


SmartTools

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Types of SmartTools


SmartTools help you quickly document information. There are four types of SmartTools. Use each one to pull different information into your documentation:

SmartTool	Use to pull in
SmartTexts	Templates or blocks of text
SmartPhrases	Long words, phrases, or paragraphs
SmartLists	A predefined list of choices
SmartLinks	Information from another part of the chart

 You can use SmartTools in many places throughout Epic. If you see these buttons, the field is SmartTool-enabled: 

Use a SmartText

SmartTexts are standard templates or blocks of text typically used to document routine exams or problems that are common.

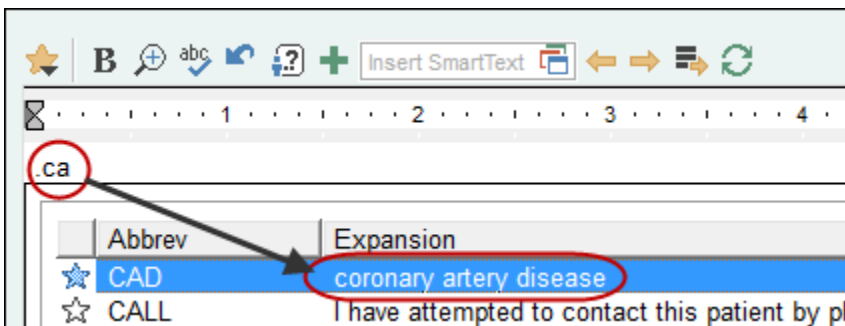
1. Enter a few letters of the SmartText's name in the **Insert SmartText**  field.
2. Press **Enter**. Select and open a SmartText.
3. Press **F2** to complete any SmartLists or wildcards (***)

 Click **Show Preview** to view the content of a SmartText before adding it to your documentation.

Use a SmartPhrase


SmartPhrases allow you to type a few characters that automatically expand to a longer phrase or paragraph. For example, typing ".ca" expands to "coronary artery disease."

1. In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name (for example, ".ca"). As you type, a list of matching SmartPhrases and SmartLinks appears.
2. Use the arrow keys to select the SmartPhrase you want to use in your note and press **Space** to insert it.
3. Complete any SmartLists or wildcards (***) in the SmartPhrase.







Create your own SmartPhrase

If you often type the same phrases and sentences while entering results, turn it into your own SmartPhrase and quickly pull the text into future notes, messages, or letters.

1. In a SmartTool-enabled field, enter the text you want to save as a SmartPhrase. Don't include any patient-specific information so you can use it for other patients.
2. Select the text and click . The SmartPhrase Editor opens with your text on the **Content** tab.
3. Enter a short, intuitive name for your SmartPhrase. This is the abbreviation you'll use to look up the phrase (for example, "cad" is the name for "coronary artery disease").
4. Make any necessary edits to the text.
5. Enter a summary of your SmartPhrase in the **Short Description** field. This description appears when you look up your phrase.
6. Accept your SmartPhrase.

See a list of all SmartPhrases

1. Click . The SmartLink/Phrase Butler opens and any SmartPhrases you've created appear.
 - The Abbrev column shows you what to type after the period (.) to use the phrase.
 - The Expansion column shows you the text that the phrase pulls in or, for longer phrases, includes a general description of the text.
 -  indicates a SmartPhrase you created.  indicates a system SmartPhrase.
2. To find phrases and control which ones appear, you can:
 - a. Use the **Filter** tab to select the SmartTools you want to see. For example, select the **System SmartPhrases** check box to see all available phrases.
 - b. Search for specific phrases.
 - c. Click  to mark phrases as favorites.
 - d. Use the **Sort** tab to control which items are listed first, such as your most-used items.
3. Double-click a SmartPhrase to insert it.


Select choices from a SmartList

SmartLists are lists of common choices that help you quickly customize your documentation. They appear in SmartTexts and SmartPhrases and look something like this: {pos_neg:315050}.

To complete a SmartList, select one or more of the choices.

1. Press **F2** to highlight the next SmartList or wildcard (***) in your note. Some values in a SmartList might be selected by default.
2. Click other values to select them.
 - A yellow background indicates that you can select only one value.
 - A blue background indicates that you can select one or more values.
3. If you accidentally select a value or want to remove a default, click it to clear it.
4. Right-click in the SmartList to move to the next SmartList or wildcard.

Undo a SmartList selection

To undo your last selection, click  or press **Ctrl+Z**.

To undo any SmartList selection, right-click the SmartList and choose **Reselect This SmartList's Selections**.



Use keyboard shortcuts to complete SmartLists. With a SmartList selected, press **Up Arrow** and **Down Arrow** to move through the list. Press **Spacebar** to select a choice. Press **Enter** to accept your choices and move to the next SmartList or wildcard (***) .

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