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**ChiroSUITE Cancellation Form :**

There may come a time when you need to move on from ChiroSUITE – it happens & we don't take it personally. There is a lot to that process & we want to make that transition is as smooth as possible for you. We have put together the following document to help answer any questions or concerns you may have and so you know what to expect immediately at transition & what to expect for the years that follow. **Please read through the entire document carefully & ask any questions you may have!**

We require completion & receipt of this form 30 days prior to your departure! It is sometimes better for you to depart over a weekend or at your year end or when the clinic is slow – so end of the month isn't always the best time for you. Just be aware that depending on that timing you may overlap your billing with your new provider. You can fax the completed form using the toll-free fax number above, scan & email the form to [help@chirosuite.ca](mailto:help@chirosuite.ca) (as there is no private info on this form), or kick it old school by throwing it in the mail to the address above (but make sure to tell us as well so you aren't reliant on mail delivery for the timing of your cancellation).

We have prepared this document to help answer any questions you may have & to outline your responsibilities at the time of transition to your new provider as well as your options moving forward accessing ChiroSUITE. Please please read through this very carefully & call to discuss anything you are uncertain of.

1. If moving to new software, we will provide you your exported data in a common format your new software company will require at NO cost. **As the owner, YOU are responsible for anyone in your clinic, inappropriately giving a vendor or other third party access to your ChiroSUITE or ChiroSUITE data file – this is a breach of the EULA and will result in legal action!**

We absolutely believe you own the data but turning over the entire data file provides them knowledge of our data structure and how ChiroSUITE works! Unlike our competitors, we will go above & beyond to provide you this data at a time that is convenient to your conversion process and do all that we can to make it a smooth transition for your clinic! With a little notice we can be available in the evenings or over a weekend to export data. If scheduling something with your new provider to import – we require 2 hours from the time we receive your data backup to create the data dump files & drop them on your computer.

2. You can have access to your ChiroSUITE data for as long as you need, but once you are no longer an active clinic there are costs associated with that access. Please carefully read through Section 8 for a list of your free options, and the options that will carry a charge for you moving forward. If you have any questions or concerns, please email/call in advance of cancelling to make sure you know what will happen moving forward.

<b>3. Clinic Name</b>	Clinic Phone Number
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<b>4. Type of Action</b> <input type="checkbox"/> <b>CANCEL</b> – Check this box if you are cancelling your ChiroSUITE Contract & shutting down your clinic or changing software.	<b>5. Date/Time you close when you want the Export</b>
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**6. Reason for Cancellation & any comments you care to share**

**7. Software you are moving to**

**8. Cancellation Additional Information – please initial each statement, sign, date & fax or scan/email to cancel your contract!**

I understand that Helpful Hints are provided on the following page(s) to help make it a smooth transition and minimize costs moving forward. I should be able to use those Helpful Hints to avoid any additional charges moving forward, but whether I follow those instructions or not, I understand that all future support required, for whatever reason, will be billed out in 20min intervals at \$50/interval\*. You have free access to the KB site & help file for free support.

I understand I will have 1 year of free use to run reports, print receipts, and perform lookups ONLY. I understand I am not allowed to create new appointments, create new billings, add new patients, or anything else that I should be using my new software for. I can receive payments against outstanding balances so that I can create proper receipts & statements for my patients – but it is recommended any long-term A/R be manually entered in our new software. I can also billing adjust & create old invoices prior to my cancellation date in case I need to cleanup a patient account before printing.

I understand that after 1 year, if I need access to ChiroSUITE for any reason, I will be charged \$25/month (yearly only for \$300) to continue usage. This usage will still be as indicated above – only to run reports, print receipts, and perform lookups\*.

I understand that after the initial conversion it is my responsibility to look at patient accounts in the new software to make sure whatever relevant information has been carried over properly. As it is dumped out at the cancellation date/time, whether the information is brought forward or not is between me & my new software provider.

If future support is needed & machine access is required, I understand that I must still meet the minimum anti-virus & machine requirements as if we were still an active clinic. This means my anti-virus must be up to date and valid to run in a business, and that my Windows operating system must be up to date as well. Before ChiroSUITE can extend keys beyond my expiry date, I will need to be running the most current version of ChiroSUITE – if an update is required then or at any time, I will be charged \$150 for the upgrade (this will be over & above any licensing costs). ChiroSUITE will only maintain 3 computers moving forward for me (including main/server), any additional computers will need to be updated by me or an additional charge may be applied.

I understand that it is my responsibility to manage my user passwords moving forward. Support can ONLY assist the data owner moving forward in resetting forgotten passwords, but we will be charged at the support rates specified above. It may contradict my governing body's rules, but I understand I can alter password requirements at any time to make this easier moving forward.

I understand that the following information will be provided to me at the time arranged in a common csv file format which can be easily opened in a text editor or Excel equivalent. The information provided will be as follows: Appts Completed/Cancelled/No Showed/Pending, Items, Patients, Patient A/R Balances, Patient A/R Details, Patient Credits, Patient Families, Patient's Last Appt Statistics, Patient Payors, Prac Preferences, SOAP Comments, SOAP Overview, Practitioners, Price Levels, Receipt Types. Although all this info will be dumped, I will have to speak with our new software provider to determine what will be imported.

I understand that if I am using any paperless features (patient images, documents on patient files, SOAP Notes) that it will take up to 5 business days to dump this data out separately. This data is always too large to upload to my computer – so if this information needs to be dumped, an encrypted USB drive will be created & couriered down to me in those 5 business days. There is no charge for the dump, but there is a \$100 charge to cover the USB drive & courier fees\*.

I understand that all appts are dumped but I could productively request the new software provider only import in a certain number of years. You could also open the files in Excel & strip out old data on your own if you feel comfortable in Excel. Do make a backup copy of your files first as there is an additional charge to export out the data again 😊

I understand that all backups (data & patient files backup if applicable) are stopped after ChiroSUITE sends the last backups for exporting data so that the backups ChiroSUITE has are for when everything exported out. From that point, I can manually/locally backup files if desired – I will search the kb site if I require help. I know I can request a USB backup of my data at the time of export for a fee if desired. I understand you do not retain backups for any length of time during or after I cancel.

I understand that ChiroSUITE cannot remotely uninstall remote software such as TeamViewer & AnyDesk. Once I am no longer using ChiroSUITE, these applications are no longer required & I SHOULD be uninstalling them from every machine for security safety! Also, any computers I no longer wish to use ChiroSUITE on I can simply uninstall as any other Windows program does.

I understand that as of my cancellation date, I will no longer be able to email directly out of ChiroSUITE. This will include mass emails, reminders, or even receipts. You can generate receipts to PDF & then use your existing email program to email the patient from there or generate mailing lists to capture clusters of email addresses to use in other systems. Email in ChiroSUITE will be disabled completely.

\*Prices are subject to change.

\_\_\_\_\_  
Clinic Owner Printed Name

\_\_\_\_\_  
Clinic Owner Signature

\_\_\_\_\_  
Date

## Helpful Hints

After you get up & running on your new software, there are some things that you want to do in ChiroSUITE to make sure you don't have issues moving forward or need to pay to use ChiroSUITE!

**Verify Your Data** – once you are using your new software, please make the effort to look for specific information in your new software to make sure it was brought over. There isn't much you can do 9 months down the road when you stumble across the fact that some piece of information wasn't carried forward.

**User Passwords** – once you are not logging into ChiroSUITE every day you will forget your logon info at some point. You can adjust your password rules through Utilities -> Users -> User Password Requirements. The rules by default are setup to appease governing bodies, but you can change the rules to make it easier moving forward. You can set password requirements, set or remove periodic password expiration, or allow yourself to reuse passwords. Please understand your governing body requirements before making changes. If you are not relaxing the rules then please take measures to make sure your passwords are memorable when you aren't in for months on end. Password recovery assistance will be billed at regular support rates!

**Data/File Backups** – due to private patient information, we do not keep backups for any real length of time at Sunbaked Software. As an inactive clinic, make sure you received your last backup on a USB device or that you are backing your files up locally. When you call in 9 months that your computer has crashed, we will not be able to recover data for you.

**Private Patient & 3<sup>rd</sup> Party A/R** – we dump out A/R for you to import into your new software as totals only. We do also dump out a detailed file that includes more details about the item that is outstanding if that makes it easier moving forward for you. Either way, some A/R is more long term – those items should be entered into your new system (if they were not imported) so that you have an avenue to collect those funds long term into the future. Make sure you have invoices, statements, or information entered into your new system so you can provide the billing parties what they need at some point in the future!

**Balancing After the Conversion** – Immediately after you get up & running in your new system you should be running an A/R Report out of both systems & balancing them so that you can be confident in your new system moving forward.

**Receipts / Statements** – these are more difficult to plan for as you may not have a patient request a statement for years to come. You will either have to accept paying a minimal fee for access to ChiroSUITE for years to come or you can take some steps to help minimize that need. Create a sign on your desk to indicate that patients only have until a certain date to request receipts/statements before your conversion date or you may have an idea of what patients will need receipts/statements and print them ahead of time to put in their chart or save as a PDF.

**Free Help Available** – Once you are cancelled, any support you need will be charged. You will still have access to the KB site for free articles (or in more current versions, the F1 key to open a local KB). You will also have free access to the ChiroSUITE Help Videos (Help -> ChiroSUITE Help Videos). Any of this access may change in the future without warning.

**Reports** – Like the A/R, you may need reports out of ChiroSUITE to help you confirm the data in your new system – payors for example, or a specific set of patients, or something like that. Make plans ahead of time for what information you will want to verify & find those reports in ChiroSUITE before you are cancelled. Use the Reports -> Report Finder to help you find a report you don't use often if needed.