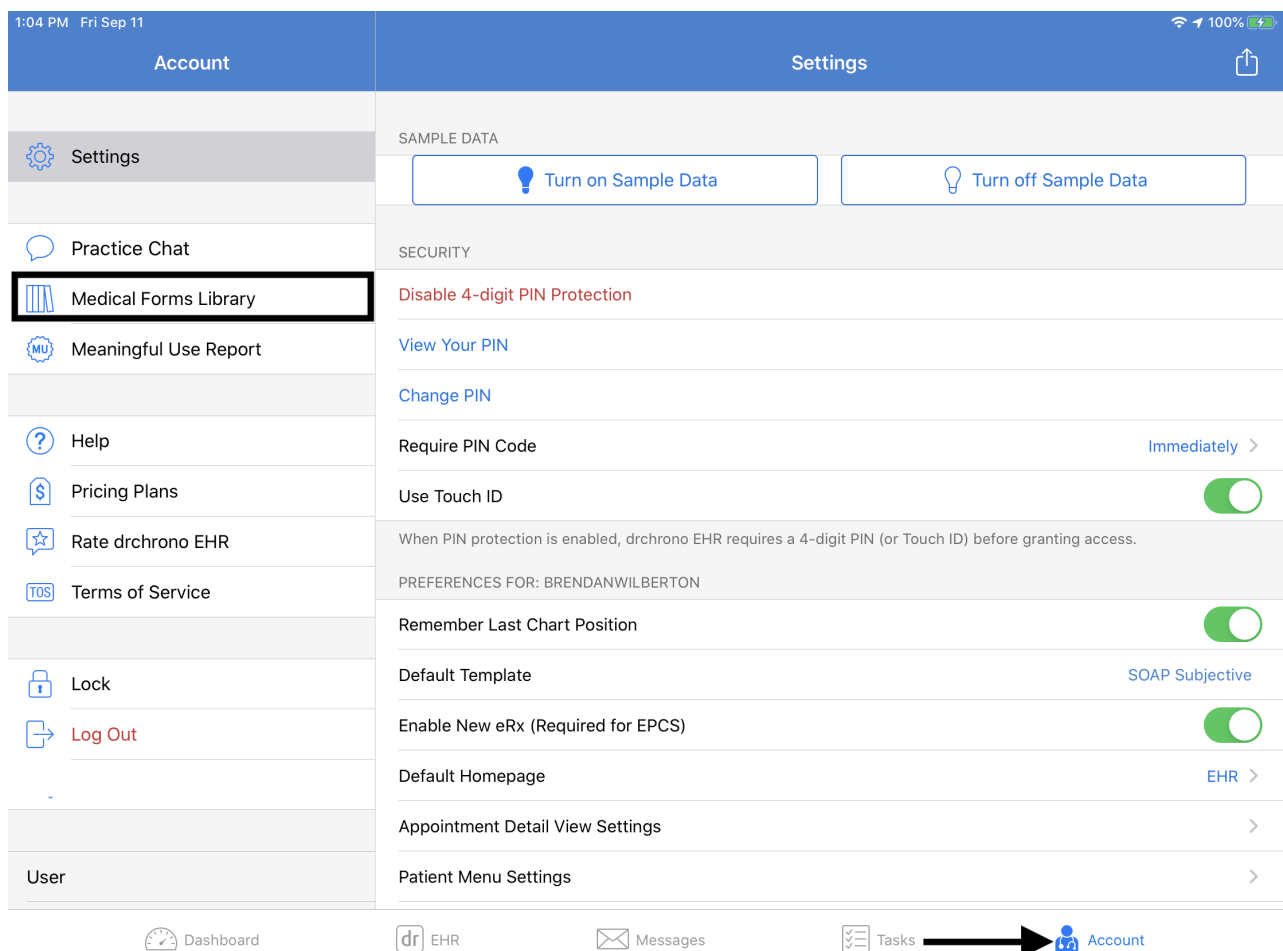


Adding Forms from the Form Library on the iPad App

07/24/2024 12:04 pm EDT

Using pre-built forms is a great way to save time when creating your own templates and is also a great way to see what kind of templates work for other providers. In the [EHR app](#), you may use a variety of community-sourced templates that other providers have submitted.

1. To get started, tap on **Account** in your navigation bar then select **Medical Forms Library** your left-hand navigation pane.



2. Once you're in the **Form Library**, you can search for templates with the **keywords** you specify or search by **specialty**. When you've found a template you would like to use, select **Use This Medical Form**.

1:05 PM Fri Sep 11

Close Specialty

Q Search

Filter By Specialty

General Practice

Featured Medical Forms

Surgery: Pre-Op Note
General Practice
11/03/2012 46

Eye Exam
General Practice
11/03/2012 24

SOAP Subjective
General Practice
03/21/2013 23

Initial Visit
General Practice
01/07/2015 12

Rx
General Practice
10/30/2013 11

H&P Physical Exam
General Practice
10/30/2013 9

Osteopathic Exam
General Practice
11/03/2012 9

Reasons For Visit
General Practice
10/30/2013 6

Health Maintenance
General Practice

Surgery: Pre-Op Note
General Practice
Publisher: Dr. Sam Milstein
In use: 755
Surgical Pre-op Note

11/03/2012 46

Use This Medical Form

Surgical Pre-Operative Note

Insert Patient Info

Diagnosis

Procedure

Surgeon(s)

Consent Form Obtained?
 Yes No

Risk, Benefits, Alt. Explained
 Yes No

Blood Type

Type & Screen in last 72hr?
 Yes No

PT, PTT, INR

Urinalysis Findings

Hgb & Hct

Chem7 Profile

EKG Findings

CXR Findings

Medical / Cardiology Clearance?

3. After tapping **Use This Medical Form**, you will be given two options: **Use as Custom Form** or **Use as Workflow Template**.

- When you select the **Use as Custom Template** option and **Save**, the form will be moved to your account and can be found under the **Additional** tab

Close Template Options Save

Use as Custom Template

Use as Workflow Template

- When you select the **Use as Workflow Template** option, you must select one of the preset forms that you would like to replace with the form you have selected from the library.
- Setting a form as a workflow allows you to replace the content under the Preset forms with a different form.
- Select the form you would like to replace and tap **Save**.

Close

Template Options

Save



Use as Custom Template



Use as Workflow Template

Select Workflow Step



H&P CC / History of Present Illness



H&P Family & Social History



H&P Review of Systems



H&P Physical Exam



H&P Assessment



H&P Plan



H&P Medications & Allergies



SOAP Subjective



SOAP Objective



SOAP Assessment

4. Once the form is copied, tap **OK**.

Close

Template Options

Save



Use as Custom Template



Use as Workflow Template

Template Copied

This template has been added to your custom template list.

Ok

Close

Template Options

Save



Use as Custom Template



Use as Workflow Template

H&P Family & Social History

Template Copied

This template is now your 'H&P Family & Social History' workflow template. Your old template has been archived.

Ok