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.

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.

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

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**.
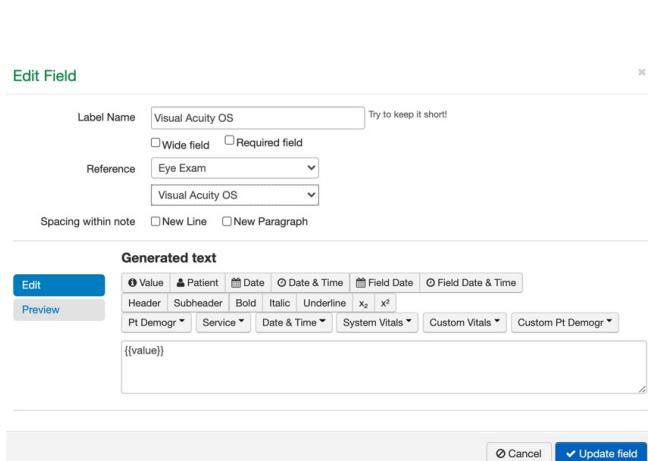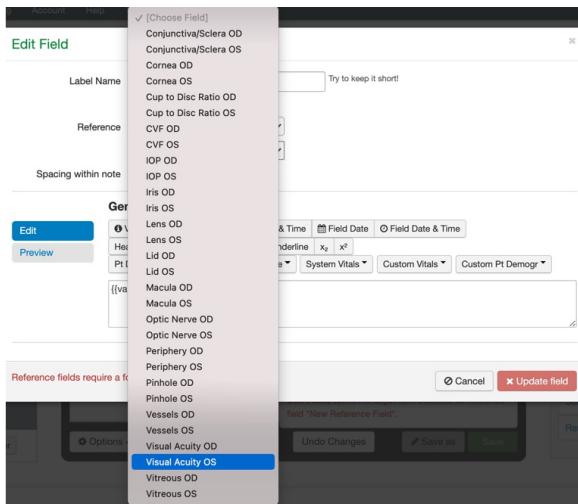
5. When the field editor closes, be sure to also select **Save** on your form.