Anesthesia Provider User Settings Guide

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.

Settings priorities

During labs, start with the Pre-Live sections of this guide. Focus first on:

- Creating NoteWriter macros for:
  - Pre and post evaluations
  - Procedure notes
  - Positioning and checklist documentation
- Saving Order Sets you use commonly as favorites
- Customizing these Order Sets to contain your preferred orders
  - You can create multiple versions of the same Order Set to have different variations

If you have time, complete the rest of the Pre-Live topics.

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

You can use this guide to configure settings the system to better fit your needs. Updating your settings is an essential part of the training process, as it allows you to configure the system as you want it to work for you. For example, you can change the way information appears, create custom notes, and make it easier to find your commonly used orders. The end goal is to allow you to spend less time completing work in the EMR and more time working with your patients.

Each section contains a brief description of a setting followed by instructions to complete the associated task. Work through this document and consult the lab facilitator if you get stuck.

Save your favorite Order Sets

To quickly access your commonly-used Order Sets, save them as favorites.

1. Open an Order Set that you commonly use.
2. Right-click the Order Set name and select **Add Order Set to Favorites**.
3. To open an Order Set from your favorites list, go to the **Orders** tab of the sidebar and click **Order Sets**. Your favorites list appears on the left. Your favorites also appear at the top of your preference list.

> To delete an Order Set from your favorites, right-click it and select **Remove from Favorites**.

Create your own version of an Order Set

> Watch POSS025: Order Set Personalization to see the benefits of updating this user setting.

If you often need to change details in an Order Set, you can create your own version of the Order Set, called a User Order Set. After you open a User Order Set for a patient, you can further customize the details for that patient.

1. Open an Order Set that you want to customize.
2. Click **Manage User Versions** and select **Create My Version**.
3. Enter a name that will help you remember this version of your Order Set.
   - For example, enter Mild Pneumonia. The version name you enter appears only to you and not to other physicians, so enter a name that makes sense to you.
4. Click the order details link to customize details such as the dose, frequency, and rate.
5. Select or clear the check box next to an order to customize which orders are selected automatically.
6. Click **Accept**. Your User Order Set is now open for you to use with the current patient and available from your favorites list for easy access in the future.

Create multiple versions of an Order Set

You can have different Order Sets for variants of the same problem. For example, you might create MRSA and pseudomonas variants of a pneumonia Order Set. You can do this without opening a specific patient's chart.

1. Click **My Tools > User SmartSets**.
2. Search for the Order Set you want to create a new version of, and click **New Version**.
3. Enter a name for your Order Set and edit the details as needed.
4. Click **Accept**. When you look up the Order Set in the future, a window will appear prompting you to choose the version you want to use.

Add another clinician's Order Set as a favorite

If another clinician created a version of an Order Set that you like, add it to your favorites list for easy access.

1. Open a patient's chart and navigate to the **Orders** activity.
2. In the sidebar, enter the name of your colleague's User Order Set and press **Enter**.
3. Right-click the Order Set you want to add and select **Add to Favorites**.

!	You can't create your own version of an Order Set that you are borrowing from another user.

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. Click **My Tools > 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. Click **My Tools > 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. Click **My Tools > 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 a NoteWriter macro to record your common findings

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 or progress 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.

Note that when you create a macro, it applies only to the SmartBlock you have selected at the time, rather than the entire note. For example, an ROS macro is solely an ROS macro, not an ROS and Physical Exam macro.

Create a macro based on a note

Follow these steps to create a macro based on a specific note you've written.

1. After writing a note in NoteWriter, click the arrow next to the button and select **Create macro from current data**.
2. In the Create Note Macro window, enter a name for your macro.
   - 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. If you want to make changes to your macro before saving it, click **Accept and Edit.**
   - In the Macro Editor, edit the macro by selecting any other items that you commonly record.
4. When your macros is ready, click **Accept** to make your macro available for use. Note that if you made any changes in the editor, they are not automatically applied to your note from step 1.
5. To apply this macro in the future, go to the NoteWriter tab for the type of macro you created and click the button for your macro in the toolbar.

> If you have multiple macros for a tab, select the **Set as primary macro** check box in the editor to make your most commonly used macro appear at the top of NoteWriter's macro list.

Create a macro from scratch

1. In NoteWriter, click the arrow next to the button and select **Create new macro**.
2. In the Create New Macro window, give your new macro a name, enter any age and sex restrictions, and click **Accept**.
   - For example, you can make the macro 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.
3. In the 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.
4. Make sure the **Released** check box is seclected and click **Accept**. Your macro is now available for use.
5. To apply this macro in the future, go to the NoteWriter tab for the type of macro you created and click the button for your macro in the toolbar.

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.

Create a macro for a procedure note

To speed up intraprocedure documentation, you can create macros for procedure notes, such as an airway note.

1. Click **My Tools**.
2. Select **Macro Manager (NoteWriter)**.

3. Click **Create New Macro.**
4. Select **Form.**
    - This makes this macro a procedure note macro instead of a macro for other types of notes, like a pre-eval**.**
5. In the **Macro Caption** field, enter the name for your macro.
6. In the **Form** field, enter the name of the SmartForm you want to create a macro for.
    - For example, enter "airway" for an airway note.
7. Click **Accept**.
8. Select the buttons and fill in the fields with the desired documentation.
9. Click **Accept**. The macro will now appear when you click **Apply Macro** in the appropriate type of procedure note.

Here are common procedure note SmartForms you might want to create a macro for:

- <AN Anesthesia Airway>
- <Anesthesia Block>
- <Anesthesia Block Epidural>
- <WAS Anesthesia Blood Patch>

Create a checklist or position macro

To create a macro for use when documenting the checklist or patient positioning:

1. Click the **Epic** button, search for "flow" and select the Anesthesia Flowsheet Macro Editor.
2. Enter the template you want to create a macro for.
    - For the checklist, enter "<AN Checklist>".
    - For positioning, enter "<AN Positioning>".
3. Click **Create Macro**.
4. On the far right, enter display name for the macro.
    - The display name is what you'll see on your screen.
5. Use the buttons in the middle of the screen to choose the documentation that will pull in when you apply the macro.
6. In the **Share with users** field, enter the name of anyone you want to share your macro with.
7. Click **Release**.
8. Click **Close**.

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.

> 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.

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

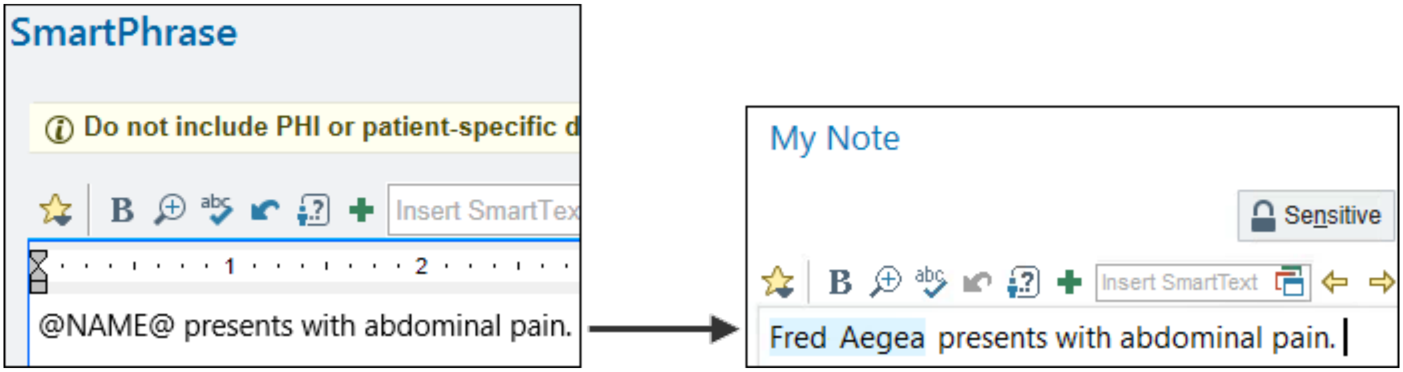
To edit a SmartPhrase you created, Click **My Tools** and open **My SmartPhrases**. Double-click the SmartPhrase you want to edit.

> 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

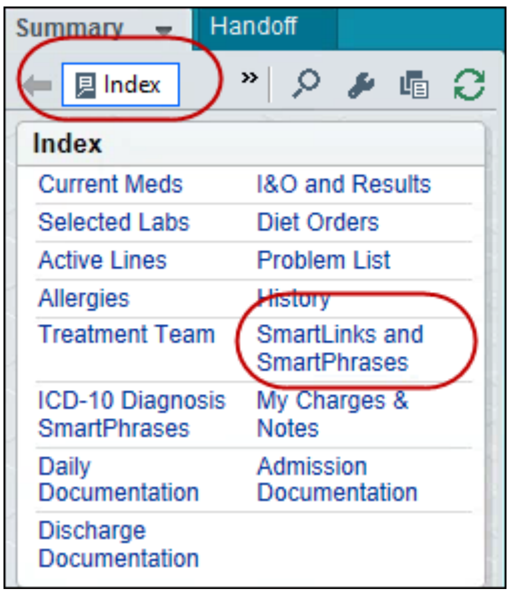
1. In the location where you want the SmartLink to appear, enter a period followed by the first few letters of the SmartLink's name. A list of matching SmartLinks appears.
2. Double-click a SmartLink to insert it. The SmartLink appears in your SmartPhrase between @ symbols, such as @NAME@.

3. Click **Accept**. The next time you use this SmartPhrase, patient-specific information appears where you added the SmartLink.



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.

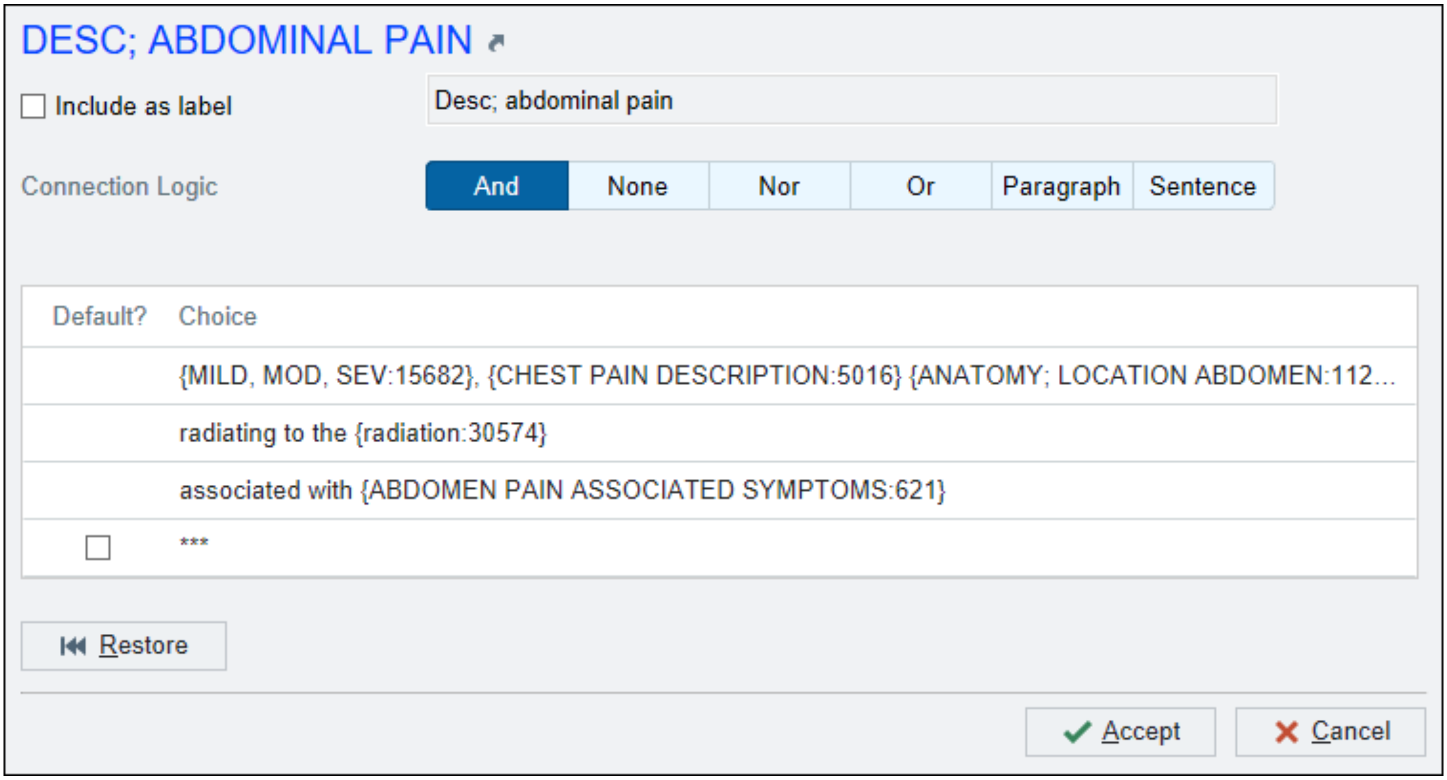
1. Open one of your SmartPhrases.
2. In the **Synonym** field on the right, enter any other names you might use to search for this SmartPhrase. For example, you might name a SmartPhrase ABDOMINALPAIN and include a synonym of STOMACHPAIN.
3. Click **Accept**.

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**.

Post-Live

Save an intraprocedure macro as a favorite

If there are macros you use often, you can save the macro as a favorite, making it easier to find when you need to use it again.

1. In the Intraprocedure activity, touch **Macro**.
2. Select the macro you want to save as a favorite.
3. Touch **Add to Favorites**. The macro appears on the **Favorites** tab.

Create a your own intraprocedure macro

1. Click the **Epic** button and, search for "Macro Editor".
2. Select the **Create** tab.
3. Give your macro a name and press **Enter**.
4. Select **Private**.
   - If you want to share your macro with other providers, enter the provider's name in the **Share with users** field.
5. Select the medications, LDAs, events, and reminders you want to pull into the chart from your macro.
   - Add events in the order you want them to appear in the quick event sequence.
   - Add details to any medications you select, such as the unit or route.
6. When your macro is complete, click **Release** and then **Accept**. Your macro appears on the **Personal** tab of the Macro activity.

Update your view of results

Customize the appearance of Results Review so you can easily find the data most relevant to you. The changes you make don't affect other clinicians.

1. In the Results Review activity, click . The User Settings window appears.
2. Customize your Results Review activity. Some popular options include:
   - Change the font size to what's comfortable for you.
   - Control whether new results are highlighted.
   - Determine whether new data appears on the left or right.
   - Filter results based on a specified time range.

Create new patient lists

Create a new patient list to quickly find your group's patients.

1. Click **Edit List > Create My List**.
2. Name your list. We recommend prefacing the name with your initials.
3. Click **Copy** and select a template with the columns you want.

4. Rearrange the orders of the columns to suit your needs by clicking ▲ ▼.
5. Delete any columns you don't want by clicking **Remove**.
6. Add an individual column by selecting it from the **Available Columns** menu and clicking **Add Column**.
7. Add your group's patients to the list: Under **Available Lists**, right-click your group's list and select **Send To > your new list**.

ⓘ	To edit a list, right-click it and select **Properties**.

ⓘ	You can print your patient list and take it with you when you round. To do so, click **Print** in the upper-right corner. If you print the list in landscape orientation, the size and order of the printed columns will match your electronic list.

Update your activity tabs

You can update the order of your activity tabs to better fit your personal style. Start by opening a chart.

- To change the order of your activity tabs, click a tab and drag-and-drop it in your preferred location.
- To make a tab stand out, right-click the tab and select **Change Highlight Color**. Select your desired color.
- If you want more space between tabs, for example to make it easier to click on the correct tab, right-click the tab and select **Add Separator**.
- To add activities in your More menu to your tabs, hover over the activity in the More menu and click .

ⓘ	Click elsewhere in the system to customize other features, and click ☆ to mark something as a favorite. For example, click ☆ to add an order to your personal preference list or to make commonly used activities appear when you click the **Epic** button.

Reorganize your main toolbar and Epic menu

1. Organize your main toolbar:
   a. Drag and drop buttons to rearrange them.
   b. Drag buttons to the **Remove from My Toolbar** window that appears when you drag a toolbar button to remove the button from your toolbar.
   c. Right-click an item in the **Epic** menu and select **Add to My Toolbar** to add it to the main toolbar for one-click access. Click menus within the **Epic** menu to expand them.

2. Organize the **Epic** menu:
   a. Right-click an item in the **Epic** menu and select **Add to Pinned Items** to add it to the Pinned section of the menu for quick access.

Sharing 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 Settings	Link to topic
Preference Lists	Copy preference lists from other clinicians
SmartPhrases	Share SmartPhrases
NoteWriter Macros	Share a macro with colleagues
Intraprocedure Macros	Create a your own intraprocedure macro