

FAQ- Copy Previous Clinical Note from a Persistent Form

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Learn more about [Copy Previous Note from a Persistent Form \(Clinical Note\)](#)

How do I determine which appointment has the most recently edited version of the persistent form?

Once the "Include in Note" toggle is enabled for a persistent form, that corresponding appointment will hold the most recent version of the persistent form data. Persistent forms will only copy forward the information from the most recently edited version of the form with the "Include in Note" toggle enabled.

What happens if I edit an appointment's persistent form that already has the "Include in Note" toggle enabled, and the following appointment also has the toggle enabled?

The following appointment will hold the most recent version of the persistent note data. When the user selects this form and clicks the copy previous note button, this data will be copied forward to the next appointment.

Why was the copy previous note behavior changed for persistent forms?

Initially, DrChrono sourced the data for persistent notes across the patient's history. However, this introduced discrepancies between each appointment's persistent form data and led to a loss of clarity on where the data was being copied from. With this new feature implemented, we have reformed the DrChrono system to support the intended behavior of persistent forms. Persistent forms should only be used to automatically copy forward "person-level" data from the most recently edited previous appointment.

What is person-level data?

An example of person-level data could include social or family history information, such as the patient's father being diagnosed with type 2 diabetes. This data type should be independent of specific encounters and should not require edits or changes after each appointment.

The appointment I want to copy data from is not the previous appointment for my patient. How can I copy forward data into the current appointment from an older appointment?

To copy forward data from an appointment that occurred further in the past via the [Copy Previous Note](#) button, please make the form non-persistent. If a form is not set to be a persistent form in the Clinical Form Management screen, you can copy forward data from any appointment in the past as long as it has occurred before the current

appointment you are documenting.

Why can't I pick which appointment to copy forward persistent form data from?

DrChrono's persistent forms are designed to carry over data from one appointment to the next, ensuring that the most recent appointment's information is transferred to the following visit's note.

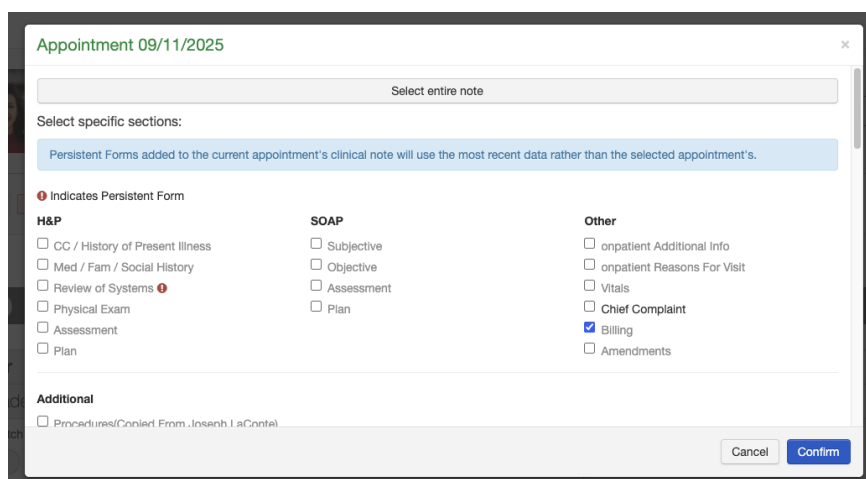
An example would be Past Medical, Family, and Social History data. If you prefer to select a specific past appointment to copy data from, you can disable the Persistent Form setting.

Can I set up a form to be persistent for some patients/providers and non-persistent for other patients/providers?

The best practice for DrChrono Clinical Forms is to configure a form as either non-persistent or persistent and maintain that setting for all patients and providers using the form. Changing the persistence setting can interfere with DrChrono's ability to accurately pull forward data for each patient. If different providers have varying preferences, they should create their version of the form with the appropriate settings.

Can I copy forward 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.



The screenshot shows a dialog box titled "Appointment 09/11/2025" with a close button in the top right corner. At the top, there is a button labeled "Select entire note". Below this, a section titled "Select specific sections:" contains a blue informational message: "Persistent Forms added to the current appointment's clinical note will use the most recent data rather than the selected appointment's." Underneath, a legend indicates that a red circle icon next to a checkbox means "Indicates Persistent Form". The form is organized into three columns: "H&P", "SOAP", and "Other".

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

At the bottom, there is an "Additional" section with a checkbox for "Procedures/Confer From .Insnh.LaConte". The dialog box concludes with "Cancel" and "Confirm" buttons.

- 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.