

# Community User - SmartTools

SmartTools are templates and shortcuts that can help you document faster.

SmartTool	Use to pull in
SmartTexts	Templates or blocks of text
SmartPhrases	Templates or blocks of text that you can create
SmartLinks	Information from another part of the cart
SmartLists	A predefined list of choices










You can use SmartTools in many places throughout the web application. If you see these buttons, the field is SmartTool-enabled:



## Use SmartTexts







SmartTexts are standard templates or blocks of text used to write notes for routine visits or problems you treat often, such as diabetes.

1. Click  to see a list of available SmartTexts.
2. Double-click a SmartText to insert it.
  - Click  next to a SmartText to mark it as a favorite so it's easier for you to find later. Note that this option is available only in certain activities.
3. Press **F2** or use the   icons to complete any SmartLists and wildcards (\*\*\*) in the SmartText.
  - A wildcard (\*\*\*) is a placeholder. You can type over it with your own text or delete the placeholder.
  - Depending on the activity, the   icons might be under the  **All Tools > All Other Tools** menu.


## Use SmartPhrases and SmartLinks

### Use a SmartPhrase

SmartPhrases allow you to type a few characters that automatically expand to a longer phrase, paragraph, or template. For example, typing ".me" enters your name.

1. In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name. For example, enter ".me". As you type, a list of matching SmartPhrases and SmartLinks appears.
2. Use the arrow keys to select the SmartPhrase you want to use and press Spacebar to insert it.
  - Click  next to a SmartPhrase to mark it as a favorite so it's easier for you to find later. Note that this option is available only in certain activities.
3. Press **F2** or use the   icons to complete any SmartLists and wildcards (\*\*\*) in the SmartPhrase.
  - A wildcard (\*\*\*) is a placeholder. You can type over it with your own text or delete the placeholder.
  - Depending on the activity, the   icons might be under the  **All Tools > All Other Tools** menu.


## Create a SmartPhrase from text you type

1. Type the text you want to save as a SmartPhrase. Make sure the text doesn't include any patient-specific information so you can reuse it for other patients.
2. Select the text and click .
3. In the SmartPhrase Editor, enter a short, intuitive name for your SmartPhrase in the **Name** field. Preface the name with your initials so you can find it easily. This is the name you'll type to insert the SmartPhrase into your documentation.
4. Enter a summary of your SmartPhrase in the **Description** field. When you search for your SmartPhrase, this description appears in the results after the SmartPhrase name. If you leave the description blank, the beginning of the SmartPhrase text appears.
5. In the **Synonyms** section, enter any synonyms that can be used to search for your SmartPhrase. Note that this option is available only in certain activities.
6. In the **Sharing** section, list other users who should be able to use your SmartPhrase. Note that this option is available only in certain activities.
7. Click **Accept** to save and close your new SmartPhrase.

## Use a SmartLink

SmartLinks help you write more quickly by pulling or "linking" information from the patient's chart directly into your documentation. SmartLinks often appear within SmartPhrases, but you can also use them on the fly. To pull one in, enter a period (.) followed by the SmartLink's name, as you do when using a SmartPhrase.

## Browse available SmartPhrases and SmartLinks

1. Click  on the SmartTool toolbar.
2. Click any of the letters to see SmartPhrases and SmartLinks whose names start with that letter.

## Use SmartLists


SmartLists are lists of common choices that help you quickly customize your documentation. For example, a symptoms SmartList might contain choices like wheezing and chest pain. SmartLists are used in SmartTexts and SmartPhrases and look something like this: {symptoms:406}.

1. Press **F2** to jump to the next SmartList or wildcard (\*\*\*) in your note. Some values in a SmartList might be selected by default. You can change them if needed.
2. Click other values to select them.
  - A yellow background indicates that you can select only one value.
  - A blue background indicates that you can select one or more values.
3. If you accidentally select a value, click again to clear it.
4. To save your selections and move to the next SmartList or wildcard, right-click or press **Enter**.



Use the mnemonic "left-click to pick, right-click to stick" to remember which mouse button to use when you're making selections.



You can save time by documenting any abnormal values first and then applying any default values for the remaining SmartLists in one click. After selecting abnormal values, click  on the SmartTool toolbar to apply any available default values for the remaining SmartLists.

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