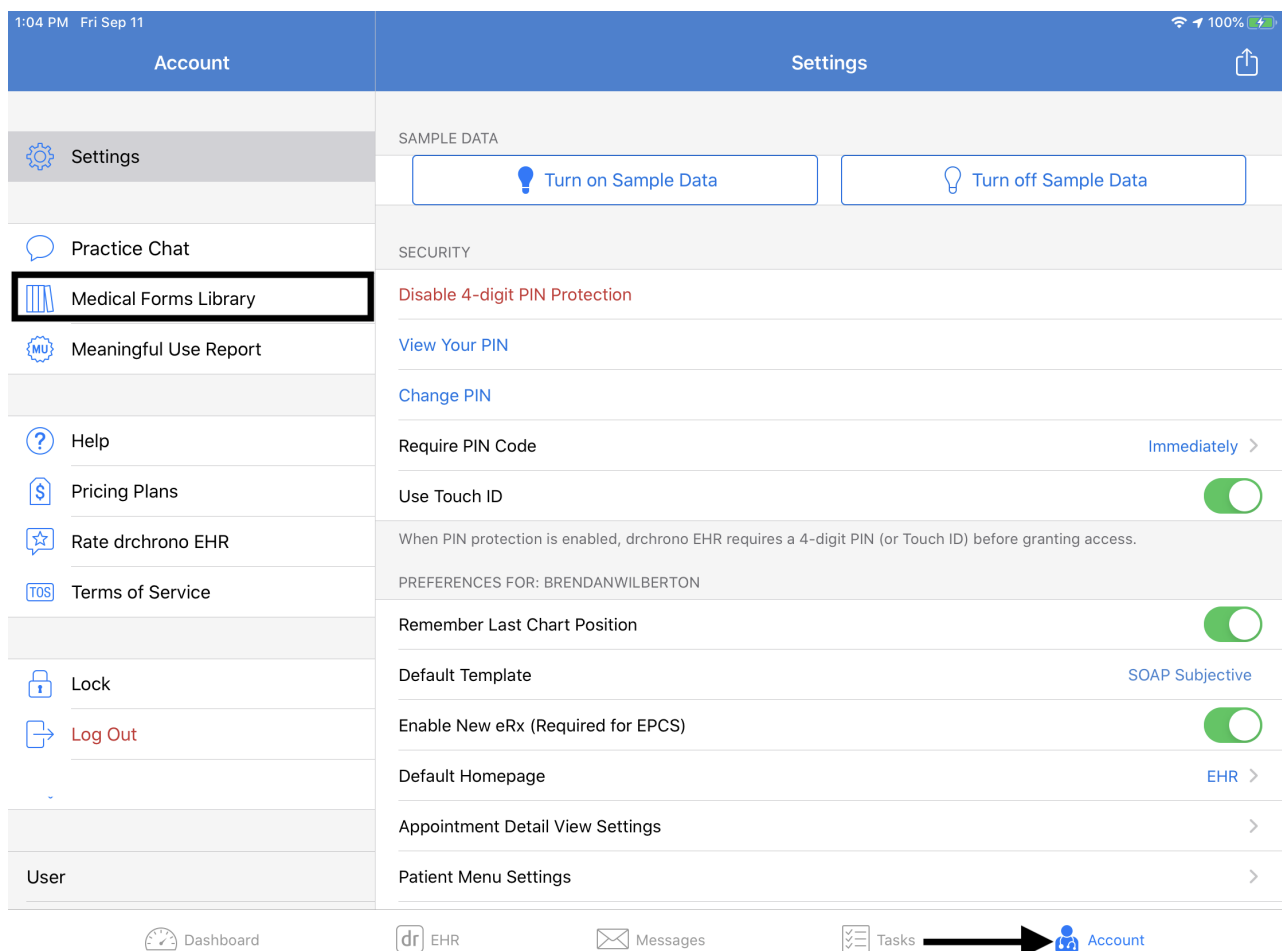


Adding Forms from the Form Library on the iPad App

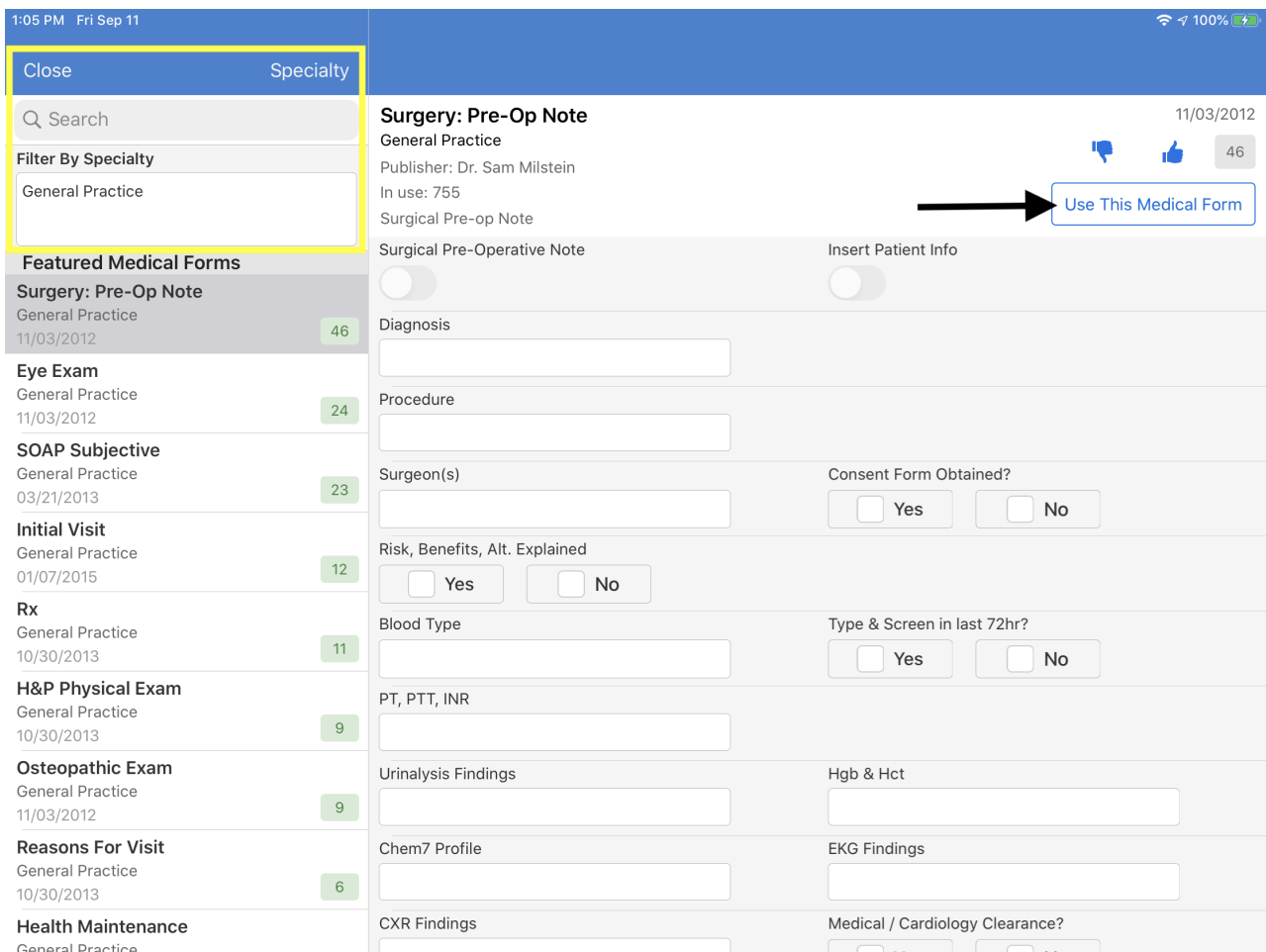
07/08/2024 7:32 pm EDT

Using pre-built forms is a great way to save time when creating your own templates and is also a great way to see what kind of templates work for other providers. In the [EHR app](#), you may use a variety of community-sourced templates that other providers have submitted.

1. To get started, tap on **Account** in your navigation bar then select **Medical Forms Library** your left-hand navigation pane.

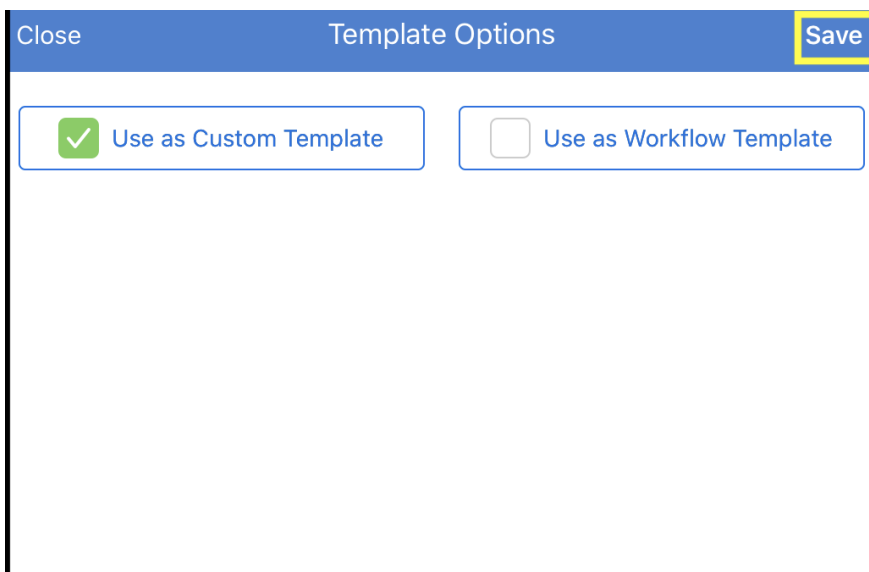


2. Once you're in the **Form Library**, you can search for templates with the **keywords** you specify or search by **specialty**. When you've found a template you would like to use, select **Use This Medical Form**.



3. After tapping **Use This Medical Form**, you will be given two options: **Use as Custom Form** or **Use as Workflow Template**.

- When you select the **Use as Custom Template** option and **Save**, the form will be moved to your account and can be found under the **Additional** tab



- When you select the **Use as Workflow Template** option, you must select one of the preset forms that you would like to replace with the form you have selected from the library.
- Setting a form as a workflow allows you to replace the content under the Preset forms with a different form.
- Select the form you would like to replace and tap **Save**.

Close

Template Options

Save



Use as Custom Template



Use as Workflow Template

Select Workflow Step



H&P CC / History of Present Illness



H&P Family & Social History



H&P Review of Systems



H&P Physical Exam



H&P Assessment



H&P Plan



H&P Medications & Allergies



SOAP Subjective



SOAP Objective



SOAP Assessment

4. Once the form is copied, tap **OK**.

Close

Template Options

Save



Use as Custom Template



Use as Workflow Template

Template Copied

This template has been added to your custom template list.

Ok

Close

Template Options

Save



Use as Custom Template



Use as Workflow Template

H&P Family & Social History

Template Copied

This template is now your 'H&P Family & Social History' workflow template. Your old template has been archived.

Ok