

# Using the PDF Forms Tab

This guide provides step-by-step instructions for navigating the PDF Forms Tab.

- PDF Forms has replaced the Forms tab
- All forms created under the old Forms tab have been moved to the PDF Forms tab

**1** Load the client chart and Navigate to the PDF Forms tab.

The screenshot displays a medical software interface for a patient named Aliya Middle Test. The patient's information is shown at the top: Aliya Middle Test - 1980/02/28 - 45y 25d - (Female) - OT168143514165. The interface includes a navigation bar with tabs for Personal Info., Chart Notes, PDF Forms (highlighted with a yellow circle), and Documents. Below the navigation bar, there is a section for adding forms, grouped by Form Group. The form groups listed are Notifiable Disease Report, Prenatal, Rourke Baby Record, and TB Referral. The interface also shows a toolbar with icons for EHR, New, Save, Refresh, and Find, and a Registry/Patients section.

2 Any existing forms will appear under this tab, grouped by form type.

+ Add

Grouped by: **Form Group**

Form Name	Created By	Created On	Modified By	Modified On	Id	Legacy
Notifiable Disease Report						
Prenatal						
Rourke Baby Record						
TB Referral						

3 View the existing forms by expanding each section.

+ Add

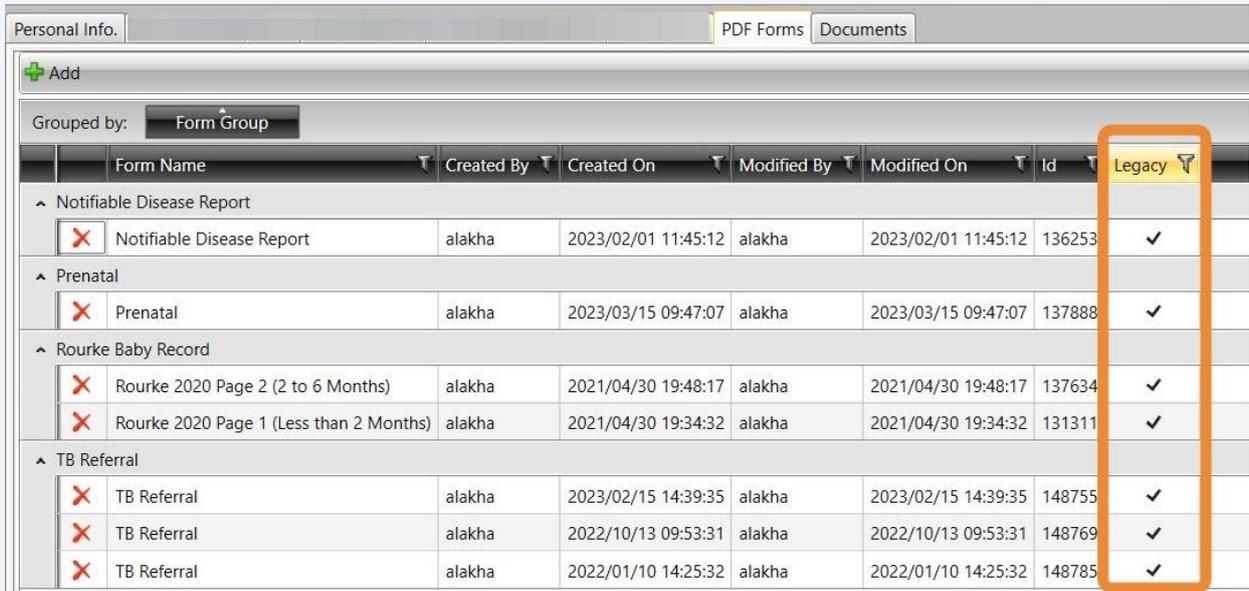
Grouped by: **Form Group**

Form Name	Created By	Created On	Modified By	Modified On	Id	Legacy
Notifiable Disease Report						
Notifiable Disease Report	alakha	2023/02/01 11:45:12	alakha	2023/02/01 11:45:12	136253	✓
Prenatal						
Rourke Baby Record						
TB Referral						



Tip! All forms that were previously saved under the Forms tab have been moved to the PDF Forms tab.

4 Forms from the old Forms tab will have a checkmark under the Legacy column.



Personal Info. PDF Forms Documents

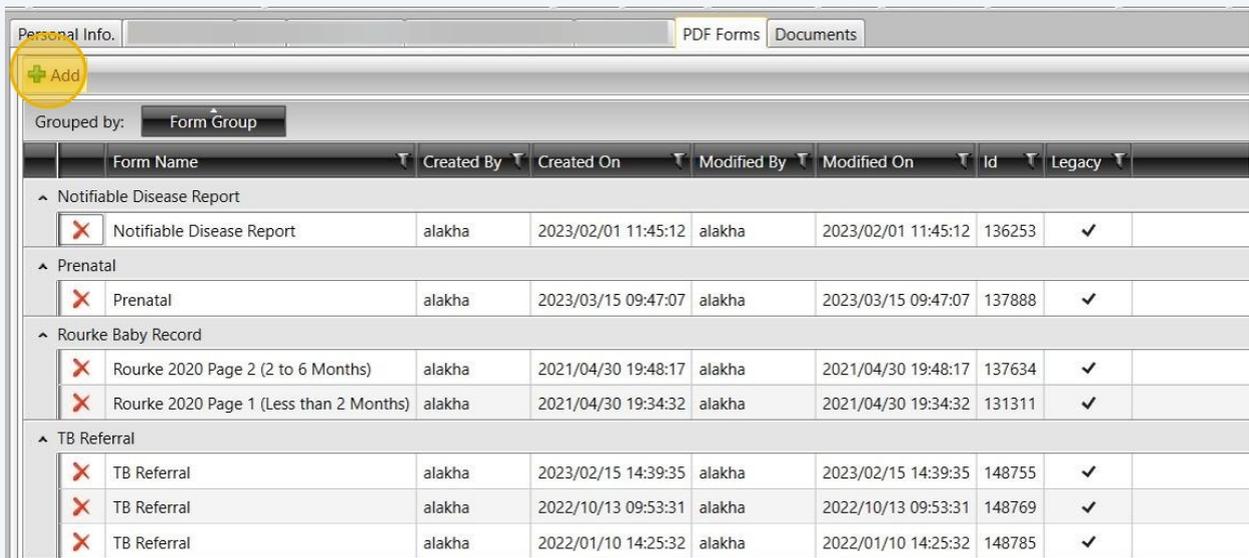
+ Add

Grouped by: Form Group

	Form Name	Created By	Created On	Modified By	Modified On	Id	Legacy
^	Notifiable Disease Report						
<input checked="" type="checkbox"/>	Notifiable Disease Report	alakha	2023/02/01 11:45:12	alakha	2023/02/01 11:45:12	136253	✓
^	Prenatal						
<input checked="" type="checkbox"/>	Prenatal	alakha	2023/03/15 09:47:07	alakha	2023/03/15 09:47:07	137888	✓
^	Rourke Baby Record						
<input checked="" type="checkbox"/>	Rourke 2020 Page 2 (2 to 6 Months)	alakha	2021/04/30 19:48:17	alakha	2021/04/30 19:48:17	137634	✓
<input checked="" type="checkbox"/>	Rourke 2020 Page 1 (Less than 2 Months)	alakha	2021/04/30 19:34:32	alakha	2021/04/30 19:34:32	131311	✓
^	TB Referral						
<input checked="" type="checkbox"/>	TB Referral	alakha	2023/02/15 14:39:35	alakha	2023/02/15 14:39:35	148755	✓
<input checked="" type="checkbox"/>	TB Referral	alakha	2022/10/13 09:53:31	alakha	2022/10/13 09:53:31	148769	✓
<input checked="" type="checkbox"/>	TB Referral	alakha	2022/01/10 14:25:32	alakha	2022/01/10 14:25:32	148785	✓

## Creating a New Form

5 To create a new form, click on Add.



Personal Info. PDF Forms Documents

+ Add

Grouped by: Form Group

	Form Name	Created By	Created On	Modified By	Modified On	Id	Legacy
^	Notifiable Disease Report						
<input checked="" type="checkbox"/>	Notifiable Disease Report	alakha	2023/02/01 11:45:12	alakha	2023/02/01 11:45:12	136253	✓
^	Prenatal						
<input checked="" type="checkbox"/>	Prenatal	alakha	2023/03/15 09:47:07	alakha	2023/03/15 09:47:07	137888	✓
^	Rourke Baby Record						
<input checked="" type="checkbox"/>	Rourke 2020 Page 2 (2 to 6 Months)	alakha	2021/04/30 19:48:17	alakha	2021/04/30 19:48:17	137634	✓
<input checked="" type="checkbox"/>	Rourke 2020 Page 1 (Less than 2 Months)	alakha	2021/04/30 19:34:32	alakha	2021/04/30 19:34:32	131311	✓
^	TB Referral						
<input checked="" type="checkbox"/>	TB Referral	alakha	2023/02/15 14:39:35	alakha	2023/02/15 14:39:35	148755	✓
<input checked="" type="checkbox"/>	TB Referral	alakha	2022/10/13 09:53:31	alakha	2022/10/13 09:53:31	148769	✓
<input checked="" type="checkbox"/>	TB Referral	alakha	2022/01/10 14:25:32	alakha	2022/01/10 14:25:32	148785	✓

6 Click on the form you would like to create. The form will open in a new window.

Personal Info. | Health Profile | Tasks | Growth Charts | Immunization History | Chart Notes | PDF Forms | Documents

+ Add

- Autopopulate (with NDR)
- Client Depo Provera Checklist
- Dropdown Test
- END OF LIFE
- End of Life Assessment
- EPDS Scoring Instructions v2023
- General Laboratory Requisition
- Hepatitis C Data Collection Form v2015
- Infant Assessment
- Maternal Assessment**
- Notifiable Disease Report v2018
- Prenatal
- Prenatal Assessment Record

Created By	Created On	Modified By	Modified On	Id	Legacy
alakra	2023/02/01 11:45:12	alakra	2023/02/01 11:45:12	136253	✓
alakra	2023/03/15 09:47:07	alakra	2023/03/15 09:47:07	137888	✓
alakra	2021/04/30 19:48:17	alakra	2021/04/30 19:48:17	137634	✓
alakra	2021/04/30 19:34:32	alakra	2021/04/30 19:34:32	131311	✓
alakra	2023/02/15 14:39:35	alakra	2023/02/15 14:39:35	148755	✓
alakra	2022/10/13 09:53:31	alakra	2022/10/13 09:53:31	148769	✓
alakra	2022/01/10 14:25:32	alakra	2022/01/10 14:25:32	148785	✓

7 To Save the form, click on the floppy disc icon on the top left of the window.

File

Save... | FAX | 1 / 1 | 48%

Save...

Analgesia		Self-Care
Other		Awareness of Infant Ter
<b>PHYSICAL ASSESSMENT</b>		Hx Depression
General Appearance		Domestic Violence
Breasts/Nipples		Postpartum Exercis
Fundal Height		Family Planning
C/S Incision		Post-partum check
Sutures/Staples		Immunization Stat
Lochia		EPDS Score
Perineum		Other
Pain Control		<b>RESOURCES</b>
Extremities		Printed Informatio
Bowels		Referrals
Bladder		Other
Hemoglobin		
Blood Glucose		Initial
TPR/BP		Print Name



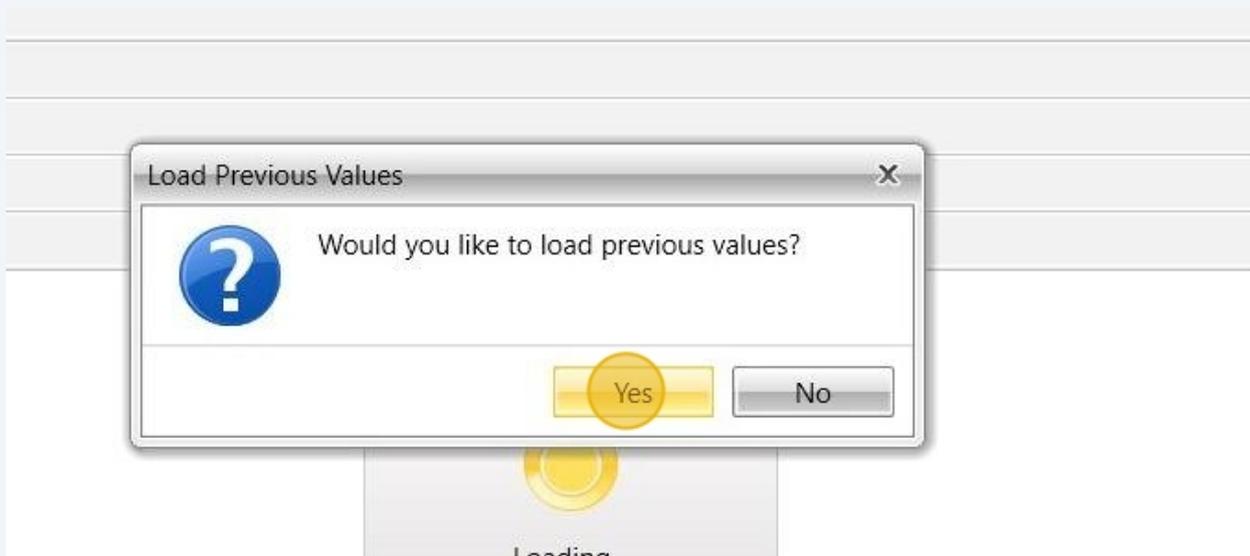
Tip! The following functions can be completed by the buttons on the top left corner of the form:

- Save
- Print
- Fax
- Navigate to the previous page
- Navigate to the next page
- Zoom



8

If you are creating a form that already exists, the App will ask you if you would like to load the data from the previous form.



Alert! Data can only be loaded from previous forms created under the PDF Forms tab (not the old Forms tab).



If you have any questions, please email [helpdesk@okaki.com](mailto:helpdesk@okaki.com)