

## How to build a Temporary Patient Chart

1. Get a folder utilizing the FIRST NAME color scheme. Use old folders with the initial of the last name on the tab. If none are available, grab a lettering sticker.
2. Go to CrystalPM > Patient
  - a. Print Patient Intake for the patient to update

**Mr. Test, Test**  
10156 Avenida Vista Cerros Nw  
Albuquerque, NM 87114-5905

Home # (555) 555-5555      Cell #  
Work # ( ) -      Other # ( ) -  
Preferred Contact Method

**Alert Comment**  
**Misc/ Guardians**

Account #	10000
SS#	- -
Birthdate	11/01/2016    Age: 13 months
Doctor	Dr. Reynolds, Dean

**Next Appointments**

Date	Time	Emp	Billin...	Type	Status
None					

**Insurance**

Type	Insurance	Copay
PRIMARY VISI...	Vision Service Plan	0.00

**Linked Accounts**

Name	Age	Last Exam	Next Ex...	Balance	Ins Balance

**APP CARD** Buy, Earn, Redeem. OFFICIAL MEMBER  
2061 9711 0404 8129

Buttons: Scan Image, Find Image, Card Shape, Rotate Image, Remove Image, Send Office, **Print Intake**

3. Go to CrystalPM > Patient > Files
  - a. First Ask:
    - i. Is the authorization missing? If yes, pull it
    - ii. Is the authorization expired? If yes, pull it
    - iii. Otherwise, print the valid authorization
  - b. Print 2-sided demographics gold sheet

Quick View | Patient Info | Additional Info | Insurance | Prescription | \*Notes | **Files** | Status

Date	Filename	Type	Description
12/04/2017	Document1.pdf	Clinical Files	Demographics
12/04/2017	Document1.pdf	Billing Dept	VSP Auth Expires 12/12/2017 (sample)

Red = stored location       Display TreeView

Buttons: Add File, Add Printed, Add Scanned File, Print Address Label, Create CCD or CCR, Send Office Document, Show Patient Log, Print Billing Label, Show Tasks, Email Office Document, Online Portal (Add/Remove Files), Print Folder Label, Edit File Type, Edit Description, Edit Filename, Edit Date, Remove File

4. Left side of chart
  - a. Old Gold Form
  - b. CPM Intake Update

- c. Blank Exam Form
- 5. Right Side of chart
  - a. Authorization
  - b. Fee Sheet
- 6. Labels
  - a. Folder Tab
  - b. Exam Form

### **Temporary Chart Scan**

When it is time for the temporary charts to get filed, they will be processed by the technician team who will discard repeated information (face sheet & demographics) and scan in new information (clinical 2017, admin 2017). The contents will be shredded and empty folder returned for re-use.