

## **ONE POINT LESSON**

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## Installing Advanced Form Medtech Evolution

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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	Options Setup
2.	The Advanced Form window will open. Click: > Action > Import Form	Setup   Accounting   New   Action *     Accounting   New Web Form   Action *   Import Form I     Advanced   New Web Form   Ctrl+N   Form I     Advanced   New Web Form   Ctrl+Q   bestpi     Coding   Filter   Ctrl+F   Advance     Advance   Print   Ctrl+P   Advance     Advance   Print   Ctrl+A   Advance     Advance   Import Form   Ctrl+E   Access     Advance   Import Form   Ctrl+E   Activa     Advance   Import Form   Ctrl+E   Activa     Advance   Import Form   Ctrl+E   Activa     Advance   Import Form   Ctrl+E   Access     Advance   Import Form   Ctrl+B   Approxed
3.	Click 'Browse' to locate the Advanced Form you have saved on your computer: > Open the HPV file.xml > Click Validate > Click Import	Web Managemyrieam     Import Advanced Form     Import Data Dictionary     Data Dictionary file to Import:     Browse     Dictionary Details     Validation Staus :     Form code :     Description :     Validate     Import     Cancel     S
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   Advanced     Accounting   Action *   Publisher   All()     Accounting   Code   Form Name   HealthLink (HLK)   Form Name     Advanced Forms   Acc18   bestpractice - ACC18   ManageMyHealth   Medtech (MT)     Advanced Forms Manager   ActOP   Advance Care Plan   My Forms (L)   Pinnacle (PINN)     Advanced Forms Folder   ActP   Activate ManageMyHealth   ProCare (PC)   All(")     Advanced Forms Group   ADHB   ADHB referral   HealthLink   HealthLink

5.	Select and open on the advanced form required in the list.	Options   Advanced Forms Manager     Acco   *   Advanced Forms Manager     Accounting   *   Publisher   Pinnacle   Group     Advanced Forms   *   Ode   Form Name   Web   Publisher   Folder   Group     Coding System   Coding Term   HW   Healthy Weight   Pinnacle   HW   Pinnacle     Advanced Forms Manager   HW   Healthy Weight   Pinnacle   Pinnacle   Pinnacle     Advanced Forms Manager   HU   Healthy Weight   Pinnacle   Pinnacle   Pinnacle
6.	Click the 'Actions' tab. Tick the box next to 'Send the HealthLink Folder.' (Copy folder destination from another advanced form in PINN)	Web. Publisher. Folder   Group     Image: Summary Merge Text:   Send To:     None   Image: Summary Merge Text:     Image: Summary Merge Text:   Send To:     Image: Send To:   Send To:     Image: Send To:   Send To:     Image: Send To:   Send To:     Image: Send To:
	Select: > 'Create invoice to Account' (You can select or create a new A/C holder for invoicing) Click OK.	Send to Healthlink Folder: C:\HLINK\FF_out\PINNACLE Export Format: Full Details (Name+Address+Nhi) Create Invoice to Account: Inactive: OK Cancel Help