Sharing Templates with Other DrChrono Users

07/24/2024 9:16 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 Accou	unt Help 🛊 🗙			Search	
Form Builder				Legend: 🖋 Edi	t 💠 Move 🚿 Copy to clipboar	d 🗙 Archive
Form List	+	Trigger Po	int Injection Form 🖉		Form Tools	
Presets Additional		Muscle Group	Right, Left, or Bilateral		New Fields Field Clipboard	25
Plan	×	Multiple Select	Single Select • 🗘		New Section SOAP	Section
Surgery: Pre-Op Note	×	Patient set of trigger point injections Single Select	Position Single Select		Short Text Field	
Trigger Point Injection Form	×					
To be filled out by Physician/Staff	×	Risks of Procedure	Potential Benefits		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	 ✓
Consent Practice Demo	×	Needle size	Medication injected		Multiple Select	
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
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Name for library copy	Trigger Point Injection Form	
Public notes		
		Cane 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.					
(f) (m) (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!		Forr	Form Builder					
		Form	Form List					
		Prese	ts Additi	onal				
		Plan	Plan					
		SOAP 14:32:	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.