ChiroSpring

Getting Started

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Setup Page

- Add your facility address, phone/fax, website, etc.
- Add your practice's contact email
- Group NPI and Tax ID, (we will add during your customization training)
- Taxonomy Code, add if applicable
- Alternative facility locations (for claims), if applicable
- Set time zone

Import Demographics

Learn More

- Download our sample CSV file (click Download CSV Template)
- Delete the sample data and replace with your real data. Make sure you do not edit the header names on Row 1 (e.g. firstName, lastName, cellPhone, etc.)
- Once your CSV file is ready to import, choose the 'Import File' option and select your CSV file
- You may repeat this process at any time should you want to import a list of leads to market toward

Import Patient Balances

Learn More

- Download our sample CSV file (click Download CSV Template)
- Export patient balances from your previous EHR
- Manually type the patient balances from your previous EHR into the ChiroSpring CSV
- Import the CSV back into ChiroSpring

Import Patient Credits

Learn More

- Download our sample CSV file (click Download CSV Template)
- Export patient credits from your previous EHR
- Manually type the patient credits from your previous EHR into the ChiroSpring CSV
- Import the CSV back into ChiroSpring

Import Products

Learn More

- Download our sample CSV file (click Download CSV Template)
- Delete the sample data and replace with your real data. Make sure you do not edit the header names on Row 1
- Once your CSV file is ready to import, choose the 'Import File' option and select your CSV file
- You may repeat this process at any time should you want to import additional products

Users & Rooms

Learn More

Create a user or room

- Set content for Taxonomy Code, Provider NPI, and overrides (if needed) for boxes 25, 32, 32a, 33, 33a
- Set default facility (if needed). Useful for practices with multiple address locations.
- Set scheduler order and max appointments per time slot (e.g., set 3 if you schedule 3 across a given time) *online appts
- Enable Save & Sign treatment notes. This is done in two places. Here and Here (bottom of Note Settings tab).

Access Type/User Roles

Learn More

You may select one or multiple access types per user.

- Administrator – full access
- Provider – sign notes, cannot view billing reports
- Billing – cannot sign notes
- Support – scheduling only
- Clinician – A limited provider role often used with colleges
- Intern – A very limited provider role often used with colleges

Treatment Note Defaults + Ditto Settings

Learn More - Create Treatment Notes

Learn More - Ditto Settings & Advanced Ditto Configuration

We provide over 50 treatment note templates and you can create your own.

- ✓ Choose the treatment notes you want to use in the system
  - On Treatment Dashboard
  - On EHR Menu (quick access left of selected patient on top)
  - On mobile
- ✓ Order your templates to show most frequently used at the top (0 being top item and highest number being bottom item)

Ditto Settings – Treatment Notes (copy last note into current note)

- ✓ Practices generally choose Ditto from that provider's most recently edited or created treatment template

Ditto Settings – Fee Slip (copy last fee slip into current fee slip)

- ✓ Practices generally choose Ditto from that provider's most recent fee slip

Favorites List

Create custom products, services and fee schedules. You may also customize which diagnosis and services appear as favorites on the fee slip.

- ✓ Create Products
- ✓ Create Services & Set your favorites
- ✓ Diagnosis Favorite List
- ✓ Fee Schedules – Create Fee Schedules and add services to them. Fee Schedules are used for non-insurance visits.

Appointment Reminders

Learn More

Appointment reminders help prevent patients from missing their appointments.

Standard Reminders (Included with all ChiroSpring plans)

- ✓ Enable reminders (turn on only when you are ready for them to be sent out. We do not do this for you).
- ✓ Choose SMS or Email for mode of reminder (SMS is the most popular)
- ✓ Choose when to send (e.g., 1 day before appointment). With GrowthHub Pro's enhanced reminders you can set up to six reminders per appointment.
- ✓ Choose if you want multiple or single reminders sent when patients are booked for multiple visits on the same day
- ✓ Set your customized message

Enhanced Reminders (requires GrowthHub Pro)

- ✓ Set a cadence of up to six reminders per appointment
- ✓ Enable Appointment Confirmation (patient sent a communication as soon as the appointment is booked)
- ✓ Custom reminder text (per appointment category). As an example you might want to have a special message for new patients to remember to arrive 15-minutes early and bring their insurance card.
- ✓ Enable birthday reminders and create default message

Note: Reminders will not be sent for appointments created today. You may create a custom template to message your patient on same day bookings (GrowthHub Pro).

Third-Party Payers

Learn More

- ✓ Add your third-party payers (insurance carriers) such as BCBS, Aetna, Medicare, etc.
- ✓ Click the "Configure" button to mark charges as covered and set allowed amounts (used for PMR estimation)
- ✓ Ensure Payer ID is entered (if using ChiroSpring's clearinghouse we will enter for you)
- ✓ Choose EDI if you want claims from that insurance carrier to generate as EDI (electronic)
- ✓ Choose default clearinghouse (if using ChiroSpring clearinghouse we will choose for you)
- ✓ If an insurance carrier requires a special workaround let us know and we can help

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Patient Member Responsibility (PMR)

Learn More

ChiroSpring supports PMR (patient member responsibility) to provide accurate estimates on what your patient owes during checkout. This includes copay, coinsurance and deductible as well as visits remaining on chiropractic or therapy services. Please review our full PMR Guide for details.

- First, ensure you have PMR enabled globally under Customization Settings. There are three checkboxes (enabled by default).
- When setting up your third-party payers click the "Configure" button to mark charges as covered and set allowed amounts (used for PMR estimation). If charges are not marked as covered then PMR will not be used on those charges when checking out your patient.
- Add your patient's benefits and insurance verification (copay/coinsurance/deductible) under their Insured's Information section

Fee Schedules

Learn More

Fee Schedules are used for non-insurance visits to provide discounts (e.g. hardship, CHUSA, etc.). As an example, you may want to create a fee schedule called "Senior Discount" and set an alternative price to your general clinic plan (default pricing). Fee Schedules cannot be used with insurance.

- To add a new fee schedule click the "Fee Schedules +" at the top
- Next, add the prices for each CPT code under "Charge Amount"
- For states requiring tax on services enable per CPT code and set tax percent (top right)

Reminders (Stop Managers)

Learn More

Our Patient Reminders (Stop Managers) serve as an effective way to be notified for anything important about your patient. Patient reminders can be set to trigger (alert) in various sections of the software such as front desk, scheduler, check-in or check-out and can even have a repeat occurrence if desired.

- Create Reminder Types
- Add reminders to your patient on the Reminders Dashboard

Scheduler & Appointments

Learn More

- Set your visit types (e.g. New Patient, Adjustment, X-Rays)
- Set length and color (shown on scheduler and front desk)
- Set reminder – when 'Yes' patients will be sent reminders when scheduled with this visit type
- Set show online – when 'Yes' this visit type will be shown with online scheduling
- At the bottom click "Edit Scheduler Settings"

  Start/End Time

  Time Increments (e.g. 15 minutes)

  Auto Scroll (calendar scrolls with current time)

  Patient display name
- Link forms (to automatically send) to Appointment Categories
- Create Time Blocks on the scheduler. Add a new appointment, click the Time Block tab. Associate with a visit type for that block of time (e.g. new patient visits from 12 pm to 3 pm on Wednesdays). Learn More
- Custom reminder text (per appointment category) - requires GrowthHub Pro

Front Desk

Learn More

The ChiroSpring virtual Front Desk allows you to visually see today's patients and move them through the check-in to check-out process. See which patients have not completed assigned forms. Manage the treatment note & fee slip process as well as estimate PMR, take payment, reschedule and even send a 5-star review request.

- Create virtual rooms to move patients into. On the Rooms tab toggle "Enable Room on the Front Desk Room Flow".
- Customize appointment category names and colors
- Make sure you are using PMR to provide accurate patient owes estimates

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Online Appointment Requests

Pro • Pro+

Learn More

- These are less general appointment requests and must be reviewed by your staff
- Appointments do not automatically appear on the calendar
- Copy the short link onto your website for 'Appt Requests'
- Do not use this option if you are using Online Scheduling

Online Scheduling

GrowthHub Required

Learn More

- This is true "patient booking" as appointments appear instantly on the calendar
- Copy the short link onto your website for 'Online Scheduling'
- Determine which visit types will be shown online
- Setup Time Blocks if you want to restrict specific appointment categories for a block of time (e.g. New Patients on Wednesdays from 12 pm to 3 pm) Learn More
- Ensure providers that want shown are BOTH set Active on Scheduler and Selected as a Header

Patient Kiosk

Pro • Pro+

Learn More

Your patients can check in for their visit, provide their chief complaint(s), make a payment, and complete requested forms both through the patient app and through the Patient Kiosk. Use any device (computer, Chromebook, iPad) for patients to check into.

- Log into the kiosk daily with your ChiroSpring username and password
- Forms can also be assigned to Appointment Categories so when an appointment is booked the forms are available for the patient to complete
- Completed forms appear in the Treatment Notes section (patient dashboard)

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Email service@chirospring.com for support

Patient Forms

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Learn More

- Determine the text that appears on your website for your Online Patient Forms & HIPAA Form
- Create custom patient forms
- Copy the short link to your website
- Send forms to your patient – Communicator Dashboard/Patient Forms/Action/Create Form Request
- Attach Patient Forms to Visit Categories
- Patients may complete forms at home (sent from the Communicator Dashboard), the Patient Mobile App, your website, or at the Check-in Kiosk.
- Completed forms appear in three places: Treatment Notes Section of Patient's File, Treatment Dashboard and Communicator Dashboard
- Forms requested by appointment will track on Front Desk
- Forms completed by new patients on your website will appear in Form Requests on Home Page and need to be attached to a patient's file

Mobile Apps

ChiroSpring provides two great apps, one for patients (PatientHub 360) and one for your practice (ChiroSpring 360).

PatientHub 360

Download – PatientHub 360 Android - Google Play

Download PatientHub 360 – iOS - App Store

Patients may book an appointment and check in with the PatientHub 360 app.

- Send your patient a direct download link with username and password in a single click. Go to Communicator Dashboard. From there click 'Create Account' in the ChiroSpring Mobile App box. This will send an Email/SMS message to the patient with instructions on how to download and log into the app.

PatientHub 360 App Settings

- Instant Scheduling – On or Off (Requires GrowthHub)
- Set if you want 'all' or 'selected for online booking' for Appointment Categories
- Online booking confirmation – Yes or No
- Mode of notice – SMS or Email

ChiroSpring 360

See your schedule, book an appointment, even take a payment. Providers can also do treatment notes from their phone. Our ChiroSpring 360 mobile app is the perfect companion to ChiroSpring 360.

- Set which treatment notes you want shown in the app – Active on Mobile

Download – App Store - iOS

Download – Play Store - Android

Patient Statements

Learn More

Statements reflect the true patient owes balance. Make sure you are using PMR or adjusting the patient owes amount on each claim to ensure your patient balances are correct. You can send statements via email, SMS or print/mail. If you use ChiroSpring Pay your patients can pay their balances with a payment link.

- ✓ Set your default statement "look" (there are multiple to choose from)
- ✓ Set your return address
- ✓ Add a statement note (e.g., Due within 10 days of receipt)

Choose which statements you want to create from the "Patients with balances" section. Once created choose how you want to send them. Once submitted make sure to select and mark complete.

Email Settings — Patient Communication

- ✓ Set your from email address. This is the email address your patients will see when emails are sent to them from ChiroSpring (so it looks like the emails were sent from you).
- ✓ Replies to this email address can only be read and responded to within your email application

Reports — Our Favorites

- ✓ **Visit Compliance Report** – Easily track claims with missing treatment notes and vice-versa
- ✓ **Activity Report** – We recommend running this at the end of each day as it shows all payment types, write-offs, etc.
- ✓ **Aging Report** – Review patient accounts with any outstanding balances (insurance or patient). Statements can be generated from this report as well.
- ✓ **Recall Report** – Search for patients who have stopped coming into see you. With marketing templates (GrowthHub) you may send mass recall messages to patients.
- ✓ **Patient Listing** – This report is handy if you want to see patient information such as birthday, email, last visit, diagnosis, procedure codes, etc.)
- ✓ **Reminder Report** – Generate daily before shift to see which patients have reminders due or overdue
- ✓ **Practice Statistics Report** – Generate monthly to determine the frequency of services billed
- ✓ **ERA Report** – See specific details for an electronic bank deposit from an insurer
- ✓ **Attorney Report** – Useful for PI practices. Generate as necessary to follow up with attorneys

Custom Templates

Learn More

- ✓ Build templates for treatment notes, patient kiosk or web forms
- ✓ Set order and favorites (check box) under Treatment Note Settings
- ✓ Treatment notes may use SOAP Macros if the section name is Subjective, Objective, Assessment, Plan or Evaluation

Custom SOAP Macros

Learn More

- ✓ Fully loaded with our SOAP Macros
- ✓ You may edit our Macros, or create your own
- ✓ Once macros are created, add them to your custom treatment notes (header must be Subjective, Objective, Assessment, Plan or Evaluation for the Macro icon to appear in the treatment note editor)

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Add-Ons

Memberships

Learn More

Memberships are a great way to run a subscription based (cash) practice.

- ✓ Create your membership types (e.g. Gold, Bronze, Silver)

  Add products and/or procedures to your membership types

  Set units and price

  Add custom agreement text
- ✓ Add a membership link to your website (make sure you are enrolled with ChiroSpring Pay to capture patient payment
- ✓ Add a membership to your patient from the Treatment Dashboard
- ✓ View memberships on your home screen and approve or reject them
- ✓ Track memberships with the Memberships Report

Claims

Learn More

- ✓ Claims are created when you save a fee slip
- ✓ Review claims in Pending Claims. Correct errors.
- ✓ Remember, claims will auto ditto (SALT) on the next visit. It is important that you clean up the first claim (no errors and correct diagnosis pointing) before you see the patient for their next visit.
- ✓ Generate your EDI (and manually upload to your clearinghouse). Or, send your claims to ChiroSpring (when using our clearinghouse).

Service Center

Learn More

Assign service requests to our team through our service center. Charges may apply depending on the request and your subscription. Most service center requests are included at no cost for our billing service customers.

GrowthHub

Learn More • Subscribe

GrowthHub adds an expanded set of features designed to grow your practice and improve patient engagement. With fewer missed appointments, faster patient payments, reactivated payments and improved Google Ranking the feature pays for itself. GrowthHub features include enhanced appointment reminders, confirmation messages, birthday reminders, online scheduling, patient reviews, patient recall, broadcast messenger, ChiroSpring SEO and more.

GrowthHub users may customize the following:

- ✓ 5-Star review request text & automation
- ✓ Automated Birthday messages
- ✓ Reminder message & custom cadence
- ✓ Online scheduler message text
- ✓ Appointment confirmation message text
- ✓ Appointment category reminder text
- ✓ Customize email templates
- ✓ Customize SMS templates
- ✓ Add Online Scheduler URL to website

GrowthHub Basic

- ✓ 2,000 Text Messages (inbound/outbound)

  Used for 2-way text communication
- ✓ Patient Reviews
- ✓ Online Scheduling

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Add-Ons

GrowthHub Pro

Includes all the features in GrowthHub Basic plus:

- ✓ 5,000 Text Messages (inbound/outbound)
  Used for 2-way text communication
  Used for broadcast messaging
- ✓ Broadcast Messenger
- ✓ Patient Recall
- ✓ Birthday Reminders
- ✓ Marketing Templates (Email and SMS)
- ✓ Enhanced Reminders
- ✓ Lead Management
- ✓ Patient Loyalty Program
- ✓ Patient Relationship Manager
- ✓ ChiroSpring SEO – Setup Business Profile

ChiroSpring Pay

Learn More

Sign up for ChiroSpring Pay

ChiroSpring Pay is our fully integrated payments platform. It's AMAZING!

- ✓ Fast and easy payments for you and your patients
- ✓ Store cards on file (securely using tokenization)
- ✓ Create scheduled/recurring payments (works great with memberships)
- ✓ Send SMS payment links to your patients – get paid faster
- ✓ Patients can see their balance and make payment online at the kiosk
- ✓ Works with terminal or manual entry in ChiroSpring

Pricing

- ✓ Card Present 2.6% + 10 cents
- ✓ Card Not Present 2.9% + 30 cents

We save customers on average 40% vs their previous processor.

Calculate Your Savings

Billing Services

Choose either Proactive or Reactive billing services.

Proactive -$4/claim

Our billing team proactively finds and corrects errors on your claims and resubmits to ensure you are getting paid. If patterns are identified, we work with your team to correct decreasing first time submission denials. The result is faster time to reimbursement, increased percentage of paid claims and lower insurance AR. This service is only available with ChiroSpring Pro or Pro+.

Reactive - $2/claim

You hand pick the claims you want our team to review. We then correct and resubmit for you. Our reactive service does not provide consultative guidance. If patterns on rejections exist, you would need to identify and correct. This service is only available with ChiroSpring Pro or Pro+.

ChiroSpring Clearinghouse

Pro • Pro+

Using our ChiroSpring integrated clearinghouse adds major efficiency to your practice. Claims can be submitted in a single click. ERAs are posted automatically for you (by us). With a non-integrated clearinghouse, claims will need to be manually uploaded and remittances manually posted.

- ✓ If you are using ChiroSpring's clearinghouse, ensure your workbook is completed as quickly as possible
- ✓ You may still create claims but cannot send them until ChiroSpring clearinghouse setup is complete
- ✓ If you are using a third-party clearinghouse, you may generate an EDI or CMS-1500 claim at any time

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