

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 ✕

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 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. 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 x₂ x²

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

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

Code	Description	Units

[+ 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 x₂ x²

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

Patient Name: Patient's Age
DOS: Office
Examination Room
Chief Complaint
Notes
Billing NPI
Rendering NPI

Code System	Code	Description	Units

[+ Add New](#)

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.

Yes No **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: 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 x₂ x²

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

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

Billing Profile: (None)

Code System	Code	Description	Units

[+ Add New](#)