Excluding Forms from the Clinical Note

Last modified on 01/12/2026 3:53 pm EST

> 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.

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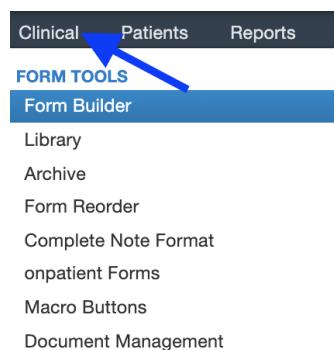
2. Select the form from the **Form List** that you would like to exclude, click on the **Options** menu, and click **Exclude from Complete Note**.

3. Next to the form you have excluded from the complete note will be an (E) icon.
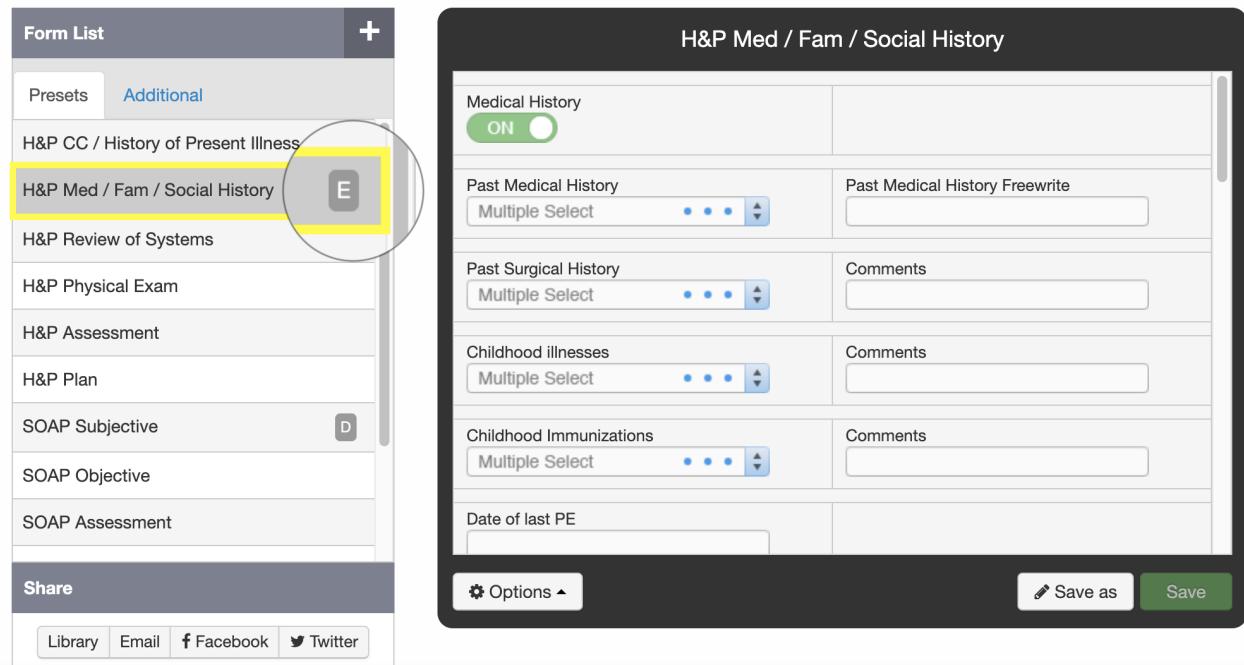
4. The excluded form, will not appear on the complete note, but can still be filled out.
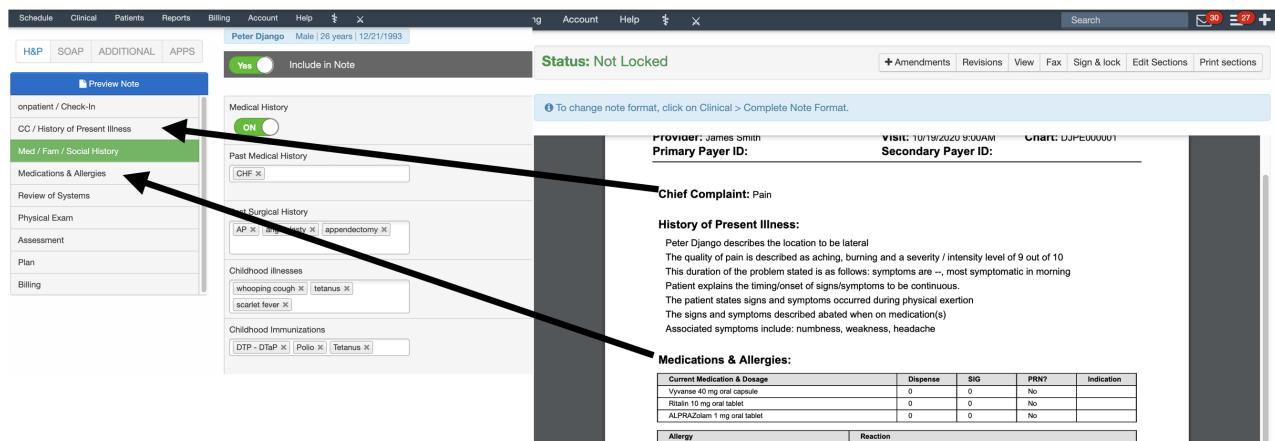
5. If you would like to return the excluded template in the note, follow the same steps and select **Include in Complete Note**.

Form Builder

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
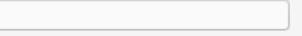
Past Surgical History
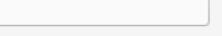
| Make Form Persistent |
| Hide Form Name Header |
| Set as Default Form |
| **Include in Complete Note** |
| Reset to Default |
| Duplicate Form |
| Clear Form |
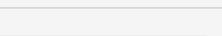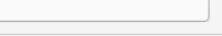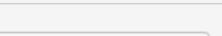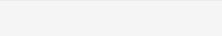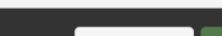
Comments

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⚙ Options ▲

✏ Save as   Save