Form Builder - beta (New Version)

07/24/2024 2:45 pm EDT

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.

Form Tools		
New Fields	Field Clipboard	
Nev	v Section SOAP Section	-
Short Text F	field	
Yes / No		YN

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

Edit Field										
Lat	oel Name	Patie	Patient Other Services					Try to keep it short!		
Spacing wi	ithin note	Wide field Required field New Line New Paragraph								
Defa	ault value									
	Ger	nerate	d text							
Edit	0	/alue	Patient	🛗 Date	0 D	ate & Time	🛗 Fie	eld Date	@ Field Date & Time	
Preview	Hea	ader S	ubheader	Bold	Italic	Underline	X2	X ²		
TIONOW	Pt I	Demogr	Serv	ice 🔻	Date &	Time 🔻 🛛 S	System	Vitals 🔻	Custom Vitals -	

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, both Preset and Additional Forms are listed in alphabetical order under the "Name" column. You can use the up/down arrows (

 \uparrow_{\downarrow}

) to change the order list.

OR

Type the label name in the search box.

Name

ዲ Search by name

Last Modified - use the (

†↓ |

) to sort forms by the most recent modification

Action - edit (
), archive (
€
), options
Make Form Persistent
Hide Form Name Header
Set as Default Form
Exclude from Complete Note
Duplicate Form
🖹 Set as Workflow Form ゝ
/ 🗊 🛄

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 the button "+ 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.

New Clinical Form	\$
	Make Form Persistent
	Hide Form Name Header
	Set as Default Form
	Exclude from Complete Note
	Edit Form Info
	Duplicate Form
	🗐 Set as Workflow Form 🔉
	× Clear Form
	Archive Form

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 appears.

÷		New F	Patient Intake Form (under 10) 🛛 🌣		
	+ Add Here		+ Add Here	 Form Element	Clipboard
L				 Switch	% Fraction Field
				🖌 Free Draw	H Header
				🗹 Multi Select	• Yes / No
				→ Reference	Tr Text Field
				⊙ Single Select	h Subheader

• Line Divider - a dividing line can be inserted by hovering between fields and clicking the "+" sign when it appears.

+ Add Here	+ Add Here
New Text Field	Prev Yes / No
Text Field	

Icons located in the field box

New Text Field			
Text Field		U	U

*Pencil - edit field

*Paper - saves copied field under the clipboard tab

*Trash Can - delete field

• Editing the field tool- there a (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.

Que	stion Text	
Ne	w Multiple Select	
Field	d Value	
H	1	Ō
H	2	Ō
H	3	Ō
	+ Add Value	
Defa	ault Value (Optional)	
Sea	arch	-
1		
2		
3		

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

New Clinical Form	0
	Edit Form Info
Edit Form Info	×
Form Name	
New Clinical Form	
Form Type	
None	~

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.

H&P	SOAP	ADDITIONAL	APPS					
	P	review Note			Chrissy Brigh			
onpatient	/ Check-l	n			W/C claim			
CC / Histo	ory of Pres	sent Illness						
Med / Far	n / Social	History						
Medicatio	ins & Aller	gies						
Review of	Systems			No Include in Note				
Physical E	Exam							
Assessme	ent							
Plan				Location				
Billing				Please select at least one option				
				Quality				
🔺 An	chived F	orms		Please select at least one option				
	ere are for ve been a	rms used in this no rchived.	ote that					
	D	ismiss Learr	More	Severity				
				Please select one option	*			

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.

Schedule Clinical	Patients Reports	Billing	Account	Marketplace	Help	ŧ	x	Search	28 ± 119 +
Form Archiv	e								
Form Name								Action	
Test 1							Se	earch Unlocked Notes	Unarchive
Test to change title/	changing/rename						Se	earch Unlocked Notes	Unarchive
Touring Health							Se	earch Unlocked Notes	Unarchive
Training							Se	earch Unlocked Notes	Unarchive
Urgent Care							Se	earch Unlocked Notes	Unarchive
Vitality Medical							Se	earch Unlocked Notes	Unarchive
Vitals (Klarisana)							Se	earch Unlocked Notes	Unarchive
W/C							Se	earch Unlocked Notes	Unarchive
Walk In							Se	earch Unlocked Notes	Unarchive
Acupuncture: Patier	nt Registration & MH						Se	earch Unlocked Notes	Unarchive
								1 22	23 24 🕨

How to Archive a Form a form.