How do I create clinical forms?

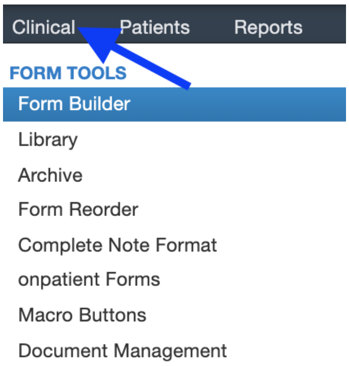
07/24/2024 3:55 pm EDT

When you begin building forms, review what your typical charting workflow looks like. In chronological order, think of what elements should be toward the top (beginning) of the appointment and which elements should be toward the bottom (end) of the appointment.

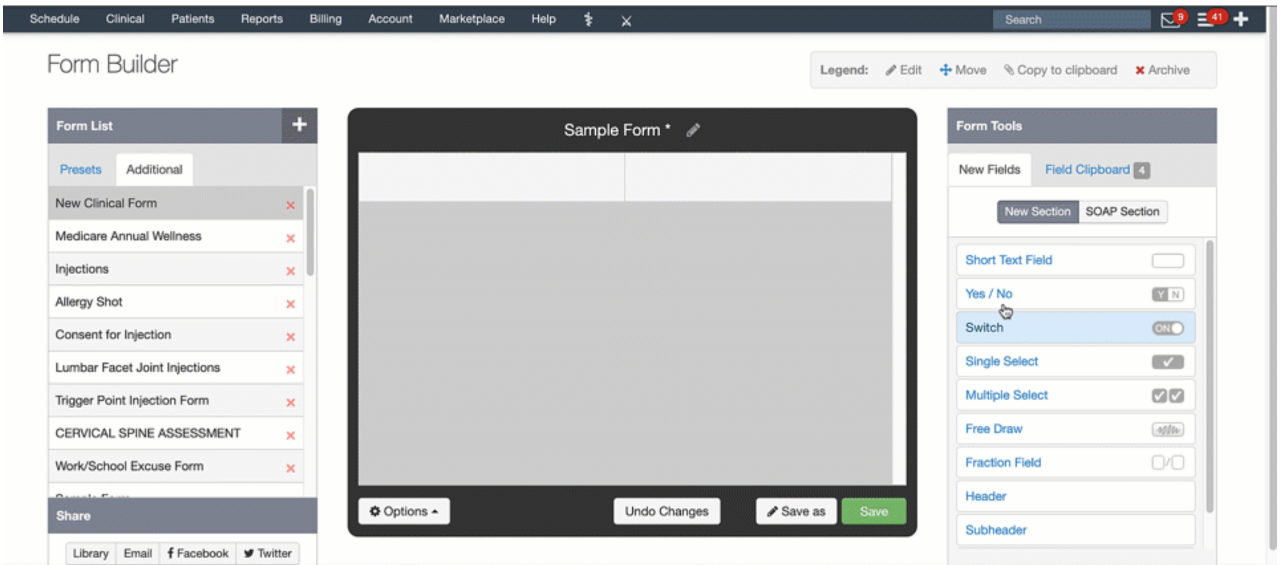
Keeping your form well-organized is key to a seamless experience. To group types of questions together you can hide or reveal clusters of questions using a switch. When you have a rough idea of what your form should look like, you can dive into creating your form.

Building a form from scratch may be daunting so starting from a pre-built form could be used to your advantage. You have two ways of doing this: your account comes with pre-built forms that you can customize or you can find specialty-specific templates sourced from our community in our form library (**Clinical** > **Library**).

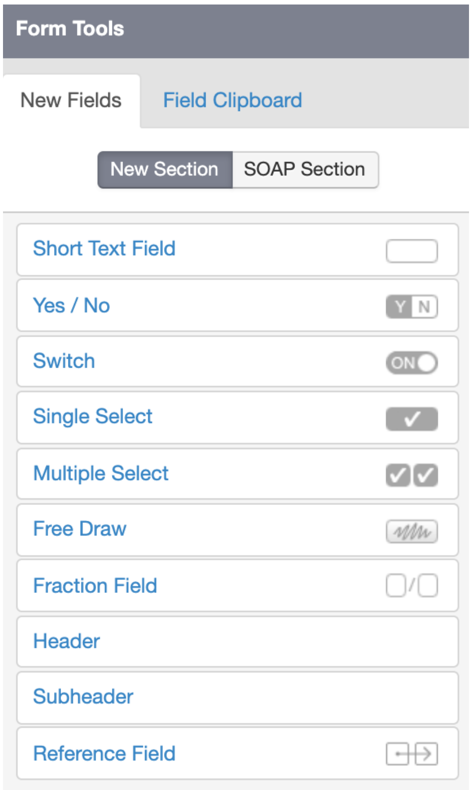
To create forms go to **Clinical** > **Form Builder**.



Click on a field from the **Form Tools** menu on the right then click on the form builder in the middle where you would like the field to go.



You have several types of fields that you can use, all of which can be used to populate text into your clinical notes.



- Short-text fields: freely enter text into this field.
- Yes/No fields: select between yes and no as options.
- Switches: Turn on or off generated text in your clinical note. This could be specific instructions for different conditions, notes, etc. that you wish to reflect in your clinical note.
  - Switches can also be associated with smart fields, which will appear only if the switch is toggled "ON". (Guide on smart fields)
- Single Select fields: Select an option from a list of options (dropdown menu). Here, only one selection can be made.
- Multiple Select fields: Select as many options as applies from a list of options.
- Diagrams: This enables the ability to take pictures, pull documents from the patient's document library, or draw diagrams with a touchscreen device or computer mouse. (Guide on using diagram/freedraw fields)
- Fraction Fields: This field has two boxes to enter a numerator and denominator, separated by a fraction '/' delimiter.
- Header: A header for sections of your template, appears bolded.
- Subheader: A header for a subsection of your template, appears not bolded.
- Blank Fields: Used to space apart sections of your template for organizational purposes.
- Reference Fields: Pulls entered values from fields in other templates or duplicates values in the same template. (Guide on using reference fields)

You may switch between 'New Section' and 'SOAP Section'. The SOAP section fields function like 'New Section' fields except generated clinical note text includes subjective, objective, assessment, and plan.

Think about what kinds of questions you may ask your patient and what fields would be suitable for those answers. As you go question by question, add fields to the form builder menu. Customize the fields by clicking on them.

Edit Field

Label Name: Site — Try to keep it short!

☐ Wide field ☐ Required field

Allowed Values:

Value			
Right Deltoid	Move	Default	Remove
Left Deltoid	Move	Default	Remove
Right Gluteus	Move	Default	Remove
Left Gluteus	Move	Default	Remove

+ Add option

Spacing within note: ☑ New Line ☐ New Paragraph

Generated text

Edit

Preview

Value | Patient | Date | Date & Time | Field Date | Field Date & Time

Header | Subheader | Bold | Italic | Underline | x_2 | x^2

Pt Demogr | Service | Date & Time | System Vitals | Custom Vitals | Custom Pt Demogr

INJECTION SITE: {{value}}

Cancel | No changes