

Making a Form Persistent

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Making a form persistent allows you to automatically copy the information entered for a patient in a specific form for all their future visits once it has been entered in the clinical note.

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.



Making a form persistent will not make any changes to signed and locked notes.

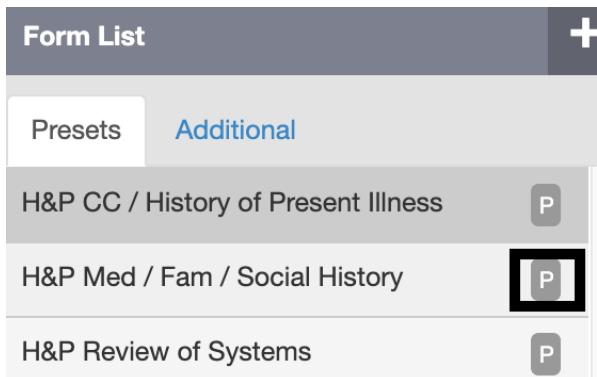
1. Go to Clinical > Form Builder.

The screenshot shows the Clinical navigation bar with tabs for Clinical, Patients, Reports, and Billing. Below the Clinical tab, a sidebar titled 'FORM TOOLS' is open, showing the 'Form Builder' option, which is highlighted with a blue background. Other options in the sidebar include Form Builder (beta), Tag Management, Library, Archive, Archive (beta), Form Reorder, Complete Note Format, Outpatient Forms, Macro Buttons, and Document Management.

2. Select the form you wish to mark as persistent, click Options, and choose Make Form Persistent from the menu.

The screenshot shows the 'Form List' on the left and a detailed view of the 'H&P Med / Fam / Social History' form on the right. The 'Form List' shows various forms like H&P CC / History of Present Illness, H&P Med / Fam / Social History (which is selected and highlighted with a black box), H&P Review of Systems, etc. The 'H&P Med / Fam / Social History' form has several fields: Medical History (ON), Past Medical History (Multiple Select), Past Surgical History (Multiple Select), Childhood illnesses, and PCP Contact Information. A context menu is open over the 'Childhood illnesses' field, with 'Make Form Persistent' highlighted and a yellow box. Other options in the menu include Hide Form Name Header, Set as Default Form, Exclude from Complete Note, Reset to Default, Duplicate Form, and Clear Form. The 'Options' button at the bottom of the menu is also highlighted with a yellow box.

3. Once the form is persistent, you will see a letter 'P' next to the template name.



The screenshot shows a 'Form List' interface with a dark header bar containing the text 'Form List' and a white '+' icon. Below the header, there are two tabs: 'Presets' (selected) and 'Additional'. The main area displays three form entries, each with a small circular icon containing a letter 'P' to its right, indicating it is a persistent form. The entries are: 'H&P CC / History of Present Illness', 'H&P Med / Fam / Social History' (with the 'P' icon highlighted with a black box), and 'H&P Review of Systems'.

Form Name	Persistent Status
H&P CC / History of Present Illness	P
H&P Med / Fam / Social History	P
H&P Review of Systems	P

If you would like to undo the persistent setting for a form, follow the same steps and select **Make Form Not-Persistent** from the options menu.
