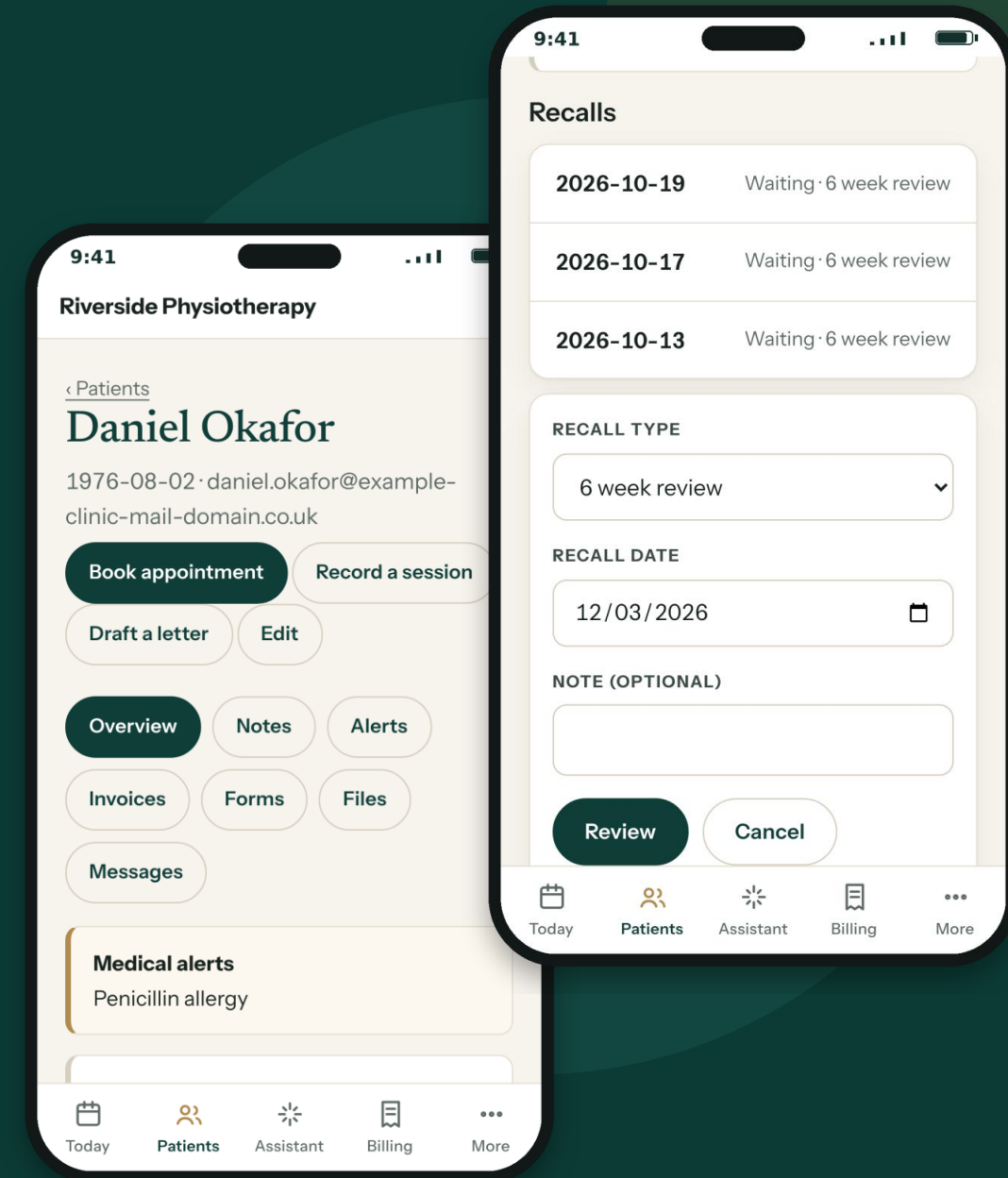
# The patient page

Everything about one person, read live from Cliniko. Four quick buttons at the top and seven tabs beneath.

**FIND IT** Tap any patient, from anywhere in Pulse

- 1 Buttons: "Book appointment", "Record a session", "Draft a letter" and "Edit".
- 2 Tabs: Overview, Notes, Alerts, Invoices, Forms, Files and Messages.
- 3 Overview shows medical alerts, patient notes, recalls and recent appointments.
- 4 Tap "Set a recall" to schedule a call back.

**Good to know** Tap "Patients" at the top left to go back to the list.



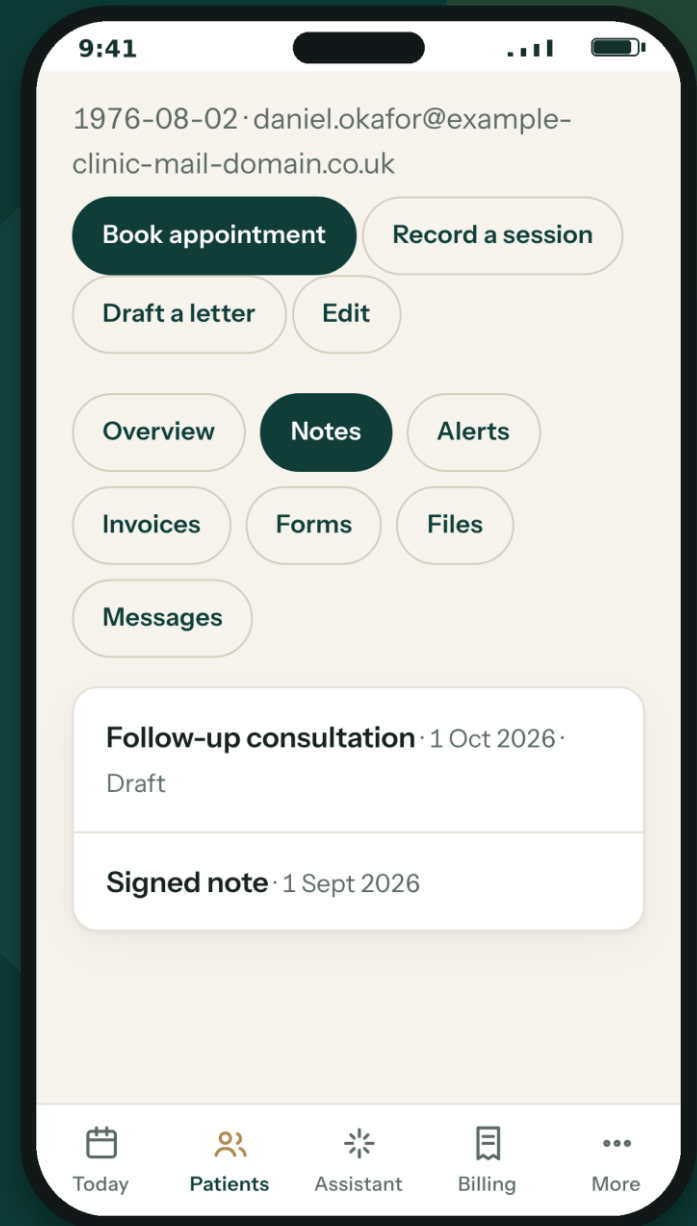
# Treatment notes, read and finished

Read any note, and edit your drafts, without leaving Pulse.

FIND IT Patient page, tab "Notes"

- 1 Tap a note to open it. Tap again to close it.
- 2 On a draft, tap "Edit this draft" and change the text boxes.
- 3 Tap "Review", then "Save draft in Cliniko".

**Good to know** Pulse always keeps a note as a draft. You finish and sign it in Cliniko, because only you should sign your clinical notes. Signed notes are read only.



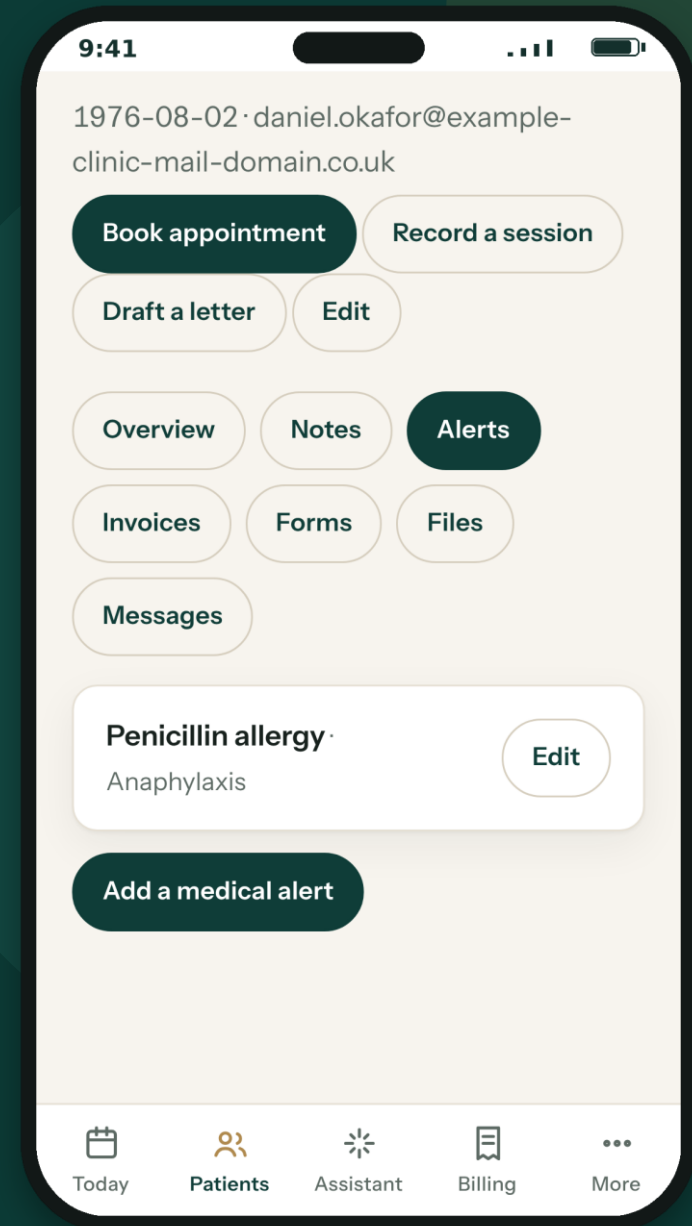
# Medical alerts

The things you must never forget, one tap from the patient. Add or change them as you learn more.

**FIND IT** Patient page, tab "Alerts"

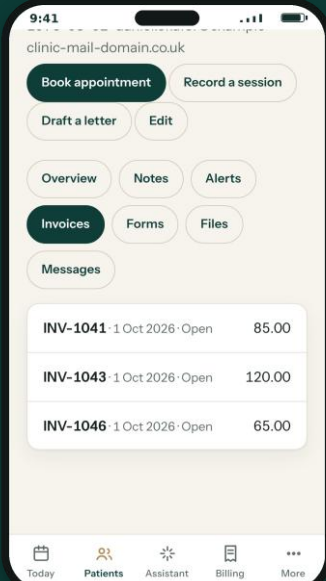
- 1 Read the list: the alert name and its details.
- 2 Tap "Edit" beside one, or "Add a medical alert".
- 3 Fill in "Alert" and "Details".
- 4 Tap "Review", then "Save in Cliniko".

**Good to know** Alerts also appear as a chip on the patient's row in Today, and in their prep before the appointment.



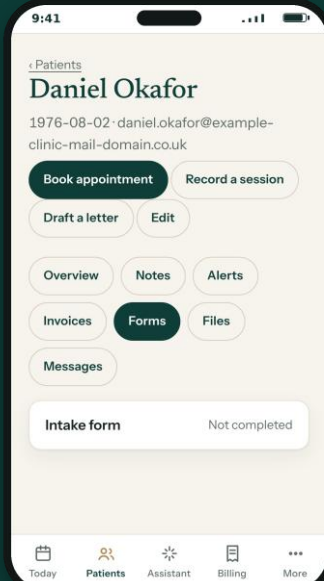
# Invoices, forms, files and messages

Four more tabs give you the rest of the picture. All four are read only, so you can browse with confidence.



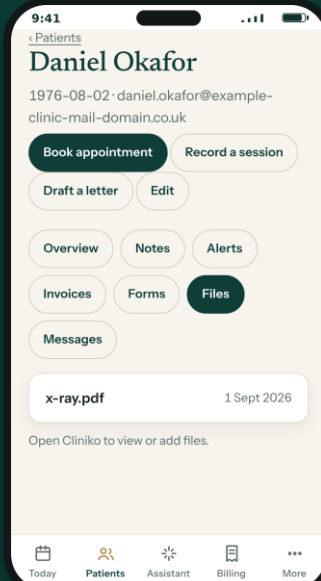
## Invoices

Number, date, status and total. Open, Paid, Closed or Open credit. Newest 20.



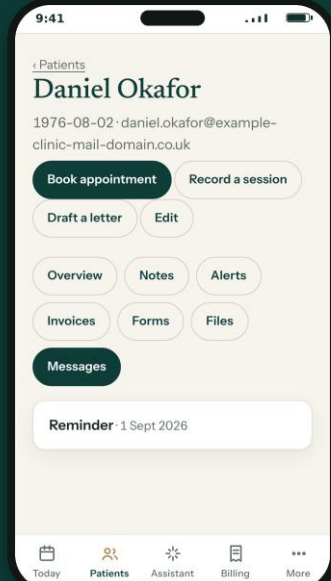
## Forms

Each form with "Done" and its date, or "Not completed".



## Files

A list of what is attached. Open Cliniko to view or add files.



## Messages

The emails and texts recorded in Cliniko, with subject and date.

# Add or edit a patient

Create a new patient in Cliniko, or update one, from the same simple form.

**FIND IT** Patients, "Add a patient". Or a patient page, "Edit"

- 1 Fill in the name, date of birth, contact details, address and emergency contact. First and last name are needed.
- 2 Tick or untick "Send appointment confirmation emails" and "Do not send marketing texts".
- 3 Tap "Review" (or "Review changes" when editing).
- 4 Tap "Add to Cliniko" or "Save changes in Cliniko".

**Good to know** When you edit, only the fields you changed are sent. The review button stays off until you change something.

The screenshot shows a mobile app interface for 'Riverside Physiotherapy'. At the top, the status bar shows 9:41, signal strength, and battery level. Below the header, there is a '< Back' link and the title 'Add a patient'. The form consists of several input fields arranged in a grid:

- FIRST NAME** and **LAST NAME** (two input fields)
- PREFERRED NAME** and **TITLE** (two input fields)
- DATE OF BIRTH** (input field with a date picker icon) and **OCCUPATION** (input field)
- EMAIL** and **MOBILE** (two input fields)
- ADDRESS** (one input field)

At the bottom, there is a navigation bar with five icons and labels: 'Today' (calendar icon), 'Patients' (person icon), 'Assistant' (sun icon), 'Billing' (document icon), and 'More' (three dots icon).

# Set a recall

Never lose track of a patient who should come back. Set the recall in Cliniko while you are still looking at them.

**FIND IT** Patient page, Overview, "Set a recall"

- 1 Tap "Set a recall".
- 2 Pick the "Recall type". The date starts six weeks from today.
- 3 Add a note if you want one.
- 4 Tap "Review", then "Set recall in Cliniko".

**Good to know** Mark a recall as done from its Assistant card when you have been in touch.

9:41

### Recalls

|            |                         |
|------------|-------------------------|
| 2026-10-19 | Waiting · 6 week review |
| 2026-10-17 | Waiting · 6 week review |
| 2026-10-13 | Waiting · 6 week review |

**RECALL TYPE**

6 week review

**RECALL DATE**

12/03/2026

**NOTE (OPTIONAL)**

Review Cancel

Today Patients Assistant Billing More

# 05

## Session scribe

Talk through the session. Pulse listens, drafts the note in your own template, and waits for your approval.



### IN THIS PART

Record to draft in five steps

Checking the draft

Finish the visit

Scribe sessions and packs

# From voice to note in five steps

It is your voice, your template and your final say. Pulse does the typing.

1

Side Physiotherapy

Session scribe

Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.

PATIENT

Maya Thompson

Choose someone else

NOTE TEMPLATE

Plain session note (Subjective, Objective, Examination, Assessment, Plan)

Pulse fills the free-text questions only. Tick boxes and dates stay for you.

☐ The patient knows this session is being recorded and has agreed. The audio is turned into text and is not kept.

14 scribe sessions left. A session is one note

Today

Patients

Assistant

Billing

More

Choose

Pick the patient and your note template. Tick that the patient agreed to the recording.

2

Side Physiotherapy

Session scribe

Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.

RECORDING

00:03

Keep Pulse open and the screen on while you record.

Stop and write up

Today

Patients

Assistant

Billing

More

Record

Tap "Start recording" and talk through the session as you normally would.

3

Side Physiotherapy

Session scribe

Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.

WHAT WAS SAID

Patient reports lower back pain for three weeks. On examination reduced flexion. Plan exercises and review in two weeks.

Fix anything that was heard wrongly. The note is written from this text.

Write the note

Copy text

Today

Patients

Assistant

Billing

More

Read the text

Your words appear as text. Fix anything heard wrongly.

4

Side Physiotherapy

Session scribe

Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.

Check every answer.

Each one shows the words it came from. Anything the recording did not cover is empty. Nothing is saved until you confirm.

SUBJECTIVE

WHAT DOES THE PATIENT REPORT?

Lower back pain for three weeks.

What this came from

Today

Patients

Assistant

Billing

More

Check the note

Pulse writes the note. Every answer shows the words it came from.

5

Side Physiotherapy

Session scribe

Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.

Saved as a draft in Cliniko

Open the patient in Cliniko to read it, finish it and sign it. The recording was not kept.

Finish the visit

You said you will see Maya Thompson again in 2 weeks.

Around Thu, 5 Nov. You said: "review in two weeks"

Book that visit

Or set a recall instead

Today

Patients

Assistant

Billing

More

Save as draft

It goes to Cliniko as a draft. You finish and sign it there.

Pulse | The complete guide

35

# Setting up a recording

Choose who and how, give the consent tick, and you are ready. The recording is turned into text and thrown away.

**FIND IT** More, "Session scribe". Or "Record a session" on a patient

- 1 Under "Patient", type a name, tap "Find" and tap the person.
- 2 Pick your "Note template": a plain session note or any of your own Cliniko templates.
- 3 Tick that the patient knows the session is being recorded and has agreed.
- 4 Tap "Start recording" and keep Pulse open with the screen on.

**Good to know** The audio is not kept. Pulse fills only the free-text questions in your template. Tick boxes and dates stay for you.

The screenshot shows the 'Session scribe' interface within the Riverside Physiotherapy app. At the top, the status bar shows 9:41, signal strength, and battery level. The app header is 'Riverside Physiotherapy'. The main title is 'Session scribe'. Below it, a description reads: 'Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.' The 'PATIENT' section has a search bar with 'Maya Thompson' entered and a link 'Choose someone else'. The 'NOTE TEMPLATE' section has a dropdown menu set to 'Plain session note (Subjective, Objecti'. Below this, a note explains: 'Pulse fills the free-text questions only. Tick boxes and dates stay for you.' There is a checkbox for 'The patient knows this session is being recorded and has agreed. The audio is turned into text and is not kept.' At the bottom of the form, it says '14 scribe sessions left. A session is one note'. The bottom navigation bar includes icons for 'Today', 'Patients', 'Assistant', 'Billing', and 'More'.

9:41

Riverside Physiotherapy

## Session scribe

Record, and Pulse drafts the note. You read it, change it, and save it to Cliniko as a draft.

**PATIENT**

Maya Thompson

[Choose someone else](#)

**NOTE TEMPLATE**

Plain session note (Subjective, Objecti

Pulse fills the free-text questions only. Tick boxes and dates stay for you.

☐ The patient knows this session is being recorded and has agreed. The audio is turned into text and is not kept.

14 scribe sessions left. A session is one note

Today Patients Assistant Billing More

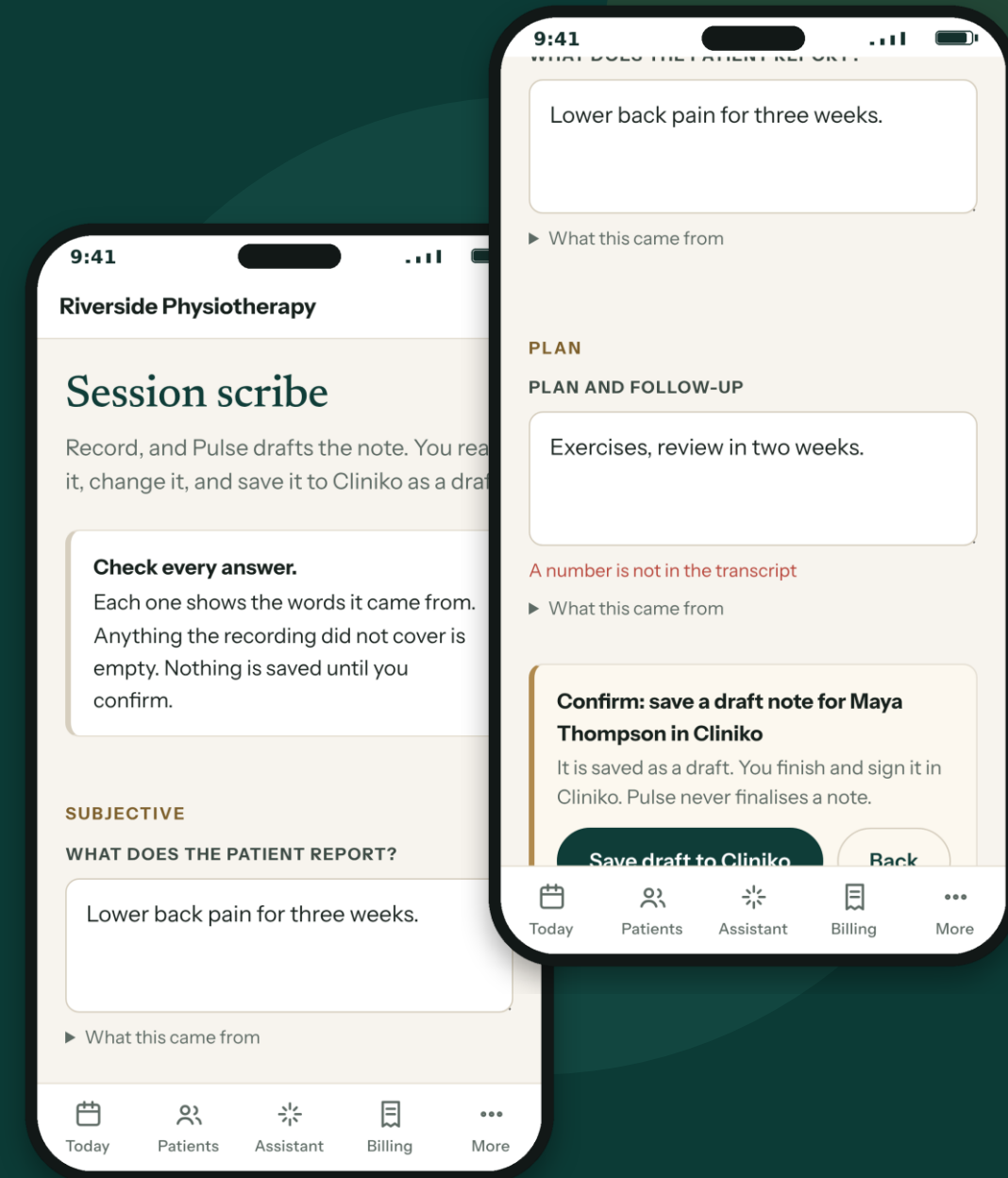
# Check every answer

This is where Pulse earns your trust. Each answer comes with the exact words it was taken from, and anything uncovered is left empty.

**FIND IT** Session scribe, after "Write the note"

- 1 Read each answer. They are all editable text boxes.
- 2 Tap "What this came from" to see the exact quotes behind an answer.
- 3 A red line under a box is a warning, for example a number that is not in the recording.
- 4 Tap "Review and save", then "Save draft to Cliniko".

**Good to know** Nothing is saved until you confirm, and Pulse never finalises a note. It learns your style from the edits you make, so each note needs less changing.



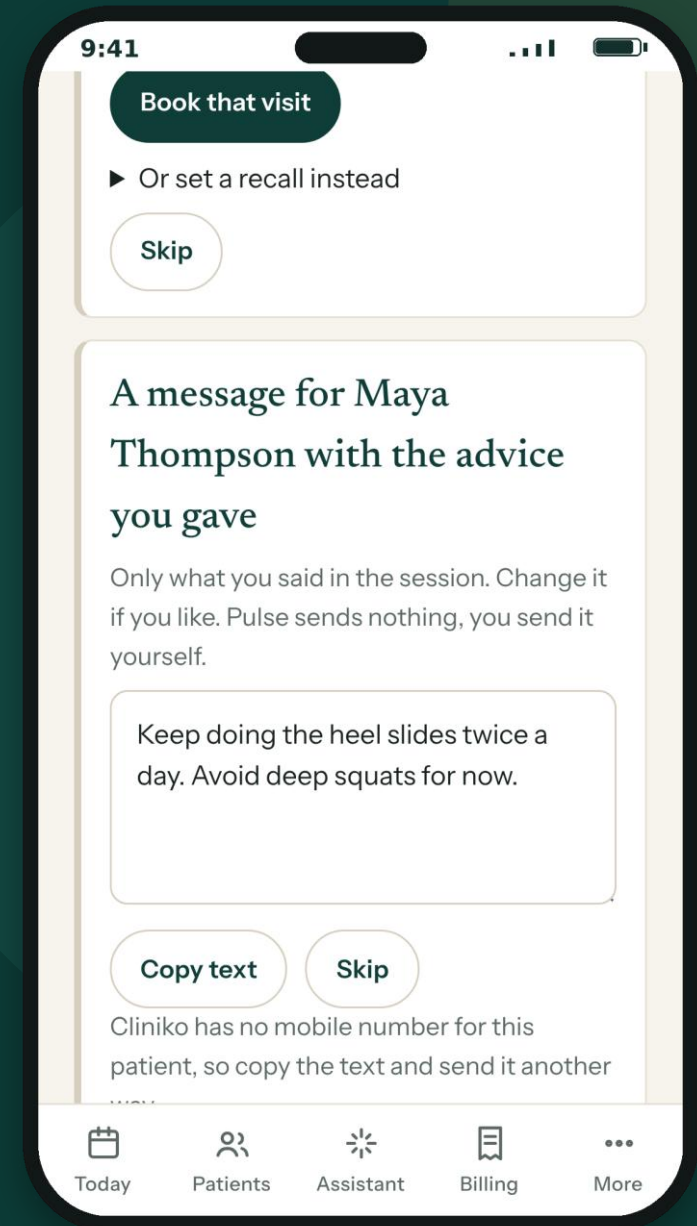
# Finish the visit

The note is saved. Now Pulse reads what you said at the end of the session and offers the jobs that usually get forgotten.

**FIND IT** Appears under "Saved as a draft in Cliniko"

- 1 Return visit: "Book that visit" or set a recall instead.
- 2 Advice for the patient: edit the message, then "Open in Messages" or "Copy text".
- 3 Medical alert: "Review the alert", then "Add the alert".
- 4 Letter: "Draft the letter" opens Letters with the patient filled in.

**Good to know** Only things you actually said appear, each with your own words. If nothing came up it says "All done". Nothing happens until you tap.



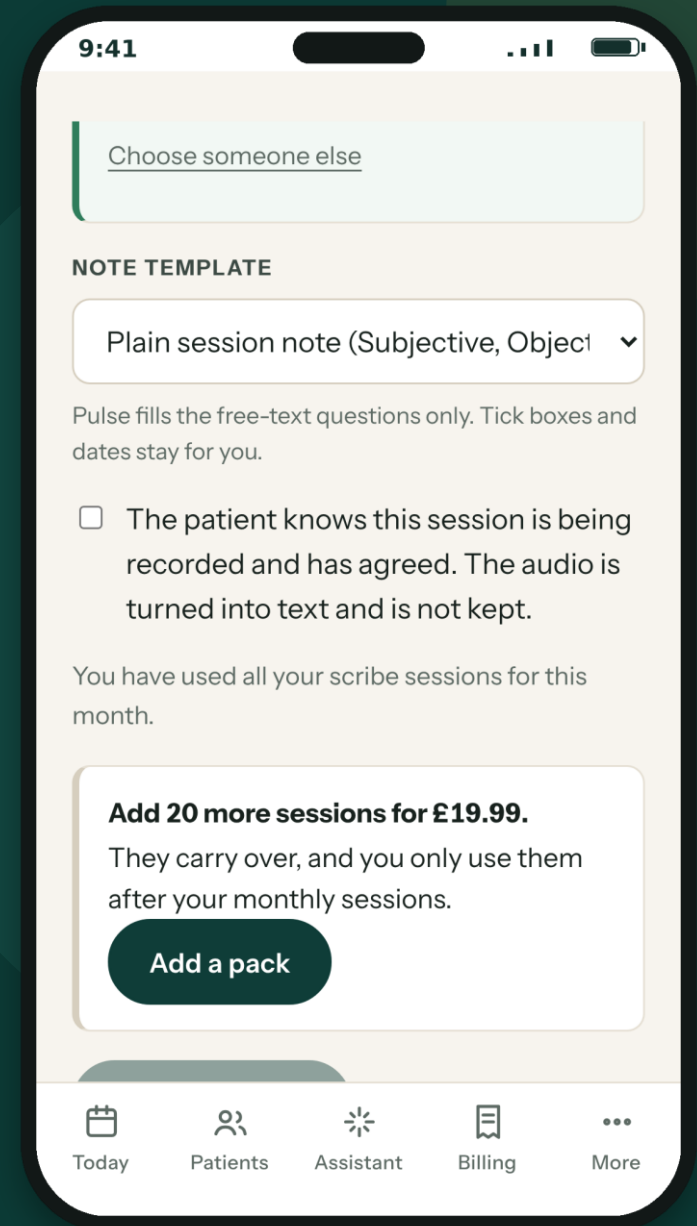
# Scribe sessions and extra packs

A scribe session is one note written from a recording. Your plan includes a monthly allowance, and you can top up any time.

## FIND IT Session scribe, on the setup screen

- 1 Read how many scribe sessions you have left this month.
- 2 Used them all? You will see a box offering a pack of more sessions.
- 3 Tap "Add a pack" and the store takes payment.
- 4 Extra sessions carry over, and are used only after your monthly ones.

**Good to know** Booking by voice and letters do not use a scribe session. Your monthly sessions come back next month.



# 06

## Letters

Referrals, reports, updates and discharge summaries, drafted from your own notes in moments.



### IN THIS PART

Four kinds of letter

Drafted only from what you wrote

# Letters in moments

Pick a patient and a kind of letter. Pulse drafts it from that patient's own recent notes. You read it, change it and send it yourself.

**FIND IT** Assistant, "Draft a letter". Also on a patient page and the Billing payer

- 1 Find a patient, or arrive with one already chosen.
- 2 Pick the "Kind of letter".
- 3 Add "Who is it to" and anything extra you want included.
- 4 Tap "Write the letter", edit it, then tap "Copy letter" and paste it where you like.

**Good to know** Each paragraph is backed by a word-for-word quote from your notes. If the notes did not say it, it is left out, and numbers that are not in your notes are flagged in red.

9:41

Riverside Physiotherapy

## Letters

Pulse drafts a letter from this patient's own recent notes. You read it, change it and send it yourself. Nothing is saved or sent.

**PATIENT**

Surname, or first and last name **Find**

**KIND OF LETTER**

Referral to another professional ▼

**WHO IS IT TO (OPTIONAL)**

For example Dr Patel

**ANYTHING TO ADD (OPTIONAL)**

For example: the reason for the referral, if it is not in the notes

Today Patients Assistant Billing More

# Four letters, ready when you are

Each has its own structure, so it reads like something you wrote.



## Referral

Reason for referral. History and findings. Treatment so far. What is asked.



## Insurer report

Presenting problem. Treatment to date. Progress. Further treatment.



## GP update

Reason for attending. Findings. Treatment and advice. Follow up.



## Discharge summary

Reason for care. Course of care. Outcome. Advice going forward.

# 07

## Assistant and Ask

Pulse keeps watch so you do not have to. Ask it anything about your clinic, and let it bring you what matters.



### IN THIS PART

What the Assistant notices

The six kinds of card

Sending messages the safe way

Ask about your diary and patients

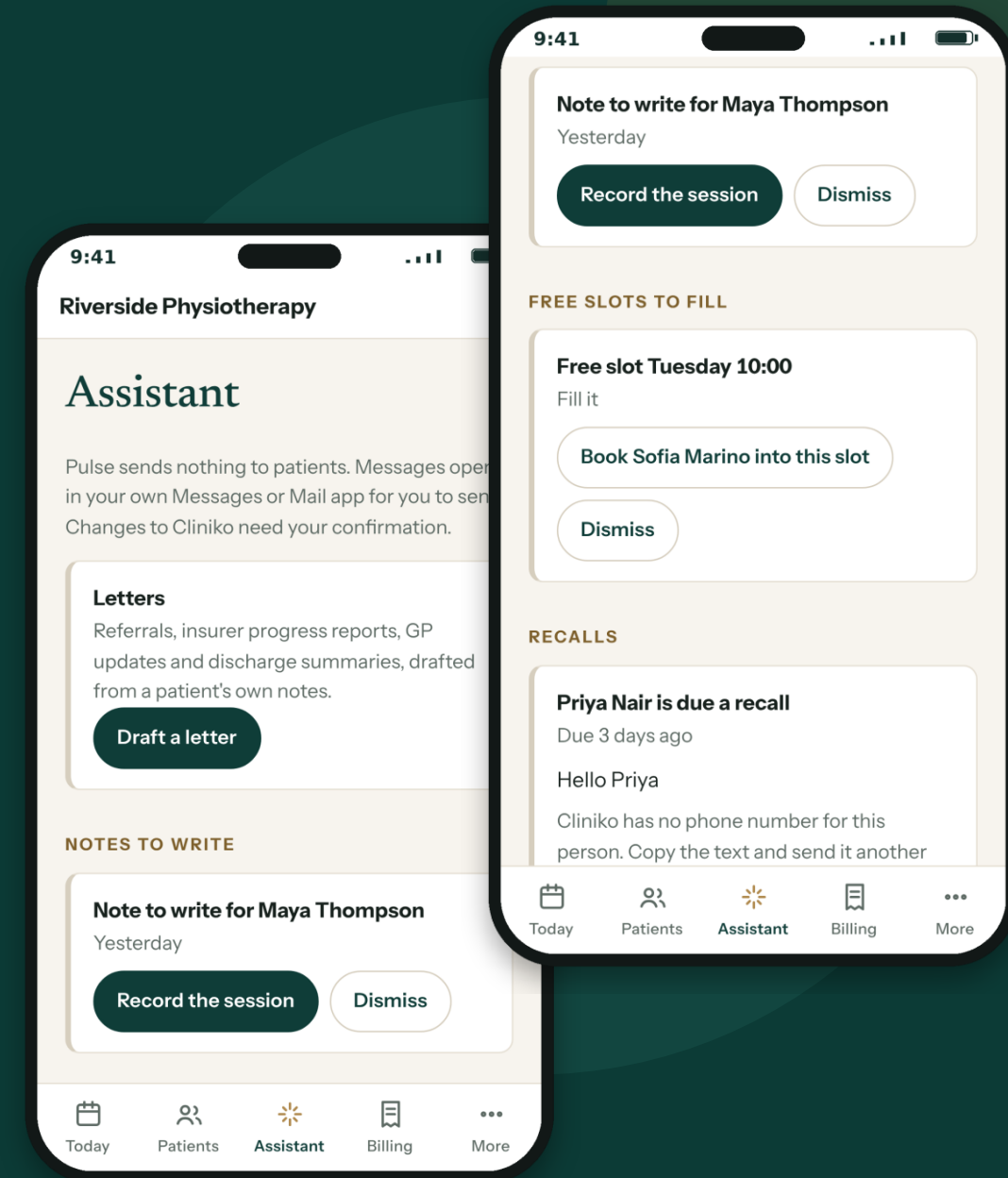
# Your clinic, watched for you

The Assistant gathers everything that needs attention into one calm list, and prepares the next step for each item.

## FIND IT Tab: Assistant

- 1 Read the groups in order: Notes to write, Missed appointments, Free slots to fill, Recalls, Gone quiet, Unpaid invoices.
- 2 Use the buttons on each card to act on it.
- 3 Tap "Draft a letter" in the Letters box at the top.
- 4 Nothing to do? It says "Nothing needs you right now". Silence is the point.

**Good to know** Tap "Dismiss" to hide a card for now. Pulse sends nothing to patients, and changes to Cliniko always need your confirmation.



# Six kinds of card



## Notes to write

Sessions from the last two days with no finished note. "Record the note" opens the scribe for that patient.



## Missed appointments

Patients who did not arrive or cancelled late and have not rebooked. A ready message offers another time.



## Free slots to fill

A cancelled slot in the next seven days, offered to people with a recall due. A ready message does the asking.



## Recalls

People due a call back. Send the message, then tap "Mark this recall as done".



## Gone quiet

Regular patients not seen for three weeks with nothing booked. A friendly check-in, and a one-tap recall.



## Unpaid invoices

Invoices open for two weeks or more, oldest first, with a polite reminder ready to send.

# Messages that open in your own app

Every card comes with a message already written in a warm, careful tone. It never mentions treatment or health, and it names your clinic.

**FIND IT** Any Assistant card, and the top of Today

- 1 Tap "Open in Messages" or "Open in Mail". Your own app opens with the message filled in.
- 2 Read it, change it if you like, and press send yourself.
- 3 No number or email on file? Tap "Copy text" and send it another way.
- 4 Cliniko changes ask "Confirm" first, then you tap again.

**Good to know** Because the message leaves from your own phone, it comes from you. Pulse never sends anything to a patient by itself.



## You press send. Always.

Text if they have a mobile, email if they do not.

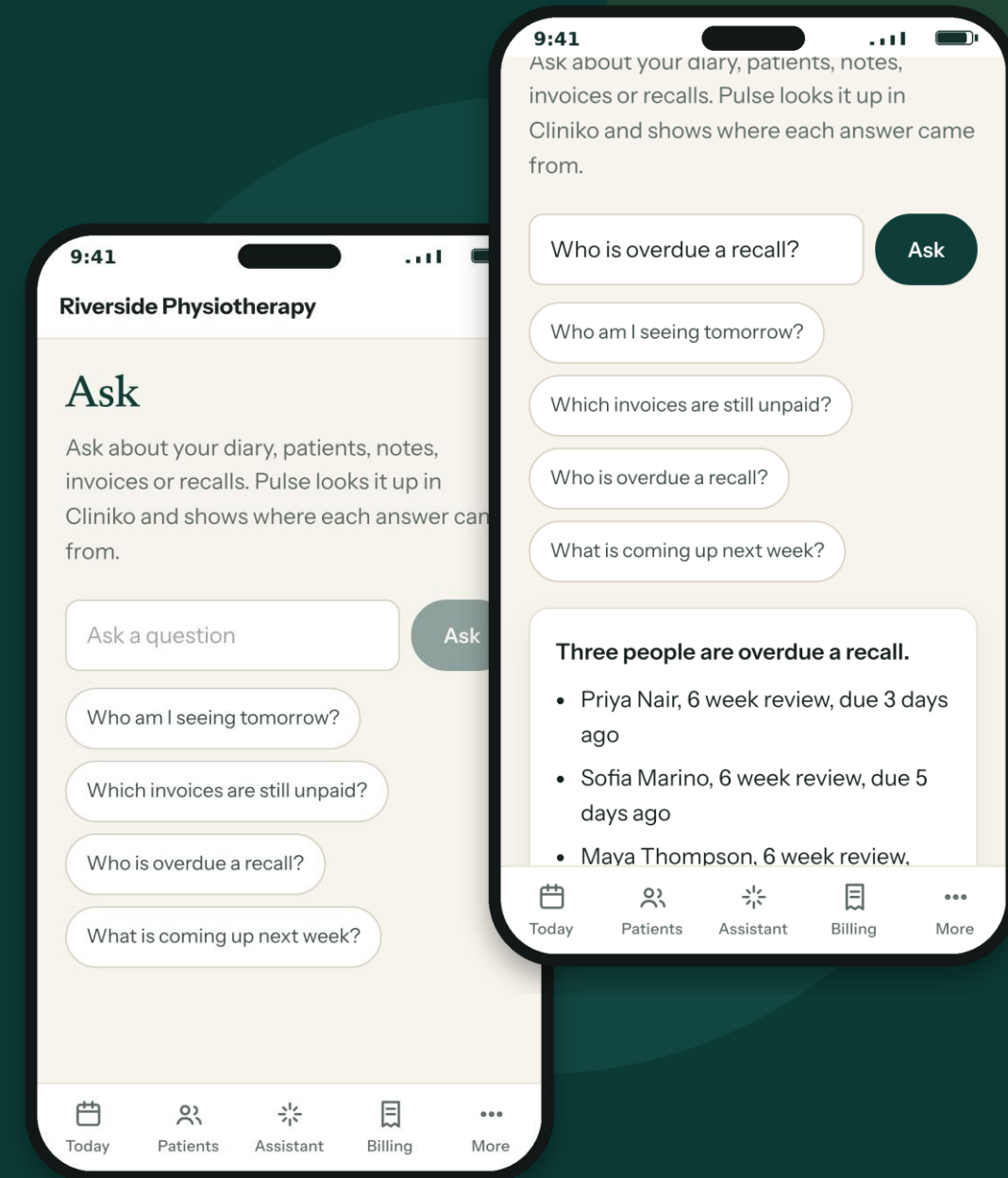
# Ask anything about your clinic

Type a question in plain words. Pulse looks it up in Cliniko, answers, and shows exactly where each answer came from.

FIND IT More, "Ask"

- 1 Type your question, or tap a ready-made one such as "Who am I seeing tomorrow?".
- 2 Tap "Ask".
- 3 Read the bold summary and the bullets beneath.
- 4 Open "What this is based on" to see the records behind the answer.

**Good to know** Ask can look at appointments, patients, open invoices and recalls. It is read only, and always says "Pulse can make mistakes. Check anything important in Cliniko."



# 08

## Billing, recalls and your week

See who owes you, who is due back, and how your week is going.



### IN THIS PART

Billing and the payer view

Recalls

Your week

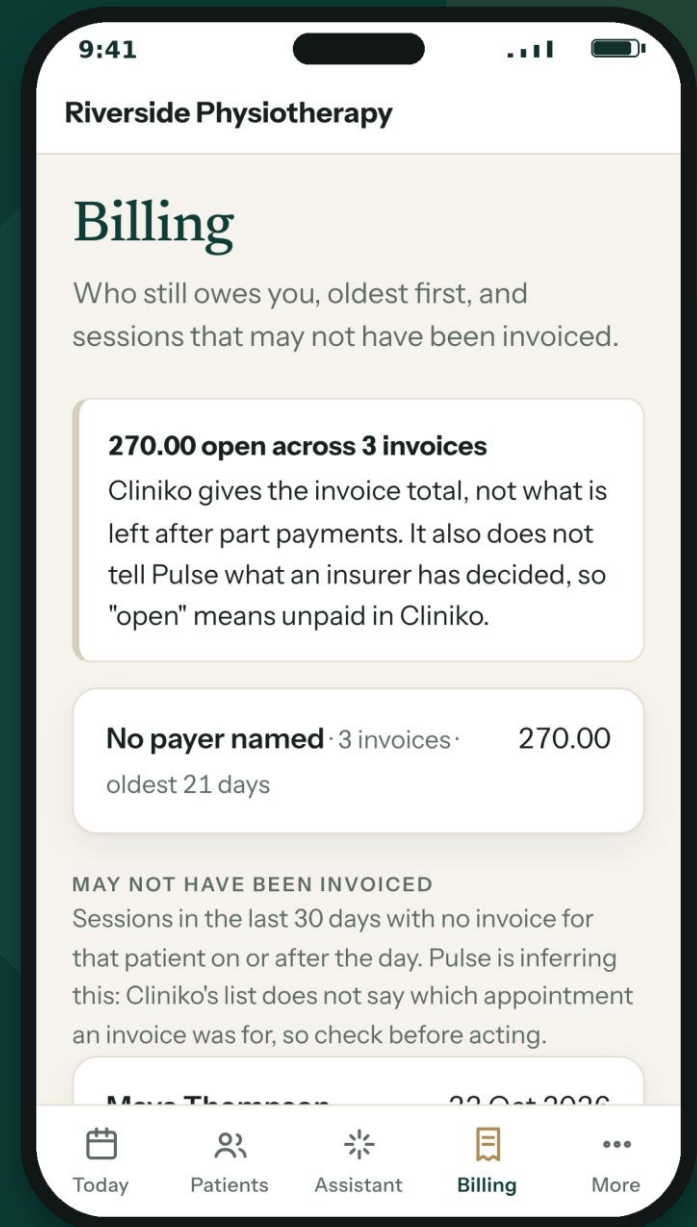
# Billing: who still owes you

Open money grouped by who is paying, oldest first, with the sessions that may never have been invoiced.

FIND IT **Tab: Billing**

- 1 Read the top box: the total open across how many invoices.
- 2 Tap a payer to see totals by age: 0 to 30, 31 to 60, 61 to 90 and over 90 days.
- 3 Tap "Open patient" or "Write to them" to start a letter to that payer.
- 4 Check "May not have been invoiced" for sessions in the last 30 days without an invoice.

**Good to know** Pulse is honest about its limits. "Open" means unpaid in Cliniko, and the not-invoiced list is an inference, so check it before acting. Pulse cannot create or send invoices.



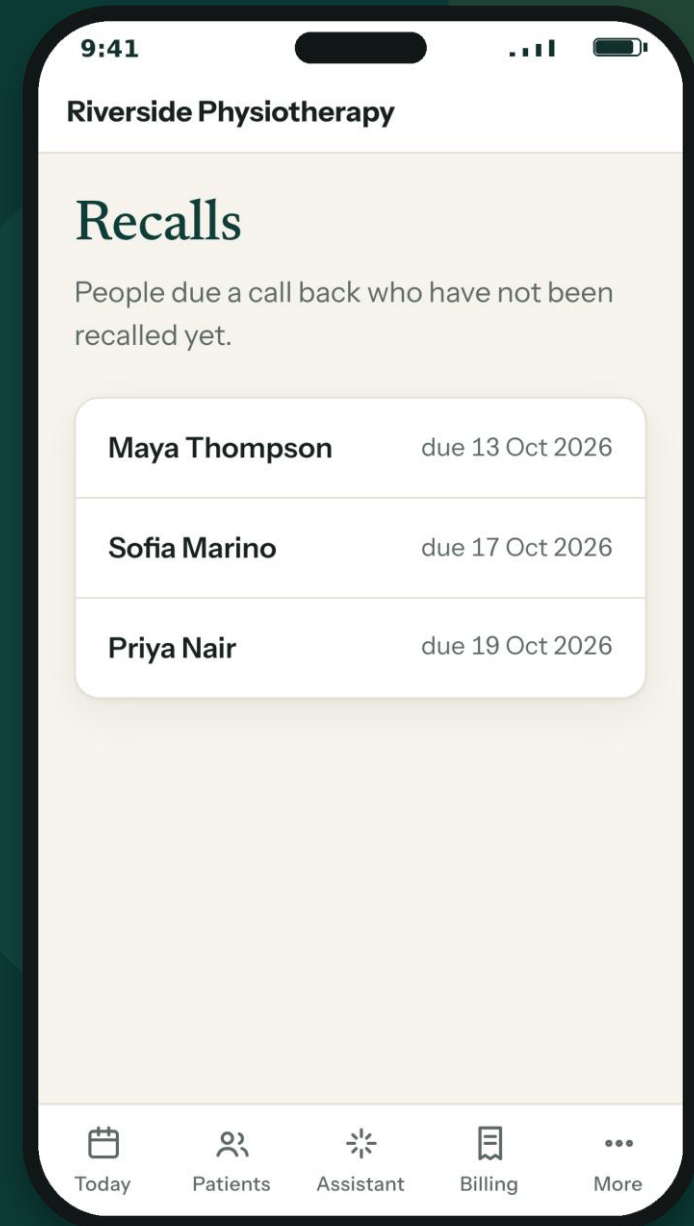
# Recalls: who is due back

People due a call back who have not been recalled yet, all in one list.

FIND IT More, "Recalls"

- 1 Read the list: patient name and the date they were due.
- 2 Tap a row to open the patient.
- 3 Send the reminder message from the Assistant, which also lets you mark the recall done.

**Good to know** Showing recalls due today or earlier that are not marked done. The first 100 are listed.



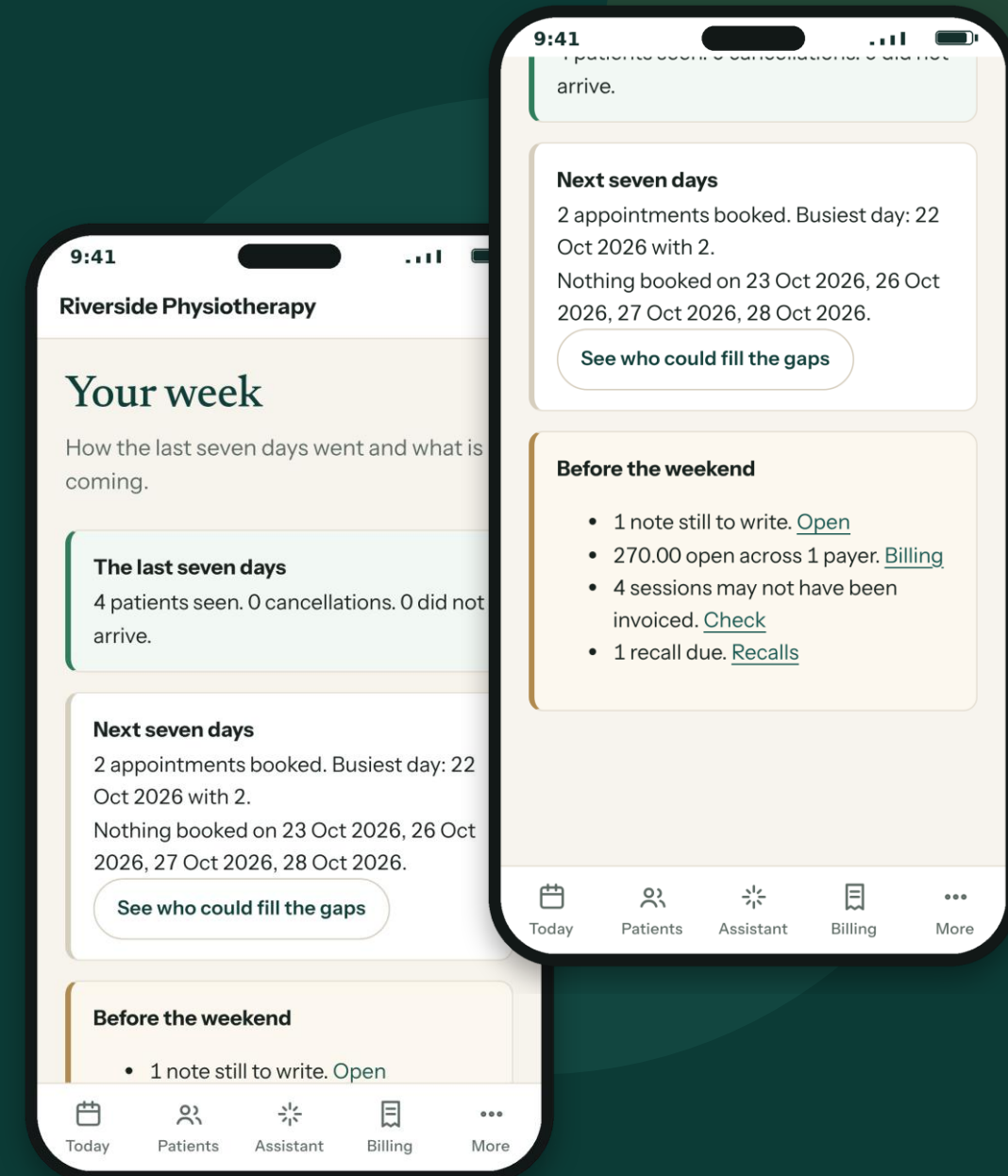
# Your week at a glance

How the last seven days went, what is coming, and what to tidy before the weekend. Every number is counted exactly, not guessed.

**FIND IT** More, "Your week". Also the Friday evening notification

- 1 "The last seven days": patients seen, cancellations, did not arrive.
- 2 "Next seven days": appointments booked, busiest day and any empty days.
- 3 Tap "See who could fill the gaps" to open the Assistant.
- 4 "Before the weekend" lists notes to write, money open, recalls due and patients gone quiet.

**Good to know** Nothing waiting? It says "A clean week." Saturday and Sunday are not flagged as empty.



# 09

## Your own time

You are more than your diary. Pulse plans around your life, and keeps it private.



### IN THIS PART

My own time and your people

Phone calendar

Notifications

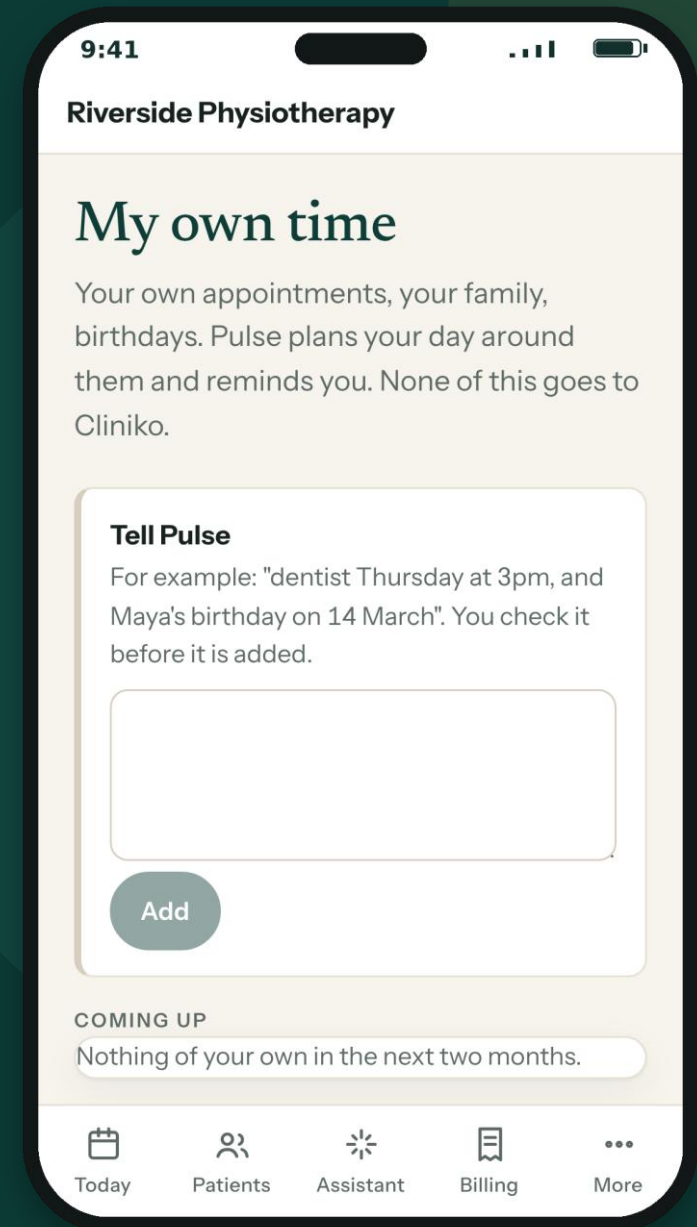
# My own time

Your dentist, the school run, a birthday. Tell Pulse once. It plans your day around them and reminds you. None of it goes to Cliniko.

**FIND IT** More, "My own time"

- 1 Under "Tell Pulse", type something like "dentist Thursday at 3pm, and Maya's birthday on 14 March" and tap "Add". Check the entries, then tap "Add it".
- 2 See "Coming up" for the next two months. "Remove" deletes one.
- 3 Prefer to type it in? Use "Add by hand" with a date, time, repeat and reminder.
- 4 Under "Your people", add a name, who they are to you and a birthday. Pulse adds a yearly reminder.

**Good to know** Timed entries show on Today and warn you when a booking would clash. Reminders say only that you have something of your own, never what it is.



# Your phone calendar

Two separate options. Put your Cliniko appointments into your phone calendar, and let Pulse read your calendar to warn you of clashes.

FIND IT More, "Phone calendar"

- 1 Tap "Add to my calendar" and allow access. Your next two weeks appear.
- 2 Tap "Refresh my calendar" to update them. "Remove them" takes them back out.
- 3 Tap "Check my calendar for clashes" so Pulse warns you when a booking would clash.
- 4 "Stop checking my calendar" switches it off.

**Good to know** Events carry only the time and the patient's initials, such as "Pulse: P.S." so no patient name ever reaches a cloud calendar. Clash checking stays on your phone.



## Your calendar, your diary, one picture.

Phone app only. Initials only, never full names.

# Notifications that respect you

Pulse nudges you on your phone, and never puts a patient name on the lock screen. If there is nothing to say, it says nothing.

## FIND IT More, "Phone notifications"

- 1 Tap "Turn on notifications" and allow them.
- 2 Tick what you want: a morning note, an evening note, a note before each appointment, and free slots.
- 3 Pick the "Time" for the morning and evening notes.

### Set by default

Morning note at 08:00, evening note at 17:00 and free slots are on. "Before each appointment" is off until you choose it. A Friday evening note shows your week. Your own-time reminders arrive whenever notifications are on.



PULSE

08:00

**Good morning, Anna**

6 appointments today. 2 things need you.



PULSE

11:20

**A slot has come free**

Thursday 10:00. 2 patients are waiting for one.



PULSE

09:30

**10:00 is coming up**

Tap to see who it is and check them in.



PULSE

17:00

**Before you go, Anna**

3 notes are still to write.

# 10

## Everything else

Every Cliniko module, every setting, and every control you own.  
Tidy, private and entirely yours.



### IN THIS PART

All Cliniko modules

The More screen

Settings that make Pulse yours

What Pulse has learned

Account, privacy and the practice owner

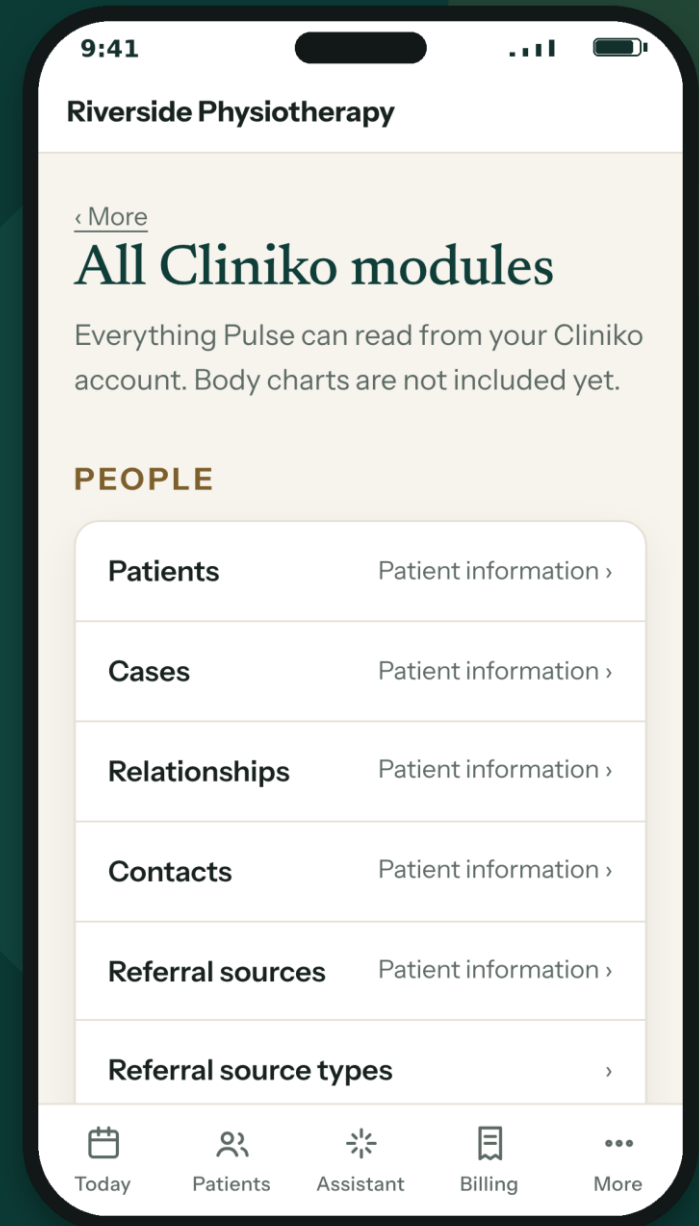
# All Cliniko modules

A friendly, read-only window onto the rest of your Cliniko, for the moments when you just need to look something up.

FIND IT More, "All Cliniko modules"

- 1 Tap a module under its group.
- 2 A list opens with a title and a one-line summary for each. The first 50 are shown.
- 3 Tap a row for the detail, with dates in your time zone.
- 4 Use the back links at the top to return.

**Good to know** Forty-three modules in eight groups: People, Diary, Clinical, Billing, Services and products, Practice, Availability and Settings. Body charts are not included yet.



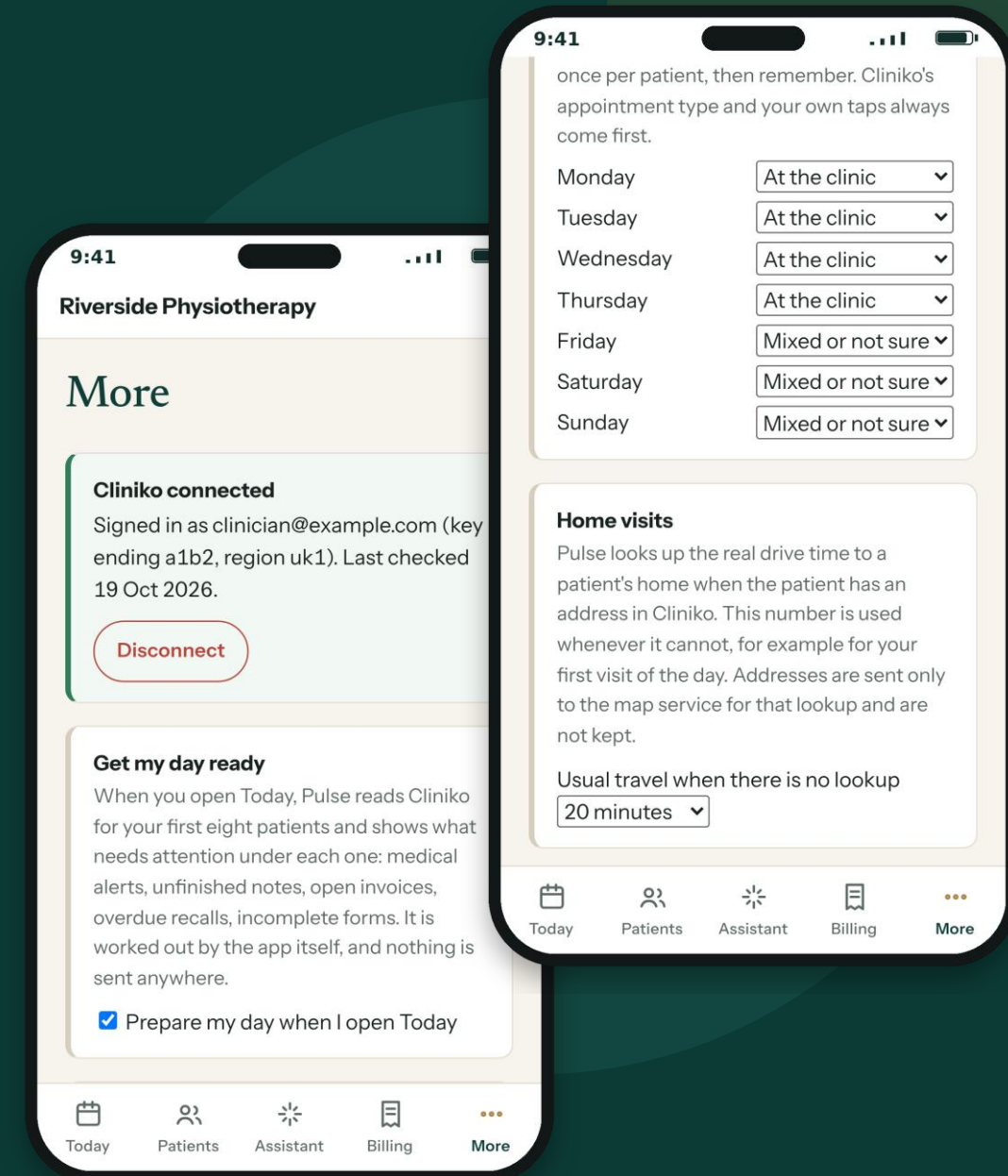
# The More screen

Your control room. Your Cliniko connection, your settings and a link to every part of Pulse live here.

FIND IT **Tab: More**

- 1 The top box shows who is connected. "Disconnect" removes the key from Pulse. Nothing in Cliniko changes.
- 2 Below are your settings: notifications, "Get my day ready", "Your usual week", "Home visits" and what Pulse has learned.
- 3 Then the list: Talk to Pulse, My own time, Your week, Billing, Phone calendar, Session scribe, Ask, Assistant, All Cliniko modules, Recalls, Subscription and Account and settings.

**Good to know** Anything you cannot find on the tab bar is here.



# Settings that make Pulse yours

Three small settings that teach Pulse how you work, so it asks you less.



## Get my day ready

Tick "Prepare my day when I open Today" and Pulse reads Cliniko for your first eight patients and shows what needs attention under each. On by default.



## Your usual week

For each day pick "Mixed or not sure", "At the clinic" or "Home visits". Pulse uses it to guess clinic or home, and asks only when it cannot tell.



## Home visits: usual travel

Choose how long you usually need to reach a home visit, from none to 120 minutes. Used when a real drive time is not available.

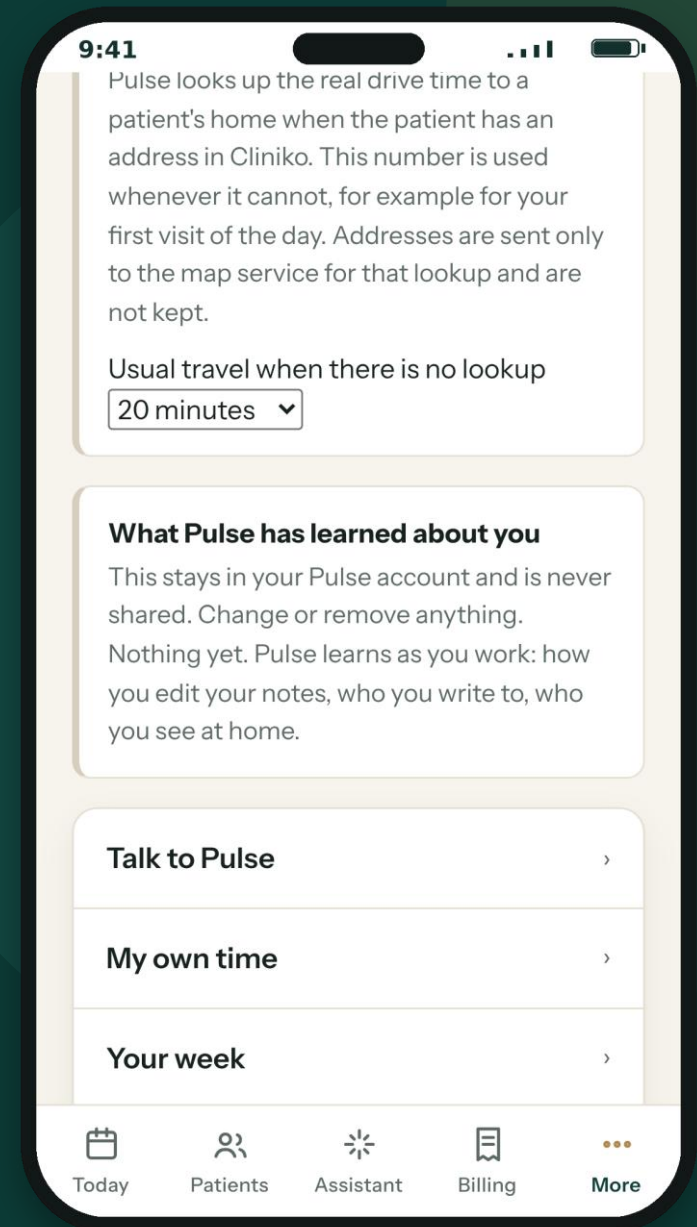
# What Pulse has learned about you

Pulse picks up your habits as you work. You can see all of it, change it, or wipe it clean.

**FIND IT** More, "What Pulse has learned about you"

- 1 "How you like your notes written": learned from your edits to scribe drafts.
- 2 "People you often write to": from the Letters you draft.
- 3 "Where you usually see patients": clinic or home, by patient number.
- 4 Tap "Edit" then "Save", tap "Forget" on a line, or tap "Forget everything".

**Good to know** It stays in your Pulse account and is never shared. Your Cliniko records are not affected if you forget.



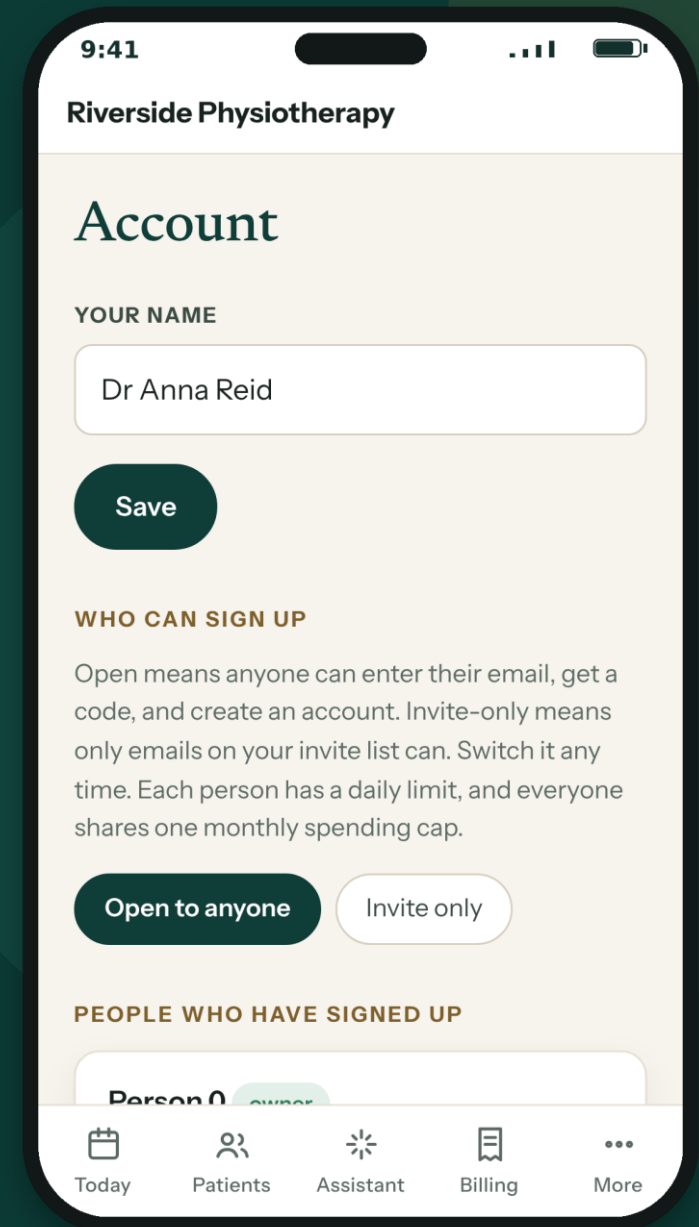
# Your account

Your name, your sign out and, whenever you want, a complete exit. You are always in control of your data.

**FIND IT** More, "Account and settings"

- 1 Edit "Your name" and tap "Save".
- 2 Tap "Sign out" to leave this device.
- 3 Read the "Privacy Policy" and "Terms of Use" any time.
- 4 "Delete my account" removes your Pulse account, saved key, settings and usage. Type DELETE to confirm.

**Good to know** Deleting your account does not cancel a paid subscription, so cancel it in your store as well. Your clinic records in Cliniko are never touched.



## If you run the practice

Owners get a few extra controls in Account and settings, so you decide who can join and what it costs.

**FIND IT** More, "Account and settings" (owner only)

- 1 "Who can sign up": choose "Open to anyone" or "Invite only".
- 2 "People who have signed up": give a "Free pass", "Pause" or "Reinstate" anyone.
- 3 "Invite list": add or remove up to 25 emails.
- 4 "What each clinician costs": see the estimated running cost per clinician, this month or last.

**Good to know** Pausing signs that person out straight away, and you can reinstate them. The cost screen is an estimate from list prices, not an invoice.



## You decide who joins.

Open to anyone or invite only. Free passes, pauses and an invite list for up to 25 people.

# Safe by design

A few more things worth knowing, because trust is the whole point.



## Locked and private

App lock after a minute away. No patient name ever shows on a lock screen.



## Names hidden

Patient names are replaced before your brief and your questions are processed, then put back for you.



## Recordings not kept

Your voice is turned into text and thrown away. The audio is never stored.



## Honest about freshness

After five minutes on a screen Pulse tells you it may be out of date, with a Refresh button.

# Quick reference: where do I go?

| I want to            | Go to                     |
|----------------------|---------------------------|
| Today, the diary     | Today                     |
| Check a patient in   | Today, "Check in"         |
| Write my brief       | Today, "Write my brief"   |
| Move or cancel       | Today, "Move" or "Cancel" |
| Book an appointment  | Today, "Book"             |
| Book or add by voice | Today, "Talk to Pulse"    |
| Find a patient       | Patients                  |
| Add a patient        | Patients, "Add a patient" |
| Set a recall         | Patient page, Overview    |
| Add a medical alert  | Patient page, Alerts      |

# Quick reference: and for the rest?

| I want to              | Go to                       |
|------------------------|-----------------------------|
| Record a session       | More, "Session scribe"      |
| Draft a letter         | Assistant, "Draft a letter" |
| Ask a question         | More, "Ask"                 |
| See what needs me      | Assistant                   |
| Chase an invoice       | Billing, or Assistant card  |
| See who is due back    | More, "Recalls"             |
| Check my week          | More, "Your week"           |
| Add something personal | More, "My own time"         |
| Change my settings     | More                        |
| Delete my account      | More, Account and settings  |

# Your clinic, in your pocket.

Thank you for choosing Pulse. We built it to give you back your evenings, your attention and your calm. Enjoy the day ahead.

Antara Innovations

