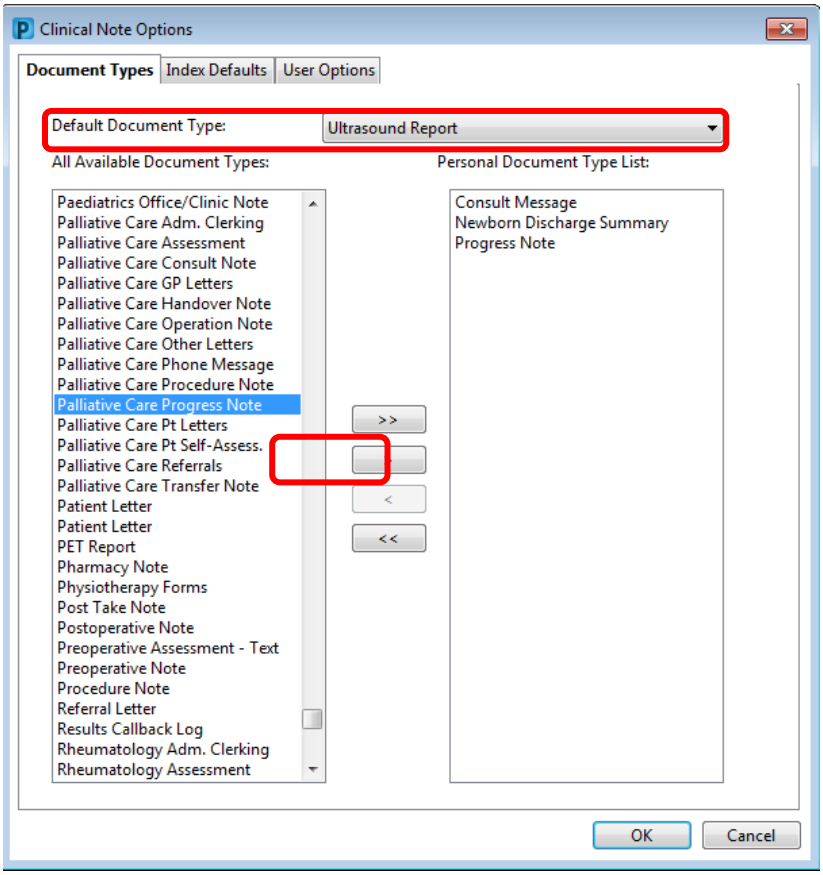
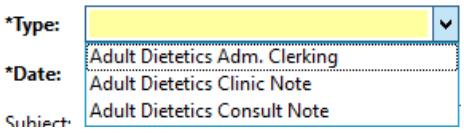
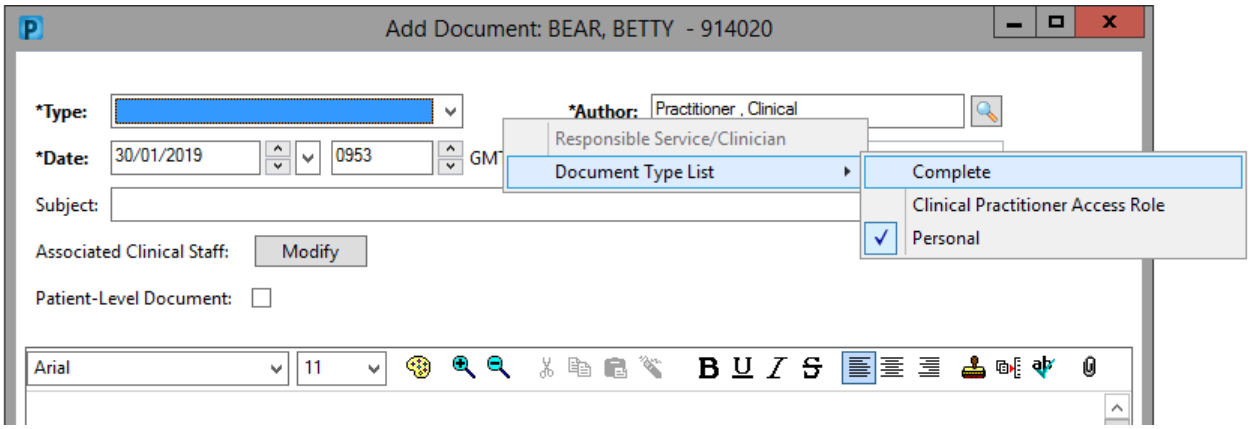
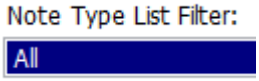
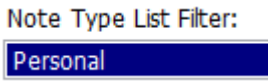
CREATING A PERSONAL DOCUMENT TYPE LIST

1.	Open patient record.
2.	Click on Clinical Notes from the left hand menu.
3.	Click on 'Documents' from the top menu bar Documents and select options from the drop down menu
4.	Window opens and defaults to document Types A) You can choose a Default Document Type. This will automatically pop up as the 'Type' when you next open a Clinical Note. B) Select from Available Document Types by individually clicking on the document name and then clicking on the single arrow in the middle to move into the Personal Document type List. When you next go into Clinical Notes only this selection will display. 
5.	When your selection is completed click on OK.
6.	Click on 'Clinical Notes' and add a new note – when you now select from the 'TYPE' drop down only those that you have been added to your Personal Document Type are viewable and the default document will also be set. 

7.	If a note type is not available in your personal list you can right click next to the 'TYPE' drop down and then select Document Type List and Complete. This will give you the original full list of note types to choose from. 
8.	Alternatively, click on 'Documentation' & add new.
9.	Note Type List Filter:  All will allow you to choose from the whole available type list.
10.	Note Type List Filter:  Personal will allow you to choose from your selected note types.