

Form Tools: New Fields Explained

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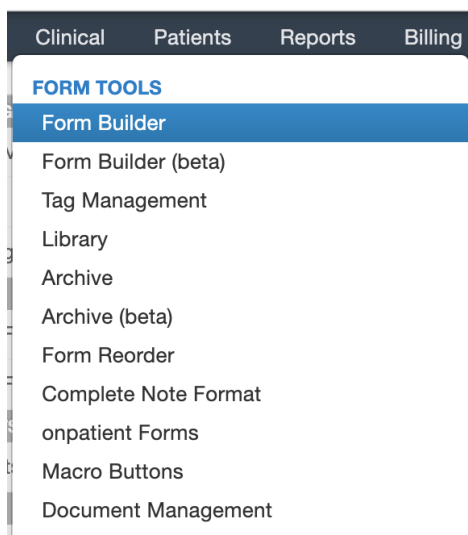


Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to [Clinical Form Management](#). For more details and answers to common questions, please refer to our [FAQ](#) article.

DrChrono's **Form 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.

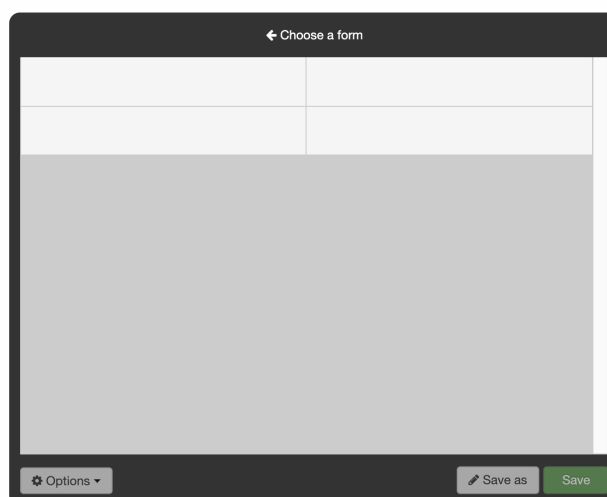
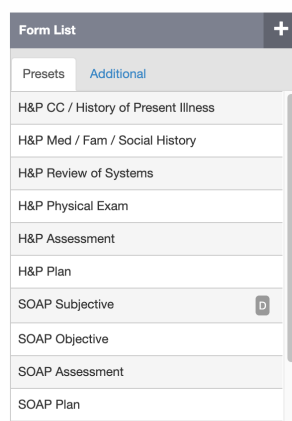
Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) to help users maximize the utilization of the clinical notes feature.

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

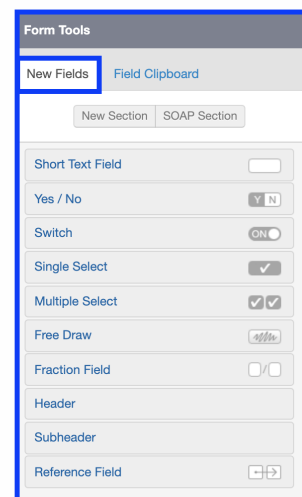


2. The **Form Tools** are located on the right-hand side of the main Form Builder screen.

Form Builder

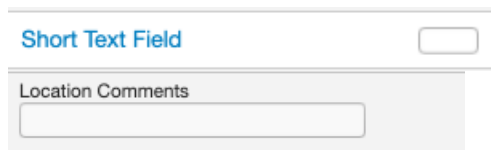


Legend: Edit Move Copy to clipboard Archive

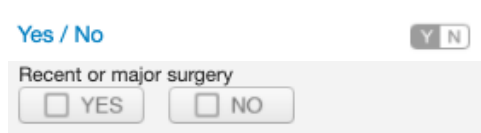


3. Each field performs a different function in building a form depending on the type of question, text entry, or selection you need.

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.

A screenshot of a 'Short Text Field' component. It features a blue header with the text 'Short Text Field' and a small empty text input box to its right. Below this, there is a grey rectangular box containing the label 'Location Comments' and a larger empty text input field.

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.

A screenshot of a 'Yes / No' component. It has a blue header with the text 'Yes / No' and a small 'Y N' button to its right. Below the header is a grey box with the label 'Recent or major surgery'. Inside this box are two buttons: 'YES' and 'NO', each with a small square icon to its left.

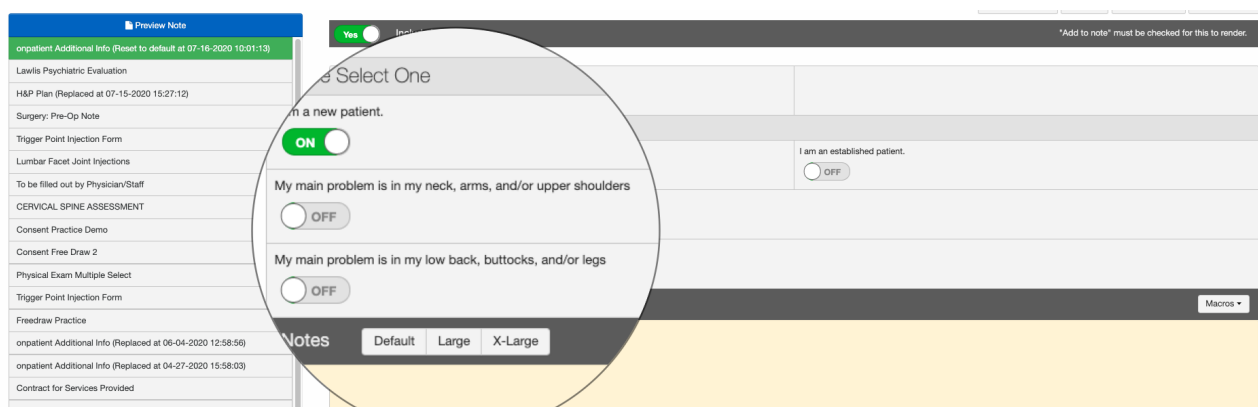
6. A **Switch** can perform 2 functions:

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.

A screenshot of a 'Switch' component. It has a blue header with the text 'Switch' and a small 'ON' button to its right. Below the header is a grey box with the label 'POSTURE'. Inside this box is a green button with the text 'ON' and a small circle icon to its right.

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".

A screenshot of a form preview. On the left is a sidebar with a list of items including 'onpatient Additional Info', 'Lawlis Psychiatric Evaluation', 'H&P Plan', 'Surgery: Pre-Op Note', 'Trigger Point Injection Form', 'Lumbar Facet Joint Injections', 'To be filled out by Physician/Staff', 'CERVICAL SPINE ASSESSMENT', 'Consent Practice Demo', 'Consent Free Draw 2', 'Physical Exam Multiple Select', 'Trigger Point Injection Form', 'Freedraw Practice', and 'onpatient Additional Info (Replaced at 06-04-2020 12:58:56)'. The main area shows a 'Select One' dropdown menu with 'ON' selected. Below this are two radio button options: 'My main problem is in my neck, arms, and/or upper shoulders' (which is selected) and 'My main problem is in my low back, buttocks, and/or legs'. To the right of these options is a small 'OFF' button. At the bottom of the main area is a 'Notes' section with 'Default', 'Large', and 'X-Large' options. A circular callout highlights the 'ON' button and the two radio button options.

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.

Please Select One	
I am a new patient. <input checked="" type="radio"/> ON	I am an established patient. <input type="radio"/> OFF
My main problem is in my neck, arms, and/or upper shoulders <input checked="" type="radio"/> ON	
Referring Doctor name and full address <input type="text"/>	
Have you ever been injured before? <small>(Please select one option)</small>	If so, date of injury <input type="text"/>
Please select your chief complaint(s)	
Neck Pain <input type="radio"/> OFF	Arm pain <input type="radio"/> OFF
Arm numbness <input type="radio"/> OFF	Arm weakness <input type="radio"/> OFF
Others, please specify <input type="text"/>	What started the problem? <input type="text"/>

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.

Single Select ☒

Pain is on
Single Select

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

Multiple Select ☒ ☒

Past Medical History
Multiple Select

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.

Free Draw 

Mark Areas of Pain


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.

Fraction Field /

Frequency of pain (days / week)
 /

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