



Auto Text, Smart Tokens and Drop-Down List Functionality

Care Delivery

Quick reference guide

Creating an Auto Text

1. Open a patient's chart & select **Documentation** from the menu bar
2. Click **Add**
3. Select any type of note from the **Type** dropdown list and select **Freetext Note** from the **Note Templates** list.
4. Click **OK**
5. Click the  symbol, which will open the **Manage Auto Text** window.
6. Click the  symbol.
7. In the **Abbreviation** field, enter the grave “ ` ” symbol on your keyboard (top left side of your keyboard, under the ESC button), followed by a short name to identify your Auto Text. For example, `trauma.
8. In the **Description** field, enter the title of the Auto Text for example, **Trauma Tertiary Survey**.

Abbreviation	Description
`trauma	Trauma Tertiary Survey


Tahoma Size




9. Enter the body of the Auto Text into the blank field and click **Save**.

Abbreviation	Description
`trauma	Trauma Tertiary Survey

Tahoma 8

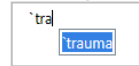


Trauma Tertiary Survey
 Mechanism of Injury / History: _
 Injuries: _
 Airway: _

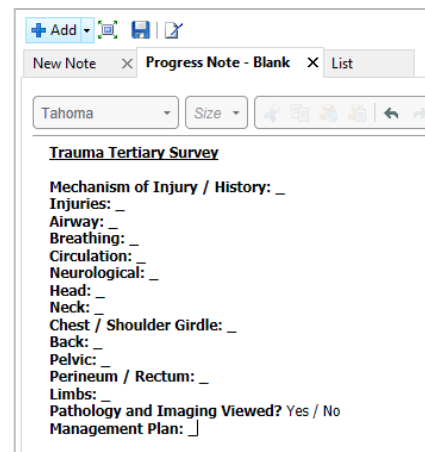
10. Click  to exit the Auto Text window.





Using an Auto Text in a document

1. Open and title your document.
2. Enter the name of the Auto Text in the blank documentation field. For example, `trauma.




3. Press **Enter** (on keyboard).
4. The Auto Text will appear within the note.





+ Add   
 New Note x Progress Note - Blank x List
 Tahoma Size 
Trauma Tertiary Survey
 Mechanism of Injury / History: _
 Injuries: _
 Airway: _
 Breathing: _
 Circulation: _
 Neurological: _
 Head: _
 Neck: _
 Chest / Shoulder Girdle: _
 Back: _
 Pelvic: _
 Perineum / Rectum: _
 Limbs: _
 Pathology and Imaging Viewed? Yes / No
 Management Plan: _

5. Enter any additional documentation and **Sign/Submit**.

Modifying an Auto Text

1. Click the  symbol.
2. Click on the Auto Text you wish to modify, then click the **Edit Button**.
3. Make the required changes to the body of the Auto Text, then click **Save**.


Smart Token

1. Click the  symbol, which will open the **Manage Auto Text** window.
2. Click the  symbol.
3. Click the insert template/token icon.



- Find desired Template/Token and double click to select. For example, Vital Signs 2012.

Insert Templates/Tokens	
Search Templates/Tokens	
Name	Type
Tracking Events	Data Token
Tracking LOS	Data Token
Treatment Area LOS	Data Token
Vaginal Examination	Smart Template
Vital Signs 2012	Smart Template

- In the **Abbreviation** field, enter the “ ` ” symbol on your keyboard (top left side of your keyboard, under the ESC button), followed by a short name to identify your Auto Text. For example, `VS.
- In the **Description** field, enter the title of the Auto Text for example, **Vital Signs**.
- Click **Save**.
- Click  to exit the Auto Text window.
- Enter any additional documentation and **Sign/Submit**.

- Press **Add List Item**.
- Enter desired drop-down options. (Note: *Press add list item for every additional option*).

Create Drop List

Add and organize the Drop List items. The first item in the Drop List will be selected by default.

+ Add List Item Use Blank Default

_ (Default)



Yes

No

- Click **Create**.

Creating Smart Drop Down options in Auto Text

Note: For additional options when creating an Auto Text, see the below instructions for creating drop down options.

- Click the  symbol, which will open the **Manage Auto Text** window.
- Click the  symbol.
- Click the **Create Drop List icon**.



- Select **Use Blank Default**.

Create Drop List

Add and organize the Drop List items. The first item in the Drop List will be selected by default.

+ Add List Item Use Blank Default

