## How do I use Switches as Smart Fields?

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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.

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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.

## Navigate to Clinical and select Form Builder.

Clinical	Patients	Reports				
FORM TOOLS						
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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	YN			
Switch	ON			
Single Select	$\checkmark$			
Multiple Select				
Free Draw	MM			
Fraction Field	0/0			
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.



Repeat as necessary to make other Smart Fields.

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Form Builder					Legend: & Edit	🕂 Move 🛛 🗞 Copy to clipboa	rd X Archive
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Sample Switch Form	×	ON				New Section SO	AP Section
Medicare Annual Wellness	×	This goes with Field 1		This goes with field 1			
Injections	×					Short Text Field	
Allergy Shot	×					Yes / No	YN
Consent for Injection	×					Switch	GN
Lumbar Facet Joint Injections	×					Single Select	
Trigger Point Injection Form	×					Multiple Select	
CERVICAL SPINE ASSESSMENT	×					Free Draw	4000
Work/School Excuse Form	×					Fraction Field	0/0
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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.

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Schedule Clinical Patients Reports	Billing Account Marketplace Help 💲 🗙	Search 😒 🗐 🛨
H&P SOAP ADDITIONAL APPS	View Appointmen	t Quick History Copy Previous Note -
Preview Note Sample Switch Form	Sample Patient (Male   30 years   11/05/1991   PASA000010 ) Chief Complaint	Brendan Wilberton   11/29/2021
Medicare Annual Wellness	Primary Insurer: (60054) Aetna Health Plans	
Injections		
Allergy Shot		Vitals
Consent for Injection	No Include in Note *Ad	d to note" must be checked for this to render.
Lumbar Facet Joint Injections		
Trigger Point Injection Form	Smart Field 1	
CERVICAL SPINE ASSESSMENT	OFF	
Work/School Excuse Form	Smart Field 2	
Sample Form	OFF	
Billing Codes to Forms Sample	Notes Default Large X-Large	Macros -
Eye Exam	Horeo bellon raille v.raille	marco
Consent Practice Demo		

## 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.

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