SmartTools

Introduction to SmartTools

SmartTools are charting shortcuts that you can use to pull various information into your documentation.

SmartTools	Use to pull in
SmartTexts	Templates or blocks of text
SmartPhrases	Templates or blocks of text that you (or your IT team) can create
SmartLinks	Information from another part of the chart
SmartLists	A predefined list of choices

> ℹ️ You can use SmartTools in many places throughout Epic, such as notes, patient instructions, and letters. If you see these buttons, the field is SmartTool-enabled:
>
> ⭐ **B** 🔍 ᵃᵇᶜ ↩ 🔖 ➕ Insert SmartText ▭ ⇦ ⇨ ⇉ ⟳ ⇲ 🔲

Use SmartTexts

SmartTexts are standard templates or blocks of text used to write notes for routine visits or problems you treat often, such as diabetes. SmartTexts can also be used to write routine patient instructions and other types of documentation.

1. Enter a few letters of the SmartText's name in the **Insert SmartText** ▭ field and press **Enter**.
2. Double-click a SmartText to insert it.
3. Press **F2** to complete any SmartLists and wildcards (***) in the SmartText.

> ℹ️ Preview the contents of a SmartText on the right-hand side of the SmartText Lookup window before adding it to your documentation.

Find your favorite SmartTexts faster

There are hundreds of available SmartTexts, but you might use only a handful. Quickly find the ones you use most often by marking them as your favorites.

1. Open a new note.
2. In the **Insert SmartText** ▭ field, enter the first few letters of the SmartText you want and press **Enter**.
3. In the SmartText Lookup window, click ☆ next to the SmartText.
4. Add other commonly used SmartTexts to your favorites by searching for them and repeating step 3.
5. Select the **Favorites Only** checkbox.

   - From now on, when you click ▭, your favorite SmartTexts appear.
   - Additionally, when you search for a SmartText in the **Insert SmartText** field, only your favorites appear initially. If the SmartText you need isn't among your favorites, clear the **Favorites Only** checkbox.

Use SmartPhrases and SmartLinks

Use a SmartPhrase

SmartPhrases allow you to type a few characters that automatically expand to a longer phrase, paragraph, or template. For example, typing ".hpipneu" and selecting the HPIPNEUMONIAGEN SmartPhrase expands to an HPI template for pneumonia.

1. In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name. For example, enter ".hpianemia". As you type, a list of matching SmartPhrases and SmartLinks appears.
2. Use the arrow keys to select the SmartPhrase you want to use and press **Spacebar** to insert it.
3. Press F2 to jump to the first SmartLists or wildcard (***) in the SmartPhrase.

   □ A wildcard (***) is a placeholder. You can type over it with your own text or delete the placeholder.
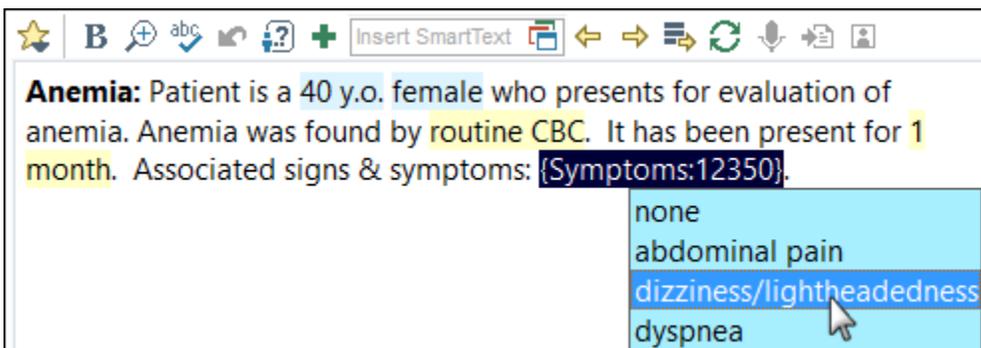
Refer to p. 4 for more information on using SmartLists.

Use a SmartLink

SmartLinks help you write notes quickly by pulling or "linking" information from the patient's chart directly into your documentation. SmartLinks often appear within SmartPhrases, but you can also use them on the fly. Enter a period (.) followed by the SmartLink's name, as you do when using a SmartPhrase.
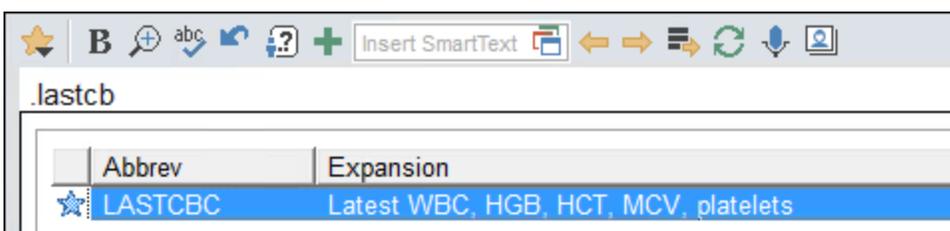
When inserting a SmartLink, press **Enter** to start a new paragraph after pulling in the SmartLink. Press **Spacebar** to continue with the same sentence or paragraph.

Browse available SmartPhrases and SmartLinks

1. Click 🔧 on the SmartTools toolbar to see any SmartPhrases you've created. If none appear, select **System SmartPhrases** to see all available phrases.

   □ The **Abbrev** column shows you what to type after the period (.) to use the phrase or link in a note.
   □ The **Expansion** column shows you the text that the phrase or link pulls in or, for longer phrases, includes a general description of the text.
   □ 🔧 indicates a SmartPhrase.

□   🔗 indicates a SmartLink.

2. To find phrases and links, you can:

   a. Use the **Filter** tab to select the SmartTools you want to see.
   b. Search for specific links or phrases.
   c. Click ☆ to mark links and phrases as favorites.
   d. Use the **Sort** tab to control which items are listed first.

3. Double-click a SmartPhrase or SmartLink to insert it.

> ⓘ   To see all available phrases and links, enter ".?" in a note.

Use SmartLists

SmartLists are lists of common choices that help you quickly customize your documentation. For example, the respiratory history SmartList contains choices like asthma and COPD. SmartLists are used in SmartTexts and SmartPhrases and look something like this: {resp history:19195}.

Select from a SmartList

1. Press **F2** to jump to the next SmartList or wildcard (***) in your note. Some values in a SmartList might be selected by default. You can change them if needed.
2. Click other values to select them.

   □ A yellow background indicates that you can select only one value.
   □ A blue background indicates that you can select one or more values.

3. If you accidentally select a value, click again to clear it.
4. Right-click in the SmartList to save your selections and move to the next SmartList or wildcard.


```
Subjective
The patient is a 40 y.o. female who presents today for a commercial
driver fitness determination physical exam. The patient reports
{problems:16946::"no problems"}.
{History Review:19316}.          problems - ***
Review of Systems               no problems
{ros - complete:30496}.         ***
```

> ⓘ   Use the mnemonic "left-click to pick, right-click to stick" to remember which mouse button to use when you're making selections.

> ⓘ   You can save time by documenting any abnormal values first and then applying any default values for the remaining SmartLists in one click. After selecting abnormal values, click ⇛ on the SmartTool toolbar to apply any available default values for the remaining SmartLists.

Undo a SmartList selection

To undo your last selection, click ↶ or press **Ctrl+Z**.

To undo any SmartList selection, right-click the SmartList and choose **Reselect This SmartList's Selections**.

Create or Edit a User SmartList

You can create and edit your own User SmartLists or share your SmartLists with other users.

Create a User SmartList

1. Use Chart Search to open the SmartList Editor and select **Create SmartList**.
2. Enter a name for the SmartList.
3. If you're able to also create and edit System SmartLists, you see a **Type** prompt. Select **User**.
4. Click **Accept** to create the SmartList and open the SmartList Editor.

Edit an Existing User SmartList

1. Use Chart Search to open the SmartList Editor and search for the SmartList. If you're searching for someone else's SmartList, select the **Include all SmartLists** check box.
2. Click **Accept** to open the User SmartList in the SmartList Editor.

## Define the User SmartList Options

1. In the **Choice** table, enter the choices in the SmartList (A). Select the check box next to an option to mark it as the default option.
2. To add another SmartTool (SmartText, SmartList, or SmartLink) to a choice in the SmartList, click the ⭐ and select one of the options (B):

   - ▫ 🗐 **Insert SmartText**
   - ▫ ☰ **Insert SmartList**
   - ▫ ❓ **Insert SmartLink**

> ℹ️ These fields are SmartTool-enabled, meaning you can use dotphrases to enter SmartLists, or use keyboard shortcuts to open the lookup windows.

3. If you want to be able to select more than one option in the SmartList, select the **Multiple Select** option (C).
4. In the **Connection Logic** section, specify how the selections appear in the SmartLink's generated text. For example, And logic would produce "Red, White, Blue, and Green" if all options in this SmartList were selected. Hover over each option for a description.
5. If the SmartList includes choices that shouldn't be selected together (for example, "Red and White" can be selected together but "Red and Blue" can't):

   a. Select the **Mutually exclusive groups** button.
   b. In the **Group** column (D), enter the group to which the selection belongs. If a selection has a group specified, it can only be selected by itself, with another option from the same group, or with an option that has a blank group name.

6. If you want to show a label in the generated text (for example, "Color: Red and White"), enter Yes in the **Label?** field (E) and enter the display text in the **Label text** field.
7. The **Reselectable** button (F) is selected by default, which allows you to re-select your options when using the SmartList. Unselect this checkbox if you do not want to be able to re-select options.
8. To make the SmartList optional, meaning that you don't have to complete it before saving the text that contains it, select the **Optional?** check box (G).

9. When you're done editing your SmartList, click ✔**Accept** to save your SmartList and exit the SmartList editor.
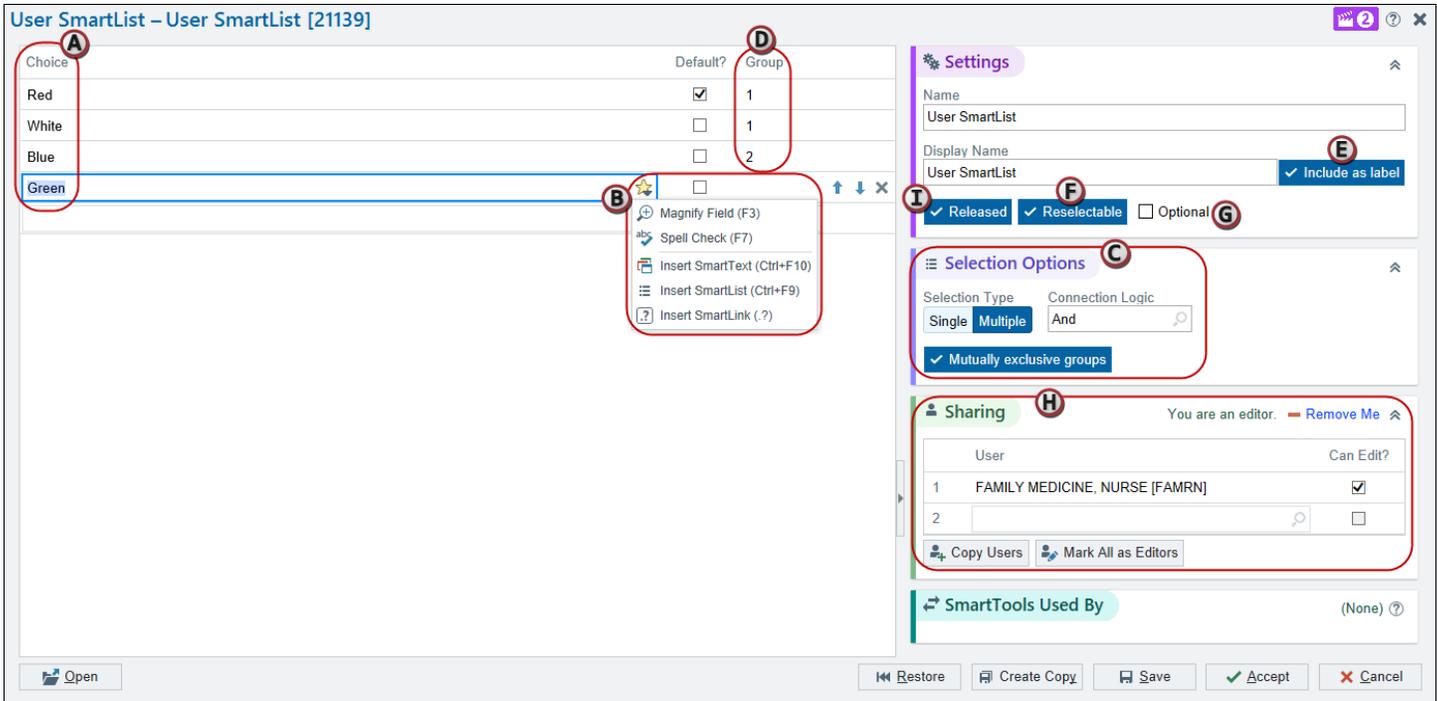
Let Other Users Use Your SmartList

1. In the **Sharing** section (H), list the users who can use the SmartList in the **User** column.
2. Select the **Can Edit?** check box to allow a user to modify your SmartList.

Copy Users from a SmartPhrase or SmartList

If a SmartPhrase or SmartList has a list of users that you want to copy:

1. Click 👥 **Copy Users**.
2. Toggle the **Search on** option to search for a SmartList or a SmartPhrase.
3. Select a SmartPhrase or SmartList. Its users appear in the **Users to Copy** section. Users who can edit the selected SmartPhrase or SmartList have a ✔ check mark icon next to their name.

Pull lab results into your note with SmartLinks

By setting different parameters, you can specify which result components to include, as well as whether to pull in a certain number of results or to include all the results within a given period of time.

Look up component base names

To pull in results for a specific component, you need to know the component's abbreviation, or base name. You can find components' base names in lab reports in Chart Review.

1. In Chart Review, select the **Labs** tab and select a result that includes the component you're interested in.
2. In the lab report, scroll to the **Lab Component SmartPhrase Guide** and click the link for this test.
3. Note the entry in the Base Name column of the table. This is the base name that you can use with any of the following SmartLinks to pull results for this component into your note:

   ▫ RESUFAST

- □ LABRSLT
- □ LABRCNTIP

The RESUFAST and LABRSLT SmartLinks are typically used for outpatient contexts, while the LABRCNTIP SmartLink is typically used for inpatient contexts.

Pull in recent results for specific components with a SmartLink

To keep your note brief, use one of the following SmartLinks to pull in the results of a recent lab of your choice in a table listing the date, result value, reference range, and status of the result, as well as any comments entered with the result:

- RESUFAST
- LABRSLT
- LABRCNTIP

The RESUFAST and LABRSLT SmartLinks are typically used for outpatient contexts, while the LABRCNTIP SmartLink is typically used for inpatient contexts.

Let's say you wanted to use the RESUFAST SmartLink. In your note, place your cursor where you want to insert the results, enter ".resufast[BASENAME:#", and press **Enter**.

- In place of "BASENAME", enter the base name of the component for which you want to insert results.
- In place of "#", enter the number of results you want to insert. For example, enter ".resufast[pocglu:3" to insert the patient's last three POC glucose results.

  - □ To insert all of a patient's results for the component, enter "*" instead of a number.
  - □ To insert only the most recent result, omit ":#" and just enter ".resufast[BASENAME".

- To insert results for multiple components, separate them with commas. For example, enter ".resufast[pocglu:3,poccreat" to insert the patient's last 3 POC glucose results and her most recent POC creatinine result.

These bullet points apply to all three of the SmartLinks mentioned above.

> ⓘ For additional instructions on using any of the aforementioned SmartLinks or other lab-related SmartLinks that require you to set parameters, enter a period (.) followed by the name of the SmartLink and press **Enter**. For example, enter ".labrcnt" and press **Enter**. Instead of pulling in lab results, the SmartLink pulls in help text. When you've read the text and successfully inserted the lab results you want, just delete the help text.

Pull in all of a patient's recent lab results with the GETLABS SmartLink

If you need to insert all of a patient's recent lab results, use the GETLABS SmartLink. You can specify the time period in which to search for results and the display format.

> ❗ If a patient has many recent lab results, using the GETLABS SmartLink can cause your note to become quite long, making it more difficult to read. We recommend using the any of the following SmartLinks instead to pull in results for specific components:
> - RESUFAST
> - LABRSLT
> - LABRCNTIP

In your note, place your cursor where you want to insert your patient's results. To pull in all of a patient's lab results from the past 6 months, enter ".getlabs[6M,1".

- Entering "6M" pulls in results within six months of the current visit or admission. Replace "M" with "D", "W", or "Y" to specify days, weeks, or years, respectively.
- The second parameter controls what information appears. Enter "1 "to pull in the component name, value, reference range, and status of each result. Enter "2" to pull in only the component name and value of each result.

Create a SmartPhrase to reuse text you commonly type

Create a SmartPhrase from text you type

1. While charting, type the text you want to save as a SmartPhrase. Make sure the text doesn't include any patient-specific information, so you can reuse it for other patients.

   □ You can create a SmartPhrase anywhere you see this toolbar:

2. Select the text and click ✚.
3. In the SmartPhrase Editor, enter a short, intuitive name for your SmartPhrase in the **Name** field. This is the name you'll type to insert the SmartPhrase in a note.

   □ You can't include spaces or symbols in the name.

> ⓘ Preface the name with your initials so you can find it easily.

4. Enter a summary of your SmartPhrase in the **Description** field.

   □ When you search for your SmartPhrase, this description appears in the results after the SmartPhrase name. If you leave the description blank, the beginning of the SmartPhrase text appears.

5. Click **Accept** to save and close your new SmartPhrase.
6. To use your SmartPhrase in a note or letter, type a period immediately followed by the SmartPhrase name. Press the **Spacebar** to insert your SmartPhrase in the note.

Create a SmartPhrase from a SmartText

If you frequently make the same changes to a certain SmartText, save your edited version of the text as a SmartPhrase.

1. In a note, click ✚ to open the SmartPhrase Editor.
2. In the **Insert SmartText** 🔲 field, search for the SmartText you want to edit.
3. Edit the text to reflect your preferences.
4. Name your new SmartPhrase and click **Accept**.

Customize your SmartPhrases

To edit a SmartPhrase you created, open **My SmartPhrases** from Chart Search. Double-click the SmartPhrase you want to edit.

> ⓘ To delete any duplicate or unused personal SmartPhrases, select it and click ━ **Remove**.

Add a SmartLink to your SmartPhrase to pull in patient-specific information

1. In the location where you want the SmartLink to appear, enter a period followed by the first few letters of the SmartLink's name. A list of matching SmartLinks appears.
2. Double-click a SmartLink to insert it. The SmartLink appears in your SmartPhrase between @ symbols, such as @NAME@.
3. Click **Accept**. The next time you use this SmartPhrase, patient-specific information appears where you added the SmartLink.
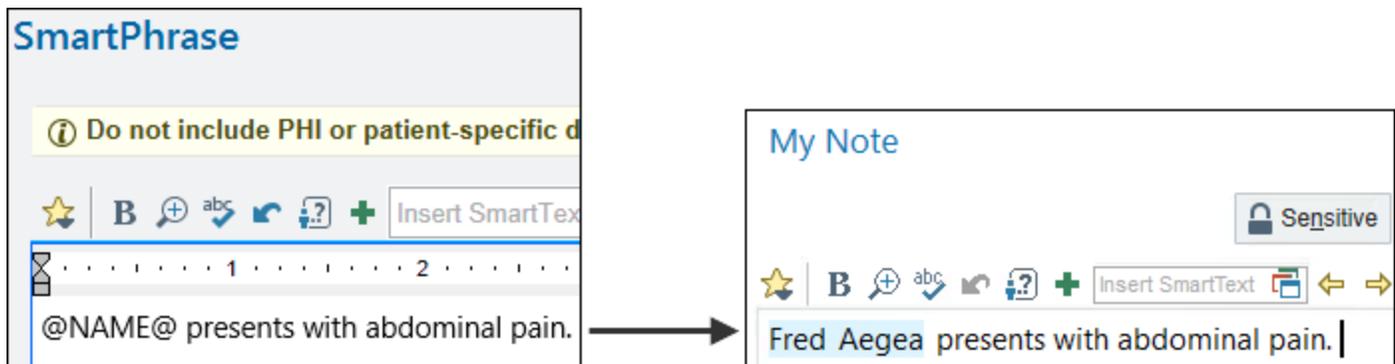
Add synonyms to quickly find your SmartPhrases

When writing a note, you can pull in your SmartPhrase with its name or a synonym.

1. Open one of your SmartPhrases.
2. In the **Synonym** field on the right, enter any other names you might use to search for this SmartPhrase. For example, you might name a SmartPhrase ABDOMINALPAIN and include a synonym of STOMACHPAIN.
3. Click **Accept**.

Add a SmartList to your SmartPhrase

Use SmartLists to select from a list of common choices when writing your note.

1. Open one of your SmartPhrases. In the **Insert SmartList** field, enter the first few letters of the SmartList and press **Enter**.
2. Select the SmartList you want.
3. Click **Accept**. The next time you use this SmartPhrase, you must make selections from all included SmartLists before you can sign the note.

DESC; ABDOMINAL PAIN ↗

☐ Include as label   Desc; abdominal pain

Connection Logic | And | None | Nor | Or | Paragraph | Sentence |

Default?	Choice
	{MILD, MOD, SEV:15682}, {CHEST PAIN DESCRIPTION:5016} {ANATOMY; LOCATION ABDOMEN:112...
	radiating to the {radiation:30574}
	associated with {ABDOMEN PAIN ASSOCIATED SYMPTOMS:621}
☐	***

◄◄ Restore

✔ Accept   ✗ Cancel

Share SmartPhrases

1. In the **Sharing** section, list the users who can use the SmartPhrase in the **User** column.
2. Select the **Can Edit?** check box to allow a user to modify your SmartPhrase.

Copy Users from a SmartPhrase or SmartList

If a SmartPhrase or SmartList has a list of users that you want to copy:

1. Click 👤➕ **Copy Users**.
2. Toggle the **Search on** option to search for a SmartList or a SmartPhrase.
3. Select a SmartPhrase or SmartList. Its users appear in the **Users to Copy** section. Users who can edit the selected SmartPhrase or SmartList have a ✔ check mark icon next to their name.