

Patient Portal

How to send patient forms and import them to your IMS

How to send patient forms

1. Schedule an appointment for the patient.

2. Go to IMS>Scheduler

While scheduling make sure that the patient's email address is there an email address is much required and this is the address where you are going to send patient forms and their login credentials.

3. After verifying it, click on **Ok** .

4. A new window will pop up which will ask you to select the form/forms which you want to send at patient's email address.

5. Just select the form and click on **Email** and this will sent the form at patient's email id.

(A message will pop up saying" Email sent successfully".)

6. .Now ask the patient to check their email id and they would receive patient form links which contains patient form. Now the patient will be able to fill up the required form.

Patient forms

1. It contains several pages which the patient is going to filled it up.

2. It will welcome the patient and then patient starts filling up the form

3. On the page, patient will be able to see some buttons like

- Select the page

- Go to

- Previous

- Next

- Last

- Finish

4. patient can use this buttons for their help

5. On the last page, patient needs to click on Finish and it completes the filling up of the forms and a thank you page will come up.

6. It will give you two option as Review and Logout.

7. You can either review the form or logout.

Clicking on logout means the patient has filled up the form and now it needs to be imported at your clinic.

(Note: The patient can make any changes in this form till the form gets imported and once the form gets imported, the patient cannot make any changes in the form and the link will get in deactivated)

How to import the patient forms at your IMS

1. Go to **IMS>Utilities>patient portal>Form Import.**
2. Click on form import.
3. Form import window will pop up.
4. In this window you need to retrieve the patient form and for that you have to select the date range in which the appointment for the patient has been scheduled.
5. After selecting the date range, click on retrieve.
6. You will be able to see multiple lists of the patient whose appointment date falls within the date range.
7. click on the check box before the name of the patient at left panel.
8. When you will select the patient, all the pages filled by the patient can be seen at left panel
9. Click on **Import** and now it will import the forms at your IMS. Everything that patient has filled up will be translated at Visit note in IMS.
10. Go to Visit note to verify it.

How to make patient forms and map them to visit note

How to make forms

1. Open the admin panel of your patient portal
2. Type patient portal website/admin at your browser address
Example- <http://sp.meditab.com/admin>
3. This will open admin panel and go to patient forms column

4. Click on form pages and this would open an interface where you can click on add form page.
5. Now after clicking on add form page, a new window will open up where you can put title and subtitle.
6. Enter the title and subtitle and put the sequence number.
7. Click on save and it will create a new form page.

(*Sequence number means the numbering on which you want to see the page)

How to add questions into this form

Parent question

1. Open the admin panel of your patient portal
2. Type patient portal website/admin at your browser address
Example-<http://sp.meditab.com/admin>
3. This will open admin panel and go to patient forms column
4. click on Questions and a new window will pop up
5. Click on add questions
6. Now a new window will pop up and it will say select the page in which you want to keep this question
7. Write the question in the text box and customize it.
8. To customize the question what you can do is
 - Go to below panels and select does it have any sub question-----YES/NO
 - Sublevel selection-----single/Multiple/None
 - Control Type----- e.g Check box, Radio button, textbox, textarea, YesNo, Yes[G] No[R], etc.
 - Control placement-----Before question/ After question/ NextLine
- 9 . Hit save _

Child question/ Subquestion

1. On questions window panel, you get a button of **plus sign** which is placed at just before the parent question and this says "add subquestion".
2. Click on button and it will take you to new window where you can add subquestion.
3. Type the question in the text box and click on save.
4. If you want to add multiple subquestion for the same parent question, then click on save and add another for same parent.
5. You can also save some space by dividing the subquestion into columns
6. For that go to property of the parent question i.e just click on edit at parent question and at subquestion_formatting , select the number of columns

How to map forms to your visit note

1. Go to **IMS>Utilities>Patient portal>Mapping**.
2. Question mapping window will pop up and it is divided into two parts as Portal and IMS.
3. At portal we can select the form and the page. This will bring all the questions that are added in that page and it will directly come from patient portal.
4. On the IMS part, question will come from visit note.
5. For mapping, select the question from left hand side(Portal) and similar question from right hand side(IMS) and then just click on **Link**.
6. It is a very simple step but for that the question at portal should be similar to the question at IMS.