

# Creating Auto Text in Dynamic Documentation or PowerNotes

In this handout you will find instructions on how to create, modify and view an Auto Text phrase to quickly import information into Dynamic Documentation or PowerNote.

**Why Use Autotext?** – Autotext is a powerful way to re-use phrases or sections of documentation you find you use over and over. By carefully formatting these phrases or paragraphs you can assure they display correctly time and time again. By including smart templates or data tokens you can also add some flexibility to your autotext phrases – pulling in data from the EMR in a dynamic fashion.

Accessing the Autotext Manager – p. 1	Creating an Auto Text with a Smart Template – p. 6-8
Creating Auto Text – p. 2-3	Inserting Auto Text – p. 9
Modifying existing Auto Text – p. 4	Viewing a list of Auto Text – p. 10
Deleting an Auto Text – p. 5	Creating a Drop List – p. 11-12

## Accessing the Auto Text Manager

You can find the Auto Text Manager in the following locations. Click on the icon to open it.

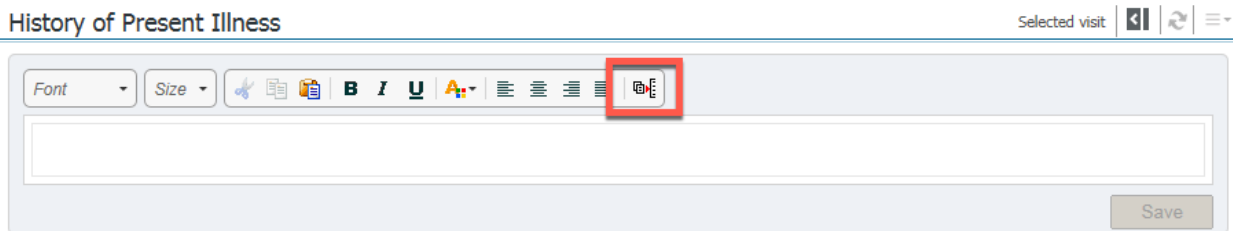
### In PowerNote



### In Dynamic Documentation



### In Workflow



### In Message Center



## Create a new Auto Text

Document Viewing [Full screen] [Print] 10 minutes ago

Office Visit Note List

Tahoma 9

**Chief Complaint**

**History of Present Illness**

**Review of Systems**

**Physical Exam**

Vitals & Measurements  
HT: 177 cm WT: 70 kg BMI: 22

**Assessment/Plan**  
Migraine

**Social History**

**Family History**

**Immunizations**

**Health Maintenance**

**Lab Results**

**Diagnostic Results**

Note Details: Family Medicine Clinic Note, Test Hinton NSS, Elaine L, 05/31/2016 8:52, Office Visit Note

Sign/Submit Save Save & Close Cancel

C810 THINTONE May 31, 2016 09:03

1. Click in a free text area of any new or existing note to allow the auto text icon to appear; then click **Manage Auto Text** icon

Manage Auto Text [Show Auto Text Notifications]

My Phrases Public Phrases

+ Search Auto Text

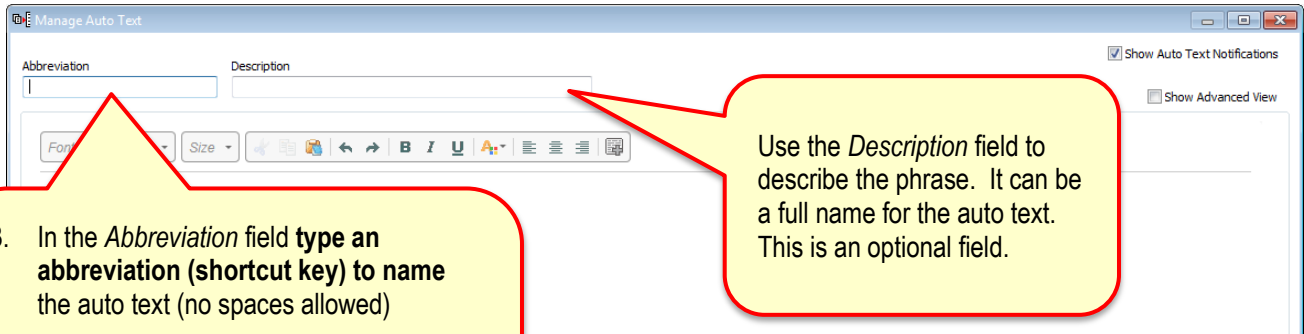
Abbreviation Description

Auto Text Phrase

Previous Next

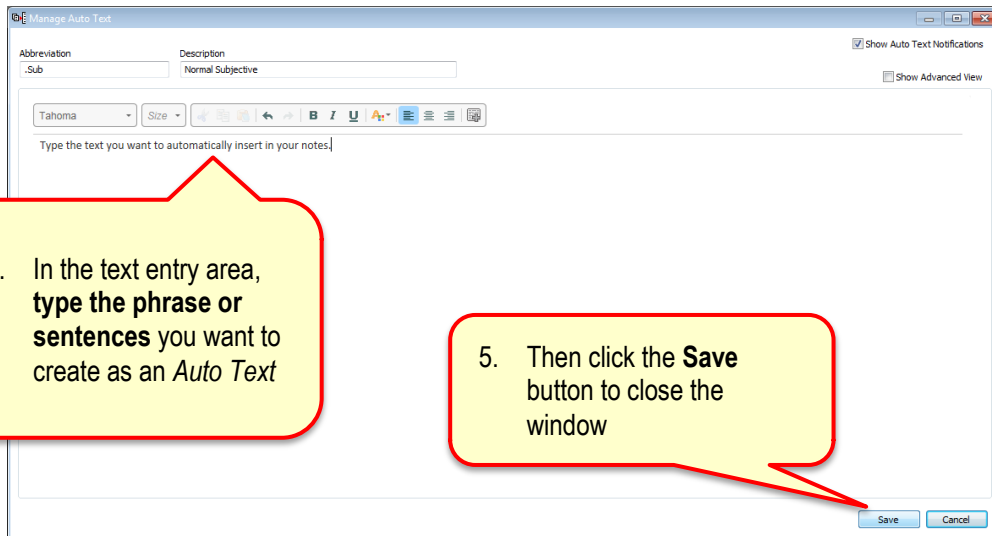
Edit... Duplicate... Delete

2. Click the **Add New Phrase (Plus)** icon to create a new auto text.



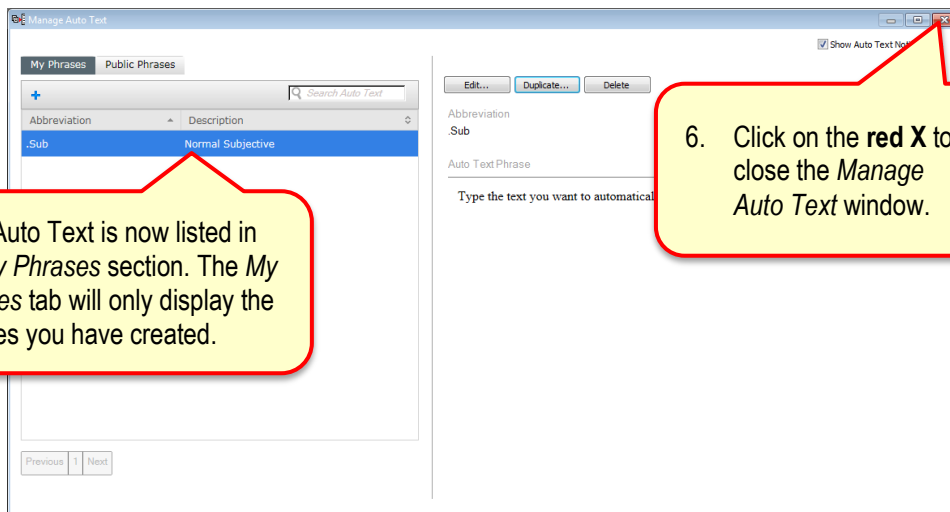
3. In the *Abbreviation* field **type an abbreviation (shortcut key)** to name the auto text (no spaces allowed)

It is suggested to start your abbreviation with a unique letter, such as a z or a period. Remember it will be case sensitive if you use a capital letter.



4. In the text entry area, **type the phrase or sentences** you want to create as an *Auto Text*

5. Then click the **Save** button to close the window

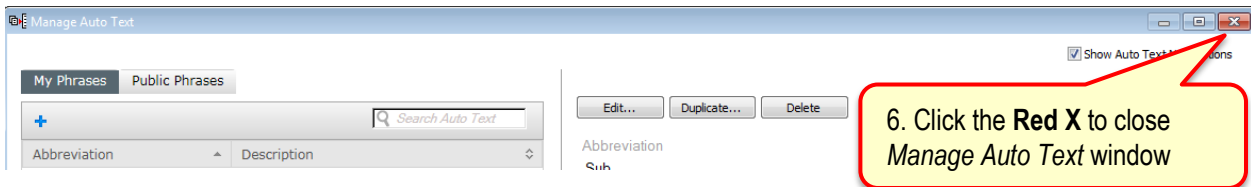
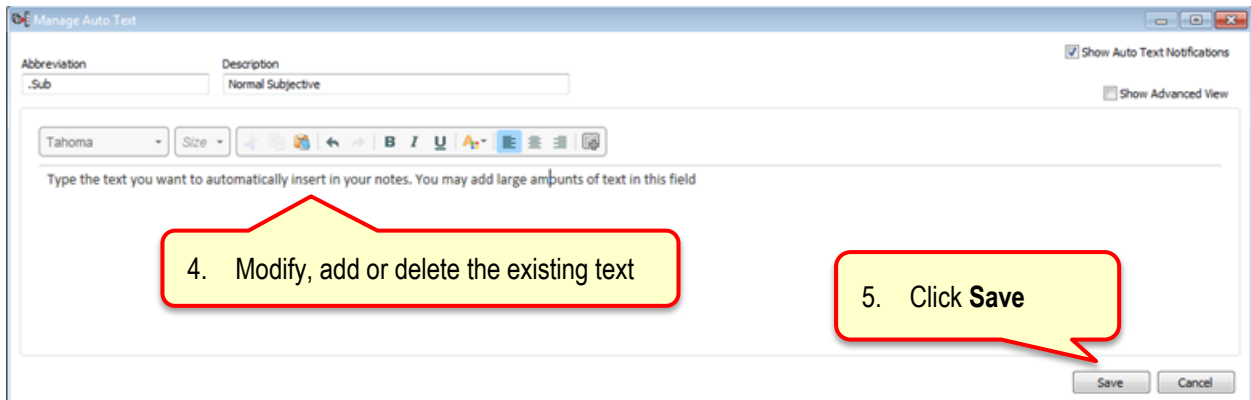
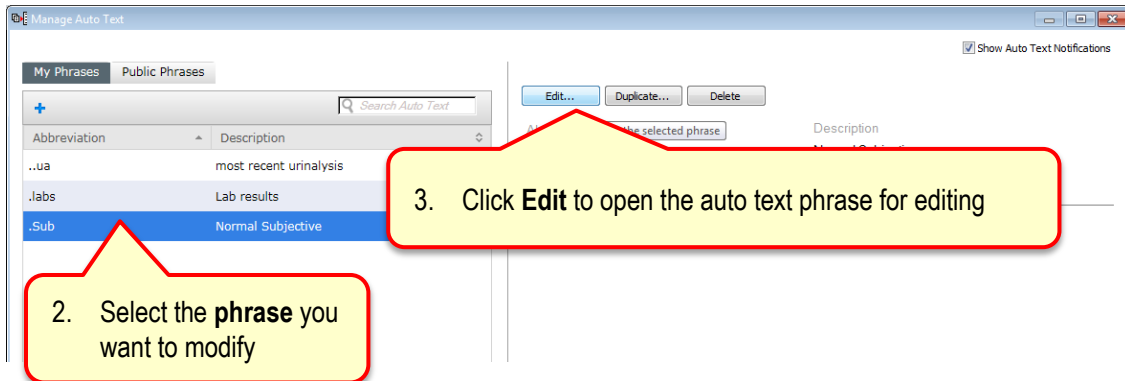
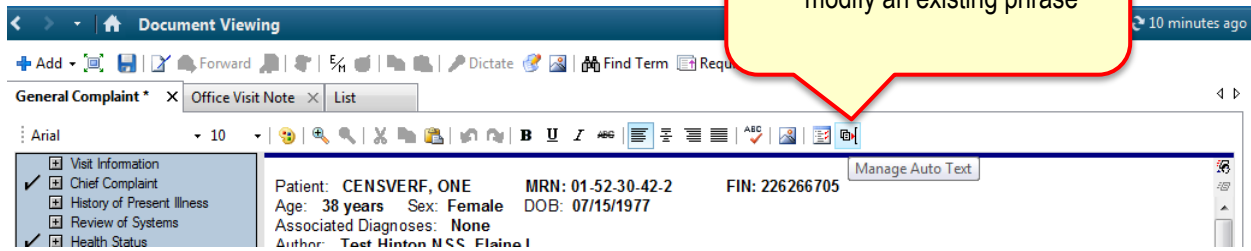


Your Auto Text is now listed in the *My Phrases* section. The *My Phrases* tab will only display the phrases you have created.

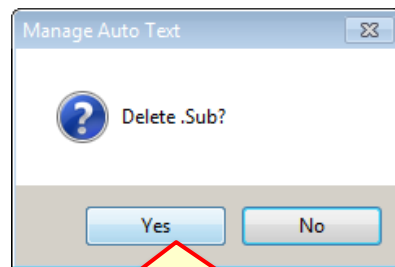
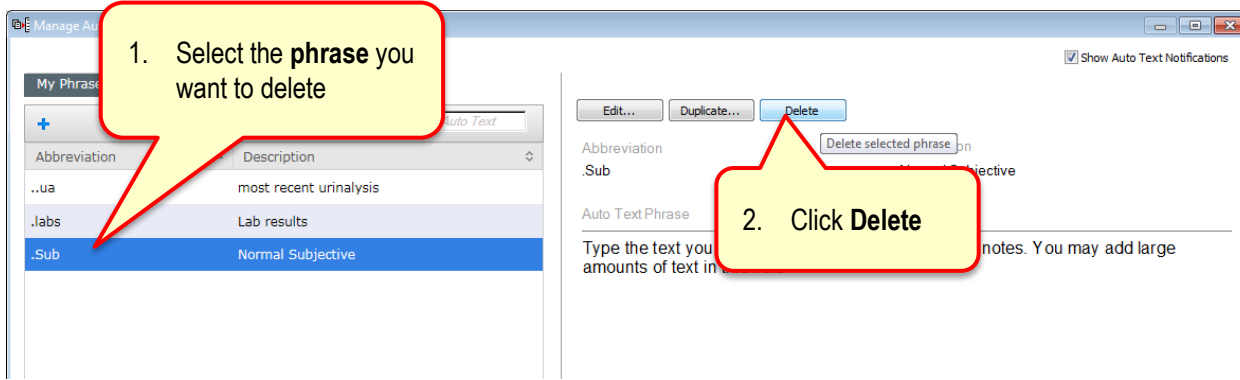
6. Click on the **red X** to close the *Manage Auto Text* window.

## Modifying an existing Auto Text

1. Click **Manage Auto Text** to modify an existing phrase

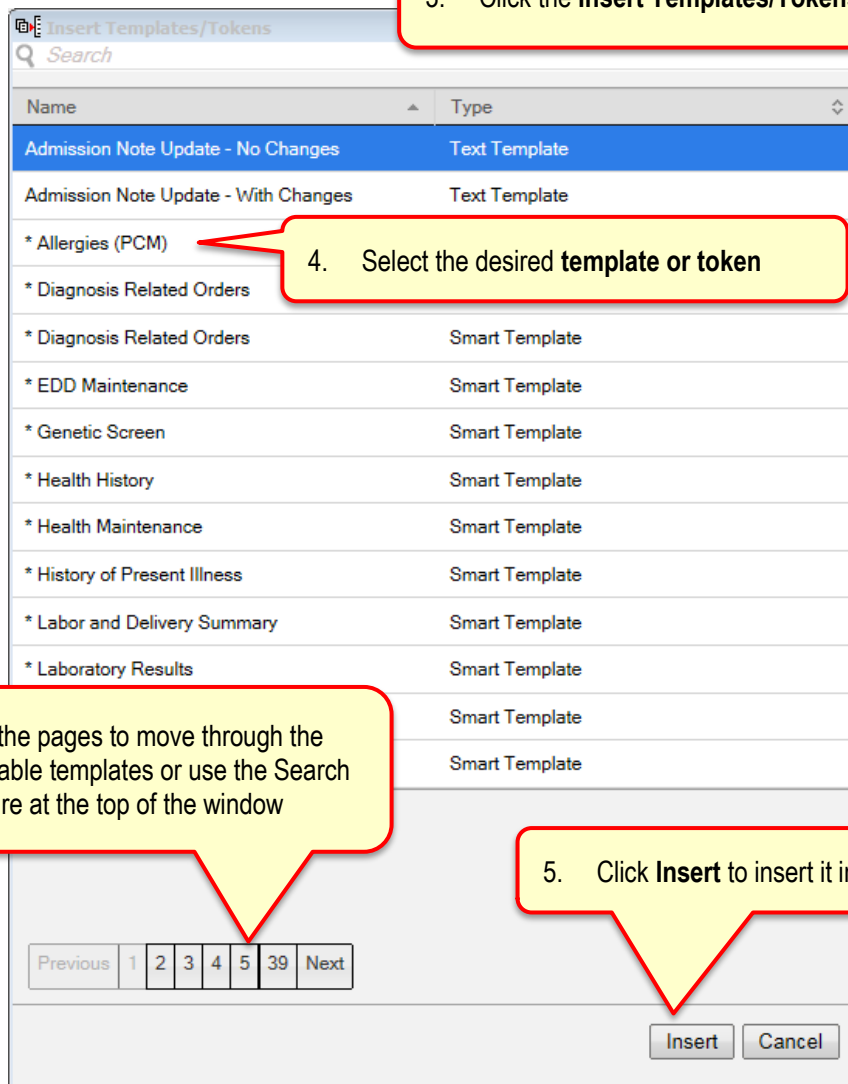
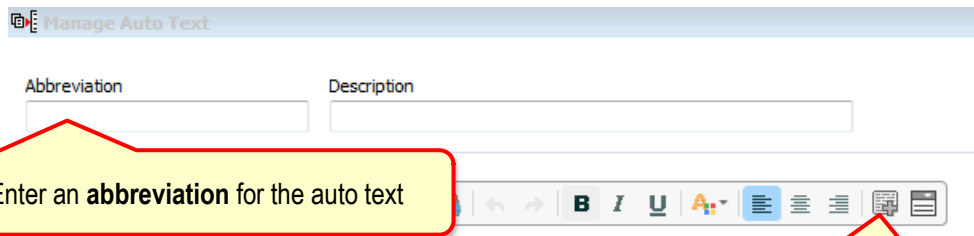
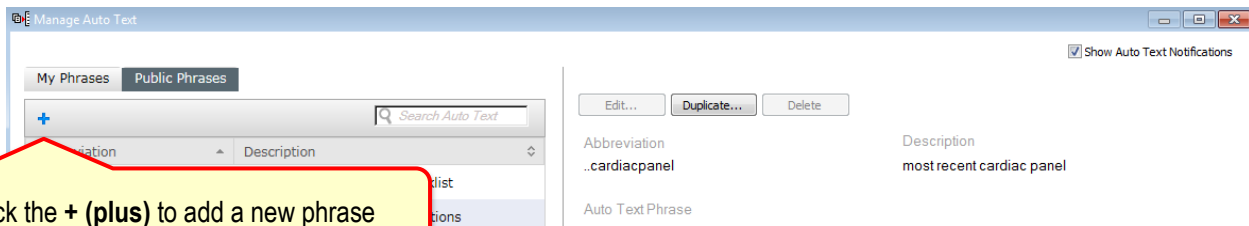


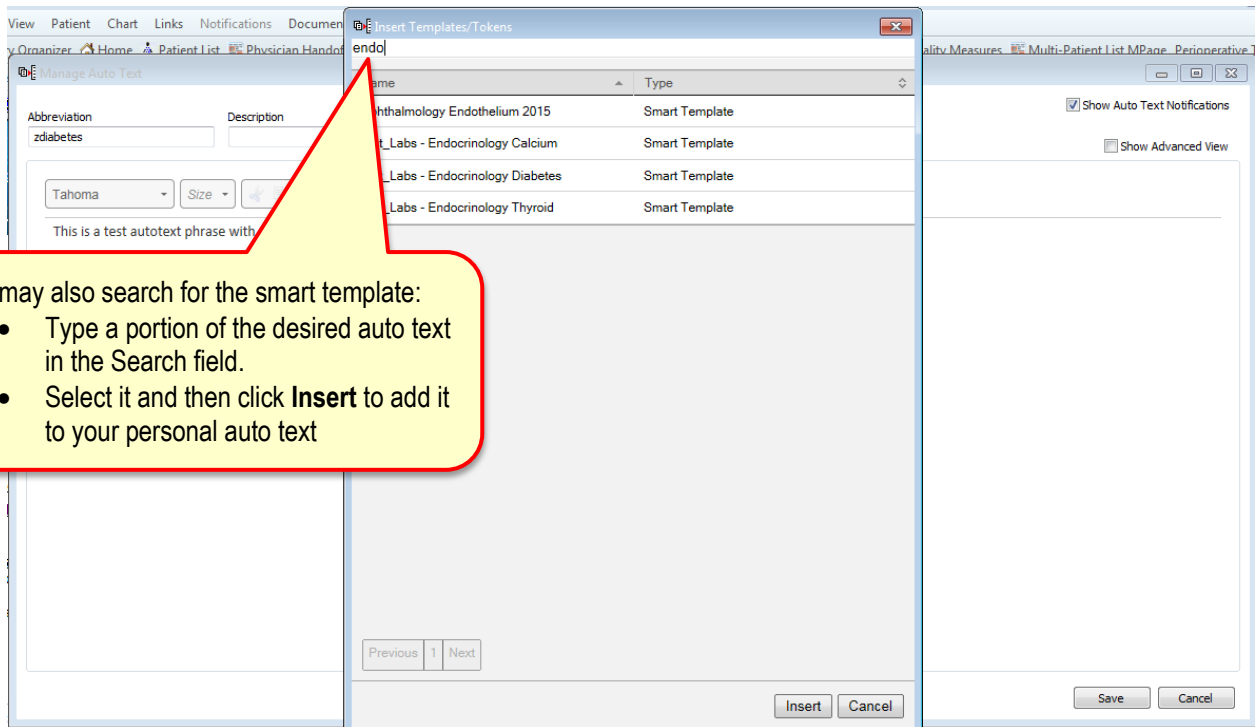
## Deleting an Auto Text Phrase



3. Click **Yes** to confirm the deletion

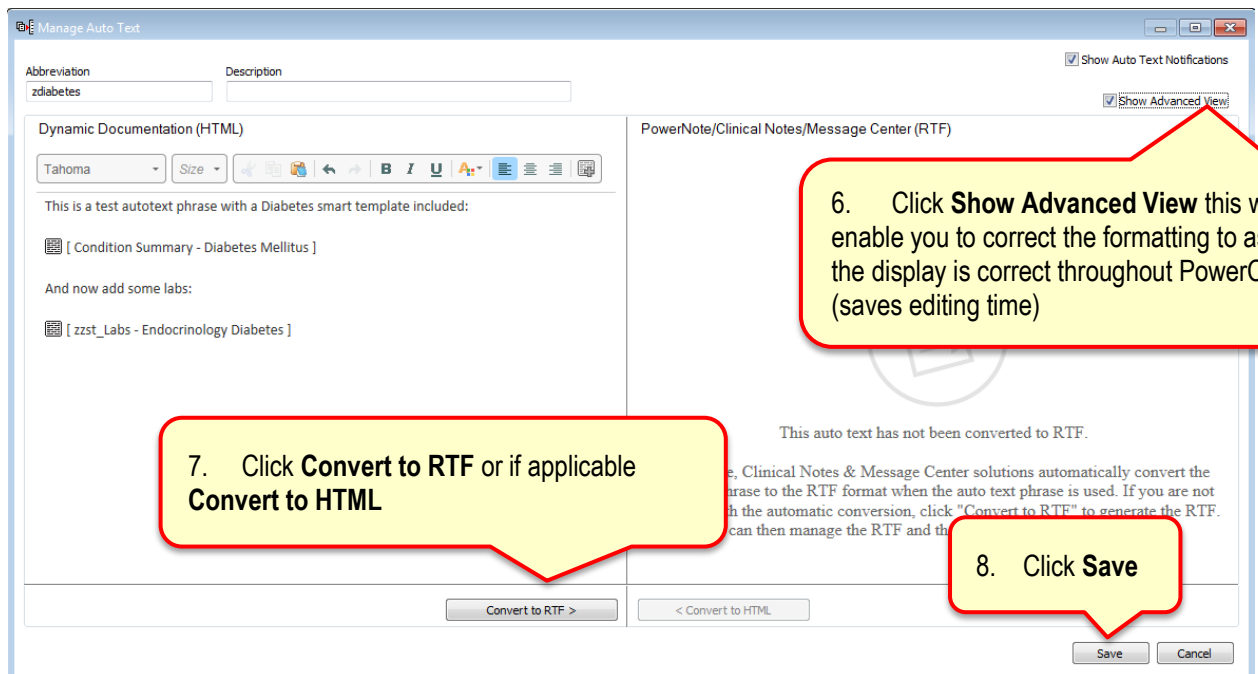
## Creating an Auto Text with a Smart Template





You may also search for the smart template:

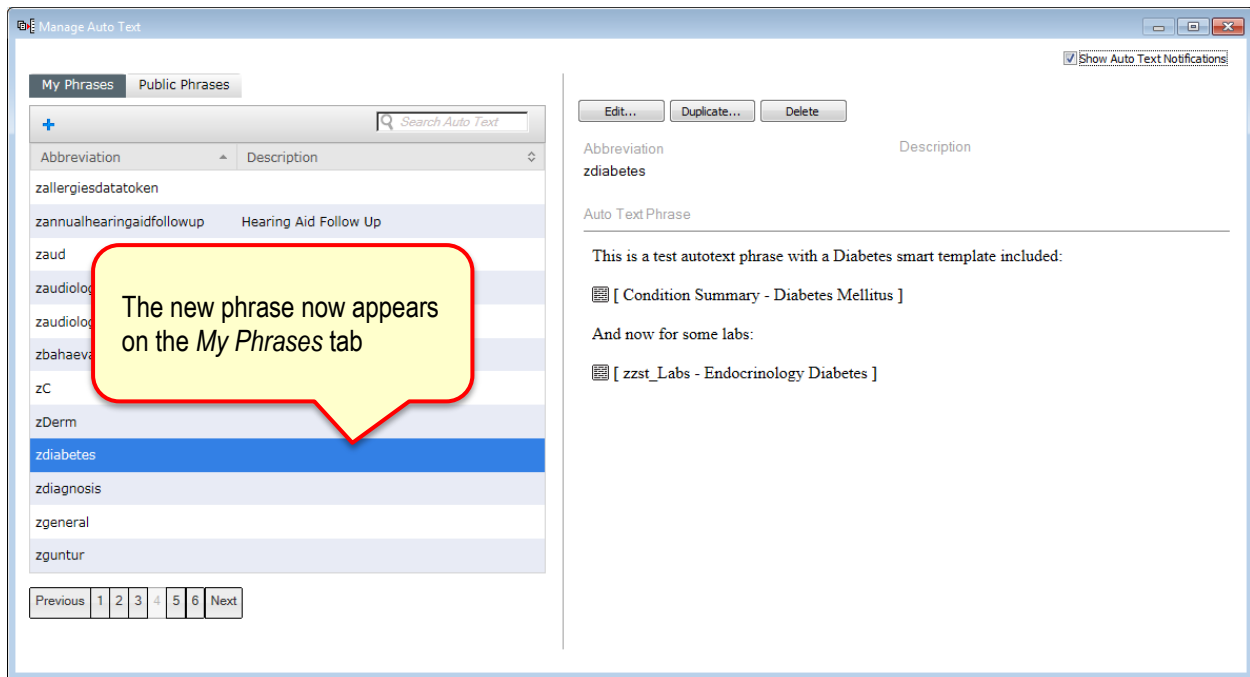
- Type a portion of the desired auto text in the Search field.
- Select it and then click **Insert** to add it to your personal auto text



7. Click **Convert to RTF** or if applicable **Convert to HTML**

6. Click **Show Advanced View** this will enable you to correct the formatting to assure the display is correct throughout PowerChart (saves editing time)

8. Click **Save**



## Inserting Auto Text into a Dynamic Document or PowerNote

Document Viewing

Office Visit Note x List

Tahoma 9

**Chief Complaint**

**History of Present Illness** Insert free text

**Review of Systems**

**Physical Exam**  
Vitals & Measurements  
HT: 177 cm WT: 70 kg BMI: 22

**Assessment/Plan**  
Migraine

**Problem List/Past Medical History**

**Medications**  
No active medications

**Allergies**  
No Known Medication Allergies

**Social History**

**Family History**

1. Click on **Insert free text** next to the section where you want to place the text.

Office Visit Note x List

Tahoma

- ..ophthsoftcontactsRx \*
- ..ophthvisitinfowithros \*
- ..ophthvisualacuity \*
- Chis**
- ..optphysicianrelationship \*
- ..pastmedicalhistory \*
- Hist**
- ..pe \*
- ..phq9 \*
- ..physicianrelationship \*
- Rev**
- ..problemist \*
- ..procedurehistory \*
- Phy**
- ..psa \*
- ..renalpanel \*
- Vit**
- ..ros \*
- H**
- ..tadialysis \*
- ..taentireprocedure \*
- Ass**
- ..tageneral \*
- ..takeyportions \*
- Mig**
- ..tanobill \*
- ..tapprimarycare \*
- ..tinetti \*
- ..ua \*
- ..uamicroscopic \*
- ..vsinpatient \*
- ..vsmostrecent \*
- ..vsoutpatient \*
- Sub**

Note D

0.09, Office Visit Note

2. Type the **abbreviation** you created in order to call up the list of auto texts.

In this example, the auto text abbreviation is **.Sub**. The first character of the abbreviation, in this case a period, opens the list of available auto texts that begin with a period.

3. Double-click on the **name of the auto text** you want to insert into the note. In this example double-click on **.Sub**

Document Viewing

Office Visit Note x List

Tahoma 9

**Chief Complaint**

**History of Present Illness** Type the text you want to automatically insert in your notes.

**Review of Systems**

**Physical Exam**  
Vitals & Measurements  
HT: 177 cm WT: 70 kg BMI: 22

**Assessment/Plan**  
Migraine

**Problem List/Past Medical History**  
Ongoing  
No qualifying data

**Medications**  
No active medications

**Allergies**  
No Known Medication Allergies

**Social History**

**Family History**

**Immunizations**

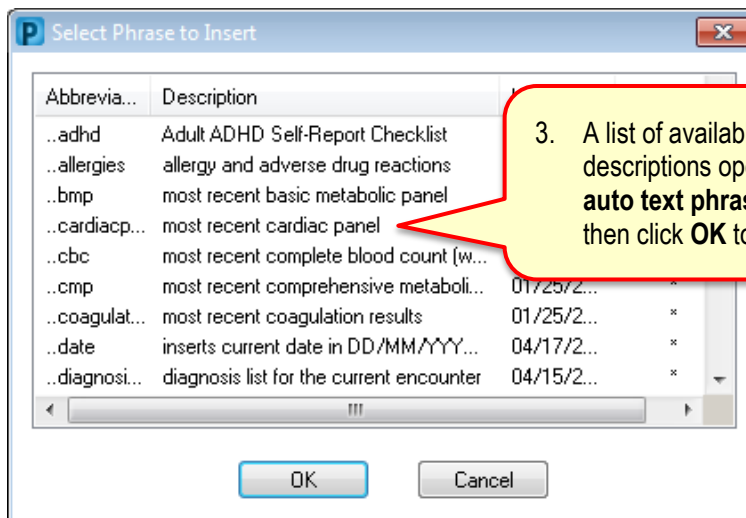
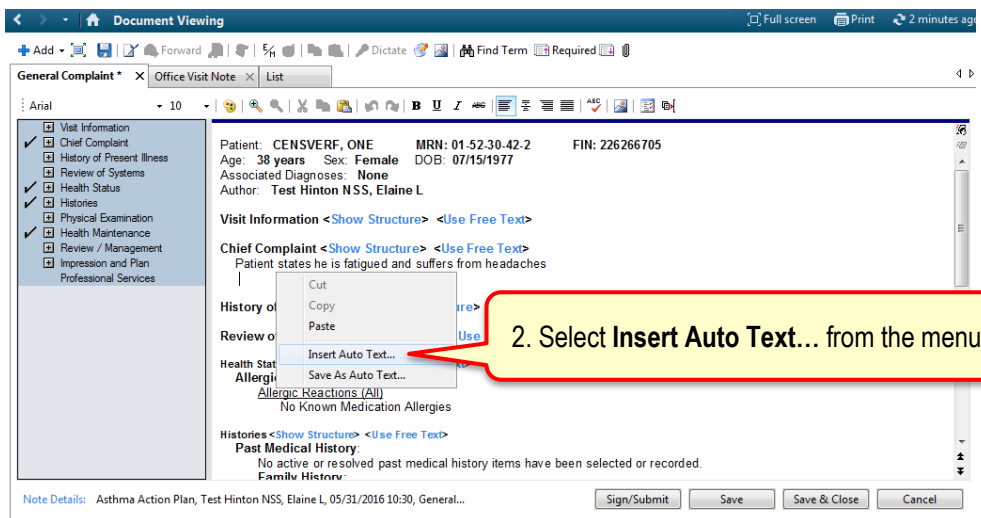
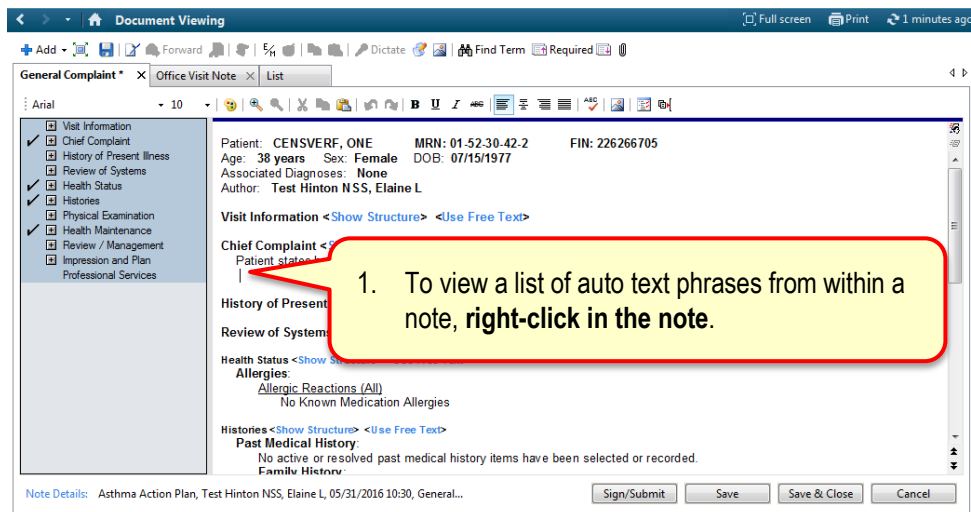
**Health Maintenance**

Note Details: Test Hinton NSS, Elaine L, 05/31/2016 10:09, Office Visit Note

Sign/Submit Save Save & Close Cancel

The auto text appears in the note.

## Viewing a List of Auto Texts Within the Note



## Creating a Drop List

Advance Auto Text allows users to create their own drop lists within their personal auto-texts. Users can choose to default to an actual term or default to an underscore. Drop lists may be used anywhere free text is available, except in PowerNotes.

**History of Present Illness**

Tahoma 9 [Clipboard] [Bold] [Italic] [Underline] [Text Color] [List] [Drop List] [Manage Auto Text]

1. Click on the **Manage Auto Text** tool to create or edit your personal auto texts

**Manage Auto Text**

My Phrases Public Phrases [Search Auto Text] [Edit...] [Duplicate...] [Delete]

2. Click the + to add a new auto-text or click to highlight one already created to edit

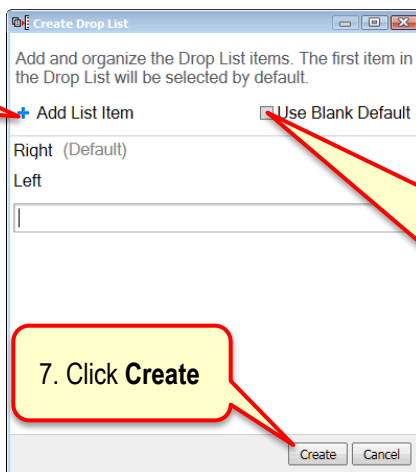
3. Type your auto-text abbreviation and you may add a description if you wish.

4. Type your auto-text in the free text area

5. Click on the **Create Drop List** Icon to add a drop list to your auto-text. You may insert multiple drop lists.

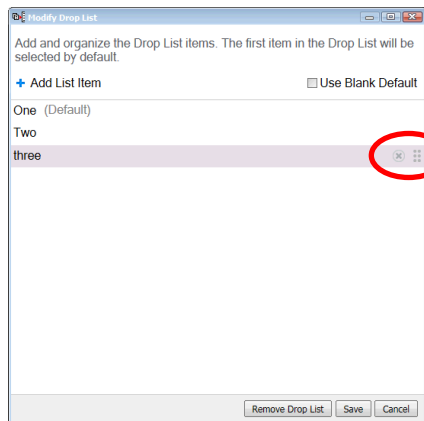
Save Cancel

6. Click + **Add List Item** to add a drop list item. Continue to add list items as needed.

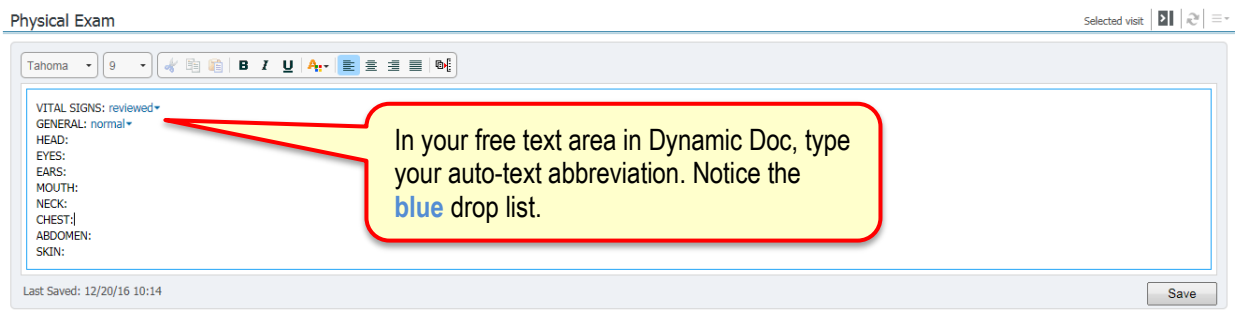


If you wish to use the underscore to be the default for your drop list (for F3 function) click the box next to Use Blank Default. Otherwise, the first list item will be default.

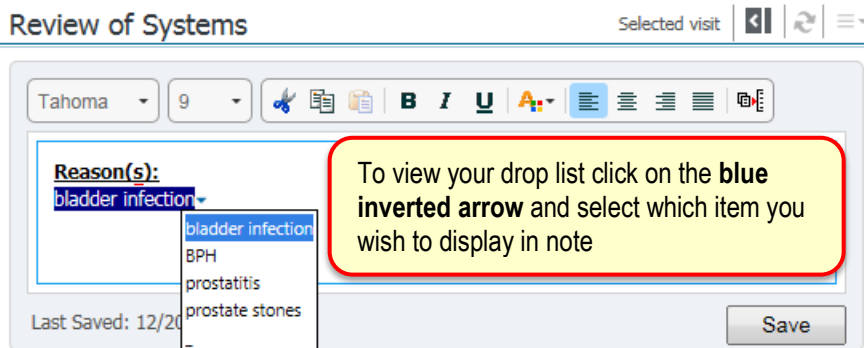
7. Click **Create**



To delete an item from the list, hover over the item and click the X. To rearrange the order of the list, hover over item and 'grab' the dots and drag/drop item to where you would like it in the list. Click Save.



In your free text area in Dynamic Doc, type your auto-text abbreviation. Notice the **blue** drop list.



To view your drop list click on the **blue inverted arrow** and select which item you wish to display in note