Clinical Form Management

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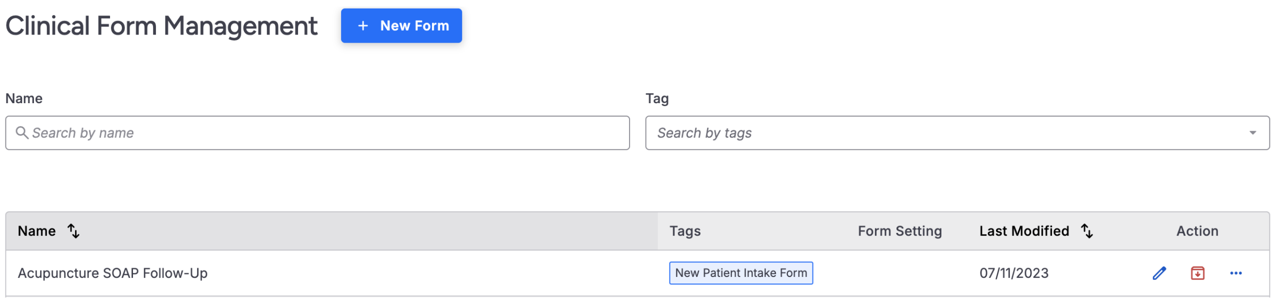
Clinical Form Management offers an improved workflow for creating and managing custom clinical templates. It includes enhanced features that streamline the form-building process. Both the updated and original form builders remain available and operate in parallel to support your preferred workflow.

> Clinical Form Management is currently only supported on Google Chrome.

Existing forms	Create a custom form
Custom form best practices	Preview form
Archive form	Share form

Searching and Managing Existing Forms



To view and manage your forms:

- Navigate to Clinical > Form Tools > Clinical Form Management from the main menu.
- Search by name or Search by tags
- Using the Name Column:
  - Forms are listed alphabetically by default.
  - Use the up/down arrows to sort A–Z or Z–A.
  - Use the search box to filter by form label.
- Using the Last Modified Column:
  - Click the up/down arrows to sort forms by the most recent edits.
- Using the Action Column :
  - Click the icons to:
    - Edit a form
    - Archive a form
    - Open the Options menu for additional actions
      - Only one form can be set as the default form at any time.

Custom Form Building

Creating a Custom Form

Changes are **automatically saved** as you build your form.

1. Navigate to Clinical Form Management
   - Go to **Clinical > Clinical Form Management** to begin building a new custom form.

2. Create a New Form
   - Select **New Form**.
   - A blank form will appear in the center canvas.

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3. Label the Form
   - Click **Options > Edit Form Info**.
   - Enter a **form name**, then select **Update**.
   - Once named, you can begin adding form elements.

Building Your Form

1. Add Form Elements
   - Open the **Form Elements** tab.
   - Drag and drop desired field tools into the **Add Here** sections of the form.

2. Add Field Rows
   - Hover between two field rows.
   - Click the **plus (+) icon** to insert a new field row.

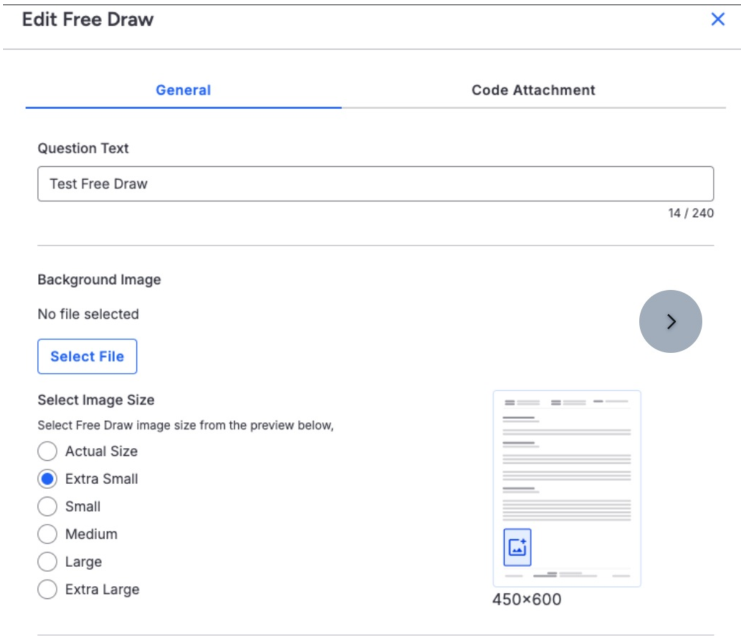
3. Manage Field Boxes

Hover over any field box to reveal quick action icons:
- **Edit** the field
- **Copy** the field to clipboard
- **Delete** the field

Resizing Free Draw Images for Clinical Notes

You can control the size of free draw images to ensure they fit properly in your clinical note PDFs. When setting up your form, you can choose from the following preset image sizes:
- **Actual Size** – Displays the image in its original size. If it's too large for the page, it will automatically scale down to fit.
- **Extra Small**
- **Small**
- **Medium**
- **Large**
- **Extra Large**

These size options are selected in **clinical form management** and will apply to all images added to that specific free draw field.



Editing Field Properties

Each form field includes three tabs:

General

- Set the field label, spacing, width, and field requirements.

Customized Note

- Create **generated text** using variables (e.g., value).
- Generated text appears in the clinical note and can be routed to the correct section of the clinical note PDF.

Billing Code Attachment

- Attach a single billing profile, if needed.

Form Type (Preset Only)

- **Form Type** determines how data is routed within a CCDA file.
- Form types are **predefined by DrChrono** and follow **HL7 standards**.
- Users **cannot create** custom form types.

Section Type Options

Set a Field as a SOAP Section

- A **Section Type toggle** is located above the Text and Variable controls.
- Choose between:
  - **New Section***(default)* – Includes **1 Generated Text** field
  - **SOAP Section** – Includes **4 Generated Text** fields: **Subjective**, **Objective**, **Assessment**, and **Plan**
- These fields populate the appropriate section in the clinical note PDF.

Set All Sections to SOAP

Use this **form-level setting** to apply SOAP formatting across all fields:

When Enabled:

- All fields act as **SOAP Section** fields.
- Each form element displays the full **SOAP layout** in the Customized Note tab.

When Disabled:

- Fields revert to **New Section** behavior (1 Generated Text field).

Data is preserved—SOAP content is hidden but not deleted. Re-enabling will restore previously entered SOAP-generated text.

Custom Form Best Practices

To ensure optimal performance and usability of Clinical Notes, follow these recommended best practices when building custom forms.

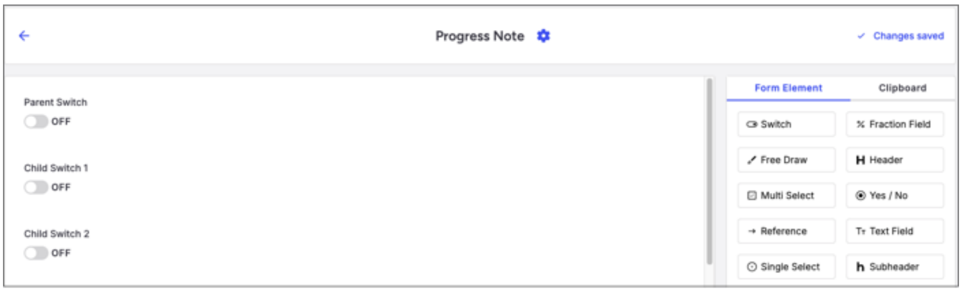
Keep Forms Small and Efficient

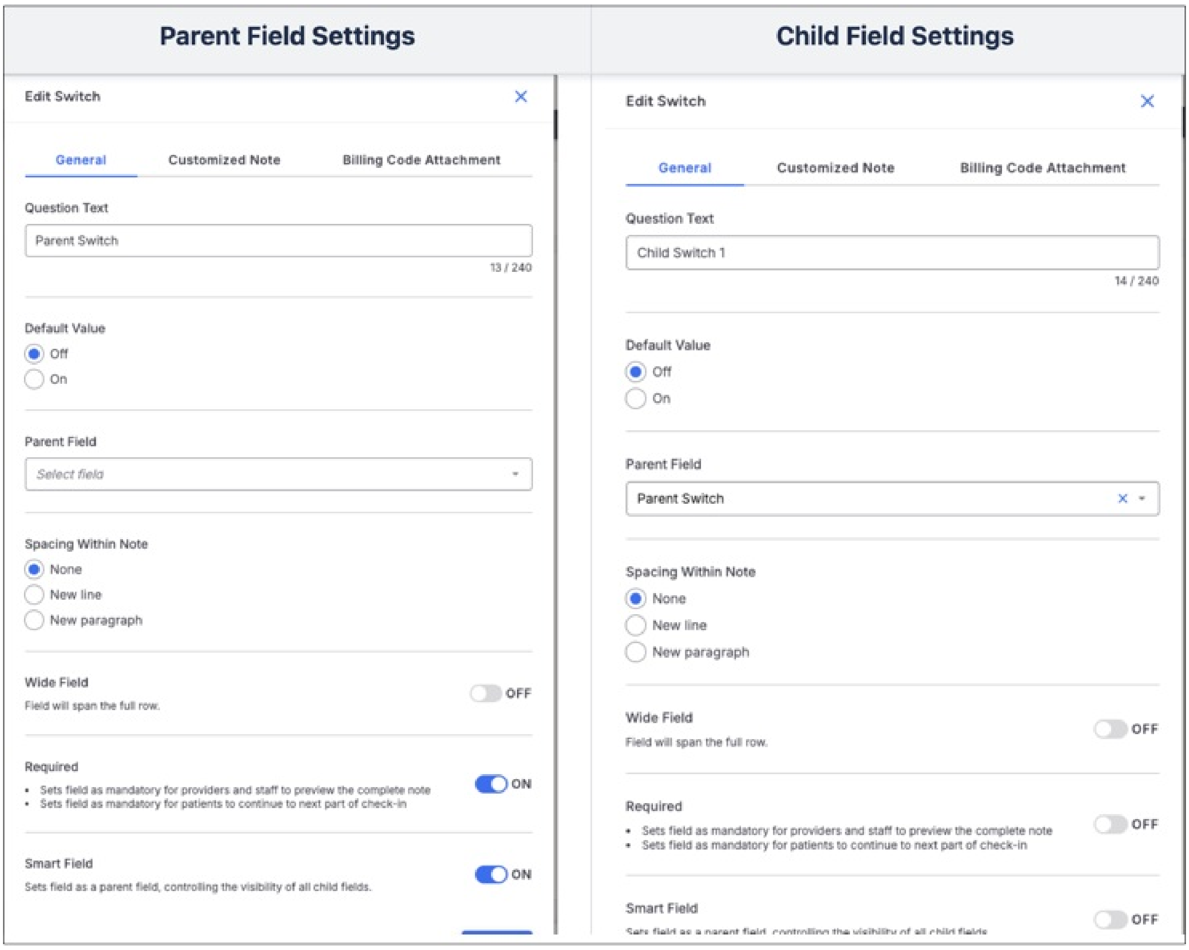
Large forms can lead to timeouts when loading, saving, or signing clinical notes. To reduce performance issues:

- **Limit smart field sub-fields to 55** per smart field
- **Keep total fields under 200** per form

Use Smart Fields Strategically

- Smart fields allow for **conditional display** of child fields based on the parent field's value.
  - To set up:
    - Turn on the **Smart Field toggle** for the parent field.
    - For each child field, choose the parent field name from the **Parent Field dropdown**.
- In the Clinical Note screen:
  - When the parent field is enabled, the child fields will be displayed automatically.



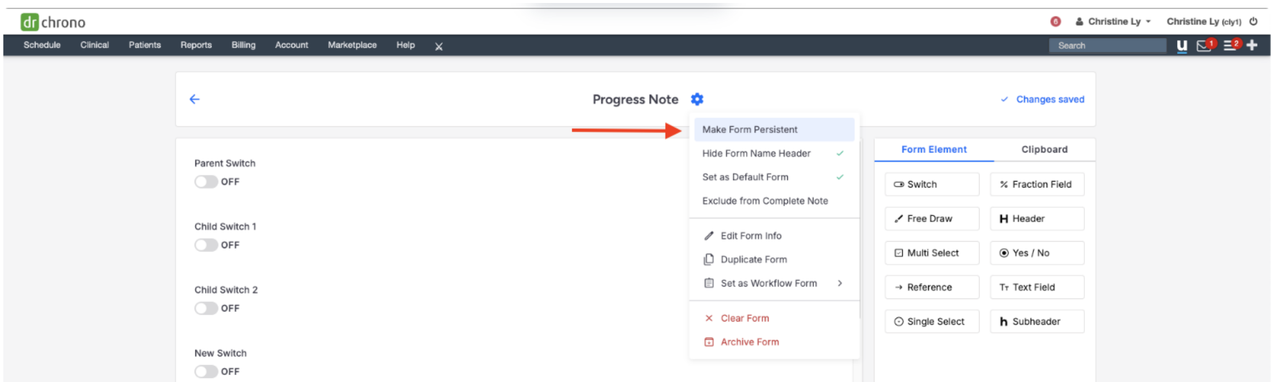


Set Forms to Be Persistent *Only* for Person-Level Data

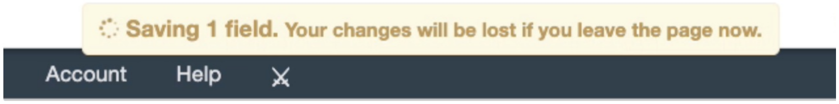
Use persistent forms only for static, **person-level data** that should carry forward across visits.

Examples: Family history, social history (e.g., "Father has Type 2 Diabetes")

- Persistent forms automatically **pull data from the most recently locked note** into future appointments.
- Do **not** use persistence for encounter-specific data.
- For reusing data from a past visit, use **Copy Previous Note** instead:
  - Select the form(s)
  - Choose the appointment's **date of service**



Allow the Save Process to Complete



DrChrono auto-saves your changes in real-time. A **save notification** appears when edits are made.

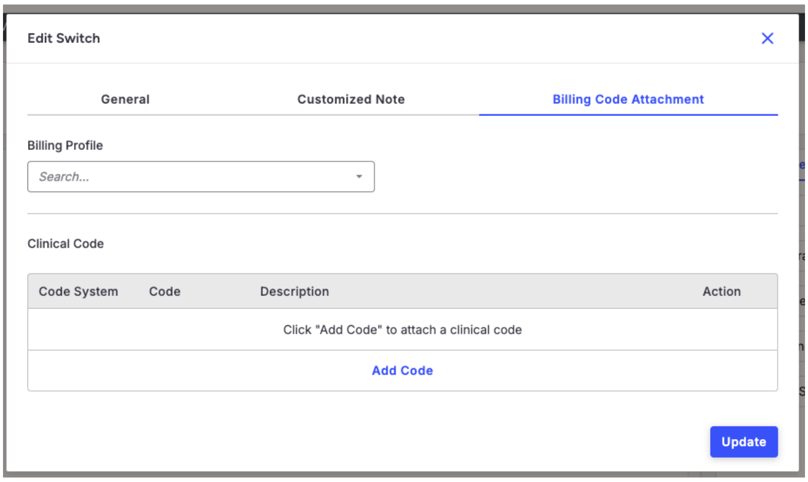
- **Wait until the save message disappears** before navigating to:
    - Another DrChrono tab (e.g., Calendar, Form Builder)
    - Another form within the same appointment
- Moving away too early may result in **data loss or out-of-sync content** (e.g., linked billing codes may not appear in the Billing section if the save isn't complete).

For example, if you turn a toggle switch on with billing codes linked and toggle to the billing section within the clinical note before the autosave notification has disappeared, the linked billing codes may not appear in the billing section as expected until the save process has been completed.

Do Not Link Both Billing Profiles and Clinical Codes to the Same Field

When attaching billing data to form fields:

- Choose **one**:
    - **Billing profiles** (allows use of **modifiers**)
    - **Individual clinical codes** (modifiers **cannot** be used)
- Avoid using both in the same field to prevent billing conflicts or loss of functionality.



Preview Form

> This feature is currently in beta, please contact customer support to enable it.
> Feature flag name (internal use only): react_form_builder_preview

Users can preview forms while building or editing them, eliminating the need to exit the application and access an existing appointment.

Archive Form

Learn more about steps to Archive and Restore a Form.

Archiving a Form

- Attempt to Archive a Form
  - Navigate to **Clinical > Clinical Form Management**.
  - In the **Action** column, select the **archive icon** for the form you wish to archive.
- Review the Pop-Up Notification
  - If the selected form is **linked to any unlocked clinical notes**, a **pop-up notification** will appear to inform you.

Viewing and Managing Archived Forms

- Access Archived Forms
  - Go to **Clinical > Archive (beta)** to view archived forms.
- Search for Associated Unlocked Clinical Notes
  - Locate the archived form in the list.
  - Use available options to:
    - **Search for any unlocked notes** still associated with the form.
    - Or **Unarchive** the form if needed for further use.
- A form cannot be fully archived if it is still in use by any **unlocked clinical notes**.

Sharing and Emailing Forms

You can share a form by uploading it to the **Form Library** or sending it via **email**.

- Access Form Sharing Options
  - Go to **Clinical > Clinical Form Management**.
  - In the **Actions** column of the desired form, click the **three-dot menu (...)**.
- Select the Share Option
  - Click **Share** from the dropdown menu.
- Choose a Sharing Method
  - **Upload to Library** – Makes the form available in the shared Form Library.
  - **Send as Email** – Opens a prompt to email the form as an attachment.