

How to create a custom clinical workflow profile

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Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) to help users maximize the utilization of the clinical notes feature.

DrChrono has created the ability for users to create a custom clinical workflow profile.

Creating Custom Fields for Clinical Workflow Profiles

- [Navigate to Account](#)
- [Account Settings](#)
- [Custom Fields](#)
- [Custom Workflow Profiles](#)
- [+ New Profile](#)

The Action columns allow the user to edit or archive the profile.

Clinical Workflow Profiles

Clinical workflow profiles are groups of clinical forms that you can choose to start your clinical note progress, blablabla.

Active Profiles [+ New Profile](#)

Name	Description	Form Usage	Creator	Date Updated	Date Created	Action
⋮ New Patient Visit	A set of forms for new patient visit.	5 forms	Alice Bruce	03/21/2023	03/21/2023	✎ 🗑️
⋮ Follow-up Visit	A set of forms for follow-up patient visit.	6 forms	Alice Bruce	03/21/2023	03/21/2023	✎ 🗑️
⋮ General Surgery	A set of forms for general surgery.	7 forms	Alice Bruce	03/21/2023	03/21/2023	✎ 🗑️

Inactive Profiles

Name	Description	Form Usage	Creator	Date Updated	Date Created	Action
New Patient Visit	A set of forms for new patient visit.	5 forms	Alice Bruce	03/21/2023	03/21/2023	Unarchive
Follow-up Visit	A set of forms for follow-up patient visit.	6 forms	Alice Bruce	03/21/2023	03/21/2023	Unarchive
General Surgery	A set of forms for general surgery.	7 forms	Alice Bruce	03/21/2023	03/21/2023	Unarchive

Once the pop-up window appears

- Name the profile
- Description (ie: New Patient Visit)

- Add Form - applicable forms that should be associated
- Create

Create Clinical Workflow Profile ✕

Name

Description

Attached Clinical Forms

No forms have been attached to this workflow profile.

[Add Form](#)

[Cancel](#) [Create](#)