

Form Builder Direct Archive (Clinical Form Management)

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Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) to help users maximize the utilization of the clinical notes feature.

DrChrono has created an easier way to archive, and locate archived and unarchive forms with just a few clicks. See how below:

There are (2) ways to archive a form via Clinical Form Management.

From the form list

1. Navigate to Clinical > Clinical Form Management
2. Locate the form from the list (on the left)
3. Click the icon under the Action column
4. Click Archive Form

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

From the edit option

1. Navigate to Clinical > Clinical Form Management
2. Locate the form from the list (on the left)
3. Click the pencil icon to edit the form (on the right)
4. Click the gear icon located beside the name of the form
5. Click archive form



4. Please rate the following on a scale of 0-10 with 0 being NONE and 10 being the WORST

This is only a test

TTest

Subjective

History of Present Illness

- 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

Locating archived forms

1. Navigate to Clinical > Archive (beta)
2. Action column
3. Unarchive or search unlocked notes associated with the archived form
4. Pop-up will appear confirming form has been restored



Restored form

