



Systems Training Guide

ChiroPatientsMatter.ca



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What is ChiroPatientsMatter?

ChiroPatientsMatter is an online tool which automatically collects patient-recorded outcome measures and patient satisfaction data by email from the patients whose details are entered onto the system.

It collates the data and provides confidential feedback on you and your clinic's performance.

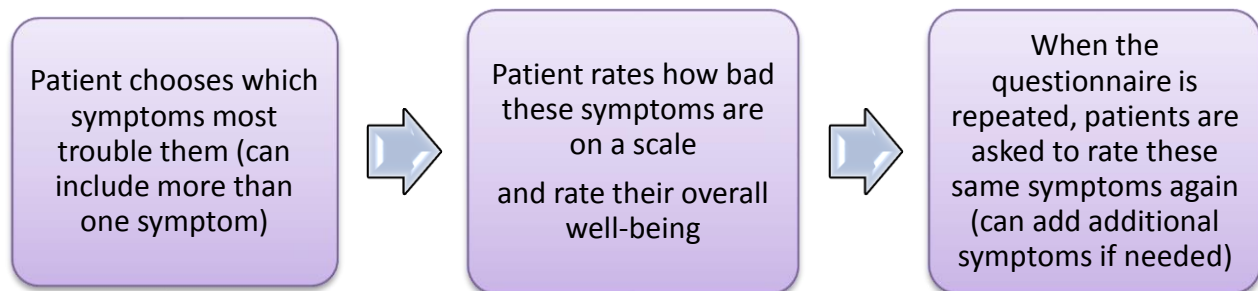
It will also help you understand how well those under your care are doing and provides a powerful tool to promote your organization/practice to others.

ChiroPatientsMatter routinely and automatically emails your chosen outcome forms and patient satisfaction questionnaires to the patients you register on the system, at the initial assessment and 14, 20, 30, and 90 days after starting care.

Type of Questionnaires Used Within the Platform

1. MYMOP (Measure Yourself Medical Outcome Profile)

- MYMOP aims to measure the outcomes that the patient considers most important to them.
- It is problem-specific but includes general well-being.
- It is applicable to all patients who present with symptoms, and these symptoms can be physical, emotional, or social.
- The questionnaire is used within the initial assessment and the 14-, 30-, and 90-day follow-ups.
- A combination of scores for each symptom and overall well-being are used to calculate the patient's MYMOP score. Changes in this score are used as a marker for improvement, or also in presenting symptoms and well-being.
- MYMOP's advantages are that it is entirely patient-driven, highly personal, and does not take long to complete.



2. CPAQ (Chiropractic Patient Assessment Questionnaire)

- Collects satisfaction results from the patient's viewpoint.
- The survey was adapted from an existing validated tool used widely by GPs known as GPAQ and has been renamed as "CPAQ" for chiropractic patients.
- Questions include both scaled- and open-text-based questions.
- The questionnaire can only be completed for patients with emails associated with their accounts.
- Survey is provided to patients 20 days after their initial appointment.

The anonymous survey covers a range of areas including:

- Reception (e.g., How you were treated by the receptionist?)
- Ease of making an initial appointment (e.g., How quickly did you get to see a chiropractor?)
- Ability to make an appointment at a convenient time (e.g., How do you rate the hours that your clinic is open for appointments?)
- Time waiting in the clinic for appointments (e.g., How long do you usually have to wait at the clinic for your appointment to begin?)
- Ease of contacting the clinic by phone (e.g., Are you able to get through to the clinic on the phone or speak with a chiropractor if you have a question or need advice?)
- Consultation/treatment factors (e.g., After seeing the chiropractor, were you able to understand your problems? Cope with your problems? Keep yourself healthy?)

How the System Defines Users

Before setting up your practice on *ChiroPatientsMatter.ca*, it is important to understand how the system defines the various users and other aspects of your account. These definitions are as follows:

Organization = A practice or group of practices working together, usually under common ownership.

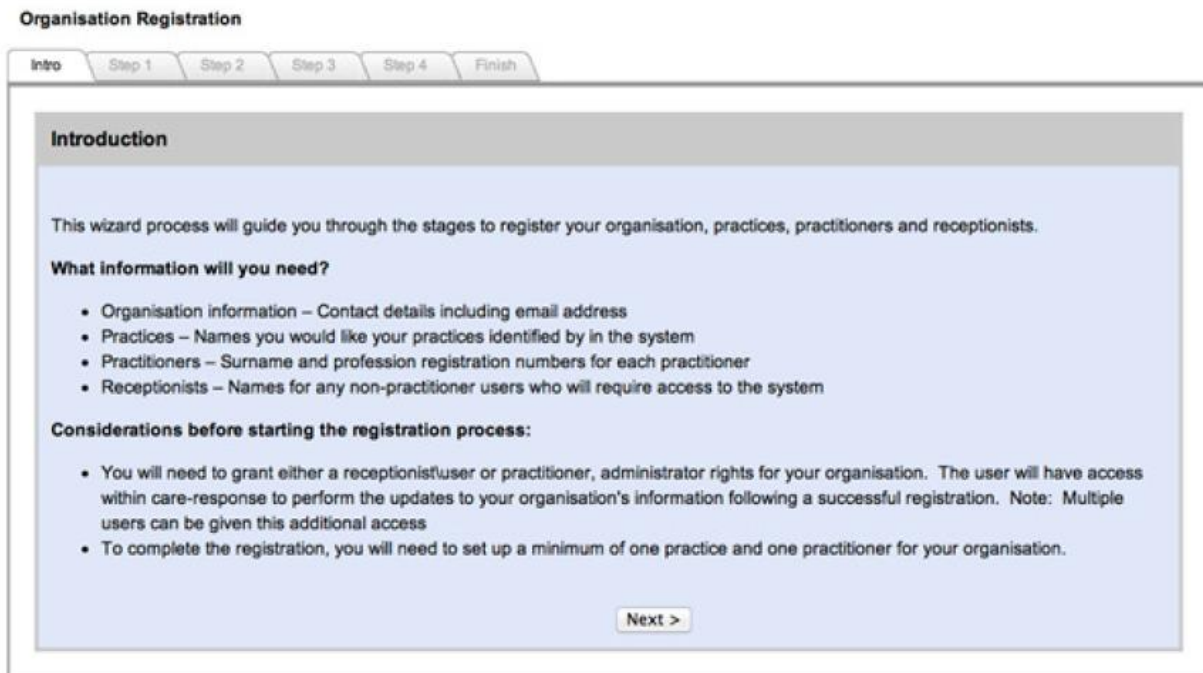
Practice = A single clinic within an organization. Many organizations will have only one practice.

Receptionist/Office Administrator = A user who does not see patients clinically. Receptionists may access information for individual patients but cannot see any summary reports for practitioners.

Practitioner = A practitioner who sees patients clinically and is able to see summary reports for themselves and their organization. A practitioner is able to see summary reports for themselves but not for any other individual practitioner (unless they are the organization administrator).

Organization Administrator = This title can be set for a receptionist or practitioner allowing them to have higher-level access. Organization administrators are able to set up and change practices, receptionists, and practitioners. Organization administrators are able to see summaries of outcome reports for all practitioners in the organization.

Registering on ChiroPatientsMatter with the Set-up Wizard



To set-up an account you will need the name of the organization, each individual practice under the organization (if more than one), and the name and email addresses of each practitioner and receptionist.

Note: If you have the same brand name for each organization and practice, use the location to differentiate them (for example an organization called “ChiroCare” may have practices such as “ChiroCare-Toronto,” “ChiroCare-Mississauga,” etc.).

It is important that administrators of ChiroPatientsMatter confirm that emails being sent to them have arrived safely. Once you have completed the final step of the set-up wizard, you will receive an email to activate your organization. The link must be clicked and activated in order for your organization to be fully set-up, i.e., enable all log-in usernames and passwords.

When setting up a new practice, there are a few things to look out for.

Organisation Data Setup

The screenshot displays the 'Organisation Data Setup' interface. The left panel, titled 'Editing Details For ChiroTest-Toronto', contains the following fields and options:

- Practice Name: ChiroTest-Toronto
- Country: Canada (en)
- Active:
- Outcome Question Set: MYMOP
- Capture Medical History: Yes No
- Allow Completion Date Updates: Yes No
- Show Consent Options To Patient: Yes No
- Address Line 1: 186 Spadina Ave, Toronto
- Address Line 2: (empty)
- Address Line 3: (empty)
- Address Line 4: (empty)
- Address Line 5: (empty)
- Province: Ontario
- Postal Code: L3S3P9

Below the address fields, there is a note: "If you have more than one practice in your organisation, each should be given a different name to identify them. This might be your organisation name plus the location of the practice. e.g. The Back Clinic - Southampton". At the bottom of the left panel are 'Update Practice' and 'Cancel Edit' buttons.

The right panel, titled 'Your Organisation's Practices', shows a table with the following data:

Practice Name	Active
ChiroTest-Toronto	<input checked="" type="checkbox"/>

There is an 'Edit' button next to the 'ChiroTest-Toronto' entry.

This screen displays the information for setting up a practice. Please ensure that “Capture Medical History” and “Allow Completion Date Updates” are both marked as “yes.”

Note: Allow completion date updates means that when a patient completes a form, the practitioner will be notified by email of this so that they can view their results and follow-up if necessary. Updates received by practitioners through email do not provide confidential information about the patient. They provide a summary of the results and allow you to sign into the platform for further investigation.

After this is complete, you will save the details and it will show up on the right side of the Practice panel. From here, an organization administrator can edit the details of the current practice(s) or add practice(s) as needed. You will now be able to move to the next step of adding practitioners and receptionists to your practice.

Home | WorkList | Patient | Reports | Admin | My Settings | Help

Organisation Data Setup

Organisation | Practices | Practitioners | Receptionists

Add new practitioner

Before adding a new practitioner we would like to check them against those we have records for. Enter the surname and registration number for your practitioner and click the magnifying glass to search.

Surname:

Registration Number: 🔍

When a practitioner is first signing up, they will be asked to put in a registration number. This registration number will be your **CCA Membership Number**. The importance of this number is that it identifies any practitioner that works at more than one organization. If a practitioner were to sign up again for another organization, it inputs in their existing registration number. The platform will see that they already exist in the system and link their log-in information between both organizations. This way the practitioner will be able to see the collated results for all their patients across all their organizations & practices. Ultimately, it will allow the practitioner to use the system with one log-in for all the organizations of which they are a part.

Note: When entering details for different practitioners, it is important to remember that all practitioners who are not organization administrators will be shown as “Active” rather than “Organisation Admin” (as seen below). This also relates to receptionists.

Organisation Data Setup

Organisation Practices Practitioners Receptionists

Editing Details For Dr Dillon Thomas

Title:

First Name:

Surname:

Full Name Displayed:

Email Address:

Professions

Label: Reg No:

[+ Add another profession](#)

System Access

These are the details the practitioner will use when logging into ChiroPatientsMatter. Both user/pass should be at least six characters long.

User Name:

Password:

Org admin access enables the practitioner to add or change other users in your organisation

Organisation Admin:

Active:

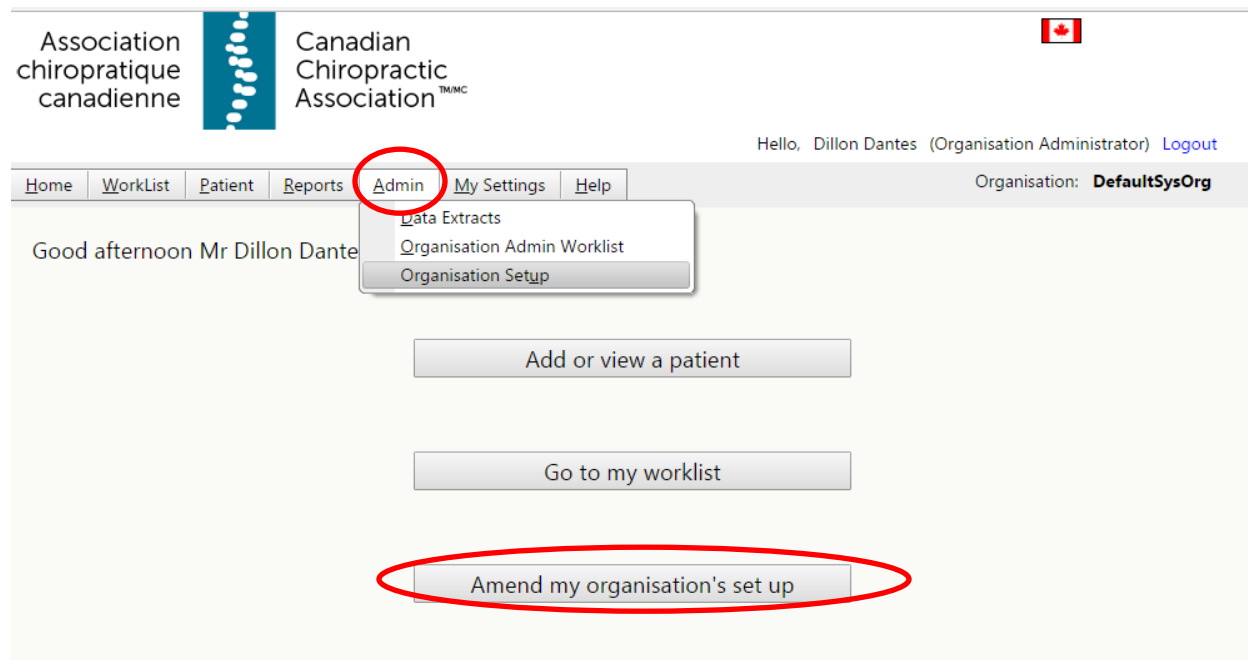
Practice Assignment

Which practices does this practitioner work at?

Practitioners Related To Your Organisation

	Practitioner Name	Active
<input type="button" value="Edit"/>	Dr Dillon Thomas	<input checked="" type="checkbox"/> <input type="button" value="X"/>
<input type="button" value="Edit"/>	Dr. Thomas Palmer	<input checked="" type="checkbox"/> <input type="button" value="X"/>

Adding Additional Receptionists or Practitioners to your Practice



Once you are set up and ready to get started on the platform, you might have other chiropractors or receptionists at your practice interested in joining. This is a really easy process!

As seen in the above image, this is the main home screen view for an organization administrator. Please note that only people who have the organization administrator status can access and change the information for the organization.

There are two ways in which you will be able to access your organization's information to either add another practitioner/receptionist or change an organization/practice's details. You can either click on the big button at the bottom of the screen ("Amend my organisation's set up") or hover over the Admin tab and click on "Organisation Setup."



Organisation Data Setup

[Organisation](#) [Practices](#) [Practitioners](#) [Receptionists](#)

Organisation Details

Organisation Name:

Phone:

Primary Email:

Primary Contact Name:

Fax:

Secondary Email:

Secondary Contact Name:

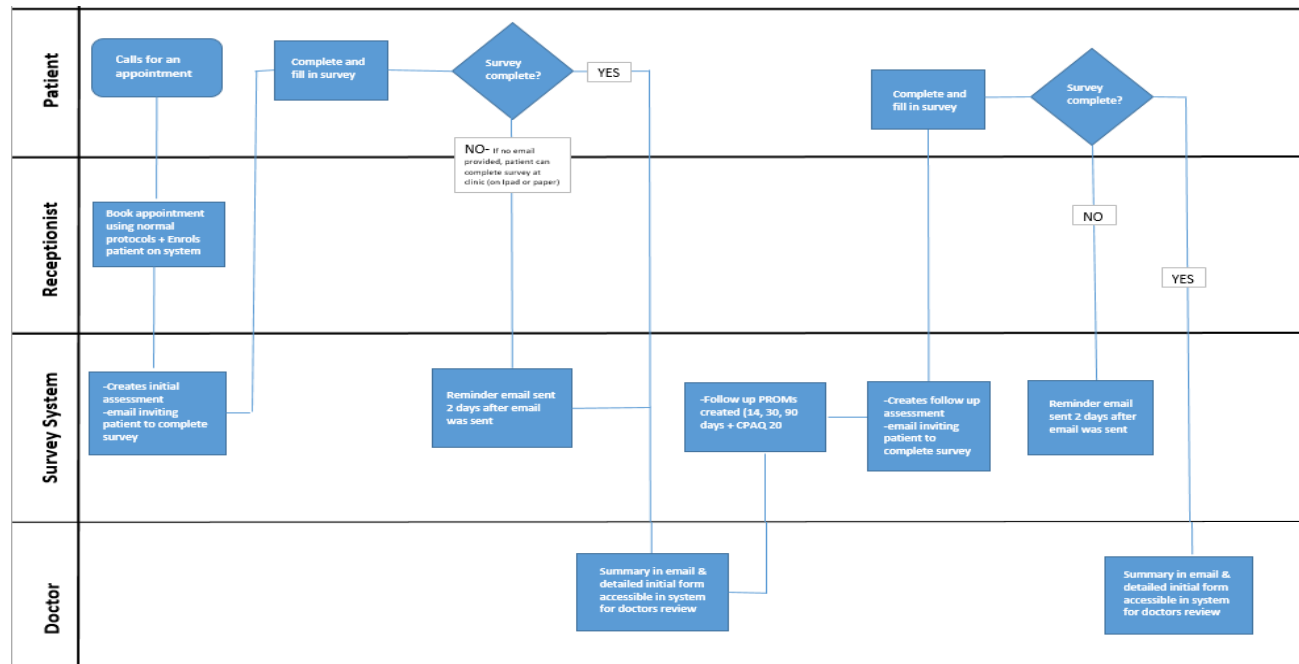
Your Company Website URL:

Your Company Privacy Policy URL:

If you include your website details, this will be provided to patients from your clinic to help them find out more about you and your services.

This is the screen that will appear after clicking on one of the two methods of changing the organization's information. From here, you will be able to modify information on the organization, practices, practitioners, and receptionists.

Process Flow through the System





This swim lane flowchart helps visualize how the system interacts with all parties involved in the process. As you can see, the system takes on most of the burden and ensures only simple tasks are required by all other stakeholders. The current flow chart shown above visualizes the most ideal scenario—when the patient provides their email to complete assessments at home, rather than manually at the clinic.

Below, we will highlight the tasks for which each party is responsible:

- **Patient:** Filling out questionnaires through the use of their email (worst-case scenario is at the clinic)
- **Receptionist:** Creating a patient profile in the system, sending out the initial questionnaire, ensuring the doctor has the required information when needed (e.g., for printing out assessments), and providing patient with questionnaires if they want to fill out information at the clinic (less ideal scenario).
- **Doctor:** Reviewing patient results as they come in and understanding clinic and personal outcomes/performance.
- **System:** Completes all the administrative duties and daily activities (e.g., sending reminder emails to patients about questionnaires, generating each questionnaire autonomously when required).

Navigating as a Receptionist

Receptionist Home Screen

Association chiropratique canadienne  Canadian Chiropractic Association 

Hello, Amanda Bins (Receptionist) [Logout](#)

[Home](#) [WorkList](#) [Patient](#) [My Settings](#) [Help](#) Organisation: **DefaultSysOrg**

Good afternoon Amanda Bins, what do you want to do?

[Add or view a patient](#)

[Go to my worklist](#)

This is how the home screen for a receptionist who does not have organization administrator status will typically look like. If they are set up as an organization administrator, they will have additional icons to change organizational information and view reports. A practitioner can also have no organization administrator access and their screen will look similar to this screen.

It is important that receptionists receive consent from the patient to input their data into the system. Once consent is given, there is an additional step we have added to safeguard this platform:

- When a patient receives an assessment, they will have to click a checkbox to verify their consent to provide their information and complete this assessment online.



How to Add or View a Patient

The screenshot shows the user interface of the Canadian Chiropractic Association software. At the top left, the logo for 'Association chiropratique canadienne' and 'Canadian Chiropractic Association' is displayed. A Canadian flag is in the top right. The user is logged in as 'Amanda Bins (Receptionist)'. A navigation menu includes 'Home', 'WorkLis', 'Patient', 'My Settings', and 'Help'. The 'Patient' tab is selected and circled in red, with a dropdown menu showing 'Search\Create'. Below the navigation, a message reads 'Good afternoon Amanda Bins, what do you want to do?'. Two buttons are visible: 'Add or view a patient' (circled in red) and 'Go to my worklist'.

There are two ways to add or view a patient:

1. Click on the big button that says “Add or view a patient”
2. Put the cursor on the Patient tab and click on “Search\Create”

Viewing a Patient

Association chiropratique canadienne  Canadian Chiropractic Association 

Hello, Dillon Thomas (Practitioner) [Logout](#)

Home [WorkList](#) [Patient](#) [Reports](#) [My Settings](#) [Help](#) Organisation: **ChiroTest**

Patient Search\Creation

System Ref Id: Client File No:

Title

First Name *

Last Name *

Date Of Birth *

Address Line 1 * Postal Code *

Address Line 2

Address Line 3

City

Province

Country

Email *

Gender Male Female Unknown

Mobile No. Other No.

Default Practice

* New Patient Mandatory Fields
* New Patient Mandatory Fields - Address or Email
 Patient Search Fields

To find an existing patient, completely type their last name into the appropriate text box until the patient is displayed. You will have to type in the patient's full last name, as the data is encrypted. By hovering over their name and double-clicking on the correct individual, it will allow you to see more in-depth results for that particular patient (more detailed information is explained later in this guide).

Adding a New Patient



Patient Search\Creation

System Ref Id: Client File No:

Title

First Name *

Last Name *

Date Of Birth *

Address Line 1 * Postal Code *

Email *

Gender Male Female Unknown

Mobile No. Other No.

Default Practice

* New Patient Mandatory Fields

* New Patient Mandatory Fields - Address or Email

Patient Search Fields

System Ref Id	First Name	Last Name	Date Of Birth	Address Line 1	Postal Code	Client File No
No records to display.						

Fill out all the required information to the best of your abilities. At a bare minimum, it is recommended that you include their full name, date of birth, phone number, and email. Once all the necessary information is input into the correct fields, click on the “Create Patient” button (as shown at the bottom of the image above).

Note: Having the patient’s email address in their profile will make the process flow much smoother for the patient, practitioner, and receptionist.

Patient Detail - Anthony Graham (Id: 10010)

System Ref Id: Client File No:

Title

First Name

Last Name

Date Of Birth

Address Line 1 Postal Code

Address Line 2

Address Line 3

Address Line 4

City

Province

Country

Email

Gender Male Female Unknown

Mobile No. Other No.

Default Practice

No Email Circulars:

Email Delivery Problems:

Created Date:

Created By:

Last Amended Date:

Last Amended By:

Patient Created Successfully

Presentation History

Once you click on the “Create Patient” button, a box will appear to allow you to create a new presentation for that patient (as shown in the image above). Within the system, creating a new presentation means that the patient is coming in with a new problem. You can also edit details from this screen to add in more information or change existing details for the patient.

Creating a New Presentation

Association chiropratique canadienne Canadian Chiropractic Association 

Hello, Amanda Bins (Receptionist) [Logout](#)

[Home](#) [WorkList](#) [Patient](#) [My Settings](#) [Help](#) Organisation: **DefaultSysOrg**

Presentation / Referral

Quick Links: [Patient Record](#) [GP Letter](#)

Presentation Header
Default Practice:
New patient to this clinic:
 Required Fields:

Once you have clicked on “Create a New Presentation,” the screen will change to show you additional details that need to be filled-out. After filling in the required information, click on the floppy disk “save” icon to save the information.

Association chiropratique canadienne Canadian Chiropractic Association 

Hello, Amanda Bins (Receptionist) [Logout](#)

[Home](#) [WorkList](#) [Patient](#) [My Settings](#) [Help](#) Organisation: **DefaultSysOrg**

Presentation - Anthony Graham (Id: 10010)



Quick Links: [Patient Record](#) [GP Letter](#)

Presentation Header
Default Practice:
New patient to this clinic:
Managing Practitioner:
 Save successful Required Fields:


Appointments
 [Create First Appointment](#)

You will have to fill in all fields and save the data once complete. The Appointments tab will now be available for you to create the first appointment for your patient.

Appointments

appt date 
Practice
Practitioner
Delete 

First Appointment Updates
 Seen Practitioner Before:

 Save successful.....Generating Initial Assessment (Your screen will refresh automatically)

In the Appointments area, set the practice, practitioner, and date of the visit. Again, if the patient has seen the practitioner before, highlight the check box. Now, you can click on the floppy disc to save the details. If successful, it will lead you to the next step!

The presentation and initial assessment were created successfully

An email address for the patient has been found. Please choose whether you would like the system to email the assessment to the patient, or whether you want to view the initial assessment now. Viewing the initial assessment enables you to either print off in preparation for the customer to complete at the practice or if the customer is present, set the assessment to be completed online now.

If all is well, you will see a confirmation box pop up with three buttons to choose from: “View Assessment,” “Allow System to Email Assessment,” and “Go To Worklist.”

You now have three options:

Allow System to Email Assessment: If the patient has provided their email address, you can click this button to send them the initial assessment. This should ideally be the most frequently used option.

Go To WorkList: The button “Go To Worklist” takes you back to your starting page. If the patient is to complete the assessment in-person within the practice, use this option. You can call-up the assessment to be completed later, which then can be:

- Viewed and completed online using an iPad, tablet, or computer (set the screen to “Set for Patient Input” mode [see page 27 for screenshot])
- Printed out and completed manually (input back into the system manually)

View Assessment: You may use this if you want to complete the assessment right now on your screen, possibly because the patient is at the clinic. This is rarely used.

Assessment can be:

- Viewed and completed online using an iPad, tablet, or computer (set the screen to “Set for Patient Input” mode [see page 27 for screenshot])
- Printed out and completed manually (input back into the system manually)

Note: When the patient receives the email with the assessment, there will be a link for them to click on in order to get to the questionnaire. Upon opening the questionnaire, the patient will have answer a security question (their date of birth) and provide their consent to move forward.

Go To WorkList

The screenshot displays the user interface for the Canadian Chiropractic Association. At the top left, the logo for 'Association chiropratique canadienne' and 'Canadian Chiropractic Association' is visible, along with a Canadian flag icon. The user is logged in as 'Amanda Bins (Receptionist)'. A navigation menu at the top includes 'Home', 'WorkList', 'Patient', 'My Settings', and 'Help'. The 'WorkList' tab is highlighted with a red circle. Below the navigation bar, a message reads 'Good afternoon Amanda Bins, what do you want to do?'. Two buttons are present: 'Add or view a patient' and 'Go to my worklist'. The 'Go to my worklist' button is circled in red.

You can get to the receptionist worklist section by either clicking on the big button labelled “Go to my worklist” or hovering and clicking on the Worklist tab. This section will give you information about the status of any patient activity that may need your attention.

Practice: Chiro

Worklist - Receptionist

Patient Email Tasks

- No emails to show

Show email items marked as hidden

Assessments Not Completed

Patient	Assessment	Email	Action	First Name	Last Name	Email	Tel No	Assess Type	First Appoint. Date	Last Emailed Date	Assess. Created Date
View	View	ReSend	Hide	Jonathan	Lefty	dillon@chiropractic.ca	4167167834	Initial	26-Jan-2017	12-Jan-2017 19:07:50	12-Jan-2017 19:04:37

Show assessments that were created in the last 14 days only
 Show initial assessments only
 Show assessments that are marked as hidden

Assessments Completed, Not Printed

Patient	Assessment	First Name	Last Name	Assessment Type	First Appointment Date	Completed Date	Completed Via Email
View	View	Brittany	Wu	Initial	15-Oct-2016	02-May-2016 00:00:00	<input type="checkbox"/>

⏪ ⏩ 1 2 ⏪ ⏩ Page Size: 6 7 items in 2 pages

Show initial assessments only

The three sections in the receptionist's view of the WorkList screen are described more fully below:

- **Patient Email Tasks:** When questionnaires are emailed to patients, sometimes patients might reply back to the automated message. This message will go to the practitioner who can then forward the email to the receptionist if they feel the receptionist can handle the requests from the patient.
- **Assessments Not Completed:** This section is reserved for patients who have not yet returned assessments. It is helpful to keep an eye out on this section to see if a reminder is needed. This list contains a contact number for the patient and the ability to re-send the assessment. If patients are going to complete the form in reception before their appointment, this list can serve as a reminder to have them complete the assessment when they come in. This can be done either by completing the forms on paper and having the receptionist enter the responses into the system, or using a computer/iPad at the clinic to complete the assessment at the clinic (which can be done by clicking the "View" button under the Assessment column).
 - **Note:** If your practice uses an iPad or computer for patients to complete the form, there is a button called "Set for Patient Input" (see page 27 for screenshot), which allows you to lock the system to display the assessment only.

- **Assessments Completed, Not Printed:** This section lists returned assessments that are not yet printed. The initial assessment contains useful information when a practitioner sees a patient for the first time. Clicking the “View” button in the Assessment column calls up the summary of the questionnaire that could be printed for the practitioner. Also, additional questionnaires that are completed can be printed.

Note: If there is more than one practice within your organization you are a part of there will be a separate WorkList for each practice. You can change the one you are looking at by selecting other practices from the practice pull-down list located at the top–centre of the window.

Providing Questionnaires when a Patient Arrives at the Clinic

As discussed earlier in the receptionist profile's WorkList (below), you can bring up a patient's assessment. Within the Assessments Not Completed section, you can see the patients who have not completed their questionnaires and it gives you the ability to view the assessment and patient details.

Home | **WorkList** | Patient | My Settings | Help | Organisation: DefaultSysOrg

Worklist - Receptionist Practice: P1

Assessments Not Completed

Patient	Assessment	Email	Action	First Name	Last Name	Email	Tel No	Assess Type	First Appoint. Date	Last Emailed Date	Assess. Created Date
View	View	ReSend	Hide	Islay	King	steve@planetking.com		Initial	14-Mar-2017	15-Mar-2017 22:32:50	13-Mar-2017 22:24:34
View	View	ReSend	Hide	Tim	Woods	dillon@chiropractic.ca		Initial	14-Mar-2017	16-Mar-2017 14:47:56	14-Mar-2017 14:37:40
View	View	ReSend	Hide	Thomas	Fernandez	dillon@chiropractic.ca	4167167834	Initial	22-Mar-2017	21-Mar-2017 14:27:36	14-Mar-2017 19:12:57
View	View	ReSend	Hide	Alison	Thompson	dillon@chiropractic.ca	4167167834	Initial	15-Nov-2016	17-Mar-2017 15:02:56	15-Mar-2017 14:55:40
View	View	ReSend	Hide	Sally	Field	jonathanfield@me.com		Initial	17-Mar-2017	20-Mar-2017 21:42:40	18-Mar-2017 06:31:16
View	View	ReSend	Hide	Emily	Jacobs	dillon@chiropractic.ca	4167167834	Initial	20-Mar-2017	22-Mar-2017 15:37:42	20-Mar-2017 15:32:08

Page Size: 6 | 7 items on 2 page

Show assessments that were created in the last 14 days only
 Show initial assessments only
 Show assessments that are marked as hidden

Clicking on the “View” button for the Assessment column will bring up the assessment. If the patient wants to fill out the assessment manually, you can print the assessment.

From here you will be able to print out the assessment in the same way you would from any internet browser—often by choosing print from the file menu.

Another way to view the assessments is to search for the patient in the Presentation History section (image below). You will see all the assessments that were sent to the patient. In the example below, you can see the initial assessment was emailed to the patient but it was never completed.

Patient Detail - Anthony Graham (Id: 10010)

System Ref Id: Client File No:

Title

First Name

Last Name

Date Of Birth

Address Line 1 Postal Code

Address Line 2

Address Line 3

Address Line 4

City

Province

Country

Email

Gender Male Female Unknown

Mobile No. Other No.

Default Practice

No Email Circulars:

Email Delivery Problems:

Created Date:

Created By:

Last Amended Date:

Last Amended By:

Presentation History

Action	First Appt Date	Practice	Practitioner	Status
<input type="button" value="View"/>	24-Mar-2017	P1	Mr Dillon Dantes	INITIAL ASSESS INIT

Assessments								
Created Date	Type	Completed Via Email	Emailed	Printed	Emailed Date	Printed Date	Completed Date	
24-Mar-2017 15:39:24	Initial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24-Mar-2017 15:42:48			<input type="button" value="View"/>

Clicking on the green arrow (indicated on the image above) will bring up the assessment that you are interested in viewing.

Either method of viewing an assessment will lead to the same result.

Home WorkList Patient My Settings Help Organisation: DefaultSysOrg

Patient (GRAHAM) > Presentation (First Appt Dt -24-Mar-2017)

Initial Assessment

Save Answers

Email To Patient Mark As Printed **Set For Patient Input**

Assessment Completion Status: **Not Completed**

Set Completion Date:

Name: **Anthony Graham**

Date of Birth: **04-Apr-1992**

Client File No:

Patient No: **10010**

Organisation: **DefaultSysOrg**

Practice: **P1**

Practitioner: **Mr Dillon Dantes**

Gender: Male Female

Select your areas of pain using the 'show body image' button (Up to 8 can be entered):

Information about your condition

How long has THIS PRESENT episode of your complaint lasted?

- More than 10 years
- 6-10 years
- 3-5 years
- 1-2 years
- 7-12 months
- 3-6 months

If the patient is going to fill in the questionnaire on an electronic device that the clinic provides, you can set the assessment to “Set for Patient Input” (see screenshot above). The platform will automatically format the form on the device and safely lock the system to prevent other patient’s details and information from being seen. You can also email this assessment to the patient if they change their mind to complete the assessment at home.

Printing Completed Assessments

When assessments are completed, you will be able to view them in the WorkList area under Assessments Completed, Not Printed.

Assessments Completed, Not Printed							
Patient	Assessment	First Name	Last Name	Assessment Type	First Appointment Date	Completed Date	Completed Via Email
View	View	Jack	Field	Initial	18-Mar-2017	17-Mar-2017 00:00:00	<input type="checkbox"/>
View	View	Dillon	Dantas	Initial	23-Feb-2017	14-Mar-2017 14:15:05	<input checked="" type="checkbox"/>
View	View	Steve	King	Initial	08-Mar-2017	09-Mar-2017 18:27:58	<input checked="" type="checkbox"/>
View	View	Steve	King	Initial	07-Dec-2016	15-Dec-2016 00:00:00	<input checked="" type="checkbox"/>

Show initial assessments only

From here, you can click on the “View” button under the Assessment column, which will bring up the assessment.

For all initial assessments, you can print out an initial assessment summary or view the whole assessment (the “View Full Assessment” button is circled in red below) and print it out from there. All other assessments will open the whole assessment, from which you will be able to print them for your patient or for the practitioner.

Home WorkList Patient My Settings Help Organisation: DefaultSysOrg

Patient (DANTAS) > Presentation (First Appt Dt -23-Feb-2017)

Initial Assessment Summary

[View Full Assessment](#) [Mark As Printed](#)

Assessment Print Status: **Not Printed**

Today's Date: 24-Mar-2017

Name: **Dillon Dantas** DOB: 04-Apr-1992 File no:
First appt: 23-Feb-2017 with Mr Dillon Dantas

Assessment Completion Date: 14-Mar-2017 14:15:05

Pain Locations:
front of left shoulder

Duration (weeks): 13
Previous episode: **No** More than 30 days pain in last year: **Yes**

Medical history screen (has had problems with):
Circulation/heart: **No** Joint/arthritis: **No**
Respiratory: **No** Digestion: **No**
Urinary: **No** Neurological: **No**
Psychological: **No** Allergies: **Yes**
Tumor: **No** Diabetes: **Yes**
Medication: **No** Surgery: **No**
Smoker: **No** Alcohol: **Yes**
Trauma: **No**

Free Text Information:
No additional information entered

Creating Questionnaires

Some patients will not want to provide their email address for this application. All the assessments will still be accessible for them to complete (except the CPAQ), but the assessments will need to be created manually. After searching for a patient in the Presentation History section, you can click on the “View” button (shown below in red).

Hello, Amanda Bins (Receptionist) [Logout](#)
Organisation: **DefaultSysOrg**

[Home](#) [WorkList](#) [Patient](#) [My Settings](#) [Help](#)

Patient Detail - Anthony Graham (Id: 10010)

System Ref Id: Client File No:

Title:

First Name:

Last Name:

Date Of Birth:

Address Line 1: Postal Code:

Address Line 2:

Address Line 3:

Address Line 4:

City:

Province:

Country:

Email:

Gender: Male Female Unknown

Mobile No: Other No:

Default Practice:

No Email Circulars:

Email Delivery Problems:

Created Date:
Created By:
Last Amended Date:
Last Amended By:

Presentation History

Action	First Appt Date	Practice	Practitioner	Status
<input type="button" value="View"/>	24-Mar-2017	P1	Mr Dillon Dantes	INITIAL ASSESS INIT

Assessments								
	Created Date	Type	Completed Via Email	Emailed	Printed	Emailed Date	Printed Date	Completed Date
	24-Mar-2017 15:39:24	Initial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24-Mar-2017 15:42:48		

This will open up a detailed presentation for that particular patient. If you scroll to the bottom of the page, there is a section called Assessments. From here you can choose from:

1. Initial assessment (before the first appointment)
2. Outcome (14- and 90-day assessment)
3. Outcome Satisfaction (30-day assessment)
4. Satisfaction (quick satisfaction question about the overall clinic)

Once you choose the assessment you require, you can create the selected assessment. It will automatically open to the assessment of choice and you can either set it up for patient input, print out the assessment for manual input, or email it directly to the patient.

Note: Currently, the CPAQ assessment cannot be manually produced since it is an anonymous questionnaire.

Assessments

Type	Appointment Date	Completed Date	Days To First	Last Printed By	Last Print Date	Last Email Date	Has Been Printed	Has Been Emailed	Was Completed By Email
Initial			0			12-Jan-2017 19:07:50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Initial 19:04:37


Create Selected Assessment

Stopping an Assessment

Presentation History

Action	First Appt Date	Practice	Practitioner	Status
View	24-Mar-2017	P1	Mr Dillon Dantes	INITIAL ASSESS INIT

Assessments

Created Date	Type	Completed Via Email	Emailed	Printed	Emailed Date	Printed Date	Completed Date
 24-Mar-2017 15:39:24	Initial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24-Mar-2017 15:42:48		

[Create New Presentation](#)

After searching for a particular patient, click on the “View” button and a detailed presentation for that patient will appear (as seen below).

Home | [WorkList](#) | [Patient](#) | [My Settings](#) | [Help](#) Organisation: **DefaultSysOrg**

Presentation - Anthony Graham (Id: 10010) Quick Links: [Patient Record](#) [GP Letter](#)


Presentation Header **Status:** INITIAL ASSESS INIT

Default Practice:
New patient to this clinic:
Managing Practitioner:

Care Detail

Diagnosis:
Diagnosis Detail:
Outcome Format:
Email Delivery Status:
Stop Assessment:

Appointments

appt date	Practice	Practitioner	Delete
24-Mar-2017	<input type="text" value="P1"/>	<input type="text" value="Mr Dillon Dantes"/>	

Marking the Stop Assessment checkbox will ensure that no more assessments get sent to that patient.

This can be done by the doctor or receptionist if the patient has not done so within the assessments they received via email. All assessments received by patients give the patient the option to stop assessments at any time. When they receive an email with their assessment, there will be a button that they can click to stop further assessments.

Navigating as a Practitioner

Practitioners Home Screen (Organization Admin)

Association
chiropratique
canadienne

Canadian
Chiropractic
Association™^{MCC}

Canada

Hello, Dillon Dantes (Organisation Administrator) [Logout](#)

[Home](#) [WorkList](#) [Patient](#) [Reports](#) [Admin](#) [My Settings](#) [Help](#) Organisation: **DefaultSysOrg**

Good evening Mr Dillon Dantes, what do you want to do?

Add or view a patient

Go to my worklist

Amend my organisation's set up

As an organization administrator, you have access to your organization information and additional functionalities, including the “Amend my organisation’s set up” and the Admin tab.

If a practitioner joins the organization but is not an organization administrator, they will not have access to these two additional functions. Instead, it will look very similar to the receptionist’s home screen.

Add or View a Patient

This process is the same as the receptionist. Please view the receptionist section about adding or viewing a patient to understand this task (see pages 15 to 18).

Go to WorkList



Good evening Mr Dillon Dantes, what do you want to do?

Add or view a patient

Go to my worklist

Amend my organisation's set up

When you choose “Go to my worklist” from the home page (or hover over the WorkList tab and choose “Practitioner”), you will be shown a screen that gives you information about recent responses from patients who have registered with you.

Practitioner: Dr Dillon Dantes ▼

WorkList - Practitioner

Patient Emails

- No emails to show

Show email items marked as hidden

GP Letter

View	Action	Practice	Patient Name	First Appointment Date	GP Letter Status
No Records To Display.					

Show GP records marked as hidden

Show GP records where outcome assessments have been received in the last 14 days only

Latest Completed Assessments

Patient	Assessment	Action	Practice	Patient Name	Assessment Type	Completed Date	Printed Date	Completed Via Email
No Records To Display.								

Show assessments that were created in the last 14 days only

Show assessments that are marked as hidden

Latest Presentations

Patient	Presentation	Practice	Patient Name	First Appointment Date	Created Date
No Records To Display.					

Show only first appointments today
 Show All

Patients Awaiting Diagnosis

Presentation	Diagnosis	Practice	Client File No	Patient Name	First Appointment Date
<input type="button" value="View"/>	<input type="button" value="Update"/>	Chiro		Jonathan Lefty	11-Jan-2017

Show first appointments in the last 2 weeks
 Show All

Patients For Review

Patient	Presentation	Practice	Patient Name	Comment
No Records To Display.				

The four most important sections in your WorkList screen are outlined below:

1. **Patient Emails**: These are emails that patients may have sent to you through replying to an automatic email they received. An email will also be sent to your personal email address by the system to let you know that a message from a patient has arrived. Selecting “View email” from the list brings up the email window. From here, the message may be read and replied to. If the message is more appropriately dealt with by reception, click the “Move to Receptionist’s WorkList” button. Any messages sent in this way should be checked in event that they contain valuable information for clinical use or other reasons.
2. **GP Letter**: This section contains personalized templates you may find useful when writing reports from the information generated from the assessments.
3. **Latest Completed Assessments**: This section lists the most recent assessment returns from patients.
4. **Latest Presentations**: Here you will find the most recently added patients or presentations on your list.

Note: When a patient completes an outcome assessment, the practitioner is notified by email with a summary. For reasons of confidentiality, this email does not contain the patient’s name but they can be identified by their practice file number (if any) and a system number assigned by the system. Their complete assessment can be found in the Latest Completed Assessments or the Latest Presentations tab.

Reports (Summary)

The screenshot shows the top navigation bar with the Association's logo on the left and a Canadian flag on the right. The user is identified as Dillon Dantes, an Organisation Administrator, with a Logout link. The main navigation menu includes Home, WorkList, Patient, Reports, Admin, My Settings, and Help. The Reports menu is open, showing options for Summary, Satisfaction, and Outcome Data Report. Below the menu is a form for generating a Summary Report. The form includes fields for Date From and Date To, Organisation (DefaultSysOrg), Practice (All), and Practitioner (All), along with a GO button.

Hovering over the Reports tab and choosing “Summary” allows you to view collated results for all patients who have returned their assessments and compare these results to the pooled results of other practitioners in the system.

You are able to search through specific dates and change the organization, practice, and practitioner details. Clicking the “GO” button will populate the report. As an organization administrator, you have access to view results of other practitioners and practices. However, if you do not have that access, you will only be able to view your own results and collated results of all ChiroPatientsMatter members. This report can be used to compare your results with either of two groups: everyone within your organization, or everyone using the platform. It is NOT possible to see an individual practitioner’s results from outside of your organization.

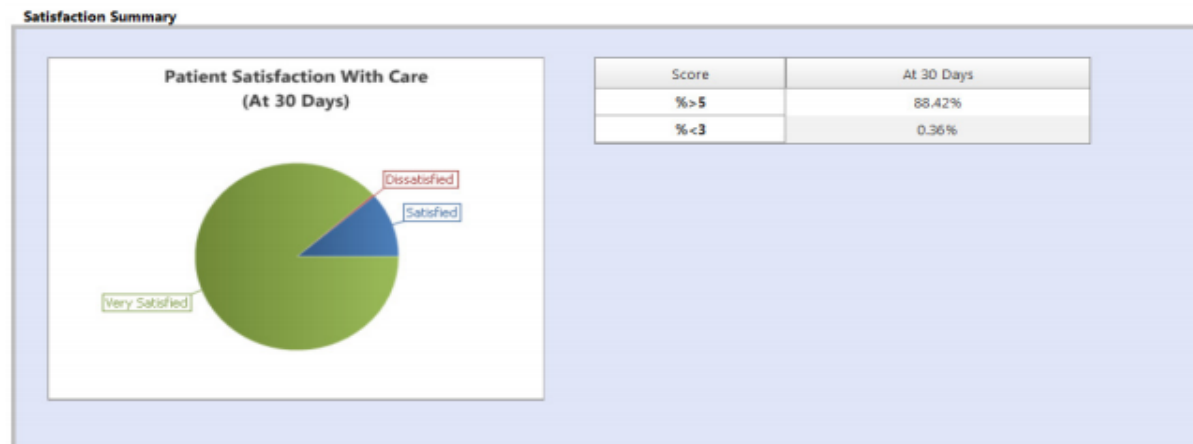
NOTE: It is not advised to put too much weight on results with fewer than 20 responses from patients at each assessment point, otherwise one errant assessment can significantly distort the results. Also, please be aware that results may vary considerably between practitioners and practices because of the types of patient seen. For example, practices seeing patients presenting with more chronic conditions or comprising an older population are likely to have different results from those seeing more sports-related complaints or with a higher proportion of acute presentations.

The report you generate contains four different charts/graphs:

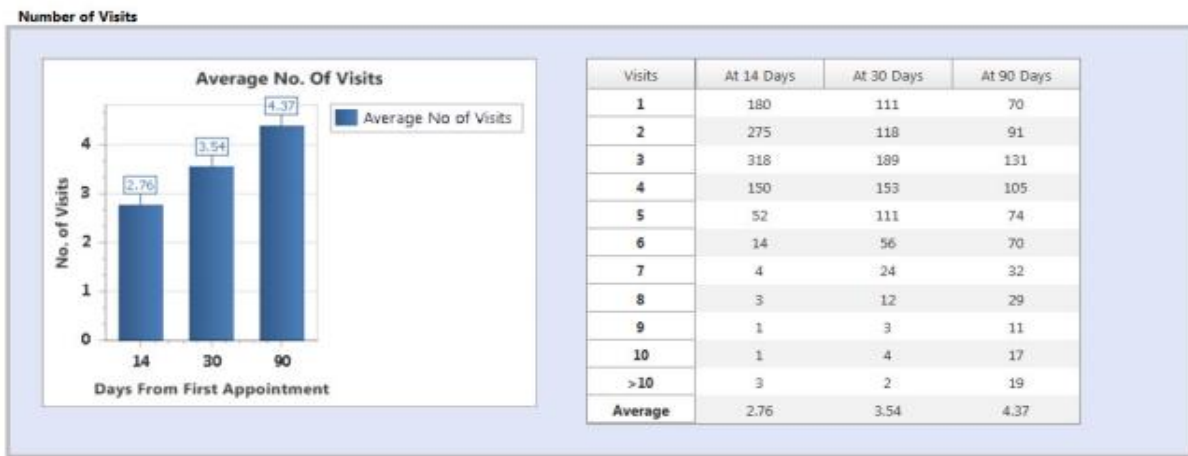
PGIC (Patients' Global Impression of Change) summary: This summary describes the proportion of patients reporting a definite improvement (score of >5) at 14, 30, and 90 days.



Satisfaction summary: As part of the assessment at 30 days, patients are asked how happy they have been with the way they have been treated by the clinic. This is a global measurement is separate from the more detailed CPAQ assessment.



Number of Visits: Each time a patient completes an assessment, they are asked how many visits they have had so far.




Assessment compliance summary: This graph shows the proportion of patients who have completed the assessments sent to them.



A table is present next to each chart/graph with a more detailed analysis, which can be pasted into a spreadsheet for further manipulation, analysis, and comparisons.

Each chart/graph is also selectable, allowing you to copy and paste them for use elsewhere, such as in marketing materials, reports, and more.

Reports (Satisfaction)

Association chiropratique canadienne Canadian Chiropractic Association 

Hello, Dillon Dantes (Organisation Administrator) [Logout](#)

Home WorkList Patient Reports Admin My Settings Help Organisation: **DefaultSysOrg**

Satisfaction Summary

- Summary
- Satisfaction**
- Outcome Data Report

Date From: Date To:

Organisation:

Practice:

Practitioner:

The College of Chiropractors has developed a suitable tool for the collection of patient satisfaction data using an online survey. This was done by adapting an existing, validated tool used widely by GPs (GPAQ), renamed as 'CPAQ'. This page provides an overview of the responses provided by patients. More comprehensive reporting will be available in future.

Hovering over the Reports tab and choosing “Satisfaction” brings up the satisfaction summary report window. Information collected from this section is taken from the CPAQ (Chiropractic Patient Assessment Questionnaire) questionnaire.

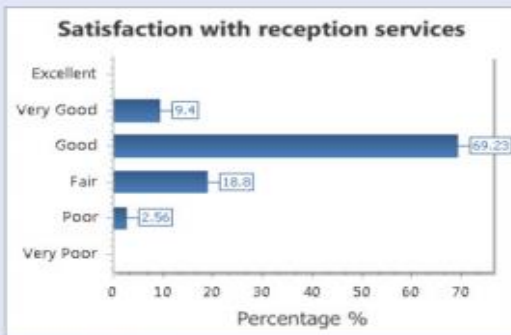
The anonymous CPAQ (20 days) survey covers a range of areas including:

- Reception
- Ease of making an initial appointment
- Ability to make the appointment at convenient time
- Time waiting in clinic for appointments
- Ease of contacting the clinic by phone
- Consultation and treatment factors

You are able to search through specific dates and change the organization, practice, and practitioner details. Clicking the “GO” button will populate the report. As an organization administrator, this report can be used to compare your results with either everyone within your organization or everyone using the platform. You also have access to other practitioners’ results. If you not set up as an organization administrator, you will be able to view your own results, the practice/organization results, and everyone’s results using the platform. It is NOT possible to see an individual practitioner’s results from outside your organization.

At present, the system provides two summary graphs for the Satisfaction Summary: a satisfaction profile relating to reception services, and satisfaction with the care provided.

Satisfaction with reception services



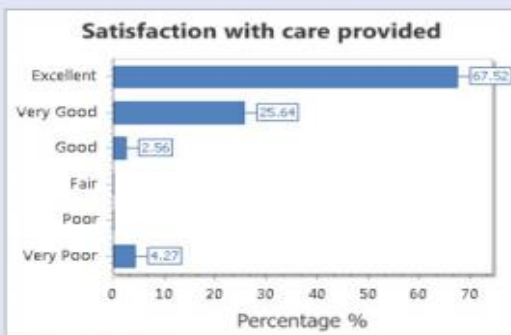
117 assessments found

Satisfaction Level	Percentage %
Excellent	0.00
Very Good	9.40
Good	69.23
Fair	18.80
Poor	2.56
Very Poor	0.00

Reception services here is a summary of questions enquiring about patients satisfaction with:

- The way they have been treated by reception
- Opening hours
- How quickly an appointment is available
- Waiting time in clinic

Satisfaction with care provided



117 assessments found

Satisfaction Level	Percentage %
Excellent	67.52
Very Good	25.64
Good	2.56
Fair	0.00
Poor	0.00
Very Poor	4.27

Care provided here is a summary of questions enquiring about patients satisfaction with:

- How thoroughly they feel they have been asked about their symptoms
- How well they have been listened to
- How well they were put at ease during examination
- How well they were involved in decisions about their care
- How well their problem & treatment was explained
- The amount of time they had with their clinician
- The patience their clinician had with them
- The caring and concern shown to them

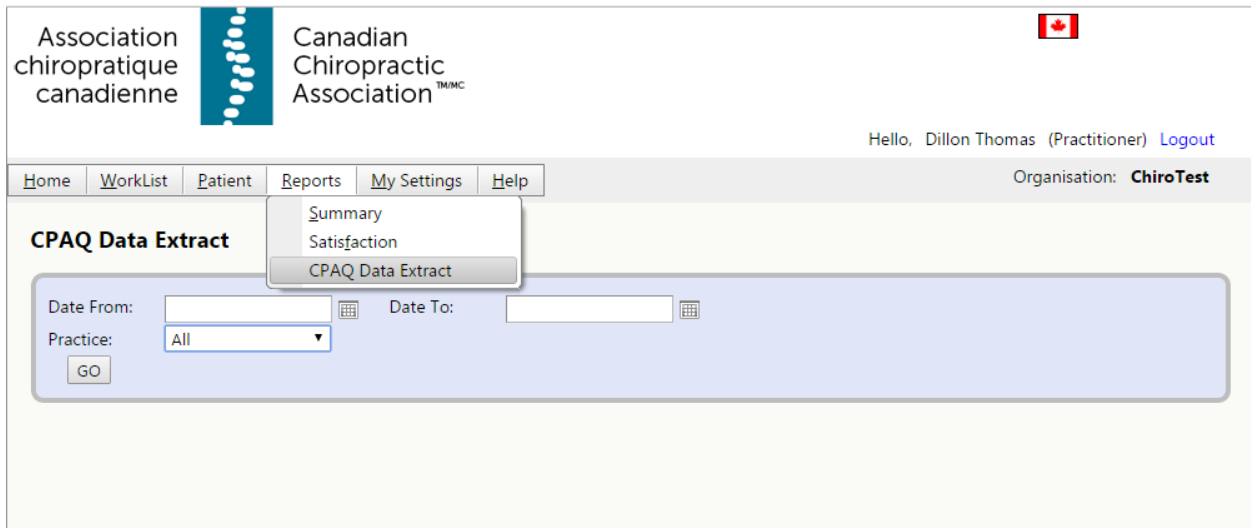
A table is present next to each graph with a more detailed analysis which can be pasted into a spreadsheet for further manipulation and analysis.

Each of the graphs is selectable, allowing you to copy and paste them for use elsewhere, such as in marketing materials, reports, and more.


CPAQ (Chiropractic Patient Assessment Questionnaire) Data Extract






This section is being updated to better serve the needs of our Canadian chiropractors. We will be updating this guide very soon and providing you with details when it is available.

This section can be found in the reports tab under “CPAQ Data Extract” (as seen below). At this time, you will only be able to download the raw results. We are building the platform to allow the raw results to be transformed into useful data.



Viewing Detailed PROMs (Patient Reported Outcome Measures) Reports

Action	First Appt Date	Practice	Practitioner	Status
	27-Sep-2016	Chiro	Dr Dillon Dantas	STOPPED

Assessments								
	Created Date	Type	Completed Via Email	Emailed	Printed	Emailed Date	Printed Date	Completed Date
	26-Dec-2016 00:07:38	Outcome	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	28-Dec-2016 00:22:49		
	22-Dec-2016 20:12:22	Satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			21-Dec-2016 00:00:00
	27-Oct-2016 00:07:38	OutcomeSatisfaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	27-Oct-2016 00:07:42		29-Nov-2016 00:00:00
	11-Oct-2016 00:07:38	Outcome	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13-Oct-2016 00:22:40		24-Oct-2016 00:00:00
	27-Sep-2016 21:01:49	Initial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	27-Sep-2016 21:09:14	27-Sep-2016 21:14:34	27-Sep-2016 00:00:00

After searching for a patient and double-clicking on their name, you will bring up the patient's presentation history (shown above). This shows minimal information about the patient and displays the assessments created for the patient and the dates on which they were completed (or not completed, as indicated). You can click on each assessment (using the green arrow) to see a more detailed analysis.

However, if you click on the "View" button, it will open another window that has more detailed information for that particular patient. This detailed report will also contain the patient's responses to PROMs in a box titled "Progress" (as shown in the image below).

Progress

System Ref Id: 8334

	27-Sep-2016	24-Oct-2016	29-Nov-2016	21-Dec-2016
MYMOP Profile	4.50	2.75	1.40	
Symptom 1	5	3	2	
Symptom 2	5	3	2	
Symptom 3				
Symptom 4				
Activity	5	3	1	
Wellbeing	3	2	2	

MYMOP Assessment Details

Symptom 1 : sore back

Symptom 2 : tightness

Activity : getting dressed

Statement from PGIC

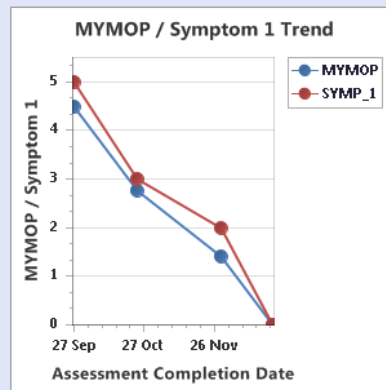
24-Oct-2016 : Slightly Improved

29-Nov-2016 : Much Improved

Satisfaction Statement

21-Dec-2016 : Better than I was expecting.

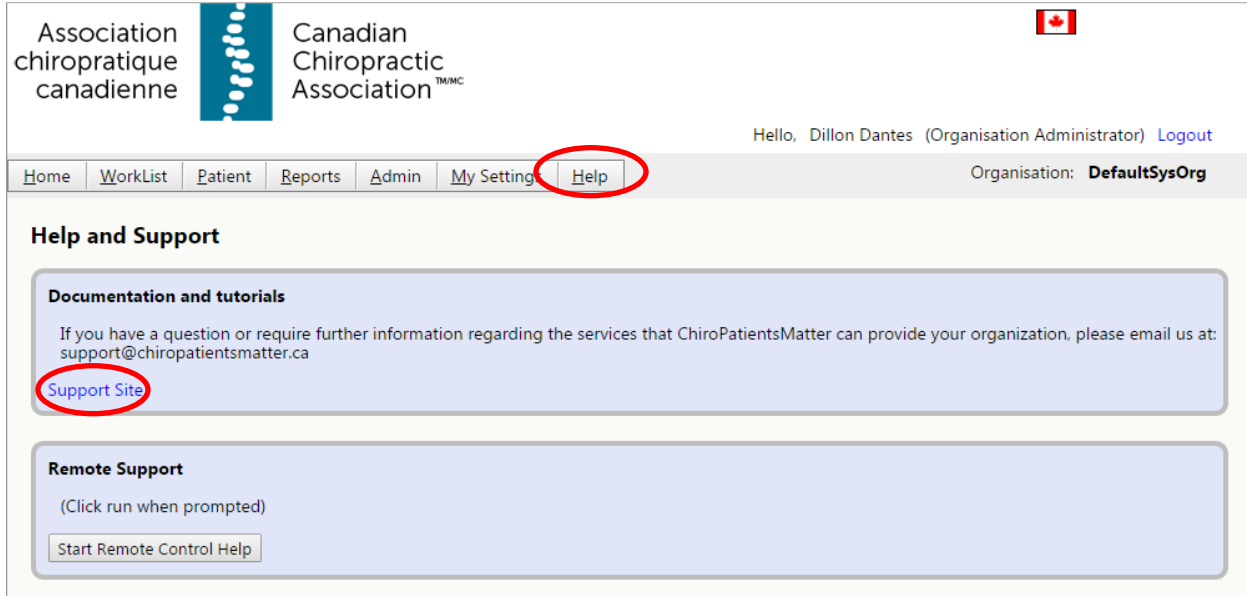
The MYMOP is a validated patient reported outcome measure. For more details see <http://sites.pcmd.ac.uk/mymop>



This section contains a summary and an in-depth analysis of one particular patient as they progress throughout the system from the initial assessment all the way to the 90-day follow-up. This section displays comprehensive summary information about that patient as they move through their journey of care.

Support Page

If you are ever stuck and require further assistance, our support page will provide you with some useful resources.



The screenshot shows the top navigation bar with the following elements:

- Association chiropratique canadienne logo
- Canadian Chiropractic Association™/M.C. logo
- Canadian flag icon
- User greeting: Hello, Dillon Dantes (Organisation Administrator) Logout
- Navigation tabs: Home, WorkList, Patient, Reports, Admin, My Setting, **Help** (circled in red)
- Organisation: DefaultSysOrg

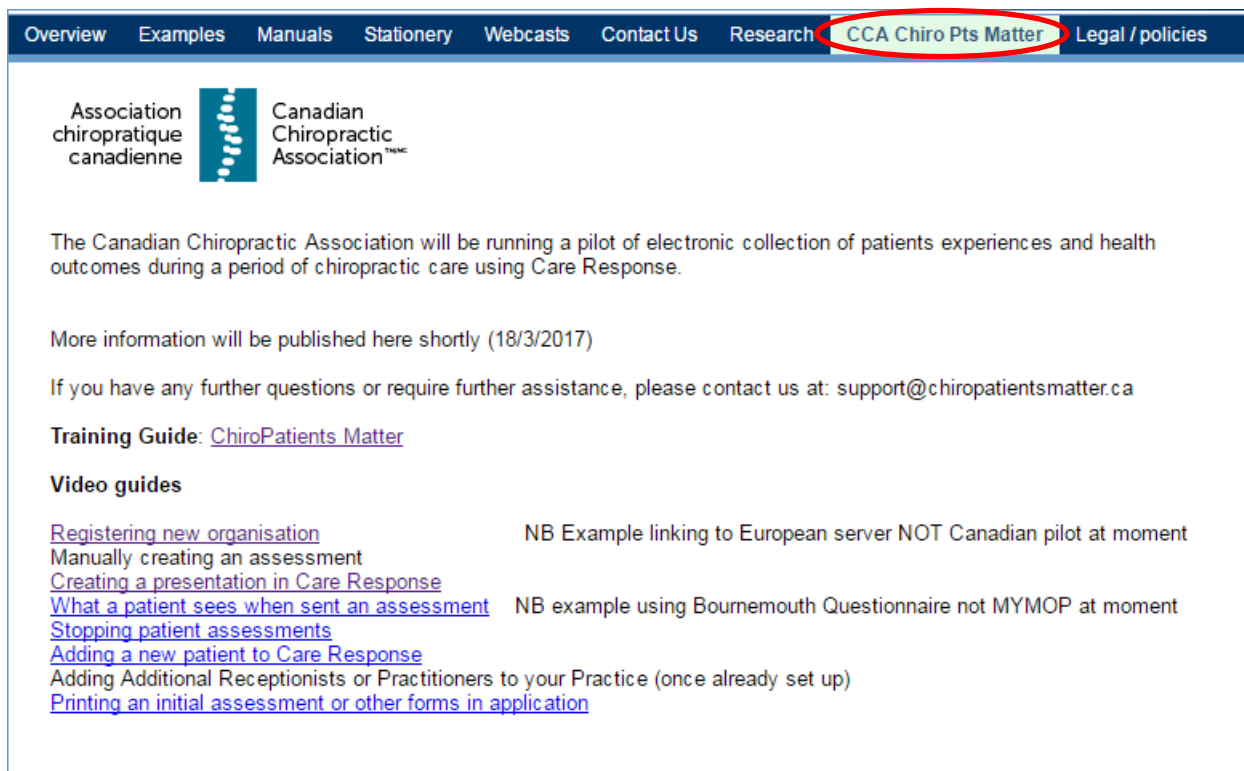
The main content area is titled "Help and Support" and contains two sections:

- Documentation and tutorials**: A text box containing the email address support@chiropratiensmatter.ca and a link to [Support Site](#) (circled in red).
- Remote Support**: A section with the text "(Click run when prompted)" and a button labeled "Start Remote Control Help".

If you click on the Help tab, this page will appear (see above). An email address is also provided if you have a question or concern that you would like to talk to us about.

Clicking on the “Support Site” link will take you to the support page (see next page).

For the pilot of ChiroPatientsMatter, our support page will be shared with Care Response. We have a designated tab called CCA Chiro Pts Matter that will hold videos, this training guide, and our email address for you to contact us.



The screenshot shows a website navigation bar with the following tabs: Overview, Examples, Manuals, Stationery, Webcasts, Contact Us, Research, **CCA Chiro Pts Matter** (highlighted with a red circle), and Legal / policies. Below the navigation bar is the logo for the Association chiropratique canadienne and the Canadian Chiropractic Association™. The main content area contains the following text:

The Canadian Chiropractic Association will be running a pilot of electronic collection of patients experiences and health outcomes during a period of chiropractic care using Care Response.

More information will be published here shortly (18/3/2017)

If you have any further questions or require further assistance, please contact us at: support@chiropratiensmatter.ca

Training Guide: [ChiroPatients Matter](#)

Video guides

- [Registering new organisation](#) NB Example linking to European server NOT Canadian pilot at moment
- [Manually creating an assessment](#)
- [Creating a presentation in Care Response](#)
- [What a patient sees when sent an assessment](#) NB example using Bourmemouth Questionnaire not MYMOP at moment
- [Stopping patient assessments](#)
- [Adding a new patient to Care Response](#)
- [Adding Additional Receptionists or Practitioners to your Practice \(once already set up\)](#)
- [Printing an initial assessment or other forms in application](#)

Note: Some of the videos discussed in this section will relate to Care Response. As both platforms function in the same way, this should not be a problem. We are working on upgrading these videos as we progress through the pilot.