

# Clinical Form Management

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Beginning in **January 2026**, we will start retiring the legacy Form Builder. [Learn more about this update.](#)

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.

<a href="#">Existing forms</a>	<a href="#">Create a custom form</a>
<a href="#">Custom form best practices</a>	<a href="#">Preview form</a>
<a href="#">Archive form</a>	<a href="#">Share form</a>






## Searching and Managing Existing Forms

Clinical Form Management

[+ New Form](#)

Name

Tag

Name 	Tags	Form Setting	Last Modified 	Action
Acupuncture SOAP Follow-Up	<a href="#">New Patient Intake Form</a>		07/11/2023	  

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.

- Navigate to Clinical Form Management
  - Go to **Clinical > Clinical Form Management** to begin building a new custom form.
- Create a New Form
  - Select **New Form**.
  - A blank form will appear in the center canvas.

- 
- 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

- Add Form Elements
  - Open the **Form Elements** tab.
  - Drag and drop desired field tools into the **Add Here** sections of the form.
- Add Field Rows
  - Hover between two field rows.
  - Click the **plus (+) icon** to insert a new field row.
- Manage Field Boxes
  - Hover over any field box to reveal quick action icons:
    - **Edit** the field
    - **Copy** the field to clipboard
    - **Delete** the field

## Character Count for Single & Multi-Select Form Fields

A character counter appears below each answer option in single select and multi-select form fields. The counter updates in real time as you type, showing the number of characters used out of the 950-character limit (for example: 125/950).

Each option is limited to **950 characters** to ensure consistent formatting.

If you exceed this limit:

- The field is outlined in red.
- An error message appears: *"Please adjust field value to be 950 characters or less."*
- You won't be able to save the form until all options meet the character limit.

## 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.

Edit Free Draw

General

Code Attachment

Question Text

Test Free Draw

14 / 240

Background Image

No file selected

Select File

Select Image Size

Select Free Draw image size from the preview below,

☐ Actual Size


☒ Extra Small

☐ Small

☐ Medium

☐ Large

☐ Extra Large



450×600

## 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

The **Text Editor** allows you to format and style text when filling out or editing clinical forms. This makes it easier to organize information clearly and highlight important details.

You can use the text editor to:

- **Change the text style**

Choose from different text styles to organize your content:

- **Normal text** – Standard body text for regular information.
- **Heading** – Use for main titles or section headings.
- **Subheading** – Use for secondary headings or sub-sections.

- **Apply text formatting**

Add emphasis or structure to your text with the following options:

- **Bold** – Make text darker to highlight important words or phrases.
- **Italics** – Tilt text for emphasis or for terms such as medical names.
- **Underline** – Draw a line under text to draw attention.
- **Subscript** – Display small text slightly below the line (useful for chemical formulas, e.g., H<sub>2</sub>O).
- **Superscript** – Display small text slightly above the line (useful for notations, e.g., cm<sup>2</sup>).

## How to Use

- Select the text you want to format.
- Click the **Text Editor Toolbar** at the top of the form.
- Choose your desired style or formatting option.
- The selected text will update immediately with the chosen formatting.



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

## 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.

### Managing Form Size

The Clinical Form Management tool includes warnings to help maintain optimal form performance,.

#### Key Features

- **Field Count Display:** A live field counter appears at the bottom of the form builder showing your current field count out of the recommended maximum of 55 fields.
- **Performance Warning Banner:** When a form exceeds 55 fields, a warning banner appears at the top alerting you about potential performance impacts.
- **Legacy Form Alerts:** Existing forms that exceed the recommended limit display warnings indicating they may not load as expected.

#### Best Practices

- 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

### 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.

Progress Note ⚙️ ✓ Changes saved

Parent Switch ☐ OFF

Child Switch 1 ☐ OFF

Child Switch 2 ☐ OFF

**Form Element** **Clipboard**

- Switch
- Free Draw
- Multi Select
- Reference
- Single Select
- Fraction Field
- Header
- Yes / No
- Text Field
- Subheader

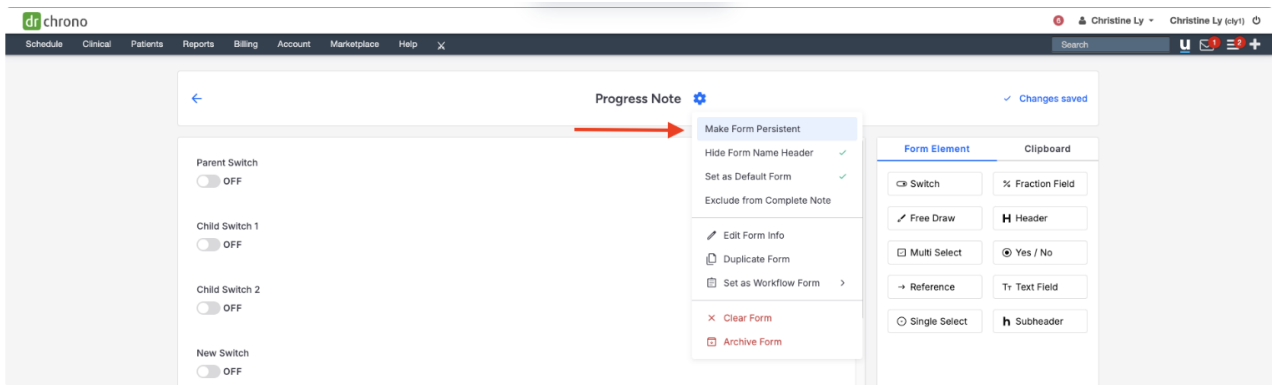
Parent Field Settings	Child Field Settings
<p><b>Edit Switch</b> <span>✕</span></p> <p><b>General</b>   Customized Note   Billing Code Attachment</p> <p>Question Text</p> <p>Parent Switch <span>13 / 240</span></p> <p>Default Value</p> <p><input checked="" type="radio"/> Off <input type="radio"/> On</p> <p>Parent Field</p> <p>Select field</p> <p>Spacing Within Note</p> <p><input checked="" type="radio"/> None <input type="radio"/> New line <input type="radio"/> New paragraph</p> <p>Wide Field <input type="checkbox"/> OFF</p> <p>Field will span the full row.</p> <p>Required <input checked="" type="checkbox"/> ON</p> <ul style="list-style-type: none"> <li>Sets field as mandatory for providers and staff to preview the complete note</li> <li>Sets field as mandatory for patients to continue to next part of check-in</li> </ul> <p>Smart Field <input checked="" type="checkbox"/> ON</p> <p>Sets field as a parent field, controlling the visibility of all child fields.</p>	<p><b>Edit Switch</b> <span>✕</span></p> <p><b>General</b>   Customized Note   Billing Code Attachment</p> <p>Question Text</p> <p>Child Switch 1 <span>14 / 240</span></p> <p>Default Value</p> <p><input checked="" type="radio"/> Off <input type="radio"/> On</p> <p>Parent Field</p> <p>Parent Switch <span>✕</span></p> <p>Spacing Within Note</p> <p><input checked="" type="radio"/> None <input type="radio"/> New line <input type="radio"/> New paragraph</p> <p>Wide Field <input type="checkbox"/> OFF</p> <p>Field will span the full row.</p> <p>Required <input type="checkbox"/> OFF</p> <ul style="list-style-type: none"> <li>Sets field as mandatory for providers and staff to preview the complete note</li> <li>Sets field as mandatory for patients to continue to next part of check-in</li> </ul> <p>Smart Field <input type="checkbox"/> OFF</p> <p>Sets field as a parent field, controlling the visibility of all child fields.</p>

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

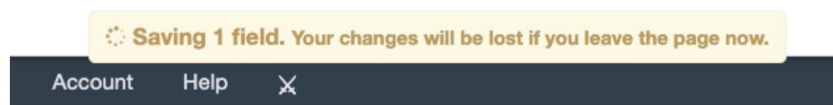
Use persistent forms only for static, **person-level data** that should carry forward across visits.

**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.

Edit Switch

General

Customized Note

Billing Code Attachment

Billing Profile

Search...

Clinical Code

Code System	Code	Description	Action
Click "Add Code" to attach a clinical code			
Add Code			

Update

## 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.

[←](#)H&P CC / History of Present Illness[⚙️](#)[Preview](#)

The screenshot shows the DrChrono interface for the 'H&P CC / History of Present Illness' form. The interface is divided into two main sections: a form builder on the left and a clinical note preview on the right. The form builder includes fields for Location (medial), Quality (aching, burning), Severity (10 out of 10), Duration, Onset / Timing, Context, Modifying Factors, and Associated Symptoms, each with a corresponding comments field. The clinical note preview shows a patient summary and the history of present illness text: 'The quality of pain is described as aching, burning and a severity / intensity level of 10 out of 10 The patient complains of the pain being unbearable.' The interface is powered by DrChrono and includes a footer with release information and navigation links.

## 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.

Name 	Tags	Form Setting	Last Modified 	Action
Acupuncture SOAP Follow-Up			03/15/2021	  
Acupuncture SOAP New Patient			03/15/2021	Make Form Persistent
ADHD Assessment Score			03/15/2021	Hide Form Name Header
Aesthetic Medicine: Chemical Peel Treatment Record(Copied From Adaeze Nwanonyiri)			03/15/2021	Set as Default Form
Aesthetic Medicine: Injection and Botox(Copied From Adaeze Nwanonyiri)			03/15/2021	Exclude from Complete Note
Ankle Examination			03/15/2021	 Share 
Billing Codes			03/15/2021	 Duplicate Form
				 Set as Workflow Form 