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Companies, names and/or data used in screens and sample output are fictitious unless otherwise noted.
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SECTION 1

Getting Started

1.1 About Crystal Practice Management

Welcome to Crystal Practice Management. The Crystal PM system is comprised of eight modules that support all aspects of patient management. These modules are covered in Sections 2 through 9, as follows:

- **SECTION 2. Patients** - create, view and maintain general information, insurance information and prescription information for all patients for your practice.

- **SECTION 3. Billing** - create invoices and process payments made on a patient’s account by either the patient or the insurance provider.

- **SECTION 4. Tasks** - notify office staff of daily tasks, announcements, appointments or other important information.

- **SECTION 5. Schedule** - schedule patient appointments and view staff schedules on a Daily, Weekly or Monthly basis. It includes a Search function to locate available times for scheduling patient appointments.

- **SECTION 6. Inventory** - manage your inventory of frames, contact lenses and other products. If the system has been preloaded with the Frame UPC CD, managing frames inventory is streamlined by “auto-filling” when a registered barcode is entered.

- **SECTION 7. Reports** - quickly and efficiently monitor the current state of your practice with one of 14 pre-defined reports any needed date range. Reports can be divided into two primary categories: Financial and Non-Financial.

- **SECTION 8. Records** - create and maintain Medical Records for a patient in your practice. Medical Records in Crystal PM are completely customizable, allowing them to be tailored to fit your specific needs. The examples shown in this section are of “typical” Medical Records pages, and may differ from your customized system.

- **SECTION 9. Administration** - configure the Crystal PM system to suit the needs of your office. You can set “default” values for other system modules, configure the system to work with other third-party applications (email, DVI Remo, etc.), maintain the employee roster and schedule, and other “housekeeping” tasks.
1.2 The Crystal PM Main Window

The Crystal PM Main Window has four functional areas:

- **Menu Bar** - Provides access to the system menus that contain general functions for use with all system modules (see System Menus below).
- **Toolbar** - Contains the buttons to launch each Crystal PM module.
- **Display Area** - Displays informational windows, dialogs and other system displays.
- **Status Bar** - Displays the name of the currently active patient (see Section 2.2, Adding & Searching for Patients on page 2-1 for more information).

### System Menus

**File**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Save</td>
<td>When active, information is saved when exiting a main window (it is not necessary to manually save when closing a main window). This option is selected (active) by default.</td>
</tr>
<tr>
<td>Save (F2)</td>
<td>Saves changes to the current page. This function is necessary only when Auto Save is not selected.</td>
</tr>
<tr>
<td>Print Page (F4)</td>
<td>Prints the current main window.</td>
</tr>
<tr>
<td>Print Options</td>
<td>Default Printer allows you to change the default print settings; Print Preview, when selected, displays a print preview of the current page instead of sending the information directly to the printer; Select Printer Everytime, when selected gives you the option to change the print settings each time (when deselected, will always use default print settings); Label Printer does xxx</td>
</tr>
<tr>
<td>Close Sub Window</td>
<td>Returns to the blank Crystal PM Main Window (pictured above)</td>
</tr>
<tr>
<td>Change User Info</td>
<td>When in Require User/Password Login mode (see 9.2, Security Levels on page 9-1), allows the logged-in user to change their password and contact information.</td>
</tr>
<tr>
<td>Exit</td>
<td>Closes the Crystal PM application.</td>
</tr>
</tbody>
</table>

**Configuration**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server</td>
<td>Changes the server where the database resides. Server can be specified by either IP address or computer name.</td>
</tr>
<tr>
<td>Tablet Version</td>
<td>When selected, enables certain features to make the system easier to use on Tablet PCs (see Section 1.3, Tablet Version on page 1-5 for more information).</td>
</tr>
<tr>
<td>Scanner Options</td>
<td>Selects the type of scanner being used. External App is used for Fujitsu scanners that integrate directly with Crystal PM and expedite the scanning process. Twain is for a traditional scanning process that requires you to open a scanning window, select the settings, etc.</td>
</tr>
<tr>
<td>Web Cam</td>
<td>When active, shows the WebCam button on the Patient Info page (see Section 2.4.2, Adding a Patient Photograph on page 2-4 for more information).</td>
</tr>
</tbody>
</table>
## Synchronize Client
Used to synchronize your client computer with the server version. Note that your computer will need to restart to complete the synchronization.

## Import Spex UPC CD
Imports the UPC codes from the most recent Spex CD (released on a monthly basis). Note that it is best to perform this action overnight, since it can take a long time.

## Hide Sign-In List
When selected, hides the patient sign-in list which appears to the right of the toolbar.

## Disable ScrollBars
Should be selected if your screen resolution (and the default size of Crystal PM in your computer) is 1024 x 768 or larger; should be deselected if smaller, to enable scrolling through windows.

## Set Current Screen Size as Default
Sets the current screen size as the default, so the Crystal PM window will always be that size when you open the program.

## Set Current Screen Location as Default
Sets the current tool/location (e.g., tasks, schedule, etc.) as the default, so the Crystal PM window will always open to that window when you open the program.

In addition to the above, the following functions are available in the Configuration menu **only when accessed from certain modules.**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Without Saving</td>
<td><strong>Records Module Only:</strong> Closes the Record without saving the changes.</td>
</tr>
<tr>
<td>Export New Patient WebPage</td>
<td><strong>Patient Module Only:</strong> Exports a new html file for use on the Patient Website. See Section 9.3.24, Website on page 9-25 for more information.</td>
</tr>
</tbody>
</table>

### Station

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toolbar Background Color</td>
<td>Changes the color behind the toolbar.</td>
</tr>
<tr>
<td>Toolbar Font Color</td>
<td>Changes the color of the text in the toolbar items.</td>
</tr>
<tr>
<td>Background</td>
<td>Change the image in the background of the Crystal PM Main Window.</td>
</tr>
<tr>
<td>Restore Crystal PM Defaults</td>
<td>Restores all Station settings to factory defaults.</td>
</tr>
</tbody>
</table>

### EHR

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display F9 Button</td>
<td>When selected, the F9 button will appear next to any field with F9 defaults available.</td>
</tr>
<tr>
<td>Display F9 on Focus</td>
<td>When selected, will automatically open the F9 defaults whenever available.</td>
</tr>
<tr>
<td>Display Hidden Boxes</td>
<td>When selected, will make the boxes for each entry field invisible.</td>
</tr>
<tr>
<td>Auto-Center Field on Page</td>
<td>When selected, automatically scrolls to centers each filed in the viewing window. Usually preferred for tablets or smaller monitors.</td>
</tr>
<tr>
<td>Import Templates</td>
<td>Used to import templates shared by other practices (see Section 9.3.21, Updates on page 9-23 for details), as well as backing up and restoring templates. Selecting this option will open the Medical Record Configuration Utility, which provides further instructions.</td>
</tr>
</tbody>
</table>

In addition to the above, the following functions are available in the EHR menu **only when accessed from the Records module.** See Section 8 for more information on the items below.

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<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AutoSave Every Min</td>
<td>When selected, will automatically save any page every minute.</td>
</tr>
<tr>
<td>All F8 Keys (SHIFT+F8)</td>
<td>Automatically fills all fields with the Default Exam Values.</td>
</tr>
<tr>
<td>Show Fields for Procedure (F7)</td>
<td>Opens the Fields for Procedure window.</td>
</tr>
<tr>
<td>Switch Med View (F5)</td>
<td>If an old record is open, switches between the old record and the current one.</td>
</tr>
<tr>
<td>Auto-History (F12)</td>
<td>When selected, clicking on a field that was filled in on a previous record will automatically show the historical data in a dropdown menu.</td>
</tr>
<tr>
<td>Import from Last Exam (ALT+F8)</td>
<td>When selected, the user can press &lt;Alt&gt; + &lt;F8&gt; to automatically fill the selected field with information from the most recent exam.</td>
</tr>
</tbody>
</table>
### Edit Medical Records
Enables Edit Records Mode, allowing the user to edit the Medical Records templates.

### Delete Medical Record
Deletes the current Record. **Note: Deleted medical records cannot be restored.**

### Change Medical Record Date
Changes the date of the current Record.

### Change Medical Record Patient
Changes the patient associated with the current Record.

### Edit Records for Procedure
Opens the Records for Procedure dialog.

### Place Time In Current Field (CTRL+T)
Places the time in the current field.

### Display Change Log
Opens the change log for the current medical record (see Section 7.2.13, *Medical Records Change Log on page 7-13* for more information).

### External Data
Opens the Summary Form that contains the Continuity of Care Record and additional certification requirements not commonly used by most optometry practices.

### Print to PDF
Saves the current page as a PDF file.

### Import/Export

<table>
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<tr>
<th>Function</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Import a Patient</td>
<td>Imports patient information from a data file.</td>
</tr>
<tr>
<td>Export a Patient</td>
<td>Exports patient demographics and other selected information to a data file.</td>
</tr>
<tr>
<td>Encrypt a File</td>
<td>Encrypts a file for secure transfer of information.</td>
</tr>
<tr>
<td>Decrypt a File</td>
<td>Decrypts a file that was encrypted using Crystal PM.</td>
</tr>
</tbody>
</table>

In addition to the above, the following functions are available in the Import/Export menu **only when accessed from the Records module.**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Import Machine</td>
<td>For configured external devices, imports data from the selected machine into the associated medical records fields (See Section 8.2.3, <em>Importing Data from Other Devices on page 8-3</em> for details).</td>
</tr>
<tr>
<td>Export Medical History Webpage</td>
<td>Exports the open tab as a new html file for use on the Patient Website. See Section 9.3.24, <em>Website on page 9-25</em> for more information.</td>
</tr>
<tr>
<td>Export Medical History Webpage (method 2)</td>
<td>Same as above, but using a slightly different export method. This method is usually preferred for pages with a lot of text boxes. See Section 9.3.24, <em>Website on page 9-25</em> for more information.</td>
</tr>
</tbody>
</table>

### Support

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Tech Support</td>
<td>Creates an email to Crystal PM technical support.</td>
</tr>
<tr>
<td>Visit Web Support</td>
<td>Opens a browser to the Crystal PM website.</td>
</tr>
<tr>
<td>Call Tech Support</td>
<td>Displays the Abeo Solutions telephone numbers.</td>
</tr>
<tr>
<td>Goto Meeting</td>
<td>Opens a browser to GoToMeeting screensharing program. (Use only when prompted by customer support.)</td>
</tr>
<tr>
<td>Join Me</td>
<td>Opens a browser to Join.Me screensharing program. (Use only when prompted by customer support.)</td>
</tr>
</tbody>
</table>

### Help

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Documentation</td>
<td>Opens the electronic documentation manual.</td>
</tr>
<tr>
<td>About</td>
<td>Shows the current software version of the Crystal PM client.</td>
</tr>
</tbody>
</table>
Schedule

This menu is available only in the Schedule module.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toggle Hide Missed / Cancelled Appointments</td>
<td>When selected, appointments that were missed or cancelled will be hidden from the display view.</td>
</tr>
<tr>
<td>Print Schedule Display View</td>
<td>Prints the schedule, using the current display view.</td>
</tr>
</tbody>
</table>

1.3 Tablet Version

Tablet version is designed to take advantage of the point and click capabilities using a stylus and Tablet PC computer. Turn tablet version on by selecting Tablet Version from the Configuration menu.

Tablet version contains the following differences:

- **Search for Patient**: The Search for Patient window facilitates searching for patients without a keyboard.
- **Health Records**: Tablet version allows for easy clicking and navigating through the exam forms. When an exam field is selected two buttons will appear.
  - Opens the handwriting entry box, allowing you to handwrite using a stylus. Crystal PM will decipher your handwriting and list all possible text in the lower box. Select your desired text or use the buttons beneath to modify.
  - is the frequent responses shortcut, allowing you to insert pre-populated frequently used text.
- **Exam**: For an exam page with Shortcut Buttons enabled there will be a button next to the Assigned Doctor dropdown menu. Click the Shift F8 button to auto fill the exam form with the standard defaults.

1.4 Administrative Login

Certain modules, features and function within the Crystal PM system are password protected to be accessible to Administrative staff only. When a password protected feature or function is selected, a login dialog displays. You must enter a valid password in order to access the selected feature or function. For more on administrative logins and passwords, see Error! Reference source not found., System Administration.Error! Reference source not found.
SECTION 2
Managing Patients

2.1 Overview

The Patient module lets you create, view and maintain general information, insurance information and prescription information for all patients for your practice.

To display the Patient window:

Click the Patient button in the Main Toolbar.

- If a patient is currently selected, the Quick View page for the current patient displays (see Section 2.4, Quick View on page 2-3 for details).

- If a patient is not currently selected, the Search for Patient dialog displays (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).

To select a new patient while in the Quick View, click the button in the Main Toolbar to display the Search for Patient dialog.

Default values and menu selections in the Patients module are maintained in the Administration Module (see Section 9, System Administration for details).

2.2 Adding & Searching for Patients

Use the Search for Patient dialog to search the patient database for an existing patient, or to add a brief record to the database for a new patient.

To select an existing patient:

1. Search for a patient by entering the first few characters of the patient’s last name in the Search Text box.

   - The Select Patient list shows all patient names that match your search criteria.

   - You can also search by first name, account ID, address, birthday, nickname, phone number, social security number, email or insurance ID, by selecting the relevant entry in the Search By Criteria dropdown menu.

2. Double-click the name of the desired patient in the Select Patient, Patient Signed In or Most Recent Patients lists.
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- The Search for Patient dialog closes, and the screen refreshes to display the Quick View page for the selected patient.
- Once a patient has been selected, the patient’s name, age and date of birth display in the lower left-hand corner of every Crystal PM screen.

To add a new patient:

1. Click the Add New Patient button.
   - The Add Patient dialog displays.

2. Select a title (Mr., Mrs., etc.) for the new patient from the drop-down menu, then enter the patient’s name in the Last and First text boxes. This information is mandatory.

3. Enter the patient’s personal and contact information and preferred contact method. Either the Cell Phone or Home Phone number is mandatory.

![Add Patient Dialog]

Enter the phone numbers as a string of digits; the software will fill the parentheses and hyphens automatically. For example, to enter the phone number “(800) 555-1212”, type “8005551212”.

4. Select the patient’s Insurance provider(s) from the Primary insurance, Secondary Insurance and Tertiary Insurance menus.

5. Click the OK button to add the new patient to the patient’s database.
   - The system will automatically generate an Account # for the patient and will take you to the Quick View page for that patient.

2.3 Viewing Patient Information

The Patient window provides access to eight “pages” of patient information:

- The Quick View (Section 2.4, page 2-3) provides a general overview, taken from the other pages within this window.
- Patient Information (Section 2.5, page 2-5) contains basic contact and demographic information.
- Additional Information (Section 2.6, page 2-6) contains referrals, letters, alerts, and other optional data.
- The Insurance page (Section 2.6.7, page 2-9) contains all relevant insurance information. Up to three providers may be associated with a single patient.
- The Prescription page (Section 2.8, page 2-12) maintains prescription information.
- Notes (Section 2.9, page 2-19) allows you to enter free-form medical, personal, or correspondence notes.
- The Files page (Section 2.10, page 2-20) lets you attach data files created outside the Crystal PM system to the patient’s file.
- The Status page (Section 2.11, page 2-23) provides an overview of prescriptions, orders, billing, and notes.
2.4 Quick View

The Quick View page provides an overview of the patient’s most pertinent information.

To view the Quick View page:

Click the Quick View tab in the Patient window. Note that this page opens by default whenever you access the Patient module.

This page is primarily read-only, with the content culled from other pages within the Patient module. With the exception of the photograph in the upper right corner (see Section 2.4.2, Adding a Patient Photograph on page 2-4), none of the data can be changed from this page.

2.4.1 Viewing Quick View Information

The Quick View page provides the following information:

- **Contact Information** - including address, e-mail, phone #s and preferred contact method.
- **Alert Comment** - the text of any alert comment entered on the Patient Information page. The Alert Comment is displayed in red type.
- **Account #** - the patient’s Account number, automatically generated by the Crystal PM system.
- **Personal Information** - including Social Security Number, birthdate, and age.
- **Doctor** - the Doctor to whom the patient is currently assigned. If the patient is not currently assigned to a Doctor, this field shows the message “No Doctor Assigned.”
- **Next Appointments** - shows a listing of all currently scheduled future appointments for the patient (see Section 2.4.3, Viewing Appointments and Appointment History on page 2-4 for details).
- **Last 5 Appointments** - shows a listing of the previous five appointments for the patient (see Section 2.4.3, Viewing Appointments and Appointment History on page 2-4 for details).
- **Billing Info** - including insurance balance, patient balance, amounts owed/paid, and courtesy discounts.
- **Last Paid** - the date on which the most recent payment on the account was made, in MM/DD/YYYY format.
- **Courtesy Discount** - shows the discount (as a percentage) to be applied to charges against the patient’s account.
- **Insurance** - shows the names of the patient’s Primary, Secondary and Tertiary Insurance providers. The word “None” is displayed if the patient does not have Insurance.
- **Linked Accounts** - shows a listing of other patients (e.g., dependents or guarantors) that are linked to the current patient’s account (see Section 2.4.4, Viewing a Linked Account on page 2-4 for details).
2.4.2 Adding a Patient Photograph

If desired, you can include a photograph of the patient on the Quick View page. You can either import an existing photograph of the patient, or use your WebCam to take a new photograph of the patient.

**To import an existing photograph:**

1. On the Quick View page, click the Find Image button below the photograph field.
   - A standard Windows Find File dialog displays.
2. Locate and select the desired image file (.JPG, .BMP, .TIF, etc.), then click the Open button.
   - The Find File dialog closes, and the screen refreshes to display the selected image in the photograph field.

**To scan an existing photograph:**

Twain Scanner: On the Quick View page, click the Scan Image button below the photograph field and follow the onscreen instructions.

External App Scanner: Ensure the scanner in the system tray is set to scan a patient photograph. Press the scan button on your scanner, and then click Find Image.

**To capture an image using your WebCam:**

1. If unselected, select WebCam from the Configuration menu.
   - The Start WebCam button displays beneath the photograph field.
2. Click the Start WebCam button.
   - The Video Capture dialog displays, showing a listing of all available devices (WebCams).
3. Select the desired device from the list (the selected device will be highlighted), then click the Start Preview button.
   - The image seen by the WebCam will display in the photograph field on the Quick View page.
4. Click the Save Image button on the Video Capture dialog to save the image on the Quick View page.

2.4.3 Viewing Appointments and Appointment History

The Next Appointments and Last 5 Appointments fields on the Quick View page show a listing of all currently scheduled future appointments and the previous five appointments, respectively, for the patient. Each line in the listing displays the date and time, the doctor (Emp) seeing the patient, billing codes, visit type, and status.

**To view the Schedule page for an appointment**, double-click the appointment. See Section 5, Managing Schedules for more information on appointments and appointment statuses.

2.4.4 Viewing a Linked Account

The Linked Accounts field on the Quick View page shows a listing of all patient accounts that are linked (usually family members) to the current patient's account. The current patient's account is also included in the list. In addition to the name, age, and next exam date, the listing displays the balance (total amount due on the associated patient's account for which the patient is responsible) and insurance balance (the total amount due on the associated patient's account for which the patient's Insurance provider is responsible) for each linked account.
To view a linked account, double-click the account you wish to view in the Linked Accounts field. The screen refreshes to display the Quick View page for the selected linked account, and the patient associated with the account becomes the “active” patient for the system.

2.5 Patient Information

The Patient Information page lets you maintain essential information for each patient.

To view the Patient Information page:

Click the Patient Info tab in the Patient window.

- For new patients, the Patient name and Home Phone fields are prefilled. All other fields are blank, or contain the system “default” values.
- For existing patients, all previously entered patient information is displayed. You may enter or edit any information shown on the Patient Information page as desired.

2.5.1 Entering and Editing Patient Information

Information on this page should be filled out as completely as possible. Other modules in the system will use the information provided on this page.

- Enter all relevant information in the appropriate field.
- If a nickname is entered in the Nickname box, this name will appear in parentheses following the patient’s name in most places the name appears.
- If desired, you may link the current patient’s account to another account in the system (see Section 2.5.2, Linking Accounts on page 2-5 for details).
- Enter phone numbers as a string of digits; the software will fill the parentheses and hyphens automatically. For example, to enter the phone number “(800) 555-1212”, type “8005551212”.
- Enter any “alert” information in the Alert Comments text box. The “alert” comment will be displayed in the Alert Comment field of the Quick View page, in red type.
- The Occupation field may include a default listing of occupations appropriate to your geographic area. You may select the desired Occupation from the values available.
- The Primary Doctor menu contains a listing of all Doctors defined for your practice. Use this menu to select the Doctor to whom the patient will be assigned.

2.5.2 Linking Accounts

If desired, you can link the current patient’s account to another existing account in the system, such as a sibling or parent.
To link the account:

1. Select the desired option from the Linked Account? dropdown menu:
   - **Link to Guarantor** sets the person you are linking to as the primary insurance holder and will transfer the address, phone number and Insurance information of the account you are linking to into the current patient's account. **Note:** Selecting this option will change the address, phone number and insurance information associated with your current open account.
   - **Link to Sibling** - this option will transfer the information of the account you are linking to into the current patient's account, but does not set that person as the primary insurance holder. **Note:** There are two sibling links available: one will transfer insurance information, the other will not. Both options will change the address and phone number associated with your current account.
   - **Link without information** - this option will link accounts together, but will not transfer any information.

To unlink accounts, select None from the Linked Account? menu.

2. When you have selected a linking option, the Search for Patient dialog displays (see Section 2.2, Adding & Searching for Patients on page 2-1). Locate and select the patient to whom you wish to link the current patient's account.

### 2.6 Additional Information

The Additional Information page lets you maintain "optional" information such as referrals, recalls, alerts, etc. for the patient.

**To view the Additional Information page:**

Click the Additional Info tab in the Patient window.

#### 2.6.1 Referrals

You can use the Referrals field to indicate how the patient was referred to your practice.

**To set Referrals information:**

- If the current patient was referred to your practice by another patient, select the Patient Referral radio button, then choose Find Patient from the associated drop-down menu.
  
  The Search for Patient dialog displays (see Section 2.2, Adding & Searching for Patients on page 2-1 for details). Locate and select the patient that referred the current patient to your practice.

- If the current patient was referred to your practice by another professional, select the Professional Referral radio button, and enter the name of the referring Doctor in the associated text box.

  The Professional Referral field may include a default listing of referring professionals outside your practice. You may select the desired referrer from the values available.
If the current patient was referred to your practice by other means (phone book, newspaper, etc.), select the Other radio button, and enter the method of referral in the associated text box.

The Other field may include a default listing of other referral means. You may select the desired method of referral from the values available.

2.6.2 Mailings

Use the Mailings options to indicate the patient’s preference for receiving mailings from your practice. These selections are used by the Reports module to locate patients that allow statements to be sent by mail, or who wish to receive a newsletter (see Section 7.2.5, Correspondence Report on page 7-5 for more information). Select the desired options from the Send Statements and Newsletter menus.

2.6.3 Billing Information

Use the Billing Info field to record the date that a patient submitted their signature to you, the date that the patient signed the HIPAA form, and to assign a courtesy discount or finance charges to a patient.

To record signature information:
Enter the date on which the patient provided the appropriate signature in the Signature on File and/or HIPAA Sig on File text boxes.

To assign a courtesy discount:
Enter the appropriate courtesy discount (as a percentage) in the Courtesy Discount field, or use the and buttons to scroll to the desired discount percentage.

Apply Finance Charges:
A Yes value indicates that this patient will be subject to finance charges when they are applied globally to patients who are overdue on their invoices. For more on applying finance charges, see Section 7.2.18, Patients Receivable Report on page 7-14.

2.6.4 Recalls

The Recalls field lets you create, edit or delete recalls (request for follow-ups).

To add a recall for a patient:
1. Click the Add Recall button.
   - The Add Recall to Patient’s File dialog displays.
2. Select the type of recall you wish to add from the Type of Recall menu.
3. Enter the date on which you wish to schedule the recall in the Date for Next Recall field.
4. Click the Save button to add the recall to the patient’s file.

To edit a recall for a patient:
In the Recalls list, double-click the recall you wish to edit and change the values in the Add Recall to Patient’s File dialog as desired.
To delete a recall for a patient:

In the **Recalls** list, select the recall you wish to edit and click the **Delete Recall** button.

### 2.6.5 Alerts

Use the **Alerts** field to enter important information that applies to the patient in relation to a specific procedure or function within your practice. Alerts can be created for the Patients, Billing, Schedule or Records modules. When an alert is created for a patient, and the module to which the alert is associated is accessed while the patient is active, a message dialog displays the alert text.

For example, if a patient does not wish to schedule appointments on a Wednesday, you might create an alert message for the Schedule module stating "NO WEDNESDAY APPOINTMENTS."

To add an alert:

1. Click the **Add Alert** button.  
   + The Edit Alert dialog displays.
2. Enter the alert message in the text field.
3. Use the **Patient Page**, **Billing Page**, **Schedule Page** and/or **Records Page** checkboxes to select the module(s) in which the alert will display.  
   + A checkmark indicates the alert will be displayed in the associated module.
   + An empty checkbox indicates the alert will not be displayed in the associated module.
4. Click the **Update Alert** button to add the alert to the **Alerts** list.

To edit an alert:

In the **Alerts** list, double-click the alert you wish to edit and change the values in the Edit Alert dialog as desired.

To delete an alert:

In the **Alerts** list, click the alert you wish to delete (the selected recall will be highlighted), then click the **Delete Alert** button.

### 2.6.6 Patient Status

If a patient is no longer active with your practice, you can set the patient’s status to “inactive.” This will prevent the patient’s name from appearing on reports and searches.

To set a patient’s status to “inactive”:

1. Click the **Set Patient Inactive** button.  
   + A confirmation dialog displays the message “Are you sure you want to inactivate this patient?”
2. Click the **Yes** button on the confirmation dialog to complete the status change.

A patient’s status can be returned to “active” only in the Administration module (see Section 9, **System Administration**, for details).
2.6.7 Merge Patient

Use this feature to merge multiple records belonging to a single patient.

To merge patient records:

1. Open the older or less accurate record (i.e., the one with contact and/or insurance information that is out of date).

2. On the Additional Info page, click Merge Patient.
   - A confirmation window will open with the following message: “This will inactivate this Patient and send all information to another profile. Are you sure?”

3. Click Yes to confirm.
   - The Search for Patient window will open.

4. Find the patient you are merging to and double-click (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).
   - The Crystal PM software will close momentarily while it merges the record. When finished, the system will show you a merge report.

5. Click OK to finish the merge and return to the main Crystal PM window.

2.7 Insurance

The Insurance page maintains information for up to three insurance providers per patient.

To view the Insurance page:

Click the Insurance tab in the Patients window.

To enter or edit insurance information:

1. In the Insurance field, select Primary, Secondary, Tertiary, 4th Ins, Vision Plan, or Medical as appropriate.

   These tab names can be changed in the Defaults section of the Administration module (see Section 9.3.4, Defaults on page 9-5 for details).

2. Select the name of the patient’s Insurance provider from the Name menu.
   - The company name, phone number, and fax number of the insurance company will appear in the upper right corner, underneath Insurance Information. To view additional insurance information, such as address, webpage, email, and contact person, click the + symbol.

   Selections in the Name menu and all content under Insurance Information are maintained in the Administration module (see Section 9.3.10, Insurance on page 9-10 for details). Information on the insurance company cannot be modified from this screen.
3. Enter the patient’s **ID Number**, **Policy Group #**, and **Co Payment** in the appropriate box. To copy the patient’s Social Security Number from the Patient Information page into the **ID Number** text box, click the **ssn** button.

4. If the patient is *not* the primary account holder of the Insurance policy, select the **Not Primary on Account** checkbox and enter the necessary information for the primary account holder in the fields that appear.

   - If the primary account holder is a patient in your practice, click the **Find Patient** button to search for him/her.
   - If the primary account holder’s address is the same as the patient’s, click the **Address Same as Patient** button to import the address.

5. If desired, enter any additional notes related to the Insurance in the **Insurance Notes** field.

   - There is only one **Insurance Notes** section for the entire **Insurance** page. Any change made in the **Primary** subtab will also appear in all other tabs.

When information for all Insurance policies has been entered, the **Insurance Summary** field displays the name of each Insurance provider, and the patient’s co-payment requirements for each policy.

**To add an image of the patient’s insurance card:**

   - If the image is already stored on your computer, click **Find Image** to the right of the window.
   - To capture using a webcam, click **Capture Front / Capture Back**, select the webcam device you are using, hold the insurance card up to the webcam, and then click **Save Pic**.
   - To capture using a Twain scanner, click **Scanner (both)** (for a scanner that will scan both sides at once) / **Scanner (f)** (front) / **Scanner (b)** (back). Then follow the onscreen instructions.
   - To capture using an External App scanner, ensure the scanner in the system tray is set to scan a

   - insurance card. Press the scan button on your scanner, and then click **Scanner (both)** (for a scanner that will scan both sides at once) / **Scanner (f)** (front) / **Scanner (b)** (back).

To view the image in full screen, click the ✡ button next to the image.

To delete an image, click the **Delete Image** button to the right of the button. This button only appears when an image has been added.

2.7.1 **Verifying VSP Eligibility**

If the selected insurance is a VSP plan, the **Get VSP Info** button will appear next to the **Co Payment**. Click the **Get VSP Info** button to launch the VSP Information window, which used to acquire and verify VSP benefits.

**To import the Member ID and Group ID**

   - This action **must** be performed the first time you see any patient using Crystal PM, in order to ensure that Crystal has the information needed in order to contact VSP. You can skip this step once you have the full **Member ID** and **Group ID** entered in. (Note that the **Member ID** will only show the last 4 digits, for security purposes.)

1. Fill in any missing information. VSP needs:

   - **Last Name**
   - **First Name**
Either the full Member ID or both the Last 4 of SSN and Date of Birth.

If the patient is a dependent, you must enter the primary accountholder’s member information. If the primary accountholder’s information was entered in under the Not Primary on Account portion of the main Insurance tab, this information will automatically be populated in these fields. Otherwise, you must enter the information manually at this time.

All information must be entered exactly as it appears in the Eyefinity website. If any information is different (e.g., one includes a middle initial or uses a nickname in place of the first name), an error will occur.

2 Click Show.

- If any information is not filled in, an error message will appear. Verify information and try again.
- If all information is correct the system will return several potential patients.

3 Select the desired patient and click the Select button.

4 If applicable, a pop-up window will ask you to select the Group you wish to use for this patient.

- The VSP Information window will refresh showing details on the member and his/her dependents, and the patient’s full Member ID and Group ID will appear in their respective fields.

If the selected insurance is a VSP plan, the Get VSP Info button will appear next to the Co Payment. Click the Get VSP Info button to launch the VSP Information window, which used to acquire and verify VSP benefits.

To verify & authorize VSP benefits

Use the Eligibility tab to verify benefits. All benefits for this patient are listed under Available Services, organized into categories and color-coded as follows:

- **Green** identifies a benefit currently available to be authorized.
- **Yellow** identifies a current authorization for a benefit.
- **White** identifies an authorization that has expired and will therefore become available if you delete the expired authorization (see below).

While highlighting any of these benefits, click the Authorize link in the Action column to submit an authorization request, or use the Authorization tab as follows:

1 Fill in any additional missing information (Address, City, etc.) as desired.

2 Select the desired Benefit Name from the dropdown menu.

3 Back-Date the authorization, if desired.

4 To authorize for only a specific service or services, select the Split Service checkbox and select the desired services. If unchecked, the system will authorize for all services listed.
Click **Submit**.

**To import or delete an existing authorization**

Importing an existing authorization will primarily be used to import details on an active (yellow) authorization, which may have been performed by another practice or at another time. Deleting an authorization is usually used to clear an expired authorization so that you can re-authorize it. These options are available by selecting the Get Existing Authorization and Delete Authorization radio buttons, respectively, under the Authorization tab.

Select the desired radio button and click **Submit**.

**Additional options**

Use the **Status** tab for additional information about this patient’s VSP eligibility. This tab includes information on:

- Patient eligibility and benefits, including the last date benefits were verified
- Benefit details
- Well Vision Summary.
- Authorizations you are obtaining for this patient.
- The Doctor whose Eyefinity credentials to use, if each doctor is using his/her own credentials and this information is not automatically selected (see the Administration module, Section 9.3.23 on page 9-24 for more information).
- Reports on the patient.

### 2.8 Prescription Information

The Prescription Information page contains prescription information for the patient, allowing you to enter and modify prescription data and create orders for frames or contact lenses.

**To view the Prescription Information page:**

Click the **Prescription** tab in the Patient window.

- Prescription information for the most recent prescription is displayed by default. The date of the prescription is shown in the upper right corner of the screen.

  To view prescription information for other dates, select the desired date from the dropdown date menu, or click the Previous and Next buttons to scroll through prior prescriptions.
Prescription information is “read-only” unless you select to enter a new prescription (see Section 2.8.1, Entering an External Prescription below) or edit an existing prescription (see Section 2.8.2, Editing a Prescription on page 2-14).

2.8.1 Entering an External Prescription

If a patient comes to your practice with a prescription from another Doctor (or that you prescribed but has not been entered into the Crystal PM system), use the External RX function to enter the prescription.

To enter a spectacle and/or contact lens prescriptions:

You may enter up to four spectacle and three contact lens prescriptions for a patient on a given date.

1. Click the External RX button.
   - Current prescription information is cleared from all fields, and the screen is “write-enabled”, allowing you to enter the new prescription.

2. Enter the date of the prescription in the date field.

3. To enter spectacle information, select the Spectacle Rx 1, Spectacle Rx 2, Spectacle Rx 3 or PL Sun/CL (plano sunglasses over contact lenses) button, as desired. To enter contact lens information, select the Contact Lens Rx 1, Contact Lens Rx 2 or Contact Lens Rx 3 button.

When entering multiple prescriptions on the same day, be sure to enter all prescriptions before saving.

- Press the Rename button to rename the spectacle or contact lens prescription (e.g., from Spectacle Rx 1 to Reading Glasses).

4. Enter prescription information in the appropriate fields, and enter notes.
   - The contact lens Manufacturer and Series fields, and both Notes fields, can be field using pre-populated defaults. To use these defaults, press the <F9> key when the field is selected. These defaults are maintained in the Administration module (see Section 9.3.4, Defaults on page 9-5 for details).
   - Press the Import from Last Exam button to copy the data from the most recent prescription.
   - Press the button to copy data from the OD line in the prescription to the OS line.

5. Repeat steps 3 and 4 to add additional prescriptions, as necessary.

6. When all prescription information has been entered, click the Save RX button to save the prescription to the database.
2.8.2 Editing a Prescription

You can use the Edit SP RX and Edit CL RX functions to edit an existing prescription for a patient.

To edit a prescription:
1. Use the date menu in the upper right corner to locate the prescription you wish to edit.
2. Click the Edit SP RX button (to edit the spectacle prescription) or Edit CL RX button (to edit the contact lens prescription).
   - A warning dialog displays the message “Only Doctors are allowed to Update Patient’s Medical Records. Are you sure you want to update the (spectacle/ contact lens) prescription?”
3. Click the Yes button to edit the selected prescription.
   - The message “Updated on (current calendar date)” is added to the prescription notes, and the screen is write-enabled, allowing you to edit the selected prescription.
4. See steps 3 and 4 of Section 2.8.1 above for tips on editing spectacle and contact lens prescriptions.
5. Click the Update SP RX / Update CL RX button to save your changes to the database.

2.8.3 Printing Prescriptions

Only one prescription (either spectacle or contact lens) may be printed at a time.

To print a spectacle or contact lens prescription:
1. Use the date menu to locate the prescription you wish to print.
2. Click the Print Prescription button.
   - The Print Prescription dialog displays.
3. Select the Spectacle or Contacts radio button, then click the Print button.
   - The Print Prescription screen displays in a new window.
4. Select the prescription you wish to print (Spectacle Rx 1 / Spectacle Rx 2 / Spectacle Rx 3 / PL Sun/CL for spectacles, Contact Lens Rx 1 / Contact Lens Rx 2 / Contact Lens Rx 3 for contact lenses).
5. If desired, change the name of the patient, phone number, prescription date or expiration date in the appropriate box.
6 For spectacles only: Add additional notes in the Notes and Recommendations field. These notes can be entered manually or using the checkboxes in the bottom right corner of the window.

7 For contact lenses only: Confirm/select number of lenses authorized, disinfection method and replacement interval. If the prescription is not being released at this time, use the CL Prescription is not being released because checkboxes to select the appropriate reason(s) for non-release (this action will hide the prescription details). Notes can be entered below the prescription.

8 If blank, enter the doctor's license number in the License # field.

If the prescription was created in the Records module (see Section 8, Medical Records for details), the Doctor's license number is automatically entered in the License # text box. If the prescription was created in the Patients module, you must manually enter the Doctor's license number in the License # text box.

9 When all desired information has been entered or edited, click the Print button to print the prescription.

2.8.4 Ordering Frames

The Frames function lets you create a new frames order, view, edit or remake existing frames orders or delete a frames order.

To view the Frame Page:

1 From the Prescription subpage in the Patient module, use the date menu in the upper right corner to locate the prescription you wish to order.

2 Click the Frames button. The Frames page opens in a new window.

- The most recent frame order is displayed by default. The date of the order is shown in the Order Date menu in the upper right corner of the screen.

- To view frame orders for other dates, select the desired date from the Order Date menu, or click the Previous and Next buttons to scroll through prior frame orders.

Frame orders are “read-only” unless you select to enter a new frame order or edit an existing frame order.

To enter a new frame order:

1 On the Frames Page, click the New Order button.

- Current order information is cleared from all fields, and the screen is write-enabled, allowing you to enter the new frame order.

- The Patient name, Contact # and prescription information is imported into the Frame Page automatically. The Order Date is set to the current calendar date.

2 If this is a VSP order, select the VSP radio button under Options along the right side.

- This action changes the defaults from the standard ones for your practice to the VSP defaults, managed in the Administration module (see Section 9.3.23 on page 9-24 for information about setting up VSP frame order defaults). It will also automatically connect your billing codes to the VSP order when you create your routing slip (see Section 8.7, Routing Slips on page 8-9 for more information).
3 Select the laboratory from which you wish to order the frames from the Lab/Vendor menu, and enter the appropriate phone contact numbers in the Lab Contact # and Lab Order # fields.

4 Enter the Authorization #, the name of the Optician for whom the frame will be credited, the Ordered/Ref.#/Date, and the Expected Date.

For VSP orders, press F9 to select the Authorization # from a list of valid authorizations (see Section 2.7.1, Verifying VSP Eligibility on page 2-10 for more information on VSP authorization).

5 Change the status to Ordered.

6 Select the Spectacle Rx 1, Spectacle Rx 2, Spectacle Rx 3 or PL Sun/CL (plano sunglasses over contact lenses) button for which the frame order is being prepared. You may change the values of the prescription, if desired.

7 Enter the appropriate ordering information in the Frame Selected field.

   ♦ If the Frame UPC entered matches a frame in the Crystal PM inventory (see Section 5, Managing Inventory), the rest of the Frame Selected fields will be filled automatically with the inventory information.

8 If the Lab/Vendor is VisionWeb, click the Configure Lens on VisionWeb button to open the VisionWeb website to process the frame order. Otherwise enter the information in the Lens Selected field.

   Manage your VisionWeb account settings in the Administration module (see Section 9.3.22 on page 9-23 for details). For more information on configuring your lens on VisionWeb, visit www.visionweb.com.

9 Add any additional notes in the Notes to Lab or Notes (not sent to Lab) fields.

10 Select the patient's insurance to the right of the window, and see additional billing information by selecting the Show Balances checkbox.

11 To save the order as part of a routing slip, click the Routing Slip button (see Section 8.7, Routing Slips on page 8-9 for more information).

12 When all desired information has been entered, click the Save button to save the order.

   If you have not saved the order as part of a routing slip (see Step 10 above), the system will ask you if you wish to do that now. Click yes, and it will take you to the Routing Slip screen.

To edit an existing frame order:

1 Select the date of the desired frame order from the Order Date menu at the top of the screen.

2 Click the Edit button.

   ♦ The screen is “write-enabled”, allowing you to edit the existing frame order.

3 Enter or edit ordering information, as desired, as described for entering a frame order. See To enter a new frame order above for more information.

4 When all desired information has been entered or edited, click the Save button to save your changes.

To remake an existing frame order:

1 Select the date of the desired frame order from the Order Date menu at the top of the screen.

2 Click the Remake button.

   ♦ The prescription information is imported into the Frame page automatically.

   ♦ The Order Date is set to the current calendar date.
3 Enter or edit ordering information, as appropriate, as described for enter a frame order. See To enter a new frame order above for more information.

4 Click the Save button to save the frame order.

To print a frame order:
Click the Print Order button to print a copy of the currently displayed order.

To send an order to DVI Remo:
If the DVI Remo program is installed on your workstation, click the Send to DVI Remo button to send the currently displayed order to the DVI Remo program. For more information, see Section 9.3.11, Integrations on page 9-13.

To dispense frames:
When dispensing frames to a patient, simply click the Dispense button on the Frame page. This will open the edit frame page window with the Status changed to Dispensed. When finished, Save the order.

To delete a frame order:
1 Select the date of the desired frame order from the Order Date menu at the top of the screen.
2 Click the Delete button.
   ♦ A confirmation dialog displays the message "Are you sure you want to Delete this Frame Order?"
3 Click the Yes button on the confirmation dialog to delete the order.

Other features:
♦ View Log: Shows a log of all activity that has occurred with this order: when it was created, status changed, otherwise modified, etc.

♦ Save for VSP/Remove from VSP: Saving for VSP sends the information in this frame order/routing slip to the VSP Claim page (see Section 3.7, VSP Claims on page 3-8 for more information). If the VSP option was selected when creating this frame order, the system will automatically Save for VSP. For old orders, use the Save for VSP button to enable this feature, or Remove from VSP to disable it.

2.8.5 Ordering Contact Lenses
The Contacts function lets you create a new contact lens order and to view existing contact lens orders.

To view the Contact Lens Order page:
1 From the Prescription subpage in the Patient module, use the date menu in the upper right corner to locate the prescription you wish to order.
2 Click the Contacts button. The Contact Lens Order page displays in a new window.
   ♦ The most recent contact lens order is displayed by default. The date of the order is shown in the date menu in the upper center of the screen.
To view contact lens orders for other dates, select the desired date from the date menu.

Contact lens orders are read-only unless you select to enter a new order or edit an existing order.

**To enter a new contact lens order:**

1. On the Contact Lens Order page, click the **Create New Order** button.
2. Current order information is cleared from all fields, and the screen is write-enabled, allowing you to enter the new contact lens order.
   - The **Patient** and prescription information is imported into the Contact Lens Orders Page automatically. The **Order Date** is set to the current calendar date, and the **Due Date** is set seven days from the **Order Date**.
3. Select the vendor to whom you will submit the order from the **To** menu.
   - The vendor’s address, **Phone** and **Fax** information from the vendor’s database record will be entered automatically when the vendor is selected.
4. Select the **Contact Lens Rx 1**, **Contact Lens Rx 2** or **Contact Lens Rx 3** button for which the contact lens order is being prepared.
5. Select the appropriate **Quantity** and **Product** type for the order. If the order is for a Warranty replacement, select the **Warranty** checkbox. To view billing information, select the **Show Balances** checkbox.
6. Change the **Status** to **Ordered**.
7. If desired, enter any additional notes related to the order in the **Notes** or **Vendor Notes** fields.
8. When all desired information has been entered, click the **Save** button to save the order.

**To edit an existing contact lens order:**

1. Select the date of the desired contact lens order from the date menu.
2. Click the **Edit** button.
   - The screen is write-enabled, allowing you to edit the existing contact lens order.
3. Enter or edit ordering information, as desired, as described under **To enter a new contact lens order** above.
4. When all desired information has been entered or edited, click the **Save** button to save your changes.

**To change the status of a contact lens order:**

1. Select the date of the desired contact lens order from the date menu.
2. Click the **Change Status** button.
   - The order is write-enabled, allowing you to edit the existing status of the contact lens order.
3. Select the desired status from the **Status** menu.
4. Click the **Save** button to save your changes.

**To print a contact lens order:**

Click the **Print** button to print a copy of the currently displayed order.

**To dispense contact lenses:**
1. Select the date of the desired contact lens order from the date menu.

2. Click the Dispense button.
   - The Status changes to Dispensed with today’s date as the Dispense Date. The will also be write-enabled, allowing you to make any changes as desired.

3. Click the Save button to save your changes.

**Additional Features**

- **Rslip**: To save the order as part of a routing slip, click the Rslip button (see Section 8.7, Routing Slips on page 8-9 for more information).
- **Go to Billing Page**: Instead of clicking Save, click this button to save and go directly to the Billing module for this patient.
- **View Log**: Shows a log of all activity that has occurred with this order: when it was created, status changed, otherwise modified, etc.
- **Print Invoice Header**: If this checkbox is selected, the standard header for invoices will be included on this order.

### 2.9 Patient Notes

The Patient Notes page lets you enter “free-form” notes related to a patient. Three types of notes may be added to a patient’s file; Medical Notes, Personal Notes and Correspondence Notes.

**To view the Patient Notes page:**

Click the Notes tab in the Patients window.

- If desired, click the Full Screen button for any of the three notes lists to expand the list to full screen. Click the Back button from the full screen view to return to normal view.

> Notes are added and edited in the same manner, regardless of the note type.

**To enter a new note:**

1. Click the Add Medical Note, Add Personal Note or Add Correspondence Note button, as appropriate.
   - A blank Edit Comment dialog displays.

2. Enter the note in the text box provided, then click the Create Comment button to add the note to the Patient Notes page.
   - Change the text or background color using the options at the bottom of the Create Comment dialog.

**To view or edit an existing note:**

1. Double-click the note you wish to view or edit.
The Edit Comment dialog displays. The dialog is filled with the full text for the selected note.

2. Edit the note as desired, then click the **Update Comment** button to save your changes.

### 2.10 Files

The Files page lets you attach data files created outside the Crystal PM system to the patient’s file.

**To view the Files page:**

Click the **Files** tab in the Patient window.

- The Patient Files page shows a listing of all external data files currently attached to the patient’s file, including the **Date** it was attached to the patient’s file, the type of file (lab result, etc.), and a description.
- Select the **Display TreeView** checkbox to see these files organized by File Type.

#### 2.10.1 Viewing Patient Files

You can view any external data file that has been attached to a patient's file.

You **must** have a copy of the software that was used to create the external file available on your workstation to view the file (i.e., Microsoft Word must be available on your workstation to view a .doc file).

**To view an attached file:**

Double-click the desired file in the files list. The selected file opens in a new window.

#### 2.10.2 Adding & Managing Patient Files

At any time the file type or description can be edited using the buttons on the right of the screen.

**To attach an external data file to the patient:**

1. Click the **Add Additional File** button.
   - The Add Additional File dialog displays.
2. Enter a description of the contents of the file in the **Description** text box.
3. Click the **Browse** button to locate the file you wish to attach.
4. Select the **Type** from the dropdown menu defaults or enter a new type manually. Defaults are maintained in the Administration module (see Section 9.3.4, **Defaults** on page 9-5 for details).
5. By default, the system will delete the local copy of the file that you are attaching. If you don’t want to delete the file, deselect the **delete local copy of file** checkbox.
6. Click **Add Patient’s File** to finish attaching the external file.

**To attach a printed file to the patient:**

**Twain Scanner:** On the Quick View page, click the **Add Scanned File** button and follow the onscreen instructions.

**External App Scanner:** Ensure the scanner in the system tray is set to scan a file. Press the scan button on your scanner, and then click **Add Scanned File**. Add a description and type, as you would with any file, and then click **Add Patient’s File**.

**To remove a file:**

Select the file you wish to remove and click the **Remove File** button.

### 2.10.3 Online Documents

The **Online Documents** option allows the user to send digital files to a patient use a secure, password-protected web-based file manager. You can attach any file on your hard drive, as well as system files (e.g., education resources) and files from other patients (e.g., to send a minor's file to his/her parent/guardian).

**To send an Online Document**

1. Click the **Online Documents** button from the **Files** tab in the Patient module.

2. Specify a **Username** and **Password**. You will provide both of these to the patient when sending the files.

3. Click **Add File**.

   - The Share Files Online window opens to the **Upload Patient File** tab.

4. To attach a file from your hard drive, click **Find** and browse to the desired file. Enter a **Description** and change the date, if desired. Click **Upload File**.

5. To attach a system file (e.g., an educational resource made available through the Crystal PM system), select the **Assign System File** tab, select the desired file from the dropdown menu, enter a **Description** and click **Assign File**.

   System Files are managed in the Website section of the Administration module (see Section 9.3.24, Website on page 9-25 for more information).

6. To attach a file from another patient, select the **Assign File from Other Patient** tab. Click **Find** to locate the desired patient, then select the file from the dropdown menu, enter a **Description** and click **Assign File**.

7. Close the dialog box.

8. Send the patient an e-mail (or other communication) containing the **Username** and **Password** specified, as well as the **Location of online documents URL** for your practice (see Section 9.3.24, Website on page 9-25 for details).

### 2.10.4 Patient Website

The **Send to Website** option creates a password for the patient to update their own information online.
To send a patient to the patient website:

1. From the File tab in the Patient module, click the Send to Website button.
2. Enter a Passcode manually, or generate it automatically from the patient e-mail, patient social security number or a randomly generated set of numbers.
3. Set the Expiration Date.
4. Click Update Website. The system will upload the login information for this patient to your database.
5. Send the patient an e-mail (or other communication) containing the Passcode specified, as well as the Patient Website URL for your practice (see Section 9.3.24, Website on page 9-25 for details).

To import information updated by a patient:

1. In the Search for Patient dialog (see Section 2.2, Adding & Searching for Patients on page 2-1) click the Import Patient from Web button.
   - Any patient who has updated his/her information will appear in the Import Patients from Website dialog.
2. Double-click the patient whose information you would like to update.
   - The Patient View Changes dialog shows the Current Values (values currently in the system), Website Values (values updated by the patient), and the Updated Values (values approved to be added into the system) for the patient’s basic information (Patient tab) and their medical history (Medical History tab).
3. Ensure that you are happy with all changed values, clicking the right arrow button next to an item to send that item to the Updated Values column.
4. When finished, click Update Patient to approve changes, or Create Patient if this information is for a patient not yet in the system.

2.10.5 Additional Features

The latest version of Crystal PM includes a number of additional features to make integration with external files as seamless as possible. These features are described as follows:

- **Send Word Document**: Use this option to cull patient information from the selected file and send it to a predefined MS Word template (see Section 2.10.6, Sending Patient Information to a Word Template below and Section 9.3.14, MS Word on page 9-16 for more information).
- **Show Patient Log**: Opens a new window that shows all changes to the patient record over the life of the patient file.
- **Print Address/Billing/Folder Label**: Print labels for physical files, mailings, etc.
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- **Continuity of Care Record:** Allows data entry from external sources and generation of messages for government agencies. Also lets you save the patient information to send to another doctor.

- **Show Tasks:** Shows all Tasks connected to the patient (see Error! Reference source not found.Error! Reference source not found., Tasks for more information).

2.10.6 Sending Patient Information to a Word Template

If you have Microsoft Word 2002 or later installed on your computer, this feature allows you to use MS Word’s mail merge function to automatically send patient information to a previously created Word template.

Instructions on creating Word Templates for use with this feature are in the Administration module (see Section 9.3.14, MS Word on page 9-16).

**To send patient information to a Word template:**

1. Click the Send Word Document button.
2. Locate and select the desired template file, then click the Open button.
   - The selected template file is opened in Microsoft Word, and any variables in the template are replaced with the appropriate patient information taken from the patient’s file.
   - When formatting of the template file is completed, the Add Correspondence Note dialog displays.
3. If you wish to add a correspondence note, edit the default note text and click the OK button.
   - The correspondence note is added to the Patient Notes page (see Section 2.9, Patient Notes on page 2-18 for details).
4. If you do not wish to add a correspondence note, click the CANCEL button on the Add Correspondence Note dialog.

2.11 Patient Status

The Status page provides an overview of the current status of all prescriptions, frame orders, contact lens orders and invoices. Double-click on any orders to open up the order in a new window.
SECTION 3

Billing

3.1 Overview

The Billing module provides the tools to create invoices and process payments made on a patient’s account by the patient or his insurance provider.

To display the Billing window:

Click the Billing button in the Main Toolbar.

- The View/Print Old Invoices Billing page for the currently selected patient displays.
- If no patient is currently selected, the Search for Patient dialog displays, allowing you to select the desired patient, or add a new patient to the database (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).

To select a new patient while in the Billing module, click the $ button in the Main Toolbar to display the Search for Patient dialog.

3.1.1 Importing Information from a Routing Slip

If a Doctor has created a Routing Slip for a patient (see Section 8.7, Routing Slip on page 8-9 for details), an advisory dialog displays the message “There is a Routing Slip available would you like to turn it into an Invoice?” Click the Yes button to import the information from the Routing Slip into a new invoice (see Section 3.3, Creating a New Invoice for Patients on page 3-3 for details). Click the No button to open the View/Print Old Invoices Billing page for the patient (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

3.1.2 Creating a Patient Recall

The Patient Recall button on the Billing page is a shortcut that lets you create, edit, or delete a recall (follow-up appointment) for the currently selected patient from the Billing screen, rather than having to leave to a new screen. See sections 2.6.4 and 9.3.16 for more information on patient recalls.
3.2 Viewing and Printing Invoices

When you first access the Billing module for a patient, the View/Print Old Invoices page displays (except when importing information from a Routing Slip, as described in Section 3.1.1 above). Initially, the screen displays general information regarding the patient’s account. To view a specific Invoice, you must select the desired invoice from the Date of Service menu.

The Overall Balance – the total amounts owed by the Patient and by Insurance for all outstanding invoices for the patient – is shown in the upper right corner of the screen. (Not to be confused with the Invoice Balance, described below.)

To view an invoice:

Select the desired Invoice from the Date of Service menu, which lists all invoices connected to the current patient. Alternatively, you can search for the invoice # by clicking Find Invoice in the Invoice # box.

The View/Print Old Invoices screen provides the following information:

- **Invoice Notes** appear in the upper right corner, below the Overall Balance. Invoice notes do not appear on the printed invoice. Edit this note using the Edit Invoice button.

- **Invoice Footer** is the text that appears at the bottom of the printed invoice. Edit this text using the Edit Footer button.

- **Diagnosis** - shows the diagnostic code(s) (Diag Code) and Description(s) for the diagnosis made during the examination for which the Invoice was prepared.

- **The billing window** shows, for each line item, the billing code (Bill Code) and procedure code (CPT) for each procedure/item billed on the Invoice, a Description of each billing (or patient payment made against the Invoice), the Employee credited for vision-related sales, the Insurance provider billed for the sale/service, the Amount due for the service. To the right are amounts itemized by Discount, amount owed by the Insurance, and amount owed by the Patient for each item.

  Change the appearance of the billing window using the View/Print Options at the bottom of the screen. The Custom View is managed in the Invoices section of the Administration module (see Section 9.3.13 on page 9-15).

- **Invoice Balance**, in the bottom right corner, shows the amounts owed by the Patient and by Insurance for the current invoice. Not to be confused with the Overall Balance (the amount owed for all outstanding invoices).

To print an invoice:

Click the Print Bill/Receipt button in the bottom left corner of the screen.
3.3 Creating an Invoice

Use the Create New Invoice function to create a new invoice for the currently selected patient.

See Section 3.2, Viewing and Printing Invoices above for more background information on the fields shown in this window.

To create a new invoice:

1. If necessary, select the patient for whom you wish to create a new Invoice (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).

2. Click the Create New Invoice button.
   - The Invoice Balance field shows the amounts owed by the Patient and by Insurance for the current Invoice for the currently selected patient. Initially, this field shows balances of “0.00.” The Invoice Balance updates automatically as items are added to the Invoice.

3. Select the Doctor with whom the Invoice is associated from the Physician menu.

4. If appropriate, select the name of the Staff member who should be credited with “Optician-related sales” for the Invoice from the Staff menu.

5. If desired, enter any notes related to the Invoice in the Invoice Notes field. Invoice Notes do not appear on the printed version of the Invoice.

6. Click Edit Diag to add or remove diagnostic codes for the examination with which the invoice is associated (see Section 3.3.1, Adding, Editing & Removing Diagnosis Codes on page 3-3 for details).

7. Enter the Billing codes to be included in the Invoice (see Section 3.3.2, Adding and Editing Billing Codes on page 3-4 for details).

8. When all desired information has been entered, click the Save Invoice button to save the Invoice to the Crystal PM database.

3.3.1 Adding, Editing & Removing Diagnosis Codes

Diagnosis codes are used to enter the diagnosis made for the patient on the associated day of service.

To add, edit or remove diagnosis codes:

1. Click the Edit Diagnosis button. The Add Diagnosis Code dialog displays with three windows:
   - The left window displays the popular diagnoses in your practice, managed in the Administration module (see Section 9.3.5, Diagnosis Codes on page 9-6 for details). Select one and click the right arrow to add it to the current diagnosis.
The center window displays the current diagnoses for the patient. Select one and click Remove Diagnostic Code to remove it from the current diagnosis.

The right window displays all possible diagnoses, organized by Diagnosis Code and Description. Search for the diagnosis by scrolling or by typing in the diagnosis or description, and then click the left arrow to add it to the diagnosis.

When all desired diagnosis codes have been added to the list, click the Close button to close the Add Diagnosis Code dialog and return to the previous Invoice.

3.3.2 Adding and Editing Billing Codes

Billing codes are used to enter billing information for chargeable services and/or sales made on the day of service.

To add a billing code:

1. Click a blank line in the billing code section of the Invoice.
   - The Billing Codes list displays.

2. Enter a partial or complete billing code, procedures code or description in the Bill Code, Proc Code or Description text boxes, as appropriate.
   - The list will scroll to the billing code that most closely matches your search criteria.

For billing codes that will affect your sales inventory, see Section 3.3.3, Product Sales below.

3. Click the desired billing code to add the code to the Invoice.
   - The billing code, procedure code, description and billed amount are automatically entered in the Bill Code, Proc Code, Description and Amount fields, as appropriate.
   - If the billing code is configured to accept Optician sales, and an Optician was selected for the Invoice, the Optician’s name is automatically entered in the Optician field for the associated billing code.

4. If Insurance is available for the currently selected patient, choose the desired Insurance provider in the Insurance field. The Billing Codes field will refresh to display the following additional Insurance-related billing information:
   - Ins Est - the estimated amount you plan to receive from the Insurance provider.
   - Copay - the copay amount that the patient owes.
3. Ins DSCT - the amount by which you are discounting the normal amount billed for the procedure.

4. Pat Resp - the amount the patient owes other than the copay or overage.

5. Overage - the amount of overage owed by the patient (usually on frames).

6. Overage DSC - the amount you must discount on the overage (some Insurance providers require you to discount a certain amount of the overage).

7. Pat Tot - the total amount owed by the patient: equal to the sum of the Copay, Pat Resp and Overage fields less the amount in the Overage DSC field.

You may edit any Insurance-related billing amount except the Pat Tot. This field will adjust automatically in response to adjustments to other related fields.

5. Repeat steps 1 through 4 to add additional billing codes to the Invoice.

To remove a billing code:

Using the right-hand mouse button, click the billing code you wish to remove, and select Delete from the shortcut menu.

3.3.3 Product Sales

For frames, contact lenses, and other products to be managed properly by the Inventory module (see Error! Reference source not found.), you will need to include the product UPC as part of the invoice.

1. Select the billing code that relates to product (Frames ...). Click the <tab> key to go to the next column.

   - A pop-up window will ask for the UPC.

   In order for this function to work properly, the billing code must be set up to associate with physical inventory. This is done by ensuring either the Frame or Contact Lens or Misc checkboxes are selected (set to Yes) when viewing the code in Billing section of the Administration module (See Section 9.3.1 on page 9-2).

2. Enter the Frame UPC, or click Look in Inventory to browse for the correct product.

3. When the correct product has been identified, click OK.

4. When you ultimately save the invoice, the system will remove the product(s) from the inventory.

3.4 Editing an Invoice

Once an invoice has been saved, you can change or edit most elements:

- The Date of Service, Physician, or Staff employees associated with the invoice can all be changed.

- Diagnosis codes can be added or deleted as desired.

- Billing codes may not be deleted, but they can be voided or changed (see Section 3.4.2 below) and new billing codes can be entered as desired.

3.4.1 To Edit an Invoice

1. Click the View/Print Old Invoices button.
The screen refreshes to display the View/Print Old Invoices screen (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

2 Select the desired Invoice from the Date of Service menu, which lists all Invoices created for the currently selected patient.

3 Click the Edit Invoice button at the bottom of the screen, below the billing window.

4 Make all changes as desired.

5 When all desired changes have been made, click the Update Invoice button to save your changes.

### 3.4.2 Voiding or Changing Transactions

The following instructions are for voiding or changing billable item transactions. The procedure for voiding or changing payments are the same, though the Edit Payment window is different than the Edit Transaction window. Note that valid payment transactions appear in green type, regardless of whether or not they have been modified.

1 Open the invoice for editing (see Section 3.4.1 above for details).

2 The Line Item list (on the right above the billing window and just below the Invoice Footer) shows all current transactions for the Invoice.

3 Double-click the billed item transaction you wish to void in the Line Item list.

   - The Edit Transaction window will open for a billable item, or the Edit Payment window for a payment item.

4 To modify a transaction, change the Bill Code, Description, Quantity, CPT, Modifier, D1–4, Insurance or Billing Amounts as desired, and click Update.

   - Modified transactions appear in blue type.

5 Click Void Transaction to void a transaction entirely.

   - Voided transactions appear in red type.

   You can “unvoid” a previously voided transaction using the same steps. When a transaction is “unvoided”, the transaction is displayed in normal type.

### 3.5 Voiding an Invoice

If necessary, you can void an entire invoice.

You must enter the Master Access password in order to void an invoice. Voiding an Invoice removes it from the system. Once an invoice has been voided, it cannot be restored.

**To void an Invoice:**

1 On the main Billing page, select the Invoice you wish to void from the Date of Service menu.

2 Click the Void Invoice button.
3. Enter the Master Access password in the text box provided, then click the OK button.

4. A confirmation dialog displays the message “Are you sure you want to Void this Invoice?” Click the Yes button to void the Invoice. (Click the No button to cancel the operation.)

If any Inventoried items were associated with the Invoice, an advisory message displays indicating that the items were returned to the Inventory. Click the OK button to close the message.

3.6 Working with CMS Claims

To display the CMS Form:

1. Access the Invoice for which you wish to create the CMS Form (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

2. Click the CMS 5010 button.
   - If the claim has multiple invoices, a shortcut menu displays, listing all insurance providers associated with the current Invoice. Select the desired insurance provider from the shortcut menu to continue.
   - The CMS Form opens in a new window, pre-populated with information from the Patient Information and Additional Information page from the Patient module (see Section 2, Managing Patients for details), as well as the billing information on the currently selected Invoice.

3. To edit any field on the CMS Form simply select and overwrite the current information. Click the ReGenerate button at any time to delete any changes and re-import the pre-populated patient and billing information into the form.

Printing & Saving the CMS Form

Two options are provided for printing the CMS Form:

- **Print Claim (information only)** - this option prints the information portion of the displayed form only (less background). When this option is selected, a shortcut menu displays the options Template 1, Template 2 and Defaults. Select the desired option to print the form.

In most cases, Template 1 is the desired options. This template is used when printing on one of the traditional "red" CMS 5010 Forms.
Print Claim (including background) - this option prints the information portion of the displayed form and the form background.

This printing option is not accepted by all Insurance providers (some require the “red” form. Check with the Insurance provider before selecting this printing option.

To save the CMS Form data to a text file on your local workstation, click the Write to File button and then save the text file in the desired location.

You can also add the currently displayed CMS Form to the “batch file” for electronic claims processing through the Administration module (see Section 9.3.6, Electronic Claims on page 9-8 for details).

- To add the form to the batch file, click the Add to Batch button.
- To remove the form from the batch file, click the Remove from Batch button.

The Write ANSI button is a feature that will be available in a future release of the software.

3.7 VSP Claims

Use the VSP Claim button at the bottom of the invoice window to submit a claim through VSP. This window is structured the same as the Eyefinity website (used for manually processing VSP Claim), and provides the option to send all required information to VSP.

To process a VSP Claim:

At any time while the VSP Claim Window is open you can save the information to return to it at a later time. This is done by selecting the Status tab at the top of the window and clicking Save Claim. To load a saved claim, select the desired claim in the Saved Claims list and click Load Claim.

1 Access the Invoice for which you wish to create the VSP Claim (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).
2 Click the VSP Claim button.
   - The VSP Claim Window opens in, pre-populated with the patient, prescription, frame order and billing information associated with the current patient/invoice.

   All fields in blue are required.

3 If not already imported, select an Authorization Code from the dropdown menu at the top of the screen, which lists all active authorizations from the VSP verification process (see Section 2.7.1, Verifying VSP Eligibility on page 2-10 for details) or type in a valid authorization number.

4 Fill in any missing required information on the Patient Info tab.
5 Click on the Diagnosis/Services tab and fill in all required information.
   - Any diagnosis codes associated with the current invoice will be automatically imported into the Diagnosis or Nature of Illness fields. If none, enter the diagnosis codes here.
If an exam was performed, select the **Exam Service** checkbox and fill in the required information.

6 Fill in all required information on the **Prescription** tab.
   - Prescription information will automatically import from the Frame Order page (see Section 2.8.4, *Ordering Frames* on page 2-15 for details). Select a different **Prescription** date if desired.
   - Click **Edit Rx** to change the prescription for this claim without changing the information elsewhere in the system.
     - This option is designed to support practices that insert notes or unconventional prescription data, since any information not recognized by VSP could result in a rejected claim.

7 Fill in all required information on the **Lens** and **Frame/Contacts** tab.
   - Information will automatically import from the Frame Order page (see Section 2.8.4, *Ordering Frames* on page 2-15 for details). If you have old non-VSP frame orders it will match the information as closely as possible. Insert any additional information desired.
   - In the **Customary Fees** fields, enter the amounts you would ordinarily charge this patient if this were a non-VSP claim.
     - This data is required to submit the claim, but is used by VSP for statistical purposes only. It will not affect whether your claim is accepted or rejected.

8 Select the **Add'l Info** tab and fill in any additional relevant information that applies.

9 Return to the **Diagnosis/Services** tab and click **Calculate Order**.
   - This action searches the billing codes for relevant procedure codes.

10 For each billing code, select the appropriate procedure code from the dropdown menu and click **Select**.

11 In the **Diagnosis** fields, enter the number of the field under **Diagnosis or Nature of Illness** to which that procedure code applies.
   - If this information was already on the invoice/billing code, it will populate automatically.

12 Enter the amount **Paid** by the patient and the **Customary Fee** (see Step 7 above for more information about customary fees).

13 Click **Submit Claim**.

**To check the status of submitted claims**

1 From the billing window, click the **VSP Claim** button.

2 Click on the **Status** tab at the top of the VSP Claim Window. Access the Invoice for which you wish to create the VSP Claim (see Section 3.2, *Viewing and Printing Invoices* on page 3-2 for details).

3 Select a claim from the **Submitted Claims** list and click **Update Status**.
   - The **Doctor Service Report** displays a report on the product/service you filled out, which you can then print or save for traditional record keeping purposes.
   - **Packing Slip** button prints a packing slip to include in packages being sent to patients.
3.8 Processing Payments

You can only enter one form of payment at a time. If you wish to enter multiple payments, you must save the payment and then re-enter the Make a Payment screen to enter a new one.

3.8.1 To Process a Payment

At any time while processing a payment you can make an insurance adjustment by clicking the Insurance Adjustment button at the bottom of the screen. See Section 3.8.2 below for details.

To process payments made by patients or insurance providers against an existing invoice:

1. If necessary, select the patient for whom you wish to process a payment (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).
   - The Billing page for the selected patient displays (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

2. Select the Invoice for which you wish to process a payment from the Date of Service menu.

3. Click the Make Payment button at the bottom of the screen. The screen refreshes to display the Make a Payment screen for the currently selected invoice, with the total Patient and Insurance balances to the left of the payment window.

4. Select the Payment Type: Cash, Check, Credit Card, Insurance, or Other.
   - The Other payment option lets you apply a customizable payment (such as a billing adjustment or refund) to either the patient’s balance or the Insurance provider’s balance.

5. Fill in the Amount of the payment and all other fields as required.
   - The value shown in the Resulting Patient Balance or Resulting Insurance Balance fields will update to reflect the payment.

6. Click Save Payment.
   - If an Insurance payment was made that did not reduce the Resulting Insurance Balance to zero, a pop-up window will ask if you wish to reconcile the difference. Click Take Action to reconcile the difference by making an insurance adjustment (see Section 3.8.2 below for more information) or click No Action to close the window.
3.8.2 Making an Insurance Adjustment

If the Insurance Amount for the currently selected Invoice does not match the Insurance Balance, you can make an Insurance adjustment either by clicking the Insurance Adjustment button at the bottom of the Make a Payment screen (see Section 3.8.1 above), or by clicking Take Action when the system asks if you’d like to reconcile the insurance amounts.

*From the Insurance Adjustment Screen:*

1. Select the insurance provider for which you wish to make an adjustment from the menu provided.
   - The Remaining Insurance Balance field updates to show the balance for the selected insurance provider.

2. Use the Write Off option to write off funds you do not expect to receive.

3. Use the Transfer to Patient option to move funds to the Remaining Patient Balance for the patient to pay.
   - Select the Apply Discount checkbox to reduce the amount the patient will owe. The system will automatically write off the discounted amount.

4. Use the Transfer to Insurance to move funds to a different insurance provider.

5. Click the Save button to save all adjustments made above.

3.8.3 Customizing Payment Details

Often, checks from insurance companies will itemize how much it is reimbursing for each procedure performed. You can track this information using the Customize Payment Details button at the bottom of the Edit Payment window. This feature can be used any time multiple billing codes are associated with a single payment.

1. Open the Payment Window by selecting the payment in the main Billing Code window and clicking the Edit Payment Detail button.
   - Note that although you can perform the following steps by clicking Edit Payment Detail from the main billing window, in order to change the total amount paid or to void the payment, you must edit the invoice, following the steps in Section 3.4.2, Voids or Changing Transactions on page 3-6.

2. Click Customize Payment Details.
Select the checkbox for each Billing Code to which to apply the payment, and then change the amount in the box that appears next to that line.

- As the values change, the amount will apply to a particular billing code rather than to “Unknown”.

### 3.8.4 Mass Insurance Checks

If an insurance company sends a single check for multiple patients, you must use the **Mass Insurance Checks** function in order to split up the payment to the different patients. Details for using this feature are in Section 7.2.10, **Insurance Receivable Report** on page 7-10.

### 3.9 Transaction History

The **Transaction History** function lets you view a listing of all transactions (charges made to the patient, and payments made by the patient) for the currently selected patient.

Special features of this function include:

- **Printed Full Transaction History or Selected Transactions**: Hold down the <Ctrl> key on your keyboard to select multiple transactions, and then click the **Printed Selected Trans** button to print only the selected transactions.

- **Print Past Due Transactions**: Prints only those transactions that have not been paid and are past due. Use the **Print Past Due Trans** or **Print Past Due Trans w/o Pay and Ins** buttons.

- **Highlight Past Due Items** using the checkbox at the bottom of the screen.

- **Display Insurance Amounts**: Adds a column to the right of the transaction window showing the running balance for that insurance company.

### 3.10 Product Returns

Returning a product adds it back into the inventory (see Error! Reference source not found., **Inventory for more information**) and refunds the amount in the **Patient Balance**.

**To return a product:**

1. Open any invoice, using the **Date of Service** menu.
2. Click the **Product Return** button below the billing window.

- A new window opens showing all items billed to the patient in chronological order.
3 Select the item(s) to return and click the *Return Selected Items* button at the bottom of the screen.

- A new invoice will be created for the current date, with the return listed in *purple*. The original invoice(s) will be modified to add the word *RETURNED* in the *Description* line for each returned item.
- The returned item(s) will be added back into the inventory, if applicable (see Error! Reference source not found.. *Inventory* for more information).

4 Finish processing the return by using the *Make a Payment* function, entering negative amounts to balance the invoice.
SECTION 4

Tasks

4.1 Overview

The Tasks module provides an easy means of notifying office staff of daily tasks, announcements, appointments or other important information.

4.2 The Tasks Window

The Tasks window shows a list of Daily Tasks (reminders that have been entered for the current calendar date). Tasks are listed in the order in which they were entered. Messages are color-coded based on the type and current status of the message.

To display the Tasks window:

When you first launch Crystal PM, the Tasks window displays by default. To return to the Tasks window from another module, click the Tasks button in the Main Toolbar.

From the Tasks window, you can choose to:

- Enter a new task message
- Schedule a recurring task
- View the full text for an existing task message
- Edit an existing task message
- Sign-off on an existing task message

4.2.1 Types of Tasks

The Tasks feature supports four types of task messages. Assigning a type to a task message lets you differentiate between “normal” tasks, important messages and messages that require acknowledgement by a staff member. The four types of task messages are:
4.3 Entering Tasks

Tasks must be entered for the specific date on which you wish them to display. The number of days for which a task is displayed depends on the task type. Messages are entered using the data fields below the Daily Tasks list on the Tasks window.

To enter a new task message:

1. Select the desired task type from the Type menu; either Announcement, Important, Sign-Off or Keep Active Until Signed Off
   - The default task Type is Announcement.

2. Select the date on which you wish the task to be displayed from the Date menu.
   - The default Date is the current calendar date.

3. Enter the desired task message in the Text box.

4. Click the Assign to Employee and/or Assign to Patient link to connect this message to a particular employee or patient, respectively.

5. Click the Create Task button to save the task message.
   - The Tasks window refreshes to display the added task message.

4.3.1 Entering Recurring Tasks

If desired, you can create a recurring task. Recurring tasks are displayed on multiple days according to the schedule you define.

To schedule a recurring message:

1. Create a new task, following the steps above, but clicking the Create Recurring Task instead of the Create Task button.
   - The Create Recurring Task dialog displays.
2 Select the Pattern radio button for the basic time increment by which you wish to schedule the recurring message; either Daily, Weekly, Monthly or Yearly, then specify the frequency for the message, as appropriate.

![Create Recurring Task Dialog]

Each Pattern has a unique set of data fields that allow you flexibility in scheduling the frequency by which the recurring message is displayed.

3 Select the period of time during which you wish the message to be repeated using the Length data fields.

- Select the first date on which you wish the recurring message to display from the Start Recurrence menu. The default Start Recurrence date is the current calendar date.

- To repeat the recurring message a specified number of times, select the Create a Total of [ ] radio button, then select the number of messages you wish to create from the associated menu.

- To repeat the recurring message for a specified time period, select the Repeat Until End Date [ ] radio button, then select the last date on which you wish the recurring message to display from the associated menu. The default Repeat Until End Date is the current calendar date.

4 Click the Create Recurring Task button.

- The Create Recurring Task dialog closes, and the Reminders window refreshes to display the added reminder message, as appropriate.

### 4.4 Viewing and Editing Tasks

#### 4.4.1 Viewing Tasks

In the case of long task messages, the full text of the message is not shown in the Daily Tasks field of the Tasks window. You must open the View Reminder dialog for these messages to view the full text of the task.

**To view a task:**

From the Tasks window, double-click the task message you wish to view.

- The View Reminder Dialog displays.

- The full text of the task message is shown in the text box at the top of the dialog.

Click the `X` button to close the View Reminder Dialog.
If you wish, you can append text to a task message (see Section 4.4.2, Editing Tasks on page 4-4 for details).

When you display the View Reminder dialog for a Sign-Off or Keep Active Until Signed Off task, the View Reminder dialog includes a Sign-Off menu (see Section 4.4.3, Signing Off On Tasks on page 4-4 for more information).

4.4.2 Editing Tasks

If you wish, you can append text to a task message. This feature is especially useful when working with “sign-off” tasks, when it may be desirable to include details related to accomplishment of the task for which the task was set. Task messages are edited from the View Reminder dialog.

To edit a task:

1. Display the View Reminder dialog for the task for which you wish to sign off (see Section 4.4.1, Viewing Tasks on page 4-3 for details).
2. Enter the text you wish to append to the task message in the Text to Append text box. You may wish to include your name or initials at the beginning of the additional text, so other users will know who appended the task.
3. Click the Update Reminder button.
4. The View Reminder dialog closes, and the Task window refreshes to display the appended text.

4.4.3 Signing Off On Tasks

When you view a Sign-Off or Keep Active Until Signed Off task, the View Reminder dialog includes a Sign-Off menu. The menu contains a list of all employees defined for your system. You must select your name from the Sign-Off menu, and update the task to complete the sign-off process.

The list of employees shown in the Sign-Off menu is maintained by your System Administrator.

To sign-off on a task:

1. Display the View Reminder dialog for the task for which you wish to sign off (see Section 4.4.1, Viewing Tasks on page 4-3 for details).
2. If desired, append additional text to the task message (see Section 4.4.2, Editing Tasks on page 4-3 for details).
3. Select your name from the Sign-Off menu.
4. Click the Update Reminder button to complete the sign-off process.
   - The View Reminder dialog closes, and the Task window refreshes with the message shown in green “strike-through” type and your name entered in the Sign Off column.

4.5 Moving and Deleting Tasks

Tasks can be moved to a new day or deleted from the system by Administrative staff only. See Section 9.3.20, Tasks on page 9-23 for more information.
SECTION 5
Managing Schedules

5.1 Overview

The Schedule module manages doctors’ and other staff members’ schedules. Daily (default), Weekly and Monthly viewing options are available, and a Search function lets you locate available times for scheduling patient appointments.

To display the Schedule window:

Click the Schedule button in the Main Toolbar.

5.2 Viewing Schedules

5.2.1 The Daily Schedule

The Daily Schedule page provides a quick view of all scheduled appointments for all Doctors and staff members for the currently selected day.

- The schedule is divided into 15-minute increments, with the screen centered on the current time-of-day.
- Each appointment on the schedule shows the name of the patient and the billing code (if one was specified when the appointment was set).
- The Color Code provides a visual means of distinguishing the current status of each time block (see Section 5.2.4, Managing the Color Code on page 5-3 for details).
- To view the schedule for another day, select the desired day on the calendar in the top-left of the window.

Using the Daily Schedule:

- To schedule an appointment, right-click at the desired time for the desired doctor and select Make Additional Appointment from the shortcut menu (see Section 5.4.1, Setting an Appointment on page 5-4 for details on scheduling appointments).
- To view or edit appointment information for a currently scheduled appointment, double-click the desired appointment.
To view the patient file for any patient, right-click, then hover over the desired patient’s name and select **View Patient** (see Section 2.4, *Quick View* on page 2-3 for more on the patient Quick View page).

To view the billing information for any patient, right-click, then hover over the desired patient’s name and select **View Billing** (see Section 3, *Billing* for details on patient billing).

To view medical records for any patient, right-click, then hover over the desired patient’s name and select **View Records** (see Section 8, *Records* for details on medical records).

### 5.2.2 The Weekly Schedule

The **Weekly** Schedule page provides a “quick view” of all scheduled appointments for a **single** Doctor or staff member for the currently selected week.

- To view the schedule for a different staff member, or for a different week, use the options at the top of the calendar.
- Otherwise, the **Weekly** schedule works identically to the **Daily** schedule.

### 5.2.3 The Monthly Schedule

The **Monthly** Schedule page shows a quick view of the number of appointments scheduled for a selected staff member during a selected month.

**Using the Monthly Schedule:**

- To view the schedule for a different staff member, or for a different week, use the options at the top of the calendar.
- To schedule an appointment for the currently selected **Provider**, right-click on the desired date and select **Create New Appointment** (see Section 5.4.1, *Setting an Appointment* on page 5-4 for more on scheduling appointments).
- To view the Daily or Weekly Schedule page for a currently displayed date, right-click and select **Show Daily View** or **Show Weekly View**.
5.2.4 Managing the Color Code

The Color Code provides a visual means of distinguishing the current status of each time block on the Daily and Weekly Schedule screens. Each status can be assigned a unique color. Available status/appointment values and the currently assigned color code for each status/appointment are shown on the left of the Daily Schedule screen.

The system is preconfigured with default colors for each available status/appointment category. If desired, you may change the color code for any status/appointment category by clicking on the color in the color code.

Access to the color code maintenance is password protected.

There are two types of color codes: Status and Appointment Type, which are toggled with the Display Appointment Type checkbox.

Available Status values are:

- **Available** - the staff member is available to accept a patient appointment.
- **Off/Lunch** - the staff member is unavailable to accept patient appointments (usually for lunch/break time)
- **Signed In** - a patient on the schedule has signed in at the front desk.
- **Signed Out** - a patient has been checked out/billed out by the front desk.
- **Confirmed** - the patient has been called and has confirmed the scheduled appointment.
- **Left Message** - the patient has been called and a message was left to confirm the appointment.
- **Unconfirmed** - the patient has not been called or confirmed.

This is the default color an appointment when it is first created.

- **Conflict** - there are more than two appointments scheduled for the same time.
- **Missed** - the patient has missed a scheduled appointment without calling in to cancel beforehand.
- **Template** - indicates times in the schedule when certain appointment types should be scheduled (for example, a Doctor may wish to schedule appointments for Glaucoma patients between 10:00AM and 12:30PM). This color code serves as a reminder to the front desk.
- **Canceled** - the patient has canceled the appointment that was scheduled at this time.
- **Year-Out** - the Year-Out checkbox was selected when this appointment was booked (usually used to indicate that the appointment was booked a long time in advance).

Appointment Type values are managed in the Schedule section of the Administration module (see Section 9.3.19 on page 9-21 for details).

Display Invoices – if selected, each appointment will show, next to the patient name, the number for any invoice assigned to that patient on that day.
5.3 Searching for “Available” Time

The Search page lets you search for available times for a selected Doctor for the purpose of scheduling future appointments.

To search for available time:

1. On the Schedule screen, select the Search tab.
2. Select the name of the Doctor or other staff member for whom you wish to locate “available” time from the Provider menu.
   - The Provider menu lists all staff members for whom patient appointments can be scheduled.
3. Enter the starting date from which you wish to search for “available” time in the From Date field.
4. Select the length of time needed for the appointment from the Duration menu. Selections range from 15 min to 2 hours, in 15 minute increments.
5. Use the Sunday through Saturday checkboxes to select the days of the week to include in the search, or click Any Weekday.
6. Click the Search button to submit your search.
   - The Search screen refreshes to display a list of dates for a two week period (beginning on the specified From Date) on which there is available time to schedule patient appointments.
7. Double-click a line in the listing to view the Daily Schedule page for the selected date.

5.4 Managing Appointments

5.4.1 Setting an Appointment

The Make Appointment dialog is used to create new appointments for a patient and to edit existing appointments. You can display the Make Appointment dialog from the Daily (see Section 5.2.1 on page 5-1), Weekly or Monthly (see Section 5.2.3 on page 5-2) schedule pages.

To set an appointment:

1. Open the Make Appointment dialog from the Daily, Weekly or Monthly Schedule page.
2. Enter the desired Date and Start Time at the top of the window.
3. Select the Doctor or other staff member from the Provider menu.
4. Add billing codes to the appointment if desired (see Section 5.4.2, Adding Billing Codes to an Appointment on page 5-6 for details).

5. Enter the length of time you wish to schedule for the appointment (in 15-minute increments) in the Duration text box.
   - If billing codes were added to the appointment (see Section 5.4.2, Adding Billing Codes to an Appointment on page 5-6 for details), the Duration text box shows the total number of minutes for all billing codes added to the appointment. You can modify the appointment Duration as desired.

6. Select the appropriate appointment Type from the dropdown menu, if desired.

7. Enter the name of the patient for whom you wish to schedule the appointment in the Patient field, as follows:
   - When an existing patient is selected for an appointment or a new patient is created for an appointment, the Alerts field populates automatically with any relevant alerts, and the Notes field populates automatically with the patient’s name and home and work phone numbers. You may edit the content of the Notes or Alerts fields as desired.
   - At any time you can view additional information on the patient, including primary provider, guardians, birthdate, and insurance information, by clicking the Show Demo button.
   - If a patient is currently selected, the Patient, Note and Alerts fields are prefilled with the appropriate information.
   - If no patient is currently selected, or you wish to schedule the appointment for a different patient than the one currently selected, click on the dropdown menu and find the patient or create a new patient, as required (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).
   - Select None to schedule time for a patient whose name you do not know, or if you wish to block out time when a doctor will not be seeing patients.
   - Select Template to reserve a block of time for a particular activity (for example, surgeries on Thursday afternoons). When using this option, enter the template name in the first row of the Notes section.

8. Change any Notes or Alerts as desired.
   - Changes made in the Notes or Alerts fields will not affect the patient’s record.

9. If desired, you may use the Recurrence button to set “recurring appointments” for the current patient (see Section 5.4.3, Setting a Recurring Appointment on page 5-6 for details).
   - Recurring appointments are generally used by vision therapists who wish to see a patient at regular scheduled intervals, or when creating a template.

10. Add any Flags required by selecting the radio buttons at the bottom of the Make Appointment window.
When all desired information has been entered, click the **Save Appointment** button to save the appointment to the schedule and return to the Schedule, or click the **Patient, Billing, or Records** buttons to save the appointment and go to the selected page for that patient.

The **Confirmed** and **Status** fields are used when editing appointments (see Section 5.4.5, **Editing Appointments** on page 5-7 for details).

### 5.4.2 Adding Billing Codes to an Appointment

Billing codes can be added to an appointment to make the Doctor aware of the reason for the appointment. Adding billing codes to an appointment is *optional*. You may also remove billing codes that were previously added to an appointment.

**To add a billing code to an appointment:**

1. On the Make Appointment dialog (see Section 5.4.1, **Setting an Appointment** on page 5-4 for details), click the **Add Billing Code** button.
   - The Add Billing Code dialog displays.

2. Select the desired billing code or billing code description in the **Billing Code** or **Billing Text** menu.

3. Click the **OK** button.
   - The Add Billing Code dialog closes, and the selected billing code and description are added to the Billing Code list on the Make Appointment dialog.

Each billing code has a number of minutes associated with it. By selecting a series of billing codes, the total duration of the appointment will calculate automatically.

**To remove a billing code from an appointment.**

1. On the Make Appointment dialog (see Section 5.4.1, **Setting an Appointment** on page 5-4 for details), click the billing code you wish to remove from the Billing Code list; the selected billing code will be highlighted.

2. Click the **Remove Billing Code** button.

### 5.4.3 Setting a Recurring Appointment

Recurring appointments are generally used by vision therapists who wish to see a patient at regular scheduled intervals, or when creating a template.

**To create a recurring appointment:**

1. From the Make Appointment dialog (see Section 5.4.1, **Setting an Appointment** on page 5-4 for details), click the **Recurrence** button.
   - The Recurring Appointment dialog displays. The **Patient** and **Duration** fields are prefilled with the appropriate information from the Make Appointment dialog. These fields are "read only."

   ![Recurring Appointments Dialog](image)
2 Use the Pattern radio buttons to select Daily, Weekly, Monthly or Yearly, then enter the appropriate interval for the appointment using the options provided for the selected pattern.

3 Use the Start Recurrence field to specify the date on which you wish the recurring appointments to begin.

4 To schedule a specified number of recurring appointments, select the Create a Total of ___ Appointments radio button, then enter the desired number of appointments in the Create a Total of ___ Appointments text box.

5 To schedule recurring appointments until a specified date, select the Repeat Until End Date radio button, then specify the date on which you wish the recurring appointments to end.

6 When the appropriate information has been entered, click the Create Appointments button to save the recurring appointments to the schedule.

5.4.4 Setting Multiple Appointments

If desired, you can schedule multiple appointments for the same Doctor for the same time period. Add a second appointment in the same manner as adding any other appointment (see Section 5.4.1, Setting an Appointment on page 5-4 for details). When two appointments are scheduled for the same time, they appear “side-by-side” on the Daily Schedule page and the Weekly Schedule page.

If three or more appointments are scheduled with the same Doctor for the same time period, the time period on the Daily and Weekly Schedule pages shows the “Overbooked” color, and the total number of appointments booked for the time period.

If a patient is scheduled for an appointment during a timeslot reserved for a Template, the system will replace the template with the new appointment for that block of time, rather than displaying it as multiple appointments.

5.4.5 Editing Appointments

You can edit an existing appointment to revise previously entered information, mark the appointment as confirmed, and change the appointment status (check the patient in or out).

To edit an appointment:

1 Access the Make Appointment dialog for the desired patient from the Daily Schedule page or Weekly Schedule page, as desired.
   ♦ The Make Appointment dialog is prefilled with the previously entered appointment information.

2 Make changes to Date, Start Time, Provider, billing codes, Duration, Notes or Alerts, as desired, using the procedures described for setting an appointment (see Section 5.4.1, Setting an Appointment on page 5-4 for details).

3 To confirm an appointment, to note that a message was left for the patient or to note that the appointment is being booked a long time in the future, select the Confirmed, Left Message or Year-Out checkbox.
   ♦ The Confirmed and Left Message checkboxes are not available for “None” or “Template” appointments.

4 If desired, you may change the Status of the appointment by selecting the desired radio button:
   ♦ None - This is the default status applied when the appointment was created.
   ♦ Signed In - Select this status when the patient signs in for the appointment.
   ♦ Signed Out - Select this status when the patient signs out from the appointment.
   ♦ Missed - Select this status if the patient missed the appointment.
- **Canceled** - Select this status if the patient calls to cancel and you wish to keep the appointment time on the schedule rather than rescheduling or deleting.

5 When all desired changes have been made, click the **Save Appointment** button to save your changes to the database.

### 5.4.6 Deleting Appointments

If a patient cancels an appointment, you can mark it canceled (see Section 5.4.5 above) or you can delete the appointment from the schedule entirely.

**To delete an appointment:**

1 Access the Make Appointment dialog for the appointment you wish to delete.
2 Click the **Delete** button.
3 Click **Yes** to confirm.
SECTION 6
Managing Inventory

6.1 Overview

The Inventory module manages your inventory of frames, contact lenses and other miscellaneous items. If the system has been preloaded with the Frame UPC CD, managing frames inventory is streamlined by “auto-filling” when a registered barcode is entered.

To display the Inventory window:
Click the Inventory button in the Main Toolbar.

6.2 Viewing Inventory

Each Inventory page provides an overview of the total number of items, by Brand, currently in your inventory for the selected category. From the main Inventory screen for a selected category, you can choose to view the items list for any listed Brand.

To view inventory:

1. Select the category for which you wish to view inventory by clicking the appropriate button: either Frames, Contact Lenses or Miscellaneous.

The main inventory page shows the total number of items, by Brand, currently in your inventory for the selected category. Each line in the listing provides the following information:

- **Quantity** - the total number of items in your inventory for the associated Brand.
- **Brand** - the brand name of the associated items.
- **Purchase** - the total of the individual purchase prices (paid by your practice) for all items of the associated Brand currently in your inventory.
- **List Price** - the total of the individual list prices for all items of the associated Brand currently in your inventory.
• **Sale** - the total of the individual sale prices (charged by your practice when an item is sold) for all items of the associated **Brand** currently in your inventory.

You can re-sort the Inventory list using any column as the sort key. Click a column head to sort the list alphanumerically by the selected column. Click the column head again to sort the list in reverse alphanumeric order.

2. Click a line in the main inventory list to view the items list for the selected **Brand**. The items list contains a listing of individual items for the selected **Brand**.

3. Click the **Back** button to return to the Inventory "main" page.

### 6.3 Adding Items to Inventory

Items are added to Inventory by creating **item records** for each salable/billable item in your practice’s inventory. Once an item record for a given item is created, it **cannot** be deleted. Purchases and sales of the associated items are managed by changing the quantity associated with the item record (see Section 6.4, Managing Inventory on page 6-3 for details).

The general procedures for adding an item to Inventory are the same regardless of the category of the item (Frames, Contact Lenses, Miscellaneous items). The only difference is the specific data fields associated with each item.

**To add a new item to inventory:**

1. Select the category for which you wish to view inventory by clicking the appropriate button: either **Frames**, **Contact Lenses** or **Miscellaneous**.

   • The “main” Inventory page for the selected category displays.

2. Click the **Add Frame**, **Add Contacts to Inventory** or **Add Item to Misc** button, as appropriate.

   • The inventory dialog for the current category displays.

3. Enter the appropriate data for the item being added to Inventory.

4. **For Frames**: Use the **Load Search Boxes with Data From** radio buttons to select the source for the Inventory auto-fill feature: either **Inventory** or **Frames CD**. When **Inventory** is selected and you enter a UPC code for an item for which an “item record” currently exists, the system retrieves the current item record and increases the **Quantity** by
1. When **Frames CD** is selected and a matching UPC code is found, the data fields are “auto-filled” with the appropriate information.

   **For Contact Lenses** and **Miscellaneous Items** this action is performed without the use of radio buttons.

5. When all desired information has been entered, click **Save to Inventory and Close** to add the item to the inventory and return to the main inventory window, or click **Save to Inventory and Add Another** to add the item and refresh the dialog window with blank fields.

### Inventory Data Fields

Not all fields are found in all categories. Unless otherwise specified, all fields are optional.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPC</td>
<td>the unique Universal Price Code for the associated item. <em>This field is mandatory.</em></td>
</tr>
<tr>
<td>Quantity</td>
<td>the quantity of the item currently in your inventory. <em>This field is mandatory.</em></td>
</tr>
<tr>
<td>Manufacturer</td>
<td>the manufacturer (or vendor) of the item.</td>
</tr>
<tr>
<td>Collection</td>
<td>the collection name, number or other designation for frames.</td>
</tr>
<tr>
<td>Name</td>
<td>the name (description) of the item.</td>
</tr>
<tr>
<td>Color</td>
<td>the color (for frames).</td>
</tr>
<tr>
<td>Eye</td>
<td>the eye size</td>
</tr>
<tr>
<td>Material</td>
<td>the material of which the item is made.</td>
</tr>
<tr>
<td>Style</td>
<td>the style name, number or other designation for a frame.</td>
</tr>
<tr>
<td>(Size/Prescription)</td>
<td>size, fitting, or prescription data (Dbl, Tmpls, A, B, ED for frames; Base Curve, Sphere, Diameter for contact lenses).</td>
</tr>
<tr>
<td>Memo</td>
<td>additional notes (often imported from the Spex CD)</td>
</tr>
<tr>
<td>Purchase Price</td>
<td>the single unit purchase price (paid by your practice) for the item.</td>
</tr>
<tr>
<td>List Price</td>
<td>the single unit list price for the item.</td>
</tr>
<tr>
<td>Calculate Sale Price</td>
<td>for frames only, enter an equation in this field, and then click the button to automatically calculate the sale price. Click the ? button next to this field for instructions on equations.</td>
</tr>
<tr>
<td>Sale Price</td>
<td>the single unit sale price (charged by your practice when the frame is sold) for the item.</td>
</tr>
<tr>
<td>Notes</td>
<td>any additional notes related to the item.</td>
</tr>
</tbody>
</table>

When entering pricing information, you may enter amounts in **whole dollars** (i.e. “5”) or **dollars and cents** (i.e. “5.95”). The dollar sign “$” is **optional**.

### 6.4 Managing Inventory

You can edit an item record to update the quantity of an item in inventory as a result of purchase or sale, or to update other data fields in the item record.

#### 6.4.1 Editing an Item Record

**To edit an item record:**

1. Select the category for which you wish to edit an “item record” by clicking the appropriate button; either **Frames**, **Contact Lenses** or **Miscellaneous**.
   - The main inventory page for the selected category displays.


2. Double-click the line in the inventory main page for the **Brand** containing the item record you wish to edit.

3. Double-click the item record you wish to edit.
   - The Inventory dialog displays. The dialog is prefilled with current information for the selected “item record.”

4. Edit the desired information, as described in Section 6.3 above.

You may reflect purchases or sales by increasing or decreasing the total **Quantity**. If this occurs while editing an item record, the **Frame Transaction** window will open after saving (see Section 6.4.2 below). It is recommended, however, that sales be logged from the **Billing** module (see Section 3.3, *Creating an Invoice* on page 3-3 for details), rather than from the from the **Inventory** module. Sales from the **Billing** module will generate an automatic update to inventory, provided the UPC code is entered when the sale is made.

The UPC code cannot be edited.

5. When all desired changes have been made, click the **Save to Inventory and Close** button.

### 6.4.2 Restocking

It is recommended that returns be logged from the **Billing** module (see Section 3.10, *Product Returns* on page 3-12 for details), rather than from the from the **Inventory** module. Returns from the **Billing** module will generate an automatic update to inventory, provided the UPC code was entered when the sale was made. However, returns processed in the **Inventory** module will not update the associated invoices.

Instead of changing the quantity in the item record, you can use the buttons to the left of the inventory window to modify inventory quantity.

1. Click the desired button: **Restock Item**, **Remove Item**, **Return Item**, or **Other**.
   - The transaction window opens.

   All four buttons will take you to the same screen. The only difference between the button is the pre-populated value in the **Type** field.

2. Type in a **UPC** or click the magnifying glass button to browse the inventory.

3. Specify the **Quantity** (the amount by which the stock is changing).

4. Specify the reason for the change in quantity (**Restock**, **Sold**, **Remove Item(s)**, **Return to Manufacturer**, **Correction/Fix Error**, or **Customer Return**), date, and enter any notes if desired.

5. Click **Save** to finish.

### 6.5 Managing Vendors and Optical Labs

The inventory module maintains records containing address and contact information for each vendor and optical laboratory from which your practice purchases products or services. Vendor records are saved separately for frame vendors, optical laboratories, contact lens vendors, and other miscellaneous vendors.

*To access the Vendor Page:*
For Frame Vendors: Click the Other Vendors button from the Frames Inventory page (see Section 6.2, Viewing Inventory on page 6-1 for details).

For Optical Laboratories: Click the Optical Labs button on the Frames Inventory page.

For Contact Lens Vendors: Click the Vendors button on the Contact Lenses Inventory page (see Section 6.2, Viewing Inventory on page 6-1 for details).

For Miscellaneous Vendors: Click the Vendors button on the Miscellaneous Inventory page (see Section 6.2, Viewing Inventory on page 6-1 for details).

By default, the Vendor Page displays information for the first vendor (alphabetically) in the database.

To add a vendor or optical lab:

The Vendor Page contains the same data fields, regardless of the type of vendor or optical lab. Access the appropriate Vendor Page for the type of vendor you wish to add.

1. Click the Add New button.
   - The page refreshes to display “blank” data fields.

2. Enter a name for the vendor (or optical laboratory) in the Vendor text box (or Lab text box for optical laboratories).

3. Enter address information for the vendor in the Address, Address 2, City, State and Zip Code text boxes.

4. If the vendor has a website, enter the appropriate URL in the Web Address text box.

5. Enter any desired notes about the vendor in the Notes text box.

6. Enter the name and telephone numbers for your direct contact at the vendor in the Contact Name, Contact #, Contact 2 # and Contact Fax # text boxes.

7. Enter the vendor’s main telephone numbers in the Company #, Company 2 # and Company Fax text boxes.

8. Enter the vendor’s publish telephone numbers in the Publish #, Publish Fax # and Publish WATS # text boxes.

9. When all desired information has been entered, click the Save button to save the vendor record.

To edit a vendor record:

1. Access the appropriate Vendor Page for the type of vendor you wish to add.

2. Select the name of the vendor whose record you wish to edit from the Vendor menu (or Lab menu for optical laboratories).
   - The Vendor Page refreshes to display the current information for the selected vendor.
3 Edit the desired information, as described for adding a vendor.

4 When all desired information has been edited, click the Save button to save your changes.

To delete a vendor record:

1 Access the appropriate Vendor Page for the type of vendor you wish to add.

2 Select the name of the vendor you wish to delete from the Vendor menu (or Lab menu for optical laboratories).
   - The Vendor Page refreshes to display the current information for the selected vendor.

3 Click the Delete button.

4 Click the Yes button to complete the deletion.

Verifying Inventory:

To monitor shrinkage and ensure you have each item in stock, use the Verify Inventory function on a regular basis to reconcile your actual inventory against the inventory logged in the system.

1 Click the Verify Inventory button in the bottom right corner of the screen.

2 Enter each item individually, either scanning, typing in the UPC, or browsing for it through the Search for UPC button.

3 Click Scan Another Frame between each frame to scan a new one.

4 When finished, click the Compare to Existing.
   - This window shows the number of items in stock compared to the number in the system inventory, as well as the number that system will update the value to, if desired. (You can change the value in Updated Value column manually, if desired.)

5 Select each item you wish to update in the system, or select Check All.

6 Click Update Inventory to change the number in the inventory to the value in the Updated Value column.

6.6 Transaction Reports

The Transaction Report feature allows you to see all the recent transactions made on all inventory items and to search for specific criteria.

To create a Transaction Report:
1. Click the **Transaction Report** button on the top-right of the inventory screen.

   By default, the transaction report will show the previous week of transactions for the product category (**Frames**, **Contact Lenses** or **Miscellaneous**) that was open.

2. Change the search criteria, as desired:
   - **Employee** - The employee associated with the transaction.
   - **Action** - Restock, Sold, Remove Item(s), Return to Manufacturer, Correction/Fix Error, Customer Return, Void Invoice, Unvoid Invoice, Void Transaction, Unvoid Transaction or All.
   - **UPC Type** - Frame, Contact Lens, Miscellaneous, or All.
   - **UPC** - specify an exact UPC number or click the magnifying glass button to browse the inventory.
   - **Change Date** - the date when the inventory change was made
   - **Effective Date** - the date the inventory change was scheduled to take effect.

3. Click **Reload** to run the report.
SECTION 7

Working with Reports

7.1 Overview

The Reports module provides a quick and efficient means of monitoring the current state of your practice. It lets you select from 28 pre-defined reports for any specified date range.

- Billing Code Report - provides an overview of which billing items were sold during the specified report period (see page 7-3 for details).
- Claims Report – shows all outstanding CMS claims (see page 7-4 for details).
- Clinical Quality Measures – shows the data on PQRS quality measures relevant to your optometry practice (see page 7-4 for details).
- Contact Reports - shows a listing of all Contact Lens orders or sales made during the specified report period (see page 7-4 for details).
- Correspondence Report - generates a listing of patients for mailings (newsletters or Statements) (see page 7-5 for details).
- Custom Invoice Report – generates an invoice report with fields customizable by the user (see page 7-8 for details).
- Daily Production and Multi-Day Production Report – provides a recap of production sales for a single day or a selected reporting period (see page 7-8 or 7-14 for details).
- Daily Report or Multi-Day Report - provides a recap of billing activities for a single day or a selected reporting period (see page 7-8 or page 7-14 for details).
- Frames Report - shows a listing of all Frame orders or sales made during a specified report period (see page 7-9 for details).
- Insurance Receivable and Insurance Receivable (as of Date) Report - provides a listing of all outstanding items billed to insurance (see page 7-8 for details).
- Invoice Report - provides a listing of all invoices created during the specified report period (see page 7-10 for details).
- Meaningful Use Measures – shows the necessary reporting data to provide evidence of meaningful use (see page 7-12 for details).
- Medical Records Change Log – shows every change that has been made to medical records during the specified reporting period (see page 7-13 for details).
- Medical Records Report – shows a summary of each new/modified medical records (see page 7-13 for details).
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- **Misc Payment Report** – shows payments made under the "miscellaneous" billing category (see page 7-13 for details).
- **Patients Receivable and Patient Receivable (as of Date) Report** - shows a listing of all patients with a positive balance on their account (see page 7-14 for details).
- **Patients with Credit Report** - shows a listing of all patients with a negative balance on their account (see page 7-15 for details).
- **Recall Report** - generates a list of patients that are due for another appointment (see page 7-15 for details).
- **Referrals Report** - provides an overview of the number of patients referred to your office, by referral type, for the specified report period (see page 7-16 for details).
- **Sales Payment Report** – shows every sales payment made (see page 7-17 for details).
- **Sales Report** - allows for the creation of customized sales reports based on selected Billing Codes (see page 7-17 for details).
- **Schedule Report** - shows a listing of scheduled appointments for a specified report period (see page 7-18 for details).
- **User Log Report** – shows a listing of all activities performed by all computers (see page 7-18 for details).
- **VisionWeb Frames Report** – shows all undispensed VisionWeb frames and the status of each (see page 7-19 for details).

To access the Reports module:

Access to the Reports module is password protected.

1. Click the **Reports** button in the Main Toolbar.
   - The Login dialog displays.

2. Enter your password in the text box provided, then click the **OK** button.

To run a report:

1. Select the desired report from the **Report Type** dropdown menu.
2. Select the report period as specified in Section 7.1.1 below.
3. Click **Generate Report**. The report will open in a new window.

### 7.1.1 Setting the Report Period

Most report screens include a **Time** field that allows you to specify the desired report period. By default, the **end** date is set to the current calendar date, and the **start** date is set one month prior to the current calendar date. You may specify the report period by doing one of the following:

- Changing the **start** and **end** dates to the desired dates.
- Selecting the **start** date and then selecting the time period from the dropdown menu (1, 2, 3, 6 or 12 months).
Selecting one of the quick options from the **Quick Option** dropdown menu. Additional fields specific to a report will be specified in the instructions for that report.

### 7.1.2 Working with Reports

#### Sorting
Most reports are organized into columns. You can sort by a selected column by clicking on the column-header. Click it once to sort in alphanumeric order, and click it a second time to sort in reverse alphanumeric order.

#### Report Details
As a rule, you can double-click on a line in a report to see more detail about that particular line item. From the detail page, click **Back** to return to the previous page.

#### Patient Information
Double-clicking on a line that includes a specific patient’s name will open the **Patient Information** page in the Patient module (see Section 2.5 on page 2-5 for more information).

### 7.2 Explanation of Reports

#### 7.2.1 Billing Code Report

The Billing Code Report provides an overview of the billing items that were sold during the specified report period.

- The **starting and ending dates** for the report period are shown in the upper left-hand corner of the report.
- The **total dollar amount** billed during the report period is shown in the upper right-hand corner of the report.
- By default, the report shows the amount billed by **all doctors**. Use the dropdown menu at the top of the window to show the amount billed by a single doctor.

#### Options for the Daily Report:

**Billing Code Report Detail**

To view a detailed breakdown of billing dates for a selected Billing Code, double-click a line in the listing containing the desired Billing Code. The Billing Code Report Detail screen provides a listing of each time the associated Billing Code was billed during the report period.

Click **Back** to return to the main Billing Code Report.

**Patient Billing Page**

To view the Patient’s Billing page for an item in the Billing Code Report Detail list, double-click the desired line in the listing. The associated Invoice displays in the Crystal PM main window (see Section 3.2, **Viewing and Printing Invoices** on page 3-2 for details).
7.2.2 Claims Report

The Claims Report shows the status of all CMS 1500 claims, identifying whether a claim was submitted or not, and including the Batch ID# so the user can identify if a large number of unpaid claims all came from the same batch.

7.2.3 Clinical Quality Measures

This report provides all information on PQRS Clinical Quality Measures needed for quality measure reporting. After setting the report period and clicking Generate Report, the system will generate a pop-up menu to define additional criteria.

To see data for a single quality measure:

1. Select the Doctor on whom to report, or select All Employees.
2. Select a quality measure from the dropdown menu.
   - The report generator will show the raw data needed and the fields from the Medical Records that pertain to that PQRS measure.
3. Click the Details button to read text of the data needed for that measure.
4. To use a different field(s) from the Medical Record, click the dropdown for that data record listing, and select a new field. Click the Find button to search by ID or Title.
5. Click Run to see the data for that quality measure.
6. Click Submit to export that data to an XML file. (In the future this will be used to automate reporting of Meaningful Use criteria.)

To export data for all quality measures:

Select the Doctor for which you wish to run the report, and click the Run All button. The system will export an XML file of all relevant clinical quality measures.

7.2.4 Contact Report

There are two contact reports:

- The Contact Orders report shows a summary of all contact orders made during the specified reports period, by Status category.

- The Contact Sales report shows a summary of all contact sales made during the specified reports period. This information comes from inventory selections that have the CL/Misc option for including a UPC (see Section 6.3, Adding Items to Inventory on page 6-2 for more information).
Select the desired report from the **Contact Area** radio buttons when generating the report.

### Options for the Contact Orders Report:

**Contact Orders Report Details**
To view a detailed breakdown of contact orders for a selected **Status** category, double-click the desired line in the Contact Orders Report. The screen refreshes to display the selected Contact Orders Detail screen.

**View Prescription**
To view the Prescription page for a Contact Lens order in the Contact Orders Detail list, double-click the desired line in the listing. The associated Prescription displays in an *additional* window (see Section 2.8.5, *Ordering Contact Lenses* on page 2-17 for details).

**Status Change Report**
The Status Change Report shows the current status of every contact order, and the dates on which the order status changed. Select the **Display Status Change Report** checkbox to see the Status Change Report.

### Options for the Contact Sales Report:

**Contact Sales Report Details**
To view a breakdown of contact sales for a selected manufacturer, double-click the desired line in the Contact Sales Report.

Click the **Back** button to return to the Contact Orders Report.

**View Prescription**
To view the Prescription page for a Contact Lens order in the Contact Sales Detail list, double-click the desired line in the listing. The associated Prescription displays in an *additional* window.

### 7.2.5 Correspondence Report

The Correspondence Report is used to create mailing lists for targeted marketing campaigns. If you wish to send postcards to 30-year-old spectacle wearers in a certain zip code, this is the report to run.

**Correspondence Report Criteria:**

There are 29 different criteria for the Correspondence Report. By default, all options are selected to include all patients. In order to narrow down the number of patients by the selected criteria, deselect the checkbox and input the range or preference. The criteria are as follows:

- **Age Range**

  Patients without birthdates specified in their patient records will be omitted from the report unless the **All Ages** checkbox is selected.
Gender

Whether they have a prescription for Contacts or Spectacles.

Zip Code: Note that you may enter a complete or partial Zip Code. For example, entering “787” would include all Zip Codes from 78700 through 78799.

Newsletter preference: Select the Newsletter checkbox if you wish to include all patients in the report regardless of their Mailings preference (see Section 2.6, Additional Information on page 2-6 for details), or deselected the Newsletter checkbox and use the Yes or No radio button to select the desired option.

Statements setting: Select the Send Statements checkbox if you wish to include all patients in the report regardless of their Statements setting (see Section 2.6, Additional Information on page 2-6 for details), or deselect this checkbox and use the Yes or No radio button to select the desired option.

Diagnosis Codes (and associated date range): When entering multiple codes, separate codes using commas.

This Diagnosis Codes checkbox searches the diagnosis codes in the invoices. To search diagnosis codes in medical records, use the field on the next page (after clicking More).

If the Diagnosis Codes checkbox is deselected, you must enter at least one Diagnosis Code in the Codes text box, or an error dialog will display when you generate the report.

Last Full Exam date range

Whether any Future Appointments are scheduled.

Whether they have a Valid Mailing Address.

Insurance Criteria: When the No Insurance Criteria checkbox is deselected, an additional set of options will appear allowing you to select which insurance companies to include or exclude.

Birthdate range

Last Rx date range and type

Whether or not the patient has a Valid e-mail:

Reminder: If the checkbox is selected, the report will include all patients, regardless of whether or not they have a valid e-mail. To return only the patients with a valid e-mail, de-select the checkbox and select the Yes radio button.

Primary Doctor

Specific Billing Codes and date range

Occupation

Employer

Misc / Guardians: Whatever is specified in the first Misc field (see Section 2.5, Patient Information on page 2-5 for more information).

Misc 2: Whatever is specified in the second Misc field (see Section 2.5, Patient Information on page 2-5 for more information).

Last Invoice date range

Creation Date range: The date the patient record was first entered into the system.

Last Appointment Date range
**Note:** In order to access any of the following criteria, click the More button in the upper-right corner.

- **Drug:** Prescription and date range.
- **Medical Record Field:** Select any one of the hundreds of fields from the Medical Record, and enter the desired value to search by that criteria.
- **Lab Results:** pulled from the external data (see Section 8.2.4 on page 8-3 for more information).
- **Allergy:** includes an option to search an Rx for medication allergies.
- **Diagnosis Codes** (and associated date range).

This Diagnosis Codes checkbox searches the diagnosis codes in the **medical records.** To search diagnosis codes in **invoices,** use the field on the previous page (click Back).

- **Recalls** scheduled, by date range.

**Options & Information in the Correspondence Report:**

Note that the total number of patients that meet the criteria is listed in the bottom-right corner.

**Assign Online Document**
Attaches a system file to the patient, so they can access it when they log in to their patient files resource (see Section 2.10.3, Online Documents on page 2-21 for more information).

**Save Data File**
Saves all information to a *.csv file, which can be opened by MS Excel or any other spreadsheet program.

**Merge Patients With Same Address Or Linked Together**
Press this button to merge multiple patients with the same address, so they only get the mailing once. Pressing this button affects this report only and doesn’t change anything in the database.

**Copy Email**
Clicking this button will copy all patients’ e-mail addresses to the clipboard, separated by commas. This can then be pasted into an e-mail program for a group e-mail.

**Sending Patient Reminders**
If this checkbox is selected when you press the Print Address Labels, Print Billing Address Labels, Email with MS Word or Print with MS Word buttons, the system will make a note in the database that you printed a Patient Reminder, allowing you to attest for Meaningful Use.

**Email/Print with MS Word**
To send the Correspondence Report to a Microsoft Word template file for printing/e-mail, click the Email to Word Template or Print to Word Template button; a standard Windows Open dialog displays. Select the desired template file, then click the OK button to open the file.

**Microsoft Word template files are created and maintained through the Administration module (see Section 9.3.14, MS Word on page 9-16 for details).**
7.2.6 Custom Invoice Report

The Custom Invoice Report is used to create a list of invoices, customized to include the fields you want. Once customized, you can return to the same custom report any time you wish.

Customizing the Custom Invoice Report:

When first launched, the Custom Invoice Report shows all available fields, with a width of 60 pixels. To change the report follow the steps below:

1. Select Options > Customize Report from the menu at the top of the window.
   - The report editor will open.
2. Deselect any fields you do not want to include in the report.
3. Change the width of any fields by selecting the field in the right window and changing the number in the Width box or pressing the or buttons.
4. When finished, click Save Customizations.

You can also change the column widths in the report, and then select Options > Save Column Widths to set the current column widths as the default, or Options > Regenerate Categories to revert to the most recent column width defaults.

The Only Patient Amounts on Categories option, when selected, hides insurance amounts to show only patient balances.

7.2.7 Daily Production Report

The Daily Production Report shows a recap of sales, grouped by category. The features and functions of this report are similar to the Sales Report (see Section 7.2.23 on page 7-17 for more details).

The Daily Production Report is generated for a single selected day. For a report showing this same information over a range of days, select the Multi-Day Production option from the Reports dropdown menu.

7.2.8 Daily Report

The Daily Report shows a recap of billing activities for the specified day: Today’s Activities, On Account Receipts and Totals by category. The report period is shown in the Date field at the top of the screen.

The Daily Report is generated for a single selected day. For a report showing this same information over a range of days, select the Multi-Day Report option from the Reports dropdown menu.

Options for the Daily Report:

View by Doctor
By default, the Daily Report is initially generated for all doctors in your practice. To view the Daily Report for
a selected doctor, choose the desired doctor from the Daily Report for menu. The report screen refreshes to display billings for the selected doctor only.

**Daily Report Details**
To view a detailed breakdown of billed items for a selected summary category, click the link in the Totals column of the Daily Report. The screen refreshes to display the selected Report Details screen.

**View Invoice**
To view the Patient's Billing page for an item on any Daily Report Detail screen, double-click the desired line in the listing. The associated Invoice displays in the Crystal PM main window (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

**View Voided Invoices**
To view Invoices that were voided during the report period, click the number shown in the Voided Invoices field at the bottom of the Daily Report screen.

Click the Back to Summary button to return to the Daily Report screen.

**View Open Routing Slips**
To view Routing Slips that were open during the report period, click the number shown in the Current Open Routing Slips field at the bottom of the Daily Report screen. The screen refreshes to display the Routing Slips screen. Each line in the listing provides the following information:

Click the Back to Summary button to return to the Daily Report screen.

To view a currently open Routing Slip, double-click the desired line on the Routings Slips screen. The associated Routing Slip displays in the Crystal PM Main Window (see Section 8.7, Routing Slip on page 8-9 for details).

**View New Patients**
To view a list of new patients that were added to the database during the report period, click the number shown in the New Patients field at the bottom of the Daily Report screen. The screen refreshes to display the New Patients screen.

**View Patient Information**
To view the patient information for a patient on the New Patients screen, double-click the line for the desired patient. The Patient - Quick Info page displays in the Crystal PM main window (see Section 2.4, Quick View on page 2-3 for details).

### 7.2.9 Frames Report

There are three frame reports:

- The **Frame Orders** report shows a summary of all frame orders made during the specified reports period, by Status category.

- The **Frame Sales** report shows a summary of all frame sales made during the specified reports period. This pulls information from any product entered with a Frame UPC.

- The **Frame Orders Expected** report shows a summary of all frame orders, using the expected delivery date as the field searched when generating the date range of the report.

Select the desired report from the Contact Area radio buttons when generating the report.

These reports provide the same features and functionality as the Contact Reports. See Section 7.2.4 on page 7-4 for more details.
7.2.10 Insurance Receivable Report

The start and end dates are not applicable to the Insurance Receivable Report. To run an Insurance Receivable Report from a certain starting date, select Insurance Receivable (as of Date) from the Report Type dropdown menu.

The Insurance Receivable Report provides a listing of all amounts receivable from Insurance providers.

- The total amount due from all Insurance providers is shown in the lower right corner of the screen.

Options for the Insurance Receivable Report:

Most of the following options take the user to a new screen. Click the Back to Summary button to return to the main Insurance Receivable Report.

View by Insurance

By default, the Insurance Receivable Report is initially generated for all Insurance providers with a past due balance. To view the Insurance Receivable Report for a selected Insurance, choose the desired Insurance from the menu at the top of the screen.

View by Time Frame

By default, the Insurance Receivable Report is initially generated for all days past due. To view the Insurance Receivable Report for a selected timeframe only, use the checkboxes at the bottom of the window to select the desired timeframe.

Insurance Receivable Report Details – for Patients

To view a detailed breakdown of billing and payments for a selected patient, double-click a line in the listing to display the Insurance Receivable Report Detail screen for the associated patient. The Insurance Receivable Report Detail screen provides a listing of each billing and payment for the associated patient for the selected timeframe.

View Invoice

To view the Patient’s Billing page for an item in the Insurance Receivable Report Details list, double-click the desired line in the listing. The associated Invoice displays in the Crystal PM main window (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

Sorting Options

You can re-sort the Insurance Receivable Report screen or Insurance Receivable Report Details screen using any column as the sort key. Click a column head to sort the list alphanumerically by the selected column. Click the column head again to sort the list in reverse alphanumeric order.
Mass Insurance Check
If a provider sends a single check with payment to be applied to multiple patients, use the Mass Insurance Check feature to process the payment for all patients at once.

5. From the Insurance Receivable Report, click the Mass Insurance Check button.
   * The Mass Insurance Check window will open.

6. Select the insurance company from the dropdown menu in the upper-left corner.

7. Select the checkbox next to each patient against whom the payment will be applied.

8. In the Ins Payment, Write Off, Transfer to Patient, and Leave Ins columns, enter the amounts to be applied for each patient.
   * The amounts will total at the bottom of the screen.

9. Enter the Check # and Memo in the bottom-right.

10. Click Save Payments.

7.2.11 Invoice Report
The Invoice Report provides a listing of all Invoices created during the specified report period.

* The starting and ending Dates for the report period are shown in the upper-left-hand corner of the report.

The Ins Balance amounts are not accurate until all Insurance checks have been entered in the system.

Definitions (for selected columns):
* Pat Billed - the amount billed to the patient on the associated Invoice.
* Pat Payment - the amount paid-to-date by the patient against the associated Invoice.
* Pat Balance - the balance remaining to be paid by the patient against the associated Invoice.
* Ins Billed - the amount billed to the Insurance on the associated Invoice.
* Ins Payments - the amount paid-to-date by the Insurance against the associated Invoice.
* Ins Write-Off - the amount written off by/for the Insurance against the associated Invoice.
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- **Ins Other** - any other amount paid by/credited for the Insurance against the associated Invoice.
- **Ins Balance** - the balance remaining to be paid by the Insurance against the associated Invoice.

Totals for each column are provided at the bottom of the report. These totals can serve as an aid in identifying billing errors. For example, if an insurance company made changes to filing, it is easy to find due to the large discrepancy between the **Ins Billed** and **Ins Payments** totals.

**Options for the Invoice Report:**

**View by Insurance**
By default, the Invoice Report is initially generated for all insurances accepted by your practice. To view the Invoice Report for a selected insurance, choose the desired Insurance from the dropdown menu at the top of the screen.

**View by Doctor**
By default, the Invoice Report is initially generated for all doctors in your practice. To view the Invoice Report for a selected doctor, choose the desired doctor from the dropdown menu at the top of the screen.

**View Invoice**
To view the Patient's Billing page for an Invoice in the Invoice Report, double-click the desired line in the listing. The associated Invoice displays in the Crystal PM main window (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

**Display CMS Status**
Selecting this option from the Settings menu will add a CMS Status column to the report. This column identifies whether a CMS 5010 form has been filled out for this invoice.

### 7.2.12 Meaningful Use Measures

Crystal PM software compiles all necessary data for optometrists to use when attesting to the meaningful use. The report shows the Core Measures and Menu Items relevant to an optometry practice, and the numerator, denominator, and percent usage for each measure.

- Change the Doctor in the top-left corner and click **Calculate** to run the report.
  - Passing measures are listed in **green** and failing measures are listed in **red**.
- Double-click on a line-item for details on the measure, including definition of the numerator and denominator, and the percentage needed in order to meet the requirement for meaningful use.
- Select a line item and click **Show Patients** to see all patients comprising the numerator and denominator for that measure. Passing patients are listed in **green** and failing patients are listed in **red**.
7.2.13 Medical Records Change Log

This report shows a log of all changes to medical records that have occurred during the reporting period.

- The top-left window lists every instance the medical record was saved.
- The main window shows each individual modification. Current values are listed in black type, archived values (not currently valid) are listed in blue type, and values that were deleted from the medical record are listed in red type.

Medical Records Change Log Options

Specify a Selected Field

By default, the Medical Records Change Log displays all changes to all medical records. To look only at changes to a specific field, click the Selected Field dropdown menu and specify the field.

Restore All Deleted Values

If two people happen to be modifying the same page in the Crystal PM system simultaneously, the system will keep only the information entered by the last person to leave the page, effectively deleting the information the other person entered. This button will search fields on that page that are currently empty to see if the other user input data into that field, and if so, will insert that value into the field.

Drug/Diagnosis Status Log

To see a log of all drug prescriptions and diagnoses, click the Drug/Diag Status Log button.

7.2.14 Medical Records Report

This report shows the date, patient name, and doctor associated with every medical record, as well as any prescriptions given and exams performed.

- The number of records in the reported is listed in the upper-right corner.
- The date range of the report is listed in the upper-left corner.
- Change the Doctor using the menu at the top of the screen.
- Double-click on any medical record to open it in a new window.

7.2.15 Misc Payment Report

The Misc Payment Report shows a recap of all payments made that fall under a miscellaneous category. The features and functions of this report are the same as the Sales Payment Report (see Section 7.2.22 on page 7-17).
7.2.16 Multi-Day Production Report

The Multi-Day Production Report provides the same information and options as the Daily Production Report (see Section 7.2.7 on page 7-8 for details), except that the report is generated for a range of days rather than a single day.

7.2.17 Multi-Day Report

The Multi-Day Report provides the same information and options as the Daily Report (see Section 7.2.8 on page 7-8 for details), except that the report is generated for a range of days rather than a single day.

7.2.18 Patients Receivable Report

The start and end dates are not applicable to the Patients Receivable Report. To run a Patients Receivable Report from a certain starting date, select Patients Receivable (as of Date) from the Report Type dropdown menu.

The Patients Receivable Report shows a listing of all patients with a balance due on their account.

- The total amount owed appears in the bottom right of the screen.

Options for the Patients Receivable Report:

Filter by Provider
By default, the Patients Receivable Report is generated for all patients. To view only those patients seen by a certain provider, select the desired provider in the dropdown menu at the bottom of the screen.

View by Time Frame
By default, the Patients Receivable Report is generated for all past due accounts, regardless of the number of days past due. To view the Patients Receivable Report for patients past due by a specified number of days, use the checkboxes at the bottom of the screen.

Patients Receivable Report Details
To view a detailed listing of billings and payments for a selected account, double-click a line in the listing to display the Patients Receivable Report Details screen for the selected account. This provides a listing of each item billed by your practice, and each payment made by the patient or the patient’s insurer.

- The Patient Amt and Ins. Amt columns lists the total amount billed to the patient/insurance (for Invoiced items) or the amount paid by the patient/insurance against the account (for payments).
- The Patient Total and Ins. Total list the running total of the amounts billed to/paid by the patient/insurance.

Click the Back to Summary button to return to the Patients Receivable Report.

View Invoices
To view the Billing page for a patient with a past due account, double-click any line in the Patients Receivable Report Detail list. The Billing page for the patient displays in the Crystal PM main window (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).
Generate Past Due Receipts
To print Past Due Receipts for all patients with payments due, click the **Print Past Due** button (see Section 7.3, Printing Reports on page 7-19 for details). This will generate a single past due receipt for each patient in the list.

If the Patients Receivable Report contains any patients that have been listed as "not to send statements", the Statements Not Sent dialog displays when the report is run. Click the **Close** button on the dialog to close the dialog. Past due receipts will not be generated for listed patients.

Apply Finance Charges
Use this option to add a finance charge to any patients with past due balances. After running the basic report:

1. Click **Apply Finance Charges**.
   - A confirmation dialogue will pop up.

2. Click **Yes**.
   - The system will re-run the Patients Receivable Report showing only those patients with **Apply Finance Charges** under Additional Info in their patient profile set to **Yes** (see Section 2.6.3 on page 2-7 for more information).

3. Change the % of Past Due amount in the bottom left corner.

4. Under **Days Past**, deselect **All** and select only those past due periods to which you wish to apply the finance charges.

5. Click **Apply Finance Charges** again.
   - A pop-up will tell you how many charges were assessed. When you click **OK**, the Patients Receivable Report will close and must be re-run to see the updated amounts due.

7.2.19 Patients with Credit Report

The start and end dates are not applicable to the Patients with Credit Report.

The Patients with Credit Report shows a listing of all patients with a negative balance on their account (i.e., they have overpaid their balance). This report provides the same features and functionality as the Patients Receivable Report (see Section 7.2.18 above for details).

7.2.20 Recall Report

The Recall Report generates a list of patients that are due for another appointment. Select from one of the three Recall Type radio buttons to specify the type of recall (i.e., which patients should be included in the report):

- **Full Recall Report**: This report uses the Recalls - Date from the Patients - Additional Info page (see Section 2.6, Additional Information on page 2-6 for details) to determine whether a patient's recall date falls within the specified report period.

- **Confirmation Report**: This report uses the Schedule (see Section 5, Managing Schedules for details) to determine if a patient has an appointment scheduled during the specified report period.
Contact Old Patients Report: This report uses Billing information to determine if the patient’s last Full Exam occurred during the specified report period. This report is generally used by practices that do not use the Recall functionality of the Crystal PM system, but still wish to contact patients periodically (quarterly, annually, etc.).

Full Recall Reports and Confirmation Reports will often be run for dates that occur in the future.

Recall Report Options

Send to Word Template
To send a Recall Report to a Microsoft Word template file, click the Send to Word Template button; a standard Windows Open dialog displays. Select the desired template file, then click the OK button to open the file.

Microsoft Word template files are created and maintained through the Administration module (see Section 9.3.14, MS Word on page 9-16 for details).

Generate Recall Messages
Printing the Full Recall Report (see Section 7.3, Printing Reports on page 7-19 for details) will generate a recall message for each patient in the list. When printing has completed, the Add Correspondence Note dialog displays allowing you to add a comment to the patient’s files. Enter the desired comment in the text box provided, then click the OK button.

Apply List towards Meaningful Use Patient Reminder criteria
This checkbox is selected and you print the report, the database will make a note that a patient reminder was sent at this time.

Add Correspondence Comment
In the Confirmation Report and Contact Old Patients Report, you can add a comment to the patient’s files. Click the Add Correspondence Comment button; the Add Correspondence Note dialog displays. Enter the desired comment in the text box provided, then click the OK button.

7.2.21 Referrals Report

The Referrals Report provides an overview of the number of patients referred to your office, by referral type, for the specified report period. Each line in the listing provides the Referral Name (The name of the person who referred the new patient to your practice), Referral Type (Patient, Professional or Other) and Quantity of referrals provided by that person during the report period.

Referral Name options for Referral Type - Other are determined by your System Administrator (see Section 9, System Administration for more information).

Referral Report Details
To display a detailed list of patients referred by a given Referral Name during the report period, double-click a line in the listing to display the Referral Report Detail screen for the associated Referral Name.
7.2.22 Sales Payment Report

The Sales Payment Report shows a recap of all payments made for the CPT codes selected during report setup. The features and functions of this report are similar to the Sales Report (below).

7.2.23 Sales Report

The Sales Report shows a recap of billing activities for the billing codes selected during report setup. The report shows a list of categories to which billing codes are assigned, the Quantity of items for each category, and the billing Totals by category. The report period is shown in the Dates field at the top of the screen.

To generate the Sales Report:

1. Use the Bill Code checkboxes to select the Billing Codes you wish to include in the report.
   - A checkmark indicates the associated Bill Code will be included in the report.
   - An empty checkbox indicates the associated Bill Code will not be included in the report.
   - Use the Select All checkbox to select all Bill Codes.

2. Alternately, you may select a saved sales report from the Saved Sales Report menu. When a Saved Sales Report is selected, the appropriate Bill Codes are selected automatically. Saved sales reports are created and managed in the Administration module (see Section 9.3.17, Reports on page 9-19 for details).

3. When all desired report parameters have been specified, click the Generate Report button.

Options for the Sales Report:

View by Doctor/Employee

By default, the Sales Report is initially generated for all doctors/employees in your practice. To view the Sales Report for a selected doctor/employee, choose the desired doctor/employee from the Sales Report for menu.

Sales Report Details

To view a detailed breakdown of billing codes for a selected summary category, click the link in the Totals column of the Sales Report.

Click the Back to Summary button to return to the Sales Report.

Billing Code Details

To view a detailed breakdown of billings for a selected billing code, double-click the desired billing code on the Sales Report Details screen.

Click the Back to Summary button to return to the Sales Report Details screen.
View Invoice
To view the Patient's Billing page for an item in the Billing Code Details list, double-click the desired line in the listing. The associated Invoice displays in the Crystal PM main window (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details).

7.2.24 Schedule Report

The Schedule Report provides an overview of the number of scheduled appointments, by patient Type, for the specified report period. The report title and date range are shown at the top of the report screen.

Double-click on any appointment Type to display the detailed list of patients for that type. In the Schedule Report Detail list, click the desired appointment to display the appointment information for that appointment (see Section 5.4, Managing Appointments on page 5-4 for more information).

Options for the Schedule Report & Schedule Report Detail:

Flags
Select the checkboxes at the top of the screen, to display only those appointments with the Check Ins Eligibility or Check CPT/Wellness flags selected on the Appointment Detail (see Section 5.4, Managing Appointments on page 5-4 for details). When one of these checkboxes is selected, click the Remove All Flags button to remove those flags from the Appointment Detail.

File Exports
Many of the buttons on this page export the file in a specific format needed for different purposes:

- Export File: a *.txt file with the patient name and appointment day/time.
- Ins Verification: a *.csv file of the Schedule Report Detail with all information needed for Gateway insurance verification.
- WebSystem2: a *.csv file with all information needed for WebSystem 2 insurance verification.
- Send MS Word: sends information to a previously-created MS Word template (see Section 9.3.14 on page 9-16 for more information).

7.2.25 User Log Report

The User Log Report shows all activities performed by all users.

User Log Report Criteria:

There are 6 different criteria for the User Log Report, all of which appear in the final report. By default, all options are selected to include all patients. In order to narrow down the number of patients by the selected criteria, deselect the checkbox and input the range or preference. The criteria are as follows:

- Dates
- Station: The computer used to perform the action.

Running a User Log Report without filtering any of the search criteria will likely result in a very large file, and may take a long time to generate the report.
7. User

7.1 Security Level: This is the security level of the action performed, not of the user. Level 1 is for simple actions (e.g., opening a page), which appear in green. Level 2 is for intermediate actions (e.g., changes to a field) which appear in blue. Level 3 is for high level actions (e.g., updating a file or record) which appear in red.

7.2 Patient impacted by the action.

7.3 The specific action Description.

Wherever applicable, double-clicking on an item in the report will open that item in the main Crystal PM window (e.g., double-clicking a change to a patient record will open the Quick View of the patient record).

7.2.26 VisionWeb Frames Report

This report shows all non-dispensed VisionWeb orders and the current status of each order. Double-click on an item in the list to open the order.

7.3 Printing Reports

Depending on the specific report being viewed, the system provides one or more options for printing report information. You may choose from any of the following options, as available:

- **Print** - Click the Print button to print a hard copy of the currently displayed report.
- **Print to File** - Click the Print to File button to save a copy of the currently displayed report to your workstation as a “tab delimited” file. Report files can be used with most spreadsheet programs, including Lotus and Excel.
- **Print Address Labels** - Click the Print Address Labels button to print address labels for all patients listed in the currently displayed report.
SECTION 8
Medical Records

8.1 Overview

The Records module lets you create and maintain Medical Records for all patients in your practice. Medical Records in Crystal PM are completely customizable, allowing them to be tailored to fit the specific needs or your practice. The examples shown in this section are of “typical” Medical records pages, and may differ from the options available in your system.

To display the Records window:
Click the button in the Main Toolbar.

• The Records window page for the currently selected patient for the current calendar date displays.

• If no patient is currently selected, the Search for Patient dialog displays, allowing you to select the desired patient, or add a new patient to the database (see Section 2.2, Adding & Searching for Patients on page 2-1 for details).

8.2 Entering and Editing Medical Records

Changes to Medical Records are saved automatically when you move to a new tab. To close a page without saving changes, select Configuration > Close Without Saving from the main menu.

The currently selected patient and the current calendar date are shown at the top of the Medical records window. These fields cannot be edited.

8.2.1 Basic Functions

Standard procedure for entering medical records for the current patient:

Press the Diag His or Drug His buttons at any time to see the patient’s diagnoses or drug history (opens in a new window).

1 Select the name of the Doctor preparing the records from the drop-down menu at the top of the window.
2 Select the tab at the top of the window for the desired Medical Records page.

Tabs are provided for each page into which you may enter information. The currently selected tab is highlighted in yellow.

3 Use the mouse or the <Tab> key to move between fields on the currently selected page.

When a field is selected, a grey auto-history box appears below each field showing the previous entered information for the patient. Press <Alt> + <F8> to automatically import the data from the most recent exam. Press <F12> to toggle between showing and not showing the auto-history box.

4 Enter information manually, or press the <F9> key to select from a list of predetermined defaults. Press the <F8> key to automatically select the Default Exam Value (the first value in the F9 default list). Press <Shift> + <F8> or the Shift F8 button or to automatically fill every field on the page with the Default Exam Values.

These defaults are managed by Edit Medical Records mode (see Section 8.10, Customizing Records Pages/Templates on page 8-12 for details).

Press <Ctrl> + T to insert the time.

5 Create or attach a picture (see Section 8.5 on page 8-6), print a letter (see Section 8.6 on page 8-7), create a routing slip (see Section 8.7 on page 8-9), attach an external file (see Section 8.8 on page 8-11) or add a spectacle or contact lens prescription (see Section 8.9 on page 8-11).

6 When finished click the Close button in the upper-right corner.

### 8.2.2 Using the Records for Procedure Function

The dropdown menu at the bottom of the Records window, next to the Old Records button is the Records for Procedure menu. This lets you select a predetermined template that identifies exactly which fields need to be populated for a particular type of patient encounter. This function is often used to ensure the correct data is being captured for quality reporting indicators or to ensure you meet all the requirements for a certain billing code.

For information on creating and editing Records for Procedure templates see Section 8.10.2, Creating and Editing Records for Procedure Templates on page 8-14.

Select the desired Procedure from the dropdown menu.

- Required fields that have yet to be populated, and tabs containing fields that have yet to be populated, appear in pink if the overall requirement has not yet been met or blue if the overall requirement has been met.
- Required fields that have been populated appear in green. Tabs that have been filled out properly have no color.
- Press the <F7> key to open the Records for Procedure information window. This shows all the different Categories of information you are collecting for, the Total number of items in each category (fields to be filled in), how many of those items are Required in order to meet the minimum reporting percentage, and
how many you have Filled in. If you met the minimum required, the line will appear in green, if not it will appear in red.

8.2.3 Importing Data from Other Devices

Crystal PM is set up to import data from over 200 medical devices used by your optometry practice. A full list of supported devices, and instructions for integrating them, is available at Crystalpm.com/machines.htm.

To Configure Your Medical Device

1. Click Import / Export from the main menu, and then select an open slot from the Import Machine options.
   The integration window will open.

2. Click Search online for additional machines.
   The list of Available Machines will repopulate, listing all available machines

3. Select an available machine and press the H key on your keyboard to open the help file.

4. Follow the instructions for configuring that machine.

To Import Data from Your Medical Device

Once the device has been configured, select Import / Export > Import Machine for the desired device. The system will automatically import the data into the correct fields in your template.

8.2.4 External Data

The External Data function is used to create a Continuity of Care Record, order labs, enter lab data and generate messages for government agencies. To access this window, select EHR > External Data from within the Record module.

To generate a Continuity of Care Record

Continuity of Care Records (CCRs) are used to send information on a patient to a third-party physician. From the Pt Info tab in the External Data window, click Save Patient Info as Continuity of Care Record (CCR).

For a medication-related CCR, it is recommended to use the one available on the Allscripts site.

To input lab data

Either enter the information on the Add Diag Tests or Immunization windows, or click the Add Detailed Lab Result button to enter detailed results or import them from a file.

To order a lab for a patient

Select the Orders tab and click the Create Patient Orders button. Select the order from the dropdown menu, or click Change Order and input all the required information to create a new order.

To submit information to government agencies

Select the Notify CDC tab, fill in the information and click Save CDC Message. This saves the information as a file, which you can then send to the CDC.
8.3  E-Prescribing

The **Drug RX's** tab in the Records module is used to manage all drug prescriptions for the patient, including sending the prescription out to the patient’s desired pharmacy (e-Prescribing).

Frame and contact lens prescriptions and orders are managed in the **Prescriptions** tab within the Records module, which is functionally nearly identical to the **Prescription** page within the Patient module (see Section 2.8 on page 2-12 for details).

To prescribe a medication

- E-Prescribing requires integration with Allscripts’ free account. Information on configuring your Allscripts integration can be found in the Administration module (see Section 9.3.7, **E Prescribe on page 9-9**). Default medication lists, formulary lists, and signature directions are managed in the Administration Defaults (see Section 9.3.4 on page 9-5).

1. Select the **Drug RX's** tab within the Records module.

2. To enter a medication, click **Search Online for RxNorm Codes**, or you can enter a pre-determined favorite by clicking **F9** in the **RX** row.

3. Change any additional formulary values as needed.

4. In the **SIG** row, click **F9** and select one of your default signatures or click **Create Custom SIG** to create a custom signature.

   - Click **Save** when finished creating the custom sig in order to add it to the signature.

5. Adjust the **Fill** amount, number of **Refills**, and **Dispense As Written** checkbox, as needed.

6. If you wish to edit a historical prescription, purely for record-keeping purposes, change the status from **Active** to **On Hold**, **Prior History** or **No Longer Active** using the dropdown menu above the **RX** row.

7. When finished, click **Add**.

8. Repeat steps 2–6 above for all necessary prescriptions.

9. When all prescriptions have been added, click **E-Prescribe** in the upper-right corner.

   - The e-Prescribe window opens.
Complete the prescription following the instructions provided by Allscripts.

For more detailed instructions, view the e-Prescribing walkthrough video at www.crystalpm.com.

To edit a prescription

When viewing the Drug RX in an old record, you may wish to edit a prescription. Select the prescription in the Prescribed Medications list, and then make any desired changes, as described above.

8.4 Viewing Prior Records

You can view any prior Medical records available for the currently selected patient.

To view prior medical records:

1. Click the Old Records button at the bottom of the screen.
   - The screen refreshes to display Medical records from the most recent examination for the selected patient.
   - Tabs are added to the bottom of the screen for all Medical records pages available for the examination date.

2. Click a prior records tab to view the associated page. The currently selected tab is highlighted in yellow.

You can return to the new record by selecting one of the tabs at the top of the screen. At any time, click a prior records tab at the bottom to see that old information. The tab you're currently viewing will be highlighted in yellow.

3. To view prior records for a different date, use one of the following methods:
   - Select the desired date from the dropdown menu in the bottom right corner
   - Click the Next or Previous buttons in the bottom right corner.
   - Right-click on one of the shortcut buttons at the bottom of the screen, and select the desired date from the menu displayed.

4. To edit the record, click the Edit button at the top of the screen.

You can only edit a record for 31 days following its creation. After that, you must add an addendum to reflect any changes.

5. To change the Date or the Patient associated with an old record, select EHR > Change Medical Record Date or EHR > Change Medical Record Patient from the main menu. To delete the record, select EHR > Delete Medical Record from the main menu.

6. When finished click the Close button.
To add an addendum to a prior record:

1. Click the Add Addendum button.
   - The Add Addendum to Record dialog displays.

2. Enter the text for the addendum in the text box provided, then click the Add Addendum button to add the addendum to the prior record.

8.5 Working with Pictures

The **Pics** function lets you create drawings to supplement a patient’s medical history. You can create drawings using default templates provided with the system, or you may import photo images using a WebCam or by uploading an existing image.

The **Pics** function may not be available from all Medical Records pages.

To view a picture:

1. Click the Pics button.
   - The Medical Records Picture Viewer displays.
2. Click on the dropdown menu and select the date of the picture you wish to view.

To create a new picture:

1. On the Medical Records Picture Viewer, click the Create New button.
   - A blank template image displays.
2. Click on the upper set of radio buttons to select the image on which you wish to draw. For a diagram, click Both, Internal, External, Cornea or Blank; click WebCam to capture the image using a webcam; click one of the Upload buttons to upload an image from a file; click Dot Matrix for a dot matrix diagram.
3. Click on the lower set of radio buttons to select the desired drawing tool. The drawing tool differs depending on which image you’re drawing on.
   - To draw free form, select the Pen radio button.
   - To draw a “spot”, select the Spot radio button. Click and hold the left mouse button, then drag to draw the spot. Release the mouse button when finished.
   - To draw a straight line, select the Line radio button.
   - To add text to the drawing, select the Alpha radio button. Click the mouse at the location you wish to place the text; a text box displays. Enter the desired text, then click the mouse outside of the text box.
4. To change the display color of the drawing tools, click on the color box next to the desired tool.
5. When completed, enter a name for the drawing in the Title box, then click the Save button. The system will prefix the current calendar date to the drawing Title when saving.

To save the picture to a file on your workstation:
Drawings are saved in .JPG format.

1. On the Medical Records Viewer, select the desired drawing from the drop-down menu.
2. Click the **Save Image to File** button.

**To delete a picture:**
1. On the Medical Records Viewer, select the desired drawing from the drop-down menu.
2. Click the **Delete** button.

### 8.6 Patient Letters

The **Letter** function lets you create customized post-examination letters from letter templates.

*The **Letter** function may not be available from all Medical Records pages.*

**To access patient letters:**

Click the **Letters** button in the top-right corner. The Patient Letters screen displays in an additional window.

#### 8.6.1 Sending a Letter to a Patient

To prepare a letter for a patient, select the appropriate type of letter (letter template), edit the “default” text as desired, and print the letter. Letter templates consist of default text and “variable” values. The system substitutes the appropriate information from a patient’s files for each “variable” value in the template.

**To select and edit a letter:**

1. Click the **Letters** button in the top-right corner.
   
   ♦ The Patient Letters screen opens in a new window.

2. Select the desired type of letter from the **Type Of Letter** menu.

   *The **Type Of Letter** menu lists all letter templates currently available to you. If a template for the desired type of letter does not exist, you can create one using the **Admin Wizard** (see Section 8.6.2, Using the Admin Wizard on page 8-8 for details).*

3. Edit the text of the letter as desired.

   Variables appear in brackets like this: `<first name>`. Be careful not to edit these variables. At any time, click the **Show Values** link to see the values as they will appear in the printed letter, or click **Show Template** to view the variables.
4 To print a copy of the edited letter, click the Print button.

5 To open a copy of the letter in Microsoft Word for additional editing prior to printing, click the Send to Word button. Alternatively, you can click Create to RTF or Save to RTF to open/save it in rich text format.

6 To save a copy of the edited letter to the patient’s file, click the Save Letter button. The letter can then be accessed from the Patient Files page in the Patients module (see Section 2.10, Files on page 2-20 for details).

Be sure to print or save a copy of the edited letter before closing the Patient Letters window. When the window is closed, any changes to the letter will be lost.

8.6.2 Using the Admin Wizard

The Admin Wizard lets you create or edit the letter templates used above.

Access to the Admin Wizard is password protected.

To access the Admin Wizard:

From the Patient Letters page (see Section 8.6.1 above), click the Admin Wizard button. Enter your password in the text box provided, then click the OK button.

By default, the screen shows the template for the most recently accessed patient letter.

To create a new letter template:

1 Click the Create New Letter button.

The screen refreshes to display a blank letter template.

2 Add variables to the template by clicking the Add Field button.

The Value dropdown identifies the field in the Patient or Medical Record that will be inserted when the letter is ultimately printed. The Pattern field displays the text that the user sees when looking at the template variables. (E.g., if you enter “Text” in the Pattern field but select the First Name value, when that variable is inserted into the letter, it will appear as <Text>, and when the letter is printed the patient’s first name will be in that place.)
The Value menu contains a listing of all values that can be imported from the Records module into the patient letter.

To remove a “variable” value from the template, click the associated Remove button.

3. Insert and position the desired textboxes by right-clicking in the lower section of the screen and selecting the desired shortcut menu:

- Header 1, Header 2, Header 3 and Text Box all have predefined font size/styles.
- Rich TextBox allows you to change the font size, style and emphasis for all the text within the textbox.
- Use the CheckBoxes field to insert a list of checkboxes. Note that checkboxes can be selected or deselected by default.

To reposition a text field, hold the <Ctrl> key, then use the up, down, left and right arrow keys to move the field to the desired position.

To resize a text field hold the <Shift> key, then use the up, down, left and right arrow keys to enlarge or reduce the size of the field.

4. Enter the desired default text. To insert a variable into the template, click the Insert button next to that variable.

5. Select or deselect the Do not use previous medical information button, according to your preference.

If this option is deselected, the letter will import the most recent values, even if they come from old medical records. This is commonly used in instances where exams are performed over multiple days. If the option is selected, the letter will leave a blank value if the value in the current record is blank.

6. When all desired text has been added to the template, enter a name for the letter in the Letter Name text box, then click the Save Letter Template button to save the template to the database.

If any of the variable fields are empty in the current patient’s medical record a warning box will alert you to the fact and ask if you are sure you want to use the selected variables.

To edit a letter template:

1. Select the name of the letter template you wish to edit from the drop-down menu in the upper left corner of the screen.

2. Edit the letter template, as desired, as described for creating a new letter above.

3. When all desired changes have been made, click the Save Letter Template button to save your changes to the database.

To delete a letter template:

1. Select the name of the letter template you wish to delete from the drop-down menu in the upper left corner of the screen.

2. Click the Delete Letter button.

3. A confirmation dialog displays the message “Are you sure you want to Delete this Letter?”

4. Click the Yes button on the confirmation dialog to delete the selected letter template.

8.7 Routing Slips

Routing Slips let the Doctor route information related to billing codes, diagnosis codes, etc. to the front desk to expedite invoicing and scheduling.
The R Slip function may not be available from all Medical Records pages.

To display the Routing Slip:

Click the R Slip button in the upper right corner.

To import billing codes from the schedule:

If the currently selected patient has an appointment for the current calendar day, and billing codes were added to that appointment, click the Import Billing Codes from Schedule button to import the billing codes into the Routing Slip.

To import diagnostic codes from the last invoice:

If the most recent invoice has diagnosis codes associated with it, click the Import Diag Code from Last Invoice button to automatically add those codes to the Routing Slip.

To add billing or diagnosis codes to the Routing Slip:

There are three ways to add a billing or diagnosis code to the Routing Slip:

- Add a code from the Most Frequent Used lists (on the left) by double-clicking the desired Bill Code, Diagnosis Code or Description in the list.
- Search for a code by clicking the Search button and scrolling or searching for the desired code. When you find the desired code, highlight it and click Select.
- Browse to a code by clicking the Diagnosis or Billing tabs at the top of the window. From these screens you can expand or collapse the main categories (called Groups) and select the checkboxes next to the appropriate codes. The codes will appear in the Diagnosis Codes and Billing Codes lists on the Summary tab.

These are called Groups because they are primarily used for grouping several diagnoses/billing codes together. For example, a basic exam and spectacles might be grouped together to make it easy to invoice for this common set of billing/diagnosis codes. Groups are managed in the Administration module (see Section 9.3.18, Routing Slip on page 9-21 for details).
To remove billing or diagnostic codes from the Routing Slip:

- To remove a single code, right-click the code and select Delete.
- To remove all billing codes or all diagnostic codes, click Clear All.

To add billing notes and provider information:

Enter any desired billing notes in the Notes to Billing text box.

Select the provider’s name in the Provider dropdown menu, and any other staff member's name in the Staff dropdown menu.

To add a patient recall:

1. Click the Recalls tab.
2. On the right-hand side, select the Type of Recall and the Date, and then click Add Recall.

To save the Routing Slip:

- Click the Close button to save the Routing Slip to the database.
- Click the Close and Schedule Appointment button to save the Routing Slip to the database, and open the Schedule module to schedule an appointment for the currently selected patient (see Section 5, Managing Schedules for details).

8.8 Attaching Files

To attach a file created outside Crystal PM, click the Files button in the top-right corner of the Records window. Detailed instructions on attaching files are available in Section 2.10, Files of the Patient module, on page 2-20.

8.9 Spectacle & Contact Lens Prescriptions

The Spec RX and CL RX functions open a dialog box containing up to four spectacle or three contact lens prescriptions for the current patient. This dialog box contains the same information as the Prescription tab in the medical record, but provides the opportunity to have the prescription window open while viewing other pages in the medical record.

The Spec RX and CL RX functions may not be available from all Medical Records pages.

To use the spectacle or CL prescription dialog:

Click the Spec RX or CL RX button.

- If a prescription has been entered in the Prescription tab in the medical record, the data will automatically be imported.
- If there is no prescription present, enter the information manually (see Section 2.8 on page 2-12 for more information on entering prescription data) or click Import from Last Exam to automatically import the most recent prescription data.
To print the prescription:

3. Click the Print Prescription button to print the currently displayed prescription.

4. Click the Print Default Prescription button to print the patient’s default spectacle prescription.

8.10 Customizing Records Pages/Templates

You can create new Medical Records pages to meet the specific needs of your practice. You can also edit existing Medical records pages to add or delete fields, or rearrange the page layout. This section provides a brief overview of how to customize these pages for your practice. For more advanced training, watch the videos at http://tinyurl.com/7h5v87t.

Access to the Edit Medical Records mode is password protected.

You may edit any Medical Records page except the Prescription and Drug RX pages. In order to create or edit pages, you must be in Edit Medical Records Mode. This mode consists of two windows:

- The main medical records window, in edit mode.
- The Edit Records window, which is used to create and edit the fields to be inserted into the medical records window.

To enter Edit Medical Records mode:

From the EHR menu, select Edit Medical Records. Enter your password in the text box provided, then click the OK button.

8.10.1 Creating & Editing Records Pages

To create a new Medical Records tab:

1. Click the New Tab button.
   - A new Medical Records page tab is added at the top of the screen.

2. Click on the new tab to open it.

3. In the upper-left corner, enter a new name for the tab in the Name of Tab text box.

4. Enter a shortcut name for the page in the Shortcut Name text box at the bottom.

5. If you do not wish the page to import previously entered values from the Medical Records database, select the This tab will not use Auto-History checkbox.

6. If you wish to display the Pics, Letter, R Slip, Files, Spec RX and CL RX buttons on the page, select the Show Shortcut Buttons checkbox.

7. If desired, use the < and > buttons to change the position of the tab.

To create and edit a new medical record field:

1. In the Edit Records dialog, click the Add New Field button.
The Edit Records dialog refreshes to display the **Add New Field** data entry fields.

2. Enter a name for the new field in the **Text** field in the upper right corner.

3. Select the desired field type from the **Type** menu
   - The **Text Only (No Box)** selection is used for field labels.
   - The **Text with 1/2/4 Line Box** is used for open text entry.
   - **Checkbox** is for a single checkbox item
   - **Picture Box** adds an image.
   - **Button** inserts a button that performs a certain action (or multiple actions), when pressed.
   - **Numerical Value** allows only numbers to be inserted, with certain minimums/maximums and decimal points.
   - The remaining options insert unique, specific types of information.

4. Type in a **Description**.

5. If applicable, enter F9 defaults in the **F9 Keys** box, entering each possible selection on its own line.

   The first line in this field will be the **Default Exam Value**. This is the value that will be entered automatically when the user types `<shift> + <F8>` or presses the **Shift F8** button.

6. Edit any other field preferences, relevant to the **Type**.

**To select a page for editing:**

Click the tab for the page to which you wish to edit. The active tab will be highlighted in yellow.

**To rename a medical records page:**

Renaming a Medical record page will invalidate all prior data associated with that page. Exercise care when renaming a page to avoid loss of data.

1. Enter the new name for the page in the **Name of Tab** text box in the upper left corner of the Medical Records page.

2. Enter a new shortcut name for the page in the **Shortcut Name** text box at the bottom of the Medical Records page.

**To add a medical record field to a page:**

1. On the Edit Records dialog, select the field you wish to add to the page from the fields list.

2. Right-click on the medical record page at the location in which you wish to add the field then select **Add Field to Tab**. The selected field is added to the page at the specified location.

**To resize a medical records field:**

1. Click the field you wish to resize.

2. To make the field larger, press the `+` key.

3. To make the field smaller, press the `-` key.
To reposition a single medical record field or label:

1. If necessary, click the Move Item button.
2. Click the field or label you wish to move.
3. Move the field or label using any of the following means:
   - Move it up, down, left, or right using the corresponding arrow key on your keyboard.
   - Drag and drop using the left mouse button.
   - Hold down the <Alt> key and press L to align left, R to align right, M to align middle (horizontally), T to align top, B to align bottom or G to align middle (vertically).

To select multiple fields simultaneously:

To select multiple fields, either use the mouse to draw a selection box, or right-click each field you wish to add to the selection. You can then reposition the group according to the instructions above.

To change the tab order of a field:

When you enter information into a Medical Records page, you can use the tab key to move from one field to the next. When fields are added to a Medical records page, they are assigned a tab order based on the order in which they were added to the page. The first number shown in each field box is its current tab order. The second number is the field ID. You can change the tab order for one or more fields as desired.

1. Click the Re-Order button.
2. Enter the desired tab sequence number in one or more fields.
3. When finished, click the Move Item button to return the page to “move items” mode.

To delete a field:

Select the field and click the <delete> button on your keyboard.

To save your changes:

When all desired changes have been made to the Medical records page, click the Stop Editing and Save Changes to Database button.

8.10.2 Creating and Editing Records for Procedure Templates

To edit the Records for Procedure templates (see Section 8.2, Entering and Editing Medical Records on page 8-1), select EHR > Edit Records for Procedure from the main menu.

To create and edit a Procedure:

1. Select the Procedure you wish to edit from the menu, or to create a new procedure, click the New RFP button.
2. Enter or change the Name, as desired.
3. Use the Add Billing Code, Remove Billing Code, Add Diagnosis Code and Remove Diagnosis Code buttons to add/remove billing/diagnosis codes to the procedure. This will automatically add the selected billing/diagnosis codes to the Routing Slip when generated.
4 Click **Add Category** to create a new category, or **Edit Category** to edit existing categories.

Categories are used to organize the information you need to collect. If, for example, you need to collect information for History of Present Illness, Family History, etc., different categories could be used that don’t necessarily have to line up with the pages in the medical record.

- The Category Editor will open.

5 In the Category Editor, specify the **Category Name**.

6 Select the medical record page containing the field(s) you wish to add to the category, and select the checkbox(es) under **Include within Category** for the corresponding field in order to include it in the category.

7 Once all desired categories have been added, click the **Save Category** button.

- The Category Editor will close, and the updated category will appear in the Categories list.

8 If you only need to report on a certain percentage of fields within the category, click on the number in the **Required** column and change it to the desired number.

At any time, click **Remove Category** to delete the selected category, or **Delete RFP** to delete the entire procedure.

9 When finished creating/editing the Procedure, click the **Save RFP** button.
SECTION 9

System Administration

9.1 Overview

The Administration module lets you configure the Crystal PM system to suit the needs of your office. You can set “default” values for other system modules, configure the system to work with other third-party applications (email, DVI Remo, etc.), maintain the employee roster and schedule, and other “housekeeping” tasks.

To display the Administration window:

Access to the Administration module is password protected.

Click the Admin button in the Main Toolbar.

Master Admin features and functions are shown in the Administration menu only when you have logged in using the Full Admin password.

9.2 Security Levels

The features and functions available to you through the Administration module depend on your “security level.”

There are two ways to manage security in the Crystal PM System:

- **Require User/Password Login**: This option gives each user his/her own password, allowing the master administrator to determine for each user which functions he or she will have access to. It also allows you to log every action performed by each user. This option is usually preferred, especially if the users all have their own computers or if they share a single computer in shifts (such that logging in each time is not likely to impact productivity).

- **Level Access**: This option provides unrestricted access to parts of the system, with a Limited Admin password required to access certain restricted features and a Full Admin password required to access all restricted features. (The master administrator can select which restricted features to make available to general users and limited admins.) This option is generally preferred if users are rotating frequently on a single computer.

To set or edit the security level:
When the software is first installed, by default it has Level Access selected and a blank password for the full admin. To change the security:

1. In the Admin module, click Company in the Admin menu.
2. Click the Security tab.
3. Select the desired security level.
   - If selecting Require User/Password Login, you can set the password and permissions for each user in the Employees section of the Admin module (see Section 9.3.2, Company on page 9-4 for details).
   - If selecting Level Access, follow the steps below for further instructions.

   If you are changing from one security type to another, you will need to restart the Crystal PM program for the change to take effect.

4. Select the Full Admin radio button and enter a password for the master administrator.
   - Passwords can have any combination of alphanumeric characters, but may not include spaces. They will appear as a series of asterisks when entered.
   - Passwords are case-sensitive.
   - Select passwords that you will remember. If you forget the “Master Access” password, you will not be able to access administrative features and functions.
   - Keep passwords secure.

5. Select the Limited Admin radio button and enter a password for limited admin functions.

6. Use the checkboxes to the right and below to select the privileges for the Limited Admin.

7. Select the General User radio button, and select the checkboxes for any privileges that will be granted to all users.

9.3 Admin Features and Functions

9.3.1 Billing

The Billing screen shows a listing of all billing codes in the Crystal PM database. The list is arranged in numeric order, by Bill Code. Each line in the list provides the following information:

- **Bill Code** - the unique identifying number assigned to the billing code.
  - The Bill Code number cannot be changed once the billing code has been created.

- **Proc Code** - the unique procedure code assigned to the medical/diagnostic procedure associated with the billing code. This code is shown on Invoices and CMS Forms.
- **Time** - the *time in minutes* to add to an appointment to perform the procedure associated with the billing code.

- **Description** - the description of the procedure associated with the billing code. This information is shown on Invoices.

- **Category** - the “category of service” description (i.e., “Professional Services”, “Contact Lenses”, etc.) for the procedure associated with the billing code. This information is shown on Daily and Multi-Day reports.

- **Optician** - indicates whether or not an optician can gain credit for the associated billing code; either Yes or No.

- **R Slip** - indicates whether or not the associated billing code is included on Routing Slips; either Yes or No.

- **Full Exam** - indicates whether or not billing against this billing code will update the patient’s recall; either Yes or No. Also shows on the patient’s Last Full Exam.

- **Frame** - indicates whether or not the associated billing code represents a spectacles frame; either Yes or No. When an invoice includes this billing code, scanning of the UPC code is required. The system will search the FRAME UPC CD (if installed) and will remove the item from inventory.

- **Misc** - Indicates whether or not the billing code is associated with a “scannable” item; either Yes or No. If yes, scanning the item will remove the item from inventory.

- **Place Service** - “place of service” code used by the CMS Form.

- **Type Service** - “type of service” code used by the CMS Form.

- **Fee** - the default price for the service.

---

**To create and edit a billing code:**

1. Click the **Create New Bill Code** button.

   - The Edit Billing Code dialog displays.

2. Enter all relevant information in the open fields (see above for a description of each field).

   - Each billing code must have **unique Billing Code** and **Proc Code** numbers.

   - The **Quantity** field is the default quantity to be added any time the billing code is used.
3 If the billing code requires a certain diagnosis in order for it to be valid, enter the relevant diagnostic does in the Requires Diagnostic Codes boxes.

4 When all desired information has been entered, click the OK button to save the new billing code to the Crystal PM database.

To edit an already existing billing code, double-click it from the Billing screen.

**To delete a billing code:**

1 On the Billing screen, double-click the billing code you wish to delete.
   - The Edit Billing Code dialog displays. The dialog is pre-filled with the current information for the selected billing code.

2 Click the Delete Bill Code button.

3 Click Yes to confirm the deletion and update the Crystal PM database.

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**9.3.2 Company**

The Company screen specifies general information related to your office (address, phone numbers, etc.) and sets and maintains security levels. Information on this screen is used by the CMS Form and when printing invoices and prescriptions.

**Setting details**

- Change the **Company Name**, **Address**, and **Phone Numbers** using the fields in the top half of the window.

- Change the company logo using the **Change Logo** button next to the logo.

  It is recommended that the logo you insert is 300 x 114 px. If you insert a logo that is a different size, the system will stretch the image to those dimensions.

- Change the information that appears in the top title bar and the bottom status bar by clicking on the **Fields** button next to **Top Title Info** and **Bottom Status Bar Info**. Select the variables you wish to include.

- General system settings are available under the **General** tab.

  **If Prompt Remove From Inventory (within Billing) is selected, a pop-up will ask if you wish to remove an item from the inventory when it has been included in an invoice. If deselected, it will make the removal automatically.**

- Certain billing and financial settings are available under the **Billing and CMS** tab.

- Security settings are under the **Security** tab (see Section 9.2, **Security Levels** on page 9-1 for more information).

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**9.3.3 Computers**

The Computers screen lets you view the status of all computers currently connected to the Crystal PM database, and to reset computer connections in the event of a “lock-up” condition.
To reset connections:

In the event a “connected” computer becomes "locked up" while viewing a given page, other users may be prevented access to that page or other associated information. In such cases, the computer connections must be “reset” to disconnect the malfunctioning computer from the system.

1. Click the **Reset Connection** button.
   - Connections for all computers currently connected to the Crystal PM database are reset, and the Computer screen refreshes to display an “empty” list.

2. Click the **Computers** link in the Administration menu to refresh the Computers screen and display the list of currently connected computers.

9.3.4 Defaults

The **Defaults** function lets you create and maintain the default lists that appear in drop-down menus (form fields) throughout the Crystal PM system. These lists let you standardize the information entered in these form fields when maintaining patient records, performing billing and invoicing, and other functions.

All Defaults screens are similar in arrangement. The **Page** menu lets you select the desired “defaults” page/category. A series of buttons for each parameter for which you can create a “defaults” list are shown at the top of the page. The current items set for the selected parameter are shown in the text box in the center of the page.

The pages and parameters for which you can set defaults are shown below. Each Defaults Page is preconfigured with a recommended selection of values for each parameter.

To add or edit items:

1. Select the desired defaults page from the **Page** menu.

2. Click the button for the parameter for which you wish to add an item (see page).

3. Click the **Add Item** button to add a new default.

4. To remove a default, select one and click **Remove**.

5. To re-order, select a default and click the **Up** and **Down** buttons.
Items are shown in their associated drop-down menus in the order in which they are listed on the defaults page.

6 To set an item as the main default (the one that will be initially selected when the associated drop-down menu appears), select it and click Set Default.

You cannot set a main default for “auto-entry” lists.

- If an item is the main default, it will be preceded by an asterisk “*” in the default item list.
- To deselect the default item without selecting a new one, click the currently set default item, then click the Set Default button.

The following categories/pages have defaults available:

- **Billing** maintains the Types and other options primarily inside the Make a Payment screen in the Billing module (see Section 3.8, Processing Payments on page 3-10).

- **Contact Orders** maintains defaults inside the Contact Lens Order screen (see Section 2.8.5, Ordering Contact Lenses on page 2-17).

- **Contact Prescription Page** maintains defaults used when printing a contact lens prescription (see Section 2.8.3 on page 2-14).

- **Contact RX** maintains defaults for Contact Lens prescriptions within the Records and Patient modules. To automatically use inventory selections for contact lens ordering dropdowns, select Yes in the Add CL Inventory in F9 category.

- **Drug RX** maintains defaults for the Drug RX tab within the Records module (see Section 8.3, E-Prescribing on page 8-4).

- **Files** maintains defaults for the Files tab within the Patient module (see Section 2.10 on page 2-20).

- **Frames Page** maintains defaults for frame ordering (see Section 2.8.4, Ordering Frames on page 2-15), including the ability to add billing codes to each frame.

- **Frames Page (VSP)** manages the default billing codes associated with the VSP claims (see Section 9.3.23 on page 9-24).

- **CMS** sets default values for fields on the CMS Claim Form (see Section 3.6, Working with CMS Claims on page 3-7), and set the appropriate margins for printing the form on your local printer.

- **Inventory** lets you create a default sales price equation (see Section 6.3, Adding Items to Inventory on page 6-2).

- **Patients Page** maintains defaults for the Patient Info, Additional Info, and Insurance tabs within the Patient module (see Sections 2.5 to 2.7 on pages 2-5 to 2-12).

- **Spectacle RX** maintains defaults used when printing a spectacle prescription (see Section 2.8.3 on page 2-14).

### 9.3.5 Diagnosis Codes

The Crystal PM system is pre-configured with a complete set of diagnostic codes. Since many diagnostic codes do not apply to Optometry or Vision Therapy, you can select which codes will be visible (available) in other system modules. The diagnostic codes most frequently used in your practice should be added to the Routing Slip. Infrequently used codes should be added to the Search codes. Unused codes should be hidden.

The Diagnostic Codes screen shows a listing of all diagnostic codes in the Crystal PM database. The list is initially arranged in numeric order, by **Diag Code**. You can re-sort the Diagnostic Codes List using any column as the sort
key. Click a column head to sort the list alphanumerically by the selected column. Click the column head again to sort the list in reverse alphanumerical order.

Each line in the list provides the following information:

- **Diag Code** - the unique identifying number assigned to the diagnostic code.
- **Description** - the description of the diagnosis associated with the diagnostic code.
- **Search Codes** - indicates whether or not the associated diagnostic code is available in the Search codes function; either Yes or No.
- **R Slip** - indicates whether or not the associated diagnostic code is listed as one of the Most Frequently Used diagnoses when coding Routing Slips and invoices; either Yes or No.

**To create or edit a diagnostic code:**

1. Click the Create Diag Code button.
   - The Edit Diagnostic Code dialog displays.
2. Enter a number for the diagnostic code in the Diag Code text box and description in the Description text box.
   - Each diagnostic code must have a unique Diag Code number.
3. Set the availability of the diagnostic code within the Crystal PM system.
4. To attach a billing code to this diagnosis, so that any time the diagnosis is selected in an inventory the billing code will be added, click the Add Billing Code button.
5. To add an alert each time this diagnostic code is entered, click the Add Alert button. Alerts can:
   - Prompt the user to confirm they want this diagnostic code.
   - Print a letter.
   - Start an e-mail.
6. When all desired information has been entered, click the OK button to save the new diagnostic code to the Crystal PM database.

To edit a diagnostic code double-click it on the Diagnostic Codes screen.
To delete a diagnostic code:

1. On the Diagnostic Codes screen, double-click the diagnostic code you wish to delete.
   - The Edit Diagnostic Code dialog displays. The dialog is pre-filled with the current information for the selected diagnostic code.

2. Click the Delete Diagnostic Code button.

3. Click Yes in the confirmation window to complete the deletion and update the Crystal PM database.

9.3.6 Electronic Claims

The Electronic Claims screen lets you save electronic claims to a batch file for batch processing. Each time you select the Add to Batch button from the CMS Form (see Section 3.6, Working with CMS Claims on page 3-7 for details), the claim is added to the Electronic Claims list on the left side of the Electronic Claims screen. These claims can be selectively added and saved to the batch file. Claims that have been to the batch file are shown in the batch list on the right side of the screen.

To view or edit a claim:

You cannot view or edit a claim that is currently in the batch list. If you wish to view a claim that is currently in the batch list, you must return the claim to the Electronic Claims list first.

Double-click the claim you wish to view or edit in the Electronic Claims list.

- The completed CMS Form displays. Edit the displayed information as desired (see Section 3.6, Working with CMS Claims on page 3-7 for details).

To add claims to the batch file:

- Add a single claim to the batch file by selecting it in the Electronic Claims list and clicking the button.
- Add all claims in the Electronic Claims list to the batch file by clicking the button.

To remove claims from the batch file:

- Remove a single claim from the batch file by selecting it in the Electronic Claims list and clicking the button.
- Remove all claims from the batch file by clicking the button.

Once all desired claims have been added to the batch list, you must save the batch file for email or uploading to the insurance company or EDI. Click the Save Batch to File button to save the file, or Save to Location to save to a single file that is updated each time the Save to Location button is pressed.

The CL Orders have the same functionality except that the Batch CL Order button submits the claim automatically.
9.3.7 E Prescribe

The E Prescribe function is used to register your Crystal PM software with AllScripts to enable e-prescribing. The AllScripts e-prescribing account is free, but must be registered and the password (provided by Crystal PM support) entered. Contact Crystal PM support for more information on activating e-prescribing.

9.3.8 Email

The Email screen lets you configure the Crystal PM system to work with your office email system. Use this function to specify the appropriate email server information, and test the server connection before saving.

- If you are not sure of the correct settings for your company’s email system, check with your Network Administrator.
- Do not save the server setup information until the setup has been tested successfully. If the email test fails, verify the setup information, make any necessary changes, and re-test.

9.3.9 Employees

The Employees section manages all employee information within the Crystal PM database, including contact information, licensing numbers, passwords and permissions.

- Doctors appear in blue, with an asterisk “*” following the Name.

From this screen you can add a new employee, edit information for an existing employee, delete an employee, and print the employee roster.

To add or edit an employee:

1. To add an employee, click the Add New Employee button. To edit an employee’s information, double-click that employee in the list.

2. Enter the employee’s name and contact information.

3. If using the Require User/Password Login security setting (see Section 9.2, Security Levels on page 9-1 for more information), the Password entered below the contact information is the password they will use to login to the system.

4. Select the appropriate checkboxes next to the employee name.

   - When the Is this employee a Doctor? checkbox is selected, the Employee Edit dialog refreshes to display the Doctor Information fields. These fields include licensing numbers, e-prescribing username/password, and electronic signature file. Enter information in these fields as appropriate.

5. The checkboxes to the right are the permissions this employee will have, if using the Require User/Password Login security setting (see Section 9.2, Security Levels on page 9-1 for more information). Click Master Admin to make this employee a master user, or select the desired permissions.

   - Selecting the Billing, Reports or Admin checkboxes under Main Pages will enable additional options to select the user’s specific billing, reports or admin privileges.

6. When all desired information has been entered/edited, click the Create Employee or Update button.
You must click **Update** in order to update the employee information.

**To delete an employee record:**

If an employee is deleted, the information will still be associated with old medical records and schedules. Their information will be removed from old invoices, and you will be unable to select that employee for anything going forward. Contact Crystal PM Technical Support to restore a deleted employee.

1. Double-click the name of the employee you wish to delete in the Employee’s list.
2. Click the **Delete Employee** button.

**To print the employee roster:**

Click the **Print Roster** button to print the current list of employees.

### 9.3.10 Insurance

The **Insurance** screen lets you create and maintain records for insurance companies and policies accepted by your practice, to set fees and fee adjustments for billing codes for the currently selected insurance, and to set CMS Form defaults for the currently selected insurance.

Changes made to insurance information are automatically saved to the database.

#### The Information Page

The Information page provides general information related to a selected insurance.

**To display information for an insurance company:**

1. Click the **Information** button on the Insurance screen.
2. Select the insurance for which you wish to view information from the **Insurance** menu above the Information button.

**To add insurance information:**

1. Click the **Add New Insurance** button.
2. Enter the full and abbreviated names for the new insurance in the **Insurance Name** and **Abbrev** text boxes.
3. Enter all known information in the appropriate text boxes, including the name and email address of your office’s contact at the insurance company in the **Contact Person** and **Email** text boxes.
4. If desired, enter any additional notes in the **Notes** text box.

**To edit insurance information:**

1. Select the insurance for which you wish to edit information from the **Insurance** menu.
2 Make the desired changes to the current information as described for adding new insurance.

**To delete insurance:**

The **Delete Insurance** button is available only when logged in with “Master Access” permissions.

1 Select the insurance you wish to delete from the **Insurance** menu.
2 The Information screen refreshes to display the current information for the selected insurance.
3 Click the **Delete Insurance** button.
4 A confirmation dialog displays. Click the **OK** button to complete the deletion.

**To merge insurance companies:**

This action combines two companies, and changes all records associated with the **acquired** insurance company to be associated with the **acquiring** insurance company.

1 Select the insurance *that is being acquired* – i.e., the insurance company whose information we are changing from.
2 Click **Merge Insurance**.
3 In the dropdown menu, select the **acquiring** insurance company – i.e., the one that the information is being merged to.
4 Click **Merge to Insurance and Remove**.
   - If you have a large number of records, this action may take a long time.

**The Billing Codes Page**

The Billing Codes page lets you make adjustments to your office’s standard billing amounts based on the specific coverage offered by the selected insurance.

**To display the Billing Codes page:**

1 Click the **Billing Codes** button on the Insurance screen.
2 Select the insurance for which you wish to make billing code adjustments from the **Insurance** menu.

The Billing Codes page displays a list of all billing codes defined for your practice. Each line in the list shows billing code (**Bill Code**), procedure code (**Proc Code**), **Description** and **Default Price** for each billing code.

**To make Billing Code adjustments:**
Adjustments to billing codes made within the Administration module are displayed by default in the Billing module when creating or editing an Invoice (see Section 3.2, Viewing and Printing Invoices on page 3-2 for details). Prices can also be changed within the Billing module on a patient-by-patient basis.

1. In the billing codes list, double-click the billing code for which you wish to make adjustments.
   - The Billing Code Adjustments dialog displays.

2. Enter adjustments to the billing code fees, as appropriate:
   - **Ins Estimated** - The amount you expect to receive from the insurance, including the patient’s copay amount. For example, accepting a certain insurance plan requires you to charge $60.00 for a Comprehensive Exam, but for other patients, the charge is $90.00.
   - **Ins Discount** - The discount the patient receives for belonging to the associated insurance plan (standard fee minus **Ins Estimated** amount).
     - The **Ins Discount** field is “auto-filled” by the system when the **Ins Estimated** amount is entered.
   - **Pat Responsibility** - The amount the patient owes in addition to the copay amount, but not including the overage amount.
     - The **Ins Discount** field is “auto-adjusted” (decreased) by the amount entered in the **Pat Responsibility** field.
   - **Overage** - Any amount the patient owes above the insurance covered amount. This value is typically used with glasses upgrades, which amounts are over insurance maximum. For example, an insurance plan covers $200.00 (with a patient’s $50.00 copay) on a pair of glasses, but the frames the patient wants cost $275.00. In this case, the **Ins Estimated** is $200.00, the **Ins Discount** is $0.00, the **Pat Responsibility** is $0.00, and the **Overage** is $75.00.
     - The **Pat Responsibility** field is “auto-adjusted” (decreased) by the amount entered in the **Overage** field. If the value in the **Pat Responsibility** field is $0.00, the **Ins Discount** field is “auto adjusted” (decreased) by the amount entered in the **Overage** field.
   - **Overage Disc** - The discount offered on the **Overage** (amount not covered by insurance. The **Overage Disc** is used to encourage patients to purchase higher quality frames. Click the % button, then selected the desired discount percentage from the shortcut menu displayed. The appropriate dollar value is entered in the **Average Disc** field automatically.

3. When all desired adjustments to the billing code have been made, click the OK button to save the changes to the database.

The CMS Form Page

The CMS Form Page lets you specify the default values to be entered automatically in the CMS Form whenever used for the associated insurance.

If fields on the CMS Form Page are left blank, the appropriate information for these fields will be taken from the Insurance - Information Page and from the Company page (see Section 9.3.2, Company on page 9-4 for details) when the CMS Form is used for the associated insurance.

**To display the CMS Form page:**

1. Click the CMS Form button on the Insurance screen.
2. Select the insurance for which you wish to set default values from the Insurance menu.

3. The Insurance screen refreshes to display CMS Form page for the selected insurance.

To set the CMS Form defaults:

1. Enter the name and address of the insurance in the Insurance Info (top of CMS form) text box.

2. Select the appropriate Type of Claim (Box 1) radio button for claims associated with this insurance.

3. Enter any desired text associated with the cause(s) of patient’s condition in the Reserved for Local Use (Box 10d) text box.

4. Enter the name of the insurance in the Insurance Plan Name or Program Name (Box 11c) text box.

5. Enter any desired text related to EPSTD and NPI in Box 24 options.

6. If you wish this field to contain a patient’s Medicare #, Medicaid # or Blue Cross #, leave the field blank, and select the appropriate checkbox. The specified information will be taken from the patient’s records.

7. If your practice works with hospitals or other facilities (or does not) and you wish to note on the form that you do or do not accept assignments from other facilities, select the appropriate response under Accept Assignment? (Box 27).

8. To display the doctor’s name instead of the words “Signature on File” in the signature field, select the checkbox in Box 31.

9. Enter the name, address and phone number for the physician who provided the service in the Physician’s, Supplier’s Billing Name, Address, Zip Code & Phone (Box 33) text box.

10. Enter the appropriate PIN # and Group # in the PIN # (Box 33) and Group # (Box 33) text boxes.

9.3.11 Integrations

The Integrations admin screen manages the system’s integration with external platforms for ordering contact lenses, 3rd party recalls/scheduling, billing/coding, insurance verification and lab ordering. All of these require third party set-up, and this screen is used to alert the system to whether or not your practice integrates with these vendors. Contact the companies directly for setup instructions.

VisionWeb and VSP integrations are managed in their own admin screen. See Sections 9.3.22 on page 9-23 and 9.3.23 on page 9-24, respectively.
<table>
<thead>
<tr>
<th>Function</th>
<th>Vendor(s)</th>
<th>Website</th>
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</thead>
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<tr>
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<td>Lab Ordering</td>
<td>DVI Remo</td>
<td><a href="http://www.dvirx.com">www.dvirx.com</a></td>
</tr>
</tbody>
</table>

**Additional Instructions for DVI Remo Installation:**

DVI Remo sends frame orders directly to the DVI Remo Program.

You *must* have the DVI Remo Program installed on the client computer prior to configuring this option.

1. Click the **browse** button to locate the DVI Remo executable “Wremo.exe” on your computer.
   - The *default* location for the DVI Remo executable is located in the directory C:\dviremo\Wremo.exe.
2. Click the **browse** button to locate the XML file “dviremo.xml” on your computer.
   - The *default* location for the DVI Remo executable is located in the directory C:\dviremo.xml.
3. Select the **DVI Lab** to which to send the information.
   - The list of laboratories in the **DVI Lab** menu is maintained in the Inventory module (see Section 6.5, *Managing Vendors and Optical Labs* on page 6-4 for details).
4. Enter the **Account Web#** and **Lab Web#** in the respective text boxes.
   - The laboratory should supply you with this information.
5. Click **Link Defaults to DVI** to have all lens criteria directly linked between Crystal and DVI Remo.
6. Click the **Save** button to save your changes to the DVI Remo setup.

**9.3.12 Inventory**

The Inventory admin screen manages the inventory transaction settings.

- **Track Individual Inventory Items**: Deselect this option to turn off inventory tracking on a sale-by-sale basis.
- **Item Selection Method**: Use either the default or manual method of inputting inventory items.
- **Use RFIDs** will be available in a future release of the software.

The **Inventory Items** is a read-only list of all products currently part of the inventory.
9.3.13 Invoices

The Invoices admin screen sets the look and feel of the invoices.

- The top portion of the screen lists standard information to include in the upper portion of the invoice, as well as checkboxes for additional data to include.
- The selection under View/Print Invoice Options identifies the default view when printing invoices.
- The Diagnosis Offset moves the diagnosis code down the page. This is primarily used if the size/placement of the address window on the envelope would otherwise expose confidential information.
- Use the Custom Invoice Tool to create a custom invoice (see below for detailed instructions).
- Change the default header and footer text and fonts.

**Using the Custom Invoice Tool:**

There are four custom invoices available: Invoice, Invoice w/o Ins, Statement and Statement w/o Ins. Select the invoice(s) you’d like to customize using the buttons at the bottom of the Custom Invoice Template window.

- You must click Save Template in the bottom right of the Custom Invoice Template in order to save your changes. Closing the window in any other way will cancel your changes. If you are making a large number of changes to your invoice, save frequently to avoid losing your work.
- Load a pre-existing template, or save the template to file, using the File menu.
- Clear the entire invoice by select Edit > Clear All from the menu.
- Most items can be moved by dragging and dropping and deleted by right-clicking and selecting Delete.
- Use the Text Options box to add/edit text, using the options below to change the font type, size, color, and alignment.
- List variables in <brackets>.

For a list of variables, see Section 9.3.14, MS Word on page 9-16 below. Note that the variables in MS Word are identified by double-brackets, but in the Custom Invoice Tool are identified by single brackets.

- Double-click on a text field or variable to open that field in the text editor.
Use the **Image Options** to add or resize an image.

Use the **Mouse-Click Drag Options** to insert a rectangle or a line. Use the **Select** option to select multiple items at once.

To delete a rectangle or line, use the **List of Lines and Rectangles** under the **Fields** tab below the **Image Options**. This lists the starting and ending coordinates of each rectangle and line. Double-click the desired item to delete.

Manage the overall look/feel of the Transaction Data Table, including font style and size, under **Transaction Data** at the bottom of the Custom Invoice Template. To rename a column in the Transaction Data Table, click on the column header. To re-order columns, in the Transaction Data Table drag and drop the column header.

To use different columns in the Transaction Data Table, click **Edit Columns** under the **Tabs** below **Image Options**. The width of the column (in pixels) is listed next to each column name. Double-click the column and change the number in the bottom-right corner of the window to change the width of the column. When finished, click **Update Columns**.

To show/hide the company logo, Diagnosis table, and previous balance, use the checkboxes in the bottom-right.

To copy a template from one custom invoice template to another, use the **Copy Template** button.

Remember to **Save Template** when finished.

### 9.3.14 MS Word

The MS Word function is available for use with Microsoft Word 2002 and above.

The MS Word screen is used to generate template files in Microsoft Word. These template shows the variables available when using the Word Mail Merge function, which can be used with the Correspondence Reports (see Section 7.2.5, **Correspondence Report** on page 7-5 for details) or for sending mail directly to a patient (see Section 2.10, **Files** on page 2-20 for details).

**To generate a template file:**

Click the **Generate Template File** (contains patient variables), **Generate Schedule Template File** (contains patient and scheduling variables) or **Generate Records Template File** (contains patient and medical record variables) button. The Crystal PM system launches Microsoft Word (if it is not already open), opens a new document, and generates the template file.

The file that has been generated lists every variable used by the system when performing a mail merge. Most practices will use this information to generate custom correspondence letters with only the variables needed.

### 9.3.15 Patients

The Patients screen shows a listing of all patients entered in the Crystal PM database.

Inactive patients are shown in red.

You can re-sort the Patient’s List using **any column** as the sort key. Click a column head to sort the list alphabetically by the selected column. Click the column head again to sort the list in reverse alphanumeric order.

**To set patient status:**

1. Click the **Name** of the patient whose status you wish to change.
2. Click the **Toggle Active** button.

**Additional options:**

- **The Find Patient’s Options** setting is designed to expedite the patient search function according to your needs. If you have a large number of patients in your database, selecting the **50,000+** option sets the search function to begin generating results only after the third letter has been entered. This prevents the system from bogging down when searching through your database.

- **Print Name Options** – print the patient’s nickname or formal first name.

- **Print Folder Options** – specify the variables to appear on folder labels.

- **Recalculate Options** – Older versions of Crystal PM used different ways of calculating the Last Exam, Last Paid, Last Frame Order and Last CL Order. As a result, newer versions of the software may return a blank value for those fields. The **Recalculate** buttons recalculate those values, ensuring the most recent exams, payments, and orders show up on the corresponding reports.

  The easiest way to test if this action needs to be performed is to search for a patient (see Section 2.2, Adding & Searching for Patients on page 2-1 for details). The rightmost column in the Search for Patient dialog is **Last Exam**. If this field is blank for many patients, the values should be recalculated.

  Perform this action overnight, as it can take a long time to complete.

**9.3.16 Recall**

The Recall screen lets you create and manage recall types, and create and maintain recall templates (recall notification messages). The information maintained by the Recall screen is used by the Recall Report function (see Section 7.2.20, Recall Report on page 7-15 for details).

**Working with Recall Types**

You can create and maintain multiple recall types to support the specific needs of your practice.
To add a new recall type:

1. Click the Recall Types button to display the Recall Types screen.
2. Click the New Recall Type button.
   - The Recall Types screen refreshes to display “blank” fields.
3. Enter a name for the new recall type in the Recall Types - Type Name text box.
4. Enter the Default Recall Date (elapsed period from Full Exam in days, weeks, months or years) in the days, weeks, months or years text box, as appropriate, or use the scroll buttons to scroll to the desired date.
5. Click the Add Another Contact to Recall button to schedule a message to the patient for the current recall type.
   - The Recall screen refreshes to display the Add Contact field.
   - You can associate multiple contacts (recall messages) with any recall type. Recall messages can be sent both before and after the recall date.
   - Use the days / weeks / months radio buttons and text box and the Before or After Recall Date menu to specify the time Before or After the recall date (as appropriate) at which you wish to send a recall message to the patient.
   - Select the recall message template to use for this recall contact from the Recall Template menu. The Recall Template menu contains a list of all recall template currently defined in the Crystal PM database (see Working with Recall Templates on page 9-18 for details).
   - Click the Add New Contact button.
6. Repeat step 5 to add additional contacts for the current recall type.
7. To remove a recall message from the recall contacts list, select the desired contact in the list (the selected contact will be highlighted), then click the Delete button below the contacts list.
8. When all desired information has been entered, click the Save button to save the new recall type to the Crystal PM database.

To edit a recall type:

1. Click the Recall Types button to display the Recall Types screen.
2. Select the recall type you wish to edit from the Recall Types menu.
3. Edit the desired information, as described for adding a recall type.
4. When all desired changes have been made, click the Save button to save your changes to the database.

To delete a recall type:

1. Click the Recall Types button to display the Recall Types screen.
2. Select the recall type you wish to delete from the Recall Types menu.
3. Click the Delete button below the Recall Types menu.
4. Click the Yes button to confirm the deletion.

Working with Recall Templates

The Recall Templates function lets you create “message templates” that are used when sending messages to patients for each recall contact specified for a given recall type.
To add or edit a new recall template:

1. Click the Recall Templates button to display the Recall Templates screen.
2. Select the template you wish to edit or, to create a new template, click the New Recall Template button.
3. Enter/change the name for the template in the Template Name text box.
4. Select the radio button for the desired type of recall message, either Phone, Email, Postcard, Letter or Address Label.
5. Enter the text for your message in the message template text box.
6. Click the List of Possible Variable link to display the list of “variable data elements” that can be inserted in the message. To insert a variable in the template, position the cursor in the message template text box at the correct position and double-click the desired variable.
7. To view your template with “placeholder” values for selected “variables”, click the Show Values link.
   - The message template text box refreshes to show “placeholder” values for all “variables” in the template.
   - When the Show Values option is selected, the message template text box is “read only.” Click the Show Variables link to return the message template text box to “edit” mode.
8. To see how the template will appear when printed, click the Show Print Preview link.
9. When all desired information has been entered, click the Create Template button to save the new template to the Crystal PM database.

To delete a recall template:

1. Click the Recall Templates button to display the Recall Types screen.
2. Select the recall template you wish to delete from the Recall Templates menu.
   - The Recall screen refreshes to display the selected recall template.
3. Click the Remove button.
4. Click the Yes button to confirm the deletion.

9.3.17 Reports

The Reports function lets you create customized Sales Reports based on a series of billing codes. Customized Sales Reports are run from within the Reports module (see Section 7.2.23, Sales Report on page 7-17 for details).

To add a new report:

1. Click the New Report button.
The Reports screen changes from “read only” mode to “edit” mode, and displays a blank report parameters list and default Report Name.

2 Enter a new name for the report in the Report Name text box.

3 Use the Billing Code and Billing Text list boxes to select the parameters you wish to include in the report:

4 Click the button to add the currently selected billing code to the report parameters list.

5 The Reports screen refreshes to display your changes.

6 Repeat steps 3 and 4 to add additional billing codes to the report parameters list.

Be careful not to include the same billing code more than once in any given report.

7 If you wish to remove a billing code from the report parameters list, click the desired code in the list, then click the Remove Bill Code button.

8 When all desired billing codes have been added to the report parameters list, click the Save Report button to save the report to the Crystal PM database.

9 The Reports screen returns to “read only” mode.

To edit report contents:

1 Select the report you wish to edit from the Sales Report Name menu.

2 Click the Edit Report button.

   The Reports screen changes from “read only” mode to “edit” mode.

3 Add new billing codes to the report parameters list, or remove existing codes from the list, as described for adding a new report.

4 When all desired changes have been made, click the Update Report button.

To delete a report:

1 Select the report you wish to delete from the Sales Report Name menu.

2 Click the Delete Report button.
9.3.18 Routing Slip

The Routing Slip admin function manages the groups used in Routing Slips (see Section 8.7, Routing Slips on page 8-9 for more information). At any time, you can see what the Routing Slip looks like by clicking Preview Routing Slip.

To add or edit a Group:

The most common usage of Groups is for a set of billing/diagnosis codes that are commonly invoiced together. For example, a basic exam and spectacles might be grouped together to make it easy to invoice for this common appointment type.

1. Select Billing Codes or Diagnosis Codes at the top of the window.
2. Click the Add Group button at the bottom of the window to create a new group.
3. Type a name in the naming field.
4. Drag the desired billing/diagnosis codes from the top field (or any other field) into the desired group.

At any time you can click Clear Group to remove all billing/disagnosis codes from the group, Remove Group to delete it, or you can right-click an individual billing/diagnosis code and select Delete to remove a single code from the group.

5. When finished, click Save.

You can also save to and import from a *.csv file. This can be especially useful for reordering groups.

9.3.19 Schedule

The Schedule screen is used to set the scheduled working hours for all employees for whom the Schedule Appointments for this Employee option is selected (see Section 9.3.9, Employees on page 9-9 for details). This screen also sets certain functional and visual defaults for the Scheduling module in the Crystal PM system.

Working with Employee Schedules

To view or edit the ongoing schedule for an employee:

The Ongoing Schedule is the default schedule for an employee. When a schedulable employee is added to the
system, an Ongoing Schedule must be created for the employee as described for changing the ongoing schedule.

1. Select the employee for whom you wish to view the Ongoing Schedule from the Employees menu.
2. Select the month and year for which you wish to view the Ongoing Schedule:

   By default, the Schedule screen shows the current calendar month.

   - The Ongoing Schedule for the selected employee is shown in the box preceding the first day of the month, highlighted in blue. Click this box to view the Ongoing Schedule (and its creation date) for the selected employee.

   For new employees, the Ongoing Schedule box shows the message “No Previous Schedule.”

3. To create or edit the Ongoing Schedule for an employee, click the date from which you want the schedule to start/change, and select Change ongoing Schedule from [date] until next schedule change.

   Use this option only if the employee’s regular daily/weekly schedule is changing. For vacations or other one-off changes to the schedule, see instructions below for modifying a single day.

   - The new Ongoing Schedule will appear in light blue starting on the selected date.

4. Select Doctor is scheduled to work for each weekday to be added to the schedule.

5. Change the Start and End time, and Lunch Start and Lunch Finished time.

   Setting the Lunch Finished to the same time as the Lunch Start will automatically remove the lunch period.

6. When the regular schedule has been changed as desired, click Update Schedule.

   - The new Ongoing Schedule will appear in light blue starting on the selected date.

   To return the Ongoing Schedule to its default state, click the day on which the schedule was changed, then select Delete Schedule Updates (goes back to regular schedule) from the shortcut menu.

To modify a single day in the schedule:

1. Select the employee from the Employees menu.

2. Select the month and year in which you wish to add a day to the schedule:

   By default, the Schedule screen shows the current calendar month.

3. Click the desired day in the calendar. To add a date or change the hours for that date, select Add [date] to Schedule (or change hours for this day). To remove an employee from the schedule for a date he or she is normally scheduled to work, select Remove [date] from Schedule.

4. If applicable, set the desired Start, End, Lunch Start and Lunch Finished times for the selected day and click Update Schedule.

   - Dates added or changed appear in green. Dates removed appear in pink.

   To remove an added day from the schedule or to return a modified day to its “normally scheduled” hours, click the desired modified day, then select Delete Day Added (goes back to regular schedule) from the shortcut menu.

Working with Schedule Page Defaults
To view or edit the ongoing schedule for an employee:

Schedule Page defaults are modified in the bottom-right corner of the Schedule screen in the Admin module. Changeable defaults include:

- Daily **start times, end times**, and **time intervals** between appointment slots.
- **Flag Text** – the text used for the **Flags** that can be selected when scheduling an appointment.
- **Default Daily View** – Calendar or **Schedule**.
- **Schedule Appt Text** – customizes the information that will appear on the schedule page for each appointment. Click the **Fields** button to insert a new field.
- **Appointment Types** – selections used in the **Appointment Type** dropdown menu, and the amount of time needed for each of these appointment type.
- **Employee Order** – the order employees appear on the schedule.

9.3.20 Tasks

The Task screen within the Administration module provides the same functionality as available through the Tasks module (see Section 4, **Tasks for details**), with the additional ability to modify the default Type when using the Task module.

See Section 4, **Tasks** for more instructions on working with tasks.

9.3.21 Updates

The Updates screen is used to update the Crystal PM software.

- To update the software, click **Check for Updates Online**. If an update is available the system will ask for confirmation and then download and install the update.
  
  ![Always back up your data before running an update.]

- The **Files to Send to Clients** screen is used to send specific additional files to client computers. **DO NOT** use this function except under the direction of an Abeo Solutions Technical Representative.
- Click **Show Log** to see a log of updates and what has changed in each release.
- Click **Share my Templates** to share your medical records templates, post-examination letters and/or procedures with other offices. Shared templates are available by selecting **EHR > Import Templates** from the top navigation menu (see **System Menus** on page 1-2 for more details).

9.3.22 VisionWeb

This screen manages your VisionWeb login credentials, allowing for seamless integration with the VisionWeb online ordering system.

To set up VisionWeb:

1. Register for VisionWeb by clicking the **Register Now** button at [www.visionweb.com](http://www.visionweb.com) and completing the registration process.
2 Enter your **Username** and **Password** in the **VisionWeb** screen within the Administration module in the Crystal PM system.

3 Click **Verify Login**.

4 Create new lab profiles or assign profiles, as needed:
   - The labs listed in the **Suppliers** dropdown are all the labs configured online on your VisionWeb profile. If the lab has already been entered into Crystal PM, select it and click **Assign to Existing Lab**. This action connects the online lab to the one you’ve created in Crystal PM.
   - For each lab that has not already been entered into Crystal PM, select it and click **Create New Lab Profile**. This creates it as a lab inside Crystal PM system automatically connected to the one online.

**9.3.23 VSP**

This screen manages your integration with Vision Service Plan, ensuring rapid authorization through the Crystal PM system.

**To set up VSP:**

1 Contact VSP at (800) 877-7195 and tell them you want to enroll in VSP with Crystal Practice Management.
   - Once you have registered for the integration, there will be a fee sent to Crystal which will be invoiced to your practice.

2 From the VSP screen in the Administration module, click **Yes**.

3 Enter your Eyefinity **Username** and **Password**, the **Office ID** given to you when you called VSP, and your **Office Phone** number.

   ![VSP Screen](image)

   **If each doctor has separate VSP credentials, leave this section blank.**

4 In the **Insurances** tab, scroll down to select the insurance companies you would like to be associated with VSP (e.g., Vision Service Plan, VSP Choice, etc.).

5 On the **Download List** tab, click **Download All Lists**. This will download the appropriate product names from VSP.

   ![VSP Screen](image)

   **If you have previously set up VSP, and you are simply updating to add new lists, double-click each item to add them individually. If your lists are incorrect or corrupt, click **Clear All Lists** and then download all lists again.**

6 Use the **Office Info** tab to verify that the correct doctors are associated with your account, and ensure that the correct **Tax ID** is being used.
7 On the **Custom Lab List** tab, select the labs that you use regularly. These labs will appear in the associated dropdown menus on the Frame Order page and the Claim page. If you don’t select any, then all will appear.

8 If each doctor uses separate VSP credentials, use the **Employees** tab to enter the information for each doctor and click **Save**.
   - If the doctor’s VSP tax ID is different from his regular tax ID, enter it in the **VSP Tax ID** field.

9 Click on **Defaults** in the left navigation.
   - The **Defaults** Admin screen opens.

9.3.24 Website

The **Website** screen provides the URL to send to patients so they can add or change their information online or access secure files sent to them by the practice. This screen also manages the templates for those pages and the System Files (e.g., patient education, new intake forms, etc.) to send to patients.

- The URL at the top of the screen is the **Patient Website URL**. Patients type this URL into their web browser and enter the **Passcode** provided to them to add or change their contact information or medical history (see Section 2.10.4, **Patient Website** on page 2-21 for more information).

- The **Upload Intro Webpage**, **Upload Patient / Med His Webpage** and **Upload Submitted Data Webpage** are used to upload the desired files to customize the patient website. The generate template links next to them are used to generate the files you can then customize. See Customizing the Patient Website below for more information.

- The URL under **Location of online documents** is the URL for the patient file manager. Patients type this URL into their web browser and enter the **Username** and **Password** provided to them to access Online Documents sent to them by your practice (see Section 2.10.3, **Online Documents** on page 2-21 for more information).

- The files listed in the **System Online Documents** are the System Files available to patients (see Section 2.10.3, **Online Documents** on page 2-21 for more information). Click **Find** to browse for the file, enter a
**Customizing the Patient Website**

Though basic functional customization of the patient website can be accomplished by carefully following the instructions below, it is highly recommended that you have someone with html knowledge perform this task. For more advanced editing, including customizing the design to match your company website, contact your web administrator.

The Patient Website provides an avenue for patients to enter new information or update their existing information to send to the Crystal PM system. The system has three basic components:

- **Intro Page:** Welcomes the patient to the website, provides a link for new patients and a passcode field for existing patients to take them to the next page.
- **Patient / Medical History Page:** Contains all the details to add/edit, including contact information, insurance, medical history, etc.
- **Submitted Data Page:** The last page the patient will see, after they have submitted the data on the previous page. Usually this will include a thank you and a link back to the practice’s main website.

**To customize the intro page:**

1. Click the *generate intro template* button and save the file in the desired location.

   **To see what the basic intro template looks like, double-click the file. It will open in a web browser.**

2. Open the `intro_page.html` file using a text or html editor.

   **Use an editor, not a web browser. If you don’t have another one, Notepad is perfectly fine to use for this purpose. At any time while performing the steps below, you can save the file and double-click `intro_page.html` to open it in a web browser to see what the file will look like.**

3. Add the desired text immediately below the third line, which says:

   ```html
   <body>
   <!-- Carriage returns will not appear, so you can use them to organize the text. -->
   <!-- To add a header or subheader, type `<h1>` or `<h2>` at the start and `</h1>` or `</h2>` at the end of the desired header/subheader text. -->
   <!-- Type `<p>` to insert a new paragraph. -->
   <!-- To emphasize text with boldface font, type `<b>` at the start and `</b>` at the end of the desired text. -->
   <!-- To emphasize text with italics, type `<i>` at the start and `</i>` at the end of the desired text. -->
   <!-- To underline text, type `<u>` at the start and `</u>` at the end of the desired text. -->
   
   When finished editing the file, save it.

4. In the Crystal PM software, click *Upload Intro Webpage.*

   **The new file will upload to the website.**

5. Visit the website to verify that the file uploaded correctly (see Section 2.10.4, *Patient Website* on page 2-21 for details).

**To customize the patient/medical history page:**
Instructions for generating a new patient template or medical history template are available by clicking generate patient template or generate medical history template.

1. Open the Patient module by clicking Patient button in the main toolbar.
   - If you don’t have a patient’s information already open, you will need to select a patient. The patient selected does not impact the rest of this procedure.

2. Select Configuration > Export New Patient WebPage from the main system menu.

3. Save the newPat.html file in the desired location.

4. Open the Records module by clicking Records button in the main toolbar.

5. Select a tab containing the fields you’d like to appear on the Patient Website for your patients to update.

6. Select Import / Export > Export Medical History Webpage from the main system menu.
   - There are two methods for exporting one of these pages. **Method 1** lists each field vertically, with the field name first and the textbox or dropdown menu immediately below it. **Method 2** attempts to insert the same type of formatting used on the page, as seen in the Crystal PM software. Method 2 is generally preferred when using a lot of checkboxes but may be more difficult to format correctly.

7. Save the file in the desired location.

8. Repeat Steps 5–7 above for all tabs you’d like to appear on the Patient Website.

9. Open the newPat.html file using a text or html editor.
   - Use an editor, not a web browser. If you don’t have another one, Notepad is perfectly fine to use for this purpose. At any time while performing the steps below, you can save the file and double-click newPat.html to open it in a web browser to see what the file will look like.

10. To change the name of one of the tabs (e.g., from Primary to Primary Insurance), edit the text in between the <h2> and </h2> tags for that tab header.

11. To change the name of a field underneath a tab (e.g., from Insurance Name to Insurance Company), edit the text between the <td> and </td> tags.
12 To delete a tab and all the content under it, select all the text from one `<h2>` header to the next (not including the next `<h2>` header) and click the `<delete>` button on your keyboard.

13 To add in the medical history page exported in Step 7 above, open that html file in your text or html editor, copy all the text, and paste it in place of the following text toward the bottom of the newPat.html file:

```
coming soon...
<!------- Insert Medical History Here -->
```

14 To add in a new tab for any additional pages exported in Step 8 above, insert the following text:

```
<div class="tabbertab">
  <h2>
  </h2>
</div>
```

This text should be inserted between the `</div>` tag (which ends one tab) and `<div class="tabbertab">` tag (which starts the next tab).

Insert the desired name for the tab in between the `<h2>` and `</h2>` tags, copy all the text from the other file and paste it below the desired header and above the `</div>` tag.

15 Rename the fields in the newly inserted tabs, using the instructions Step 11 above.

For the medical history fields in particular, most practices want to change the names of these fields. For example, instead of “Referred by” you may wish to say “Who referred you to our practice?”

16 When finished editing the file, save and close it.

17 Return to the Administration module of the Crystal PM software by clicking Admin in the main toolbar.

18 Click Website on the left navigation menu in the administration module.

19 Click Upload Patient / Med His Webpage.

20 Select the newPat.html file, and click Open.

   ♦ The new file will upload to the website.

21 Visit the website to verify that the file uploaded correctly (see Section 2.10.4, Patient Website on page 2-21 for details).

To customize the submitted data page:

1 Click the generate submitted data template button and save the file in the desired location.

2 Open the intro_page.html file using a text or html editor.

   ♦ Use an editor, not a web browser. If you don’t have another one, Notepad is perfectly fine to use for this purpose.

3 Add or edit the desired text in place of the following:

   Thank you..  Your profile has been submitted

   ♦ See the Intro Page, above, for more on basic html editing.

   ♦ To add a link back to your company website, insert the following:

```
<a href="">Return to [Company Name] website.</a>
```

   placing the URL in between the quotation marks, and replacing [Company Name] with your company name.

4 When finished editing the file, save it.
5 In the Crystal PM software, click **Upload Submitted Data Webpage**.
   ♦ The new file will upload to the website.

6 Visit the website and submit a simple change to verify that the file uploaded correctly (see Section 2.10.4, *Patient Website* on page 2-21 for details).