

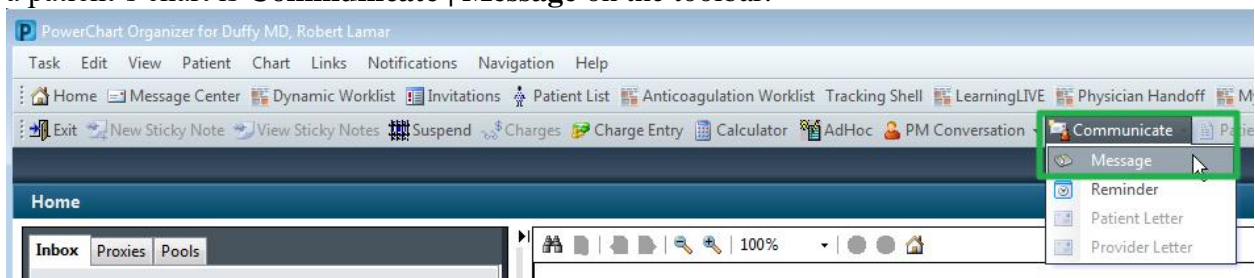
Creating Your Own AutoText in Cerner PowerChart

This guide focuses on AutoText created directly in the Cerner EHR. AutoText can also be created in the Dragon voice transcription program; that is discussed separately in the Dragon lesson.

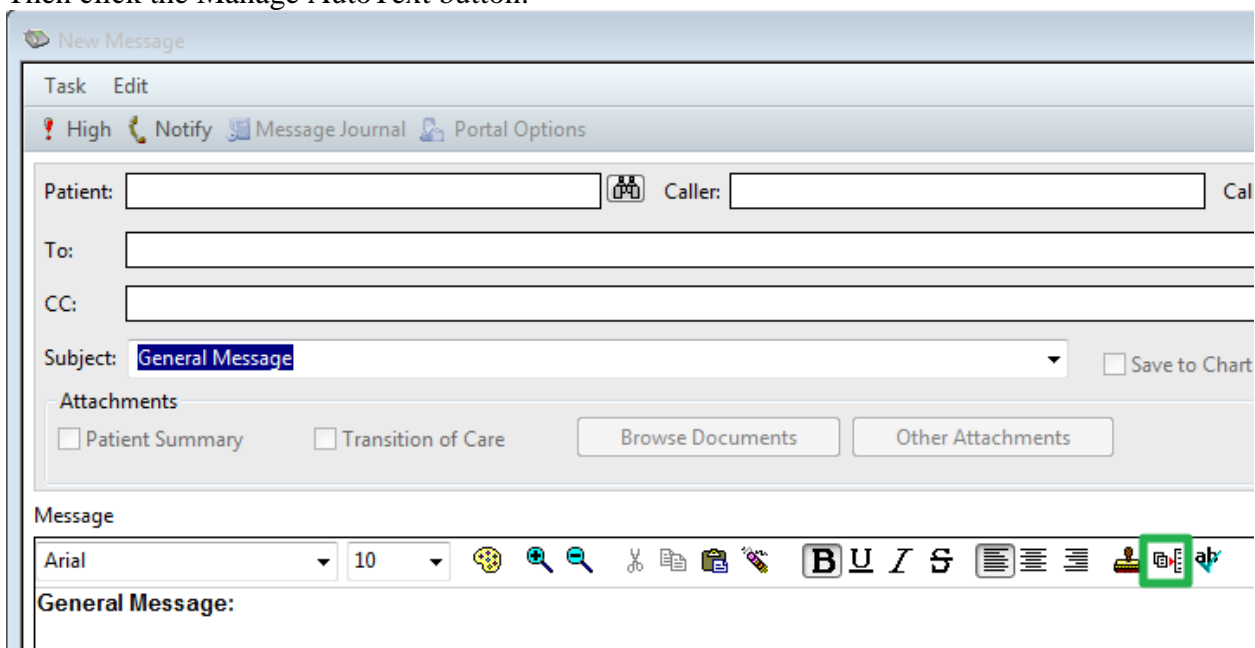
GENERAL FEATURES

AutoText is text you find yourself using repeatedly for common scenarios in your practice. Why type or dictate the same thing dozens of time a week when you can insert it with a shortcut and then make a some minor adjustments? Note that these can be used in DynDocs, PowerNotes, and most any text field where you can type.

To create AutoText, begin with the **Manage AutoText** button, which can be found most anywhere you would manually enter text. One easy spot to find this that doesn't require opening a patient's chart is **Communicate | Message** on the toolbar:

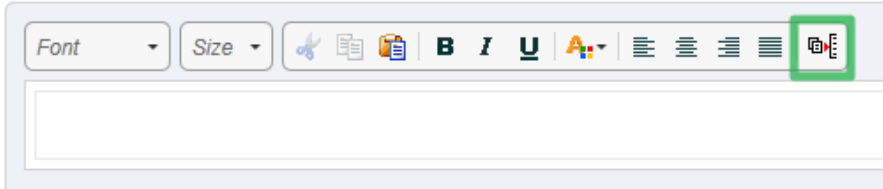


Then click the Manage AutoText button:

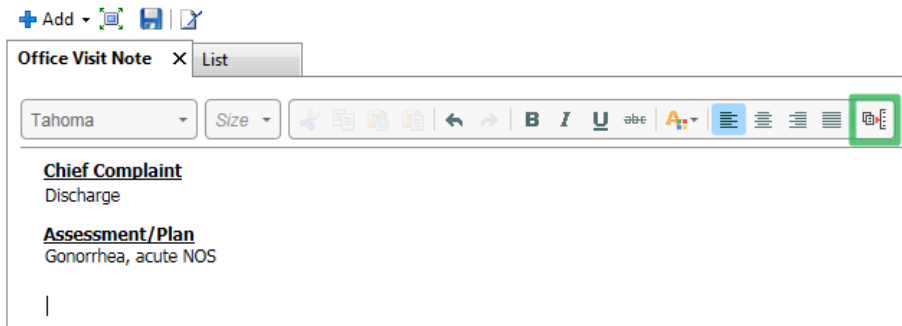


Other examples are text fields on workflow tabs:

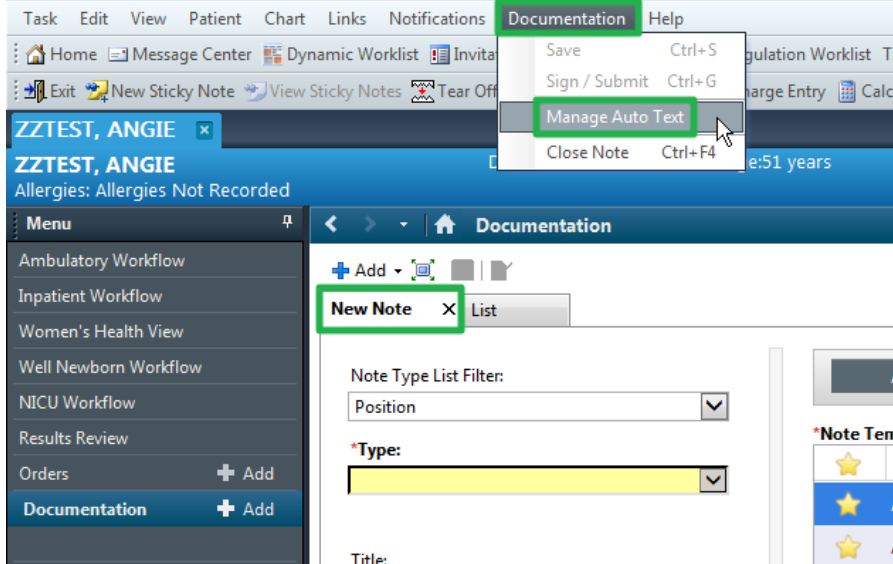
Subjective/History of Present Illness



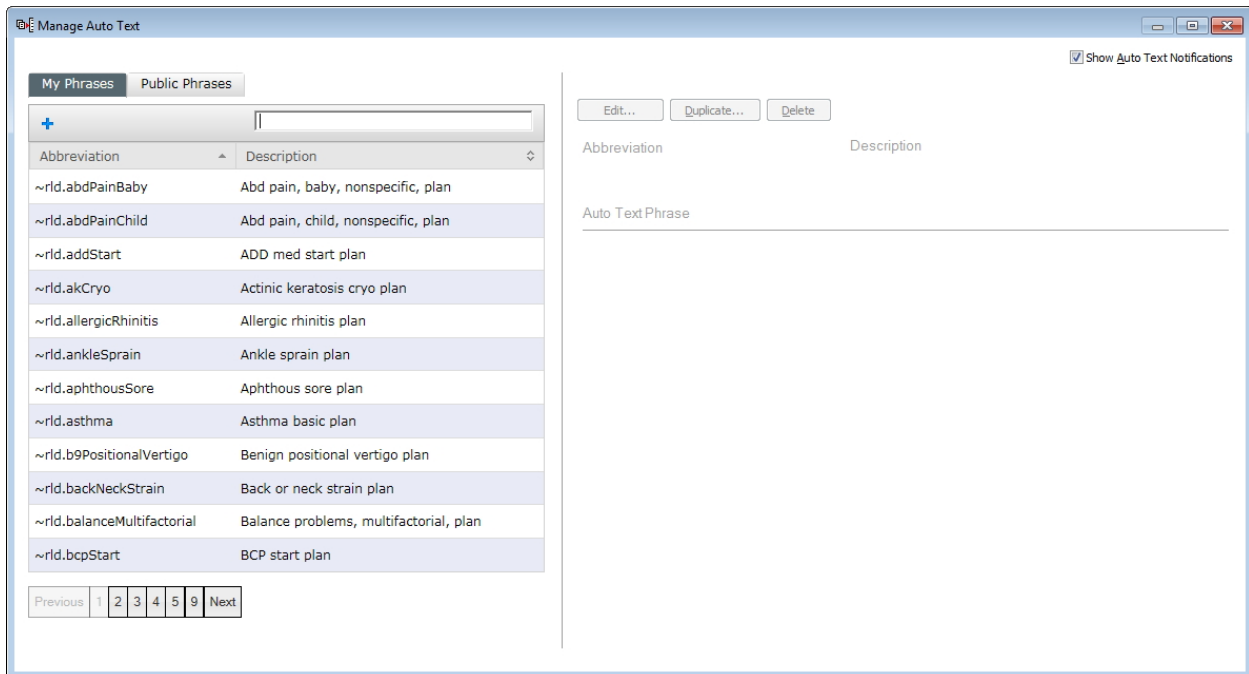
...while directly editing a document:



...or the **Documentation** menu when the **New Note** tab is displaying:

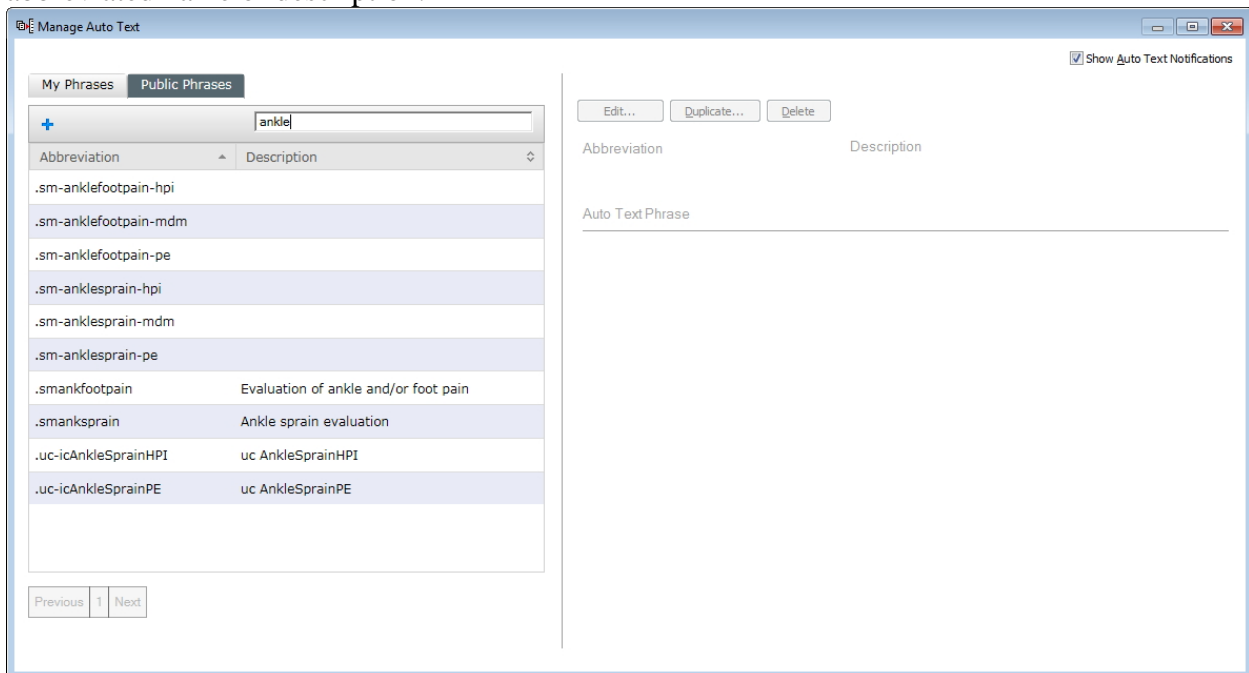


After clicking any of these, this popup appears:



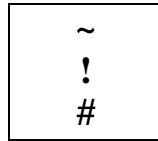
You see a list of AutoTexts on the left. The **My Phrases** tab shows you personal AutoTexts that you've created, while the **Public Phrases** tab shows you those that are available system-wide.

You can search for a topic on either tab. Note that the search engine is pretty versatile. It will find matches that appear at the beginning or in the middle of an item, and whether they are in the abbreviated name or description:



You'll notice that each AutoText has an abbreviation starting with a special character. Each department has its own special character or character combination, allowing a department to create AutoTexts that are easy to find for its users.

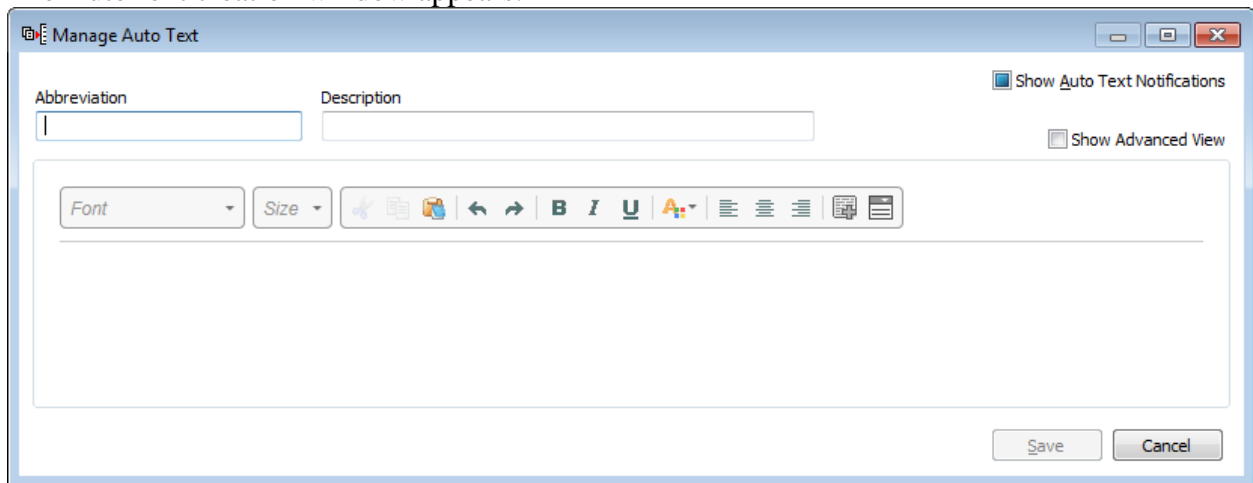
There have also been special characters reserved for individual/personal AutoTexts. These are:



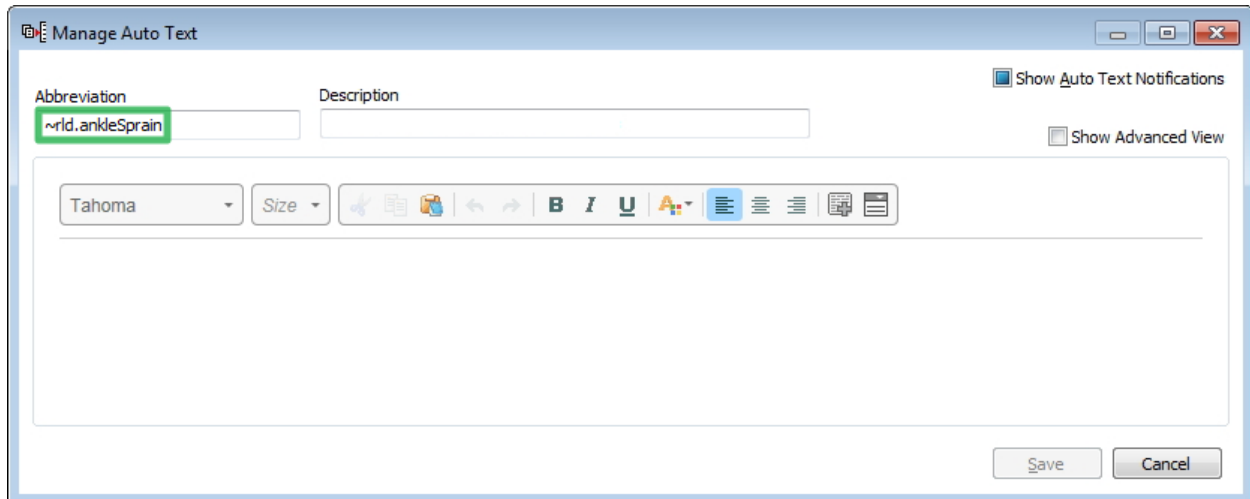
To create a new AutoText, click the + sign at the upper left:



The AutoText creation window appears:

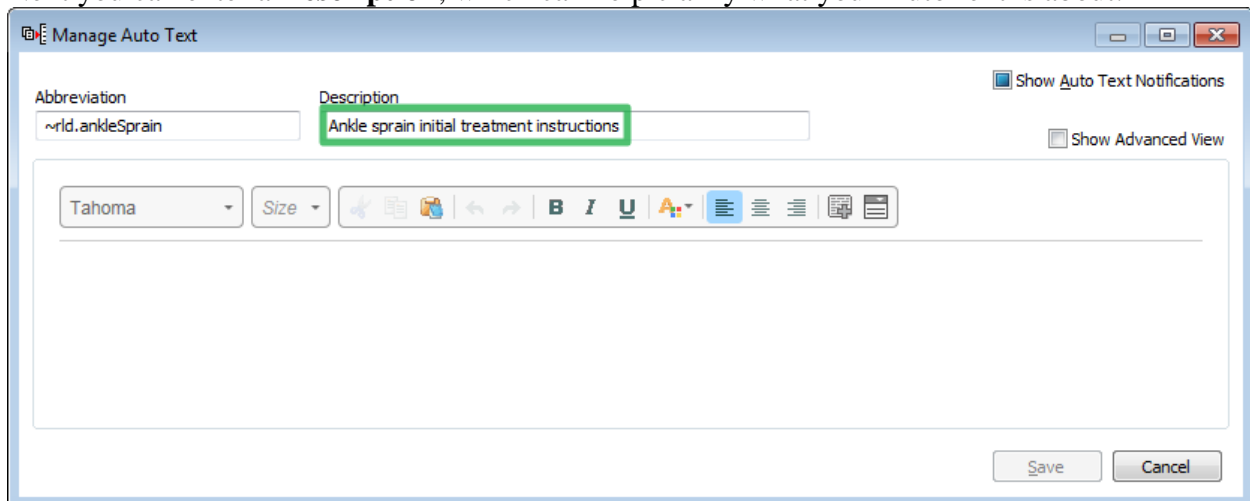


In the **Abbreviation** field, choose an abbreviation for your AutoText. This is the shortcut you'll type to call up your AutoText. Start with one of the three special characters listed above. To keep your AutoTexts organized, you might want to follow that with your initials, then text that reflects the topic:



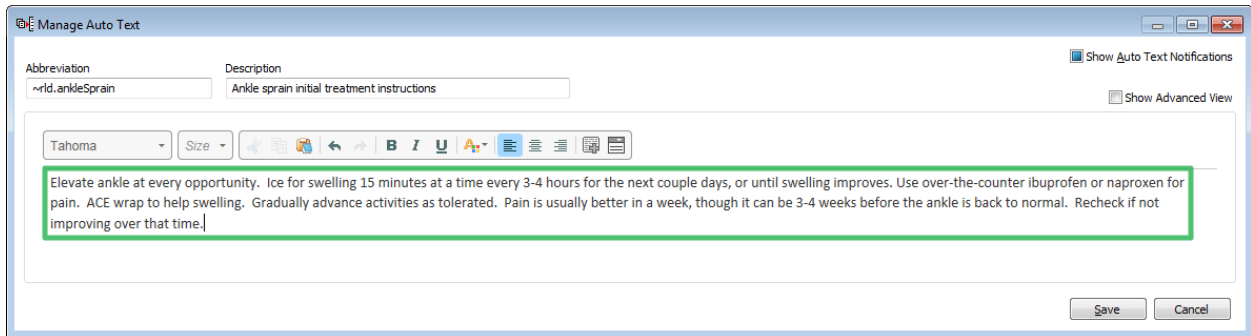
Keep in mind that this area is case-sensitive. If you use capital letters in your AutoText, you'll have to type capital letters to bring up your AutoText, so you may wish to use lower-case letters, at least near the start of the abbreviation, to make it easier to call up your AutoText.

Next you can enter a **Description**, which can help clarify what your AutoText is about:



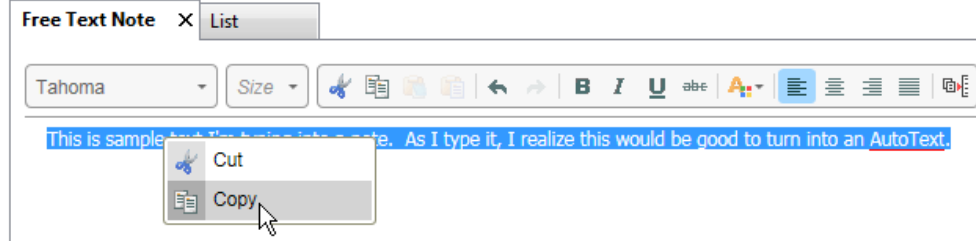
Remember that the search tool looks at this, so use all the key words you think you might wish to search for in the description.

Next, click in the text box and make your entry:



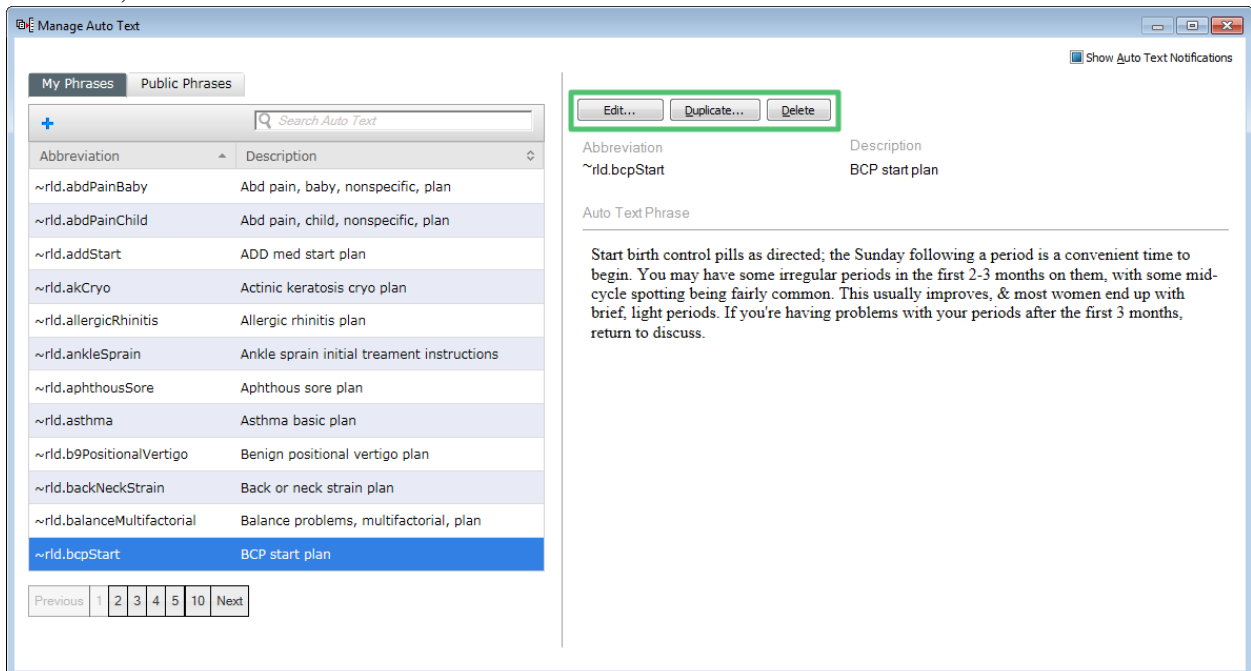
You can format text as desired. Then just click **Save**, and you're done.

You can type your entries, or dictate using Dragon voice transcription. You can also paste them from another source, e.g., if you have such notes saved in a Word document. You can paste them from other places in the EHR as well. As you're performing your documentation, you might realize you'd like to turn it into an AutoText. Just select the text and copy:



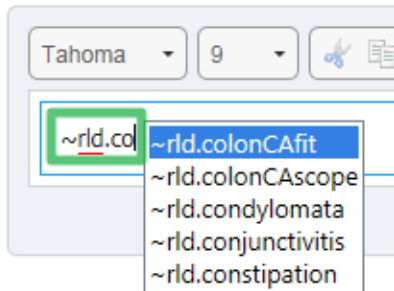
...then open the AutoText manager as above and paste in your text.

After you've created your AutoText, you can further **Edit** it, **Duplicate** it to create a new variation, or **Delete** it:



To use your AutoText in a text field or document, start to type your abbreviation:

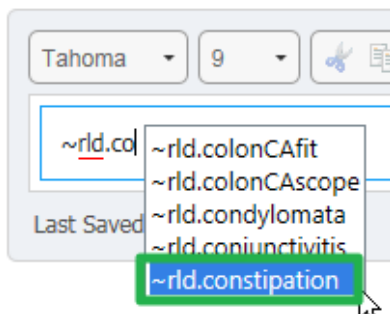
Assessment & Plan



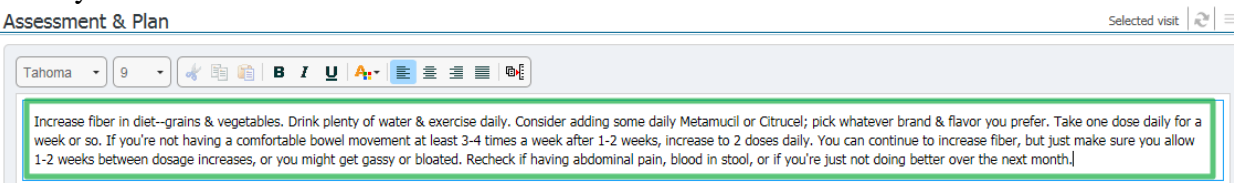
The more you type, the more the list narrows down.

Double-click the desired AutoText:

Assessment & Plan



...and your text is inserted:

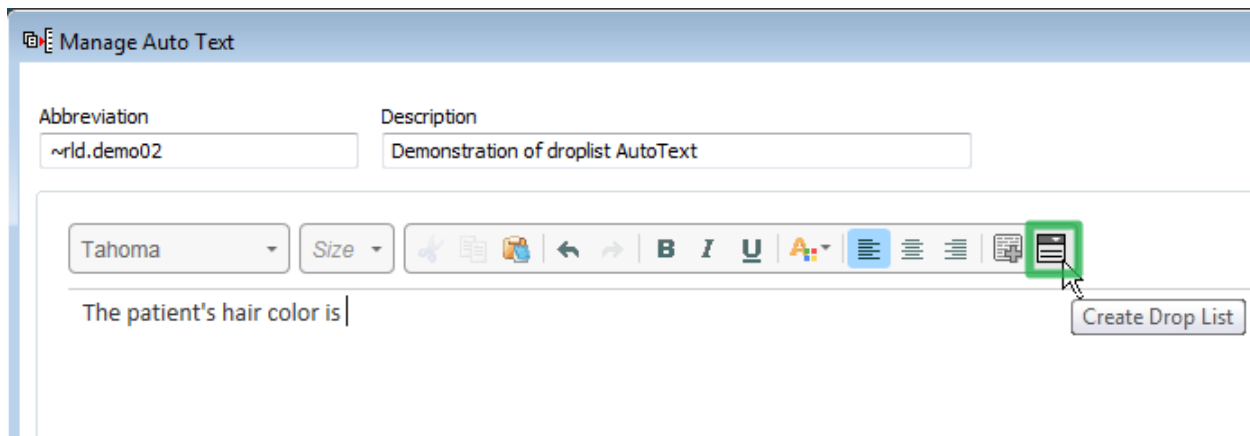


You can type or dictate to further refine is as needed for this particular patient.

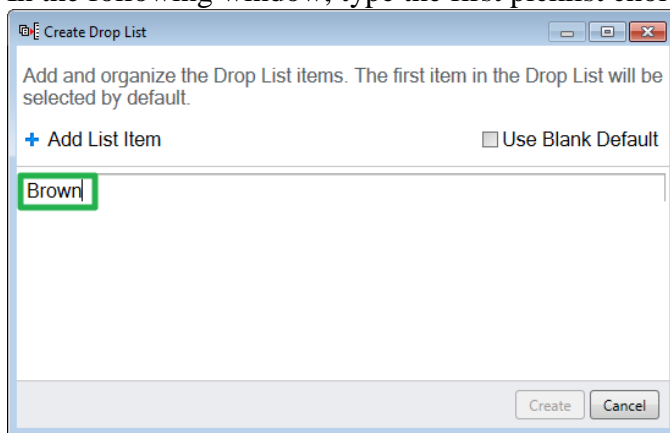
ADDITIONAL FEATURES AND NOTES

Dropdown Lists

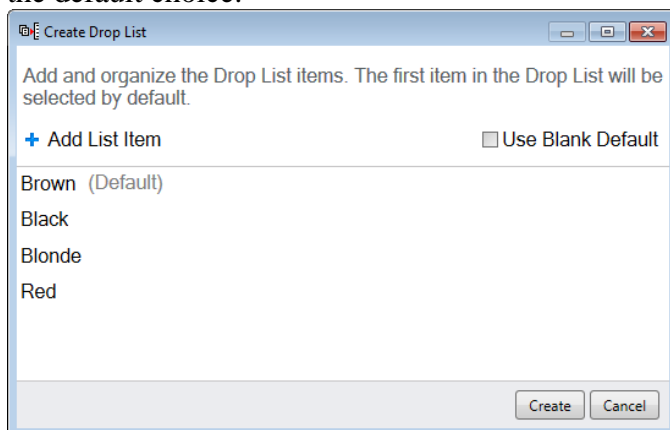
You can incorporate dropdown picklists into your AutoTexts. In this example we'll create a dropdown list for hair color. Type the surrounding text, up to the point where you want the picklist, then click the **Create Drop List** button:



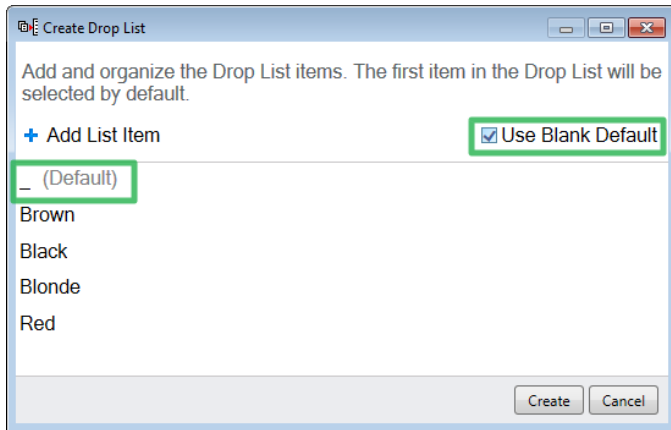
In the following window, type the first picklist choice:



Click + **Add List Item** to add as many additional choices as you like. Note that the first line is the default choice:

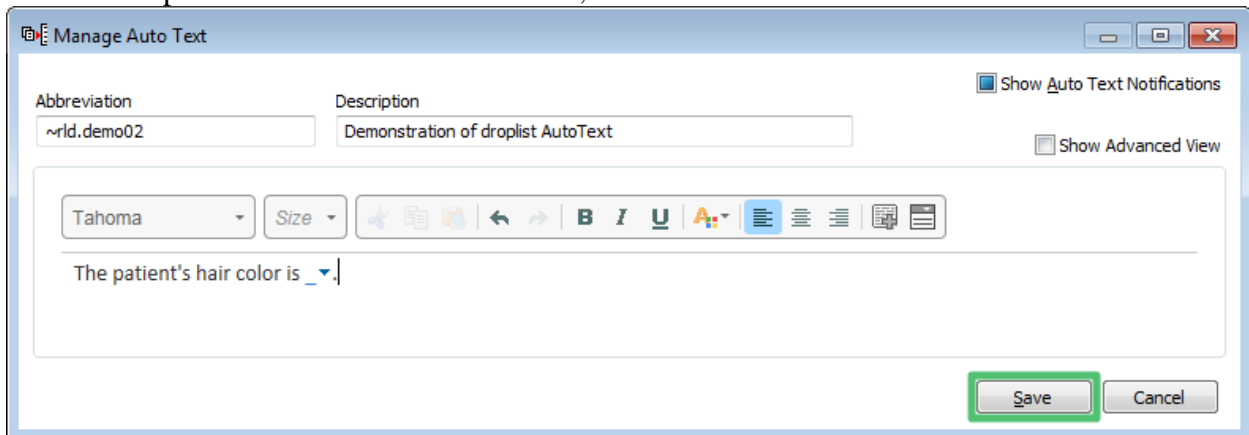


If you would like the default choice at the top to be a blank, click the **Use Blank Default checkbox**:

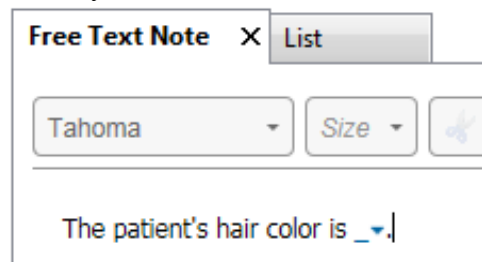


When you're done, click **Create**.

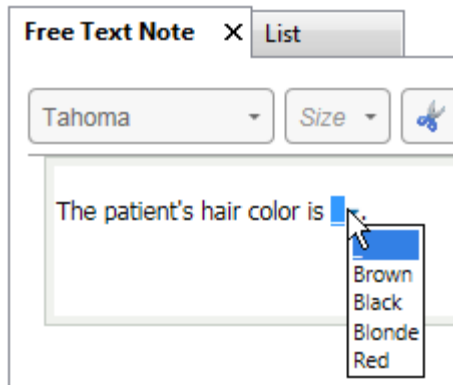
We'll add a period to the end of the sentence, then click **Save** the AutoText:



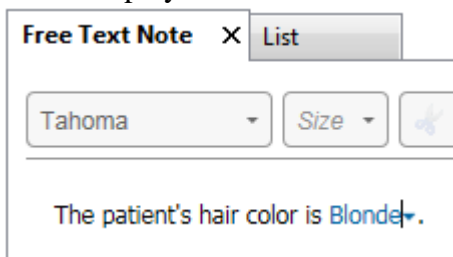
When you use the AutoText in a document, it'll look like this:



Click the dropdown arrow to make your selection:

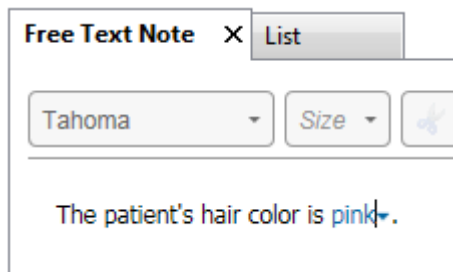


It will display:



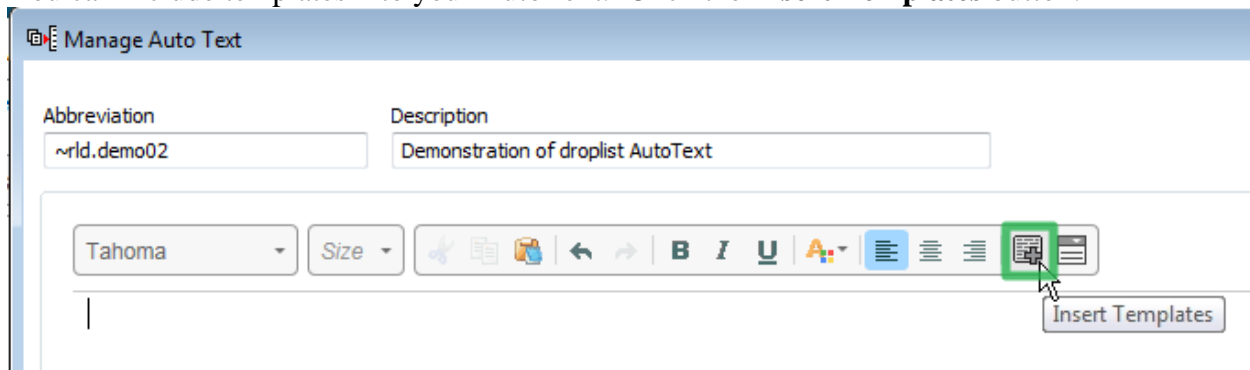
It can be re-selected and changed if necessary.

You can select the blank line to type over it, to add an entry that isn't on the list:

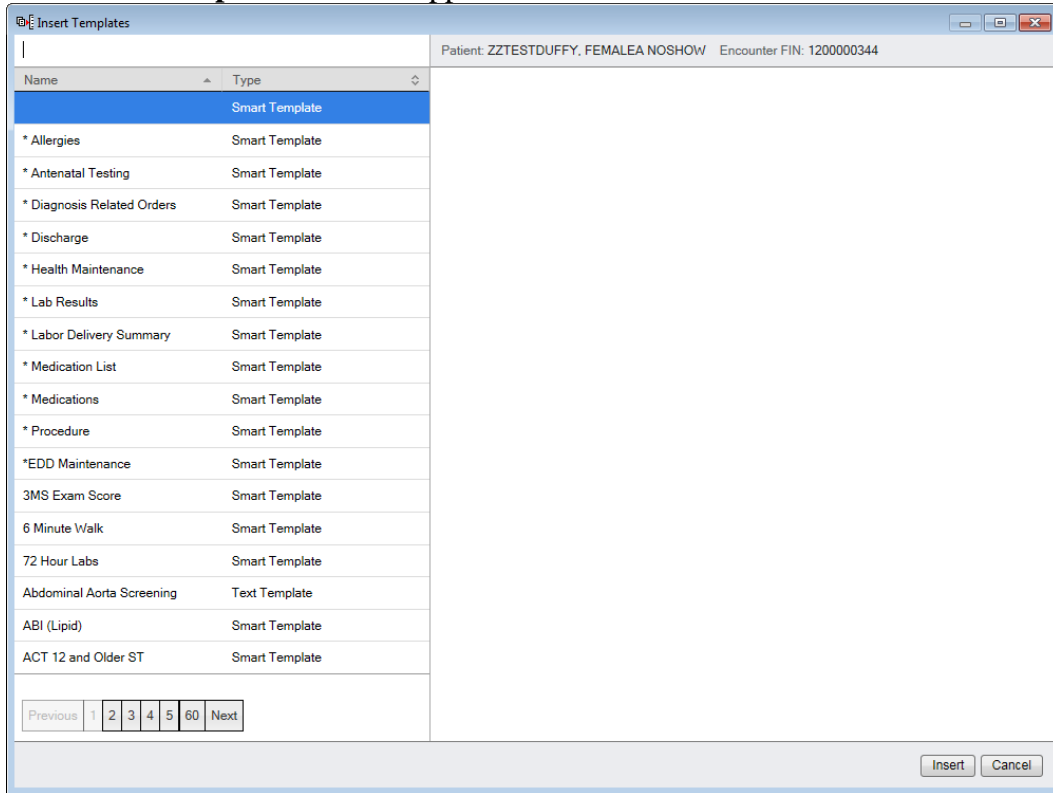


Templates

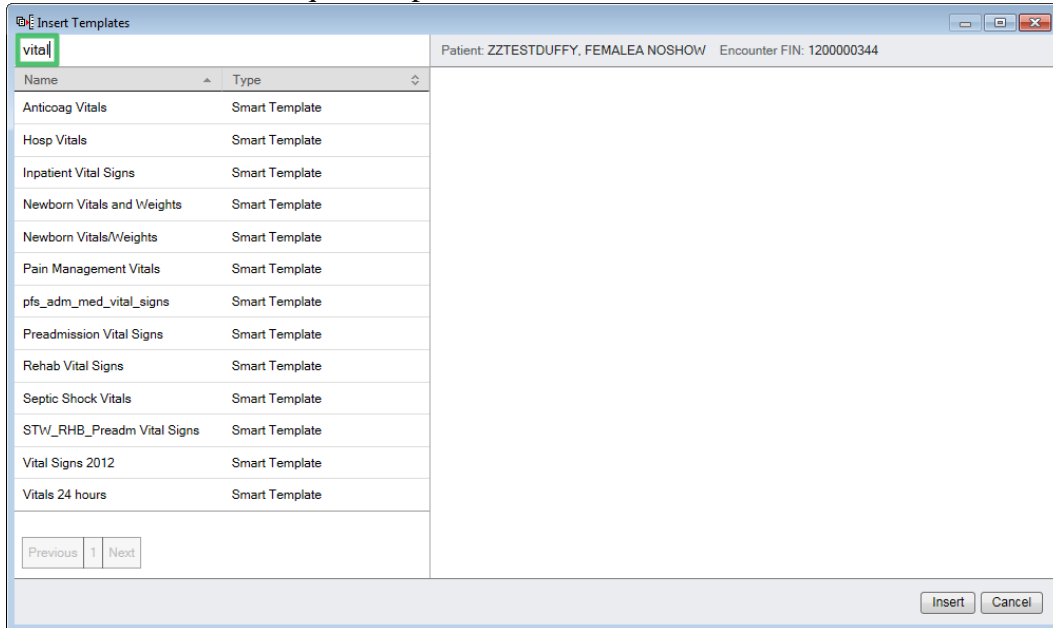
You can include templates into your AutoText. Click the **Insert Templates** button:



The **Insert Templates** window appears:



There are a lot of templates here. Some are better-constructed than others, and you'll often find a few variations of each, so you may want to shop around a little. You can browse, but the search function can be quite helpful:



You'll notice two types of templates. **Smart Templates** are designed to bring in previously charted data items, e.g., the medication list. Clicking on the template will show a preview to the right:

The screenshot shows a software window titled "Insert Templates". At the top right, it displays patient information: "Patient: ZZTESTDUFFY, FEMALEA NOSHOW" and "Encounter FIN: 1200000344".

Name	Type
	Smart Template
* Allergies	Smart Template
* Antenatal Testing	Smart Template
* Diagnosis Related Orders	Smart Template
* Discharge	Smart Template
* Health Maintenance	Smart Template
* Lab Results	Smart Template
* Labor Delivery Summary	Smart Template
* Medication List	Smart Template
* Medications	Smart Template
* Procedure	Smart Template
*EDD Maintenance	Smart Template
3MS Exam Score	Smart Template
6 Minute Walk	Smart Template
72 Hour Labs	Smart Template
Abdominal Aorta Screening	Text Template
ABI (Lipid)	Smart Template
ACT 12 and Older ST	Smart Template

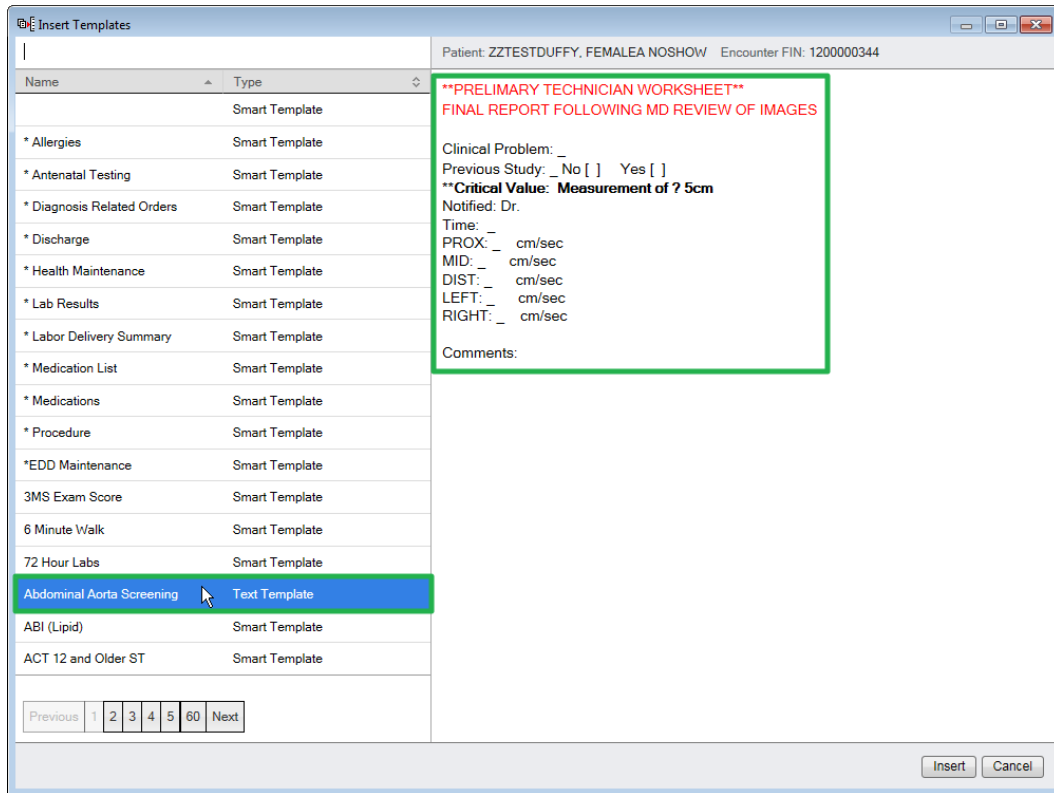
Below the table is a pagination control: "Previous 1 2 3 4 5 60 Next".

At the bottom right of the window are "Insert" and "Cancel" buttons.

The preview area on the right shows the content of the "Medication List" template:

Medication List
Active Medications
Prescribed
cetirizine: 1 cap, Oral, Daily, PRN: as needed for allergy symptoms, 30 cap, 11 Refill(s).
Documented
fluticasone nasal: 2 sprays each nostril daily for 1 wk, then 1 spray each nostril, for nasal allergies., 1 EA, 11 Refill(s).
Medications Inactivated in the Last 72 Hours
No medications found.

Text Templates bring in boilerplate text, perhaps to present a fill-in-the-blank opportunity, as seen on the Abdominal Aorta Screening template:

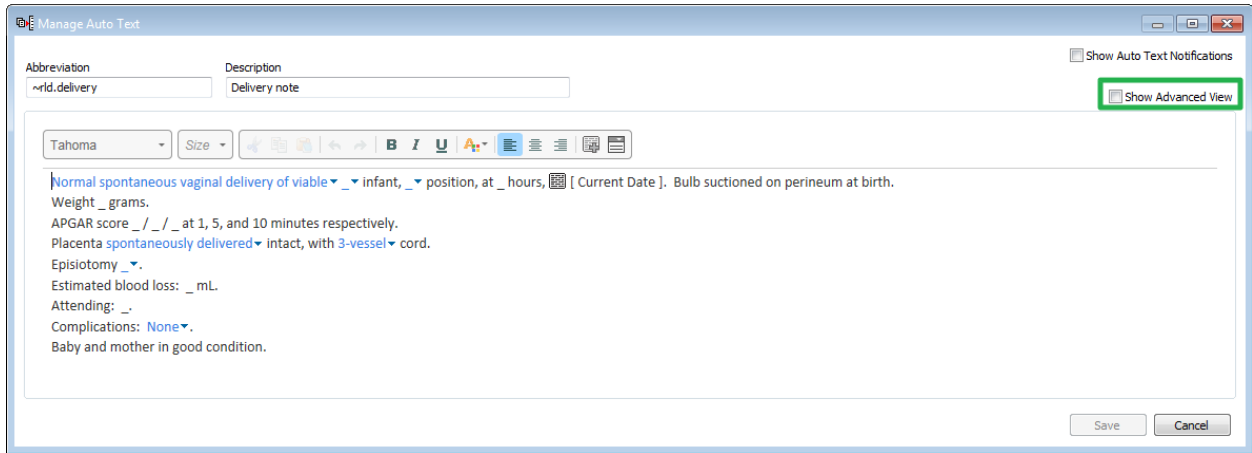


Templates can be powerful tools, so you may wish to experiment and see if you can find things that meet your needs.

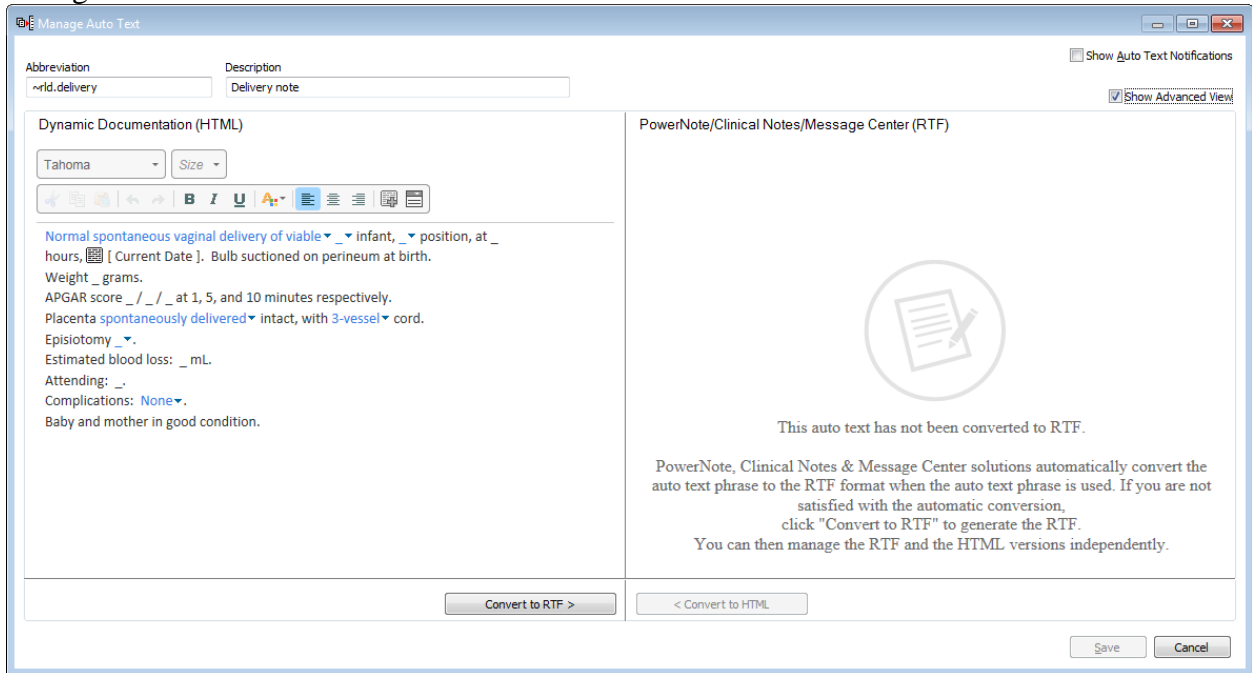
DynDoc vs PowerNote

The above demonstration illustrates the AutoText functionality when used in Dynamic Documentation (DynDoc), our most common documentation method. AutoText works in PowerNote as well, but the nature of PowerNote is such that text formatting may not be as neat and consistent, so you may see some font variability when AutoText is used in PowerNote. Also, some advanced functionality, like dropdown lists, don't work in PowerNote.

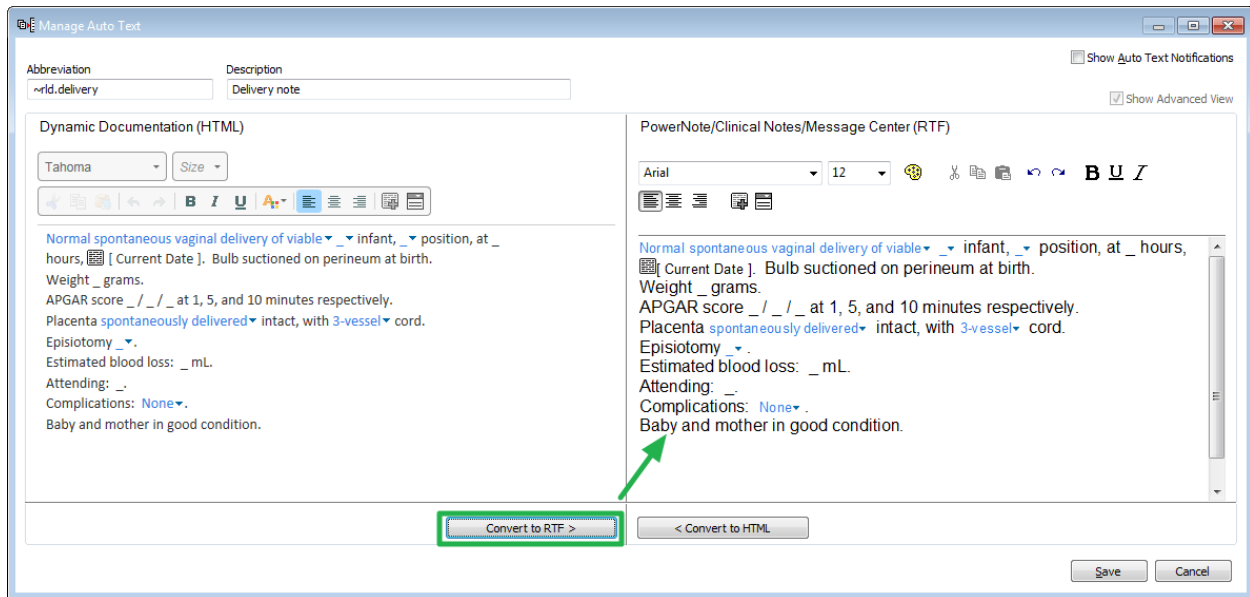
If you would like to separately define how AutoText will appear in DynDoc vs PowerNote, check the **Show Advanced View** checkbox as you're creating the AutoText:



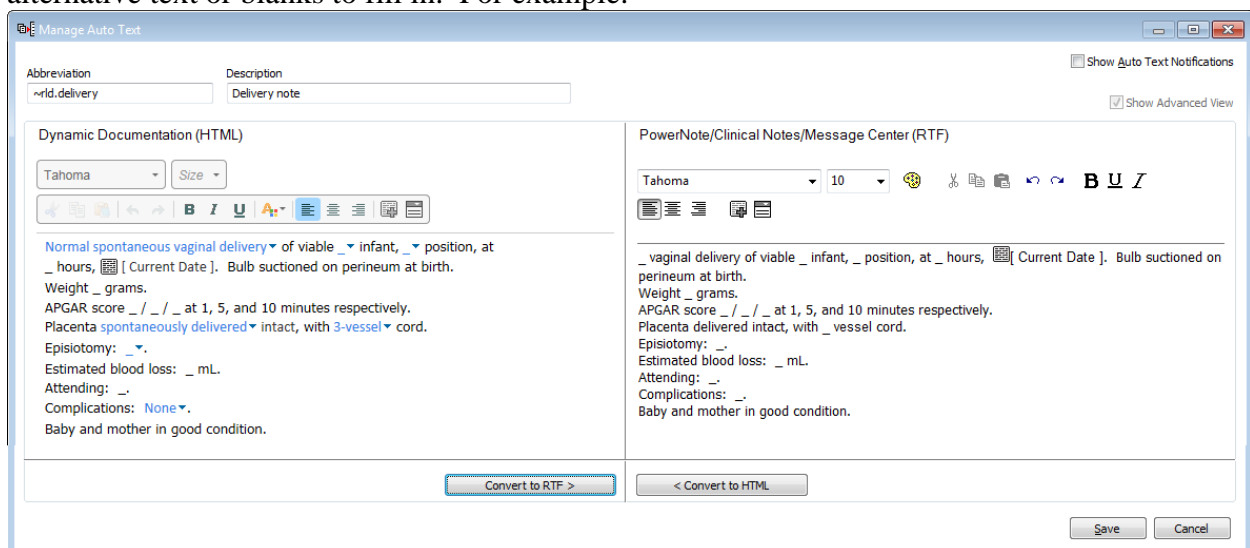
You will see the DynDoc (or HTML) version on the left, and the PowerNote (or RTF) version on the right:



If you leave the right blank, in actual usage the program will provide its best attempt at converting the AutoText you've created into a PowerNote version. But if you'd like to see what the PowerNote version will look like, click the **Convert to RTF** button, and it will display:



They look similar aside from some font variations, but you need to remember that the dropdown lists won't actually work in PowerNote. So you'll want to remove those and replace them with alternative text or blanks to fill in. For example:



Save when done, and you'll know exactly how your AutoText will look in both DynDoc and PowerNote.

Some notes about how and where you will use your AutoText, and some differences between AutoText you can create in Unity versus Dragon Voice Transcription

How you want to use your AutoText may influence some of the choices you make when you're creating it—especially whether you intend to use it mainly when you would otherwise be typing in the EHR, or whether you mainly want to use it with Dragon voice transcription.

If you just want several lines of text to appear in your document, that's easy. Just create the text as illustrated above. After you've inserted it, you can always manually edit a few spots as desired. This works the same whether you're typing or using Dragon.

If you have a fill-in-the-blank situation, however, things differ a bit. When typing within a text field in the EHR, you can jump to the next blank by hitting the F3 key if you use the underscore character to indicate those fields. On the other hand, when creating AutoText within Dragon, you'll want to use brackets instead, so you can jump to them with voice commands like "Next field."

Here's an example. Say as part of a procedure note AutoText you want a line to record the estimated blood loss.

If you intend to utilize it in a spot where you'll mainly just be typing in the EHR, you'd create that line like this:

Estimated blood loss _ ml.

You could hit F3, and the cursor would jump to each underscore in your text in succession, where you could then type the number.

If you intend to call up this and use it mainly with Dragon, you would create that line like this:

Estimated blood loss [] ml.

In Dragon you could navigate to that bracketed field using voice commands such as "Next field," then speaking the number you wish to enter, for example 50. When you've filled in all the fields, you'll say "Accept defaults," and all the brackets will go away.

In either case, you can always just use the mouse/mousepad to go directly to the field. Regardless of which approach you take, the end result would look like this:

Estimated blood loss 50 ml.

The downside of using brackets when you're not using Dragon is that if you never give the Dragon command "Accept defaults," the brackets will remain, looking like this:

Estimated blood loss [50] ml.

Some people may not like that appearance; some won't care.

So if you intend to use the AutoText only in Dragon, you may want to use brackets. If you intend to use it only when typing, or both for typing or Dragon, you probably want to use the underscore.

And here's another example that falls a bit in between those. Say you have an AutoText for a typical adult negative Review of Systems.

If you create it with brackets, it might look like this:

Constitutional: [No fever].

ENMT: [No nasal drainage or sore throat].

Respiratory: [No cough or dyspnea].

Cardiovascular: [No chest pain, palpitations, or edema].

GI: [No abdominal pain, diarrhea, nausea, or vomiting].

GU: [No dysuria].

Neuro: [No dizziness, headache, or focal weakness].

Integumentary: [No pruritus or rash].

Musculoskeletal: [No joint pain or neck/back pain].

Hema/Lymph: [No lymphadenopathy].

In Dragon, you could use navigation commands like "Next field" to move among the bracketed fields. If you then dictate, it'll replace the whole field. When done you would say "Accept defaults" to remove the brackets.

If you weren't using Dragon, you'd have to use the mouse to place the cursor at the desired location to make the change. And if you wanted to get rid of the brackets, you'd have to remove them one at a time.

So you might prefer to make the AutoText without brackets, like this:

Constitutional: No fever.

ENMT: No nasal drainage or sore throat.

Respiratory: No cough or dyspnea.

Cardiovascular: No chest pain, palpitations, or edema.

GI: No abdominal pain, diarrhea, nausea, or vomiting.

GU: No dysuria.

Neuro: No dizziness, headache, or focal weakness.

Integumentary: No pruritus or rash.

Musculoskeletal: No joint pain or neck/back pain.

Hema/Lymph: No lymphadenopathy.

You can't use Dragon navigation commands, but you can still put the cursor wherever you need it, then dictate or type the change.

Here's another advantage of using this approach. Say you want to change Musculoskeletal to "No joint pain or neck/back pain. Has diffuse myalgias in extremities." With brackets and using Dragon, you'll have to dictate that entire phrase. Without the brackets, you could just insert the cursor after pain and dictate or type "Has diffuse myalgias in extremities."

So it becomes a matter of preference. Is the convenience of voice navigation with Dragon useful to you, or does the presence of all the brackets bother you if you don't use Dragon?

AutoText creation strategy

When it comes to creating all of these AutoTexts, you may be thinking about sitting down and doing a bunch all at once, and that approach is fine. But many people never get around to that. Note that it is actually pretty easy to create these on the fly as you're seeing patients. Every time you find yourself typing or dictating something that you think you might use again in the future, copy that text and save it as an AutoText. You may find yourself editing/refining it a bit the first few times you use it, but after a few days you'll probably have it buffed pretty well. All this only takes you a moment, and the future time savings will pay you back multiple times over.
