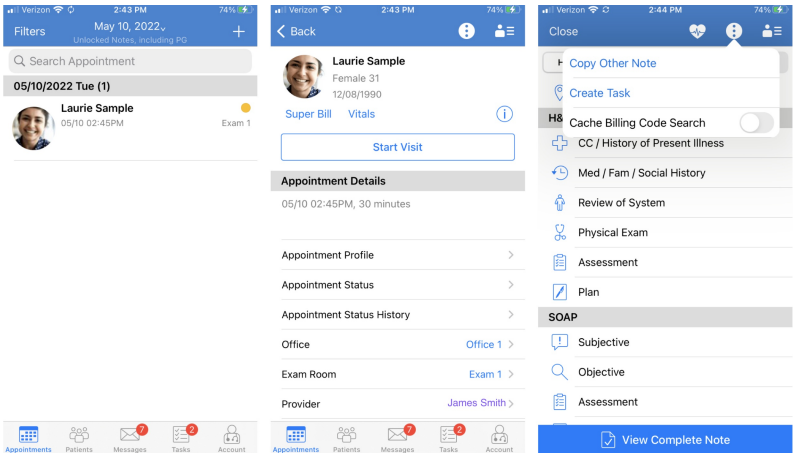
# Copying a Previous Note on the iPhone

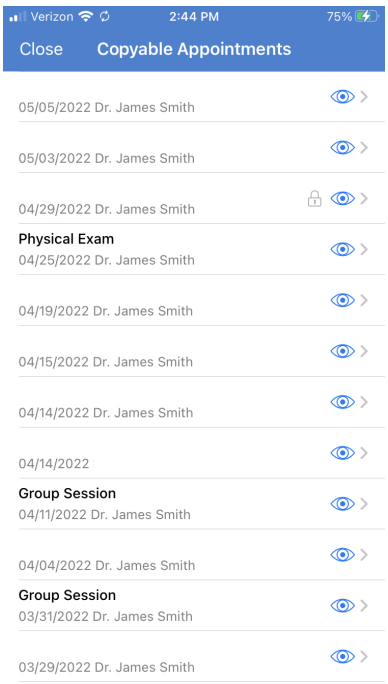
Last modified on 09/25/2025 5:16 pm EDT

You can copy part or all of a previous note when you are charting on your iPhone.

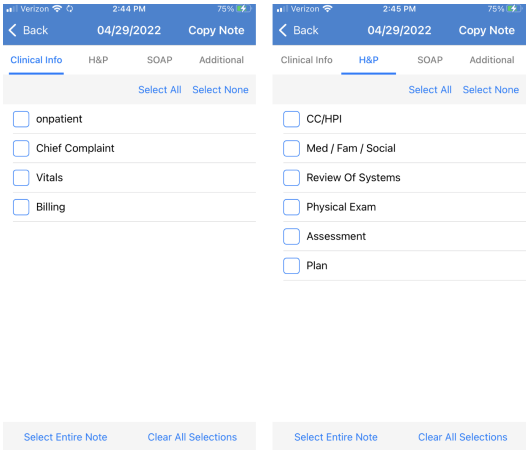
Select the appointment and tap **Start Visit**. To access the copy note menu on the iPhone, tap the menu iconand select **Copy Other Note**.




Select the appointment whose note you would like to copy.



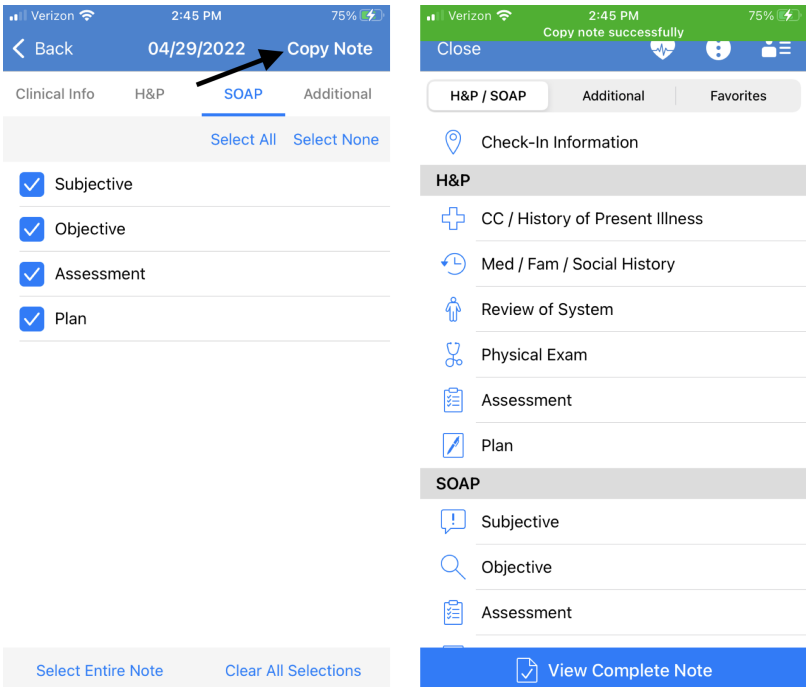

Next, you can select the content you would like to copy from the previous note.




The Clinical Info, H&P, SOAP, or Additional tabs allow you to access any sections previously filled out.

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.

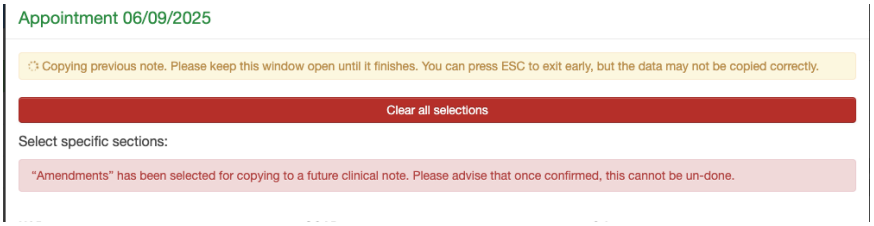
Tap the box next to the section to copy or tap **Select Entire Note**. Select **Copy Note** when finished. You will see a success message at the top of the screen that the previous note has been copied.




## Copying Previous Notes: Notification Warning

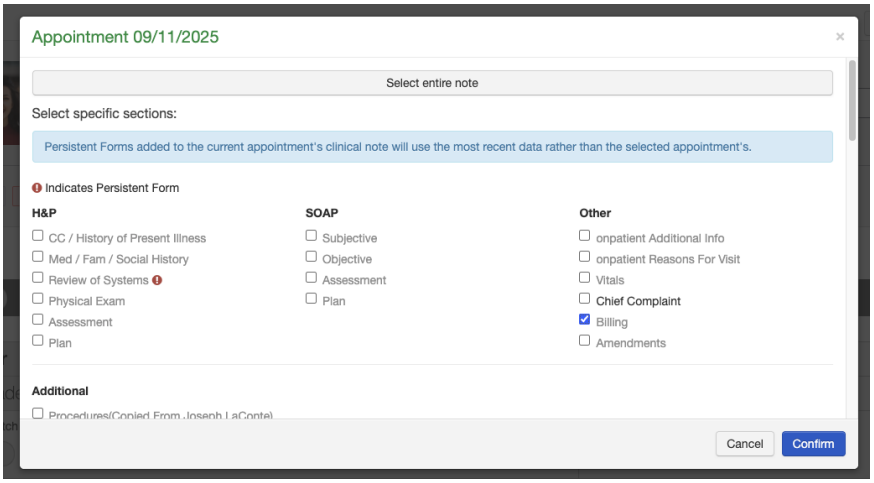
When you copy a previous note, a notification banner will appear with the following message:
*"Copying previous note. Please keep this window open until it finishes. You can press ESC to exit early, but the data may not be copied correctly."*

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




## 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.




- 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.