

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.

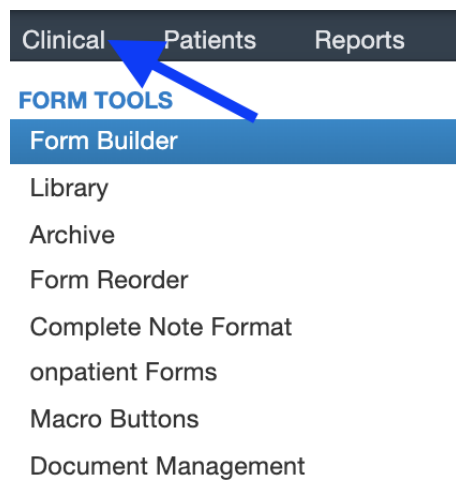
Video Tutorial



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 displays the Form Builder interface. At the top, a legend bar includes icons for Edit, Move, Copy to clipboard, and Archive. The interface is divided into three main sections:

- Form List (Left):** A sidebar with a 'Form List' header and a '+' icon. It contains two tabs: 'Presets' and 'Additional'. Under 'Presets', there is a list of form templates: 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. The 'SOAP Subjective' form is highlighted with a 'D' icon.
- Central Canvas:** A large area with a dark header 'Choose a form' and a large gray rectangle representing the form template. At the bottom, there are buttons for 'Options', 'Save as', and 'Save'.
- Form Tools (Right):** A sidebar with a 'Form Tools' header. It contains two tabs: 'New Fields' and 'Field Clipboard'. Under 'New Fields', there are buttons for 'New Section' and 'SOAP Section'. Below these are various field types: Short Text Field, Yes / No, Switch, Single Select, Multiple Select, Free Draw, Fraction Field, Header, Subheader, and Reference 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.

This close-up screenshot shows the 'Form List' sidebar. The 'Form List' header has a '+' icon. Below it are two tabs: 'Presets' and 'Additional'. The 'Additional' tab is selected and highlighted with a black border. Below the tabs is a list of form templates: 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, and onpatient Reasons For Visit. The 'SOAP Subjective' form is highlighted with a 'D' icon.

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](#).

The screenshot shows the Form Builder interface. On the left is the 'Form List' with a search bar and a list of forms. The 'H&P CC / History of Present Illness' form is selected and highlighted. In the center is the form preview, which is a table with columns for field names and comments. The 'Form Tools' panel is on the right, showing two tabs: 'New Fields' and 'Field Clipboard'. The 'New Fields' tab is active, displaying a list of field types with their corresponding icons: Short Text Field, Yes / No, Switch, Single Select, Multiple Select, Free Draw, Fraction Field, Header, Subheader, and Reference Field.

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.

The screenshot shows the 'Form Tools' panel. The 'New Fields' tab is active, displaying a list of field types with their corresponding icons: Short Text Field, Yes / No, Switch, Single Select, Multiple Select, Free Draw, Fraction Field, Header, Subheader, and Reference Field. The 'Field Clipboard' tab is also visible.

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.

The screenshot shows a form field labeled 'Location Comments'. In the lower left-hand corner of the field, there is a copy icon (pencil and paper) which is highlighted with a black box.

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.
