

FAQ- Copy Previous Clinical Note from a Persistent Form

Last modified on 02/18/2025 12:14 pm EST

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.
