

Form Builder - beta (New Version)

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Body paragraph. Use the paragraph style for introductory text.

DrChrono has given the form builder a new look! The new version comes with a new design and enhanced features to provide an easier workflow when creating custom templates. Not to worry, the existing form builder will still remain functional and run parallel to the new version.



Note: The new version of the Form Builder is currently only available on Google Chrome.

Where can I locate the new version?

- Clinical > Form Builder (beta) > Form Management screen

Which features have been removed?

- SOAP Section
- Preview Field

SOAP section - previously located within the Additional Tab under Form Tools > New Fields.

Preview Field - previously located within the individual tool when editing.

What's New?

- Form Type
- New Form Archive Tool

Let's take a look at how these new features apply to building a new custom form!

Searching existing Forms

In the new design, Preset and Additional Forms are listed alphabetically under the "Name" column. You can use the up/down arrows () to change the order list.

OR

Type the label name in the search box.

Last Modified - use the () to sort forms by the most recent modification

Action - edit (), archive (), options

Note: The option to "Set as Default Form" only allows one form to be selected.

Creating a Custom Form

Updates and changes will auto-save throughout the progression of the form.

- To begin building a new form, click "+ New Form". Like the old version, your blank form will appear in the middle canvas screen.
- Label the form - clicking the gear icon gives the option to Edit Form Info, Clear Form, Archive Form, and other functions.

Once a label has been created, you are ready to begin building your custom form.

- Using the field tools (Form Elements) - in this new version, you can drag and drop the field tools into the form. Simply grab the field tool, and drag it to the "Add Here" box that appears.
- Line Divider - a dividing line can be inserted by hovering between fields and clicking the "+" sign when it appears.

Icons located in the field box

*Pencil - edit field

*Paper - saves copied field under the clipboard tab

*Trash Can - delete field

- Editing the field tool- there are (3) tabs within this field (General, Customized Note, and Billing Code Attachment).

*General - label your field, add spacing and/or field width and field requirements.

*Customized Note - create a generated text using the variables (i.e. value).

*Billing Code Attachment - attach a single billing profile.

- Single/Multiple Select - the new version provides a Default Value dropdown option to choose from.

- **Form Type** - routes specific information to certain parts of the CCD file when sending patient data to registries or referring patients out.

New Form Archive Tool - a pop-up notification will appear if the form that is selected to be archived is associated with an unlocked clinical note.

To view archived forms with associated unlocked clinical notes, navigate to [Clinical > Archive \(beta\)](#).

You will be able to locate the form and either (1) search unlocked notes or (2) unarchive the form.

