

Form Builder (Beta)

Last modified on 10/21/2024 3:54 pm EDT

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 open the **Form Builder** (beta version), select **Clinical > Form Builder (beta)**.

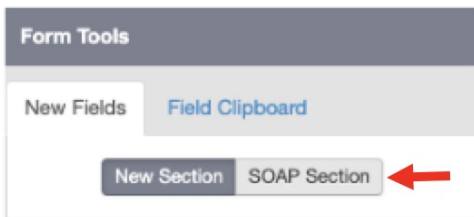


Form Builder (beta) is currently only available on Google Chrome.

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' dialog box. It has a title bar 'Edit Field' in green. The main area contains a 'Label Name' field with the text 'Patient Other Services' and a note 'Try to keep it short!'. Below this are checkboxes for 'Wide field' and 'Required field'. There are also checkboxes for 'Spacing within note' with options 'New Line' and 'New Paragraph'. A 'Default value' field is empty. At the bottom, there is a 'Generated text' section with a toolbar. The toolbar has two buttons: 'Edit' and 'Preview'. The 'Preview' button is highlighted with a red box. The toolbar also contains various icons and dropdown menus for text formatting and field types.


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.

Form Management + New Form

Name Tag





| Name  | Tags | Form Setting | Last Modified  | Action |
|--|------|--------------|---|---|
| H&P Assessment | | | 06/18/2024 |    |
| H&P CC / History of Present Illness | | | 06/18/2024 |    |
| H&P Med / Fam / Social History | | | 06/18/2024 |    |
| H&P Physical Exam | | | 06/18/2024 |    |

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.

    Duplicate Form

- Make Form Persistent
- Hide Form Name Header
- Set as Default Form
- Exclude from Complete Note



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

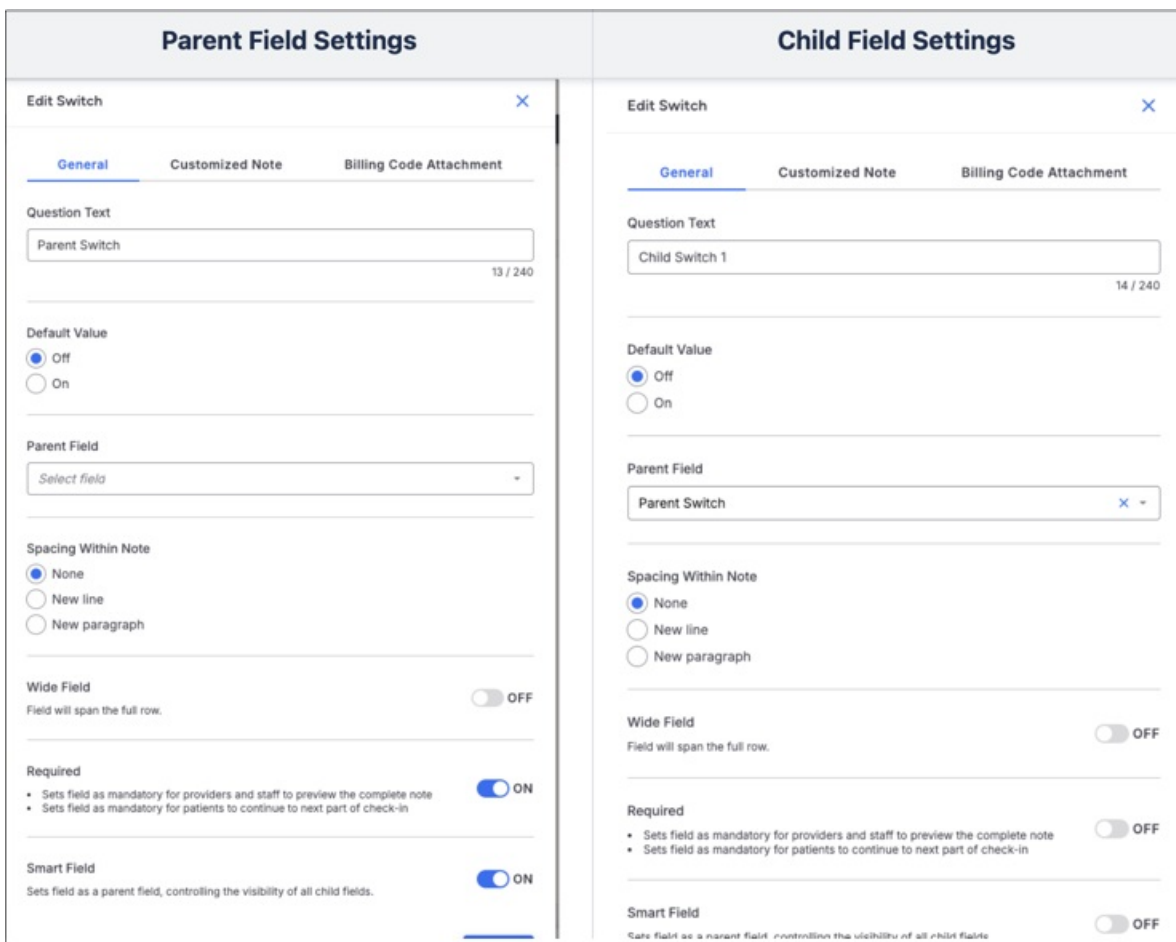
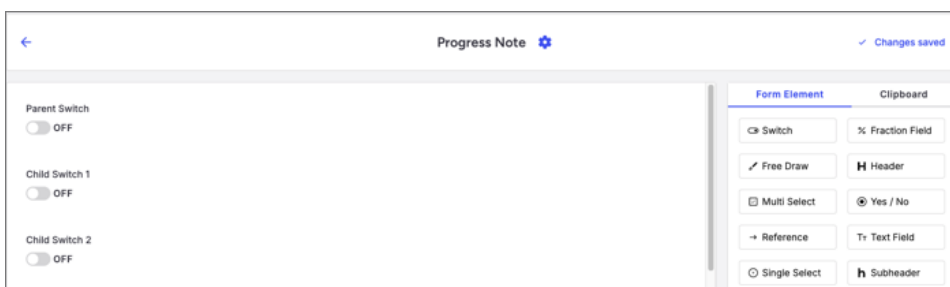
The larger the form, the greater the risk of encountering timeout issues when loading, saving changes, previewing, unlocking, or signing and locking their clinical notes. To minimize these risks, it's best to design forms according to

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.



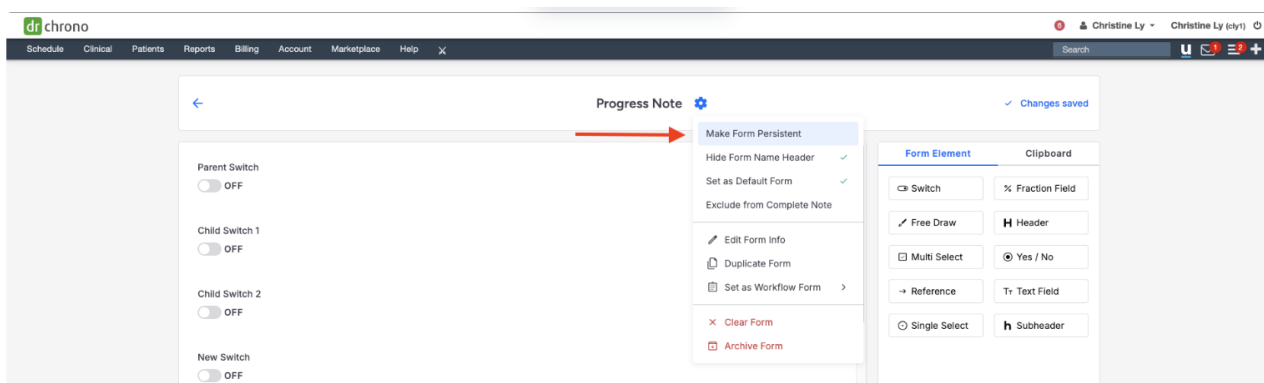
Set forms to be persistent for person-level data only

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.

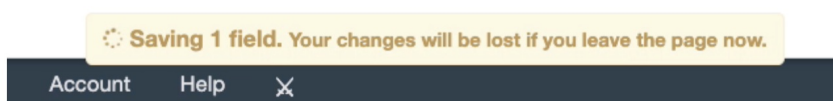
Persistent forms copy the most recently locked clinical note data within a form field so that the next appointment displays the previously inputted information automatically.

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.

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

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**.

The screenshot shows a menu titled "New Clinical Form" with a gear icon. The menu items are: "Make Form Persistent", "Hide Form Name Header", "Set as Default Form", "Exclude from Complete Note", "Edit Form Info" (highlighted with a red arrow), "Duplicate Form", "Set as Workflow Form" (with a right-pointing arrow), "Clear Form" (with a red X icon), and "Archive Form" (with a red trash icon).

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

⋮

🗑️

⋮

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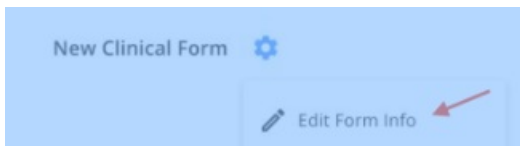
+ Add Value

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

Please select at least one option

Quality

Please select at least one option

Severity

Please select one option

⚠️ 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.

| Name | Tags | Form Setting | Last Modified | Action |
|---|------|--------------|---------------|---|
| Acupuncture SOAP Follow-Up | | | 03/15/2021 | Edit Delete ... |
| 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 | Upload to Library |
| Billing Codes | | | 03/15/2021 | Send as Email |

[Share](#) >

From the form management screen

Navigate to the (...) under the actions column

Click share

Choose upload to library or send as email

From the setting icon