Exclude Clinical Notes from an Appointment

Last modified on 07/09/2025 8:25 am EDT

> This feature is being gradually rolled out to users starting July 21 and will be available to all users by August 15.

Users have the flexibility to exclude clinical notes from specific appointments, offering practices greater control over their billing workflows. This feature is designed to streamline administrative processes by enabling healthcare providers to finalize billing and coding tasks without the need for clinical documentation at that stage. This option ensures that billing cycles are not delayed by incomplete or pending clinical notes, providing a more seamless and timely experience for both providers and patients.

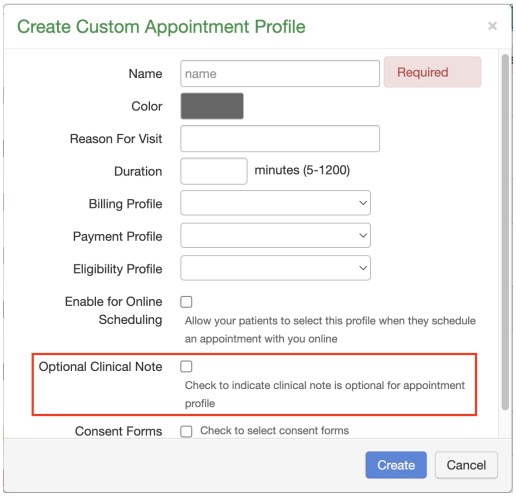
Web

Creating a Custom Appointment Profile

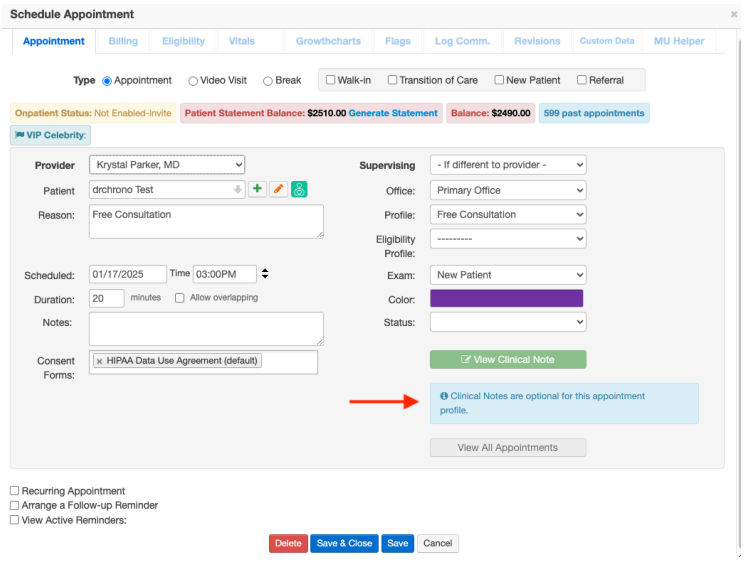
When a user creates a new appointment profile, an "Optional Clinical Note" field will be available, featuring a checkbox.

- If the checkbox is selected, the clinical note will be optional for that appointment.
- If the checkbox is left unselected, the clinical note will be required for the appointment.

To create a custom profile, navigate to Account > Custom Fields > Appointment Profiles.



In the appointment window, a notification will appear stating, "Clinical Notes are optional for this appointment profile." However, the user can still click the clinical note button to open the clinical notes screen and enter information into the forms as they normally would.

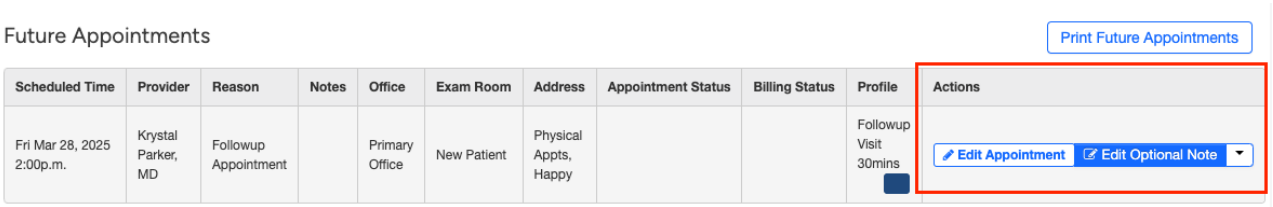


Appointment Section in Patient Chart

Users are able to see which past or future appointments have an optional clinical note on the Appointments tab within the patient chart for past and future appointments.

Users can click on the "Edit Optional Note" button to edit the clinical note and will be redirected to the clinical note screen. The clinical note will remain optional and unlocked for this appointment.

If the optional clinical note was signed and locked, the user will see a "View Optional Note" button, but will remain optional for this appointment. When users clicks on the "View Optional Note" button, they will be redirected to the preview note screen for the locked clinical note.

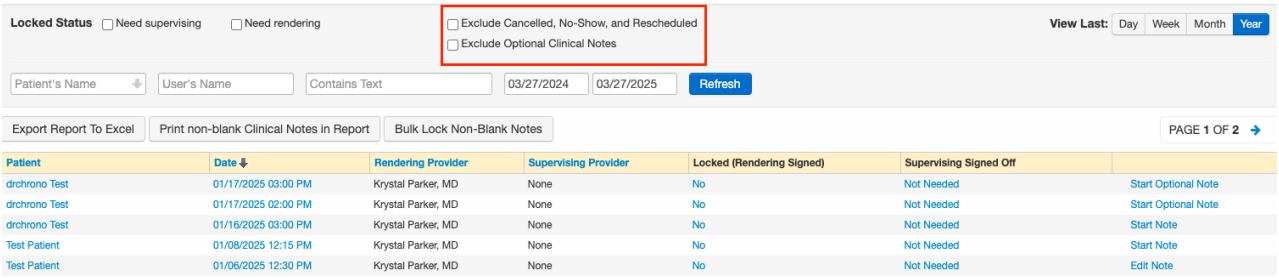


Clinical Notes Bulk Lock

The Clinical Notes Bulk Lock screen will exclude appointments associated with profiles that have the "Optional Clinical Note" setting enabled, as well as blank clinical notes. Bulk locking will only apply to clinical notes containing content in the forms.

Users can also select the filter Exclude Optional Clinical Notes from the clinical notes screen.

To bulk lock clinical notes, navigate to Clinical > Clinical Notes.



Mobile

Search patient's name via search option  or appointment list.

Tap patient's name to display dropdown menu.

Tap appointment list.

Users can see which past or future appointments have an optional clinical note on the Appointments list screen. The clinical note will remain optional for this appointment.

Users can tap the "Optional Note" button to open and edit the clinical note. The clinical note will remain optional and unlocked for this appointment.

