## Excluding Forms from the Clinical Note

07/24/2024 2:30 pm EDT

Through DrChrono's Form Builder settings, you can exclude a form or multiple forms from your complete note. Excluding templates from the complete note allows you to still complete forms during a clinical visit, but the information you document will not appear on the rendered clinical note for the visit.

1. To exclude a clinical template from the note, go to **Clinical > Form Builder**.

Clinical	Patients	Reports	
FORM TOOL	S		
Form Build	ler		
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2. Select the form from the **Form List** that you would like to exclude, click on the **Options** menu, and click **Exclude from Complete Note**.

Form List +	H&P Me	d / Fam / Social History
Presets Additional H&P CC / History of Present Illness	Medical History	
H&P Med / Fam / Social History	Past Medical History Multiple Select	Past Medical History Freewrite
H&P Physical Exam	Past Surgical History	Comments
H&P Assessment	Hide Form Name Header Set as Default Form	Comments
SOAP Subjective	Exclude from Complete Note	Comments
SOAP Objective	Reset to Default Duplicate Form	
SOAP Assessment	Clear Form	

3. Next to the form you have excluded from the complete note will be an (

E ) icon.

Form Builder		Legend: 🖋 Edit
Form List +	H&P Med / Fa	m / Social History
Presets Additional H&P CC / History of Present Illness	Medical History	
H&P Med / Fam / Social History	Past Medical History Multiple Select	Past Medical History Freewrite
H&P Physical Exam	Past Surgical History Multiple Select	Comments
H&P Assessment H&P Plan	Childhood illnesses Multiple Select	Comments
SOAP Subjective	Childhood Immunizations Multiple Select	Comments
SOAP Assessment	Date of last PE	
Share Library Email <b>f</b> Facebook <b>Y</b> Twitter	Options •	Save as Save

4. The excluded form, will not appear on the complete note, but can still be filled out.

Schedule Clinical Patients Reports Bil	Iling Account Help \$ X Peter Django Male   26 years   12/21/1993	ng Account Help	* ×				Search		<b>⊵</b> <sup>30</sup> <b>±</b> <sup>27</sup> <b>+</b>
H&P SOAP ADDITIONAL APPS	Yes Include in Note	Status: Not Loc	ked	+ Amendments	Revisions	View Fax	Sign & lock	Edit Sections	Print sections
Preview Note									
onpatient / Check-In	Medical History	To change note form	nat, click on Clinical > Complete Note Format.						
CC / History of Present Illness	ON		Provider' James Smith	VISIT: 10/19/202	11 9-111AM	unarr: un	PEDODOOT		
Med / Fam / Social History	Past Medical History		Primary Payer ID:	Secondary P	ayer ID:	onara bo	2000001		
Medications & Allergies	CHF x							_	
Review of Systems			Chief Complaint: Pain						
Physical Exam	et Surgical History	History of Present Illness: Peter Django describes the location to be lateral							
Assessment	AP x any entry x appendectomy x								
Plan	The quality of pain is described as aching, burning and a severity / intensity level of 9 out of 10 The quality of pain is described as aching, burning and a severity / intensity level of 9 out of 10 This during of the machine detail of an external resource of the machine details of an external resource of the mac								
Billing	whooping cough × tetanus ×	Patient explains the timing/inset of signs/signs/inset of signs/si							
	scarlet fever ×								
	Childbood Immunizations								
	DTP - DTaP × Polio × Tetanus ×		_						
			Medications & Allergies:						
			Current Medication & Dosage	Dispense	SIG	PRN?	Indication		
			Vyvanse 40 mg oral capsule	0	0	No		-	
			ALPRAZelam 1 mg oral tablet	0	-	No			
			PLT IVECOMENT FING ONE WEIGH	1.0	1 °	1.00		_	
			Allergy	Reaction					

5. If you would like to return the excluded template in the note, follow the same steps and select **Include in Complete Note**.

## Form Builder

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Form List +	H&P Med / Fam / Social History				
Presets Additional	Medical History				
H&P CC / History of Present Illness	ON				
H&P Med / Fam / Social History	Past Medical History     Past Medical History Freewrite       Multiple Select     • • • • • • • • • • • • • • • • • • •				
H&P Review of Systems					
H&P Physical Exam	Past Surgical History Comments				
H&P Assessment	Hide Form Name Header				
H&P Plan	Set as Default Form				
SOAP Subjective	Comments				
SOAP Objective	Reset to Default Duplicate Form				
SOAP Assessment	Clear Form				
Share	♦ Options ▲ Save as Save				
Library Email <b>f</b> Facebook <b>9</b> Twitter					