

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.

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

Finding and Managing Your Forms

Clinical Form Management [+ New Form](#)

Name

Tag

Name	Tags	Form Setting	Last Modified	Action
Acupuncture SOAP Follow-Up	New Patient Intake Form		07/11/2023	

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:

1. **Edit** a form
2. **Archive** a form
3. **Options menu** (three dots) for more actions

Make Form Persistent

Hide Form Name Header

Set as Default Form

Exclude from Complete Note

 Share >

 Duplicate Form

 Set as Workflow Form >

- **Make Form Persistent** – Keeps the form continuously visible and available within a note or record, rather than collapsing or disappearing after submission.
- **Hide Form Name Header**
 - Removes the form's title/name from displaying at the top of the form when viewed by users.
- **Set as Default Form** – Designates this form as the one that automatically loads first when creating a new entry in this category or context.
- **Exclude from Complete Note** – Prevents this form's fields and data from being included when a full/compiled note is generated or exported.
- **Share** – Provides options to share the form with other users or external parties, with a submenu for sharing method selection.
- **Duplicate Form** – Creates an exact copy of the form, allowing you to use it as a template or make variations without rebuilding from scratch.
- **Set as Workflow Form** – Assigns the form to a specific workflow, enabling it to trigger or participate in automated sequences or multi-step processes.



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

Editing Forms with USCDI v3 Fields

Unsupported Field Found ✕

The selected form has one of the following fields: Clinical Test & Result, Planned Procedure, Pregnancy Status, Pregnancy Intent, or Smoking Status.

You can only edit this form in Clinical Form Management. Click "Continue" to open this form in Clinical Form Management.

Cancel Continue

When opening forms that contain **USCDI v3** fields in the **Legacy Form Builder**, you will now see a pop-up message instead of an error.

This message will appear if the form includes any of the following fields:

- Clinical Test & Result
- Planned Procedure
- Pregnancy Status
- Pregnancy Intent
- Smoking Status

You will have two options:

Continue – You will be redirected to the Clinical Form Management screen, where the selected form will automatically open and be ready for editing.

Cancel – The pop-up will close and you will remain on the Legacy Form Builder screen. The form will not open, but you can select another form to edit.



Forms containing any USCDI v3 fields cannot be opened or edited in the Legacy Form Builder.

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

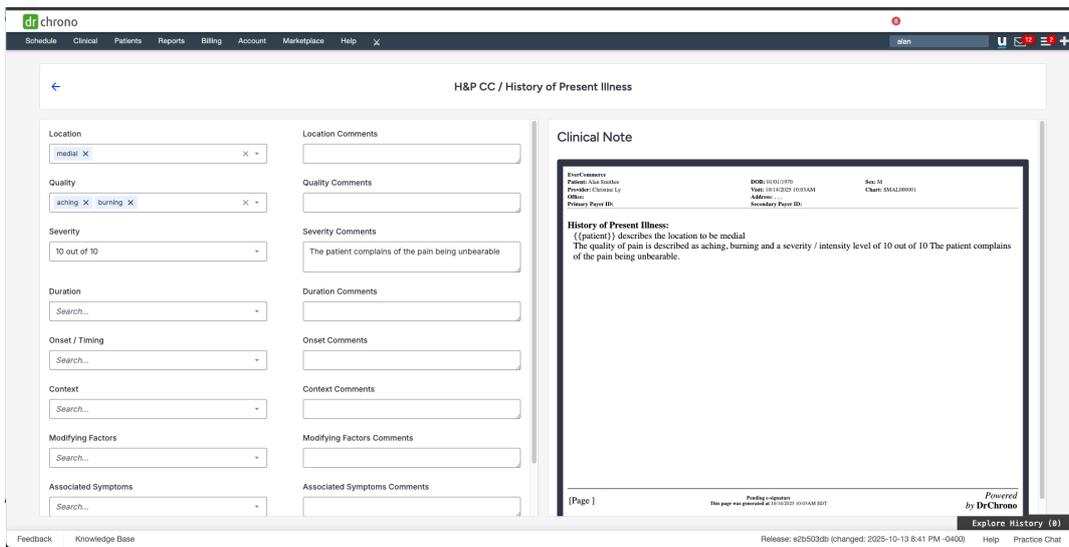
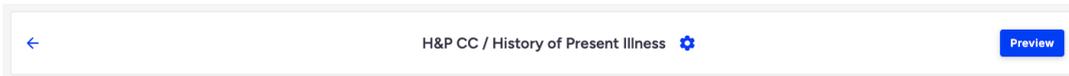
Edit or Remove Fields

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

Editing Field Properties

Each form field includes three tabs:

General

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

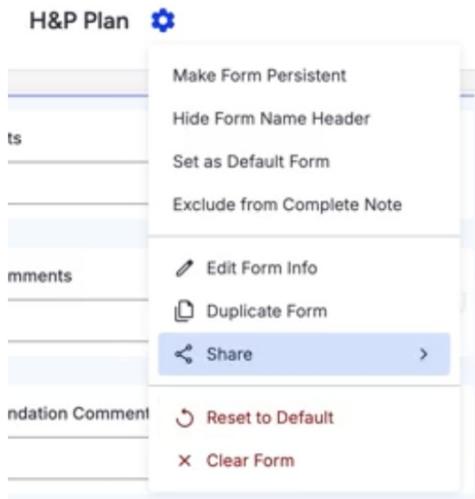
Customized Note

- 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.

Editing a Form



Make Form Persistent, Hide Form Name Header, Set as Default Form, Exclude from Complete Note, Duplicate Form, Set as Workflow Form, and Share — are the same as described in [this section](#).

Edit Form Info — Opens the form's settings to modify its name, description, or other configuration details.

Clear Form — Erases all data currently entered in the form, resetting it to a blank state without deleting the form itself. (Displayed in red to indicate it is a destructive action.)

Archive Form — Removes the form from active use and stores it for historical reference, keeping the data intact but hiding it from regular workflows. (Displayed in red to indicate it is a destructive action.)

Reset to Default — Restores the form's settings and/or field values back to their original default configuration, undoing any customizations or changes that have been made.

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.

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.

Edit Free Draw [X]

General | **Code Attachment**

Question Text
Test Free Draw
14 / 240

Background Image
No file selected
[Select File] [Circular Arrow]

Select Image Size
Select Free Draw image size from the preview below,
 Actual Size
 Extra Small
 Small
 Medium
 Large
 Extra Large

450x600

Text Editor Feature

Edit Text Field [X]

General | **Customized Note** | **Code Attachment**

Generated text
Normal Text [B] [I] [U] [X] [X'] [+ Generated Text]

Value
Question Text
Patient Info >
Presets >
Date & Time >
System Vitals >
Custom Vitals >

[Update]

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 (H₂O)
- Superscript – for notations (cm²)

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.

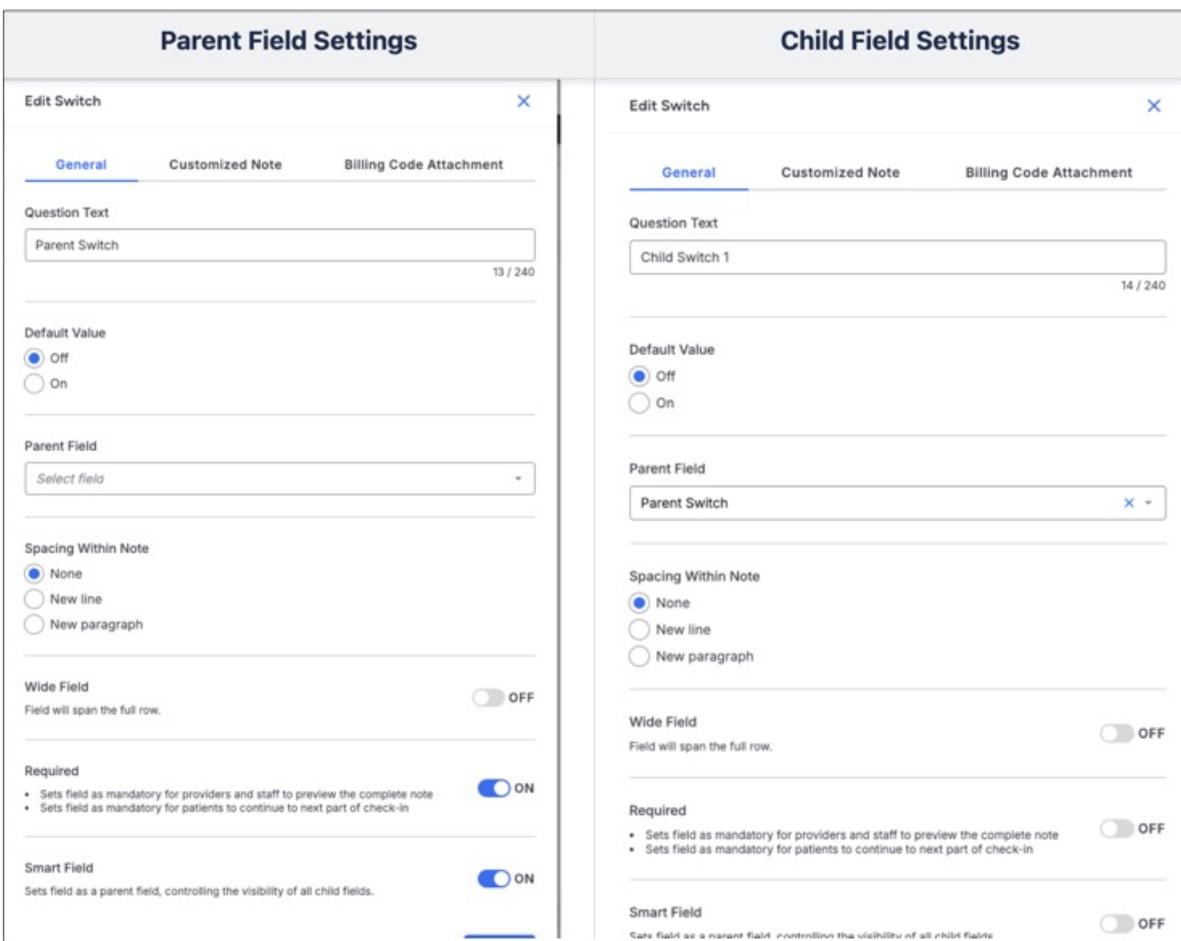
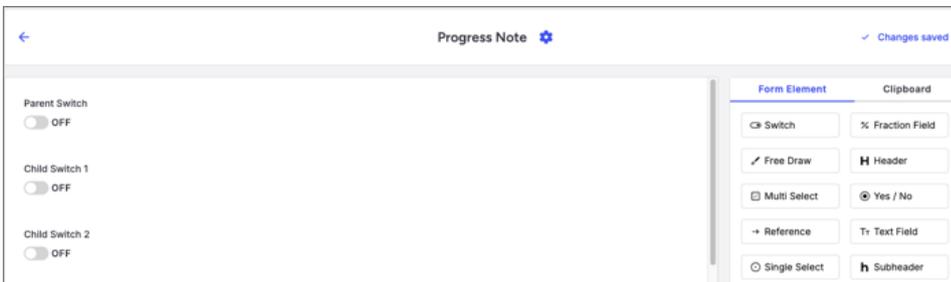
Managing Form Size

- 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.



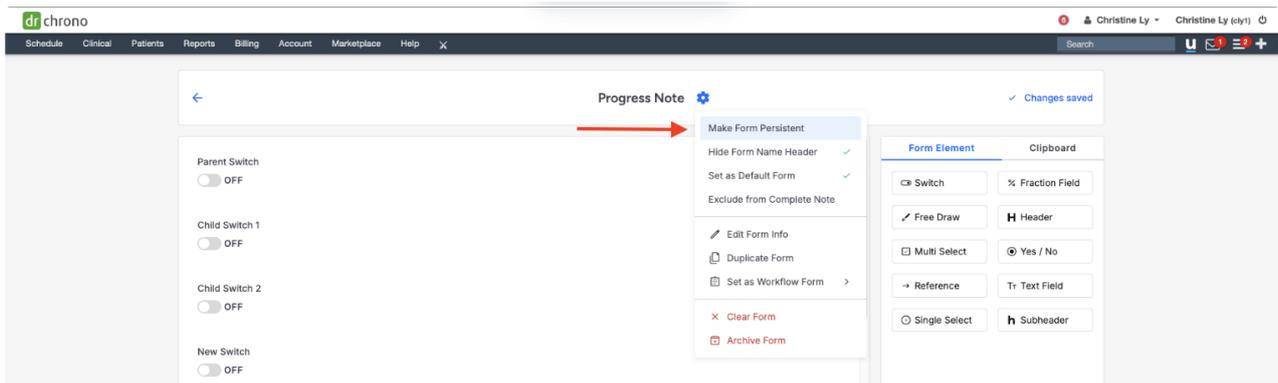
Set Forms to Be Persistent *Only* for Person-Level Data

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

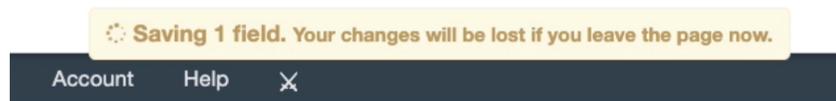
Examples: Family history, social history (e.g., “Father has Type 2 Diabetes”)

- 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.

Edit Switch
✕

General
Customized Note
Billing Code Attachment

Billing Profile

Clinical Code

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

Update

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

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	<div data-bbox="991 383 1203 465" style="border: 1px solid #ccc; padding: 2px;"> Upload to Library Send as Email </div> <div data-bbox="1203 383 1441 490" style="border: 1px solid #ccc; padding: 2px;"> <div data-bbox="1220 383 1433 421" style="border: 2px solid red; padding: 2px;">  Share > </div> <div data-bbox="1220 421 1433 450" style="padding: 2px;">  Duplicate Form </div> <div data-bbox="1220 450 1433 479" style="padding: 2px;">  Set as Workflow Form > </div> </div>
Billing Codes			03/15/2021	