SmartNotes and Forms

The Basics

Before we get started, you should be familiar with the difference between SmartNotes and Forms (**See Appendix A for examples**)

Understanding these basics will help us determine when it is best to use a Form or SmartNote. As a rule of thumb, any specialists who require the information in their clinical records to be used in their correspondence with other practitioners should use forms. See the 'Merging form data to Tword' demonstration for more on that.

Creating and Managing Forms

The following Videos will guide you through editing a form or creating one from scratch

Introduction to Forms
Creating and Editing Forms

Appendix B of this document contains examples of question types. Knowing how question types work is very important in form design as this will allow you to select the best option.

Likewise, Appendix C of this document describes some of the options required to control the appearance of your form.

It is recommended that you get familiar with the information contained in Appendices B and C, and use them for reference after watching the videos while you create and edit your own forms.

Creating and Managing Phrases

Phrases are created from within the notes interface, so step 1 is to open a new note. On the notes window is the Phrase Toolbar:

From left to right, the buttons do the following:
- Insert Phrase into note.
- Create New Phrase
- Manage Phrases for this Context
- Manage Global Phrases

Global phrases, as the name suggests, are phrases that are accessible from any part of the program. **Context phrases** become only available in the given context. So if you are working on a phrase control located within a form, that phrase becomes available only within that form.

Inserting A Phrase
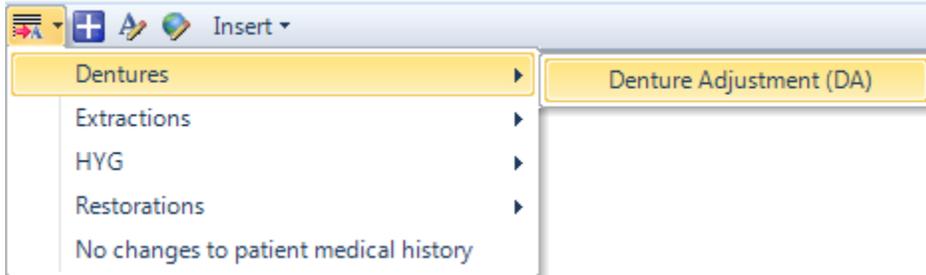
Selecting the 'Insert Phrase' button presents the user with a list of existing phrases to insert. In this example, there are 4 categories (Dentures, Extractions, HYG, Restorations). There is also an uncategorized phrase ('No changes…'). By selecting a category you expand it and see the phrases within that category. In our example, the Dentures category has 1 phrase – Denture Adjustment. Lastly, you will note that there is text in brackets – this is the keyboard shortcut. By typing in the keyboard shortcut in a note, then hitting the spacebar, you can insert a phrase without using your mouse at all.

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Create New Phrase

Details

Phrase: Denture Adjustment

Patient presents to dental clinic for denture adjustments
Past medical history and radiographs reviewed. Medication reconciliation completed.
Patient presents to clinic for follow-up denture adjustment. All adjustments made with acrylic burs and pip paste. Patient satisfied, patient tolerated procedure well. Patient's level of understanding was good. Patient dismissed in good condition.
NV: Denture adjustments as needed

[Insert Field]

Shortcut: DA

Menu Label: Denture Adjustment

Category: Dentures

- Type your phrase text in the large textbox labeled 'Phrase'.
- If you would like to have a text shortcut, enter that.
- Enter a short, descriptive Menu Label that makes the phrase easy to identify.
- If desired, select a category for the phrase. If the category does not exist in the list, simply type in a new category and it will then be created.
- Click OK and you have created a phrase!

Managing Phrases

The manage windows allow you to add, remove, edit and sort your phrases.

Creating SmartNotes

SmartNotes are created and managed no differently than Phrases. The only difference is that we add some variables in the form of questions along the way. See Appendex B of this document to brush up on your data types. Now you are ready to create your own. The following video will guide you:
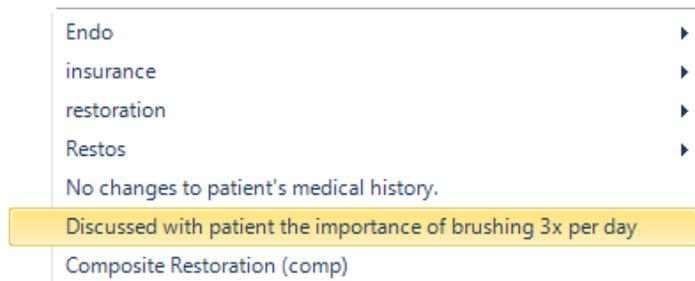
http://bridge-network.com/t11videos/smartphrases/Index.html

Appendix A – Examples

Notes
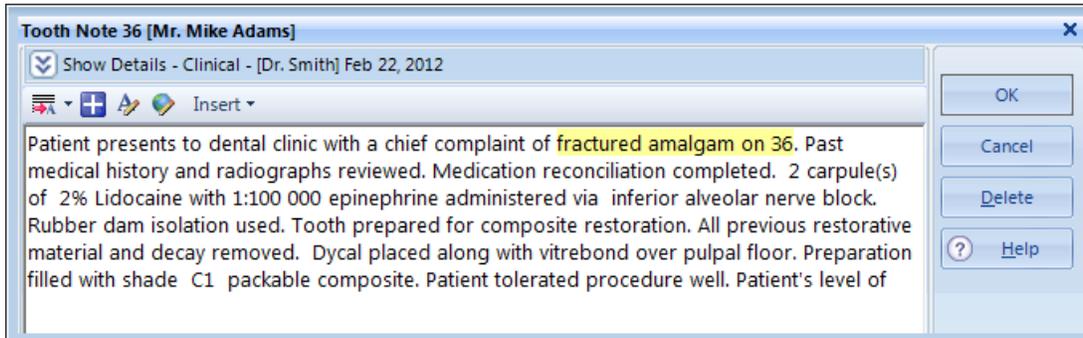
Text can be typed into the note. The use of phrases can streamline the process. Text can be formatted to highlight areas of particular interest.

Phrases

This Phrase control has a number of categories (Endo, Insurance, restoration, Restos) which can be expanded to reveal related phrases. It also has 3 uncategorized phrases. Selecting the phrase basically copies and pastes that text into the note, saving the user from having to type that text.

SmartNotes

By Answering the questions (shown in the upper image) the SmartNote generates the final paragraph style note using the answers supplied and merging them to a template.

Forms

Forms are simply a matter of answering questions. Often the answers are contained in pre-defined options and are just a matter of selecting them. Text boxes and phrase controls can be used to allow additional information to be entered.

Visual Forms
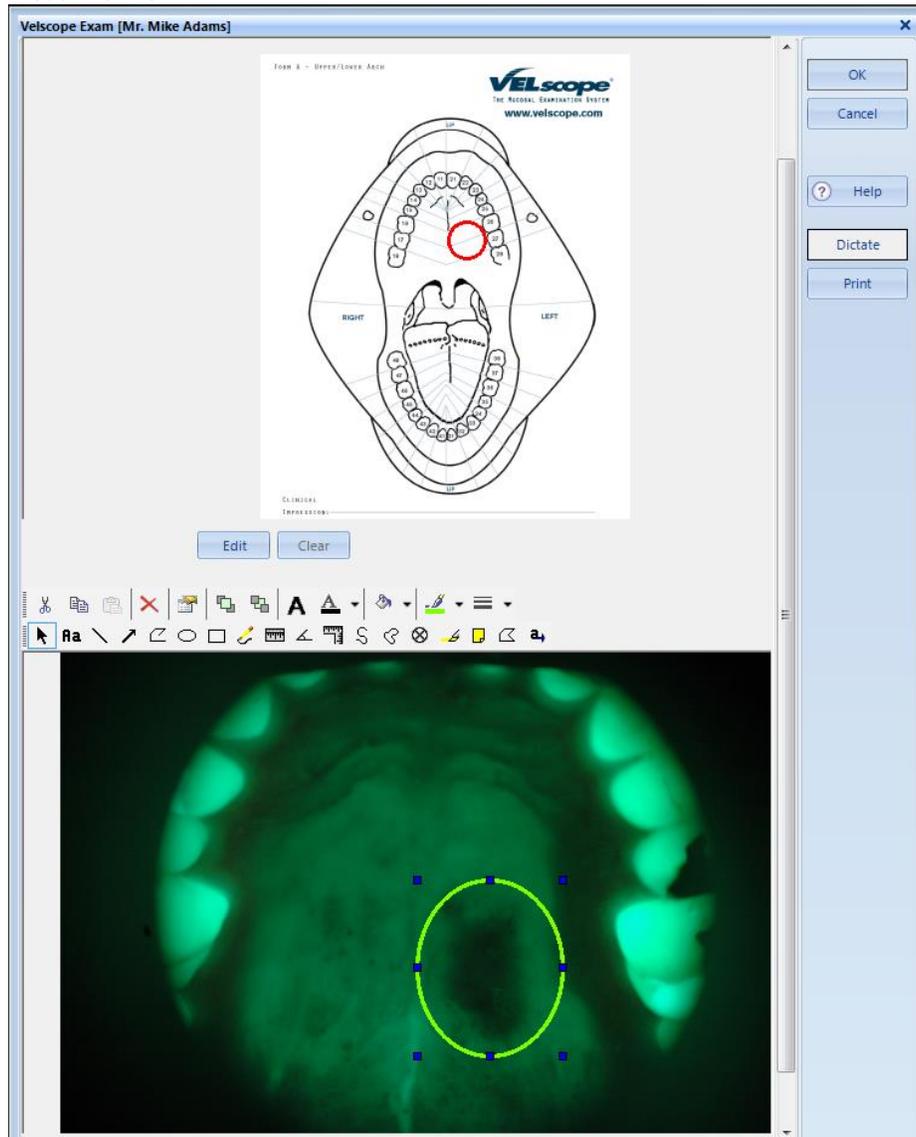
In this example of a Visual Form the top image is part of the form template and exists in all instances of the form. The lower image is imported from the specific patient's file. Both images can be annotated to communicate information.

Appendix B – Question Types

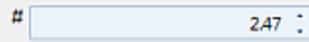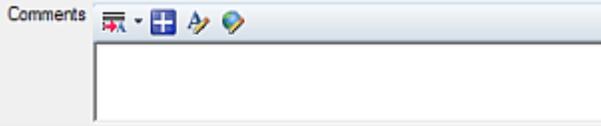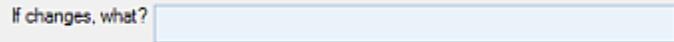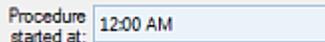| Question Type	Purpose	Example
Checkbox	Single option that is either true or false.	Sutured 4-0 gut ☐
Checkbox Group	Multiple options, user can choose more than one (or none).	Rx ☐ Ibuprofen / ☐ Tylenol / ☐ Tylenol #3 / ☐ Amoxicillin / ☐ Clindamycin
Combo Box	User selects from a drop-down list of pre-defined options.	Osteotomy [▼] — Brand / Lot # — Handpiece / Osteotome / Combination Osteotome and Handpiec
Currency	Field is formatted for a dollar amount; user enters amount directly or uses arrows.	Estimated cost $0.00
Date	User enters or selects date from calendar, formatted as mmm/dd/yyyy.	Follow up date. Aug 4, 2011 [▼]
Date Time	User enters or selects date from calendar, formatted as mmm/dd/yyyy. Enters time.	Next scaling Jul 27, 20 [▼] 10:32 AM
Editable Combo Box	User selects from a drop-down list of pre-defined options or can enter their own text.	Local Anaesthetic [▼] — Diameter / Type — carps Lidocaine 2% 1:100k epi / carps carbocaine plain / carps Xylocaine 2% 1:100k epi
Image *<for use in form templates only>*	Includes image editing tools. If an image was selected during the form design, it is shown and the user can edit as required. If no image was defined as part of the form template, the user can import an image or select an image already in the image library, then edit as required.	Velsope [toolbar]
Integer	Restricts entry to whole number; user enters number directly or uses arrows.	PSR 7
Label	Allows you to enter text without prompting for a question. This type of question is useful for consent or informational statements and can be formatted with basic styles such as bold, underline and italics. Labels can comprise entire paragraphs.	Anaesthetic to be used
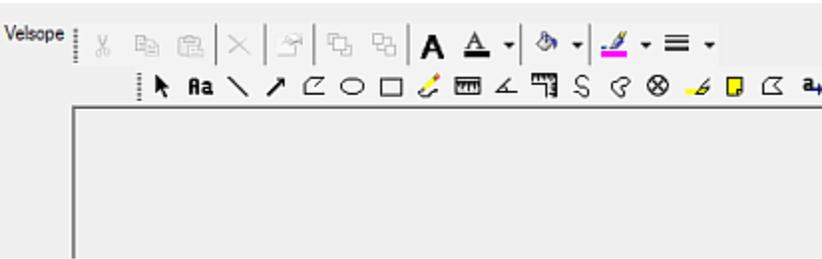
Number	Number entry can include decimal point; user enters number directly or uses arrows.	# 2.47
Option Set	Multiple options, user can only choose one.	Bone Type ⦿ I ◯ II ◯ III ◯ IV
Phrase Control **Small Phrase Control**	Allows user to select a pre-defined phrase, or create new ones. Both phrase controls allow for any length of phrase to be entered; the Small Phrase Control takes up less space on the screen but you may have to scroll to see the entire phrase.	Comments
Text	For free-form text entry.	If changes, what?
Time	User enters or selects time.	Procedure started at: 12:00 AM
Tooth Collection	Includes standard tooth chart for user to select one or more teeth.	Tooth Number 18 17 16 15 14 13 12 11 21 22 23 24 25 26 27 28 48 47 46 45 44 43 42 41 31 32 33 34 35 36 37 38 55 54 53 52 51 61 62 63 64 65 85 84 83 82 81 71 72 73 74 75 C
Topaz Signature Pad	Allows for use of a digital signature pad.	Patient Signed Consent Clear Ready To Write
Touch Signature	Allows for signatures via stylus	Patient Signed Consent Clear Ready To Write
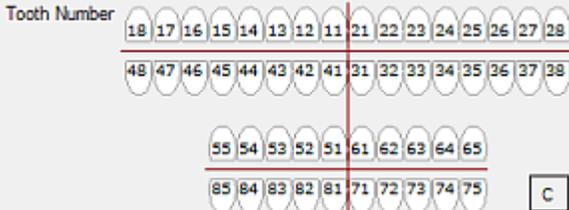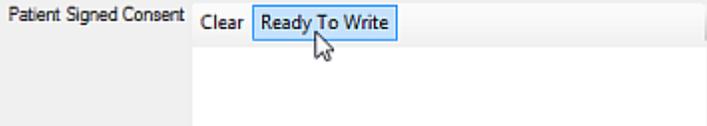
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Web Contact Info

<for use with eForms only>

Prompts patients for all personal information necessary to start their chart in Tracker.

Read only Contact Information from a Web Form.

Title		First Name	
Address		Address2	
Province State		City	
Date of Birth	Jan 16, 2015	Gender	
Home Phone		Mobile Phone	
Other Phone		Preferred Phone	
Email		Contact Method	
Employer/School		Occupation	
Emerg. Contact First Name		Emerg. Contact Last Name	
Referred By		Short Notice	

Web Insurance Info

<for use with eForms only>

Prompts patients for all insurance information necessary to start their chart in Tracker.

Read only Insurance Information from a Web Form.

Primary		Secondary	
Subscriber Name		Subscriber Name	
Relationship		Relationship	
Insurance Name		Insurance Name	
Policy Number		Policy Number	
Subscriber Date of Birth		Subscriber Date of Birth	
Subscriber Id		Subscriber Id	
Group Number		Group Number	
Customer Notes		Customer Notes	
Employer		Employer	

Web Link

<for use with eForms only>

Ability to add a customized link to your form. Link will either be embedded (youtube video) or open a new tab in browser.

Year and Month

User enters or selects date from calendar, formatted as mmm, yyyy.

Next full exam   August, 2011

Yes No

Inserts Yes, No, and n/a radio buttons; user can only pick one.

Medical History Reviewed? ○ Yes ○ No ○ n/a

Appendix C – Form Question and Section Options

Section Options

Forms are divided into sections in order to visually and logically group questions. The section options allow you to control the appearance of a section.

The section header is pictured below:

Section Title	In the example above, it is set to MEDICAL INFORMATION
Section Instructions	In the example above, this is the text highlighted in yellow reading 'Dental professionals primarily treat...'. This text can be formatted in the editor

Question Options

Each Question has a number of options which allow you to control how the question looks and behaves. These are summarized below:

|	
Data Type	See Appendix B of this document for details.
Question	This is the text that appears to the user on the form
!	This option only appears for forms with an Alert Mode of Question. Selecting this checkbox means that any positive answers to the question will produce a medical alert in the patient file.
Options	Some question types require additional information which is entered via options. These questions are indicated by the icon. Clicking on that icon will allow the options to be

entered. For example, this is where the selections in a combo box are entered.
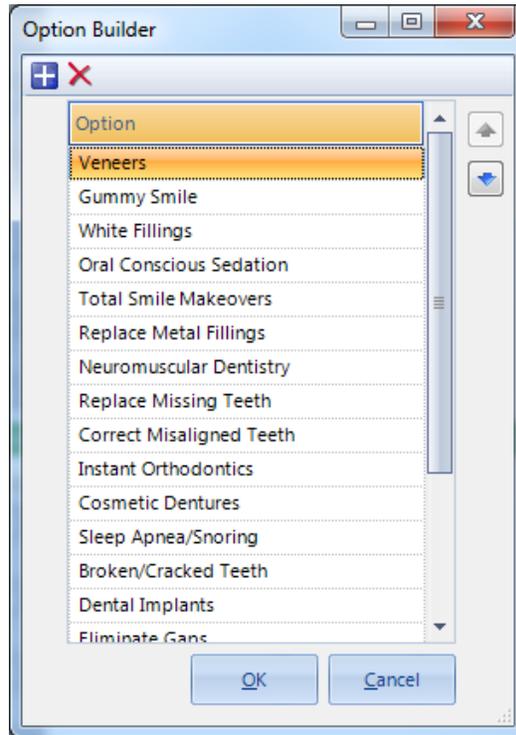
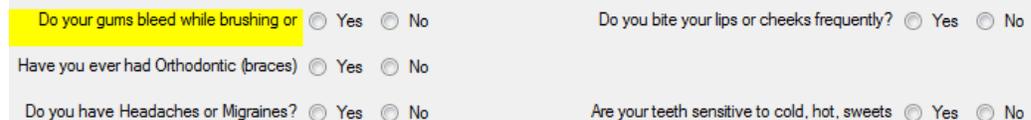
The above options are for a checkbox group (shown below).
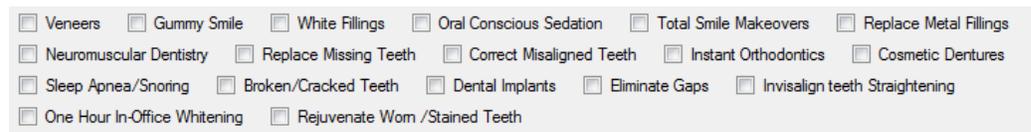
Required	Selecting the 'Required' checkbox indicates that the question must have a response. The form will not be saved without one. Typically this is used for online forms completed by patients to make them aware when they have not answered important questions.
Col Span	A section in a group may have multiple columns. By default all questions span 1 column. If a question needs to span across more than 1 column, this is indicated here. This allows questions to appear on the form in the best position. In the example above, the section has 2 columns. However, the question 'Have you ever had Orthodontic (braces) has a column span of 2 so it takes up both columns and the next question is on the following row.
Hint Text	This is a short text that appears in a textbox on online forms filled out by patients. This can be used to help clarify questions that may be challenging for patients.
Highlight	Selecting the 'Highlight' checkbox will produce a yellow highlighter effect on the question. This can be useful for making important questions stand out.

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Do your gums bleed while brushing or flossing? ◎ Yes   ◎ No

Have you ever had Orthodontic (braces) Treatments? ◎ Yes   ◎ No

Omit Online	Selecting the 'Omit Online' checkbox will hide that question from online Eforms which are filled out by patients at home.