

Form Builder: How do I customize form fields?

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](#).

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 \(Clinical > Complete Note Format\)](#).

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.

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 `{{value}}`. This draws upon the information that was entered in your charting template.

Edit Field

Label Name: Referral Name: Try to keep it short!

Wide field Required field

Spacing within note New Line New Paragraph

Default value:

Generated text

Edit **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: Referral 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

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

Date of Birth
First Name
Last Name
Home Phone #
Cell Phone #
Address
Mailing Address

Code	Description	Units
		<input type="button" value="Add New"/>

Edit Field

Label Name: Referral 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

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

Patient Name: Patient's Age
DOS: Office
Examination Room
Chief Complaint
Notes
Billing Profile: (None) Billing NPI
Clinical codes: Code System Code Description Units

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.

Include in Note

Yes

Referral Name:
James Smith

Family Practice
Patient: Sample Patient
Provider:
Office: Eastern Office

DOB: 11/05/1991 Sex: M
Visit: 12/03/2021 2:00PM Chart: PASA000010
Address: 225 Schilling Circle, Hunt Valley, MD, 21031

Edit Field

Label Name: Referral 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

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

Patient Name: {{first_name}} {{last_name}}
DOS: {{datetimel}}
Referred by: {{value}}

Billing Profile: (None)
Clinical codes: Code System Code Description Units

New Clinical Form:
Patient Name: Sample Patient
DOS: 12/03/2021 02:00PM
Referred by: James Smith