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.

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Account	Settings	ſ.	
🔅 Settings	SAMPLE DATA	f Sample Data	
Practice Chat	SECURITY		
Medical Forms Library	Disable 4-digit PIN Protection		
Meaningful Use Report	View Your PIN		
	Change PIN		
? Help	Require PIN Code	Immediately	
S Pricing Plans	Use Touch ID		
Rate drchrono EHR	When PIN protection is enabled, drchrono EHR requires a 4-digit PIN (or Touch ID) before granting access.		
Terms of Service	PREFERENCES FOR: BRENDANWILBERTON		
	Remember Last Chart Position		
Lock	Default Template	SOAP Subjective	
Log Out	Enable New eRx (Required for EPCS)		
•	Default Homepage	EHR	
	Appointment Detail View Settings	2	
Jser	Patient Menu Settings	2	
Dashboard	dr EHR Messages	Account	

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**.

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Close	Specialty		
Q Search Filter By Specialty General Practice Featured Medical Forms		Surgery: Pre-Op Note General Practice Publisher: Dr. Sam Milstein In use: 755 Surgical Pre-op Note Surgical Pre-Operative Note	11/03/2012 Image: Second Seco
Surgery: Pre-Op Note General Practice 11/03/2012	46	Diagnosis	
Eye Exam General Practice 11/03/2012	24	Procedure	
SOAP Subjective General Practice 03/21/2013	23	Surgeon(s)	Consent Form Obtained?
Initial Visit General Practice 01/07/2015	12	Risk, Benefits, Alt. Explained	
Rx General Practice 10/30/2013	11	Blood Type	Type & Screen in last 72hr?
H&P Physical Exam General Practice 10/30/2013	9	PT, PTT, INR	
Osteopathic Exam General Practice 11/03/2012	9	Urinalysis Findings	Hgb & Hct
Reasons For Visit General Practice 10/30/2013	6	Chem7 Profile	EKG Findings
Health Maintenance General Practice		CXR Findings	Medical / Cardiology Clearance?

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

Close	Template Options	Save
	Use as Custom Template	

- 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**.



