Auto Text (.dot phrase) Guide

Auto Text, often referred to as dot phrases, are designed to help you efficiently complete your documentation.

Auto Text Guidelines

- Do not include phrases such as *Please excuse misspellings and typos* when creating a dot phrase.
- It is recommended to use the following fonts when creating a dot phrase:
  - For Dynamic Doc (HTML): Tahoma 12
  - For Direct Charting (RTF): Calibri 12
- Use general information. Do not include specific patient information when creating a personal dot phrase.
- When copying a dot phrase from another user, review and update the dot phrase to meet your needs. Be sure to remove any of their personal information i.e., signature, contact information, etc.

Basic Dot Phrase information

- A dot phrase can be used in any text box where you see the **Manage Auto Text** icon including Dynamic Documentation, Notes, Message Center, and components in the Workflow Summary.
- To add a dot phrase to your documentation, type a period (.) followed by the name of the phrase. The system might suggest phrases based on what you have typed. Double click on your desired phrase or press enter on the highlighted phrase to add it to your documentation.
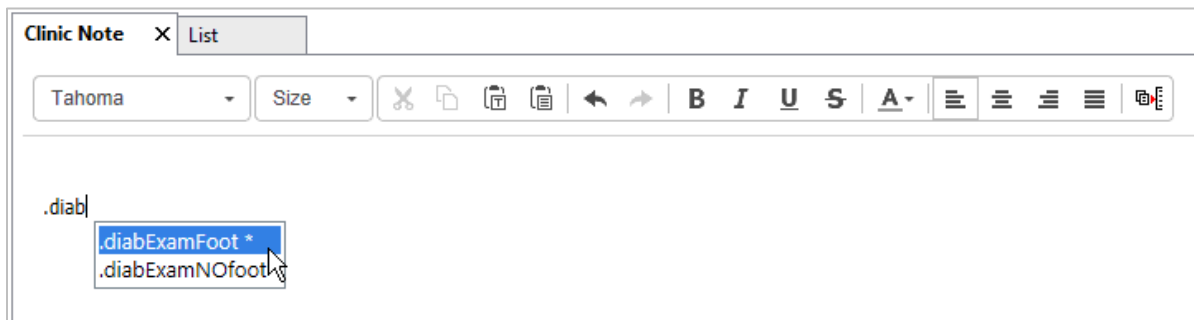
- A dot phrase can contain useful links, underscores, and lists to help you complete your documentation efficiently.
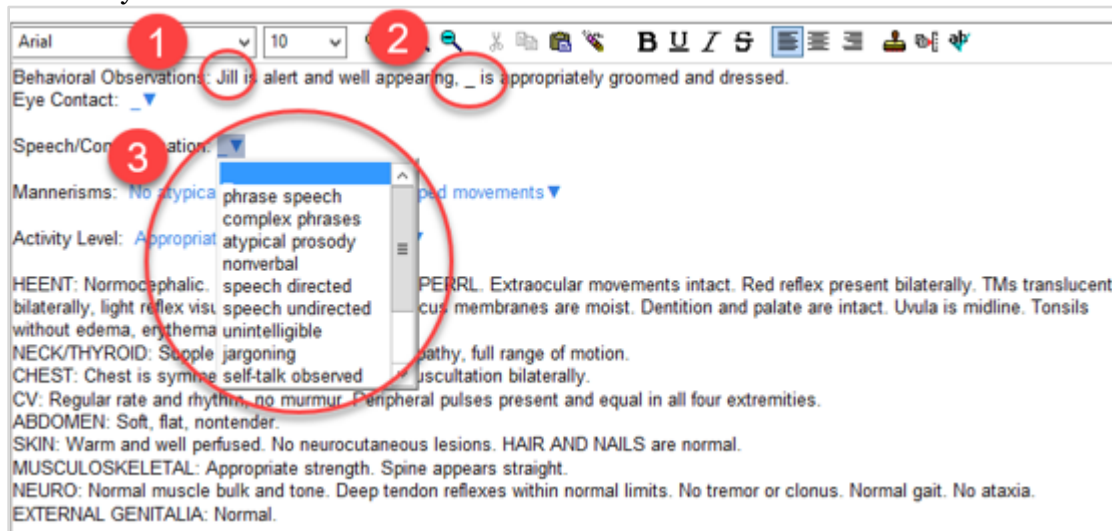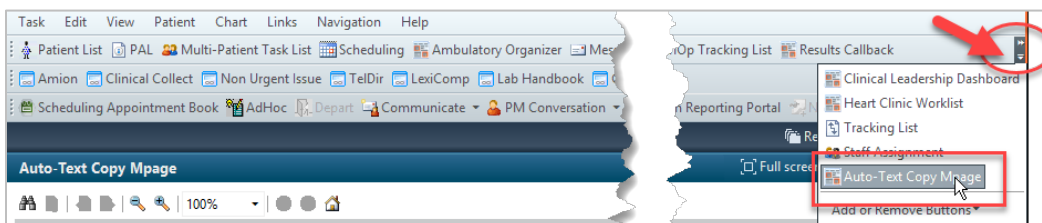

1. When a dot phrase is used in a patient chart, it may link to patient specific information.
   - In this example, the dot phrase links to and pulls in the patient's name.
2. An underscore (_) is a placeholder for you to type or use speech recognition.
   - Press the F3 key on your keyboard to navigate to these placeholders.
3. Blue text with a drop-down arrow indicates a list of predefined options to choose from.
   - Press the F9 key on your keyboard to navigate to these placeholders.

### *Sharing Personal Dot Phrases*

1. Click on the **Auto-Text Copy Mpage** activity on the toolbar within PowerChart.
   Note: If not visible in the toolbar, it will be in the drop-down menu at the end of the toolbar.

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2. The **Auto-Text Copy Mpage** manage window is divided into two sections.
   - Left side: Search, review and copy a colleague's dot phrase.
   - Right Side: Create, view, and manage your own phrases, including phrases that have been copied from other users.
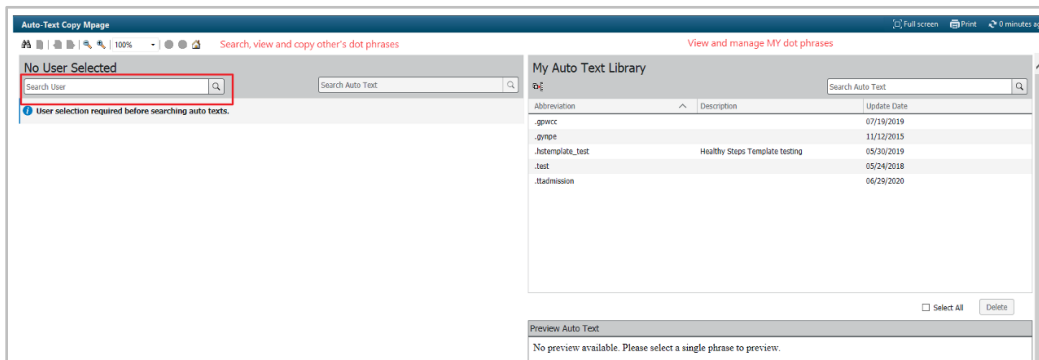

3. Use the **Search User** field to display a colleague's personal library of dot phrase templates. Select a dot phrase to review the content or compare side by side with one of your own.
   - Select **Copy** to add the selected dot phrase to your library.
   - **Note**: Click the checkbox in front of **Select all** to copy the entire colleague's dot phrase library.
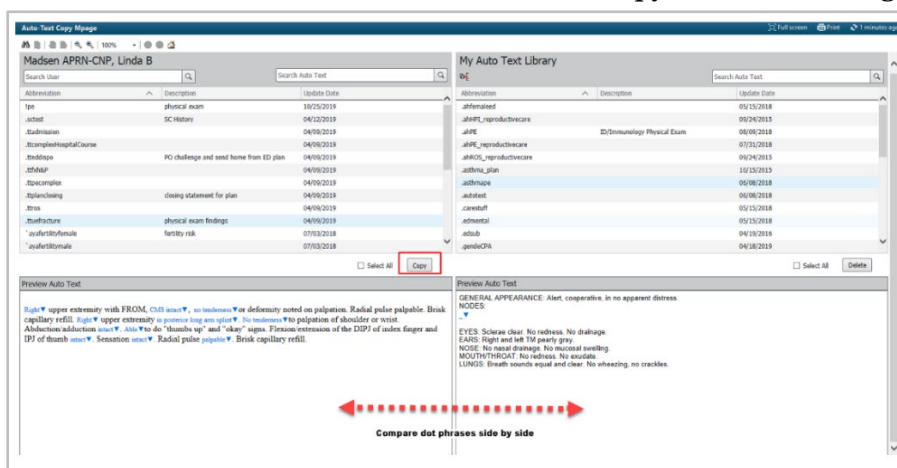

4. A new window displays after selecting **Copy**. The abbreviation and description can be edited. Click **Copy** once edits are completed.
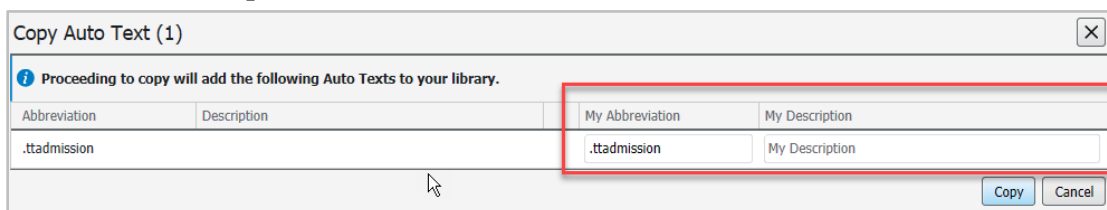

Note: Editing the dot phrase abbreviation only applies to your dot phrase. Your colleague's dot phrase remains the same.

3

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5. Once a dot phrase is copied to your library, it can be edited using the **Manage Auto Text** icon. See Creating or Managing a Dot Phrase for editing instructions.
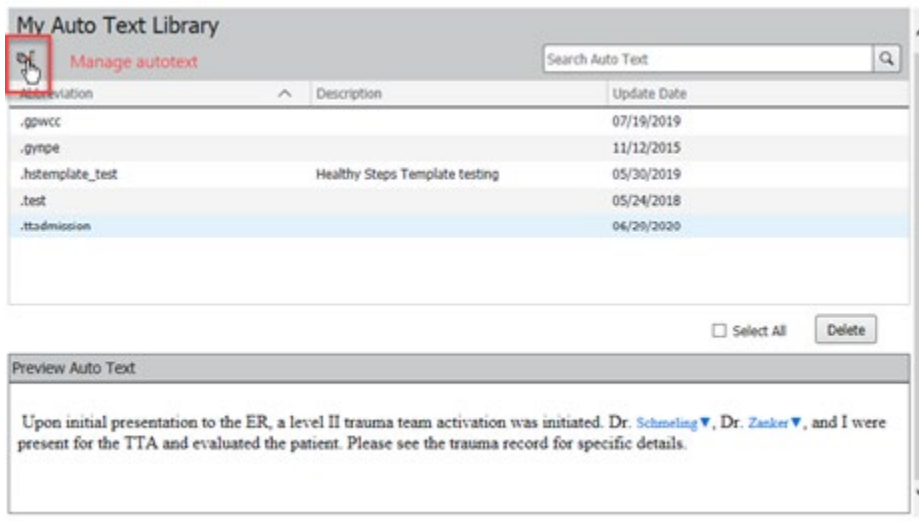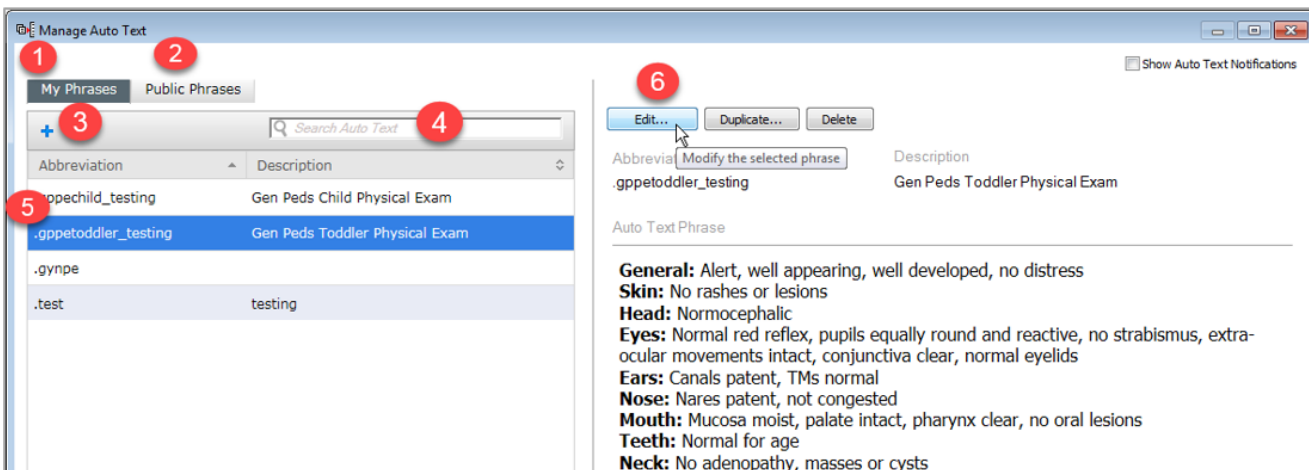

Creating or Managing a Dot Phrase

To create or manage your personal dot phrases and to view public dot phrases available for use, click the **Manage Auto Text** icon in any document toolbar.
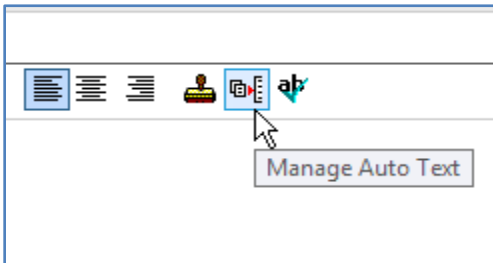

The following view displays:

1. **My Phrases**: Default opens to this tab, which displays a list of all your personal dot phrases.
2. **Public Phrases**: Select this tab to view dot phrases created by IT and available system wide.
3. Click the **Plus** sign to create a new personal dot phrase.
4. **Search** field: Enter key words to narrow your search results displayed list.

5. Select a dot phrase to preview content which displays on the right-hand side.
6. Select **Edit**, **Duplicate** or **Delete** to manage your personal dot phrases.

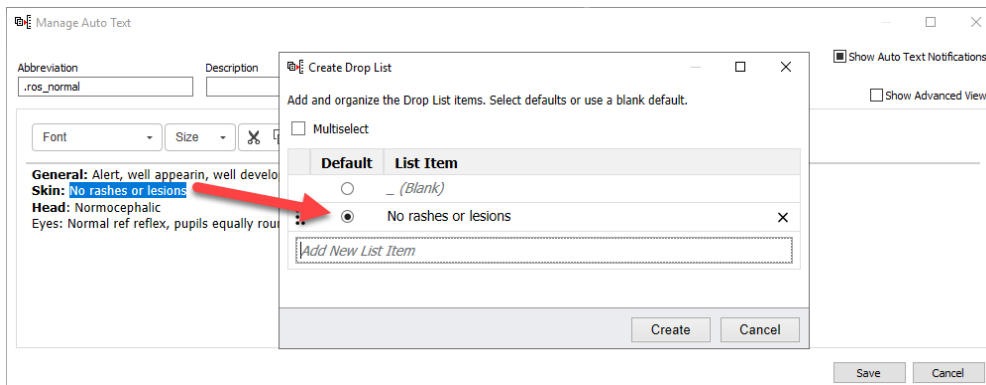### *Adding a Drop List to Your Dot Phrase*

1. Click the **Manage Auto Text** icon.
2. Select the personal dot phrase to edit.
3. Click the **Edit** button to modify the document.
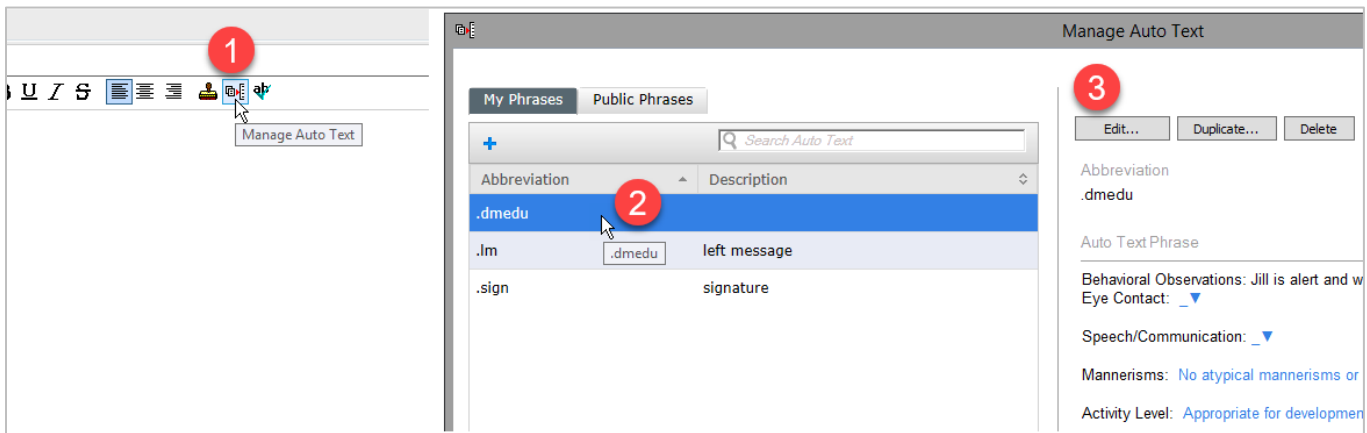
4. Highlight list of items to be added to the new Drop List. Click **Create Drop List.**
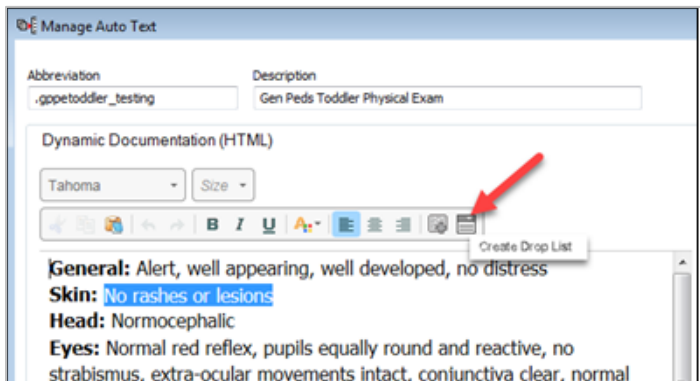
5. A window displays to add and organize the Drop List items.
   - The first item in the Drop List will be selected by default.
   - To add an item to the Drop List, type it in **the New List Item** field.

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6. To add additional items to your Drop List, type them in the **Add New List Item** field and press Enter on your keyboard.

   Note: Additional modifications to the Drop List can be made:

   - Change default list item by selecting the item you wish to auto populate your note. Selecting the blank option as your default, prompts you to add the appropriate response for each patient.

   - Click the [icon] and drag the item to rearrange the order.

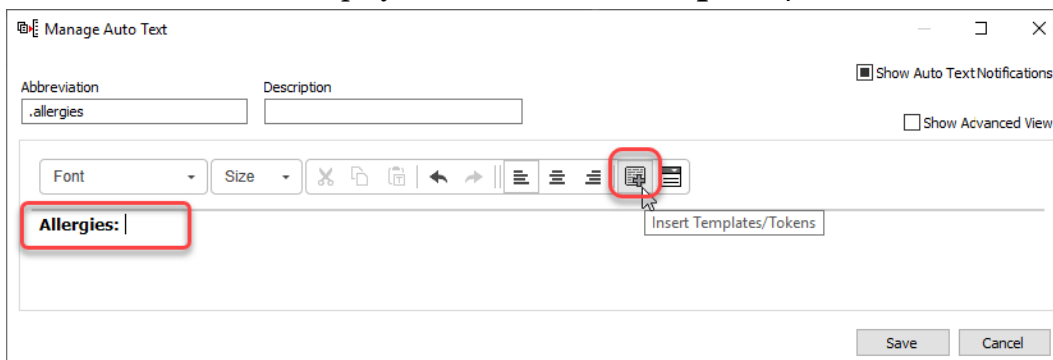   - Click to select [Multiselect] to allow you to select more than one response in your list.

7. Click **Create** to finalize.
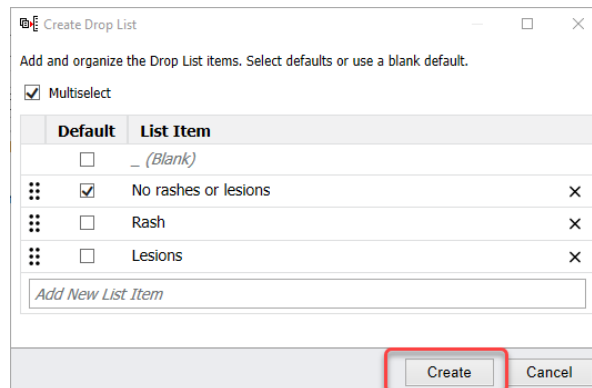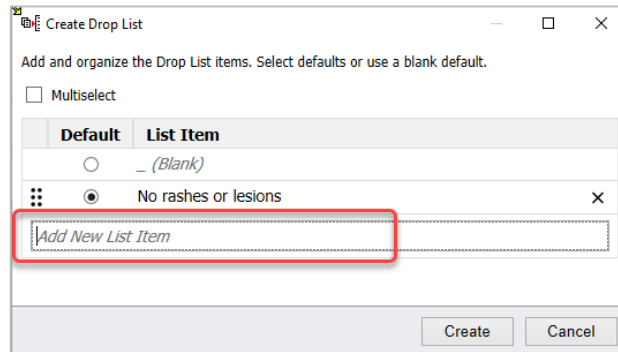
Using Tokens

Tokens allow for patient specific data to be included in a dot phrase. Examples include name, age, weight, etc.

1. Before you click the **Insert Templates/Tokens** button, be sure your cursor is in the location where you want the token data to display. Click the **Insert Templates/Tokens** button.

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2. The following view displays.
   Note: If you are in a patient's chart while inserting a token, the information displayed in the preview pane will be that patient's information. If you are not in a patient's chart while inserting a token into your dot phrase template, there will be no information displayed in the preview pane.
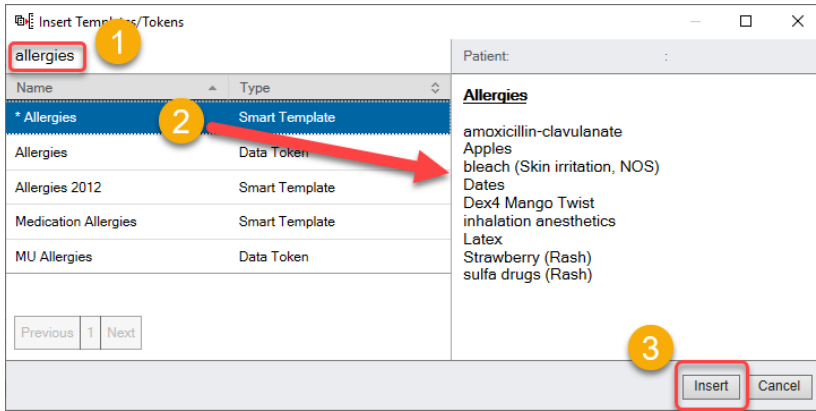
1. To search **Templates/Tokens**, type in a keyword or search from a list.

2. Select from the list to preview an example of how the content will display.
   Note: The information displayed will be based on the patient's chart currently open.

3. Click **Insert** to add the token to your dot phrase.

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