



Rewarding Learning

ADVANCED
General Certificate of Education
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**Applied Information and
Communication Technology**

Case Study
Assessment Unit A2 7
assessing
Unit 7: Investigating Systems

[A6J11]

PRE-RELEASE CASE STUDY



TIP TOP TOES

TIP TOP TOES provides the ultimate in foot care for the public. Opened in Bangor in 2004, the TIP TOP TOES private clinic has now more than 1000 clients. The owner of the business, Janet Legg, a highly qualified chiropodist, came up with the idea of providing more than just a chiropody service to the public. Along with all of the normal facilities offered by this kind of practice, she decided to make a total range of foot care available to the public. The services include chiropody services, foot therapies and treatments. A full range of foot care products is also available for purchase.

Janet put a great deal of effort and money into launching the business and there is no doubt that it is hugely successful. The clinic is open Monday to Friday from 8am until 8pm. Janet believed that this would be very helpful to people who would have to make arrangements to leave work to attend appointments. This has proved to be absolutely correct and is one of the many advantages the clinic offers. The clinic also provides a home visit service which is of particular benefit to elderly clients. Home visits are conducted in the mornings on Monday, Wednesday and Friday and in the afternoons on Tuesday and Thursday. Janet is also considering the possibility of Saturday opening.

The clinic is staffed by Janet and four other fully trained chiropodists as well as a therapist, two secretaries and two cleaning staff. The secretaries work either from 8am until 2pm or from 2pm until 8pm. At any one time there are at least two trained chiropodists working in the clinic with a third one doing the home visits. The therapist is available every day from 2pm until 8pm.

There is a huge demand on the resources of the clinic because of its popularity. The staff are stretched to the limit and on a day when someone is sick it is sometimes necessary to reschedule times by trying to fit clients in with one of the other chiropodists or to just cancel the appointment. The secretary will first of all try to accommodate the client with another chiropodist and if that does not work will try to cancel the appointment and agree an alternative one over the phone. This is not very satisfactory for the client and there have been occasions when it has not been possible to contact a client and they have turned up. This is not good for the business and if this happens, Janet allows the next appointment free of charge.

When the therapist is off, there is no alternative other than to reschedule the appointment.

Clients can make appointments for chiropody services (15 minute duration), foot treatment services (30 minute duration) or therapy services (30 minute duration). Sessions can be booked in multiples of these time slots if a double session or more is required for a particular service.

Appointment books are kept beside the telephone in the reception area. There is one book for Chiropody / Treatment and one for Therapy services. Time is marked in 15 minute intervals on the left hand side of the page. The secretary has a weekly schedule on the notice board indicating which staff members are working in each time slot for that week. Every Monday, the secretary will blank out the times each staff member is not available for each day of that week and indicate who is doing the home visits for that week.

The secretary must also indicate the type of appointment by writing C (chiropractic), TR (treatment) or TH (therapy) after the name.

When a client first makes an appointment, usually by telephone, the name, address, telephone number and type of appointment is recorded in a 'New Client' notebook and an appointment card is sent out. The appointment is then recorded in the relevant appointment book.

Existing clients can book further appointments on the day of their treatment or by telephone. These are recorded in the same way.

When a new client attends for the first time, an extra 15 minutes is assigned to the appointment time. This is to allow time for a client history to be recorded as a file has to be created for each client. This file has to be updated each time the client attends thereafter. The secretary must have these records filed by either 2pm or 8pm each day. In addition, the files for the next day must be selected and placed in order of appointment time for each member of staff. The client history files must be updated by the staff member at the end of each appointment and left for filing by the secretary.

Clients can pay immediately after their appointment by cash, cheque, debit card or credit card. They are given a receipt of payment and the transaction is noted in a payment ledger book. This book is organised by date and the secretary records the client name, the amount and the transaction type (CA cash), (CH cheque), (D debit), (CC credit card).

Alternatively, clients who are having a course of treatment receive an invoice at the end of their treatment. Payment may be made in person or by post using any of the methods noted already. The transactions are recorded in exactly the same manner and receipts are issued accordingly.

Clients wishing to purchase foot care products make their request and if the product is available, they pay the secretary by cash, cheque, debit or credit card. Again these transactions are recorded in the payment ledger book (P – purchase) and a receipt issued. If the required product is not in stock, the secretary notes the item and places it on a stock out list. The secretary is responsible for ordering stock at the end of each month and must record the orders in a stock order book. The secretary must also take care of stock deliveries and ensure that the original orders match the delivery details. Sometimes this is not the case and the supplier must be notified. Invoices are also received from suppliers and the supplier payment issued. Supplier receipts are recorded.

Management of the stock is problematic because there is often quite a delay from when an item is out of stock until when it is replaced. Clients are generally not too happy about this especially since the chiropractors and therapist will frequently recommend particular products to them.

The secretaries find the whole process very tedious and time consuming. In addition to this, Janet is not keen to carry too much stock. Space is an issue as well as the unpredictability of sales and the worry of being left with a lot of expensive items.

The secretary must also deal with cancellations and clients who do not attend. When a cancellation is made, the secretary crosses out the client name in the appointment book and makes a note of the time slot and available staff member on a 'spare appointment' list. Quite often, clients will ring up looking for an immediate appointment. Their details are recorded on a 'waiting list'. The secretary tries to allocate the available cancellations on a 'first come first served' basis unless a genuine emergency arises.

Cancellations are accepted up to 24 hours before the appointment, otherwise a cancellation fee of £10 is imposed. This amount must be paid before any further appointments can be made. Clients who cancel without appropriate notice and clients who do not attend for an appointment are billed for this amount. Payments can be made in the same way and are recorded in the payment ledger book (B – bill). The client details are recorded in a Non Attendance book. When the payment is made, the client name is crossed off. Sometimes clients manage to make further appointments in spite of having an outstanding fee to pay because the secretary does not remember. This is unsatisfactory and can lead to some embarrassment for the secretary who has to request payment before the appointment can proceed. Some clients actually claim that they have made the cancellation payment and this is even more difficult to deal with.

Janet is facing a range of issues that must be addressed to ensure that her business continues to be successful. She is aware that there is significant manual effort involved in all of the administrative processes associated with the business. She is also very aware that the only way she can obtain any useful management information is by physically looking through records and files. She cannot generate useful reports. She cannot track client history, money or stock. Janet has decided to seek advice!