TASK: USING FORMS ~ MAPPING

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Forms

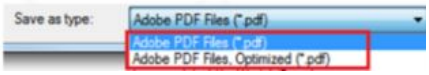
We system deliver two forms, Face Sheet and ABN. As a cloud based PM, the use of paper forms is not part of our recommended workflow. If you find you do need to use print forms, this document for your use.

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

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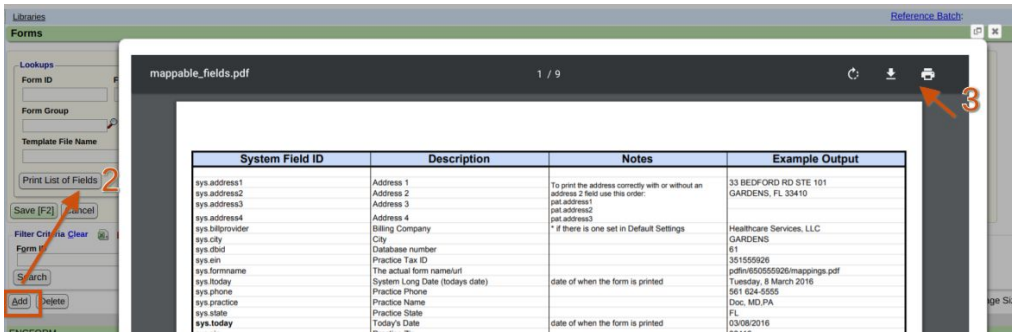
List of Mappable fields

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*.

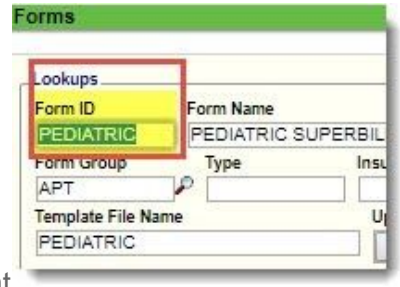
Mapping Documents using a PDF Editor:

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]**

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Where can I Print or View Forms?

Patient Dashboard

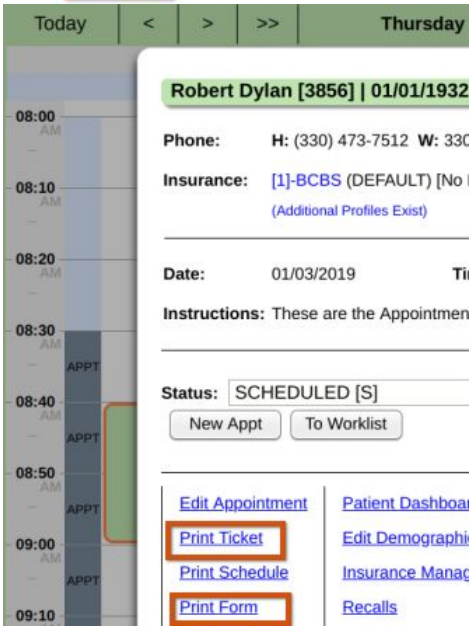
Patient > Choose specific Patient > Click 'Forms'

> Select Form from Drop Down > Run

Appointment Dashboard

Scheduling > Calendar > Click a Patient's Appointment >

[Print Ticket] OR [Print Form] > in popup > Select Form from Drop Down > Run or simply print



Encounter Dashboard

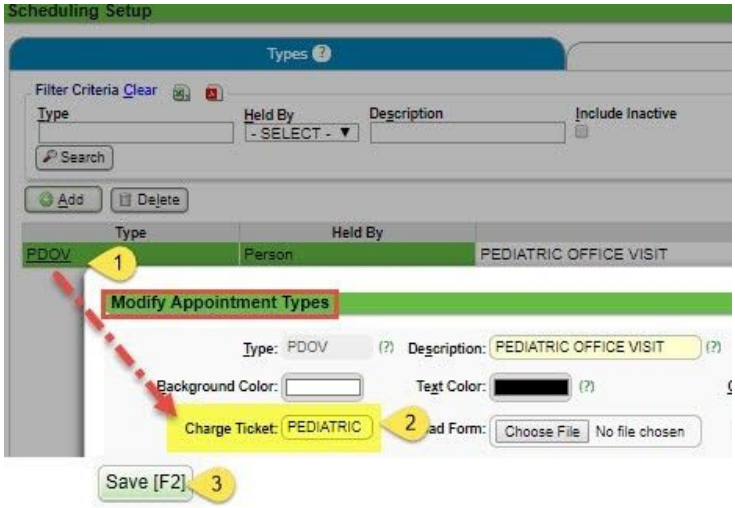
Encounter Dashboard > [Charge Forms] > Select Form from Drop Down > [Run]

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.

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

Scheduling > Schedule Setup > Types



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]

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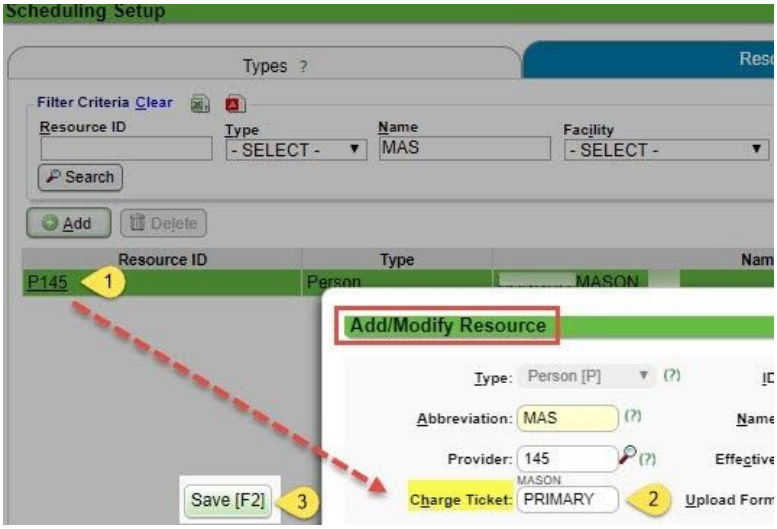
If you have multiple appointment forms, and they are specific to one or more resource (2):

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

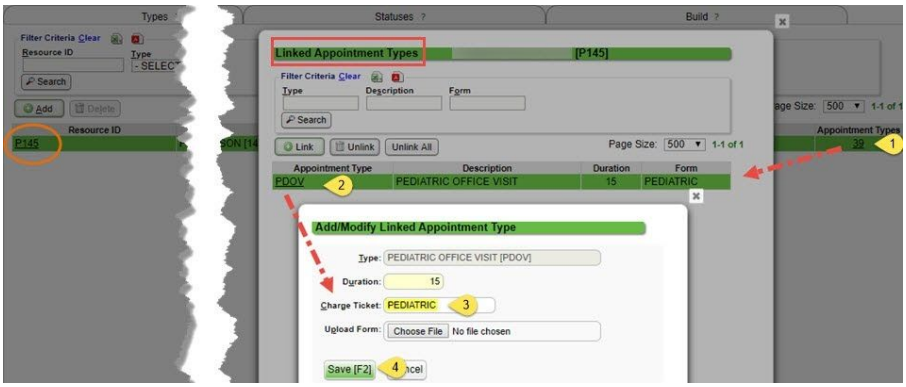
1. Add or Edit the Resource
2. Type in the Form ID in the Charge Ticket field *Form ID you used when uploading the form to the Library, in our example 'Primary'
3. [Save]



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

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]



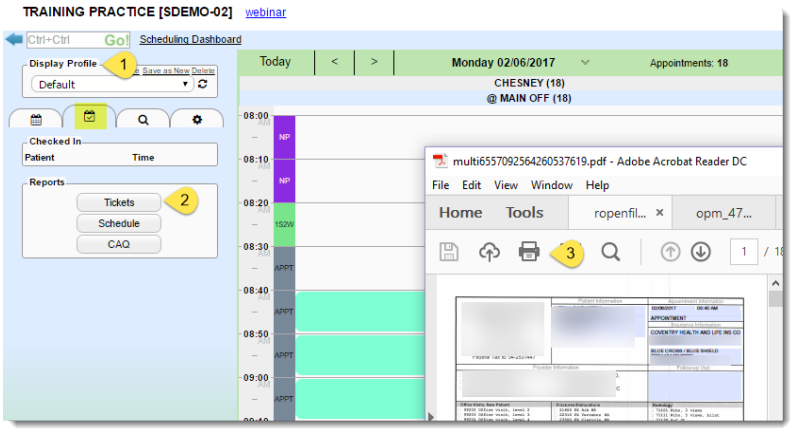
Logic for batch printing Charge Tickets: first most specific linkage, meaning, we look to the 'Linked Appointment Type' on the Resource (1), if this blank, then we look to the Resource (2) if this is blank we look to the basic building block of 'Appointment Type' (3).

Printing Tickets

Tickets are sometimes called Encounter Forms, Fee slips or Superbills

Print a PDF batch of Tickets

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



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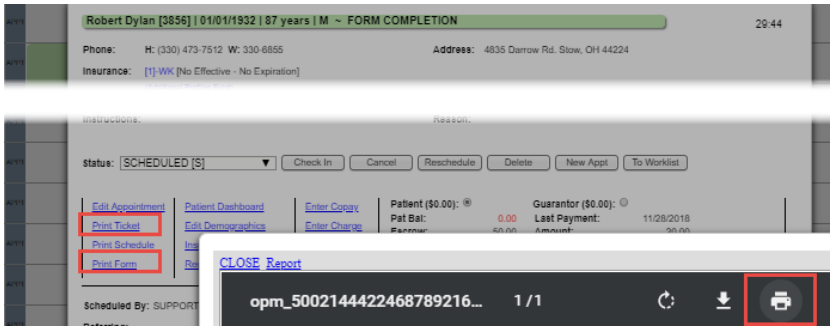
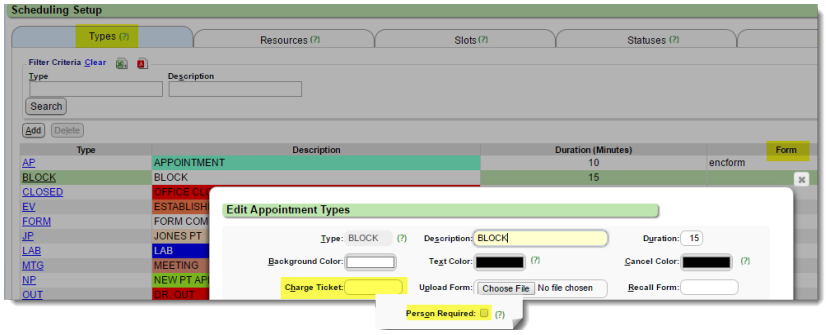
Print a Ticket or Form for an individual patient's appointment

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



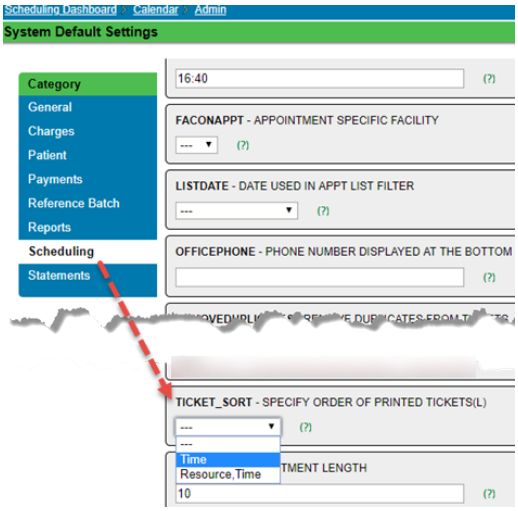
How to prevent an Event Type from printing:

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



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 > Microsoft Print mailing labels **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.