

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](#).

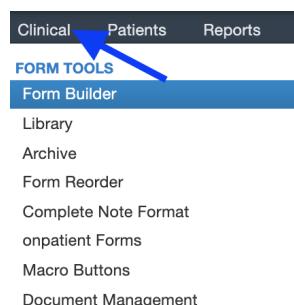
Setting a form as your default template allows the system to automatically direct you to this template when you access the clinical note section. This streamlines your workflow and saves you time by eliminating the need to manually select your preferred template each time.

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.

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 f Facebook t Twitter

SOAP Subjective

HPI Social HX

Family HX

Past Medical HX

Make Form Persistent

Hide Form Name Header

Set as Default Form

Exclude from Complete Note

Reset to Default

Duplicate Form

Clear Form

General [+] Multiple Select

Skin [+] Multiple Select

Options

Save as Save

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

SOAP Subjective	
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.
