

Merge Forms

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

This describes the set up for Merge Forms. This provides the ability to generate PDF documents with patient data merged for the purposes of supplying to a patient. An example would be a hospital admission form where the patient demographics and identifier have been pre filled out for the patient.

The Merge Form is available for both the **correspondence** and **assessments** features.

Please Note: This screen is only available to users with "Administer Merge Forms" permission.

Accessing Merge Form from Correspondence

In order to make the merge form available on the patient summary screen system admin needs to add the form and set it as "Published." Administration -> Correspondence -> Merge Forms.

1. Click **Administration**.
2. Click **Correspondence**.
3. Click **Merge Forms** sub menu.
 - a. The Merge Forms screen will display.
4. From here you can:
 - a. Click **Show** to review existing merge forms.
 - b. Click **Download** to Download exiting forms.
 - c. Click **New** to Add new Merge Form.
5. **Create Assessment Merge Form** button.

Field	Description	Example
Merge Form		
Name	Enter a code for the templates in the Template field Tip – this might correspond to an existing document ID code or number	TRANS-001
Description	A name/description for the letter template.	Transfer Letter
PDF Template	Chose file	
Administration		

Published (check box)	This check box needs to be checked to publish or activate the form.	True/Yes/Checked
Notes		

Correspondence

New

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Merge Forms

Name	Description	Published		
qqq	qqq	No	Show	Download

Accessing Merge Forms from the Assessment Builder screen

The system administrator can access the assessment merge form by following the steps outlined below. Within this interface, you have the ability to add new merge forms, make edits to existing ones, and delete merge forms that are no longer needed. To view or download an existing merge form, simply click on the file name link.

*Please note: Incorrect mapping of the fields in between assessment and merge form will cause print errors in the system.
Example:*

*if the assessment field name as **FN** than PDF template also needs to name as **assessment[FN]** to pull the assessment information in the template.*

1. Click **Administration**.
2. Click **Assessments**.
3. Click on the drop down arrow on **Actions**
4. Click on **Merge Forms**.

Assessment merge forms

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Assessment Merge Forms for Admission Assessment - 8.1

Name	Enable For Default Printing	File Name		
Admission and Consent Form	Yes	Form_v9.pdf	Edit	Delete
Admission and Consent Form	No	Form_v9.pdf	Edit	Delete
zAdmission and Consent Form	No	form_v3.pdf	Edit	Delete
zzAdmission and Consent Form v10	No	form_v9.pdf	Edit	Delete

Add new Assessment Merge Form

After creating an assessment, it is *critical to accurately map the assessment fields to the merge form* to ensure successful printing. Specific forms elements will be replaced at time of printing with fields from the assessment.

1. Click **Administration**.
2. Click **Assessments**.
3. In the Assessments list, click **Show**
4. Click on the drop down arrow on **Actions**
5. Click **Merge Forms**.
6. Click **New**
7. Fill out the following fields
8. **Create Assessment Merge Form** button.

Field	Description	Example
Merge Form		
Name	Enter a code for the templates in the Template field Tip – this might correspond to an existing document ID code or number	TRANS-001
Enable For Default Printing	Print by default for assessment	True/Yes/Checked
Chose file	PDF Template	

Edit Assessment Merge Form:

1. Click **Administration**.
2. Click **Assessments**.
3. In the Assessments list, click **Show**
4. Click on the drop down arrow on **Actions**
5. Click **Merge Forms**.
6. Click **Edit**.

View Existing Merge Form:

1. Click **Administration**.
2. Click **Assessments**.
3. In the Assessments list, click **Show**
4. Click on the drop down arrow on **Actions**
5. Click **Merge Forms**.
6. Click on the file name link to download the form.

Form Variables

The PDF forms shall support the inclusion of PDF form fields with the names that match the allowed values via TriggerWrappers. The forms shall require that the form name match the format patient[attribute-name]

Supported fields are:

- Patient and Person model public attributes:
 - patient[given_name]
 - patient[family_name]
- Person custom fields:
 - patient[c_myfield]
- Home Address and Postal Address via relations:
 - patient[home_address][address1]
 - patient[postal_address][address_single_line]
- The patient's facility (via location relation):
 - patient[location][name]
- The patient's primary provider (via provider relationship):
 - patient[provider][first_name]
- The patient's health fund (via guarantor relationship):
 - patient[guarantor][name]
- The patient's current admission (via TriggerWrapper: Patient.current_admission):
 - patient[current_admission][admission_date]

Configuration for Merge Forms :

Global Setting Embed Printed Forms needs to be set:

- If global setting "Embed Printed Forms" is set to false then just send the PDF to the browser as a normal file download.
 - If global setting "Embed Printed Forms" is set to true, and the global setting "Auto Print" is set to false, then a dialog is displayed in the current browser window with the generated PDF displayed in the dialog. "
 - If global setting "Embed Printed Forms" is set to true, and the global setting "Auto Print" is set to true, the print dialog is automatically initiated for the PDF. "
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