How do I copy a previous note?

07/24/2024 3:50 pm EDT

You can easily copy a note from a previous visit to make the charting process more efficient. Here's how:

1. Click on a patient's appointment in the calendar. Click the green View Clinical Note button.

Schedule Appointment *												
Appointment	Billing	Eligibility	Vitals	Growth	charts	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 James Smith												
Patient	Michelle Har	ris - 10/14/199	99 🕂 🕇	1		Office:	Primary Off	ice	~	+ 🥖		
Reason:						Profile:			~			
						Eligibility Profile:			~			
Scheduled:	03/31/2021	Time 12:	20PM	÷		Exam:	Exam 1		~			
Duration:	30 minu	utes 🗌 Allow	overlapping			Color:						
Notes:						Status:			~			
				/			0h 1m					
Consent							🕞 Vie	w Clinical Note	Э			
Forms.							View A	II Appointment	ts			
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												

2. Click **Copy previous note** on the upper right corner of the screen. There will be a drop-down list of previous notes to select from.

Schedule	Clinical	I Patients I	Reports	Billing	Account	Help	ŧ X							Se	earch	\$ ⊵₂⁰ =₽ +
H&P	SOAP	ADDITIONAL	APPS										View Appoint	tment	Quick History	Copy Previous Note -
onpatient CC / Histo Med / Far Medicatio Review of	Preview Note Onpatient / Check-In CC / History of Present Illness Med / Fam / Social History Medications & Allergies Review of Systems				No	Include	Misty F Zoom C	Fields (M	Vale 33 ent	years 08/10	3/1987 F	12/07/2020 First visit wi 12/02/2020 Migraine 11/10/2020 First visit wi 11/03/2020 Zoom Call w	ith office ith office with patient	*Add to	note" must be che	No status available Martyna Somerville No status available Martyna Somerville No status available Martyna Somerville No status available Martyna Somerville
Assessme	ent				Past Medica Please selec	I History t at least one	option									
Billing	Billing				What brings you in today?						Duration Please select one option					
					C/C in the pa	atient's own	words					Chief Complain Please select at	t t least one option			

3. Select the desired sections to copy or click **Copy entire note.** Click **Confirm**.

Schedule Clinical Patients	Reports Billing Account Help			Search	\$ 🗠 🎫 🕂							
H&P SOAP ADDITIO	Appointment 11/10/2020			×	istory Copy Previous Note -							
Preview Note	Select entire note											
onpatient / Check-In												
CC / History of Present Illness Med / Fam / Social History Medications & Allergies Review of Systems Physical Exam	H&P CC / HPI M / F / S History Review of Systems Physical Exam Assessment Plan	SOAP Subjective Subjective Assessment Plan	Other onpatient Vitals	Chief Complaint Billing Amendments	Print section Fax section							
Assessment Plan Billing	Additional	onpatient Reasons For Visit (Replaced at 08-05-2020 11:00:46)	X-ray Order onpatient review of systems	3								
	Allergy Shot		Excuse Slip Letter	Cancel Confirm								
	Following up on:		Followup free text									