

# The Many Ways You Can Start Charting

07/24/2024 9:41 pm EDT

We want to make it easy for our providers to start charting a patient's clinical note so we've put it in multiple places so you don't have to navigate away from pages to start charting.

Here's how you can start charting through DrChrono:

## Through the Appointment Screen

Open an appointment window and click **View Clinical Note**.

**Schedule Appointment**

**Appointment** | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type  Appointment  Video Visit  Walk-in  Transition of Care  Referral

**WARNING: This patient is pre-populated sample data.** Patient Statement Balance: **\$350.00** [Generate Statement](#) Balance: **\$350.00** 11 past appointments

Primary Insurance: UnitedHealthcare [87726]

Provider: Brendan Wilberton

Patient: Michelle Harris - 10/14/1999

Reason:

Scheduled: 03/31/2021 Time 12:20PM

Duration: 30 minutes  Allow overlapping

Notes:

Consent Forms:

Office: Primary Office

Profile: -----

Eligibility Profile: -----

Exam: Exam 1

Color: [Yellow]

Status: [Dropdown]

0h 1m

[View Clinical Note](#)

[View All Appointments](#)

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.  
 Arrange a Follow-up Reminder  
 View Active Reminders:

[Delete](#) [Save & Close](#) [Save](#) [Cancel](#)

## Through the Patient Chart

Navigate to the patient's chart and select the **Appointments** section on the left. Click **Edit Note** next to the appointment for the clinical note you want to open.

Schedule Clinical Patients Reports Billing Account Help

Michelle Harris | Female | 21 years old | Oct. 14, 1999 | HAM1000005

Phone: (650) 215-6343 Email: Missing Date Added: Nov. 3, 2020  
 Address: 1001 N Rengstorff Ave Mountain View, CA 94040 Last Scheduled Appt: Wed Mar 31, 2021  
 CDS: Adult Immunization Schedule Age: 19-21 Next Scheduled Appt:

New Referral Fax Demographics Print Demographics Vitals Schedule New Appointment

**Appointments**

**Future Appointments**

Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Address	Appointment Status	Profile	Actions
No Future Appointment									

**Past Appointments**

Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Appointment Status	Billing Status	# Reminders	Profile	Actions
Wed Mar 31, 2021 12:20p.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Fri Mar 26, 2021 12:30p.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Thu Feb 04, 2021 8:25a.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Wed Feb 03, 2021 8:10a.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Thu Dec 17, 2020 8:10a.m.	James Smith			Primary Office	Exam 1	ready to audit		0		Edit Appointment View Note
Mon Dec 07, 2020 10:00a.m.	Brendan Wilberton			Primary Office	Exam 1		Balance Due	0		Edit Appointment Edit Note

## Through the Clinical Note Section

Go to Clinical > Clinical Notes.

Clinical Patients Reports

**FORM TOOLS**

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons
- Document Management

---

**CLINICAL**

Clinical Notes

- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

Click **Start Note** to begin a new note. Click **Edit Note** to continue with a note that has already been started.

SOAP Notes Clinical Report

Offices: Primary Office, Telehealth

Doctors: James Smith, Brendan Wilberton

Locked Status:  Need supervising  Need rendering  Exclude Cancelled, No-Show, and Rescheduled

Patient's Name: User's Name Contains Text 03/25/2021 04/01/2021 Refresh

Export Report To Excel Print non-blank Clinical Notes in Report Bulk Lock Notes

Patient	Date	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	Actions
Michelle Harris	03/31/2021 12:20 PM	Brendan Wilberton	No	Not Needed	Start Note
Jenny (Jeri) Harris	03/30/2021 01:36 PM	Brendan Wilberton	No	Not Needed	Edit (4108)
Michelle Harris	03/28/2021 12:30 PM	Brendan Wilberton	No	Not Needed	Start Note
Homer J. Simpson	03/26/2021 09:30 AM	Brendan Wilberton	No	Not Needed	Start Note

## Through the EHR app for iPad and iPhone

Select the desired appointment, and tap **Start Visit**.

