Welcome to ChiroSUITE!
New Clinic/New Staff Guide

Welcome to ChiroSUITE! 😉

We have put this guide together to assist new clinics and new staff members get their bearings in ChiroSUITE, it's also a great refresher for seasoned staff & Business Owners. We recognize that no office is the same and encourage you to use our recommendations as a guideline only. It's important you have your own policies and procedures in place when it comes to staff training and practice management.

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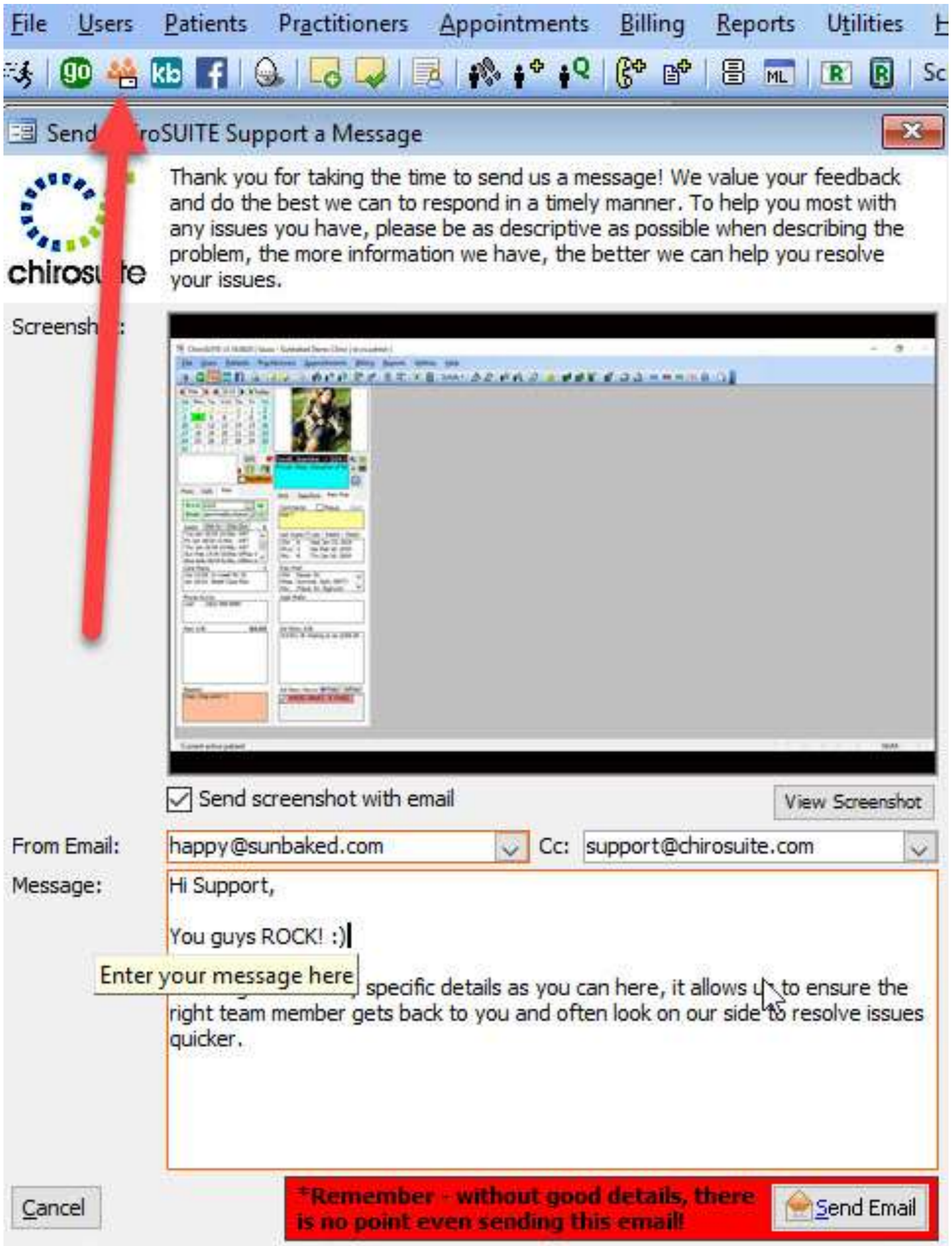
kb Wherever possible throughout the document you will see this Knowledge Base icon followed by a few keywords to use in your search, this should bring you to an article in our online manual that we feel will help!

Contents

1. Contacting ChiroSUITE

A. Email directly through ChiroSUITE, doing so grabs a picture of the screen you're working on. Be brief but provide as many details as possible (same rules apply to phone messages). This helps us ensure the correct team member responds to your email, we all have our niche here at ChiroSUITE! In many cases this also allows us to look in your backup and resolve your issue before getting back to you, quicker & efficient for all!



B. Email support@ChiroSUITE.ca.

C. Call 855-509-1111 press "2" at the auto attendant, regular support hours are M-F 8:30-4:30 MST.

D. After hours Emergency Support 855-509-1111 press "9" at the auto attendant.

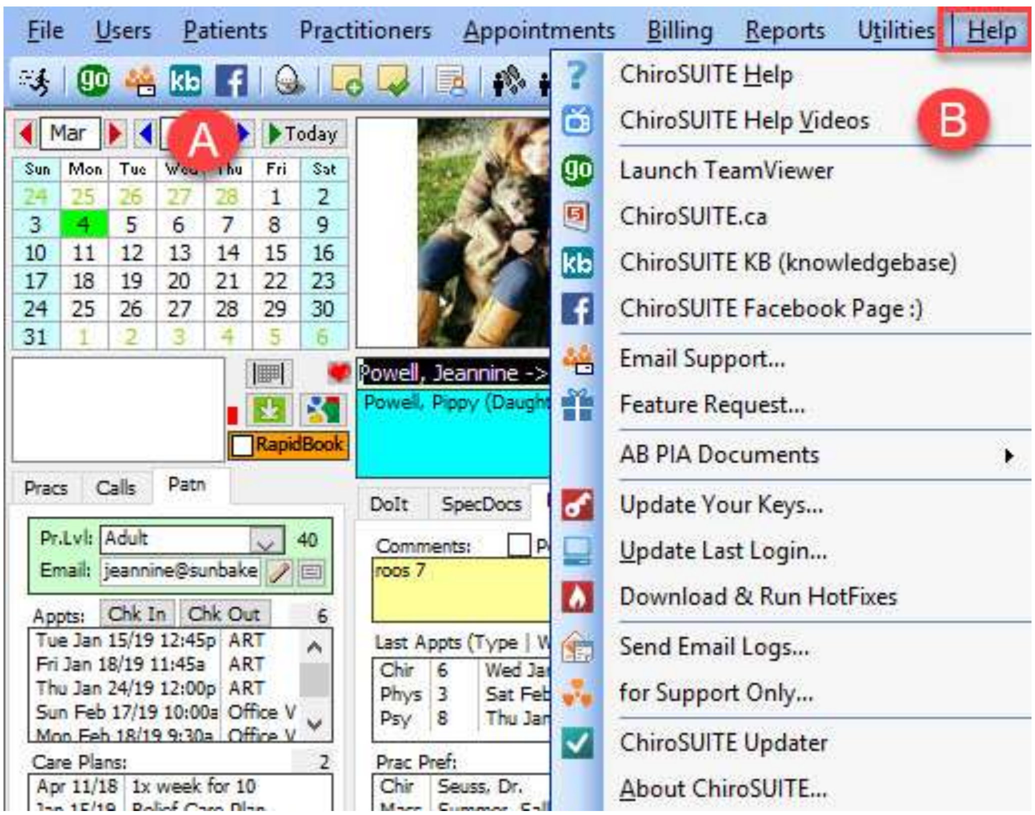
Tip! It is not necessary to call & email support, one point of contact only please. IF the matter is urgent, CALL! We prioritize phone calls over emails, although do aim to respond to both in a timely manner.

2. Knowledge is Power

We encourage you to master the program & want to empower you to learn with many resources at your fingertips!

A. Icons to our KB site & Facebook Page. Our KB site is your online manual for ChiroSUITE, 100+ "How To" articles can be found here. **Tip! When using "search" to find an article you want to keep it brief, one or two words only**. Search in our KB site does not work in the same way you search Google. "Like" our Facebook page or visit it regularly for weekly tips & tricks along with the occasional funny. 😊

B. Help->ChiroSUITE Help Videos, an endless resource of training videos, they can be launched and watched immediately, or the link emailed to view later. **Tip! The link does eventually expire to protect the integrity of our program & if the videos do not immediately launch you will want to "Allow Popups".**



3. Training

In conjunction with training; whether with Susan for new clinics or the office manager for existing clinics, we believe it should be mandatory for all new staff to watch training videos. We also encourage veteran staff to watch them for a refresher, you'd be surprised the many incorrect uses of ChiroSUITE that get passed down from one assistant to another. You don't know what you don't know! The videos can help here. 😊

Help->ChiroSUITE Help Videos

We suggest starting with Training Videos 1-4, take on the others as new staff become more familiar with the program or are trying to do a specific task.

SOAP

- Care Plans Webinar Sept/2017 | 49m
- SOAP Demo | 25m
- SOAP Setup 1 - Adding a New Date Range | 3m
- SOAP Setup 2 - Adding a New Question Group | 1m
- SOAP Setup 3 - Editing a Current Question | 5m
- SOAP Setup 4 - Creating a New Question and Linking | 8m
- SOAP Setup 5 - Deleting a Group or Question | 2m
- SOAP Setup 6 - Adjusting Techniques and Pen Styles | 3m
- SOAP Setup 7 - Speedkey Setup | 8m
- SOAP Setup 8 - Odds and Ends | 5m
- SOAP: Copy Forward | 3m
- SOAP: Do It Later | 2m
- SOAP: Overview | 2m
- SOAP: Resolution | 4m
- Adding a New Practitioner | 6m
- Quick Lock Code Setup | 3m
- Scanning & Document Review | 14m

Training/Webinars

- 3rd Party "Advanced Level" Webinar Mar/2017 | 38m
- 3rd Party Webinar Feb/2017 | 53m
- Accurate Checkouts Webinar May/2017 | 26m
- All Things Inventory Webinar June/2017 | 20m
- Call List/Patient Management Webinar Apr/2017 | 36m
- Care Plans Webinar Sept/2017 | 49m
- Consent Setup & Tracking Webinar April/2018 | 15m
- DoIt, Email, Reminders Webinar Oct/2017 | 35m
- Mailing Lists, Gift Certs Webinar Nov/2017 | 30m
- Online Booking Webinar July/2017 | 54m
- Retention, Growth & Marketing Webinar Feb/2018 | 34m
- Training 1 (1 of 4) | 17m
- Training 1 (2 of 4) | 24m
- Training 1 (3 of 4) | 19m
- Training 1 (4 of 4) | 23m
- Year End prep & cleanup Webinar Jan/2018 | 27m

4. Daily Tasks

A. SOD/EOD (Start of Day/End of Day)

Many daily tasks can be setup to happen when you process SOD/EOD; from appointment reminders to schedules emailed to practitioners, the options are endless and can be customized to suit the needs of your office.

SOD is a great way to ensure reminders are sent immediately, leaving phone calls on your list for the day.

EOD won't process if there are open appointments in the system (not checked out, WHY would you not check out all appointments for the day?!), it can sync online booking/Google calendar, & generate your Cash Out Summary amongst other tasks.

Tip! Every office should be doing SOD/EOD.

kb SOD

B. Call List Management

After running SOD for the day, go to your "Calls" tab, filter "Just Today" and deal with any phone call reminders that need to be done as well as follow up with patients on the call list who need to be rebooked. **Tip! It's important to stay on top of call list management, meaning, the call list should only ever have current and forward dated reminders/calls on it.**

kb Call

C. Balance your Cashout Summary to your POS

An absolute must! Again, why would you NOT balance your cash drawer, point of sale machine, & ChiroSUITE?!

kb Cashout

5. Weekly and/or Monthly Tasks

A. Income Statement for Paying Practitioners

Depending on your pay cycle you will need to generate Income Statements for paying practitioners. **Tip! Although this is the report used for most offices, it's not for all, depending on the financial arrangement between the business owner and practitioner/s.**

kb Income

B. Accounts Receivable Aging Report

We can't stress enough how important it is to run your AR Report by both 3rd party and private patient, monthly. This allows for immediate follow up and collections, ensuring your office isn't losing revenue. Outstanding amounts 60 days and over can often be difficult to collect, it's important to stay on top of your AR.

kb Collections

C. Computer Maintenance

Just like your spine, computers need regular service too! Windows Updates, Anti-Virus Updates, Check Disk, & regular reboots are important for a healthy computer.

kb Computer

D. Recare Reports

Some offices follow up with patients who have not been in for treatment/fallen off their care plan. Generating Recare Reports allows offices to check in on patients and encourage them to continue care. **Tip! Get in a regular routine of running this report. Ensure your office has strict guidelines on how often and how many times a patient is followed up on, you don't want to hound people or peeve them off.** 😉

Example

- After 2 weeks light friendly email reminder goes out, patient is due in for an appointment.
- After 6 weeks, another light friendly check in, phone call or email.
- After 3 months practitioner touches base.
- After 6 months postcard sent, and file is inactivated

Again, just an example, it's imperative your office puts policies in place that make sense for you.

kb ReCare

6. Features & FYI's

SOAP/EMR

We have over 100 clinics who are successfully paperless, we offer fully customizable templates for all practitioner types in your office.

kb SOAP

Online Booking

We had 50,000+ appointments booked online for 2018! Imagine what your Chiropractic Assistants could be doing instead of answering phones. Patient education, staying on top of A/R, reaching out to patients to get them back on their Care Plan. The options are endless!

kb Online

SpecDocs

Special Documents (SpecDocs) are one of the TOP features that offices LOVE! SpecDocs are typically intake forms, exercises, supplement information, and basically any document you are commonly providing to your patient. These documents can quickly be accessed and either emailed or printed for patients during a visit, during their first appointment setup, and even on checkout. Most commonly we see clinics use this area for New Patients who call into the office - within seconds of booking their first appointment, they receive an email with intake forms attached. The customized email template that the SpecDoc is attached to can talk about your office location, fees, policies, etc. We also have an abundance of fillable forms for MVA AB's and Imaging Requisition Forms available to you.

kb SpecDocs
kb Fillable

DoIt Task List

DoIt is a paperless "post it". When used well it's a great task list for internal use as well as a "to-do" list for patient accounts. Tasks can be set for specific dates, users, & can also be set as reoccurring. For the list to work well, it's imperative that it is kept up to date and managed on a regular basis.

kb DoIt

Rapport

A great "at a glance" section of ChiroSUITE which tells you pertinent details about your patient's that you don't want to forget. This area is more for personal details unrelated to patients care. IE: "Jacob wife's name is Claudia, she is expecting their first child. Love dogs. Sports. Meditation, & Yoga."

kb Rapport

Email/Test Reminders

Email and/or text appointment reminders can be setup on patient accounts. We highly recommend as many patients as possible be setup for reminders, this helps decrease no shows and increase retention.

kb Reminder

Practitioner List

The practitioner list in the "Pracs" tab on the left-hand side of the screen MUST be kept current. ChiroSUITE bills based on the number of active practitioners, for fee schedule see chirosuite.ca

kb Practitioner