

Clinical Form Management - Editing, Archiving & Best Practices

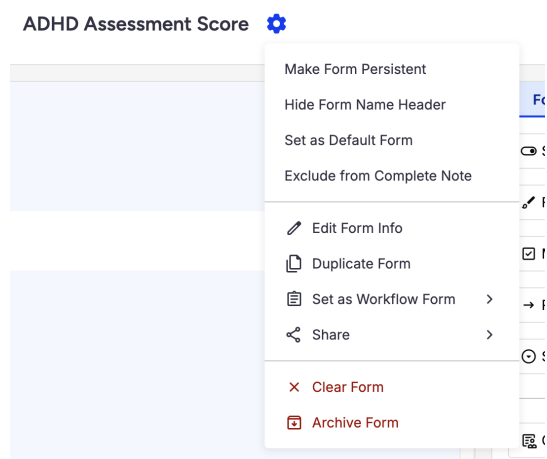
Last modified on 06/11/2026 1:57 pm EDT

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Editing an Existing Form

To edit a form, find it in your form list and click the pencil icon in the Action column. While editing, the Options menu (gear icon) at the top gives you access to the following and more:

- Edit Form Info – Change the form name, description, or configuration
- Clear Form – Erases all entered data and resets to blank (shown in red – this cannot be undone)
- Archive Form – Removes the form from active use (shown in red – see Archiving section below)
- Duplicate Form – Creates a copy to use as a template or starting point



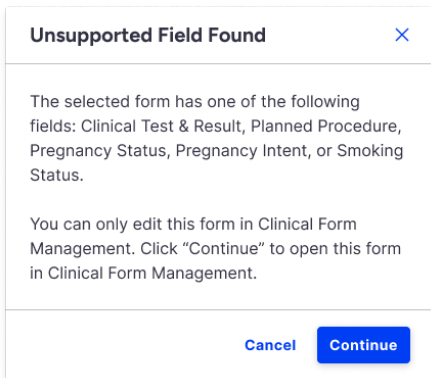
Forms with USCDI v3 Fields

Some forms contain special USCDI v3 fields, including:

- Clinical Test & Result
- Planned Procedure
- Pregnancy Status
- Pregnancy Intent
- Smoking Status

When opening forms these forms in the Legacy Form Builder, a pop-up will appear with two options:

- Continue – Takes you to Clinical Form Management, where the form opens automatically for editing.
- Cancel – Closes the pop-up and keeps you in the Legacy Form Builder. The form will not open, but you can select another form to edit.



Archiving a Form

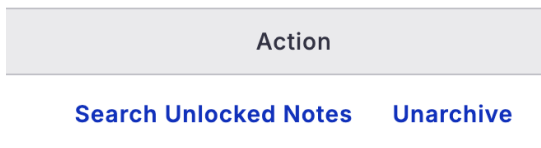
Archiving removes a form from active use while keeping all its data intact for historical reference.

To Archive a Form

- Go to Clinical > Clinical Form Management
- Click the archive icon next to the form you want to archive.
- If the form is being used in any unlocked notes, you'll see a notification.
 - You must lock those notes before the form can be fully archived.

To View or Restore Archived Forms

- Go to Clinical > Archive (beta)
- Search for the archived form you're looking for.
- Use the available options to unarchive the form or search for any unlocked notes still tied to it.

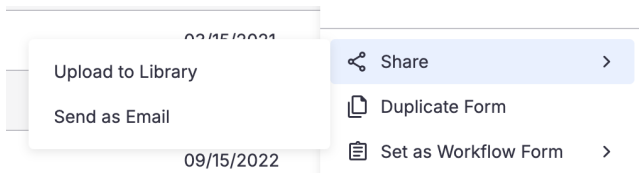


Sharing a Form

- Go to Clinical > Clinical Form Management
- Click the three-dot menu (...) next to the form.
- Click Share.

Then choose how to share:

- Upload to Library – Makes the form available to others through the shared Form Library
- Send as Email – Sends the form as an email attachment



Best Practices

Keep Forms a Manageable Size

- Aim for 55 fields or fewer per form for the best performance

- Forms with more fields can load slowly or become less responsive
- If a form is getting large, consider splitting it into two smaller forms
- Remove unused or duplicate fields regularly



Existing forms that exceed the recommended limit will show a warning that they may not load as expected.

Use Persistent Forms Only for Long-Term Data

Persistent forms carry data forward across every visit. Use them for information that doesn't change between appointments, such as:

- Family history (e.g., Father has Type 2 Diabetes)
- Social history

For visit-specific information, use Copy Previous Note instead. This lets you select exactly which forms and dates you want to pull data from.



Using persistent forms for visit-specific data will pull the same information into every future appointment automatically.

Wait for Auto-Save

A save notification appears at the top of the screen while your changes are being saved. Always wait for it to disappear before:

- Switching to another tab in DrChrono (Calendar, Form Builder, etc.)
- Opening a different form in the same appointment

Use Smart Fields to Keep Forms Clean

Smart fields reduce clutter by only showing relevant fields based on what the patient or provider has entered. A well-structured smart field setup can reduce form length significantly while keeping all necessary options available.
