Use of EPR Forms – EHR

1. The **Forms** tab in the EHR module is where a user can access, enter and edit Forms.

2. To add a form to a patient chart; click the **Create a New Record** icon to bring up the **Add Form** window. The user can select which pre-existing form they would like to add to the selected patient.
3. The chosen form will now be available for the user to fill out. As each question is answered, it will be stamped with today's date. The user can navigate through the form using their computer mouse or using their keyboard.

**Navigating forms using your keyboard:**

- If using the keyboard, remember the following navigation keys
- Up/Down arrows
- Spacebar to activate the answer window for a Long Text answer
- Esc key to close a Long Text answer window
- Use letter key representing the first letter in List type answer
- Y or N keys for Yes/No type answers

**Setup of EPR Forms – Maintenance**

1. **EPR Forms** can be created and managed in the **EHR** tab of the **Maintenance** module. The icons related to Form setup and management are: **EPR Form Setup**, **EPR Image Codes**, **EPR Answer Lists**, and **Answer Schemes**.
2. The first step in form setup is outlining the basic parameters of the form; name type, location and availability. If this form is to be available as an iForm in Health Access, it is important to determine this at this step; in addition to deciding if the form will require multiple instances for a patient (for example, a treatment-related form could be used at multiple times dependant on how many times a certain treatment-type was completed; but a health-history form would be only created once and periodically updated).

**Form Instructions:**

*The user would setup any generic Form Instructions behind the icon.*
3. Determining how many pages the form will have is next (each page will appear as a separate tab in the EHR).

iForm Availability:

*If this is a form to be used as an iForm, each page will have to be made available (it is possible to have only certain pages of a form available while others are not).*
4. It is important to allow access by clicking on the **Level Access** icon for the preferred users at this step as well, if access is not granted then the user will not be able to view or use the form.
5. Once the pages have been outlined, the actual question/answer setup can now be completed in the **Form Page Definition** window (available behind the icon in the **Form Pages** window).

This is an example of how the form will appear once all questions have been setup.
<table>
<thead>
<tr>
<th>Form Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>This is a heading - bold and left justified</strong></td>
<td></td>
</tr>
<tr>
<td>This is a y/n question</td>
<td></td>
</tr>
<tr>
<td>This is a y/n question with subquestions - checklist</td>
<td></td>
</tr>
<tr>
<td>Checklist item 1</td>
<td></td>
</tr>
<tr>
<td>Checklist item 2</td>
<td></td>
</tr>
<tr>
<td>Checklist item 3 w/ nested checklist</td>
<td></td>
</tr>
<tr>
<td>Nested Checklist item 1</td>
<td></td>
</tr>
<tr>
<td>Nested Checklist item 2</td>
<td></td>
</tr>
<tr>
<td>Checklist item 4</td>
<td></td>
</tr>
<tr>
<td>Additional Info</td>
<td></td>
</tr>
<tr>
<td>This is a text answer question (30 characters max)</td>
<td></td>
</tr>
<tr>
<td>This is a question requiring a numerical value answer</td>
<td></td>
</tr>
<tr>
<td>This is a list type question - select one item only</td>
<td></td>
</tr>
<tr>
<td>This is a date type answer</td>
<td></td>
</tr>
<tr>
<td>This is a long text question (4000 characters max)</td>
<td></td>
</tr>
<tr>
<td>This is an image type question</td>
<td></td>
</tr>
<tr>
<td>The answer to this question will populate the red alert box as Cur...</td>
<td></td>
</tr>
<tr>
<td>This question will populate the Alerts box as a medical alert</td>
<td></td>
</tr>
<tr>
<td>This question is required</td>
<td></td>
</tr>
<tr>
<td>This is a grid type question with pre-defined Columns</td>
<td></td>
</tr>
<tr>
<td>Reading One</td>
<td></td>
</tr>
<tr>
<td>Reading Two</td>
<td></td>
</tr>
<tr>
<td>This is a grid type answer with NO pre-defined Columns</td>
<td></td>
</tr>
<tr>
<td>Reading One</td>
<td></td>
</tr>
<tr>
<td>Reading Two</td>
<td></td>
</tr>
</tbody>
</table>
6. Clicking the **Create a New Record** icon will give the user a drop-down menu to choose from.

   ![Form Page Definition](image1)

7. Once a heading has been added; the user can now start defining the questions and associated answers. The available **Answer Types** are: **Yes/No**, **Text**, **Number**, **List**, **Date**, **Long Text**, **Image**, **Calculated** and **Attachment** (note that **Calculated** answers would require a function created by axiUm Support staff).

   ![Form Item - Heading](image2)

   **Form Heading:**
   
   *A heading is not necessary, but aids in organization.*

   The checkbox “Approved answer can be changed by users who ‘Require Approval’” is recommended as selected. Having this checkbox selected allows a user to make a change on a complete and approved form; if this is not selected once a form is completed and approved no changes can be made.
8. Questions can be setup to have a sub-question below it. There are only two Question/Answer Types available to Sub-Questions: Checklist and Additional Info.

**Checklist Answer Types:**

*If selected a Checklist, remember the only Answer Type available to a Checklist is Yes/No.*
9. To setup the **Sub-Question**, the user would select **Checklist Item** from the **Create a New Record** icon drop-down menu.

10. Another feature of the forms area is to allow a nested checklist setup within the checklist, as setup in the example below.
This is one way to organize a form, having questions relevant only to a certain question’s answer appear if the user chooses the appropriate answer. For example if the question is “is the patient missing teeth” and the user selects “Yes”, then an additional checklist could open asking user to indicate which teeth; this last question would be entirely unnecessary if the patient didn’t have any missing teeth.

**Nested Checklists:**

Nested checklists are hidden in EHR unless answered, and then any nested questions will remain expanded to show the entered answers.

11. The **Reference Codes** are an additional feature, allowing the user to assign a unique code to each question. This allows the system to pull relevant reports in the **Info Manager** area of the program using these **Reference Codes**.

**Reference Codes**

It is recommended a school adds the **Reference Codes** at the initial form setup. If the school decides in the future that they want to report on this form, then they will have an accurate history of the information.
12. The second type of **Sub-Question, Additional Info**, is setup similarly to a Checklist. The only difference being that an Additional Info question has more **Answer Type** options: Yes/No, Text, Number, List, Date, Long Text.
13. All **Answer Types**, with the exception of **Yes/No** do not allow the creation of **Sub-questions**.
14. When creating questions with: **Number, List or Image** Answer Types, the user can setup the **Answer Scheme, Answer List** or **Image Answer** within the question setup window.

![Diagram showing form item setup](image)

Simply clicking on the ellipsis button will open, in this instance, the **Answer Schemes** window. This area allows the user to define the numbers allowed within the answer to the selected question. The way the **Increment** field is setup here is allowing the user to answer the selected question with whole numbers only.
15. As mentioned, a question with a **List** Answer Type is similar to that of a **Number** Answer Type. Behind the ellipsis button, the user can setup the answer options that would show as a drop-down list in the completed form.

The only difference is that the initial screen is a naming convention and the actual setup would take place behind the **i** icon.
16. A **Date** Answer Type will allow the form user to either enter the date by month/day/year (07/20/1969), or clicking on the drop-down arrow in the answer field will open a calendar.
17. A Long Text Answer Type allows the user to enter more detailed information relating to the question asked.

18. As with Number and List Answer Types the user can link the preferred Image using the ellipsis button within the question setup window.
19. As discussed earlier Reference Codes can assist with reporting purposes. By adding “RX” to the beginning of a Reference Code, the system will populate the answer entered for this question under the Current Medications heading in the Alerts window of the EHR.
20. As with the Current Medications alert, a Medical Alert can be setup to populate the Alerts window in the EHR if linked properly.
Once in the **Additional Definitions** window, the user decides which value (Yes or No) will trigger the linked **Medical Alert** to populate the **Medical Alerts** area in the **Alerts** window in the **EHR**. If preferred for easy reference, a specific color can be assigned to the Alert.
Clicking on the ellipsis button in the Additional Definitions window beside the Medical Alert field will open the Medical Alert Codes window; it is here the user would link the specific Medical Alert to the question.

Adding a NEW Alert

If the Alert doesn’t exist, this window does allow the user to add a new alert without having to exit the window.
EHR Display Options:

An important setup note to remember is that in order for the Current Medications and Medical Alert flags to work properly, the EHR Display Options must be correctly set. This window can be accessed in the EHR tab of the Maintenance module, behind the EHR Display Options icon.
FAQ – EPR Form Setup

The image shows a screenshot of an EPR (Electronic Patient Records) system with various tabs and options including:
- Clinical Note Codes
- Clinical Note Answer Lists
- Medical Alerts
- Problem Codes
- Problem Status Codes
- Objective Status Codes
- Attachment Sections
- Attachment Displays
- Consent Codes
- EPR Image Codes
- EPR Answer Lists
- EHR Form Setup
- Drug Definitions
- Drug Frequencies
- Pharmacies
- Chart Add Disciplines
- Treatment History Views
- EHR Display Options

These options are part of the Maintenance section of the EPR system, which is used for setting up and managing various aspects of patient data and clinical workflows.
21. A **Required** question will prevent the user from completing a form without it being answered.

In the completed form, in the EHR, a **Required** question will be highlighted in pink.

```
This question is required
```

If the user tries to proceed without answering the **Required** question, a warning message will appear asking the user if they wish to continue.
To setup a Required question, the user can choose to assign the requirement based on an appointment status; or by adding a <BLANK> status the user will require the question for all statuses.
Form Status Codes

If a status needs to be created, this can be done by going back to the original EPR Form Setup window and clicking on the Form Status Codes icon.
Once the applicable Form Status (if any) has been selected; the user can choose the **Required** questions simply by clicking on, and thus highlighting the preferred questions.
22. The final question type is a Grid or Spreadsheet. The first step in setting these up is to pre-define the columns.

Click the Pre-defined Columns button to further define the spreadsheet columns.
Column Pre-Definition:

If it is not necessary for the columns to be pre-defined, you can simply set the answer type and the maximum number of columns.
23. The rows will now need to be defined. Select **Spreadsheet Rows** from the drop-down menu to define the rows (or “X” axis of the spreadsheet).

**NOTE:** Not all the same answer type options are available when defining Spreadsheet Rows.