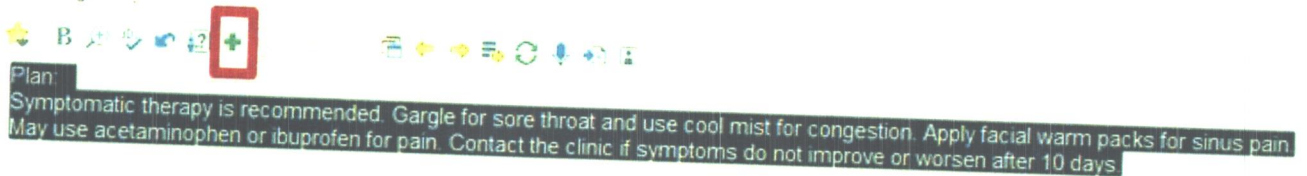# SmartPhrases- Creating, Editing, Sharing (12/28/21)
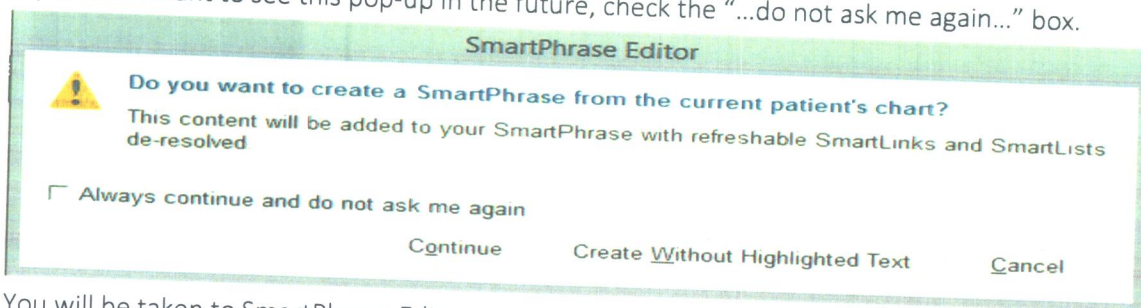
Save a SmartPhrase "On the Fly"

1. In the Smart-enabled text field, highlight the phrase you wish to save.

Plan:
Symptomatic therapy is recommended. Gargle for sore throat and use cool mist for congestion. Apply facial warm packs for sinus pain. May use acetaminophen or ibuprofen for pain. Contact the clinic if symptoms do not improve or worsen after 10 days

2. Click the green plus symbol ╋ in the toolbar and click "Continue" on the pop-up screen.
If you don't want to see this pop-up in the future, check the "...do not ask me again..." box.

SmartPhrase Editor

⚠️ **Do you want to create a SmartPhrase from the current patient's chart?**
This content will be added to your SmartPhrase with refreshable SmartLinks and SmartLists de-resolved

☐ Always continue and do not ask me again

C̲ontinue   Create W̲ithout Highlighted Text   C̲ancel

3. You will be taken to SmartPhrase Editor.
   a. You may make any necessary edits to your SmartPhrase at this time.
   b. **Do Not include patient specific data or PHI in a SmartPhrase.**
   c. Give your Smart Phrase a *name*. You will type a period followed by this name to invoke your SmartPhrase.
   d. Give your SmartPhrase a *brief description* to make it easy for you to remember what it is.

⚙️ **Settings**   ⌃

Name

INSYMPTOMS

Description   Populate from Text

Instructions for symptomatic therapy.

    e.   If you wish to share your SmartPhrase, indicate the name(s) of any people you wish to share your SmartPhrase with in the Sharing Section.

         i.   Checking "Can Edit" means the other person will be able to edit the SmartPhrase content you created. It will change your saved copy of the SmartPhrase as well as theirs and any other users.

         ii.   If you do not give the other person permission to edit, they will use the SmartPhrase as you created it.

    f.   Click "Accept" to save your work.

User SmartPhrase – AMSMESSAGE [271062]

ⓘ Do not include PHI or patient-specific data in SmartPhrases.

⭐ B ⁺²? ✚   ➜ ≡

Message left on patient's voicemail to call Anticoagulation Management Service back to discuss INR results. Educated patient via voicemail to continue on his current dosage of the Warfarin today if we do not speak before 1600. Will await patient's call back.

⚙ Settings

Name ❗

Description   Populate from Text

Text Format
Rich Text Plain Text

SmartLink Text Size and Font ?
Match Template Formatting **Keep SmartLink Formatting**

📖 Synonyms

👤 Sharing   You are an editor ━ Remove Me

User	Can Edit?
1	☐
2	☐
3	☐
4	☐
5	☐
6	✔
7	✔

👥 Copy Users   👥 Mark All as Editors

📂 Open   📋 Create Copy   💾 Save   ✓ Accept   ✗ Cancel

---

4.   If you forgot what you called your SmartPhrase, you can find it under this icon in the toolbar: 📇?

📝 Build a SmartPhrase In MySmartPhrases

1.   EPIC➜ Tools ➜ Smart Tool Editors ➜ MySmart Phrases

                       ✚ New Phrase

2.   Click "New Phrase"

3.   Create your SmartPhrase by free typing, adding Smart Lists (dropdown lists), SmartText or SmartLinks.

4.   Give your SmartPhrase a name.

5.   Give your SmartPhrase a brief description (i.e., New Patient Note or Patient Instructions for Wound Care).

6.   Add names of the people you wish to share the Smart Phrase with if applicable.

7.   Click "Accept" to save your SmartPhrase.

Edit a SmartPhrase From MySmartPhrases

1. EPIC→ Tools → Smart Tool Editors → MySmart Phrases
2. Locate the SmartPhrase on the list that you wish to edit.
3. Double Click on the SmartPhrase name.
4. Make any necessary changes.
5. Click "Accept" to save your work.

Pull Another User's SmartPhrase to Your MySmartPhrases

1. EPIC → Tools → SmartTool Editors →Smart Phrase Manager
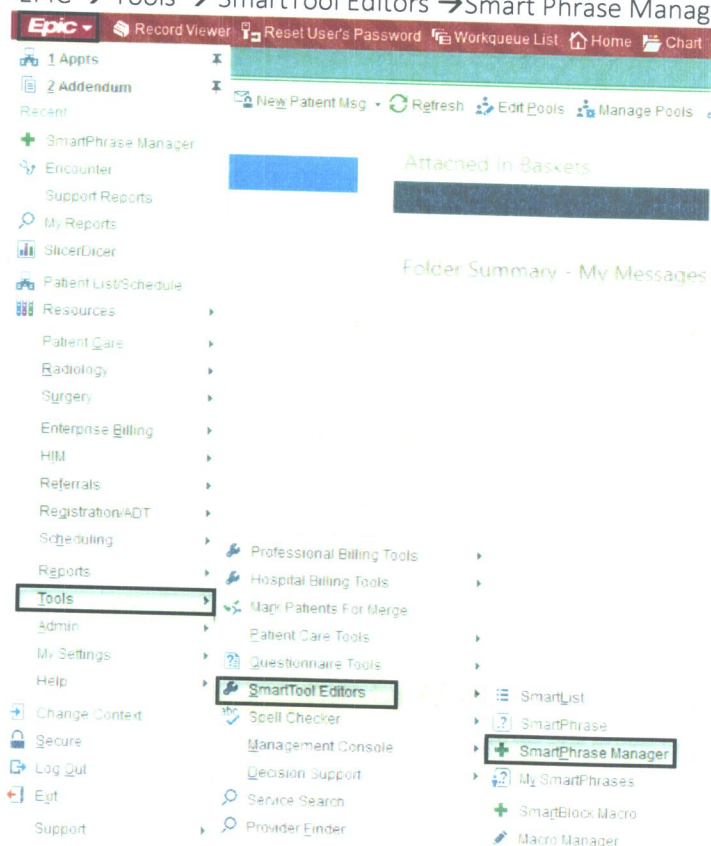
2. Click SmartPhrase Manager.
3. Change out your name for the person whose SmartPhrases you wish to copy.

4. Highlight the SmartPhrase you wish to copy and double click to open the smartphrase.

3

5. Select "Add Me" within the "Sharing" section.

6. By selecting "Create Copy" the user can create their own version of the smartphrase and make edits.

   FYI- If you have EPIC running on other computers, you will need to log out and back into EPIC on the computer(s) to pull across the SmartPhrase that was created, shared or edited.

More "Smart" Terminology
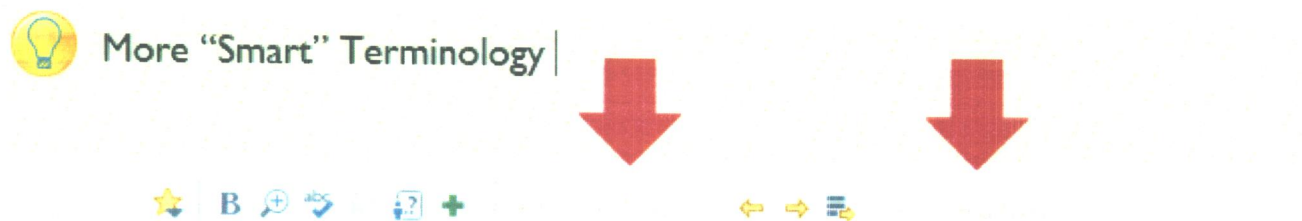
1. **SmartText-** Longer blocks of text or notes found under the Smart Text search field.
2. **SmartList-** Also known as a "dropdown list". Search using the SmartList search field in the toolbar.

   A SmartList has brackets around it and contains the list name and identifier number. {WOUND CARE PULSES:11072}

3. **SmartLink-** links and pulls discrete data from other parts of OneChart.

   A SmartLink contains a word with @ symbols before and after the word.

   Example: @NAME@ is a @AGE@ old @SEX@ This is a SmartLink that will pull in the patient's name, age and sex.

4