\ THE CLINICIAN'S ENGINE Clinical Practice Toolkit

User Manual & Onboarding Guide

Field: Clinical Practice · Engine /clinician · \ Offline.Ltd

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CLINICAL TOOLS	NOTE FORMATS	100% OFFLINE	FREE UPDATES

This manual covers every tool in The Clinician's Engine: from client registration and session documentation through treatment planning, outcome measurement, billing, and caseload oversight. It includes keyboard shortcuts, troubleshooting guidance, an accuracy note, and a clinical glossary. Open the HTML file in any modern browser and you are ready to begin.

Version 2.0 · For use with The_Clinicians_Engine_v2__1_.html

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1 Getting Started

The Clinician's Engine is a single HTML file. No installation, no accounts, no internet connection required. Double-click it and start working.

System Requirements

BROWSER	VERSION	NOTES
Chrome / Edge	88+	Recommended. Full feature support.
Firefox	90+	Fully supported.
Safari	15+	Supported. Test encrypted export.
Mobile (iOS / Android)	Latest	Functional; desktop recommended for extended use.

Opening the File

Locate the file on your device and double-click it, or drag it into an open browser window. You will see the welcome screen with a brief overview of the ten tools and the clinical workflow loop: Register → Assess → Plan → Measure → Review → Report.

💡 **PRO TIP**

Email the HTML file to yourself as a backup. Store it on an encrypted USB drive alongside your exported state files for maximum security.

The Welcome Screen

On first launch, a modal introduces the engine's purpose and v2.0 features: Session Intelligence, Report Forge, encrypted export with AES-256-GCM, and autosave. Click **Got it — let's begin** to dismiss. The welcome screen will not appear again on the same browser (stored in localStorage).

2 Interface Overview

The interface is divided into four horizontal layers: header, tab bar, content area, and disclaimer bar.

The Header

Displays the red backslash brand mark, the product name (**THE CLINICIAN'S ENGINE**), the field label (*Field: Clinical Practice*), and the engine identifier (*/clinician — Offline.Ltd*). The left border is accented with the purple field colour.

The Tab Bar

Ten tool tabs on the left: Clients, Session Notes, Treatment, Progress, Outcomes, Schedule, Billing, Caseload, Resources, Supervision. Two system tabs on the right: ■ **Files** and **? Help**. An amber dot appears on the Files tab when unsaved changes exist. The active tab has a red underline (tool tabs) or steel underline (system tabs).

The Content Area

The main workspace. Each tab's panel appears here. Most tool panels include a title, a help link, input fields, stat grids, and action buttons. Data flows between tools — selecting a client in one tool populates dropdowns across all others.

Tooltips

Small circled question marks (**?**) next to field labels. Click or hover to reveal contextual help text. Only one tooltip is visible at a time.

The Disclaimer Bar

Fixed footer: "Not a medical device. Clinical records are your professional responsibility." Links to the full disclaimer in Help. Displays the version number on the right.

3 Saving & File Management

All data is stored in your browser's localStorage. The engine autosaves every 60 seconds when changes are detected. For portable backups, use the Files tab.

Autosave

Enabled by default. A green dot next to "Autosave" confirms the last save. Toggle autosave on or off from the Files tab. An amber dot pulses during a save operation.

Exporting State

1. Switch to the ■ **Files** tab.
2. Click **Export** ↓ for a plain JSON backup.
3. The file downloads as *clinician.engine.state_YYYY-MM-DD.json*.
4. For encrypted backups, click ■ **Export Encrypted**, set a passphrase (minimum 8 characters), confirm, and export. The file downloads as *.ckenc*.

Importing State

1. Switch to the ■ **Files** tab.
2. Click **Import** ↑ and select a *.json* state file.
3. Confirm the overwrite warning — import replaces all current data.
4. For encrypted files, click ■ **Import Encrypted**, select the *.ckenc* file, enter the passphrase, and confirm.

⚠️ **CAUTION**

Importing a state file overwrites ALL current data permanently. Always export a backup before importing. The engine validates that the file belongs to the Clinician's Engine (checks the *knife* field) and rejects mismatched files.

Per-Tool State Cards

Below the full-engine controls, each tool's data count is displayed on individual state cards (e.g. "■ Clients — 5 items"). This gives a quick overview of where your data lives.

Clearing All Data

The **Clear All Data** button permanently deletes everything from localStorage. A confirmation dialog warns you to export first. This action cannot be undone.

💡 **PRO TIP**

Name your export files by date and context: *clinician.engine.state_2026-03-friday-backup.json*. Keep at least three rolling backups on encrypted storage.

4 Client Register

Tab: Clients · Shortcut: Ctrl+1

The anchor for everything. Every other tool references clients from this register. Use pseudonymised identifiers (initials + number) for data protection.

Inputs

FIELD	DESCRIPTION
Identifier	Pseudonymised client ID (e.g. AB-001). Editable inline.
Presenting Issues	Free text. Primary concerns and referral reasons.
Referral	Source of referral (GP, self, agency, etc.).
Start Date	Date client entered your caseload.
Status	Active, Waitlist, or Discharged. Filters throughout the engine.
Fee (£)	Session fee. Used by Billing Tracker.
Consent Date	Date informed consent was obtained.
Emergency	Emergency contact name and phone number.
GP	GP name and surgery.

Outputs

OUTPUT	DESCRIPTION
Stat Grid	Total, Active, Waitlist, Discharged counts.
Client Cards	Expandable cards with all fields. Delete cascades to all linked data.

Use Cases

Register every client before using any other tool. The client dropdown in Session Notes, Treatment, Outcomes, Schedule, and Billing all draw from this list.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Client missing in dropdowns	Switch to Clients tab and add them first. Dropdowns refresh on tab switch.
Accidental delete	Deletion cascades to ALL linked records. Export a backup before deleting.

💡 **PRO TIP**

Create your client here first. Their ID appears everywhere automatically.

5 Session Notes

Tab: Session Notes · Shortcut: Ctrl+2

Structured clinical documentation with four format options: SOAP (Subjective, Objective, Assessment, Plan), DAP (Data, Assessment, Plan), BIRP (Behaviour, Intervention, Response, Plan), or free-form. Includes risk assessment flagging.

Inputs

FIELD	DESCRIPTION
Client	Select from registered clients.
Format	SOAP, DAP, BIRP, or Free-form. Sets section headings.
Section fields	Dynamic text areas matching the chosen format.
Risk	None, Low, or High. High flags pulse in Caseload.
Risk Notes	Free text detail for flagged sessions.

Outputs

OUTPUT	DESCRIPTION
Note Cards	Date, session number, format badge, risk flag, full note text.
Active Goals Reference	Shows current treatment goals for the selected client above notes.

Use Cases

Document each session immediately. Use SOAP for structured clinical notes, BIRP for behavioural interventions, free-form for reflective practice.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
No format sections showing	Ensure a client is selected and a format is chosen before adding.
Risk flag not visible in Caseload	Caseload reads the most recent note’s risk level. Ensure the latest note is flagged.

💡 **PRO TIP**

When you mark an appointment as ‘attended’ in Schedule, the engine offers to create a session note automatically.

6 Treatment Planner

Tab: Treatment · Shortcut: Ctrl+3

Goal-directed care planning. Define measurable treatment goals per client with target dates, intervention types, review cycles, and status tracking.

Inputs

FIELD	DESCRIPTION
Client	Select from registered clients.
Goal	Specific, measurable treatment goal description.
Target Date	Expected completion date.
Status	Active, Achieved, or Revised.
Review Every	Number of sessions between reviews (default 6).
Interventions	Therapeutic approaches (e.g. CBT, EMDR, person-centred).

Outputs

OUTPUT	DESCRIPTION
Goal Cards	Colour-coded status badge, goal text, target, interventions.

Use Cases

Set goals at intake. Review at the specified cycle. Mark achieved to track progress. Revised goals maintain audit trail.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Goal not showing in Session Notes	Goals appear as an ‘Active Goals’ reference box above notes when the same client is selected.

💡 **PRO TIP**

Link goals to specific outcome measures. When a PHQ-9 score drops below the clinical threshold, mark the related goal as achieved.

7 Progress Tracker

Tab: Progress · Shortcut: Ctrl+4

Longitudinal view of a client’s journey. Combines session count, goal timeline, outcome score sparklines, and risk history in one dashboard.

Inputs

FIELD	DESCRIPTION
Client	Select from registered clients.

Outputs

OUTPUT	DESCRIPTION
Stat Cards	Sessions, Last Session date, Active Goals, Achieved Goals.
Goal Timeline	Visual status indicators: ■ active, ✓ achieved, ■ revised.
Outcome Sparklines	Per-measure-type score charts over time.
Risk History	Chronological list of risk flags from session notes.

Use Cases

Review before supervision. Present to clients during review sessions. Identify trends across measures.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Sparklines not rendering	Sparklines draw after the tab becomes visible. Switch away and back if needed.
Flat sparkline	If all scores are identical, the chart displays a horizontal line (safe division guard).

8 Outcome Measures

Tab: Outcomes · Shortcut: Ctrl+5

Validated psychometric instruments with auto-scoring and severity bands. Built-in measures: PHQ-9 (depression), GAD-7 (anxiety), CORE-10 (wellbeing). Custom measures supported with manual scoring.

Inputs

FIELD	DESCRIPTION
Client	Select from registered clients.
Measure	PHQ-9, GAD-7, CORE-10, or Custom.
Item Scores	Per-question Likert responses (0–3 for PHQ-9/GAD-7, 0–4 for CORE-10).
Custom: Name	Name for custom measures (e.g. WEMWBS).
Custom: Total	Manual total score entry.
Custom: Item Scores	Comma-separated individual item scores.

Outputs

OUTPUT	DESCRIPTION
Measure Cards	Date, type badge, severity band, total score, per-item breakdown.

Use Cases

Administer at intake and regular intervals. Track clinical change. Evidence treatment effectiveness for commissioning or insurance reports.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Wrong severity band	Verify all items are scored. Missed items default to 0 and lower the total.
Custom measure trajectory	Custom measures appear in Caseload trajectory when 2+ administrations exist.

⚠️ **CAUTION**

Outcome measures are screening tools, not diagnostic instruments. Always interpret scores in clinical context.

9 Schedule Manager

Tab: Schedule · Shortcut: Ctrl+6

Weekly calendar view. Add one-off or recurring appointments. Click appointments to cycle status: scheduled → attended → cancelled → no-show. Attended sessions can auto-create session notes. Status changes cascade to Billing.

Inputs

FIELD	DESCRIPTION
Client	Select from registered clients.
Date	Appointment date.
Time	Appointment time (default 09:00).
Duration	Session length in minutes (default 50, range 15–120).
Recurring	One-off, Weekly, or Fortnightly.
Weeks	Number of recurrences (1–52, default 8).

Outputs

OUTPUT	DESCRIPTION
Weekly Calendar Grid	Colour-coded appointments: purple (scheduled), green (attended), red (cancelled), amber (no-show).
Navigation	Prev/Next week, Today button, date range label.

Use Cases

Plan client schedules. Track attendance for clinical and billing purposes.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Duplicate appointment warning	The engine prevents scheduling the same client at the same date and time (unless previous was cancelled).
Billing not updating	Cancelling or no-showing an appointment automatically writes off the billing entry.

💡 **PRO TIP**

When you cycle an appointment to ‘attended’, the engine offers to create a session note. Accept to pre-populate the date and client.

10 Billing Tracker

Tab: Billing · Shortcut: Ctrl+7

Track fees, generate invoices, manage payment status. Entries are auto-created when appointments are scheduled. Includes bulk mark-as-paid and monthly summary.

Inputs

FIELD	DESCRIPTION
Client Filter	All Clients or specific client.
Entry Status	Outstanding, Invoiced, Paid, or Written Off.
Invoice Client	Client for invoice generation.
Invoice Period	This Month, Last Month, or All Outstanding.

Outputs

OUTPUT	DESCRIPTION
Stat Cards	This Month revenue, Total Paid, Outstanding amount, Entry count.
Billing Table	Sortable table: Date, Client, Fee, Status, Delete.
Invoice Preview	Professional invoice layout with line items and total.
Download Invoice	Saves as a standalone HTML file.

Use Cases

Track all session fees. Generate invoices for clients or insurers. Use the monthly summary for tax records.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Zero fee showing	Check the client’s fee in Client Register. New entries inherit the client’s current fee.
‘Bulk mark paid’ missing	Button only appears when outstanding entries exist for the current filter.

11 Caseload Overview

Tab: Caseload · Shortcut: Ctrl+8

Bird’s-eye view of your entire practice. Pulls data from all other tools. Shows session count, last seen, risk level, outcome trajectory, and outstanding billing per client. Sortable and filterable.

Inputs

FIELD	DESCRIPTION
Status Filter	Active, All, Waitlist, or Discharged.
Sort	Risk Level, Last Session, or Name.

Outputs

OUTPUT	DESCRIPTION
Stat Cards	Active clients, High Risk count, Outstanding total, Showing count.
Caseload Grid	Per-client row: Client, Sessions, Last, Risk, Trajectory, Owed.
Trajectory	Improving (■), Deteriorating (■), or Stable (→) based on most recent outcome measure type with 2+ entries.

Use Cases

Daily practice check-in. Supervision preparation. Identify clients needing urgent attention via risk flags and deteriorating trajectories.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Trajectory shows Stable with no measures	At least two administrations of the same measure type are needed for trajectory calculation.
Client not appearing	Check the Status filter. Discharged clients are hidden under ‘Active’.

12 Resource Library

Tab: Resources · Shortcut: Ctrl+9

Store and tag clinical resources: worksheets, handouts, psychoeducation materials, grounding exercises, thought records. Filter by tag.

Inputs

FIELD	DESCRIPTION
Title	Resource name.
Content	Description or full text of the resource.
Tags	Comma-separated tags (e.g. CBT, anxiety, worksheet).
Tag Filter	Filter resources by tag.

Outputs

OUTPUT	DESCRIPTION
Resource Cards	Title, content, tag badges.

Use Cases

Build a library of go-to interventions. Tag by modality and presenting issue. Reference during session preparation.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Tags not filtering	Ensure tags are comma-separated with no extra spaces at the beginning.

13 Supervision Notes

Tab: Supervision · Shortcut: Ctrl+0

Document supervision sessions for reflective practice and CPD. Link to specific clients (pseudonymised), record issues raised, supervisor feedback, and agreed actions.

Inputs

FIELD	DESCRIPTION
Client	Optionally link to a registered client.
Date	Supervision session date.
Issue Raised	What was brought to supervision.
Supervisor Feedback	Supervisor’s response and reflections.
Actions	Agreed follow-up actions.

Outputs

OUTPUT	DESCRIPTION
Stat Cards	Total entries, Entries with actions.
Supervision Cards	Chronological entries with all fields.

Use Cases

Maintain supervision log for accreditation. Track action items. Review in preparation for annual appraisals.

Common Difficulties

PROBLEM	CAUSE & SOLUTION
Client dropdown empty	Add clients in Client Register first.

14 Session Intelligence

Sidebar · Shortcut: ■ button (bottom-right)

Session Intelligence is a pre-session briefing sidebar that compiles relevant client data into a single glanceable view. Activate it by clicking the purple ■ button in the bottom-right corner of the screen.

What It Shows

SECTION	DESCRIPTION
Clinical Snapshot	Last session date, number, active goals, current risk level.
Active Goals	Progress bars based on sessions since goal creation vs review cycle.
Outcome Measures	Per-type trajectory arrows: improving (■), deteriorating (■), stable (→).
Key Themes	Frequency-extracted keywords from the last 2–3 session notes.
Open Supervision Actions	Unresolved action items linked to this client.
Suggested Opening	Auto-generated opening question based on the last session's plan.

💡 **PRO TIP**

Open Session Intelligence before each session. Copy goal summaries or outcome data directly into your notes using the 'Copy' buttons within each section.

15 Report Forge

Modal · Shortcut: ■ buttons in tool headers

Report Forge generates professional clinical reports from your stored data. Access it from the ■ Generate Report buttons in Session Notes, Treatment, and Caseload tabs.

Report Types

TYPE	CONTENTS
GP Update / Progress Report	Session summary, treatment goals, outcome measures, billing summary.
Discharge Summary	Full case overview, risk assessment, discharge plan.
Insurance / Funding Review	Clinical justification with outcome evidence and billing data.
Court / Safeguarding Report	Risk assessment focus, chronological risk flags, recommendations.
Supervision Summary (CPD)	Supervision notes, actions, reflective practice log.

Outputs

Reports can be copied as text, downloaded as standalone HTML, or printed to PDF via the browser’s print dialog. Each report includes a signature block for professional endorsement.

⚠️ **CAUTION**

Reports are auto-generated drafts. Always review, edit the recommendations section, and verify accuracy before sharing with third parties.

16 Keyboard Shortcuts

Navigate the engine without touching the mouse.

`Ctrl + 1`	Clients
`Ctrl + 2`	Session Notes
`Ctrl + 3`	Treatment
`Ctrl + 4`	Progress
`Ctrl + 5`	Outcomes
`Ctrl + 6`	Schedule
`Ctrl + 7`	Billing
`Ctrl + 8`	Caseload
`Ctrl + 9`	Resources
`Ctrl + 0`	Supervision
`Ctrl + S`	Export All (download state file)
`Esc`	Close modals, sidebar, and dialogs

17 Troubleshooting

Blank screen on open

JavaScript must be enabled. Check browser settings. Some corporate firewalls block local HTML file execution — try a different browser.

Data gone after browser update

localStorage is cleared by some browser cleanup tools. Always export backups. Check for incognito/private mode which does not persist localStorage.

Encrypted export fails

Web Crypto API requires a secure context. Use HTTPS or file:// protocol. Safari may require explicit crypto permissions.

Client dropdowns empty

Add clients in the Client Register tab first. Dropdowns populate when switching tabs.

Calculations seem wrong

This is a practice organiser, not certified clinical software. Verify outcome scores manually against published scoring guides.

Tab bar scrolling on mobile

The tab bar is horizontally scrollable on small screens. Swipe left to reveal system tabs (Files, Help).

Import rejected

The file must have *"knife": "clinician"* in its root. Files from other Offline.Ltd products will be rejected.

Sparklines blank

Sparklines render when the tab is visible. Switch away and back. Ensure the canvas element has non-zero dimensions.

18 Accuracy & Limitations

The Clinician's Engine is a personal practice organiser. It is **not** a medical device, electronic health record (EHR), or clinical software. It has not been certified, validated, or approved by any regulatory body.

FEATURE	ACCURACY	NOTES
PHQ-9 Scoring	Matches published algorithm	Screening tool only. Not diagnostic.
GAD-7 Scoring	Matches published algorithm	Screening tool only.
CORE-10 Scoring	Matches published algorithm	Clinical cutoffs are guidelines.
Trajectory	Based on most recent measure pair	Not a clinical trend analysis.
Billing Totals	Arithmetic summation	Not accounting software. Verify for tax.
Report Forge	Auto-generated drafts	Always review before sharing externally.
Session Intelligence	Keyword frequency extraction	Not AI-powered clinical analysis.

⚠️ **DISCLAIMER**

You are solely responsible for your clinical practice, record-keeping, and regulatory compliance. The Clinician's Engine does not provide clinical advice, diagnosis, or treatment recommendations. Data stored in localStorage is not backed up automatically — export regularly. Clearing your browser data permanently erases all records.

19 Glossary

AES-256-GCM	Advanced Encryption Standard with 256-bit keys and Galois/Counter Mode. Used for encrypted exports.
Autosave	Automatic periodic save to localStorage (every 60 seconds when enabled).
BIRP	Behaviour, Intervention, Response, Plan — a structured session note format.
Caseload	The total number of clients currently under a clinician's care.
CORE-10	Clinical Outcomes in Routine Evaluation — 10-item wellbeing measure.
CPD	Continuing Professional Development. Required by most professional bodies.
DAP	Data, Assessment, Plan — a structured session note format.
Discharge	Formal ending of a therapeutic relationship with a client.
GAD-7	Generalised Anxiety Disorder 7-item scale. Severity bands: Minimal (0–4), Mild (5–9), Moderate (10–14), Severe (15–21).
JSON	JavaScript Object Notation. The format used for state export/import files.
Likert Scale	A rating scale (e.g. 0–4) used in psychometric measures.
localStorage	Browser-based storage that persists between sessions. Cleared by browser data wipes.
Outcome Measure	A validated psychometric tool used to quantify clinical change.
PHQ-9	Patient Health Questionnaire 9-item scale. Severity bands: Minimal (0–4), Mild (5–9), Moderate (10–14), Mod. Severe (15–19), Severe (20–27).
Pseudonymisation	Replacing identifying information with codes. Required for data protection in clinical records.
Report Forge	Built-in report generator producing GP, discharge, insurance, court, and supervision reports.
Risk Flag	A session-level indicator (None, Low, High) that surfaces in Caseload Overview.
Session Intelligence	Pre-session briefing sidebar compiling goals, outcomes, themes, and suggested opening.
Severity Band	Category label (e.g. Minimal, Mild, Moderate, Severe) assigned to an outcome measure score.
SOAP	Subjective, Objective, Assessment, Plan — the most common structured session note format.

Sparkline	A small inline chart showing score trends over time.
State File	A JSON export containing all engine data. Used for backup and transfer.
Trajectory	Direction of outcome score change: Improving, Deteriorating, or Stable.
Treatment Goal	A specific, measurable objective in a client’s treatment plan.

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Assess. Plan. Review.

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