Auto Text: Create and Modify Auto Text
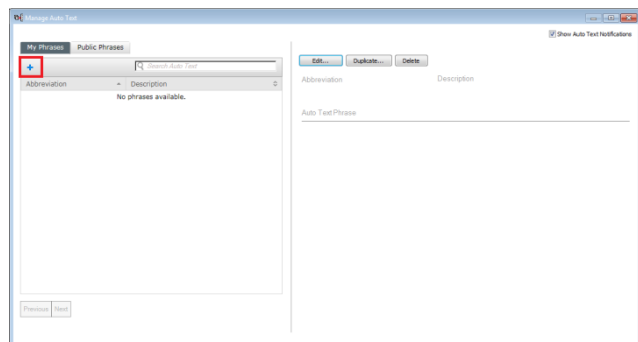
Quick reference guide

Auto Text enables the user to insert predefined words and phrases into a note or document by typing just a few characters.

To create a new Auto Text phrase:

1. Open a blank progress note

2. Select the *Manage Auto Text* icon

3. Select the *New Phrase* icon

4. Enter the *Abbreviation.* It is recommended that the abbreviation is preceded by a unique, uncommon character. For example, the `grave accent (reverse apostrophe) i.e. `Pat. A capital letter will also ensure the AutoText appears at the top of the list.

5. Enter a *Description.* The description can be the full name for the Auto Text.

6. Enter the complete phrase into the free text field.
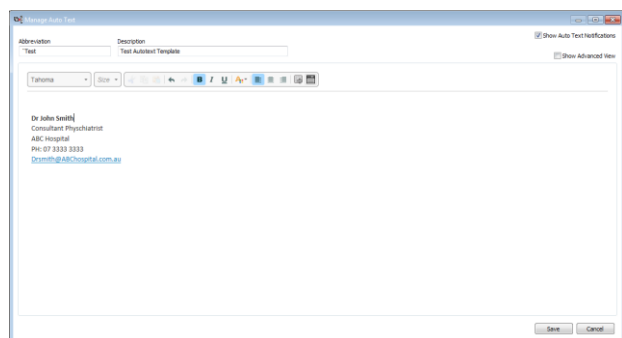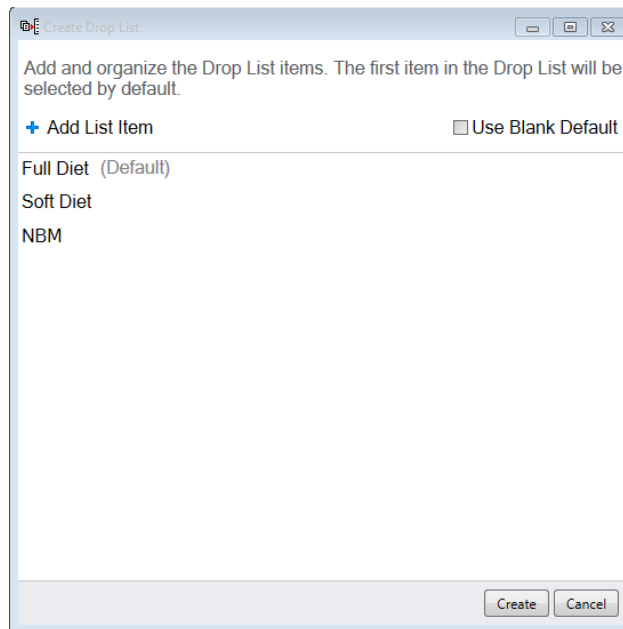
To insert Templates/Tokens:

7. Click *Insert Templates/Tokens* icon in the Manage AutoText Window

8. Select a smart template required, then click *Insert.*

To create a drop list:

9. Click *Create Drop List* icon in the Manage AutoText window

10. Select + Add List Item

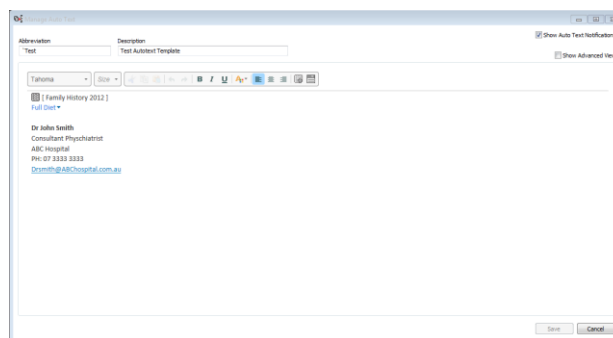11. Enter the list item and repeat process until list is complete.

12. Click *Create*

To create a table:

1. Create a table using Microsoft Word

2. Select, copy and paste the table into PowerChart Auto Text

The Auto Text information will now display in the *Details* pane within the *Manage Auto Text* window

13. Click *Save*

14. Click *Close*

The created Auto Text is now ready to be used and will appear in the *Auto Text list.*

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Using Auto Text in a Document

1. Open a template you want to insert the auto text into.

2. Type the unique character that begins for all Auto Text e.g. ` (grave accent, reverse apostrophe)

3. A list of *Auto Text* abbreviations will appear
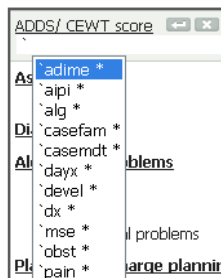
4. Double click the required abbreviation, or Press *Enter*

The full text related to the chosen abbreviation is inserted

To modify an Auto Text phrase

It may be necessary to edit an Auto Text phrase that has been created, to update it with current information.

1. Open a blank progress note

2. Select the *Manage Auto-text* icon.

3. The *Manage Auto-Text* window opens.
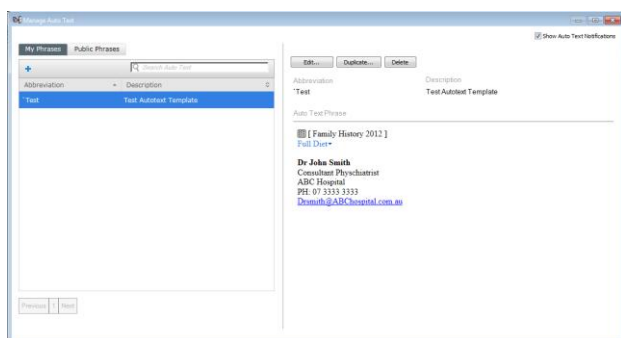
4. Highlight the appropriate AutoText to edit from the *My Phrases* pane and click *Edit…*

The Auto Text information will display in the *Manage AutoText* window.

5. Make the necessary changes in the free text field.

6. Click *OK*

7. Click *Save*

Deleting an Auto Text phrase

1. Open a blank progress note

2. Select the *Manage Auto-text* icon

The *Manage Auto-Text* window will open.

3. Highlight the appropriate AutoText to edit from the *My Phrases* pane

4. Click the *Delete*

5. A *Manage Auto Text* decision window will appear.
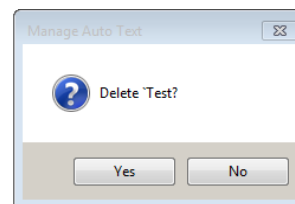
6. Click *Yes*

The Auto Text phrase has now been deleted.