How to create auto text in Cerner

This guide shows you how to create auto text in Cerner, so you can insert a saved phrase into your notes with a short label. You will create a personal phrase, customize its formatting, add a token and a drop-down list, and then save your changes and exit Cerner correctly.

Prerequisites

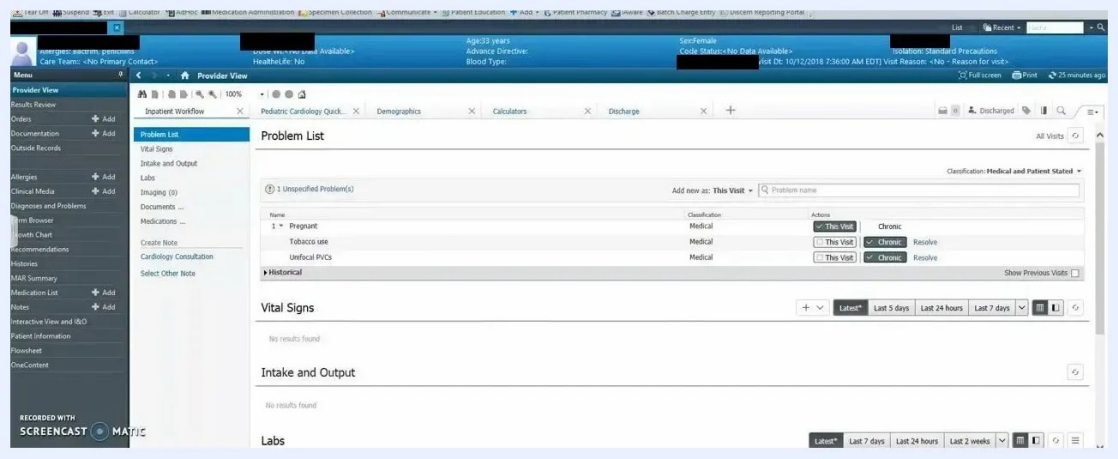
- Access to a test patient chart where you can practice, such as "MSMTEST, SUNSHINE".
- Access to the **Documentation** area so you can open a blank note.

Create a personal auto text phrase

Step 1: Open a test patient chart

Search for a test patient to practice creating auto text. For example, use the patient "MSMTEST, SUNSHINE".

Confirm that the MRN (Medical Record Number) appears at the top of the chart. Then open the patient chart to the main workflow screen.



Patient chart open for MSMTEST, SUNSHINE, with the MRN and patient details at the top and the Problem List, Vital Signs, Intake and Output, and Labs sections visible

Step 2: Open a blank note

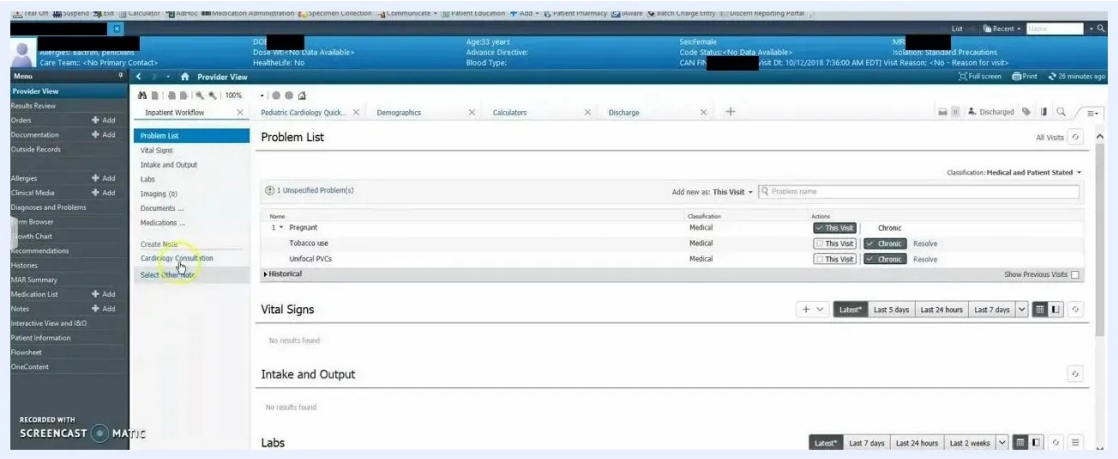
In the left navigation menu, select **Documentation**, and then click **Add** to start a new note.

Choose **Free Text Note** or the note type that fits your workflow. A blank note editor appears in the main window.

Step 3: Open the Manage Auto Text tool

To start creating auto text in Cerner, find the **Manage Auto Text** icon at the end of the toolbar in the note editor. Hover over the icon to confirm its label.

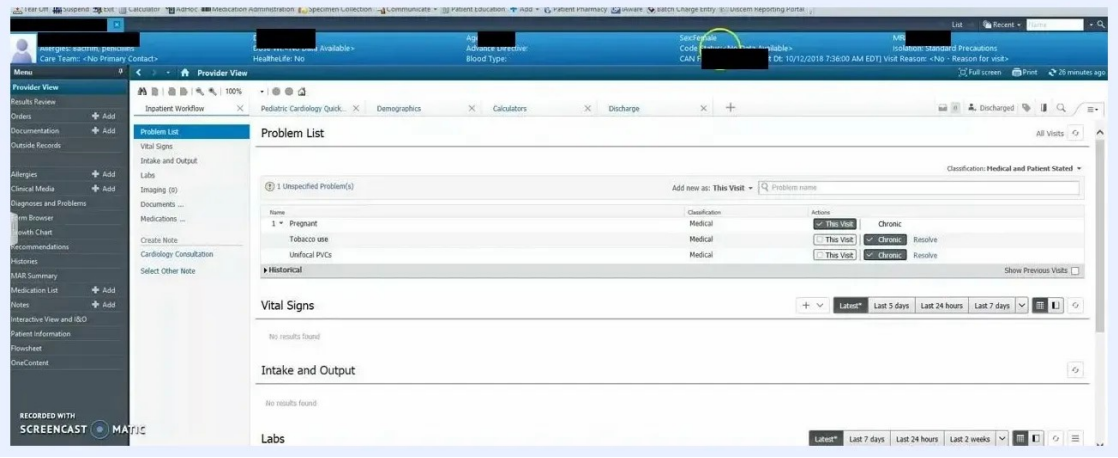
Click the **Manage Auto Text** icon to open the management window.



Blank note editor with the cursor hovering over the Manage Auto Text icon in the toolbar

Step 4: Start a new phrase

In the **Manage Auto Text** window, make sure you are on the **My Phrases** tab. Then click **+ Add New Phrase** to begin a new auto text.



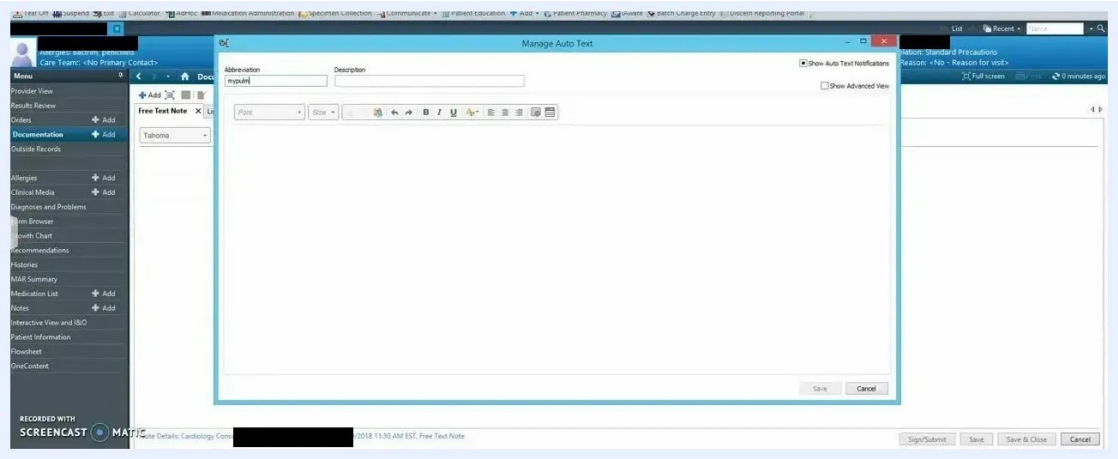
Manage Auto Text window showing the My Phrases tab and the Add New Phrase button

Step 5: Enter an abbreviation and description

In the **Abbreviation** field, enter a short, memorable label for your phrase. This label is private to your profile, and no one else sees it.

In Epic, abbreviations must start with a period (for example, .myphrase). In Cerner, you can use any label, such as mpulmhytndisc.

In the **Description** field, enter a brief explanation of what the phrase is for, such as pulmonary hypertension discussion.

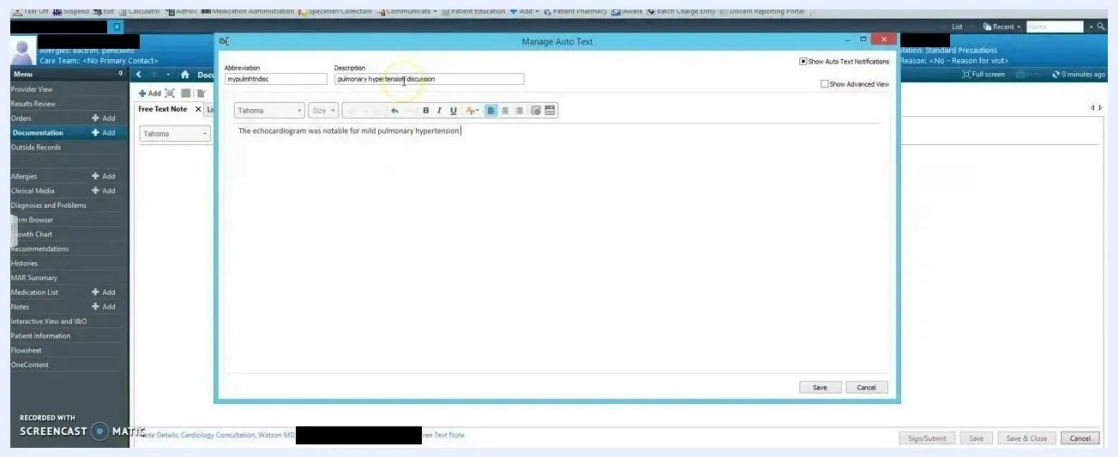


Manage Auto Text window with the Abbreviation and Description fields filled in, ready for phrase text

Step 6: Enter the auto text content

In the large text box, type the full text you want Cerner to insert when you use this phrase. For example:

The echocardiogram was notable for mild pulmonary hypertension



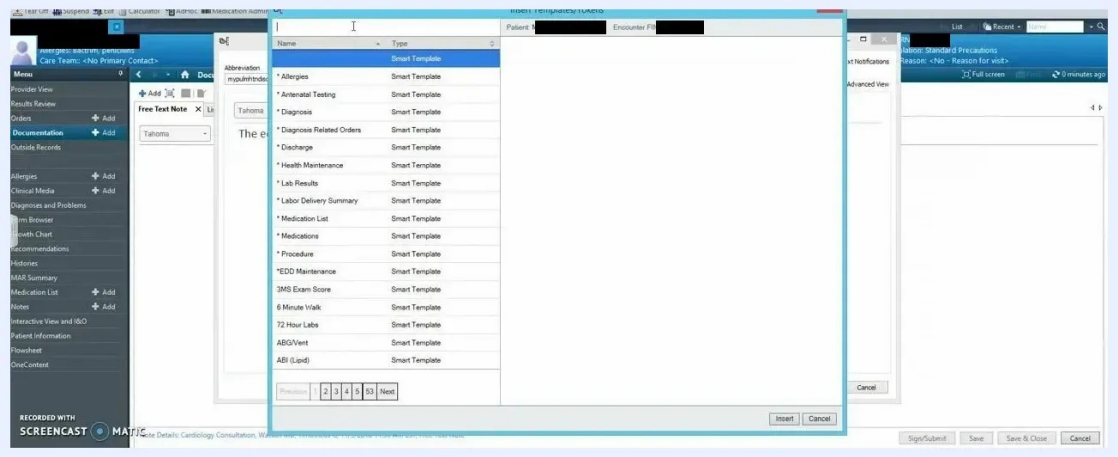
Manage Auto Text window with the abbreviation, description, and example phrase text entered

Customize your auto text phrase

Step 7: Change the font and font size

Highlight the text you want to change in the auto text editor.

- Click the **Font Name** drop-down menu to choose a different font, such as Arial, Calibri, or Tahoma.
- Click the **Font Size** drop-down menu to choose a size, such as 14, 16, or 18.



Manage Auto Text window with the font and font size drop-down menus open for the highlighted text

Step 8: Apply text formatting

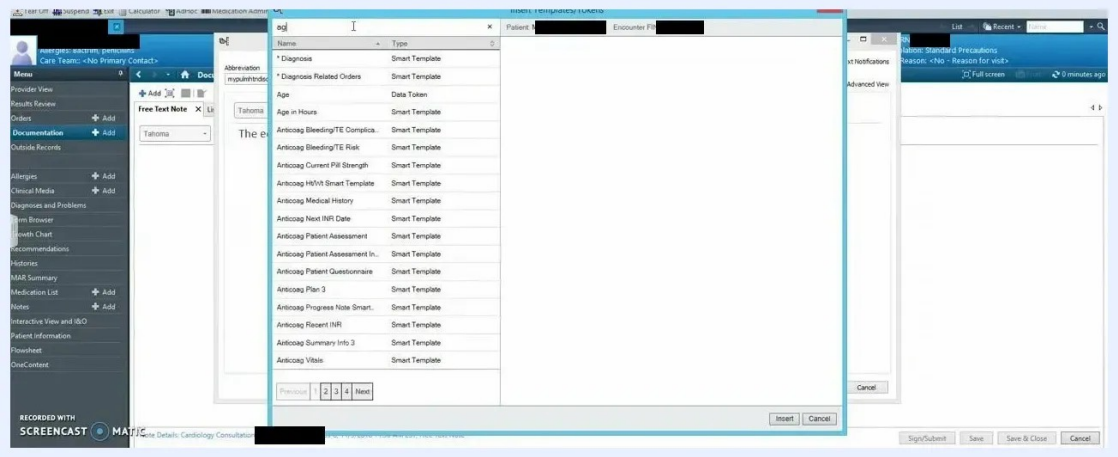
Use the toolbar buttons to apply **Bold**, **Italic**, or **Underline** to the selected text as needed.

Step 9: Insert a template or token

Click the **Insert Templates/Tokens** button. Its icon resembles a document with a gear.

In the **Insert Templates/Tokens** window, search for a token (for example, "Age") or a template. Select a token such as **Age** to add dynamic patient information to your phrase.

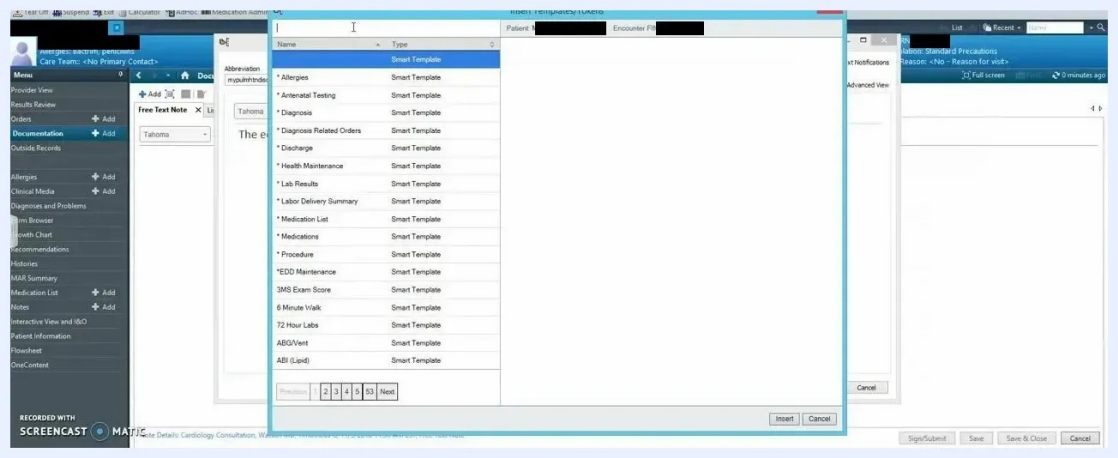
Review the preview to see how the token will appear in your auto text. Then click **Insert**.



Insert Templates/Tokens window with the search bar and a list of available smart templates and data tokens

Step 10: Verify the token

Confirm that the token, such as [Age], appears in your auto text phrase where you want it.

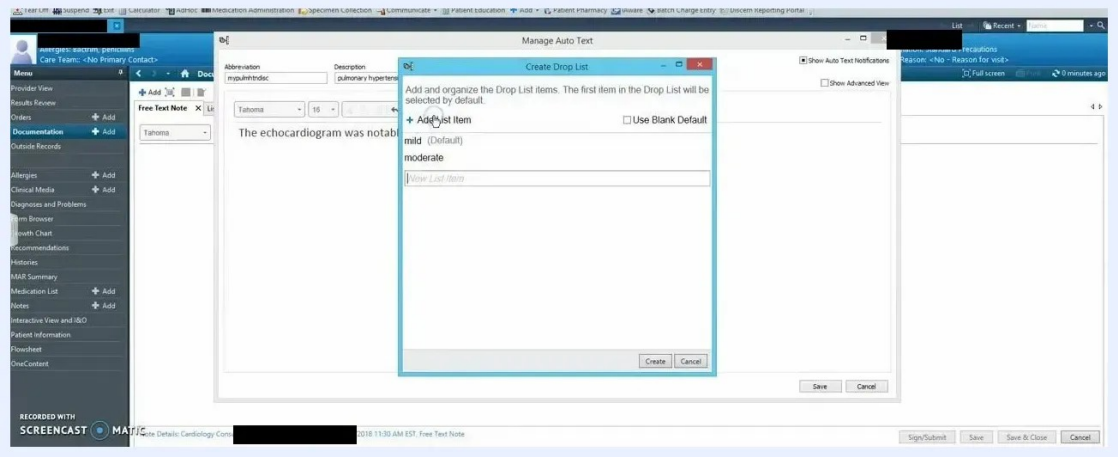


Manage Auto Text window showing the inserted Age token in the phrase

Step 11: Create a drop-down list for variable text

When part of your phrase changes from note to note, replace it with a drop-down list. First, delete the static text you want to replace. For example, delete "mild" from "mild pulmonary hypertension".

Click the **Create Drop List** button in the toolbar. In the **Create Drop List** window, click **+ Add List Item** to add each option, such as "mild", "moderate", and "severe". The first item you enter is the default selection unless you change it.



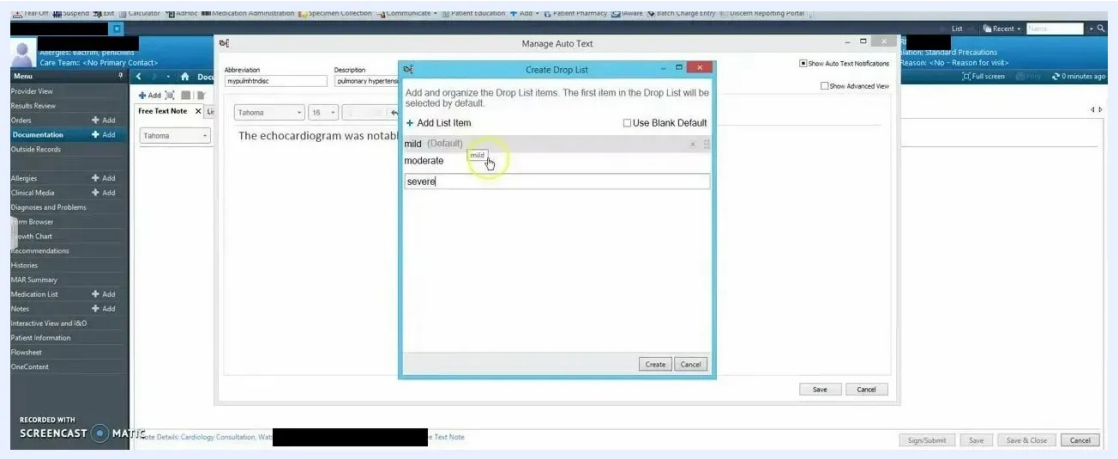
Create Drop List window with "mild" and "moderate" entered as list items

Step 12: Set the drop-down default

Choose how the drop-down behaves when you use the phrase:

- To keep the first item (for example, "mild") as the default, leave the **Use Blank Default** box unchecked.
- To start with a blank selection, check the **Use Blank Default** box.

Click **Create** to insert the drop-down list into your auto text phrase.



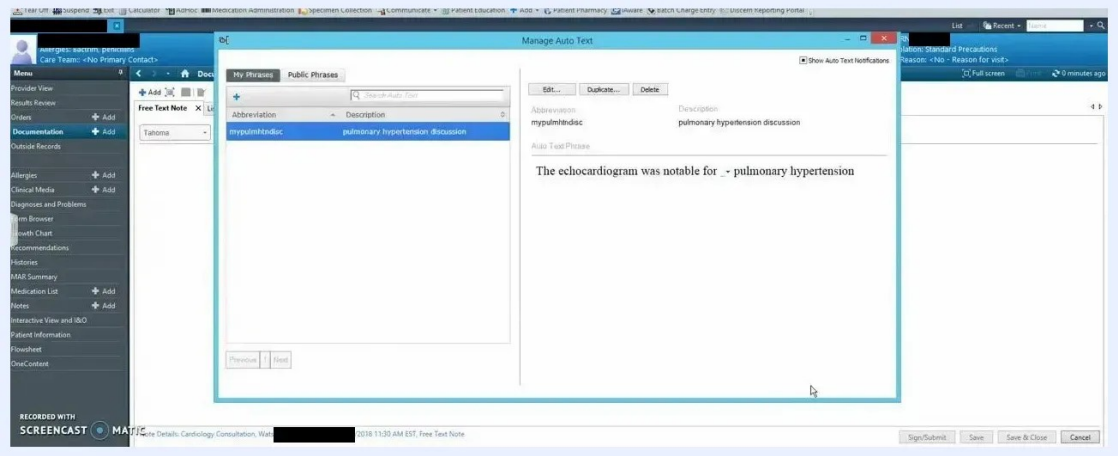
Create Drop List window with "mild", "moderate", and "severe" entered and the pointer near the Use Blank Default option

Save your phrase and exit Cerner

Step 13: Save the updated phrase

Confirm that your phrase now includes the drop-down list in the right place. For example: "The echocardiogram was notable for [drop-down] pulmonary hypertension".

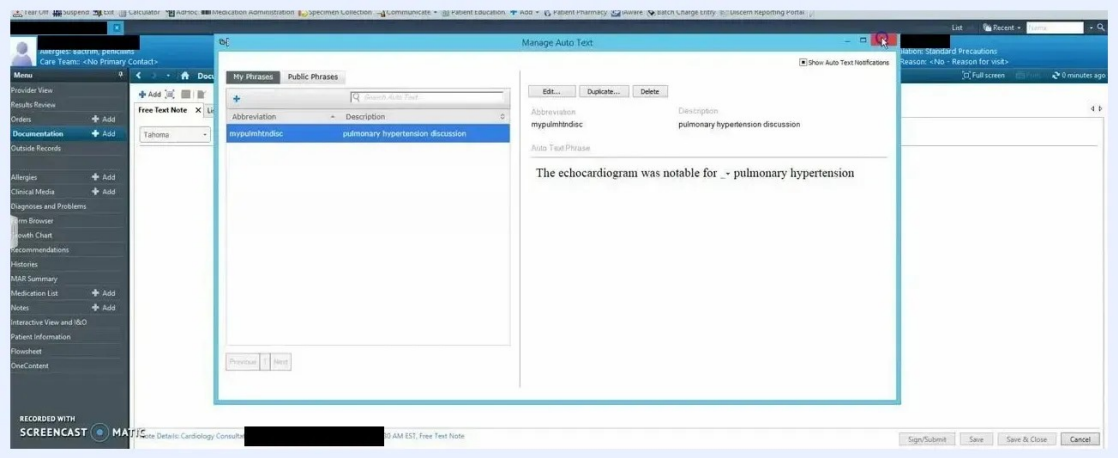
Click **Save** in the **Manage Auto Text** window to save your changes.



Manage Auto Text window showing the updated phrase with the drop-down inserted, ready to save

Step 14: Exit Cerner with the Exit button

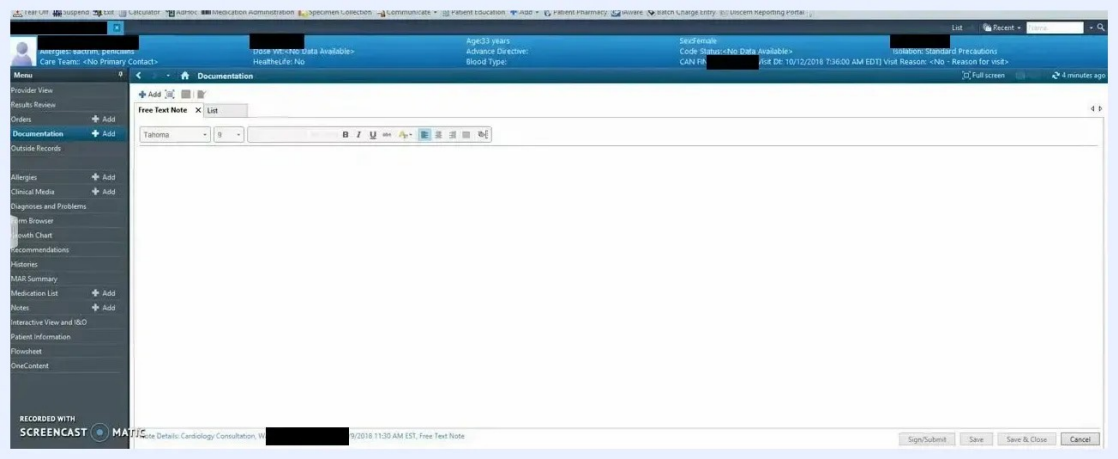
Do **not** close Cerner by clicking the red "X" in the upper right corner. Instead, click the **Exit** button within Cerner. This ensures Cerner saves all changes to your personal profile, including new or edited auto text.



Cerner main screen with the application window and the red X highlighted as the control not to use for exiting

Step 15: Complete any save prompts

If Cerner prompts you with additional save dialogs, such as **Save Note**, complete them. Select the appropriate note type (for example, "Cardiology Consultation"), confirm the author and date, and click **OK**.



Save Note dialog showing the Type, Author, Title, and Date fields

Summary

You now know how to create auto text in Cerner, from a basic phrase to one with a token and a drop-down list. Always exit Cerner with the **Exit** button so your custom phrases are saved to your profile and available for future documentation.

What's next

- Practice adding other tokens or templates to your phrases with **Insert Templates/Tokens**.
- Add more drop-down lists to phrases that vary from patient to patient.
- Use your abbreviation in a new note to confirm the phrase inserts as expected.