Forms	1
Create, Edit the Document	1
List of Mappable fields	2
Mapping Documents using a PDF Editor:	2
Upload Form	2
Where can I Print or View Forms?	3
Linking Form to Appointment Event Types	3
Printing Tickets	4
Print a Ticket or Form for an individual patient's appointment	5
How to prevent an Event Type from printing:	5
How do I pull data to print a Label?	5
System Default Setting for Tickets	5

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:

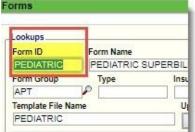
These instructions are specific to Nuance PDF, but all PDF Editors support similar functions.

- 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)					