

How to Build OnPatient Forms

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Beginning **February 2 through February 24**, 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.

[Legacy Form Builder Sunset](#)

You can customize your own forms for patients to fill out through OnPatient or the Check-In App through the Form Builder in DrChrono.

Building templates for OnPatient follows the same process as building a clinical form by using the same field types and form tools. The forms can be built into the **OnPatient Additional Info** and/or **OnPatient Reasons for Visit** forms. You can also build a template under the **Additional** tab and **set it as a workflow form** under **OnPatient Additional Info** and/or **OnPatient Reasons for Visit**.

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 Tools > Clinical Form Management**.

The screenshot shows the DrChrono navigation bar at the top with links for Clinical, Patients, Reports, and Billing. Below this is a sidebar menu under the heading 'FORM TOOLS'. The 'Clinical Form Management' link is highlighted with a red box. Other items in this section include Library, Archive, Archive (beta), Form Reorder, Form Builder, Complete Note Format, onpatient Forms, Macro Buttons, and Document Management. Below this is a section titled 'CLINICAL' containing links for Clinical Notes, Audit Log, DSI Rules, Inventory Management, and Patient Education Management. At the bottom is a section titled 'MU REPORTING' with links for Meaningful Use Certification Edition 2015, MIPS/MACRA, Clinical Quality Measures, and CQM Value Set.

2. Search **OnPatient Additional Info** or **OnPatient Reasons for Visit**.

Name	Tag
<input type="text" value="onpatient"/>	<input type="text" value="Search by ta..."/>
Action	
onpatient Additional Info	10/18/2022 Edit View ...
onpatient Reasons For Visit	01/04/2021 Edit View ...
Showing 2 of 2 records	

3. Start customizing the form and adding the fields specific to your practice. You can keep, modify, or delete the existing fields as needed.

For more information about building forms in DrChrono, visit our [Clinical Form Management](#) article.
