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Forms

We system deliver two forms, Face Sheet and ABN. As a cloud based PM, the use of paper forms is not part of our recommended workflow. If you find you do need to use print forms, this document for your use.

Forms can be printed from the Patient Dashboard, Scheduling page, and Encounter Dashboard.

You may create or maintain additional forms by purchasing and using a PDF Creator tool. These tools may be referred to as a writer *or editor*.

We have had success using the product Nuance PDF CreatorPro, but any software that allows you to edit or write a PDF will work. There are a lot of videos on YouTube on how to use specific PDF writer software. In addition we have a video in our Help Center > Mapping Forms

- 1. Create or Edit a Document
- 2. Use a PDF converter
 - a. Add fields from 'mappable field' list to any part of the document to populate data from the PM
- 3. Save the PDF
- 4. Upload the PDF, choosing from where the form should print

Create, Edit the Document

- 1. Create the form, typically done in MS Excel or Word
- 2. Save form as a PDF document (.pdf only)
- 3. Open the PDF in Nuance PDF Converter or another PDF Editor



List of Mappable fields

This is a list of all fields available to map onto a form.

- 1. Libraries > Forms
- 2. [Add] > [Print List of Fields]
- 3. Popup > search or download

Keep in mind some fields are

specific to the page you print from, for instance, appointment mappings will not print on a Superbill if it's printed from the *Patient Dashboard*.

Mapping Documents using a PDF Editor:

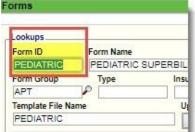
These instructions are specific to Nuance PDF, but all PDF Editors support similar functions.

- 1. Forms > Click on Text Field Tool
- 2. Draw a field(s) by clicking and dragging the field box. Release the mouse when the field is the desired size. Releasing the mouse brings up the Text Field Properties window.
- 3. **General Tab**: Field Name = System Field ID. Example: pat.fullname for the patient's entire name to pull into the field. Note that you can also name it something that is NOT a System Field ID, if you don't want it to generate any information, but want the ability to enter data in the field.
- 4. Outline Color: Choose "No Color" (prevents a 'box' around the data on the form)
- 5. Fill Color: Choose "No Color" (prevents the field from being seen on the form just the data)
- 6. Font Size: Choose a size that will fit in the space allotted. Usually 9 or 10 works
- 7. **Font**: Any font will work
- 8. Options Tab: Alignment: Choose "Left" for most situations; Multi-Line: Allows text in a larger field using multiple lines; Scroll Long Text: Allows you to type on one line

SAVE (still as PDF) > Once you have mapped the document

Upload Form

- 1. Libraries > Forms > [Add]
 - a. **Form ID**: Short name for the doc* this name is used to link the document to specific appointment types of form group 'APT'



- b. Form Name: Name for the doc
- c. Form Group: **APT** (form will then be available in the Appointment
 - Menu), **CHG** (form will then be available in the Encounter Dashboard), **PAT** (form will be available in the Patient Dashboard). Repeat the process for each location the form will need to be used.
- d. Template File Name: Name it the same as the Form ID (this same name is also used when linking the form to the Appointment Event Types in the Charge Ticket field).
- 2. Upload Form > Choose the file
- 3. **[Save]**

| System Field ID | Description | Notes | Example Output |
|-------------------------|--|---|------------------------------|
| sys.address1 | Address 1 | To print the address correctly with or without an | 33 BEDFORD RD STE 101 |
| sys.address2 | Address 2 | address 2 field use this order: | GARDENS, FL 33410 |
| sys.address3 | Address 3 | pat.address1 pat.address2 | |
| sys.address4 | Address 4 | par.address2 pat.address3 | |
| sys.billprovider | Billing Company | * if there is one set in Default Settings | Healthcare Services, LLC |
| sys.city | City | | GARDENS |
| sys.dbid | Database number | | 61 |
| sys.ein | Practice Tax ID | | 351555926 |
| | The actual form name/url | | pdfin/650555926/mappings.pdf |
| sys.formname | | date of when the form is printed | Tuesday, 8 March 2016 |
| sys.ltoday | System Long Date (todays date) | gate of when the form is printed | |
| | System Long Date (todays date) Practice Phone | date of when the form is printed | 561 624-5555 |
| sys.Itoday | | date of when the form is printed | |
| sys.ltoday sys.phone | Practice Phone | date of when the form is printed | 561 624-5555 |

| Where can I Print or View Forms? | Patient Dashboard | | |
|---|-------------------------|-----------------------|--|
| Patient Dashboard | THE Demographics Edit[C | tri-F2 Forms Co | |
| Patient > Choose specific Patient > Click 'Forms' | Patient Name | Today < 3 | > >> Thursday |
| > Select Form from Drop Down > Run | | - 08:00 Phone | et d'area es |
| Appointment Dashboard | | - AM | (Additional Profiles Exist) |
| Scheduling > Calendar > Click a Patient's Appointm | nent > | - 08:20 Date: | 01/03/2019 Til Ictions: These are the Appointmen |
| [Print Ticket] OR [Print Form] > in popup > Select F Run or simply print | Form from Drop Down > | - 08:40 Status | s: SCHEDULED [S] |
| Encounter Dashboard | | - 08:50 | |
| Encounter Dashboard > [Charge Forms] > Select F [Run] | Form from Drop Down > | - 09:00 AM APPT | t Appointment Patient Dashboar t Ticket Edit Demographi t Schedule Insurance Manag t Form Recalls |
| Encounter Dashboard ? | Patier | nt: <u>3856</u> | Encounter: 66737 |
| Actions Modify Charge Change Claim Status | Print Claim | | Charge Forms |

Linking Form to Appointment Event Types

Take this step to print Tickets (superbill, fee ticket or encounter form) from the calendar. If the form is APT (appointment) and linked to a 'Type', it's available on the Scheduling Dashboard to print, in batch form. Otherwise, it is available from the Appointment > Print Forms.

(2)

(

If this form is always used for all Resources (3): This is the most frequently used option

(?) Description: PEDIATRIC OFFICE VISIT

2 ad Form: Choose File No file chosen

(?)

Text Color:

| Filter Criteria Clear 📓 👜 — | | | |
|-----------------------------|----------------------|-------------|------------|
| | eld By SELECT - V | Description | Include In |
| P Search | | | |

Modify Appointment Types

ackground Color:

Save [F2] 3

Type: PDOV

Charge Ticket: PEDIATRIC

1. Add or Edit the Appointment type

2. Type in the Form ID in the Charge Ticket field *Form ID you used when uploading the form to the Library, in our example 'Pediatric'

3. [Save]

If you have multiple appointment forms, and they are specific to one or more resource (2):

From Scheduling > Resources -this presumes you have already added appointment types

1. Add or Edit the Resource

2. Type in the Form ID in the Charge Ticket field *Form ID you used when uploading the form to the Library, in our example 'Primary' 3. [Save]

If you have multiple appointment forms, and they are specific to a Resource/Appointment Type combo (1).

| | Types ? | | <u> </u> | Re |
|---|--------------------|----------------------------------|----------------------|--------------------|
| Filter Criteria <u>C</u> lear <u>Resource ID</u> P Search | Ivpe SELECT - ▼ | <u>N</u> ame MAS | Facility - SELECT | |
| CAdd Dejete Resource ID 2145 | Person | Туре | MASON | Nar |
| ananana a | | dd/Modify Resou <u>T</u> ype: | | (7) |
| | | <u>A</u> bbreviation: | (?) | <u>N</u> an |
| | | Provider: | |) Effe <u>c</u> ti |
| | ve (F2) | | | Upload F |

From Scheduling > Resources - this assumes both appointment types and Resources are built

- 1. Click > Appointment Type
- 2. 'Linked Appointment Type' popup > Click > Appointment type
 3. In the ' Add/Modify' Linked appointment type popup > Type in the Form ID in the Charge Ticket field
 4. [Save]

| Types | Statuses ? | Y | Build ? | × |
|---|--|-----------|----------------|--------------------------|
| er Criteria Clear 🔐 🔕 source ID Type - SELEC* | Linked Appointment Types | [P145] | _ | |
| Search | Type Description Form | | | |
| Add T Dejete | P Search | | | age Size: 500 • 1-1 of 1 |
| 5 Resource ID | Link Unlink Unlink All | Page Size | 500 ¥ 1-1 of 1 | Appointment Types |
| | Appointment Type Descri PDOV 2 PEDIATRIC OFFICE | | Form | |
| | | | × | |
| | Add/Modify Linked Appointment | Туре | | |
| | | T [PDOV] | | |
| | Duration: 15 | | | |
| | Charge Ticket: PEDIATRIC | | | |
| | Ugload Form: Choose File No file ch | osen | | |
| | Save [F2] 4 hcel | | | |
| | | | | |

Logic for batch printing Charge Tickets: first most specific linkage, meaning, we look to the 'Linked Appointment Type' on the Resource (1), if this blank, then we look to the Resource (2) if this is blank we look to the basic building block of 'Appointment Type' (3).

Printing Tickets

Tickets are sometimes called Encounter Forms, Fee slips or Superbills

Print a PDF batch of Tickets

- Choose the Date, Providers & Locations you desire, all appointments on the screen will be in the PDF
- On the second Tab > Checked In/Reports > [Tickets]
- 3. In the popup > Print dialog > Print

| , . | TRAINING PRACTICE [SDEMO-02] | webinar | |
|-----|-----------------------------------|-----------|---|
| , | Ctrl+Ctrl Go! Scheduling Dashboar | <u>'d</u> | |
| | Display Profile | Today < > | > Monday 02/06/2017 V Appointments: 18 |
| | Default • 3 | | CHESNEY (18) |
| | | | @ MAIN OFF (18) |
| | (🗃 Y 💆 Y Q Y 🌩) | - 08:00 | |
| S | Checked In | - NP | |
| | Patient Time | - 08:10 - | 🗾 multi6557092564260537619.pdf - Adobe Acrobat Reader DC |
| | Reports | - NP | File Edit View Window Help |
| | Tickets 2 | - 08:20 | Home Tools ropenfil × opm 47 |
| | Schedule | - 152W | Home Tools ropenfil × opm_47 |
| | CAQ | - 08:30 - | |
| | | - APPT | |
| | | - 08:40 - | |
| | | - APPT | Puler Wometon Appdistant Wometon Boots |
| | | - 08:50 | APPORTMENT DOWNTRY MAKE THIN AND UPE INFO O |
| | | AM | BUE CRORE HELD |
| | | - APPT | Provide Hax KE (#+2501947) Provide Hiteration Fridament Viat |
| | | - 09:00 - | |
| | | - APPT | Office study, New Falance 1990 Officer visitie, Lenni 2 Jakes Die Aus Sta D 7046 Auto, 3 Vision |
| | | 00-40 | 9000 Office visit, Level 3 12330 ff: Versions 40 71111 MDer, 5 viset, 1232 MD20 Office visit, Level 4 2340 ff: Claracia 40 71118 a.c. or |

Print a Ticket or Form for an individual patient's appointment

Patient's Appointment > 'Print Ticket' or 'Print Form' for other forms

| 11 | Phone: H: (330) 473-7512 W: 330-6855 Address: 4835 Darrow Rd. Stow, OH 44224 Insurance: [1]-WK [No Effective - No Expiration] |
|-----|--|
| | instructions. Reason. |
| 111 | Status: [SCHEDULED [S] V Check In Cancel Reschedule Delete New Appt To Worklist |
| 111 | Edit Appaintment Patient Dashboard Enter Copyr Patient (\$0.00): ® Guarantor (\$0.00): 0 Print Taket Edit Demographics Enter Copyr Pat Bat 0.00 Last Payment: 11/28/2016 |
| 11 | Pret Schedule In Priet Form Re CLOSE Report |
| 111 | |

How to prevent an Event Type from printing:

Appointment Type: Leave the 'Charge Ticket' Blank or Do not require a Person ID (such as Lunch or Block)

| | | Resources (?) Y | Slots | (?) ĭ | Statuses (?) | Ĭ. | |
|--------------------------------------|-------------|------------------------|--------------|----------------------------|---------------|---------|----|
| Filter Criteria <u>Clear</u> Type | Description | | | | | | |
| Search | | | | | | | |
| | | | | | | | |
| Add Delete | | | | | | | |
| Type | | Description | | Duration (Mir | utes) | | Fo |
| <u>AP</u> | APPOINTMENT | | | 10 | | encform | |
| BLOCK | BLOCK | | | 15 | | | |
| CLOSED | OFFICE CLC | | | - | | | |
| <u>EV</u> | ESTABLISH | Edit Appointment Types | | | | | |
| ORM | FORM COM | | | | | | |
| IP. | JONES PT | Type: BLOCK (?) | Description: | BLOCK | Duration: 15 | | |
| AB | LAB | | | | | | |
| ИTG | MEETING | Background Color: | Text Color: | (?) | Cancel Color: | (?) | |
| | NEW PT AP | Charge Ticket | | Choose File No file chosen | Recall Form: | | |
| VP | | | | | | | |

How do I pull data to print a Label?

We have three Custom Queries you can use to generate data to export to CSV. Once you have that information you need, use mail merge to print to your local printer or label maker. We have found this article helpful > <u>Microsoft Print mailing labels</u> **See our Help Center > Videos > Patient Query**

System Default Setting for Tickets

Go to Admin > System Default Setting > Scheduling Ticket_Sort > To control if the Tickets print in Time Order or by Resource in Time Order. The default is by time.

| Scheduling Dashboard > Calendar > Admin | | | | | | |
|---|--|--|-----------------|----------|--|--|
| System Default Settings | | | | | | |
| | 10.10 | | | | | |
| Category | 16:40 (?) | | | | | |
| General | FACONAPPT - APPOINTMENT SPECIFIC FACILITY | | | | | |
| Charges | | | | | | |
| Patient Payments LISTDATE - DATE USED IN APPT LIST FILTER | | | | | | |
| | | | Reference Batch | ···· (?) | | |
| Reports | | | | | | |
| Scheduling | OFFICEPHONE - PHONE NUMBER DISPLAYED AT THE BOTTOM | | | | | |
| Statements | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | TICKET_SORT - SPECIFY ORDER OF PRINTED TICKETS(L) | | | | | |
| | (?) | | | | | |
| | 9 1 Time | | | | | |
| | Resource,Time TMENT LENGTH | | | | | |
| | 10 (2) | | | | | |