**Providers and other staff can create auto text to insert frequently used phrases into a note or message. Auto text is beneficial in that it saves time and streamlines documentation.**

| | |
|---|---|
| **NOTE:** | **Auto text can be inserted in a PowerNote in the white space found after the note heading or the space before and after text within the textual rendering of the note.** |

| Icon | Name |
|---|---|
| | **Manage Auto Text** icon |
| + | **+** icon |
| Save | **Save** button |
| X | **X Close** button |
| Edit... | **Edit** button |
| Delete | **Delete** button |
| Duplicate... | **Duplicate** button |
| Convert to RTF > | **Convert to RTF** button |

| Icon | Name |
|---|---|
| | **Create Drop List** icon |
| + Add List Item | **Add List Item** button |
| (x) :: | **List Item Delete/Edit** buttons |
| Create | **Create** button |
| | **Insert Templates/Tokens** icon |
| Insert | **Insert** button |

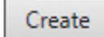| | |
|---|---|
| **NOTE:** | **When creating auto text, the formatting tools appear as active and if used, the selections do not hold. The final auto text will always display as plain text.** |

## Creating Auto text
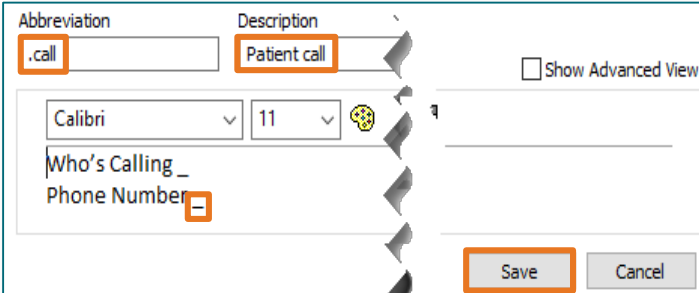
| | |
|---|---|
| **STEP 1:** | Click in an area of a note, Workflow MPage Dynamic Documentation component or Message Center that allows for free text. |
| **STEP 2:** | The text editor toolbar is enabled at the top of the Document Viewer, click the **Manage Auto Text** icon to open the **Manage Auto Text** window. |
| **STEP 3:** | Click the **+** sign in **My Phrases**. |
| **STEP 4:** | Add an abbreviation and description of the auto text. |
| **NOTE:** | **The abbreviation is the shortcut used to quickly enter an auto text phrase. It should start with a symbol and be short and easy to remember. Examples include ".ros" or ".physical." System auto text phrases begin with a forward slash (/). To distinguish between system and personal auto text phrases, personal auto text should always begin with a dot (.) Abbreviations are case sensitive, create an abbreviation exactly as used.** |

STEP 5:    Free text the auto text phrase in the text box.

NOTE:    **Adding an underscore to auto text phrase enables the ability to use the F3 key or M*Modal to quickly navigate to sections of an auto text that need information.**

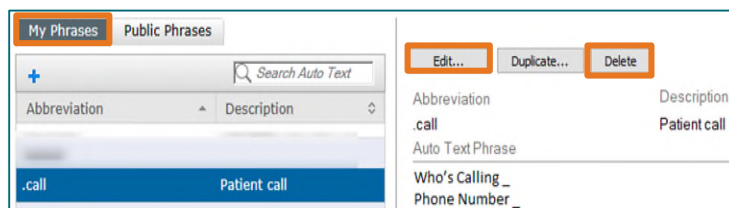STEP 6:    Click **Save**.

## Modifying an Auto Text Phrase

STEP 1:    Navigate to the **Manage Auto Text** window.

STEP 2:    Click the auto text in the **My Phrases** tab.

STEP 3:    Click **Edit**.

STEP 4:    Update content as needed.

STEP 5:    Click **Save**.

NOTE:    **To delete an auto text, select the auto text in the My Phrases tab, then click Delete in the right pane.**

## Duplicating an Auto Text Phrase

TIP:    **Duplicating public auto text phrases makes creating personal auto text phrases easier.**

STEP 1:    Navigate to the **Manage Auto Text** window.

STEP 2:    Click the **Public Phrases** tab.

STEP 3:    Enter the auto text phrase to be duplicated in the **Search Auto Text** field.

  ▪ Browse through the Public Phrases using the page buttons if needed

STEP 4:    Select the auto text phrase.

STEP 5:    Click **Duplicate**.

STEP 6:    Update the abbreviation in the **Abbreviation** field.
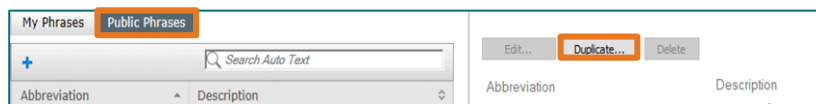
NOTE:    **System auto text phrases use a forward slash (/), rename the phrase Abbreviation starting with a dot (.).**

STEP 7:    Update the text in the text box as needed.

NOTE:    **To make auto text available for use in the Message Center, click Convert to RTF.**

STEP 8:    Click **Save**.

## Creating Drop Lists

STEP 1:    Navigate to the **Manage Auto Text** window.

STEP 2:    Highlight text within an auto text phrase to convert to a drop list or place cursor where the **Drop List** should go.

STEP 3:    Click the **Create Drop List** icon ▤ in the toolbar.

STEP 4:    Free text list items in the **Add New List Item** field, hit enter key.

STEP 5:    Repeat step 4 for each list item.

STEP 6:    Set a default list item by selecting the button next to any list item in the **Default** column.

STEP 7:    Edit, delete, rearrange, and/or add multiselect.

- To change the order of list items, click and drag the icon on the left.
- To delete, use the **X** icon.
- To edit, click the list item and free text.
- To make list items multiselect, check the **Multiselect** box.

STEP 8:    Click **Create**.

STEP 9:    Click **Save**.

## Adding Templates and Tokens

Templates and Tokens pull discrete data from a patient's chart into a note or message (i.e., patient demographics and certain results).

STEP 1:    Navigate to the **Manage Auto Text** window.

STEP 2:    Highlight text or place cursor where a template/token should go.
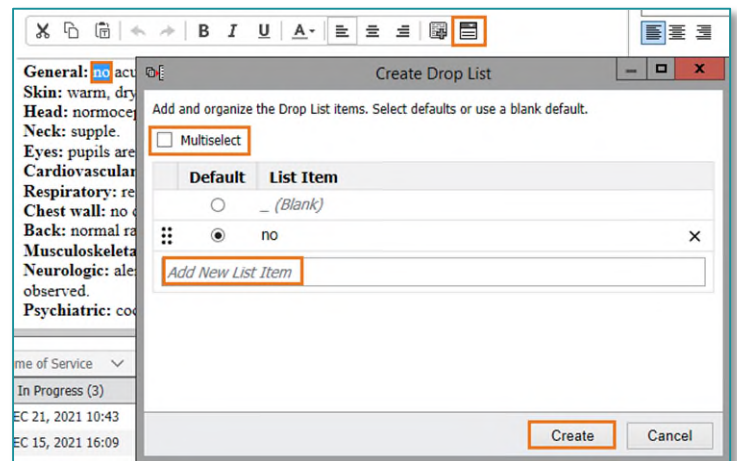
STEP 3:    Click the **Insert Templates/Tokens** icon.

STEP 4:    Search for a template/token using the **Search Templates/Tokens** field.

- Browse through Templates/Tokens using the page buttons, if needed.

STEP 5:    Select the template/token.

- A preview of the data displays on the right.

STEP 6:    Click **Insert**.

STEP 7:    Click **Save**.

NOTE:    **If using Auto Text within Clinical Entry Workspace, Data Tokens are not supported so they will need to be updated to Smart Templates.**

## How to update an Auto Text with a Data Token to a Smart Template

STEP 1:    Click the **Manage Auto Text** icon.

STEP 2:    Click the auto text in the **My Phrases** tab.

STEP 3:    Click **Edit**.

STEP 4:    Backspace to remove the data token.

STEP 5:    Click the Insert **Templates/Tokens** icon.

STEP 6:    Search for a corresponding **Smart Template** to replace the Data Token using the Search Templates/Tokens field.

STEP 7:    Click **Insert**.

STEP 8:    Click **Save**.

## Inserting Auto Text

STEP 1:    When free texting in a note, enter the first few characters of an auto text abbreviation to display selections.

NOTE:    **Typing more of the abbreviation shortens the list of options.**

STEP 2:    Use arrow keys to move up and down the list of auto text options.

STEP 3:    Press **Enter** or double-click to select the auto text.

STEP 4:    Make necessary edits as needed.