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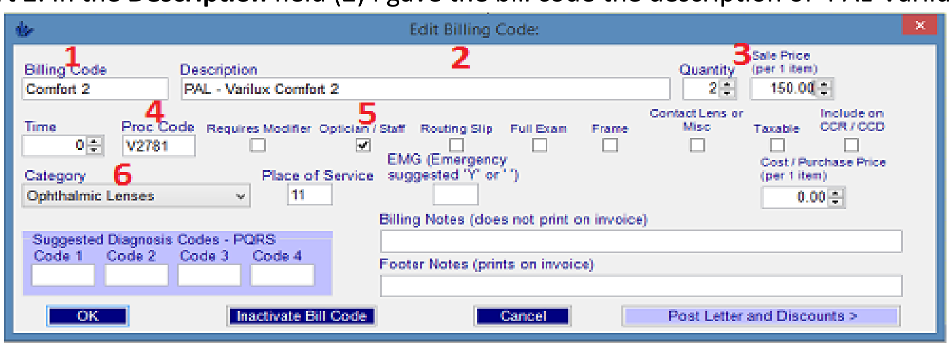
Spectacle Order Setup Guide

PLEASE NOTE IT IS ASSUMED THAT YOU HAVE GONE THROUGH ADMIN TRAINING AND HAVE BEEN SHOWN THE PROCESS FOR CREATING BILL CODES.

Bill Code Setup

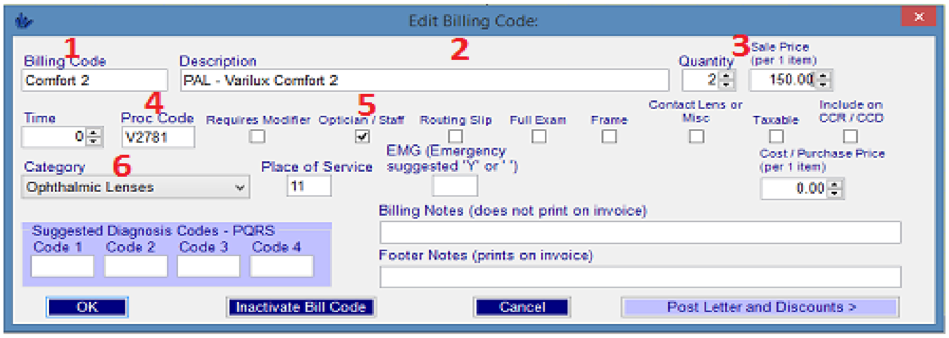
Go to the Admin in Crystal. The first section in the Admin area is called Billing. This is where you will create your billing codes for your ophthalmic lenses and lens options. **It is recommended that you create product specific billing codes for all of your ophthalmic lenses and ophthalmic lens add-ons**.

In the example provided below you can see that I sell the Varilux Comfort 2. For the **Bill Code** ID (1) you can see I named it Comfort 2. In the **Description** field (2) I gave the bill code the description of 'PAL-Varilux Comfort 2'



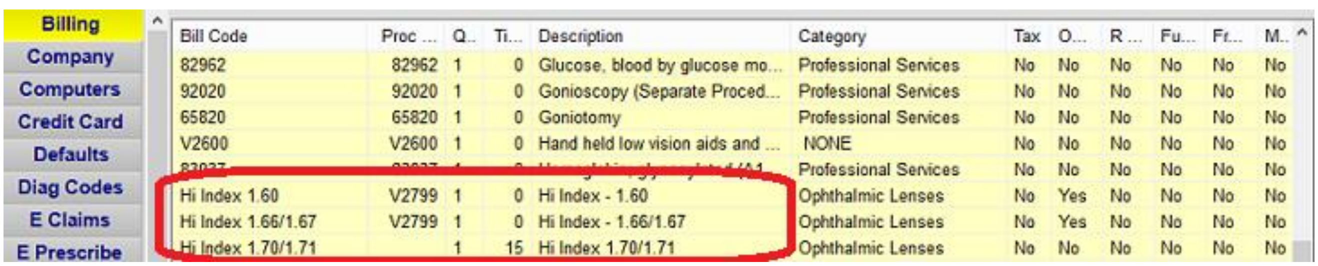
I sell my Cr-39 Varilux Comfort 2 for $300. In the Quantity and Sales Price area (3), I adjust the Quantity to two since I sell a lens for the (OD) and a lens for the (OS) and in the Sales Price (per 1 Item) I set the price for one lens. When this bill code is used in the Billing Section, Crystal will do the math and charge the $300 for the pair of lenses. Please see the example below

In the Proc Code Box (4) make sure you put in the appropriate procedure code for the lens or lens options. In the Optician/Staff box (5) it is recommended to put a check mark in this box for all of your ophthalmic lenses and ophthalmic lens add-ons. This box is used to track what items your opticians and staff sell to your patients. In the Category box (6) you can see I have categorized my Varilux Comfort 2 as an ophthalmic lens. Please see the example below



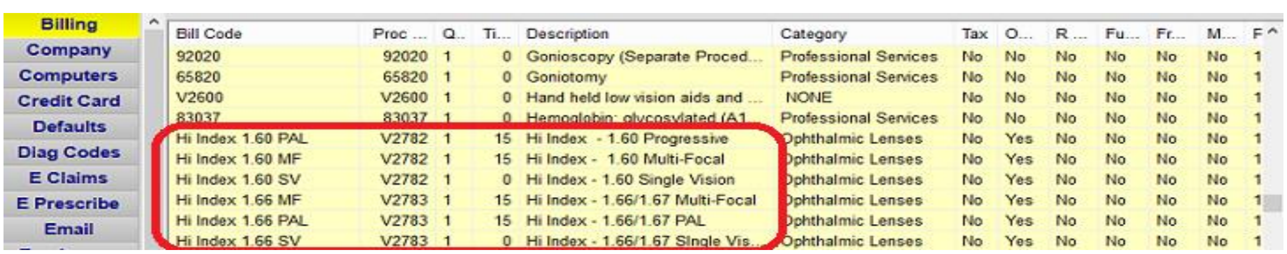
It is highly recommended that you categorize all of your billing codes in to specific categories. For example, your ophthalmic lenses and ophthalmic lens add-ons can be categorized as ophthalmic lenses or Lenses. You can, if you want, categorize you're your ophthalmic lenses under one category and your ophthalmic lens add-ons under another category. For example your ophthalmic lenses can be categorized as ophthalmic lenses and your ophthalmic lens add-ons can be categorized as ophthalmic lens add-ons.

When creating your billing codes please keep in mind your billing structure for material upgrades. If you charge a flat rate fee for material upgrades from SV to MF or PAL then you will only need to create individual billing codes for your material upgrades. Refer to the example below



Bill Code	Proc ...	Q..	Ti...	Description	Category	Tax	O...	R ...	Fu...	Fr...	M..
82962	82962	1	0	Glucose, blood by glucose mo...	Professional Services	No	No	No	No	No	No
92020	92020	1	0	Gonioscopy (Separate Proced...	Professional Services	No	No	No	No	No	No
65820	65820	1	0	Goniotomy	Professional Services	No	No	No	No	No	No
V2600	V2600	1	0	Hand held low vision aids and ...	NONE	No	No	No	No	No	No
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Professional Services	No	No	No	No	No	No
Hi Index 1.60	V2799	1	0	Hi Index - 1.60	Ophthalmic Lenses	No	Yes	No	No	No	No
Hi Index 1.66/1.67	V2799	1	0	Hi Index - 1.66/1.67	Ophthalmic Lenses	No	Yes	No	No	No	No
Hi Index 1.70/1.71		1	15	Hi Index 1.70/1.71	Ophthalmic Lenses	No	No	No	No	No	No

If you charge different fees for material upgrades based on SV, MF or PAL then you will create multiple bill codes for each material. Please refer to the example below.



Bill Code	Proc ...	Q..	Ti...	Description	Category	Tax	O...	R ...	Fu...	Fr...	M...	F
92020	92020	1	0	Gonioscopy (Separate Proced...	Professional Services	No	No	No	No	No	No	1
65820	65820	1	0	Goniotomy	Professional Services	No	No	No	No	No	No	1
V2600	V2600	1	0	Hand held low vision aids and ...	NONE	No	No	No	No	No	No	1
83037	83037	1	0	Hemoglobin; glycosylated (A1	Professional Services	No	No	No	No	No	No	1
Hi Index 1.60 PAL	V2782	1	15	Hi Index - 1.60 Progressive	Ophthalmic Lenses	No	Yes	No	No	No	No	1
Hi Index 1.60 MF	V2782	1	15	Hi Index - 1.60 Multi-Focal	Ophthalmic Lenses	No	Yes	No	No	No	No	1
Hi Index 1.60 SV	V2782	1	0	Hi Index - 1.60 Single Vision	Ophthalmic Lenses	No	Yes	No	No	No	No	1
Hi Index 1.66 MF	V2783	1	15	Hi Index - 1.66/1.67 Multi-Focal	Ophthalmic Lenses	No	Yes	No	No	No	No	1
Hi Index 1.66 PAL	V2783	1	15	Hi Index - 1.66/1.67 PAL	Ophthalmic Lenses	No	Yes	No	No	No	No	1
Hi Index 1.66 SV	V2783	1	0	Hi Index - 1.66/1.67 Single Vis...	Ophthalmic Lenses	No	Yes	No	No	No	No	1

The creation of the billing codes for your ophthalmic lenses and ophthalmic lens add-ons is crucial. When creating your bill codes for your ophthalmic lenses make sure you set the price for the Cr-39 cost. Also make sure to create a generic bill code for frames. You will need just one or two generic frame billing codes. The one or two frame billing codes you create will be used in the Frame Page Defaults Section. The frame bill code(s) you create essentially act as pointers to look in the Inventory section of Crystal when the billing code used. **Again it is recommended that you create product specific billing codes for all of your ophthalmic lenses and ophthalmic lens add-ons and create at least 1 generic frame billing code.**

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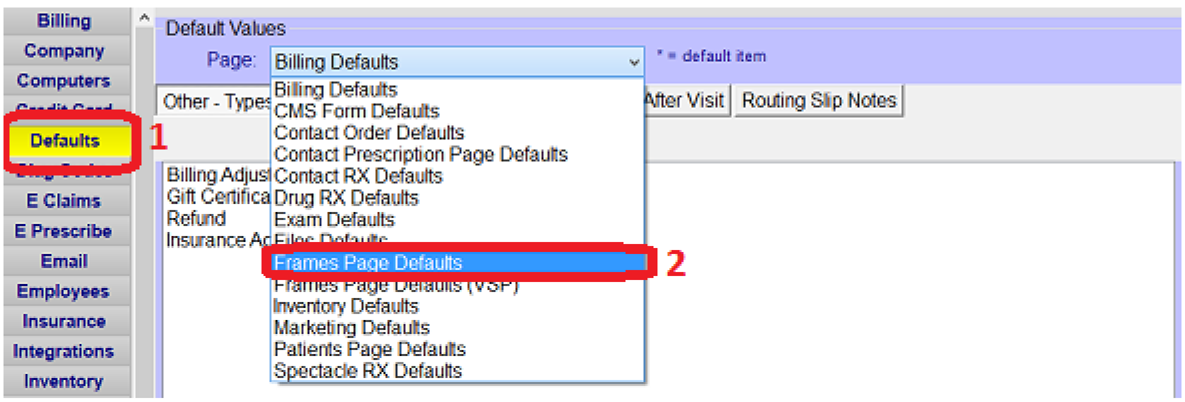
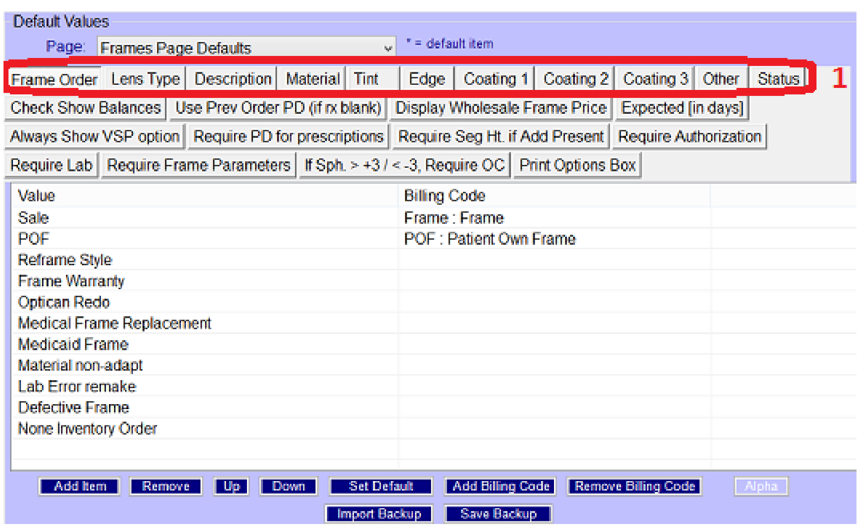
Frame Page Defaults

When you're done creating all of your billing codes for your ophthalmic lenses and ophthalmic lens add-ons in the Billing area of the Admin section, you will need to navigate to the Defaults area in the Admin section (1). Select "Frame Page Defaults" (2). See the example below.



The Frame Page Defaults area is where you go to set up all of the functionality and drop-down options for your Spectacle Lab Order screen. Please refer to the example below.



In the picture above, you can see that this section has a lot to it. The main areas we will be discussing in this guide will be the top eleven boxes starting at Frame Order and ending on Status (1). Each one of these eleven sections must be edited to reflect the products and services your office provides for your patients in regards to creating a spectacle lab order.

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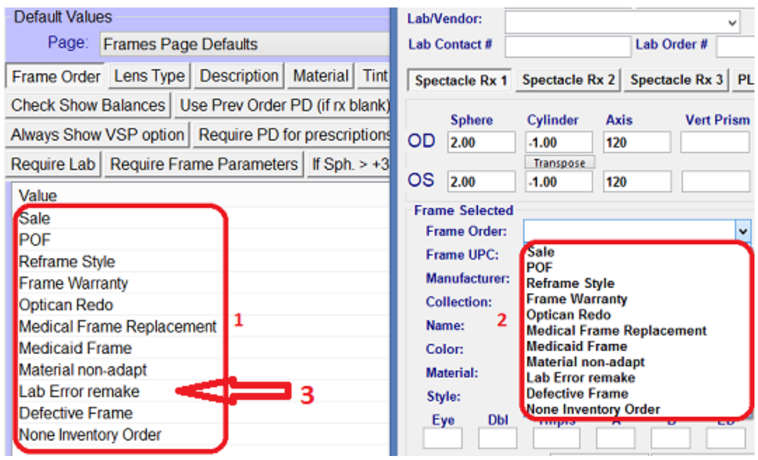
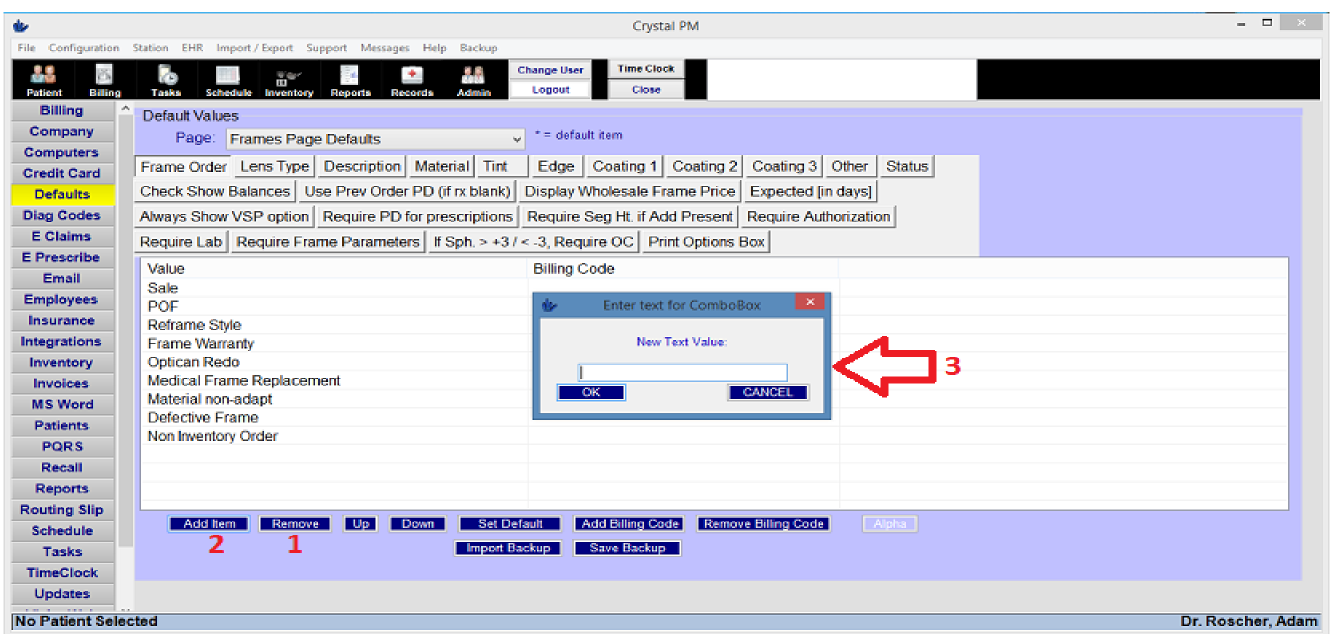
FRAME ORDER

The first section we will cover is called "Frame Order". In this section, you will create all of the values that coincide with what your office considerers to be a frame order. In the picture below you can see that the options listed here on the left side of the picture in the Frame Order section (1) are the same options that are listed in the Frame Order section of the Spectacle lab order screen on the right (2).

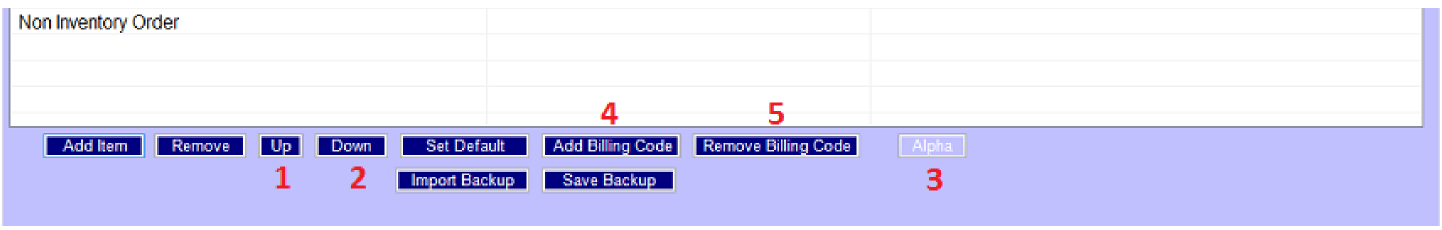


In this Frame Order section you can add or delete values as you see fit. In the picture above you can see a value on the left hand side that says 'Lab Error Remake' (3). If you wanted to remove this value because it did not coincide with what you deem to be a frame order then you would highlight that value and press on the 'Remove' button (1) at the bottom of the screen. Refer to the example below.



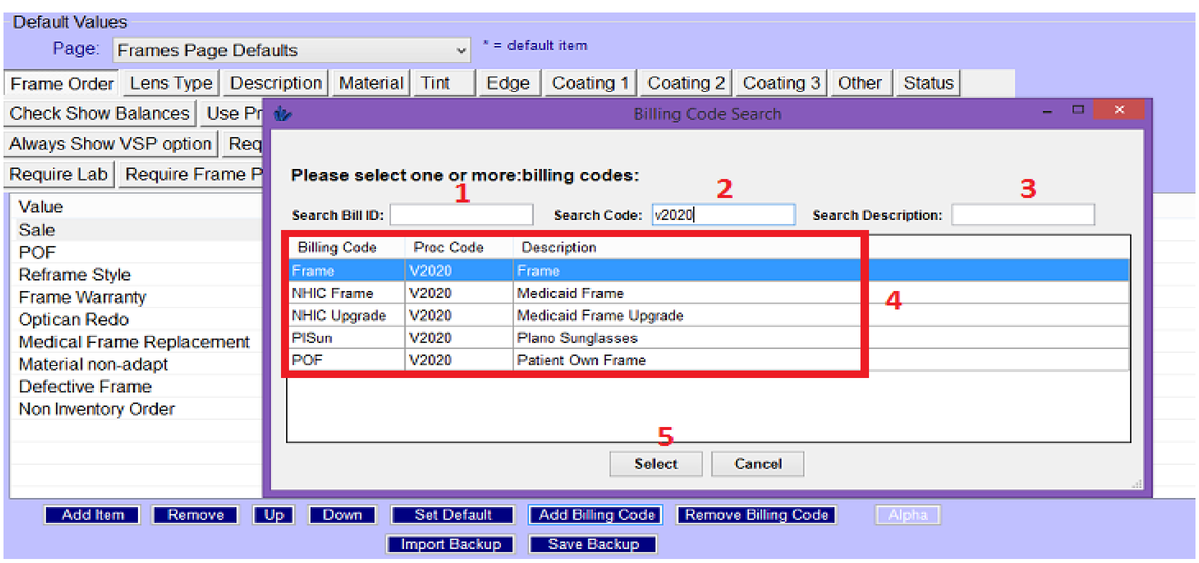
Once you press the 'Remove' button the 'Lab Error Remake" value will be deleted from the list. To add values to the Frame Order section press on the 'Add Item' button (2), please refer to the picture above. Once you click the 'Add Item' button, a small window will open allowing you to enter the new value you want (3). Type the value you want to add inside of the box and press ok to add the value to the list.

Any values you add will appear at the bottom of the list. You can customize the order of the list by highlighting values and either pressing the up button (1) or the down button (2). You can also alphabetize the list by pressing the Alpha button (3), please refer to the picture below.



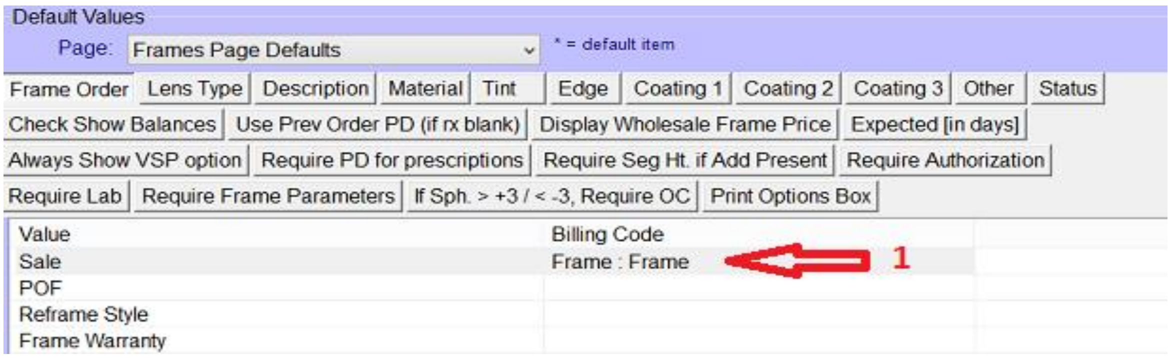
When you are done creating the values that you want in this section you will need to link your frame billing code to the value that will coincide with a frame sale. To do so, click on the value that will coincide with a frame sale then press the Add Billing Code Button (4)

Once you press the Add Billing Code button, a Billing Code Search window will open up allowing you to search for your bill code. Please refer to the picture below. You can search for the billing code by the Bill code ID (1), the Procedure code (2) or the description of the bill code (3)

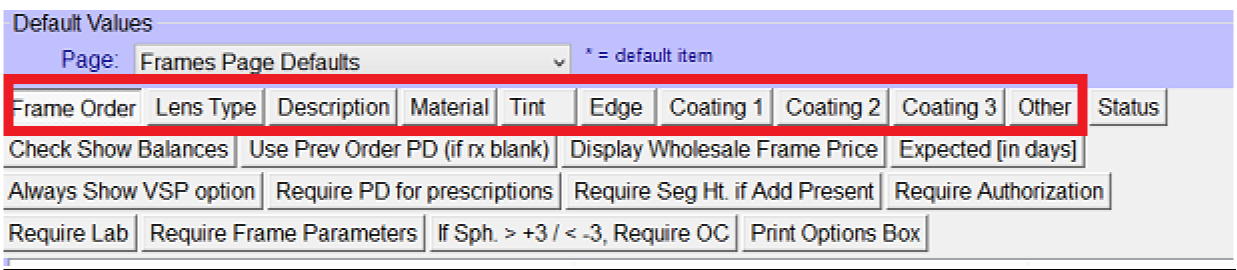


In the example above, I am searching for my frame billing code by entering in the procedure code in the Search Code box (2). You will notice that after I put in the appropriate procedure code I get a list of possible billing codes I can use (4). For this example, I will select the first bill code in the list, and then at the bottom of the Billing Code Search box I will press the Select button (5).

As you can see in the picture below, after the Select button is pressed, the bill code will link to the value in the list (1)

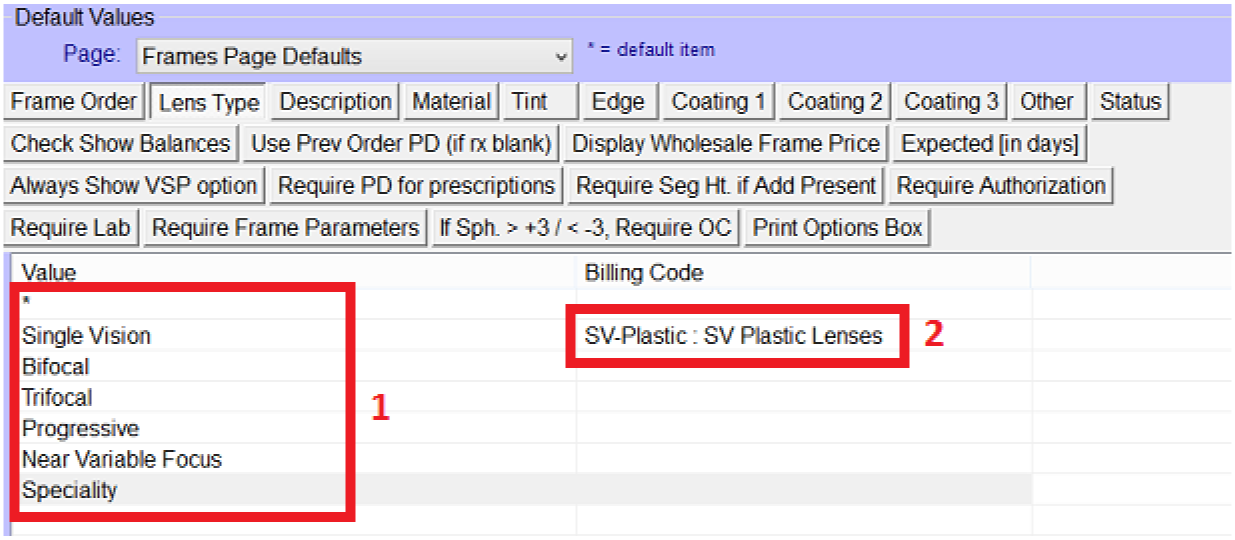


The only bill code(s) that need to get linked to the Frame Order section are those bill code(s) that correspond with a frame sale. This procedure for linking bill codes will be used throughout the first 10 sections in the frame page defaults area (1) see the picture below.



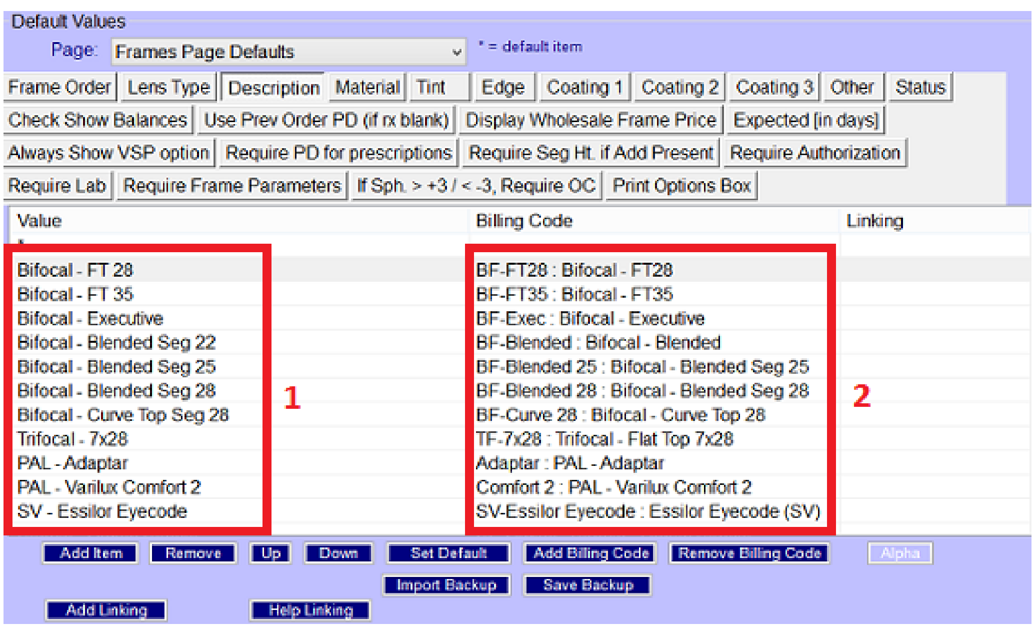
LENS TYPE

The next area we will discuss will be the Lens Type. In the Lens Type section of the Frame Page Defaults you will want to list all of the basic lens types. As you can see in the example below I have my lens types listed as Single Vision, Bifocal, Trifocal, Progressive, Near Variable Focus and Specialty (1). The set up for this should be simple, as the values listed in the example are essentially the basics of Lens Types. You will also notice in the example below that I have linked a bill code to the Single Vision value (2). It is recommended that you link a bill code to this value as well. The bill code you link here should be the bill code that coincides with a single vision Cr-39 lens. No other bill codes will need to be linked in Lens Type section.



DESCRIPTION

The next area we will talk about will be the Description. In the Description section of the Frame Page Defaults you will want to list the specific ophthalmic lenses you provide your patients and link the corresponding bill code to those values. As you can see in the example below I have listed the specific ophthalmic lenses I provide my patients (1). I have also linked the corresponding bill codes to the values in this section (2).

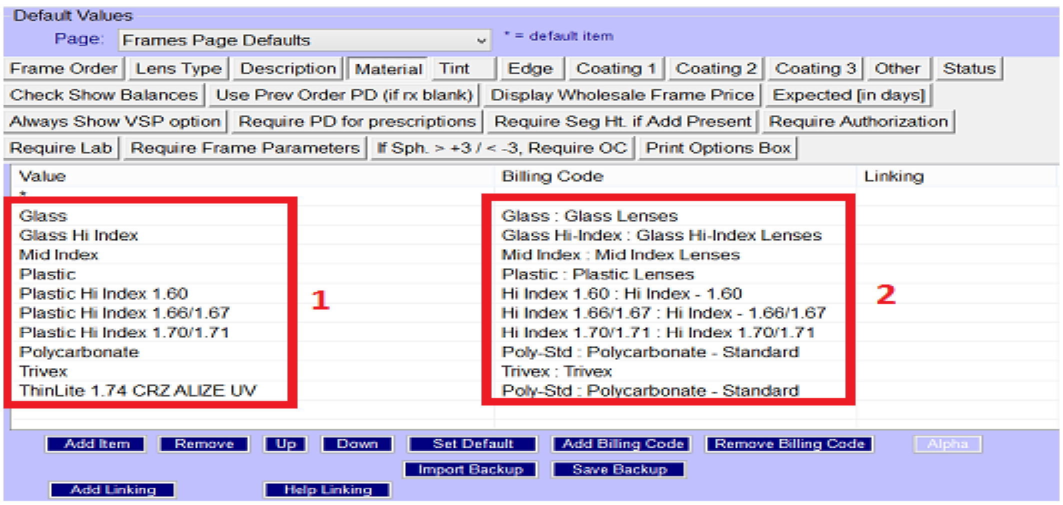


It is recommended that when you link bill codes in this section that you link the bill codes that corresponds with the Cr-39 cost for that specific lens. Material add-ons are done in the next section.

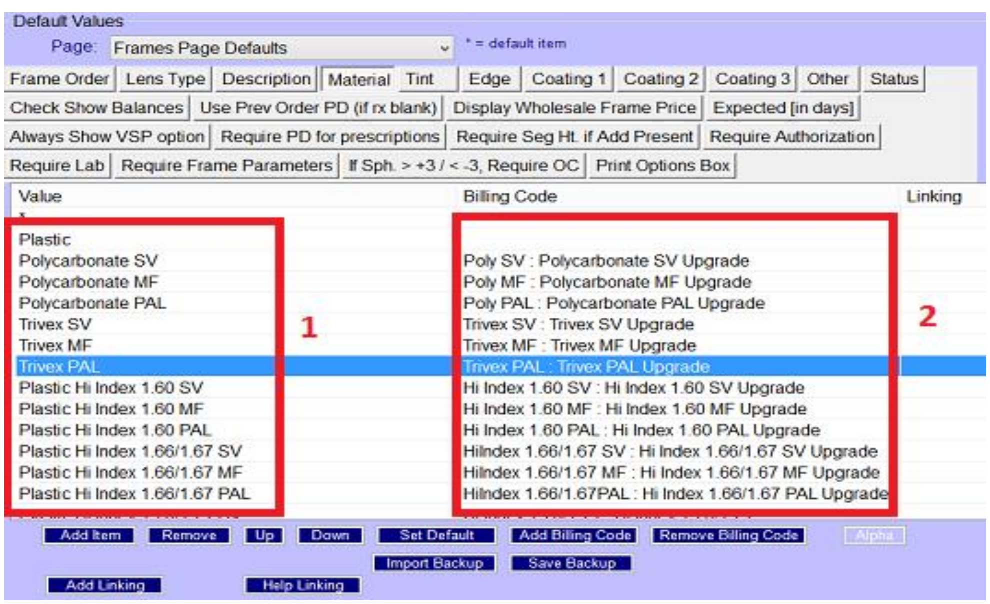
MATERIAL

The next area we will talk about will be the Material. In the Material section of the Frame Page Defaults you will want to list all the different lens materials you offer your patients. When creating your material values in this section please keep in mind your billing structure for material upgrades.

If you charge a flat rate fee for material upgrades from SV to MF or PAL then you will only need to create individual values for your material upgrades (1) and then link the corresponding bill codes (2). See the example below.

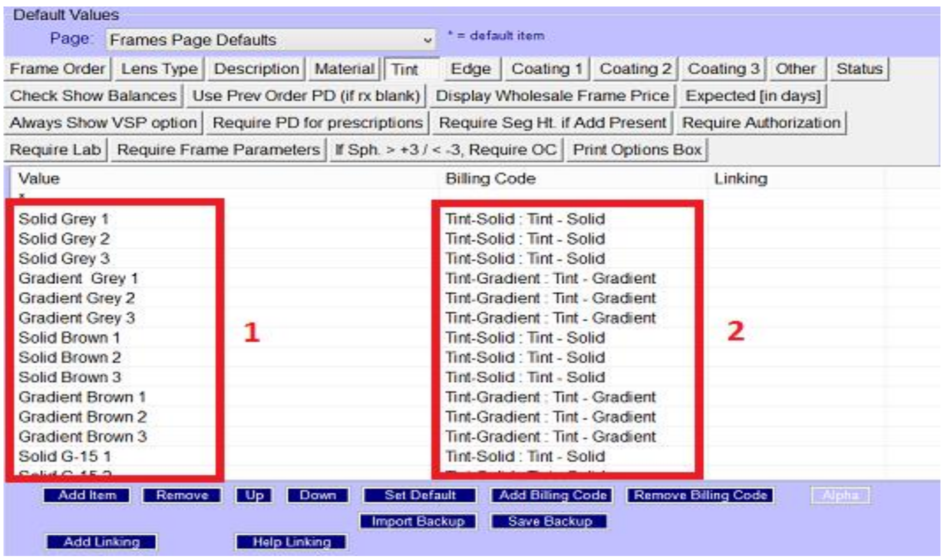


If you charge different fees for material upgrades based on SV, MF or PAL then you will need to create multiple values for each material (1) except plastic then link the corresponding bill code (2). Please refer to the example below.



TINT

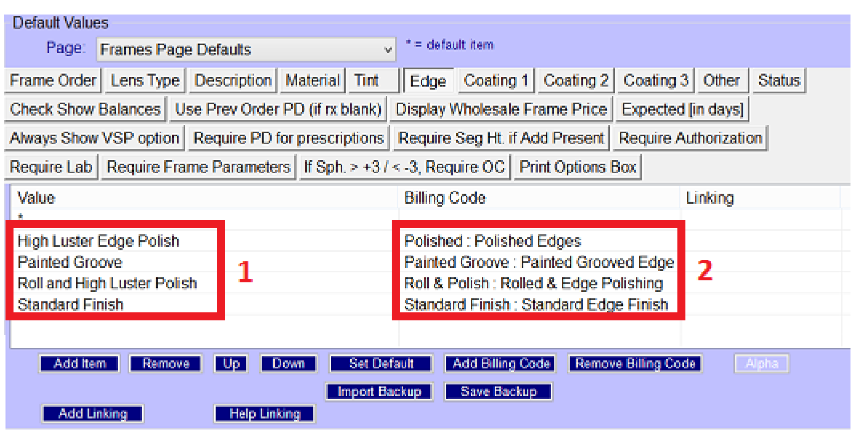
The next area we will talk about will be Tint. In the Tint section of the Frame Page Defaults, you will want to create values for your tints and link the corresponding bill codes. In this section you can get as specific as you want. In the example listed below I have listed all of the most common types of tints to include gradient and solid tints (1) and linked the corresponding bill codes (2)



You do not have to get this specific if you do not wish to. You can, if you want, just create a value that says “Solid Tint” and a value that says “Gradient Tint” and then link the corresponding bill codes.

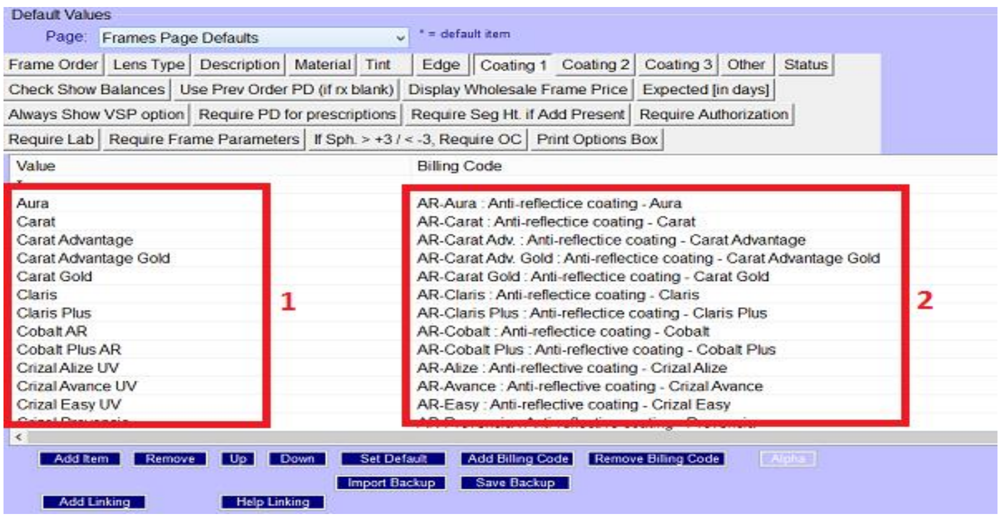
EDGE

The next section we will discuss will be the Edge section. In the Edge section of the Frame Page Defaults, you will want to create values that correspond with the different edge treatments you provide your patients. In the example below you can see I have listed the most common lens treatments I offer my patients (1) and have linked the corresponding bill codes to those values (2)

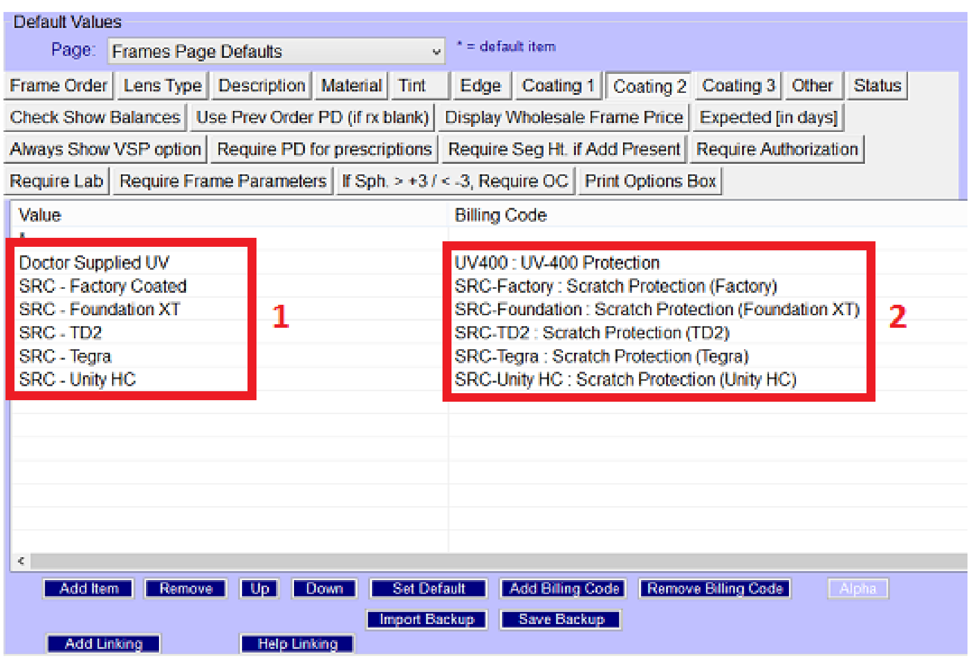


COATING 1, COATING 2 AND COATING 3

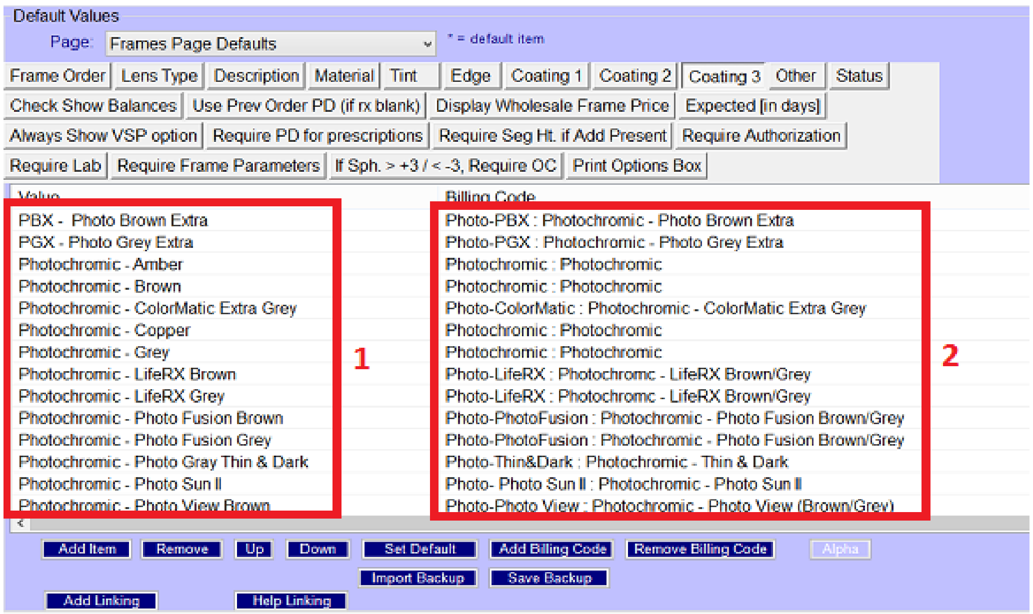
The next sections we will discuss will be the sections labeled Coating 1, Coating 2 and Coating 3. In the Coating sections of the Frame Page Defaults you will want to create values for all of the coatings and add-ons you provide your patients. In the example shown below you will see that in Coating 1 I have listed all of my anti-Reflective coatings (1) and linked the corresponding bill codes to those values (2)



In Coating 2 I have listed all of my scratch coats and UV coatings (1) and linked the corresponding bill codes (2) please refer to the example below.



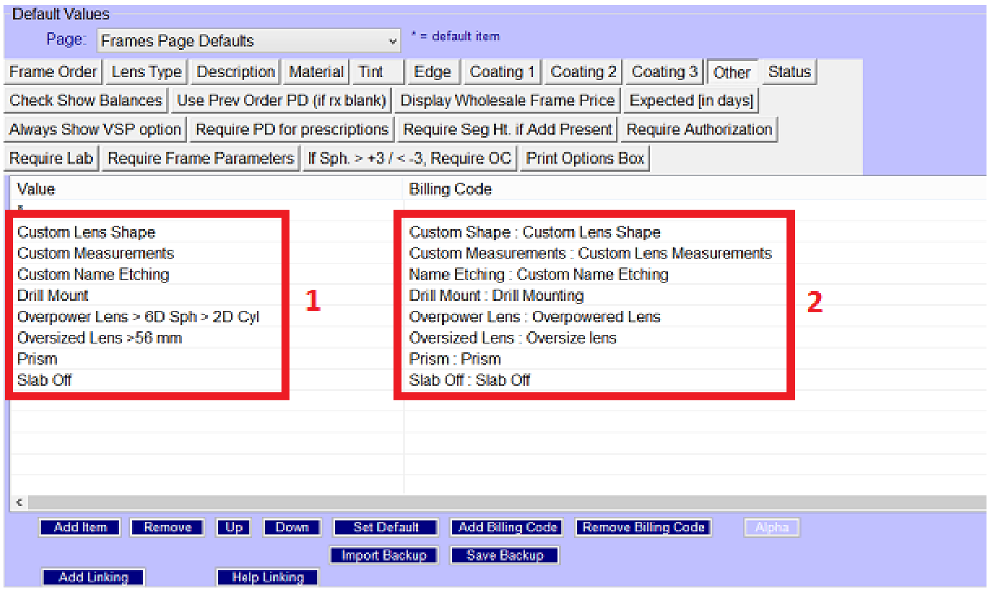
In Coating 3 I have listed all of my photochromic and polarized lenses (1) and linked the corresponding bill codes (2) Please refer to the example below.



When setting up Coating 1, Coating 2 and Coating 3 please keep in mind that you can set these sections up however you like. The way they are set up in this guide is merely a suggestion. In this guide I put all of my anti-reflective coatings in Coating 1. You can, if you want, put all of your scratch and UV coatings in Coating 1 and put all of your anti-reflective coatings in Coating 2.

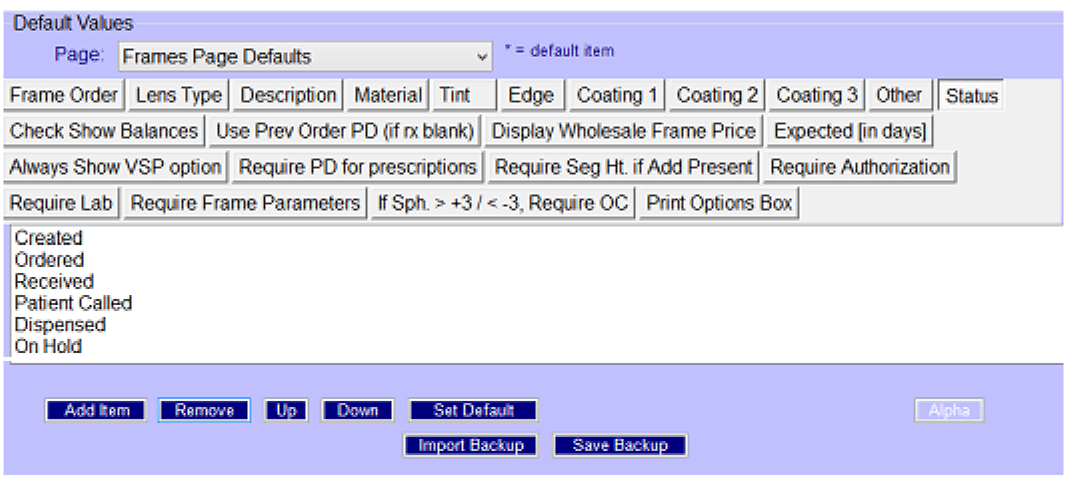
OTHER

The next section we will discuss will be the section labeled other. In the Other section of the Frame Page Defaults you will want to create values that coincide with all of the extra services that you provide your patients that have not been listed in throughout the other sections of the Frame Page Defaults. In the example provided below you can see I have listed all of the extras I provide my patients (1) and linked the corresponding bill codes (2)



STATUS

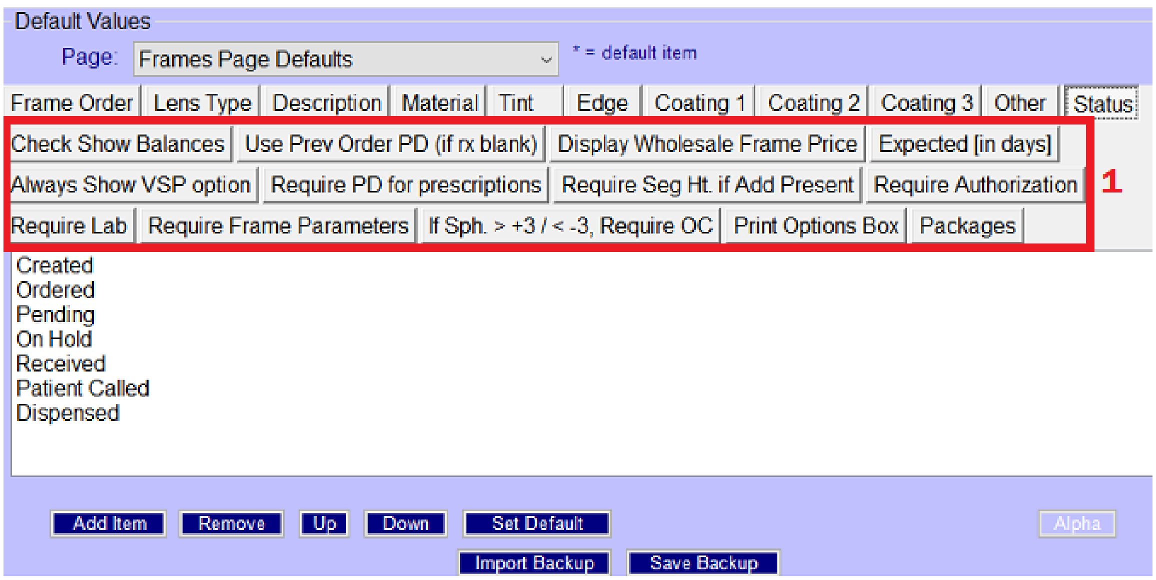
The last section we will discuss will be the Status section. Statuses are used to denote what stage the glasses are in during the order/production process. In the Status section of the Frame Page Defaults you will want to create all of the various status changes that glasses go through. In the example provided below you can see I have a list of values that give the general status of where my glasses order is during production.



Crystal does not automatically update the status in the Spectacle Lab Order screen. Status must be changed manually as the glasses go through the production process. After the optician creates the order they will want to mark it as ‘Created’. After the lab staff orders the glasses they will want to mark it as ‘Ordered’. Once the glasses arrive from the lab completed the lab staff will want to mark the glasses as ‘Received’. Updating the status is an important part of the glasses production process. Keeping the status updated and accurate will allow you to run reports to see where jobs are in the production process.

OTHER FRAME PAGE DEFAULT OPTIONS

Setting up the first eleven sections of the Frame Page Defaults is a crucial part of how the Spectacle Lab Order screen will function in your office. You do have other options that can be selected to enhance how the Spectacle Lab order screen will function. In the example below you will see a number of other options you can set up (1). Below I will give a brief synopsis of what each of these options are



Check Show Balances – Gives you the option to view patient balances on the Spectacle Lab Order screen.

Use Prev. Order PD (if rx blank) – Gives you the option to pull the PD from a previous order if the PD is left blank on the current order.

Display Wholesale Frame Price – Gives you the option to view the wholesale frame price on the Spectacle Lab Order Screen.

Expected (in Days) – Gives you the option to set what the default turnaround time is for your spectacle orders.

Always Show VSP Option – Give you the option to use the VSP defaults instead of the regular frame page defaults when creating spectacle lab orders

Require PD for Prescription – Gives you the option to set whether or not you require a PD on the Spectacle Lab Order screen when creating an order.

Require Seg. Ht. if Add Present – Gives you the option to set whether or not you require a seg height if an add is present when creating an order.

Require Authorization – Gives you the Option to set whether or not you require a number be entered in the Authorization box on the Spectacle Lab order Screen.

Require Lab – Gives you the option to set whether or not you require a Lab name be entered in the Lab box on the Spectacle Lab Order screen.

Require Frame Parameters - Gives you the option to set whether or not you require Frame Parameters be entered in on the Spectacle Lab Order screen.

If Sph. > + 3/< - 3, Require OC – Gives you the option to set whether or not you require an OC be entered if the power is above a +/- 3

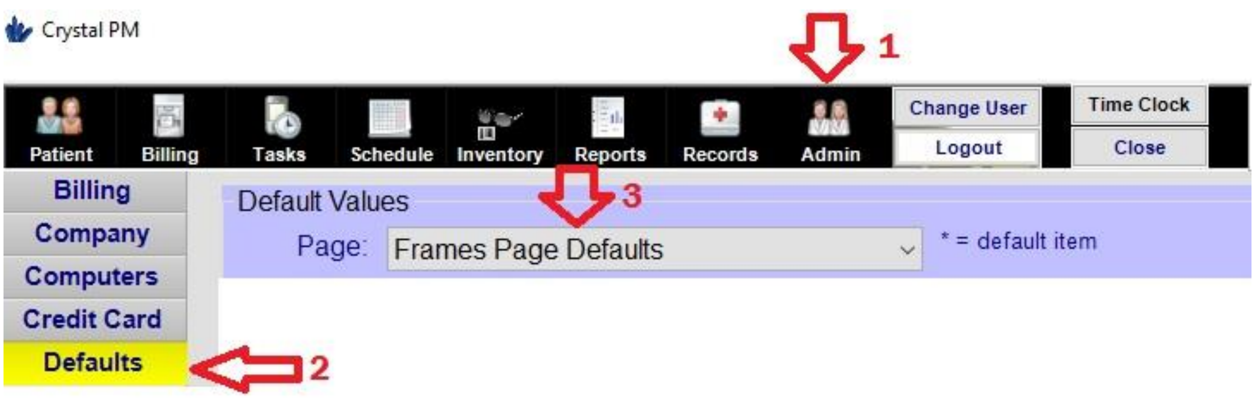
Print Options Box – Gives you the option to set whether or not you want to print out which ophthalmic lens options list you used: Either the VSP options list or the Frame Page Default options list.

Packages – Gives you the option to create packages that you can select from when creating an order.

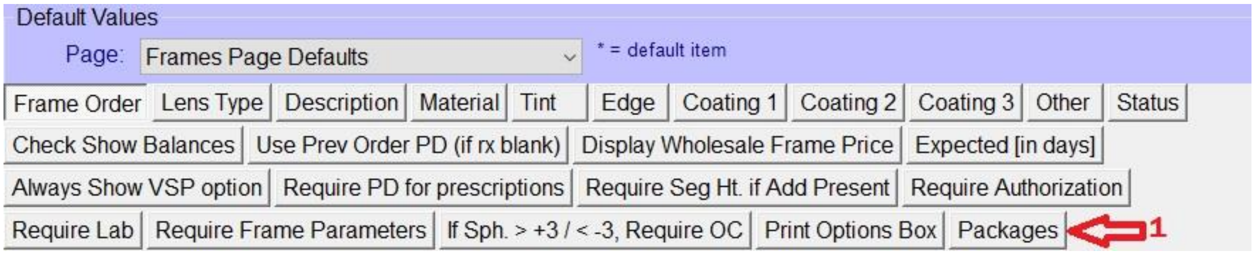
How to Create Package Options in Frame Page Defaults.

Before setting up your packages it is assumed/recommended that you have gone through the optician training and setup your optical so that a routing slip populates after creating an order

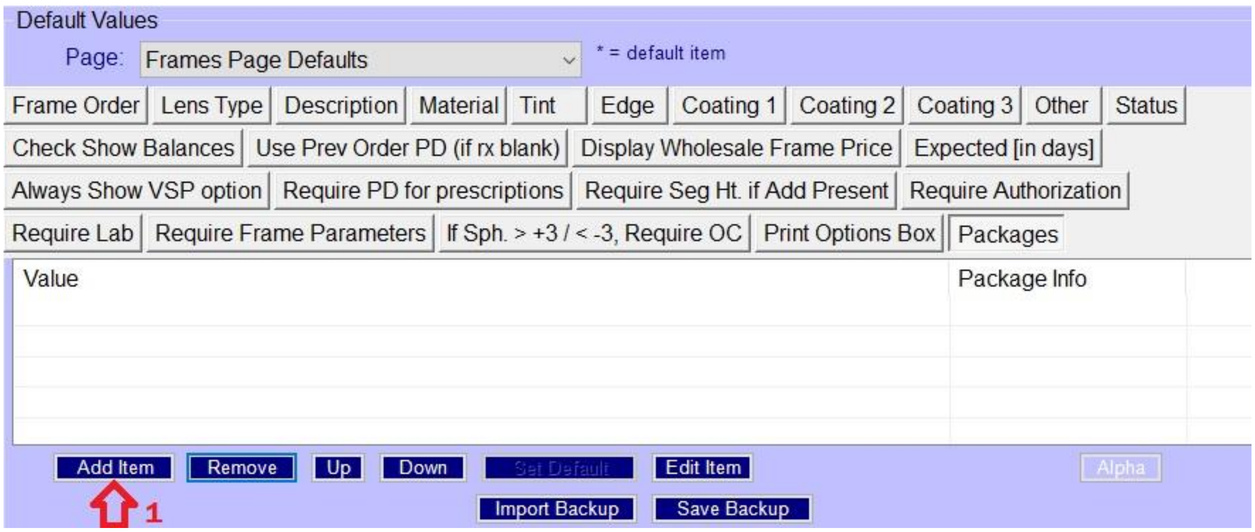
In order to set up packages in Crystal you will need to first navigate to the **Admin** section in Crystal (1). Once in the Admin section you will need to navigate to the left hand side of the screen and select **Defaults** (2). In this section you will need to select **Frame Page Defaults** from the drop down list at the top of the screen (3).



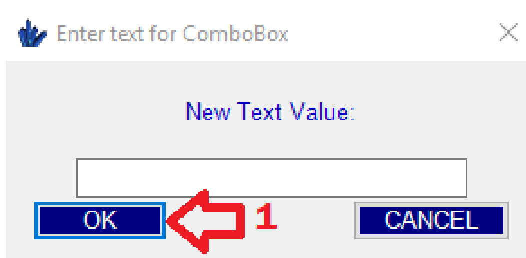
Once in the Frame Page Defaults section you will need to select the **Packages** button (1).



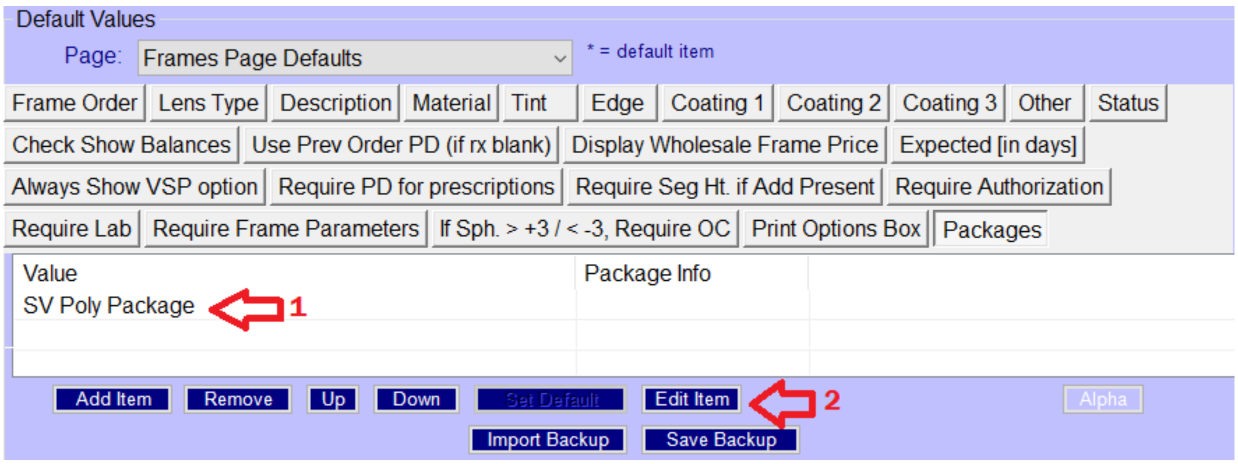
You will now need to create the name of your ophthalmic lens package. To do this you will need to press the **Add Item** button located at the bottom of the screen (1).



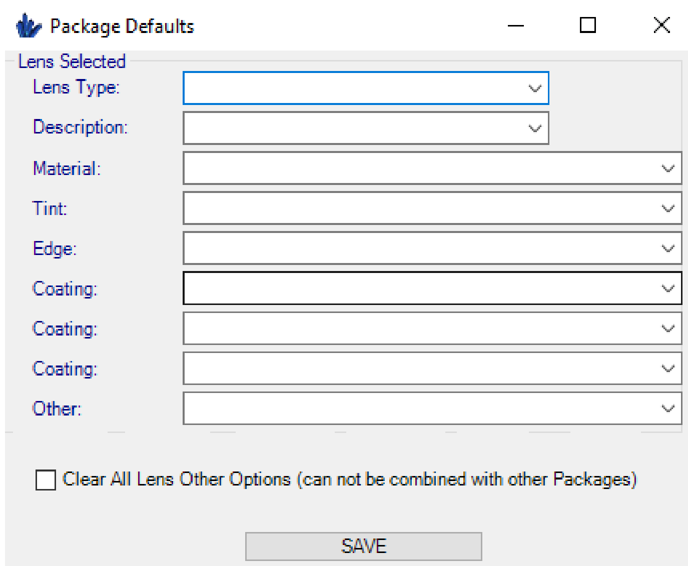
This will open a small window in the middle of the screen. You will need to enter in the name of the package you are trying to create in this window. Once you are done entering in the name of the package you wish to create press the **OK** button (1)



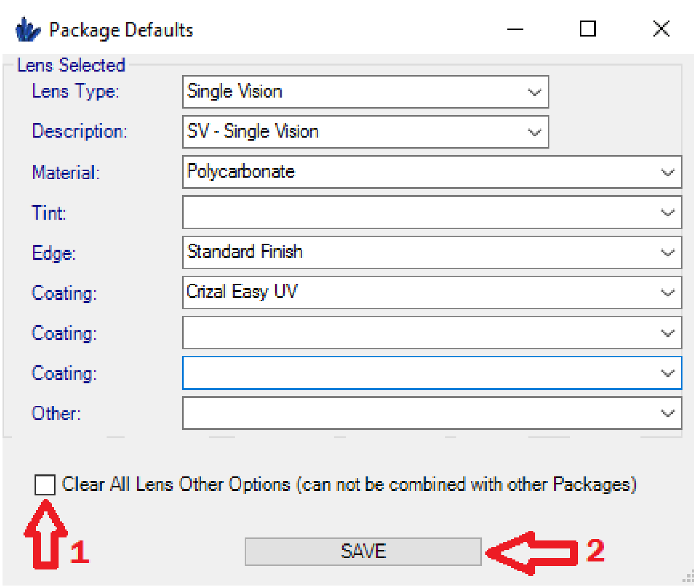
You will now see the name of your ophthalmic lens package appear on the screen (1). At this point you will need to add the items you want your ophthalmic lens Package to contain. To do this you will need to press the **Edit Item** button located at the bottom of the screen (2).



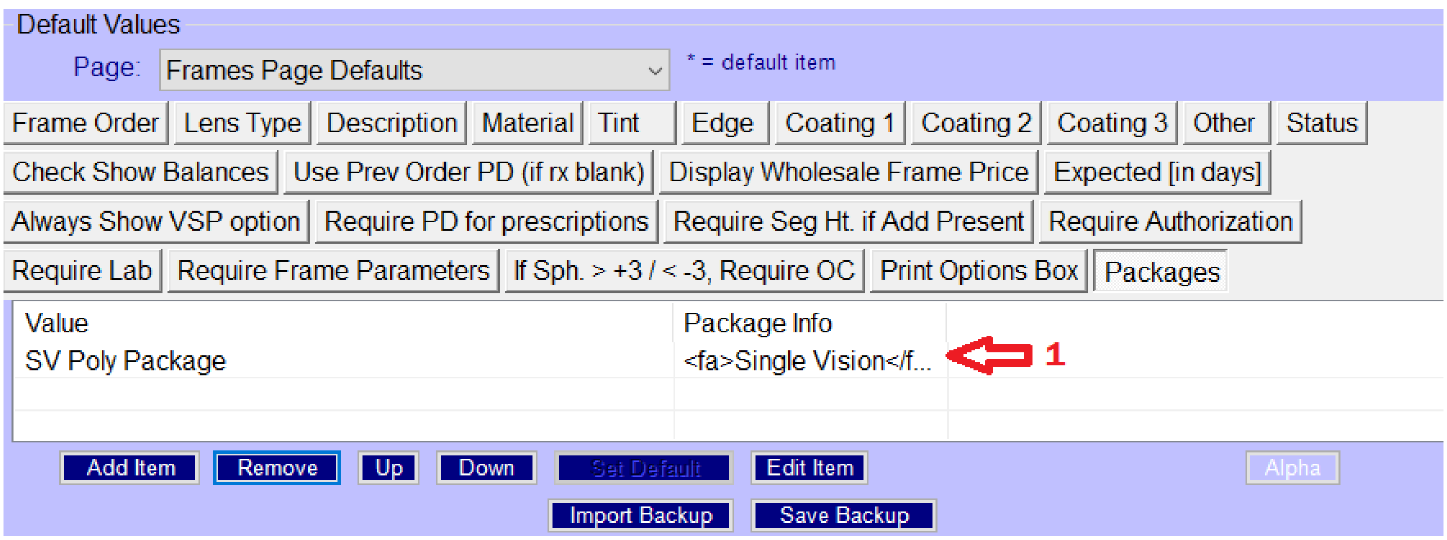
You will now see the Spectacle Lab Order window flash open and close. This is normal. After that window closes you should see a window appear called **Package Defaults**. This is where you will enter in the items you want on your ophthalmic lens package.



From the Package default window you will need to select the Lens Type, Description, Material, Tint, Edge, and any applicable coatings you wish to add to your ophthalmic lens package. You will notice a check box that says **Clear All Lens Options** (1). Selecting this option will make the package eliminate and replace all items that were previously entered during the ordered process. When you are done selecting the items press the **Save** button at the bottom of the Package Defaults window (2).



Once you press save, you will see some information appear in the **Package Info** column (1). You have now created your first package. To test if your package is working correctly, navigate over to the Patient module, go to the prescription tab and press the Frame button to create an order.



Setup Options for Packages

There are a number of ways to create the package pricing You can bundle your package options in to one bill code or you can have an al a carte style setup for your package options. It is recommended to do a more al a carte style setup for your packages and create package discount bill codes to help offset the full cost of the package

In the example below you can see that I have charged my patient for a frame, Varilux Physio, Polycarbonate material upgrade, tint, AR and a roll and polish. Because this is not a package I will charge my patient the full price of $700

Bill Code	Proc Code	MC	Description	Qnt	Emp	Insurance	Amount
Frame	V2020		Frame UPC:1234567899 Nike Flexon	1			170.00
Physio	V2781		PAL - Varilux Physio	2			250.00
Poly-Prm	V2784		Polycarbonate - Premium	2			80.00
Tint-Gradien	V2740		Tint - Gradient	2			30.00
Roll & Polis	V2799		Rolled & Edge Polishing	2			20.00
AR-Avance	V2750		Anti-reflective coating - Crizal Avance	2			150.00

Import from R Slip | Switch to Quote | Check Invoice | Credit Transfer | Save Invoice | VSP Calc | ☑ Show Insurance Details

Invoice Balance — Patient: $700.00 — Insurance: $0.00

In the example below you can see that I have charged my patient for a frame, Varilux Physio, Polycarbonate material upgrade, tint, AR and a roll and polish. This time I wish to charge this patient for the package price. As you can see I have added a package discount bill code to help offset the full price of the options and set the monetary value of the bill code to a negative number.

Bill Code	Proc Code	MC	Description	Qnt	Emp	Insurance	Amount
Frame	V2020		Frame UPC:1234567899 Nike Flexon	1			170.00
Physio	V2781		PAL - Varilux Physio	2			250.00
Poly-Prm	V2784		Polycarbonate - Premium	2			80.00
Tint-Gradien	V2740		Tint - Gradient	2			30.00
Roll & Polis	V2799		Rolled & Edge Polishing	2			20.00
AR-Avance	V2750		Anti-reflective coating - Crizal Avance	2			150.00
Package Di			Package Discount	1			-200.00

Import from R Slip | Switch to Quote | Check Invoice | Credit Transfer | Save Invoice | VSP Calc | ☑ Show Insurance Details

Invoice Balance — Patient: $500.00 — Insurance: $0.00

Tying it all together

Going through and setting up the Frame Page Defaults as described in this guide will allow your staff members to create spectacle lab orders and then have the order information pulled off of the order and turned into a routing slip which then can be turned in to an invoice. This set up will help speed up the process for creating lab orders and the subsequent invoice for that lab order. We will discuss this process in the next section.

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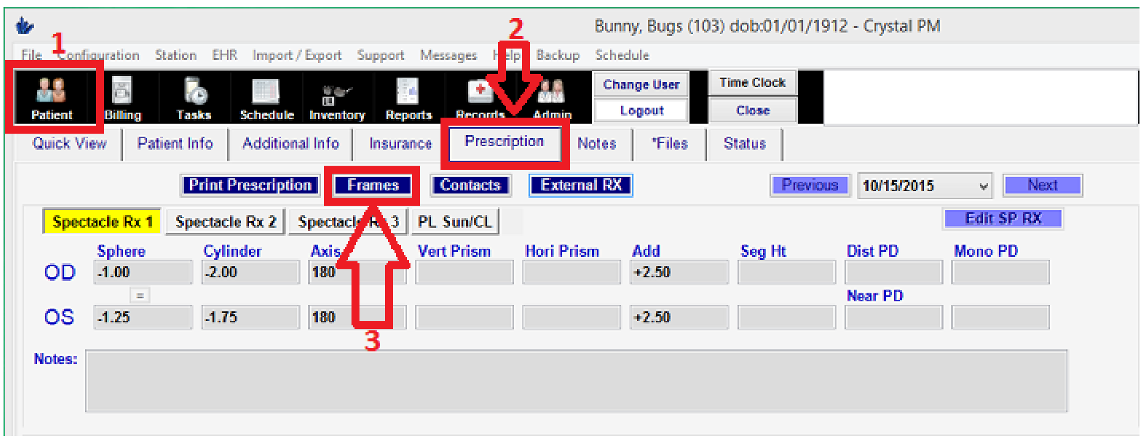
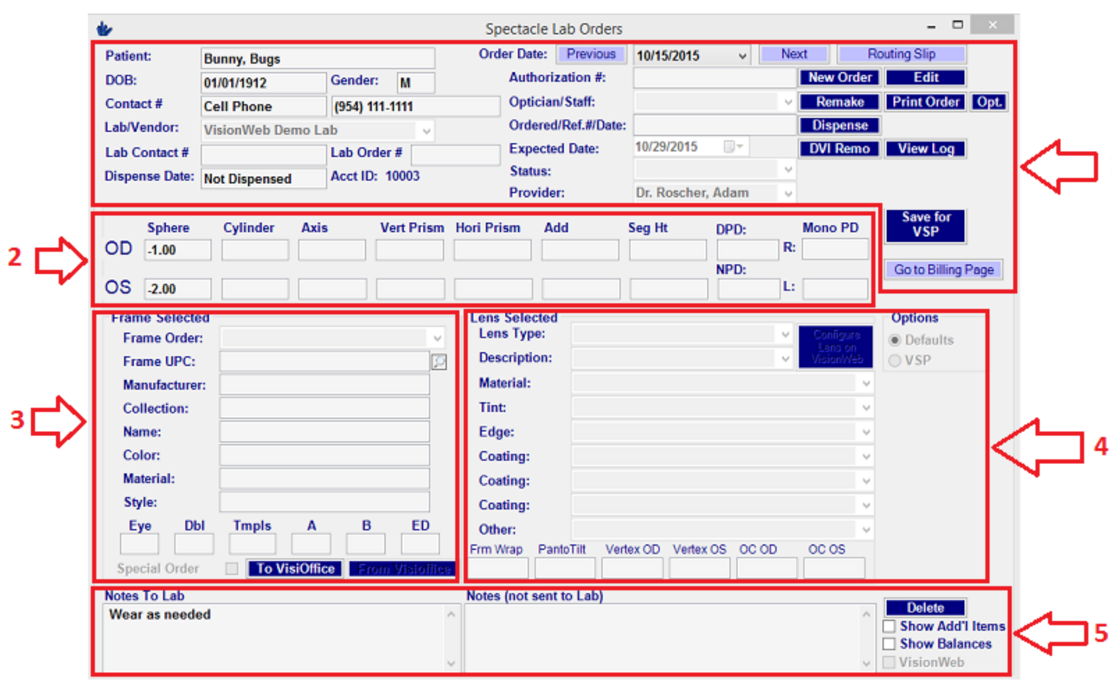
Spectacle Lab Order

Now that you have gone through and created your ophthalmic lens and ophthalmic lens add-on billing codes, and set up your Frame Page Defaults, it's time to test how all of this will work. In order to get to the Spectacle Lab Order screen you will need to go to the Patient module in the top left corner of Crystal (1), navigate to the Prescription tab (2) then press on the **Frames** button (3). Please refer to the example below.

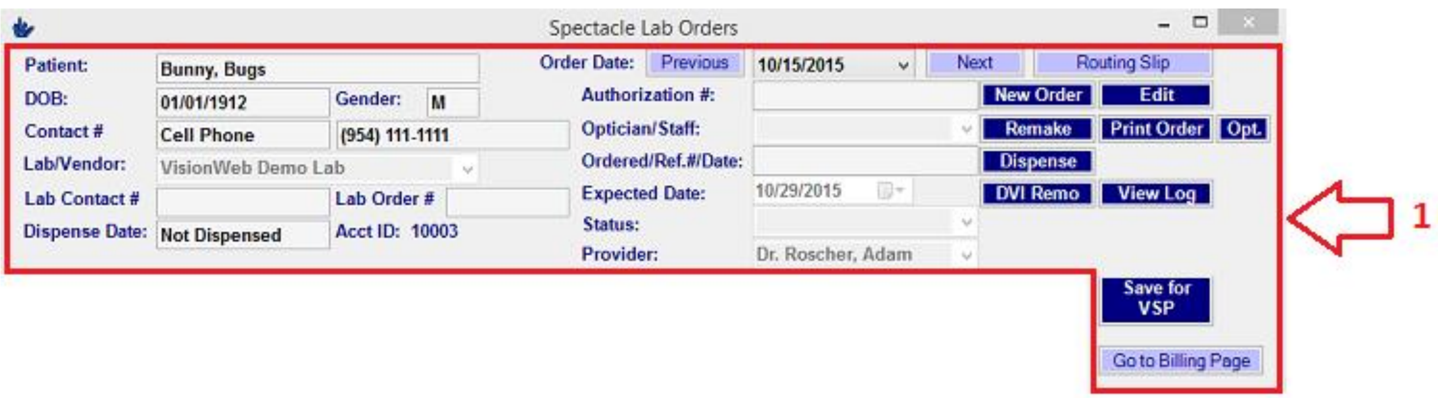


SPECTACLE LAB ORDER SCREEN BREAKDOWN

You will notice from the example below that after you press on the **Frames** button, the Spectacle Lab Order screen will open. There is a lot to the Spectacle Lab Order screen, so before we begin the order process let's examine the various sections of the lab order screen



Section 1



In section 1 you can see that the patient name, DOB and contact information appear in the upper left corner of the screen. Just below the Patients information you will see a box that says **Lab/Vendor** and **Lab Contact**. In these boxes you will enter which lab you will be ordering your lenses through. Below that is a box labeled **Dispense Date**. At the time of dispense, you will enter a date in this box. To the right of the Dispense Date box you will see **Acct ID**. This will show your patients Crystal account ID.

You will also see at the top middle of this section, you have an **Order Date** box with buttons that will allow you to scroll through previous spectacle lab orders. The **Authorization** box allows you to enter insurance authorization numbers if your patient is using insurance for the spectacle lab order. The **Optician/Staff** box is where you will enter in the name of the person who is creating the spectacle lab order. The **Ordered/Ref#/Date** box is a box that can be used for other reference items pertinent to the spectacle lab order. The **Expected Date** box displays the date you expect the glasses to return from the lab. The **Status** box shows the current status of the spectacle order. The **Provider** box shows the Dr. who wrote the prescription.

At the top right hand side of section 1 you will see a number of buttons. The **Routing Slip** button allows you to access the routing slip to either add or view the products or services that are currently on the routing slip. The **New Order** button is used to create a new spectacle lab order. The **Edit** button allows you to edit spectacle lab orders. The **Remake** button is used when you need to remake an existing spectacle lab order. The **Print Order** button is used to print the spectacle lab order. The **Opt.** button gives you the option to decide what patient demographic information you want to print on the spectacle lab order. The **Dispense** button is used when you are ready to dispense the spectacle lab order. When this button is pressed it will automatically mark the status as dispensed and date stamp when the glasses are dispensed. The **DVI Remo** button is used if you have integrated DVI Remo with Crystal and wish to place your order through DVI Remo. The **View Log** button is used to view the history of the currently displayed order. The information provided will show creation dates and status updates. The **Save for VSP** button is used to save a VSP spectacle lab order to be attached to the next claim they file through the VSP claim window. The **Go to Billing Page** button is used to go directly to the billing page in Crystal.

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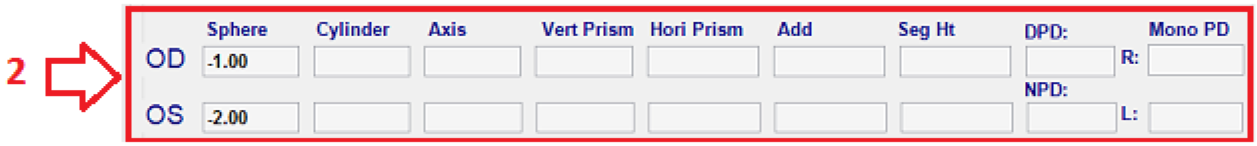
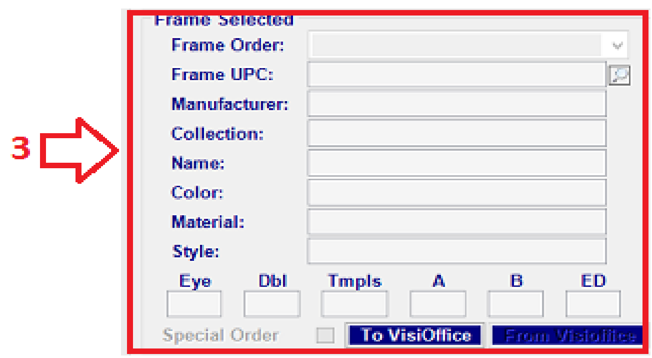
SECTION 2



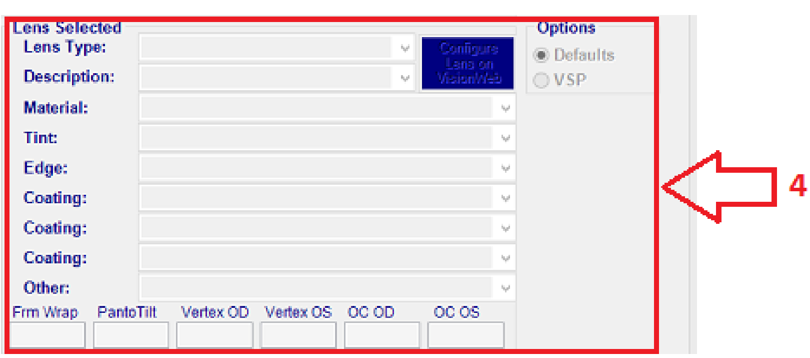
In section 2 you can see we have the prescription information. The prescription information will automatically populate in the Sphere, Cylinder, Axis, Add and Prism boxes when you press the New Order button. The optician will need to record the other necessary measurements required for the spectacle lab order to include Seg Ht and PDs. The DPD box is for your binocular distance PD. The NPD box is for your binocular near PD. In the Mono PD boxes I recommend that you put your monocular distance PD.

SECTION 3



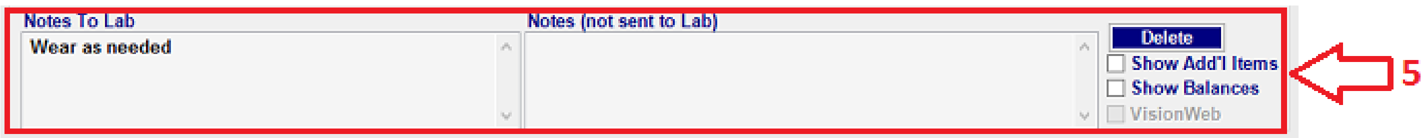
In section 3 you will enter in what kind of "frame order" this will be and information on the frame the patient will be using with this order. If you have entered your frame inventory in to Crystal then you can scan the bar code attached to your frame, or manually look in the inventory to pull the frame information across in the appropriate fields. If you linked your frame bill code to the Sale value in the Frame Page Defaults then the frame information will get added to the routing slip which we will discuss shortly. The **To VisiOffice** and **From VisiOffice** buttons allows you to send information and receive information from the VisiOffice equipment.

Section 4



In section 4 you will enter in the ophthalmic lenses and lens options your patient is needing. If you have linked bill codes to the various ophthalmic lenses and lens add-ons you provide in the Frames Page Defaults section as instructed earlier in this guide, then this will help facilitate the creation of the routing slip. We will discuss this when we cover the ordering process.

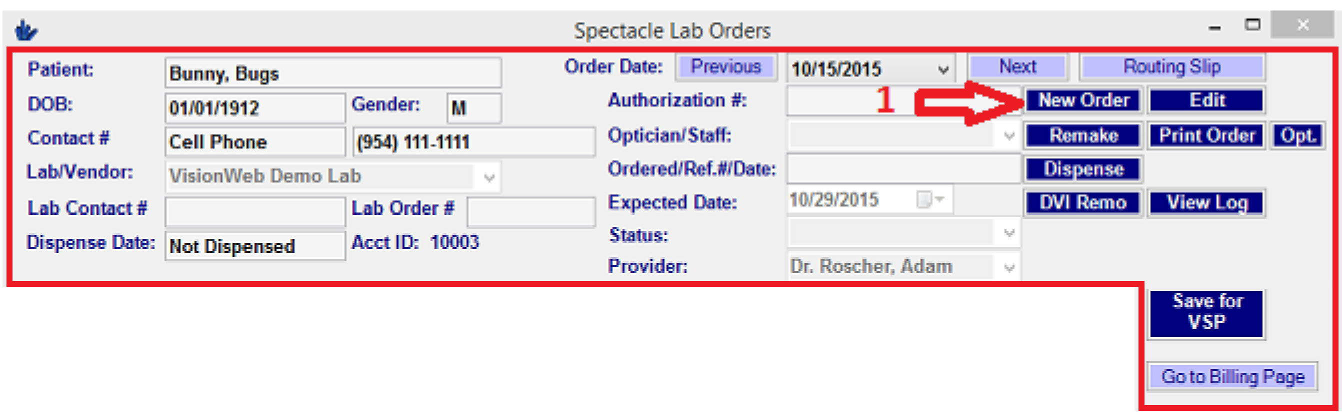
Section 5



Section 5 is where you enter in notes. You will notice that you have two separate notes boxes. When you type information in the Notes to Lab box, these notes will print out on the work order. The Notes (not sent to Lab) will not print out on the work order but will be viewable from the Spectacle Lab Order screen.

THE ORDERING PROCESS

To start the ordering process you will first need to press the button that says **New Order** (1) in the upper right corner of the spectacle lab order screen. Please refer to the example below.



After pressing the **New Order** button you will notice that all the fields that were grayed out are open and available to edit. You will also notice that the prescription will populate in the prescription boxes as long as there is a prescription listed in the Prescription tab of the Patient module.

At this point you will want to verify that the patient's information is correctly listed in the top left corner of the spectacle lab order screen. From there you will want to select which lab you will be ordering from. If this is a job that has insurance attached to it, you may want to enter in the authorization number in the Authorization # box. Under the Authorization box you will want to select the optician/staff who is creating the order. You will also need to set your expected date, status, and select the provider who wrote the prescription if the name is not already in the box.

Next you will need to take the appropriate measurements based on the prescription. Enter in PD and seg heights as required.

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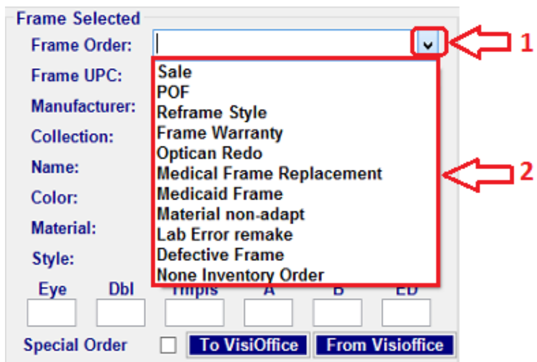
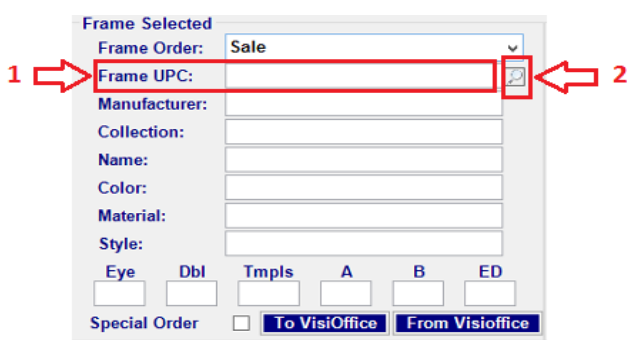
The next step is to enter the frame information. In the **Frame Selected** area, located underneath the prescription information, you will need to first select what kind of "frame order" this is. To do this, first click on the arrow in the right hand side of the Frame Order box (1). When you do that you will be presented with a list of options to select from (2)



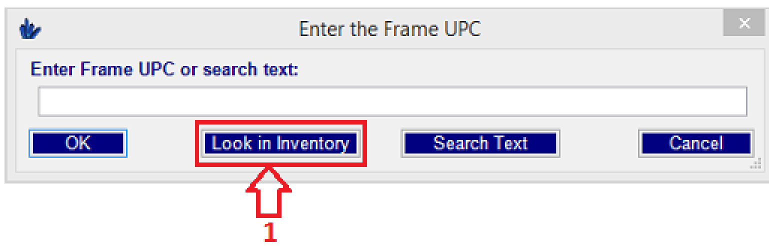
You will need to select the appropriate value based on what kind of frame order you are doing. In this example I will be doing a new sale and providing my patient a frame from the frame board, so I will select the value that says 'Sale'. When setting up the Frame page defaults in the Admin section, it was recommended to link your frame bill code to the value that coincides with a frame sale. This will be important if you want the frame price and frame information to show on the routing slip and transfer to the invoice.

Next, you will need to enter the frame information. If this is a POF then you will need to manually enter in the frame information. If you are not using a POF and have entered your frame inventory in to Crystal and are using barcodes or have the UPC listed on your frame tag then you can scan or manually enter in the UPC number in the box labeled **Frame UPC** (1) After the information has been entered in the Frame UPC box the rest of the frame information will populate in the corresponding fields. **This will only happen if you have entered your frame inventory in to Crystal.**

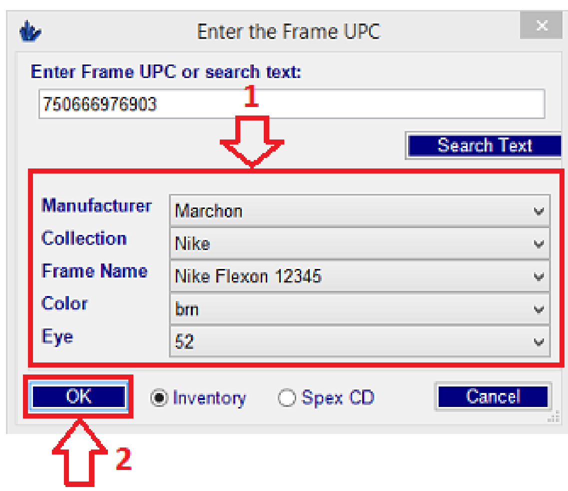


If you have entered your frame inventory in to Crystal and do not have the UPC or barcode listed on your frame tag then you will need to manually search the inventory. To do so you will need to press on the magnifying glass to the right of the **Frame UPC** box (2). Please refer to the example above

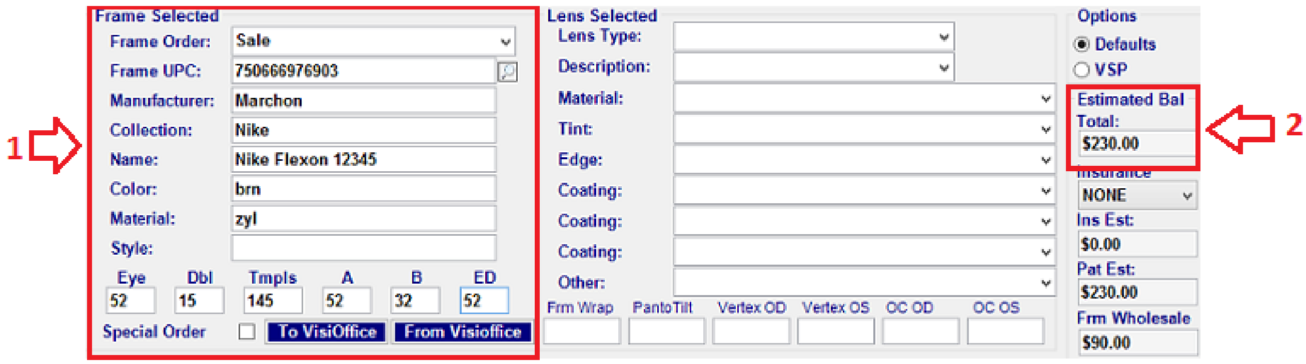
When you press on the magnifying glass located to the right of the Frame UPC box, a small rectangular window will open up allowing you to manually look in your inventory. In order to manually look in the inventory you will need to press the button that says **Look in Inventory** (1) refer to the example below.



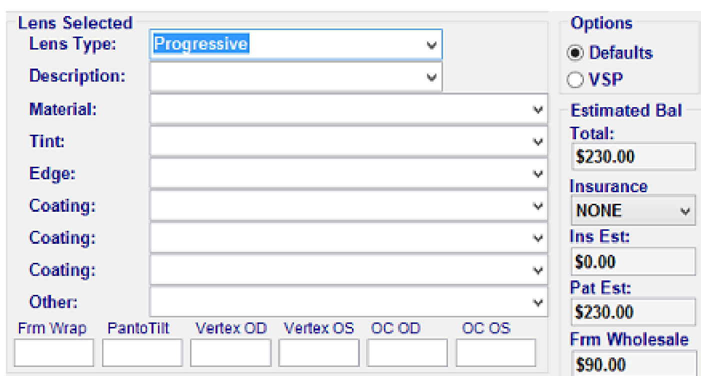
Once the **Look in Inventory** button has been pressed you will be presented with another window that will allow you to select the Manufacturer, Collection, Frame Name, Color and Eye (1) when you are done selecting the correct frame information press the **OK** button (2) at the bottom of the screen. Please refer to the example below.



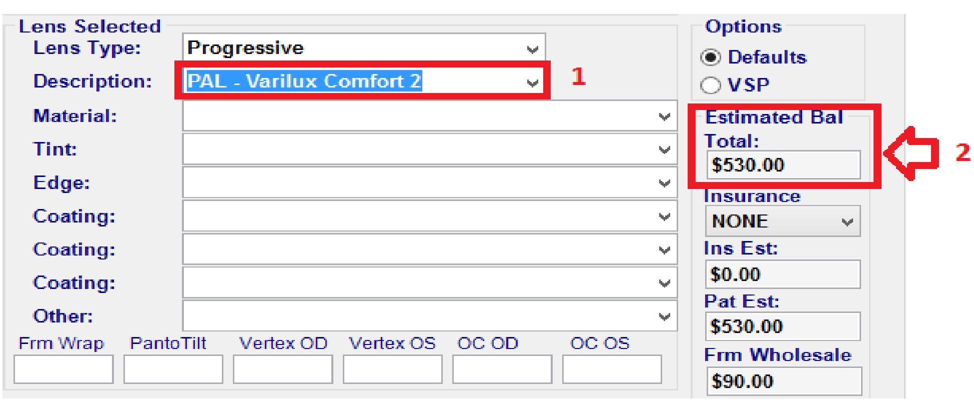
You'll notice below, that once you press the OK button, the frame information will transfer to the Frame Selected section on the Spectacle Lab Order screen (1). You will also notice that on the far right hand side of the Spectacle Lab Order screen the estimated balance went up (2). If the Estimated balance did not go up after selecting your inventory frame, then there is something wrong with either the way the bill code was set up or it was not attached to the value that coincides with a frame sale on the Frame Page Defaults in the Admin section of Crystal, OR the sale price was not entered for the frame in inventory.



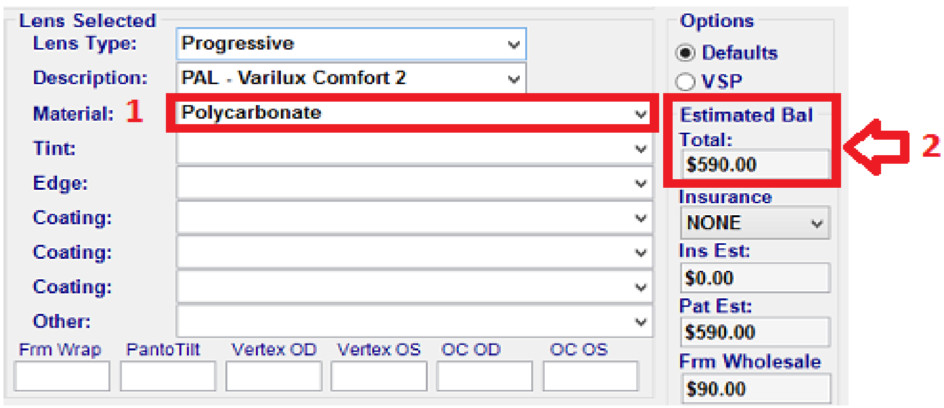
Now that you have selected the frame information, it is time to select the ophthalmic lens and lens options your patient is wanting. This information is entered on the **Lens Selected** section. First you will want to select the general type of lens style. This is done in the **Lens Type** field. In this example I want to provide my patient with a Varilux Comfort 2. So I will first start by selecting Progressive as my lens type.



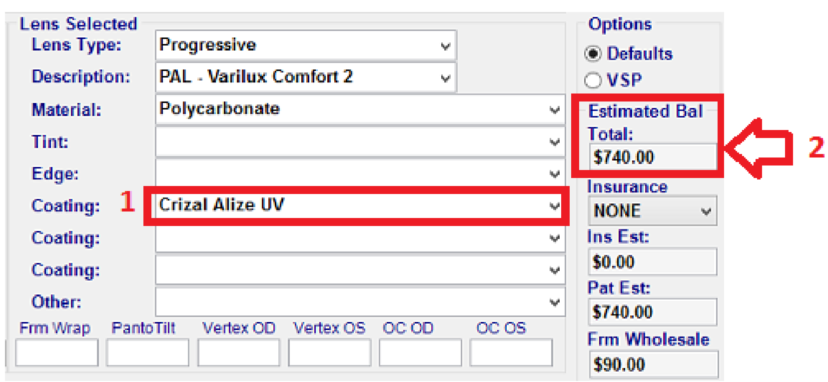
Now it's time to select the specific type of lens you want to provide your patient. In the **Description** field you will select the specific lens type. Again for this example I want to provide a Varilux Comfort 2 to my patient. In the example below, you can see that I have selected the Varilux Comfort 2 lens (1) you will also notice that the price went up from $230 to $530 in the **Estimated Balance** section (2). From here on out, every option you select should increase the price under the Estimated Balance section.



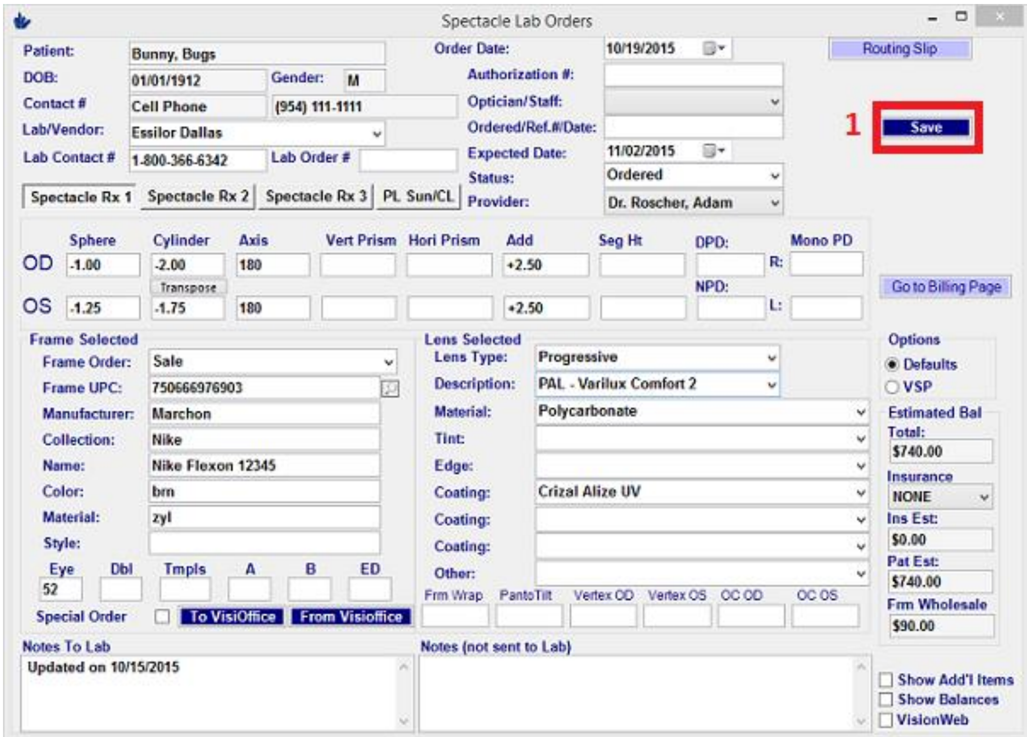
The next step is to choose the type of material you will be providing your patent. This is done in the **Material** field. For this example, I want to select Polycarbonate for the material. You will notice in the example below, in the material field, I put in the Polycarbonate material (1) and in turn that increased my estimated balance from $530 to $590 (2)



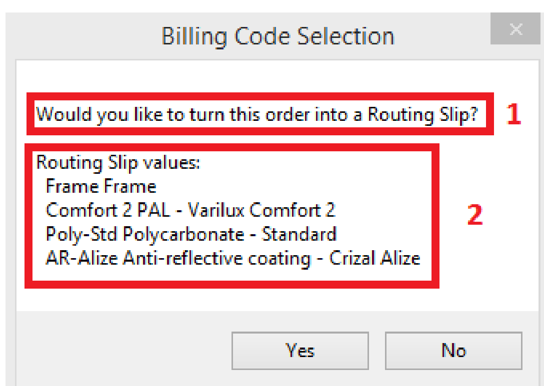
For this Example I will not add any tint or special edge treatment to the order. If I had selected a tint or edge treatment from the corresponding fields then the price would have gone up in the Estimated Balance field. I will however add a Crizal Alize to the lens order in the first **Coating** box. In the example below you will notice that when I add the Crizal Alize to the coating field (1) the price increases from $590 to $740 in the estimated balance field (2).



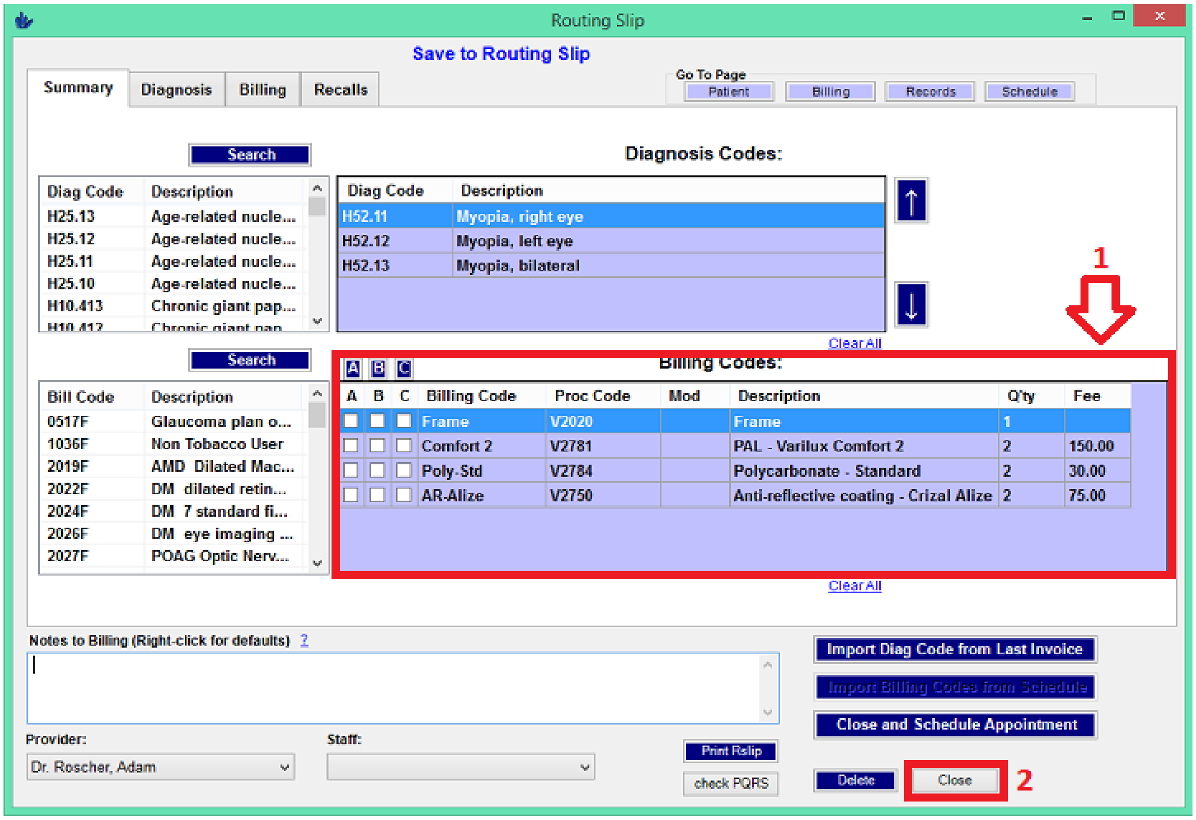
For this example I will now conclude the ordering process. So to review, this example patient is getting a Marchon Nike Flexon frame with Polycarbonate Varilux Comfort 2 lenses and a Crizal Alize coating. Before continuing make sure that all the necessary information has been filled in to the required fields. To proceed you will need to press the **Save** (1) button in the upper right corner of the Spectacle Lab order screen. See the example below.



Once you press on the save button you should see a small pop up window that says "Would you like to turn this order in to a Routing Slip" (1) Below that statement you will also see "Routing Slip Values" with a list of values that will be added to the Routing Slip (2). These values should coincide with the Frame, lenses and lens options that are on the spectacle lab order. In the example below you can see that everything from the order I created is listed under Routing Slip Values.



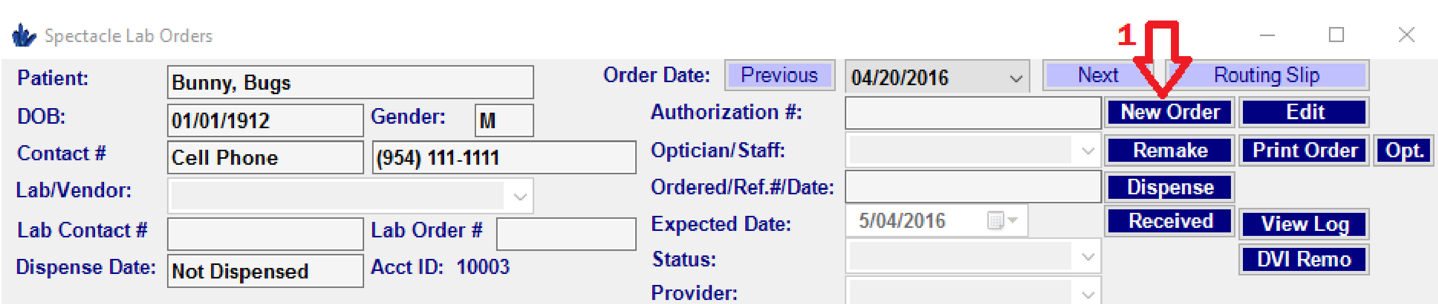
Once you have verified that everything from the spectacle lab order is listed correctly under Routing Slip Values you will want to press the Yes button. Pressing the Yes button will open the Routing Slip Window. In the example below you can see that everything from our spectacle lab order pulled over in to the Routing Slip (1).



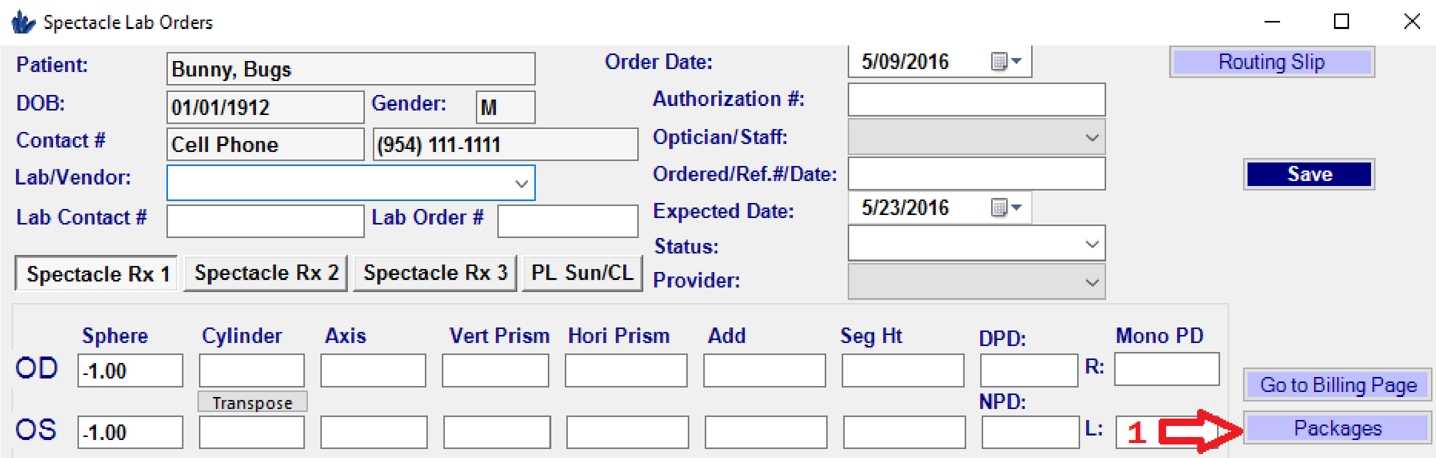
You will notice above that all of the lens and lens options pulled across with the pricing listed in the Fee column. You will also notice that the frame price has not pulled across. The price of the frame will not appear until after you turn this routing slip in to an invoice. Once you have verified that everything has made it from the spectacle lab order to the routing slip, all you have to do is press the Close button (2) at the bottom right corner of the screen. Once you press close on the Routing Slip the Routing slip will close. Now it is time to create the billing invoice for this spectacle lab order.

USING PACKAGES TO CREATE AN ORDER

Once the Spectacle Lab Order screen opens up, you will need to press the **New Order** button close to the top right of the screen (1).



Once that button has been pressed you will now be able to create your order. In order to select your ophthalmic lens package you will need to navigate to the right side of the Spectacle Lab order screen. You should see a light blue button that says **Packages** (1). You will need to press this button to select the package you wish to provide your patient.



Once you select the package you wish to provide your patient you will see the information now gets transferred to the Lens Selected area on the Spectacle lab order screen.

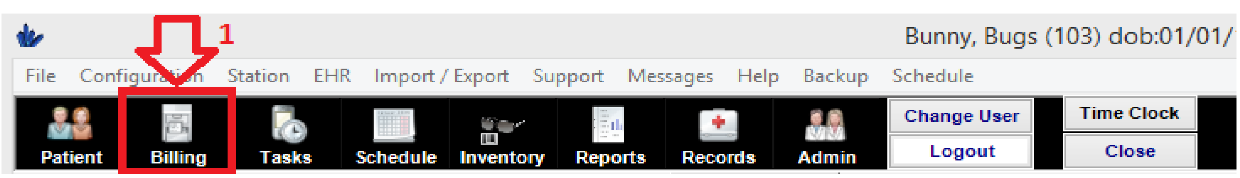
IF YOU HAVE SELECTED LENS OPTIONS PRIOR TO SELECTING YOUR PACKAGE THEN SELECTING THE PACKAGE MAY OVERWRITE PREVIOUSLY SELECTED OPTIONS DEPENDING ON IF THE OPTION TO **CLEAR ALL LENS OPTIONS** WAS SELECTED WHILE CREATING YOUR OPHTHALMIC LENS PACKAGE

At is point if you are supplying the frame for the patient then make sure you add the frame in the frame selected area on the spectacle lab order screen. When you are done press the save button close to the top right of the screen.

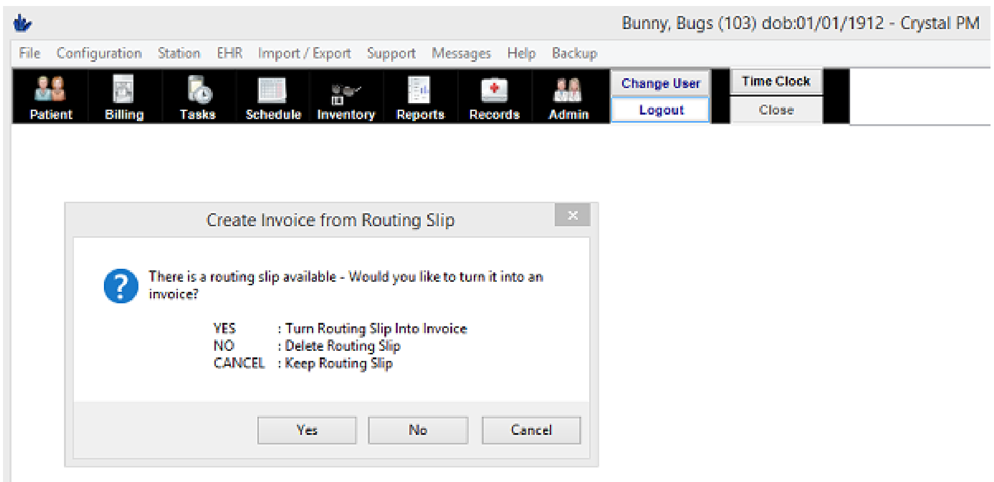
If you have set up your optical based on Crystal recommendations you should see a window open up asking if you want to turn the order in to a routing slip.

CREATING THE INVOICE WITHOUT INSURANCE

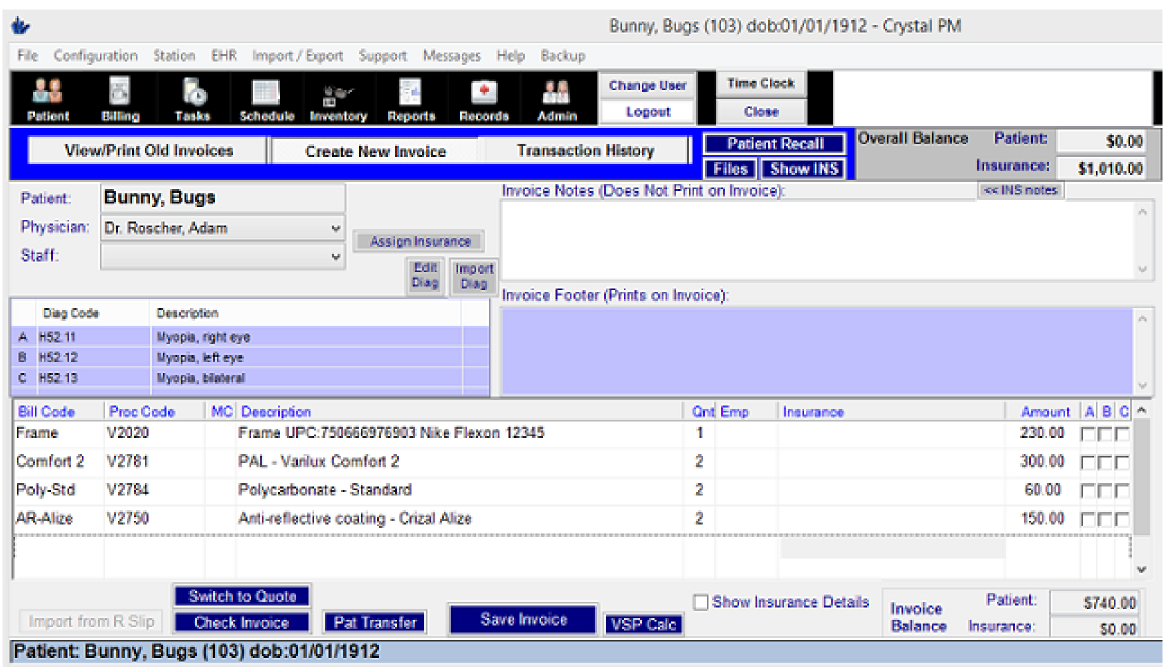
To start the invoice process you will want to navigate to the Billing module (1) at the top of Crystal. Please refer to the example below.



As soon as you press on the Billing module, a window will open up letting you know that there is a routing slip available and ask if you would like to turn this routing slip in to an invoice. Please refer to the example below.



From here you will want to press the **Yes** button. After you press the **Yes** Button the billing screen will open. In the billing screen you should see all of the options you chose for your patient when creating the order. Please refer to the example below.



Now that the charges are in the billing area of Crystal, it's time to make a determination if this is private pay or if the patient is using insurance. You will notice in the example below that as it stands now, our patient has a $740 balance (1). If the patient is not using insurance then you can press on the **Save Invoice** button (2)

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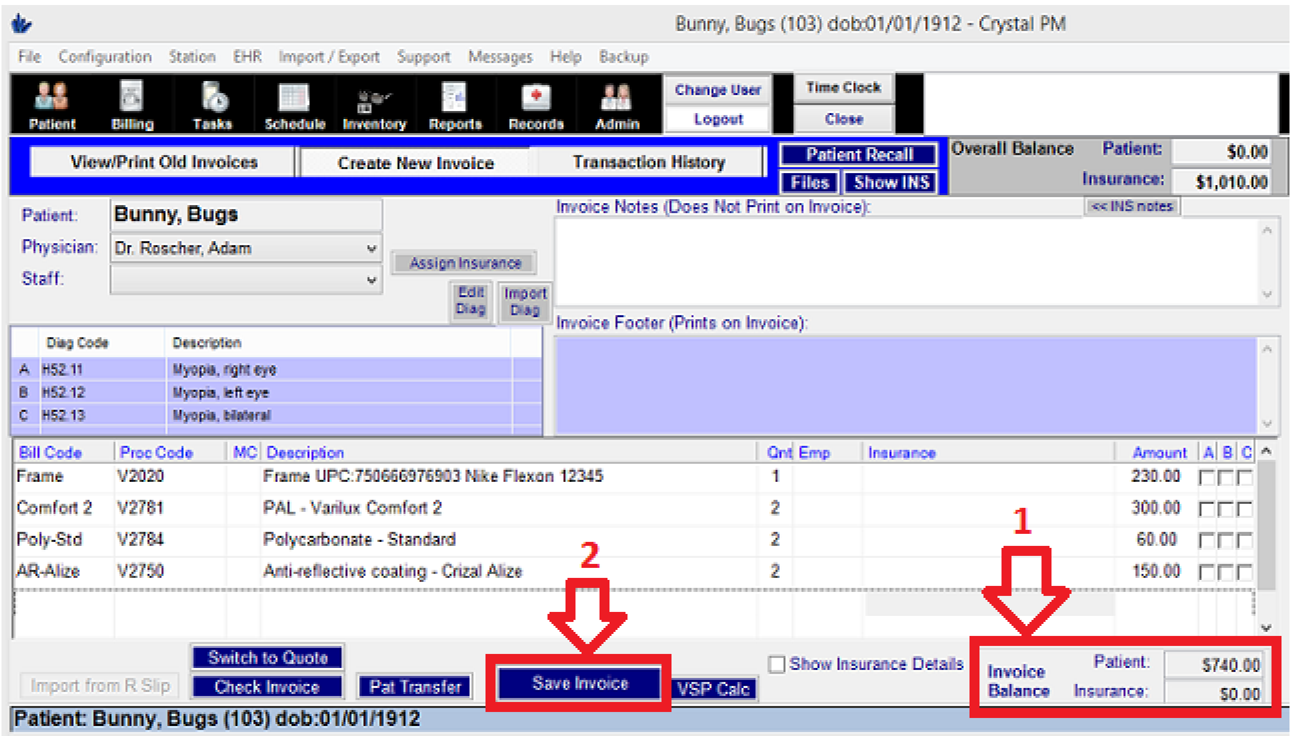
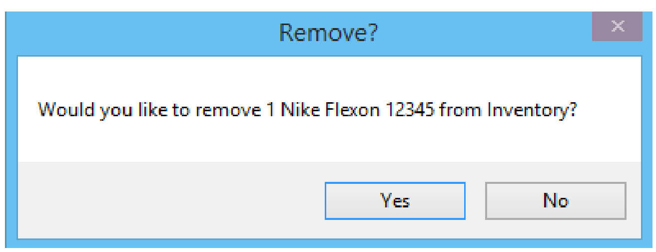
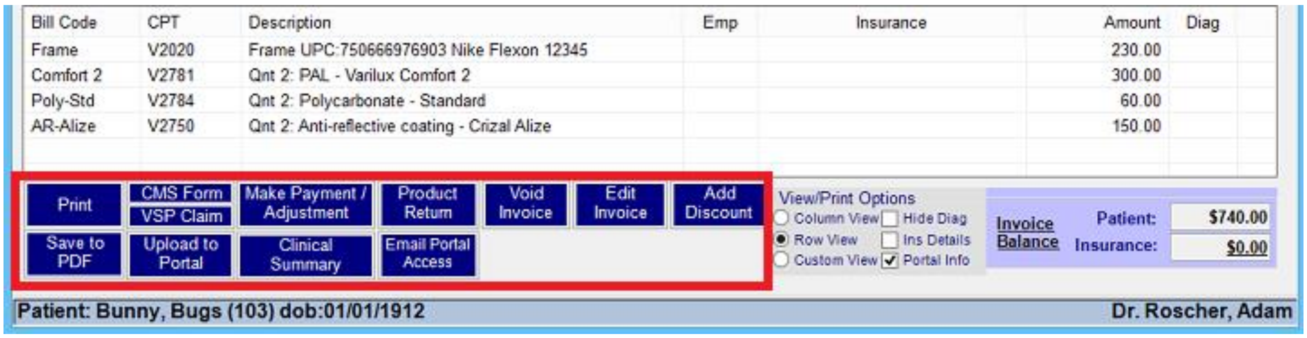


Once you press the **Save Invoice** button a small window will open asking if you want to remove the frame from inventory. If the frame was sold from your inventory then press the **Yes** button. If the Frame is being supplied by an outside source then press the No button.

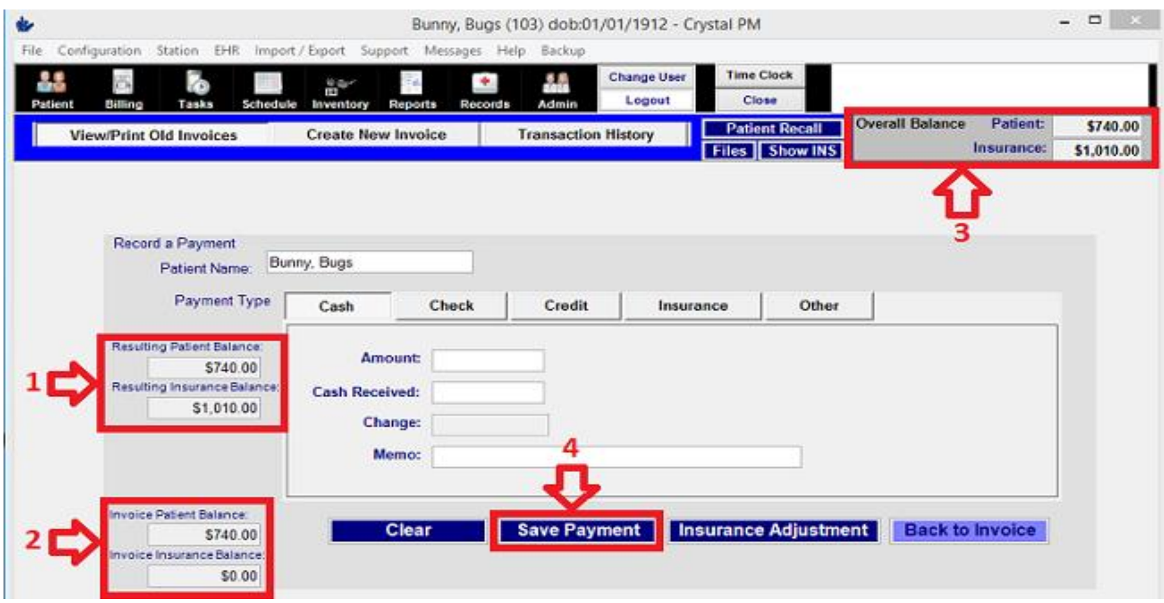


After you have made your decision on the frame, the billing page will save automatically then present you with a series of buttons across the bottom. As you can see in the example below you have a number of options you can take in regards to this invoice.

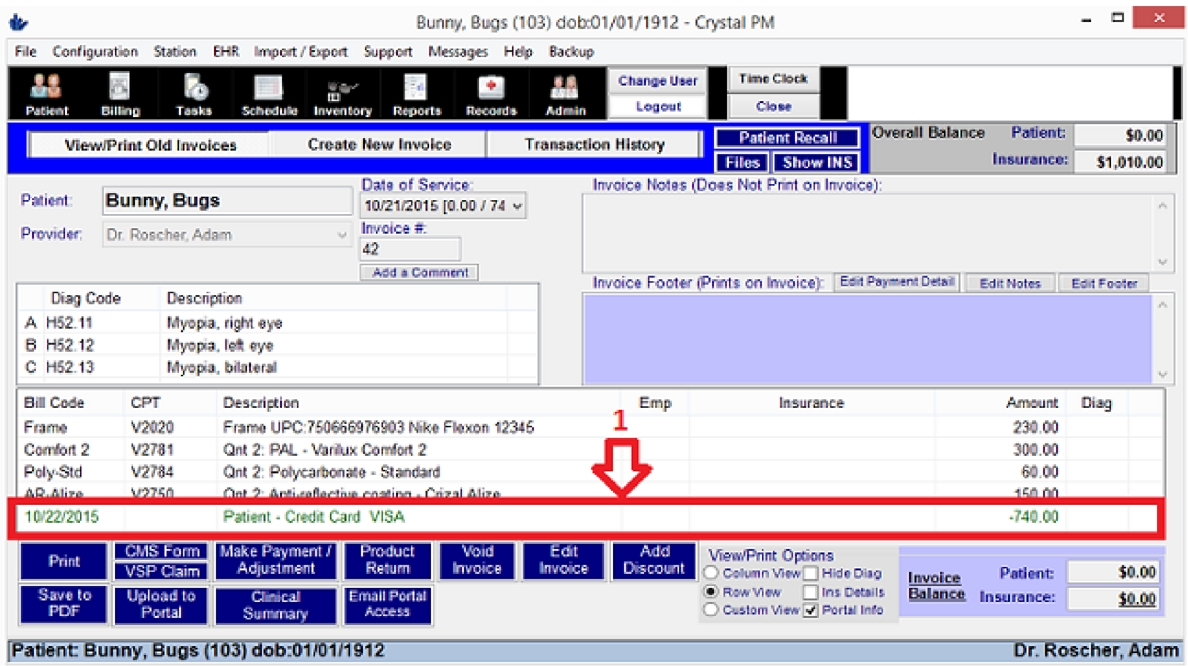


If you do not need to add discounts or edit the invoice before taking your patient's payment then you can press on the **Make Payment / Adjustment** button. If this invoice needs to be edited then you will need to press on the **Edit Invoice** button. If you need to add any discounts before taking the payment then you will need to press on the **Add Discount** button.

Once you press the **Make Payment / Adjustment** button, the payment screen will open up allowing you to take your patients payment. You will notice that the patients invoice total is located in the bottom left corner of the payment screen (2). Your patient's over all account balance is located above where the invoice balance is located (1) and at the upper right corner of the screen (3) please refer to the example below.



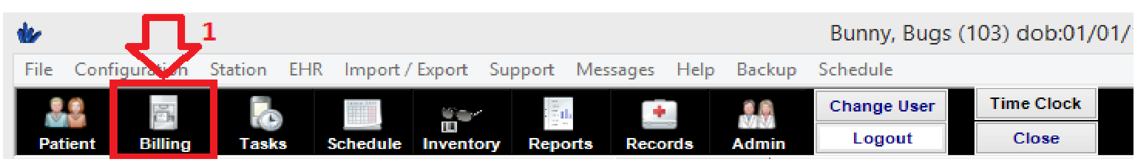
Once you have entered in your patient's payment you, will need to press the **Save Payment** button (4). After you press the **Save Payment** button you will be brought back to the invoice screen. In the example below you will notice that the payment is listed at the bottom of where the charges are (1)



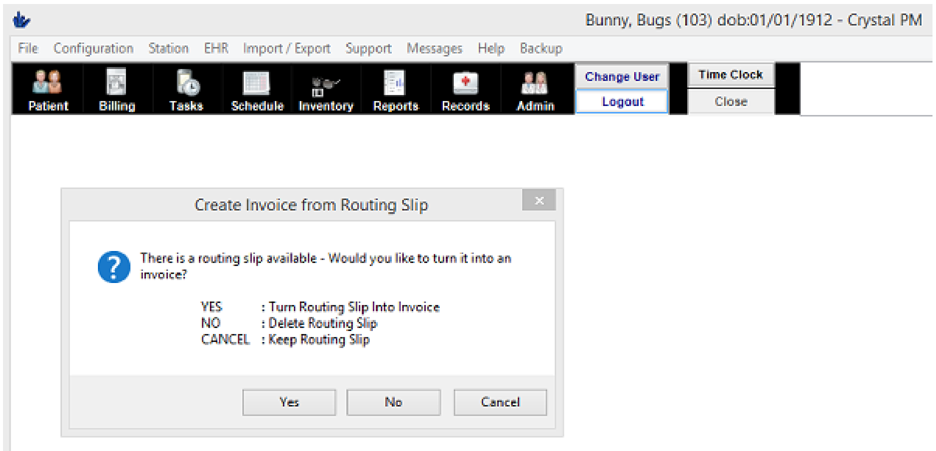
From here all you need to do at this point is print the invoice by pressing the **Print** button to compete your transaction with your patient.

CREATING THE INVOICE WITH INSURANCE

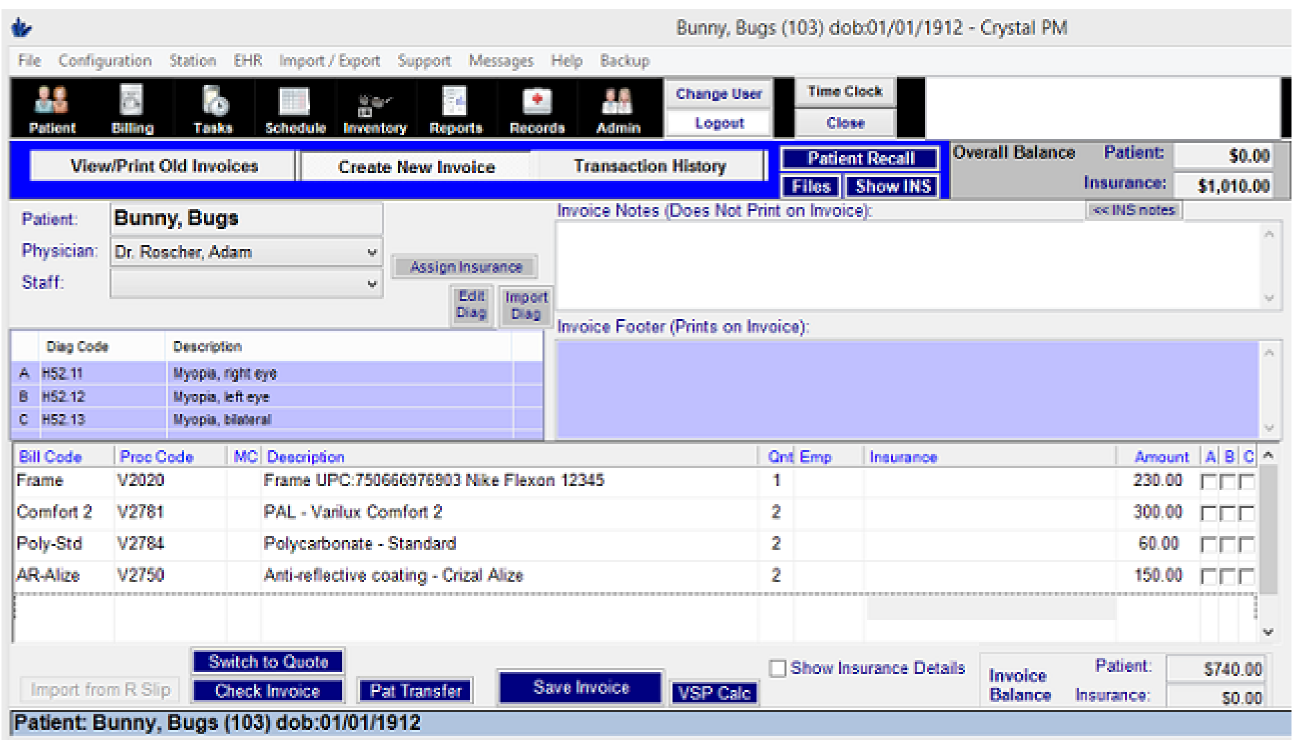
The overall process will be the same as described above. To start the invoice process you will want to navigate to the Billing module (1) at the top of Crystal. Please refer to the example below.



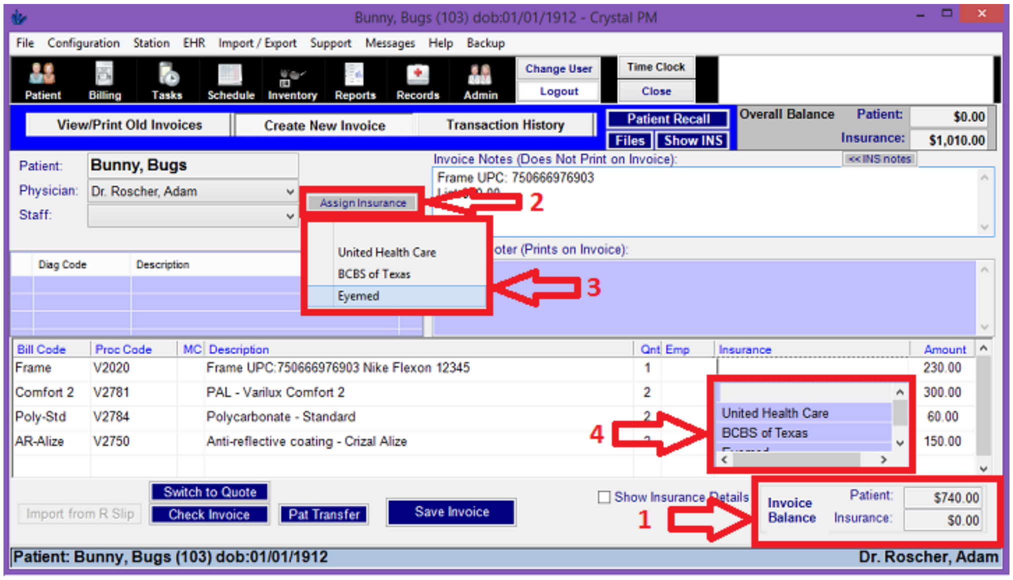
As soon as you press on the Billing module, a window will open up letting you know that there is a routing slip available and ask if you would like to turn this routing slip in to an invoice. Please refer to the example below.



From here you will want to press the Yes button. After you press the Yes Button the billing screen will open. In the billing screen you should see all of the options you chose for your patient when creating the order. Please refer to the example below.

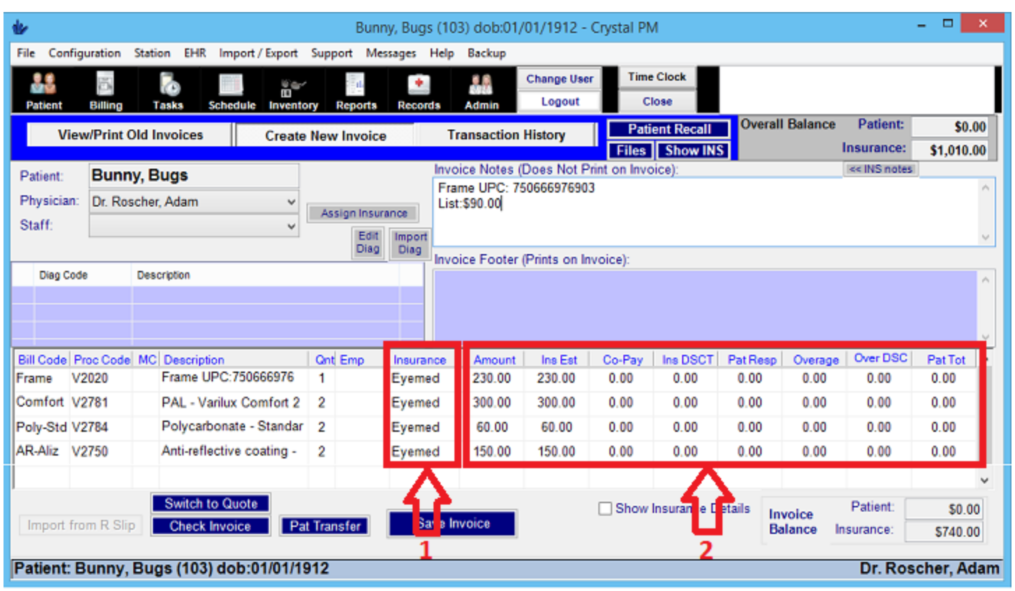


Now that the charges are in the billing area of Crystal, it’s time to assign the insurance to the line items. You will notice in the example below that as it stands now, our patient has a $740 balance with no balance on the insurance (1).



There are two methods to assign insurance to the line items in the invoice. The first method is by pressing on the **Assign Insurance** button (2). In the example above, pressing this button will open up a small window that will allow you to select which insurance you want to assign to all the line items in the invoice (3). The second method would be to go line by line and assign the insurance (4). This method is used if you need to assign multiple insurances on one invoice. For this example I will assign Eyemed to all of the line items.

In the example below, you will notice that I have assigned Eyemed to all of the line items (1). As you can see after we assign an insurance, the invoice screen automatically switches from a “standard” view as shown in the example above to a more “comprehensive” view (2) where you can assign what money the patient is responsible for and what the insurance will be responsible for.



Website
WWW.CRYSTALPM.COM

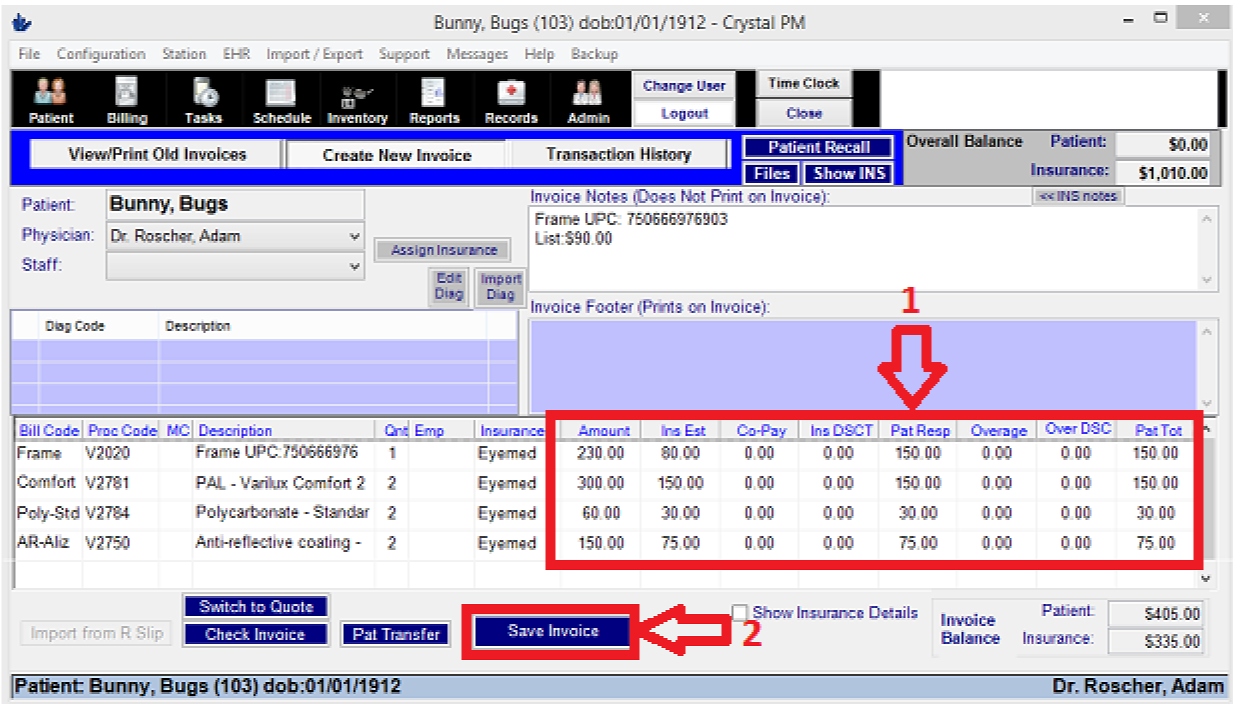
Forum
WWW.CRYSTALPM.PROBOARDS.COM

Crystal Practice Management

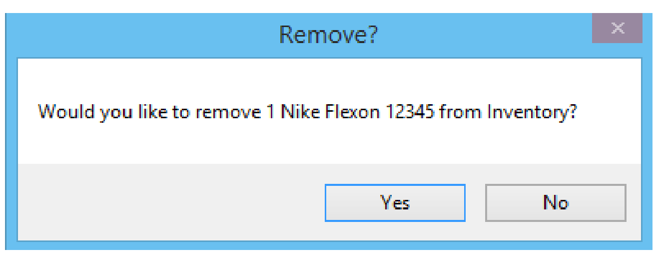
Phone
1-800-308-7169 Option 1

Email
support@crystalpm.com

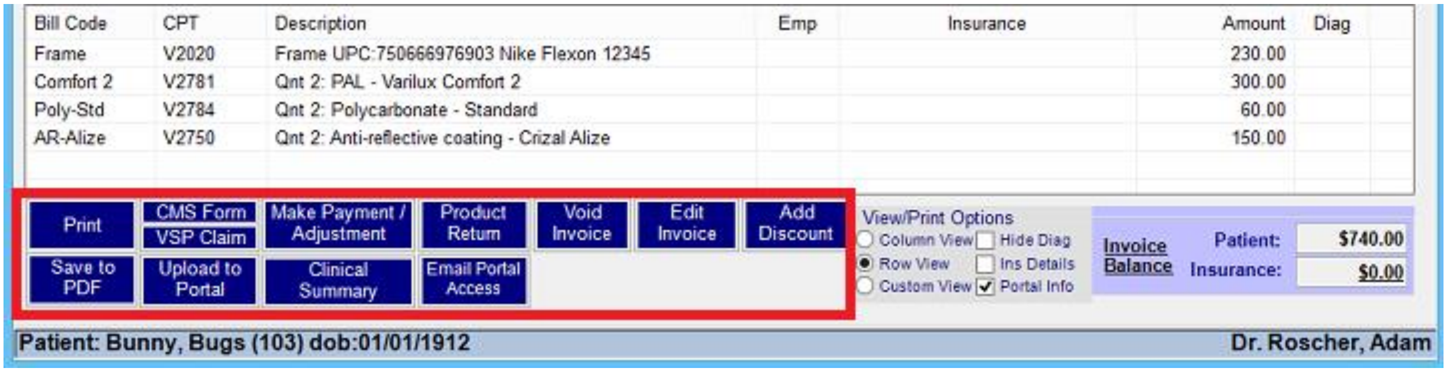
Once you have assigned the charges to the patient and the insurance as shown in the example below (1) proceed by pressing the **Save Invoice** button.



Once you press the **Save Invoice** button a small window will open asking if you want to remove the frame from inventory. If the frame was sold from your inventory then press the **Yes** button. If the frame is being supplied by an outside source then press the **No** button.

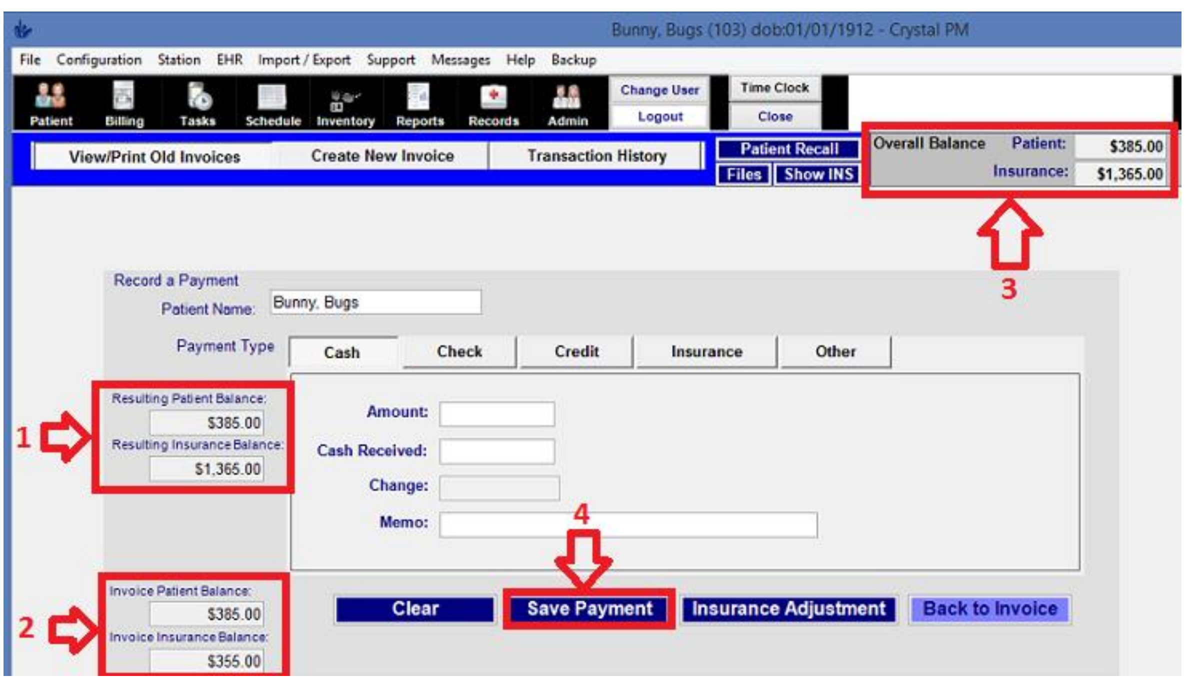


After you have made your decision on the frame, the billing page will save automatically then present you with a series of buttons across the bottom. As you can see in the example below you have a number of options you can take in regards to this invoice.



If you do not need to add discounts or edit the invoice before taking your patient's payment then you can press on the **Make Payment / Adjustment** button. If this invoice needs to be edited then you will need to press on the **Edit Invoice** button. If you need to add any discounts before taking the payment then you will need to press on the **Add Discount** button.

Once you press the **Make Payment / Adjustment** button, the payment screen will open up allowing you to take your patients payment. You will notice that the patients invoice total is located in the bottom left corner of the payment screen (2). Your patient's over all account balance is located above where the invoice balance is located (1) and at the upper right corner of the screen (3) please refer to the example below.



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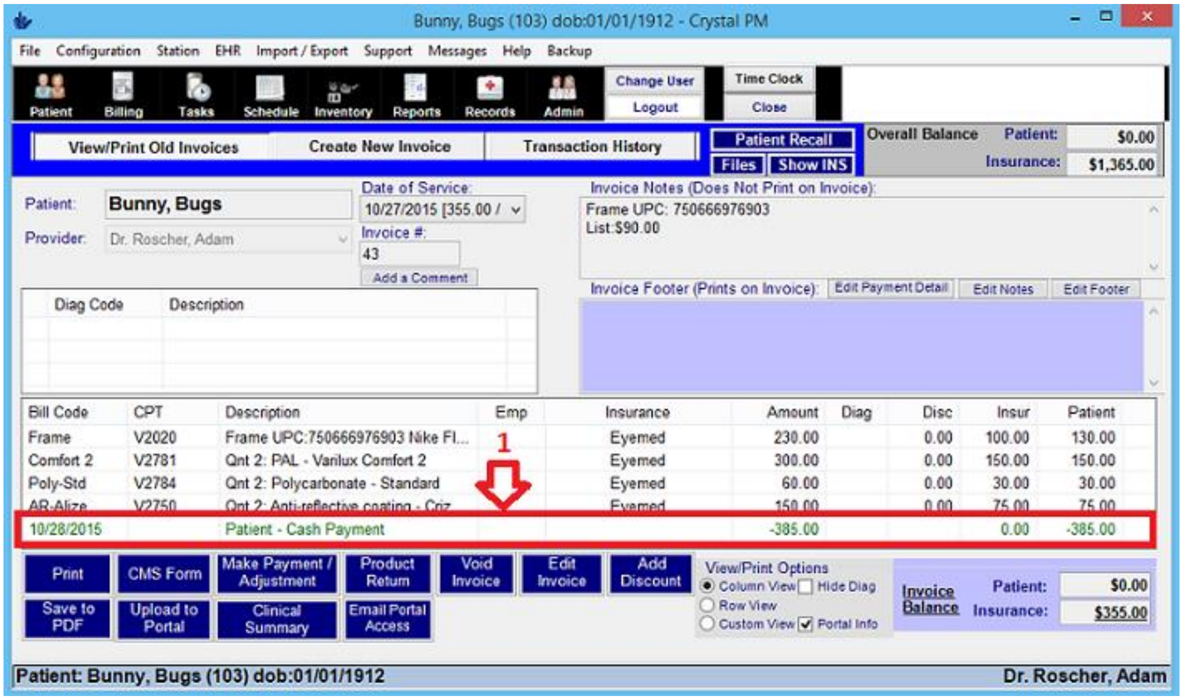

From here all you need to do at this point is print the invoice by pressing the **Print** button to compete your transaction with your patient. If this is an invoice/spectacle order that will be filed on a paper then you will need to make sure that you create the HICF/CMS claim form and print it out so it can be mailed to the appropriate insurance company.