

Mapping a Document Using Excel, PDF Editor and Loading it into OpenPM

EXCEL (Editing the Document):

Open the document in Excel and edit the document as needed 2. Save Spreadsheet as a PDF document Open PDF in Nuance PDF Converter or another similar PDF Editor Software.

Mappable Fields List

Libraries > Forms > Add > Print List of Fields

Mapping Document using NUANCE PDF CONVERTER (or other PDF editor software):

1. Forms > Click on Text Field Tool. 2. Draw your field(s) by clicking and dragging the field box. Release the mouse when the field is your desired size. Releasing the mouse brings up the Text Field Properties window.
2. General Tab: Field Name = What you would like this field to generate. Example: You want the patient's name to generate in the field. Use "pat.fullname " for the Field Name. You can name it Text1 if you don't want it to generate any information, but want the ability to type in the field.
3. Outline Color = Choose "No Color"
4. Fill Color = Choose "No Color"
5. Font Size = Choose a size that will fit in the space allotted. Usually 9 or 10 works
6. Font = Choose a font that will work
7. Options Tab: Alignment = Choose Left for most situations Multi-Line = Allows you to text in a larger field using multiple lines, instead of just one. Scroll Long Text = Allows you to type on one line

SAVE Once you have mapped the document, save it.

Upload

OpenPM (Uploading the Document): You may need to add this form to multiple locations, therefore you may need to do this process multiple times.

1. Go into OpenPM > Libraries > Forms > Add
 - a. Form ID = Nickname it after the doc
 - b. Form Name = Name it after the doc
 - c. Form Group = Use either APT (form will then be found in the Appointment Menu), CHG (form will then be found in the Charge Dashboard), PAT (form will then be found in the Patient Dashboard). You may need to add this form to multiple locations, therefore you may need to do this process multiple times.
 - 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**

OpenPM (Linking Form to Appointment Event Types)

1. Go into OpenPM > Scheduling > Schedule Setup > Choose an Event Type (PID should say Y) by clicking on the blue Event Type hyperlink
2. Charge Ticket field = Use the Template File Name you used in the Form set up in OpenPM, and type it into the Charge Ticket field. NOTE: Name must be lowercase and formatted as name.pdf
For example: familysuperbill.pdf
3. Upload Form = Choose the file
4. Save
5. If you test one Event Type and it works you can copy and paste the name of the Charge Ticket into all other Event Types that will use the same form - no need to upload each time, as long as the Charge Ticket field is filled out.