Ordering Tools

Order Sets:

Order Sets are preconfigured sets of orders and medications that are commonly ordered together. Order Sets can be configured to be suggested based on certain diagnoses, and users are able to save their own personally defaulted versions. Order Sets can be built to require specific orders and they can be configured to dynamically show a different group of orders (ex: labs, imaging, medications), depending on physical or patient location.

The most common patient scenarios that use Order Sets are admission, pre-op, post-op, and discharge.

Below is an example screenshot of what a sample Foundation System Admission Order Set looks like, with all of the individual groups closed by default (configurable setting).
Panels:
Panels are groups of orders and/or medications that are grouped together for quick ordering. For example, a medication that should be given, based upon specific result ranges, like warfarin. An order panel would be used over an order set, when the number of orders that is being placed is more limited and simple.

Panels can also be nested within each other. This functionality is called Nested Panels. Using this functionality, Panels are nested within other panels in a tree structure that matches the logic of the protocol. Below is an example for pain:
Quick Lists:

The Quick List functionality is used primarily by ED providers in our ASAP (Emergency Department) application, to allow for them to have a fast and easy way to enter a moderate amount of routine orders.

Quick Lists are not meant to be used as a replacement for Order Sets. It was designed as a quick and easy way to place initial diagnostic orders.

The most common medications and procedures are organized into groups and columns to facilitate efficient physician ordering. This functionality could also be useful for Respiratory Therapists, Cardiologists, or other non-ED users who place very similar orders frequently.

Medications, Procedures, and Panels can also be built into and ordered for a Quick List.
Preference Lists:
A Preference List is a collection of individual orders and medications that allows users to easily look up and select the entries they most commonly use. Preference lists can be built by System Administrators for the purpose of simplifying (or restricting) the options that are available to a group of users, or they can be created on-the-fly by individual users that wish to have their own personalized list of frequently-used records.

Preference Lists can be built to be department or specialty specific and also for a facility/location, if the list of what is available per location differs.
SmartSets:
A documentation template used in the Ambulatory setting. A group of orders and other elements, such as notes, chief complaints, orders, medications, and levels of service charges, that are commonly used together to document a specific type of visit.

Chronic Cough
- Diagnoses
  - Cough [R05]
- Labs
  - CBC
    - Expires: 3/26/2018, Lab Collect, Blood, Venous, Blood
- Imaging
  - X-ray sinuses less than 3 view
- Procedures and Other Orders
  - Pulmonary function test
    - Routine, Clinic Performed, Expires: 3/26/2018
- Referrals
  - Ambulatory referral to ENT
    - Internal Referral, Routine, Otolaryngology, Specialty Services Required
- Medications
  - desloratadine (CLARINEX) 5 MG tablet
    - Take 1 tablet (5 mg total) by mouth 1 (one) time each day. OTC, Disp-30 tablet, R-11
- Level of Service
  - Office / outpatient visit, new patient, level 2 [99202]
- Additional SmartSet Orders
  - Search
    - You can search for an order by typing in the header of this section.
  - External Outpatient Pharmacy
    - 608-271-9000

Express Lanes:
Express Lane functionality uses SmartSets. It is an activity that puts all the tools that a provider needs to complete a specific visit into a single screen, in order to simplify and speed up their workflow.

Straightforward visits, will dynamically trigger Express Lane (based on chief complaint) to help providers speed through their documentation. Combined with specific snapshot reports, Express Lane utilizes streamlined SmartSets to document an entire visit from a single screen. Each click should be a decision-making click using Express Lanes.
Oncology Protocols:
In Beacon (oncology application), a protocol is a chemotherapy treatment template that contains recurring medication, procedures, and related orders for the span of oncology treatment.

Therapy Plans:
Therapy plans are pre-defined sets of orders and medications that are administered to a patient during multiple encounters at specified intervals, such as for dialysis or infusion therapy. System Administrators creates therapy protocols that include the necessary orders and common defaults for a given course of treatment.
For example, a clinician might create a dialysis protocol for patients with kidney failure that includes medication and procedure orders related to dialysis. When a clinician assigns a protocol to a patient, it becomes that patient’s therapy plan. Based on information entered by the project team and then by the clinician for the particular patient, the system calculates when particular orders for the specific patient should appear as due or available for action by a clinician.
Explanation of Content Tools in Epic

Documentation Tools

SmartPhrase
SmartPhrases are shortcuts for entering text quickly. They can include wildcards (***), Lists, and Links. Of all of the documentation tools, Phrases are the easiest to create and maintain (by users and builders).

You’ll often hear these referred to as “dot phrases”. Below is a sample HIP phrase that is pulling in text and a few links and lists.

![SmartPhrase Editor](image)

**SmartLinks**
Like Phrases, SmartLinks can also be called up using a dot and an abbreviation. Links' similarities to Phrases mostly end there, however. The purpose of a Link is to automatically include information in your documentation that is stored elsewhere in the system. In the example below, the lab Link we used pulled in results already stored in patients chart.

![Results from last 7 days](image)

**SmartText**
SmartTexts are the original documentation tool in EpicCare. This tool pulls all of the elements together to create a note template for documentation. Over time, the development of the SmartPhrase Editor borrowed heavily from the SmartText Editor and made the tools much more similar than they once were. In general, Texts are tools created and maintained by builders, while Phrases are under the control of users. While it is true that builders can create system Phrases, users can still override those with their own user Phrases. A SmartText is therefore the better tool to choose when building a template for standard documentation.

Here are few things a SmartText can do that Phrases cannot do. Texts can be:

- Limited by age, sex, functional type, etc.
- Included in a SmartSet
- Set as a default letter template or a button in the Communications activity
- Set as a default in a Notes section of the navigator (set in profile)
- Linked to an order (as order comments, scheduling instructions, or process instructions)
- Set as a default discharge summary
- Set as a default Assessment/Plan note for a problem
- Linked to a print group so that a message could appear to a user in a Patient Summary report (or any other report)

This is a simple example of a SmartText that is pulling in a mix of phrases, links, formatting, and wildcards.

```
Subjective
@NAME@ is a @AGE@ @SEX@ who is being seen on @ED@ for ***.
(HPI Complaints:123456)

Objective
***

Assessment/Plan
***
```

SmartForms

SmartForms are highly-customizable forms that capture discrete data. They can help your organization meet its specific data collection needs and can appear in different places in Epic, including NoteWriter, custom activities, and navigator sections.

Some key features of SmartForms include:

- Discrete data: SmartForm documentation is stored discretely which allows for consistent, accurate reporting off the data.
- Text generation: NoteWriter SmartForms can generate prose text based on selections and free text comments.
- Scripting: SmartForms can do things like "set all values to negative" to reduce documentation time.
- Images: SmartForms are one of a small number of documentation tools that can incorporate the use of images.
- Design features: SmartForms combine features like tri-state controls (positive/negative buttons), SmartTool-enabled text boxes, buttons, etc.
Flowsheets

Flowsheets (formerly known as Documentation Flowsheets or Doc Flowsheets) are a customizable documentation tool typically used in specialties that need to capture a wide variety of discrete information. For these specialties, flowsheets embedded in a navigator make data entry easier by allowing clinicians to enter values in a table rather than requiring them to type text in a note.

When information is stored in flowsheets, clinicians can view the information in reports and other activities, which help them observe trends and spot potential problems from one place without having to hunt for data. While both SmartForms and flowsheets capture data discrete, flowsheets are easier to build. Finally, clinicians can use SmartForms within the note writing workflows. Flowsheets must be documented first, and then you can pull data into a note using SmartLinks.
## Flowsheets

**Vital Signs**

<table>
<thead>
<tr>
<th>Temp Source</th>
<th>Oral</th>
<th>38 (100.4)</th>
<th>37.8 (100.2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heart Rate</td>
<td>75</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heart Rate Source</td>
<td>Right</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resp</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BP</td>
<td>120/80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BP Location</td>
<td>Left arm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BP Method</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Position</td>
<td>Lying</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Oxygen Therapy**

- **SpO2**
- **Pulse Oximetry Type**
- **Patient Activity**
- **Oxygen Therapy**

**Pain Assessment**

### 06/25/18 0700

- **Temp Source**: Oral
- **Select Single Option**: Oral
- **Tympatic**: Oral
- **Tympanic**: Oral
- **Rectal**: Oral
- **Axillary**: Oral
- **Temporal**: Oral
- **Temporal**: Oral
- **Skin**: Oral
- **Mandible**: Oral
- **Ear**: Oral
- **Eosophageal**: Oral

**Last Filed Values (24 hours)**

- **Oral**: by Nurse Inpatient, RN at 06/25/18 0400
- **First Filed Value**: Oral
  - by Nurse Inpatient, RN at 06/25/18 0400