From the Office of Health Informatics

Quick Reference Guide (QRG)
Manage PowerForms

April 2, 2020

This Quick Reference Guide (QRG) demonstrates managing, documenting, and modifying PowerForms.

Common Buttons & Icons

AdHoc	Ad Hoc button
Chart	Chart button

✓	Sign icon
CareCompass	CareCompass button

Document a New Tasked-Based PowerForm

- **Once a PowerForm launches from an MPage or CareCompass:**

STEP 1: Begin documentation by clicking the needed section from the side menu.

NOTE: **Any section with a red asterisk has required documentation and pay particular attention to blue and red colored text when completing a PowerForm.**

STEP 2: Click a field to type in text as needed.

STEP 3: Select available checkboxes to multiple items within a given section.

STEP 4: Click a radio button for single-select options.

STEP 5: Click a header to document all items in a column at one time.

STEP 6: Click an individual cell to document on a grid for individual documentation.

STEP 7: Click the **Sign** icon to confirm all documentation to the patient's chart.

Document Ad Hoc PowerForms

- **From the patient's chart:**

STEP 1: Click **AdHoc** in the top toolbar.

STEP 2: Click the appropriate folder to open the PowerForms for that subject.

STEP 3: Select the desired Ad Hoc forms to document.

NOTE: **Select as many as needed. They will open one right after the other for documentation.**

STEP 4: Click **Chart**.

STEP 5: Click the appropriate sections for documentation.

NOTE: **A red asterisk means documentation is required.**

STEP 6: Click a field to type in text as needed.

STEP 7: Select available checkboxes to multiple items within a given section.

STEP 8: Click a radio button for single-select options.

STEP 9: Click a header to document all items in a column at one time.

STEP 10: Click an individual cell to document on a grid for individual documentation.

STEP 11: Click the Sign icon to confirm all documentation to the patient's chart.

STEP 12: Scroll down the form to review and document all pertinent information.

STEP 13: Click the next section to document from the left-side menu until all sections are completed.

STEP 14: Click the **Sign** icon to confirm documentation to the patient's chart.

Modify a PowerForm

- **From within the patient's chart:**

STEP 1: Click **Form Browser** from the left-side menu.

STEP 2: Click the Sort by dropdown arrow as needed to filter the displayed list.

- View – opens the form in view-only format; this is the same as double-clicking the form.
- Modify – modify previously documented information in the PowerForm.
- Unchart – removes the entire PowerForm from the patient's chart.
- Print – print the PowerForm.
- History – view any historical change information if the form has been modified.
- Change date and time – change the documented date and time of the PowerForm.

STEP 3: Select the desired way to filter the list.

STEP 4: Click the **+** next to a listed folder top open the folder if the folder is not defaulted open.

STEP 5: Right-click the appropriate form.

NOTE: A form is noted as signed when it says (Auth (Verified)).

STEP 6: Click **Modify**.

STEP 7: Click the appropriate section that needs modification and make any needed changes.

STEP 8: Click the **Sign** icon.