Custom Macro Notes option

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Overview

Macro Notes allow you to enter a ‘daily note’ explaining what you did that visit with a patient without having to open the Patient Note Page and enter the note manually.

You have an unlimited number of Macro Notes available.

Set up Macro Notes

Click **Program Setup** on the top menu bar and select **Custom Macro Notes Options**

For each note, enter a name that will be helpful to describe the type of note, the note you want entered in the patient’s record, and the description of the next visit for the patient (the next visit description is optional).

For example, we have a note named "Start RCT". The note says "Access, inst., F&S C&C," and the next visit says "File, shape and pack."

The use of Macro Notes will significantly reduce the time to complete a patient’s record.

To move between notes, use the ‘Next’ and ‘Previous’ buttons. Macro Notes can be used from many different forms within the patient’s record. The most popular options are the Notes to Front form and the ‘Menu’ button on the header of the patient’s chart.

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