

How to Load Notes From Previous Visits

Jay-Ileen (Ai) - 2025-03-20 - [VSee Clinic for Providers](#)

This feature allows you to retrieve and repurpose notes from past visits.

1. Go to the **Notes** tab.
2. Click on **Load Notes**.
3. Select **Previous Visits**.

The screenshot displays the VSee Clinic web interface. At the top, the navigation bar includes 'VSee Clinic', 'Dashboard', 'Patients', 'Schedule', and 'Health'. A user profile for 'Charlotte Jones' is visible in the top right. Below the navigation bar, a patient card for 'Alena Workman' is shown, including her status, age, gender, address, and contact information. To the right of the patient card, visit details are listed: Visit ID 123456, Today 11:11 AM, Video Visit, 30-min Consultation, 00:29:37, USD 49.00, and Charlotte's Room. Below the patient card, a horizontal menu contains 'Intake', 'Notes', 'Visits', 'Problem List', 'Medical History', 'Allergies', 'Medications', and 'Documents'. The 'Notes' tab is selected and highlighted with a red box and a red circle with the number 1. Below the 'Notes' tab, a dropdown menu is open, showing options: 'Load Notes' (highlighted with a red box and a red circle with the number 2), 'Templates', 'Previous visits' (highlighted with a red box and a red circle with the number 3), and 'AI assist'. The main content area is divided into two sections: 'Subjective' and 'Facesheet'. The 'Subjective' section includes fields for 'Chief Complaint', 'History of Present Illness', 'Past Medical History', 'Past Surgeries', 'Social History', 'Health Habits', 'Family History', and 'Medications'. The 'Facesheet' section includes 'ALLERGIES' (listing 'Procaine penicillin'), 'MEDICATIONS' (listing 'ibuprofen 800 mg oral tablet' and 'Prednisone 60 milligram(s) oral tablet'), and 'DIAGNOSES' (listing 'Fever, unspecified [R50.9]' and 'Typhoid fever, unspecified [A01.00]').

Open pv1.JPG



1. Select which previous visit you would like to load the SOAP Notes.

*Note: You can sort by **Newest** to **Oldest** visits or vice versa.*

History

Sort by:

Newest

4

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

09/23/2023 19:25

#1008230482

CC: Patient presented with persistent headache. A chronic primary
DX: Headache, sore throat

Open pv02.JPG



1. After you selected a visit, click on the checkbox of the information you want to include.

Note: You can also click the checkbox for All to select all the information at once.



You will be routed back to the SOAP Notes field to see the changes made.
Then you can Sign and Send the notes to complete and save changes.

Open pv04.png



[Intake](#) [Notes](#) [Payment](#) [Visits](#) [Problem list](#) [Medical History](#) [Allergies](#) [Medications](#) [Documents](#) [Memo](#)

Notes

Last update time: 12/16/2024 10:17 AM Modifier: Erika Provider

Subjective

AI Assist

Chief Complaint [Edit](#)

History of Present Illness

Past Medical History [Edit](#)

- Other
- Thyroid problems
- Depression/anxiety
- Diabetes

Last updated at 06/10/2024 08:22 PM by provider+vseeio hana

Past Surgeries [Edit](#)

- 3434re èrere on 01-01-2023
- sfsdf on 01-04-2024

Last updated at 06/10/2024 08:23 PM by provider+vseeio hana

Past Hospitalization [Edit](#)

- sdsd on 01-01-2024

Note: Please reach out to your Account Manager if you'd like to enable

this feature in your Clinic.

Need more assistance? Send us an email at help@vsee.com or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

- Tags
- [load notes](#)
- [previous notes](#)
- [reuse notes](#)