

The Many Ways You Can Start Charting

07/08/2024 7:35 pm EDT

We want to make it easy for our providers to start charting a patient's clinical note so we've put it in multiple places so you don't have to navigate away from pages to start charting.

Here's how you can start charting through DrChrono:

Through the Appointment Screen

Open an appointment window and click **View Clinical Note**.

Schedule Appointment

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

Type Appointment Video Visit Walk-in Transition of Care Referral

WARNING: This patient is pre-populated sample data. Patient Statement Balance: **\$350.00** [Generate Statement](#) Balance: **\$350.00** 11 past appointments

Primary Insurance: UnitedHealthcare [87726]

Provider: Brendan Wilberton

Patient: Michelle Harris - 10/14/1999

Reason:

Scheduled: 03/31/2021 Time: 12:20PM

Duration: 30 minutes Allow overlapping

Notes:

Consent Forms:

Office: Primary Office

Profile: -----

Eligibility Profile: -----

Exam: Exam 1

Color: [Orange]

Status: [Dropdown]

0h 1m

[View Clinical Note](#)

[View All Appointments](#)

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
 Arrange a Follow-up Reminder
 View Active Reminders:

[Delete](#) [Save & Close](#) [Save](#) [Cancel](#)

Through the Patient Chart

Navigate to the patient's chart and select the **Appointments** section on the left. Click **Edit Note** next to the appointment for the clinical note you want to open.

Schedule Clinical Patients Reports Billing Account Help

Michelle Harris | Female | 21 years old | Oct. 14, 1999 | HAM1000005

Phone: (650) 215-6343 Email: Missing Date Added: Nov. 3, 2020
 Address: 1001 N Rengstorff Ave Mountain View, CA 94040 Last Scheduled Appt: Wed Mar 31, 2021
 CDS: Adult Immunization Schedule Age: 19-21 Next Scheduled Appt:

New Referral Fax Demographics Print Demographics Vitals Schedule New Appointment

Appointments

Future Appointments

Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Address	Appointment Status	Profile	Actions
No Future Appointment									

Past Appointments

Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Appointment Status	Billing Status	# Reminders	Profile	Actions
Wed Mar 31, 2021 12:20p.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Fri Mar 26, 2021 12:30p.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Thu Feb 04, 2021 8:25a.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Wed Feb 03, 2021 8:10a.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note
Thu Dec 17, 2020 8:10a.m.	James Smith			Primary Office	Exam 1	ready to audit		0		Edit Appointment View Note
Mon Dec 07, 2020 10:00a.m.	Brendan Wilberton			Primary Office	Exam 1		Balance Due	0		Edit Appointment Edit Note

Through the Clinical Note Section

Go to Clinical > Clinical Notes.

Clinical Patients Reports

FORM TOOLS

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons
- Document Management

CLINICAL

Clinical Notes

- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

Click **Start Note** to begin a new note. Click **Edit Note** to continue with a note that has already been started.

SOAP Notes Clinical Report

Offices: Primary Office, Telehealth

Doctors: James Smith, Brendan Wilberton

Locked Status: Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled

Patient's Name: User's Name Contains Text 03/25/2021 04/01/2021 Refresh

Export Report To Excel Print non-blank Clinical Notes in Report Bulk Lock Notes

Patient	Date	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	Actions
Michelle Harris	03/31/2021 12:20 PM	Brendan Wilberton	No	Not Needed	Start Note
Jenny (Jeri) Harris	03/30/2021 01:36 PM	Brendan Wilberton	No	Not Needed	Edit (4108)
Michelle Harris	03/28/2021 12:30 PM	Brendan Wilberton	No	Not Needed	Start Note
Homer J. Simpson	03/26/2021 09:30 AM	Brendan Wilberton	No	Not Needed	Start Note

Through the EHR app for iPad and iPhone

Select the desired appointment, and tap **Start Visit**.

The screenshot shows the iPad interface of the dr chrono EHR app. At the top, the status bar displays '12:19 PM Fri Sep 11'. Below the header, there are filters and a search bar. A list of appointments for '09/11/2020 Fri' is shown, with 'Jenny (Jen) Harris' selected. The main content area displays the patient's profile, appointment notes, and details. A 'Start Visit' button is highlighted with a black arrow. The bottom navigation bar includes 'Dashboard', 'EHR', 'Messages', 'Tasks', and 'Account'.

12:19 PM Fri Sep 11

Filters (1) Today

Search Appointment

09/11/2020 Fri

Jenny (Jen) Harris 09/11 12:15PM Exam 1

Michelle Harris 09/11 12:30PM Exam 1

Jenny (Jen) Harris (Female | 40 | 02/11/1980)

This is a sample patient. To turn off sample patients, go to the Account tab.

Appointment Options Super Bill Vitals Start Visit

Appointment Notes

Tap here to add a note

Appointment Details

09/11 12:15PM

Appointment profile None Selected

Appointment Status None Selected History

Office Primary Office

Exam Room Exam 1

Provider Brendan Wilberton

Billing Type ICD-10

Billing None

Billing Details

Payment profile Insurance

Billing Status None Selected

Co-Pay \$20.00

Total Payment \$0.00 Add History

Patient Flags View All

No Flags

dr chrono

Dashboard EHR Messages Tasks Account

The screenshot shows the iPhone interface of the dr chrono EHR app. At the top, the status bar displays 'Verizon 2:22 PM 76%'. Below the header, there is a back button and a menu icon. The patient's profile is shown, including a 'Start Visit' button. The main content area displays appointment details and a list of options with chevron arrows. The bottom navigation bar includes 'Appointments', 'Patients', 'Messages', 'Tasks', and 'Account'.

Verizon 2:22 PM 76%

Back

Jenny (Jen) Harris

Female 41 02/11/1980

Super Bill Vitals Start Visit

Appointment Details

03/30 01:36PM, 30 minutes

Appointment Profile >

Appointment Status >

Appointment Status History >

Office Primary Office >

Exam Room Exam 1 >

Provider Brendan Wilberton >

Appointments Patients Messages Tasks Account