

Customizing your document types

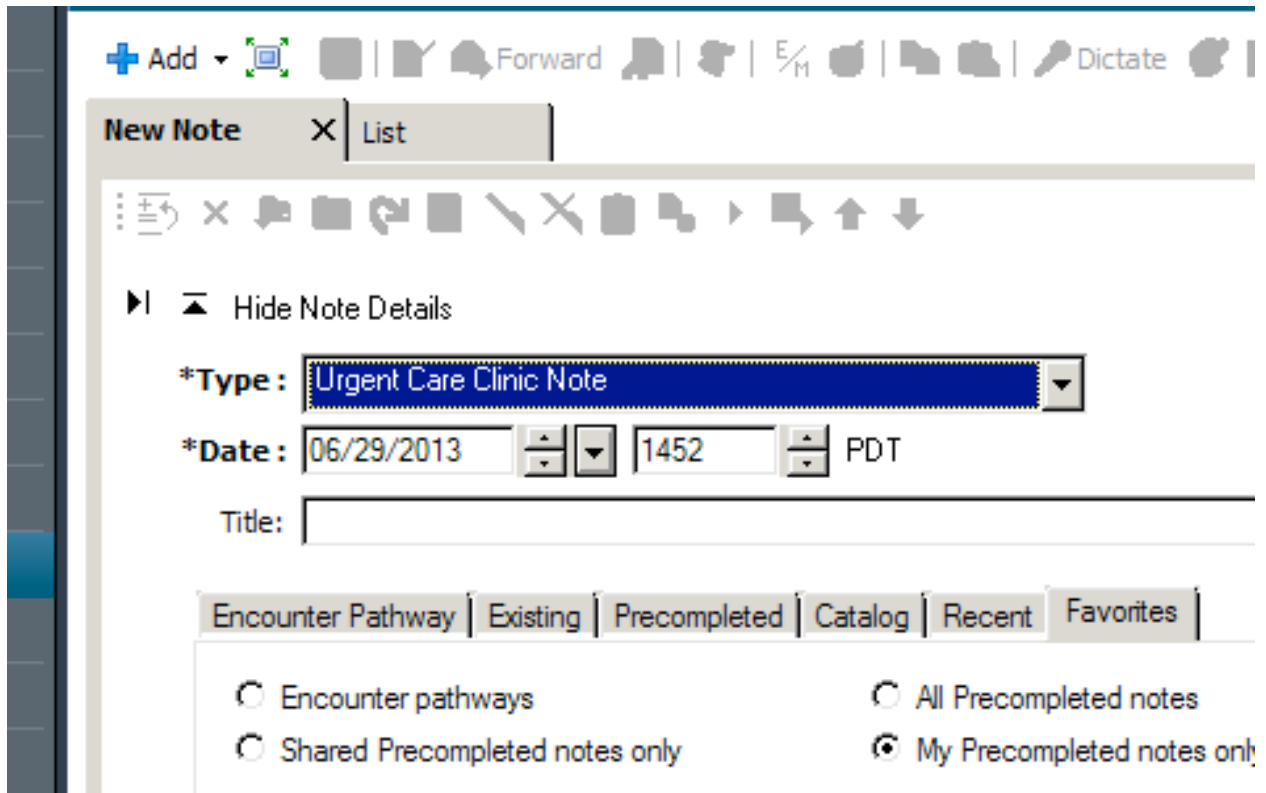
In order to limit the number of “document types” to choose from when creating a new note follow below. You can also set the default note type if you like.

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

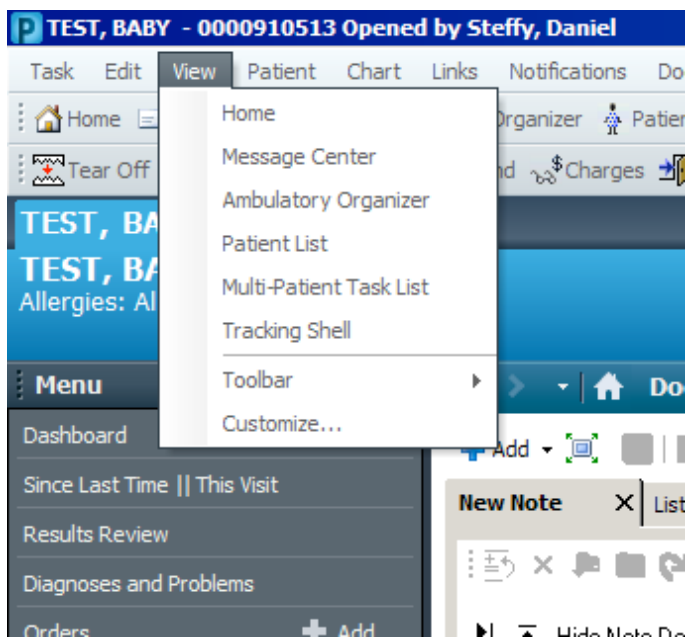
The screenshot displays a medical software interface. At the top, there is a menu bar with options: Task, Edit, View, Patient, Chart, Links, Notifications, Documentation, and Help. Below this is a secondary menu with icons and labels: Home, Message Center, Ambulatory Organizer, Patient List, Multi-Patient Task List, and Track. A third row of icons includes Tear Off, Attach, Change, Suspend, Charges, Exit, Calculator, AdHoc, and a clipboard icon. The main header area shows the patient name 'TEST, BABY' in a blue box, followed by 'TEST, BABY' and 'Allergies: Allergies Not Recorded' on the left, and 'DOB:5/25/20' and 'Code Status' on the right. A 'Menu' sidebar on the left lists various options: Dashboard, Since Last Time || This Visit, Results Review, Diagnoses and Problems, Orders (+ Add), Medication List (+ Add), Health Maintenance, Notes, Documentation (+ Add), Form Browser, Task List, and Allergies (+ Add). The 'Documentation' section is active, showing a toolbar with '+ Add', 'Submit', 'Forward', and 'Modify'. Below the toolbar is a 'List' section with a search box containing 'Add New Document'. A 'Display:' dropdown menu is set to 'All'. At the bottom, there is a sorting section with 'Arranged By: Date' and 'Newest At Top'.

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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.

