



Advanced SOAPware User Manual - Clinical

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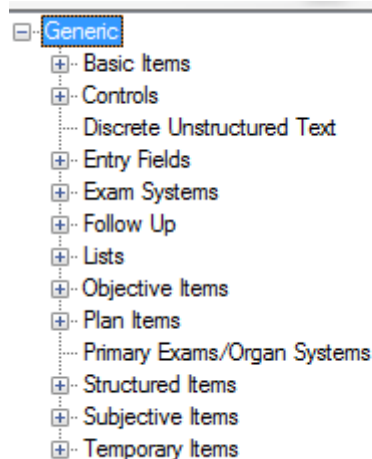
Advanced SMARText



SMARText Item Types

Every SMARText item is designed as a specific type. The type chosen tells SOAPware the characteristics of that SMARText item such as what kind of data to expect, what the item can do, and how the item can be designed.

First Level View of SMARText Item Types

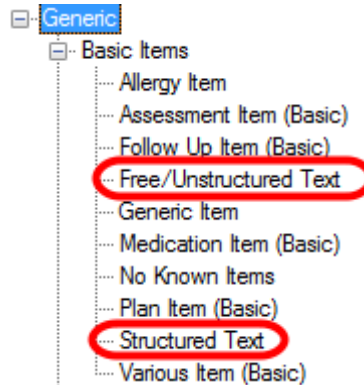


In order to see the current list of SMARText Item Types available:

- Click Docutainers > SMARText Items, from the main menu, or Click F10 on the keyboard.
- Click on the green plus, which will bring up the SMARText Type Selection box.
- Select "Custom," and Click on the drop-down arrow.
- Lastly, Click on the expander node next to "Generic" as shown in the screen shot above, to see the first level view of the SMARText Item Types available. Should a user want to see all of the SMARText Item Types, Click on the expander nodes next to each first level SMARText item.



First Level - Basic Items



1. Free/Unstructured Text (Misc (US))

Unstructured text is the simplest of all the SMARTText item types, as it is free-text. It has no value to the computer, with its lack of codes attached to it for searching/sharing purposes, but can be useful when a user needs to insert typed words, sentences, or even paragraphs of text. For those who converted from Version 4, all previously created SMARTText items will convert as unstructured text.

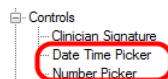
For more information on unstructured text, see: [Code Expander/Macro](#).

2. Structured Text

The advantage of the Structured Text SMARTText item type is that the data inserts an object of text that cannot be altered and can be fully coded. Therefore, this item type is often chosen for the individual SMARTText items that are listed within pick lists.

For more information, please review the [Data Entry in SOAPware](#) chapter within the Clinical 2012 User Manual.

First Level - Controls



1. Number Picker SMARTText Item

A user would utilize the Number Picker SMARTText item type if he/she wanted to document

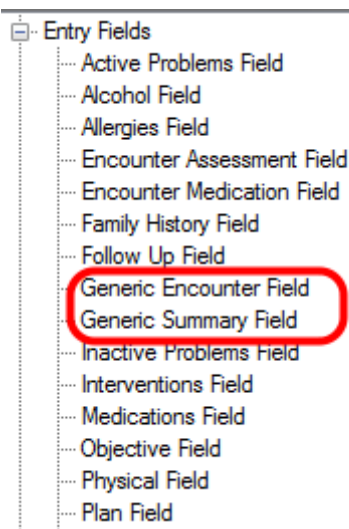


information that could be best displayed with a number. To view this lesson, see: [Number Picker SMARTText Item](#).

2. Date Time Picker

A user would utilize the Date Time Picker SMARTText item type if he/she wanted to document information that could be best displayed with a particular date or time. To view this lesson, see: [Date Time Picker SMARTText Item](#).

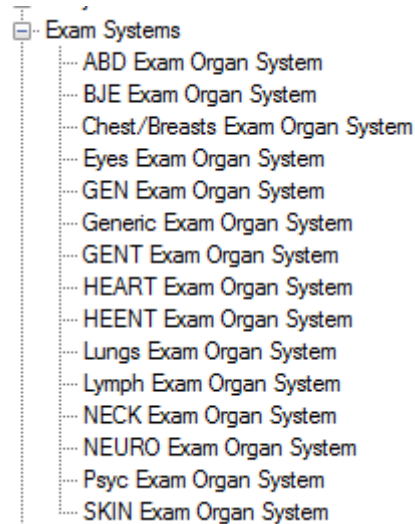
First Level - Entry Fields



Focusing primarily on the Generic Encounter and Generic Summary Fields....these Generic types allow for new fields to be defined within SOAPware. For more information, see [Create Custom Field Headers](#).

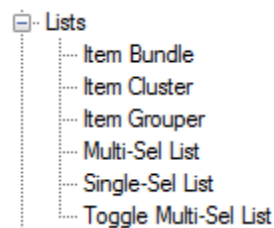


First Level - Exam Systems



In the screen shot above, all the physical exam systems, plus a generic type system, are listed. These Exam System SMARTText item types have been defined by the CMS/AMA. For more information regarding Exam Systems, Click [here](#).

First Level - Lists



1. Multi-Sel List

This SMARTText item type presents a display of SMARTText items to which the user can select one item, or multiple items, to insert into the documentation.

For more information on Multi-Sel Lists, see: [Creating SMARTText Pick Lists](#).

2. Single Select List

This SMARTText item type presents a display of SMARTText items to which the user can only select one item.



For more information on Single Select Lists, see: [Single Select Lists](#).

3. Toggle Multi-Sel List

Toggle Multi-Sel Lists are created "from the ground up," meaning, the user is to first create each component prior to putting the toggle together as a whole.

Structured Text SMARText items will be the components that will be used to "toggle" between, in the user's documentation.

For more information on Toggle Multi-Sel Lists, see: [Creating Toggles](#).

4. Item Clusters and Item Bundles

Item Clusters offer larger, initial pick lists with less need for branching. All of the items within a cluster will be displayed at once, automatically.

Item Bundles offer a branching, hierarchical approach, which displays smaller pick lists. Bundles allow for the bundling of a group of items, to which not all the items are displayed initially.

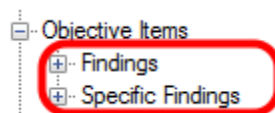
For more information on Clusters and Bundles, see: [Create Item Clusters and Bundles](#).

5. Item Groupers

Item Groupers are SMARText items that, when inserted to a patient's chart, enter multiple pick lists, in a particular sequence, at one time.

For more information on Item Groupers, see: [Create an Item Grouper](#).

First Level - Objective Items



1. Findings

Findings are the 50+ exam elements that comprise the suggested framework to use when creating documentation. If these are present in documentation, they will automatically score exam points for the EM level of visit coding. These items are created by SOAPware and we recommend their use first, however, a user can customize such items.

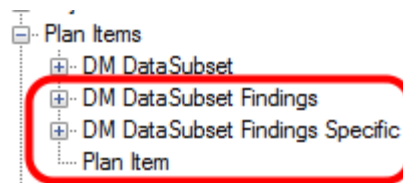
2. Specific Findings-Exam Generic Findings Specific



Exam Generic Findings Specific items types are specific findings on examination and are usually associated with a Findings item. They are usually found within pick lists associated with Findings items.

For more information regarding EM Coder and the Objective Field, see the following links: **EM Coder: Exam** and [Objective Entry](#).

First Level - Plan Items



Plan items are SMARTText item types designed for use in the Plan field. They are designed to record and measure some of the decision making elements as defined by the CMS/AMA, to be used in EM Coding of level of service.

1. DM DataSubset Findings

This type of finding is comprised of the 8 decision making categories as defined by the CMS/AMA for EM Coding.

2. DM DataSubset Findings Specific- Generic Finding Specific

This item type is most commonly used to fill in the specific findings within the DM DataSubset Findings.

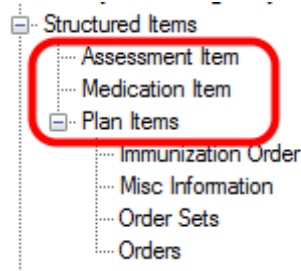
3. Plan Item

Plan items are similar to the Generic Finding Specific type, however, these plan items generally contain CPT codes.

For more information regarding EM Coder and the Plan Field, see the following links: **EM Coder: Exam** and [Plan Entry](#).



First Level - Structured Items



Structured SMARText items may be created for direct insertion into a patient's chart. They can also be created to add to a pick list, bundle, cluster or toggle.

A few benefits of creating structured text items include:

1. Structured text able to be searched using the Data Explorer.
2. Since structured text is easier to search, it may allow the user to be prepared for future Meaningful Use (MU) and Patient Centered Medical Home (PCMH) initiatives.

***Note:** SOAPware first recommends searching for a desired Structured SMARText item through our SMARText Items Manager, as these items are SOAPware created and contain CMS/AMA approved codes, however, a user is able to customize an item if need be.

1. **Assessment Item**

Assessment Item = Type--Dx...used within the Assessment field within the SOAPnote. A diagnosis will be inserted and will be paired with an ICD-9 code, making reporting and searching data easier.

For more information, see: [Assessment Entry](#).

2. **Medication Item**

Medication Item = Type--Rx...used to prescribe, print and fax prescriptions from within the Medications field within the SOAPnote.

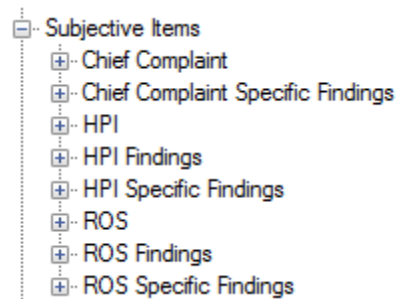
For more information, see: [Medication Entry](#).

3. **Plan Item**



There are four types of SMARText items that are utilized in the Plan field within the SOAPnote: Immunization Order, Misc Information, Order Sets, and Orders. Whether entering a Plan SMARText item through the Actions pick list, or entering one individually, a CPT code will be attached, making searching and reporting data simpler. For more information, see: [Plan Entry](#) and [Order Entry](#).

First Level - Subjective Items



All of these items in the previous screen shot are used within the Subjective field within a SOAPnote.

Chief Complaint- The main header...Chief Complaint(s)/Reason for Visit.

Chief Complaint Specific Findings- The actual list of chief complaints used in documentation.

HPI- The main header...HPI.

HPI Findings- The 8 HPI pick lists.

HPI Specific Findings- The actual list of HPI items used in documentation.

ROS- The main header...ROS.

ROS Findings- The 14 ROS pick lists plus a generic pick list.

ROS Specific Findings- The actual list of ROS items used in documentation.

For more information, see [Subjective Entry](#) and [HPI](#).



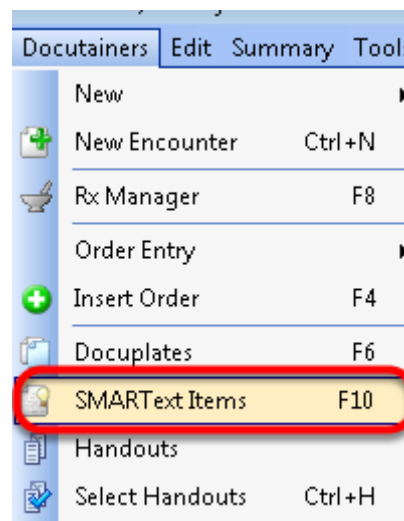
Create Structured SMARText Items

Structured SMARText items may be created for direct insertion into a patient's chart. They can also be created to add to a pick list, bundle, cluster or toggle.

A few benefits of creating structured text items rather unstructured text include:

1. Structured text able to be searched using the Data Explorer.
2. Since structured text is easier to search, it may allow the user to be prepared for future Meaningful Use (MU) and Patient Centered Medical Home (PCMH) initiatives.

SMARText Items Manager

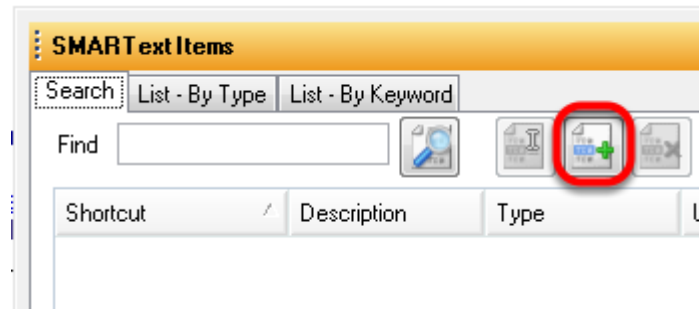


All SMARText items are created in the SMARText Items Manager.

To open the SMARText Items Manager, Click on Docutainers > SMARText Items. Or press **F10** on the keyboard.

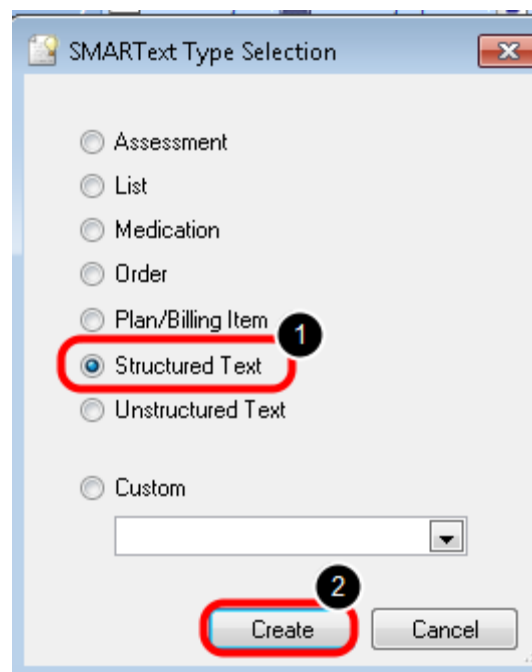


Create a Structured SMARText Item



Click on the green + button to create a new SMARText item.

SMARText Type Selection



1. Select "Structured Text"
2. Click Create



SMARText Designer: Structured SMARText Items

SMARText Designer

Shortcut: jbro

Description: 1 Rose

Keywords: Rose, flower, itg

☐ Display Header ☐ only when item is empty.

Advanced

General

Item Type: Structured Text

Item Properties

Item Settings: 2

Text (Singular): Rose

Text (Plural):

Item Separators:

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - When Empty

3 Save Cancel

1. Insert a Shortcut, (make sure this shortcut is easy to recall) Description and Keywords (be sure to always include a unifying keyword for searching purposes and separate keywords with a comma and a space). A display header is not needed for a Structured SMARText item.
2. In the Item Settings box, under "Text (Singular)", enter the text that should be displayed within the documentation when this structured SMARText item is entered.
3. Click Save.



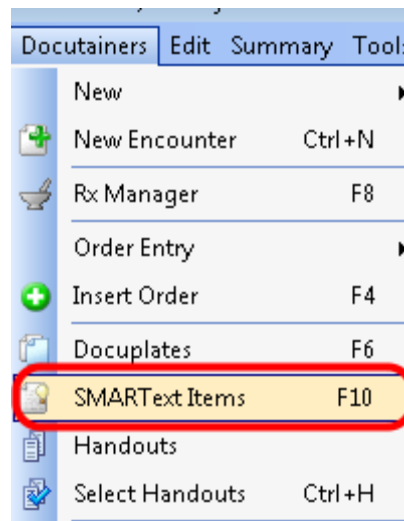
The structured SMARTText item may now be entered directly into a patient's chart, or placed in a pick list, bundle, cluster or toggle. For an example of the latter, please refer to our Toggle lesson.



Single Select Lists

This SMARTText item type presents a display of SMARTText items to which the user can only select one item to enter into the documentation. Please continue to read below for steps on how to create a single select list SMARTText item type.

Step 1: SMARTText Items Manager



All SMARTText item types are created in the SMARTText Items Manager.

To open the SMARTText Items Manager, Click on **Docutainers > SMARTText Items**. Or press **F10** on the keyboard.

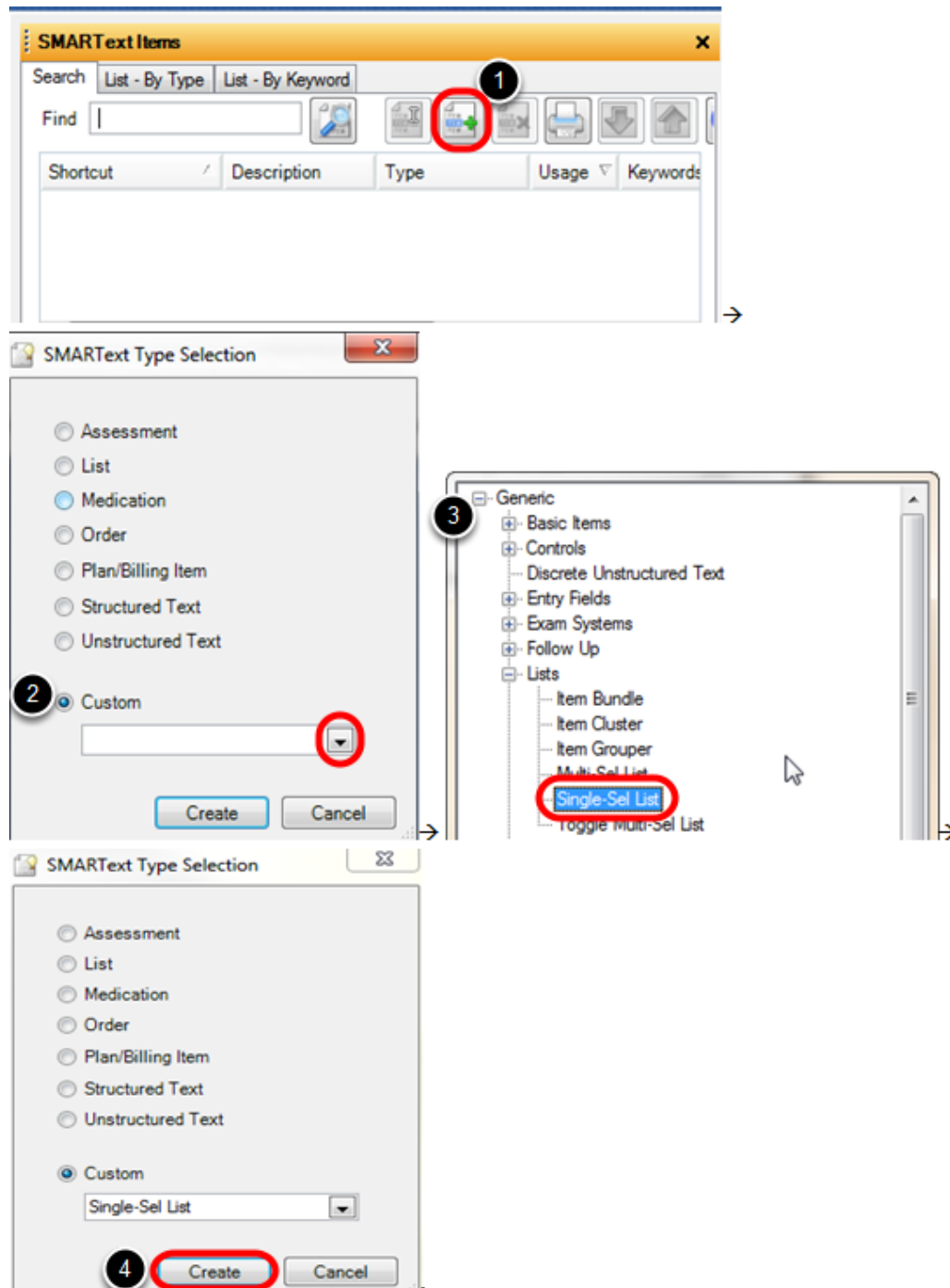
Step 2: Create Structured SMARTText Items

To view a lesson on how to create structured SMARTText items, Click [here](#).

In the example given in the steps below, a user would create the structured items "Married" and "Single" in preparation for the single select list creation.



Step 3: SMARText Type Selection



1. Click on the green plus.
2. Choose "Custom" and Click on the drop-down arrow.
3. Click to expand the expander nodes next to "Generic" and "Lists." Double-Click on "Single-Sel"



List."

4. Click Create.

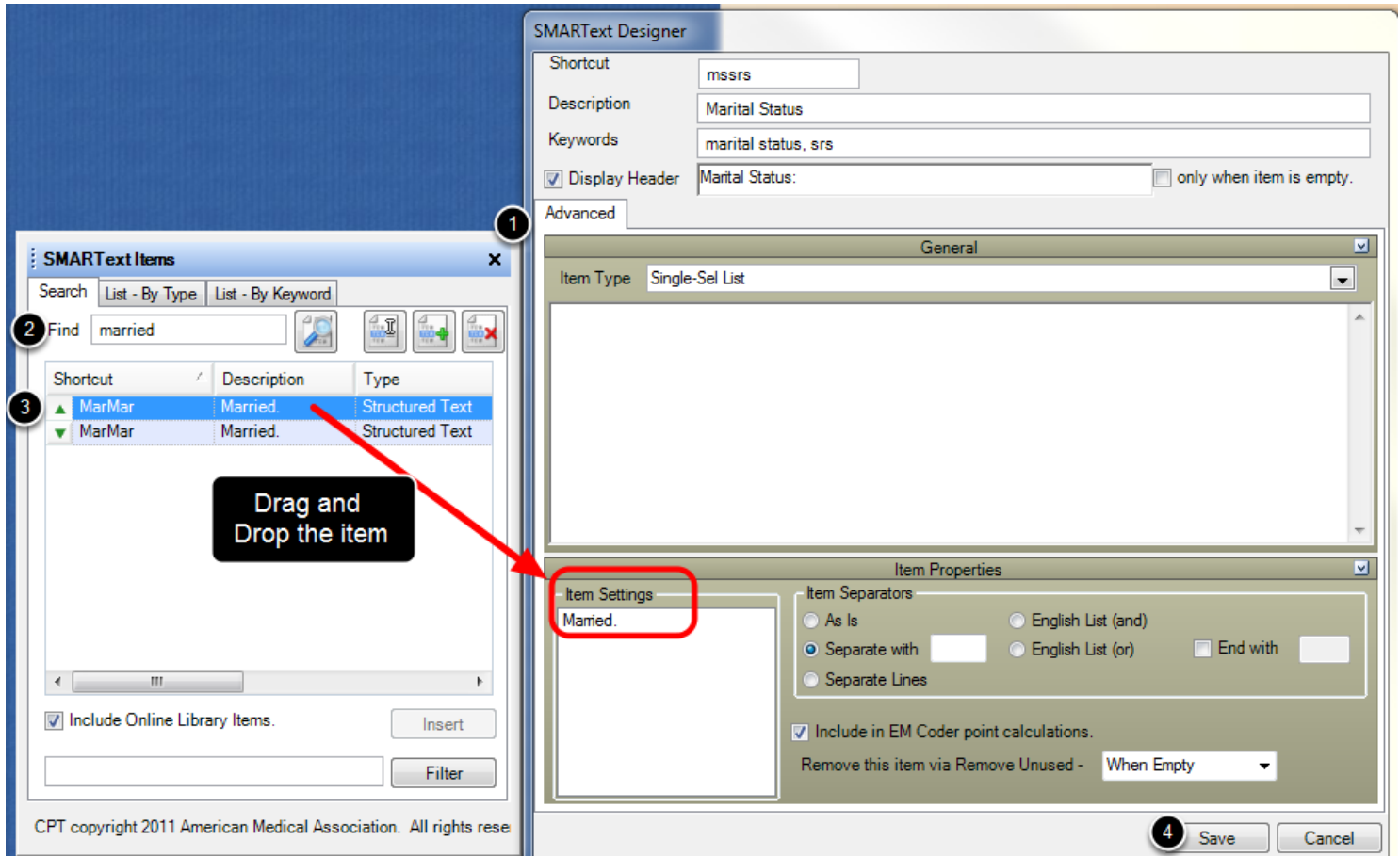
Step 4: SMARText Designer - Part 1

The screenshot shows the SMARText Designer window. The top section contains fields for 'Shortcut' (mssrs), 'Description' (Marital Status), and 'Keywords' (marital status, srs). Below these is a 'Display Header' section with a checked checkbox and the text 'Marital Status:'. To the right of this is an unchecked checkbox labeled 'only when item is empty.'. The bottom section is titled 'Advanced' and contains a 'General' tab. Under the 'General' tab, the 'Item Type' is set to 'Single-Sel List'. The main area below the 'Item Type' is a large empty text box.

Give the single select list an easy to remember shortcut, and a description. Within keywords, remember to include a unique keyword for easy retrieval purposes. Lastly, enter a display header which will display first in the documentation when the shortcut is entered and the spacebar is pressed.



Step 5: SMARText Designer - Part 2



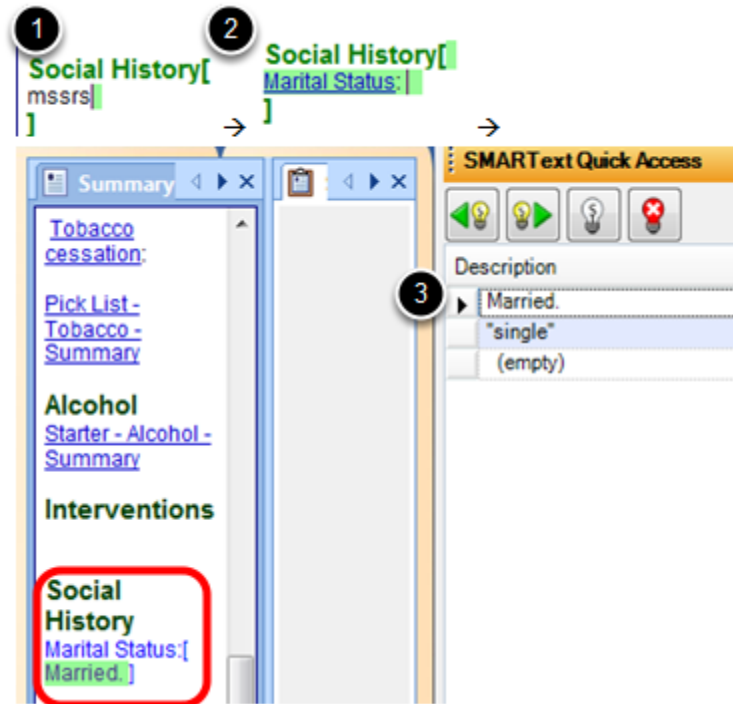
1. Drag the SMARText Designer to the right, and the SMARText Items Manager to the left of the screen.
2. Within the SMARText Items Manager, search for the structured items for this single select list--in this example--we searched for married.
3. Click to highlight the structured item, and drag and drop the item into the Item Settings box.

****Repeat steps 2 and 3 until all desired structured items are within the Item Settings box****

4. Click Save.



Step 6: Insert Single Select List



1. Insert the shortcut into the desired field and press the spacebar.
2. The display header will appear. Left-click on the display header.
3. The structured item choices will be available within SMARText Quick Access to the right of the screen. Select an item, and it will display in the documentation.

Since this item was created as a Single Select List, only one option will be able to be selected from the SMARText Quick Access window. If the user wishes to create a list where multiple items can be selected and inserted into the documentation, a Multi-Sel list will need to be created. For instructions, please see: [Creating SMARText Pick Lists](#).

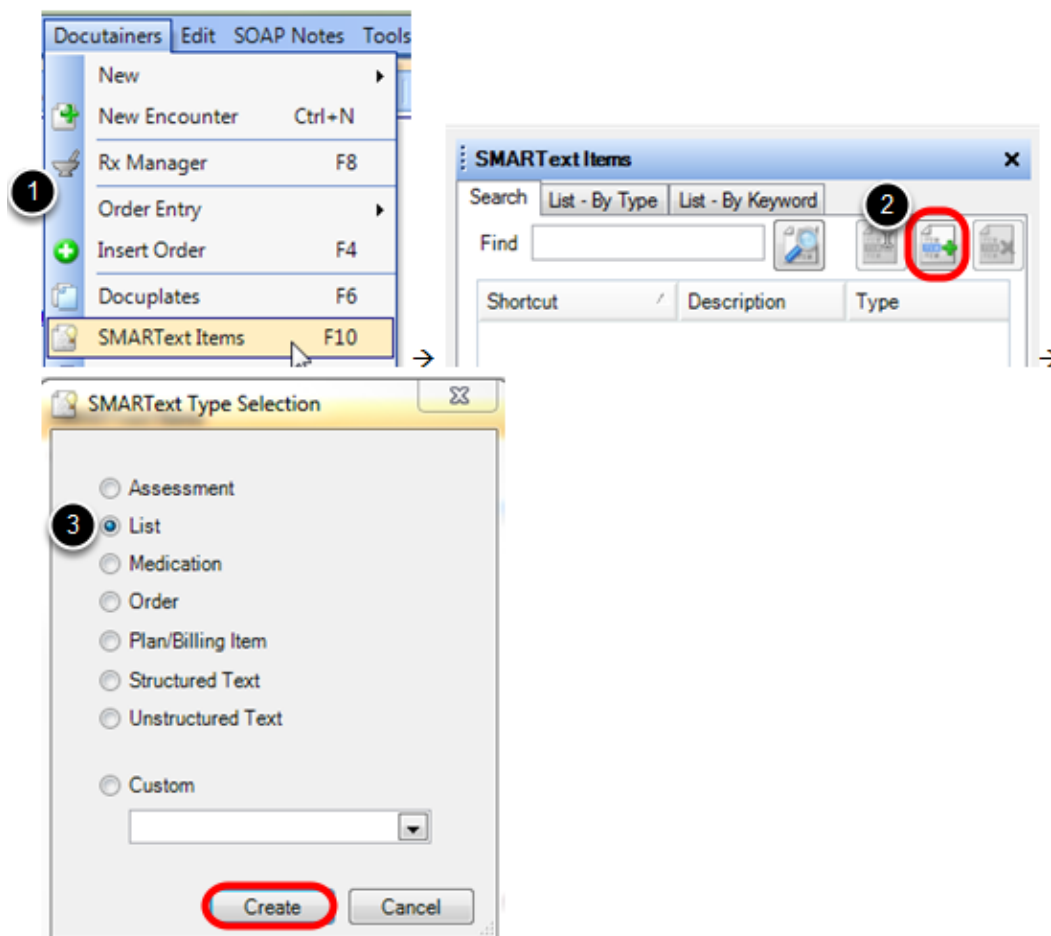


Create a Pick List Within a Pick List

Customized pick lists are one of the most efficient data entry methods. Creating custom pick lists that contain the items that a user commonly and repeatedly utilizes, allows data entry to be performed quickly and efficiently via a click for insertion into documentation.

Below are the steps necessary to create a pick list within a pick list. Our example we will build is a medication pick list comprised of various categories of medications a user might commonly prescribe to his/her patients.

Step 1 - Create Multiple Multi Sel Lists

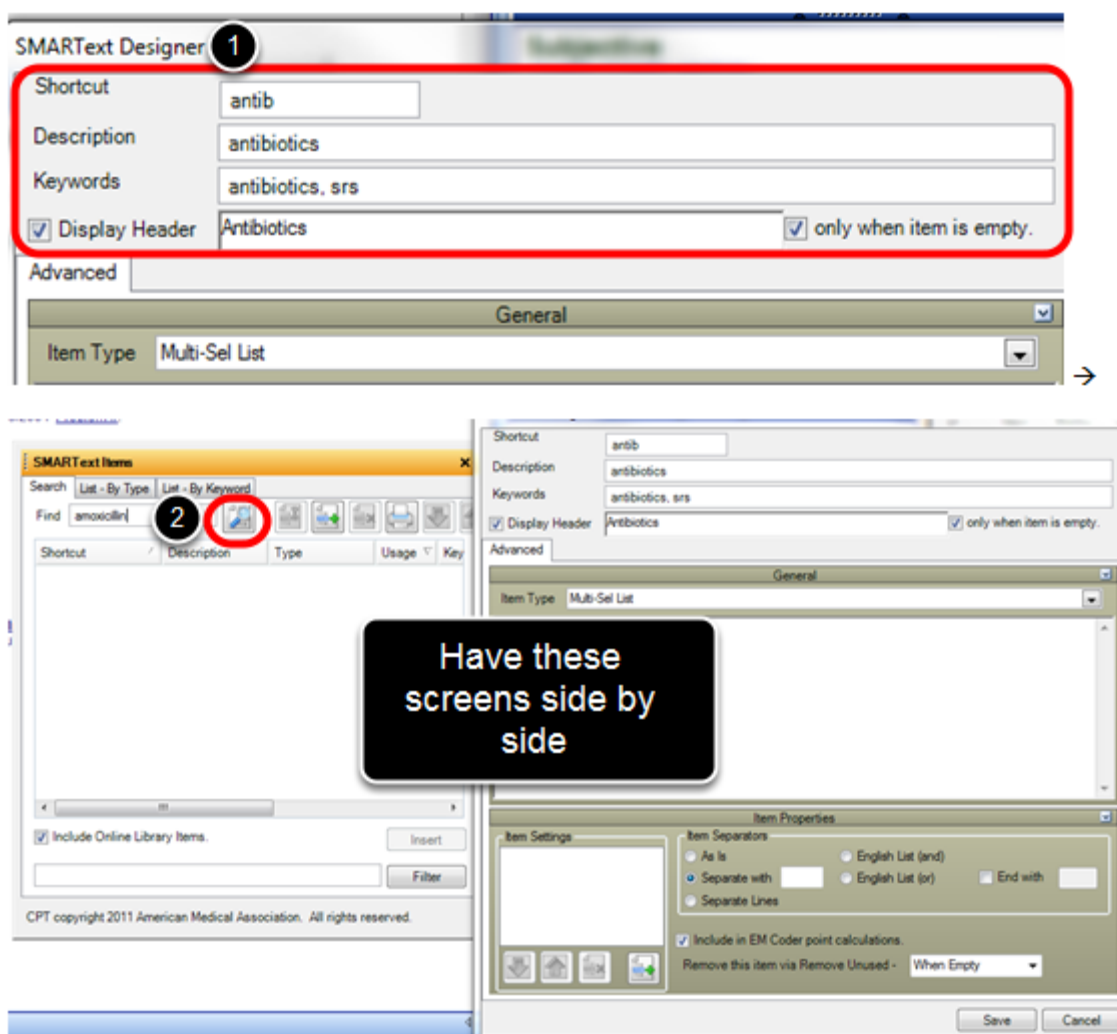


1. Open the SMARTText Items Manager by Clicking Docutainers > SMARTText Items or Clicking F10 on the keyboard.
2. Click on the green + to create a new item.



3. Within in the SMARText Type Selection box, Select "List" and Click Create.

Step 2 - SMARText Designer Part 1



1. Create a shortcut, description, keywords, and a display header.

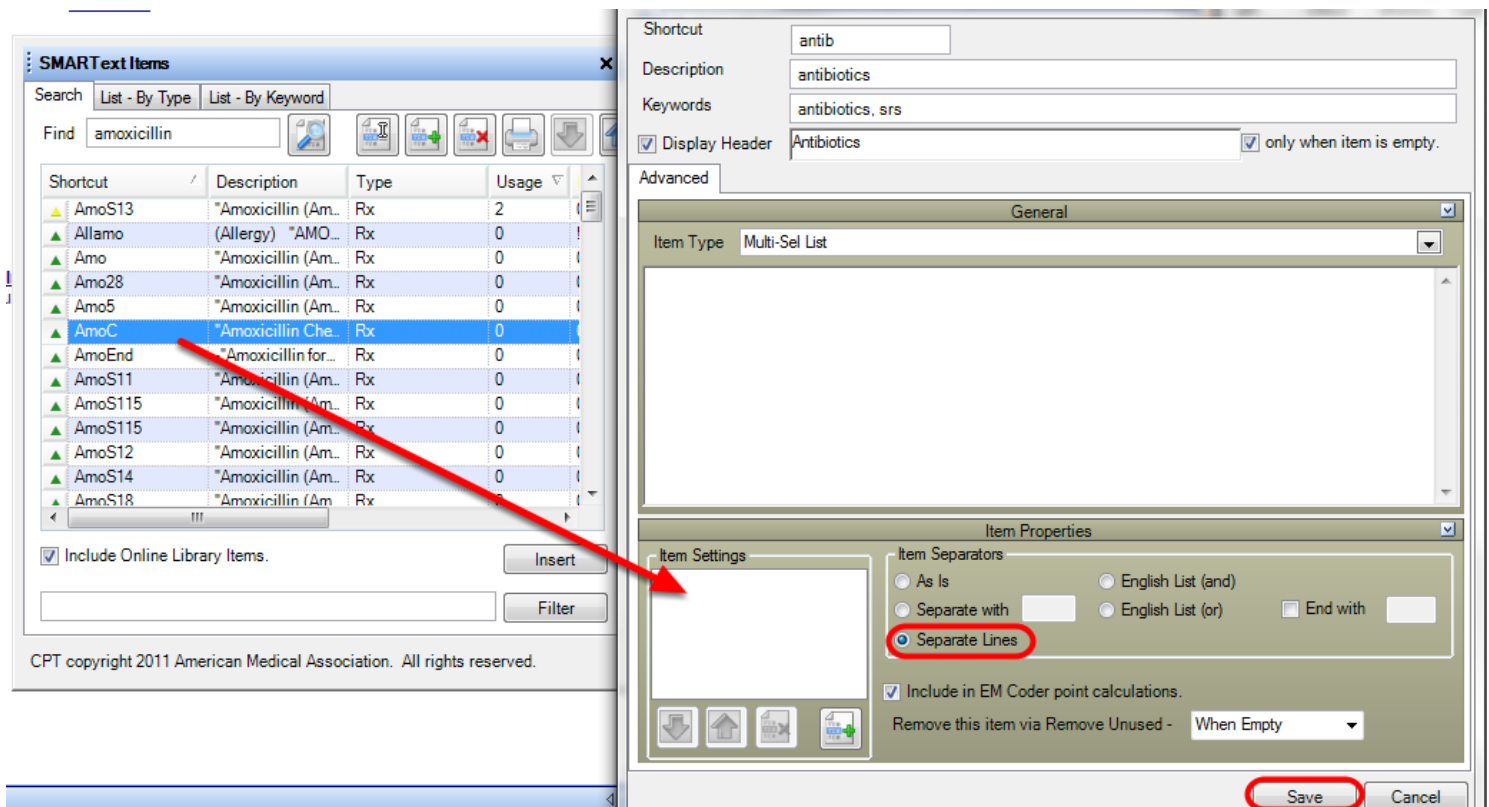
Tips: Create a short shortcut that is easy to recall. SOAPware also recommends to not use actual words or medical abbreviations, as others typing these words in notes would have these words expand on them each time they would hit the spacebar after typing the word or medical abbreviation.

Keywords--always include a unique keyword for easy retrieval purposes. Check the box next to "only when item is empty," by the display header.



2. Have the SMARText Designer to the right of the screen, and the SMARText Items Manager to the left of the screen. Type in the SMARText item and Click the Search button-in this example, a medication was typed in.

Step 3 - SMARText Designer Part 2



Drag and Drop each-in this case- medication into the Item Settings box within the SMARText Designer for this particular pick list. Click "Separate Lines: within the Item Properties box, so that if multiple medications are selected from this list, they will enter on separate lines within the documentation. Click Save when all items are in the pick list.

Tip: A SMARText item will not be able to be drag and dropped if the item is not downloaded onto the network-so make sure the item has a green triangle next to it. If not, it will be necessary to download the item first.

****Repeat searching for drugs in the SMARText Items Manager and dragging them to the Item Settings box within the SMARText Designer, until all items desired are in the pick list.****

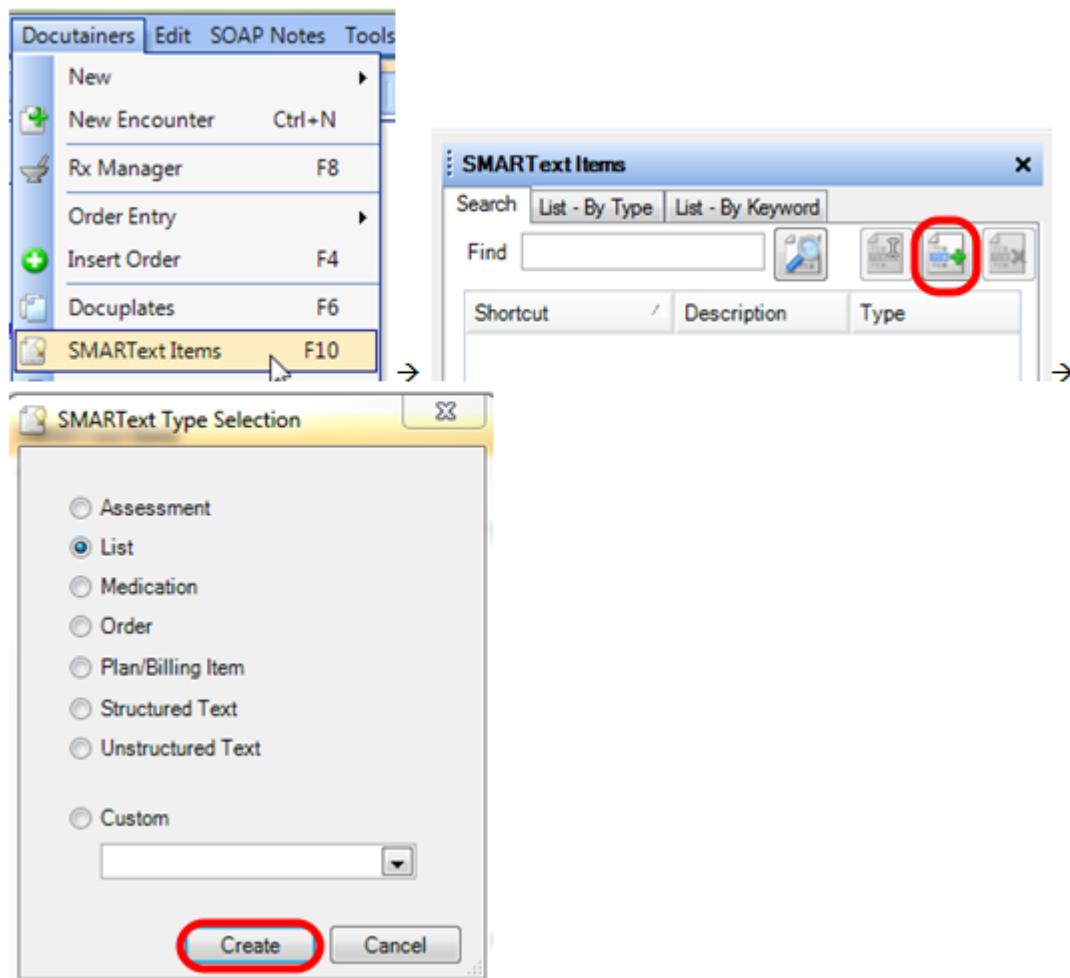


To see how to remove an item from the Item Settings box if need be, see the [Creating SMARText Pick Lists](#) lesson.

Repeat

Repeat Steps 1-3 for each pick list. In this example, a pick list was made for antibiotics as shown above, as well as Nsaids, BP meds, injectables, and Diabetic meds.

Step 4 - Create Master Multi Sel List

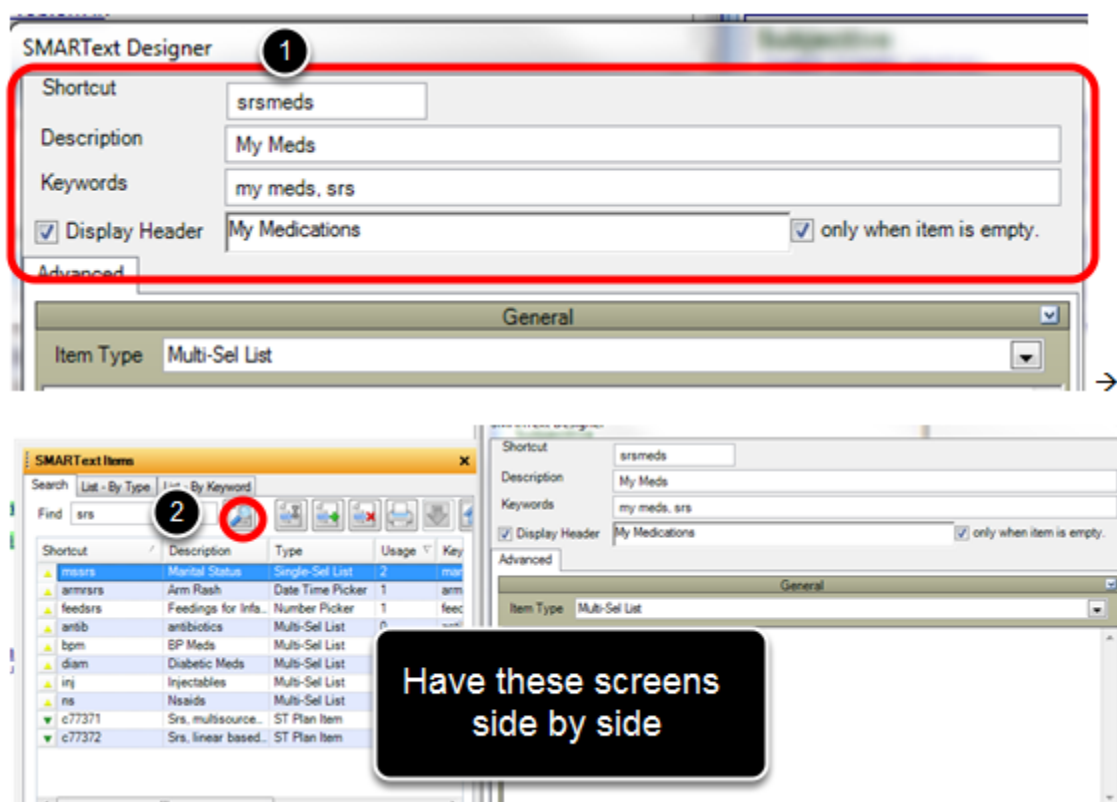


1. Open the SMARText Items Manager by Clicking Docutainers > SMARText Items or Clicking F10 on the keyboard.
2. Click on the green + to create a new item.



3. Within in the SMARText Type Selection box, Select "List" and Click Create.

Step 5 - SMARText Designer Part 3



1. Create a shortcut, description, keywords, and a display header.

Tips: Create a short shortcut that is easy to recall. For this example, this will be the shortcut that will be entered into the documentation. SOAPware also recommends to not use actual words or medical abbreviations, as others typing these words in notes would have these words expand on them each time they would hit the spacebar after typing the word or medical abbreviation. Keywords--always include a unique keyword for easy retrieval purposes. Check the box next to "only when item is empty," by the display header.

2. Have the SMARText Designer to the right of the screen, and the SMARText Items Manager to the left of the screen. Type in the SMARText item and Click the Search button-in this example, "srs" which is the unique keyword that has been entered for each pick list that has been created, was typed in.



Step 6 - SMARText Designer Part 4

The screenshot shows the SMARText Designer interface. On the left, the 'SMARText Items' panel displays a list of items. A red arrow points from the 'Injectables' item (Shortcut: inj, Description: Injectables, Type: Multi-Sel List) to the 'Item Settings' box in the 'Advanced' tab on the right. The 'Item Settings' box contains a list of items: antibiotics, Nsaids, and BP Meds. The 'Item Properties' box on the right shows the 'Separate Lines' option selected under 'Item Separators'. The 'Save' button is circled in red at the bottom right.

Shortcut	Description	Type	Usage	Key
mssrs	Marital Status	Single-Sel List	2	mar
armrsrs	Arm Rash	Date Time Picker	1	arm
feedsrs	Feedings for Infa...	Number Picker	1	feed
antib	antibiotics	Multi-Sel List	0	anti
bpm	BP Meds	Multi-Sel List	0	bp r
diam	Diabetic Meds	Multi-Sel List	0	diab
inj	Injectables	Multi-Sel List	0	inje
ns	Nsaids	Multi-Sel List	0	Nsa
c77371	Srs, multisource...	ST Plan Item	0	**N
c77372	Srs, linear based...	ST Plan Item	0	**N

Drag and Drop each-in this case- medication pick list, into the Item Settings box within the SMARText Designer for this particular pick list. Click "Separate Lines": within the Item Properties box, so that each medication selected from these lists, will enter on separate lines within the documentation. Click Save when all items are in the pick list.

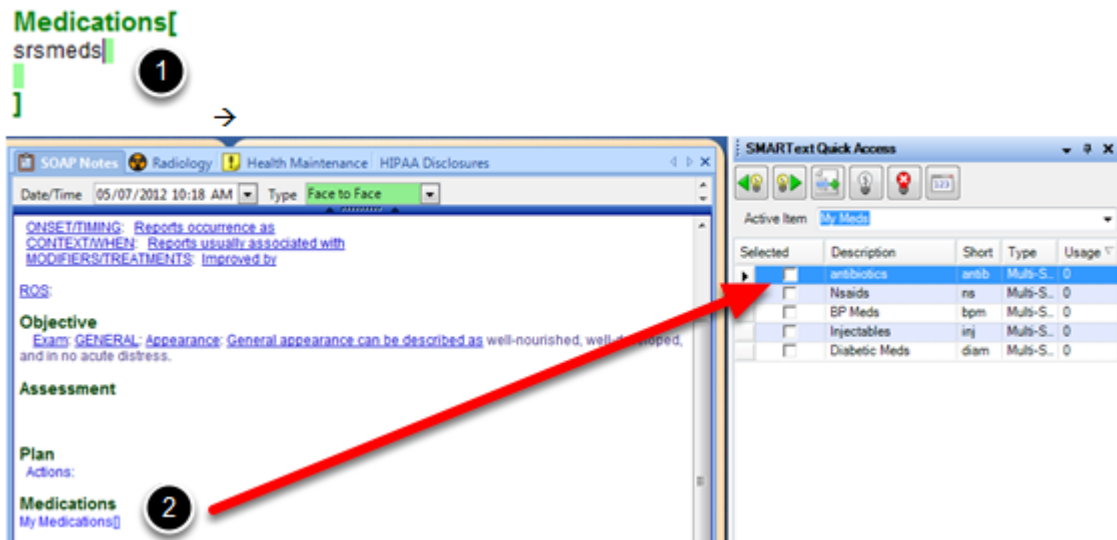
Tips: A SMARText item will not be able to be drag and dropped if the item is not downloaded onto the network-so make sure the item has a green triangle next to it. If not, it will be necessary to download the item first. Also, drag and drop each pick list into the Item Settings box in the order in which you would prefer them to display in the documentation.

****Continue to drag and drop each pick list into the Item Settings box within the SMARText Designer, until all pick lists are within the master pick list.****

To see how to remove a pick list from the Item Settings box if need be, see the [Creating SMARText Pick Lists](#) lesson.



Step 7 - Enter Master Pick List into Documentation



1. Type in master pick list shortcut followed by hitting the spacebar on the keyboard, or Click F11 if this is the initial insert of this pick list.
2. The Display Header for the master pick list will be inserted into the documentation. To the right of the screen within SMARText Quick Access, the user will see a list of all the other pick lists within the master pick list.



Step 8 - SMARText Quick Access

SOAP Notes | Radiology | Health Maintenance | HIPAA Disclosures

Date/Time: 05/07/2012 10:18 AM | Type: Face to Face

ONSET/TIMING: Reports occurrence as
CONTEXT/WHEN: Reports usually associated with
MODIFIERS/TREATMENTS: Improved by

ROS:

Objective
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

Assessment

Plan
Actions:

Medications
Antibiotics
Nsaids
BP Meds
Injectables
Diabetic Meds

SMARText Quick Access

Active Item: My Meds

Selected	Description	Short	Type	Usage
<input checked="" type="checkbox"/>	antibiotics	antib	Multi-S...	0
<input checked="" type="checkbox"/>	Nsaids	ns	Multi-S...	0
<input checked="" type="checkbox"/>	BP Meds	bpm	Multi-S...	0
<input checked="" type="checkbox"/>	Injectables	inj	Multi-S...	0
<input checked="" type="checkbox"/>	Diabetic Meds	diam	Multi-S...	0

Select each pick list to be entered, within SMARText Quick Access. Remember, a user can de-select a pick list within SMARText Quick Access if he/she desires.



Step 9 - Select Medications from Various Pick Lists

The screenshot shows the SOAPware interface. The main window displays a SOAP note with the following sections:

- SOAP Notes** (Radiology, Health Maintenance, HIPAA Disclosures)
- Date/Time:** 05/07/2012 10:18 AM
- Type:** Face to Face
- ONSET/TIMING:** Reports occurrence as
- CONTEXT/WHEN:** Reports usually associated with
- MODIFIERS/TREATMENTS:** Improved by
- ROS:**
- Objective**
 - Exam:** GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.
- Assessment**
- Plan**
 - Actions:**
- Medications**
 - Augmentin XR (Amoxicillin/Clavulanate): [Strength- 1000 mg-62.5 mg (tablet)]
 - SIG- Dose- 2 each Freq- 2 times a day Route- orally
 - Dispense- #40 Substitutions- Substitutions Allowed Refills- 0
 - Nsaids
 - BP Meds
 - Injectables[]
 - Diabetic Meds

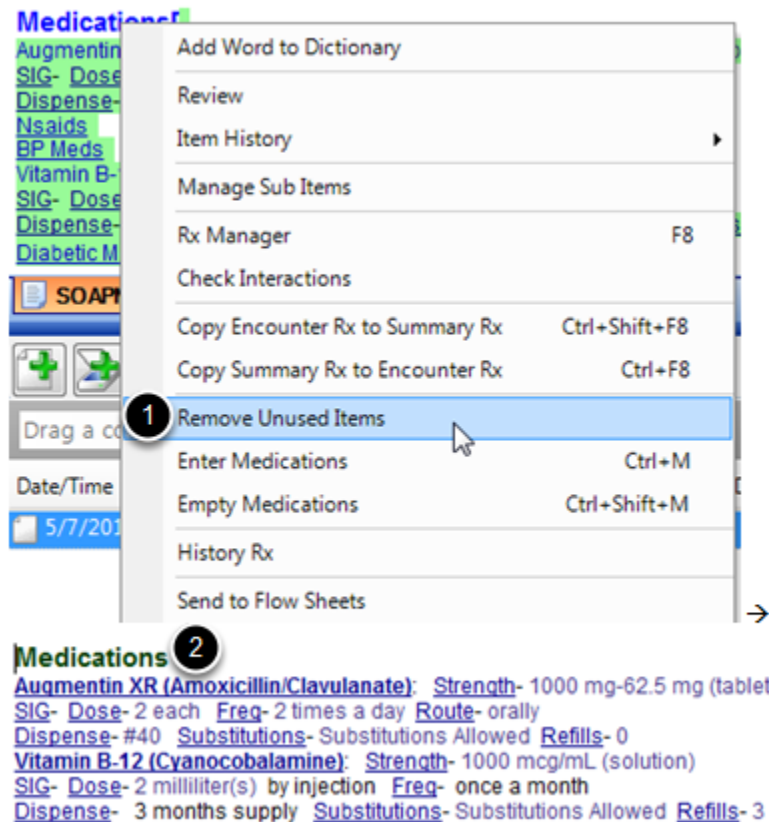
The **SMARText Quick Access** window is open on the right, showing a table of medications:

Selected	Description	Short	Type	Usage
<input checked="" type="checkbox"/>	Aristocort Forte		Rx	1
<input type="checkbox"/>	"Vitamin B-12 (Cyan...	VB12I	Rx	0
<input type="checkbox"/>	"Dexamethasone (...)	Dex4...	Rx	0

Left-Click once on a pick list display header to display all the SMARText items within the pick list. Select as many medications-in this case-from within SMARText Quick Access, which will then display within the designated field in the documentation. A user can always de-select an item by unchecking its box within SMARText Quick Access.



Remove Unused Items



1. Right-Click on the field header, in this example, Medications, and Select "Remove Unused Items."
2. Only the medications or items that were selected for this particular patient will display in the field-meaning the display headers for pick lists that were not used on a patient, will be removed from the documentation.

Additional Information

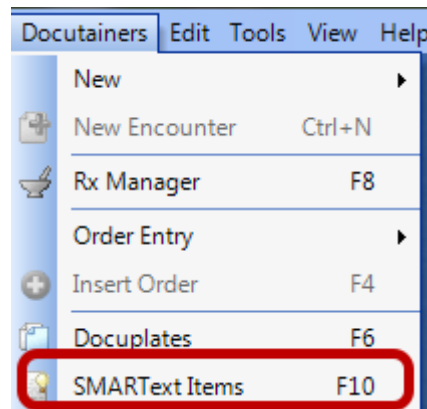
For more information on pick lists in general, see: [SMARText Items in Pick Lists](#) and [Editing Pick Lists](#).



Create a Date Time Picker SMARTText Item

Auser would utilize the Date Time Picker SMARTText item type if he/she wanted to document information that could be best displayed with a particular date or time.

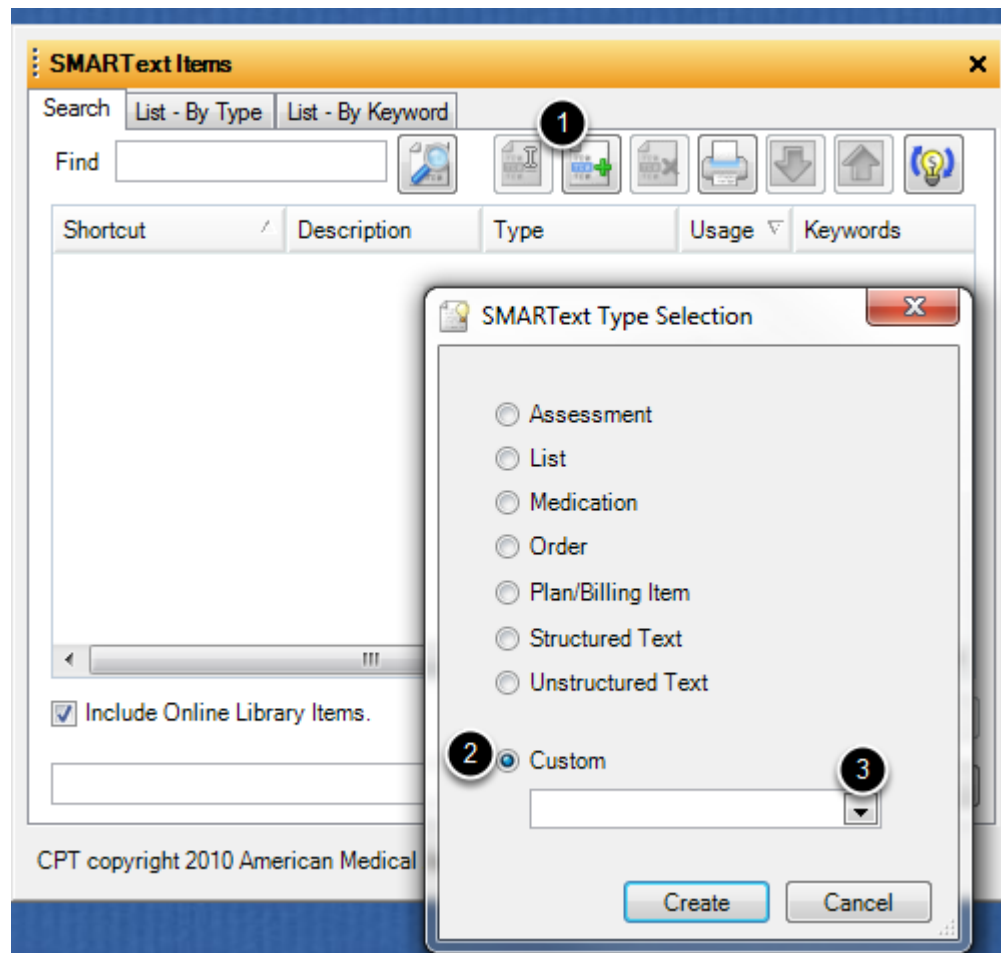
Access the SMARTText Manager



Go to Docutainers > SMARTText Items. Auser can also press F10 on the keyboard.

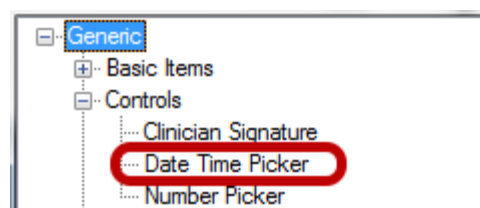


SMARText Type Selection



1. Press the Create a new SMARText item button.
2. Fill in the radio button next to Custom.
3. Click on the drop-down arrow.

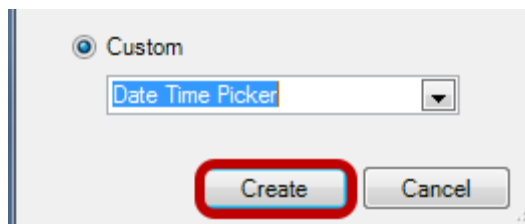
Drill Down



Click on the + next to Generic, as well as the + next to Controls. Double-click on Date Time Picker.

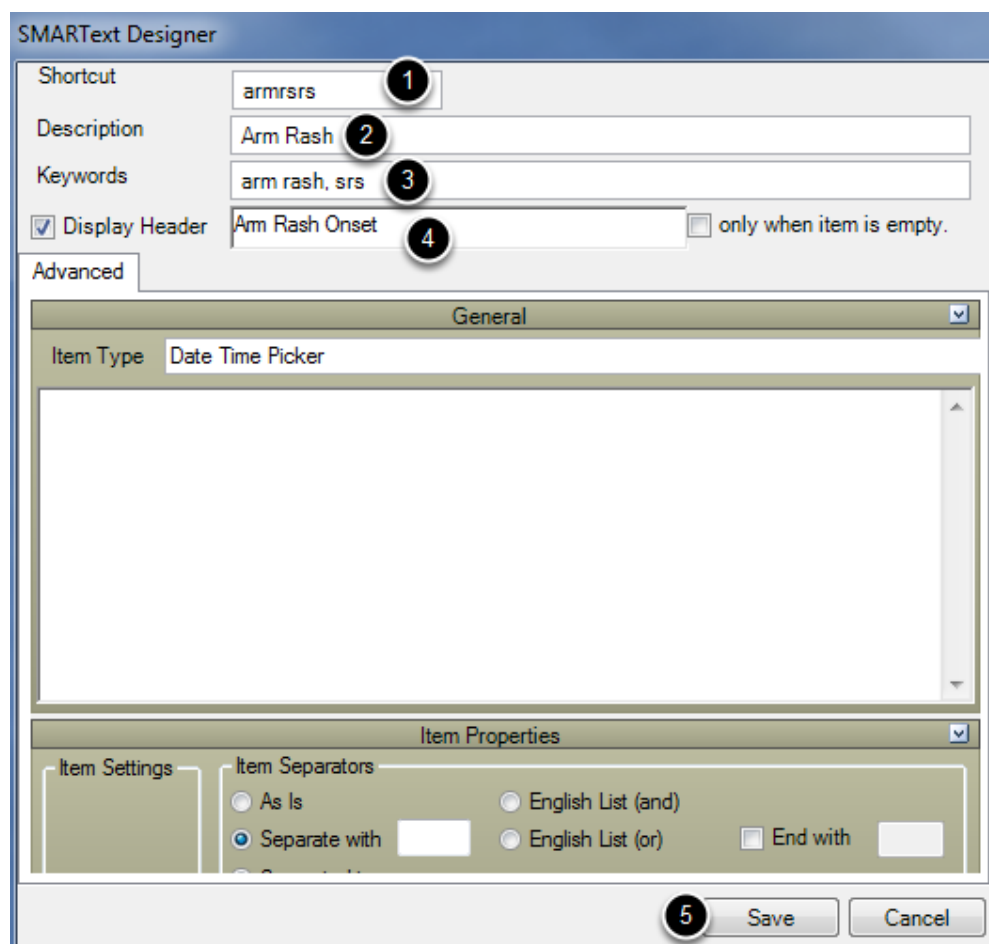


Create



Click Create.

SMARText Designer



1. Assign this SMARText Item a shortcut. (user will need to make sure this shortcut is not too long, is not a real word, and has a unique identifier--in this example, initials are attached to, "armr," and easy to remember).



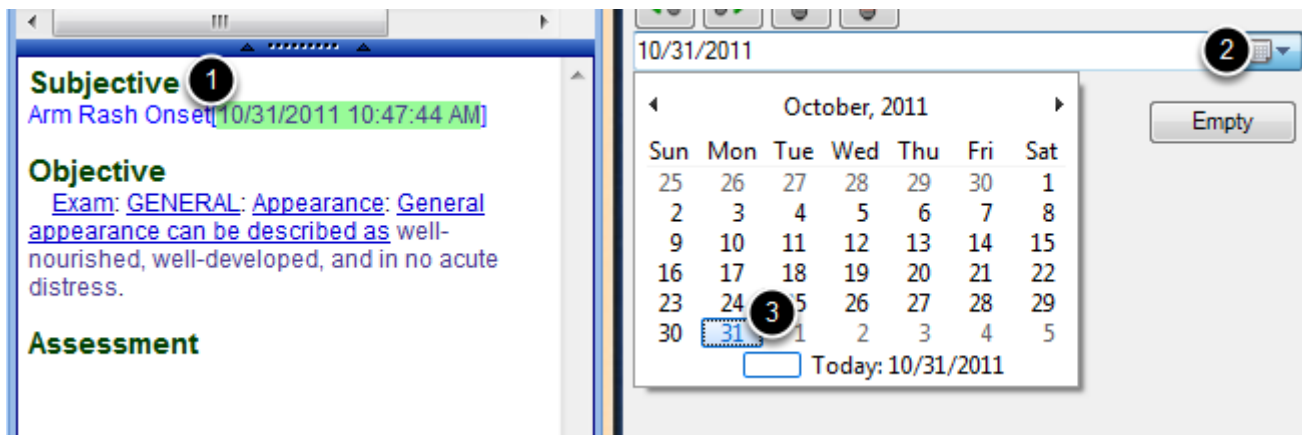
2. Assign a description.
3. Assign keywords. (user will need to make sure he/she includes a unique keyword--in this example, the initials 'srs' is the unique identifier. This will help with searching for this SMARTText item in the future).
4. Assign the SMARTText item a display header. The words typed in this box will display within the encounter notes.
5. Click Save.

Insert Shortcut

Subjective[
armr**srs]**

With a patient's chart open, and an encounter note field active, type the shortcut assigned to the Date Time Picker SMARTText item, and press the spacebar on the keyboard.

Use the Date Time Picker SMARTText Item



Notice that once the shortcut was entered and the spacebar was pressed, the text entered into the note is the Display Header.

1. Single-click on the display header.



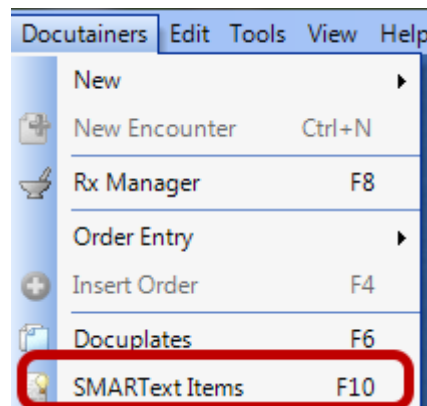
2. Click the drop-down arrow to display the calendar.
3. Select a date from the calendar displayed in the SMARText Quick Access (which is mostly likely docked to the right of a user's screen). The current time will also display within the note, next to the date selected.



Create a Number Picker SMARTText Item

This lesson will take a user through the steps necessary to create a Number Picker SMARTText item. A user would utilize the Number Picker SMARTText item type if he/she wanted to document information that could be best displayed with a number.

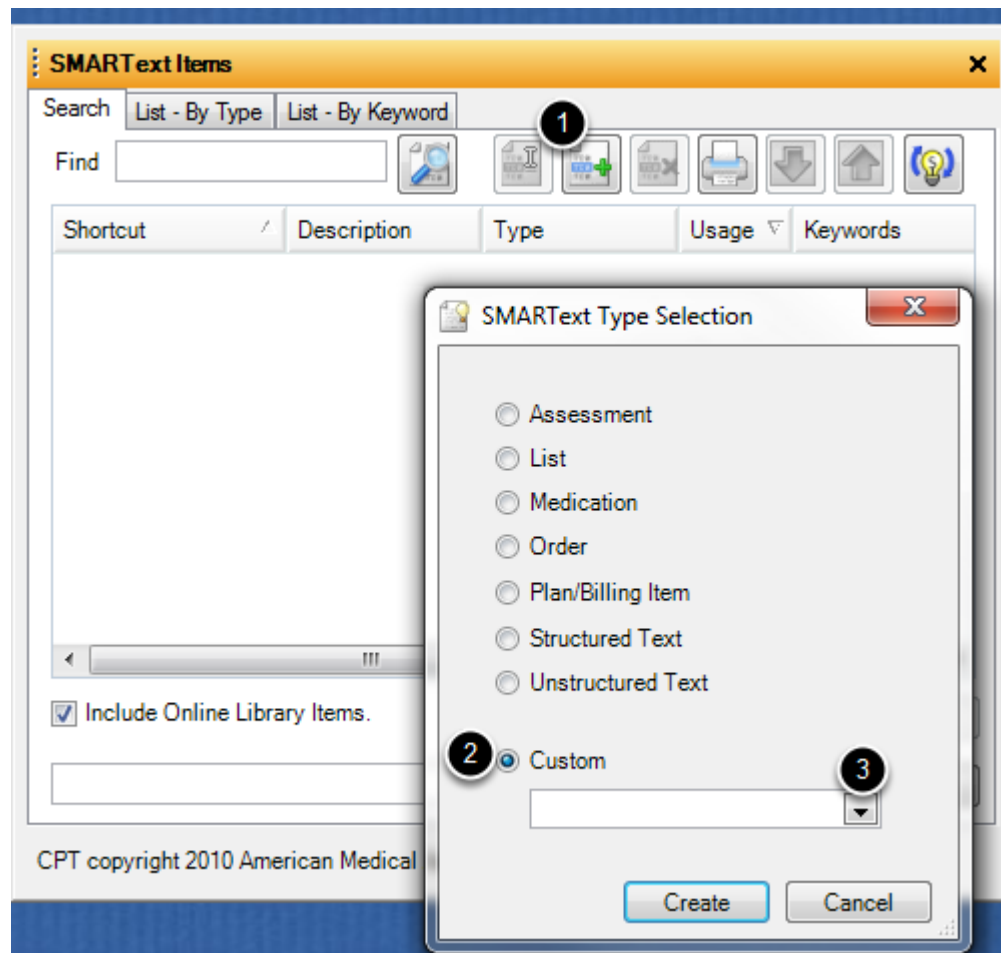
Access the SMARTText Manager



Go to Docutainers > SMARTText Items. A user can also press F10 on the keyboard.

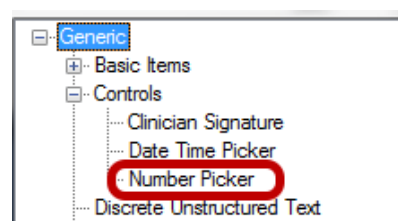


SMARText Type Selection



1. Press the Create a new SMARText item button.
2. Fill in the radio button next to Custom.
3. Click on the drop-down arrow.

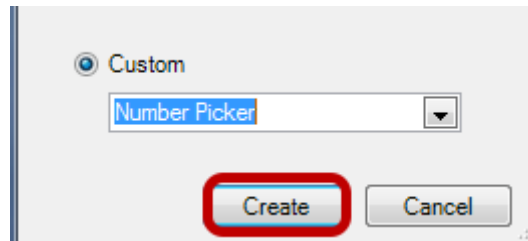
Drill Down



Click on the + next to Generic, as well as the + next to Controls. Double-click on Number Picker.

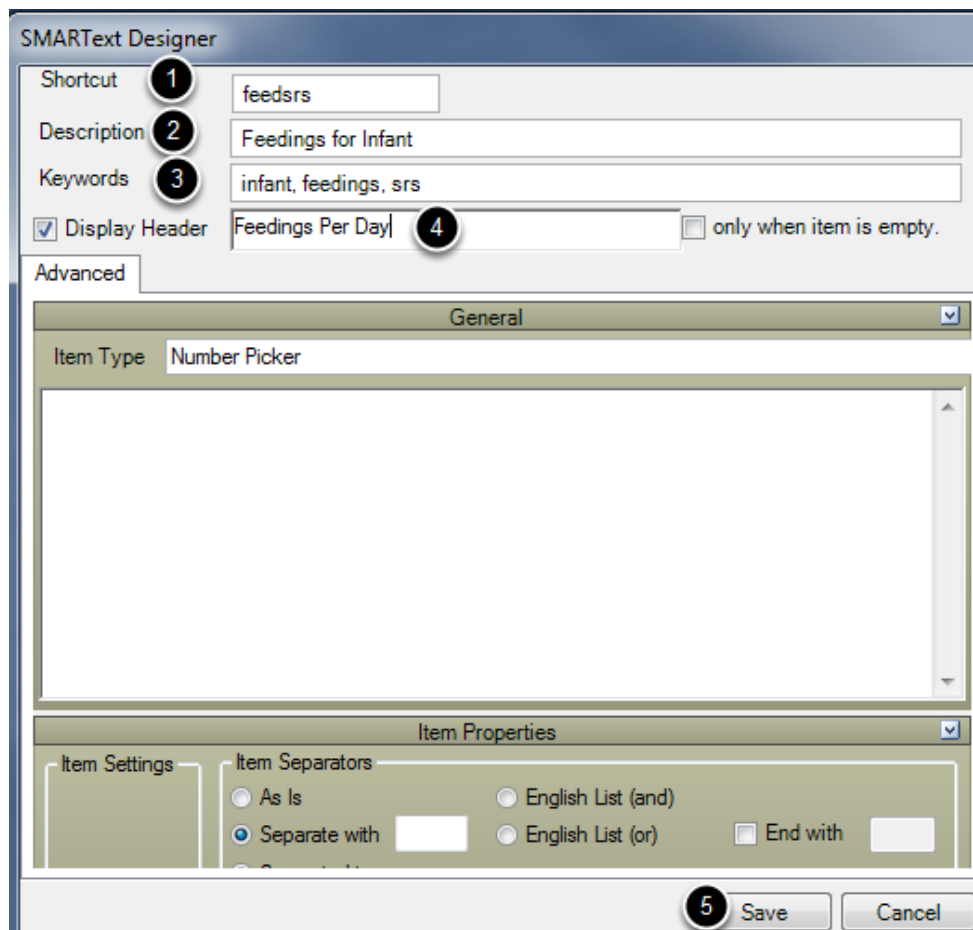


Create



Click Create.

SMARText Designer



1. Assign this SMARText Item a shortcut. (user will need to make sure this shortcut is not too long, is not a real word, and has a unique identifier--in this example, initials are attached to the word, "feed," and easy to remember).



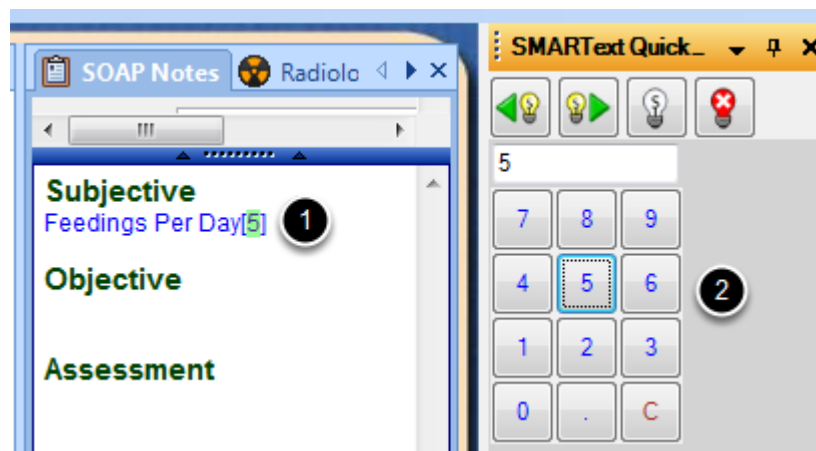
2. Assign a description.
3. Assign keywords. (user will need to make sure he/she includes a unique keyword--in this example, the initials 'srs' is the unique identifier. This will help with searching for this SMARTText item in the future).
4. Assign the SMARTText item a display header. The words typed in this box will display within the encounter notes.
5. Click Save.

Insert Shortcut

Subjective[
feeders|
1

With a patient's chart open, and an encounter note field active, type the shortcut assigned to the Number Picker SMARTText item, and press the spacebar on the keyboard.

Use the Number Picker SMARTText Item



Notice that once the shortcut was entered and the spacebar was pressed, the text entered into the note is the Display Header.



1. Single-click on the display header.
2. Select a number from the number pad displayed in the SMARText Quick Access (which is mostly likely docked to the right of a user's screen).



Creating Toggles

Creating Toggles is an advanced functionality in SOAPware.

Before a user would create his/her own toggles the user should:

1. Have an understanding of what a Toggle is and how it functions.
2. Have a basic knowledge of SMARText including creating macros and pick lists.

Please Note: Toggle SMARText Items are NOT EM Coder compatible.



Anatomy of the Finished Toggle

SMARTText Designer

Shortcut:

Description:

Keywords:

☒ Display Header: ☐ only when item is empty.

Advanced

Item Type:

MODIFIERS/TREATMENTS: Has tried
Has avoided
Improved by
History of
Past evaluation and/or work-up includes
+++++ [none/nothing | Last ophthalmological exam was- | has not had ophthalmological exam | no previous work-up or evaluation for this | abstinence | analgesic | recent antibiotics | antihistamine | blood test | bronchodilator | chiropractor | Chloraseptic | CT Scan | decongestant | ear drops | exercise | hypertension | ice | inhaled corticosteroid | massage | MRI | practicing good foot care (and this was discussed-reviewed) | not practicing good foot care (this was discussed and reviewed) | oral corticosteroid | OTC cough/decongestant | OTC Nasal Spray use | Physical therapy | psychiatric evaluation/treatment |]

Item Settings

"Has tried" (MODIFIERS/TREATMENTS)
"Has avoided" (MODIFIERS/TREATMENTS)
"Improved by" (MODIFIERS/TREATMENTS)
"History of" (MODIFIERS/TREATMENTS)
"Past evaluation and/or work-up includes" (MODIFIERS/TREATMENTS)
+++++ (SMARTips) MODIFIERS/TREATMENTS

Item Separators

As Is

End with

Coding / Notes

Structure Viewer

Save Cancel

Header that will display in SOAP Note

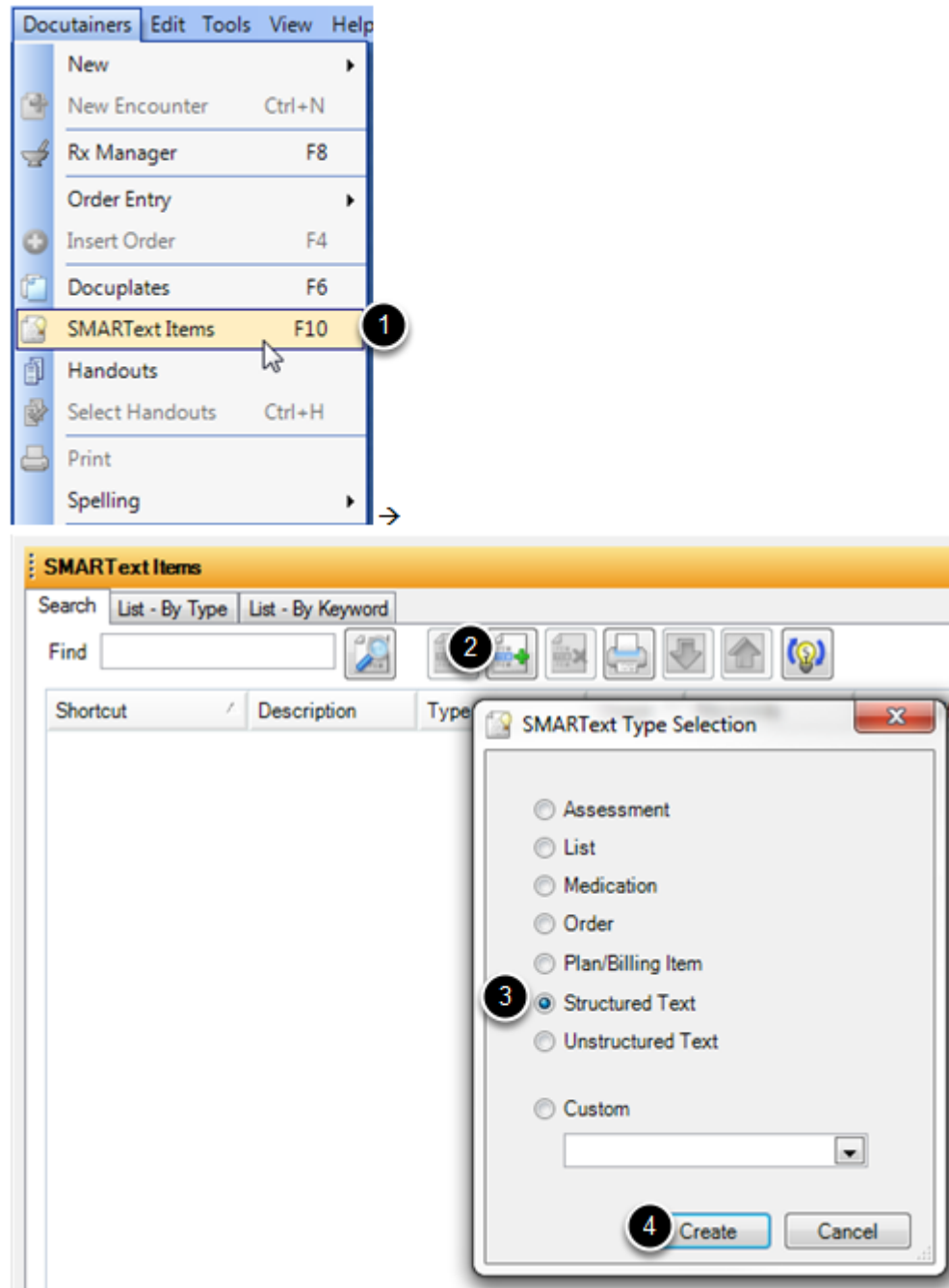
Main item type to house all our toggle multi-sel lists

Each pick list and item cluster can be placed into this main toggle multi-sel list so that when combined, can be inserted into the documentation using one shortcut code

The screen shot above depicts a finished toggle, and its components.



Step 1 - Create Structured Text Items



Toggles are created "from the ground up," meaning, the user is to first create each component prior to putting the toggle together as a whole.

Structured Text SMARTText items will be the components that will be used to "toggle" between, in the user's documentation.



1. Click on Docutainers > SMARText Items. (or Click F10 on the keyboard)
2. Click on the green plus within the SMARText Items Manager.
3. Select "Structured Text."
4. Click Create.

SMARText Designer: Structured Item

For demonstration purposes, we will create a fruit toggle, that will allow us to report what fruits are our favorites, and what fruits we deny that we like.

We are currently creating our individual fruits, which will serve as our structured text, or the components of our toggle.



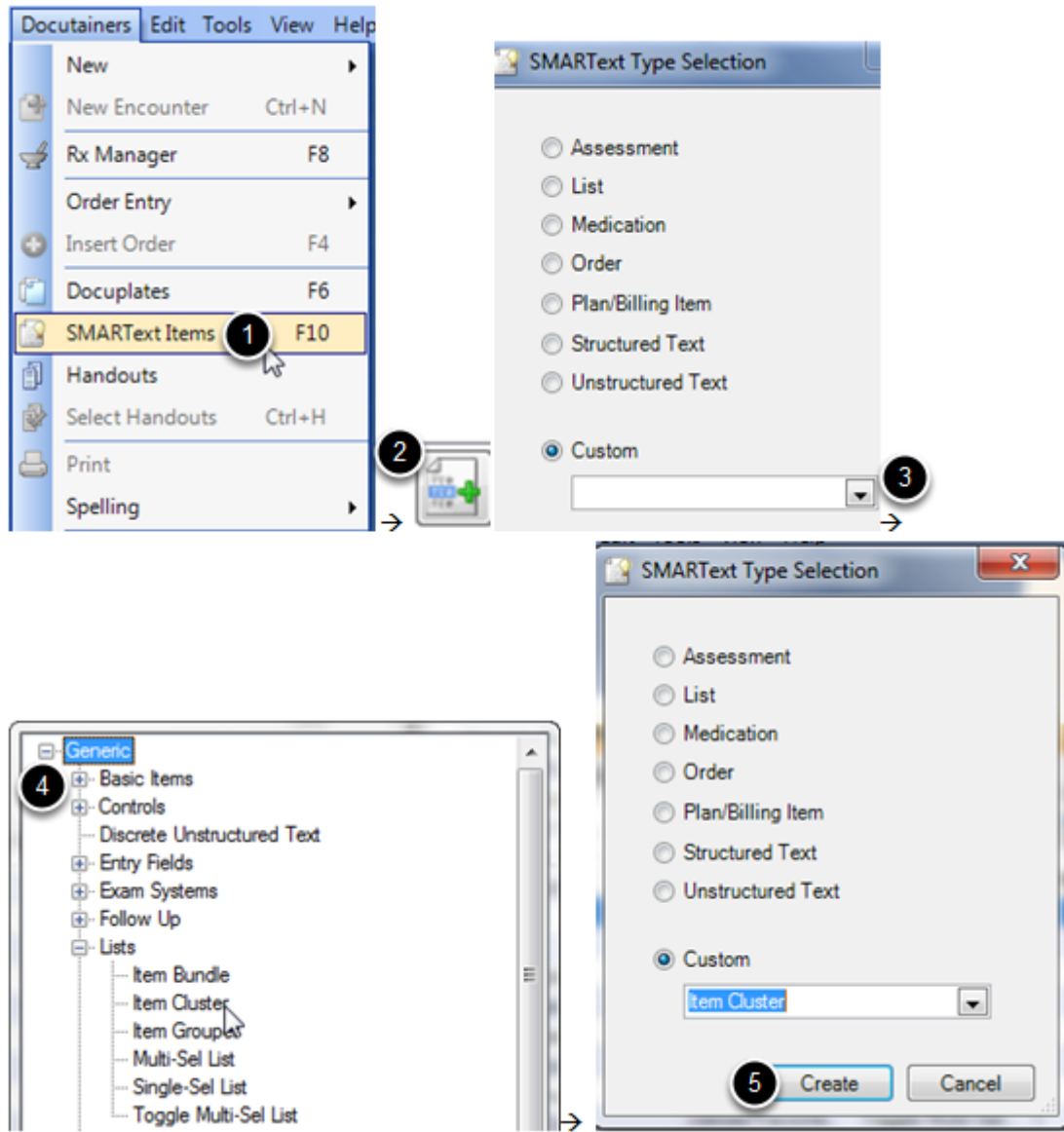
****Structured items do not require or need a shortcut****

1. Give the item a description.
2. Give the item keywords. (all keywords need to be separated by a comma and space and be sure to have a unifying keyword that will be used for quick retrieval of all a user's SMARTText created items)
3. In the Item Settings box, under Text (Singular), type the word or words to be displayed in the documentation.
4. Click Save.

Repeat steps 1-4 for each Structured Item.



Step 2 - Create an Item Cluster



An Item Cluster combines all our previously made Structured items into one SMARTText item group, which eliminates individual dragging and dropping of each item.

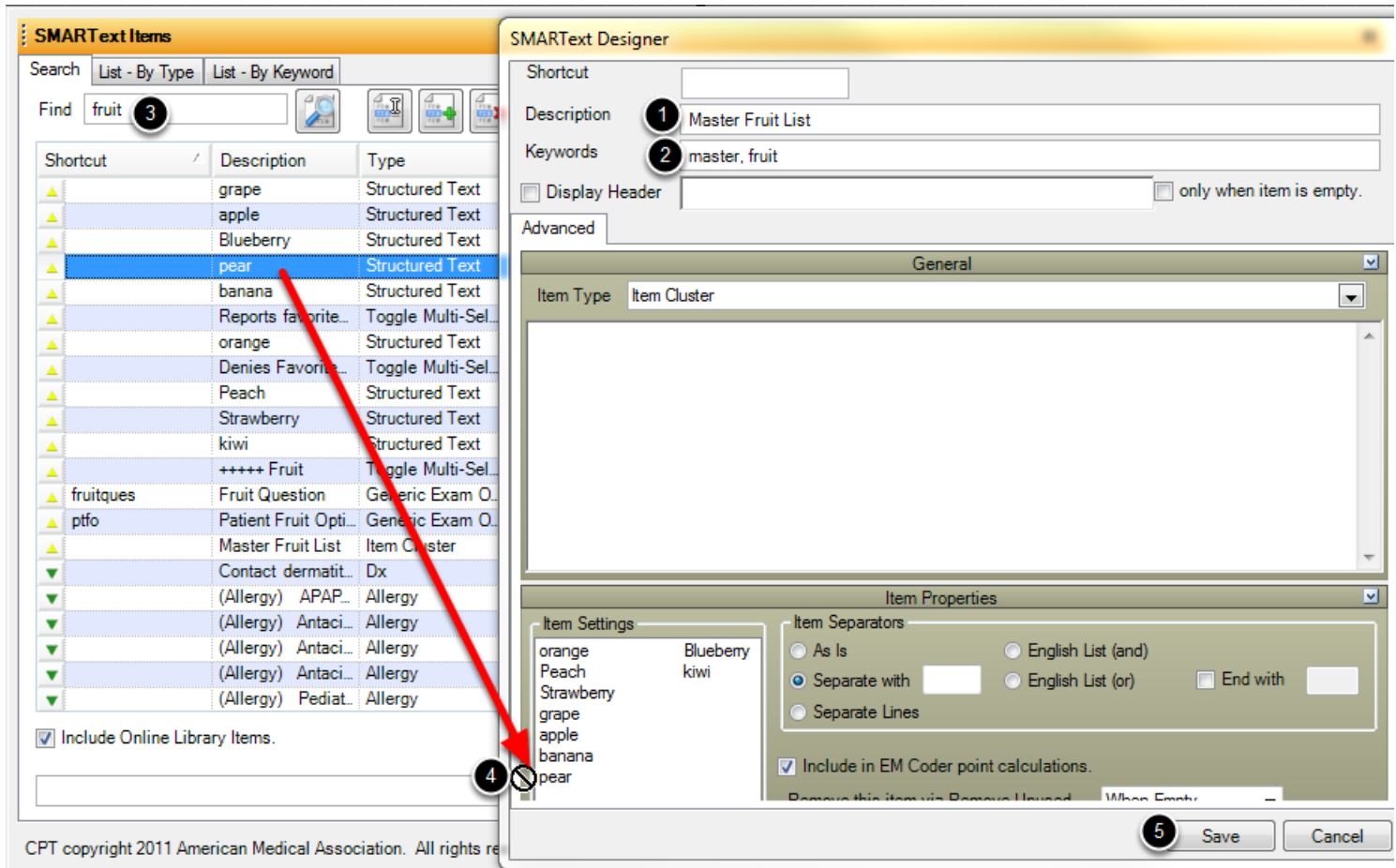
1. Click on Docutainers > SMARTText Items. (or Click F10 on the keyboard)
2. Click on the green plus within the SMARTText Items Manager.
3. Click "Custom" and Click on the drop-down arrow.
4. Click on the + (expander node) next to Generic. Then Click on the + next to Lists, and



Double-click on Item Cluster.

5. Click Create.

SMARText Designer: Item Cluster



****An Item Cluster does not require or need a shortcut****

1. Give Item Cluster a description.
2. Give Item Cluster keywords. (all keywords need to be separated by a comma and space and be sure to have a unifying keyword that will be used for quick retrieval of all a user's SMARText created items)

Drag the SMARText Items Manager to the left side of the screen and the SMARText Designer to the right side of the screen.

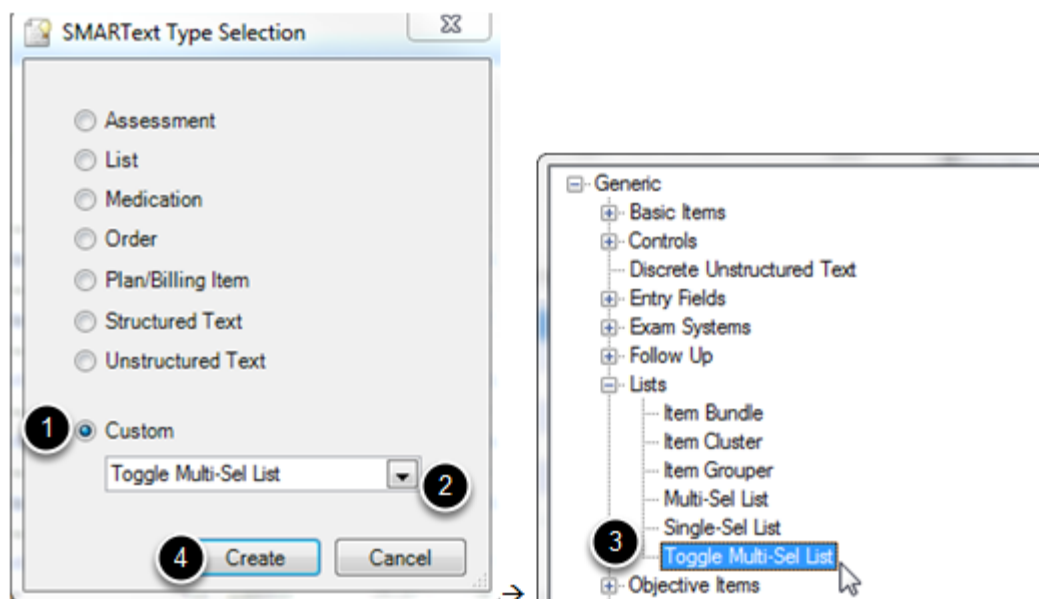


3. In the SMARText Items Manager, type in the unifying keyword of the structured items for quick retrieval. In this case, our unifying keyword is, fruit.
4. One at a time, Click to highlight, then drag and drop each individual structured item into the Item Settings box within the SMARText Designer. The user will see a circle with a line through it--while holding a left-click of the mouse--until the user sees an arrow, meaning he/she is in the clear to release the left-click, and the structured item will be placed into the Item Cluster.

Repeat step 4 until all structured items are placed within the Item Settings box within the SMARText Designer.

5. Click Save.

Step 3 - Create a Toggle Multi-Sel List



It is time to create a Toggle Multi-Sel SMARText item for each header the user wants the structured items he/she previously built in this lesson, to toggle between while documenting. For this example, we are going to create a toggle multi-sel list for "Reports favorite fruit as." A user could also create another list for what the patient denies. Users could even create lists for positive findings, as well as one for negative findings.

Unseen in the screen shot above...Click on Docutainers on the menu bar, and Select SMARText Items. Click on the green plus within the SMARText Items Manager.



1. Click on the radio button next to "Custom."
2. Click on the drop-down arrow.
3. Click on the + (expander node) next to Generic. Then Click on the + next to Lists, and Double-click on Toggle Multi-Sel List.
4. Click Create.

SMARText Designer: Toggle Multi-Sel List

The screenshot displays the SMARText Designer interface. On the left, the 'SMARText Items' list shows various items, with 'Master Fruit List' selected (indicated by a red arrow and a circled '5'). The main window shows the configuration for this item. The 'Description' field (1) contains 'Reports favorite fruit as'. The 'Keywords' field (2) contains 'reports, favorite, fruit'. The 'Display Header' checkbox is checked, and the header text (3) is 'Reports Favorite Fruit as:'. The 'Item Type' is set to 'Toggle Multi-Sel List'. The 'Item Properties' section shows 'Item Settings' with 'Master Fruit List' and 'Item Separators' with 'Separate Lines' selected. The 'Remove this item via Remove Unused' checkbox (6) is checked, and the 'When Empty' dropdown is highlighted with a red box. The 'Save' button (7) is at the bottom right.

****A Toggle Multi-Sel List does not require or need a shortcut****

1. Give the list a description.
2. Give the list keywords. (all keywords need to be separated by a comma and space and be sure to have a unifying keyword that will be used for quick retrieval of all a user's SMARText created items)



3. Give the list a Display Header. The header will be what displays within the documentation.

Drag the SMARTText Items Manager to the left side of the screen and the SMARTText Designer to the right side of the screen.

4. In the SMARTText Items Manager, type in the unifying keyword of the item cluster we made previously, for quick retrieval. In this case, our unifying keyword is, fruit.

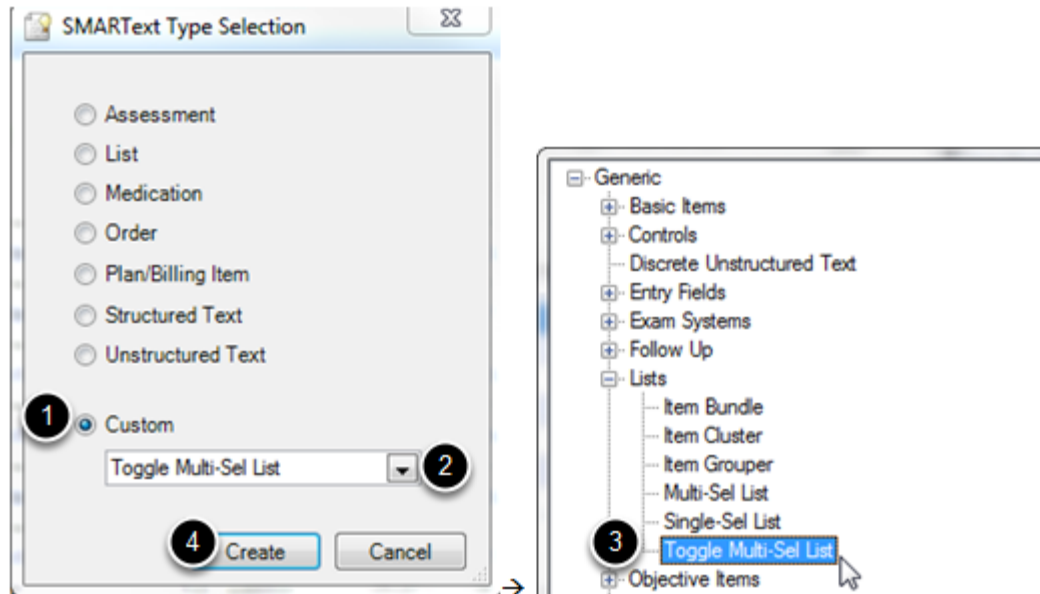
5. Click to highlight, then drag and drop the item cluster into the Item Settings box within the SMARTText Designer. The user will see a circle with a line through it-while holding a left-click of the mouse--until the user sees an arrow, meaning he/she is in the clear to release the left-click, and the item cluster will be placed into the Toggle Multi-Sel list.

6. Under "Remove this item via Removed Unused," Select "When Empty."

7. Click Save.

Repeat steps 1-7 for the next Toggle Multi-Sel List-such as "denies favorite fruit as."

Step 4 - Create a SMARTips Toggle Multi-Sel List



ASmartips Toggle Multi-Sel list will always be the final multi-sel list created in this process. The user will use SMARTips, as his/her display header, and this list will function as a holding place for all toggle items.

Unseen in the screen shot above...Click on Docutainers on the menu bar, and Select SMARTText



Items. Click on the green plus within the SMARText Items Manager.

1. Click on the radio button next to "Custom."
2. Click on the drop-down arrow.
3. Click on the + (expander node) next to Generic. Then Click on the + next to Lists, and Double-click on Toggle Multi-Sel List.
4. Click Create.

SMARText Designer: SMARTips Toggle Multi-Sel List

The screenshot shows the SMARText Designer interface. On the left, the 'SMARText Items' list displays various items, including 'Master Fruit List' which is highlighted. A red arrow points from this item to the 'SMARText Designer' window. The 'SMARText Designer' window has two tabs: 'General' and 'Item Properties'. The 'General' tab shows the 'Item Type' as 'Toggle Multi-Sel List' and the 'Description' as '+++++ Fruit'. The 'Item Properties' tab shows 'Item Settings' with 'Master Fruit List' and 'Item Separators' set to 'Separate with |'. The 'Remove this item via Remove Unused' dropdown is set to 'Always'. A red arrow points from the 'Master Fruit List' in the 'Item Settings' to the 'Master Fruit List' in the 'SMARText Items' list.

****A SMARTips Toggle Multi-Sel List does not require or need a shortcut****

1. For the description of a SMARTips Toggle Multi-Sel list, use five + signs and the name of the Toggle Multi-Sel List. For this example, we typed +++++ [space] Fruit.
2. Give the list keywords. (all keywords need to be separated by a comma and space and be sure to have a unifying keyword that will be used for quick retrieval of all a user's SMARText created



items)

3. As the display header type, +++++.

Drag the SMARText Items Manager to the left side of the screen and the SMARText Designer to the right side of the screen.

4. In the SMARText Items Manager, type in the unifying keyword of the item cluster we made previously, for quick retrieval. In this case, our unifying keyword is, fruit.

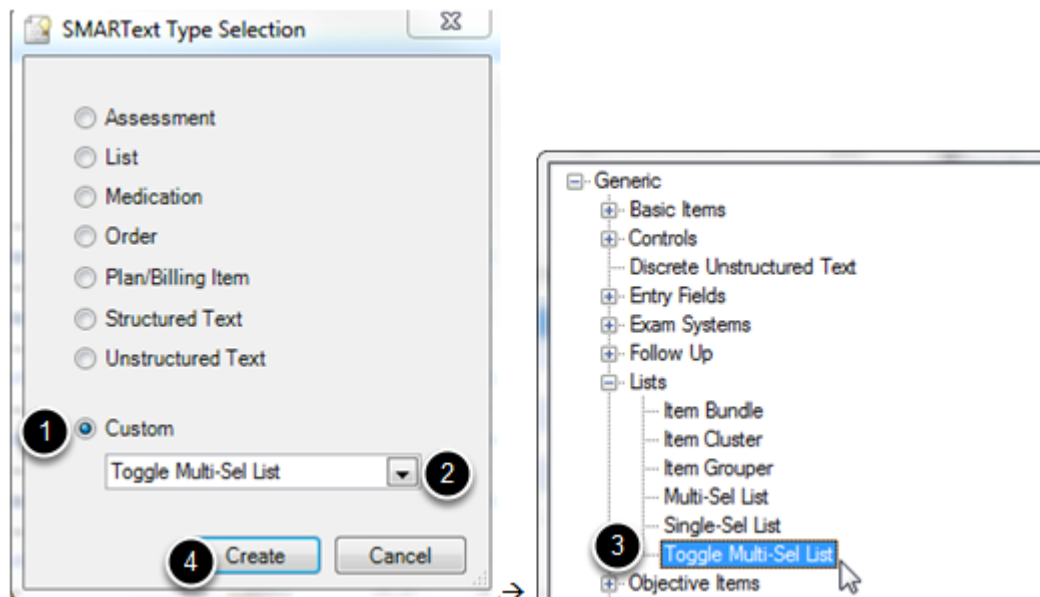
5. Click to highlight, then drag and drop the item cluster into the Item Settings box within the SMARText Designer. The user will see a circle with a line through it-while holding a left-click of the mouse--until the user sees an arrow, meaning he/she is in the clear to release the left-click, and the item cluster will be placed into the Toggle Multi-Sel list.

6. Under "Item Separators," Click "Separate with." In the box to the right of "Separate with," indicate to separate with **[space] [space] | [space] [space]**

7. Under "Remove this item via Removed Unused," Select "Always."

8. Click Save.

Step 5 - Create the Main Toggle Multi-Sel List



We are now going to create the main toggle multi-sel list, which will house all of the previous multi-sel lists we made.

Unseen in the screen shot above...Click on Docutainers on the menu bar, and Select SMARText



Items. Click on the green plus within the SMARText Items Manager.

1. Click on the radio button next to "Custom."
2. Click on the drop-down arrow.
3. Click on the + (expander node) next to Generic. Then Click on the + next to Lists, and Double-click on Toggle Multi-Sel List.
4. Click Create.

SMARText Designer: Main Multi-Sel List [Part 1]

SMARText Items Manager

Search: List - By Type List - By Keyword

Find: fruit 5

Shortcut	Description	Type
	grape	Structured Text
	apple	Structured Text
	Blueberry	Structured Text
	pear	Structured Text
	banana	Structured Text
	Reports favorite...	Toggle Multi-Sel...
	orange	Structured Text
	Denies Favorite...	Toggle Multi-Sel...
	Peach	Structured Text
	Strawberry	Structured Text
	kiwi	Structured Text
6	+++++ Fruit	Toggle Multi-Sel...
fruitques	Fruit Question	Generic Exam O...
ptfo	Patient Fruit Opti...	Generic Exam O...
	Master Fruit List	Item Cluster
	Contact dermatit... Dx	
	(Allergy) APAP...	Allergy
	(Allergy) Antaci...	Allergy
	(Allergy) Antaci...	Allergy
	(Allergy) Antaci...	Allergy
	(Allergy) Pediat...	Allergy

☒ Include Online Library Items.

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SMARText Designer

Shortcut: 1 fruitques

Description: 2 Fruit Question

Keywords: 3 fruit, question

☒ Display Header Fruit Options: 4 only when item is empty.

Advanced

General

Item Type: Multi-Sel List

Fruit Options:

Item Properties

Item Settings

Reports favorite fruit as
Denies Favorite Fruit
+++++ Fruit

Item Separators

☐ As Is ☐ English List (and) ☐ English List (or) ☐ End with

☒ Separate with ☒ Separate Lines 7

☒ Include in EM Code point calculations.

Remove this item via Remove Unused - When Empty

8 Save Cancel

1. This list WILL need a shortcut!
2. Give the list a description.
3. Give the list keywords. (all keywords need to be separated by a comma and space and be sure to have a unifying keyword that will be used for quick retrieval of all a user's SMARText created items)
4. Give the list a display header.



5. In the SMARText Items Manager, type in the unifying keyword of all the multi-sel lists we made previously, for quick retrieval. In this case, our unifying keyword is, fruit.
6. Click to highlight, then drag and drop each multi-sel list into the Item Settings box within the SMARText Designer. The user will see a circle with a line through it-while holding a left-click of the mouse--until the user sees an arrow, meaning he/she is in the clear to release the left-click, and the Toggle and SMARTips multi-sel lists, will be placed into the main Toggle Multi-Sel list.
7. Under "Item Separators," Click "Separate Lines."
8. Click Save.

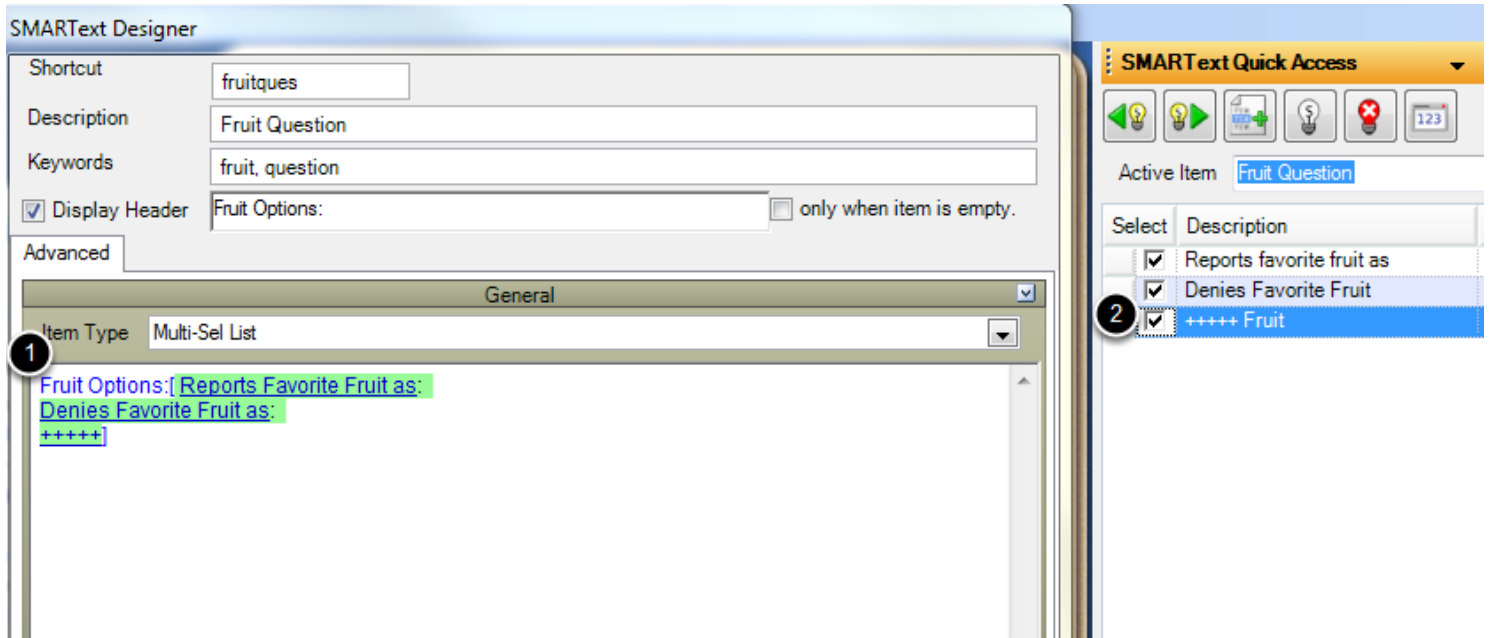
Step 6 - Edit the Main Toggle Multi-Sel List

Shortcut	Description	Ty	Usage	Keywords	Last Modified
	grape	S...	1	fruit, grape	1/25/2012
	apple	S...	1	apple, fruit	1/25/2012
	Blueberry	S...	1	blueberry, fruit	1/25/2012
	pear	S...	1	fruit, pear	1/25/2012
	banana	S...	1	banana, fruit	1/25/2012
	Reports favorite...	T...	1	favorite, fruit, rep...	1/25/2012
	orange	S...	1	fruit, orange	1/25/2012
	Denies Favorite...	T...	1	denies, fruit	1/25/2012
	Peach	S...	1	fruit, peach	1/25/2012
	Strawberry	S...	1	fruit, strawberry	1/25/2012
	kiwi	S...	1	fruit, kiwi	1/25/2012
	+++++ Fruit	T...	1	fruit	1/25/2012
fruitques	Fruit Question	G...	1	fruit, question	1/25/2012

1. Click to highlight the main toggle multi-sel list.
2. Click the edit button.



SMARText Designer: Main Multi-Sel List [Part 2]



1. Click on the main header (in our case, Fruit Options) within the large white box. This will bring up SMARText Quick Access.
2. Select each toggle multi-sel list in SMARText Quick Access, in the order desired. This will place each sub header within the large white box.



SMARText Designer: Main Multi-Sel List [Part 3]

SMARText Designer

Shortcut: fruitques

Description: Fruit Question

Keywords: fruit, question

☒ Display Header: Fruit Options: ☐ only when item is empty.

Advanced

General

Item Type: Multi-Sel List

Fruit Options: Reports Favorite Fruit as:
Denies Favorite Fruit as:
++++ Orange | Peach | Strawberry | Grape | Apple | Banana | Pear | Blueberry Kiwi

Item Properties

Item Settings

Reports favorite fruit as
Denies Favorite Fruit
++++ Fruit

Item Separators

☐ As Is ☐ English List (and)
☐ Separate with ☐ English List (or) ☐ End with
☒ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - When Empty

Save Cancel

SMARText Quick Access

Item/Location	Reports F	Denies F	++++
orange	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peach	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Strawberry	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
grape	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
apple	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
banana	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
pear	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Blueberry	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
kiwi	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. Click on the SMARTips header within the large white box. This will bring up the individual structured items within SMARText Quick Access.
2. Select each structured item, under the SMARTips column within SMARText Quick Access. The structured item will now be visible within the large white box within the SMARText Designer.
3. Click Save.

Step 7 - Insert Main Toggle into SOAPnote

It's time to insert the toggle into a SOAPnote!

Type your main toggle multi-sel list shortcut into the active header, then hit the F11 button on the



keyboard to access the local database since this is the first time the toggle is being used. (for future occasions of using the toggle, the user can just insert the shortcut and press the space bar)

How to Use the Toggle

Objective

Fruit Options: Reports Favorite Fruit as: Peach , Pear
Denies Favorite Fruit as: Strawberry , Kiwi
++++ Orange | Grape | Apple | Banana | Blueberry

Double-click on a structured item within the SMARTips header, and the item will be placed under the first toggle list. (in our case, Reports Favorite Fruit as:)

Double-click on a SMARTips structured item that has been placed in the first toggle list, to send the item to the second toggle list. (in our case, Denies Favorite Fruit as:)

Extra Tid Bit

The screenshot shows the SOAPware interface. The main window displays the SMARTips header with the following text:

Objective
Fruit Options: Reports Favorite Fruit as: Peach
Denies Favorite Fruit as: Strawberry , Kiwi
++++ [Orange | Grape | Apple | Banana | Blueberry Peach]

The SMARText Quick Access panel is open on the right, showing a table with the following columns: Item/Location, Reports F, Denies Fa, and +++++. The table contains the following rows:

Item/Location	Reports F	Denies Fa	+++++
orange	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peach	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Strawberry	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
grape	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
apple	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
banana	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
pear	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blueberry	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
kiwi	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Should a user place a structured item under one of the toggles in the documentation and desire to remove that item from one of the toggle lists, in order to place it back into the SMARTips list, follow the steps listed below.

1. Click on the SMARTips header.
2. Re-check the structured item under the SMARTips column within SMARText Quick Access.

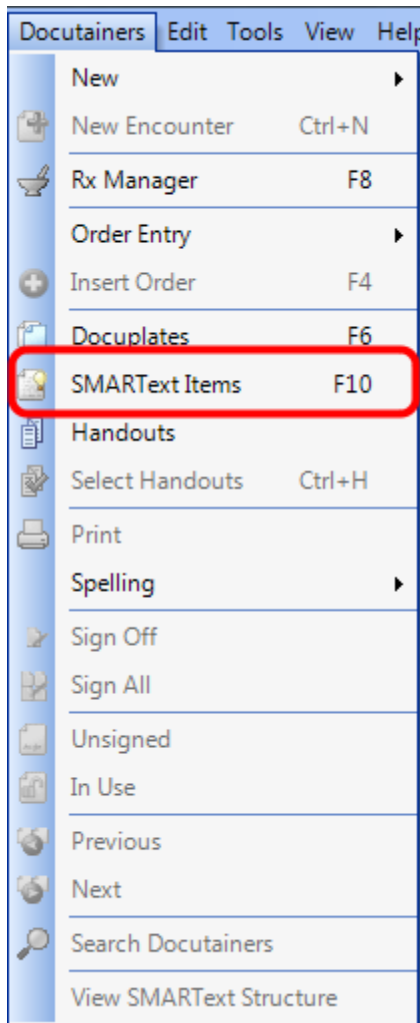


Create Item Clusters and Bundles

An Item Cluster contains a group of structured SMARText items that can be placed inside different multi-select lists, bundles and groupers. Examples of structured SMARText items that might be used in a "Severity" cluster would be: "Mild," "Moderate," and "Severe."

***Note:** It is not possible to insert an Item cluster directly into a patient's chart.

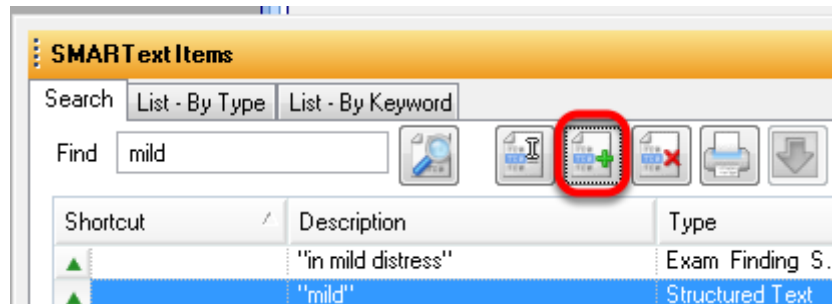
Open the SMARText Items Manager



Open the SMARText Items Manager by going to Docutainers > SMARText Items or by pressing F10 on the keyboard.

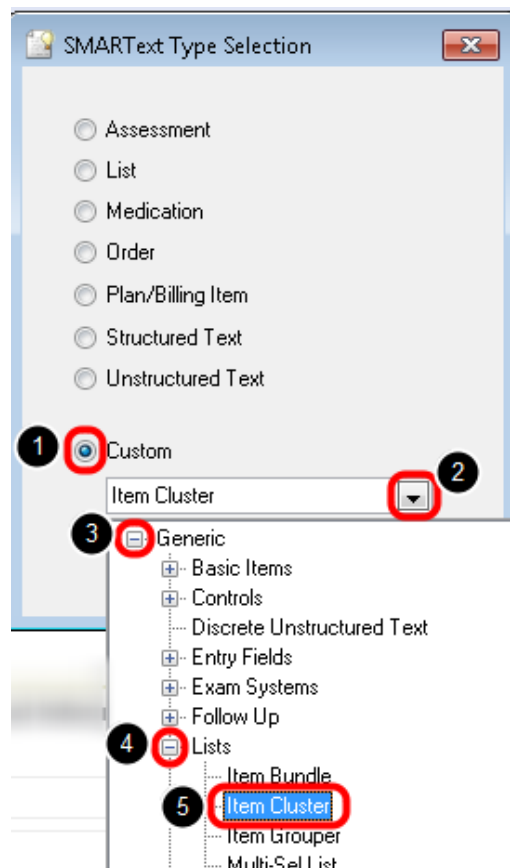


Create the Cluster



To create a SMARTText Cluster, Click on the Create New button (green plus).

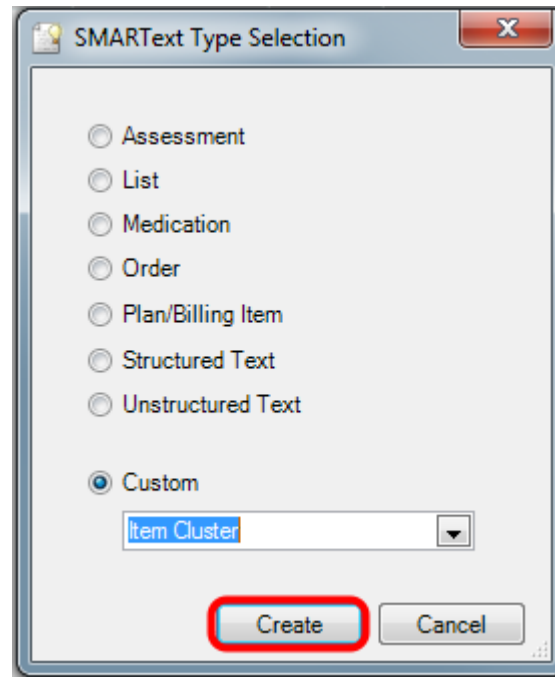
Select the SMARTText Type



1. Select the "Custom" radio button
2. Click on the drop-down arrow
3. Click on the + (expander node) next to Generic.



4. Click on the + next to Lists
5. Double-click on Item Cluster



After the Item Cluster type has been selected, Click the Create button.



Enter Cluster Demographics

SMARText Designer

Shortcut

Description **1** Severity

Keywords **2** severity, mild, moderate, severe, ITG

☐ Display Header ☐ only when item is empty.

Advanced

General

Item Type Item Cluster

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - When Empty

Coding / Notes

Structure Viewer

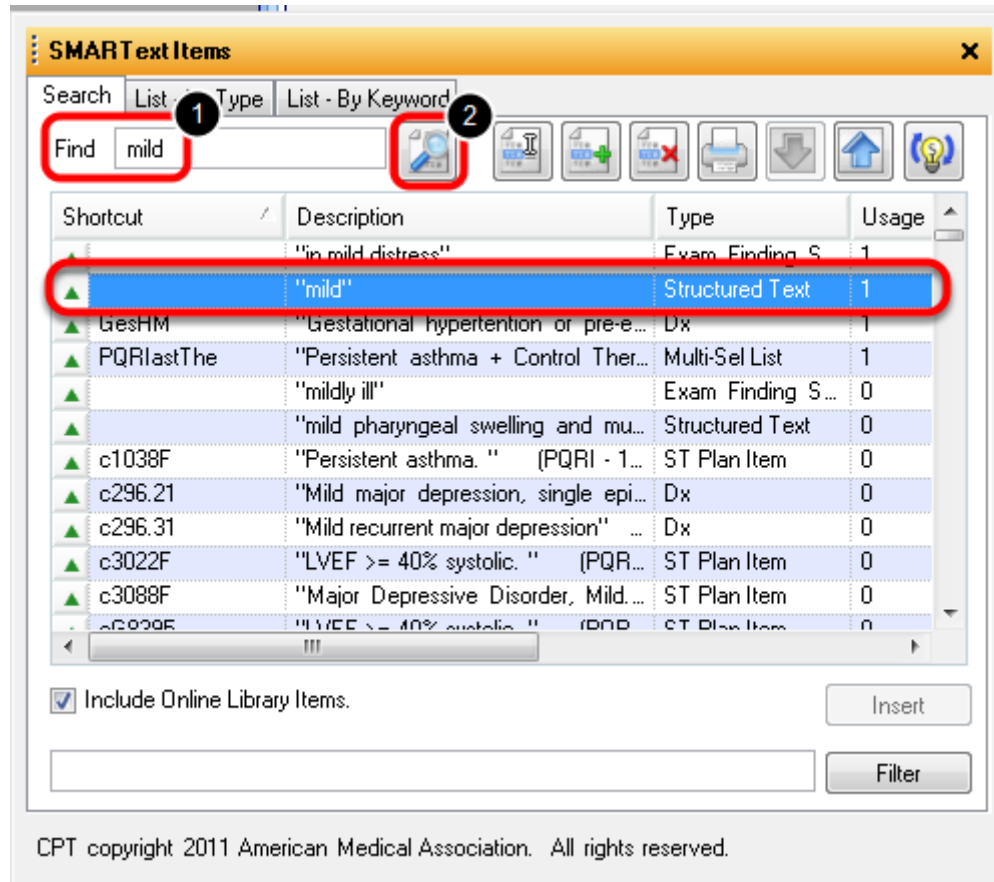
Save Cancel

1. **Description:** Create a description for the item cluster.
2. **Keywords:** Create keywords for the item cluster (All keywords should be one word separated by a comma and a space. We also recommend placing a unique keyword for the clinic on all SMARText items that are created.)



***Note:** Item clusters cannot be inserted directly into the patient's chart, therefore, it is not necessary to insert a **Shortcut** or **Display Header** for item clusters.

Locate Sub-Items



To build a cluster, all of the structured SMARTText items within the cluster must already be created. Structured SMARTText items can be found by searching for the item in the SMARTText Items Manager.

To search for an existing SMARTText item:

1. Type in a keyword for the structured SMARTText item.
2. Click on the Search button (the magnifying glass) to perform the search.



For instructions on how to create Structured SMARText items, please see: [Create Structured SMARText Items](#).

Place Structured SMARText Items into the Cluster

The screenshot displays the SMARText Designer window. On the left, the 'SMARText Items' manager is open, showing a list of items. A red box highlights the search bar with the text 'moderate' (labeled 1) and a red arrow points to the 'moderate' item in the list (labeled 2). A black callout box with white text says 'Drag and Drop each Structured Text Item into the Item Setting Box'. On the right, the 'SMARText Designer' window is open. A red box highlights the 'Item Settings' box (labeled 3) and the 'Item Properties' box (labeled 4). The 'Item Properties' box shows the 'Item Separators' section with 'Separate Lines' selected. A red box highlights the 'Save' button (labeled 5).

SMARText Designer

Shortcut: [text box]
Description: Severity
Keywords: severity, mild, moderate, severe
☐ Display Header ☐ only when item is empty.

Advanced

General

Item Type: Item Cluster

Item Settings: "mild" (labeled 3)

Item Properties (labeled 4)

Item Separators:
☐ As Is
☐ Separate with [text box]
☒ Separate Lines
☐ English List (and)
☐ English List (or)
☐ End with [text box]

☒ Include in EM Coder point calculations.

Save (labeled 5) Cancel

Drag the SMARText Items Manager to the left side of the screen and the SMARText Designer to the right side of the screen.

1. Search for and locate each Structured Text item that will be placed in the item cluster (as described in the previous step).
2. Drag and drop each of the structured items into the Item Settings box within the SMARText Designer window. Repeat this step until all structured items are placed in the Item Settings box of the SMARText Designer.
3. In the Item Separators area of the SMARText Designer window, select the desired separator. This setting will tell the item cluster (if multiple items are selected from the cluster) how to display the items within the users documentation. (Ex: If "Separate Lines" is selected, the items would display on separate lines when inserted into the documentation. If "English List (and)" is selected, the items would display as follows: "mild, moderate, and severe" when



entered inserted into the documentation.)

4. Click the Save button to save the new item cluster.

For another example of the steps just listed, refer to "Step 2" of the lesson found here: [Step 2: Create an Item Cluster](#).

Insert the Cluster into a Pick List

The screenshot displays the SMARTText Designer interface. On the left, the 'SMARTText Items' window shows a list of items. The 'Severity' item cluster is highlighted with a red box and a red arrow pointing to it. On the right, the 'SMARTText Designer' window is open, showing the 'General' tab. The 'Item Type' is set to 'Multi-Sel List'. The 'Item Settings' section shows 'Severity' selected. The 'Item Separators' section shows 'Separate with' selected. The 'Advanced' tab is also visible, showing the 'Description' and 'Keywords' fields.

Shortcut	Description	Type	Usage
	Severity	Item Cluster	0
	"lowest recent blood sugar was..."	HPI Finding Spec	0
	"highest recent blood sugar was..."	HPI Finding Spec	0
	"highest recent peak flow was..."	HPI Finding Spec	0
	"lowest recent blood pressure wa..."	HPI Finding Spec	0
	"measures blood sugar at least m..."	HPI Finding Spec	0
	"length in cm..."	HPI Finding Spec	0
	"measures blood pressure at least..."	HPI Finding Spec	0
	"average blood sugar is..."	HPI Finding Spec	0
	"measures peak flow at least mon..."	HPI Finding Spec	0
	"defect of..."	HPI Finding Spec	0
	"not measuring blood sugar..."	UDI Finding Spec	0

The cluster has now been created and may be inserted into multiple pick lists.

Not shown in the screenshot above:

Open the SMARTText Item Manager by Clicking on Docutainers > SMARTText Items from the menu, or Click F10 on the keyboard.

Click on the green plus.

Click "Custom," and from the drop-down arrow, Click to expand the node by Generic, and well as Lists, and Select "Multi-Sel List."

As shown in the screenshot above:



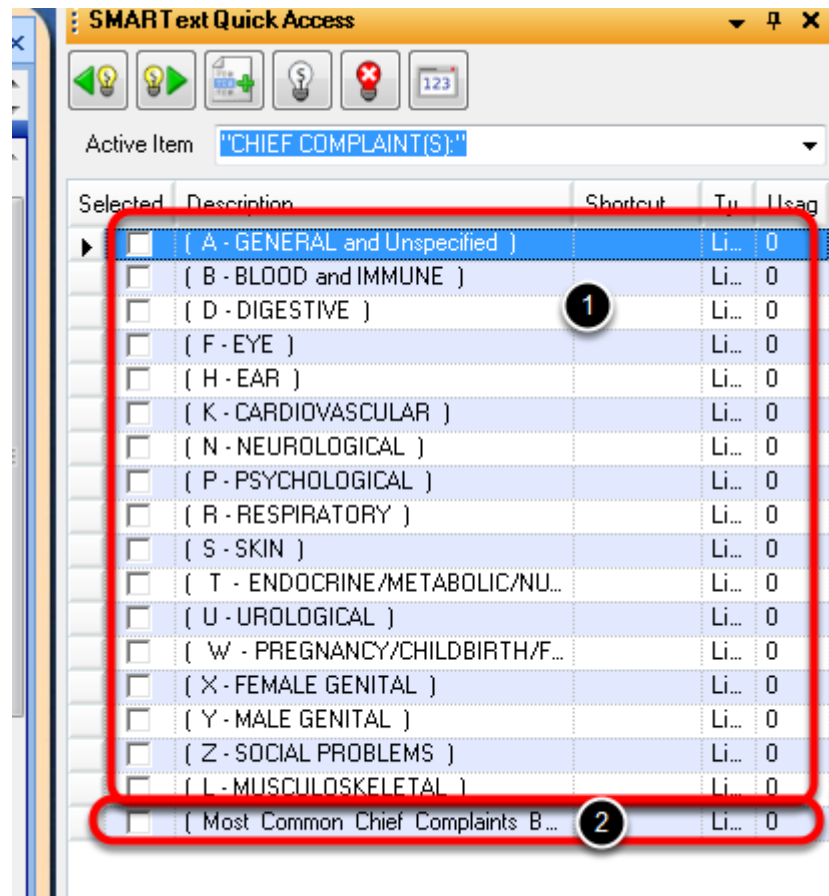
1. In the Designer, give the pick list a shortcut, description, keywords, and a display header. In this example our header that will display in the documentation is: " Patient states their pain is:."
2. Type in the keyword for searching purposes into the SMARTText Item Manager and Click on the Search button.
3. Highlight the Cluster and drop and drop the Cluster into the Item Settings box within the Designer.

Always Click Save.

The new pick list is ready for use within the patient's chart. Just enter the keyword given to this pick list and Click enter on your keyboard!

Item Bundles vs Item Clusters

Item Bundles are created with the same steps as Item Clusters, however, they will display differently within SMARTText Quick Access. Also, just like clusters, bundles cannot be placed directly into a patient's chart and must be placed within another type of SMARTText list.



In the example above, the Chief Complaint Pick list contains one Cluster and one Bundle. The cluster automatically displays all of the sub-items while the bundle must be checked within Quick Access, to display it's sub-items.

1. Item Cluster
2. Item Bundle

The choice between creating an Item Cluster verses an Item Bundle all depends on how the user wishes for the sub-items to display within the pick list.

Creating Item Bundles Using SMARTText Item Builder

Item Bundles can also be created using the SMARTText Item Builder workspace. For instructions on creating bundles using this workspace, please see: [List Creator](#).



Create an Item Grouper

Item Groupers are SMARTText items that, when inserted to a patient's chart, enter multiple pick lists, in a particular sequence, at one time.

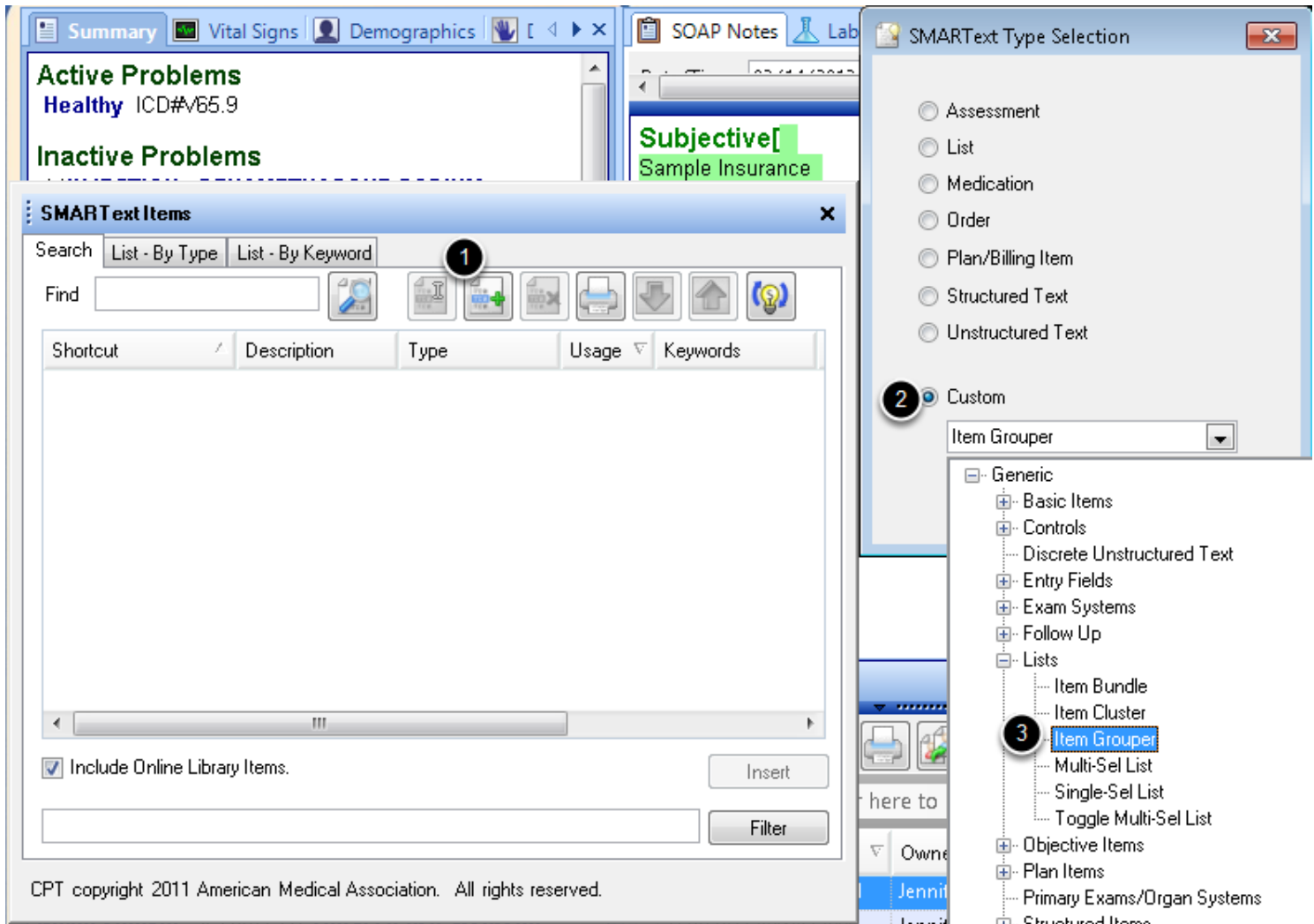
Example of an Item Grouper

```
Family History[  
  PARENTS:  
  CHILDREN:  
  GRANDPARENTS:  
  SIBLINGS:  
  UNCLES/AUNTS:  
  OTHERS/DISTANT:  
  Positive family history for -  
  Negative family history for -  
]
```

The above image is an example of an Item Grouper within the default Summary docuplate. When the shortcut "fam-" (hit the spacebar after typing in the shortcut) is inserted into the patient's chart, multiple pick lists, that are in a pre-defined order, are inserted automatically.



Create an Item Grouper



Item Groupers are created in the SMARTText Items Manager, then edited in SMARTText Builder: Structure Editor.

1. Click on the **Green +** to create an Item Grouper
2. Select **Custom** in the SMARTText Type Selection box
3. Click the + next to **Lists** and select **Item Grouper**.



SMARText Designer: Item Grouper

SMARText Designer

Shortcut 1

Description

Keywords

☐ Display Header ☐ only when item is empty.

Advanced

General

Item Type

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

2 Save Cancel

1. Complete Item Demographics, including the Shortcut code, Description and Keywords.
2. Save the Item.

Sub-items to a grouper will need to be inserted using the SMARText Builder: Structure Editor. Please see SMARText Structure Editor for more information.



Create a Custom HPI SMARTText Item

This lesson will discuss how to create a custom HPI SMARTText item. To complete this lesson, users must have a basic understanding of SMARTText items.

Please do not attempt to create a custom HPI item without reviewing the [Creating SMARTText Items](#) chapter of the [Clinical 2012 User Manual](#) and the [Create Item Clusters and Bundles](#) lesson in the [Advanced SOAPware User Manual](#).

HPIx

Subjective
HPI:
SYMPTOMS/RELATED: Symptoms include
LOCATION: Area of involvement described as
QUALITY/COURSE: Symptoms reported to be
INTENSITY/SEVERITY: Measurement (degree) defined as
DURATION: The general length of symptoms is reported to be
ONSET/TIMING: Occurrence reported as
CONTEXT/WHEN: Usually associated with
MODIFIERS/TREATMENTS: Improved by

The HPI SMARTText item shown in the screen shot above is compatible with EM coder. The shortcut for the SOAPware created HPI item is "HPIx". This item contains multiple SMARTText items with various item types. Each item must be created with the proper item type and correct hierarchy, or this item will not calculate with EM coder, or operate correctly, when inserted into the patient's chart.



HPI Hierarchy

HPI: (HPI Item)			
1. SYMPTOMS/RELATED: (Symptoms/Related)	4. Allergic Immunologic Cluster	i. Intensity/Severity Cluster	d. Has avoided (Toggle multi-select list)
a. Symptoms include (Toggle multi-select list)	a. All symptoms/related items (structured Text)	1. All Intensity items (structured Text)	i. Treatments Cluster
i. Symptoms Cluster	5. HENT Cluster	c. ***** (Toggle multi-select list)	e. Part evaluation and/or work up includes (Toggle multi-select list)
1. General Constitutional Cluster	a. All symptoms/related items (structured Text)	i. Intensity/Severity Cluster	i. Treatments Cluster
a. All symptoms/related items (structured Text)	6. Eyes Cluster	1. All Intensity items (structured Text)	1. All Modifiers items (structured Text)
2. Endocrine Cluster	a. All symptoms/related items (structured Text)	d. Shared History Cluster	f. ***** (Toggle multi-select list)
3. Hematologic Lymphatic Cluster	7. Lung Cluster	a. The general length of symptoms is reported to be (Toggle multi-select list)	i. Treatments Cluster
a. All symptoms/related items (structured Text)	8. Shared Cluster History	i. Duration Cluster	1. All Modifiers items (structured Text)
4. Allergic Immunologic Cluster	a. All symptoms/related items (structured Text)	1. All Duration items (structured Text)	
a. All symptoms/related items (structured Text)	d. Shared History Cluster	b. Declines to define duration as (Toggle multi-select list)	
5. HENT Cluster	i. no complaints	i. Duration Cluster	
a. All symptoms/related items (structured Text)	ii. N/A	c. ***** (Toggle multi-select list)	
6. Eyes Cluster	iii. unremarkable	i. Duration Cluster	
a. All symptoms/related items (structured Text)	iv. otherwise unremarkable	1. All Duration items (structured Text)	
7. Lung Cluster	v. uncertain	c. ***** (Toggle multi-select list)	
8. Shared Cluster History	2. LOCATION: (Location)	i. Duration Cluster	
a. All symptoms/related items (structured Text)	a. Area of involvement described as (Toggle multi-select list)	6. ONSET/TIMING: (Onset/Timing)	
b. Denies symptoms of (Toggle multi-select list)	i. Location Cluster	a. Occurrence reported as (Toggle multi-select list)	
i. Symptoms Cluster	1. All Location items (structured Text)	i. Onset Cluster	
1. General Constitutional Cluster	2. Shared History Cluster	1. All Onset items (structured Text)	
a. All symptoms/related items (structured Text)	b. Denies regionality as (Toggle multi-select list)	i. Onset Cluster	
2. Endocrine Cluster	i. Location Cluster	1. All Onset items (structured Text)	
3. Hematologic Lymphatic Cluster	1. All Location items (structured Text)	c. ***** (Toggle multi-select list)	
a. All symptoms/related items (structured Text)	2. Shared History Cluster	i. Onset Cluster	
4. Allergic Immunologic Cluster	c. ***** (Toggle multi-select list)	1. All Onset items (structured Text)	
a. All symptoms/related items (structured Text)	i. Location Cluster	7. CONTEXT/WHEN: (Context/When)	
5. HENT Cluster	1. All Location items (structured Text)	a. Usually associated with (Toggle multi-select list)	
6. Eyes Cluster	2. Shared History Cluster	i. Context Cluster	
a. All symptoms/related items (structured Text)	3. QUALITY/COURSE: (Quality/Course)	b. Denies association with (Toggle multi-select list)	
7. Lung Cluster	a. Symptoms reported to be (Toggle multi-select list)	i. Context Cluster	
a. All symptoms/related items (structured Text)	i. Quality Cluster	c. ***** (Toggle multi-select list)	
8. Shared Cluster History	1. All Quality items (structured Text)	i. Context Cluster	
a. All symptoms/related items (structured Text)	b. Denies in general (Toggle multi-select list)	1. All Context items (structured Text)	
c. ***** (Toggle multi-select list)	i. Quality Cluster	8. MODIFIERS/TREATMENTS: (Modifiers/Treatments)	
i. Symptoms Cluster	1. All Quality items (structured Text)	a. Improved by (Toggle multi-select list)	
1. General Constitutional Cluster	d. Shared History Cluster	i. Treatments Cluster	
a. All symptoms/related items (structured Text)	4. INTENSITY/SEVERITY: (Intensity/Severity)	b. History of (Toggle multi-select list)	
2. Endocrine Cluster	a. Measurement (degrees) defined as (Toggle multi-select list)	i. Treatments Cluster	
a. All symptoms/related items (structured Text)	i. Intensity/Severity Cluster	1. All Modifiers items (structured Text)	
3. Hematologic Lymphatic Cluster	1. All Intensity items (structured Text)	c. Has tried (Toggle multi-select list)	
a. All symptoms/related items (structured Text)	b. Declines to define as (Toggle multi-select list)	i. Treatments Cluster	
		1. All Modifiers items (structured Text)	

The HPI SMARTText item is similar to a branching tree. The main HPI header is the trunk of the tree. The Symptoms Related, Location, Quality/Course, are the branches and the Reports/Denies are the limbs. And finally, the Symptoms are to be considered the leaves.

The HPI hierarchy is built backwards, meaning that a user would begin with building the lowest item (the leaves/Symptoms) and work backwards.

Here is a generic list of the steps of creating a custom HPI SMARTText item:

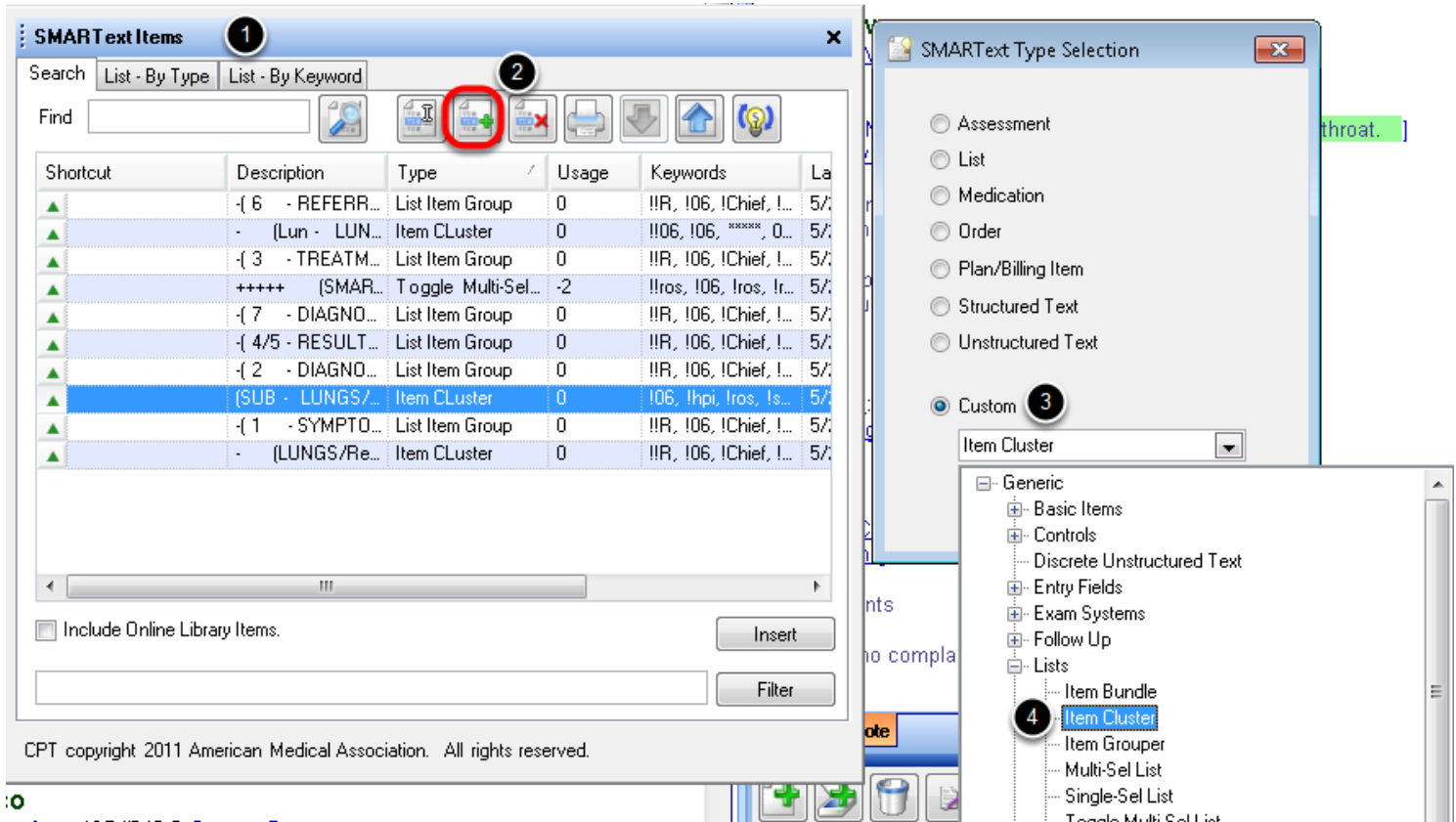
1. Create or search for the symptoms.
2. Place symptoms into clusters (this may be a general cluster or body system specific cluster. Many users create one generic cluster for each HPI Finding item).
3. Place those clusters into multi-sel lists.
4. Place multi-sel lists into the appropriate HPI Finding item: Symptoms/Related, Location, Quality/Course, Intensity/Severity, Duration, Onset/timing, Context/When and Modifiers/Treatments.
5. Place all of the HPI Finding items inside an HPI SMARTText item.



SOAPware, Inc.



Create a Symptom Cluster



1. Open the SMARText Items Manager by pressing **F10** on the keyboard (or select **Docutainers > SMARText Items** from the menu bar).
2. Click on the **Green +** to create a new item.
3. In the SMARText Type Selection box, Select **Custom**.
4. From the drop down menu, click the expander node next to "**Generic**" as well as "**Lists**", then choose "**Item Cluster**."

Click the **Create** button.



SMARText Designer : Symptom Cluster

SMARText Designer

Shortcut:

Description: (SUB - LUNGS/Respiratory -Cluster) (History)

Keywords: LUNGS/Respiratory, Respiratory, rosx, !sub, !hpi, !ros, history, 06.0.R.RES, !06, !III, CLUSTER, ^^^^^, Review

☐ Display Header ☐ only when item is empty.

Advanced

General

Item Type: Item Cluster

Item Settings:

- "cough" +
- "dyspnea"
- "hemoptysis"
- "orthopnea"
- "wheezing"
- "sputum/phlegm production that is purulent"
- "sputum/phlegm production"

(SM)

Item Properties

Item Separators:

- ☐ As Is
- ☐ English List (and)
- ☒ Separate with
- ☐ English List (or)
- ☐ End with
- ☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused -

Coding / Notes

Structure Viewer

Save Cancel

Structured items will then be added to a Cluster in the Items Setting box within SMARText Designer. The screen shot above shows structured respiratory symptoms that have been placed in a "Lungs" cluster. It is not necessary to create a unique cluster for each body system, as many users simply create one generic cluster to be placed in the items under each HPI Finding item.

For information on how to create a cluster, see Step 2 of the lesson, Creating Toggles or review



the lesson, Create Item Clusters and Bundles.

**Note: This step will be need to be repeated as necessary, to create clusters for each HPI Finding.*



Create a Multi-Sel List

Item/Location	Symptom	Denies	+++++
"mass/lump or swelling"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"trauma or injury"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"weakness or tiredness"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"weight loss" [...]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"fatigue (malaise or lethargy)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"possible medication side effects"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"pains - generalized/multiple sites"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"sweating problems" ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"chest pain (nonspecific)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"concern about or fear of medical treatment"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"chills (intensity = teeth-chattering)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"fever"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"fever (documented >100.5)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"fever (subjective, not confirmed)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"coma or stupor"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"fainting or syncope"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"night sweats"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"N/A"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"no complaints"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"otherwise no complaints"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"otherwise unremarkable"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"uncertain" [...]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"unremarkable"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"polydipsia or excessive thirst" (SM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"polyphagia or excessive appetite" (SM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"anorexia or loss of appetite"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"child/infant feeding issues (what/how)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"adult feeding issues (what/how)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"weight gain" [...]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"weight loss" [...]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"growth delay"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"dehydration"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"lymph glands enlarged or painful"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"bleeding problems"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
"bruising (unusual)"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

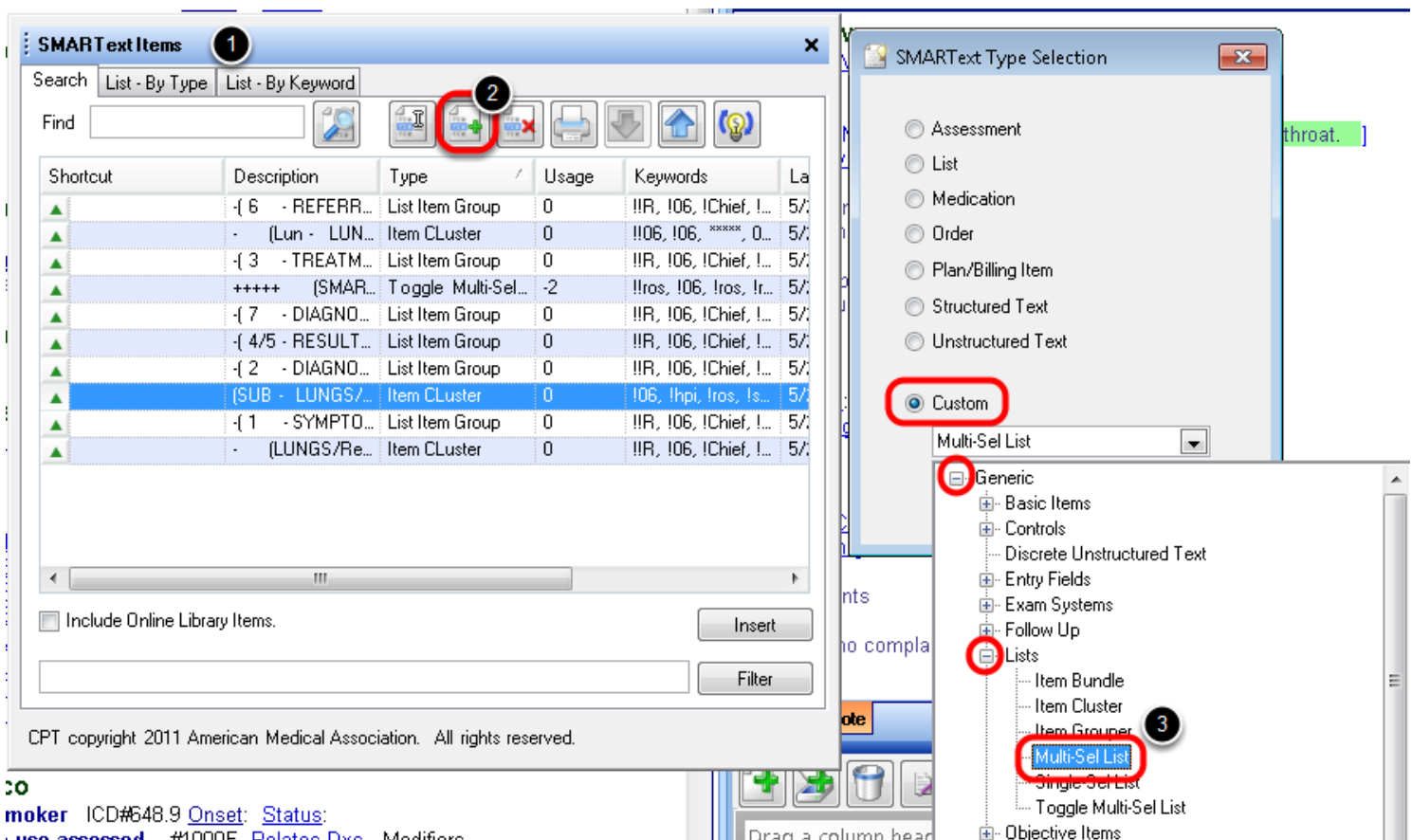
A Multi-Sel list is designed to allow the user to have the same choices in each list and select from multiple lists at all at once within SMARTText Quick Access window-as shown above. After the cluster has been created, Multi-Sel lists for Reports and Denies must be created. If the



user would like to use the toggle feature (+++++), known as SMARTips, this would be the time to create this feature. To learn how to create a Multi-Sel List, please start at Step 3 on the Creating Toggles lesson.

The image above shows that when a user clicks on either Reports symptoms of, Denies symptoms. or SMARTips (+++++) the same list of symptoms will appear.

Note: If an item is selected under Reports it cannot be selected under Denies as well.



1. Open the SMARText Items Manager by pressing **F10** on the keyboard (or select **Docutainers > SMARText Items** from the menu bar).
2. Click on the **Green +** to create a new item.
3. In the SMARText Type Selection box select **Custom**, click on the expander nodes (+) next to **"Generic"** and **"Lists"**, then choose **"Multi-Sel List."**

Click **Create**.



The cluster of symptoms/choices will be placed within each of the multi-sel lists: Symptoms include, Denies Symptoms or SMARTips(+++++). Basically the same cluster has been placed within each of these separate Multi-Sel lists.

Add the Cluster to the Multi-Sel Lists

SMARTText Designer

Shortcut: |

Description: " Reports symptoms of" (SYMPTOMS/RELATED)

Keywords: SYMPTOMS/RELATED:x, history, !SymR, subjective, related, EMC, !subl, !HPI, complaint, hpix, toggle, 0902

☒ Display Header: Reports symptoms of ☐ only when item is empty.

Advanced

General

Item Type: Toggle Multi-Sel List

Reports symptoms of

Item Settings

(SUB - SYMPTOMS/RELATED Cluster) (History)

Item Properties

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with , ☐ English List (or) ☒ End with .

☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - When Empty

Coding / Notes

Save Cancel

1. Complete the Description, Keywords (remember to include a unique keyword for easy retrieval purposes) and Display Header for the list. **Note:** *It is not necessary to create a shortcut as this list will be placed inside of another SMARTText item.*

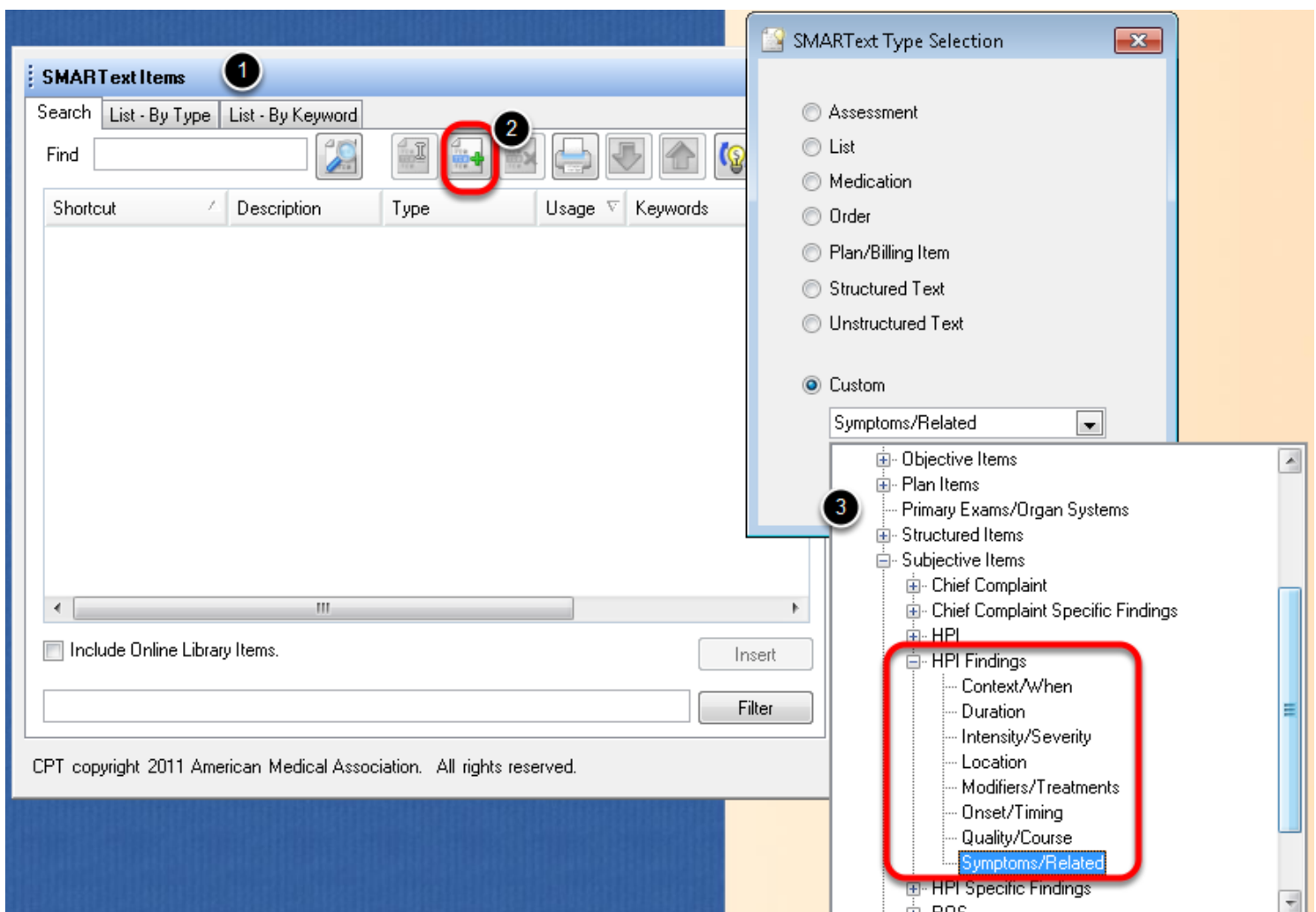


2. Drag and drop the Cluster into the Items Settings box, from the SMARText Items Manager.
3. Click **Save**.

Repeat this process for each of the 3 lists, for all HPI Finding items:

- Reports symptoms of
- Denies Symptoms of
- ++++++

Create the HPI Finding Item



1. Open the SMARText Items Manager by pressing **F10** on the keyboard (or select **Docutainers > SMARText** Items from the menu bar).
2. Click on the **Green +** to create a new item.



3. In the SMARText Type Selection box select **Custom**, click on the expander nodes (+) next to "**Generic**", "**Subjective Items**", and "**HPI Findings**" then choose the desired HPI Finding which in this case is "**Symptoms/Related**."

Click **Create**.

SMARText Designer: HPI Finding Item

SMARText Designer

Shortcut: SymX

Description: " SYMPTOMS/RELATED:"

Keywords: SYMPTOMS/RELATED:x, lhpil, subjective, lSym, hpi, related, EMC, history, lsubl, SymX, toggle, 090222b

☒ Display Header: SYMPTOMS/RELATED: ☐ only when item is empty.

Advanced

General

Item Type: Symptoms/Related

SYMPTOMS/RELATED:

Item Settings

	Reports	Denies	SMARTips
" Reports symptoms of"	(SYMPTOMS/REA		
" Denies symptoms of"	(SYMPTOMS/RELA		
+++++ (SMARTips)	SYMPTOMS/REL		

Item Properties

Item Separators

☐ As Is ☐ English List (and)

☐ Separate with ☐ English List (or) ☐ End with

☒ Separate Lines

☒ Include in EM. Code point calculations.

Remove this item via Remove Unused - When Empty

Coding / Notes

Structure Viewer

Save Cancel

1. Complete the Shortcut, Description, Keywords and Display Header for the list.
2. Drag and drop the Multi-Sel lists for Reports, Denies and SMARTips (+++++), in the Items Settings box from the SMARText Items Manager. Also indicate in the Item Properties area to



have "Separate Lines."

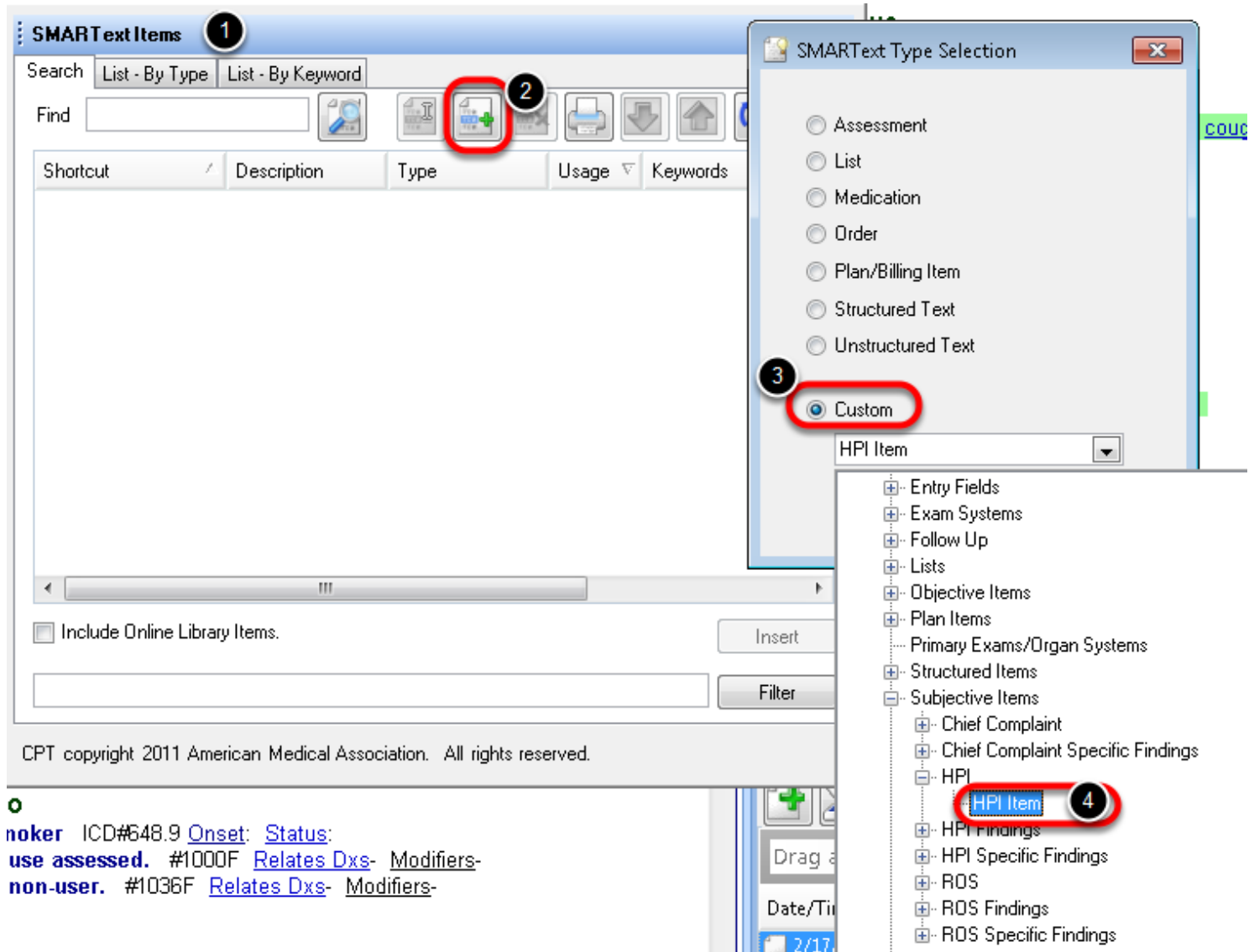
3. Click Save.

Repeat this process for all of the following Multi-Sel lists if desired:

- Context/When
- Duration
- Intensity/Severity
- Location
- Modifiers/Treatments
- Quality Course
- Symptoms/Related



Create the HPI Item



1. Open the SMARTText Items Manager by pressing **F10** on the keyboard (or select **Docutainers > SMARTText** Items from the menu bar).
2. Click on the **Green +** to create a new item.
3. In the SMARTText Type Selection box select **Custom**, click on the expander nodes (+) next to "**Generic**", "**Subjective Items**", and "**HPI**".
4. Select "**HPI Item**".

Click **Create**.



SMARText Designer: HPI Item

1. Complete the Shortcut, Description, Keywords and Display Header for the list.
2. Drag and drop the HPI Finding items in the **Items Settings** box from the SMARText Items Manager. Also indicate in the Item Properties area to have "Separate Lines."
3. Click **Save**.

The HPI item is now complete and may be inserted to the patient's chart or desired docuplate.



Using Document Designer Commands in a SOAPnote

Several Document Designer data item commands can be used to pull information from other parts of the patients chart, provider manager, contact manager, or the patient's account. This lesson will discuss how to use the data item commands within the SOAPnote and how to create a docuplate using data item commands.

Example of a Docuplate that Contains Data Item Commands

EXAMPLE DOCUPLATE

Subjective

##\$FirstName## is a ##\$Age## year old (Date of Birth: ##\$GeneralDemographicsField Birthdate##) ##\$Gender male,female## and is here today for the following:
##\$AskQuestion Patient is here for:...##

CHIEF COMPLAINT(S):

MEDICAL HISTORY REVIEWED TODAY:

CURRENT DIAGNOSIS:

##\$SummaryField Active Problems##

CURRENT MEDICATIONS:

##\$SummaryField Medications##

ALLERGIES:

##\$SummaryField Allergies##

FAMILY HISTORY:

##\$SummaryField Family History##

SMOKING STATUS:

##\$SummaryField Tobacco##

ALCOHOL USAGE:

##\$SummaryField Alcohol##

SOCIAL HISTORY:

##\$SummaryField Social History##

AFTER DOCUPLATE HAS BEEN INSERTED INTO A SOAPNOTE

Subjective[

Lillian is a 29 year old (Date of Birth: 5/12/1982) female and is here today for the following:
CHIEF COMPLAINT(S): Cough, Fever, Influenza.

MEDICAL HISTORY REVIEWED TODAY:

CURRENT DIAGNOSIS:

Asthma, severe, persistent ICD#493.90
Diabetes - Type 2 ICD#250.00
Benign hypertension ICD#401.1

CURRENT MEDICATIONS:

Hytrin (Terazosin): 10 mg (capsule) SIG- 1 cap(s) once a day (at bedtime)

Advair Diskus (Fluticasone/Salmeterol): 100 mcg-50 mcg (powder) SIG- 1 puff(s) every 12 hours

ALLERGIES:

Drug Allergies. No Known.

FAMILY HISTORY:

Positive family history for - Diabetes - Type 2; Hypertension; Kidney disease; Migraine; Osteoporosis; Asthma; Arthritis;
Negative family history for - Cancer; Cancer of Breast; Mental Illness;



SOAPnote

Document Designer contains multiple data item commands that can pull information from various areas of SOAPware, and place information on a printable document. Data items can come from the patients chart, Provider Manager, Contact Manager and a patient's account.

Many of these data item commands may also be placed into a docuplate. When the docuplate is inserted into the patient's chart, the data item command will automatically place the desired information into the patient's chart.

There are several exceptions and specific behaviors that must be understood before attempting to use these data item commands...

- **Data Commands CANNOT be cut and pasted into the patient's chart.**



- **Data Commands or SMARText items for data commands must be inserted within the Docuplate Manager, WITHOUT a patient chart open.**
- **Data Commands for Contact Manager CANNOT be used in the patient's chart.**
- **Data Commands or SMARText items for data commands CANNOT be used in a Default SOAPnote or Summary Docuplate.**

SMARText Items for Data Commands

SMARText Items

Search List - By Type List - By Word

Find designer

1

3

2

Shortcut	Description	Type	Usage	Keywords	Last Mod
cliadd	#\$ClinicInfo Address\$#	Misc. (US)	0	#\$ClinicInfo, 201...	
clinpho	#\$ClinicInfo PhoneNumber\$#	Misc. (US)	0	#\$ClinicInfo, 201...	
clinsig	#\$ClinicianSignature\$#	Misc. (US)	0	#\$ClinicianSigna...	
curprostateid	#\$CurrentProvider StateID\$#	Misc. (US)	0	#\$CurrentProvid...	
currprodea	#\$CurrentProvider DEAS\$#	Misc. (US)	0	#\$CurrentProvid...	
currprofirst	#\$CurrentProvider First Name\$#	Misc. (US)	0	#\$CurrentProvid...	
currprolast	#\$CurrentProvider Last Name\$#	Misc. (US)	0	#\$CurrentProvid...	
currprov	#\$CurrentProvider Full Names\$#	Misc. (US)	0	#\$CurrentProvid...	
cusdemo1	#\$CustomDemographicsField Custom1\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo10	#\$CustomDemographicsField Custom10\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo11	#\$CustomDemographicsField Custom11\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo12	#\$CustomDemographicsField Custom12\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo2	#\$CustomDemographicsField Custom2\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo3	#\$CustomDemographicsField Custom3\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo4	#\$CustomDemographicsField Custom4\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo5	#\$CustomDemographicsField Custom5\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo6	#\$CustomDemographicsField Custom6\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemo7	#\$CustomDemographicsField Custom7\$#	Misc. (US)	0	#\$CustomDemo...	
cusdemonote	#\$CustomDemographicsField CustomNote\$#	Misc. (US)	0	#\$CustomDemo...	

☒ Include Online Library Items.

Insert

Filter

CPT copyright 2011 American Medical Association. All rights reserved.

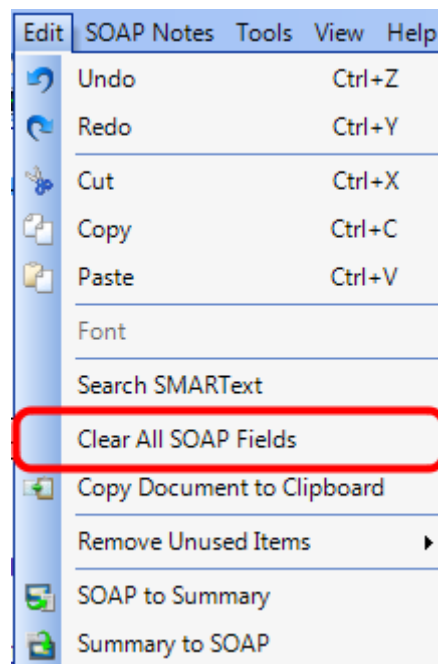
SOAPware has created unstructured SMARText items for all Document Designer commands. The exceptions would be the commands that pull over from contacts, as well as the patient's picture.



These particular commands may be found on the SOAPware online library. To search for them, open the SMARTText Items Manager by hitting F10 on your keyboard or by going to Docutainers > SMARTText Items.

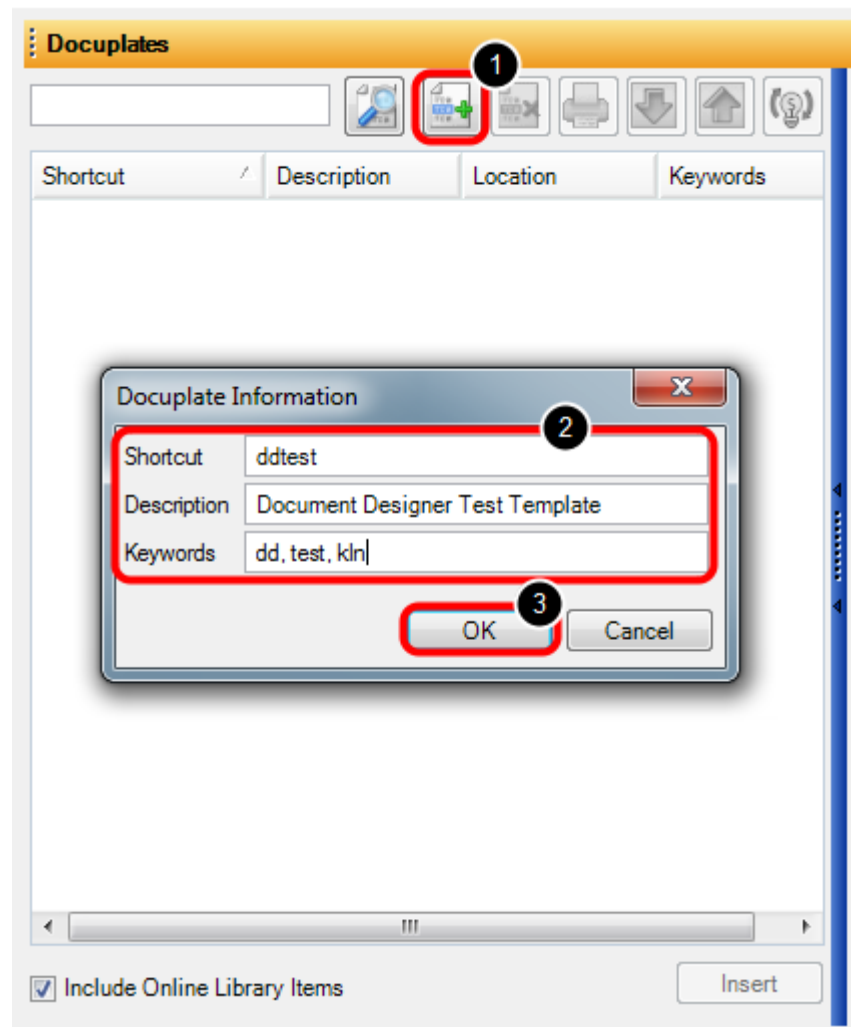
1. Search for the items by using the keyword "**designer**." Each of these SMARTText items have their own unique shortcut code. This shortcut, when inserted into a docuplate or directly into a patient's chart, will automatically enter the corresponding information into the documentation (as shown in the previous example).
2. To download an item, highlight the desired item.
3. Click the Download button.

Creating a Docuplate the Contains Document Designer Commands



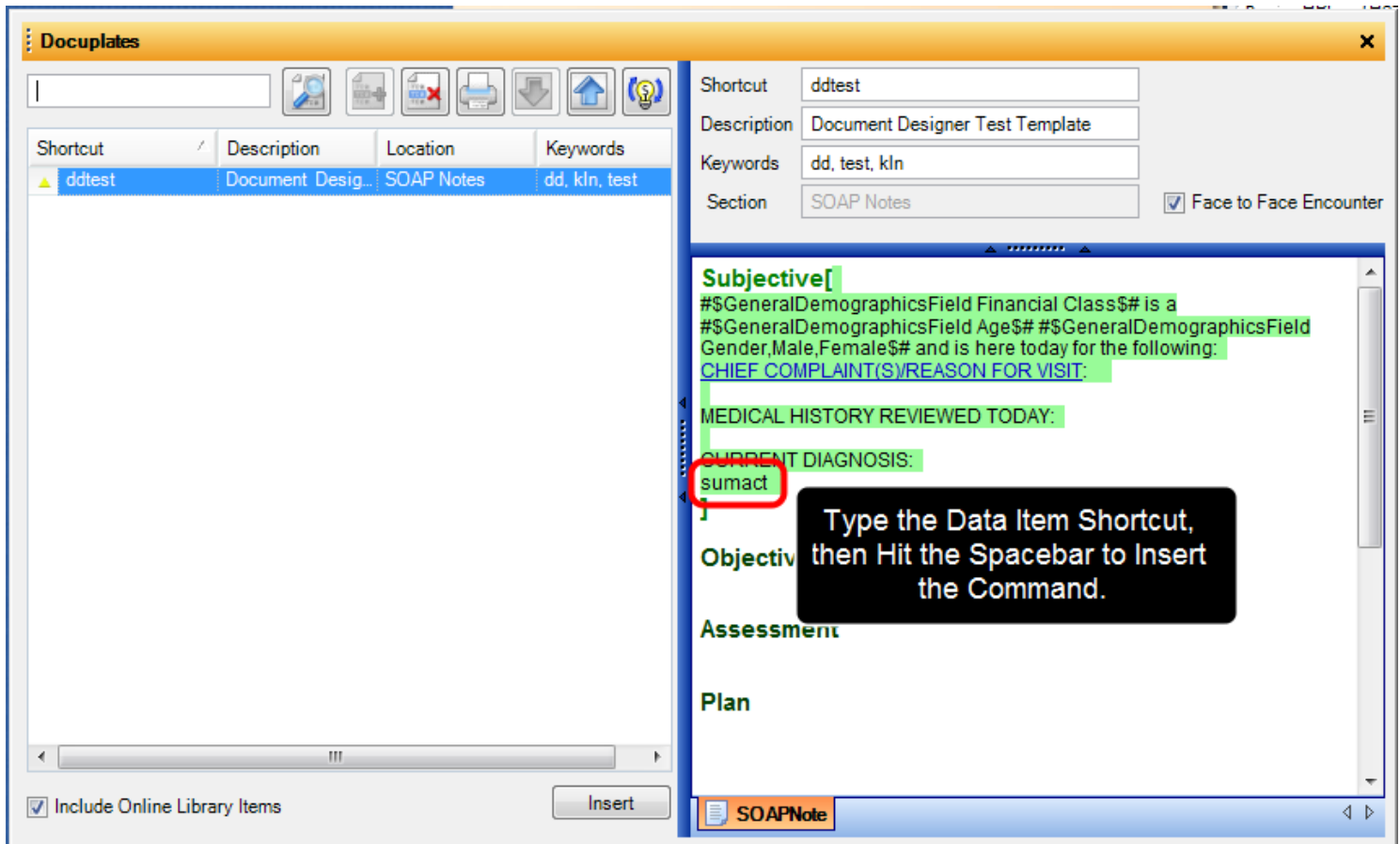
The following steps will guide the user thorough

1. Open a test patients chart
2. Create a new SOAPnote
3. Clear out all SOAP fields by going to Edit > Clear All SOAP Fields



Open the Docuplates Manager by going to Docutainers > Docuplates or by hitting F6 on the keyboard.

1. Click the New Docuplate button (green plus) to create a new blank docuplate.
2. Enter a Shortcut, Description and Keywords for the new docuplate.
3. Click OK.



Now that we have created a blank docuplate, we are ready to add the Document Designer data items to the docuplate. **Before adding in the document designer data item commands, remember to close the patient's chart that is opened in the background.**

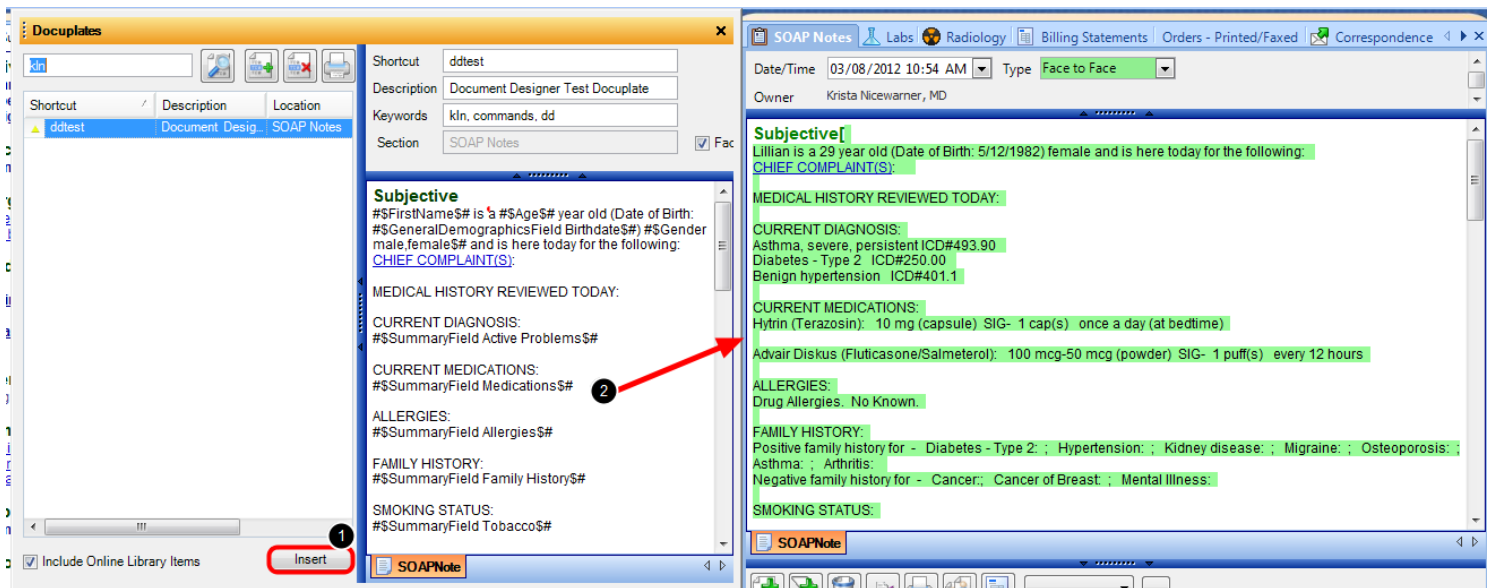
Within the Docuplates Manager (F6) select the new docuplate and edit it within the right side window. Create the docuplate as desired while inserting necessary data item commands using their shortcut codes. For example, type the shortcut code "sumact" then hit the spacebar. This will enter the data item command *#\$SummaryField Active Problems\$#* which will pull the information from the patient's SummaryActive Problems section and insert it into the SOAPnote once the docuplate is added to the encounter.

Continue creating the docuplate and inserting the shortcut for the desired data item commands. Once the docuplate is complete, it will be automatically saved within the Docuplates Manager.



***Note:** Remember that the patient chart must be closed to complete this process. If a chart is open behind the Docuplate Manager, that particular patient's information will be inserted into the docuplate rather than the data item command.

Insert the Edited Docuplate into a Patient's Chart



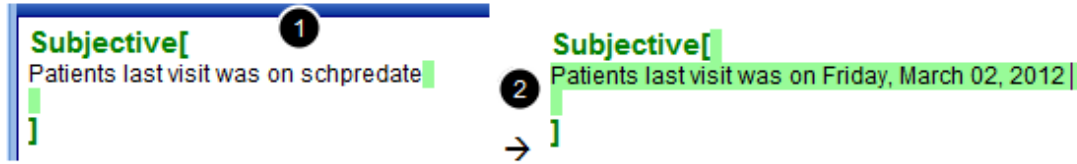
Once the user has finished creating the docuplate, it can be inserted into the chart.

1. Open a patient's chart and Click "Insert" within the Docuplates Manager
2. This will place the docuplate into the patient's chart and convert the data item commands into information that is pulled from other sections of SOAPware.

***Note:** Docuplates that contain data item commands, may be used as a user's default docuplate. However, these data item commands will NOT pull information into the patient's chart. In order for the data item commands to work, the docuplate must be inserted into the chart and not used as the default docuplate.



Inserting the Document Designer Data Items Directly into the Patient's Chart



Document Designer data items can also be inserted directly into the patient's chart using their shortcut code. For example, in the screenshot above, we can insert the patients last visit date using the shortcut code "schpredate".

To do this:

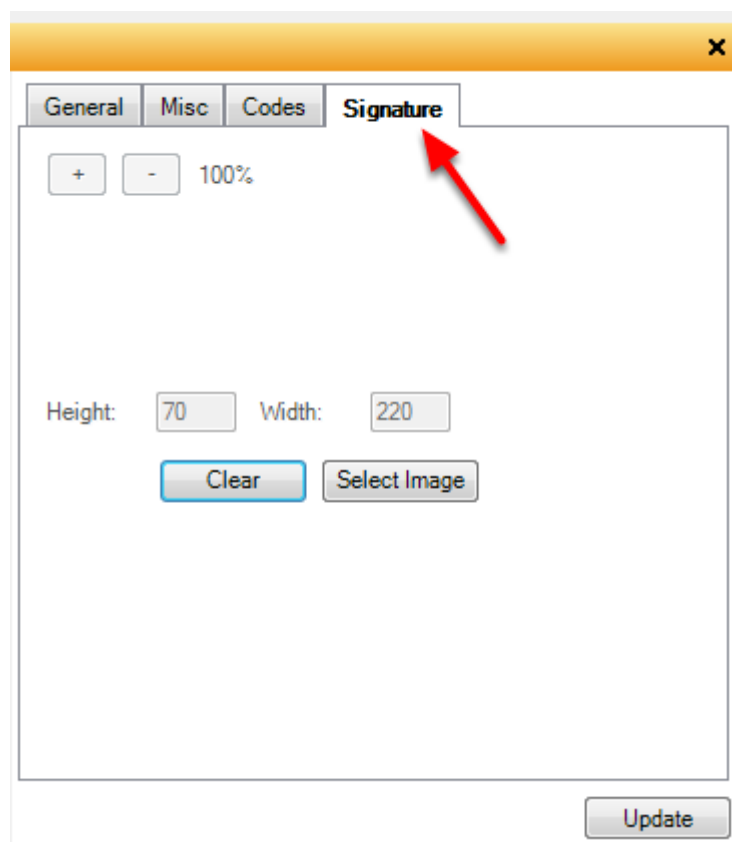
1. Type in the shortcut code "schpredate"
2. Hit the space bar on the keyboard to expand the shortcut code.



Creating a SMARText item for a Provider's Cursive Signature

This lesson will demonstrate how to create a SMARText item that contains a physician's cursive signature. In the lesson on [Provider Manager](#), it was demonstrated how to save the provider's signature into Provider Manager. This lesson will show how to take that signature, and create a SMARText item that can be placed into a docutainer.

Entering the Signature in Provider Manager



First scan the Providers signature using the scanners software, and save on the computer.

1. Click on the Select Image button.
2. Once the image has been located, double click to insert.
3. The image will not immediately be in view. Click on the button with the "-" sign repeated to re-size the image and bring it into view. Note that the size percentage changes as the image is

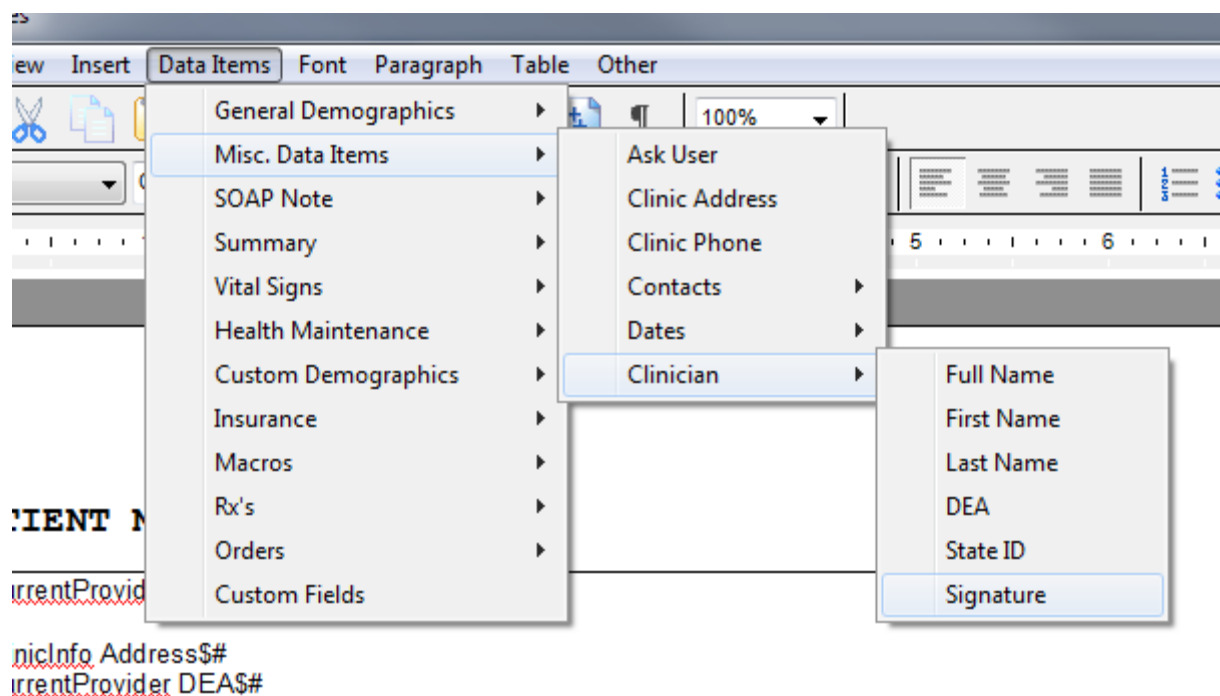


re-sized.

4. To save, Click the Update Button in the lower right hand corner.

To remove the image, simply Click on the Clear button.

Placing Signatures in a Document Design



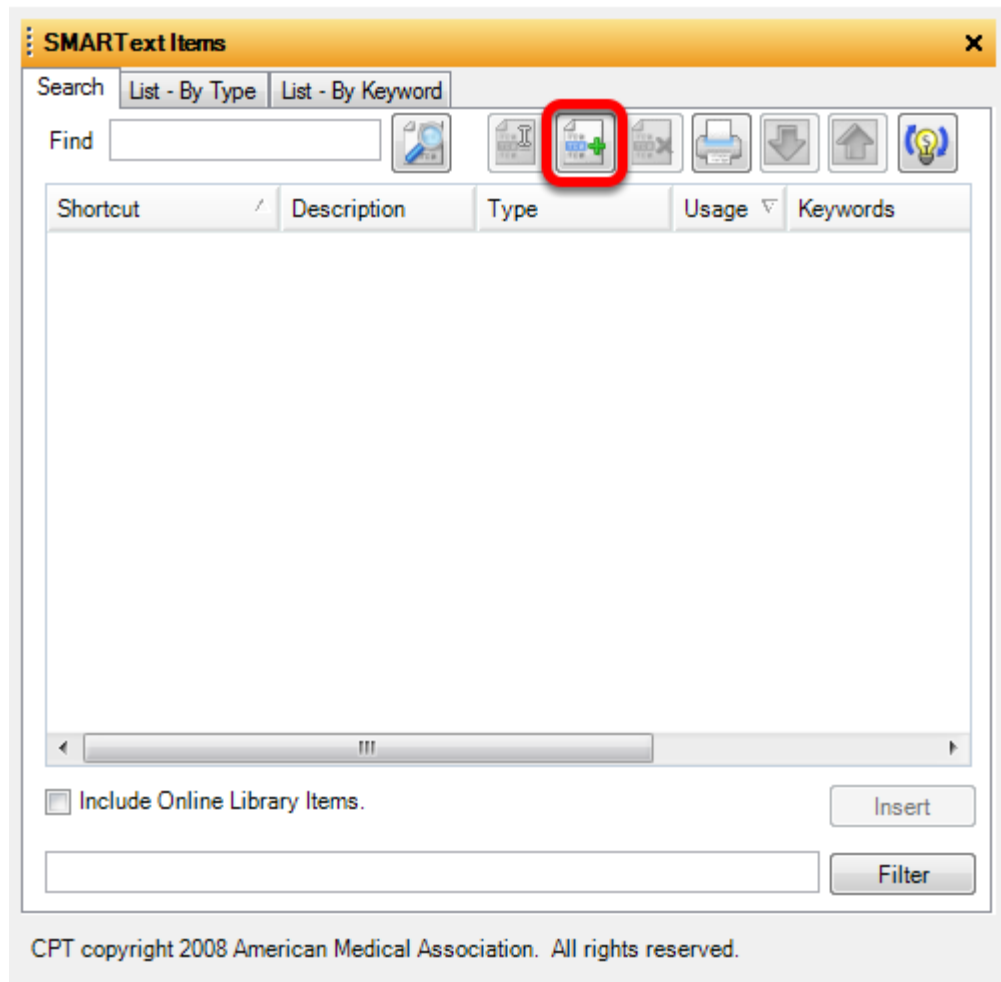
This signature can be placed in a document design for printing for faxing.

To insert a physician's signature on a document design, click Data Items > Misc. Data Items > Clinician > Signature

It is now possible to create a SMARTText Signature Item to insert the signature into any docutainer using a shortcut.

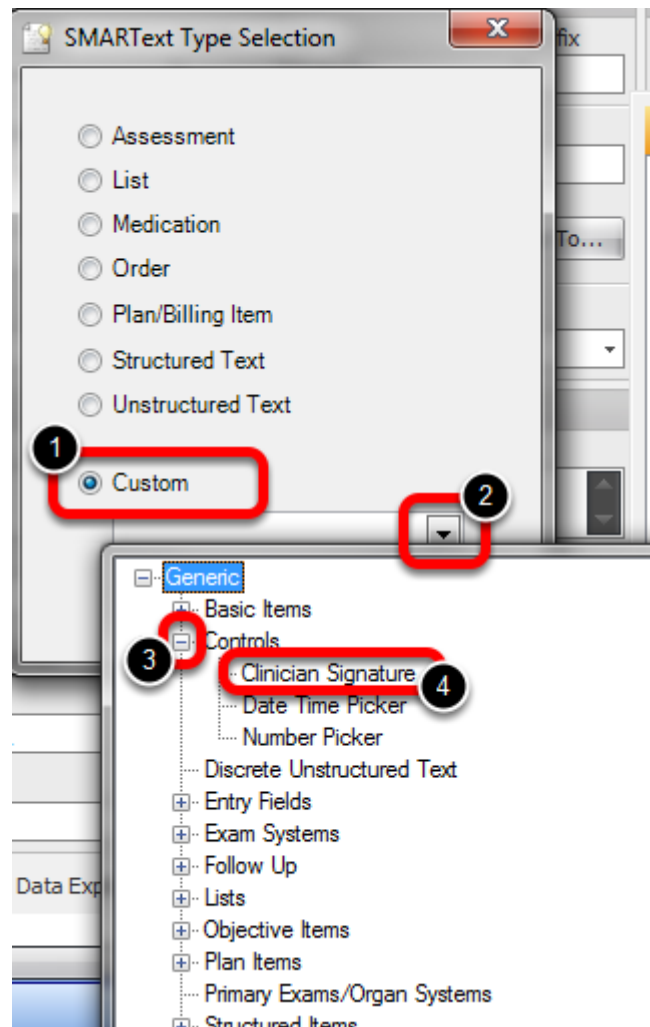


Creating a SMARText Signature Item



Open the SMARText Items Manager by choosing Docutainer > SMARText Items Manager, or Press F10 on the keyboard.

Click on the Green + to create a new SMARText Item.



To create a Signature item:

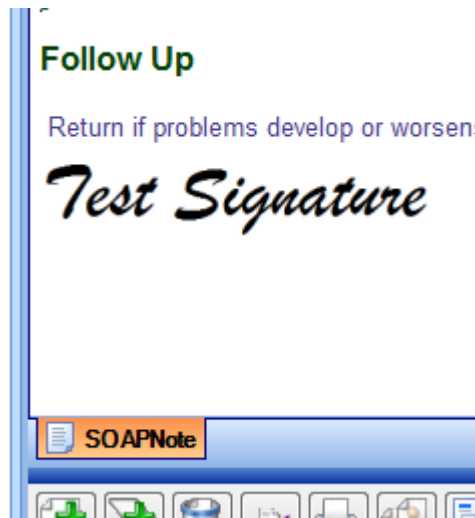
1. Click Custom
2. Click on the downward facing arrow to display list
3. Click on the node next to Controls
4. Select Clinician Signature

Click Create.



Enter the Shortcut, Description and Keywords. Do not fill out Display Header.

Click Save.



To insert the SMARTText item into the SOAPnote, type in the shortcut in one of the SOAPnote fields, and press the space bar.

The SMARTText Item will then be displayed in field.



Creating a Drug Course

A new concept for SOAPware 2010 and later versions is the ability to have pick lists of customized Drug Courses for each individual medication. Meaning, each Drug Course can be displayed using customized text in the format the user prefers.

What is a Drug Course?

What is a Drug Course? Drug Courses are the directions given (written) when prescribing a medication including, dose, route, frequency, substitutions, refills, etc.

Now, prescription details can match a format the prescribing clinician prefers.

For example, a Drug Course pick list item for Amoxicillin might include:

500mg tab, 1 tid, #30, Substitution-Allowed, R-0 or

250mg chewables 1 po tid for 10 days. Substitution-Not Allowed, 0 Refills

instead of:

500 mg (tablets) Dose- 1 each Freq- 3 times a day Route - orally Quantity-#30
Substitution-Allowed Refills- 0

Drug Courses

The user can create a prescription in whatever format is preferred, and have SOAPware store the values for future use. Even for the same drug, this process can be infinitely repeated to have as many different courses for that drug as desired. Subsequently, when the drug is prescribed, the user simply picks from the list of pre-defined Drug Courses in order to fill in all the prescription sub-items in one step.

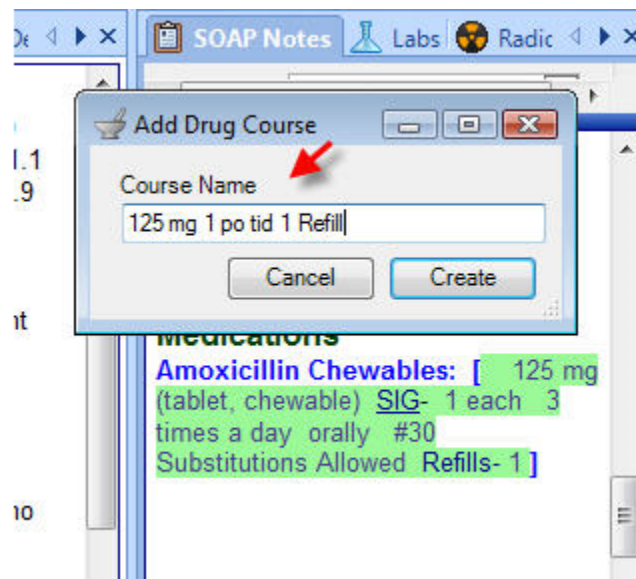
In earlier versions of SOAPware, the user had to first select the drug form, and then select a series of multiple sub-items for each Sig (i.e. Dose, Frequency, Route, etc.), dispense amounts, substitution status and refills. This created the need to have multiple, completed prescriptions for each medication, because a new one had to be created for each set of Form/Sig values.

Other considerations regarding Drug Courses include:



- * Many different medications can have the same Drug Course.
- * Drug Courses can be pre-defined, stored and selected via pick lists.
- * Selecting a particular Drug Course will automatically place that course's values into the prescription.
- * Each Drug Course can be displayed using a user's own custom text (500 mg. tablet BID or 500 mg tab bid etc.).

Creating Drug Courses



IMPORTANT: to use this feature optimally, go to the Tools menu > Options > Structured Rx > Click on the Headers tab and then make sure that there is NOT a check next to "Visible only when empty. Sig Header". Log out of SOAPware and log back in for this to take effect.

Insert SMARText medication into the medication field of the SOAPnote. To do this, type in the medication name and then press Shift F11 on the keyboard to search SMARText. Double click on the medication to insert it into the field.

Select the strength, SIG, Quantity, Substitutions and Refills.

Now, to create a new Drug Course, Right-click the drug name, and Click the Store Drug Course menu item. In the Store Drug Course dialog, Type the the Drug Course Description, for example, 125 mg 1 po tid. Click Create.



Create as Many Courses as Needed for the Medication

SMARTText Quick Access

Active Item: n Chewables 250mg #30 1 tid

Description	
>	X
one po bid for 10 days	X
125 mg 1 po tid 1 Refill	X
400mg 1 po tid, no R...	X

Repeat the above steps for as many Drug Courses as needed for the medication.

Removing a Course

To remove a course, Click the X that is located in Quick Access next to the Description of the one to remove.

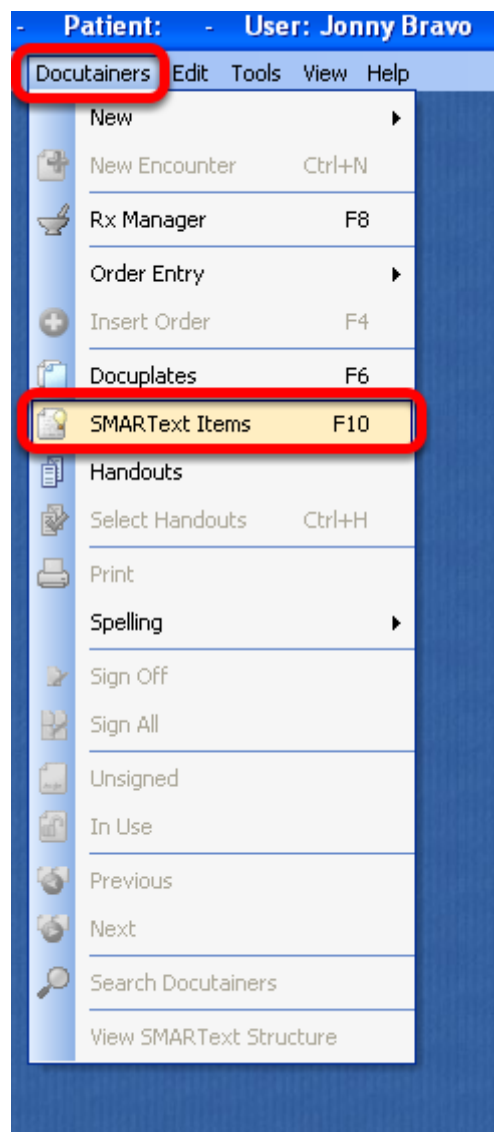


Creating SMARText Prescriptions for Durable Medical Supplies

Durable Medical Supplies can now be created as SMARText Items and **printed** or **faxed** from the Rx Manager.

In this lesson we are going to create a prescription for Lancets.

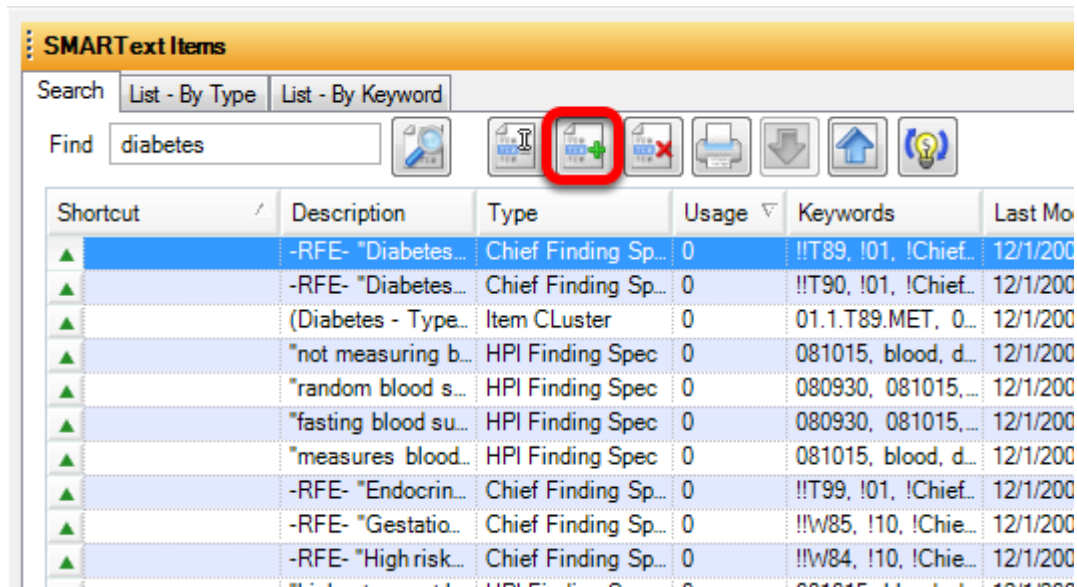
Accessing the SMARText Items Manager



- 1) Click on Docutainers on the Menu Bar
- 2) Click on SMARText Items

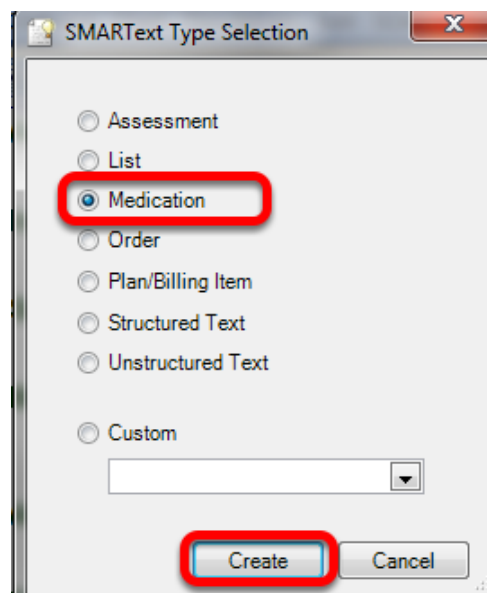


Creating a New Item



1) Click on the Green + to create a Medication Item.

***Note:** this should only be done when creating DME Items. Prescription medications should be duplicated and then edited. See [Creating SMARTText Items in the SMARTText Items Manager](#).



1) Click the radio button next to Medication.

2) Click Create.



SMARText Designer

Shortcut: 1

Description: 2

Keywords: 3

☒ Display Header 4 ☐ only when item is empty.

Advanced

General

Item Type:

Strength- Sig- Quantity- Substitution- Refills- Related Dxs- Start Date- End Date- Comment- Notes-

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

☐ Separate Lines

- 1) Enter Shortcut
- 2) Enter Description.
- 3) Enter Keywords
- 4) Check Box next to Display Header and Enter "Diabetic Testing Supplies."



Entering the Strength

The screenshot shows the SMARText Designer window. The 'Item Type' field is highlighted with a red box and a circled '1'. The 'Item Comment' dialog box is open, showing the text 'Lancets and Strips' in the comment field, which is also highlighted with a red box and a circled '2'. The 'Save' button in the dialog box is highlighted with a red box and a circled '3'.

- 1) Left-click on Strength to bring up the Item Comment box.
- 2) Type in the Item Comment box "Lancets and Strips."
- 3) Click Save.



Entering the Sig

The screenshot shows two windows from the SOAPware application. The 'SMARTText Designer' window on the left has the 'General' tab selected. It contains fields for 'Shortcut' (diatestsup), 'Description' (Diabetic Testing Supplies), 'Keywords' (diabetic, test, supplies, supply, niddm, durable, medical, diabetes, iddm, glucose, jberg, itg), and 'Display Header' (Diabetic Testing Supplies). Below these is an 'Item Type' dropdown menu. The main text area shows a sample of the generated text: 'Diabetic Testing Supplies Lancets and Strips SIG- [qid ac and hs] Dispense- Substitutions- Refills- 0 Related Dxs- Start Date- 8/03/2010 End Date- Comment- Notes-'. A red circle with the number '1' is placed over the 'SIG-' text. The 'SMARTText Quick Access' window on the right has a table with the following data:

Shortcut	Description	
	Empty SIG	×
struct	Insert Structu...	×
	qid ac and hs	×
		×

Red circles with numbers 2, 3, and 4 are placed over the 'qid ac and hs' row, the 'Empty SIG' row, and the 'qid ac and hs' row respectively.

- 1) Left-click over Sig.
- 2) Create a new Sig by clicking in the blank sig line in the SMART Quick Access and enter personal Sig.
- 3) Click on the Empty SIG to save the newly created sig.
- 4) Click on the sig created to Insert this into the SMARTText item.

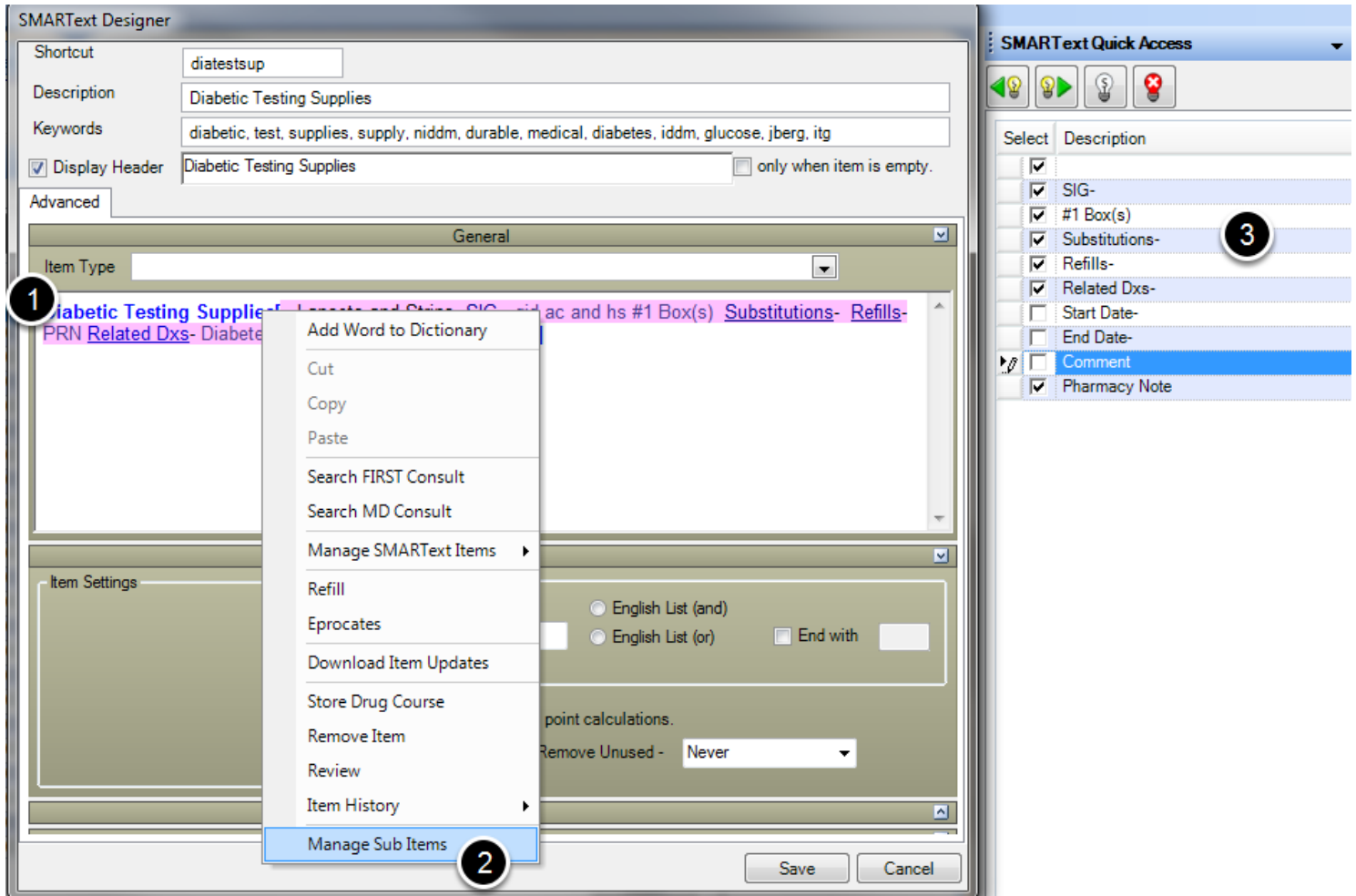
Fill out Remaining Items

The screenshot shows the 'SMARTText Designer' window with the 'General' tab selected. The 'Display Header' is 'Diabetic Testing Supplies'. The 'Item Type' dropdown is set to 'General'. The main text area shows the updated text: 'Diabetic Testing Supplies Lancets and Strips SIG- qid ac and hs #1 Box(s) Substitutions- [] Refills- PRN Related Dxs- Diabetes - Type 2 - uncontrolled Start Date- 8/03/2010 End Date- Comment- Notes-'. The text is now more complete, with 'qid ac and hs #1 Box(s)' added after the signature and 'Diabetes - Type 2 - uncontrolled' added after the related diseases.

Fill in Dispense number, Substitutions, and Refills.

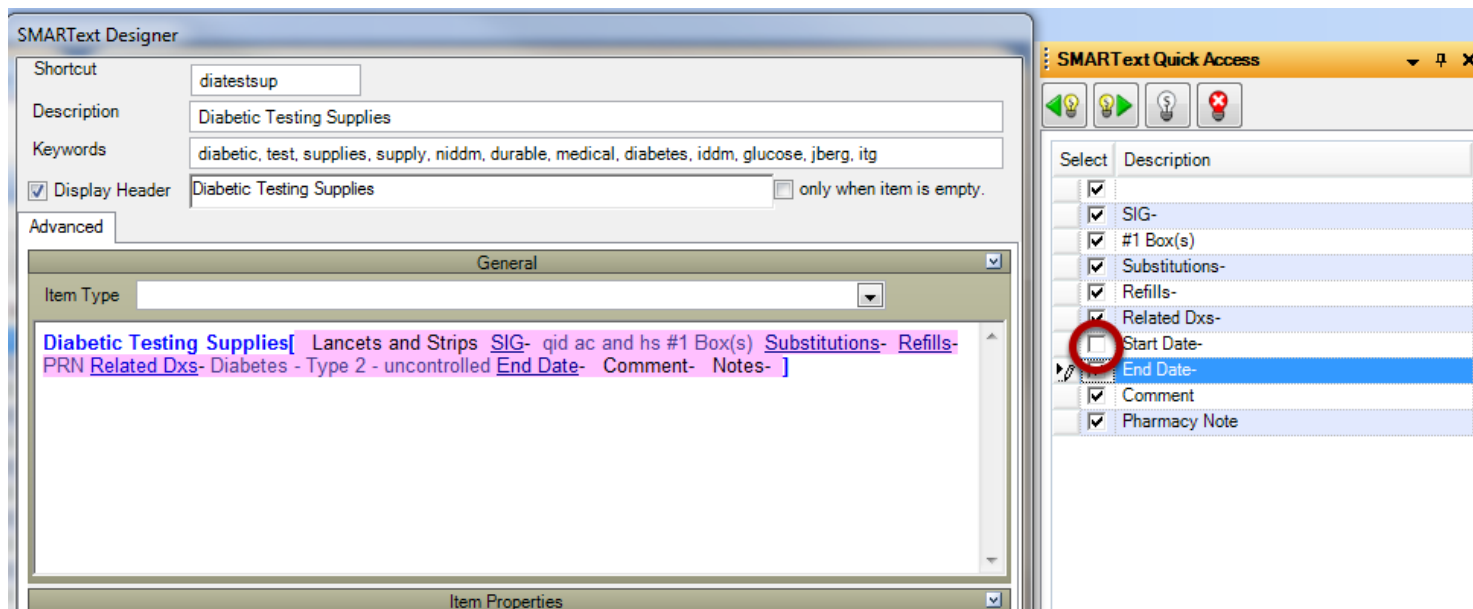


Removing Sub Items



The SMARTText item will have sub items associated with a medication.
To remove the sub items not needed:

- 1) Right-click over the SMARTText header.
 - 2) Choose "Manage Sub items."
 - 3) In the SMARTText Quick Access, un-check the sub items not needed, leaving only the sub Items Strength, Sig, Quantity, Substitutions Refills, and Related Dx.
- DO NOT CLICK SAVE AT THIS POINT**



Users are to un-check items he/she does not wish to display on the prescription such as: Start Date and End Date, Comments.



Saving the Item

SMARText Designer

Shortcut:

Description:

Keywords:

☒ Display Header: ☐ only when item is empty.

Advanced

General

Item Type:

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused -

Coding / Notes

Structure Viewer

Save Cancel

Complete the item and ensure that the item looks as it should be prescribed.
Hit Save.



Inserting the Prescription into the Chart

Medications[

diatestsup

]



Medications

Diabetic Testing Supplies Lancets and Strips SIG- qid ac and
hs #1 Box(s) Substitutions- Refills- PRN Comment- Notes-

In the Medication field of the SOAPnote, enter the shortcut, followed by the space bar.



Related Diagnosis

Date/Time 08/03/2010 9:42 AM

Subjective

Objective
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

Assessment
Diabetes - Type 2 - uncontrolled ICD#250.02

Plan

Medications
Diabetic Testing Supplies Lancets and Strips, SIG, aid as and
hs #1 Box(s) Subs

Follow Up
Return if problems occur

SOAPNote

Drag a column header

Date/Time
8/3/2010 9:42:55
8/2/2010 9:40:27

Rx Manager

FR

Select Description

- ☒ SIG-
- ☒ #1 Box(s)
- ☒ Substitutions-
- ☒ Refills-
- ☐ Related Dx-
- ☐ Start Date-
- ☐ End Date-
- ☒ Comment
- ☒ Pharmacy Note

1

2

3

If the patient, insurance or pharmacy require a Related diagnosis:

1) Right-click on the Item Header.



- 2) Select "Manage Sub Items."
- 3) Check "Related Dxs" in the SMARText Quick Access.

** In the Default Layout (Tools > Options > Structured Rx) if the user has Related Diagnosis checked, this will automatically display Related Diagnosis and the user will not need this step**



1) Press the F8 key on the keyboard (or right-click over the Medication field header and choose Rx Manager) to bring up the Rx Manager. The dose will say "Strength Comment Not Allowed". This warning will not affect printing or faxing the prescription.



- 2) Click on the drop-down arrow next to the Submit Button.
- 3) Choose Print or Fax.

Item Sent

Rx Manager						
Rx Pad Medications History Patient - Refill Requests						
Drag a column header here to group by that column						
Action	Drug	Status	Details	Notes	Pharmacy	Ren
Type	Sent	Response				
	Fill Date	Provider				
Refill	Diabetic Testing ...	Sent	Strips and Lancets SIG- bid ac and hs #1		*Fake SOAPware	
Printed	8/3/2010	Unknown	Box(s) Substitutions Allowed Refills- PRN		Pharmacy	
	1/1/0001	98597f08-4f1e-4...	Related Dxs- Diabetes - Type 2 - uncontrolled Notes-		Ph# - 8662370973	
Refill	Diabetic Testing ...	Sent	Strips and Lancets SIG- bid ac and hs #1		*Fake SOAPware	
Faxed	8/3/2010	Unknown	Box(s) Substitutions Allowed Refills- PRN		Pharmacy	
	1/1/0001	98597f08-4f1e-4...	Related Dxs- Diabetes - Type 2 - uncontrolled Notes-		Ph# - 8662370973	

Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medication, etc.

The item has now been either faxed to the pharmacy or printed. The prescription will now display in the History tab of the Rx Manager.



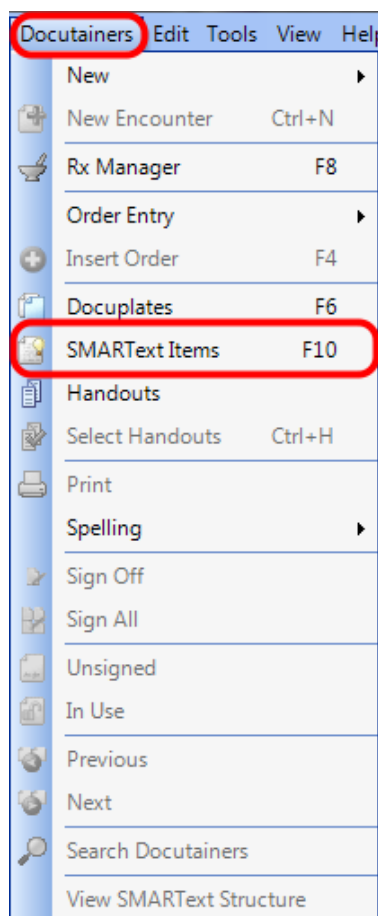
Creating SMARText Compound Medications

Many compound medications are not available in SMARText because they are unique to the patient.

Users can create SMARText compound medications to be used within the SOAPware Rx Manager. These SMARText items can then be printed or faxed from the Rx Manager; however they cannot be ePrescribed.

In this lesson we will learn how to create a SMARText prescription for a compound medication.

Accessing the SMARText Items Manager



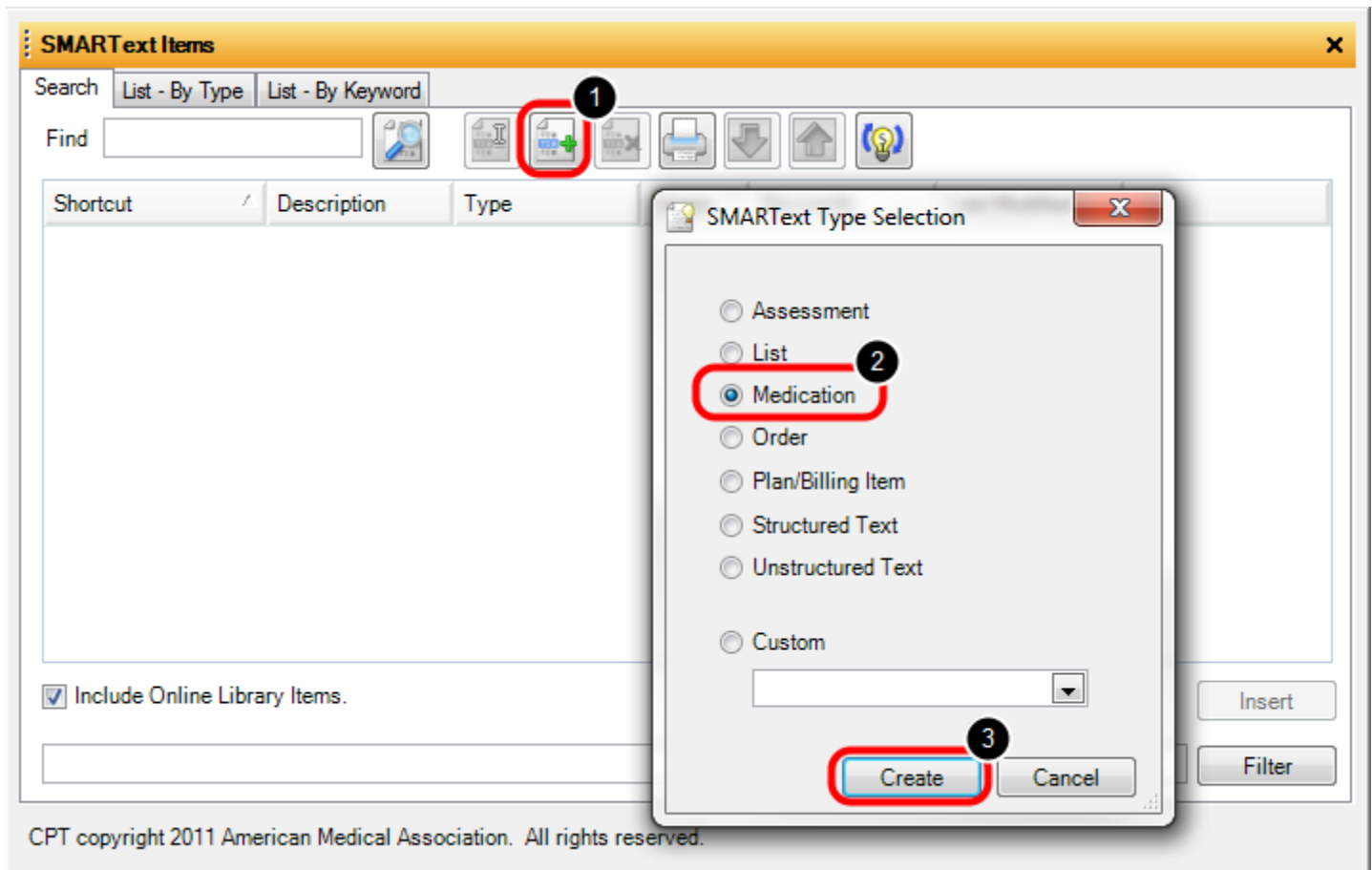
1. Click on the Docutainers menu in the Menu Bar.
2. Select SMARText Items



OR

Press **F10** on the keyboard to open the SMARText Items Manager

Creating a New Item



To create a new SMARText Item:

1. Click the Green + button
2. Select **Medication** from the SMARText Type Selection window
3. Click Create



SMARText Designer

The SMARText Designer window will appear. Next, the user will enter a Shortcut code, Description, Keywords and Display Header for the new compound medication.

1. **Shortcut Code:** The shortcut code should be a short code or macro that can be used to insert the newly created medication. SOAPware recommends that users not use actual words or medication abbreviations as shortcut codes.
2. **Description:** Enter a brief description of the compound medication.
3. **Keywords:** The keywords for an item will allow the user to search for the item at a later date. Keywords should each be one word separated by a comma and a space. SOAPware recommends that users create a "unique keyword" that they place on all SMARText items that they create.
4. **Display Header:** In this case, the display header should be the name of the compound medication.

Enter the Strength

1. Left-click on the Strength item and begin typing the dosage.
2. Type the appropriate dosage in the Strength Item Comment box.
3. Click Save.



Entering the Instructions

The instructions (including the dose, frequency and route) will be entered in the medication Sig.

1. Click on the Sig item and begin typing the instructions.
2. Type the appropriate instructions including the dose, frequency and route into the Item Comment box.
3. Click Save.

Complete the Remaining Items

Diphenhydramine 1% / Hydrocortisone 1% Cream 1% / 1% Cream SIG- Wash and dry affected area. Rub medicine in until evenly distributed. Apply to affected area no more than 2-3 times a day. #1 Tube(s) Substitutions Allowed Refills- 0 Notes-

Complete the remaining sub-items for the compound medication. This includes the Quantity, Substitution, Refills and Pharmacy Notes as needed.

***Note:** Sub-items that are not needed can be removed by right-clicking the sub-item, then selecting "Remove Item".



Save the New Compound Medication

SMARText Designer

Shortcut:

Description:

Keywords:

☒ Display Header ☐ only when item is empty.

Advanced

General

Item Type:

Diphenhydramine 1% / Hydrocortisone 1% Cream 1% / 1% Cream SIG- Wash and dry affected area. Rub medicine in until evenly distributed. Apply to affected area no more than 2-3 times a day. #1 Tube(s) Substitutions Allowed Refills- Notes-

Item Settings

Item Properties

Item Separators

☐ As Is ☐ English List (and) ☐ English List (or) ☐ End with

☒ Separate with ☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused -

Coding / Notes

Structure Viewer

To save the new compound medication, first, ensure that the medication appears exactly as it should be prescribed. Then Click Save.



Inserting the Compound Medication

Medications[
diphyd
]
→ **Medications[**
Diphenhydramine 1% / Hydrocortisone 1% Cream 1% / 1% Cream SIG- Wash and dry affected area.
Rub medicine in until evenly distributed. Apply to affected area no more than 2-3 times a day. #1 Tube(s)
Substitutions Allowed Refills- 0 Notes-

In the Medications field of the SOAPnote, enter the shortcut code for the new compound medication. Then hit the spacebar to expand the medication.



Sending the Prescription to the Pharmacy

Rx Manager F8 to open Rx Manager 1

Rx Pad Medications History Patient - Refill Requests

Pharmacy Use for Test / TEST PHARMACY (Ph#- 479-555-5555 Fax#- 479-555-8888) 123456 TEST TEST, AR 72703 2

Patient Information

Allergies
Penicillins Status- Active Type- Drug allergy

Notes

Add Rx Update Summary Interactions Show Header

Actions	Rx	Misc
<input checked="" type="checkbox"/> Unknown	Diphenhydramine 1% / Hydrocorti... 1% / 1% Cream Wash and dry affected area. Rub medicine in until evenly distributed. Apply to affected... #1 Tube(s) Substitutions Allowed 0	Pending 2/21/2012 TEST PHARMACY Remove Rx Krista Nicewarner Strength Comment Not Allowed Coverage Details

Retrieve Eligibility Info

Submit 4



Print 5
Fax
Samples

Once the medication is entered into the patient's chart and is ready to be sent to the pharmacy:

1. Press the F8 key on the keyboard to open the Rx Manager.
2. Select the desired Pharmacy.
3. Review the medication prior to submitting it. *Note: The medication will say "Strength Comment Not Allowed". This warning will not effect printing or faxing of the medication.
4. Click the drop-down arrow next to the Submit button.
5. Choose "Print" or "Fax" for the medication.



Item Sent

Actions	Rx	Misc	
 	Diphenhydramine 1% / Hydrocorti... ▾ 1% / 1% Cream ▾ Wash and dry affected area. Rub medicine in until evenly distributed. Apply to affected... ▾ #1 Tube(s) ▾ Substitutions Allowed ▾ 0 ▾	Printed TEST PHARMACY ▾ Krista Nicewarner ▾ Strength Comment Not Allowed Coverage Details	2/21/2012 ▾ Remove Rx
> Unknown			

The Rx Pad will now note that the medication has been submitted. If Printed, it will display "Printed. If faxed, it will display "Faxed".

Rx Manager ✕

Rx Pad Medications History Patient - Refill Requests

Drag a column header here to group by that column

Action	Drug	Status				Remove
Type	Sent	Response	Details	Notes	Pharmacy	
	Fill Date	Provider				
Refill	Diphenhydramine 1%...	Sent	1% / 1% Cream SIG- Wash and dry affected area. Rub medicine in until evenly distributed. Apply to affected area no more than 2-3 times a day. #1 Tube(s)		TEST PHARMACY Ph# - 4795555555 Fax# - 4795558888 123456 TEST	✕
Printed	2/21/2012 3:29:33 PM	Unknown ▾ Krista Nicewarner				

Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history

In addition, the medication will be stored in the Rx Manager history and the Summary can be updated.



Create a Custom CPT Code

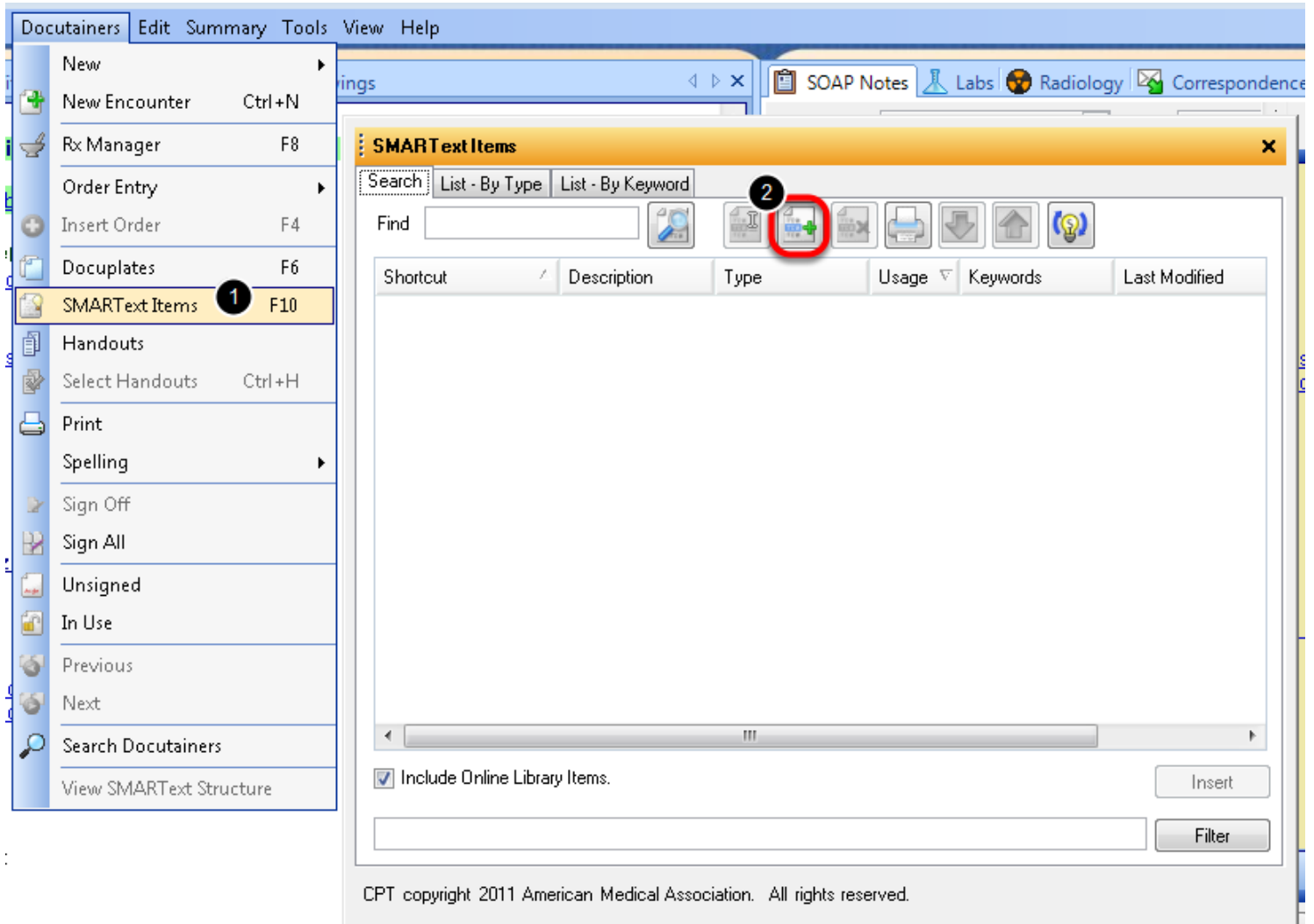
This lesson will explain to the user, the steps on how to create custom CPT codes, should a CPT code not be found within the SOAPware Online Library.

SOAPware always advises searching for CPT codes on the SOAPware Online library. All nationally recognized CPT codes will be available on the online library to download for use in the clinic. If a user discovers a nationally recognized CPT code that is not on the online library, please contact clinicaltraining@soapware.com rather than completing the steps in this lesson.

However, in some states or individual practices, there are specific custom CPT codes for various items that are not nationally recognized. Typically these codes will begin with a W, X, Y or Z. These could also include retail items sold at a clinic, which would not be filed with insurance. Follow the steps below to create a custom CPT code.



SMARText Items Manager

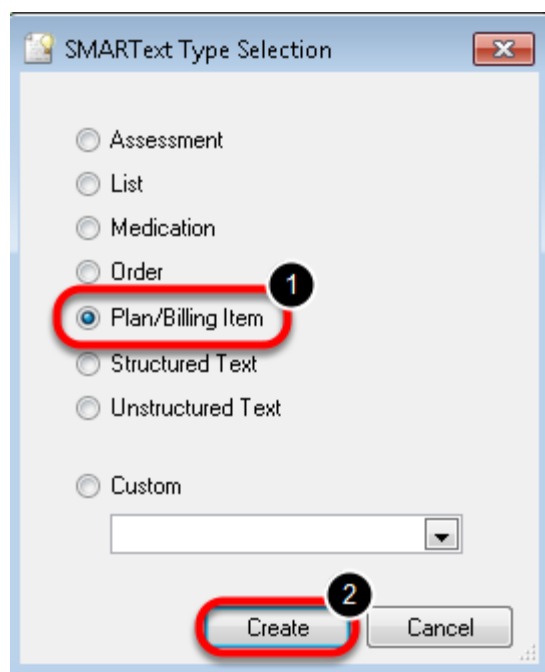


All SMARText items are created within the SMARText Items Manager.

1. Open the SMARText Items Manager by pressing **F10** on the keyboard, or by selecting **Docutainers > SMARText Items**, from the menu bar.
2. Click the **Green +** button to create a new item.



SMARText Type Selection



1. Select Plan/Billing Item
2. Click Create



SMARText Designer: Create a Custom CPT Code

SMARText Designer

Shortcut: 1

Description:

Keywords:

☒ Display Header: ☐ only when item is empty.

Advanced

General

Item Type:

Custom Training CPT Code

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused -

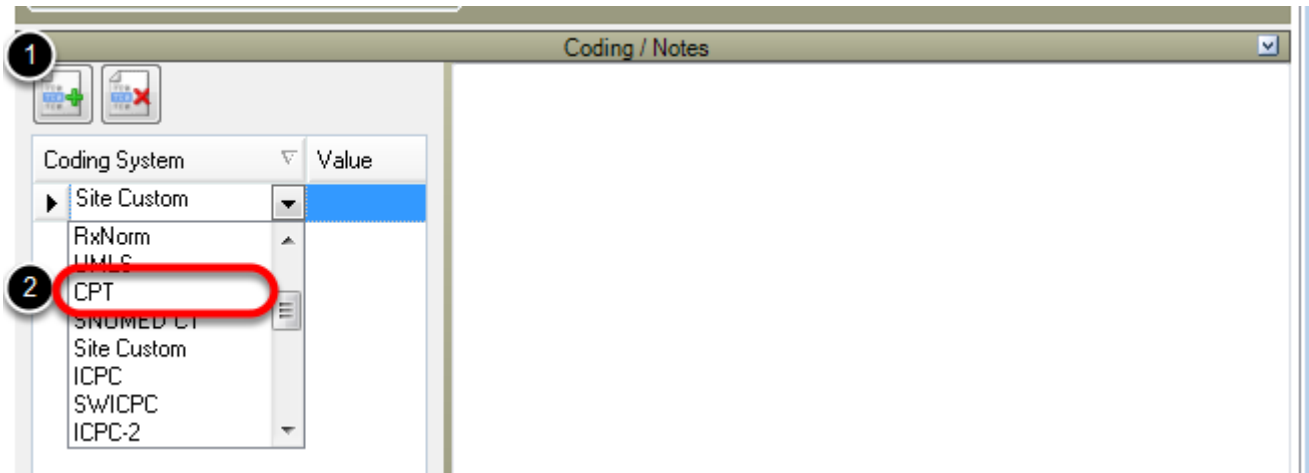
Coding / Notes 2

Structure Viewer

1. Complete the Demographics for the code including the Shortcut, Description, Keywords (be sure to include a unique keyword for searching purposes) and a Display Header.
2. Open the Coding/Notes area of the SMARText Designer by Clicking on the drop-down arrow to the right of this area. (This may require re-sizing the boxes within the Designer to view the Coding/Notes section).



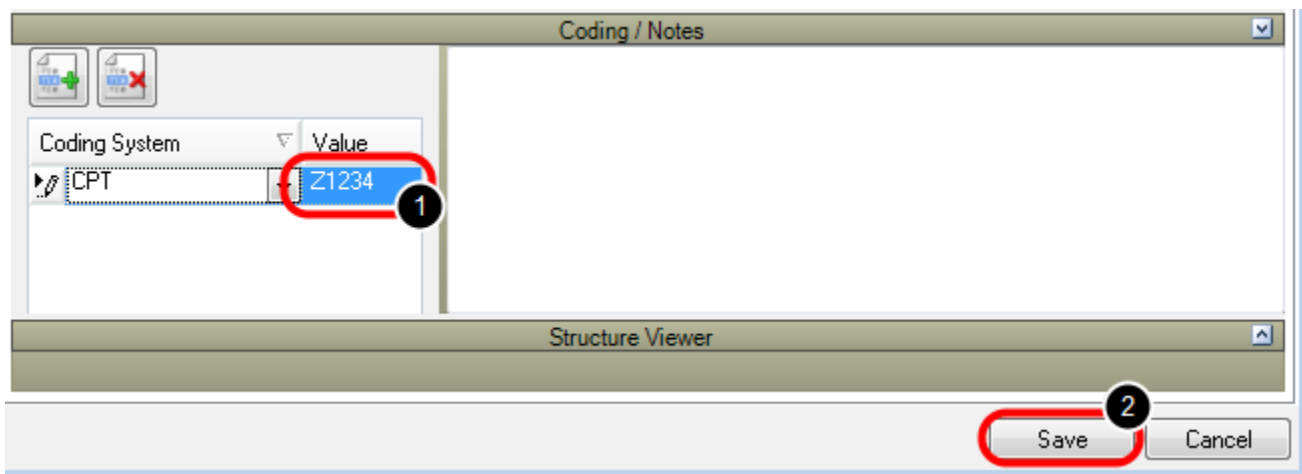
Coding/Notes



In the Coding/Notes Section:

1. Click on the **Green +** to create a new coding item
2. Select "**CPT**" from the coding drop-down list

Coding/Notes Value



1. Insert a value for the CPT code directly into the "Value" box
2. Click Save



Insert the Custom CPT Code

Plan

Custom Training CPT Code #Z1234 [Related Dxs-](#) [Modifiers-](#)

... ..

Insert the shortcut of the custom CPT code into the Plan section of a SOAPnote, followed by the spacebar. This action inserts the newly created CPT code into the patient's chart.

***Note:** *This CPT code will be transferred to the billing statement when the statement is created for the visit.*

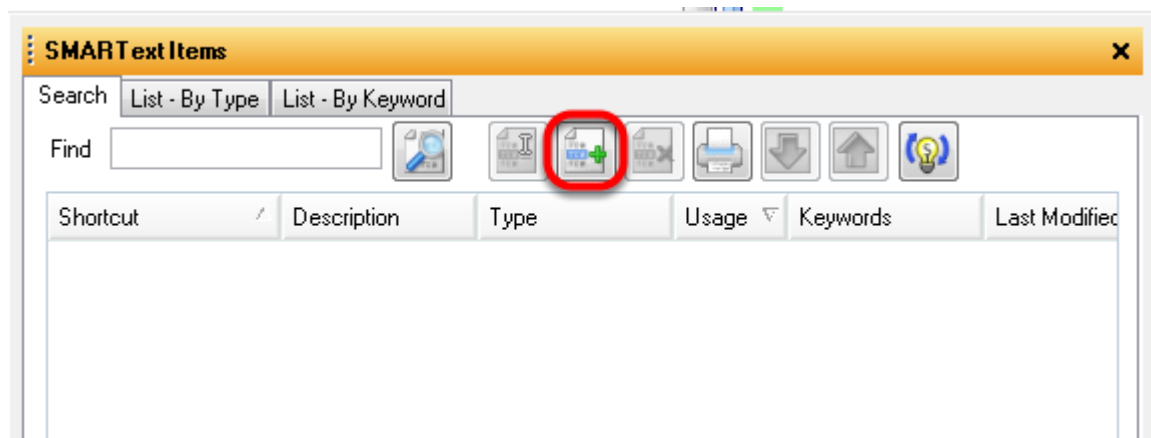


Creating Custom Order Entry Items

This lesson will show how to create a custom Order Entry item. These custom order entry items may be used to place orders in the Order Manager.

***Note: Items created via this lesson WILL NOT Calculate for Meaningful Use, they are not meant to transfer to the Billing Statement and are not meant to be used with the SOAPware Practice Management System.**

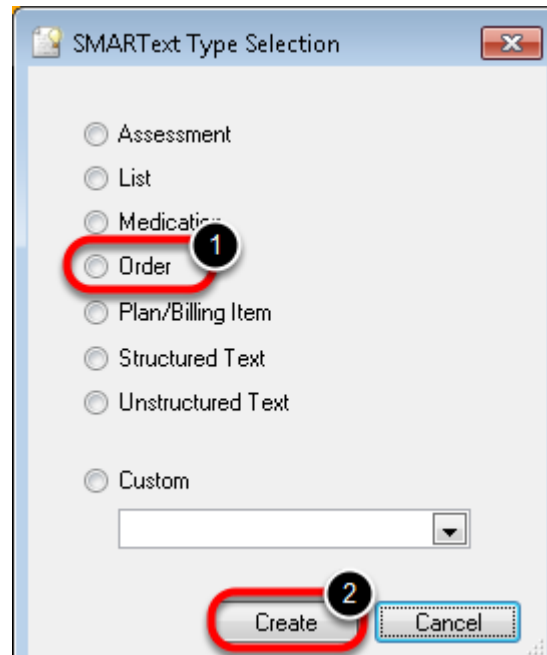
Open the SMARText Items Manager



Press the **F10** key to open the SMARText items Manager then, click the **Green +** button to create a new SMARText item.

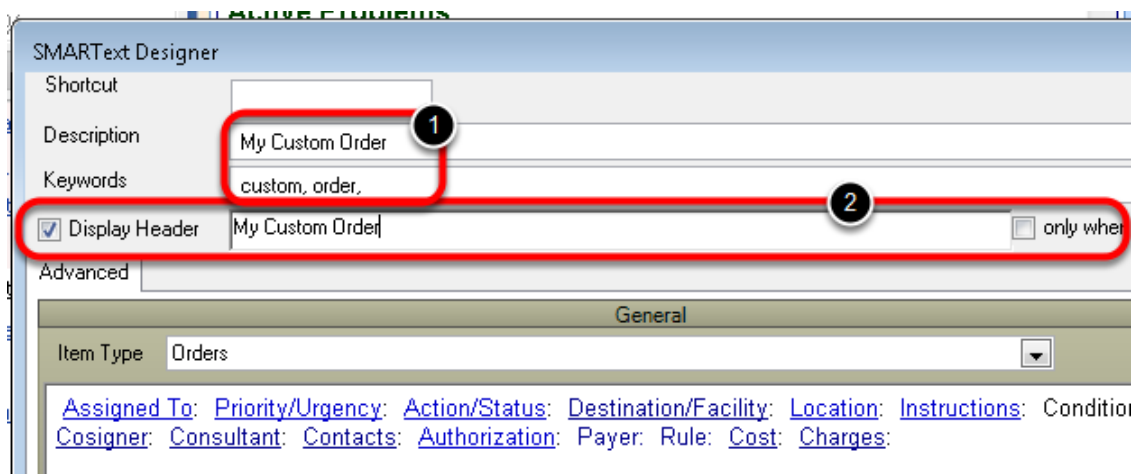


Select Order Type



1. In the SMARTText Type Selection select **Order**
2. Click **Create**

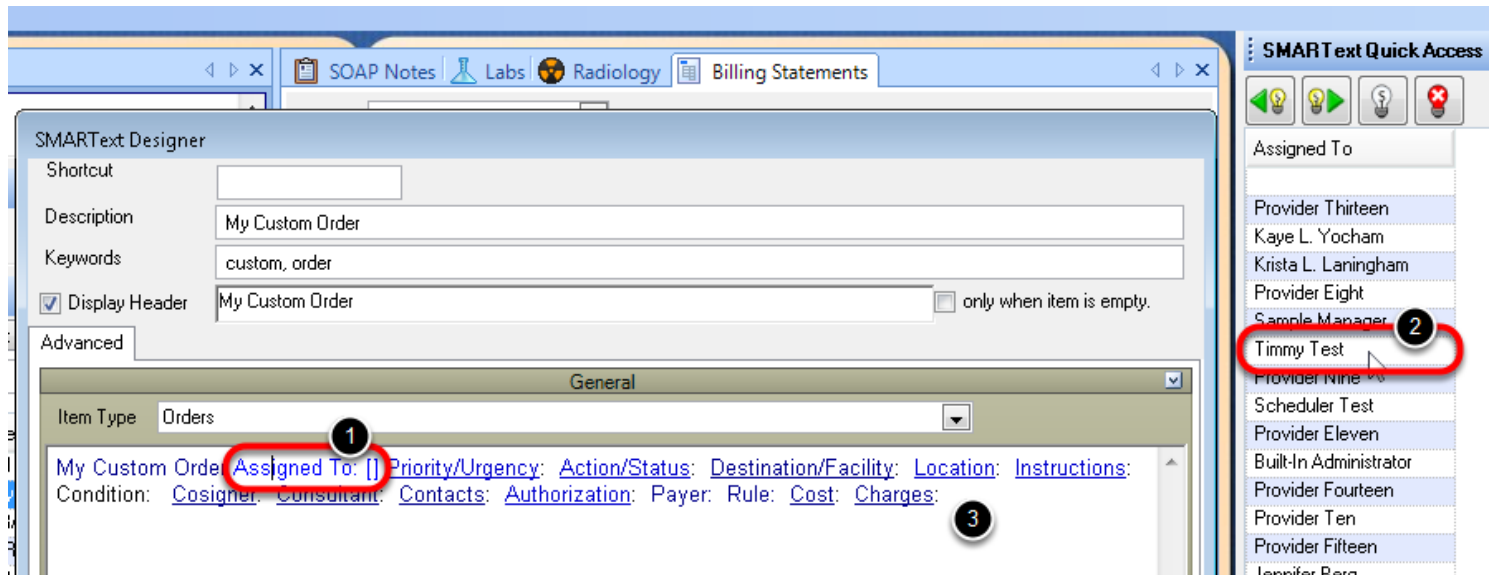
Enter Order Information



1. Enter the Description and Keywords for this item.
2. Check the Display Header check box and enter a Header for the order. Make sure the "only when empty" box is not checked.



Enter customizations



Customizing the sub-items will allow information to be pre-populated when the item is inserted into the Order Manager.

1. Click on the sub-item
2. In the SMARTText Quick Access, select desired information
3. Complete other sub-items as desired.



Enter Coding

SMARTText Designer

Shortcut:

Description: My Custom Order

Keywords: custom, order

☒ Display Header: My Custom Order ☐ only when item is empty.

Advanced

General

Item Type: Orders

My Custom Order [Assigned To:](#) [Priority/Urgency:](#) [Action/Status:](#) [Destination/Facility:](#) [Location:](#) [Instructions:](#)
Condition: [Cosigner:](#) [Consultant:](#) [Contacts:](#) [Authorization:](#) Payer: Rule: [Cost:](#) [Charges:](#)

Item Properties

Item Settings

Dates Authorization Type

Due Date Months: 0 Days: Reminder Date Months: 0 Days:

Item Separators

☐ As Is ☐ English List (and)
☒ Separate with ☐ English List (or) ☐ End with
☐ Separate Lines

☒ Include in EM Coder point calculations.

Coding / Notes

Coding System Value

Site Custom	1234
CPT	12345
ICPC	x123456

Structure Viewer

Save Cancel

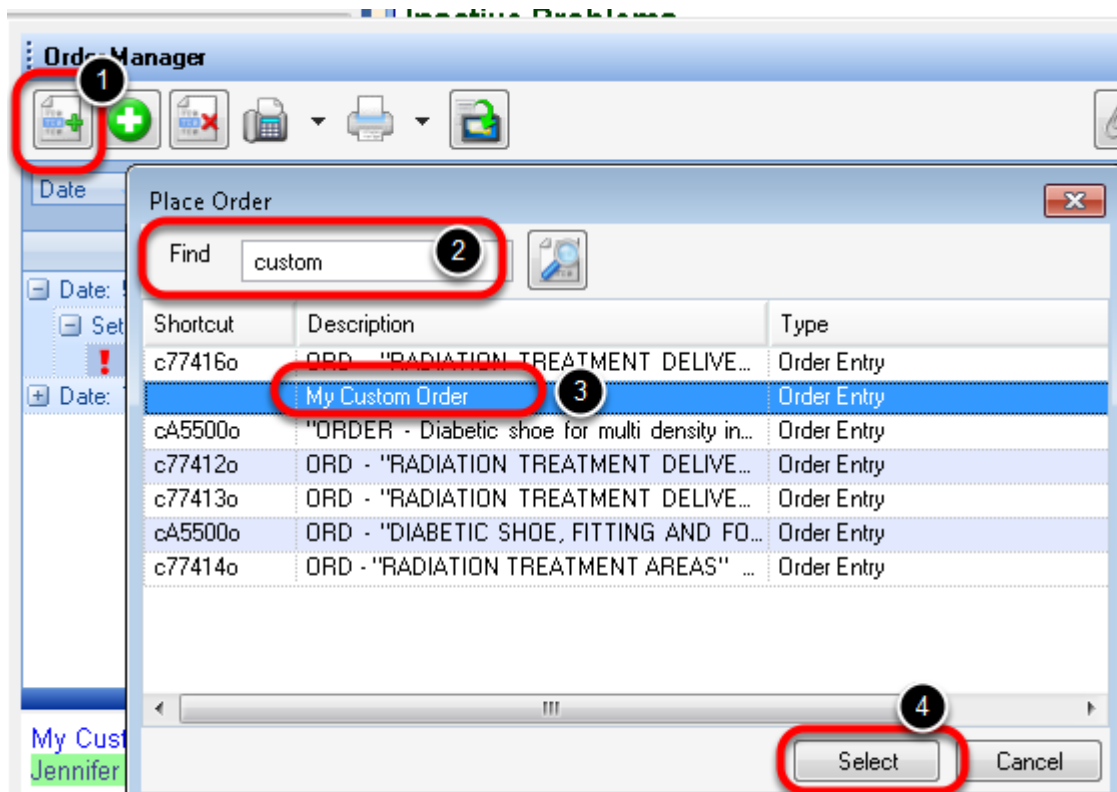
In some instances users will want to add coding to a custom order entry item. This may be a custom code, CPT code, or other type of coding.

1. Open the Coding/Notes Section



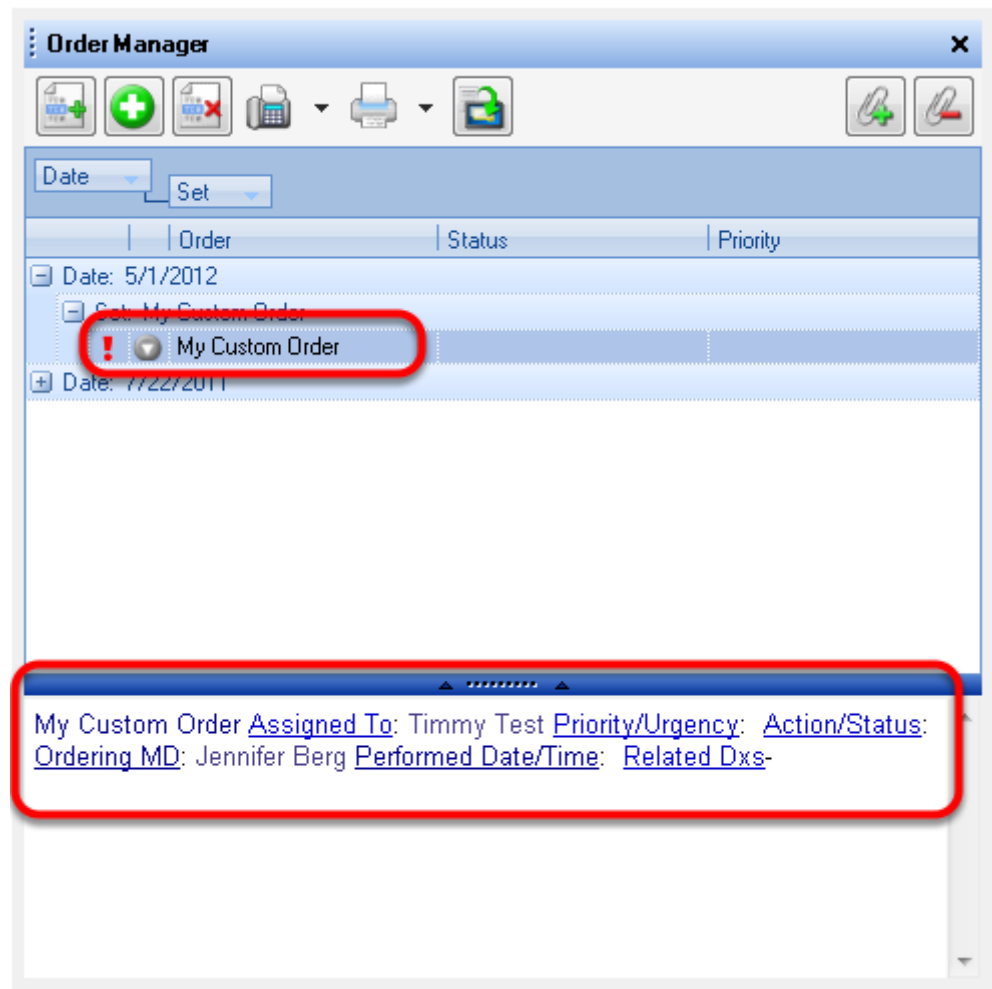
2. Click the Green + to create a new code
3. Select the desired coding type
4. Enter the code in the Value box
5. When finished click Save.

Place the Item in the Patient's Chart



The new custom order entry item may now be placed in the Order Manager. Open the Order Manager (Docutainers > Order Entry > Order Manager) the follow the steps below:

1. Click on the Green + to create a new order.
2. Enter a keyword to search for the new order item.
3. Highlight the desired item.
4. Click Select.



The custom order has now been inserted into the Order Manager for this patient. The order may now be completed and transferred to the patients SOAPnote.

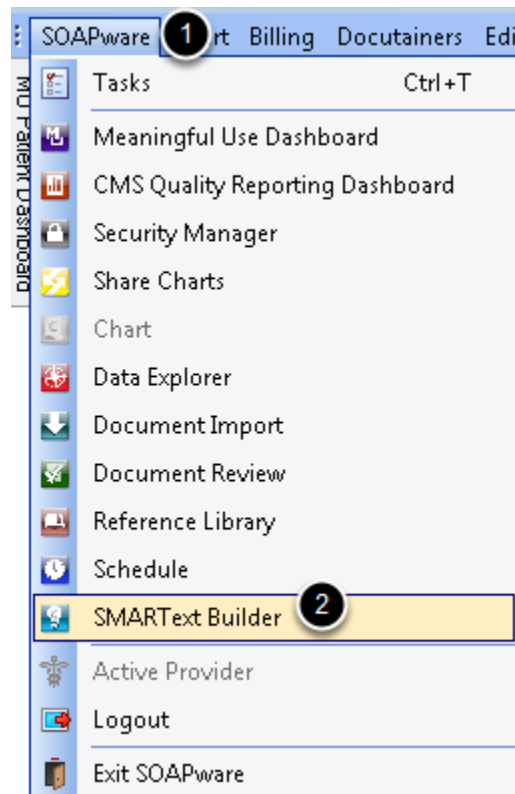


SMARText Builder



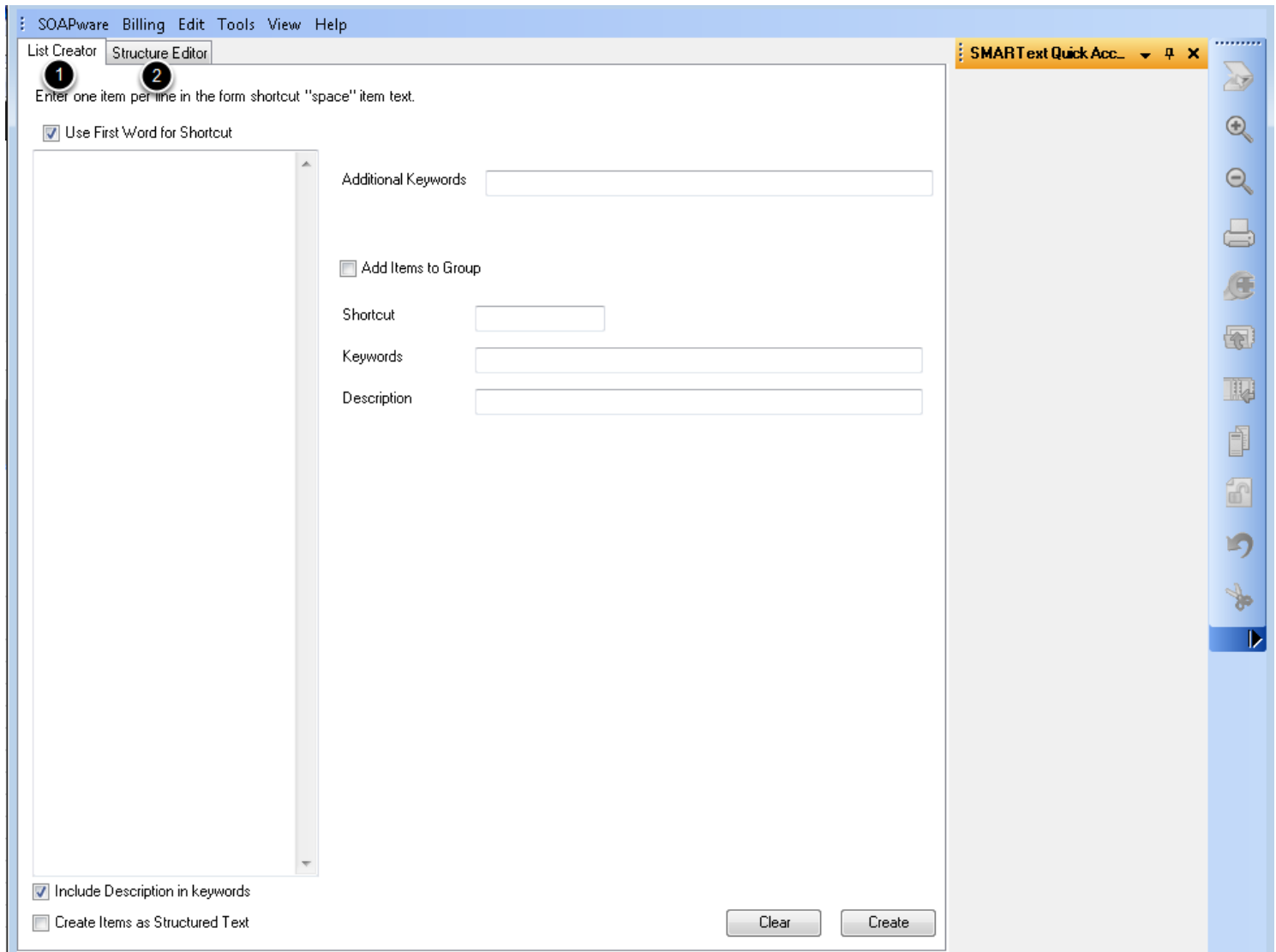
SMARText Builder Workspace

The SMARText Builder is a workspace within SOAPware designed to build advanced SMARText Items.



To Open the SMARText Builder Workspace:

1. Click on SOAPware menu item.
2. Select SMARText Builder



The SMARTText Builder contains 2 tabs.

1. **List Creator:** This area is used to create various SMARTText Lists.
2. **Structure Editor:** This area is used to create advanced SMARTText items including Order Sets and Item Groupers.



List Creator

The List Creator was designed to allow users to create multiple SMARTText items from an existing text list. It gives users the ability to copy and paste items from the existing text list (text or word processor document) and create SMARTText for each item.

With the List Creator it is possible to insert a long list of items and it will create all of those items individually. These items may then be directly inserted into the patients chart or added to a Pick list, bundle or cluster. The List Creator can also automatically create a bundle containing all of your items.



SOAPware Billing Edit Tools View Help

List Creator Structure Editor

Enter one item per line in the form shortcut "space" item text.

☒ Use First Word for Shortcut

Additional Keywords

☐ Add Items to Group

Shortcut

Keywords

Description

☒ Include Description in keywords

☐ Create Items as Structured Text

Clear Create

The large white text box on the left will be used to create or copy and paste the list of items. We will also use this box to create shortcut codes for each item.



Entering List Items

List Creator Structure Editor

Enter one item per line in the form shortcut "space" item text.

☒ Use First Word for Shortcut

Red
Yellow
Brown
Green
Pink
Blue
White
Black

Enter one item per line

To begin creating the new SMARText items:

1. Enter the text items into the large white text box as shown in the screenshot above.

***Note:** Enter 1 item per line by typing in the items or by copying and pasting an existing text list into the text box.

Adding a Shortcut for Each Item

Enter one item per line in the form shortcut "space" item text.

☒ Use First Word for Shortcut

ColRed Red
ColYel Yellow
ColBro Brown
ColGre Green
ColPin Pink
Colblu Blue
Colwhi White
ColBla Black

Each text item that was entered in the previous step, will also need a shortcut code. We will enter the shortcut codes before each text item followed by a space (as seen in the screenshot above).

In this example the shortcut would be "ColYel". When this shortcut is placed in the chart, the text "Yellow" will display. "Yellow" will also display as the Description for this SMARText item.



List Creator Structure Editor

Enter one item per line in the form shortcut "space" item text.

☒ Use First Word for Shortcut

ColRed	Red
ColYel	Yellow
ColBro	Brown
ColGre	Green
ColPin	Pink
Colblu	Blue
Colwhi	White
ColBla	Black

☒ Include Description in keywords 1

☐ Create Items as Structured Text 2

After all text and shortcuts are entered, preferences must be set for these items.

1. The "Include Description in Keywords" box will allow the user to search for the new SMARText item by using the items description (ex: Yellow).
2. The "Create Items as Structured Text" box will designate the new items to be created as Structured Text items. If this box is not checked the items will be created as Unstructured Text SMARText items.



Entering Keywords & Create the Items

Next, enter keywords for the new SMARText Items. Keywords will allow the user to search for the SMARText item within the SMARText Items Manager (F10).

1. Add the desired keywords into the "Additional Keywords" box. All keywords that are entered in this box will be added to each item in the list that is created. ***Note:** *Keywords should be one word separated by a comma and a space (as seen in the screenshot above).*
2. Once the items are completed, Click the Create button. This will create each item in the list as separate SMARText items.



Search List

Find colors

Shortcut	Description	Type	U
▲ ColBla	Black	Misc. (US)	0
▲ Colblu	Blue	Misc. (US)	0
▲ ColBro	Brown	Misc. (US)	0
▲ ColGre	Green	Misc. (US)	0
▲ ColPin	Pink	Misc. (US)	0
▲ ColRed	Red	Misc. (US)	0
▲ ColWhi	White	Misc. (US)	0
▲ ColYel	Yellow	Misc. (US)	0

SOAPware has now created an Unstructured SMARText item for each item. These items can be found in the SMARText Items Manager.



Creating a Bundle

SOAPware Billing Edit Tools View Help

List Creator Structure Editor

Enter one item per line in the form shortcut "space" item text.

☒ Use First Word for Shortcut

ColRed Red
CoYel Yellow
ColBro Brown
ColGre Green
ColPin Pink
Colblu Blue
ColWhi White
ColBla Black

Additional Keywords Colors, itg, 2012,

☒ Add Items to Group

Shortcut mycolors

Keywords my, colors, itg, 2012

Description My Bundle of Colors

☒ Include Description in keywords

☐ Create Items as Structured Text

Clear Create

The List Creator can also be used to create a Bundle that will include all of the Unstructured SMARText items.

To create a Bundle out of the SMARText items:

1. Check the "Add Items to Group" box. This will not only create the items individually as Unstructured text SMARText items, but it will also create one Bundle SMARText item that contains all of the Unstructured text items.
2. Enter a Shortcut, Keywords and a Description for the SMARText Bundle.
3. To save the item, Click the Create button.



Search **List**

Find

Shortcut	Description	Type	Usage	Keyword
▲ ColBla	Black	Misc. (US)	0	2012, E
▲ Colblu	Blue	Misc. (US)	0	2012, E
▲ ColBro	Brown	Misc. (US)	0	2012, E
▲ ColGre	Green	Misc. (US)	0	2012, C
▲ ColPin	Pink	Misc. (US)	0	2012, C
▲ ColRed	Red	Misc. (US)	0	2012, C
▲ ColWhi	White	Misc. (US)	0	2012, C
▲ ColYel	Yellow	Misc. (US)	0	2012, C
▲ mycolors	My Bundle of Co...	List Item Group	0	2012, c

☐ Include Online Library Items. Insert

Filter

When looking for these items in the SMARTText Items Manager (F10) under the common Keyword of "Colors", we can see that all of the new items are created including the SMARTText bundle that contains all of the unstructured items.



Viewing the Bundle

The screenshot shows the SMARTText Designer window. The main form has the following fields:

- Shortcut: mycolors
- Description: My Bundle of Colors
- Keywords: my,, colors,, itg,, 2012, mycolors
- ☐ Display Header: ☐ only when item is empty.

The Advanced tab is selected, showing two sub-tabs: General and Item Properties.

General Tab:

- Item Type: Item Bundle

Item Properties Tab:

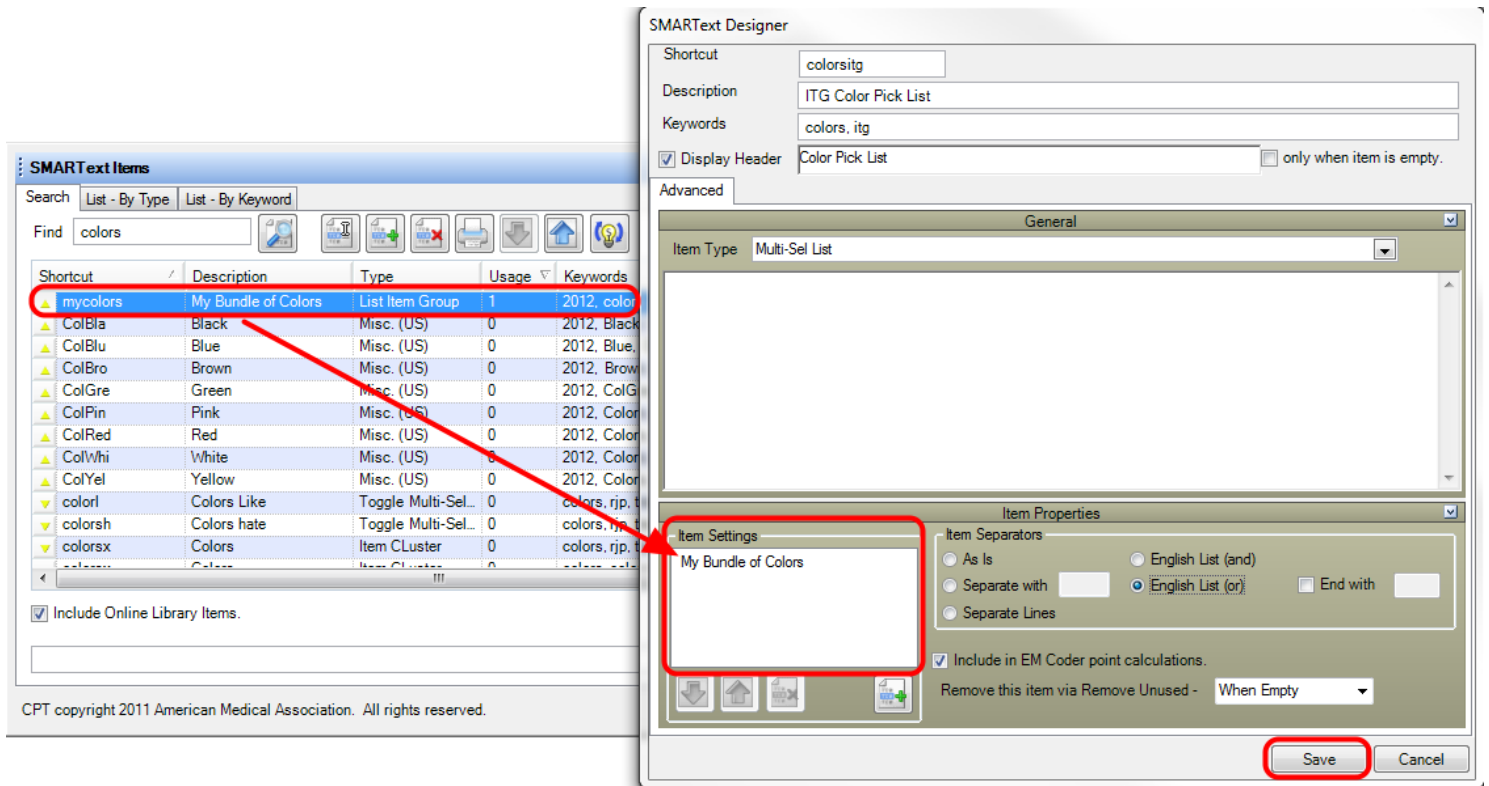
- Item Settings:** A list box containing the following items: Red, Black, Yellow, Brown, Green, Pink, Blue, White. This list box is highlighted with a red rectangle.
- Item Separators:**
 - ☐ As Is
 - ☒ Separate with: [text box]
 - ☐ Separate Lines
 - ☐ English List (and)
 - ☐ English List (or)
 - ☐ End with: [text box]
- ☒ Include in EM Coder point calculations.
- Remove this item via Remove Unused - [When Empty dropdown]

At the bottom right are Save and Cancel buttons.

All of the Unstructured text SMARTText items have been added to the Item Settings box in the newly created bundle. This bundle of SMARTText Items can now be placed into a pick list.



Placing the Bundle in a Pick List



After the SMARTText Bundle has been created, it can be placed into a pick list. To do this:

1. In the SMARTText Items Manager (F10), edit an existing pick list or create a new pick list. For instructions on how to create a pick list, please see: [Creating SMARTText Pick Lists](#).
2. Search for the new Bundle in the SMARTText Items Manager.
3. Drag and drop the bundle into the Item Settings box of the pick list (see screenshot above).
4. Click the Save button to save all changes.



Example of An Existing Bundle within a Pick List

The screenshot shows the SOAPware interface. On the left, the 'Subjective' section is highlighted, and the 'CHIEF COMPLAINT(S)/REASON FOR VISIT' pick list is circled in red. A callout box points to this pick list, stating: "The Chief Complaints item is a Pick List that contains a Bundle".

The SMARTText Quick Access window is open, showing the 'Active Item' as 'CHIEF COMPLAINT(S)'. The list of items includes various body systems (K - CARDIOVASCULAR, N - NEUROLOGICAL, P - PSYCHOLOGICAL, R - RESPIRATORY, S - SKIN, T - ENDOCRINE/METABOLIC/NUTRITIONAL, U - UROLOGICAL, W - PREGNANCY/CHILDBIRTH/FAMILY PLAN., X - FEMALE GENITAL, Y - MALE GENITAL, Z - SOCIAL PROBLEMS, I - MUSCULOSKELETAL) and a bundle item: '(Most Common Chief Complaints BUNDLE)'. This bundle item is also circled in red.

The SMARTText Quick Access window is open again, showing the 'Active Item' as '(Most Common Chief Complaints BUNDLE)'. The list of items includes various SMARTText items (RFE - "Allergic rhinitis", RFE - "Back pain (lower or lumbar-sacral)", RFE - "Hypertension, uncomplicated", RFE - "Diabetes - Insulin dependent", RFE - "Diarrhea", RFE - "Earache or otalgia", RFE - "Fever", RFE - "Immunizations or boosters", RFE - "Vision Screening"). A callout box points to this list, stating: "The Bundle contains several additional SMARTText Items."

An example of how bundles can be used in pick lists is the "CHIEF COMPLAINS/REASON FOR VISIT" pick list. This pick list can be entered using the shortcut code "chix".

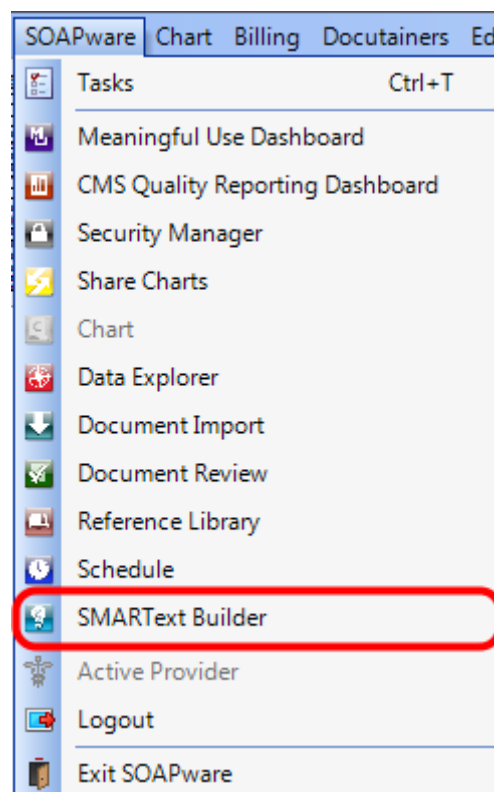
The pick list "chix" contains bundles. When a user clicks on the Chief Complaints pick list, they are presented with a list of body systems to choose from and a "Most Common Chief Complaints" item. The "Most common Chief Complaints" items is a SMARTText Bundle. When a bundle is selected, the SMARTText Quick Access displays all of the items that are inside the bundle (as seen with the "Most Common Chief Complaints Bundle" in the screenshot above).



Structure Editor

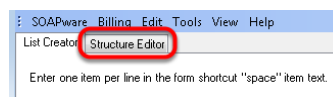
The Structure Editor is used to edit multiple SMARText items that are grouped within a single item. It is also used to group multiple SMARText items into a single item and then designate how they are displayed when inserted into documentation. The Structure Editor may also be used to view the structure or hierarchy among the grouped SMARText items.

Opening the Structured Editor



To open the Structured Editor, we will need to go into the SMARText Builder workspace.

Click on the SOAPware menu, then select SMARText Builder.



When the SMARText Builder is opened this will open to the List Creator by default.

To view the Structure Editor, Click on the Structure Editor tab.



Structure Editor Interface

..... Drag SMARText Item to edit here.

Hold down CTRL key while Dragging to insert item as a child.

Item Separators

☐ As Is ☐ English List (and) ☐ English List (or) ☐ Separate Lines

☐ Separate with ☐ End with

Save

Clear

Search List

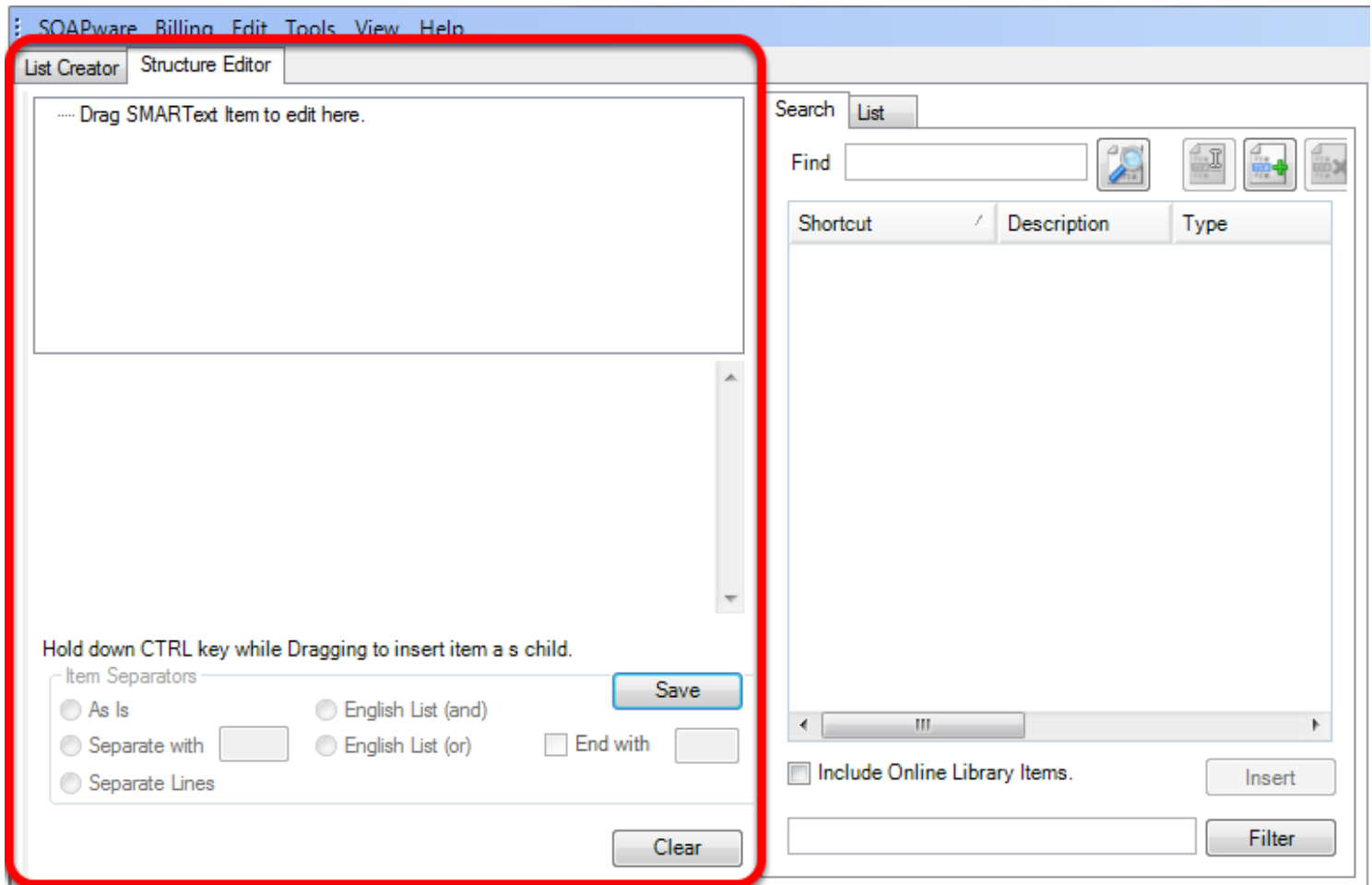
Find

Shortcut / Description Type

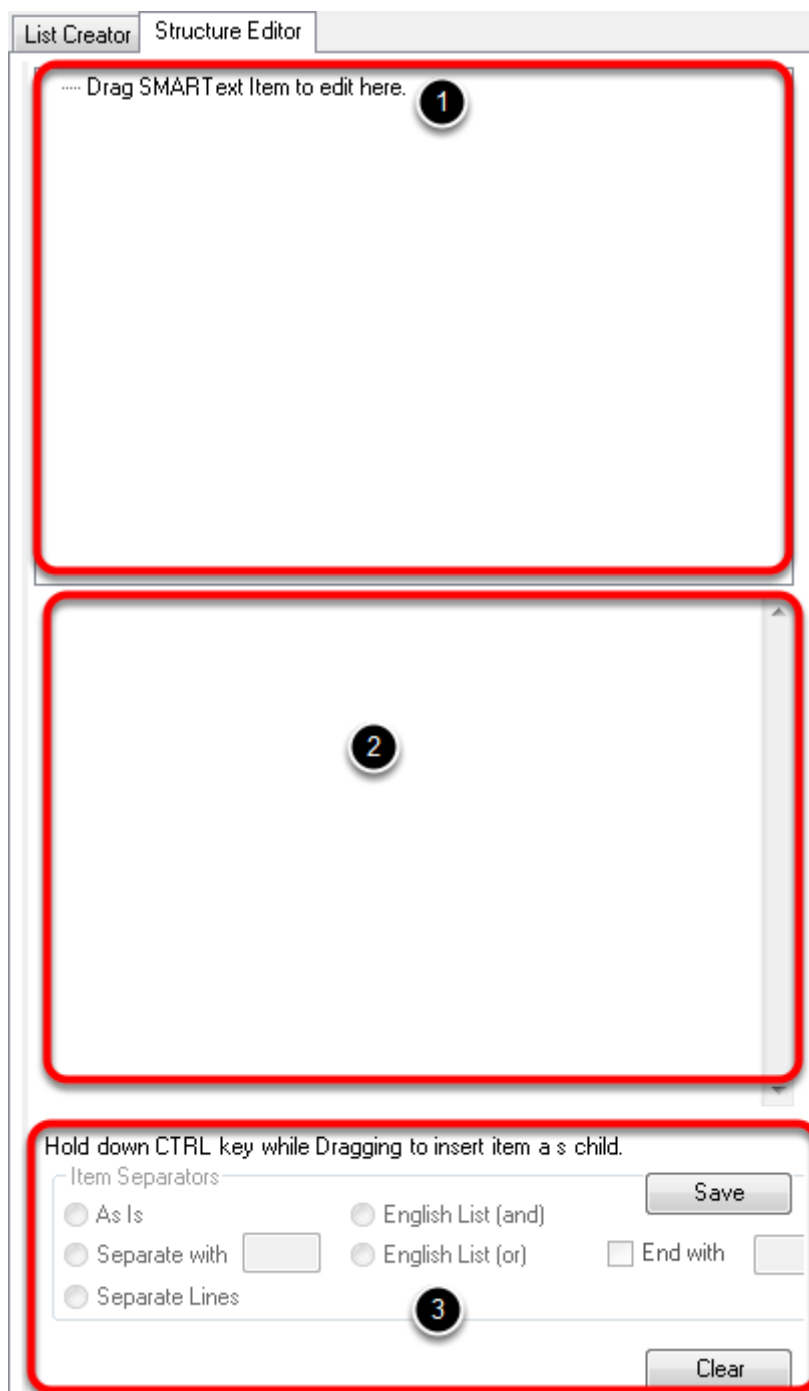
☐ Include Online Library Items. Insert

Filter

The right side of the Structure Editor contains the SMARText Items Manager. The SMARText Items Manager allows users to search for existing SMARText items and create new SMARText items.



The left side of the Structure Editor can be used to edit and create more complex SMARText items.



1. The top section that displays the text "Drag SMARText items to edit here" is used to add and re-order SMARText items.
2. The middle section is very similar to the Display Field within the SMARText Designer. Very little editing is actually performed here, but it does display the edits and changes performed



elsewhere.

3. The bottom properties section will allow the user to define the desired item separators and Clear or Save the SMARText items.

Editing a SMARText Item in Structred Editor

The screenshot shows the SMARText Editor interface. The left pane is the Structure Editor, which is currently empty and contains the text ".... Drag SMARText Item to edit here.". The right pane is the SMARText Items Manager, which displays a list of SMARText items. The "Find" box is highlighted with a red circle and the number 1, and the "Search" button is highlighted with a red circle and the number 2. The list of items is as follows:

Shortcut	Description	Type	Us
	* Reports sympt...	Toggle Multi-Sel...	11
HPix	* HPI* (Head...	HPI Item	7
QuaX	* QUALITY/CO...	Quality Course	2
ConX	* CONTEXT/W...	Context When	1
	(Next Complaint...	List Item Group	0
ComInfE	Replace - Delete...	Multi-Sel List	0
ComNex	-(COMPLAINT -...	Multi-Sel List	0
NexC	(NexC Next C...	Multi-Sel List	0
NexD	(Next Complaint...	Multi-Sel List	0
NexDs	(Next Complaint...	Multi-Sel List	0
NexS	(Next Complaint...	Multi-Sel List	0
NexSs	(Next Complaint...	Multi-Sel List	0
nextcomed	-(COMPLAINT -...	Multi-Sel List	0

Below the list, there is a checkbox for "Include Online Library Items." and an "Insert" button. At the bottom, there is a "Filter" button.

At the bottom of the Structure Editor, there is a section for "Item Separators" with the following options:

- ☐ As Is
- ☐ English List (and)
- ☐ Separate with
- ☐ English List (or)
- ☐ End with
- ☐ Separate Lines

There are "Save" and "Clear" buttons at the bottom of the Structure Editor.

In the SMARText Items Manager that displays on the right side of the Structure Editor, search for the SMARText Item that will be edited.

1. Type a keyword for the SMARText Item into the Find box
2. Click the Search button



Editing an Item

..... Drag SMARText Item to edit here.

Drag and Drop the SMARText Item

Search List

Find hpix

Shortcut	Description	Type	Us
HPIx	* HPI* (Head...	HPI Item	7
QuaX	QUALITY/CO...	Quality Course	2
ConX	* CONTEXT/W...	Context When	1
	(Next Complaint...	List Item Group	0
ComInfE	Replace - Delete...	Multi-Sel List	0
ComNex	-(COMPLAINT -...	Multi-Sel List	0
NexC	(NexC Next C...	Multi-Sel List	0
NexD	(Next Complaint...	Multi-Sel List	0
NexDs	(Next Complaint...	Multi-Sel List	0
NexS	(Next Complaint...	Multi-Sel List	0
NexSs	(Next Complaint...	Multi-Sel List	0
nextcomed	-(COMPLAINT -...	Multi-Sel List	0

Hold down CTRL key while Dragging to insert item a s child.

Item Separators

☐ As Is ☐ English List (and) ☐ English List (or) ☐ End with

☐ Separate with ☐ Separate Lines

Save Clear

☐ Include Online Library Items. Insert

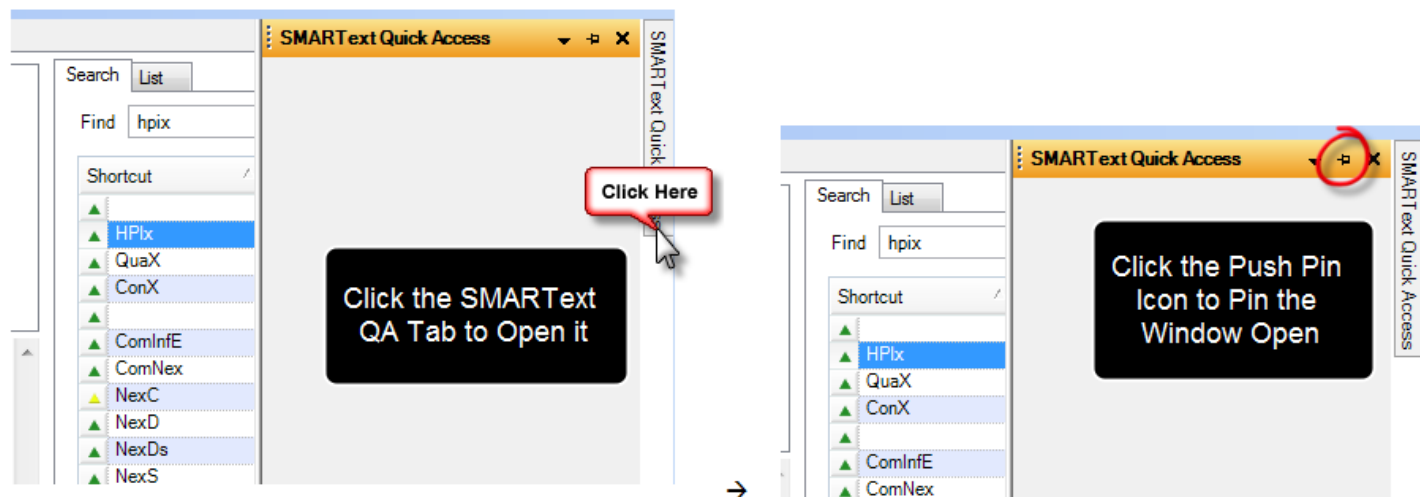
Filter

Next, the item should be dragged and dropped into the Structure Editor.

1. Select the item that will be edited
2. Drag and drop item into the Structure Editor's top display section



Displaying the SMARText Sub-Items



The SMARText item has now been placed in the Structure Editor.

Next, we will look at displaying any existing sub-items or adding new sub-items to selected SMARText Item. To do this, the user will need to pin open the SMARText Quick Access dialog.



The screenshot shows the SOAPware interface with three main windows. In the 'List Creator' window, a tree structure is shown with 'HPIx' as a header and 'ONSET/TIMING' and 'QUALITY/COURSE' as sub-items. A red box labeled '4' highlights this tree. In the 'Structure Editor' window, a text field contains 'HPI: [ONSET/TIMING: QUALITY/COURSE:]' with a red box labeled '2' around it. Below this, a red box labeled '1' highlights the 'Item Separators' section, which has 'Separate Lines' selected. In the 'SMARText Quick Access' window, a table lists various items. A red box labeled '3' highlights the 'Selected' column, where checkboxes for 'QUALITY/COURSE: ', 'ONSET/TIMING: ', and 'CONTEXT/WHEN: ' are checked. The table has columns: Selected, Description, Shortcut, T, and Us.

Selected	Description	Shortcut	T	Us
<input type="checkbox"/>	SYMPTOMS/RELATE...	SymX	S	0
<input checked="" type="checkbox"/>	QUALITY/COURSE: "	QuaX	Q	0
<input checked="" type="checkbox"/>	ONSET/TIMING: "	OnsX	O	0
<input type="checkbox"/>	CONTEXT/WHEN: "	ConX	C	0
<input type="checkbox"/>	MODIFIERS/TREATM...	Modx	M	-1
<input type="checkbox"/>	INTENSITY/SEVERIT...	IntX	In	-2
<input type="checkbox"/>	LOCATION: "	LocX	L	-3
<input type="checkbox"/>	DURATION: "	DurX	D	-3

To automatically display the SMARText Items sub-items when inserted into documentation, the following steps will need to be taken:

1. Select the desired Item Separators (the most common setting will be "Separate Lines")
2. Click on the SMARText Item's header (in our example above, we will Click on "HPI:")
3. In the SMARText Quick Access window, place a check mark next to each sub-item that should be automatically displayed when the initial SMARText item is inserted into the documentation.
4. As sub-items are checked in the SMARText Quick Access window, they will be displayed next to the initial item header (in our example above, we checked ONSET/TIMING and QUALITY/COURSE, these are now displayed next to our HPI header in both the top and



middle sections of the SMARText Editor.)

Next time the "HPIx" SMARText item is inserted into the documentation, it will automatically display the sub-items "ONSET/TIMING" and "QUALITY/COURSE".

Adding New Sub-Items

The screenshot shows the SMARText Editor interface. The 'List Creator' tab is active, displaying a list of items. A red circle highlights the 'HPI: (HPI Item)' item, and a red arrow points to it from the 'HPI: (HPI Item)' item in the 'Structure Editor' tab. The 'Structure Editor' tab shows a list of items with columns: Shortcut, Description, Type, and Us. The first item is 'wcodev' with description '2m Developmen...' and type 'Gen Assoc Const'. A red circle highlights the first item in the list. The 'List Creator' tab shows a search bar with 'wcodev' entered. The 'Structure Editor' shows a list of items with columns: Shortcut, Description, Type, and Us. The first item is 'wcodev' with description '2m Developmen...' and type 'Gen Assoc Const'. A red circle highlights the first item in the list.

Shortcut	Description	Type	Us
wcodev	2m Developmen...	Gen Assoc Const	0
wcodev	4m Developmen...	Gen Assoc Const	0
wcodev	6m Developmen...	Gen Assoc Const	0
wcodev	9m Developmen...	Gen Assoc Const	0

Sub-Items can also be added to the list by using the Structure Editor. To add new sub-items to the list:

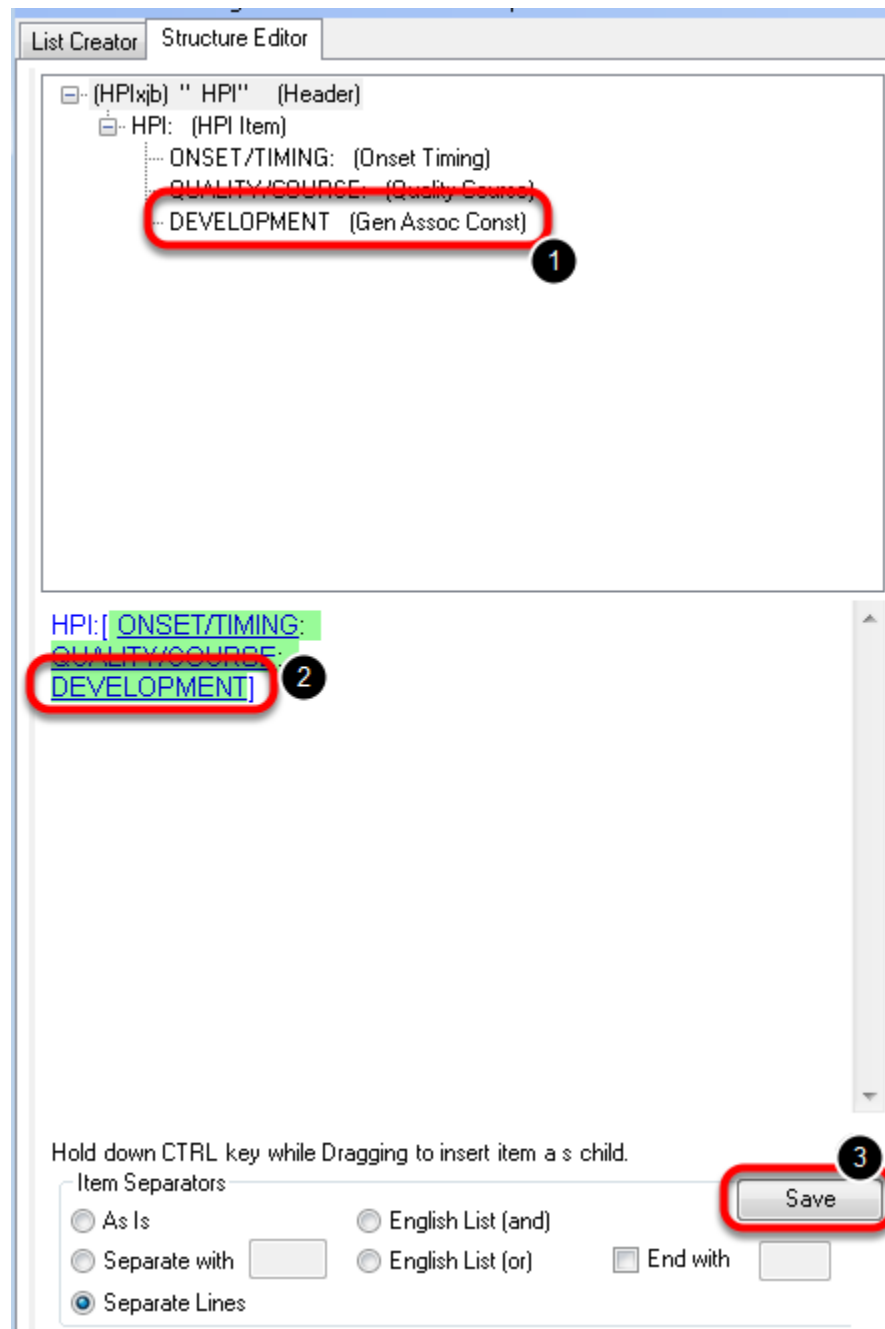
1. In the SMARText Items Manager on the right side of the Structure Editor, search for the sub-item that will be added.
2. Press the Control key on the keyboard and then select the item (the Ctrl key must be pressed before highlighting the item)
3. While holding down the Control Key, drag and drop the item directly on top of the original



SMARText Items' header within the top section of Structured Editor (see example in the screenshot above). In our example above, we will drag and drop the "wccdev" item directly on top of the HPI: (HPI Item) header.

Creating New SMARText Items to Add as Sub-Items:

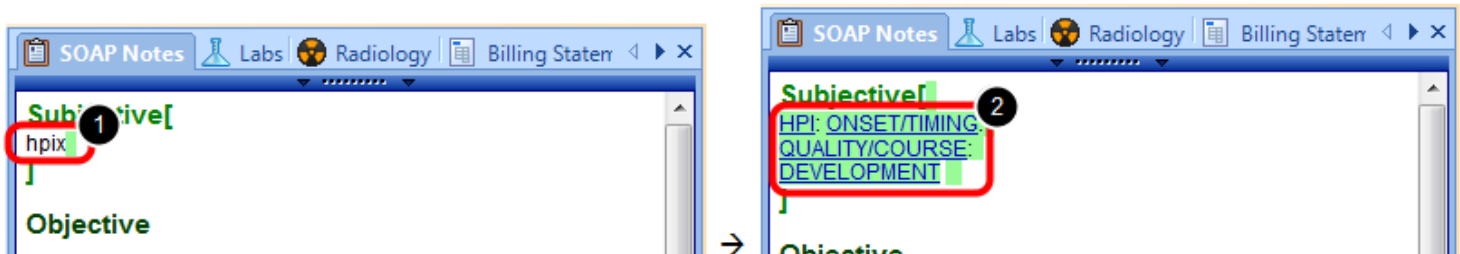
New SMARText items must be created in the SMARText Items Manager. For information on how to create a new SMARText Item, please see: [Creating SMARText Items](#). After new items are created in the SMARText Items Manager they may be added to the list by using the steps described above.



1. The new sub-item has now be added to the original SMARText Item. In our example above, the DEVELOPMENT SMARText item has been added as a "child" or "sub-item" to the original HPI SMARText Item.
2. The new sub-item will display in both the top action section and the middle display section.
3. To save the changes click on the Save Button.



Inserting the Edited SMARText List



When the SMARText Item is inserted into the documentation using the (1) shortcut code (in our example "hpix"), it will now expand to automatically include the specified (2) sub-items (in our example, ONSET/TIMING, QUALITY/COURSE, AND DEVELOPMENT).

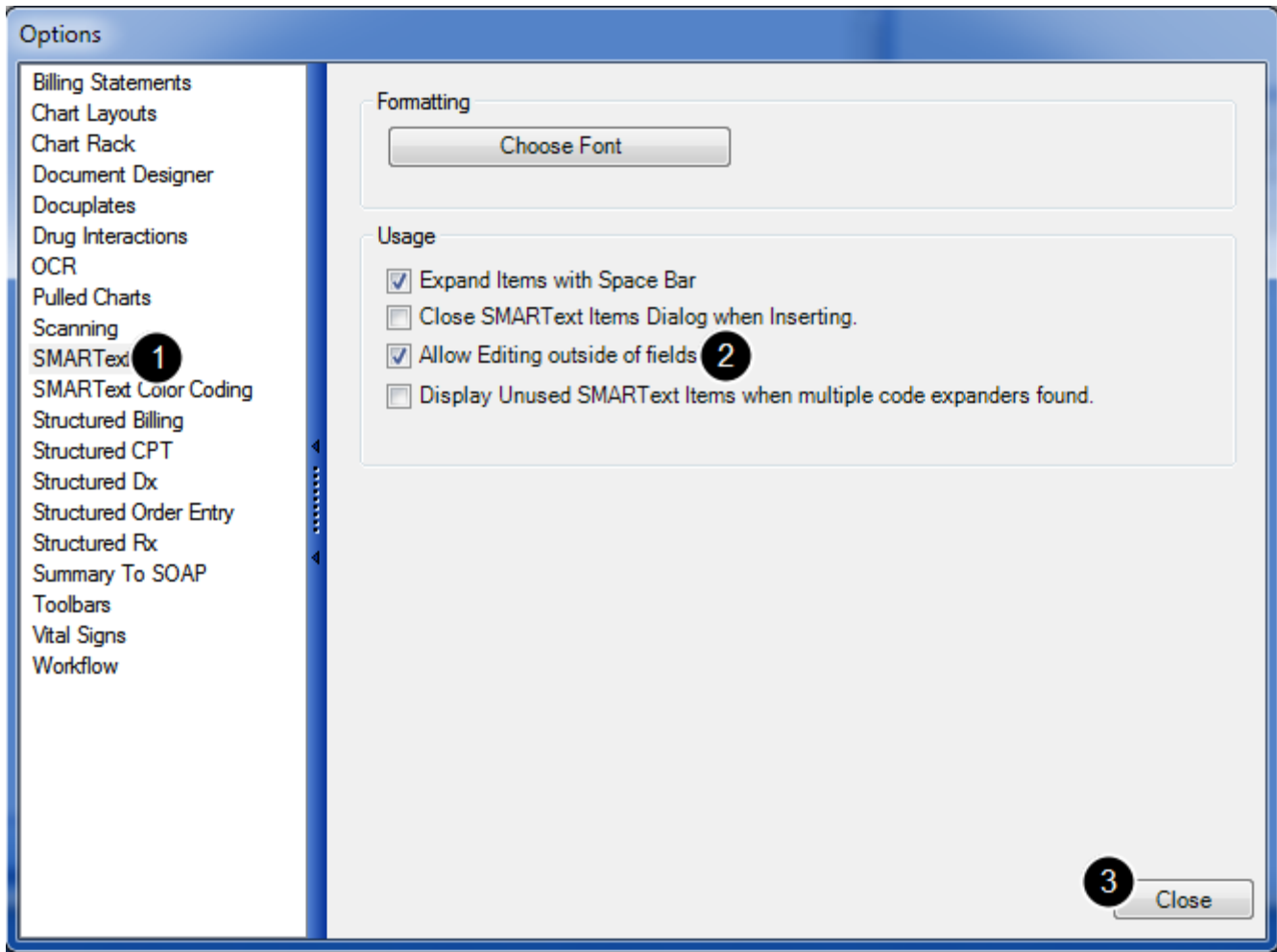


Customizing Field Headers



Create Custom Field Headers

Enable Editing of SMARText Outside of the Fields



Click Tools in the menu bar, and Click the Options menu item.

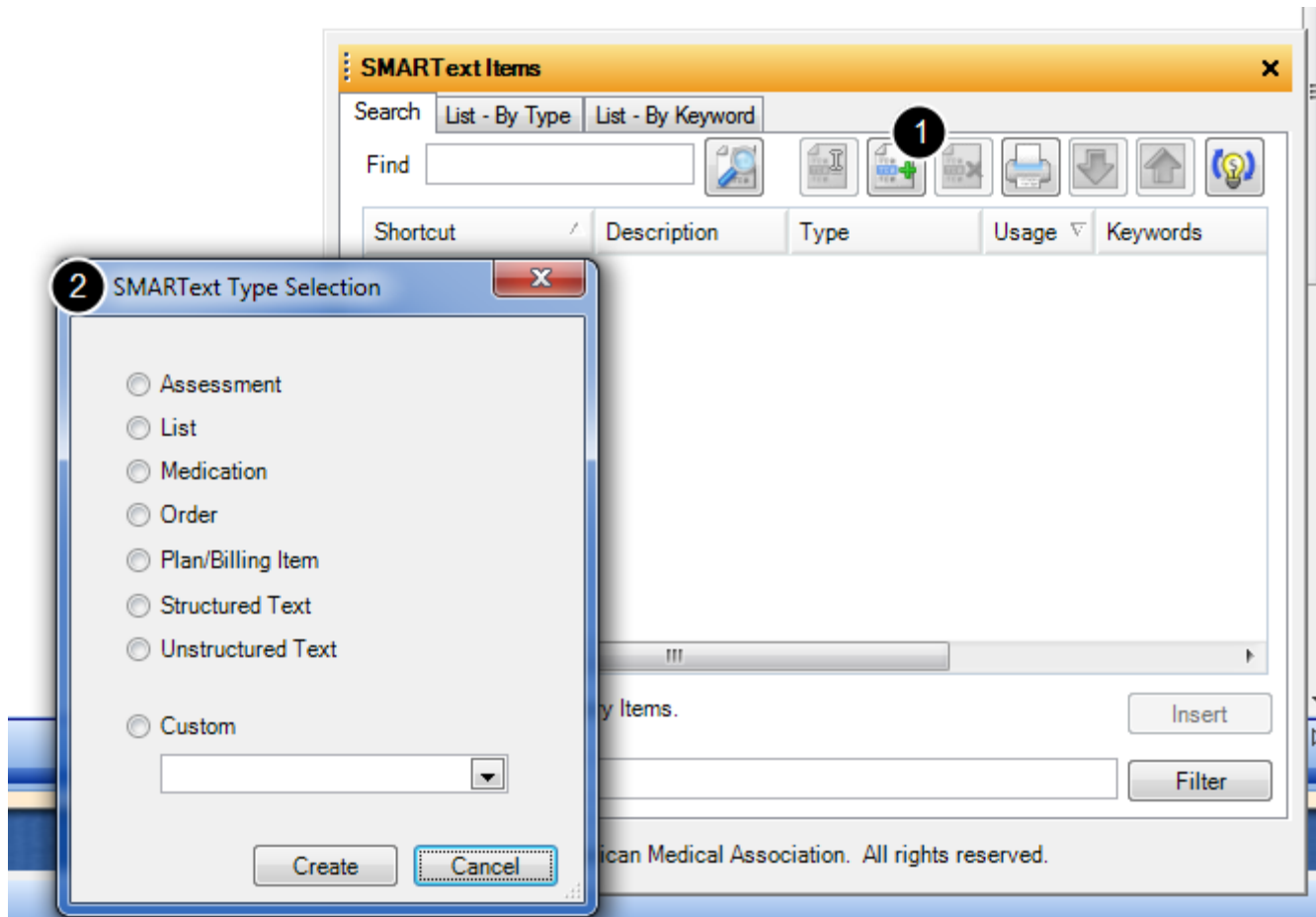
1. Click the SMARText list item
2. Click the Allow Editing outside of fields check box
3. Click Close.

Then, log out of SOAPware and log back in.

NOTE: Changes will not take place until the user has completed the log out/log in process.



Create the New Field Item

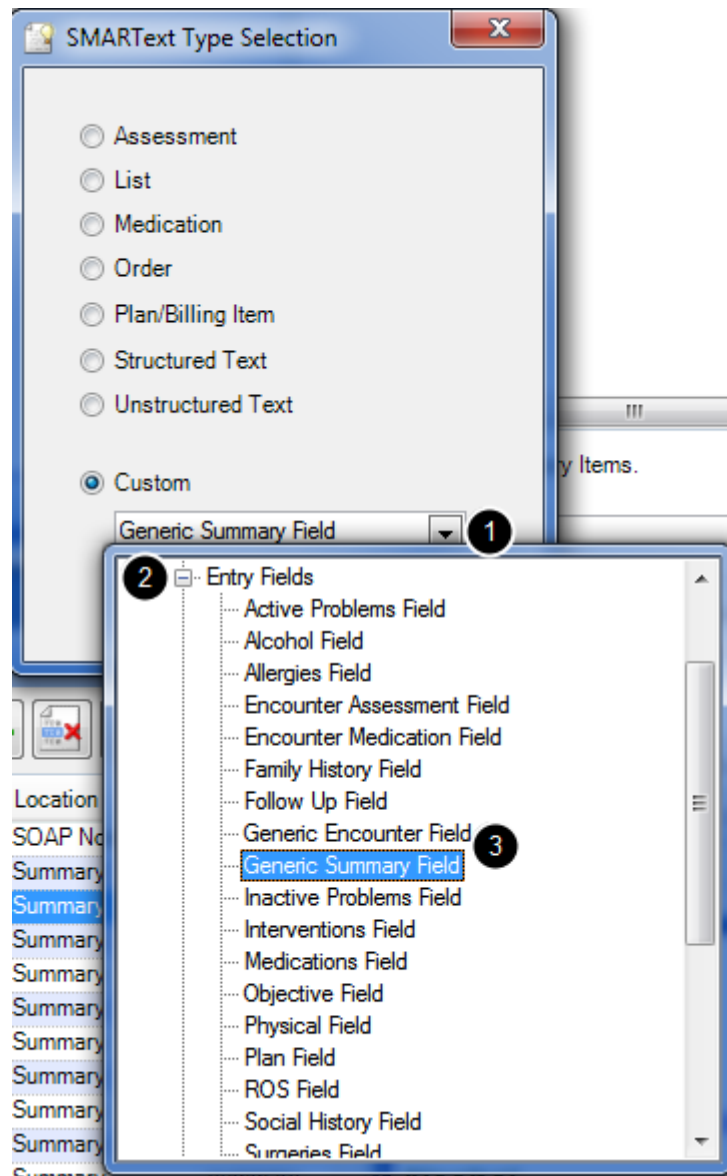


Click Docutainers in the menu bar, and Click the SMARTText Items menu item

1. When the SMARTText Items dialog opens, Click the Create button.
2. This will bring up the SMARTText Type Selection window.



Select the Item Type



1. Click the Item Type drop-down menu near the bottom of the SMARText Type Selection dialog.
2. Click the Entry Fields plus-box.
3. Double-click the appropriate type of field name (i.e. Generic Summary Field or Generic Encounter Field).

Click Create.



SMARText Designer

The screenshot shows the SMARText Designer window with the following configuration:

- Shortcut:** dismeds
- Description:** Discontinued Medications Field
- Keywords:** discontinued, meds, field
- Display Header:** ☒ Display Header, Discontinued Medications, ☐ only when item is empty.
- Advanced:**
 - General:**
 - Item Type:** Generic Summary Field
 - Item Properties:**
 - Item Settings:** (Empty text area)
 - Item Separators:**
 - ☒ As Is
 - ☐ Separate with []
 - ☐ Separate Lines
 - ☐ English List (and)
 - ☐ English List (or)
 - ☐ End with []

At the bottom right, there are **Save** and **Cancel** buttons.

1. At the top of the SMARText Designer window, Type a Shortcut, Description and Keywords.
2. Type the Name of the Field Header in the Display Header box.
3. Click the Display Header check box. Click Save.



Insert the New Field

Medications

[
dismeds

]Allergies

[Starter - Allergies - Summary:](#)

1. Open the docuplate to change.
2. The user should Click at the location where he/she wants to insert the new field name/header. A set of small green brackets will appear, indicating that the user is working outside of the fields within the docuplate. Hit enter three or four times to create some space for the new field.
3. Type the Shortcut for the new field.

Insert the Field Header

Medications

Discontinued Medications

[]

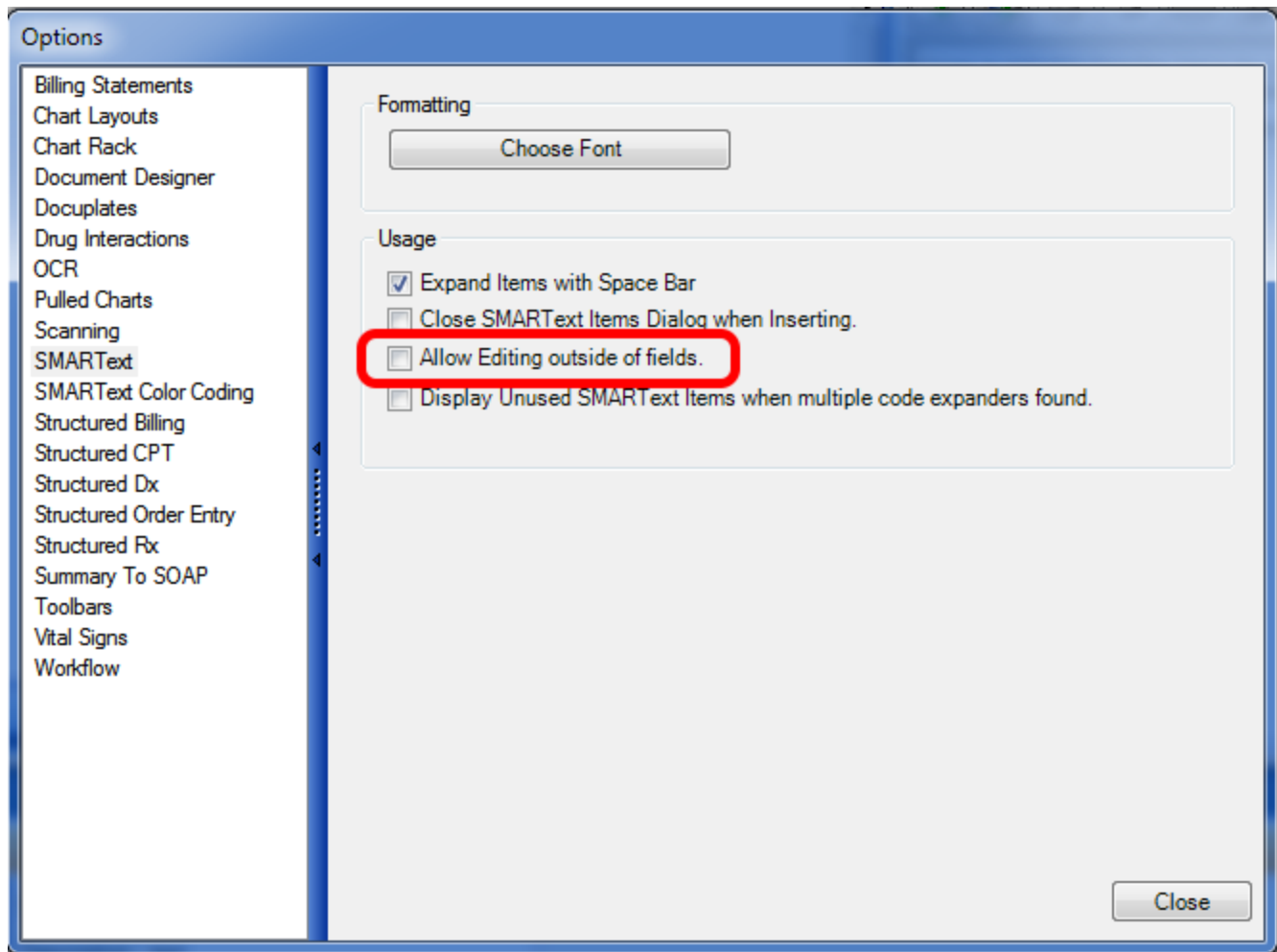
]Allergies

[Starter - Allergies - Summary:](#)

Then press the space bar, and the field/header is inserted.



Disable Editing Outside of Fields



Click Tools in the menu bar > Click the Options menu item > Click the SMARTText Items menu item > Click the Allow Editing outside of fields check box to toggle it back to unchecked > Click Close, and Log out/Log in.



Remove or Hide Field Headers

It is possible to hide field/headers in the SOAP or Summary chart sections (i.e. such as hiding the Subjective field in SOAP encounter notes)

Manage Sub-Items

The screenshot shows the 'Docuplates' window with a list of docuplates on the left and a details panel on the right. The 'summary' docuplate is selected. A right-click context menu is open over the 'summary' docuplate, with a red arrow pointing to the 'Manage Sub Items' option at the bottom. A black callout box with white text says 'Right-click at the very bottom of the docuplate window' with an arrow pointing to the right-click location.

Shortcut	Description	Location	Keywords
SoapPL	Summary - with...	SOAP Notes	list, pick, SC
summary	Empty Summary	Summary	
Summary-DPL	Summary Defaul...	Summary	090603, Def
SumPL	Summary - with...	Summary	lists, pick, S
SumPL	Summary - with...	Summary	lists, pick, S
DrugFailSum	Summary Pick-L...	Summary	Allergy, Drug
evertsonsum	Geriatric summa...	Summary	01.0.A00.GE
summaryOURS	Custom Summar...	Summary	summary he
	Summary 2/16/2...	Summary	famdoc, sum
summary	DR.J #1	Summary	FEMALE
summary	summary - 9/09	Summary	summary
arp summary	arp summary	Summary	arp, summar
*summaryEAB2	*SUMMARY DE...	Summary	default, eab,
summary2	summary	Summary	summary
tfmpedsum	Pediatric summa...	Summary	01.0.A00.GE
Summary-DPL	Summary Defaul...	Summary	090603, Def
famdocsum	Default Summar...	Summary	
*summaryEAB	*SUMMARY DE...	Summary	
SumPL	Summary - with...	Summary	
jbsummary	Summary	Summary	
summaryEAB	Summary Defaul...	Summary	
summary	Empty Summary	Summary	
summary	summary - 9/09	Summary	CFP, summa

Right-click at the very bottom of the docuplate window

Manage Sub Items

Press F6 to open the Docuplate manager, and Click the docuplate to modify (i.e. usually the choice is the default docuplate for that chart section).

With the docuplate to be edited in view, Right-click just underneath the last field in the docuplate (see screen-shot below). Positioning the cursor can be a little tricky because the right-click has to be in a location just after the last close bracket.



In the right-click menu, Click Manage Sub Items as seen below. (If the user sees a different menu when he/she right-clicks, move the mouse down just a little bit and try again.)

Hide the Header

The screenshot displays the SOAPware interface. On the left, a window titled 'Summary-DPL' contains the following fields:

- Shortcut: Summary-DPL
- Description: Summary Default Pick List - 090603
- Keywords: 090603, Summary-DPL, List, Pick, Def
- Section: Summary

Below these fields is a list of items with their corresponding pick lists:

- UNCLES/AUNTS:**
OTHERS/DISTANT:
- Tobacco**
[Pick List - Tobacco - Summary](#)
- Alcohol**
[Starter - Alcohol - Summary](#)
- Interventions**
- Social History**
[Starter Pick List - Social History](#)
- ROS**
- Physical**

At the bottom of the window is a 'Summary' button. On the right, the 'SMARText Quick Access' sidebar is visible, showing a list of items with checkboxes:

Select	Description
<input checked="" type="checkbox"/>	Active Problems
<input checked="" type="checkbox"/>	Inactive Problems
<input checked="" type="checkbox"/>	Surgeries
<input checked="" type="checkbox"/>	Medications
<input checked="" type="checkbox"/>	Allergies
<input checked="" type="checkbox"/>	Family History
<input checked="" type="checkbox"/>	Tobacco
<input checked="" type="checkbox"/>	Alcohol
<input checked="" type="checkbox"/>	Interventions
<input checked="" type="checkbox"/>	Social History
<input checked="" type="checkbox"/>	ROS
<input checked="" type="checkbox"/>	Physical

In the SMARText Quick Access, all the fields in the docuplate should be displayed. To hide one, Click its Check-box to UN-check it. This doesn't actually remove the field, but has the same functional purpose.

NOTE: To reactivate the hidden field, simply re-check the field's check-box.



The Result

The screenshot displays the SOAPware interface. On the left, a window titled 'Summary' contains the following fields:

- Shortcut: Summary-DPL
- Description: Summary Default Pick List - 090603
- Keywords: 090603, Summary-DPL, List, Pick, Def
- Section: Summary

Below these fields, the main content area shows a list of items with their descriptions and links:

- UNCLES/AUNTS:**
OTHERS/DISTANT:
- Tobacco**
[Pick List - Tobacco - Summary](#)
- Alcohol**
[Starter - Alcohol - Summary](#)
- Interventions**
- Social History**
[Starter Pick List - Social History](#)

At the bottom of the window, there is a 'Summary' button.

On the right, the 'SMARText Quick Access' panel is visible. It contains a table with the following items:

Select	Description
<input checked="" type="checkbox"/>	Active Problems
<input checked="" type="checkbox"/>	Inactive Problems
<input checked="" type="checkbox"/>	Surgeries
<input checked="" type="checkbox"/>	Medications
<input checked="" type="checkbox"/>	Allergies
<input checked="" type="checkbox"/>	Family History
<input checked="" type="checkbox"/>	Tobacco
<input checked="" type="checkbox"/>	Alcohol
<input checked="" type="checkbox"/>	Interventions
<input checked="" type="checkbox"/>	Social History
<input type="checkbox"/>	ROS
<input type="checkbox"/>	Physical

With ROS and Physical Un-Checked, they are no longer visible in the docuplate.



Flow Sheets



Create an HL7 Lab Flow Sheet

Labs that are received via an HL7 interface may be inserted into a flow sheet. Once created, the flow sheet will automatically populate past and future results for a specific test. Lab test results may then be graphed and compared.

Open Chart Sections

The screenshot shows the SOAPware interface with the 'Flow Sheets' and 'Labs' sections visible. The 'Flow Sheets' tab is highlighted with a red circle and an arrow. The 'Labs' icon is also highlighted with a red circle and an arrow. A red circle with the number '1' points to the 'Flow Sheets' tab, and a red circle with the number '2' points to the 'Labs' icon. The 'Labs' section displays patient information and a list of lab tests.

Patient Information:

- REPORT GENERATED: 02/02/2012 9:23 AM
- Patient Name: LAB TEST
- Birthdate: 04/12/1976 12:00 AM
- Social Security:
- Accession Number: 06642502590
- Order Status: F
- Collection Date: 03/07/2011 7:08 AM
- Date Reported: 03/08/2011 10:07 AM
- Fasting Status: Y

Lab Test Results:

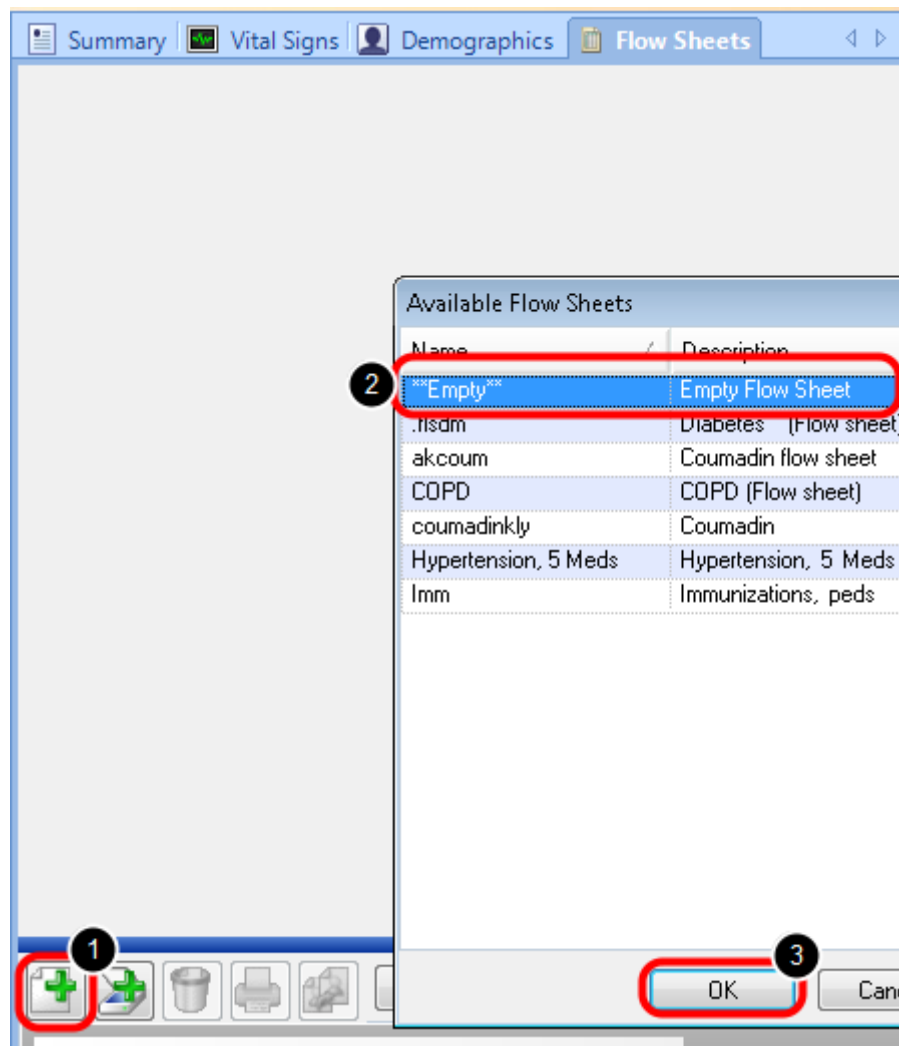
Date	Name	Owner	Status
3/7/2011 7:08:00 AM	CBC/Diff Ambiguous Default		
1/10/2003 3:22:00 PM	CBC		

To create an HL7 Flow sheet, the Lab and Flow Sheet chart sections must be visible in the chart workspace.



1. Open the Lab chart section and the Flow Sheet chart section.
2. Select an HL7 Lab document by double-clicking on the document.

Open an Existing Flow Sheet - Create a New Flow Sheet



Open an existing flow sheet, or create a new Flow Sheet by following these instructions:

1. Within the Flow Sheets chart section, Click on the **Green +** to create a new Flow Sheet.
2. Select "**Empty Flow Sheet**" from the Available Flow Sheets list.
3. Click **OK**.



Transfer the Lab Result

The screenshot shows the SOAPware interface with the 'Labs' section selected. The 'CBC/Diff Ambiguous Default' test is displayed. The 'RBC' result is highlighted with a red circle and labeled '1'. A red arrow points from this result to the 'Graph' area in the 'Flow Sheets' section, which is labeled '2'. The 'Graph' area is currently empty.

Name	Flags	Value	Range
CBC/Diff Ambiguous Default			
Status: F			
WBC		5.4	(4.0 - 10.5)
RBC		4.12	(3.80 - 5.10)
Hemoglobin		12.1	(11.5 - 15.0)
Hematocrit		37.0	(34.0 - 44.0)
MCV		90	(80 - 98)
MCH		29.4	(27.0 - 34.0)
MCHC		32.7	(32.0 - 36.0)
RDW		14.0	(11.7 - 15.0)

1. Select the lab result to be transferred to the flow sheet.
2. Drag and drop the result from the HL7 document into the empty flow sheet (remember to left-click the mouse--and not to release the left-click until the symbol changes from a circle with a line in the center, to the arrow shown above in the screenshot).

Finished Product

The screenshot shows the 'Flow Sheets' section with the 'RBC' result added to the flow sheet. The 'Graph' area is now populated with the value 4.12.

The lab result has now been added to the new flow sheet.

All past and future results for this lab test, from this specific facility, will be transferred to the flow



sheet. If labs are received via an HL7 interface from multiple facilities, only the results from the facility listed on the original HL7 result will be transferred. This same process will need to be repeated for results received from other facilities.



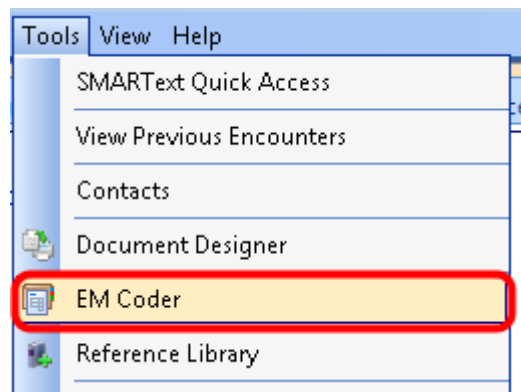
EM Coder



Introduction to EM Coder

The EM Coder is a tool used by providers to determine a level of service for an office visit. The EM Coder, exam scoring is based solely on the General Multi-Systems Exam. Single system exams are not calculated with the EM coder.

Open the EM Coder



The EM Coder can be opened by going to Tools > EM Coder, while in the Chart workspace.



Interface

EM Coder [X]

Exam Type: General, Multi-Systems

EM Scoring | Methodology | Exam Types

⚠ Please enter a Chief Complaint

Current Points	Points For Next Level
HPI: 0	HPI: 0
ROS: 0	ROS: 0
PFSH: 1	PFSH: 0
Total History: 1	Total History: 0
Exam: 1	Exam: 0
Decision: 0	Decision: 0

Level of Risk: 0 - Not Selected [v] ☐ New Patient

Calculate

As the Provider documents throughout the SOAPnote and Summary chart sections using SMARText documentation the EM coder will suggest a level of service.



Documentation

The screenshot displays the SOAPware clinical interface with two main panels. The left panel, titled 'Summary', contains sections for 'Active Problems' (Well child care - 18 month, Healthy), 'Inactive Problems' (Respiratory symptoms/complaints), 'Surgeries' (Appendectomy), 'Medications' (Multi-Vitamins with Minerals), 'Allergies' (CODEINE), 'Family History' (Anemia, Diabetes, Migraine, Epilepsy, Asthma, Coronary artery disease, Cancer of Colon, Obesity, Mental Illness), 'Tobacco' (Never smoker), 'Alcohol' (No alcohol consumed), 'Interventions', 'Social History' (Single, Lives in condo, Drives, Employed, Strong social support network), and 'ROS'. The right panel, titled 'SOAP Notes', contains sections for 'Subjective' (COMPLAINT or ISSUE, HPI, QUALITY/COURSE, INTENSITY/SEVERITY, ONSET/TIMING, MODIFIERS/TREATMENTS, ROS, HENT, EYES, LUNGS/Respiratory) and 'Objective' (Exam: GENERAL, LYMPHATIC, Axillary node exam, HEAD, EARS, NOSE AND THROAT, Otoscopic Exam, Hearing assessment, Nose exam, Teeth, Gingiva, and Lip Exams, Oropharynx, NECK, Thyroid exam, LUNGS and RESPIRATORY, Respiratory effort, HEART (Cardiovascular), Edema-Varicosity Exam).

In order for the EM Coder to calculate, specific SMARText items must be used in the Summary and SOAPnote chart sections. Free text items and free text docuplates cannot be calculated by the EM coder.

Docuplates created using the following SMARText starter pick lists will calculate with the EM Coder:

- Sub-
- Chix
- Hipx



- Rosx
- Obj-
- Pla-

Calculation

EM Coder [X]

Exam Type: General, Multi-Systems

EM Scoring | Methodology | Exam Types

Probable Level of Service - **Level 4**

Current Points	Points For Next Level
HPI: 7	HPI: 2
ROS: 4	ROS: 6
PFSH: 3	PFSH: 0
Total History: 14	Total History: 8
Exam: 20	Exam: 0
Decision: 2	Decision: 1

Level of Risk: 1 - Minimal [v] ☐ New Patient

Calculate

The EM Coder will display the calculation for the active encounter on the EM Scoring tab.



EM Coder: History

The Evaluation and Management Code allows users to automatically determine the level of service for encounter note documentation. The E&M Coder continually reports the complexity of history, exam, and decision-making, simplifying the process of determining the adequacy of documentation. This lesson will explain how this is calculated for the history in SOAPware.

EM Coder

Exam Type: General, Multi-Systems

EM ScoringMethodologyExam Types

Probable Level of Service - N/A

Current Points

Points For Next Level

HPI: 0

ROS: 0

PFSH: 0

Total History: 0

Exam: 0

Decision: 0

HPI: 0

ROS: 0

PFSH: 0

Total History: 0

Exam: 0

Decision: 0

Level of Risk: 0 - Not SelectedNew Patient

Calculate

EM Coder

Exam EM Coderral, Multi-Systems

EM ScoringMethodologyExam Types

HISTORY:

HPI Points - 0

ROS Points - 0

PFSH Points - 3

*Total History Score - 3

EXAM:

GEN - 1

VS - 0

LYMPH - 0

HEENT - 0

EYES - 0

NECK - 0

LUNGS - 0

CHEST/BREASTS - 0

HEART - 0

ABD - 0

GENT - 0

BJE - 0

NEURO - 0

PSYCH - 0

SKIN - 0

Categories Addressed - 1

*Total Exam Score - 1

DECISION MAKING

Calculate

We advise that levels of service be primarily determined by the nature of the visit and not how much documentation can be created. For example, if a patient comes in with a simple rash and no other problems or issues, then that is most likely going to be a level 3 visit, even though it is very easy to have documentation to support a higher level. Let the reason/nature of the visit determine the level you submit.



Chief Complaint

The screenshot shows the 'EM Coder' window with the 'Exam Type' set to 'General, Multi-Systems'. The 'EM Scoring' tab is selected. A red circle highlights a yellow warning icon and the text 'Please enter a Chief Complaint.' Below this, there are input fields for 'Current Points' and 'Points For Next'.

In order to justify a level of service for any/all levels of service, there must always be a chief complaint and at least one diagnosis. Until there is a Chief Complaint, a warning will be displayed at the top of the EM Coder.

Diagnosis

The screenshot shows the 'EM Coder' window with the 'Exam Type' set to 'General, Multi-Systems'. The 'EM Scoring' tab is selected. A red circle highlights a yellow warning icon and the text 'Please enter a Diagnoses.' Below this, there are input fields for 'Current Points' and 'Points For Next'.

Subsequently, if a diagnosis hasn't been entered, another warning is displayed.



EM Scoring

EM Coder [X]

Exam Type: General, Multi-Systems

EM Scoring | Methodology | Exam Types

Probable Level of Service - **Level 4**

Current Points	Points For Next Level
HPI: 8	HPI: 1
ROS: 4	ROS: 6
PFSH: 3	PFSH: 0
Total History: 15	Total History: 7
Exam: 15	Exam: 3
Decision: 2	Decision: 1

Level of Risk: 1 - Minimal [v] ☐ New Patient

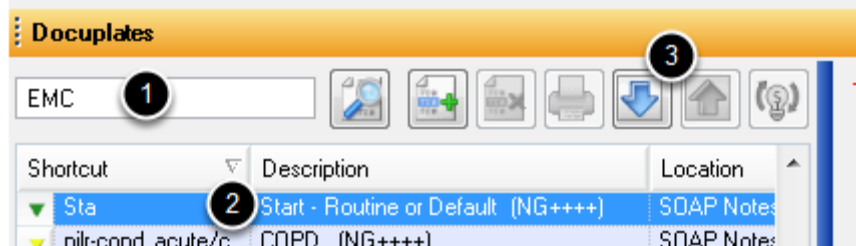
Calculate

Only after there is both a Chief Complaint and at least one diagnosis will E&M Coder begin to suggest levels of service.

Specific SMARText items and docuplate structure must be incorporated into documentation, in order to get assistance in determining level of service.



EM Coder Compatible Docuplates



EM coder compatible docuplates may be found in the Docuplates Menu (F6).

To Search for a EM coder compatible docuplate:

1. Type "EMC" into the search text box, then Click on the search icon
2. Select one of the EMC docuplates
3. Click on the blue download icon to download the docuplate to the local database



Docuplates

EMC

Shortcut	Description	Location
URICustomA	URICustomA - URI encounter form d...	SOAP Notes
Sta2	Start #2 (NG+++)	SOAP Notes
Sta	Start - Routine or Default (NG+++)	SOAP Notes
PhaNG	Pharyngitis or Sore Throat (NG+++)	SOAP Notes
PhaC	Pharyngitis or Sore Throat (Compres...	SOAP Notes
InfNG	Influenza (NG+++)	SOAP Notes
InfC	Influenza (Compressed) (NG+++)	SOAP Notes
GasNG	Gastroenteritis (NG+++)	SOAP Notes
GasC	Gastroenteritis (Compressed) (NG+...	SOAP Notes
EMCs	Starter (E&M Coding) (NG+++)	SOAP Notes
EMCo	EM Coding Outline 2-15-08	SOAP Notes
EMCcopd	COPD (NG+++)	SOAP Notes
GasC	Gastroenteritis (Compressed) (NG+...	SOAP Notes
emconisson	Health screening Nisson	SOAP Notes
EMCs	Starter (E&M Coding) 02-25-2009	SOAP Notes
emcoxrayonly	Xray Only template	SOAP Notes
InfNG	Influenza (NG+++)	SOAP Notes
lumcrw	Start - Routine or Default (NG+++)	SOAP Notes
emcov	emcov	SOAP Notes
EMCo	EM Coding Outline 2-15-08	SOAP Notes
flu	Flu or Influenza Template (NG+++)	SOAP Notes

☒ Include Online Library Items

Insert

Shortcut: EMCo
Description: EM Coding Outline 2-15-08
Keywords: 080215, Outline, Coding, EMCo
Section: SOAP Notes

Subjective
CHIEF COMPLAINT:
HPI: SYMPTOMS/RELATED:
LOCATION:
QUALITY/COURSE:
INTENSITY/SEVERITY:
DURATION:
ONSET/TIMING:
CONTEXT/WHEN:
MODIFIERS/TREATMENTS:

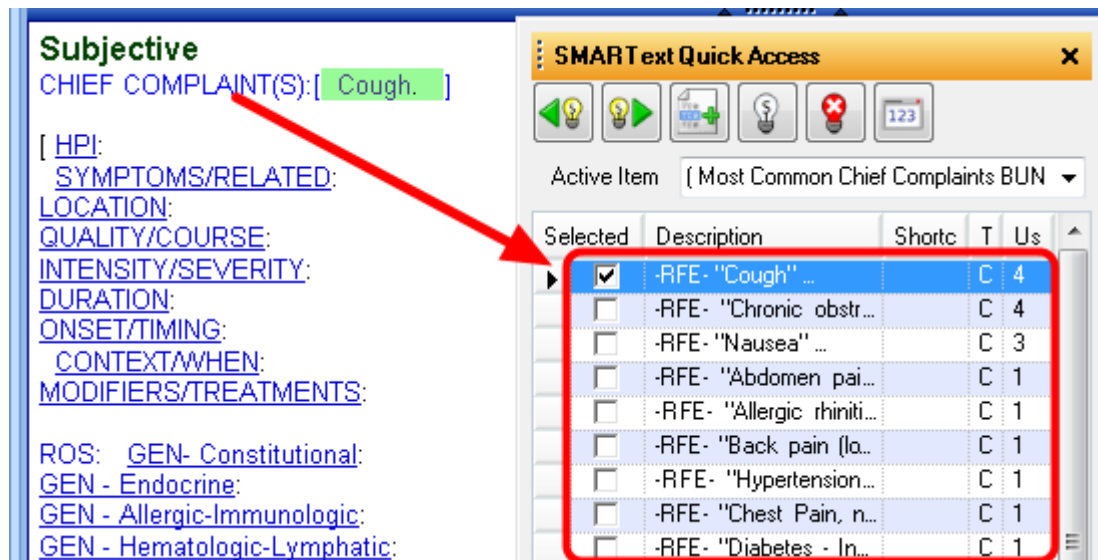
ROS: [GEN- Constitutional:
GEN - Endocrine:
GEN - Hematologic-Lymphatic:
GEN - Allergic-Immunologic:
HENT:
EYES:
LUNGS/Respiratory: |
HEART/Cardiovascular:
ABD/Gastrointestinal:

SOAPNote

The above screenshot shows a typical docuplate that is compatible with the SOAPware EM Coder. This docuplate can be entered into an encounter note (SOAPNote) to get started with EM Coding.

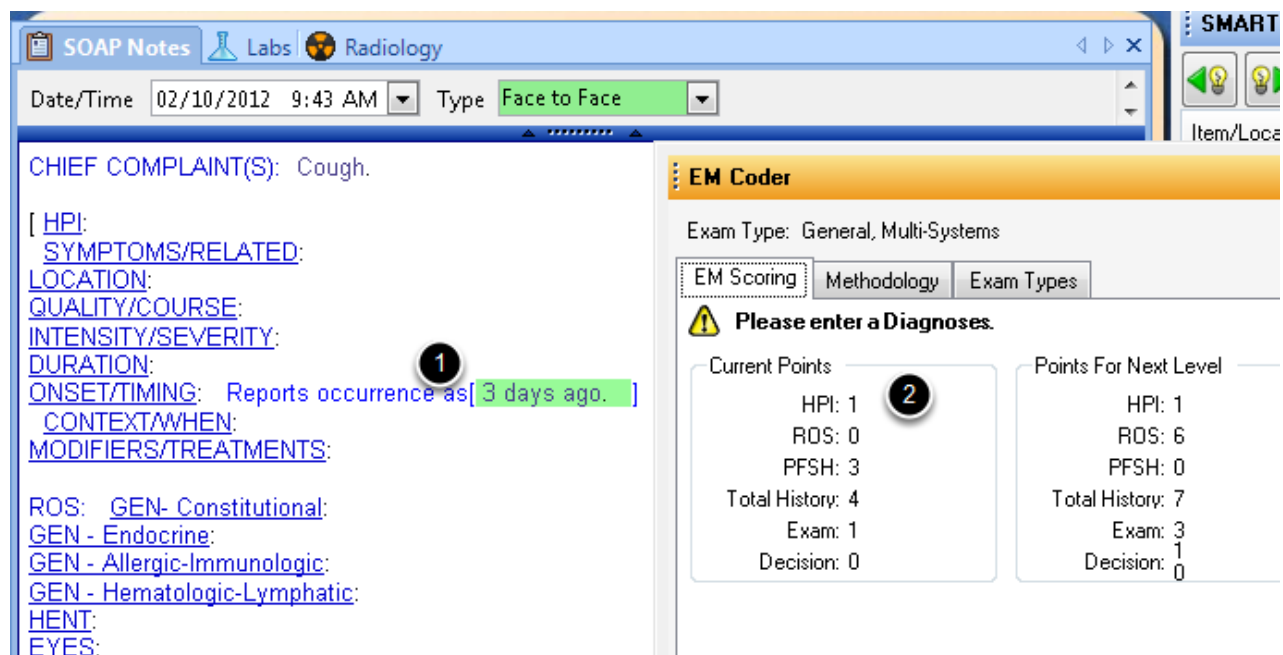
To insert this docuplate into an encounter, create an empty SOAPnote, then Click on the Insert button.

***Note:** Rarely are all of these headers in the outline utilized within any single, specific patient encounter. Therefore, "Remove Unused Items" automatically removes all the empty headers (the ones you do not address). Actually, what you are viewing are the **SMARTText "Headers"** for specific types of ST items. These are examples of the types SW uses to calculate the level of service. Each of these SOAPware headers represents an element defined in the documentation guidelines from CMS.



Clicking on the pick list headers (Click on Chief Complaint(s)) in a chart brings up a pick list of items that will display in the SMARTText Quick Access window.

HPI



Each header is associated with information (by selecting an item from the associated pick list or by typing comments using the click-and-type method), which then adds a point to the corresponding section.



As an example:

1. Select an item from "ONSET/TIMING: Reports occurrence as" (such as 3 days ago)
2. One (1) point is added to the EM Coder HPI score

SOAP Notes | **Labs** | **Radiology**

Date/Time: 02/10/2012 9:43 AM | Type: Face to Face

Subjective
CHIEF COMPLAINT(S): Cough.

[HPI:
SYMPTOMS/RELATED: Reports symptoms of fever, cough, sore throat
LOCATION: Reports area of involvement as chest.
QUALITY/COURSE: Reports condition is worsening.
INTENSITY/SEVERITY: Reports measurement (or degree) as mild.
DURATION:
ONSET/TIMING: Reports occurrence as 3 days ago.
CONTEXT/WHEN:
MODIFIERS/TREATMENTS:

ROS: GEN- Constitutional: Reports symptoms of fever (documented >10
GEN - Endocrine:
GEN - Allergic-Immunologic:
GEN - Hematologic-Lymphatic:
HENT: Reports symptoms of nasal congestion, sore throat, sinus problem
EYES:
LUNGS/Respiratory: Reports symptoms of [cough that is productive]
HEART/Cardiovascular:

EM Coder

Exam Type: General, Multi-Systems

EM Scoring | Methodology | Exam Types

Please enter a Diagnoses.

Current Points	Points For Next Level
HPI: 6	HPI: 0
ROS: 3	ROS: 0
PFSH: 3	PFSH: 0
Total History: 12	Total History: 0
Exam: 1	Exam: 0
Decision: 0	Decision: 0

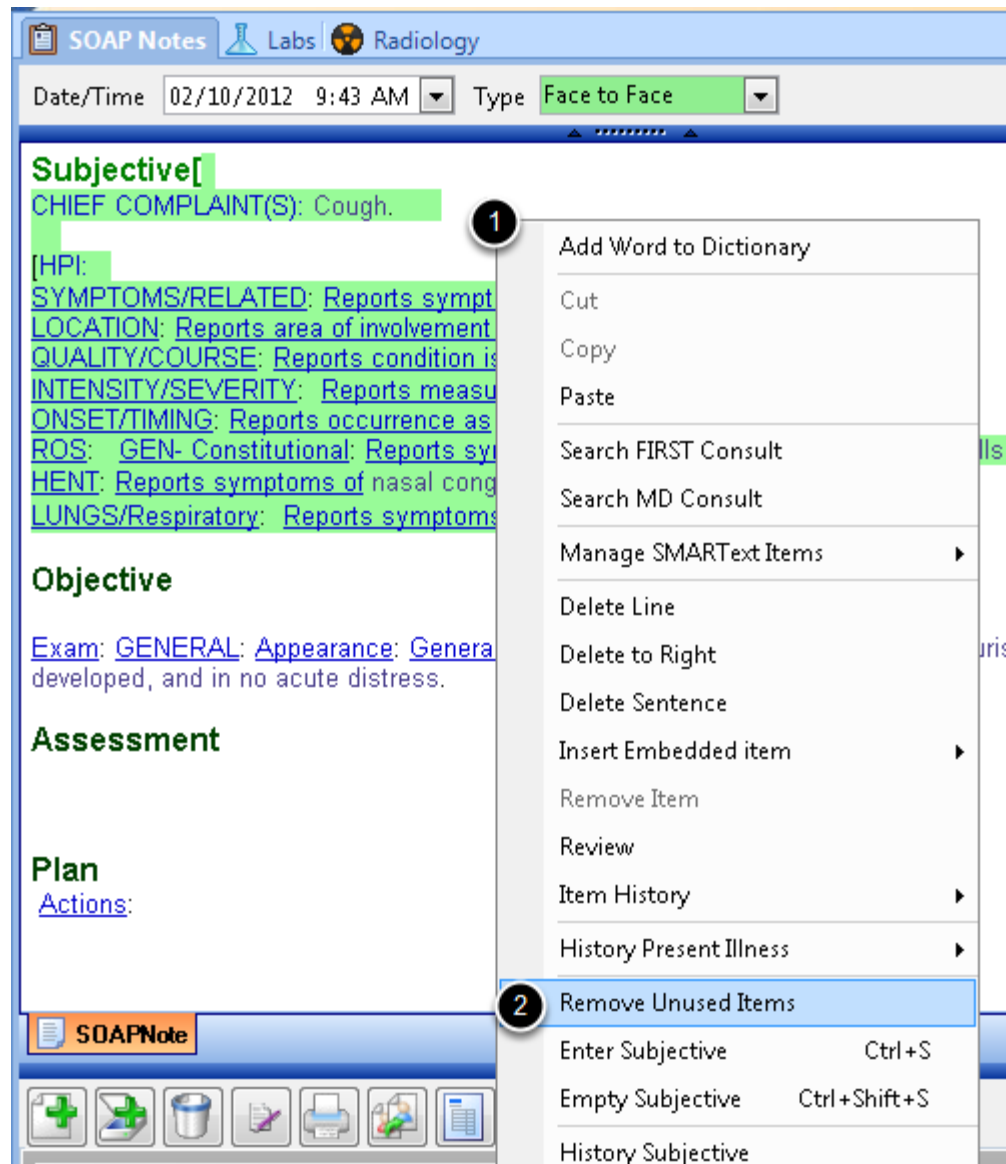
Level of Risk: 0 - Not Selected | ☐ New Patient

Calculate

The EM Coder current points will re-calculate after further documentation has been placed in the Chief Complaint, HPI, and ROS.



Remove Unused Items



To clean up documentation and remove any unused items.

1. Right click in the Subjective field
2. Left click on "Remove Unused Items". This will remove any headers left unused.



Past Family Social History (PFSH)

The image shows a screenshot of the 'EM Coder' software window. The title bar is yellow with the text 'EM Coder' and a close button. Below the title bar, it says 'Exam Type: General, Multi-Systems'. There are three tabs: 'EM Scoring' (selected), 'Methodology', and 'Exam Types'. A yellow warning icon with a triangle and exclamation mark is followed by the text 'Please enter a Diagnoses.' Below this, there are two columns of data. The left column is titled 'Current Points' and the right column is titled 'Points For Next Level'. In the 'Current Points' column, 'PFSH: 3' is circled in red. At the bottom, there is a 'Level of Risk:' label, a dropdown menu showing '0 - Not Selected', a checkbox for 'New Patient', and a 'Calculate' button.

Current Points	Points For Next Level
HPI: 6	HPI: 0
RDS: 3	RDS: 0
PFSH: 3	PFSH: 0
Total History: 12	Total History: 0
Exam: 1	Exam: 0
Decision: 0	Decision: 0

Level of Risk: 0 - Not Selected ☐ New Patient

Calculate

The PFSH information comes from specific sections of the medical summary.

Specific sections in the summary need to contain data elements in order for the coder to be able to add PFSH points to the score. EM coder checks to see if any of 3 groups of sections within the summary contain any data items.



Summary Vital Signs Demographics

Active Problems
Healthy ICD#V65.9

Inactive Problems
Respiratory symptoms/complaints ICD#786.00

Surgeries
Appendectomy.

Medications
Multi-Vitamins with Minerals: Multiple Vitamins with Minerals (tablet) SIG- 1 - once a day
Notes- i.e. Theragran-M and similar
]

Allergies
CODEINE:

Past History includes any information within any one of the five sections:

- Active Problems
- Inactive Problems
- Surgeries
- Medications
- Allergies

Social History

Social History
Single. Lives in condo. Drives. Employed. Strong social support network. No major economic difficulties.
Dose

Any information from the Social History section. This information may be free text or SMARText documentation.



Family History

Family History

PARENTS: [Anemia](#) ; [Diabetes - Type I](#); [Migraine](#):

GRANDPARENTS: [Migraine](#) ; [Epilepsy](#):

UNCLES/AUNTS: [Asthma](#) ; [Coronary artery disease](#)

OTHERS/DISTANT: [Cancer of Colon](#) ; [Obesity](#) ; [Mental Illness](#):

Any information from the Family History Section. This information may be free text or SMARTText documentation.

Past Family Social History (PSFH) can add up to 3 points to the history score. One point is added for each of the 3 groups, above, for any data items within them.

Understanding the role of **Social History** and/or **Family History** sections is easy because any data in either one adds a point to the history score. So, if both **Social History** and **Family History** have any information, a total of 2 points arises

The final encounter documentation, which is either printed or stored, must include at least some information from these “summary” sections to justify any level of service above level 3. If a level of service above level 3 is selected, the document design utilized to create the final documentation (either printed or stored) will need to include some of these summary sections in addition to the 6 fields in the SOAP encounter notes.



EM Coder: Exam

The Evaluation and Management Code allows users to automatically determine the level of service for encounter note documentation. The E&M Coder continually reports the complexity of history, exam, and decision-making, simplifying the process of determining the adequacy of documentation. This lesson will explain how this is calculated for the physical exam in SOAPware.

Exam

Objective

Exam:

GENERAL:

LYMPHATIC:

HEAD/EARS/NOSE/THROAT:

EYES:

NECK:

LUNGS and RESPIRATORY:

HEART (Cardiovascular):

ABDOMEN (Gastrointestinal):

MUSCULOSKELETAL (BJE):

FEMALE-GENITOURINARY:

BREASTS:

MALE:

NEUROLOGICAL:

PSYCHIATRIC:

SKIN:

The exam documentation is entered into the Objective section in SOAPware. There are 14 exam systems listed in the CMD/AMA documentation guidelines.

Exam Items generally - 1 point.

In the General Multi-Symptoms exam as defined by the CMS/AMA, there are close to 50 specific exam items that can be addressed. In general, each of anyone of these items included within an exam will add 1 point to the total exam score.



Objective

Exam:

GENERAL:

[General appearance can be described as](#)

LYMPHATIC:

[Axillary node exam reveals](#)

[Neck node findings include](#)

[Groin-Inguinal nodes demonstrate](#)

[Lymph node exams \(not axillary/neck/groin\) reveal](#)

HEAD/EARS/NOSE/THROAT:

[Larynx \(mirror\):](#)

[Oral Mucosa:](#)

[Teeth, Gums:](#)

[Communication:](#)

[Face palpation demonstrates](#)

[Facial strength demonstrates](#)

[Head and face exam reveals](#)

[Nasopharynx \(mirror\):](#)

[Pharyngeal Walls and Pyriform Sinuses:](#)

[Salivary glands reveal](#)

[Tongue evaluation demonstrates](#)

[Tonsil exam reveals](#)

[Ears-Nose \(external\) Inspection:](#)

[Otoscopy Exam:](#)

[Oropharynx demonstrates](#)

[Nose exam, internally, reveals](#)

[Teeth, Gingiva, and Lip Exams:](#)

[Hearing assessment shows](#)

EYES: Pupils and irises:

[Ocular Adnexa:](#)

[Ocular Motility:](#)

[Slit Lamp - Anterior Chambers:](#)

[Slit Lamp - Corneas:](#)

[Slit Lamp - Lenses:](#)

[Visual Acuity:](#)

[Visual Field:](#)

[Intraocular Pressure](#)

[Ophthalmoscopy:](#)

SKIN:

[Skin Palpation:](#)

[Skin Inspection:](#)

NECK: Thyroid exam reveals

[Jugular vein exam reveals](#)

[Neck tissue exam demonstrates](#)

LUNGS and RESPIRATORY:

[Lung auscultation elicits](#)

[Respiratory effort described as](#)

[Chest palpation reveals](#)

[Chest Percussion demonstrates](#)

HEART (Cardiovascular):

[Abdominal aorta exam reveals](#)

[Edema-Varicosity Exam:](#)

[Carotid artery findings include](#)

[Femoral arteries reveal](#)

[Heart auscultation discovers](#)

[Heart palpation reveals](#)

[Pedal pulses demonstrate](#)

ABDOMEN (Gastrointestinal):

[Abdomen percussion demonstrates](#)

[Bowel sounds found to be](#)

[Mass/Tenderness Exam:](#)

[Liver/Spleen:](#)

[Guaiac testing demonstrates](#)

[Anus and perineum inspection shows](#)

[Hernia checking discovers](#)

[Rectal exam finds](#)

MUSCULOSKELETAL (BJE):

[Gait and station demonstrate](#)

[Muscles:](#)

[Joint stability checking finds](#)

[Range of Motion:](#)

[Inspection-Palpation:](#)

[Back and Spine:](#)

[Right Lower Extremity:](#)

[Right Upper Extremity:](#)

[Left Lower Extremity:](#)

[Left Upper Extremity:](#)

[Head:](#)

FEMALE-GENITOURINARY:

[External genitalia show](#)

[Urethra findings include](#)

[Bladder palpation reveals](#)

[Cervical inspection detects](#)

[Uterus bimanual exam demonstrates](#)

[Adnexa palpation discovers](#)

[Vaginal inspection discovers](#)

[Rectal exam finds](#)

[Obstetrical exam demonstrates](#)

BREASTS:

[Breast inspection demonstrates](#)

[Breast palpation reveals](#)

MALE: Scrotum inspection shows

[Penis exam shows](#)

[Prostate digital exam reveals](#)

[Epididymides:](#)

[Testes palpation reveal](#)

[Urethral meatus demonstrates](#)

[Seminal vesicles demonstrate](#)

NEUROLOGICAL: Reflexes:

[Sensation:](#)

[Coordination:](#)

[Knowledge:](#)

[Language:](#)

[Cranial Nerves:](#)

PSYCHIATRIC: Insight and judgment appear

[Mood and affect are described as](#)

[Knowledge:](#)

[Language:](#)

[Psychotic Thoughts:](#)

[Speech:](#)

[Thought Processes:](#)

[Memory testing discovers](#)

[Associations:](#)

[Orientation is](#)

According to the E&M documentation guidelines, a level 5 encounter, must address no less than 18 (of about 50) exam items in no less than 9 (of 14) different systems. In contrast, a level 4 encounter must address at least 12 exam items in at least 2 different systems.

Once the documentation is completed, any of the physical exam elements in the objective field left blank can be automatically removed via the “Remove Unused Items” command in the Objective menu.

Earlier, the general statement was that one exam item would be equal to adding one point to the exam score. However, the rule of one point per item (that also contains associated information) varies slightly in dealing with 2 issues in the exam:



1- Vital Signs

	Graph	8/5/2011 1:19:44 PM	8/5/2011 1:58:56 PM
Blood Pressure	<input type="checkbox"/>	120/80	124 / 90
BMI	<input type="checkbox"/>	19.7	
Head Circum	<input type="checkbox"/>		
Height	<input type="checkbox"/>	60 in	
O2 Saturation	<input type="checkbox"/>		
Pulse Rate	<input type="checkbox"/>		
Res Rate	<input type="checkbox"/>		
Temperature	<input type="checkbox"/>	100.0 F	
Weight	<input type="checkbox"/>	100lbs 0oz	
Notes			

Vital Signs must include at least 5 of the 7 specified by CMS. These are recorded-entered while working within the Vitals manager and then are transferred from the Vitals Section to the encounter for scoring.

2- Lymph

[LYMPHATIC: Neck node findings include](#)
[Axillary node exam reveals](#)
[Groin-Inguinal nodes demonstrate](#)
[Lymph node exams \(not axillary/neck/groin\) reveal](#)

At least 2 of the 4 data item types associated with LYMPH: must have associated data in order to add the one point available for lymph.



Another type of exception to the usual flow within exam systems is encountered when dealing with Genitourinary item types. In this case there is an extra step to designate either male or female exam.

Decision Making:

EM Coder

Exam Type: General, Multi-S.

EM Scoring Methodology

Probable Level of Service -

Current Points

HPI: 0

RDS: 0

PFSH: 0

Total History: 0

Exam: 0

Decision: 2

Decision-Making section of the CMS documentation guidelines is comprised of 3 subcategories:

- **1 - Number of Problems/Diagnoses**
- **2 - Data/Studies**
- **3 - Level of Risk**

While the first 2 subcategories are a little more specific, the section dealing with level of risk is open to interpretation and not easily automated. Because the level of risk is very much subjective, there is no good way to accurately automate its value within a computer-based medical record. As a compromise, the SOAPware coding wizard simply adds one point for each diagnosis listed in the assessment field when it is calculating the subcategory dealing with the level of risk.

Therefore, it is extremely important to review the calculated risk score before accepting any suggested level of service.

Level of Risk: 1 - Minimal

☒ New Patient



1 - Number of Problems/Diagnoses

Options

Chart Layouts
Chart Rack
Document Designer
Docuplates
Logging
OCR
Pharmacy Manager
Pulled Charts
Scanning
SMARText
SMARText Color Coding
Structured CPT
Structured Dx
Structured Immunization Entry
Structured Order Entry
Structured Rx
Summary To SOAP
Toolbars
Vital Signs
Workflow

Include the following items:

<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Status
<input type="checkbox"/> Lay Term	<input type="checkbox"/> EncounterDates
<input checked="" type="checkbox"/> ICD#	<input type="checkbox"/> Cause
<input type="checkbox"/> Responsible MD	<input type="checkbox"/> Subjective
<input checked="" type="checkbox"/> Onset	<input type="checkbox"/> Objective
<input type="checkbox"/> Resolved	<input type="checkbox"/> System
<input type="checkbox"/> Orders	<input type="checkbox"/> Variable
1 <input checked="" type="checkbox"/> Plan	<input type="checkbox"/> Value
2 <input checked="" type="checkbox"/> Course	<input type="checkbox"/> Location
<input type="checkbox"/> Recorded	<input type="checkbox"/> Extent
<input type="checkbox"/> Diagnosing MD	<input type="checkbox"/> Duration
3 <input checked="" type="checkbox"/> Initial Date	<input type="checkbox"/> Comments

Close

To allow the necessary sub-items in the Structured Dx to be automatically placed in the chart and perform EM coding, go to Tools> Options>Structured Dx, and place checks in the boxes in front of :

1. Plan
2. Course
3. Initial Date

For calculating Number of Problems/Diagnosis score, the SOAPware automatic coding wizard will look at each of the lines in the Assessment field...if the line contains a diagnosis and if it also includes the encounter date (i.e. this is to indicate a new diagnosis), and if there are specific



instructions given such as “(See Plan)”, and if it includes “uncontrolled” or “worsening” in course, then 4 points are added to the Decision Making score.

There is no maximum point total here with this rule, so if 3 lines meet these criteria, then 12 points are added to the point total. For example, if 3 similar diagnosis ST items (and sub-items) placed into the objective field, then 12 points are added to the score.

2 - Data/Studies

Plan

[Actions:](#) [Plans for New Diagnosis:](#)

[Lab/Tests:](#)

[X-rays:](#)

[Studies \(other than lab or x-ray\):](#)

[Old Records Requested:](#)

[Discuss with physician:](#)

[Summary updated:](#)

[Second Interpretation:](#)

[Plans \(Other\):](#)

For calculating the Data subset of the Decision Making score, the automatic coding wizard will look into the plan field. **In order for the E&M coder to function properly, it is necessary to include specific ST item types designed to be recognized as addressing data, studies, etc.** This is an example of the list of headers that are displayed by a set of specialized ST items designed to function within the EM Coder.

Data points are added to the Decision Making score based upon the following formulas:

- [Lab/Tests](#): 1 point
- [X-rays](#): 1 point
- [Studies\(other than lab or x-ray\)](#): 1 point
- [Old Records Requested](#): 1 point
- [Discuss with physician](#): 1 point
- [Summary updated](#): 2 points
- [Second Interpretation](#): 2 points

Data points are only added when data is associated with the pick lists above by either selecting an item from the pick list, or inserting the correct SMARText items.



Data points are added when data is associated with the ST items types designed for use in the Plan. For example, if “[Lab/Tests](#).” is changed to “[Lab/Tests](#): CBC” then 1 point is added to the Data subset of the Decision Making score.

[Plans for New Diagnosis](#): - This would be where you would place plan items for any new diagnosis that have been placed into the Assessment field (i.e. those which have the date added and the text “(See Plan)” as below:

Assessment

Diabetes mellitus type II ICD#250.00 [Onset](#): [Initial Date](#): [Orders](#): [Plan](#): See Plan

Plan

[Plans for New Diagnosis](#): Diet - Dietary consultation for 1800 cal ADA diet.

[Lab/Tests](#): - This line is where you would place documentation for planned laboratory studies or testing. For example...

[Lab/Tests](#): 85025 - LAB, CBC-complete....**adds 1 point**.

[X-rays](#): - This line is where you would place documentation for radiographic items. For example...

[X-rays](#): 71020 - X-Ray, Chest, 2 views, AP/lateral. ...**adds 1 point**.

[Studies\(other than lab or x-ray\)](#) - This line is where you would place documentation for other types of studies other than labs or x-rays. For example...

[Studies\(other than lab or x-ray\)](#): 93010 - EKG, Interpretation only. ... **adds 1 point**.

[Old Records Requested](#): - This line is where you would place documentation of the fact that outside medical records are being obtained. For example...

[Old Records Requested](#): Record Release obtained requesting old records from the hospital....**adds 1 point**.

[Discuss with physician](#): - This line is where you would place documentation of the fact that you consulted or discussed with another physician. For example...

[Discuss with physician](#): Neurologist, Dr. Davis regarding need for MRI of head....**adds 1 point**.

[Summary updated](#): This line is where you would place documentation of the fact that you have updated information within the medical history which in SOAPware would be the fields on the Summary side. For example...

[Summary updated](#): The summary record was updated with pertinent information from previous records (10-20 minutes)....**adds 2 points**.

[Second Interpretation](#): - This line is where you would place documentation of the fact that you have rendered a second opinion. For example...

[Second Interpretation](#): The previous treatments were reviewed and an assessment given. ...**adds 2 points**.

These 8 elements determine the score for the “Data” portion of the Decision Making section. Any elements left blank are automatically removed by selecting the “Remove Unused Items” in the Plan menu.



3 - Level of Risk.

Level of Risk: 1 - Minimal ▼ ☐ New Patient

0 - Not Selected
1 - Minimal
2 - Low
3 - Moderate
4 - High

Calculate

Determining the third category of Decision Making, the Risk Score, is very difficult to accomplish automatically. Of all the elements of EM coding, it is the least defined. The guidelines list several examples of different patient encounters and then assign risk levels rather than delivering any specific rules. Without rules or logic, it is only possible for the software to make guesses. The “guessing” logic SOAPware E&M coder uses is simply to add one point for each of the first 4 diagnoses that are listed in Assessment. Obviously, this will rarely reflect the actual level of risk. **Before accepting any suggested level of service, you should always check for the appropriate risk score. EM Coder auto selects a level of risk that will be labeled be in red...**

This tells the user that the machine has selected it for them. The user should select a level of risk by clicking on the down arrow.

- 1 - Minimal =1 point
- 2 - Low risk =2 points
- 3 - Moderate risk =3 points
- 4 - High risk =4 points



Level of Risk	Presenting Problem(s)	Diagnostic Procedure(s) Ordered	Management Options Selected
Minimal	One self-limited or minor problem, eg, cold, insect bite, tinea corporis	Laboratory tests requiring venipuncture Chest x-rays EKG/EEG Urinalysis Ultrasound, eg, echocardiography KOH prep	Rest Gargles Elastic bandages Superficial dressings
Low	Two or more self-limited or minor problems One stable chronic illness, eg, well controlled hypertension, non-insulin dependent diabetes, cataract, BPH Acute uncomplicated illness or injury, eg, cystitis, allergic rhinitis, simple sprain	Physiologic tests not under stress, eg, pulmonary function tests Non-cardiovascular imaging studies with contrast, eg, barium enema Superficial needle biopsies Clinical laboratory tests requiring arterial puncture Skin biopsies	Over-the-counter drugs Minor surgery with no identified risk factors Physical therapy Occupational therapy IV fluids without additives
Moderate	One or more chronic illnesses with mild exacerbation, progression, or side effects of treatment Two or more stable chronic illnesses Undiagnosed new problem with uncertain prognosis, eg, lump in breast Acute illness with systemic symptoms, eg, pyelonephritis, pneumonitis, colitis Acute complicated injury, eg, head injury with brief loss of consciousness	Physiologic tests under stress, eg, cardiac stress test, fetal contraction stress test Diagnostic endoscopies with no identified risk factors Deep needle or incisional biopsy Cardiovascular imaging studies with contrast and no identified risk factors, eg, arteriogram, cardiac catheterization Obtain fluid from body cavity, eg lumbar puncture, thoracentesis, culdocentesis	Minor surgery with identified risk factors Elective major surgery (open, percutaneous or endoscopic) with no identified risk factors Prescription drug management Therapeutic nuclear medicine IV fluids with additives Closed treatment of fracture or dislocation without manipulation

This table, provided by CMS, demonstrates some examples as to how to determine the risk level.

Level of Risk: 3 - Moderate ☐ New Patient

Changing the Level of Risk: by making a selection causes the text to turn black

Note, leaving the encounter (going to another encounter or chart) causes the EM Coder to change the “Level of Risk” label back to red or unverified.