

Form Builder Overview

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Beginning in **February 2026**, 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](#).

DrChrono's Form Builder allows you to create and customize your clinical templates, allowing you to focus on patient care with forms that are specific to your practice.

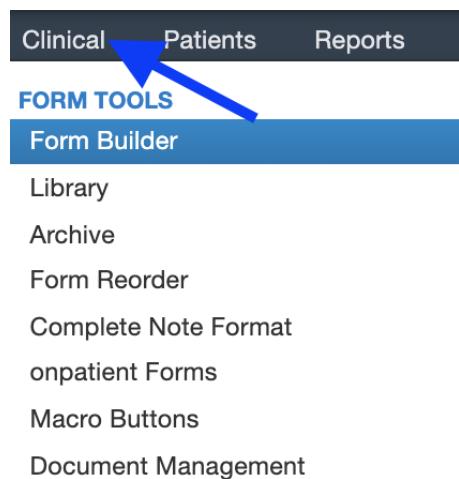
Video Tutorial



Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

Step by Step Instructions

1. To get to the Form Builder, go to **Clinical > Form Builder**.



2. The Form Builder consists of 3 main parts: Form List on the right, Form Tools on the left, and the building screen in the middle.

Form Builder

The screenshot shows the Form Builder interface. On the left is the 'Form List' sidebar with tabs for 'Presets' (selected) and 'Additional'. The 'Presets' tab lists various forms: H&P CC / History of Present Illness, H&P Med / Fam / Social History, H&P Review of Systems, H&P Physical Exam, H&P Assessment, H&P Plan, SOAP Subjective, SOAP Objective, SOAP Assessment, and SOAP Plan. A '+' button is at the top of the sidebar. The central area is a workspace titled 'Choose a form' with a large gray placeholder. On the right is the 'Form Tools' sidebar with tabs for 'New Fields' (selected) and 'Field Clipboard'. Under 'New Fields', there are sections for 'Short Text Field', 'Yes / No' (with Y/N buttons), 'Switch' (with ON/OFF buttons), 'Single Select' (with a checked checkbox), 'Multiple Select' (with a checked checkbox), 'Free Draw' (with a pencil icon), 'Fraction Field' (with a checked checkbox), 'Header', 'Subheader', and 'Reference Field' (with a plus/minus icon). A legend at the top right includes icons for Edit, Move, Copy to clipboard, and Archive.

3. The Form List consists of **Presets** forms which are H&P, SOAP, and OnPatient forms that you can use and/or customize; the **Additional** tab is where any forms you have created or selected from the Form Library; the (

+) is used to start a form.

This screenshot shows the 'Form List' sidebar with the 'Additional' tab selected. It lists several custom forms: onpatient Additional Info and onpatient Reasons For Visit.

4. The middle section of the Form Builder is where all of the building, editing, and customizing of templates takes place. To edit a form, simply select it from the **Presets** or **Additional** tabs. The **Options** menu allows you to apply certain settings to the selected form. For more on the **Options** menu, click [here](#).

Form Builder

The screenshot shows the Form Builder interface. On the left is a 'Form List' sidebar with categories like 'Presets' and 'Additional'. A specific form template, 'H&P CC / History of Present Illness', is selected and displayed in the center. This template contains fields for Location, Quality, Severity, Duration, Onset / Timing, Context, and Modifying Factors, each with a dropdown menu and a comments field. At the bottom of this template is a yellow-highlighted 'Options' button. To the right is a 'Form Tools' sidebar with tabs for 'New Fields' and 'Field Clipboard'. Under 'New Fields', there are ten options: Short Text Field, Yes / No, Switch, Single Select, Multiple Select, Free Draw, Fraction Field, Header, Subheader, and Reference Field. Each option has a small icon and a configuration button.

5. The **Form Tools** consists of two parts: **New Fields** and **Field Clipboard**. **New Fields** are the types of fields that can be added to a form for clinical charting or patient onboarding.

This screenshot shows the 'Form Tools' sidebar with the 'New Fields' tab selected. The sidebar lists ten field types: Short Text Field, Yes / No, Switch, Single Select, Multiple Select, Free Draw, Fraction Field, Header, Subheader, and Reference Field. Each field type has a corresponding icon and a configuration button.

You can copy fields to use again in the same or other templates by using the



) in the lower left-hand corner of any field. This will copy the field to the **Field Clipboard** for later use.

This screenshot shows a specific field within a template, labeled 'Location Comments'. In the bottom-left corner of the input field, there is a small blue icon with a white 'C' and a clipboard symbol, which is the copy icon mentioned in the text above.

For an explanation of the **New Fields** click here.

Click [here](#) for our YouTube playlist on Form Building.

Click [here](#) for our article on the types of fields you can use to create a medical note.
