

**Create Detailed Treatment Summaries for MD's in Seconds!**

Sending *Initial Visit Summaries* and *Release Reports* to your patient's primary care provider is one of the best ways to build your practice - and a reputation of clinical excellence.

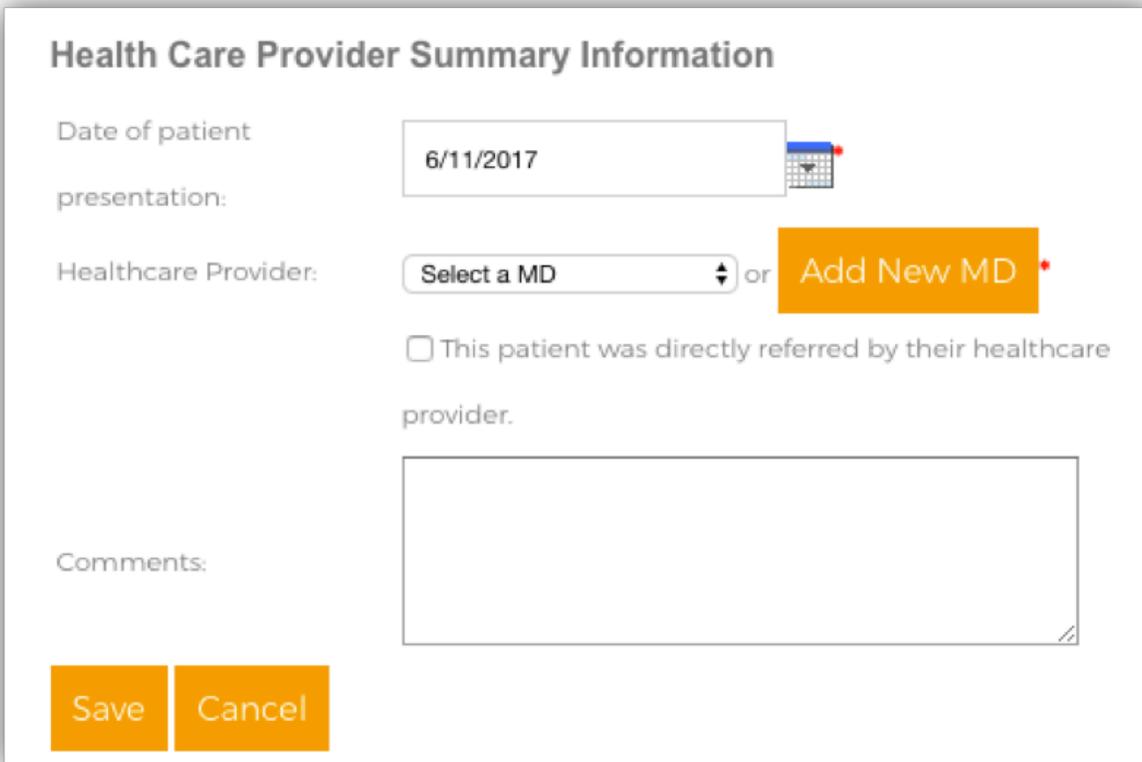
Busy MD's generally do not take time to read a detailed initial soap note, however, most would read and appreciate a brief synopsis of your initial visit assessment and care plan.

Unfortunately, creating these customized summaries takes considerable time and effort...until now. ChiroUp has automated the process of creating detailed *Initial Visit Summaries* and *Release Reports*.

To create an *Initial Visit Summary*, simply select the new check box at the bottom of the condition report menu:



This will bring up a new data capture form:

A screenshot of a web form titled "Health Care Provider Summary Information". The form contains several fields: "Date of patient presentation:" with a date input field showing "6/11/2017" and a calendar icon; "Healthcare Provider:" with a dropdown menu showing "Select a MD" and an "Add New MD" button; a checkbox labeled "This patient was directly referred by their healthcare provider."; a large text area for "Comments:"; and two orange buttons at the bottom labeled "Save" and "Cancel".

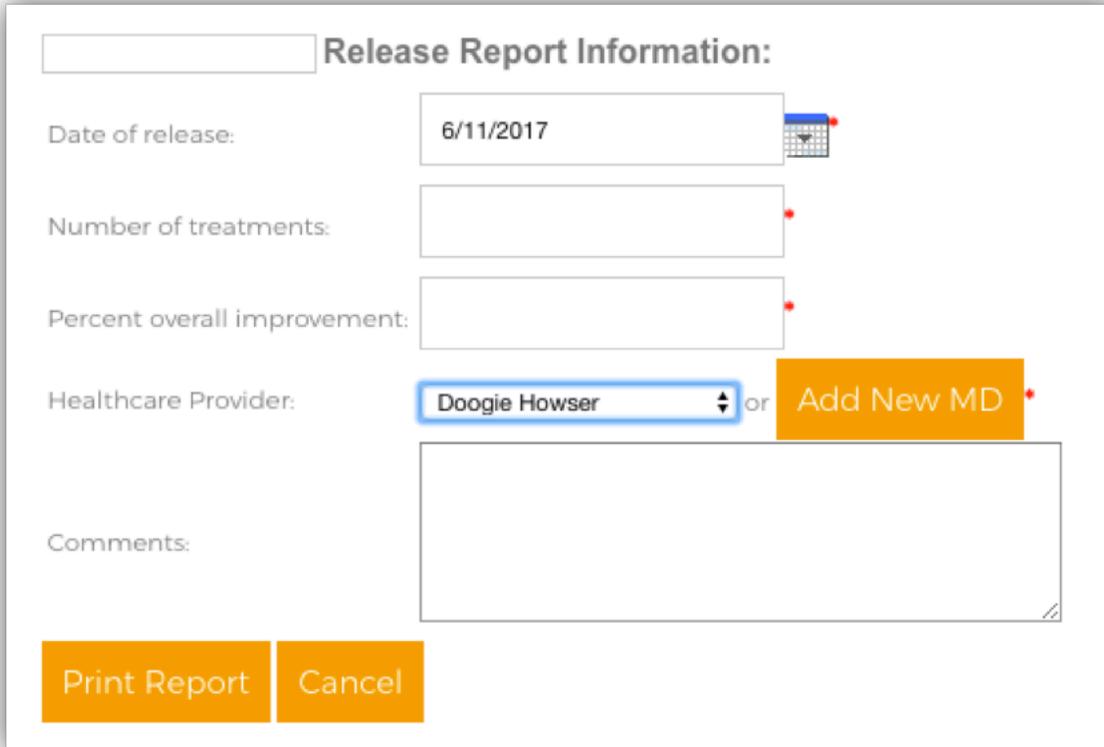
Simply select the Healthcare providers name, indicate whether the patient was directly referred or not, and add any optional comments. Just like that... your *Initial Visit Summary*, customized to your patient and branded to your clinic, will be printed at the same time that you print or email the patient's accompanying *Condition Report*. This *Initial Visit Summary* can then be faxed to the patient's healthcare provider. To make it easy on your staff we've even added a field for the MD's fax number on the report.

Check out this [sample initial report](#).

## Up Your Game Even More

Sending **Release Report's** can generate even more MD referrals. In practice, most providers only hear about other provider's failures. Patients do not generally schedule a visit to relay that Dr "X" solved their problem - so that's your job. Consistently sending positive reports builds your reputation of excellence by allowing primary care providers to repeatedly see your success.

ChiroUp has automated this process too. To create a **Release Report**, navigate to the *Exercises and Reports* tab, then from the dropdown menu, select *Find exercises and reports/Find condition report* (*Release reports* can only be provided for patients who were given a ChiroUp lay *Condition report*). Search for the patient and click on "Create" under the release report column. This will bring up another data capture form:



The screenshot shows a web form titled "Release Report Information:". It contains several input fields: a date field with "6/11/2017" and a calendar icon; a text field for "Number of treatments"; a text field for "Percent overall improvement"; a dropdown menu for "Healthcare Provider" with "Doogie Howser" selected and a red dot next to it, followed by the text "or" and a yellow button labeled "Add New MD" with a red dot; and a large text area for "Comments". At the bottom, there are two yellow buttons: "Print Report" and "Cancel".

If you created an earlier *Initial Visit Summary*, the provider's name will be auto-populated. Simply indicate the patient's number of treatments, percent overall improvement, and any optional comments. Select "Print" and you'll have a detailed **Release Report** branded to your clinic that looks [like this example](#).

You can add any Healthcare provider's name and address to your database either when creating a report or by navigating to the *Customize* menu tab and selecting **Healthcare Provider Database**.

For efficiency, we encourage you to task a staff member with adding your local provider's information to the database now so that report creation is streamlined.

Plus, this **Healthcare Provider Database** will serve as the foundation for an expanded MD marketing automation program planned for later this year! (Preview alert- you will be able to instantly create a spreadsheet for any MD that lists all of their patients that you treated in the past x months including the individual diagnosis and outcome statistics.) We would welcome your suggestions for improving this functionality.