

Copying a Previous Note (Web)

Last modified on 09/25/2025 5:02 pm EDT

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

- 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:

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: -----

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

- 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

Preview Note

onpatient / Check-In

CC / History of Present Illness

Med / Fam / Social History

Medications & Allergies

Review of Systems

Physical Exam

Assessment

Plan

Billing

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

Zoom Call with patient

View Appointment Quick History **Copy Previous Note**

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?

C/C in the patient's own words

Duration Please select one option

Chief Complaint Please select at least one option

- 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.

- Click Confirm.

Appointment 07/25/2019

Select entire note

Select specific sections:

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

☐ Body Images (Multi-Specialty)

☐ Consent Form Template

☐ Eyeglass/Contacts Prescription

☐ Free Type

Cancel

Confirm

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.

Appointment 06/09/2025

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.

Clear all selections

Select specific sections:

"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	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 checked="" type="checkbox"/> Billing
<input type="checkbox"/> Plan		<input type="checkbox"/> Amendments

Additional

☐ Procedures/Copied From .Joseph J aConte

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.