

Provider User Settings One Pager

Use this guide as a companion as you continue updating your user settings at and after go-live. To see more specialized personalization opportunities, please refer to the [User Settings Guide on MethodistMD](#).

MyTools

Open  **MyTools** in the toolbar in the right top corner to access the **My SmartPhrases, SmartList, MacroManager and Preference List Composer** activities. You can also chart search to open these activities.

Create your own note templates with SmartPhrases

- Find the name of the note template you want to update for yourself. Or, click  at the top of the Notes sidebar and write down the name of the SmartText you want to change.
- Click  **My Tools** on the main toolbar, and then select  **My SmartPhrases**.
- Create a new SmartPhrase and give it a short, intuitive name.
- In the **Insert SmartText field**, enter the name of the note template you recorded in step 1.
- Adjust the details of the note template as needed.
- Click **Accept** when you're done.
- To use your new SmartPhrase, type a period followed by the SmartPhrase name, and then press "Spacebar".

Create a SmartPhrase from text you type

- While charting, 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.
 - o You can create a SmartPhrase anywhere you see this toolbar:



- Select the text and click .
- In the SmartPhrase Editor, customize your SmartPhrase and click **Accept** to save.

Add a SmartLink to your SmartPhrase to pull in patient specific information

- In the location where you want the SmartLink to appear, enter a period followed by the first few letters of the SmartLink's name. A list of matching SmartLinks appears.
- Double-click a SmartLink to insert it. The SmartLink appears in your SmartPhrase between @ symbols, such as @NAME@.
 - o For a list of SmartLinks that are commonly used in outpatient notes, refer to the Useful SmartLinks guide on your Learning Home.

- On the inpatient side, you can find a list of commonly used SmartLinks and SmartPhrases in the Summary sidebar under the Index report.
- Click **Accept**.

Add a SmartList to your SmartPhrase

- Open one of your SmartPhrases. In the **Insert SmartList** field, enter the first few letters of the SmartList and press **Enter**.
- To create a new SmartList, open  **SmartList** from  **MyTools**.

Create a NoteWriter Macro

- After making your selections on the ROS, Physical Exam, or Procedures tab of the NoteWriter, click  to the right of the  button and select Create macro from current data.
- In the Macro Selection window, enter a name for your macro and click Accept. Note any age and sex restrictions that appear.
- In the SmartBlock Macro Editor, select any other items that you commonly record. Then select the Released check box and click  Accept. Your macro is now available for use.
- To create a Macro at your convenience, use Chart Search to open **SmartBlock Macro**.

Add orders to your Preference List

- Look up an order and edit the details as usual.
- Before signing the order, hover over it and click  to add it to your preference list.
- In the **Display name** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.
- In the Section field, enter the section of your preference list in which you want this order to appear. Or, click **New Section** to add another section to your list.
 - If you don't specify a section, the order will appear in the My Favorites section.
- Enter any other details you want to use when you place this order in the future, such as instructions or answers to questions. These details appear only for you, and you can always update them later.
- Click **Accept** and indicate whether you want to use the details you entered in step 5 for the current patient.

Edit your Preference List

- Use Chart Search to open the **Preference List Composer**.
- In the list that appears, double-click your Orders (Outpatient) or Orders (Inpatient) preference list.
- Select the section or subsection that contains the order you want to edit.
 - To move an order to a different section, click the order and drag and drop it into another section.
 - To modify order details, such as frequency or display name, double-click the order's name.
 - To change the name of a section or subsection, click  **Properties**.
- When you're finished making changes, click  in the upper-right corner.