

## How to Upload forms into the EMR

1. The easiest way to upload a form into the EMR is by working with a PNG file ([Hint: PDF files can easily be converted into a PNG file through Canva](#)). Technically PDFs can be uploaded, but for simplicity I recommend using PNG copies of your form
  - a. The PNG file CANNOT exceed 1MB. If there are multiple images, the total size needs to not exceed 1MB. ([Hint: on Canva, you can limit the size to 1000 KB when downloading your PNGs](#))
2. Open the EMR → Records → Settings → Edit Custom Forms → Create Form → Name the Form. Make sure you adjust the Zoom so that you can see the entire blue rectangle area.
3. Select the “picture” tool from the right side toolbar then highlight the area WITHIN the blue rectangle with your mouse (click & drag). Locate the PNG file and upload it.
  - a. The size of it will need to be adjusted. Select the selection tool and click the image. Locate the “scale” property and adjust the 1.0 → 0.36 (this value can change, but often produces a good fit). Click and drag the corner square to fill the image WITHIN the blue rectangle. Test print it to make sure. If it comes up as 2 pages, the picture went beyond the blue rectangle and needs to be fixed.
4. Select the image and select “In Background” within properties. Once you confirm yes, the image can no longer be modified.
  - a. To undo this: Edit → Find and Select Items... → Type → Picture. A dotted frame will appear on the image and you can deselect the background property and make your adjustments.
5. If you want to add a second page: Custom form → Change Height → adjust the number of pages.<sup>1</sup>

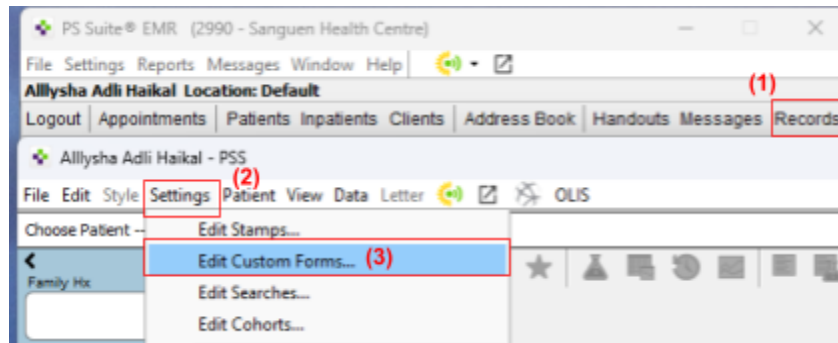
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<sup>1</sup> For a more detailed explanation on everything custom form related, please refer to the following links: [Designing Custom Forms eLearning Course](#) and [Custom Forms Guide](#)

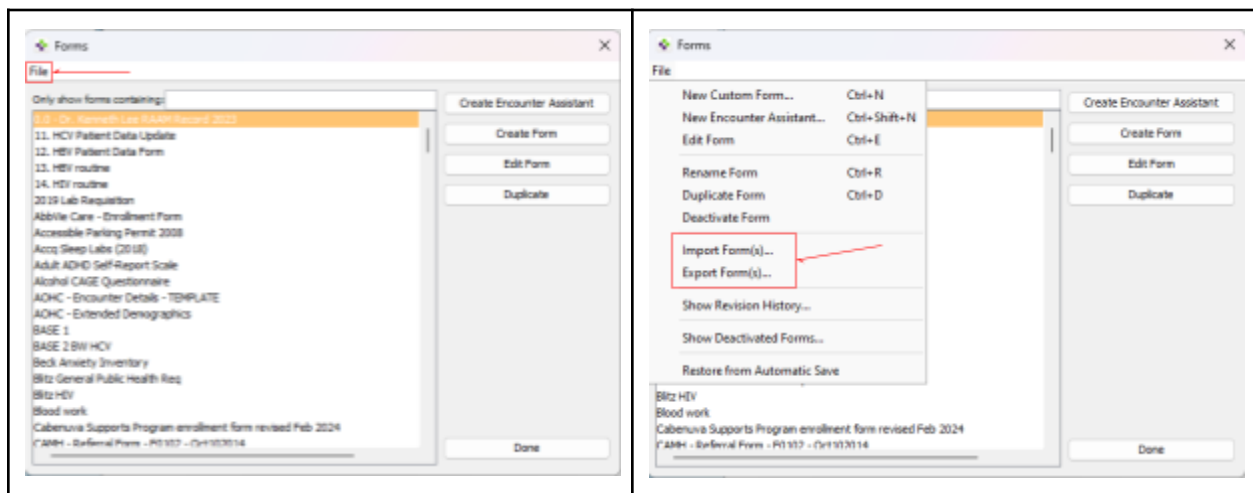
**Note:** To use FULL custom form editing software, call PSS IT to receive an Editing Licence Key. Make sure the EMR is open as the IT will remotely access your device to input the key for you. However, you should be able to do basic editing without the editing licence key.

## How to Import Custom Forms (.cfm file) into the EMR

1. In the EMR, locate Records → Settings → Edit Custom Forms.



2. Once in the Forms window, locate the “File” menu in the top left corner and select Import Form(s).
  - a. Navigate to your .cfm file and import the custom form.



3. Hint: You should also be able to import your .cfm file by dragging and dropping into the forms window.

## How to Export Custom Forms (.cfm file) from the EMR

1. In the EMR, locate Records → Settings → Edit Custom Forms.
2. Click on the custom form you want to export.
3. Locate the “File” menu in the top left corner and select Export Form(s). You will be prompted with where you would like to export your file, and once completed it is ready to be shared to other PS Suite Users.