Introduction to SmartTools

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

SmartTools	Use to pull in
SmartTexts	Templates or blocks of text
SmartPhrases	Long words, phrases, or paragraphs
SmartLinks	Information from another part of the chart
SmartLists	A predefined list of choices

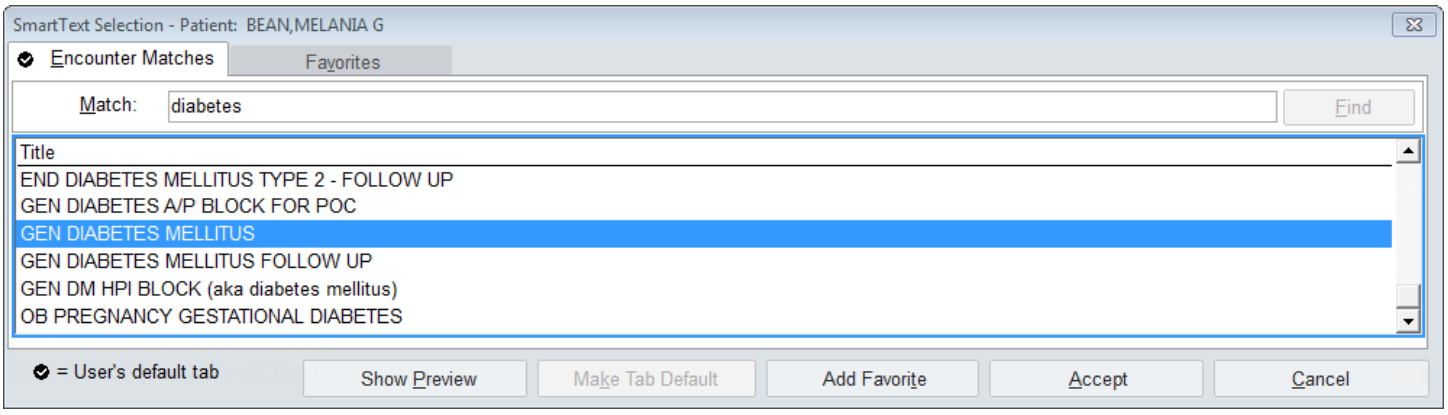
You can use SmartTools in many places throughout Epic, such as notes, patient instructions, and letters.

If you see these buttons, the field is SmartTool-enabled:

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.

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

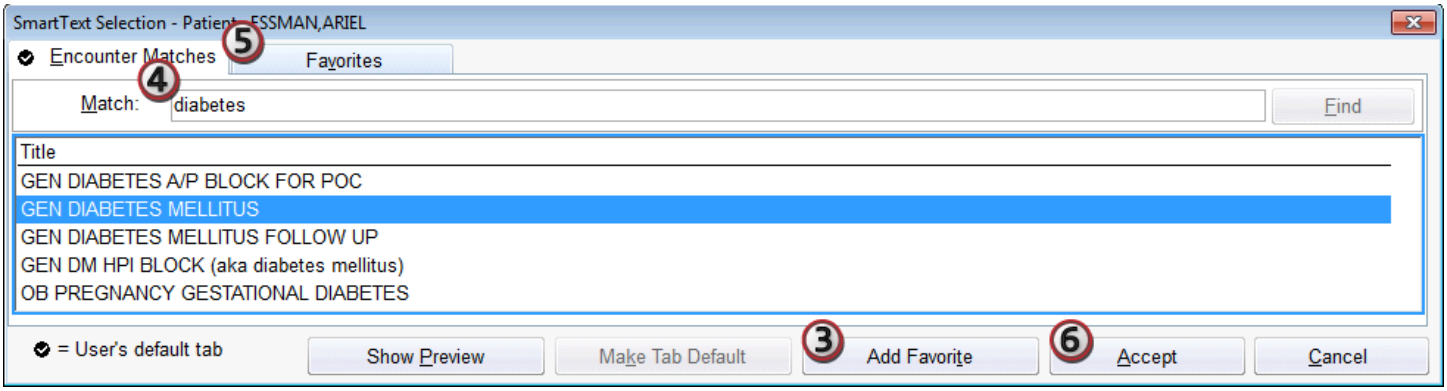


Click **Show Preview** to view the contents of a SmartText before adding it to your documentation.

Find your favorite SmartTexts faster

There are hundreds of available SmartTexts, but you probably use only a handful. Find the ones you use most often with just a few clicks 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**. The SmartText selection window appears.
3. Select the correct SmartText and click **Add Favorite**.
4. Add other commonly used SmartTexts to your favorites by searching for them in the **Match** field and repeating step 3.
5. Select the Favorites tab and click **Make Tab Default**.
    - From now on, when you click in a new note, your favorite SmartTexts appear.
    - Additionally, when you search for a SmartText in the **Insert SmartText** field, only your favorites appear. If you can't find the SmartText you need on your Favorites tab, select the Encounter Matches tab and search for it in the **Match** field.
6. Click **Accept** to insert the SmartText in your note, or click **Cancel** to save your favorite selections without inserting them into your note.

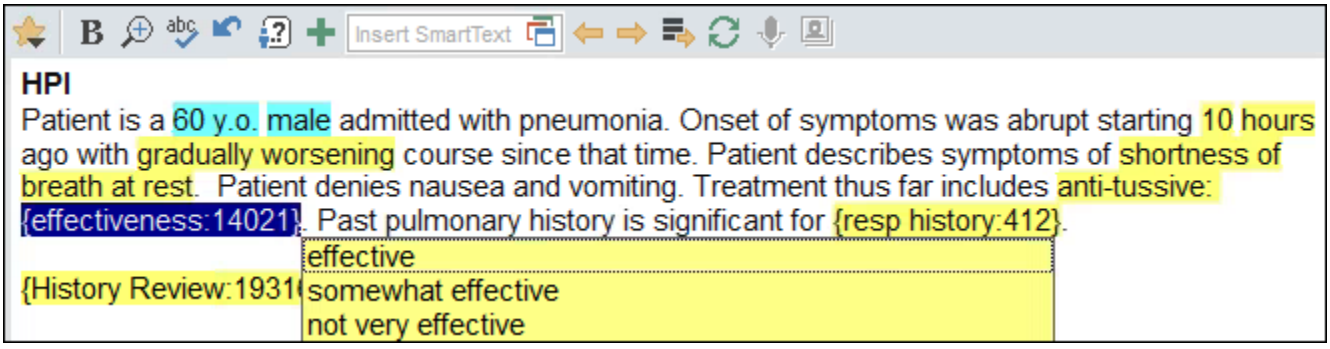


Use SmartPhrases and SmartLinks

Use a SmartPhrase

SmartPhrases allow you to type a few characters that automatically expand to a longer phrase or paragraph. For example, typing ".aaa" expands to "abdominal aortic aneurysm." Typing ".hpipneu" and selecting the HPIPNEUMONIAGEN SmartPhrase expands to a long paragraph.

1. In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name (".aaa"). As you type, a list of matching SmartPhrases and SmartLinks appears.
2. Use the arrow keys to select the SmartPhrase you want to use in your note and press **Spacebar** to insert it.
3. Complete any SmartLists and wildcards (***) in the SmartPhrase.

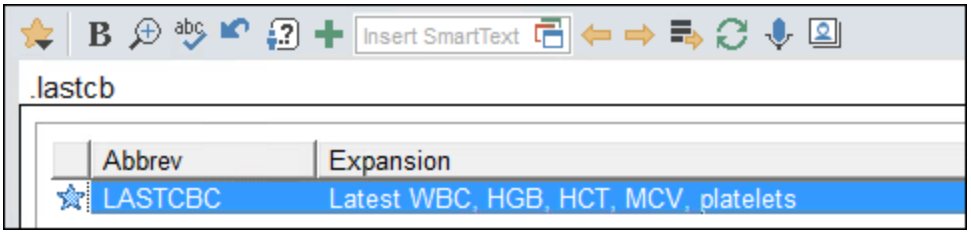


> A wildcard (***) is a placeholder. Press **F2** to jump to a wildcard and type over it with the text you want to add, or delete it.

Use a SmartLink

SmartLinks help you write notes quickly by pulling, or "linking," information from the patient's chart directly into your documentation. For example, typing ".lastcbc" pulls in the patient's last CBC result.

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

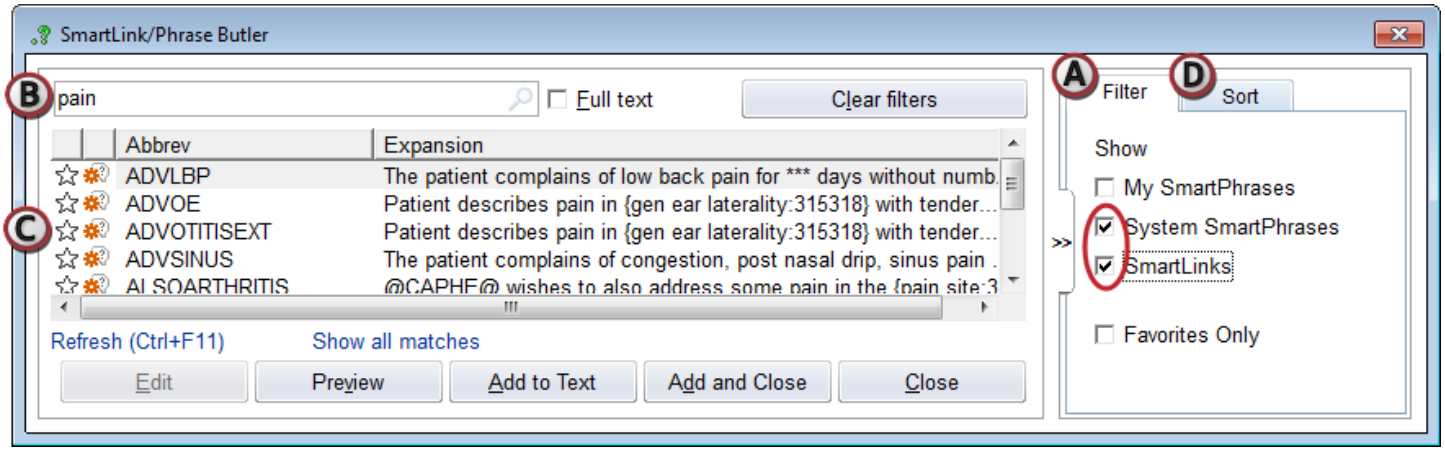
1. Click on the SmartTools toolbar. The SmartLink/Phrase Butler opens and any SmartPhrases you've created appear. If none appear, select **System SmartPhrases** to see all available phrases.
    - The **Abbrev** column shows you what to type after the period (.) to use the phrase or link in a note.
    - 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.

Pull lab results into your note with SmartLinks

You can use SmartLinks to pull a patient's recent lab results into your notes. By setting different parameters, you can specify which 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.

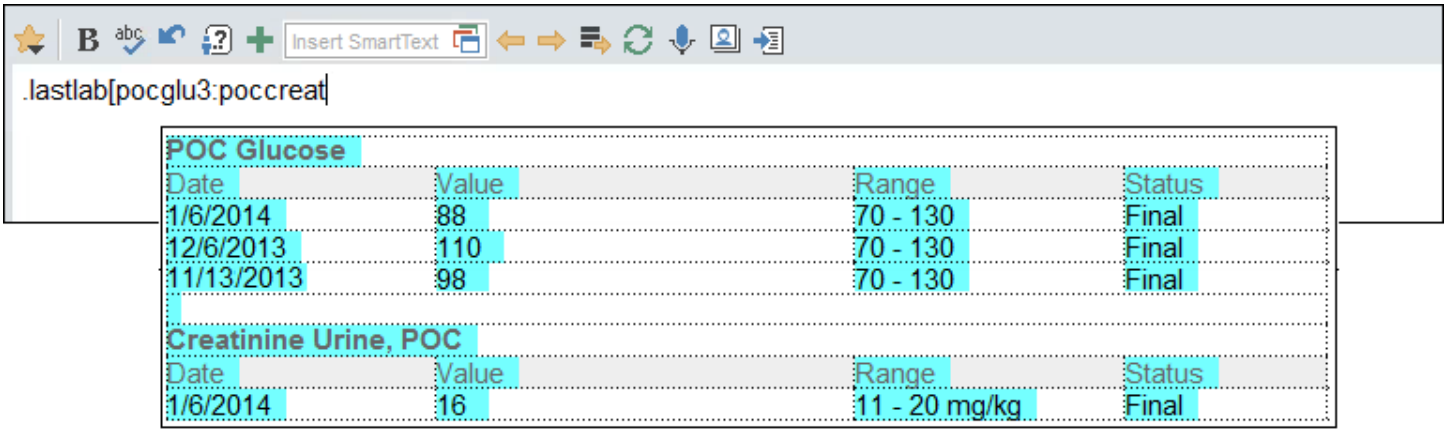
1. In Chart Review, select the **Labs** tab and select a result for the component you're interested in.
2. Click **Preview** to see the result report in the preview pane.
3. Scroll to the **View SmartLink Info** section at the bottom of the report and click the lab component link.
4. Note the entry in the Base Name column of the table. This is the base name that you can use with the LASTLAB SmartLink to pull results for this component into your note.

Pull in results for specific components

To keep your note brief, use the LASTLAB SmartLink to pull in results for specific components. The LASTLAB SmartLink pulls in the name of the component followed by a table listing the date, result value, reference range, and status of the result, as well as any comments entered with the result.

In your note, place your cursor where you want to insert the results, enter ".lastlab[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 ".lastlab[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 ".lastlab[BASENAME".
- To insert results for multiple components, separate them with commas. For example, enter ".lastlab[pocglu:3,poccreat" to insert the patient's last 3 POC glucose results and her most recent POC creatinine result.



To insert a smaller table that includes only the date and component value, use the LASTLABX SmartLink. Follow the instructions above to set parameters for the LASTLABX SmartLink.

For additional instructions on using the LASTLAB SmartLink 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

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 LASTLAB SmartLink instead to pull in results for specific components.

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 from six months back to the date of the current encounter. Replace "M" with "D", "W", or "Y" to specify days, weeks, or years, respectively.
- The second parameter controls what information appears. Leave this parameter blank to pull in the component name, value, reference range, and status of each result. For example, enter ".getlabs[6m". Enter "1" to pull in all of the above information except for comments. Enter "2" to pull in only the component name and value of each result.

Create a SmartPhrase to reuse text you commonly type

If you often type the same phrases and sentences while charting, create a SmartPhrase to save time in the future.

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 ✚. The SmartPhrase Editor window appears.
3. In the **Name** field, enter a short, intuitive name for your SmartPhrase. This is the name you'll type to insert the SmartPhrase in a note.
    - You can't include spaces or symbols in the name.
    - <Tip: Preface the name with your initials so you can find it easily.>
4. Enter a summary of your SmartPhrase in the **Short Description** field.
    - When you search for your SmartPhrase, this description appears in the results after the SmartPhrase name.
5. If you want to make your SmartPhrase available to other users, designate them on the **Owners & Users** tab.
    - Owners can update the shared SmartPhrase. Users can only use the SmartPhrase.
6. Click **Accept** to save and close your new SmartPhrase.
7. 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. Open a new note.
2. Click ✚ to open the SmartPhrase Editor.
3. Click to open a list of SmartTexts. Search for the SmartText you want to edit and click **Accept**. The SmartText appears in the SmartPhrase window.
4. Edit the text to reflect your preferences.
5. Follow steps 3-6 of the "Create a SmartPhrase from text you type" section of this guide to name and save your new SmartPhrase.

Customize your SmartPhrases

To write notes more efficiently, add SmartLinks and SmartLists to your personal SmartPhrases. You can also add synonyms to make your SmartPhrases easier to find.

To edit a SmartPhrase you created, click **Personalize** on the main toolbar and select **My SmartPhrases.**

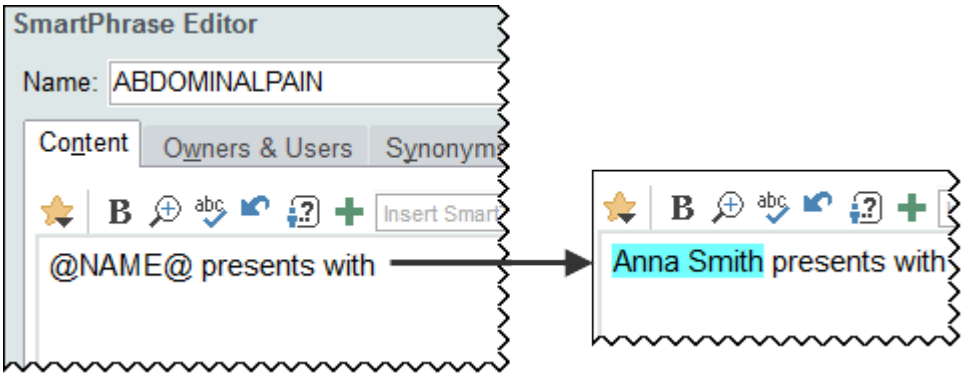
The SmartPhrase List activity opens and a list of your personal SmartPhrases appears. Double-click the SmartPhrase you want to edit. The SmartPhrase Editor opens, and you can begin customizing your SmartPhrase.

> You can delete your duplicate or unused SmartPhrases from the SmartPhrase List activity. Select the SmartPhrase you want to delete and click **Remove**.

Add a SmartLink to pull in patient-specific information

Use SmartLinks to pull information from another part of the patient's chart into your SmartPhrase, such as the patient's name or last CBC results.

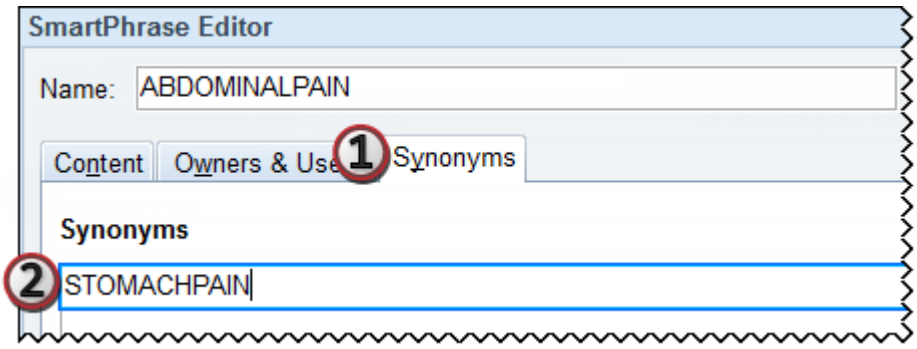
1. In the location where you want the SmartLink to appear, enter a period followed by the first few letters of the SmartLink's name. A list of matching SmartLinks appears.
2. Double-click a SmartLink to add it to your SmartPhrase. The SmartLink appears in your SmartPhrase between @ symbols, such as @NAME@.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



Add synonyms to quickly find your SmartPhrases

Add synonyms to make your SmartPhrases easier to find. When writing a note, you can pull in your SmartPhrase with its name or a synonym.

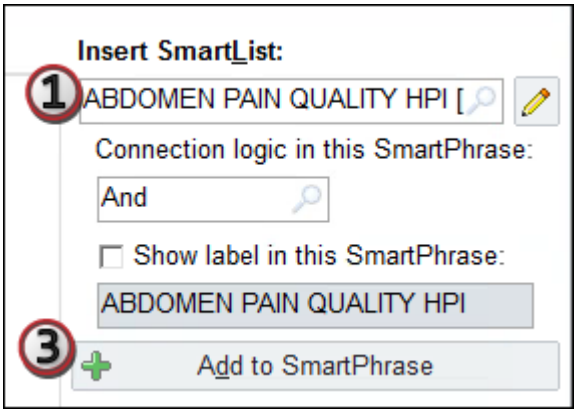
1. Select the **Synonyms** tab.
2. In the **Synonyms** field, enter any other names you might use to search for this SmartPhrase. For example, you might name a SmartPhrase ABDOMINALPAIN and include a synonym of STOMACHPAIN.
3. Click **Accept**. Click **Close**. In the future, you can pull in the SmartPhrase by typing a period followed by either the SmartPhrase name or the synonym.



Add a SmartList to select from a predefined list of choices

Use SmartLists to select from a list of common choices when writing your note. For example, add an abdominal pain SmartList in a SmartPhrase so you can select a different pain level each time you use the SmartPhrase to chart the patient's progress over time.

1. In the **Insert SmartList** field on the right, enter the first few letters of the SmartList and press **Enter**. The SmartList window opens, and a list of matching SmartLists appears.
2. Double-click the SmartList you want.
3. Click **Add to SmartPhrase** to insert the SmartList into your SmartPhrase. The SmartList appears in your SmartPhrase in braces.
4. Click **Accept**. The next time you use this SmartPhrase, you must make selections from all included SmartLists before you can sign the note.

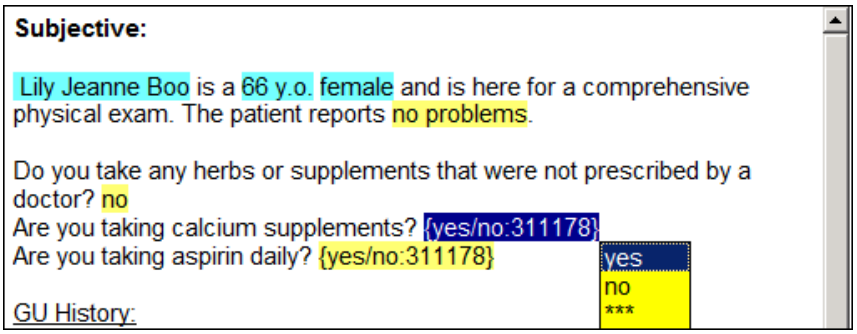


Use SmartLists

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 highlight the next SmartList or wildcard (***) in your note. Some values in a SmartList might be selected for you.
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.



Try the mnemonic "left to pick, right to stick" to remember which mouse button to use.

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**.

Use keyboard shortcuts to complete SmartLists. With a SmartList selected, press **Up Arrow** and **Down Arrow** to move through the list. Press **Spacebar** to select a choice. Press **Enter** to accept your choices and move to the next SmartList or wildcard (***).

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