

EMAIL SETUP IN CRYSTAL PM



Non-direct email is a useful tool to send appointment reminders to patients as well as other scheduled communications such as “Happy Birthday” and promotional emails. **Non-direct emails should never include any PHI information.** (*The Patient Portal is the best tool to send records, invoices, and other PHI information directly to your patients.*)

Direct Email is the best tool to send Continuity of Care reports (medical records) along with other reports and documentation to referring providers.

NON-DIRECT EMAIL

Note: *If you want to send emails from the Schedule or Correspondence Report, you must have an email set up in Microsoft Outlook. If you have an email that is not set up in Microsoft Outlook, you can ONLY send mass emails out of the Recall report.*

To set this up, go to Admin > Email > Email Settings (non-Direct).

Fill in all the information on this screen and save. The port for Gmail is 587. If you are using something other than Gmail, you’ll need to get the correct SMTP port # from your email carrier.

A screenshot of the "Email Settings (non-Direct)" configuration page. The page has three tabs: "Direct Inbox", "Direct Settings", and "Email Settings (non-Direct)". The "Office Email (to send Email Messages to Patients)" section contains the following fields: "SMTP Server" (smtp.gmail.com), "Port" (587), and "From Name" (Mickey Mouse). Below these are "From Email" (mmouse@gmail.com) and a checked checkbox for "SMTP requires authentication". An "SMTP Authentication" section includes "Username" (mmouse@gmail.com) and "Password" (xxxxxxx). At the bottom are "Test SMTP" and "Save Server Information" buttons. An example "ex: smtp.gmail.com:587" is shown next to the port field.

Be sure to test your setup using the “Test SMTP” button. Sometimes Gmail blocks mass emails from Crystal because it does not recognize the software. To fix this, go to <https://www.google.com/settings/security/lesssecureapps> and **turn on** the access for less secure apps.

Sending emails from the Recall Report:

Next, In Admin>Recall, make sure your Recall Action set to “email”. Then complete your Email Options as shown below. (*See Recall document for further instructions on how to set up Recalls.*)

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Recall Types | Recall Actions

Recall Action: Adult Spec Exam

New Recall Action | Save | Remove

Action Name: Adult Spec Exam

Phone Email Postcard Letter Address Label

Email Options

From Name: Mickey Mouse

From Email Address: mmouse@gmail.com

Subject: It's time for your annual eye exam.

Insight Practice Management
11118 Conchos Trail
Austin, TX 78726

Dear <CourtesyTitle> <FirstName> <MiddleName>.

It is time for your eye exam. Your last full eye exam was on <LastExamDate>. It is recommended that you call Insight Practice Management at (512) 335-1976, as soon as possible to schedule your annual eye exam in order to renew your prescription and check for ocular health.

Thank you,
Insight Practice Management

[Send Test Email](#) [Show Values](#) [List of Possible Variables](#)

Lastly, run the Recall report, and click “Print/Send”. This will send out your emails automatically.

You would then click the “Send to Email” button and select a Word document that you have already created and saved on your computer.

Sending emails from the Correspondence Report –

You can use the Correspondence Report to filter just about any demographic information you want. You can run a report of upcoming birthdays to send a “Happy Birthday” email. You can filter a specific insurance to notify patients that you are now in network with that insurance. Those are two of endless possibilities.

When you generate the report you want, simply click the “Email with office” button and browse for the document you want to send.

Sending emails from a patient file –

If you want to send an email directly to one patient, in the Patient module, just click on the blue email link.

Sending emails from Schedule –

In Schedule, click the “Email Office” button to send an email to all patients on that day’s schedule.

Patient | Billing | Tasks | Schedule

Quick View | Patient Info | Additional

CLOWN, KRUSTY
811 Rainy St.
Springfield, MO 81522
kthec@penguinwaddle.com

Send Office

Email Office

1:45 PM	
2:00 PM	
2:15 PM	HAND
2:30 PM	
2:45 PM	
3:00 PM	

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DIRECT EMAIL (SECURE EMAIL) –

Direct email allows you to send patient records and other documents containing PHI securely to another provider. Please note that the receiving provider must also be set up with a direct email account.

This setup must be done by a Crystal PM support representative. To initiate this process, please send an email to support@crystalpm.com stating that you would like to set up a direct email account.

Fees –

- There is an **annual fee of \$240** per office to set up the integration. This is a **NON-REFUNDABLE FEE**.

To add a referring provider's direct email into Crystal:

- Go to Admin>Defaults>Patient Page Defaults>Professional Referral.
- If the doctor or practice is not already added, click "Add Item" and enter the name and click OK. If they are already on the list, go to the next step.
- Then double click on the name to open the Referral Information box.
- Enter that provider's email in the "Secure Email (Direct)" box.
- Click Save.

Office Information	
Name	Kids Connection
Prefix	First
Printed Name	
Secure Email (Direct)	office2@direct.associate.com
Phone	() -

To send a direct email:

- Open the patient's medical record.
- Go to EHR Settings > External Data > Send Referral Info.
- Select provider from dropdown under Clinical Summary or enter the direct email address in the "To" box.
- Enter your subject header and body note.
- Select Clinical Summary or Custom. The Custom allows you to send other file attachments.
- Click "Send Direct Secure Email".

Summary Form

This Form allows entry of data from External Sources and generation of Messages for Government Agencies. [External Data Includes: Lab Results, Diagnostic Tests Performed, and Immunizations. Messages Includes: Public Health and the Centers for Disease Control and Prevention (CDC)]

Import/Export Patient | Orders | Test Results | Send Referral Info | Immunization | Notify CDC

To: office2@direct.crystalpm.com

Subject: Transition of Care

Body: Transition of Care for Mickey Mouse.

Send Direct Secure Email

Clinical Summary Custom

Refer to Physician:
Cat Dr, Address[Address 1, Address 2, City, State, Zip Code,]

Patient moving to new location.

Export Transition of Care to File

Attachments:
Add
Remove

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To check incoming direct emails:

- Go to Admin > Email > Direct Inbox.
- Click “Check for New Direct Email”.
- Click on the email line (highlighted in blue below) and then click the .xml file at the bottom.

The screenshot shows the Crystal PM software interface. The top navigation bar includes buttons for Patient, Billing, Tasks, Schedule, Inventory, Reports, Records, and Admin. The Admin menu is open, showing options like Change User, Logout, and Close. The left sidebar contains various menu items, with 'Email' highlighted. The main window displays the 'Direct Inbox' tab, which contains a table of emails. The email dated 09/26/2014 is highlighted in blue. Below the table, there are links to 'View Email Message' and 'View Header'. The email content shows a 'Transition of Care' message. At the bottom of the email content, there are two links: 'Test Patient 19560101.xml' and 'Test Patient 19560101.html'. A 'delete' button is also visible.

Date	From	Subject	Body	Attachments
07/31/2014	...	Transition of Care	Transition of Care for ...	2
09/26/2014	...	Transition of Care	Transition of Care for ...	2
09/29/2014	...	Transition of Care	Transition of Care for ...	2
01/28/2015	<office2@direct.cryst...	Transition of Care	Transition of Care for ...	2
02/02/2015	...	CPM TEST Direct	CPM TEST DIRECT M...	0
02/02/2015	...	CPM TEST Direct	CPM TEST DIRECT M...	0

- You'll then get the option to “Add to Patient’s Chart” or “Execute File”.
- If you click “Execute File”, it will open the report and give you options at the top to “Create New Patient” or “Merge into Existing Patient”.

The screenshot shows the Crystal PM software interface displaying an 'Encounter Summary' report. The report is titled 'Encounter Summary' and includes a section for 'Patient Demographics'. Below this, there is a 'Table of Contents' section with a list of links to various report sections:

- Reason for Referral Section
- Encounters Section
- Problem List
- Medications Section
- Allergies List
- Immunizations Section
- Social History Section
- Results Section
- Procedures Section
- Functional Status Section
- Plan of Care Section
- Vital Signs Section
- Instructions Section