

# 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 | 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: James Smith

Patient: Michelle Harris - 10/14/1999

Reason: [Text Area]

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

Duration: 30 minutes  Allow overlapping

Notes: [Text Area]

Consent Forms: [Text Area]

Office: Primary Office

Profile: [Dropdown]

Eligibility Profile: [Dropdown]

Exam: Exam 1

Color: [Color Picker]

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

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 Patients Reports Billing Account Help

Search

H&P SOAP ADDITIONAL APPS

View Appointment Quick History **Copy Previous Note**

**Misty Fields** (Male | 33 years | 08/13/1987 | F)

Zoom Call with patient

12/07/2020 First visit with office No status available Martyna Somerville  
12/02/2020 Migraine No status available Martyna Somerville  
11/10/2020 First visit with office No status available Martyna Somerville  
11/03/2020 Zoom Call with patient No status available Martyna Somerville

No Include in Note \*Add to note\* must be checked for this to render.

Past Medical History Please select at least one option

What brings you in today? [Text Area]

Duration Please select one option

C/C in the patient's own words [Text Area]

Chief Complaint Please select at least one option

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

