Form Tools: New Fields Explained

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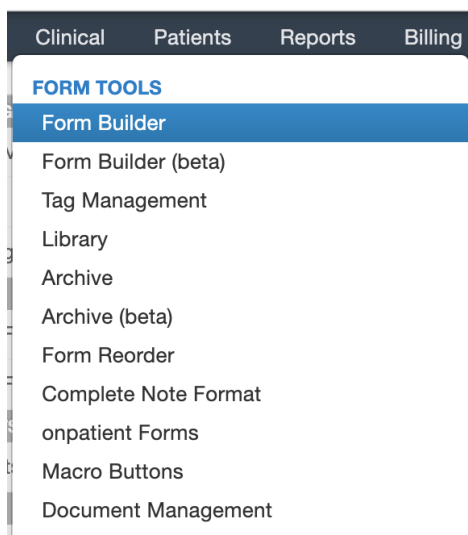
> ℹ️ Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to Clinical Form Management. For more details and answers to common questions, please refer to our FAQ article.

DrChrono's **Form Tools** consist of different types of fields that allow you to build templates to use in clinical notes and patient onboarding. You have several types of fields at your disposal, all of which can be used to populate text into your clinical notes or OnPatient forms.
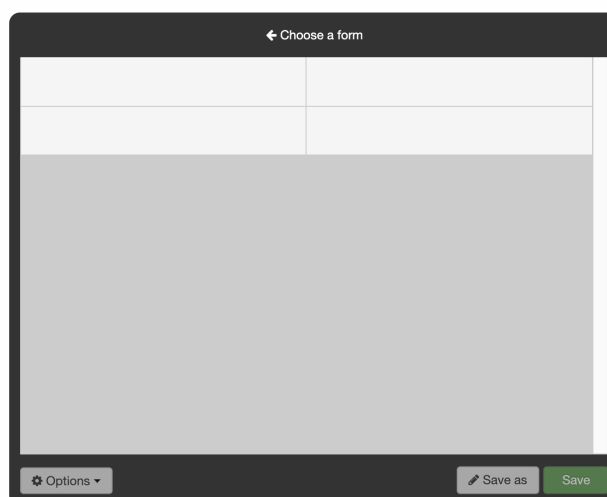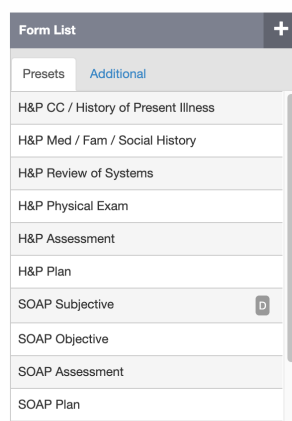
Before building your form, we recommend reviewing Best Practices for Building Custom Forms to help users maximize the utilization of the clinical notes feature.

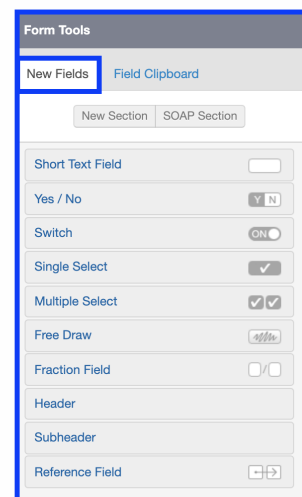1. To access the **Form Tools** go to **Clinical** > **Form Builder**.

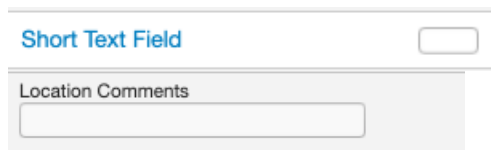2. The **Form Tools** are located on the right-hand side of the main Form Builder screen.
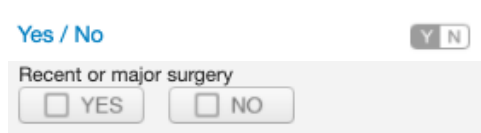
3. Each field performs a different function in building a form depending on the type of question, text entry, or selection you need.

4. The **Short Text Field** allows you to create a field where you can freely type anything you need for clinical documentation. Click here for more information.

5. The **Yes/No** gives you the ability to generate different text on your note based on the affirmative or negative response. Click here for more information.
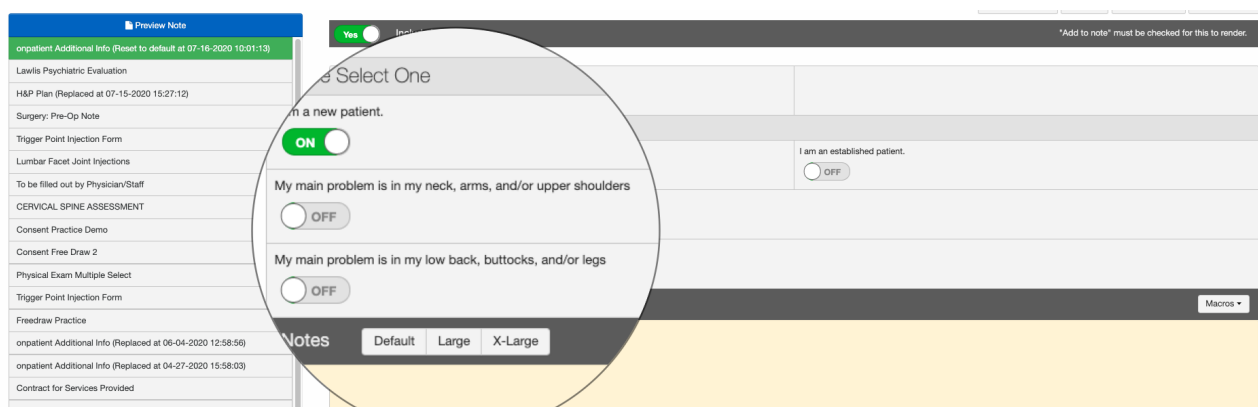

6. A **Switch** can perform 2 functions:

a. Turn "ON" or "OFF" generated text in your clinical note. This could be specific instructions for different conditions, notes, etc. that you wish to reflect in your clinical note. In the example below, the **Switch** populates the text 'POSTURE' on the note.

b. A switch can also serve as a smart field, which means it can turn "ON" or "OFF" other fields that are connected to it.

Before: In the example below, the switch 'My main problem is in my neck, arms and/or upper shoulders.' is turned "OFF".

After: The switch 'My main problem is in my neck, arms and/or upper shoulders.' is turned "ON" and all fields below it appear once it is activated.

For more information on how to use a **Switch** click here.

7. **Single Select** and **Multiple Select** fields allow you to create dropdown menus to choose from to populate your clinical note.

Single Select field allows you to select one option from a list.

A **Multiple Select** allows you to choose as many options as you would like from the list.

For more information on **Single Select** and **Multiple Select** fields click here.

8. **Free Draw** fields allow you to upload a diagram/image or to take a picture to include with the clinical note. It is important to note that you can only use **Free Draw** fields on the DrChrono EHR app or the Check-In app for iPad. **Free Draw** fields are read-only on the web and not compatible with other tablet devices.

For more information on **Free Draw** fields click here.

9. A **Fraction Field** allows you to enter any values that require a numerator and denominator.

For more information on the **Fraction Field** click here.

10. The **Header** and **Subheader** fields allow you to further organize your note. Both fields will render in bold on your clinical note.

Header

Subheader

Psychiatric Evaluation

History of the Presenting Problem

On the clinical note, the **Header** and **Subheader** fields generate like the examples below.

Psychiatric Evaluation

History of the Presenting Problem

For more information on **Header** and **Subheader** fields click here.

11. The **Reference Field** pulls entered values from fields in other templates or duplicates values in the same template. In the example below, the chief complaint is pulled in from a different form. In order for a reference field to work, the original field needs to have data in it.

Reference Field

Chief Complaint