

# Setting a Workflow Form

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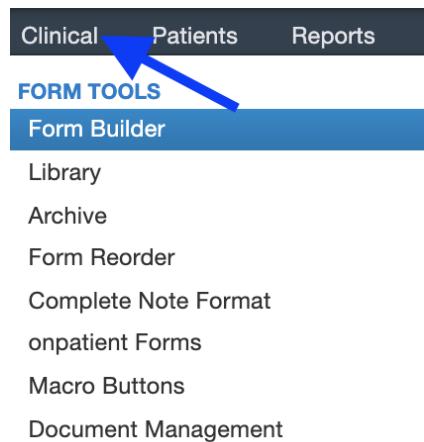
Beginning in **February 2026**, we will start retiring the legacy Form Builder as part of the transition to Clinical Form Management. For more details and answers to common questions, please refer to our [FAQ article](#).

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.

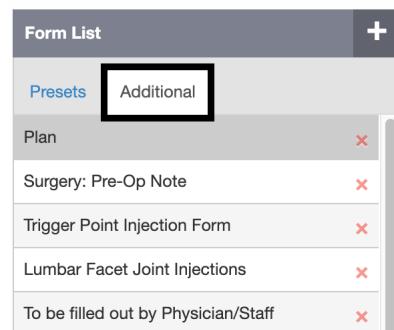
Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

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' sidebar has a 'Presets' tab selected, showing a list of forms including 'Plan', 'Surgery: Pre-Op Note', 'Trigger Point Injection Form', etc. On the right, the main 'Plan' form is displayed with a context menu open over the 'Plan' form entry. The menu includes 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' (which is highlighted in blue), 'Clear Form', and 'Archive Form'. A yellow box highlights the 'Options' button at the bottom of the menu. A warning message at the bottom right of the form area says: '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' sidebar has an 'Additional' tab selected, showing a list of forms including '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', and 'H&P Plan'. On the right, the main 'H&P Plan' form is displayed. A yellow box highlights the 'H&P Plan' tab at the top of the form. A warning message at the bottom right of the form area says: '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 

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**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

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**H&P Plan**

Medications	
Continue current medication regime	
Name	Dose
Frequency	Refill

 Options 

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

 Save as  Save

- Make Form Persistent
- Hide Form Name Header
- Set as Default Form
- Exclude from Complete Note
- Reset to Default** 
- Duplicate Form
- Clear Form