

Clinical Form Management

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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

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:

- **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

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

Understanding Field Settings

General Tab

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

Customized Note Tab

Character Count for Single & Multi-Select Form Fields

- 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

- 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

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 CCD 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 (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.

The screenshot displays the 'Progress Note' form builder interface. On the left, there is a list of fields: 'Parent Switch' (OFF), 'Child Switch 1' (OFF), and 'Child Switch 2' (OFF). On the right, there is a 'Form Element' panel with a grid of field types: Switch, Free Draw, Multi Select, Reference, Single Select, Fraction Field, Header, Yes / No, Text Field, and Subheader. A 'Clipboard' panel is also visible on the far right.

Parent Field Settings

Edit Switch

General

Customized Note

Billing Code Attachment

Question Text

Parent Switch

13 / 240

Default Value

Off

On

Parent Field

Select field

Spacing Within Note

None

New line

New paragraph

Wide Field

Field will span the full row.

OFF

Required

Sets field as mandatory for providers and staff to preview the complete note

Sets field as mandatory for patients to continue to next part of check-in

ON

Smart Field

Sets field as a parent field, controlling the visibility of all child fields.

ON

Child Field Settings

Edit Switch

General

Customized Note

Billing Code Attachment

Question Text

Child Switch 1

14 / 240

Default Value

Off

On

Parent Field

Parent Switch

Spacing Within Note

None

New line

New paragraph

Wide Field

Field will span the full row.

OFF

Required

Sets field as mandatory for providers and staff to preview the complete note

Sets field as mandatory for patients to continue to next part of check-in

OFF

Smart Field

Sets field as a parent field, controlling the visibility of all child fields.

OFF

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

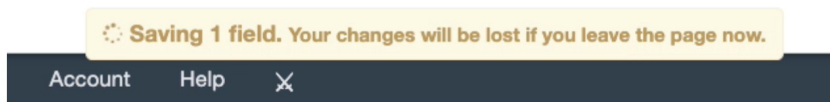
To reuse visit-specific data: Use "Copy Previous Note" instead and select which forms and dates you want.

The screenshot shows the drchrono interface for configuring a 'Progress Note' form. A red arrow points to the 'Make Form Persistent' dropdown menu. The menu options are:

- 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

The 'Form Element' and 'Clipboard' panels are also visible on the right.

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.

A screenshot of the "Edit Switch" dialog box in DrChrono. The dialog has a title bar "Edit Switch" with a close button (X). It features three tabs: "General", "Customized Note", and "Billing Code Attachment", with the third tab selected. Under the "Billing Code Attachment" tab, there is a "Billing Profile" section with a search dropdown menu. Below that is a "Clinical Code" section containing a table with columns "Code System", "Code", "Description", and "Action". The table is currently empty, with a message "Click 'Add Code' to attach a clinical code" and a blue "Add Code" link. At the bottom right of the dialog is a blue "Update" button.

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	Share >
Billing Codes			03/15/2021	Upload to Library
				Send as Email
				Duplicate Form
				Set as Workflow Form >

