

How do I use reference fields in the Form Builder?

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In the Form Builder, reference fields allow you to cross-reference fields across different templates or within the same template. The purpose of reference fields is to easily pull values entered in a different field and have those values show up in a different section of your clinical note.

Possible uses include:

- An OnPatient template is filled out by the patient during the onboarding process. During the appointment, you can have a field that generates their response to your follow-up questions.
- If you have a template that generates text for the purpose of printing a prescription or lab order, you can generate text from your clinical templates and then select print.
- If you would like multiple instances of a value entered in your clinical notes, reference fields allow you to easily generate additional instances out of the section where the value was originally entered.

Note: Reference fields can only pull values from Short Text, Single, and Multiple Select 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.

Reference Field Setup

1. To begin with reference fields, navigate to your form builder (**Clinical > Form Builder**). Before you add reference fields to a template, make sure that you have a field or template set up that you would like to pull values from.

The screenshot displays the Form Builder interface. On the left is the 'Form List' pane with a search bar and a list of templates including 'Consent for Injection', 'Work/School Excuse Form', 'Eye Exam', 'Sample Form', 'Billing Codes to Forms Sample', 'Trigger Point Injection Form', 'Lumbar Facet Joint Injections', 'CERVICAL SPINE ASSESSMENT', 'Consent Practice Demo', 'Consent Free Draw 2', 'Physical Exam Multiple Select', and 'Share'. The 'Eye Exam' template is selected. The main area shows the 'Eye Exam' form template with fields for 'Eye Exam Performed Today?', 'Visual Acuity OD', 'Visual Acuity OS', 'Pinhole OD', 'Pinhole OS', 'Afferent Pupillary Defect OD', 'Afferent Pupillary Defect OS', 'Dilated OD', 'Dilated OS', 'IOP OD', 'IOP OS', 'CVF OD', and 'CVF OS'. A black arrow points to the 'Visual Acuity OS' field. On the right is the 'Form Tools' pane with tabs for 'New Fields' and 'Field Clipboard'. The 'Field Clipboard' tab is active, showing a list of field types: 'Short Text Field', 'Yes / No', 'Switch', 'Single Select', 'Multiple Select', 'Free Draw', 'Fraction Field', 'Header', 'Subheader', and 'Reference Field'. The 'Reference Field' option is highlighted.

2. When that field is set up, select a reference field from the right-hand **Form Tools** pane and click the desired location for the reference field on the form.

Form Tools

New Fields

Field Clipboard

New Section

SOAP Section

Short Text Field

Yes / No

Switch

Single Select

Multiple Select

Free Draw

Fraction Field

Header

Subheader

Reference Field

3. Click the field to set up your reference field. Under the reference section, select the template your desired field is located.

Edit Field

Label Name

Visual Acuity OS

Try to keep it short!

Wide field

Required field

Reference

[Choose Form]

Use current form

Spacing within note

New Line

New Paragraph

Generated text

Value

Patient

Date

Date & Time

Field Date

Field Date & Time

Header

Subheader

Bold

Italic

Underline

x₂

x²

Pt Demogr

Service

Date & Time

System Vitals

Custom Vitals

Custom Pt Demogr

{{value}}

Reference fields require a form to refer to.

Cancel

Update field

Edit Field

Label Name

Visual Acuity OS

Try to keep it short!

Wide field

Required field

Reference

Eye Exam

[Choose Field]

Spacing within note

New Line

New Paragraph

Generated text

Value

Patient

Date

Date & Time

Field Date

Field Date & Time

Header

Subheader

Bold

Italic

Underline

x₂

x²

Pt Demogr

Service

Date & Time

System Vitals

Custom Vitals

Custom Pt Demogr

{{value}}

Reference fields require a form and field to refer to.

Cancel

Update field

4. Then in the field below, select the field your value is pulled from. Now, when you enter in {{value}}, the text generated will be identical to the text generated with the {{value}} field from the original field. Click **Update Field**.

Edit Field

Label Name Visual Acuity OS Try to keep it short!

☐ Wide field ☐ Required field

Reference Eye Exam

Visual Acuity OS

Spacing within note ☐ New Line ☐ New Paragraph

Generated text

☒ Value
 ☒ Patient
 ☒ Date
 ☒ Date & Time
 ☒ Field Date
 ☒ Field Date & Time

Header	Subheader	Bold	Italic	Underline	x ₂	x²
Pt Demogr ▼	Service ▼	Date & Time ▼	System Vitals ▼	Custom Vitals ▼	Custom Pt Demogr ▼	


{(value)}

✖


Cancel
Update field

Eye Exam *

<p>Macula OS WNL?</p> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> YES <input type="checkbox"/> NO </div>	<p>Macula OS</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Multiple Select • • • ▴ ▾ </div>
<p>Vessels OD WNL?</p> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> YES <input type="checkbox"/> NO </div>	<p>Vessels OD</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Multiple Select • • • ▴ ▾ </div>
<p>Vessels OS WNL?</p> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> YES <input type="checkbox"/> NO </div>	<p>Vessels OS</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Multiple Select • • • ▴ ▾ </div>
<p>Periphery OD WNL?</p> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> YES <input type="checkbox"/> NO </div>	<p>Periphery OD</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Multiple Select • • • ▴ ▾ </div>
<p>Periphery OS WNL?</p> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> YES <input type="checkbox"/> NO </div>	<p>Periphery OS</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Multiple Select • • • ▴ ▾ </div>
<p>Visual Acuity OS</p> <div style="display: flex; align-items: center;"> <input style="width: 150px;" type="text"/> → <input style="width: 150px;" type="text"/> </div>	

 Options ▾

Undo Changes

 Save as

Save