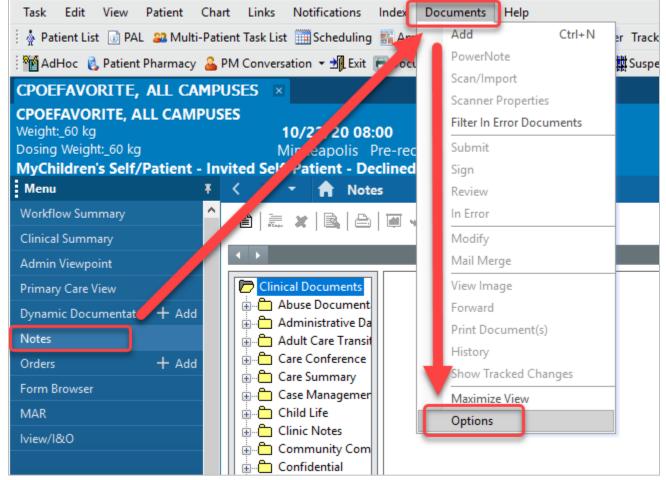


Manage Personal Document Type List

Manage Personal Document Type List

To add or update your personal document type list, follow these instructions.

- 1. Open a patient's chart.
- 2. From the **Notes** page in the Table of Contents, click **Documents** on the top menu, then select **Options** from the dropdown list.



- 3. To create your personal list:
 - Locate the Document Type.
 - Use the scroll bar to locate your desired Document Type in the alphabetical list.
 - **Note:** You can click in the **All Available Document Types** section and begin typing the name of the Document Type to locate it quickly.
 - Add the Document Type to your personal list.
 - Select the Document Type and click the right-arrow button to move the Document Type to the **Personal Document Type List**.
 - Remove documents no longer needed from your personal list.

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Manage Personal Document Type List

• Use the left-arrow button **Document Types** list.

to move that Document Type back to the All Available

Notes

- Only use the middle right or left arrows to move Document Types into or remove from your **Personal Document Type List**.
- Select your most frequently used note as your **Default Document Type**. This Document Type will be selected automatically when you start a new note. Click the drop-down to select your preferred **Default Document Type**.
- 4. Click **OK** when finished building your list.

P Clinical Note Options	×
Document Types Index Defaults User Options	1
Default Document Type: Well Child Check ~	
All Available Document Types Personal Document Type List	
OK Can	cel

5. Close the patient chart.

When you open a new chart, the default Document Types will be updated in your **Personal Document Type List.**