

Printing and Downloading Your Clinical Notes

07/08/2024 8:01 pm EDT

You can print all of the clinical notes for a particular patient or group of patients based on criteria available in the Clinical Notes section of the software.

Follow the steps below to generate a message in your Message Center with the clinical notes available to download and print.

Generating a Printable PDF

- To begin, mouse over the **Clinical** tab in your navigation bar and select **Clinical Notes**.

The screenshot shows a navigation bar with three tabs: 'Clinical' (highlighted in yellow), 'Patients', and 'Reports'. Below the navigation bar is a menu with the following items:

- FORM TOOLS**
 - Form Builder
 - Library
 - Archive
 - Form Reorder
 - Complete Note Format
 - onpatient Forms
 - Macro Buttons
 - Document Management
- CLINICAL**
 - Clinical Notes (highlighted in blue)
 - Audit Log
 - CDS Rules
 - Inventory Management
 - Patient Education Management

You'll be presented with the Clinical Notes Reporting tool. Select any of the offices, physicians, patients, keywords, and/or date range you wish to find clinical notes for and select **Refresh** to view the notes with the specified criteria.

SOAP Notes Clinical Report

Offices: Eastern Office, Main PG Office, Mountain Office, Telehealth

Doctors: James Smith, Brendan Wilberton

Supervisors: Patient's Name

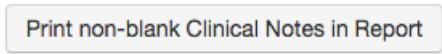
Locked Status: Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled

07/30/2021 08/30/2021 Refresh

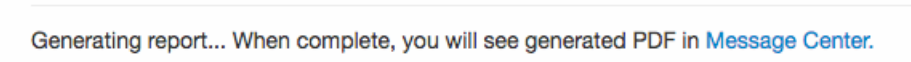
Print non-blank Clinical Notes in Report


Patient	Date ↓	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off
Jenny (Jen) Harris	08/27/2021 09:53 AM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/24/2021 03:49 PM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/18/2021 08:47 AM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/17/2021 10:00 AM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/16/2021 01:21 PM	Brendan Wilberton	None	No	Not Needed
Homer J. Simpson	08/13/2021 10:29 AM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/13/2021 08:20 AM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/11/2021 08:58 AM	Brendan Wilberton	None	No	Not Needed
Jenny (Jen) Harris	08/10/2021 03:47 PM	Brendan Wilberton	None	Signed by Brendan Wilberton	Signed by Brendan Wilberton
Michelle Harris	08/10/2021 02:53 PM	Brendan Wilberton	None	Signed by Brendan Wilberton	Signed by Brendan Wilberton
Michelle Harris	08/09/2021 02:34 PM	Brendan Wilberton	None	Signed by Brendan Wilberton	Signed by Brendan Wilberton
Brendan T. Sample	08/09/2021 01:00 PM	Brendan Wilberton	None	Signed by Brendan Wilberton	Signed by Brendan Wilberton
Jenny (Jen) Harris	08/09/2021 11:40 AM	Brendan Wilberton	None	Signed by Brendan Wilberton	Signed by Brendan Wilberton

When the list of notes is loaded, select the **Print non-blank Clinical Notes in Report** button.



You'll be brought to a page that will display the following message:



To view your report, you may click on the blue Message Center link or click on the Message Center icon () in the right-hand corner.

Viewing, Downloading, and/or Printing Your Clinical Notes PDF

After generating your PDF report with your clinical notes, the PDF will be sent to your message center. In your message center, you should have a message from DrChrono with the title **Generated PDF: soapnotes_date_range.pdf**. Click on this message to view your PDF.


Incoming Messages


From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
drchrono	Generated PDF: soapnotes_2021-07-30_2021-08-31.pdf					Aug. 30, 2021, 11:07 a.m.	Aug. 30, 2021, 11:07 a.m.
Sample Doctor, MD (3018502018)	Incoming Fax					July 29, 2021, 1:44 p.m.	Aug. 24, 2021, 2:01 p.m.
Sample Doctor, MD (3018502018)	Incoming Fax					July 29, 2021, 9:53 a.m.	Aug. 24, 2021, 2 p.m.

When you click on a message with a PDF, the PDF attachment will be displayed in the DrChrono PDF viewer. Here

you can save the attachment to a patient chart, view the document, generate an audit log, add notes, and rotate pages.

The screenshot shows a PDF viewer interface. At the top, there are navigation buttons: "Back to Incoming Messages", "Mark as Unread", "Archive Message", "Print", and "Fax". A search bar for "Search Messages" is on the right. Below this, the PDF title is "Generated PDF: soapnotes_2021-07-30_2021-08-31.pdf" with a "Create task" button. The sender is "From: drchrno" and the date is "Monday, August 30, 2021 11:07 AM". Action buttons include "Save Attachment to Patient Chart", "View Document", and "Audit Log". A "Notes" text area is present. A blue arrow points to a dark overlay containing a download icon (downward arrow), a print icon, and a menu icon (three dots). Below the overlay are "Rotate all pages" controls and "Clockwise" / "Counter Clockwise" buttons. The PDF content shows patient information for "Dr. Nick's Walk-In Clinic" and "Medications & Allergies".

To download, select the download button () on the PDF preview.

To print, select the print button () on the PDF preview.


After selecting print, your printer's print settings popup will appear. Select your desired settings and hit print to print the report with all your clinical notes.

You can also download and print clinical notes from the patient's chart.

Go to the **Documents** section. Select the **Locked Clinical Notes** tab. Click **View Notes** next to the note you would like to print or download.

The screenshot shows a patient chart for "Laurie Sample" (Female, 31 years old, Dec. 8, 1990). The "Documents" section is active, showing "onpatient access enabled", "New Referral", "Fax Demographics", and "Print Demographics" buttons. Below this are tabs for "Uploaded Documents", "Locked Clinical Notes" (highlighted with a black box), "Signed Consent Forms", "Outbound Referrals", "Lab Results", and "Amendments". A "View Notes" button is visible. The "Locked Clinical Notes" table has the following data:

Date of Service	Reason	Locked by	Locked On	Actions
02/24/2022	Diabetes	Dr. James Smith	02/25/2022	Fax Send to onpatient View Notes

To download, select the download button () on the PDF preview.

To print, select the print button (



Click on the PDF preview.

After selecting print, your printer's print settings popup will appear. Select your desired settings and hit print to print the report with all your clinical notes.

The screenshot shows a PDF viewer interface with a dark header. On the left, there is a menu icon and the text "DrChrono". In the center of the header, it displays "1 / 1", a minus sign, "100%", a plus sign, a full-screen icon, and a refresh icon. On the right side of the header, there is a large white arrow pointing right, followed by a download icon, a print icon, and a vertical ellipsis menu icon. The main content area is white and contains a pink square icon with a white heart and a person silhouette. Below the icon, the following information is displayed:

Test Facility		
Patient: Laurie Sample	DOB: 12/08/1990	Sex: F
Provider: Dr. James Smith	Visit: 02/24/2022 9:40AM	Chart: SAJA000001
Primary Payer ID: 87726	Secondary Payer ID:	

Chief Complaint: Diabetes