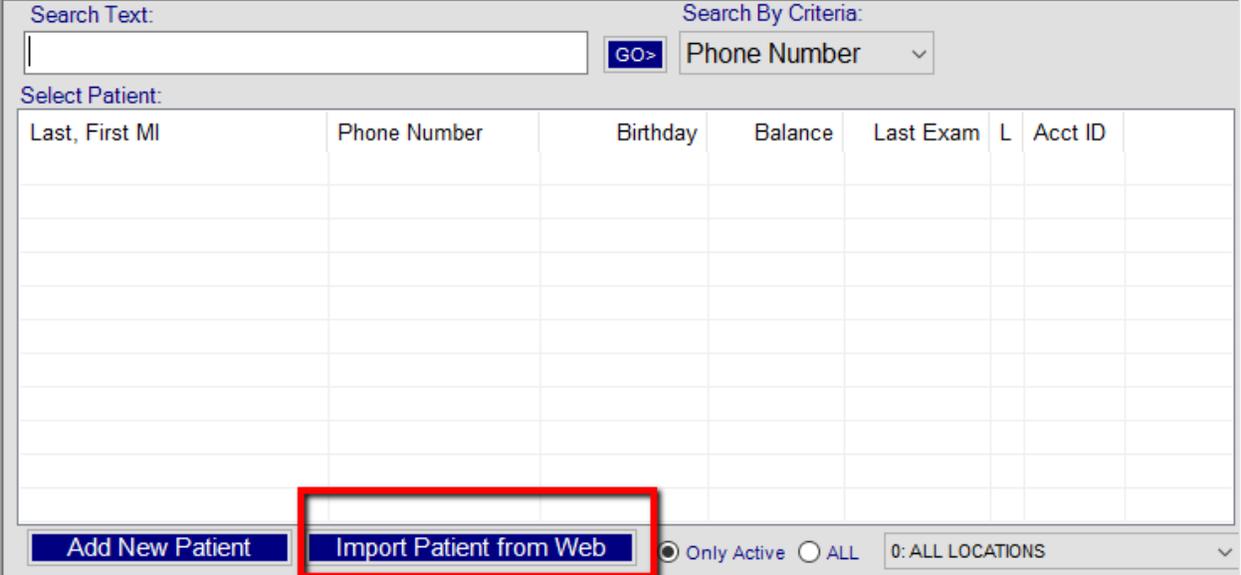


Importing Submitted Forms

****It is recommended you do not import the patient form until the patient comes in for their exam. Crystal creates a medical record for the day it was imported, so if their exam is on a different day then you will have a record with an incorrect date. It also eliminates the need to delete a patient record if the patient did not come in for their exam after you have imported their forms. ****

(You can access the link to your online forms by going to Admin, then Website in Crystal.)

Double click on the Patient tab in Crystal to bring up the Search for Patient Box.



The screenshot shows the 'Search for Patient' interface in Crystal. At the top, there is a 'Search Text' input field and a 'Search By Criteria' dropdown menu set to 'Phone Number'. Below this is a 'Select Patient:' section with a table. The table has columns for 'Last, First MI', 'Phone Number', 'Birthday', 'Balance', 'Last Exam', 'L', and 'Acct ID'. At the bottom of the interface, there are two buttons: 'Add New Patient' and 'Import Patient from Web'. The 'Import Patient from Web' button is highlighted with a red rectangle. To the right of the buttons are radio buttons for 'Only Active' and 'ALL', and a dropdown menu for '0: ALL LOCATIONS'.

The Import Patient from Web button is where you will find all of the submitted forms that haven't been imported into Crystal yet. Once you click this button, another box will appear, listing the patients that have finished their forms.

Date	Patient	Account ID	Passcode
8/20/2015 9:00:09 AM	test, test	0	
1/27/2016 3:33:14 PM	test, test	0	

Double click row to view submitted data Only Modified

Double click one of these patients, and another box will appear, listing all of the information that the patient has submitted in their form. ***If something is not in those pages, they did not enter it on the online forms.***

Label	Website Values	Updated Values
Title		
First	test	test
Middle		
Last	test	test
Suffix		
Nickname		
Address 1	12345 main	12345 main
Address 2		
City	austin	austin
State	TN	TN
Zip Code	78726	78726
Sex		
Home Ph	(512) 555-1212	(512) 555-1212
Work Ph		
Other PH		
CellPhone PH		
Pref Contact		
SS#		
Birthday		
Marital Status		

The boxes at the bottom are how you will import this information. If this form is from a patient already in the Crystal system, click 'Patient Already Exists'. A search for Patient box will appear, and you will choose the patient the form needs to be imported into.

If it is a new patient, click Create Patient, and a new patient profile will be created with the information.

If this patient form is somehow a duplicate, and the information has already been imported into Crystal, you can hit the Delete Patient button and the info will be deleted.

Generating Passwords for Existing Patients

The easiest way to give patients their passcode is when they call to schedule their exam. Creating a passcode takes seconds!

If an existing patient calls to make an appointment, and they have already filled out their medical history, you can generate a password for them to plug in on the online form website so they can edit their records without having to repeat information that's already in Crystal.

To generate a password, go to that patients profile in the Patient tab, then go to Files.

Near the bottom, on the left hand side, you will find a button labeled 'Online Registration Form'. Once you click this, a box will appear.

The screenshot shows a software interface with a top navigation bar containing icons for Patient, Billing, Tasks, Schedule, Inventory, Reports, Records, and Admin. Below this is a secondary bar with buttons for Change User, Time Clock, Logout, and Close. The main area has a tabbed interface with 'Files' selected. A table displays file information:

Date	Filename	Type	Description
05/14/2014	2014_05_14_12_05_13.pdf		Last page of BAA - Dr. Abe

Below the table are several buttons: Add File, Add Printed, Add Scanned File, Print Address Label, Create CCD or CCR, Send Office Document, Show Patient Log, Print Billing Label, Show Tasks, Email Office Document, Online Portal (Add/Remove Files), Print Folder Label, and Email Portal Access. A sub-panel titled 'Online Patient Forms' contains a 'Pass Code' input field, an 'Expiration' dropdown set to '3 hours', and buttons for 'Update Website', 'Set Pass Code to Last + Acctid', 'Set Pass Code to Email', 'Set Pass Code to SSN', and 'Set Random Pass Code'.

The buttons on the right side of this box are the different password options. Whichever you choose is completely up to you and the patient, however, **it is recommended that you use the Last Name and Account ID option, as it is the most secure.** The first will set the password to their last name and their account ID, the second will be the email on file, the third is their social security number, and the last will generate a completely random number passcode. Once you click on one of these options, the generated password will populate in the text box on the left hand side.

Online Patient Forms
Pass Code
info@crystalpm.com
Expiration
3 hours
Update Website
Set Pass Code to Last + Acctid
Set Pass Code to Email
Set Pass Code to SSN
Set Random Pass Code

Below this text box is where you can choose the expiration for this password. The expiration should be set to give the patient ample time to submit their forms before their exam date. It is recommended that the expiration does not exceed 1 month, as a security measure. Once you have the desired password and expiration, and have given this password to the patient, click “Update Website” to activate the password. This text box will disappear and you will be finished. The passcode can only be used to submit the forms once. You will need to go through the same process (the password CAN be the same password previously used) to make the password active again.

Please email any questions/comments/concerns to onlineforms@crystalpm.com