



What Crystal Practice Management offers for online forms when purchased, and with continued Support & Updates:

NOTE: Online forms are a part of support and updates.

Requirements:

- 1.) Each office must decide on a medical record template to use. This can be changed in the future, but the online forms **MUST** mirror the current medical record template. If the medical record is changed in the future, the online forms may have to be completely redone.
- 2.) Any tabs in the medical record template that are going to be created for the online forms **MUST** be 100% complete before online forms can be created.
- 3.) It is **HIGHLY RECOMMENDED** that offices go live **BEFORE** having online forms created. The reason for this is that going live gives the office a chance to test their medical record template and make **SURE** it is the one they decide to keep.

Online Forms Creation:

- 1.) We work with a standardized template - We try to make this simple but attractive, and (depending on the complexity of the office's requests) a reasonable length in order not to discourage patients from filling out the forms.
- 2.) We do reasonable amounts of editing - This means that we will work up a first draft and then we can go back and revise any adjustments according to the office's needs. We are always willing to make small edits when an office needs them, meaning that if an office makes an edit to their medical record template, they may send us an email requesting the edit be reflected on the online forms.
- 3.) We are able to do basic editing, such as rewording or reformatting, changing fonts and colors, and adding images or logos. Due to the amount of requests for online forms, any edits beyond this may require a fee or you may contact your third party web developer to make these changes.
- 4.) Time to completion. We take online form requests as they are received. We cannot put any office ahead of any other office due to the nature and process of online form creation. We always try to give an ETA on completion of the forms.
- 5.) The creation of the online forms using standard medical history information is included within the cost of support and updates. If an office has Crystal create their online forms, then decides to change

their Medical Record template and needs them redone, a fee will be charged depending on the amount of time needed to recreate the online forms. If the office would like additional tabs added to the forms after they have been finished, this may also require payment depending on the complexity and size of the tab. The amount to be charged will be discussed before any modifications are made.

Please email onlineforms@crystalpm.com with any online forms requests or questions.

Please include the name of the doctor and your CrystalPM ID number, which can be found by going to Help and About in Crystal, along with a description of what information you'd like included within your forms. To expedite the process, please include the two files needed to build your forms as an attachment in your request email. Instructions on how to create these two files are at the bottom of this list.

Template Backup:

1. In Crystal, click on the EHR menu
2. Click on "Import templates/med rec utility"
3. Click the big blue button titled "Backup existing templates", then save the file.

New Patient WebPage:

1. In Crystal, click on the Patient tab, and open any patient
2. Click on "Import / Export"
3. Click "Export New Patient WebPage", then save the file.