

Forms Remote and simplifyMD Website Review

Goals for new users and Office Manager:

- 1) know where to find and how to use: Guides, Videos, Template Library on our website..
- 2) know how to create basic templates in the future and how to edit the complementary templates that were done by simplifyMD during installation phase

Prep:

- 1) have simplifyMD **website** up
- 2) have **Forms Guide** open in PDF version
- 3) have **example templates** available
- 4) have clients **Cloud Application** up
- 5) have at least **one example template loaded** (a Progress Note which has Pulse, Allergy, Clinical History, and Fam/Social Hx merge tags) into the Cloud Application (it will be blank & we are not going to use Training Virtual any longer) – to be able and “show” template use , before creating a template with client., associate the Template as a “Chart Note & also to Check In and Check Out”
- 6) have at least one user specific “**Test**” **Chart** made, with an appointment for that “Test” Patient

Outline (60 minutes)

A) simplifyMD **website** review (**10 minutes**)

- 1) repeat what you show in Kick Off Call – how to log into website using clients owner id
- 2) show User Guides (Basic, Advanced, Admin Set Up, eRx, Forms)
- 3) show training videos (System Overview and Scanning)
- 4) show training agendas
- 5) show training power points
- 6) show supplemental Meaningful Use info
- 7) show eRx supplemental info
- 8) show Template Library

B) **Template training** (go big picture first → then to smaller details) (**20 minutes**)

- 1) show “**Tools**” **Tab’s** “Office Documents” → “Manage Templates”
 - a) three top functions/bars “Upload a template to the system” , “Create a new template” , View Rules about Templates
 - b) In “Manage Templates”, open the example/source Template and look at the Barcode in 3 of 9 Font and Arial Font
 - c) In “Manage Templates”, may want to look in an established clients application and show that columns all sort, review each column – emphasizing “Open to Edit Source” (MS Word docx) verses “Open to Edit Merge Tags,(HTML – Fax Cover Sheet example) “Actions” (rename and refile), Check In and Check Out Labels, and Restrictions.
- 2) To “**Schedule**” **Tab**: 1) show “Action” column’s a) “Print Forms” drop down b) Check In & c) Check Out
- 3) To the user’s **Test Chart** (Face Sheet review)
 - a) add to widgets: a Pulse, an Allergy, an item or two in Clinical History, an item or two in Socia/Fam Hx
 - b) To Chart Tab
 - c) to “T” Button
 - d) click “”Edit to Add to Chart” on the desired template
 - e) open header and show the activated Barcode (verifying that Template/File Name is short enough – to ensure Barcode does not wrap to a second line)
 - f) show that the Pulse , Allergy, Clinical History, and Social and Family History data MERGES onto Template
 - g) show saving a Template back to the chart as BOTH MS Word (via “Save” when NewDAV working) (review “open to edit”) and PDF version (via “Simple Print”) (review “open to read”)
- 4) **IF** “s:” drive is already * mapped and barcode 3 of 9 font installed & we can print the barcoded Template and scan back to the Filing Center (* Forms class goes “early” in the installation)
 - a) show how the barcode auto populates Name and Chart Tab in the Filing Center (this completes the topic of Templates & most importantly the advantage of using Barcodes
- 5) **Do** “hands on” - the attached **Template Creation Practical (30 minutes)** (Print for long term reference , breaks down the 39 page Forms Guide for quick use.

Template Creation Practice (30 minutes)

Goal: The practical below (Quick Guide), combined with using our 39 page Forms Guide as needed – should:

- 1) enable your Practice to **edit** your new templates we are creating for you, if desired
- 2) enable your Practice to **create** new templates you may desire in the future.

To turn a “Form” into a “Template”	Forms Guide MS Word 2010	Forms Guide MS Word 2007
1) add “Developer” tab to the MS Word Ribbon , via :”Word Options”	7	8
2) “Page Layout” tab: a) Margins to 0.5 “ b) Orientation to “Portrait” (normally)	n/a	n/a
3) “Home” tab: a) “Line Spacing” from 1.15 to 1.0 b) “Line Spacing Options” “Spacing” “After” from “10” pt to “0” pt	n/a	n/a
4) From “Paragraph” tab - turn on “Show/Hide formatting symbols & turn on “View Gridlines”	8 & 9	10
5) Chose font (often Arial 10 or 8 point font – depending upon amount of data on form) ** then run paragraph returns all the way down the page	n/a	n/a
6) Insert Header	11	12
7) in header type in a 20 to 24 point font arial \$[[BC_WNAME]] then change it to barcode 3 of 9 font (the barcode – ***which will route the form to correct patients chart and chart tab. *** On multiple page Templates - can ONLY have a Barcode on FIRST PAGE - so it scans back as ONE three page doc vice three one page docs	12	13
8) in header make a table 4 x 1 , enter Title & then commonly desired Merge Tags – such as :Name: \$[[FN]] , DOB: \$[[DOB]] , Acct #: \$[[PID]] , and Date: \$[[TODAY]] ,(then remove borders)	14	15
9) PLAN – A) how you will document on the Template: a) print and write on it (example patient check in packet) b) type or ink on it c) dictate on the document B) based on content, what format the template will need: a) underlying Table(s) b) ,drop down lists, c) active x check boxes verses simple symbol boxes OR a combination of all three.	10	11
10) Make a Table & remove some of the borders (example- top, right and left) = creating for example a “static line” = being the bottom boarder which can be typed on and now won’t move. (Example a Signature and Date line). Review Boarders “None” verses “Preview”, and Apply to: “Table” verses “Cell”	15	16
11) make a drop down list (all items/choices in the list need to be standard – won’t be editable)	24	
12) make an Active x check box, Legacy check box, and symbol boxes look at file sizes related to many.... active x check boxes ** we would like to keep all template file sizes below 100 KB , and certainly below 500 KB = to ensure the Template opens , saves, and closes briskly.	23&22	23
13) add some content to the template – to include Pulse , Allergy, Clinical History, and Social and Family History Merge Tags	25	24
13) upload our new Template , test Barcode, test Merge Tags – in our Test Chart	28	27
14) IF TIME - make a quick 6 by 6 table (mimic a flow sheet) and copy it into Tools → Manage Templates as HTML and add a copy to the Test Patients chart	29	28