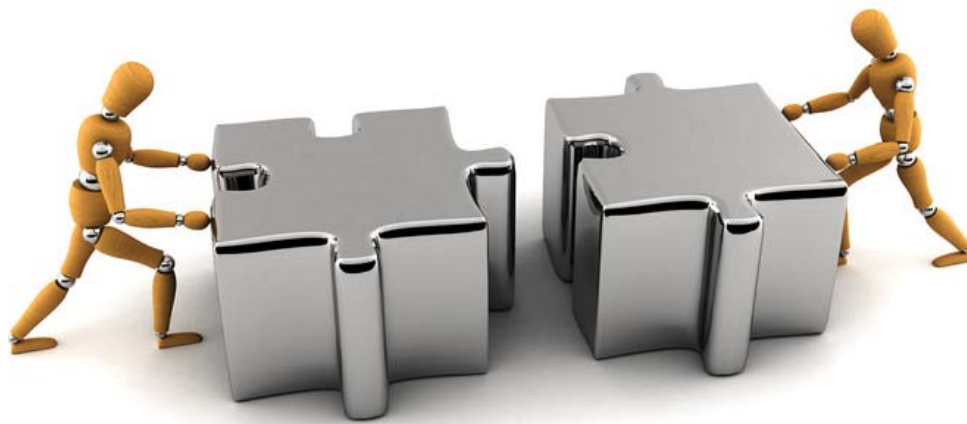


PMP & ChiroWrite Integration



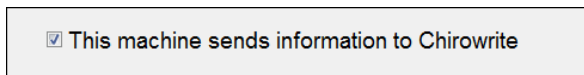
ChiroWrite and PMP have integration features that simplify procedures and reduce duplication. They can assist you when communicating with the front desk and allow you to add reminders to patient files.

PMP & ChiroWrite Communication

PMP and ChiroWrite communicate through one computer only on your network. It does not matter which computer is chosen, only that the settings are 'on' and that both programs are running.

PMP Setting

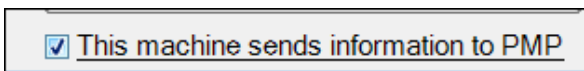
Once you have selected the computer go into PMP to the **Setup** menu, **Computer Defaults**. Place a checkmark next to **This machine sends information to ChiroWrite**.



This machine sends information to Chirowrite

ChiroWrite Setting

Next go into ChiroWrite to the **Help** menu, **Update Configuration**. Under **#3. System:** select **PMP** if it is not already visible and place a checkmark next to **This machine sends information to PMP**.



This machine sends information to PMP

Close and re-open ChiroWrite to enable this setting.

Start-up Integration

When starting up with ChiroWrite you will need to transfer:

- Patient files from PMP into ChiroWrite. There are multiple ways to complete this task
- Practitioner information is transferred automatically with the first file
- Fee Schedule

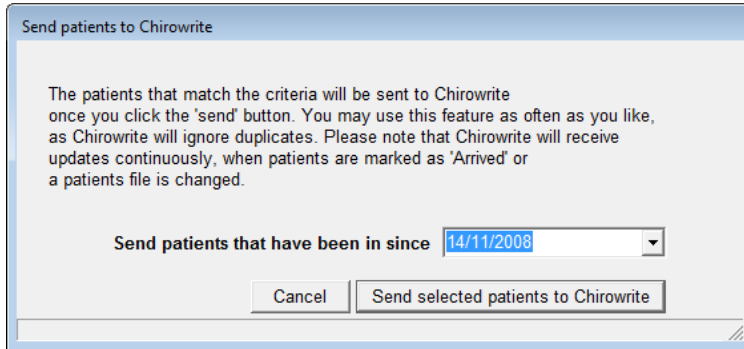
Transfer Patient Files

There are 5 ways that patient files are transferred to ChiroWrite:

- Utilize the **Group Export to ChiroWrite** function from the **Utilities** menu in PMP
- Mark a scheduled patient appointment as *Arrived* in PMP. Once an appointment status has been changed to *Arrived* the patient file and appointment will transfer and appear under the **Current Patients** menu in ChiroWrite
- Add a New Patient to PMP. The file will transfer automatically
- Update \ Edit patient information in the PMP Info 1 tab
- Select the **Send to CW button** in the patient information screen in PMP.

Export 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 on your keyboard.

1 : 30		
1 : 45	Alan Sage	
2 : 00 PM	Patricia Vanslyke	Paige Carr
2 : 15	Wendy Edwards	

- select the patient and select the *Status Arrived*

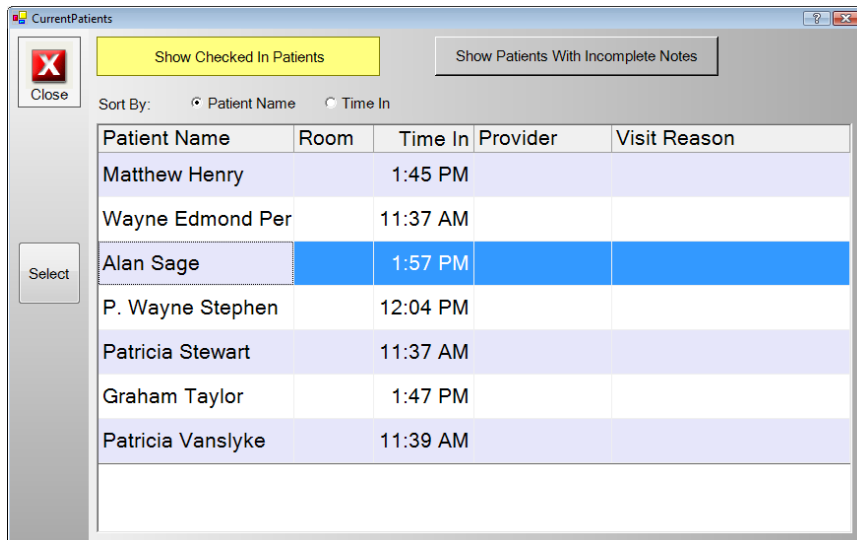
Status
<input type="radio"/> Unconfirmed
<input type="radio"/> Confirmed
<input checked="" type="radio"/> Arrived
<input type="radio"/> Done
<input type="radio"/> Rescheduled
<input type="radio"/> Postponed
<input type="radio"/> Missed
<input type="radio"/> Cancelled

The patient name on the appointment book will turn blue.

1 : 30		
1 : 45	Alan Sage	
2 : 00 PM	Patricia Vanslyke	Paige Carr

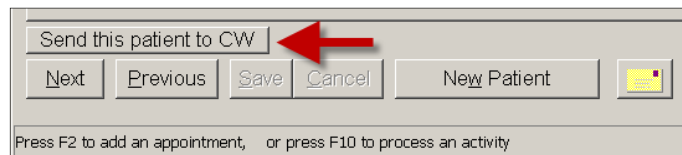
Current Patients - Accessing Arrived Patients in ChiroWrite

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



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.



Transfer Fee Schedule

You may want to transfer the PMP Fee Schedule into ChiroWrite so that charges can be added during your SOAP notes. These charges, when applied, will transfer back to PMP and appear on the Activity Posting screen.

Transfer the Fee Schedule under the **Utilities** menu, **Patient Export to CW, Run Report by Clinic**. Click **Send Fee Schedule** followed by **OK**.

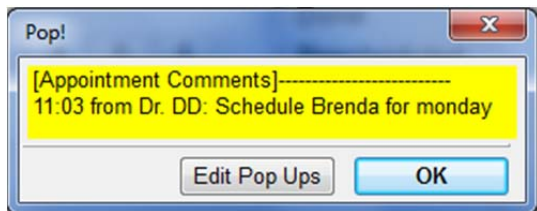
Additional Integration Options

Pop Up Alerts on PMP Posting

The Alerts feature in ChiroWrite allows you to create a popup that will appear in PMP for today's appointment only. This feature is useful for communicating with team members regarding scheduling or billing for today.

The Alert will appear in PMP once the patient has been selected from the scheduler for posting activity.

Alerts appear in PMP in the format shown below.



Create PMP Alerts

To create these alerts go to the **Administration** menu, **Alerts, New**.

Add New Alert Type

Description: Book Appointment

Type: Scheduled Alert Instant Message

Occurs: [Dropdown]

Count: [Input] Specific Visits: [Input]

Show When: Patient Selected Visit Started

Message: Book an appointment for <FirstName> for

Status: Active Send Instant to PMP

Available Variables:

First Name	<FirstName>
First & Last Name	<FirstLastName>
Title & Last Name	<TitleLastName>
His/Her (upper case)	<His/Her>
He/She (upper case)	<He/She>
his/her (lower case)	<his/her>
he/she (lower case)	<he/she>
him/her (lower case)	<him/her>

Type a *Description* for your Alert and choose **Instant Message**.

Type a *Message*. You may want to leave part of the message generic so that you can populate with required information as you select it for use with a patient. You can also make a few different alerts to communicate required information to front desk staff for different situations.

Checkmark *Send Instant to PMP*.

Click **Save** and **Close**.

Close and reopen ChiroWrite to enable this setting.

Using PMP Alerts

Once you have selected a patient from the **Current Patients** list in ChiroWrite click on the **Patients Alerts** icon on the top toolbar. Click **New**.



Add New Patient Alert

Schedule Alert Send Message Now

Save Type: Book Appointment

Close Send To: Lauren James
Liz Pridham
Softworx Solutions

Message: Book an appointment for Amy for Mon & Wed

Status: Active Provider: Daniel David Palmer, DC

Select **Send Message Now**.

Click the drop down arrow next to *Type* and select the alert from the list.

Choose which user or computer to send the alert to.

Update or add to the *Message* section if necessary.

Choose the *Provider* from the list.

Save and Close.

In PMP the Alert will appear on the *Edit Appointment Information* screen after clicking on the appointment from the scheduler.

10:15	
10:30	Amy Love
10:45	

Edit Appointment Information - Daniel David Palmer, DC #1234

Patient Name: Brenda Lloyd

Type of Appointment: Adjustment Location: Main Clinic

Comment: Status: Unconfirmed Confirmed Arrived

Date / Time: 07-May-2013, 11:00 AM

Units: 1 Vertical

Pop! [Appointment Comments] 11:03 from Dr. DD. Schedule Brenda for monday

Copy Appt. Sent Email

Add App.(F2) Patient Info (F6) Activity (F10) Finish

Date	Time	Dr.	Status	App. Type
27-May-2013	11:00 am	DD	Confirmed	Progress Exam
17-May-2013	11:00 am	DD	Confirmed	Progress Exam
15-May-2013	11:00 am	DD	Confirmed	Adjustment
13-May-2013	11:00 am	DD	Confirmed	Adjustment
07-May-2013	11:00 am	DD	Arrived	Adjustment

Press 'F10' for Activity or 'F6' for Patient Info

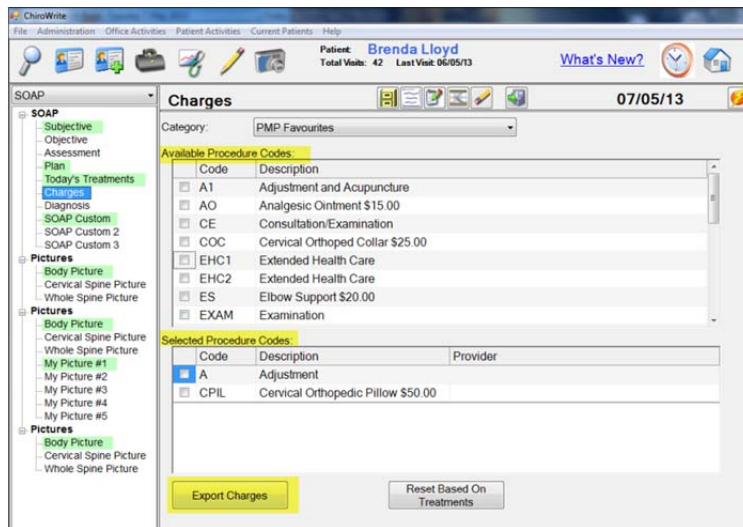
Note: PMP Alerts will only transfer to PMP when a patient is marked as *Arrived* in PMP.

Charges

Once the PMP Fee schedule has been sent to ChiroWrite you have the ability to apply charges by selecting fee schedule items in Charges located directly under Today's Treatment in the SOAP template.

The list under *Available Procedure Codes* includes your PMP Fee Schedule items from Treatment and Inventory. Treatment items do not include price as they may vary depending upon Patient Category in PMP. Inventory items include the price.

You can edit the items that are viewable in this screen by changing the Category. To edit Categories go to the administration menu, Billing Codes.

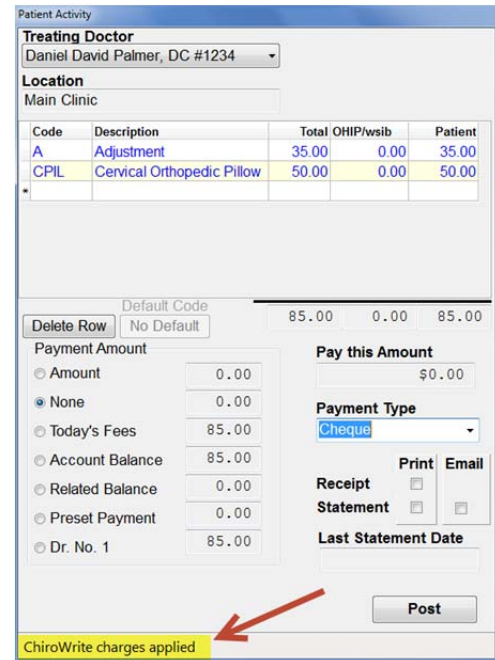


Check mark applicable items. Your selections will appear in the section below *Selected Procedure Codes*.

Choose **Export Charges**.

Once the patient has been selected in PMP for Activity Posting the screen will populate with the selected items from ChiroWrite.

ChiroWrite charges will appear in blue text rather than the regular black and *ChiroWrite charges applied* will appear on the bottom of the screen.



Next Appointments

The **Future Appt's** button located in the Patient Travel card will populate with the next three appointment dates and types scheduled for this patient. This information is updated every time the patient appears on the Current Patients list (after being marked *Arrived* in PMP).

