

# Installing the CFOP Claims Form

## Download:

Go to <u>https://www.procon.co.nz/wrhn.html</u> and download the **CFOP Claims Form Installer** form installation. (**Right**-click on the appropriate "Download" button and select "Save link as" (Chrome) or "Save target as" (IE).

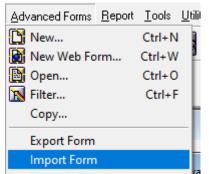
Make sure you know where you put them!

#### For MedTech32:

- 1. Click on Setup
- 2. Hover over Advanced Forms then choose Advanced Forms Manager (screenshot attached)

| <u>S</u> | stup M <u>a</u> nageMyHealth | C <u>o</u> nnectedCare | C <u>B</u> IT |          | <u>W</u> indow | <u>H</u> elp | Support | Chat |   |
|----------|------------------------------|------------------------|---------------|----------|----------------|--------------|---------|------|---|
|          | ACC                          |                        |               | ۲ 🏹      | 0              | fi 🛃         | 3 🖭     | F    | 6 |
|          | Accounting                   |                        |               | ١Ē       |                |              |         |      | - |
|          | Advanced Forms               |                        |               | ۲.       | Coding         | System       | ns      |      |   |
|          | Agencies                     |                        |               | •        | Coding         | Terms        |         |      | h |
|          | Appointment                  |                        |               | •        | Advance        | d Forr       | ns Mana | aer  |   |
| -        | Clinical                     |                        |               | <u>+</u> |                |              |         | .9   |   |

Clinical
 Click on the Advanced Forms Menu and choose Import Form



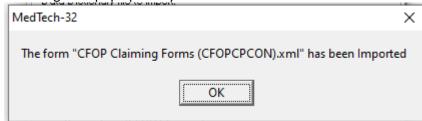
6. A small dialog window will open to let you choose the installer for CFOP. Click on **Browse** to choose it. Then click on **Validate**, if the status says **"All OK**" click **"Import**".

| Import Advanced Form  |  |  |  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|--|
| Import Data Dictionary<br>Data Dictionary file to import:       |  |  |  |  |  |  |  |  |  |  |
| C:\Users\arthu\Desktop\source-codes\Installation Package Browse |  |  |  |  |  |  |  |  |  |  |
| Dictionary Details  |  |  |  |  |  |  |  |  |  |  |
| Validation Status: All OK                                       |  |  |  |  |  |  |  |  |  |  |
| Form Code: CFOPC.PCON   |  |  |  |  |  |  |  |  |  |  |
| Description: CFOP Claiming Forms                                |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |
| ⊻alidate <b>Import Cancel</b>                                   |  |  |  |  |  |  |  |  |  |  |

7.

5.

8. A message will pop up to say that the installation was a success



- 9.
  10. The form in now installed, usually it is instant, but if there's an error when opening the form, try to Exit MedTech and Login back.
- 11. If an error occurs please email me with a screenshot of the error  ${}^{igodol o}$

#### For Evolution:

1. Click on "File" then "Options", for newer ones, click on the Logo then "Options"

| -         | *                            |  |  |  |  |  |  |  |
|-----------|------------------------------|--|--|--|--|--|--|--|
| -7        | Log <u>o</u> n               |  |  |  |  |  |  |  |
| P         | Lock Ctrl+Alt+L              |  |  |  |  |  |  |  |
| <b>-</b>  | Log O <u>f</u> f             |  |  |  |  |  |  |  |
| $\otimes$ | Close                        |  |  |  |  |  |  |  |
|           | <u>P</u> rint Setup          |  |  |  |  |  |  |  |
| <b>_</b>  | C <u>h</u> ange Password     |  |  |  |  |  |  |  |
| 1         | Change <u>U</u> ser Ctrl+F12 |  |  |  |  |  |  |  |
| 7         | Configure Workspace          |  |  |  |  |  |  |  |
| ٥         | User Preferences             |  |  |  |  |  |  |  |
| •         | Options                      |  |  |  |  |  |  |  |
| EXIT      | Options<br>E <u>x</u> it     |  |  |  |  |  |  |  |
|           |                              |  |  |  |  |  |  |  |

- 2.
- 3. Click on Advanced Forms then choose Advanced Forms Manager, then click Action and choose Import Form.

| 🔅 Options  |      |              |          |          |    |
|------------|------|--------------|----------|----------|----|
| Setup      |      |              | ~        |          |    |
| ACC        |      | ¥            | <b>^</b> | Action • |    |
| Accounting |      | New          |          | Ctrl+N   | Fo |
| Advanced I | Ċ,   | New Web Form |          | Ctrl+W   | A  |
| Coding S   |      | View         |          | Ctrl+O   | A  |
| Coding 1   | 7    | Filter       |          | Ctrl+F   | A  |
| Advance    | 2    | Print        |          | Ctrl+P   | A  |
| Advance    |      | Сору         |          |          | A  |
| Advance    |      | Export Form  |          | Ctrl+E   | A  |
| Advance    |      | Import Form  |          | Ctrl+I   | AI |
| Import Fo  | rm ( | Ctrl+l)      |          | ALC4     | A  |

Select the installer for CFOP by clicking on "Browse", then click Validate, if the "All OK" status is shown, click Import. (if an error occurs please screenshot and email it to me, thanks)

|    | 🔅 Import Adva   | nced Form     | ×      |  |  |  |  |  |  |  |  |  |
|----|---|---------------|--------|--|--|--|--|--|--|--|--|--|
|    | Import Data Dic<br>Data Dictionary fil  | -             |        |  |  |  |  |  |  |  |  |  |
|    | C:\Users\arthu\Desktop\source-codes\Installation Packages\CFOP Cl Browse  |               |        |  |  |  |  |  |  |  |  |  |
|    | Dictionary Details  |               |        |  |  |  |  |  |  |  |  |  |
|    | Validation Staus : All OK   |               |        |  |  |  |  |  |  |  |  |  |
|    | Form code :   | CFOPC.PCON    |        |  |  |  |  |  |  |  |  |  |
|    | Description : CFOP Claiming Forms   |               |        |  |  |  |  |  |  |  |  |  |
| 6. |   | Validate      | Cancel |  |  |  |  |  |  |  |  |  |
|    | If everything goes well a message will pop-up   |               |        |  |  |  |  |  |  |  |  |  |
|    | Medtech Evolutio  | n Application | ×      |  |  |  |  |  |  |  |  |  |
|    | The Data Dictionary "CFOP Claiming Forms (CFOPCPCON).xr<br>has been imported<br>You must exit MedTech Evolution for these changes to take<br>effect |               |        |  |  |  |  |  |  |  |  |  |
| 8. |   | ОК            |        |  |  |  |  |  |  |  |  |  |

8.
9. After Installing, Open the Advanced Form Manager -> CFOPC -> And tick the "Create Invoice to Account" Select the account by clicking on the ".."

|          |  |  |                 | · · · · · · · · · · · · · · · · · · · |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
|----------|--|--|-----------------|---------------------------------------|-----------------|----------|--------|-------|-------|-----|-----|-------|--------|----|-----|---|--|--|
| Code /   | Form Name                              | Web                                    | Publisher       | CFOP Claim                            | ina Forms       |          |        |       |       |     |     |       |        |    |     |   |  |  |
| ACARE    | Aged Care Registration                 | Web                                    | ManageMyHea     |                                       | -               |          |        |       |       |     |     |       |        |    |     |   |  |  |
| ACC18    | ACC18                                  |  | Accident Comp   | Main Action                           | <b>s</b> Fields | Field    | Rules  | For   | m Rul | les | Us  | er Se | ttings | Au | dit |   |  |  |
| ACCACT   | Activate ACC                           | Web                                    | ManageMyHea     |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| ACP      | Advance Care Plan                      | Web                                    | ManageMyHea     | User Message:                         |                 |          |        |       |       |     |     |       |        | 1  |     |   |  |  |
| ACTOP    | ${\sf ActivateManageMyHealthPayments}$ | Web                                    | ManageMyHea     |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| ACTPR    | Activate ManageMyHealth                | Web                                    | ManageMyHea     |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| ACWELSCL | Access Healthscope eOrder              | Web                                    | ManageMyHea     |                                       |                 |          |        |       |       |     |     |       |        | 1  |     |   |  |  |
| ADHB     | ADHB referral                          |  | Auckland Distri | Summary Merg                          | e Text: Ser     | nd To:   | None   |       |       |     |     |       |        |    |     |   |  |  |
| ALC4     | Alcohol Consumption V4                 |  | Procon Limited  | Arial                                 |                 | -        | 10     | -     | в     | Ι   | U . | Α,    | A -    |    | -   |   |  |  |
| BAYAUDIO | Refer to Bay Audiology                 | Web                                    | ManageMyHeal    |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| BREF     | Base Referral                          |  | Medtech         |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| CAF      | Contraception Advanced Form            | raception Advanced Form Procon Limited |                 |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| CEMAIL   | Compose Email ManageMyHealth           | Web                                    | ManageMyHeal    |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| CFOPC    | CFOP Claiming Forms                    |  | Procon Limited  |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| COMPSRV  | Completed Surveys                      | Web                                    | ManageMyHea     | <u> </u>                              |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| DFRA     | Diabetes Foot Risk Assessment          |  | Procon Limited  | Send to He                            | Ithlink Fold    | er:      |        |       |       |     |     |       |        |    |     |   |  |  |
| DHBCWS   | Access Waikato DHB CWS                 | Web                                    | ManageMyHea     | C:\HLINK\XML                          | out             |          |        |       |       |     |     |       |        |    |     |   |  |  |
| DWHAUDIO | Refer to Dilworth Hearing              | Web                                    | ManageMyHeal    | Export Format:                        | Full Detai      | ils (Nam | e+∆ddr | ess+1 | Nhi)  | -   |     |       |        |    |     |   |  |  |
| ELAB     | Healthlink eLab                        |  | HEALTHLINK      | Create Invo                           |                 | -        |        |       | ,     |     |     |       |        |    |     |   |  |  |
| ETHERAPY | E-Therapy                              | Web                                    | ManageMyHea     |                                       |                 |          |        |       |       |     |     |       |        |    |     |   |  |  |
| ETHRPSTF | E-Therapy Staff Registration           | Web                                    | ManageMyHea     |                                       |                 |          |        |       |       |     | ••• |       |        |    |     |   |  |  |
| FFSA     | Fit for Surgery Assessment             |  | Procon Limited  |                                       | _               |          |        | -     |       | _   |     |       |        |    |     |   |  |  |
| GENERAL  | General referral                       |  | Medtech         | Inactive:                             |                 |          |        | L     | 0     | К   |     | C     | ancel  |    | Hel | ρ |  |  |
| GENREF   | General Referrals                      | Web                                    | ManageMyHea     |                                       |                 |          |        | _     | _     | _   | _   | _     | _      |    | _   | _ |  |  |

- 12. Exit Evolution and login again.
- 13. If any error occurs when installing, please screenshot the error and email it to me please.

Thanks 😊

CREATING THE SERVICE CODES

FOR MEDTECH32

### Setting up Service Codes:

You need to add a new service codes, as follows:

| Code | Description        | Amount     |
|------|--------------------|------------|
| CFOP | CFOP Claim Combine | Leave      |
|      |                    | blank or 0 |

MedTech32:

Setup -> Accounting -> Services. "Add a new service".

Evolution:

File -> Accounting -> Service. "Add a new service"