Getting Started

Welcome!

This booklet is your quick start guide. It houses basic information about PMP, the PMP department, getting set up, basic processing, a few hints & tips and some report features.

We hope you will share with us all your comments and ideas! The pages listed below may assist you in locating items you need to get started.

Finding what you need

PMP Beginnings 1
Familiarizing Yourself with PMP 2
Fast Track Setting Up PMP 5
Processing 6
Hints & Tips 8
Great Reports 9
OCF Forms and HCAI 10
Networking 10
Getting Support 10
Making Changes to your PMP 11

PMP Beginnings

Thank you for choosing the ***Patient Management Program*** for your software needs. We are sure you will be delighted with PMP's ease of use, and will be comfortable knowing that you have made the right decision.

The PMP is used by approximately 2100 users throughout Canada and around the world. It has been customized to meet the needs and requirements of various provinces, and we have a standard version for offices outside of Canada.

PMP was created in 1991 by members of the Ontario Chiropractic Association (OCA). Tired of '*fly by night'* vendors and long wait times for industry changes, the Board of Directors decided to create and maintain their own software program. The benefits were obvious:

- *Longevity:* no worrying about the program still being around in the coming years
- *Updates:* created when legislated and industry changes occur
- *Enhancements:* Annual improvements based on the needs of chiropractors
- *Statistical Retrieval (Ontario only):* stats are collected on a volunteer basis providing the association with the ability to track industry changes in order to plan professional strategy
- *Support:* the comfort of knowing qualified and friendly help is a phone call or e-mail away.

PMP is designed by chiropractors for chiropractors!

Users are urged to relay their program requests so that everyone is involved in the creation of the PMP. The program has evolved over the years and the OCA is proud to be able to offer you the best in chiropractic software.

Know the Association and Your PMP Department

The Patient Management Program (PMP) Support department is located within the OCA office in Toronto Ontario. Kimbalin Kelly is Director of Operations and Lauren James is Manager, Software Support & Development. Anne Davidson, Liz Pridham, and Craig MacDonald are Software Support Representatives. Outside resources include Rick Scheibl, head Programmer.

Anne, Liz, and Craig will be your primary contacts in the Support Department. If you have PMP concerns not related to support, Kimbalin will be able to assist you and for programming or more technical issues, Lauren or Rick will contact you. If your concerns cannot be handled by the PMP department, the other members of the OCA team will be able to assist.

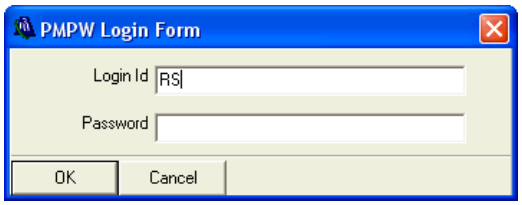
Lauren, Anne, and Liz have extensive knowledge gained from working in chiropractic offices and offering support. With a wealth of chiropractic experience they are able to understand your everyday needs and also many of the special situations you come across in your office! They LOVE chiropractic!

Familiarizing Yourself with PMP

This section will give you a quick mini tour to familiarize you with the most utilized areas of the PMP. Some areas indicate where you can find more detailed information in the Handbook or Manual.

Login

When you first open the program you will see the PMPW Login Form. This screen is controlled by Security and can be setup so that each user enters with their own ID and password. For Setup instructions go to Security section of the handbook.



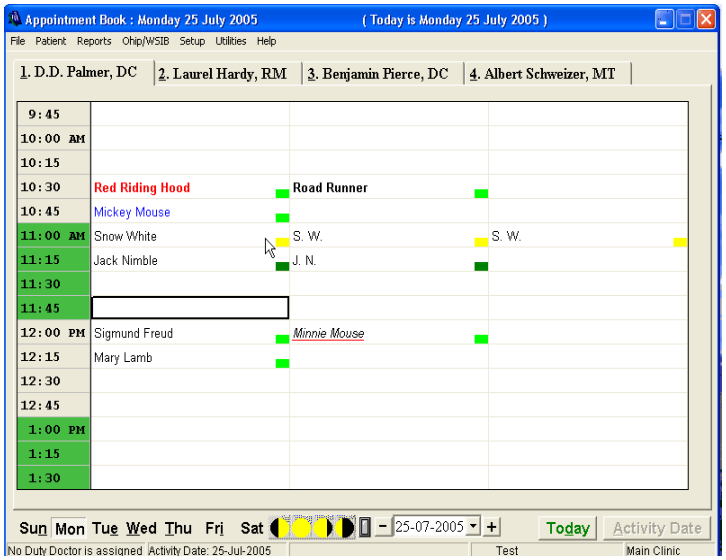
Type **RS** into the login field.

Type **RS** into the password field.

Click **OK** or press the **Enter** key.

Main Screen

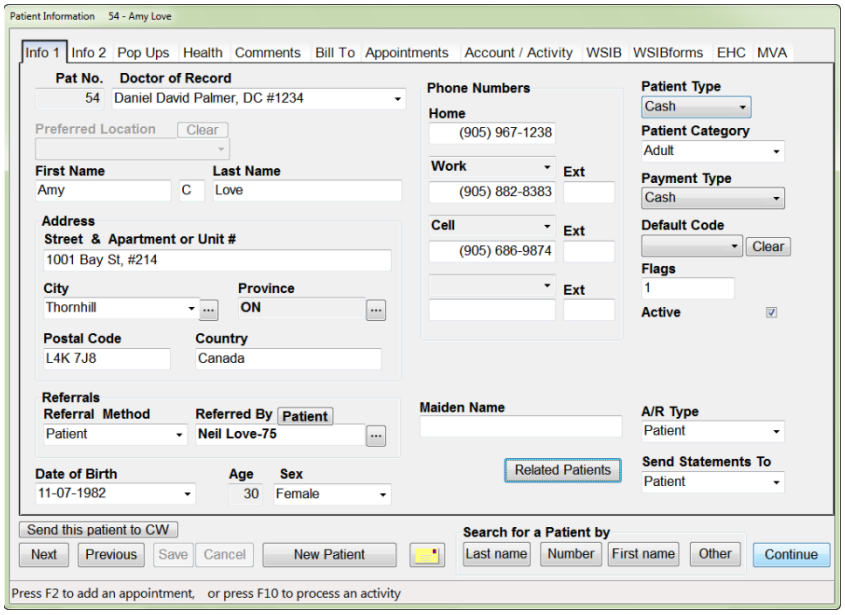
The Main PMP Screen is the appointment book. You will be brought back to this screen at the completion of most PMP activity. Details regarding the main appointment screen can be found in the PMP Manual.



Note: Screens appear different depending upon the province or country where your office is located.

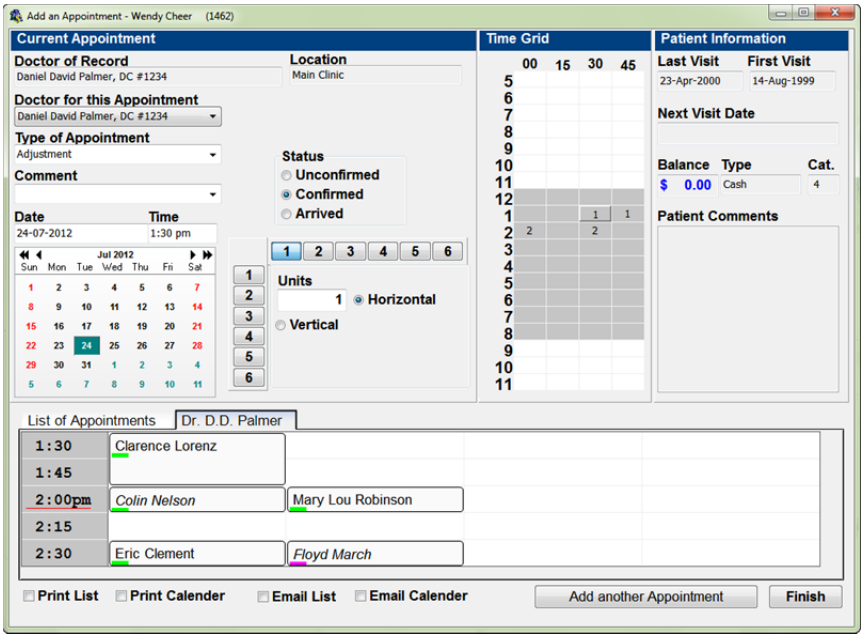
Patient Information

The Patient Information houses **all** information relating to the patient. It can be accessed by pressing **F6** on the main appointment screen and using the search buttons in the lower right to locate the required patient or by pressing **L** for a last name, **F** for a first name, and **N** for number search. You can also **Add a New Patient** by clicking the **New Patient** button at the bottom of the screen.



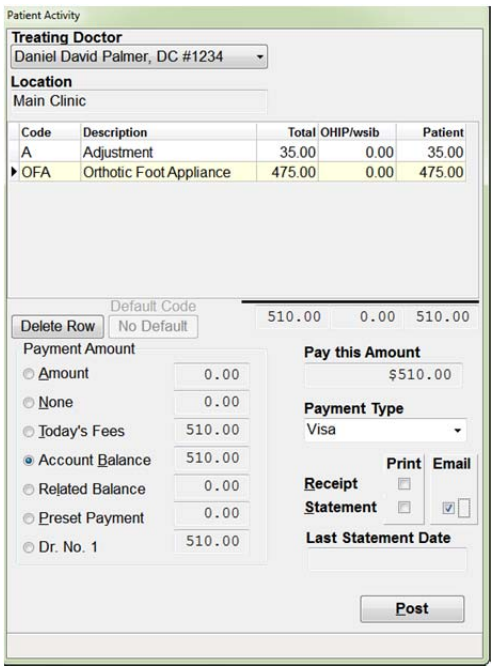
Appointment Booking

There are many ways to book appointments in PMP but the fastest way is by using the **F2** screen. Appointments can be booked in this section in seconds! Details can be found in the PMP Manual.



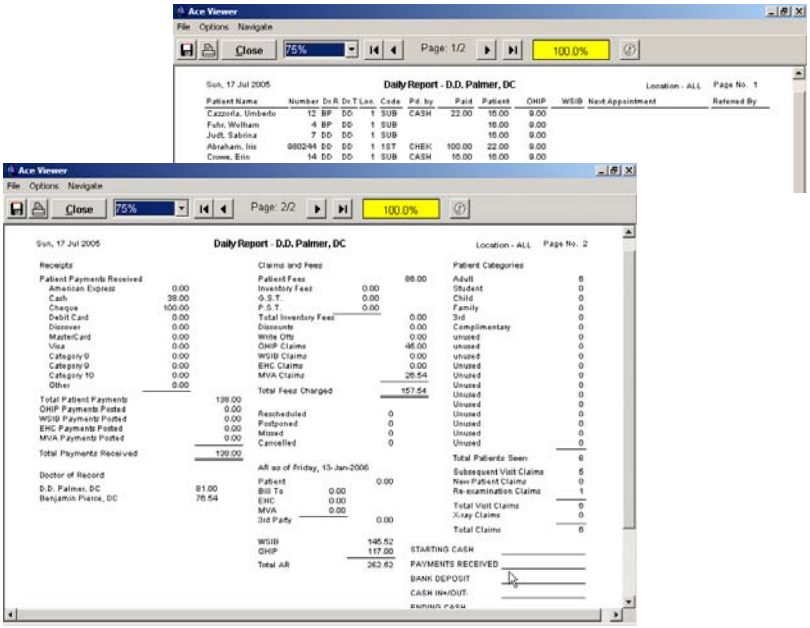
Activity Processing

Processing activity or transactions for a patient is done by clicking on the patient on the appointment screen or with the F12 button. Many details are available throughout the manual.



Summary Sheets

Pressing **F4** on the main appointment screen for a specific practitioner will automatically produce a Daily Summary Sheet for that practitioner. Information regarding Summary Sheets is located in the manual.



Fast Track Setting Up PMP

Now let's get you up and running! Quickly scan the sections mentioned and we should have you up and running in no time!

Setup

You will need to complete some basic setup, so you can book appointments and process patient transactions.

Customize Letterhead Personalized letterhead is created in the PMP WordPad and is printed at the top of patient statements. Check **Customizing** in the PMP Manual**.**

Clinic Defaults is the area where your office address and other information regarding your clinic is stored. Go to the **Setup** menu, **Clinic Defaults**. Click into each box to add or edit information.

Doctor Defaults Go to the **Setup** menu, **Doctor Defaults**. Choose a practitioner from the list and click **Edit this Doctor's Defaults**. Click into each box to add or edit information.
Note: Some fields may not allow editing. Contact the support line if you require a change in this area.

Patient Categories is a way of assigning different billings to different patients. You may have differing fees for patients that are adults, seniors, students, families, etc. Assigning categories to patients will allow you to post fees without editing. To Add a category click onto the first row entitled Unused and click **Edit**. Type the name of the category. Click **Save**. Click the **X** in the top right corner to exit this screen.
Note: Changes will not be visible until you exit and re-enter PMP.

Fee Classes **Manitoba Version Only** Fee Classes are used to determine which fees are treated as Initial Visits, Re-exams, X-ray visits and subsequent visits on Summary Sheets.
Fee Classes were also designed to determine what fee schedule items should appear in the description area on the lower portion of the MPI and WCB billing cards. If this area is not set up MPI and WCB billings will be incorrect. Details are found in the Manitoba handbook.

Edit Fee Schedule - input your treatment types and fees to allow you to bill your patients, provincial payers and/or Workers Compensation. Make your fee schedule codes simple and logical. Consider A, A1, A2, etc for different adjustment codes. M, M1, M2 for massage, P for physiotherapy, etc.
If your office sells inventory daily you may wish to add the more popular ones now. **Section 2** details Fee Schedule setup.

Doctors Hours. Each practitioner will need to be set up with the hours they are in the office. Go to the **Setup** menu, **Doctor's Hours**. Choose a practitioner and click **Edit this doctor's hours**. Highlight the practitioners available hours by clicking onto a start time on the grid and dragging your mouse to the end time on the right. Once highlighted, click **Set to the Doctor is In**. Continue in the same manner to set up hours for each day of the week. Click **Set to the Doctor is Out** to remove times. Click **Accept**.

Vacation / Holiday Schedule / Time Off. Set these up now if you already have vacations or holidays booked for your office. The **Office Holiday Schedule** will book off specific holidays that you set up for the entire office, for example Canada Day. The **Vacation Schedule** will book off vacation dates for specified practitioners. **Time Off** is used for other appointments, half days, etc.Go to the **Setup** menu, **Vacation/Holiday Schedule/Time Off**.

To setup Holidays click **Edit the Office Holiday Schedule**. Click onto a date on the calendar to highlight the cell. If you require more than one date drag your mouse to the right to highlight more cells. Click **Declare Holiday**. Type a name for the holiday in the pop up box that appears. Click **OK**. Continue in the same manner to set up more holidays. Click **Accept**.

To setup Vacations choose a practitioner from the list and click **Edit this Doctors Vacation Schedule**. Click onto a date on the calendar to highlight the cell. If you require more than one date drag your mouse to the right to highlight more cells. Once highlighted, click **Declare Vacation**. Continue in the same manner to set up more vacations. Click **Accept**.

To setup Time Off for other appointments, half days, etc. Choose a practitioner from the list and click **Edit this Doctors Time off**. Click onto a 'Start' time on the grid. Click on an 'End' time on the grid. Click **Book From-To off** to book off the times in between. Add a Comment to appear if you try to book into this timeslot. Click **OK**.

Processing

Let's start some basic processing!

Recording Patient Transactions

From the Appointment Book Screen. Click onto the Patient name on the appointment book screen. Click the **Activity (F10)** button.

Patients Without an Appointment. Press **F12** on the appointment book and select a patient by name or number. For example: type the first few characters in the patients last name. When you locate the patient double click or press **Enter**.

Click into the field below the word **Code** to show your Fee Schedule or type the first few letters of the code for the item you are searching for. For instance, if you type the letter **S**, the Fee Schedule opens and takes you to the beginning of the fees that have a code starting with **S**. Locate and click the item you are searching for. You can select one or more items. When all the fee transactions are chosen click the appropriate **Payment Amount** from the list below.

Click the appropriate **Payment Amount** from the list.

Amount	allows you to type in any payment amount in the box to the right
None	means no payment was made
Today's Fees	will pay the amount listed to the right which is the total of today's billings for this patient
Account Balance	will pay the total to the right which is the entire balance for this patient including today's fees
Related Balance	pays the total to the right which is the entire balance for this patient and all patients they are linked to in Related Patients on the Info 1 tab of Patient Information. This option cannot be used if someone in the related group has a credit balance on their account.
Preset Payment	will pay the total to the right which is the preset amount listed on the Account Activity tab of Patient Information.
Dr. No. _	will pay the amount listed to the right which is the total owed to the treating doctor only.

Click the down arrow under **Pay this Amount** and pick the correct payment type. You can choose to print a receipt (this lists today's transaction only) or statement (a list of transactions between specified dates) by placing a checkmark next to the option of your choice. Click **Post**.

Payment Only. To process a payment only, i.e. a cheque is received in the mail, press **F12** on the appointment book, select the patient by your method of choice and double click or press **Enter**. Press **F10** to bring up Payment. Click **Amount**, this will allow you to type the amount of the payment, or **Account Balance** which pays the amount listed to the right. Click the **Post** button to finish the transaction.

Activity Date. The Activity Date function allows you to change the date for processing previous daily activities. Go to the **Utilities** menu, then **Activity Date**. To set the date back click the left arrow on the calendar. Choose the month and click onto the appropriate day on the calendar. Click **Accept Changes**.

Once you have returned to the main appointment screen you will see a red border around the screen to warn you that you are in the past. Process the necessary activities. Print the summary sheet and attach it to the *original* summary sheet of that day to explain changes.

To return to today's activity go back to the activity date screen and click **Reset to System Date**, click **Accept Changes.**

Other Types of Transactions. There are many other types of transactions you will need to record in PMP. Below is a list of some common transactions that you will find in the manual.

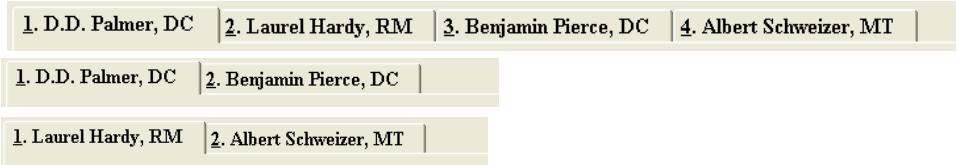
- Payment Only
- Patients That Do Not Have Appointments
- Transferring Credits
- NSF Cheques & Charges
- Write Offs
- Refunding Credits
- Editing a Transaction

Hints & Tips

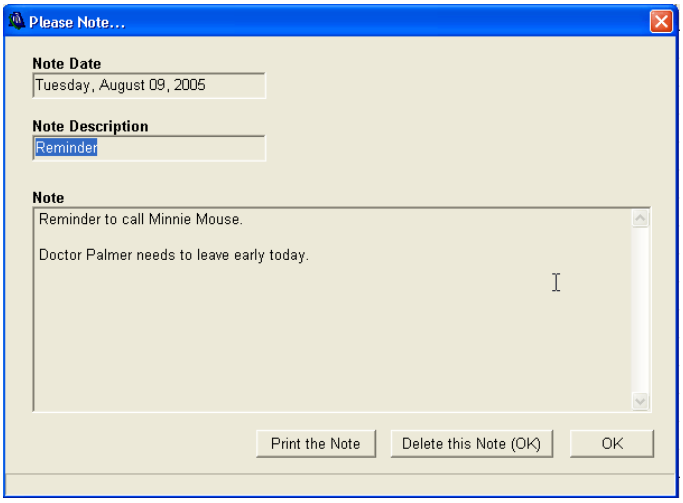
We have put together a few items that should make utilizing your PMP a lot easier! As you come across new ways of doing things and have your own great ideas, please share them with us. Often we have put suggestions from our users in our newsletters and we consider your experiences when helping others on the support line.

As you grow, we grow!

Appointment Books
The appointment book feature allows you to customize the appearance of the main screen in PMP to show your choice of practitioners in any order. The Appointment Book Sets contain any appointment books you choose and pressing the space bar will move you between books.



Notes
Notes are a way of writing reminders or letters to yourself or other staff in your office.

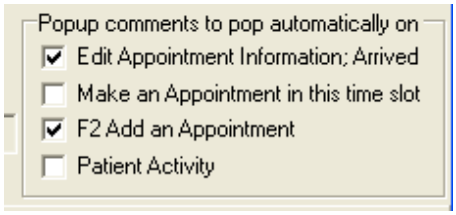


They are created in your setup menu. A post-it note will appear at the bottom of your appointment screen on the specified date and will open with a click of your mouse or can be set to open each time PMP starts.

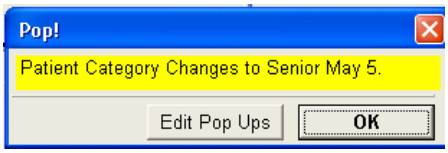
This option is found under **Setup, Computer Defaults, Show Today's Note upon startup.**

Pop Ups
Pop Ups are information boxes that will appear on a patient file giving you information about this patient or their appointment.

In **Clinic Defaults** under the **Setup** menu you can choose when and where the pop ups will appear.



Here is a typical pop up.



Flags
Flags are a way to group specific patients in order to print reports, labels, statements, and letters.
For instance you may wish to send out a letter to all patients that have attended a Spinal Health class. You would type the letter in the PMP WordPad and then select the flag of **S** from the query. Utilizing the merge feature the letter would then be personalized for each patient that has a flag of **S** in their patient information.

Merge
The PMP merge feature is an incredible tool that allows you to create form letters. PMP will personalize the letters by inserting information pulled from the patient file. Details are available in the manual.

Queries
The Patient Query area allows you to create patient lists using specific criteria, e.g. new patients, recalls, patient category change, patient type, etc. These are just a few of the reports you can generate. Once you have decided upon the type of report you can also choose the information you require and the manner in which to sort. All this at the click of a few buttons!

Recalls
PMP has an extensive recall management system. Used correctly it will keep you on top of those sometimes troublesome recalls.

Great Reports

PMP has some great reports; just check out the query area (listed above) and you'll see at a glance the capabilities. Other reports include:

- **Reminder List:** a list of patients that have been booked as ***unconfirmed*** appointments so you can make reminder calls. This report, detailing ***all* appointments**, is handy to take home if you are expecting in-climate weather on the following day.
- **Appointment Book:** a snap shot of your appointments listed on paper.
- **Fee History Report:** this gives you a detailed listing of every patient who has purchased whichever item you choose from the fee schedule between any dates you specify.
- **Detailed Service Report:** this report will show the amounts billed for each or all of the fee schedules; treatment, inventory, other, by specified dates.

- **Account Edit Journal:** the Account Edit Journal monitors any edits and deletions that are made in the patient Account/Activity screen and compiles them for printout.

- **Summary Sheets:** comprehensive, easy to read summary sheets created daily, weekly, monthly, quarterly, and yearly. Available by individual practitioner, partnership (practitioners listed on appointment book setup) and the entire clinic.

- **Inventory Sales**: details monthly and yearly sales.

OCF Forms and HCAI (Ontario Version)

A PMP HCAI interface is available that allows PMP users to send OCF forms and claims created within PMP to be sent directly to HCAI. The program is intuitive and has an easy-to-use interface. A PMPHCAI icon appears on your desktop.

Here are just a few of the benefits for using the PMP HCAI interface:

- information transfers from the patient file to OCF forms and then all details copy to additional n reports, reducing the amount of time required for completion of subsequent forms
- OCF forms & invoices are created in PMP and do not need to be duplicated on the HCAI website
- Claims and forms are made and stored locally, on your computer
- Claims and forms are created without access to the internet. An internet connection is required only to send completed forms.

Note: In order for PMP users to use the PMP HCAI interface for electronic submission of auto insurance claims and forms you must be registered with HCAI and have selected your submission method as PMS.

Networking

You may wish to set up PMP on a network. This task can easily be accomplished once your computers are networked.

Networking instructions for PMP are contained in the printed installation instructions that came with your program, and a copy is available on CD.

Getting Support

Check the Manual	
Email the Support Line **support@chiropractic.on.ca**	Make sure to include your name, PMP Support number, Doctors full name, and a phone number in case we need to call.
Phone the Support Line **416-860-7199** **1-800-561-7361**	Please leave the following information when you call: Doctor's name, your name, User #, Phone # with area code, Nature of the call, Good time to call back.

Fax the Support Line **416-860-0857**	

Making Changes to your PMP

There are many times when changes need to be made to your PMP program. You may have a new associate joining your practice or one practitioner replacing another. An associate may leave, and perhaps want to take their patient files to input into their own PMP program. You may also have someone joining you who uses PMP in another facility. Whatever your needs, we've probably come across it before – and we have ways of managing most things. Below we have listed some common changes for PMP and the associated costs and procedures.

Adding a Practitioner

To add a practitioner to your PMP program complete the PMP Order Form and User Agreement. The form is available:

- on the OCA website – www.chiropractic.on.ca. Locate PMP Website and click on the required form on the right of the screen
- on the PMP CD. Once you have opened the CD go to Brochures and Order Forms
- by calling the support line at 416-860-7199 or 1-800-561-7361
- by emailing the support line at support@chiropractic.on.ca.

Note: Confirm that you have the current order form by reading the date on the lower right of the form. Once the form has been completed and the payment processed (usually within 10 business days) you will receive an email containing the order. The process for adding the new practitioner to your PMP is clearly detailed in the accompanying instructions. This process should take less than 5 minutes to complete. To simplify this process please make sure that you provide an email address that does not remove or block attachments, i.e. not a hotmail or g-mail account.

The costs for adding practitioners are detailed on the order forms.

Deleting a Practitioner

Deleting a practitioner will remove the practitioner from the tab list across your PMP appointment book and from the drop-down menus but it will not delete any patients or patient information. During the deletion process, you will be prompted to assign a new Doctor of Record to all of the patients who are currently assigned to the practitioner that you are deleting. All transaction history for the departing practitioner will remain. If you would like to delete the transactions performed by the departing practitioner, please choose the Extract a Practitioner program.
Backups can be restored to view deleted information.
There is no charge for this utility. Order by contacting PMP Support.

Extracting a Practitioner

This program will extract a practitioner from your Patient Management Program. This means that the practitioner will be removed as well as all patients who have that practitioner as their Doctor of Record. All transaction history with the extracted practitioner will be removed. A copy of the patient file will remain on the system when the patient has been treated by another practitioner in your office. All transaction history with the other practitioners will also remain.
You will be prompted to assign a new Doctor of Record during the extraction process for all the patients who have been treated by another practitioner in your office.
During the extraction process a backup will be created for the extracted practitioner that includes the practitioner, his/her patients, all transaction history with the extracted practitioner, and a copy of any patient files belonging to other practitioners if the patient was treated by the extracted practitioner. Only treatments with the extracted practitioner will be included. The backup can then be used by the departing practitioner to install in his/her own PMP program.
There is no charge for this utility. Order by contacting PMP Support.

Merging Existing PMP Users

On occasion practitioners will join forces and combine their existing practices. If they are both using PMP we have a process to combine the separate PMP's into one database. Additional charges apply. Contact support for details.

Convert Case

PMP has a function to create forms and letters to your patients which are personalized with information pulled from the patient file. If your patient information was input using UPPERCASE text the documents you create will look like form letters and will not appear personalized.
We have a fix for that! A utility program has been created that will change all patient information to title case, the appropriate combination of uppercase and lowercase. This utility is available at no charge and takes approximately two minutes to run. It is located on the PMP CD. Print instructions by opening the **CD/Utilities/Utility Programs/Convert Case Utility.pdf.**