Clinical Form Management

Last modified on 03/04/2025 10:30 am EST

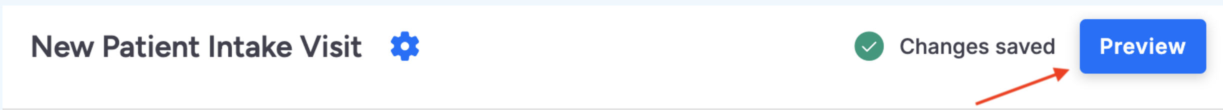
The form builder has a new look. This version has a new design and enhanced features to provide an easier workflow when creating custom templates. The existing form builder remains functional and runs parallel to the new version.

To start, navigate to Clinical > Clinical Form Management.

Clinical Form Management is currently only available on Google Chrome.

A new update allows users to preview forms while building or editing them, eliminating the need to exit the application and access an existing appointment. This feature is currently in beta, please contact customer support to enable it.

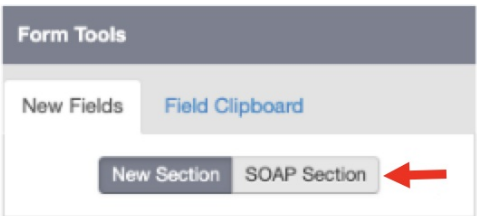
Feature flag name (internal use only): react_form_builder_preview



Removed features

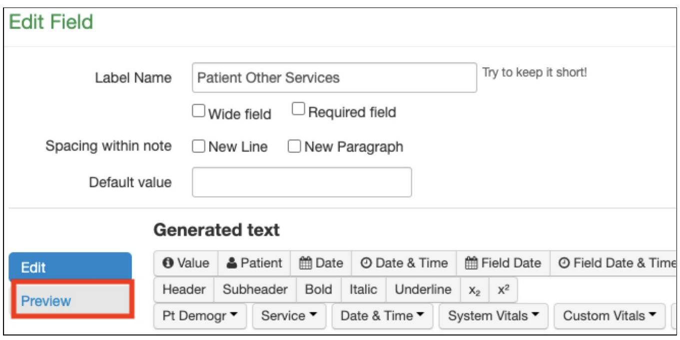
SOAP Section

SOAP Section was previously located within the **Additional** tab under **Form Tools > New Fields**.



Preview field

The **Preview** field was previously located within the individual tool when editing.



New features

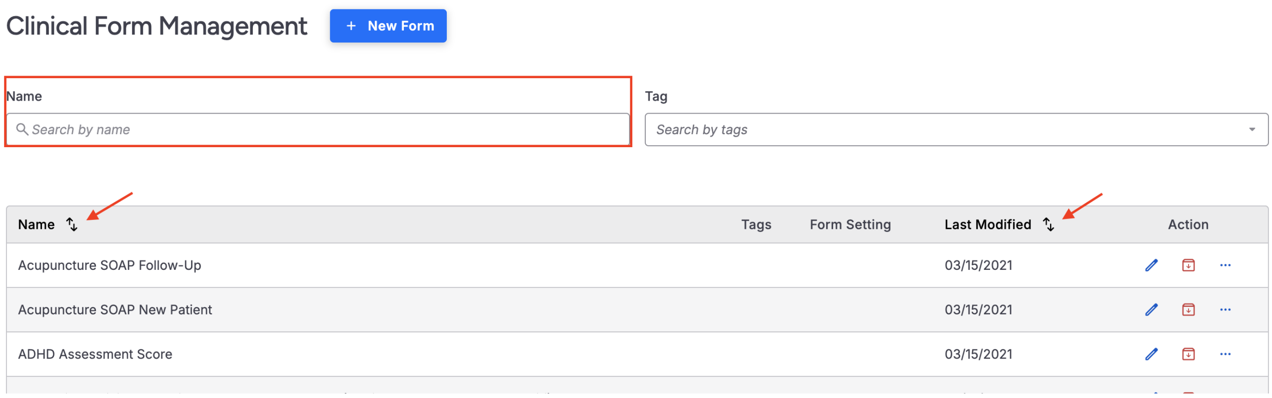
You can use the following new features while building a new custom form.

- Form Type
- Form Archive Tool

Search existing forms

Name column

The new design lists preset and additional forms alphabetically under the **Name** column. Select the up/down arrows to reorder the list or enter the label name in the search box.

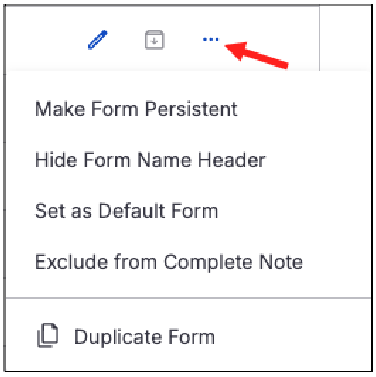


Last Modified column

Select the up/down arrows to sort forms by the most recent edit.

Action column

In the Action column, you can edit the form , archive the form , or select **Options** ... to open the menu.



Only one form may be set as the default form.

Custom form best practices

To maximize the use of **Clinical Notes**, the following best practices are recommended when creating a form.

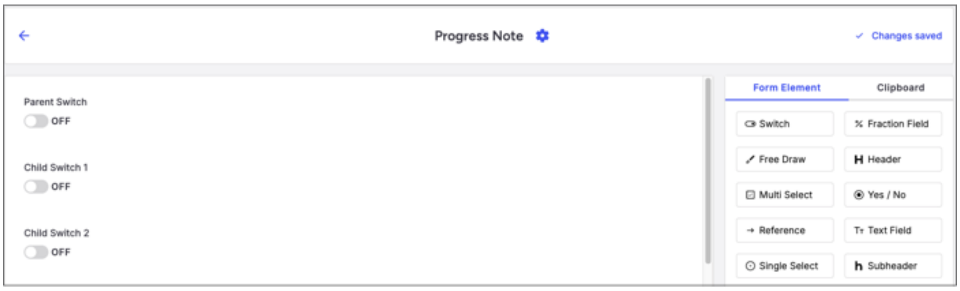
Build small forms

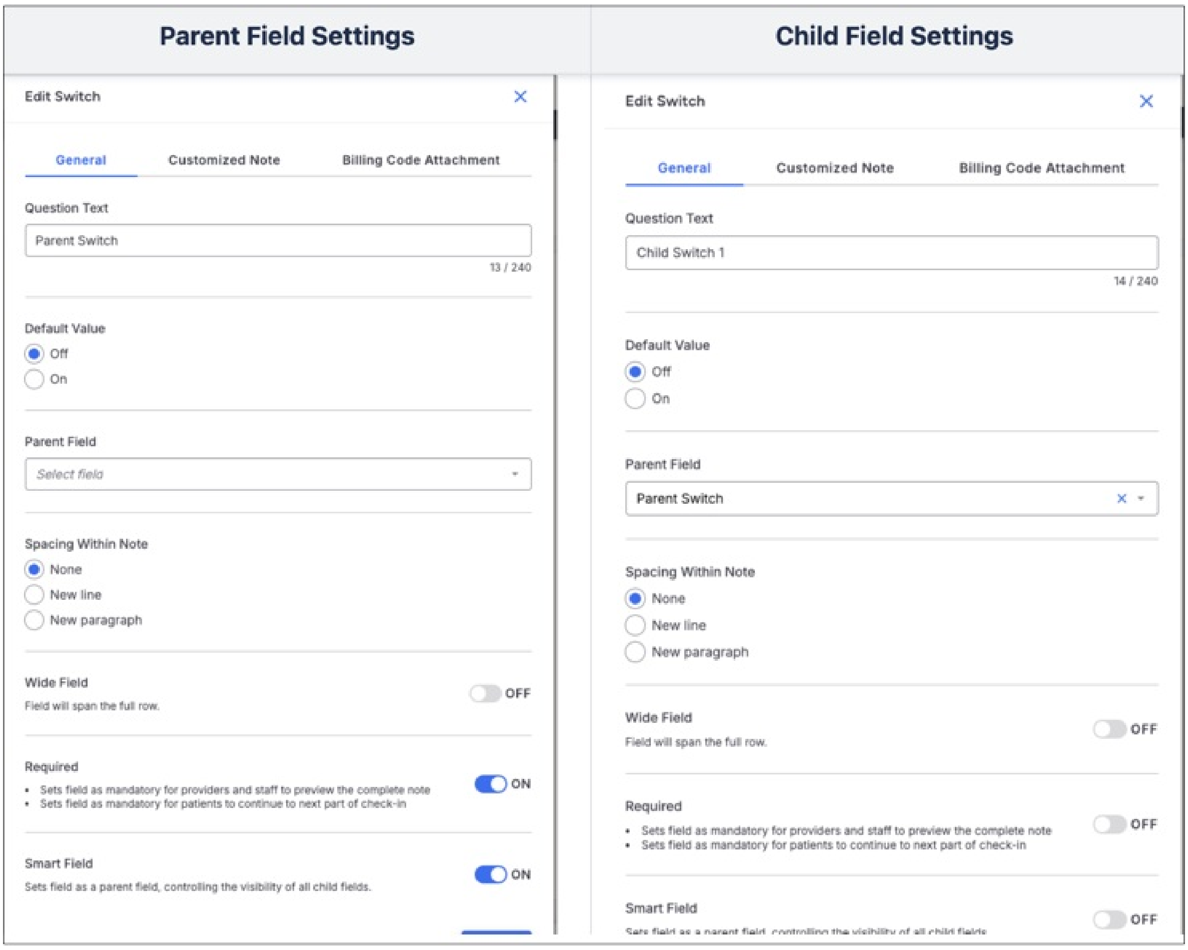
The larger the form, the greater the risk of encountering timeout issues when loading, saving changes, previewing, unlocking, or signing and locking their clinical notes. To minimize these risks, it's best to design forms according to the following guidelines:

- Use a maximum of 55 sub-fields per smart field
- Maintain an overall total of less than 200 fields per form

Smart fields

- When the smart field toggle is turned on for a field, other fields can be designated as child fields of that parent field.
- To set a field as a child field, you must select the name of the parent field in the parent field dropdown.
- If the parent field is turned on in the clinical note edit screen, the child fields load into the clinical note edit screen.





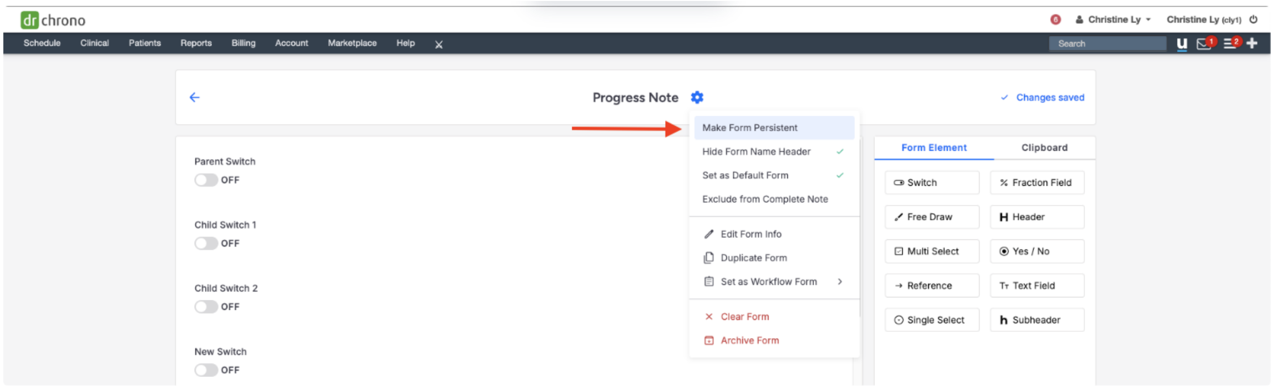
Set forms to be persistent for person-level data only

An example of person-level data is social or family history information, such as the patient's father being diagnosed with type 2 diabetes.

Forms for clinical notes should only be set to persistent if they are intended to document person-level data. This type of data should be independent of specific encounters and should not require edits or changes after each appointment.

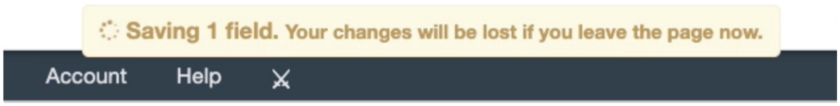
Persistent forms copy the most recently locked clinical note data within a form field so that the next appointment displays the previously inputted information automatically.

If you want to copy non-person-level data, select **Copy Previous Note** and then select the desired forms and the appointment date of service. An example of when to use the **Copy Previous Note** functionality is when you want to copy previously entered values for the current appointment from an appointment that took place a year ago for the patient.



Allow the save process to complete

Each time a clinical note form field is edited, a notification appears indicating that an autosave process has been initiated. Before navigating to another tab within the DrChrono platform or switching to a different tab/form in the clinical note, wait for the autosave notification to disappear. This indicates that the save process is complete.



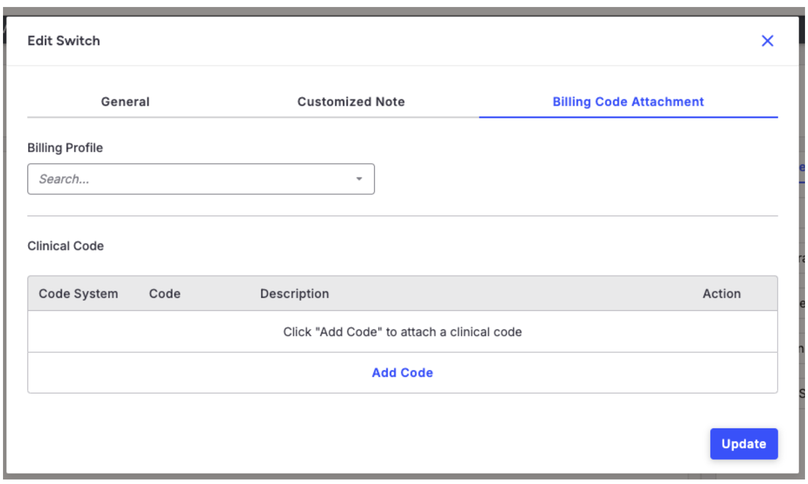
If the autosave notification is still on the screen and you:

- Navigate to another tab within the DrChrono platform (for example, **Calendar**, **Form Builder**), there will be data loss.
- Toggle to another form within the same appointment, the data within this clinical note may potentially be out of sync.

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 fields

When building forms, link either billing profiles or individual clinical codes to form fields, but not both. Linking billing profiles allows for modifiers to be added to the billing codes. In contrast, clinical codes added individually to a form field do not provide the option to include modifiers.



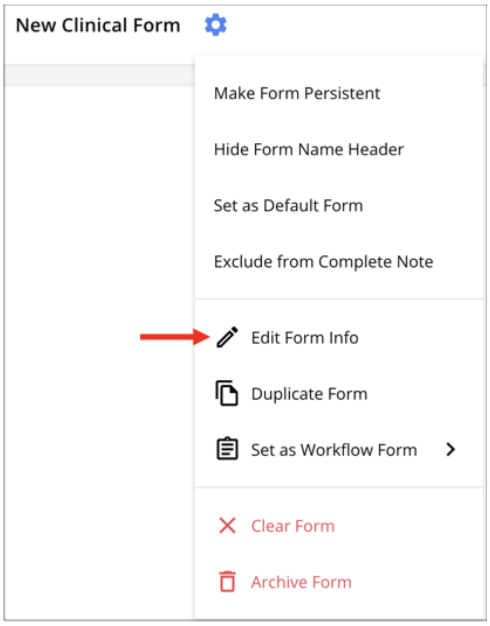
Build the custom form

Updates and changes autosave while you build the form.

1. Select **New Form**.

   Like the old version, your blank form appears in the middle canvas screen.

2. To label the form, select **Options** and select **Edit Form Info.**



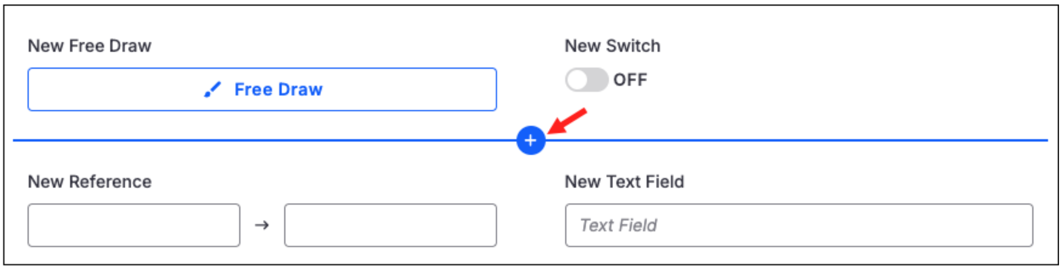
3. Enter the form name and then select **Update**.
   Once a label has been created, you can build your custom form. In this new version, you can drag and drop the field tools (in the **Form Element** tab) into the form.

4. Select a field tool and drag it to an **Add Here** box.

Additional features

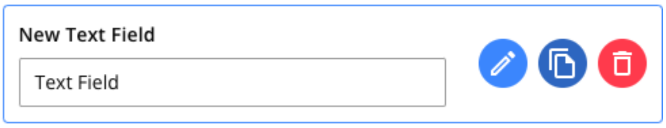
Add field rows

To add a field row, hover between the two field rows and select the plus icon .



Manage field boxes

You can edit the field box , copy the field to the clipboard , or remove the field . Hover over the field box to show these icons.



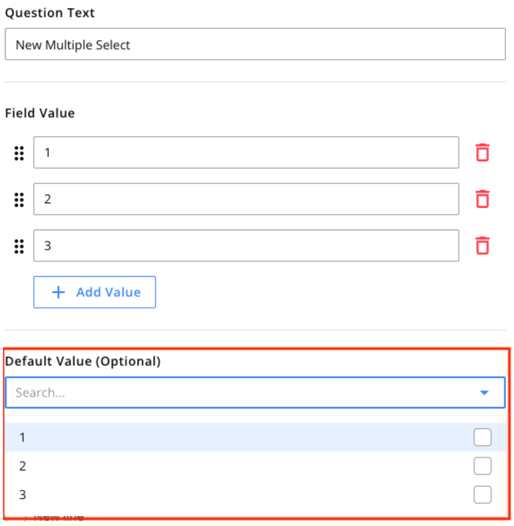
Editing the field tool - there are three tabs within this field (General, Customized Note, and Billing Code Attachment).

*General - label your field, add spacing and/or field width and field requirements.

*Customized Note - create a generated text using the variables (i.e. value).

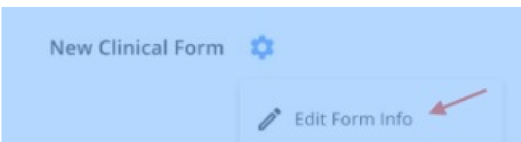
*Billing Code Attachment - attach a single billing profile.

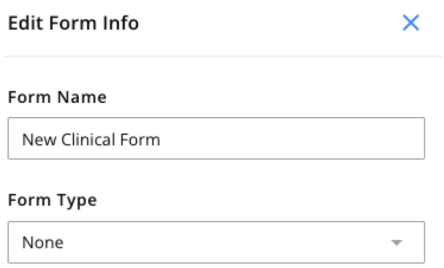
- Single/Multiple Select - the new version provides a Default Value dropdown option to choose from.



- Form Type - routes specific information to certain parts of the CCDA file when sending patient data to registries or referring patients out.

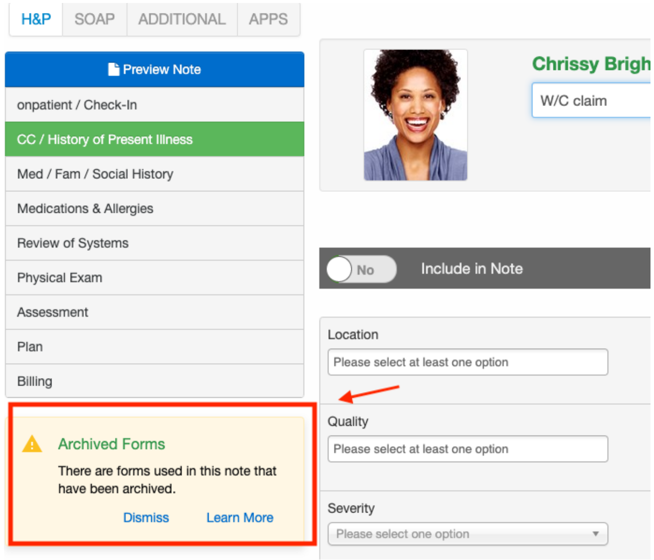
  Users are not able to create a form type. The form types are preset within DrChrono and are based on HL7 standards for clinical note types.





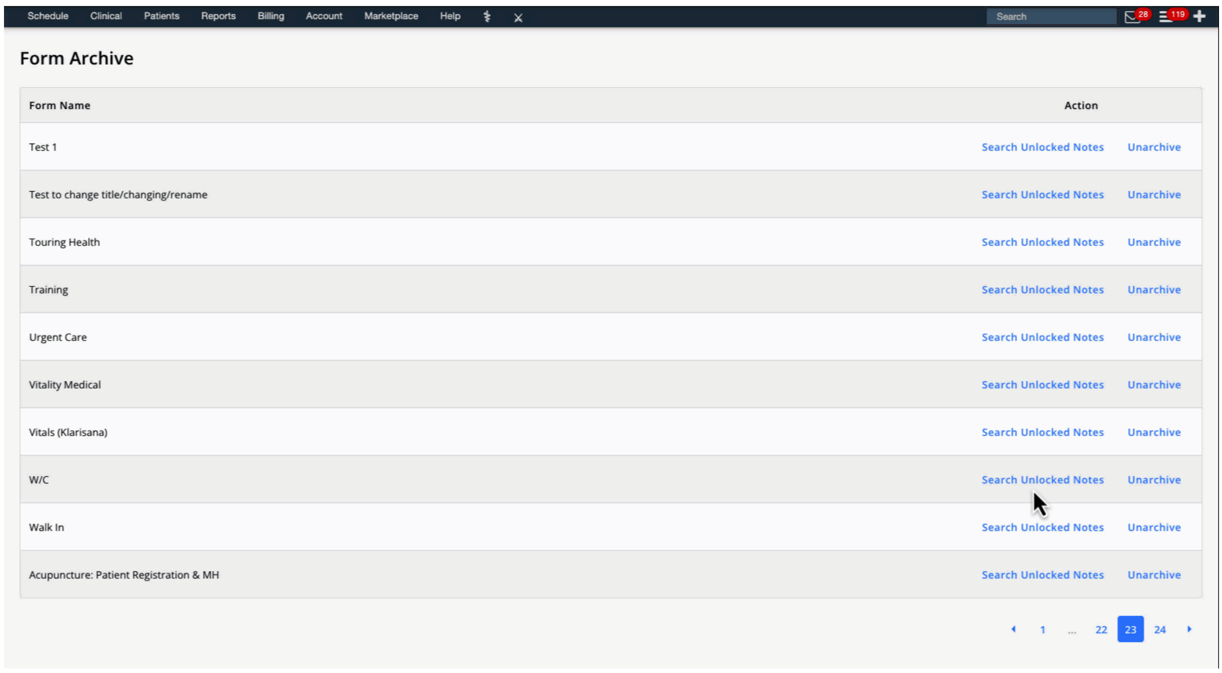
Form Archive Tool

A pop-up notification appears if the form that is selected to be archived is associated with an unlocked clinical note.



To view archived forms with associated unlocked clinical notes, go to **Clinical > Archive (beta)**.

You can locate the form and either search for unlocked notes or unarchive the form.



Sharing and Emailing Forms

Forms can be shared to the form library or emailed via the share option.

From the form management screen

- Navigate to the (...) under the actions column
- Click share
- Choose upload to library or send as email