

How do I use reference fields in the Form Builder?

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In the Form Builder, reference fields allow you to cross-reference fields across different templates or within the same template. The purpose of reference fields is to easily pull values entered in a different field and have those values show up in a different section of your clinical note.

Possible uses include:

- An OnPatient template is filled out by the patient during the onboarding process. During the appointment, you can have a field that generates their response to your follow-up questions.
- If you have a template that generates text for the purpose of printing a prescription or lab order, you can generate text from your clinical templates and then select print.
- If you would like multiple instances of a value entered in your clinical notes, reference fields allow you to easily generate additional instances out of the section where the value was originally entered.

Note: Reference fields can only pull values from Short Text, Single, and Multiple Select Fields.

Reference Field Setup

1. To begin with reference fields, navigate to your form builder (**Clinical > Form Builder**). Before you add reference fields to a template, make sure that you have a field or template set up that you would like to pull values from.

The screenshot displays the 'Form Builder' interface. On the left is a 'Form List' pane with a search bar and a list of forms including 'Consent for Injection', 'Work/School Excuse Form', 'Eye Exam', 'Sample Form', 'Billing Codes to Forms Sample', 'Trigger Point Injection Form', 'Lumbar Facet Joint Injections', 'CERVICAL SPINE ASSESSMENT', 'Consent Practice Demo', 'Consent Free Draw 2', and 'Physical Exam Multiple Select'. The 'Eye Exam' form is selected and highlighted. The main area shows the 'Eye Exam' form with various fields: 'Eye Exam Performed Today?' (YES/NO), 'Visual Acuity OD' and 'Visual Acuity OS' (Single Select), 'Pinhole OD' and 'Pinhole OS' (Single Select), 'Afferent Pupillary Defect OD' and 'Afferent Pupillary Defect OS' (YES/NO), 'Dilated OD' and 'Dilated OS' (YES/NO), 'IOP OD' and 'IOP OS', and 'CVF OD' and 'CVF OS'. A black arrow points to the 'Visual Acuity OS' field. On the right is the 'Form Tools' pane with a 'Field Clipboard' tab. It contains a list of field types: 'Short Text Field', 'Yes / No', 'Switch', 'Single Select', 'Multiple Select', 'Free Draw', 'Fraction Field', 'Header', 'Subheader', and 'Reference Field'. The 'Reference Field' option is highlighted with a blue border. At the top right of the interface is a legend with icons for 'Edit', 'Move', 'Copy to clipboard', and 'Archive'.

2. When that field is set up, select a reference field from the right-hand **Form Tools** pane and click the desired location for the reference field on the form.

Form Tools

New Fields
Field Clipboard

New Section
SOAP Section

Short Text Field □

Yes / No Y N

Switch ON

Single Select ✓

Multiple Select ✓ ✓

Free Draw

Fraction Field □/□

Header

Subheader

Reference Field ↔

3. Click the field to set up your reference field. Under the reference section, select the template your desired field is located.

Edit Field ✕

Label Name Try to keep it short!

Wide field Required field

Reference [Choose Form] Use current form

Spacing within note New Line New Paragraph

Generated text

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

Header Subheader Bold Italic Underline x₂ x²

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

{{value}}

Reference fields require a form to refer to. Cancel Update field

Edit Field ✕

Label Name Try to keep it short!

Wide field Required field

Reference Eye Exam

[Choose Field]

Spacing within note New Line New Paragraph

Generated text

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

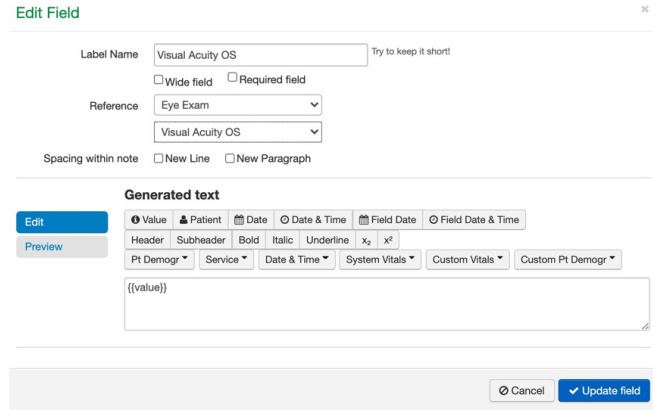
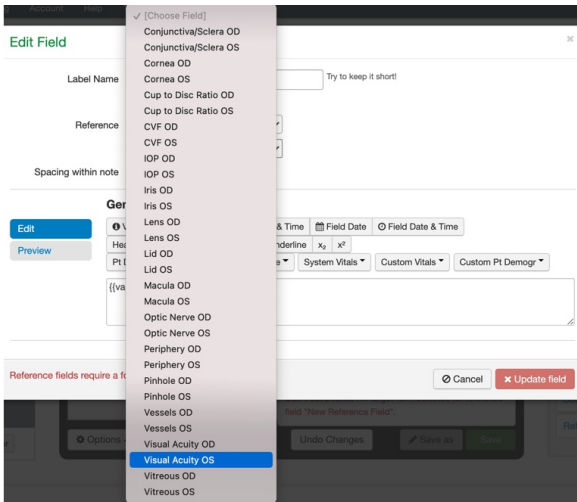
Header Subheader Bold Italic Underline x₂ x²

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

{{value}}

Reference fields require a form and field to refer to. Cancel Update field

4. Then in the field below, select the field your value is pulled from. Now, when you enter in, the text generated will be identical to the text generated with the field from the original field. Click **Update Field**.



5. When the field editor closes, be sure to also select **Save** on your form.

Eye Exam *

Macula OS WNL? <input type="checkbox"/> YES <input type="checkbox"/> NO	Macula OS <input type="text" value="Multiple Select"/>
Vessels OD WNL? <input type="checkbox"/> YES <input type="checkbox"/> NO	Vessels OD <input type="text" value="Multiple Select"/>
Vessels OS WNL? <input type="checkbox"/> YES <input type="checkbox"/> NO	Vessels OS <input type="text" value="Multiple Select"/>
Periphery OD WNL? <input type="checkbox"/> YES <input type="checkbox"/> NO	Periphery OD <input type="text" value="Multiple Select"/>
Periphery OS WNL? <input type="checkbox"/> YES <input type="checkbox"/> NO	Periphery OS <input type="text" value="Multiple Select"/>
Visual Acuity OS <input style="width: 100%;" type="text"/>	

Options ▾
Undo Changes
 Save as
Save