

Form Tools: New Fields Explained

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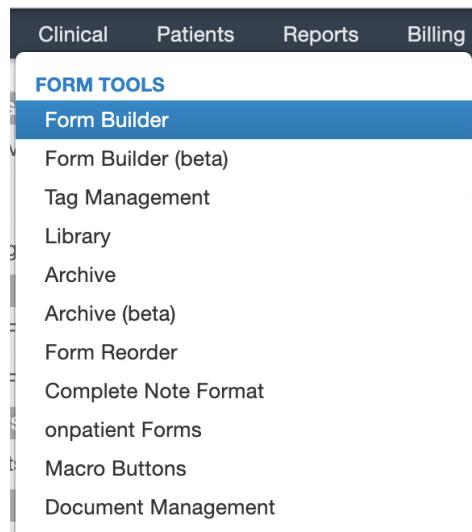


Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to Clinical Form Management. For more details and answers to common questions, please refer to our [FAQ article](#).

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:

The screenshot shows the Form Builder interface. On the left is a 'Form List' sidebar with 'Presets' and 'Additional' tabs. Under 'Additional', there are lists for 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 central area is a 'Choose a form' editor with a large gray workspace. The right side is the 'Form Tools' panel, which is divided into 'New Fields' and 'Field Clipboard' tabs. The 'New Fields' tab is active and displays a list of 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 switch button.

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.

Short Text Field

Location Comments

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.

Yes / No

Recent or major surgery

YES NO

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.

Switch

POSTURE

ON

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".

Preview Note
onpatient Additional Info (Reset to default at 07-16-2020 10:01:19)
Lawlis Psychiatric Evaluation
H&P Plan (Replaced at 07-15-2020 15:27:12)
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
onpatient Additional Info (Replaced at 06-04-2020 12:58:56)
onpatient Additional Info (Replaced at 04-27-2020 15:58:03)
Contract for Services Provided
SNAP Plan (Replaced at 07-15-2020 14:59:03)

Yes Inclusive
Select One
I am a new patient.
 ON
My main problem is in my neck, arms, and/or upper shoulders
 OFF
My main problem is in my low back, buttocks, and/or legs
 OFF

Notes Default Large X-Large

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

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	<input type="button" value="↔"/>
Chief Complaint	<input type="button" value="↔"/>