Form Builder Overview

Last modified on 10/16/2024 11:41 am EDT

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.

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

a

Step by Step Instructions

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

Clinical	Patients	Reports
FORM TOO	LS	
Form Buil	der	
Library		
Archive		
Form Reo	rder	
Complete	Note Forma	ıt
onpatient	Forms	
Macro Bu	ttons	
Documen	t Manageme	nt

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					Legend:	🖋 Edit	🕂 Move	ℜ Copy to clipboard	× Archive
Form List	+		🗲 Choi	ose a form			Form Tools	3	
Presets Additional							New Fields	Field Clipboard	
H&P CC / History of Present Illness							1	lew Section SOAP S	ection
H&P Med / Fam / Social History	_						Ob I To		
H&P Review of Systems							Short Tex	t Field	
H&P Physical Exam	_						Yes / No		YN
H&P Assessment							Switch		ON
H&P Plan							Single Se	lect	
SOAP Subjective	D						Multiple S	Select	
SOAP Objective							Free Drav	v	11/11
SOAP Assessment							Fraction I	Field	0/0
SOAP Plan							Header		
							Subhead	ər	
		Options -		Save a	s Save		Reference	e Field	

3. The Form List consists of **Preset** 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.

Form List +					
Presets Additional					
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					
SOAP Plan					
onpatient Additional Info					
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			Legend:	🖋 Edit	🕂 Move 🔌	Copy to clipboard	X Archive
Form List +	H&P CC / Histo	ory of Present Illness			Form Tools		
Presets Additional	Location	Location Comments			New Fields	Field Clipboard	
H&P CC / History of Present Illness	Multiple Select				Short Text F	Field	
H&P Med / Fam / Social History	Quality Multiple Select	Quality Comments			Yes / No		YN
H&P Review of Systems					Switch		ONO
H&P Physical Exam	Severity Single Select	Severity Comments			Single Sele	ct	
H&P Assessment	Duration	Duration Comments			Multiple Se	lect	
H&P Plan	Multiple Select				Free Draw		Mm
SOAP Subjective	Onset / Timing	Onset Comments			Fraction Fie	ald	0/0
SOAP Objective	Multiple Select				Header		
SOAP Assessment	Context	Context Comments			Subheader		
SOAP Plan	Multiple Select • • • •				Reference I		
Share	Modifying Factors	Modifying Factors Comments			Reference	riela	+>
Library Email f Facebook Y Twitter	Options 🔺	Save as	Save				

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.

Form Tools		
New Fields	Field Clipboard	
Short Text F	ield	
Yes / No		YN
Switch		ON
Single Selec		
Multiple Sele	ect	
Free Draw		MM
Fraction Fiel	0/0	
Header		
Subheader		
Reference F	ield	$\stackrel{\bullet}{\to}$

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

Ø

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

Location Comments 🖋	
	+ 📎 ×

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.