Clinical Form Management - Getting Started & Managing Your Forms

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What is Clinical Form Management?

Clinical Form Management is your central hub for creating, organizing, and maintaining the custom clinical templates used in patient notes. Think of it as your form library — everything lives in one place and **changes save automatically** as you work.

> **Note:**
> Clinical Form Management requires Google Chrome. If you're using a different browser, switch to Chrome before proceeding.

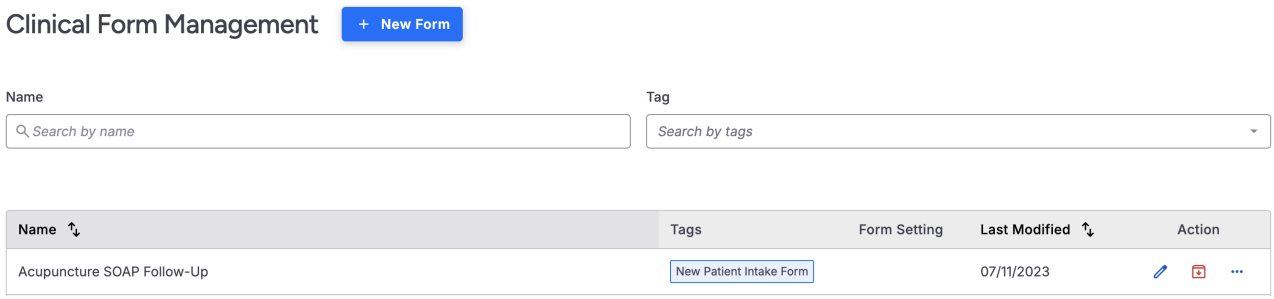
Finding Your Forms

To access your forms, navigate to:

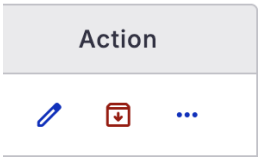
Clinical > Form Tools > Clinical Form Management

Your forms are listed alphabetically by default. You can:

- Search by name using the search box at the top
- Filter by tags using the tag search
- Sort by name (A–Z) or by the date last edited by clicking the column headers



Quick Actions



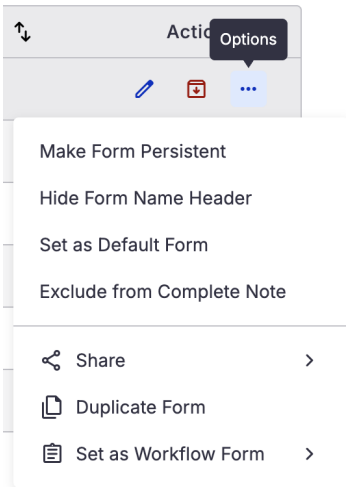
In the Action column next to each form, you'll find three options:

Edit (pencil icon): Open the form to make changes

Archive (box icon): Remove the form from active use

Options menu (three dots) : Access additional actions like sharing, duplicating, and more

Options Menu — What Each Action Does



Clicking the three-dot menu gives you these choices:

- **Make Form Persistent -** Keeps the form visible across all visits — best for long-term patient data like family history.
- **Hide Form Name Header -** Removes the form title from the top when the form is in use.
- **Set as Default Form** - This form loads automatically when creating a new entry. Only one form can be set as default at a time. Setting a new default will replace the previous one.
- **Exclude from Complete Note** - Keeps this form's data out of the compiled note.
- **Share** - Share the form with others via the Form Library or by email.
- **Duplicate Form** - Creates an exact copy — great for making variations without starting from scratch.
- **Set as Workflow Form** - Links this form to an automated workflow.