

Compass: a Clearer Direction for Your Practice?

An exciting find for me at the 2011 Joint Homeopathic Conference in Alexandria, Virginia was the Compass Homeopathic Software program. Compass is a fully integrated practice management software program, designed for use on both Macs and PCs. Miranda Castro & Jim Hoyt developed the program, which incorporates all client information in one place, including case notes, treatment choices, demographics, calendar, and payment methods.

The intuitive nature of the program allows the provider to choose from a preselected set of drop down menus, thus maintaining detailed charting with the ability to track and measure results. Selections from drop down menus are built in, but can also be customized to fit your individual practice. A few of these include selecting multiple practice locations and specific types of appointments such as phone or Skype, constitutional or follow up, and various fees for service. Case management is very detailed with remedy selection and dosing, in addition to rationale and confidence level of treatment decision. Within the case note file there is also a section to insert a copy of the rubric graph from any homeopathic repository software or other files. I have found this especially helpful in future analysis of the case, providing a snapshot of my thoughts on prescribing at the time.

Compass is also designed for ease and effectiveness of communication with clients through letters and emails. All forms and documents can be produced using individualized logos and business designs with the ability to email them directly to clients. I think it not only gives a personal touch, but also appears more professional as a business.

A financial and business management system is built in, with the ability to generate invoices, statements, and keep track of expenses. In the short time I have used the program, I have found it easy to learn and navigate basic functions. The more detailed functions and personalizing tabs have been worth the time investment. Once I had reviewed the introductory materials and videos, Miranda spent about an hour with me going over specifics and clearing up my questions.

After using the program for three months, I am defining my private practice much more clearly as a business. I am able to maintain detailed records, run financial reports, and communicate with clients more efficiently. I look forward to continued growth with increased income in my private practice with the help of the Compass Homeopathic Software Program.

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