

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.

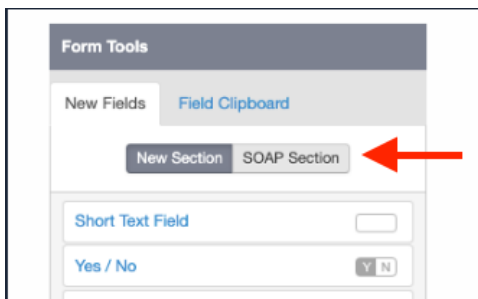
Where can I locate the new version?

- 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.



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

Edit Field

Label Name Try to keep it short!

Wide field Required field

Spacing within note New Line New Paragraph

Default value

Generated text

Header Subheader Bold Italic Underline x_2 x^2

Pt Demogr

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 (



) to change the order list.

OR

Type the label name in the search box.

Name

Last Modified - use the (



) to sort forms by the most recent modification

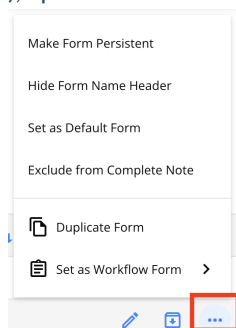
Action - edit (



), archive (



), options




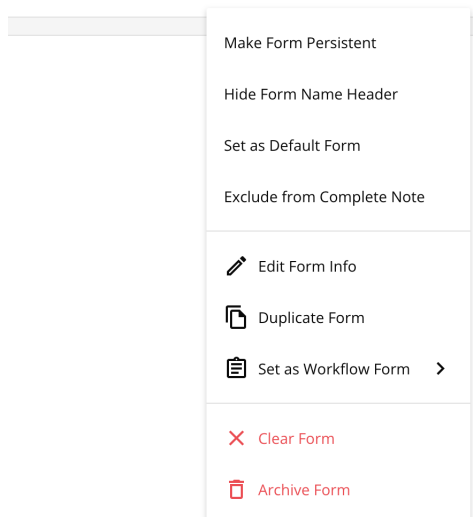
Note: The option to "Set as Default Form" only allows one form to be selected.

Creating a Custom Form

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

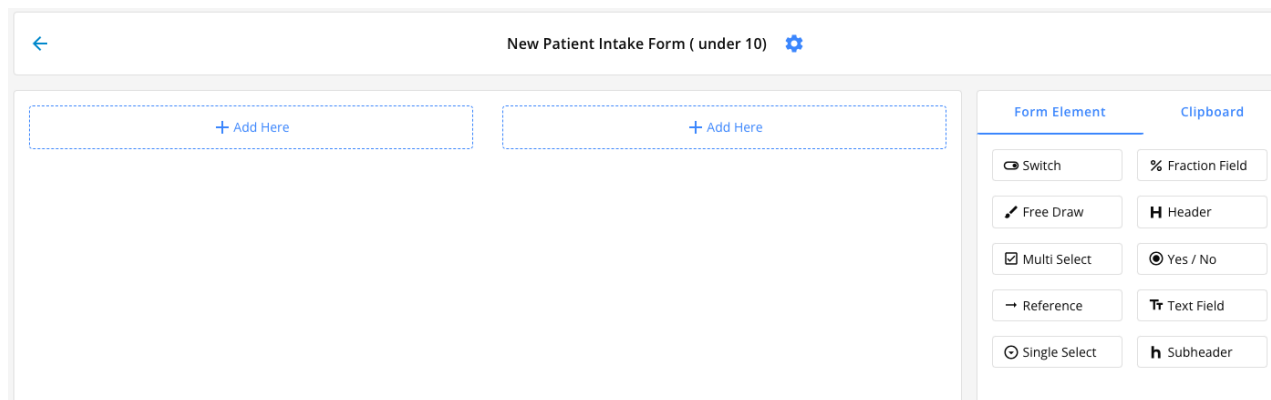
- To begin building a new form click the button "+ New Form". Like the old version, your blank form will appear in the middle canvas screen.
- Label the form - clicking the gear icon gives the option to Edit Form Info, Clear Form, Archive Form, and other functions.

New Clinical Form 

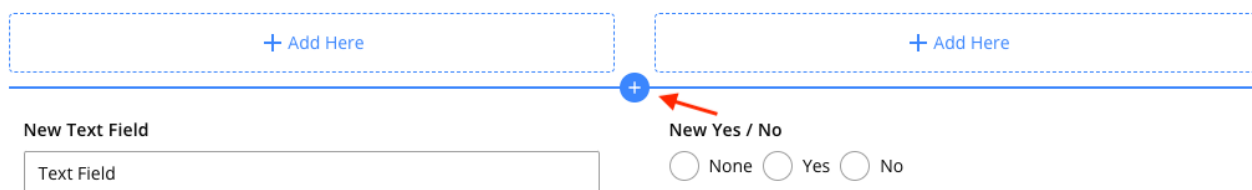


Once a label has been created, you are ready to begin building your custom form.

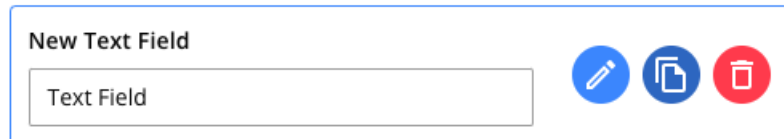
- Using the field tools (Form Elements) - in this new version, you can drag and drop the field tools into the form. Simply grab the field tool, and drag it to the "Add Here" box appears.



- 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 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.

Question Text

Field Value

⋮

🗑

⋮

🗑

⋮

🗑

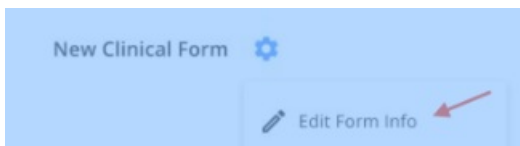
+ Add Value

Default Value (Optional)

Search...

1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input type="checkbox"/>

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



Edit Form Info ✕

Form Name

Form Type

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

Preview Note

onpatient / Check-In

CC / History of Present Illness

Med / Fam / Social History

Medications & Allergies

Review of Systems

Physical Exam

Assessment

Plan

Billing

Chrissy Brigh

W/C claim

No
 Include in Note

Location

Quality

Severity

⚠ Archived Forms

There are forms used in this note that have been archived.

[Dismiss](#)
[Learn More](#)

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.

Form Archive

Form Name	Action
Test 1	Search Unlocked Notes Unarchive
Test to change title/changing/rename	Search Unlocked Notes Unarchive
Touring Health	Search Unlocked Notes Unarchive
Training	Search Unlocked Notes Unarchive
Urgent Care	Search Unlocked Notes Unarchive
Vitality Medical	Search Unlocked Notes Unarchive
Vitals (Klarisana)	Search Unlocked Notes Unarchive
W/C	Search Unlocked Notes Unarchive
Walk In	Search Unlocked Notes Unarchive
Acupuncture: Patient Registration & MH	Search Unlocked Notes Unarchive

How to [Archive a Form](#) a form.