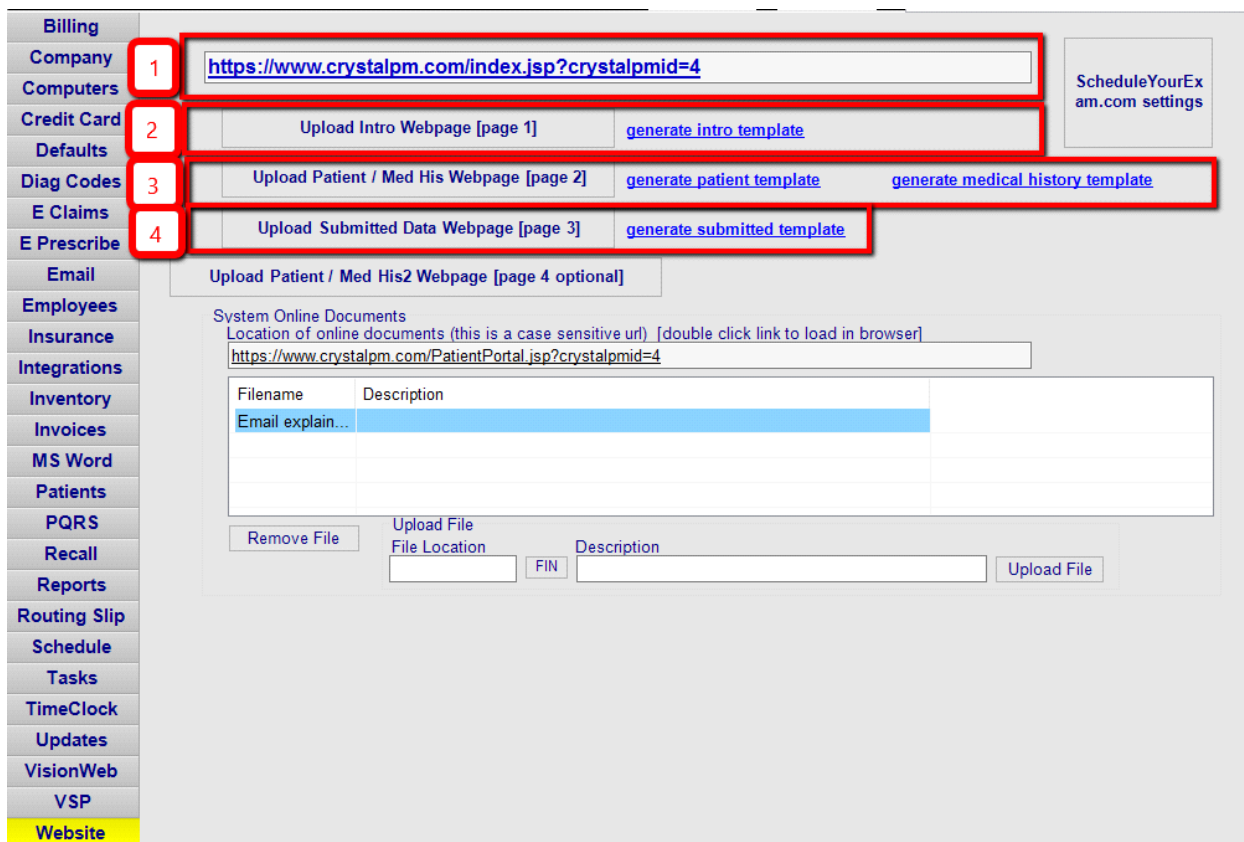# Basic Online Form Guide

This guide will teach you how to create basic online forms from your Crystal medical record template. Our online form template uses HTML, so experience with HTML will be necessary for anything more than minimal edits. To customize your forms beyond what this guide teaches you, or if you have any questions, please call 800-308-7169 ext. 1 or email onlineforms@crystalpm.com.

Admin Page

In Crystal, this page can be found by going to Admin- Website.

1. This link will be where your online forms are located. You can add this link to your website to give patients access.

2. This is the button that will allow you to upload your edited intro webpage*
3. The area where you can upload your online forms once you've finished creating them. The first link to the right of this button, 'Generate Patient Template', gives you instructions on how to export the base of your online forms. The second link, 'Generate Medical History Template', gives you instructions on how to export your medical history from your record template. This guide will go over these instructions below.
4. This button will allow you to upload your edited Submitted Data webpage*

*It is recommended that you allow Crystal to make these changes for you.

Generate Patient Template

Go into the Patient Tab within Crystal, then choose Import / Export above the tabs, and click Export New Patient WebPage, and save this file. After naming this file, be sure to add .html to the end of the name so it saves in the correct format. This file will be the demographics and insurance portion of your online forms.

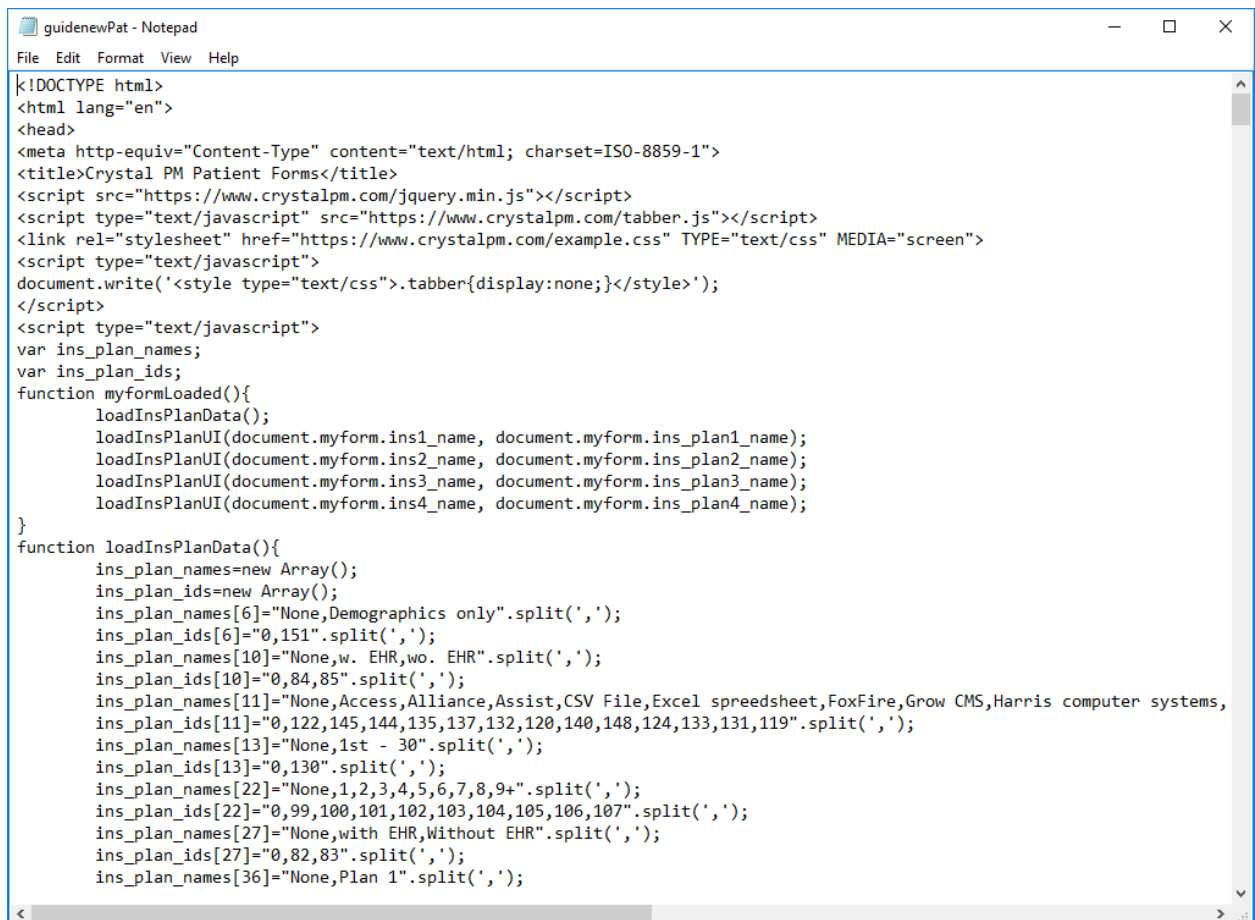## Generate Medical History Template
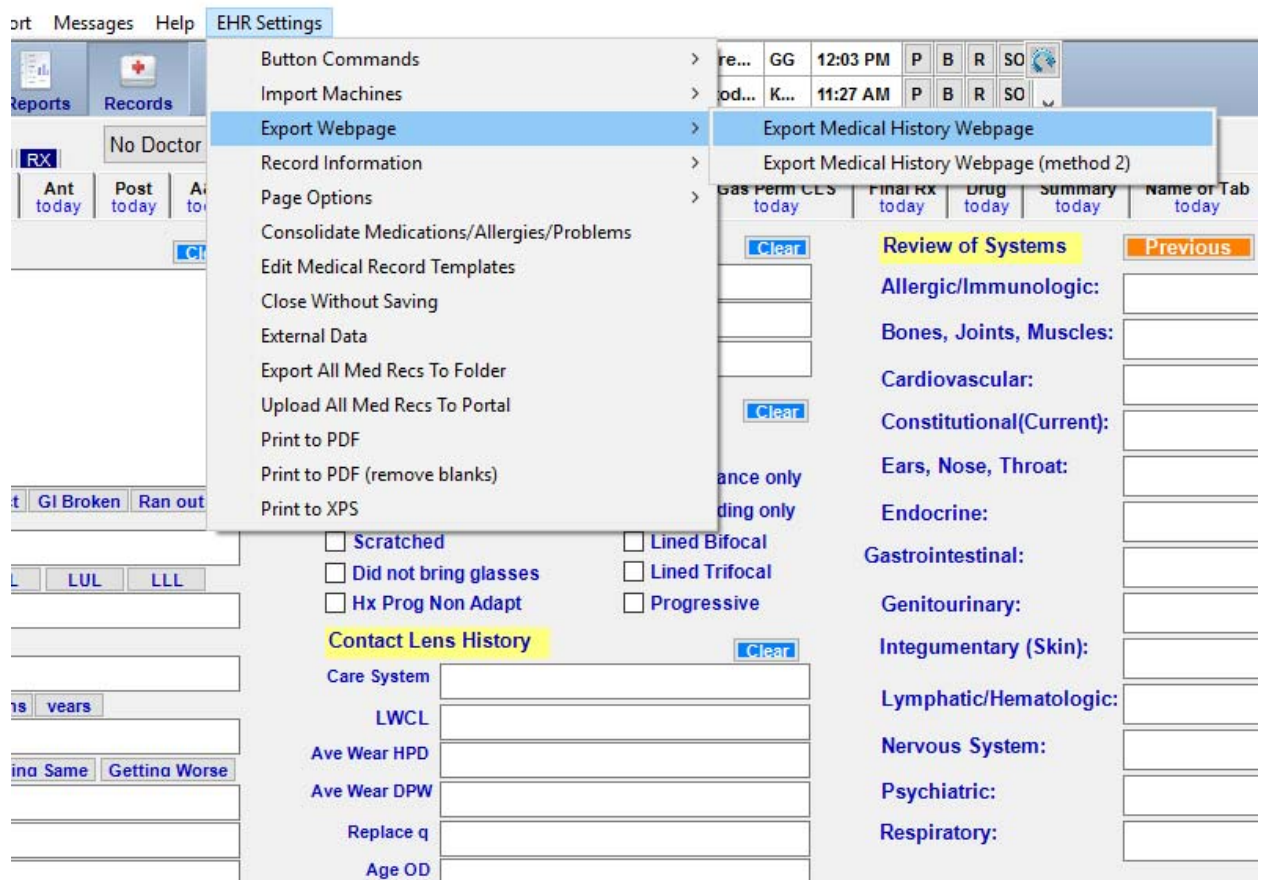
Go to the Records tab in Crystal, then click on the record tab you would like to export. Once you are within that tab, go to EHR settings, then Export Webpage. You will see two options, Export Medical History Webpage, and Export Medical History Webpage (method 2). Click the first one, and then save the file, making sure to add .html to the end of the file name.

You can repeat this if you have multiple record tabs that you would like in your online forms.

At this stage you will start making edits to the HTML files.
Be sure to make a copy of the Patient Webpage file before you begin, as it is easy to make mistakes with the coding.

Open new Patient WebPage file in Notepad.


```
guidenewPat - Notepad
File  Edit  Format  View  Help
<!DOCTYPE html>
<html lang="en">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=ISO-8859-1">
<title>Crystal PM Patient Forms</title>
<script src="https://www.crystalpm.com/jquery.min.js"></script>
<script type="text/javascript" src="https://www.crystalpm.com/tabber.js"></script>
<link rel="stylesheet" href="https://www.crystalpm.com/example.css" TYPE="text/css" MEDIA="screen">
<script type="text/javascript">
document.write('<style type="text/css">.tabber{display:none;}</style>');
</script>
<script type="text/javascript">
var ins_plan_names;
var ins_plan_ids;
function myformLoaded(){
        loadInsPlanData();
        loadInsPlanUI(document.myform.ins1_name, document.myform.ins_plan1_name);
        loadInsPlanUI(document.myform.ins2_name, document.myform.ins_plan2_name);
        loadInsPlanUI(document.myform.ins3_name, document.myform.ins_plan3_name);
        loadInsPlanUI(document.myform.ins4_name, document.myform.ins_plan4_name);
}
function loadInsPlanData(){
        ins_plan_names=new Array();
        ins_plan_ids=new Array();
        ins_plan_names[6]="None,Demographics only".split(',');
        ins_plan_ids[6]="0,151".split(',');
        ins_plan_names[10]="None,w. EHR,wo. EHR".split(',');
        ins_plan_ids[10]="0,84,85".split(',');
        ins_plan_names[11]="None,Access,Alliance,Assist,CSV File,Excel spreedsheet,FoxFire,Grow CMS,Harris computer systems,
        ins_plan_ids[11]="0,122,145,144,135,137,132,120,140,148,124,133,131,119".split(',');
        ins_plan_names[13]="None,1st - 30".split(',');
        ins_plan_ids[13]="0,130".split(',');
        ins_plan_names[22]="None,1,2,3,4,5,6,7,8,9+".split(',');
        ins_plan_ids[22]="0,99,100,101,102,103,104,105,106,107".split(',');
        ins_plan_names[27]="None,with EHR,Without EHR".split(',');
        ins_plan_ids[27]="0,82,83".split(',');
        ins_plan_names[36]="None,Plan 1".split(',');
```
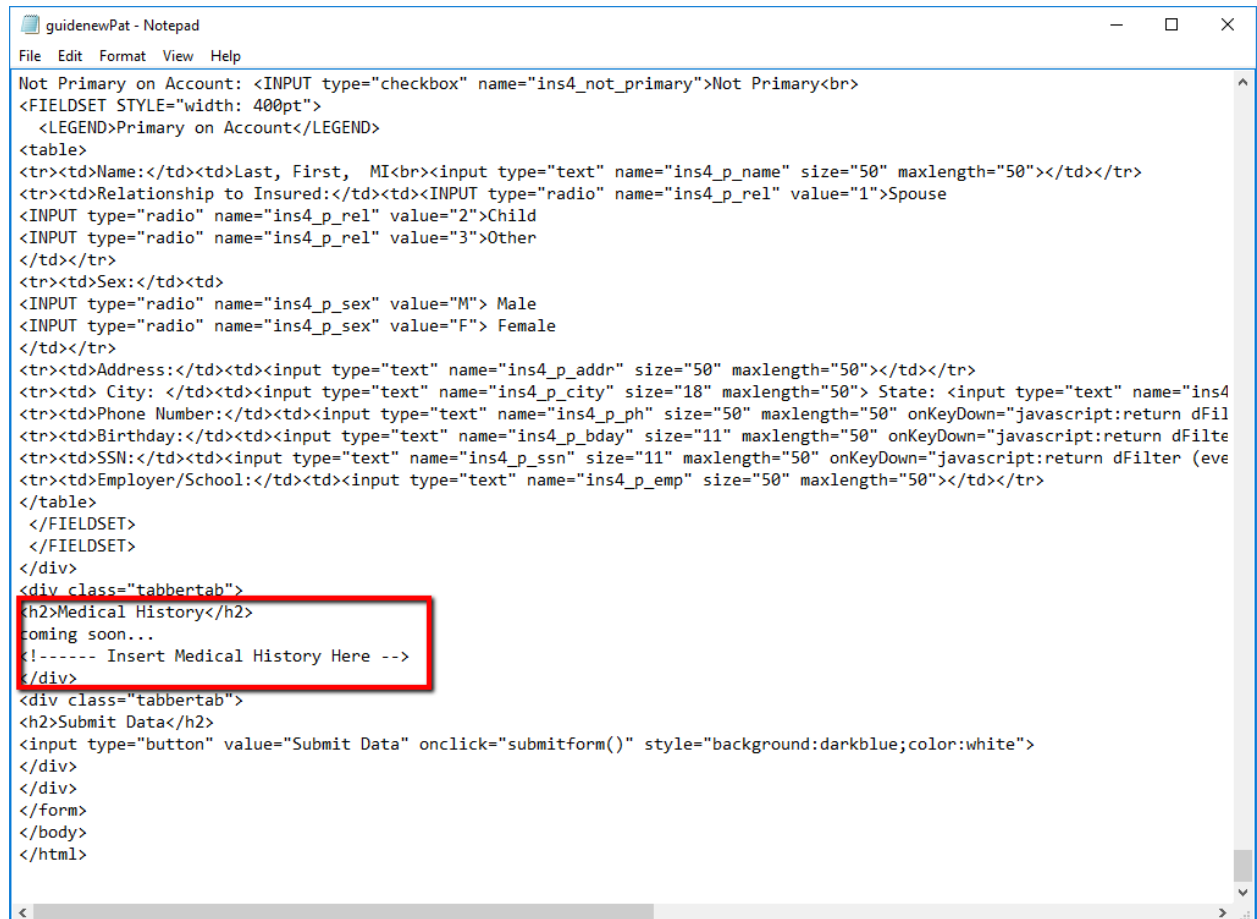
This is the beginning of your online forms. You will not be making any edits here.

When you scroll to the bottom of this file, you will see this section.

This is where you will add your medical history portion of your forms.

Open the Medical History Webpage file(s) in Notepad, right click, and select all. Right click again, and click copy. Once that file is copied, go back into the Patient Webpage (pictured above), and replace the 'coming soon…' and 'Insert Medical History' lines by dragging to select those lines, right clicking, and hitting paste.
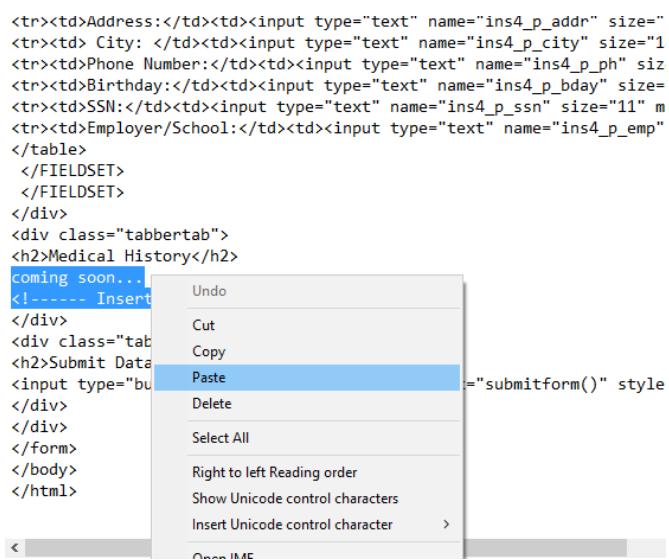
You should now see something similar to the image above.

Checkboxes: Checkboxes start at <INPUT and end at the label. To move the checkbox, highlight the entire code:

<INPUT type="checkbox" name="mc_4441">Glasses Lost

Right click, hit copy, and then backspace to remove the checkbox from the form. Then, scroll to where you would like the checkbox, and paste it there.

Text Box: Text boxes are easier to locate the beginning and end of, as they are clearly labeled with <TEXTAREA and </TEXTAREA>. To move text boxes, highlight everything in between, and follow the same steps as moving a checkbox.

You'll see that there are two numbers within this code, labeled COLS and ROWS. To make the text box longer, increase the number associated with COLS. To add more lines, increase the number in ROWS.

Drop Down Text Boxes: The drop downs are the most complicated in terms of coding. The code for a drop down starts with <table> and doesn't end until you see the first </table>. To move a drop down, be sure to highlight everything in between, including those two "table" markers. The 'options' were imported from your record template, so they are the same as the drop down menu in your Crystal.

Do not edit the name= in any of these fields. That is how the fields in the form link to the fields in the medical record template, and editing that WILL remove the link to the correct field.

Before you are ready to upload, you need to link this file to your Crystal PM ID.

To find your Crystal PM ID, go to Help, then About, and the ID should be at the bottom of the pop up.
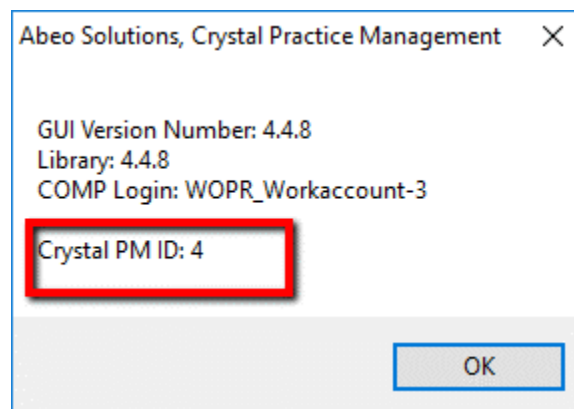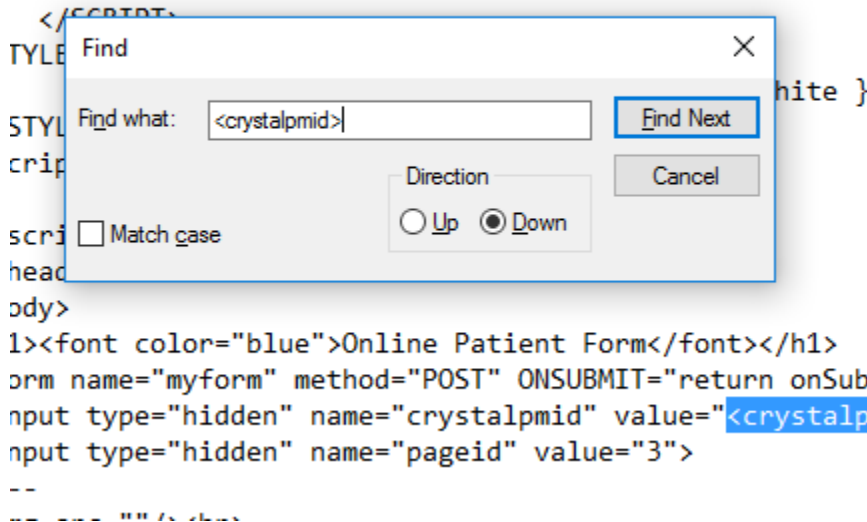
To add this ID number to your file, you need to have it open, and hit Ctrl and F on your keyboard simultaneously. A search bar should pop up. Enter this text in exactly:

<crystalpmid>

Then hit enter. It will find this text, and highlight it.

```
turn false;

</SCRIPT>
TYLE                                                          hite }
Find                                          ×

STYL   Find what:   <crystalpmid>|        Find Next
crip
                        Direction
scri  ☐ Match case      ○ Up  ● Down      Cancel
head
ody>
1><font color="blue">Online Patient Form</font></h1>
orm name="myform" method="POST" ONSUBMIT="return onSubmit(this)'
nput type="hidden" name="crystalpmid" value="<crystalpmid>">
nput type="hidden" name="pageid" value="3">
--
```

Once it is highlighted, exit out of the Find pop up, and hit backspace to delete the highlighted text. Then, enter the Crystal PM ID where the text used to be, in between the quotation marks. The only thing that should be in those quotation marks are the numbers, as any remaining text will cause the form to not link correctly. Once you have finished this, save your changes.

Once you have finished moving fields around to your liking and have saved your changes, go back to Admin- Website, and click the second button, labeled "Upload Patient / Med His Webpage (page 2)". Then, find the Patient Webpage file and choose it to upload. Once the file has uploaded, you will see the words "File has been uploaded" above the link for the online forms. Then, to check that you have uploaded it correctly, click the link, hit 'New Patient Page' and you will see your forms.

If you don't like the way something looks, you can go back and edit the HTML file again, but you will have to re-upload after you've made changes.

Once you've finished these steps, your online forms are ready to be filled out by patients. For any customizations beyond this, you will need to call or email the contact information at the beginning of this guide to request these changes.

Please read below for instructions on how to import these submitted forms into Crystal and how to generate passwords for existing patients to go in and edit information they've already submitted.

<u>Importing Submitted Forms</u>

Double click on the Patient tab in Crystal to bring up the Search for Patient Box.

The Import Patient from Web button is where you will find all of the submitted forms that haven't been imported into Crystal yet. Once you click this button, another box will appear, listing the patients that have finished their forms.

Double click one of these patients, and yet another box will appear, listing all of the information that the patient has submitted in their form.

The boxes at the bottom are how you will import this information. If this form is from a patient already in the Crystal system, click 'Patient Already Exists'. A search for Patient box will appear, and you will choose the patient the form needs to be imported into.

If it is a new patient, click Create Patient, and a new patient profile will be created with the information.
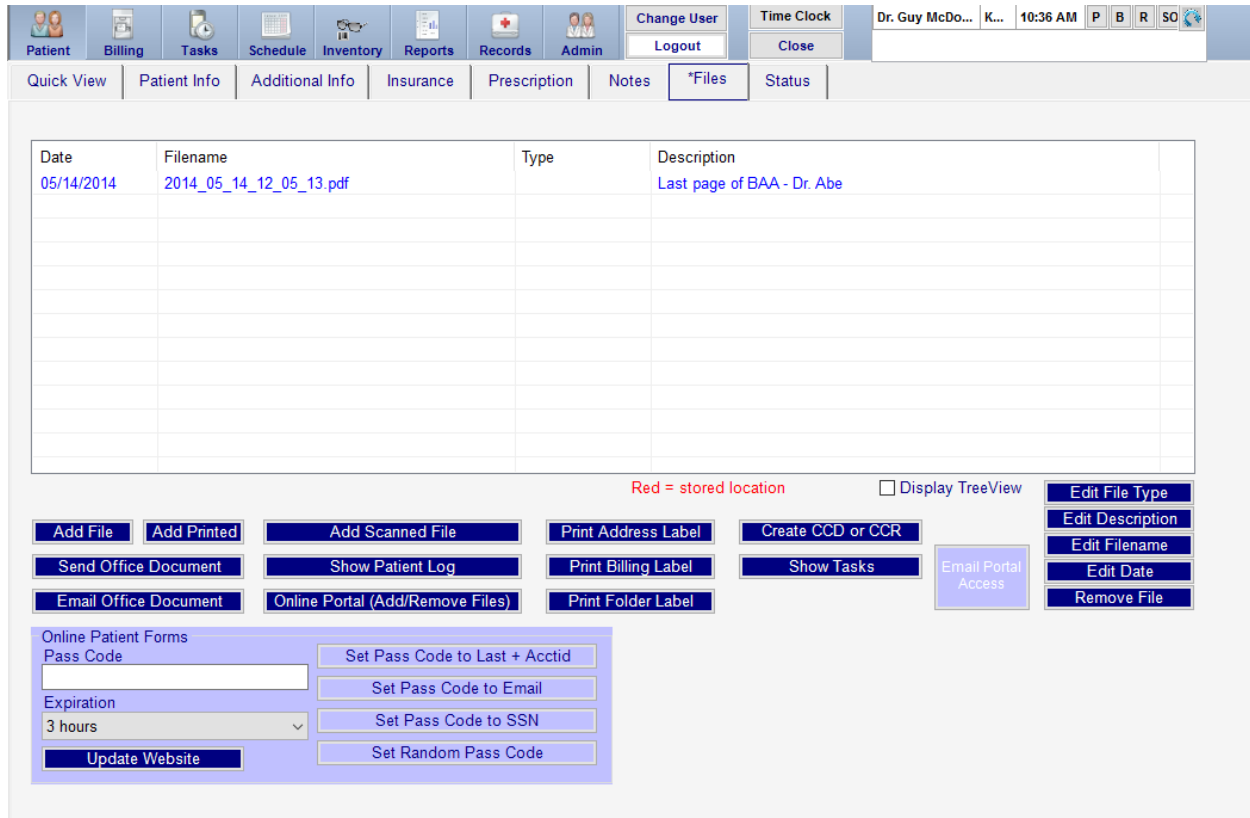
If this patient form is somehow a duplicate, and the information has already been imported into Crystal, you can hit the Delete Patient button and the info will be deleted.

Generating Passwords for Existing Patients

If an existing patient calls to make an appointment, and they have already filled out their medical history, you can generate a password for them to plug in on the online form website so they can edit their records without having to repeat information that's already in Crystal.

To generate a password, go to that patients profile in the Patient tab, then go to Files.

Near the bottom, on the left hand side, you will find a button labeled 'Online Registration Form'. Once you click this, a box will appear.

The buttons on the right side of this box are the different password options. Whichever you choose is completely up to you and the patient. The first will set the password to their last name and their account ID, the second will be the email on file, the third is their social security number, and the last will generate a completely random number passcode. Once you click on one of these options, the generated password will populate in the text box on the left hand side.

Below this text box is where you can choose the expiration for this password. It's recommended that the expiration does not exceed 1 month, for security reasons. Once you have the desired password and expiration, and have given this password to the patient, click "Update Website" to activate the password. This text box will disappear and you will be finished.

Please email any questions/comments/concerns to onlineforms@crystalpm.com