

## Tip Sheet

# Creating AutoText with Templates and Drop List


as of 22 Oct 2018

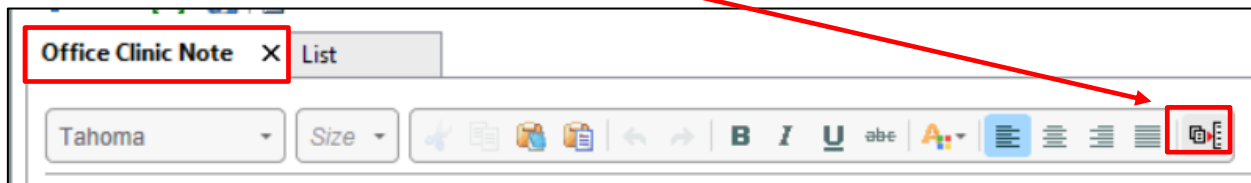
All patient person data used within MHS GENESIS training materials and associated courseware is fictional. Therefore, no protected health information (PHI) or personally identifiable information (PII) is contained within these materials and associated courseware.


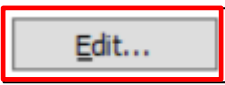
## OVERVIEW

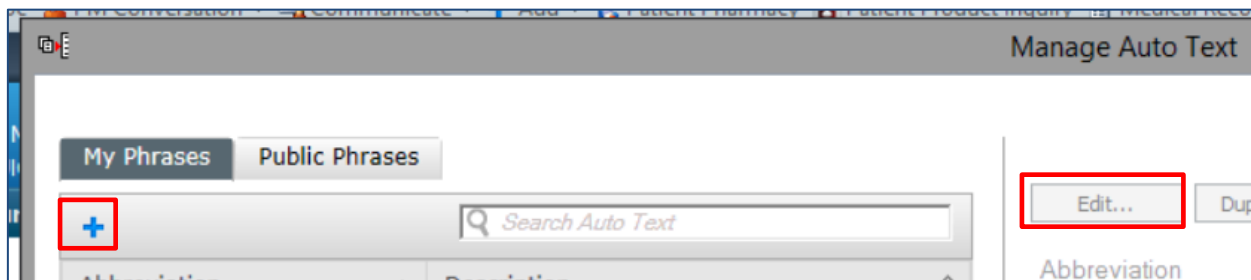
### Creating Auto Text

#### Creating AutoText

1. Access "Manage Auto Text" icon  in your particular Role environment. Access it from S/O-ROS-PE in Provider Workflow or from the Note list.

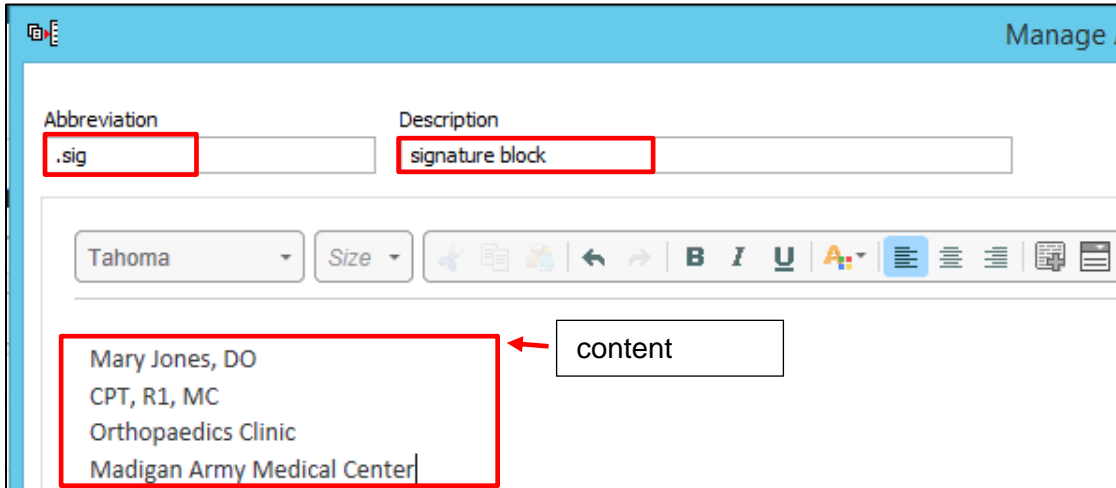


2. Select the  or select a preexisting AutoText and select . Remember that the Default tab is "My Phrases".





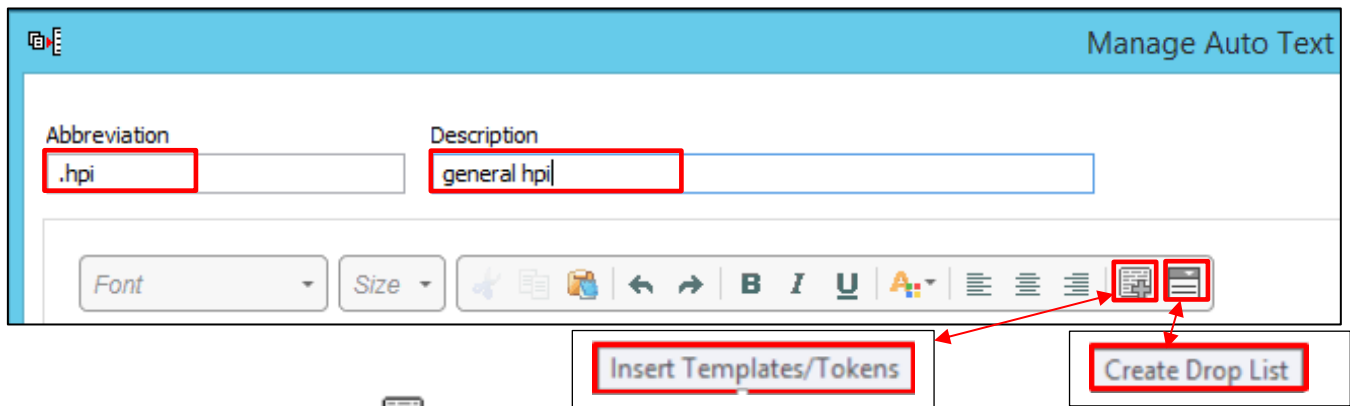
## Creating Auto Text

- Enter an **Abbreviation** for the Auto Text, a **Description**, and the content of the text (example of basic Auto Text).  
Note: Please use the standardized format of ".allsmallletters" for any new Auto Text.




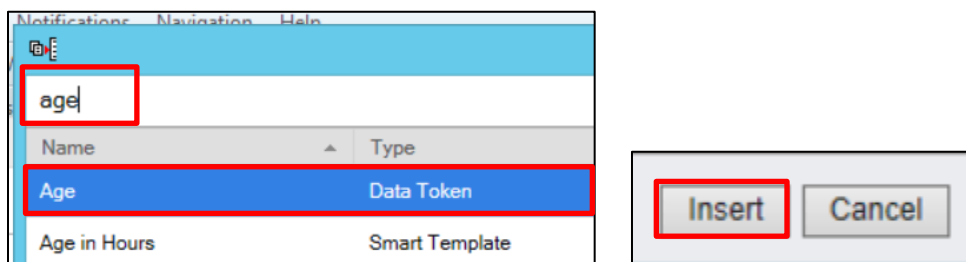
The screenshot shows the 'Manage Auto Text' window. The 'Abbreviation' field contains '.sig' and the 'Description' field contains 'signature block'. Below these fields is a rich text editor with a toolbar. The text area contains the following text: 'Mary Jones, DO', 'CPT, R1, MC', 'Orthopaedics Clinic', and 'Madigan Army Medical Center'. A red box highlights this text, and an arrow points to it with the label 'content'.

- Adding " \_ " underscore for variable fields, create "**Drop List**" for choose lists, and insert "**Templates/Tokens**" to pull from the chart if desired (the underscore allows using F3 to "tab" to the new field)
  - Select the Manage AutoText Icon 
  - Select Add 
  - Enter Abbreviation, Description, and follow below instructions for inserting variable fields, templates/Tokens, and Drop Lists



The screenshot shows the 'Manage Auto Text' window. The 'Abbreviation' field contains '.hpi' and the 'Description' field contains 'general hpi'. Below these fields is a rich text editor with a toolbar. The text area is empty. Two red boxes highlight the 'Insert Templates/Tokens' and 'Create Drop List' buttons in the toolbar. Arrows point from these buttons to labels below the window: 'Insert Templates/Tokens' and 'Create Drop List'.

- Inserting Template Tokens-**
  - select the **Insert Templates/Tokens** icon 
  - search for desired template (i.e.- age) and select it
  - select **Insert**

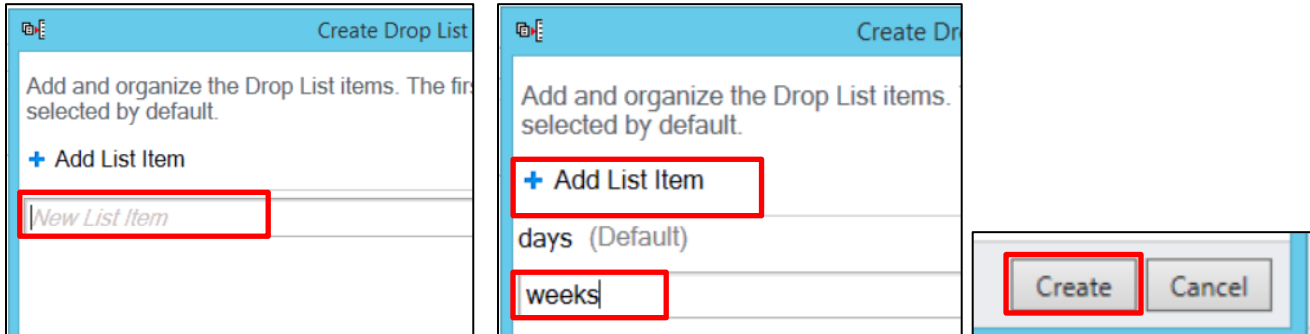


The screenshot shows the 'Insert Templates/Tokens' dialog box. The search field contains 'age'. Below the search field is a table with two columns: 'Name' and 'Type'. The table contains the following rows: 'Age' (Data Token), 'Age in Hours' (Smart Template), and 'Age in Hours' (Smart Template). The 'Age' row is highlighted. To the right of the table is a button labeled 'Insert'.

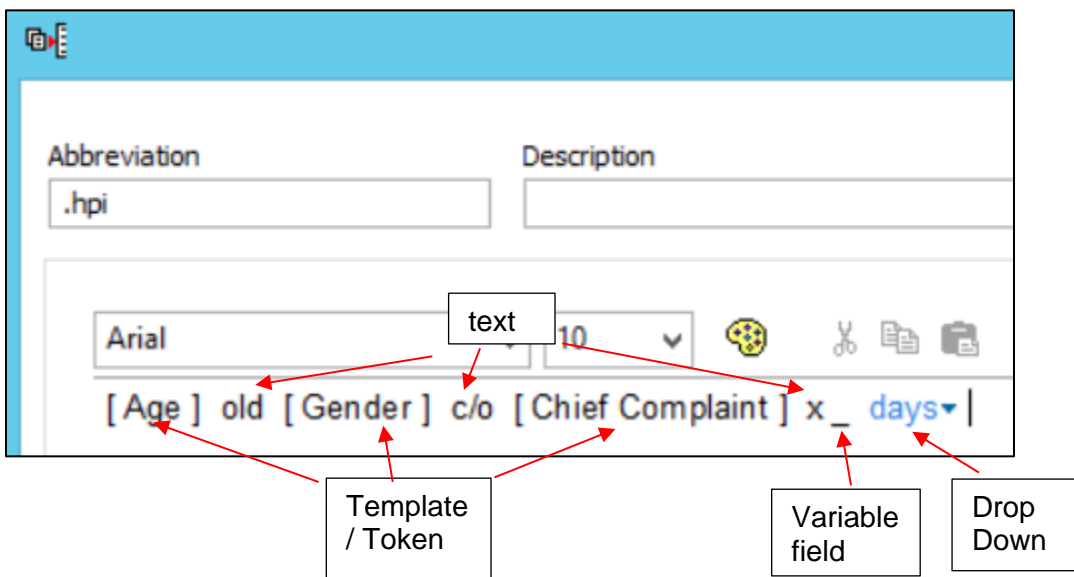
## Creating Auto Text

### 6. Create Drop List-

- Select the **Drop List** icon
- Enter **New List Item**, then select **+ Add List Item** to add more selections
- Select **Create** when finished (whatever you want the Default value to be should be at the top of the list)




### 7. Example of Auto Text with “\_” underscore variable, **Template/Token**, and **Drop List**:



### 8. Move from “\_” underscore to underscore with the Function “F3” key and from Drop List to Drop List with the Function “F9” key



### 9. End Result:

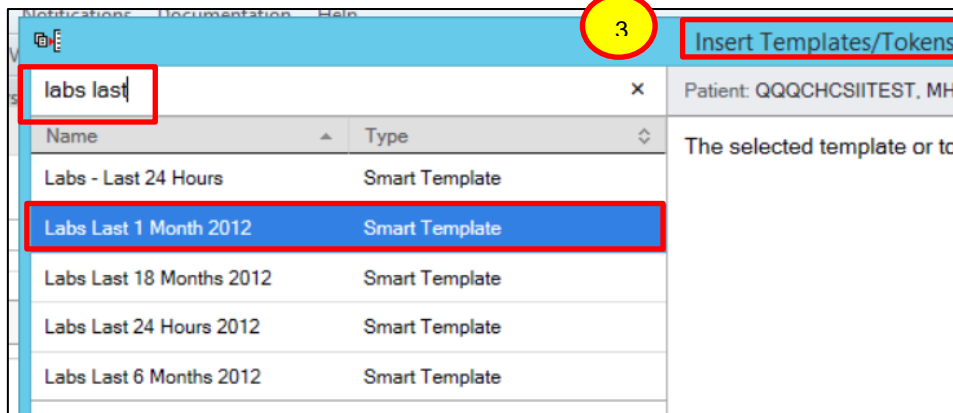


## Creating Auto Text

### Other AutoText template examples

1. Access Auto Text "Insert Templates/Tokens" to see what templates are available to pull from chart. Example- create Auto Text to pull Labs last 1 month

- Create AutoText in **Manage Auto Text** with the 
- Access the **Template/Tokens** with 
- Scroll through available **Template/Tokens** or search for desired
- Select desired Template/Token to **Insert Templates/Tokens**

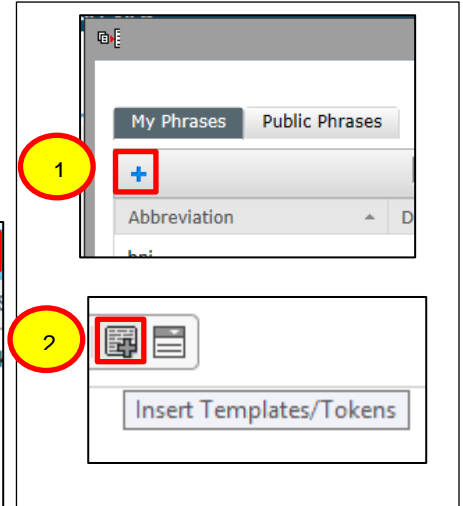


3

labs last

Name	Type
Labs - Last 24 Hours	Smart Template
<b>Labs Last 1 Month 2012</b>	Smart Template
Labs Last 18 Months 2012	Smart Template
Labs Last 24 Hours 2012	Smart Template
Labs Last 6 Months 2012	Smart Template

Insert Templates/Tokens



1

My Phrases Public Phrases

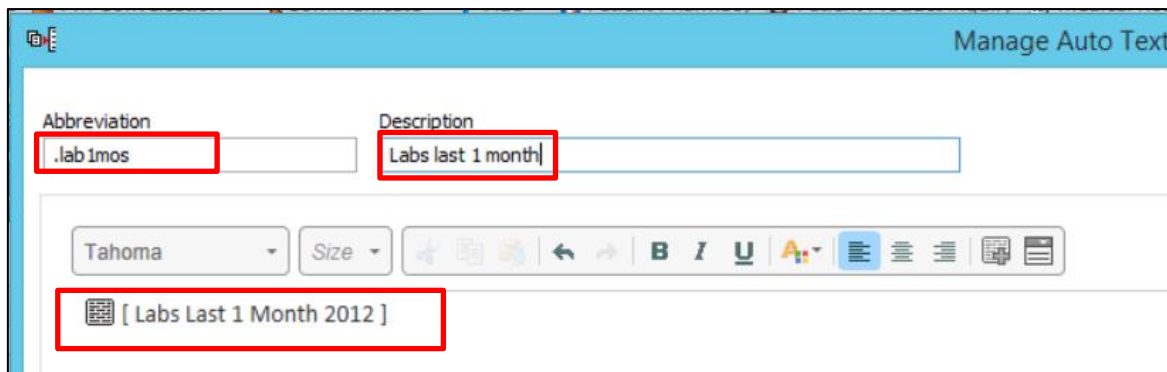
+

Abbreviation

2

Insert Templates/Tokens

2. Create **Abbreviation** and **Description** for the AutoText (Again: please use the ".allsmallletters" convention)



Manage Auto Text

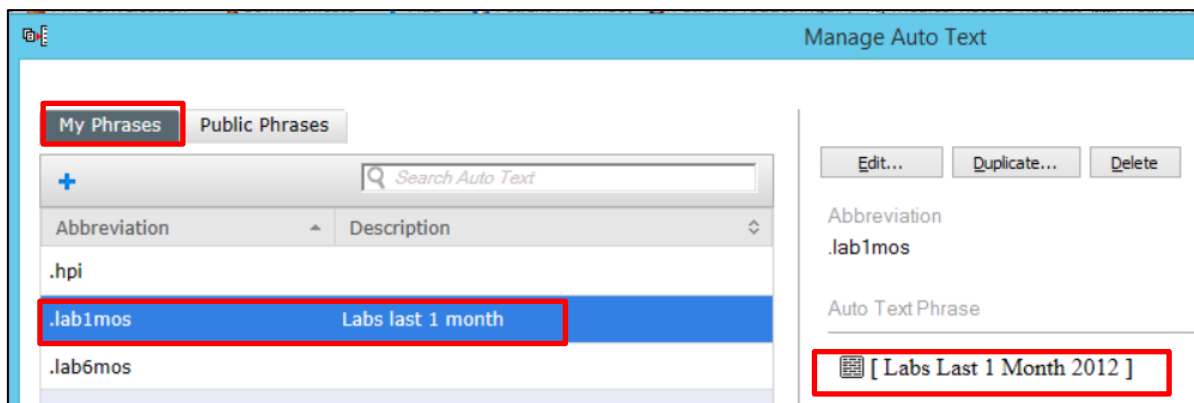
Abbreviation: .lab1mos

Description: Labs last 1 month

Tahoma Size

[ Labs Last 1 Month 2012 ]

3. **Save** the AutoText to your personal list of **My Phrases**



Manage Auto Text

My Phrases Public Phrases

+ Search Auto Text

Abbreviation	Description
.hpi	
<b>.lab1mos</b>	<b>Labs last 1 month</b>
.lab6mos	

Edit... Duplicate... Delete

Abbreviation: .lab1mos

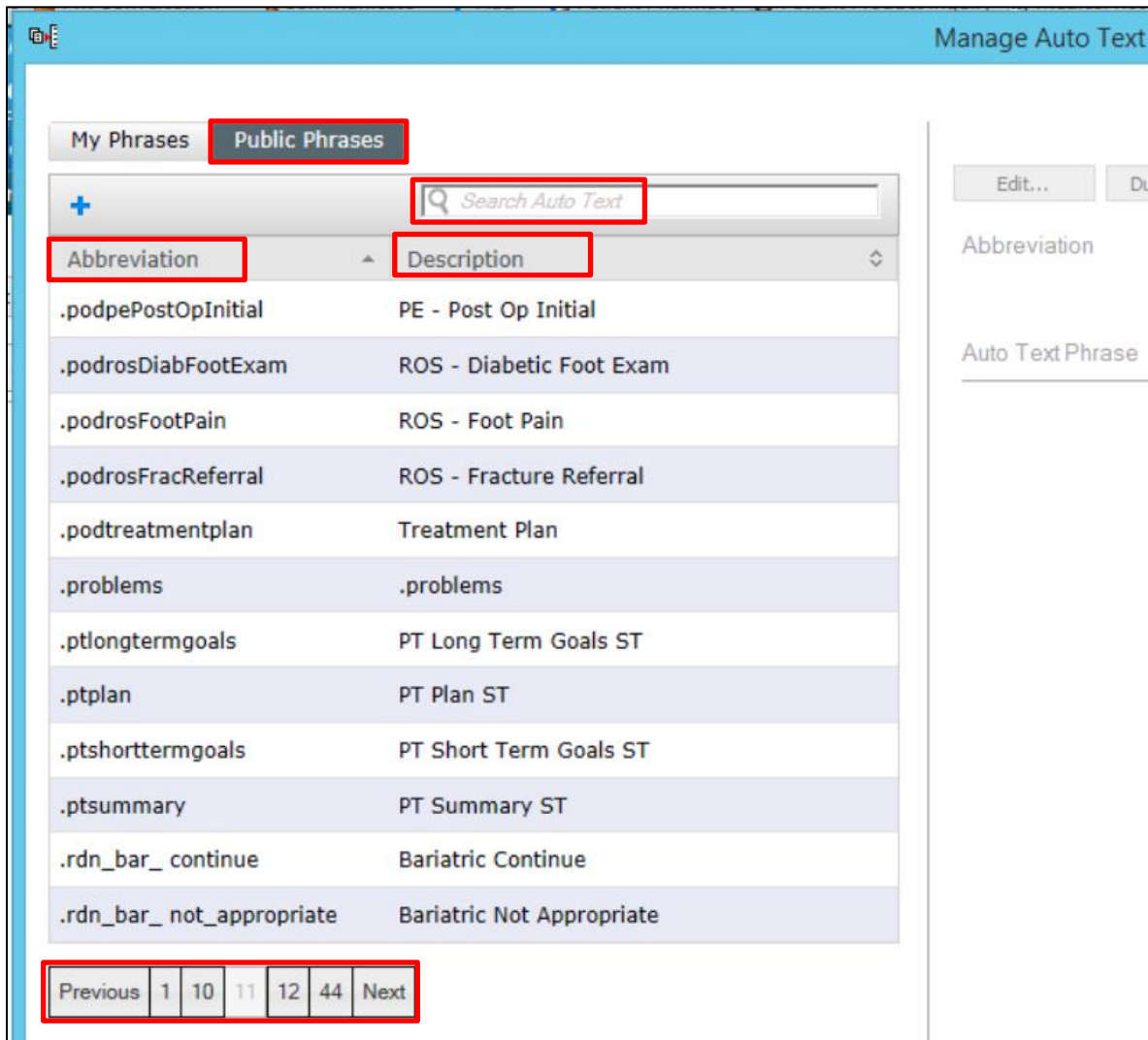
Auto Text Phrase

[ Labs Last 1 Month 2012 ]

## System Auto Text and Smart Phrases

### MHS GENESIS System/Public AutoText and Smart Phrase

1. Preexisting System **Auto Text** exist for use. Some examples:
  - **.ROSCComplete \*** gives a sample complete ROS to personalize
  - **.PEComplete \*** gives a sample complete PE
2. Certain System **Smart Phrases** exist to pull data from the patient chart. Some examples:
  - **\hpiintake \*** pulls the Nurse HPI from the Comprehensive Intake
  - **.vitals \*** pulls in the latest vitals
  - **.ROSAMB \*** pulls in the Nurse ROS from the Comprehensive Intake
3. For a complete list, access **Public Phrases** in Manage Auto Text >> Insert Templates/Tokens



**Manage Auto Text**

My Phrases **Public Phrases**

Abbreviation	Description
.podpePostOpInitial	PE - Post Op Initial
.podrosDiabFootExam	ROS - Diabetic Foot Exam
.podrosFootPain	ROS - Foot Pain
.podrosFracReferral	ROS - Fracture Referral
.podtreatmentplan	Treatment Plan
.problems	.problems
.ptlongtermgoals	PT Long Term Goals ST
.ptplan	PT Plan ST
.ptshorttermgoals	PT Short Term Goals ST
.ptsummary	PT Summary ST
.rdn_bar_ continue	Bariatric Continue
.rdn_bar_ not_appropriate	Bariatric Not Appropriate

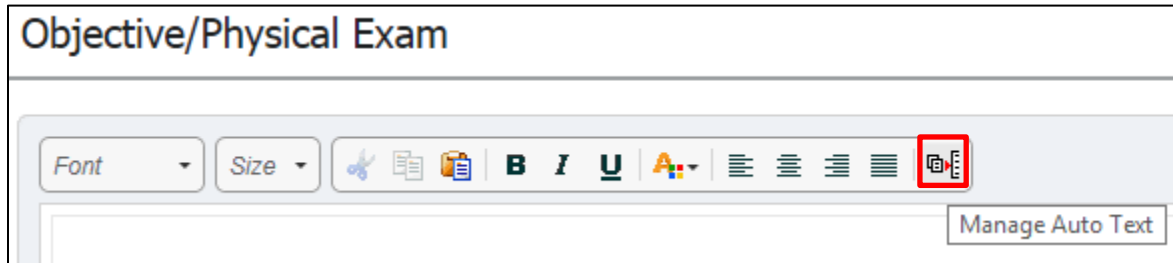
Previous 1 10 11 12 44 Next

## Modifying Public Phrases

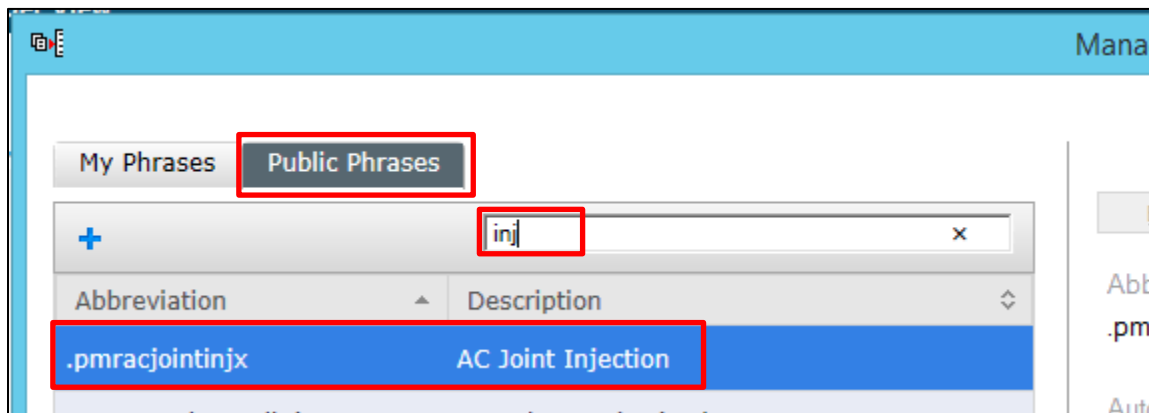
### Modifying "Public Phrases" and saving as personalized "My Phrases" AutoText

#### A. Option A

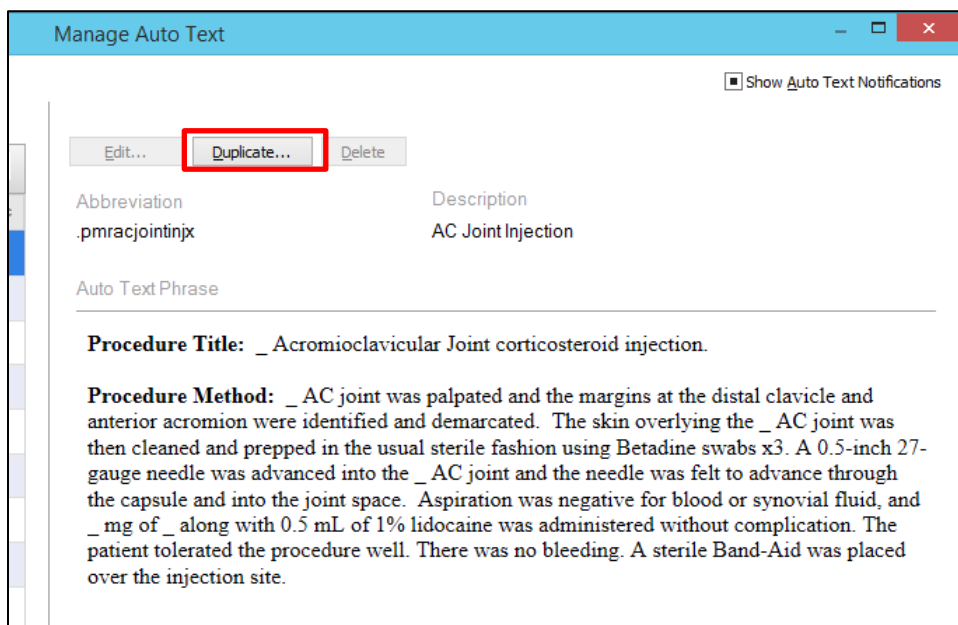
1. Select **Manage AutoText**



2. Select **Public Phrases** (default is **My Phrases**) and search for and select desired **Template/Token**

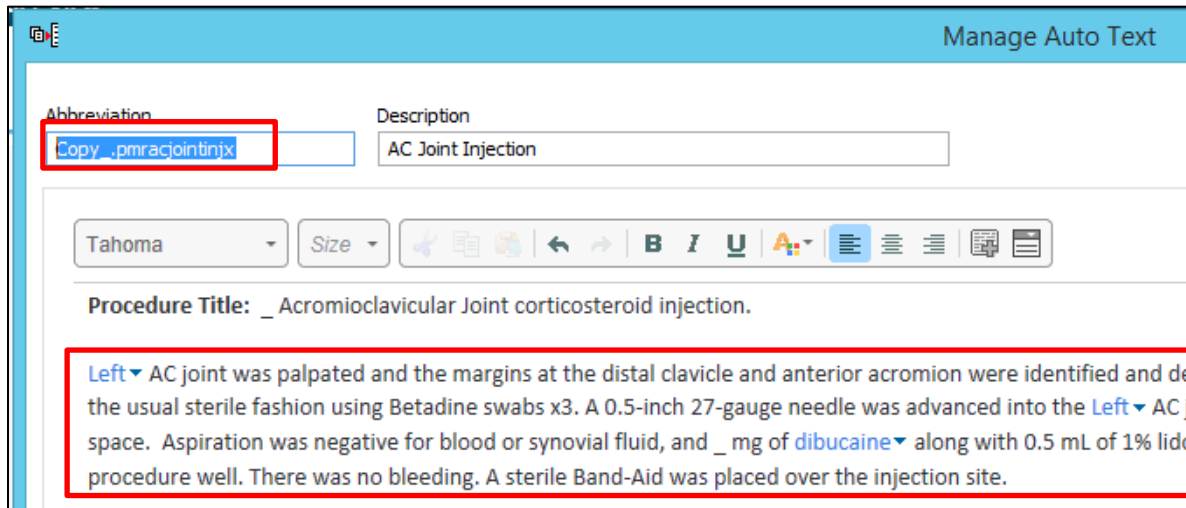


3. Select **Duplicate**



## Modifying Public Phrases

4. Modify content as desired



**Manage Auto Text**

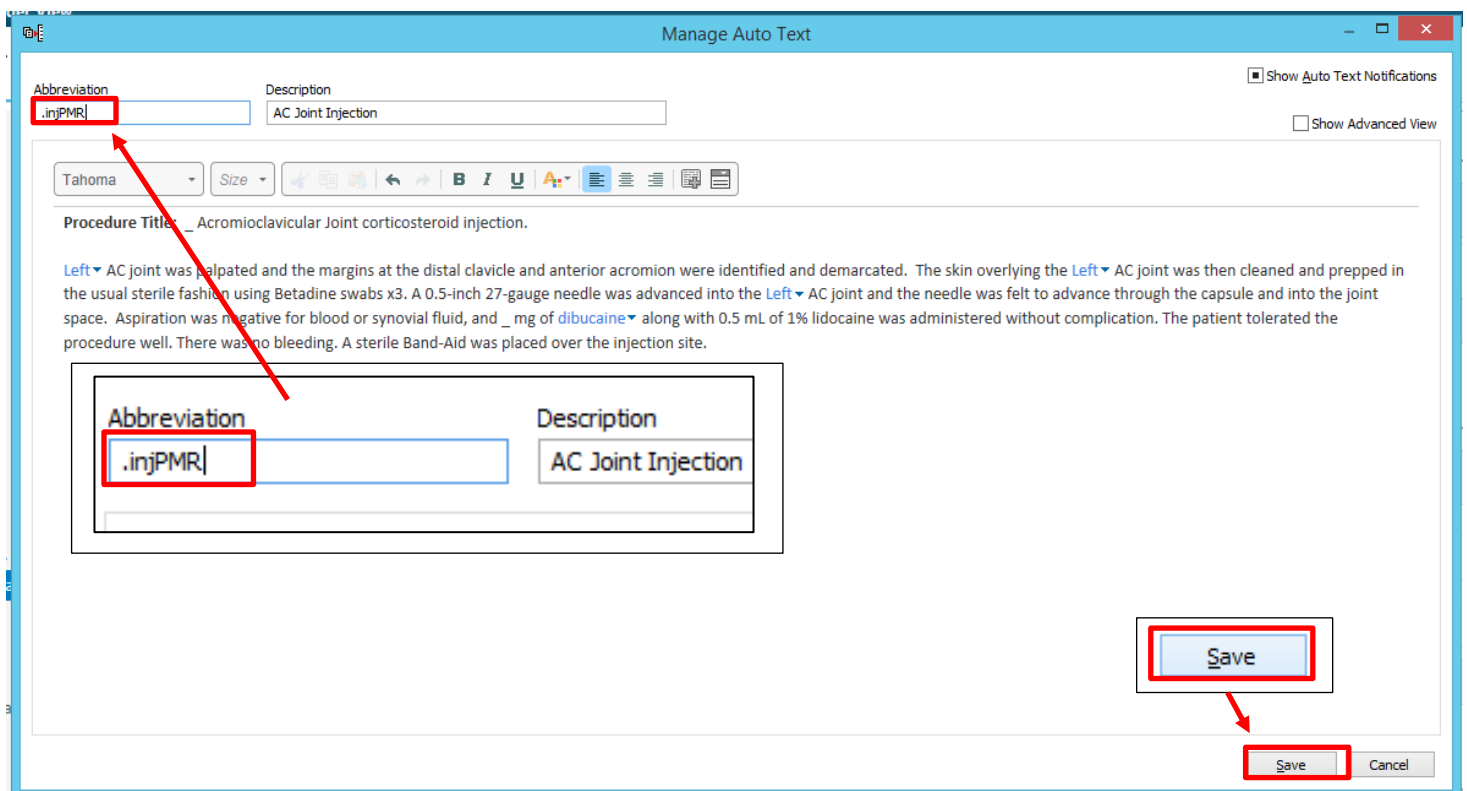
Abbreviation: Copy .pmracjointinjx  
Description: AC Joint Injection

Tahoma Size [Rich Text Editor Icons]

**Procedure Title:** \_ Acromioclavicular Joint corticosteroid injection.

Left ▾ AC joint was palpated and the margins at the distal clavicle and anterior acromion were identified and demarcated. The skin overlying the Left ▾ AC joint was then cleaned and prepped in the usual sterile fashion using Betadine swabs x3. A 0.5-inch 27-gauge needle was advanced into the Left ▾ AC joint and the needle was felt to advance through the capsule and into the joint space. Aspiration was negative for blood or synovial fluid, and \_ mg of dibucaine ▾ along with 0.5 mL of 1% lidocaine was administered without complication. The patient tolerated the procedure well. There was no bleeding. A sterile Band-Aid was placed over the injection site.

5. Save as personal **AutoText** by renaming to desired **Abbreviation** and selecting **Save**



**Manage Auto Text**

Abbreviation: .injPMR  
Description: AC Joint Injection

Tahoma Size [Rich Text Editor Icons]

**Procedure Title:** \_ Acromioclavicular Joint corticosteroid injection.

Left ▾ AC joint was palpated and the margins at the distal clavicle and anterior acromion were identified and demarcated. The skin overlying the Left ▾ AC joint was then cleaned and prepped in the usual sterile fashion using Betadine swabs x3. A 0.5-inch 27-gauge needle was advanced into the Left ▾ AC joint and the needle was felt to advance through the capsule and into the joint space. Aspiration was negative for blood or synovial fluid, and \_ mg of dibucaine ▾ along with 0.5 mL of 1% lidocaine was administered without complication. The patient tolerated the procedure well. There was no bleeding. A sterile Band-Aid was placed over the injection site.

**Save** [Cancel]

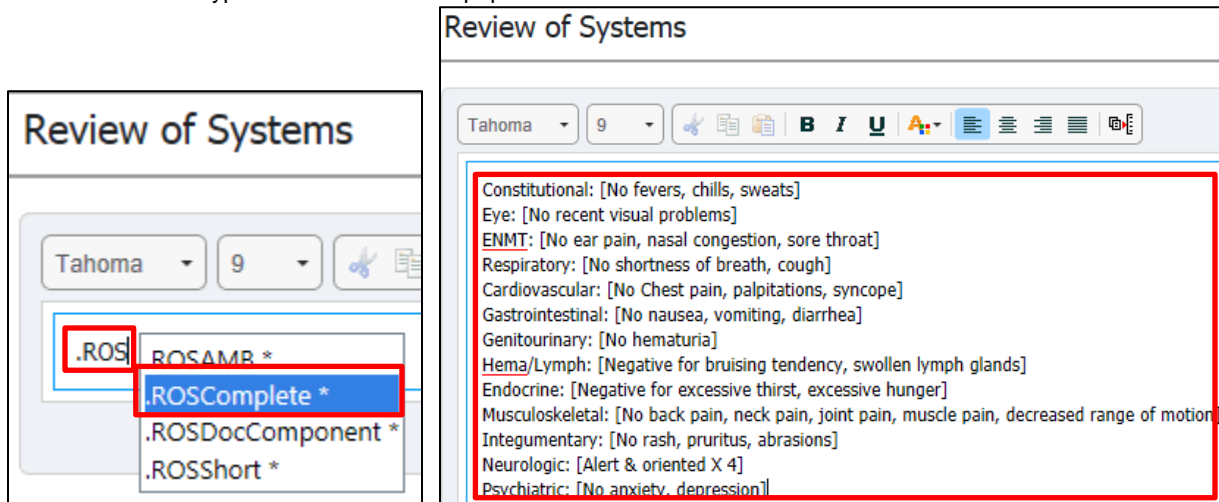


## Modifying Public Phrases

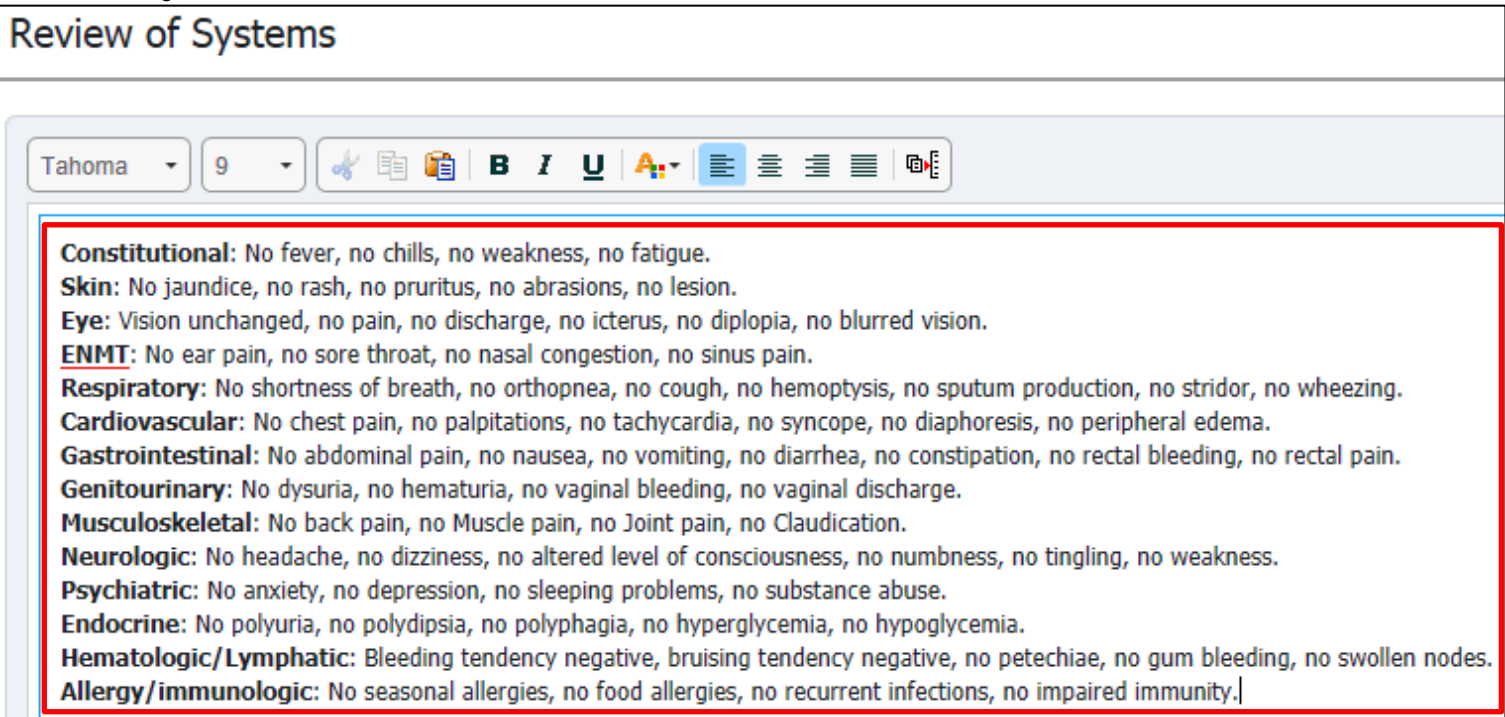
### Modifying "Public Phrases" and saving as personalized "My Phrases" AutoText

#### B. Option B

1. Populate existing system AutoText (**Public Phrases**) into Provider Workflow or into Document
  - Type known **Autotext** to populate field



2. Change format and content as desired





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## Modifying Public Phrases

3. Select text to copy, select **Copy**

**Review of Systems**

Tahoma 9

**Constitutional:** No fever, no chills, no weakness, no fatigue.  
**Skin:** No jaundice, no rash, no pruritus, no abrasions, no lesion.  
**Eye:** Vision unchanged, no pain, no discharge, no icterus, no diplopia, no blurred vision.  
**ENMT:** No ear pain, no sore throat, no nasal congestion, no sinus pain.  
**Respiratory:** No shortness of breath, no orthopnea, no cough, no hemoptysis, no sputum production, no stridor, no wheezing.  
**Cardiovascular:** No chest pain, no palpitations, no tachycardia, no syncope, no diaphoresis, no peripheral edema.  
**Gastrointestinal:** No abdominal pain, no nausea, no vomiting, no diarrhea, no constipation, no rectal bleeding, no rectal pain.  
**Genitourinary:** No dysuria, no hematuria, no vaginal bleeding, no vaginal dryness.  
**Musculoskeletal:** No back pain, no Muscle pain, no Joint pain, no Clonus.  
**Neurologic:** No headache, no dizziness, no altered level of consciousness.  
**Psychiatric:** No anxiety, no depression, no sleeping problems, no substance use.  
**Endocrine:** No polyuria, no polydipsia, no polyphagia, no hyperglycemia, no hypoglycemia.  
**Hematologic/Lymphatic:** Bleeding tendency negative, bruising tendency negative, no petechiae, no gum bleeding, no swollen nodes.  
**Allergy/immunologic:** No seasonal allergies, no food allergies, no recurrent infections, no impaired immunity.

Cut  
Copy  
Paste using source formatting

4. Select the **Manage AutoText** icon

**Review of Systems**

Tahoma 9

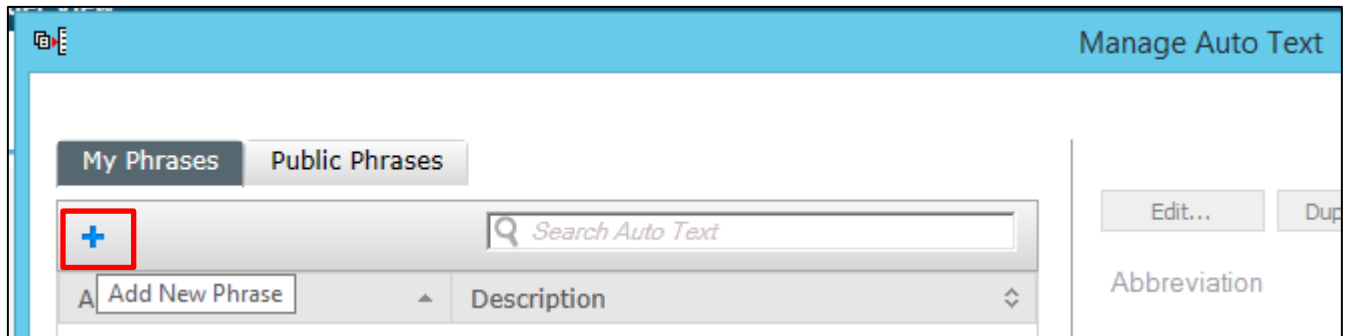
**Constitutional:** No fever, no chills, no weakness, no fatigue.  
**Skin:** No jaundice, no rash, no pruritus, no abrasions, no lesion.

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## Modifying Public Phrases

5. Select **Add New Phrase** 



6. Designate **Abbreviation**, **Description**, add content, **Save**

