

# Adding Clinical Codes to Forms

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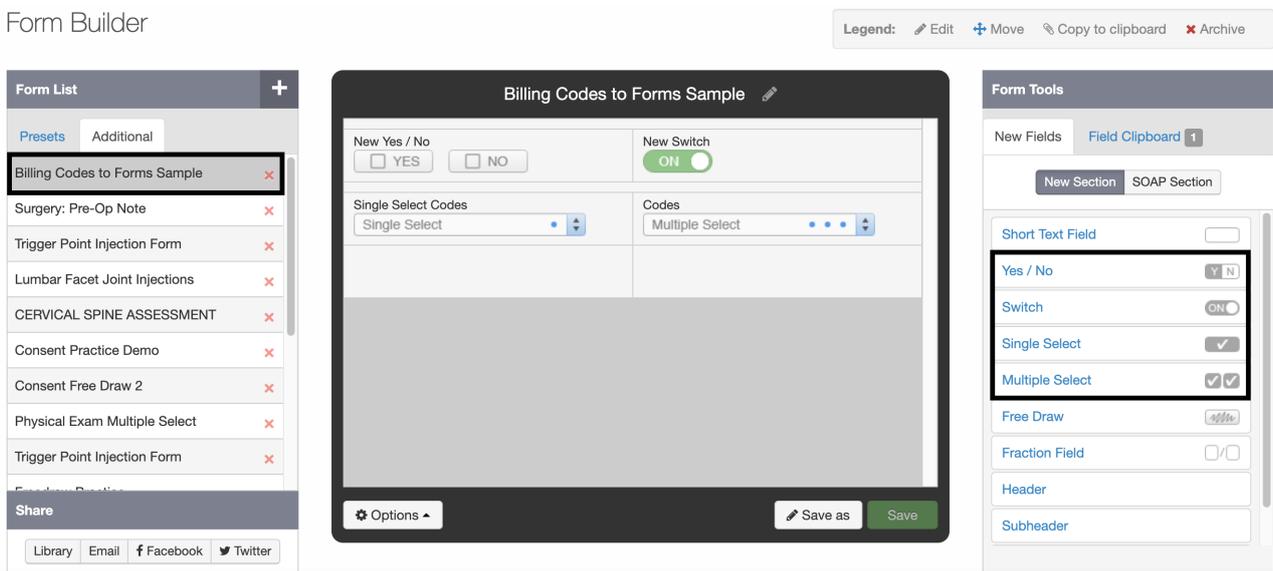
You can connect clinical codes (ICD-10, CPT, HCPCS, and custom codes) to form/template fields so they populate billing information while completing your clinical note. You can add codes to the following fields:

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

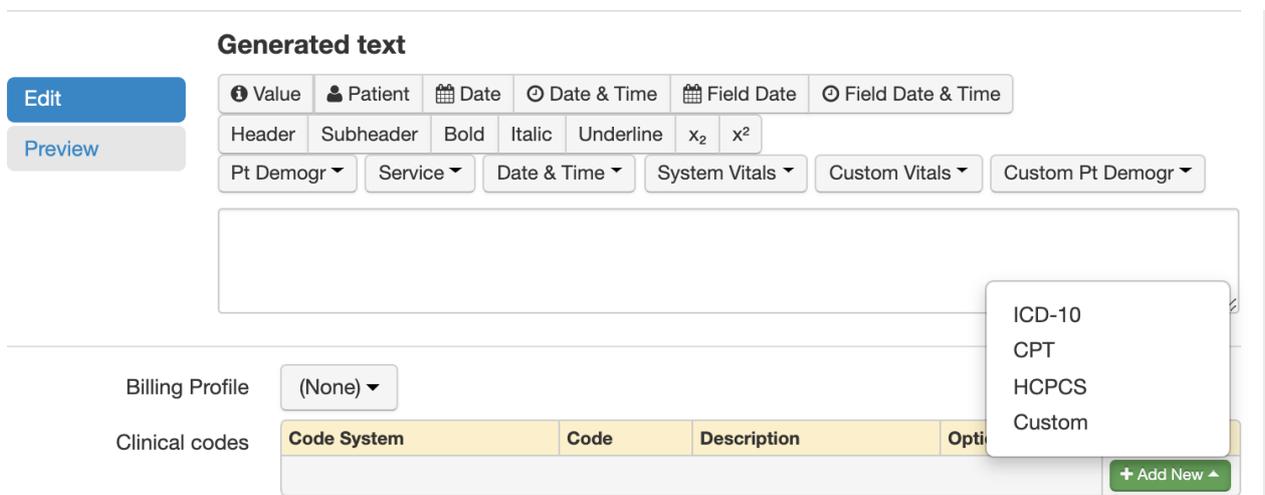
Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

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**.



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.

CPT   ✖ Remove

## 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**

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 ▾	✖ Remove
CPT	99213	OFFICE/OUTPATIENT VISIT EST	Yes ▾	✖ Remove
ICD-10	Z00.01	Encounter for general adult medical examination with abnormal findings	No ▾	✖ Remove
CPT	99213	OFFICE/OUTPATIENT VISIT EST	No ▾	✖ Remove
				+ 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

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**Generated text**

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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

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### Generated text

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

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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		<input type="radio"/>	<input type="button" value="Remove"/>
	Adjustment Disorder - Depressed		<input type="radio"/>	<input type="button" value="Remove"/>
	MDD, Recurrent, Mild		<input type="radio"/>	<input type="button" value="Remove"/>
	MDD, Recurrent, Moderate		<input type="radio"/>	<input type="button" value="Remove"/>
	MDD, Recurrent Severe without Psychosis		<input type="radio"/>	<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	F32.9	Major depressive disorder, single episode, unspecified	Unspecified Depression	<input type="button" value="Remove"/>
	ICD-10	F43.21	Adjustment disorder with depressed mood	Adjustment Disorder - Depressed	<input type="button" value="Remove"/>
	ICD-10	F33.0	Major depressive disorder, recurrent, mild	MDD, Recurrent, Mild	<input type="button" value="Remove"/>
	ICD-10	F33.1	Major depressive disorder, recurrent, moderate	MDD, Recurrent, Moderate	<input type="button" value="Remove"/>

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