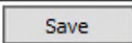
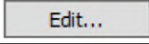
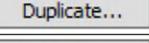
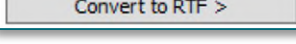


Providers and other staff can create auto text to insert frequently used phrases into a note or message. Auto text is beneficial in that it saves time and streamlines documentation.

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.

	Manage Auto Text icon
	+ icon
	Save button
	X Close button
	Edit button
	Delete button
	Duplicate button
	Convert to RTF button

	Create Drop List icon
	Add List Item button
	List Item Delete/Edit buttons
	Create button
	Insert Templates/Tokens icon
	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

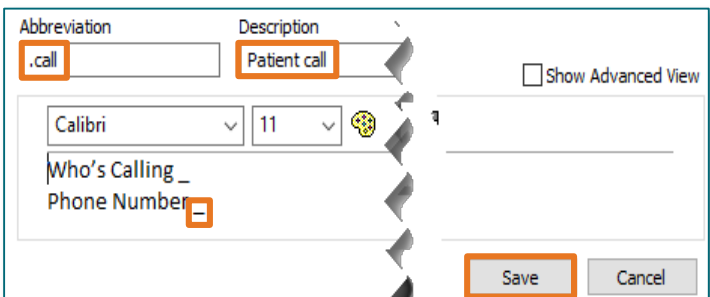
STEP 1: Click in an area of a note, Workflow MPage Dynamic Documentation component or Message Center that allows for free text.

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:

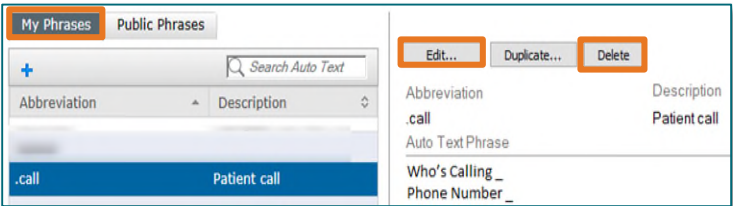
Navigate to the Manage Auto Text window.
- STEP 2:

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:

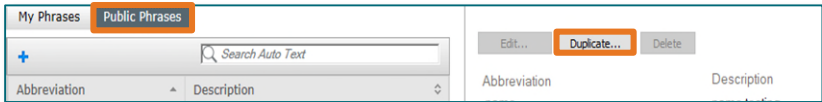
Select the auto text phrase.

- 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.

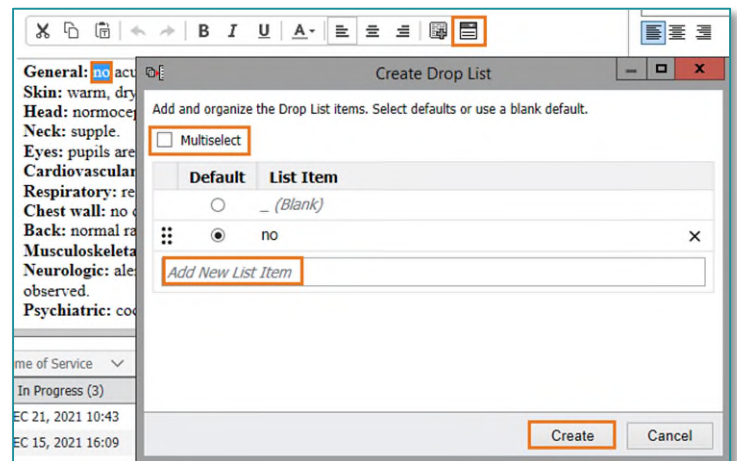
STEP 6: Set a default list item by selecting the button next to any list item in the **Default** column.

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.

