

Medisoft Mobile Startup Guide Release 3.2



December 2019

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Chapter 1 - Setup and Features

Overview

Medisoft Mobile enables you to connect to your practice from anywhere. With this application, you can

- View patients and appointments
- Create, edit, and delete appointments
- Search for patients
- Have patients enter or verify/correct their demographic data
- Quickly add patients to your practice
- Send charges to Medisoft for review and posting
- Update and add superbill templates

In this guide

In this guide, you will find instructions for

- Downloading and installing the app
- Configuring the app for your practice
- Features of the app
- Customizing forms for patient intake

Security

eMDs' Mobile Application utilizes HIPAA compliant data transmission safeguards, such as encryption and authentication for all Mobile Application connections and communication to secure and maintain confidentiality of data.

System requirements

This feature is for Medisoft 22 and newer.

Android

The following Android devices are supported:

- Android Tablet with Display dimensions of 9.5 inches or greater
- Minimum of 1280 x 800 resolution

Android phone is NOT supported.

The following operating systems are supported:

7.x and newer

Apple

iPad

The Patient Intake feature is supported on iPad's with display dimensions of 9.5 inches or greater.

- iOS 12 and newer

iPhone

- iOS12 and newer

You cannot perform patient intake on an iPhone.

Firewall Considerations

For mobile 3.x apps, the Medisoft server and the mobile devices must be able to connect outbound to mslconnect.emds.com (23.99.212.20) on TCP port 443 (HTTPS). No inbound connections are made to the Medisoft server.

You can test connectivity by entering the following URL in a web browser running on your server:
<https://mslconnect.emds.com/connectiontest>

If you see a message "You have successfully connected to MSLConnect," then your server meets the connectivity requirements for the mobile app.

Other Considerations

- You may wish to turn OFF auto-correct spelling if it is on your device. This will prevent unwanted changes as names and other words are entered.
- You may wish to turn OFF Smart Punctuation if it is on your device. This will prevent periods and other punctuation from automatically being applied to data entry.
- You may also wish to turn ON "Guided Access" in the iPad settings to keep the iPad in a single app. You can then triple-click the Home button to lock-in the app you wish to use so patients cannot roam around your device.
- You should require a password to operate your iPad or iPhone and turn-on "Find my iPad" or "Find my iPhone".
- Split screen is not supported for Medisoft Mobile.

Downloading and installing the app

To download and install:

If you are using...	then...
iPhone or iPad	From the App Store, search for and install Medisoft Mobile.
Android Tablet	From the Google Play Store, search for and install Medisoft mobile.

When the app is installed, you will see this icon on your device's screen:

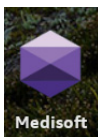


Figure 1. Medisoft icon

Figure 2.

Installation and configuration--new users

The mobile service for 3.2 requires .NET 4.5.2 or newer. If it is not already installed on your server, it will be installed with your core application.

1. Start Medisoft on your desktop and open your practice.
2. Set up users and user security for each user.
3. On the Tools menu, select Services > Mobile Interface Configuration. The Mobile Configuration screen appears.
4. Click the **Enable** button.
5. Take note of the values for API Key and API Code.
6. With your mobile device, launch the Google Play or App Store.
7. Search for Medisoft.
8. Download and install the application.
9. On the mobile device desktop, tap the mobile application. The application starts.
10. Enter the API Key and API Code that you noted.
11. Tap Save. The application will connect to your practice data.
12. Log in to your practice using your User ID and Password.

If you do not have a mobile PIN entered in Medisoft core for the user you are logged in with, you will be prompted to enter a mobile PIN.

To add another practice

If you have more than one practice, follow this procedure to add another practice.

1. Start Medisoft or on your desktop and open your practice.
2. On the Tools menu, select Services > Mobile Interface Configuration. The Mobile Configuration screen appears.
3. Click the **Enable** button.
4. Take note of the API Key and API Code. These will be different for each practice.
5. Launch the mobile application.
6. Tap Add.
7. Enter the API Key and Code that you noted.
8. Tap Save.

Logging in on the Mobile device

To log in:

1. Enter your Medisoft login User Name and Password in the fields.
2. Tap **Login**.

Logging out

To log out:

1. Tap the Logout icon in the top right.



Features

Note: screen captures below are from Apple devices.

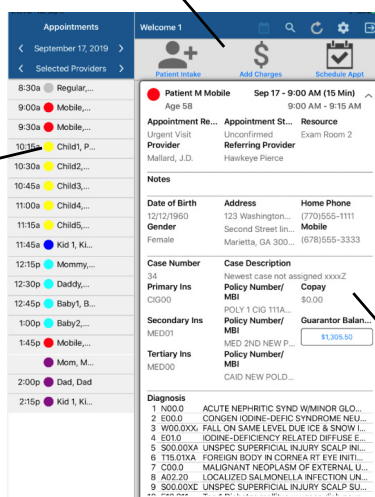
Home Screen

The Home screen shows you the list of appointments for the selected day, as well as details for a selected patient and icons for using the application.

Also, use the buttons to perform a Patient Intake, send Charges, or add an appointment.

Use the icon bar to see a weekly appointment view, search for and add patients, edit superbills, and update settings.

Use the Appointment section to see existing appointments. select a day for appointments, or select a provider.



Use the Details section (patient card) to see details of a patient's record.

Figure 3. Home screen

Appointment and patient viewing

You can view a list of appointments for a provider or providers.

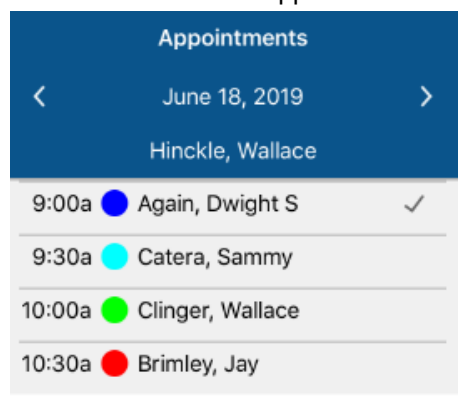


Figure 4. Appointment screen

These appointments are color-coded (for Reason), and icons indicate if the patient has completed a patient intake (see [“Patient Intake” on page 18](#), for more information) or charges have been sent to the core application (for more information, see [“Send charges” on page 21](#)).



Figure 5. Appointments with check marks for Patient Intake and Sent Charges

Icon	Description
	This icon shows you if patient intake was completed for the patient.
	This icon shows you if charges have been sent to the core product for the appointment.

Changing dates

To change the date for the appointments you are viewing, you can tap the right and left arrow buttons to the side of the date; or you can tap the date itself to open a date picker calendar.

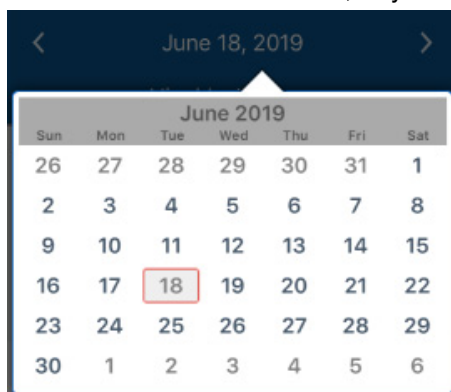


Figure 6. Date picker

Viewing details on the Patient Card

Tap an appointment to open the patient card in the viewer.



Figure 7. Patient card (collapsed)

Tap the down arrow on the right to see the full detail for the patient.

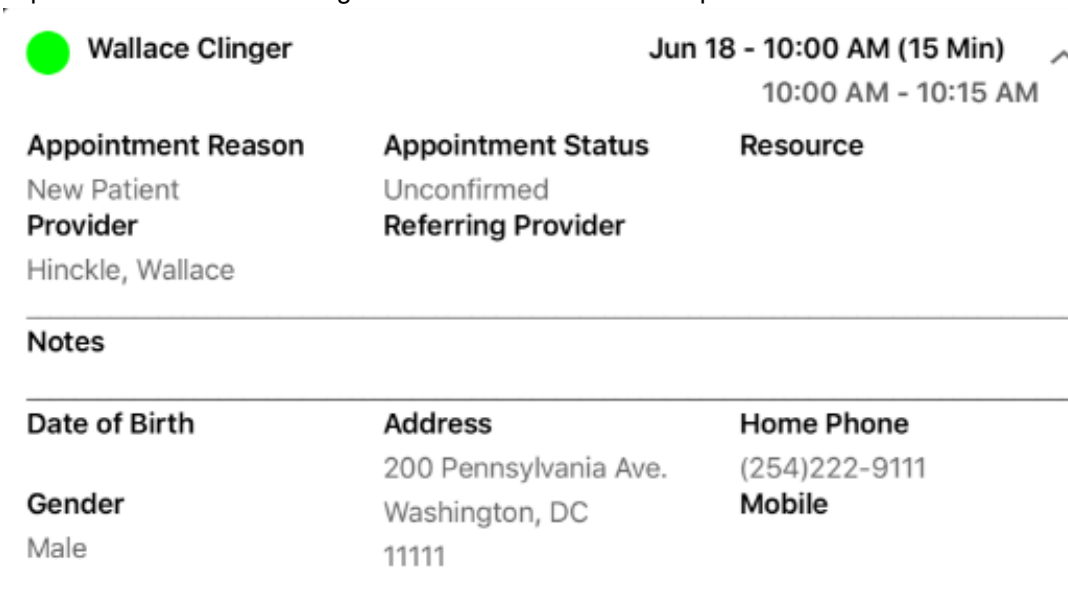


Figure 8. Patient card (expanded)

Weekly Appointment view

You can see appointments for an entire week by tapping the Weekly View icon  in the icon bar at the top of the screen. This will open the weekly appointment view.

January

Done

<

Sunday 20

Monday 21

Tuesday 22

Wednesday 23

Thursday 24

Friday 25

Satur...y 26

>

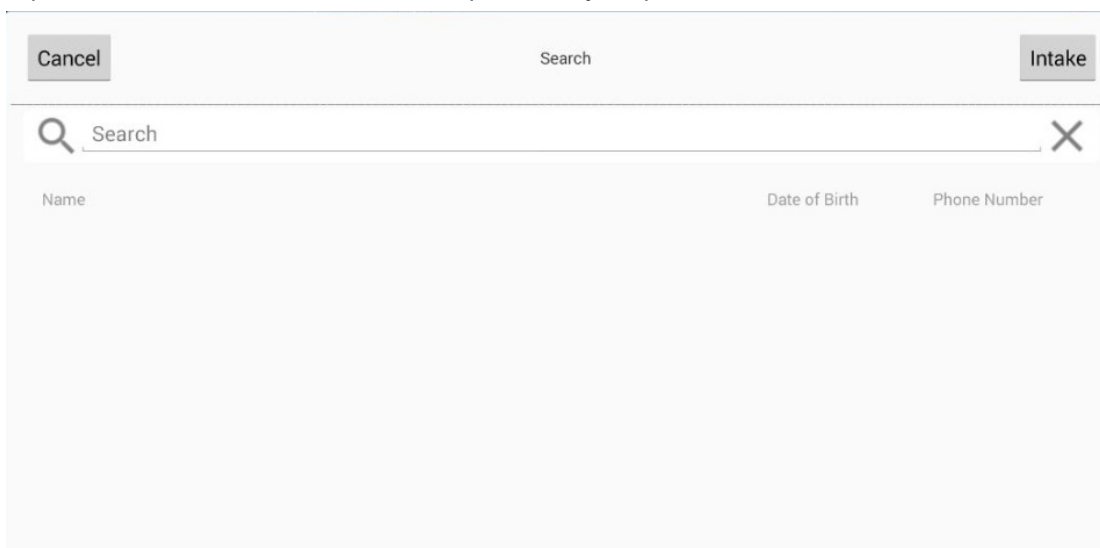
9:00	Lyashtuck, Steve					
10:00	Pfau, Sara Lee					
10:30	Caesar, Jay					
11:00	Conner, Phil					
11:30	Smith, Alison					

Figure 9. Weekly view

You can change the week shown by tapping the arrow buttons. To view appointment details, tap the appointment.

Patient Search

Tap the Search icon  to search for a patient in your practice.



Cancel
Search
Intake





Name	Date of Birth	Phone Number
------	---------------	--------------

Figure 10. Patient Search screen

Note: If Quick Add is Off, you will see the Intake button; if it is On, you will see the Patient Add button. See [“Patient Quick Add” on page 22](#) for more information.

Phone Dialer

You can call a patient using the Medisoft Mobile app. You can launch the phone dialer from three screens:

- Appointments
- Charges
- Review Charges

Note: this feature is available only on iPhone.

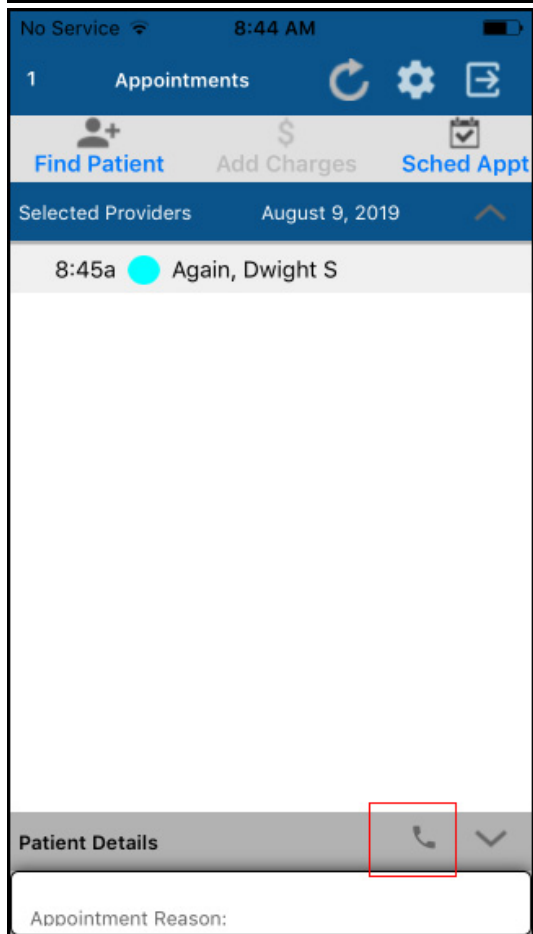


Figure 11. Appointments screen

Phone Dialer screen

The Phone Dialer screen is launch when you tap the phone icon on the Appointments, Charges, or Review Charges screen. Tap the phone number to make a call to the selected patient.

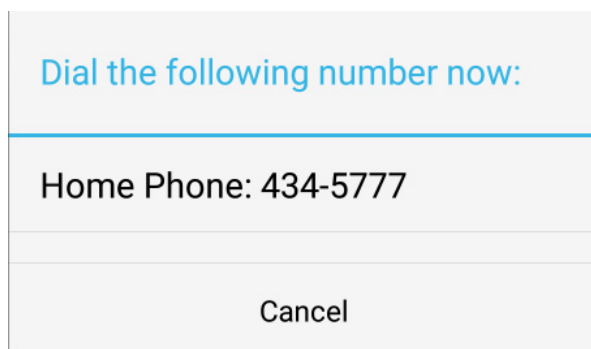


Figure 12. Phone Dialer screen

Scheduling an Appointment

You can add appointments to a schedule. To begin, tap the Schedule Appt button. This will open the Schedule screen.

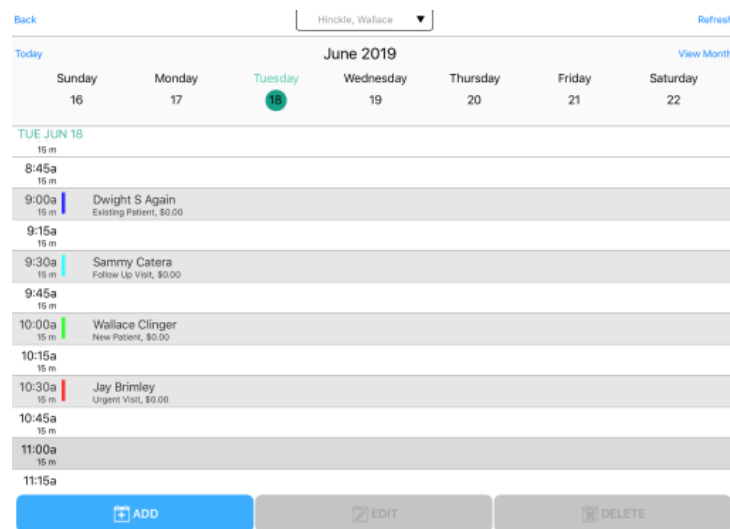


Figure 13. Schedule screen

Tap Select Provider or the Provider name at the top to select a particular provider. If a provider was already selected on the home screen, that provider will already be selected on this screen. If more than one is selected, tap to select a particular provider. After this, when more than one provider is selected on the home screen, this field will default to the last provider selected on this screen.

The display will default to the weekly view but you can tap the View Month button to see an entire month.

Tap a day on the weekly calendar strip to select a different day. You can also tap the Today button to select the current day.

Below you will see the current schedule for the selected day, showing the appointments and information about each patient for that provider.

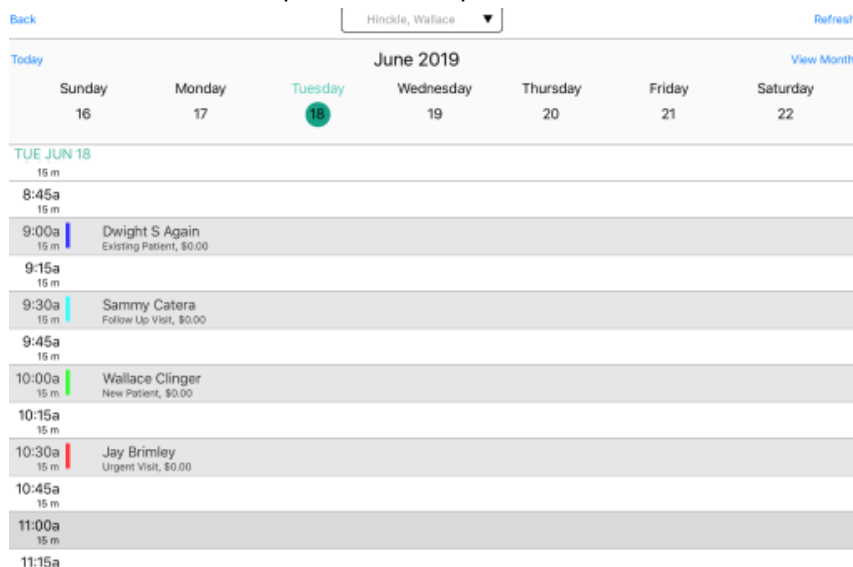


Figure 14. Schedule view

Eligibility Status

Eligibility status is shown by icons to the left of the patient name. The table below describes each icon:

Icon	Status
no icon	No eligibility request verified
 Green flag	Active
 Red X	Inactive
 Yellow icon	Unsuccessful or no verification

To add an appointment, select the appointment slot and tap the Add Appointment button. A screen appears that allows you to add or find the patient.

Figure 15. Find Patient screen

After entering the patient's name or part of the patient's name, tap the magnifying glass (search) icon or tap <Return> to begin the search.

New Appointment screen

Once you've selected the patient, you can enter the appointment details. All of the fields are editable.

Figure 16. New Appointment screen

Selecting a Case is available only in Medisoft Mobile 3.2 with Medisoft 24 and newer. When you tap to select a case, Select a Case screen opens. Here you can select a case. You can select a closed case as well since you can select a closed case for an appointment in Medisoft core.

Cancel Case Show Closed Cases

Number	Case Description
5	Rash
-1	{None}

Figure 17. Case Select screen

The Show closed cases toggle button will be off unless you are in a screen where a closed case had been previously selected.

Tap Save to add the appointment to the schedule. The appointment appears on the schedule.

Back Hindale, Wallace Refresh

Today June 2019 View Month

Sunday 16 Monday 17 Tuesday 18 Wednesday 19 Thursday 20 Friday 21 Saturday 22

TUE JUN 18 15 m

8:45a 15 m

9:00a 15 m Dwight S Again Existing Patient, \$0.00

9:15a 15 m

9:30a 15 m Sammy Catera Follow Up Visit, \$0.00

9:45a 15 m

10:00a 15 m Wallace Clinger New Patient, \$0.00

10:15a 15 m

10:30a 15 m Jay Brimley Urgent Visit, \$0.00

10:45a 15 m

11:00a 15 m Jeremy Wagnew Routine Check Up, \$0.00

11:15a 15 m

Figure 18. Appointment screen

Longer appointments

Appointment that are longer than the default appointment slot length will appear in gray.

Appointment length is shown by the time below the appointment time.

Visit reason is indicated by the color in the bar to the right of the appointment time.

Time	Duration	Patient Name	Visit Reason
10:00a	15 m	Susan Brimley	Urgent Visit, \$0.00
10:15a	15 m		
10:30a	15 m	Wallace Clinger	Urgent Visit, \$0.00
10:45a	15 m		
11:00a	15 m	Charles Gooding	Follow Up Visit, \$0.00
11:15a	15 m		
11:30a	1 h	James Doogan	Medicare Patients, \$0.00
11:45a	15 m		
12:00p	15 m		
12:15p	15 m		
12:30p	15 m		
12:45p	15 m		

Add Appointment

Figure 19. Appointments screen

Double-bookings

Double-bookings appear in the same slot.

Both appointments
appear in the 9:30
slot.

Appointment length
appears on the left
under the appointment
time.

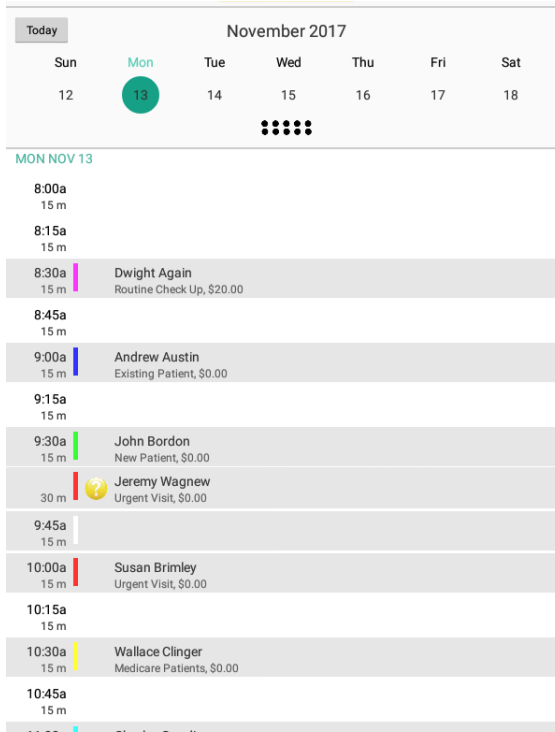


Figure 20. Appointment screen

Editing appointments

You can edit an existing single appointment using Medisoft mobile. To do so, tap the appointment you want to edit and then tap Edit at the bottom of the screen. Once you have made your changes, tap Save.

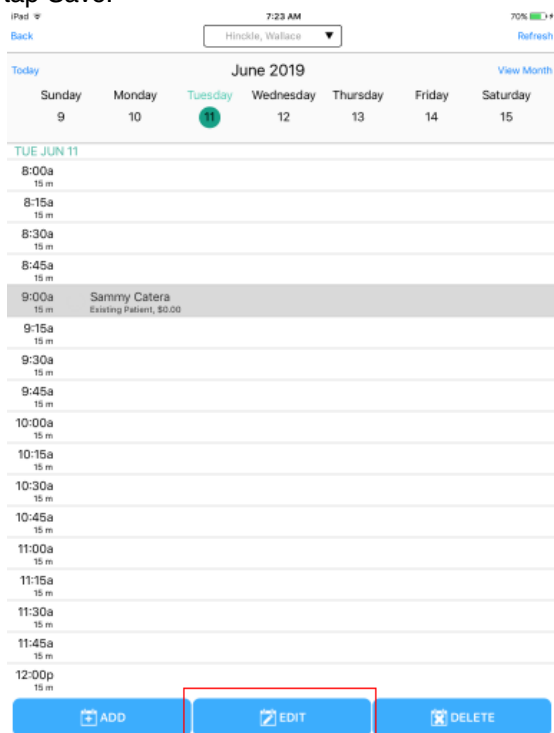


Figure 21. Appointments screen

Limitations

There are several limitations on editing appointments.

- You cannot edit repeating appointments in the Mobile app.
- You cannot edit an appointment that is already opened by another user.
- You cannot edit and save an appointment that has been changed in the core application since you selected it in the Mobile app.

Deleting appointments.

You can delete an existing single appointment using Medisoft. Simply tap the appointment you want to delete and then tap the Delete button at the bottom of the screen. At the confirmation, tap Yes.

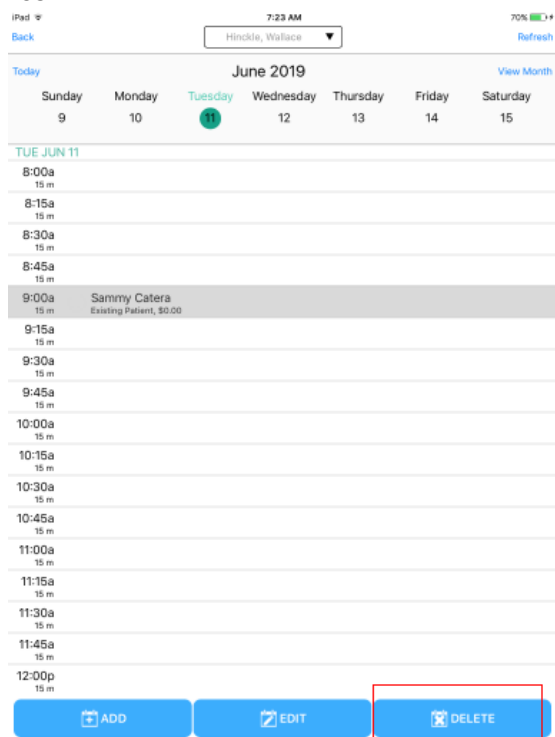


Figure 22. Appointment screen

Patient Intake

You can have patients enter their demographic data and send it to your core Medisoft application, quickly updating the patient's chart. Tap Patient Intake to start the process.

The screenshot shows a mobile application interface for patient intake. On the left is a sidebar menu with the following items: Patient Information (selected), Employment, Payment Responsibility, Emergency Contact, Insurance, Medical History, Forms & Signatures, and Finish. The main area contains a series of prompts and input fields. It starts with a welcome message: "Hello and welcome. I will be asking you some questions to help fill in the information we require." followed by the question "Can you please tell us your full name?". Below this are three input fields for "First Name" (containing "Steve"), "Middle" (containing "Name or Initial"), and "Last Name" (containing "Lyashtuck"). The next question is "What is your address?", followed by an input field for "My address is" (containing "123 Bradford Wav"). The status bar at the top shows 36% battery and 11:08. The bottom of the screen shows standard Android navigation icons.

Figure 23. Patient Intake screen

Note: the Patient Intake button will not appear on the Home screen if you have set Quick-Add to On.

Several steps in the patient intake process allow the patient to enter basic demographic data, employer information, insurance, and medical history.

This image is a close-up of the sidebar menu from the Patient Intake screen. It lists the following options from top to bottom: Patient Information (with a person icon), Employment (with a briefcase icon), Payment Responsibility (with a dollar sign icon), Emergency Contact (with a phone icon), Insurance (with an umbrella icon), Medical History (with a clipboard icon), Forms & Signatures (with a pencil icon), and Finish (with a checkmark icon). The "Patient Information" option is currently selected, indicated by a white arrow pointing to it.

Figure 24. Patient Intake menu

In addition, you can customize certain forms for your practice's needs. For more information, see [“General Guidelines for Customizable Forms for Patient Intake” on page 31](#).

Performing a patient intake

New Patient

Follow these steps to perform a patient intake:

1. Start the Medisoft Mobile app on the device.
2. Tap the Search icon in the toolbar.
3. Tap the intake button. You are ready to hand the device to the patient when the screen looks like this.

Figure 25. Patient Intake

4. Give the device to the patient.
5. When the patient has completed the Patient Intake and returns the device back to you, verify that the screen looks like this: If not, the patient has not yet tapped I am Finished:

Figure 26. Patient Intake

6. Enter your Username and Password.
7. If you want to save the patient's information and send it to Medisoft, make sure that Save Patient Intake is On (green).
8. Tap Login.
9. Use Pending Patients in Medisoft for reviewing and updating the patient record in Medisoft.

Updating a patient record

Follow these steps to perform a patient intake:

1. Start the Medisoft Mobile app on the device.
2. Search for and select a patient or choose the patient from the schedule.
3. Tap Patient Intake. You are ready to hand the device to the patient when the screen looks like this.

Figure 27. Patient Intake

4. Give the device to the patient.
5. When the patient has completed the Patient Intake and returns the device back to you, verify that the screen looks like this: If not, the patient has not yet tapped I am Finished:

Figure 28. Patient Intake

6. Enter your Username and Password.
7. If you want to save the patient's information and send it to Medisoft, make sure that Save Patient Intake is On (green).
8. Tap Login.
9. Use Pending Patients in Medisoft for updating the patient record in Medisoft.

Send charges

You can send charges to Medisoft. These charges will appear in the Unprocessed Transactions screen.

With a patient selected, tap Add Charges. The Enter Charges screen appears.

The screenshot shows the 'Enter Charges' screen on an iPad. At the top, there's a status bar with 'iPad', signal strength, time '8:24 AM', and battery level '90%'. Below the status bar, there's a 'Back' button and a 'Superbill-Mallard' label. To the right are 'Clear' and 'Submit' buttons. The main content area is divided into two columns. The left column contains patient information: Date of Service (08/09/2019 08:45), Patient (Again, Dwight S), Address (1742 N. 83rd Ave., Phoenix, AZ 85021), Phone (434-5777), DOB (03/30/1932 Age 87 Sex Male), and Appt Reason (Follow Up Visit). The right column contains insurance and provider information: Insurance (Aetna), Copay (\$0.00), Guarantor Balance (\$0.00), Referring Provider (Hinckle, Wallace), Facility, and Case (25 - Broken Hand). Below this information are two tables for selecting office visit types. The first table, 'Office Visit (New)', has a '+' icon and lists five options: Problem focused (99201), Expanded problem focused (99202), Detailed (99203), Comprehensive (99204), and Comprehensive (new patient) (99205). The second table, 'Office Visit (Est)', lists five options: Minimal (99211), Expanded problem focused (99212), Detailed (99213), Comprehensive (99214), and Comprehensive (new patient) (99215).

Figure 29. Enter Charges screen

If you have superbill templates saved with an appointment Reason, a template with the reason on the patient appointment will display instead of the one you have set as the default.

Tap the items that apply to the visit and tap Submit. If you have selected to see the Review Charges screen in Settings, you will see it at this point. Use the Review Charges screen to review the detail.

Review Charges

Provider: Hinckle, Wallace

Date of Service: 08/09/2019 8:45 AM

Facility: -

Case: 27 - TEST

Problem focused (99201)

Mod 1

Mod 2

Mod 3

Mod 4

Units: 1

Chicken Pox: 052.9

Comprehensive (99214)

Mod 1

Figure 30. Review Charges screen

Patient Quick Add

You can quickly add a new patient from your mobile device.

First, tap the Settings icon  and set the Quick Add switch in Settings to On.

Settings

App. Version: 3.2.55

Service Version: 3.0.223.0

Quick Add: ON

Auto Capitalize: OFF

Review Charges: ON

Auto-logout (minutes): 60

Template: Follow-up Visit

Figure 31. Settings screen

Note: When you set Quick Add to On, the Patient Intake button will be disabled on the Home screen.

Then, on the main screen, tap the search icon . The Search screen appears with the Add Patient button.

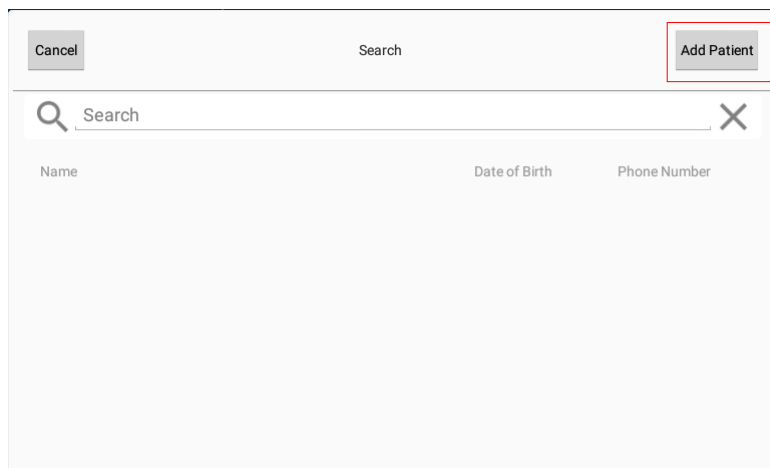


Figure 32. Search screen

Then, tap Add Patient.

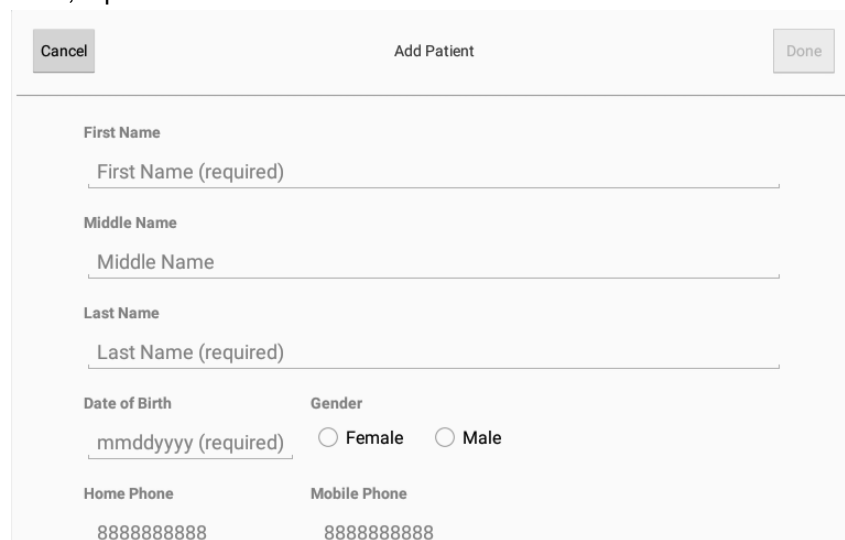


Figure 33. Add Patient screen

When you have completed all of the required fields, the Done button will be enabled. Tap Done and the patient is added.

Note that you must complete the new patient's record in Medisoft prior to sending claims.

Updating the Superbill Template

To maintain performance, eMDs recommends that you use the following limits for the size of your superbill:

- Less than or equal to 17 sections
- Less than or equal to 65 fields
- Less than or equal to 230 total fields

Performance will be affected by the amount of available RAM on the device.

You can update the superbill template by adding, changing, or deleting sections and items. In addition, you can specify which template will be the default template, and you can assign a Visit Reason to a template. When a Visit Reason is assigned to a template, that template will automatically open based on the Visit Reason specified for the appointment.

To open the superbill template:

1. On the mobile device, launch the application and log in.
2. Tap the **Settings**  icon at the top of the screen. The Superbill template appears.

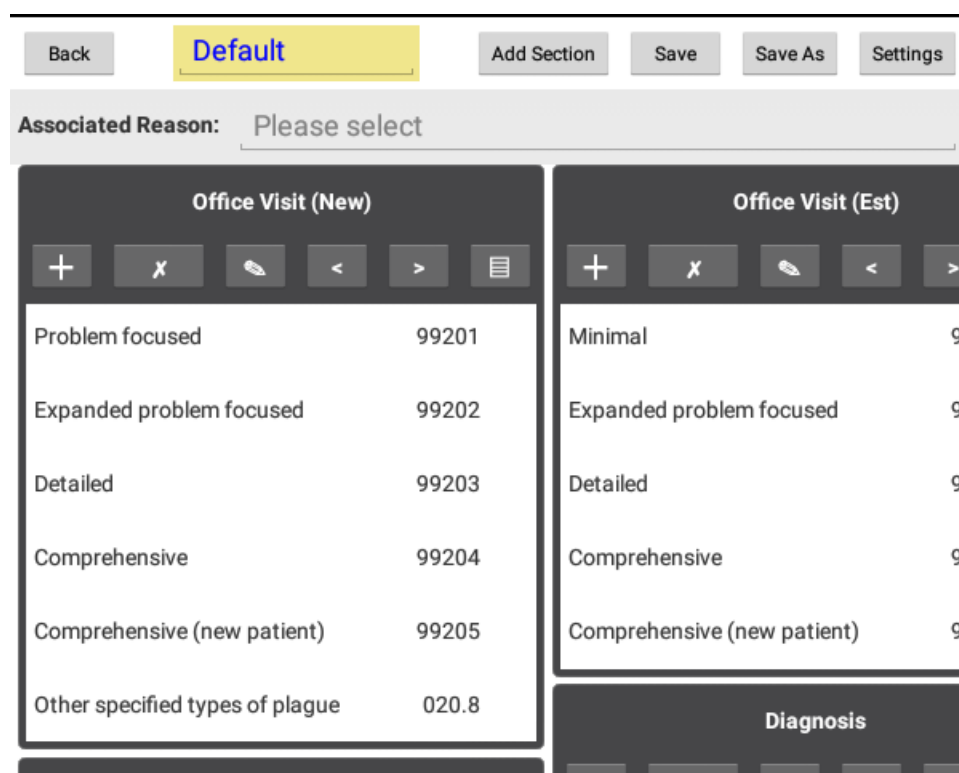


Figure 34. Superbill template

On this screen you can specify a template name and a visit reason in the Associated Reason field.

To add a section:

Note: Enabling Allow edit during charge entry will allow you to look up codes that are not already in this superbill section, so they can be used for that patient visit.

1. Tap **Add Section** at the top of the screen.

Figure 35. Add New Section screen

2. Enter a title for your new section and tap **Done**. The new section appears on the screen.

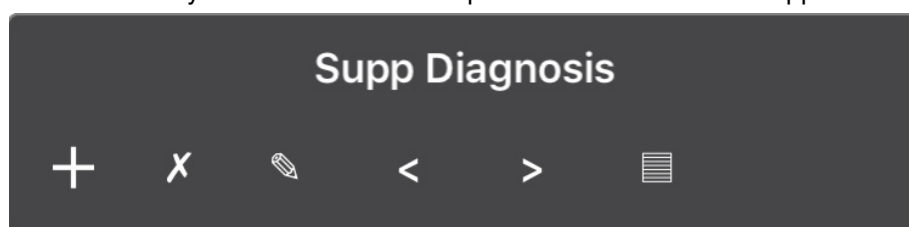


Figure 36. Superbill Template

Icon	Description
	Tap this icon to add fields to a section.
	Tap this icon to remove the section and the fields in the section.
	Tap this icon to edit the section and the fields in the section.
	Tap this icon to move the entire section one section toward the top of the template. If it is currently a right side section, it will move to the left side. If it is currently a left side section, it will move up a row and to the right side. Note: You must save a section prior to moving it to a different position on the template.
	Tap this icon to move the entire section one section toward the bottom of the template. If it is currently a left side section, it will move to the right side. If it is currently a right side section, it will move down a row and to the left side. Note: You must save a section prior to moving it to a different position on the template.

Icon	Description
	Tap this icon to reorder the fields in the section.

3. Next, add items to the section. To do so, tap the + icon. You can select one of five types of items:

Icon	Description
Procedure	Opens the Search Procedure screen so you can add a procedure.
Diagnosis	Opens the Search Diagnosis screen so you can add a diagnosis.
Free Text	Opens the Add Free Text screen so you can add free text to your new section.
Canned Text	Opens the Add Canned Text screen so you can add canned text to your new section.
URL	Opens the Add URL screen so you can add a URL for a web page.

4. When you click an icon, the appropriate screen appears.

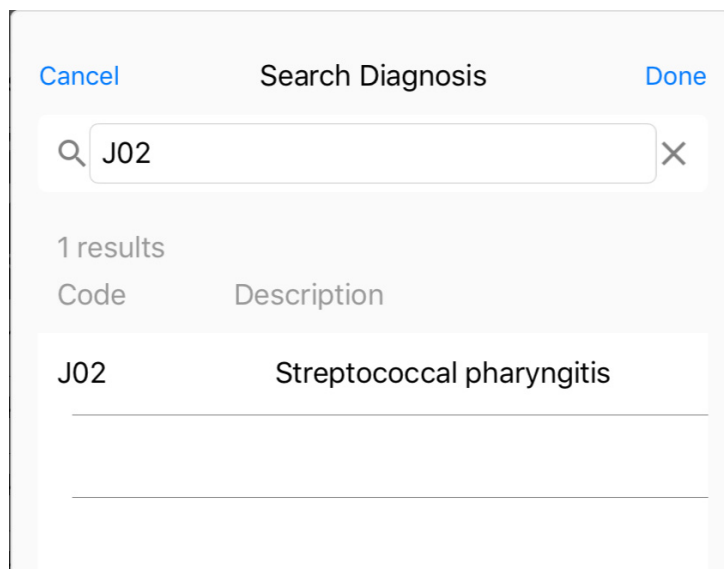


Figure 37. Search Diagnosis screen

5. Enter characters to search for the item and tap **Search**. The list of item appears.

6. Tap the item you want and tap **Add**. The item appears in your new section.

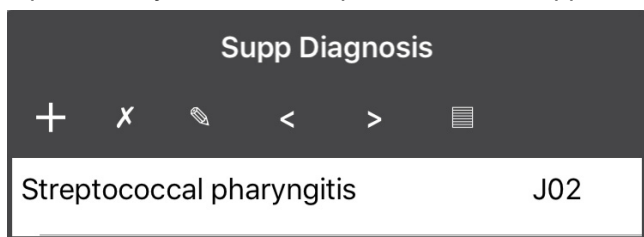


Figure 38. Section

7. Tap **Save** to save the template.

To edit a section:

1. Tap the Edit icon. The Edit screen appears.
2. Tap Section.
3. Make your changes.
4. Tap Done.
5. Tap **Save** to save the template.

To edit a field in a section:

1. Tap the field in the section to select it, designated by a check mark to the right.
2. Tap the Edit icon. The Edit screen appears.

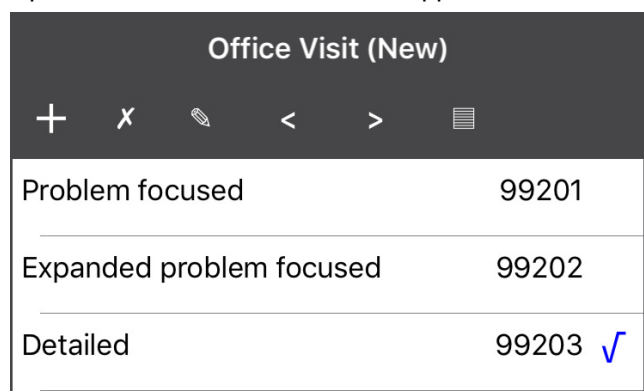


Figure 39. Office Visit section

3. Tap Selected Field.
4. Make your changes.
5. Tap Done.
6. Tap **Save** to save the template.

To remove a section:

1. Tap the X icon on the section.

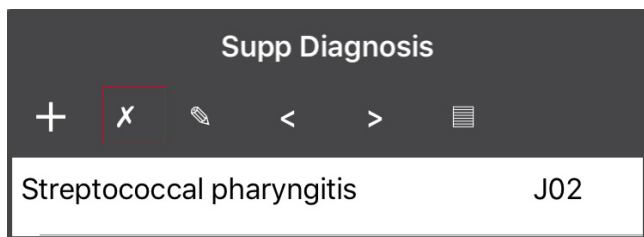


Figure 40. Section

The Remove screen appears.

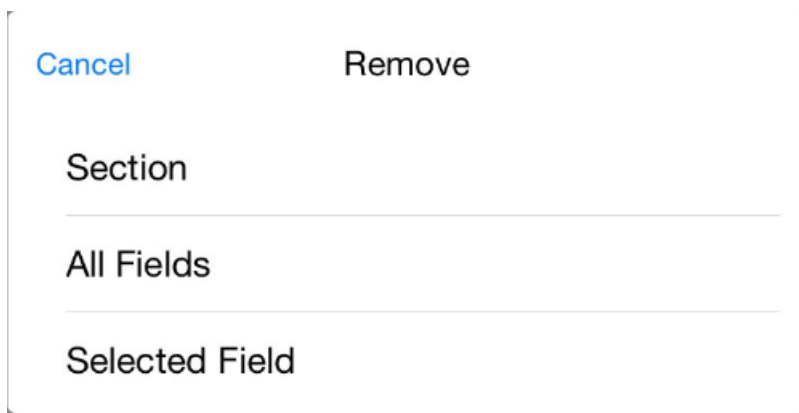


Figure 41. Remove section

2. Tap Section. The section is removed.
3. Tap **Save** to save the template.

To remove a field from a section:

1. Tap the field in the section to select it, designated by a check mark to the right.
2. Tap the X icon for the section. The Remove screen appears.
3. Tap Selected Field. The selected field is removed.
4. Tap **Save** to save the template.

Settings

There are several options that you can set in the Settings section. To open the Settings screen, tap the Settings icon. When the Superbill Template screen opens, tap Settings.

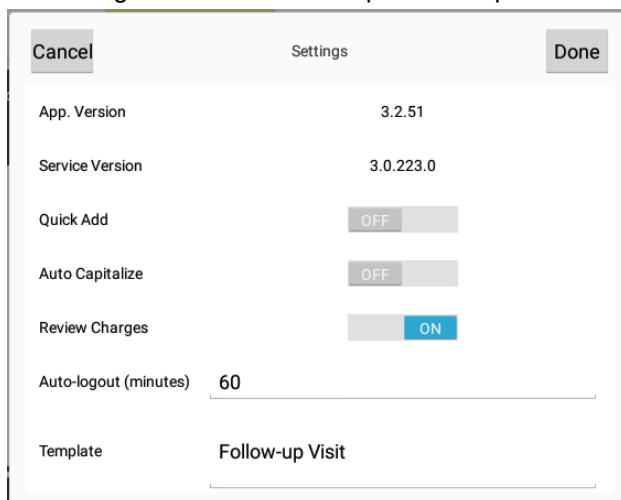


Figure 42. Settings screen

The table below describes the settings.

Setting	Description
App Version	This shows you the version number of the currently installed application.
Service Version	This shows you the version number of the behind the scenes mobile service.
Quick Add	Use this setting to enable or disable Patient Quick Add. For more information, see “Patient Quick Add” on page 22. <u>Note: When this option is set to On, Patient Intake is disabled on the app.</u>
Auto Capitalize	Use this setting to enable or disable auto capitalization.
Review Charges	Use this setting to enable or disable the Review Charges screen when you are sending charges.
Auto-logout (minutes)	Use this setting to determine how long the app will be idle before it automatically logs you out.
Template	Set the default template here.

Chapter 2 - General Guidelines for Customizable Forms for Patient Intake

Below are some general guidelines for the customizable forms that are part of the Patient Intake feature on the Mobile application.

NOTE: Prior to making any change to eMDs-supplied forms, be sure to make a copy of each, using a different name! You can use these as backups and as examples of correct coding. When you save the backup, eMDs recommends that you use the extension *.bak. If you use *.html, the backup form will also appear in Patient Intake.

There are two forms that you can customize:

- Medical History
- Practice Forms

Note: The mobile app will create the Practice Forms the first time. The default Medical History template form will be created in the default folder shown in the Template path when the Medical History is edited from the configuration screen, so that can be edited before an intake is done. If it is not accessed, then it will be created when the first Intake is done.

eMDs recommends using Notepad ++ to edit the Practice Forms. **Do NOT use Microsoft Word.**

Medical History

You can edit the Medical History Questionnaire form from within Medisoft.

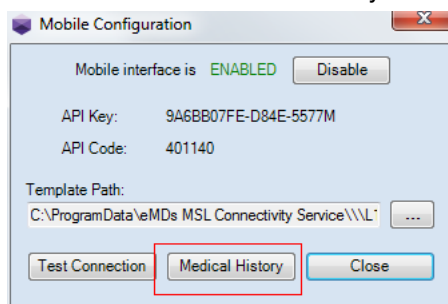


Figure 43.

Medical History Questionnaire

You can revise and modify the Medical History Questionnaire that patients will see when they come the forms during Patient Intake using a mobile device.

Patient Intake - Medical History Questionnaire

Introductory Text

This is an example of a Medical History Form and it is intended to provide you with a sample for customization. Please take the time to customize appropriately for your customer before using in a patient visit. I will now ask you some questions about your medical history.

Sections

Section Text	
Have you ever had any of the following medical conditions?	Add...
Have you had any of the following surgeries performed?	Edit
Does your family have a history of any of the following?	Delete
What medications are you currently taking?	
What medications are you allergic to?	
Do you currently smoke?	

Questions for Selected Section

Question Text	Answer Type	Choices	
Hypertension	YesNo		Add...
Diabetes	YesNo		Edit
Thyroid Disease	YesNo		Delete
Kidney Disease	YesNo		
Asthma	YesNo		
Cancer	YesNo		
High Cholesterol	YesNo		
Blood Clots	YesNo		
Migraines	YesNo		
Ulcers	YesNo		
GERD (reflux)	YesNo		
Stroke	YesNo		
Other	Text		

Reset to Defaults OK Cancel

Figure 44. Patient Intake - Medical History Questionnaire screen

The table below describes the fields and options on this screen.

Element	Description
Introductory Text	Use this section to enter text that you want patients to see when they complete the medical history section of patient intake.
Sections	
Section Text	This area shows you the sections of the medical history questionnaire that have been created.
Add button	Click this button to add a new section to your questionnaire. When you click this button, the Add New Section screen appears. Enter your text for the section and click OK to add the section.

Element	Description
Edit button	Click this button to make changes to an existing section. When you click this button, the Edit Section Text appears. Modify the existing text and click OK to save the change.
Delete button	Click this button to remove a section from the questionnaire. You will see a confirmation screen to remove the section.
Questions for Selected Section Select a section from the Section Text area and then use this grid to add, change, or remove questions from that section.	
Question Text	This shows you the text for the question.
Answer Type	This shows you the answer type. You have three choices: • Yes/No • Text • Picklist For more information, see “New Add New Question screen” on page 34 .
Choices	If the Answer Type is Picklist, you will see the potential choices that the patient can select.
Add button	Click this button to add a new question for the selected section. When you click this button, the Add New Question screen will open (for more information, see “New Add New Question screen” on page 34).
Edit button	Click this button to make changes to the question for the selected section. When you click this button, the Edit Question screen will open. The options on this screen are the same as those for the Add New Question screen.
Delete button	Click this button to remove a question from the selected section. You will see a confirmation screen.
Reset to Default button	Click this button to reset the questionnaire to its default form.
OK button	Click this button to save the changes you have made to the questionnaire.
Cancel button	Click this button to cancel the changes you have made and close the screen.

New Add New Question screen

Use this screen to add new questions to a selected section of your medical history questionnaire.

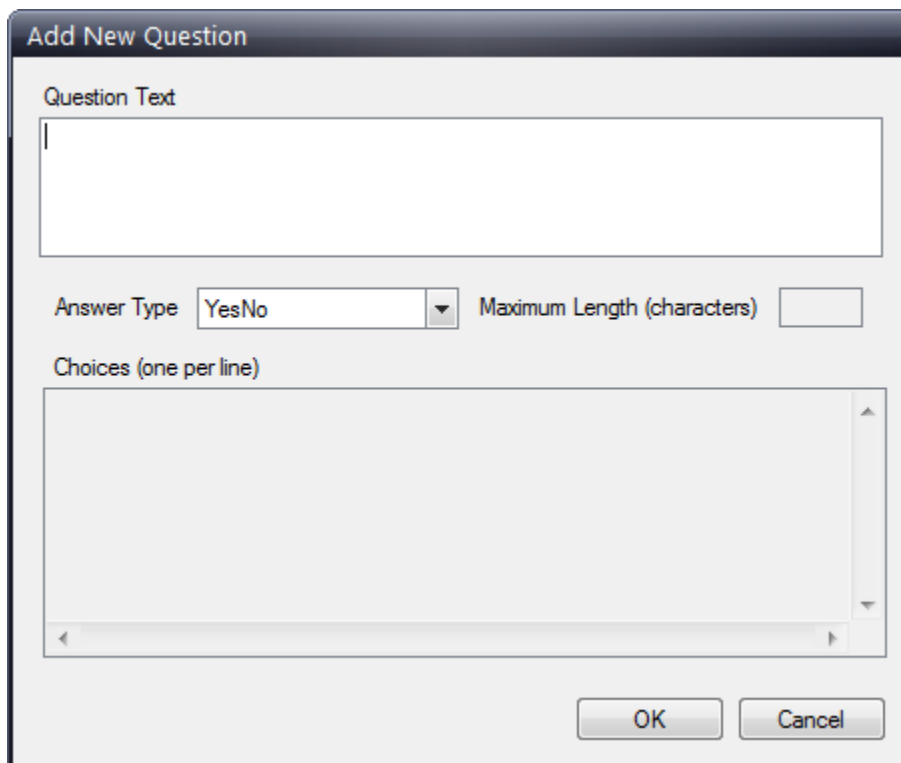


Figure 45. Add New Question screen

The table below describes the elements on this screen.

Element	Description
Question Text	Use this field to enter the text of the question that will appear on the questionnaire.
Answer Type	Use this field to select the type of answer that the questionnaire will require. The options are: • Yes/No--The patient will be required to select either Yes or No for the question. • Text--The patient will enter text into the field to answer the question. • Picklist--The patient will select an option from a list you create here. When you select this option the Choices section below will be enabled.
Maximum Length (characters)	Use this field to specify the maximum length of Text type questions.

Element	Description
Choices	This section will become active when you select Picklist as your Answer Type. Enter the choices that the patient can choose from, typing one per line. NOTE: Whatever you enter on the first line of the Question Box will appear as the default item in the Medical History form. eMDs recommends that you enter text such as "Please Select" or "Select" as the first line in the Question Text box. In this way, there will be no default item.
OK button	Click this button to save the new question and close the screen.
Cancel button	Click this button to cancel a new question and close the screen.

Practice Forms

The practice can have multiple forms to display within the patient intake process. The forms will be created using HTML.

Location on Server

Practice forms are stored in the following directory on the server that hosts the eMDs MSL Connectivity service:

- The default locations are as follows:
- C:\ProgramData\eMDs MSL Connectivity Service\practice name\IntakeForms\forms
- C:\ProgramData\eMDs MSL Connectivity Service\practice name\MedicalHistoryTemplates\forms
- C:\ProgramData\eMDs MSL Connectivity Service\practice name\SuperBills\forms

NOTE: "practice name" is a placeholder as presented here. The actual folder will be the database name. If you are hosting for a customer, then multiple different database names may appear here.

You can specify the default location for your Medisoft Mobile forms/templates. However, if you change the path on the Mobile Configuration screen, the existing templates will NOT be moved automatically. You must move them manually.

Reminder: Edits to your Medical History Template are saved when you click OK on the Medical History Questionnaire; so if you edit the Medical History before you change the path, you will need to move the folder.

You can change the default location on the Mobile Configuration screen in Medisoft (Tools > Services > Mobile Interface Configuration): The Template Path field is read-only and shows you the current path to the mobile templates/forms. The default is the location C:\ProgramData\eMDs MSL Connectivity Service\practice name.

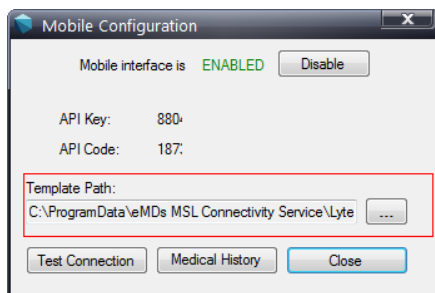


Figure 46. Mobile Configuration screen

To change the path, click the “Find (....)” button and browse to the location you want.

Note: You can only change the path from the server computer. If you attempt to change the path from a workstation, you will receive an error message:

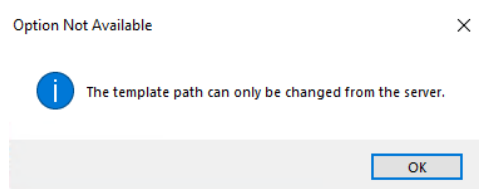


Figure 47. Option Not Available message

eMDs-provided Forms

There are three default forms provided by eMDs:

- Financial Policy
- New Patient Consent
- Office Policies

Format

The files must have an HTML (*.html) extension and contain valid HTML code.

The name of the file will be the name of the form displayed within the application. The files must contain the following tags:

- <html>
- <title>
- <body> (the contents of the form must be within the <body> tag.)

Basic HTML formatting tags are supported, such as <p>,
, <hr>, , <i>, , , and so on. However, more complex HTML tags are not supported, such as , <a href>, <form>, <frame>, <input>, <select>, <button>, <submit>, and so on.

The default forms contain a few tokens within the files that indicate special processing. Below is a list of the tokens:

Token	Description
\$(PracticeName)	This token will be replaced with the practice's name from Medisoft. You can place it anywhere in the form that you want to have the practice name displayed
Signature tokens: \$(SignatureBegin) \$(SignatureFirstName) \$(SignatureLastName) \$(SignatureDate) \$(SignatureEnd)	These tokens will be replaced with the signature information provided in the Forms section. Note: The information between the \$(SignatureBegin) and \$(SignatureEnd) tokens will not be displayed to patients when they are viewing the form. This data will be updated when the intake information is submitted and it will be viewable within the Medisoft desktop application.

There are also two placeholders in the default Office Policies form.

- ##practice name##
- ##practice / provider names##

Replace these placeholders with the appropriate text for the practice.

Example

You want to add the following questions to the Medical History Form:

The reason for your visit today is {Free Text}

Is this condition interfering with {Picklist with values of "work", "sleep", and "daily routine"}

Is the condition getting worse {"yes" and "no" answer}

1. Open the Medical History template (Default.xml) within Notepad++ or another editor.
2. Find the position in the form that you want to place these questions within the <QuestionBlocks> element.
3. Type in the XML code, using the guidelines above for QuestionBlock, Answers, and Answer. Below is an example of how the code will appear.

Notes:

- The entire section is bracketed by <QuestionBlock>.

- The initial question is part of a <DisplayText> section.
- All answers are in an <Answers> section
- Each individual question is bracketed with <Answer> and </Answer>

Below is how the form will appear on-screen:

Figure 48. Form appearance

Below the picklist is displayed:.

Figure 49. Picklist

Troubleshooting tips

In general, if the practice form does not appear as you expect, review the HTML in the form for missing or invalid HTML tags. The table below gives suggestions for other issues.

Problem	Possible solutions
---------	--------------------

I don't see the changes I made to a form.	Verify that you saved the form with the correct extension (*.xml for the Medical History template and *.html for the Practice Forms). Verify that you saved the form in the correct folder (see above for details).
I receive this error when opening patient intake: "An error occurred reading the medical history template."	Open the Medical History template and verify that there are no invalid XML tags.

Examples

XML files uses tags to designate where information displays in the medical history form:

Initial text display about medical history area:

```
<Introduction>This is an example.</Introduction>
```

Question block area:

```
<DisplayText>Have you ever?</DisplayText>
```

Answers for a question:

```
<Answer>
  <DisplayText>Hypertension</DisplayText>
  <FieldType>YesNo</FieldType>
  <FieldLength></FieldLength>
  <Values>
    <Value></Value>
  </Values>
```

</Answer>

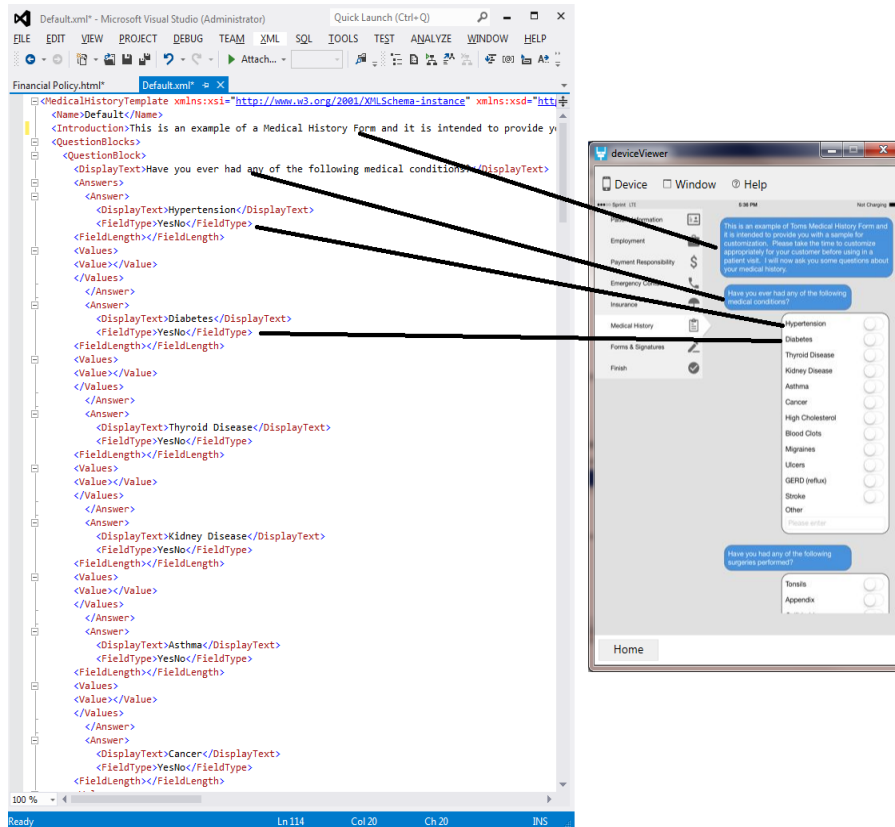


Figure 50. Code example

Question Block is used to group items together on the form for a question:

<QuestionBlock>

How old is the patient?

</QuestionBlock>

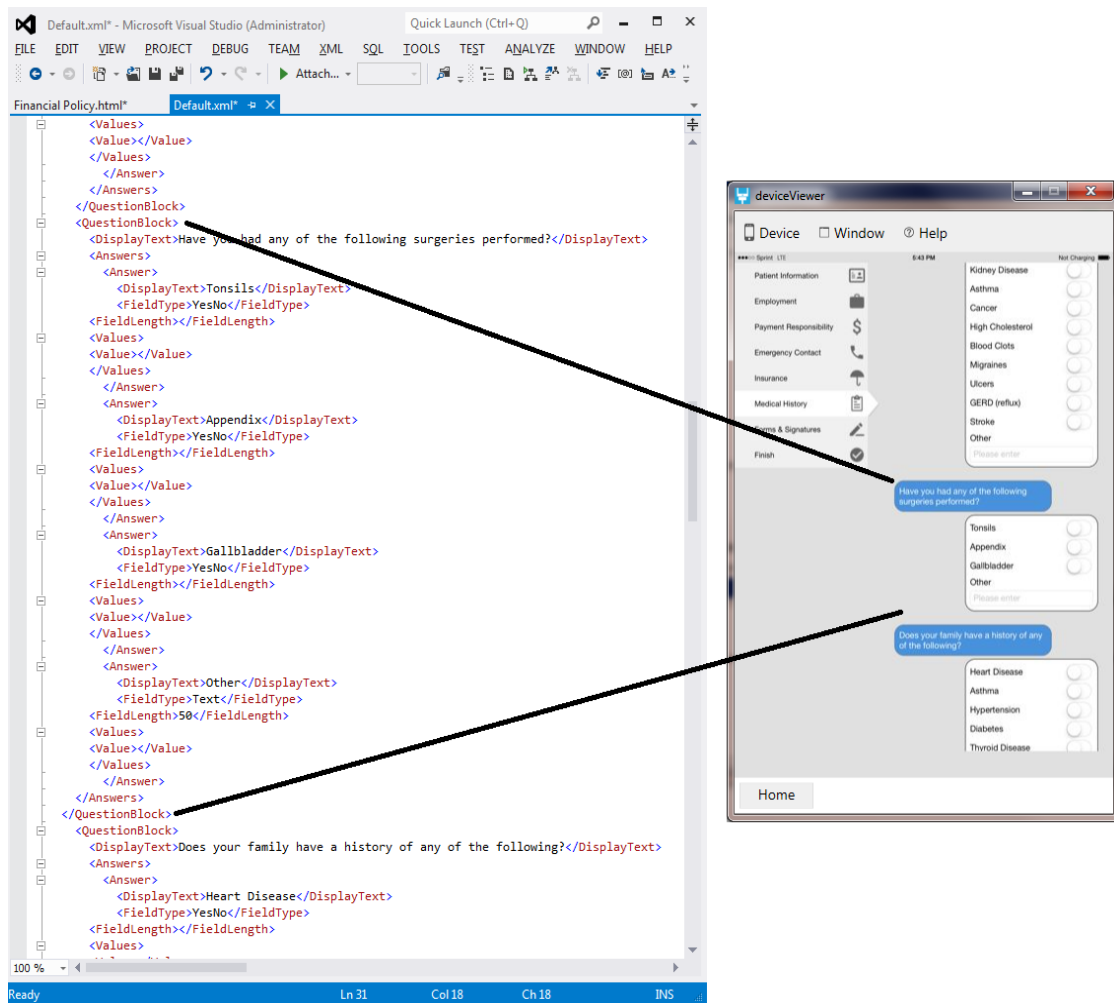


Figure 51. Code example

Free form text field:

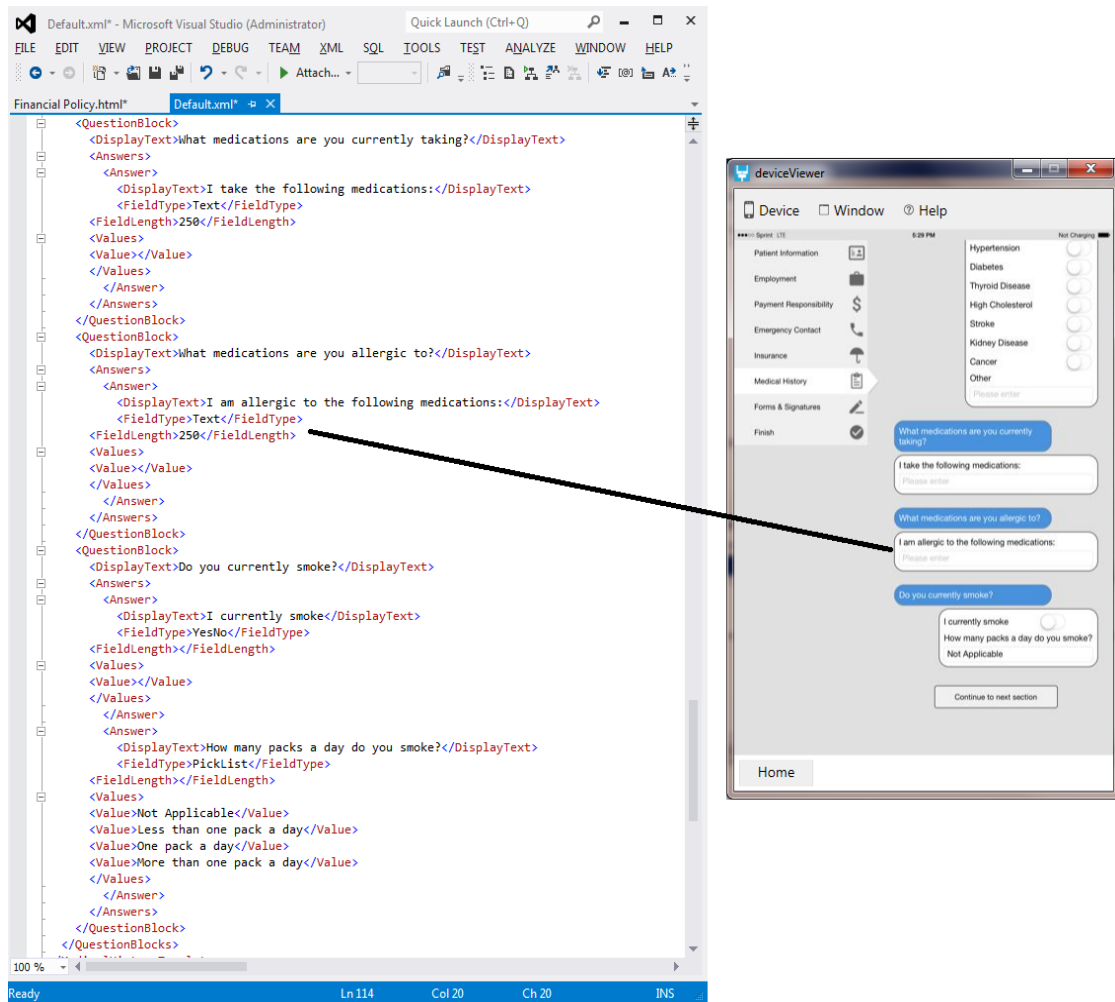


Figure 52. Code example - free form text

Yes/no answer field:

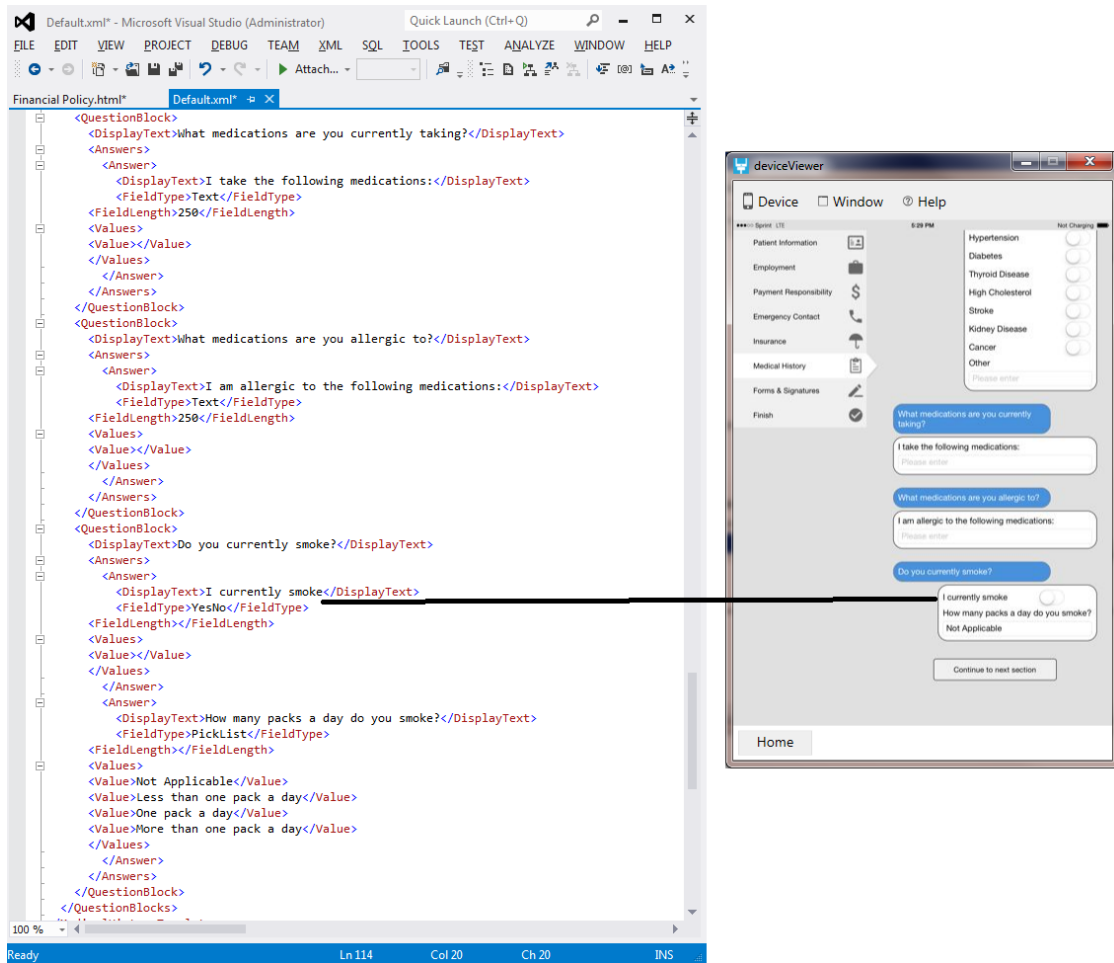
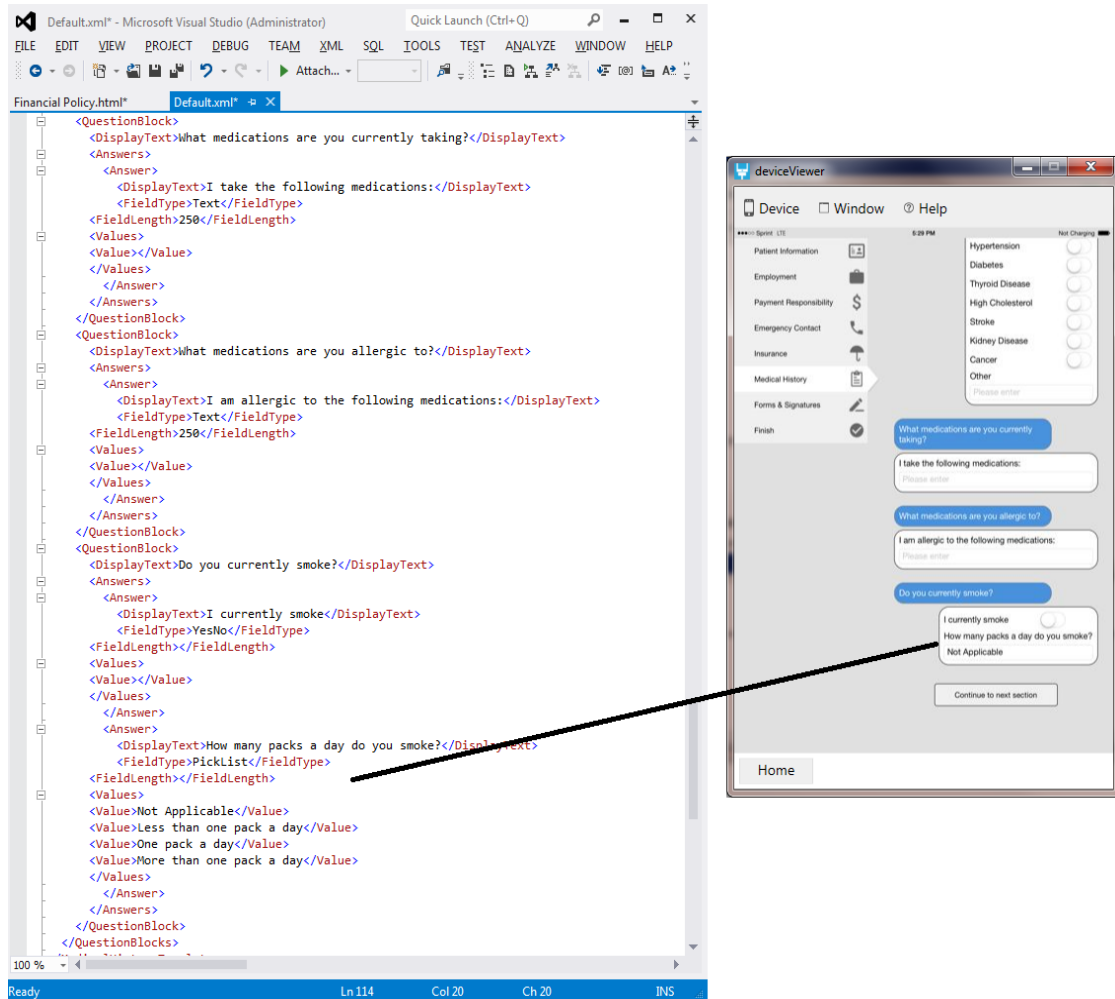


Figure 53. Code example - Yes/No Answer

Multi Select Field



Intake Form Example:

Paragraphs

<p>

This is an example of a Practice Form and it is intended to provide you with a sample for customization. Please take the time to customize appropriately for your customer before using in a patient visit.

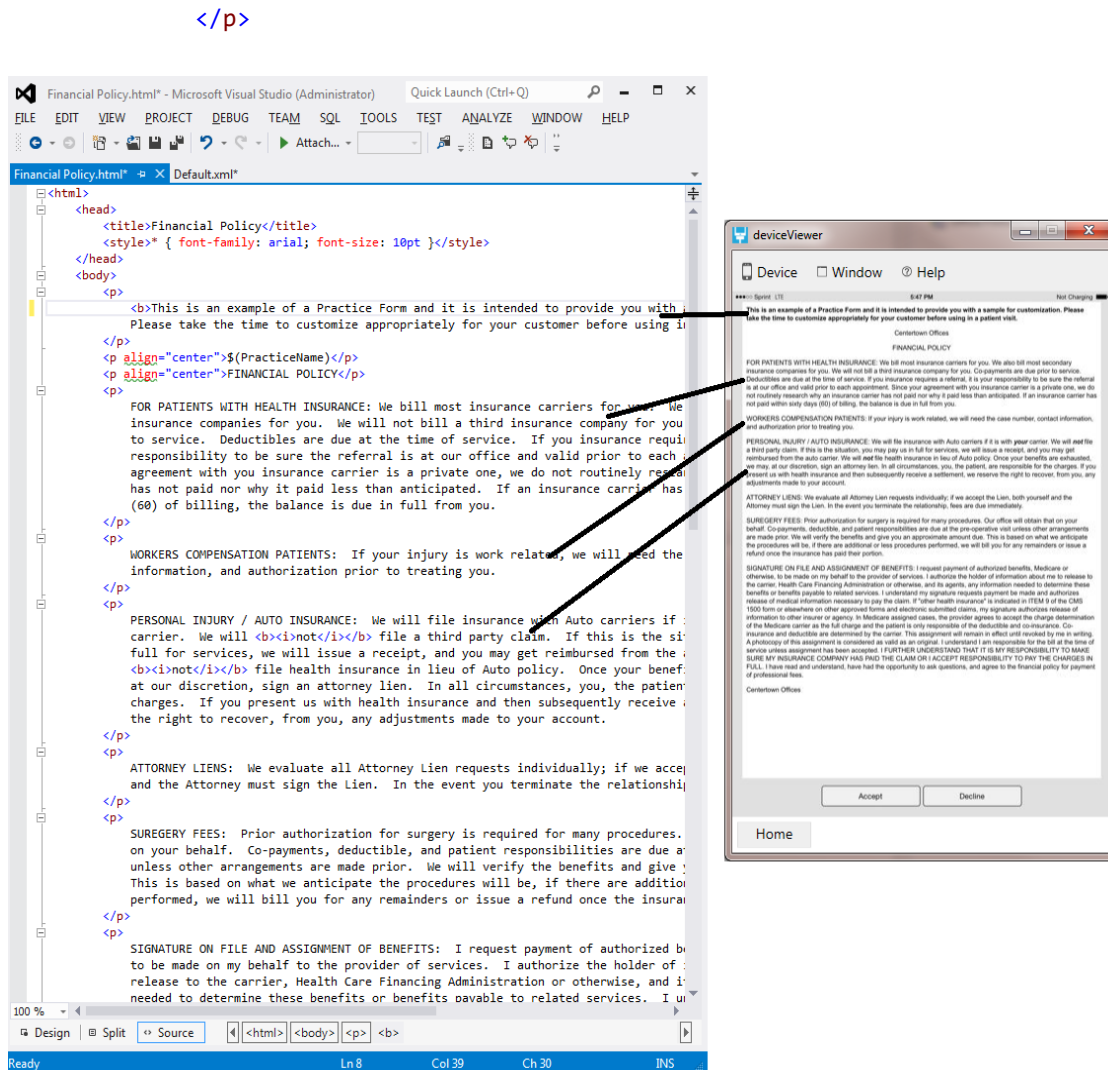


Figure 54. Paragraph example

Note: If the XML gets corrupted, the mobile application will display an error in the patient intake module: 'An error occurred reading the medical history template' and the medical history section will be blank.

Special attributes like bold and underline

```
<style>* { font-family: arial; font-size: 10pt }
        .auto-style1 {
            font-family: 'Times New Roman'; font-size: 10pt
            font-weight: bold;
            text-decoration: underline;
        }
    </style>
</head>
<body>
```

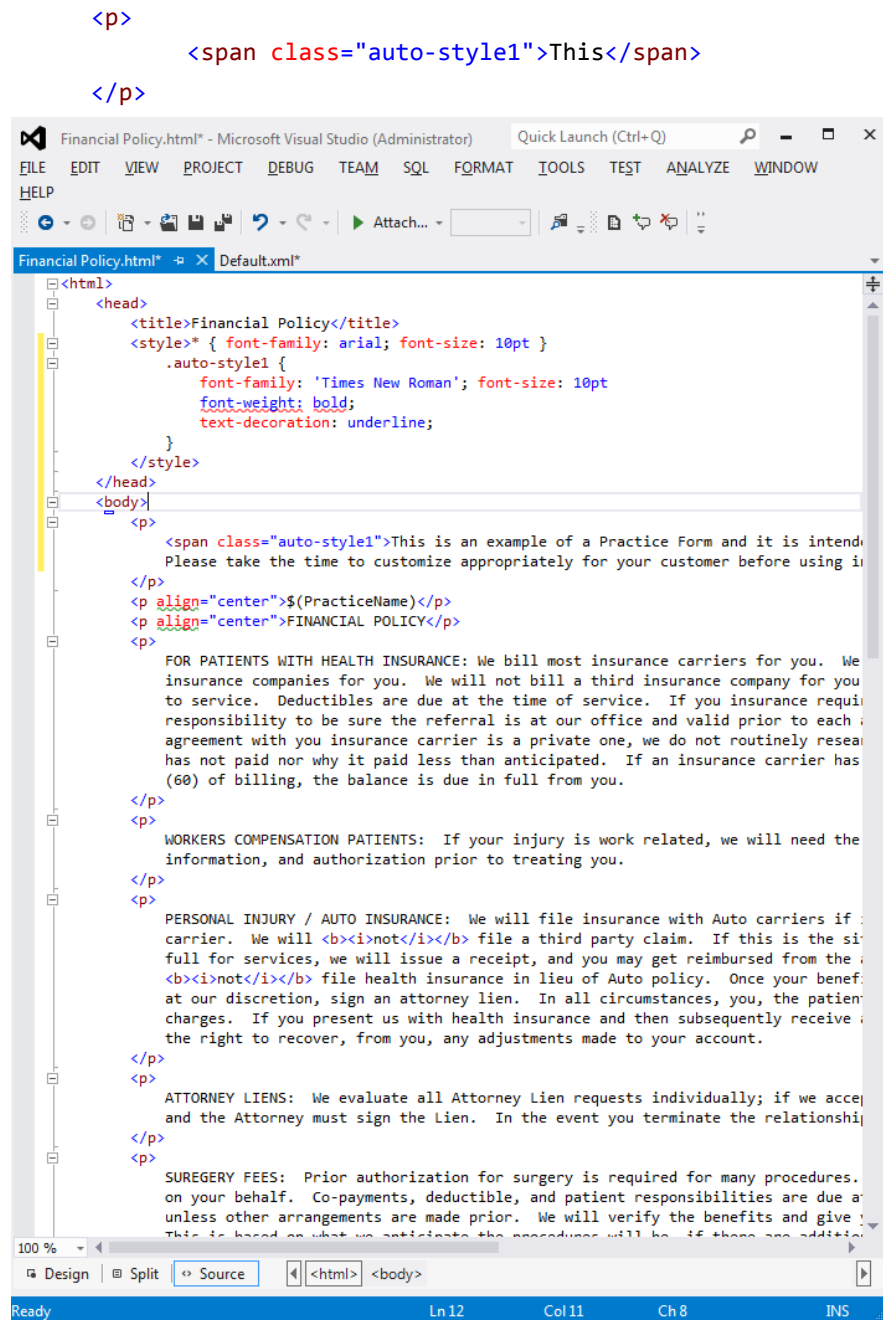


Figure 55. Special attributes example

Special tags get replaced within the application once the form is signed by the user and then displayed in the core product:

Token	Description
-------	-------------

\$(PracticeName)	This token will be replaced with the practice's name from Medisoft. You can place it anywhere in the form that you want to have the practice name displayed.
Signature tokens: \$(SignatureBegin) \$(SignatureFirstName) \$(SignatureLastName) \$(SignatureDate) \$(SignatureEnd)	These tokens will be replaced with the signature information provided in the Forms section. Note: The information between the \$(SignatureBegin) and \$(SignatureEnd) tokens will not be displayed to patients when they are viewing the form. This data will be updated when the intake information is submitted and it will be viewable within the Medisoft desktop application.

