# Using SmartTools

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

| SmartTool | Use to pull in |
|---|---|
| Use to pull in | 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 |

**NOTE:** You can use SmartTools in many places throughout the web application, such as In Basket messages. If you see the following 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.**
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.**

## 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.**
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.**

## 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.**

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

**NOTE:** 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.

## Open a Report

1. **Navigate to the Reporting activity and click the name of the report to request it. The status of the report will indicate that results are pending.**

   a. You can navigate away from this activity and receive a notification when your report is prepared.

2. **If the report shows a list of patients, click on the folder icon to open a patient's chart and view more details.**