

**Demo of the Medical Charge Capture Form**

*Sample forms are downloaded with the Mi-Forms Designer and Client Software.*

*As always, please note that Mi-Forms does not come with any “out of the box” forms. All forms are designed to the specifications of the customer. This includes the look and flow of the form, any logic requirements, etc. Some things on a form might seem unusable to a customer, or might not make sense for their environment – that is fine as the client will create or have Mi-Co create a form that looks and works exactly as they need it to.*

*If demo is via webinar, point out that in a real use case there is no scrolling up and down – each page of the form would display as only one page.*

*Note that the form has clickable instructions which can help educate and guide the end user.*

*Although this is depicting a medical form, the functionality can be applied to any type of customer who requires pre-fill capabilities, calculations, forcing of data to be filled in a certain order, etc.*

**Point out** –

instructions re: use upper case letters, using capital letters is how this form was designed, it is not necessary as Mi-Forms can recognize lower case letters.

the **date is pre-filled and yellow highlighted areas indicate required fields**. Mi-Co recommends visual cues such as highlighting to help the end user fill out the form.

the little exclamation points – they give user instructions, in addition to listed instructions.

end user is unable to fill out form until either new or existing patient is selected.

**Select new patient** – patient # automatically assigned and the existing patient Drop down box is disabled

**Erase the New Patient and select Existing Patient**

**Click Existing Patient** **drop down box**–

Note -The picklist can be read from a backend database, or can be static information stored in form.

**Pick patient** – form is pre-filled with known information from the database.

**Change the phone number** and note how simple and that this new information will update the backend database.

**Scroll down to see form navigation, navigate to Office Visit page**

**Note choosing a doctor is required - Purposely leave the doctor selection** **blank** and explain you are doing this to demonstrate that the form cannot be submitted unless all required fields are completed and all fields are validated.

Note – as seen on the prior page another option is to not allow the end user to continue with the form until a doctor is chosen.

Another option not illustrated on this form would be to not allow the choice of new patient visit since on the prior page “established patient” was chosen, or use “skip logic” to skip to established visit.

**Choose Level 1 Patient Visit** and **navigate to Billing page**. Show that a billing amount is calculated.

Navigate back to Office Visit page, change Level and then navigate back to Billing page to show that the amount due has changed accordingly.

**Navigate to Procedures page – select some procedures.**

 **Add some hand written notes** – note that this writing stays as is, the forms also be designed to transform handwriting into text, also ability to allow keyboard entry.

**Navigate to billing page**.

Note the billing information has changed due to procedures selected.

Note if there was a previous balance it would be pulled from backend system.

Note – these are not editable by the user.

**Enter the amount paid and note new balance due.**

**Create a new appointment** – add a date prior to today - validation error appears in red, which people typically use to show as a critical error (best practice). This means it must be fixed. Enter a future date and red highlighting goes away. If error wasn’t fixed now the user would get error at form submission.

**Diagnosis Field -** Demonstrate the look up codes.

Click Green Arrow to submit the form – recall intentionally left the doctor blank – and show validation error

**Fix the error** by selecting a doctor and submit the form.

Based on the form design – an xml file is created, a csv is created and actual images of the form are created.

These will be found in your MCC folder in the Mi-Forms folder.