

South West Digital Coalition EMR Form-Building Recommendations

The following recommendations for creating EMR-compatible forms have been developed by the Digital Coalition, a group digital health champions advocating on behalf of primary care in the South West. Users of PS Suite and Accuro EMRs representing a range of expertise contributed to these guidelines

✓	Item	Recommendation
	Image Quality	Build from an original, high-quality PDF. In PS Suite EMR, ensure a PNG image was exported from the PDF with a resolution of 150 pixels/inch for suitable printing/faxing (click "Settings" while saving the exported image file in Adobe)
	General Layout	Align elements such as checkboxes and text fields to the original form design. When building a form from scratch, ensure all elements are aligned appropriately
	Date	Select the appropriate date format as requested by the form designer. If no format is specified, use the YYYY/MM/DD format consistently throughout the form
	Font	Build with consistent font style & size. Maximize size (12 pt or greater if possible) without impacting print/fax quality. Reduce size in instances where original design does not allow for adequate space for the user to enter relevant information
	Non-user Information	Do not build in elements that are not relevant to the user such as "Admin Use Only" fields. If a separate page is dedicated to patient instructions, exclude them from the EMR-compatible form; consider including as a handout as an alternative
	Field Names	Name each element within a form that may require tracking. Field-naming allows data to be extracted for the purposes of program/service reporting and evaluation. Field-naming also allows for integration with other technology (ie. tablet surveys)
	Pre-Populated Fields	Select appropriate keyword properties within the EMR such as patient demographic info, provider demographic info, clinical data such as lab values, date of latest tests and lists of clinical information such as medications or allergies
	Mandatory Fields	Ensure elements that have been indicated by the designer as mandatory are set as mandatory or "required"
	Text Areas	Instruct the user to attach relevant information if space is inadequate for lists of patient information such as medications, health history, allergies, etc. For print quality, erase or build an opaque text area overtop of multiple lines if necessary
	Checkboxes	Build checkboxes to produce an X on the printed/faxed copy as oppose to a ✓
	Mutually Exclusive Elements	Ensure sets of items such as Yes/No questions that are intended for the user to select only one option/answer function as mutually exclusive elements
	Diagrams	Ensure images/diagrams intended to be marked by the user are built to be "drawable" where applicable
	Form Name	Follow a consistent naming convention that clearly includes the name of organization and the type of service/program (generally the title of the form)
	Test	Adequately test the completed form for functionality; print to assess appearance