Adding Clinical Codes to Forms

Last modified on 01/12/2026 3:54 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.

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.

Generated text

Edit

Preview

| ❶ Value | 👤 Patient | 📅 Date | 🕐 Date & Time | 📅 Field Date | 🕐 Field Date & Time |

| Header | Subheader | Bold | Italic | Underline | x₂ | x² |

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

ICD-10
CPT
HCPCS
Custom

Billing Profile   (None) ▾

Clinical codes

Code System	Code	Description	Opti...

+ Add New ▲

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	Search	▾	✖ 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

Edit
Preview

ℹ Value | 👤 Patient | 📅 Date | ⏱ Date & Time | 📅 Field Date | ⏱ Field Date & Time

Header | Subheader | Bold | Italic | Underline | x_2 | x^2

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 | Strep | 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 | x₂ | x² |

| 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 | (None) ▾

Clinical codes

Code System	Code	Description	
ICD-10	Search		✖ Remove
			➕ Add New ▲

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

Edit Field

Label Name	Strep	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 | x₂ | x² |

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

Billing Profile   (None) ▾

Clinical codes

Code System	Code	Description	
ICD-10	J03.01	Acute recurrent streptococcal tonsillitis	✖ Remove
CPT	3210F	GRP A STREP TEST PERFORMED	✖ Remove
CPT	99213	OFFICE/OUTPATIENT VISIT EST	✖ Remove
			➕ Add New ▲

✖ Cancel   ✔ Update field

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	Sleep Disorder	Try to keep it short!
	☐ Required field	

Allowed Values

Insomnia	Move	⊖ Default	✖ Remove
Circadian Sleep Rhythm Disorder	Move	⊖ Default	✖ Remove
Narcolepsy without Cataplexy	Move	⊖ Default	✖ Remove
Narcolepsy with Cataplexy	Move	⊖ Default	✖ Remove

+ Add option

Spacing within note   ☐ New Line   ☐ New Paragraph

Generated text

Edit
Preview

❶ Value	👤 Patient	📅 Date	⏲ Date & Time	📅 Field Date	⏲ Field Date & Time
Header	Subheader	Bold	Italic	Underline	x₂ x²

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

Diagnosis: {{value}}.

Billing Profile   (None) ▾

Clinical codes

Code System	Code	Description	Option	
ICD-10	G47.00	Insomnia, unspecified	Insomnia ⌄	✖ Remove
ICD-10	G47.20	Circadian rhythm sleep disorder, unspecified type	Circadian Sleep Rhythm Disorder ⌄	✖ Remove
			Insomnia	
			Circadian Sleep Rhythm Disorder	
			Narcolepsy without Cataplexy	
ICD-10	G47.419	Narcolepsy without cataplexy	✓ Narcolepsy with Cataplexy	✖ Remove
ICD-10	G47.411	Narcolepsy with cataplexy		✖ Remove

+ Add New ▲

Cancel   **✔ Update field**

Multiple Select

Edit Field

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

+ 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   x₂   x²

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

Diagnosis: {{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.