



## Creating and Deleting Patient Notes

The following steps explain how to use the Patient Notes feature:

1. Browse  for the patient and make active (double clicking on the patient record makes the patient active)
2. Click New Note (lower right hand side of the Patient Address View Window)
3. Double click on the note (if you place your cursor over the new note, a tool tip pops up describing how to create a new note)
4. Click once inside the note (you should see a blinking insertion point)
5. Type your note (remember to always put your initial after each note, e.g. patient seeing double – jr)
6. Close window (click on the close X button)
7. Answer Yes to the following question: “Do you wish to save changes to text before closing this document?”

**Note:** Only the last 5 notes created are displayed in the note field on the Patient Address View window. Previously created notes can be viewed in the notes folders under the patient’s record.

Patient notes can be deleted under the patient record. Although we do not advocate the deletion of any notes on a patient record, there will be times when you’ll need to delete a patient note.

1. Browse  for the patient and make active
2. Open patient record by either double clicking on the patient name or single clicking on the + sign to the left of the patient’s name.
3. Open the Notes folder by either double clicking on the notes folder or single clicking on the + sign to the left of the notes folder.
4. Right click on the note you want to delete.
5. Select Delete Selected Item and click OK
6. Answer YES to the following question: “Are you sure that you wish to delete this note record?”