Creating and Using Macros

07/24/2024 1:30 pm EDT

Macros can be a great tool to help streamline your workflows and make charting much more efficient. Macros can be used to auto-populate commonly used phrases or notes as well as pull patient information automatically into your Clinical Note.

1. To get started with Macros, go to **Clinical > Macro Buttons**:

Clinical	Patients	Reports	Billing				
FORM TOOLS							
Form Bui	lder						
Form Bui	Form Builder (beta)						
Tag Mana	agement						
Library							
Archive	Archive						
Archive (I	Archive (beta)						
Form Reorder							
Complete Note Format							
onpatient Forms							
Macro Bu	uttons						
Document Management							

2. To create a new Keyboard Macro, enter a description in the label field and then begin typing desired patient information in the generated text box. You may use the preset radio buttons to enter pre-populated information from the patient's chart. Click **Save keyboard macro** to save the macro for your account.

Schedule	Clinical Patients Reports Billing	Account	Marketplace	Help	×				
Manage	FORM TOOLS Form Builder								
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	Tag Management						Prese	et Radio But	tons
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Drag fields	Archive (beta)		New Clini	cal Ke	eyboard M	lacro			
	Form Reorder		Patient's	Name	🛗 Service	Date O Service	Date & Time	Pt Demogr 👻	Delete macro
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	Macro Buttons		Label						
≡ Comm	Document Management					Description			
≡ Test (K	CLINICAL								
	Clinical Notes		Generated te	ext					
\equiv How a	Audit Log								
≡ Foot P	CDS Rules								
⊟ Mood	Inventory Management								
	Patient Education Management								
≡ Safety	MU REPORTING								
⊟ Back F	Meaningful Use Certification Edition 2015								
Dack F	MIPS/MACRA								
≡ PTSD	Clinical Quality Measures					Save keybo	ard macro		

3. Now that you have saved your macro, you should see all of your custom macros listed on the left side of the macros page. You can re-organize your macros by clicking and dragging them in the order you'd like them to appear on your iPad or the web. The provider's name who created the macro appears next to it.

Manage Macro Buttons

Build your own customized iPad keyboard clinical macros

Drag fields to re-order your list. Click on a field to edit.						
■ Normal Exam (Sample Provider)						
⊟ HPI (Sample Provider)						
PT (Sample Provider)						
■ Post Op Comments (Sample Provider)						
Physical (Sample Provider)						
\equiv NECK: Cervical spine range of mo (Sample Provider)						
■ Blank (Click to Add Value)						

4. While on the iPad: when writing a clinical note, any free text fields will allow you to select a custom macro on your iPad. Selecting a macro will automatically pull in your text:

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5. Macros can also be used on DrChrono's web EHR in the clinical note. You have the option to use your macros with the free text fields in your clinical notes on the web.

Location	Comments
Quality	Macros
	MSE Homecare HPI Normal Exam Treatment Note
	Pain Assessment High BP Neck pain PT Sleep Issues
0 ''	Diabetic Plan Post Op Comments Physical Example Macro
Severity	Test Macro NECK: Cervical spine range of mo Glaucoma
	Bone Marrow in Lumbar Spine [referring dr] Marco Name

6. To delete a Macro: From the web go to **Clinical** > **Macro Buttons** select your Macro, and click **Delete macro**.

Note: Macros cannot be recovered once deleted.

Editing Patient Name								
			Delete macro					
▲ Patient's Name Servic	e Date O Servio	ce Date & Time						
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Custom Pt Demogr 👻								
Label								
Patient Name Description								
Generated text								
{{patient}}								