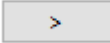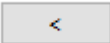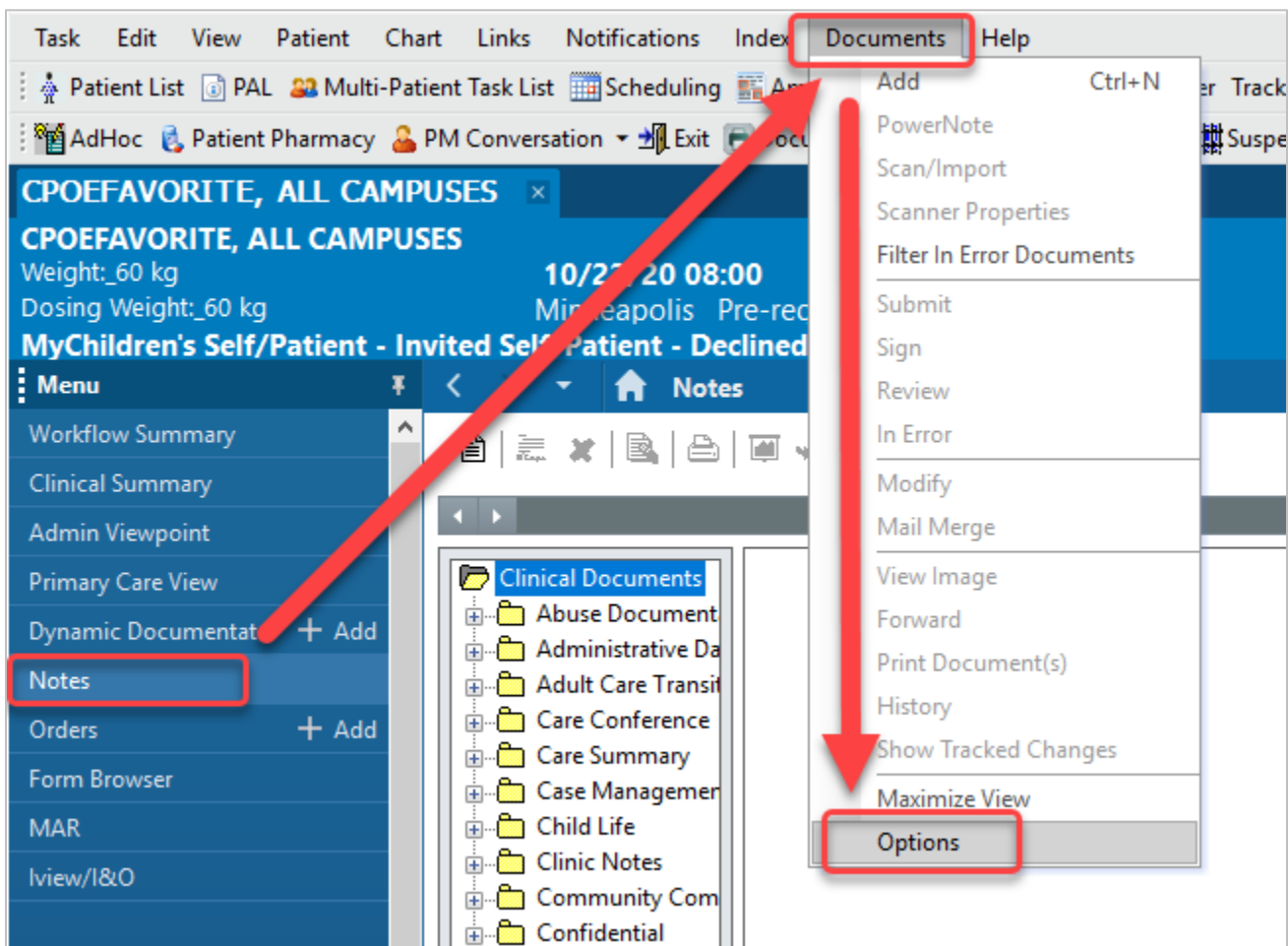# Manage Personal Document Type List

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.

o Use the left-arrow button [<] to move that Document Type back to the **All Available Document Types** list.

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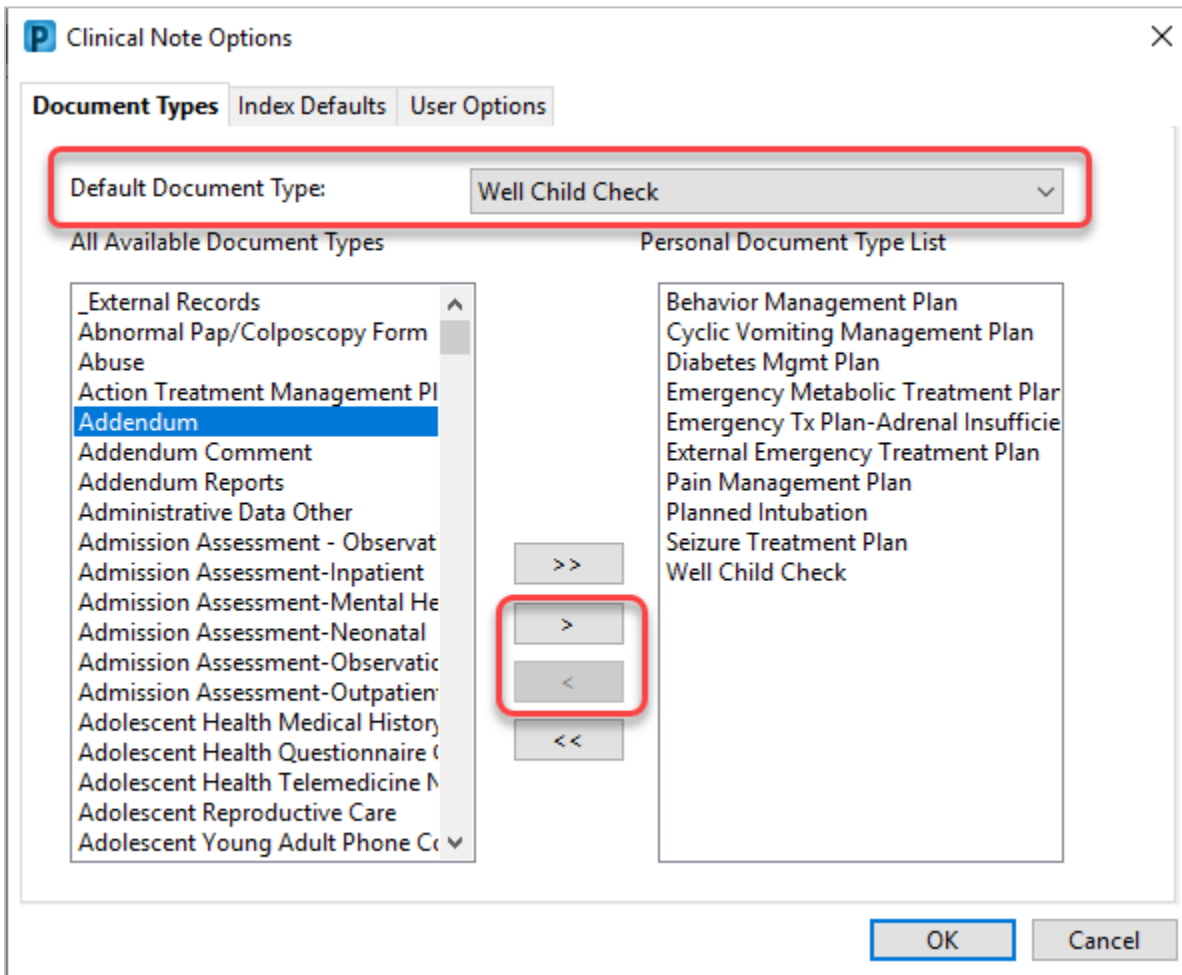
5. Close the patient chart.
When you open a new chart, the default Document Types will be updated in your **Personal Document Type List.**