

ONE POINT LESSON

Installing Advanced Form Medtech Evolution

1.	The Advanced Form will be sent to the practice via email. Save the file to a folder or desktop. Open Medtech Evolution and in Options select: > Setup > Advanced Forms Manager	Setup « ACC » Accounting » Advanced Forms * Coding System Coding Term Advanced Forms Manager Advanced Forms Publisher Advanced Forms Folder Advanced Forms Group Concept Map
2.	The Advanced Form window will open. Click: > Action > Import Form	Setup Accounting New Action Image: Concent Man Accounting New Ctrl+N Form the Advance Advanced New Web Form Ctrl+W Aged Coding View Ctrl+O bestpi Coding Filter Ctrl+P Activa Advance Print Ctrl+P Advan Advance Export Form Ctrl+E Access Advance Import Form Ctrl+I ADHB Concent Man AKEREF Health Import Form (Ctrl+I) AKEREF Health BayauDio Referit
3.	Click 'Browse' to locate the Advanced Form you have saved on your computer: > Open the {filename}.xml > Click Validate > Click Import	Web ManagemyHeam Import Advanced Form Import Data Dictionary Data Dictionary file to Import: Browse Dictionary Details Validation Staus : Form code : Description : Web ManagemyHeam
4.	Change Publisher to Pinnacle (PINN) <i>If you cannot see the</i> <i>advanced form change Publisher</i> <i>to ALL</i> .	Options Setup Adv Accc Action * Publisher Action * Publisher Accounting Code Form Name HealthLink (HLK) Form Name Advanced Forms Action * Publisher Action * Publisher Coding System Accare Aged Care Registration Konnect NET (KNL) Form Name Coding Term Accare Aged Care Registration Konnect NET (KNL) Form Name Advanced Forms Manager Accare Acquare Care Plan Medtech (MT) Medtech (MT) Advanced Forms Publisher Actor P Advance Care Plan My Forms (L) Pinnacle (PINN) Advanced Forms Folder Activate ManageMyHealth ProCare (PC) All(*) ProCare (PC) Advanced Forms Group ACB ADHB ADHB referral HealthLink HealthLink

5.	Select and open on the advanced form required in the list. For example as highlighted - HPV Screening	Coding System Action • 	27
6.	Click the 'Actions' tab.	Web Publisher Folder Group X	
	Tick the box next to 'Send the Healthlink Folder.' If you already have Adv. Forms "published" under Pinnacle, you could copy the HLINK folder destination from another advanced form. But if you don't, you will need to locate the destination of your Healthink folder :\HLINK\FF_out\pinnacle). NOTE – the c:\ drive destination in the screenshot is just an example of where it 'could' be)	HPV Screening PINN Main Actions Fields Field Rules Form Rules User Settings Audit User Message: Summary Merge Text: Send To: None Arial Summary Merge Text: Send To: None Arial Send to Healthlink Folder: C:\HLINK\FF_out\PINNACLE Fxoott Format: Full Datails (Name+Address + Nbi)	
	Select: > 'Create invoice to Account' (You can select or create a new A/C holder for invoicing) Click OK.	Create Invoice to Account: Inactive: OK Cancel Help	