

# Clinical Notes Revision History

Last modified on 06/12/2025 2:03 pm EDT

A revision is saved when you lock the note, add an amendment, and select **Preview Note** when you edit the unlocked note.

## 1. Select Preview Note.

The screenshot shows the top section of a clinical notes interface. On the left, there is a sidebar with tabs for 'H&P', 'SOAP', and 'ADDITIONAL'. Under 'ADDITIONAL', the 'Preview Note' option is highlighted in blue, with a red arrow pointing to it. Other options include 'OnPatient / Check-In', 'CC / History of Present Illness', 'Med / Fam / Social History', 'Medications & Allergies', 'Review of Systems', and 'Physical Exam'. The main area displays patient information for Peter Django (Male | 25 years old | 05/01/2000 | DJPE000001) and Sara Sample | Appt: 04/24/2025. A 'Followup Appointment' field is visible. At the bottom, there are buttons for 'Apple Health App Data', 'Growth Charts', 'Vitals', 'Print section', and 'Fax section'. A 'Yes' radio button is selected for 'Include in Note', with a note that '\*Add to note\*' must be checked for this to render.

## 2. Select Revisions.

The screenshot shows the clinical notes interface with the 'Revisions' tab selected in the top navigation bar, indicated by a red arrow. The status bar at the top reads 'Status: Locked By Rendering Provider and Supervising Provider'. Below this, there are buttons for '+ Amendments', 'Revisions', 'View', 'Fax', 'Unlock', 'Send to OnPatient', and 'Print sections'. A blue banner below the navigation bar says 'To change note format, click on Clinical > Complete Note Format.'. The main content area shows a PDF viewer with two pages, numbered 1 and 2. To the right of the PDF viewer, there is a patient information section for a 'Family Practice' patient named Laura, with details for DOB, Sex, Visit, Office, Address, Primary Payer ID, and Secondary Payer ID. Below this is an 'Assessment' table with columns for Type, Code, and Description.

Type	Code	Description
ICD-10-CM Condition	M06.9	Rheumatoid arthritis, unspecified
ICD-10-CM Condition	Q21.15	Inferior sinus venosus atrial septal defect
ICD-10-CM Condition	M47.816	Spondylosis without myelopathy or radiculopathy, lumbar region
ICD-10-CM Condition	I83.813	Varicose veins of bilateral lower extremities with pain
ICD-10-CM Condition	G43.001	Migraine without aura, not intractable, with status migrainosus
ICD-10-CM Condition	M54.6	Pain in thoracic spine
ICD-10-CM Condition	M54.5	Low back pain
ICD-10-CM Condition	M43.16	Spondylolisthesis, lumbar region

## 3. Select View PDF to view a revision. The most recent revision is at the bottom.

The screenshot shows the 'Note Information' and 'PDF Revisions' sections. The 'Note Information' table has columns for Date of Service, Locked By, Locked At, Supervisor Locked By, and Supervisor Locked At. The 'PDF Revisions' table has columns for PDF Generated At, Locked?, and Supervisor Locked?. The most recent revision is highlighted with a red arrow.

Date of Service	Locked By	Locked At	Supervisor Locked By	Supervisor Locked At	
Jun 10, 2025 10:45 AM	Ali	Jun 11, 2025 3:43 PM	Ali	Jun 11, 2025 3:43 PM	<a href="#">View Note</a>

  

PDF Generated At	Locked? ⓘ	Supervisor Locked? ⓘ	
Jun 11, 2025 3:41 PM	No	No	<a href="#">View PDF</a>
Jun 11, 2025 3:43 PM	No	No	<a href="#">View PDF</a>
Jun 11, 2025 3:43 PM	Yes ✓	Yes ✓	<a href="#">View PDF</a>

Close

