Medisoft Mobile 4.0

Startup Guide

January 2025

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Product

CGM MEDISOFT®

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Chapter 1 - Setup and Features

Overview

CGM 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 CGM 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

CGM' 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 app is for CGM MEDISOFT 29and newer. Note that certain features will work only with CGM MEDISOFT 29 and newer

Android

The following Android devices were tested and 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:

10.x and newer, including 10

Apple

iPad

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

- iOS 14 and newer was tested and is supported

iPhone

- iOS 14 and newer was tested and is supported

You cannot perform patient intake on an iPhone.

Windows version

The minimum version of Windows is Windows 10 version 1809 or higher, using Windows UI Library (WinUI) 3.

MSIX files can be installed on later versions of Windows, including Windows 11. However, the minimum supported version for installing .msix files is Windows 10 version 1809.

You can use the mouse, keyboard, or touchscreen (if available) to navigate and enter data. When using keyboard to enter data, you need to use the mouse to navigate to fields; standard keyboard tab/Entr key are not supported in most places. Keyboard entry is for typing only.

Firewall Considerations

For mobile 4.x apps, the CGM 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 CGM 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 CGM 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 CGM MEDISOFT Mobile.
Android Tablet	From the Google Play Store, search for and install CGM MEDISOFT mobile.
Windows	Open the Microsoft Store on your computer and search for the Mobile app. Follow the instructions to install.

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

Figure 1. CGM MEDISOFT icon

Figure 2.

Installation and configuration--new users

The mobile service for 4.0 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 CGM 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, App Store, or Microsoft Store.
7. Search for CGM 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 CGM 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 CGM 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. Take note of the API Key and API Code. These will be different for each practice.
4. Launch the mobile application.
5. Tap Add.
6. Enter the API Key and Code that you noted.
7. Tap Save.

Logging in on the Mobile device

To log in:

1. Enter your CGM 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.

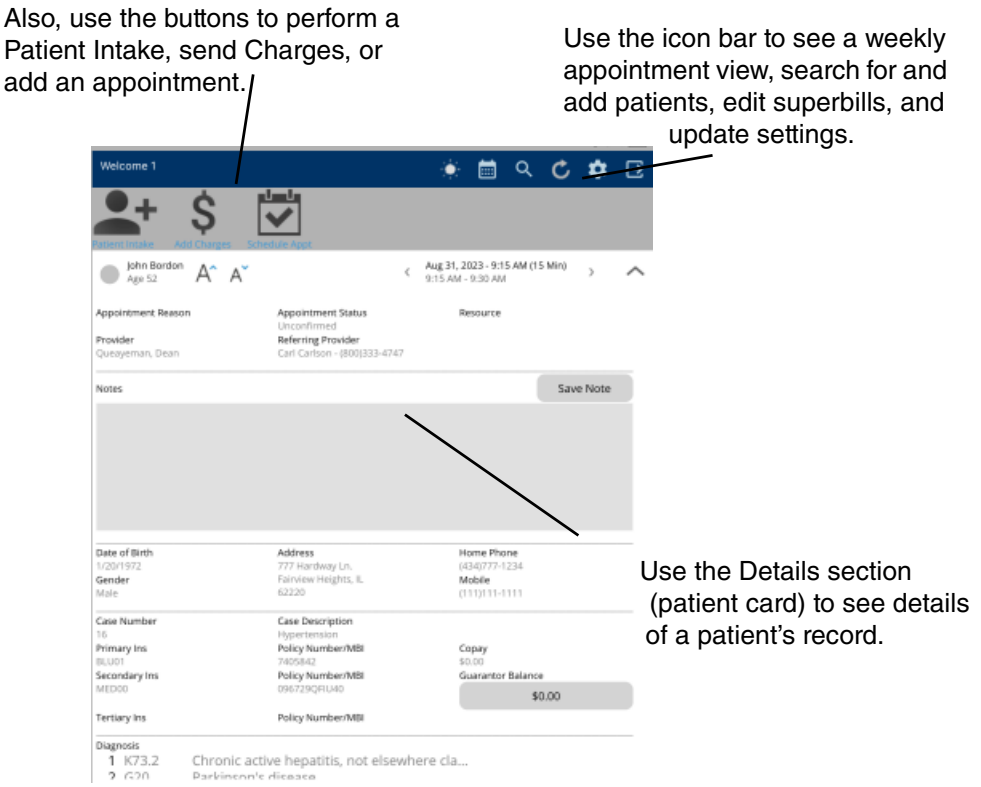


Figure 3. Home screen

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 23, for more information) or charges have been sent to the core application (for more information, see "Add/Send charges" on page 26).

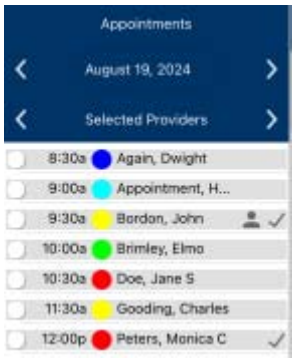


Figure 5. Appointments with check marks for Patient Intake and Sent Charges

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.

Eligibility Status

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

Icon	Description
	None/Verification not attempted
	Unknown
	Inactive
	Active

Figure 6. Appointment section of Home page

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 at the bottom of the screen

Figure 7. Date picker

Use your finger to slide the elements of the date up and down.

Viewing details on the Patient Card

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

Figure 8. Patient card (collapsed)

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

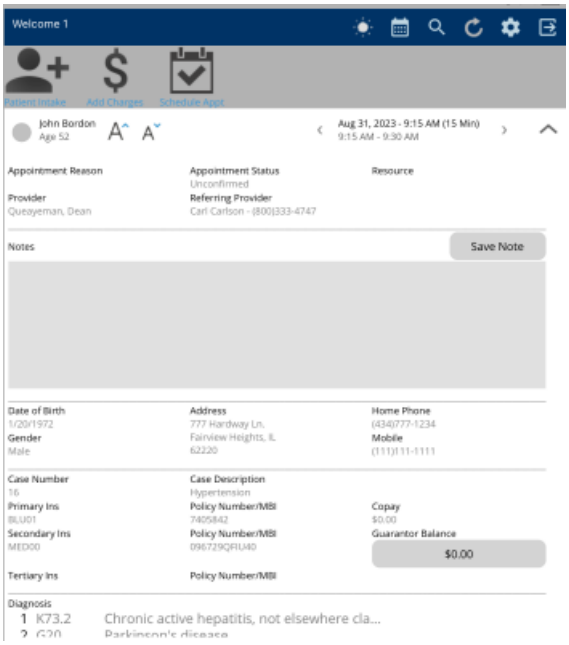


Figure 9. Patient card (expanded)

Adding/Editing notes (CGM MEDISOFT 25 and newer)

You can add or edit notes by tapping in the Note area. Then, you can use the keypad to enter a note. When it is complete, tap Save Note.

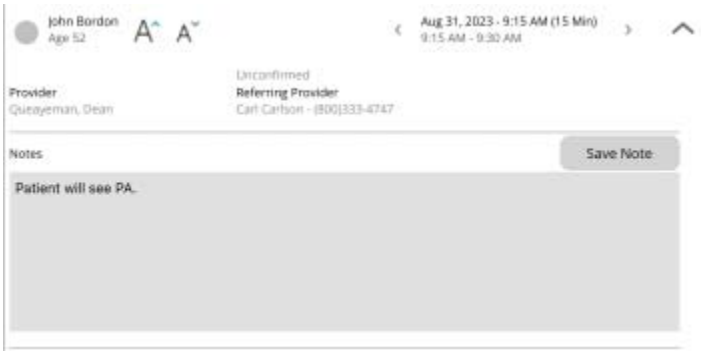


Figure 10. Patient Card (expanded to show Notes area)

If the appointment is a repeating appointment, you will not be able to edit the note here; and the Save Note button will be disabled.

Additional information on notes

- You must save the note prior to moving to another patient. Otherwise, you will lose the note.
- Due to the multiple variations in Android and Ipad tablets, as well as different fonts and resolutions, you may notice some differences in the display of the Notes text.

  Android tablets

  A very long note may not display the start of the note, so CGM recommends that you use the scroll ability to make sure you are seeing all the text and not missing anything at the top. Depending on your tablet you may also notice that when scrolling it may be easy to unintentionally enter 'edit mode'.

  iPad

  Long notes on a patient record may maintain the previous scrolled position when you leave a patient record, view another patient record, and then return to the first patient record.

  Navigating to second patient record while in Edit mode in the first patient record (with the keyboard displayed) may put the second patient record in Edit mode automatically.

  If you use landscape mode on an iPad you may notice the Appointment Note section may be partially obscured by the iPad keyboard as it appears on the screen. To minimize this, disable Auto-Correction, Shortcuts, and/or Predictive as keyboard options. In addition, you may need to change these settings separately to see which provides optimal viewing of the screen.

Note editing with iPhone

To add or edit a note using iPhone, follow these steps:

1. Open the patient's record on the Home screen.

2. Expand the patient's details.

Figure 11. Patient Details

3. Scroll to the Notes section.

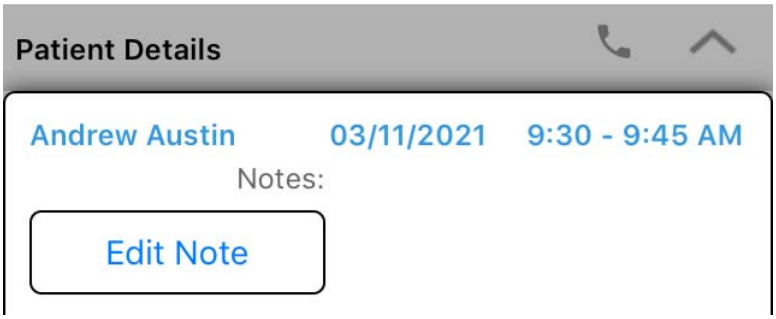


Figure 12. Patient Details - Notes section

4. Tap the Edit Note button on the patient's details. The Edit Note screen opens.

5. Type in the note on the Edit Note screen.

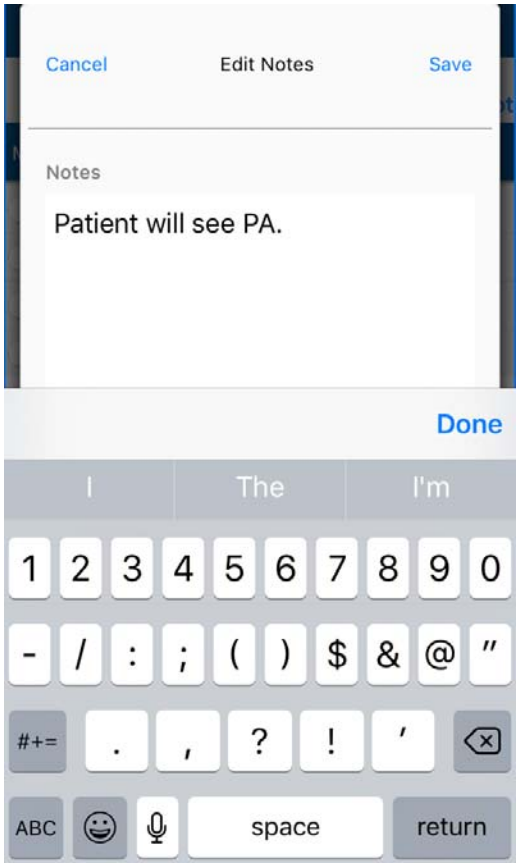


Figure 13. Edit Note screen

6. Tap Save. The note appears on the Home screen.

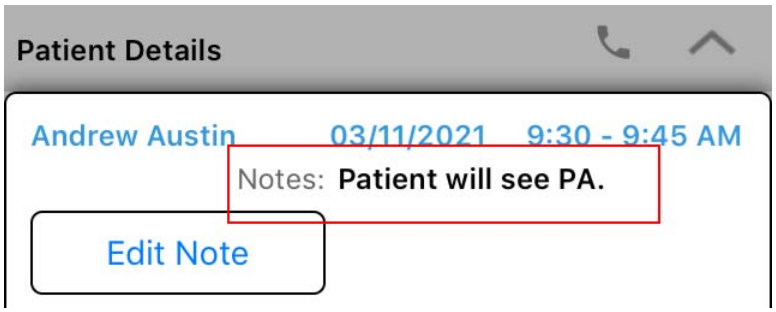


Figure 14. Home screen - Patient Details

Scrolling Appointments

You can now scroll through the patient's appointments using new buttons. These buttons will be disabled if the patient has no previous or next appointment. Appointments will scroll backwards up to the previous two years from the current date and forward two years from the current date.

This feature is available only for those with CGM MEDISOFT v29 or CGM LYTEC 2025 and newer.

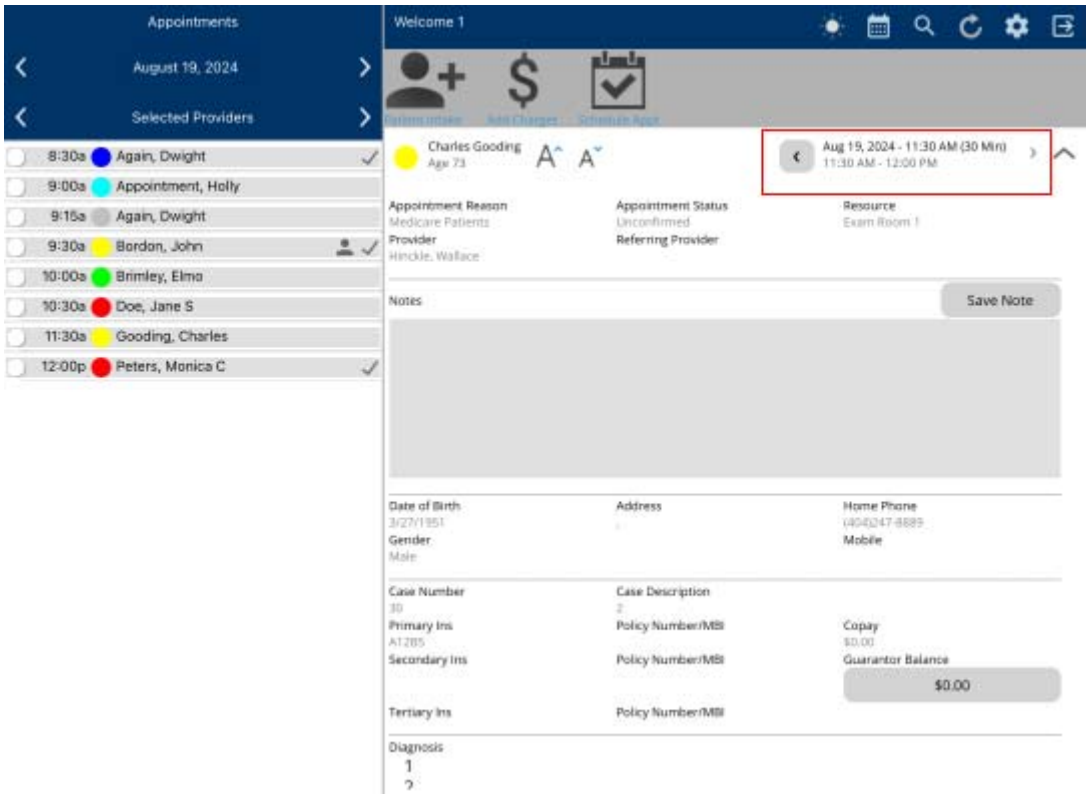


Figure 15. Patient Record - detailed view

In addition, you can change the size of the font.

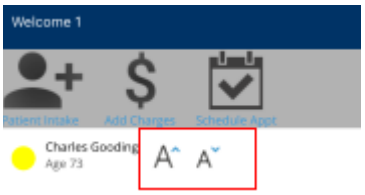


Figure 16. Font Sizing icons

Regarding the Date of Service for a charge

Make sure the date of Service for Charges is what you want it to be.

If you use the scroll buttons to view future or past appointments at the top of the patient card, and then tap immediately on Charges it will go to the superbill screen with the Date of Service for that appointment in view. If that is not the date you want, the Date of Service can be changed on the Review screen.

Here is a Best Practice so you do not mistakenly add charges for an unwanted date: If you scroll to look at future or past appointments and want to enter charges for today, make sure to tap on the patient's name in the appointment list before adding charges so the Date of Service will be today's date.

Theming

You can select either a light them or a dark theme. .

Figure 17. Home screen

Android and iOS

The app is aware of System Themes on Android (10+) and iOS (13+)

- When the System Theme is in Light, the app Theme can be switched between Light or Dark
- When the System Theme is in Dark, the app Theme will be in Dark (and cannot be changed to Light)
- When the System Theme is changed while a mobile app is running, the app will adjust to that theme change when activated

Windows

The app is aware of the Windows Light and Windows Dark System Theme options of Windows 10+

- When the System Theme is in Windows Light, the app Theme can be switched between Light or Dark
- When the System Theme is in Windows Dark, the app Theme cannot be changed to Light
- When the System Theme is changed while a mobile app is running, the app will NOT adjust to that theme change when activated; however, the app will be aware of the currently selected System Theme when the app is started and will adjust accordingly

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.

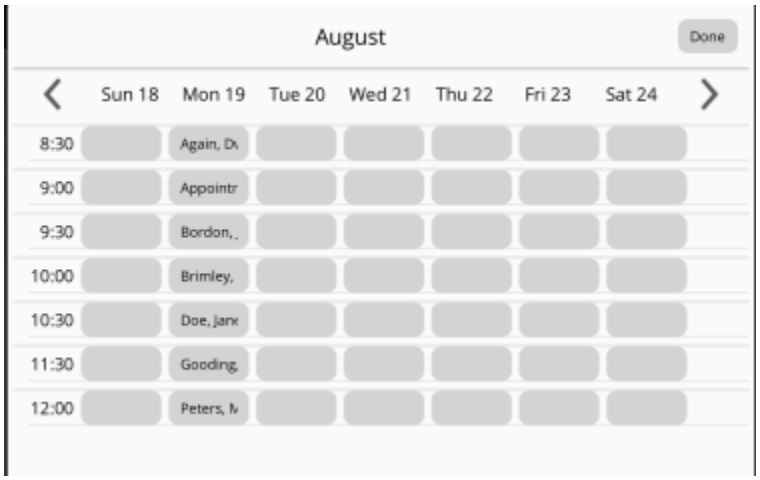


Figure 18. Weekly view

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.

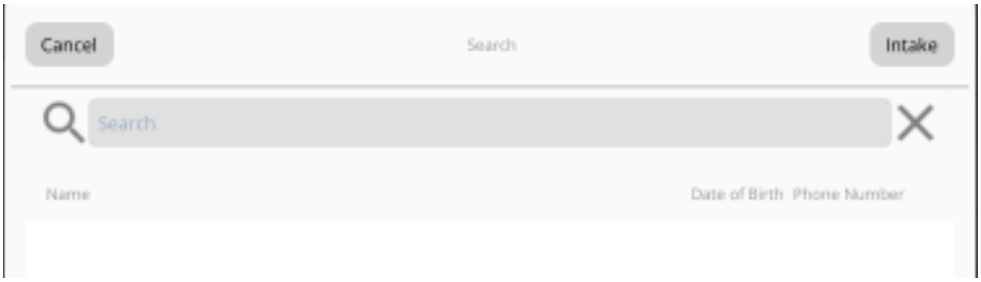


Figure 19. Patient Search screen

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 30 for more information.

Phone Dialer

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

- Appointments
- Charges
- Review Charges

Note: this feature is available only on iPhone.

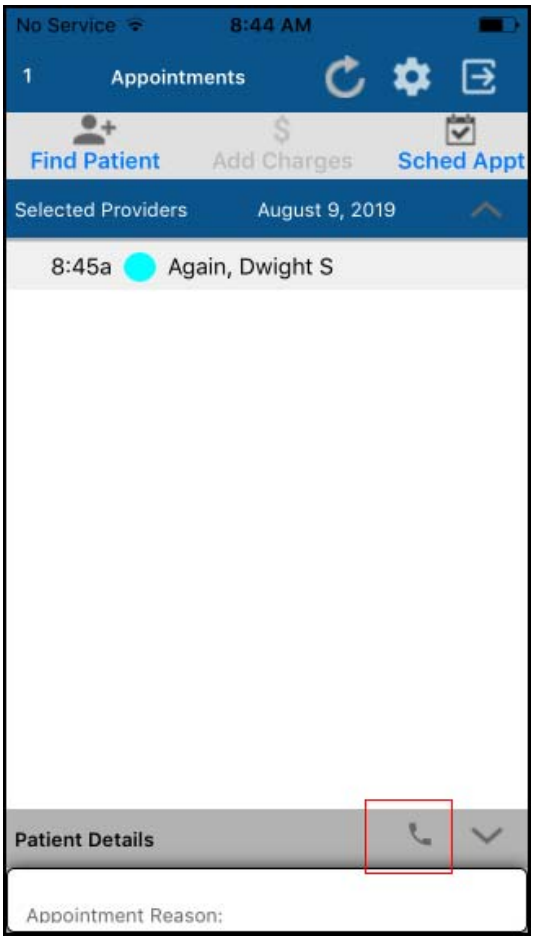


Figure 20. Appointments screen

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.

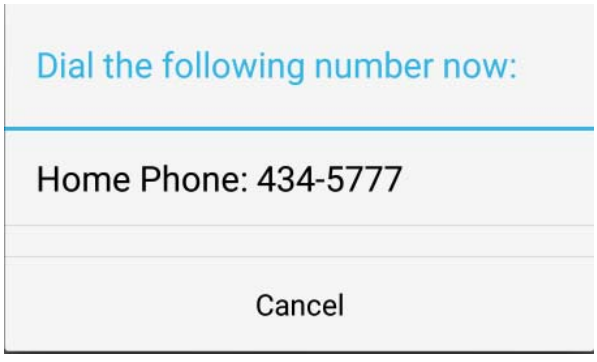


Figure 21. Phone Dialer screen

Scheduling an Appointment

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

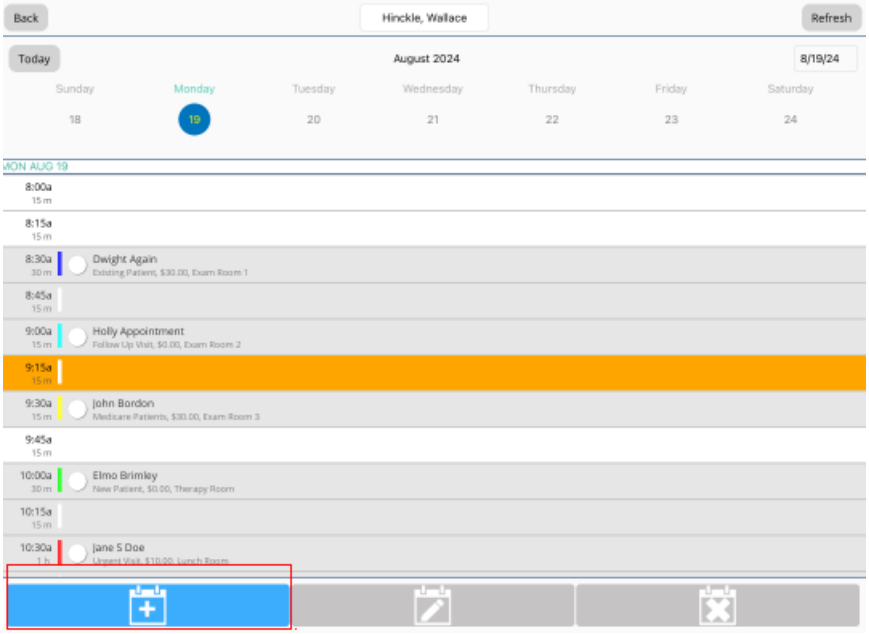


Figure 22. Schedule screen

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.

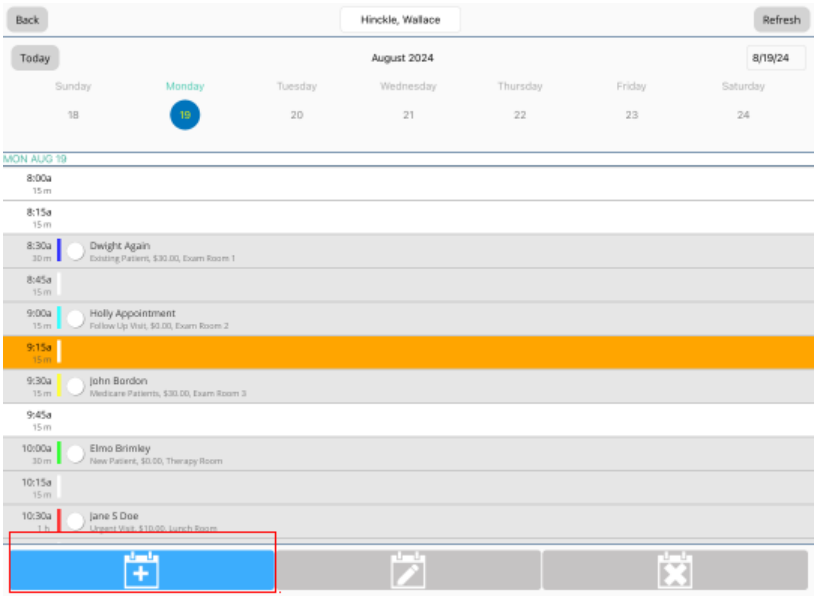


Figure 23. Schedule view

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.

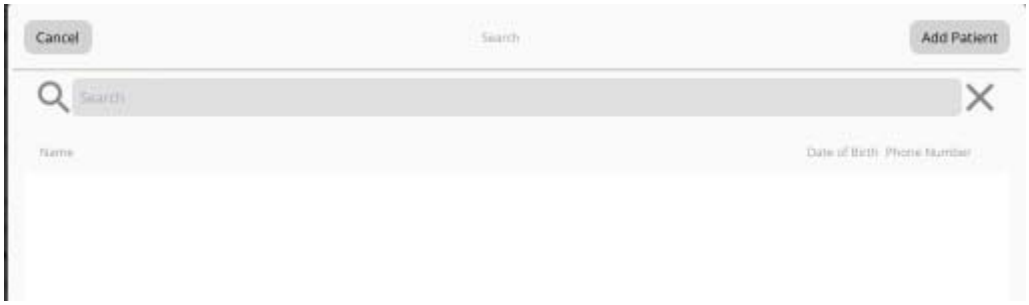


Figure 24. Find Patient screen

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.

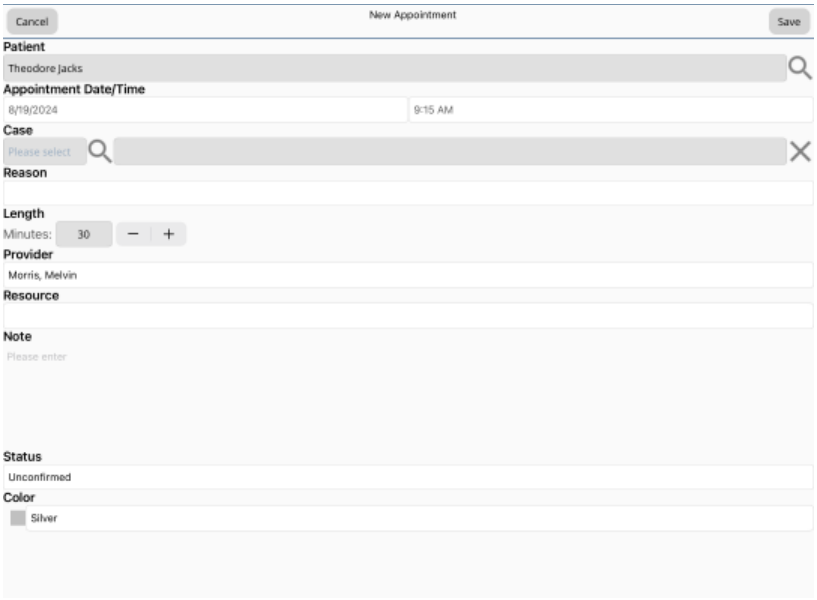


Figure 25. New Appointment screen

Selecting a Case s available only in CGM MEDISOFT Mobile 3.2 and newer with CGM 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 CGM MEDISOFT core.

Figure 26. Case Select screen

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

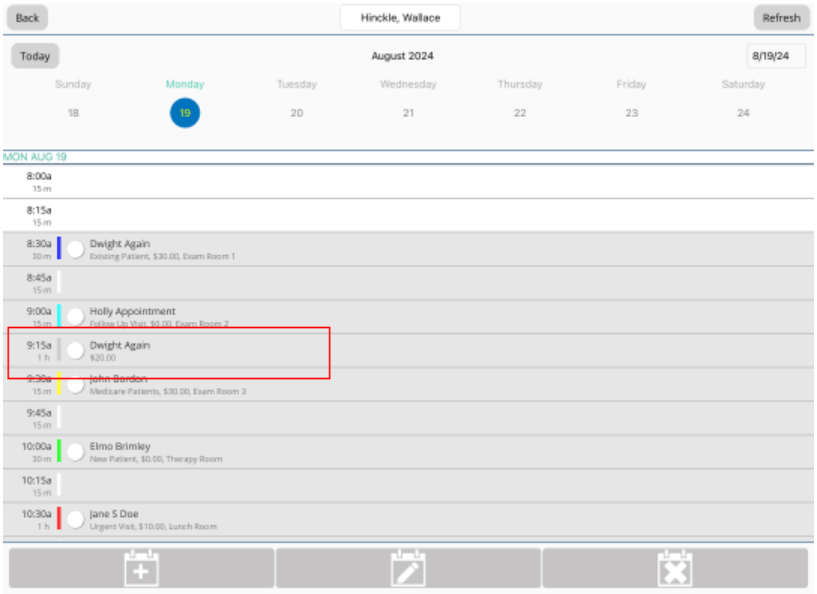
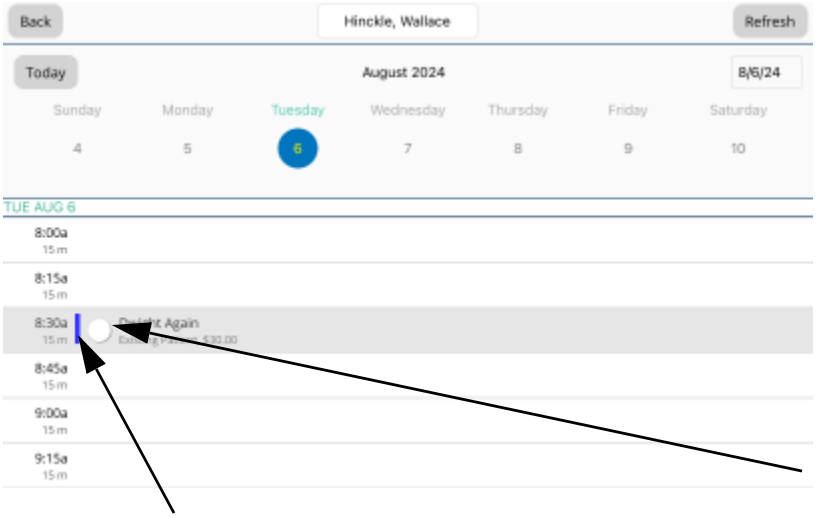


Figure 27. Appointment screen

Longer appointments

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



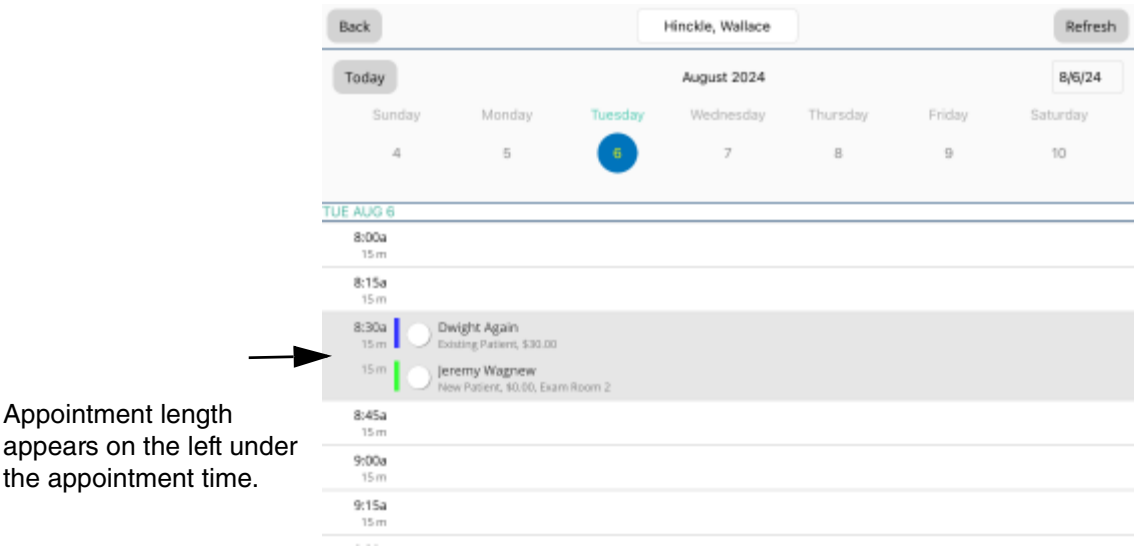
Visit reason is indicated by the color in the bar to the right of the appointment time.

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

Figure 28. Appointments screen

Double-bookings

Double-bookings appear in the same slot.



Appointment length appears on the left under the appointment time.

Figure 29. Appointment screen

Editing appointments

You can edit an existing single appointment using CGM 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.

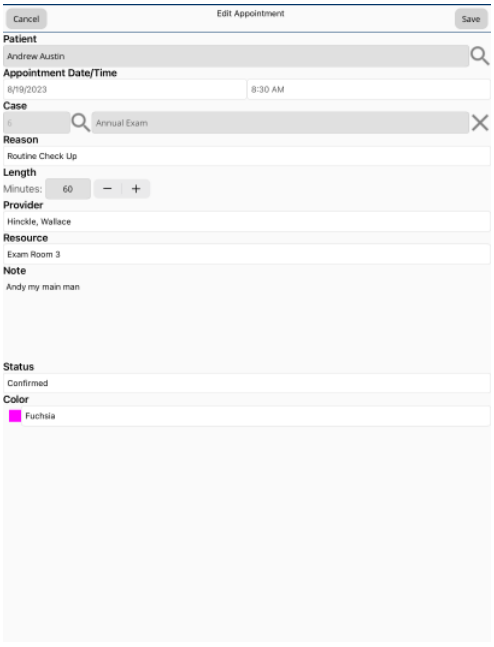


Figure 30. Appointments screen

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 CGM 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.

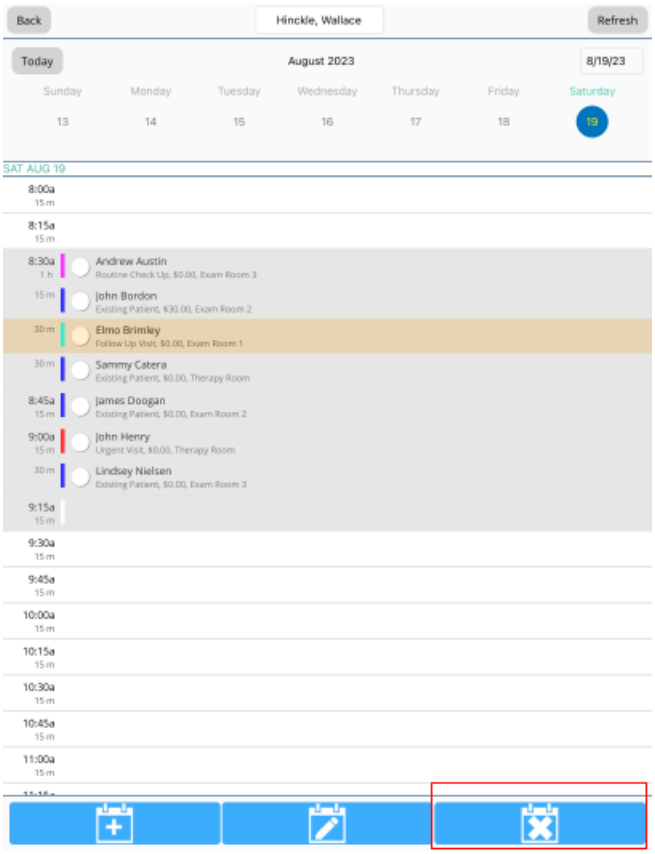


Figure 31. Appointment screen

Patient Intake

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

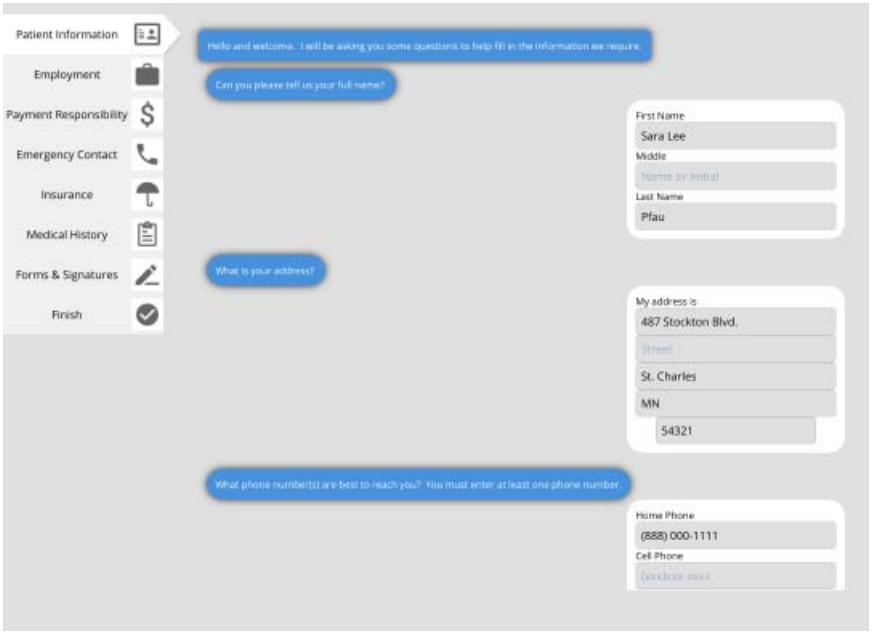


Figure 32. Patient Intake screen

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.

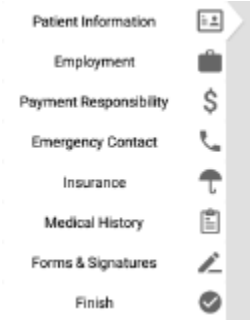


Figure 33. Patient Intake menu

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 39.

Performing a patient intake

New Patient

Follow these steps to perform a patient intake:

1. Start the CGM 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.

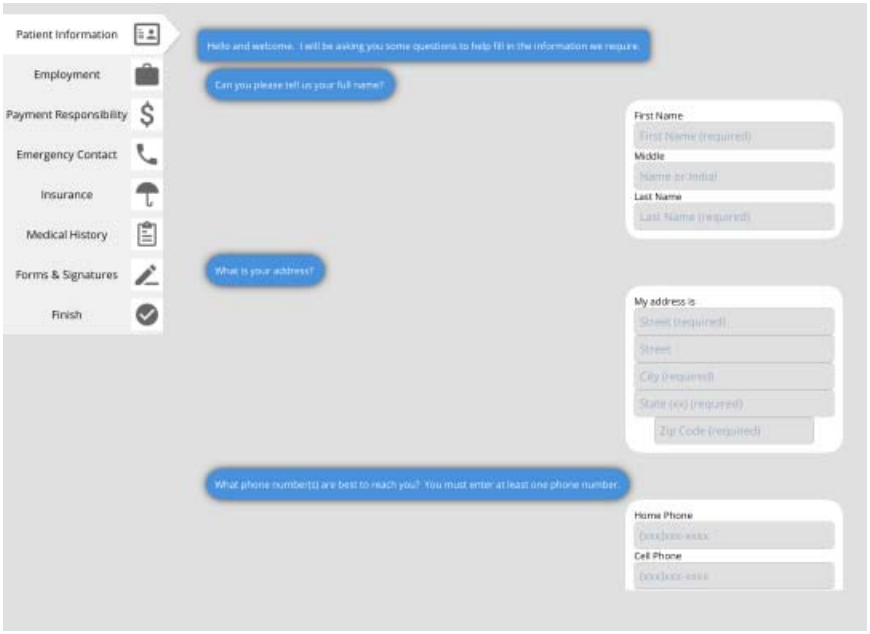


Figure 34. Patient Intake

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 35. Patient Intake

6. Enter your Username and Password.
7. If you want to save the patient's information and send it to CGM MEDISOFT, make sure that Save Patient Intake is On (green).
8. Tap Login.

9. Use Pending Patients in CGM MEDISOFT for reviewing and updating the patient record in CGM MEDISOFT.

Updating a patient record

Follow these steps to perform a patient intake:

1. Start the CGM 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.

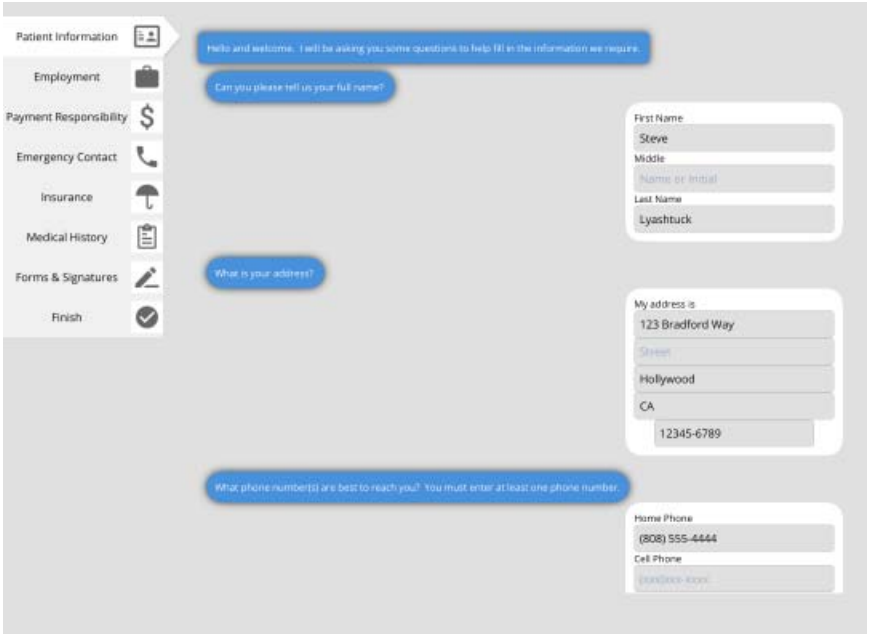


Figure 36. Patient Intake

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:

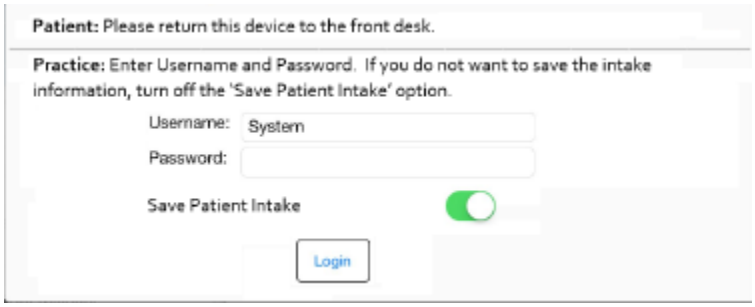


Figure 37. Patient Intake

6. Enter your Username and Password.

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

Add/Send charges

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

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

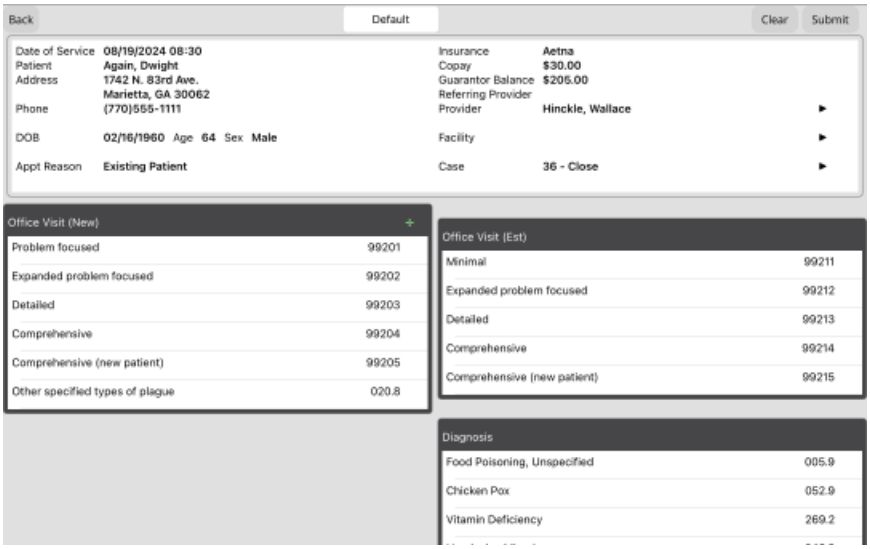


Figure 38. Enter Charges screen

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.

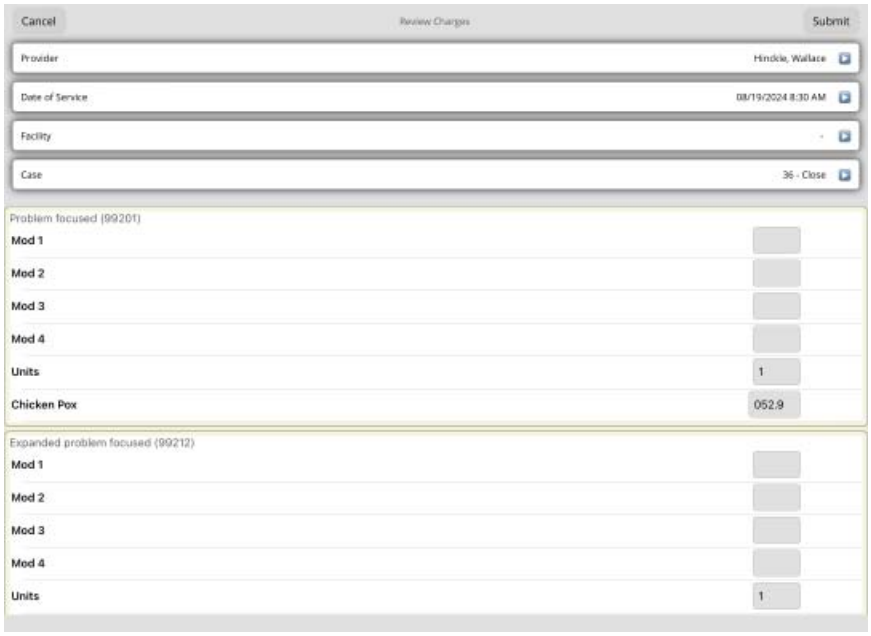


Figure 39. Review Charges screen

When you are done reviewing, tap Submit. Charges will appear on the Unprocessed Transactions screen in CGM MEDISOFT core.

Superbill sections unique to Add Charges (CGM MEDISOFT 25 and newer)

There are two features available on the Superbill that are unique to Add Charges (not found when creating or editing superbill templates): E/M Timer and MultiLink items.

Adding Sections in Charges

To use these features, you must enable “Allow edit during charge entry” on the Superbill. To activate this option:

1. On the Home screen, tap the Settings Gear. The Superbill opens.
2. Select the Superbill template you want to modify.
3. Select the Edit icon on a section header.
4. Tap Edit Section.
5. Enable Allow edit during charge entry.
6. Tap Done.
7. Tap Save on the Superbill Template screen

E/M Timer

When you tap the + on a section in Add charges, there is a Field Type that you can select to add the Evaluation and Management (E/M) Timer section to a superbill: Evaluation and Management (E/M) Timer.

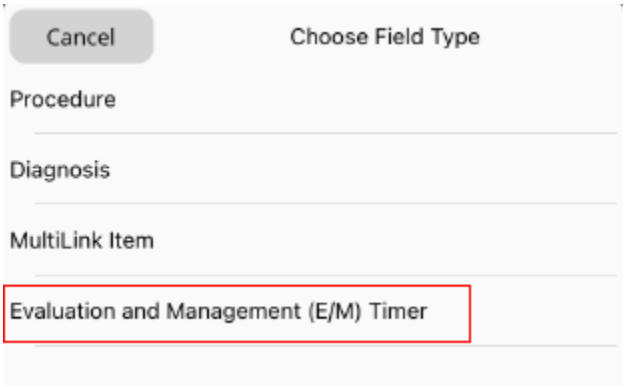


Figure 40. Choose Field Type screen

When you select this option, the timer will be added to the Superbill when adding Charges and the timer will start.and will be checked.

Figure 41. Timer Section

To stop the timer, tap the section. Tap again if you wish to restart the timer. If you are selecting a CPT code based solely on time, use the time to select the appropriate code.

Note: Beginning with CPT 2021 and except for 99211, time alone may be used to select the appropriate code level for the office or other outpatient E/M services codes (99202, 99203, 99204, 99205, 99212, 99213, 99214, 99215). Different categories of services use time differently. It is important to review the instructions for each category.

The time will be transferred as a note from the Mobile device to Unprocessed Transactions so there is a historical notation for the biller's review or later questions.

Workflow Recommendation

When you are creating charges, be sure to add the timer BEFORE you select or add diagnoses or procedures. Adding the time after you select diagnoses or procedures will clear the selected diagnoses and procedures since the screen needs to refresh.

Figure 42.

Multilink items

When you tap the + on a section in Add charges, there is an option: MultiLink Item.

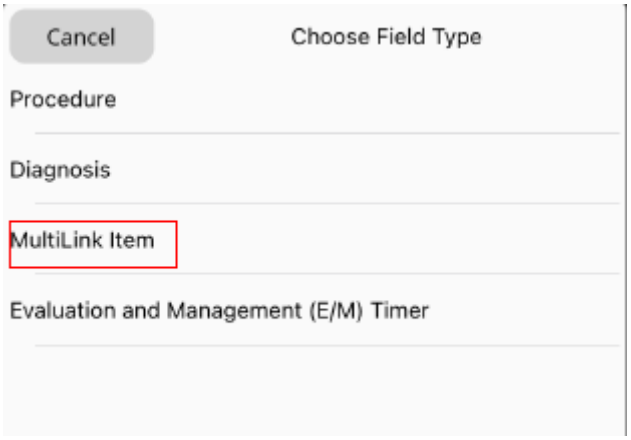


Figure 43. Choose Field Type screen

When you select this option, the Search MultiLink Items screen opens. Use this screen to search for and select a MultiLink item.

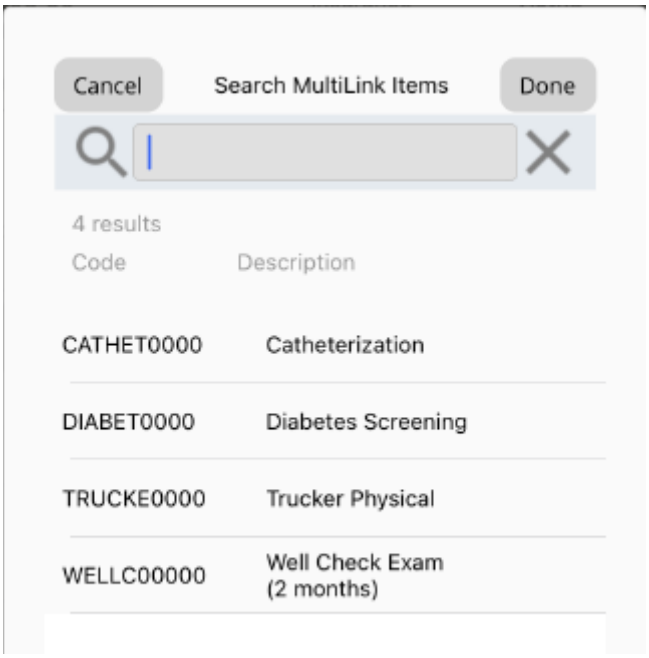


Figure 44. Search Linked MultiLink Items screen

Once you select a multilink item and tap Done, the new section will appear at the top of the superbill; The Section header will be the name of your Multilink from core. All of the transactions from that Multilink item will display and be selected.

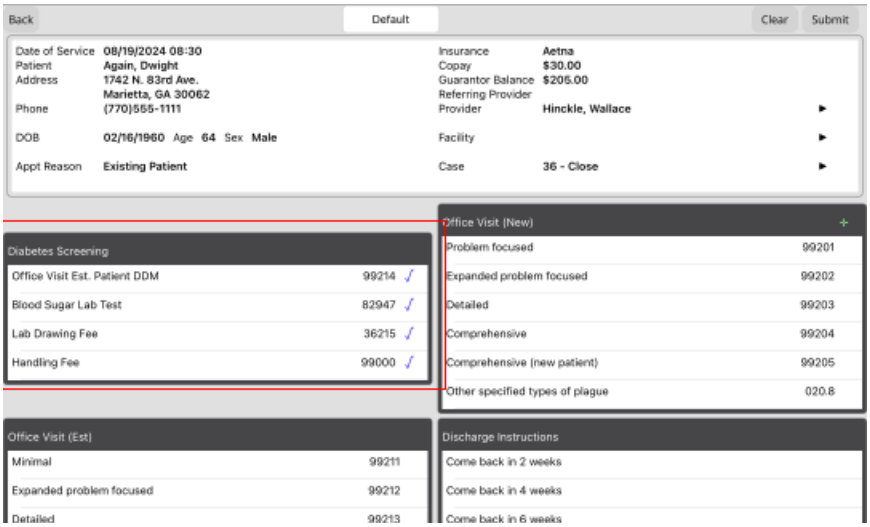


Figure 45. MultiLink item section

Notes

If the Units or Modifiers are specified in CGM MEDISOFT core for the procedures used in the Multilink, they will be used in CGM MEDISOFT Mobile just as if they had been on the superbill not in the MultiLink section.and will show on the Review Charges page.

Figure 46. Superbill - Pulled Diagnoses section

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.

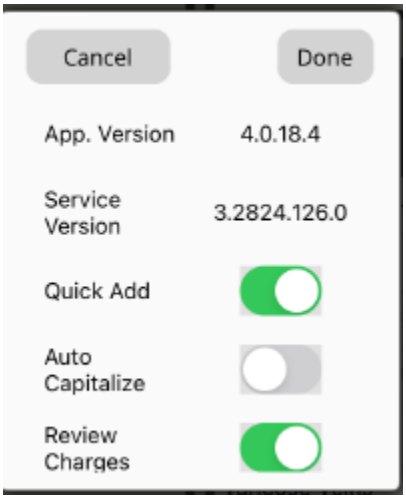


Figure 47. Settings screen

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.

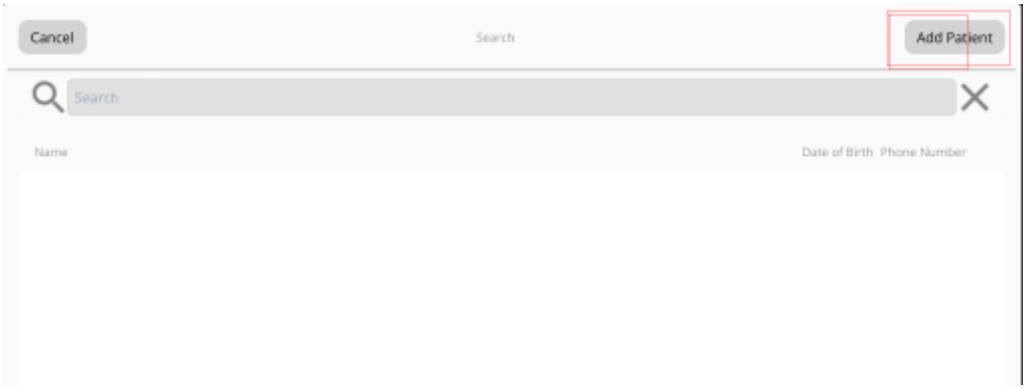


Figure 48. Search screen

Then, tap Add Patient.

Figure 49. 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 CGM MEDISOFT prior to sending claims.

Updating the Superbill Template

To maintain performance, CGM 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.

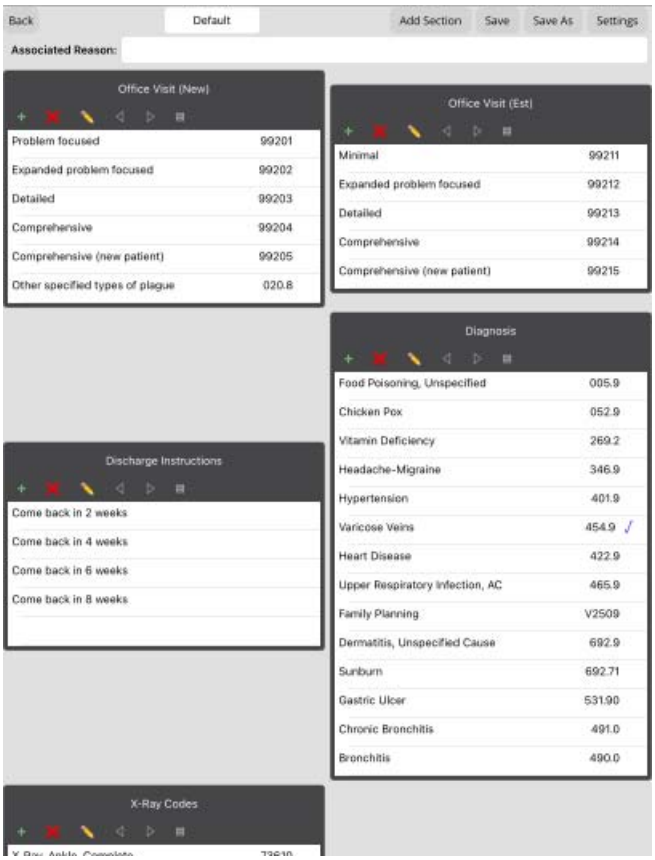


Figure 50. Superbill template

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.

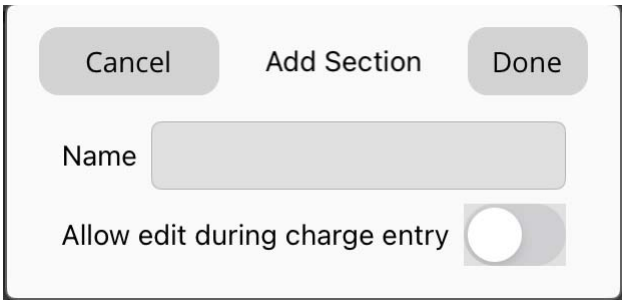


Figure 51. Add New Section screen

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

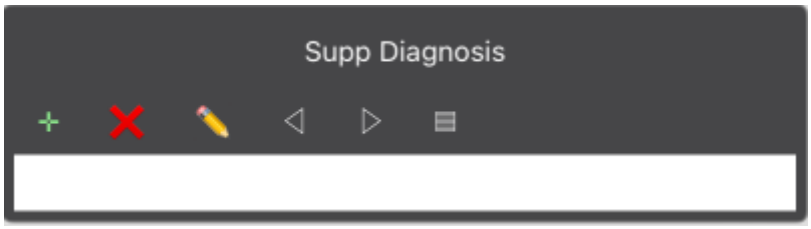


Figure 52. Superbill Template

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.
	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.

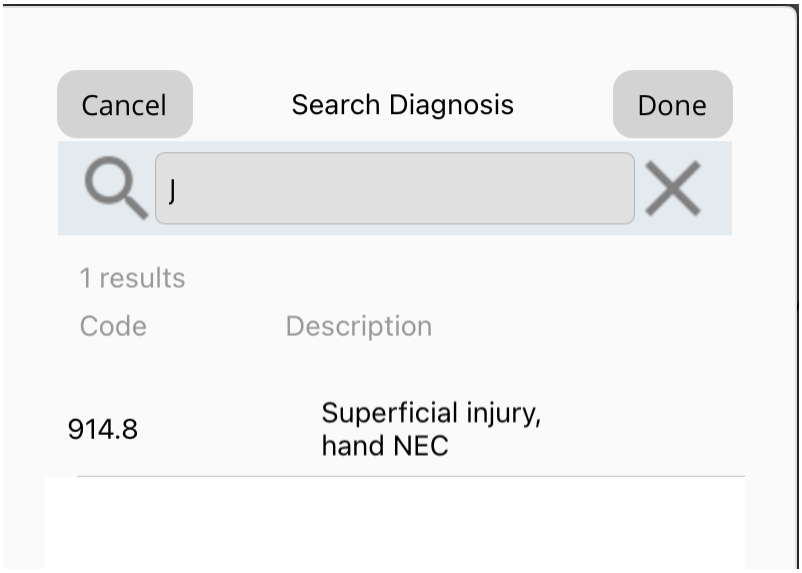


Figure 53. Search Diagnosis screen

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.

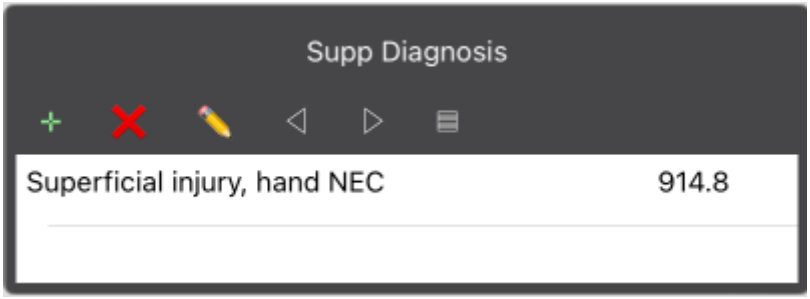


Figure 54. Section

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.

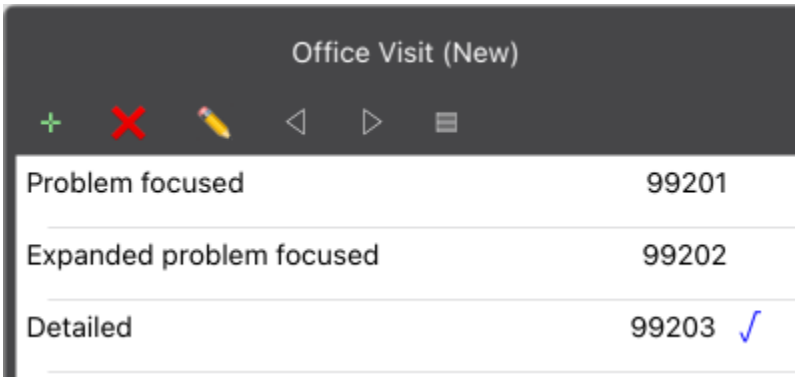


Figure 55. Office Visit section

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.

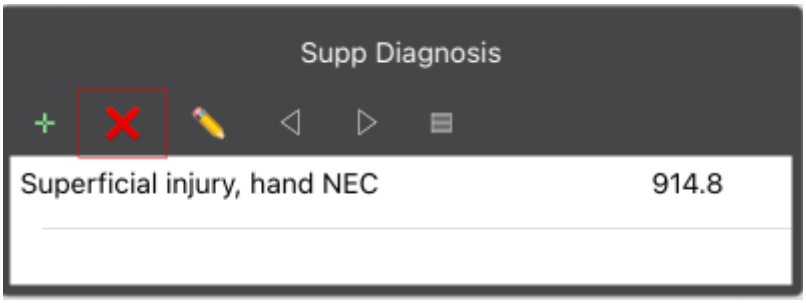


Figure 56. Section

The Remove screen appears.

Figure 57. 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 Settlings section. To open the Settings screen, tap the Settings icon. When the Superbill Template screen opens, tap Settings.

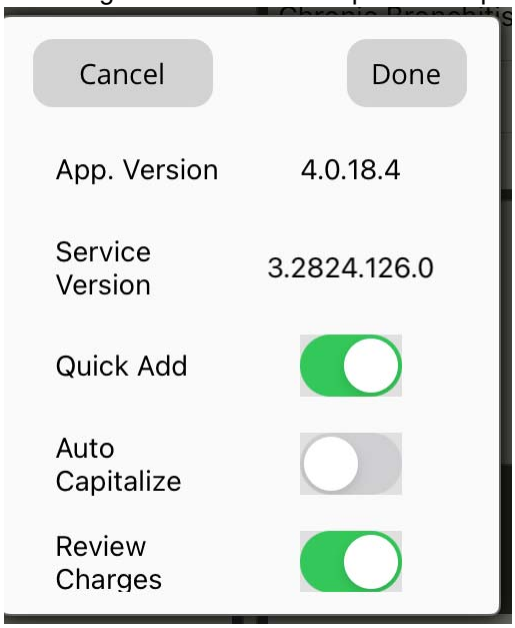


Figure 58. Settings screen

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 30. Note: When this option is set to On, Patient Intake is disabled on the app.
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.

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 CGM-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, CGM 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.

CGM 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 CGM MEDISOFT.

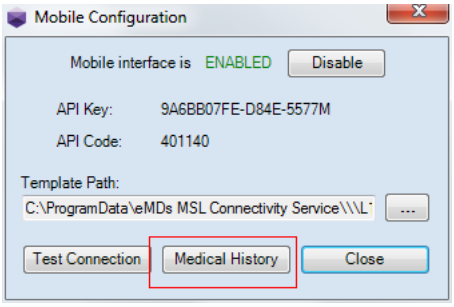


Figure 59.

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.

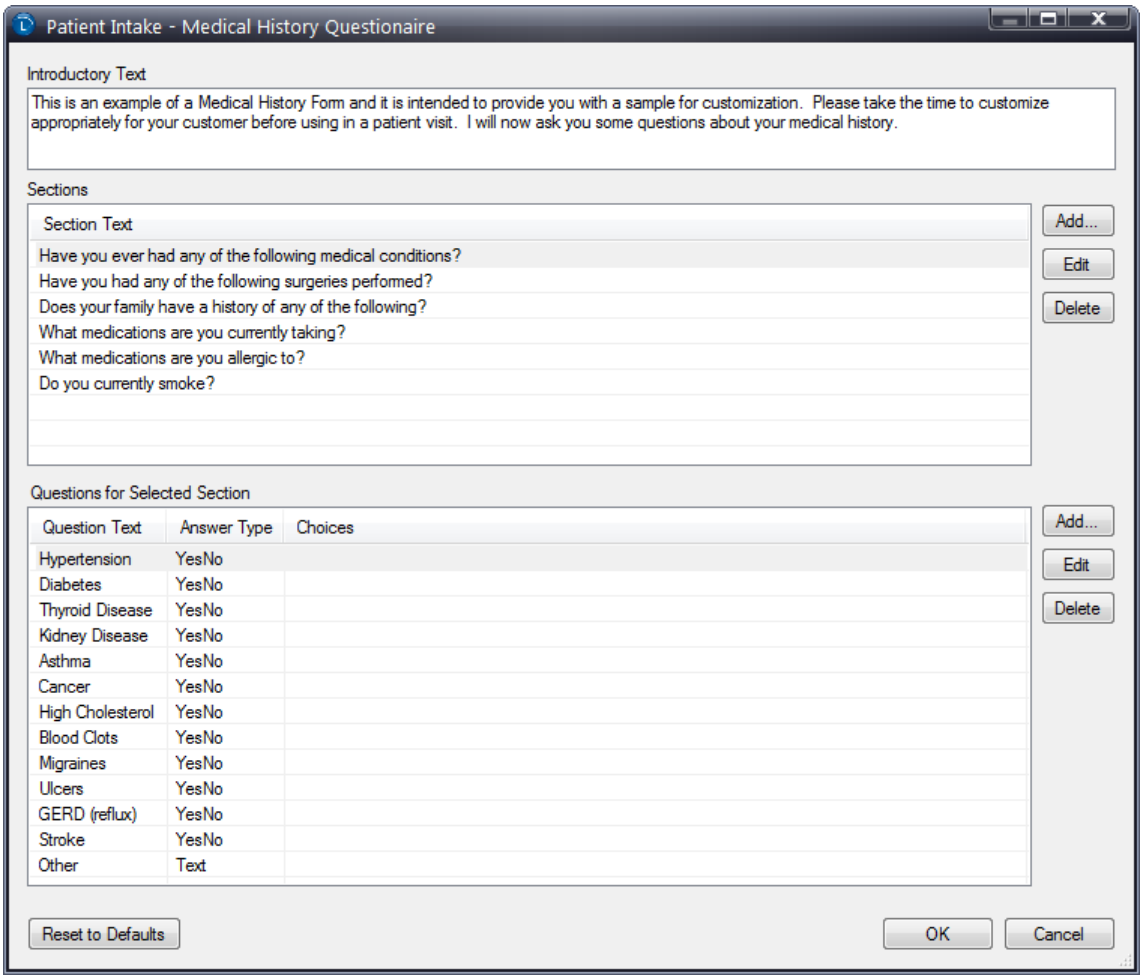


Figure 60. Patient Intake - Medical History Questionnaire screen

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 42.
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 42).
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.

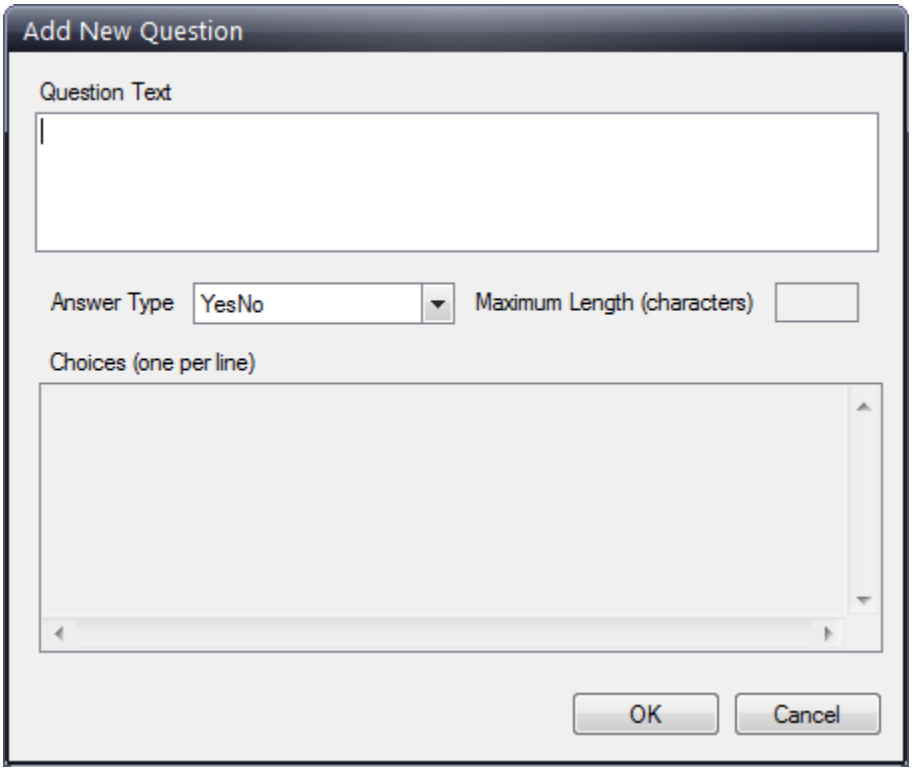


Figure 61. Add New Question screen

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. CGM 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 CGM 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 CGM 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 CGM 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.

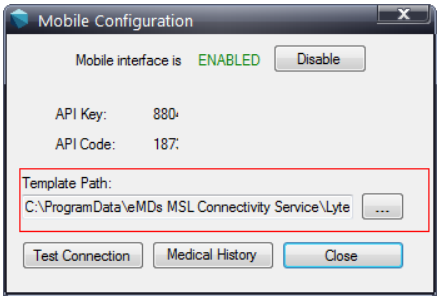


Figure 62. Mobile Configuration screen

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:

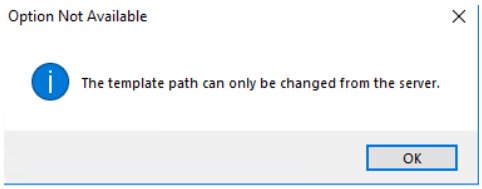


Figure 63. Option Not Available message

CGM-provided Forms

There are three default forms provided by CGM:

- 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>, <br>, <hr>, <b>, <i>, <ol>, <ul>, and so on. However, more complex HTML tags are not supported, such as <img>, <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 CGM 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 CGM 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 64. Form appearance

Below the picklist is displayed:.

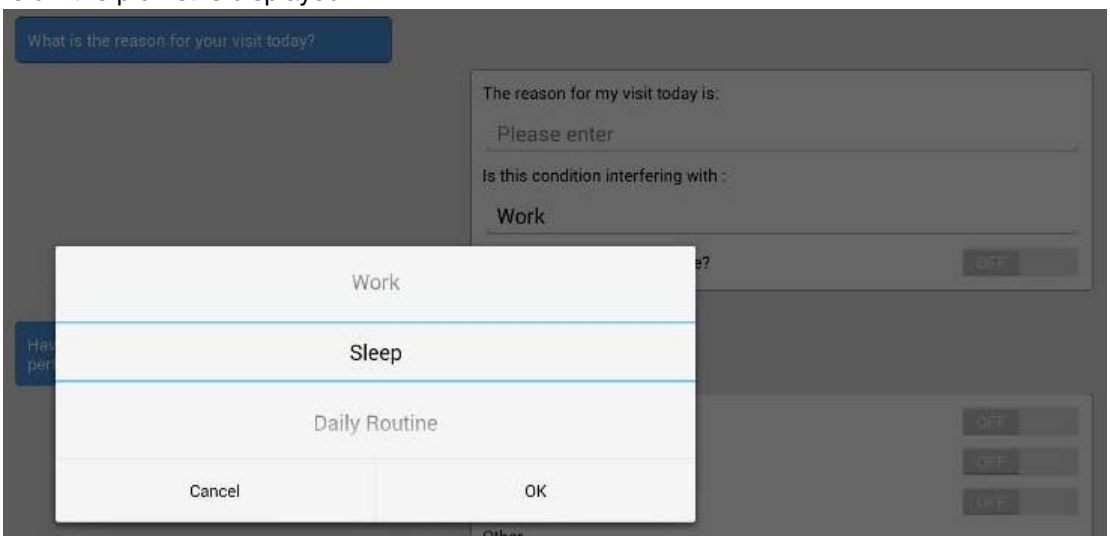


Figure 65. Picklist

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>
```

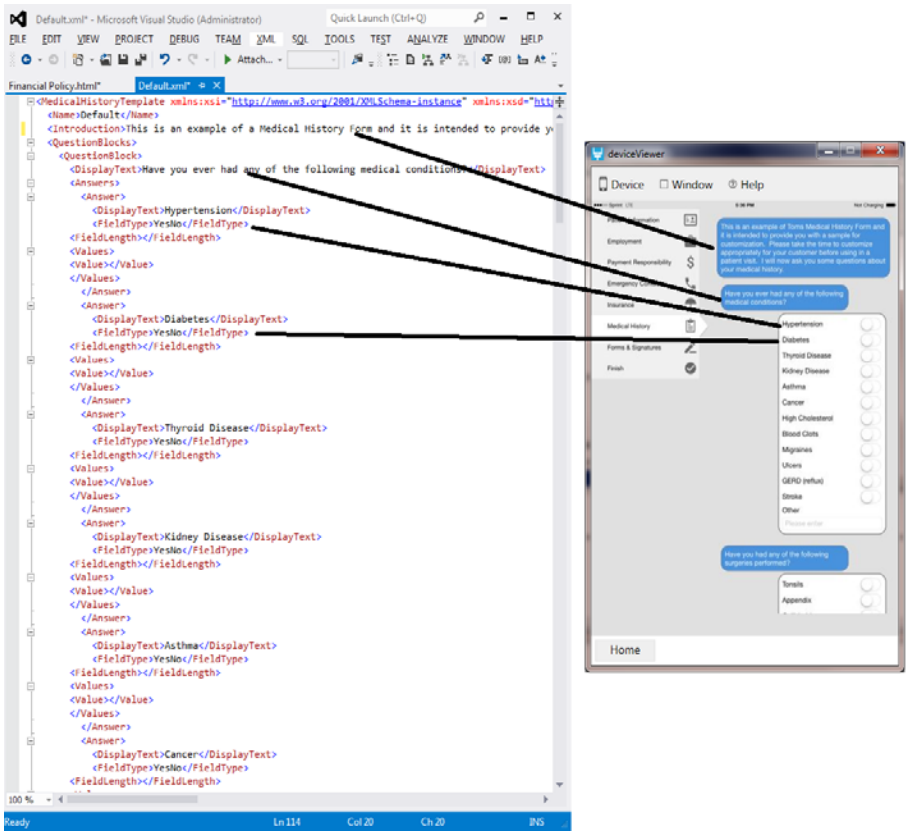


Figure 66. Code example

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

```
<QuestionBlock>

        How old is the patient?
```

```
</QuestionBlock>
```

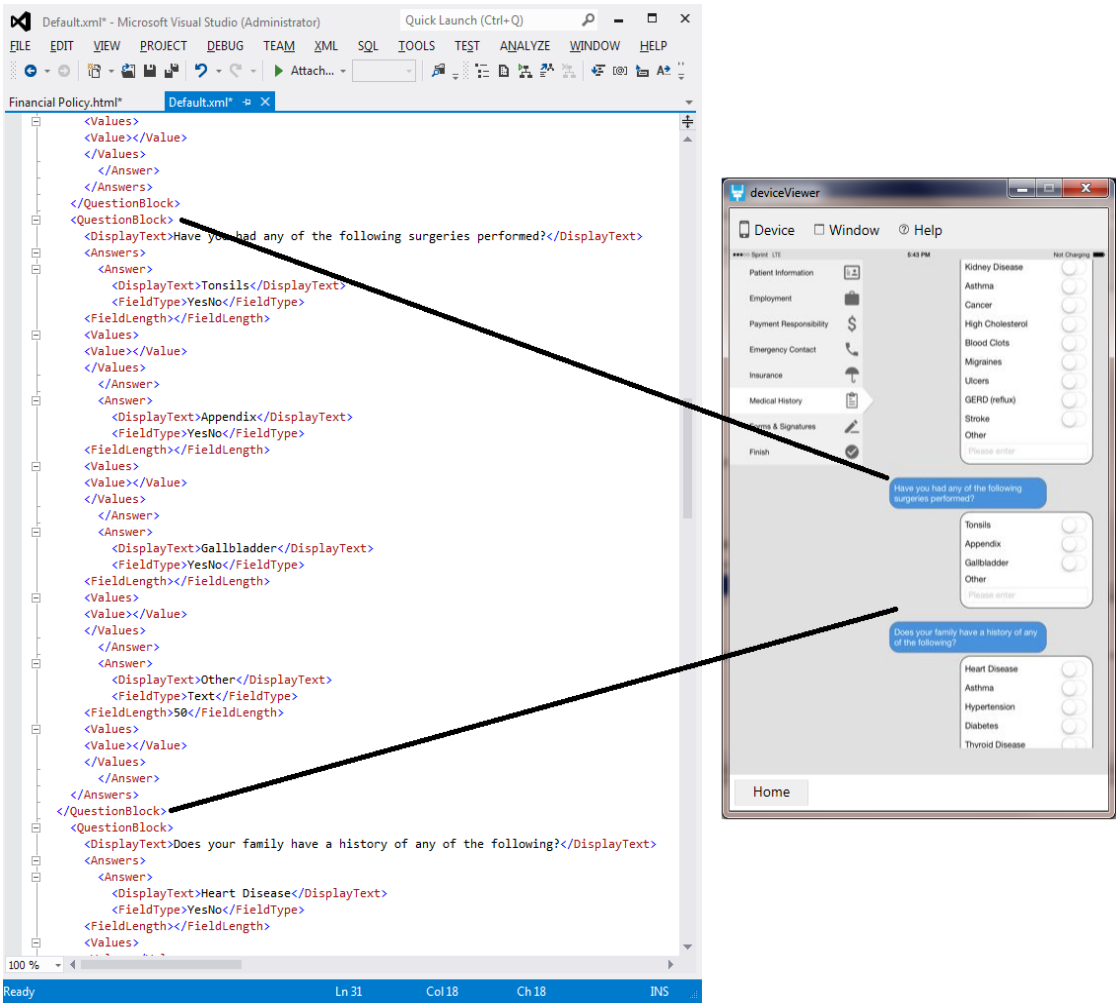


Figure 67. Code example

Free form text field:

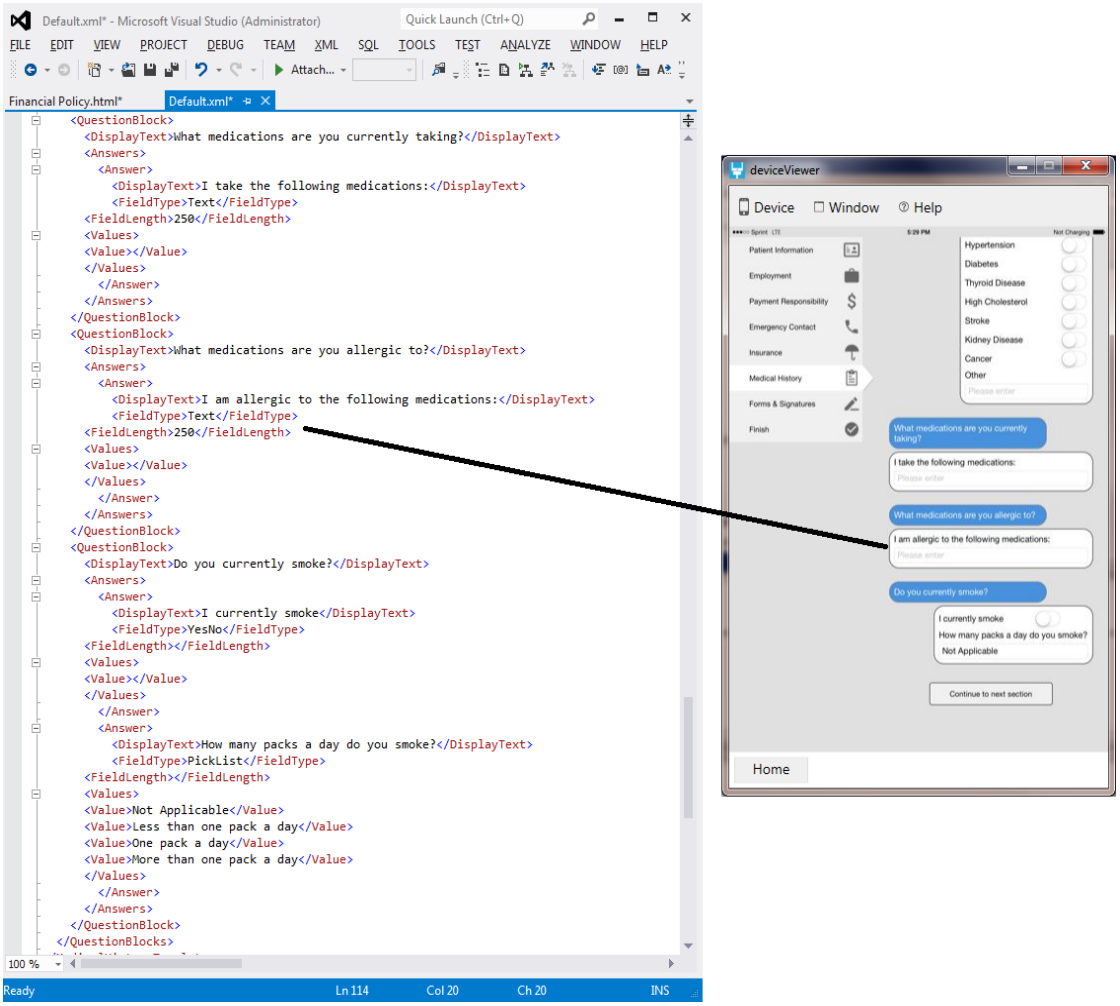


Figure 68. Code example - free form text

Yes/no answer field:

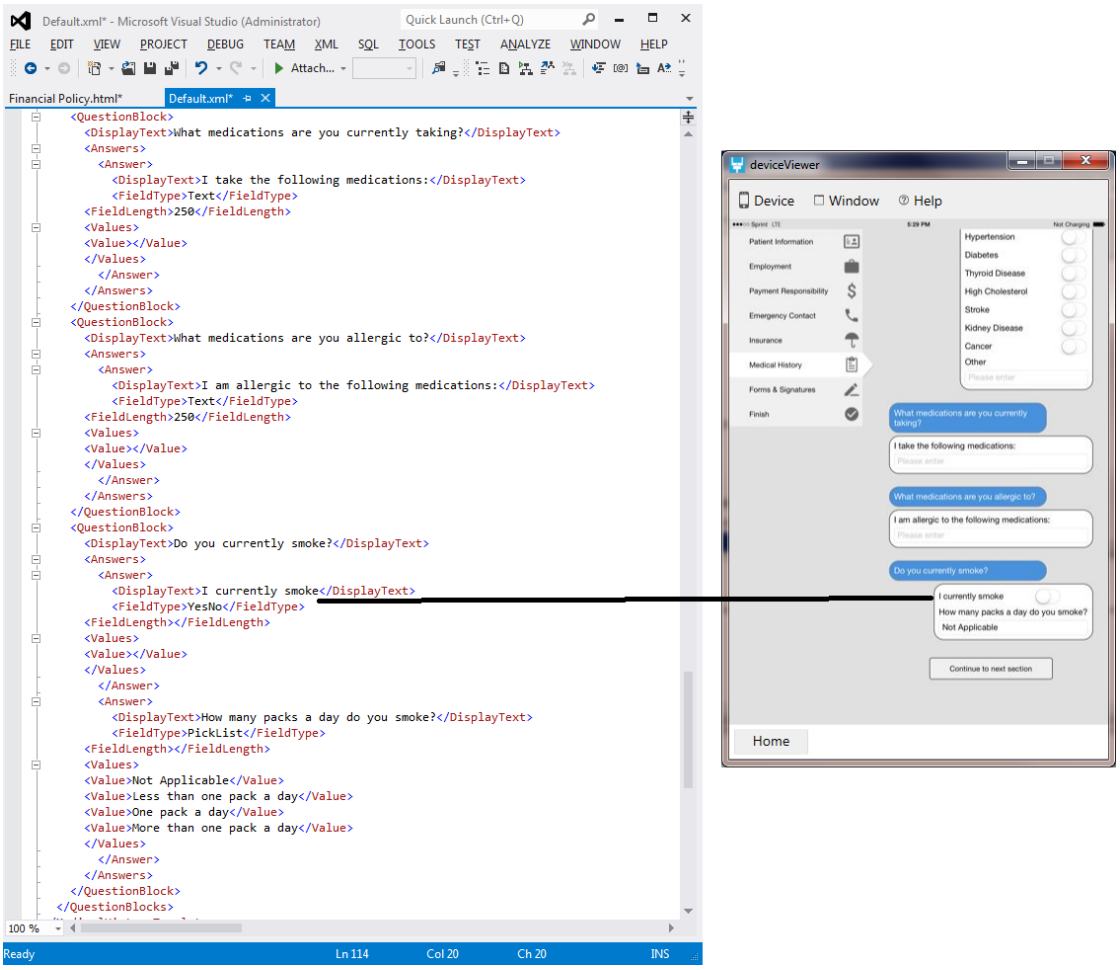
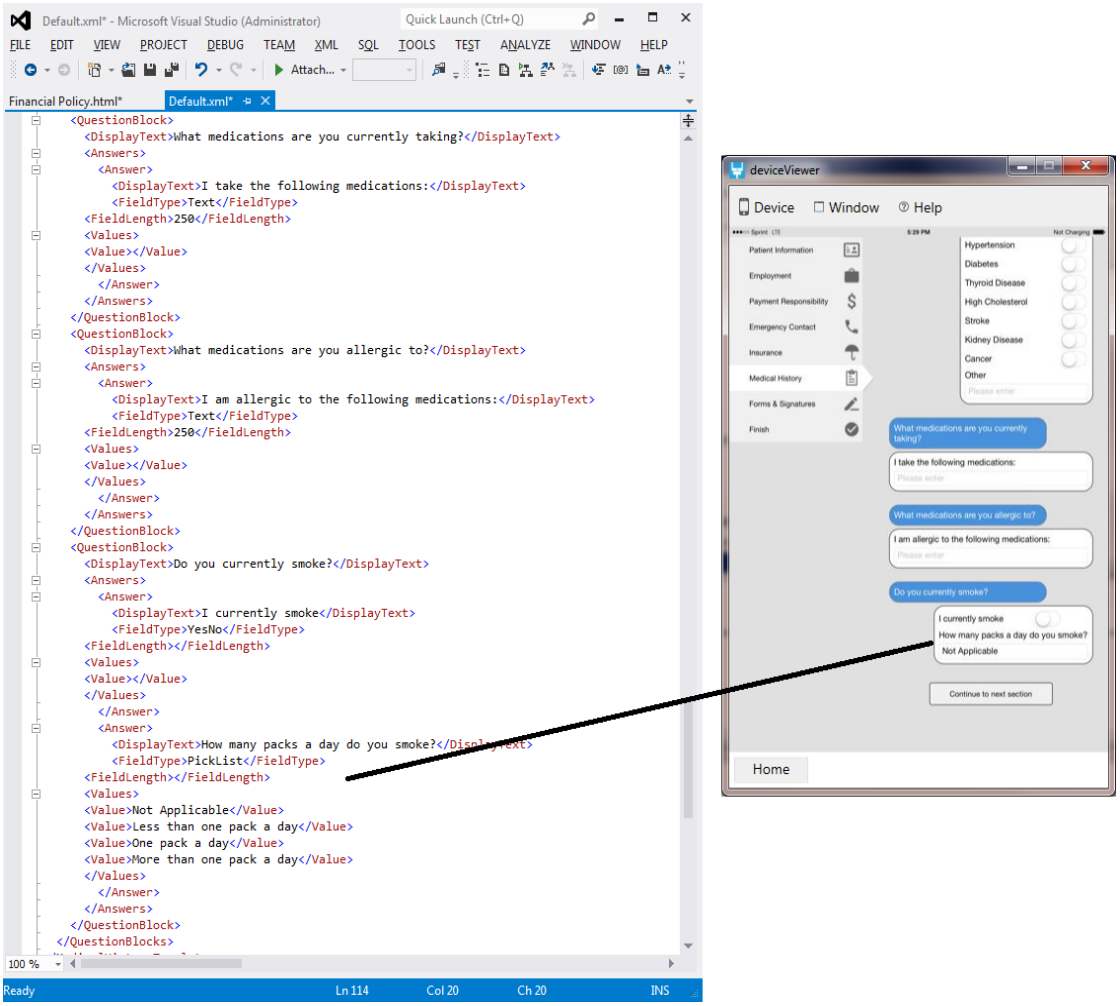


Figure 69. Code example - Yes/No Answer

Multi Select Field



Intake Form Example:

Paragraphs

```
<p>
    <b>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.</b>
```

```
</p>
```

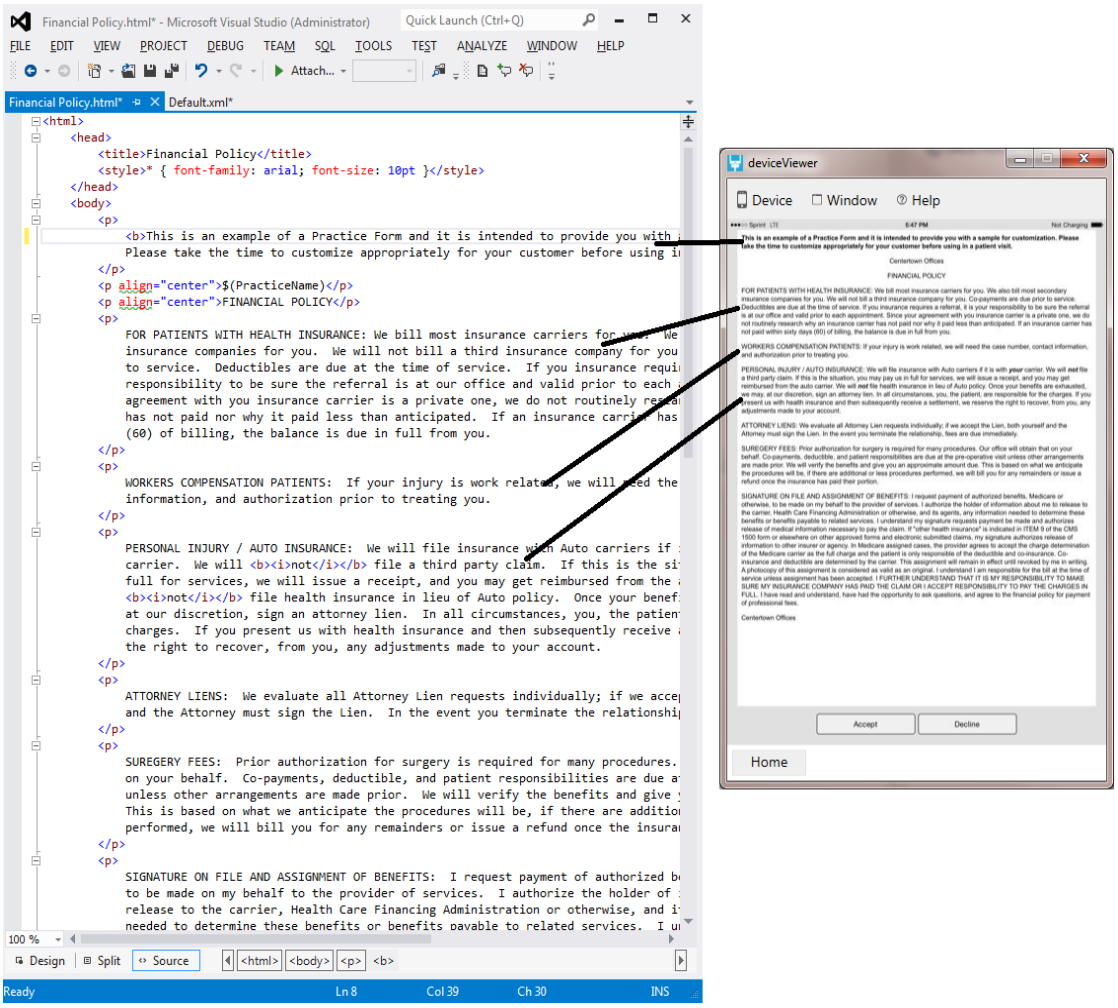


Figure 70. Paragraph example

Note: If the XML gets corrupted, the mobile application with 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>
```

```
<p>
        <span class="auto-style1">This</span>
</p>
```

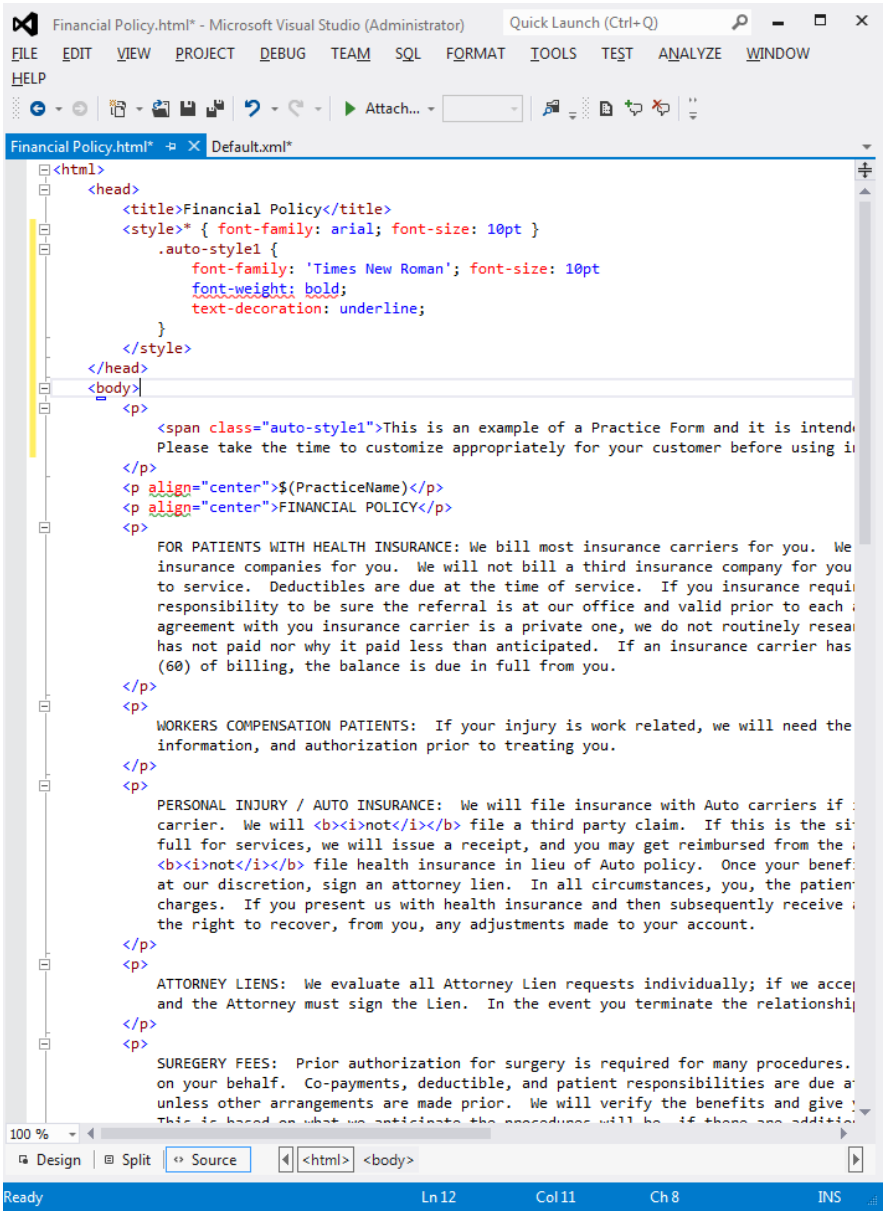


Figure 71. Special attributes example

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 CGM 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 CGM MEDISOFT desktop application.