

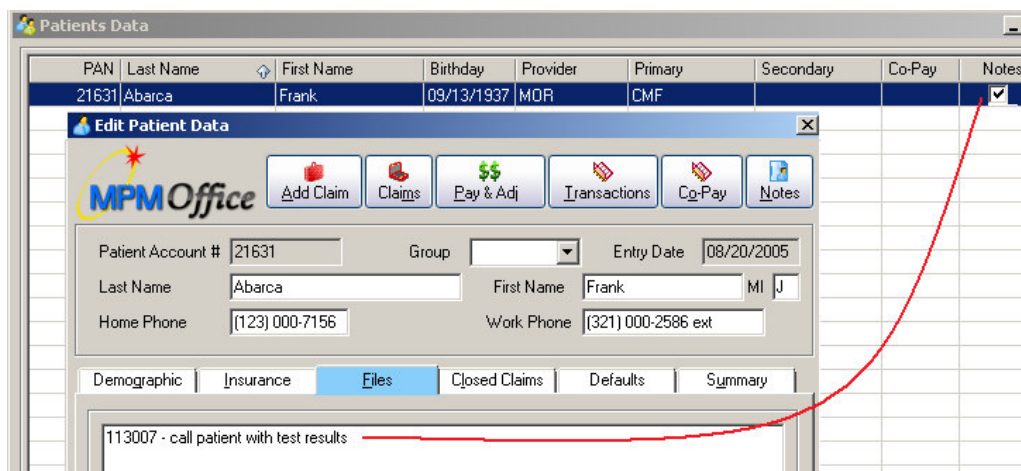
## 15 - USING THE NOTES FEATURE

**Note: You must have purchased the “Notes” feature (option) to be able to use this part of the MPM Office software.**

The MPM Office Notes feature is an Electronic Medical Record (EMR) module that is simplistic yet highly efficient allowing you to create, edit, and save progress notes per Patient and per visit.

The MPM Office Notes feature is template driven, and allows you to keep the notes organized neatly attached to the Patient record for easy accessibility.

From using the MPM Office program, you can see that on the right hand side of the “**Patients Data**” screen appears a column titled “**Notes**”. The boxes that appear in this column are checked off when a free-form note is placed in the blank box that appears under the “**Files**” tab of the “**Edit Patient Data**” screen for a particular Patient.



Although worded similarly, this function is not to be confused with the “**Notes**” feature which we will be training you to use on the following pages.

For instructions on how to enter free-form notes under the “**Files**” tab of the “**Edit Patient Data**” screen for a particular Patient, please review the section in this manual titled “**PATIENTS**”

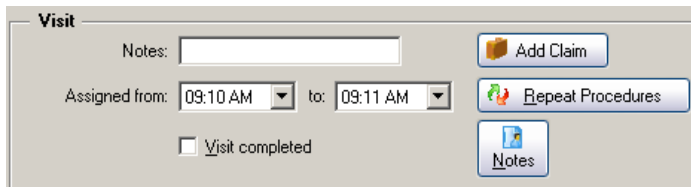
## I. Accessing the Notes Feature

### A. From the “Edit Patient Data” Window



1. From the Left Navigational Menu, left click on the “**Patients**” icon.
2. From the opened “**Patients Data**” window, double click on the name of the Patient you will be creating these notes for.
3. In the newly opened “**Edit Patient Data**” window, click on the far right hand side button labeled “**Notes**” (refer to the picture above).

### B. From the “Schedules” Module



*Note: You must have purchased the “Schedules” module in order to use this section. The patient for whom you are creating these notes must be an existing Patient and not a new Patient.*

1. From the Left Navigational Menu, left click on the “**Schedules**” icon.
2. From the opened “**Schedules**” window, double-click on the patient you will be entering the notes for. In the “**Visit**” section of the newly opened window, on the right hand side, find and click on the “**Notes**” button (see picture above).

## II. Working with Templates

### A. Creating a New Template

1. Once the “**Notes**” feature has been accessed (refer to section “**II. Accessing the Notes Feature**”), a window titled “**Notes Data for patient last name,**

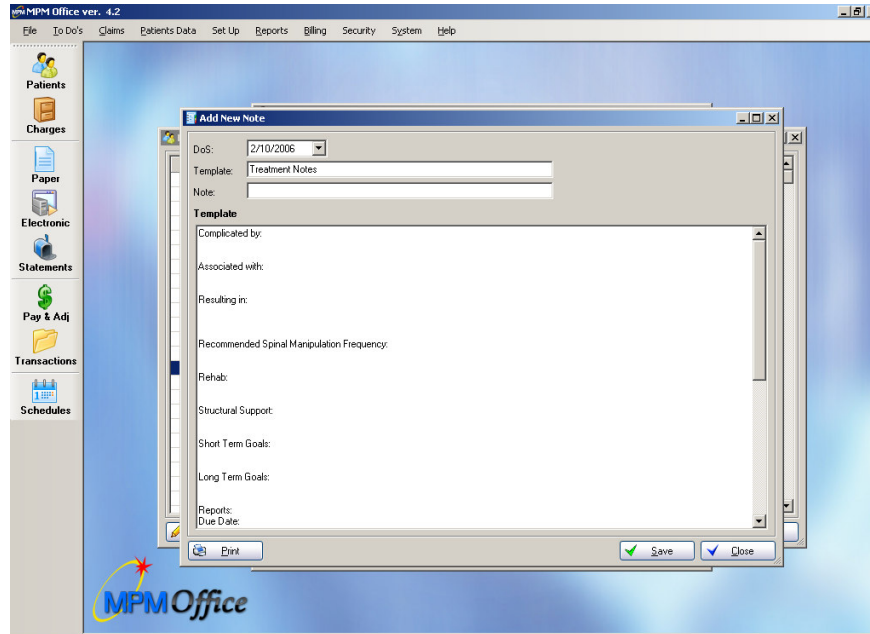
- patient first name*” will open. Click the “**Add**” button (second button on the bottom left side of the window).
2. From the newly opened “**Add New Note**” window click the “**Add**” button (second button on the bottom left side of the window). This will open a new window titled “**Add New Template File**”.
  3. In the field labeled “**File Name**”, enter a name for this new file (i.e.: if you are creating a drug prescription template, enter “*Prescription*” as the name of the file).
  4. In the field labeled “**Template Name**”, enter a name for this new template (i.e.: if you are creating a drug prescription template, enter “*Drug Prescriptions*” as the name of the template).
  5. In the blank area labeled “**Template**”, create your template. You can use this area to create a form like you would using a word processing program (i.e.: MS Word); however, keep in mind that as a *text* based file no formatting can be done (no tables, no change of font size or look).
  6. Click the “**Save**” button to return to the “**Add New Template File**” window.
  7. From the “**Add New Note**” window, click the “**Close**” button, and then click on the “**Close**” button again to return to the “**Edit Patient Data**” screen.

## **B. Working with an Existing Template**

1. Once the “**Notes**” feature has been accessed (refer to the section titled “**Accessing the Notes Feature**”), a window titled “**Notes Data for patient last name, patient first name**” will open.
2. Click on the “**Add**” button (the second button located on the bottom left side of the window). From the newly opened “**Add New Note**” window, left click on the template you wish to use. The “**Preview**” window right below will display what you selected. When ready, click the “**OK**” button located as the second button from the right hand side of the window.
3. From the newly opened “**Add New Note**” window, fill in the following information:
  - a) In the field labeled “**DoS**”, select the date of service from the menu that appears in this field.
  - b) In the field labeled “**Note**”, add a brief description of what this form is going to be used for.
4. In the blank area labeled “**Template**”, enter the information you want in the space provided. You can make changes to this template; however, those changes will only apply to this specific entry and will not be made a permanent change to the template.
5. Click on the “**Save**” button located on the bottom right hand side of this screen when done.
6. If the entry is as you want it to read, click on the “**Close**” button on the bottom right hand side to return to the “**Edit Patient Data**” screen. If changes still

need to be made, click on the “**Edit**” button located on the bottom left hand side of the screen and follow steps 3 through step 5 again until you are done.

Here is a sample template attached to a date of service and ready to be filled in:



### C. Printing Notes

1. Once the “**Notes**” feature has been accessed (refer to section titled “**Accessing the Notes Feature**”), a window titled “**Notes Data for patient last name, patient first name**” will open.
2. Left click on the template you wish to print, and then click on the “**Print**” button located on the right hand side of the window.
3. In the opened preview page, click again on the “**Print**” button (the second button from the right hand side of this window), and proceed in selecting the printer to use, number of pages, etc. Click on the “**Ok**” button when you are ready to print.

### D. Emailing Notes

Technically, emailing the created notes is possible but not directly through the program. You must install a third-party application (such as a Portable Document File creator – PDF – creating program from Adobe, or other similar program), and then print the file as a PDF (instead of an actual printed document). You can then email the PDF file as an attachment to your email.