

Clinical Form Management

Last modified on 12/13/2024 4:12 pm 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](#).

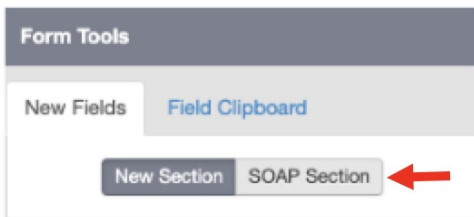


Clinical Form Management is currently only available on Google Chrome.

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.

The screenshot shows the 'Edit Field' interface. It includes a 'Label Name' field with the text 'Patient Other Services' and a note 'Try to keep it short!'. There are checkboxes for 'Wide field' and 'Required field', and 'Spacing within note' options for 'New Line' and 'New Paragraph'. A 'Default value' field is also present. Below these is a 'Generated text' section with a toolbar containing buttons for 'Value', 'Patient', 'Date', 'Date & Time', 'Field Date', and 'Field Date & Time'. The 'Preview' button is highlighted with a red box.


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.

Clinical Form Management + New Form

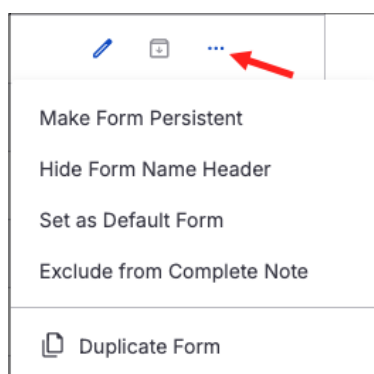
Name 	Tags	Form Setting	Last Modified 	Action
Acupuncture SOAP Follow-Up			03/15/2021	  
Acupuncture SOAP New Patient			03/15/2021	  
ADHD Assessment Score			03/15/2021	  

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.

The screenshot shows the 'Progress Note' edit screen. On the left, there are three toggle switches: 'Parent Switch' (OFF), 'Child Switch 1' (OFF), and 'Child Switch 2' (OFF). On the right, there is a 'Form Element' and 'Clipboard' panel. The 'Form Element' panel includes: Switch, Free Draw, Multi Select, Reference, and Single Select. The 'Clipboard' panel includes: Fraction Field, Header, Yes / No, Text Field, and Subheader.

The image compares 'Parent Field Settings' and 'Child Field Settings' side-by-side. Both screens have tabs for 'General', 'Customized Note', and 'Billing Code Attachment'.
Parent Field Settings:
- Question Text: Parent Switch (13 / 240)
- Default Value: Off (selected), On
- Parent Field: Select field
- Spacing Within Note: None (selected), New line, New paragraph
- Wide Field: OFF
- Required: ON
- Smart Field: ON (Sets field as a parent field, controlling the visibility of all child fields.)
Child Field Settings:
- Question Text: Child Switch 1 (14 / 240)
- Default Value: Off (selected), On
- Parent Field: Parent Switch
- Spacing Within Note: None (selected), New line, New paragraph
- Wide Field: OFF
- Required: OFF
- Smart Field: OFF (Sets field as a parent field, controlling the visibility of all child fields.)

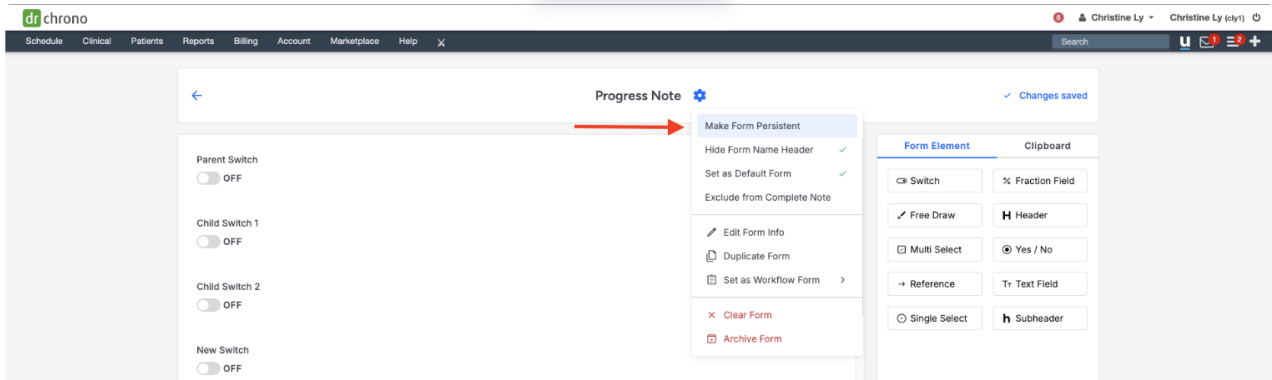
Set forms to be persistent for person-level data only

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.

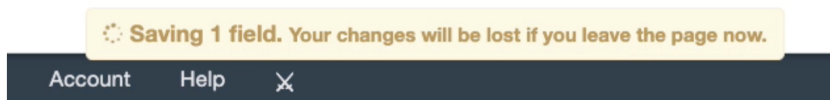
Persistent forms copy the most recently locked clinical note data within a form field so that the next appointment displays the previously inputted information automatically.

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.

Edit Switch [X]

General Customized Note **Billing Code Attachment**

Billing Profile

Search... [v]

Clinical Code

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

Update


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**.

New Clinical Form 

- Make Form Persistent
- Hide Form Name Header
- Set as Default Form
- Exclude from Complete Note
-  **Edit Form Info**
-  Duplicate Form
-  Set as Workflow Form >
-  Clear Form
-  Archive Form

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.

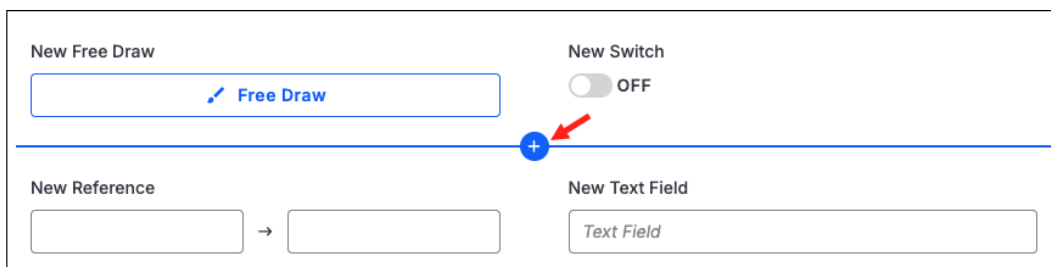
4. Select a field tool and drag it to an **Add Here** box.






Additional features

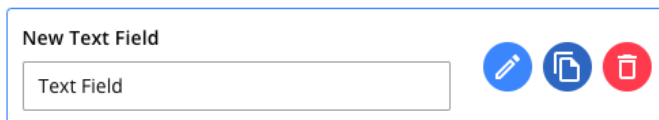
Add field rows

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.

Question Text

Field Value

⋮

🗑

⋮

🗑

⋮

🗑

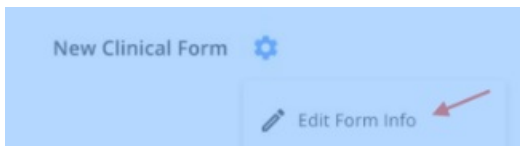
+ Add Value

Default Value (Optional)

Search... ▼

1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input type="checkbox"/>

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



Edit Form Info ✕

Form Name

Form Type

Form Archive Tool

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

H&P
SOAP
ADDITIONAL
APPS

Preview Note

- onpatient / Check-In
- CC / History of Present Illness
- Med / Fam / Social History
- Medications & Allergies
- Review of Systems
- Physical Exam
- Assessment
- Plan
- Billing

Chrissy Brigh

W/C claim

No Include in Note

Location

Quality

Severity

⚠ Archived Forms

There are forms used in this note that have been archived.

[Dismiss](#)
[Learn More](#)

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.

Form Name	Action
Test 1	Search Unlocked Notes Unarchive
Test to change title/changing/rename	Search Unlocked Notes Unarchive
Touring Health	Search Unlocked Notes Unarchive
Training	Search Unlocked Notes Unarchive
Urgent Care	Search Unlocked Notes Unarchive
Vitality Medical	Search Unlocked Notes Unarchive
Vitals (Klarisana)	Search Unlocked Notes Unarchive
W/C	Search Unlocked Notes Unarchive
Walk In	Search Unlocked Notes Unarchive
Acupuncture: Patient Registration & MH	Search Unlocked Notes Unarchive

1 ... 22 23 24

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

Name	Tags	Form Setting	Last Modified	Action
Acupuncture SOAP Follow-Up			03/15/2021	Edit Delete ...
Acupuncture SOAP New Patient			03/15/2021	<ul style="list-style-type: none"> Make Form Persistent Hide Form Name Header Set as Default Form Exclude from Complete Note
ADHD Assessment Score			03/15/2021	
Aesthetic Medicine: Chemical Peel Treatment Record(Copied From Adaeze Nwanonyiri)			03/15/2021	
Aesthetic Medicine: Injection and Botox(Copied From Adaeze Nwanonyiri)			03/15/2021	<ul style="list-style-type: none"> Upload to Library Send as Email
Ankle Examination				<ul style="list-style-type: none"> Share Duplicate Form Set as Workflow Form
Billing Codes			03/15/2021	