

# Setting a Workflow Form

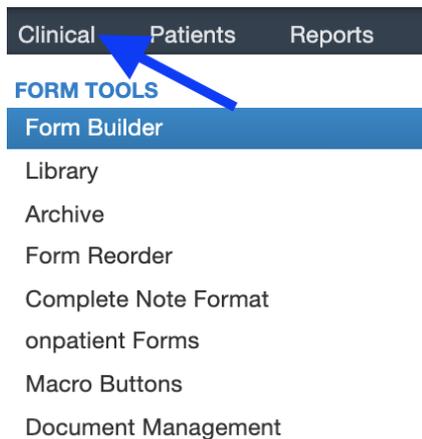
Last modified on 02/23/2026 1:38 pm EST

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.

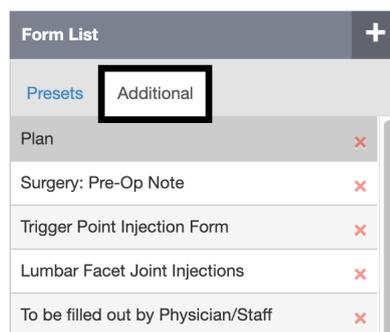
Before building your form, we recommend reviewing [Best Practices for Building Custom Forms](#) designed to help you make the most of the clinical notes feature.

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

Legend:

The Form List sidebar has two tabs: 'Presets' and 'Additional'. Under the 'Presets' tab, the 'Plan' form is highlighted with a black border. Below it are other forms like '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', and 'Trigger Point Injection Form'. At the bottom, there is a 'Share' section with buttons for 'Library', 'Email', 'Facebook', and 'Twitter'.

The main editor area shows the 'Plan' form. A context menu is open over the 'Plan' form, listing various actions: '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 highlighted in blue, and an arrow points to it. A sub-menu is also visible, listing form types: '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' (highlighted in blue), 'SOAP Subjective', 'SOAP Objective', 'SOAP Assessment', 'SOAP Plan', 'onpatient Additional Info', and 'onpatient Reasons For Visit'. A yellow box highlights the 'Options' button at the bottom left. A warning message at the bottom right states: 'Warning: This form is very large! Consider splitting it into multiple smaller forms.' Buttons for 'Save as' and 'Save' are at the bottom right.

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

# Form Builder

Legend:

The Form List sidebar now shows the 'Presets' tab selected. The 'H&P Plan' form is highlighted with a black border. Other forms listed include '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', 'SOAP Subjective', 'SOAP Objective', 'SOAP Assessment', and 'SOAP Plan'. The 'Share' section at the bottom remains the same.

The main editor area now shows the 'H&P Plan' form. The title 'H&P Plan' is highlighted with a yellow box. The form contains fields for 'Medications' (with an 'ON' toggle), 'Continue current medication regime' (with an 'ON' toggle), 'Name' and 'Dose' input fields, 'Frequency' and 'Refill' input fields, and 'Discontinue Following medication' (with an 'ON' toggle). Below this, there are more 'Name' and 'Dose' input fields, and a 'Frequency' input field. A warning message at the bottom right states: 'Warning: This form is very large! Consider splitting it into multiple smaller forms.' Buttons for 'Options', 'Save as', and 'Save' are at the bottom.

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 Facebook Twitter

H&P Plan

Medications

Continue current medication regime

Name  Dose

Frequency  Refill

Dose

Options

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

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

Save as Save