Edit a Form

As a Regional Administrator, you can edit existing forms to update the Name and Description of a form or change the Default or Visible selection. If you need to make changes to questions or fields on a form, you can do that through the Design process.

Note: When you edit a form, you cannot change the form Type.

To edit a form

1. On the upper right, click **System Settings**.
2. On the left, under *Other Settings*, click **Patient Forms**. The *Forms Configuration* page opens.
3. Locate the form you want to edit. On that row, in the **Actions** menu, click **Edit**. The *Edit Form* page opens.
4. Edit and/or select this information:
   a. **Name** - Title of the form, which will be used on the Forms Configuration page and form selection menu.
   b. **Description** - Details or information that will help users understand why and when to use the form.
   c. **Default** - Selection identifies the Web - Add form that is open by default when users accesses the page in EMTrack. Only Web - Add forms have the default option.
   d. **Visible** - Selection makes the form available in the EMTrack Web or Mobile application. Only one Web - Edit form can be visible at a time; however, more than one Web - Add and Mobile form can be visible.
5. In the Regional Availability section, identify which providers you want to have access to the form.

If you want the form to be available for...	Then...
All providers in the region,	Verify the default Form available for all providers in the region is selected,
Selected providers in the region,	Click Form available for selected providers in the region, Click Add Providers. The Add Providers window opens with provider labels on the left and providers on the right. If necessary, on the left, select label check boxes and click Search to filter the list of providers. Select the check box for providers you want to include. Click Confirm.

6. In the *Regional Availability* section, identify which user roles you want to have access to the form.

If you want the form to be available for...	Then...
All user roles in the region,	Verify the default Form available for all user roles in the region is selected,
Selected user roles in the region,	Click Form available for selected user roles, In the list, select the check box for user roles you want to include.

7. Click **Save**. The *Forms Configuration* page opens and your form appears in the list.