ChiroSpring

Getting Started Checklist

We have created a checklist on some of the important elements you need to complete to ensure you are ready to go live with ChiroSpring. If you have questions on any of these items, please let us know.

Websites you will want to bookmark are:
Install ChiroSpring: www.installChiroSpring.com
Customer's Portal: https://info.ChiroSpring.com/desktoptraining
Cloud ChiroSpring: www.cloudChiroSpring.com

☐ 1. Install ChiroSpring onto all computers. PC users will install the ChiroSpring Installer Tool. ChiroSpring auto-updates for PC users. Mac users must install Firefox ESR and **set it to never update**. Procedures can be found here: www.installChiroSpring.com .

☐ 2. Ensure, when provided, you keep your ChiroSpring Customer ID and secure PIN (we mail this to you) on file. You will not want to lose these.

☐ 3. Ensure all staff have read the user manual and watched all training videos. You will operate much better if you have done this. You can find them in our Customer's Portal.

☐ 4. Determine your clearinghouse (Office Ally, Etactics, Waystar, Infinedi, Trizetto, Smart Data Solutions, BCBS-MI)

- If billing CMS-1500.txt submit a batch of claims for your clearinghouse to map
- If billing EDI ensure you have setup your clearinghouse in Settings/Insurance/Clearinghouses. Providers will need their name, address, DOB, phone and email in Settings/Users.

Search our Help Center for your clearinghouse for specific guidance.

If you are using a clearinghouse not mentioned, it might work. The ones above are the ones we have tested.

☐ 5. All Insurance Carriers have been put into the Insurance Carrier's app in Settings.

- For EDI you must have a Payor ID and proper claim filing indicator for your insurance carriers (see EDI Options tab).
- For Medicare we created a guide on Medicare as primary, Medicare as secondary and Medicare with Medigap. You can search our Help Center for this our download from our Customer's Portal.

You can also set the Edit Allowed Amounts.

☐ 6. If ChiroSpring is importing patients from your previous software let us know ASAP so we can assist.

☐ 7. Perform patient balance transfers to provide patient balances in ChiroSpring. Create a product called "Balance Transfer". Open Cash Register, select your patient, then product and change the price to the patient's balance. Then click "No Receipt".

☐ 8. Setup all of your user accounts. You can block any app, dashboard tile, SOAP note tab as well as set more user options in Settings/Users.

☐ 9. Customize your calendar and setup your work schedule (Settings/Calendar).

☐ 10. Setup your Rooms for Patient Flow (Settings/Rooms).

☐ 11. Setup your Visit Types and default colors/length/occupy columns (Settings/Visit Types).

☐ 12. Setup your Block-out Calendar Types in Settings/Block-out Calendar Types. Block out time on your calendar by right clicking and selecting 'Add Block-out Time'.

☐ 13. Ensure you have properly entered your provider NPI, Billing NPI, Tax-ID and other billing information for your practice (Settings/Practice Info and Settings/Users). You can preview a claim to determine if things look correct.

☐ 14. If printing CMS-1500 claims ensure you have calibrated your printer with a blank CMS-1500 form (Settings/Forms).

☐ 15. Setup prices for all products and services. Determine if products are taxable. Determine if products or services can automatically copy to the next visit (e.g. you would want to disable this for an Exam most likely). Settings/Products and Settings/Services.

☐ 16. Ensure you have set your tax rate in Settings/Practice Info/Facility Locations.

☐ 17. Determine from a global level if you are accepting copay, coinsurance and deductible (Settings/Practice Info/Charge Options).

☐ 18. Determine if you want payments to automatically apply to charges. They can apply to oldest charges first or charges matching the same visit date. Settings/Practice Info/Charge Options.

☐ 19. Customize your charges grid (Settings/Pin Charge Codes). This is on a per-user basis. Once you have charges pined how you want them other user's logging in can use the 'Copy From User' option to make their charges grid match yours.

☐ 20. Pin your favorite diagnosis codes to folders (Settings/Diagnoses/ICD10 Associated Text). This is a global setting.

☐ 21. Customize your SOAP Macros

- Create SOAP Macros (Settings/SOAP Macros Basic or Advanced SOAP Macros). Use the Nest SOAP Macros app to place Macros into folders.
- Pin SOAP Macros (Settings/SOAP Macros/Pin SOAP Macros)

We have a full training video on SOAP Macros in our Customer's Portal.

☐ 22. Setup "How Heard About" options in Settings/How Heard About. These are used in the Practice Analysis and How Heard About reports. If you use the patient kiosk this option will be asked for patients to complete.

☐ 23. Setup your default appointment type (Settings/Practice Info/Facility Locations). As an example, if 90% of your visits are an Adjustment you might want new appointments to default to this for faster scheduling.

☐ 24. Create a custom receipt and statement footer (Settings/Practice Info/General). The footer will appear at the bottom of the receipt or statement.

☐ 25. Setup Appointment Reminders. This requires an account with www.remindercall.com. You would then copy and paste a specific username and password from Settings/Patient Messaging/Appointment Reminders into www.remindercall.com.

☐ 26. Schedule training with our support staff. Times fill quickly so we require a weeks notice for best availability.

☐ 27. If using multiple locations setup your default location. This can be per computer or per user.

- Settings/Practice Info/Faculty Locations/Default Facility Location For This Computer
- Settings/Users/Service & Billing Location/My Preferred Location

You also need to set your Primary Access. Settings/Users/Provider Info 2. If you are using the desktop app select this option. If you are using Cloud ChiroSpring select this option. Default location uses this setting so make sure it is correct. You can of course change it at any time.

☐ 28. Arrange the order of your Dashboard Tiles (Settings/Arrange Dashboard).

☐ 29. For PI Practices add your attorneys (Settings/Attorneys). This list will be available inside the Insurance Cases tile within a patient dashboard.

☐ 30. If using Integrated Payments, you can sign up for ChiroSpring Pay in Settings/Practice Info/Integrated Payments.

☐ 31. Customize your charges colors (this is based on Billing State). As an example, you might want bill primary to be blue and bill secondary to be red. Settings/Practice Info/Charge Options.

☐ 32. Set your option for Patient Statements to not show charges that are NOT reconciled. As an example, you might not want an x-ray charge to appear on a patient statement until you have gotten the remittance back from insurance and reconciled the charge.

This option is in Statements/Non-Reconciled Insurance Charges.

☐ 33. If using the Online Scheduler or Patient Kiosk ensure you have created a password for them (this is a separate password from your ChiroSpring password. However, you can make them the same if you want). Settings/Users/Kiosk Online Scheduler Password.

☐ 34. Online Scheduler – Make sure you have all your provider's work schedules setup correct. Also, you will need to pin which visit types you want shown on the online scheduler: Settings/Users/Online Scheduling.

In addition, for any visit type you want shown on the online scheduler you must mark it "show" using the 'Online Scheduler Status' dropdown. This is in Settings/Visit Types.

Set an email address for appointment requests to send to in Settings/Practice Info/Online Scheduling. If blank emails will be sent to the provider's email address (if one was entered in Settings/Users).

We have a full training video on our Online Scheduler in our Customer's Portal.

☐ 35. Patient Kiosk – Customize which sections (e.g. smoking status, demographics, etc.) you want shown. You can set them to show for the first visit or all visits. Also determine if you want a section to be required. This is on a per-provider basis so ensure you have set these up for all providers. Settings/Kiosk/Kiosk.

Also upload your acknowledgments (as text only) and create additional intake questions. Use leading questions (yes/no questions that when marked 'Yes' will display all questions inside that category to the patient.

We have a full training video on our Patient Kiosk in our Customer's Portal.

 36. Contacts can be exported in Settings/Export Data. You can import these into services like Constant Contact or Mail Chimp for marketing. You can also export missing in action patients to put them into a marketing funnel.

 37. SOAP notes can be created for past visit dates. Schedule the patient for this date/time (in the past). Then right click on them (on the Calendar) and select Edit SOAP.

 38. I am familiar with the guarantor option in the patient profile. This allows me to put Mom/Dad as a guarantor for a patient. The patient statement will then be addressed to the guarantor.

 39. I understand how to set a product or service as "Bill to Insurance". If set to 'No' the product or service would never appear on a claim. (Settings/Products or Settings/Services).

 40. I understand how to put an insurance case on hold (drop down on the top of the Insurance Case). When on hold, charges will not appear on claims until the hold is removed. Inside the Billing app is a Hold folder so you do not lose track of these charges. You can remove the hold inside the Billing app or inside the Insurance Case.

 41. ChiroSpring provides an iOS app called ChiroSpring Browser. This allows full access to the ChiroSpring software. Search for "iOS App" in our Help Center for details.

 42. I understand the ChiroSpring staff is helpful and friendly and want me to succeed. If I get stuck, I will work with ChiroSpring to resolve any issues. :)

 43. I have read and understood the following:

- Making a change in settings requires a full exit of ChiroSpring. Then re-open (this refreshes the database).
- Reconciling insurance payments is a MUST. If not performed accounts receivable will never be correct.
- The Recent Patient's list on Front Desk only displays recent patients. Press 'Enter' after typing a partial name to query a full database return.
- Fast internet and a business class router with no WiFi dead zones are a must.
- The Help Center can be accessed 24/7 in Launcher/Help Center. There are over 800 searchable articles here that we wrote to help you.
- Exported claims are found in your document's folder in Documents/ChiroSpring/Exported Claims.
- How to rebill charges.
- The Charges Report (located in Dashboard/Insurance Cases) is beneficial for attorneys.
- I understand how to add a payment to a patient using Dashboard/Ledger.
- I understand how to print a patient ledger and visit receipts (Dashboard/Ledger and Dashboard/Visits).
- I understand workflow is important and the same user cannot edit the same data element at the same time. The Front Desk Awaiting Checkout column is designed so the Front Desk knows the provider is done with the patient and can safely be checked out (e.g. provider is not actively editing a SOAP note at the exact time a patient is being checked out). Providers can complete their note after the patient has been checked out.
- If using Mac Catalina or beyond the ChiroSpring desktop app is not supported. Users can use Cloud ChiroSpring or Parallels Desktop (this is actually really awesome as you can then use the PC ChiroSpring Installer Tool and have the software automatically update).