
This Quick Reference Guide (QRG) reviews how to manage a PowerForm.

Add a PowerForm to a Patient Chart

➤ **From the Ambulatory View in the patient's chart:**

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

STEP 2: Click the departmental folder to open the PowerForm within the folder.

STEP 3: Select the needed form's checkbox. Multiple checkboxes can be selected at one time.

STEP 4: Click **Chart**.

STEP 5: Chart in the form as needed.

STEP 6: Click the green checkmark to save the form to the chart.

View a Documented PowerForm

➤ **From the Ambulatory View in the patient's chart:**

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

STEP 2: Click the **Sort by** dropdown arrow.

STEP 3: Click **Form**.

STEP 4: Double-click to open the needed form.

STEP 5: Use the left-side summary as needed to navigate the form.

STEP 6: Review the necessary information.

STEP 7: Click the **X Close** button.

Modify a Documented PowerForm

➤ **From the Ambulatory View in the patient's chart:**

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

STEP 2: Click the **Sort by** dropdown arrow.

STEP 3: Click **Form**.

STEP 4: Right-click to open a short menu.

STEP 5: Click **Modify**.

STEP 6: Use the left-side Summary as needed to navigate the form and make needed modifications.

STEP 7: Click the **Sign** icon.

Review PowerForm History

➤ From the Ambulatory View in the patient's chart:

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

STEP 2: Click the **Sort by** dropdown arrow.

STEP 3: Click **Form**.

NOTE: When there are multiple editors to a PowerForm the form will say, multi-contributors.

STEP 4: Right-click to open a short menu.

STEP 5: Click **History**.

STEP 6: Click **Close** when finished.

Unchart a PowerForm

➤ From the Ambulatory View in the patient's chart:

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

STEP 2: Click the **Sort by** dropdown arrow.

STEP 3: Click **Form**.

STEP 4: Right-click to open a short menu.

STEP 5: Click **Unchart**.

NOTE: As a best practice only unchart a PowerForm once the correct form has been charted if one is needed.

STEP 6: Enter a reason for uncharting in the **Comment** field.

STEP 7: Review the date and time are correct making changes as needed.

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