Form Builder Overview

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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**.

Clinical	Patients	Reports
FORM TOO	S	
Form Build	ler	
Library		
Archive		
Form Reor	der	
Complete	Note Format	
onpatient l	Forms	
Macro But	tons	
Document	Management	t

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					Legend:	# Edit	🕂 Move	ℜ Copy to clipboard	× Archive
Form List	+		← Choo	ose a form			Form Tool	ls	
Presets Additional						1	New Field	s Field Clipboard	
H&P CC / History of Present Illness						L		New Section SOAP S	ection
H&P Med / Fam / Social History	- 11						Short Te	vt Field	
H&P Review of Systems									
H&P Physical Exam	-11						Yes / No		YN
H&P Assessment							Switch		ONO
H&P Plan							Single S	elect	
SOAP Subjective							Multiple	Select	
SOAP Objective							Free Dra	w	4/110
SOAP Assessment							Fraction	Field	0/0
SOAP Plan							Header		
							Subhead	der	
		Options		Save as	Save		Referenc	ce Field	

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						
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	X Archive
Form List	H&P CC / History of Present Illness				Form Tools		
Presets Additional	Location	Location Comments			New Fields	Field Clipboard	
H&P CC / History of Present Illness	Multiple Select		J		Short Text	Field	
H&P Med / Fam / Social History	Quality Multiple Select	Quality Comments			Yes / No		YN
H&P Review of Systems	Severity	Severity Comments			Switch		ONO
H&P Physical Exam	Single Select • ¢)		Single Sel	ect	
H&P Assessment	Duration	Duration Comments			Multiple S	elect	
H&P Plan	Multiple Select				Free Draw		Mm
SOAP Subjective	Onset / Timing Multiple Select	Onset Comments			Fraction F	ield	
SOAP Objective					Header		
SOAP Plan	Context Multiple Select	Context Comments			Subheade	r	
	Modifying Factors	Modifying Factors Comments			Reference	Field	$\rightarrow \rightarrow$
Share	Multiple Select						
Library Email f Facebook Y Twitter	✿ Options ▲	A Save as	Save				

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 Fi	eld	
Yes / No		YN
Switch	ON	
Single Select		
Multiple Sele		
Free Draw		MM
Fraction Field	d	0/0
Header		
Subheader		
Reference Fi	eld	+>

You can copy fields to use again in the same or other templates by using the(

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) 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.