

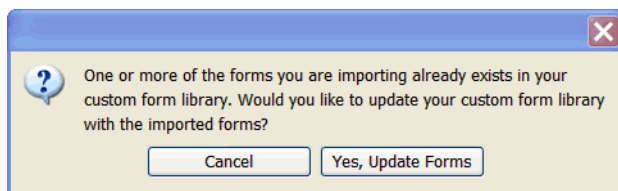
# PS Suite® Software

## Importing Custom Forms

*You can easily add new custom forms to your list of available forms if you receive forms from a colleague or from PS Suite software.*

To use the form, you must import the custom form file (.cfm file) into your PS Suite EMR. You can import one or more files at a time.

If are adding a custom form that already exists in your PS Suite EMR, you will be asked whether you want to update the form. If you have made any customizations to the existing form within your system, **DO NOT** choose to update because this will replace your existing custom form and will overwrite any of the changes that you have made to that custom form.



### Steps

1. Copy the custom form files (.cfm files) that you were given to a folder on the desktop of your computer. If you were given the files in a compressed or zipped file, double-click the .zip file to unzip the folder (or right-click and choose to unzip).
2. In PS Suite EMR, from the **Records** window, choose **Settings > Edit Custom Forms**.
3. To import files by selecting them from a list, follow these steps:
  - In the **Forms** window, from the **File** menu, choose **Import Form(s)**.
  - Navigate to your computer's desktop and double-click the folder that contains the custom form files.
  - Click the custom form in the list that you want to import.

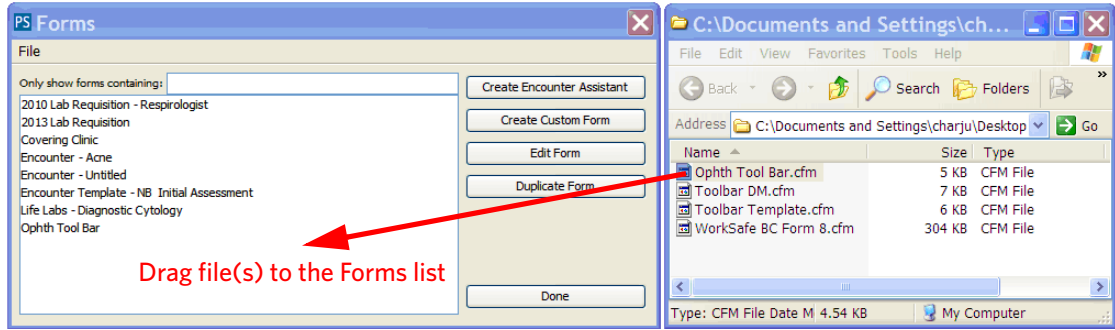
**Tip:** To import more than one file at once, click the first file, hold down the SHIFT key on the keyboard and then click the last custom file in the list. This will highlight all of the files within the list.

- Click the **Choose** button. If you are importing multiple forms at once, and depending on the speed of your computer, the import may take 30 seconds or more.
4. To import files by dragging and dropping, follow these steps:
    - Navigate to the desktop and double-click the folder that contains the custom form files to import.
    - Position both the folder window with your custom form files and the PS Suite **Forms** window that lists all of your existing custom forms side by side so that you can see both windows.
    - Drag the highlighted custom forms files from that folder on the desktop and drop the files in the custom forms window.

**Tip:** To import more than one file at once, before you drag the files, click the first file, hold down the SHIFT key on the keyboard and then click the last custom file in the list. This will highlight



all of the files within the list.



5. A message informs you whether the import was successful.

## Questions?



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