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Reform.12

Desktop Filler

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About Desktop Filler

Reform Desktop Filler is a Windows application that allows users to manually complete forms. The forms have the ability to use database lookups, verify user input, and can be routed to email, fax, archive, or a printer. Other plug-ins such as Document Authority Control or TagDoc can also be applied to Desktop Filler workflows.

System Requirements

- Reform 12 Enterprise or Reform 12 PDC
- Desktop Filler Plug-in
- For Evaluation and Demonstration: Windows XP, Windows 2003 Server, Windows Vista, Windows 7 or Windows 2008 Server (64 Bit Operating Systems are Supported)
- For Production Systems: Windows 2003 Server or Windows 2008 Server (64 Bit Operating Systems are Supported)

All required Reform software downloads can be found at www.fabsoft.com >> Downloads section.

Hardware Requirements

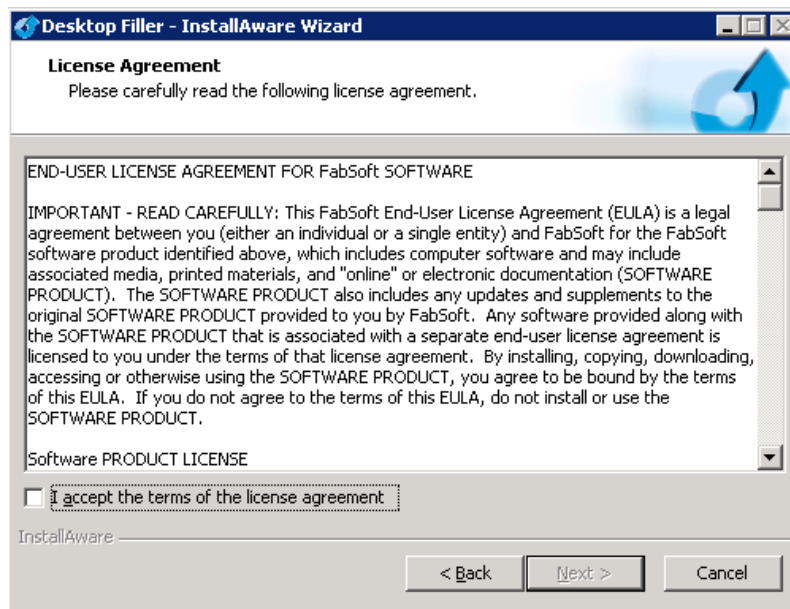
- Production System Recommendation (These suggestions are only estimations. High load environments may require multiple servers, or additional hardware.)
 1. Pentium 4 Processor
 2. 4 GB RAM
 3. HDD Space 100 GB (Redundancy recommended)
 4. Battery Backup (UPS)
 5. Dedicated server, no other software products except for virus and security programs.
- Minimum System Requirements for demonstration purposes only
 1. Pentium 4 Processor
 2. 2 GB RAM
 3. HDD Space 30 GB

Desktop Filler Installation

1. To install Desktop Filler, download and run the Desktop Filler installer.

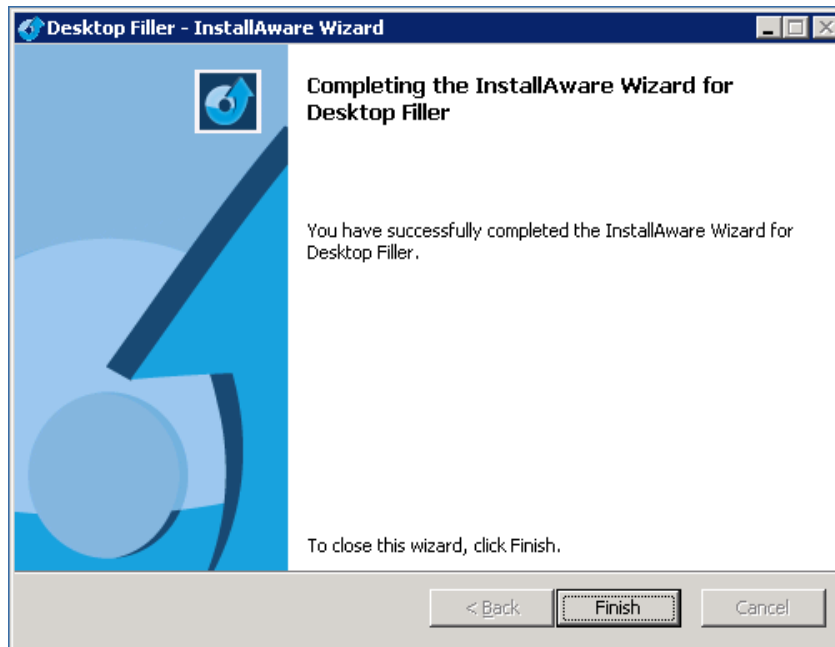


2. Step through the prompts and accept the User License Agreement. The installation will begin.



3. Allow the installation to complete and then read on to the next section to learn how to use the Desktop Filler. Click on Finish to exit out form the installation window.

The default installation directory for Reform 12 and its plugins is **C:\Program Files\Reform...**. If you have changed the path during the Reform installation routine, or if you are using a 64 bit operating system, please refer to the appropriate path instead of the default one referenced throughout this documentation.



Plugin Registration and Licensing

When evaluating Reform 12, the plugins will also be in an evaluation mode for that period of time. Once Reform has been purchased and licensed, the required plugins must also be licensed in order to continue functioning correctly.


Please see the "Reform 12 Licensing and Registration" section of the Reform 12 User Manual for more information on how to license Reform 12 Plug-ins. After the license is entered, the Reform Spooler will need to be restarted to refresh the licenses. More information regarding the Reform Spooler Service can be found in the Reform 12 User Manual.

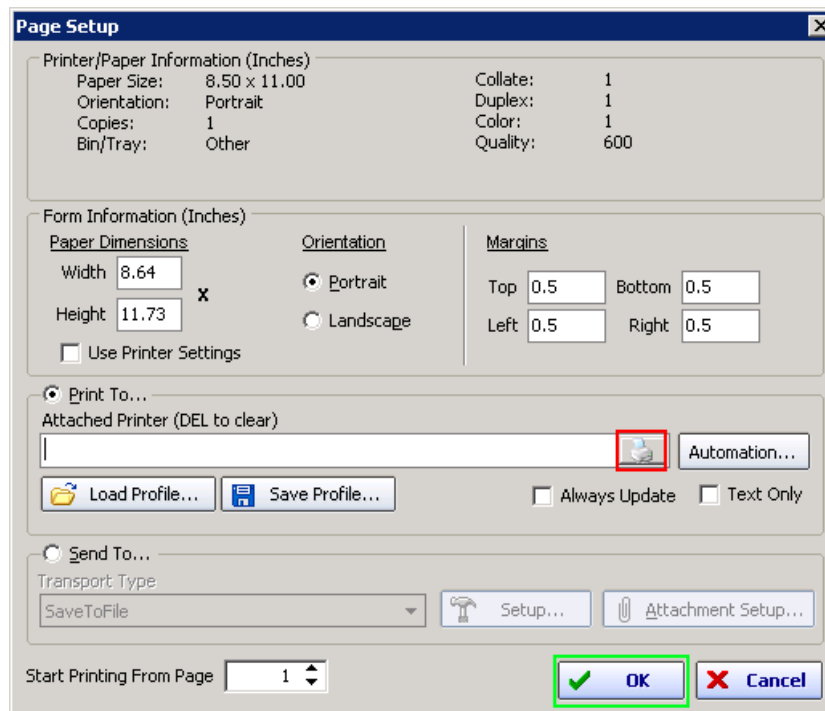
Setting up your Form using a template

1. First step, we need to create a form. Open the Reform Designer by going to **Start>Programs>Reform...>Designer**.
2. For this example, we will be creating a new form with an existing template. Go to **File>New>New**. Select the **Editable – Application_Page1-1** and click **OK**.



Editable - Application_Page1-1.ftm
Application

3. When it asks if you would like to open a text file for designing, select **No**.
4. Go to **File>Page Setup**. Select the printer that you want to use by clicking on the Printer Icon. . Click **OK**.

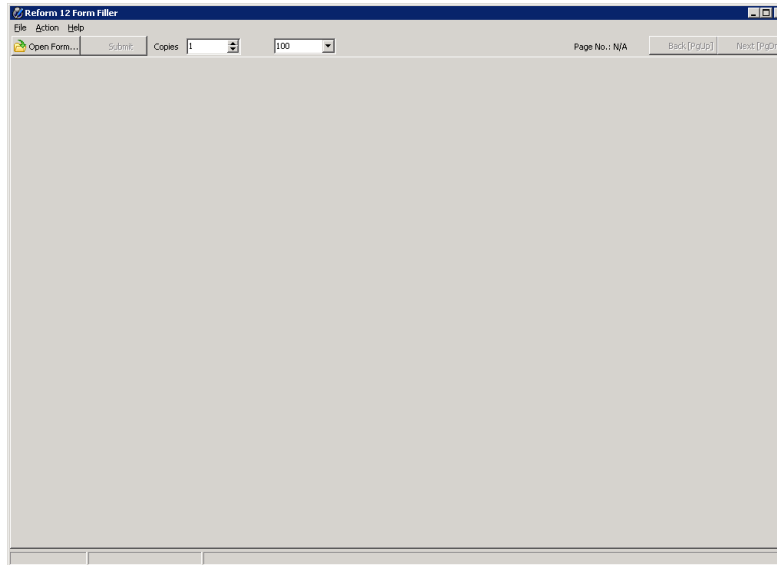


5. Go to **File>Save As** and name your form **Application**.

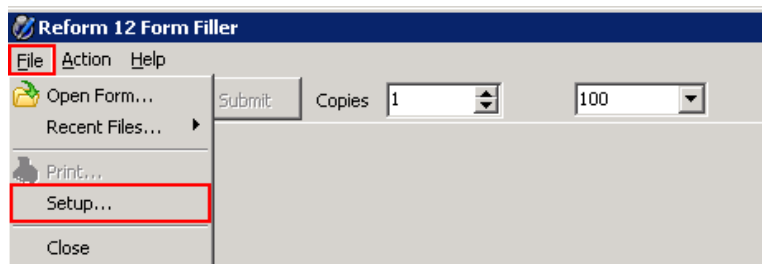
Now your Application form is ready to be used in the Desktop Filler.

Form Filler Tutorial

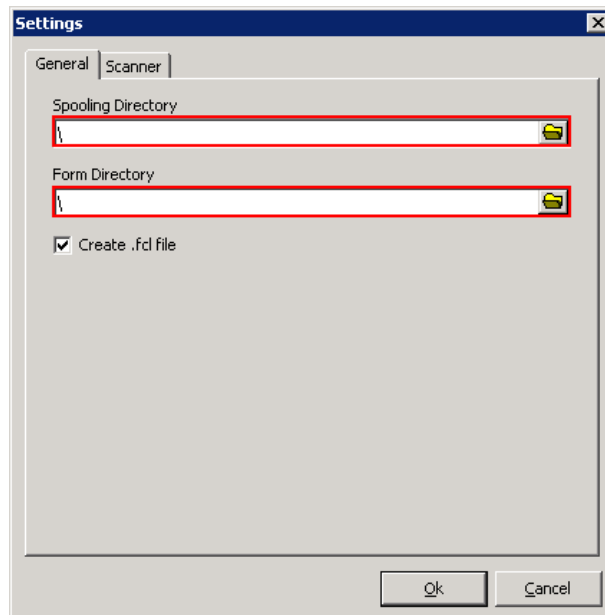
1. **Start>Programs>Reform...>Desktop Filler>Desktop Filler** to open the Desktop Filler Screen




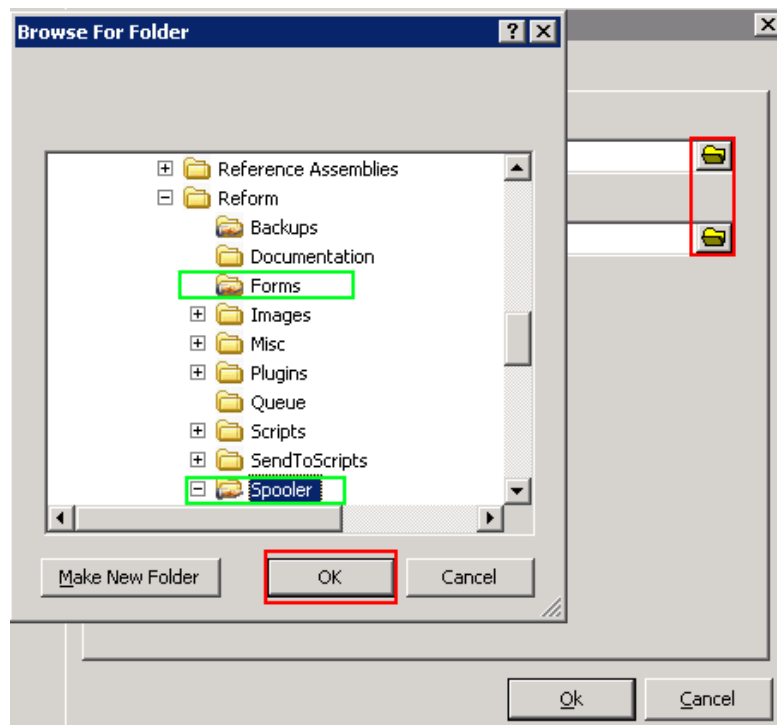
2. Go to **File>Setup**.



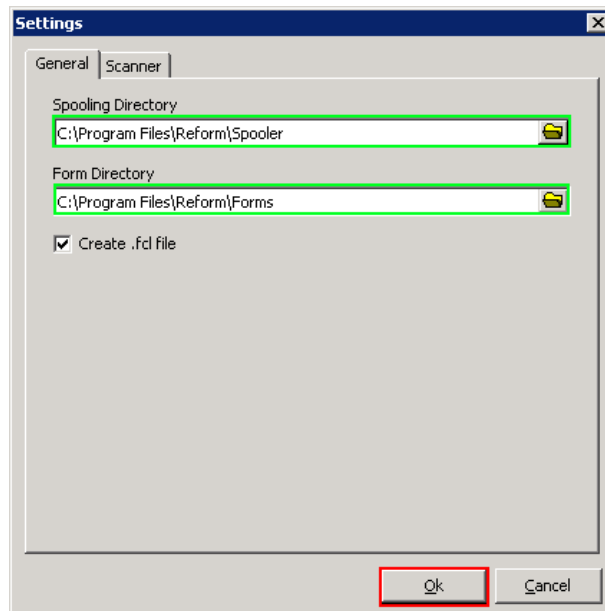
3. Here we need to enter the paths to the Spooler directory and the Form directory.



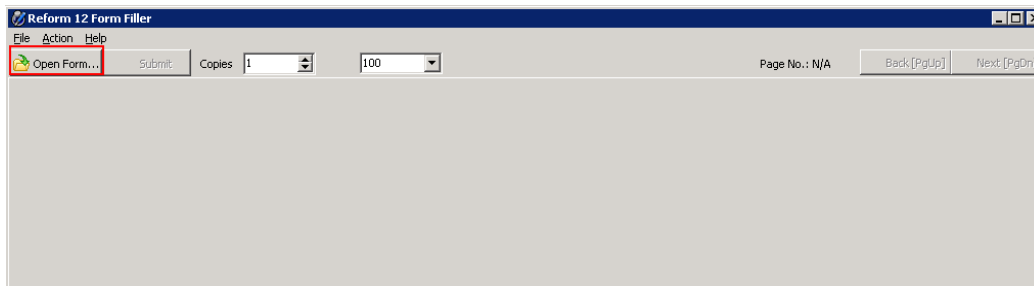
4. Use the browse buttons  to locate your spooler directory. Depending on your environment, these should be network paths to a Reform server (Especially when configuring Desktop Filler at a workstation). Browse or manually enter the directories for the Forms and Spooler (Ex: [\\ReformServer\Spooler](#) and [\\ReformServer\Forms](#))



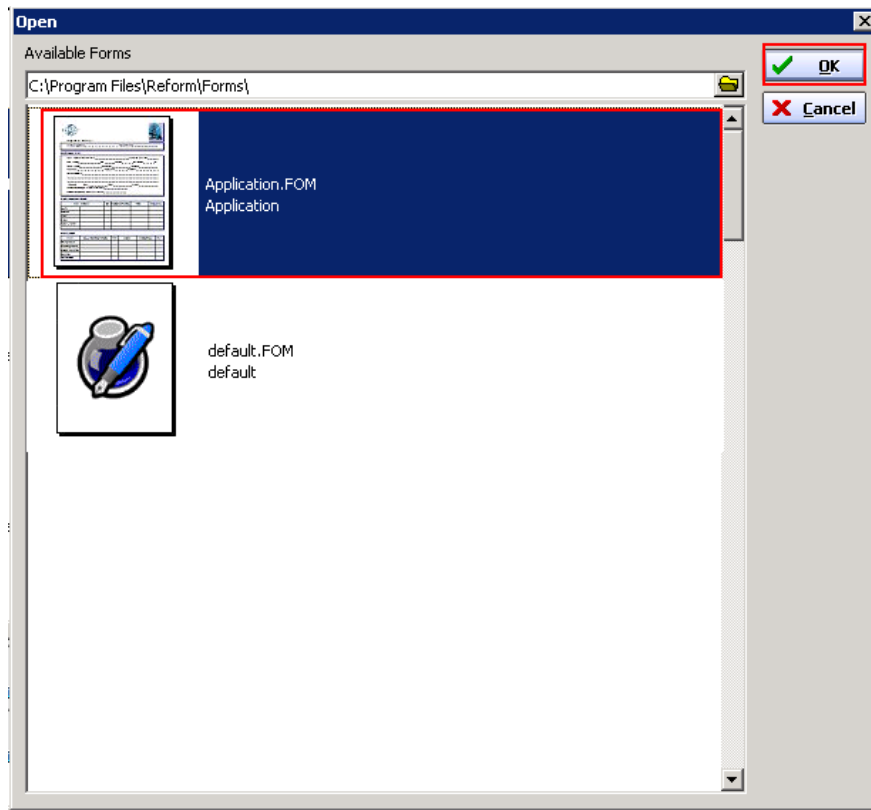
5. Verify that the paths are correct and click **OK**.



6. You are now taken back to the main Desktop Filler window.



7. Click on the **Open Form...** button and select **Application.FOM** from the list and click **OK**.



8. Fill out the form by selecting the fields and typing your information.

9. Click on **Submit** to print the document.

Reform 12 Form Filler

File Action Help

Open Form... Submit Copies 1 Page No.: 1 Back [PgUp] Next [PgDn]

Application

Image File no. _____

Position applied for Programmer Analyst Expected Salary 80,000

PERSONAL DATA

Name - Surname (Mr./Mrs./Ms.) John Smith Sex (Male or Female) Male

Date of Birth July 06 1958 Age 50 Weight 80 kg. Height _____ cm.

Place of Birth New Jersey City Nationality American Religion Catholic

ID Card No. _____ Expiry Date _____ Issued at _____

Present Address _____

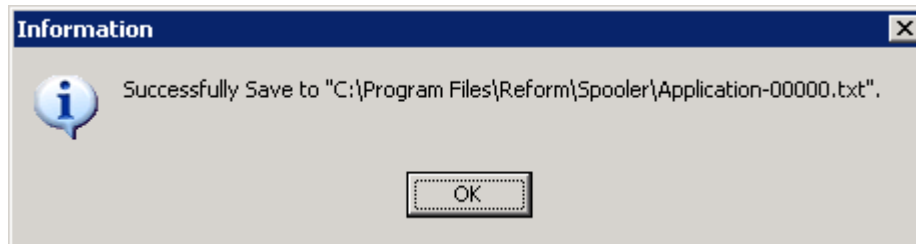
Telephone Home 201-789-9871 Office _____ Mobile _____

Marital Status (Single, Married or Divorced) Single

Military Service (Yes, No or Exempted..) No

Page No.: 1 APPLICATION.FOM Application

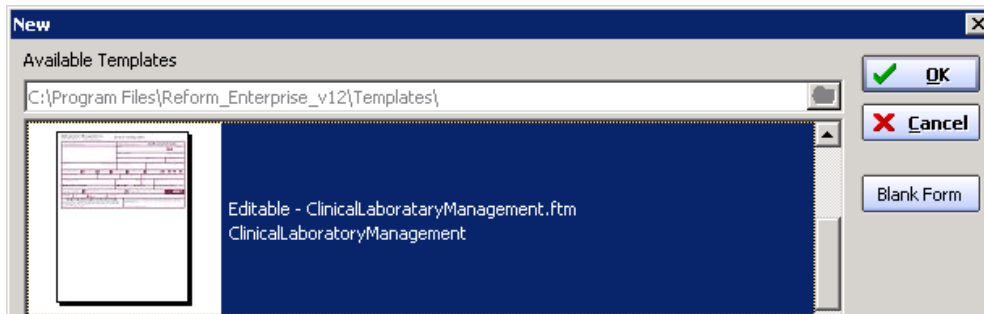
10. You will get a prompt that a text file has been saved in the Spooler directory. The Reform Spooler will match up the text file with the form that was saved. Ensure that the Reform Spooler is running on the Reform Server.



The document will be printed with the information you entered.

Modifying Form for Desktop Filler

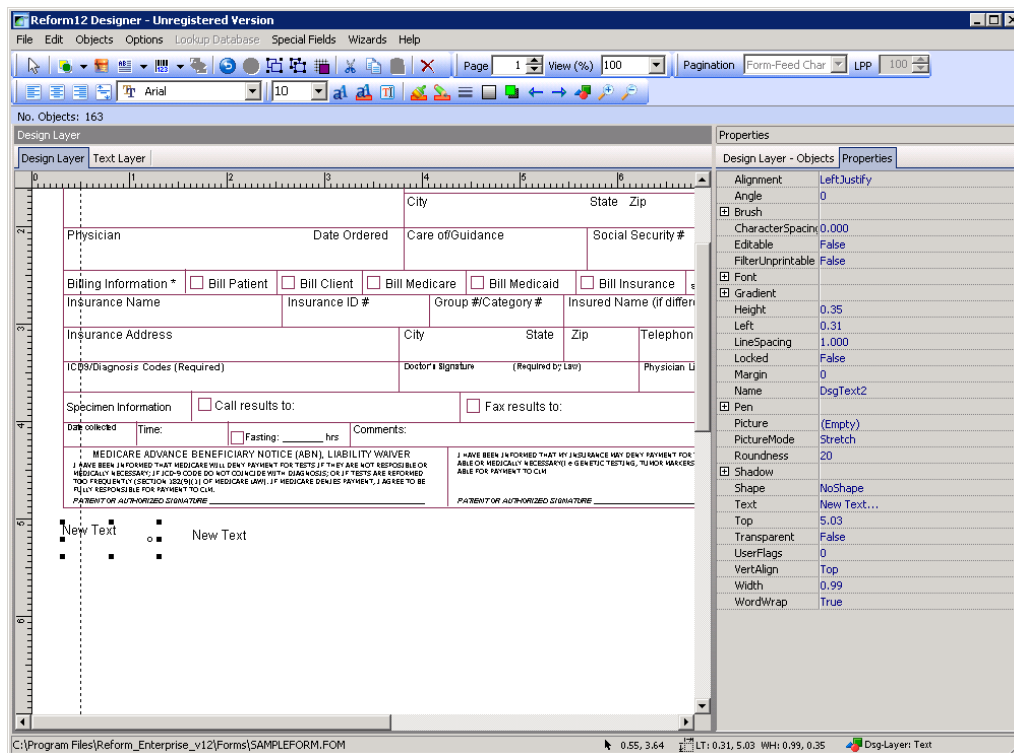
1. Open the Reform Designer by going to **Start > Programs > Reform...> Designer**.
2. Go to **File > New > New** > Select Editable-ClinicalLaboratoryManagement. You will be asked if you would like to open a text file. Select **No**.



3. Go to **File > Save As** . Type in **SAMPLEFORM.FOM**.
4. At the bottom portion you will be creating additional field for the Notes.

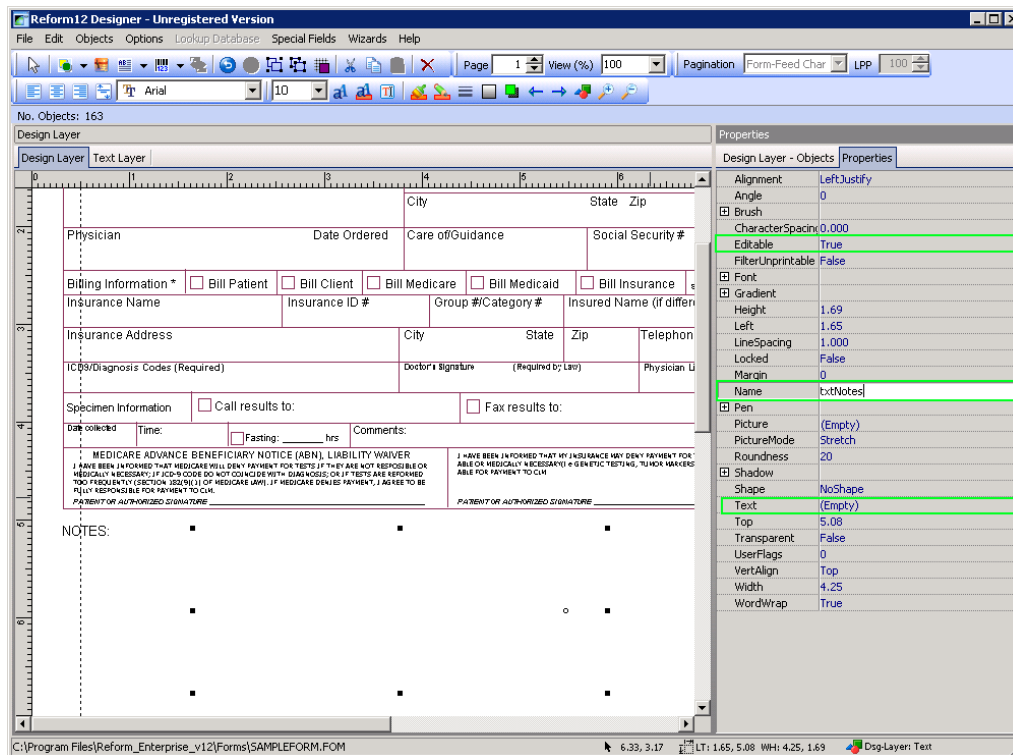


Click on the **Add Link Text** and draw 2 boxes in the form.



The first field will be for the label. Right click on this object and select “**Edit Text...**” Type in “**NOTES:**”. The second field will hold the value that the user enters from the Desktop Filler, so this box should be made larger. Select the second field and look at the properties. Make sure to change these properties as follows:

Editable =True
Name = txtNotes
Text =



- Now you’ve just finished modifying the form. Go to **File>Page Setup** and select a printer. When finished go to **File > Save**.
- Open up Desktop Filler and select SAMPLEFORM.FOM. You will see the Notes field is added on your form.

The screenshot shows a software window titled "Reform 12 Form Filler" with a menu bar (File, Action, Help) and a toolbar (Open Form..., Submit, Copies: 1). The main content area displays a "General Test Requisition" form for "ABC Laboratory Management". The form is divided into several sections:

- Account Information:** Fields for Name, Address (Street), City, State, Zip, and Telephone #.
- Patient Information or ADDRESSOGRAPH HERE:** Fields for Name (with M, F, D.O.B. options), Address (Street), Apt # Floor Room #, City, State, Zip, Telephone #, Physician, Date Ordered, Care of/Guidance, Social Security #, and Client Chart/Pt. ID #.
- Billing Information:** Checkboxes for Bill Patient, Bill Client, Bill Medicare, Bill Medicaid, and Bill Insurance. Fields for Insurance Name, Insurance ID #, Group #/Category #, and Insured Name (if different from patient).
- Insurance Address:** Fields for City, State, Zip, and Telephone #.
- TCDS/Diagnosis Codes (Required):** A field for entering codes.
- Doctor's Signature (Required by Law):** A field for the doctor's signature.
- Physician License # / URIN #:** A field for the physician's license number.
- Specimen Information:** Checkboxes for "Call results to:" and "Fax results to:". A prominent "STAT" button is located to the right of the "Fax results to:" checkbox. Below this are fields for "Date collected", "Time", "Fasting" (with a time unit), and "Comments".
- Legal Notices:** Two columns of text regarding Medicare Advance Beneficiary Notice (ABN) and liability waiver. The second column includes a "PAYMENT OF AUTHORIZED SIGNATURE" field.
- NOTES:** A large, empty rectangular box at the bottom of the form, highlighted with a green border.

The status bar at the bottom of the window shows "Page No.: 1", "SAMPLEFORM.FOM", and "ClinicalLaboratoryManagement".

7. Fill out the notes field and click on the **Submit** button to print the document.

Maintenance

There are certain directories that need to be monitored for growth along with the Desktop Filler plugin for Reform 12. As a system processes more and more jobs, the size of these directories can grow very quickly. Overall system performance can be affected by the large amounts of space that the files may take up. Obsolete files should be deleted according to your needs and file retention specifications. It is recommended to monitor the following directories for growth:

Directories:

C:\Program Files\Reform...\Backups

C:\Program Files\Reform...\Spooler\ImageQueue

Troubleshooting

- 1) **Forms are not displayed on Desktop Filler.** Go to **File> Setup** and make sure the Form Directory is set correctly. You also need to make sure the Spooler Directory is correct otherwise your form will not be processed.
- 2) **A field won't allow you to enter information.** Open the form from the Designer and check the properties of the field. Verify that the **Editable** property is set to **True** for the object's properties.