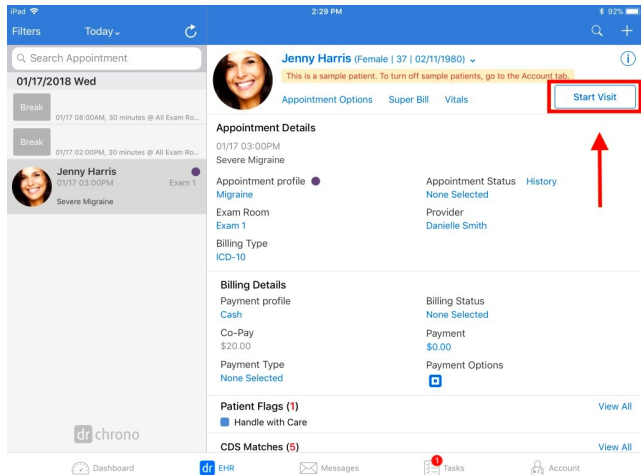


Copying a Previous Note on the iPad

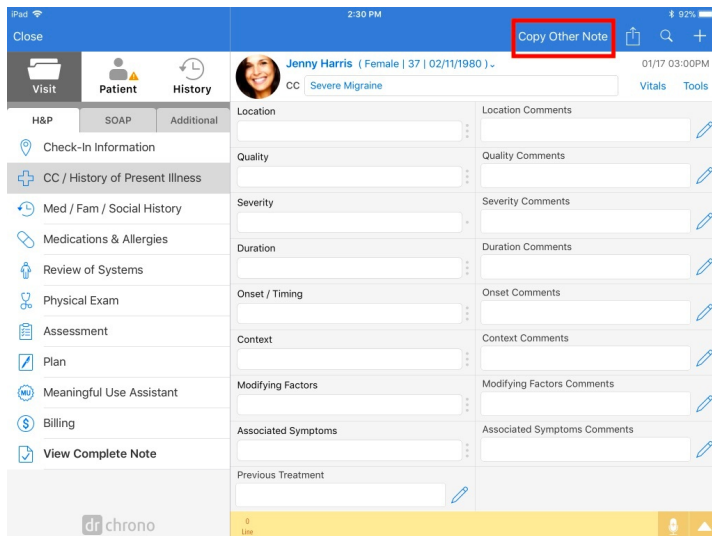
Last modified on 09/25/2025 5:17 pm EDT

You can easily copy a previous note on the iPad app, saving keystrokes and increasing your efficiency.

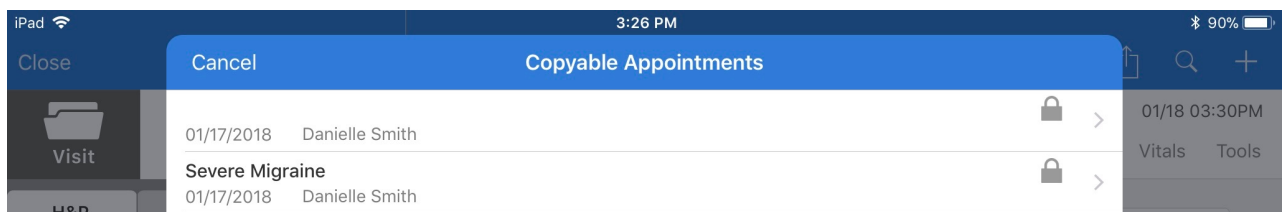
- Once logged into the DrChrono EHR application select the patient and Start Visit.



- Select Copy Other Note.



- Select the desired Copyable Appointment.



- After selecting the Copyable Appointment, a window will appear allowing you to choose which parts of the note to copy, including Clinical Info, H&P, SOAP, and Additional Menu Options. The Copy Previous Note pop-up displays the exact names of forms as they appear in the H&P, SOAP, and Additional tabs within the clinical notes screen. By default, the forms in the Additional section are listed in alphabetical order.
- Select individual forms, or choose all forms for H&P or SOAP notes. Use the options at the bottom to clear or

select all.

- Click Copy this Note to copy the selected content.

The screenshot shows a medical chart interface for a patient named Jenny (Jen) Harris. The interface is divided into a sidebar on the left and a main content area. The sidebar contains navigation options: Visit, Patient, History, Subjective, Objective, Assessment, Plan, Medications & Allergies, Meaningful Use Assistant, and Billing. The main content area displays a SOAP note template. The top section includes a patient header with the name, gender, age, and date of birth, along with a 'Followup Appointment' button. Below this, there are fields for HPI, Family HX, Past Medical HX, Social HX, General, Skin, and HEENT, each with a corresponding comment field. A 'Copy Other Note' button is located at the top right of the main content area.

Copying Previous Notes: Notification Warning

When you copy a previous note, a notification banner will appear with the following message:

"Copying previous note. Please keep this window open until it finishes. You can press ESC to exit early, but the data may not be copied correctly."

This warning helps ensure that the copying process completes properly for accurate data transfer.

The screenshot shows a notification banner for copying a previous note. The banner is yellow and contains the text: "Copying previous note. Please keep this window open until it finishes. You can press ESC to exit early, but the data may not be copied correctly." Below the banner is a red button labeled "Clear all selections". Underneath the button, it says "Select specific sections:" followed by a pink box containing the text: "Amendments has been selected for copying to a future clinical note. Please advise that once confirmed, this cannot be un-done."

Billing Codes

- To copy forward any billing codes documented in the selected appointment to the current appointment with the copy previous note button, please select the checkbox for the billing form.

Appointment 09/11/2025

Select entire note

Select specific sections:

Persistent Forms added to the current appointment's clinical note will use the most recent data rather than the selected appointment's.

Indicates Persistent Form

H&P

☐ CC / History of Present Illness
☐ Med / Fam / Social History
☐ Review of Systems
☐ Physical Exam
☐ Assessment
☐ Plan

SOAP

☐ Subjective
☐ Objective
☐ Assessment
☐ Plan

Other

☐ onpatient Additional Info
☐ onpatient Reasons For Visit
☐ Vitals
☐ Chief Complaint
☒ Billing
☐ Amendments

Additional

☐ Procedures/Copied From .Insert Here(Contd.)

Cancel

Confirm

- Persistent forms will not copy forward the billing codes. You must select the “Billing” option to copy forward billing codes from one appointment to another.