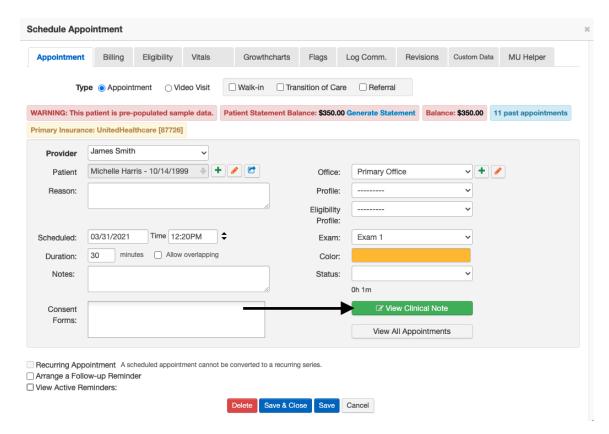
Copying a Previous Note (Web)

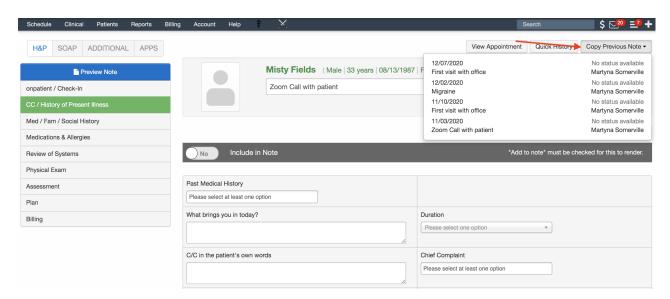
Last modified on 09/25/2025 5:02 pm EDT

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.



• 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.

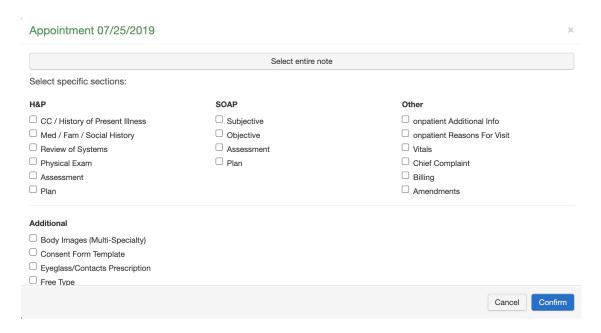


• Select the desired sections to copy or click Select entire note.

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.



Copying Previous Notes: Notification Warning

When you copy a previous note, a notification banner will appear with the following message:

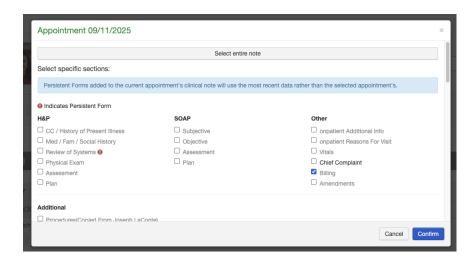
"Copying previous note. Please keep this window open until it finishes. You can press ESC to exit early, but the data may not be copied correctly."

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.