

Form Builder Direct Archive (Form Builder - beta)

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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 the Form Builder (beta).

From the form list

1. Navigate to Clinical > Form Builder (beta)
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 > Form Builder (beta)
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

How to locate archived forms to (1) locate unlocked notes associated with the form OR (2) to unarchive the form.

1. Navigate to Clinical > Archive (beta)

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

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