

Setting a Form as a Default Template

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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.

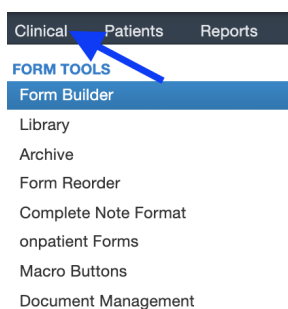
Setting a form as your default template allows the system to automatically direct you to this template when you access the clinical note section. This streamlines your workflow and saves you time by eliminating the need to manually select your preferred template each time.

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.

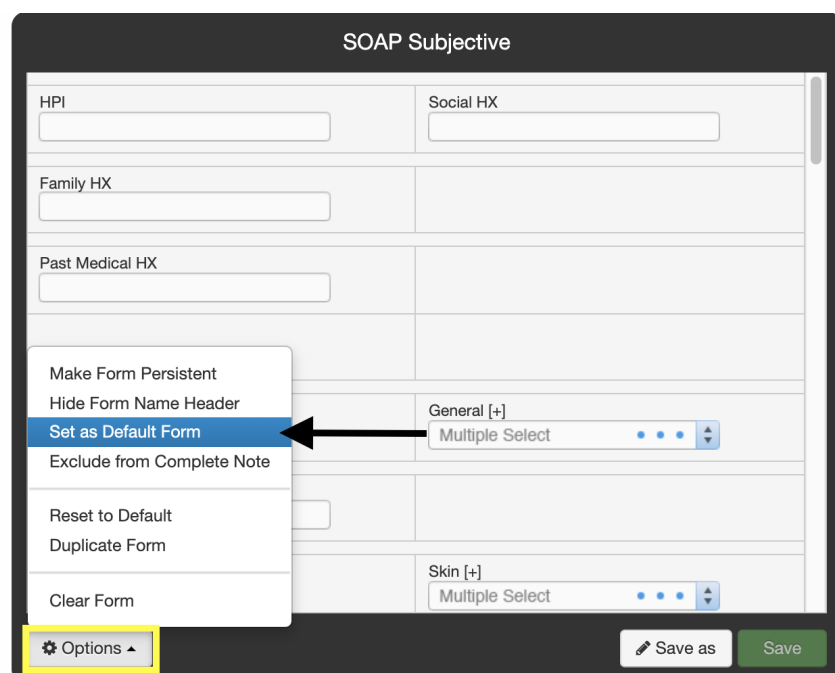
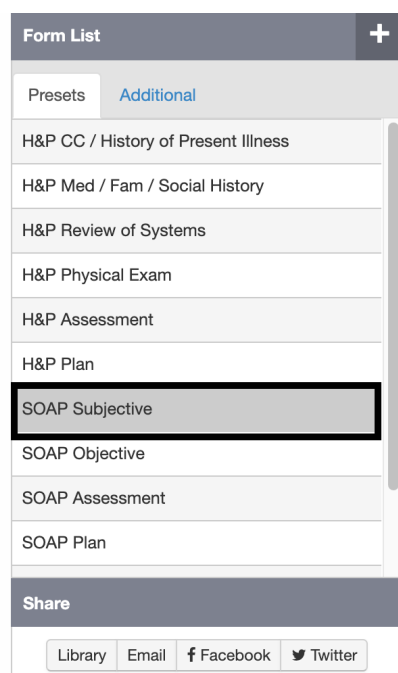
Without a default form set, accessing the clinical note section will automatically direct you to the CC/History of Present Illness template.

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.

SOAP Subjective

D

SOAP Objective

SOAP Assessment

SOAP Plan

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.