

Excluding Forms from the Clinical Note

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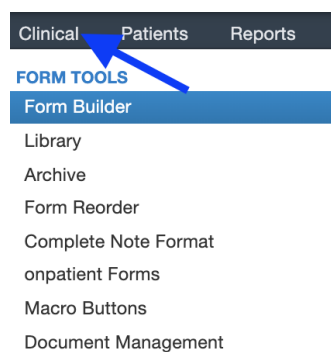


Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to **Clinical Form Management**. For more details and answers to common questions, please refer to our [FAQ](#) article.

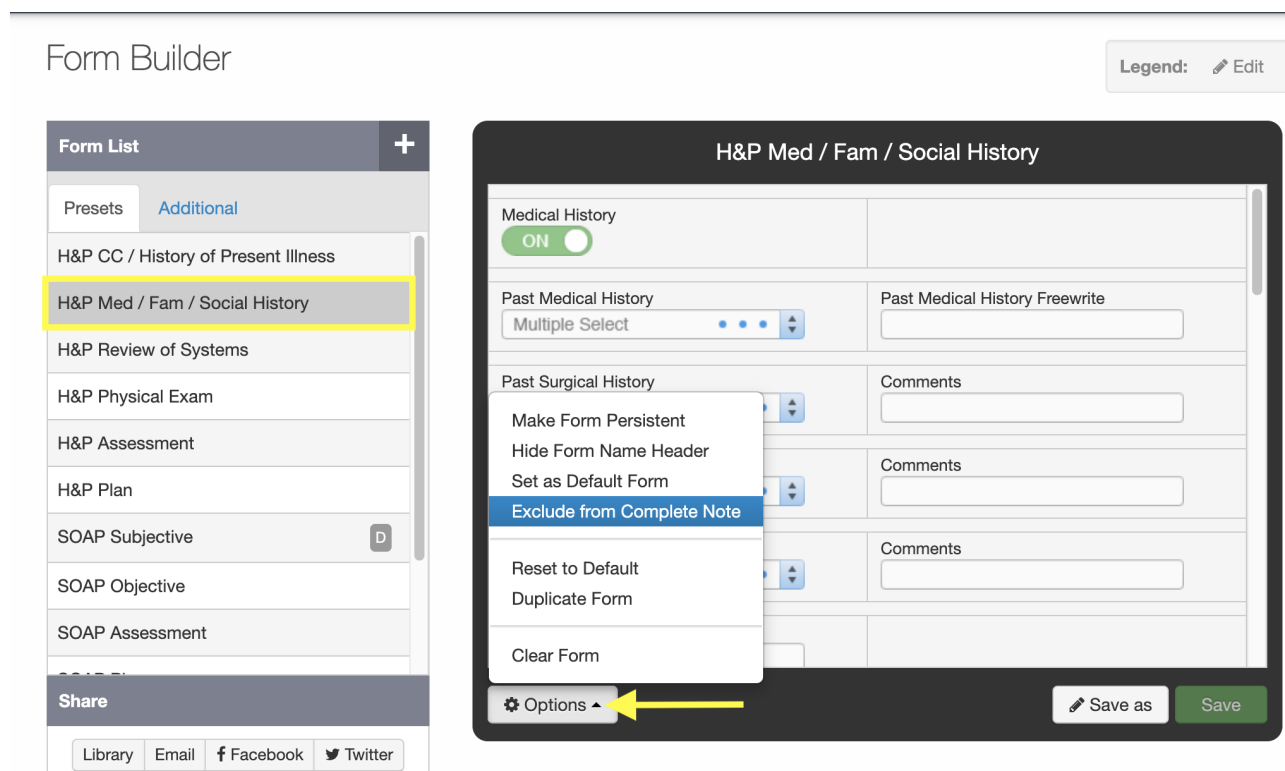
Through DrChrono's Form Builder settings, you can exclude a form or multiple forms from your complete note. Excluding templates from the complete note allows you to still complete forms during a clinical visit, but the information you document will not appear on the rendered clinical note for the visit.

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

Form List

Presets

Additional

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

Share

Library

Email

f Facebook

Twitter

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.

Schedule

Clinical

Patients

Reports

Billing

Account

Help

Account

Help

Search

90

87

H&P

SOAP

ADDITIONAL

APPS

Peter Django

Male

25 years

12/21/1993

Yes

Include in Note

Status: Not Locked

Amendments

Revisions

View

Fax

Sign & lock

Edit Sections

Print sections

Preview Note

onpatient / Check-In

CC / History of Present Illness

Med / Fam / Social History

Medications & Allergies

Review of Systems

Physical Exam

Assessment

Plan

Billing

Medical History

ON

Past Medical History

OHF

Past Surgical History

AP

Appendectomy

Childhood illnesses

whooping cough

scarlet fever

Childhood Immunizations

DTP - DTaP

Polio

Tetanus

Provider: James Smith

Visit: 10/19/2020 9:00AM

Chart: DUPE000001

Primary Payer ID:

Secondary Payer ID:

Chief Complaint: Pain

History of Present Illness:

Medications & Allergies:

Current Medication & Dosage	Dispense	SIG	PRN?	Indication
Vyvanse 40 mg oral capsule	0	0	No	
Ritalin 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

H&P CC / History of Present Illness

H&P Med / Fam / Social History

H&P Review of Systems

H&P Physical Exam

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SOAP Assessment

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Facebook

Twitter

H&P Med / Fam / Social History

Medical History

ON

Past Medical History

Multiple Select

Past Medical History Freewrite

Past Surgical History

Comments

Comments

Comments

Comments

Options

Save as

Save