Getting Started

Your guide to get up and running in ChiroWrite

Welcome!

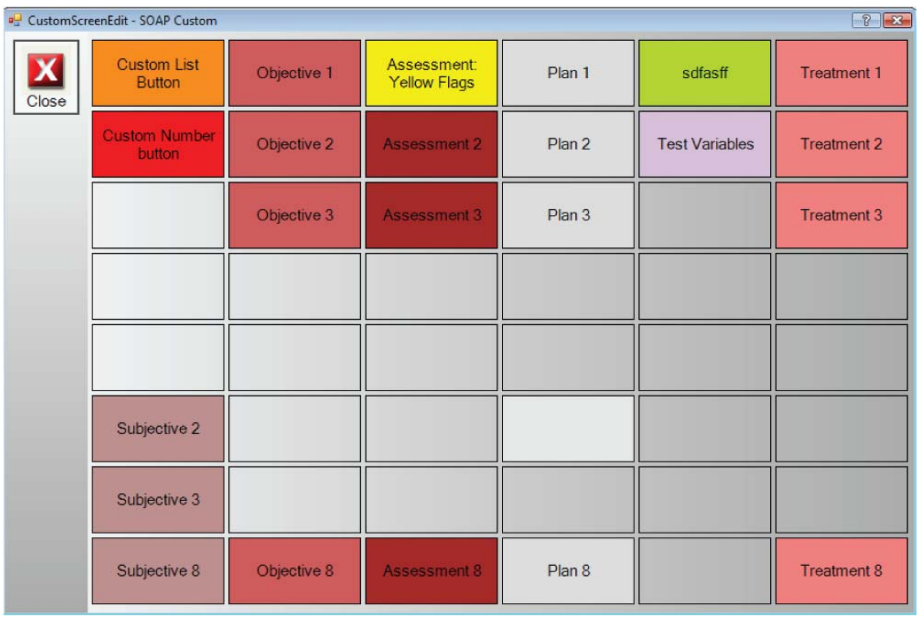
This is a quick start guide. It contains basic information about customizing your ChiroWrite and getting started.

Please feel free to share your comments and ideas with us.

ChiroWrite Custom Buttons

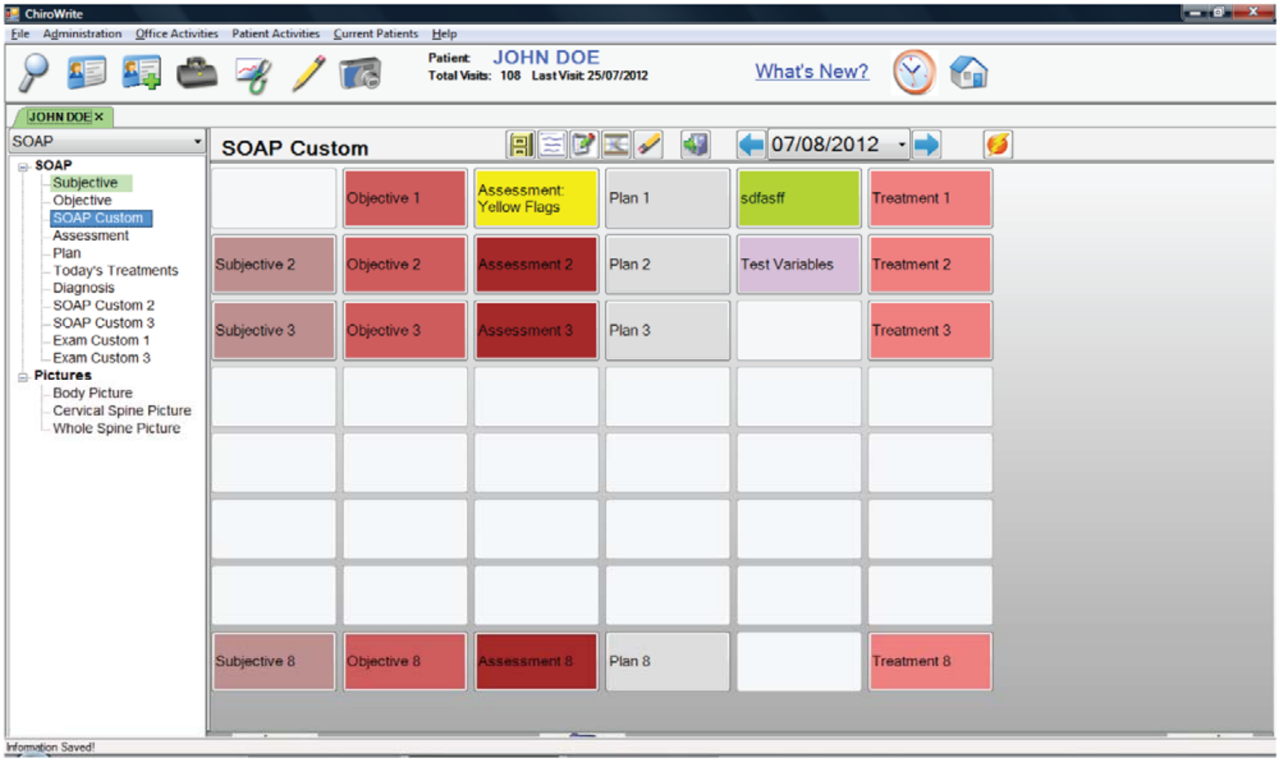
Purpose

The custom buttons are useful for adding information to your exams and SOAP notes. When a custom button is selected during an exam or SOAP, the information that is stored in the button is placed in your notes. Custom buttons can be used to streamline and add new tests, findings for your notes, or anything else you might want to add. Think of the custom buttons as blank templates for you to customize CW to your particular practice style.



Location

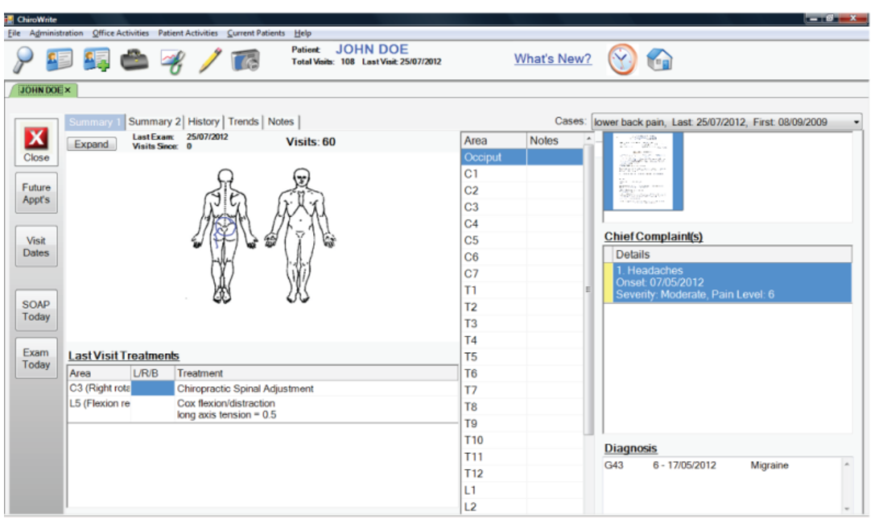
Custom buttons can be accessed in both exams and SOAP notes under the left side menu. The custom buttons are housed in 8x6 grids similar to the example below. There are 3 of these grids for exams and 4 for SOAP notes.



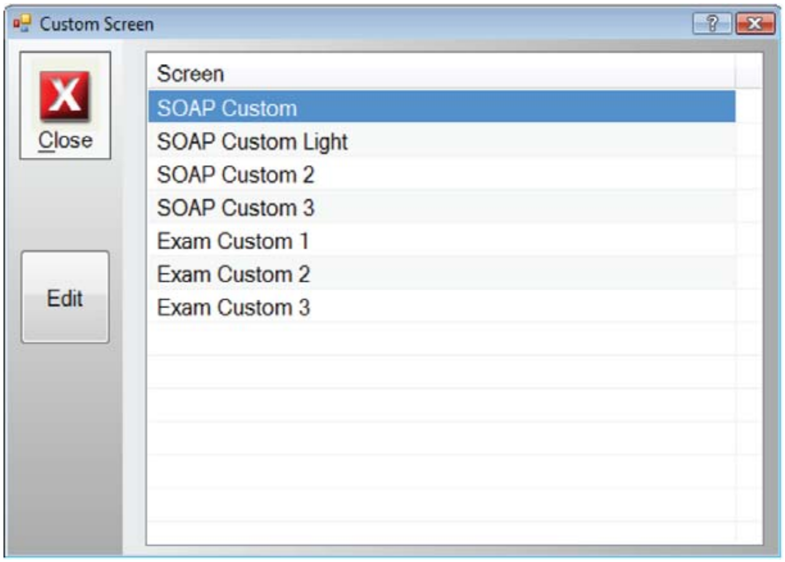
Customizing

The first example will highlight the setup of a SOAP custom button. Remember that the same process is used to configure the exam buttons.

Locate and click the **Administration** menu in the top left.

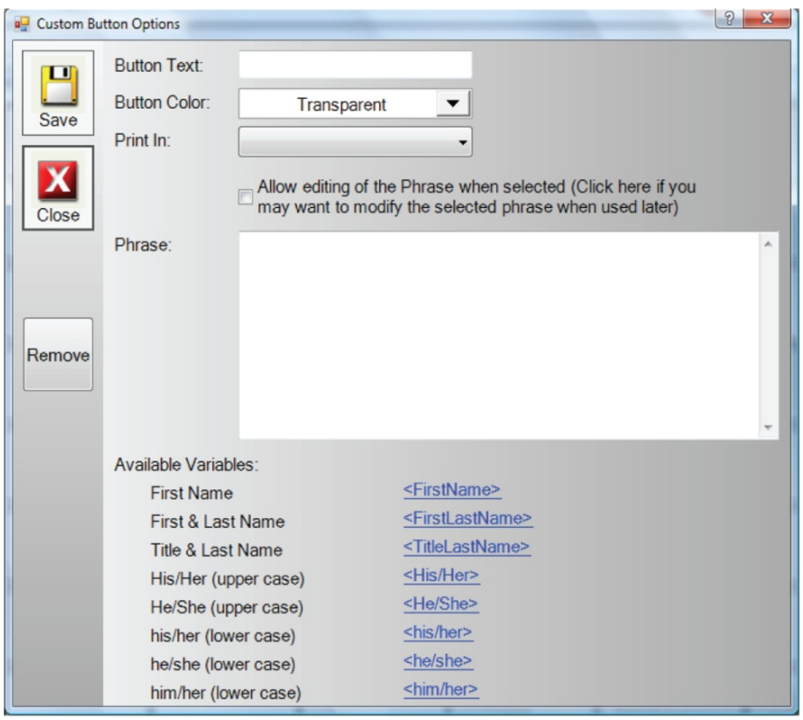


Choose **Administration, Custom Screens, SOAP Custom**.



Choose **SOAP Custom** and select **Edit**. You will be presented with a screen of buttons as shown above.

Select an empty button and the custom button options screen will appear. The Phrase box is where you enter any information that you want the button to add to your notes.



Button Text: This will be the name of the button.

Print In: This indicates which heading your custom button information will go under when you print a report.

Phrases: This is where you fill in the information that you want the custom button to store.

Available Variables: These options allow you to add specific patient information to your buttons.

Create a Custom Button

Custom buttons greatly reduce the amount of typing you will need to do during a patient visit. They require a bit of programming, so get ready for Programming 101 – it'll be simple, we promise!

List Button

Custom buttons allow you to have a list of findings on one button rather than selecting a button for each possibility. Below is how your list button would appear once set it up and selected during the patient visit. You would now press the correct item in the list.

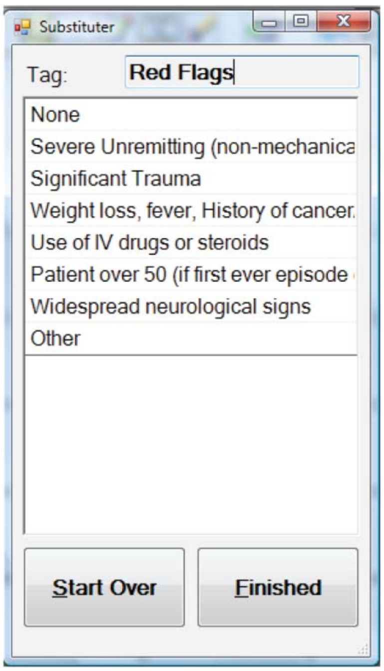
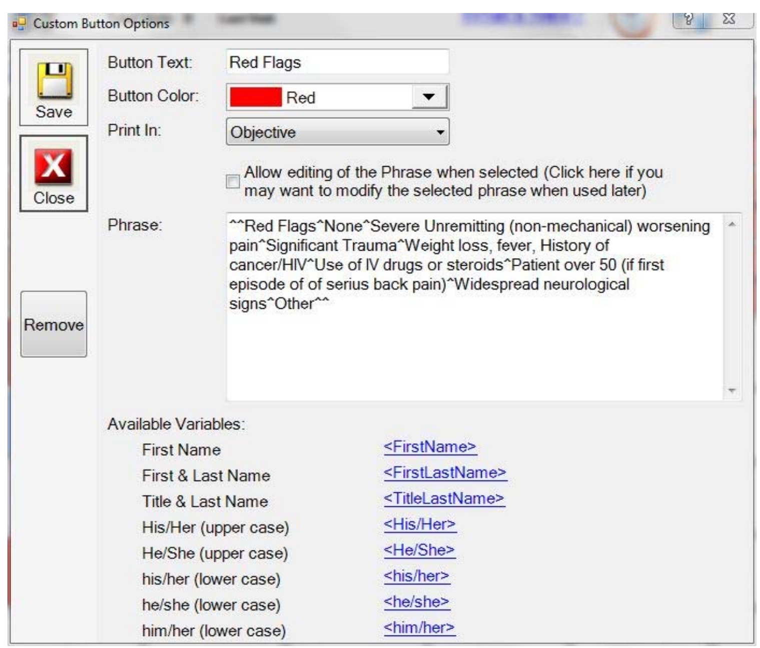


Figure 1

To create the list button let's make a button to record **Red Flags**.

In the *Custom Button Options* screen type or select the following information:

Button Text:	Red Flags
Colour:	your choice
Print In:	Objective



In the Phrase field we are inputting our programming script.

^ This character is called a Caret. Create this character by pressing **Shift** and **6** on your keyboard.

The use of double caret at the beginning of the phrase indicates we are creating a list.

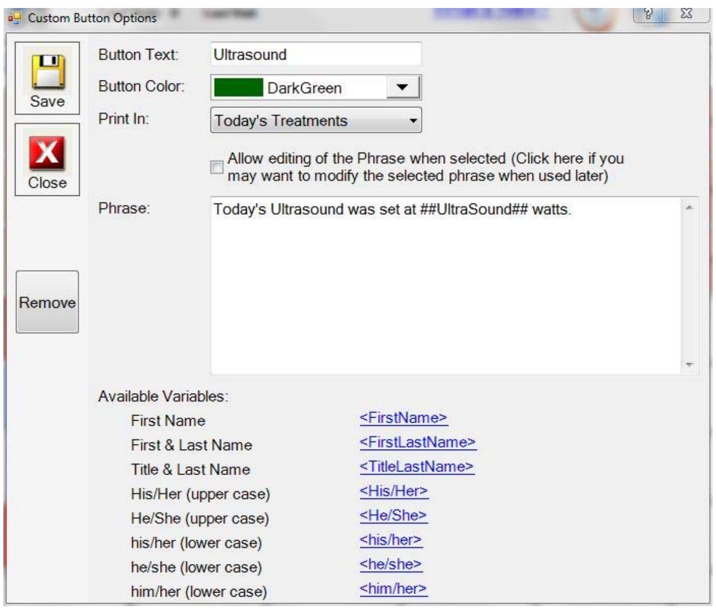
The first item typed is the tag (name of the list). A caret is positioned at the end of each item to identify another item in your list. End your phrase with 2 carets.

Select **Save.** Congratulations!

If you entered your list button properly, it will now be visible in the Custom Soap screen. When you click your custom list button a screen similar to the one in Figure 1. Make your selections and click **Finished**. Your red flags will now appear in your SOAP notes.

Number Button

This type of button is used when you have a test or equipment setting you that want to record with a number.



In this example we are going to use the custom number button to record the setting on our Ultrasound unit.

Two number signs will bookend a tag used to signify that you want a number added. A tag is simply a word used to keep track of what it is you are entering; it will not show up on the report.

If you entered your number button correctly you should now see it is available in the custom Soap screen during your SOAP.

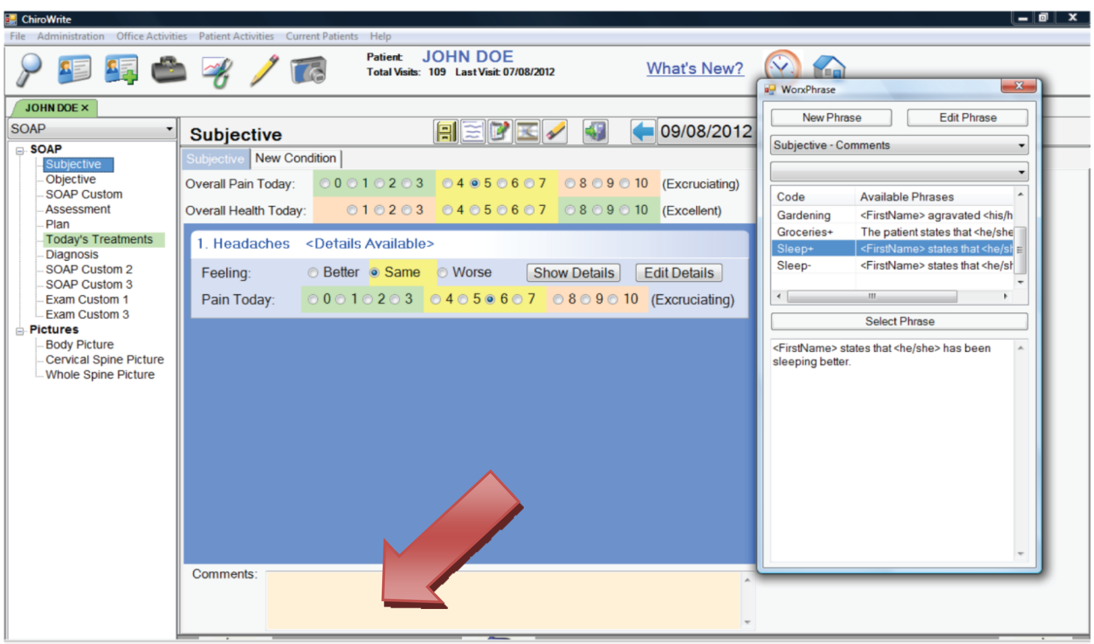
Selecting your custom number button should produce a screen similar to the one to the right with the keypad.

Enter a number and click **Finished**. The number has now been entered into the sentence you created for the button and entered into your notes.

WorxPhrases

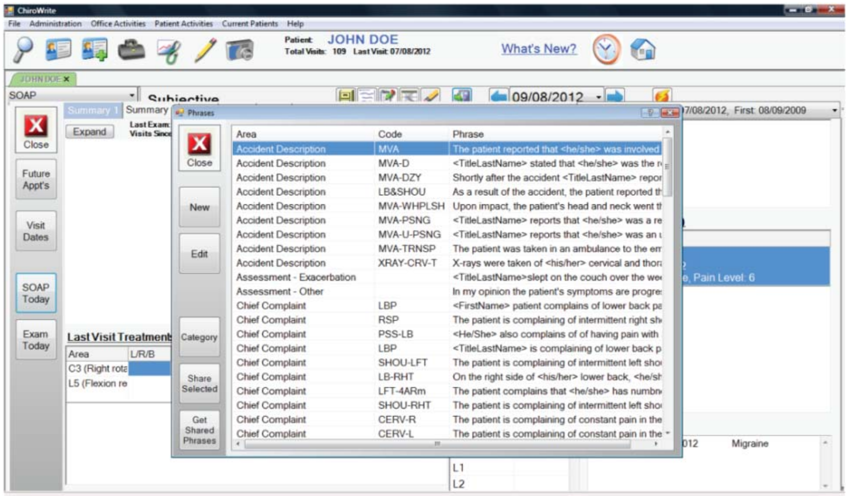
Worx Phrase allows you store commonly used sentences and paragraphs for use in your notes. This feature greatly reduces the amount of typing that you need to do. The WorxPhrase can also personalize your notes by adding patient names, info, etc into previously stored sentences.

Most screens in CW contain a peach coloured field that is used for adding notes (see **Comments** in the screen shot below). When you double click on the blank box you will get a small screen titled *WorxPhrase*. Select a phrase from the list to add to your notes. You can also add and edit phrases in the *WorxPhrase* screen.

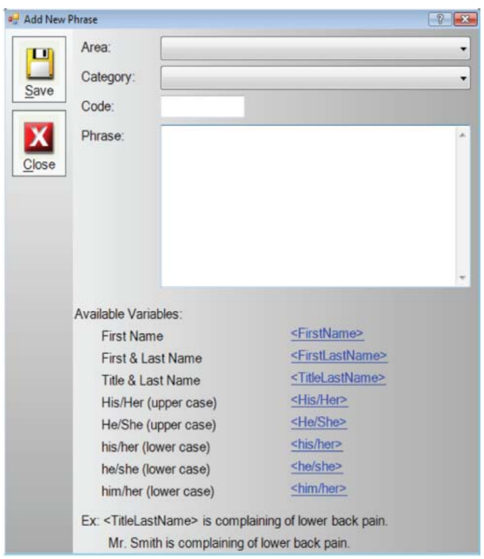


Creating Personalized WorxPhrases

Locate and click the **Administration** menu in the top left. Choose **WorxPhrase** follow by **New**.



You are now in the *Add New Phrase* screen where you can customize your phrases.



Area: This indicates where you will be placing the WorxPhrase within CW.

Category: This allows you to create alternate categories for phrases in the same Area (This feature can be edited with the category button in the phrases screen).

Code: Short form for quick reference when selecting phrases (e.g. MVA).

Phrase: This is where you fill in the sentences that make up your phrases.

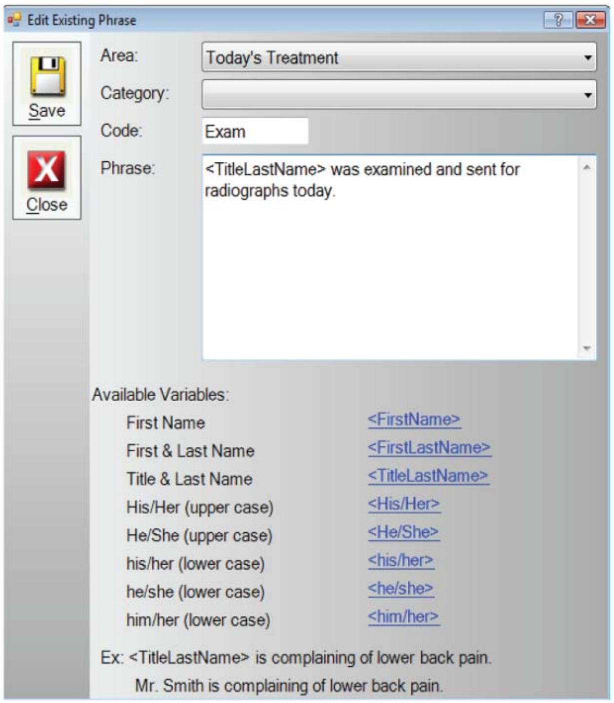
Available Variables: These options allow you to add specific patient information to your phrases.

WorxPhrases should be typed in complete sentences and not short hand.

WorxPhrase Example: Using Available Variables

Click in the phrase field; make sure that you see your cursor blinking. Now select one of the options presented under **Available Variables.** Our example uses <TitleLastName> which is unique to each patient.

Our phrase is now <TitleLastName> was examined and sent for radiographs today. When this Worx Phrase is added to your notes it will appear as Mr. Palmer was examined and sent for radiographs today.



Select **Save** and close.

You will now be able to choose your WorxPhrase by double clicking on the blank boxes provided in the SOAP and exam notes. Note that each box correlates with the Area that you set up when you created your phrase.

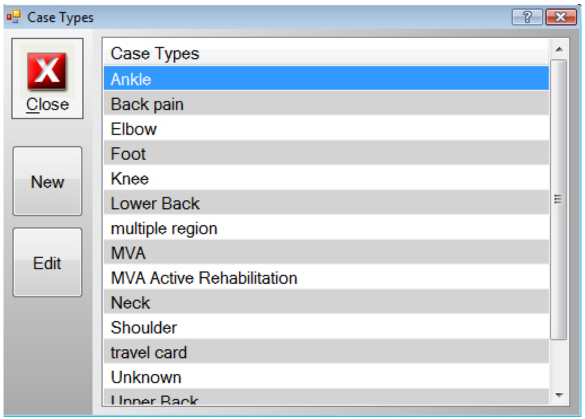
Administration Menu

Case Types

This is where you add a favourite picture from your old travel card to ChiroWrite.

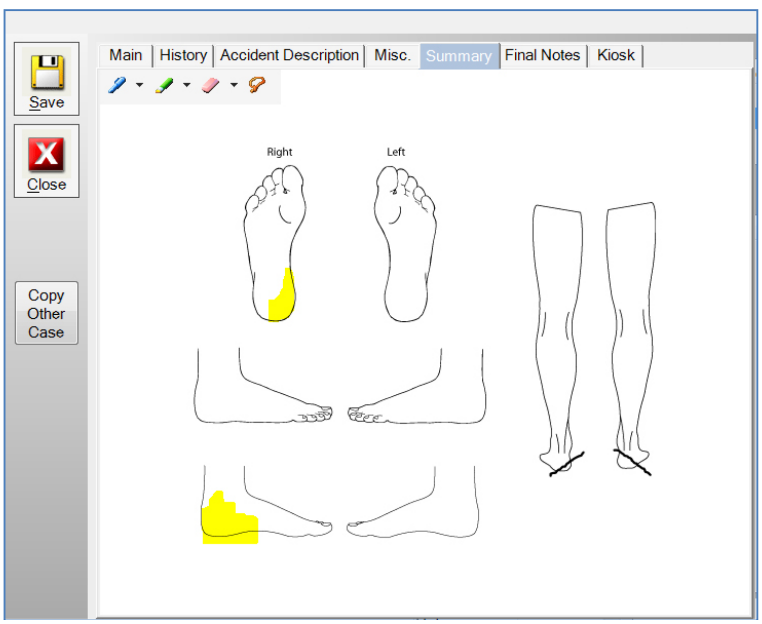
When you are entering a new case or editing an old one you will be given the opportunity to classify the type of case e.g. lower back. The administration menu allows you to set up your own case types and link them to a picture that presents in the summary screen. Furthermore you can draw on this picture while editing the case summary screen.

Click the **Administration** menu, **Case Types**.



To add a new case type, enter your description and select a picture from your computer's hard drive.

The picture can be scanned from your old travel card or you can find several websites that offer anatomical drawings for purchase. BMP, JPG, TIF, and GIF are the file formats supported.

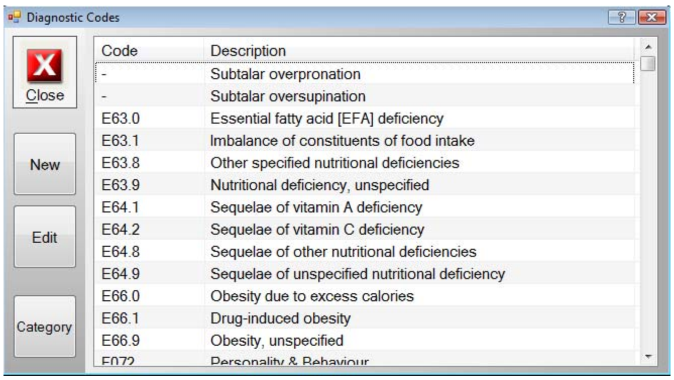


Diagnostic Codes

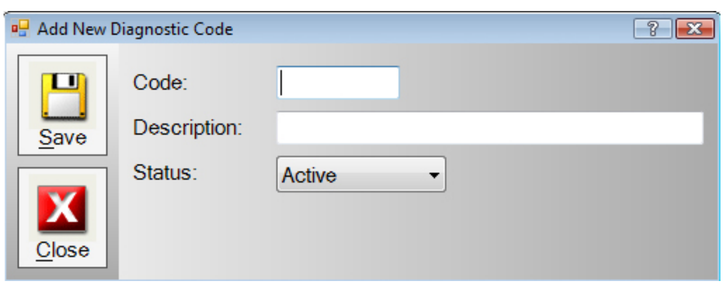
This is where you will store all the diagnoses that you will need to complete your exams and SOAPS. The default diagnostic codes contain ICD (International Classification of Diseases) codes. The ICD-10 system was developed by the World Health Organization (WHO) as a way of standardizing the diagnosis and classification of health problems across the spectrum of health care practitioners. Adding new diagnostic codes is quite simple.

Adding New Diagnostic Codes

Click the **Administration** menu, **Diagnostic Codes**.



In the *Diagnostic Codes* screen select **New**. The *Add New Diagnostic Code* screen will present you with a field for the code and another for the description. You can add your own diagnosis or use the ICD-10 codes. **Don't forget to save your changes**. If you make a mistake you can go back to the Diagnostic codes screen and select **Edit** to make changes.

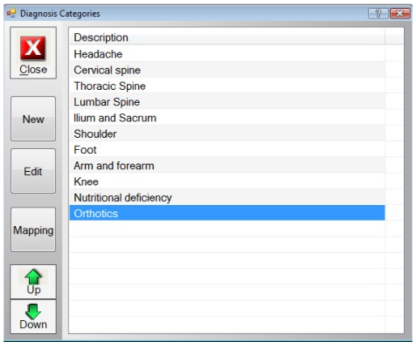


If you need an ICD-10 code that is not in the default list, you can add your own. Go to the WHO online (copy and paste this address into your web browser) http://apps.who.int/classifications/icd10/browse/2010/en. Use the search bar to find the diagnosis.

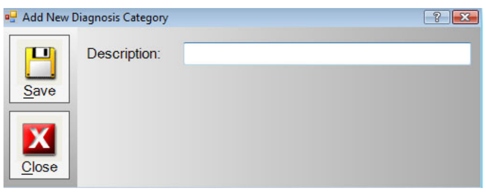
Categories

When in the Diagnosis section during a SOAP or Exam, it is a good idea to categorize your diagnosis by region or system. This can be accomplished by clicking the **Administration** menu, **Diagnostic Codes, Category**.

Select **New** to add a new category.

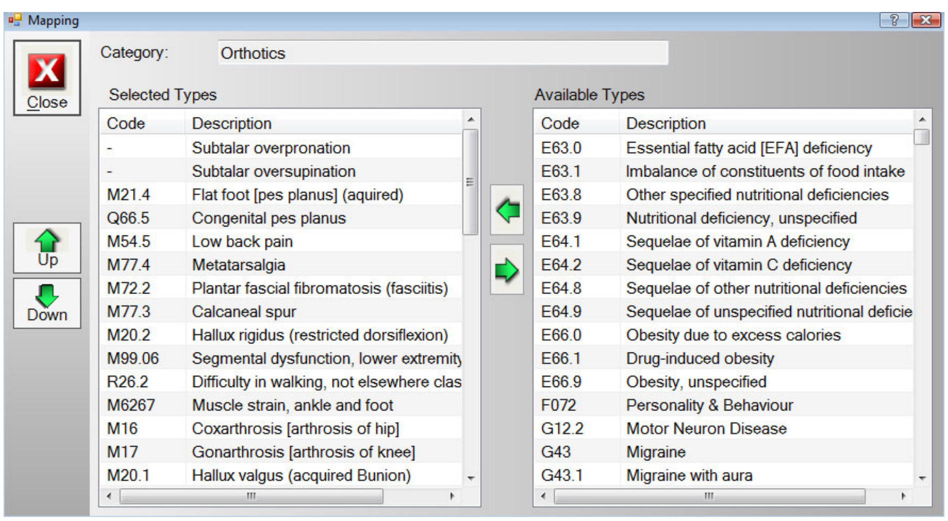


Type the name of your category in the description field and **Save**.



Add Diagnoses to your New Category

Select **Mapping** from the *Diagnostic Categories* screen. Use the horizontal green arrows to add or subtract a diagnosis from your category. Close the screen when you are finished; saving will occur automatically.

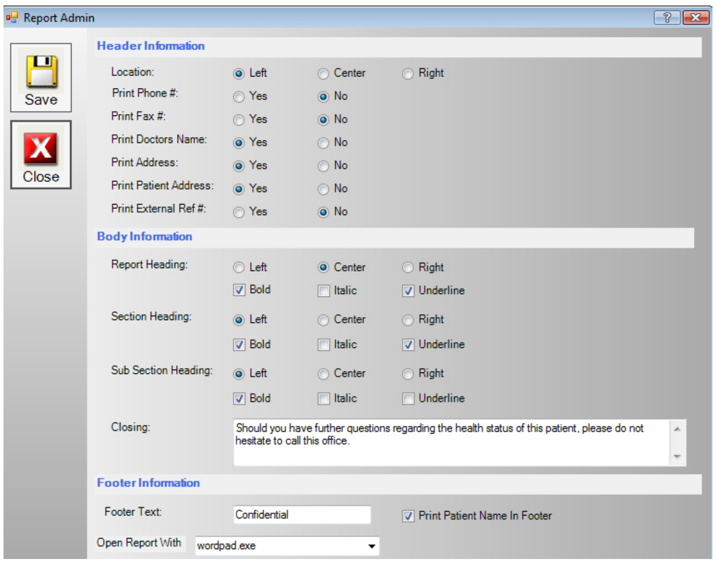


Letterhead

Formatting Letterhead

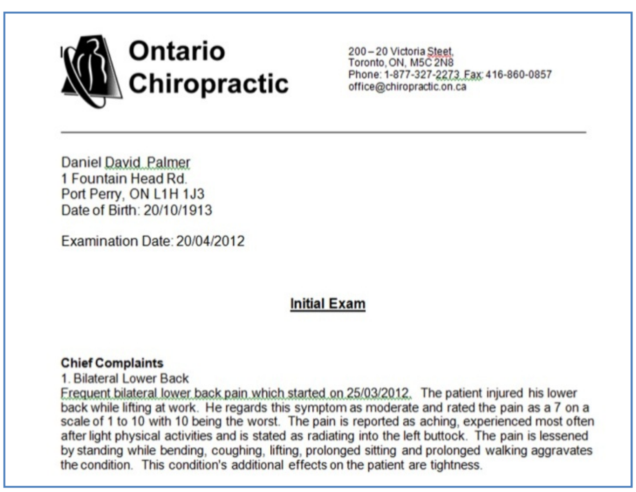
If you would like to change formatting and/or remove information in your reports there are several options available.

Go to the **Administration** menu, **Reports, Reports Admin**.



Adding a Logo

The default letterhead in ChiroWrite includes the chiropractors name and address. This is a nice feature however many of you will want to include your office logo, email address, etc.



Ontario Chiropractic

200 – 20 Victoria Steet,
Toronto, ON, M5C 2N8
Phone: 1-877-327-2273 Fax: 416-860-0857
office@chiropractic.on.ca

Daniel David Palmer
1 Fountain Head Rd.
Port Perry, ON L1H 1J3
Date of Birth: 20/10/1913

Examination Date: 20/04/2012

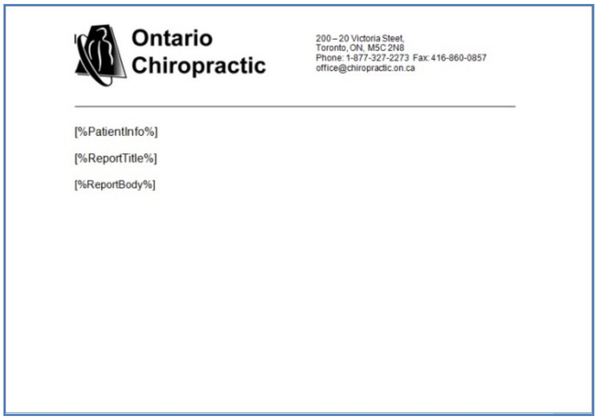
Initial Exam

Chief Complaints
1. Bilateral Lower Back
Frequent bilateral lower back pain which started on 25/03/2012. The patient injured his lower back while lifting at work. He regards this symptom as moderate and rated the pain as a 7 on a scale of 1 to 10 with 10 being the worst. The pain is reported as aching, experienced most often after light physical activities and is stated as radiating into the left buttock. The pain is lessened by standing while bending, coughing, lifting, prolonged sitting and prolonged walking aggravates the condition. This condition's additional effects on the patient are tightness.

You should be aware that ChiroWrite uses templates when printing out reports. These templates are located on the hard drive of your computer. Locate the Softworx Solutions folder where ChiroWrite was installed.

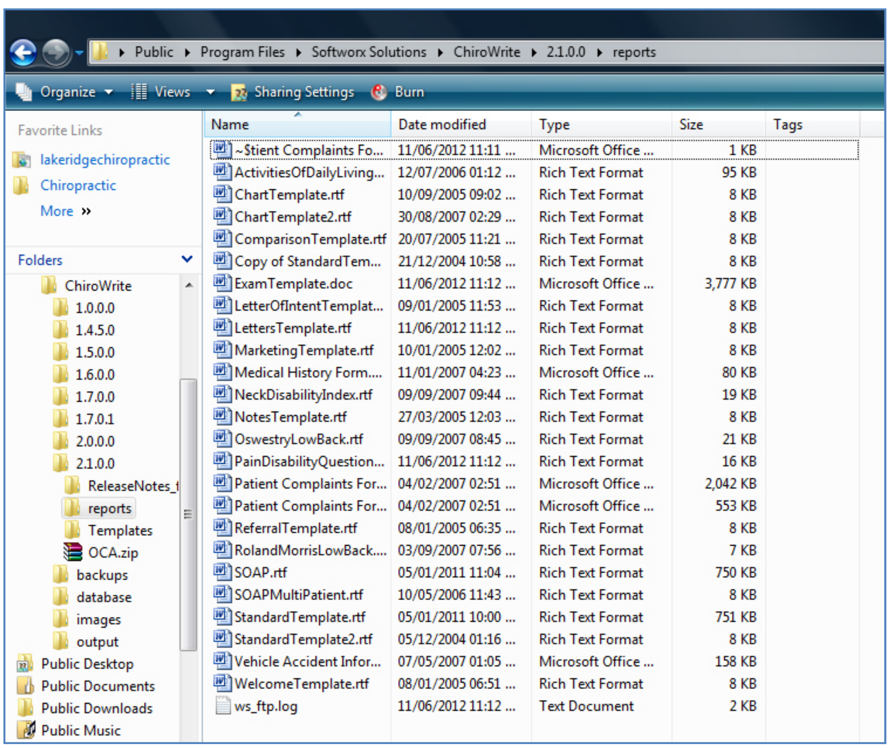
You can also download this letterhead template from the OCA website: www.chiropractic.on.ca/ProductsAndServices/Chirowrite/Resources.

Open the file named “LetterheadTemplate.rtf” in your word processing program and you should see the template below.



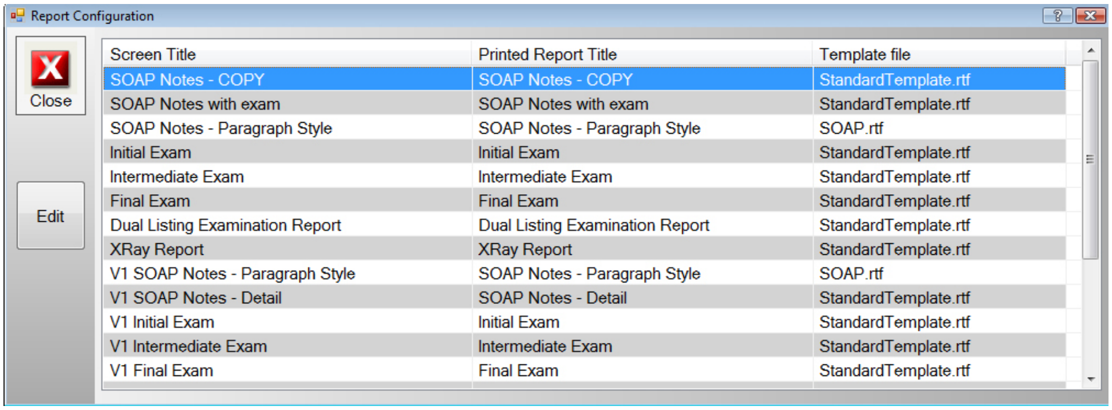
The logo and address are contained in a table. Delete the OCA logo and insert your own image (you can scan this from your business card if you don’t have a digital copy). The address is simple text that you can replace with your own clinic. Remember that a simple black and white letterhead will be easiest to read.

Place the letterhead file in your ChiroWrite directory. Save the letterhead template in the reports folder - **Softworx Solutions, ChiroWrite, 2.1.0.0** (or the most recent version), **reports. Note**: The extension of the file must be **.rtf**.

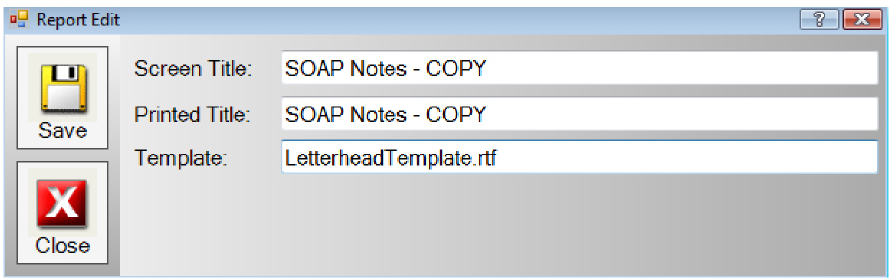


The final step is to identify which reports you want ChiroWrite to use your new letterhead with during printing.

Go to the **Administration** menu, **Reports, Report Configuration**.



Select the "**SOAP Notes – Copy**" report to add your letterhead (blue highlight). Click **Edit.**



In the *Report Edit* screen replace the text in the Template field with "**LetterheadTemplate.rtf**"

Click **Save**. Your new letterhead will now appear on SOAP Notes reports.

Repeat this process for other reports that you want your letterhead to be displayed on.

Spinal Listings

Initial Setup

ChiroWrite offers a versatile setup for spinal listings. This is probably one of the first areas you will want to customize before using ChiroWrite. Listings are used frequently in the *Subluxation* and *Today's Treatment* screens during exams and SOAPs.

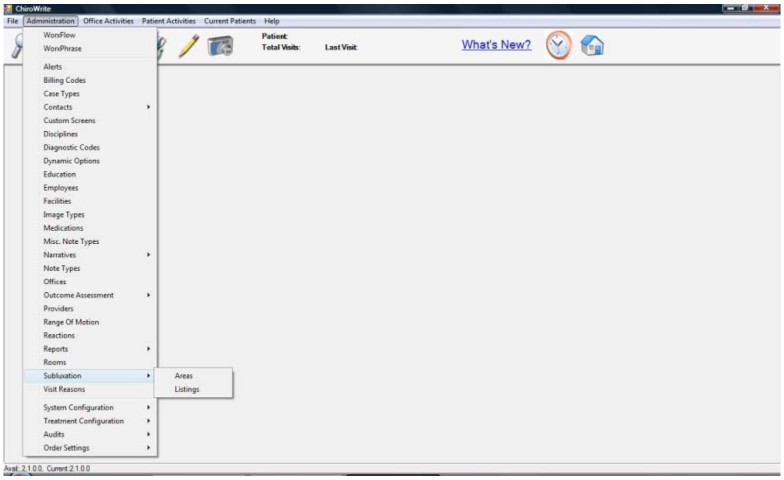
Subluxation or Joint Dysfunction

Your reports can display the title "Subluxation" or "Joint Dysfunction" when printing your spinal listings for SOAPs and Exams. Subluxation is the default term. Change this to Joint Dysfunction by selecting the **Administration** menu, **System Configuration, Defaults, Global 3**.

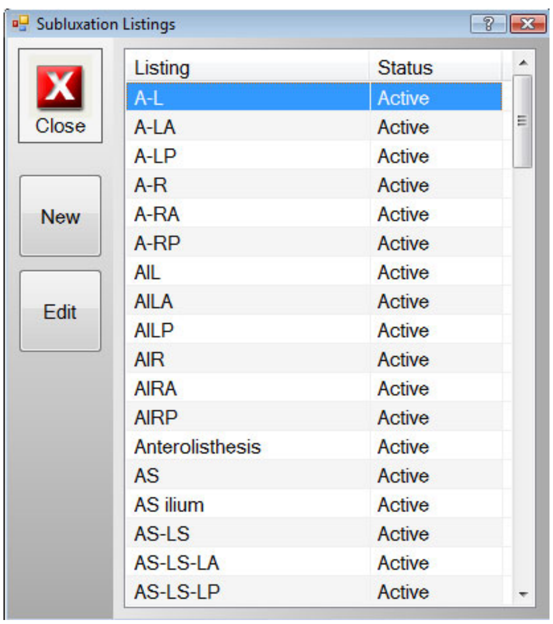
Check the box *Use the term Joint Dysfunction instead of Subluxation* and **Save.**

Creating and Editing Spinal Listings

Click the **Administration** menu, **Subluxation, Listings**.



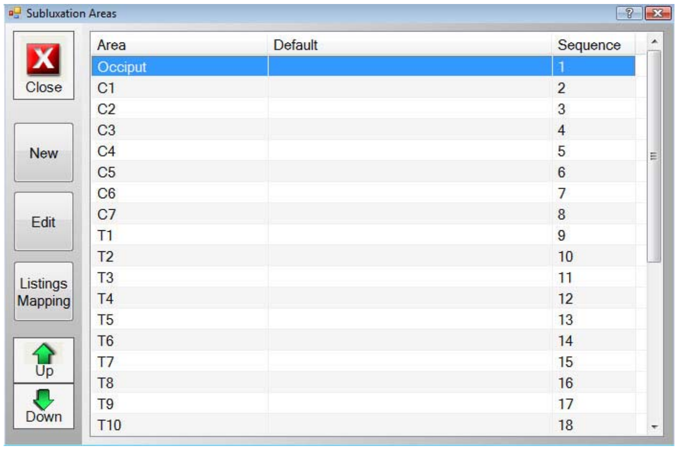
The subluxation Listings screen allows you to customize your listings to suit your practice style. The listing function can also be used to indicate muscles for massage and acupuncture points, etc. Default listings can also be edited.



Type the name of your listing into the *Listing* field and **Save**.

Once you have named all your listings you can group them according to areas. You can be specific (C2) or more general (cervical spine).

Select the Administration menu, Subluxation, Areas.



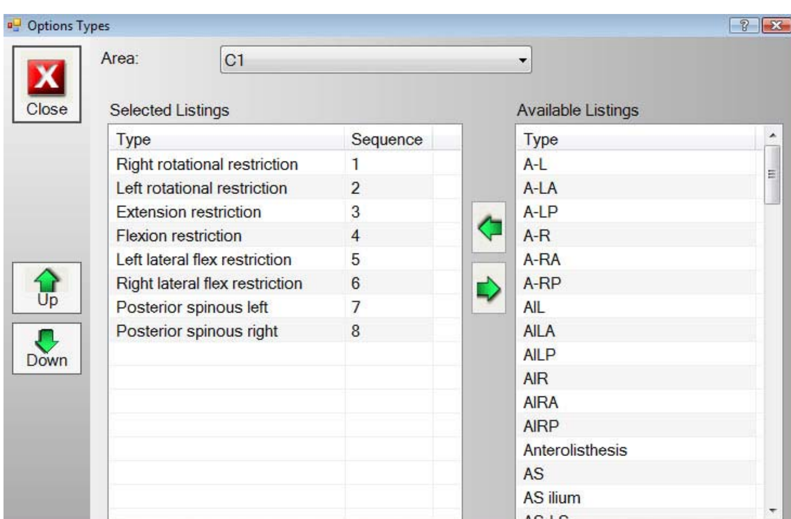
Add new areas by clicking the **New** button and entering the name of the new area in the *Area* field. Select **Active** in the *Status* field.

If you have a veterinary practice you can add extra vertebrae for your patients.

Mapping your Areas

Once you have your areas setup you will need to add listings to them. This makes a drop down list available to you when you are in the exam and SOAP screens.

In the *Subluxation Areas* screen click the **Listings Mapping** button. Add or subtract listings using the green horizontal arrows. Click **Close** when finished.



The Chiropractic Workflow

ChiroWrite was created with the chiropractic office in mind. Many of the features are intuitive and mirror the familiar paper travel card/file. However, the ways in which you will use CW in the office are distinctly different from the paper file. This section is intended to highlight how a chiropractor can make the most of the CW software. You may use it along with the December 12, 2012 webinar as a guide.

New Patient Intake Forms

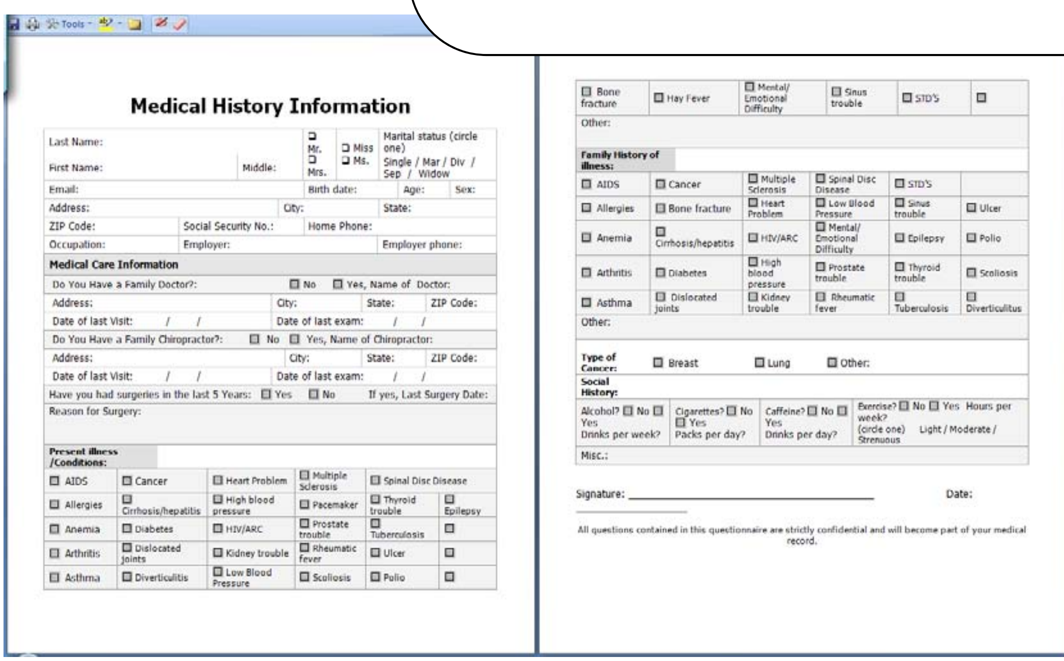
If you are tech savvy it is possible to create an intake form that can be downloaded and printed, or even e-mailed to your office. The point is to try and have the patient fill out the information before they get to your office, thereby saving you time.

New Patient

Intake forms

You will want to create an intake form that will mirror the information gathered by ChiroWrite. A generic form is provided in CW under Office Activities > Reports > Medical History Form.

Either the chiropractor or staff will need to enter this information into PMP and CW before the initial visit.



Medical History Information

Last Name:
First Name: Middle: ☐ Mr. ☐ Mrs. ☐ Miss ☐ Ms. Marital status (circle one) Single / Mar / Div / Sep / Widow
Email: Birth date: Age: Sex:
Address: City: State:
ZIP Code: Social Security No.: Home Phone:
Occupation: Employer: Employer phone:

Medical Care Information

Do You Have a Family Doctor?: ☐ No ☐ Yes, Name of Doctor:
Address: City: State: ZIP Code:
Date of last Visit: / / Date of last exam: / /
Do You Have a Family Chiropractor?: ☐ No ☐ Yes, Name of Chiropractor:
Address: City: State: ZIP Code:
Date of last Visit: / / Date of last exam: / /
Have you had surgeries in the last 5 Years: ☐ Yes ☐ No If yes, Last Surgery Date:
Reason for Surgery:

Present illness /Conditions:

☐ AIDS	☐ Cancer	☐ Heart Problem	☐ Multiple Sclerosis	☐ Spinal Disc Disease	
☐ Allergies	☐ Cirrhosis/hepatitis	☐ High blood pressure	☐ Pacemaker	☐ Thyroid trouble	☐ Epilepsy
☐ Anemia	☐ Diabetes	☐ HIV/ARC	☐ Prostate trouble	☐ Tuberculosis	☐
☐ Arthritis	☐ Dislocated joints	☐ Kidney trouble	☐ Rheumatic fever	☐ Ulcer	☐
☐ Asthma	☐ Diverticulitis	☐ Low Blood Pressure	☐ Scoliosis	☐ Polio	☐

☐ Bone fracture	☐ Hay Fever	☐ Mental/ Emotional Difficulty	☐ Sinus trouble	☐ STD'S	☐

Other:

Family History of illness:

☐ AIDS	☐ Cancer	☐ Multiple Sclerosis	☐ Spinal Disc Disease	☐ STD'S	
☐ Allergies	☐ Bone fracture	☐ Heart Problem	☐ Low Blood Pressure	☐ Sinus trouble	☐ Ulcer
☐ Anemia	☐ Cirrhosis/hepatitis	☐ HIV/ARC	☐ Mental/ Emotional Difficulty	☐ Epilepsy	☐ Polio
☐ Arthritis	☐ Diabetes	☐ High blood pressure	☐ Prostate trouble	☐ Thyroid trouble	☐ Scoliosis
☐ Asthma	☐ Dislocated joints	☐ Kidney trouble	☐ Rheumatic fever	☐ Tuberculosis	☐ Diverticulitus

Other:

Type of Cancer: ☐ Breast ☐ Lung ☐ Other:

Social History:

Alcohol? ☐ No ☐ Yes Drinks per week?	Cigarettes? ☐ No ☐ Yes Packs per day?	Caffeine? ☐ No ☐ Yes Drinks per day?	Exercise? ☐ No ☐ Yes Hours per week? (circle one) Light / Moderate / Strenuous

Misc.:

Signature: ______________________ Date:

All questions contained in this questionnaire are strictly confidential and will become part of your medical record.

The Initial Exam

Search

Find your new patient: Search or Use Current Patients Menu

Your first priority will be finding a patient that your staff has entered into PMP. Alternately you can create new

PMP

Patient Information

Case Information

This is the little doctor's bag on the main menu. This is the information from the intake form.

Motor Vehicle Accidents
Insurance info for MIG

Medical Doctor
MD/DC Report

Patient History

As you review this section with your new patient you can add important information during your dialog directly into CW.

Contraindications
Employment
Supplements
Work Activity
Surgery
Social/Family Hx
Conditions

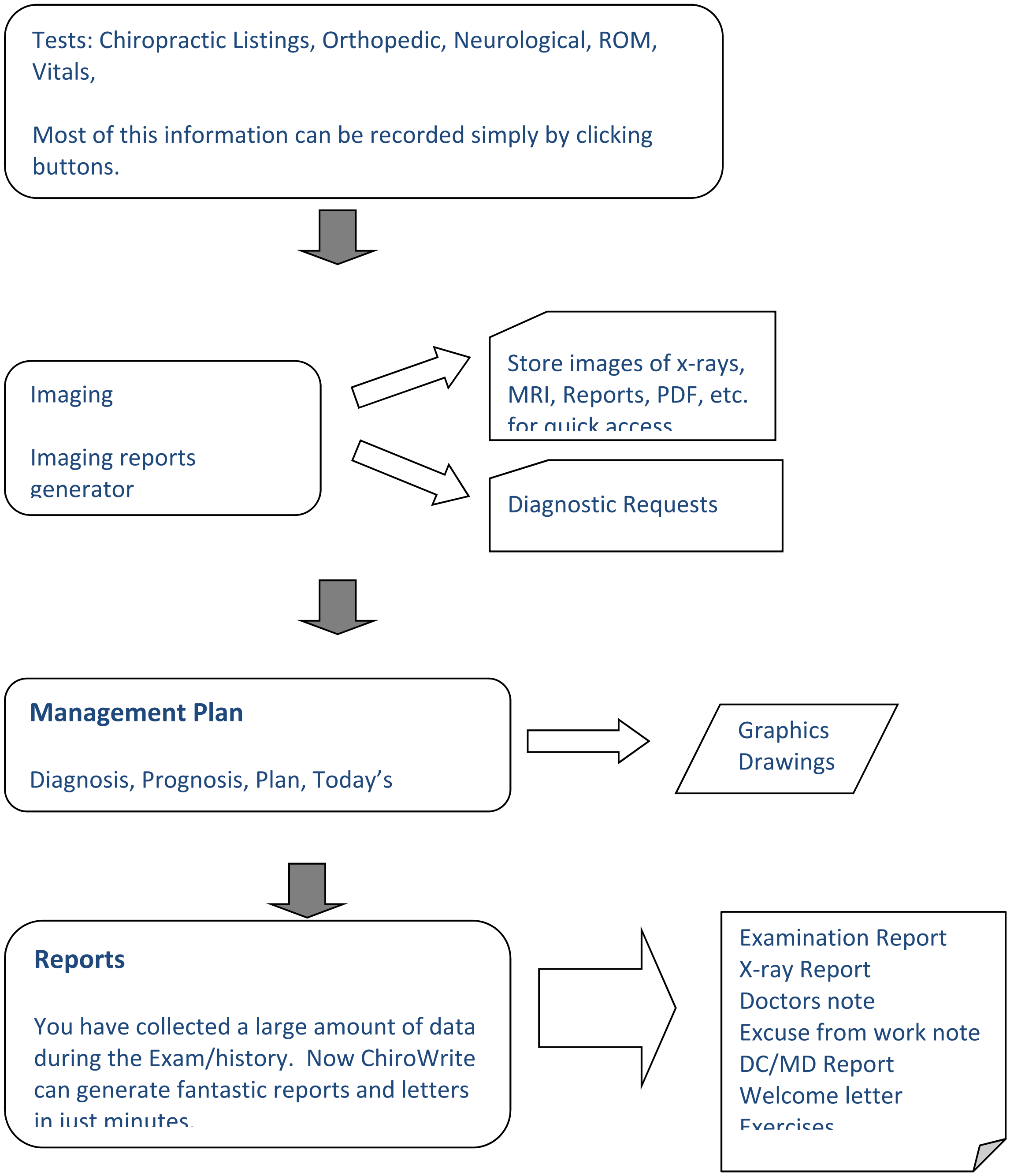
Complaints

Establish the patient's primary complaints using the touch interface and the keyboard. This same complaints section will show up later in abbreviated form on the main patient screen.

Pain Scale
Onset
Better
Worse
Quality
Radiation
Timing
Side Effects

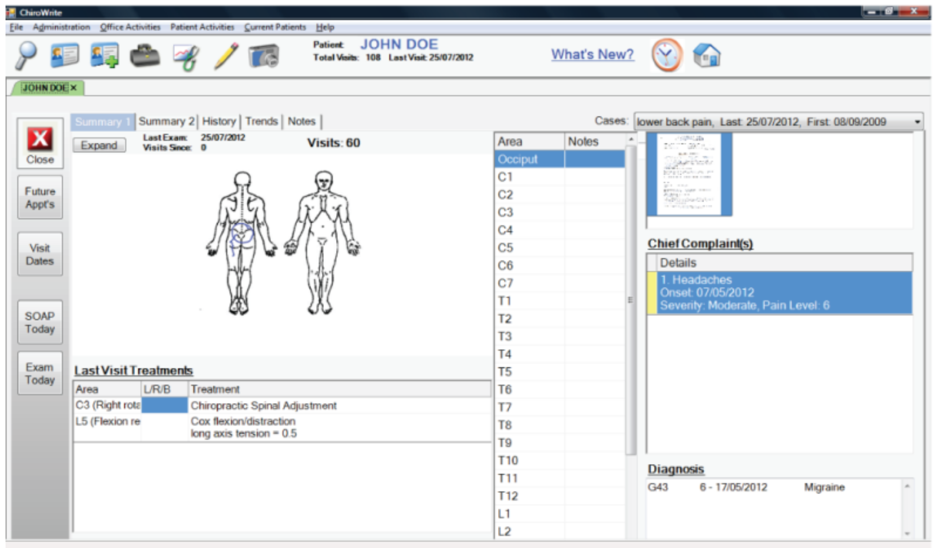
Neck Disability Index, Oswestry, Daily Living Assessment

This is information that you should include in your initial intake forms. The chiropractor or staff should enter this information before the exam. Scores are tallied automatically and recorded on the patient exam report.


Tests: Chiropractic Listings, Orthopedic, Neurological, ROM, Vitals,
Most of this information can be recorded simply by clicking buttons.
Imaging
Imaging reports generator
Store images of x-rays, MRI, Reports, PDF, etc. for quick access
Diagnostic Requests
Management Plan
Diagnosis, Prognosis, Plan, Today's
Graphics
Drawings
Reports
You have collected a large amount of data during the Exam/history. Now ChiroWrite can generate fantastic reports and letters in just minutes.
Examination Report
X-ray Report
Doctors note
Excuse from work note
DC/MD Report
Welcome letter
Exercises

SOAP

The SOAP will be setup and ready for documentation upon completion of the initial examination. The main patient screen will now act as your travel card.



Subjective

Pain scale, feeling,

Custom Buttons

Objective

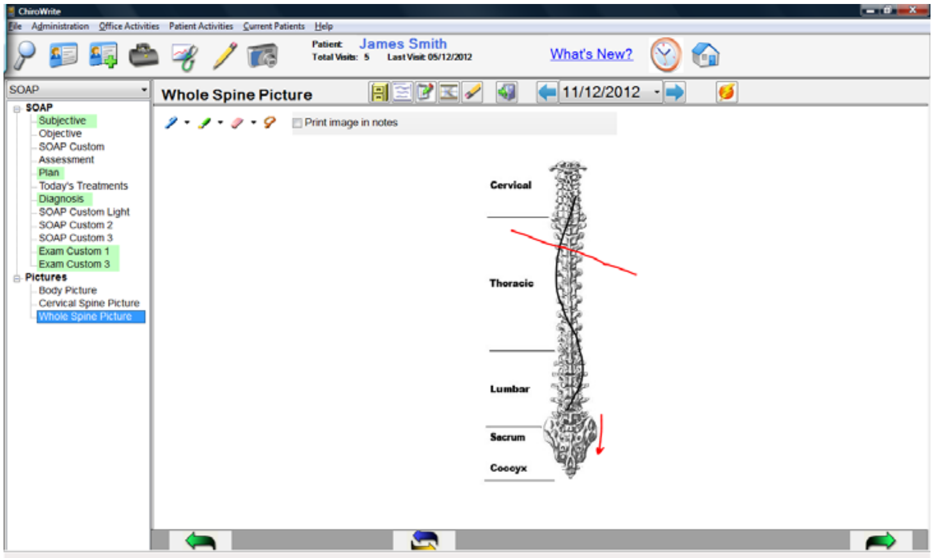
Regional testing, listings

Assessment

Better, Same, Worse
New Condition

Plan

Treatment, Goals,



Other Options

ChiroWrite is highly customizable. If your practice style does not suit the SOAP format you can alter the categories to suit other popular systems like PARTS. Additionally pictures can become part of your notes for drawing purposes to get the feel of paper notes without the paper.

Customizing your Examination Template

ChiroWrite has a specialized workflow that can be setup to mirror your examination and SOAPS. This information will guide you through the setup procedure so that you can tailor ChiroWrite to meet your practice needs.

Worxflow Template

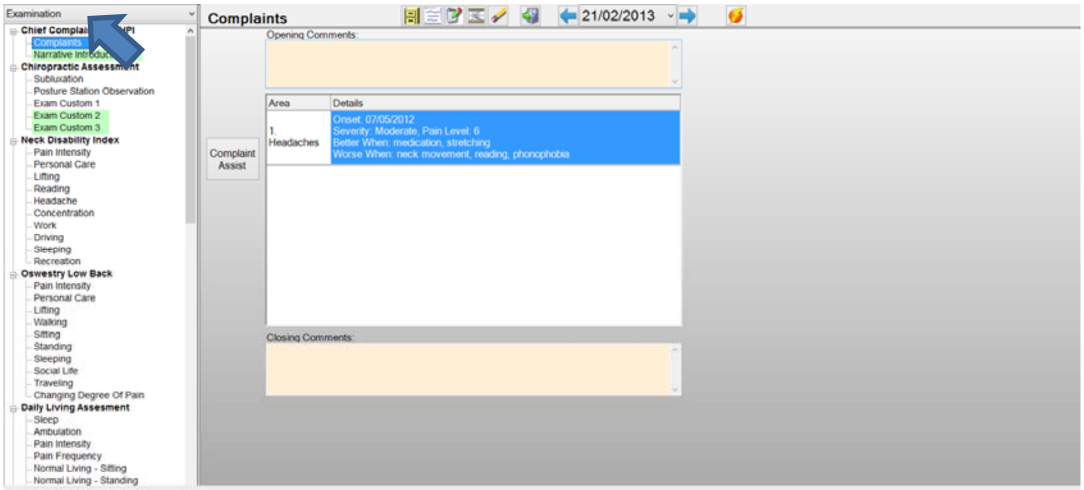
Worxflow is the term ChiroWrite uses to describe how the exam will be setup and what tests will be grouped in the different exam/soap categories.

The worxflow appears in the examination and SOAP as a vertical list on the left hand side of the screen. Titles and categories are customizable. You can add or subtract specific tests under the customized categories. This allows you to streamline your exams and eliminate extraneous tests you don't use.

Before you start designing your own custom worxflow, it is a good idea to look at the examples already used in ChiroWrite. Get a feel for the tests and make a note of what headings they can be found under. If you want to add a test that is not currently in ChiroWrite you can add it under the custom buttons section, see the ChiroWrite Customization - August 16, 2012 webinar recording at: www.chiropractic.on.ca/ProductsAndServices/ChiroWrite/ChiroWriteWebinars.aspxu.

Hint: If you find that during an exam you need to record a test not included in your worxflow, you can easily select a different worxflow and continue on with your exam. Just click the worxflow title (drop down list) and select a different worxflow.

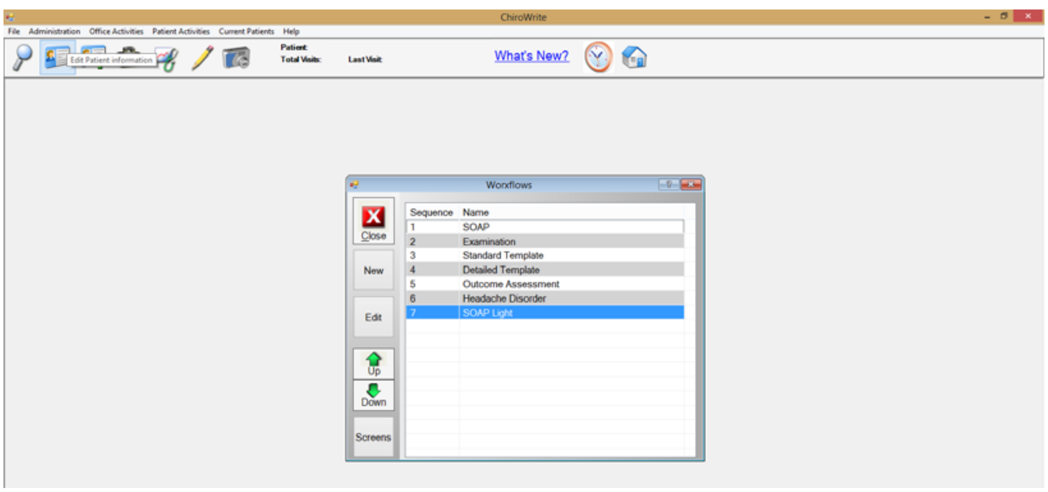
Example 1: This worxflow is titled *Examination*.



Setup

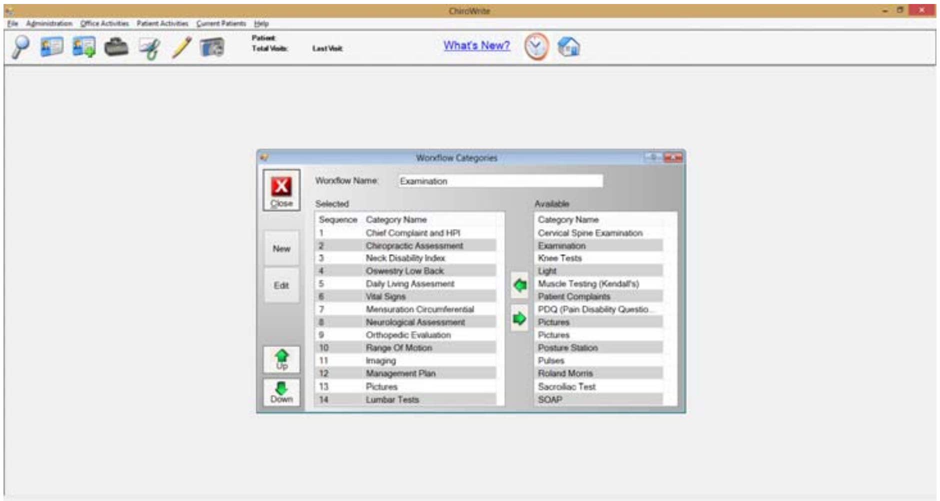
Go to the **Administration** menu and select **Worxflow**. You should get a popup that looks similar to the example below.

Example 2: Worxflows



Select an exam or *SOAP* and click the **Edit** button. A new screen should appear called *Worxflow Categories*. The worxflow name is the title of your exam/SOAP found at the top of the vertical list shown in Example 1.

Example 3: Worxflow Categories

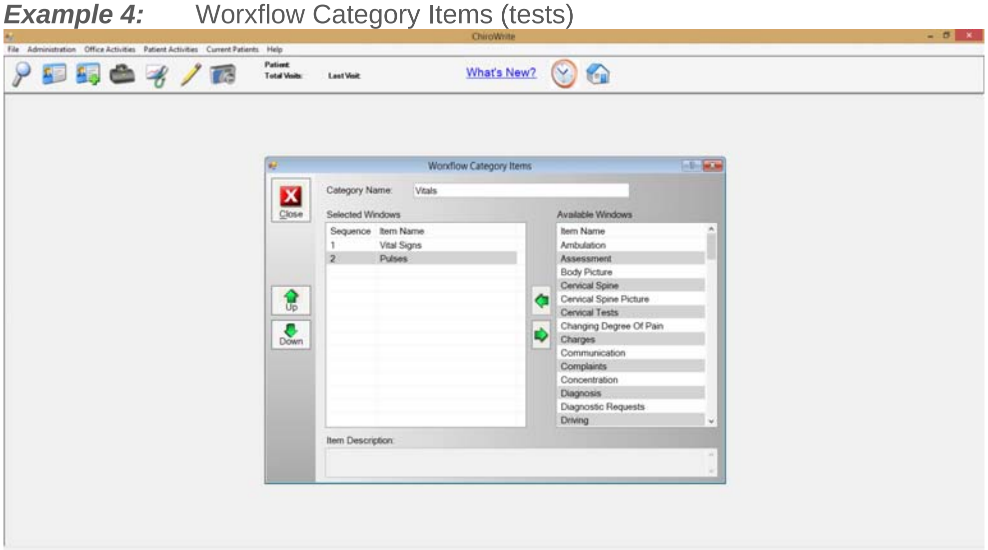


The *Selected* list on the left represents the category titles in your Worxflow. The *Available* list on the right represents the categories that are available to add to your worxflow. Use the green arrows to move categories into your worxflow. Remember that the titles of the categories need to be relevant to the tests you will be using.

Select a category and click **Edit** to change the tests listed under that category. Use the green arrows to move tests into your category. The title can also be edited in this screen. Simply delete the old title and type in a new one.

Warning: If you edit the tests in a category, the changes that you make will appear in all worxflows.

Example 4: Worxflow Category Items (tests)



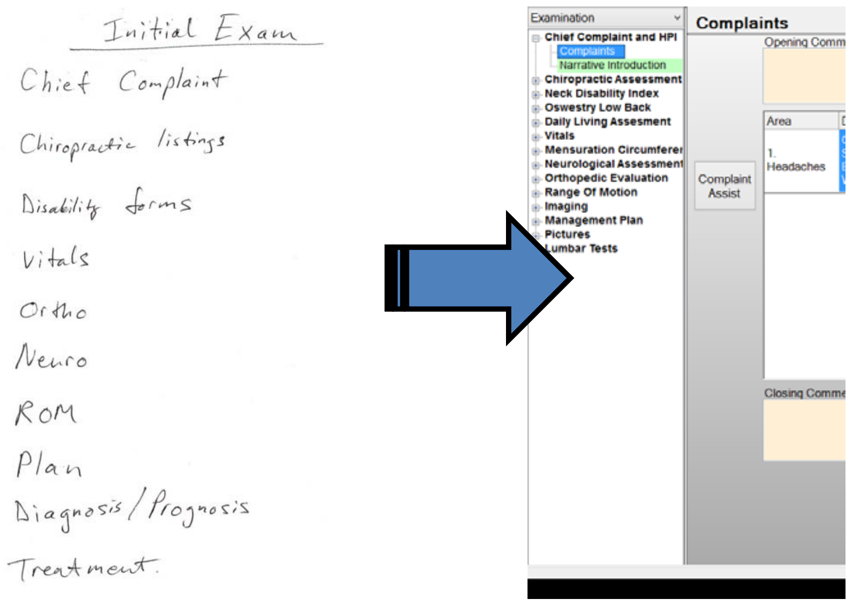
After you have arranged your categories and items (tests) you can preview your changes by running a patient exam.

Hint: There will be several instances where you will want to test the customized items in ChiroWrite. Therefore it is a good idea to create a profile for a non-existent patient (demo patient) so that you can test any changes you make before using them in the office.

Creating your Custom Worxflow

Once you are proficient at setting up the worxflow categories and items (tests) it is best to sketch out a plan. Think about the order in which you conduct your initial exam. Try not to include tests that you rarely use; remember that you can always switch to the standard worxflow if you need other tests. The object of this procedure is to streamline your exam and make you more efficient. As you compile your worxflow you might find that your exam begins to evolve. Try not to let the restrictions of paper carry over into your electronic exam.

Example 5: Paper categories list converted to worxflow



Unlike paper exams, ChiroWrite does not have limitations on space and content. Your notes can be as full and robust as you would like them. How quickly you can complete an examination is dependent on your worxflow setup. Once you are happy with your worxflow we advise that you practice with your demo patient.