

How to create a custom clinical workflow profile

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DrChrono has created the ability for users to create a custom clinical workflow profile.

Creating Custom Fields for Clinical Workflow Profiles

- Navigate to Account
- Account Settings
- Custom Fields
- Custom Workflow Profiles
- + New Profile

The Action columns allow the user to edit or archive the profile.

The screenshot shows the 'Clinical Workflow Profiles' management page. At the top, there is a navigation bar with 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. A search bar and utility icons are on the right. A left sidebar lists various settings categories, with 'Clinical Workflow Profiles' highlighted. The main content area is titled 'Clinical Workflow Profiles' and includes a brief description: 'Clinical workflow profiles are groups of clinical forms that you can choose to start your clinical note progress, blablalbla.' Below this, there are two sections: 'Active Profiles' and 'Inactive Profiles'. Each section contains a table with columns for Name, Description, Form Usage, Creator, Date Updated, Date Created, and Action. The 'Active Profiles' table has three rows for 'New Patient Visit', 'Follow-up Visit', and 'General Surgery', each with a '5 forms', '6 forms', and '7 forms' usage respectively. The 'Inactive Profiles' table has three rows with the same names and descriptions, but the 'Action' column contains a 'Unarchive' link for each.

Name	Description	Form Usage	Creator	Date Updated	Date Created	Action
New Patient Visit	A set of forms for new patient visit.	5 forms	Alice Bruce	03/21/2023	03/21/2023	Edit Archive
Follow-up Visit	A set of forms for follow-up patient visit.	6 forms	Alice Bruce	03/21/2023	03/21/2023	Edit Archive
General Surgery	A set of forms for general surgery.	7 forms	Alice Bruce	03/21/2023	03/21/2023	Edit Archive

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New Patient Visit	A set of forms for new patient visit.	5 forms	Alice Bruce	03/21/2023	03/21/2023	Unarchive
Follow-up Visit	A set of forms for follow-up patient visit.	6 forms	Alice Bruce	03/21/2023	03/21/2023	Unarchive
General Surgery	A set of forms for general surgery.	7 forms	Alice Bruce	03/21/2023	03/21/2023	Unarchive

Once the pop-up window appears

- Name the profile
- Description (ie: New Patient Visit)
- Add Form - applicable forms that should be associated
- Create

Create Clinical Workflow Profile



Name

Description

Attached Clinical Forms

No forms have been attached to this workflow profile.

[Add Form](#)

Cancel

Create