

Copying a Previous Note (Web)

Last modified on 01/08/2025 9:42 am EST

You can easily copy a note from a previous visit to make the charting process more efficient.

1. Click on a patient's appointment in the calendar. Click the green View Clinical Note button.

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: James Smith

Patient: Michelle Harris - 10/14/1999

Reason: [Text Area]

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

Duration: 30 minutes Allow overlapping

Notes: [Text Area]

Consent Forms: [Text Area]

Office: Primary Office

Profile: [Dropdown]

Eligibility Profile: [Dropdown]

Exam: Exam 1

Color: [Color Picker]

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

2. Click Copy previous note on the upper right corner of the screen. There will be a drop-down list of previous notes to select from.

Schedule Clinical Patients Reports Billing Account Help

Search

H&P SOAP ADDITIONAL APPS

View Appointment Quick History **Copy Previous Note**

Misty Fields (Male | 33 years | 08/13/1987 | F)

Zoom Call with patient

12/07/2020 First visit with office No status available Martyna Somerville

12/02/2020 Migraine No status available Martyna Somerville

11/10/2020 First visit with office No status available Martyna Somerville

11/03/2020 Zoom Call with patient No status available Martyna Somerville

No Include in Note *Add to note* must be checked for this to render.

Past Medical History Please select at least one option

What brings you in today? [Text Area]

Duration Please select one option

C/C in the patient's own words [Text Area]

Chief Complaint Please select at least one option

3. Select the desired sections to copy or click Select entire note.

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.

4. Click Confirm.

Appointment 07/25/2019 ×

Select entire note

Select specific sections:

H&P	SOAP	Other
<input type="checkbox"/> CC / History of Present Illness	<input type="checkbox"/> Subjective	<input type="checkbox"/> onpatient Additional Info
<input type="checkbox"/> Med / Fam / Social History	<input type="checkbox"/> Objective	<input type="checkbox"/> onpatient Reasons For Visit
<input type="checkbox"/> Review of Systems	<input type="checkbox"/> Assessment	<input type="checkbox"/> Vitals
<input type="checkbox"/> Physical Exam	<input type="checkbox"/> Plan	<input type="checkbox"/> Chief Complaint
<input type="checkbox"/> Assessment		<input type="checkbox"/> Billing
<input type="checkbox"/> Plan		<input type="checkbox"/> Amendments

Additional

- Body Images (Multi-Specialty)
- Consent Form Template
- Eyeglass/Contacts Prescription
- Free Type