Documenting with SmartTools

Purpose:

SmartTools are tools that allow users to complete routine encounters with pre-populated information.

Definition:

SmartTools are shortcuts to assist in documenting patient care. There are five smart tools:

1. **SmartLinks** – Links information from the patient's chart.
2. **SmartLists** – Lists that provide a preconfigured set of choices.
3. **SmartText** – Text templates created for an entity that may include SmartLinks, SmartLists and SmartPhrases.
4. **SmartPhrases** – User created phrases typed with a few characters that may represent a block of text, SmartLinks, SmartLists, etc.
5. **SmartSets** are a combination of various SmartTools. Many common activities can be done in one step. Users can place orders, assign diagnoses, complete progress notes and more.

Objectives

Upon completing this lesson the participant(s) will be able to:

- Utilize a SmartPhrase in Letters, Comments or Documentation
- Open a SmartSet preview
- Create and Edit a SmartPhrase from the SmartPhrase Manager
- Add SmartLinks, SmartLists and SmartPhrases to a SmartPhrase

Notes Section: Use this section to note practice or unit specific questions

Exercise: Charting with SmartTools

1. Select the patient used previously and select the progress notes section. The documentation section here is standard for any area throughout the chart where "free text" can be entered.
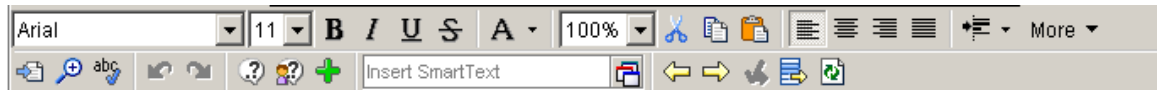
2. In the ☐ Insert SmartText ☐ box, type "**GEN**" and scroll through the list to find "**Gen General Medical Exam**." If you want to preview the note prior to using it click ☐ Show Preview ☐. This will display the note and allow you to change. If you like the note, click ☐ Accept ☐ , double click the note or press the "Enter" key.
   a. NOTE: If you think you will use this particular note in the future, you can ☐ Add Favorite ☐ to allow facilitate searching. Next time you are charting, you can select from your favorites by clicking favorites from the top tool bar.
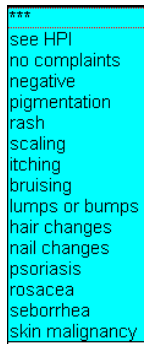
   ⊘ Encounter Matches | Fa̲vorites

3. SmartLinks are "pulled in" automatically from the chart and are built into SmartTools. SmartLinks would be displayed in your note as a light blue color. These vary by practice and are usually imbedded into your practice based notes.

4. To begin moving through the note, move your cursor to the top of the writing pane and press the F2 button on your keyboard. The F2 button allows you to move to the next field and can ensure you do not miss any part of the note. Notes cannot be finalized if there is missing data, so using the F2 button alleviates some frustration.

   NOTE: When F2 is selected, there may be a yellow or blue list that displays. (See Figure 3) The yellow list allows for only one selection to be made from the list. The blue lists are lists where multiple selections can be made. To make selection(s) from SmartLists, left click the selection(s), then when the selection(s) is/are made right click on the mouse to move to the next field. "Left click to pick, right click to stick" 1

5. Any time three (3) *** are display, that is any area of the chart that can have text freely typed in. If you do not want to chart in that area, you MUST delete the *** or the note CANNOT be saved.

6. For the first section of this note, the Chief Complaint has ***. This can be free texted in, or you can use a SmartText of .Chief complaint to pull in the Chief Complaint that was entered prior. (If there was not a Chief Complaint listed, a SmartLink indicating "No chief complaint on file" will display). Press F2 to move to the next required field.

    a. If you still see the *** near this, you must delete them, otherwise the note will not be able to be saved.
    b. If at any time you make a mistake, or want to make a correction, click the ⬅ on the toolbar and this will "undo" your last selection.
    c. As soon as the . is press and a letter is type, a list of SmartText starting with that letter will display, example .A will display all of the SmartText starting with the letter A. If you type more letters after the first letter, the SmartText will become more limited and perhaps more precise to what you are looking for.

7. For the History of Present Illness, free text an HPI. Remember the *** must be removed after this is done. Press F2 to move to the next required field.

8. You will be moved to the Review of Systems. Here you will see {}. Anywhere you see a word with : after it then {} (Example Skin: {Skin:100}) this indicates a SmartList. SmartLists have two distinct colors, blue and yellow. Blue are lists that can have multiple selections. Yellow are lists that you can only select one choice.

    a. On the blue colored lists, make you selection(s) with the left click button on your mouse, then right click on your mouse when you are done with the list, this will "Stick" you selection. (An example of a SmartList is below-(Figure 3)

```
***
see HPI
no complaints
negative
pigmentation
rash
scaling
itching
bruising
lumps or bumps
hair changes
nail changes
psoriasis
rosacea
seborrhea
skin malignancy
```
Figure 3

b. On the ROS, pick a few to chart on, being aware if the *** where free text can be entered to be more specific with your documentation.

9. Press F2 to move to the next section.

10. To enter a SmartPhrase, do the following:

a. Move to the bottom of your note and Click the [icon] Icon, this will display the system SmartPhrases available to you.
b. There are several thousand SmartPhrases available to you.
c. To see a sample of some or how they work, enter the following SmartPhrases
   1. .ME , then press the <Spacebar>. This will display your name.
       > NOTE: If you press the <Enter> key it will add the SmartPhrase then move to the next line. By pressing the <Spacebar>
   2. .NOW will display the current time
   3. .TD will display the current date
   4. .DIET will display a short sentence about some counseling you may have done during this visit.
d. If there are SmartPhrases you may like to use without having to search for it, click the gray [icon] to the left of the particular SmartPhrase. This will make it a favorite. If you enter a SmartPhrase that you did not want to enter, to undo that selection click the yellow [icon] on the toolbar to undo the selection.
NOTE: The Epic Team has Practice Liaison staff that can customize and add additional SmartPhrases for you. Also on the Epic Section of the Intranet there are tutorials available for you if you want to add your own. **http://uphsxnet.uphs.upenn.edu/is/epic/**