

SmartTags – The Basics

SmartTags is a **Microsoft Word** utility that enables your patient's data to be merged into **Word** templates.

Some **Vision 3** provided **Word** templates are set up to use **SmartTags** to present patient information in a **Word** document, for example, the Dementia Care Plan.

If you have a managed server, for example, AEROS or WES, **SmartTags** is already installed for your use, if you have your own server, you must install **SmartTags** in order to use them.

 See [Installing SmartTags](#) on page [1](#) for details.

Installing SmartTags

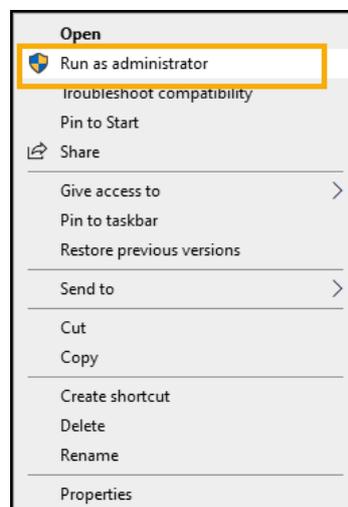
You only need to install **SmartTags** once at your practice, as it is saved in the O:\ drive which is accessible from any **Vision 3** machine.

 **Note** - To install and run the **SmartTags** utility, you must be logged on to your network as a systems administrator.

Own Server only

To install **SmartTags**:

1. [Click here to download SmartTags3.exe](#).
2. Save the **SmartTags3.exe** to **O:\PROGRAM**.
3. Now, right click on the file and select **Run as administrator**:



The **SmartTags** utility is now installed.

Own and Managed Servers

You can open any existing **SmartTags** document and using Save As create a new document, or you can use our Blank version to get started, this makes the creation of your own templates much simpler.

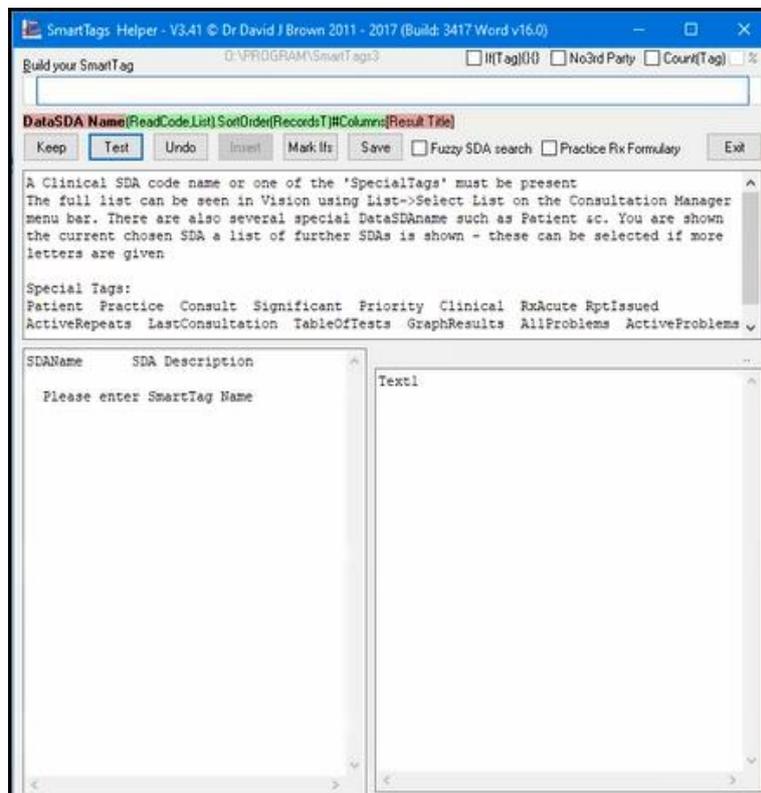
To download the blank **SmartTags** example:

1. [Click here to download the simple Blank\(SmartTags3x4\) document.](#)
2. Save the document to **P:\WORDPROC\TEMPLATE**.



Training Tip - To make templates with **SmartTags** easier to find, you may want to create a **SmartTags** folder within **P:\WORDPROC\TEMPLATE** and add the **Blank(SmartTags3x4).doc** and any **SmartTags** templates you create to that.

3. From where you have saved **Blank(SmartTags3x4).doc** double click it to open.
4. You may see the following:
 - A prompt to Enable Macros, select **Yes**.
 - A prompt to run P:\Wordproc\Template\MMRefer.txt, select **Yes**.
5. You should now have a **SmartTags** option above your toolbar, if this does not display, select **View - Macros - ShowTagsHelp**.
6. The **SmartTags Helper** screen displays:



You are now ready to start creating **SmartTags** templates for use in your practice.

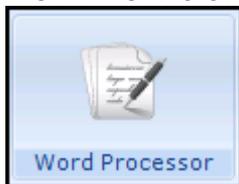
Creating a Basic SmartTags Template

The following details how to create a basic **SmartTags** template for use with **Vision 3**:

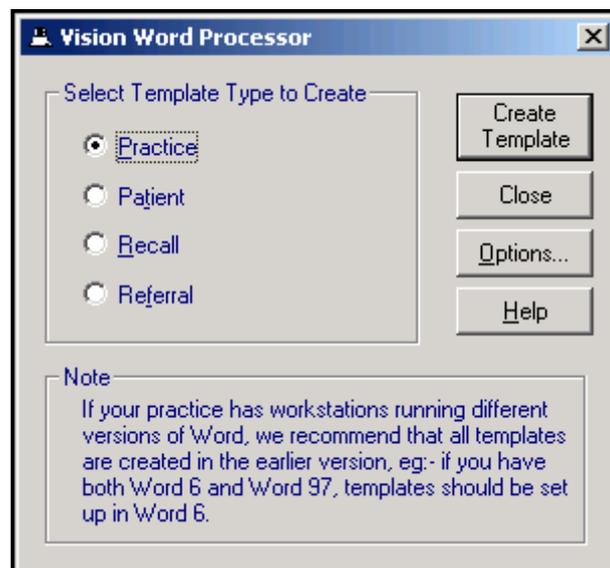
 **Note - SmartTags** do not currently work with **Vision Anywhere**.

 **Important - SmartTags** rely on the colour of the text in your letter to work, **SmartTags** display in **red** so you must avoid using red in your letter for plain text. If you want to use red in your document use **Dark Red (Maroon)**, this still stands out in the document and does not disrupt **SmartTags**.

1. From the **Vision 3 front screen**, select **Utilities - Word Processor**



2. The **Vision Word Processor** screen displays:



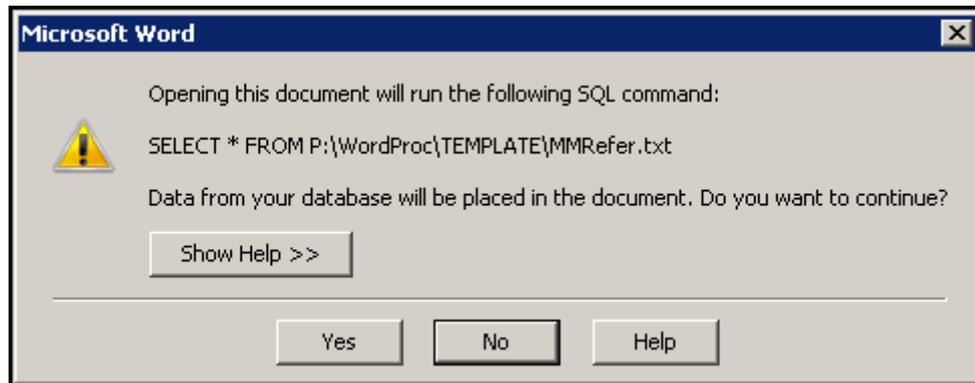
3. Select **Referral**.

 **Training Tip** - We recommend you select **Referral** as it has the most **Vision 3** merge options available.

4. Select **Create Template**.
5. A new document displays ready for you to create your template.

 **Note** - Up to this point **SmartTags** templates and standard **Vision 3/Vision Anywhere** templates are created the same way.

6. Select **File - Open**.
7. Navigate to the **SmartTags** document you are using as the basis for your template. This can be the **Blank(SmartTags3x4).doc** or any other **SmartTags** document you have access to. Select **Open** and the **SmartTags Word** document displays.
8. A **Microsoft Word** message displays, warning that this document runs a SQL command, select **Yes** to continue:

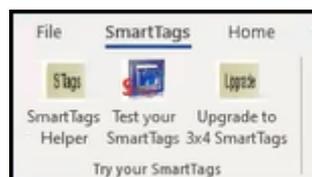


9. Create your template document in the usual way by simply typing where text is required. Where you need to merge standard **Vision 3**



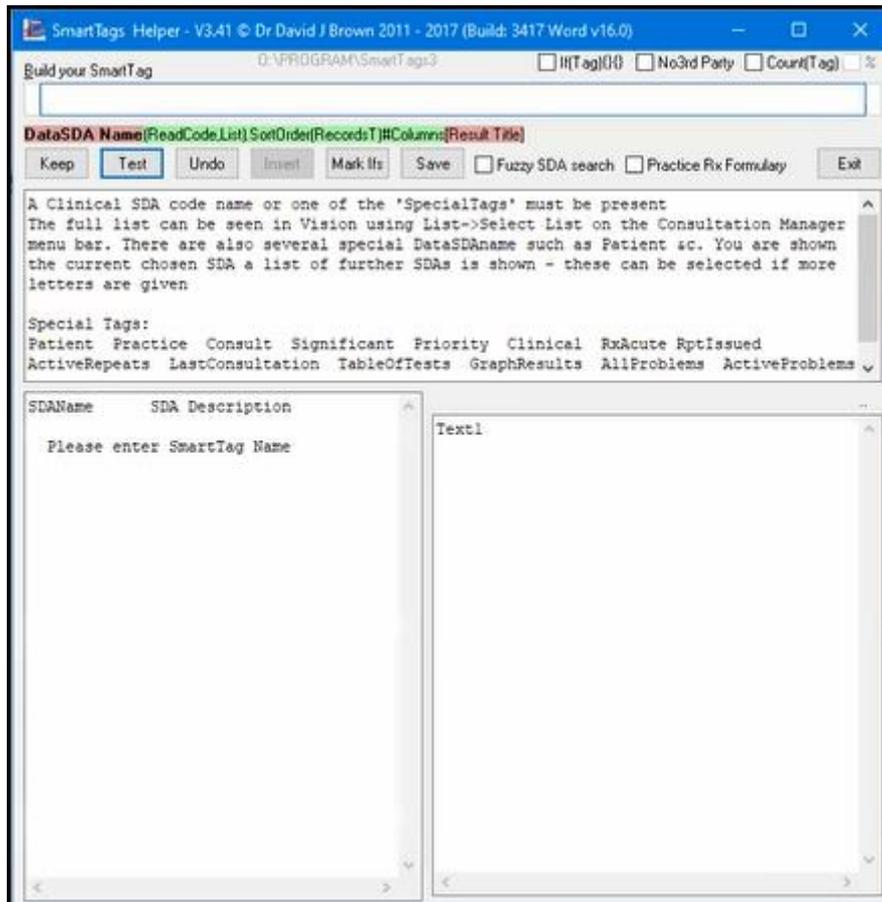
data, select **Insert Merge Field** and select the type of data required. Where there is not an existing merge field is where you need to define your own using **SmartTags**.

10. You should have a **SmartTags** option between **File** and **Home** screens:



If you do not have this option, select **View - Macros**, select **ShowTagsHelp** and then **Run**.

11. The **SmartTags Helper** screen displays. This is where you define the merges between your letter and the patient record:



12. With your cursor on the document in the appropriate position, click into **Build your SmartTags** and start defining the merge required. **SmartTags** consist of the following key elements:



Training Tip – With a patient open in **Consultation Manager**, you can select **Test** after adding an element to check you are on the right track, even if you don't test your elements, select **Keep** to save the element specified if you are happy with it.

DataSDA Name

This is where the data required is stored in **Vision 3**, start typing the name of the area required, for example, **FREETEXT** for Note Pad entries, **HAE_SCREEN** for Haematology Screening Tests or **GENERAL** for Medical History entries.

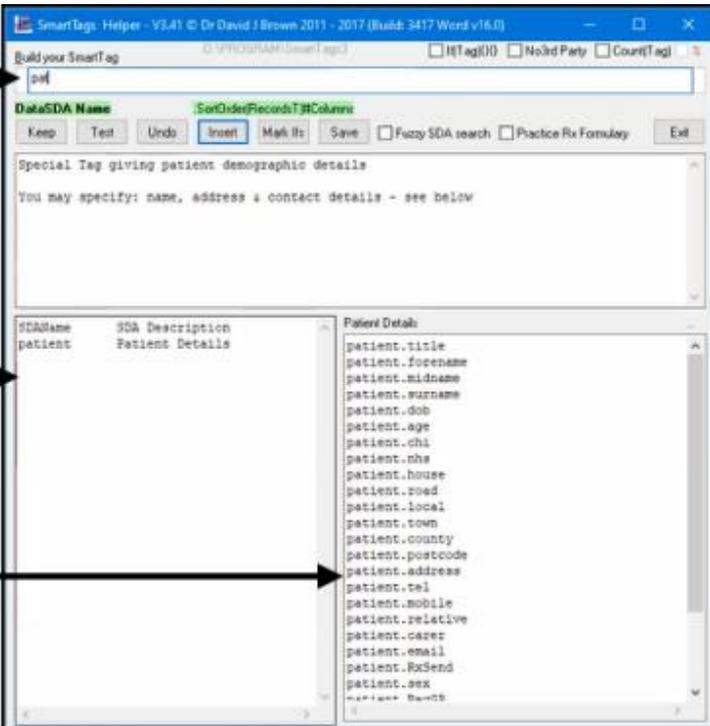


Training Tip - You can list all the areas by name from **Consultation Manager - List - Select List**, this is useful if you are struggling to find what you want.

As you type, matching data types display in the bottom left pane of the **SmartTags Helper**, select the **Structured Data Area (SDA)** required and the details available display in the bottom right hand pane:

Enter data type required.

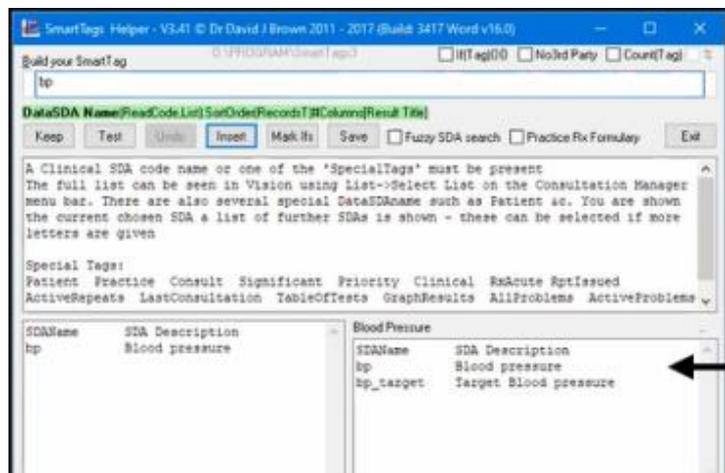
As you type above, matching SDAs display so you do not always have to type the full name. Select the SDA required to display available option to the right



SDAName	SDA Description
patient	Patient Details

Patient Details:	
patient.title	
patient.firstname	
patient.midname	
patient.surname	
patient.dob	
patient.age	
patient.chi	
patient.nhs	
patient.house	
patient.road	
patient.local	
patient.town	
patient.county	
patient.postcode	
patient.address	
patient.tel	
patient.mobile	
patient.relative	
patient.carer	
patient.email	
patient.RxSend	
patient.sex	

If more than one **SDA** matches your criteria, the options display in the bottom right pane, double click the one required to select it:



SDAName	SDA Description
bp	Blood pressure

Blood Pressure	
SDAName	SDA Description
bp	Blood pressure
bp_target	Target Blood pressure

If there is more than one match to the criteria in **Build your SmartTag**, the options display in the bottom right pane. Select the SDA required

Select the detail required and it displays in **Build your SmartTags**.



Training Tip - The following selections are optional, they simply help define the amount of detail you want in the letter.

ReadCode

A clinical code is indicated by brackets () straight after the **DataSDA Name** with no space. Enter the Read code required:

- Use the full five digits of a code to select just one code, for example, **(246..)** only picks up the one code.
- Use less than the full five digits of a code to select the hierarchy under the code, for example, **(246)** picks up code **246** and everything under it.
- You can include more than one code by separating them with a comma, for example, **(C10..,H33..)** with no spaces.
- You can exclude a code from the result by preceding it with a minus, for example, **(246,-246n.,-246m.)** which looks at all codes that start with 246 but excludes 246n. and 246m..
- Defaults to the last matching entry of this type, double click **first** from the bottom right pane to display the first matching entry of this type.

Sort Order

The order and number of records that display is indicated by a full stop . and then the criteria in brackets () with a colon between them, for example, **.(3)** would return the last three records of this type, **.(3:1y)** would return the last three records of this type in the last year. You can also enter a t at the end to display the results in a table, for example **.(3:1yt)**.

Columns

The SDA data can be specified by using a # and selecting from the list that now displays in the bottom right pane. This is different for each SDA, for example, **#ade** to display the information in those sections only, this can be in the order you require.



Training Tip - As you work through the key elements, the text highlighted in green indicates what you are defining by displaying in bold. If you enter invalid criteria, it highlights the invalid section in red, be warned this displays in red if you have not finished a definition too.

A structured **SmartTag**, may look something like this **bp.(3)#ade**:



Which would return, the **Date**, **Description** and **Value** of the last **3** blood pressure results for a patient.

13. Select **Insert** to add the **SmartTags** to your document.
14. With a patient open **Vision 3**, from **SmartTags Helper**, select **Test** to check the **SmartTags** created does return the information required. Select **Undo** to return to the last time you selected **Keep**.

 **Note** - If there is no data of the type being merged, clinical data displays as 'not found', patient details displays as a blank.

15. Finally, select **Save** to save this **SmartTag**.

Repeat the process from Step 12 - Step 15 wherever you need **SmartTags** in your document.