

Knowledgebase > VSee Clinic for Providers > How to Load Notes From Previous Visits

How to Load Notes From Previous Visits

Jay-Ileen (Ai) - 2025-03-19 - 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.

| 🐌 Add tag | |
|--|---|
| Status: Pending Completion Pending Notes | • |
| < All participants | |
| Alena Workman Office Age 31, Jan 1, 1991, Female 18 Cleveland Street, Somerville, MA, 02143 patient1@email.com, +14784619502 | # Visit ID 123456 Today 11:11 AM W Video Visit 0 30-min Consultation 2 00:29:37 |
| 🗭 🌲 🗄 | USD 49.00 Charlotte's Room |
| Intake Notes Visits Problem List Medical History Notes Subjective | Allergies Medications Documents |
| Intake Notes Visits Problem List Medical History Notes Subjective Chief Complaint (27 Edit) | Allergies Medications Documents |
| Intake Notes Visits Problem List Medical History Notes Subjective Chief Complaint (2 Edit) History of Present Illness | Allergies Medications Documents |
| Intake Notes Visits Problem List Medical History Notes Subjective Chief Complaint @ Edit History of Present Illness | Allergies Medications Documents |
| Intake Notes Visits Problem List Medical History Notes Subjective Chief Complaint (@ Ease History of Present Illness Past Medical History (@ Ease Past Surgeries (@ Ease) | Allergies Medications Documents |
| Intako Notes Visits Problem List Medical History Notes Subjective Chief Complaint (# Edit) History of Present Illness Past Medical History (# Edit) Past Surgeries (# Edit) Social History (# Edit) | Allergies Medications Decuments Templates Tercious value Al assist Decime penkellin Decime penkellin |

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.



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.



 Click Merge or Replace the existing SOAP Notes you have for that patient's current visit.

Open pv03.JPG

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

×



×

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 <u>help@vsee.com</u> or check out the <u>Help</u> section under the Profile Menu of your VSee Clinic.

Tags load notes previous notes reuse notes