

# Adding Clinical Codes to Forms

Last modified on 10/16/2024 11:38 am EDT



Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

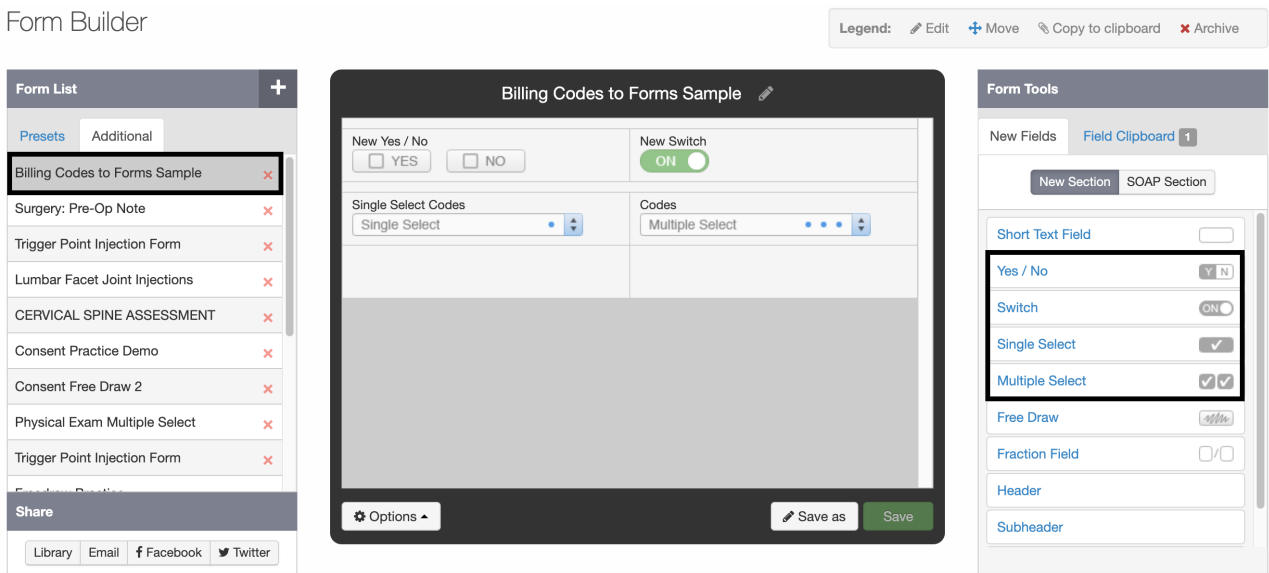
You can connect clinical codes (ICD-10, CPT, HCPCS, and custom codes) to form/template fields so they populate billing information while completing your clinical note. You can add codes to the following fields:

- [Yes / No](#)
- [Switch](#)
- [Single Select and Multiple Select](#)

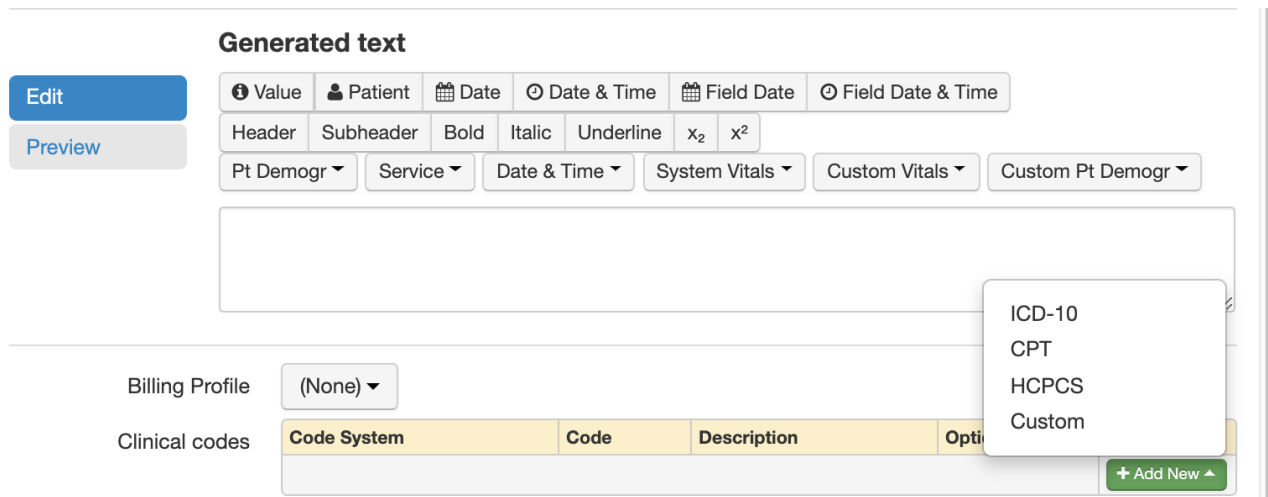
1. Go to **Clinical > Form Builder**.

2. Select the form you would like to use from the **Form List** and add the desired fields from the **Form Tools**.

Form Builder



3. Underneath the **Generated Text** area, there will be a **Clinical Codes** section. Click **+Add New** to choose the type of code you want to add.



4. Once the code type is selected, you can search for the code by keyword or number or by entering the code directly into the field.

## Adding Codes to Yes / No Fields

With Yes / No fields, you can add codes to populate when **Yes** or **No** is chosen.

1. After selecting the codes you would like to use, you can tie them to either **Yes** or **No** under the **Option** column.
2. When finished click **Update Field** to save your changes.

**Edit Field** ✕

Pt Demogr ▾ Service ▾ Date & Time ▾ System Vitals ▾ Custom Vitals ▾ Custom Pt Demogr ▾

Physical Exam Normal

**Affirmative no generated text**

**Edit** Preview

Value Patient Date Date & Time Field Date Field Date & Time

Header Subheader Bold Italic Underline x<sub>2</sub> x<sup>2</sup>

Pt Demogr ▾ Service ▾ Date & Time ▾ System Vitals ▾ Custom Vitals ▾ Custom Pt Demogr ▾

Physical Exam Abnormal

Billing Profile (None) ▾

Clinical codes

Code System	Code	Description	Option	
ICD-10	Z00.00	Encounter for general adult medical examination without abnormal findings	Yes	<span style="color: red;">✕ Remove</span>
CPT	99213	OFFICE/OUTPATIENT VISIT EST	Yes	<span style="color: red;">✕ Remove</span>
ICD-10	Z00.01	Encounter for general adult medical examination with abnormal findings	No	<span style="color: red;">✕ Remove</span>
CPT	99213	OFFICE/OUTPATIENT VISIT EST	No	<span style="color: red;">✕ Remove</span>

+ Add New ^

➡ Update field

3. Codes associated with either the yes or no option within a specific form will also appear in the billing section of the form.

## Adding Codes to Switches

With a switch, you can tie multiple codes that will populate when the switch is activated in the note.

1. Once you click **+Add New**, you can select the code type and use the search field to find the desired code. Repeat for all the codes you would like to be under the switch.

## Edit Field ✕

Label Name  Try to keep it short!

Required field

Spacing within note  New Line  New Paragraph  Smart Field

Default value  OFF

### Generated text

Edit

Preview

Value  Patient  Date  Date & Time  Field Date  Field Date & Time

Header  Subheader  Bold  Italic  Underline  x<sub>2</sub>  x<sup>2</sup>

Pt Demogr  Service  Date & Time  System Vitals  Custom Vitals  Custom Pt Demogr

You can fill out the text here if you would like it to populate on the note.

Billing Profile

Clinical codes

Code System	Code	Description	
ICD-10	<input type="text" value="Search"/>		<input type="button" value="✕ Remove"/>
			<input type="button" value="+ Add New ^"/>

2. Click **Update Field** when you have added all the codes you need.

## Edit Field



Label Name  Try to keep it short!

Required field

Spacing within note  New Line  New Paragraph  Smart Field

Default value  OFF

---

**Generated text**

---

Billing Profile

Clinical codes

Code System	Code	Description	
ICD-10	J03.01	Acute recurrent streptococcal tonsillitis	<input type="button" value="Remove"/>
CPT	3210F	GRP A STREP TEST PERFORMED	<input type="button" value="Remove"/>
CPT	99213	OFFICE/OUTPATIENT VISIT EST	<input type="button" value="Remove"/>

3. Once activated, the switch will populate the codes in the billing section. If the switch is deactivated, the codes will be removed from the billing.

## Adding Codes to Single and Multiple Select Fields

The process for adding clinical codes to **Single Select** and **Multiple Select** fields is the same.

With a single select field, you can choose one code from the list you create. Whereas with a multiple-select field, you can choose more than one code from the list you create.

1. After adding the **Allowed Values** and your codes in the **Clinical Codes** section, you can connect the values and codes by selecting the relevant value from the **Options** dropdown.

2. Click **Update Field** when finished.

### Single Select

## Edit Field

✕

Label Name  Try to keep it short!

Required field

Allowed Values	
<input type="text" value="Insomnia"/>	<input type="button" value="Move"/> <input type="button" value="Default"/> <input type="button" value="Remove"/>
<input type="text" value="Circadian Sleep Rhythm Disorder"/>	<input type="button" value="Move"/> <input type="button" value="Default"/> <input type="button" value="Remove"/>
<input type="text" value="Narcolepsy without Cataplexy"/>	<input type="button" value="Move"/> <input type="button" value="Default"/> <input type="button" value="Remove"/>
<input type="text" value="Narcolepsy with Cataplexy"/>	<input type="button" value="Move"/> <input type="button" value="Default"/> <input type="button" value="Remove"/>

Spacing within note  New Line  New Paragraph

---

**Generated text**

`<b>Diagnosis: </b> {{(value)}}.`

---

Billing Profile

Clinical codes

Code System	Code	Description	Option	
ICD-10	G47.00	Insomnia, unspecified	<input type="text" value="Insomnia"/>	<input type="button" value="Remove"/>
ICD-10	G47.20	Circadian rhythm sleep disorder, unspecified type	<input type="text" value="Circadian Sleep Rhythm Disorder"/>	<input type="button" value="Remove"/>
ICD-10	G47.419	Narcolepsy without cataplexy	<input type="text" value="Insomnia"/> <input type="text" value="Circadian Sleep Rhythm Disorder"/> <input type="text" value="Narcolepsy without Cataplexy"/>	<input type="button" value="Remove"/>
ICD-10	G47.411	Narcolepsy with cataplexy	<input checked="" type="checkbox"/> <input type="text" value="Narcolepsy with Cataplexy"/>	<input type="button" value="Remove"/>

## Multiple Select

## Edit Field

Allowed Values		Move	Default	Remove
	Unspecified Depression			
	Adjustment Disorder - Depressed			
	MDD, Recurrent, Mild			
	MDD, Recurrent, Moderate			
	MDD, Recurrent Severe without Psychosis			

+ Add option

Spacing within note  New Line  New Paragraph

### Generated text

Edit

Preview

Value Patient Date Date & Time Field Date Field Date & Time

Header Subheader Bold Italic Underline x<sub>2</sub> x<sup>2</sup>

Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr

<b>Diagnosis: </b> {{value}}.

Billing Profile (None)

Clinical codes

Code System	Code	Description	Option	
ICD-10	F32.9	Major depressive disorder, single episode, unspecified	Unspecified Depression	Remove
ICD-10	F43.21	Adjustment disorder with depressed mood	Adjustment Disorder - Depressed	Remove
ICD-10	F33.0	Major depressive disorder, recurrent, mild	MDD, Recurrent, Mild	Remove
ICD-10	F33.1	Major depressive disorder, recurrent, moderate	MDD, Recurrent, Moderate	Remove

Cancel Update field

Codes populated by the **Single Select** option and the **Multiple Select** options of a specific form will also appear in the billing section form.