

Atlas Intake Apps

1. Sign Up for Feature

a) Visit <http://atlaschirosys.com/orders> to sign up for the Apps Feature

2. Verify and/or Update Atlas

a) Atlas version 4.26 or higher is needed to run the Apps feature

b) To Update:

- 1) Close all Atlas programs except your Main Computer
- 2) Under Utilities > Update Atlas and follow the onscreen prompts

3. Login to your Apps

a) Visit <http://www.atlaschirosys.com/apps> on your mobile device or computer

(If you are using an older version of Atlas you can access the site by visiting <http://www.atlaschirosys.com/classicapps>)

b) Login using your office credentials - if this is your first time logging in you should configure the system for use (see the details in the next section)

4. Configure your Apps

If this is your first visit to Atlas Apps, you should verify correct configuration and setup your personal preferences. Understanding the basic setup and usage can help you get more out of the feature.



There are two steps to configuring your Atlas Apps. First you will need setup the App system settings by clicking on the Settings options within the left menu.

General Settings:

When the page first loads you will be able to fill out your address, phone number, email, and language.

NOTE: The logo and address appear at the top of your custom intake forms on mobile devices and computers.

Upload Logo:

Upload your logo that will display in the top corner of your forms along with your address.

Templates:

There are three types of templates you can setup: Email, Introduction, Consent. Email templates are used when sending a form to a patient via email. The introduction is a place to provide any instructions or general information to the patient before they fill out the form. Not all forms will have or require an introduction. Similar to the introduction, the Informed Consent may not be required on all forms. This section is to provide any legal or regulatory verbiage that the patients need to consent to.

This brings us to the second step in configuring your Atlas Apps, the Form Tools . This can be accessed by clicking the Forms option within the left menu. At the end of each line you will notice the following icons:



We will go over all the options on this page but for now, the last option which looks like a wrench is the Form Tools.

Templates:

You are able to set the Email, Introduction, and Consent templates here. Simply assign one of the templates you created in Form Settings to the current form's tools.

Electronic Form Button Code:

A button, you can place on your website, which will link your patients directly to your electronic form.

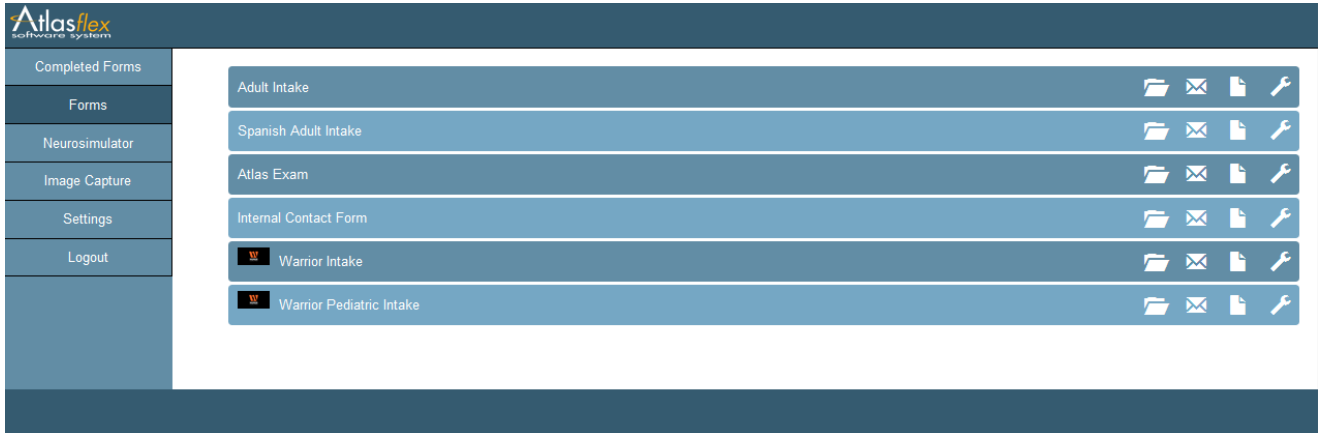
Print Only Button Code:

Place this button on your website so your patients can print a hard copy of the form to fill out and bring in to the office with them.

Form URL:

This is the direct URL code for the form. This can be copied for use if you prefer to use your own email client and similar situations.

5. Main Apps Screen



Forms:

This page lists all the forms you have attached to your account. The Atlas default forms are included in addition to any customized forms you request.



Load Form:

This will load a blank electronic form for you patients to fill out. Clicking directly on the form name or bar will also load the form.



Load/view PDF form:

The PDF icon will load a printable PDF version of the form for those patients who still insist on filling out a hard copy.



Email:

The email icon allows you to email a link to the form. It will first load the template you have attached to the form in question, which you can edit if needed before sending out.

this

Completed Forms:

This page will list any forms that your patients have already filled out. You are presented with three options on page.



Load Form:

This will load the electronic form with your patient's information filled out. Clicking directly on the form name or bar will also load the form.



Load/view PDF form:

The PDF icon will load a printable PDF version of the form with your patient's completed answers.

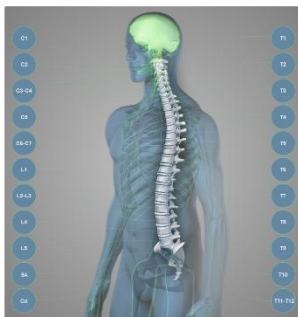


Delete:

Permanently deletes the completed form.

Neurosimulator:

The Neurosimulator App is available to educate your patients.



Patient Picture Option:

If you have a webcam connected to your computer or a tablet/mobile device with a camera you can capture a Patient Picture and sync instantly with Atlas.

- Click the Camera Icon (upper, right corner)
- Enter the Patient ID number from Atlas
- Click Capture to capture the picture from your device
- When you are ready, click Save to sync the picture with Atlas

The image will be imported to Atlas the next time you run the Sync function. This is explained in detail near the end of this document.

Exam Apps:

Coming Soon - The Exam App will also be part of this same format. With access directly from the VTC or Flex system. Please refer to the Exam Form PDF to outline how that feature works.

6. Usage - Setup and Tips:

There are many ways to use the intake form feature. Offices can choose to use iPad or tablets in their office, or they can opt to let Patients fill in the forms from their own home on their choice of device.

If you are using Atlas Intake Apps in your office disable Form-Auto Complete options in your device to ensure sensitive patient data is not improperly shared to other patients

Chrome: Settings > Show Advanced > Passwords and Forms -- uncheck option to 'Enable Autofill to fill out web forms in a single click'

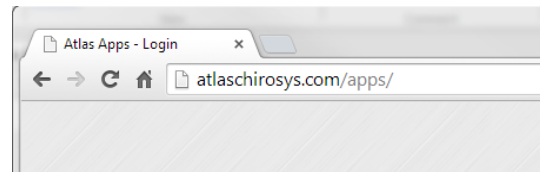
Internet Explorer: Tools > Internet Options > Content > Autocomplete -- uncheck 'Forms' and 'Usernames and Passwords on forms'

Firefox: Options > Privacy > Firefox Will: 'Use Custom Settings for History' - and in the next screen Disable the option 'Remember Search and Form History'

Android: Menu > Settings > Language and Keyboard > Touch Input > Text Input -- Go to Settings > General > Keyboard and turn off 'Auto-Corrections'

From iPad or Tablet: open the browser on your iPad or Tablet and navigate to <http://atlaschirosys.com/apps>
Enter your login details and proceed with using the feature. After your Patient completes the form they will be directed to hand the device back to you to complete the sync.

From In Office Computer or Laptop: open your choice of browser and navigate to <http://atlaschirosys.com/apps>
Enter your login details and proceed using the feature. This computer does not need to run Atlas and does not need to be hard wired into your network.



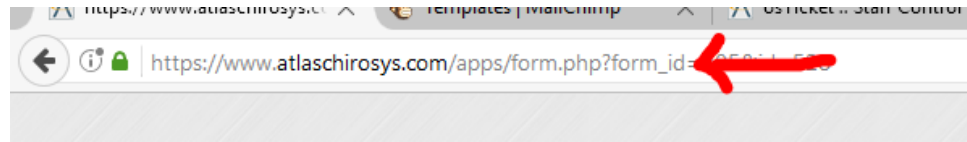
Direct Patient to your Website: if you have setup a link on your website using the HTML code snippet, you can send patients to your site to complete and submit their intake form. You may need to contact your website administrator to configure this option.

Email Link to Patient from Apps: you can log into your online Apps and email a link for your form directly to the Patient.
On Main Page - Forms --Click on the Email icon then enter the Patient name and email to send a link to the Adult Form same function for all forms -- enter the Patient name and email to send a link to the Child Form

Email Link to New Patient from Atlas: Scenario - Patient Joe calls to create a new patient appointment. Your CA creates a New Patient profile in Atlas (refer to the User Manual for details) and books the NP appointment. Joe would like to fill in the intake form ahead of time and from the comfort of his home. You can email him a "welcome email" from within Atlas that will include a link to the intake form, your contact information and any other important information for your new patient. This can be completed using a Template to save you and your staff time.

1. To determine your unique web address for your form - go to your form online, then then copy the web address in your bar and place in your email as a link. Copy the entire link. As the link has a unique code to

match to your clinic and Atlas to sync.



2. Copy the URL contained in the browser bar.
NOTE: Your URL will be different than the example based on your ID number
3. Go into your Atlas software
Setup > Templates > Email and Messaging -- to create a new template.
4. Click ADD (at the bottom) to add a new Email Template
 - Type a name for this template (example: Adult Intake Email)
 - Choose Email as Type
 - Type in a Subject line for this email
 - Add an Attachment if needed (example: clinic event calendar, etc)
 - Type in the body of the email and include (paste) the link from step 1
 - Click Save (at the bottom) when complete
5. USE: after entering the New Patient and creating their Appointment, from the Personal Tab click Email and use the template you created.

7. To Sync In Atlas:

The sync process is initiated from within the Atlas software.

1. Under the CASH button (upper, left corner) click Form Sync - this will open the App Sync Window

To see the icon labels click the question mark in the upper, right corner



Click to preview the Patient form



Click to upload the form to the online server for editing - patient will need to resign documents with signatures (with warning)



Deletes form (with warning)

Refresh - checks online server for new/edited forms

Logs - presents options for date range and type of report (failures, success or all)

Print - generates the log report

Form Types - currently there are 4 types: Intake Form, Pediatric (intake) Form, Patient Picture, Contact Form (Lead)

Last Name	First Name	Form Type	
Smith	Sam	Intake Form	[Preview] [Upload] [Delete]
Smith	Shelly	Pediatric Form	[Preview] [Upload] [Delete]

Please click on a name above to begin importing.

Refresh Logs Print

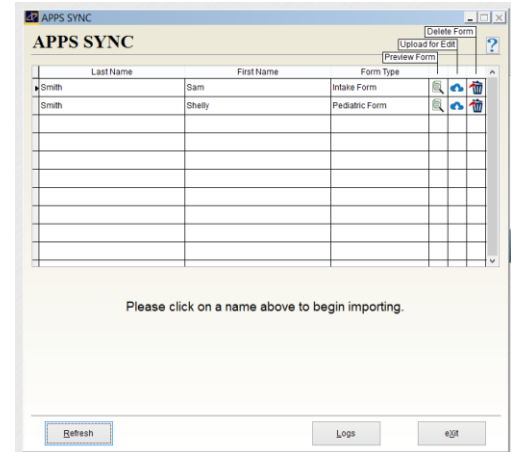
2. Locate the patient intake form you want to sync to Atlas
Clicking on the Patient Name will load the Patients details or images on the left side for review

Find Patients - opens the standard Find Patient window from Atlas. Use this option to compare details from an existing profile with the Form Details.

Add New - creates a new Patient record and attaches the form (not available for Patient Picture)

--NOTE: contact form will create a new record with the status of LEAD in the system

Cancel Match - returns to the Main Forms grid



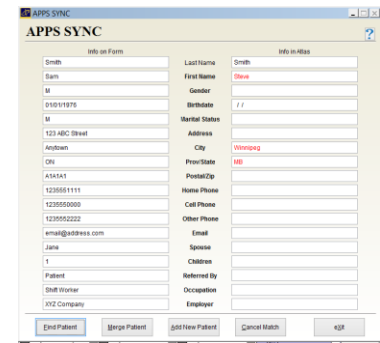
3. Choose to match the form with an existing Patient Profile or create a new Patient Profile

-Labels will be bolded for any field not matching the original form

-Values will turn red for fields not matching with the Atlas patient

Merge Patient - overwrites the existing patient information with the information provided in the form

Attached forms will appear on the patient file under Documents and can be re-uploaded for editing if needed.



8. Setup Completed Form to Edit

Users have the ability to send a completed form (one already synced into Atlas) back to the 'cloud' for editing by the Patient. The forms can be updated with a new address, additional information can be added regarding health history or more.

NOTE: Patients editing their completed forms will have to Agree to the Consent to Care section again and electronically sign the form again before resubmitting.

NOTE: because of the nature of the form edit feature, editing can only be done 'in office' on a tablet or computer.

To Edit:

1. Open the Patient Profile in Atlas
2. Go to the Patients Image tab under 'Documents'
3. Find the 'Intake Form' document and right click for menu
4. Select 'Flag for Edit'
5. On your mobile device or computer navigate to <http://atlaschirosys.com/apps>
6. Login with your credentials
7. On the main page, under the completed forms tab select you will see the form in the listing.
8. In this section you will see a list of forms ready for edit - select the Patient you want to edit and it will load their form on the screen

NOTE: After editing the form will automatically attach itself back to the original Patient without the user manually finding the patient. The sync process will complete this step.