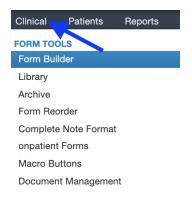
Sharing Templates with Other DrChrono Users

07/08/2024 7:38 pm EDT

Templates/Forms can be shared with other DrChrono users outside of your practice group, other providers, and colleagues.

1. To share a template, go to Clinical > Form Builder



2. Select the form you would like to share. After choosing the form to share, there will be a menu of sharing options below the form.

| Clinical Patients Reports | Billing Accour | it Help 🛊 🗙 | | | Search | |
|--|----------------|--|--|----------------|--------------------------|---------------|
| Form Builder | | | | Legend: 🖋 Edit | Move Scopy to clipbo | ard 🗙 Archive |
| Form List | + | Trigger Poi | nt Injection Form 🖋 | | Form Tools | |
| Presets Additional | | Muscle Group | Right, Left, or Bilateral | | New Fields Field Clipboa | rd 25 |
| Plan | × | Multiple Select | Single Select • | _ | New Section SOA | P Section |
| Surgery: Pre-Op Note Trigger Point Injection Form | × | Patient set of trigger point injections Single Select | Position Single Select | | Short Text Field | |
| To be filled out by Physician/Staff | × | Risks of Procedure | Potential Benefits Multiple Select | | Yes / No | YN |
| CERVICAL SPINE ASSESSMENT | × | | | | Switch | ON |
| Lumbar Facet Joint Injections | × | Time out taken, verified injection site | Preparation of the area Multiple Select | | Single Select | \checkmark |
| Consent Practice Demo | × | Needle size | Medication injected | | Multiple Select | \checkmark |
| Consent Free Draw 2 | × | Single Select • ¢ | Single Select • | | Free Draw | Mm |
| Consent for Injection | × | Additional Comments | | | Fraction Field | |
| Physical Exam Multiple Select | × | | | | Header | |
| Share | | | | | Subheader | |
| Library Email f Facebook y | Twitter | Options 🔺 | Save as | Save | Reference Field | • -> |
| | | | | | | |

3. You can share the selected template with the **Form Library** by clicking on **Library**. You will be prompted to enter any notes about the template if you would like. Once you are ready click **Share to Library**.

| Share | to | Library |
|-------|----|---------|
|-------|----|---------|

| Name for library copy | Trigger Point Injection Form |] | |
|-----------------------|------------------------------|---|------------------|
| Public notes | | | |
| | | C | Share to Library |

You can also share your selected form via email by clicking on the **Email** under the share menu. Enter the email address of the recipient. You also have the option to **Restrict editing** and **Restrict sharing**, if you would like, by checking the boxes; however, it is not required. Once you are ready, click **Share to Email**.

Share to Email

| Email recipient | sales@drchrono.com |
|------------------|--|
| Restrict editing | If checked, the recipient will not be able to edit this form. |
| Restrict sharing | If checked, the recipient will not be able to reshare this form. |
| | Share to Email |

They will be sent an email with a link that will prompt them to copy the template.

| dr chrono | | | | | |
|--|--|--|--|--|--|
| Dr. James Smith has shared a medical form with you! Click here to copy this form into your own DrChrono account. Take a look at our <u>medical form library</u> to find other forms that might work for you as well. Don't have an account yet? Easily create an account by <u>clicking here</u> . | | | | | |
| DrChrono develops the essential platform and services for modern medical practices to make care more informed, more interactive, and more personalized. | | | | | |
| (†) 🖤 🛅 (in) | | | | | |

Once the link is clicked, a new tab will open that prompts the recipient to bring the form into their account. Clicking **Accept** will add the form to their account.

would like to share the form "SOAP Plan" with you.

Accept

The recipient will receive a message that the form has been added to their account.

| The form has been copied to your form list. You can now freely use and | × | Billing | Account | Help | \$ | × | | |
|--|---|---------|---|----------|----|---|--|--|
| edit it! | | | Form Builder | | | | | |
| | | Form | Form List | | | | | |
| | | Prese | ts Additi | onal | | | | |
| | | Plan | Plan | | | | | |
| | | | SOAP Plan (Replaced at 07-13-2020 14:32:20) | | | | | |
| | | Surger | Surgery: Pre-Op Note | | | | | |
| | | Trigger | Point Inject | ion Form | | | | |

4. You can also share templates via **Facebook** or **Twitter**. You will be taken to the respective pages after clicking the buttons.