!Physician User Settings Guide

Adult Patient	Location IP/OP	Pediatric Patient	Location IP/OP	Newborn Patient	Location IP/OP
Zoro	ED	Zelda	ED	Luke	IP
Wynonna	ED	Wayne	ED	Charlie	ED
Xavier	IP	Xenia	IP		
Yolanda	IP	Yosef	IP		
Link	OP	Bowser	OP		
Mario	OP	Samus	OP		
Peach	OP	Rosalinda	OP		
Daisy	OP	Toad	OP		

Introduction

Use this guide as a companion during User Settings Labs and as you continue updating your user settings after go-live. During User Settings Labs, you should also receive a handout that lists specific tools for your specialty that you can use as a starting point.

User Settings Priorities

During User Settings Labs, start with the Pre-Live sections. There is one section that applies to all specialties, and additional sections that may apply to you, depending on whether you work in an outpatient setting, inpatient setting, or both. There are also additional sections for specialty-specific modules: Focus first on:

- Any settings for your specialty-specific module (if you have one)

All Specialties:

- Create your own note templates with SmartPhrases
- Create a NoteWriter macro to record common findings
- Update your preference list for efficient ordering

Outpatient specialties:

- Create QuickActions
- Create your own version of a SmartSet

Inpatient specialties:

- Create your own version of an Order Set
- Create new patient lists

If you have time, complete remaining topics in the Pre-Live section.

User Settings Videos

Within this guide, many of the topics include a link to a video. Each video is a short introduction to a user setting, showing the benefit of updating that user setting and an example or two of how it can be used. It's helpful to view each video before following the steps in this guide to update the corresponding user setting.

If you are not viewing this guide electronically, follow these steps to get to Epic Earth to view a video.

1. Log in to your Production (PRD) environment.
2. Click in the upper right of Hyperspace.
3. If it is your first time accessing this, follow the prompts to sign up for Epic Earth.
4. In the **Browse** field, search for the video you'd like to watch.

Pre-Live User Settings: All Physicians

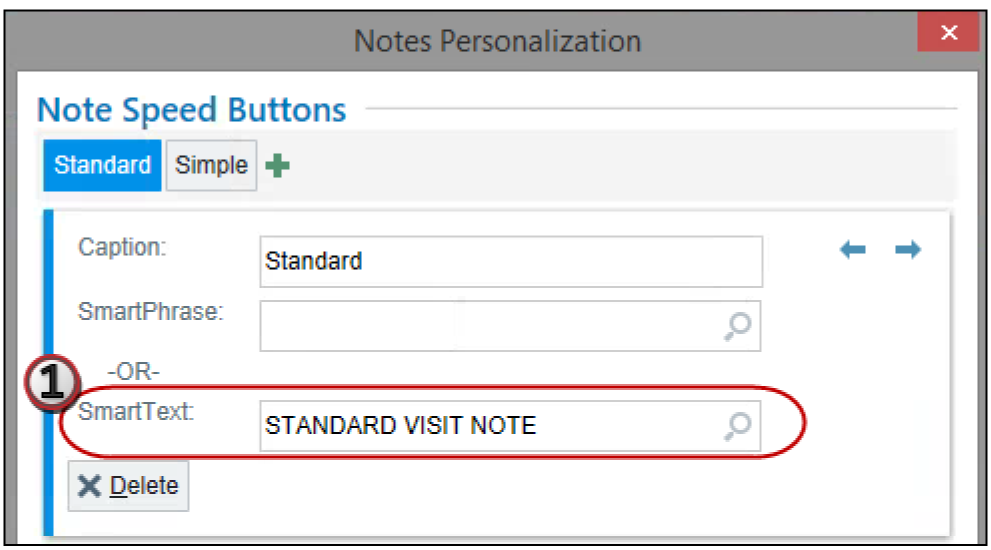
Create your own note templates with SmartPhrases

You can create your own version of any of the note templates for your specialty to better fit your needs. For example, you might want to:

- Include the patient's medication list in the note.
  - You can do so by adding the SmartLink .currentmeds.
- Place other info in the note.
  - You can do so by placing the cursor where you want the additional information and begin typing.
- Separate the Assessment and Plan sections in your note.
  - You can do so by adding these SmartLinks to the appropriate places in your SmartPhrase:
    - .assessmentbegin
    - .assessmentend
    - .planbegin
    - .planend
- Automatically pull in diagnoses and orders from the visit to populate your Assessment and Plan.
  - You can do so by adding the SmartLink .assessplan

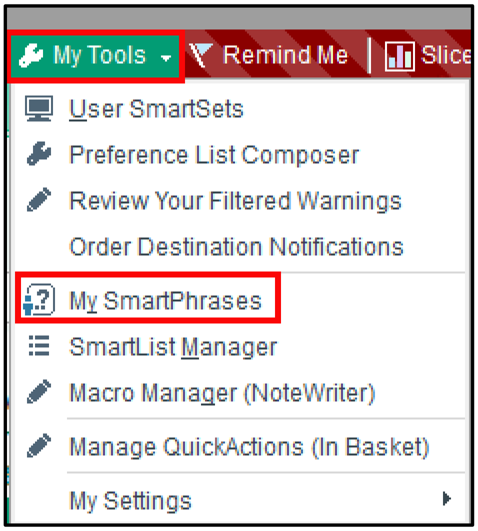
After you make changes to a note template, save it as a SmartPhrase, so you can quickly pull your template into future notes.

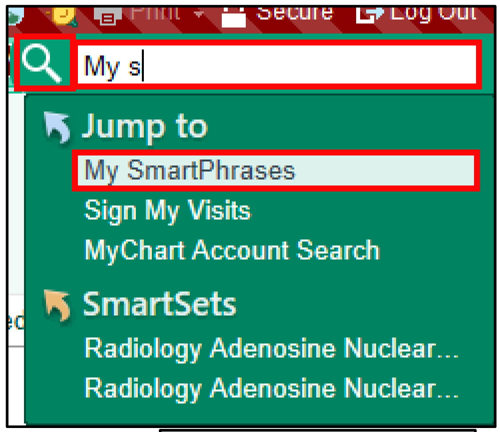
1. Find the name of the note template you want to update for yourself. For example, on the outpatient side, click the arrow next to **Create Note**, and write down the name of the template you want to change. Or, click at the top of the Notes sidebar and write down the name of the SmartText you want to change.



2. Click **My Tools** on the main toolbar, and then select **My SmartPhrases**.

    - Or use Chart Search to open **My SmartPhrases**.

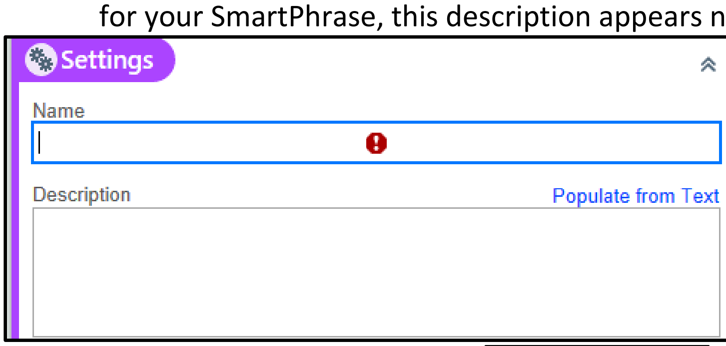




3. Create a new SmartPhrase by clicking the button in the toolbar and give it a short, intuitive name.

    - You might want to begin your phrases with your initials. For example, if your initials were "N.J.", you might name the SmartPhrase "NJPROGNOTE."

4. In the **Description** field, be sure to enter a short description that tells you what this phrase is or what you want to use it for, like standard visit progress note, or MC Wellness prog note. When you search for your SmartPhrase, this description appears next to the name.

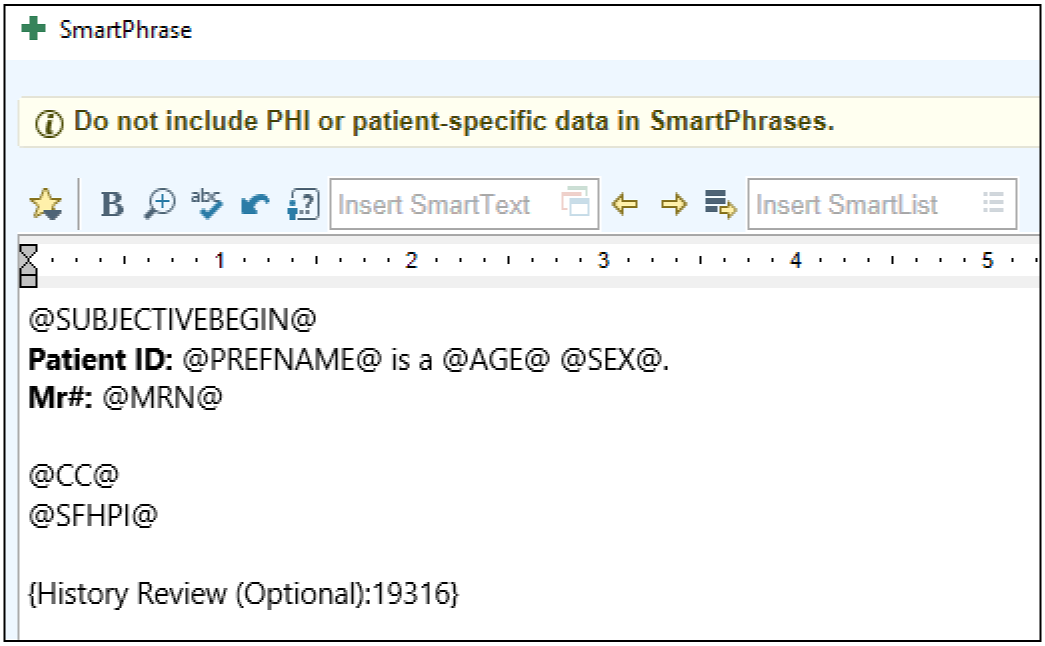


5. In the **Insert SmartText** field, enter the name of the note template you recorded in **Step 1**.
6. Adjust the details of the note template as needed.

    - You can pull SmartLinks into your note template by typing a period followed by the name of the SmartLink, with no spaces. The SmartLink appears in your template surrounded by @ symbols.

7. Click **Accept** when you're done.

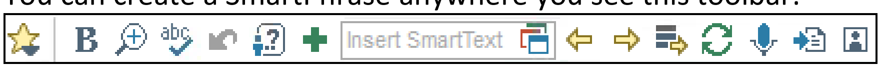
8. To use your new SmartPhrase, either click on the **butler** icon in the toolbar, select your phrase and click the **Add and Close** button, or in the note, type a period followed by the SmartPhrase name, and then press the **Spacebar** key.



Create a SmartPhrase from text you type

Watch POSS067: Niftier Notes #1 to see the benefits of updating this user setting.

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 or look for in the butler icon.
   - You can't include spaces or symbols in the name.

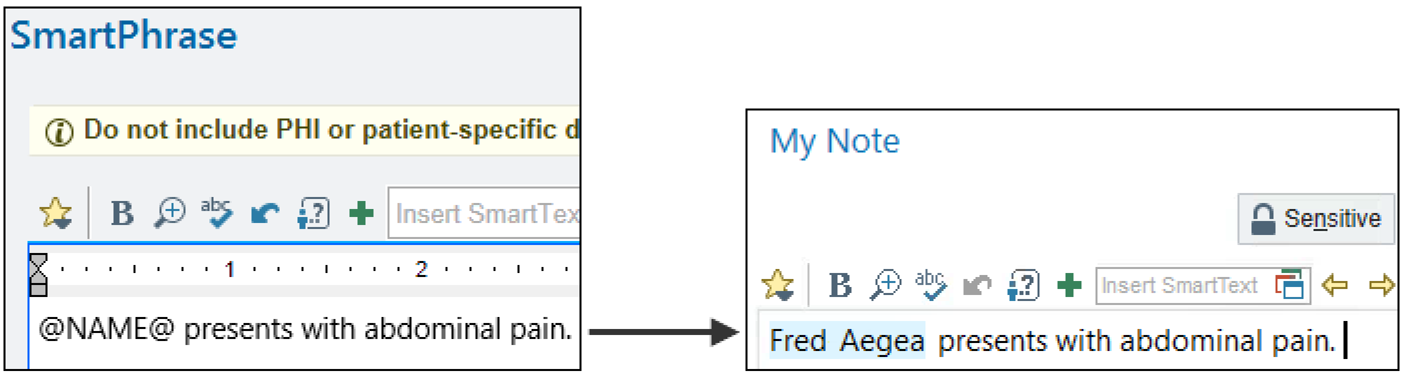
Preface the name with your initials so you can find it easily.

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, either click on the **butler** icon in the toolbar, select your phrase and click the **Add and Close** button, or type a period immediately followed by the SmartPhrase name. Press the **Spacebar** to insert your SmartPhrase in the note.

Add synonyms in the **Synonym** field to make your SmartPhrase easier to find. To see how, refer to [Add synonyms to quickly find your SmartPhrases](#).

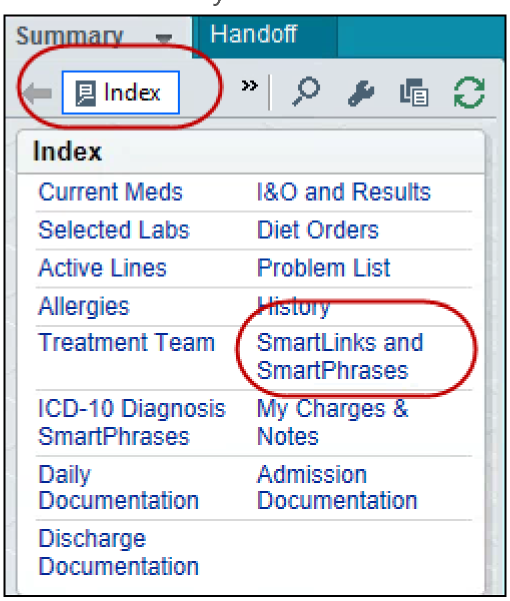
Add a SmartLink to your SmartPhrase to pull in patient-specific information

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.



For a list of SmartLinks that are commonly used in outpatient notes, refer to the Useful SmartLinks guide on your Learning Home.

On the inpatient side, you can find a list of commonly used SmartLinks and SmartPhrases in the Summary sidebar under the **Index** report.



Add synonyms to quickly find your SmartPhrases

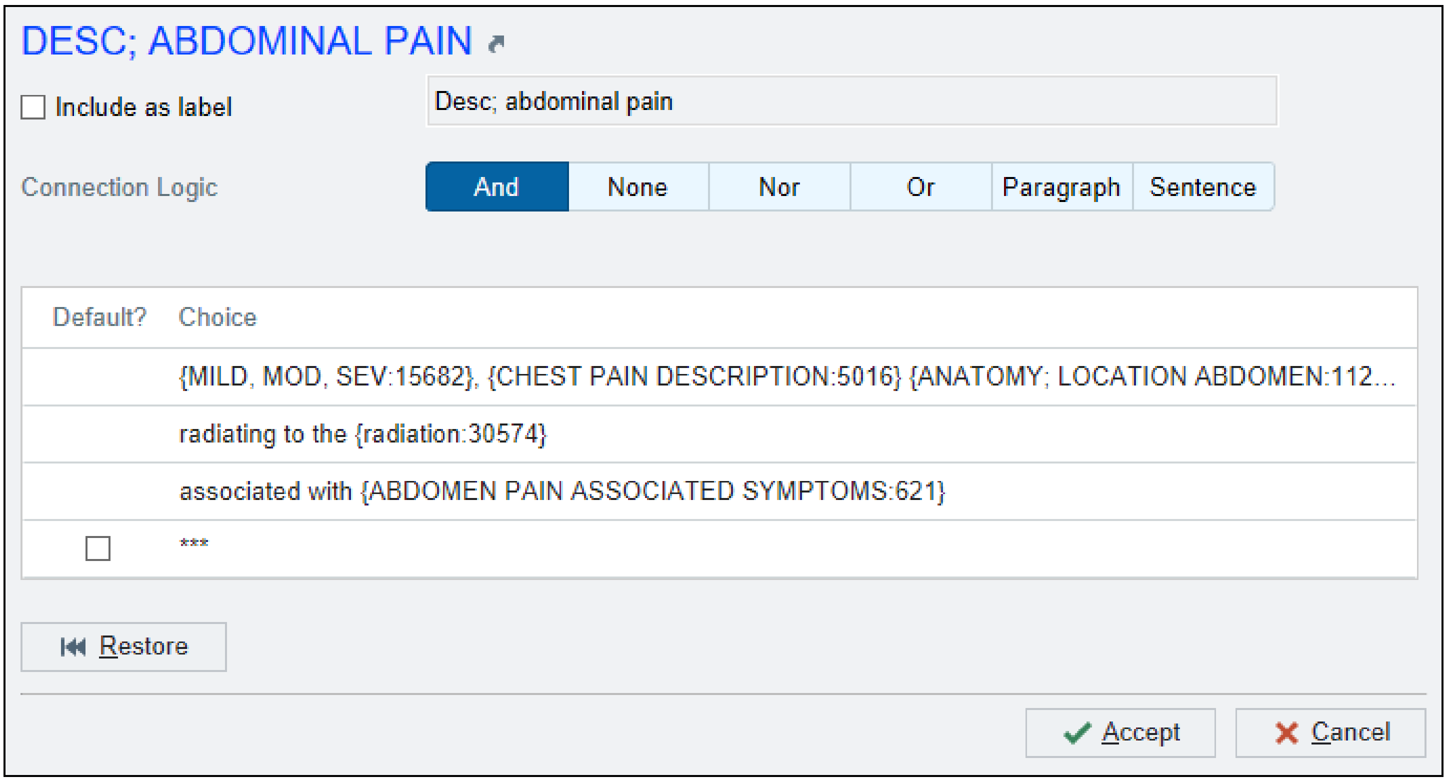
When writing a note, you can pull in your SmartPhrase with its name or a synonym.

1. Open one of your SmartPhrases in the **My SmartPhrases** activity.
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.



See a list of available SmartLists by clicking **My Tools** and selecting **SmartList Manager**.

Share SmartPhrases

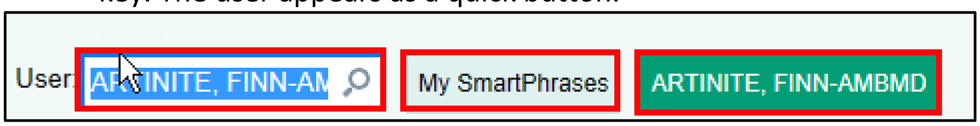
In the SmartPhrase Editor, use the **Sharing** section to enter the names of any colleagues who should have access to your phrase. Keep in mind two things about sharing SmartPhrases: if the person who created the SmartPhrase leaves the organization, the SmartPhrase will disappear, and, if you grant someone the ability to edit the SmartPhrase, any edits they make will impact the SmartPhrase for everyone using it. It is sometimes better to have them make their own copies of the SmartPhrase. Then they are able to edit their copy and it doesn't impact your SmartPhrase at all. In addition, that copy is owned by them, and is no longer dependent on the user staying at the organization. Instructions for making your own copy of someone else's SmartPhrase are in the following section.

- To grant another user the ability to edit your SmartPhrase, select the Can Edit? check box.
- Individuals can also add their own names as Users in someone else's SmartPhrase, but cannot give themselves editing privileges.

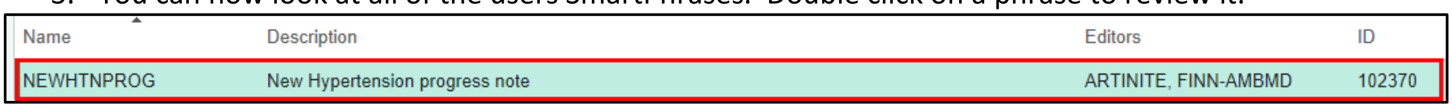
> You can copy the User list from one phrase to another. In the new phrase, within the **Sharing** section, click **Copy Users**. Select an existing SmartPhrase in which you've already listed users and click **Accept** to add those users to the new phrase.

Make your own copy of someone's SmartPhrase

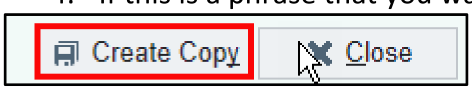
1. Click **My Tools** on the main toolbar, and then select **My SmartPhrases**.
2. In the **User** field, enter the name of the user who has the phrase you want to copy and hit the Enter key. The user appears as a quick button.



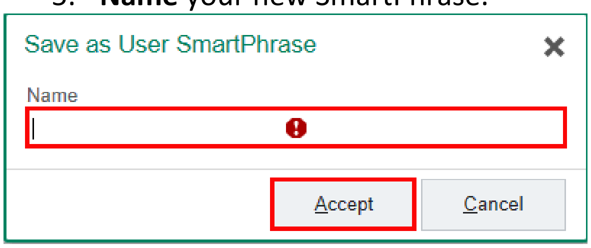
3. You can now look at all of the users SmartPhrases. Double click on a phrase to review it.



4. If this is a phrase that you want to copy, click the **Create Copy** button at the bottom right corner.

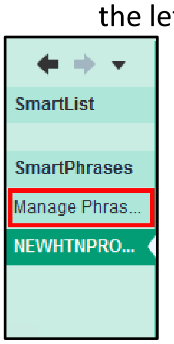


5. **Name** your new SmartPhrase.



6. Now you can make edits in the **SmartPhrase Editor** window, as well as add synonyms. Once happy with the SmartPhrase, click the **Accept** button at the bottom right corner.

7. To see your list of SmartPhrases, including the one you just copied, click the **Manage Phrases** tab on the left side of your screen.



8. This takes you back to the **My SmartPhrases** workspace. Click the **My SmartPhrases** quickbutton My SmartPhrases in the toolbar and your SmartPhrase list appears.

Name	Description	Editors	ID
DRLOFFICENOTE	DRL Office Note	FAMILY MEDICINE, PHYSICI...	102730
HYPERLIPIDEMIA	Patient Instructions for patients with Hyperlipidemia	FAMILY MEDICINE, PHYSICI...	102320
NEWHTNNOTE	New Hypertension progress note	FAMILY MEDICINE, PHYSICI...	102371

Save your favorite SmartText templates

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. In a note, search for a SmartText in the **Insert SmartText** field Insert SmartText.
2. In the **SmartText Lookup** window, click ☆ next to the SmartTexts you want to mark as your favorites.
3. Add other commonly used SmartTexts to your favorites by searching for them in the field at the top and repeating step 2.
4. To quickly access your favorites in the future, select the **Favorites Only** check box at the bottom left corner of the **SmartText Lookup** window. ☑ Favorites Only

ⓘ	Remove a SmartText from your favorites by clicking ★

Set up quick formatting options for notes

You can set up formatting options for your notes, such as underlining text or making it larger, so that these options are always available on a speed bar for all notes, letters, or patient instructions you write in the future.

1. To modify the buttons on your SmartTools toolbar, click ★ and select **Modify Toolbar**.
2. In the **Modify Toolbar** window, add or remove buttons based on your preferences, and then click ✔ **Accept**.

   - Some popular examples include **Font Size** for readers with poor eyesight, **Italic**, and **Underline**.

ⓘ	Click ⏮ **Restore Defaults** in the Modify Toolbar window to reset your changes.

Create a NoteWriter macro to pull in negative findings

🎬	Watch [POSS020: NoteWriter Macros]() to see the benefits of updating this user setting.

A NoteWriter macro can help you document a typical exam or procedure more efficiently. A macro is a set of signs, symptoms, and pertinent negatives that you commonly record during an ROS or physical exam, or information that you commonly record in a procedure note. For example, during an ROS, you can document the patient's symptoms and then apply a macro to note all pertinent negatives. Anything you document before applying the macro is preserved, and you can also make changes after applying it.

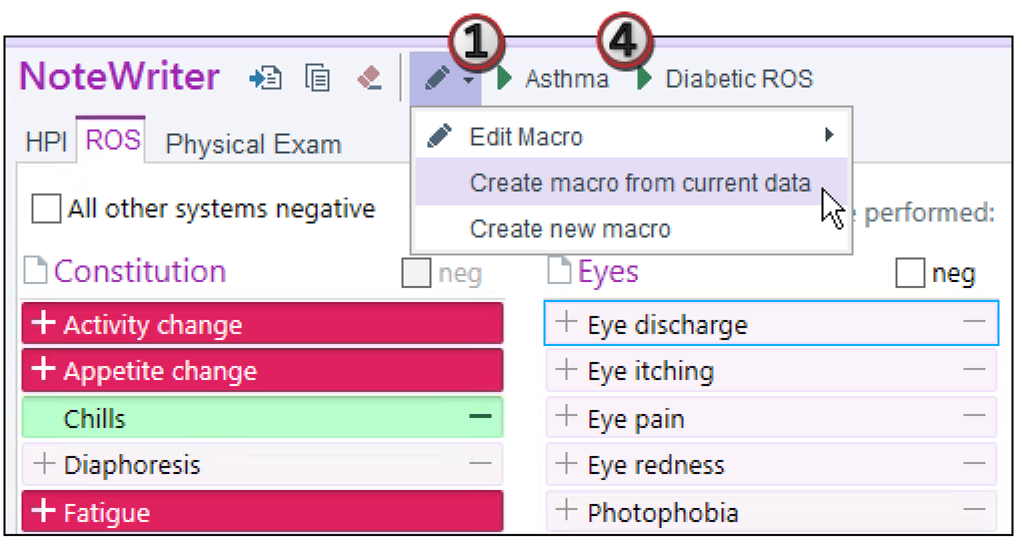
Create a macro on the fly

Follow these steps to create a macro on the fly, based on the documentation you've recorded for the current patient. Keep in mind that if you are creating a macro on a female, the macro will default to a female only macro. This means that it will not show up for males.

1. After making your selections on the **ROS**, **Physical Exam**, or **Procedures** tab of the NoteWriter, click to the right of the button and select **Create macro from current data**.
2. In the Macro Selection window, enter a name for your macro and click **Accept**.
   - Note any age and sex restrictions that appear. For example, the macro you create might apply only when you're doing a review of systems for females age 13 and older. These restrictions allow you to create different macros for female, male, and pediatric patients.
3. In the SmartBlock Macro Editor, select any other items that you commonly record. Then select the **Released** check box and click **Accept**. Your macro is now available for use.
   - Note that any additional changes you make in the editor are not automatically applied to your note for the current patient.

	To share this macro with a colleague, list her name on the **Users** list in the SmartBlock Macro Editor.

4. To apply this macro at a future visit, click the button that appears next to your new macro at the top of the NoteWriter.



Keep in mind that not all note templates will automatically include NoteWriter. You can add SmartLinks to add NoteWriter components to a SmartPhrase.

Examples include .rosbyage, .cvphysexam, etc.

Create a macro at your convenience

Follow these steps to create a macro at any time.

1. In your note text, right-click the orange-highlighted review of systems, physical exam, or procedure text, depending on the type of macro you want to create. Note the SmartBlock name in parentheses, which you'll need in step 4.
2. Use **Chart Search** to open **SmartBlock Macro**.
3. In the **Macro Selection** window, enter a **Name** for your macro.
4. In the **SmartBlock** field, enter the name you noted in **Step 1**. Enter any necessary age and sex restrictions and click **Accept**.
    - For example, you can make the macro be available only when you're doing an ROS for females age 13 and older. These restrictions allow you to create different macros for female, male, and pediatric patients.

Providers use a Normal macro most often. Make a normal macro for a perfectly healthy patient. This enables you to mark your positive findings on your individual patient, then add your normal macro to pull in the remaining negatives. Macros will never overwrite documentation that has already been added.

5. In the SmartBlock Macro Editor, select the signs and symptoms you commonly review during an exam or the prep steps you frequently perform before a procedure, for example.
6. Select the **Released** check box and click **Accept**. Your macro is now available for use.
7. To apply this macro at a future visit, open the NoteWriter tab for the type of macro you created and click the click the button that appears next to your new macro at the top of the NoteWriter.

Share a macro with colleagues

1. When creating or editing a macro, go to the Sharing section.
2. Enter the names of your colleagues in the Users list.
3. Select the **Can Edit?** check box if a user should be able to edit the macro.

Search for and browse macros

In the Macro Manager, you can search for a particular macro you have access to, browse other user's macros, and add yourself as a user without having to ask the creator to add you.

- To open the **Macro Manager**, click in the NoteWriter, or **Open a List of Macros** in the **Macro Editor**.
- Use the search bar to find macros that you own or that are shared with you.
- Double click a macro or click **Open** to open the **Macro Editor**.

- Click Browse Macros by User to search for a macro made by a different user.
- Double click a macro or click **Open** to open the Macro Editor. From here, you can add yourself to the list of users for that macro.

Update your preference list for efficient ordering

	Watch POSS023: User Preference Lists, POSS024: Preference List Organization, and POSS062: Preference List Composer to see the benefits of updating this user setting.

Organizing your preference list effectively can help you place orders more quickly. You can create sections to group orders you often place at the same time, add the orders you write most frequently with the exact details you need, and edit the display names so the orders are easier to find. After your preference list is set up, you can browse through the orders and select the ones you need for the patient.

Create preference list sections

For efficient preference list setup, first create the sections that are most useful to you, such as disease or body system sections. Then, when you place a commonly used order, save it as a favorite and add it to the correct section in your preference list.

1. Use **Chart Search** to open the **Preference List Composer**.
2. In the list that appears, double-click your Orders (Outpatient) or Orders (Inpatient) preference list.
   - It's important to choose the orders preference list because when you place an order and save it as a favorite, the order is automatically added to this list.
3. Click **New Section.**
   - Create sections that are appropriate for your specialty and that group orders you often place at the same time.
   - Enter a **Display Name** that makes sense to you.
   - Indicate whether you want orders in this section to appear alphabetically when browsing the list.
4. To add a subsection, select the section it should appear under and click **New Subsection.**
   - Add subsections that group orders appropriately for your specialty. For example, you might add subsections for meds, labs, and imaging to various disease sections.
   - Reorganize the sections and subsections in your preference list by dragging and dropping them or by using the **Section Up** and **Section Down** buttons in the bottom left.
5. Click in the upper-right corner when you're finished adding sections.

Add your top 20 orders to your preference list

To start out, save your 20 most common orders to your preference list. After go-live, add more as needed.

1. Look up an order and edit the details as usual.
2. Before signing the order, hover over it and click to add it to your preference list.
3. In the **Display name** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.

4. In the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New Section** to add another section to your list.

    - If you don't specify a section, the order will appear in the My Favorites section.

5. Enter any other details you want to use when you place this order in the future, such as instructions or answers to questions. These details appear only for you, and you can always update them later.
6. Click **Accept** and indicate whether you want to use the details you entered in step 5 for the current patient.

> Consider adding the same order to your preference list more than once with different display names and order details. For example, you might have one entry called "Cipro UTI 3 days" for Ciprofloxacin UTI with a dose of 250 mg Q12h x 3 days and another called "Cipro Sinus 5 days" for Ciprofloxacin sinusitis with a dose of 500 mg Q12h x 10 days.

Edit your preference list

After you add an order to your preference list, you might want to move it to a different section, or you might change your mind about the details you specified. In the Preference List Composer, you can edit order details and remove orders that you no longer use.

1. Use **Chart Search** to open the **Preference List Composer**.
2. In the list that appears, double-click your **Orders (Outpatient)** or **Orders (Inpatient)** preference list.
3. Select the section or subsection that contains the order you want to edit.

    a. To move an order to a different section, click the order and drag and drop it into another section.
    b. To modify order details, such as frequency or display name, double-click the order's name.
    c. To change the name of a section or subsection, click **Properties**.

4. When you're finished making changes, click in the upper-right corner.

Copy preference lists from other clinicians

> Watch POSS053: Preference List Sharing to see the benefits of updating this user setting.

To save time creating a preference list, you can copy the lists that your colleagues have created for certain types of orders. Sharing and copying preference lists between clinicians also helps spread experience and expertise throughout your organization.

1. Use Chart Search to open the **Preference List Composer**.
2. At the bottom of the screen, click **Copy User Lists**.
3. In the **From user** field, enter the name of the user whose preference list you want to copy.
4. Verify that your name appears in the **To user** field.
5. Select a copy option.

    - If you want to add the other user's entire list to your existing list, select **Merge.** This might result in duplicate orders.
    - To completely replace your list with the other user's list, select **Replace**.

6. Select the check boxes for the types of lists you want to copy.
    - The columns under your name and your colleague's name show how many orders are on each of your preference lists.
    - To see the orders on your colleague's list, double-click the number of items on his list.
7. Click **Copy.** Edits you make in the new list do not affect your colleague's list.

Browse your preference list and select orders

To browse your updated preference list, click **New** in the **Orders** activity or in the **Visit Taskbar**. Then select the orders you need from the list.

- To see only your personal preference list entries, select the **Only Favorites** check box at the top left of the **Browse** tab.
- To change the order details you saved, such as the display name or dose, right-click the order in the Preference List Browser.
- To change the appearance of your preference lists, click at the top right of the **Browse** tab. You can choose:
    - The number of columns in which orders appear.
    - Whether the sections that you created appear in alphabetical order or in the order you created them.

Create order panels

Save time searching for orders that you commonly place together, such as a set of labs. Instead of searching one-by-one for these orders, create an order panel.

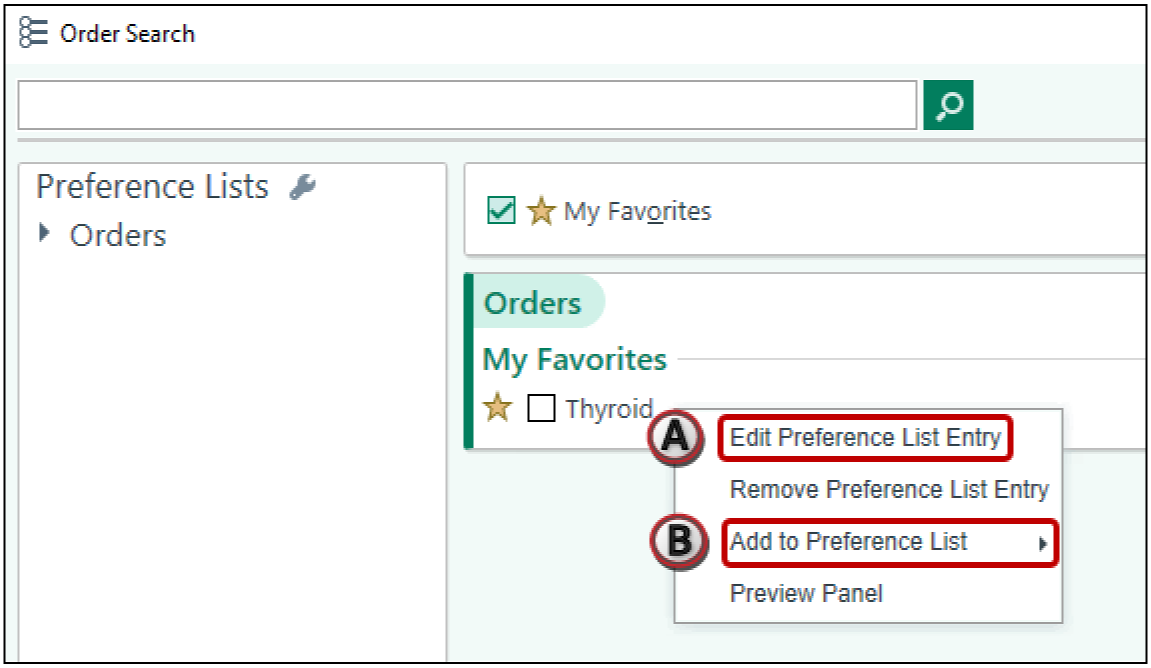
1. Within a patient's chart, search for the orders that you would like in the order panel.
2. After the orders are queued up for signing, click **Options** and select **Create Panel**.
3. In the **Display name** field, enter an easy-to-remember name for the panel.
    - Optionally, in the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New** to add another section to your list.
4. If needed, edit the details of each order.
5. Click **Accept**.
6. To use your order panel in a patient's chart, search for the order panel on your preference list by completion matching or browsing, just as you would for an individual order.

Edit or make a copy of an order panel

After you've created an order panel, you can update order details or remove orders from it. You can also create a copy of the order panel and make updates to it.

1. Click in the Visit Taskbar, and select the **Only Favorites** check box.
2. Right-click the order panel.
    a. To edit the current order panel, select **Edit Preference List Entry**.

b. To create a copy of the order panel, select **Add to Preference List** and choose a list to put the copy on.



3. Add an order, edit order details or remove orders.

Save your most frequent charges as favorites

Add your most common charges to a preference list for quick access.

1. Search for a new charge in **Charge Capture**.
2. Under the **Charges to be Accepted** header, click next to the charge you just selected.
3. Enter a short, intuitive name for the charge.

- To find your preference list entries in the future, click **Add** and select **Only Favorites**.

Sharing User Settings with Your Colleagues

Many user settings that you can update in Epic can also be shared with your colleagues. This allows you to learn from your colleagues' expertise with the system and use the same tools that they do to help increase efficiency and vice versa.

See the table below for a list of topics in this guide that can be shared. Click a link to jump to that topic to quickly learn how to share your user settings with your colleagues.

List of shareable items

User Setting	Link to topic	Push or pull?
Preference Lists	Copy preference lists from other clinicians	Both
SmartPhrases	Share SmartPhrases	Both
NoteWriter Macros	Share a macro with colleagues	Push
Patient Lists	Share patient lists	Push
Order Sets	Add another clinician's Order Set as a favorite	Pull
SmartSets	Use or Copy a Colleague's User SmartSet	Pull