Wolf EMR® SMART Forms

User Guide

Wolf EMR 2015.1
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TELUS HEALTH™
Information for Life.

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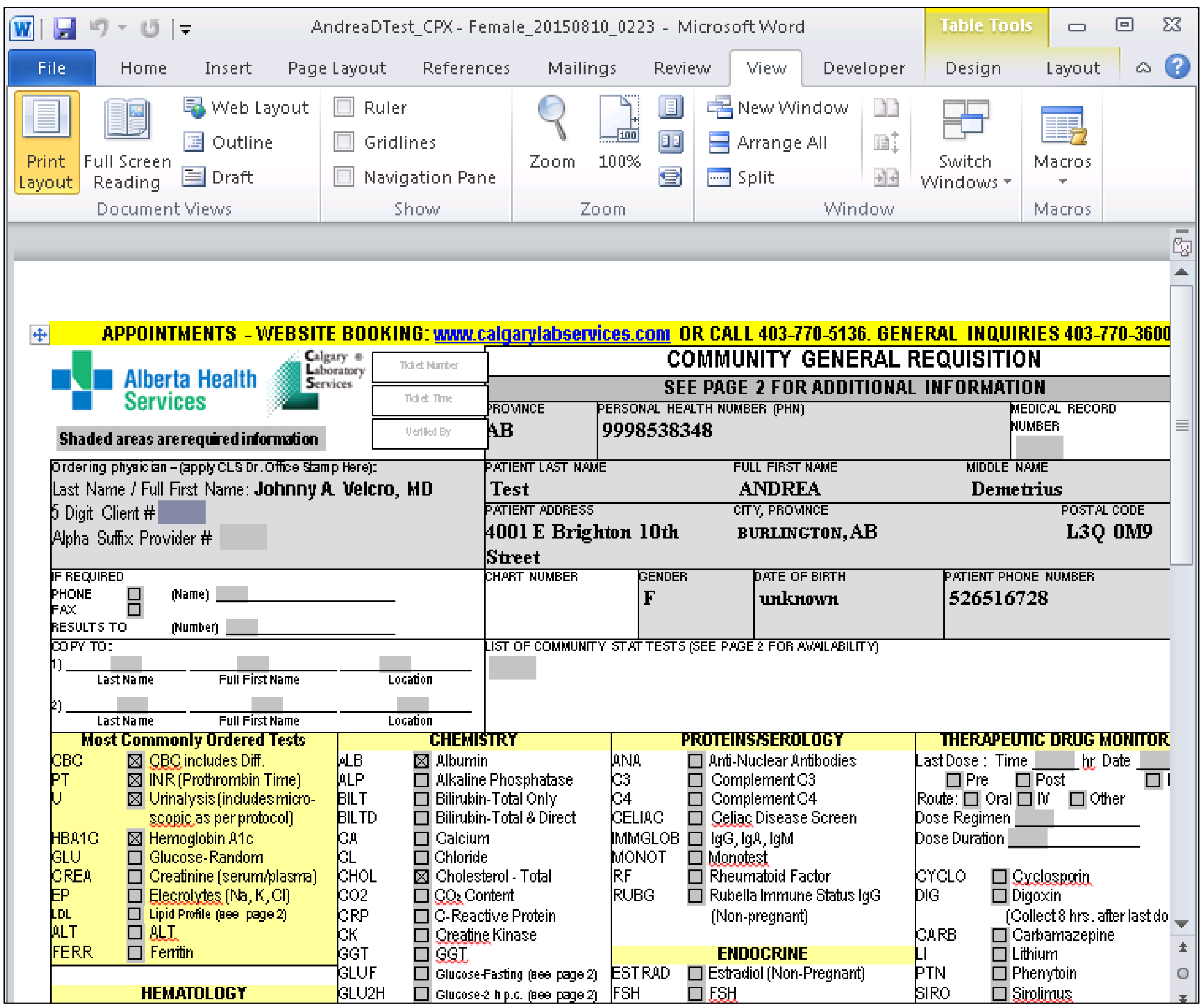
Introduction to SMART forms

SMART forms are Microsoft Word-based form and letter templates. You can use SMART forms to create electronic versions of standard forms (such as lab requisitions and government forms), which you can open and fill out in Wolf EMR. You can also use SMART forms as letter templates for consult letters and referral letters. Using SMART forms, you can:

- Pre-populate select patient demographic and other medical information from the EMR into an electronic version of a form or letter.
- Input data into designated text fields and check boxes.
- Populate the **PLAN** area of your SOAP visit notes with a list of investigations that were ordered using SMART forms.



Wolf EMR contains SMART forms for the most common provincial and regional requisition forms. SMART forms are stored in the Wolf EMR data center, and are available to all Wolf EMR clients. If the Wolf development team creates a SMART form for other clinics in your region, the form is automatically available to you from your SMART forms list.

Using Microsoft Word, you can modify SMART forms provided by TELUS Health. SMART forms you modify are available only to your clinic, and cannot be deleted or updated by TELUS Health.

If you have other form needs, you can build the forms yourself in Microsoft Word. It is highly recommended that you take the SMART forms course before you build your own SMART forms. For more information on the SMART forms course, see the Catalog of Wolf EMR Courses. A SMART forms course is also hosted during every TELUS Health User Conference.

You can hire TELUS Health technical staff to build forms for you. For more information, contact the Wolf EMR support team.

Using SMART forms

You can open, fill out, and print a SMART form from almost any window related to a patient (any window containing the SMART patient banner).

Complete the form by selecting check-boxes, entering data in text fields, and selecting items in drop-down lists.

Once you print or save a SMART form for a patient, the form is saved in the **Documents** tab of the patient's medical summary, and becomes a permanent part of the patient's chart.

Opening SMART forms

To open a SMART Form:

1. On any window related to the patient (including a patient's Medical Summary, SOAP form, Consult Letter Examination form, or Patient tab), right-click. The EMR displays the SMART Menu.
2. On the SMART Menu, click one of the following options:
   - **SMART Forms**: To view all available SMART Forms in your system.
   - **New Requisition**: To view only SMART forms categorized as requisition forms.
   - **Favourite Requisition**: To view only SMART forms categorized as requisition forms and identified as favourites.
   - **Favourite Order Set**: To view only order set SMART forms identified as favourites. See "Order sets" on page 72.

You can also access SMART forms directly from your visit notes, and open SMART form letters from referrals, or consults:

Visit notes

- On the SOAP Note Examination Form: In the **Assessment** area, click **Order Labs**.
- On the Consult Letter Examination Form (Specialists): To the right of the main text area, click **Order Labs**.

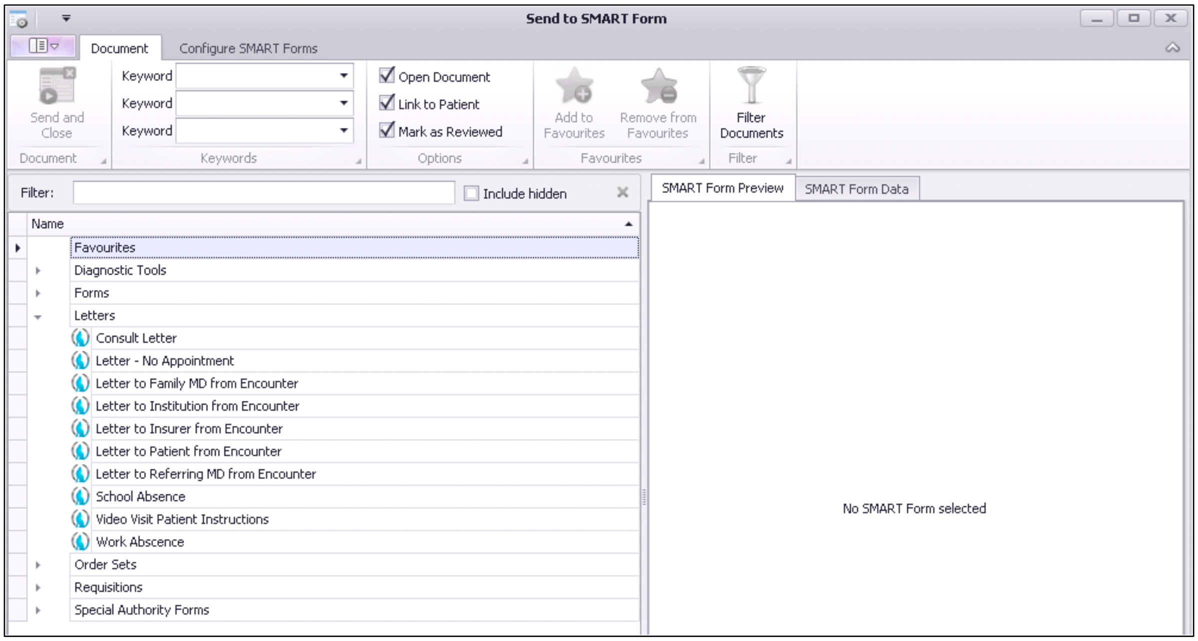
Referrals

- On the New Referral window, enter the referral information, and then in the **Send to SMART Form** area, click . The referral letter template that displays depends on the default SMART form you have set. See “Setting a SMART form to be a default referral letter” on page 35.

Consults

- On the Consult Letter Examination window, right-click and then, on the SMART Menu, click **SMART Forms**. Find and select your consult letter SMART form. The EMR opens the SMART form letter template with your visit notes populated.

The EMR displays the Send to SMART Form window, with a list of available SMART Forms displayed in the left column.



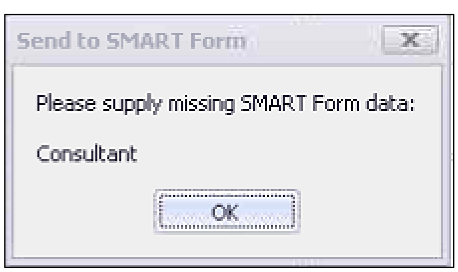
3. In the list of SMART Forms, expand the category of forms you want to view, and then click the form. The EMR displays the selected form on the right side of the window.
4. If you cannot find the form you want:
   a) In the **Filter** field, enter a search term (for example, “MRI”). The EMR filters the SMART form list to display only SMART forms containing your search term.

Tips for entering search criteria

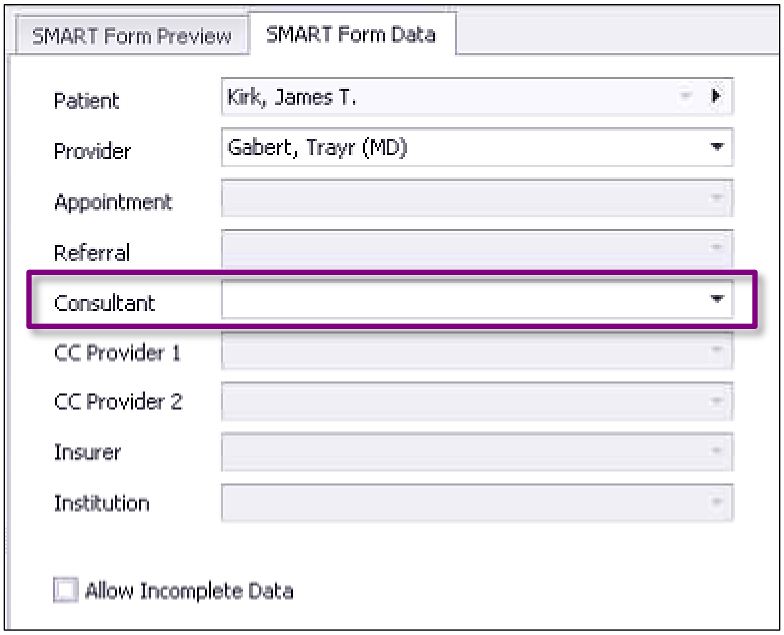
- Most lab requisitions contain the word “**Lab**”
- Most diagnostic imaging requisitions contain either “**DI**” or “**Imaging**”.
- SMART forms are named by region (for example, “**AB Cg**”), or company/type (for example, “**CDC**”, or “**MIC**”).

Enter these search criteria to quickly find the form you want.

   b) In the filtered list of SMART Forms, click the form you want. The EMR displays your selected form on the right side of the window.
      - If the SMART form is programmed to pull information from the patient’s record, but the information is not available in the current patient’s record, the EMR displays a dialog box similar to the following,



and then displays the **SMART Form Data** tab, where you can enter the missing data.



Enter the missing data in the fields provided, or, to produce the SMART form without the missing data, select the **Allow Incomplete Data** check box.

- If the SMART form contains an electronic signature, the EMR displays a dialog box with a prompt similar to the following.

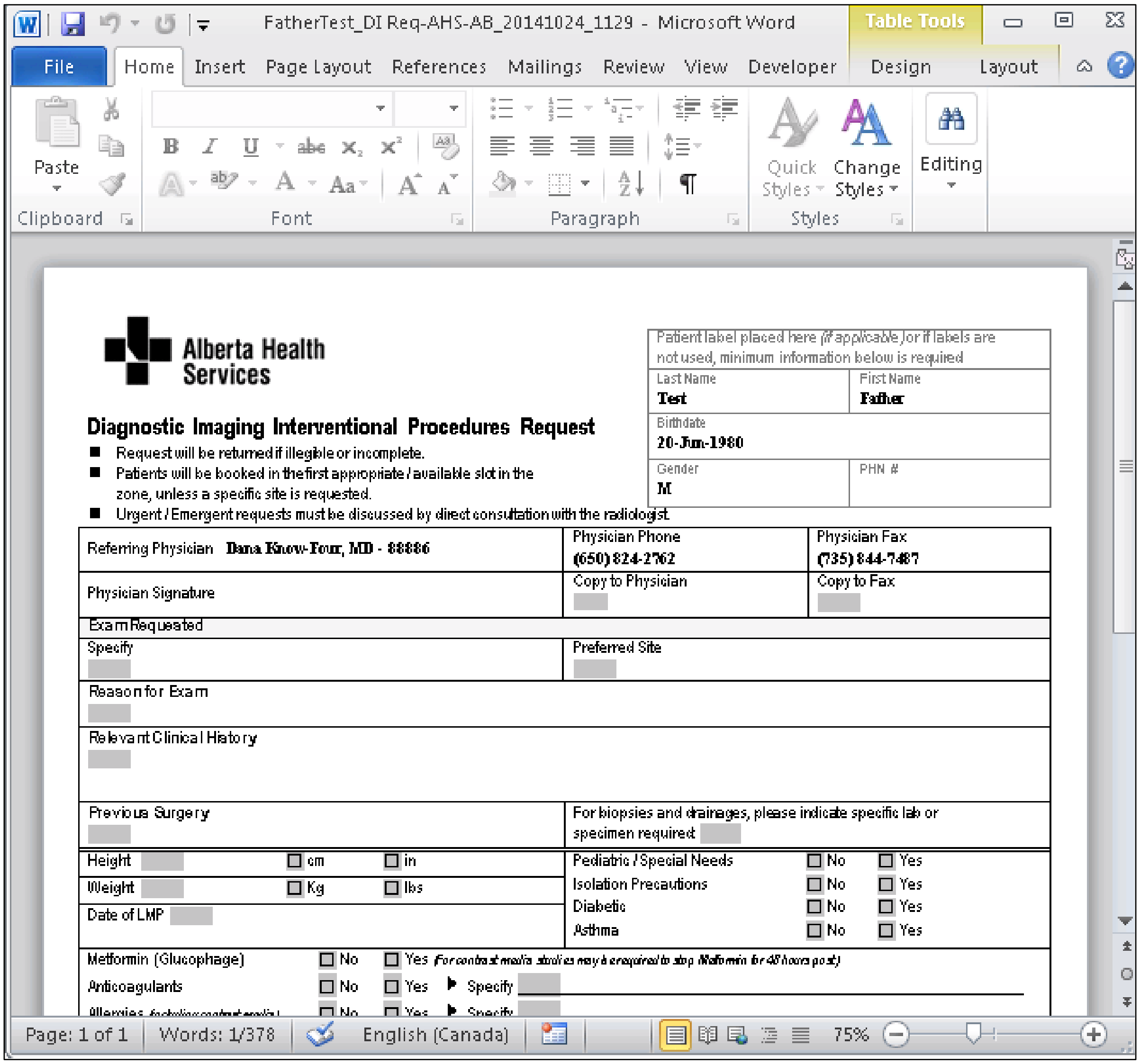
To insert your signature, click **Yes**.

5. In the SMART forms list, double-click the form, or click **Send and Close** ( ). The EMR opens the form in Microsoft Word.

Completing SMART forms for patients

To complete a SMART form for a patient:

1. Open the form. See "Opening SMART forms" on page 7. The EMR opens the SMART Form in Microsoft Word, with editable check boxes, text fields, and drop-down lists highlighted in grey.



2. Select any check boxes you want, and enter text in fields highlighted in grey.

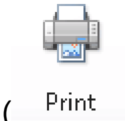
> You cannot edit text or other items on the form that are not highlighted in grey. For example, you cannot edit a patient's address on the SMART Form. Instead, edit the address in the Patient Maintenance window.

3. Click **Save** ( ), or on your keyboard, press <**Ctrl**><**S**>. The EMR saves the completed SMART Form in the **Documents** tab of the patient's Medical Summary.

4. To print or fax the form:

   a) On the Microsoft Word menu, click **File** > **Print**. Microsoft Word displays the print properties window.

   b) In the printer drop-down list, click the printer or fax machine you want.

c) Click **Print** (

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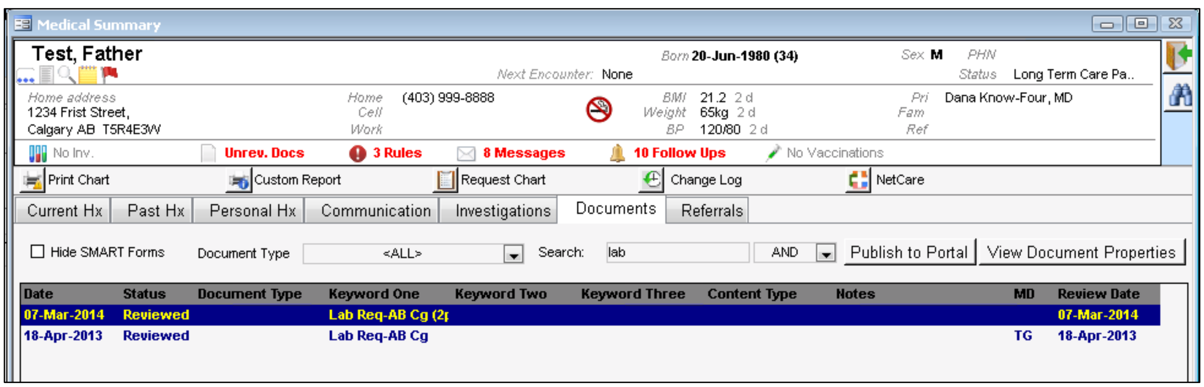
Viewing, printing, and faxing saved SMART forms

After you complete and save a SMART Form, the EMR saves the SMART Form in the Documents tab of the patient's medical summary. You can reference or re-print the form as needed.

To view and print a previously completed SMART Form for a patient:

1. Open the patient's Medical Summary, and then click the **Documents** tab. The EMR displays all of the patient's documents and SMART Forms.
2. In the **Search** field, enter a word that you know is present in the SMART Form's name, (for example, "**lab**"). The EMR filters the list to display only documents and SMART Forms that contain the search term.



3. In the filtered list of documents, double-click the form you want. The EMR opens the SMART Form in Microsoft Word.

At this point, you can add to or edit information in the SMART form if you are re-printing it.

CAUTION: Any edits you make are not saved when the form is closed.

4. To print the SMART form:

a) On the Microsoft Windows menu, click **File** > **Print**. Microsoft Word displays the print properties window.

b) In the printer drop-down list, click the print or fax machine you want.

c) Click **Print** (

).

SMART Form Favourites

Wolf EMR contains hundreds of SMART Forms you can choose from. With so many forms, it can be difficult to find the form you want. If you want to quickly find SMART forms you access often, you can designate certain SMART forms as favourites.

Favourite SMART Forms display at the top of your SMART Forms list. You can also open favourite SMART Forms using the **Favourite Requisition** and **Favourite Order Set** options on the SMART Menu.

Designating your favourite SMART forms

You can designate SMART forms as favourites either from the Maintenance tab, or from the Send to SMART form window.

Only users with administrative authority in Wolf EMR can add SMART forms to the favourites list of all clinic users.

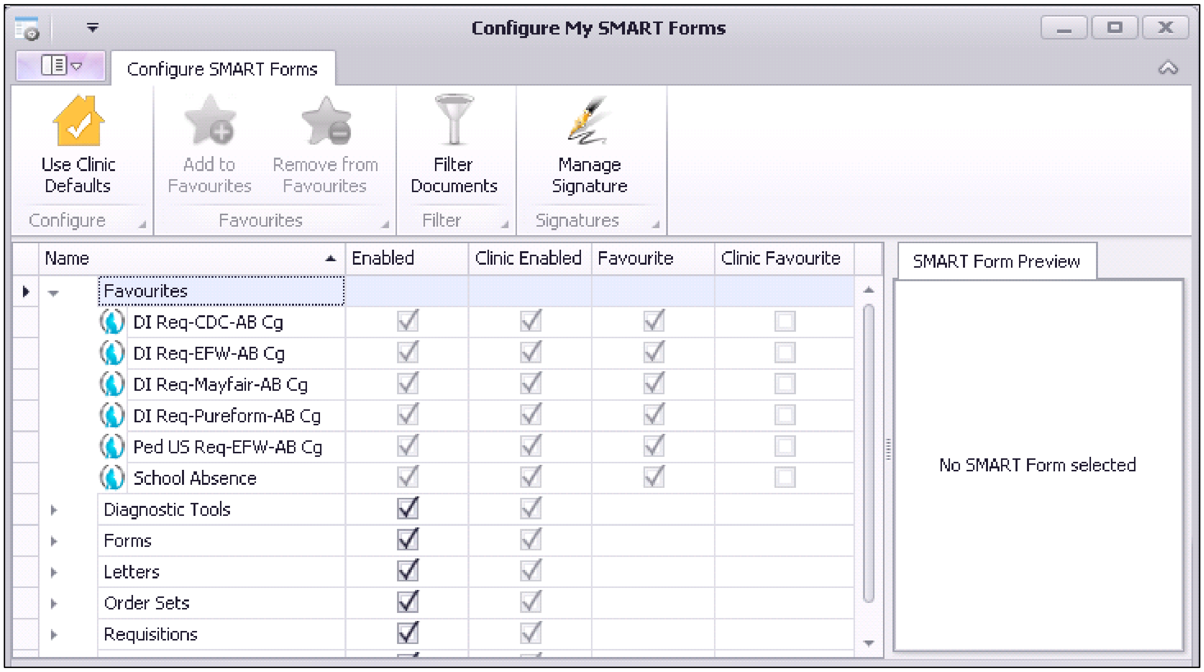
If you are in a patient's record with the Send to SMART Form window open, to designate a SMART form as a favourite:

1. In the list of SMART forms, click the form you want.
2. Click **Add to Favourites** ( ).

If you do not have a patient's record open, to designate a SMART form as a favourite:

1. On the Wolf EMR Launch Page, click the **Maintenance** tab.
2. On the Maintenance toolbar, click one of the following options:

   - **Configure My SMART Forms** ( ): To add SMART forms to your personal favourites list. The EMR displays the Configure My SMART Forms window.
   - **Configure Clinic SMART Forms** ( ): To add SMART forms to the favourites list of all users. The EMR displays the Configure Clinic SMART Forms window.

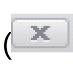


3. In the list of SMART forms, click the form you want.
4. If your list of forms is extensive and you can't find the form you want:

   a) Click **Filter Documents** (). The EMR displays a **Filter** field above your SMART form list.

   b) In the **Filter** field, enter a search term. (For example, "MRI".) The EMR filters the SMART form list to display only SMART forms containing your search term.

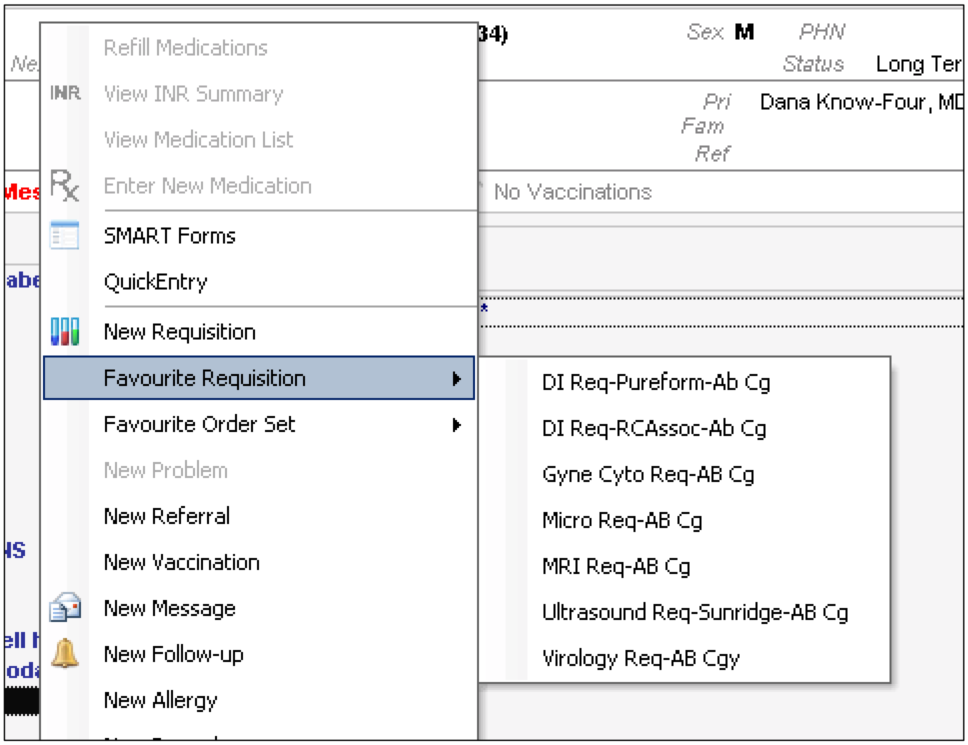
   c) In the filtered SMART forms list, click the form you want.

5. Click **Add to Favourites** ().
6. When you finish defining favourite SMART forms, click **Close** ().

Using favourite SMART forms

To use a favourite SMART form:

1. On any window related to the patient (including a patient's Medical Summary, SOAP form, Consult Letter Examination form, or Patient tab), right-click. The EMR displays the SMART Menu.
2. On the SMART Menu, perform one of the following actions:
   - To open a favourite requisition form, hover your cursor over **Favourite Requisition**. The EMR displays a list of your Favourite SMART forms categorized as requisition forms.



- To open a favourite order set, hover your cursor over **Favourite Order Set**s. The EMR displays a list of your Favourite SMART forms categorized as order sets.

> An order sets is a customized copy of a SMART form with certain check-boxes and text fields pre-populated. For more information on order sets, see “Order sets” on page 72.

- To open a favourite SMART form that is not categorized as a requisition form or an order set, click **SMART Forms**. The EMR opens the Send to SMART Form window, with your favourite SMART forms displayed at the top of the SMART form list

3. Click the form you want. The EMR opens the form in Microsoft Word.
4. Complete and print the form. See “Completing SMART forms for patients” on page 10.

Removing SMART forms from your favourites list

If your clinic has clinic-wide SMART form favourites that you do not use, you can remove the SMART forms from your favourites list without affecting the favourites list of other users.

If your clinic has clinic-wide SMART form favourites that all users do not use anymore, if you have administrative authority, you can remove these SMART forms from the favourites list of all clinic members.

Only users with administrative authority in Wolf EMR can remove SMART forms from the favourites list of all clinic users.

To remove a SMART Form from your favourites list:

1. On the Wolf EMR Launch Page, click the **Maintenance** tab.
2. Click one of the following options:
   - **Configure My SMART Forms** ( ): To remove SMART forms from your personal favourites list. The EMR displays the Configure My SMART Forms window, with a list of available SMART Forms displayed in the left column.
   - **Configure Clinic SMART Forms** ( ): To remove SMART forms from the favourites list of all users. The EMR displays the Configure Clinic SMART Forms window.
3. In the SMART Forms list, expand the **Favourites** category.
4. If your list of favourite forms is extensive and you can't find the form you want:
   a) Click **Filter Documents** ( ). The EMR displays a **Filter** field.
   b) In the **Filter** field, enter a search term. (For example, "**MRI**".) The EMR filters the SMART Form list to display only SMART Forms containing your search term.
5. On the SMART Forms list, click the form you want to delete.
6. Click **Remove from Favourites** ( ). The EMR removes the SMART Form from the favourites list.
7. When you are finished removing favourite SMART Forms, click **Close** ( ).

If you remove a Clinic Favourite from your favourites list, the SMART Form still displays on the favourites list of other users in the clinic.

Removing SMART forms

If you want to remove a SMART form or a complete category of SMART forms from your list of SMART forms, you can disable the form(s). Once disabled, the form(s) no longer display on your list, however other clinic users can still access the form(s). Users with administrative authority can disable a form for all clinic users.

To remove a SMART form from your list:

1. Complete one of the following actions:

    - If you are in a patient's record with the Send to SMART Form window open, at the top of the window, click the **Configure SMART Forms tab**. The EMR displays the Configure My SMART Forms window.
    - If you do not have a patient's record open, on the Wolf EMR Launch page, click the **Maintenance** tab, and then click one of the following options:
        - **Configure My SMART Forms** ( ): To remove SMART forms from your personal list. The EMR displays the Configure My SMART Forms window, with a list of available SMART Forms displayed in the left column.
        - **Configure Clinic SMART Forms** ( ): To remove SMART forms from the list of all users. The EMR displays the Configure Clinic SMART Forms window.

2. Find the form or category of forms you want to disable. If you cannot find the form you want, filter the list. See step 4 in Designating your favourite SMART forms on page 13.
3. Beside the form, or category of forms you want to disable, clear the **Enabled** check box.

Importing SMART forms

If you receive a SMART form file from another clinic or a colleague, you can import the form into your clinic's system and use it in Wolf EMR.

> You can share your custom SMART forms with other Wolf EMR users using the Community Portal Chatter feature.

To import a form, you copy the SMART form file from your local computer into the User Templates folder (**W:/Wolfdata/templates/**) on the remote computer hosting Wolf EMR (data center).

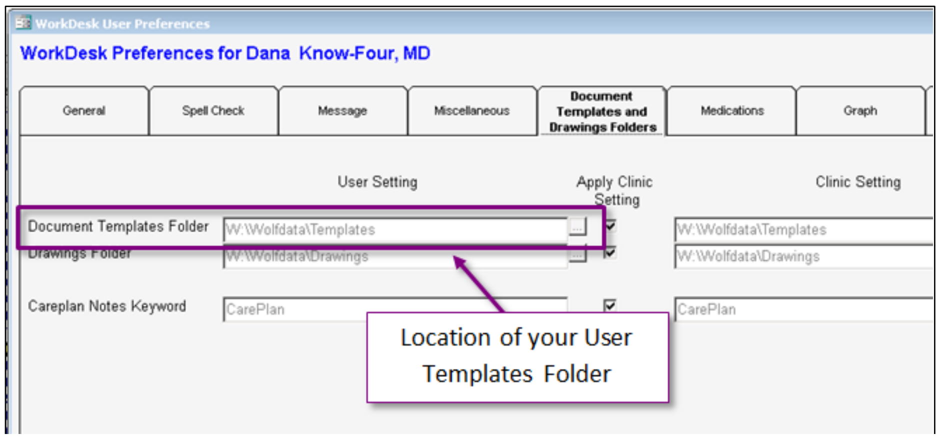
To import a SMART form:

1. Navigate to the User Templates folder on the data center:

Unless you have had a custom User Templates folder set up, the folder location should be **W:\Wolfdata\Templates**.

To verify the location of the User Templates folder:

1. On the WorkDesk menu, click **Configure** > **Configure Workdesk**. The EMR displays the WorkDesk User Preferences window.
2. Click the **Document Templates and Drawings Folders** tab.
3. In the **User Setting** area of the window, note the pathway displayed in the **Document Templates Folder** field.



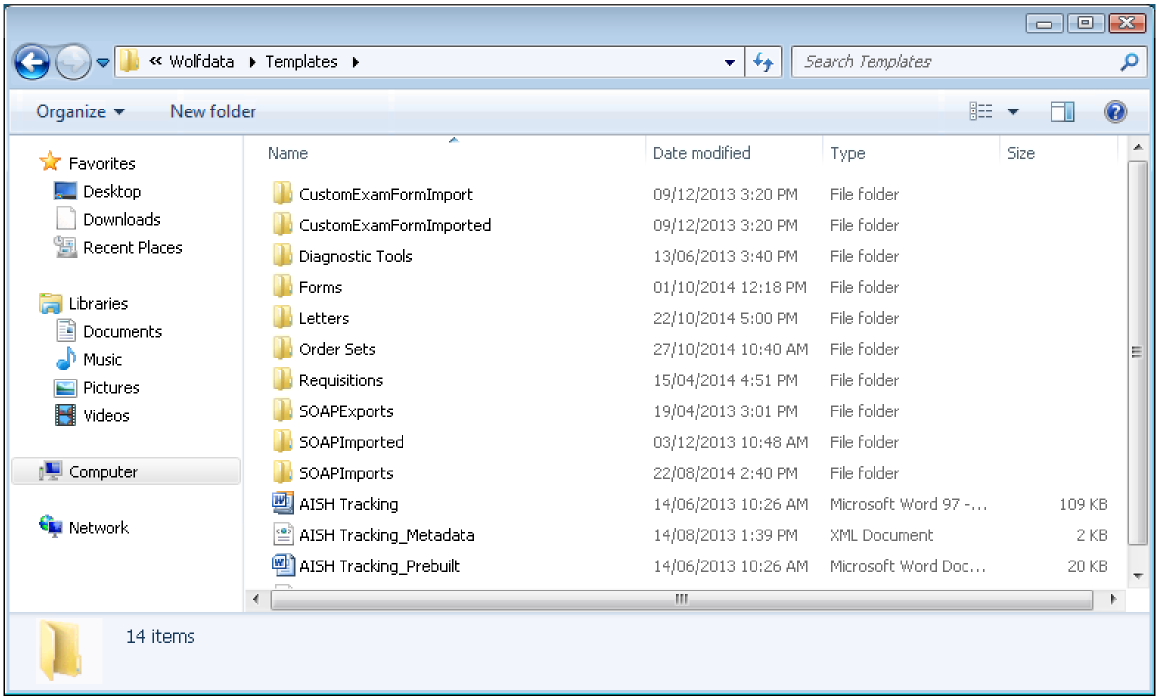
c) On the desktop of your remote computer, click **Start** (). The EMR displays the Windows Start Menu.

d) Click **Computer**.

e) In the Microsoft Explorer window, under **Network Location**, double-click **W:**.

f) Double-click **Wolfdata** >**Templates**. The Templates folder contains a folder for each SMART form category (for example, Letters, Requisitions).

g) Double-click the appropriate folder.



2. On your local computer, copy the Microsoft Word 97-2003 template file for the SMART form. Right-click the SMART form file, and then click **Copy** or, on your keyboard, press <**Ctrl**><**C**>.

Each form has several file types. Ensure that you copy the **Microsoft Word 97-2003** Template () file.

3. In the category folder on your remote desktop, right-click, and then click **Paste**. The SMART form is now available to use in Wolf EMR.
4. Optionally, rename the SMART form file name.

Creating SMART forms

Starting SMART Forms

To start a new SMART Form, you open Microsoft Word and then save the document as a template in your clinic's template folder.

If you have already created a document in Microsoft Word, and want to "convert" it into a SMART form, you can save the Word Document in your clinic's template folder as a Microsoft Word 97-2003 Template. You can then program the form to pull patient data (see "Programming SMART forms to populate data automatically" on page 59), or add user interface items such as check boxes and text fields (see "Adding user interface elements to restricted forms" on page 49).

Starting new SMART forms

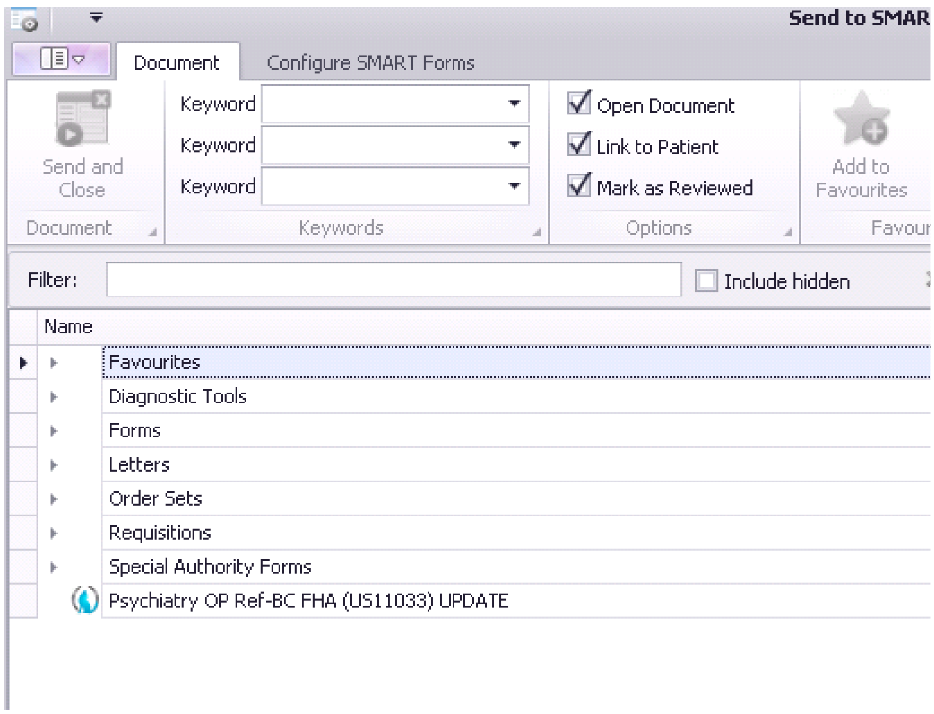
To start a new SMART form:

1. On your Remote Desktop (that hosts Wolf EMR), in the bottom toolbar, click **Start** ( ).
2. Click **All Programs** > **Microsoft Office** > **Microsoft Word 2010**. Microsoft Word opens, with a blank document displayed.
3. On the Microsoft Word menu, click **File** > **Save As** ( ). Microsoft Word displays the Save As window.
4. Search for and select the location of your clinic SMART forms:
   a) In the left pane, click **Computer** ( ).
   b) Under **Network Location**, double-click **W:**.
   c) Double-click **Wolfdata** >**Templates**. The Templates folder contains a folder for each SMART form category (for example, Letters, Requisitions).
   d) Double-click the appropriate folder.

If the category folder you want is not available, you can create the folder now:

1. In the Templates folder window, right-click.
2. Click **New** > **Folder**. Windows creates a folder called "New Folder".
3. Rename the folder to the category name. For example "**Letters**".

Note: Category folders are the expandable categories you can choose from when you select a SMART form for a patient.



5. In the **File name** field, enter a descriptive name for the SMART form.
6. In the **Save as type** drop-down list, click **Word 97-2003 Template**.
7. Click **Save**.

Converting a Microsoft Word document into a SMART form

If you have already created a document in Microsoft Word, you can convert the document into a SMART form that can be used in Wolf EMR.

To convert a Microsoft Word document into a SMART form:

1. Save the Microsoft Word document as a Word 97-2003 Template file:
   a) Open the document in Microsoft Word.
   b) At the top of the Microsoft Word window, click **File** > **Save As**.

c) In the **Save as type** drop-down list, click **Word 97-2003 Template**.

d) Click **Save**.

2. Import the Word 97-2003 Template file into the User Templates folder on the remote desktop hosting Wolf EMR. See “Importing SMART forms” on page 16.

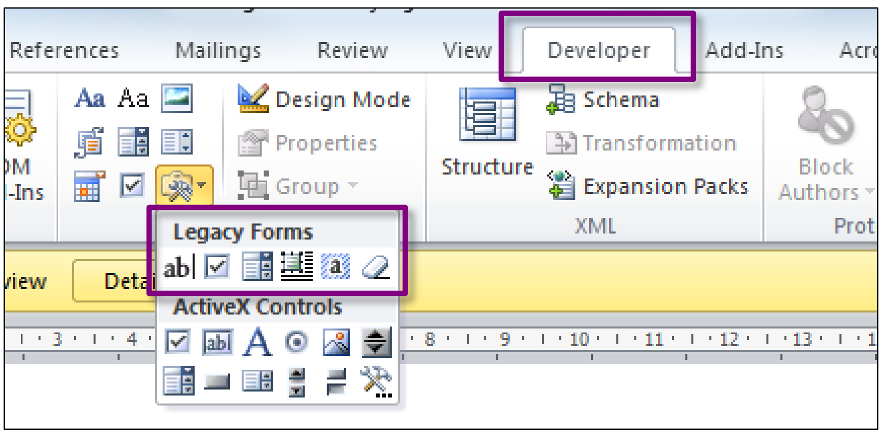
3. Modify the SMART form, and add items as needed. See “Creating SMART forms for letters” on page 27, or “Creating SMART forms for requisition forms and other entry forms” on page 38.

Configuring Microsoft Word for SMART forms development

Before you create a SMART form, activate the Microsoft Word **Developer** tab. The **Developer** tab enables you to:

- Add check boxes, text fields, and drop-down lists
- Add editing restrictions

Once activated, the **Developer** tab displays next to the **View** tab at the top of the Microsoft Word window.



You must also set Microsoft Word to show bookmarks. Bookmarks are characters that are replaced with patient data when used in a patient’s chart. For more information on bookmarks, see “Programming SMART forms to populate data automatically” on page 59.

Activating the Microsoft Word Developer tab

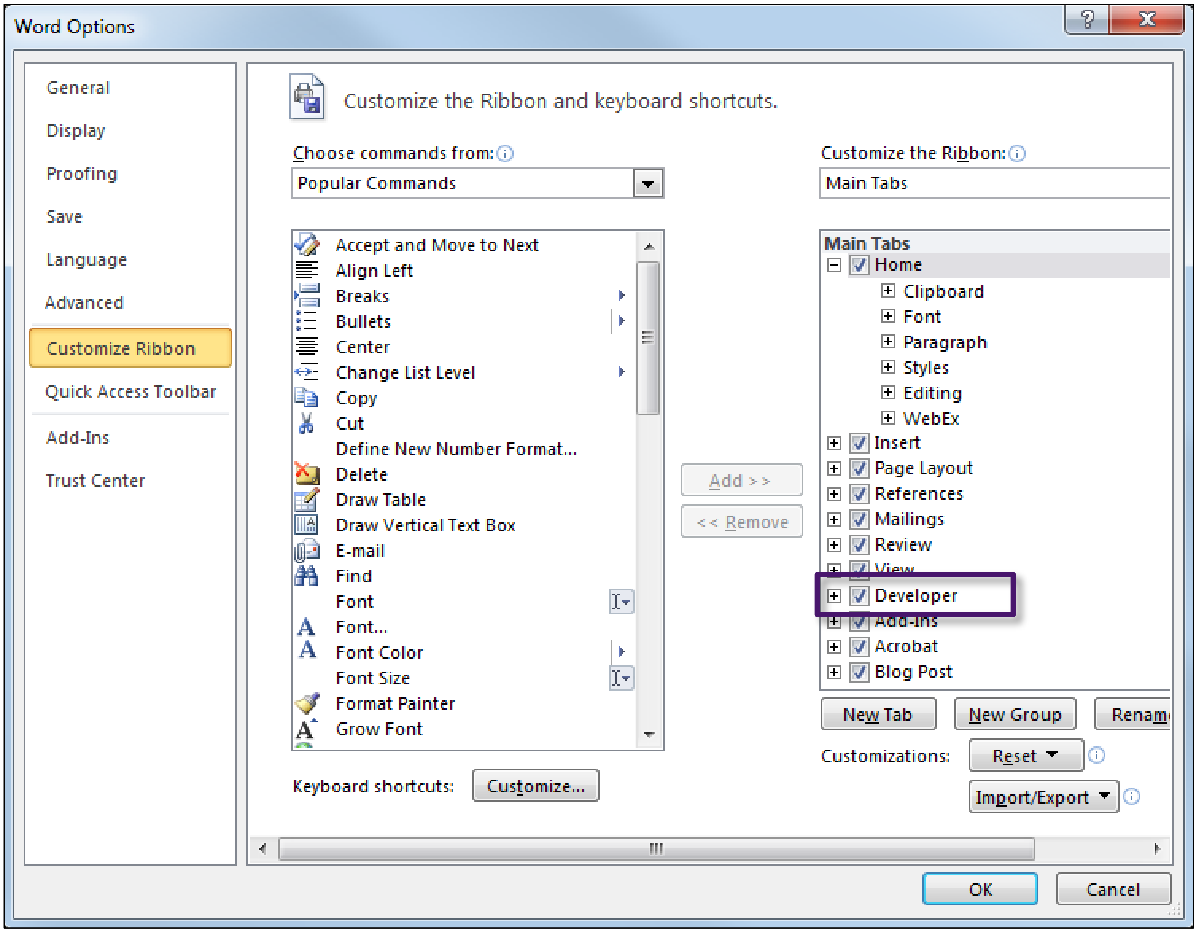
To activate the Microsoft Word Developer tab:

1. Open Microsoft Word if you do not have it open already:

a) On the Remote Desktop that hosts Wolf EMR (data center), in the bottom toolbar, click **Start** ().

b) Click **All Programs** > **Microsoft Office** > **Microsoft Word 2010**. Microsoft Word opens, with a blank document displayed.

2. On the Microsoft Word menu, click **File** > **Options**. Word displays the Word Options window.
3. In the left pane, click **Customize Ribbon**.
4. In the **Customize the Ribbon** area, under **Main Tabs**, select the **Developer** check box.



5. Click **OK**.

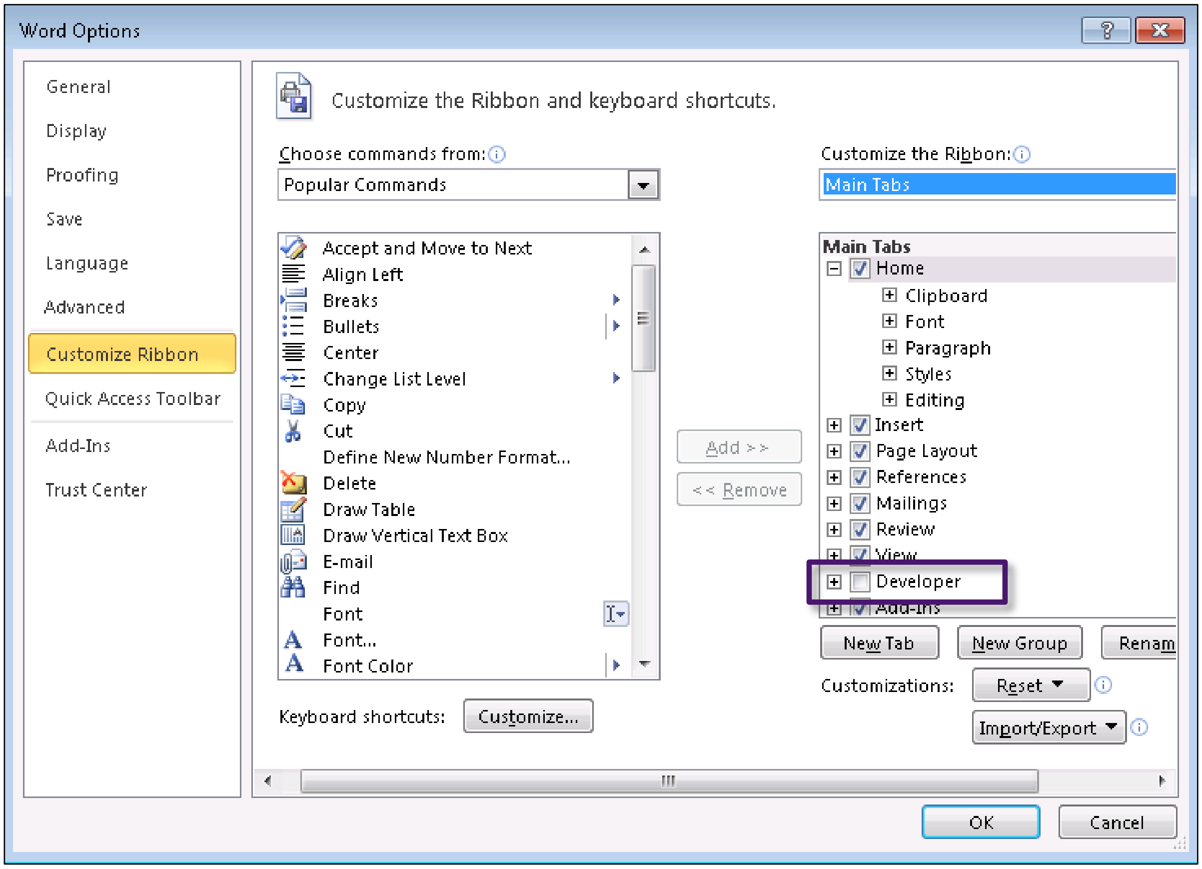
Deactivating the Microsoft Word Developer tab

After you are finished creating your SMART form, you can deactivate the Microsoft Word Developer tab.

To deactivate the Microsoft Word Developer tab:

1. Open Microsoft Word:
   a) On the Remote Desktop that hosts Wolf EMR (data center), in the bottom toolbar, click **Start** ().
   b) Click **All Programs** > **Microsoft Office** > **Microsoft Word 2010**. Microsoft Word opens, with a blank document displayed.

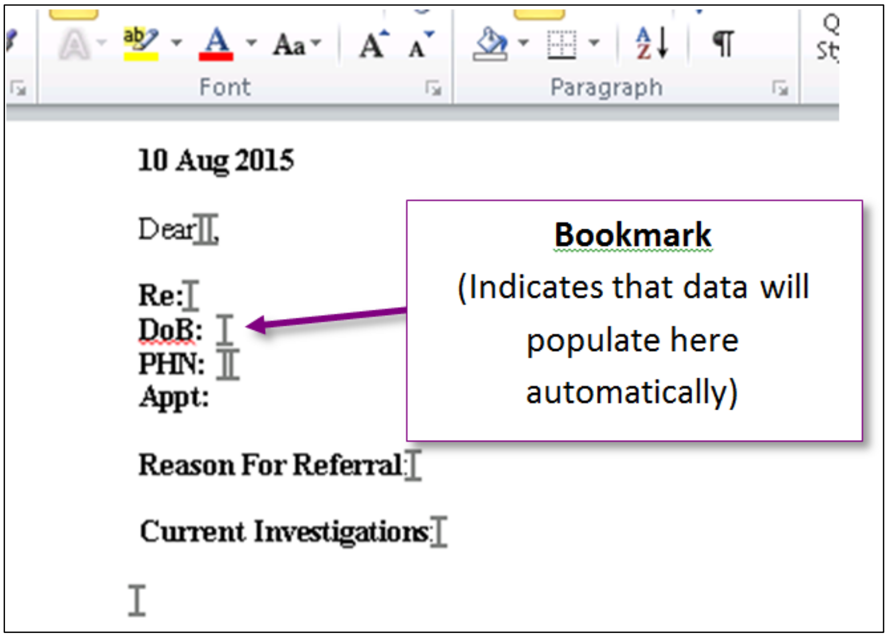
2. On the Microsoft Word menu, click **File** > **Options**. Word displays the Word Options window.
3. In the left pane, click **Customize Ribbon**.
4. In the **Customize the Ribbon** area, under **Main Tabs**, clear the **Developer** check box.



5. Click **OK**.

Setting up Microsoft Word to show bookmarks

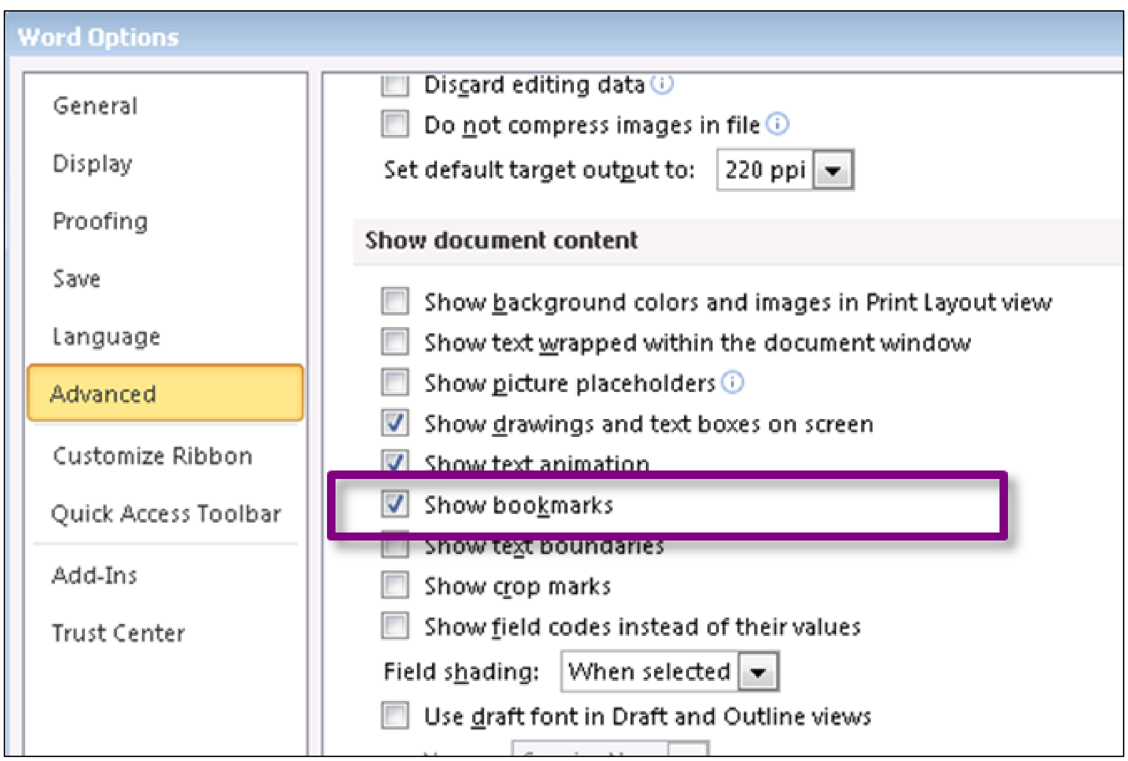
If you add bookmarks to SMART forms, by default you cannot see where bookmarks are inserted. To see where bookmarks are inserted, you can configure Microsoft Word to show bookmarks. Microsoft Word then displays bookmarks as I characters. You should always set Microsoft Word to display bookmarks or you risk mistakenly deleting or overwriting them.



See “Inserting bookmarks” on page 60.

To configure Microsoft Word to show bookmarks:

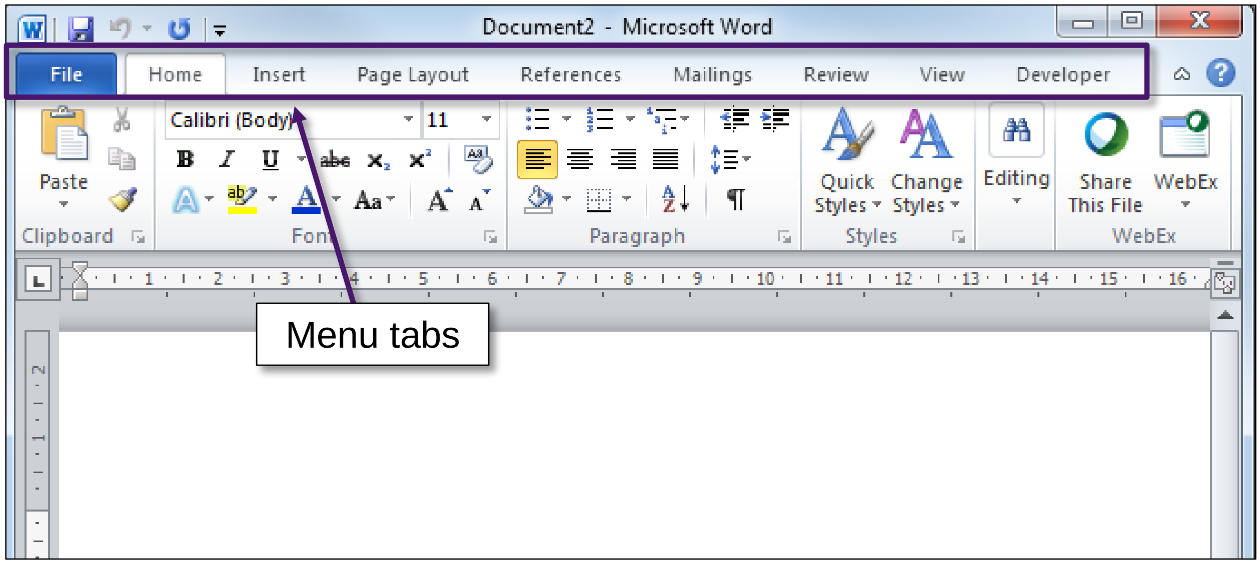
1. On the Microsoft Word menu, click **File** > **Options**. Microsoft Word displays the Word Options window.
2. Click **Advanced**.
3. In the **Show document content** area, select the **Show bookmarks** check box.



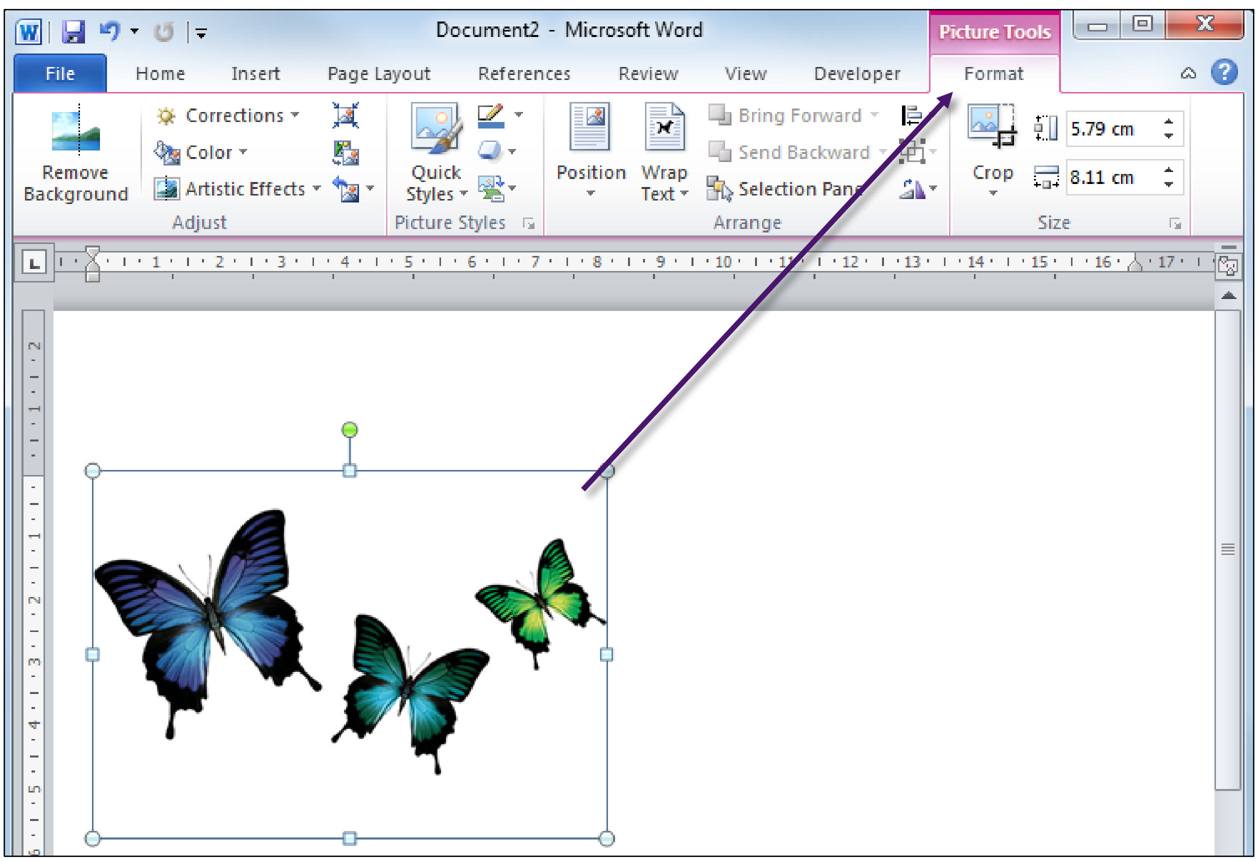
4. Click **OK**.

Tips for navigating Microsoft Word

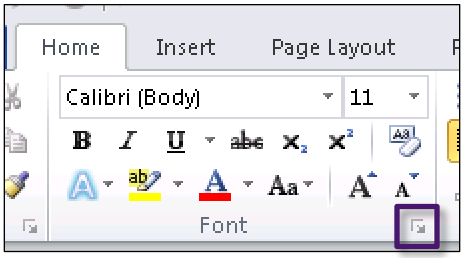
Microsoft Word contains a multitude of options for adding content and performing actions on documents. To find the content item or action you want, use the Microsoft Word menu tabs. Click each tab to view the associated Quick Action Toolbar below.



If you insert an item on a document that has configurable properties, a new tab may appear. Any tools you use or actions you perform from the new tab are specific to the item you inserted.



Tools and options in the Quick Action Toolbar are arranged in groups. To view more detailed options for a group, click the expand icon on the bottom right corner of the group.



For more information on how to use specific tools, access **Word Help**. On the top right of the Microsoft Word window, click .

Creating SMART forms for letters

The process for creating letter SMART forms is simpler than creating SMART forms for requisition forms and other entry forms (where users have to enter data in designated areas). You can usually leave letter SMART forms unrestricted, enabling users to add to or modify text in all areas of the letter. Letter SMART forms also require less complicated formatting. You simply write a letter, and indicate where patient, clinic, practitioner, and addressee data is to populate automatically.

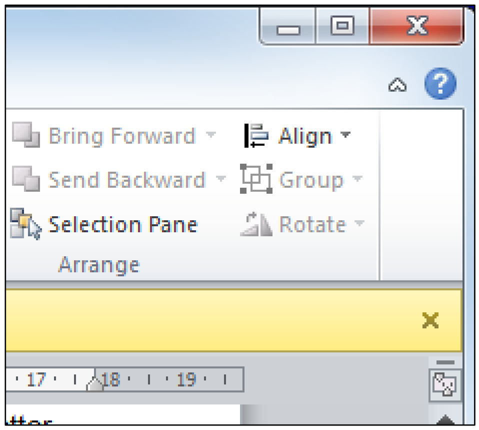
Letters typically contain four main sections:

- Letterhead
- Addressee information and greeting
- Letter body
- Closing

The following sections cover processes and tips for creating each section of your letter.

Learning more on Microsoft Word tools:

For additional information on how to use tools in Microsoft Word to format your letter, you can ask a question and get help using **Word Help**. To access Microsoft Word Help, on the top right of the Microsoft Word window, click the **Microsoft Word Help** ( ) icon.

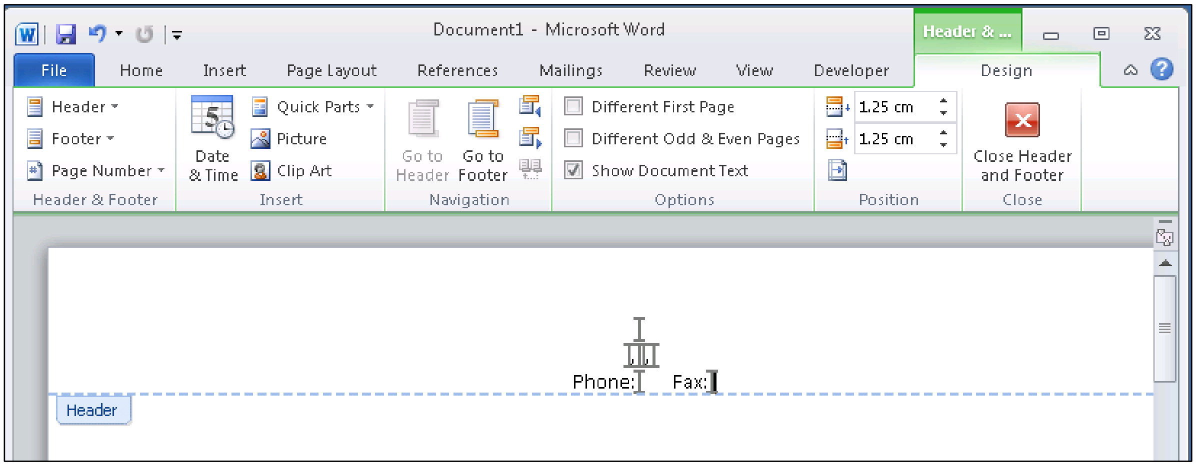


Adding a letterhead

To add a letterhead:

1. Start a new SMART form. See "Starting SMART Forms" on page 20.
2. Perform one of the following actions:
   - If you want your letterhead to display on all pages of the printed letter:
     a) At the top of the window, click **Insert** and then, in the **Header & Footer** area, click **Header** ( ). Word displays a list of header options.
     b) Click **Edit Header**. Word displays an editable area at the top of the page.
     c) In the editable area, place your cursor where you want your letterhead to start.
   - If you want your letterhead to display on only the first page of the printed letter, within the regular margins on the first page of the letter, place your cursor where you want your letterhead to start.
3. If you want to center your letterhead, at the top of the window, click the **Home** tab and then, in the **Paragraph** area, click **Center text** ( ). Your cursor moves to the centre of the page.

4. Enter any text you want to display in the letterhead. If you want your clinic name, address, and contact information to populate automatically, add bookmarks where needed. See "Inserting bookmarks" on page 60.



Common header bookmarks

You can find the bookmarks for your clinic name, address, and contact information in the Bookmarks topic of the Wolf online Help, under the **Clinic Address** bookmark category.

Categories of bookmarks

- ⊞General
- ⊞Building
- ⊟ Clinic Address

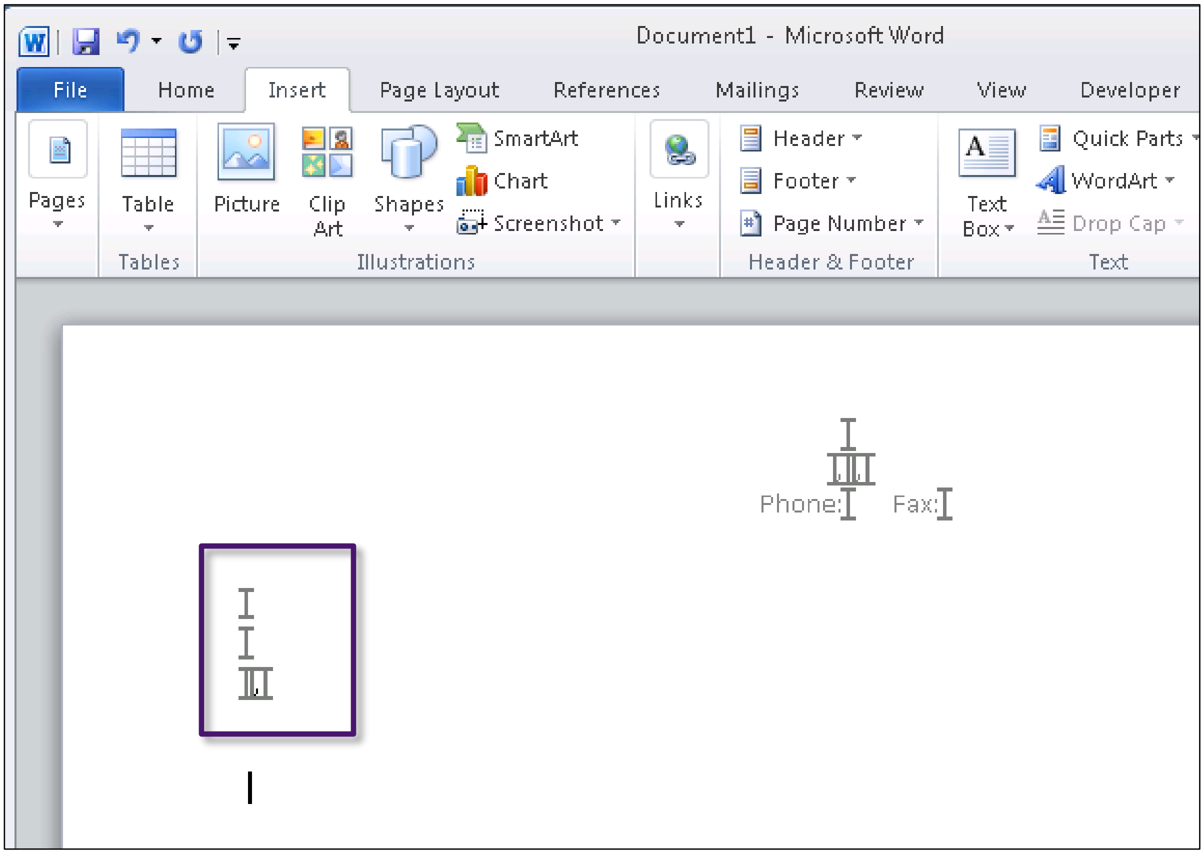
Bookmark	Description
ClinicName	Inserts the Clinic Name
Street1	Inserts first line of the clinic's Address
Street2	Inserts second line of the clinic's Address
ClinicCity	Inserts City/Town where clinic is located
ProvinceState	Inserts Province/State where clinic is locatec
PostalZip	Inserts Postal Code of the clinic
PhOffice	Inserts Phone number of the clinic
PhFax	Inserts Fax number of the clinic

5. Optionally, add your clinic's logo to the header. See "Adding pictures" on page 48.
6. When you finish, if you have the Header edit area open, click **Close Header and Footer** ().

Adding addressee information and letter greetings

To enter addressee information and a letter greeting:

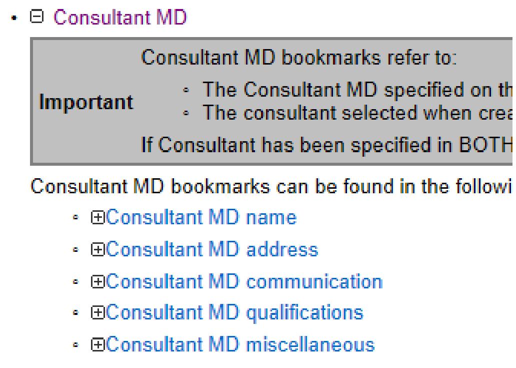
1. Place your cursor where you want the addressee information to populate.
2. To have the addressee's name, address, and contact information populate automatically, insert bookmarks for each item you want to pull. See "Inserting bookmarks" on page 60.



Add spaces, commas, and new lines between the bookmarks as needed.

If the letter addressee is a consultant…

In the Bookmark Wolf online Help Topic, you can find bookmarks for consultant addressee information by expanding the **Consultant MD** category, and then expanding the subcategory you want.

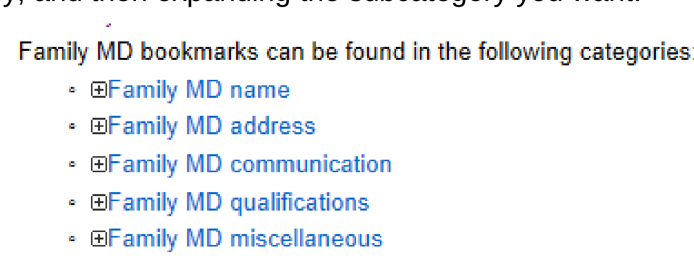


Note: For the EMR to know which consultant to pull information for, the consultant must:

- Be entered in Patient Maintenance, in the **Name/Addr/Phone** tab, in the **Consultant Physician** field.
- Or, if the letter is a referral letter, be the selected consultant for the referral.

If the addressee is patient family practitioner…

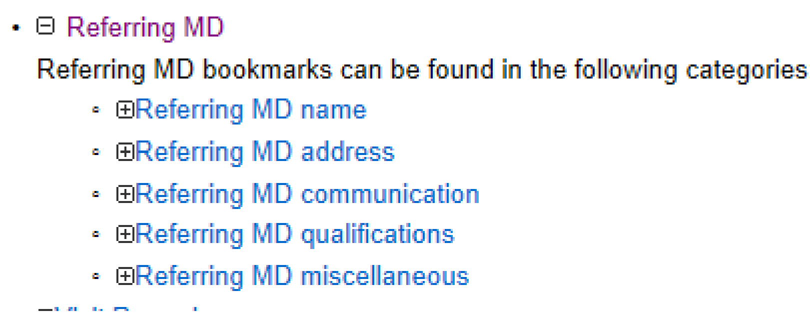
In the Bookmark Wolf online Help Topic, you can find bookmarks for the family doctor addressee information by expanding the **Family MD** category, and then expanding the subcategory you want.



Note: For the EMR to know which doctor to pull information for, the patient's family doctor must be entered in Patient Maintenance, in the **Name/Addr/Phone** tab, in the **Family Practice Phys** field.

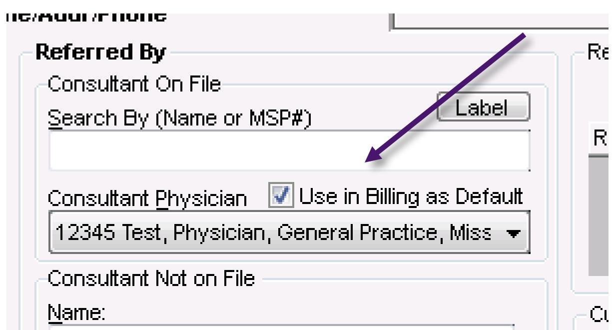
If the addressee is patient referring practitioner…

In the Bookmark Wolf online Help Topic, you can find bookmarks for the referring doctor addressee information by expanding the **Referring MD** category, and then expanding the subcategory you want.

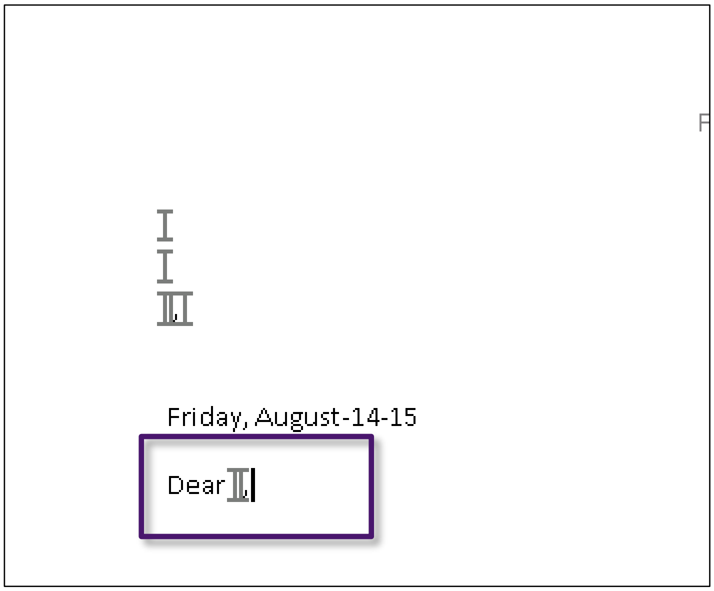


Note: For the EMR to know which doctor to pull information for:

1. The patient's referring doctor must be entered in Patient Maintenance, in the **Name/Addr/Phone** tab, EITHER in the **Family Practice Phys** field, or in the **Consultant Physician** field.
2. The **Use in Billing as Default** check box must also be selected beside the field where the referring practitioner is entered.



3. To enable users to insert CC'd addressees to the letter, below the addressee information insert bookmarks for CC consultant.
4. Optionally, insert the letter date below the addressee information. See "Adding form entry date" on page 64.
5. Below the addressee address information, enter a greeting (for example, "Dear"), and then insert MD name bookmark(s) for the consultant md, family md, or referring md. See step 2 for tips on finding the correct bookmarks.

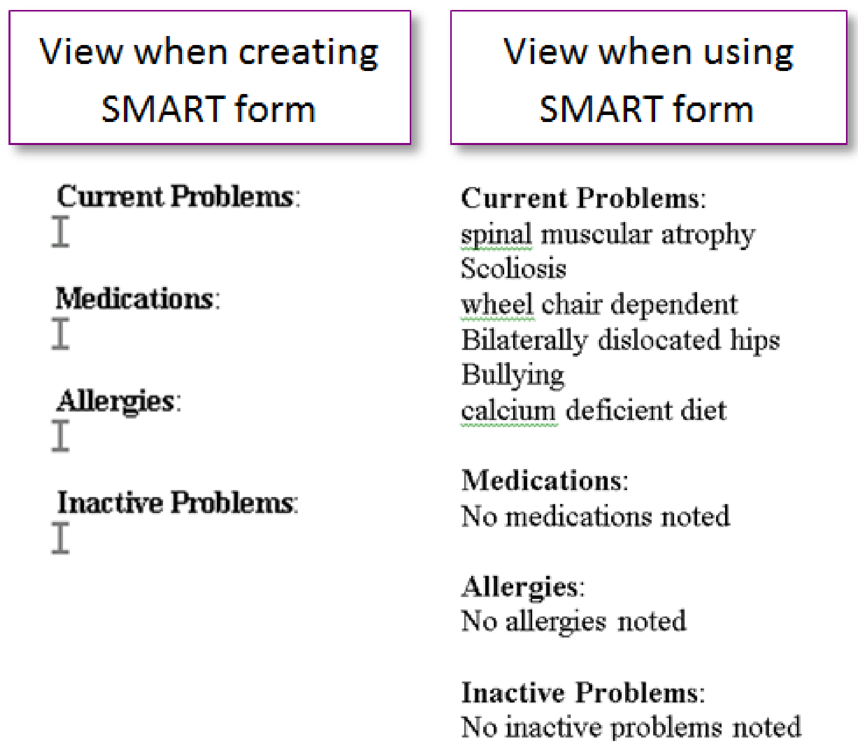


Creating a letter body

To create a letter body:

1. Place your cursor where you want the letter body to display.
2. Enter your letter body text. If you want patient or clinic information to populate anywhere within a sentence (for example, “Thank you for seeing this **8** year old **Female**.”), insert the appropriate bookmark. See “Inserting bookmarks” on page 60.
3. If you want the letter template user to add information to the middle or end of a sentence, leave a space, or insert a distinctive character as a “place holder” (for example, “thank you for seeing this patient regarding *** ”**).
4. If you want to populate all or part of the patient’s Medical Summary into the body of the letter:
   a) Enter a title for each area of the Medical Summary you want to display information for.
   b) Below each title, insert the bookmark for the corresponding Medical Summary item. See “Inserting bookmarks” on page 60.

When you use the SMART letter, Wolf EMR populates Medical Summary bookmarks as vertical lists. For this reason, insert Medical Summary bookmarks below their corresponding title (instead of beside the title). Also consider adding an extra line between each Medical Summary section for easier reading.



Creating letter closings

To add a letter closing:

1. Place your cursor where you want the closing statement to display.
2. Enter a closing statement (for example, “Regards,”).
3. To have the sending practitioner’s electronic signature populate the letter automatically, on the line below the closing statement, insert the bookmark for the sending practitioner’s eSignature. See “Adding electronic signatures” on page 48.
4. On the next line, insert bookmarks for the practitioner’s name, and optionally the practitioner’s Practitioner Number.

If you use the **MDName** bookmark:

- If the SMART form is used from the Physician WorkDesk, this bookmark inserts the name of the practitioner currently logged on.
- If the SMART form is used from the Front Office WorkDesk, this bookmark inserts the name of the patient's Primary Service Provider (as displayed in Patient Maintenance on the **Name/Addr/Phone** tab).

Setting a SMART form to be a default referral letter template

If you create a referral letter SMART form, you can set the SMART form to be the default letter template when you click **Send to SMART Form** ( ) on a referral.

You can make a SMART form the default letter template for all referrals, or you can make a SMART form the default letter template for when you refer to only specific consultants.

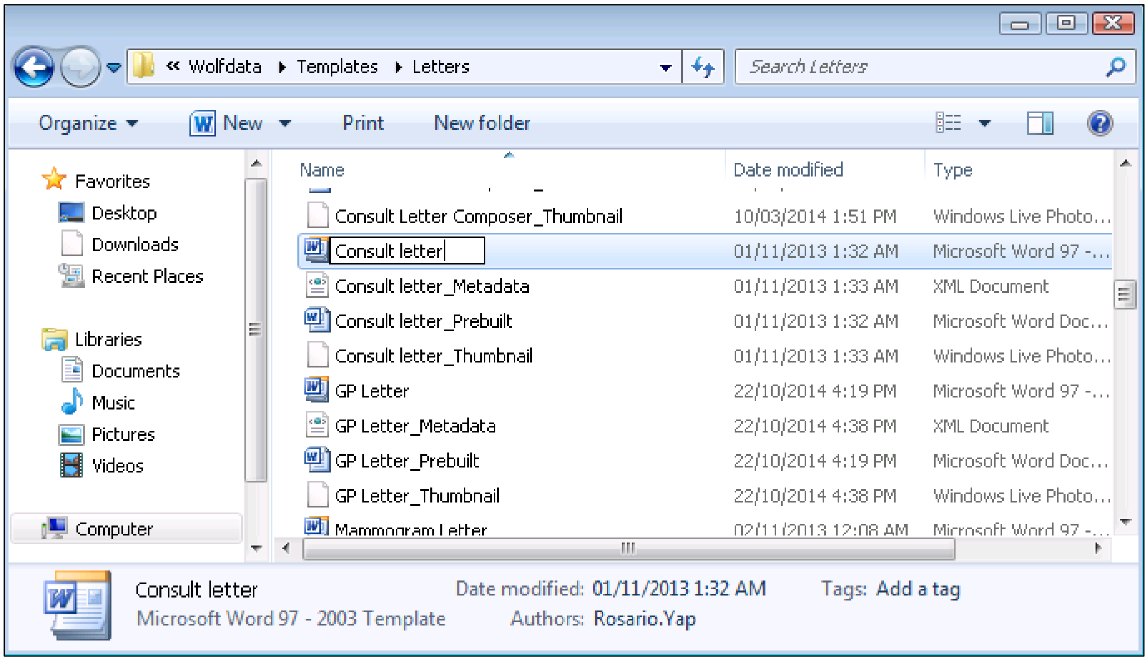
Setting a SMART form to be your clinic's default referral letter template

Wolf EMR comes with a standard SMART form referral letter template, called "Consult letter". If you make a customized referral letter template (for example, with your clinic's logo), you can override the standard referral letter template with your customized referral letter template.

CAUTION: If you over-ride the standard referral letter SMART form with a custom SMART form, the custom SMART form becomes the default for all clinic users.

To set a SMART form to be your clinic's default referral letter template:

1. Ensure the SMART form template file is saved in your user Templates folder, in the Letters folder. To open your Letters folder:
   a) On your remote desktop, click **Start** ( ).
   b) In the **Start** menu, click **Computer**. The Windows Explorer window opens.
   c) Under **Network Location**, double-click **W:**.
   d) Double-click **Wolfdata** >**Templates** > **Letters**.
2. Rename the SMART form to "Consult letter":
   a) Right click the Microsoft Word 97 – 2003 Template file for the SMART form.
   b) Click **Rename**.
   c) In the editable name field, enter **Consult letter**.



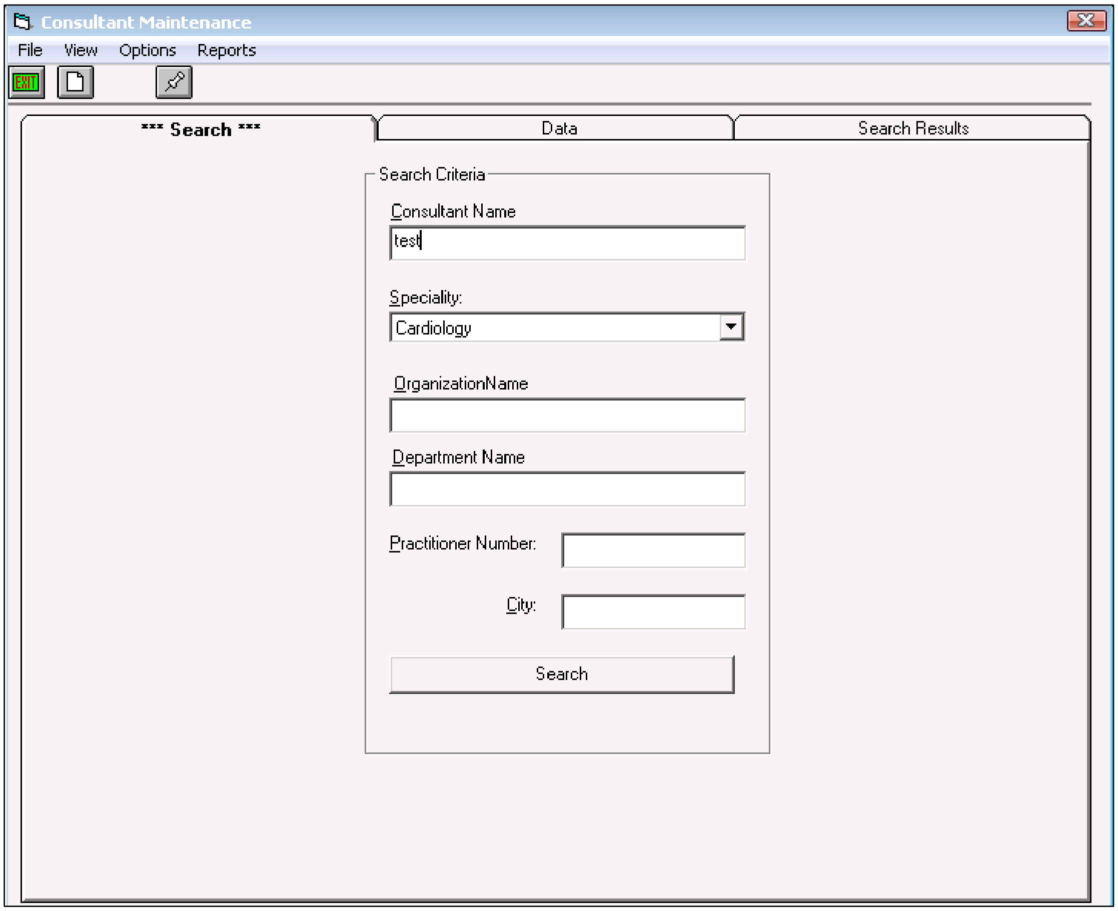
Setting a SMART form to be a default referral letter template for a specific consultant

If you make a referral letter SMART form that is specific to a certain consultant or specialty, you can set the referral letter template to override the standard Wolf EMR referral letter template when you refer only to selected consultants.

Only users with administrative authority can set a SMART form to be a default referral letter template for a specific consultant.

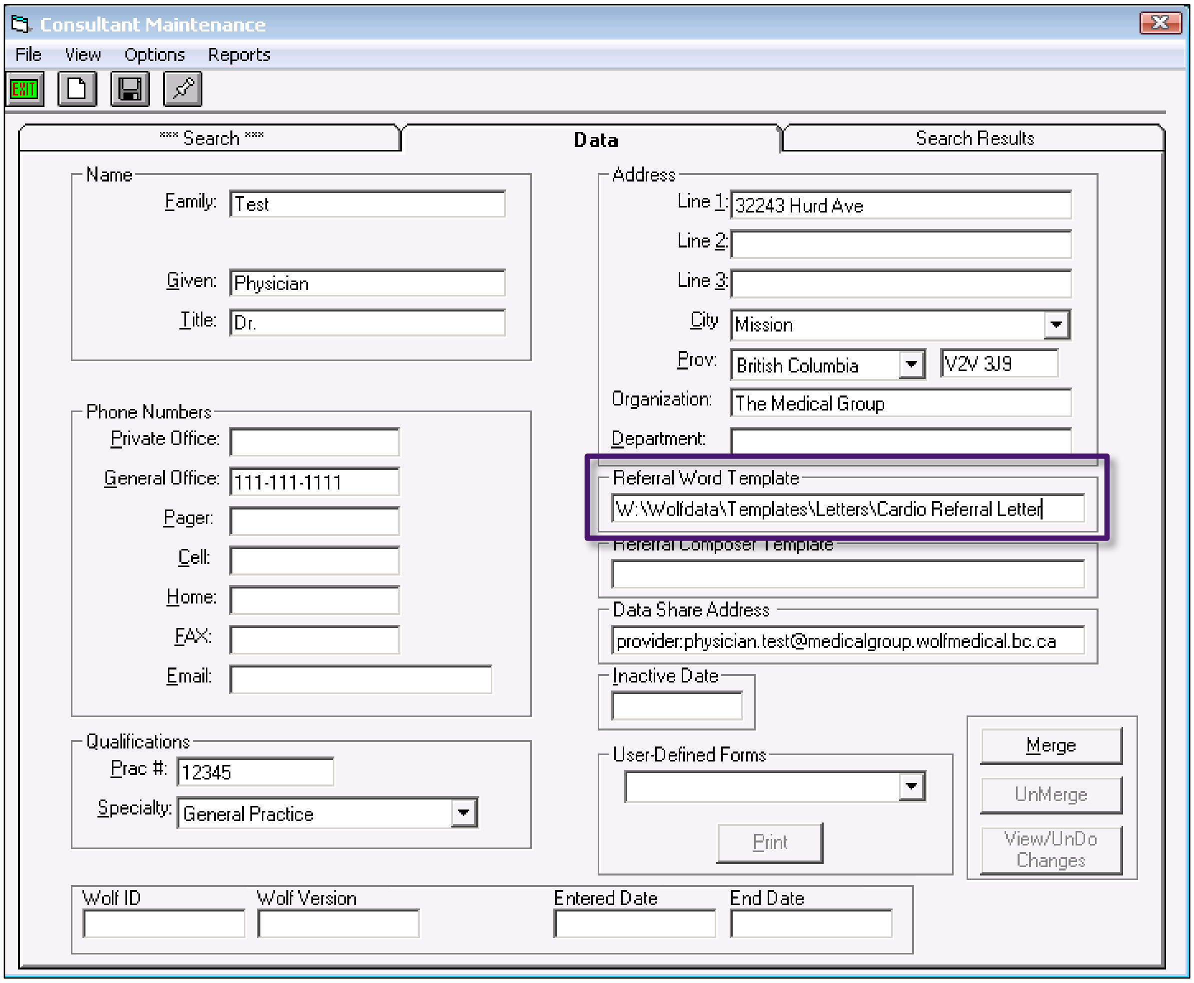
To set a SMART form to be a default referral letter template for a specific consultant:

1. On the Wolf EMR launch page, click **Configuration** ( ). Wolf EMR displays the Configuration window.
2. In the Configuration menu, click **View**, and then click **Physicians/Service Providers** > **External Consultants**. The EMR displays the Consultant Maintenance window.
3. Search for the consultant:
   a) In the **Search** tab, in the **Consultant Name** field, enter part or of the consultants first or last name.
   b) Optionally, in the **Specialty** drop-down list, click the consultant’s specialty.



c) Click **Search**. The EMR displays the **Search Results** tab with a list of matching consultants.

4. In the list of matching consultants, click the consultant's name. The EMR displays the **Data** tab with detailed information for the selected consultant.
5. In the **Referral Word Template** field, enter the location of the referral letter SMART form, followed by the name of the SMART form.



6. Click **Save** ().

Creating SMART forms for requisition forms and other entry forms

You can create fill-in only SMART forms, where users can input information only in designated text fields, check boxes, and drop-down lists. Users cannot edit the content of the form itself. Fill-in only SMART forms are most often created for electronic versions of standard forms (such as requisition forms and government forms). As with other SMART forms, fill-in only forms can be programmed to automatically pull in patient data using bookmarks, removing the drudgery of filling out forms manually.

You create most fill-in only forms using tables in Microsoft Word. In building forms using tables, you can format form content into organized columns and rows, and line up text and entry items.

SMART forms become fill-in only when you add editing restrictions to the form.

Using tables to format SMART forms

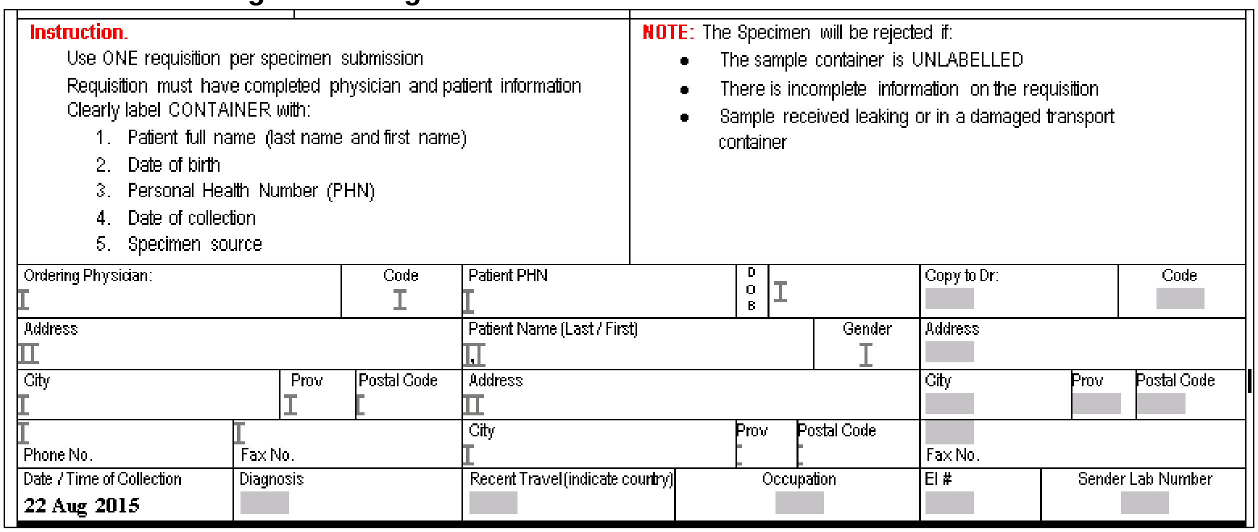
Many forms contain a variety of data that is separated into various organized columns and rows. Using Microsoft Word, the easiest way to create these forms is to build content within tables.

Tables enable you to:

- Line up groups of content
- Force inputted data to stay within defined regions

You can hide table borders where you don't want table lines to display, or modify border properties to highlight specific areas. You can also split or merge table cells, and adjust individual cell widths.

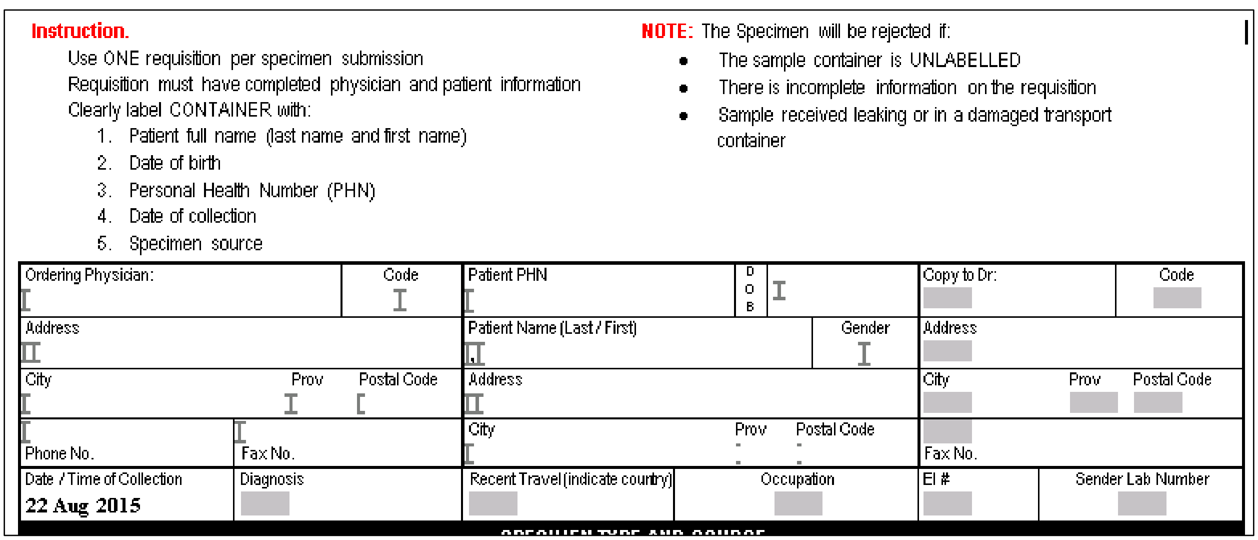
SMART form being built using a table:


Instruction.
Use ONE requisition per specimen submission
Requisition must have completed physician and patient information
Clearly label CONTAINER with:
1. Patient full name (last name and first name)
2. Date of birth
3. Personal Health Number (PHN)
4. Date of collection
5. Specimen source

NOTE: The Specimen will be rejected if:
- The sample container is UNLABELLED
- There is incomplete information on the requisition
- Sample received leaking or in a damaged transport container

Ordering Physician:	Code	Patient PHN	DOB			Copy to Dr:	Code
Address		Patient Name (Last / First)			Gender	Address	
City	Prov	Postal Code	Address			City	Prov / Postal Code
Phone No.	Fax No.	City	Prov	Postal Code		Fax No.	
Date / Time of Collection 22 Aug 2015	Diagnosis	Recent Travel (indicate country)	Occupation			EI #	Sender Lab Number

SMART form after table borders have been hidden and modified:


Instruction.
Use ONE requisition per specimen submission
Requisition must have completed physician and patient information
Clearly label CONTAINER with:
1. Patient full name (last name and first name)
2. Date of birth
3. Personal Health Number (PHN)
4. Date of collection
5. Specimen source

NOTE: The Specimen will be rejected if:
- The sample container is UNLABELLED
- There is incomplete information on the requisition
- Sample received leaking or in a damaged transport container

Ordering Physician:	Code	Patient PHN	DOB			Copy to Dr:	Code
Address		Patient Name (Last / First)			Gender	Address	
City	Prov	Postal Code	Address			City	Prov / Postal Code
Phone No.	Fax No.	City	Prov	Postal Code		Fax No.	
Date / Time of Collection 22 Aug 2015	Diagnosis	Recent Travel (indicate country)	Occupation			EI #	Sender Lab Number

Inserting tables

To insert a table:

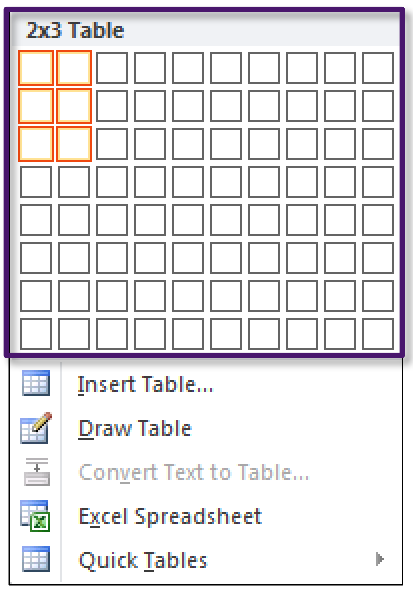
1. Start a new SMART form. See "Starting SMART Forms" on page 20.
2. If the form you are creating is wide, and you want more room on the page for content, narrow the form margins:

a) At the top of the window, click the **Page Layout** tab.

b) In the **Page Setup** area, click **Margins** ().

c) In the list of margin options, click **Narrow** ().

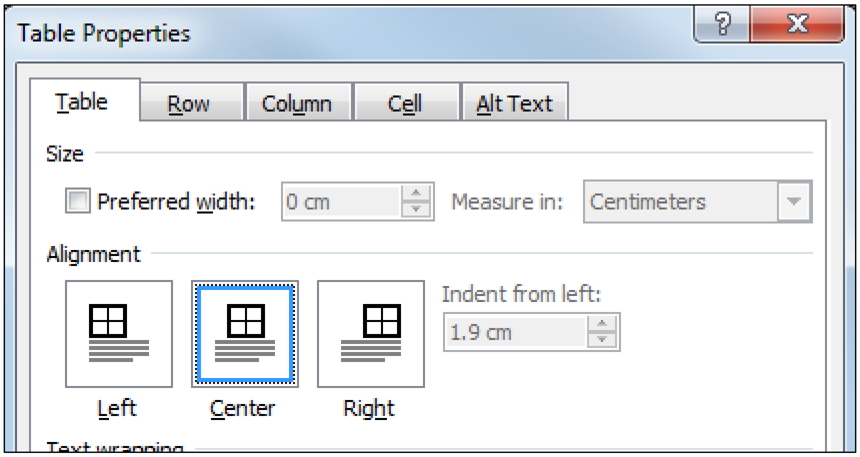
3. Place your cursor where you want the table to start.
4. At the top of the window, click the **Insert** tab.
5. In the **Tables** area, click **Table** (). Microsoft Word displays the **Insert Table** area.
6. In the **Insert Table** area, in the rows of boxes, drag your cursor to highlight the number of rows and columns you want the table to have, and then click the bottom right square of the highlighted area.



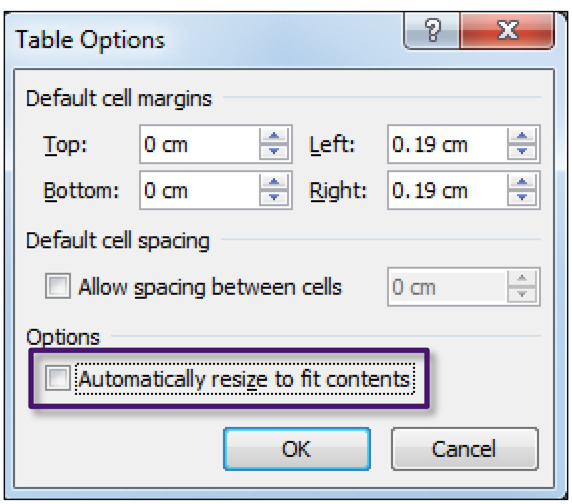
Microsoft word inserts the table.

- If you want to make a column wider or narrower, click and drag the column border.
- If you want to increase the height of a particular row, click and drag the bottom border of the row.

7. Center the table on the page:
   a) Highlight the table, and then right-click.
   b) Click **Table Properties**. Microsoft Word displays the Table Properties window.
   c) In the **Table** tab, in the **Alignment** area, click **Center**.

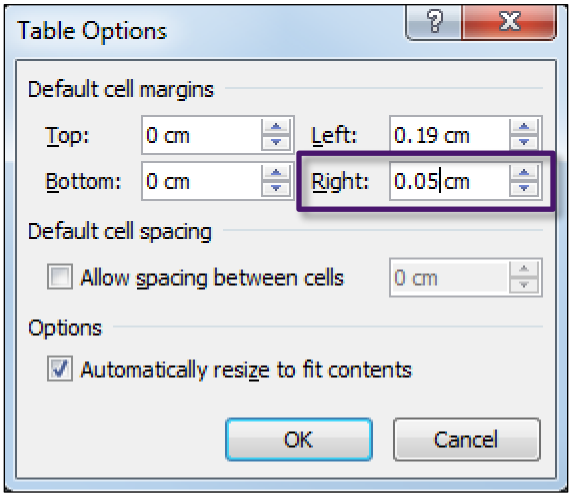


   d) Click **OK**.
8. If you want to prevent table columns from expanding automatically when users enter data, turn off table auto-sizing:
   a) Highlight the table, and then right-click.
   b) Click **Table Properties**. Microsoft Word displays the Table Properties window.
   c) In the **Table** tab, click the **Options** button.
   d) In the Table Options window, clear the **Automatically resize to fit contents** check box.



   e) Click **OK**.
9. To maximize the amount of space you can use in the table for content, set the right-hand margin to default to 0.05cm for all table cells:
   a) Highlight the entire table, and then right-click the highlighted area.
   b) Click **Table Properties**.
   c) On the Table Properties window, in the **Table** tab, click **Options**.

d) On the Table Options window, in the **Default cell margins** area, in the **Right** field, enter **0.05 cm**.



e) Click **OK**.

Merging table cells

If you want to combine two or more adjacent table cells into one cell, you can merge cells.

To merge table cells:

1. Highlight the cells you want to merge, and then right-click the highlighted area.
2. Click **Merge Cells** (). Microsoft Word combines the selected cells into one cell.

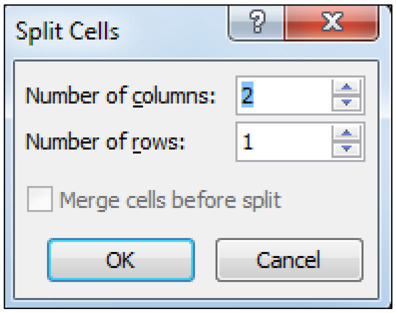
> If, before the merge, there is text or other items in the selected cells, Microsoft Word combines the items in the merged cell.

Splitting table cells

If you want to split a table cell into multiple cells, you can split a cell into any number of rows and columns.

To split table cells:

1. Right-click in the cell you want to split, and then click **Split Cells** (). Microsoft Word displays the Split Cells window.



2. In the Number of columns field, enter the number of columns you want to split the cell into.
3. In the Number of rows field, enter the number of rows you want to split the cell into.
4. Click **OK**. Microsoft Word splits the cell into the number of rows and columns you specified.

Modifying and hiding table borders

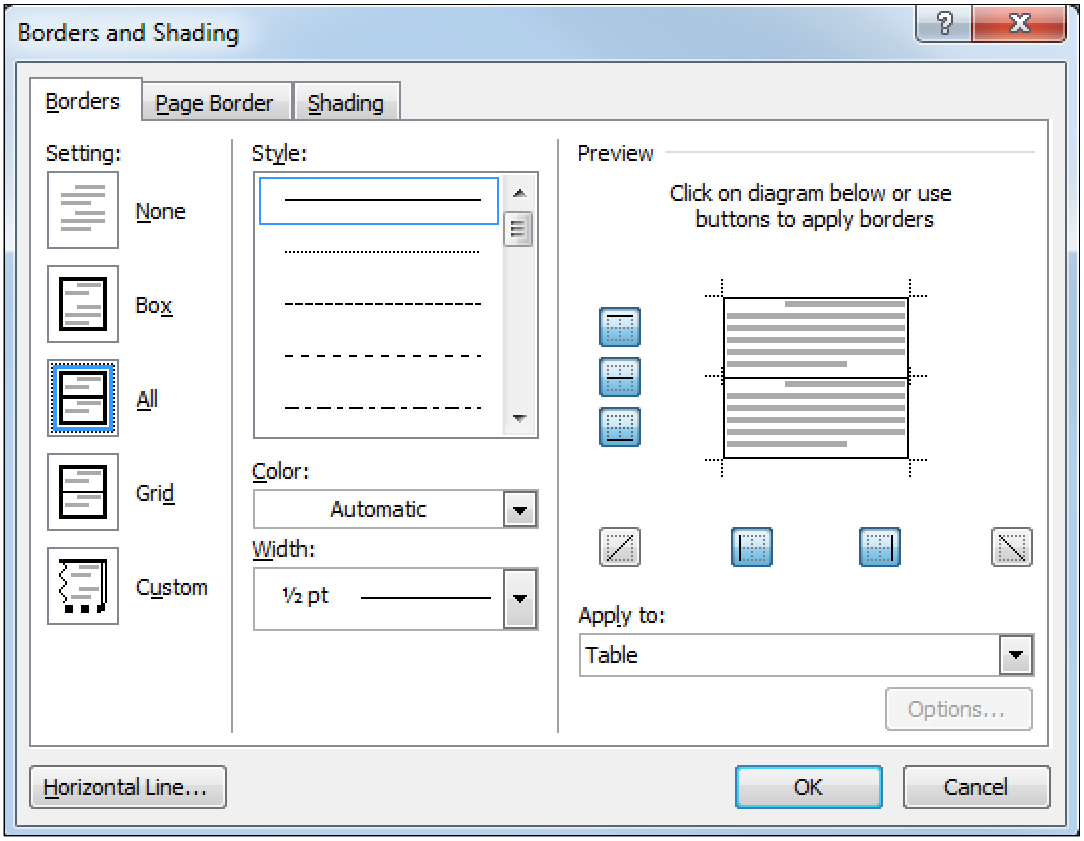
When you add a table, all borders are visible by default with a thickness of 0.5pt. For the entire table or for selected table cells, you can:

- Hide selected borders
- Modify the style and thickness of selected borders

When you hide table borders, the borders become invisible but content within the table still acts as if the borders are there (for example, text and other elements in table cells line up in the table format).

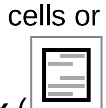
To modify or hide table borders:

1. Highlight the cell(s) you want to modify, or to modify borders for the whole table at once, highlight the entire table.
2. Right-click the highlighted area, and then click **Borders and Shading…**(). Microsoft Word displays the Borders and Shading window.



3. If you are hiding table borders:

   a) Perform one of the following actions:

      - If you want to hide all borders for the selected cell(s) or table, in the **Setting** area, click **None** ().
      - If you want to hide the borders separating rows and columns of the selected cells or table, but leave the surrounding border visible, in the **Setting** area, click **Box** ().
      - If you want to hide specific borders for the selected cells or table, in the **Setting** area, click **Custom** (), and then in the **Preview** area, click to un-highlight borders you want to hide. For example, click  to hide the top border of the selected area of cells.

      Microsoft Word previews the hidden borders in the **Preview** area.

   b) In the **Apply to** drop down list, click one of the following options:

      - **Table**: To apply the hidden borders to the entire table.
      - **Cell**: To apply the hidden borders to only the selected cell(s).

4. If you are modifying table border style or thickness:

a) To modify the style of table borders, in the **Style** area, click a line style.

b) To modify the color of table borders, in the **Color** drop-down, click a color.

c) To modify the thickness of table borders, in the **Width** drop-down list, click a pt thickness.

> 1 inch = 72 points

d) Perform one of the following actions:

- If you want to apply the border modification(s) to all borders of the selected cell(s) or table, in the **Setting** area, click **All** ( ).
- If you want to apply the border modification(s) to only the surrounding border, in the **Setting** area, click **Box** ( ).
- If you want to apply the border modification(s) to only selected cell or table borders, in the **Setting** area, click **Custom** ( ), and then in the **Preview** area, click to highlight borders you want. For example, click to apply the modifications to only the top border.

Microsoft Word previews the border modification(s) in the **Preview** area.

e) In the **Apply to** drop down list, click one of the following options:

- **Table**: To apply the modified borders to the entire table.
- **Cell**: To apply the modified borders to only the selected cell(s).

5. When you finish, click **OK**.

Adding static elements to restricted SMART forms

When you create a fill-in only form, any content that is not a text field, check box, or drop-down list cannot be edited by the user. Static, or un-editable, content includes text, underlines, tables, pictures, and digital signatures.

Adding static text

When you create a restricted form, any text you type on the Microsoft Word document becomes static text when the form is used in Wolf EMR.

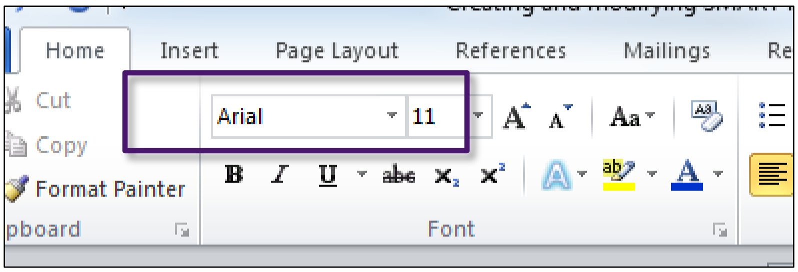
You can use static text to:

- Add descriptive information to a form, such as a title for the form or a name for a field
- Display a hyperlink for a URL in a form. When the hyperlink is clicked, the web page for the URL displays in a separate browser window

- Populate the form with patient data or practitioner information using bookmarks

To add static text to a restricted form:

1. Place your cursor where you want to insert text.
2. Optionally, adjust the text font:
   a) At the top of the window, click the **Home** tab if it is not selected already. In the **Font** area, Microsoft Word displays the current font type and size.



   b) If you want to change the font type, in the drop-down list, click the font you want.

The font type **Arial Narrow** is optimal for most forms.

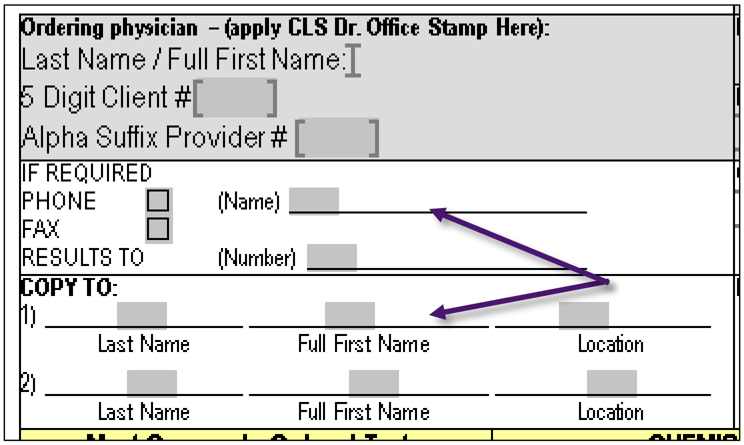
   c) If you want to change the font size, in the size drop-down list, click the point size you want.

A font size of **10pt** or **11pt** is optimal for most forms.

3. Enter text as you would for a normal Word document.
4. If, in the middle of a sentence, you want patient-specific or practitioner-specific data to pull automatically, insert a bookmark. See “Inserting bookmarks” on page 60.

Adding underlines

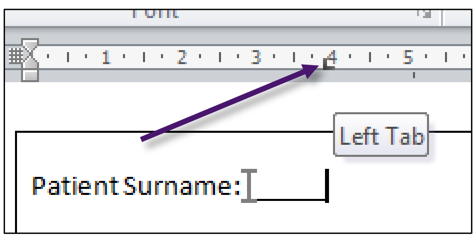
If on certain areas of a form you want a text field or pulled data (bookmark) to display on a line (for example, fields that the patient will fill out on a printout of the form), you can insert an underline.



To add an underline:

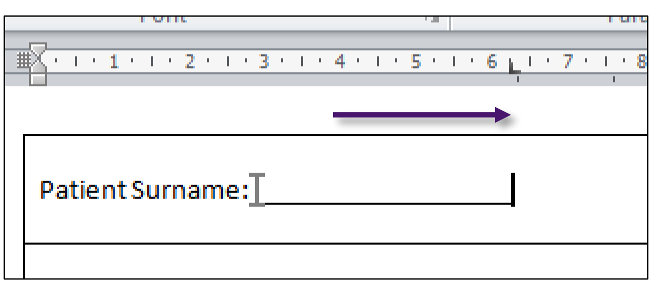
1. On the SMART form, highlight the bookmark or field you want to have an underline for.
2. At the top of the window, click the **Home** tab, and then in the **Font** area, click **Underline** (U).
3. Place your cursor to the right of the bookmark or field, and then on your keyboard, press **Ctrl** + **Tab**. Microsoft Word inserts a line the length of the tab.
4. To increase the length of the line:

   a) Directly above the line, click the ruler at the top of the page. Microsoft inserts a Left Tab indicator.



If the ruler is not visible, at the top of the window, click the **View** tab, and then in the **Show** area, select the **Ruler** check box.

   b) Click and drag the Left Tab indicator to the right. Microsoft Word extends the line to the Left Tab indicator.



Adding pictures

You can add pictures to SMART forms, such as logos for letterheads.

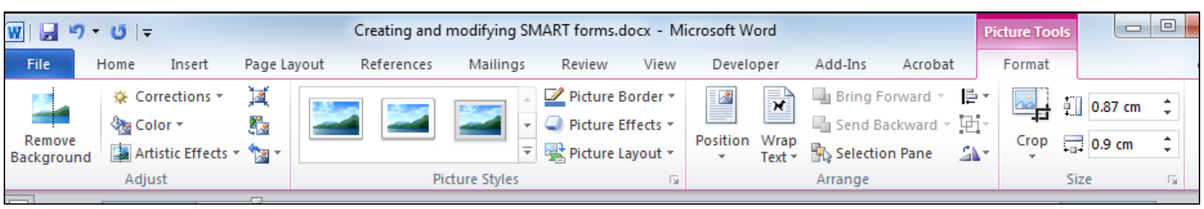
- The size of a picture should be as small as possible, while still maintaining a good quality when the SMART form is printed. The size of your entire SMART form should not exceed **200kb**.
- To ensure that the picture quality is sufficient, test print the form.
- For clinic logos and other non-photographic images, use **.gif** or **.png** files (avoid using **.bmp** files).

To add a picture to a SMART form:

1. On the SMART form, place your cursor where you want the picture to insert.
2. At the top of the window, click the **Insert** tab.
3. In the **Illustrations** area, click **Picture** ( ). Microsoft Word displays the Insert Picture search window.
4. Search for and select the picture file.

If you are creating the SMART form on your Remote Desktop, you can select a picture file only if it resides on the Remote Desktop. Copy and paste the picture file from your local computer to the Remote Desktop.

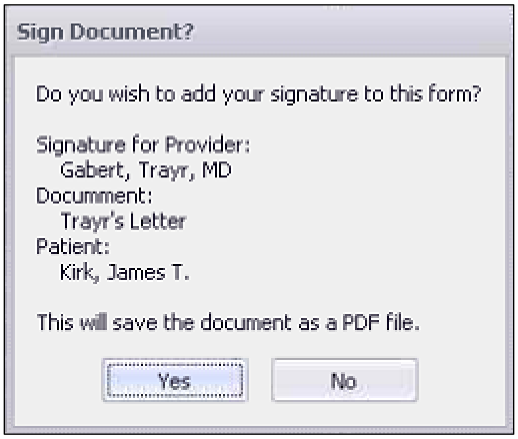
5. Click **Insert**. Microsoft Word inserts the picture and displays the **Picture Tools Format** tab at the top of the window.



6. If you want to modify the picture:
   a) Click the picture, and then on the top of the window, click the **Picture Tools Format** tab.
   b) Use the various Microsoft Word Picture Tools available to edit, resize, position, crop, rotate, and enhance the picture as needed. For more information on how to use the picture tools in Microsoft Word, see **Microsoft Word Help** ( ).

Adding electronic signatures

You can have a SMART form pull practitioner electronic signatures by inserting a signature bookmark. When the SMART form is used for a patient, a user with a practitioner role is prompted to insert their signature. If an MOA has permission to use a practitioner's signature, the MOA is prompted to insert the practitioner's signature when they use the form. This saves time, by removing the need for the practitioner to manually sign a printout of the SMART form.



A practitioner's electronic signature must be imported into Wolf EMR before it can be used in SMART forms. For information on how to import signatures, in Wolf EMR Online Help, search the topic "**SMART Form Signatures**".

SMART forms that contain electronic signatures are saved in the Documents tab of patient medication summaries as PDF files, and cannot be modified later.

To add an electronic signature in a SMART form:

1. On the SMART form, place your cursor where you want the signature to display.
2. Insert the appropriate signature bookmark. See "Inserting bookmarks" on page 60. Use one of the following bookmarks:

Bookmark name	Description
MDSignature	This bookmark inserts an image of the practitioner's signature. Use this bookmark in letter templates (where there is no restriction on the size of the signature).
MDSmallSignature	This bookmark inserts a smaller image of the practitioner's signature. Use this bookmark in requisition forms and other entry forms where there's a restriction on the size of the signature.

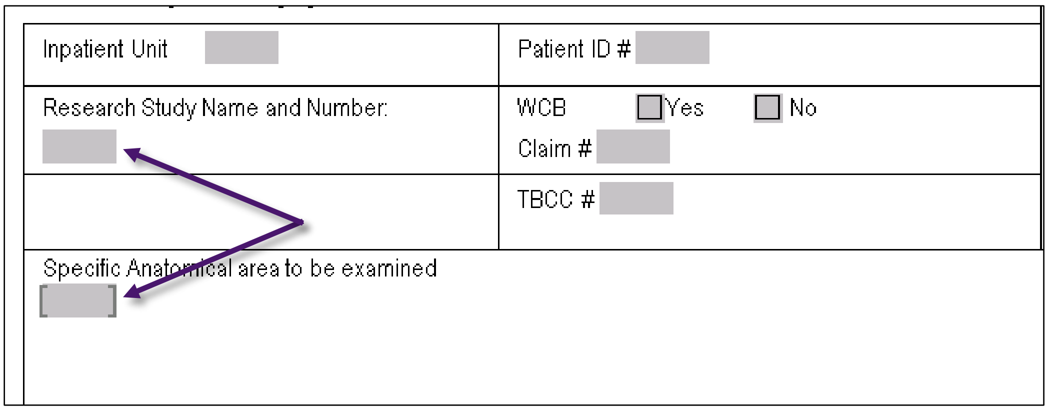
Adding user interface elements to restricted forms

When you use a fill-in only form, you can enter data only in designated text fields, check boxes, and drop-down lists. These entry items are known as "user interface elements".

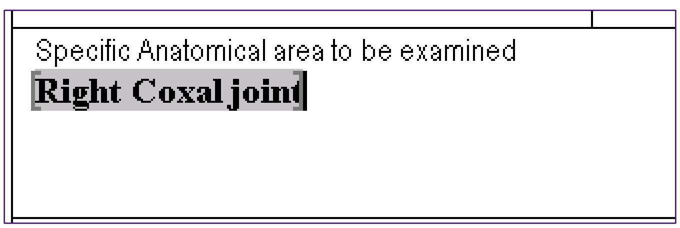
Before you can add user interface elements to SMART forms, you must enable the Developer tab in Microsoft Word. See "Activating the Microsoft Word Developer tab" on page 22.

Adding text fields

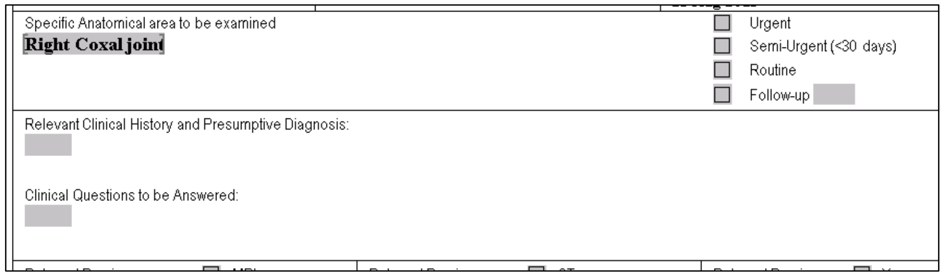
Add text fields anywhere you want to enable users to manually enter text. Text fields display as grey areas on the form.



When a user enters information into a text field, the grey text area expands to accommodate the amount of text the user enters. Users can enter only the amount of text enabled by the size of the table cell, and by the properties of the field.



If users may need to enter a large amount of text, ensure the table cell that the text field occupies is large enough to accommodate the entered text. For example, if an area on the form asks for a Clinical History, you can make this cell larger.

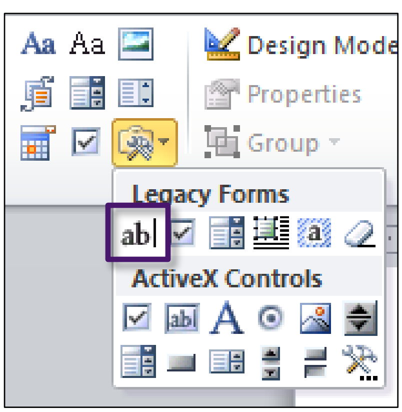


Additional tips for increasing data entry space:

- Set table cell right margin to 0.05. See "Inserting tables" on page 39.
- Format the cell paragraph spacing so that text is as compact as possible. Format the paragraph to be single-spaced, and have 0pt before and after lines.

To add a text field:

1. On the SMART form, place your cursor where you want to insert the text field.
2. At the top of the window, click the **Developer** tab.
3. In the **Controls** area, click **Legacy Tools** ( ).
4. In the **Legacy Forms** area, click **Text Form Field** (ab|).

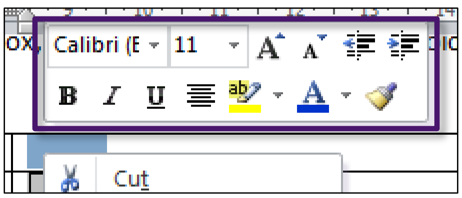


CAUTION: Do not click the **Text Box** ( ) item in the **ActiveX Controls** area or the text field will not work properly. You can use only Legacy Forms items for SMART forms.

Microsoft Word inserts the text field, which displays as a grey area.

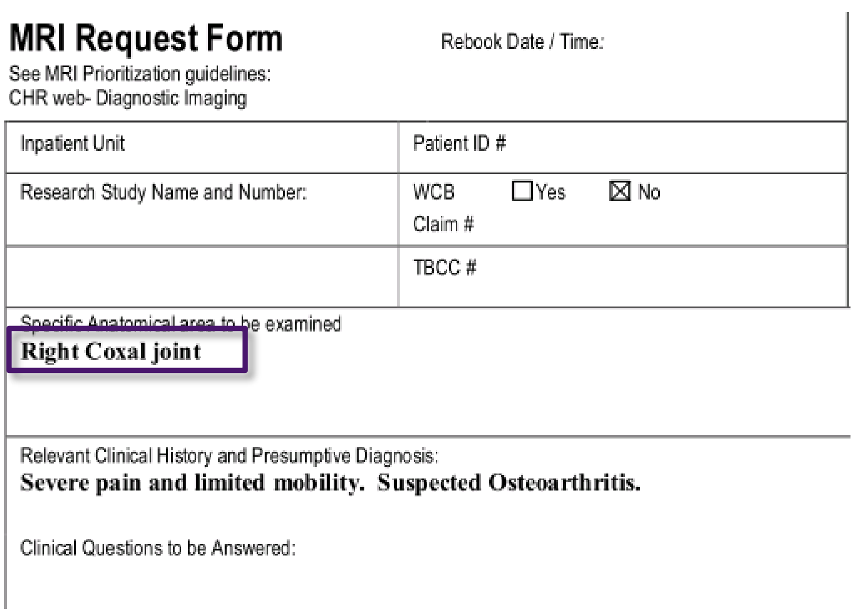
5. Optionally, adjust the font for text entered in the field:

   a) Highlight the text area, and then right-click. Microsoft Word displays a font area.



   b) If you want to change the font type, in the drop-down list, click the font you want.

Set the font to be different from the font used for the static text of the form. This way, when the completed form is printed, it is easy to distinguish entered data.



MRI Request Form

See MRI Prioritization guidelines:
CHR web- Diagnostic Imaging

Rebook Date / Time:

Inpatient Unit	Patient ID #
Research Study Name and Number:	WCB ☐Yes ☒ No Claim #
	TBCC #

Specific Anatomical area to be examined
Right Coxal joint

Relevant Clinical History and Presumptive Diagnosis:
Severe pain and limited mobility. Suspected Osteoarthritis.

Clinical Questions to be Answered:

Bolded text with the font type of **Times New Roman** is optimal for most forms.

c) If you want to change the font size, in the size drop-down list, click the point size you want.

A font size of **10pt** or **11pt** is optimal for most forms.

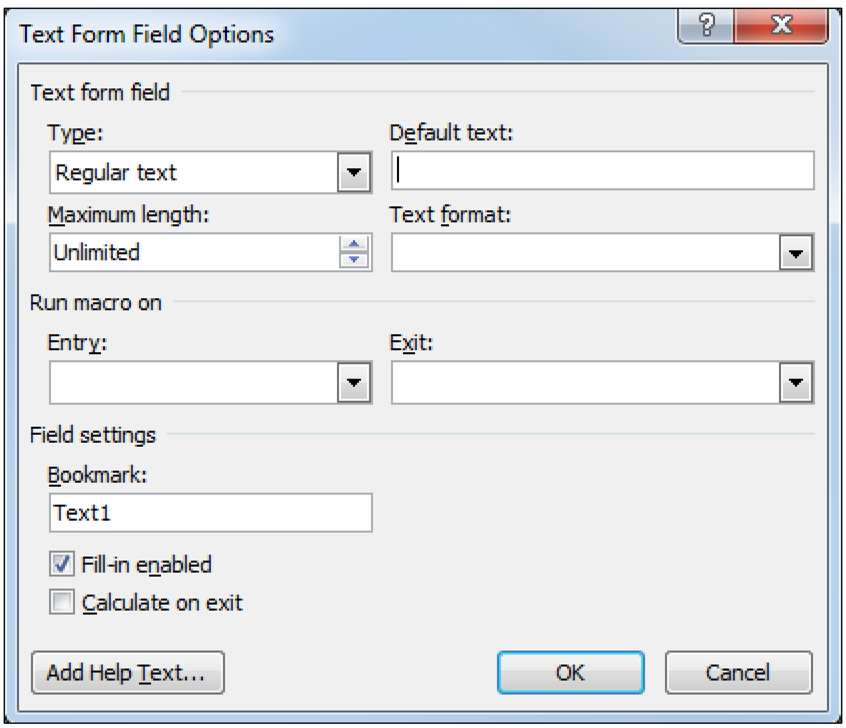
Restricting what data users can enter in specific text fields

If you want to allow users to input only a certain type of data into a text field (for example, you want to force users to enter a date with a specific format), you can specify a text field type.

Also, if you want to limit the amount of data users can input into a field, you can restrict the number of characters allowed.

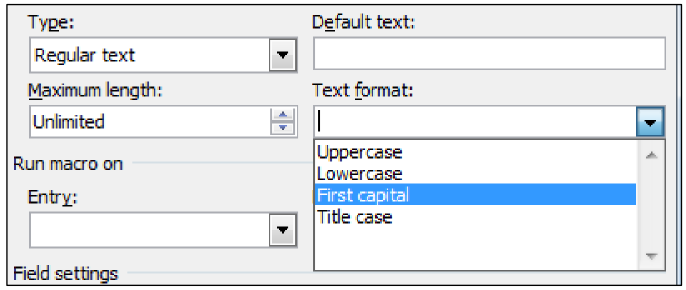
To restrict what data users can enter into a text field:

1. Right click the text field, and then click **Properties**. Microsoft Word displays the Text Form Field Options window.



2. To allow the user to input only a certain type of data, using the following table, in the **Type** drop down list, click an option.

Field	Description
Regular text	(Default option) Enables users to enter any type of text. If you want entered text to have a specific case format, in the **Text format** drop-down list, click an option.

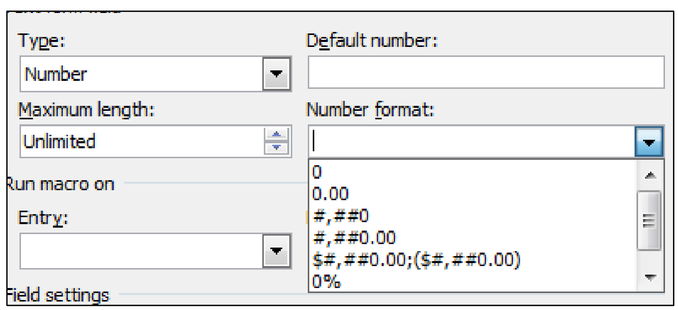
<table>
<tr>
<td></td>
<td>


If you want default text to display in the field (for example, instructions or tips for the form user), in the **Default text** field, enter the text.

Note: Users can overwrite default text.
</td>
</tr>
<tr>
<td>Number</td>
<td>
Forces users to input a number.

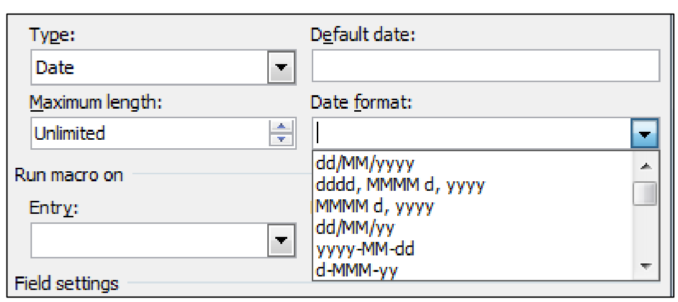
In the **Number format** drop-down list, click the number format users are to use.

If you want a default number to display in the field, in the **Default number** field, enter the number.



</td>
</tr>
<tr>
<td>Date</td>
<td>
Forces users to input a date.

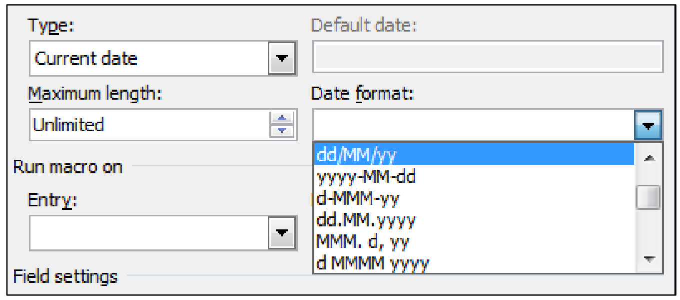
In the **Date Format** drop-down list, click the format users are to use.



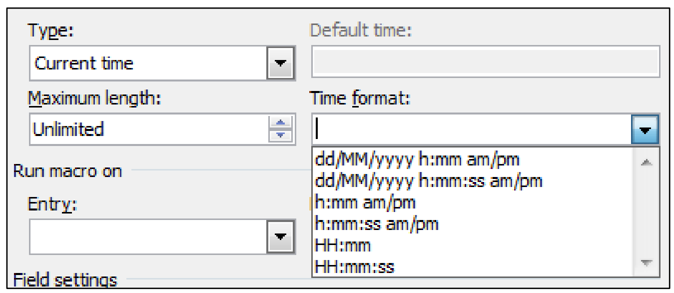
</td>
</tr>
<tr>
<td>Current date</td>
<td>
Populates the field with the date that the form is used, but enables users to edit the date if needed. Users can enter only a date in this field.

In the **Date format** drop-down list, click the date format you
</td>
</tr>
</table>

<table>
<tr><td></td><td>want.


</td></tr>
<tr><td>Current time</td><td>Populates the field with the time that the form is used, but enables the user to edit the time if needed. Users can only enter a time in this field.

In the Time format drop-down list, click the time format you want.


</td></tr>
</table>

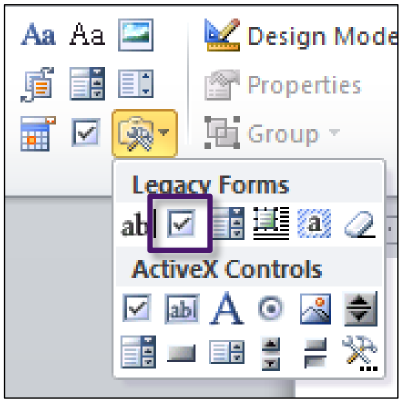
3. If you want to allow users to enter only a certain amount of text, in the **Maximum length** field enter the maximum number of characters.
4. Click **OK**.

Adding check boxes

You can add check boxes to present options from which a user can select.

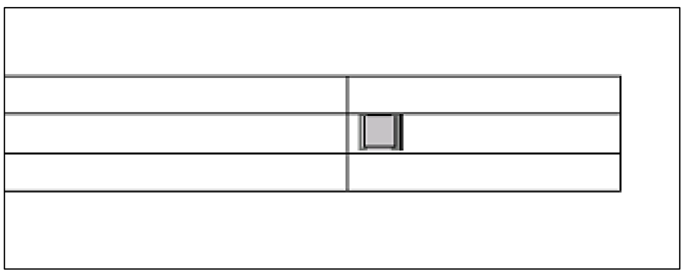
To add a check box:

1. On the SMART form, place your cursor where you want the check box to insert.
2. At the top of the window, click the **Developer** tab.
3. In the **Controls** area, click **Legacy Tools** ().
4. In the **Legacy Forms** area, click **Check Box Form Field** ().



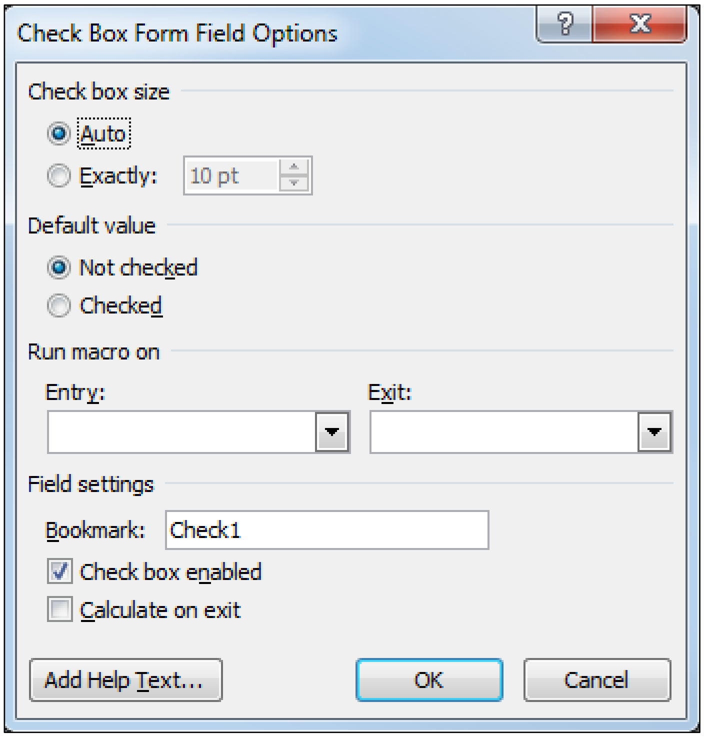
CAUTION: Do not click the check box item in the **ActiveX Controls** area, or the check box will not work properly. You can use only Legacy Forms items for SMART forms.

Microsoft Word inserts the check box and places your cursor to the right of the check box.



5. Enter the check box tag (text to go with the check box).
6. If you want to modify the size or other properties of the check box:

   a) Right click the check box, and then click **Properties** (). Microsoft Word displays the Check Box Form Field Options window.



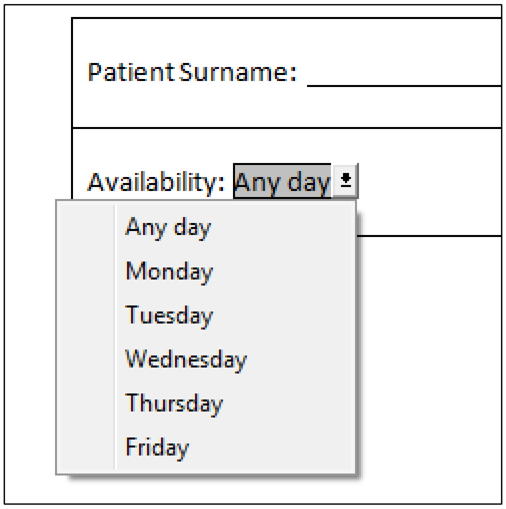
b) Use the following table to modify the check box properties.

Property	Description
Check box size	Select one of the following options: ■ **Auto**: To have the size of the check box change automatically to match the size of the check box tag font. ■ **Exactly**: To specify an exact point size for the check box.
Default value	Select one of the following options: ■ **Not checked**: To have the check box cleared by default. ■ **Checked**: To have the check box selected by default.

c) When you finish, click **OK**.

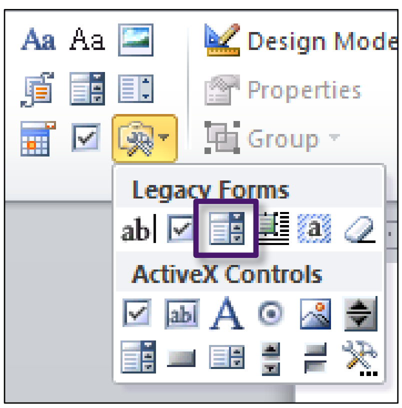
Adding drop-down lists

If you want to enable users to choose only one item from a list of options, you can add a drop-down list.



To add a drop-down list:

1. On the SMART form, place your cursor where you want to insert the check box.
2. At the top of the window, click the **Developer** tab.
3. In the **Controls** area, click **Legacy Tools** ( ).
4. In the **Legacy Forms** area, click **Drop-Down Form Field** ( ).

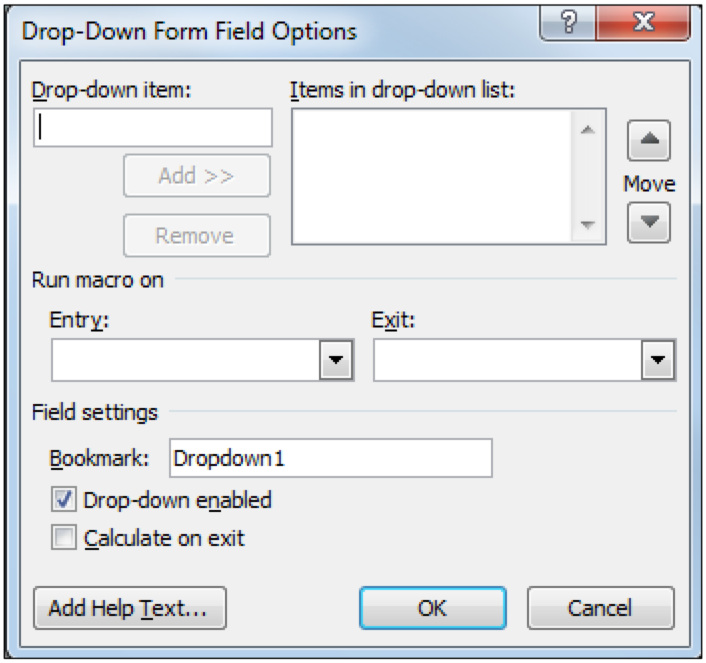


CAUTION: Do not click the combo box item in the **ActiveX Controls** area, or the drop-down list will not work properly. You can use only Legacy Forms items for SMART forms.

Microsoft Word inserts the drop-down list as a grey box.

5. Add list items to the drop-down list:

   a) Right click the drop-down list, and then click **Properties** ( ). Microsoft Word displays the Drop-Down Form Field Options window.

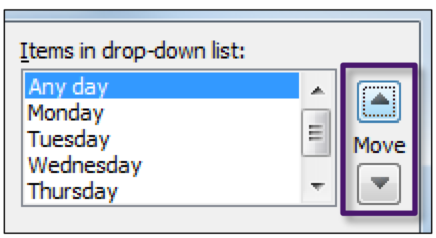


b) In the **Drop-down item** field, enter an item to display in the drop-down list.

c) Click **Add >>**. The item displays in the **Items in drop-down list** area.

d) Repeat step b) and step c) for all items on the list.

e) If you want to change the order of a listed item, in the **Items in drop-down list** area, click the item, and then click the up or down **Move** icons until the item is in the correct place.



The item that displays at the top of the list is the default selection for the field.

Programming SMART forms to populate data automatically

You can program SMART forms to automatically populate a variety of information, including:

- Patient demographic and medical information
- Patient exam data
- Practitioner and clinic information
- Form date

SMART forms pull information from your EMR using the Microsoft Word bookmark feature, and Wolf EMR defined bookmarks.

Inserting bookmarks

To insert a bookmark:

1. In Wolf EMR Online Help, find the bookmark you want:

   a) On the Wolf EMR Launch page, click the **Help** ( ) icon. The EMR displays the Wolf EMR Online Help window.

   b) At the top of the window, click Search ( ) and then, in the search field, enter the term "**Bookmarks**".

   c) In the list of matching topics, click **Bookmarks**. The help page displays the Bookmarks topic.

   d) In the Bookmarks article, in the **Categories of bookmarks** area, expand the appropriate category and subcategory. Wolf Online Help displays a table with the following columns:

   - **Bookmark**: Displays the bookmark name.
   - **Description**: Describes what information pulls when the bookmark is used.
   - **Location**: Describes where in the EMR the information is pulled from

Categories of bookmarks

- ⊞General
- ⊞Building
- ⊞Clinic Address
- ⊞Clinic MD
- ⊞Composer
- ⊞Consultant MD
- ⊞Family MD
- ⊞Insurer
- ⊞Labs
- ⊟ Patient Demographics

For Patient Referral MD bookmarks, see bookmarks used for Referral MD

⊟ **Patient Demographics name bookmarks**

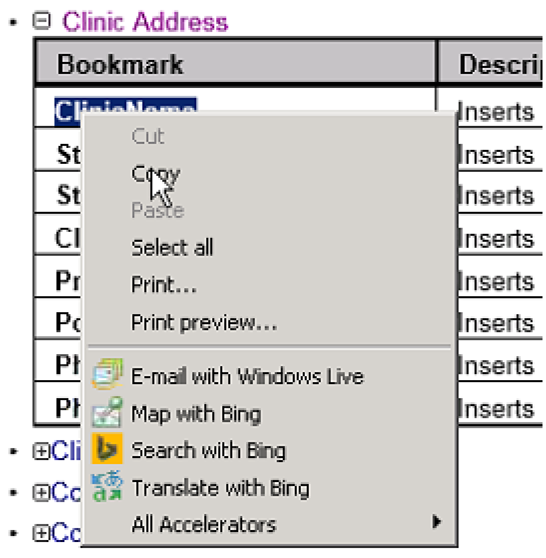
Bookmark	Description	Location of Information
PatientFLName	Inserts the patient's First and Last name	Name/Addr/Phone tab in Patient Maintenance
PatientLName	Inserts the patient's Last name (Family Name)	
PatientFName	Inserts the patient's First name (Given Name)	
PatientMiddleName	Inserts the patient's Middle name	
PatientChosenName	Inserts the patient's Chosen name	

⊞**Patient Demographics address bookmarks**

e) Note the bookmark name displayed in the far left column.

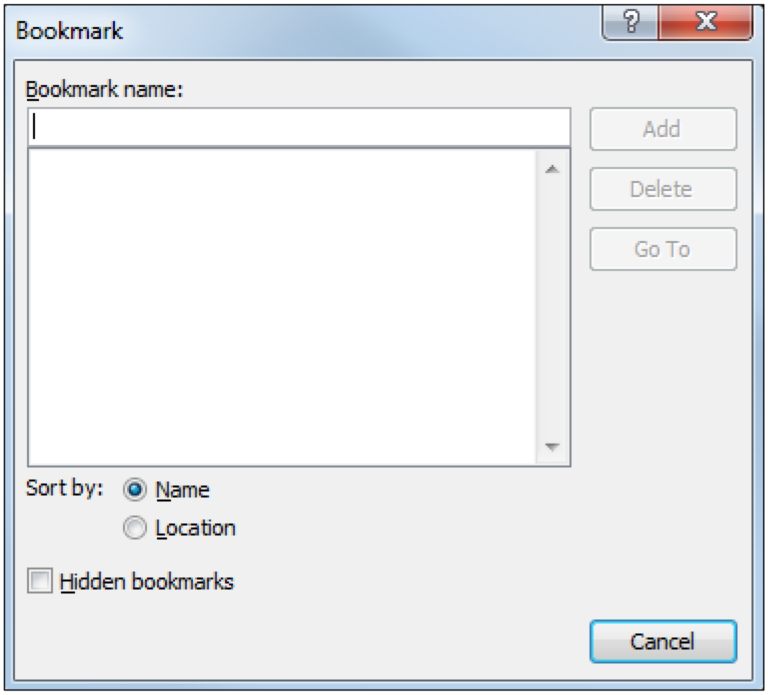
To prevent misspelled bookmarks, you can copy the bookmark name:

1. Highlight the bookmark name, and then right-click the name.
2. Click **Copy**.



Note: You can also copy bookmarks using the <**Ctrl**><**C**> keyboard shortcut.

2. On the SMART form, click where you want the bookmark's data to pull into.
3. On the Microsoft Word menu, click the **Insert** tab.
4. In the **Links** area, click **Bookmark** (). Microsoft Word displays the Bookmark window.



5. In the **Bookmark name** field, enter the appropriate Wolf EMR bookmark.

If you copied the bookmark name in the Wolf EMR Help window, paste the bookmark name in the **Bookmark name** field:

1. In the **Bookmark name** field, right-click.
2. Click **Paste**.

6. Click **Add**. Microsoft Word inserts a character (I) where the bookmark is inserted.

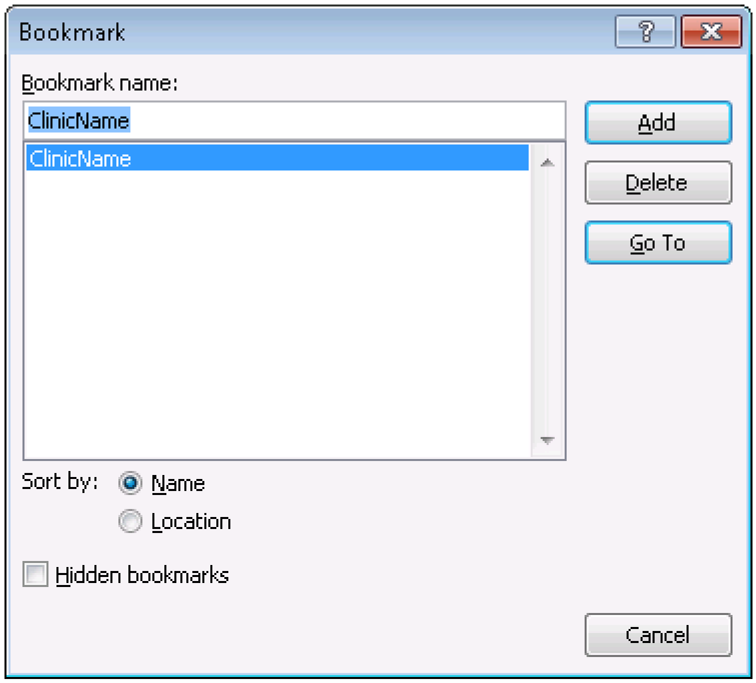
The I character shows where the bookmark's information will pull when the SMART form is used.

If you do not see the I character, this indicates that Microsoft Word is not configured to show bookmarks. See "Setting up Microsoft Word to show bookmarks" on page 24.

If you later want to see what bookmark a I character represents :

1. Highlight the I character, and then at the top of the window, click the **Insert** tab.

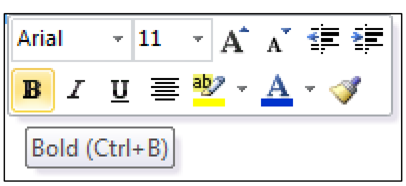
2. In the **Links** area, click **Bookmark** ( ). Microsoft Word displays the Bookmark window with the bookmark displayed in the **Bookmark name** field.



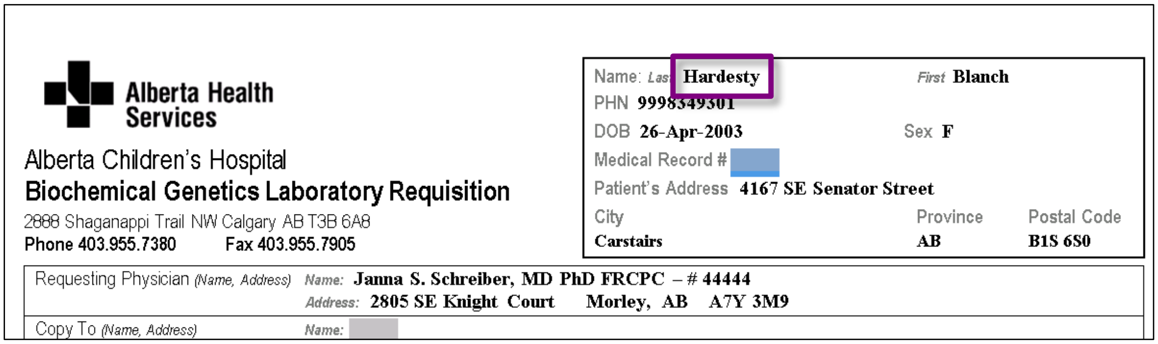
3. When you finish viewing the bookmark, click **Cancel**.

7. If you want the bookmark information to display with a different font:

   a) Highlight the bookmark, and then right-click. Microsoft Word displays the font toolbar.



   b) Using the font toolbar, modify the font as needed. When the form is used, the bookmark information displays with the modified font.



If you are creating a fill-in only SMART form, for entry fields and bookmarks that are "filling in" the form, use a font that is distinctly different than the original form. This way, when you print the form, the "answers" are clearly visible.

Recommendation:

For bookmarks and entry fields, use the font **Times New Roman**, with the size of **11pt**, and **bolded**.

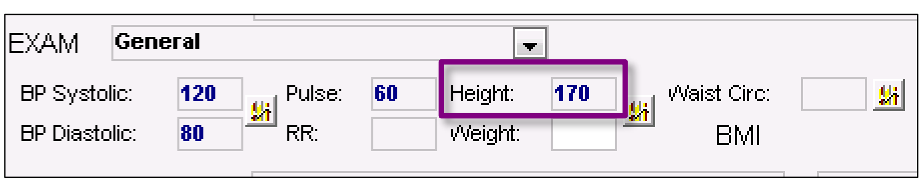
Using bookmarks to pull data from exams

If you use pre-existing or customized structured exams to enter visit notes, you can pull information from the exam fields, check boxes, and drop-down lists into SMART forms. Each entry field in a structured exam has a unique name. Using exam field names you can create and insert bookmarks for the desired fields.

To insert a bookmark to pull data from an exam field:

1. On the SMART form, click where you want the bookmark to be, and insert a bookmark. See step 2 to step 4 in "Inserting bookmarks" on page 60.
2. In the Bookmark window, in the **Bookmark name** field, perform one of the following actions:

   - If the exam field is on a pre-existing exam that came with Wolf EMR, enter **EX_<exam field name>**. For example, to insert the bookmark for height, from the below exam, enter **EX_Height**.



   - If the exam field is on a customized exam that your clinic created, enter **EXC_<exam field name>**. For example, if an exam check box is called "murmer", enter **EXC_murmer**.

Important: If the exam field name contains more than one word, take out the space between words for the bookmark. For example, if the exam field name is “Active Supine Cervical Flexion”, enter **EXC_ActiveSupineCervicalFlexion** for the bookmark.

3. Click **Add**.

Using the same bookmark multiple times on a SMART form

You can use a specific bookmark name only once in a single form. If you try to insert the same bookmark a second time on a SMART form, the bookmark disappears from the first location and moves to the second location.

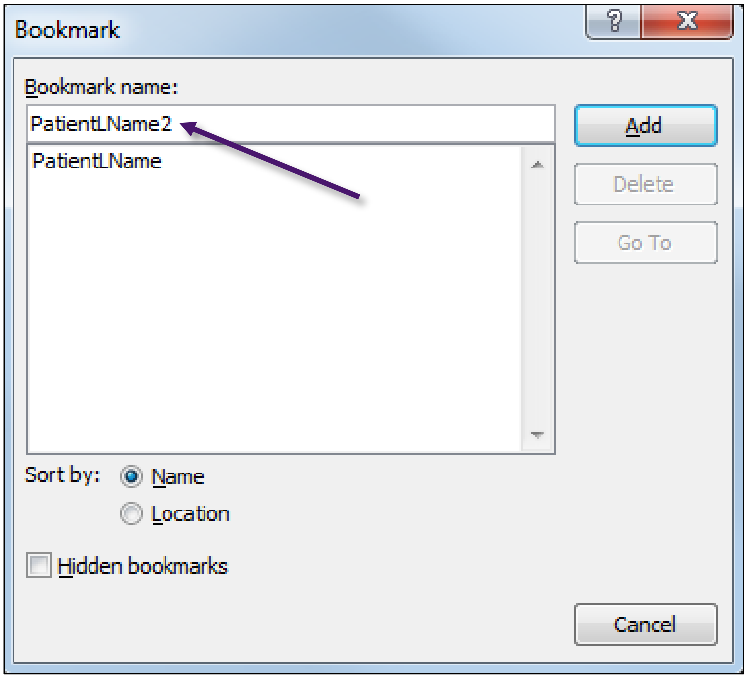
Also, if you combine multiple forms into one Order Set, if there are multiple instances of the same bookmark, only the first instance remains while all the other instances disappear automatically. See “Combining multiple forms into one order set” on page 76.

You can enter a bookmark multiple times by using the bookmark name followed by a number.

To use the same bookmark multiple times on a SMART form:

1. Insert the first instance of the bookmark as normal. See “Inserting bookmarks” on page 60.
2. On the SMART form, click where you want the next instance of the same bookmark to be.
3. Insert the bookmark similar to how you insert the first instance of the bookmark, with the following exception:
    - In the Bookmark window, in the **Bookmark name** field, enter the Wolf EMR bookmark name followed by a unique number.

    For example, if you want to pull a patient’s last name in two places on a form, for the second instance, enter the bookmark name **PatientLName2**.



4. To insert the same bookmark again, repeat step 3, but enter a different number following the bookmark name.

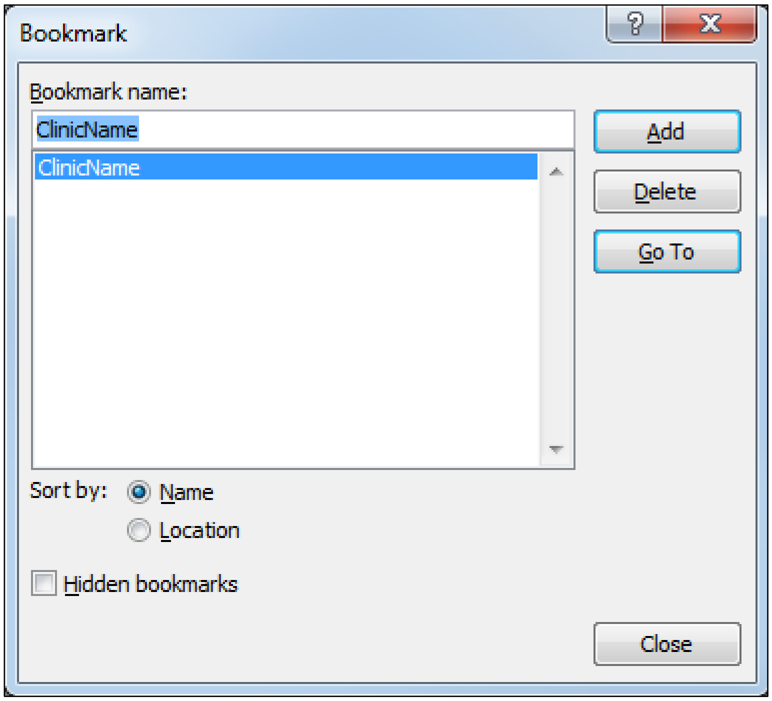
> You can use the same bookmark as many times as you need, as long as each instance has a unique number following the bookmark name.

Deleting bookmarks

If you want to delete a bookmark, you cannot highlight and delete it as you do regular text. Instead, you open the Bookmark window, and delete the bookmark from there.

To delete a bookmark:

1. On the SMART form, click to the right of the bookmark character (I), placing your cursor beside the bookmark.
2. At the top of the window, click the **Insert** tab.
3. In the **Links** area, click **Bookmark**. Microsoft Word displays the Bookmark window, with the Wolf EMR bookmark displayed in the **Bookmark name** field.



4. Click **Delete**.
5. Click **Close**. Microsoft Word removes the bookmark from the SMART form.

Adding form entry date

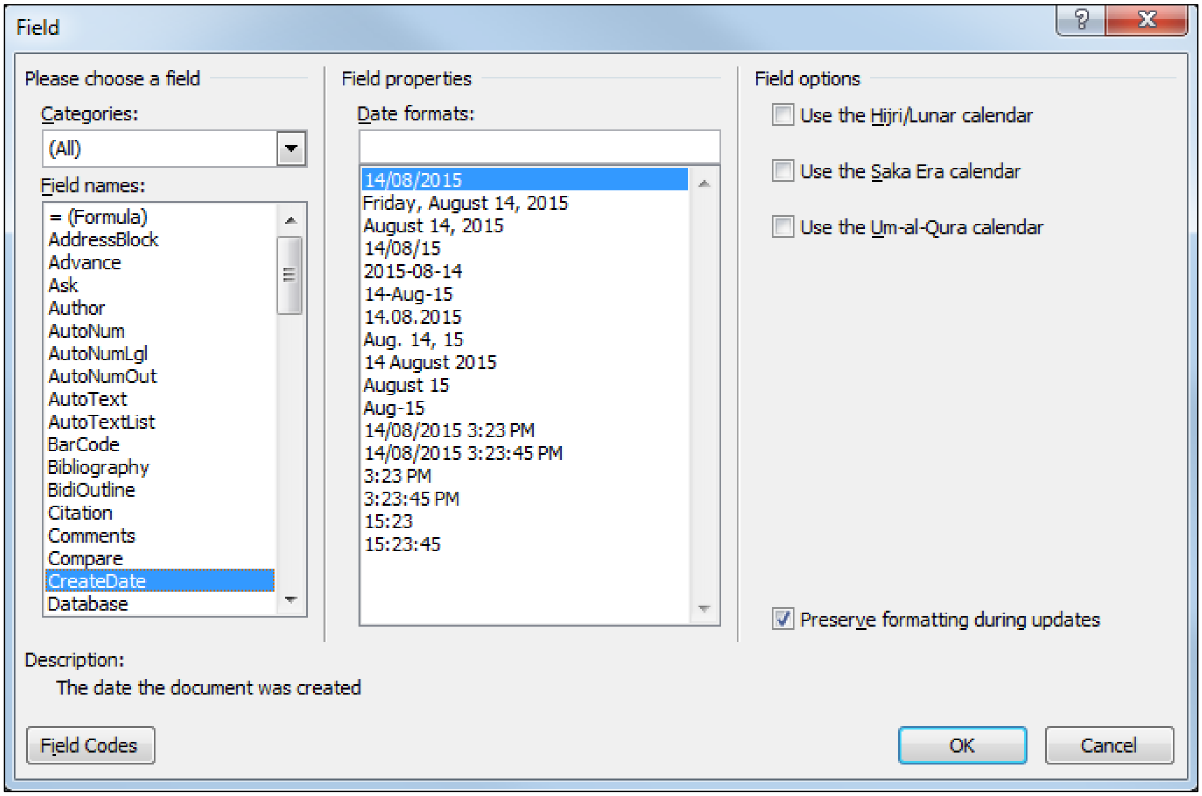
If you want a SMART form to automatically insert the date that the form is filled in, you can insert the form create date. The form create date is the date that the form is used (not the date the form was built).

When you use a SMART form, the form create date cannot be edited. If you want to change the date displayed, you can delete the entire date, and then manually enter a new date.

Note: This work-around works only if the form is not restricted. You cannot edit the create date on fill-in only forms.

To add the form entry date:

1. On the SMART form, click where you want the date to display.
2. On the Microsoft Word menu, click **Insert** and then, in the **Text** area, click **Quick Parts** ().
3. In the **Quick Parts** drop-down list, click **Field** (). Microsoft Windows displays the Field window.
4. In the **Please choose a field** area, click **CreateDate**.



CAUTION: In the **Please choose a field** area, avoid selecting **Date**. If you select **Date**, the date on the SMART form will change every time it is viewed from the **Documents** area of a patient's Medical Summary.

5. In the **Field properties** area, click the format you want the date to display as.
6. Click **OK**. Microsoft Word inserts today's date.

When you use this SMART form, the date changes to the date the SMART form is used.

Adding and removing SMART form editing restrictions

If you are creating a requisition form or other data entry form, you can restrict users from editing the base form itself and enable users to enter text and make selections only in select areas.

You typically do not set editing restrictions on letters unless you want to prevent users from editing pre-existing letter content and bookmarks. Also, if you have a letter SMART form that contains check-boxes, drop-down lists, or text fields, you must restrict the form to be "fill-in" only for these elements to work.

If you want to edit a SMART form that contains editing restrictions, you must remove the restrictions first.

Restricting SMART forms to be fill-in only

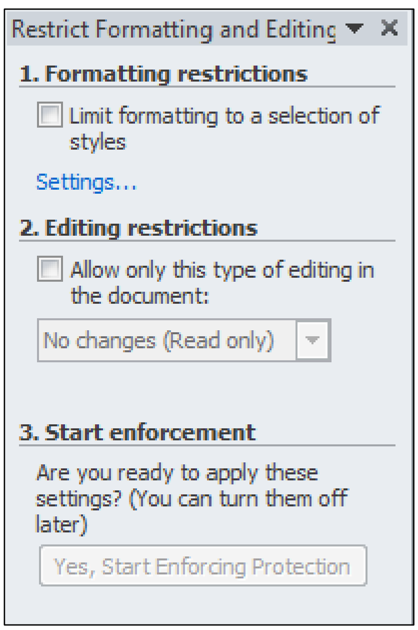
The most common type of editing restriction you use for SMART forms is fill-in only. On forms that are set to be fill-in only, you can select check boxes, enter text in text fields, and make selections in drop-down lists, but you cannot make edits to the base form itself or to data that has been populated with bookmarks.

To set a SMART form to be fill-in only:

1. Create a fill-in only form. See "Creating SMART forms for requisition forms and other entry forms" on page 35.
2. With the SMART form open in developer mode, at the top of the Microsoft Word window, click the **Developer** tab.

> If the **Developer** tab is not available as an option, you must enable the Developer tab. See "Activating the Microsoft Word Developer tab" on page 22.

3. In the **Protect** area, click **Restrict Editing** ( ). Microsoft Word displays the Restrict Formatting and Editing pane on the right side of the window.



4. Under **2. Editing restrictions**, select the **Allow only this type of editing in document** check box.
5. In the drop-down list, click **Filling in forms**.
6. Under **3. Start enforcement**, click **Yes, Start Enforcing Protection**. Microsoft Word displays the Start Enforcing Protection window.

7. Under **Protection method**, click **Password**.

> In the **Password** area, leave the password fields blank. You do not need to enter a password to restrict the form.
>
> **Recommendation**: Avoid adding a password to your SMART forms or you risk losing editing access to the forms if you forget the password.

8. Click **OK**.

9. Save the SMART form. At the top of the Microsoft Word window, click **Save** ( ).

Removing SMART form editing restrictions

If you want to edit a SMART form, you must remove any editing restrictions first.

To remove SMART form editing restrictions:

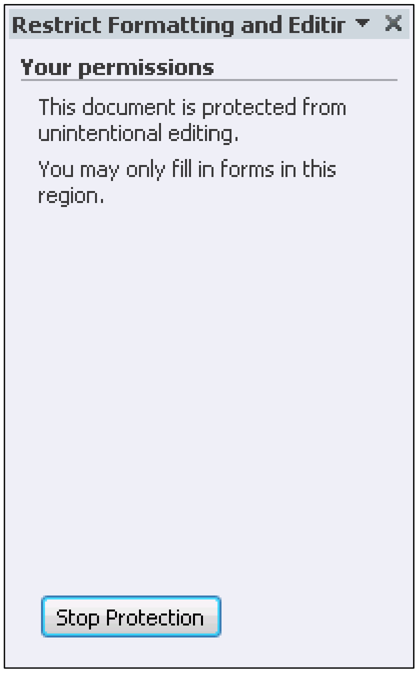
1. Open the SMART form from your User Template folder. See step 1 to step 2 in “Modifying clinic SMART forms” on page 79.

> - SMART forms typically have four files in the template folder. Always modify the Microsoft Word 97 – 2003 Template.
> - **CAUTION**: Do not double-click to open and modify the form. Always right-click and then click **Open**. If you double-click the form to open it, any modifications you make are not saved.

2. At the top of the window, click the **Developer** tab.

If the **Developer** tab is not available as an option, you must enable the Developer tab. See "Activating the Microsoft Word Developer tab" on page 22.

3. In the **Protect** area, click **Restrict Editing** (). Microsoft Word displays the Restrict Formatting and Editing pane on the right side of the window.



4. Click **Stop Protection**. You can now edit the SMART form.

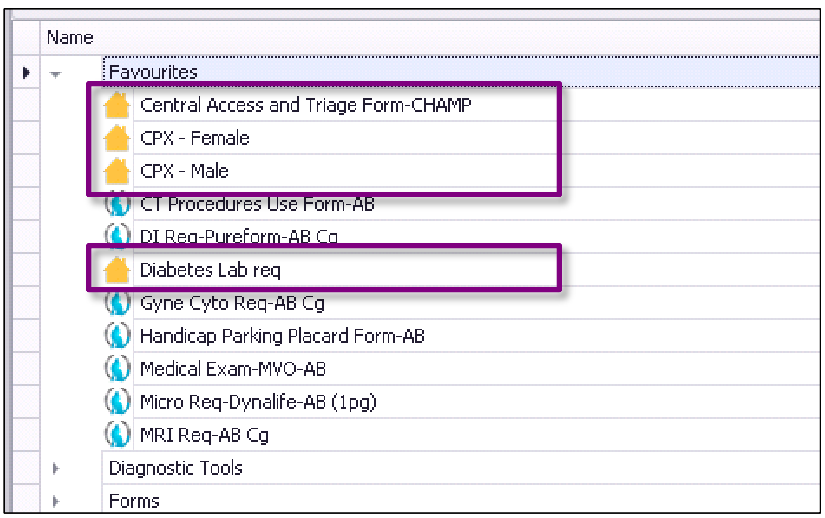
Order sets

If you fill out certain requisition forms with similar information for specific groups of patients (for example, you select the same core lab tests for most diabetic patients), you can create customized copies of these SMART forms with check-boxes and text fields pre-populated.

Also, if you commonly complete a set of requisition forms together, you can customize your SMART forms to combine multiple requisition forms. You can then open all forms together with one click.

Customized, pre-filled versions of SMART forms are called Order Sets.

Order sets display as "house forms" (with a house icon) in your list of SMART Forms. House forms are forms that have been created or modified by your clinic. These forms are not maintained or updated by TELUS Health.



When you open an order set for a patient, you can edit the pre-populated data as needed before you print and save the form.

Creating order sets

You create an order set by saving a copy of the original form in your Order Sets folder. You can then fill in the areas of the form you want and then save the form. You can create as many order sets as you want for one form.

Any user can create Order Sets for their own personal use. Only users with administrative authority in Wolf EMR can create Order Sets for the entire clinic.

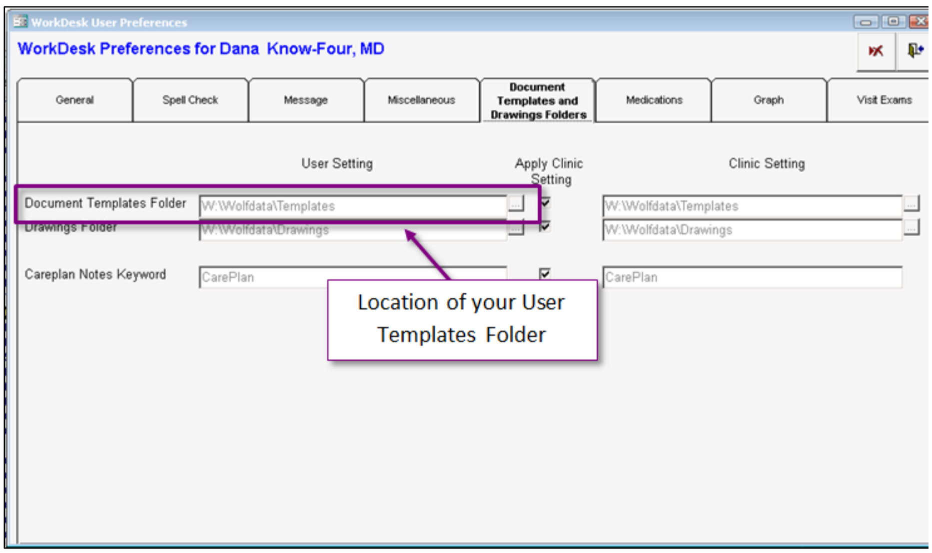
To create an order set:

1. Navigate to the User Templates Folder on your remote computer:

Unless you have had a custom Templates folder set up, your folder location should be **W:|Wolfdata|Templates**.

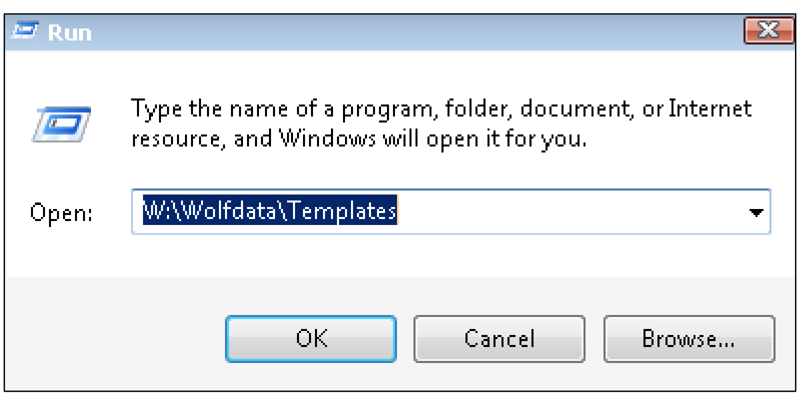
To verify the location of your User Templates folder:

1. On the WorkDesk menu, click **Configure** > **Configure Workdesk**. The EMR displays the WorkDesk User Preferences window.
2. Click the **Document Templates and Drawings Folders** tab.
3. In the **User Setting** area of the window, note the pathway displayed in the **Document Templates Folder** field.



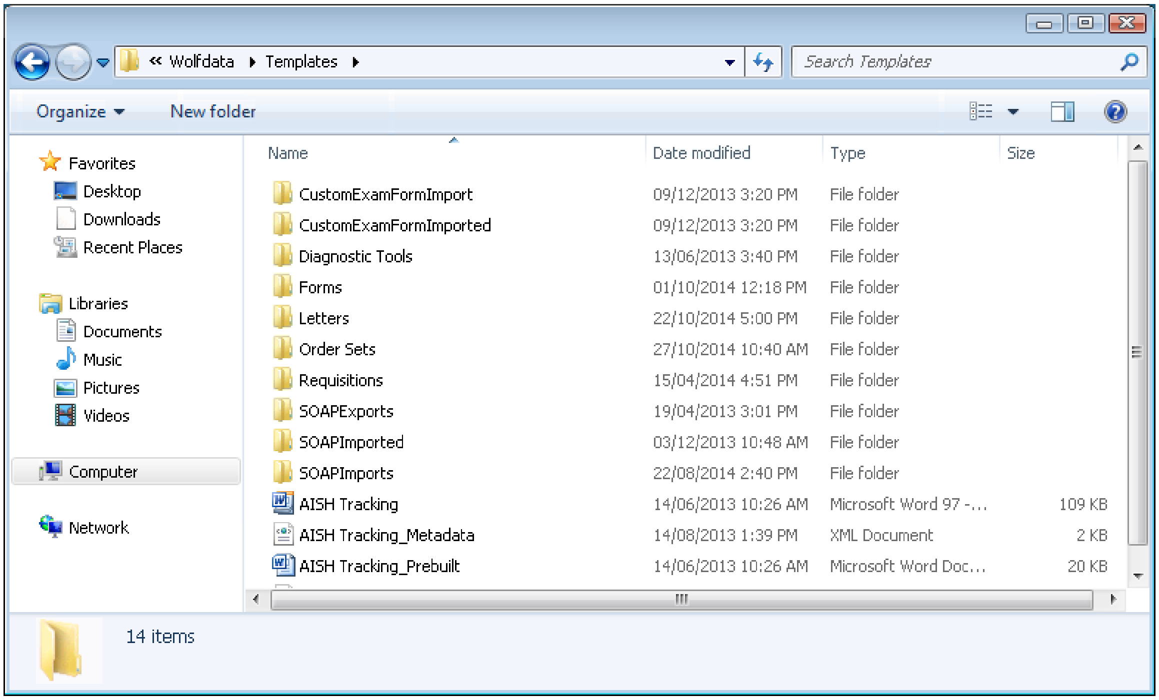
c) On the desktop of your remote computer, click **Start** ( ). The EMR displays the Windows Start Menu.

d) Click **Run**. Microsoft Windows displays the Run window.



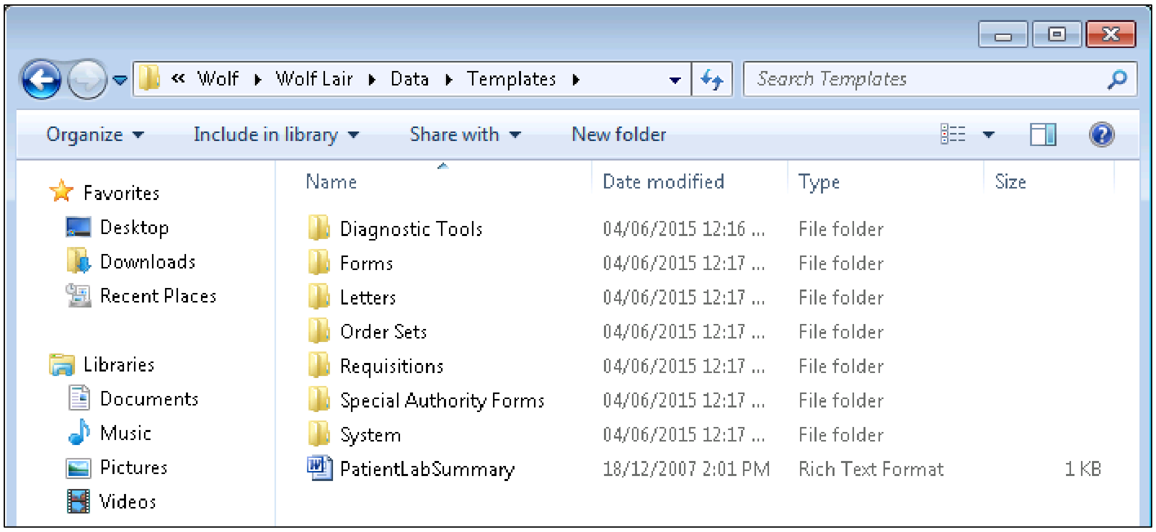
e) In the **Open** field, enter the folder location.

f) Click **OK**. Microsoft Windows displays your **User Templates** folder.



You can also open your User Templates folder by clicking **Start** > **Computer** > **W:** > **Wolf Data** > **Templates**.

2. If in the User Templates folder there is no Order Set folder, create an Order Set folder:
   a) In the Templates folder window, right-click.
   b) Click **New** > **Folder**. Windows creates a folder called “New Folder”.
   c) Rename the folder “**Order Sets**”.
3. On the window displaying the Template folder, click **Minimize** ( ). Windows minimizes the folder to the lower toolbar.
4. Open the Wolf Master Templates Directory:
   a) On the desktop of your remote computer, click **Start** ( ) and then, on the Start menu, click **Computer**.
   b) Click **Local Disk (C:)** > **Program Files (x86)** > **Wolf** > **Wolf Lair** > **Data** > **Templates**. Windows displays the Wolf Master Templates Directory folder.



5. In the Wolf Master Templates Directory, find the form you want.

The folder structure of the Templates folder mimics what you see when you select a SMART form in Wolf EMR. To find the form you want, double-click folders you would normally expand in Wolf EMR.

6. Copy and paste the form you want from the Wolf Master Requisition Directory to the User Templates Folder:

   a) In the Wolf Master Requisition Directory folder, search for and right-click the form you want to create an Order Set for.

   b) Click **Copy**.

There are four file types for each form. Ensure that you copy the **Microsoft Word 97-2003** Template ( ) file.

   c) Maximize the Document Templates Folder window (the window that you minimized in step 3.)

   d) On the Document Templates Folder window, double-click the **Order Sets** folder. The Order Sets folder opens.

   e) In the Order Sets folder window, right-click.

   f) Click **Paste**.

7. Rename the copied form to be more descriptive of its function (for example, “Male Diabetic over 50 Lab req”):

   a) In the Order Set folder window, right-click the form, and then click **Rename**.

   b) In the editable name field, enter the name you want.

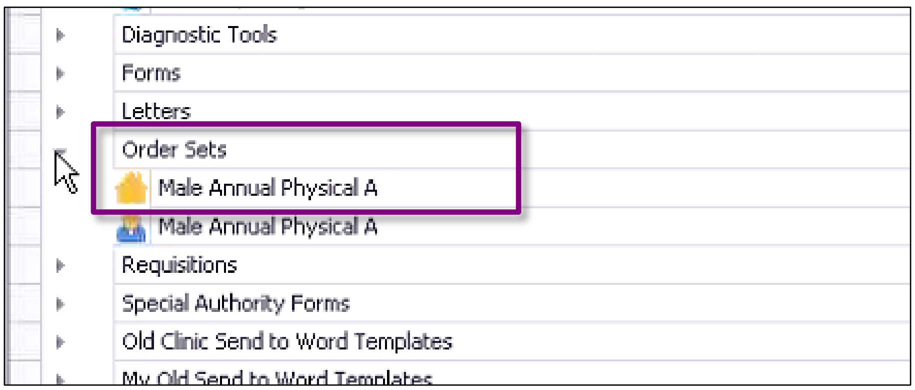
c) Click outside the name field to save the name.

8. To open and edit the renamed SMART Form, right-click the form's template file, and then click **Open**. The EMR opens the SMART Form in Microsoft Word.

9. Fill in the SMART Form (select check boxes and enter data into text fields) as you want the form to appear when opened from a patient's record.

> Most SMART forms released by TELUS Health are programmed to be restricted forms. On restricted forms you can edit only text fields and check boxes. You cannot edit any other aspects of the form unless you remove the form's restrictions first. See "Modifying SMART forms" on page 79.

10. When you finish, click **Save** ( ) or press <**Ctrl**> <**S**>. The EMR adds the customized Order Set to your user-specific SMART Forms list with a house icon beside the name.



> If the order set you just created is not available on your SMART Forms list, close the WorkDesk and re-open it.

Combining multiple forms into one order set

If you often use a complete set of forms for certain types of patient visits (for example, prenatal tests), you can combine multiple forms into one order set. To create a multi-form order set, you copy and paste the content from multiple forms into one Microsoft Word document.

To combine multiple forms into one order set:

1. Open your User Templates Folder and ensure an Order Set folder is available. See step 1 to step 2 in "Creating order sets" on page 72.

2. Open the Wolf Master Forms Directory and find the forms you want. See step 4 to step 5 in "Creating order sets" on page 72.

3. Copy the first form from the Wolf Master Forms Directory folder, and then paste the form in the Order Set folder of your User Templates folder. See step 6 in “Creating order sets” on page 72.
4. Rename the first form, using a name that describes the purpose of the order set. For example, “Prenatal exam forms”.
5. Repeat step 3 and step 4 for all other forms you want to add to the combined form. Rename each form with a similar name, but with an order number following each name.
6. Open the first SMART form template. In the User Template folder, right-click the Microsoft Word 97 – 2003 Template ( ) file for the SMART form, and then click **Open**.

- SMART forms have four files in the template folder. Always modify the Microsoft Word 97 – 2003 Template.
- **CAUTION**: Do not double-click to open and modify the form. Always right-click and then click **Open**. If you double-click the form to open it, any modifications you make are not saved.

7. If the SMART form has editing restrictions, remove the restrictions. See “Removing SMART form editing restrictions” on page 70.
8. Scroll down to the bottom of the SMART form, and then place your cursor below all form content, or on your keyboard, press <**Ctrl**>< **End**>.

If the SMART form is built in a table, ensure you place your cursor below the table.

9. On your keyboard, press **Enter** one or more times until Microsoft Word inserts a new page. Leave this form open.
10. Open the next form, and remove any editing restrictions. See step 6 and step 7.
11. Copy the form’s content, and then paste its contents on the new page of the first form:
    a) To highlight the entire form’s content, click anywhere in the form and then, on your keyboard, press <**Ctrl**><**A**>.
    b) Right-click the highlighted area, and then click **Copy**.
    c) On the new page of the first form, right-click, and then click **Paste**. Microsoft Word inserts the form’s content on the first SMART form.
12. Repeat step 8 to step 11 for all other SMART forms you want to include in the Order Set.
13. If there are identical bookmarks used in any of the combined forms, add renamed bookmarks as needed. See “Using the same bookmark multiple times on a SMART form” on page 65.

> A bookmark name can be used only once in a single form. If there are multiple instances of the same bookmark, only the first instance remains while all the other instances disappear automatically.
>
> You can re-enter the bookmark where needed using the bookmark name followed by a unique number.

14. When you finish, restrict the form to be fill-in only. See “Restricting SMART forms to be fill-in only” on page 69.
15. Click **Save** ().
16. In your User Templates folder, delete all Microsoft Word templates you copied and pasted in step 5.

Modifying SMART forms

You can edit any SMART form, even if it is provided by TELUS Health. Common edits include:

- Changing bookmarks (for example, to pull Family Practitioner details instead of Consultant details)
- Updating the form company contact details (for example, if a diagnostic imaging company changes their location)

When you modify a form that is originally provided by TELUS Health, you save the edited form as a “house” form. You cannot modify the centralized form on the Wolf EMR data center. House forms are forms that have been created or modified by your clinic. These forms are not maintained or updated by TELUS Health.

If you want to modify only certain check boxes, text fields, and drop-down lists so that they are pre-filled-in with information, see “Order sets” on page 72.

To modify a SMART form:

1. Complete one of the following actions:
   - If you are modifying a SMART form that your clinic produced or modified, open your User Template folder and find the form. See step 1 in “Creating order sets” on page 72.
   - If you are modifying a Wolf-provided SMART form, copy the form from Wolf Master Directory folder, paste the form in your User Template folder, and rename the form. See step 1 to step 7 in “Creating order sets” on page 72.
2. In the User Template folder, right-click the Microsoft Word 97 – 2003 Template ( ) file for the SMART form, and then click **Open**.

   - SMART forms typically have four files in the template folder. Always modify the Microsoft Word 97 – 2003 Template file.
   - **CAUTION**: Do not double-click to open and modify the form. Always right-click and then click **Open**. If you double-click the form to open it, any modifications you make are not saved.

3. If the form currently has editing restrictions, remove the restrictions. See “Removing SMART form editing restrictions” on page 70.
4. Modify the SMART form content as needed:
   - If you are modifying a letter SMART form, see “Creating SMART forms for letters” on page 27.
   - If you are modifying a requisition form or other entry form, see “Creating SMART forms for requisition forms and other entry forms” on page 35.
5. When you finish, at the top of the window, click **Save** ( ).

Troubleshooting SMART forms

Why, since our Wolf EMR has been upgraded, do some SMART forms not work properly?

Answer: If you were upgraded from a Wolf EMR version older than 2010, some bookmarks, fonts, and checkboxes have changed, and no longer work in newer versions of Wolf EMR. Consider creating a new form from scratch, or at a minimum replacing the bookmarks, check boxes, and fonts that no longer work properly.

Why is my bookmark is not pulling in any data?

Answer:

a) Check the spelling of the bookmark. Also, when you insert bookmarks try copying and pasting the bookmark from Wolf EMR Online Help into Word (to prevent typos).

b) If the bookmark is spelled correctly, refer back to the patient's record and ensure that the data is present for the patient.

c) Has the same bookmark been used more than once on the same SMART form? A bookmark name can be used only once in one document. See "Using the same bookmark multiple times on a SMART form" on page 65.

d) If the bookmark is for a specific lab value (for a lab result that comes in electronically), and the bookmark is spelled correctly, Wolf EMR may not recognize the associated lab code. To learn more on how to program Wolf EMR to recognize a lab code, in Wolf EMR Online help, search the topic "**Merge Codes**".

When I use a SMART form, why can't I select the check boxes?

Answer: The form is likely not set to be fill-in only. Open the SMART form template from its stored location, and then set the form to be fill-in only. See "Setting SMART forms to be fill-in only" on page 68.

When I create SMART forms, why can't I see where bookmarks are inserted?

Answer: You must enable Microsoft Word to show bookmarks. See "Setting up Microsoft Word to show bookmarks" on page 24.

When I go to save a modified SMART form, why am I forced to save the SMART form with a new name?

Answer: When you open a SMART form to edit its contents, you must right-click the Microsoft Word 97 – 2003 Template and click **Open**. Do not double-click the template file to open it or you cannot save the changes you make (unless you save it as a new file).

End of Module

Questions?

WolfEMR.support@telus.com

1-866-879-9653 (Option 1)

Community Portal at telushealthcommunity.force.com/wolfcommunity

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