

Setting a Workflow Form

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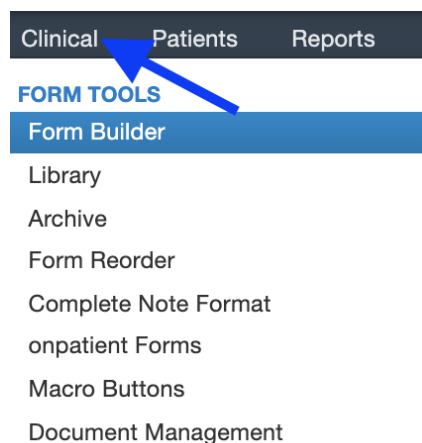
Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to [Clinical Form Management](#). For more details and answers to common questions, please refer to our [FAQ](#) article.

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.

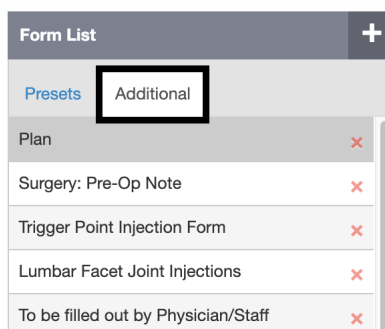
Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

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



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

Form Builder



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

The screenshot shows the 'Form Builder' interface. On the left, the 'Form List' panel has a 'Presets' tab selected. The 'Plan' form is highlighted in the list. On the right, the 'Plan' form is displayed in a preview mode. A context menu is open over the 'Plan' form, showing options like 'Make Form Persistent', 'Hide Form Name Header', 'Set as Default Form', 'Exclude from Complete Note', 'Rename Form', 'Duplicate Form', 'Set as Workflow Form', 'Clear Form', and 'Archive Form'. The 'Set as Workflow Form' option is selected, and a sub-menu is open showing various form types, with 'H&P Plan' highlighted. A warning message at the bottom right states: 'Warning: This form is very large! Consider splitting it into multiple smaller forms.'

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


Form Builder


The screenshot shows the 'Form Builder' interface. On the left, the 'Form List' panel has a 'Presets' tab selected. The 'H&P Plan' form is highlighted in the list. On the right, the 'H&P Plan' form is displayed in a preview mode. The form contains sections for 'Medications' and 'Discontinue Following medication', each with a toggle switch. There are also input fields for 'Name', 'Dose', 'Frequency', and 'Refill'. A warning message at the bottom right states: 'Warning: This form is very large! Consider splitting it into multiple smaller forms.'


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


Form Builder


Legend: 


Form List 


Presets **Additional** 


H&P Plan (Replaced at 07-15-2020 15:27:12) 


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 


Share


Library

Email


 Facebook

 Twitter


H&P Plan (Replaced at 07-15-2020 15:27:12) 

Labs
Multiple Select 


Lab Comments

Radiology
Multiple Select 

Radiology Comments

PT Recommendations
Single Select 


PT Recommendation Comments

Home Health
Multiple Select 


Home health comments

Referrals



Referral Comments


Education
Single Select 

Education Comments

Diet
Single Select 

Diet Comments

 Options 


 Save as

Save

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**.

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 

SOAP Objective


SOAP Assessment


SOAP Plan

Share

Library

Email

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 Twitter

H&P Plan

Medications
☒ ON

Continue current medication regime
☒ ON

Name

Dose

Frequency


Refill

Make Form Persistent

Hide Form Name Header

Set as Default Form



Exclude from Complete Note


Reset to Default 

Duplicate Form

Clear Form

Dose

 Options 

 Save as

Save

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