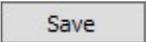
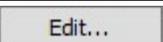
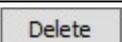
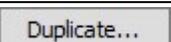
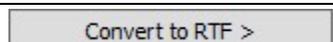
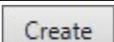
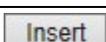

This Quick Reference Guide (QRG) reviews the steps for Managing Auto Text

Common Buttons & Icons

| | |
|---|------------------------------|
|  | 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 |

Build a New Auto Text Phrase

➤ **From the Provider View workflow page:**

STEP 1: Click the **Manage Auto Text** icon. The Manage Auto Text window displays.

STEP 2: Click the **+** icon.

STEP 3: Enter an abbreviation in the **Abbreviation** field.

NOTE: The assigned abbreviation will be the shortcut used to quickly enter the auto text phrase text. It should start with a symbol and be short and easy to remember. Examples include “.ROS” or “.Physical.”

NOTE: The system auto text phrases use a forward slash (/), so you should always use a dot (.) to distinguish your personal auto text phrases. Abbreviations are case sensitive, so you need to enter the abbreviation exactly as you want to use it.

STEP 4: Enter a description of the auto text in the **Description** field, if desired.

STEP 5: Enter the text that will be pulled in as a template in the **Text** field.

STEP 6: Click **Save**.

STEP 7: Click the **X Close** button to return to the workflow page.

Modify an Auto Text Phrase

➤ **From the Manage Auto Text window:**

STEP 1: Click the phrase you wish to modify in the My Phrases tab.

STEP 2: Click **Edit** in the right pane.

STEP 3: Update the fields as necessary.

STEP 4: Click **Save**.

NOTE: To delete one of your phrases, click the phrase in the My Phrases tab; then click Delete in the right pane.

Duplicate an Auto Text Phrase

➤ From the Manage Auto Text window:

STEP 1: Click the **Public Phrases** tab.

NOTE: An easy way to create personal auto text phrases is to duplicate an existing public phrase and customize it to your liking.

STEP 2: Enter the auto text phrase you want to duplicate in the **Search Auto Text** field; then press [**Enter**].

NOTE: You can also browse through the pages of results at the bottom.

STEP 3: Click the auto text phrase you wish to duplicate.

STEP 4: Click **Duplicate** in the right pane.

STEP 5: Update the abbreviation in the **Abbreviation** field.

NOTE: System auto text phrases use a forward slash (/), so you want to rename the phrase with a dot (.).

STEP 6: Update the templated text in the **Text** field.

NOTE: If you would like this auto text available to you in the Message Center, click **Convert to RTF**.

STEP 7: Click **Save**.

Create a Drop List in an Auto Text Phrase

➤ From the Manage Auto Text Creation/Modification window:

STEP 1: Highlight the text you want to transform into a drop list.

STEP 2: Click the **Create Drop List** icon.

STEP 3: Enter an option you wish to add to the list in the **New Item** field.

STEP 4: Click **Add List Item**.

STEP 5: Repeat steps 3 and 4 for each list item; then press [**Enter**] after entering the last item.

NOTE: If you need to edit or delete an item from the list, use the icons at the end of the row.

STEP 6: Set the default selection by dragging an option to the top of the list.

NOTE: To have the default selection be blank, select the Use Default check box.

STEP 7: Click **Create**.

Add Templates and Tokens to an Auto Text Phrase

➤ **From the Manage Auto Text Creation/Modification window:**

STEP 1: Highlight the text you want to replace with a template or token.

STEP 2: Click the **Insert Templates/Tokens** icon.

STEP 3: Enter the type of template/token you want in the **Search Templates/Tokens** field.

NOTE: You can also browse through the pages of results at the bottom.

STEP 4: Click the template or token you wish to add.

NOTE: A preview of how the data will pull in displays on the right.

STEP 5: Click **Insert**.

Use Auto Text

➤ **From the Provider View workflow page:**

STEP 1: Click the field you wish to document.

STEP 2: Type the auto text phrase abbreviation. A list of matching auto text abbreviations display.

STEP 3: Click the desired auto text phrase; then press [**Enter**].

NOTE: You can also double-click the desired phrase.

STEP 4: Update the templated text as appropriate for your patient, if needed.

NOTE: The F3 key will move you to the first underscore, if available, where you can start typing right away.