

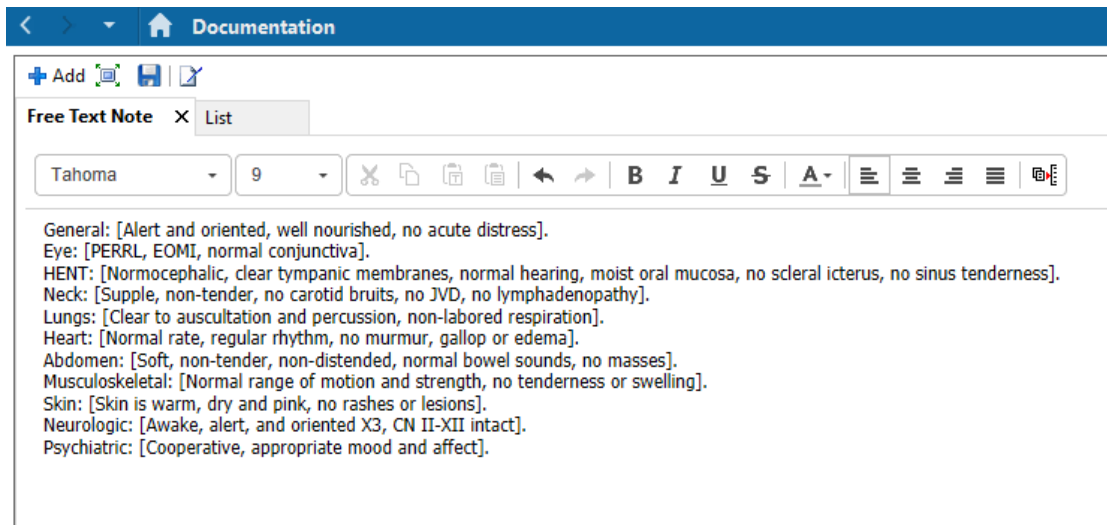
One Person One Record – Clinical Information System (OPOR-CIS): Auto Text & SMART Templates/Tokens

This short guide is intended to provide information on **Auto Text & SMART Templates/Tokens** usage within the One Person One Record Clinical Information System (OPOR-CIS).

What is Auto Text?

Auto Texts, also known as **Dot Phrases**, are shortcuts to populating specified bodies of text. Typically, they are used to efficiently input frequently used sentences, phrases, or documentation templates. Additionally clients can add to their Auto Text SMART Templates/Tokens, which will be elaborated on below.

For example, to **document a physical examination via Auto Text**, you can type “.PEComplete “ to populate the following:



The screenshot shows a web-based documentation interface. At the top, there is a blue header with a home icon and the word 'Documentation'. Below the header is a toolbar with icons for adding, saving, and printing. The main area is titled 'Free Text Note' and contains a list of physical examination findings, each enclosed in square brackets. The findings are: General: [Alert and oriented, well nourished, no acute distress]. Eye: [PERRL, EOMI, normal conjunctiva]. HENT: [Normocephalic, clear tympanic membranes, normal hearing, moist oral mucosa, no scleral icterus, no sinus tenderness]. Neck: [Supple, non-tender, no carotid bruits, no JVD, no lymphadenopathy]. Lungs: [Clear to auscultation and percussion, non-labored respiration]. Heart: [Normal rate, regular rhythm, no murmur, gallop or edema]. Abdomen: [Soft, non-tender, non-distended, normal bowel sounds, no masses]. Musculoskeletal: [Normal range of motion and strength, no tenderness or swelling]. Skin: [Skin is warm, dry and pink, no rashes or lesions]. Neurologic: [Awake, alert, and oriented X3, CN II-XII intact]. Psychiatric: [Cooperative, appropriate mood and affect].

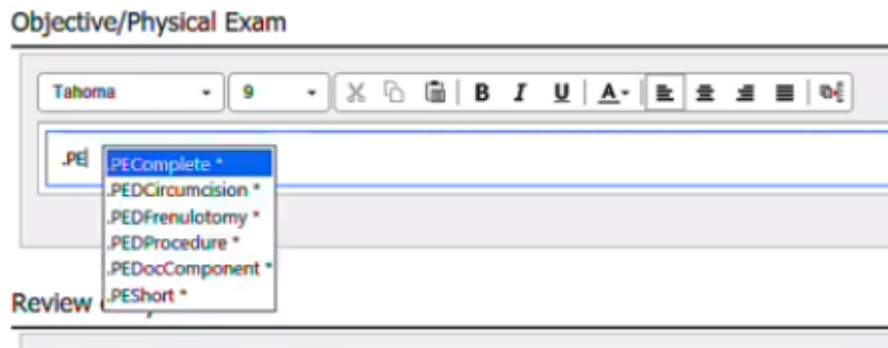
Copyright © 2023, Oracle. Used under license and/or permission.

How do I use Auto Text?

As exemplified in the example above, Auto Texts must be triggered by typing a unique trigger code/query. These queries typically consist of case-sensitive letters and special characters such as periods (.), commas (,), a box bracket (|), and asterisks (*).




As you start typing, Auto Text options will appear in a drop-down menu. Select the desired Auto Text from the menu by pressing Enter on the highlighted query. An example of the drop down menu is shown below for the physical examination Auto Text.

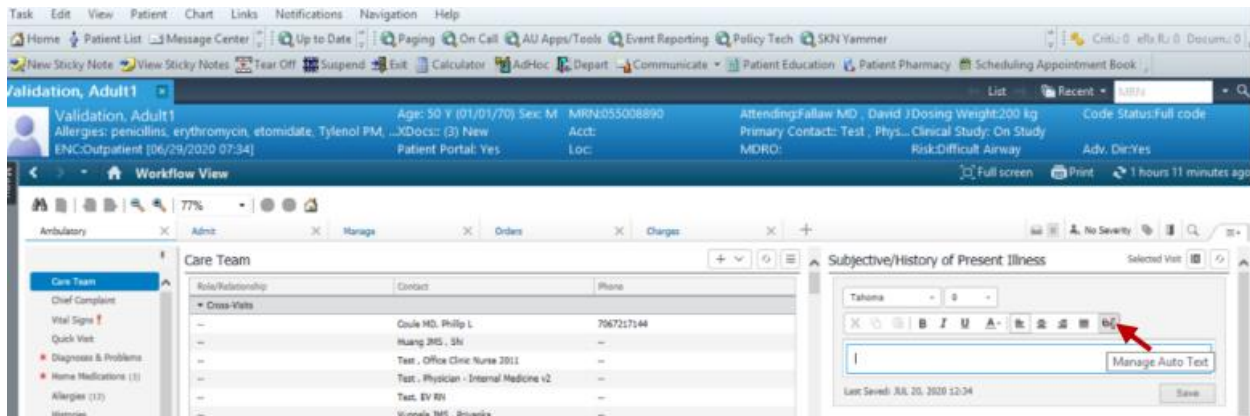


Copyright © 2023, Oracle. Used under license and/or permission.

Upon pressing ENTER on the desired phrase, the text will populate into the text field, and you may edit this text however necessary.

What Auto Texts are Available?

To view a list of possible Auto Texts and their respective trigger codes/queries, or wish to build your own personal Auto Text templates, open a note and click on the *Manage Auto Text* button from the toolbar  (shown below).



Copyright © 2023, Oracle. Used under license and/or permission.

The following database will appear on your screen. Global standardized **Auto Texts** will be built by the CIS and available for use, and can be found in the "Public Phrases" tab.



The screenshot shows the 'Manage Auto Text' interface. On the left, there are two tabs: 'My Phrases' and 'Public Phrases'. Below the tabs is a search bar labeled 'Search Auto Text' which is highlighted with a red box. Below the search bar is a table with columns 'Abbreviation' and 'Description'. The table contains several rows of phrases, with the first row 'NM_Bone_Scan' highlighted. At the bottom of the table are navigation buttons: 'Previous', '1', '2', '3', '4', '5', '67', and 'Next'. On the right side of the interface, there are buttons for 'Edit...', 'Duplicate...', and 'Delete'. Below these buttons is a preview of the 'Auto Text Phrase' for 'NM_Bone_Scan'. The preview shows the text: 'Bone Scan Questionnaire – Please Complete All Questions' followed by four numbered sections: '1) Reason for exam:', '2) Current symptoms and physical findings:', '3) History of related imaging studies performed (e.g. CT, MRI, Conventional Radiography, previous Bone Scan) If yes, where and when:', and '4) Prior history of fractures If yes, cause of fracture, where and when:'. A vertical scrollbar is visible on the right side of the preview area.

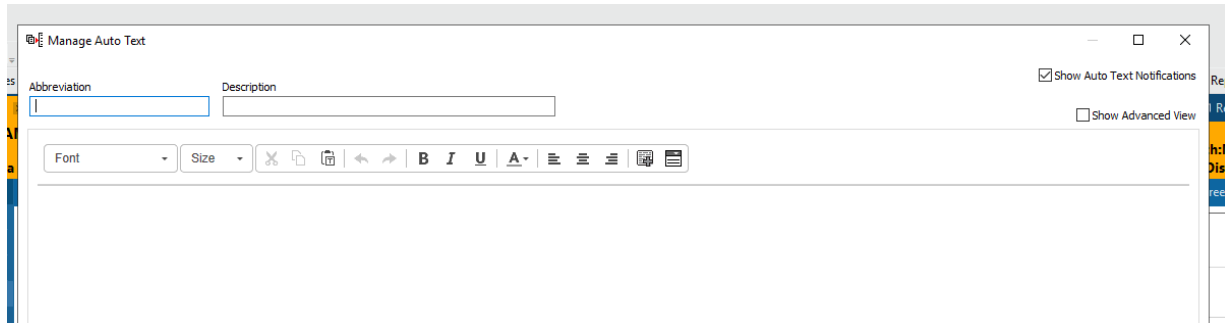
Copyright © 2023, Oracle. Used under license and/or permission.

As shown in the image above, the query (abbreviation) used for each Auto Text is shown on the left column while on the far right of the page, you can preview the associated text and how it will be formatted when populated into a note. The CIS provides a litany of Auto Texts to support efficient documentation. To search for a particular Auto Text, use the **Search bar** boxed in the image above.

How to Create Customized Auto Text

Creating a custom an Auto Text enables you to populate an entire template of text within seconds. Even more time-efficient: **you can design these templates to automatically pull in specified chart data into your template to avoid manual entry – to create such a template, we need to incorporate a feature known as SMART Templates and Data Tokens into our Auto Text.**

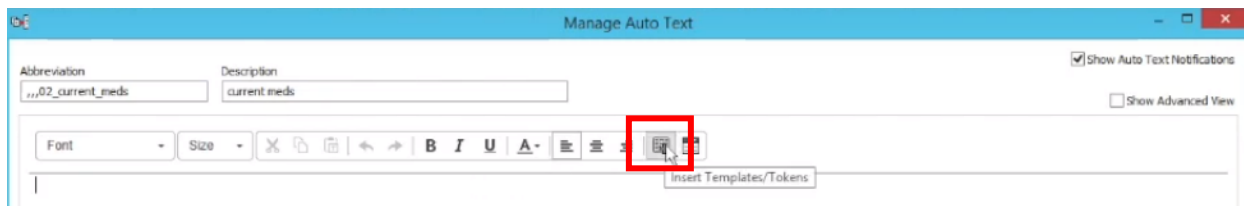
To create a custom Auto Text, go to the Manage Auto Text page shown in the example before. This time, instead of searching for a phrase, press the **+** button to add a new phrase. The following page should appear:



Copyright © 2023, Oracle. Used under license and/or permission.

Into the Abbreviation text box, add the query you wish to use and add the description in the Description field. In the free text field below, enter the text or text template that will replace the Auto Text phrase. Note that you can always go back and modify the Auto Text by clicking the Manage Auto Text button in a note. The text can also be formatted via the editing tools presented in the toolbar.

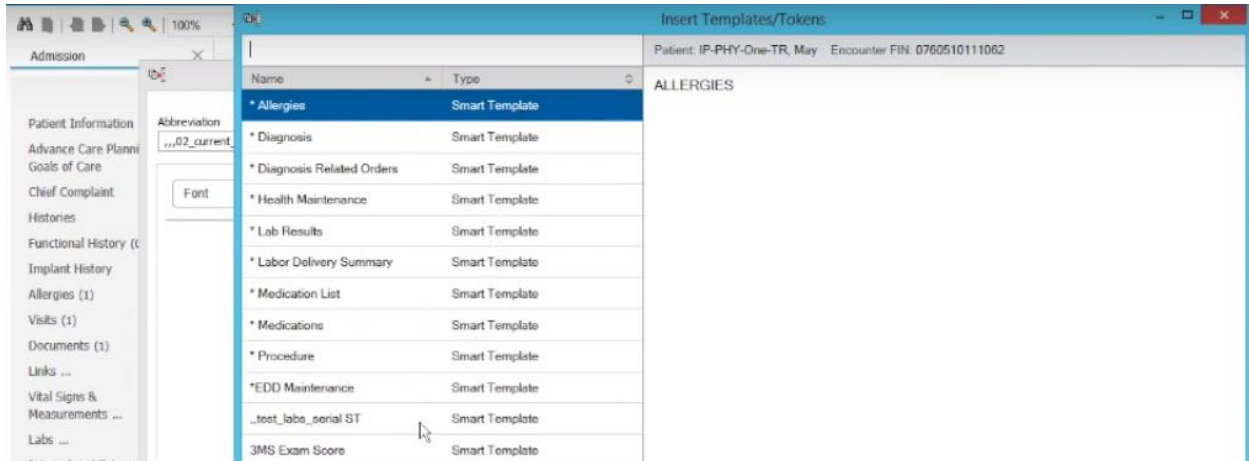
If you wish to automatically populate specific data from a patient's chart within a template (a valuable tool), you need to insert a **SMART template/token** by clicking the icon, as shown below.



Copyright © 2023, Oracle. Used under license and/or permission.

You will then be asked to select the data which you wish to insert into your Auto Text for automatic population. As shown below, a list of possible data elements are available for selection. Note that for each data element you wish to populate into the template, you need to add a separate *SMART* Template/Token. This means that if you wish to incorporate several data elements (e.g. allergies, diagnosis, and heart rate), you need to insert 3 *SMART* Templates/Tokens, one for each data element. Note: If the information you wish to pull into the Auto Text through *SMART* templates/tokens is not available in the patient's encounter, it will leave a blank space. Example, if you have in your Auto Text the *SMART* Template for *Vitals* but no vitals were acquired, it will leave a blank space in that sentence.

It is important to note that updating the patient's data and refreshing the patient's chart does not update the *SMART* Templates/Tokens once the Auto Text is used and the documentation is *Signed*.



Copyright © 2023, Oracle. Used under license and/or permission.

Once you have finished creating your Auto Text and incorporating the useful *SMART* Templates/Tokens, press Save. You are then good to go! Remember that you can always come back to the Auto Text (whether it is a few phrases or an entire template) to make edits.

Looking to find more information on Auto Text or *SMART* Template/Tokens within OPOR-CIS?

CIS Demonstration videos are available on the opor.nshealth.ca website.

For information on Documentation and Enabled Efficiencies, please view the following link: [Provider Documentation Efficiencies](#)

Please contact CMIO@nshealth.ca for any questions about **Auto Text** or ***SMART* Template/Tokens** in the OPOR-CIS.

While this guide provides a brief overview, the **OPOR Education and Learning team** will prepare you with detailed content and experience leading up to the CIS implementation.



V4 (03 May 2024)