**Epic Inpatient Provider Personalization**

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**Patient Lists**

Setting Up Patient Lists

**Add and Designate a folder**

* To add a separate folder for other lists like Consults or your physician group, Click **Edit List dropdown** then **Create My List**.
* Give your list a name.
* Click the **Copy** button and choose **ASP Provider My List Template** and **Accept.** Note:If you want to add other columns to this list, use the instructions above for configuring columns.
* Back on the Patient Lists page, use the Available Lists section to pull the appropriate system list to your new My List. i.e. ICU patients, specialty consult list, and/or your physician group.
* You can also **drag/drop** or **right-click and ‘Send to’** any of the available lists in the bottom section to your My Lists folders.
  + You will see all the patients in that unit, not just yours**. A screenshot of a computer

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* If this is the list you want to appear whenever you log in, right-click on the folder and select **Default List**. The default list appears with an asterisk (\*).

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* You can create any number of folders with Available Lists from the bottom section.

**Configure columns**

* In the Patient List screen, you can customize lists to make them more efficient for your workflow.
* Configure the columns in your My List and the order in which they appear.
* Select the My List folder you want to edit and click **Edit List** > **Properties**.
  + In the top list, Available columns, Search for **Prof charge** as an example.
  + Choose the option that best describes what you want to add, highlight and click **Add Column**.

This adds the column to the bottom of the lower section where you can scroll to find it, highlight it, and use the up/down arrow to move it in the list. (optional)

* Click **Accept**. The new column appears with the other columns. If you don’t like the way it looks, click Edit List and Properties again.

Working from Patient Lists

* Hover over an icon in Patient Lists for an explanation of the notification icon.
* Double-click the icon to go directly to that part of a patient's chart and act on the notification.

Patient List Reports

* Wrench in reports and rearrange the order.
  + i.e Physician Checklist
* Click on the magnifying glass in the reports section, search and choose **Physician checklist** from the list.
* Click the wrench and choose **Add or Remove Buttons from Toolbar.**
* Find the first empty field in the pop-up box, then click **Add Current**.
* Use the up and down arrow to move your selection to order the buttons.

Your report will now be on the toolbar as a button to select.

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**Documentation**

Notes – Creating SmartPhrases

There are many of these phrases that already exist in the system. You can see then by using the SmartButler and then clicking the System SmartPhrases checkbox.

**To begin while in a note:**

1. In the **Notes Activity or any navigator Notes section**, open a note.
2. Click on the **green plus sign** in the note toolbar.
3. Follow the steps below to create your SmartPhrase.
   * You can also type your phrase/s in the actual note, highlight it, then click the green plus sign.

**To begin without opening a patient’s chart:**

1. The Personalize button may already be displaying depending on how many buttons are on the toolbar. If not, click the double arrows to select Personalize > choose **My SmartPhrases**.
2. A window opens to begin adding SmartPhrases at the **User** level. Make sure this button is blue.
3. Type your note or phrase in the large section on the left. If you want to look up existing SmartText or SmartLists, there is a field for both.
4. In the right panel, type a name for your SmartPhrase using your initials at the beginning.
5. Enter a description to remind you of the phrase text.
6. At the bottom, if you are going to share this with other physicians, search for their names in the empty spaces and add them.

**To steal others’ SmartPhrases:**

1. Open My SmartPhrases from the Personalize button.
2. In the **User search** field, search for the physician you wish to steal from.
3. All their SmartPhrases will show up; click on the one you want and click **Add to My SmartPhrases**.
4. All SmartPhrases can be found using the SmartPhrase butler in the note toolbar. 

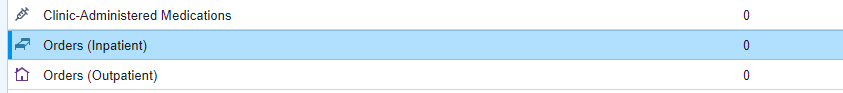
Favorite Orders

1. The Personalize button may already be displaying depending on how many buttons are on the toolbar. If not, click the double arrows at the end of the toolbar to select **Personalize > Preference List Composer.**

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1. Choose **Orders (Inpatient)** from the Preference List Selector window.



1. **Click New Section** and type a title i.e. Labs, Orders, Imaging, etc.
   * If you want to create diagnosis sections, you can do that also. Total Knee, Pneumonia, etc.
2. Type ‘Labs’ in the **Display name field and Accept**.
3. Click **New Item** in the toolbar.
4. As an example, Search for ‘cbc’. Find the one you want to use from the list and **highlight and Accept**.
5. In the Preference List composer window, to create a STAT order, select a display name like **STAT CBC** so when it displays you know which one to choose.
6. Next, choose how you want the order to always default. Frequency, comments, etc.
   * If you are done with adding orders to this section choose **Accept**.
   * If you want to add more labs, choose **Accept & New Item**.
7. To continue with a new item or section, repeat the steps above starting with 3 or 5.

Save Favorite Orders on-the-Fly

**DO NOT OPEN ANY PATIENT CHARTS IN PRODUCTION UNTIL AFTER GO-LIVE**

1. Before the order is signed, hover over the order name to see the star on the right side of your screen.
2. Click the **star**.

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1. You may change the **Display name** to how you would like the order name to appear on your preference list.
2. Address the details of the order according to how you would like the order saved on your preference list.
3. Click **Accept**.

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1. A question will appear asking if you wish to Apply order details from this new order to current orders?

* **Yes** – the new order details you just entered will replace the current order.
* **No** – the details will stay the same on the current order.

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#### You Can Also...

Access your favorite order from your preference list with one click.

1. In the Orders Sidebar, click on the **New** icon.

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Create Multiple Versions of an Order Set

You can now have different Order Sets for variants of the same problem, saving you time when editing orders. For example, you could create specific Order Set versions for clinical situations such as MRSA or Pseudomonas. The base order set remains available.

#### Try It Out

**From outside a patient’s chart**:

1. Click the dropdown on the Epic toolbar for **Personalize** and choose **User SmartSets**. (this is an Ambulatory term for Order Sets)
2. Search for any Order Set and highlight it.
3. Click **New Version** at the bottom.
4. **Follow directions below beginning with Step 3**.
5. You can edit it anytime by opening the User SmartSets, finding it and clicking Edit Version at the bottom.

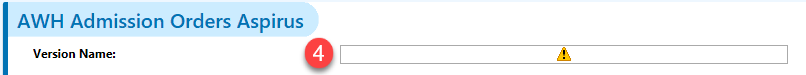
**From inside a patient’s chart:**

1. Click **Manage User Versions**.
2. Click **Create a Version Based on This Version**.

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1. In the **Version Name** field, enter a name for your custom Order Set. (optional)



1. **Select** the orders you want to include in this version of the Order Set.
2. Make changes to the order details by clicking the **blue text hyperlin**k.



1. Repeat steps 5 & 6 as you are working through the order set.
2. Click **Accept** when all customizations are completed.
3. Repeat the above steps to make an additional User Order Set.
   1. Once you have multiple versions created, they will display under your Favorites.

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Create Order Panels to Save to your Preference List (Browse)

You can save multiple orders that are difficult to find or that are placed together frequently to your preference list as an order panel.

**NOTE**: There are a few limitations on what clinicians can build: user order panels cannot contain a mix of inpatient, outpatient, and clinic-administered medication orders, and they cannot contain other panels.

Clinicians can remove orders from one of their user order panels but must create a new panel if they want to add orders if using the **On-the-Fly** method.

#### Try It Out

**From Inside a patient’s chart On-the-Fly**

1. You must add the orders first, then create the panel. Add some in the **Orders** activity, then click **Options**.
2. Graphical user interface, text, application, chat or text message, email

   Description automatically generatedChoose **Create Panel**.
3. Enter a **Display name**.
4. Edit order details by clicking the link below the order name.
5. Choose which orders are pre-selected.
6. Click **Accept**.

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#### Try it Out

**From outside a patient’s chart in Preference List Composer**

Orders can be added and removed from a panel using this method.

1. Click Personalize on the Epic toolbar.
2. Click **Preference List Composer**. Choose **Orders (Inpatient) > Edit**.
3. In the composer, choose **New Linked Panel** and decide if it is a Followed by, Or, And panel.
4. Type the name of the order, find it and Accept.
5. Open the **Details** and mark the appropriate dose, frequency, etc.
6. Click **Add Linked Order** at the top.
7. Type the order name again and repeat steps 4-6 until all orders are in the panel.
8. Click **Accept**.
9. Your orders will now be in your **Browse tab** along with all your Favorites when you click New in the Orders Activity.

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#### Further Customization

If you want to customize row information or buttons, anytime you see the wrench icon , there is an opportunity to customize that area. Patient Reports, tabs on the Epic Toolbar, Summary and Chart Review tabs, are a few of the places to do that. You can even change the color of your screen by using the Epic button and choosing My Settings; Themes and decorations.

#### Creating Macros (NoteWriter) vs. Using SmartText

See Videos on the Aspirus Intranet site under **EMR Info Center > Video Tutorials > Notes > NoteWriter Macros and NoteWriter Tips and Tricks.**

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