Form Builder: How do I customize form fields?

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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.

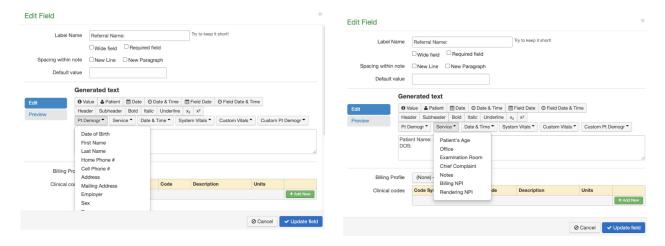
After you're done creating your form, think about how you would like your clinical note to look. The order of the clinical note sections does not need to mirror your form, you can reorder the sections in the Complete Note Format editor (Clinical > Complete Note Format).

Now, begin by clicking on each field. This will bring up the Edit Field box.

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. This draws upon the information that was entered in your charting template.

Edit Field		×
Labe	Name Referral Name: Try to keep it short!	
	☐ Wide field ☐ Required field	
Spacing with	note New Line New Paragraph	
Defau	value	
	Generated text	
Edit	● Value	
Preview	Header Subheader Bold Italic Underline x ₂ x ²	
1 TOVIOW	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. 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.



When you add information in the template, the clinical note will insert the values collected by the 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.

