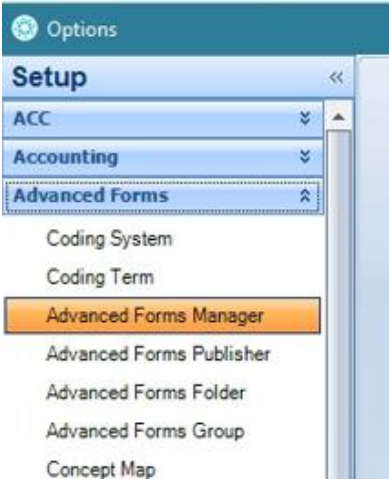
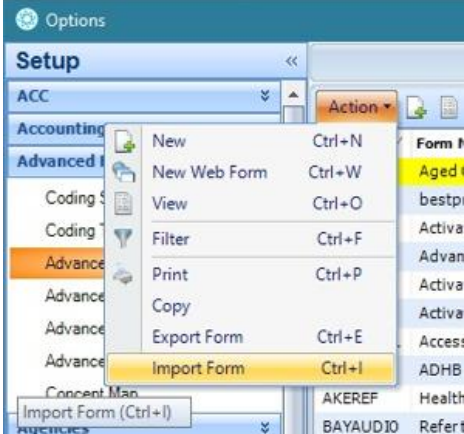
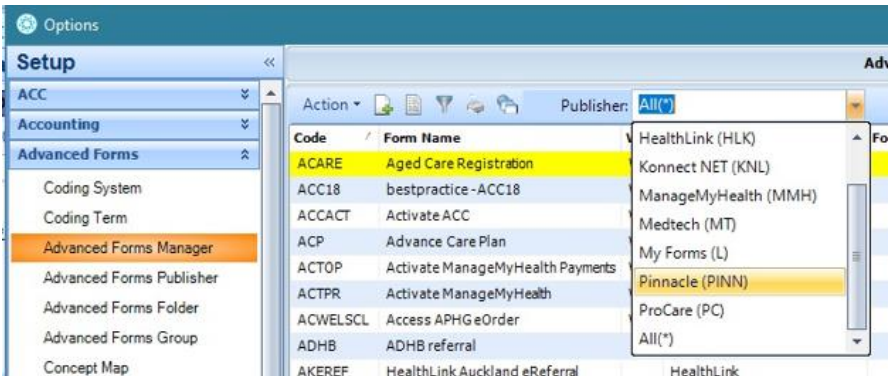


ONE POINT LESSON

Installing Advanced Form Medtech Evolution

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	
2. The Advanced Form window will open. Click: > Action > Import Form	
3. Click 'Browse' to locate the Advanced Form you have saved on your computer: > Open the {filename}.xml > Click Validate > Click Import	
4. Change Publisher to Pinnacle (PINN) If you cannot see the advanced form change Publisher to ALL.	

5. Select and open on the advanced form required in the list. For example, as highlighted - HPV Screening

Code	Form Name	Web	Publisher	Folder	Group
CXHP	CX - High Priority and Overdue		Pinnacle		
HPVS	HPV Screening PINN		Pinnacle		
HW	Healthy Weight		Pinnacle		
IR	Incident Recording Form		Pinnacle		
PAL	Palliative Care		Pinnacle	Funded Projects	

6. Click the 'Actions' tab.

Tick the box:

'Send the HealthLink Folder.'

If you already have Adv. Forms "published" under Pinnacle, you could copy the HLINK folder destination from another advanced form.

*But if you don't, you will need to locate the destination of your HealthLink folder
.....:\HLINK\FF_out\pinnacle).*

Tick the box:

'Create invoice to Account'

Then select an existing A/C or create a new A/C holder for invoicing.

Click OK.

[Adv. Form Name]

Main **Actions** Fields Field Rules Form Rules User Settings Audit

User Message:

Summary Merge Text: Send To: None

Arial 10 B I U A

☒ Send to Healthlink Folder:

Export Format: Full Details (Name+Address+Nhi)

☒ Create Invoice to Account:

Inactive: ☐ OK Cancel Help