

Last modified on 01/12/2026 4:09 pm EST

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](#).

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.

To have the field generate text in your clinical note, type the text you would like to show up in the 'Generated Text' box. This text can draw upon information in the patient's chart and populate your notes with that information. The most common variable is the **Value** field, denoted by the text {{value}}. This draws upon the information that was entered in your charting template.

×

Edit

Preview

Generated text

Value	Patient	Date	Date & Time	Field Date	Field Date & Time
-------	---------	------	-------------	------------	-------------------

Header	Subheader	Bold	Italic	Underline	x_2	x^2
--------	-----------	------	--------	-----------	-------	-------

Pt Demogr ▼	Service ▼	Date & Time ▼	System Vitals ▼	Custom Vitals ▼	Custom Pt Demogr ▼
-------------	-----------	---------------	-----------------	-----------------	--------------------

```
Patient Name: {{first_name}} {{last_name}}
DOS: {{datetime}}
Referred by: {{value}}
```

Several variables can pull information to the clinical note, indicated by a surrounding double bracket {{**variable_name**}}. By clicking the available variables, the text associated with that variable will automatically be entered into the text box. This can be customized any way you like.

Edit Field

Label Name: Try to keep it short!

☐ Wide field ☐ Required field

Spacing within note: ☐ New Line ☐ New Paragraph

Default value:

Generated text

Edit **Preview**

Value Patient Date Date & Time Field Date Field Date & Time

Header Subheader Bold Italic Underline x₂ x²

Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr

Patient Name:

DOS:

Referred by:

Billing Profile: (None)

Clinical codes

Code	Description	Units

[+ Add New](#)

[Cancel](#) [Update field](#)

Edit Field

Label Name: Try to keep it short!

☐ Wide field ☐ Required field

Spacing within note: ☐ New Line ☐ New Paragraph

Default value:

Generated text

Edit **Preview**

Value Patient Date Date & Time Field Date Field Date & Time

Header Subheader Bold Italic Underline x₂ x²

Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr

Patient Name:

DOS:

Referred by:

Billing Profile: (None)

Clinical codes

Code System	Code	Description	Units

[+ Add New](#)

[Cancel](#) [Update field](#)

When you add information in the template, the clinical note will insert the values collected by the `{{value}}` field into your clinical note. In this example, the name of the referral was entered into the template. The patient's first and last name and the date and time were populated based on information in the patient's chart and appointment information.

Yes ☒ Include in Note

Referral Name:

Family Practice

Patient: Sample Patient **DOB:** 11/05/1991 **Sex:** M

Provider: **Visit:** 12/03/2021 2:00PM **Chart:** PASA000010

Office: Eastern Office **Address:** 225 Schilling Circle, Hunt Valley, MD, 21031

New Clinical Form:

Patient Name: Sample Patient

DOS: 12/03/2021 02:00PM

Referred by: James Smith

Edit Field

Label Name: Try to keep it short!

☐ Wide field ☐ Required field

Spacing within note: ☐ New Line ☐ New Paragraph

Default value:

Generated text

Edit **Preview**

Value Patient Date Date & Time Field Date Field Date & Time

Header Subheader Bold Italic Underline x₂ x²

Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr

Patient Name:

DOS:

Referred by:

Billing Profile: (None)

Clinical codes

Code System	Code	Description	Units

[+ Add New](#)

[Cancel](#) [No changes](#)