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 App | ointment | | | | | | | | | | ж |
|--|-----------------|-----------------|---------------|---------------|---|-------------------|------------------|--------------------------|------|-------------------|---|
| Appointment | Billing | Eligibility | Vitals | Growth | charts Flags | Log Comm. | Revisions | Custom | Data | MU Helper | |
| Тур | oe 💿 Appoint | tment OVi | deo Visit | U Walk-in | Transition of C | are 🗌 Referra | I | | | | |
| WARNING: This | patient is pre- | populated san | nple data. | Patient State | ment Balance: \$350 | .00 Generate Stat | ement Balan | <mark>ce:</mark> \$350.0 | 0 11 | past appointments | |
| Primary Insuran | ce: UnitedHea | Ithcare [87726] | 1 | | | | | | | | |
| Provider | Brendan Wi | ilberton | ~ | | | | | | | | |
| Patient | Michelle Har | ris - 10/14/19 | 99 🕂 🕇 | / C | Offic | e: Primary Of | fice | • | + 🥖 | | |
| Reason: | | | | | Profil | e: | | ~ | | | |
| | | | | 1 | Eligibili Profil | - | | ~ | | | |
| Scheduled: | 03/31/2021 | Time 12: | 20PM : | ÷ | Exar | n: Exam 1 | | ~ | | | |
| Duration: | 30 minu | ites 🗌 Allow | overlapping | | Cold | r: | | | | | |
| Notes: | | | | | Statu | s: | | ~ | | | |
| | | | | / | | 0h 1m | | | | | |
| Consent Forms: | | | | _ | | 🕑 Vie | ew Clinical Note | Ð | | | |
| Forms. | | | | | | View A | All Appointment | ts | | | |
| Recurring App Arrange a Follo View Active Re | ow-up Remind | | ment cannot t | | a recurring series. ave & Close Save | Cancel | | | | | |
| | | | | Delete | ave a 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 Pa | tients Reports | Billing Accou | nt Help | \$ X | | | | | | | | | | | Searc | :h | _ 29 1 |
|----------------------|---|---------------------|-------------|---|-------------------------------|--------------|-----------------|------|----------------|---------------|--------------------|----------------|------------|---------|----------|-------------------|----------------|
| + Add new patien | Michelle Harris (Female 21 years old Oct. 14, 1999) | | | | | | | | | | HAMIODO | | | | | | |
| Demographics | | | | Phone: (650) 215-6343 Email: Missing Date Added: Nov. 3, 2020 | | | | | | | | | | | | | |
| ppointments | - | 1 in | | Addres | IO01 N Rengs Mountain View | | | | Scheduled Ap | pt: Wed Mar 3 | 1, 2021 | | | | | | |
| linical Dashboard | | | | CD | S: Adult Immun | zation Scheo | dule Age: 19-21 | | oonounou rq. | pu | | | | | | | |
| ocuments | | New Referral | Fax Demogr | raphics 🔒 Prir | t Demographics | | | | | | | | | • | ♥ Vitals | + Schedule N | ew Appointme |
| ligibility | | | | | | | | | | | | | | | | | |
| asks | 0 | | | | | | | | | | | | | | | | |
| oblem List | 3 | Future Appoi | ntments | | | | | | | | | | Edit No | nte | | Print Fut | ture Appointme |
| edication List | 0 | Scheduled Time | | Provider | Reason | Notes | Office | Exam | n Room | Address | Appointment | Ste | _GITC T IN | 5105 | | Profile | Actions |
| | - | No Future Appointr | ment | | | | | | | | | | | | | | |
| end eRx | | | | | | | | | | | | | | | | | |
| llergy List | NKDA | Past Appoint | ments | | | | | | | | | | | | | | Print His |
| rug Interactions | 0 | | | | | | | | | | | | | | | | |
| OMs | | Scheduled Time | | Provider | Reason | | | | Office | Exam Room | Appointment Status | Billing Status | | Profile | | | |
| | | Wed Mar 31, 2021 | | Brendan Wilberton | | | | | Primary Office | Exam 1 | | | 0 | | | Edit Appointment | |
| take Data | | Fri Mar 26, 2021 12 | 2:30p.m. B | Brendan Wilberton | | | | | Primary Office | Exam 1 | | | 0 | | | Edit Appointment | C Edit Note |
| b Orders | | Thu Feb 04, 2021 8 | 8:25a.m. B | Brendan Wilberton | | | | | Primary Office | Exam 1 | | | 0 | | | Edit Appointment | C Edit Note |
| munizations | | Wed Feb 03, 2021 | 8:10a.m. B | Brendan Wilberton | | | | | Primary Office | Exam 1 | | | 0 | | | Edit Appointment | C Edit Note |
| | | Thu Dec 17, 2020 8 | 0.10 | lames Smith | | | | | Primary Office | Exam 1 | | ready to audit | 0 | | | Edit Appointment | |
| Growth Charts | | 110 Dec 17, 2020 0 | s: iua.m. J | arries orniur | | | | | r may onee | | | , | | | | e con appointment | View Note |

Through the Clinical Note Section

Go to Clinical > Clinical Notes.

| Clinical | Patients | Reports |
|-----------|------------|---------|
| FORM TOO | LS | |
| Form Buil | der | |
| Library | | |
| Archive | | |
| Form Rec | order | |
| Complete | Note Forma | t |
| onpatient | Forms | |
| Macro Bu | ttons | |
| Documen | t Manageme | nt |
| | | |
| 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 | | | | Edit Selection |
| Primary Office, Telehealth | | | | |
| Doctors | | | | Edit Selection |
| James Smith, Brendan Wilberton | | | | |
| | | | Start Note | |
| Locked Status Need supervising Need rendering | Exclude Cancelled, No-S | how, and Rescheduled | Edit (4108) | View Last: Day Week Month Year |
| Patient's Name 🔸 User's Name Contains Text | 03/25/2021 04/01/2021 | Refresh | Start Note | |
| Export Report To Excel Print non-blank Cilnical Notes in Report Bulk Lock Note | s | | Start Note | PAGE 1 OF 1 |
| Patient Date & | Rendering Provider | Locked (Rendering Signed) | Supervising Signed Off | |
| Michelle Harris 03/31/2021 12:20 PM | Brendan Wilberton | No | Not Needed | Start Note |
| Jenny (Jen) Harris 03/30/2021 01:36 PM | Brendan Wilberton | No | Not Needed | Edit (4108) |
| Michelle Harris 03/26/2021 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**.

| | | | | হ প 100% 🕶 | 📲 Verizon 🗢 | 2:22 PM | | 76% 🗖 | |
|------------------|----------------|--|---|-------------|---------------------------------------|----------------|------------|------------|--|
| ters (1) Today | ۍ _۲ | | | Q + | く Back | | • | i ∎ | |
| Search Appointme | ent | Jenny (Jen) Harris (Fen | | í | Jenny | y (Jen) Harris | | | |
| /11/2020 Fri | | This is a sample patient. To turn | off sample patients, go to the Account tab. | | Femal | e 41 | | | |
| Jenny (Jen) H | | Appointment Options Sup | er Bill Vitals | Start Visit | 02/11/ | 1980 | | | |
| 09/11 12:15РМ | Exam 1 | Appointment Notes | | | Super Bill Vi | tals | | (i | |
| Michelle Harris | ris | Tap here to add a note | | | | | | | |
| 09/11 12:30PM | Exam 1 | Appointment Details | | Start Visit | | | | | |
| | | 09/11 12:15PM | | | Appointment [| Details | | | |
| | | Appointment profile 😑 None Selected | Appointment Status History None Selected | | 03/30 01:36PM, | 30 minutes | | | |
| | | Office Primary Office | Exam Room Exam 1 | | | | | | |
| | | Provider Brendan Wilberton | Billing Type ICD-10 | | Appointment Pro | ofile | | | |
| | | Billing None | | | Appointment Sta | itus | | | |
| | | Billing Details | | | Appointment Sta | tus History | | | |
| | | Payment profile Insurance | Billing Status None Selected | | Office | | Primary Of | fice | |
| | | Co-Pay \$20.00 | Total Payment Add History \$0.00 | | Exam Room | | Exa | m 1 | |
| dr chro | | Patient Flags | | View All | Provider | Brer | dan Wilber | ton | |
| | | | | | · · · · · · · · · · · · · · · · · · · | 18 | V-3 | Q | |
| () Dasl | hboard | dr EHR Messages | Tasks A | ccount | Appointments Patients | s Messages | Tasks | Accou | |