How do I create new Notes Macros that are used in patient Progress Notes?

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1 year ago · Updated

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Notes Macros are used in Progress Notes, Flash Alerts, and Remarks within the Claim Fill-Out Information.

To enter macros:

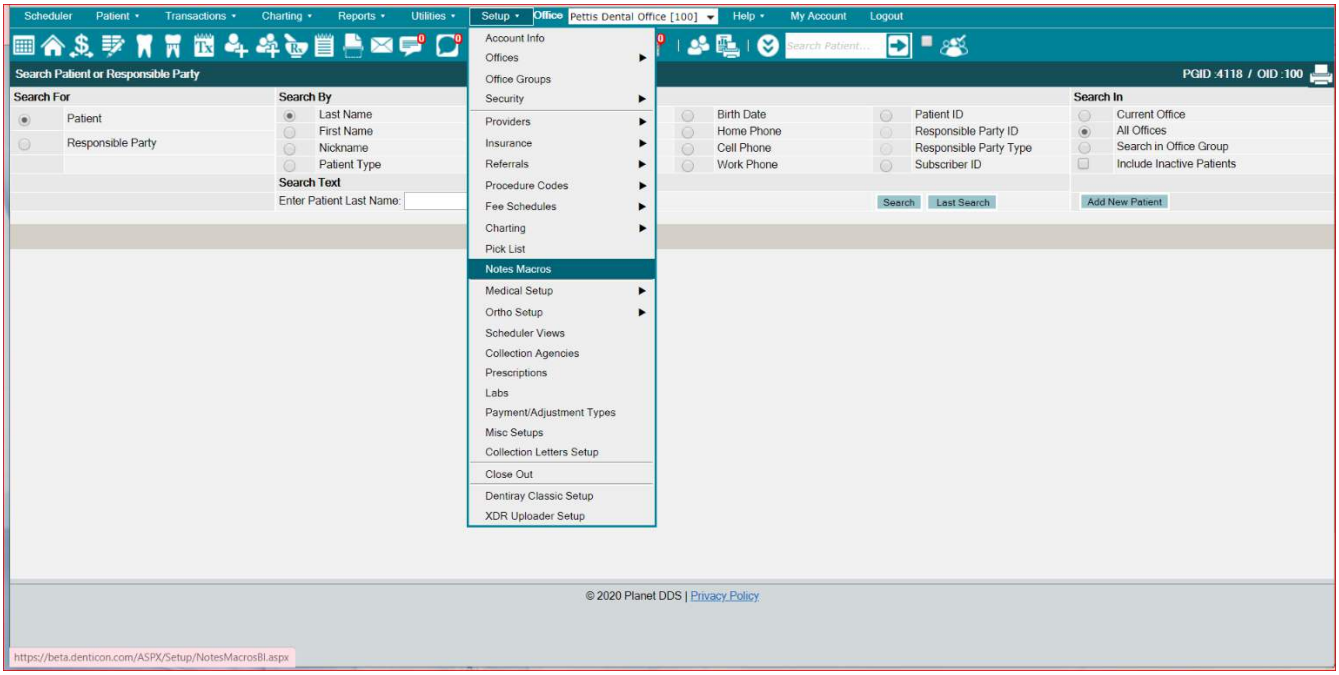
- setup
- notes macros
- in the "1. Select Macro Category" field, select the desired category *
- click "Add Macro" button
- input a Name in the "Macro Name" field (this is the name that appears in the selection list in "2. Select Macro")
- input the text in the "Macro Value" field
- if the user should be prompted to input a patient-specific notation within the notes macro:
    - click the “Add Question” button
    - input a short question prompt
    - click Save

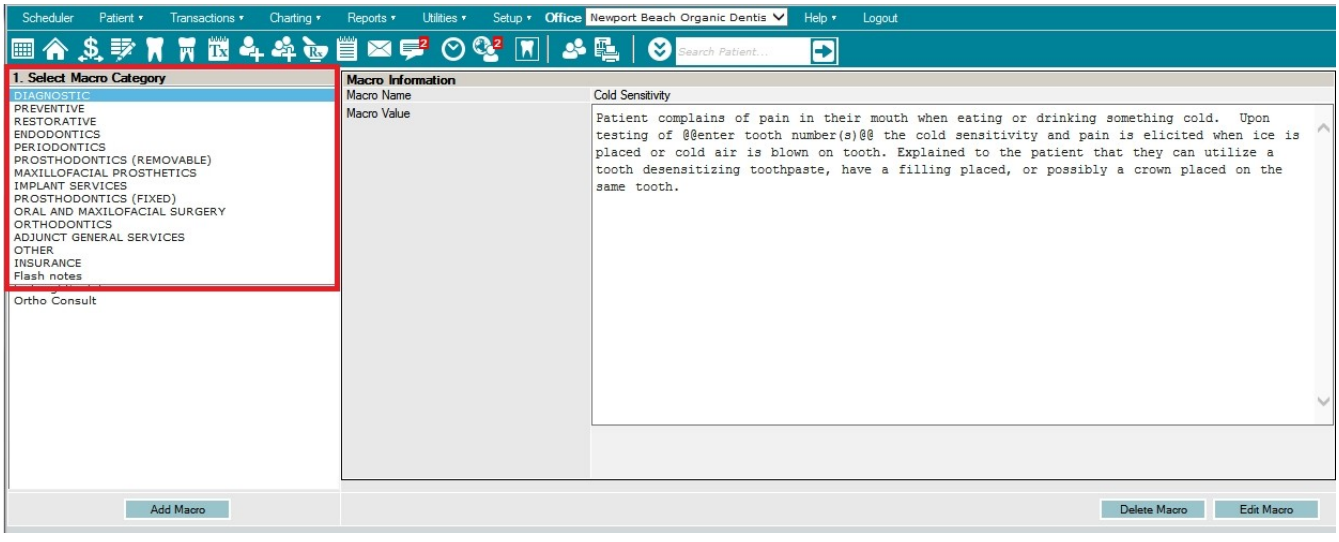
- click Save

* If the desired category isn't in the listing:

- setup
- misc setups
- advanced tab
- notes macros
- edit
- input Description, click "Add New Macro"
- Save

The Notes Macros are specific and unique to each office location.





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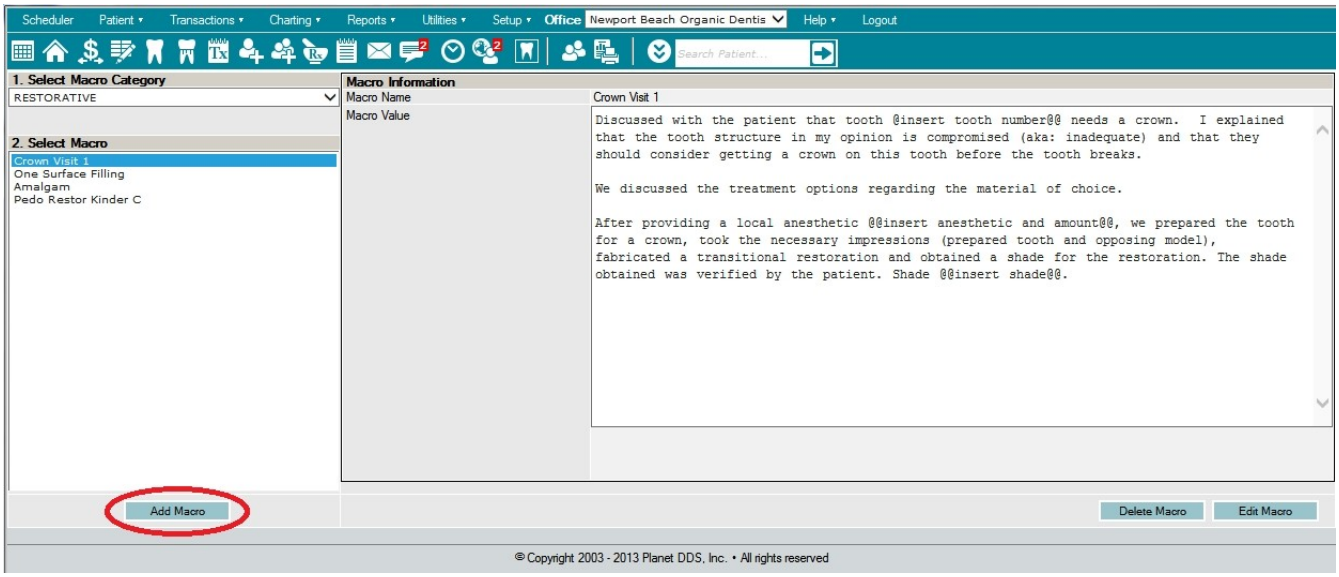

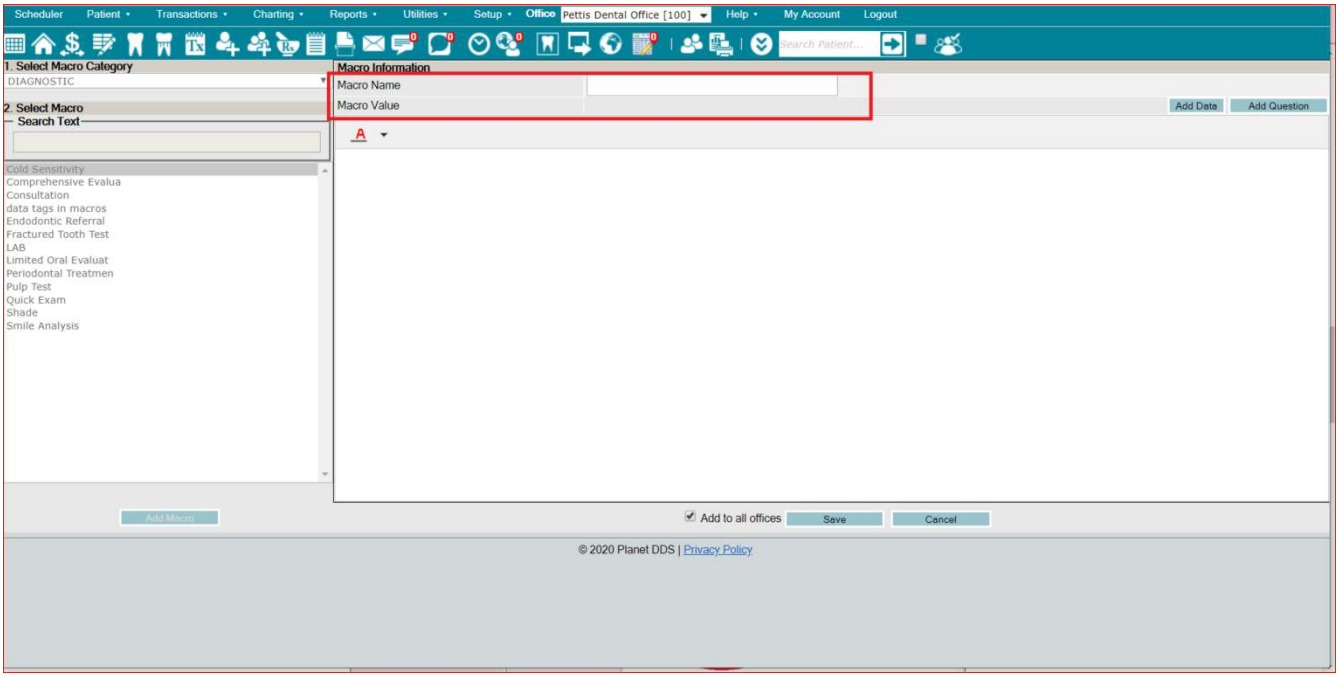

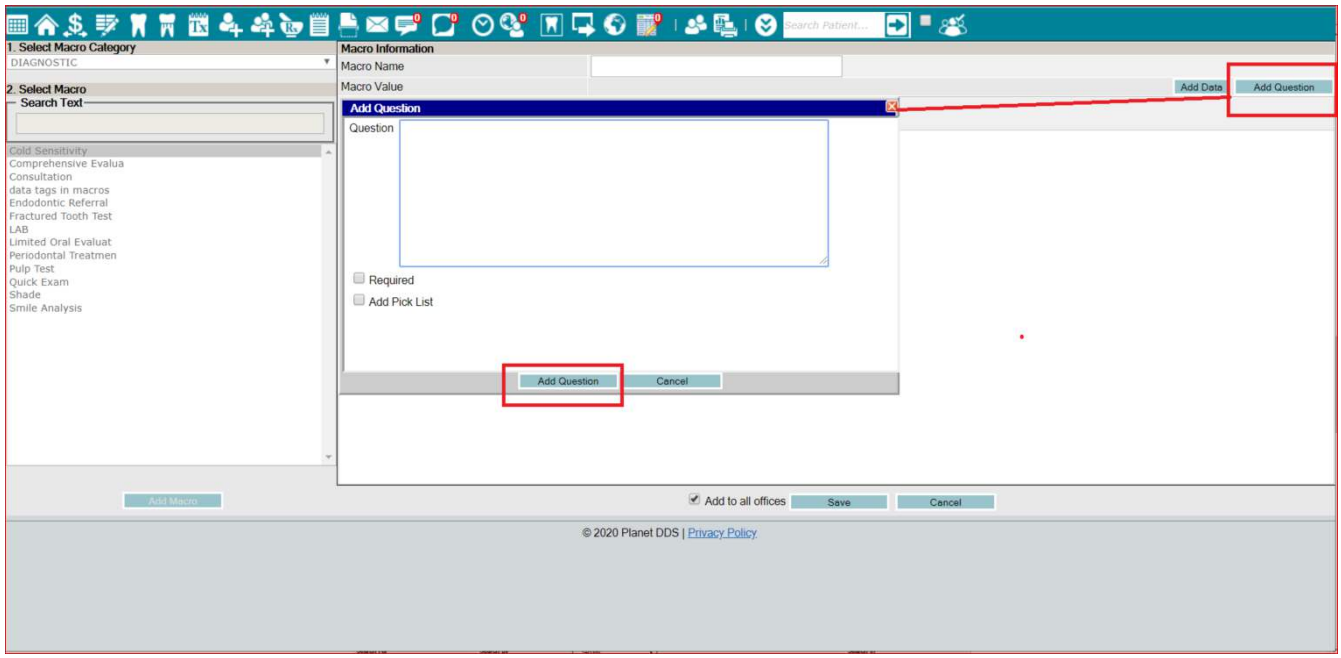
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DIAGNOSTIC
2. Select Macro
Search Text
Cold Sensitivity
Comprehensive Evalua
Consultation
data tags in macros
Endodontic Referral
Fractured Tooth Test
LAB
Limited Oral Evaluat
Periodontal Treatmen
Pulp Test
Quick Exam
Shade
Smile Analysis
Macro Information
Macro Name
Macro Value
Add Data
Add Question
Add Question
Question
Required
Add Pick List
Add Question
Cancel
Add Macro
Add to all offices
Save
Cancel
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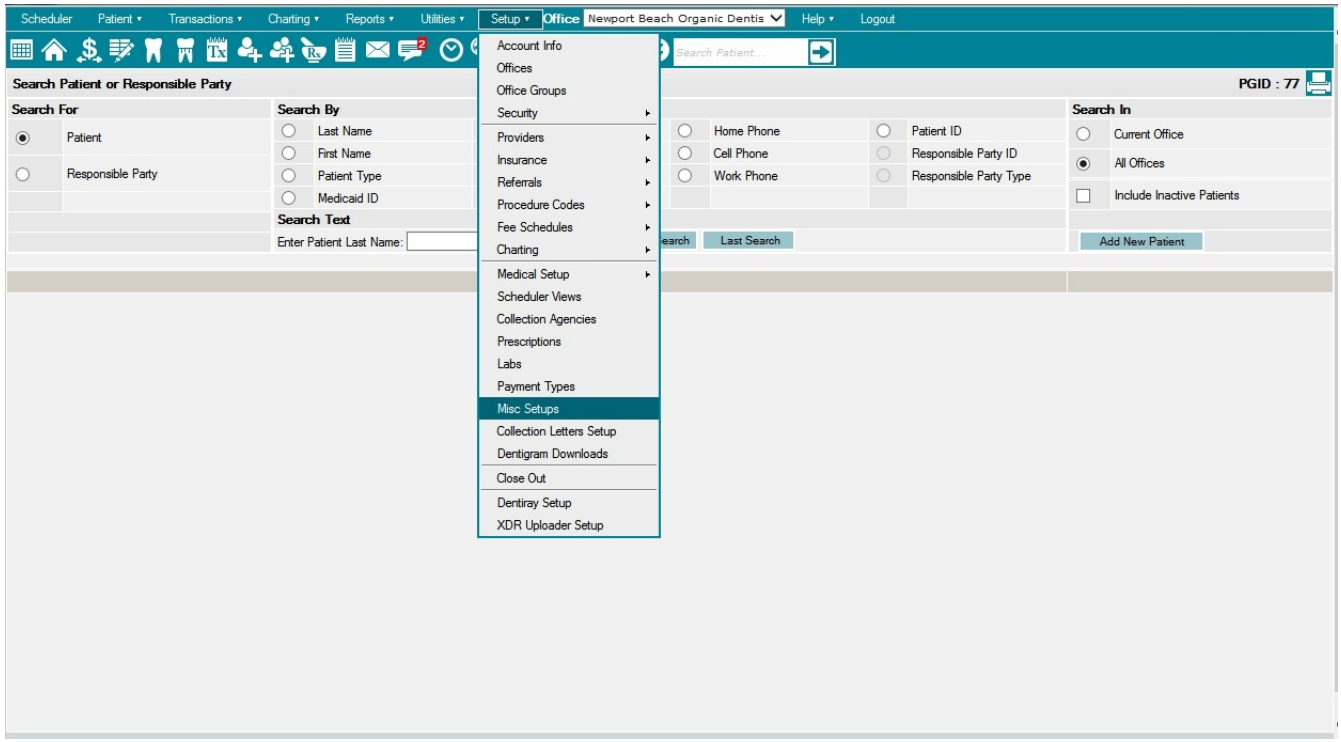
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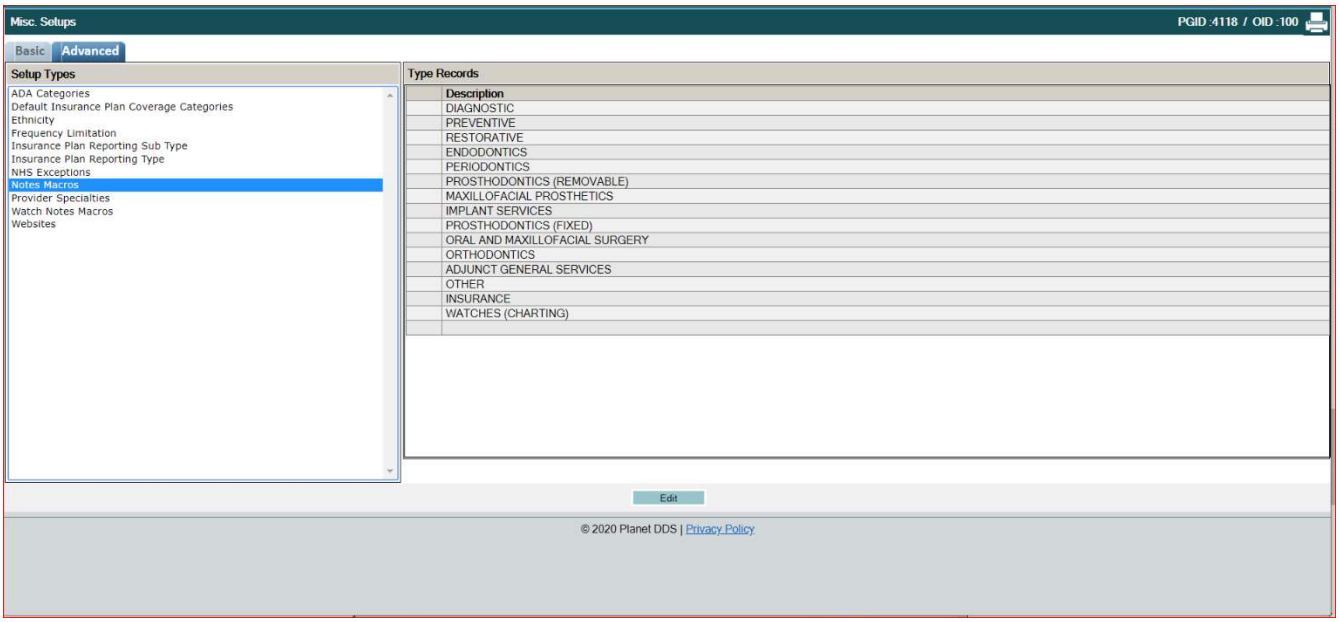

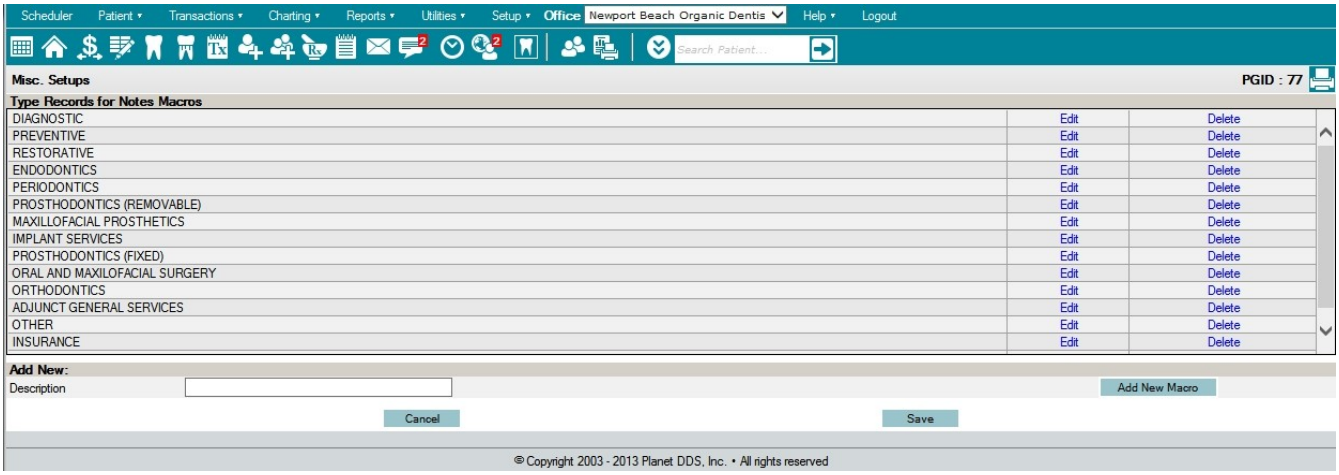

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