Inpatient and Outpatient Physician 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.

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
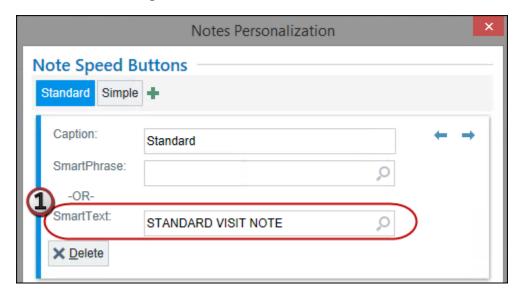
Create your own note templates with SmartPhrases

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.
- Cut other info in the note.
- Separate the Assessment and Plan sections in your note.
- Automatically pull in diagnoses and orders from the visit to populate your Assessment and Plan.
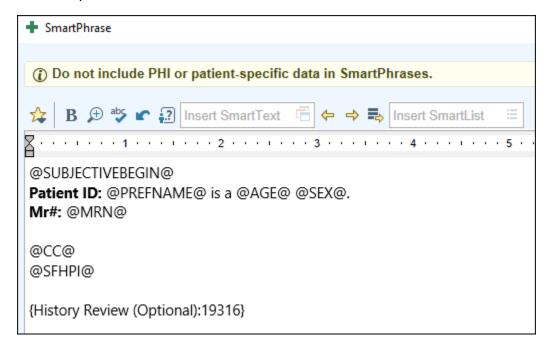
After you make changes to a note template, save it as a SmartPhrase, so you can quickly pull your template into future notes.

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 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 **Insert SmartText** field, enter the name of the note template you recorded in step 1.
5. 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.

6. Add a brief summary of your SmartPhrase in the **Description** field. When you search for your SmartPhrase, this description appears next to the name.
7. Click **Accept** when you're done.
8. To use your new SmartPhrase, type a period followed by the SmartPhrase name, and then press "Spacebar".
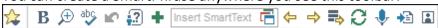
Create a SmartPhrase from text you type

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.

    □   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.
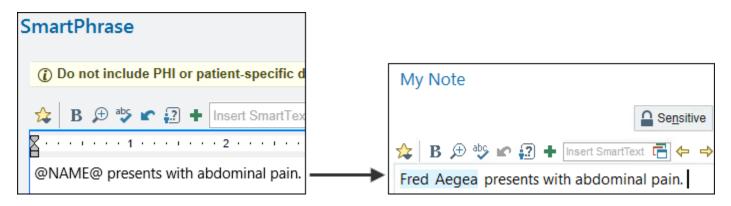
> Add synonyms in the **Synonym** field to make your SmartPhrase easier to find. To see how, refer to Add synonyms to quickly find your SmartPhrases.

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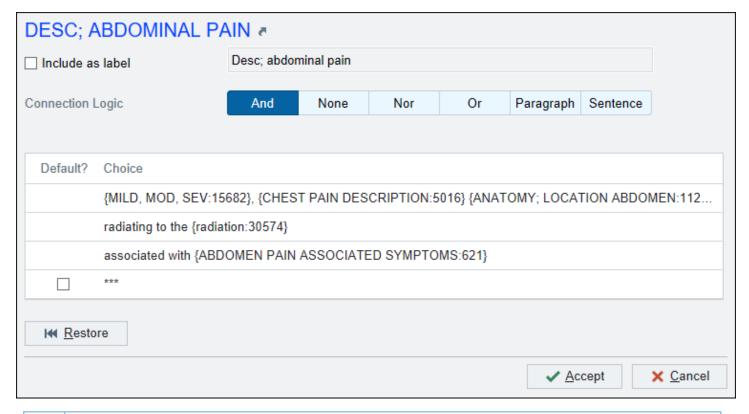
When writing a note, you can pull in your SmartPhrase with its name or a synonym.

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**.

Share SmartPhrases

In the SmartPhrase Editor, use the **Sharing** section to enter the names of any colleagues who should have access to your phrase.

- 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.

> ℹ️ 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.

Save your favorite note 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.
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 in the SmartText Lookup window.

> ℹ️ 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**.

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

Create a NoteWriter macro to record common 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
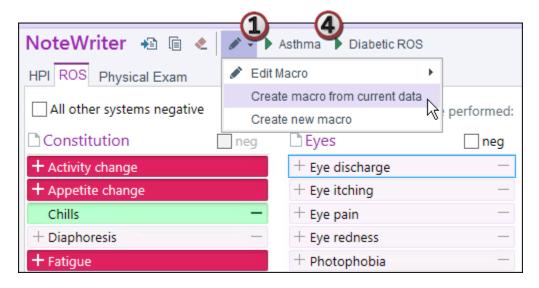
Follow these steps to create a macro on the fly, based on the documentation you've recorded for the current patient.

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.

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.

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.

Follow other clinicians' preference lists

If one of your colleagues already has a great preference list, follow their preference list instead of building one yourself.

1. In the Orders activity, click ✚ **New**.
2. Order and Order Set Search opens. Click ✚ **Follow Users**.
3. Search for the clinician whose preference list you want to follow. When you find them, click ✔ **Accept**.

4. Now, when you look up an order, orders from their preference list appear with a 👥 icon beside it.

5. When you browse for an order in the Order and Order Search, select the checkbox by their name to see only orders on their preference list.

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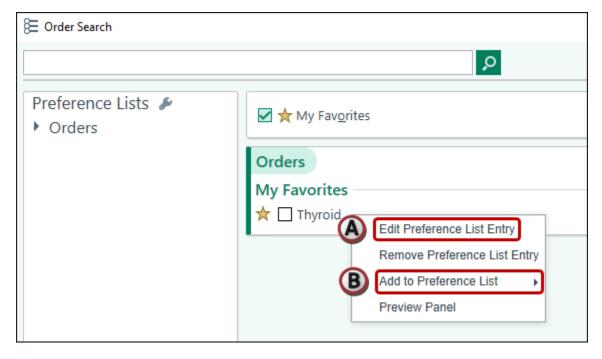
Save time searching for orders that you commonly place together, such as a set of labs. Instead of searching one-by-one for these orders, create an order panel.

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**.

Additional Pre-Live User Settings: Outpatient Physicians

Delegate your work by granting access to your In Basket

If you're going to be out of the office, or if you want support staff to help you handle your In Basket messages, you can grant them access to your In Basket.

Delegate work to support staff

If you want others to be able to see your message and follow up if needed, grant them access to your In Basket. Then, have them attach your In Basket to theirs. For example, you might grant your support staff access so they can handle normal lab results while you focus on abnormal ones. Or, you might grant access to a colleague when you're seeing patients all day without a break, so that he can address any urgent issues.

1. In your In Basket, click 📧 **Attach**.
2. In the Attach Other In Baskets window, select the **Grant Access** tab.
3. In the **User** field, enter the names of anyone who should have permission to access your In Basket and click **Accept**.

> ❗ The people you grant access to must attach your In Basket to theirs to view your messages.

> ℹ️ Remove permission to access your In Basket by deleting the user's name on the **Grant Access** tab of the Attach Other In Baskets window.
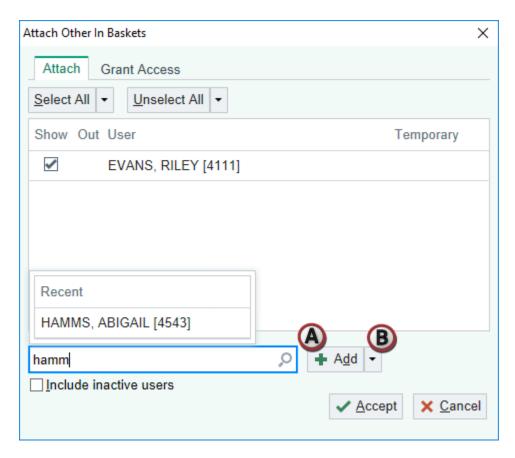
Attach an In Basket to which you've been granted access

After a colleague grants you access to her In Basket, you must attach it to your In Basket to view her messages. This isn't something you need to do now, but it might be useful following go-live if you need to cover for another provider. Just know that the steps to do it are below.

1. In your In Basket, click 👤 **Attach**.
2. In the Attach Other In Baskets window, on the **Attach** tab, enter the name of the person whose In Basket you want to access, and then select one of the following:

   a. ➕ **Add** - This person's In Basket remains attached until you remove the person's name or she removes your access. For example, use this if you always review a physician's normal results messages.

   b. The ▼ next to ➕ **Add**, and then select **Add Until Logout** - This person's In Basket will only be attached until you log out. For example, enter a colleague's name here when she is busy and needs you to cover urgent issues.

3. Click **Accept**. The other person's In Basket is now attached to yours.

> ℹ️ Remove an attached In Basket from yours by deleting the user's name on the **Attach** tab of the Attach Other In Baskets window.

To open an attached In Basket, select the **Attached In Baskets** tab in the lower-left corner of your In Basket.

Complete common tasks in just a few clicks with QuickActions

If you receive In Basket messages that require routine follow-up, you can quickly complete that follow-up using a QuickAction. QuickActions are available for routine letters, result notes, Notes, MyChart messages, and more. For example, in your Results folder, you might have a QuickAction called Abnormal that creates a result note using your standard text, routes it to your preferred recipients, and marks the message as Done in a single click.

- To create a QuickAction on the fly, click **Save as QuickAction** when you're writing a routine letter, result note, Note, MyChart message, or Staff message.
- To create a QuickAction at any time, click the arrow to the right of the ✎ **Manage QuickActions** button on the In Basket toolbar and select the type of QuickAction you want to create.

> ⓘ Include SmartLinks in your text so your message pulls in data for the associated patient when you use a QuickAction.
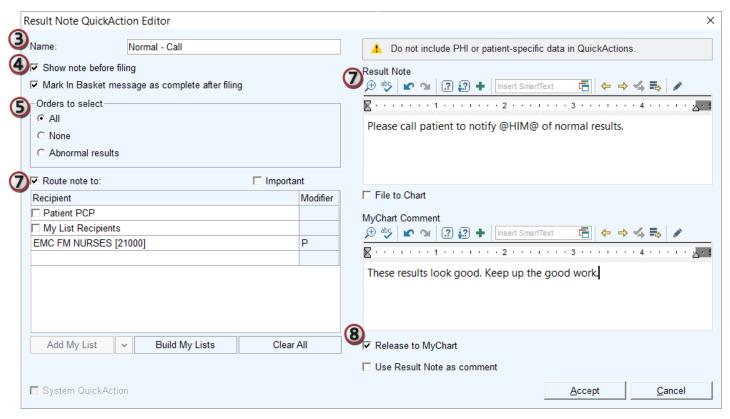
Create QuickActions to write and route result notes

> 🎬 Watch POSS012: QuickActions: Result Notes to see the benefits of updating this user setting.

If you receive Results messages that require routine follow-up, you can write and route your standard result note in a few clicks using a QuickAction. For example, you can create a QuickAction that creates a note asking a nurse to call the patient, sends the note to the nurse pool, and removes the associated Results message from your In Basket.

1. Click ✐ **Manage QuickActions** on the In Basket toolbar to open the QuickAction Manager.
2. Click ➕ **New QuickAction >** 🗐 **Result Note**.
3. Enter a brief name for your QuickAction, such as "Normal - Call", in the **Name** field.
4. Configure this QuickAction to meet your needs:

   ▫ To have a chance to edit the result note before it's filed, select the **Show note before filing** check box.
   ▫ To automatically remove the associated Results message from your In Basket, select the **Mark In Basket message as complete after filing** check box.

5. Specify which results should be attached to your note. In the **Orders to select** section, choose:

   ▫ **All** to attach your notes to all results in a message.
   ▫ **None** if you don't want to attach your note to any results. You can choose results on the fly if you selected the **Show note before filing** check box in step 4. This option is not recommended, because it's faster to locate your note when it's attached to a result.
   ▫ **Abnormal results** to attach your note to only the abnormal results in a message.

6. To send your note to a colleague, select the **Route note to** check box and specify the recipients for your Result Note message. For example, send it to the patient's PCP or to other recipients, like a pool of nurses.
7. Enter your note in the **Result Note** field on the right. Any SmartLinks you use pull in data for the patient when you use this QuickAction.
8. To release the result to the patient, select the **Release to MyChart** check box. You can write a comment for the patient in the **MyChart Comment** field.
9. When you're finished, click **Accept**. A new QuickAction button appears on the report toolbar in all of your Results messages.
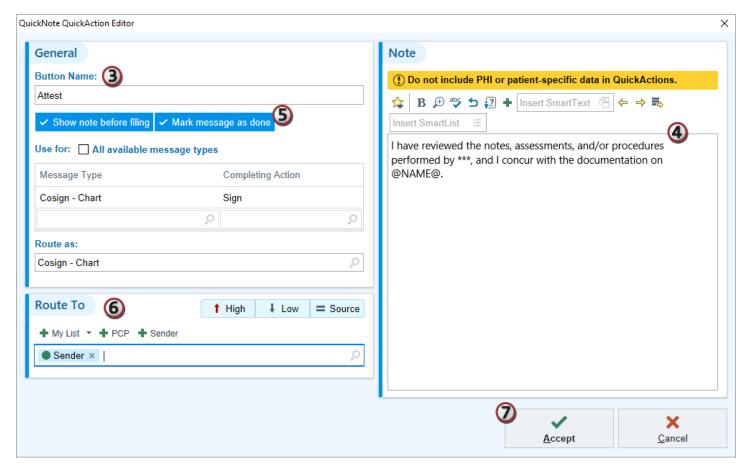
Result Note QuickAction Editor   ✕

③ Name: Normal - Call   ⚠ Do not include PHI or patient-specific data in QuickActions.

④ ☑ Show note before filing   Result Note
   ☑ Mark In Basket message as complete after filing   ⑦ 🔍 abc ↶ ↷ ? ? ➕ Insert SmartText ▯ ⬅ ➡ ✎ ▤ | ✏

⑤ ┌ Orders to select ─────────────┐   X · · · 1 · · · 2 · · · 3 · · · 4 · · · ⬧
   │ ⊙ All   │   Please call patient to notify @HIM@ of normal results.
   │ ○ None   │
   │ ○ Abnormal results   │
   └──────────────────────────────┘

⑦ ☑ Route note to: ☐ Important   ☐ File to Chart

   Recipient   Modifier   MyChart Comment
   ☐ Patient PCP   🔍 abc ↶ ↷ ? ? ➕ Insert SmartText ▯ ⬅ ➡ ✎ ▤ | ✏
   ☐ My List Recipients
   EMC FM NURSES [21000]   P   X · · · 1 · · · 2 · · · 3 · · · 4 · · · ⬧
                                              These results look good. Keep up the good work.

   [Add My List] [▼] [Build My Lists] [Clear All]   ⑧ ☑ Release to MyChart
                                                              ☐ Use Result Note as comment

   ☐ System QuickAction   [Accept]   [Cancel]

> ⓘ Create a result note QuickAction while you're writing a routine result note by clicking **Save as QuickAction**.

Create QuickActions to write routine QuickNotes

Use QuickActions to write and route standard QuickNotes in a few clicks. For example, if you often respond to cosign messages by writing an attestation note, you can create a QuickAction that files the note to the related visit, sends a response to the resident, and removes the associated message from your In Basket.

1. Open a message that includes the **QuickNote** button, such as a Cosign - Chart message. Click 📝 **QuickNote** on the folder toolbar.
2. Click **Save as QuickAction** at the bottom of the QuickNote window to open the QuickAction Editor.
3. Enter a brief name for your QuickAction, such as "Attest", in the **Button Name** field.
4. Enter your message in the text box. Any SmartLinks pull in patient data when you use this QuickAction.
5. Configure the options in the **General** section of the window as needed:

   ▫ To have a chance to edit your note before it's filed to the patient's chart, leave the **Show note before filing** check box selected.
   ▫ To automatically remove the associated message from your In Basket, select the **Mark In Basket message as done** check box.
   ▫ Select which message types the QuickAction can be used for.

6. Configure the options in the **Route To** section of the window as needed:

   ▫ If you'd like, choose a priority for the message. If you don't select an option, the routine priority is used for the QuickNote.

- To send your note to a colleague, select a recipient from the list or enter her name in the **Recipient** field. For example, send it to the patient's PCP or reply to whoever sent you the In Basket message.

7. When you're done, click **Accept**. A new QuickAction button appears on the report toolbar in all messages of this type.
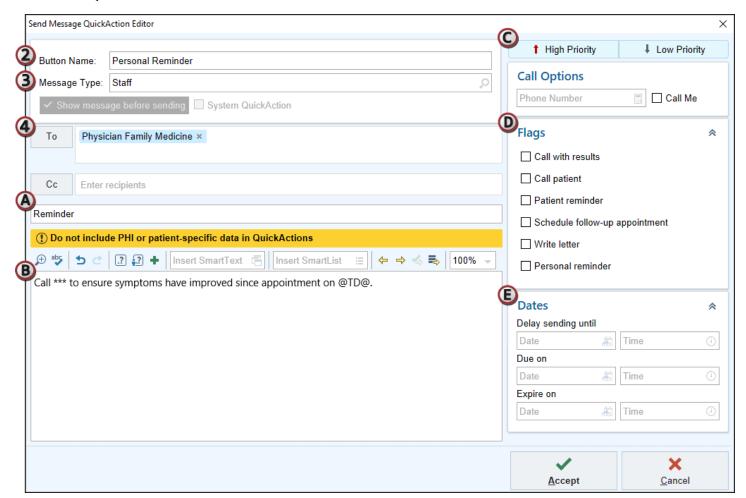

Create QuickActions to send routine staff messages

Use QuickActions to send common messages, such as Staff messages, in a few clicks. For example, you could create a QuickAction to send yourself a reminder Staff message in a week to make sure that a patient's symptoms have improved. Any QuickActions you create are available from In Basket and within a patient's chart, so you can quickly send messages about specific patients.

1. On the In Basket toolbar, click the arrow to the right of the ✏ **Manage QuickAction** button and select ✉ **New Message**.
2. Enter a brief name for your QuickAction, such as "FU 1 wk," in the **Button Name** field.
3. In the **Message Type** field, select the type of message you want to send.
4. Enter your preferred recipients, such as yourself or your clinic's nurse pool, in the **To** and **Cc** fields.
5. Configure the rest of the fields to meet your needs. You'll have a chance to change these settings before sending your message:

   a. Enter a subject for your message. Note that this field does not appear for all types of messages, such as Patient Call Back.
   b. In the text box, enter a template for your message using free text or SmartPhrases. Or search for a SmartText in the **Insert SmartText** 🗗 field.

c. Optionally, assign a priority to your message of **High** or **Low**.

d. If you want to distinguish these messages with a flag, select one from the Flags list.

e. In the Dates section, enter the date you want your message to be sent. If you leave this field blank, the message is sent immediately. Use date shortcuts, such as "t" for today and "w" for week. For example, to have the system send your message in a week, enter "w+1".

6. When you're done, click **Accept**. Use your new QuickAction in the following places:

□ In your In Basket, by selecting it from the ⊠**+New Message** menu on the In Basket toolbar.

□ In a patient's chart, by clicking ▼ to the right of the activity tabs and then selecting the QuickAction. When you use your QuickAction from a patient's chart, the patient is automatically attached to your message. If you don't want the patient to be tied to your message, access your QuickAction from In Basket.

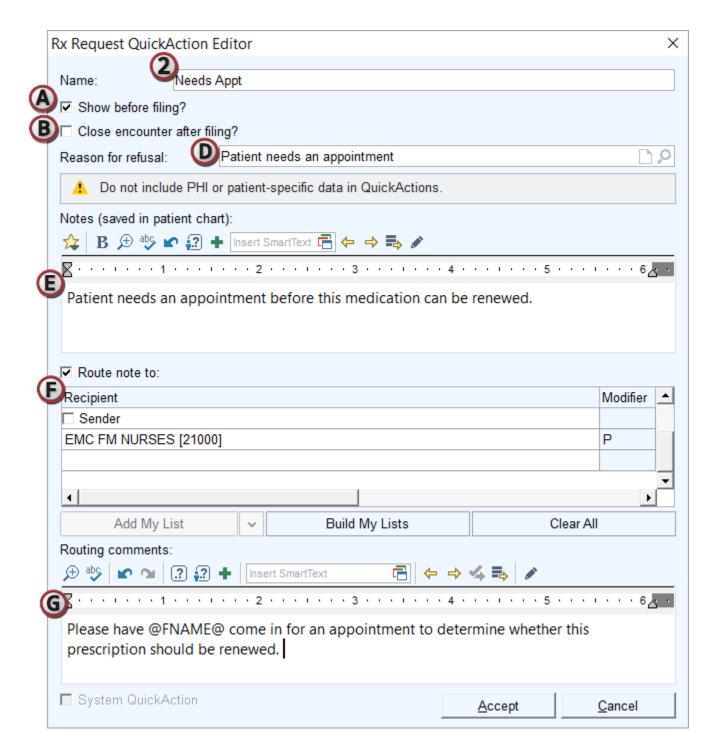# Create QuickActions to respond to routine Rx Requests

▶ Watch POSS044: QuickActions Rx Request to see the benefits of updating this user setting.

Respond to routine Rx Request messages in a few clicks using QuickActions. For example, you can create a QuickAction that refuses a request, indicates that the patient needs an appointment, files a note to her chart, and removes the associated message from your In Basket.

1. On the In Basket toolbar, click the arrow to the right of the ✏ **Manage QuickActions** button and select ✖ **Rx Request Refuse** or ✔ **Rx Request Approve**.
2. Enter a brief name for your QuickAction, such as "Needs Appt", in the **Name** field.
3. Configure the QuickAction to meet your needs:

   a. To have a chance to edit your response before it's sent, select the **Show before filing** check box.
   b. To automatically close the refill encounter after sending your response, select the **Close encounter after filing** check box. This option is helpful if no additional follow-up with the patient is necessary.
   c. For approvals, select the number of refills to approve. Select **As requested** to approve all refills, or select **Other** and enter the number of refills you want to sign.
   d. For refusals, optionally enter a reason, such as "Patient needs an appointment".
   e. In the **Notes** field, optionally write a note that will be filed in the patient's chart. Any SmartLinks you use pull in data for the patient when you run this QuickAction.
   f. To send the note to a colleague, select the **Route note to** check box and specify the recipients, such as the person who sent the request.
   g. In the **Routing comments** field, enter any comments that you want to appear in the Rx Response message that's automatically sent to your nurse pool.

4. When you're done, click **Accept**. A new QuickAction button appears on the report toolbar in all of your Rx Request messages.

Rx Request QuickAction Editor   ✕

② Name: Needs Appt

Ⓐ ☑ Show before filing?

Ⓑ ☐ Close encounter after filing?

Reason for refusal: **Ⓓ** Patient needs an appointment

⚠ Do not include PHI or patient-specific data in QuickActions.

Notes (saved in patient chart):

⭐ | **B** 🔍 ᵃᵇ꜀ ↶ ⟨?⟩ ➕ | Insert SmartText ⧉ ⬅ ➡ ➡ ✏

Ⓔ ⌨ · · · · 1 · · · · 2 · · · · 3 · · · · 4 · · · · 5 · · · · 6

Patient needs an appointment before this medication can be renewed.

☑ Route note to:

Ⓕ

Recipient	Modifier
☐ Sender	
EMC FM NURSES [21000]	P

Add My List	⌄	Build My Lists	Clear All

Routing comments:

🔍 ᵃᵇ꜀ | ↶ ↷ | ⟨?⟩ ⟨?⟩ ➕ | Insert SmartText ⧉ | ⬅ ➡ ⚡ ➡ | ✏

Ⓖ ⌨ · · · · 1 · · · · 2 · · · · 3 · · · · 4 · · · · 5 · · · · 6

Please have @FNAME@ come in for an appointment to determine whether this prescription should be renewed. |

☐ System QuickAction   [Accept]   [Cancel]

Put key reports on your schedule

1. Click 🔧 on the right side of the report toolbar.
2. In the **Report** field, enter the report that you want to appear as a button on the toolbar.

> ⓘ Some examples of reports you might want to include here are:
> - **Rooming Report**: Shows everything documented during the rooming process, including vitals and notes.
> - **Last Note in My Specialty**: Shows the last note for a patient from your specialty, so you can review it before you go into the room.

3. In the **Button Name** field, enter a brief name, so more buttons can fit on the toolbar.
4. Continue to add reports as needed.

   □ Click ▲ and ▼ to change the order in which the buttons appear on the toolbar.

5. Click **Accept** to add the buttons to your toolbar.

> ℹ️ To add the report you are currently viewing to the toolbar, click 🔧 and then click **Add Current**.

Choose which info appears in your schedule

> 🎬 Watch [POSS027: Customizing Patient Lists and the Schedule](#) to see the benefits of updating this user setting.

Customize your schedule to see the patient information you find most useful. Consider adding or removing columns and changing the order in which they appear to suit your personal preferences.

1. Go to your schedule. Click the name at the top left of your schedule. In the window that appears, select a schedule under the **My Schedule** group.
2. Click ⚙️ to customize your schedule.

   □ To reorder your columns, select one from the **Selected Columns** list and click ▲ or ▼ to move it.
   □ To add a column, select it from the **Available Columns** list and click ➕ **Add Column**. For example, select the **Meds Due** column to see whether the patient has a medication due, or select the **Referring** column to see the referring provider for the visit.
   □ To remove a column, select it from the **Selected Columns** list and click ➖ **Remove**. For example, remove the **Provider** column if your schedule lists only your visits.

3. Click **Accept** when you're finished.

> ℹ️ Use the **Filter by Status** button at the top of your schedule to apply filters or change which appointments you see so you can focus on the relevant appointments at the appropriate time. Look to the right of the button to see how many appointments are hidden. The system automatically remembers your settings for filters on present and past dates.

> 📄 Change the report buttons that appear below your schedule by clicking the wrench on the report toolbar. Refer to [Put key reports on your schedule](#) for more information.

Create your own version of a SmartSet

If you often need to change details in a SmartSet, you can create your own version of it. After you open your version of the SmartSet for a patient, you can further customize the details for that patient.

1. Open a SmartSet or Express Lane 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 SmartSet.

▫ For example, enter Lower Back Pain. The version name you enter appears only to you and in search results the name appears as <name of SmartSet> (User - <version name>).

4. Select or clear the check box next to items such as medications, orders, diagnoses, or a level of service to customize which ones are selected automatically.
5. For medications and orders, click ✏ to customize order details, such as the sig or the order class.
6. Click the link next to a note or a follow-up to edit the note text or follow-up details.
7. Click **Accept**. Your User SmartSet is now open for you to use with the current patient and available from your favorites list for easy access in the future.

> ⓘ You can also create or edit your version of SmartSets outside of a patient chart by going to **My Tools > User SmartSets**.

Use or Copy a Colleague's User SmartSet

You can use a colleague's version of a SmartSet in a patient chart, and if you wish, you can make a copy and edit your own version of a colleague's SmartSet.

1. In a patient's chart, in the SmartSets section, click **Add**. The SmartSets Search window appears.
2. In the **Search SmartSets by User** field, enter the name of the person whose User SmartSets you want to see.
3. Select one and open it.
4. If you want to edit a copy of the user version, click the **Manage My Version** link and select Copy This Version to save your own copy.
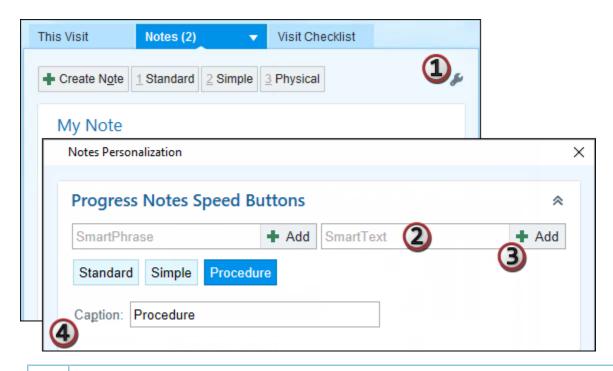
Jump start routine notes with speed buttons

> 🎬 Watch [POSS019: Personalizing Notes](POSS019:%20Personalizing%20Notes) to see the benefits of updating this user setting.

Add speed buttons to the Notes sidebar or activity so your most commonly used note templates are available in one click. You can create a button that starts a new note with the SmartPhrase or SmartText of your choice.

1. Click 🔧 in the upper-right corner of the Notes sidebar, activity, or navigator section.
2. In the window that appears, search for a SmartPhrase or SmartText.
3. Click ➕ **Add** to add it as a new button.
4. In the **Caption** field, enter the name that you want to appear on the button.
5. Click and drag the buttons to re-order them.
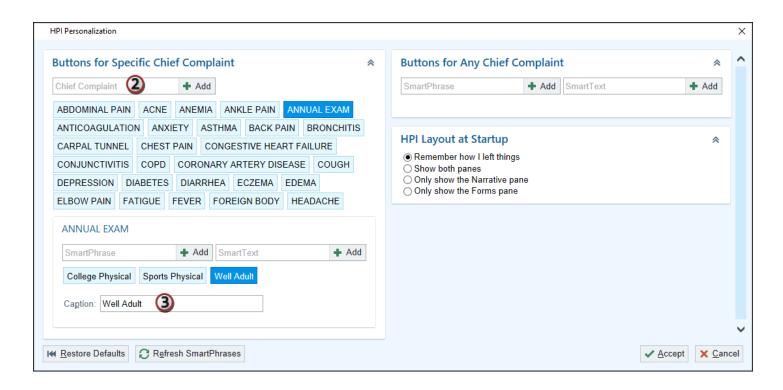6. Click ✔ **Accept.** The button appears at the top of your Notes section.

> ⓘ You can also click 🔧 to specify other note-writing preferences. For example, you can specify a more general SmartText or SmartPhrase that's automatically pulled in whenever you click ➕**Create Note**.

Add speed buttons to pull in common narrative text in one click

Just like in the Notes sidebar, these speed buttons pull in a SmartPhrase or SmartText. Keep your screen clutter-free by associating a button with a specific chief complaint. That way, it only appears when you need it.
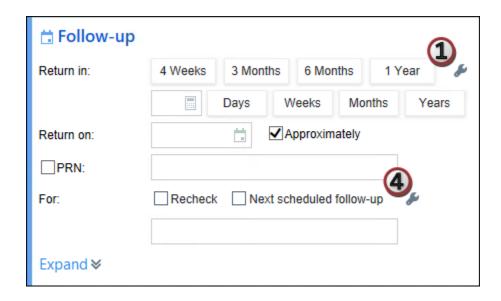
1. Click 🔧 at the top of the **HPI** form.
2. In the **Buttons for Specific Chief Complaint** section, enter the complaint related to your text in the **Chief Complaint** field.
3. Enter a short name for your button in the **Caption** field.
4. Enter the SmartPhrase or SmartText you want to use in the appropriate field.

   □ You can add multiple SmartPhrases or SmartTexts for one chief complaint.
   □ Click and drag the buttons to rearrange the order.

5. Click **Accept** to save your button and add it to the top of the Narrative field.
6. To create a button that appears regardless of the patient's chief complaint, use the **Buttons for Any Chief Complaint** section.

Set your most common follow-up intervals and reasons for follow-up as speed buttons

You can set up the most common follow-up times as speed buttons so that you can ask a patient to return in a specified amount of time with one click. You can also make speed buttons for common follow-up reasons. This way, you can tell a patient to "Follow up in 6 months for recheck" in two clicks. This information will then appear on the patient's After Visit Summary, and can also be pulled into any note with the .FOLLOWUP SmartLink.

1. In the **Follow-up** section, click 🔧 next to the follow-up intervals.
2. Enter a number and frequency (days, weeks, months, etc.) for each button you would like to create. You can also reorder your buttons in this window.
3. Click **Accept**. These buttons now appear as options on all of your patients.
4. Click 🔧 next to the follow-up reasons.
5. Enter additional reasons for follow-up that you would like to be able to choose for your patients.
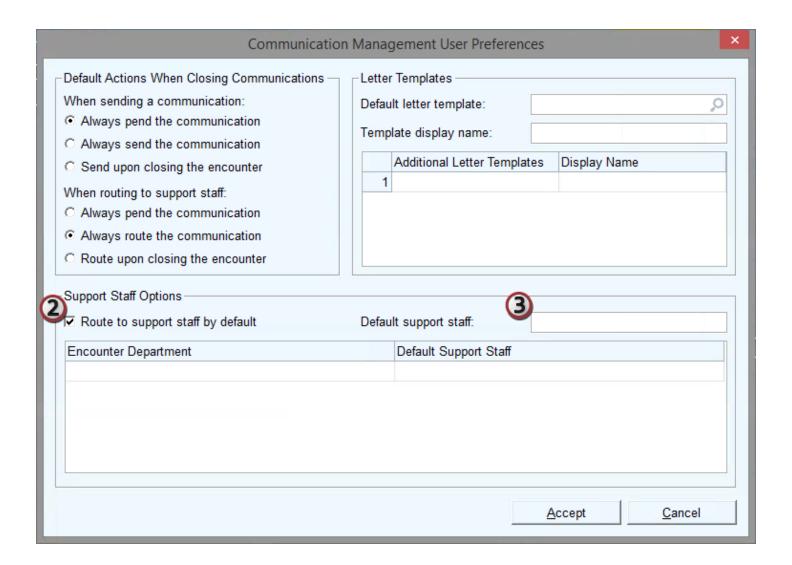6. Click **Accept**. These buttons now appear as options on all of your patients.

Route your letters to support staff

Whenever you generate a letter, you can configure it to be automatically routed to a group, such as a nurse pool, so that members of the group can finalize and send the letter for you. If you are commonly sending letters to a referring provider, configuring this could save you 20-30 seconds per visit.

1. In the Communications section, click 🔧.
2. Select the **Route to support staff by default** checkbox.
3. In the **Default support staff** field, enter the pool or support staff person that should be responsible for sending out your letters.

   a. If a pool should be responsible, type "P" followed by a space and then the pool name. Consult with your User Settings Lab facilitator if you are uncertain of the name of your pool.

> ℹ️ If you send the same letter a majority of the time, save clicks and time during each visit by setting a default letter template that will open as soon as you click ➕ **New Communication**. Enter the template you want to use as your default in the **Default letter template** field.

Communication Management User Preferences

Default Actions When Closing Communications

When sending a communication:
- ◉ Always pend the communication
- ○ Always send the communication
- ○ Send upon closing the encounter

When routing to support staff:
- ○ Always pend the communication
- ◉ Always route the communication
- ○ Route upon closing the encounter

Letter Templates

Default letter template: [🔍]

Template display name: [   ]

	Additional Letter Templates	Display Name
1		

Support Staff Options

② ☑ Route to support staff by default

③ Default support staff: [   ]

Encounter Department	Default Support Staff

Accept   Cancel

28

Additional Pre-Live User Settings: Inpatient Physicians

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.

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

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.

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.

> ⓘ To edit or delete a User Order Set, look it up in the **User SmartSets** activity and select **Edit This Version**.

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. Use Chart Search to open the **User Order Sets** activity.
2. Click ▼ to expand My User Order Sets, select the Order Set you want to create a new version of, and click **Create 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.

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.

Share patient lists

If another user works with your patients on a regular basis, share your My Patients list to give him quicker access to the patients you're following. For example, you might share your list with a student, resident, or social worker. Shared lists appear in the other users' Shared Patient Lists folder.

1. Select the **My Patients** list and click 🔧 **Edit List** > **Properties > Advanced** tab.
2. In the **User** field, enter the name of the users you want to share your list with.
3. In the **Access Level** field, choose what the users can do with your list:

   □ **View Only**: View the contents of the list.
   □ **Add/Remove Patients**: View the list and add or remove individual patients.
   □ **Modify Properties**: View the list, add or remove patients, and change the columns that appear.

- □ **Change Accessibility**: View the list, add or remove patients, change columns, and change the levels of access granted to other users.
- □ **Delete Patient List**: View the list, add or remove patients, change columns, change access levels, and delete the list altogether.

4. Click **Accept**.

Update your report toolbar

You can modify your report toolbar by adding or removing buttons, or by changing the order of the buttons or giving them new names. The report toolbar appears in many activities, such as Patient Lists and Summary, and looks something like this:

1. Click 🔧 and select the reports that you want to appear as toolbar buttons.

   - □ Click **Add Current** to quickly add the report you are viewing.

2. Enter short display names (button names) so more buttons can fit on the toolbar.
3. Click the arrows (▼ and ▲) to change the button order. The first report will appear as a button on the left side of the toolbar.
4. Click **Accept**. The report buttons appear on the toolbar.

Choose which info appears in My Cases (for surgeons)

Update your settings for the My Cases status boards to quickly access the cases you need to see.

1. Go to ▤ **My Cases** and select the view you want to edit (Today's Cases, Next 7 Days, etc.).
2. Click ⚙ **Settings** and edit the search parameters.

   - □ For example, change the **End date** to T+10 to show your cases for the next 10 days.

3. Click **Run**.

Post-Live User Settings

Update user settings to meet your needs

Watch POSS030: Personalize Your Space to see the benefits of updating this user setting.

Reorganize your main toolbar and Epic menu

1. Click the 🔧 icon in the upper-right corner of the main toolbar.
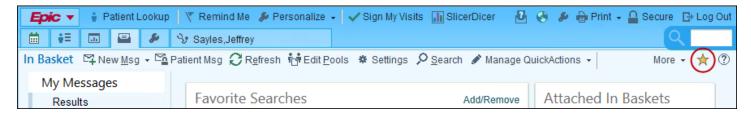
2. Organize your main toolbar:

   a. Drag and drop buttons to rearrange them.
   b. Drag buttons to the **Epic** menu if you don't need them on your toolbar.
   c. Drag buttons from the **Epic** menu to the main toolbar if you want one-click access. Click menus within the **Epic** menu to expand them.

3. Organize the **Epic** menu:

   a. Drag and drop items within the **Epic** menu, or its submenus, to rearrange them.
   b. Drag items to the **Rarely Used** menu if you don't need them and want to clear up some clutter.
   c. Drag items to the top of the **Epic** menu to pin them there for quick access in the future.

Set your own home workspace

Several activities open when you log in, such as the schedule, Patient Lists, My Dashboards, and In Basket, but only one can be the default. If the default doesn't meet your needs, even just for the day, change it to save yourself a click each time you log in. Select the tab you want to be your home workspace and click ☆ at the top right.

Reorganize your activity tabs

You can reorganize your activity tabs to be exactly how you want them in each type of workspace. For example, when you're in a patient's chart, when you're in a patient's office visit, and when you're in a telephone encounter.

1. Open a patient's chart or encounter.
2. Drag and drop the activity tabs to reorder them, or drag less frequently used activities to the ▼ icon to add them to the **More** menu.

3. Make a tab stand out more by right-clicking it and selecting **Mark as Important**. Tabs that are important are bold and have an icon.
4. Change how all of your activity tabs appear by clicking 🔧 next to the More menu and selecting one of the options for the Display mode for all tabs:

   - Default: Some tab names might be truncated so that the maximum number of tabs can appear
   - Full Text: Full tab names appear
   - Icon Only: Only the icons for each tab appear

> ⓘ Access activity tab settings while you're in a chart by right-clicking a tab. You can change the importance of a tab and move tabs to the More menu.

Adjust your themes and decorations

Click the **Epic** button and select **My Settings** > **Themes** to select a new color scheme. To mix things up even more, click the **Epic** button and select **My Settings > Decorations**. Choose a decoration you like, or select the **None** option if you prefer a minimalistic design.

Update your settings for other areas of the system

To rearrange the sections of a navigator, click ⊙ in the top right corner of the navigator and select

🔧 **Customize Your Navigator**. Then drag and drop the sections into your preferred order on the **Customize** tab of the sidebar and click ✔ **Accept**.

To rearrange the sections in a report, click the arrow next to the 🔧 icon in the upper-right corner of the report and select **Modify Report Layout**. Then drag and drop the sections into your preferred order and click ✔ **Accept**.

Throughout the system, you can click 🔧 to customize other features and click ☆ to mark something as a favorite. For example, click 🔧 in an activity toolbar to move infrequently used tools out of the main toolbar, or click ☆ to add commonly used activities as activity tabs.
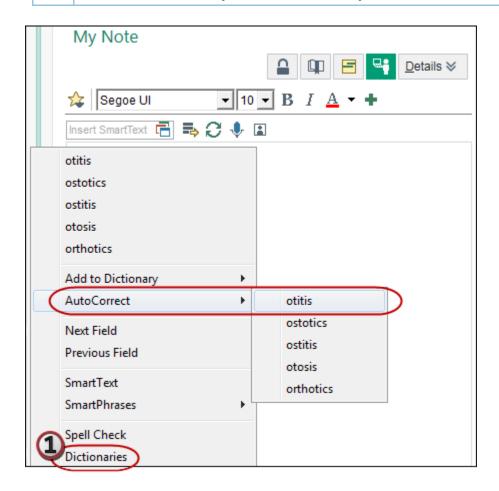
Type less and make fewer corrections with a custom dictionary

The User Dictionary automatically fixes misspelled words and turns abbreviations into full phrases. There's no need to type a period or "dot" first, like you do with SmartPhrases. You can set it up to know your shorthand and frequently misspelled words, so you type less.

1. Use Chart Search to open User Dictionaries or simply right-click in your note and select **Dictionaries**.
2. Go to the **Auto Correct** tab.
3. In the **Word to add/update** field, enter an abbreviation or misspelled word you want the system to update.
4. In the **Replace word with** field, enter the full word, full phrase, or correct spelling you want the system to pull in.
5. Click **Add/Update Word**.
6. Click **Accept**. Now, when you type the abbreviation or misspelled word and press the **Spacebar**, the full word or correct spelling is pulled in.

> ℹ️ Add entries on the fly by right-clicking a misspelled word, selecting **AutoCorrect**, and then selecting the correct spelling. The word is corrected in your text, and is also added to the **Auto Correct** tab in your User Dictionary.

Filter information in Chart Review
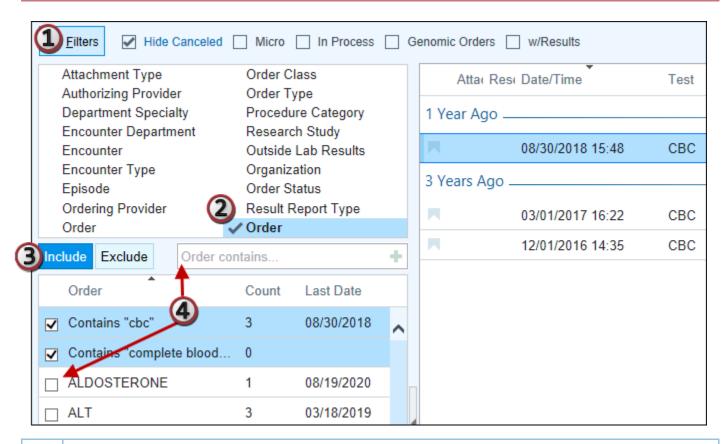
> 🎬 Watch POSS018: Chart Review Filters to see the benefits of updating this user setting.

To find specific information in Chart Review more quickly, you can filter the data that appears on a tab. For example, you can choose to see only encounters in a certain specialty. Or, you can exclude phone calls and other encounter types to quickly create a narrative of when the patient was actually seen in the office.

1. While you're reviewing data on a Chart Review tab, such as **Labs**, click 🔽 **Filters**.
2. Select the type of data on which you want to filter, such as **Order.**
3. By default, your filter will be set to include the items you want to see. If needed, click **Exclude** if you want to filter out specific items. For example, you might want to create a filter to quickly find all of a patients visits with providers other than you.
4. Select the items you want to see from the list or enter keywords in the free-text search field to catch potential variations.

   ▫ For example, you could type "cbc, complete blood count", and then press **Enter** to make sure your filter catches labs that use both the acronym and the full name of the lab. Or, if you want to see all encounters with a diabetes diagnosis, use a keyword to catch more specific diagnoses.

!	The filter options you see are based on the information in the patient's chart, so they vary by patient.

(i)	Examples of helpful filters: • On the **Encounters** tab, filter by diagnoses, encounter type, and department specialty • On the **Labs** tab, filter by specific orders • On the **Media** tab, filter by document type

Create Quick Filters

If you frequently filter on certain information, save your settings as Quick Filters. These filters only appear for you, but are available for all of your patients. Other clinicians can't see your Quick Filters.

1. In Chart Review, apply one or more filter criteria.
2. To save your current combination of criteria as a Quick Filter, click 🖫 **Save as New Filter**.
3. Enter a name for your Quick Filter and click **Accept**. The filter appears as a check box at the top of this Chart Review tab.

(i)	To rearrange or delete filters later, click 🔧 at the top right of Chart Review and select **Manage Quick Filters**. From here, you can also choose whether certain Quick Filters are automatically applied in Chart Review.

(i)	If you forget the combination of criteria a Quick Filter uses, hover over it to check its logic.

Rearrange Chart Review tabs to match your preferences

Watch POSS055: Chart Review Personalization to see the benefits of updating this user setting.

Click 🔧 at the top right of Chart Review and select **Manage Tabs**.

A. Rearrange the tabs to match your preferred order using the list on the left.

B. Change which tab opens by default when you go to Chart Review by selecting it in the list on the left, then clicking the ☆ on the right.

C. Change the color of certain tabs so they stand out.

If you want to customize a single tab on the fly, just right-click the tab at the top of Chart Review.

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. In the **Display** section, customize your view of the Results Review activity.

   - **Font Size**. Adjust the font size to what's comfortable for you
   - **New Results Highlighting**: Enable this to highlight new results since your last Time Mark.
   - **Row Labels and Filters**: Determine if you want labels and filters to appear on the left or right of the screen.
   - **Newest Data**: Determine if results are chronologically listed with the newest data on the left or the right

3. In the **Time** section, determine what default time filter you want to use.

   - Starting the next time you open Results Review in any patient chart, the results will be filtered based on this setting. Click the **Change current time filter** link to change the filter for the results you're viewing right now.

Update your view of the problem list

Watch POSS031: Problem List Customization to see the benefits of updating this user setting.

Click 🔧 at the top right of the section.

A. To change how the problems are grouped, select a different **List View**. For example, you can choose to group problems by their priority or by body system. Many specialties have a view that groups the most relevant problems at the top of the list.

B. To change what options are available for each problem, click ⌄ **Choose Columns**. For example, add the **Sort Priority** column to have a one-click option to change a problem's priority. Click 🔧 again to save your changes, which appear only in your view of the problem list.

Update your settings for the Medication Management section to speed up med list review

Save time in the clinic by changing your view of the **Medication Management** section and adding one-click access to common actions. To access these settings, click 🔧 at the top right of the **Medication Management** section.

A. By default, the **Medication Management** section separates items into two groups: medications and procedures. If you prefer, select a different **List view** option to group items by associated diagnosis, pharmaceutical class, pharmaceutical subclass, or therapeutic class.

B. To add or remove columns and buttons from your view, click 🔧 **Choose Columns,** and then select or clear check boxes as needed. When you've finished, click ✔**Accept**. If you don't already have them, consider adding the following columns:

- **Change/Modify Button**
- **Reorder Button**
- **Discontinue Button**
- **Dose, Route, Frequency**

Set your most common diagnoses as speed buttons
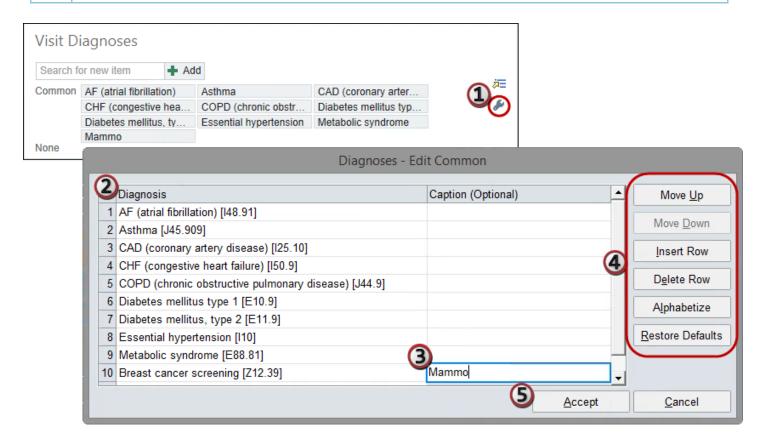
Watch POSS057: Visit Diagnoses to see the benefits of updating this user setting.

Create diagnosis speed buttons so you can add your most common diagnoses in one click rather than searching for matching diagnoses. If you prefer, you can move the buttons to a drop-down list. For example, in primary care, you might want to ensure your screening diagnoses and well-visit diagnoses are on this list, since they are commonly used.

1. In the **Visit Diagnoses** section, click 🔧.
2. Enter or remove diagnoses as appropriate.
3. Enter a name in the corresponding **Caption** field if you want a different name to appear on your speed button.

   □   For example, instead of "Breast Cancer Screening," you can name the button "Mammo."

4. Change the order according to your preference, or alphabetize the buttons.
5. Click **Accept**. Your speed buttons are updated, and appear as options on all of your patients.

> ℹ️ To see the visit diagnosis options in a menu instead of as buttons, click ⧉. The menu appears to the right of the **Add** field. This option might be helpful if you have a lot of diagnoses on your preference list and you don't want that many buttons to appear.

Set your levels of service as speed buttons
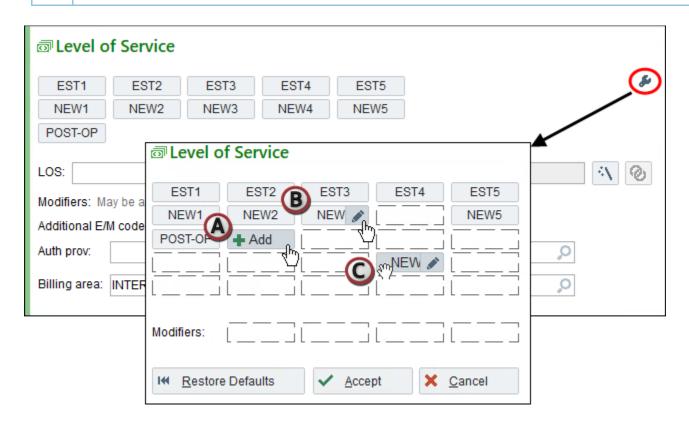
> 🎬 Watch POSS004: Wrap-Up Tips to see the benefits of updating this user setting.

Edit the **Level of Service** navigator section to speed up documentation at the end of a visit. You can add up to 25 LOS buttons, edit button names, and choose how the buttons are ordered and grouped.

1. In the **Level of Service** window, click the 🔧 at the top right.
2. Edit your LOS buttons:

   a. To add a new button, click in an empty rectangle. Add a caption and code in the window that opens.
   b. To change an existing button, hover over it and click the ✏ icon that appears.
   c. To rearrange buttons, drag and drop buttons to where you want them to appear.
   d. Add buttons for any commonly used modifiers at the bottom of the section.

3. When you have completed your updates, click ✔ **Accept**.

> ℹ Click ◄◄ **Restore Defaults** to undo your changes and return to the default setup.

Save your most commonly used pharmacies as favorites

If there are pharmacies you select frequently, like the one in the building or down the road, save them as favorites, so they appear on the Suggested tab for all patients. Click 🔧 at the top right of the Pharmacy Search window, add them to the list, and click ✔ **Accept**.
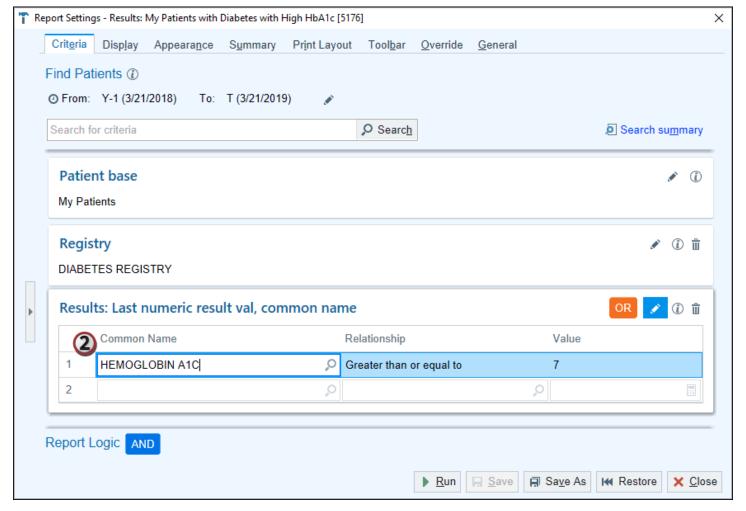
Modify a report to meet your needs

Before you run a report from your dashboard or from the Catalog, you can modify its existing search criteria, add new criteria, change its search time frame, and add or remove columns from its results display. You can then save your changes for future use and make your modified reports available to others.

Modify a report's search criteria

1. To edit a report, you need to open the Report Settings window:

a. Hover over a metric on your dashboard, then hover over ⓘ, and then hover over the report link. Then click ✏.
b. In the Library, hover over a report's name and click ✏ **Edit**.

2. On the **Criteria** tab, click ✏ next to a criterion to change the search value for that criterion. For example, modify a report on diabetic patients with high HbA1c levels to search for different relevant lab results.
3. Click **Save As** if you want to save your changes in a new version of the report. Give your report a name and click **Accept**. Then click **Run**.
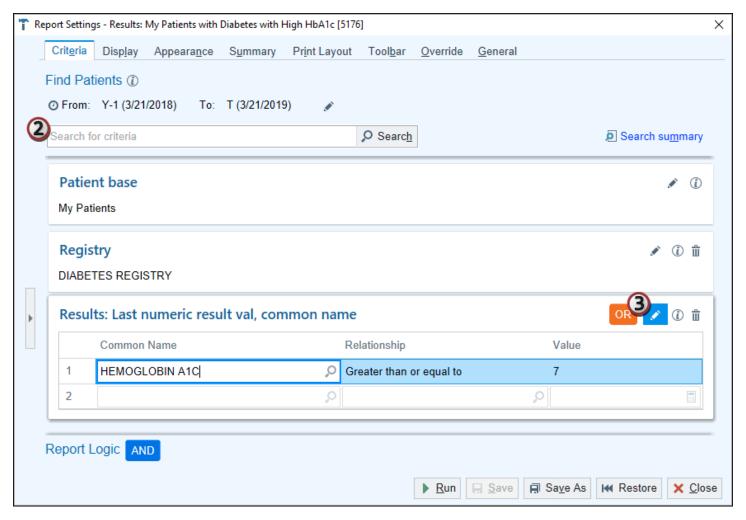
ⓘ If you want to run the report on someone else's patients, click **Choose Criteria** and modify the Run As User criterion.

Add criteria to a report's search

1. From the Library, hover over the report you want to use, such as one created from the Find Patients - Generic Criteria template, and click ✏ **Edit**.
2. On the **Criteria** tab, search for and select a criterion to include in the report, such as **Age in Years**. Criteria that are included in the report are listed.
3. Click ✏ to the right of a criterion to enter what values the report should find. For example, for the Age in Years criterion, enter "Greater than" in the **Relationship** field and "13" in the **Age** field to find patients older than 13. The options that are available depend on the criterion you selected.
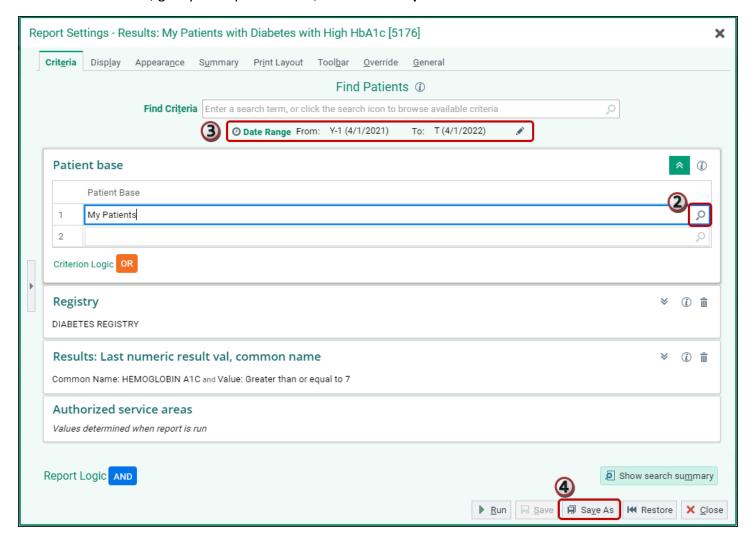
4. Click **Save As** and enter a new name if you want to create a new version of the report, and then click **Run**. The report runs and the results include records based on the new criteria.

Search a different subset of patients

1. From the Catalog, hover over the report you want to use, such as the My Patients with <X> Problem List Diagnosis report, and click ✎ **Edit**.
2. Click 🔍 in the **Patient Base** field. Select one of following choices by double-clicking:

    a. Select **My Care Team Patients in Time Frame** to search for patients who had you on their care team within the time frame specified in the Report Settings window.

    b. Select **My Current Care Team Patients** to search for patients who have you on their care team now.

    c. Select **My Patients** to search for patients:

    - Who have you on their care team.
    - Whom you've seen or are scheduled to see during the time frame specified in the Report Settings window.
    - For whom you've been a supervising provider, if you work with residents.

    d. Select **My Scheduled Patients** to search for patients whom you've seen or are scheduled to see during the time frame specified in the Report Settings window.

3. Change the date range if necessary.

4. Click **Save As**, give your report a name, and click **Accept**. Then click **Run**.

Search a different range of dates

In some reports, you can set a date range to control the time frame the report searches. Setting a date range helps limit the number of results.

The date range applies only to criteria that change over time (these criteria are identified by the 🕐 icon). For example, if you're searching for your male patients between January 1 and March 1, the date range is ignored because a patient's sex rarely changes. All of your patients appear in the results. If you add the criterion BMI > 30, the report uses the date range because BMI can change over time. The search results include only male patients that had a BMI greater than 30 between January 1 and March 1.

1. From the Catalog, hover over a report and click ✎ in the upper right.
2. Click the pencil to specify the date range and, in certain reports, the time range.

   a. Enter a relative date using one of the following shortcuts: w=week, m=month, mb=beginning of the month, me=end of the month, or y=year. You can also use an absolute date.
   b. For example, enter "mb-3" to search for patients whose BMI was greater than 30 in the past three full months.

3. Click **Save As** if you want to save a new version of the report, and then click **Run**.

Add a column to a report's results

To see other information about the patients in a report's results, you can add columns to the results.

1. In the Catalog, hover over a report and click ✎ in the upper right.
2. Select the **Display** tab.

   - All of the columns available for the report appear in the **Available Columns** list.
   - All of the columns that currently appear in the report are in the **Selected Columns** list.

3. Select a column from the **Available Columns** list, and click the right arrow to move it to the **Selected Columns** list.
4. Click **Save As** if you want to create a new version of the report, and then run the report.

Remove a column from a report's results

If a report's results are too crowded, you can remove columns that show information you don't need.

1. From the Catalog, hover over a report and click ✎ in the upper right.
2. Select the **Display** tab. All of the columns that currently appear in the report are in the **Selected Columns** list.
3. Select a column from the **Selected Columns** list, and click the left arrow.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**.

> ⓘ Choose which information appears in the bottom pane when you run reports by modifying what appears in the **Detailed View** section at the bottom of the **Display** tab. Modify the name of the view you select in the **Display Name** section.

Organize the dashboard

Organize your report lists in the Link component

1. Hover over the Link component and click ⋮ then 🔧 **Component Display**.
2. Drag a report to where you want it to appear in the list, and then accept.

Add components to the dashboard

1. Click the dashboard name, and then click **Show Catalog**.
2. Enter a search term.
3. Hover over a component and click the plus sign to add it to your dashboard.

Organize components on the dashboard

1. Click ⋮ and select 🔧 **Edit Layout**.
2. Drag a component to where you want it to appear.
3. To resize a component, drag its bottom or side edge.
4. When finished making changes, click ✔ **Accept**.

Update your dashboard settings

1. On your dashboard, click ⋮ , choose ⚙ **Dashboard Settings**, and enter a new Display title on the **Layout** tab.
2. Click 🔧 next to a component to change its name, color, and display settings.
3. Accept when you're finished editing a component and save your changes.

Update your patient list columns

You can add, rearrange, or remove columns in lists you create to make it easier to find the information you use most often. Select a list you've created and click 🔧 **Edit List > Properties**.

- To add a new column to your list, select the column from the list of **Available Columns** and click ➕ **Add Column**.

> ℹ To save time scrolling through a long list of available columns, use the **Search** field to look up columns by keyword, such as Due.
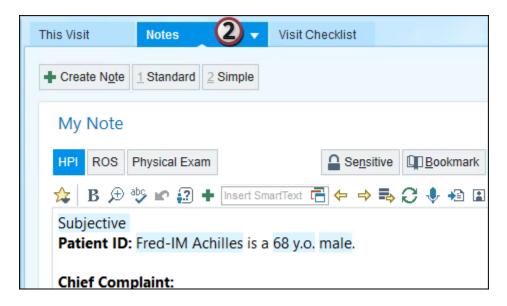
> ℹ To copy an existing set of columns from a template, click **Copy**.

- To remove a column you no longer want to appear in your list, select the column from the list of **Selected Columns** and click ➖ **Remove**. Note that some list templates have required columns, which you can't remove.
- To rearrange the order of the columns in your list, select a column in the Selected Columns list and use the arrow buttons to move it up or down.
- To change the default column used to sort the list, enter a column to sort by.

  - If you don't enter a column to sort by, the patient list is sorted on the first sortable column in the list.

  - To change the default sort direction, click ≣↑ to sort in ascending order or ≣↓ to sort in descending order.

- Click **Accept** to save your changes.

Write your note in the sidebar

If it's not already there, keep your note accessible in the sidebar while you do other things in the chart, like write notes or update the problem list. Having your note in the sidebar is also useful when you need to refer to other information, like lab results, while writing your note.

1. Click ⧉ in the upper-right corner of the Notes activity and select ➡ **Move to Sidebar**. Now, if you switch to another activity, like Chart Review, your note remains open.

   - If you are using NoteWriter to compose your note, the text of the note in the sidebar changes as you make selections in NoteWriter.
   - If you switch to a different activity, you can return to the NoteWriter by clicking the buttons at the top of your note, such as **HPI** or **ROS**.

2. To return the Notes activity to the list of activity tabs on the left, click ▼ on the **Notes** tab in the sidebar and select ⬕ **Move to Left Pane**.

Edit notes in a floating window

If you have two monitors, you might find it helpful to edit your note in one screen while you browse the chart on another screen.

In the Edit Note tab of the sidebar, click 🔽 and select **Move to Floating Window**.

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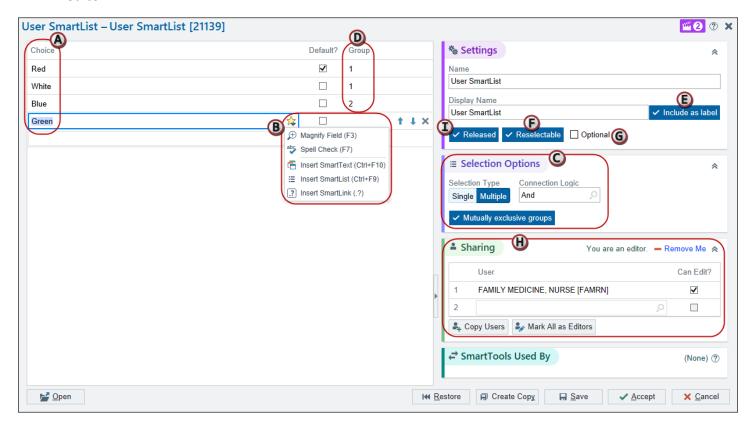
1. In the **Choice** table, enter the choices in the SmartList (A). Select the checkbox next to an option to mark it as the default option.
2. To add another SmartTool (SmartText, SmartList, or SmartLink) to a choice in the SmartList, click the ⭐ and select one of the options (B):

    ▫ 🖾 **Insert SmartText**
    ▫ ☰ **Insert SmartList**

□ 　[?] **Insert SmartLink**

> (i) 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** checkbox.
   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"), select the **Include as label** checkbox (E) and enter the display text in the **Display Name** 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** checkbox (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.

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