

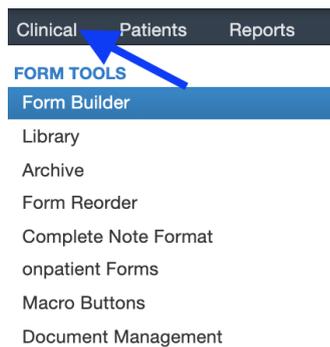
# Excluding Forms from the Clinical Note

Last modified on 02/23/2026 1:37 pm EST

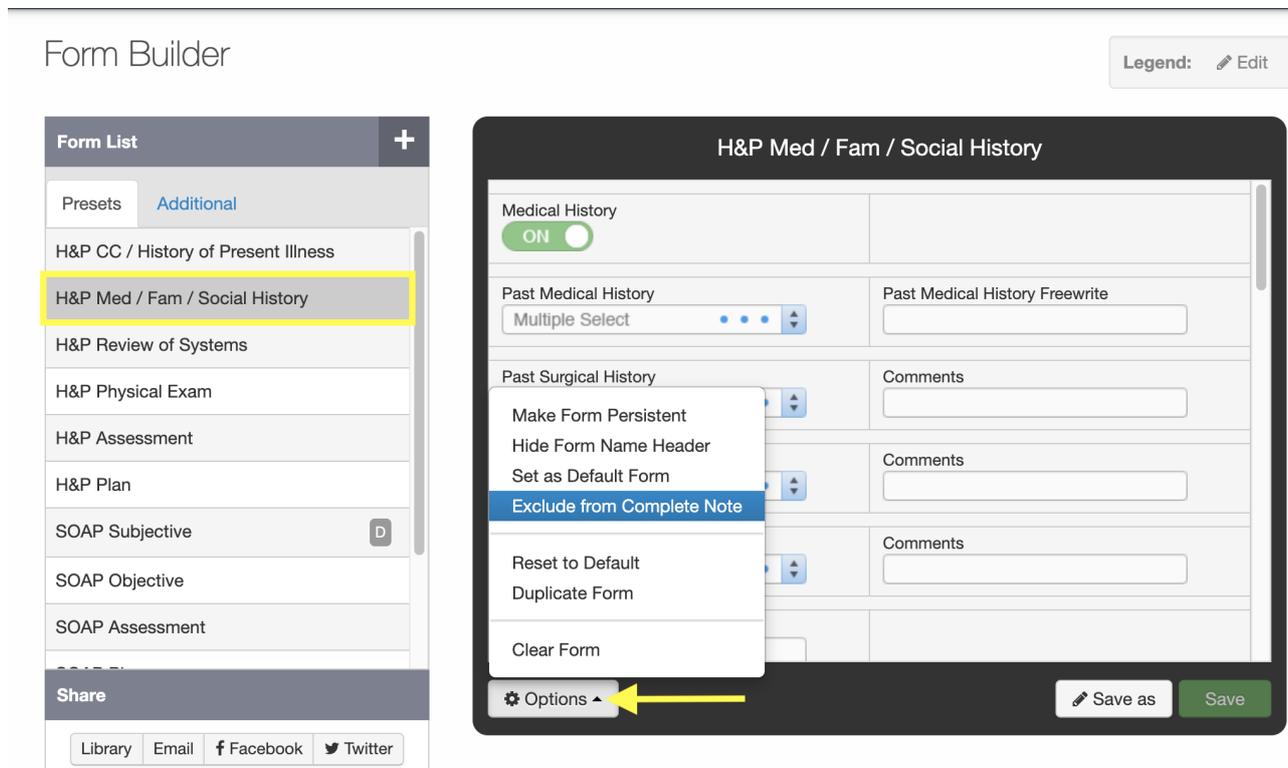
Through DrChrono's Form Builder settings, you can exclude a form or multiple forms from your complete note. Excluding templates from the complete note allows you to still complete forms during a clinical visit, but the information you document will not appear on the rendered clinical note for the visit.

Click the support article to review [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

1. To exclude a clinical template from the note, go to **Clinical > Form Builder**.



2. Select the form from the **Form List** that you would like to exclude, click on the **Options** menu, and click **Exclude from Complete Note**.



3. Next to the form you have excluded from the complete note will be an ( **E** ) icon.

# Form Builder

Legend: Edit

**Form List** +

Presets **Additional**

- H&P CC / History of Present Illness
- H&P Med / Fam / Social History** E
- H&P Review of Systems
- H&P Physical Exam
- H&P Assessment
- H&P Plan
- SOAP Subjective D
- SOAP Objective
- SOAP Assessment

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### H&P Med / Fam / Social History

Medical History  ON

Past Medical History: Multiple Select | Past Medical History Freewrite

Past Surgical History: Multiple Select | Comments

Childhood illnesses: Multiple Select | Comments

Childhood Immunizations: Multiple Select | Comments

Date of last PE

Options Save as Save

4. The excluded form, will not appear on the complete note, but can still be filled out.

**Status: Not Locked**

**Chief Complaint:** Pain

**History of Present Illness:**  
Peter Django describes the location to be lateral  
The quality of pain is described as aching, burning and a severity / intensity level of 9 out of 10  
This duration of the problem stated is as follows: symptoms are --, most symptomatic in morning  
Patient explains the timing/onset of signs/symptoms to be continuous.  
The patient states signs and symptoms occurred during physical exertion  
The signs and symptoms described abated when on medication(s)  
Associated symptoms include: numbness, weakness, headache

**Medications & Allergies:**

Current Medication & Dosage	Dispense	SIG	PRN?	Indication
Vyvanse 40 mg oral capsule	0	0	No	
Riluzole 10 mg oral tablet	0	0	No	
ALPRAZOLAM 1 mg oral tablet	0	0	No	

Allergy	Reaction

5. If you would like to return the excluded template in the note, follow the same steps and select **Include in Complete Note**.

**Form List** +

Presets **Additional**

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- H&P Med / Fam / Social History** E
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**H&P Med / Fam / Social History**

Medical History  ON

Past Medical History Multiple Select ••• ▼ Past Medical History Freewrite

Past Surgical History ••• ▼ Comments

Make Form Persistent  
Hide Form Name Header  
Set as Default Form  
**Include in Complete Note**  
Reset to Default  
Duplicate Form  
Clear Form

Options  

Save as Save