

# How do I use Switches as Smart Fields?

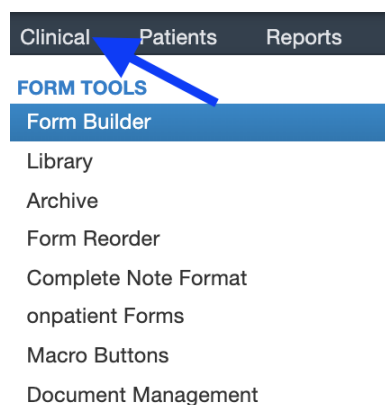
Last modified on 10/16/2024 1:18 pm EDT

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.



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.



**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  Y N
- Switch  ON**
- 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.

dr chrono

Brendan Wilberton | Brendan Wilberton (brendanwilberton)

Schedule Clinical Patients Reports Billing Account Marketplace Help

Form Builder

Legend: Edit Move Copy to clipboard Archive

Form List

- Presets Additional
- New Clinical Form
- Medicare Annual Wellness
- Injections
- Allergy Shot
- Consent for Injection
- Lumbar Facet Joint Injections
- Trigger Point Injection Form
- CERVICAL SPINE ASSESSMENT
- Work/School Excuse Form

Form Tools

New Fields **Field Clipboard** 4

New Section SOAP Section

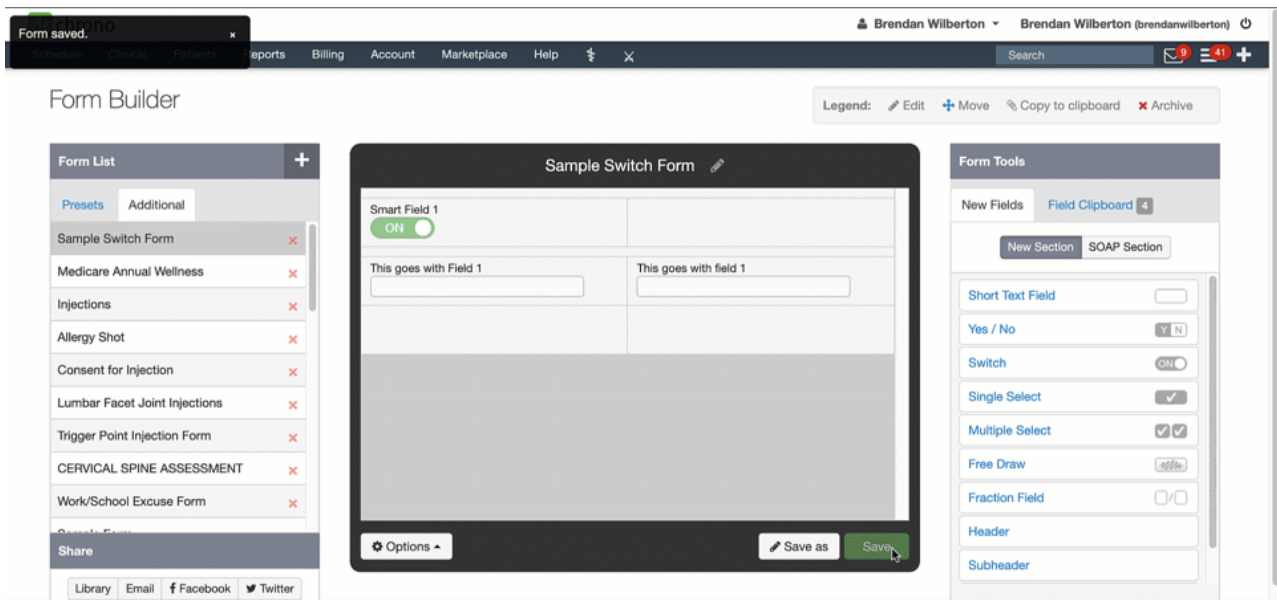
- Short Text Field
- Yes / No  Y N
- Switch  ON**
- Single Select
- Multiple Select
- Free Draw
- Fraction Field
- Header
- Subheader

Sample Switch Form

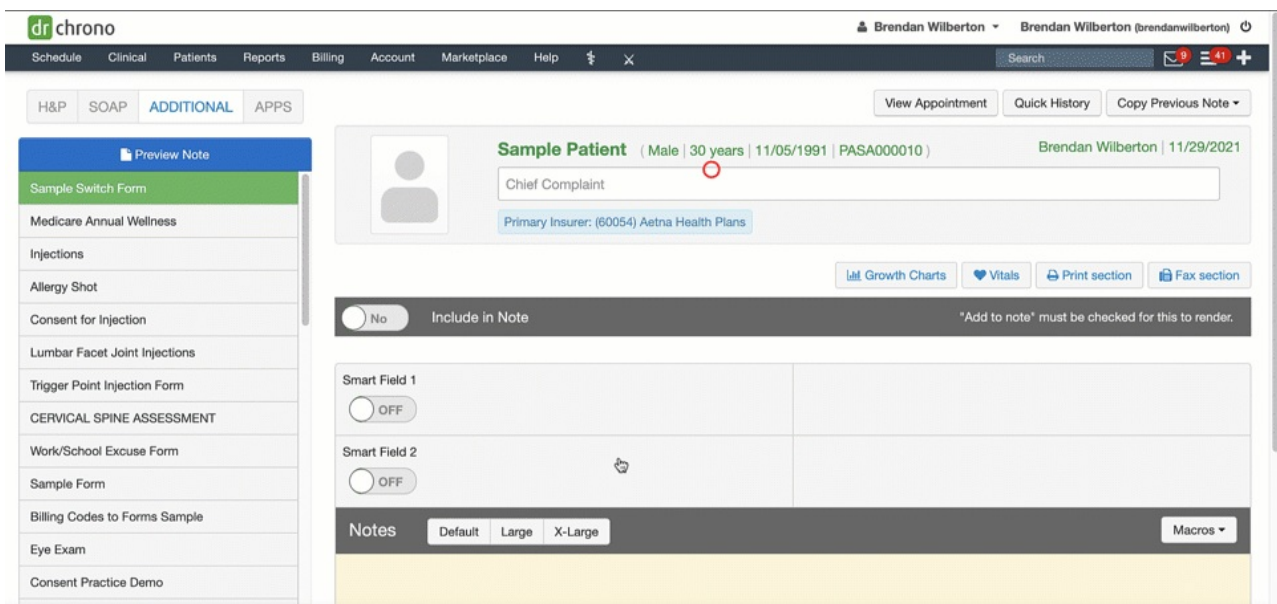
Options Undo Changes Save as Save

Library Email Facebook Twitter

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.