ChiroWrite

OCA'S CLINICAL NOTES SOFTWARE

DOCUMENTATION MADE FAST & EASY

USER GUIDE

We know chiropractic.

Table of Contents

ChiroWrite Overview

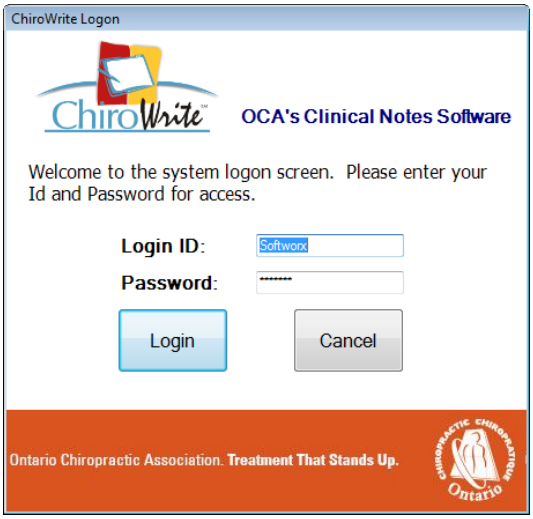
Chirowrite is the world's first Chiropractic reporting system designed for use with the Tablet PC component. The system can also be used on a desktop computer, laptop computer, or touch screen monitor. Doctors will be able to conduct physical examinations and complete forms and questionnaires in real time for their patients.

Chirowrite (CW) allows the doctor an easy way to record patient visits and exams so that SOAP Notes and Narratives can be easily produced. The software consists of all the medical questionnaires and forms that a chiropractor uses on a routine basis when conducting physical examinations. The system also has the ability to produce a comprehensive list of required reports based on the information input into the system.

System Login

Once you start the ChiroWrite program you will see the login screen as shown below.

1. Enter your **Login ID** and **Password**.



2. Select the **Login** button. See page 58 for detailed instruction on creating login ID's for users.

Setup Your System Settings

It is important to set up some of your ChiroWrite settings before you begin. Settings can be applied and edited at a later date.

- Most settings are configured under the **Administration** menu.
- Start with the **Treatment Configuration** - page 76
- Follow with **System Configuration** - page 71.

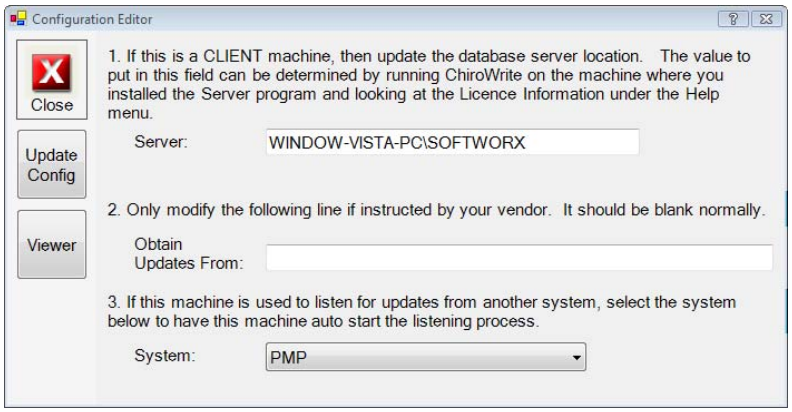
PMP Integration

ChiroWrite and PMP have integration features that simplify procedures and reduce duplication required in completing patient visits. The integration copies patient files from PMP into ChiroWrite. Patient name, address, gender, DOB, and phone numbers are transferred.

Configure ChiroWrite to Integrate with PMP

ChiroWrite has a “Listen’ option. This means that when patient information has been updated, new patients added, appointments marked as ‘Arrived’, and/or individually selected or group patient files are ready to be sent from PMP, ChiroWrite receives this information and will import it. If ‘Listen’ is not set up, ChiroWrite will not be updated as you update patient files in PMP.

To set up ChiroWrite to ‘Listen’ for go to the **Help** menu, **Update Configuration**. Under number **3**, click the drop down box and select **PMP** from the list. Click **Update Config** followed by **Close.**



Close and re-open ChiroWrite to enable this setting.

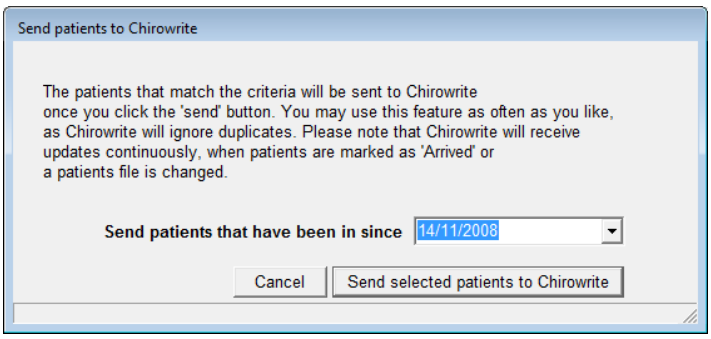
Transfer Patient Files

Below is a list of ways to transfer patient files to ChiroWrite:

- In PMP mark a scheduled patient appointment as ‘Arrived’. Once a scheduled appointment in PMP has had the status changed to ‘Arrived’ the patient name will appear under the **Current Patients** menu in ChiroWrite and a new file will be created if it did not previously exist in CW
- Utilize the **Export to ChiroWrite** function from the **Utilities** menu in PMP
- Add a New Patient to PMP
- Update \ Edit patient information in the PMP Personal tab
- Select the Send to CW button in the patient information screen in PMP.

Transferring a Group of Patient Files

Patient files can be transferred from PMP by using the **Patient Export to CW** function from the **Utilities** menu in PMP. This function will transfer all patient files that have had a visit posted on or after the date selected. In the field ***Send patients that have been in since,*** select the date using the drop down calendar. This function can be used as often as you choose to update CW with new patient files. Using this function will not erase existing CW data but it will update the patient's personal information.



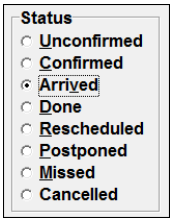
Transferring Patient Files using 'Arrived' Method

ChiroWrite creates a list named **Current Patients** where patient files are easily accessed once a patient has been marked as '**Arrived'** in PMP. To use this feature you must have PMP open and be using the on-screen appointment book.

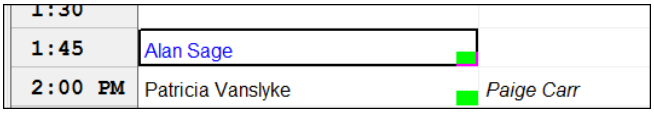
There are two ways to mark a patient '**Arrived'** in PMP:

- position the cursor on the patient name using the keyboard arrow keys and then press the hotkey A on your keyboard.

- select the patient and select the *Status* **Arrived**

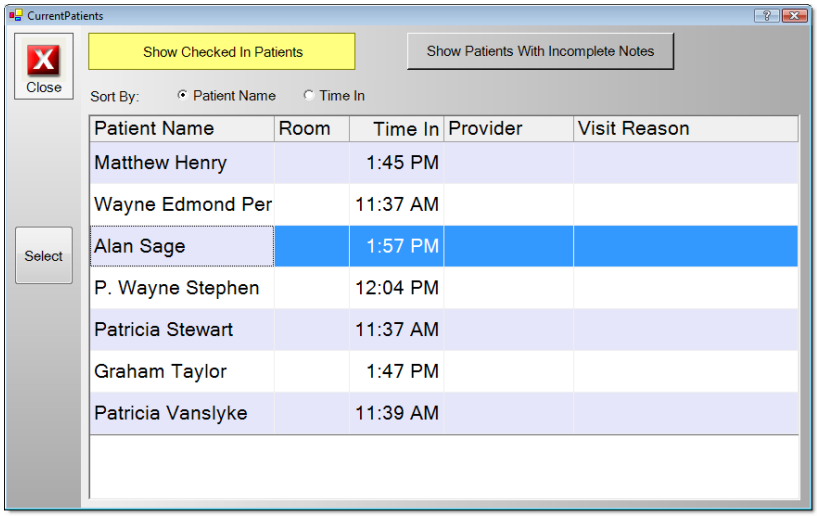


The patient name on the appointment book will turn blue.



Current Patients - Accessing 'Arrived' Patients in ChiroWrite

In ChiroWrite, select the **Current Patients** menu. 'Arrived' patients appear in the list. Select or touch the patient name followed by the **Select** button.



Show Patients with Incomplete Notes

If you were unable to complete a patient SOAP note or Examination you are prompted with the screen above asking if the notes is complete. By choosing *No, Flag these notes for follow up later* a record of the patient visit is copied into the Current Patients menu under the button **Show Patients with Incomplete Notes**. Here you can access patient files to complete notes in progress.

This area also lists patients where the status was changed in PMP from 'Arrived' to 'Done' and the visit was not started in ChiroWrite. Visits that have not been started will be marked with asterisks under the Provider and visit reason columns. Notes that are incomplete will have provider and visit reasons populated.

Incomplete notes will remain until completed. Visits <u>not</u> started can be deleted by selecting the patient followed by the **Remove** button.

Additional PMP Patient File Transfer Options

▪ Add a New Patient to PMP

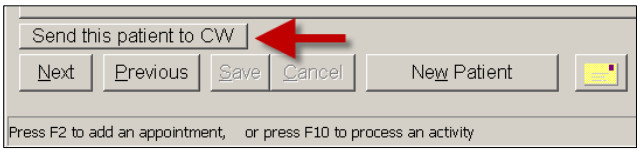
Adding a new patient to PMP will automatically import their file into ChiroWrite.

▪ Update \ Edit Patient Information in PMP

Updating patient information on the Personal tab in PMP will add the patient to CW or update the patient CW file if the patient already exists.

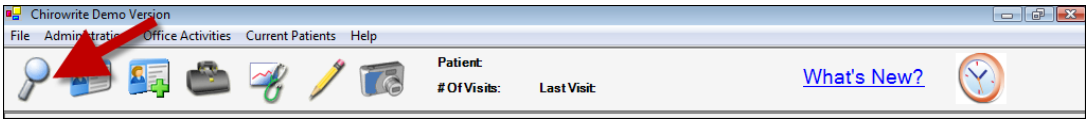
▪ Send this patient to CW

This button is visible in the Patient Information screen on the bottom left. Select it to automatically send this patient file to ChiroWrite.



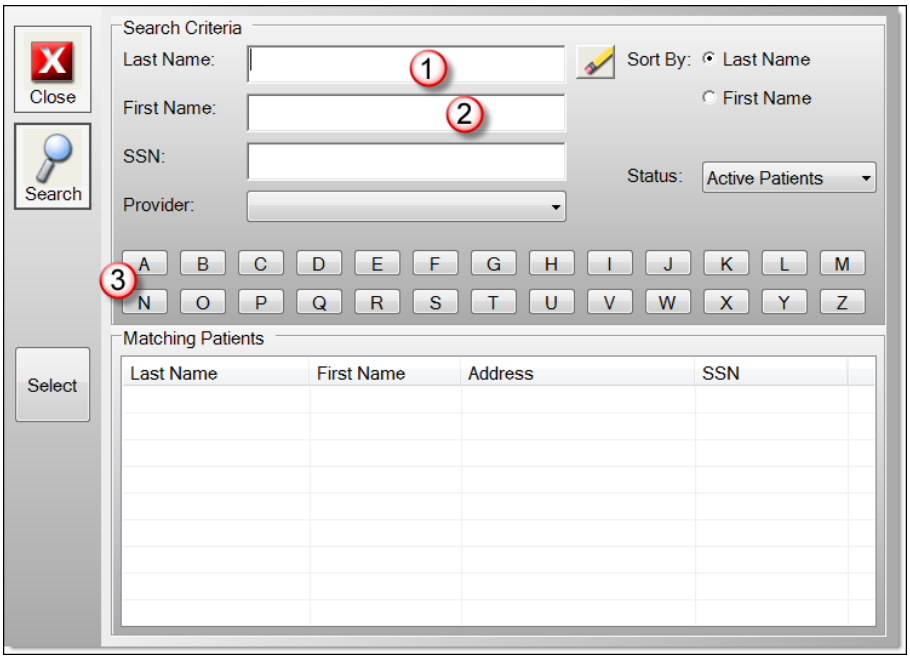
Accessing Patient Files in ChiroWrite

Touch the **Search** icon from the toolbar.



Once the *Search Criteria* screen appears, you can:

1. type part or all of the last name
2. type part or all of the first name
3. select the corresponding letter on the keypad.

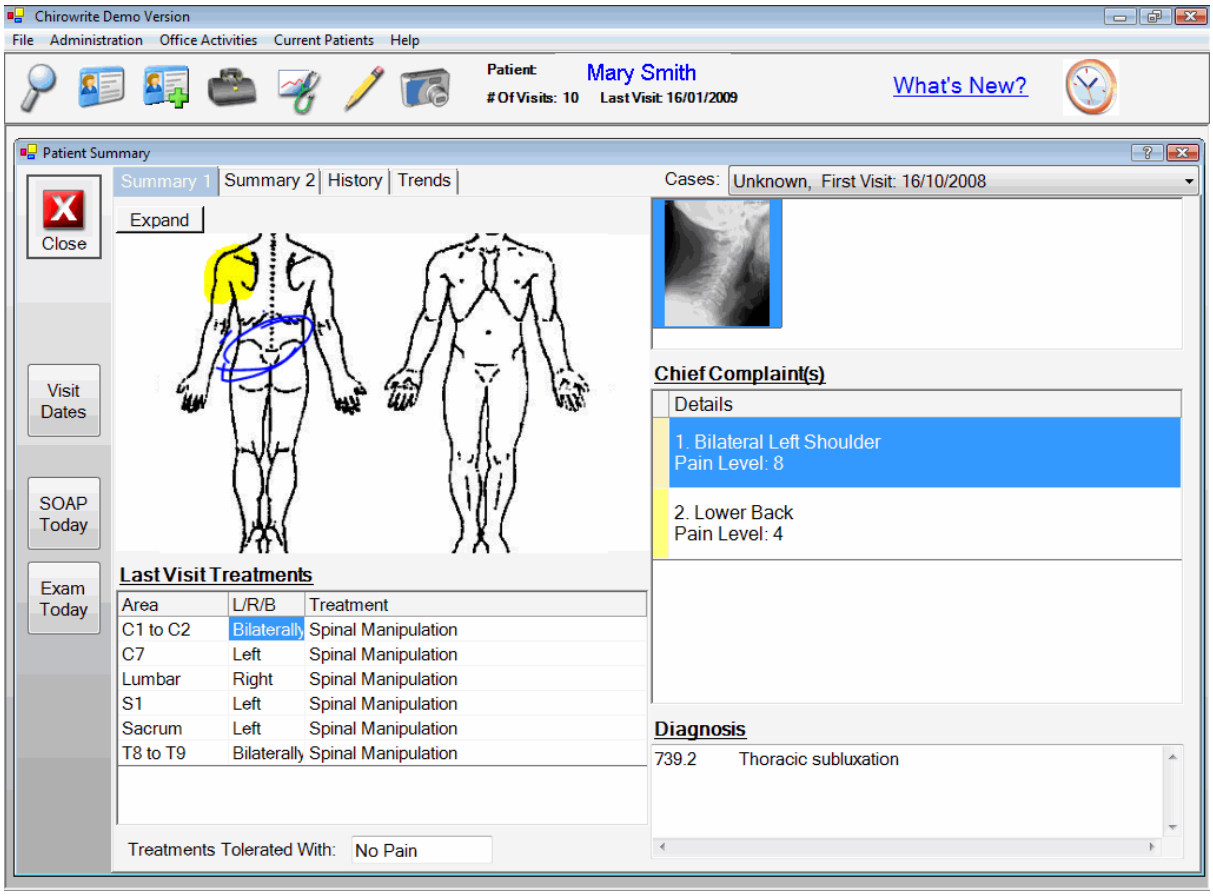


Choose the *Sort By:* method and *Status:* if applicable. Touch **Search**. Touch the correct patient in the list followed by **Select**.

☑ PMP users using the appointment scheduler should access patient files from the Current Patient menu. See page 9.

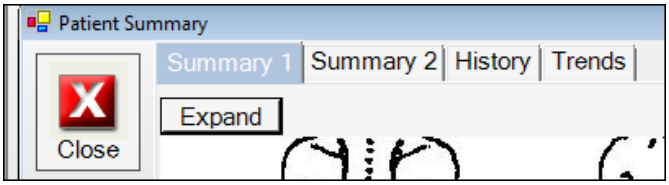
Patient Summary Screen or Travel Card

The Patient Summary screen houses pertinent information regarding your patient's condition and treatments. Information on this screen is summary data and is not populated by typing into these fields. The Summary screen gives you to access to information on the patient's visits, SOAP, and regular exams.



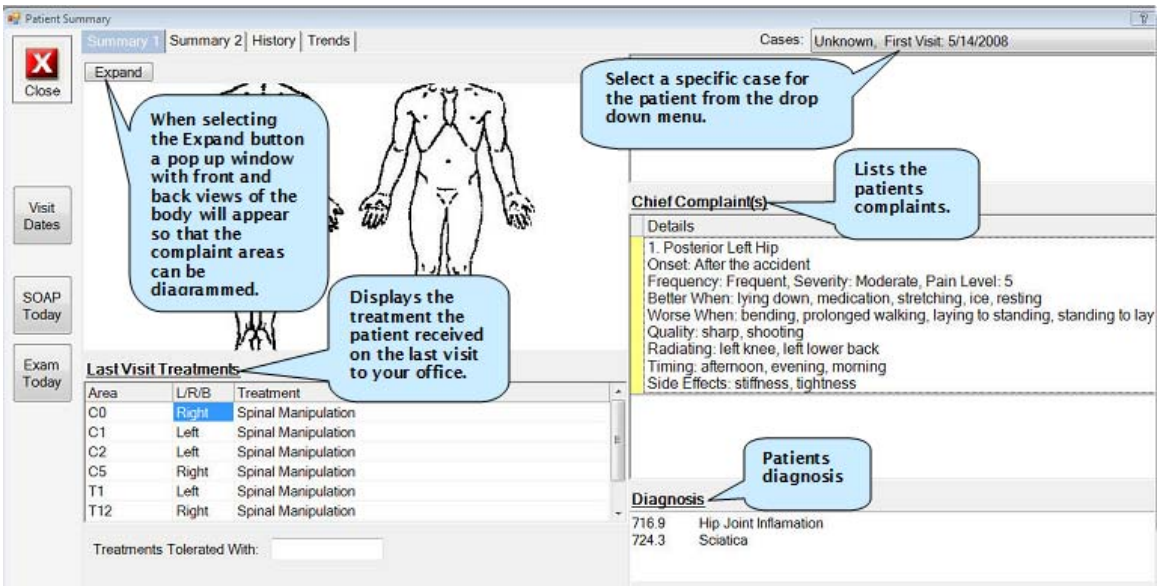
Summary Tabs

The Summary tabs consists of four areas: Summary 1, Summary 2, History, and Trends. Summary windows provide a snap shot overview of the patient's information.



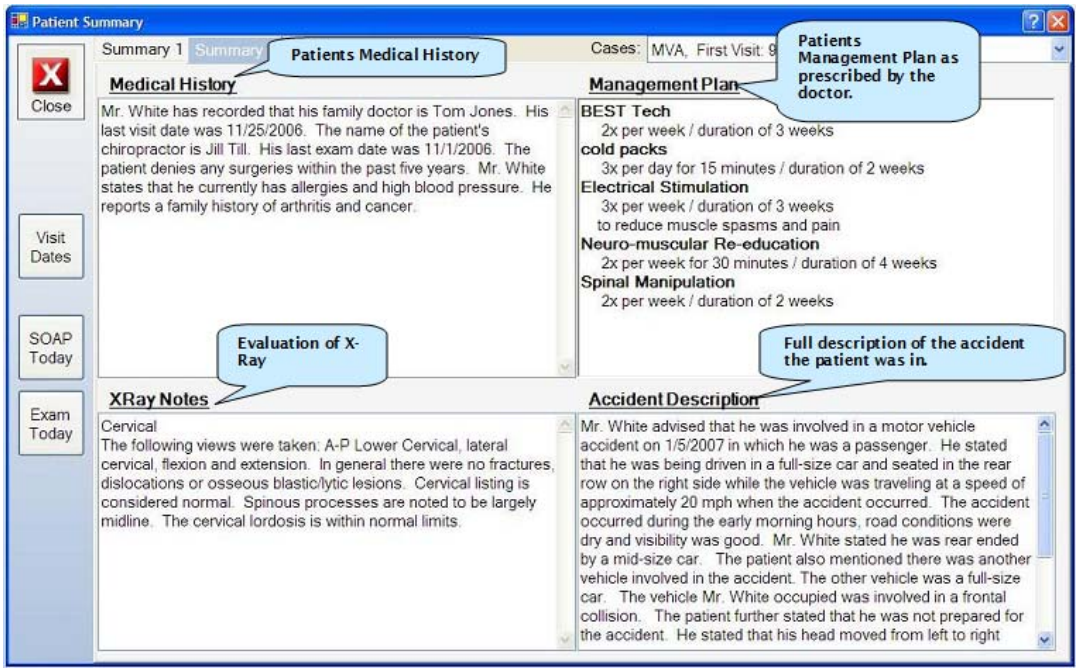
Summary 1

The Summary 1 tab will allow you to expand the front and back images, read patient complaints, treatment and diagnosis information.



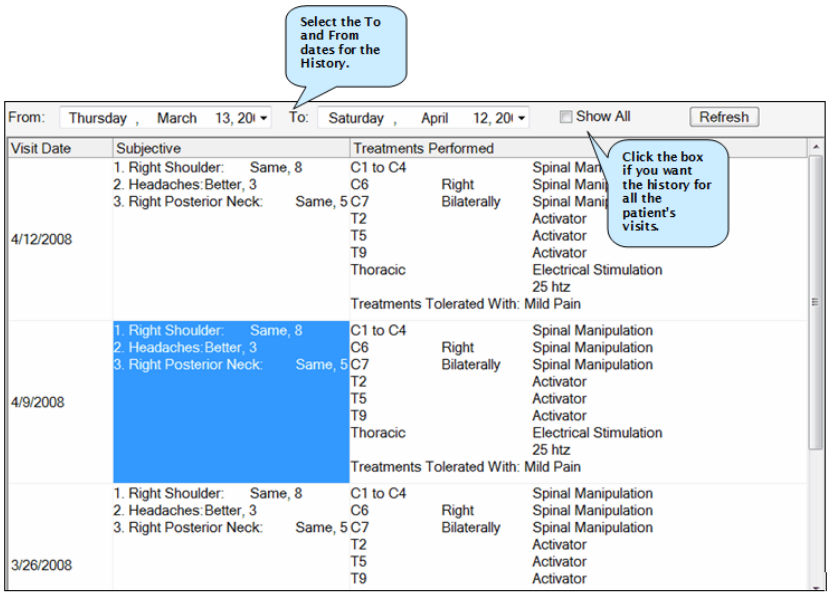
Summary 2

Summary 2 allows you to view the patient's medical history, x-ray notes, management plan, and accident description.



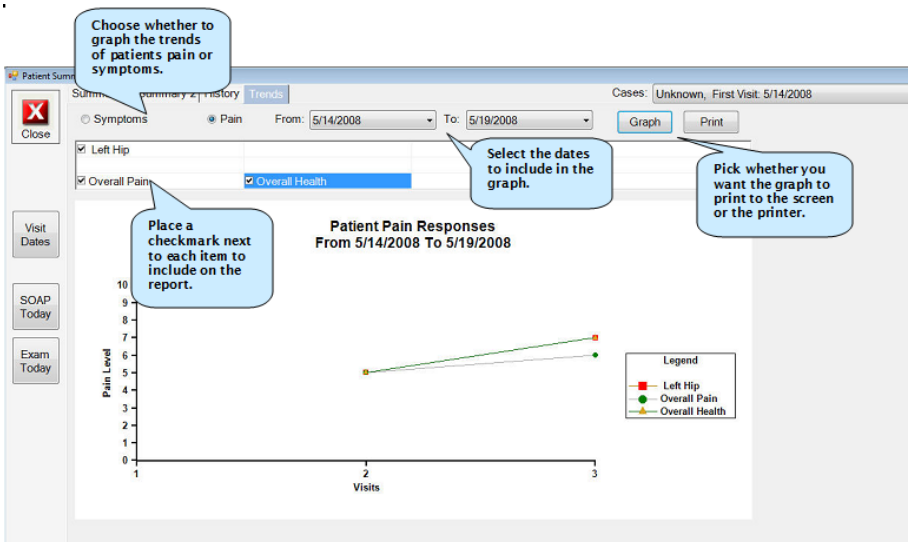
History

History provides access to the patient's subjective notes and treatments performed for the block of time selected, allowing the doctor to see treatments they have been performing over a period of time and the patient's responses to the treatments.



Trends

Trends allows you to view the patient's progress under chiropractic care using graphical representations. The graphs are generated based on the subjective responses the patient has been giving over the date range specified. The graph can be generated for either Symptoms (Better/Same/Worse)or Pain Scale (1-10 ratings.)



Summary Buttons

The left side of the Patient Summary screen has buttons for **Close, Visit Dates, SOAP Today,** and **Exam Today.**

Visit Dates

The Visit Dates button offers a calendar that highlights in bold the dates that the patient has visited the office.

SOAP Today

The **SOAP Today** button will allow you to detail today's treatment and notes. The system will take you into the SOAP Worxflow.

☑ After the first SOAP note has been completed for a patient, the next note added will automatically include all previous information. This means that only different findings and treatments need to be noted and/or removed.

SOAP Icons

The *Subjective* window appears with the SOAP template on the left and the following icons listed above:


allows you to edit case information


displays the summary information


allows you to add visit notes


allows you to apply the defaults to selected screens

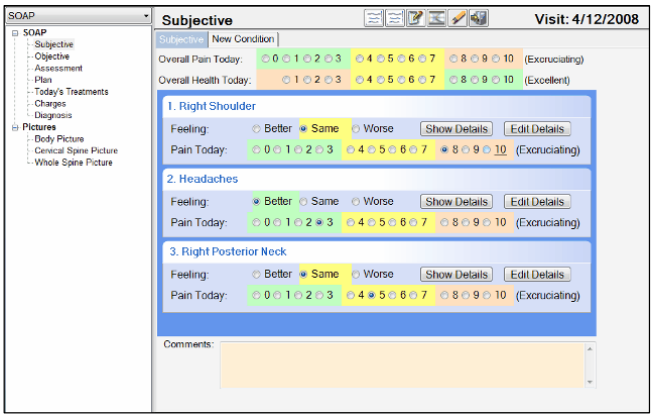

erases the contents of a field


allows you to exit the SOAP

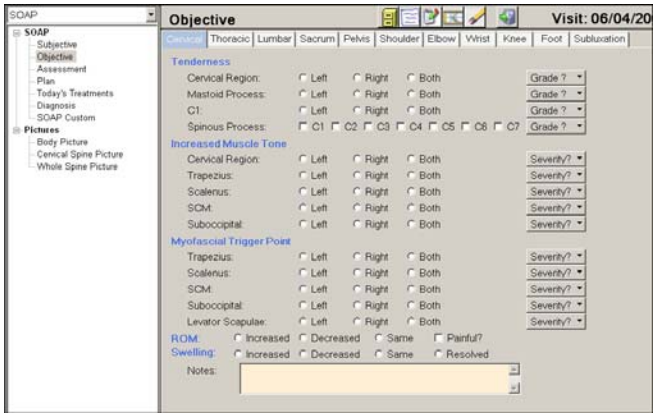

allows you to delete the contents of the current screen.

Utilize the SOAP template menu or the arrows at the bottom of the screen to move ahead, back or to cancel changes and reset the form.

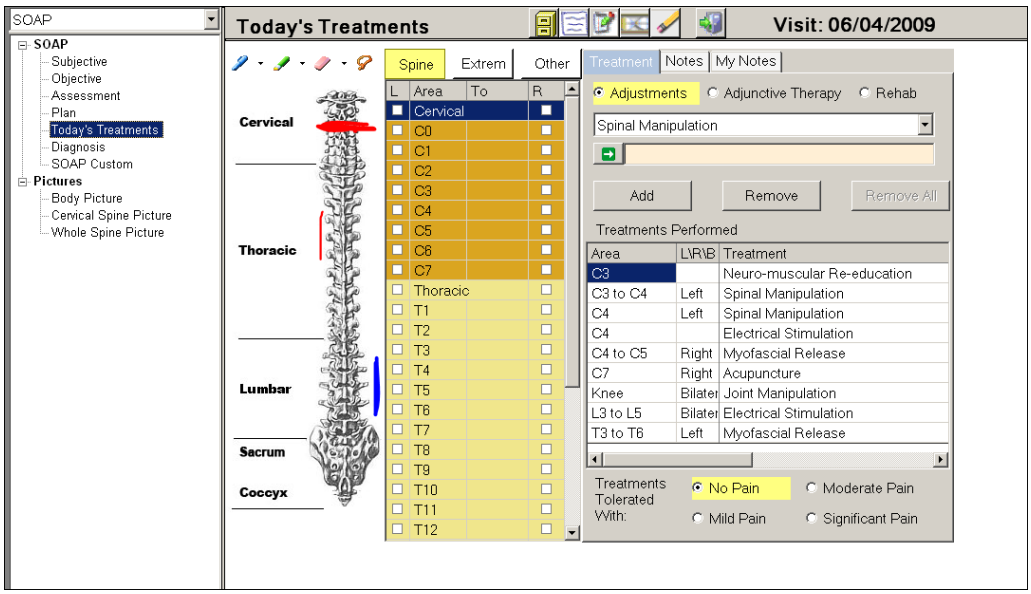
The **Subjective** section details the patient complaints and also offers a *New Condition* tab.



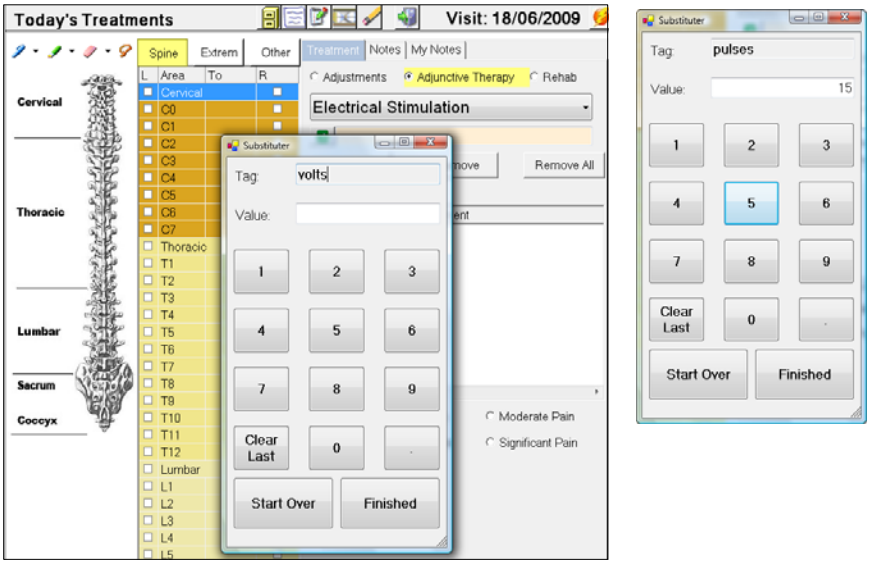
The **Objective** tab contains tabs for different areas. Only highlighted tabs have information for this patient.



Today's Treatment has a spine diagram that you can draw on and highlight. The vertebral details in the middle are where you touch or select to detail areas of treatment. To the right are the pre-defined treatments that you set up in Treatment Configuration. Select Adjustments, Adjunctive Therapy, or Rehab and choose the correct treatment from the drop down menu.



If 'dynamic tags' were added to your treatments you may see the Substituter screen when choosing an Adjustment, Adjunctive Therapy, or Rehab type. The Substituter screens allow you to input accurate information in a simple, timely manner.



Select the correct information from the Substituter screen and press **Finished**.

The highlighted area shows how the numeric dynamic tags populate your printed SOAP notes.

Antoinette Bradshaw
1097 1/2 Davenport Rd
Willowdale, ON M2R 2X7
Date of Birth: 24/01/1936

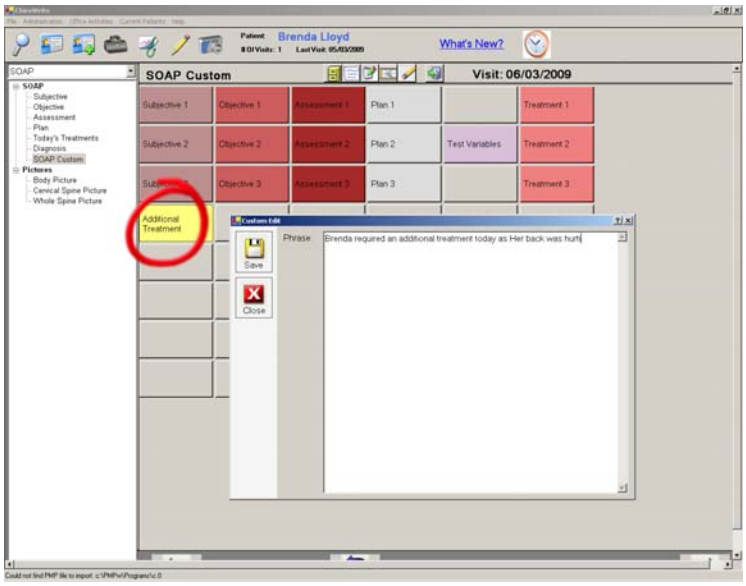
SOAP Notes - Detail

18/06/2009

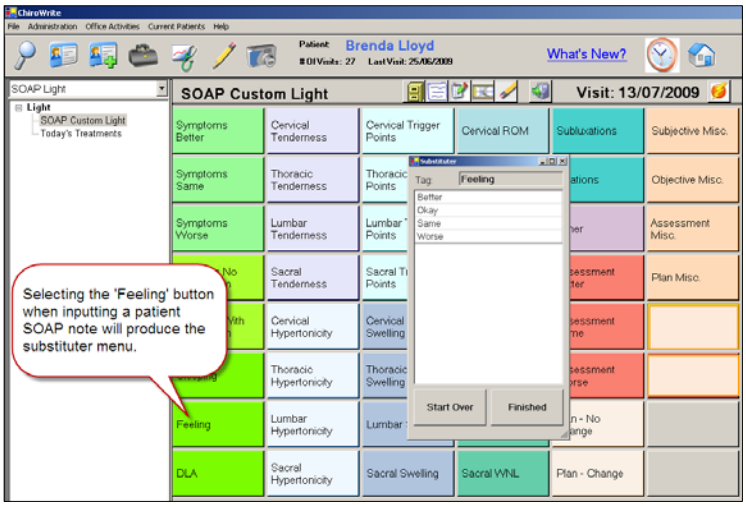
Subjective Complaint
Ms. Bradshaw was examined today to determine progress with the current treatment plan.

Today's Treatment
The patient was treated with Electrical Stimulation (80-120 freq @ 12x3, volts/pulses) on the mid back; spinal manipulation at C1, at C3 on the left, at T2 on the left, at T10 on the right, at L2 and at L4 on the right.

SOAP Custom offers buttons with pre-defined information that will populate your notes with information you created. Select the button of choice. To set up Custom buttons follow the instructions listed on page 50.



Selecting a button that has been correctly set up will produce a Substituter menu that simplifies the input of SOAP notes or treatments.



The highlighted area on the screen shot shows the detailed SOAP note generated by choosing the custom button with Substituter menu.

Brenda Lloyd
85 Henry Lane Terrace
Hamilton, ON L8E 1L6
Date of Birth: 25/02/1972

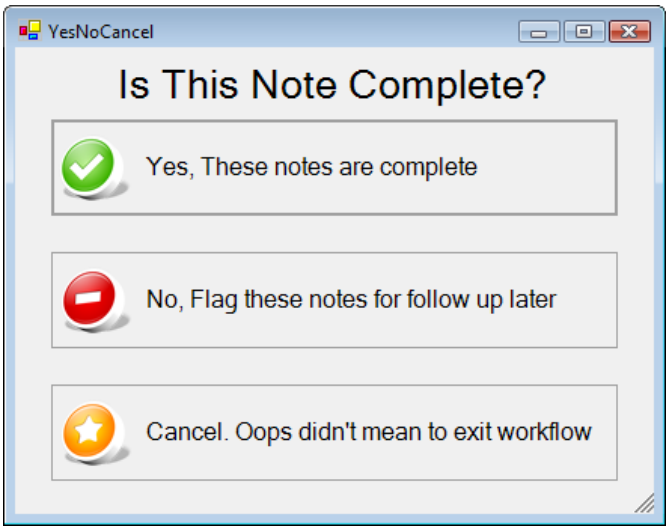
SOAP Notes - Detail

18/06/2009

Subjective Complaint
Ms. Lloyd overall response to the treatment plan was evaluated today. The following is the patient's subjective response to the question regarding her pain levels: Overall pain level today, on a scale of 0 (no pain) to 10 (unbearable pain), is considered a 6. The patient reported that her overall health on a scale of 1 to 10 is rated as a 4. On a scale of 0 to 10 with 10 being the worst, she rated her headaches as a 5. Brenda noted she was feeling better today.

Objective
Palpation of the lumbar spine revealed left paraspinal tenderness. Examination of the lumbar region revealed hypertonicity of the left iliocostalis. Tenderness was palpated in both tibiofemoral joints. Tenderness was elicited in the left popliteal fossa.

Touch or select the **Exit Worxflow** button when finished. You will be prompted to answer the question below. If you choose *No, Flag these notes for follow up later* the visit will appear in the **Show Patients with Incomplete Notes** screen, details can be found on page 9.



☑ If this screen does not appear, go to the **Administration** menu, **System Configuration, Defaults, Global 3.** Where you see *On Exit, ask if notes are complete*, choose **Always**.

Exam Today

The **Exam Today** button will take you into the Exam Worxflow. The *Complaint* window appears with the Standard Template on the left and the following icons listed above:


allows you to edit case information


displays the summary information


allows you to add visit notes


allows you to apply the defaults to selected screens

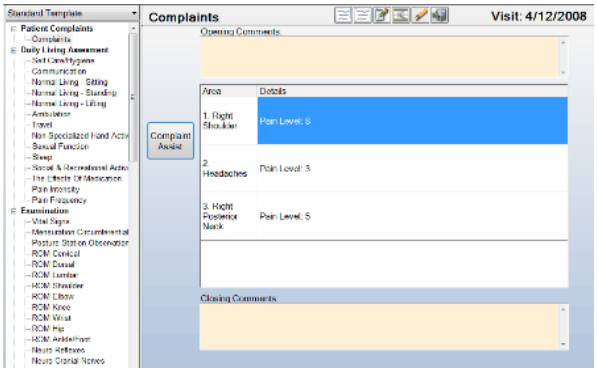

erases the contents of a field


allows you to exit the Exam


allows you to delete the contents of the current screen.

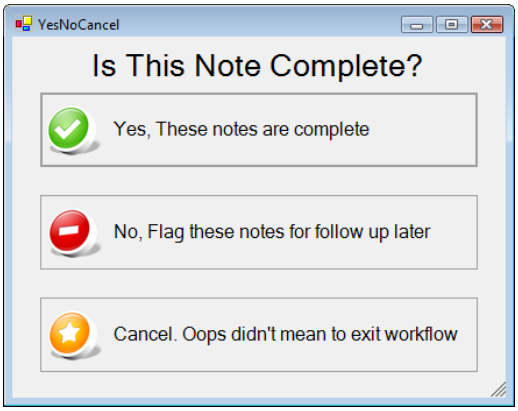
Utilize the *Standard Template* menu on the left or the arrows at the bottom of the screen to move ahead, back or to cancel changes and reset the form.

Select the **Complaint Assist** button to add or edit information.



☑ Enter information in the Opening and Closing sections in complete sentences.

Select or touch the **Exit Worxflow** button when you have finished inputting your exam findings. You will be prompted to answer the question below. If you choose *No, Flag these notes for follow up later* the patient's name will appear in the **Show Patients with Incomplete Notes** screen, details can be found on page 9.



☑ If this screen does not appear, go to the **Administration** menu, **System Configuration, Defaults, Global 3.** Where you see *On Exit, ask if notes are complete*, choose **Always**.

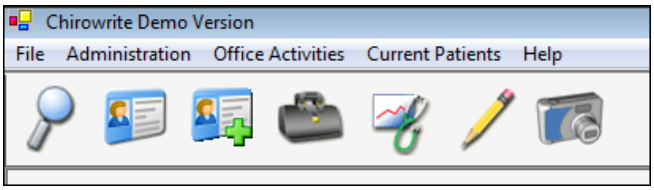
If you were unable to complete a patient SOAP note or Examination you are prompted with the screen above asking if the notes is complete. By choosing *No, Flag these notes for follow up later* a record of the patient visit is copied into the Current Patients menu under the button **Show Patients with Incomplete Notes**. Here you can access patient files to complete notes in progress.

This area also lists patients where the status was changed in PMP from 'Arrived' to 'Done' and the visit was not started in ChiroWrite. Visits that have not been started will be marked with asterisks under the Provider and visit reason columns. Notes that are incomplete will have provider and visit reasons populated.

Incomplete notes will remain until completed. Visits not started can be deleted by selecting the patient followed by the **Remove** button.

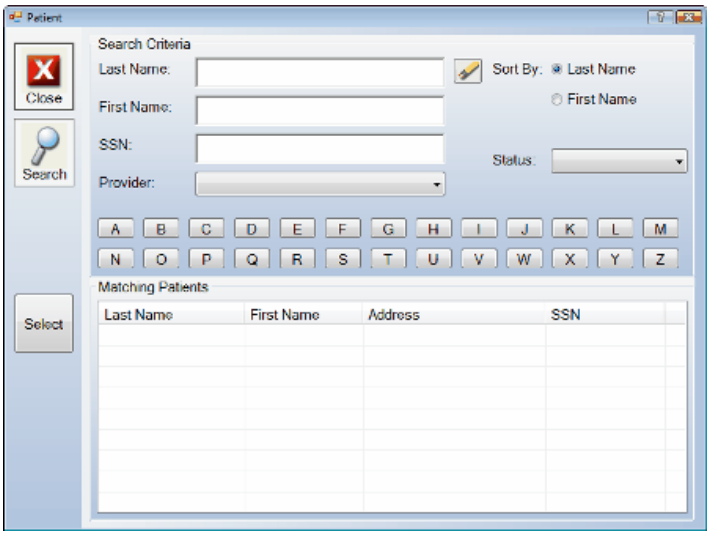
Toolbar Icons

Toolbar icons allow you to search for patients, edit patient information, and add new patients to the ChiroWrite system if you are not integrating with PMP.



Search for Existing Patients

1. Select the  button and the *Patient* search window will display.



2. The system allows you to search using Last Name, First Name, Provider, and Status.

   To search for the information, you can either type the information into the search window, select the **Search** button or select the letter button to pull all records for that particular letter.

   If you need to erase the contents of a search window you can select the **Eraser** button to delete what was typed in the field.

3. Once in patient names show under the Matching Patients window, highlight the patient's name.
4. Choose the **Select** button and the patient's record will display. You will also notice as shown below that the patient's name, number of visits, and the date of his/her last visit is displayed on the toolbar.

Edit Patient Information

1. Select the  on the toolbar to edit a patient's information.
2. The patient's record will appear on two pages. Make any necessary changes and select **Save.**
3. Select **Close**.

☑ PMP Users: Patient information will be updated in ChiroWrite automatically when updated in PMP. However if you update patient information in ChiroWrite, PMP will **not** be updated.

Add New Patient Information

☑ PMP Users: Do **not** add new patients to ChiroWrite. When new patients are added to PMP they are automatically transferred to ChiroWrite.

1. Select the  button.

☑ The Title, First and Last Names are required to add a patient record.

2. The new patient window will display with two pages. Fill in the information necessary and select **Save**.

3. Select **Close**.

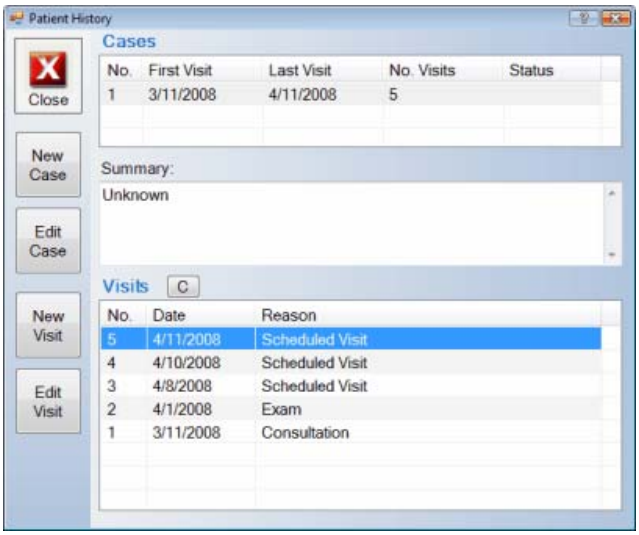
History

The History option allows you to record the patient's history by starting a new case and filling in information regarding the accident or injury. A case is a condition/situation for which a patient is being treated. Cases could include a WSIB claim, automobile accident, or new condition. By using cases your notes can be sorted by condition or accident showing only relevant information.

Add a New Case or Edit Case Information

1. Search for the patient.

2. Select the  button to display the Patient History screen as shown below. Existing cases will be listed in the top portion of the window.



2. If you have not input any patient history, Case No 1 will be highlighted waiting for input. Select the **Edit Case** button. If you are starting a new condition or accident choose the **New Case** button.

The *Edit Existing Case* screen will appear with six different tabs that should be all be completed. These tabs are explained below.

- Main
- History
- Accident Description
- Misc.
- Summary
- Final Notes

Main Tab

Select the **Main** tab. Enter all the patient information in this window.

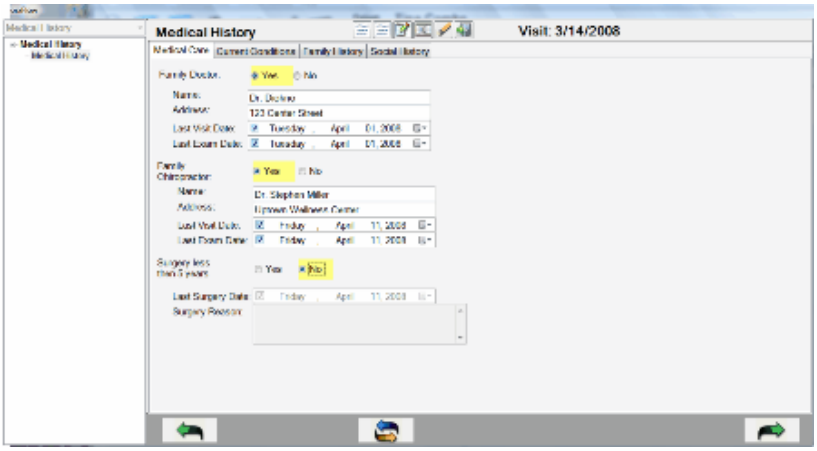
History Tab

Select the **History** tab.

1. Enter a **Medical History Opening** if you would like any customized information to appear on the report.

☑ Information entered in the Medical History Opening and Closing sections should be written in complete sentences.

2. Select the **History Assist** button to display the Medical History form.



3. Fill out the information on the **Medical Care** tab.
4. Select the **Current Conditions** tab and select the appropriate items.
5. Choose the **Family History** tab and enter the information.
6. Move to the **Social History** tab and enter the appropriate information.
7. Select the **Exit Worxflow** button and you will find a custom paragraph summarizing the information input into the system. *(IMPORTANT: Make sure that you do not type anything where the custom paragraph appears.)*
8. Enter a **Medical History Closing** if you would like any customized information to appear on the report. Information is automatically saved so you can now move on to another tab to enter information.

Accident Description Tab

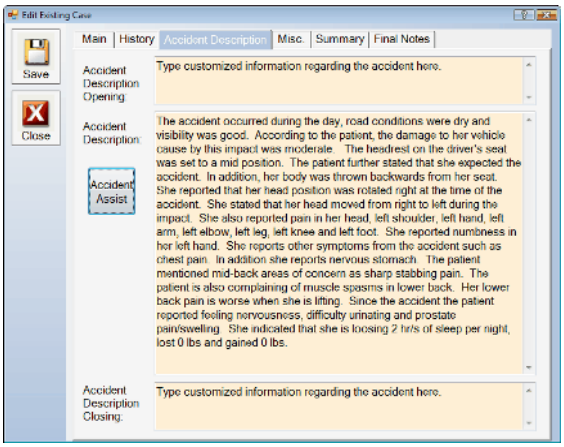
Select the **Accident Description** tab.

1. Enter a **Accident Description Opening** if you would like any customized information to appear on the report.

☑ Accident Description History Opening and Closing sections should be written in complete sentences.

2. Select the **Accident Assist** button.
3. Enter Accident and Post Accident information on the four *Car Accident* tabs.

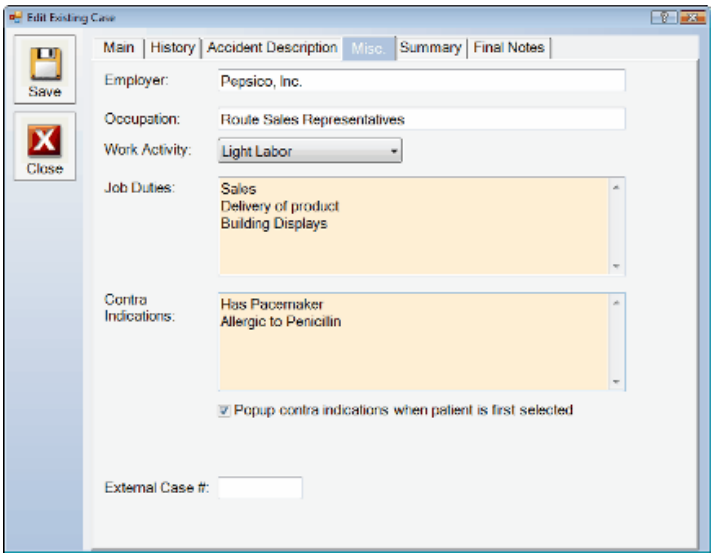
4. Select the green arrow in the bottom right to advance to the next section.
5. Input *After Impact* information on selected tabs.
6. Select the green arrow again to advance to *Later Symptoms*.
7. Complete the four pages as necessary.
8. Select the Exit Worxflow button . You should now see a custom Accident description.
9. Enter an Accident Description Closing if you would like any customized information to appear on the report.



Misc Tab

Select the **Misc** tab. Enter all available information.

If you have entered Contra-indications, you can have them pop-up when the patient record is loaded by placing a checkmark in the box.



Summary Tab

The Summary tab allows you to draw and write on the front and back profiles to indicate areas that are troubling the patient. As you can see from the example below the neck and lower back region are highlighted as problems for this patient.

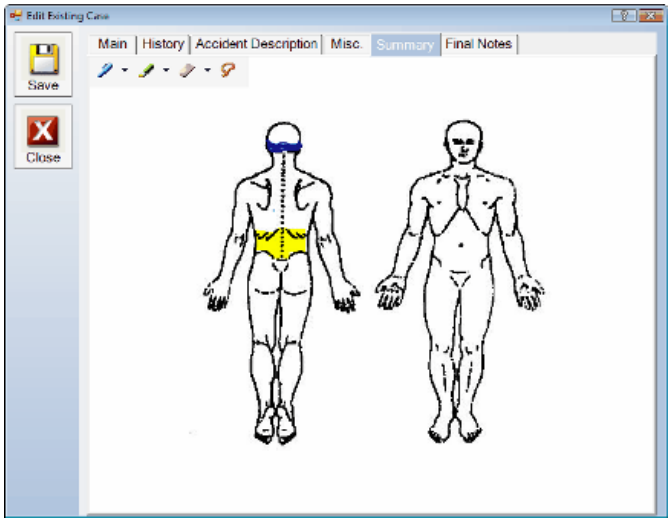
The drawing tools built into the software are the:

Pen (tool in blue): You can adjust the color, size, tip, transparency, and smoothness by selecting the drop down arrow next to the pen icon. You can then draw and write anything on the profile.

Highlighter (tool in green): You can adjust the color, transparency, tip, size, and smoothness by selecting the drop down arrow next to the highlighter icon. You can then highlight any area on the profile.

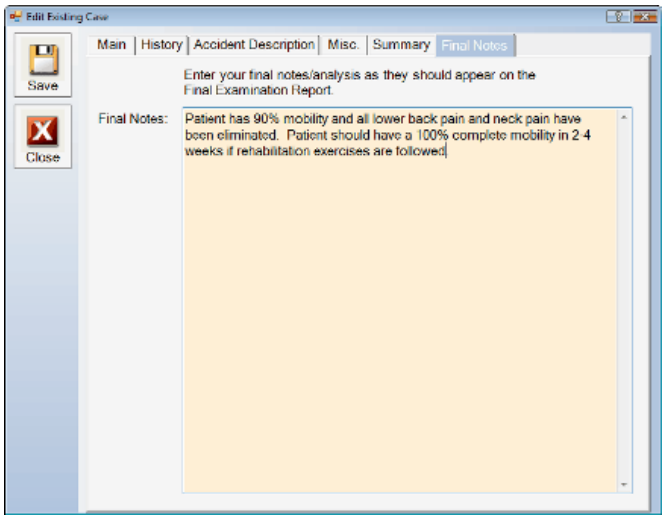
Eraser (tool in pink): You can select the mode and size of the eraser by selecting the drop down arrow next to the eraser icon. You can then erase any markings you have made.

Lasso (tool in orange): You can draw around a large area with the lasso tool and it will then create a box around that area. You can use this to move the marking to a different area on the screen.



Final Notes Tab

Select the **Final Notes** tab. Enter any final notes or analysis that you would like to appear on the patient's Final examination report.



☑ Final Notes should be written in complete sentences.

Select **Save**, then **Close**.

Add a New Visit

Only use this function to add a second visit for the same day or previous day's visit not yet recorded. Current visit information should be added with SOAP Today and Exam Today buttons. See pages 14 and 19 respectively.

1. Search for and select a patient.
2. Select the  button to display the Patient History screen.
3. Choose the **New Visit** button.
4. If the patient has previous visits you will be prompted to copy a prior visit. If you want to copy a prior visit select the the visit followed by the **Copy** button, then **Close**. If you want to create a new visit without copying a prior one, just choose **Close**.
5. The *Add New Visit* window will appear. Select the date of the visit using the calendar button as shown below.

6. Select a **Visit Reason** from the drop down menu. The visit options are:
   - Consultation
   - Exam
   - Final Exam
   - Initial Exam
   - Schedule Visit
   - Unscheduled Visit
7. Select **Save**.
8. If you:

- have created a new visit you must add SOAP notes or Exam findings. Choose either the **Soap** or the **Exam** button to the left. Add notes and choose the **Exit Worxflow** button  .
- have copied a visit that requires changes to the SOAP or exam choose either the **Soap** or the **Exam** button to the left. Complete edits and choose the **Exit Worxflow** button  .
- have copied a visit that does <u>not</u> require changes click **Close**.

Edit a Visit

1. Search for and select a patient.
2. Select the  button to display the *Patient History* screen.
3. Select the the visit to edit followed by the **Edit Visit** button
4. Make any changes to the visit and select the **Exam** or **SOAP** button to change findings
5. Choose the **Exit Worxflow** button  if you selected **Exam** or **SOAP**.
6. Select **Save** followed by **Close**.

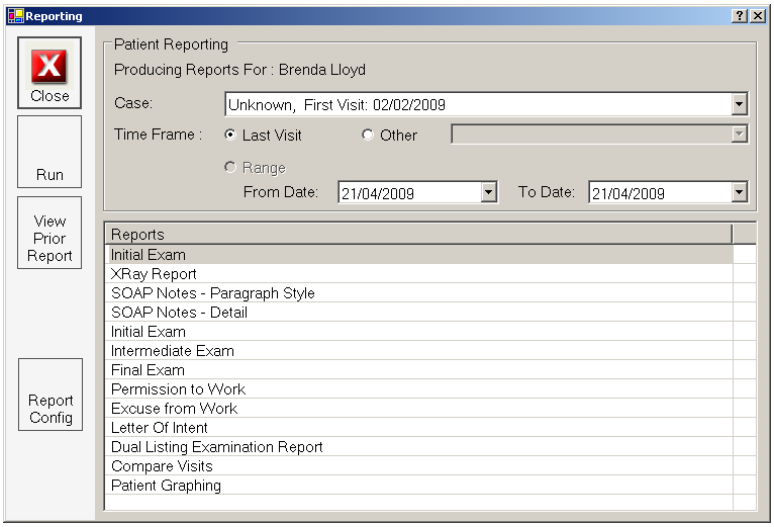
Patient Reporting

Patient Reporting allows you to configure customized reports, view, and run them

Run a Patient Report

1. Search for and select a patient.

2. Select the  button and the Patient Reporting window will appear.



3. Select the case from the drop down menu for which you want reports. If you want the report for a specific date or want to print it for a specific time frame, you can select the visit or a specified range of dates.

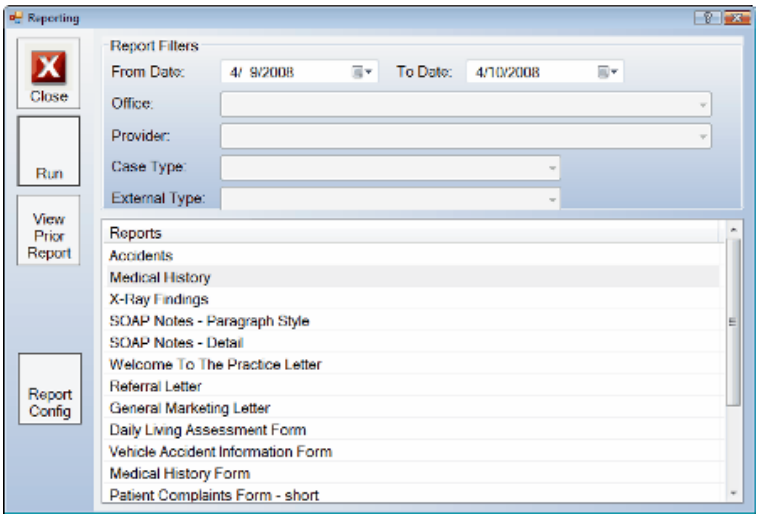
4. Select the report from the listing in the window and select **Run** and your report will print to a Microsoft Word document. If you do not have Word it will open in Wordpad although some functionality may be compromised.

Headings and other formatting options are selected under the **Administration** menu, **Reports, Reports Admin.**

View a Prior Report

1. Search for and select a patient.
2. Select the  button and the Patient Reporting window will appear.
3. Select the **View Prior Report** button and you will be given a list of reports for that patient.

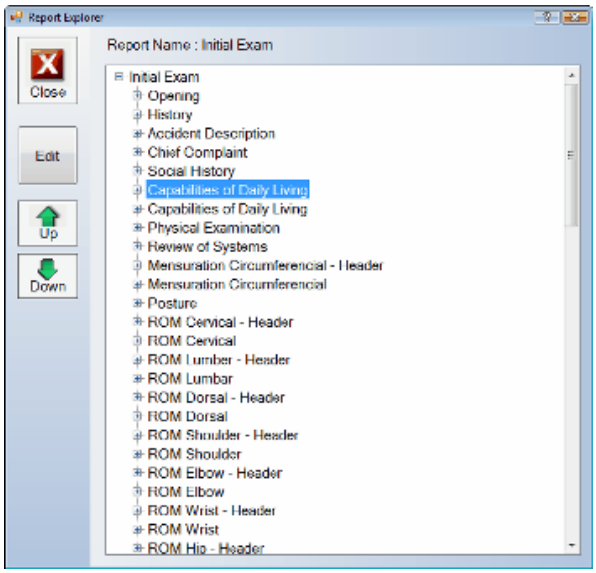
☑ Only reports created on the computer where you are working will be in this list. The exception is reports marked as sent. Sent reports are highlighted in yellow.



4. There are three options in the *Existing Reports* window.
   - highlight the report and select the **View** button for the report to appear in Microsoft Word for viewing, editing, and/or printing.
   - highlight the report and select the **Mark as Sent** button for the report to be logged as sent out and highlighted.
   - highlight the report and select the **Print** button to print the report immediately.
5. Select **Close** when you are finished.

Report Configuration

1. Search for and select a patient.
2. Select the  button and the *Reporting* window will appear.
3. Highlight the report to configure.
4. Select the **Report Config** button. See page 80 for detailed instructions.



Patient Notes

If you would like to add patient notes to the record you can follow the procedures in this section.

New Notes

☑ This functionality exists for tablet computers only.

1. Search for and select a patient.
2. Select the  button and the Notes window will appear.
3. Choose the **New** button and a screen will appear with two tabs: Hand Notes and Converted.

Using the pen tool or your Tablet PC pen write your notes on the screen for the patient, similar to the example below.

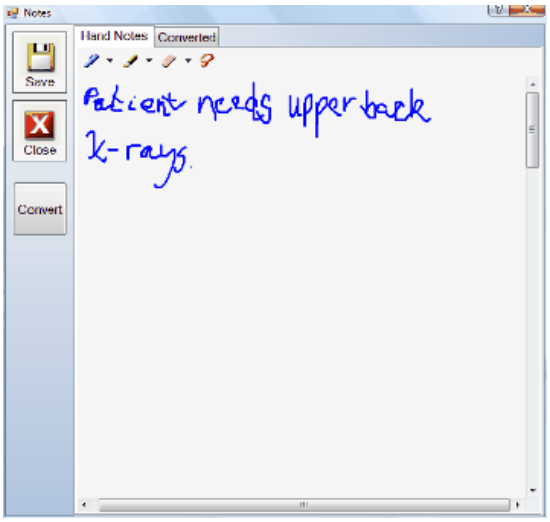
The drawing tools built into the software are the:

Pen (tool in blue): You can adjust the color, size, tip, transparency, and smoothness by selecting the drop down arrow next to the pen icon. You can then draw and write anything on the note.

Highlighter (tool in green): You can adjust the color, transparency, tip, size, and smoothness by selecting the drop down arrow next to the highlighter icon. You can then highlight any area on the note.

Eraser (tool in pink): You can select the mode and size of the erase by selecting the drop down arrow next to the eraser icon. You can then erase any notes you have made.

Lasso (tool in orange): You can draw around a large area with the lasso tool and it will then create a box around that area that you can use to move the note you have made to a different area on the screen.



4. When you are done adding notes, select the **Convert** button.
5. View the notes after they have been converted to text by selecting the *Converted* tab.
6. Select **Save**.
7. Select **Close**.

Edit Notes

1. Search for and select a patient.
2. Select the  button and the Notes window will appear.
3. Highlight the notes file to edit.
4. Choose the **Edit** button and the screen will appear with two tabs: Hand Notes and Converted.
5. Make any necessary changes and select **Save** when finished**.**
6. Select **Close**.

Print Notes

1. Search for and select a patient.
2. Select the  button and the Notes window will appear.
3. Highlight the notes file and select **Print**.

Patient Images

The Patient images section is where you can upload patient x-rays or other images to the patient's profile.

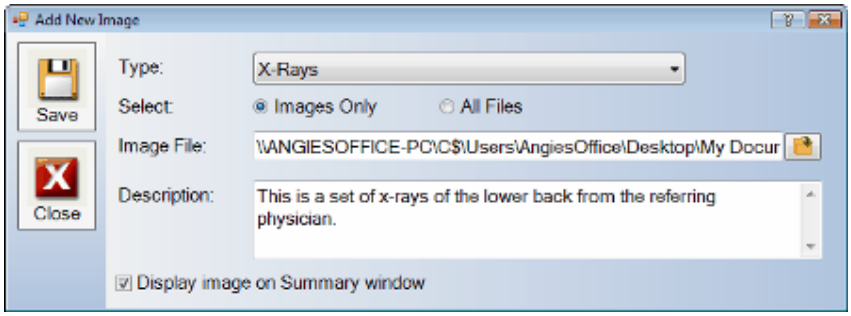
Add New Patient Images

1. Search for and select a patient.
2. Select the  button.
3. Select the **New** button.
4. Select the type of image from the drop down menu, which consists of the following:
   - Mock-up
   - Patient Intake Forms
   - Patient Picture
   - X-Rays
5. Select whether these are image files only or all files, by selecting the appropriate radio button.
6. Select the **Browse** to select the path of the image file. When you have navigated to the proper path, highlight the file and select **Open**.
7. Enter a description if necessary.

☑ The Description should be written in complete sentences.

8. Place a checkmark in the box if you would like the image to display in the Summary window of the patient profile.
9. When you have completed entering information into the Patient Image window, select **Save**.
10. Select **Close**.

A completed Patient Image screen would look similar to the screen shown below.



Edit an Existing Patient Image

1. Search for and select the patient to edit.
2. Select the  button.

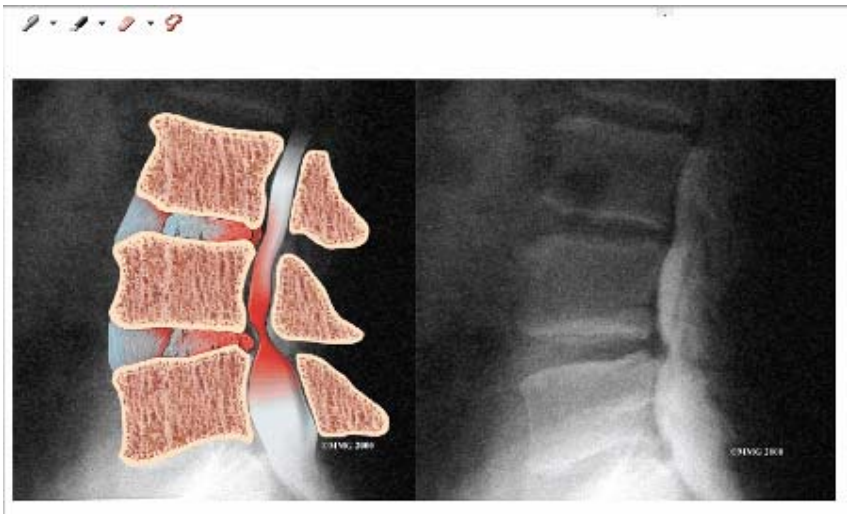
3. Highlight the image you would like to edit from the list that appears.
4. Select the **Edit** button.
5. Make any necessary changes and select **Save**.
6. Select **Close**.

View Patient Images

1. Search for and select the patient to edit.
2. Select the  button.
3. Highlight the image you would like to edit from the list that appears.
4. Select **View**.

The drawing tools built into the software are the:

> **Pen** (tool in blue): You can adjust the color, size, tip, transparency, and smoothness by selecting the drop down arrow next to the pen icon. You can then draw and write anything on the image.
>
> **Highlighter** (tool in green): You can adjust the color, transparency, tip, size, and smoothness by selecting the drop down arrow next to the highlighter icon. You can then highlight any area on the image.
>
> **Eraser** (tool in pink): You can select the mode and size of the erase by selecting the drop down arrow next to the eraser icon. You can then erase any markings you have made on the image.
>
> **Lasso** (tool in orange): You can draw around a large area with the lasso tool and it will create a box around that area. Now you can move the marking to a different areas on the image.



5. Make any necessary changes and select **Save**.
6. Select **Close**.

Change the Order of Patient Images

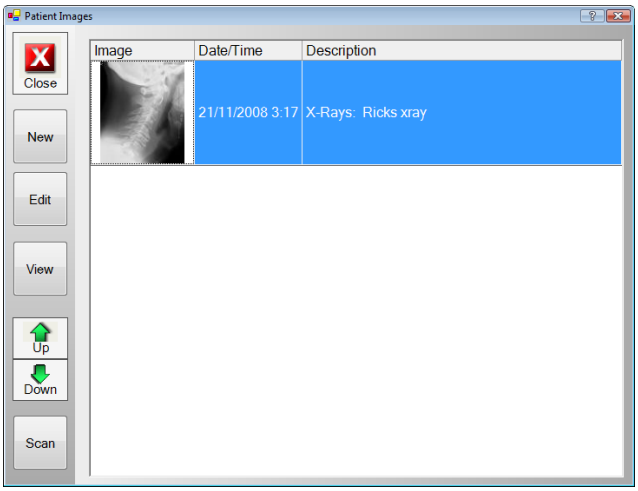
Search for and select a patient whose images you need to view.

2. Highlight an image and select the **Up** and **Down** buttons to move them into the appropriate order.

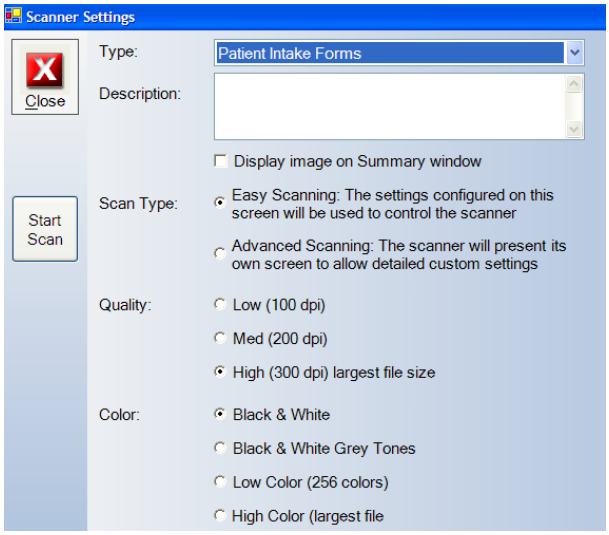
3. Select **Close** when done.

Document Scanning

The ability to scan documents and have them attached to the patient has been added to the system. To access this functionality, you must first configure the system to know about your scanner. This is done under **Administration, System Configuration,** and **Defaults**. On the Scanning Tab select **Get Devices** button and select the scanning device (the scanner must be hooked up to the machine you are on). Select a location to save scanned images to. Once this information is configured then scanning can be performed. Select the **Patient Images** icon, then the **Scan** button. Select the scanning quality options (for more detailed options select the "Advanced Scanning" option).



The scan button will present the following window.



Patient Alerts

The Patient Alerts icon on the main screen toolbar will allow you to create two types of notifications:

- *Schedule Alert* allows you to create a message that will appear in a patient file when you select the patient or when you start the patient visit
- *Send Message Now* allows for communication with the front desk or other ChiroWrite user.

Alert Types

Alert Types are customized under **Administration, Alerts** and must be setup prior to creating an alert for a patient. See page 44.

Create Scheduled Alert

A scheduled alert will appear either when selecting a patient or starting a visit for a patient. They can be set up to appear either *every time, next time, every ? visit, after ? date,* or *between ? dates*. When the alert appears you are offered the option to **Leave Alert ON** or **Turn Alert OFF**
Search for and select a patient. Choose the Patient Alert button and select **New**.

On the *Add New Patient Alert* screen choose the type. Choose when you want the alert to appear by selecting an option from the *Occurs* drop down list. Be sure to select whether you wish the alert to appear when the patient is selected or the visit is started.

Type any necessary information into the message field.

Choose **Save** then **Close**.

Create Send Message Now Alert

Send Message Now alerts will send an instant message to another system user. Alerts can be sent to any employee who is set up under the Administration menu. See page 56 of your ChiroWrite manual for Employee setup.

Search for and select a patient. Choose the Patient Alert button and select **New**.

On the *Add New Patient Alert* screen choose *Send Message Now.* Choose a *Type*. The types available are customized under the Administration menu.

Select a recipient beside *Send To:.* These names are pulled from Employees listed in the Administration menu.

Add a message if applicable.

Choose **Save** then **Close.**

The recipient will get the alert:

- right away if their ChiroWrite program is open; the alert appears on the top of the screen that is open
- right away if ChiroWrite is minimized; ChiroWrite will maximize automatically
- the next time ChiroWrite opens if the program was closed.

Home

The home button allows you to clear the screen and go back to the ChiroWrite home screen from wherever you are in the program. This includes during patient visits and when using menu items.

☑ This is an essential tool for protecting patient privacy. The Home button allows you to clear patient information before leaving the computer or treatment area.

Menu Items

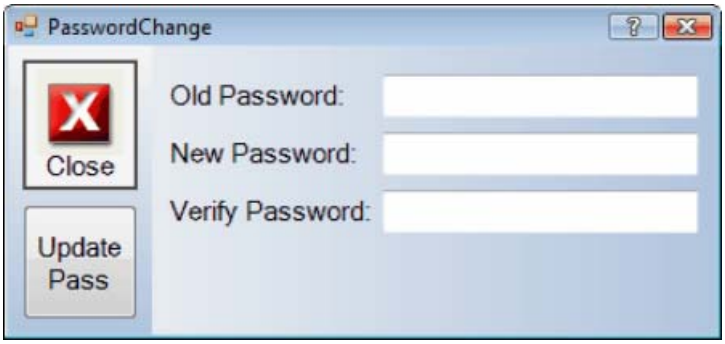
The menu items located on the top toolbar of the ChiroWrite program are outlined in this chapter. Each topic is broken down into sub chapters to better assist you in searching for a specific topic.

File Menu

The file menu allows you the opportunity to change your system passwords, set the preferences, and perform imports and exports in the system.

Change Password

1. Select **File**, **Change Password**.



2. Enter the old password.
3. Enter the new password.
4. Re-enter the new password for verification purposes.
5. Select the **Update Pass** button then **Close**.

Preferences

Select the colour scheme you prefer for the Chirowrite program. *(Note: The color scheme will not take effect until after you log back into the system.)* Colour scheme choices are:

- Autumn Burst
- Storm Clouds
- Summer Days
- Summer Night

After you have made your selection select **Save**, then **Close**.

Import

1. Select **File, Import**.

2. Choose the system that you are importing from and follow the on screen instructions. The Chirowrite system allows the following programs to import data into it:

- Eclipse
- Ezbis
- MediSoft
- LinkRunner
- PMP
- InPhase
- Chiro8000

Export

1. Select **File, Eclipse**, **Billing**.

2. Follow the instruction prompts to export your data to the Eclipse system.

Administration Menu

The Administration menu allows you to customize the setup for your office.

WorxFlow

ChiroWrite provides a unique workflow engine, WorxFlow. This allows the doctor to configure the order that the examination and SOAP screens appear while also allowing for the creation of WorxFlow.

If you have a certain group of tests that you would perform for a knee injury and another set of tests for patients with back problems you could configure multiple WorxFlows so that a particular group of tests are available for that particular type of injury instead of all the default tests. This customizable feature reduces the number of items that you go through to complete the examination.

Create a New WorxFlow

Warning: If you want to create a new WorxFlow please contact technical support for assistance at 800-642-6082. Please do not try to create a new WorxFlow on your own as you could modify all WorxFlow systems.

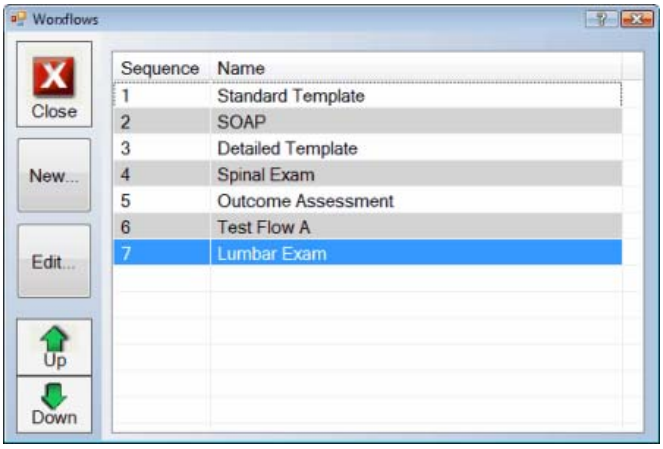
Edit an Existing WorxFlow

The Chirowrite program allows you to customize the order of the Worxflows. You can also add, edit, remove, or move the categories in a Worxflow to meet your needs.

Changing the Order of the WorxFlow

The WorxFlow system comes with several predefined WorxFlows. The steps outlined below will assist you in changing the order of the WorxFlows to organize them as you wish them to appear.

1. Select **Administration**, **WorxFlow** from the top menu bar.



2. Highlight the name of the WorxFlow and select the **Up** or **Down** buttons to change the order.

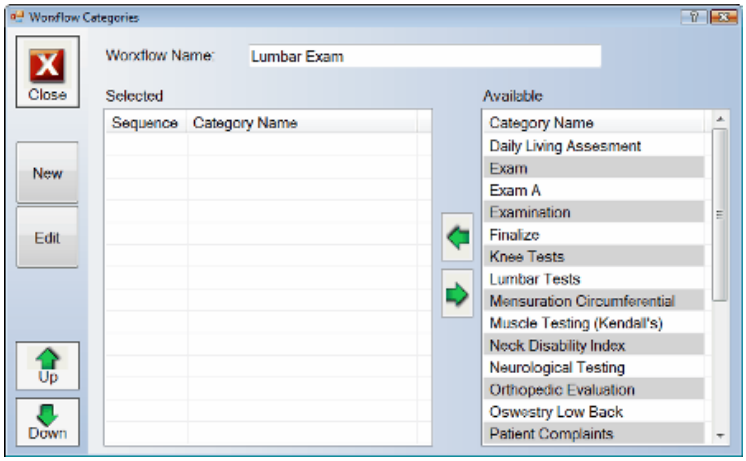
3. Select the **Close** button when finished.

Add an Existing Category to a WorxFlow

Each WorxFlow is made up of one or more categories. The WorxFlow system comes with predefined WorxFlows that are comprised of multiple categories. The steps outlined below will assist you with adding a category to one of the WorxFlows in the system.

1. Select **Administration**, **WorxFlow**

2. Highlight the WorxFlow and select **Edit** to launch the WorxFlow Categories.



3. Highlight a Category name on the right side under the *Available* window and select the Left arrow to move it to the *Selected* window.

4. Change the order of the categories by using the up and down arrows to the left.

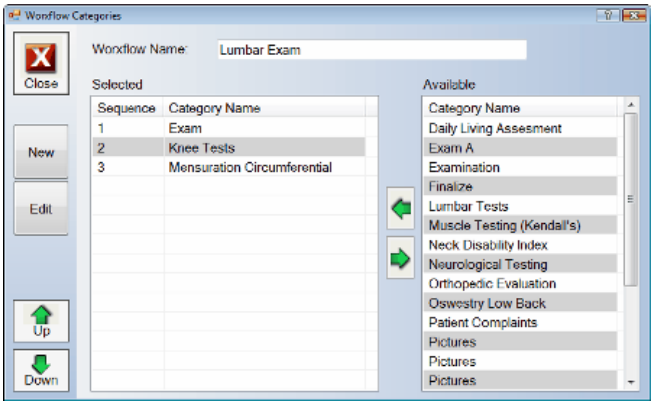
5. Select **Close** when finished.

Remove a Category from the WorxFlow

The WorxFlow system comes with seven predefined WorxFlows that are comprised of multiple categories. The steps outlined below will assist you with removing a category from one of the seven WorxFlows in the system.

1. Select **Administration**, **WorxFlow** from the top menu bar.

2. Highlight the WorxFlow and select **Edit**. On the left panel of the Edit screen is the list of categories for the selected WorxFlow.



3. Highlight a Category from under the *Selected* window on the left side and select the **Right** Arrow to move the item back to the *Available* window on the right.

4. Select **Close**.

Creating a Category from the WorxFlow

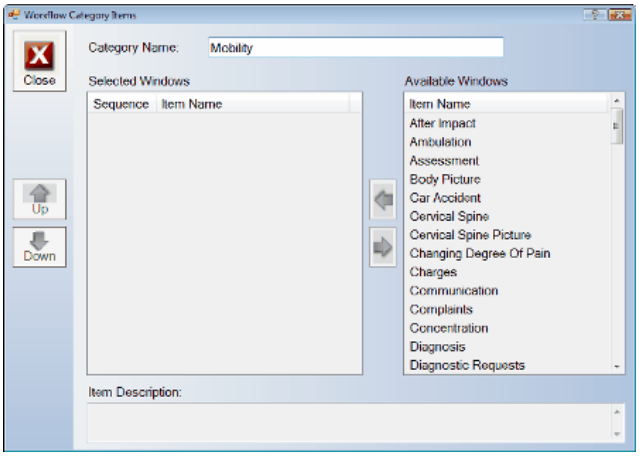
The WorxFlow system comes with seven predefined WorxFlows that are comprised of multiple categories. The steps outlined below will assist you with creating a new category for your WorxFlow system.

1. Select **Administration**, **WorxFlow** from the top menu bar.

2. Highlight a WorxFlow and select the **Edit** button to display the WorxFlow categories.

3. Select the **New** button.

4. Type a Category Name in the specified box as shown below and press the tab key.



5. The next step is to move items from the *Available* windows to the *Selected Windows* column. Select the **Left** or **Right** arrows to move items back and forth under the columns. You can also change the order of items under the *Selected Window*, by selecting the **Up** or **Down** buttons.

6. Select **Close**.

Move the Order of an Item within a Category

The WorxFlow system comes with predefined WorxFlows that are comprised of multiple categories. The steps outlined below will assist you with changing the order of the categories listed for a particular WorxFlow.

1. Select **Administration**, **WorxFlow** from the top menu bar.
2. Highlight the appropriate Category then select the **Up** or **Down** arrow to move the items.
3. Select **Close**.

WorxPhrase

WorxPhrase allows you to configure standard sentences and/or paragraphs that you use often and store them for quick retrieval. An example of what WorxPhrase can do for you is that if you had a sentence, such as, "[Name] is complaining of lower back pain. [He/She] feels this pain after any moderate activity" the system would convert that information to "Mr. Smith is complaining of lower back pain. He feels this pain after any moderate activity." The WorxPhrase function can greatly reduce the amount of typing that has to be performed.

Create a New WorxPhrase

ChiroWrite offers two locations where you can add a WorxPhrase:

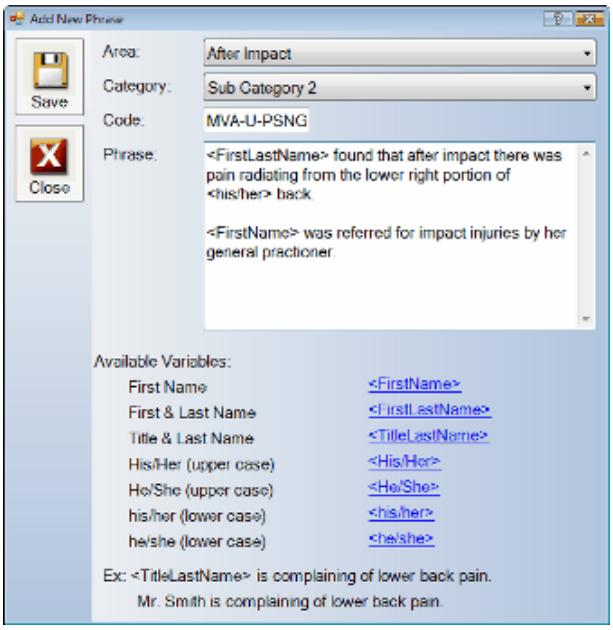
- from the Administration menu
- from within a template.

To create a WorxPhrase from the Administration menu:

1. Select **Administration, WorxPhrase**.
2. Select the **New** button**.**
3. Select the **Area** drop down menu and choose where you want to use this phrase.
4. Select the **Category**.
5. Enter the **Code**.

☑ WorxPhrases must be typed in complete sentences.

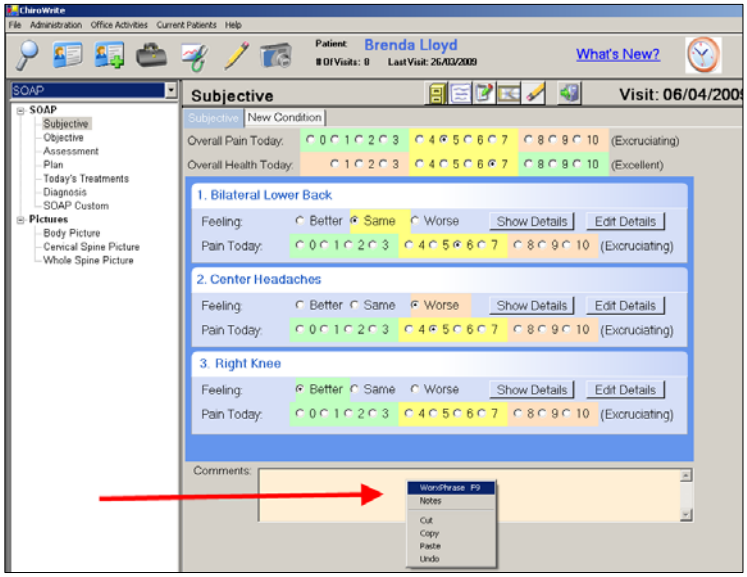
6. Type the custom phrase. You can also utilize the Available Variables by selecting on the blue link to automatically insert that item into your phrase.



7. Select **Save**, then **Close**.

To create a WorxPhrase from within a template:

1. Locate Comment sections where the background colour is peach. These sections are linked to the WorxPhrases.



2. Right select and select WorxPhrase.
3. Select **New Phrase** and create your phrase as detailed above.

Edit an Existing WorxPhrase

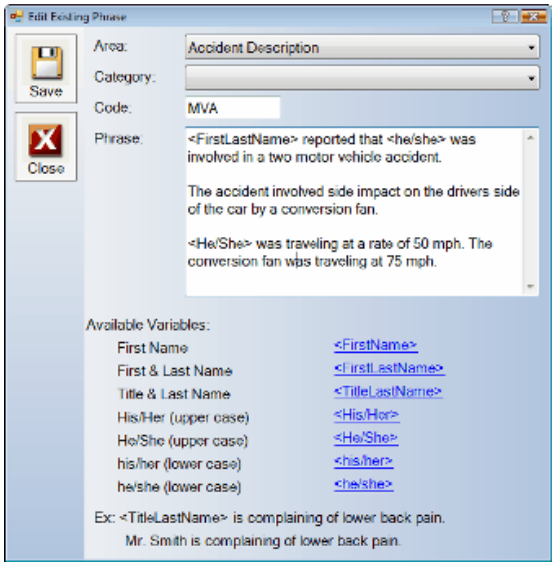
1. Choose **Administration**, **WorxPhrase**.

2. Highlight the phrase to edit.

3. Select **Edit** to display the Edit Existing Phrase window.

4. The Phrase can be rewritten to meet your needs. You can also use the Available Variable links in the window so that when reports are run the items are automatically inserted for that patient.

☑ WorxPhrases must be typed in complete sentences.



5. Select the **Save** button.

6. Select **Close.**

Add a WorxPhrase Category

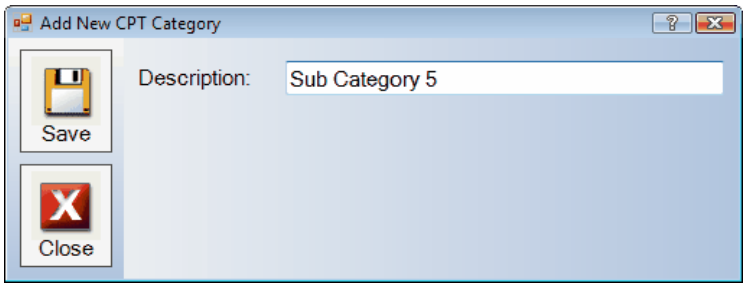
WorxPhrase categories are used to break up many different phrases that may be added to one area so that the phrases are easier to find.

1. Select **Administration**, **WorxPhrase**.

2. Highlight a phrase and select the **Category** button.

3. The *WorxPhrase Categories* window appears. Select the **New** button.

4. Enter a new **Description** in the *Add New CPT Category* window. Note: Ontario users do not require CPT codes. This area will be edited to meet provincial requirements.



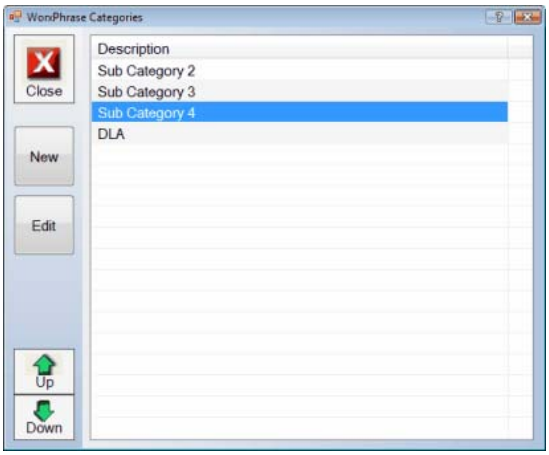
5. Select the **Save** button, then **Close**.

Edit a WorxPhrase Category

1. Select **Administration**, **WorxPhrase**.
2. Highlight the phrase and select the **Edit** button.
3. Make the necessary changes to the *WorxPhrase Category* window.
4. Select the **Save** button.
5. Select **Close.**

Change the Order of WorxPhrases

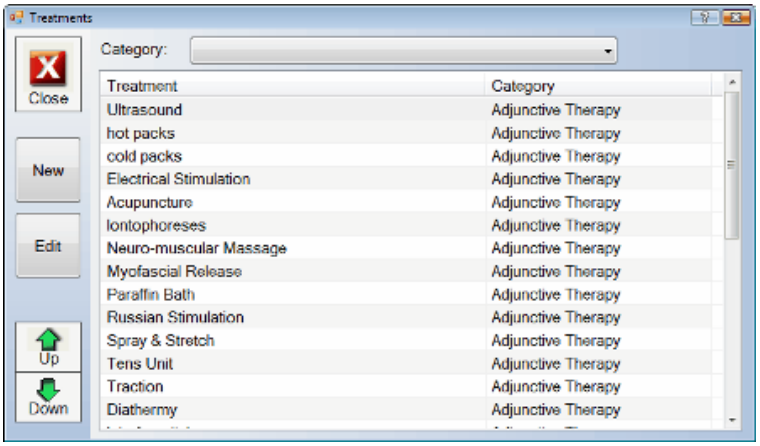
1. Select **Administration**, **WorxPhrase**.
2. Highlight the phrase and select the **Category** button.
3. Highlight the WorxPhrase Category and select the **Up** or **Down** arrows to move the category to the desired position.



4. Select **Close**.

Change the Order of Treatments

1. Select **Administration**, **Treatment Configuration**, **Treatments**.



2. Limit the list to a specific category by choosing the category from the drop down menu. Then highlight the treatment and select the **Up** or **Down** arrow to move the treatment into the preferred position.
3. Select **Close**.

Create a Treatment

1. Select **Administration**, **Treatment Configuration**, **Treatments**
2. Select the **New** button.

☑ Description, Category and Status are required to create a treatment.

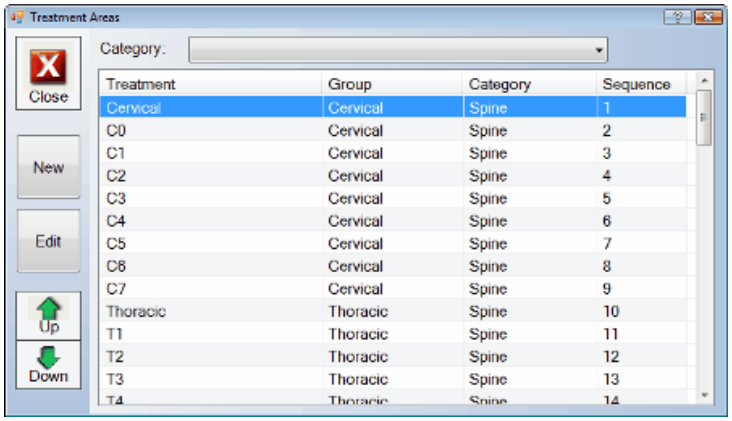
4. When you are finished entering data, select **Save**.
5. Select the **Close** button.

Edit a Treatment

1. Select **Administration**, **Treatment Configuration, Treatments**.
2. Select the **Edit** button.
3. When finished, select **Save**.
4. Select the **Close** button.

Changing the Order of Treatment Areas

1. Select **Administration**, **Treatment Configuration, Treatment Areas**.
2. Choose the category from the drop down menu and then highlight the treatment. Select the **Up** or **Down** button to move the treatment area to the desired location.



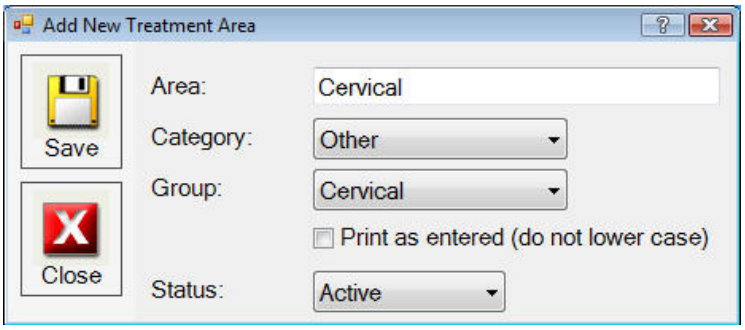
3. Select the **Close** button.

Create a Treatment Area

1. Select **Administration**, **Treatment Configuration**, **Treatment Area**.
2. Select the **New** button.

☑ All fields need to be filled in to create a treatment area.

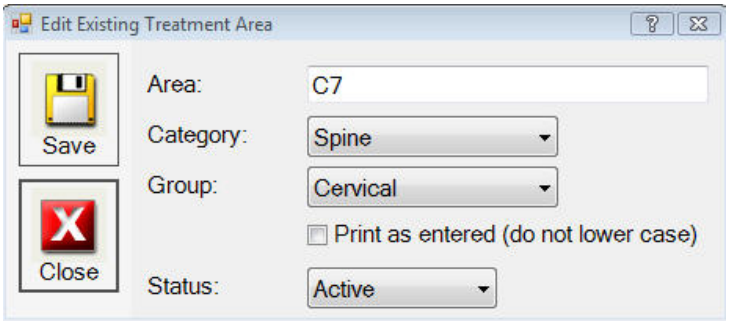
3. Enter the **Area**.
4. Select the **Category** from the drop down menu.
5. Select the **Group**.
6. Choose a **Status**.



7. Select **Save**.

Edit a Treatment Area

1. Select **Administration**, **Treatment Configuration**, **Treatment Area**.
2. Highlight a treatment area and select **Edit**.
3. Make the necessary changes in the window similar to the one shown below and select **Save**.



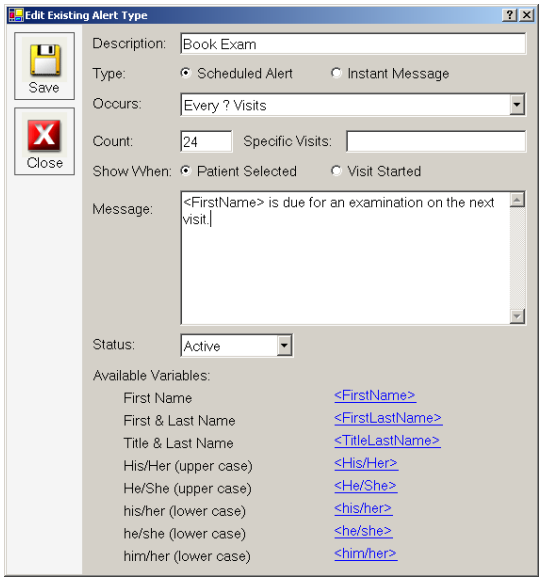
4. Select the Close button.

Alerts

Alerts are messages that will appear on patient files when either accessing the patient file or starting the visit.

Select **New**. Type a description for the alert so that you can recognize it. Choose either scheduled or instant message. Select an occurrence frequency from the drop down list, count or specific visits and when the alert should show. Type the alert into the Message field and use the dynamic tag options listed in blue below if applicable.

Choose **Save** followed by **Close**.



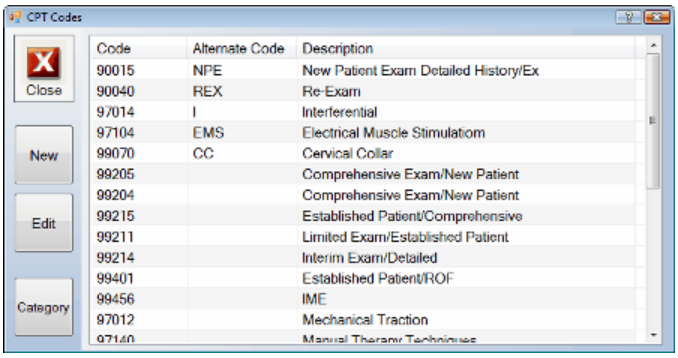
Billing Codes

☑ The Billing Codes area is not active at this time.

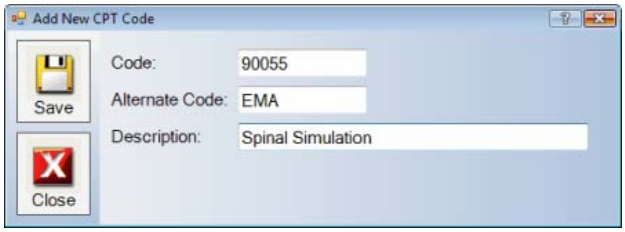
Create and edit customized Billing Codes for use in your practice and also add, edit, map and move categories within the Billing Codes.

Create a New Billing Code

1. Select **Administration**, **Billing Codes**.



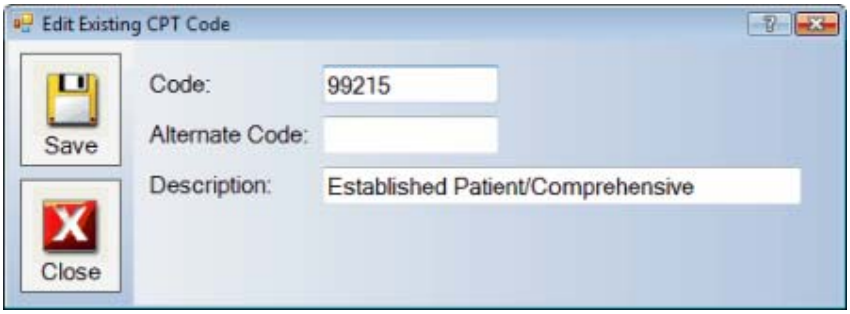
2. Select **New**.
3. Enter a **Code**.
4. Enter an **Alternate Code** (Note: The alternate code is used to link to certain external billing systems.)
5. Enter a **Description**.



6. Select **Save**.
7. Select **Close**.

Edit a Billing Code

1. Select **Administration**, **Billing Codes**.
2. Select **Edit** and make the necessary changes.

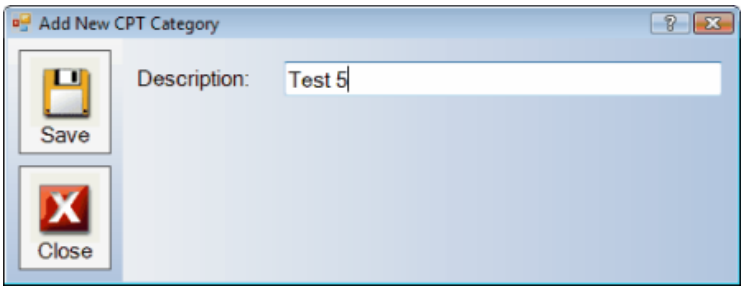


3. Select **Save**.
4. Select **Close**.

Add a CPT Category

☑ The CPT Category area is not active at this time. It will be enhanced in future updates.

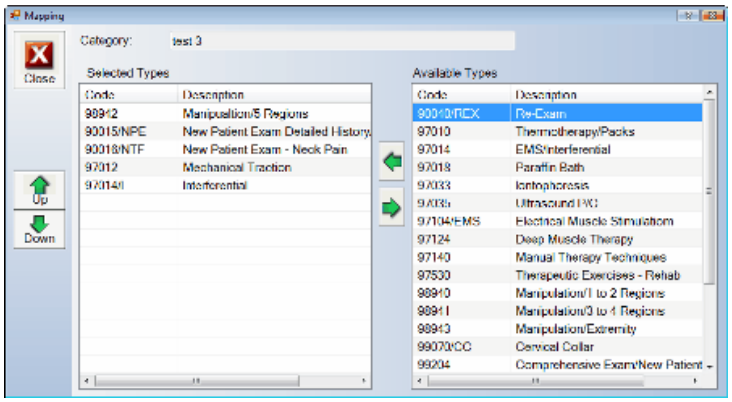
1. Select **Administration**, **Billing Codes**.
2. Select the **Category** button.
3. Select the **New** button and enter the description in the text window.



4. Select **Save.**
5. Choose **Close**.

Map a Category

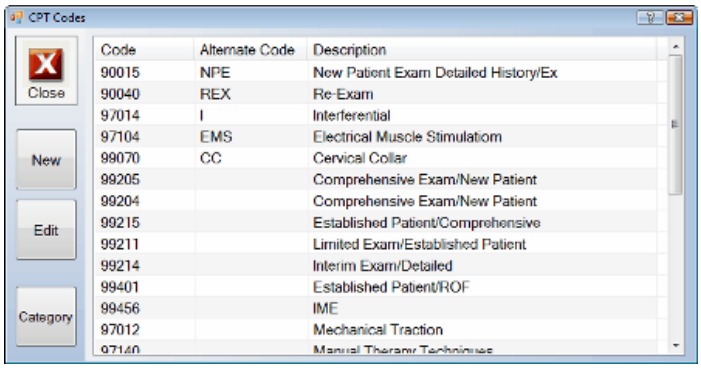
1. Select **Administration**, **Billing Codes**.
2. Choose the **Category** button.
3. Select the **Mapping** button to display the *Mapping* window.
4. Select a code to highlight under the *Available Types* window to the right. Select the **Left Arrow** to move the item to the *Selected Types* window on the left side. If you need to move an item back to the right, highlight the item and select the **Right Arrow** to move it back to the right column.



1. Select **Close** when finished making changes.

Edit a Category to a CPT Code

1. Select **Administration, Billing Codes**.
2. Highlight the code and select the **Category** button.



3. Highlight the Description and select the **Edit** button.
4. Enter a new description.
5. Select **Save**.
6. Choose **Close**.

Move a Category

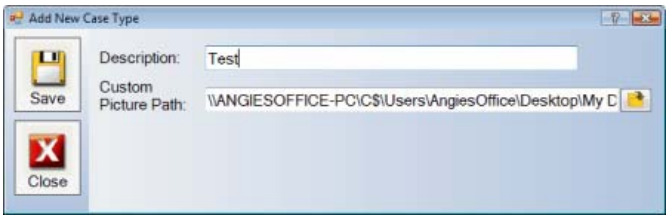
1. Select **Administration**, **Billing Codes**.
2. Highlight a code and select the **Category** button.
3. Select the **Up** or **Down** arrows to move the categories to the preferred order.
4. Select **Close**.

Case Types

The following section will assist you in the steps to create and/or edit a case type within the Chirowrite program.

Create a New Case Type

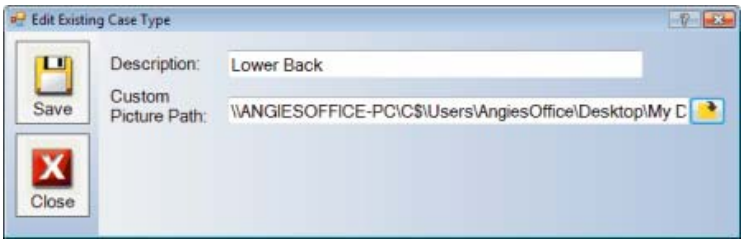
1. Select **Administration**, **Case Type**.
2. Select **New** and type a new description for the Case Type.
3. You can also add a custom picture by selecting the Browse button to find the picture and select **Open**.
(Note: This option is usually left blank. Please contact technical support if you wish to use this feature.)



4. When you are finished, select **Save**.
5. Select **Close**.

Edit a Case Type

1. Select **Administration**, **Case Type**.
2. Highlight the case type and select **Edit**.
3. Enter a new description.
4. You can also add a custom picture by selecting the Browse button to find the picture and select **Open**.
(Note: This option is usually left blank. Please contact technical support if you wish to use this feature.)



5. When you are finished, select **Save**.
6. Select **Close**.

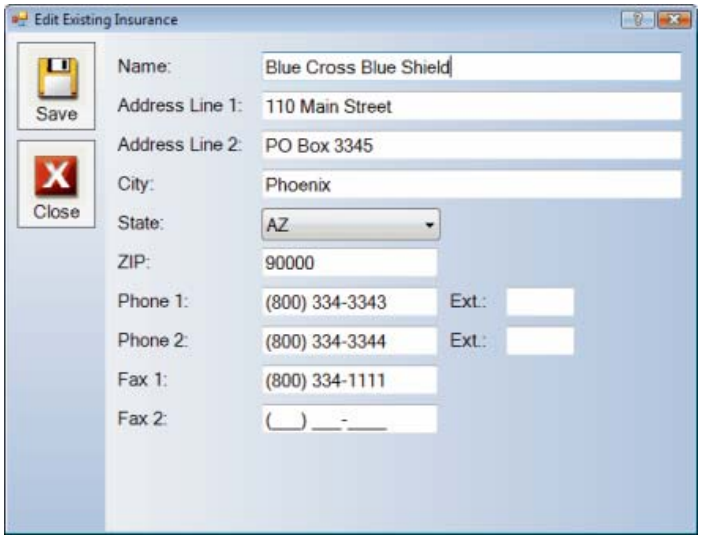
Contacts

The Contacts section allows the user to create contacts within the system. The contacts can be created for any person or organization but typically they are comprised of Insurance Companies and Referrals.

Create an Insurance Contact

1. Select **Administration**, **Contacts**, **Insurance.**
2. Select the **New** button and enter the contact information for the Insurance company.

☑ The Name Field is required to add a contact.



3. When you are finished, select **Save**.
4. Select **Close**.

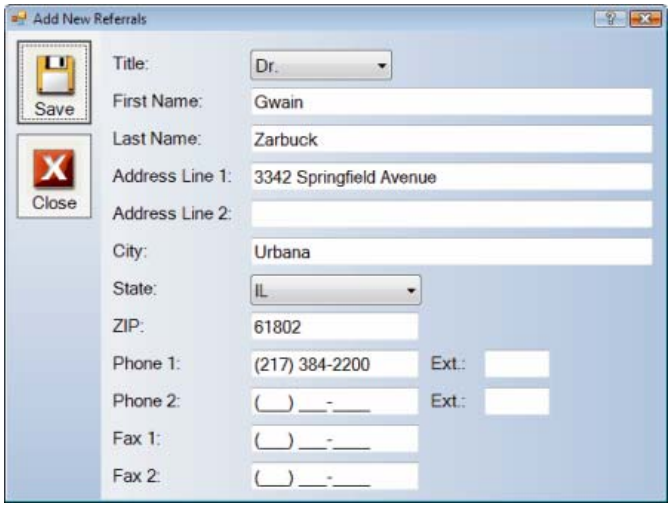
Edit an Insurance Contact

1. Select **Administration**, **Contacts, Insurance.**
2. Highlight the Insurance Company and select the **Edit** button.
3. Make any necessary changes to the contact information and select **Save** when you are finished.
4. Select **Close**.

Create a Referral Contact

1. Select **Administration**, **Contacts**, **Referrals**.
2. Select the **New** button and add the necessary Referral information.

☑ The Name Field is required to add a Referral.



3. When you are finished, select **Save**.
4. Select **Close**.

Edit a Referral Contact

1. Select **Administration, Contacts, Referrals**.
2. Choose the contact and select **Edit.**
3. Make the necessary changes.
4. When you are finished, select **Save**.
5. Select **Close**.

Custom Screens

Custom screens allow you to customize buttons to populate your notes with predefined information. Two areas are available to create your custom buttons:

- SOAP Custom which is available in the SOAP WorxFlow and offers the custom buttons in addition to the regular template items
- SOAP Custom Light which is a WorxFlow that provides you with the SOAP Custom Light buttons and Today's treatments only. The custom buttons replace the other WorxFlow template items.

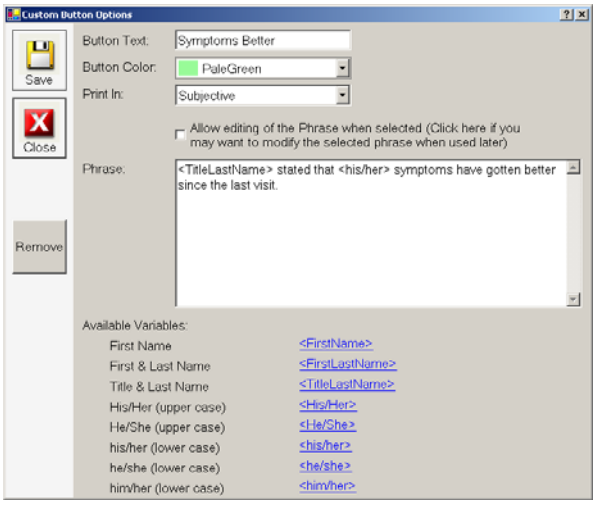
Note: Custom Light buttons do not populate Patient Summary Last Visit Notes and the History tab.

Creating SOAP Custom and SOAP Custom Light buttons

Custom screen buttons are setup under the **Administration** menu, **Custom Screens**. Choose either **SOAP Custom** or **SOAP Custom Light** and select **Edit**. Choose a button.

Two types of information can be input into the *Phrase* field to populate the patient SOAP note.

The first type is input in complete sentences using the *Available Variable* pick list below the *Phrase* field. See screen shot below.



Make sure the *Button Text* describes the information that will populate the note.

Select the appropriate area of the SOAP to *Print In:,* eg. Subjective.

A checkmark beside *Allow Editing* will enable you to edit the Phrase when selecting this button to populate the patients note.

Select tags from the *Available Variables* at the bottom of the screen to personalize the phrase.

For details on using Custom buttons see page 14.

Substituter Menus

SOAP Custom, SOAP Custom Light buttons, and Today's Treatment screens allow for the use of Dynamic tags.

The use of 'dynamic tags' in ChiroWrite is a way of setting up information in order to create simple menus named Substituters, that can be used when creating SOAP notes and treatments. Substituter menus can be created to list options such as Better, Same, Worse, or a numerical list to note the settings of modalities.

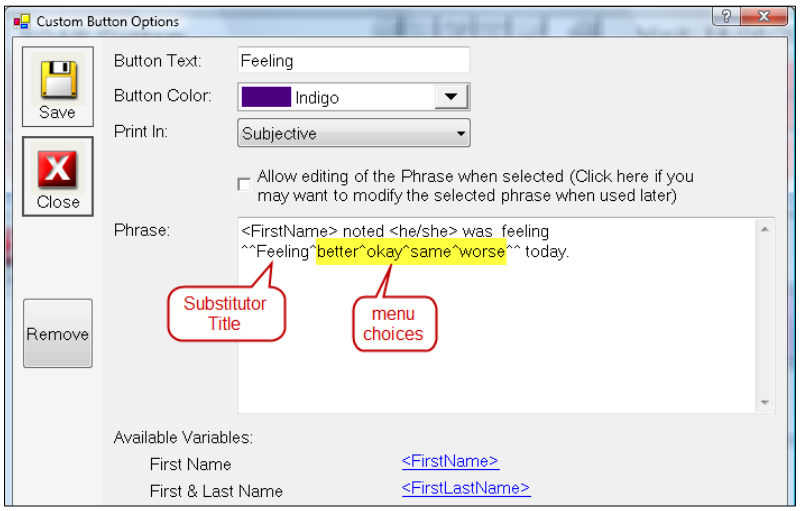
Setting up Dynamic Tags for a Menu

Set up Dynamic tags in Custom Screens or Today's Treatment. Shown below are options for Custom screens. Go to the **Administration** menu, **Custom Screens**. Choose either **SOAP Custom** or **SOAP Custom Light** and select **Edit**. Choose a button.

Dynamic tags input into the *Phrase* field will populate the Substituter menu. To create the menu use the *Available Variables* and the **carat** symbol which is located above the **6** key on your keyboard.

In your phrase, two carats starts the Substituter. The first word is the title. One carat separates the title and all the menu options. Two carats signifies the end.

IE. <FirstName> noted <he/she> was feeling ^^Feeling^better^okay^same^worse^^ today. Don't forget spaces in between words for a clean look on printed documents.

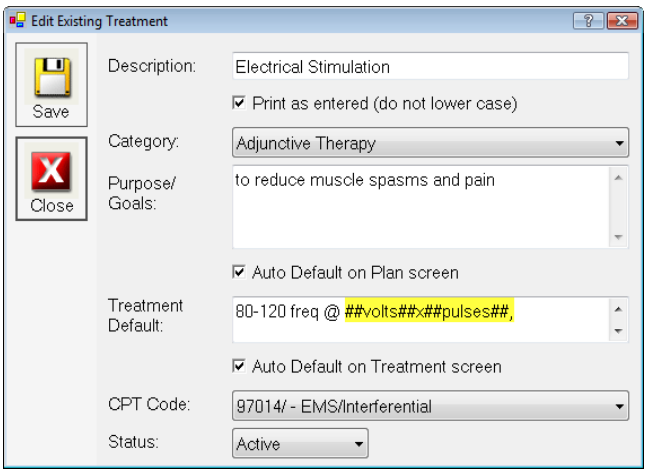


Don't forget spaces in between words for a clean look on printed documents.

Setting up Dynamic Tags for a Numerical Keypad

Shown below are options for setting up a numerical Substituter screen for use in Today's Treatment.

Go to the **Administration** menu**, Treatment Configuration, Treatments. Add** or **Edit**. In the *Treatment Default* field use the pound or number sign to create a numerical Substituter screen. Two number signs start the substituter screen followed by a word which is the title. Two number signs end the Substituter screen. To add an additional Substituter screen, type an X and start the number signs again. Ie, **##volts##x##pulses##.**



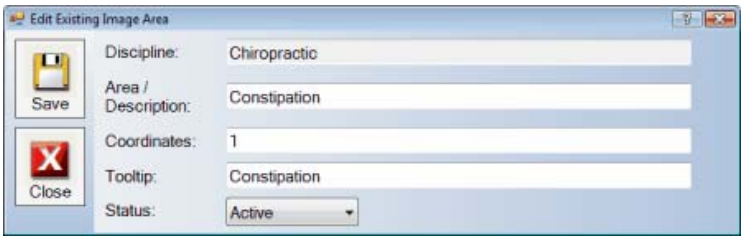
During SOAP note creation for your patients the Substituter screen will appear when selecting a treatment, therapy, or rehab type where 'dynamic tags' have been added. The Substituter screens allow you to input accurate information in a simple, timely manner

Disciplines

The Discipline function allows you to create and edit the Disciplines. Disciplines are used in the *Complaint Assist* screen. The visible options available are created and edited in discipline areas.

Create a New Discipline Area

1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline and select the **Areas** button.
3. The *Discipline Areas* window will appear. Select **New**.
4. Enter an **Area/Description**.
5. Enter a **Tooltip.** This is a hint that appears when the mouse over on the diagram.
6. Select the **Status** as either Active or Inactive.



☑ The Area/Description field is the minimum requirement for a discipline to be created.

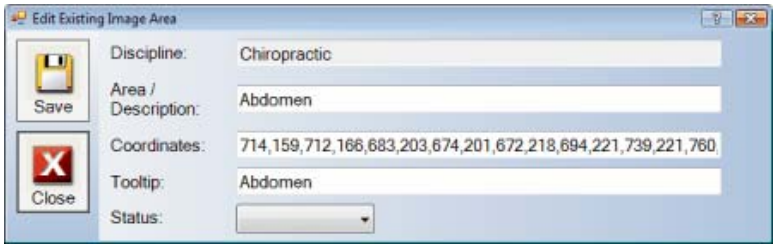
7. Select **Save**.
8. Select **Close**.

Edit a Discipline Area

1. Select **Administration, Disciplines**.
2. Highlight the Discipline and select the **Areas** button and the window below will appear.
3. The Discipline Areas window will appear. Highlight the area and select the **Edit** button.

Warning: The coordinates area is locked to prevent changes. If you make changes it will cause critical system malfunctions.

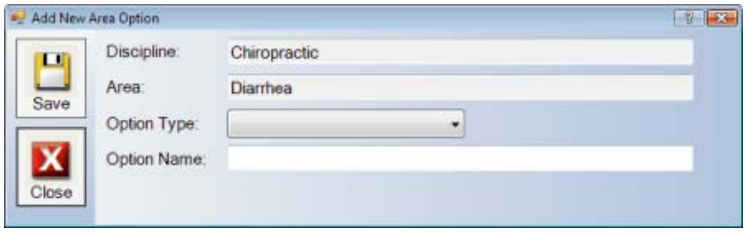
4. Edit the **Area/Description**.
5. Edit the **Tooltip**. This is a hint that appears when the mouse over on the diagram.
6. Change the **Status** if necessary.



7. Select **Save**, then **Close**.

Create a Discipline Area Option

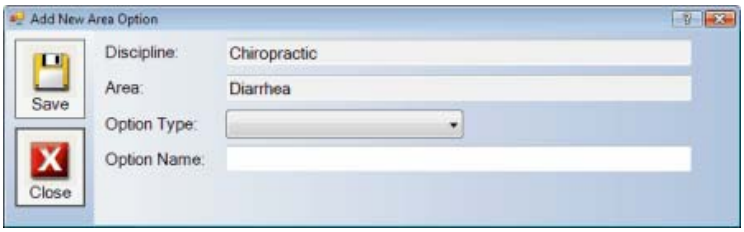
1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline and select **Areas**.
3. Select an area and select **Area Options.**
4. Select **New** to add a new area option.
5. Select an **Option Type**. The system has the following predefined options:
   - Pallative
   - Provocative
   - Quality
   - Radiating
   - Timing
   - Side Effects
   - Specifics
6. Specify an **Option name**.



7. Select **Save,** then **Close**.

Edit a Discipline Area Option

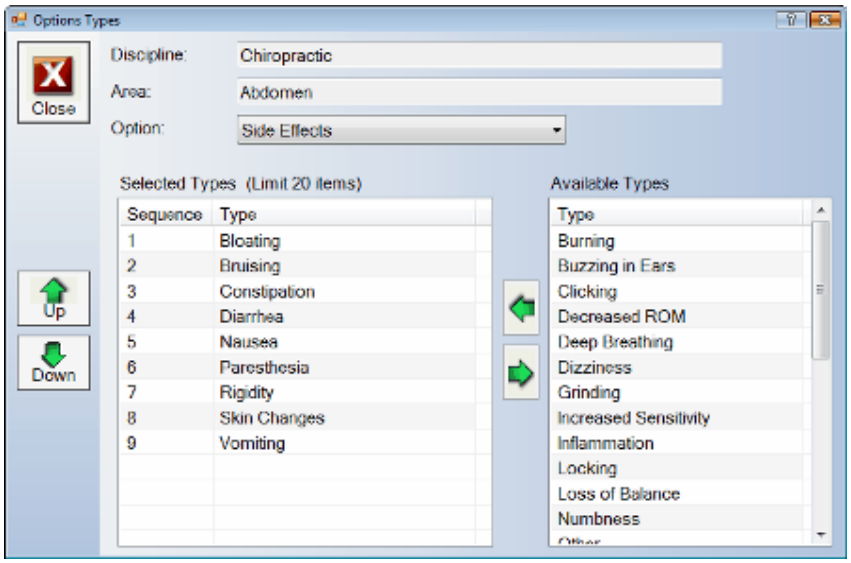
1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline and select **Areas**.
3. Select an area and select **Area Options**.
4. Select **Edit** to add a new area option.
5. Select an **Option Type**. The system has the following predefined options:
   - Pallative
   - Provocative
   - Quality
   - Radiating
   - Timing
   - Side Effects
   - Specifics
6. Specify an **Option name.**



7. Select **Save**, then **Close**.

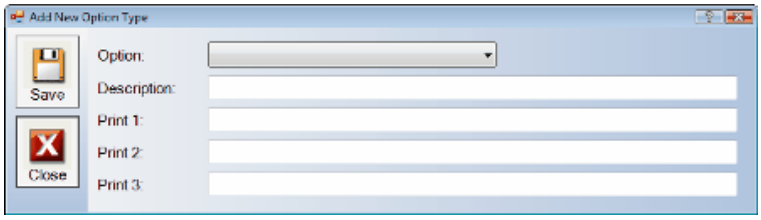
Create the Discipline Area Option Types

1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline and select **Areas**.
3. Select an area and select **Area Options**.
4. Select **Option Types**.
5. In order to move items from the *Available Types* to the *Selected Types*, highlight the item in the right window and select the **Left** or **Right** button to move the items back and forth. If you want to change the order of the Selected Types, highlight the item in the left column and select the **Up** or **Down** arrows to arrange the items.
6. Select **Close**.



Create a Config Type

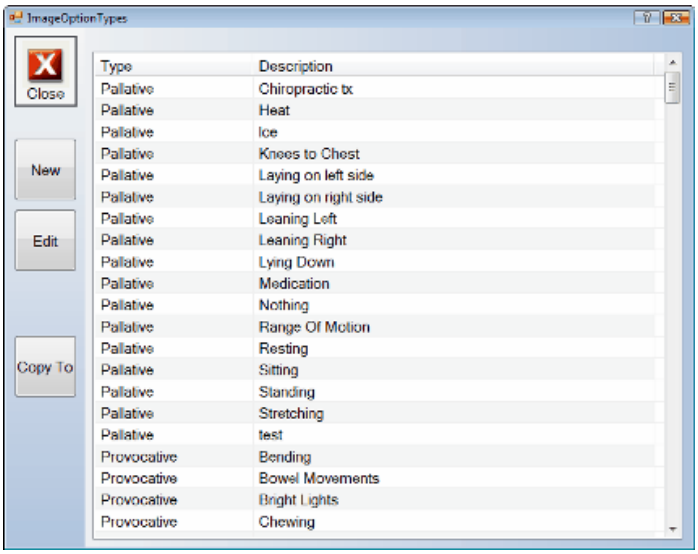
1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline you want to configure and select **Config Types**.
3. Select the **New** button and the following window will appear.
4. Select an **option** from the predefined list which includes the following:
   - Pallative
   - Provocative
   - Quality
   - Radiating
   - Timing
   - Side Effects
   - Specifics
5. Enter a **description**.
6. Enter the appropriate **description** in the Print 1, 2, and/or 3 boxes.



7. Select **Save**.
8. Select **Close**.

Edit a Config Type

1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline you want to configure and select **Config Types**.



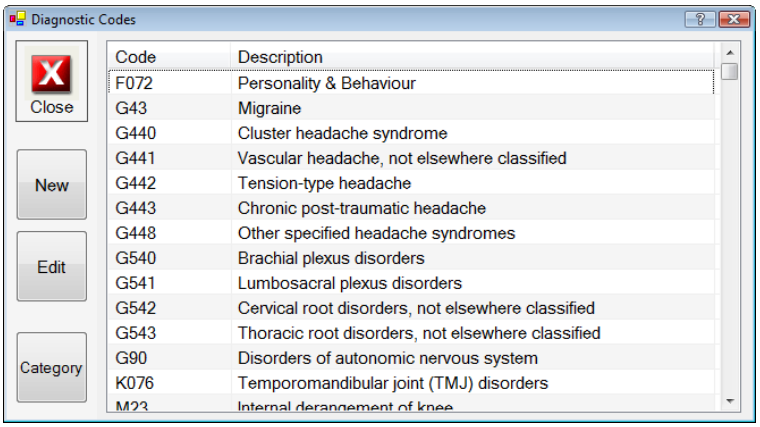
3. Highlight the item and select the **Edit** button and a window similar to the one shown below will appear.
4. Make the necessary changes and select **Save**.
5. Select **Close**.

Copy to Config Type

1. Select **Administration**, **Disciplines**.
2. Highlight the Discipline you want to configure and select **Config Types**.
3. Select the **Copy To** button and the discipline areas window appears.
4. Highlight the discipline area and select the **Copy** button.
5. Select **Close**.

Diagnostic Codes

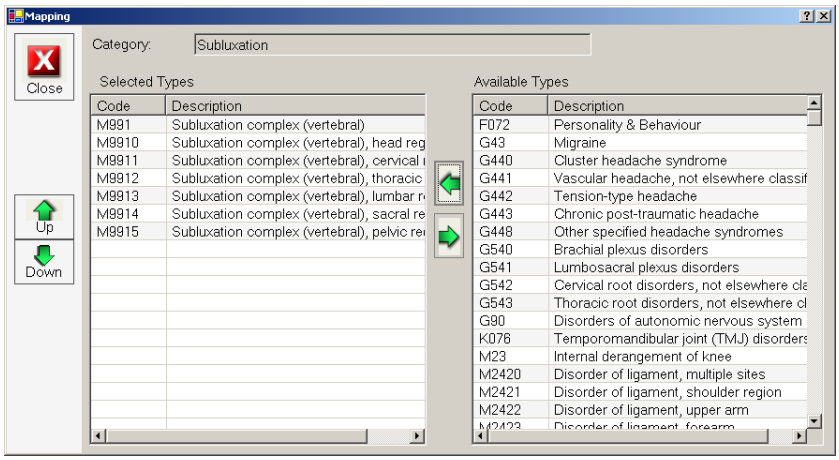
Many ICD-10-CA codes are listed within the Diagnostic Codes section. Add or edit diagnostic codes by selecting the **New** or **Edit** button.



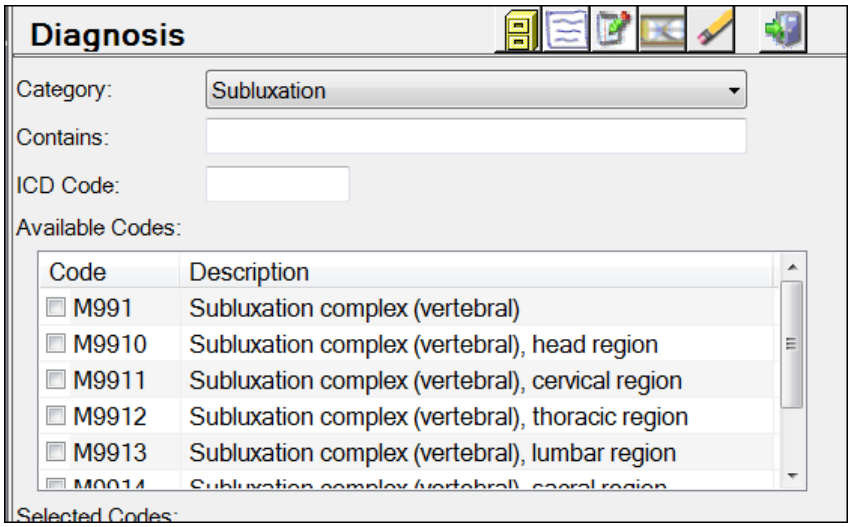
Categories

Categories will help to reduce the amount of searching required when looking for specific codes.

1. To create a category select **Categories**, then **New**.
2. Type a description for your category and select **Save**.
3. Highlight the new category and choose **Mapping**.
4. Choose items on the right individually or use the Windows shortcut keys Shift-select or Ctrl-select to highlight and select diagnostic codes.
5. Select the left arrow button to move the selections into the left column.
6. Re-position items using the **up** and **down** arrows.
7. Select **Close**. The new information is automatically saved.



Once created Categories can be chosen from Diagnosis in SOAP and Exams. Only items selected are visible in the codes selection screen.



Employees

The Employees area is where you create logins for ChiroWrite users.

Select **New** or **Edit**. Complete the required fields. The *Security Level* drop down box is populated with information previously created under **Administration, System Configuration,** and **Security.**

Closed is only used when this user is no longer valid and does not need to access ChiroWrite.

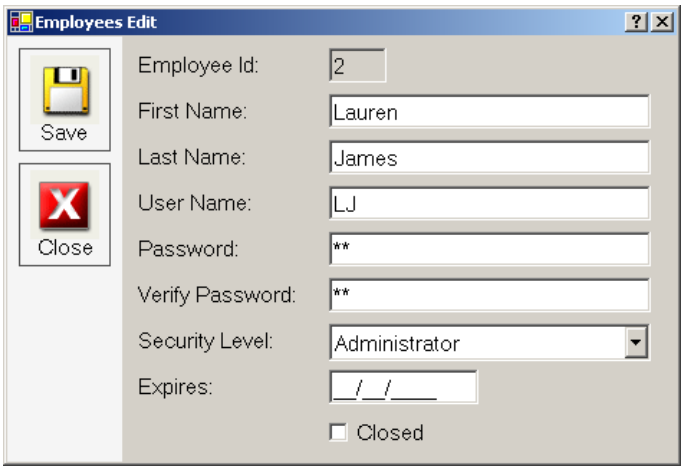


Image Types

This area allows you to detail the types of images that are available for viewing. These can include but are not limited to x-rays, patient intake forms, consent forms, scanned documents, etc.

Select **Administration, Image Types**, select **New.** Type a desripton, a path, and checkmark **Copy images to ChiroWrite directory** if you would like all of these items located in the images directory on the server. Click **Save**.

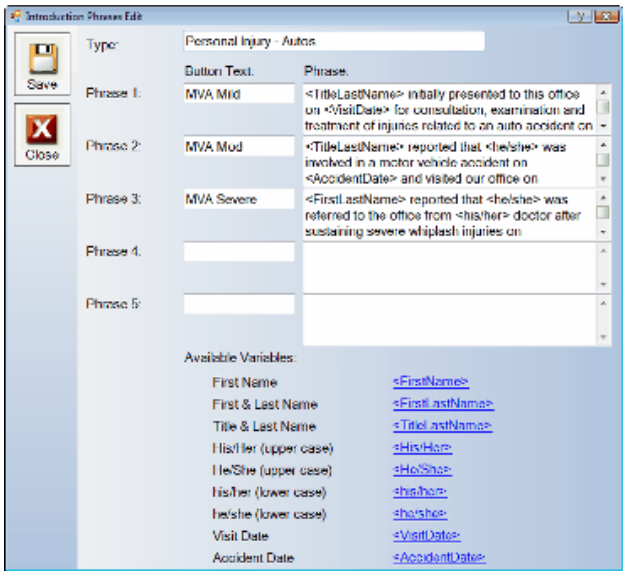
To edit Image Types choose an item in the list and select **Edit**. Make any necessary changes and select **Save**.

Narratives

This area of ChiroWrite allows you to create and edit default phrases that you can add to patient reports. Creating customized phrases is one of the most popular functions of the software. ChiroWrite provides the ability to create phrase types and introductory, prognosis and ending phrases for the reports system.

Edit an Introduction Phrase

1. Select **Administration**, **Narratives**, **Introduction Phrases**.
2. Highlight the phrase and select the **Edit** button.



3. The system allows the creation of up to five phrases per prognosis. Each phrase that is listed has an area called *Button Text.* Enter the name that you want to appear on the button in the system.

4. The next step is to edit or create additional phrases for this topic. Type the phrase and use the Available Variables shown at the bottom of the window to have the system automatically fill in the clients name, visit date, accident date, etc. As you type your phrase you can select on the blue link next to the available variable you would like to use and it will be automatically entered into the phrase.

☑ Phrases must be typed in complete sentences.

5. When you are finished select **Save**.

6. Select **Close**.

Create a New Introduction Phrase Type

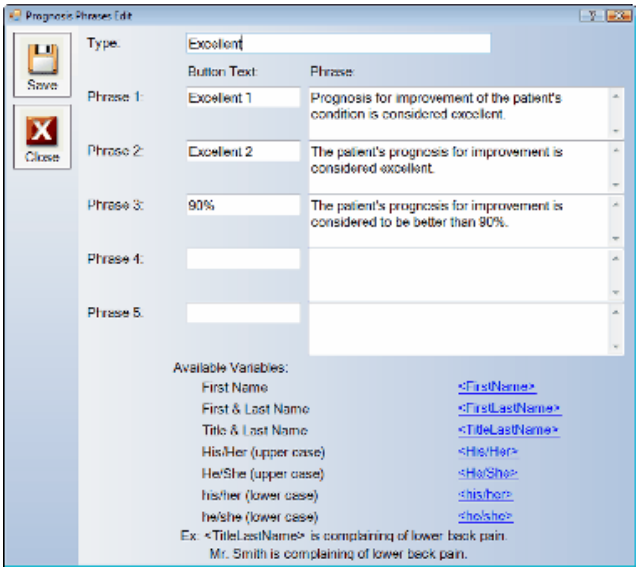
1. Select **Administration**, **Narratives**, **Introduction Phrases**.
2. Select the **Types** button.
3. Select **New** at the *Introduction Types* window.
4. Enter a description and select **Save** when you are finished.
5. Select **Close**.

Edit an Introduction Phrase Type

1. Select **Administration**, **Narratives**, **Introduction Phrases.**
2. Select the **Types** button.
3. Highlight the Phrase Type and select **Edit**.
4. Select **Save**.
5. Select **Close**.

Edit a Prognosis Phrase

1. Choose **Administration**, **Narratives, Prognosis Phrases**.
2. Highlight the Prognosis and select **Edit.**



3. The system allows the creation of up to five phrases per Introduction. Each phrase has an area called *Button Text* to enter the name that you want to appear on the button in the system.

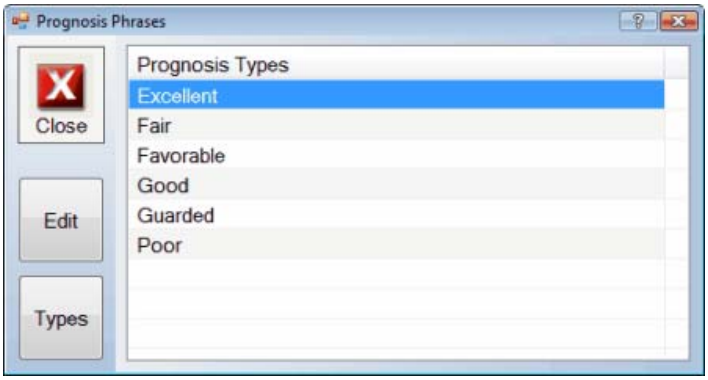
4. The next step is to edit or create additional phrases for this topic. Type the phrase and use the Available Variables shown at the bottom of the window to have the system automatically fill in the clients name, him/her, etc. As you type the phrase you can select on the blue links next to the variable and it will display in your phrase and automatically fill in the client information when you run reports.

☑ Phrases must be typed in complete sentences.

5. When you are finished, select **Save**.
6. Select **Close**.

Create a Prognosis Phrase Type

1. Choose **Administration, Narratives**, **Prognosis Phrases**.
2. Select a prognosis and select the **Types** button.



3. Select the **New** button and enter a description.
4. Select **Save**.
5. Select **Close**.

Edit a Prognosis Phrase Type

1. Choose **Administration**, **Narratives**, **Prognosis Phrases**.
2. Select a prognosis and select the **Types** button.
3. Select the **Edit** button.
4. Make the necessary changes and select the **Save** button.
5. Select **Close**.

Ending Phrases

Adding and editing ending phrases is done as above. Often phrases will be incomplete pending input of specific information for a particular patient.

Offices

The Office function details the office address.

Edit Office

1. Select **Administration**, **Offices**.
2. Select the office name, then **Edit.**
3. Make the necessary changes and select **Save**.
4. Select **Close**.

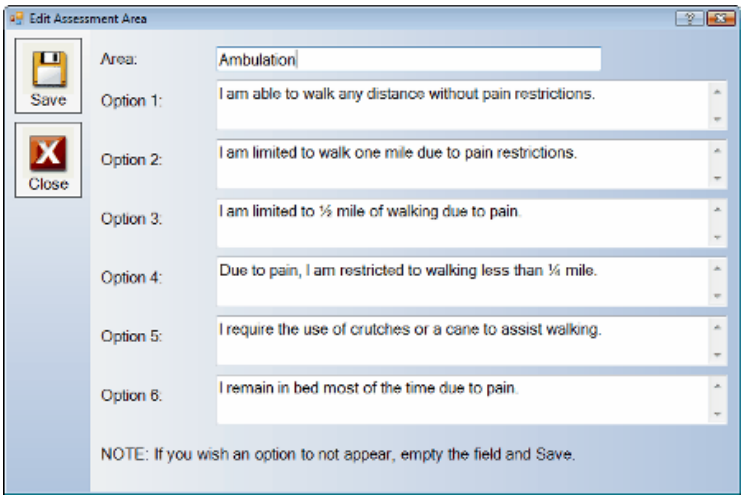
Outcome Assessment

Daily Living Assessment – ChiroWrite

The Daily Living Assessment Administration function allows you to customize the questionnaire options for the patient when assessing their functionality and pain.

Edit a Daily Living Assessment

1. Select **Administration**, **Outcome Assessment** , **Daily Living Assessment - ChiroWrite Standard**.
2. Highlight the assessment area and select **Edit**.



3. Edit or type the sentences that you would like to appear.

☑ Options must be typed in complete sentences.

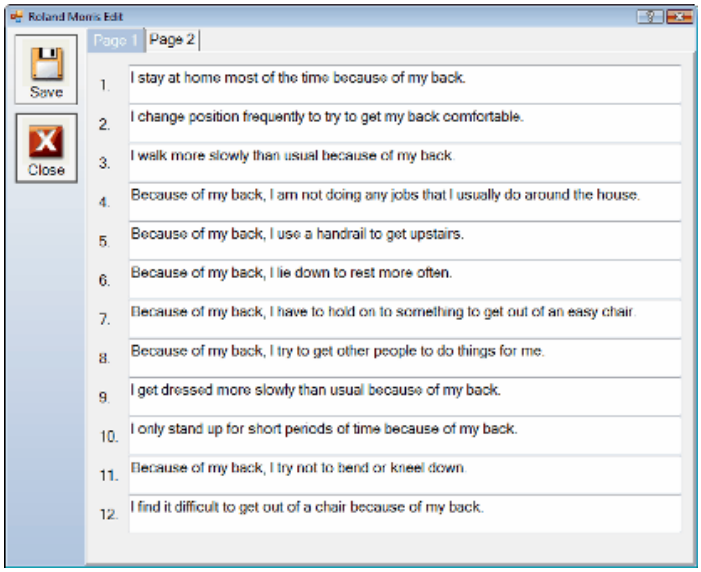
4. Select the **Save** button.
5. Select **Close**.

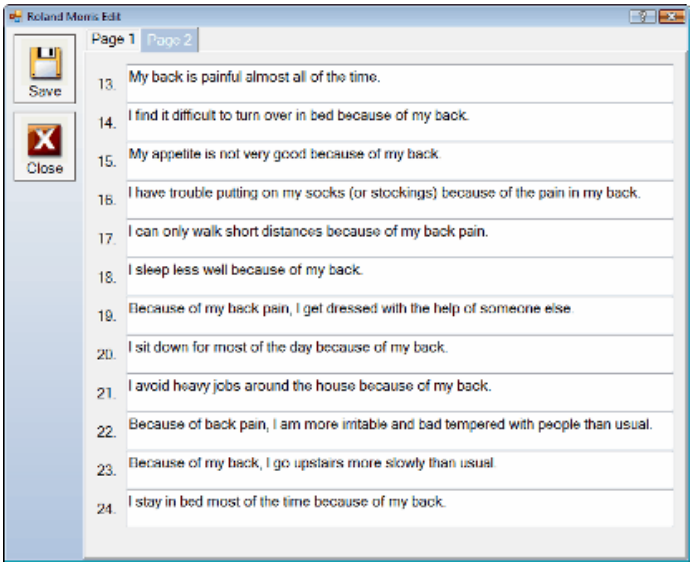
Roland Morris Questionnaire

The Roland Morris Questionnaire assessment options can be customized to assess the patient's functionality and pain.

Edit a Roland Morris Questionnaire

1. Select **Administration, Outcome Assessment**, **Roland Morris Questionnaire**. There are two pages of assessment screens as shown below:





2. Edit or type the sentences for the questionnaire.
3. Select the **Save** button.
4. Select **Close**.

Providers

Providers lists all the practitioners licensed to use ChiroWrite. Select the provider and choose **Edit.** Most fields are not editable in the Provider screen. Call support for additions and deletions.

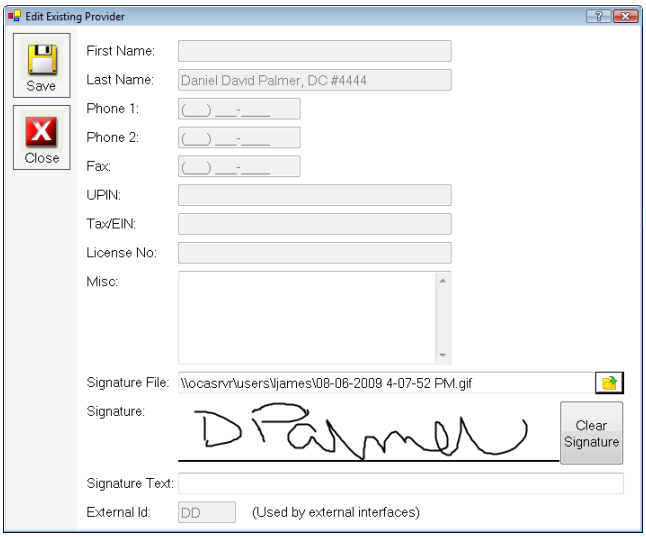
Provider signatures can be added to patient notes and narratives. This is useful when another practitioner is treating your patient. Signatures are located under the **Administration** menu, **Providers**.

Select the provider and choose **Edit.** Most fields in the Provider screen cannot be altered but at the bottom you can choose to:

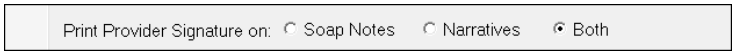
- add a digitized signature on file. Click the **browse** icon to locate and select the file

- write a signature into the area provided
- type a signature text to use.

Once you have made your selection, click **Save**, **Close**.



To activate the signature so it will appear on notes and reports you must turn the signature option on under **Administration, System Configuration, Defaults, Global 3**. Select the option of choice.



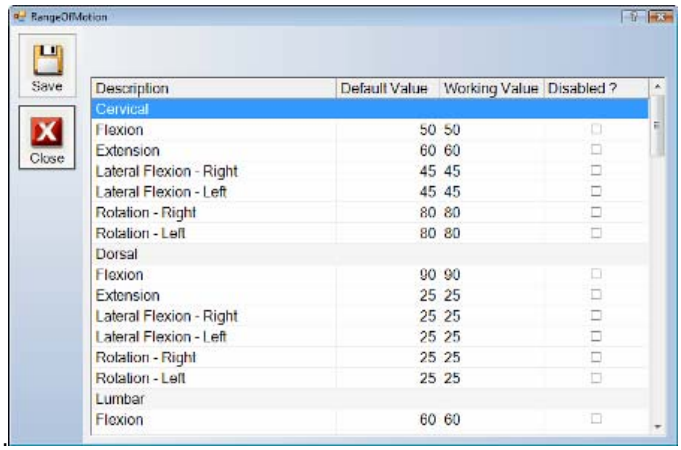
Range of Motion

When recording results from Range of Motion tests during a patient exam, a default value is provided. If the default values are not acceptable for your patients this area allows the creation of a working value. You also have the option to disable items listed.

Edit a Range of Motion

1. Select **Administration**, **Range of Motion**.

- Description Column: Name of the Range of Motion test.
- Default Value: The predefined value in the system.
- Working Value: Select the Working Value to make changes and enter the new value.
- Disabled: Select this box if you want to remove an item from the Range of Motion exam.



☑ Disabled items still appear but are inactive.

2. Make the necessary changes and select the **Save** button, then **Close**.

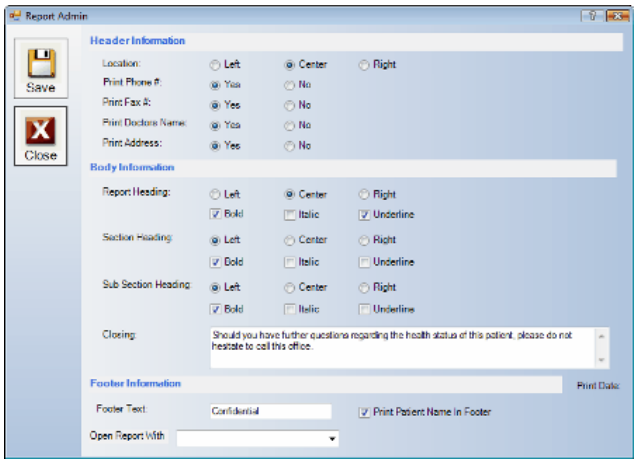
Reports

The reports area enables you to configure and create reports and letters.

Reports Admin

Choices made on this tab allow you to customize the appearance of reports.

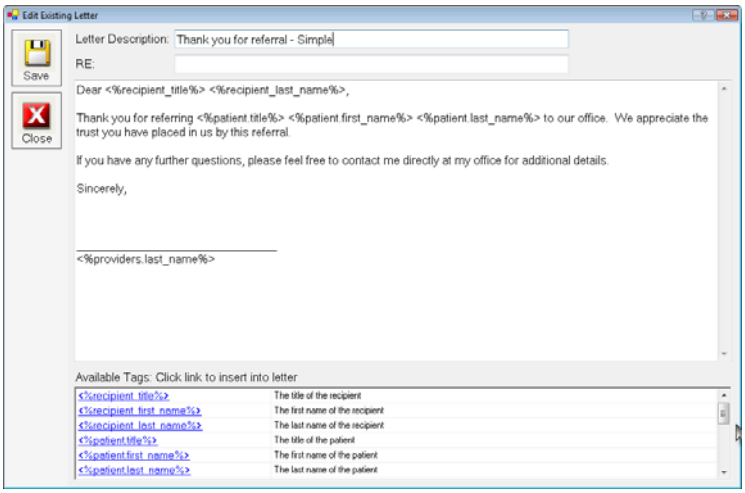
1. Select **Administration**, **Reports, Reports Admin**.



2. Make any necessary changes.
3. Select **Save,** then **Close**.

Letters

ChiroWrite offers the ability to create form letters and templates using the supplied dynamic tags. Tags are fields you select that will populate form letters or templates with personalized information from your patient files. For example, if you select the field <%recipient first name%>, the first name of the selected patient will be typed into the letter.



To create a new letter:

1. Select **Administration**, **Reports, Letters**.
2. Choose **New**.
3. Type a description into the *Letter Description* field.
4. Type the body of your letter using the supplied 'tags' listed at the bottom of the screen. A description is listed to the right of each tag.
5. Select **Save,** then **Close**.

Letters are accessed by selecting the Patient Reporting icon from the patient travel card screen. In some cases you may be required to select a date or range of dates prior to running the letter.

OCA
20 Victoria StreetUnit 200
Toronto, ON M1V 2L3
(416) 860-7199
Doctor: Daniel David Palmer, DC #4444

19/06/2009

John Smith
1 Yonge Street
Toronto, ON M5C 1Y5

Dear Dr. Smith,

Thank you for referring Ms. Brenda Lloyd to our office. We appreciate the trust you have placed in us by this referral.

If you have any further questions, please feel free to contact me directly at my office for additional details.

Sincerely,

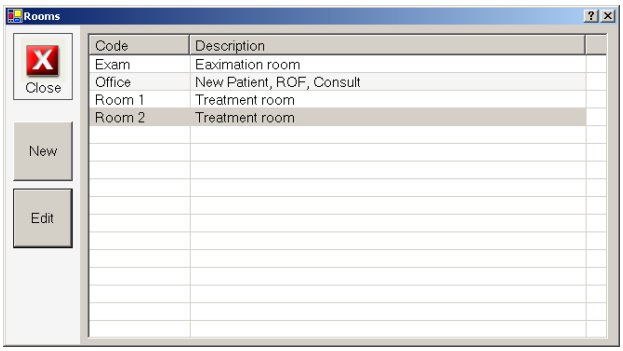
_____
Daniel David Palmer, DC #4444

☑ If you see XXXXX instead of information on printed material it is an indicator that the tag area selected was not filled-in in the patient file.

Rooms

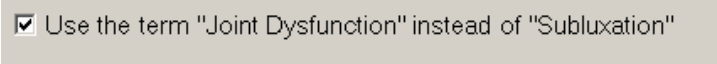
An option exists to list the rooms available in your location so they can be assigned to Current Patients (PMP users) or Check In/Out.

Select **New** or **Edit** and add or change information as necessary.



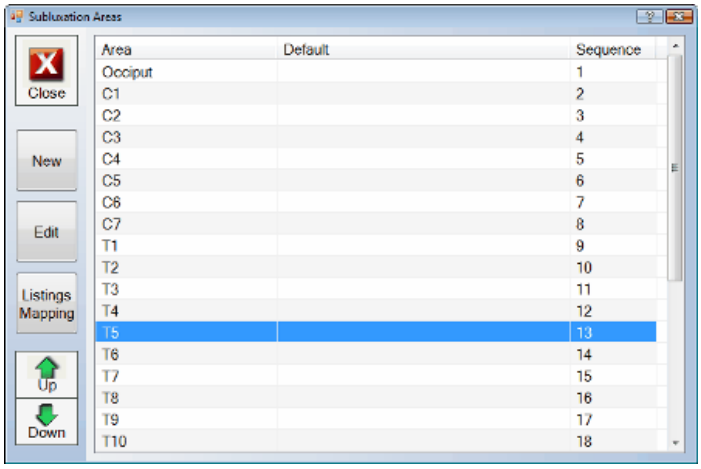
Subluxation or Joint Dysfunction

The option to use the term Subluxation or Joint Dysfunction has been added. Access this option from the **Administration** menu**, System Configuration, Defaults, Global 3.**



Create New Subluxation or Joint Dysfunction Area

1. Select **Administration**, **Subluxation** or **Joint Dysfunction**, **Areas**.

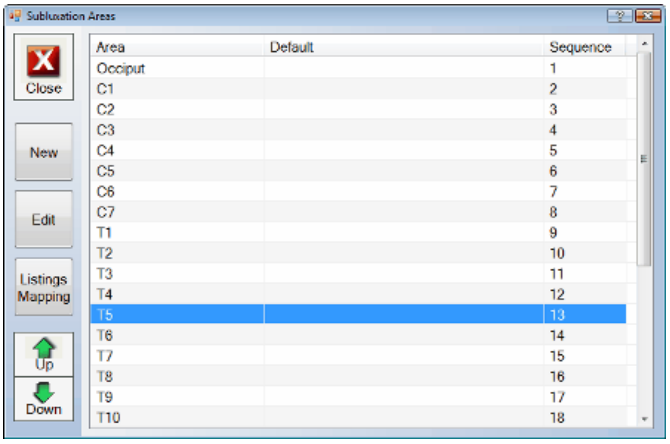


2. Select **New**.
3. Enter the **Area**.
4. Enter a **Default value**.

5. Select a **Status** of Active or Inactive.
6. Select the **Save** button.
7. Select **Close**.

Edit a Subluxation or Joint Dysfunction Area

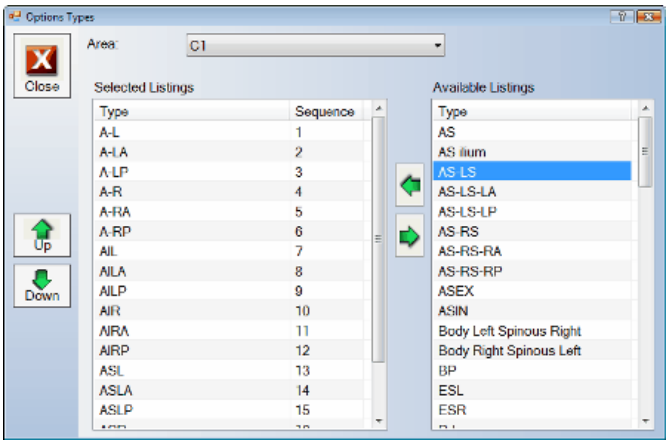
1. Select **Administration**, **Subluxation** or **Joint Dysfunction**, **Areas**.



2. Highlight an area and select **Edit.**
3. Make the necessary changes and select the **Save** button.
4. Select **Close**.

Mapping Subluxation or Joint Dysfunction Area

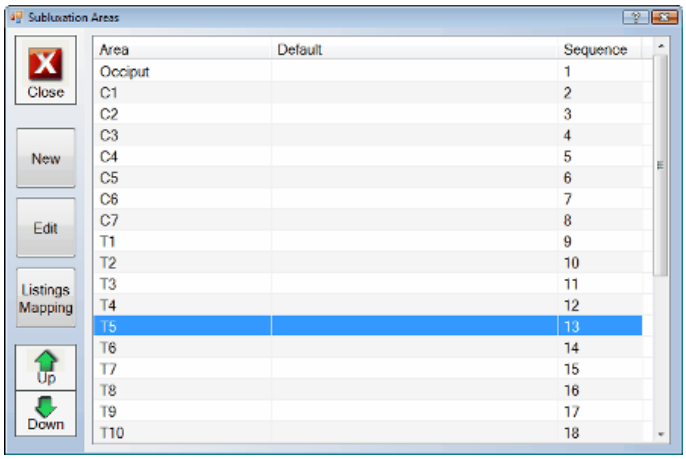
1. Select **Administration, Subluxation** or **Joint Dysfunction**, **Areas**.
2. Highlight the listing and select the **Listings Mapping** button.
3. Highlight an item under the *Available Listings* in the right window. Select the **Left** or **Right** arrow to move the items back and forth between the two windows.



4. Select **Close**.

Change Order of Subluxation or Joint Dysfunction Areas

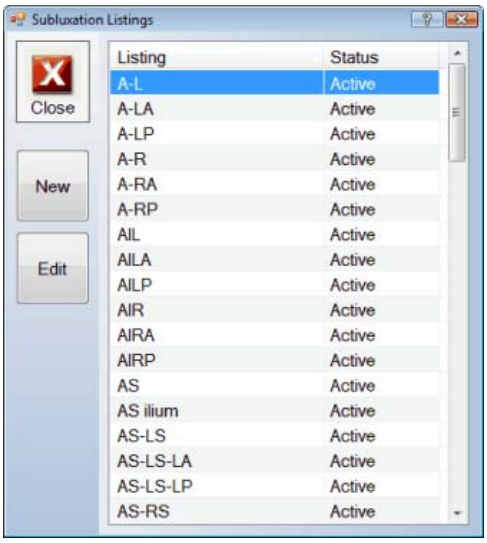
1. Select **Administration**, **Subluxation or Joint Dysfunction**, **Areas**.



2. Highlight the entry to move and select the **Up** or **Down** button.
3. Select the **Close** button when finished.

Create a New Subluxation or Joint Dysfunction Listing

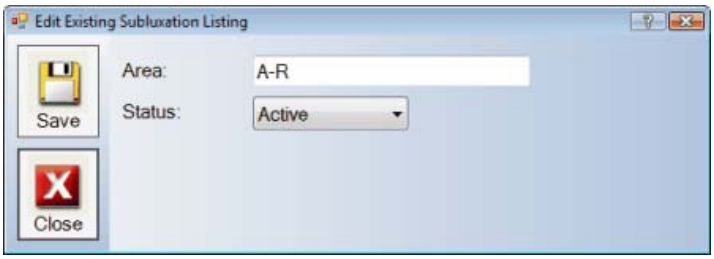
1. Select **Administration, Subluxation or Joint Dysfunction**, **Listing**.



2. Select the **New** button.
3. Enter the **Listing**.
4. Select a **Status**.
5. Select the **Save** button.
6. Select **Close**.

Edit a Subluxation or Joint Dysfunction Listing

1. Select **Administration**, **Subluxation or Joint Dysfunction**, **Listings**.
2. Highlight the listing and select **Edit**.
3. Make necessary changes.



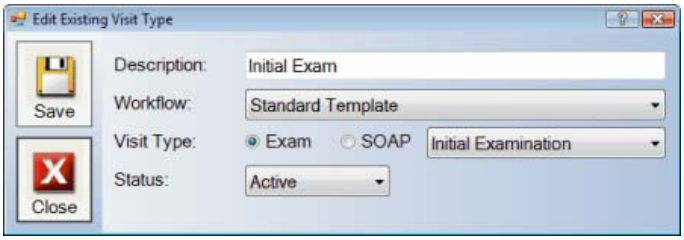
4. Select the **Save** button.
5. Select **Close.**

Visit Reason

The system provides several default visit reasons including: exam, final exam, initial exam, scheduled and unscheduled visits. The system offers the ability to edit the existing visit reasons or create new ones.

Create a New Visit Reason

1. Select **Administration**, **Visit Reasons**.
2. Select **New** and the window below displays.

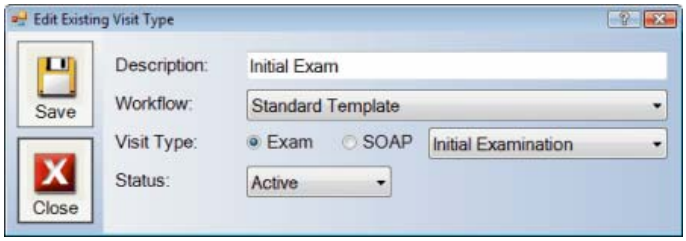


☑ The Description and Status fields are required to add a new Visit Reason to the system.

3. Enter the **Description**.
4. Select the **Workflow type** from the drop down menu. This determines the forms that will be accessible when entering notes for this patient.
5. Select the radio button next to **Exam** or **SOAP**.
6. Choose **Initial**, **Re-examination** or **Final examination** from the drop down menu.
7. Select **Status** as Active or Inactive.
8. Select the **Save** button.
9. Select **Close**.

Edit a Visit Reason

1. Select **Administration**, **Visit Reasons**.
2. Highlight the visit type and select **Edit**.



3. Make the necessary changes and select the **Save** button.
4. Select **Close**, then **Close** again to exit.

System Configuration

The System configuration allows you to do the following:

- Setup System Defaults
- Create and Edit User Permissions
- Backup and Restore Data
- Import and Export Data

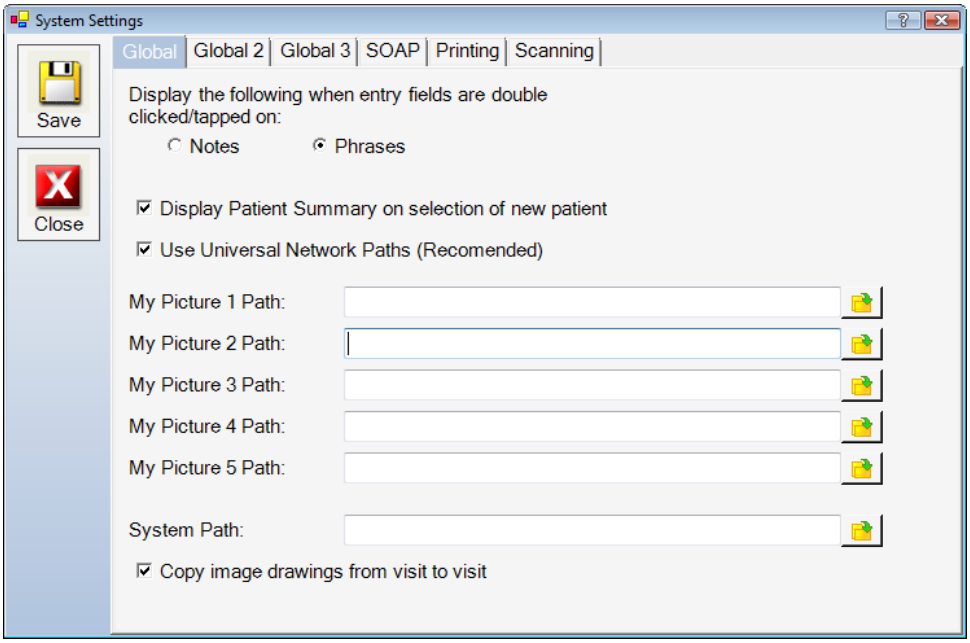
The system configuration allows you to make changes to the Global, Global 2, Global 3, SOAP, Printing, and Scanning windows. Below are instructions on how to access these options so that you can better see what items are customizable.

Defaults

Select **Administration**, **System Configuration**, **Defaults**.

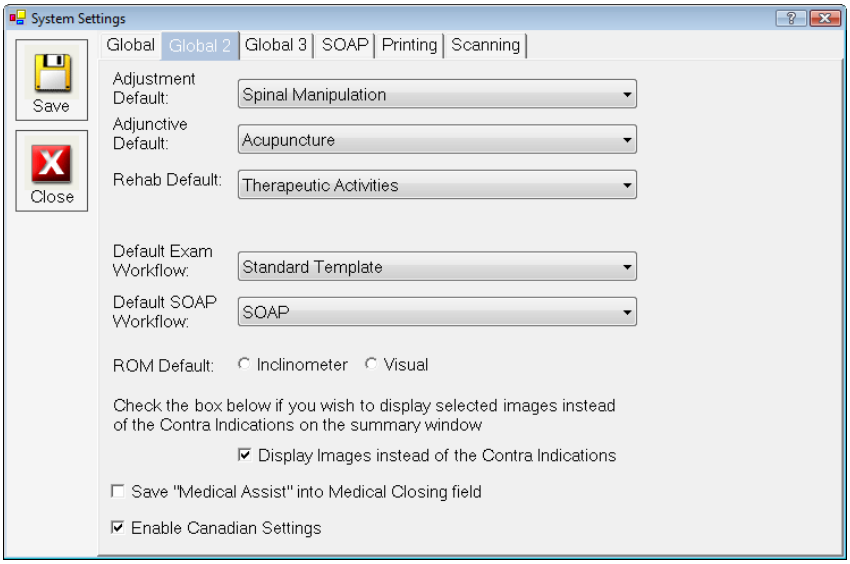
Global: The option for Notes or Phases allows you to choose how data entry fields behave. Data entry fields are the peach coloured text boxes where users can add notes. If you choose phrases you will have access to the WorxPhrases you have created.

Picture paths refer to the location of your scanned pictures so that they are accessible in patient files.

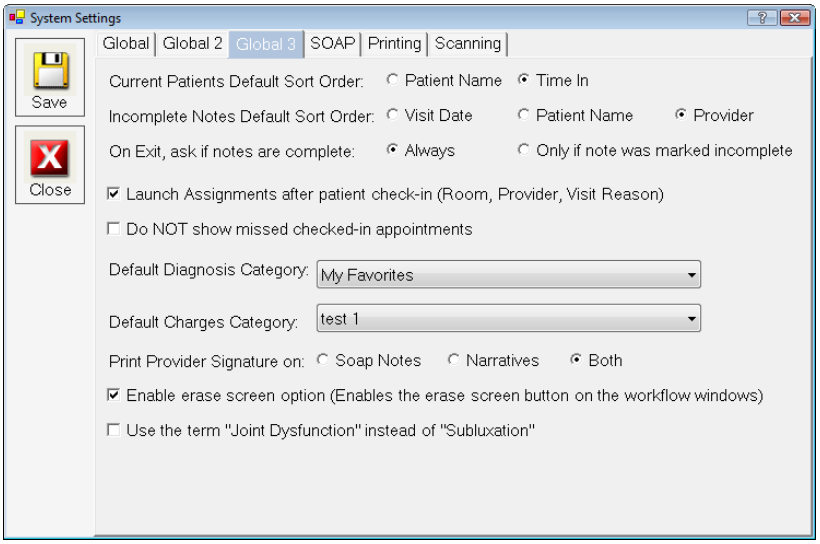


Global 2: Choose defaults from the drop down options to save time when creating patient notes. These options can be changed at any time.

Be sure to checkmark *Enable Canadian Settings.*



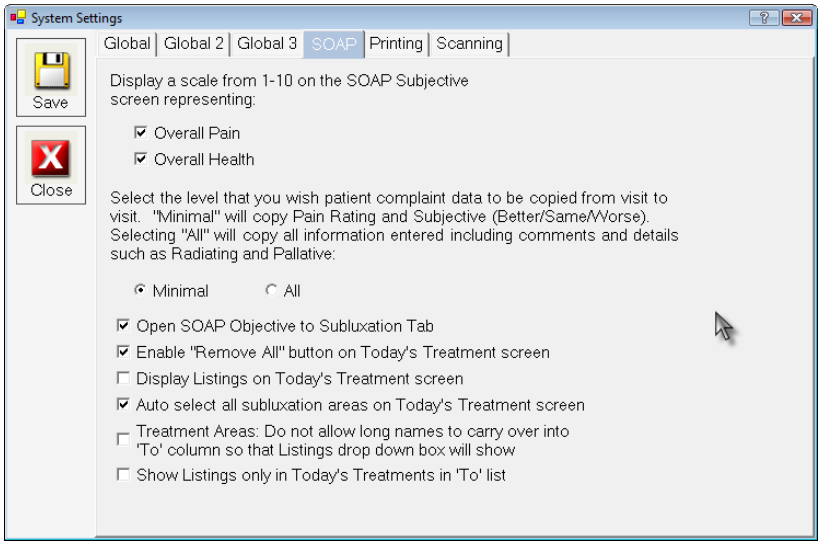
Global 3: Choose a patient sort order and other options according to your preferences.



☑ PMP Users: Select the option **Always** beside *On Exit, ask if notes are complete:*

☑ PMP Users: If you are sending 'Arrived' patients into the **Current Patients** menu, do **not** select *Do NOT show missed checked-in appointments* or patients will not move to the incomplete Notes section once marked as 'Done'.

The **SOAP** and **Printing** tabs allow for addition customization. The scanner tab is used only if you have a scanner.



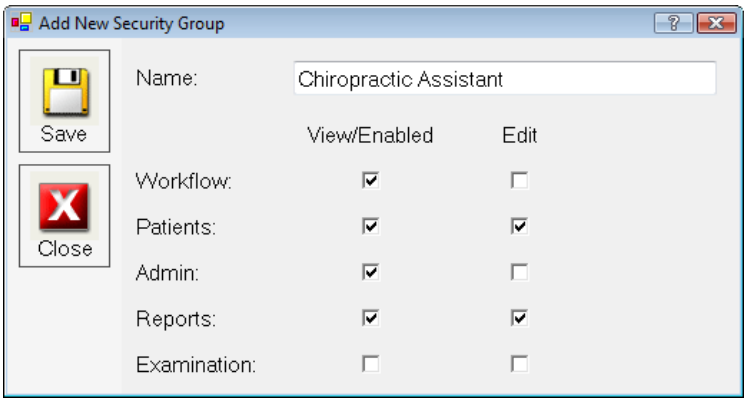
After making changes select **Save**, then **Close**.

Security

The Security menu allows you to define rights for different groups of users to give or limit access to areas of ChiroWrite. Each user of the system should have his or her own login ID but not all users need the same rights within the program.

Create a New Security Group

1. Select **Administration, System Configuration**, **Security**.
2. Choose **New**.
3. Give the group a name, eg. Chiropractic Assistant.
4. Select the security features for the group by selecting the appropriate checkboxes.



5. When you are finished, select **Save**.
6. Select **Close,** then **Close** again.

Edit an Existing Security Group

1. Select **Administration, System Configuration**, **Security**.
2. Highlight the group and select the **Edit** button.
3. Make the necessary changes and select **Close**.

☑ Now that the groups are created you can assign the appropriate security level to each of the users created under Employees.

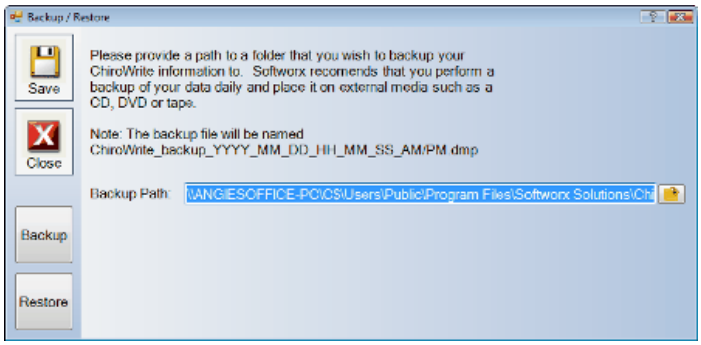
Backup/Restore

Warning: The software backup function is vital to the successful use of the program. If you have any trouble or need assistance with the backup or system restore, please call support at 1-800-561-7361.

☑ Backups must be done from the server computer. Backups take seconds; repeat the process to another location to ensure you have an additional copy if difficulty is encountered with the first.

☑ Scanned documents, radiographs, and pictures are **not** included in the ChiroWrite backup. Create a folder and backup these files yourself. Consider engaging a company to automate, and/or perform remote backups for you.

1. Select **Administration, System Configuration**, **Backup/Restore**.



2. A default path is displayed. If you want to save to or restore from an alternate location, select the **Browse** button and navigate to the proper location.
3. Select either the **Backup** or the **Restore** button.
4. Select **Save**.
5. Select the **Close** button.

☑ We recommend that you create a backup on a USB stick and store safely off site. Do not depend only on a hard disk backup.

Automate Your Backups

Currently, backups need to be performed from within ChiroWrite. This requires you to remember to do them. This process can now be automated so that Windows automatically creates the backup file at a specified time. To do this, follow these steps. They have been created for Windows XP.

1. **Copy ChiroWrite backup module** – On the server machine, navigate to the latest ChiroWrite release. This will be found under C:\Program Files\Softworx Solutions\ChiroWrite. In this folder you will see several other folders. **Look for the folder that contains the highest number.** This release will be found under the folder 1.4.0.0. Copy the files “CWBackup.exe” and “chirowrite.exe.config” to the folder C:\Program Files\Softworx Solutions\ChiroWrite.
2. **Schedule Task** – Go to Windows control panel and find “Scheduled Tasks”. Double Select to open the scheduled tasks and then double select the “Add Scheduled Task” row. Follow the Wizard instructions by first indicating the program to run. Select browse to find the program and look in C:\Program Files\Softworx Solutions\ChiroWrite for CWBackup.exe. Then select the time to run the backup program. You should schedule the backup to run at least once a day. Make sure to schedule the backup for a time when the computer is on, if you turn it off.

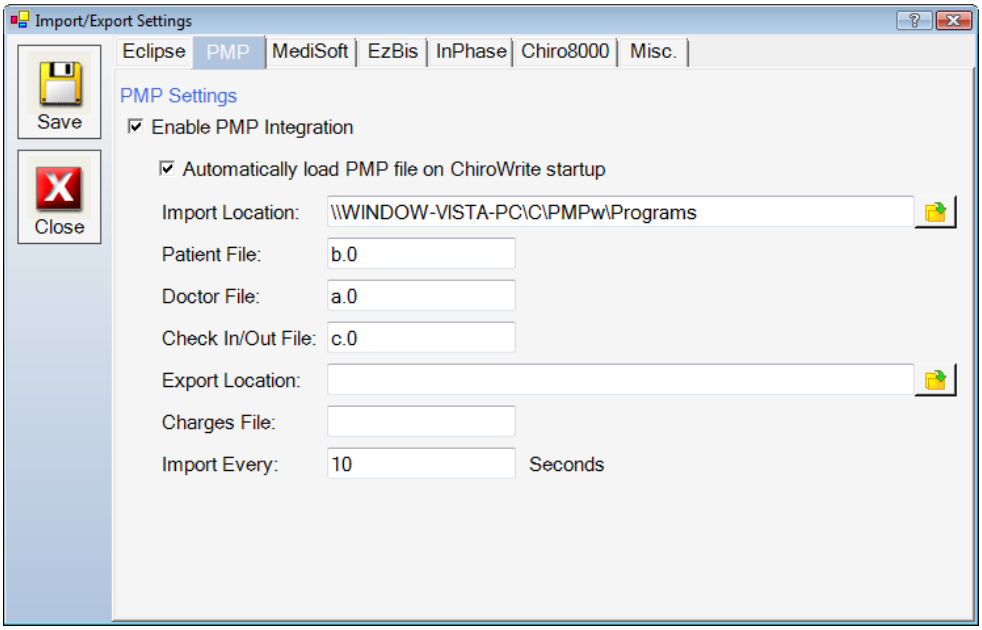
☑ Vista users will have to make slight modifications. If you encounter difficulties contact support at 1-800-561-7361.

Import/Export

ChiroWrite allows the ability to import or export data. PMP Users should configure the PMP tab to the settings listed below.

The *Import Location* must reflect the PMP computer where patients are marked arrived; usually the reception or front desk computer.

☑ PMP Users: ChiroWrite must be installed on the PMP computer where patients are marked arrived.



Treatment Configuration

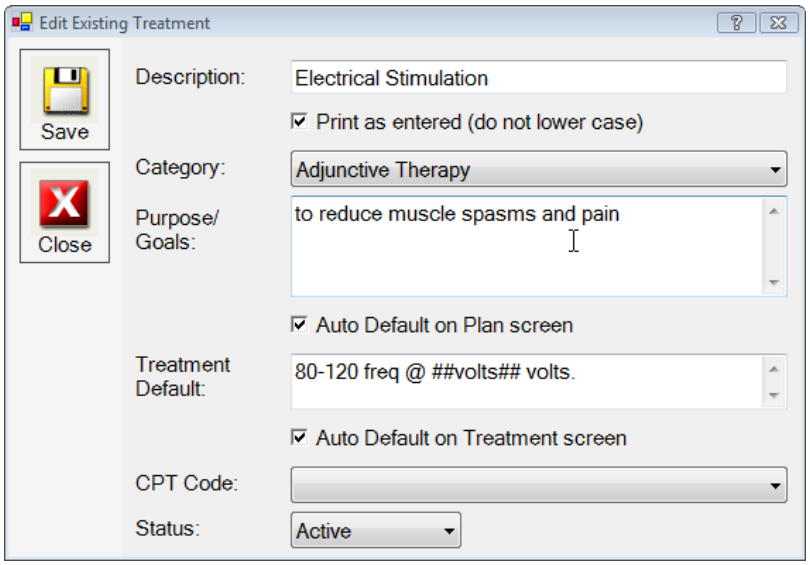
Treatment Configuration allows you to customize treatment offered in your office. This information is used when inputting SOAP and other types of notes.

Treatments

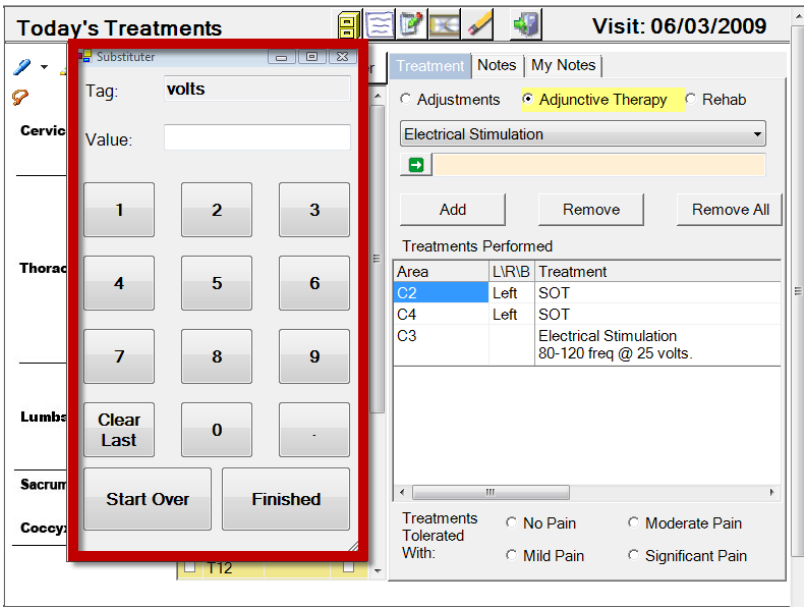
This is where you add services.

Select **Administration, Treatment Configuration**, **Treatments**.

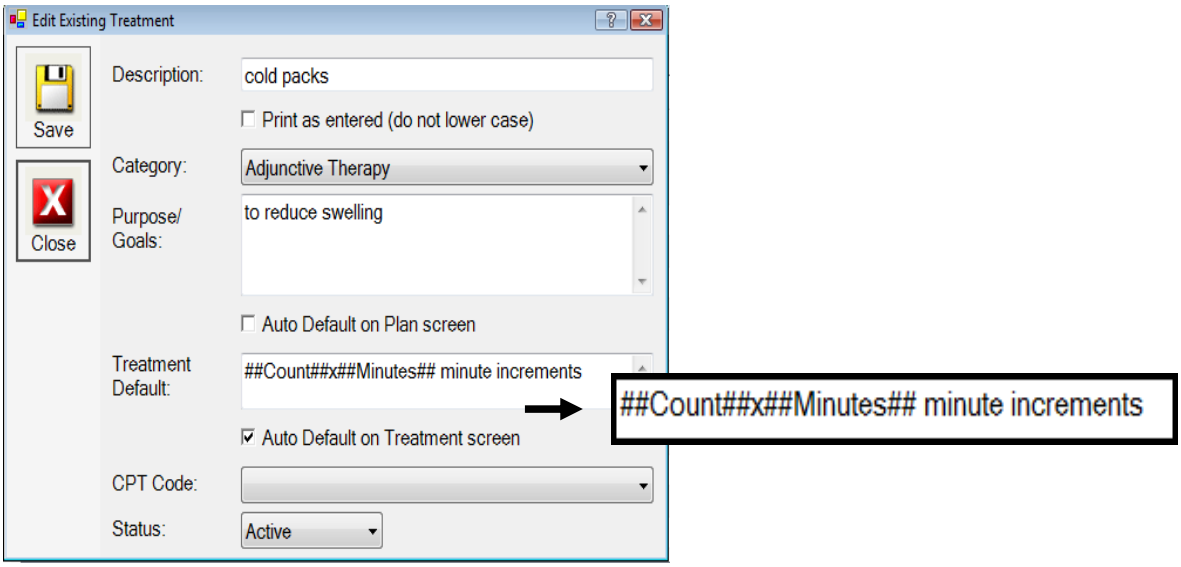
1. To add a new Treatment select **New**.
2. Type a description.
3. Select the *Category* from the drop down list.
4. Type the *Purpose/Goals*.
5. Selecting *Auto Default on Plan screen* will automatically input the details typed into Purpose/Goals onto the patient Note when selecting this item. If you do not checkmark *Auto Default on Plan screen* the field will be blank by default but can still be selected manually.
6. The treatment Default allows you to put in information about the details of the specified treatment. If you type two pound (or number signs) eg. ## followed by a word, a substituter screen will appear allowing specific input during treatment.



For instance, the Treatment Default in the above depiction is 80-120 freq @ ##volts## volts. The "##volts##' will pull the substituter up during processing to allow the volts to be entered.



To have the substituter appear for multiple items populate the Treatment Default screen with an x between each item.



The *Status* determines whether the Treatment is visible during examinations and notes. Select **Active** to show this item. Select **Save** then **Close**.

To Edit an existing Treatment select the item in question followed by **Edit**. Make the required changes and **Save,** then **Close**.

Treatment Areas

The Treatment Area defines specific body areas treated in your clinic.

Select **Administration, Treatment Configuration**, **Treatment Areas**.

To add a new Treatment Area select **New**. Type the area, select the *Category* and *Group* from the drop down lists. The *Status* determines whether the Treatment is visible during examinations and notes. Select **Active** to show this item. Select **Save** then **Close**.

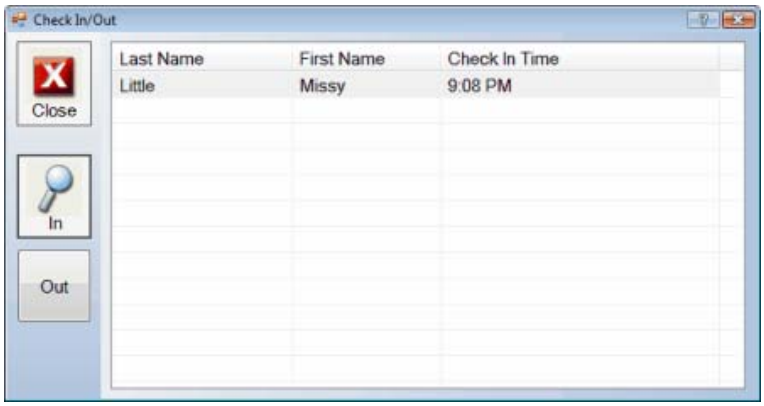
To Edit a Treatment Area select the item in question followed by **Edit**. Make the required changes and **Save** then **Close**.

Office Activities

Office Activities allows checking patients in and out, gives a comprehensive list of the patients that received care during a specified time frame, and has the ability to configure and run reports not pertaining to a specific patient.

Check In a Patient

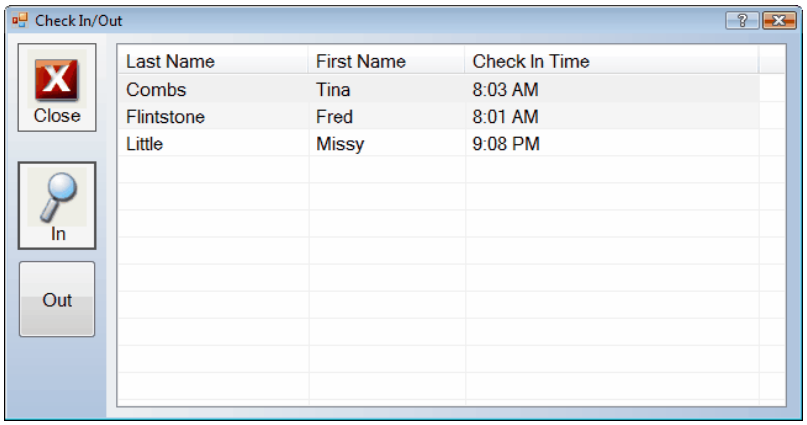
1. Select **Office Activities**, Check **In/Out**.



2. Select the **In** button to launch the search screen.
3. Search for and highlight the patient you want to check in.
4. Choose the **Select** button.
5. The *Check In Assignments* window appears allowing you to assign detailed information to this patient.
6. Select **Save**, then **Close**.

Check Patient Out

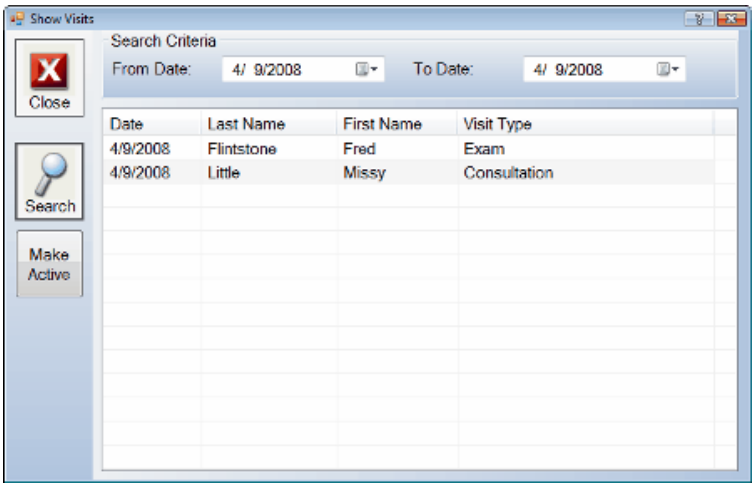
1. Select **Office Activities, Check In/Out**.
2. Highlight the patient you want to check out.



3. Select the **Out** button.
4. Select **Close**.

Show Daily Visit

1. Select **Office Activities**, **Show Daily Visits**.
2. Choose the date or date range for your Daily Visit list using the **Calendar** button.
3. Select **Search** and a list of patients for the dates specified will appear.



4. In order to make a patient active, highlight the name of the patient and select the **Make Active** button.
5. When you are finished, select **Close**.

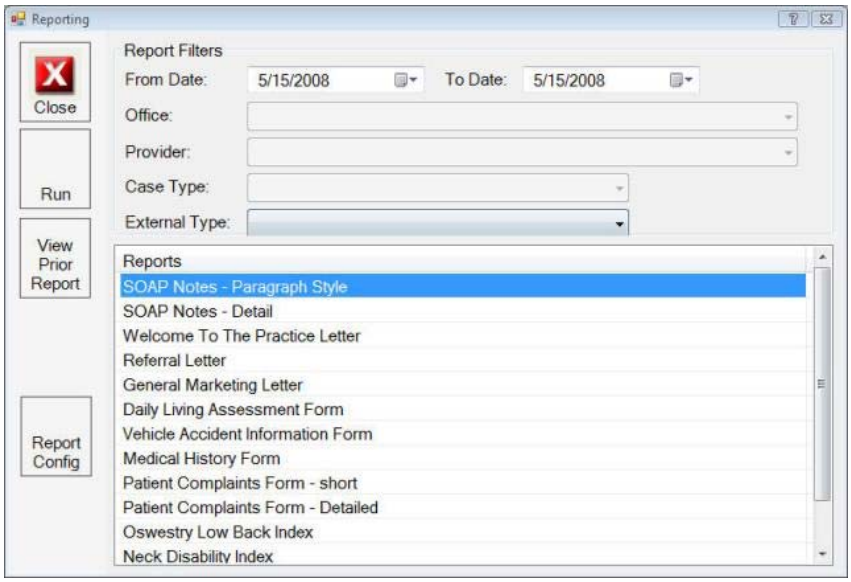
Reports

The reports menu provides reporting options that are not patient specific. Here you will find ChiroWrite's patient intake forms and reports that can be generated for the entire practice. For example, the Welcome to the Practice Letter is designed to work from the date range specified and produce a welcome letter for all patients that were added during that date range. The intake forms can be printed and given to patients to collect information from them while they are in the reception room.

- SOAP Notes - Paragraph Style
- SOAP Notes - Detail
- Welcome to the Practice Letter
- Referral Letter
- General Marketing Letter
- Daily Living Assessment Form - Patient Intake Form
- Vehicle Accident Information Form - Patient Intake Form
- Medical History Form - Patient Intake Form
- Patient Complaints Form – Short - Patient Intake Form
- Patient Complaints Form – Detailed - Patient Intake Form
- Oswestry Low Back Index - Patient Intake Form
- Neck Disability Index - Patient Intake Form
- Roland-Morris Questionnaire - Patient Intake Form

Run Reports

1. Select **Office Activities, Reports**.



2. Choose the **To** and **From** Dates for the Report.

3. Depending on which report is chosen you may need to select the Office, Provider, Case Type, and/or External Type from the drop down menu.

4. Select the Report.

5. Select the **Run** button and your report will display in Microsoft Word or Notepad.

View Prior Reports

1. Choose **Office Activities, Reports**.

2. Select **View Prior Report.**

3. A listing of prior reports that were generated on this computer will appear. You can then select a report to View, Mark As Sent, or Print.

4. Select **Close**.