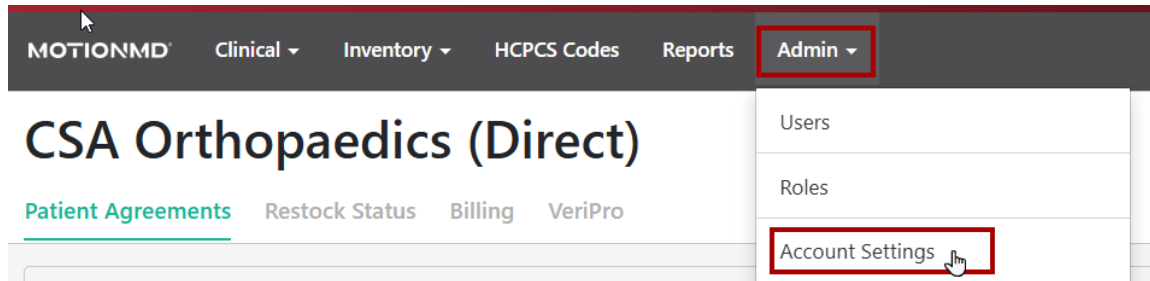


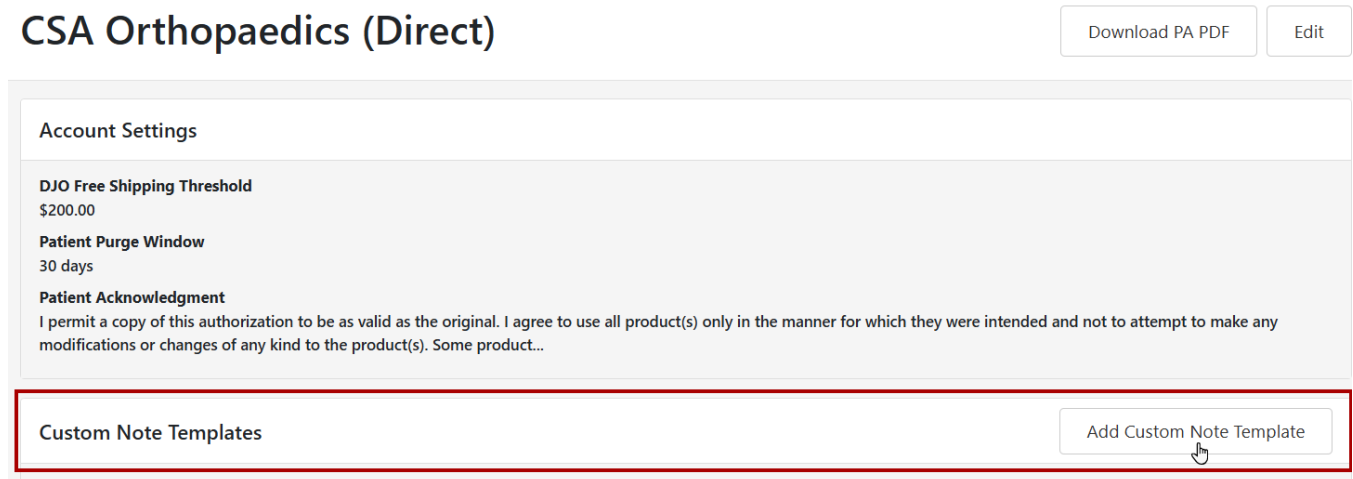
NOTE TEMPLATE CUSTOMIZATION

This feature allows customers to create Custom Note Templates that can be quickly added to a Patient Agreement via the Notes Section. An account must be PRO Tier and have the Note Template Customization feature enabled to add and manage Note Template Customization. Only users with the Admin role will be able to access and create custom notes.

To view the feature, navigate to the Admin dropdown in the navigation bar and select 'Account Settings'.



The 'Custom Note Templates' section will be displayed. Click the 'Add Custom Note Template' button to add a new template.



NOTE TEMPLATE CUSTOMIZATION

A model will open to add a title and the custom note template wording, then click 'Save Changes'.

Note: There is a 100-character limit to the title and a 585-character limit to the note.

Add Custom Note Template

Required fields are marked with an asterisk (*)

Title *

Test

Custom Note Template *

Test Custom Note Template

Cancel Save Changes

Once created, the Custom Note Template can be added to the Patient Agreement in the Notes section.

Patient Agreements

MOTIONMMD Clinical Inventory HCPCS Codes Reports Admin

CSA Orthopaedics ... Help

Test Patient

ID 117184

CSA Orthopaedics (Main)

Actions

Missing 5 Requirements

ICD-10 Codes 0

Products 0

Payment Methods 0

Signatures (0/2)

0 1

Created on 05/05/26

(Updated 05/05/26) by Stacey Fowler

Face-to-Face Encounter

Date

Length of Need

Edit

Add Provider Signature

Attachments Add Custom Forms

Notes Add

Billing Note 05/05/2026 at 02:12 PM Stacey Fowler

Test Custom Note Template

Edit Remove

Note: The Custom Note Template can be edited or removed at any time.