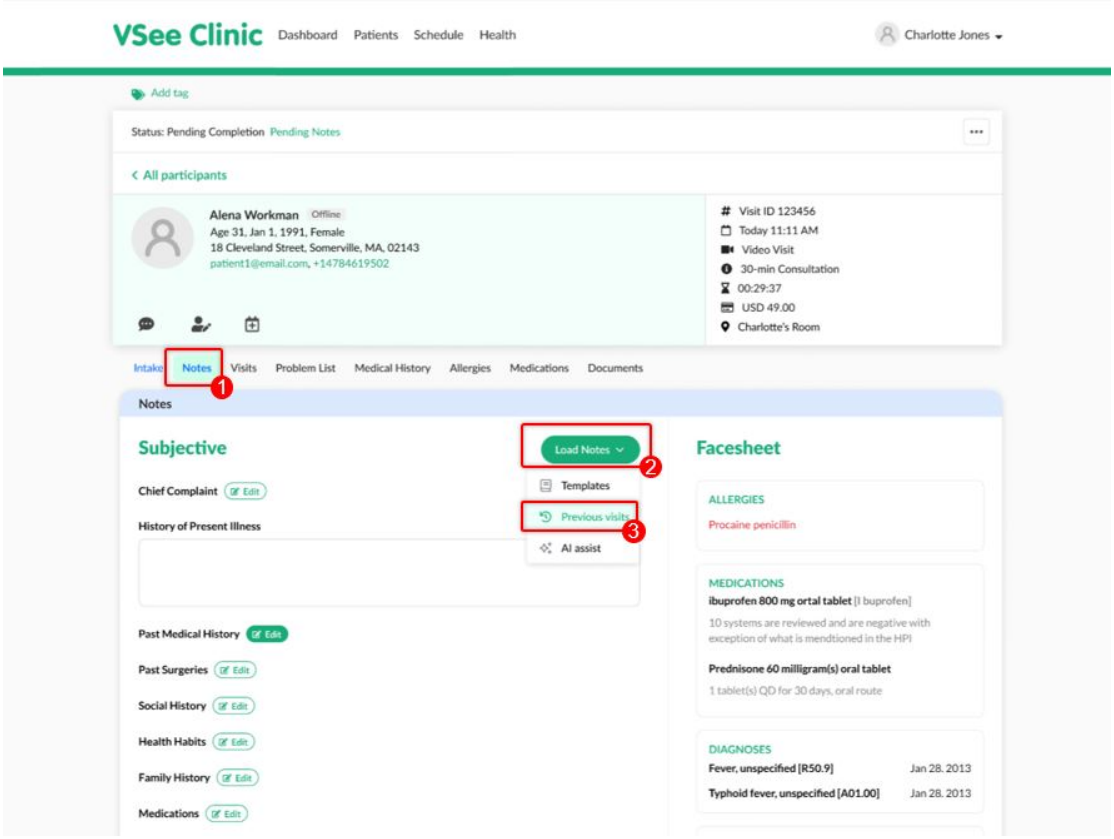
How to Load Notes From Previous Visits

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

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

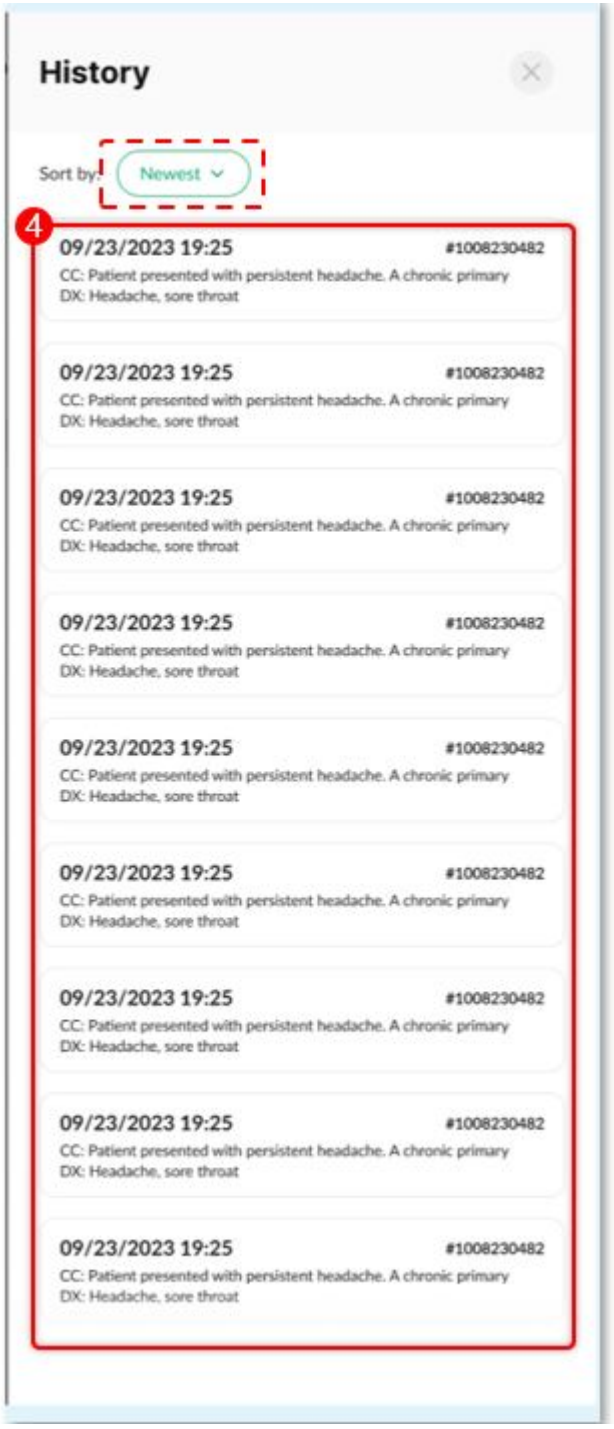
1. Go to the **Notes** tab.
2. Click on **Load Notes**.
3. Select **Previous Visits**.



Open pv1.JPG

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

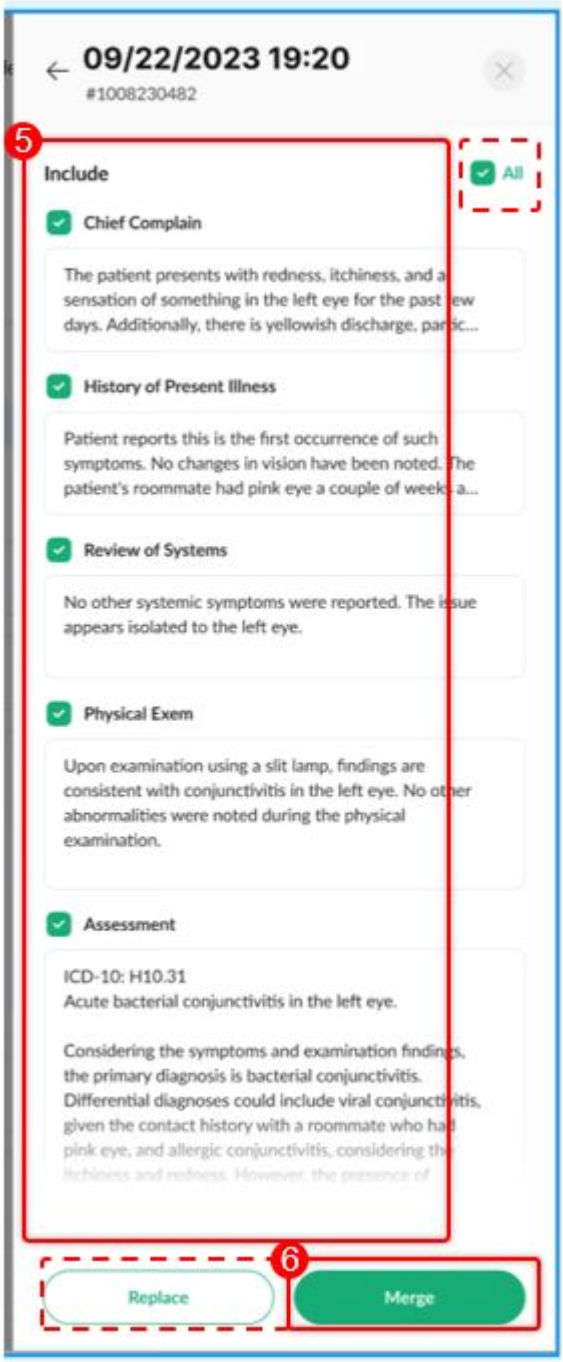
*Note: You can sort by **Newest** to **Oldest** visits or vice versa.*



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.



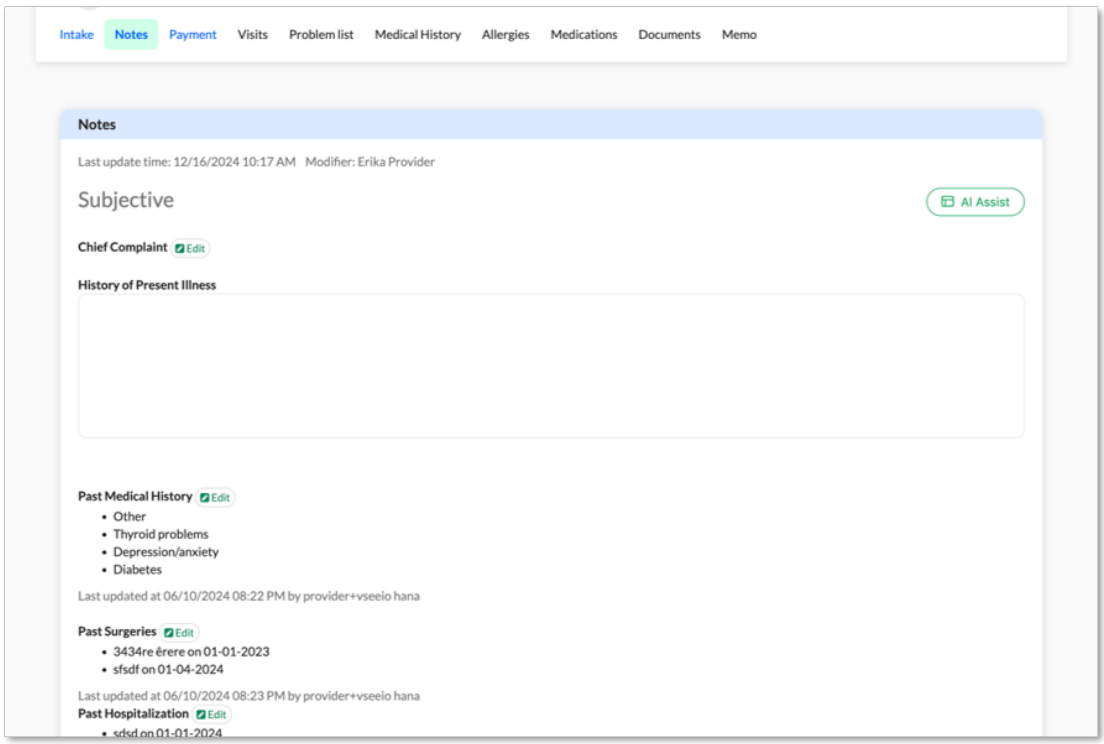
1. Click **Merge** or **Replace** the existing SOAP Notes you have for that patient's current visit.

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

- Tags
- load notes
- previous notes
- reuse notes