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.

Create Custom Appointment Profile					
Name	name Required				
Color					
Reason For Visit					
Duration	minutes (5-1200)				
Billing Profile	~				
Payment Profile	~ ·				
Eligibility Profile	~				
Enable for Online Scheduling	Allow your patients to select this profile when they schedule an appointment with you online				
Optional Clinical Note	Check to indicate clinical note is optional for appointment profile				
Consent Forms	Check to select consent forms				
	Create	el			

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.

ointment	Billing	Eligibility	Vitals	Grow	thcharts	Flags	Log Comm.	Revisio	ns Custom D	ata MU Helper
Тур	e 💿 Appoint	ment OVide	o Visit 🔾	Break	U Walk-in	Trans	ition of Care	New Patie	ent 🗌 Referra	ł
itient Status	Not Enabled-	Invite Patient	Statement Ba	alance: \$25	510.00 Gener	ate Statem	ent Balance:	\$2490.00 5	99 past appointr	nents
P Celebrity:										
Provider	Krystal Park	er, MD	~		Su	pervising	- If different	to provider -	~	
Patient	drchrono Tes	it	++	1		Office:	Primary Offi	се	~	
Reason:	Free Consult	ation				Profile:	Free Consul	tation	~	
						Eligibility Profile:			~	
heduled:	01/17/2025	Time 03:0	PM 🗘			Exam:	New Patient		~	
Duration:	20 minu	tes 🗌 Allow o	verlapping			Color:				
Notes:						Status:			~	
Consent	× HIPAA Dat	a Use Agreemer	t (default)				G? Viev	v Clinical Not	e	
					_		Clinical N profile.	otes are optior	nal for this appoin	tment
							View Al	I Appointmen	its	
curring Appo ange a Follo	intment w-up Remind	er								

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.

Future Appointments Print Future Appointments										
Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Address	Appointment Status	Billing Status	Profile	Actions
Fri Mar 28, 2025 2:00p.m.	Krystal Parker, MD	Followup Appointment		Primary Office	New Patient	Physical Appts, Happy			Followup Visit 30mins	Edit Appointment Z Edit Optional 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.

Locked Status Need supervising Need rendering			ancelled, No-Show, and Reschedu otional Clinical Notes	View Last	t: Day Week Month Year				
Patient's Name User's Name Contains Text 03/27/2024 03/27/2025 Refresh									
Export Report To Excel Print non-blank Clinical Notes in Report Bulk Lock Non-Blank Notes PAGE 1 OF 2									
Patient	Date 4	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off				
drchrono Test	01/17/2025 03:00 PM	Krystal Parker, MD	None	No	Not Needed	Start Optional Note			
drchrono Test	01/17/2025 02:00 PM	Krystal Parker, MD	None	No	Not Needed	Start Optional Note			
drchrono Test	01/16/2025 03:00 PM	Krystal Parker, MD	None	No	Not Needed	Start Note			
Test Patient	01/08/2025 12:15 PM	Krystal Parker, MD	None	No	Not Needed	Start Note			
Test Patient	01/06/2025 12:30 PM	Krystal Parker, MD	None	No	Not Needed	Edit Note			

Mobile

Search patient's name via search option *Q* 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.

10:41PM Sun Mar 23						
Filters 03/21/25			Appointment List			
Q Search Appointmen		Past Appointments		Future Appointments		
03/21/2025 Fri (1) Test (N) Patier	Q Search by D	ate, Provider, Office				
03/21 02:03PM	Fri Mar 21, 2025 No Appointment S No Chief Complai	D2:03PM Status nt		Super Bill Optional Note	Ling Li 6 Reminders Primary Office View Appt)
	Thu Mar 20, 202 No Appointment S No Chief Complai	5 09:27AM Status nt		Super Bill View Note	Ling Li 6 Reminders Primary Office View Appt	
	Wed Mar 19, 202 No Appointment S No Chief Complai	5 05:28PM Status nt		r	Ling Li 6 Reminders Primary Office	