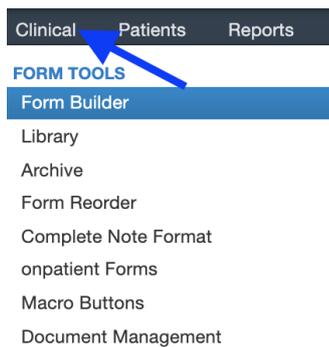


# Excluding Forms from the Clinical Note

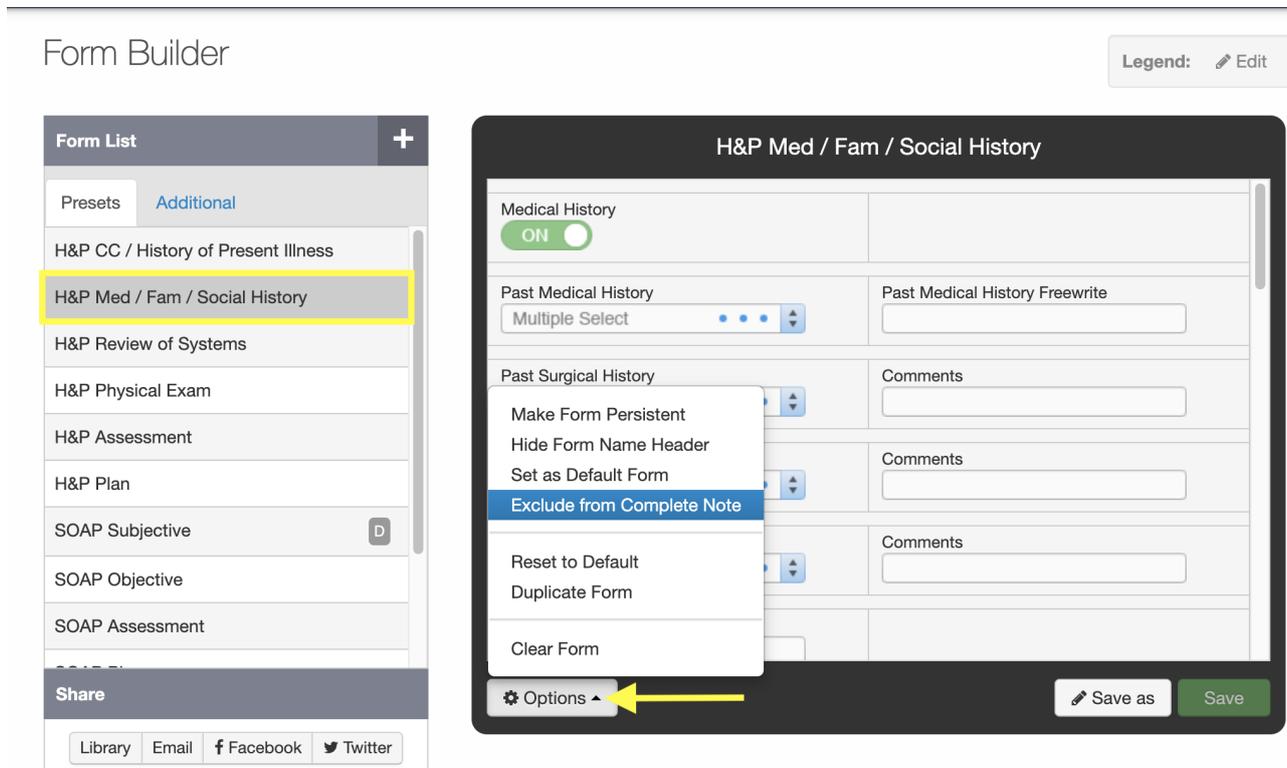
07/24/2024 2:30 pm EDT

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**.



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**.



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

E

) icon.

# Form Builder

Legend: Edit

**Form List** +

Presets Additional

H&P CC / History of Present Illness

H&P Med / Fam / Social History E

H&P Review of Systems

H&P Physical Exam

H&P Assessment

H&P Plan

SOAP Subjective D

SOAP Objective

SOAP Assessment

---

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**H&P Med / Fam / Social History**

Medical History  ON

---

Past Medical History Past Medical History Freewrite

Multiple Select

---

Past Surgical History Comments

Multiple Select

---

Childhood illnesses Comments

Multiple Select

---

Childhood Immunizations Comments

Multiple Select

---

Date of last PE

---

Options
 Save as
Save

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

The screenshot shows a clinical note for Peter Django, Male, 25 years, dated 12/21/1993. The note is titled "Status: Not Locked". On the left, a "Form Builder" sidebar shows various forms, with "Med / Fam / Social History" highlighted in green. On the right, the "Note Preview" shows the content of the note. The "Med / Fam / Social History" section is visible in the note, containing fields for "Past Medical History" (with "CHF" selected), "Past Surgical History" (with "Appendectomy" selected), "Childhood illnesses" (with "whooping cough", "tetanus", and "scarlet fever" selected), and "Childhood Immunizations" (with "DTP - DTap", "Polio", and "Tetanus" selected). The note also includes sections for "Chief Complaint: Pain", "History of Present Illness", and "Medications & Allergies".

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

**Form List** +

Presets **Additional**

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

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**H&P Med / Fam / Social History**

Medical History  ON

Past Medical History Multiple Select ••• ▾ Past Medical History Freewrite

Past Surgical History ••• ▾ Comments

**Include in Complete Note**

Reset to Default ••• ▾ Comments

Duplicate Form ••• ▾ Comments

Clear Form

Options ▾ Save as Save