How to create a custom clinical workflow profile

07/24/2024 5:10 pm EDT

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.

chedule Clinical Patients	s Reports Billing A	Account Help				Search	⊠ ≡ +	
Appointment Fields	Clinical Wor	kflow Profile	es					
Appointment Profiles	Clinical workflow profiles are groups of clinical forms that you can choose to start your clinical note progress, blablablabla.							
Appointment Statuses	Active Profiles							
Appointment Templates	Active Profiles + New Profile							
Clinical Workflow Profiles	Name	Description	Form Usage	Creator	Date Updated	Date Created	Action	
Billing Profiles	New Patient V	/isit A set of forms new patient vis	5 forms	Alice Bruce	03/21/2023	03/21/2023	/	
Billing Statuses		A set of forms			02/24/2022	00/04/00000		
Patient Demographics	Follow-up Visi	t follow-up patie visit.	ent 6 forms	Alice Bruce	03/21/2023	03/21/2023	/	
Patient Flag Types	General Surge	A set of forms general surger	7 forms	Alice Bruce	03/21/2023	03/21/2023	/	
Patient Payment Types								
Procedures								
Procedure Categories	Inactive Profiles							
Vital Flowsheets	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	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