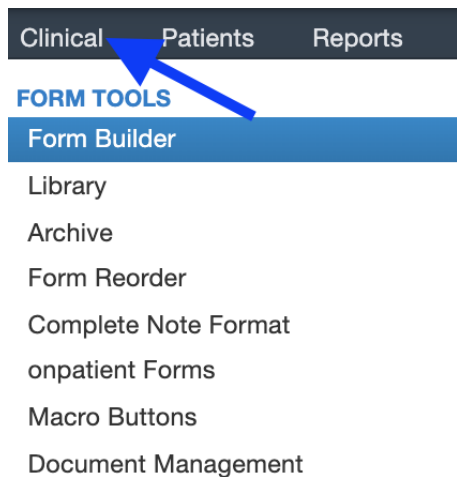


Form Builder Overview

07/24/2024 2:50 pm EDT

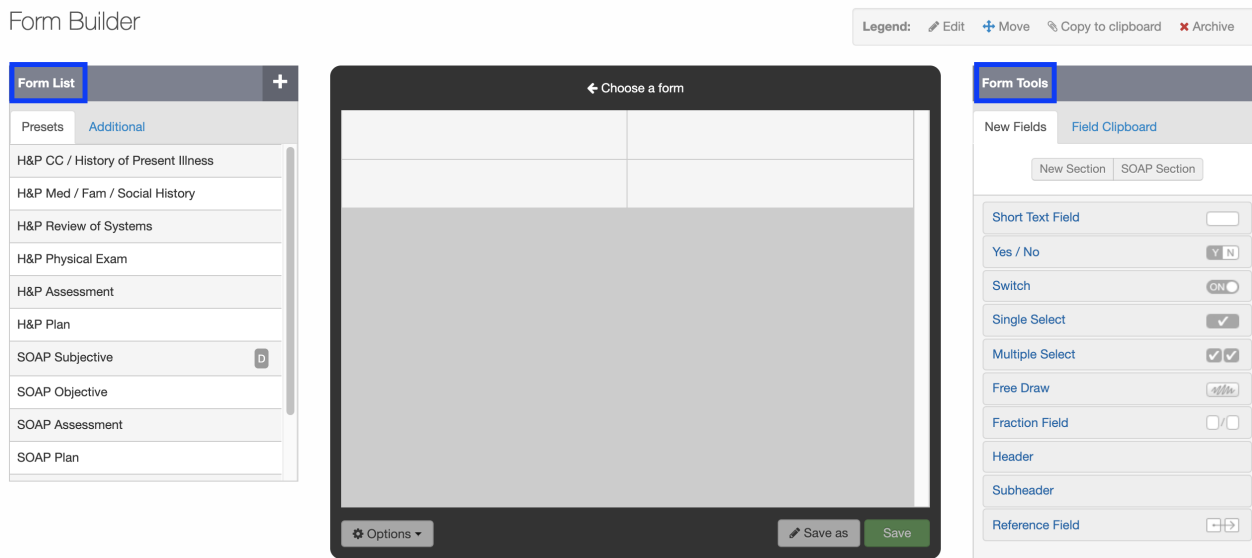
DrChrono's Form Builder allows you to create and customize your clinical templates, allowing you to focus on patient care with forms that are specific to your practice.


1. To get to the Form Builder, go to **Clinical > Form Builder**.



2. The Form Builder consists of 3 main parts: Form List on the right, Form Tools on the left, and the building screen in the middle.

Form Builder



3. The Form List consists of **Preset** forms which are H&P, SOAP, and OnPatient forms that you can use and/or customize; the **Additional** tab is where any forms you have created or selected from the Form Library; the () is used to start a form.

Form List +

Presets **Additional**

- H&P CC / History of Present Illness
- H&P Med / Fam / Social History
- H&P Review of Systems
- H&P Physical Exam
- H&P Assessment
- H&P Plan
- SOAP Subjective D
- SOAP Objective
- SOAP Assessment
- SOAP Plan
- onpatient Additional Info
- onpatient Reasons For Visit

4. The middle section of the Form Builder is where all of the building, editing, and customizing of templates takes place. To edit a form, simply select it from the **Presets** or **Additional** tabs. The **Options** menu allows you to apply certain settings to the selected form. For more on the **Options** menu, click [here](#).

Form Builder

Legend: ✎ Edit ➕ Move 📄 Copy to clipboard ✖ Archive

Form List +

Presets **Additional**

- H&P CC / History of Present Illness**
- H&P Med / Fam / Social History
- H&P Review of Systems
- H&P Physical Exam
- H&P Assessment
- H&P Plan
- SOAP Subjective D
- SOAP Objective
- SOAP Assessment
- SOAP Plan

Share

Library Email Facebook Twitter

H&P CC / History of Present Illness

| | |
|--------------------------------------|----------------------------|
| Location Multiple Select | Location Comments |
| Quality Multiple Select | Quality Comments |
| Severity Single Select | Severity Comments |
| Duration Multiple Select | Duration Comments |
| Onset / Timing Multiple Select | Onset Comments |
| Context Multiple Select | Context Comments |
| Modifying Factors Multiple Select | Modifying Factors Comments |

⚙️ Options ✎ Save as Save

Form Tools

New Fields **Field Clipboard**

- Short Text Field
- Yes / No Y N
- Switch ON
- Single Select
- Multiple Select
- Free Draw
- Fraction Field
- Header
- Subheader
- Reference Field

5. The **Form Tools** consists of two parts: **New Fields** and **Field Clipboard**. **New Fields** are the types of fields that can be added to a form for clinical charting or patient onboarding.

Form Tools

New Fields **Field Clipboard**


Short Text Field

Yes / No Y N

Switch ON

Single Select

Multiple Select


Free Draw 


Fraction Field /




Header

Subheader

Reference Field ↔

You can copy fields to use again in the same or other templates by using the () in the lower left-hand corner of any field. This will copy the field to the **Field Clipboard** for later use.

Location Comments 

For an explanation of the **New Fields** click [here](#).

Click [here](#) for our YouTube playlist on Form Building.

Click [here](#) for our article on the types of fields you can use to create a medical note.
