

# Clinical Form Management - Creating a New Form

Last modified on 06/11/2026 12:47 pm EDT

[Before You Start](#) | [Create a New Form](#) | [Edit & Remove Field](#) | [Field Settings](#) | [Format Form](#) | [Smart Fields](#)

## Before You Start

Your changes save automatically as you work – no Save button needed. You'll see a notification on screen while saving is in progress.



Wait for the save notification to disappear before switching tabs or opening another form. Moving too quickly can cause data loss.



Saving changes...

[Preview](#)



Changes saved

[Preview](#)

## Create a New Form

- Go to Clinical > Clinical Form Management
- Click New Form
  - A blank form appears in the center of your screen.
- Name your form
  - Click Options > Edit Form Info, type a name, then click Update.
- Add fields
  - Open the Form Elements tab on the side and drag the field type you want into the "Add Here" zones on your form.
- Add rows between fields
  - Hover between existing fields and click the + icon to insert a new row.
- Preview your form
  - Click the Preview button at any time to see how the form looks without leaving the builder.

Your browser does not support HTML5 video.

## Editing & Removing Fields

Hover over any field on your form to reveal three quick options:

- Edit – Opens the field settings panel
- Copy – Duplicates the field
- Delete – Permanently removes the field from the form

## Field Settings — The Three Tabs

When you edit a field, you'll see three tabs:

- General
  - Set the field label, width, spacing, and whether the field is required.
- Customized Note
  - Create auto-generated text using variables (like the patient's answer). This text flows into the clinical note and can be routed to the correct section of the note PDF.
- Billing Code Attachment
  - Attach a billing profile to this field, if needed.



When adding billing info to a field, choose either a billing profile OR individual clinical codes – not both. Using both on the same field can cause billing errors.

## Formatting Your Form Text

Use the text editor toolbar to make your forms easier to read:

- **Normal Text, Heading, Subheading** – for structure and hierarchy
- **Bold** – highlight important information
- **Italics** – emphasize medical terms
- **Underline** – draw attention to key details
- **Subscript / Superscript** – for formulas or clinical notations (e.g. H<sub>2</sub>O, cm<sup>2</sup>)

General Customized Note Code Attachment

Generated text

Normal Text - B I U X X'

+ Generated Text

Value  
Question Text  
Patient Info >  
Presets >  
Date & Time >  
System Vitals >  
Custom Vitals >

Update



You can combine formatting styles – for example, bold + underline – to make critical fields stand out.

## How to Set Up Smart Fields

Smart fields show or hide based on a patient's answer to another field – keeping forms clean and only showing what's relevant.

- Turn on the Smart Field toggle for the parent (main) field.
- For each child field, select the parent field from the Parent Field dropdown.
- Child fields will only appear when the parent field is filled in.

Your browser does not support HTML5 video.

---