How to create a letter in Crystal

Step 1. Open up Crystal.





Step 3. On the right hand of the page. Click the button "Letter"

File Configuration	n Station EH	HR Imp	ort / Export Suppo	rt Help El	HR Settings									
Patient Billin	g Tasks	Sched	ule Inventory R	eports Red	cords Ad	nin					(Change U	ser Logo	out Close
Test, Crystalp	m		Diag His Dru	ıg His Shi	ft F8 No	Doctor Assign	ned				Letter	R Slip	Files Sp	ec RX CL R
Chief Complaint today	Medical Hx today	ROS today	OSDI today Objective today	Refraction today	Binocular today	Prescription today	Exam today	CL fit today	CL F.o today	Post-Op today	Interp today	A & P today	Drug RX today	ARRA today
CHIEF COMPLA	INT								_					Previous

Step 4. Within the letter page that shows up. Select the button "Admin Wizard"

Patient Letters	
Type Of Letter Exam Findings	etter Create RTF Save RTF
East Main Vision Clinic 2732 East Ave #200, Puyallup WA 98372, Phone (253) 770-2732, Fax (253) 770-1023.	
Eye Exam Findings	
To: Dr. <pcp> Date of report: <today's date=""></today's></pcp>	
<i>A full case of Patient Name></i> , DOB: <date birth="" of="">, was seen in our office on <exam date=""> for a full eye health evaluation with <dr. day=""></dr.>. A full case review has been performed; the patients medical, social, family and ocular history was recorded.</exam></date>	
Purpose for visit: <c.c.></c.c.>	E
Patient's Health History: <health 1="" hx=""> <health 2="" hx=""> <health 3="" hx=""> <health 4="" hx=""> <health 5="" hx=""> <health 6="" hx=""> Surgeries and Hospitalizations; <health 7="" hx=""></health></health></health></health></health></health></health>	
If the patient is Diabetic; Average blood sugars <blood sugars=""> and Last A1C: <a1c> as reported by the patient.</a1c></blood>	
Initial Pre-testing: Intra Ocular Pressures (IOP's), OD <iop od="">mmHg, OS <iop os="">mmHg; Blood Pressure: <bp systolic=""> / <bp diastolic=""></bp></bp></iop></iop>	
Patient's Ocular history: <oc hx="">, Surgeries: <occ sx="">, Current Drop therapies: <current drops=""></current></occ></oc>	
The findings reported below are displayed, Right eye, Left eye, additional findings.	
Exam Findings: Anterior Segment Evaluation: <slit lamp=""> Adnexa - <adnexa od=""> / <adnexa os="">, <adnexa add=""> Eye Lids - < Lid OD> / <lid os="">, <lid add=""> Conjunctiva - <conj od=""> / <conj os="">, <conj add=""> Tears - <tears od=""> / <tears os="">, <tears add=""> Comea - <comea od=""> / <comea os="">, <comea add=""> Anterior Chamber - / , Iris - <iris od=""> / <iris os="">, <iris add=""> Crystaline Lens - <lens od=""> / <lens os="">, <lens add=""></lens></lens></lens></iris></iris></iris></comea></comea></comea></tears></tears></tears></conj></conj></conj></lid></lid></adnexa></adnexa></adnexa></slit>	
Exam Findings: Posterior Segment: Evaluation: <fundus eval=""> with <fundus photo=""></fundus></fundus>	

Step 5. This will bring you to a page as seen below.

Side Note: Please be aware if you are on level 2 access. You will need to have the full admin password or the limited admin password to acess this page.

Anthronia						
Ambiyopia		Letter Name	Amblyopia			
Pattern Insert Name Here	Value -10. First Name -2. Exam Date	Remove Remove	Insert	Pattern Name Here	Value -8. Last Name	Add Field ? Remove
Ambhania (Lazy Ev			*Do not use	field ids for Me	dication or Allergy, use patie	nt codes (-168 -> -171
	-)					
Lazy eye, or amblyop problem and is not co associated with cross two eyes. It usually di Symptoms may inclu not always obvious.	pia, is the lack of deve orrectable with lenses, sed-eyes or a large di evelops before the ag ide noticeably favorinç	lopment of centr It can result from ifference in the d le of 6, and it doe g one eye or a te	ral vision in n a failure to egree of ne as not affec endency to	one eye that o use both ey arsightedne t side vision. bump into ob	is unrelated to any eye res together. Lazy eye is ss or farsightedness be jects on one side. Symp	health E soften tween the
Treatment for lazy ey Vision therapy teach	re may include a comb es the two eyes how to	oination of presc work together,	ription lens which helps	es, prisms, v s prevent lazy	ision therapy and eye pa v eye from recurring.	atching.
Early diagnosis incre Association recomm again at age 3. Lazy takes longer and is c	ases the chance for a ends that children hav eye will not go away o ften less effective.	e complete recov e a comprehens n its own. If not d	very. This is sive optom liagnosed u	one reason etric examina until the pre-te	why the American Optor tion by the age of 6 mon een, teen or adult years,	metric hths and treatment
sadfasdfdsfasdfsdaf	asdfsdfdsafsdfsdfsda					
trl and direction :> (change hift and direction :> (change	e position) je size)	Save	Letter Templa	ite Do	not use previous medical re ata from 1 day only)	cord information

Step 6. To start a new letter. Select the "Create New Letter" button.

Amblyop	sia	
Create	New Letter	Delete Letter
-	Pattern	Value
Insert	Name Here	-10. First Name
Insert	Name Here	-2. Exam Date

Step 7. This will bring up a blank letter. With the ability to name the letter, edit the letter, and insert information from that patients record.



Step 8. Within the light grey box. You will want create one of the 4 types of boxes to be chosen.

Choice 1- Header 1 (Bold, Size 14, Center) Header 1

Choice 2- Header 2 (Bold, Size 12, Underline) Header 2

Choice 3- Header3 (Size 10, Underline) Header 3

Choice 4- Textbox (Multi-line, Size 10)

Choice 5- Rich textbox

Choice6- Checkboxes



Step 8. Different Types part 2.

Textbox- A text box is just a white box that allows an un-limited amount of text to be inserted in. If the text goes beyond the textbox's size. It will initiate the scroll bar, and will allow the scroll bar within the box to allow you to scroll up and down to see the text. To change the size of the textbox itself. Please see Step 12 to learn how to move and change the size. (Note: The text cannot when printed if the text goes beyond the size of the box and scroll bar is needed)

RichTextbox- Allows the font to be changed. Along with the size of the actual text. This also allows the ability for you to change the color of the text, Bold the text, Italtic the txt, and underline the text. (Note: The editing buttons and selections next to the richtextbox. Will not show up on the actual letter when being printed out and can only be viewed in edit mode (Admin Wizard)

CheckBoxes- This allows you add checkboxes with the exact names that you want to use. To do so, click the "Add Item" button and type the text that you want to be next to the checkbox itself. You can also remove these checkboxes by selecting the checkbox/text, and clicking the "Remove" button. To move the checkbox up on the listing. Select the checkbox/text and press up. The same rule applies for moving the actual checkbox

👉 Wizard Patient Letters			
Letter Name	Letter Name Letter	for examples	
Create New Letter Delete Let Pattern Value	ker	Pattern Value	Add Field
Header 1	*Do no Pressing the B to my right. Bolds text Example 1- Bold	t use field ids for Medication or Allergy, us B I 12.0 I	e patient codes (-168 -> -171)
Header 2	Click the B again. To deselect Bold. Like so.	Agency FB	=
Header 3	Select the Capital i for Italics. This wil slant your text.		
Hello Everyone. I hope your having a great day and enjoying this step by step process to help train yourself with letters.	 Example 2- <i>Italic</i> Select the underline U to underline you text. Example 3- <u>Underline</u> To choose a color for your text. Select the blank button on the very right. Example 4- Colors, Brown, blue, pink, black, <- Yes white will not show up. 	Up will move the box up Add item will add check box Remove will remove box Down will move the box down	Add Item Remove Up Down
Ctrl and direction :> (change position Shift and direction :> (change size)) Save Letter Te	emplate Do not use previous med (data from 1 day only)	tical record information

Step 9. Adding Field values into your letter.

To add values into the letter. You will need to press the "Add Field" Button.

wizard Patient Letters			
Letter for examples	Letter Name	Letter for examples	
Create New Letter Delete Letter Pattern Value Inset Name Here 0. Blank	Remove	Pattern Value	Add Field
Field			$\langle 1 \rangle$
`			Press to
		"Do not use field ids for Medication or Alleroy, use nat	Add Field

Step 10. As seen above. The add field button will bring in an area with a Pattern and Value.

Value- This is the information that will be brought into the section of the letter. When the field itself is inserted. Please look at Step 11 for instructions.

Pattern- The Pattern is just the naming for the value. It will not show anything outside of the Admin Wizard (Letters Edit Mode) and is only there to identify the information to you and your staff. To help instruct you on what information is coming in. It also needs to be the same once inserted into the letters itself.

Step 11. Choosing your Value.

Choosing the correct number is selecting it from the drop listings of the values. Please keep in mind that all the positive FID numbers are the ones from your EMR/Records page, and the negative FID Numbers are the hard-coded (cannot be changed) from the patients page.

Letter for examples	•	Letter Name	etter for examples
Create New Letter	Delete Letter		
Pattern	Value		Pattern Value Add Field
Insert Name Here	0. Blank 0. Blank 1. Technician: 2. Occupation: 3. Employer: 4. Referred By: 5. Referring Physician 6. Family Patients: 7. Hobbies: 8. Computer Use: 9. Depthere with elege	Remove	Do not use field ids for Medication or Allergy, use patient codes (-168 -> -171)
Header	10. OTHER PATIENT 11. Last Eye Exam:	the B to my right. Bold	s text B I U
Header 2	12. CC 13. Primary Care Physi 14. Doctor:	⊧ 1- Bold	
Header 3 Hello Everyone, I hope your having a g day and enjoying this : step process to help tr yourself with letters.	15. Eye Meds: 16. PATIENT OCULA 17. Systemic Meds: 18. PATIENT MEDICA 19. FAMILY MEDICAL 20. Major Surgeries, hr 21. Allergies: 23. Old CL OD: 24. Old CL OD: 24. Old CL OS: 25. Wear Time Today 26. Wearing Schedule 27. Disposal: 28. Cleaner: 29. CC: Examplack	ne 15 again. To des ike so. he Capital i for Italics. T ur text. 2 <i>2. Italic</i> he underline U to under 33- <u>Underline</u> se a color for your text k button on the very rig ple 4- Colors, Brown, blue , <- Yes white will no	sect Image: Sect <
trl and direction :> (chang	e position)	Save Le	ter Template Do not use previous medical record information

As seen above. When selecting the drop down on value. The ability to the field of the information that you want brough in.

Step 12. Changing the size of the textbox.

Select the text box that you want to have change in size.

- 1. To move the actual box follow the steps below.
 - a. Hold down Ctrl and use the arrow keys to move the box.
- 2. To change the actual box size. Follow the steps below.
 - a. Hold down Shift and use the arrows keys to increase the size of the box.
 - b. Up and down arrows will increase the box height.
 - c. Left and right arrows will increase the width

Step 13. Inserting the field .

To insert the field. You will want to name the pattern, and make sure the correct value has been selected. From there you must select the area on the page by selecting the area of text or area of any box to where you want the field to be insert. From there you can click "Insert", and this will drop the Pattern name into this area with <> around it. Look below for an example.

l etter for examples	· Latter Menn		
Create New Letter	Letter reame Letter for e	examples	
Defete Cetter		Dettern Males	Add Field 2
Fattern Value		Fattern Value	
	n. • Remove		
	*De est ut	a faild ide far Madiantine ar Alleren i sea	antiant and as (100 x 171
	Donotus	e lielo los los medicadon ol Allergy, use	papent codes (*100 *3 *171)
Header 1	Pressing the B to my right. Bolds text	BIIU	0
	Evenue 1 Pold	120	
eader 2	Example 1- Bold		
	Click the B again. To deselect	Agency FB	-
	bold. Like so.		
eader 3	Select the Capital i for Italics. This will slant your text		
alla Evaniana	En 1 2 4 5	N=	
nope your having a great	Example 2- Raic	Up will move the box up	Add Item
ay and enjoying this step by	Select the underline U to underline your	Add item will add check box	Remove
lep process to help train	lext.	Remove will move the box down	Up
ourself with letters.	Example 3- Underline		Down
\sim	To choose a color for your text. Select		
/e are glad that < Tech> was	the blank button on the very right.		
	Example 4- Colors, Brown, blue, pink,		-
ble to help you out today.	black. <- Yes white will not show		
ble to help you out today.	un.		
ble to help you out today.	up.		
ble to help you out today.	up.		
ole to help you out today.	up.		

Step 14. Once your letter is complete. Click the "Save Letter Template" button and your letter will now be saved under that letters name.

Step 15. Below is a picture of the letter. Out of "Admin Wizard' (Edit Mode) and you can see the insert field.

Patient Letters		Patient Letters	
Type Of Letter Letter for examples		Type Of Letter Letter for examples	
Header 1		Header 1	
<u>Header 2</u>		<u>Header 2</u>	
Header 3		Header 3	
Hello Everyone, I hope your having a great day and enjoying this step by step process to help train yourself with letters.	*	Hello Everyone. I hope your having a great day and enjoying this step by step process to help train yourself with letters.	*
We are glad that <tech> was able to help you out today.</tech>		We are glad that Jennifer Smith was able to help you out today.	
	-		Ŧ

Before Values inserted

After Values are Inserted