

# Exclude Clinical Notes from an Appointment

Last modified on 03/27/2025 10:22 am EDT

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.

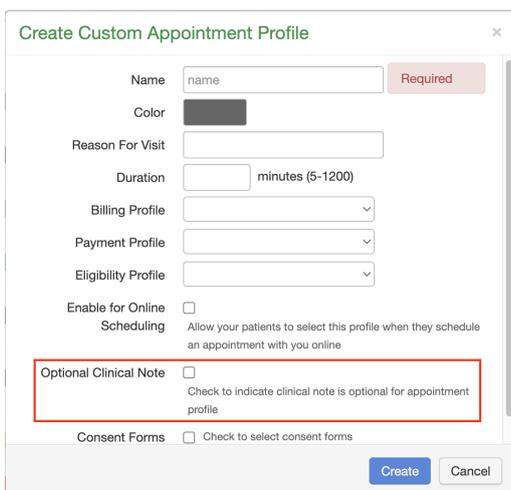
## Web

### 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.



The screenshot shows a form titled "Create Custom Appointment Profile" with a close button (X) in the top right corner. The form contains several fields and checkboxes:

- Name:** A text input field with the placeholder "name" and a red "Required" label to its right.
- Color:** A color selection field showing a dark grey swatch.
- Reason For Visit:** A text input field.
- Duration:** A text input field with the placeholder "minutes (5-1200)".
- Billing Profile:** A dropdown menu.
- Payment Profile:** A dropdown menu.
- Eligibility Profile:** A dropdown menu.
- Enable for Online Scheduling:** A checkbox with the label "Enable for Online Scheduling" and a sub-label "Allow your patients to select this profile when they schedule an appointment with you online".
- Optional Clinical Note:** A checkbox with the label "Optional Clinical Note" and a sub-label "Check to indicate clinical note is optional for appointment profile". This field is highlighted with a red rectangular box.
- Consent Forms:** A checkbox with the label "Consent Forms" and a sub-label "Check to select consent forms".

At the bottom of the form are two buttons: "Create" (in blue) and "Cancel" (in grey).

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.

**Schedule Appointment**

Appointment | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type:  Appointment  Video Visit  Break  Walk-in  Transition of Care  New Patient  Referral

Onpatient Status: Not Enabled-Invite | Patient Statement Balance: \$2510.00 Generate Statement | Balance: \$2490.00 | 599 past appointments

VIP Celebrity:

Provider: Krystal Parker, MD | Patient: drchono Test | Reason: Free Consultation

Scheduled: 01/17/2025 | Time: 03:00PM

Duration: 20 minutes  Allow overlapping

Notes:

Consent Forms:  HIPAA Data Use Agreement (default)

Supervising: - If different to provider - | Office: Primary Office | Profile: Free Consultation | Eligibility Profile: ----- | Exam: New Patient | Color:  | Status:

Recurring Appointment  
 Arrange a Follow-up Reminder  
 View Active Reminders:

## 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

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	<input type="button" value="Edit Appointment"/> <input checked="" type="button" value="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  
  Exclude Cancelled, No-Show, and Rescheduled  
  Exclude Optional Clinical Notes

View Last: 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 ↓	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off	
drchono Test	01/17/2025 03:00 PM	Krystal Parker, MD	None	No	Not Needed	Start Optional Note
drchono Test	01/17/2025 02:00 PM	Krystal Parker, MD	None	No	Not Needed	Start Optional Note
drchono 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  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.

