

How do I use Switches as Smart Fields?

Last modified on 01/12/2026 3:48 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.

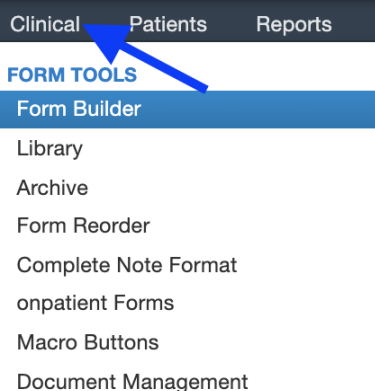
Smart fields are revealed when a switch is toggled to the ON position. A smart field aims to minimize clutter in your templates and easily trigger a natural procession of follow-up questions. Only Switches can made into smart fields.

Accessing Form Builder

Navigate to Clinical and select Form Builder



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.



Under the Form Tools, click the Switch field and then click where you want it to go on the form.

Form Tools

New Fields

Field Clipboard 4

New Section

SOAP Section

Short Text Field

Yes / No

Switch

Single Select

Multiple Select

Free Draw

Fraction Field

Header

Subheader

Click on the newly added switch field to bring up the field editor.

- Select the **Smart Field** checkbox to make this switch field a Smart Field.
- When you are done, select the **Update Field** button.
- At the bottom of the form builder, select **Save** to start associating other fields to the Smart Field.
- Add fields that you would like to be revealed when the switch is triggered by selecting the switch name from the **Parent Field** dropdown.

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Form Builder

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CERVICAL SPINE ASSESSMENT

Work/School Excuse Form

Share

Library

Email

Facebook

Twitter

Sample Switch Form *

Options

Undo Changes

Save as

Save

Form Tools

New Fields

Field Clipboard 4

New Section

SOAP Section

Short Text Field

Yes / No

Switch

Single Select

Multiple Select

Free Draw

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Repeat as necessary to make other Smart Fields.

Now when you flip the switch on your clinical note, all associated fields will appear for you to fill out. If you then set the switch as **OFF**, all the filled information in the associated fields will remain but the clinical note text that otherwise would generate, would not appear in your clinical note.

Creating a switch within the OnPatient Check-In form

Customizing the OnPatient Onboarding/Check-In Interface



It is important to note that, switch fields do not operate as required fields during patient check-in. Required switch fields are only validated as required when signing and locking the clinical note.