

Data for Impact

National MSK database for private practice

Connecting your Practice Management System (PMS) to the Data for Impact (Dfl) Platform

Overview

What this integration does

This guide explains how to connect your Practice Management System (PMS) to the Data for Impact (Dfl) platform using an API key.

Once connected, eligible patient details automatically transfer from your PMS into Dfl, removing the need for manual enrolment directly on to the Dfl platform. When a patient is added to your PMS, their details flow securely into Dfl and patient surveys are sent automatically at the appropriate time.

You can then view:

- Individual patient survey responses (via the Dfl platform)
- Aggregated clinic-level outcomes and benchmarking (via the Dfl dashboard)

This integration is designed to reduce administrative burden and fit into routine clinical workflows.

One-off setup

You only need to complete this process once. After the API connection is set up, eligible patient details will continue to transfer automatically from your PMS into Dfl.

Data protection and GDPR

To reassure you and your patients:

- No clinical notes, treatment records, or free-text data are shared
- Only the minimum information required to enrol patients into Dfl and send surveys is transferred (for example: name, contact details, D.O.B and appointment details)
- All data are handled in line with GDPR requirements and the Dfl governance framework, hosted at Keele University

Important: eligibility filtering (why this matters)

Practice Management Systems may also include patients who should not be enrolled into Dfl, for example:

- Non-physiotherapy appointments in multidisciplinary clinics
- Non-MSK or non-eligible services

For this reason, part of the setup involves adding a simple eligibility filter in your PMS. This ensures that only appropriate patients are sent to Dfl, protecting data quality and avoiding inappropriate survey delivery.

As part of this process, we will guide you through:

- How to set up the API link
- Where to add an eligibility filter in your PMS (if applicable i.e. if you have patients who are not eligible for enrolment to the Dfl)
- How to label or flag eligible patients
- How to test the connection safely before going live

What happens after setup

Once connected and tested:

- Eligible patients are enrolled automatically onto the Dfl platform
- Patient surveys are sent without any additional administrative work
- Your clinic's data contribute to the national MSK evidence base
- You gain access to meaningful benchmarking and reporting via the Dfl dashboard

How to set up the API connection and eligibility filtering

Connecting your PMS to the Dfl platform involves two simple steps, regardless of which PMS you use:

1. Create an API key
This allows your PMS and the Dfl platform to communicate securely.
2. Set up eligibility filtering
This controls which patients are sent to Dfl, ensuring only appropriate physiotherapy patients are enrolled.

You only need to complete these steps once. Once the connection is live, the system will continue to work automatically in the background.

We have established API integrations with the following Practice Management System (PMS) providers, with plans to expand these integrations further in the future:

- Nookal (page 4)
- Cliniko (page 6)
- TM3 (coming soon)
- PPS (coming soon)

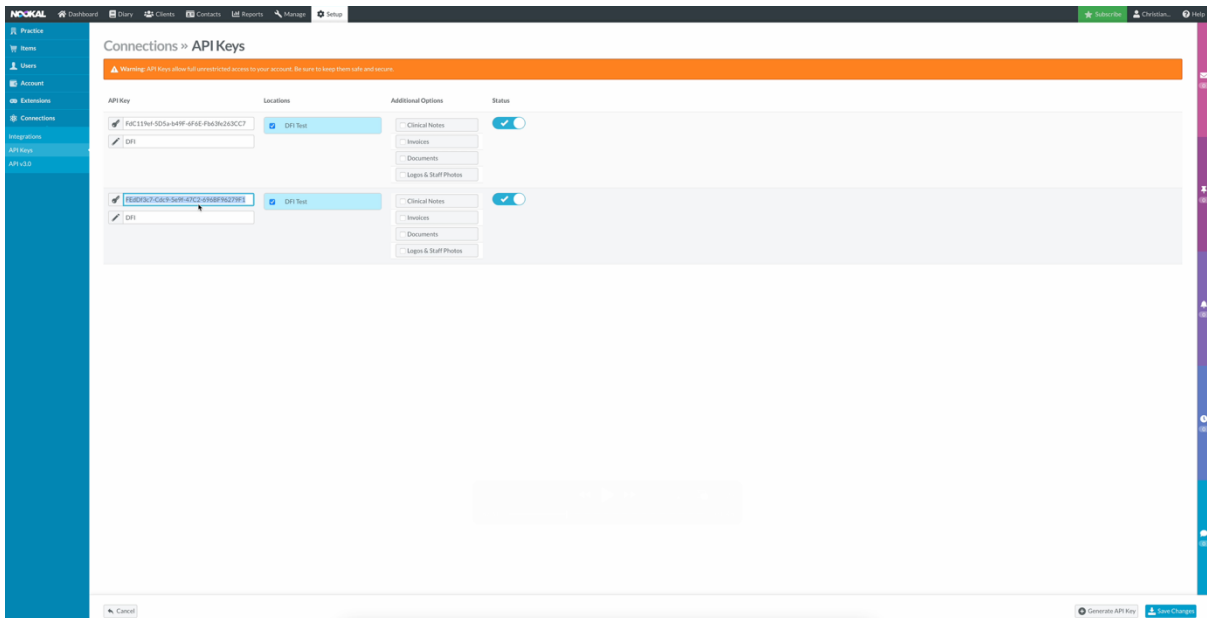
Please see the relevant pages and then information on how to test the API connection (page 9).

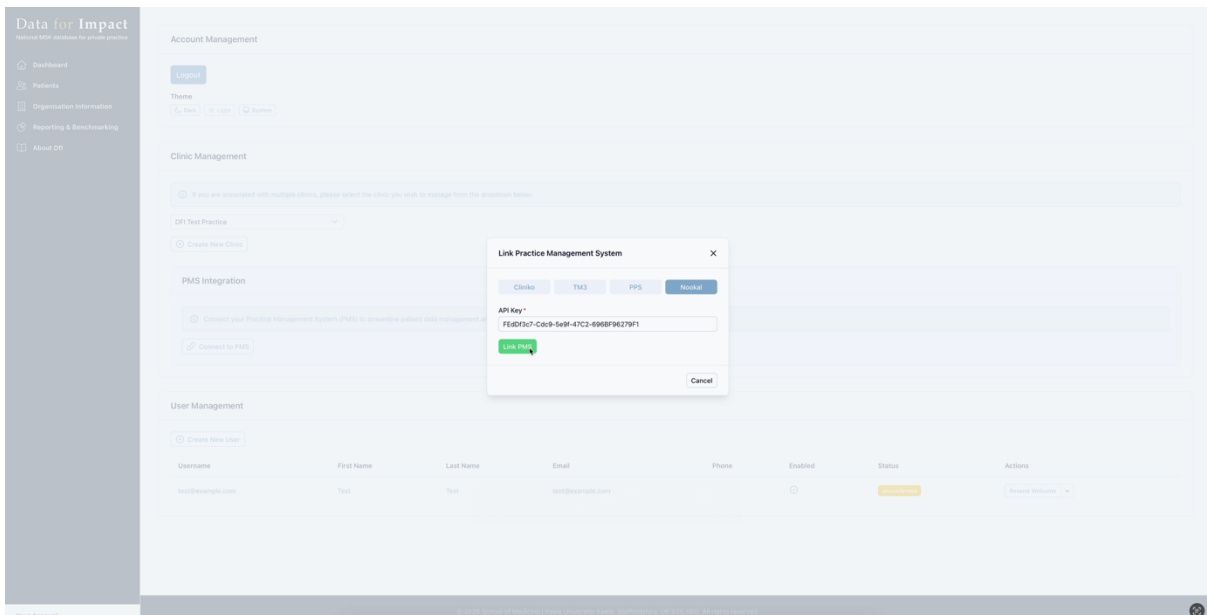


To link with Nookal

A. Create your API Key & Secret (Nookal)

1. Log in to Nookal using an Owner or Admin account
2. Go to Setup
3. Select Integrations
4. Open API Keys
5. Click New API Key
6. Name it:
"MSK Data for Impact"
7. Nookal will generate:
 - o API Key
8. Copy both values
9. Paste them into the Dfl PMS Integration form (see Account page; connect to PMS)

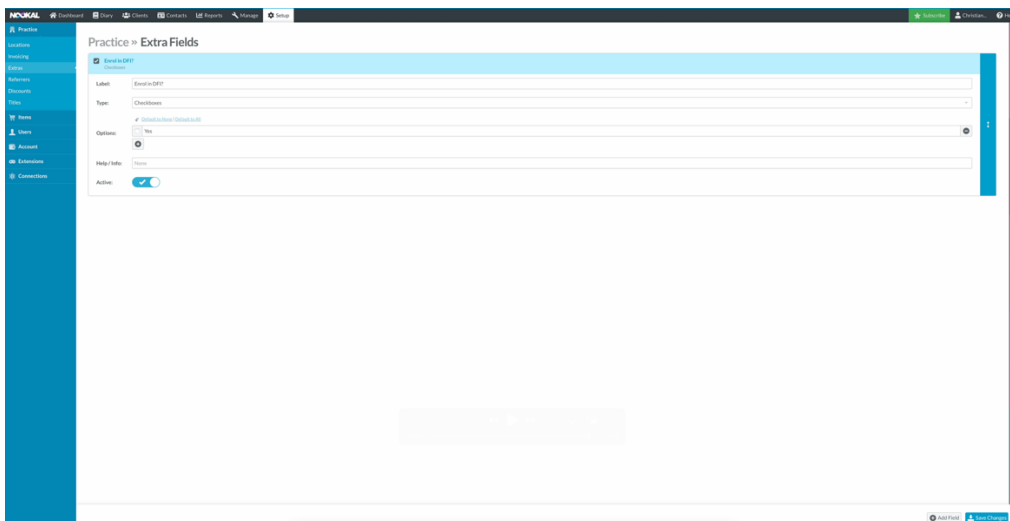




B. Set up eligibility filtering (Nookal)

In order to filter patients that whose details you don't want to be sent to DFI, follow the steps below.

1. Go to Extras on the practice settings.
2. Create an extra field with the type as "Checkbox" and the name "Enrol in DFI?".
3. Add one option with the value "Yes"



4. When a patient is enrolled into your PMS, you will now see a checkbox, which will need to be checked in order for patient and appointment data to be sent to DFI.

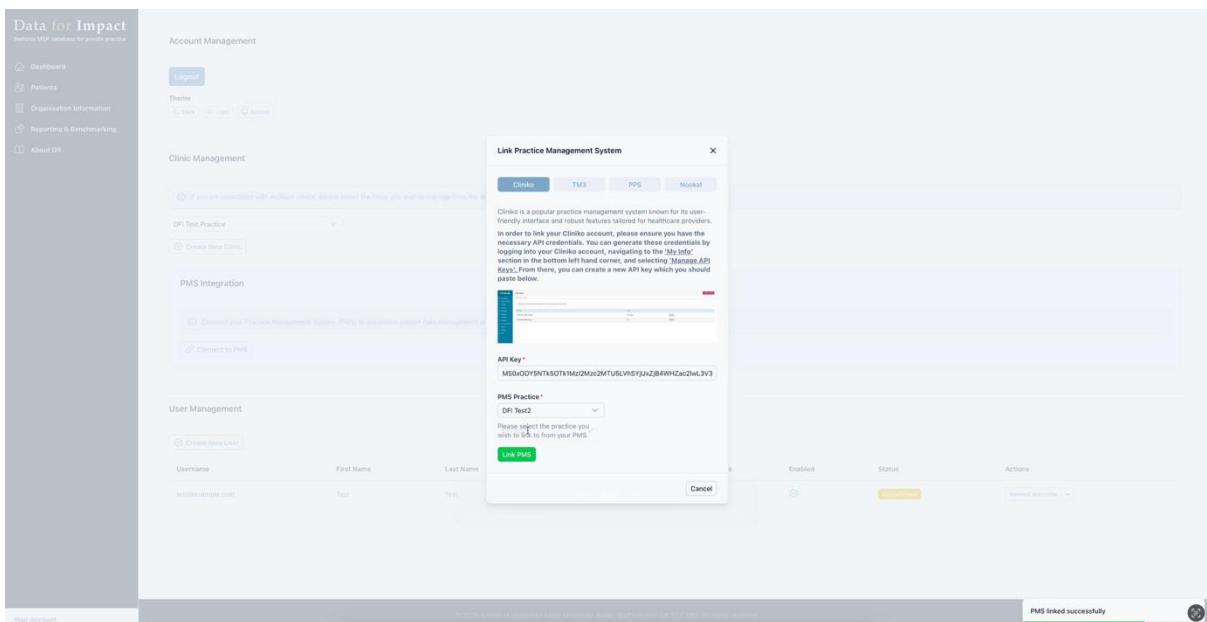
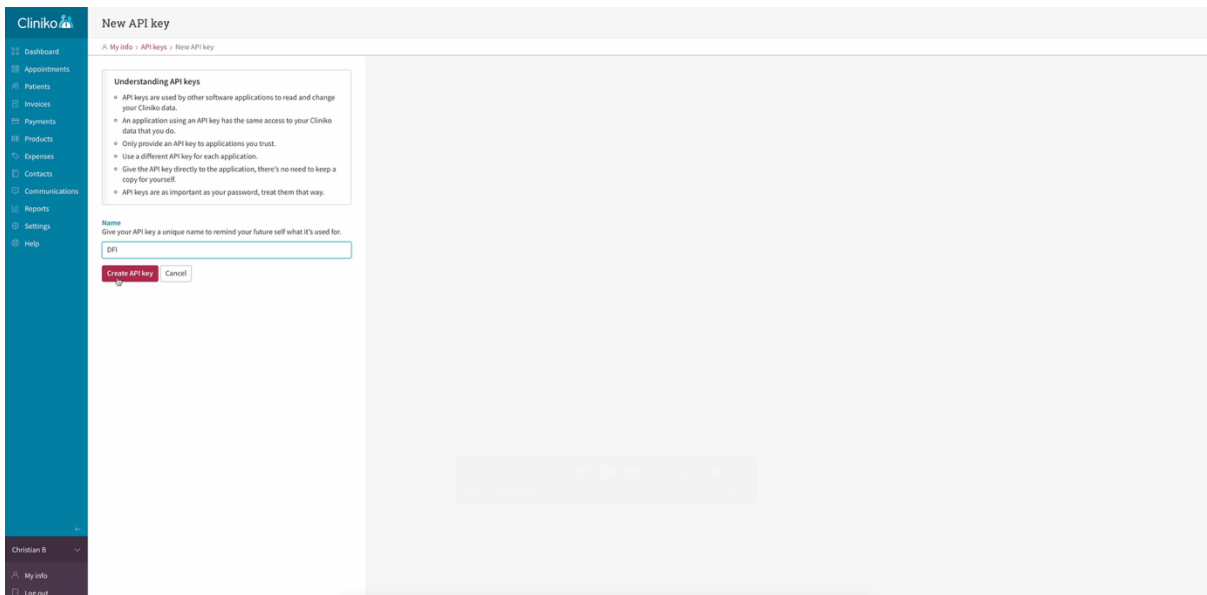


To link with Cliniko

A. Create your API Key (Cliniko)

1. Log in to Cliniko as an Administrator
2. Go to Settings
3. Select API
4. Click Add API Key
5. Name it:
“Data for Impact (Dfi)”
6. Copy the generated API key
7. Paste into the Dfi PMS Integration form (see Account page; connect to PMS). Once pasted, click “Link PMS” – you will then be asked which Practice you would like to link from your PMS.

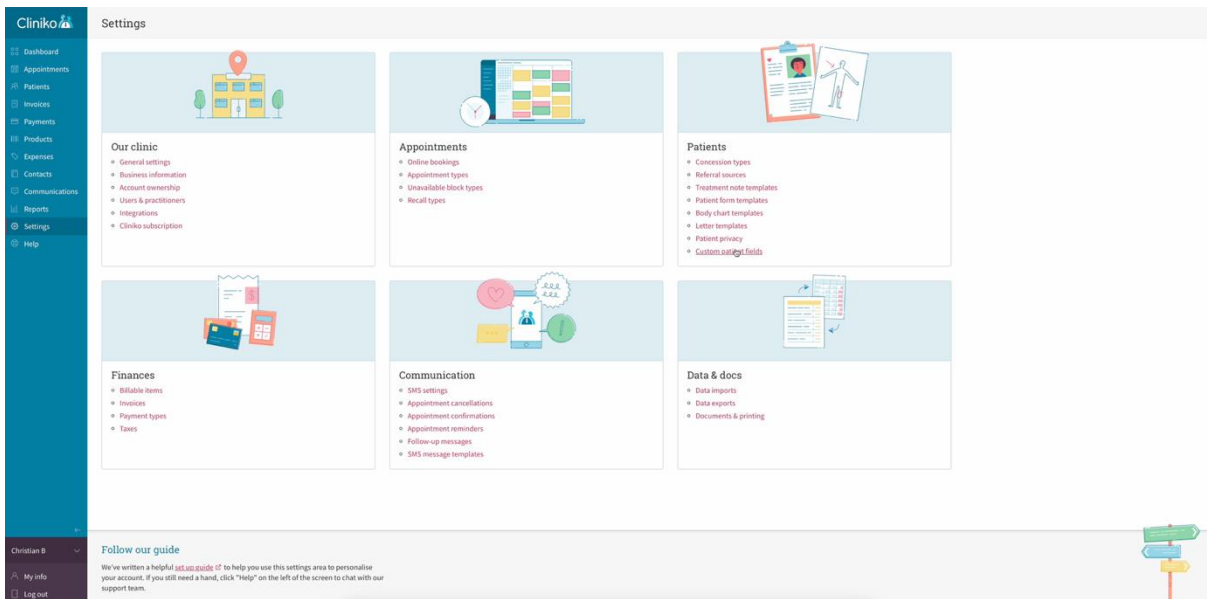
The screenshot displays the Cliniko user settings interface. On the left is a navigation sidebar with categories like Dashboard, Appointments, Patients, Invoices, Payments, Products, Expenses, Contacts, Communications, Reports, Settings, and Help. The main content area is titled 'Add your signature' and includes sections for '2 factor authentication is not enabled', 'Passkeys', 'You have 0 API keys', 'Tell your friends', and 'You are the account owner'. The 'API keys' section is highlighted, showing a 'Manage API keys' button. A green notification bar at the bottom right indicates 'Your details have been updated'.



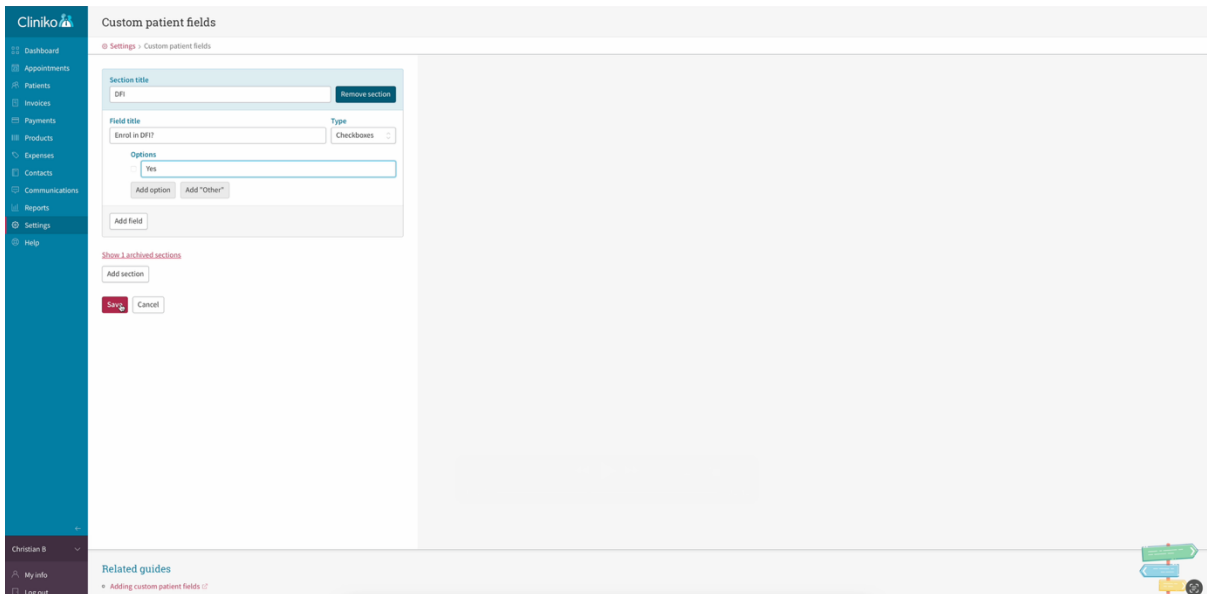
B. Set up eligibility filtering (Cliniko)

In order to filter patients that whose details you don't want to be sent to DFI, follow the steps below.

1. Go to "Settings" and click "Custom Patient Fields"



2. Create a new section called “DFI” and a new checkbox field called “Enrol in DFI”, with one option labelled “Yes”. Once complete, save the field.



3. When enrolling new patients in your PMS, you will now see a checkbox called “Enrol in DFI?”, which needs to be checked in order for DFI to receive patient and appointment data.

Testing before going live (all PMS)

Before fully enabling:

1. Create a test patient
2. Book an eligible physiotherapy appointment
3. Confirm:
 - patient appears in Dfl
 - surveys are sent correctly
4. Adjust filters if needed

We recommend testing with 1–2 patients before full rollout.

Need help?

If you would like:

- Further information then please contact the Dfl research team.