

Customizing your document types

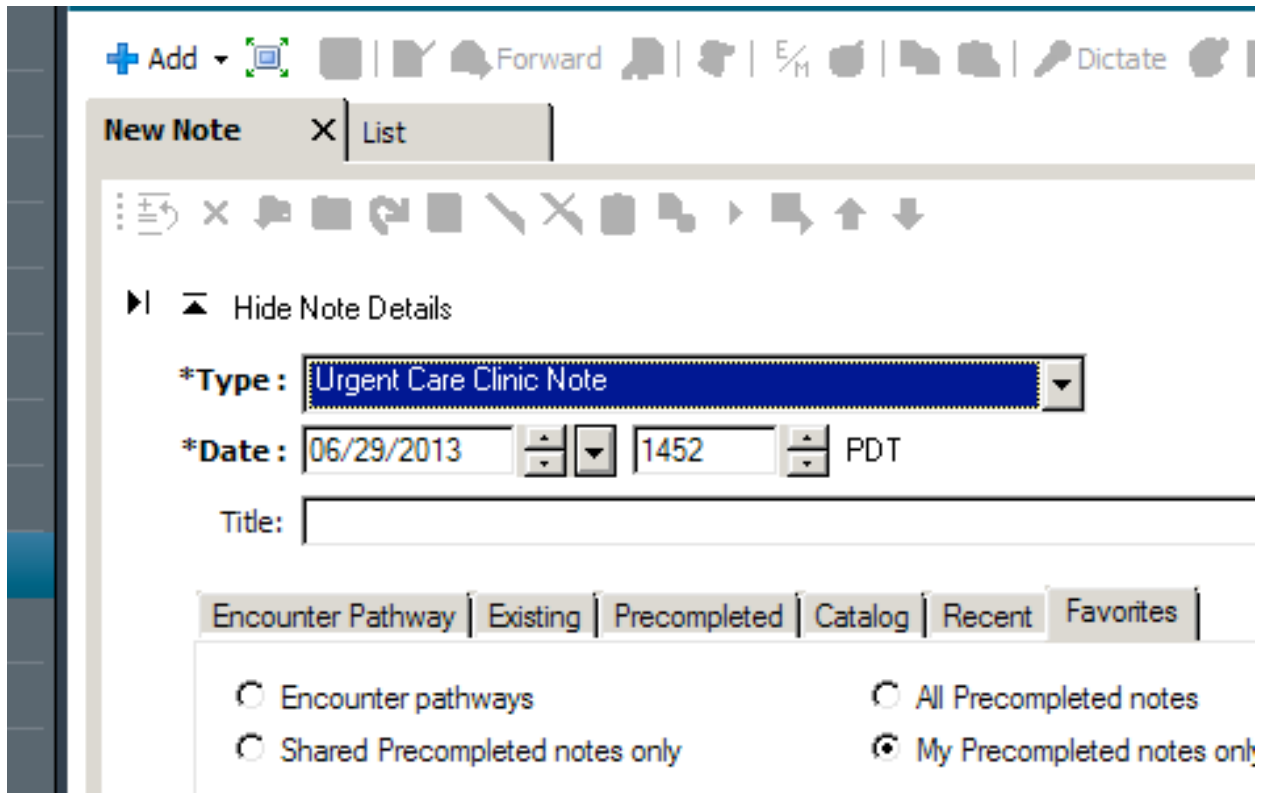
In order to limit the number of “document types” to choose from when creating a new note follow below. You can also set the default note type if you like.

In order to access this menu you must start a new Powernote.

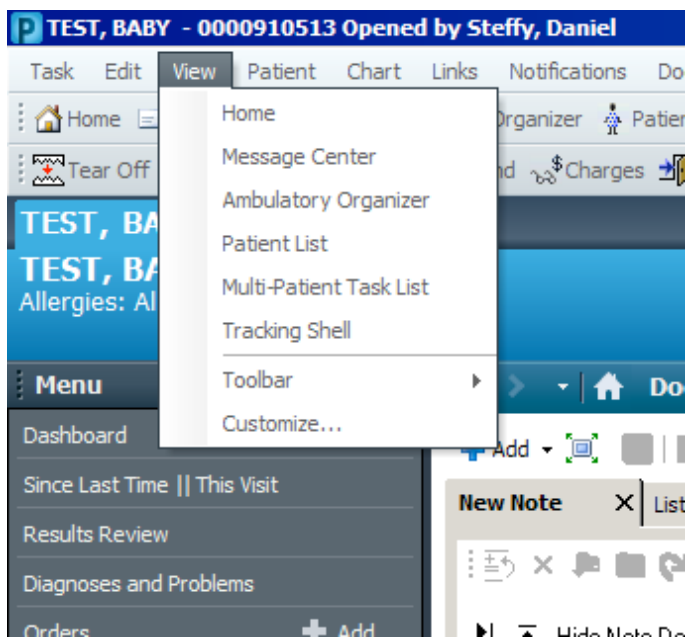
The screenshot displays a medical software interface. At the top, there is a menu bar with options: Task, Edit, View, Patient, Chart, Links, Notifications, Documentation, and Help. Below this is a secondary navigation bar with icons and labels for Home, Message Center, Ambulatory Organizer, Patient List, Multi-Patient Task List, and Track. A third bar contains icons for Tear Off, Attach, Change, Suspend, Charges, Exit, Calculator, AdHoc, and C. The main header area shows the patient name "TEST, BABY" in a blue box, with a close button (x) to its right. Below the name, it says "TEST, BABY" and "Allergies: Allergies Not Recorded". On the right side of the header, it displays "DOB:5/25/20" and "Code Status". A left-hand "Menu" sidebar is visible, listing various options: Dashboard, Since Last Time || This Visit, Results Review, Diagnoses and Problems, Orders (+ Add), Medication List (+ Add), Health Maintenance, Notes, Documentation (+ Add) - which is currently selected and highlighted in blue, Form Browser, Task List, and Allergies (+ Add). The main content area is titled "Documentation" and features a toolbar with buttons for Add (with a dropdown arrow), Submit, Forward, and Modify. Below the toolbar, there is a "List" section with a button labeled "Add New Document". A "Display:" dropdown menu is set to "All". At the bottom of the list area, there are sorting options: "Arranged By: Date" and "Newest At Top" (with a dropdown arrow).

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Highlight a note type



Go to the top menu, under “View” select “Customize”



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You will now have access to the new menu. Here you can choose your default note type, and make a list of limited note types you will need access to. Be sure to add hospital and clinic notes types that you will use to this limited list.

