

Copy Previous Note from a Persistent Form (Clinical Note)

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DrChrono provides users the option to copy a previous note from a persistent form when documenting a clinical note to improve efficiency during a patient's visit. This article details the workflow of this functionality.

What is a persistent form?

When a form is selected to be persistent, the data entered will persist from one visit to the next.

Learn more about [Clinical Form Management](#).

What is the copy previous note functionality?

Users can copy all or selected data from a previous appointment into an existing appointment while charting.

Learn more about [Copying a Previous Note \(Web\)](#).

Copying a note from a persistent form

When a user selects the option to "Copy Previous Note" from a persistent form, a pop-up window will appear. This window will include a header explaining that if a persistent form is copied forward, the data copied will be from the most recent appointment, rather than the selected appointment's date of service (DOS). Additionally, a visual indicator appears in the list of forms to identify which ones are persistent.

Appointment 01/06/2025 ×

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.

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

- Initial Assessment !
- Hamilton Depression Rating Scale
- Medicare Annual Wellness

Cancel Confirm

Let's take a look at an example.

There are three existing appointments for a patient (A, B, and C).

1. Appointments A and B have locked clinical notes.
 2. The user is currently editing the clinical notes for appointment C.
 3. The user clicks on the Copy Previous Note button and selects appointment A to copy from.
 4. Appointment B has the most recent data for the persistent form.
 5. The user selects the persistent form to copy forward from appointment A to appointment C.
 6. Appointment C will have the data from appointment B rather than appointment A because the form selected was persistent.
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