Copy Previous Clinical Note from a Persistent Form

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FAQ- Copy Previous Clinical Note from a Persistent Form

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.

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.