How to Manage Patient Forms

On the Forms tab, you can view historical versions of forms and add new forms based on the Patient's answers. A complete form requires a response for each statement/question. You can modify a Patient's saved form up to 72 hours after its creation. After 72 hours, the form is locked from any further changes. Currently, the following forms are available:

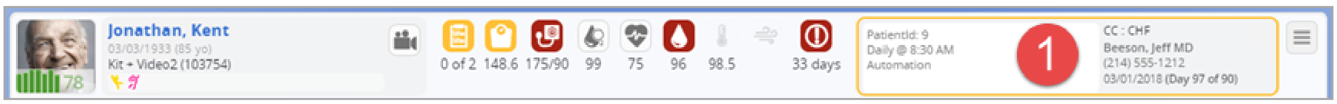
- *Risk Stratification* – Risk is determined by selection of the Risk level for the Patient on the Demographics page or responses from the Patient on the Risk Stratification form. The Risk Stratification form includes categories of statements/questions.
    - Chronic Diseases
    - Age
    - Perception of Health
    - Education Level and Income
    - Living Geography
    - Socioeconomic Factors
    - Acute Care Assessment
- *Health Assessment* – Provides the Care Team with questions to ask a Patient to help assess the Patient's current health. The Health Assessment form includes categories of statements/questions.
    - Depression
    - Physical Activity
    - Nutrition
    - General Health
    - Safety
    - Mental Wellness
    - Intellectual Wellness
    - Stress Management

- Values, Spirituality, and Beliefs
- Medications
- Understanding of Care

- *Barriers to Care* – Provides the Care Team with questions to ask a Patient to help determine any obstacles deterring the Patient from effective self care.

To open the Forms tab:

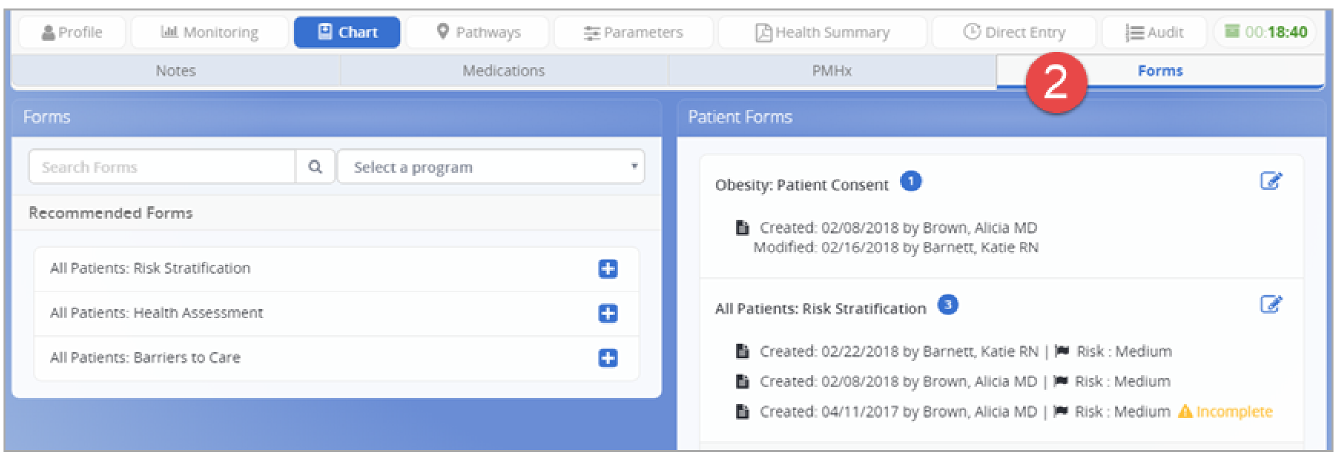
1. On the **Patients** page, click in the right section of a Patient header.



   The **Patient Chart** page appears with the **Notes** tab selected by default.

2. Click the **Forms** tab.

   The Forms page appears.



Add a new form

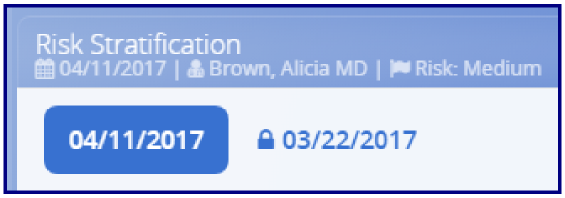
1. In the **Search Forms** box, type the name of the form you want to add or use the program list, to sort available forms by program.
2. Click ➕.

   A new form appears with no answers highlighted.

3. Click the appropriate answer based on the patient's responses.

4. Click **Save Changes**.

   A new date appears at the top of the form. You can click the dates to switch between the historical records.



Note: If you skip a question, an incomplete indicator will appear.

View an existing historical form

1. Click **View History**.

   The form appears with the patient's previous answers highlighted.

2. Do either of the following:

   - Click **Cancel** to close the form.
   - Click + **Add Form** to open a new form of the same type.