



See What's New from PayDC!

Here's what's in this Release (April 20th, 2023)

We've changed the way patients are identified in the PayDC Chiropractic Software and the Patient Portal.

- Patients' Usernames for our Patient Portal and Online Scheduler will no longer be the patient email address.
- Each patient will now be assigned a unique Username upon being sent an invitation to our Patient Portal with our Welcome Email.
- We are taking this step to protect the security of our Patient Portal and ensure that your patients' PHI remains protected in the future.
- This will allow multiple patients (such as family members) to share an email address to receive notifications and reminders while still logging in to the correct patient file in the Patient Portal.
- This will also allow patients to log in to the Patient Portals of separate PayDC client offices with unique credentials for each office.

The "Send/Resend/Reset Patient Email" check box is changed to "**Send Welcome Email**" and "Send copy to Office" check box has been removed.

The screenshot displays the 'Initial Patient Questionnaire' form within the PayDC software. The form is titled 'Initial Patient Questionnaire' and includes a 'Today's Date' field showing '04/20/2023'. The form is divided into several sections: 'Identification Details (Patient)', 'Date of Birth', 'Social Security Number', 'Gender', 'Primary Phone Number', 'Primary Email', 'Condition Related to?', 'Internal Comments', 'Employee/Student Basic Details', 'Marital Status', and 'Health Plan'. A red arrow points to the 'Send Welcome Email' checkbox, which is currently unchecked. The form also includes a 'Status: Form Modified' indicator and buttons for 'Edit', 'Print Condition Questionnaire', 'Print Patient Info', 'Save Patient Data', and 'Close'.



When adding a new patient, upon checking the “Send Welcome Email” checkbox and clicking Save Patient Data, an email providing the patient’s unique Username and Password will be sent to the patient email address listed and a copy is automatically sent to the office email address.

WELCOME: Boston Chiro Clinic

Add Patient

File Help

Initial Patient Questionnaire

Initial Patient Questionnaire

Today's Date: 04/20/2023

Identification Details (Patient)

Title **First Name **** Middle Name **Last Name **** Nick Name Suffix Account Number ** for required fields

None ▾ Jeff Murphy None ▾

Date of Birth ** Social Security Number Gender ** Primary Phone Number Primary Email

4/ 1/1989 ▾ - - - - - Male ▾ () - - - - - jeffmurphy@gmx.com

☒ Send Welcome Email

Condition Related to ?

The Patient's Condition is or may be Related to **

☐ Auto Accident (Occupant or Pedestrian) ☐ Accident in Someone Else's Home ☐ Other Accident ** for required fields

☐ Work-Related Accident ☐ Accident on the Premises of Someone Else's Business ☒ Non Accident

Internal Comments

Employee/Student Basic Details

☐ Patient is Employed ☐ Patient is a Student

Employer Name School Name

Attorney Information Name Phone Number Address Email

Marital Status

☒ Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed

☐ Spouse is Employed ☐ Spouse is a Student

Employer Name School Name

Health Plan

Does the Minor Patient or the Minor's Parents have Health Insurance that Covers the Care?

☐ Yes ☐ No ☒ Not Sure

Insurance Info

Status: Form Modified

Edit

Print Condition Questionnaire

Print Patient Info

Save Patient Data

Close



This is confirmed with the pop-up message.

Update Patient

PATIENT: Murphy, Jeff 04/01/1989

User Name: jemu025527

Patient ID: 25527

Today's Date: 04/20/2023

Initial Patient Questionnaire

Identification Details (Patient)

Title First Name ** Middle Name Last Name ** Nick Name Suffix Account Number ** for required fields

None Jeff Murphy None

Date of Birth ** Social Security Number Gender ** Primary Phone Number Primary Email

4/ 1/1989 Male () jeffmurphy@gmx.com ☒ Send Welcome Email

Condition Related to?

The Patient's Condition is or may be Related to **

☐ Auto Accident (Occupant or Pedestrian) ☐ Accident in Someone Else's Home ☐ Other Accident ** for required fields

☐ Work-Related ☒ Non Accident

Internal Comments

Employee/Student

☐ Patient School Name Address Phone Number Email

☐ Patient is a Student

Marital Status

☒ Single ☐ Spouse is Employed Employer Name

☐ Married ☐ Spouse is a Student School Name

☐ Separated

☐ Divorced

☐ Widowed

Health Plan

Does the Minor Patient or the Minor's Parents have Health Insurance that Covers the Care?

☐ Yes ☐ No ☒ Not Sure

Insurance Info

Status: Patient Data Saved

Edit Print Condition Questionnaire Print Patient Info Save Patient Data Close

Patient receives email with Username and Password.

Sent: Thursday, April 20, 2023 at 8:10 AM
From: "Boston Chiro Clinic" <donotreply@paydc.com>
To: jeffmurphy@gmx.com
Subject: Boston Chiro Clinic office visit

Dear Jeff Murphy,

Welcome to Boston Chiro Clinic! We are excited to have you as a patient.

In preparation for your first visit to our office, please complete your new patient intake form online. This information will help us to better understand your needs and provide you with the best possible care.

Please click on the link below to access the new patient form:

<https://staging2.paydc.com>

Your login username is: **jemu025527**

Your temporary password is: **chiro@3295**

Please note that your password is case sensitive and contains special characters. Copy and paste it (or type it in) into the login window without any leading or trailing spaces.

You can also use the link below to schedule an appointment:

<https://staging2.paydc.com/schedule?id=-640987602>

If you need assistance, please contact us at (778) 047-0888.

We look forward to seeing you soon!

Sincerely,
Boston Chiro Clinic



The newly created Username will be displayed in the Patient Demographics screen.

PayDC (STAGING2) - Boston Chiro Clinic (4092) - Pro PayDC - v4027

File View Forms Tools Help

Home Appointments Patient Account Find Patient Billing Eligibility Inbox KPI

Patients ☐ Show Inactive

- Monk, Thelo
- Monroe, Abby
- Monroe, Fred
- Moon, Aadira
- Moore, Demi
- Moore, Lainey
- Moore, Penny
- Morangie, Glen
- Morerats, rat r "yeluka" Jr
- Morosic, Don
- Mort, Rocky LMT
- Moura, Lucas
- Moura, Lucas
- Mouse, Mickey
- Movie, Thanos
- Mueller, John
- Mulder, Mary
- Muller, Bill
- Muller, Billy
- Muller, Bob
- Muller, Jimmy
- Muller, Joe
- Muller, John
- Muller, Matt
- Muller, Mike
- Muller, Rich
- Muller, Ricky
- munar, laxmi r "lucky" Sr
- Munchen, Bayern
- Muniz, Margaret
- Murdoch, Lana
- Murdoch, Lisa
- Murdoch, Cindy
- Murdoch, Dorothy
- Murdoch, Jessica
- Murdoch, Kate
- Murdoch, Lana
- Murdoch, Nancy
- Murdoch, Sally

Update Patient

PATIENT: Murphy, Jeff 04/01/1989

Patient ID: 25527 **User Name: jemu025527** Active Today's Date: 04/20/2023

Initial Patient Questionnaire

Identification Details (Patient)

Title First Name ** Middle Name Last Name ** Nick Name Suffix Account Number ** for required fields

None Jeff Murphy

Date of Birth ** Social Security Number Gender ** Primary Phone Number Primary Email

4/ 1/1989 Male jeffmurphy@gmx.com ☐ Send Welcome Email

Condition Related to?

The Patient's Condition is or may be Related to **

☐ Auto Accident (Occupant or Pedestrian) ☐ Accident in Someone Else's Home ☐ Other Accident ** for required fields

☐ Work-Related Accident ☐ Accident on the Premises of Someone Else's Business ☒ Non Accident

Internal Comments

Employee/Student Basic Details

☐ Patient is Employed Employer Name

☐ Patient is a Student School Name

Attorney Information

Name Phone Number

Address Email

Marital Status

☒ Single ☐ Married ☐ Spouse is Employed Employer Name

☐ Separated ☐ Spouse is a Student School Name

☐ Divorced ☐ Widowed

Health Plan

Does the Minor Patient or the Minor's Parents have Health Insurance that Covers the Care?

☐ Yes ☐ No ☒ Not Sure

Insurance Info

Click 'Edit' button to make changes Edit Print Condition Questionnaire Print Patient Info Save Patient Data Close



On logging in with the new username for the first time, the patient will reset the password.

A screenshot of a web browser showing the "Patient Portal" login page. The URL in the address bar is "https://staging2.paydc.com/Account/LogOn". The page has a blue header with "Patient Portal" on the left and "Log in" and "About" on the right. The main content area is titled "Log In" and includes a welcome message: "Welcome to the patient data entry application to efficiently speed up your upcoming appointment. For patients, please enter your username and password that you received in email after making your appointment. For providers, login to begin working." Below this is a login form with two input fields: "User Name" (containing "jemu025527") and "Password" (containing "*****"). A blue "Log in" button is positioned below the password field. At the bottom left, there is a copyright notice: "© PayDC Chiropractic Software".

A screenshot of a web browser showing the "Patient Portal" "Set New Password" page. The URL in the address bar is "https://staging2.paydc.com/Account/ChangePassword". The page has a blue header with "Patient Portal" on the left and "Log in" and "About" on the right. The main content area is titled "Set New Password" and includes a prompt: "Enter the new password and confirm." Below this is a form with three input fields: "Current password" (containing "*****"), "New password" (containing "*****"), and "Confirm password" (containing "*****"). There are two buttons, "Ok" and "Cancel", below the "Confirm password" field. At the bottom left, there is a copyright notice: "© PayDC Chiropractic Software".



The patient will then confirm the Patient name and Office name with “Ok” to log in to the portal.

A screenshot of a web browser showing the "Patient Data" form for Boston Chiro Clinic. The form is titled "Patient Data" and includes a sub-header "Patient Core Information". The form fields include Title, First name (required) (Jeff), Middle name, Last name (required) (Murphy), Nick name, Suffix (None), Birth date (required) (04/01/1989), SSN, and Driver's License. A confirmation dialog box is overlaid on the form, containing the text: "You have logged in as patient, Jeff, Murphy at Boston Chiro Clinic. If patient name or office is incorrect, click Cancel or click OK to proceed." The dialog has two buttons: "Ok" and "Cancel". A red arrow points to the "Ok" button.

Clicking “Cancel” button, will logout the user and redirect back to the Login Screen.

A screenshot of the same web browser showing the "Patient Data" form. The confirmation dialog box is still present, but a red arrow now points to the "Cancel" button. The form fields are the same as in the previous screenshot, but the "Gender (required)" field is now visible and set to "Male", and the "Marital Status (required)" field is set to "Single".



Upon successful login, the Patient name will be displayed instead of the Username.

A screenshot of a web browser showing the "Patient Main" page for "Boston Chiro Clinic". The browser's address bar shows the URL "https://staging2.paydc.com/Patient/PatientMain". The page has a blue header bar with the clinic name "Boston Chiro Clinic" on the left, a "Schedule Appointment" button in the center, and a user greeting "Hello Jeff, Murphy [Log off]" on the right. A red arrow points to the user greeting. Below the header, the page is titled "Patient Data" with the instruction "Use the form to begin entering patient details for your appointment at Boston Chiro Clinic". Under the heading "Patient Core Information", there is a form with the following fields: "Title" (a dropdown menu), "First name (required)" (text input with "Jeff"), "Middle name" (text input), "Last name (required)" (text input with "Murphy"), "Nick name" (text input), "Suffix" (a dropdown menu with "None"), "Birth date (required)" (text input with "04/01/1989"), and "SSN" (text input).



We've added a new field of "Payer ID" in the Insurance Carrier Export feature. Just click this new item in Available Fields, then the arrow button to move it to the Selected Fields to be included in your Insurance Carrier Export spreadsheet.

A screenshot of the 'Add/Edit Settings' window for the 'Insurance Carrier Data Export' feature. The window has a menu bar with 'File' and 'Help'. On the left is a tree view of settings categories, with 'Insurance Carrier Export' highlighted. The main area is titled 'Insurance Carrier Data Export'. It contains two lists: 'Available Fields (** means required)' and 'Selected Fields'. The 'Available Fields' list includes: Insurance Carrier ID, **Insurance Carrier Name, City, State (example FL, IL, TX, CA, WA, AZ), Zip Code (00000 or 00000-0000), Address Line1, Address Line2, Phone Number(555-123-1234), Fax Number, and Payer ID. The 'Payer ID' field is highlighted with a red box and a red arrow. Between the lists are buttons: 'Select All', '>>', '<<', and 'RemoveAll'. To the right of the 'Selected Fields' list are 'Move Up' and 'Move Down' buttons. Below the lists is a checkbox labeled 'Include header record' which is checked. At the bottom left are 'Export Data' and 'None' buttons. At the bottom right are 'Save' and 'Close' buttons.

Thank you for trusting us as your software vendor!

Questions? You can always ask our Service Desk.

- If you are a PayDC customer, the phone number is **(888) 306-1257**; please choose option 4 for the Service Desk.
- If you are an Advanced Provider Solutions customer, the phone number is **(855) 283-4940**; please choose option 4 for the Service Desk.
- To contact the Service Desk via **e-mail**, please use the [Contact Us form on our website](#). Please note: The Contact Us form is now secure, so you can include PHI in your description.