Clinical Form Management

Last modified on 01/27/2026 8:57 am EST

Beginning **February 2 through February 24**, we will start retiring the legacy Form Builder as part of the transition to **Clinical Form Management**. For more details and answers to common questions, please refer to our **FAQ** article.

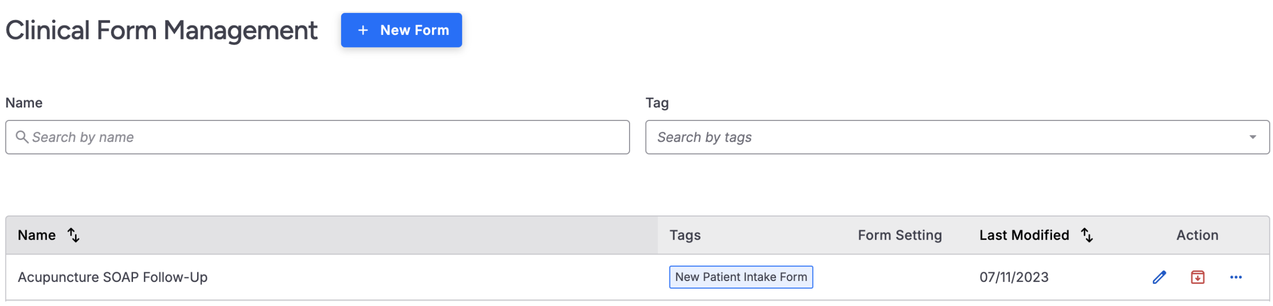
Legacy Form Builder Sunset

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.

Manage forms	Create a new form
Understanding Field Settings	Best practices
Archive form	Share form

Finding and Managing Your Forms



View Your Forms

1. Go to **Clinical > Form Tools > Clinical Form Management**

2. Your forms appear in alphabetical order by default

Search for Forms

- **By name:** Type in the search box to filter forms
- **By tags:** Use the tag search feature
- **Sort options:** Click the arrows next to column headers to sort A-Z or by last edited date

Quick Actions

Click the icons in the Action column to:

- **Edit** a form
- **Archive** a form
- **Options menu** (three dots) for more actions

> Only one form can be set as the default at a time.

Create a New Form

Your changes save automatically as you work.

Get Started

1. Go to **Clinical > Clinical Form Management**
2. Click **New Form**
3. A blank form appears in the center of your screen

Name Your Form

1. Click **Options > Edit Form Info**
2. Type a name for your form
3. Click **Update**

Add Form Fields

1. Open the **Form Elements** tab on the side
2. Drag the field type you want into the "Add Here" sections on your form
3. To add a row between existing fields, hover between them and click the **+** icon

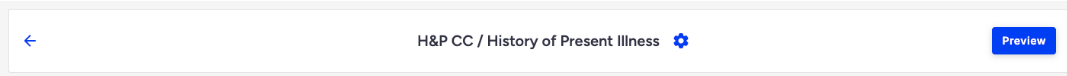
Edit or Remove Fields

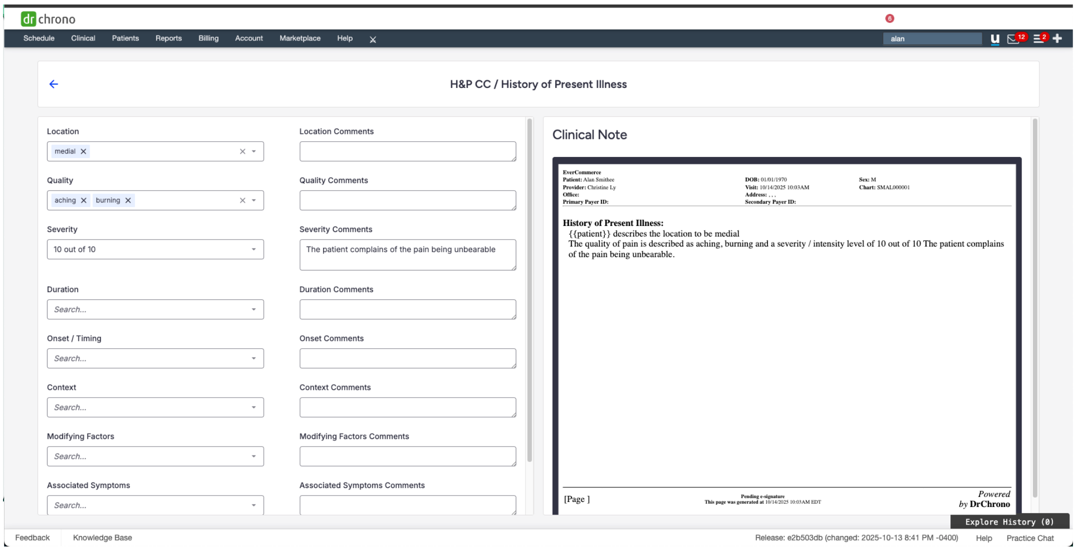
Hover over any field to see quick options:

- **Edit** the field settings
- **Copy** the field
- **Delete** the field

Preview Form

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





Understanding Field Settings

Each field has three tabs with different settings:

General Tab

Set basic properties like:

- Field label (the question or prompt)
- Spacing and width
- Whether the field is required

Customized Note Tab

Create text that appears in the clinical note using variables. You can route this text to the correct section of the PDF.

Character Count for Single & Multi-Select Form Fields

When creating single-select or multi-select questions:

- Each answer option can have up to **950 characters**
- A counter shows how many characters you've used (example: 125/950)
- If you go over 950 characters, the field turns red and you must shorten it before saving

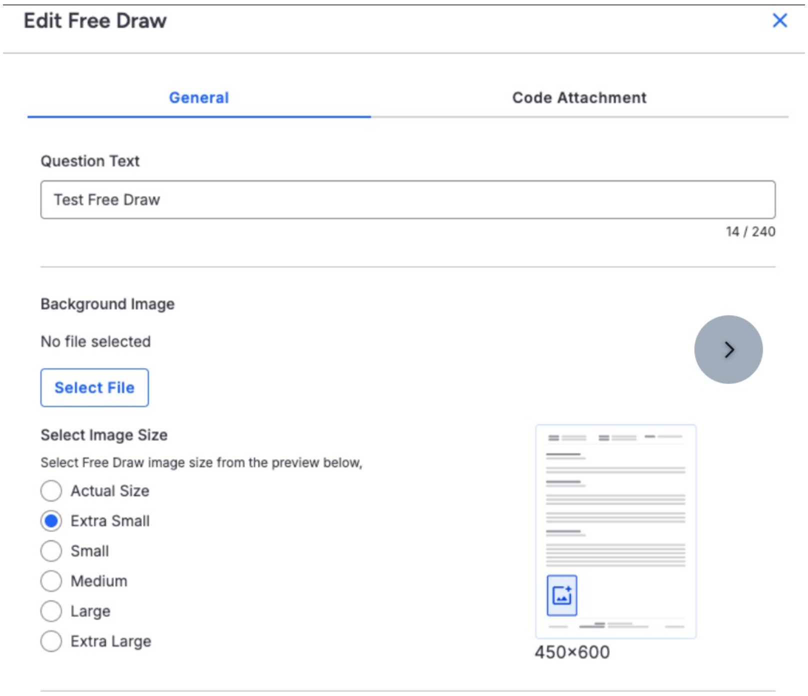
Free Draw Images

You can control how large free draw images appear in clinical notes. Choose from:

- Extra Small

- Small
- Medium
- Large
- Extra Large
- Actual Size (original size, auto-scaled if too 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.

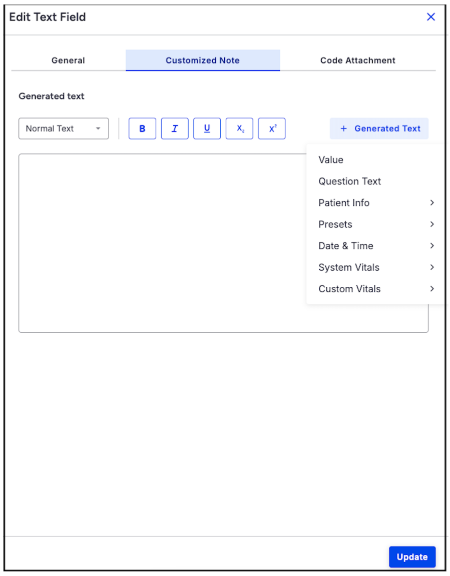
Billing Code Attachment

- 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.

Text Editor Feature



Format text in your forms to make information clearer:

Text styles:

- Normal text
- Heading (for main titles)
- Subheading (for secondary titles)

Formatting options:

- **Bold** – highlight important information
- *Italics* – emphasize medical terms
- Underline – draw attention
- Subscript – for chemical formulas (H_2O)
- Superscript – for notations (cm^2)

How to format: Select your text, click the toolbar, and choose your style.

You can combine formatting options (for example, bold and underline) to make key details stand out.

SOAP Section Format

SOAP stands for Subjective, Objective, Assessment, and Plan—a standard medical note format.

For individual fields:

- Toggle between "New Section" (1 text field) or "SOAP Section" (4 text fields)

For the entire form:

- Use "Set All Sections to SOAP" to apply SOAP formatting to all fields at once

- Turning this off hides SOAP fields but keeps your data safe—turn it back on to restore them

Smart Fields

Smart fields show or hide based on another field's answer.

To set up:

1. Turn on "Smart Field" toggle for the main (parent) field
2. For each related (child) field, select the parent field from the dropdown
3. Child fields only appear when the parent field is filled in

Best Practices

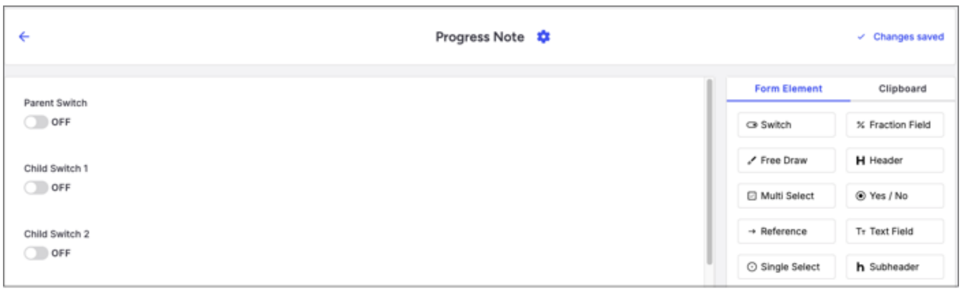
To ensure optimal performance and usability of Clinical Notes, follow these recommended best practices when building custom forms.

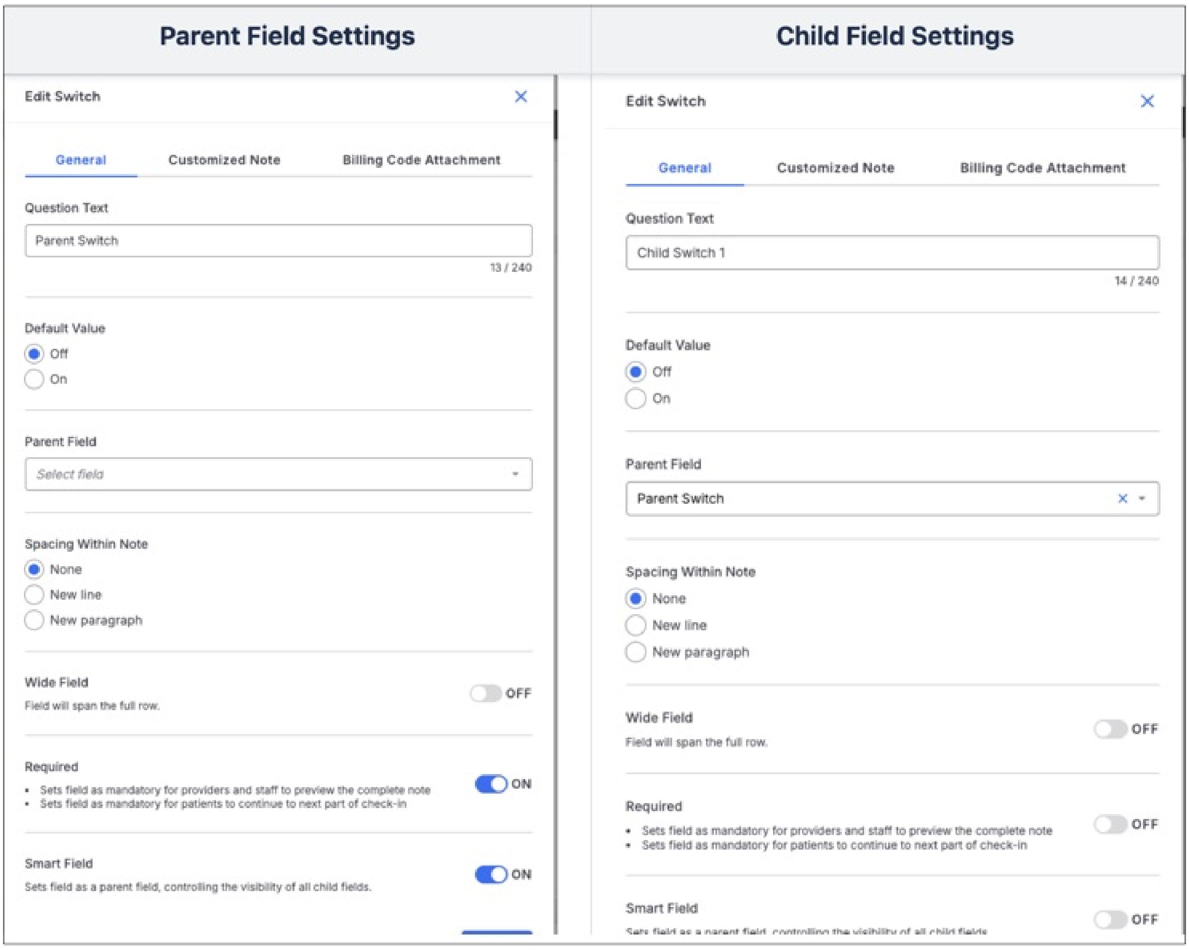
Managing Form Size

- Keep forms at 55 fields or fewer for optimal performance
- Forms with more fields may experience slower loading times and reduced responsiveness
- Consider breaking large forms into multiple smaller forms
- Remove any unused or duplicate fields to improve performance
- **Legacy Form Alerts:** Existing forms that exceed the recommended limit display warnings indicating they may not load as expected.

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

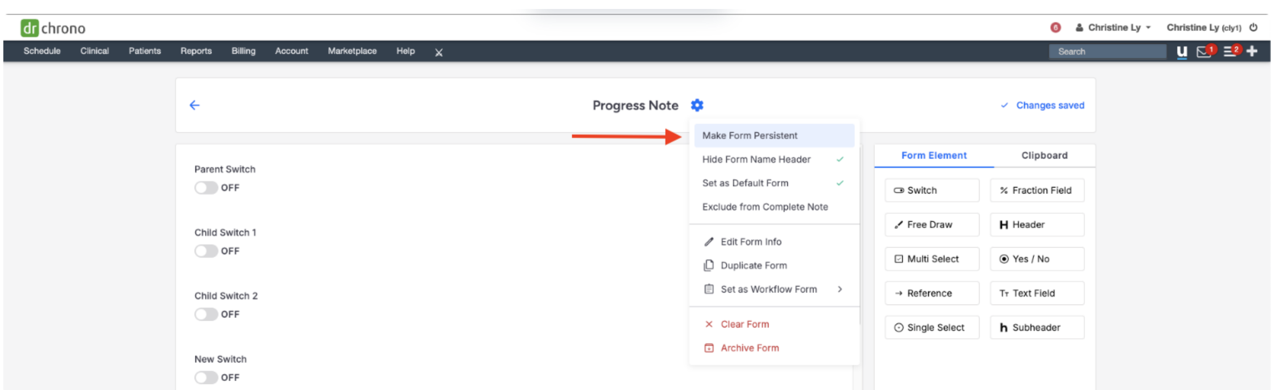
Use persistent forms only for static, **person-level data** that should carry forward across visits.

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

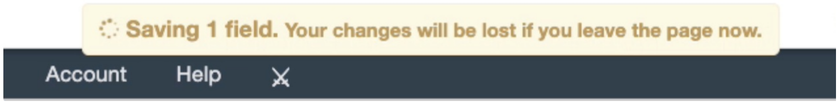
- Persistent forms automatically **pull data from the most recently locked note** into future appointments.

- ☑ **Use for:** Unchanging patient information (family history, social history)
- ✕ **Don't use for:** Visit-specific information

To reuse visit-specific data: Use "Copy Previous Note" instead and select which forms and dates you want.



Wait for Auto-Save



A save notification appears when you make changes. Wait until it disappears before:

- Switching to another DrChrono tab (Calendar, Form Builder, etc.)
- Opening another form in the same appointment

Moving too quickly can cause data loss.

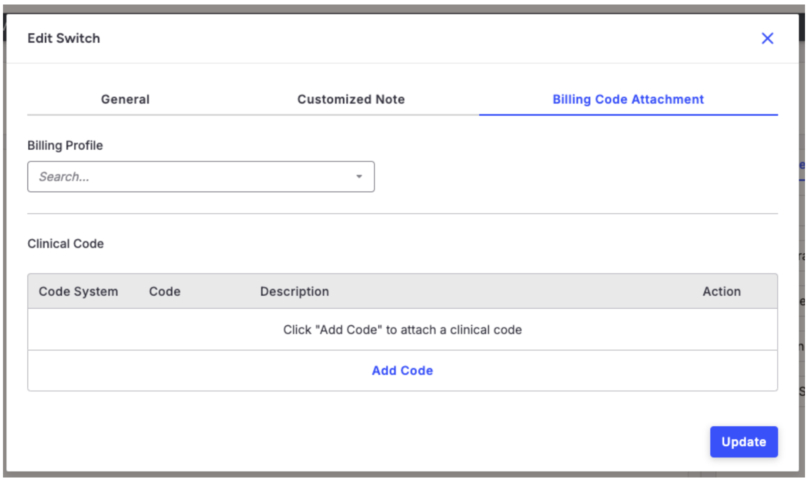
For example, if you turn a toggle switch on with billing codes linked and toggle to the billing section within the clinical note before the autosave notification has disappeared, the linked billing codes may not appear in the billing section as expected until the save process has been completed.

Billing Codes Best Practice

When adding billing information to a field, choose **one** of these options:

- Billing profiles (allows modifiers)
- Individual clinical codes (no modifiers)

Don't use both on the same field—this can cause billing errors.



Archiving Form

Learn more about steps to Archive and Restore a Form.

Archive a Form

- Go to **Clinical > Clinical Form Management**
- Click the **archive icon** next to the form
- If the form is used in any unlocked notes, you'll see a notification

View Archived Forms

1. Go to **Clinical > Archive (beta)**
2. Search for archived forms
3. You can unarchive forms if needed

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.

> You cannot fully archive a form that's still being used in unlocked clinical notes..

Sharing Forms

Share a Form

1. Go to **Clinical > Clinical Form Management**
2. Click the **three-dot menu** (...) next to the form
3. Click **Share**

Choose How to Share

- **Upload to Library** – Makes the form available to others in the shared Form Library
- **Send as Email** – Email the form as an attachment