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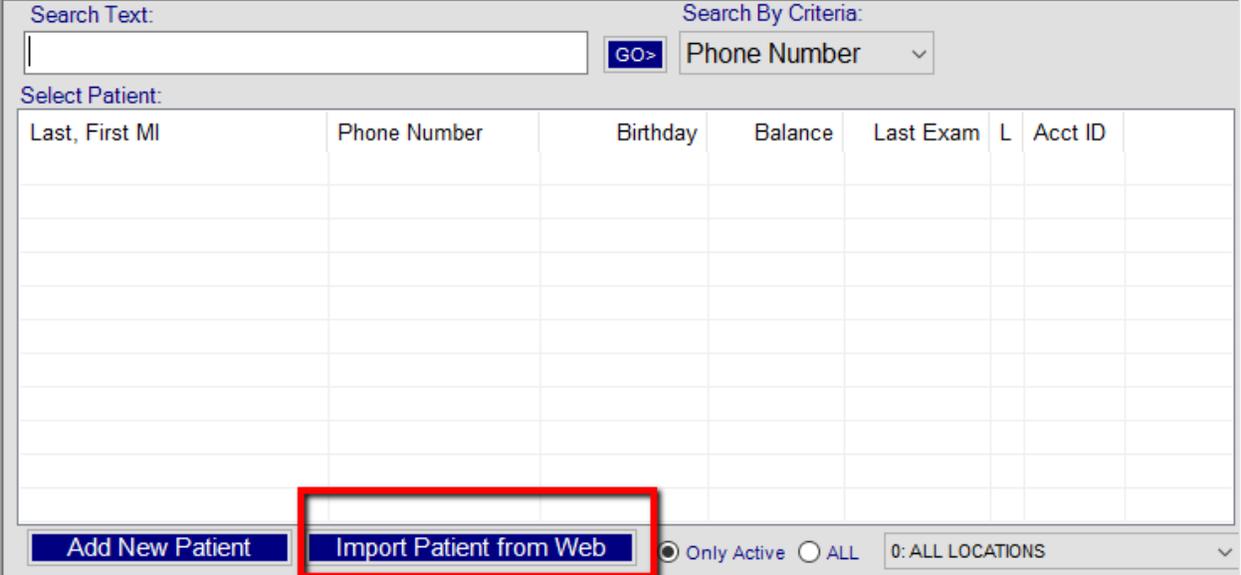
**It is recommended you do not import the patient form until the patient comes in for their exam. Crystal creates a medical record for the day it was imported, so if their exam is on a different day then you will have a record with an incorrect date. It also eliminates the need to delete a patient record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

Patient View Changes

Patient | Medical History

Label	Website Values	>	Updated Values	clear
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		>		

Patient Already Exists | Create Patient | Delete Patient

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 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.

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