Getting Started with the Form Builder

Last modified on 10/16/2024 2:51 pm EDT

> 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.

An Introduction to the Form Builder

The form builder is one of DrChrono's most powerful tools, designed to save you time while charting and onboarding patients. Forms are medical templates for you to use to chart. The form builder **minimizes the amount of writing and typing you need to do while charting** by simplifying your charting workflow to a series of buttons, switches, checkboxes, and text fields. These components, known as fields, work together in a form to automatically generate text, creating your clinical note. While you're in an appointment, you spend less time charting and more time with your patient. When the appointment ends, a fully completed clinical note will be ready for your use. Additionally, these forms can be used to customize your patient's onboarding questions which they can fill out in advance of their appointment or through an on-site check-in kiosk (using the DrChrono kiosk mode on the check-in app). **Forms are optimized for both mobile and web experiences.**

Some customization is required to use the form builder. To effectively use forms, your form should match the clinical note or form-filling format you use in your day-to-day workflow. As a part of the DrChrono implementation process included with all paid accounts, we get you started by building out templates for you according to your practice needs. After implementation, you're free to build and customize forms yourself.

Familiarizing Yourself with the Form Builder

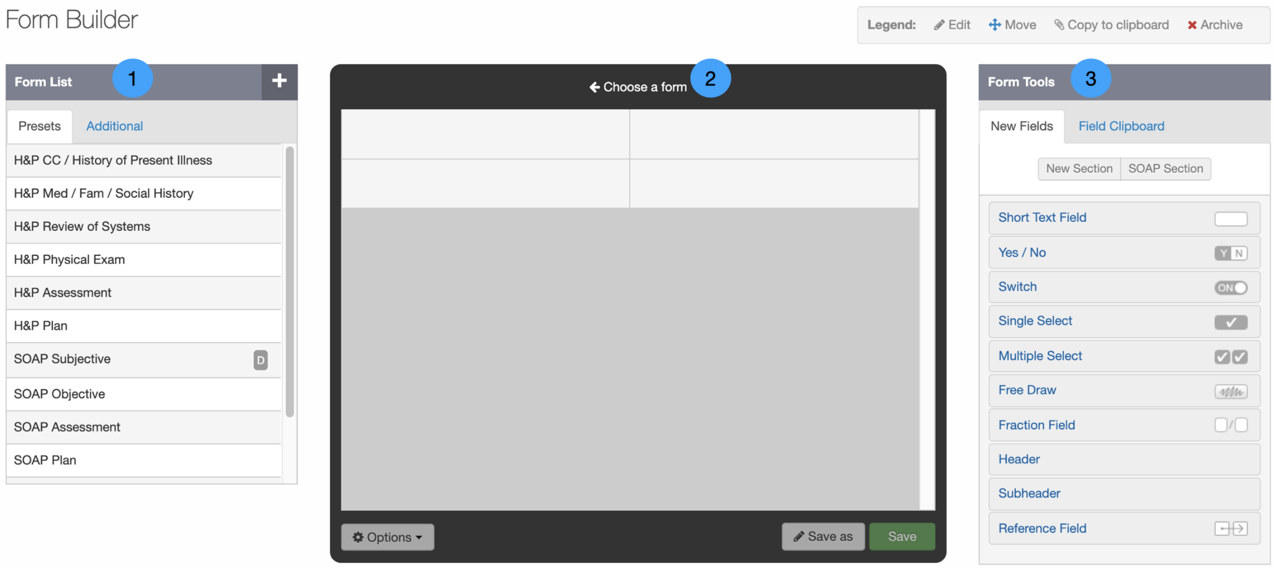
The **Form Builder** is located within the **Clinical** section of your navigation bar. To access the template builder, mouse over **Clinical** and select **Form Builder.**

The Form Builder is composed of three components.

1. Your Form List is on the left: select between the customizable preset templates that come with your account or additional templates, the custom templates you create or download from our community-sourced template library.

2. The form preview is located in the center, shaped like an iPad. Here you can click on field types in the Form Tools menu, then click on the area you wish to add the field. Then you may customize the text associated with each field.

3. To your right, you will find the Form Tools of available fields for you to use. Further in this guide, each type of field will be explained in-depth.



To use forms to their full potential, two things must be customized: your forms for your charting workflow and the clinical notes that are created from your appointment. Those guides are found here:

- How do I create form?: Guide Here
- How do I customize my clinical notes?: Guide Here