If you routinely create documents with the same sections of content arranged in the same order, or you regularly dictate the same paragraphs of text, you can capture and reuse this content by saving it as a Standard. Standards may consist of a single paragraph, section headings, multiple paragraphs and headings, or entire document. They may include fields that you can fill in to complete a document. They are also known as "Standards," "canned documents," "templates," "macros," or "normals".

Note: You must have a document open in the Document Editor for editing in order to create, update, or delete Standards.
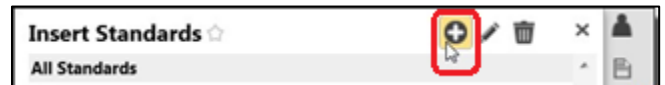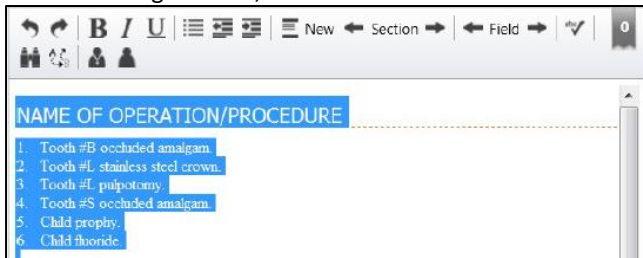
Creating Standards

After dictating a document, you can create from any or all content in a document. For example, you could create a Standard consisting of the entire document itself, or a specific section of the document, or even an individual paragraph in the document. Once saved as a Standard, the content is available for you to insert into new documents.
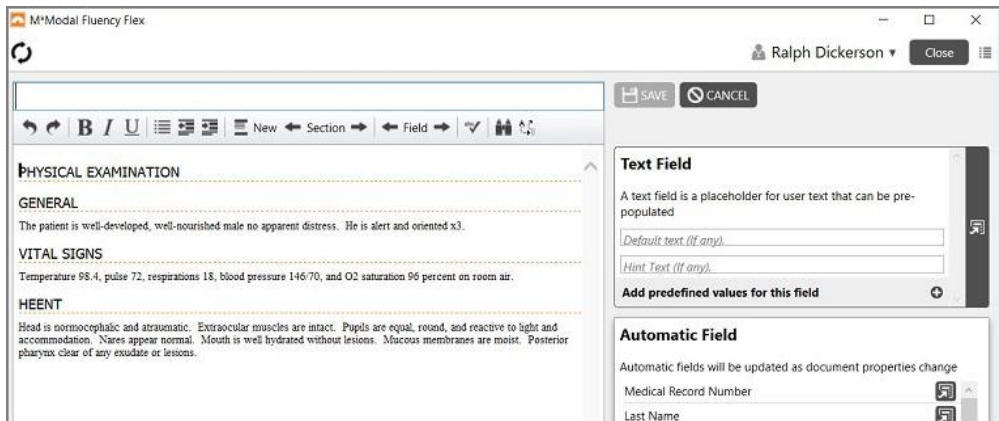
1. While creating or editing a document with the Document Editor, click **Show / Hide Standards** to open the Insert Standards panel:

2. In the editor text window, select the text you want to use to create a new Standard with your mouse, like picture 1 below.
3. After selecting the text, click the Create Text Standard icon on the Insert Standards toolbar, like picture 2 below:

- The standard creation window opens over the Document Editor, like the following picture below:
    - Fluency Flex copies all selected text from the existing text box into the standard creation window
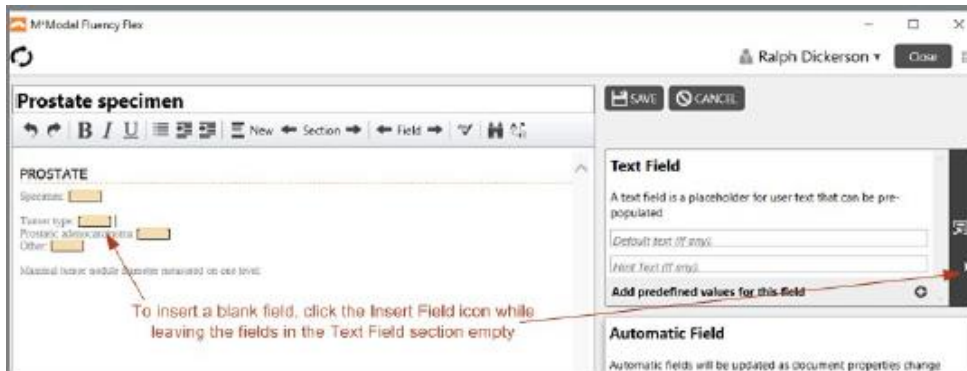

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4. Type a title for the Standard you are creating in the Enter standard name field.
5. Next, modify the content of the Standard as required. For example, you can remove sections or paragraphs, format text, or modify lists.
6. If desired, you can add fields in a standard as placeholders for oft-repeated information. For example, if you routinely include a date of birth in your documents, you could add a "date-of-birth" field that Fluency Flex automatically populates with a patient's birth date from his or her medical record. The following sections explain how to insert fields in your Standards.

Inserting Text Fields

Type	Description
Blank text fields	Add blank fields when you want to supply any type of content for the field.
Text fields with instructional messages	Add text field with instructional messages when you want to explain how to complete the field
Text fields for selecting a single option	There may be times when you want to provide two or more selectable options for a text field. For example, a field could require a Yes or No selection. When you add selectable options to a text field, you can click the field to select the appropriate option.
Text fields for selecting multiple options	You can add text fields that you can use to select multiple options. When selected, they appear as a bulleted list in the body of the document.

To Insert a Blank Text Field:

1. Click where you want to insert a blank text field in the Standard.

2. While leaving the fields in the Text Field section empty, click the Insert Field icon:

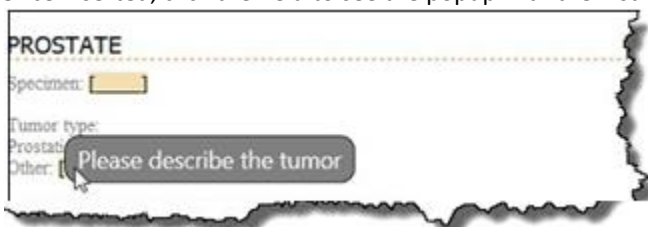   - Fluency Flex inserts a blank field in the standard.

To Add an Instruction to a Text Field:

1. Click where you want to insert a field with an instructional message in the standard.

2. In the Text Field section, type the message in the **Hint Text** field:

3. Click the **Insert Field** icon to insert the field at your cursor's location in the standard:
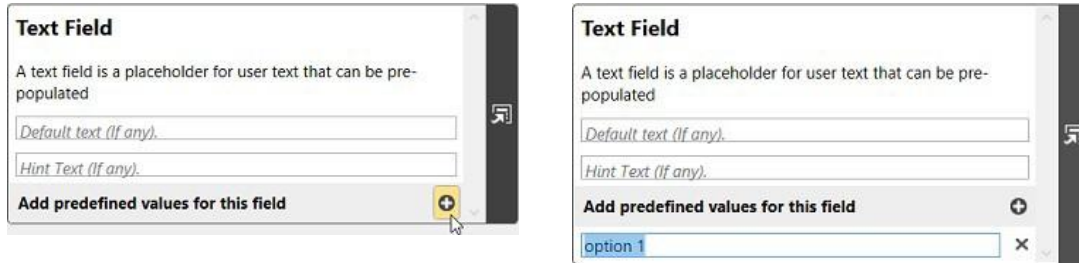

4. To save the new field and complete the standard creation or editing process, click **Save**. Fluency Flex returns to the body of the document.

5. To test the new field, insert the standard in the document.

6. Once inserted, click the field to see the popup with the instructional message, like the following example:

To Add Text Field for Selecting a Single Option:

1. Start the process by either creating a new standard, or editing an existing standard.
2. Click where you want to insert a field with selectable options in the standard.
3. In the **Text Field** section, click **Add predefined values for this field**
4. An option box appears at the bottom of the section, like the following example.
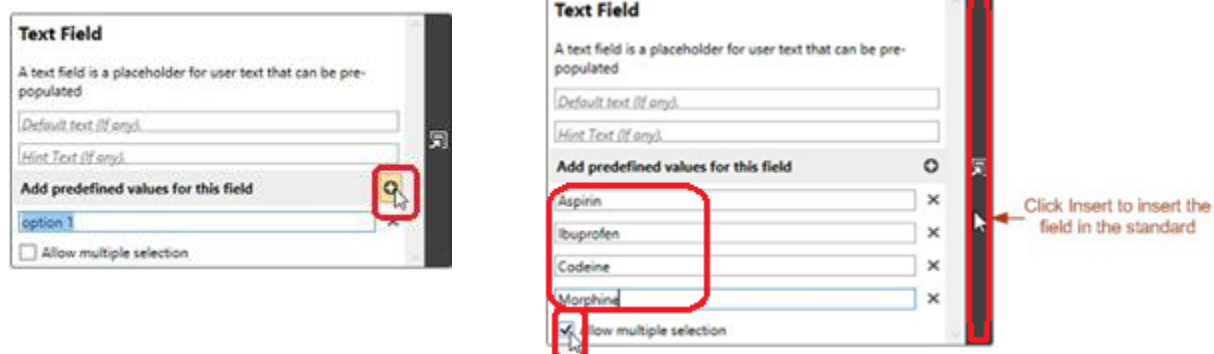

5. Type the text for the first option you want to associate with the field in the box. For example, if you wanted to make "Yes" a selectable option for the field, type Yes in the box.
6. To add a second option to the field, click **Add predefined values for this field** again to add another box below the first. Type the text for the second option in the new field.
7. Repeat step 5 as many times as required to add all selectable options to the field:
8. Note that you can pre-fill the field with a selection when required. Type the text to pre-fill the field in the Default text (if any) box:
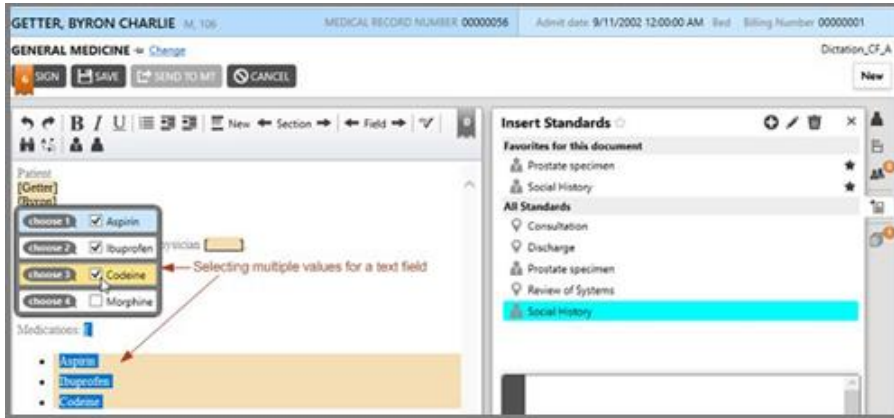

9. To save the new field and complete the standard creation or editing process, click **Save**. Fluency Flex returns to the body of the document.
10. To test the new field, insert the standard in the document.

To Add a Text Field for Selecting Multiple Options:

1. Start the process by either creating a new standard, or editing an existing standard.
2. Click where you want to insert a field with selectable options in the standard.
3. In the Text Field panel, click **Add predefined values for this field** to start adding values to the field:
4. Repeat step 3 to add all required values. When complete, click **Allow multiple selection**:
5. Click **Insert** to insert the new field at your cursor's location in the standard:

6. Finally, click **Save** to save the new field with multiple, selectable values in the standard.

7. When inserted in the body of a document, Fluency Flex allows you to select multiple values for the field, which appear as a bulleted list like the following example:
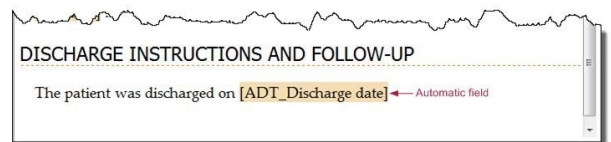

Inserting Automatic Fields

An automatic field is a field Fluency Flex populates with data from the patient record associated with a document. For example, if you routinely a patient's age in your documents, you can insert an automatic field and Fluency Flex will populate it for you.
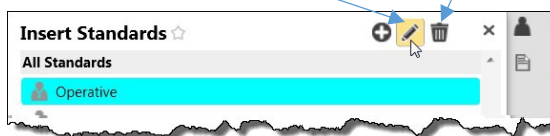
To insert an automatic field:

1. Place your cursor where you want to add the automatic field in the standard.

2. In the Automatic Field section, locate and click Insert icon on the Automatic Field option you want to insert in the standard.

3. Fluency Flex inserts the automatic field at your cursor's location in the document, like below.

Edit & Delete Standards

1. From the Standards panel, locate and click the Standard you want to **Edit** or **Delete** in the All Standards section.

2. Click the **Edit Selected Standard** or the **Delete Selected Standard** on the toolbar:

NOTE: If you editing the Standard, don't forget to **Save** your changes.

SAMPLE STANDARD UTILIZING ALL FIELD TYPES

CHIEF COMPLAINT
[Bethany] presents today for evaluation. [   ]

HISTORY OF PRESENT ILLNESS
[   ]

ADT Field – The information will be pulled in automatically from the ADT

PAST MEDICAL HISTORY
[   ]

Blank Fields – Freely dictate text or lists

MEDICATIONS
[   ]

ALLERGIES
[The patient has no known allergies.]

Text Fields – Prepopulate with normal or standard text. If no changes are needed, simply navigate to next field and leave as is. If changes are required, navigate to the field and begin dictating—your dictation will replace the prepopulated text

PHYSICAL EXAMINATION
GENERAL APPEARANCE: [The patient is alert, oriented, and in no acute distress.] [Normocephalic, atraumatic.] NECK: [Supple without lymphadenopathy.] HEART: to auscultation and percussion without rales, rhonchi, wheezing or diminished breath so nondistended with good bowel sounds heard. Inguinal area is normal.] EXTREMITIES NEUROLOGICAL: [Gross nonfocal. Skin: Warm and dry without any rash. There is no costovertebral angle tenderness.]

ASSESSMENT
[   ]

RECOMMENDATIONS
choose 1: ☐ Outpatient Rehabilitation
choose 2: ☐ Inpatient Rehabilitation

[Bethany] is being referred for [   ] Services.

It was a pleasure seeing [Bethany] in the office today. Thank you for the referral of this
He / She
[   ] will return to our office for evaluation in one month.

Predefined Value Field – User is provided with specific options to choose from. Options can be chosen by using mouse click or their voice.

Hint Text Fields – A hint is provided to the user as they navigate to this field to indicate what type of information should be dictated in the field.

Canned Text – Insert standard text that you want to appear on all of your documents. Canned text can be deleted or edited in your current document with speech recognition or by the keyboard