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



Nichole Pettis

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:

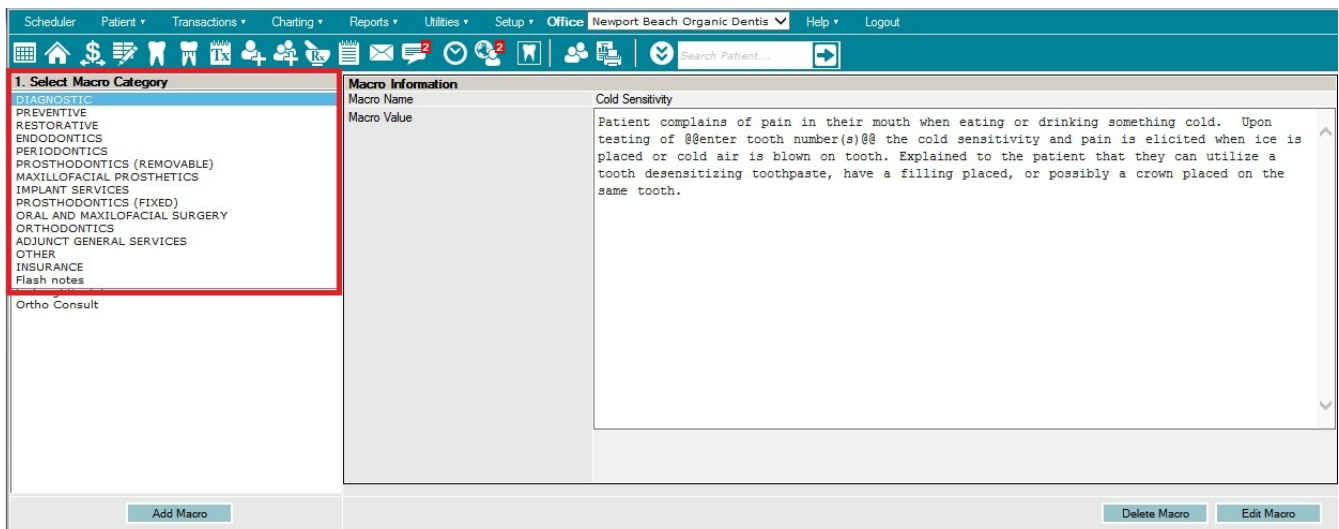
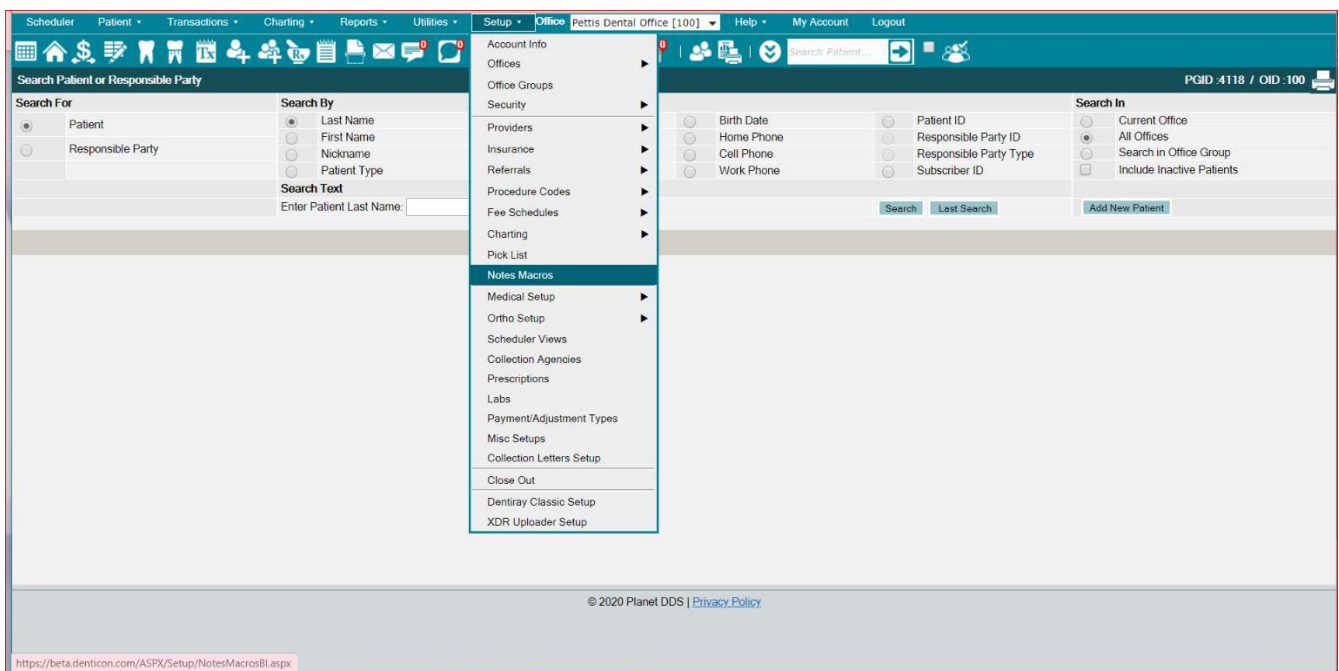
- setup
- notes macros
- in the "1. Select Macro Category" field, select the desired category *
- click "Add Macro" button
- input a Name in the "Macro Name" field (this is the name that appears in the selection list in "2. Select Macro")
- input the text in the "Macro Value" field
- if the user should 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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1. Select Macro Category
RESTORATIVE

2. Select Macro
Crown Visit 1
One Surface Filling
Amalgam
Pedo Restor Kinder C

Macro Information
Macro Name: Crown Visit 1
Macro Value: Discussed with the patient that tooth @insert tooth number@@ needs a crown. I explained that the tooth structure in my opinion is compromised (aka: inadequate) and that they should consider getting a crown on this tooth before the tooth breaks.

We discussed the treatment options regarding the material of choice.

After providing a local anesthetic @@insert anesthetic and amount@@, we prepared the tooth for a crown, took the necessary impressions (prepared tooth and opposing model), fabricated a transitional restoration and obtained a shade for the restoration. The shade obtained was verified by the patient. Shade @@insert shade@@.

Add Macro Delete Macro Edit Macro

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1. Select Macro Category
DIAGNOSTIC

2. Select Macro
Search Text

Gold Sensitivity
Comprehensive Evalua
Consultation
data tags in macros
Endodontic Referral
Fractured Tooth Test
LAB
Limited Oral Evaluat
Periodontal Treatment
Pulp Test
Quick Exam
Shade
Smile Analysis

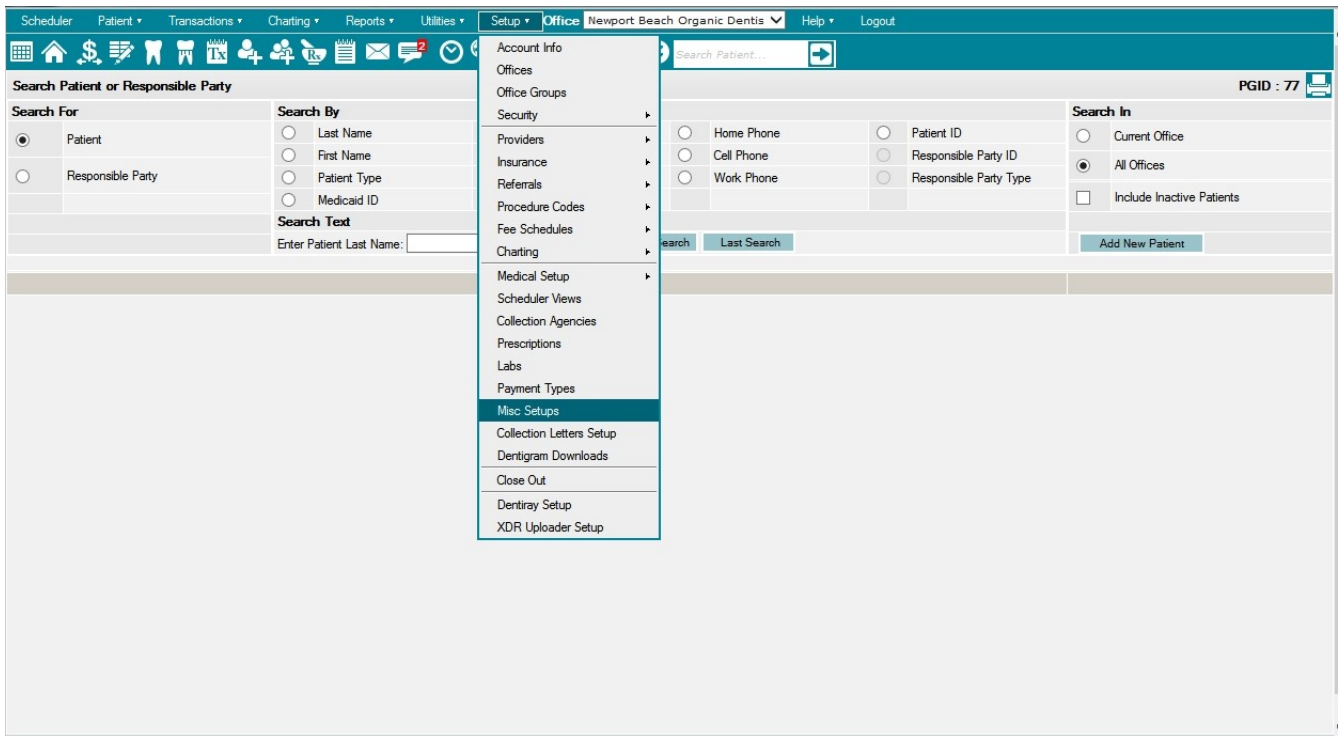
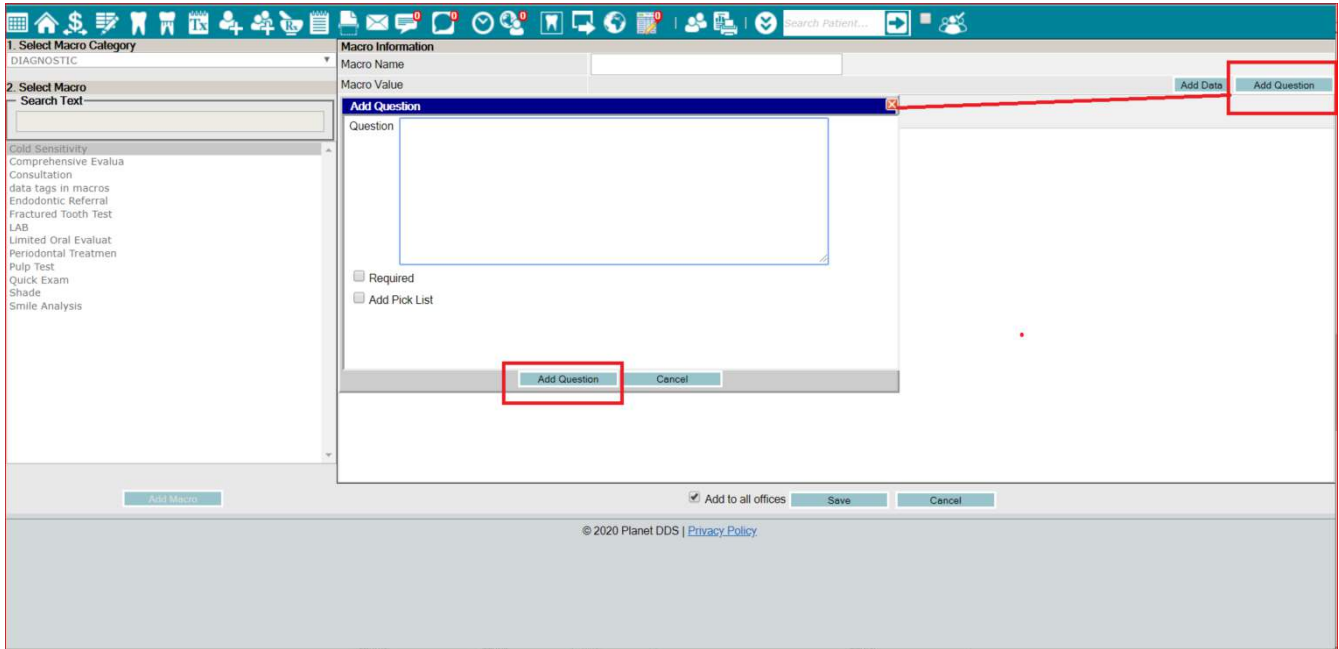
Macro Information
Macro Name:
Macro Value:

Add Data Add Question

Add Macro

Add to all offices Save Cancel

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Misc. Setups PGID: 4118 / OID: 100

Basic **Advanced**

Setup Types

- ADA Categories
- Default Insurance Plan Coverage Categories
- Ethnicity
- Frequency Limitation
- Insurance Plan Reporting Sub Type
- Insurance Plan Reporting Type
- NHS Exceptions
- Notes Macros**
- Provider Specialties
- Watch Notes Macros
- Websites

Type Records

Description
DIAGNOSTIC
PREVENTIVE
RESTORATIVE
ENDODONTICS
PERIODONTICS
PROSTHODONTICS (REMOVABLE)
MAXILLOFACIAL PROSTHETICS
IMPLANT SERVICES
PROSTHODONTICS (FIXED)
ORAL AND MAXILLOFACIAL SURGERY
ORTHODONTICS
ADJUNCT GENERAL SERVICES
OTHER
INSURANCE
WATCHES (CHARTING)

Edit

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Misc. Setups PGID : 77

Type Records for Notes Macros

DIAGNOSTIC	Edit	Delete
PREVENTIVE	Edit	Delete
RESTORATIVE	Edit	Delete
ENDODONTICS	Edit	Delete
PERIODONTICS	Edit	Delete
PROSTHODONTICS (REMOVABLE)	Edit	Delete
MAXILLOFACIAL PROSTHETICS	Edit	Delete
IMPLANT SERVICES	Edit	Delete
PROSTHODONTICS (FIXED)	Edit	Delete
ORAL AND MAXILLOFACIAL SURGERY	Edit	Delete
ORTHODONTICS	Edit	Delete
ADJUNCT GENERAL SERVICES	Edit	Delete
OTHER	Edit	Delete
INSURANCE	Edit	Delete

Add New:

Description

Cancel Save Add New Macro

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