

# PMP

## OCA'S PATIENT MANAGEMENT PROGRAM

MASSAGE THERAPY

PUTTING EXPERIENCE INTO PRACTICE

### Putting experience into practice

PMP is practice enhancement software that's backed by experienced support-line staff.

Our practice management software has been a trusted resource in health care offices since 1991. You can have confidence in the OCA's commitment to adapt PMP to meet evolving billing and record-keeping regulations and legislation.



### Excellent Value

PMP does it all at a price you can afford.

### Technical support

is provided by staff with real front-line experience in health care offices. Support is available via Internet, by email, or through our toll-free help line.

### Regular updates

and enhancements are provided to meet the changing needs of your practice.

### Features

- Schedule patients and book appointments easily
- Process patient activity and manage patient accounts
- Merge patient data to produce personalized communications
- Generate statistical reports to help you analyze and improve your practice

Ontario Chiropractic Association. **Treatment That Stands Up.**



# PUTTING EXPERIENCE INTO PRACTICE

PMP offers a wide range of features that can help boost your efficiency and effectiveness, allowing you to focus on your patients. It's a software solution that manages all your patient information, including patient visits, WCB billings and reconciliations, reporting, letter writing and more.

- **Main screen appointment book**

Customize patient appointment schedules, make single or multiple appointments and book patients with one or more practitioners.

January 2009		Monthly Report - Clinic		Location - ALL Page No. 2	
<b>Receipts</b>		<b>Claims and Fees</b>		<b>Patient Categories</b>	
Patient Payments Received	0.00	Patient Fees	1150.00	Adult	28
Cash	0.00	Inventory Fees	989.00	Student	2
American Express	0.00	H.S.T.	0.00	Child	0
Cheque	410.00	Total Inventory Fees	989.00	No Charge	2
Debit Card	30.00	Discounts	0.00	Senior	2
Gift Certificate	229.65	Write Offs	0.00	Compassionate 1	0
MasterCard	0.00	WCB Claims	100.00	Compassionate 2	0
Transfer To/From	215.00			Compassionate 3	0
Visa	0.00			Family member	0
Other	336.00			MVA	0
	0.00			Unused	0
<b>Total Patient Payments</b>	<b>1219.65</b>	<b>Total Fees Charged</b>	<b>2239.00</b>	Unused	0
WCB Payments Posted	0.00	Rescheduled	1	Unused	0
		Postponed	5	Unused	0
		Missed	3	Unused	0
		Cancelled	1	Unused	0
<b>Total Payments Received</b>	<b>1219.65</b>			<b>Total Patients Seen</b>	<b>36</b>
<b>Doctor of Record</b>		<b>AR as of Tuesday, 15-Sep-2009</b>		Subsequent Visit Claims	42
Daniel David Palmer, DC #4444	2,149.00	Patient	8250.22	New Patient Claims	0
Laurel Hardy, RMT# F222	30.00	Bill To	28.00	Re-examination Claims	1
Benjamin Pierce, DC #6911	60.00	EHC	3727.99	Total Visit Claims	43
		MVA	1645.02	X-ray Claims	0
		3rd Party	5401.08		

Summary Sheets include Fees, Receipts, Accounts Receivable, Patient Stats, and Appointment Stats

- **Easy access to patient files**

With one keystroke you can access all your patients' information, add a new patient, update and change patient information and print receipts or envelopes. Simply click on tabs to view or edit appropriate data.

- **Access PMP functionality quickly and easily**

Access the program by menus, function keys and shortcuts to process activity and update records. Edit the program date to process previous claims when necessary.

- **Program designed for multiple doctors and their associates**

Reports, accounts receivable, billing and reconciliation, doctor hours and appointment books can all be differentiated by practitioner. PMP will accommodate up to 27 individual chiropractors and practitioners.

- **Add customized messages to individual patients**

Use the 'Pop Up' and 'Comments' features to add customized messages to patient records.

- **Effective communication**

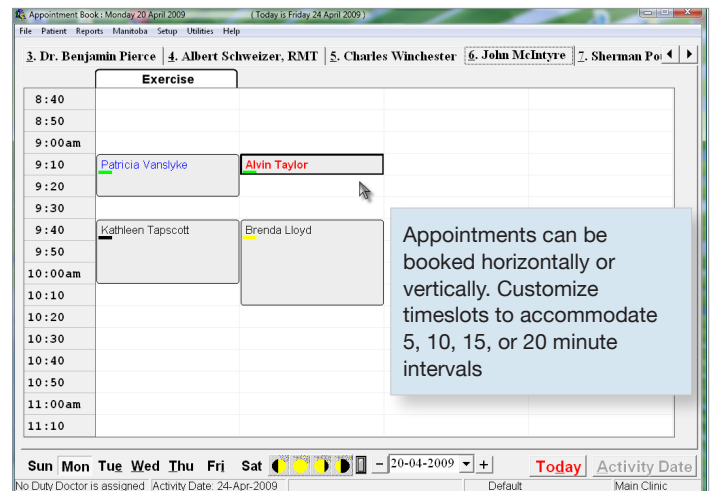
Merging, importing, exporting and designing templates can be done from within the program without the use of another word processor.

- **Reliable recall management**

Helps you ensure no patient falls through the cracks.

- **Privacy and security**

PMP takes privacy of information seriously – yours and your patients'.



## PMP USER BENEFITS:

### Free upgrades and great support

The Support Line staff members are the best in the business at offering quick and knowledgeable assistance (that's what our users tell us).

### Toll-free support line

Contact the Support Line at 416-860-7199, toll-free at 1-800-561-7361, or reach us by email at support@chiropractic.on.ca. Support is available 7:30 a.m. to 5 p.m. EST, Monday to Friday excluding holidays. Visit us on our website at www.chiropractic.on.ca.

### Annual enhancements suggested by users

PMP is a continuously evolving program, and we welcome user feedback and suggestions.

## INITIAL LICENCE FEES

The Patient Management Program is available for an initial licence fee of \$648 for a primary massage therapist. When additional practitioners in the same practice are being added to PMP, the licence fee is \$400 each. All practitioners who practice in more than one location will be charged a \$25 administration fee for the second location and each subsequent location. Applicable taxes will be added to all the above fees. The initial package includes software, a User Manual and unlimited, toll-free telephone support for the period up to July 31.

## OWNERSHIP AND SUPPORT

The Ontario Chiropractic Association retains ownership of all Patient Management Programs. Practitioners who maintain their annual licence agreement will have the right to use PMP on a yearly basis. Annual licence fees are not pro-rated and discounts and refunds do not apply. The annual licence fee includes unlimited, toll-free telephone support for the period up to July 31. A contractual relationship exists between the OCA and the primary licensee which defines the rights and responsibilities of each party. Only the primary licensee has permission to authorize changes to the PMP including but not limited to adding, updating and deleting practitioners. Changes can only be made to the Patient Management Program with the permission of the OCA and the knowledge and express written permission of the primary licensee.

## ANNUAL LICENCE FEES

All practitioners choosing to use the Patient Management Program must pay an annual licence fee in order to maintain the right to use the program. The annual licence fee is \$448 for the primary practitioner and \$224 for each additional practitioner in the same practice. All practitioners who practice in more than one location will be charged a \$25 administration fee for the second location and each subsequent location. Applicable taxes will be added to all the above fees. The annual licence fee covers the cost of program enhancements, updates and unlimited, toll-free telephone support for the period from August 1 to July 31. The primary licensee must renew the licence by August 1st of each year in order to receive the program update. This applies to all practitioners within the same clinic. Until full payment is received for all practitioners a PMP update will not be released to the clinic. Should a primary practitioner cease to be a PMP user in good standing, alternate arrangements must be made for associates within the same office.

*Prices subject to change without notice*

The screenshot shows a software interface for patient information. At the top, there are several tabs: Personal, Health, Pop Ups, Comments, Bill To / Emp., Appointments, Account / Activity, WCB, EHC, and MVA. The 'Personal' tab is active. The form contains various fields for patient details, including: Pat No. (1), Doctor of Record (Daniel David Palmer, DC #4444), Preferred Location (Clear), First Name (Adrienne), Last Name (Linton), Address (1 Hook Avenue, San Francisco, CA, 90210, USA), Phone Numbers (Home: (909) 731-0702, Work: (909) 633-3000, Cell: (909) 555-1212), Email (Adrienne@SF.ca), Referrals (Referred By Patient: Dr. Mary Smith), Date of Birth (06-08-1949), Age (60), Sex (Female), Patient Type (Cash), Patient Category (Adult), Payment Type (Visa), Default Code (A), Flags (G), Active (checked), Auto Statements (unchecked), Do NOT contact (checked), Maiden Name, A/R Type (Patient), and Send Statements To (BillTo). At the bottom, there are navigation buttons: Next, Previous, Save, Cancel, New Patient, and a search section for a patient by Last name, Number, First name, or Other. A note at the bottom left says 'Press F2 to add an appointment, or press F10 to process an activity'.

Patient information screen with multiple tabs.

### Required hardware specifications:

- Windows Vista operating system with 1GB RAM or XP Pro with 512 MB RAM
- Intel Pentium 4 1.6 GHz or equivalent with 5 GB hard drive or above
- Onsite internet connection with internal or external modem

**Informative newsletters and a comprehensive, easy-to-use manual**  
Loaded with hints, tips and pertinent information.

**Order your program today**  
To order PMP please complete the order form and return it, together with your payment, to the OCA office. Please allow up to 10 business days for the processing of your order.

**For more information please contact**  
Liz Pridham  
Software Support Representative  
416-860-4163 or 1-877-327-2273, ext. 4163  
or email [lpridham@chiropractic.on.ca](mailto:lpridham@chiropractic.on.ca).

# PMP ORDER FORM & USER AGREEMENT FOR MESSAGE THERAPISTS

*This form must be completed in full, signed by all practitioners and returned to the OCA office with payment.*

Primary RMT: \_\_\_\_\_

Clinic address: \_\_\_\_\_

City/Town: \_\_\_\_\_ Postal code: \_\_\_\_\_

Shipping address (if different from above): \_\_\_\_\_

Tel: (        ) \_\_\_\_\_ Fax: (        ) \_\_\_\_\_ Email: \_\_\_\_\_

Licence Fees	PMP Fee		HST		Total Fee	Quantity	Total
Primary RMT	\$648.00	+	\$84.24	=	\$732.24	x (    ) =	\$ _____
Additional practitioners	\$400.00	+	\$52.00	=	\$452.00	x (    ) =	\$ _____

**TOTAL ENCLOSED \$** \_\_\_\_\_

Send order:  on CD  via email

*Please allow 10 business days for processing.*

**Each initial package includes software, manual and toll-free telephone support until July 31.**

*Prices subject to change without notice.*

Method of Payment:  Cheque  VISA  MasterCard

Card # \_\_\_\_\_ Expiry: \_\_\_\_\_

Name on Credit Card: \_\_\_\_\_ Signature: \_\_\_\_\_

*The undersigned hereby agree(s) to use the OCA Patient Management Program (PMP) within my/our practice only and I/we will not make or allow to be made any other copies of the program except for the purpose of safekeeping and the backup of my/our data. I/we agree not to modify, amend, disassemble, recompile or create derivative works of the OCA Patient Management Program. I/we understand and agree that I/we only have a right to use the program as long as I/we have paid the Annual PMP licence fee. The PMP shall at all times remain the property of OCA and I/we shall have no right, title or interest therein, except as stated. I/we agree to not sell, transfer or otherwise make available the PMP and copies thereof to others. I/we agree that the OCA will in no event be liable for any indirect, special or consequential damages including damages arising from my/our lost profits from use of the PMP. I/we understand that the provision of technical support by the OCA may require the transmission of confidential patient and practice information from my/our practice to the OCA. Any such transmission between the OCA and my/our office shall be via encrypted message or direct delivery of computer disk or CD. This information shall be treated in strictest confidence and viewed only by support personnel for technical reasons. Following the provision of support, any confidential information possessed by the OCA shall be destroyed. There are no express or implied conditions or warranties, including the warranties of merchantability and fitness for a particular purpose not specified herein respecting this agreement, software, documentation or services provided. Notwithstanding any other term or provision of this Agreement, the OCA's liability to the Customer for any cause whatsoever shall be limited to the amount paid by the Customer to the OCA for the PMP software for the last six (6) months preceding the event, (or last of a series of events), which gave rise to the claim. Direct damages subject to this limit shall be the Customer's sole and exclusive remedy. All claims for damages must be asserted within six (6) months of the event (or last in a series of events), to which they relate or be forever barred.*

Primary RMT authorizing signature: \_\_\_\_\_

Please fill in information for practitioners being added to the Patient Management Program.

A signature below indicates acceptance of these terms and conditions.

1. Primary Licensee: \_\_\_\_\_ Profession: \_\_\_\_\_  
Licence # \_\_\_\_\_ Signature: \_\_\_\_\_
2. Practitioner: \_\_\_\_\_ Profession: \_\_\_\_\_  
Licence # \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_ For additional practitioners please copy and attach separate sheet.

<b>FOR OFFICE USE</b>	Membership Status: _____	Payment Date: _____
	Serial Number Issued: _____	Date Shipped: _____

## ONTARIO CHIROPRACTIC ASSOCIATION

Tel: 416-860-7199 ■ Toll Free: 1-800-561-7361 ■ Fax: 416-860-0857 ■ Email: support@chiropractic.on.ca