
This Quick Reference Guide (QRG) demonstrates how to navigate the Clinical Entry Workspace.

Use the Clinical Entry Workspace

➤ From any Workflow MPage:

STEP 1: Click the **Toggle Workspace** icon to open and view the workspace.



STEP 2: Click the **Workspace Settings** icon to change the width or size of the workspace, or to hide it completely.



Customize the Workspace

STEP 1: Click **Settings**

STEP 2: Change the Order and Documentation Settings as desired.

NOTE: In the **Documentation Component Settings** section, the drag-and-drop functionality allows components to be moved to a new position.

STEP 3: Click **Apply**.

Adding a New PowerForm

STEP 1: Click **Add Form**

STEP 2: In the **Add Form** window, click the **Search** field.

STEP 3: Type the search term for the desired PowerForm; then, select the matching checkbox.

NOTE: Click the appropriate **Favorites Icon** to add the PowerForm to a Favorites list.



STEP 4: Click **Add**.

STEP 5: Complete and Sign the PowerForm that displays.

NOTE: A new PowerForm can also be added from the History Tab in the Add Form window. The History tab enables the selection of any PowerForm template that has been added in the past.

View Or Modify a PowerForm

➤ From the Workspace:

STEP 1: Click the **View** icon to view any PowerForm from the workspace.



STEP 2: Click **Modify** to modify any PowerForm in the workspace.

Change the Charting Filters

➤ From the Charting component:

STEP 1: Click the **View Forms** dropdown arrow to change the number of forms displayed.

STEP 2: Click **Filter** to select a different filtering option.

Use the Form Browser

➤ From the Charting Component:

STEP 1: Click **Form Browser** to filter a patient's documented PowerForms.

STEP 2: In the Charted Forms window, click the **Range**, **Status** and/or **Author** dropdown arrows to adjust the filters according to specific needs or click **Filters** to reset to default filter settings.

NOTE: A view-only version of a form can be reviewed by clicking View next to the PowerForm name. To modify or unchart a form: ▪ Click the PowerForm name ▪ Click Modify or Unchart
