Documentation Tab: Folder types
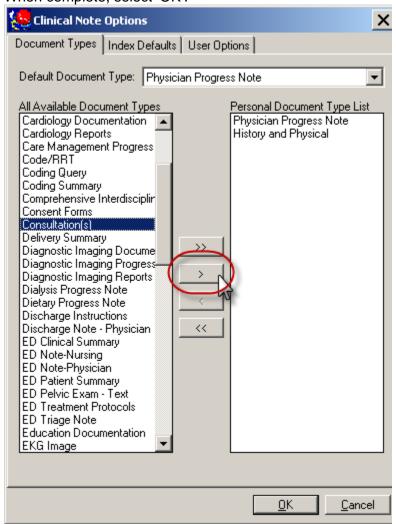
This document covers setting the document folder available in the documentation tab, and the default document type. Select the correct folders

Questions regarding which folder lists to select should be directed to HIM (Medical Records).

Open the Documentation tab. Click on the 'Documents' drop down menu, and select 'Options'.

Default Documentation Folder Types:

From the 'All Available Document Types' column on the left, select and highlight the document types you create. Click the single arrow ">" to move the item to the right hand column, Personal Document Type List. Repeat as needed.
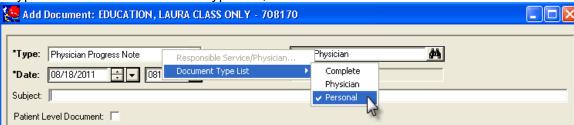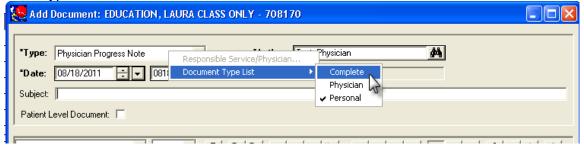When complete, select 'OK'.

To select the Personal Document Type List, add a new document. Right click in the '*Type' box. Select 'Document Type List, and 'Personal'.

When a document is created in the Documentation tab, the drop down filter menu of '*Type:' will now display the selected documents.
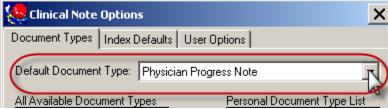

To select a folder type not on the personal document list, right click in the '*Type' box, select 'Document Type List' and 'Complete'. This will allow selection from the complete folder type list.

Default Document Type:

When you create a new document using the 📄 'Add' button, you can set the type of document you most frequently create to be your default.
Under 'Default Document Type', select the type of note you most frequently use. In this example, 'Physician Progress Note' is selected.

When a new document is created, 'Physician Progress Note' will be the default note type. A different note type can be always be selected, if needed.