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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'

The screenshot shows the 'Edit Billing Code' window with the following details:

- 1** Billing Code: Comfort 2
- 2** Description: PAL - Varilux Comfort 2
- 3** Quantity: 2
- 3** Sale Price (per 1 item): 150.00
- 4** Proc Code: V2781
- 5** Optician/Staff:
- 6** Category: Ophthalmic Lenses
- Place of Service: 11
- EMG (Emergency suggested 'Y' or 'N'):
- Cost / Purchase Price (per 1 item): 0.00

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

Bill Code	Proc Code	MO	Description	Qty	Emp	Insurance	Amount
Comfort 2	V2781		PAL - Varilux Comfort 2	2			300.00

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

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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

Billing	Bill Code	Proc ...	Q...	Ti...	Description	Category	Tax	O...	R...	Fu...	Fr...	M...
Company	82962	82962	1	0	Glucose, blood by glucose mo...	Professional Services	No	No	No	No	No	No
Computers	92020	92020	1	0	Gonioscopy (Separate Proced...	Professional Services	No	No	No	No	No	No
Credit Card	65820	65820	1	0	Goniotomy	Professional Services	No	No	No	No	No	No
Defaults	V2600	V2600	1	0	Hand held low vision aids and ...	NONE	No	No	No	No	No	No
Diag Codes	Hi Index 1.60	V2799	1	0	Hi Index - 1.60	Ophthalmic Lenses	No	Yes	No	No	No	No
E Claims	Hi Index 1.66/1.67	V2799	1	0	Hi Index - 1.66/1.67	Ophthalmic Lenses	No	Yes	No	No	No	No
E Prescribe	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.

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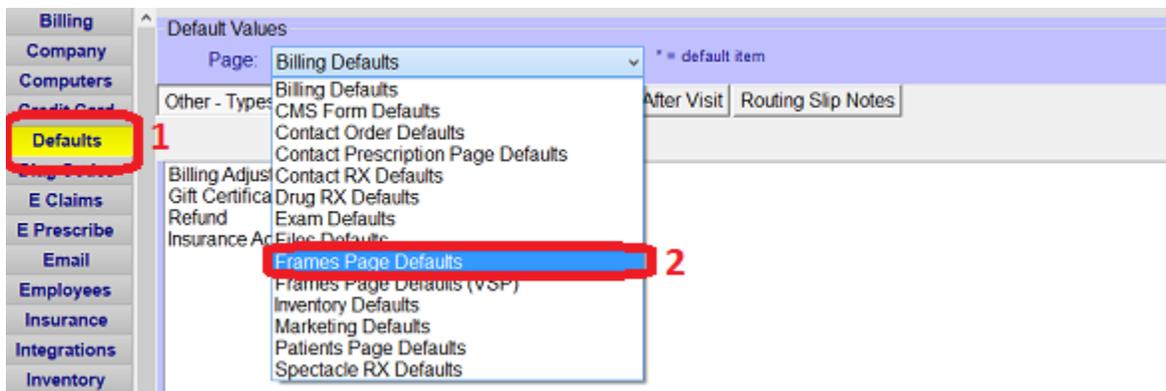


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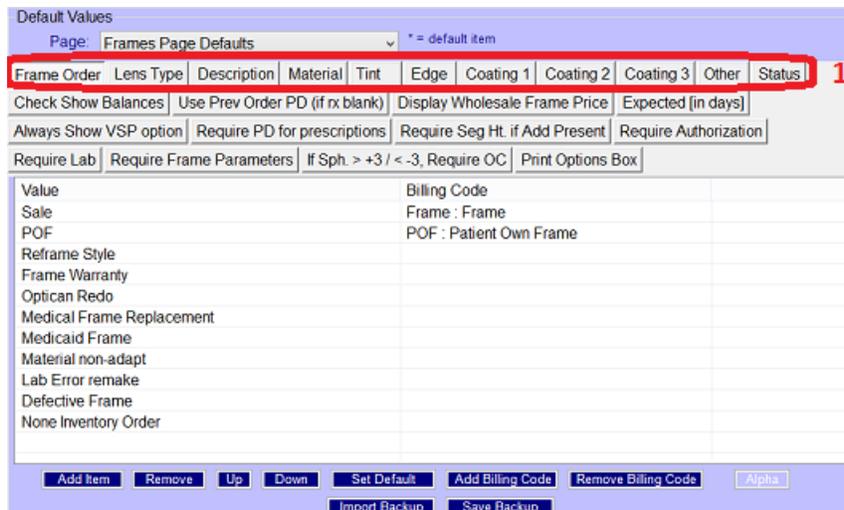
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## Frame Page Defaults

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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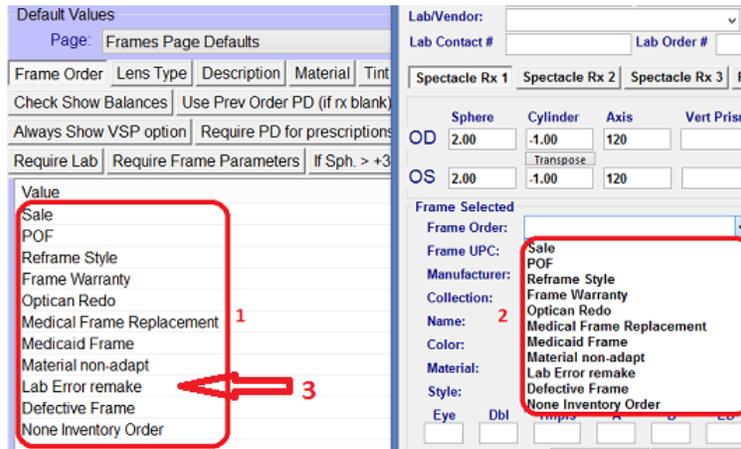


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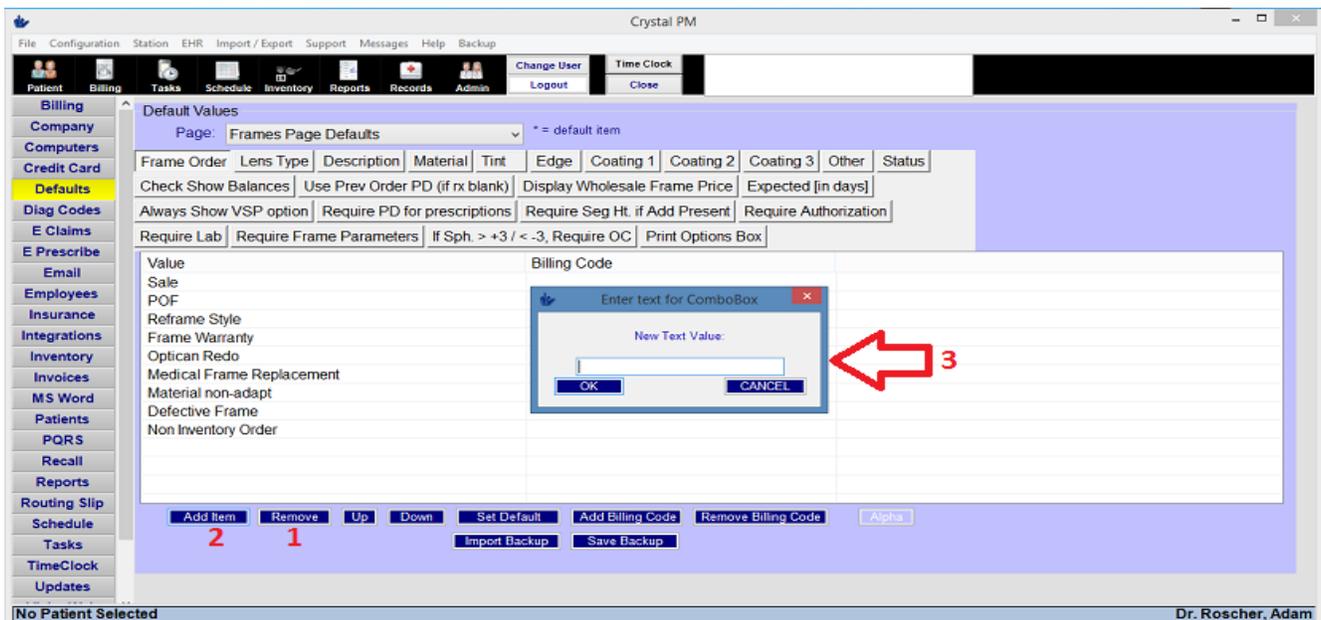
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## FRAME ORDER

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 considers 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.



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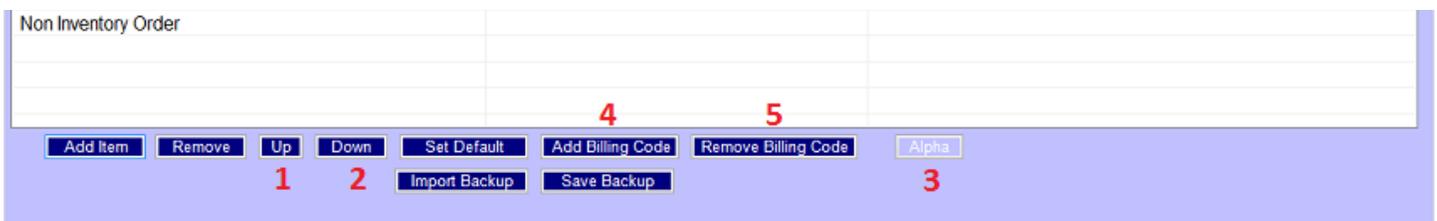


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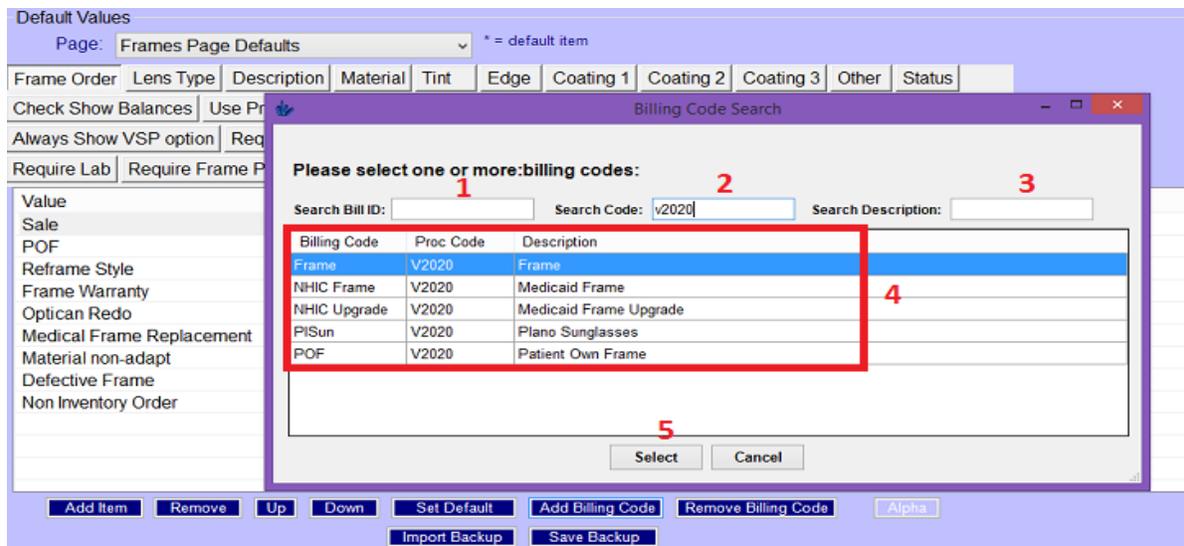
Once you press the 'Remove' button the 'Lab Error Remake' value will be deleted from the list. To add values to the Frame Order section press on the 'Add Item' button (2), please refer to the picture above. Once you click the 'Add Item' button, a small window will open allowing you to enter the new value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

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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 screenshot shows the "Default Values" page with a dropdown menu set to "Frames Page Defaults". Below the menu are several rows of buttons for various settings. At the bottom, there is a table with two columns: "Value" and "Billing Code". The "Billing Code" column contains the text "Frame : Frame" and is highlighted with a red arrow and the number "1".

Value	Billing Code
Sale	Frame : Frame
POF	
Reframe Style	
Frame Warranty	

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.

The screenshot shows the "Default Values" page with a dropdown menu set to "Frames Page Defaults". A red box highlights the "Frame Order" button in the first row of the settings grid.

## 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.

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Default Values

Page: **Frames Page Defaults** \* = default item

Frame Order	Lens Type	Description	Material	Tint	Edge	Coating 1	Coating 2	Coating 3	Other	Status
Check Show Balances	Use Prev Order PD (if rx blank)	Display Wholesale Frame Price	Expected [in days]							
Always Show VSP option	Require PD for prescriptions	Require Seg Ht. if Add Present	Require Authorization							
Require Lab	Require Frame Parameters	If Sph. > +3 / < -3, Require OC	Print Options Box							

Value	Billing Code
*	
Single Vision	SV-Plastic : SV Plastic Lenses
Bifocal	
Trifocal	
Progressive	
Near Variable Focus	
Specialty	

## 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).

Default Values

Page: **Frames Page Defaults** \* = default item

Frame Order	Lens Type	Description	Material	Tint	Edge	Coating 1	Coating 2	Coating 3	Other	Status
Check Show Balances	Use Prev Order PD (if rx blank)	Display Wholesale Frame Price	Expected [in days]							
Always Show VSP option	Require PD for prescriptions	Require Seg Ht. if Add Present	Require Authorization							
Require Lab	Require Frame Parameters	If Sph. > +3 / < -3, Require OC	Print Options Box							

Value	Billing Code	Linking
Bifocal - FT 28	BF-FT28 : Bifocal - FT28	
Bifocal - FT 35	BF-FT35 : Bifocal - FT35	
Bifocal - Executive	BF-Exec : Bifocal - Executive	
Bifocal - Blended Seg 22	BF-Blended : Bifocal - Blended	
Bifocal - Blended Seg 25	BF-Blended 25 : Bifocal - Blended Seg 25	
Bifocal - Blended Seg 28	BF-Blended 28 : Bifocal - Blended Seg 28	
Bifocal - Curve Top Seg 28	BF-Curve 28 : Bifocal - Curve Top 28	
Trifocal - 7x28	TF-7x28 : Trifocal - Flat Top 7x28	
PAL - Adapter	Adapter : PAL - Adapter	
PAL - Varilux Comfort 2	Comfort 2 : PAL - Varilux Comfort 2	
SV - Essilor Eyecode	SV-Essilor Eyecode : Essilor Eyecode (SV)	

Add Item Remove Up Down Set Default Add Billing Code Remove Billing Code Alpha

Import Backup Save Backup

Add Linking Help Linking

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.

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## 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.

The screenshot shows the "Default Values" section of the software interface. The "Page" is set to "Frames Page Defaults". The interface includes a table with columns for "Value", "Billing Code", and "Linking".

Value	Billing Code	Linking
Glass	Glass : Glass Lenses	
Glass Hi Index	Glass Hi-Index : Glass Hi-Index Lenses	
Mid Index	Mid Index : Mid Index Lenses	
Plastic	Plastic : Plastic Lenses	
Plastic Hi Index 1.60	Hi Index 1.60 : Hi Index - 1.60	
Plastic Hi Index 1.66/1.67	Hi Index 1.66/1.67 : Hi Index - 1.66/1.67	
Plastic Hi Index 1.70/1.71	Hi Index 1.70/1.71 : Hi Index 1.70/1.71	
Polycarbonate	Poly-Std : Polycarbonate - Standard	
Trivex	Trivex : Trivex	
ThinLite 1.74 CRZ ALIZE UV	Poly-Std : Polycarbonate - Standard	

Red boxes highlight the "Value" column (labeled 1) and the "Billing Code" column (labeled 2). The interface also includes buttons for "Add Item", "Remove", "Up", "Down", "Set Default", "Add Billing Code", "Remove Billing Code", "Alpha", "Import Backup", "Save Backup", "Add Linking", and "Help Linking".

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.

The screenshot shows the "Default Values" section of the software interface. The "Page" is set to "Frames Page Defaults". The interface includes a table with columns for "Value", "Billing Code", and "Linking".

Value	Billing Code	Linking
Plastic		
Polycarbonate SV	Poly SV : Polycarbonate SV Upgrade	
Polycarbonate MF	Poly MF : Polycarbonate MF Upgrade	
Polycarbonate PAL	Poly PAL : Polycarbonate PAL Upgrade	
Trivex SV	Trivex SV : Trivex SV Upgrade	
Trivex MF	Trivex MF : Trivex MF Upgrade	
Trivex PAL	Trivex PAL : Trivex PAL Upgrade	
Plastic Hi Index 1.60 SV	Hi Index 1.60 SV : Hi Index 1.60 SV Upgrade	
Plastic Hi Index 1.60 MF	Hi Index 1.60 MF : Hi Index 1.60 MF Upgrade	
Plastic Hi Index 1.60 PAL	Hi Index 1.60 PAL : Hi Index 1.60 PAL Upgrade	
Plastic Hi Index 1.66/1.67 SV	HiIndex 1.66/1.67 SV : Hi Index 1.66/1.67 SV Upgrade	
Plastic Hi Index 1.66/1.67 MF	HiIndex 1.66/1.67 MF : Hi Index 1.66/1.67 MF Upgrade	
Plastic Hi Index 1.66/1.67 PAL	HiIndex 1.66/1.67PAL : Hi Index 1.66/1.67 PAL Upgrade	

Red boxes highlight the "Value" column (labeled 1) and the "Billing Code" column (labeled 2). The interface also includes buttons for "Add Item", "Remove", "Up", "Down", "Set Default", "Add Billing Code", "Remove Billing Code", "Alpha", "Import Backup", "Save Backup", "Add Linking", and "Help Linking".

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## 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)

The screenshot shows the "Default Values" interface for "Frames Page Defaults". It features a table with columns for "Value", "Billing Code", and "Linking".

Value	Billing Code	Linking
Solid Grey 1	Tint-Solid : Tint - Solid	
Solid Grey 2	Tint-Solid : Tint - Solid	
Solid Grey 3	Tint-Solid : Tint - Solid	
Gradient Grey 1	Tint-Gradient : Tint - Gradient	
Gradient Grey 2	Tint-Gradient : Tint - Gradient	
Gradient Grey 3	Tint-Gradient : Tint - Gradient	
Solid Brown 1	Tint-Solid : Tint - Solid	
Solid Brown 2	Tint-Solid : Tint - Solid	
Solid Brown 3	Tint-Solid : Tint - Solid	
Gradient Brown 1	Tint-Gradient : Tint - Gradient	
Gradient Brown 2	Tint-Gradient : Tint - Gradient	
Gradient Brown 3	Tint-Gradient : Tint - Gradient	
Solid G-15 1	Tint-Solid : Tint - Solid	
Solid G-15 2	Tint-Solid : Tint - Solid	

Red boxes highlight the "Value" column (labeled 1) and the "Billing Code" column (labeled 2). The interface includes buttons for "Add Item", "Remove", "Up", "Down", "Set Default", "Add Billing Code", "Remove Billing Code", "Alpha", "Add Linking", "Help Linking", "Import Backup", and "Save Backup".

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)

The screenshot shows the "Default Values" interface for "Frames Page Defaults" in the Edge section. It features a table with columns for "Value", "Billing Code", and "Linking".

Value	Billing Code	Linking
High Luster Edge Polish	Polished : Polished Edges	
Painted Groove	Painted Groove : Painted Grooved Edge	
Roll and High Luster Polish	Roll & Polish : Rolled & Edge Polishing	
Standard Finish	Standard Finish : Standard Edge Finish	

Red boxes highlight the "Value" column (labeled 1) and the "Billing Code" column (labeled 2). The interface includes buttons for "Add Item", "Remove", "Up", "Down", "Set Default", "Add Billing Code", "Remove Billing Code", "Alpha", "Add Linking", "Help Linking", "Import Backup", and "Save Backup".

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### 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)

Value	Billing Code
Aura	AR-Aura : Anti-reflective coating - Aura
Carat	AR-Carat : Anti-reflective coating - Carat
Carat Advantage	AR-Carat Adv. : Anti-reflective coating - Carat Advantage
Carat Advantage Gold	AR-Carat Adv. Gold : Anti-reflective coating - Carat Advantage Gold
Carat Gold	AR-Carat Gold : Anti-reflective coating - Carat Gold
Claris	AR-Claris : Anti-reflective coating - Claris
Claris Plus	AR-Claris Plus : Anti-reflective coating - Claris Plus
Cobalt AR	AR-Cobalt : Anti-reflective coating - Cobalt
Cobalt Plus AR	AR-Cobalt Plus : Anti-reflective coating - Cobalt Plus
Crizal Alize UV	AR-Alize : Anti-reflective coating - Crizal Alize
Crizal Avance UV	AR-Avance : Anti-reflective coating - Crizal Avance
Crizal Easy UV	AR-Easy : Anti-reflective coating - Crizal Easy

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.

Value	Billing Code
Doctor Supplied UV	UV400 : UV-400 Protection
SRC - Factory Coated	SRC-Factory : Scratch Protection (Factory)
SRC - Foundation XT	SRC-Foundation : Scratch Protection (Foundation XT)
SRC - TD2	SRC-TD2 : Scratch Protection (TD2)
SRC - Tegra	SRC-Tegra : Scratch Protection (Tegra)
SRC - Unity HC	SRC-Unity HC : Scratch Protection (Unity HC)

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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.

A screenshot of a software interface for setting up frame page defaults. The interface has a light blue header with the text "Default Values" and a dropdown menu set to "Frames Page Defaults". Below the header is a grid of tabs for various settings: Frame Order, Lens Type, Description, Material, Tint, Edge, Coating 1, Coating 2, Coating 3, Other, Status, Check Show Balances, Use Prev Order PD (if rx blank), Display Wholesale Frame Price, Expected [in days], Always Show VSP option, Require PD for prescriptions, Require Seg Ht. if Add Present, Require Authorization, Require Lab, Require Frame Parameters, If Sph. > +3 / < -3, Require OC, and Print Options Box. The main area contains two columns: "Value" and "Billing Code". The "Value" column lists various lens types such as "PBX - Photo Brown Extra", "PGX - Photo Grey Extra", "Photochromic - Amber", "Photochromic - Brown", "Photochromic - ColorMatic Extra Grey", "Photochromic - Copper", "Photochromic - Grey", "Photochromic - LifeRX Brown", "Photochromic - LifeRX Grey", "Photochromic - Photo Fusion Brown", "Photochromic - Photo Fusion Grey", "Photochromic - Photo Gray Thin & Dark", "Photochromic - Photo Sun II", and "Photochromic - Photo View Brown". The "Billing Code" column lists corresponding codes like "Photo-PBX : Photochromic - Photo Brown Extra", "Photo-PGX : Photochromic - Photo Grey Extra", "Photochromic : Photochromic", "Photo-ColorMatic : Photochromic - ColorMatic Extra Grey", "Photochromic : Photochromic", "Photochromic : Photochromic", "Photo-LifeRX : Photochromic - LifeRX Brown/Grey", "Photo-LifeRX : Photochromic - LifeRX Brown/Grey", "Photo-PhotoFusion : Photochromic - Photo Fusion Brown/Grey", "Photo-PhotoFusion : Photochromic - Photo Fusion Brown/Grey", "Photo-Thin&Dark : Photochromic - Thin & Dark", "Photo-Photo Sun II : Photochromic - Photo Sun II", and "Photo-Photo View : Photochromic - Photo View (Brown/Grey)". Red boxes highlight the "Value" and "Billing Code" columns, with red numbers "1" and "2" placed next to them. At the bottom of the interface are several buttons: "Add Item", "Remove", "Up", "Down", "Set Default", "Add Billing Code", "Remove Billing Code", "Alpha", "Import Backup", "Save Backup", "Add Linking", and "Help Linking".

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)

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The screenshot shows the 'Default Values' section of the software interface. At the top, there is a dropdown menu for 'Page' set to 'Frames Page Defaults' and a note '\* = default item'. Below this is a grid of various options for frame orders, including 'Check Show Balances', 'Use Prev Order PD (if rx blank)', 'Display Wholesale Frame Price', 'Expected [in days]', 'Always Show VSP option', 'Require PD for prescriptions', 'Require Seg Ht. if Add Present', 'Require Authorization', 'Require Lab', 'Require Frame Parameters', 'If Sph. > +3 / < -3, Require OC', and 'Print Options Box'. The main area contains two columns: 'Value' and 'Billing Code'. A red box labeled '1' highlights the 'Value' column with entries: Custom Lens Shape, Custom Measurements, Custom Name Etching, Drill Mount, Overpower Lens > 6D Sph > 2D Cyl, Oversized Lens > 56 mm, Prism, and Slab Off. A red box labeled '2' highlights the 'Billing Code' column with corresponding entries: Custom Shape : Custom Lens Shape, Custom Measurements : Custom Lens Measurements, Name Etching : Custom Name Etching, Drill Mount : Drill Mounting, Overpower Lens : Overpowered Lens, Oversized Lens : Oversize lens, Prism : Prism, and Slab Off : Slab Off. At the bottom, there are buttons for 'Add Item', 'Remove', 'Up', 'Down', 'Set Default', 'Add Billing Code', 'Remove Billing Code', 'Alpha', 'Import Backup', 'Save Backup', 'Add Linking', and 'Help Linking'.

## 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.

The screenshot shows the 'Default Values' section of the software interface, focusing on the 'Status' column. The 'Page' dropdown is set to 'Frames Page Defaults' with the note '\* = default item'. The grid of options is the same as in the previous screenshot. The 'Value' column contains a list of status values: Created, Ordered, Received, Patient Called, Dispensed, and On Hold. The 'Billing Code' column is empty. At the bottom, there are buttons for 'Add Item', 'Remove', 'Up', 'Down', 'Set Default', 'Alpha', 'Import Backup', and 'Save Backup'.

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.

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## 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

The screenshot shows a software interface titled "Default Values" with a dropdown menu set to "Frames Page Defaults". Below the menu is a grid of options, each in a separate box. A red rectangle highlights the following options: "Check Show Balances", "Use Prev Order PD (if rx blank)", "Display Wholesale Frame Price", "Expected [in days]", "Always Show VSP option", "Require PD for prescriptions", "Require Seg Ht. if Add Present", and "Require Authorization". A red number "1" is placed to the right of the "Require Authorization" box. Below the grid is a list of status options: "Created", "Ordered", "Pending", "On Hold", "Received", "Patient Called", and "Dispensed". At the bottom are buttons for "Add Item", "Remove", "Up", "Down", "Set Default", "Alpha", "Import Backup", and "Save Backup".

**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.

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**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

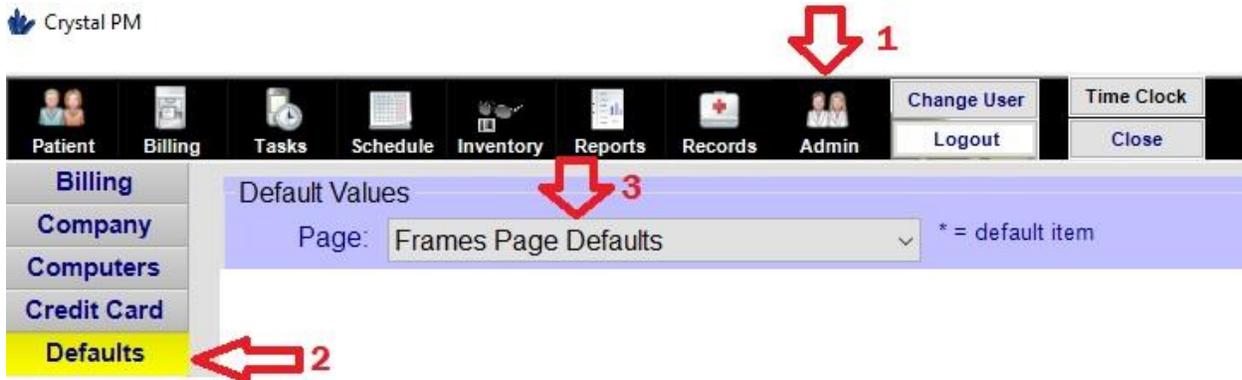
**Print Options Box** – Gives you the option to set whether or not you want to print out which ophthalmic lens options list you used: Either the VSP options list or the Frame Page Default options list.

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

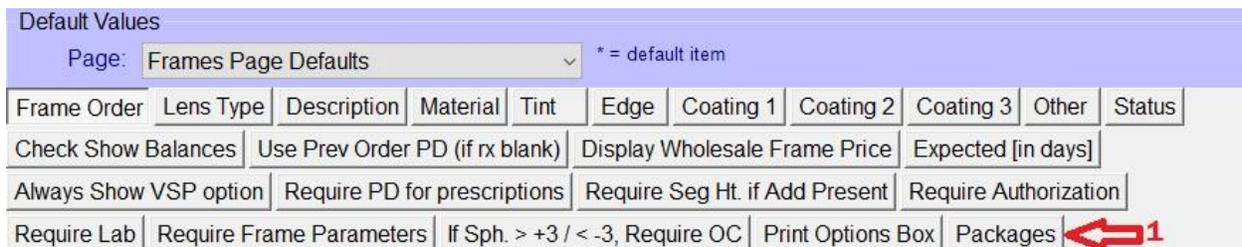
## How to Create Package Options in Frame Page Defaults.

**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).



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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).

A screenshot of a software interface. At the top, there's a section titled "Default Values" with a dropdown menu set to "Frames Page Defaults" and a note "\* = default item". Below this are several rows of checkboxes for various settings like "Frame Order", "Lens Type", "Material", "Tint", "Edge", "Coating 1", "Coating 2", "Coating 3", "Other", "Status", "Check Show Balances", "Use Prev Order PD (if rx blank)", "Display Wholesale Frame Price", "Expected [in days]", "Always Show VSP option", "Require PD for prescriptions", "Require Seg Ht. if Add Present", "Require Authorization", "Require Lab", "Require Frame Parameters", "If Sph. > +3 / < -3, Require OC", "Print Options Box", and "Packages". Below these is a table with columns "Value" and "Package Info". At the bottom, there are several buttons: "Add Item" (with a red arrow pointing to it and a "1"), "Remove", "Up", "Down", "Set Default", "Edit Item", "Alpha", "Import Backup", and "Save Backup".

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)

A small dialog box titled "Enter text for ComboBox" with a close button (X) in the top right corner. Inside the dialog, there is a label "New Text Value:" followed by a text input field. Below the input field are two buttons: "OK" and "CANCEL". A red arrow points to the "OK" button with a "1" next to it.

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).

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This screenshot shows the "Default Values" configuration window. At the top, there is a "Page:" dropdown menu set to "Frames Page Defaults" and a note "\* = default item". Below this are several rows of buttons for configuring various settings: "Frame Order", "Lens Type", "Description", "Material", "Tint", "Edge", "Coating 1", "Coating 2", "Coating 3", "Other", "Status", "Check Show Balances", "Use Prev Order PD (if rx blank)", "Display Wholesale Frame Price", "Expected [in days]", "Always Show VSP option", "Require PD for prescriptions", "Require Seg Ht. if Add Present", "Require Authorization", "Require Lab", "Require Frame Parameters", "If Sph. > +3 / < -3, Require OC", "Print Options Box", and "Packages". A table below these buttons has two columns: "Value" and "Package Info". The "Value" column contains the text "SV Poly Package", which is highlighted with a red arrow and the number "1". At the bottom of the window is a row of control buttons: "Add Item", "Remove", "Up", "Down", "Set Default", "Edit Item", "Alpha", "Import Backup", and "Save Backup". The "Edit Item" button is highlighted with a red arrow and the number "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.

This screenshot shows the "Package Defaults" window. It has a title bar with a hand icon and the text "Package Defaults". The window contains a "Lens Selected" section with several dropdown menus: "Lens Type:", "Description:", "Material:", "Tint:", "Edge:", "Coating:", "Coating:", "Coating:", and "Other:". Below these dropdowns is a checkbox labeled "Clear All Lens Other Options (can not be combined with other Packages)". At the bottom center of the window is a "SAVE" button.

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).

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A screenshot of a software dialog box titled "Package Defaults". It contains several dropdown menus for configuration: "Lens Type" (Single Vision), "Description" (SV - Single Vision), "Material" (Polycarbonate), "Edge" (Standard Finish), "Coating" (Crizal Easy UV), and "Other". There are also empty dropdown menus for "Tint", "Coating", and "Coating". At the bottom, there is a checkbox labeled "Clear All Lens Other Options (can not be combined with other Packages)" and a "SAVE" button. A red arrow labeled "1" points to the checkbox, and another red arrow labeled "2" points to the "SAVE" button.

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.

A screenshot of a software interface showing a table of "Default Values". The table has columns for "Value" and "Package Info". The first row shows "SV Poly Package" in the "Value" column and "<fa>Single Vision</f..." in the "Package Info" column. A red arrow labeled "1" points to the "Package Info" cell. Below the table are several buttons: "Add Item", "Remove", "Up", "Down", "Set Default", "Edit Item", "Alpha", "Import Backup", and "Save Backup".

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## 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 a la carte style setup for your package options. It is recommended to do a more a la 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	Qty	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

Switch to Quote     Show Insurance Details    Invoice Balance: \$700.00    Patient: \$0.00  
Import from R Slip    Check Invoice    Credit Transfer    Save Invoice    VSP Calc

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	Qty	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

Switch to Quote     Show Insurance Details    Invoice Balance: \$500.00    Patient: \$0.00  
Import from R Slip    Check Invoice    Credit Transfer    Save Invoice    VSP Calc

## 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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## Section 1

A screenshot of a web application window titled "Spectacle Lab Orders". The form is divided into several sections. On the left, there are input fields for Patient information: "Patient:" (Bunny, Bugs), "DOB:" (01/01/1912), "Gender:" (M), "Contact #:" (Cell Phone, (954) 111-1111), "Lab/Vendor:" (VisionWeb Demo Lab), "Lab Contact #:", "Lab Order #:", "Dispense Date:" (Not Dispensed), and "Acct ID:" (10003). In the middle, there are fields for "Order Date:" (10/15/2015), "Authorization #:", "Optician/Staff:", "Ordered/Ref./Date:", "Expected Date:" (10/29/2015), "Status:", and "Provider:" (Dr. Roscher, Adam). On the right, there are several buttons: "Previous", "Next", "Routing Slip", "New Order", "Edit", "Remake", "Print Order", "Opt.", "Dispense", "DVI Remo", and "View Log". At the bottom right, there are two more buttons: "Save for VSP" and "Go to Billing Page". A red box highlights the entire form area, and a red arrow points to the right side of the box with the number "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

2 →

	Sphere	Cylinder	Axis	Vert Prism	Hori Prism	Add	Seg Ht	DPD:	Mono PD
OD	-1.00							R:	
OS	-2.00							NPD:	L:

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

3 →

Frame Selected					
Frame Order:	<input type="text"/>				
Frame UPC:	<input type="text"/>				
Manufacturer:	<input type="text"/>				
Collection:	<input type="text"/>				
Name:	<input type="text"/>				
Color:	<input type="text"/>				
Material:	<input type="text"/>				
Style:	<input type="text"/>				
Eye	Dbi	Tmpls	A	B	ED
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Special Order	<input type="checkbox"/>	To VisiOffice	From VisiOffice		

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

4 →

Lens Selected		Options			
Lens Type:	<input type="text"/>	<input checked="" type="radio"/> Defaults	<input type="radio"/> VSP		
Description:	<input type="text"/>				
Material:	<input type="text"/>				
Tint:	<input type="text"/>				
Edge:	<input type="text"/>				
Coating:	<input type="text"/>				
Coating:	<input type="text"/>				
Coating:	<input type="text"/>				
Other:	<input type="text"/>				
Frm Wrap	PantoTilt	Vertex OD	Vertex OS	OC OD	OC OS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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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

A screenshot of a software interface showing two text input boxes for notes. The left box is titled "Notes To Lab" and contains the text "Wear as needed". The right box is titled "Notes (not sent to Lab)" and is empty. To the right of these boxes is a vertical menu with a "Delete" button at the top, followed by three checkboxes: "Show Add'l Items", "Show Balances", and "VisionWeb". A red arrow points from the right side of the image towards the "Show Add'l Items" checkbox, with the number "5" next to it.

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.

A screenshot of the "Spectacle Lab Orders" window. The window title is "Spectacle Lab Orders". It contains several fields for patient and order information. A red box highlights the "New Order" button in the upper right corner, with a red arrow pointing to it and the number "1" next to it. Other buttons visible include "Edit", "Remake", "Print Order", "Opt.", "Dispense", "DVI Remo", "View Log", "Save for VSP", and "Go to Billing Page". The patient information includes: Patient: Bunny, Bugs; DOB: 01/01/1912; Gender: M; Contact #: Cell Phone (954) 111-1111; Lab/Vendor: VisionWeb Demo Lab; Lab Contact #: ; Lab Order #: ; Dispense Date: Not Dispensed; Acct ID: 10003; Order Date: Previous 10/15/2015; Authorization #: ; Optician/Staff: ; Ordered/Ref./Date: ; Expected Date: 10/29/2015; Status: ; Provider: Dr. Roscher, Adam.

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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	Sphere	Cylinder	Axis	Vert Prism	Hori Prism	Add	Seg Ht	DPD:	Mono PD
OD	-1.00	-2.00	180			+2.50			R: <input type="text"/>
		<input type="button" value="Transpose"/>						NPD:	
OS	-1.25	-1.75	180			+2.50			L: <input type="text"/>

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)

A screenshot of the "Frame Selected" form. The "Frame Order:" dropdown menu is open, showing a list of options: Sale, POF, Reframe Style, Frame Warranty, Optican Redo, Medical Frame Replacement, Medicaid Frame, Material non-adapt, Lab Error remake, Defective Frame, and None Inventory Order. Red arrows labeled "1" and "2" point to the dropdown arrow and the list of options, respectively. Other fields like "Frame UPC:", "Manufacturer:", "Collection:", "Name:", "Color:", "Material:", and "Style:" are visible but empty. At the bottom, there are checkboxes for "Eye", "Dbl", "Tmpls", "A", "B", and "ED", and buttons for "To VisioOffice" and "From VisioOffice".

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.**

A screenshot of the "Frame Selected" form. The "Frame Order:" dropdown menu is now set to "Sale". The "Frame UPC:" field is highlighted with a red box and a red arrow labeled "1". A magnifying glass icon is visible to the right of the "Frame UPC:" field, with a red arrow labeled "2" pointing to it. The other fields in the form are empty. At the bottom, there are checkboxes for "Eye", "Dbl", "Tmpls", "A", "B", and "ED", and buttons for "To VisioOffice" and "From VisioOffice".

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

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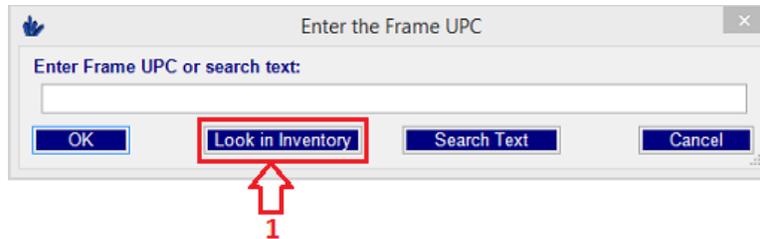
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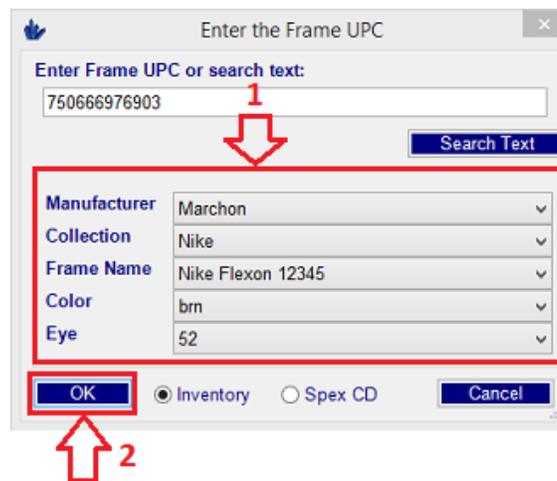
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When you press on the magnifying glass located to the right of the Frame UPC box, a small rectangular window will open up allowing you to manually look in your inventory. In order to manually look in the inventory you will need to press the button 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.

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The screenshot shows the software interface with the "Frame Selected" section highlighted by a red box and an arrow labeled "1". This section includes fields for Frame Order (Sale), Frame UPC (750666976903), Manufacturer (Marchon), Collection (Nike), Name (Nike Flexon 12345), Color (brn), and Material (zyl). Below these are input fields for Eye (52), Dbl (15), TmpIs (145), A (52), B (32), and ED (52). There are also checkboxes for "Special Order" and buttons for "To VisiOffice" and "From VisiOffice". To the right, the "Lens Selected" section is partially visible, and the "Options" section shows "Estimated Bal Total" at \$230.00, highlighted by a red box and an arrow labeled "2".

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.

This screenshot shows the "Lens Selected" section of the software. The "Lens Type" dropdown menu is set to "Progressive". Other fields like Description, Material, Tint, Edge, Coating, and Other are currently empty. The "Options" section on the right shows the "Estimated Bal Total" at \$230.00.

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.

This screenshot shows the "Lens Selected" section with the "Description" dropdown menu set to "PAL - Varilux Comfort 2", highlighted by a red box and an arrow labeled "1". The "Options" section on the right shows the "Estimated Bal Total" updated to \$530.00, highlighted by a red box and an arrow labeled "2".

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The next step is to choose the type of material you will be providing your patient. 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)

A screenshot of a software interface for ordering eyeglasses. The "Lens Selected" section shows "Lens Type: Progressive" and "Description: PAL - Varilux Comfort 2". The "Material:" dropdown menu is highlighted with a red box and labeled with a red "1", showing "Polycarbonate" selected. To the right, the "Options" section shows "Estimated Bal Total:" with a value of "\$590.00", which is also highlighted with a red box and labeled with a red "2". Other fields include "Insurance: NONE", "Ins Est: \$0.00", "Pat Est: \$590.00", and "Frm Wholesale \$90.00".

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).

A screenshot of the same software interface. The "Material:" field remains "Polycarbonate". The first "Coating:" dropdown menu is highlighted with a red box and labeled with a red "1", showing "Crizal Alize UV" selected. The "Estimated Bal Total:" field in the "Options" section is now "\$740.00", highlighted with a red box and labeled with a red "2". The "Pat Est:" field has also updated to "\$740.00".

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.

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A screenshot of the "Spectacle Lab Orders" software interface. The window title is "Spectacle Lab Orders". It contains various input fields for patient information (Bunny, Bugs), contact info, and order details (Order Date: 10/19/2015, Provider: Dr. Roscher, Adam). A "Save" button is highlighted with a red box and a red "1" next to it. Below the patient info is a table for lens specifications (Sphere, Cylinder, Axis, etc.) for OD and OS. There are also sections for "Frame Selected" (Sale, Nike Flexon 12345) and "Lens Selected" (Progressive, PAL - Varilux Comfort 2). On the right side, there are "Options" (Defaults, VSP) and "Estimated Bal" (Total: \$740.00). A "Go to Billing Page" button is also visible.

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.

A screenshot of a "Billing Code Selection" pop-up window. The window title is "Billing Code Selection". It contains a question: "Would you like to turn this order into a Routing Slip?" with a red box around it and a red "1" next to it. Below the question is a list of "Routing Slip values": "Frame Frame", "Comfort 2 PAL - Varilux Comfort 2", "Poly-Std Polycarbonate - Standard", and "AR-Alize Anti-reflective coating - Crizal Alize". This list is also enclosed in a red box with a red "2" next to it. At the bottom of the window are "Yes" and "No" buttons.

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).

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Routing Slip

Save to Routing Slip

Go To Page: Patient, Billing, Records, Schedule

Diagnosis Codes:

Diag Code	Description
H25.13	Age-related nucle...
H25.12	Age-related nucle...
H25.11	Age-related nucle...
H25.10	Age-related nucle...
H10.413	Chronic giant pap...
H10.412	Chronic giant pap...

Billing Codes:

A	B	C	Billing Code	Proc Code	Mod	Description	Q'ty	Fee
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Frame	V2020		Frame	1	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Comfort 2	V2781		PAL - Varilux Comfort 2	2	150.00
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Poly-Std	V2784		Polycarbonate - Standard	2	30.00
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AR-Alize	V2750		Anti-reflective coating - Crizal Alize	2	75.00

Notes to Billing (Right-click for defaults) 2

Provider: Dr. Roscher, Adam Staff:

Print Routing Slip check PQRS

Import Diag Code from Last Invoice Import Billing Codes from Schedule Close and Schedule Appointment Delete Close 2

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).

Spectacle Lab Orders

Patient: Bunny, Bugs Order Date: Previous 04/20/2016 Next Routing Slip

DOB: 01/01/1912 Gender: M Authorization #: New Order Edit

Contact # Cell Phone (954) 111-1111 Optician/Staff: Remake Print Order Opt.

Lab/Vendor: Ordered/Ref./Date: Dispense

Lab Contact # Lab Order # Expected Date: 5/04/2016 Received View Log

Dispense Date: Not Dispensed Acct ID: 10003 Status: DVI Remo

Provider:

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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.

A screenshot of the "Spectacle Lab Orders" form. The form includes fields for Patient (Bunny, Bugs), DOB (01/01/1912), Gender (M), Contact # (Cell Phone, (954) 111-1111), Lab/Vendor, Lab Contact #, Lab Order #, Order Date (5/09/2016), Authorization #, Optician/Staff, Ordered/Ref.#/Date, Expected Date (5/23/2016), Status, and Provider. There are tabs for Spectacle Rx 1, Spectacle Rx 2, Spectacle Rx 3, and PL Sun/CL. Below these are input fields for Sphere, Cylinder, Axis, Vert Prism, Hori Prism, Add, Seg Ht, DPD, and Mono PD for both OD and OS eyes. A red arrow points to the "Packages" button on the right side of the form.

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.

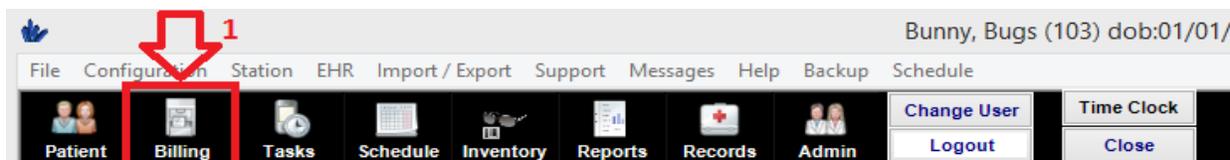
**IF YOU HAVE SELECTED LENS OPTIONS PRIOR TO SELECTING YOUR PACKAGE THEN SELECTING THE PACKAGE MAY OVERWRITE PREVIOUSLY SELECTED OPTIONS DEPENDING ON IF THE OPTION TO CLEAR ALL LENS OPTIONS WAS SELECTED WHILE CREATING YOUR OPHTHALMIC LENS PACKAGE**

At this 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.

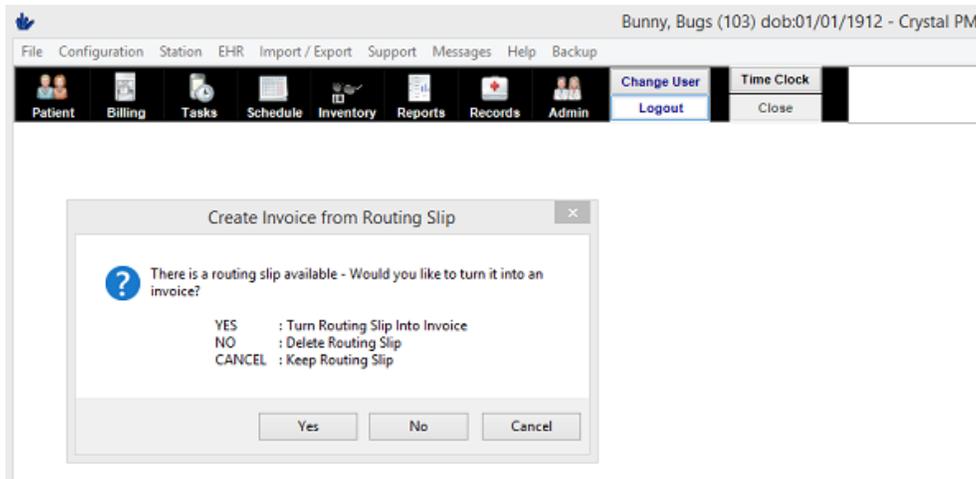
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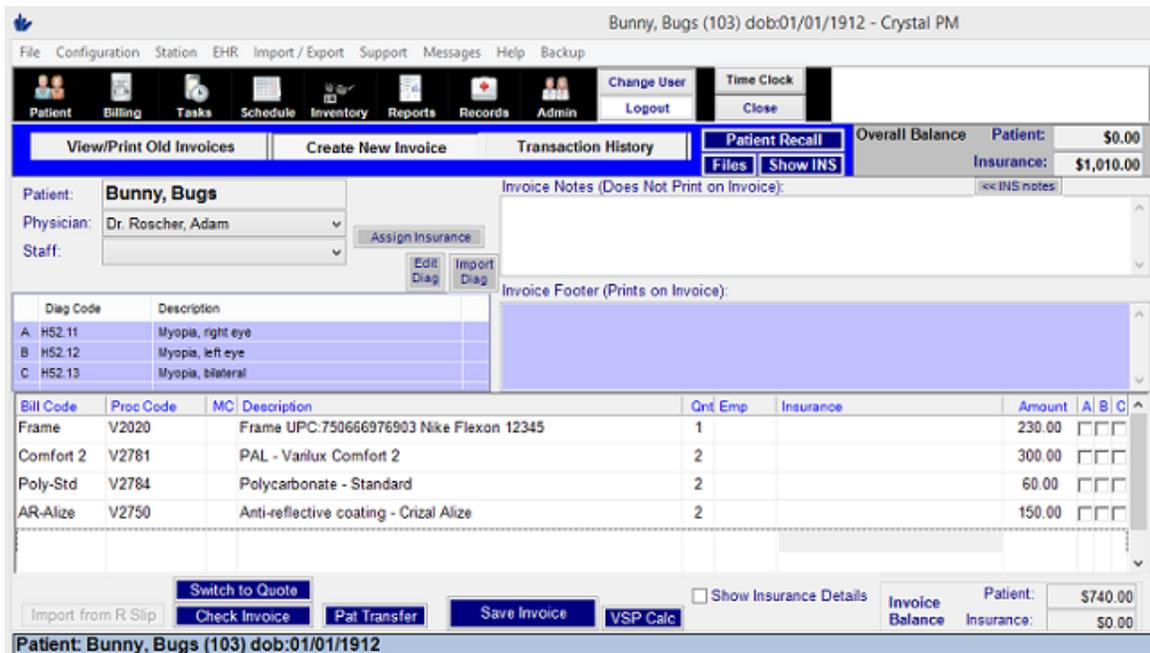


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From here you will want to press the **Yes** button. After you press the **Yes** Button the billing screen will open. In the billing screen you should see all of the options you chose for your patient when creating the order. Please refer to the example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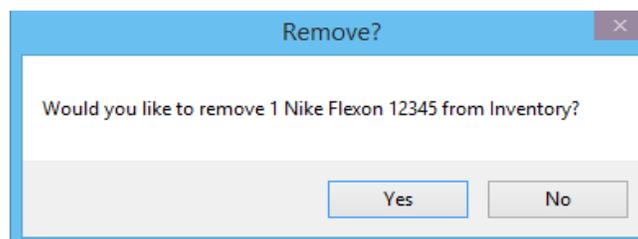


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The screenshot shows the Crystal PM software interface for creating an invoice for patient "Bunny, Bugs". The interface includes a menu bar at the top with options like "File", "Configuration", "Station", "EHR", "Import/Export", "Support", "Messages", "Help", and "Backup". Below the menu is a toolbar with icons for "Patient", "Billing", "Tasks", "Schedule", "Inventory", "Reports", "Records", and "Admin", along with buttons for "Change User", "Time Clock", "Logout", and "Close". The main area is divided into several sections: "View/Print Old Invoices", "Create New Invoice", "Transaction History", "Patient Recall", and "Overall Balance". The "Overall Balance" section shows "Patient: \$0.00" and "Insurance: \$1,010.00". The "Patient" section displays "Bunny, Bugs" and "Physician: Dr. Roscher, Adam". The "Invoice Notes" section is empty. The "Invoice Footer" section is also empty. The "Diag Code" section lists three codes: A H52.11 Myopia, right eye; B H52.12 Myopia, left eye; and C H52.13 Myopia, bilateral. The "Bill Code" section is a table with columns for "Bill Code", "Proc Code", "MC", "Description", "Qty", "Emp", "Insurance", "Amount", and "A B C". The table contains four rows: "Frame" (V2020, Frame UPC:750666976903 Nike Flexon 12345, Qty 1, Amount 230.00), "Comfort 2" (V2781, PAL - Vanlux Comfort 2, Qty 2, Amount 300.00), "Poly-Std" (V2784, Polycarbonate - Standard, Qty 2, Amount 60.00), and "AR-Alize" (V2750, Anti-reflective coating - Crizal Alize, Qty 2, Amount 150.00). At the bottom of the interface, there are buttons for "Switch to Quote", "Check Invoice", "Pat Transfer", "Save Invoice", and "VSP Calc". The "Save Invoice" button is highlighted with a red box and a red arrow labeled "2". The "Invoice Balance" section shows "Patient: \$740.00" and "Insurance: \$0.00", which is also highlighted with a red box and a red arrow labeled "1".

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.

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Bill Code	CPT	Description	Emp	Insurance	Amount	Diag
Frame	V2020	Frame UPC:750666976903 Nike Flexon 12345			230.00	
Comfort 2	V2781	Qnt 2: PAL - Varilux Comfort 2			300.00	
Poly-Std	V2784	Qnt 2: Polycarbonate - Standard			60.00	
AR-Alize	V2750	Qnt 2: Anti-reflective coating - Crizal Alize			150.00	

Print	CMS Form	Make Payment / Adjustment	Product Return	Void Invoice	Edit Invoice	Add Discount
Save to PDF	Upload to Portal	Clinical Summary	Email Portal Access			

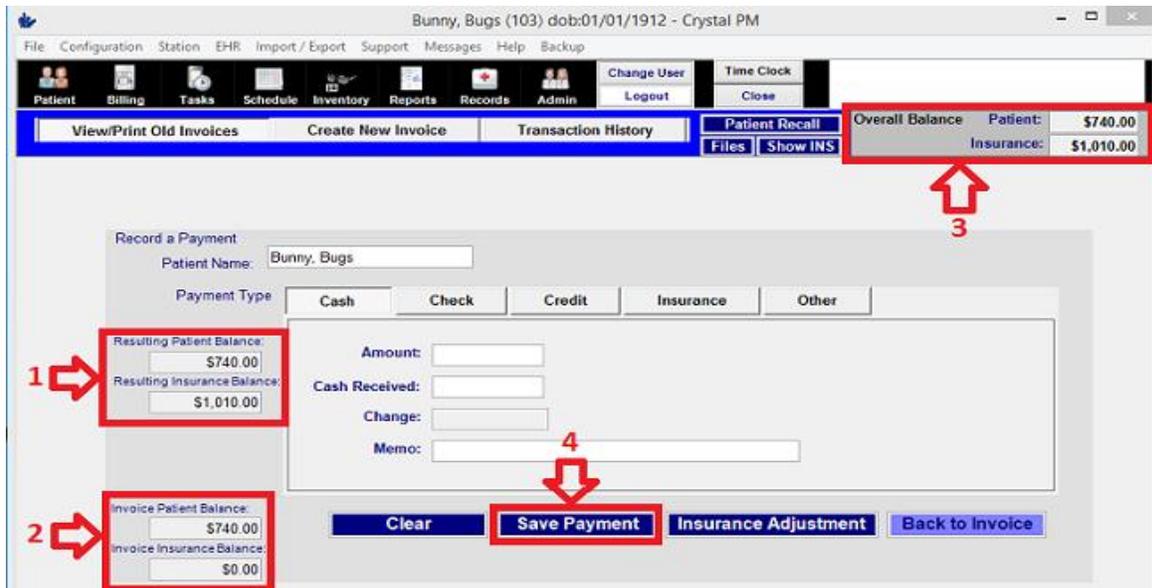
View/Print Options  
 Column View  Hide Diag  
 Row View  Ins Details  
 Custom View  Portal Info

Invoice Balance Patient: \$740.00  
Insurance: \$0.00

Patient: Bunny, Bugs (103) dob:01/01/1912 Dr. Roscher, Adam

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)

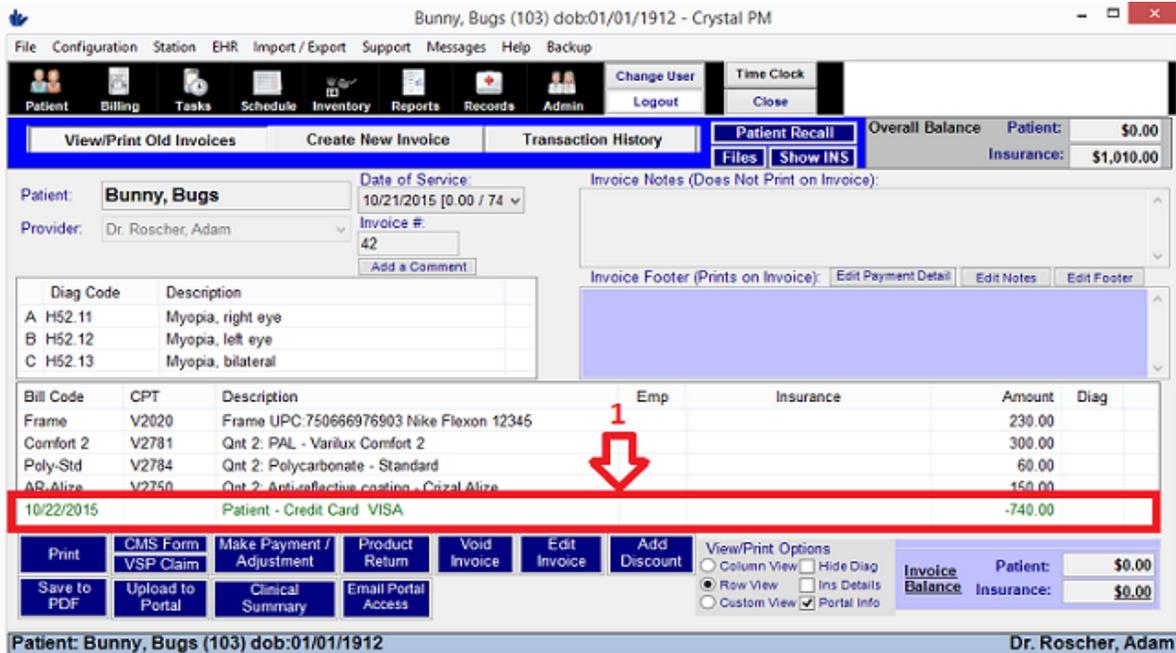
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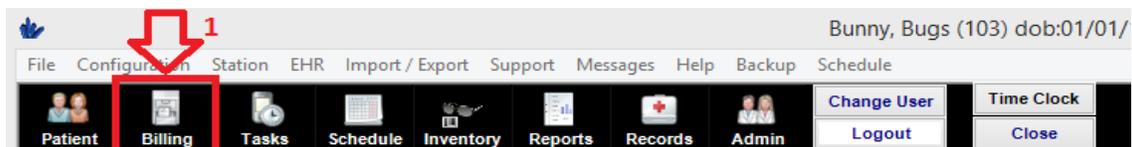
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From here all you need to do at this point is print the invoice by pressing the **Print** button to complete your transaction with your patient.

## 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.

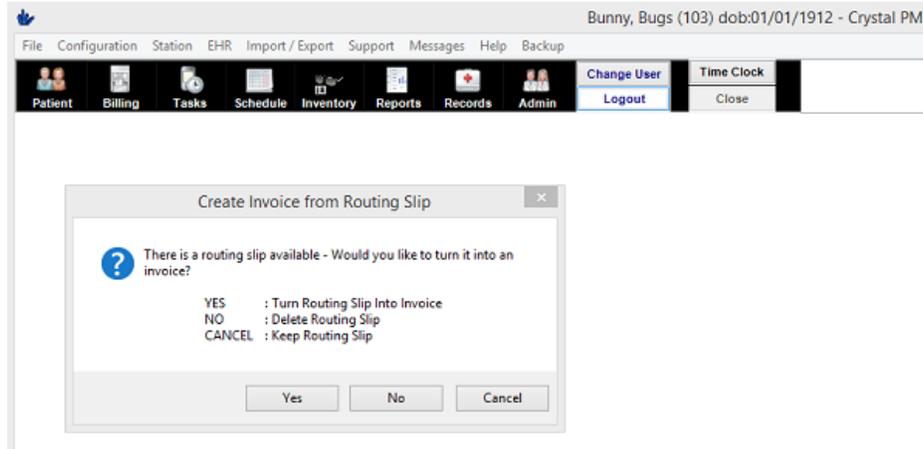
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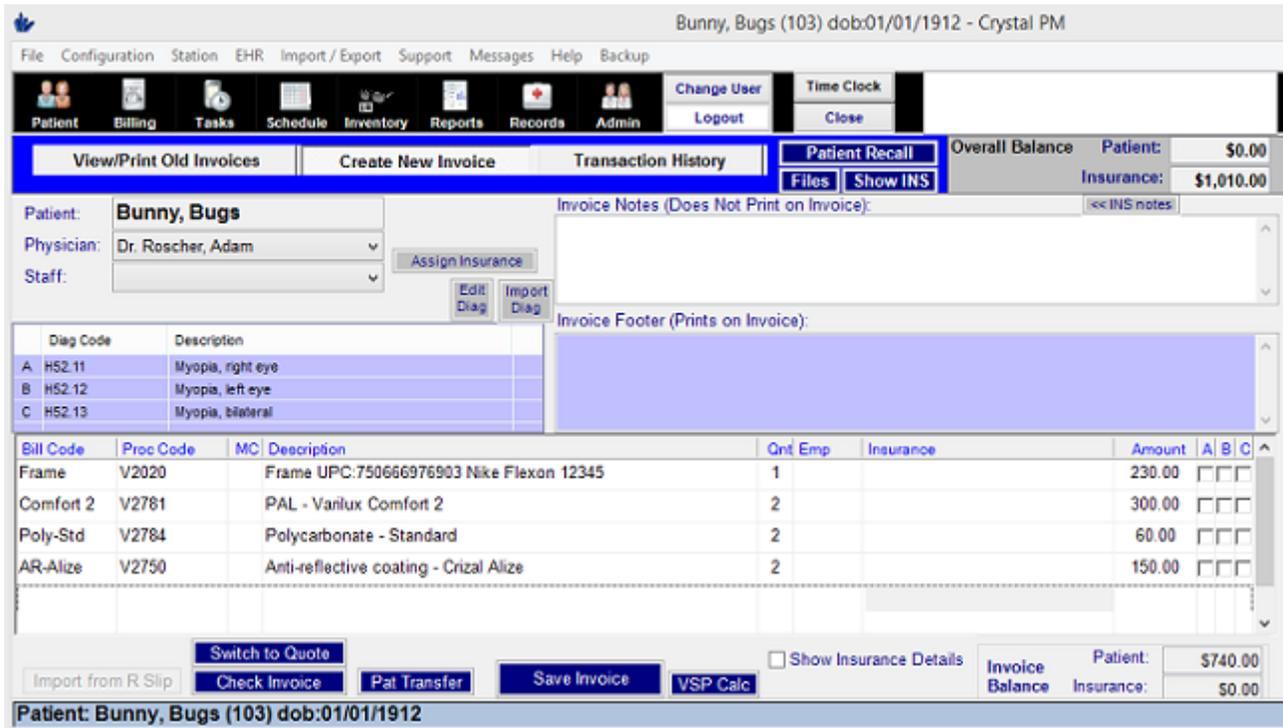


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From here you will want to press the Yes button. After you press the Yes Button the billing screen will open. In the billing screen you should see all of the options you chose for your patient when creating the order. Please refer to the example below.



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).

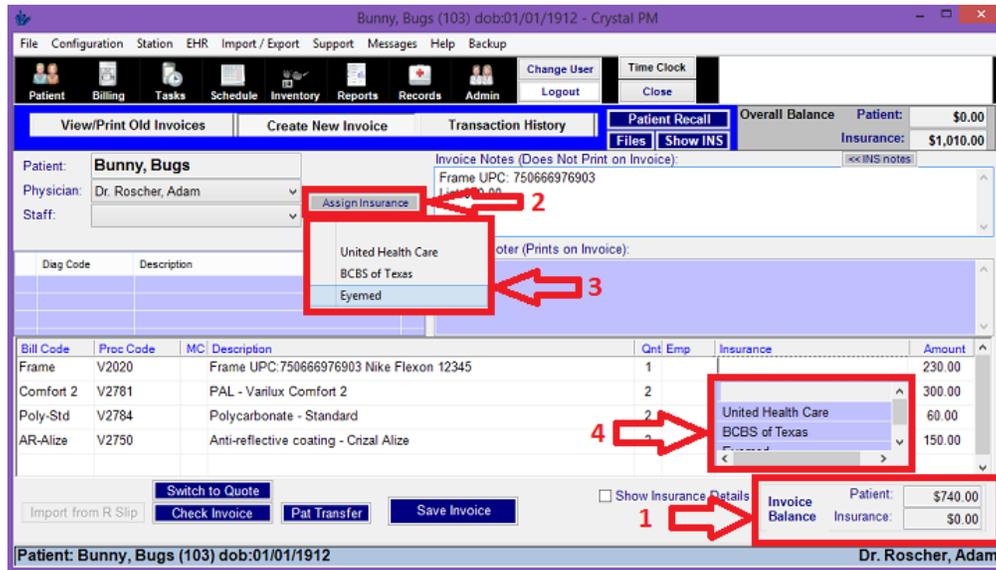
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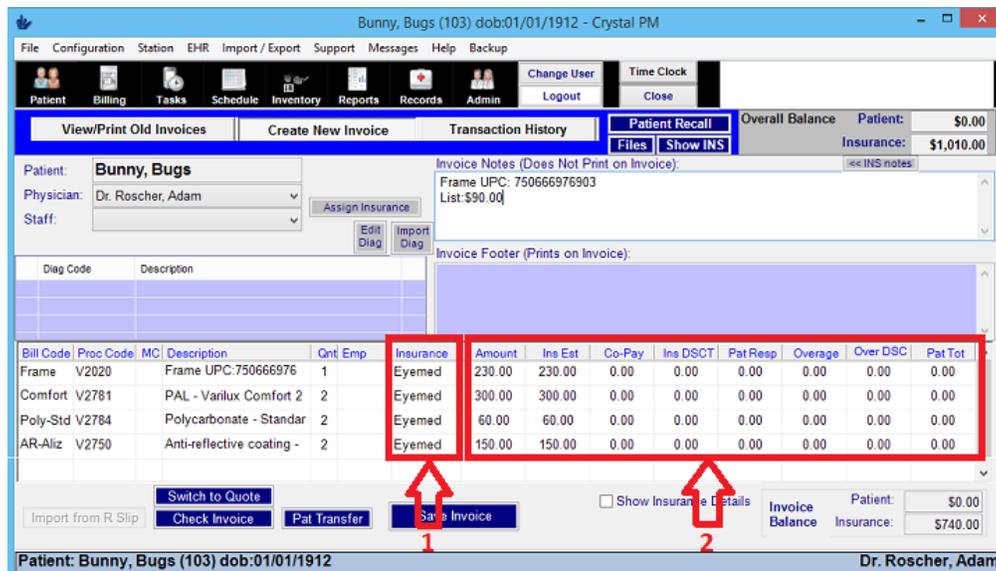
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There are two methods to assign insurance to the line items in the invoice. The first method is by pressing on the **Assign Insurance** button (2). In the example above, pressing this button will open up a small window that will allow you to select 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.



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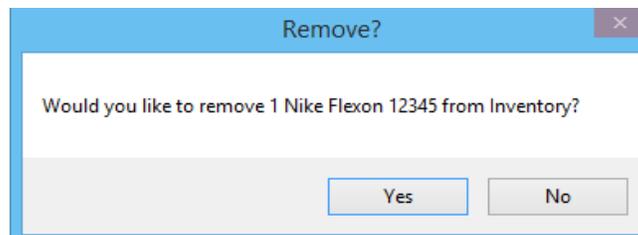
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Once you have assigned the charges to the patient and the insurance as shown in the example below (1) proceed by pressing the **Save Invoice** button.

The screenshot shows the Crystal PM software interface for a patient named "Bunny, Bugs" (DOB: 01/01/1912). The interface includes a menu bar (File, Configuration, Station, EHR, Import/Export, Support, Messages, Help, Backup) and a toolbar with buttons for Patient, Billing, Tasks, Schedule, Inventory, Reports, Records, Admin, Change User, Time Clock, Logout, and Close. The main content area is divided into several sections: "View/Print Old Invoices", "Create New Invoice", "Transaction History", "Patient Recall", "Overall Balance", and "Patient: \$0.00". The "Patient Recall" section has buttons for "Files" and "Show INS", with "Insurance: \$1,010.00" displayed below. The "Patient" section shows "Bunny, Bugs" and "Physician: Dr. Roscher, Adam". The "Invoice Notes" section contains "Frame UPC: 750666976903" and "List:\$90.00". The "Invoice Footer" section is highlighted with a red box and a red arrow labeled "1". Below this is a table with columns: "Bill Code", "Proc Code", "MC", "Description", "Qty", "Emp", "Insurance", "Amount", "Ins Est", "Co-Pay", "Ins DSCT", "Pat Resp", "Overage", "Over DSC", and "Pat Tot". The table contains four rows of data, with the first row highlighted in blue. The "Save Invoice" button is highlighted with a red box and a red arrow labeled "2". The "Invoice Balance" section shows "Patient: \$405.00" and "Insurance: \$335.00".

Bill Code	Proc Code	MC	Description	Qty	Emp	Insurance	Amount	Ins Est	Co-Pay	Ins DSCT	Pat Resp	Overage	Over DSC	Pat Tot
Frame	V2020		Frame UPC:750666976	1		Eyemed	230.00	80.00	0.00	0.00	150.00	0.00	0.00	150.00
Comfort	V2781		PAL - Varilux Comfort 2	2		Eyemed	300.00	150.00	0.00	0.00	150.00	0.00	0.00	150.00
Poly-Std	V2784		Polycarbonate - Standar	2		Eyemed	60.00	30.00	0.00	0.00	30.00	0.00	0.00	30.00
AR-Aliz	V2750		Anti-reflective coating -	2		Eyemed	150.00	75.00	0.00	0.00	75.00	0.00	0.00	75.00

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.

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Bill Code	CPT	Description	Emp	Insurance	Amount	Diag
Frame	V2020	Frame UPC:750666976903 Nike Flexon 12345			230.00	
Comfort 2	V2781	Qty 2: PAL - Varilux Comfort 2			300.00	
Poly-Std	V2784	Qty 2: Polycarbonate - Standard			60.00	
AR-Alize	V2750	Qty 2: Anti-reflective coating - Crizal Alize			150.00	

Print	CMS Form	Make Payment / Adjustment	Product Return	Void Invoice	Edit Invoice	Add Discount
Save to PDF	VSP Claim	Clinical Summary	Email Portal Access			

View/Print Options:  
 Column View  Hide Diag  
 Row View  Ins Details  
 Custom View  Portal Info

Invoice Balance Patient: \$740.00  
Insurance: \$0.00

Patient: Bunny, Bugs (103) dob:01/01/1912 Dr. Roscher, Adam

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.

The screenshot shows the "Record a Payment" screen for patient "Bunny, Bugs". At the top right, the "Overall Balance" is shown as Patient: \$385.00 and Insurance: \$1,365.00, with a red arrow pointing to it labeled "3". On the left side, there are two boxes: the top one shows "Resulting Patient Balance: \$385.00" and "Resulting Insurance Balance: \$1,365.00", with a red arrow pointing to it labeled "1"; the bottom one shows "Invoice Patient Balance: \$385.00" and "Invoice Insurance Balance: \$355.00", with a red arrow pointing to it labeled "2". In the center, there are input fields for "Amount:", "Cash Received:", "Change:", and "Memo:". At the bottom, there are four buttons: "Clear", "Save Payment" (with a red arrow pointing to it labeled "4"), "Insurance Adjustment", and "Back to Invoice".

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)

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The screenshot shows the Crystal PM software interface for a patient named Bunny, Bugs. The window title is "Bunny, Bugs (103) dob:01/01/1912 - Crystal PM". The interface includes a menu bar (File, Configuration, Station, EHR, Import/Export, Support, Messages, Help, Backup), a toolbar with icons for Patient, Billing, Tasks, Schedule, Inventory, Reports, Records, Admin, Change User, Time Clock, Logout, and Close. Below the toolbar are tabs for "View/Print Old Invoices", "Create New Invoice", and "Transaction History". The "Transaction History" tab is active, showing a table of transactions. The first transaction is highlighted in red and has a red arrow pointing to it with the number "1". The table has columns: Bill Code, CPT, Description, Emp, Insurance, Amount, Diag, Disc, Insur, Patient. The highlighted row is: 10/28/2015, Patient - Cash Payment, -385.00, 0.00, -385.00. To the right of the table is a section for "Invoice Notes" and "Invoice Footer". At the bottom of the window, there are buttons for "Print", "CMS Form", "Make Payment / Adjustment", "Product Return", "Void Invoice", "Edit Invoice", "Add Discount", "Save to PDF", "Upload to Portal", "Clinical Summary", and "Email Portal Access". There are also "View/Print Options" and a summary box showing "Invoice Balance" and "Patient: \$0.00", "Insurance: \$355.00". The status bar at the bottom reads "Patient: Bunny, Bugs (103) dob:01/01/1912" and "Dr. Roscher, Adam".

From here all you need to do at this point is print the invoice by pressing the **Print** button to complete 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.