Data Transfer Guide

Crystal Practice Management

2014
Data Transfer Guide

GO PAPERLESS

Essential and comprehensive practice management software for optometric offices

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The Purpose and Benefit of a Data Transfer

The purpose of a data transfer is to bring forward information from your previous software. Data transfers are a great way to make your company's transition to Crystal Practice Management efficient and can also help speed up your office's learning curve.
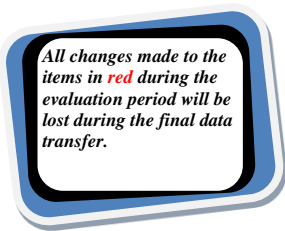
Getting Started

There are 2 stages for your data transfer:
Stage 1 = Evaluation Data
Stage 2 = Final Data
This process allows you to review your information in the new format before it becomes permanent. You may set most things up before the final transfer **EXCEPT**:

All changes made to the items in red during the evaluation period will be lost during the final data transfer.

○ Employees
○ Insurances
○ Schedules
○ New Patients (Patient list will be current up to the time of the final data transfer)
○ Recall Types (you may create your recall Templates, but not the recall Types)
○ Scanning of all documents (example: paper medical records, glasses, invoices, outside prescriptions)

All changes made to the items in red during the evaluation period will be lost during the final data transfer.

During your data evaluation period, please examine your data transfer closely (*not all items are applicable in every data transfer). *We also suggest before going live with Crystal that you run Crystal and your current software side by side for a day or two.*

Review patient data for at least 20 patients:
- Run Crystal concurrently with your existing software.
- When you look up existing patients, look them up in Crystal.
  - Compare all information (Demographics, Balances*, Insurance*, Records*, etc.)
  - Email a list of discrepancies to datatransfer@crystalpm.com
- When you create a new patient in your existing software, also create a new patient in Crystal.
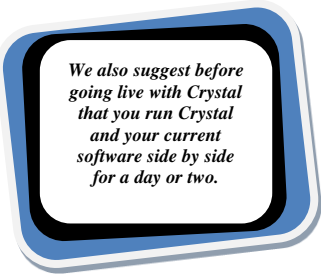 *(*not all items are applicable in every data transfer)*

Data Inspection *(*not all items are applicable in every data transfer)*

Patients Tab*
- Did the patient demographics transfer correctly?
- Did the insurance information transfer correctly?
- Did the recall transfer correctly?
- Did the spectacle and contact lens order transfer correctly?
- Did the notes transfer correctly?

We also suggest before going live with Crystal that you run Crystal and your current software side by side for a day or two.

Schedule Tab*
- Did the appointments transfer correctly?

<u>Records Tab</u>*

- Did the old records transfer?
- Did it transfer one field to another field correctly?

<u>Billing Tab</u>*

- Did all your fees transfer to Crystal correctly? (Admin – Billing)
- Compare invoices in your existing software and see how it transferred in Crystal.
- Did the insurance balances come over correctly?
- Did the patient balances come over correctly?

<u>Reports Tab</u>*

- Run a Daily Transaction report
- Run a monthly transaction report
- Run other reports you normally run in your existing software

<u>Inventory Tab</u>* (May not be available for all transfers)

- Pull 10-20 frames from the floor and see if you can find them in Crystal
- Double check all detail information (UPC, Frame name, price, quantity on hand… etc.)

(*_not all items are applicable in every data transfer_)
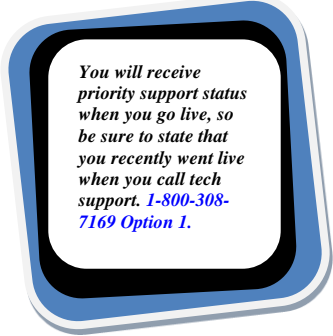
Preparing for the Final Data Transfer

Customer Responsibility Before the Final Data Transfer
- Signed Data Transfer Agreement
- Inspect all aspects of the evaluation data transfer

When preparing to go live, note the following:
Items that cannot be saved:
- **Insurance** – *all changes made during the evaluation period will be lost during the final data transfer.*
- **Employees** - *all changes made during the evaluation period will be lost during the final data transfer.*
- **Schedule -** *all changes made during the evaluation period will be lost during the final data transfer.*
- **Patient Info -** *all changes made during the evaluation period will be lost during the final data transfer.*
- **Recall Types -** *all changes made during the evaluation period will be lost during the final data transfer.*

> *You will receive priority support status when you go live, so be sure to state that you recently went live when you call tech support. 1-800-308-7169 Option 1.*

Items that can be saved:
- **Defaults**
- All **Admin** except above

Items that can be saved **IF** requested: (send these requests to datatransfer@crystalpm.com.)
- Inventory: Frames, CL, Misc., and Labs
- Templates
- Letters
- Records for Procedure

Scheduling and Paperwork

- Email Kirsten for Data Transfer Scheduling and Paperwork: kirstencrystalpm@gmail.com
- You will receive priority support status when you go live, so be sure to state that you recently went live when you call tech support. 1-800-308-7169 Option 1.

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