## How do I use Switches as Smart Fields?

07/24/2024 4:30 pm EDT

Smart Fields are fields that are revealed when a switch is toggled to the ON position. The purpose of a Smart Field is to minimize clutter in your templates and easily trigger a natural procession of follow-up questions. Only Switches can be made into Smart Fields.

Navigate to Clinical and select Form Builder.

Clinical	Patients	Reports				
FORM TOOL	S					
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Under the Form Tools, click the **Switch** field and then click where you want it to go on the form.



Click on the newly added switch field to bring up the field editor.

- Select the Smart Field checkbox to make this switch field a Smart Field.
- When you are done, select the Update Field button.
- At the bottom of the form builder, select Save to start associating other fields to the Smart Field.
- Add fields that you would like to be revealed when the switch is triggered by selecting the switch name from the **Parent Field** dropdown.

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New Clinical Form	×	-						New Section S	OAP Section
Medicare Annual Wellness	×								
Injections	×							Short Text Field	
Allergy Shot	×							Yes / No	YN
Consent for Injection	×							Switch	GND
Lumbar Facet Joint Injections	×							Single Select	
Trigger Point Injection Form	×							Multiple Select	
CERVICAL SPINE ASSESSMENT	×							Free Draw	404+
Work/School Excuse Form	×							Fraction Field	0/0
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Repeat as necessary to make other Smart Fields.

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Injections	×					Short Text Field	
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Consent for Injection	×					Switch	GND
Lumbar Facet Joint Injections	×					Single Select	
Trigger Point Injection Form	×					Multiple Select	
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Now when you flip the switch on your clinical note, all associated fields will appear for you to fill out. If you then set the switch as **OFF**, all the filled information in the associated fields will remain but the clinical note text that otherwise would generate, would not appear in your clinical note.

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Schedule Clinical Patients Reports	Billing Account Marketplace Help 💲 🗙	Search 🚺 🧐 🌉 🕇
H&P SOAP ADDITIONAL APPS	View Appointment	Quick History Copy Previous Note -
Preview Note	Sample Patient (Male   30 years   11/05/1991   PASA000010 )	Brendan Wilberton   11/29/2021
Sample Switch Form	Chief Complaint	
Medicare Annual Wellness	Primary Insurer: (60054) Aetna Health Plans	
Injections		
Allergy Shot	L∰ Growth Charts ♥ Vi	fitals A Print section A Fax section
Consent for Injection	No Include in Note *Add to	o note" must be checked for this to render.
Lumbar Facet Joint Injections		
Trigger Point Injection Form	Smart Field 1	
CERVICAL SPINE ASSESSMENT	OFF	
Work/School Excuse Form	Smart Field 2	
Sample Form	OFF	
Billing Codes to Forms Sample	Notes Default Large X-Large	Macros -
Eye Exam	Loroo noume raite v.raite	
Consent Practice Demo		

Creating a switch within the OnPatient Check-In form: Customizing the OnPatient Onboarding/Check-In Interface

It is important to note that, switch fields do not operate as required fields during patient check-in. Required switch fields are only validated as required when signing and locking the clinical note.