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 I	Billing Accour	nt Help 🛊 🗙			Search	
Form Builder				Legend: Sedit	🕂 Move 🛛 🗞 Copy to clipbo	oard 🗙 Archive
Form List	+	Trigger Poir	nt Injection Form 🖋		Form Tools	
Presets Additional		Muscle Group	Right, Left, or Bilateral		New Fields Field Clipbo	ard 25
Plan	×	Patient set of trigger point injections	Position	_	New Section SO/	AP Section
Surgery: Pre-Op Note Trigger Point Injection Form	×	Single Select	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	 ✓
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 9 T	Switter	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	\$	V		
edit it!			Billing Account Help & X					
		Form List						
		Prese	ts Additi	onal				
		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.