Eight Efficiency Boosting Tips for Epic Users

Learn how to use the Epic electronic health system more efficiently. This list of tips was exclusively developed for AMA STEPS Forward™ by CT Lin, MD, Chief Medical Information Officer, University of Colorado Health.

Tip 1. Turn off the notifications.

Disable unnecessary notifications with a few quick clicks. When you add yourself to the care team, you can opt in to receive additional results ordered by other physicians and admission, discharge, and transfer (ADT) notifications.

Add New Assignment

Primary Location
Epic Health System

PCP
WALKER, DREW [4777]   916 Regent St Verona WI 53593

PCP Type   Start
General   4/5/2022

Specialty   End
Family Medicine

Comments

Receive Admission and Discharge Notifications?
Yes No

Receive Result Notifications?
All results Abnormal results only No results

Tip 2. Create future reminders for yourself.

Create reminders to check on a patient in a week, order a repeat computed tomography scan in 3 months, or ask a team member to call a patient in a month.

In Basket ✉ New Msg ▾   Delay sending until
   Date

- Go to your in-basket and select "New Msg" to create a staff or team message. Note: Team messages are not saved in the patient chart; these are purely reminders for yourself.
- Identify which patient the reminder is about by including their name in the message subject line.
- Do not include an email address in the "To" line.
- When you have finished drafting your reminder note, look to the bottom right of the screen for "Delay send."
- Click "delay send," then select a date.
- Your message will reappear on the specified date as your reminder.

Tip 3. Perform quick chart searches.

Use the search bar to find information almost anywhere in a patient's chart.

For example, search for terms and symptoms such as "fever," "A1c," or "antibiotic" that may be in typed or dictated notes and not on the problem list. Also, quickly find radiology reports, lab tests, and other results.

AM

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Code: Click for Info (no ACP docs)

🔍 Search
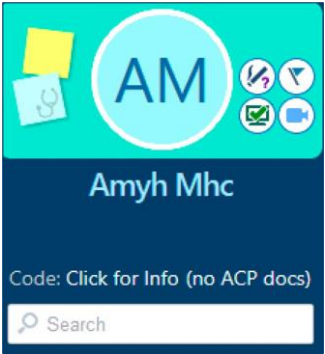
Tip 4. Use chart filters.

Find an ear, nose, and throat (ENT) consult, DEXA scan, ferritin, or all hemoglobin (Hb) results with a single click. Set filters to help you retrieve the information you regularly look up.
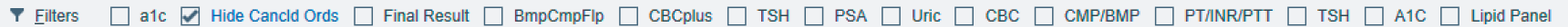

Chart Review

Every section inside Chart Review has a few default filters. For example, the Encounters Tab has a filter for your Specialty, your Clinic department, and notes you wrote yourself, called "Me." Use the Filters button on the far left to create and save your own favorites.

Here are some example filters for an internal medicine specialty:
Example one: filters for Hospital Admissions, ER visits, and one that shows only appointments called "visits."
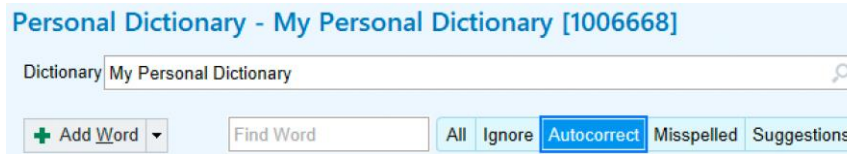
▼ Filters ☐ Internal Medicine ☐ UCHealth Internal Me... ☐ Admissions ☐ ER ☐ Hide Phone calls ☐ Pt. Emails ☐ Eye ☐ Visits ☐ Me

Example two: filters for the Laboratory results tab

▼ Filters ☐ a1c ☑ Hide Cancld Ords ☐ Final Result ☐ BmpCmpFlp ☐ CBCplus ☐ TSH ☐ PSA ☐ Uric ☐ CBC ☐ CMP/BMP ☐ PT/INR/PTT ☐ TSH ☐ A1C ☐ Lipid Panel

Tip 5. Use Autocorrect.

Create your own autocorrect dictionary that expands every abbreviation you commonly write and corrects it into the expanded word, phrase, or paragraph as you type.

Arial   10   **B** A   Insert SmartText

- Go to any screen with an open Text Box where you can see the green plus sign, such as a Progress Note or Patient Instructions.
- Right-click on any blank area of the text box and choose "Dictionaries" from the dropdown menu.
- Then choose the tab called "Autocorrect."

Personal Dictionary - My Personal Dictionary [1006668]

Dictionary My Personal Dictionary

＋ Add Word ▾   Find Word   All | Ignore | **Autocorrect** | Misspelled | Suggestions

- You will see existing words and what they correct to (or their replacement text). This is where you can add your own terms.
- Here's an example of a personalized autocorrect list showing commonly mistyped or misspelled words and their corrections:

Word ▲	Replacement Word
APparently	Apparently
Alzheimers	Alzheimer's
CXR	chest X-ray
Cz	Colorado
HIPPA	HIPAA
ILD	interstitial lung disease
O2sat	oxygen saturation
Osteoarth	Osteoarthritis
THanks	Thanks
abx	antibiotic
addt	additional
adr	Adriana
ahd	had
aki	acute kidney injury
antibx	antibiotic
approx	approximately
appt	appointment
appts	appointments

Tip 6. Use Smartphrases.

Develop Smartphrases to help you quickly locate specific dense or text-heavy information that may be hard to find with other methods. For example, a smartphrase may make finding a risk calculator or educational material on melanoma easier. You can even use smartphrases to pull up custom replies to emails or patient messages.

Sometimes these are called "dotphrases" because they start with a period followed by some letters telling Epic to call up specific phrases.

- Go to any screen with an open Text Box where you can see the green plus sign, such as a Progress Note or Patient Instructions,
- Press the green plus sign to create a new smartphrase.
- Keep in mind that the library of standard smartphrases numbers in the thousands. Therefore, we recommend that users start any smartphrase they create with their initials followed by a meaningful name, word, or phrase. That way, typing your own initials will bring up your entire personalized list.
- Use the following examples as starting points to make more smartphrases that will save you time.

Helpful smartphrases to try:

- *Example 1: cardiovascular risk calculator.* Calculate the 10-year cardiac risk score for a patient by typing ".risk".

You should then see something like this display, with values pulled from the patient's Epic data:

The 10-year ASCVD risk score (Goff DC Jr., et al., 2013) is: 13.1%
Values used to calculate the score:
Age: 68 years
Sex: Male
Is Non-Hispanic African American: No
Diabetic: No
Tobacco smoker: No
Systolic Blood Pressure: 130 mmHg
Is BP treated: No
HDL Cholesterol: 47 mg/dL
Total Cholesterol: 130 mg/dL

- *Example 2: custom patient education.* The smartphrase ".ctmelanoma" arose from frustration over typing or dictating an education mnemonic to teach patients about screening for melanoma.
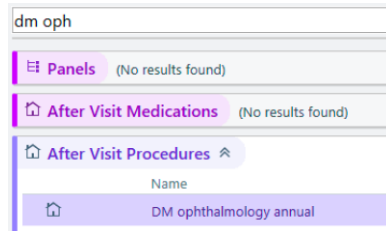

This expands to:
Melanoma skin cancer screening:
Look for flat dark moles on the skin with the following characteristics:
A: asymmetry (one side larger than the other)
B: border irregular
C: color patchy
D: diameter greater than a pencil eraser (5mm)
E: enlarging

Tip 7. Save favorite orders.

Eliminate the time spent searching the chart for medication orders, labs, radiology results, or referrals.	• Save your most frequently placed orders by hovering over your selected order just before signing it, clicking on the grey star that will become visible to the right of the order name, and creating a "favorite."
	• *Example 1: A custom ophthalmology referral with a reason, "diabetes annual."* Important: rename your customized order carefully. Consider using an autocorrect phrase. For example, when you type "dm oph," your custom referral appears ready to sign with no additional typing.
	• *Example 2: A custom prednisone taper. Typing "pred taper" into the Orders bar yields a series of prednisone taper prescriptions.*
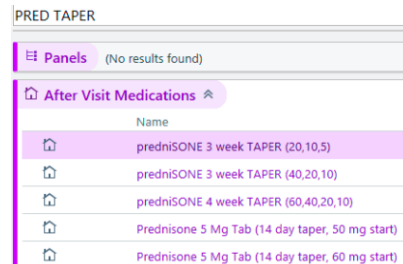
Tip 8. Use the "Make Me Author" function for team documentation.

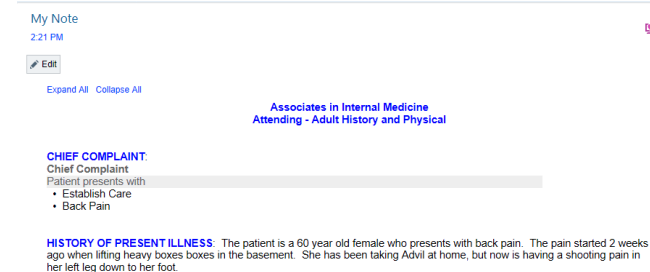|	
Allow nonphysician team members to access and input information (eg, HPI elements) into physician note templates during rooming.	• First, select edit in the upper left, identified with the number 1 in a red circle. • Then select "Make Me Author" in the upper right, identified with the number 2 in a red circle. The nonphysician team member can now edit as shown with blue highlights. • When the note is closed, authorship transfers back to the physician.
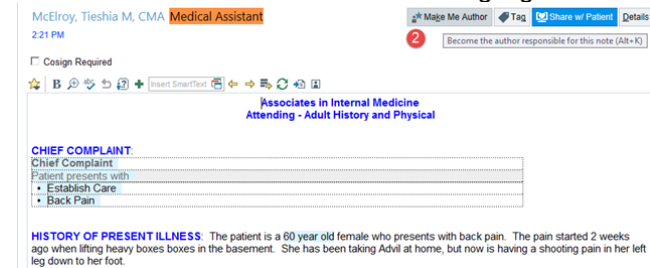
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Source: AMA. Practice transformation series: taming the EHR playbook. 2022.