Setting a Workflow Form

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> ℹ️ 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.

Setting a form as workflow allows you to replace the content under the Preset forms with a form you have under the Additional tab by setting it as workflow.
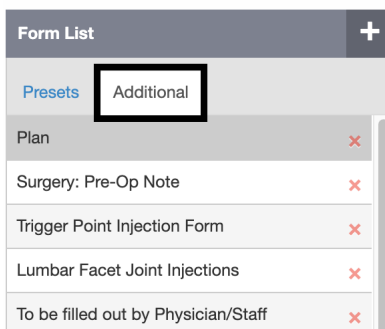
DrChrono comes with many prebuilt templates for H&P and SOAP notes. You can replace these default templates by setting a custom form that you've built as a workflow form. To do so follow these steps.

1. Go to **Clinical** > **Form Builder**.
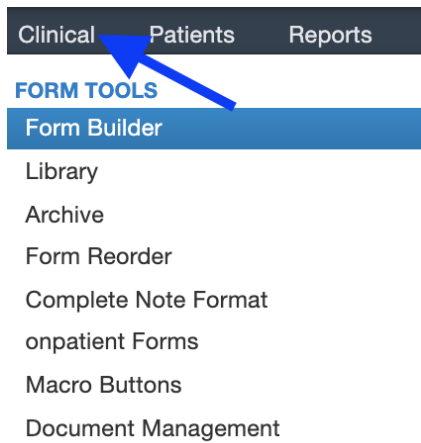
2. Click on the **Additional** tab and select the form you would like to take the place of the H&P, SOAP, or OnPatient forms.

3. Once you have chosen the form, go to **Options** > **Set as Workflow Form**. Next, select the preset form you would like to replace. In the example below, we are setting the 'Plan' form under the Additional tab as the 'H&P Plan

Form Builder

Legend: ✏

Form List +

Presets | Additional

Plan ✕

Surgery: Pre-Op Note ✕

Trigger Point Injection Form ✕

Lumbar Facet Joint Injections ✕

To be filled out by Physician/Staff ✕

CERVICAL SPINE ASSESSMENT ✕

Consent Practice Demo ✕

Consent Free Draw 2 ✕

Physical Exam Multiple Select ✕

Trigger Point Injection Form ✕

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Plan ✏

Medications
ON

Continue current medication regime
ON

Name

	H&P CC / History of Present Illness
Make Form Persistent	H&P Med / Fam / Social History
Hide Form Name Header	H&P Review of Systems
Set as Default Form	H&P Physical Exam
Exclude from Complete Note	H&P Assessment
	H&P Plan
Rename Form	SOAP Subjective
Duplicate Form	SOAP Objective
	SOAP Assessment
Set as Workflow Form ▶	SOAP Plan
	onpatient Additional Info
Clear Form	onpatient Reasons For Visit
Archive Form	

Warning: This form is very large! Consider splitting it into multiple smaller forms.

⚙ Options ▲

✏ Save as | Save

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4. Once the form has been set as workflow, you can see it under the Preset forms.

Form Builder

Legend: ✏

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 D

SOAP Objective

SOAP Assessment

SOAP Plan

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H&P Plan

Medications
ON

Continue current medication regime
ON

Name | Dose

Frequency | Refill

Discontinue Following medication
ON

Name | Dose

Frequency

Warning: This form is very large! Consider splitting it into multiple smaller forms.

⚙ Options ▲

✏ Save as | Save

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5. You will also see the Preset form you replaced under the Additional tab.

6. If you would like to return the form you set as a workflow to the original Preset form, select the form, go to the **Options** menu, and select **Reset to Default**.