

Excluding Forms from the Clinical Note

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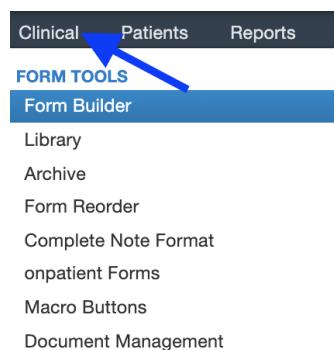


Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to Clinical Form Management. For more details and answers to common questions, please refer to our [FAQ article](#).

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.

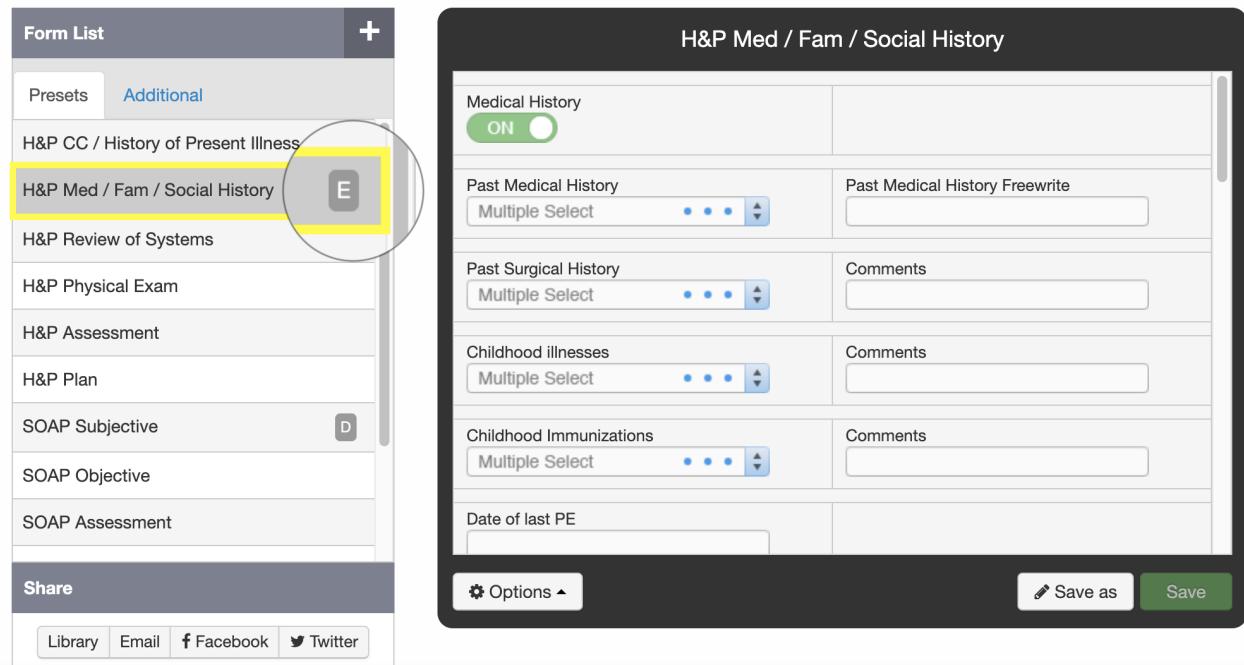
1. To exclude a clinical template from the note, go to [Clinical > Form Builder](#).



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**.

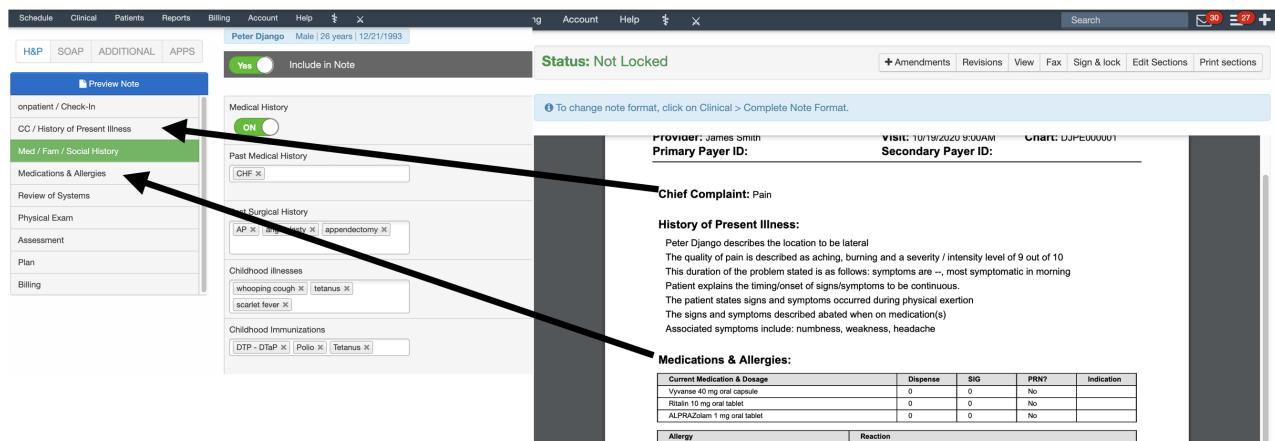
3. Next to the form you have excluded from the complete note will be an (E) icon.

Form Builder



The screenshot shows the Form Builder interface. On the left, the 'Form List' sidebar shows various forms: 'H&P CC / History of Present Illness', 'H&P Med / Fam / Social History' (highlighted with a yellow box and circled 'E'), 'H&P Review of Systems', 'H&P Physical Exam', 'H&P Assessment', 'H&P Plan', 'SOAP Subjective' (with a circled 'D'), 'SOAP Objective', 'SOAP Assessment', and 'Share' options. On the right, a detailed view of the 'H&P Med / Fam / Social History' form is shown, including sections for Medical History (ON), Past Medical History (Multiple Select), Past Surgical History (Multiple Select), Childhood Illnesses (Multiple Select), Childhood Immunizations (Multiple Select), and Date of last PE. The bottom right of the form view has 'Save as' and 'Save' buttons.

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



The screenshot shows the Clinical module's 'Preview Note' screen. The sidebar on the left lists 'H&P', 'SOAP', 'ADDITIONAL', and 'APPS'. The 'ADDITIONAL' section is expanded, showing buttons for 'oppatient / Check-In', 'CC / History of Present Illness', 'Med / Fam / Social History' (highlighted with a green box and an arrow), 'Medications & Allergies' (highlighted with a green box and an arrow), 'Review of Systems', 'Physical Exam', 'Assessment', 'Plan', and 'Billing'. The main note body shows the 'Med / Fam / Social History' and 'Medications & Allergies' sections, which are excluded from the note. The note body includes sections for 'Status: Not Locked', 'Provider: James Smith', 'VISIT: 10/19/2020 9:00AM', 'Chart: DJPE000001', 'Primary Payer ID: [redacted]', 'Secondary Payer ID: [redacted]', 'Chief Complaint: Pain', 'History of Present Illness', and 'Medications & Allergies' (with a table showing current medication, dispense, SIG, PRN?, and indication).

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

Legend:  Edit

Form List 

Presets 

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

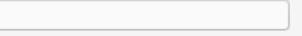
SOAP Assessment

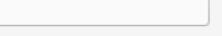
Share

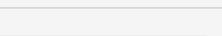
Library Email  Facebook  Twitter

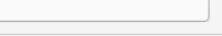
H&P Med / Fam / Social History

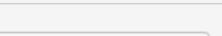
Medical History 

Past Medical History   Past Medical History Freewrite 

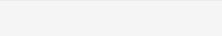
Past Surgical History   Comments 

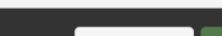
Make Form Persistent   Comments 

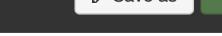
Hide Form Name Header   Comments 

Set as Default Form   Comments 

Include in Complete Note   Comments 

Reset to Default   Comments 

Duplicate Form   Comments 

Clear Form   Comments 

 Options 

 Save as  Save

 Options