



## Patient Charts in MacRep – Win & Mac

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Here are the instructions for creating a new patient record or opening an existing patient's record in **MacRepertory**:

**TIP: make ensure you are attempting to open the chart from within MacRepertory, not just double clicking on the patient file name in the MacRepertory folder\Cases.**

### **To create a NEW chart please open MacRepertory and...**

- 1) Go to **File** menu/**New patients** chart.
- 2) Name the chart and save it in the **MacRepertory\Cases** folder (or where ever you would like the chart saved).
- 3) The patient window will then appear
- 4) Click on the **icons** to add information, prescriptions, etc.; you may also click on the **icon name** to rename the icon.
- 5) Leave the chart open and, by using the **tool pallet**, click on the **blue book** icon that represents the section icons. Click on a section and **gather rubrics** to the clipboards (A-D 1-6) etc.
- 6) Open the clipboard and go to **File** Menu. Select "**Save Rubrics**".
- 7) Another icon will appear in the patient chart window called "**Rubrics Clipboard**" (click on the **name** if you would like to rename this icon).
- 8) Now you can make and save graphs, notes, etc. in the same way. Make sure the window you wish to save is the **forward active window** and then go to File Menu and select "**Save.....**".

### **To open an EXISTING chart, please open MacRepertory and...**

- 1) Go to File Menu/Open patients chart. A window will appear.
  - **PC** users: It will say "Look in" near the top.
  - **Mac** Users: The Cases folder should appear next to up & down arrows. If not, maneuver the up & down arrows to locate the cases folder.
- 2) You need to be "Looking in" the place you saved your charts.
- 3) Each Windows chart will have 2 files - a **\*.cas** & **\*.rsr**. (The Macintosh charts just one).
- 4) Now locate the chart you wish to open and it will open to today's date. To see previous days sessions, please use the horizontal scroll bar at the bottom of the window.