

After you complete the Electronic Forms workshop, a **TruBridge representative will contact you and let you know that all programs are in place, and you may begin working on your forms.** You may call into the install situation if you have any questions.

**The following employee security switches are used for Electronic Forms:**

- 13 (gives access to Business office tables). For those employees who will be building/maintaining the forms.
- 15 (gives access to Master Selection). For those employees who will be building/maintaining forms.
- 65 (gives access to the Electronic Forms maintenance). For those employees who will be building/maintaining the forms.
- 91 (*should be turned on ONLY for those who will DELETE forms off of a patient account*).
- 98 (gives access to Electronic Forms on a patient account. This switch should be set to “Y” for all employees who need access to Electronic Forms to chart on the patient. The default is set to “N”. **An Executable File can be run by TruBridge if site requests this be done in order to allow all employees access.**
- **Digital Images:**
  - EE security > Special Functions > System Management > System Security > Employee Security > page down > **Enter a Y in Allow Uploading Images and Allow Viewing Uploaded Images.**
  - Dept. Security > Special Functions > System Management > System Security > Department Security > page down > **Select Allow Uploading Images Y/N.**
  - Document Tables > In the title field enter the following: **UPLOADED IMAGE**
    - Path: Hospital Base Menu > Master Selection > Business Office Tables > BOT Maintenance Menu > Image Titles > Document Titles.

**Electronic Forms software:**

- **Electronic Forms software** – Path: Master Selections, Business Office Tables, Maintenance Menu, Electronic Forms, Select any form title, and then Preview. You should get the message (or a similar message) “the current software does not match...would you like to update the software?” Click “Ok “to update the software, accept all defaults, then select “open”.
- **Signature Device Driver** - If you know that you will be using a signature pad, then the model number should be entered during this install process.

Test opening forms on a test patient and through maintenance. Note any errors or problems that are encountered and call into your install situation with the specific information.

**Path to open a form in maintenance:** Hospital Base Menu, Master Selections, Business Office Tables, Maintenance Menu, Electronic Forms, select form title, preview.

**Path to open a form on a patient:** Hospital Base Menu, select a patient (please use a test patient), Electronic Forms (Note: at least 1 form will need to be marked as “Live” on the master/permissions tab of an Electronic Form in maintenance).