

How do I create a clinical note on the iPad?

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For every appointment scheduled in your EHR, you may easily create a clinical note with the [EHR app](#).

To do so, first access the appointment you wish to create a note for. To search for appointments, select the **EHR** button on your navigation bar. Then browse for your appointment by tapping on **Appointment List** or searching for your appointment using the search tool in the upper right-hand corner of the EHR page.

To begin creating clinical notes, first tap on **Start Visit**.

Once your appointment has been started, to the left of your page you'll be able to view all your templates. The order and content of these templates can be [customized](#) through the web version of your DrChrono EHR. Fill out each template with your appointment information through the various text, switch, toggle, and selection fields your templates have to begin auto-populating your complete note with your visit details.

The screenshot displays the DrChrono EHR app interface on an iPad. At the top, the status bar shows the time as 12:08 PM on Friday, September 11, with a battery level of 100%. The app's header includes a 'Close' button, an 'Include in Note' toggle switch (which is turned on), and icons for help, search, and a plus sign. Below the header, the patient's name 'Jenny (Jen) Harris' is displayed along with her demographic information: Female, 40 years old, born 02/11/1980. The visit date and time are 09/11 12:15 PM. A 'Chief complaint' field is visible with the text 'CC Chief complaint'. The main content area is organized into a grid of templates. On the left, there is a sidebar with navigation options: Visit, Patient, and History. Below these are tabs for H&P, SOAP, and Additional. The sidebar also contains a list of templates: Check-In Information, CC / History of Present Illness, Med / Fam / Social History (which is currently selected), Medications & Allergies, Review of Systems, Physical Exam, Assessment, Plan, Meaningful Use Assistant, and Billing. The main content area contains the following templates: Medical History (with a toggle switch), Past Medical History, Past Medical History Freewrite, Past Surgical History, Comments, Childhood illnesses, Comments, Childhood Immunizations, Comments, Date of last PE, PCP, PCP Contact Information, Family History (with a toggle switch), Father's MH, Comments, and Mother's MH, Comments. At the bottom of the screen, there is a blue button labeled 'View Complete Note' and a yellow bar showing '0 Line'.

After your forms have been filled, select **View Complete Note** at the bottom left-hand side of the page. A clinical note with all the details of your visit is generated with the details you have entered in your templates. If the note is ready to be signed, select **Sign & Lock**.

If the note was signed and locked successfully, you will see a green bar at the top of the page indicating that the

note has been locked. You may unlock the note by tapping on the 'Unlock' button that is now available.

From this point, your note will be uploaded to the cloud and will be viewable in your patient's chart with DrChrono on the web or iPhone. You may then download, print, or fax your complete notes.

The screenshot shows the DrChrono mobile application interface. At the top, the status bar displays the time as 4:23 PM on Tuesday, June 8, and the battery level at 51%. The app header includes a search bar for appointments, a filter dropdown set to 'Today', and a refresh icon. Below the header is a list of appointments for the date 06/08/2021 (Tuesday). The appointments are:

- Evan James, 06/08 09:00AM, Exam 3
- Jenny (Jen) Harris, 06/08 10:30AM, Exam 4 (highlighted)
- Homer J. Simpson, 06/08 11:55AM, Exam 1
- Jenny (Jen) Harris, 06/08 12:00PM, Exam 2
- Jenny (Jen) Harris, 06/08 01:00PM, Exam 1
- Jenny (Jen) Harris, 06/08 02:00PM, Exam 1
- Daniel Kivatinos, 06/08 03:30PM, Exam 2

The right-hand pane displays the details for the selected appointment with Jenny (Jen) Harris. At the top, it shows her profile picture, name, gender (Female), age (41), and date of birth (02/11/1980). A note indicates this is a sample patient. Below this are links for 'Appointment Options', 'Super Bill', and 'Vitals', along with a 'Start Visit' button. The 'Appointment Details' section shows the appointment time (06/08 10:30AM, 75 minutes) and type (New Patient / Initial Visit). It includes sections for 'Appointment profile' (None Selected), 'Appointment Status' (None Selected), 'Office' (Primary Office), 'Exam Room' (Exam 4), 'Provider' (Brendan Wilberton), and 'Billing Type' (ICD-10). A 'Loading...' spinner is visible next to the provider information. The 'Billing Details' section shows 'Payment profile' (Insurance) and 'Billing Status' (None Selected). The 'Patient Flags' section shows 'No Flags'. The 'CDS Matches (2)' section lists two items: '1. Mammogram screening for all women aged 40-74' and '2. Adult Immunization Schedule Age: 27-49'. At the bottom, a navigation bar includes icons for 'Dashboard', 'dr EHR', 'Messages' (with 1 notification), 'Tasks' (with 14 notifications), and 'Account' (with 3 notifications).