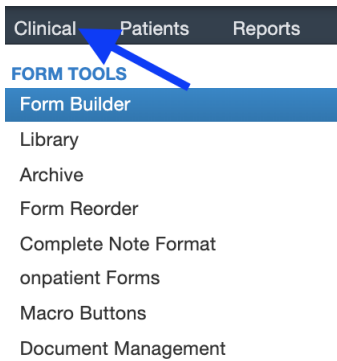


Sharing Templates with Other DrChrono Users

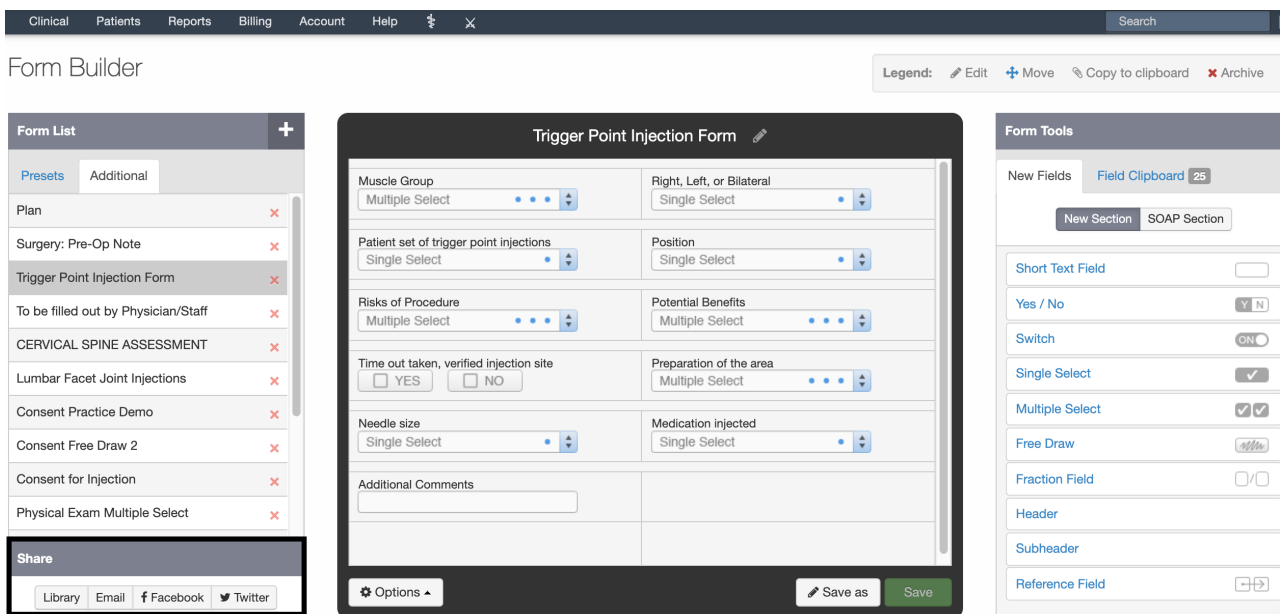
07/08/2024 7:38 pm EDT

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.



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

Public notes



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

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.



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



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 [medical form library](#) to find other forms that might work for you as well.

Don't have an account yet? Easily create an account by [clicking here](#).

DrChrono develops the essential platform and services for modern medical practices to make care more informed, more interactive, and more personalized.



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 edit it!

Reports Billing Account Help

Form Builder

Form List	
Presets	Additional
Plan	
SOAP Plan (Replaced at 07-13-2020 14:32:20)	
Surgery: Pre-Op Note	
Trigger Point Injection Form	

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