

ChartMaker® Clinical Quick Reference Card

Messaging Using a Note

Add Templates to Instant Note List

- Open a Patient Chart.
- Click the **Note** tab.
- Click **New Note**.
- Click the **Edit New Note List**.
- In the All Templates list, locate the **Template** you want to add.
- Highlight the desired template, and then click the **Add** button.
- Repeat the previous two steps until all desired templates are added.
- When finished, click the **OK** button.

Create a New Note

- Open a Patient's Chart.
- Click the **Note** tab.
- Click **New Note**.
- Click the **Template** for the Chart Note.
- In the Chart Header, modify the **Date**, **Exam Name**, and **Case** as needed.
- Click the **Save** and/or **Close** button.

Transfer Chart Note to Another User

- Open a patient's chart
- Open a note and fill out all appropriate information
- Click the **Transfer Note** button ("Xfer"), or click **Note > Owner:(User Name)**.
- Highlight the **User** you want to pass the chart note to, and then click the **OK** button.

View Another User's To Do List

- From the main screen, click the **To Do (#)** menu.
- Click **View To Do List...**
- In the Owner dropdown, select the **User** for which you would like to view their To Do List.
- To open an item on their To Do List, highlight the item and click **View** (or double-click on the item).
 - NOTE: This is a "floating" To Do List and will stay open as a separate dialog until you close it.

Sign a Chart Note

- Open a Chart Note.
- Enter and modify any information in the Chart Note.
- To sign the note, click the **Sign** button in the toolbar, or click **Note > Sign**.

Unsign a Chart Note

- Access the Signed Chart Note.
- Click **Note > Unsign**. The note will revert back to the original format with the template choices.
 - NOTE: This can only be done by the user that signed the note originally.

Annotate a Signed Chart Note

- Access the Signed Chart Note.
- Click the **Annotate** button, or click **Note > Annotate**.
- In the Annotation for signed note dialog, enter the **Annotation**.
- Click the **OK** button.