Setting a Form as a Default Template

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> ℹ️ 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.

Setting a form as your default template allows the system to automatically direct you to this template when you access the clinical note section. This streamlines your workflow and saves you time by eliminating the need to manually select your preferred template each time.

Without a default form set, accessing the clinical note section will automatically direct you to the CC/History of Present Illness template.

To change the default form:

1. Go to **Clinical** > **Form Builder**.
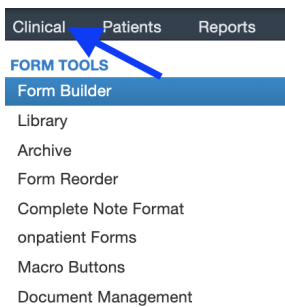
2. Select the form you wish to set as default and click on **Options** and choose **Set as Default Form** from the menu.

3. Once the form is **Set as Default**, you will see the letter '**D**' next to the form name.

If you would like to undo the default setting for a form, follow the same steps and select **Remove Default Status** from the options menu or set a different form as default.