From the Office of Clinical Informatics
Quick Reference Guide (QRG)
NetSmart – Copy a Note to Attach to a Visit
May 9, 2023

This Quick Reference Guide (QRG) reviews the steps to copy a note and attach to a visit.

Common Buttons & Icons

⊕	**Add** icon
All	**All** button
Copy Note	**Copy Note** button
🗑	**Delete** icon

Copy a Note to Attach to a Visit

➢ From the Open Charts screen:

STEP 1: Tap **Clinical Note.**

STEP 2: Tap the **All** button in the lower left corner of the screen.
- A list of all notes for the patient chart displays.

STEP 3: Tap the note you want to copy.

STEP 4: Tap the **Copy Note** button in the lower right corner of the screen.
- A **Do you want to copy Clinical Note?** pop-up message displays; tap **OK.**

NOTE: Once you have copied the note you can delete it.

STEP 5: Tap the **Delete** icon in the lower right corner of the screen.
- An **Are you sure you want to delete?** pop-up message displays; tap **Delete.**

STEP 6: Tap the **Add** icon.

STEP 7: Double-tap the **Note** field.

STEP 8: Tap **Paste** from the options pop-up that displays.
- The copied note displays in the **Note** field.

Complete the Clinical Note Elements

STEP 1: Tap the **Use Code** drop-down arrow.

STEP 2: Select the appropriate use code for the note.

NOTE: The documentation fields and check boxes that appear in the bottom half of the Clinical Note screen are determined by the Use Code selected.

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STEP 3: Tap anywhere outside the list to collapse the Use Code list.

STEP 4: Tap the back arrow next to Clinical Note to save the note.

- The Open Charts screen displays the Clinical Note indicator showing 100% completion.