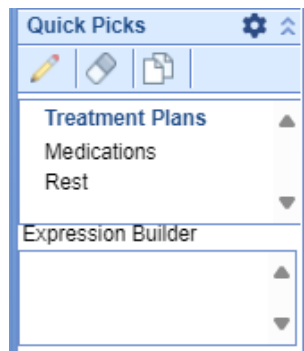# Quick Picks

Last Modified on 08/30/2024 10:21 am EDT

About EMR Quick Picks

Quick Picks are a function within the EMR portal that allows a user to create stored text or expressions that can be applied to any free text box or text area within the EMR portal. Generally this text is used for documentation purposes within a template. An example would be to have a common treatment plan phrase stored, that would then be copied and pasted to a free text area within the Treatment Plan template.
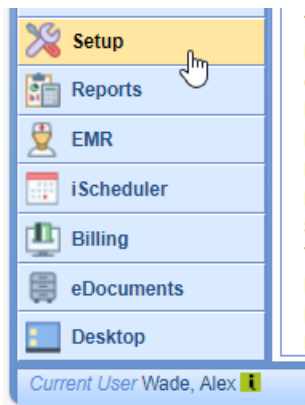
The Quick Pick builder allows a single user to create common phrases that can only be accessed by that user. Quick Picks can not be shared amongst multiple users.
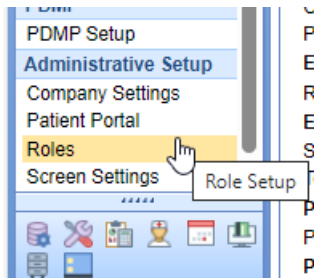

Accessing Quick Picks

Access to the Expression builder is controlled by the role titled, "Quick Picks." Access may be determined by an administrator.
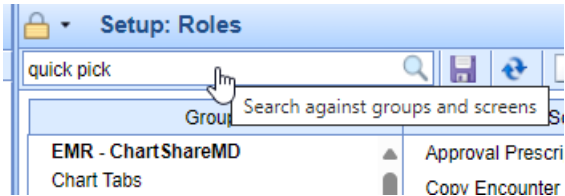
1. Navigate to Setup

2. Location Administrative Setup > Roles
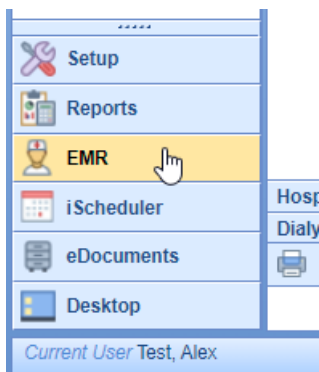
3. Search "quick pick"

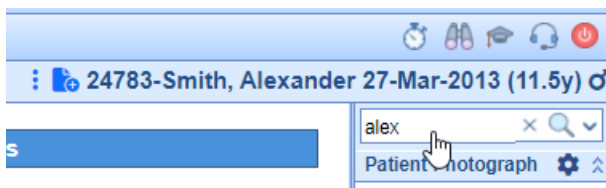4. Determine write access by granting access to various user roles

Users may determine whether the Quick Pick builder is displayed on their right navigation pane in the EMR, using various user display settings.
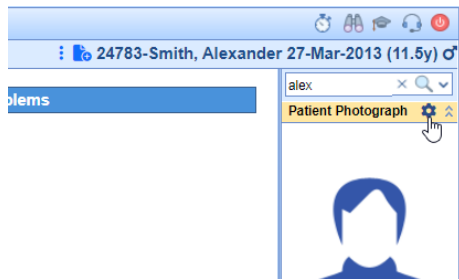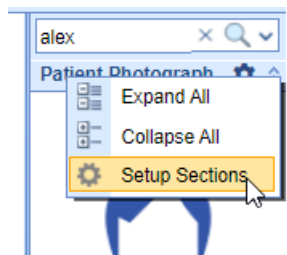
1. Navigate to the EMR

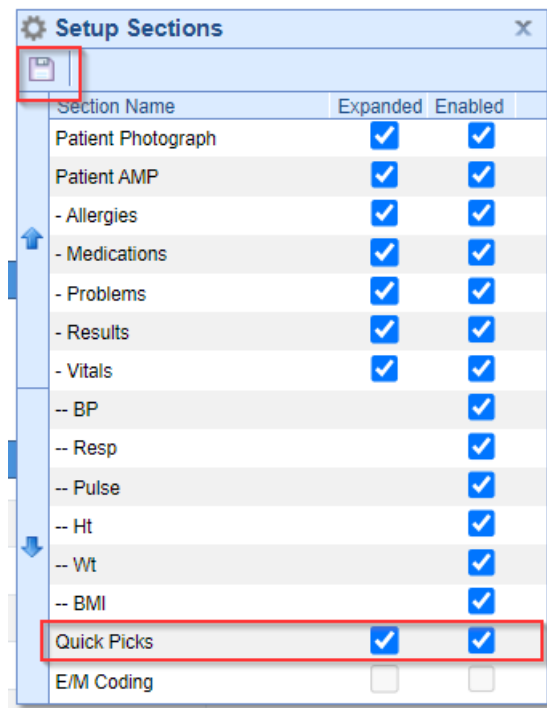2. Begin by opening a patient either by searching or selecting a scheduled appointment

3. Select the gear icon in the Patient Photograph bluebar
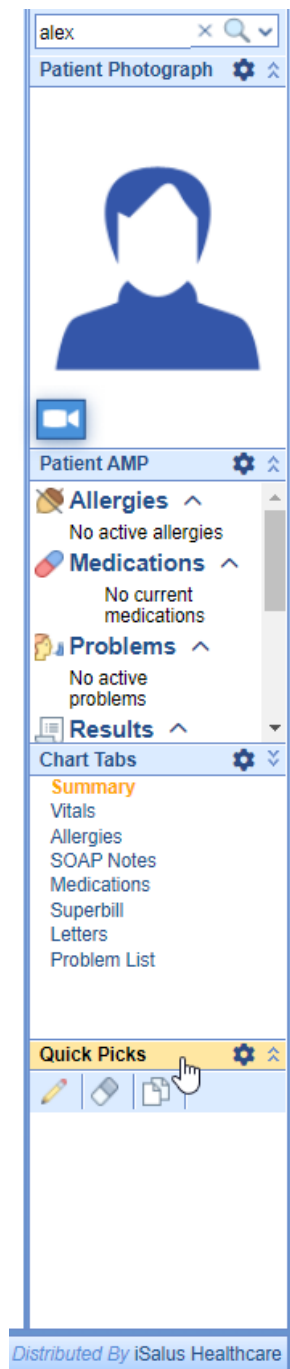

4. Choose Setup Sections

5. Choose Enabled (and expanded if you wish to have the tool open all the time)
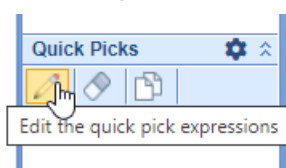

6. Choose Save

The Quick Pick builder will now be displayed at the bottom the right navigation pane in the EMR.
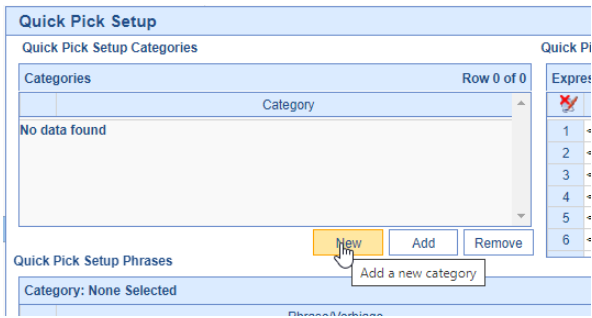

How to Create Quick Picks
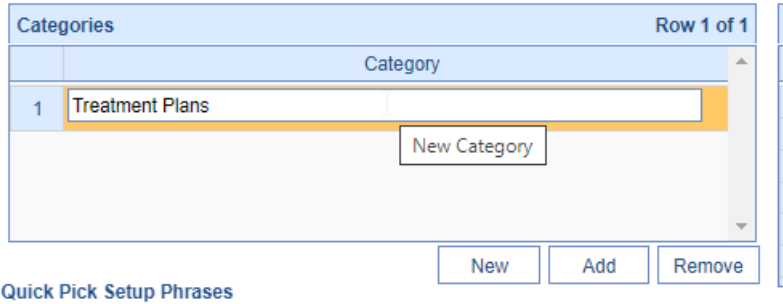
Quick Picks are displayed by categories.

1. Select the pencil icon

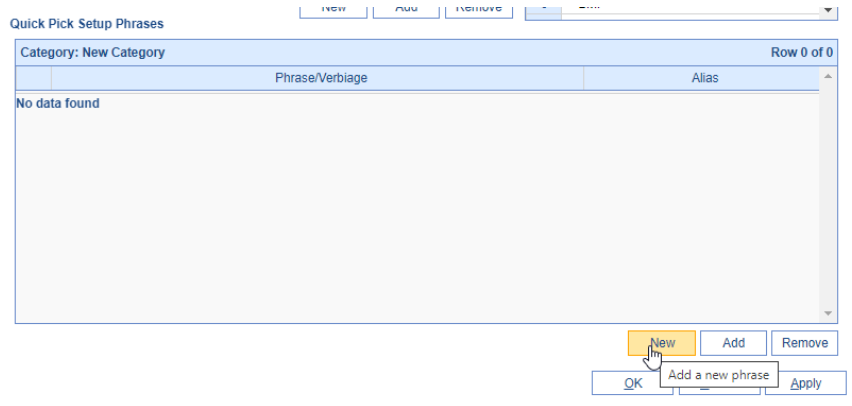2. Select the New button to generate a new category
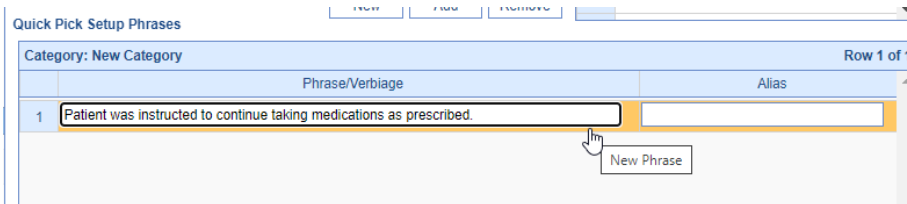
3. Type in the desired category name

Phrases are then built under designated categories.
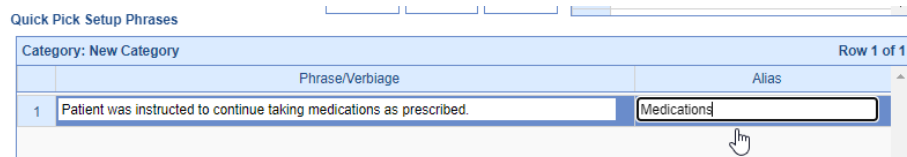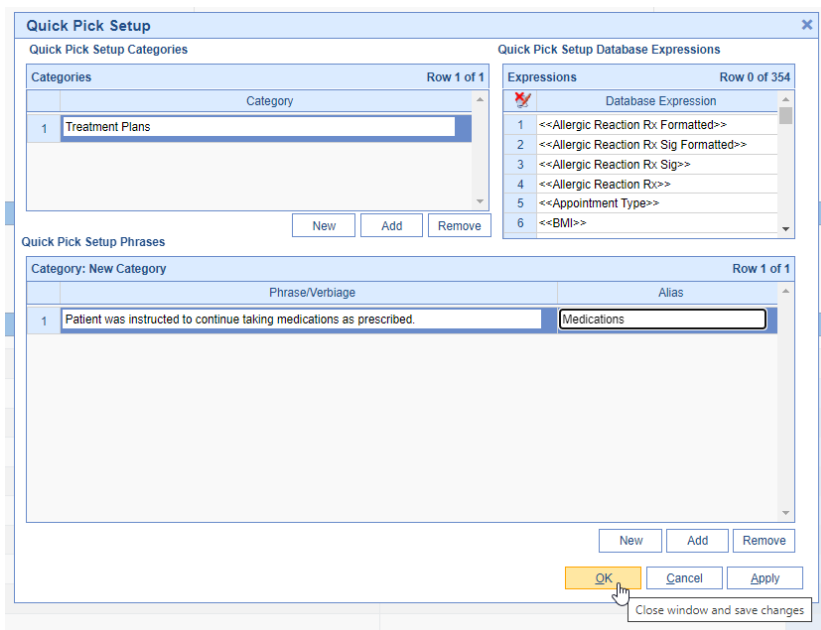
1. Select the New button

2. Enter the desired phrase *(This is what will be pasted)*

3. Enter a brief alias that describes the phrase *(This is what is displayed in the Quick Picks menu)*
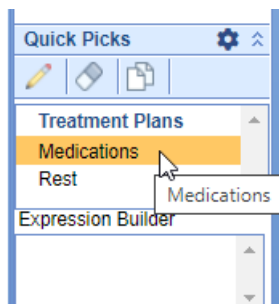

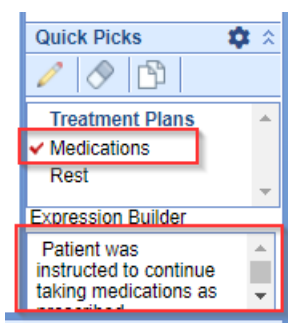4. Select OK to save changes and close window

How to use Quick Picks

Quick Picks can be used independently or can be grouped together to form phrases.
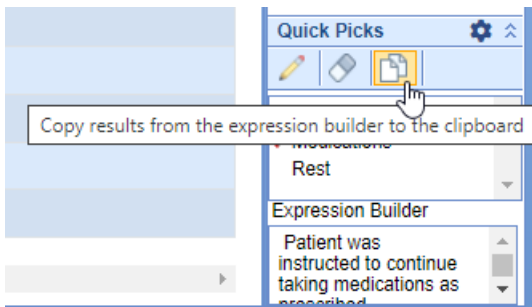
1. Begin by single selecting the desired phrase *(to group phrases, select the desired phrases)*

2. Selected phrases will display in the expression builder

3. User may choose to make edits to the expression builder before copying
4. Select the copy button to copy the text to your clipboard

5. Navigate to the desired area to paste and use 'Ctrl + V' to paste