



Objectives & Goals – Form, Document & Letterhead Setup

- Create Document Categories
- Create Document actions
- Set Office Letterhead
- Create & Edit Letter Templates
- Create Forms to be Signed
- Create Forms to be Filled

Hot Keys

F4 - Open Data Entry (Edit) Window

Ctrl + N - Add a New record

Ctrl + E - Edit a record

Ctrl + L - Cancel a record

Ctrl + H - Search a record

Ctrl + F5 - Refresh

F5 - Open Search Window

Ctrl + Del - Delete a record

Ctrl + S - Save a record

Ctrl + R - Retrieve all records

Ctrl + T - Sort

The following Short cut keys are for Report Options:

Ctrl + R - Retrieve (records)

Ctrl + I - Print Preview

Ctrl + D - Report Design

Ctrl + T - Sort

Ctrl + G - Page Setup

Ctrl + P - Print

Ctrl + Z - Zoom

Ctrl + M - Mail Merge

Create Document Categories and Sub Categories

Create Document Category from the Setup Menu

Click on Setup>>Other>> Document Category

The system already has some predefined Categories.

Click the Option Button to add New Categories or Sub Categories or edit current ones.
Selecting this Option to add or edit will bring the user to the following windows:

NOTES:

Document Category:

Document Category

Description*	Type	Seq. No.	Active	Note
1. GENERAL	Other	1	<input checked="" type="checkbox"/>	
2. LABS	Lab	2	<input checked="" type="checkbox"/>	
3. NURSING H	Other	3	<input checked="" type="checkbox"/>	
4. PROCEDU	Other	3	<input checked="" type="checkbox"/>	
5. RAP		5	<input checked="" type="checkbox"/>	
6. CA		7	<input checked="" type="checkbox"/>	
7. PU		8	<input checked="" type="checkbox"/>	
8. PR		9	<input checked="" type="checkbox"/>	
9. REFERRALS	Other	11	<input checked="" type="checkbox"/>	
	Other	13	<input checked="" type="checkbox"/>	
	Other	15	<input checked="" type="checkbox"/>	
12.	Bill			
13. ANCE	Insurance			
14. CHART	Personal	2		

Sub-Category Add Delete Save Close

Callouts:

- Description/Name of the Document Category.** (points to Description*)
- Select Type of the document** (points to Type)
- Click here to open "Sub-Category"** (points to Sub-Category button)
- Click on "Add" to add new document category.** (points to Add button)

Document Sub-Category

Description*	Category*	Seq. No.	Active	Note
1. AUTHORIZATION	GENERAL	1	<input checked="" type="checkbox"/>	
2. BEDI	GENERAL	1	<input checked="" type="checkbox"/>	
3. FOLLOW UP LETTER	GENERAL	1	<input checked="" type="checkbox"/>	
4. IN L CONSULT	GENERAL			
5. M AGRAPHY	OLD CHART			
6. CO PY	PROCEDURES	6	<input checked="" type="checkbox"/>	
7. ED NGRAM	OLD CHART	7	<input checked="" type="checkbox"/>	
	HART	8	<input checked="" type="checkbox"/>	
	HART	9	<input checked="" type="checkbox"/>	
	NT LETTERS	10	<input checked="" type="checkbox"/>	
	GY		<input checked="" type="checkbox"/>	
12. APPOINTMENT REMINDER	GENERAL			
13. AUTHORIZATION REQUIRED F	GENERAL			
14. BILLING LETTERS	BILLING			

Add Delete Save Close

Callouts:

- Description/Name of the Document Sub-Category.** (points to Description*)
- Select Category for the Sub-Category** (points to Category*)
- Click on "Add" to add new sub-category.** (points to Add button)

NOTES:

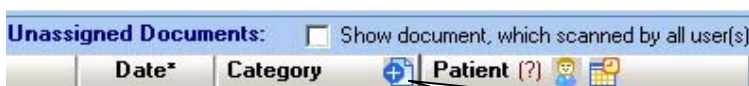
Edit From the Document Details

Document sub-category can be entered from Document Detail (Activities>Document) screen:



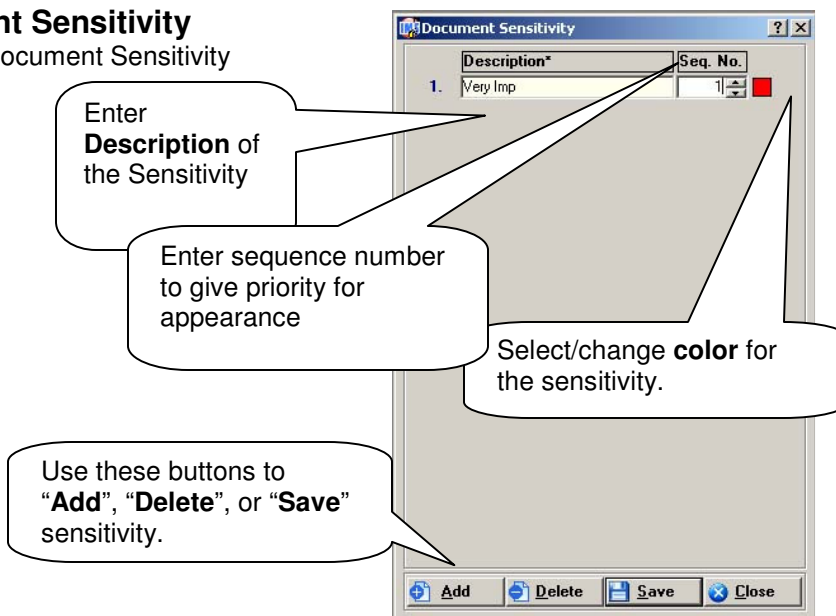
Edit From Multi-Scan/Select

Document sub-category can be entered from Multi-Scan/Select (Utilities>Multi-Scan/Select) screen:
On the Top side of left panel you can click on the icon to open Document Sub-category window.



Setup Document Sensitivity

Setup>> Other>> Document Sensitivity








NOTES:

Understand How Document Sensitivity affects IMS Documents

Once the setup of Document Sensitivity is complete, it can be assigned to a new document while sending or receiving it. Document can be sent/receive from Activities>Document.

Select
"Sensitivity"
 of the document
 from this list.

Patient* (?) Test, Bhavu (PT000000031)		Office* 00001
Category: IMAGING CENTER	Date* 03/21/2008	
Sensitivity: Very Important	Priority: Normal	
Description: Imporant VisitNote	Visit:	
Document* Received	Image File	
Certified: <input type="checkbox"/>	Track No.:	Sent By:
Received/Sent:		
From/To: Other		
Note:		
Forward To/Respond:		
Forward To:	Status:	
Resp. Req.: <input type="checkbox"/>	Respond By: 00/00/0000	
Note:		
Web Access:		
Show on Web: <input type="checkbox"/>	Notify Patient: <input type="checkbox"/>	
Sign off:		
User:	Date & Time:	
 Ctrl+F7- Add Scan/Select File  Ctrl+F8- View File  Delete Scan  Click here to Copy This Doc.		

NOTES:

When the document is opened from Utility> Patient>Document. A list of documents will appear with the background color of the sensitivity.

Patient Document(s)
Patient (?) Test, Bhavu (PT00000031)

Visit: All

S	Category	Date	Sensitivity	Description	Status	Visit	Sent/Rec
1	Visit Note	11/02/2008	General				
	FOLLOW UP LETTER (GENERAL)	03/21/2008	Low				
	HOLTER (OLD CHART)	03/21/2008	Normal				
	BILLING LETTERS (GENERAL)	03/21/2008	Low				
	Important VisitNote	03/21/2008	Very Important		Received		
	General	03/20/2008	General			03/20/2008	

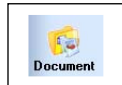
Click here to sort all documents according to **"Sensitivity"**.

List of Documents with **background color** of sensitivity.

This document's sensitivity is set as "Very Important" and **color** is set as red for the Sensitivity.



This screen can be open from Visit Note>>Document (Right panel)



And Patient Master>>Document (Right Panel)

Setup Document Action

Setup>> Other>> Document Action

Document Action

Action	Task	Category	Assign To
1. Prompt me on next visit			None
2. Prompt me on every visit			None
3. Call patient			None
4. ...			None

Select **task** to perform for the action.

Select Category among: **General, Patient** or **Telephone Consult**

Click here to Select **Employee, Group** or **Designation** to set reminder for the action.

Save Close

NOTES:

Understand how Document Action can be utilized

Open patient Document screen. This screen can be opened from

- Utility> Patient>Document or
- Visit Note>Document (Right panel) or
- Patient Master>Document (Right Panel)

Patient Document(s)

Patient [?] Test, Bhavu (PT00000031)

Visit: All

S	Category	Date	Sensitivity	Description
1.	Visit Note	11/02/2008	General	
2.	FOLLOW UP LETTER (GENERAL)	03/21/2008	Low	
3.	HOLTER (OLD CHART)	03/21/2008	Normal	
4.	BILLING LETTERS (BILLING)	03/21/2008	Low	
5.	BEDI (GENERAL)	03/21/2008	Very Important	Important VisitNote
6.	Visit Note	03/20/2008	General	

Double click on document to open into editing mode.

Test, Bhavu (PT00000031)

BEDI (GENERAL) - 03/21/2008 - Important VisitNote

Category: BEDI (GENERAL)

Description: Important VisitNote

Sensitivity: Very Important

Priority: Normal

Status:

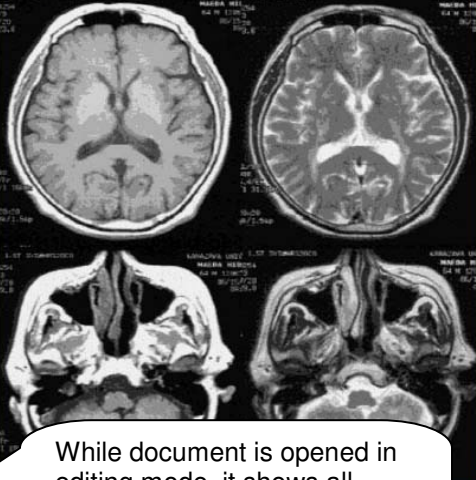
Forward To:

Note:

Sign Off User: [Click here to Sign Off](#)

Sign Off Date:

☐ Prompt me on next visit
☐ Prompt me on every visit
☐ Call patient
☐ Set appointment
☐ Send referral letter
☐ Need detail review
☐ Need consultant opinion
☐ Fax visit note(s)

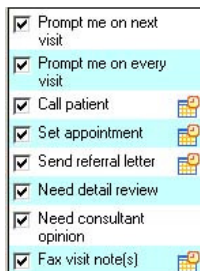


While document is opened in editing mode, it shows all **actions** that can be taken for the document.

NOTES:

By selecting the following actions a reminder window will open to set a reminder:

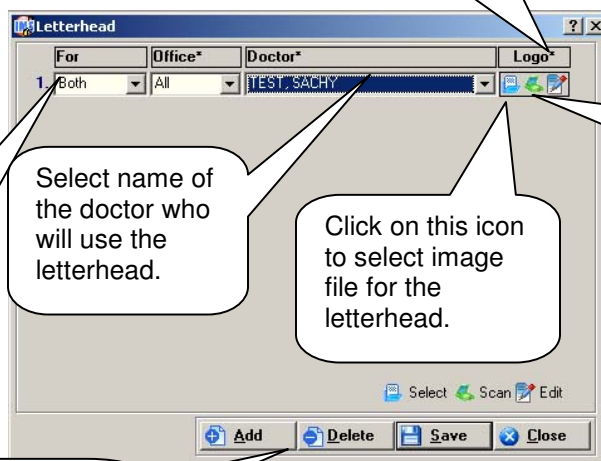
- Call patient
- Set appointment
- Send referral letter
- Fax visit note(s)



Set **Reminder** for the action.

Set your Letterhead into IMS

Setup>>Other>>Letterhead



Click on the editor icon to view the existing letterhead.

Click on icon to scan the letterhead.

Select **Visit Note, Letter** or **Both**.


Keep both if letterhead is common for Visit note and all other letters.

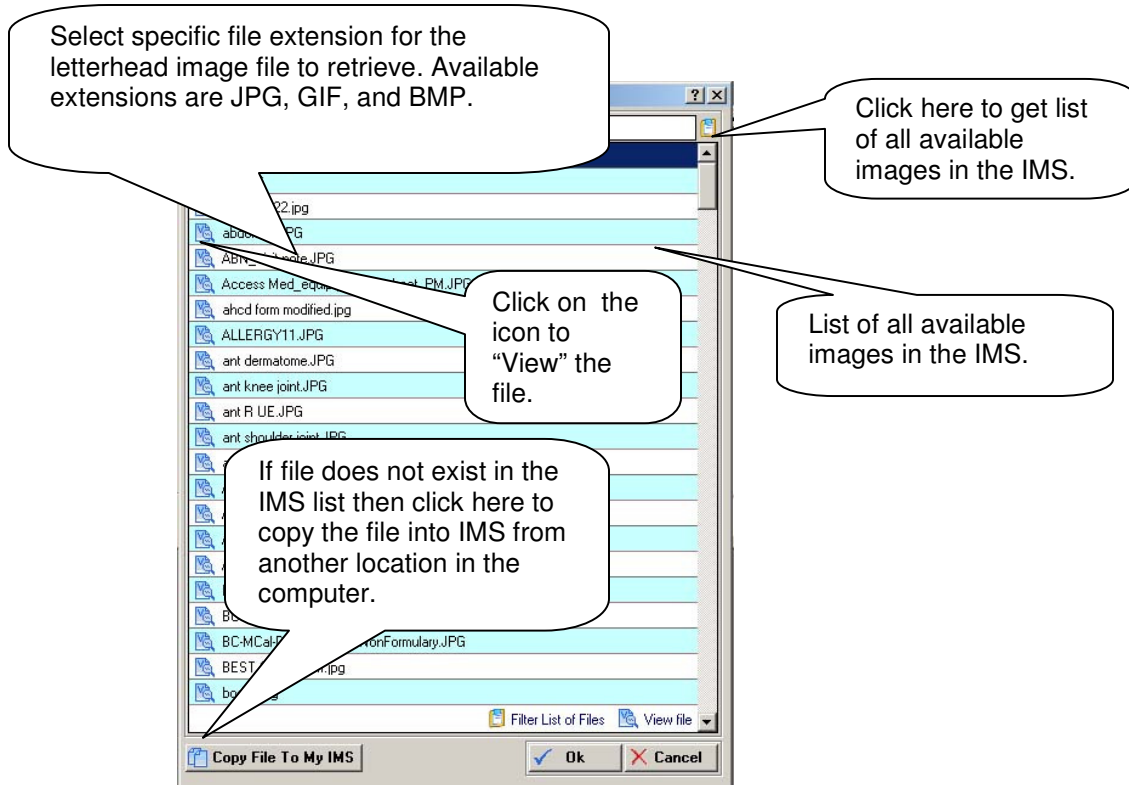
Select name of the doctor who will use the letterhead.

Click on this icon to select image file for the letterhead.

Click on **"Add"** or **"Delete"** to add/delete letterhead...

NOTES:

To add new letterhead from the image file stored in the computer click on  icon from the letterhead screen.

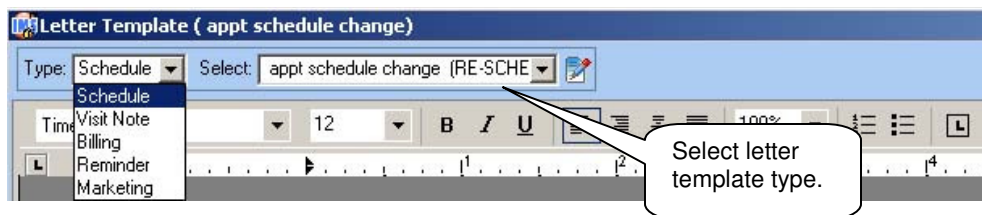


Create and Edit Letter Templates

Understand Letter Template Type and how it affects the use of the letter in IMS

Setup>> Other>> Letter Template

NOTES:

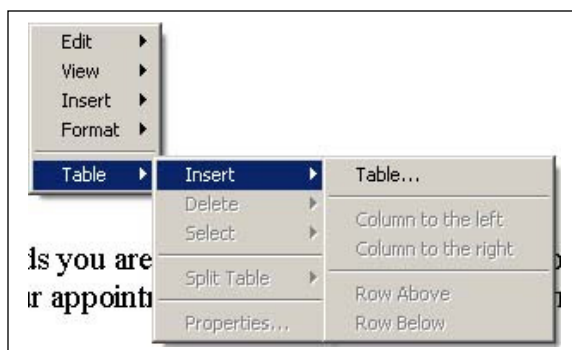


Type of Letter templates:

- **Schedule:** All letters which can be used during scheduling appointments fall under this category. For e.g. reminder letter to patient regarding next their scheduled appointment and general institution letter.
- **VisitNote:** Letters which can be used during or for Visit Note are defined in this category. For e.g. "Excuse from Work" letter.
- **Billing:** All billing related letters are defined in this category. For e.g. "Patient Responsibility" letter.
- **Reminder:** All letters belonging to reminder, alert and tasks are defined in this category. For e.g. "Overdue Immunization" letter.
- **Marketing:** Marketing related letters are defined in this category.

Insert Tables, Documents, and Pictures

Right click menu in letter template allows a user to insert various objects like Table, Document, Image or picture into the letter.



Right click menu demonstrates how to insert table in the letter template

Insertion of the objects like Tables, Documents, and Pictures are much similar to any word processing editor like Microsoft Word.

NOTES:

Insert Database Fields

The screenshot shows the 'Letter Template (SBE Letter to PCP)' editor. The interface includes a top toolbar with 'Type' and 'Select' dropdowns, a 'Letter category' dropdown, and a 'Letter type' dropdown. The main editing area contains a template with placeholders like '<LetterHead Image>' and '<Current Date>'. A 'Field List' on the right side contains a list of database fields. Callouts provide the following information:

- Letter category:** Points to the 'Select' dropdown in the top toolbar.
- Letter type:** Points to the 'Type' dropdown in the top toolbar.
- Content of the letter:** Points to the main editing area.
- Column placed here will fetch First name of the patient:** Points to the '<Current Date>' placeholder in the template.
- List of columns (Database field) to fetch real values in letter. Double click on it to place into the letter.** Points to the 'Field List' on the right.

The 'Field List' contains the following items:

- Current User
- Doctor
- Employer
- Facility
- Hospital
- List Columns (system)
- Nurse Manager
- Office
- Office Group
- Patient
- Patient Current Emp
- Patient Diagnosis
- Patient Insurance (f
- Patient Insurance (S
- Provider Group
- Referred By
- Referred To
- Sp. Columns (system)
- Carehome
- Case_Other_Ref_Dr
- Current Date
- Current Day
- Current Time
- EmailVerificationLink
- Employee
- GetSign
- Guardian Signature
- HandNote
- Hospital
- Insurance
- LetterHead Image
- MidMichigan Letterhead
- Password

NOTES:

Insert Visit Note Template items on Letter Template (Select from Template)

In Column list, select **"Select from template"** column, which is under Visit Note column list.

Double Click on **"Select from Template"** from Column List on the right side of the letter template screen to insert into letter.

Select **Template** from the drop down list.

Click on (+) sign to expand template items. Click on the **item/box** to select it.

Click on **"Select"** button to select the template.

PT/INR (Image)
 ROS
 ROS (Image)
Select from Template
 Social History
 Social History (Image)
 Sp. Procedure
 STRESS TESTS
 STRESS TESTS (Image)
 Visit Date
 Visit Procedure
 Visit Type
 Vital Signs

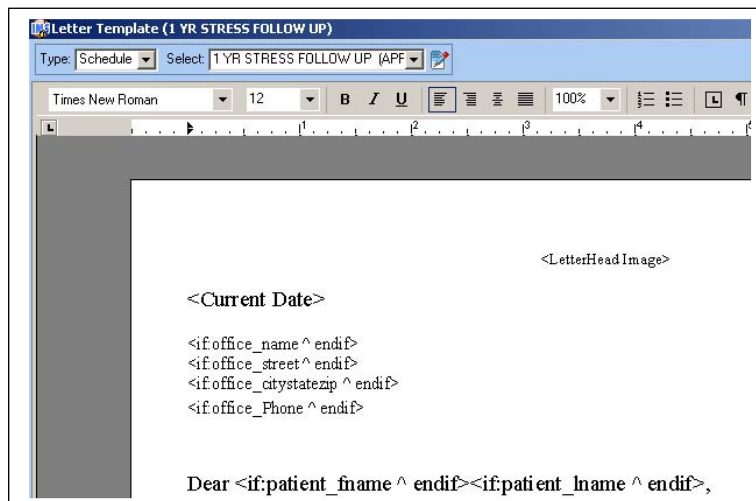
Select From Complaint
 Medtab Complaint
☐ Free Text Note
☐ HEMATOLOGY
☐ Interpreter (enter name)
☒ **Bac Tu Duong "Nicole"**
☐ Clemencia Rodriguez
☐ Eduardo Recinos
☐ Gloria Contreras
☐ Hilda Hidalgo
☐ Jesse Rossner
☐ Juan Duque
☐ Luiz Mario Silva
☐ Madhu Chadhai
☐ Martha Hiestrosa
☐ Pat Munevar
☐ Stella Hecht
☐ Steven Vario
☐ Teresita De La Pena
☐ Other
☐ Telephonic consult
☐ Visit Type
☐ Shoulder
☐ Musculoskeletal Pain
☐ Pain
☐ Bone pain
☐ Fracture
☐ Headache
☐ Joint pain
☐ Joint stiffness
☐ Myalgia
 Select Cancel

NOTES:

Use of Special Column for Letter Template

Special Columns are user defined macros. If some part of the text and/or Pre-defined columns needs to be printed again and again it can be stored in special columns (as macros).

For Example: You want to print Office Name, Address, and Phone# on the bottom of many of the letters. You can create a special column called "My Office" and place it on bottom of your letter template.



Select the set of columns for which you need to create special column

```
<if:office_name ^ endif>
<if:office_street ^ endif>
<if:office_citystatezip ^ endif>
<if:office_Phone ^ endif>
```

Press F6 , New window will open and you can specify name of the Special column

Dear <if:patient_fname ^ endif>

According to our records you have no limitations of the test, it appears



Special columns appear in Sp. Column (system) list.



NOTES:

How to Create List Columns for Letter Template

Press F7 key on your keyboard to open List Columns window.

Enter name of column

Select Conjunction as per requirement

Enter value of the list.

Click on "Add" to add new List Columns.

Click here or Press F11 to add new row.

F11= Add Row F12= Delete Row

Add Delete Save Close

List Columns (system)

DIAGNOSISCODES

HOSPITAL

Lastline

PRIMARYPHYSICIAN

PROVIDERS

REFERRALPROCEDUF

STRESSTSTREASONS

The column will appear in the List Column list.

Double click on the column to insert it into the letter.

NOTES:



Forms to be Signed

These are electronics forms used in the IMS to take signature for Patient, Guardian, Staff, and Doctor.

Signatures are taken when the patient checks in or checks out.

Screen below shows a list of “Forms to be filled” and “Forms to be signed”:

Check In - Test, Bhavu (PT00000031)

DOB: 07/02/1985 22 Yr(s) 8 Mont
Address: test 5
Holtsville NY 00501
Verify: system
Primary Doctor: Primary, Bhavu
Referral Doctor: Primary, Bhavu
Case: General

Phone(s):
SSN: - - -
[Click here to VERIFY patient detail](#)
[Click here to EDIT patient detail](#)
[Click here to EDIT case detail](#)

Insurance	ID	Priority	Start Date	End Date	Group No	Copay	S	I
P America Life insuranced (11	121212	Primary						M
P Medicare (999)	C002 974964794	Secondary				10/10		M
P		Tertiary						M

Forms to be signed:

Form	Frequency
INFORMED CONSENT FOR CON	Every Visit
INFORMED CONSENT FOR CONT	Every Visit
PATIENT BILL OF RIGHTS	Every Visit

* Signature Taken R= Required

Forms to be filled:

P	Form
<input type="checkbox"/>	DMV APP. PLATES/ PALCARD
<input type="checkbox"/>	AUTHORIZATION REQUEST
<input type="checkbox"/>	CLAIM FOR DISABILITY INSURANCE BE

* = Filled R= Required [Click here to print Form](#)

Patient Note:

Alert	Active	B	D	Date	Type
-------	--------	---	---	------	------

Select checkbox to mark/unmark alert B- Billable D- Billed

[Click here to print label](#)
[Click here to take photo](#)
[Click here to collect Copay](#)
Patient Balance = 106.10
Payment Plan: N

[Get/View Sign/Fill Form](#) [Print Signed Form](#) [Close](#)

NOTES:

Forms to be filled:

Forms to be filled are used during scheduling appointments or checking patients in or out. These are forms which will fill with details required on the forms. Details, which are not set on the forms, can be typed or edited during the form filling process.

For example, Forms that are set as “Forms to be filled” for scheduling appear at the time of creating an appointment:

The screenshot shows the 'Schedule Entry' window for 03/22/2008 Saturday. The window contains fields for Patient, Time, Duration, Procedure, Room, Case, Autho. No., Office, and Note. A 'Forms (To Be Filled)' dialog box is open, displaying a list of forms: 'P Form', 'AUTHORIZATION TX REQUEST', and 'REFERRAL FORM'. The 'Fill Form' button is highlighted. A callout points to the list of forms with the text: '2 Forms to be filled appeared at the time of booking appointment.' Another callout points to the 'Fill Form' button with the text: 'Select the form and click on "Fill Form" to fill it.'

Pt.	Insurance(s)	ID	Priority	Start Date
P	<input type="checkbox"/> America Life insurance	121212	Primary	
P	<input type="checkbox"/> Medicare	974964794	Secondary	
P	<input type="checkbox"/> CIGNA	125632	Tertiary	

NOTES:

Setting Letter Templates as “Forms to be Signed”

Setup>> Other>> Form To Be Signed

Form to be signed

Forms to be Signed

- List of **selected forms**
- Select **Procedure** for which this form needs to be signed.
- Select time to get sign, either **check in** or **check out**.
- Check boxes whose **signature required**.
- Select the **letter template** from the list to be used as a form to be signed.

Office: 876 - LC Procedure: All

From Age: To Age: Day(s)

Get Sign: When Check In Required: Every Visit

Start: 11/16/2007 End: 11/14/2008

Signature Required For*

Patient: ☒ Guardian: ☐ Staff: ☐ Doctor: ☒

Sign Forms:

Language*	Letter Template*
1. English	Hippa

Click here to setup Letter Template F11= Add Row F12 = Delete Row

Buttons: Add, Delete, Cancel, Save, Close

Create “Forms to Be Filled” - Add Database Fields to the Form

Setup>>Other>>Form To Be Filled

Form to Be Filled

Office: 00001 - Mary

List of already set forms

- Click on the icon to select image file for the form.
- Click on the icon to edit or view the existing form.
- Click on the icon to scan the image.

Description: PHYSICAL THERAPY FORM

For: Check In Seq.: Active: ☒

Required: ☐ Print Background: ☒

Auto-Check In: ☒ Open when needed: ☐

Doctor: All Procedure: All Room: All Insurance: All


From Age: To Age: Day(s)

Category: PATIENT LETTER (GENERAL)

Forward To: Send To: (?) No

Buttons: Set Columns, Add, Delete, Cancel, Save, Close

NOTES:

To add new form from the image file stored in the computer click on  icon from the form to be filled screen.

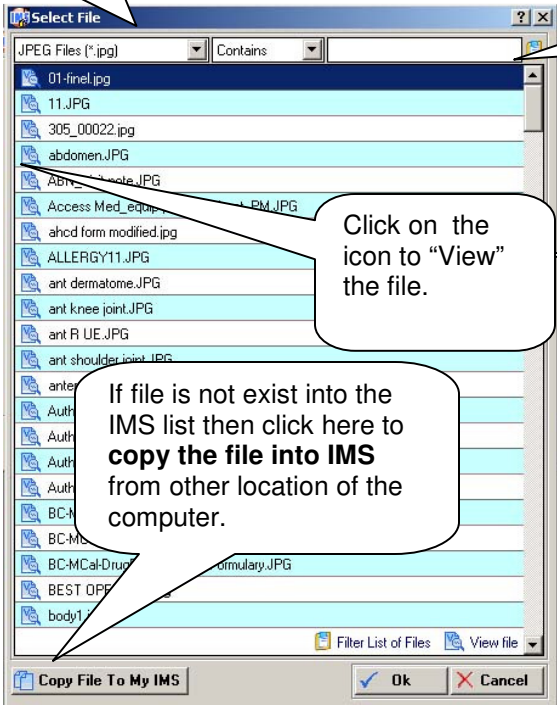
Select specific **file extension** for the letterhead image file to retrieve. Available extensions are JPG, GIF, and BMP, TIFF.

Click here to get **list** of all available images in the IMS.

Click on the icon to "View" the file.


List of all available **images in the IMS**.

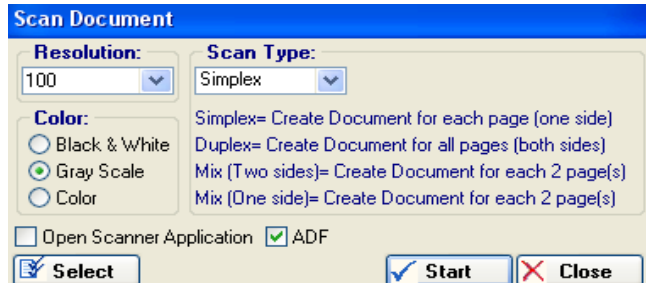
If file is not exist into the IMS list then click here to **copy the file into IMS** from other location of the computer.



Once the image is copied into IMS, select it and click on "OK".

NOTES:

Another way to integrate the form in the system is to scan it. Just click on this icon .



Scan Document

Resolution: 100

Scan Type: Simplex

Color:
☐ Black & White
☒ Gray Scale
☐ Color


Simplex= Create Document for each page (one side)
 Duplex= Create Document for all pages (both sides)
 Mix (Two sides)= Create Document for each 2 page(s)
 Mix (One side)= Create Document for each 2 page(s)

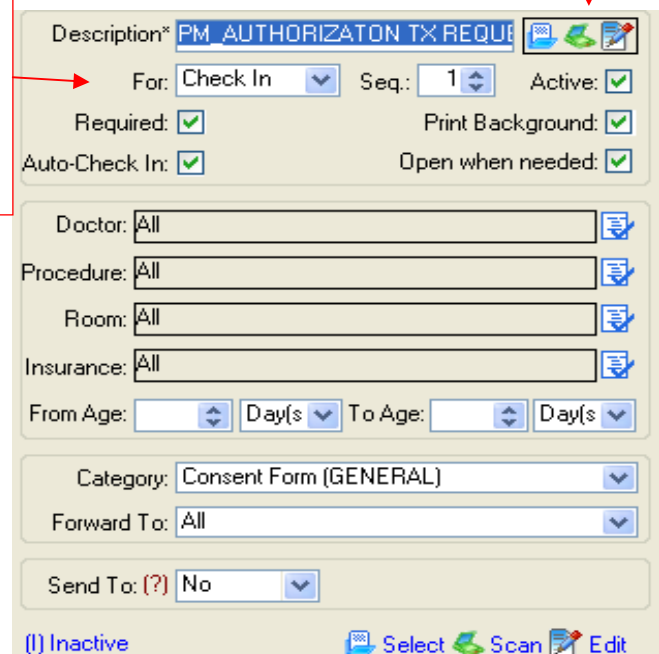
☐ Open Scanner Application ☒ ADF




In Scan Document window you can change the resolution, scan type, etc. and click on Start.

There are 3 options where the Form would appear. It could be during scheduling a patient or when you check in or check out a patient.

- Schedule
- Check In
- Check Out

Any changes in the Form, can be edited through this icon .



Description*: PM_AUTHORIZATION TX REQUEST   

For: Check In Seq.: 1 Active: ☒

Required: ☒ Print Background: ☒

Auto-Check In: ☒ Open when needed: ☒

Doctor: All

Procedure: All

Room: All




Insurance: All

From Age: Day(s) To Age: Day(s)

Category: Consent Form (GENERAL)

Forward To: All

Send To: (?) No

(I) Inactive   

NOTES:




Required – when this is checked, you can't schedule a patient or check in/out a patient if the form is not filled up.

Sequence – you can sequence the forms if there are more Forms under Schedule or Check In/Out (form to be filled).

Print background – to print the background of the form during printing.

Auto-Check In – form is available for KIOSK check in.

Open when needed – this is related to auto-check in, the form can be open when needed.

Doctor – the form can be assigned to a specific doctor. Click on this icon  to select a doctor. By default it is set to "ALL". The form will show up only to the certain doctor selected.

Procedure, Room and Insurance – you can as well as select a specific procedure, room and insurance.

From Age and To Age – if the form is intended only for a certain age level then you can provide the age (days or years) from these fields. Basically, the form will only appear in the Form to be filled box if the patient age match based on what is specified.

Category – where you can select what document category this form belongs.

Forward To – click on the dropdown arrow to select a certain person (office employees/doctors) where you want this form to be forwarded.

Sent To - you can send the form to any of the following:

- Lab
- Hospital
- Facility
- Pharmacy
- Insurance
- Others

Example:

A screenshot of a software interface showing a "Send To:" label followed by a dropdown menu with a red question mark icon, currently displaying "Hospital". To the right of the dropdown is a text field containing "Mount Sinai Hospital" with a small dropdown arrow on its right side.

From "Forms to be Filled" setup screen, click on  **Set Columns** icon to set columns on the form.

NOTES:

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www.meditab.com

(PUT OFFICE NAME OVER HERE)

Referral Form **DATE:** _____

PATIENT NAME: _____

ADDRESS: _____

HEALTH PLAN: _____

PRIMARY CARE PHYSICIAN: _____

REQUESTING PROVIDER (if different from PCP): _____

ICD9: _____

ICD9: _____

DIAGNOSIS: _____

DIAGNOSIS: _____

Select Column

Column	Font	Size	B	I	U
Office					
Office Group					
Doctor					
Patient					
<input type="checkbox"/> Patient Gender					
<input type="checkbox"/> Patient Name					
<input checked="" type="checkbox"/> Patient First Name	Arial	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Patient Last Name					

Change the **font** and **size** if required.

Once form opens, click anywhere in the form to open **"Select Column"** screen.

Select the desired **category** and then the **column** to put on the form.


For e.g. here Category is **"Patient"** and selected column is **"Patient First name"**.

Once column(s) selected, move it to appropriate location.

PATIENT NAME: (0) Patient First Name

ADDRESS: _____

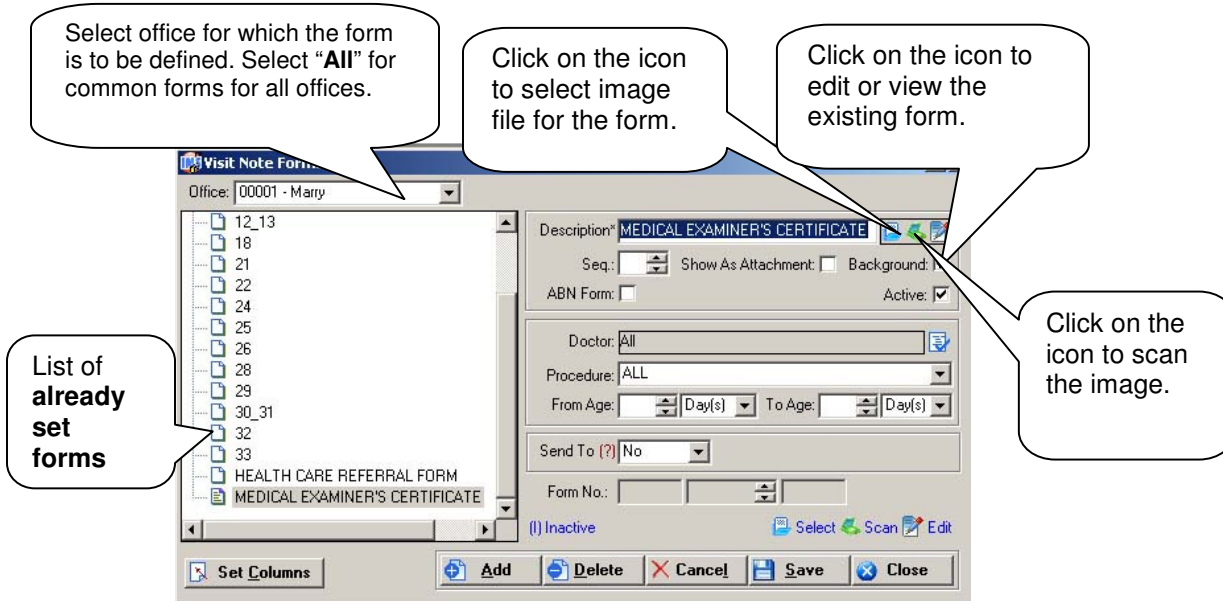
As shown here, keep the column slightly below to the line to align with the title text.

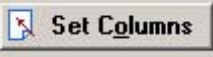
Click on **"Clear Column"** button  on the bottom side of the form to remove the column. It will show the list of the columns, then select the desired column(s) and delete it.

NOTES:

Create “Visit Note Forms” & Add Database Fields to the Form

Setup>>Visit Note>>More>>Forms



From “Visit Note Forms” setup screen, click  icon to set the columns on the form.

Like “Forms to be filled” click on form and “Select Column” window will open. Choose the columns and align it to the title text.

The screenshot shows the 'MEDICAL EXAMINER'S CERTIFICATE' form. The form has fields for 'NAME OF CANDIDATE', 'DOB', 'CURRENT ADDRESS', 'WEIGHT', 'AGE', 'HEIGHT', 'PULSE AFTER ONE MINUTE', 'IS HEART ACTION UNIFORM', and 'IS THERE EVIDENCE OF DIS'. The 'Select Column' window is open, showing a list of columns to be added to the form. The columns are: 'Pulse Position', 'Pulse Regular', 'Oxygen', 'Weight (lbs)', and 'Vital Signs'. The 'Weight (lbs)' column is selected, and the font is set to 'Arial' and the size to '10'.

NOTES:
