

PMP Version 8010 Download & Installation Instructions with Update Changes



This update requires validation of your PMP license renewal and is therefore only available for download through the PMP Utilities icon on your desktop. In our effort to go green and consider the environment, CD's or USB drives are available upon request only.

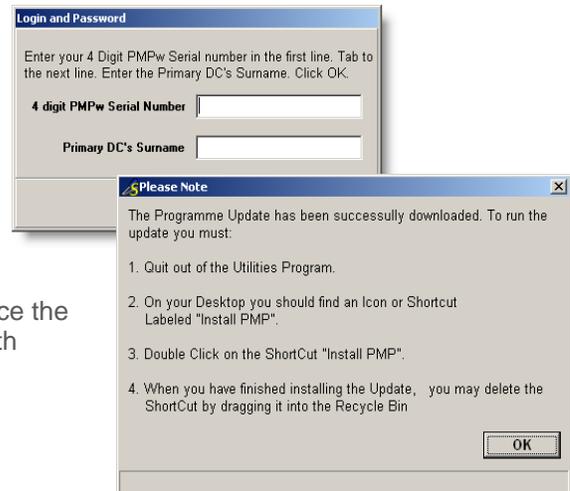
Download

Double click the **PMPs Utilities** icon on your desktop.



Click **Download Program Update**.

In the *Login and Password* screen type your **User / Serial Number**. Type the **Primary DC's Surname** and click **OK**.



You will see bars move across the bottom of the screen. Once the download is complete, you will see a *Please Note* screen with instructions. After reading, click **OK**.

Installation

Note: Close PMP and do a daily backup.

On your desktop locate and double click the icon **InstallPMP.exe** or **InstallPMP**.

Click **Next** on the *Previous Version Uninstallation* screen, **Next**, then **Finish**.

Close all remaining open windows. Enter PMP as you would normally.

Networked Offices

This update must be installed on all computers running PMP.

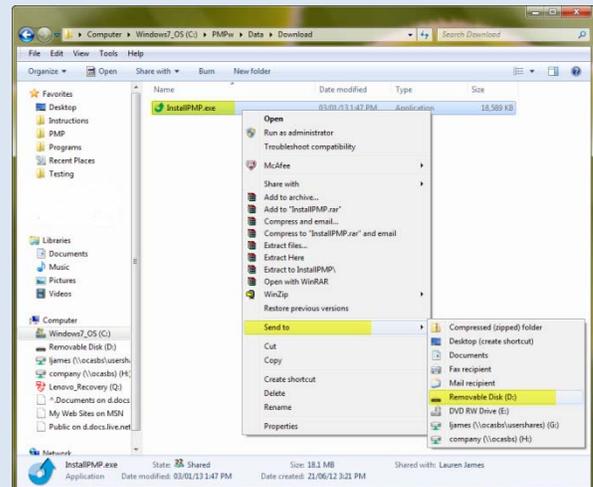
Updating Additional Computers

When PMP is running on more than one computer in your office you will need to install the update on all computers.

You have two options for updating additional computers:

- Download the update on all computers using the desktop **PMP Utilities** icon. For this option follow the instructions above on all computers running PMP
- Copy the update after downloading to a USB key and run on all computers. For this option download the update as per the previous instruction.

1. Plug a USB key into the server or main computer.
2. Click **Start, Computer** or **My Computer**. Locate and double click the **C:** drive. Double click **PMPw, Data,** and **Download**. Right click **InstallPMP.exe** and select **Send to:** from the menu. Choose your USB key from the list. When complete remove the USB key.
3. Move to another computer in your office and plug the key in. Click **Start, Computer** or **My Computer**. Locate your USB key from the list. Double click **InstallPMP.exe**. Click **Next** on the *Previous Version Uninstallation* screen, **Next**, then **Finish**. Close all remaining open windows and remove the USB.



4. Follow step 3 above on all remaining computers.

8010 Update Changes

This update contains the following features:

- Electronic Submission of Form 8 direct to WSIB
- Regulatory Changes for HCAI
- A search feature for email address



Electronic Submission of Form 8 to WSIB

PMP allows for the direct submission of WSIB Forms to the TELUS HEALTH (TH) portal. This procedure is completed without the need to access the TH portal.

Here are the benefits for using the PMP for WSIB form submission.

- Patient information transfers from the patient file to WSIB forms
- Forms are made and stored locally on your computer
- Forms are included in PMP backups
- Forms are created without access to the internet. An internet connection is required only to send completed forms.

To facilitate electronic submission of PMP's WSIB forms electronically users are required to:

- Be registered with TH and have a username and password (if you have previously registered your current username and password are valid)
- Have a WSIB Provider ID.

Setup PMP

From the **Setup** menu, go to **Doctor Defaults**. Choose the practitioner and select **Edit this Doctors Defaults**.

Click the **WSIB** tab on the left.

Type your *UserName* provided by TH.

Type in your *WSIB Provider ID*. This is either a 9 or 12 digit number. **Note:** this field may already be populated with information pulled from one of your previously completed WSIB forms.

Checkmark **Enable WSIB Electronic Form Submission**.

Click **Accept**.

Doctor Defaults for : Daniel David Palmer, DC #1234

Personal Info

Appointment Book

Patient Defaults

Statements

ChiroWrite

Activity

Receipts

WSIB

WSIB Details

UserName

Provider ID

Electronic Forms Submission

Enable WSIB Electronic Form Submission

Creating & Sending WSIB Form 8's in PMP

Accidents

The **Accidents** section lists all accidents related to this patient. Buttons in this section are:

- **New Accident** will create a new accident - details will be populated after creating a form
- **Edit Comments** allows you to add a comment to the accident
- **Delete** will delete an accident if there were no forms created using this accident

The screenshot shows the PMP software interface for patient Amy Love. The 'Accidents' section contains a table with one entry:

Accident ID	Date	Claim Number	Comments
129	1-Jul-2013	84972949	

Below the table are buttons for 'New Accident', 'Edit Comments', and 'Delete'. The 'Form Data' section contains buttons for various form types: FAF, Form 8, Treatment Ext.(0148), Physio TE(0153A), UE Init. Ass.(2864), UE Care/Out.(2865), LB Init. Ass.(3238), LB Care/Out(3239), LE Init. Ass.(2098), LE Care/Out.(2099), MTBI Init. Ass.(3240), MTBI Care/Out.(3241), Shoulder Ass.(2522), Shoulder Out(2524), and Progress Report(26). Below these buttons is a table of submitted forms:

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/Final	Invoice Number
129	112	Form8	Submitted	10003562020130822110021		22-Aug-2013	Final	1012
129	110	Form8	Submitted	10003562020130822104229		22-Aug-2013	Final	1010

At the bottom of the interface are buttons for 'Edit Comments', 'Edit', 'View / Print', 'Delete 'Draft'', 'Submit Form8 to WSIB', and 'Print Log'. There is also a search bar for patients and a footer with navigation instructions.

Form Data

All forms required by WSIB are created by clicking the appropriate button. The table below the report buttons are forms created for this patient. Below your forms are buttons that offer additional functions for your forms:

- **Edit Comment** allows you to add comments to a form
- **Edit** allows a *Draft* form to be edited
- **View / Print** will open the Ace Viewer and display your form
- **Delete 'Draft'** allows you to delete *Drafts*. **Note:** *Final* forms cannot be edited or deleted.
- **Submit Form8 to WSIB** will electronically send your Finalized form to TH
- **Print Log** offers a report detailing the status of electronically submitted Form 8's.

Completing the Form 8

Click onto the **New Accident** button if you do not have an existing accident for the patient or if your patient has had a new accident. Read the message boxes; click **Yes**, then **OK**.

Click the **Form 8** button.

WSIB Health Professional's Report (Form 8)

✓ Section A ✓ B-C1 ✓ C2 ✓ C3-C4 ✗ D1-D3 ✓ E ✓ F1-F2 ✓ F3-F4

Claim Number

Claim Number 84972949 Date of Birth 11/07/1965 Date of Accident 01/07/2013 Social Ins. No.

A. Patient Information

Last Name Initial First Name
Love C Amy

Address Language Other Language
1001 Bay St, #214 English

City Province Postal Code Telephone Number Gender
Thornhill Ontario L4K 7J8 (905) 967-1238 Female

Employer/Company Name Job Title/Occupation
Go Transit technician

Test Form Cancel Save as 'Draft' Save for WSIB submission (unalterable)

1 field needs to be corrected. (1 Error)

The form will open with the sections in tabs across the top. Click on any tab to go to the specific part of the form. Many fields will be populated with information pulled from the patient file.

Patient information fields can be edited and the changes will be reflected in the patient information field containing the original information. For example, if you change the telephone number in Section A the change will reflect on the Patient Information Info 1 tab.

The fields contained in WSIB forms will require the use of calendars, drop down selections, check boxes, and typing. The printed forms will replicate WSIB produced forms.

WSIB and TH have specific rules that must be followed when completing forms for electronic submission. These rules have been incorporated into PMP forms to avoid rejection.

Additional Buttons

The bottom portion of the form contains the following buttons:

Test Form Cancel Save as 'Draft' Save for WSIB submission (unalterable)

- **Test Form** when pressed will mark a red 'X' on the tabs signifying incomplete parts of the form and highlight required fields in yellow.
- **Cancel** closes the form without saving and brings the user back to the WSIB forms tab.
- **Save as Draft** will save all information input so far allowing you to edit or complete the form at a later time
- **Save for WSIB (unalterable)** saves the form in an unchangeable format. Use this button only when you are sure all the information is complete and correct.

Click **Test Form** to locate required areas of the form that are incomplete. Tabs where validation rules fail will be marked with a red 'X'. Fields will be highlighted in yellow. Move your mouse over yellow fields to produce a hint. Once a yellow field has been completed the colour will return to normal by clicking **Test Form** again. Check all parts of the form to make sure that pre-populated fields are correct for your patient.

If you are unable to complete the form click **Save as Draft**. The form will be saved as a Draft on the main WSIB forms tab.

Click **Edit Comments**. Type a comment about the status of the form or missing information on the form. Click **OK**. The comment will now be added to the form description.

To add additional information to a form click the draft form in the list followed by **Edit**. When the form is complete click **Save as WSIB Submission (unalterable)**.

Final and *Submitted* forms cannot be edited or deleted; we recommend printing draft forms and double checking for accuracy before finalizing.

Submitting the Form 8

Once the form has been *Finalized* the **Submit Form8 to WSIB** button will become active. Make sure that the form for submission is highlighted by selecting the line. Click **Submit Form8 to WSIB**.

Form Data

FAF | Form 8 | Treatment Ext.(0148) | Physio TE(0153A) | UE Init. Ass.(2864) | UE Care/Out.(2865) | LB Init. Ass.(3238)

LB Care/Out(3239) | LE Init. Ass.(2098) | LE Care/Out.(2099) | MTBI Init. Ass.(3240) | MTBI Care/Out.(3241)

Shoulder Ass. (2522) | Shoulder Out (2524) | Progress Report (26)

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/ Final	Invoice Number
▶ 130	111	Form8	Ready to Submit			22-Aug-2011	Final	1011

A pop up will appear requesting your password. Input the required information.

Please enter

Enter password for WSIB portal for username YTUGJNBR2

Be patient. A communication screen will appear with details from TELUS HEALTH regarding the submission. **Read the screen.**

The screen below contains confirmation the form was submitted successfully.

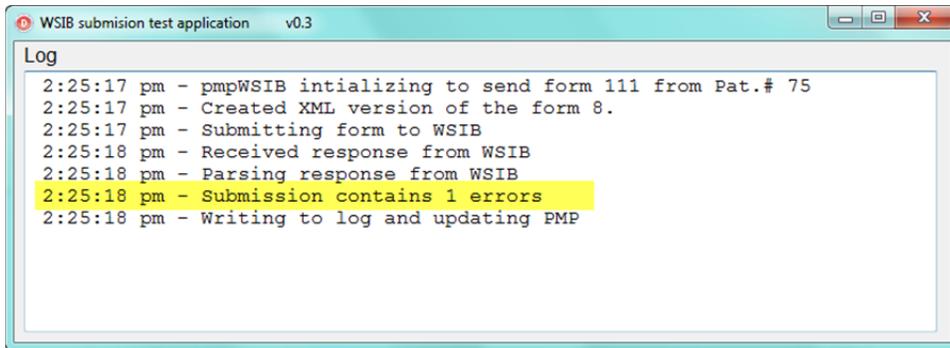
WSIB submission test application v0.3

Log

```

2:16:44 pm - pmpWSIB intializing to send form 113 from Pat.# 54
2:16:44 pm - Created XML version of the form 8.
2:16:44 pm - Submitting form to WSIB
2:17:01 pm - Received response from WSIB
2:17:01 pm - Parsing response from WSIB
2:17:01 pm - Submit successful. Received Confirmation from WSIB
10003562020130823021542
2:17:01 pm - Writing to log and updating PMP
    
```

This screen contains information that 1 error was found. The form must be corrected and resubmitted.



The WSIB submission screen will disappear after a few moments.

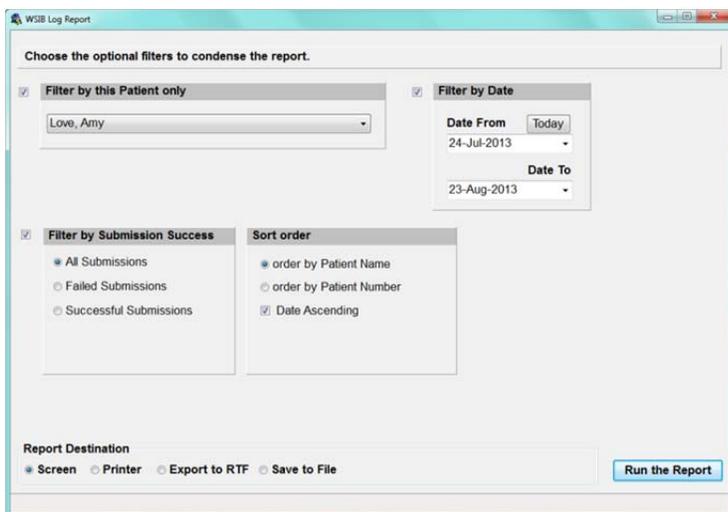
Once back on the *WSIBForms* tab your Form 8 will show either **Submitted** or **Submit Errors**.

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/Final	Invoice Number
▶ 121	109	Form8	Submitted	10003562020130823112340		23-Aug-201	Final	1009

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/Final	Invoice Number
▶ 130	111	Form8	Submit Errors			22-Aug-201	Draft	1011

Log Report

Beside the **Submit Form8 to WSIB** button you will see a **Print Log** button.



The report offers filter options to assist in locating the information required.

Note: This log is also available under the **WSIB** menu from the main appointment book.

To determine the reason for a Submit Error choose to filter the response by *Failed Submissions*.

Fri, 23 Aug 2013		WSIB Submission Log			Date From:	14-Aug-2013	Page No.	1
					Date To:	23-Aug-2013		
Filtered by Patient; Date; Failed Submissions;								
Sent	Error	Date	Time	Form ID	Pat. No.	Patient Name	WSIB Username	Confirmation
✓	✓	Aug 14, 2013	1:53:12 PM	107	18	Lloyd, Bradley	s2sBCuat1F8	203 Occupation on CLINICAL is not allowed to contain character(s) '&'. Please remove the character(s).
✓	✓	Aug 14, 2013	1:38:04 PM	106	18	Lloyd, Bradley	s2sBCuat1F8	302 The claim number 12345678 is not valid
✓	✓	Aug 14, 2013	1:19:00 PM	105	18	Lloyd, Bradley	s2sBCuat1F9	301 Login authorization failed

Read the highlighted line to determine the reason for the rejections.

Close the log and select the **Edit** button to return to the form. Correct the cause for the rejection.

Resubmit the form.



HCAI Regulated Changes

Effective November 4, 2013, Acupuncturists, Kinesiologists and Traditional Chinese Medicine Practitioners (TCMPs) will be recognized as Regulated Health Professionals in the HCAI system

These practitioners will be able to sign part 5 of the OCF 18 as of the effective date.

Facilities that include these types of practitioners must update the practitioner information in HCAI to show the new regulated professions for existing providers.

Updating a Providers Profession

Access the HCAI website from your internet browser at www.hcai.ca and login.

HCAI
Health Claims for Auto Insurance

HCAI Sign-In

www.hcaiinfo.ca for details

Welcome to the HCAI application for automotive insurance health claims.
Please enter your user name and password to sign-in.

User Name:

Password:

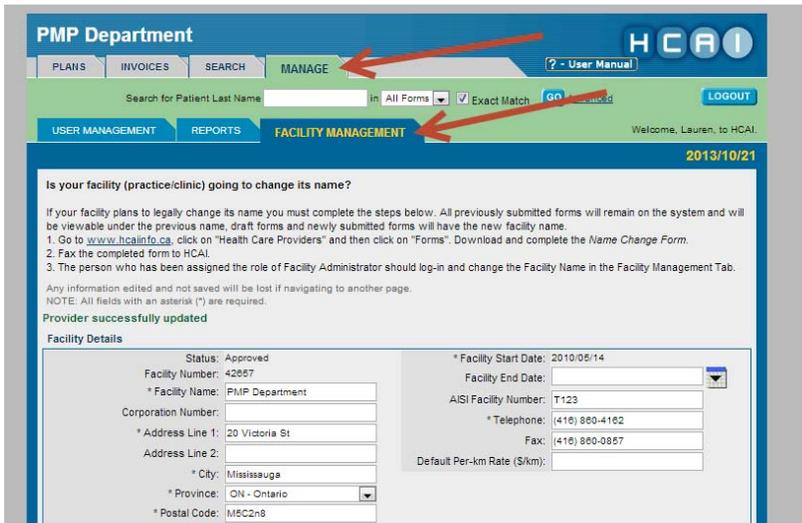
SIGN-IN

[Sign-in help](#) [Forgot your password](#)
[Register a facility](#)

Health Claims for Auto Insurance (HCAI) is an initiative of Ontario auto insurers. It was developed in consultation with a number of stakeholders in the auto insurance system, including various health care provider associations. For more information about this initiative please visit [HCAI information site](#).

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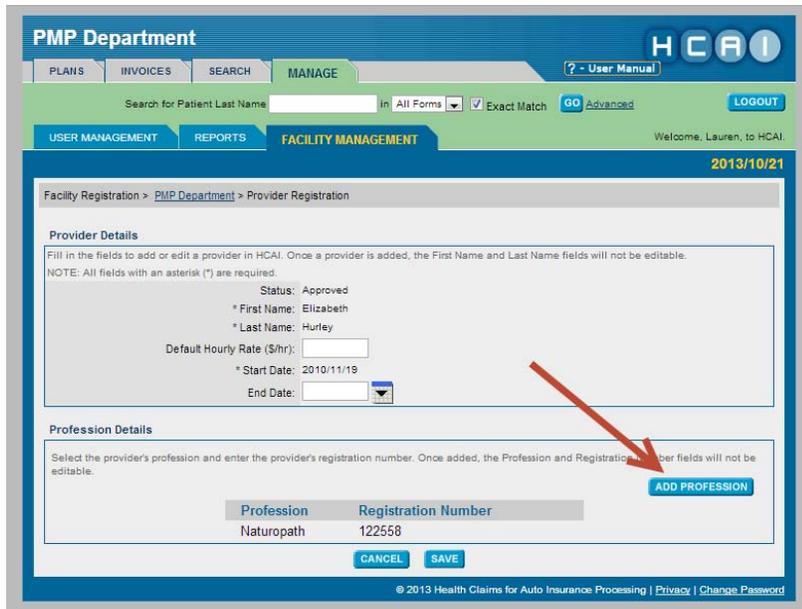
Click the **Manage** tab at the top of the screen and click **Facility Management** on the lower tabs.



Scroll to the bottom of the screen. Locate and click the provider.

Note: Practitioners who hold dual designations (e.g. a provider who is a Chiropractor and Regulated Acupuncturist) should have their name listed twice in the Provider Name list. Make sure to locate the correct provider profile from the list. Clicking the name will list the profession.

Select **ADD PROFESSION**.



Click the drop-down arrow beside *Please Select a Profession* and select the newly regulated profession from the list. Type the registration number into the applicable field.

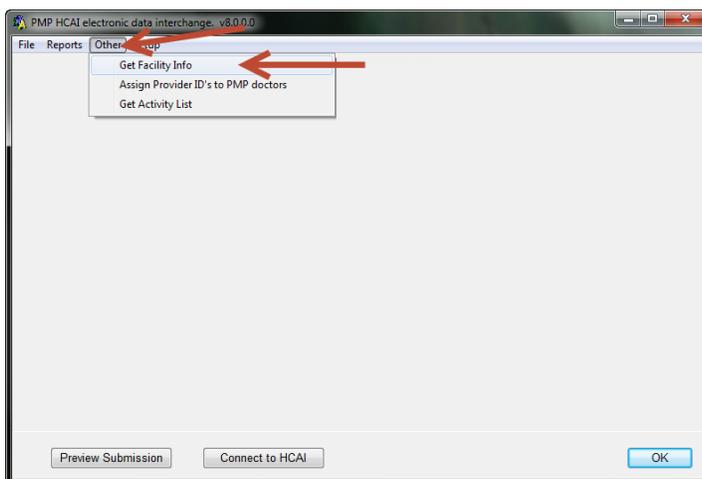
Click **Save**.

Close all windows.

On your desktop locate and open **PMPHCAI**.



Select the **Other** menu and click **Get Facility Info**. This will connect your PMP to HCAI and update your provider information in PMP. Make sure to close and reopen PMP so that your changes are reflected.





Email Search Feature

A search feature has been added that allows you to locate a patient by their email address. This is effective when an email has been rejected and you are unable to determine who the patient is by their address.

The feature is part of the **Search for Patient by options** available in the *Patient Information* screen.

Select **Other**.

Pat No. Doctor of Record
1 Daniel David Palmer, DC #1234

Preferred Location Clear

First Name Last Name
Adrienne Linton

Address
Street & Apartment or Unit #
1 Hook Avenue
City Province
Thornhill ON
Postal Code Country
L4J 5K9

Phone Numbers
Priority
Home (905) 731-0702
Work (416) 633-3000
test
Maiden Name

Patient Type
Cash
Patient Category
MVA
Payment Type
Cash
Default Code
Flags
2
Active

Referrals
Referral Method Referred By Patient
Dr. Mary Smith

Date of Birth Age Sex
06-08-1974 39 Female

Send this patient to CW

Search for a Patient by
Last name Number First name **Other**

Next Previous Save Cancel New Patient Continue

Press F2 to add an appointment, or press F10 to process an activity

Click the radio button to the left of **eMail**. Type the email, or part of the email address into the search field.

PMP will list all files containing the typed information. Double click the patient name to access their file.

Search for a Patient with various Criteria

Search by
 SIN Postal Code EHC 2 eMail
 Bill To / Employer WSIB Claim # MVA
 Phone Number EHC 1 Health Insurance

Please enter all or part of the email address
eric

Pat #	Name	Address	City	Home Phone	Email
5	White, Eric	819 Nesbitt Drive	Mississauga	9055677567	ericwhite@yahoo.ca
17	Weston, Eric	657 Eaton Way	North York	4165900053	eric@gmail.com