

How do I use Switches as Smart Fields?

Last modified on 02/23/2026 1:35 pm EST

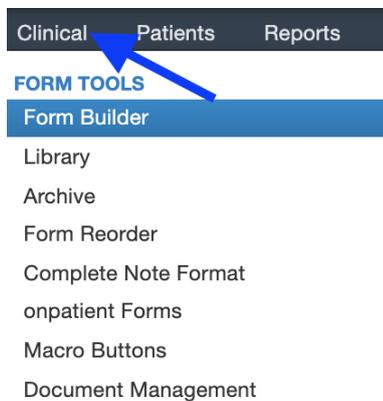
Smart fields are revealed when a switch is toggled to the ON position. A smart field aims to minimize clutter in your templates and easily trigger a natural procession of follow-up questions. Only Switches can be made into smart fields.

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.



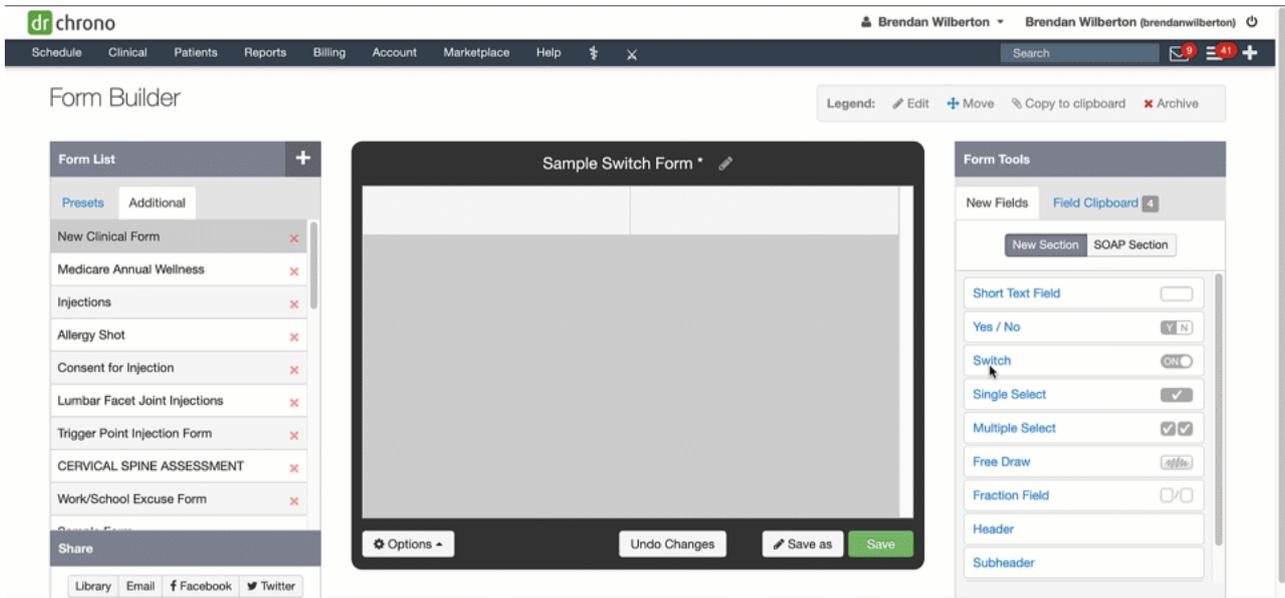
Under the Form Tools, click the Switch field and then click where you want it to go on the form.



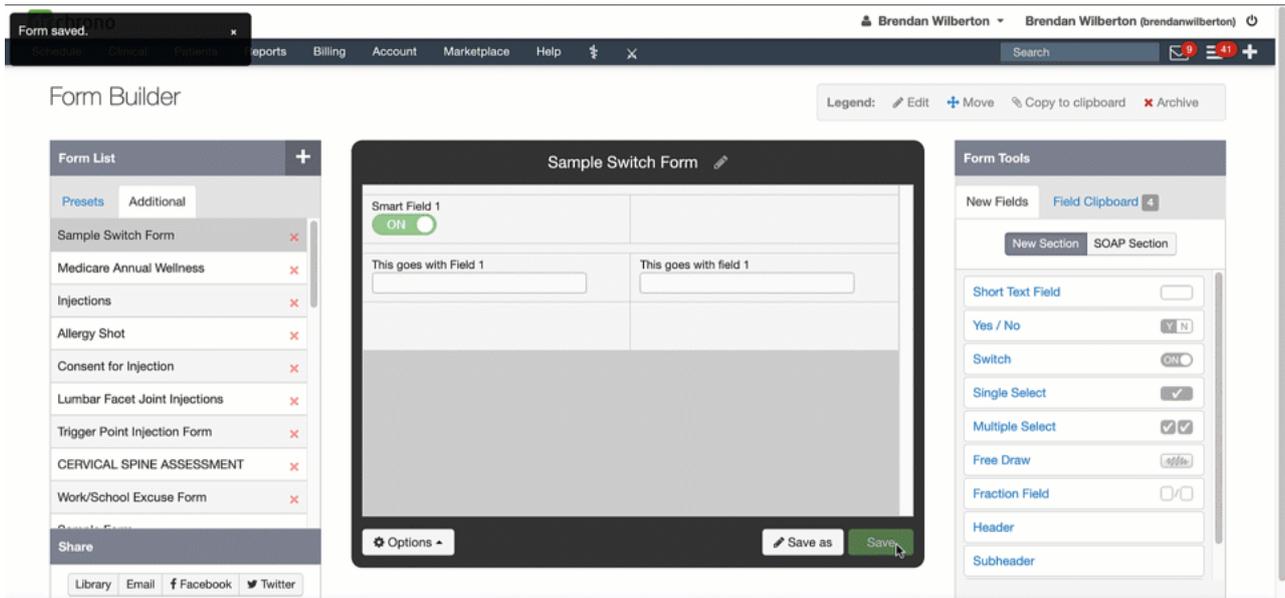
Click on the newly added switch field to bring up the field editor.

- 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.



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.

The screenshot displays the dr chrono patient interface. At the top, the user is logged in as Brendan Wilberton. The navigation menu includes Schedule, Clinical, Patients, Reports, Billing, Account, Marketplace, and Help. The patient profile for 'Sample Patient' (Male, 30 years, 11/05/1991, PASA000010) is shown, along with the date 11/29/2021. The interface includes a 'Preview Note' sidebar with various form options like 'Sample Switch Form', 'Medicare Annual Wellness', and 'Allergy Shot'. The main area shows a 'Chief Complaint' field and a 'Primary Insurer' field. Below this, there are buttons for 'Growth Charts', 'Vitals', 'Print section', and 'Fax section'. A toggle for 'Include in Note' is set to 'No'. Two 'Smart Field' sections are visible, both with 'OFF' toggle buttons. At the bottom, there is a 'Notes' section with 'Default', 'Large', and 'X-Large' options, and a 'Macros' dropdown.

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.